

PLACE BRANDING RESEARCH



TAKING YOUR REPUTATION PLACES

A successful brand delivers a strong and consistent message. It has the ability to set social, economic and cultural processes into motion. Just like companies and products, countries, cities, provinces and regions can also have distinct brand identities. **Place Branding** encompasses measuring that identity, evaluating its strengths and weaknesses and building and communicating differentiating and winning characteristics.

In 1996, Simon Anholt coined the term 'nation branding' and gave birth to an important field of place branding research. Since then, he's been working with governments to help them plan the policies, strategies, investments and innovations which lead their country towards

an improved profile and reputation. In addition to his consulting work, Mr. Anholt developed the measurement systems: the Nation Brands IndexSM (NBI) and City Brands IndexSM (CBI), to assess how citizens of the world view the nations, cities and regions of the world.

Since 2008, we've been partnering with Mr. Anholt to deliver the *Anholt-GfK Nation Brands IndexSM (NBI)* and *Anholt-GfK City Brands IndexSM (CBI)*. We assess, develop and implement brand strategies across nations, cities and regions, and provide the global and local insights needed to move a place's reputation forward. As well as increase the success of its business, trade and tourism efforts.

NATION BRANDING

Along with Mr. Anholt, we conduct the world's only comprehensive global nation branding survey. The *Anholt-GfK Nation Brands IndexSM* (NBI) helps governments, organizations and businesses understand, measure and ultimately build a strong national image and reputation. It measures the power and quality of each country's 'brand image' by combining the following six dimensions:

- » **Exports** - The public's image of products and services from each country and the extent to which consumers proactively seek or avoid products from each country-of-origin.
- » **Governance** - Public opinion about national government competency and fairness, as well as its perceived commitment to global issues such as peace and security, justice, poverty and the environment.
- » **Culture and Heritage** - Global perceptions of each nation's heritage and appreciation for its contemporary culture, including film, music, art, sport and literature.
- » **People** - The population's reputation for competence, openness and friendliness and other qualities such as tolerance.
- » **Tourism** - The level of interest in visiting a country and the draw of natural and man-made tourist attractions.
- » **Investment and Immigration** - The power to attract people to live, work or study in each country and how people perceive a country's quality of life and business environment.

Each country's score across the six dimensions is succinctly captured in the Nation Brand Hexagon with the total Index score. This tool provides a consistent framework for cross-country comparisons against the key factors impacting reputation, so you can see where your nation's brand ranks and why. In

Nation Brand Hexagon



The Nation Brand Hexagon
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analyzing this rich data set, our place branding team assesses your country's standing globally and in strategic markets over time, making the NBISM one of the most effective tools available for managing your country's reputation around the world.

Clients range from large, leading economies to smaller emerging countries and geographies that aspire to establish new identities and/or track their nation's image over time.

For 2014, the 50 measured nations* are:

- » **North America:** The U.S., Canada, Puerto Rico
- » **Western Europe:** The UK, Germany, France, Italy, Spain, Ireland, Scotland, Sweden, Denmark, Holland, Switzerland, Finland, Austria, Greece, Norway
- » **Central/Eastern Europe:** Czech Republic, Hungary, Poland, Russia, Turkey, Ukraine
- » **Asia-Pacific:** Japan, South Korea, China, India, Thailand, Indonesia, Singapore, Taiwan, Australia, New Zealand
- » **Latin America:** Argentina, Brazil, Mexico, Chile, Peru, Colombia, Ecuador, Jamaica
- » **Middle East/Africa:** United Arab Emirates, Iran, Egypt, Saudi Arabia, South Africa, Kenya, Nigeria, Qatar

* Several countries may be added to or subtracted from each wave of the survey fielded based on the specific requests and interests of NBI subscribers or as world events dictate.

CITY BRANDING

The *Anholt-GfK Roper City Brands IndexSM (CBI)* measures perceptions of cities among people in both developed and developing countries that play important and diverse roles in the flow of business, cultural and tourism activities. The CBI measures the following six dimensions:

- » **Presence** - Based on the city's international status and standing and the familiarity/knowledge of the city globally. It also measures the city's global contribution in science, culture, and governance.
- » **Place** - Exploring people's perceptions about the physical aspect of each city in terms of pleasantness of climate, cleanliness of environment and how attractive its buildings and parks are.
- » **Pre-requisite** - Determines how people perceive the basic qualities of the city; whether they are satisfactory, affordable and accommodating, as well as the standard of public amenities such as schools, hospitals, transportation and sports facilities.
- » **People** - Reveals whether the inhabitants of the city would be warm and welcoming, whether respondents think it would be easy for them to find and fit into a community that shares their language and culture, and if they would feel safe.
- » **Pulse** - Determines if there are interesting things with which to fill free time and how exciting the city is in regard to new things to discover.
- » **Potential** - Measures the economic and educational opportunities within the city, such as how easy it might be to find a job, whether it's a good place to do business or pursue a higher education.

Each city's score across the six dimensions is succinctly captured in the City Brand Hexagon.

City Brand Hexagon



The City Brand Hexagon
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For 2013, the 50 measured cities* are:

- » **North America:** Boston, Chicago, Denver, Los Angeles, Montreal, New York, Philadelphia, Seattle, Toronto
- » **Western Europe:** Amsterdam, Barcelona, Basel, Berlin, Brussels, Copenhagen, Dublin, Edinburgh, Geneva, London, Madrid, Milan, Paris, Rome, Stockholm, Vienna
- » **Central/Eastern Europe:** Istanbul, Moscow, Prague, Warsaw
- » **Asia Pacific:** Auckland, Bangkok, Beijing, Hong Kong, Melbourne, Mumbai, Seoul, Shanghai, Singapore, Sydney, Tokyo
- » **Latin America:** Buenos Aires, Mexico City, Rio de Janeiro
- » **Middle East/Africa:** Cairo, Cape Town, Doha, Dubai, Durban, Jeddah, Johannesburg

*Several cities may be added to or subtracted from each wave of the survey fielded based on the specific requests and interests of CBI subscribers or as world events dictate.

PLACE BRANDING CUSTOM STUDIES

With rich trends and insights and a robust analytical framework from NBI and CBI, we also help clients design and implement custom ad hoc place branding studies to focus on particular issues and competitive sets, and to study various stakeholder groups.

When tapping into our global resources and local research capabilities, clients can benefit from the following:

Stakeholder Executive Interviews—Available in locations across North America and around the world, *GfK Executive Interviews* enable you to monitor the opinion towards your “place brand” among critical stakeholder groups regardless of where they may be located. Interviews are conducted by expert interviewers, many who are former executives, and are highly-skilled in recruiting and interviewing hard-to-reach respondents. *GfK Executive Interviews* get beyond protective gatekeepers to ensure you reach your target audience. From Fortune 500 executives to non-profit organization representatives, government officials, media, cultural and religious personalities, we can connect you with the influencers, stakeholders and opinion leaders who impact the success of your brand.

Communication Research and Consulting—Whether you’re looking to reposition your brand, redefine your target audiences, or generate impactful communication, we can

help. We routinely conduct public diplomacy and communications studies in countries around the world. Our clients are looking to identify what drives desired outcomes, whether it is to increase acceptance in distant or unfriendly societies, to motivate stronger stakeholder support for policy initiatives, or to craft distinct brand messages that cut through clutter. By helping you “own” the issues that matter most to your brand vitality, our reputation and brand positioning experts can distinguish your country, city, or region as the thought leader. And help you make headlines in the process. Our vast experience in **advertising research** ranking, from concept test, creative testing to ad tracking and ROI, are routinely leveraged by our place branding clients.

Global and Cross-cultural Insights about Your Place Brand—With access to the extensive NBI and CBI, and GfK Roper Reports® US and Worldwide databases, the GfK team can combine insights with research specifically designed for you.

We offer customized fact-based consulting. It’s rooted in a deep understanding of the cross-cultural perceptions and social climate impacting public and elite opinion towards cultures of the world. Whether you need a deeper understanding of a single market or several countries around the world, we combine global resources with local expertise to meet your specific research needs

QUESTIONS?

For more on how we can help you with your brand assessment research, contact Xiaoyan Zhao at (650) 289-2051 | xiaoyan.zhao@gfk.com or Mark Keida at (202) 747-1823 | mark.keida@gfk.com or visit www.gfk.com

MEET OUR PLACE BRANDING EXPERTS

The GfK Public Affairs & Corporate Communications' core Place Branding team includes:

Xiaoyan Zhao, Ph.D., Senior Vice President and Director, Global Research and Consulting

Xiaoyan has more than 25 years of international research and consulting experience, servicing clients on all continents in the areas of values, attitudes, and lifestyle trends; positioning and communication; concept and message tests; audience segmentation; issues, risks, and policy influence; and corporate and place image and reputation. She leads GfK's global place branding practice, working with over 30 nations and cities around the world.

Mark Keida, Ph.D., Vice President

Mark is a professionally-trained focus group moderator and has taught courses in comparative politics. He also has extensive experience conducting research among hard-to-reach audiences and stakeholders such as governmental elites and CEOs. His place brand clients are from five continents including Chile, New Zealand, and Switzerland.

Elisheva Alpert, Research Manager

Elisheva began her career on GfK's Place Branding team, and now manages the Anholt-GfK Nation Brands Index and City Brands Index projects, as well as similar custom studies. Elisheva is responsible for product

planning and coordination, research quality control, strategic analysis, and client servicing. Her place branding clients hail from both developed and developing nations including Germany, Taiwan, and Qatar. Her education background is Social Psychology and she is currently working towards her MA in Survey Research.

Kristin Pondel, Senior Research Director

Kristin brings to our place branding team her global research experience that extends across six continents on attitudes and concerns of both general population and elite audiences. Kristin's analyses of the public-opinion landscape have been published in POLITICO, and her work in political science has been awarded the Marian Irish Award by the Southern Political Science Association. She has served clients from around the world including South Africa and the United Kingdom.

Our team of Place Branding experts is supported by renowned author and consultant Simon Anholt, as well as by GfK Public Affairs & Corporate Communications' own experienced research professionals located in Washington DC, New York City, Princeton, NJ, and Silicon Valley, CA.