



2016 Country RepTrak®

The Most Reputable Countries in the World

June 23, 2016

Agenda

- Country Reputation Management Intro
- 2016 Country RepTrak® Results
- Country Learning and Trends
- The Importance of Country Reputation

Country reputation drives key stakeholder support

As in the case of companies, **countries also have their own reputation** which has an impact their performance.

MORE TOURISM



MORE FDI



BETTER DIPLOMACY



BETTER EXPORTS



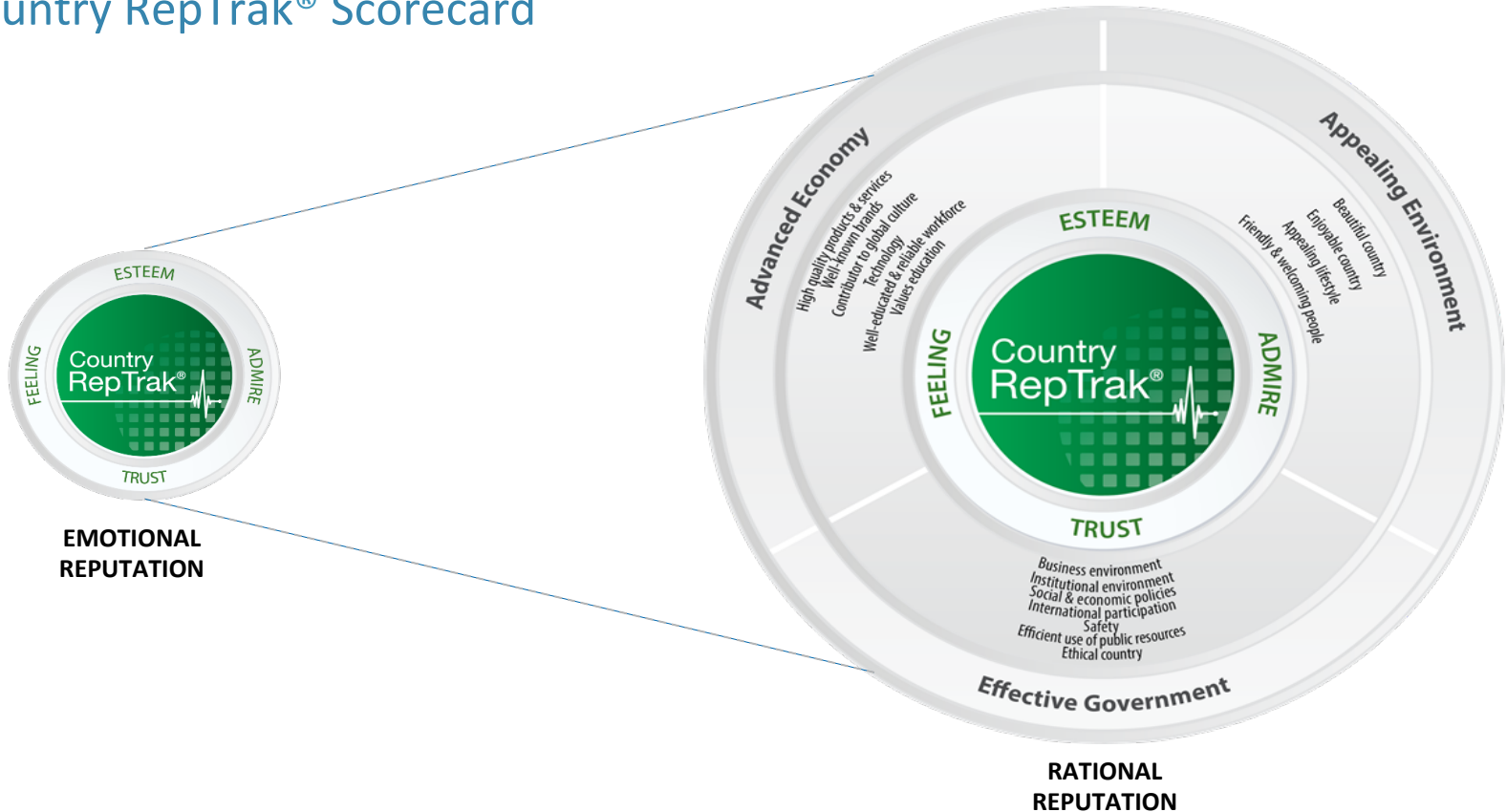
MORE FOREIGN TALENT



...which ultimately drives value creation

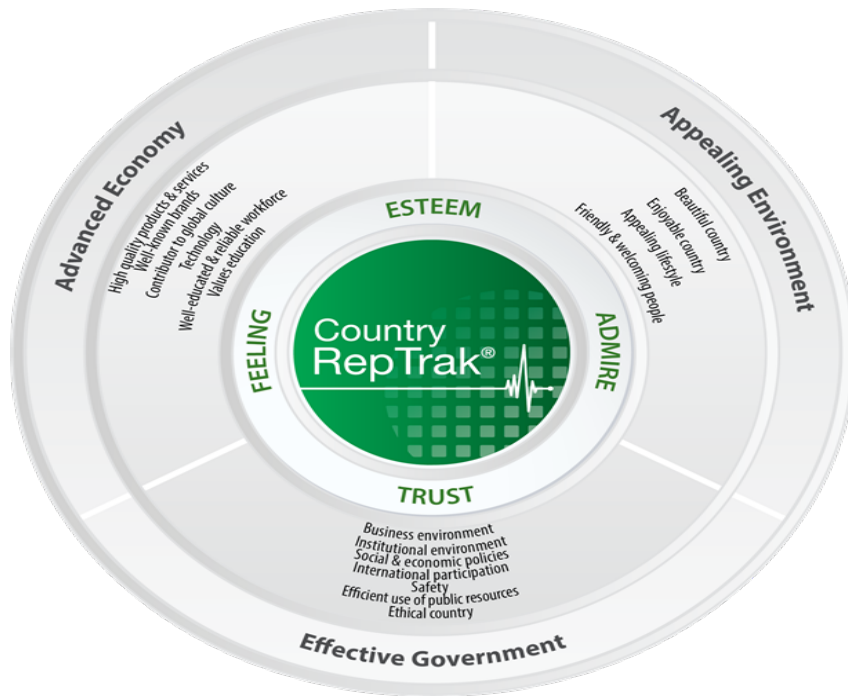


The Country RepTrak® Scorecard



Country RepTrak® Model: Reputation & Value Creation

Having a strong reputation **improves support**. An increasingly globalized world with intensified competition makes country reputations matter more than ever. Attracting **FDI, tourists, high skilled workforce** and being able to **sell the products of the country abroad** are facilitated by having a strong country reputation. This model shows the correlation between supportive behaviors and external reputation overall for 2016.



I would recommend **visiting** the country

I would recommend **living** in the country

I would recommend **working** in the country

I would recommend **investing** in the country

I would recommend **buying** products/services originating from the country

I would recommend **studying** in the country

I would **attend** to an event

The 2016 Country RepTrak®

Stakeholder Group (Target)

- G8 general public balanced to the country population on age and gender and controlled for region
- People who were “somewhat” or “very” familiar were allowed to rate a country.

Country Selection:

- Largest gross domestic products (public release)
- Largest populations
- Countries selected due to relevant events
- Countries all have to be visible among the general public in order to be able to rate them

Data Collection Method:

- CAWI (online interviews).

Sample:

- More than 58,000 ratings collected in Q1 2016













Reputation Institute

2016 Country RepTrak® Results

Top 10 Countries in the World








| Rank | Country | RepTrak® Pulse Score |
|------|---|----------------------|
| 1 | SWEDEN  | 78.3 |
| 2 | CANADA  | 77.8 |
| 3 | SWITZERLAND  | 77.0 |
| 4 | AUSTRALIA  | 76.8 |
| 5 | NORWAY  | 76.2 |
| 6 | FINLAND  | 75.2 |
| 7 | NEW ZEALAND  | 74.7 |
| 8 | DENMARK  | 74.3 |
| 9 | IRELAND  | 74.1 |
| 10 | NETHERLANDS  | 73.9 |



- Sweden ranks first in 2016
- Even though it ranks first, Sweden is on par with Canada and Switzerland as countries with best reputation
- 7 of the top 10 countries are in Western Europe, 2 in Australia/New Zealand region, and 1 in North America
- What do these countries have in common? They are on the top lists for happiest countries, peaceful and socially progressive (same sex marriage, best education, healthcare)

Normative Scale

| | | |
|---|---------------------|---------------|
|  | Excellent/ Top Tier | 80+ |
|  | Strong/ Robust | 70-79 |
|  | Avg./ Moderate | 60-69 |
|  | Weak/ Vulnerable | 40-59 |
|  | Poor/ Lowest Tier | <40 |

Top 10 Countries Overtime (2014-2016)

| Rank | 2016 | 2015 | 2014 |
|------|--------------------|--------------------|--------------------|
| 1 | SWEDEN ↑ | CANADA | SWITZERLAND |
| 2 | CANADA | NORWAY | CANADA |
| 3 | SWITZERLAND | SWEDEN | SWEDEN |
| 4 | AUSTRALIA | SWITZERLAND | FINLAND |
| 5 | NORWAY | AUSTRALIA | AUSTRALIA |
| 6 | FINLAND | FINLAND | NORWAY |
| 7 | NEW ZEALAND | NEW ZEALAND | DENMARK |
| 8 | DENMARK | DENMARK | NEW ZEALAND |
| 9 | IRELAND ↑ | NETHERLANDS | NETHERLANDS |
| 10 | NETHERLANDS | BELGIUM | GERMANY |



- The top 10 country list is stable since 2015
- Only countries that had a significant impact are Sweden with a 1.7 point jump and Ireland with a 2.1 point jump
- Ireland is a new country on the list, while Belgium dropped from the Top 10 list and dropped 4 points overall
- Why is Sweden #1?
- A great place for families with 16 months of parental leave and free day care services
- Invests in green living
- Favorable economic growth
- A safe country for women
- High transparency in the media
- Beautiful nature and fresh air



Only 14 Countries have a Strong Reputation, and 50 Countries have a Weak or Poor Reputation

| Rank | Country | 2016 RepTrak® Pulse |
|------|----------------|---------------------|
| 1 | Sweden | 78.34 |
| 2 | Canada | 77.82 |
| 3 | Switzerland | 77.00 |
| 4 | Australia | 76.84 |
| 5 | Norway | 76.18 |
| 6 | Finland | 75.16 |
| 7 | New Zealand | 74.68 |
| 8 | Denmark | 74.25 |
| 9 | Ireland | 74.11 |
| 10 | Netherlands | 73.90 |
| 11 | Austria | 72.44 |
| 12 | Italy | 71.68 |
| 13 | United Kingdom | 71.08 |
| 14 | Japan | 70.97 |
| 15 | France | 69.32 |
| 16 | Belgium | 67.95 |
| 17 | Spain | 67.73 |
| 18 | Germany | 67.55 |
| 19 | Portugal | 66.53 |
| 20 | Singapore | 60.12 |
| 21 | Czech Republic | 58.73 |
| 22 | Costa Rica | 58.60 |
| 23 | Peru | 58.56 |
| 24 | Brazil | 57.75 |
| 25 | Taiwan | 57.69 |

| Rank | Country | 2016 RepTrak® Pulse |
|------|--------------------------|---------------------|
| 26 | Thailand | 57.00 |
| 27 | Poland | 56.71 |
| 28 | United States of America | 56.32 |
| 29 | Argentina | 55.66 |
| 30 | Dominican Republic | 55.33 |
| 31 | Malaysia | 55.17 |
| 32 | Philippines | 55.04 |
| 33 | Puerto Rico | 54.55 |
| 34 | Chile | 54.55 |
| 35 | Panama | 53.87 |
| 36 | Paraguay | 53.59 |
| 37 | Indonesia | 53.43 |
| 38 | Cuba | 52.11 |
| 39 | Morocco | 51.99 |
| 40 | Greece | 51.51 |
| 41 | Venezuela | 50.64 |
| 42 | Ecuador | 50.63 |
| 43 | Mexico | 50.33 |
| 44 | India | 50.29 |
| 45 | South Korea | 50.28 |
| 46 | United Arab Emirates | 50.27 |
| 47 | Bolivia | 49.86 |
| 48 | Uruguay | 49.57 |
| 49 | South Africa | 49.21 |
| 50 | Guatemala | 48.66 |

Normative Scale

| | |
|---------------------|-------|
| Excellent/ Top Tier | 80+ |
| Strong/ Robust | 70-79 |
| Avg./ Moderate | 60-69 |
| Weak/ Vulnerable | 40-59 |
| Poor/ Lowest Tier | <40 |

All RepTrak® Pulse scores that differ by more than +/- 1.4 are significantly different at the 95% confidence level

The Countries with Weak and Poor Reputation are the ones that are under a dictatorship or in a state of instability

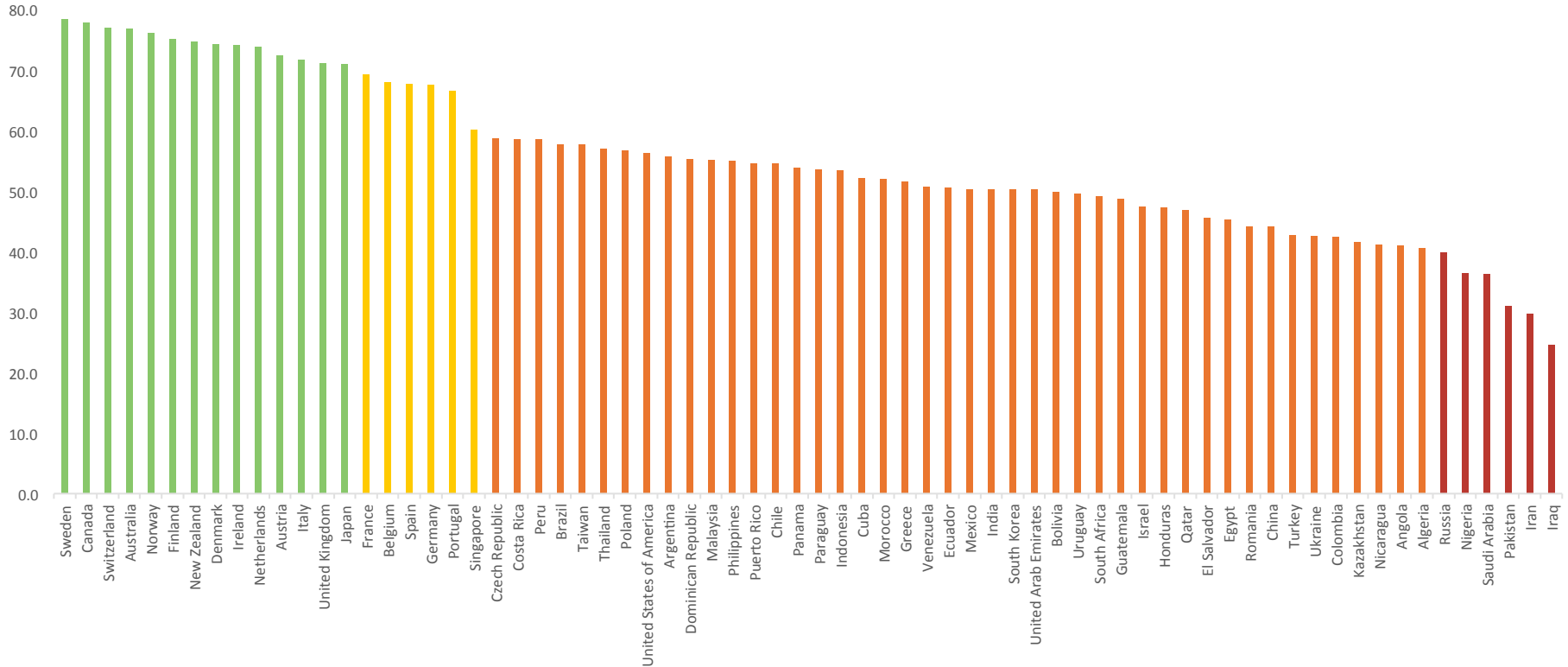
| Rank | Country | 2016 RepTrak® Pulse |
|------|--------------|---------------------|
| 51 | Israel | 47.43 |
| 52 | Honduras | 47.30 |
| 53 | Qatar | 46.87 |
| 54 | El Salvador | 45.57 |
| 55 | Egypt | 45.22 |
| 56 | Romania | 44.11 |
| 57 | China | 44.08 |
| 58 | Turkey | 42.73 |
| 59 | Ukraine | 42.54 |
| 60 | Colombia | 42.46 |
| 61 | Kazakhstan | 41.58 |
| 62 | Nicaragua | 41.08 |
| 63 | Angola | 40.95 |
| 64 | Algeria | 40.52 |
| 65 | Russia | 39.82 |
| 66 | Nigeria | 36.37 |
| 67 | Saudi Arabia | 36.32 |
| 68 | Pakistan | 31.03 |
| 69 | Iran | 29.74 |
| 70 | Iraq | 24.56 |



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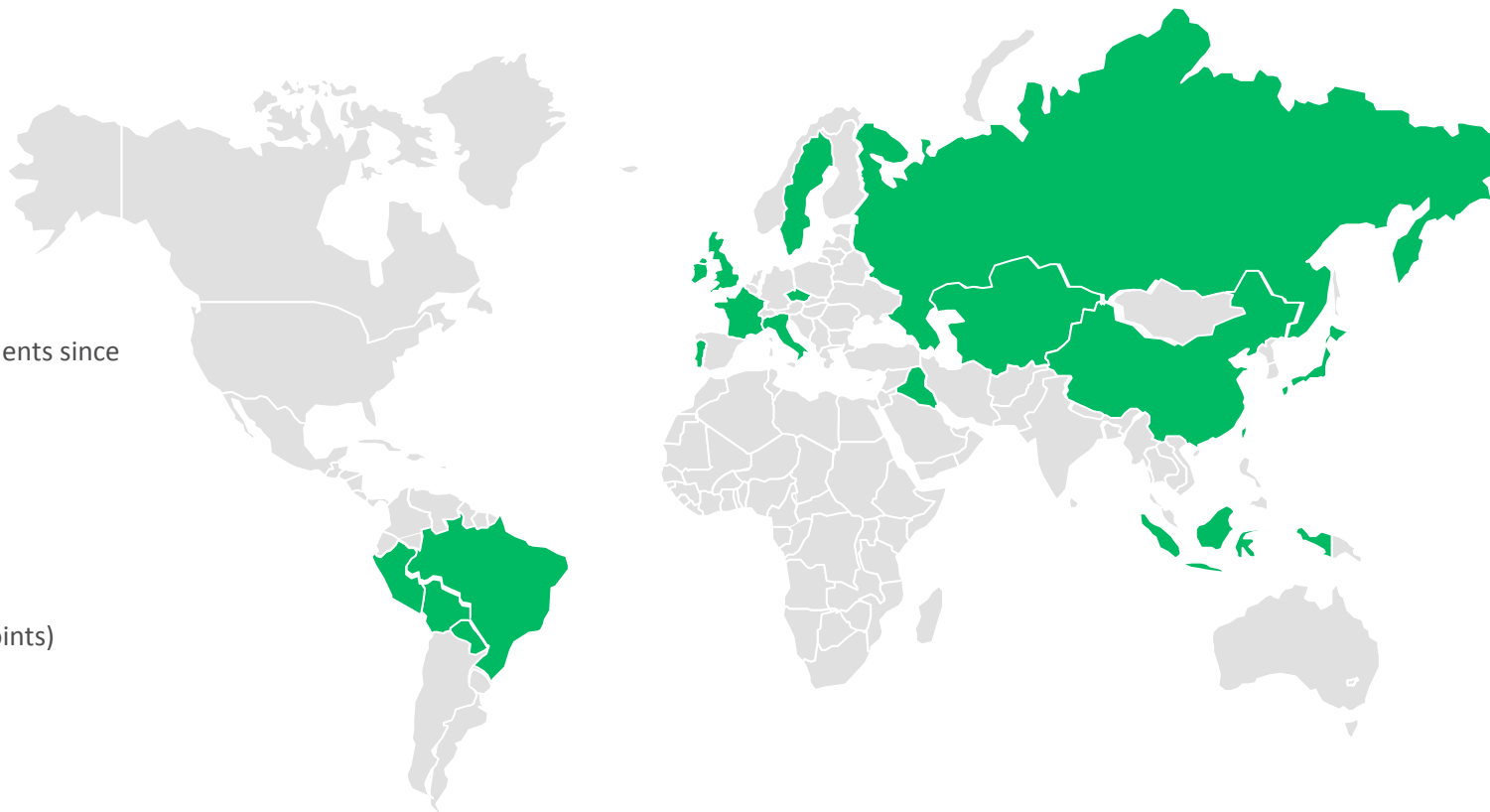
71% of countries studied have a below average reputation



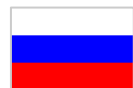
Since 2015, France's Reputation Sees the Largest Jump

Largest Reputation Improvements since 2015:

- France (+4.9 points)
- Russia (+4.7 points)
- Peru (+2.9 points)
- Bolivia (+2.3 points)
- Italy (+2.3 points)
- Czech Republic (+2.2 points)
- Portugal (+2.2 points)
- Paraguay (+2.1 points)
- Ireland (+2.1 points)
- Iraq (+2.1 points)



Emerging Markets such as Russia, China India and Turkey View Their Reputation to be Higher than it is perceived Externally



RUSSIA

External Reputation



+41.0

Participant in the global economy
Contributor to global culture
Beautiful country

Self-Image Reputation



CHINA

External Reputation



+32.3

Participant in the global economy
Safe place
Appealing lifestyle

Self-Image Reputation



INDIA

External Reputation



+31.3

Appealing lifestyle
Adopts progressive social and
economic policies
A safe place

Self-Image Reputation



TURKEY

External Reputation



+ 28.7

Safe place
Well known brands
People are friendly & welcoming

Self-Image Reputation



- External respondents see Russia, China and India as lacking the global aspect as well as safety
- For Turkey, safety is an issue too as well as presenting itself as a welcoming country
- Another country that also has a large gap between its self and external image is the US
 - Externally the US is seen to lack in safety, appealing lifestyle and being a responsible participant in the global community

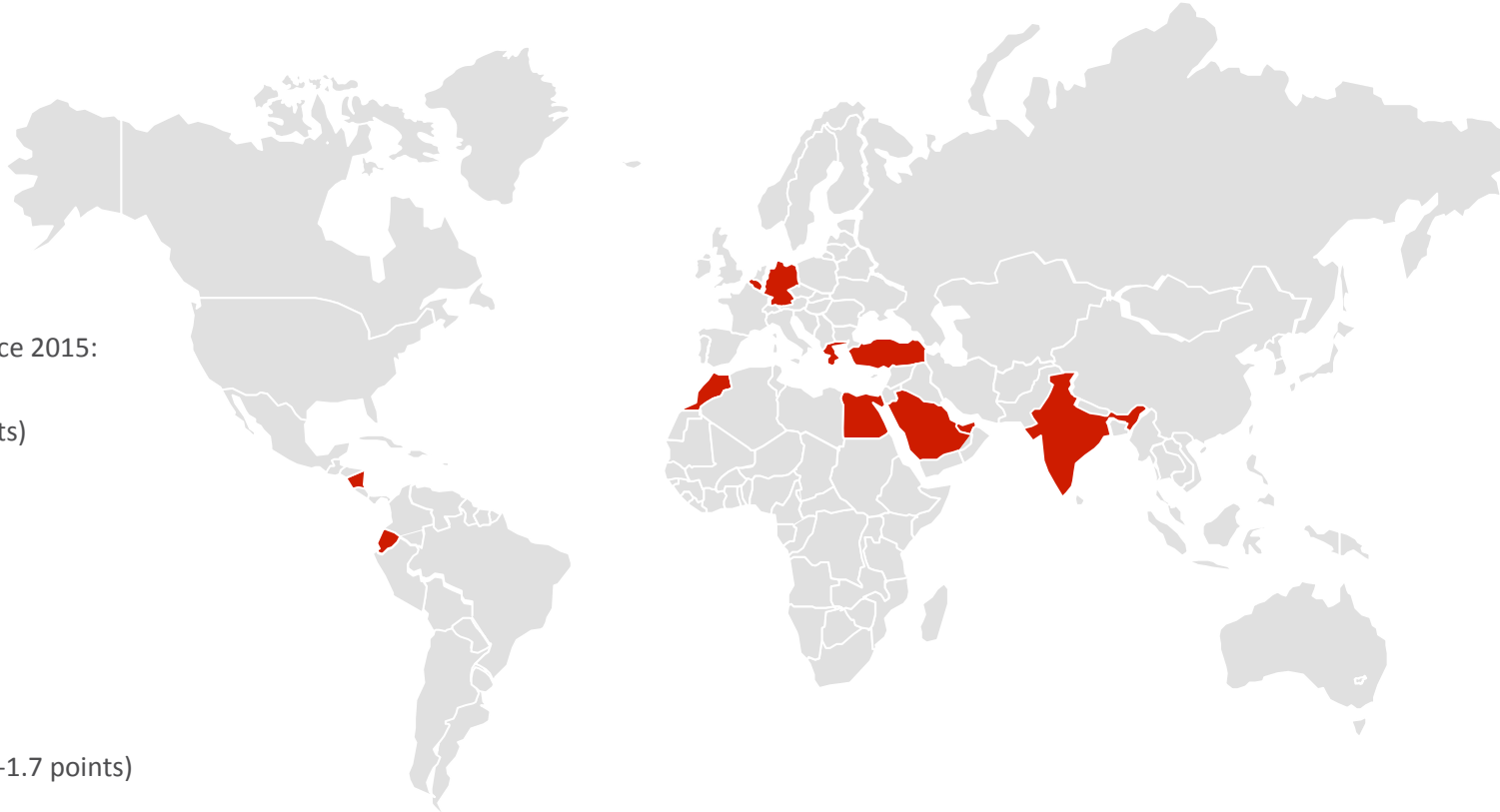
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| Strong/ Robust | 70-79 |
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| Weak/ Vulnerable | 40-59 |
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Since 2015, Turkey saw a 7 point Drop in Reputation

Largest Reputation Drops since 2015:

- Turkey (-7.0 points)
- Saudi Arabia (-4.7 points)
- Belgium (-4.3 points)
- Greece (-3.9 points)
- Nicaragua (-3.7 points)
- Egypt (-3.4 points)
- India (-2.4 points)
- Ecuador (-1.9 points)
- Morocco (-1.7 points)
- United Arab Emirates (-1.7 points)
- Germany (-1.4 points)



On the other Hand, South Africa, Italy and Brazil View Their Reputation to be Lower than it is perceived Externally



S. AFRICA

External Reputation



- 20.0

Run by an efficient government
Ethical country with transparency
Operates efficiently

Self-Image Reputation



ITALY

External Reputation



- 14.6

Operates efficiently
Progressive economic & social policies
Favorable environment for business

Self-Image Reputation



BRAZIL

External Reputation



- 10.2

Operates efficiently
Efficient government
Ethical country with transparency

Self-Image Reputation



- External respondents give these tourist destinations the benefit of the doubt when it comes to efficient government and transparency; however, South Africans, Italians and Brazilians rate their respective country's reputation as much lower than it is perceived by outsiders

Normative Scale

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|---------------------|-------|
| Excellent/ Top Tier | 80+ |
| Strong/ Robust | 70-79 |
| Avg./ Moderate | 60-69 |
| Weak/ Vulnerable | 40-59 |
| Poor/ Lowest Tier | <40 |

Largest and most powerful countries don't earn best reputations...

| Rank | POPULATION | GDP |
|------|------------|---------|
| 1 | CHINA | USA |
| 2 | INDIA | CHINA |
| 3 | USA | JAPAN |
| 4 | INDONESIA | GERMANY |
| 5 | BRAZIL | UK |
| 6 | PAKISTAN | FRANCE |
| 7 | NIGERIA | INDIA |
| 8 | BANGLADESH | ITALY |
| 9 | RUSSIA | BRAZIL |
| 10 | MEXICO | CANADA |

BLUE: In the Top 10 by Reputation

...but they are the Happiest, most Peaceful and least Corrupted countries

| Rank | HAPPINESS | PEACE INDEX | LEAST CORRUPT |
|------|-------------|----------------|---------------|
| 1 | DENMARK | ICELAND | DENMARK |
| 2 | SWITZERLAND | DENMARK | FINLAND |
| 3 | ICELAND | AUSTRIA | SWEDEN |
| 4 | NORWAY | NEW ZEALAND | NEW ZEALAND |
| 5 | FINLAND | SWITZERLAND | NETHERLANDS |
| 6 | CANADA | FINLAND | NORWAY |
| 7 | NETHERLANDS | CANADA | SWITZERLAND |
| 8 | NEW ZEALAND | JAPAN | SINGAPORE |
| 9 | AUSTRALIA | AUSTRALIA | CANADA |
| 10 | SWEDEN | CZECH REPUBLIC | GERMANY |



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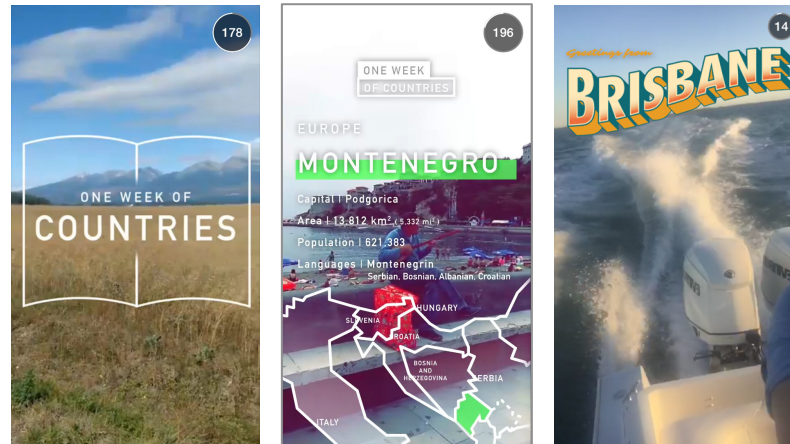
What Drives Country Reputation?

Country Brand: The Way a Country is Branded is Faster and Global

YESTERDAY



TODAY



Snapchat's Country Stories allow Snapchat users to define and 'brand' a country and cities within the country.

- Countries are investing more and more in attracting stakeholders
 - Qatar World Cup
 - Dubai Expo 2020
 - Brazil Summer Olympics
- Country Brand Challenge – having a consistent story and communication

Countries' Reputations take a long time to build but can drop in an instant



CANADA FEARS PHOTO OF PRIME MINISTER WITH PANDAS COULD WORSEN AMERICAN REFUGEE CRISIS



By Andy Borowitz, MARCH 7, 2016



February 17, 2016

Military convoy attack in Ankara

29 dead, 60 injured

Military buses were the target of this attack by the Kurdistan Freedom Falcons (TAK) in the Turkish capital close to military headquarters.

March 13, 2016

Bus stop bombing in Ankara

37 dead, 125 injured

Less than four weeks after the last attack, Ankara was hit by another car bombing, this time by a busy transit hub close to a park and administrative buildings. TAK claimed responsibility.

March 19, 2016

Istanbul blast on popular street

5 dead, 36 injured

A suicide bomber hit one of the city's most popular shopping streets filled with cafes, restaurants and foreign consulates. Officials said either the PKK or ISIL were to blame.

April 27, 2016

Female suicide bomber attacks city of Bursa

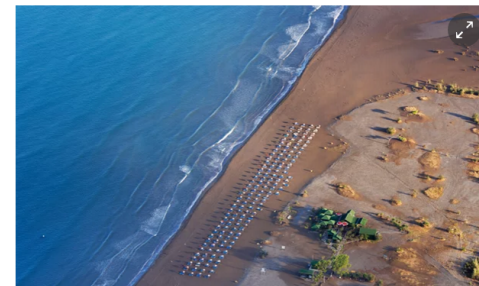
13 injured

A suicide bomber blew herself up near Bursa's 14th century Grand Mosque, a historic symbol of the city that was the first capital of the Ottoman empire.



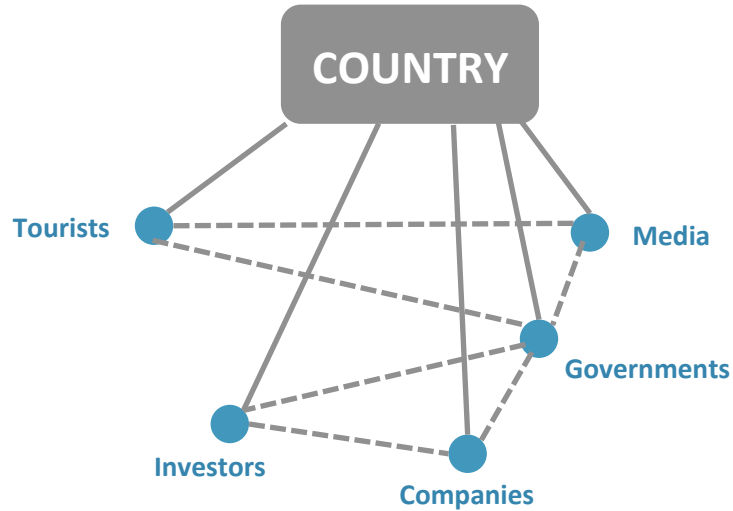
Turkey's tourism industry counts cost of unrest as holiday bookings fall by 50%

Summer holiday bookings to Turkey have been significantly affected following a spate of recent attacks as holiday companies shift their focus to other Mediterranean countries

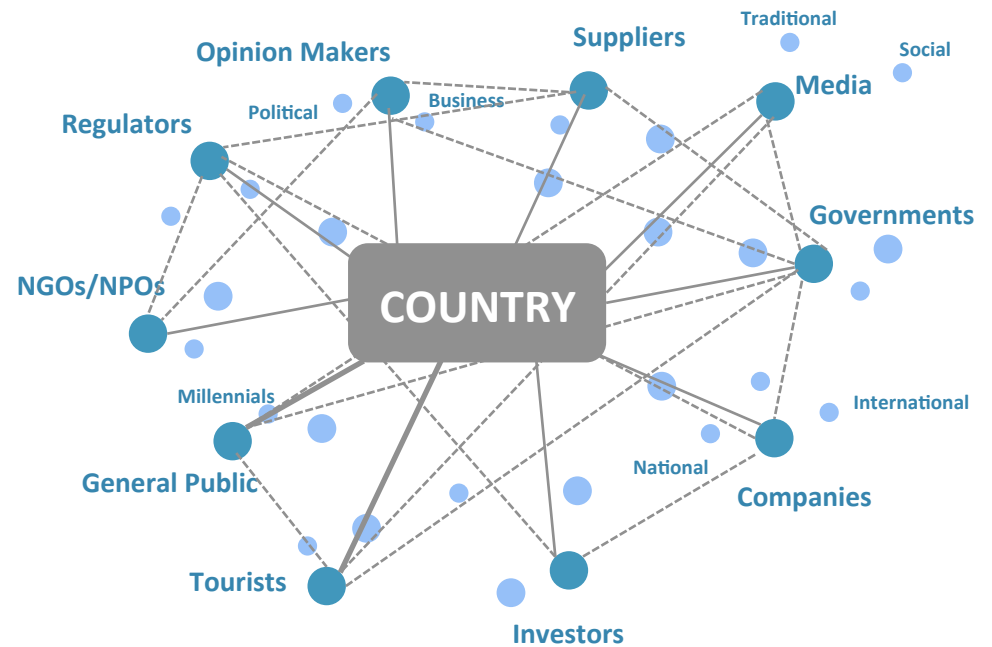


Which Means More Opinions and More Stakeholders

2005

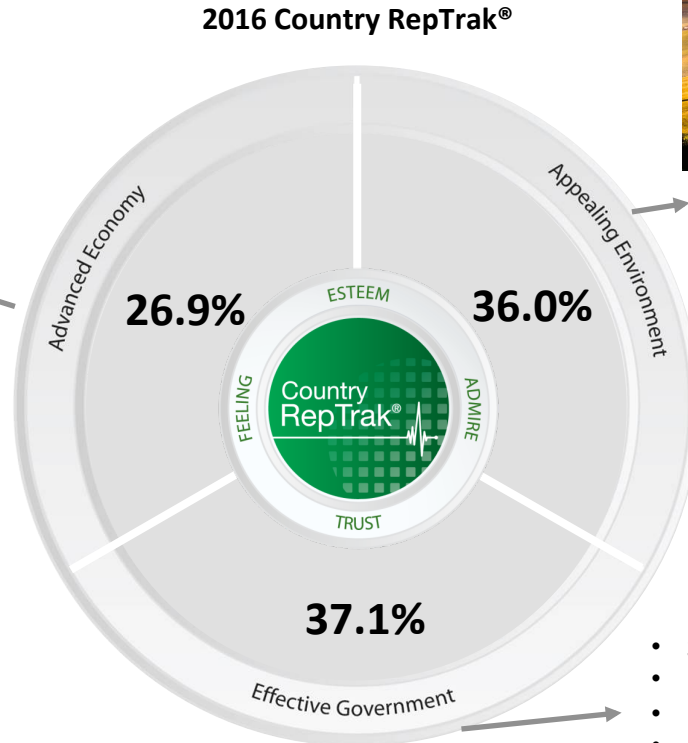


2016



Key Drivers of Reputation

- Contributor to global culture
- High quality products & services
- Well-educated and reliable workforce
- Well-known brands
- Values education
- Technologically advanced



Adj R² = 0.680
N = 58,822



- Friendly and welcoming
- Beautiful country
- Appealing lifestyle
- Enjoyable country



- Safe place
- Ethical country
- Responsible participant in the global community
- Effective government
- Progressive social and economic policies
- Operates efficiently
- Favorable environment for business

The Countries with Best Reputation are Leaders in Effective Government, Appealing Environment and Advanced Economy

| RANK | EFFECTIVE GOVERNMENT | SCORE |
|------|----------------------|-------|
| 1 | SWEDEN | 76.8 |
| 2 | SWITZERLAND | 75.6 |
| 3 | NORWAY | 75.1 |
| 4 | FINLAND | 74.6 |
| 5 | CANADA | 74.4 |
| 6 | DENMARK | 73.6 |
| 7 | NETHERLANDS | 72.7 |
| 8 | AUSTRALIA | 71.6 |
| 9 | AUSTRIA | 71.2 |
| 10 | NEW ZEALAND | 70.7 |

| RANK | APPEALING ENVIROMENT | SCORE |
|------|----------------------|-------|
| 1 | CANADA | 80.2 |
| 2 | SWEDEN | 79.4 |
| 3 | ITALY | 79.1 |
| 4 | AUSTRALIA | 78.5 |
| 5 | NORWAY | 78.2 |
| 6 | SWITZERLAND | 78.1 |
| 7 | IRELAND | 77.4 |
| 8 | FINLAND | 77.1 |
| 9 | NEW ZEALAND | 77.0 |
| 10 | NETHERLANDS | 76.0 |

| RANK | ADVANCED ECONOMY | SCORE |
|------|------------------|-------|
| 1 | JAPAN | 77.8 |
| 2 | SWEDEN | 76.7 |
| 3 | SWITZERLAND | 75.0 |
| 4 | GERMANY | 73.5 |
| 5 | FRANCE | 72.9 |
| 6 | CANADA | 72.8 |
| 7 | NORWAY | 72.6 |
| 8 | UK | 72.0 |
| 9 | NETHERLANDS | 71.8 |
| 10 | FINLAND | 71.7 |

Being welcoming, safe and beautiful are the top 3 drivers of a country's reputation

EFFECTIVE GOVERNMENT 37.1%



| ATTRIBUTE | WEIGHT |
|---|-------------|
| Safe place | 7.1% |
| Ethical country | 6.4% |
| Responsible participant in the global community | 6.4% |
| Effective government | 6.1% |
| Progressive social and economic policies | 6.1% |
| Operates efficiently | 5.7% |
| Favorable environment for business | 5.2% |



APPEALING ENVIROMENT 36.0%



| ATTRIBUTE | WEIGHT |
|-------------------------------|-------------|
| Friendly and welcoming | 7.3% |
| Beautiful country | 6.9% |
| Appealing lifestyle | 6.6% |
| Enjoyable country | 6.5% |



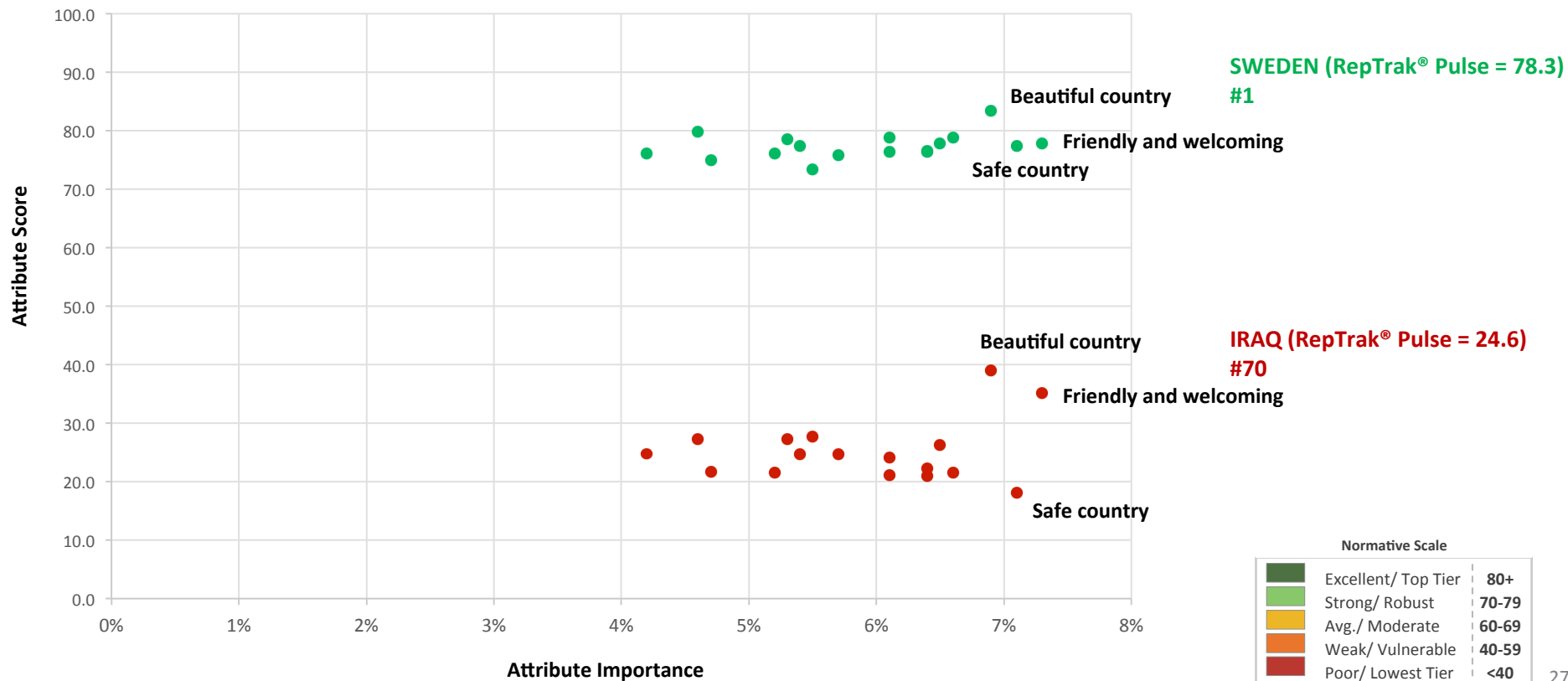
ADVANCED ECONOMY 26.9%



| ATTRIBUTE | WEIGHT |
|--------------------------------------|--------|
| Contributor to global culture | 5.5% |
| High quality products & services | 5.4% |
| Well-educated and reliable workforce | 5.3% |
| Well-known brands | 4.7% |
| Values education | 4.6% |
| Technologically advanced | 4.2% |



Sweden has strong scores for all attributes ; Iraq's lowest score is in a key driver – safe country



Latin American, Australasia and South European Countries have a Higher Reputation than their Attributes' score ; the opposite is true for the Persian Gulf, USA, Turkey and East Asia

EMOTIONAL HALO

| COUNTRY | 2016 REPTRAK® PULSE | ATTRIBUTE SCORE | Δ between pulse and attribute score |
|--------------------|---------------------|-----------------|-------------------------------------|
| PERU | 58.6 | 53.6 | + 4.9 |
| AUSTRALIA | 76.8 | 72.5 | +4.3 |
| CUBA | 52.1 | 48.4 | +3.8 |
| NEW ZEALAND | 74.7 | 71.0 | +3.7 |
| IRELAND | 74.1 | 71.0 | +3.1 |
| PORTUGAL | 66.5 | 63.5 | +3.1 |
| ITALY | 71.7 | 68.8 | +2.9 |
| BRAZIL | 57.8 | 54.9 | +2.8 |
| DOMINICAN REPUBLIC | 55.3 | 52.6 | +2.8 |
| THAILAND | 57.0 | 54.2 | +2.8 |

EMOTIONAL DISCONNECT

| COUNTRY | 2016 REPTRAK® PULSE | ATTRIBUTE SCORE | Δ between pulse and attribute score |
|----------------------|---------------------|-----------------|-------------------------------------|
| USA | 56.3 | 64.2 | -7.9 |
| SAUDI ARABIA | 36.3 | 43.1 | -6.8 |
| RUSSIA | 39.8 | 46.0 | -6.2 |
| CHINA | 44.1 | 50.0 | -5.9 |
| SOUTH KOREA | 50.1 | 55.1 | -4.8 |
| UNITED ARAB EMIRATES | 50.3 | 53.8 | -3.5 |
| TURKEY | 42.7 | 46.2 | -3.4 |
| QATAR | 46.9 | 50.3 | -3.4 |
| IRAN | 29.7 | 32.8 | -3.1 |
| GERMANY | 67.6 | 70.4 | -2.8 |

Reputation Institute

2016 Country RepTrak® Results - Attributes

In 2016, Safety, the Second Important Attribute; is the Attribute that Moves the Reputation Needle

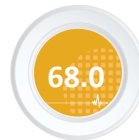


BELGIUM

2015 Reputation



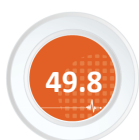
2016 Reputation



-4.3

| Year | Country is a SAFE PLACE | VISIT Country | LIVE in Country |
|------|-------------------------|---------------|-----------------|
| 2016 | 65.2 | 69.2 | 66.8 |
| Δ | -8.1 | -5.0 | - 4.7 |
| 2015 | 73.3 | 74.2 | 62.1 |

2015 Reputation



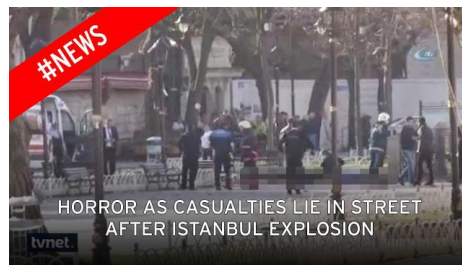
2016 Reputation



-7.0

| Year | Country is a SAFE PLACE | VISIT Country | LIVE in Country |
|------|-------------------------|---------------|-----------------|
| 2016 | 37.3 | 49.7 | 35.3 |
| Δ | -8.4 | -7.4 | - 4.1 |
| 2015 | 45.7 | 57.1 | 39.5 |

TURKEY



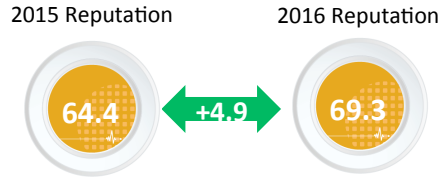
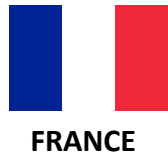
- Belgium's reputation dropped by 4 points in 2016, and the biggest drop being in the safety attribute
 - Brussel's terrorist attack presents the city as unsafe and has an umbrella effect to the whole country
- A similar case is Turkey where there were two major bombings in Istanbul, one in January and a second one in March

Normative Scale

| | |
|---------------------|-------|
| Excellent/ Top Tier | 80+ |
| Strong/ Robust | 70-79 |
| Avg./ Moderate | 60-69 |
| Weak/ Vulnerable | 40-59 |
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All RepTrak® Pulse scores that differ by more than +/- 1.4 are significantly different at the 95% confidence level
Attribute scores that differ by more than +/- 2.9 are significantly different at the 95% confidence level

In the case of France, the Emotional Trumps the Decline in Safety After the Paris Attacks



| Year | Country is a SAFE PLACE | VISIT Country | LIVE in Country |
|----------|-------------------------|---------------|-----------------|
| 2016 | 59.0 | 75.6 | 64.7 |
| Δ | -4.1 | +1.0 | +3.3 |
| 2015 | 64.1 | 74.5 | 61.4 |

- Despite the fact that France experienced a 4 point drop in the safety attribute, France's reputation and respondents' willingness to visit and live in the country increased since 2015



A sense of unity after the Charlie Hebdo shootings and Paris attacks

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| | |
|---------------------|-------|
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Attribute scores that differ by more than +/- 2.9 are significantly different at the 95% confidence level

Reputation Institute

The Importance of Country Reputation

Places benefit from a strong reputation....

Countries have **reputations** which drives their performance.

More **tourists**



Attract **foreign investment**



Increase **exports**



Improve **public diplomacy**



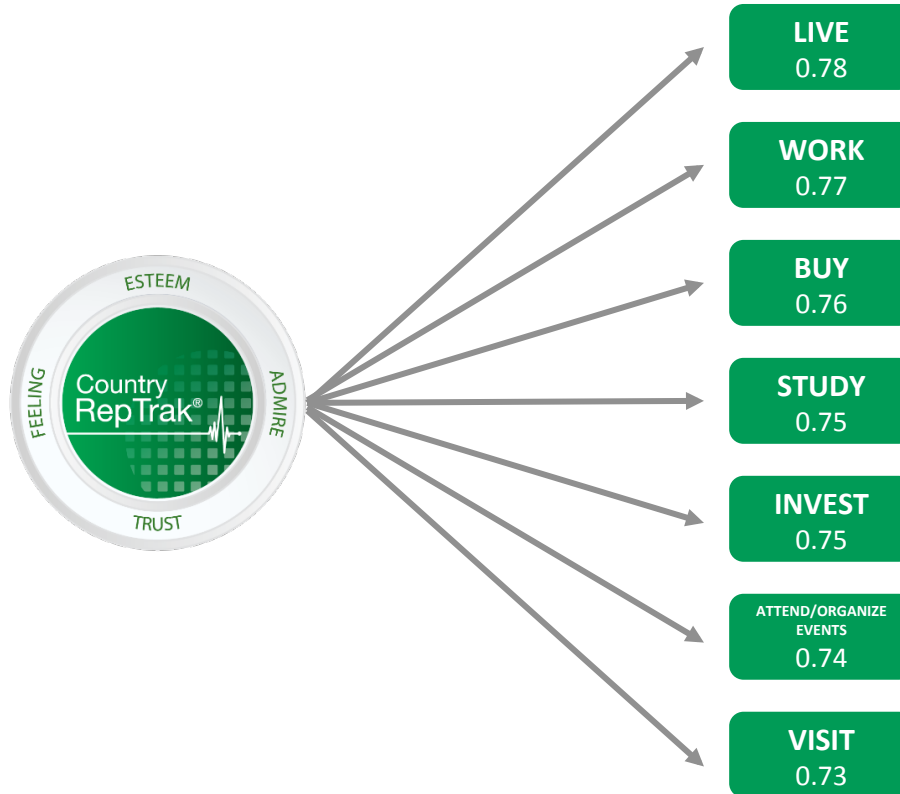
Attract **knowledge & talent**



Strong reputation leads to support from various stakeholders



Value Creation: Relationship between Reputation and Declared Intentions

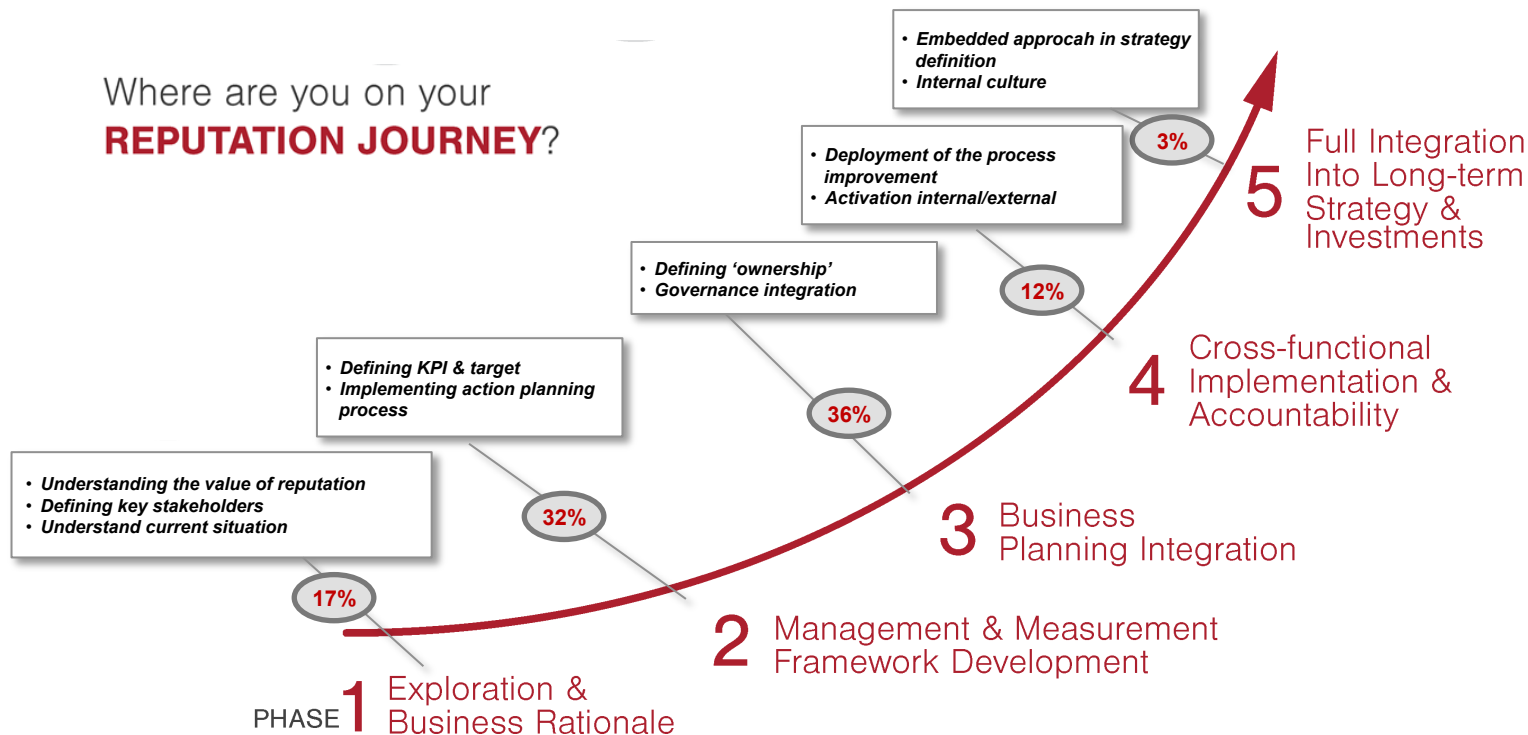


The Top 10 Countries in Reputation are the ones that are getting the Top Support

| RANK | VISIT | INVEST | LIVE | WORK | BUY | STUDY | ATTEND/ORGANIZE EVENT |
|------|-------------|-------------|-------------|----------------|-------------|----------------|--------------------------|
| 1 | CANADA | SWITZERLAND | SWITZERLAND | SWITZERLAND | SWITZERLAND | CANADA | SWITZERLAND |
| 2 | SWEDEN | SWEDEN | CANADA | CANADA | SWEDEN | UNITED KINGDOM | CANADA |
| 3 | SWITZERLAND | CANADA | SWEDEN | SWEDEN | JAPAN | SWITZERLAND | SWEDEN |
| 4 | ITALY | FINLAND | AUSTRALIA | AUSTRALIA | CANADA | SWEDEN | DENMARK |
| 5 | AUSTRALIA | JAPAN | DENMARK | FINLAND | FINLAND | FINLAND | AUSTRALIA |
| 6 | NORWAY | NORWAY | NORWAY | DENMARK | GERMANY | NORWAY | NORWAY |
| 7 | IRELAND | AUSTRALIA | FINLAND | NORWAY | ITALY | AUSTRALIA | FINLAND |
| 8 | NEW ZEALAND | GERMANY | NEW ZEALAND | UNITED KINGDOM | NORWAY | DENMARK | NEW ZEALAND |
| 9 | FINLAND | DENMARK | IRELAND | NETHERLANDS | DENMARK | NETHERLANDS | IRELAND |
| 10 | AUSTRIA | AUSTRIA | ITALY | AUSTRIA | IRELAND | AUSTRIA | NETHERLANDS |

The Reputation Journey

Where are you on your
REPUTATION JOURNEY?





Thank you