



exesios bdd

dba Association
Member

IBRAVE PROJECT

PERCEPTIONS & BENCHMARKING

Paul Vincent Brammer

**EXESIOS BDD
UK PROJECT PARTNER**





PERCEPTIONS & BENCHMARKING

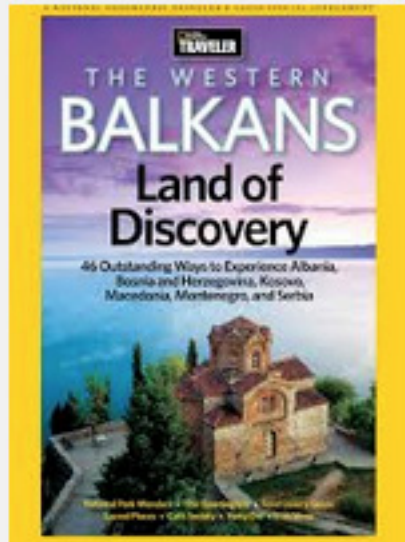
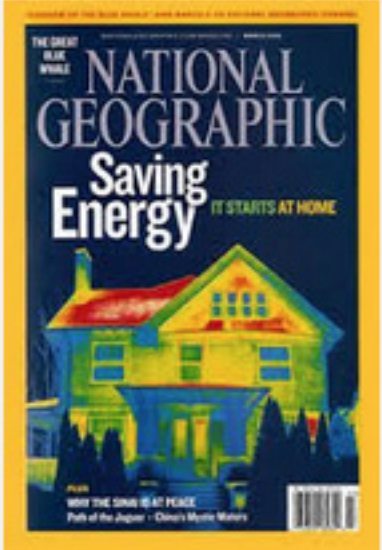
GLOBALISATION

- As part of the benchmarking process and to see where our regions sit in the globalised world of today we need to take into account the following

PERCEPTIONS & BENCHMARKING

PERCEPTION SOURCES

- Indexes
- League tables
- Brand barometers
- Magazines
Monocle, Conde Naste Traveller, Lonely planet Guides etc
- Social media



PERCEPTIONS & BENCHMARKING

LEAGUE TABLES / INDEXES

- Why are they important?
- How do we sort the most useful ?
- How can they benefit a place/city ?

PERCEPTIONS & BENCHMARKING

SIMON ANHOLT

- Leading place practitioner
- Received Nobel prize for economics
- First to measure 'Good Place'



PERCEPTIONS & BENCHMARKING

GOOD COUNTRY INDEX



PERCEPTIONS & BENCHMARKING

OVERALL RANKINGS

- Health & Wellbeing
- Science & Technology
- Culture
- International Peace & Security
- World Order
- Planet & Climate
- Prosperity & Equality

PERCEPTIONS & BENCHMARKING

**‘NOT ABOUT BEING THE
BEST OR BESTEST BUT
THE GOODDEST!!’**

And the winners are....

PERCEPTIONS & BENCHMARKING

HEALTH & WELLBEING

■ No.1 Spain (IBRAVE Country)

Good Country Index Overall Rankings

Science and Technology

Culture

Int'l Peace and Security

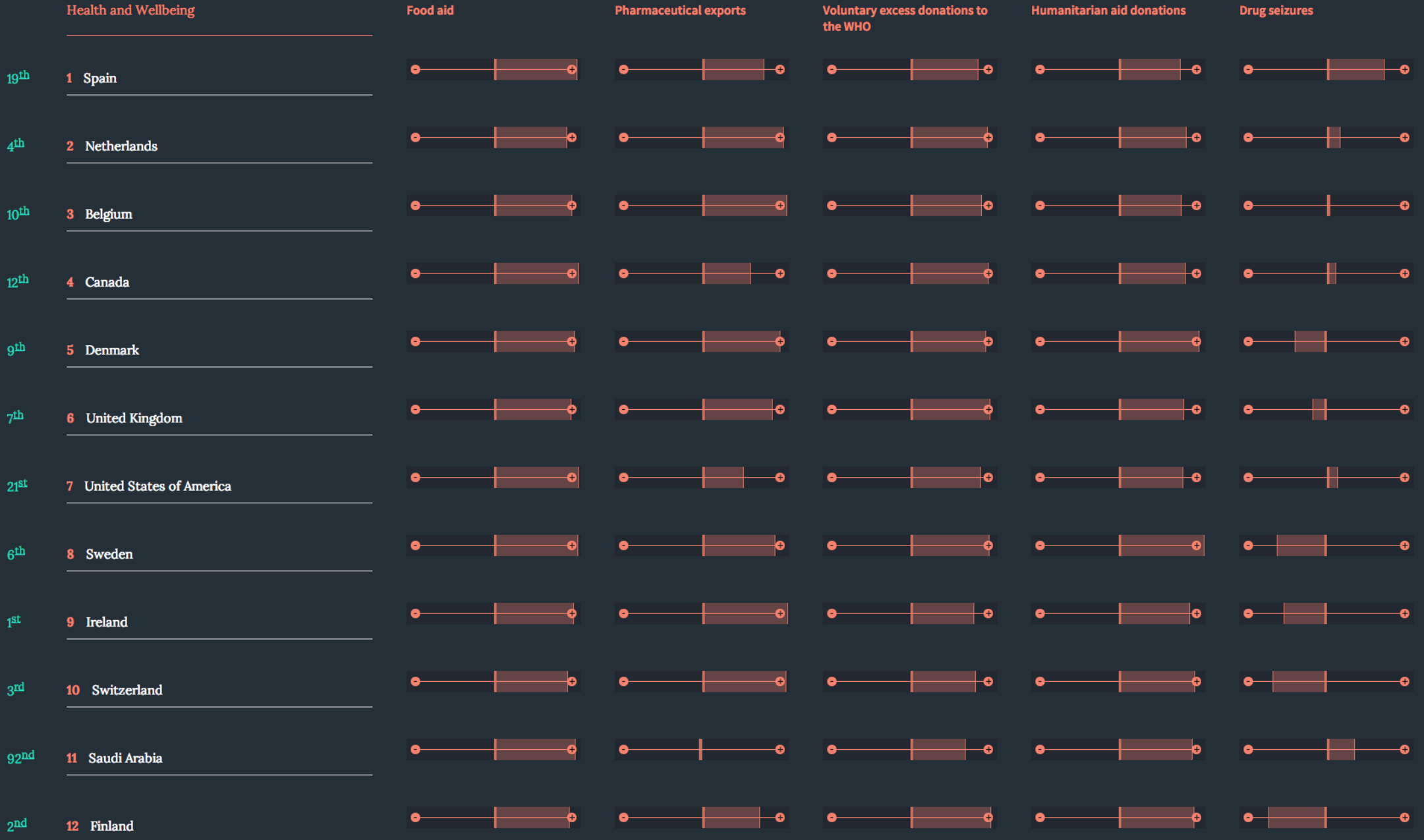
World Order

Planet and Climate

Prosperity and Equality

Health and Wellbeing

Health and Wellbeing



PERCEPTIONS & BENCHMARKING

SCIENCE & TECHNOLOGY

■ No.1 United Kingdom (IBRAVE Country)

Science and Technology

		International students	Journal exports	International publications (2009)	Nobel prizes	Patents
7 th	1 United Kingdom					
14 th	2 Austria					
18 th	3 Cyprus					
43 rd	4 Czech Republic					
37 th	5 Israel					
3 rd	6 Switzerland					
2 nd	7 Finland					
6 th	8 Sweden					
61 st	9 Hungary					
5 th	10 New Zealand					
13 th	11 Germany					
11 th	12 France					

PERCEPTIONS & BENCHMARKING

CULTURE

■ No.1 Belgium (IBRAVE Country)

Good Country Index Overall Rankings

Science and Technology

Culture

Int'l Peace and Security

World Order

Planet and Climate

Prosperity and Equality

Health and Wellbeing

Culture

Creative goods exports

Creative services exports

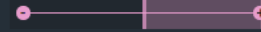
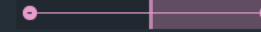
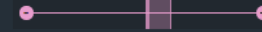
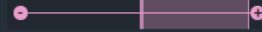
UNESCO dues in arrears as % of contribution

Freedom of movement, i.e. visa restrictions

Press freedom

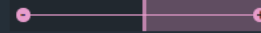
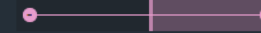
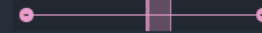
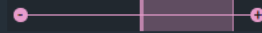
10th

1 Belgium



4th

2 Netherlands



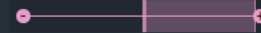
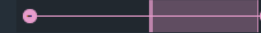
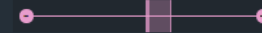
23rd

3 Malta



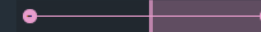
14th

4 Austria



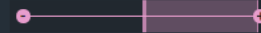
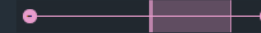
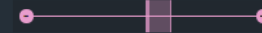
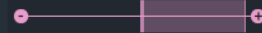
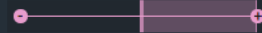
13th

5 Germany



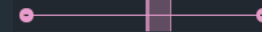
34th

6 Estonia



1st

7 Ireland



43rd

8 Czech Republic



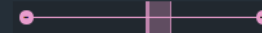
9th

9 Denmark



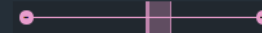
16th

10 Luxembourg



69th

11 Lithuania



7th

12 United Kingdom



PERCEPTIONS & BENCHMARKING

INT'L PEACE & SECURITY

■ No.1 Egypt

Good Country Index Overall Rankings

Science and Technology

Culture

Int'l Peace and Security

World Order

Planet and Climate

Prosperity and Equality

Health and Wellbeing

Int'l Peace and Security

Peacekeeping troops

Dues in arrears to UN peace keeping budgets

International violent conflict

Arms exports

Internet security (2012)

Rank	Country	Peacekeeping troops	Dues in arrears to UN peace keeping budgets	International violent conflict	Arms exports	Internet security (2012)
68 th	1 Egypt					
50 th	2 Jordan					
63 rd	3 United Republic of Tanzania					
76 th	4 Lesotho					
41 st	5 Uruguay					
97 th	6 Togo					
118 th	7 Benin					
54 th	8 Paraguay					
103 rd	9 Nigeria					
39 th	10 Ecuador					
85 th	11 El Salvador					
38 th	12 Ghana					

PERCEPTIONS & BENCHMARKING

WORLD ORDER

■ No.1 Germany

Good Country Index Overall Rankings

Science and Technology

Culture

Int'l Peace and Security

World Order

Planet and Climate

Prosperity and Equality

Health and Wellbeing

World Order

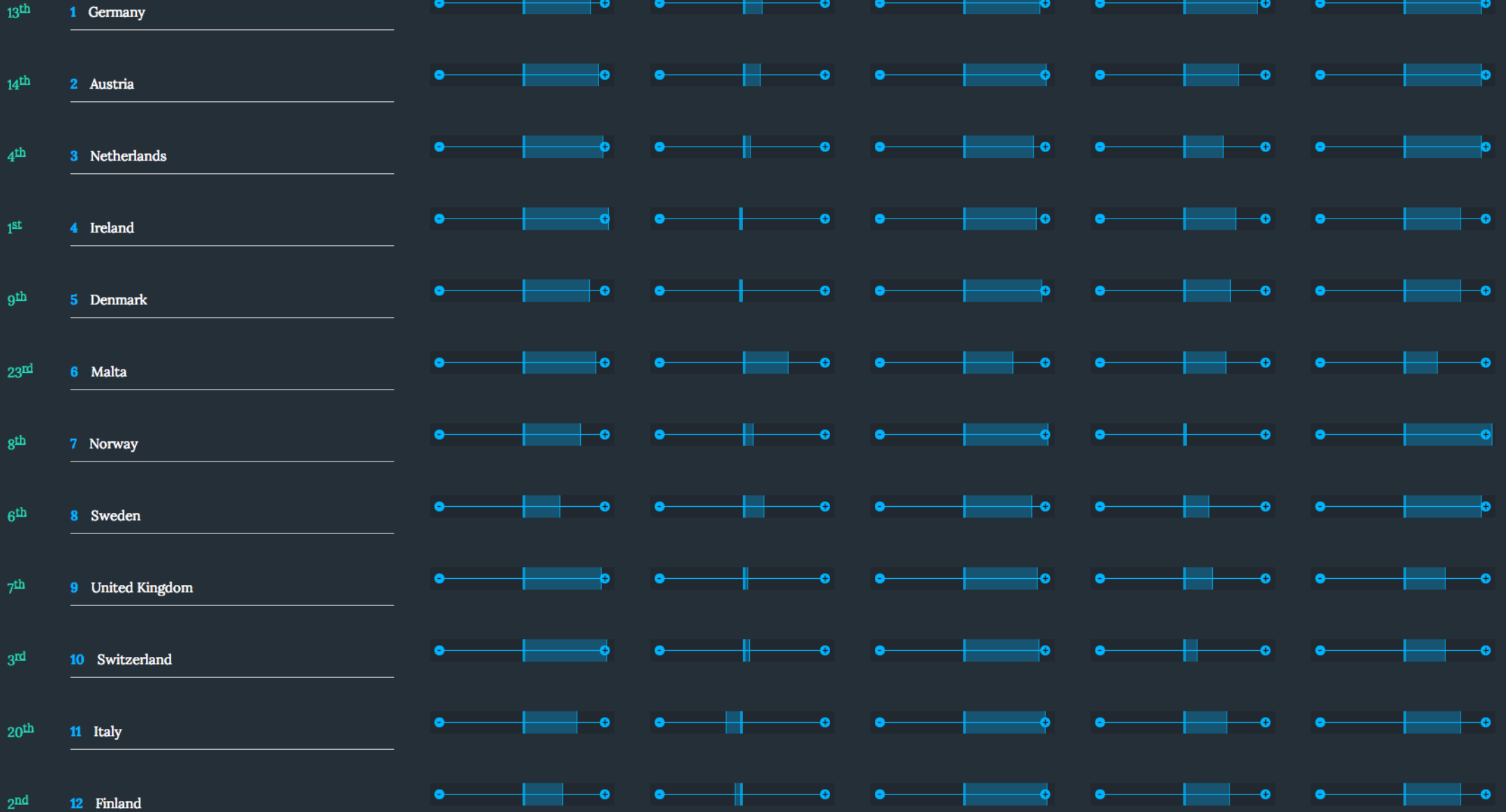
Charity Giving

Refugees hosted

Refugees generated

Population growth

UN Treaties signed



PERCEPTIONS & BENCHMARKING

PLANET & CLIMATE

■ No.1 Iceland

Good Country Index Overall Rankings

Science and Technology

Culture

Int'l Peace and Security

World Order

Planet and Climate

Prosperity and Equality

Health and Wellbeing

Planet and Climate

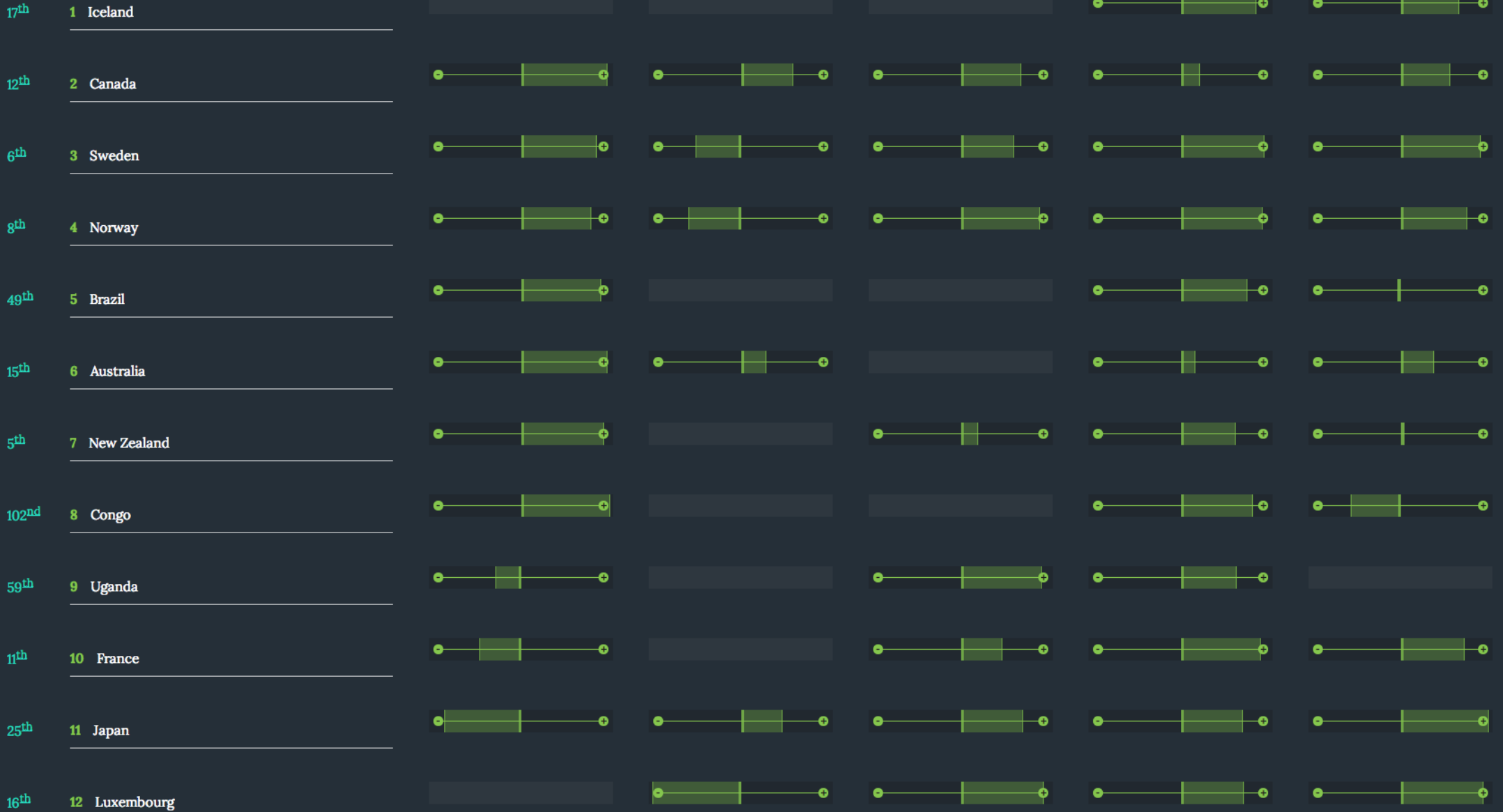
Biocapacity reserve (2009)

Hazardous waste exports (2011)

Organic water pollutant (BOD) emissions (2007)

CO2 emissions

Other greenhouse gas emissions



PERCEPTIONS & BENCHMARKING

PROSPERITY & EQUALITY

■ No.1 Ireland

Good Country Index Overall Rankings

Science and Technology

Culture

Int'l Peace and Security

World Order

Planet and Climate

Prosperity and Equality

Health and Wellbeing

Prosperity and Equality

Open trading

UN volunteers abroad

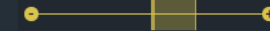
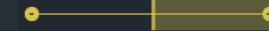
Fairtrade market size

FDI outflows

Development assistance

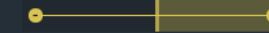
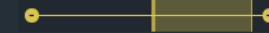
1st

1 Ireland



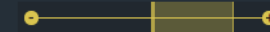
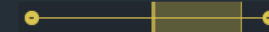
3rd

2 Switzerland



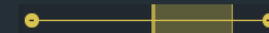
2nd

3 Finland



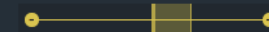
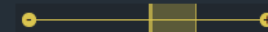
6th

4 Sweden



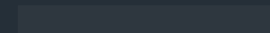
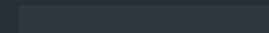
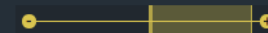
10th

5 Belgium



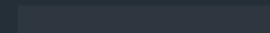
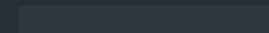
38th

6 Ghana



27th

7 Singapore



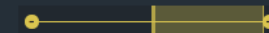
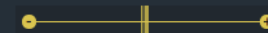
4th

8 Netherlands



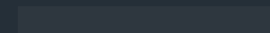
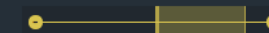
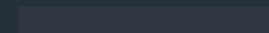
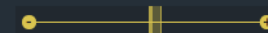
7th

9 United Kingdom



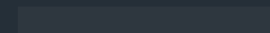
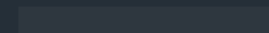
58th

10 Malaysia



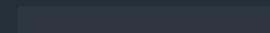
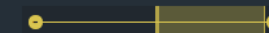
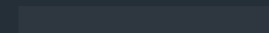
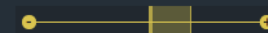
40th

11 Zambia



64th

12 Botswana



PERCEPTIONS & BENCHMARKING

OVERALL RANKING

Good Country Index Overall Rankings

Science and Technology

Culture

Int'l Peace and Security

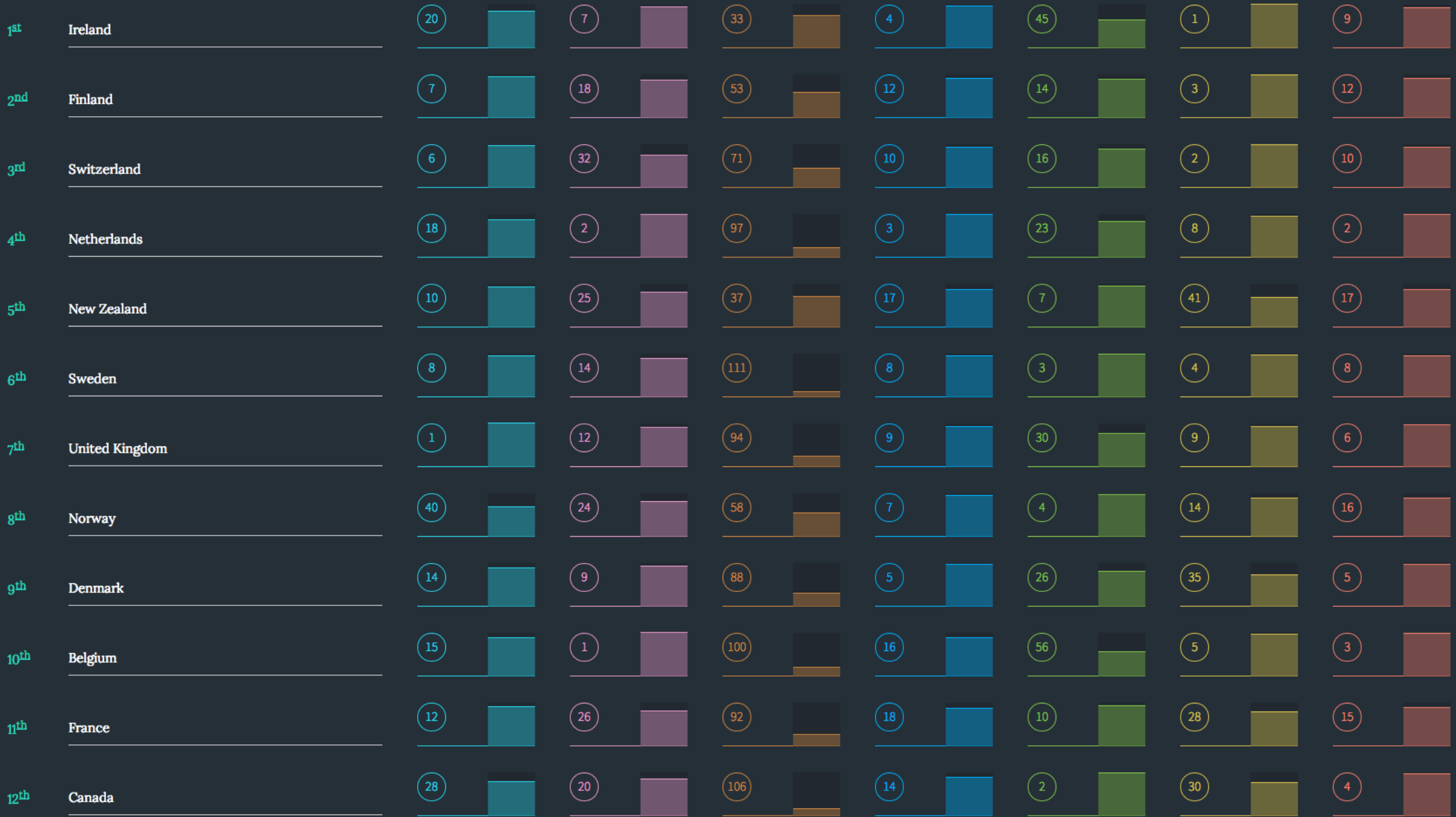
World Order

Planet and Climate

Prosperity and Equality

Health and Wellbeing

Overall Rankings



PERCEPTIONS & BENCHMARKING

COUNTRY BRAND INDEX...

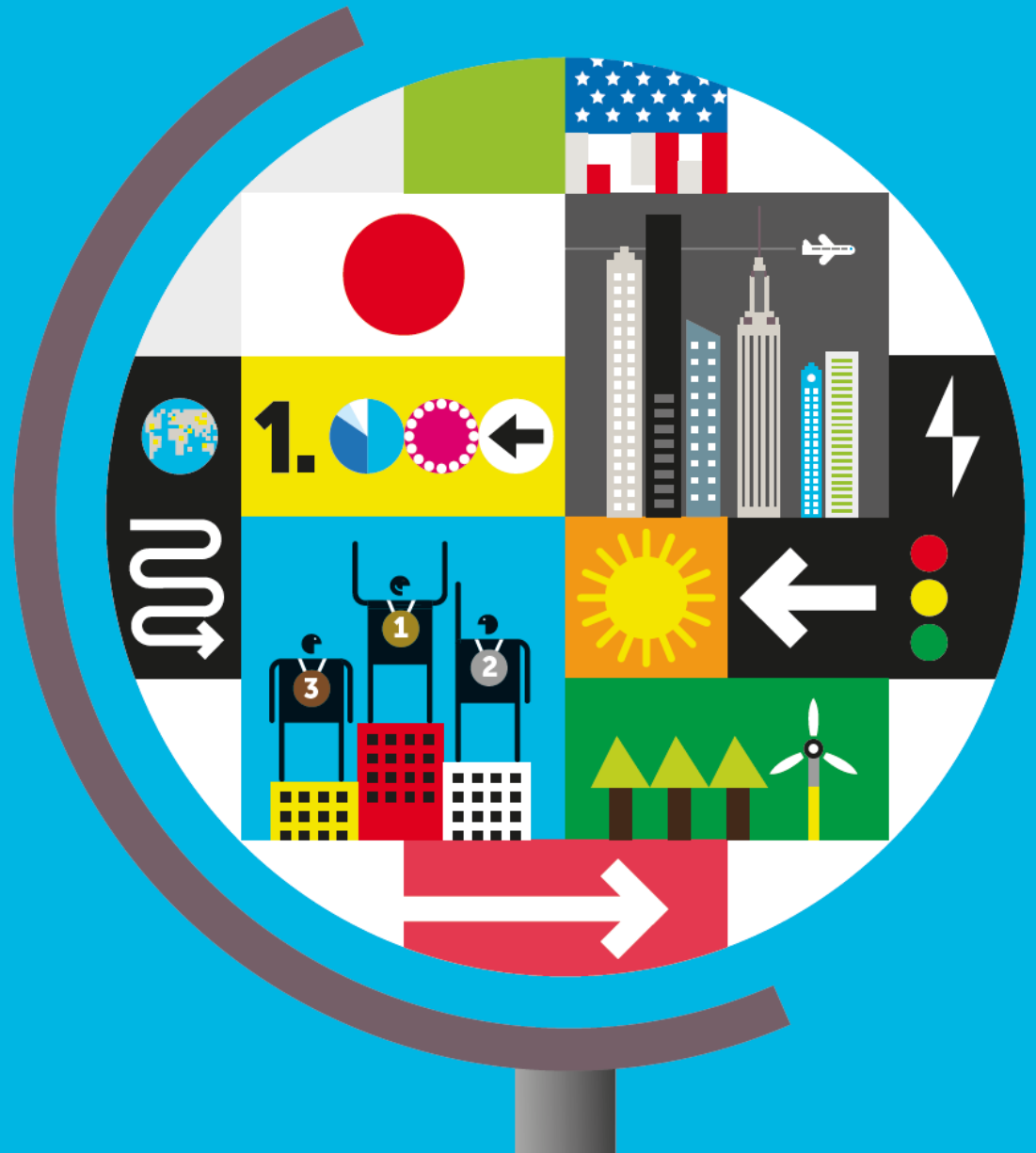
2014-15 FUTUREBRAND

- The first time the ‘Country Brand’ has been defined in an index... as some countries are NOT brands apparently
- The importance of ‘made in place’

FutureBrand

*The
creative
future
company.*

Country Brand Index 2014-15



Association dimensions

HIERARCHICAL DECISION MODEL (HDM)

FutureBrand's proprietary model for determining how key audiences perceive a country's brand.

AWARENESS

How well do people know the country and its offerings?

FAMILIARITY

What qualities come to mind when people think of the country?

ASSOCIATIONS

How highly do audiences esteem the country? Does it resonate?

PREFERENCE

Is the country considered for a visit? What about for investment, to acquire or consume its products?

CONSIDERATION

To what extent do people follow through and visit the country or establish a commercial relationship?

DECISION/VISITATION

Do visitors recommend the country to family, friends and colleagues?

STATUS			EXPERIENCE		
VALUE SYSTEM	QUALITY OF LIFE	BUSINESS POTENTIAL	HERITAGE & CULTURE	TOURISM	MADE IN
Political freedom	Health & education	Good for business	Historical points of interest	Value for money	Make products that are authentic
Environmental standards	Standard of living	Advanced technology	Heritage, art & culture	Range of attractions	Make products of high quality
Tolerance	Safety & security	Good infrastructure	Natural beauty	Resort & lodging options	They create unique products
	Would like to live/study there			Would like to visit for a vacation	Would like to buy products made in that country
				Food	

Not all countries are country brands

1. Not all countries are country brands

The central hypothesis behind this year's research was that not all countries qualify as 'brands', and the findings are striking. First of all, of the 75 countries included in our survey, only 22 qualify as 'country brands' by our measures.

Japan, Switzerland, Germany, Sweden, Canada, Norway, United States, Australia, Denmark, Austria, New Zealand, United Kingdom, Finland, Singapore, Iceland, Netherlands, France, Italy, United Arab Emirates and South Korea.

By this, we mean that people have stronger than average perceptions of the country across our six dimensions relating to the balance of 'status' and 'experience'. In other words, they perceive it equally strong in aspects relating to Quality Of Life, Value System and Business Potential, as they do for its Culture, History, Tourism and 'Made In' expertise.

Those countries with a bias in favour of Quality Of Life, Value System and Business Potential are classified as 'status countries', and they include Belgium, Qatar and Bahrain. The brand development opportunity for these countries lies in perceptions of Culture, Tourism and 'Made In'.

Those countries with a bias in favour of Culture, History, Tourism and 'Made In' are classified as 'experience countries' and include places traditionally strongly associated with Tourism. The brand development opportunity for these countries lies in perceptions of Quality Of Life, Value System and being Good for business.

The remaining 'countries' have weaker than average perceptions overall against both status and experience dimensions, although some are stronger than others. For example, Russia and Taiwan sit at the threshold of country brands in terms of perception strength, whereas Nigeria, Ukraine and Bangladesh have the weakest perceptions overall.



75
Countries included
in our survey



22
Only 22 qualify as
'country brands'
by our measures...

Top 20 countries



Europe

81% Awareness		Overall Ranking	Country	Ranking	
	Switzerland	2		Spain	23
	Germany	3		Portugal	27
	Sweden	4		Czech Republic	29
	Norway	6		Greece	30
	Denmark	9		Russia	31
	Austria	10		Malta	35
	United Kingdom	12		Croatia	44
	Finland	13		Poland	45
	Iceland	15		Estonia	47
	Netherlands	16		Turkey	53
	France	17		Hungary	56
	Italy	18		Slovakia	59
	Ireland	21		Romania	62
	Belgium	22		Bulgaria	67
				Ukraine	74

65% Awareness

Region's key strengths



Visit for holiday
Range of attractions
Natural beauty
Historical points of interest
Heritage, art & culture

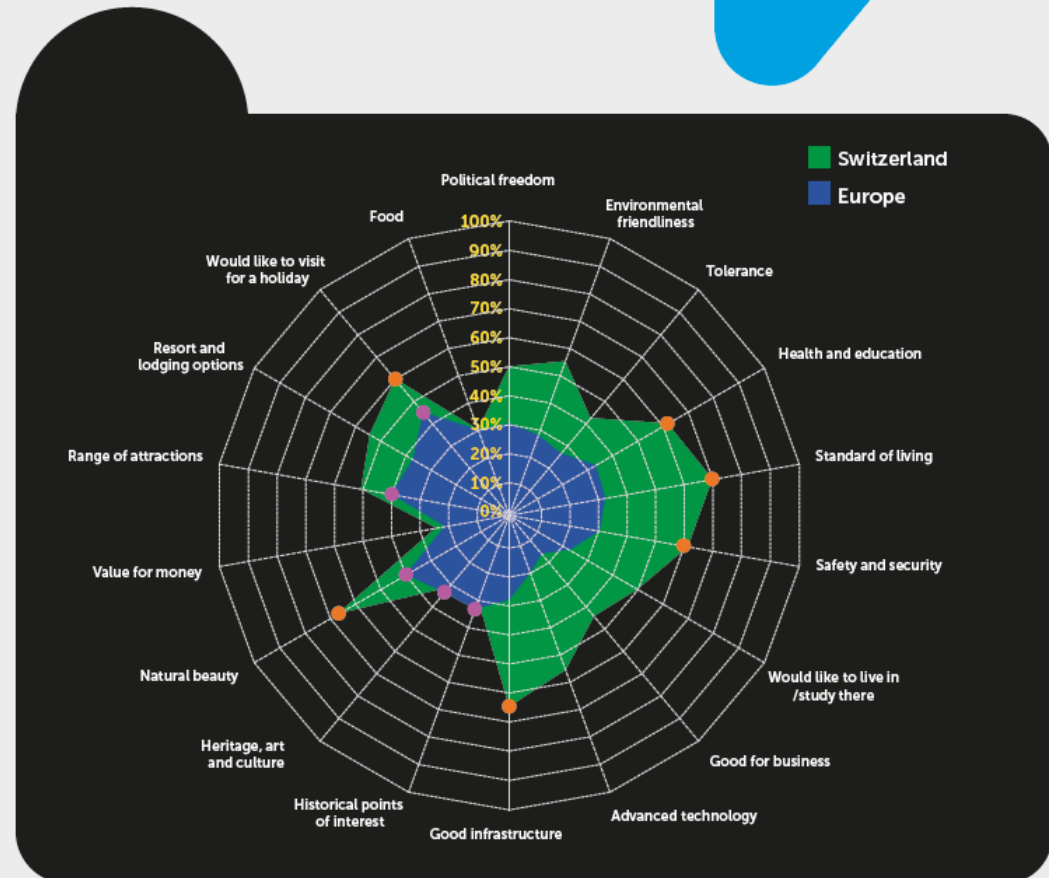
Region's key weaknesses



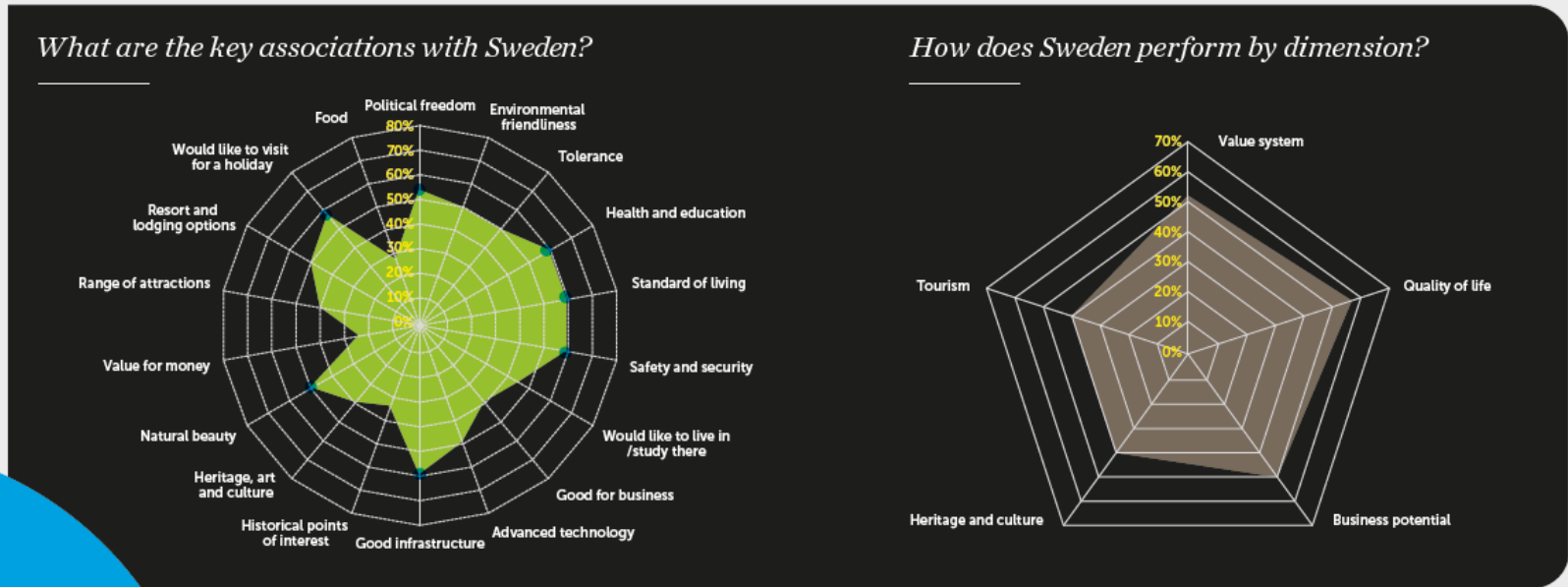
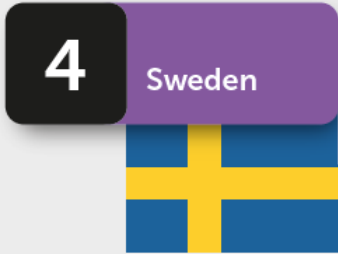
Value for money
Food
Good for business
Advanced technology

Country Brands

13



Sweden - Summary of perceptions



A country with a high standard of living, a good level of equality among its inhabitants without pockets of poverty and with general well-being. Good industry and good labour and social laws.

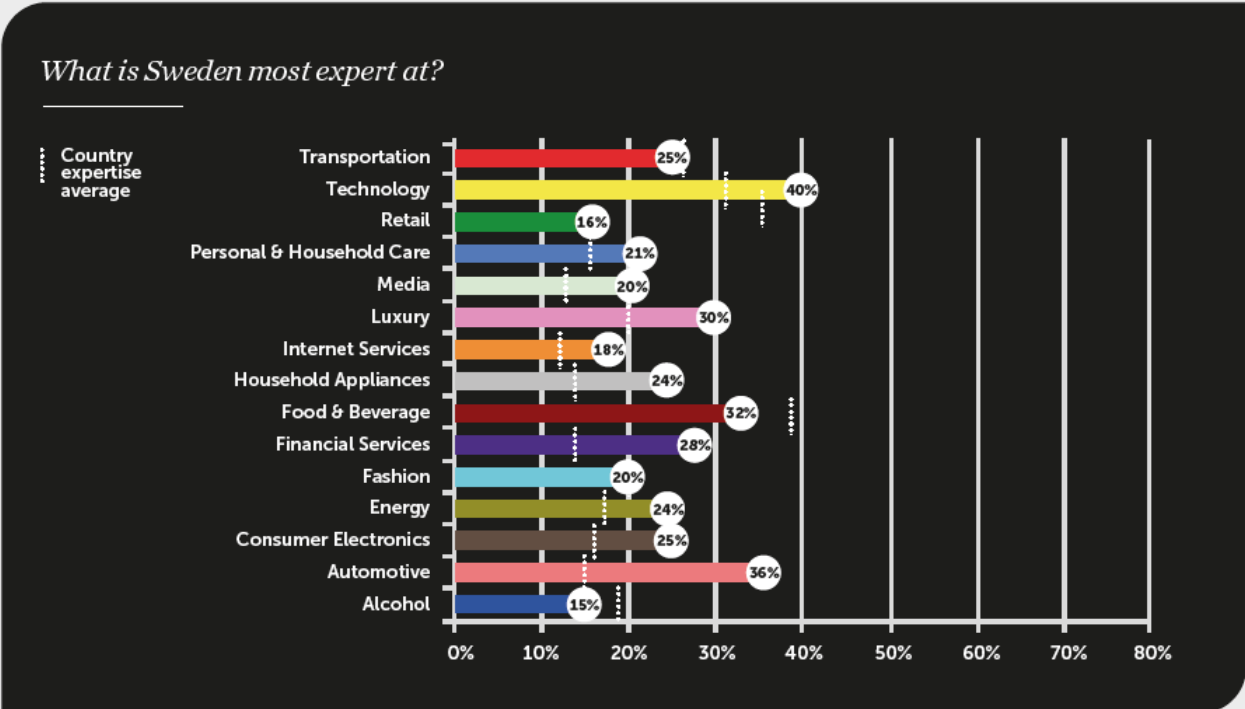
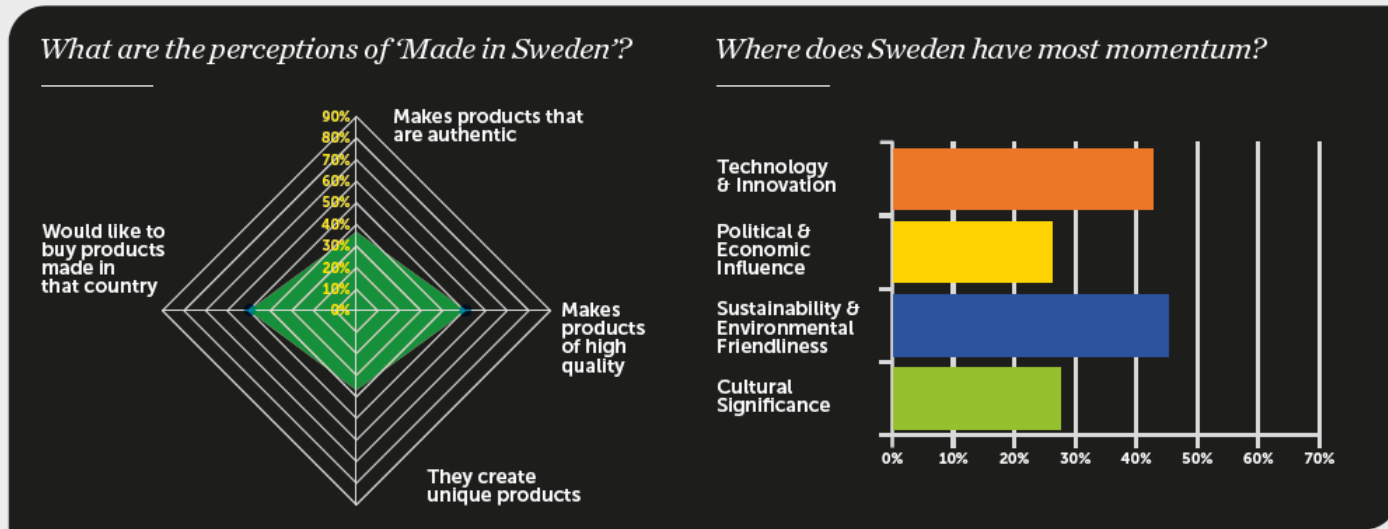
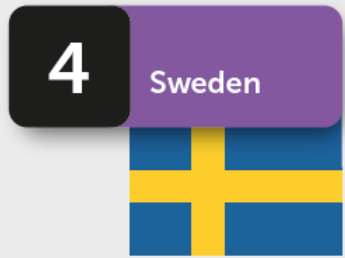
.....
Respondent opinion on Sweden

Free society, tolerant and very friendly people, high social standard.

.....
Respondent opinion on Sweden



Sweden - Summary of perceptions



PERCEPTIONS & BENCHMARKING

SAFFRON BAROMETERS

- Who is Saffron?
- A leading international brand agency

Saffron

PERCEPTIONS & BENCHMARKING

CITY BRAND BAROMETERS

- Europe City Brands
- World City Brands

PERCEPTIONS & BENCHMARKING

MEASUREMENT CRITERIA

Brand Utilisation

- Top 4
- Challengers
- Ones to Watch
- Underperformers

PERCEPTIONS & BENCHMARKING

THE ANALYSIS IS BASED ON TWO COMPONENTS:

1 City Asset Strength

2 City Brand Strength

A combination of both - Brand Utilisation

PERCEPTIONS & BENCHMARKING

1 CITY ASSET STRENGTH

(Asset Score)

- Cultural: Sightseeing & historical attractions
- Cuisine and restaurants
- Good shopping
- Amenity

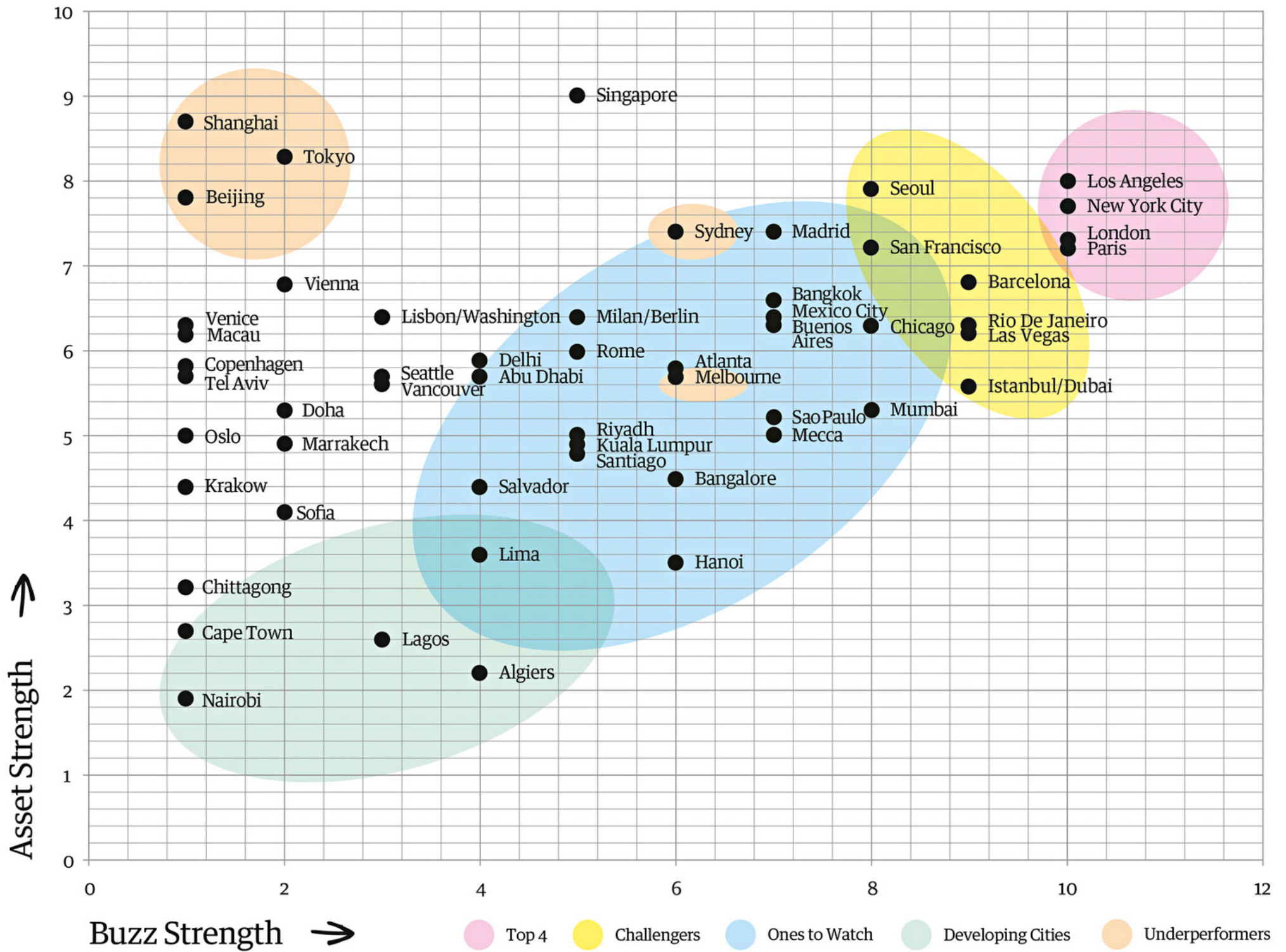
PERCEPTIONS & BENCHMARKING

2 CITY BRAND STRENGTH

(Buzz Score)

City Brand Strength

- Pictorially recognised
- Quantity/strength of positive/attractive qualities
- Conversational value
- Media recognition



PERCEPTIONS & BENCHMARKING

**DID ANYONE KNOW THERE
IS A WORLD CITY MAYOR
ON A MONTHLY BASIS?**



Cities are shaping today's social, cultural, economic and technological agendas. They compete, learn from each other and act together



NEWS & ANALYSIS

One hundred million homeless people own less than one man

News (International): Bill Gates, the world's richest man, owns more than all the homeless people on earth combined. The British charity *Oxfam* recently found that the founder of *Microsoft* was worth US\$76 billion, while, together, the 100 million homeless are estimated to own less than \$3 billion. According to *Oxfam*, the 80 richest billionaires had the same amount of wealth than the bottom 50 per cent of the world's population. [MORE](#)

UN criticises Mexican authorities after beheading of mayoral candidate

News (Mexico): A mayoral candidate from Guerrero, which has been dubbed Mexico's most dangerous state, has been found decapitated four days after she was deducted by members of a drug cartel. Aidé Nava González, whose husband, a former mayor, was shot dead last June, only started campaigning two weeks ago. Ms Nava was the favourite to win the mayoralty of Ahuacutzingo, a post her late husband held. [MORE](#)

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MAYOR OF THE MONTH

Ahmed Aboutaleb Mayor of Rotterdam, Netherlands



When, following the attack on the French satirical magazine *Charlie Hebdo*, the Moroccan-born Mayor of Rotterdam told fellow Muslims in the

Boris Johnson, the Mayor of London, called him his hero and compared him in a newspaper column to Voltaire. "If we are going to win the struggle for the minds of young Muslims, then that is the kind of voice we need to hear - and it needs above all to be a Muslim voice," Johnson wrote. In February 2015 the White House acknowledged Ahmed Aboutaleb as someone who can reach urban Muslims and non-Muslims by inviting him as



PERCEPTIONS & BENCHMARKING

CURRENT MAYOR OF THE MONTH APRIL 2015

CITYMAYORS
MAYORS OF THE MONTH



Park Won-soon, Mayor of Seoul, South Korea

Mayor of the Month for April 2015
Park Won-soon
Mayor of Seoul, South Korea

By Tann vom Hove

16 April 2015: No sooner was Park Won-soon elected Mayor of Seoul in October 2011, than he was touted as a potential presidential contender. In a country where industrial conglomerates and entrenched political parties largely determine who moves to prominence and who remains anonymous, it was an extraordinary achievement for the independent, anti-establishment Park Won-soon to defeat the ruling conservative party's most prominent female member of the South Korean parliament. During his campaign, Park, a human rights-lawyer and philanthropist, coined the phrase of the



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SITE UTILITIES

PERCEPTIONS & BENCHMARKING

MAYOR OF THE MONTH JUNE 2014

Daniel Termont
Ghent, Belgium



PERCEPTIONS & BENCHMARKING

HOW PLACES HAVE USED THE PERCEPTIONS KNOWLEDGE TO THEIR ADVANTAGE

PERCEPTIONS & BENCHMARKING

'GREAT NAMES FOR GREAT BRITAIN' CAMPAIGN

- Visit Britain spent £1.6m
(2.2m Euros, 16.4 m DKK, 20.6 SEK,
16.6m HRK, 9.75m RON)



英国等你来命名



英国之旅终极大奖

Llanfair-pwllgwyn-gyllgo-gery-chwyrn-drobwil-llantysilio-gogo-goch

健肺村

命名人：桥旅

命名理由：这个村子有很长很长的名字，传说那里的居民每次介绍村名的时候，都是一口气说完，因此人人都有一个肺活量大又健康的肺。山明水秀的健肺村是大自然中的天然氧吧，呼吸一口这里的空气，然后一气呵成喊出它的名字将是健康旅行的新标志。

特别评审委员会





大家正在搜: 叶无道h



Home

found

game

Register

Log in

快速注册, 加入微博 ~ mail registration

I guess you are overseas registered user? Click here | China mobile phone number registered

Microblogging account login | QQ login



GREAT BRITAIN

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British Tourist Board official microblogging

+ Follow

Private letter



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Gallery

609 Follow

532,552 Fans

2559 microblogging

微博认证

Lv24

British Tourist Board official microblogging

sectors Tourist Hotel - Other

Profile: Ye call me rotten country, Little Britain, but for me there is always a steady stream of new to refresh your impression of England, stimulate your travel inspiration.

Links VisitBritain online shop VisitBritain official website

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Sticky

"Invincible Bleater" will soon be released in the country strategy! Shaun the Sheep regarded as Britain's most famous sheep now until June 7, plus powder @ VisitBritain @ British Embassy Cultural and Education Section of the Festival @ England

Recently

2015

2014

2013

2012

PERCEPTIONS & BENCHMARKING

VISA POLICY

- Small policy changes make all the difference
- To help the Chinese visitors the UK created a new visa policy to allow quick tourist visits.

PERCEPTIONS & BENCHMARKING

REASONS FOR THE CAMPAIGN

- The Chinese on average spend four times more (£2400 per head) than that of other tourists (about £600 per head)
- For every '22' Chinese tourists supports a job is created in the local economy
- Increase Chinese spend from £500 million to £1 Billion by 2020

KNIGHTSBRIDGE

'STREET OF THE RICH'



CARNABY STREET

'REMEMBERING THE OLD DAYS STREET'



SHOREDITCH

'NOVELTY-SEEKER AREA'



SAVILLE ROW

'TALL, RICH, HANDSOME STREET'



THE SHARD

'THE LONDON CONE'



PERCEPTIONS & BENCHMARKING

EXESIOS FINDINGS

- There is no ‘one size fits all’ solution
- Fantastic diversity
- It is not ‘good practise’ to try and directly copy a project or use a ‘template’ approach

PERCEPTIONS & BENCHMARKING

THE FRENCH... CHINESE SUCCESS

- The Tiens company 20yr celebration holiday

PERCEPTIONS & BENCHMARKING

A HUGE UNDERTAKING

- 141 groups of 46 people (6486 people)
- 84 flights to France
- 79 hotels (4 and 5 star) reserved between Cannes and Monaco, or
- 4,760 rooms booked for 2-5 nights, and
- 146 buses and vehicles for transportation

PERCEPTIONS & BENCHMARKING

A HUGE CONVENTION

- A huge convention was held at the Nikaia with 10 giant screens
- 70 vehicles
- 40 boats
- 5 aircrafts

The visitors spent over £14m euros during their stay...
on top of the actual cost of everything else.



TIENS 天狮

A1 天狮总部办公大楼
Tiens Headquarter Office Building

A2 天狮博物馆
Tiens Museum

A3 洪雷广场
Honglei Plaza

B1 天狮国际宴会中心
Tiens International Banquet Hall

B2 奥蓝际德国际酒店
All-legend International Hotel

B3 奥蓝际德国际酒店西餐厅
All-legend International Hotel Western Restaurant

B4 奥蓝际德酒店公寓
All-legend Service Apartment

B5 泰济生国际健康管理中心
Tai Ji Sun International Health Management Center

B6 奥蓝际德温泉酒店
All-legend Hot Spring Hotel

C1 天狮国际教育培训中心
Tiens International Training Center

C2 天狮产品展示中心
Tiens Product Exhibition Center

C3 天狮研发质检中心
Tiens R&D/Quality Control Center

D1 保健品二车间
NS-2 Nutrition Products Workshop

D2 日化车间
Cosmetics Products Workshop

D3 保健品一车间
NS-1 Nutrition Products Workshop

E1 保健品仓库
Nutrition Products Warehouse

E2 物流仓库
Logistics Warehouse

E3 员工公寓
Staff Apartment

E4 奥蓝际德快捷酒店
All-legend Inn

E5 天狮植物园
Tiens Botanical Garden

E6 后勤楼
Park Management Office

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PERCEPTIONS & BENCHMARKING

USING PERCEPTIONS INSTEAD OF REALITY

STOCKHOLM

PERCEPTIONS & BENCHMARKING

JULIAN STUBBS

Brand consultant leading
the Stockholm rebranding
process





Stockholm

The Capital of Scandinavia

PERCEPTIONS & BENCHMARKING

IDEA OF PERCEPTIONS

- ‘Stockholm Capital of Scandinavia’
- ‘Bold, simple and a little provocative’
- In the past the region was thought of as the ‘Venice of the North’ although Stubbs didn’t like the idea of being a “second” class anything let alone a city!!

PERCEPTIONS & BENCHMARKING

OTHER VENICES OF THE NORTH

- Amsterdam
- Bruges
- Copenhagen
- Giethoorn
- Hamburg
- Henningsvær
- Manchester
- 's-Hertogenbosch
- Saint Petersburg
- Stockholm

THE STRATEGICAL CASE STUDY / THE RIVALRY OF VENICE

“Venice of the North?”



the Amster
fundamen
ond rate Venic
competing with other
Not a great positioning.
Whatever you are going
it simple and make i

PERCEPTIONS & BENCHMARKING

**THE DIFFERENCE
BETWEEN
PERCEPTIONS
AND REALITY...
CAN LEAD TO A
'BRAND GAP'**

PERCEPTIONS & BENCHMARKING

ENGLISH EAT ONLY



PERCEPTIONS & BENCHMARKING

ENGLISH=ROSTBIFFS!!!





PERCEPTIONS & BENCHMARKING

FRENCH=FROGS/FROGSLEGS

PERCEPTIONS & BENCHMARKING

IT IS THE JOB OF PLACE BRAND PRACTITIONERS TO CLOSE THIS GAP BY MAKING SURE COMMUNICATIONS SHOW THE REALITY AND NOT JUST A 'FAIRY TALE'

PERCEPTIONS & BENCHMARKING

WHEN THE PLACE AND DESTINATION BRAND FIGHT

- The Fehmarnbelt case



Copenhagen

Great Belt

DENMARK

Oresund

Malmö

Baltic Sea

Kiel

Fehmarn

planned tunnel

GERMANY

Lübeck

Hamburg

100 km

DER SPIEGEL



THE FEHMARNBELT CASE

- Due to no cohesive communications/strategy different stakeholders had varying views of the project
- The Danes' interest was tourism and nature
- The Germans and Swedes associated the region with cross-border cooperation and connection

PERCEPTIONS & BENCHMARKING

THE FEHMARNBELT CASE

- Initial perception conflicted with reality
- After the consultation process all parties associated the tunnel with connection

PERCEPTIONS & BENCHMARKING

THE FEHMARNBELT CASE

This illustrates the gap in perceptions of the three countries concerned and the need for understanding before a project take place so that a 'core' understanding is formed from the outset.

PERCEPTIONS & BENCHMARKING

CONCLUSION

**FOR A SUCCESSFUL
BRAND PROCESS
PERCEPTIONS HAVE TO
MATCH REALITY**