



What is left of the country brand?

JOSEP-FRANCESS VALLS

There are four phenomena that require revisiting branding and country brand management. The first is deep change in traceability of products and services, which have an origin but get different inputs from third countries. The second are low prices, which facilitated the creation of private brands and shook up the brand landscape that had so far been taken exclusively by premium or medium brands. The third is the upcoming of all-embracing values like multiculturalism and cultural blending, giving importance to the contribution of talent by migrants.

And the fourth, developed in recent months following the economic crisis, is negative financial rating many countries are given by international agencies.

The purpose of this article is to analyse these phenomena and submit proposals to review the concept of country brand image and its usefulness for exports, attracting capital, the best international talent and tourism



There has been confusion in this area for a long time. Internationalisation expands as it finds niches in international markets facilitating quicker sale of products and services.¹ There are two drivers of internationalisation:

- ▶ Outsourcing of management areas that used to be internalised and are now ordered to other companies in other countries.

Relocation, offering competitive advantage in terms of access to cheaper raw materials and workforce under more interesting production conditions in other countries of the world.

Overall demand of low prices by consumers unleashed in recent years, which led to a deep shift of business concepts on behalf of the industry with the aim of reducing costs to sell cheaper,² fostered internationalisation to the point of creating a global manufacturing jigsaw.



- ▲ Telephone information services are among those being most affected by relocation to sites allowing cost reduction, especially based on low salary costs in Third World countries.

As a consequence, two points need to be recalled. The first is commoditisation of products and services: anywhere you go, to the city centre, department stores, the beach, monuments, additional tourist offer – besides the bigger or lesser personality of each particular asset in each country –, you find that everything has been replicated.

Patents and franchises have a given origin, but national groups operate them in every country – «nationalised» **Coke?** The process towards globalisation turns products and services common. The second point is international migration bringing people from other countries: cheap talent and workforce are going global. In such an environment, it becomes much more difficult to identify the origin of each part of production, the contribution of each national origin to the end product.

Which is eventually the origin of a product or service designed with a patent from a European country but manufactured in China, South-east Asia, Morocco or Brazil and finally entering the commercialisation process in another country? For instance, is the telephone information service we receive in Spain actually Spanish if it comes from India or Colombia through a foreign subcontracted company?

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If we add downgrading in financial rating affecting the financial solidity of many countries and increasing the country risk, do consumers still give the same credibility to the country brand that is supposed to protect them?

The Spain brand, the football World Cup and GDP

Following Spain's victory in the football World Cup in South Africa in summer 2010, some referred to a document by ABN AMRO bank to claim that Spanish GDP (gross domestic product) would grow thanks to this victory. The head of the Economic Department of that bank, Hein Schotsman, had written a report titled *Soccernomics 2010* in which he suggested a hypothesis that is nowhere proven: ever since 1974, the champion country gets a positive economic input leading to a medium-term GDP increase by 0.7%. Beyond the scarce value of the document and the figures upholding it, there are contradictions in key points that are not clear enough: does this always occur or only in times of economic growth; does it show in the short, medium or long term; or does growth rather occur in emerging economies or in Western countries? Despite this failed reference, it is interesting to raise the issue of a big event possibly resulting in economic growth.

Amidst economic crisis, the Spain brand suffered the negative impact of plummeting financial markets in the last months, which curbed on the country's financial rating. Additionally, the competitiveness of the Spain brand as an umbrella of products, companies, exports, tourism, talent and capital attraction, etc. is declining following the loss of competitiveness, for instance in the case of tourism, as shows the latest report by the World Economic Forum, in which the Spanish tourism brand is not among the most competitive, although it is among those with the highest turnover and tourist figures.

Does an event like the football World Cup improve the image of the champion country? We could say it leads to joy and increased self-esteem of fellow nationals. This state of mind involves higher momentary – and probably one-off – internal consumption of food, beverage, eating out, banners, disguises, paint and external agitation symbols, media, video games, sportswear, petrol, mobile communications, products and services advertising sports heroes, etc. All this expenditure, related with victory celebration, can accelerate economic recovery. But can there be any positive effect for the country brand at international level? An event like this will as such hardly bring more tourists, exports or talent. Why? If it was the host country, assuming that it has been well positioned on the international stage and used the right commercial tools, the dragging effect of broadcasting the event would cause a considerable increase of visitors during the following years in the medium term. This is the power of international media on the millions of people following the event. This was also the wonderful case of the years after the Barcelona 1992 Olympic Games, and the flow is still going. The host country stays in the mind of international consumers and the country brand is associated with the territory and heritage, the stadia where national sides are playing, folklore discovered by journalists, players and staff, the country's lifestyle, etc. However, one thing is the host country and another very different the winning country. The dragging effect does not benefit the latter, though it does perhaps the players. They can rather benefit by obtaining better contracts abroad. But the Spain brand is out of context once it leaves the scene of its exploits. Nevertheless, there is one thing to take into account: the bigger notoriety of the country associated to the title won. This lever can be used for the country brand and can help improve the image and expansion of some business like:

- ▶ National sports brands (if there are any)
- ▶ Certain soft products with a high immaterial content, related with the country's lifestyle and facilitating identification of the sports country, food, fashion, etc.
- ▶ Shows devoted to these products fostering attendance by **stakeholders**
- ▶ Anything advertised by champion athletes in markets able to motivate, conveying a sporty lifestyle of the country

We only envisage an impact out of such products, but it hardly will improve the overall country image and attract more tourists (to see what?), capital or talent, or facilitate overall and even less industrial exports. Improving a country brand requires a long-term goal and tools developed day after day and deploying the strategy. Some events, even if used adequately, hardly bring about any improvement despite momentary national joy unleashed by them.



Analysis of factors of change. Support of the country brand

Phenomena related with internationalisation are rather accelerating, which allows to forecast that the first three will last long; however, the negative effect of financial rating of many countries in recent months could reduce its pressure on the country brand in the medium term under different circumstances. Hence the question is: what items are we associating the country brand image to so it shines and remains the symbol of identity of a given territory?

The country brand image is a portfolio of meanings³ and is created in the consumer's mind as a result of a synoptic process appearing in the shape of contents, images, feelings and experiences. Keller⁴ acknowledges that the brand is more than something identifying a product, service, company, institution, idea or activity, message, denomination of origin or of course a given country, whether it is independent or not.

This portfolio of meanings by Keller or something more leads to brand equity⁵ leading to a double dimension: the brand associated to direct profitability of everything it protects and the brand associated to the consumer reaction shown in the notoriety and improved image. We understand the country brand as «stable high added-value global support settling in the people's mind, identifying and representing its products, values, feelings, experiences and lifestyle so as to clearly differentiate it from competition; it translates into signs approaching it to its audience and providing reliable information... Satisfactions are not generic, standardised and general anymore but specific, customised and particular; hence the country brand will be intricately related to values relevant to consumers.»⁶

What occurs when this stable high added-value global support fades? What happens when empathy and value acquired by the consumer,⁷

the promise of keeping to the properties,⁸ the whole set of promises⁹ and cognitive and affective information¹⁰ are blurred in the eyes of the receptor?

The country brand is a stable high added-value global support settling in the people's mind, identifying and representing its products, values, feelings, experiences and lifestyle so as to clearly differentiate it from competition.

We believe this stable high added-value global support is still valid as a sign of identity despite the confusion created following the aforementioned phenomena. The reasons are the following:

- ▶ The country brand still plays its pragmatic, safety, symbolic, lucid, associative and distinctive role.¹¹ What else could replace the country brand image to inform, assure quality, give value, facilitate choice, unite the image of a given composition of things and distinguish it from competition? No brand at all? A new construct to be created on unknown grounds? Nowhere in literature do we find any condition to replace it, neither in that dealing with the country nor in that dealing with **branding** in general.
- ▶ The complexity of country branding¹² ensures the way gone so far as it is based on geographic and territorial, economic, social, political and heritage criteria, historical and current lifestyle, experiences and relations, etc. All these items need to be further used, in convenient order and hierarchy, for the identity of the country, seeking a national and international impact. The national audience shall be addressed to join, develop their pride in the points in common and become the main speaker; the international audience shall buy national products and services, invest its capital and visit the country.
- ▶ The amount of country brand stakeholders, including the different government levels, companies, institutions, lobby groups,

infrastructures and facilities, products and services, arts, cultural industries, media, etc., only can act together to obtain synergies if there is a common code of action, a holistic concept,¹⁴ which is nothing else than the country brand.

The new competitive scenario reduces the effectiveness of the country brand. Therefore what is needed is to realign along new hierarchical lines the items the country brand image is to be associated to and rethink the management strategy in order to stand out as well or even more amidst so much confusion.

The problem is not that the country brand image does not serve as a high added-value stable support; the problem is that the new competitive scenario reduces the effectiveness of this tool. Therefore what is needed is first to realign along new hierarchical lines the items the country brand image is to be associated to, and second to rethink the management strategy in order to stand out as well or even more amidst so much confusion. As to the relevance of each phenomenon curbing on the strength of a country brand, the following needs to be noted:

- ▶ Traceability of products and services needs to clearly show in brand communication, placing the emphasis on the country leading the whole process and the capacity of streaming all external inputs.
- ▶ Private brands have brought an extraordinary amount of new brands to the market at a lower value; strengthening values and feelings, the country brand is able to keep excellence.
- ▶ Emerging all-embracing values like multiculturalism and cultural blending do not reduce the power of a country brand but place a new positive value in it.

Canada and lifestyle

Canada was not among the countries drawing most international attraction still a few years ago. Moreover, traditional postcards represented it as a land of snow, mounties and huts (together with old-fashioned folklore). It was a still undiscovered tourist country and most economic transactions were done with its big neighbour to the south, the United States. For some years now, Canada's new web portal¹³ has become the driver of the country's new brand image.

After stating that travellers are internet surfers, it was the first country taking the idea seriously that travellers from all over the world are so whether they buy online or not: decision-taking on their holiday destination starts in the internet or is developed in most cases through online searching. While most national websites were devoting large sums of money to creating glossy visual platforms with heavy contents and hardly any dynamism, Canadian national tourism officials decided to offer a modern image associated to lost paradises, freedom and pristine land, with a premium offer and an ideal place to do business.

Its portal captivates through its capacity of adapting the offer to all demands, to the point that travellers entering it for the first time are given the possibility of getting help to know what they are interested in specifically. How is this done? There is a fairly short enquiry with straightforward questions identifying the website visitor's lifestyle. As customers provide the answers, they obtain a list of routes, cities, landscapes and monuments that may appeal them, plus the sort of accommodation, restaurants and activities that suit best their lifestyle.

Canada has associated its image to experience, adventure, the great outdoors, friendliness, value for money and being an ideal place to do business. Thanks to these attributes it ranks second of the world's country brands according to Futurebrands. It has become a nice and attractive brand for both tourism and business. Two more properties are to be added to the Canadian brand: its universities have opened to international exchange with all continents and it is still among the most solidary countries of the world, keeping its cooperation budget.

All these attributes promoted the brand, turning it into one of the most powerful in the world.



▲ The maple leaf flag appears in all of the country's promotion actions.

▶ Negative financial rating many countries are given by international agencies appears as a circumstantial phenomenon that actually affects the brand image but is accepted by consumers as something exceptional.

Properties of the country brand image

Every country will have to identify how to guide its offer to confront it with the perception consumers have of its international notoriety, the products and services it provides, its capacity to attract investment, tourists, talent, etc. We chose two country brand image property models our suggestion is based upon. The first is the FutureBrands ranking and the second that by Hankison.

The **Country Brand Index** (CBI), a world ranking of national brands,¹⁵ has been around for some years now. The attraction criteria it uses are the following: authenticity, history, arts and culture, tourist resorts, accommodation variety, ease to work, safety, relax, natural beauties, beach, nightlife, shopping centres, food, outdoor activities and sports, friendly locals, attractiveness for families, value for money,

design, living standard, business environment, ease to do business, new business place, hosting capacity for conventions and meetings, ease for leisure after work, formal democracy, wish to live there, product quality, wish to visit it, advanced technology, environment.

As can be seen, it is twenty-six very different, somehow chaotic attributes, yet they bring together a wide variety of perspectives of countries attracting customers and tourists. Despite a geographically spread enquiry, a relatively small sample and a biased place to do it – airports – the model is still useful. The best country brands in 2009 were, ordered as follows, United States, Canada, Australia, New Zealand, France, Italy, Japan, United Kingdom, Germany and Spain. It has to be said that the United States benefited from the Obama effect and Canada, Australia and New Zealand have always been ranking top. The items best rated by respondents were:

- ▶ authenticity
- ▶ natural beauties
- ▶ outdoor activities
- ▶ friendly locals
- ▶ wish to visit the country

So we could say that the most attractive brands are those providing attributes related with the personality of the country and its lifestyle as well as barely explored cultural and natural heritage.

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The second model of properties we chose for this analysis breaks down into eleven activity **clusters** directly related with the country brand



▲ The Country Brand Index is a world ranking of national brands.

Chart: Relevance of attributes for the country brand image

	%
Activity and facilities: shopping, things to do, premium accommodation, city centres	16
History, heritage and culture	15
Atmosphere, lifestyle	13
Main business activity	10
External profile	9
Accessibility	8
Tourist businesses	7
Personality of people	6
International reputation	5
Economic development	4
Industrial environment	4
Others	2

Source: Hankison, 2004.

image (Hankison, G. 2004). The most relevant for the sample (44%) are the following:

- ▶ activities and facilities
- ▶ own personality
- ▶ lifestyle

These three preferred properties are followed by business activity, accessibility, tourist businesses and others (cf. chart above). The choice of these attributes seems to be much more ordered and exhaustive, yet the results turn out to be very similar to the first model.

As can be seen, both models assessed feature remarkable similarities allowing us to claim that the value proposition of a country brand – as a portfolio of meanings following Bedbury and Fenichelli or something more identifying the product following Keller – will need to associate ever less to:

- ▶ Geographical properties
- ▶ Destination assets and resources
- ▶ Infrastructure and services like signposting,

safety, cleanliness, accessibility, connectivity and intermodality, which are taken for granted in a modern country

- ▶ Variety, quantity
- ▶ Closeness to markets, although in times of crisis it makes the area of influence an alternative destination

Instead, it will need to become increasingly associated with:

- ▶ Values, roots, beliefs of people, heritage and territory, facilitating private or collective experiences¹⁶ at maximum freedom and intensity. Certainty of unleashing sensations, feelings, thoughts, actions, sensorial, affective and creative relations.¹⁷
- ▶ Lifestyle of natives and the result of blending, shown in creative industries, own literature, fashion, cuisine, design and activities. For instance,



▲ Scotland's landscape is one of the values of its country brand.

in New Zealand they are using rugby as part of their lifestyle, showing a substantial effect on tourists.¹⁸

- ▶ Ability to attract international talent thanks to the existence of international business schools and universities, research and innovation centres and attractive labour conditions.
- ▶ Infrastructure, facilities and services related with authenticity and exclusiveness, like hospitality, information, innovation, talent, creative industries,

support plants, activities, etc. to provide support to the whole contents of the offer.

- ▶ Defined country brand strategy with permanent support of international celebrities.
- ▶ Corporate social responsibility as a country, contribution to cooperation and solidarity, social value criteria agreed by all parties and the society.

Linked with these properties, the country brand image has an effect on the mind of consumers

National stereotypes and their impact on the brand

A quick look at present-day media and especially at the cinema programme will offer us a wide range of national stereotypes. They are not very different from those circulating years ago, though they evolve or can do so. Between «black Spain» and Carmen de Mérimée in the «young Spanish democracy», associated with creativity during political transition and economic recovery, and the present, being among the world's biggest economies and with more high-speed railway kilometres than France, lie not two but three very different Spains.

Following this idea, the Swiss are closed up and knowledgeable; the Italians passionate; the Germans cold and very orderly, which allows them to work hard and make durable products; the Canadians humble; the Americans straightforward, with no manners but at the same time innovative in almost everything; the French proud of their country being the best of the world and showing it their ability to export fashion and cuisine at a high price; the Spaniards lazy (having a siesta every day), improvising, lovers of bullfights, flamenco and Spanish omelette; and the Japanese professional plagiarists and developers of technologies. Are these and other stereotypes of any use for summarising certain perceptions the ones have of the others?

First of all, stereotypes appear with the others and express some real or perceived properties of a group. Across five items of human personality – emotional stability, extraversion, openness towards new experiences, friendliness and sense of accomplishment – 19 the certainty has spread that stereotypes associated to the 49 cultures analysed have hardly anything to do with reality. Stereotypes usually appear at a point in history with a specific intention and are projected into the future. Media, entertainment programmes and cinema spread them, oversimplifying personalities. Most stereotypes are not descriptive but judgements. These judgements can be positive, negative or neutral.

Positive stereotypes shall be used and cultivated. This is the case of the Germans, who in the penetration communication strategy of sanitary fittings manufacturer **Friedrich Grohe** used the slogan «by Germans» to confer durability and robust design to their products. The image of the Japanese raising sun gives technological support to many exports related with cars, white goods, brown goods, audiovisual products and video games.

Negative stereotypes need to be neutralised as quickly as possible or turned into positive ones as they can erode the country image. This is the case of Poland, where promotion of their own products was made by changing to the positive the botcher image of some of their fellow nationals in France, turning them into handsome, modern and orderly migrants. The Gulf countries counteract the negative stereotype of all Arab countries strengthening the image of wealth, innovation in creating cities and attraction to some of the world's leading museums.

Neutral stereotypes finally will require deep thought about the risk of turning them positive. The steps to change are not easy at all, so if they do not affect the image negatively, it shall do. Is it for instance derogative that Catalans are stereotyped as stingy or is it rather a friendly joke? If we are able to associate this stereotype to saving, to making a difference between the indispensable and the dispensable, to rationality in the cost structure, it can benefit a lot the image of a country without state but with a long history, medium-sized, human, Mediterranean and international, having a central geographical position and excellent accessibility

and visitors, offering them stable contents and values they assume. Unfortunately, the iconography of national brands features rather items from the first list than from the second: 80% of national icons analysed from 65 tourist countries describe the geography, physical resources or infrastructure.¹⁸

New factors in country brand image management

Confusion in the general brand scenario is extreme right now, and the danger of blurring is obvious. Hence, based on a well defined and clear value proposition associated to the properties chosen, brand management needs to be established allowing to interact with the brand customers on an ongoing basis.

Branding and brand architecture and maintenance

Branding requires to embrace the following items:

► **Country product.** The country is diverse as are its stakeholders, goods and services, feelings, tourist, industrial and training assets etc. However, there needs to be a single brand image in order to embrace all country products as well as the appropriate infrastructure, facilities and services for each moment, thus becoming a stable high added-value support serving each asset. There are still countries with a strong tourist industry working with two brands, a tourist and an industrial one.

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The country brand needs to represent the whole country and provide support for each existing asset; its management, associated to the brand image under an accordingly elaborated iconic

code, needs to overall improve the umbrella. Graphic efforts need to address semantics by means of the logo, the imagotype and other iconic items of national identity.

► **Support by the national public.** Without involvement by the domestic audience in what is theirs, the country brand image will not count on its most important speakers, its citizens.

► **Segmentation of domestic and international customers** so what reaches out to them is a neat image with an effect on their later purchasing behaviour.¹⁹ We divide the country buyers into four categories:²⁰

– *Value buyers.* They seek attributes in a very detailed way and ask for excellent value for money. For these buyers, the country brand value proposition needs to convey some functional aspects (safety and design) and much of social representation as well as aspirations and experience.

– *Relation buyers.* They are loyal to the brand and previous satisfactory experiences. The brand proposal therefore needs to be associated with



▲ The country brand needs to embrace the diversity the country offers.



▲ The New Zealand portal provides information for both travellers and investors.

strengthening identification, belonging to the group, sociability, all innovations and activities and the relation with the historical mindset.

– *Price buyers.* Their only motivation is low cost. To a larger or minor extent, any country as a low-cost offer. In each case, the country brand will be fully or partly associated with the cheaper channels, trying not to identify the whole country product with low-cost offer.

– *Convenience buyers.* They hardly do any comparison and move based on proximity, the most comfortable channel. The brand image conveys values of proximity and usability as well as levels associated with buying like the online channel.

The country brand has the challenge of presenting the adequate offer on the web. There are portals of some countries like Canada, Australia and New Zealand doing efforts in adapting to the demand of internet customers.

► **Channel.** While industrial products and most services expanded through the different international distributors, the case of tourism has been different. Tour operators used to monopolise the international market and were together with travel agents the only broker in the market from the beginning of mass tourism in the early 1960s till the end of the 20th century. Technological progress changed the scenario. Customers now use the internet and both in tourism as in general, the country brand has the challenge of presenting the adequate offer on the web. There are portals of some (tourist) countries doing efforts in adapting to the demand of internet customers (Canada, Australia, New Zealand), but most make little use of the opportunities of interacting with customers through the portal, presence in other websites and social networks. Thus they waste the opportunity of submitting their country value proposition through an indispensable channel. No matter whether they buy through the portal or not, the information flow and especially interaction with the customer on a permanent basis gets lost, and this is very negative. Most of the national brand communication occurs exclusively through the offline channel while the web is full of opportunities of direct dialogue with the consumer.

► **Brand code of action.** A user guide so all stakeholders and partners use the brand icon with maximum efficiency so as to foster direct dialogue with each consumer, providing them with satisfaction matching the perceived image and eventually improving it. The brand action structure will be as flexible as needed to facilitate the introduction of new slogans, adapted to each product or market, and associations with value contents, e.g. relevant chefs, celebrities, political, economic or social notoriety, international culture, festivals, design, experience activities, etc., in order to trigger the purchase of national products, tourism, international talent and others.

Management tools

We consider five tools to manage a country brand:

► **General coordination body.** For decades, countries have been having export coordination bodies in place, showing an excellent experience curve in fostering internationalisation. Also, countries with a strong tourist industry have created organisations focusing mostly on tourism commercialisation. On the one hand, a tight alliance between both needs to be forged so all industries of a country eventually benefit under the brand umbrella from both the internationalisation drive and product commercialisation, expanding their task to many other fields of action (planning, training, technological implementation, cooperation, etc.). On the other, these bodies shall open in most cases to public-private partnerships, the only way to ultimate efficiency.

► **Innovation.** The business model needs to be constantly reinvented, seeking to improve the country product, involvement of fellow nationals, best knowledge of the evolution of the market and consumer behaviour, the channel mix to better reach consumers and country and brand management. Innovation in general cost reduction will allow to devote obtained savings to increasing the country brand value.

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► **Market intelligence.** It has to do with permanent analysis of how products and markets evolve as well as consumer behaviour. Countries need to implement prospection tools considering management of present and future markets based on current and new customers and seeking always replacement customers. Intelitur, which together with the Spanish Ministry of Industry, Trade and Tourism runs the Higher Council of Spanish Chambers of Commerce, is an initiative addressed

at tourism but easily applicable to the overall brand of a country. It supplies the private Spanish tourist market, destinations and governments with information on markets, indicators, the evolution of the behaviour of each market, technological tools, etc.

► **Brand management.** A management tool needs to take care of the development of the brand in relation to markets and all country assets. It will be in charge of adequate use of the internal code and brand efficiency as well as the relation with the other brands to associate with for penetrating certain markets.

► **Indicators.** According to the country products and the life cycle, each country will choose the indicators to compose the full command board in order to do follow-up of the development of the country brand image.

Conclusions

Iconic tools and the country brand image management code are still a stable high



▲ Associating a product with its place of origin has yielded very satisfactory results.

added-value support. Although several phenomena – international traceability of products and services, low prices introduced by private brands, new all-embracing values like multiculturalism, negative financial rating of countries – blur its efficiency, it is able to stay as a support to all assets placed under its umbrella.

The country brand shall still deploy its function as something more identifying the product²¹ or the portfolio of meanings²² if associated increasingly to values, roots and beliefs of people; heritage and the territory facilitating private or collective experience at maximum freedom and intensity; the lifestyle of natives and the result of cultural blend; the capacity of attracting international talent; items improving the perception of authenticity and exclusivity, among others. Geo-

graphical, physical and descriptive properties are declining values as brand drivers.

There needs to be one single country brand image for the whole country, and it shall align all assets; seek involvement of fellow nationals; segment domestic and international markets; look after the channel composition so its contact not only does not worsen the perception of the image but also improves it; and create an action code for all stakeholders and partners involved.

Management tools seek general coordination based on the country brand image, which needs to be done with public and private initiative, permanent innovation throughout the country, market intelligence, brand management and management control indicators.

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