

# **Branding National Assets amidst Global Diversity: Differences and Similarities across Three Latin American Markets**

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## **INTRODUCTION**

Globalization trends and the regional integration in Latin America have brought a major pressure to define which national assets are unique and, therefore, how a country, its people and its economic profile can be characterized in order to ensure visibility and appeal to the international community of consumers.

Across several Latin American countries, government and organized private interests show concerns about how to stand out of the crowd and underscore each country's specificity amidst globalization and regional integration forces. In few cases, they pursue efforts to develop a country macro-brand imaginary or concept seeking to communicate what is unique, and to emphasize competitive value-added goods and merchandises which are likely to multiply returns beyond what commodities do.

It is the consensus – not solely restricted to emerging markets – that long-term economic growth and sustainability for the domestic corporate world are strongly dependent on the success to identify critical products, services and experiences (likely or promised) that are capable of branding a country's assets. Hereby, the underlying dynamics of country-branding efforts run two-ways, proposing a major frame to expand the potential of tradable assets (and other non-tradable ones, but with positive impact for the country) while benefiting from ongoing product-specific marketing campaigns. This differs from traditional emphasis on country-of-origin factors as object of study, although it ultimately aims at achieving similar goals.

Thus, identifying these assets permits branding of the country through a clearly recognizable and tradable identity. Such identity, in turn, feeds the country's selling proposition to the world of investors, consumers and stakeholders, thus helping to build a competitive edge for the country's success at the global level.

In addition, it is essential to explore how different consumer profiles, both inside and outside the country, associate countries to ideas and products. Indeed, some consumers are more familiar than others in regards to international issues, brands and foreign countries. Thus, there are consumer segments that are favorably positioned to welcome and multiply the effects of country-brand efforts as a result of sustaining different views of globalization.

In the present contribution we focus on the policies that have been conducted in Brazil, Mexico and Argentina and we explore, in parallel, survey data collected in these countries on the outlined issues.

## **BACKGROUND**

For centuries, the notion of a country and the appeal it could present to nationals and foreign audiences was thought of on territorial terms or some other “critical mass” formats conveying a healthy diagnosis: large population, grand armies, massive industrial complexes, huge lands... furnishing a country with unique identity, resorted, in practice, to those types of measurable indicators of wealth and strength. Yet the narrowing of international frontiers with the advent of modern communication and transportation, plus the centrality of trade in shaping comparative leverage of any country in the global arena dramatically changed the sources of power. Business vitality, investment attractiveness, the reliability of goods offered and demanded for exports, tourism appeal, trade efficacy, cultural prestige and political legitimacy became the contemporary sources of comparative strength in world terms.

The new signs of competitiveness and latitude over the pressures of the global agenda rapidly became familiar to markets, companies and governments. As a result, identifying a country advantage based on the old indicators of potency was no longer of use - at least for the vast majority of the nations. On the other hand, the new indicators happened to be too many, requiring different players and levels of engagement to be easily identified and championed. What it required, then, was an effort to integrate them into a consistent identity, or a strategy that would address the need to generate and feed those indicators as intentional outcomes.

Efforts at branding national assets and developing a country-brand come into action with a similar goal to that which justified the championship of a nation's leverage due to its military power, population size or land availability. To put it briefly, it was aimed to position a country in a favorable manner to the nationals and, usually more important, abroad.

From this perspective, globalization entails two specific challenges for emerging markets: firstly, to adapt to global trends and processes, thereby minimizing laggard status; and secondly, to still maintain what is unique and singular to them in order to be autonomously recognized. This means the country will not be pooled together with other countries that may share similar conditions yet different aspirations or enduring experiences. The need to diversify (and remain diversified), and yet display effective proof of successful adoption of global uses and standards, creates important cross-pressures for emerging markets.

Moreover, diversification also implies dealing with contradictory forces. In fact, there is no easy choice to stand out just based on indigenous strengths in the face of competition for the same homogeneous inputs and products that many other emerging (and even well-developed) countries are fighting for. These include financial and human capital, favorable and value-added trade, international prestige and recognized reliability, etc. Assuming that a true identity is preserved without such uniqueness ever being noticed by the world public opinion is like not having any identity at all. Similarly, a country that fails to gain resonance in terms of reputation at the international level can hardly profit from any singular trait or inner strength it may have. If the final goal from a country marketing perspective is to build up a competitive advantage and/or consolidating a unique selling proposition, a situation that puts emphasis on product and other national assets diversification - while also giving room to offering easy-to-read performance indicators by global stakeholders - may result in contradictory decisions.

Undoubtedly, emerging markets are competing with other emerging and developed countries for stakeholders' attention; attention concentrated towards raising interest, confidence and action from investors, tourists, consumers, reporters, importers and intelligentsia. Critical to this effort is the building of a positive and believable branding campaign of national assets; that is, presenting an effective country-brand. In doing so, it is essential to understand how nationals perceive their own country and how countries are perceived abroad, especially among the target publics and those most customarily exposed to the country experience.

What differentiates nations is the perception of them and the quality of their brand. This refers to the image of the country or to their reputation in the public opinion arena; such reputation has an increasing effect on the destiny of each country - a truism that didn't go unnoticed by marketers and governments. Not long ago, Foreign Affairs magazine summarized the problem, stating: "an unbranded country has difficulty attracting economic and political attention...country-branding is a long-term, cumulative effort that will influence foreign investment decisions and market capitalization".

Effective country-branding, then, is about building reputation and developing an appealing selling proposition which aims at obtaining collective results, such as improving price and terms of trade for its products and services, gaining an advantage in its international relationships with stakeholders (both within the nation and abroad), and ensuring image resilience to cope with negative developments and events.

The attention to this issue began with the concern about the country-of-origin effects on products and services from the late 1970s through the 1990s, but which evolved into a wider and more complex issue of country-branding in the late 1990s. Initiatives from Britain and the USA rapidly echoed in other countries, even if those were not evaluated as successful.<sup>1</sup>

### ***Contextualizing Country-Image and Branding in Latin America***

In Latin America, and more specifically among the 3 countries involved in the present study: Argentina, Brazil and Mexico, such realization is fairly recent. However, the motivations and aspirations which structured country branding efforts in each nation are different; as well as the different economical and institutional background that conditions the unfolding of each campaign.

#### ***Mexico: A Tourism-Centered Country-Branding Approach***

Mexico led the way by setting in motion a pragmatic tourism-centered marketing plan in late 2003. This plan sought to maximize the benefits of the country image overseas as a sector-oriented brand for more diversified tourism activities.

Under the slogan "Mexico is unique, diverse and hospitable", the campaign sought to reinforce positive images for this category, stretching those pluses as a diversified cultural destination that overcomes the limitations of the sun-and-beach proposal. Accordingly, the plan highlighted 7 alternative offers of beach tourism, business travel, cultural/historical destinations, nature/adventure travel, premium tourism, entertainment travel, and event/conferencing travel. The diversification of this tourism offer aimed at optimizing survey findings which revealed values associated with Mexico and Mexicans, emphasizing hospitality, simplicity, modernity, luxury and the unknown.

Even though president Vicente Fox (2000-2006) explicitly stated that tourism become a formal state policy and a strategic ally for long-term development (and many formal partnerships with private sectors ensure that such vision will survive his administration), the choice for reducing country-branding efforts to one single dimension may curtail the actual maximization of the results. This may not be a concern in the short-run; after all, foreign tourism responds for nearly USD 11.5bn in revenue (estimation for 2005) thus largely exceeding the economic contribution of many other industries. In fact, the status of the Mexican tourism industry is incomparably stronger than that of Argentina or Brazil.<sup>2</sup> Moreover, trade concentration in the US market via Nafta agreements partially justifies the lack of country-branding projections of the tradable products and services.

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<sup>1</sup> "Cool Britannia" was the motto of the UK branding campaign launched in 1998. By November 2001, the minister of Culture, Media and Sport declared the attempt a failure.

<sup>2</sup> Mexico ranks 7<sup>th</sup> in foreign tourism visitors and 11<sup>th</sup> in foreign tourism spending volume; in quantity terms, it is between 4 and 5 times the volumes seen in Argentina or Brazil.

As of mid 2005, it was clear that the repositioning of the country-brand offer in tourism-centric terms had been a success, holding multiple effects beyond the immediate North American market (which responds for 80% of foreign visitors). However, as Mexico is a fairly complex and industrialized economy, such a country-branding policy is so out of touch with other government department needs (i.e., attracting foreign investment, stopping and reverting brain drain, diversifying trade partners, etc.) that it will require a major strategy revision or the launching of a parallel effort focused on "tradables" and other national assets.

### *Brazil: Country-Branding as a Strategy for Image Redefinition and Rising Product Awareness*

Earlier in 2001, a first-world poll for exploring the image of Brazil was conducted by a trade association<sup>3</sup> with partial interests of understanding foreign perceptions of the country, as well as potential niches likely to develop in order to improve the nation's overseas reputation. The CNT survey had no government backup, nor the materializing of any institutional follow-up in terms of policy-influencing events or formal recommendations. Main findings of the study were the huge lack of knowledge about Brazil's diversified industrial base and product portfolio.<sup>4</sup>

Also earlier in the 21<sup>st</sup> century, a first joint effort between the trade group, Abicalçados, and the government exports promotion agency, Apex, sought to understand how shoes made in Brazil were perceived by French customers. Above all specific details, the big surprise was to find out that despite the fact that Brazil scores among the top 5 world exporters of shoes, its product offer was virtually unknown by the average French consumer.<sup>5</sup> In early 2002, MDIC, Apex<sup>6</sup> and Embratur (the national bureau of tourism) planned a major country-brand project aimed at understanding the potential for reverting the lack of knowledge of Brazilian products and addressing the need to stretch the association of tourism beyond just one or two options of tourism. A major international survey, coordinated by the ad agency McCann-Erikson, was launched in 16 countries to feed the definition of a country logo and the contents and tones of the country-branding effort overseas. However, it took over 3 years to reach the first of those goals.

Later in 2004, another isolated poll, conducted in France by the University of Grenoble, sought to explore the feelings and reactions elicited by the Brazilian industry and products.<sup>7</sup> The main findings revealed that "made in Brazil" symbolized mainly primary goods which were based on unsophisticated technology (if any tech involved at all), a low yet fairly priced cost, and fact that usage pride was not found among potential customers. Such a picture revealed low brand awareness whereas the archetypical consumer of Brazilian products was seen as different from the very same respondent. Brazilian products were thus perceived similar to Chinese products. On the other hand, the "made in Brazil" concept elicited positive and emphatic feelings, thus paving the road to a more receptive audience for future campaigns. Interestingly, Drouvot concluded that Brazil faces more than an image problem; it faces a low awareness problem as well.

Such a diagnosis can coexist with the fact that powerful and positive pictures of Brazil related to beaches and landscapes, festivities like Carnival, and collective and artistic passions such as soccer remain widespread among foreign consumers. Yet many negative features related to daily life in Brazil, voiced by respondents in different studies, couldn't be ignored. The challenges emerged: how to make well-known events and images capable of extending their positive aspects

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<sup>3</sup> The National Federation of Transportation (CNT), a private trade union of transportation owners that acts mainly as a lobby agent but has also served as a platform for political career and visibility. Not rarely, the upper echelon of CNT presents candidates for legislative bodies at the state and national level for any of the three conservative forces: PFL, PP or PTB. Having said that, no legislative impact can be attributed to the results of the survey.

<sup>4</sup> This is despite the fact of scoring among the top 10 countries with a higher industrial GDP share over the total output.

<sup>5</sup> Abicaçados/Apex survey.

<sup>6</sup> Ministry of Development and Foreign Trade and the Exports Promotion agency.

<sup>7</sup> Drouvot, H. (2005).

to other categories, as well as how to cope with negative features, without denial and without falling into incongruence or low credibility.

By Q.1 2005, the government-sponsored country-brand project was finalized and a country-logo was approved. Among the content highlights were the country landscape diversity and the variety of regional cultures; these assets were aimed to feed and be integrated with three main conceptual issues thought to structure the overall branding effort: innovation, modernity and reliability. One core inference, then, was the need to export the notion of diversity easily associated to geography, art and culture towards the arena of industry where Brazil already stands out, but where only few know about it. Examples involve airplane construction, diamonds, IT solutions and quality shoes – all products that Brazil has been intensively exporting for decades, but has failed to get the credit for.

After the public launching of the country-logo, however, momentum was lost and it failed in becoming a continuous policy. Seasonal and product-specific campaigning effectively takes place in different countries, but without regularly conspiring for consistent results over time. More to the point, as we will show briefly, the country images among national and foreign consumers stick to the classical notions aimed at being overcome by the country-brand effort. Continuous research and action must be ensured against such conceptual resiliency in order to achieve desirable outcomes.

#### *Argentina: Lying the Basis for a Conceptual Umbrella Brand*

In Argentina, discussion is still in its infancy despite overnight decisions to develop a country logo and promotional materials with clearer institutional scope and commercial goals. Like most Latin American countries, main incentives originated with a renewed interest of tourism as a source of foreign exchange and economic re-activation.

Local studies confirm that the first and most salient impact of the Argentinean country-branding actions took place in the field of tourism. As one study found, the country refers to notions linked to leisure options (when it does not just involve characters of politics or sports). Key concepts, pre-selected and explored in selective publics with low awareness of the country, indicated natural beauties as the highlights of Argentina, thus scoring high as “an exotic and attractive destination”.<sup>8</sup> This, incidentally, was a label that could fit well to Argentina, Ecuador, Costa Rica, or most South African and South Asian countries. This fact brings about an alert: if a national branding attempt is pursued, it is to obtain a singular competitive advantage - not to repeat a broader trait already worked with intensity (if not more efficacy or credibility) by other emerging markets.

Further explorations of country-brand blueprints and big business plans revealed: a) a rather circumscribed and short-term effect on agricultural commodity producers; and b) a strong dependence on company life-cycles into the world markets, making it more substantial to the initiatives of first-time exporters and SMEs. Interestingly enough, despite such developments which may suggest little support for sustained country-branding efforts, reps from top companies repeatedly insisted that the lack of country positioning as a brand is costing Argentina business opportunities (some even mentioned “inestimable loses”).<sup>9</sup>

In 2005, an inter-ministerial foundation was created to develop a visual identity and to coordinate sectorial suggestions likely to be integrated into a single country-brand proposal. Different from other nations, the local comprehension of country-branding resorts to not only putting an emphasis on geographic or economic assets, but also to local characters with international projection and symbol-persons. More than focusing on the rise of specific industry awareness or seeking to obtain recognition in one category, the country-branding plan admits that the nation’s singularities shall frame the entire approach – a choice that runs the risk of overstretching and diluting the core

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<sup>8</sup> UB study ref: Notes on the relevance of an Argentina brand.2005.

<sup>9</sup> Notes on the relevance of an Argentina brand (2005).

identity and goal of this strategy.<sup>10</sup> Also, it explicitly states the goal to maximize dividends from sports excellence, as well as local science research and developments.<sup>11</sup>

Such an approach reveals a different situation than Mexico or Brazil. Unlike Mexico, foreign tourism in Argentina, though important and on the rise, is far from topping the list of revenue-generating sources.<sup>12</sup> In fact, the main concern of local authorities in this area is to redress the currency drain that results from substantial numbers of Argentineans traveling abroad to spend holidays. Also, unlike Brazil, Argentina lacks a diversified industrial park or product portfolio, which would justify the usage of country-branding as a tool for repositioning a wide range of local goods abroad. Actually, the country advantages are still perceived in the agricultural business with few niches in other segments such as biotechnology, cultural products, and information services.

## **RESEARCH AGENDA**

If efforts at branding a country begin by understanding the nature and role of the images of one's own land and people as a place to invest or a source of consumer goods (as well as other countries' images, which would say a lot about their projected view as a tourist destination), then the contribution of market research to the success of these initiatives is essential. Steps in that direction begin by assessing those views and understanding how they relate to each other. This is one of our primary research goals, aimed towards examining a multi-country survey study that explores self-perceptions and cross-country perceptions of the nation, its people and its products/services.

The study was conducted in Argentina, Brazil and Mexico replicating a common set of questions exploring spontaneous meanings of each country and product, as well as specific activity and asset evaluations across these countries (including the US). More specifically, questions dealt with unprompted linking of markets to experiences, concepts and products, semantic differential scales evaluating populations, opinions about national and foreign product quality, experience traveling to foreign countries, and the self-perception and cross-country assessment of the three countries (including the US) as places to live, travel and study. In addition, those surveys have addressed questions concerning international and globalization issues.

Since the context of this analysis is to understand the basis of country-branding efforts, a final examination will focus on the core allies of such efforts among the general population; that is, the segments from public opinion that present a higher willingness to embrace such country-branding initiatives, as well as to position themselves as a positive resonance chamber of the actions taken by the government and private sector.

In approaching such an agenda, we will discuss the degree of difficulty linking specific countries to specific assets, the consistency between the self and cross-country perceptions, and the window of opportunity for successful branding of national assets suggested by the findings.

## **Methods**

To cope with these objectives, our agenda will begin by exploring primary associations of the country and products towards different types of ideas and references. Such an overview based on unprompted probing of country images will permit the composition of an empirical map where those country-branding initiatives actually start, and the kind of obstacles and opportunities that such campaigns may find along the way.

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<sup>10</sup> To some extent, such a generalist approach reflects the building process of the brand plan which involved several government areas not just the tourism board.

<sup>11</sup> See EMP, Strategy Country Brand: [www.marcaargentina.com.ar](http://www.marcaargentina.com.ar)

<sup>12</sup> Still, it is considered to rank among the top 5 revenue sources, but without having strong employment or an economic activation impact, as in Mexico.

Secondly, we will analyze country profiles upon the perceptions of a number of specific domains that compose the sources of its image and, therefore, the dimensions that a country-branding effort should be attentive to. These domains involve the lifestyle offer (the country as an option to live), the product offer (the evaluation of its goods), the offer for innovation and scientific appeal (the country as an option to study), the experiential offer in terms of travel destination (the country as an option to visit) and the sociability offer (the evaluation of its people). By capturing assessments in these dimensions, we spot the values that structure the perceived identity of each nation, and therefore the basis upon which a brand is likely to be built.

In describing consistencies and diversities of views across markets and publics, the potential for thinking of an umbrella strategy (vis-à-vis an atomized portfolio of particularistic references) is addressed. Next in line is the examination of the degree of convergence between self-perception and external views of each market asset. Then, we move on to summarize the strengths and weaknesses that condition the undergoing country-branding attempts. Finally, we seek to identify the size and characteristics of those publics that are more favorably positioned to endorse and feed back the country-branding efforts.

The analysis is based on a one wave public opinion survey designed by Market Analysis and conducted in Brazil, Argentina and Mexico, with the fieldwork assistance of Mori Argentina and Parametría of Mexico. The Brazilian data sprang from Market Analysis Brazilian Omnibus Survey from December 2004 (wave of N=800 face-to-face interviews conducted in the top 8 Brazilian cities). Argentinean data is from January-February 2005 Omnibus Survey (wave of N=833 telephone interviews in 5 main metropolitan areas). Mexican data is from November 2004 Parametría Omnibus Study (wave of N=955 face-to-face interviews, conducted nationwide).

## **DISCUSSION**

### ***Primary Association of Countries and Ideas***

One key question in unfolding country-branding programs has been to define the sources that will feed their content. The tension between giving priority to local views over what foreign eyes perceive has characterized many of these efforts. Still, salience to such opinions implies that spontaneously perceived images are the starting point of the analysis. Accordingly, we begin by examining the self and cross-perception of the nation's society, people, and products in the three Latin American countries.

*Table 1* explores the answers in reaction to the question concerning the "first image" that comes to mind when the national samples hear about Brazil, Mexico, Argentina and the United States.

**Table 1 - Self-perception and cross-national perception of country image (unprompted; top-5 mentions)**

<b>BRAZILIAN Perception:</b>		<b>MEXICAN Perception:</b>		<b>ARGENTINEAN Perception:</b>	
<b>...about BRAZIL</b>		<b>...about BRAZIL</b>		<b>...about BRAZIL</b>	
DK/NS	22%	DK/NS	53%	1. Beach	44%
1. Violence, crime	10%	1. Soccer	15%	2. Tourism	12%
2. Poverty, starvation, inequality of opportunities	9%	2. Positive aspects of the people (joy, cordiality...)	6%	3. Rio de Janeiro	5%
3. Carnival	6%	3. Carnival	5%	4. Carnival	4%
4. Positive aspects of the people (joy, cordiality...)	6%	4. Nightlife, dances	5%	5. Natural beauty, landscape	4%
5. Soccer	6%	5. Beaches	2%	DK/NS	3%
<b>...about MEXICO</b>		<b>...about MEXICO</b>		<b>...about MEXICO</b>	
DK/NS	29%	DK/NS	37%	1. Beach	17%
1. Poverty, starvation, inequality of opportunities	7%	1. Food and vegetables	5%	2. Tourism	16%
2. Sombrero (hat)	5%	2. Charros and Music (mariachis)	4%	DK/NS	13%
3. Economic crisis, unemployment	5%	3. Culture (Folklore)	3%	3. Pre Colombian culture	8%
4. Violence, crime	4%	4. Home, love for the country	3%	4. Culture	7%
5. Soccer (1970 world cup)	4%	5. Corruption	3%	5. Natural beauty, landscape	5%
<b>...about ARGENTINA</b>		<b>...about ARGENTINA</b>		<b>...about ARGENTINA</b>	
DK/NS	28%	DK/NS	68%	1. Cities and sightseeing	20%
1. Soccer (mainly the rivalry)	17%	1. Soccer	8%	2. Family, home, friends and love for the country	9%
2. Music	6%	2. Music (tango)	3%	3. Natural beauty	8%
3. Negative aspects of the people (arrogant, untrustworthy ...)	5%	3. People (joy, cordiality...)	3%	4. Good place to live	6%
4. Economic crisis, unemployment	5%	4. Negative aspects of the people (arrogant, untrustworthy ...)	2%	5. Economic crisis, unemployment, underdevelopment	5%
5. Poverty, starvation, inequality	3%	5. Economic crisis	2%	DK/NS	4%
<b>...about the UNITED STATES</b>		<b>...about the UNITED STATES</b>		<b>...about the UNITED STATES</b>	
1. War / terrorism / September 11 <sup>th</sup>	39%	DK/NS	47%	1. War / terrorism / September 11 <sup>th</sup>	16%
2. Rich/developed country (land of opportunities)	15%	1. Economy, 1st world	11%	2. Big cities / NYC / Statue of Liberty	15%
DK/NS	11%	2. War / terrorism / September 11 <sup>th</sup>	4%	3. Progress	6%
3. Negative aspects of the people (arrogant, intolerant, greedy ...)	6%	3. Work and employment (opportunities)	3%	4. Tourism / Disney	6%
4. Cities, sightseeing	5%	4. Migration, family	3%	5. Power	5%
5. President, national symbols	4%	5. American people	3%	DK/NS	5%

Note: Brazilian data N=800; Mexican data N=955; Argentinean data N=833

Our analysis will proceed country by country aiming at outlining the main insights obtained from this summary of views. These views represent the latent country branding as it exists for the typical urban consumer of Latin America. Working against the mental pictures of each country are current and future efforts at building and defining a new identity. In other words, these outcomes summarize the key issues and facts that today furnish meaning to the country. As such, these views encompass the core obstacles to be worked out (whenever conspiring directly or indirectly with the goals of positively promoting the country overseas and redressing credibility deficits before the consumer publics). On the positive side, these replies identify the judgmental shortcuts that are currently in use by the local and foreign publics for the purpose of making sense of each country's personality. These reveal the extent to which a new program may find fertile soil for specific or broader branding propositions, for the purpose of riding upon the secured prestige in one easily identified area that becomes consensual in the perception of the public or, contrarily, admitting that it will first need to recognize and focus on one particular asset or issue.

### **Views about Brazil: Policy Problems and Collective Celebration**

If branding campaigns have, at one point, a dilemma in the face of disagreement between locals and foreigners (about what is typically the core issue that defines a country), such a dilemma becomes an impasse for action when such a disagreement takes the form of prevailing negative views in one public versus prevailing positive views in another public. This is the case for Brazil. A qualitative analysis of perceptions show that Brazilians see themselves in far tougher terms than the way Mexicans and Argentineans do.

Prompted to describe their first image of Brazil, policy outcomes come first to the minds of the locals. These come in the form of policy problems affecting everyday life. Unlike other societies in the continent, Brazilian inquiry about the country's character is understood as an opportunity to speak their voice about the public agenda. Thus, Brazil's spontaneous meaning relates to the public's concerns regarding the many problems the country faces, such as crime and poverty.

As expected, those are not the only notions that brand Brazil to the average Brazilian consumer. In second place come the popular rituals of collective celebration, as well as references to what they imply: carnival festivities, soccer and the personal joyful character of the people.

Mexicans think of Brazil mainly in terms of its key cultural products: the land of soccer and carnival. Conversely, the Argentineans' branding of Brazil points to its tourism assets: beaches, tourism as a general activity and destinations such as Rio de Janeiro. Having said that, both Mexicans and Argentineans share –to a great extent– their representation of Brazil in the symbols of traveling opportunity and exclusive experiences related to the local festivities. Even if some differences in items ranking and opinion intensify across foreigner consumers, the image of Brazil held does not involve conflictive issues or incongruent options. Such advantages pave the road to allowing the chance of building a somewhat extensive branding proposition capable of appealing to all three publics.

### **Views about Mexico: Low Awareness and Diffuse Identity**

Out of almost four of every ten Mexicans (37%), there is not a single highlighted event or factor that synthesizes the idea conveyed by their own country. This speaks not so much about missing connections between nationals or local assets, but of the relative difficulty to elicit abstract thinking among publics composed by a large number of ill-educated or low schooling level consumers.<sup>13</sup> This may signify an obstacle for a government or trade sector seeking to engage their co-nationals into a common set of values which define the country-brand. On the other hand, it means big latitude for the outlining of a country brand proposal, based on values and issues as wished.

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<sup>13</sup> It should be noted that the Mexican sample covers more than just the top urban areas - something that has implications in regards to the degree of sophistication of respondents and their access to higher schooling and information resources.

It is not a surprise, then, that one in every three Brazilians (29%) and one in every eight Argentineans (13%) cannot relate the country to any mention. Mexicans aiming at building a brand identity are challenged by such results, yet also benefit from its implication as a *tabula rasa* upon which they can draw new insights in an uncontaminated environment.

Such an optimistic view is reinforced by the fact that a majority of Brazilians, Argentineans and Mexicans can effectively associate the country to several attributes, mentioning not just one or two isolated features related to one-two dimensions, but speaking about a wide range of traits. This yields a sense of multiple references likely to be used to build up the Mexican brand image, thus broadening the number of target audiences.

Indeed, Mexicans deliver the primary images of food, music, culture, love for the country (associate the idea of a good place to live) and corruption. The image Brazilians have about this country is somewhat negative. It is associated to poverty (7%), economic crisis (5%) and violence (4%). In other words, they resort to media-mediated images which reflect a strong dependence upon information and movie channels to form a perception (rather than through direct or indirect experiences). Such positioning of Brazilians is also confirmed by the last two references: the 'sombbrero' (hat) image (which happens to be the only tradable asset present in the mind of Brazilians) and soccer, mainly because of the two world cups that took place there.

Argentineans firstly associate Mexico to its natural beauty and its offers of travel. This may be a sign of the success of Mexico's large efforts to promote its tourism (needless to say, those efforts have been mainly directed towards the US Market). It may also be the outcome of the exposure of Argentineans to different sources of information. This is further suggested by references to the civilization assets of Mexico which grant additional latitude for brand management and positive feature spinning when composing the country-image assessment. Thus, to some extent, Argentinean reactions mirror the success of Mexico initiatives unfolded by the Tourism ministry, but also its limitations as a jump-board for Mexico's tradable assets.

### **Views about Argentina: Parochialism and Leisure Identity**

Concerning the self-perception of Argentina, it is quite interesting to remark that there is a large localist and emotional aspect in the image that comes to the mind of Argentineans when they are asked about their country. The huge economic crisis this country has been through in recent years appears only in last place (bearing in mind that we only explore the 5 main images here).

Interestingly enough, such views speak very well about the content of "Brand Argentina's" promotional materials, which leads us to believe in similar findings and assumptions feeding the first version of the campaign. In fact, the video campaign presents a very nationalist, emotional tone that frames all of its remaining content – something that may find a responsive chore among locals but grossly misses the actual public target of such efforts (the external markets of consumers, investors and travelers).

The main ideas that come to mind of Brazilians and Mexicans when they think about Argentina coincide: soccer first, then music-dance (tango). That is, it points to partially tradable items, mainly active in the leisure-level offer. On the other hand, mixed feelings about the locals may conspire against desires to attract visitors or top brains from abroad, since it conveys an expectation for unrewarding sociability experiences. One can speculate that the strong self-representation by Argentineans involving a huge attachment to their own country may explain this adverse perception.<sup>14</sup>

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<sup>14</sup> People's arrogance also summarizes unprompted impressions about the United States, even though it does not reach the top 5 ideas.

Last but not least, the persistence of recalling the economic crises across foreign publics may hamper any plan of showing the country as a land of opportunities for investment capital.

### **Views about the United States: Policy and Status**

The leading US image across Latin America's largest societies reflects its policies and, secondly, the country's economic status. For a significant portion of Latin Americans<sup>15</sup>, references to war, terrorist events and involvement in the Middle East conflicts are becoming the archetype of what the US is about.

Still, a certain pluralism of icons remains alive revolving around tourism or the people. Hardly any tradable assets made it to the top mentioned. This is far from meaning failure, since the US country-branding effort before Latin America usually concerned issues of government prestige and policy support, rather than attempts at attracting any type of resources from their southern neighbors.

### **Convergences and Divergences**

Each country's top self-perception feeds on different logics and sources across the three societies. Among Brazilians, this self-representation remits to social conditions with more intensity than any other feature. Among Mexicans, the top image is about ethnicity carried mainly by cultural traits related to folkloric and everyday life aspects. Among Argentineans, the most powerful country references remit to a broad notion of self-belonging, by means of geographic contexts and emotional attachments, submitting a sense of individual inclusiveness.

The outcome points to a large level of diversity in terms of country-defining features, but also in terms of key traits capable of maximizing the potential of these images into tradable objects. Mexican self-perception gets closer to commercially viable products such as food and music, while Argentineans emphasize objects of touristy appeal.

How close are self-perceptions to the country-image among the main neighbors? In the case of Brazil, carnival is the common factor that characterizes the nation before Mexicans and Argentineans. For Argentina, the cognitive shortcuts for foreigners are centered on entertainment objects, such as soccer and tango. In the case of Mexico, no common trait is defended at the same time across its southerner peers, but it is clear that a plurality of images reign.

The match between self-perceptions and cross-national perceptions is also partial. Categories may coincide, but not in the same rank of importance. Interestingly, matched mentions within the top three categories of responses were the exception, not the rule (for example, for Brazil: Carnival; for Mexico: cultural references). But something should be called to attention: these societies seem not to use product-criteria or brand references to remit or signify countries, except for mentions of tourism and, more specifically, the Disney brand in the case of the US.

A second reading of this data, aiming at identifying sources of material benefits for these societies, can help to illustrate the current performance level of each country-branding effort as revealed by the measured perceptions of locals and neighbors.

Table 2 summarizes the total findings (not just the top 5 ideas) that are associated to each of the four countries. For the sake of effectiveness, we have recoded the answers into four categories (details about coding can be found in the Appendix). These categories are "tourism", "tradable"

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<sup>15</sup> This result may be slightly inflated, as one country survey placed these questions preceded by the battery of questions about the war on Iraq. Such an "assimilation effect" (Cf. Sudman, Bradburn and Schwarz, chap. 5) applies only for the Brazilian sample with low incidence over the average results.

(including products and services, but also other elements that may help sell the country, like characteristics of the people and culture), "negative" and "positive or neutral" mentions.

"Tourism" and "tradable" categories are the main categories for Mexico and Brazil. Concerning Argentina, the "tradable" mentions are also important; "tourism" only appears in the first place in the domain of self-perceptions (as Argentines associate the country with Buenos Aires, some regions like Patagonia, mountains and other tourism locations). The United States appears (due also to the visibility of the war on Iraq in the international agenda), with few tradable or tourism mentions. Conversely, we have seen that it is easier for the nationals of Brazil and Mexico to associate the US with specific products.

**Table 2 - Self-perception and cross-national perception of country image (unprompted; coded in 4 categories)**

BRAZILIAN Perception:		MEXICAN Perception:		ARGENTINEAN Perception:	
<b>...about BRAZIL</b>		<b>...about BRAZIL</b>		<b>...about BRAZIL</b>	
negative	35%	DK/NS	54%	tourism	72%
tourism	27%	<b>tradable</b>	<b>24%</b>	negative	13%
<b>tradable</b>	<b>24%</b>	tourism	17%	<b>tradable</b>	<b>9%</b>
positive or neutral	13%	positive or neutral	4%	positive or neutral	4%
DK/NS	2%	negative	2%	DK/NS	3%
<b>...about MEXICO</b>		<b>...about MEXICO</b>		<b>...about MEXICO</b>	
<b>tradable</b>	<b>32%</b>	DK/NS	37%	tourism	56%
DK/NS	29%	<b>tradable</b>	<b>30%</b>	<b>tradable</b>	<b>17%</b>
negative	23%	negative	12%	DK/NS	13%
tourism	9%	positive or neutral	11%	positive or neutral	8%
positive or neutral	9%	tourism	11%	negative	6%
<b>...about ARGENTINA</b>		<b>...about ARGENTINA</b>		<b>...about ARGENTINA</b>	
<b>tradable</b>	<b>32%</b>	DK/NS	69%	tourism	39%
DK/NS	28%	<b>tradable</b>	<b>17%</b>	positive or neutral	28%
negative	25%	negative	6%	negative	22%
tourism	8%	positive or neutral	5%	<b>tradable</b>	<b>7%</b>
positive or neutral	7%	tourism	4%	DK/NS	4%
<b>...about the UNITED STATES</b>		<b>...about the UNITED STATES</b>		<b>...about the UNITED STATES</b>	
negative	51%	DK/NS	47%	positive or neutral	30%
positive or neutral	26%	positive or neutral	29%	tourism	28%
DK/NS	11%	negative	10%	negative	28%
tourism	7%	<b>tradable</b>	<b>9%</b>	<b>tradable</b>	<b>9%</b>
<b>tradable</b>	<b>5%</b>	tourism	5%	DK/NS	5%

Note: Brazilian data N=800; Mexican data N=955; Argentinean data N=833

Across samples, the balance of references to "tradables" versus "non-tradables" reflects some conventional wisdom operating at the aggregate level. Despite low awareness of each country's top image, countries ranked in the "tradable" category matches the actual economic status of the 3 Latin American nations: Mexico, holding the largest GDP of the three and the biggest number of mentions to tradable products, followed by Brazil (the 2<sup>nd</sup> largest economy of the continent), and lastly by Argentina (the 3<sup>rd</sup> economy).

In a like manner, national public opinion does well in capturing most of the essence of the bilateral relationships between these countries. For example, Argentineans constitute the largest issuer of foreign visitors to Brazil since the late 1980s so it is not surprise that the perception of Brazil is so heavily colored by travel destination and tourism references. On the other hand, Brazil has in Argentina its leading partner;<sup>16</sup> therefore it is not surprising that reference to "tradables" of Argentinean origin feed the picture that Brazilians have of this country.

Of course, public opinion responses are not perfectly accurate, and some major gaps between reality and perception remain. Furthermore, major goals of governments can be largely missed: take the case of Mexico and its heavy accent on tourism as a core-branding element of the country across overseas publics, which has been simply ignored by the vast majority of Brazilians.

### ***Linking Country's Brand to Products and Services***

National branding campaigns may be modest or ambitious in their goals. They may aim at merely boosting tourism activities and diversifying them beyond traditional destinations and the conventional offer, or at seeking to have side-effects in the economy and foreign role of the country. Regardless of the original intent, it is taken for granted that byproducts, such as strengthening new services/products, are welcomed.

Looking at the perceptions that consumers hold of each country, specific products may permit to ascertain the extent to which such a match or halo effect is verified. The data is consolidated in Table 3.

Let's begin with Brazil. As mentioned, the consensus about a country-branding image highlights specific events or facts, such as carnival, soccer, a joyful life and attractive landscapes (e.g. beaches, tourist destinations). These notions refer to cultural products or assets potentially tradable as services (that is, the experiential plus of daily life amidst joyful people and the exotic nature as tourism destination). These help to brand Brazil in a reliable manner among regional markets. However, to what extent can such a record lie grounds for an attempted category extension effort towards other products and services? Can we translate favorable views on a cultural goods domain into a receptive and knowledgeable public with regards to other products, especially more sophisticated and value-added ones? This is the practical challenge that country-branding initiatives face when overcoming the image definition task.

For certain, the large DK/NS response rate of Mexicans concerning Brazil (53%) blocks optimism for a successful category projection attempt. Compared to broader country images, larger rates of unawareness (elicited by product-level probing) represents a grander obstacle.

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<sup>16</sup> In fact, this has been reciprocal for Argentineans as well since the signature of the Mercosur (Southern Cone Trade Agreement) in the early 1990s.

**Table 3 – Self / cross-national association of countries and products (top-5 mentions; unprompted)**

<b>BRAZILIANS associate products to...</b>		<b>MEXICANS associate products to...</b>	
<b>... BRAZIL</b>		<b>... BRAZIL</b>	
1. Coffee	15%	DK/NS	73%
DK/NS	8%	1. Coffee	5%
2. Beans	7%	2. Agricultural prod.	3%
3. Cars	6%	3. Clothing, shoes	3%
4. Fruits	6%	4. Food and drinks	3%
5. Beer	5%	5. Music and Carnival	2%
<b>... MEXICO</b>		<b>... MEXICO</b>	
DK/NS	48%	DK/NS	45%
1. Tequila	17%	1. Oil and gasoline	11%
2. Pepper	4%	2. Food	5%
3. Tourism	4%	3. Tequila, beer, other alc. bev.	5%
4. Food	3%	4. Corn	4%
5. Clothing and shoes	3%	5. Handcrafted products	3%
<b>... ARGENTINA</b>		<b>... ARGENTINA</b>	
DK/NS	46%	DK/NS	85%
1. Meat	7%	1. Food and beverages	5%
2. Clothing and shoes	5%	2. Clothing and shoes	2%
3. Soccer	4%	3. Agriculture	1%
4. Wine	4%	4. Cars	1%
5. Cars	4%	5. Minerals and wood	1%
<b>... the UNITED STATES</b>		<b>... the UNITED STATES</b>	
DK/NS	27%	DK/NS	55%
1. Clothing	12%	1. Clothing and shoes	7%
2. Fast food	11%	2. Cars	6%
3. Computer	7%	3. Food and beverages	4%
4. Electronic appliances, A/V	6%	4. Dollars	3%
5. Cars	6%	5. Fast food	3%

Note: Brazilian data N=800; Mexican data N=955

Such a substantially higher level of non-response indicates a difficulty to associate products to countries. That is the case for both publics (Mexicans and Brazilians) in regards to products of the other countries (except the US). Here is shown a benchmark country capable of successfully maintaining a clear-cut product identity (even if its country image follows a different direction); one that keeps emphasis on “tradables” at a minimum. For those consumers that succeed in overcoming such complications, the picture that emerges about product portfolio is one of highly pulverized responses --the top mention hardly going beyond a one-digit value.

Concerning Brazil, the self-perception - as well as the perception of Mexicans - associates the country first with coffee and then with other food products. In that sense, a commodity-oriented view prevails. The self perception also gives room to cars and beer as country-defining goods. Mexicans associate clothes, shoes and apparel to Brazil.

Product images associated to Mexico are more varied, although they also hardly exceed the realm of primary goods or simple manufactured products. The top country-product association among Brazilians is tequila (17%). Other 'traditional' products include pepper, food ingredients, tourism and clothes. Mexicans see their first product as petrol and derived products, as well as drinks and food staples which usually represent the Mexican cuisine outside of the country.

Argentinean products converge in raising references to the conventional goods that historically characterize the country (e.g., beef and wine), but also to manufactured products such as cars and clothing (mainly, wool-made textiles like sweaters and leather articles) and shoes. Among the three Latin American countries, Argentina stands out as the one eliciting more convergent views.

Explicit mentions to brands (as heuristic tools spontaneously used to refer to product by respondents) are verified only when asking about US allusions. Food, beverages and fast food products raise mentions to Coca-cola and McDonalds.

### ***Exploring Country Brands as Umbrella Concepts***

Countries may build an image upon a specific domain of reference casually recalled by international customers, but strong country-branding performance results from success in achieving a multidimensional understanding of the nation. Thus, a country brand should work as a general frame of reference. Such an umbrella notion is not just a format to conceptually organize a country's meaning to the inner and outside world of consumers and stakeholders but also an effective tool to generate multiple effects on different levels in order to optimize the investments associated to a branding campaign.

As a latent set of values and aspirations, brands involve multiple references or propositions; such multiplicity relates to the different domains likely to be involved. This notion falls in line with the one Anholt developed for its national image index, involving six domains. In our model, we assume that five dimensions feed a broader country-brand notion. These are, the product offer (captured by the evaluation of products), the lifestyle offer (captured by the assessment of country as a good place to live), the experiential offer (captured by the assessment of country as a good place to travel), the offer for innovation and cognitive stimuli (captured by the assessment of country as a good place to study), and the sociability offer (captured by the assessment of the country's people).

Accordingly, we summarize in Table 4 the findings for these dimensions whenever data was available across domains.<sup>17</sup>

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<sup>17</sup> The evaluation of country assessments as a place to live, study and travel, as well as its products, was done using a 4 point scale (from very good to very poor). Brazilians and Mexicans have been asked to rate the four nationals in a 5-point semantic differential scale: lazy/hard-working, stupid/intelligent, antipathetic/sympathetic, intolerant/tolerant, non-nationalist/nationalist, underdeveloped/developed, untrustworthy/trustworthy, enemy/friend, sad/joyful, close/open, poor/rich.

**Table 2 - Evaluation of countries (top-2 box results on a 4-point scale: very poor / very good)**

		Foreign evaluation**		National Evaluation		Net***
		%	N	%	N	p.p.
<b>Brazil</b>	Good to live	39.0	1126	88.1	781	49.1
	Good to visit	70.3	1373	92.1	790	<b>21.8</b>
	Good to study	28.1	907	60.0	757	31.9
	Good products	38.8	1018	91.3	772	<b>52.5</b>
	Evaluation of people*	30.1	831	77.8	799	47.7
<b>Mexico</b>	Good to live	46.2	1153	75.1	829	28.9
	Good to visit	73.7	716	78.8	866	<b>5.1</b>
	Good to study	37.7	960	72.1	839	34.4
	Good products	39.1	1087	72.1	828	<b>33.0</b>
	Evaluation of people*	42.8	765	59.8	899	17
<b>Argentina</b>	Good to live	42.3	1199	76.0	688	33.7
	Good to visit	60.2	1292	97.5	816	<b>37.3</b>
	Good to study	40.9	1136	77.0	709	36.1
	Good products	45.2	1107	82.5	713	<b>37.3</b>
	Evaluation of people*	30.7	1610	n/a	n/a	NA
<b>United States</b>	Good to live	53.5	2141	n/a	n/a	NA
	Good to visit	69.5	2207	n/a	n/a	NA
	Good to study	75.3	2218	n/a	n/a	NA
	Good products	70.6	2094	n/a	n/a	NA
	Evaluation of people*	43.0	1682	n/a	n/a	NA

\* This evaluation of the populations has been asked in Brazil and México only.

\*\* "Foreign evaluation" is the pooled result of the two other countries evaluating Brazil, Mexico and Argentina and the three countries evaluating the United States.

\*\*\* Net evaluation is the national minus the foreign evaluation in percentage points.

n/a= not asked; NA=not applicable

To begin with, national evaluations are more favorable than foreign perceptions. Such a patriotic bias has been found in previous data reviews (Anholt, 2005-06), regardless of region or cultural idiosyncrasies. Among Latin Americans, self-congratulation postures may incline the judgment balance as much as fifty percentage points! There is, of course, another reading to this, one that repeatedly points to Latin Americans as optimistic concerning their country, future, purchase intent and possibilities,<sup>18</sup> etc., in comparison to other nations.

What is the most favorable domain of the country offer that could readily endorse a brand initiative for each market? No doubt about it, it is tourism. Indeed, like most emerging markets engaged in branding proposals, tourism emerges as the stronger asset in all Latin countries in contrast with the case of the US, which is better evaluated as a "good place to study" and with "good products". Consistently, the three Latin American societies are far better ranked by their own people and their neighbors as great value destinations. In addition, in every country there is a clear indication that the best values are constrained to the travel dimension, thus justifying (if not overtly responsible for) the leadership of tourism boards backing country-branding attempts.

Mexico has a clearer leverage in regards to tourism as "the" country-product. Both self and cross-perceptions of Mexico confirm the centrality of tourism in building its "national branding" effort.

Comparatively, Argentina trails behind both its neighbor nations in the relative appeal of its leisure offer. Yet in contrast, it stands out as the one with the best performance ratings overseas in regards to products obtained. Based on foreign assessments only, the overall ratio for a tourist-centered versus a product-centered branding effort in Argentina is merely 1.33, whereas in Mexico and Brazil it is 1.88 and 1.81, respectively. In other words, the distance between the overseas appeal of Argentinean products to base a country-branding campaign compared to that raised by a

<sup>18</sup> Cf. Garcia Gonzáles, 2005; Echegaray & Hojo, 2005.

tourism-centric proposal is rather short, which benefits a multi-reference brand scheme. Such a best performance record is perceived in absolute terms as well; after all, nearly half (45.2%) of the significant regional audience of Argentinean products reckon them in positive terms.

Brazilians, on the other hand, react not only more favorably to the quality of their own products, but do so carrying on a patriotic sentiment as revealed by the degree of deviation from international average ratings: a difference of 52.5 percentage points between local and foreign assessments. Such a gap may imply potential resentment if the government and entrepreneurs project such favorable domestic views onto the international market. Critically, there is a need to understand such a big disparity in perceptions before taking any further action at the country-brand campaigning level.

Another branding domain rarely analyzed in relation to countries is their attractiveness in the sphere of knowledge and technological innovation –a critical aspect for investments, qualified human capital and business tourism as well. Such a notion is halfheartedly captured by the evaluation of societies as good places to study. The US holds a clear leadership here and, before the eyes of its southern neighbors, findings indicate that if there is a proposal that looks quite strong in favorably contributing to solidify the US country brand, then this is the emphasis on research and formation excellence.

Among the three Latin American publics, however, this specific domain also sets differences. Not only Argentines perceive their educational system as more competent than what their peers do in the other two countries, but such favorable recognition finds a responsive chord in the region. Thus, whereas about 41% of foreign assessment grants a positive record to the educational offer of Argentina, just 28% rates the Brazilian offer in equal terms.

Altogether, these comparative analyses show that emerging and developed markets are perceived differently based on how each rates on specific domains. Such differences build particular images that highlight a type of offer and appeal that cannot be ignored. Properly understanding the chances of each country to effectively present an identity will enhance its chances to succeed amidst the pressures for standardization, global reach and access to disputed resources. This process of differentiation is also present among emerging countries like those of Latin America, which share a common cultural matrix. This is what the diversity of assessments across markets point out. Their value strengths are different and, therefore, can help build distinct proposals or country-branding initiatives.

### ***Exploring Specific Publics: Meeting Mr. Ambassador***

Do all consumers elicit similar images of nations and react alike to the array of possible sources upon which country-branding plans can emerge? They certainly do not. Attitudes and impressions of countries reflect not just different information levels, but also different degrees of familiarity and varying orientations towards key issues of the public agenda. In order to succeed, country-branding must find a responsive public both domestically and externally. Assessing the size of such a responsive public and its driving forces is therefore critical for a good start and the sustained success of these national assets branding efforts.

This section aims at describing this type of public - a public that we call "ambassadors". They are people that think that each evaluated country, including their own, is "good" or "excellent" (point '3' and '4' in the already explored evaluation scale) in all four aspects: as a "place to live", a "place to travel", a "place to study" and the assessment of the "products" (national and foreign).

**Table 3 - National "ambassadors" in Brazil, Argentina and Mexico**

<b>BRAZILIAN Ambassadors:</b>		<b>MEXICAN Ambassadors:</b>		<b>ARGENTINEAN Ambassadors:</b>	
<b>...of BRAZIL</b>	54%	<b>...of BRAZIL</b>	20%	<b>...of BRAZIL</b>	11%
<ul style="list-style-type: none"> <li>Main images related to Brazil are "tourism" and "tradable"</li> <li>They show skills associating a product to Argentina and the US</li> <li>Optimistic about the direction the world is going</li> </ul>		<ul style="list-style-type: none"> <li>They have University degrees</li> <li>Main image related to Brazil is "tradable"</li> <li>More often than average they are able to associate a product to countries</li> </ul>		<ul style="list-style-type: none"> <li>Main image related to Brazil and Mexico is "tradable"</li> <li>Main image related to the US is "tourism"</li> </ul>	
<b>...of MEXICO</b>	23%	<b>...of MEXICO'</b>	59%	<b>...of MEXICO</b>	10%
<ul style="list-style-type: none"> <li>More often than average they are able to associate a product to Mexico</li> <li>They reduce the main image of Argentina to "tourism"</li> <li>Present a favorable view of global capitalism</li> </ul>		<ul style="list-style-type: none"> <li>People with University degree and people with very low or no education status</li> <li>Main image related to Mexico is "tradable"</li> <li>Evaluate better foreign companies than domestic firms</li> </ul>		<ul style="list-style-type: none"> <li>Young adult females predominate</li> <li>They have lower education</li> <li>Main image related to Mexico is "positive".</li> </ul>	
<b>...of ARGENTINA</b>	24%	<b>...of ARGENTINA</b>	19%	<b>...of ARGENTINA</b>	55%
<ul style="list-style-type: none"> <li>More female respondents</li> <li>Main image related to Argentina and the US are "tradable"</li> <li>They believe Brazil benefits from foreign investment</li> </ul>		<ul style="list-style-type: none"> <li>People with University degrees</li> <li>No big distinction from overall trend regarding Argentina main assets</li> <li>Main image related to Mexico is "tradable"</li> </ul>		<ul style="list-style-type: none"> <li>Respondents with more than 45 years</li> <li>More female respondents</li> <li>Main image related to Argentina is "positive"</li> </ul>	
<b>...of the UNITED STATES</b>	46%	<b>...of the UNITED STATES</b>	44%	<b>...of the UNITED STATES</b>	28%
<ul style="list-style-type: none"> <li>People from upper-middle and middle classes with secondary education</li> <li>Main image related to the US is "positive or neutral"</li> <li>They are able to associate a product to the US</li> <li>They think that the world is going in the right direction</li> <li>They believe that the US and its companies have a positive influence in the world</li> </ul>		<ul style="list-style-type: none"> <li>People with secondary and higher education</li> <li>They don't think that Mexican companies are more responsible than the foreign companies in Mexico</li> </ul>		<ul style="list-style-type: none"> <li>Belong to higher classes</li> <li>Main image related to the US is "positive"</li> </ul>	

*Note: Ambassadors are people that think that each evaluated country is "good" or "excellent" in every of four aspects: as a "place to live", as a "place to travel", as a place to "study" and their "products". Every argument in the table is significantly associated to the fact of being an "ambassador" at the 0.1 level.*

Table 5 shows that, in each country, the "ambassadors" of the other Latin American countries account to 10% to 20% of the surveyed public – the exception being those identified as “ambassadors of US” who are more numerous, adding between 30% and 40% of consumers.

As expected, the quantity of people that positively evaluate their own country is higher - about 55% of the samples, on average. A short description of each profile follows.

### *Ambassadors of Brazil*

Fifty-four percent of the general public in urban Brazil can be characterized as "ambassadors" of the country. They mainly think of the nation in terms of "tourism" and "tradable" images, thus deviating from the total sample response pattern which tended to associate Brazil with policy failures or negative social conditions.

They are also capable of associating products to Argentina and the US; this is an indication of a more open-minded and internationalized world view. In fact, they stand out as optimistic, agreeing that "the world is going in the right direction".

"Ambassadors of Brazil" in Mexico (20%) and Argentina (11%) have a more qualified view of the country, associating "tradable" concepts to it. Among the Mexican sample, this minority stands in opposition to the vast majority who couldn't identify one single image in association with Brazil. This entails a demographic difference, since this group holds higher education which is consistent with a greater exposure to overseas information and imported products. In the Argentinean sample, this pro-Brazilian elite can easily relate to goods when thinking of Brazil against the mainstream reaction of associating the neighbor country to "tourism" assets (especially "beaches").

### *Ambassadors of Mexico*

"Ambassadors" inside the country account for 59%, a majority which encompasses both people with higher and very low or no education. Skepticism on the performance of the nation in different domains remains the privilege of medium classes.

These "ambassadors" associate Mexico with "tradable" concepts. Although the goods referred to are of a divergent nature (depending on the class membership of "ambassadors"), such positive posture ensures a good starting point to the "national branding" of services, products and Mexican culture, thus going beyond the tourism-centric approach developed so far. Interestingly enough, Mexican "ambassadors" may endorse a tradable-centric branding campaign, but they do not necessarily trust the private sector that produces those "tradables". As a result, expectation of success relies on government sponsored activities –a position more strongly defended by people with university degrees.

"Ambassadors of Mexico" in Brazil (23%) are able to associate a product to Mexico, revealing that familiarity may go along with positive assessments. This group is especially open to global capitalism approving the domestic effects of foreign investments.

Argentineans with a favorable image of Mexico are not very numerous (10%). Females respond for a higher share of this group composition, especially those in the 25-34 age range and with lower education. If not the traditional target of a tourism campaign, it is at least a typical consumer of mass-consumption goods.

### *Ambassadors of Argentina*

"Ambassadors of Argentina" inside the country (55%) are older respondents (45+) and largely female in their gender composition. They nurture similar emotional attachment and inclusiveness priorities than the rest of the sample, defining the national key features in rather abstract "positive or neutral" mentions, evoking concepts such as "family and friends" and "a good place to live", or national symbols like the flag. Such levels of parochial conventionalism are a hindrance against country-branding aspirations aimed at boosting trade and local goods exports. In fact, products or brands are marginally feeding this group's social representation of Argentina.

Brazilians with a positive image of Argentina (24%) more than double the number of "ambassadors of Brazil" of Argentinean origin, even if the incidence of visitors to the country among the former is lower. This plurality of Brazilian consumers is more often found among females,<sup>19</sup> and display higher familiarity with "tradable" concepts when asked about Argentina. Overall, they look worldly in their orientations, exhibiting strong knowledge of US products and holding a positive view of the role of foreign investments.

In Mexico, only a minority of people with higher educational levels are the "ambassadors of Argentina" (19%). They fit the dress of globalized consumers since they can easily relate countries to products across the board of nations studied. Argentina specifically generates multiple references to "tradable" and "non-tradable" products.

### *Ambassadors of the United States*

Of the three countries surveyed, these ambassadors tend to be of upper-middle and higher classes. This part of the population has access to international news and admires the success of the US in many domains. They have access to foreign products as well.

However, the success rate of broader country-branding plans in the building of favorable groups varies country to country. Among Argentines, the group equals a minority of slightly more than a quarter of the total population (28%). In contrast, somewhat less than half of Brazilians and Mexicans react favorably to the Brand America key components. Such contrast reveals different paths of success across the region: south of Iguazu, it can only expect to meet support among the upper and upper-middle echelons of society; whereas in the two largest markets of Latin America, its proposal shall address an heterogeneous consumer base with multiple interests and limited purchasing power.

In Brazil, the "US ambassadors" (46%) are able to associate products to a North American country. They are optimistic, agreeing that "the world is going in the right direction", and they hold a positive view of the role and influence of the US.

In Mexico (44%), they have a more qualified association of countries to ideas and products (avoiding the DK/NS option), and have a poor opinion about Mexican companies. They are indeed a public to target in market entry efforts of US products and services.

### *Consistency of the "Ambassador" Concept*

After running a series of cluster analyses with the evaluation data (i.e. whether the country is perceived as good to live, travel, study and with good products) in each of the three countries, the outcome fully matched the natural groups composed by the "ambassador" publics; this was valid for all countries. Accordingly, this shows that most of the observed variabilities in the country image assessments are due to the fact of the respondent being or not being an "ambassador". Such a role explains more than being a national of each country or the response patterns to each of the specific evaluation questions.

In addition, in order to check whether ambassadors reacted that way only for their own or for the pack of foreign countries, we tested the relationship of the groups of ambassadors with each other. Findings show that only 15% to 35% of each "ambassador" type overlaps other types.<sup>20</sup> We may therefore suppose that a large majority has a diversified view of each of the countries.<sup>21</sup>

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<sup>19</sup> This is perhaps because women do not focus on soccer rivalry between both countries.

<sup>20</sup> Higher overlapping levels concern "US ambassadors", which are more numerous in each of the surveyed countries.

<sup>21</sup> In addition, people with positive evaluations of every country are less than 1% of the sample.

## CONCLUSIONS

Despite globalization and the commitments toward creating a wider free market area (e.g., Mercosur since 1991, FTAA since mid 1990s), each major country of Latin America still projects exclusive and unique imprints of its own. This is with regards to its image and the potential proposal for branding national assets which can be projected from that. Based on the identification of those specific forces, these countries can think of their first and second stages as phases towards developing competitive selling propositions upon which a favorable reputation can be built. This is good news considering the context of harsh competition for capital, prestige and trust among emerging markets inside and outside Latin America.

Amidst global drives towards homogenization, the fact that diversity persists for a region usually treated as a bloc reveals extraordinary opportunities for developing successful country branding campaigns. Moreover, the recognition of multiple dimensions feeding the country image minimize the risk of betting in single features that overexpose and reduce the country proposition to only one arena, or towards becoming highly dependent upon a spillover effect rationale which may last too long, taking place over other domains of interest.

The defense of branding asset diversification strategies also redresses the tactical supposition that puts emphasis on monistic approaches to country-branding as the most successful one. Expecting that all stakeholders will coalesce into a single view of what country-branding should be about is not only unrealistic but ineffectual. Reputation of products and places may feed each other, but their connection is far from simple and cannot miss the other dimensions at stake: people features, travel destinations, perception in relation to science and self-actualization opportunities.

This is not to say that country-branding cannot be thought of as working as an *umbrella concept*. In fact, that may be an effective approach, given the relative inconsistency of features ranking across the three nations. But the umbrella properties of such a country-branding should be more a reflection of the *image mix* than a priori layout for bringing all key images together. It should be able to mark the boundaries of the attributes positively related to the country and provide a common sense of purpose and pride to nationals and stakeholders.<sup>22</sup>

Country-branding plans adopting the strategy of the umbrella concept will not hide the fact that some images are more strongly associated to each country than others. For example, Brazil is more easily recognized and welcomed as a great travel destination, given the landscape assets rather than as a source of knowledge growth or educational opportunities. In this regard, the global marketplace permits the building of many brands; this can happen through various possible strategies, including a conservative approach which seeks to maximize competitiveness by taking on a niche brand (before projecting positive gains onto other dimensions).

In Brazil, it is noted that the priority image of the local public (focused on policy outcomes) doesn't exactly match its Latin neighbors' perceptions. Such a result encloses two messages: either branding excludes conflictive issues related to public anxiety in order to become consistent and credible to a wider audience (including nationals) in exchange for a narrower focus on the brandable claims, or it admits some of its deficits and emphasizes the challenges that the country as a nation faces, thus appealing more strongly to specific niches of the global consumer community. As stated by one practitioner, country-branding cannot be used as a shield to cover unpleasant realities.<sup>23</sup> It needs to be consistent and believable, aiming at involving nationwide interests (thereby reflecting nationwide issues), not just sector-related interests or issues.

Furthermore, the attractive features of Brazil as a brand seem to find difficulty in getting transferred to its "tradable" domains. Since the country's "pluses" invoke mainly dimensions of leisure and

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<sup>22</sup> The idea of an *image mix* is in line with the positive evaluation of the country-branding efforts of India and Australia, focusing on tourism and technology.

<sup>23</sup> Johnston (2003).

entertainment for a whole range of products (even commodities), they have a hard time riding on the favorable images associated with the country (the main image of a "tropical country").

On top of the specific directions suggested by these findings, a reflection of country-branding strategies upon the data unveils new challenges, both practical and conceptual. For example, a question typical for most emerging markets across the globe is: if the standard assumption is that the stronger the country-image, the broader the range of opportunities to use it as a marketing tool, how, then, a country with an offer of a weak and single product image (or one-sided image) of its assets is expected to effectively take advantage of a country-branding initiative?

To summarize the main findings, we can state:

1. Countries within the same broad region elicit very different images both in content and in balance of positive-negative feelings. Still, in some cases, a lack of knowledge of neighboring countries represents both an alert and an occasion for carefully staged branding schemes. Whatever the branding initiative, the government should know that the level of awareness is low among the large consumer base of sister countries. One first step may be, indeed, to fight this unawareness.
2. Every country-branding campaign faces its own idiosyncratic challenges. Before anything else, Brazilians translate their top of mind thinking of their nation into their social deficits; Argentineans into parochial feelings and emotional ties; and Mexicans into a constellation of details of their quotidian life. This is an overall picture that does not match the primary goal of country brands so far defined by government plans. For example, the gap between the national (very positive) and foreign evaluation of Brazil's products is a warning sign to government and companies fighting for external markets.<sup>24</sup>
3. Bold consistencies appear in the form of country representation as competitive environments for leisure activities and travel destinations – a concept found across boundaries likely to encompass a core value of brand propositions, both domestically and internationally. Tourism seems, indeed, to be the main asset to be explored in the region.
4. Commodities are hegemonic in portraying the tradable world of these countries, regardless of the actual level of industrialization or the sharing of manufactured goods over the total output of the nation. Such leverage of commodity items should not merely mean a policy failure but should be approached as an opportunity to customize branding campaigns which help to raise country awareness and likeability. This in turn can seed future assessments for more complex goods and services. For instance, regarding the Brazilian context, having commodities associated with the country is not bad per se, since it is an exporting potency to these products, but, for example, ecology oriented products may find their way in this context and trace an upward path from commodities to products with more added-value.
5. Emerging and developed markets are perceived differently, based on how each country rates on specific domains. Such differences build particular images that highlight a type of offer and appeal, which cannot be ignored. It must be properly understood that the chances that each nation has of effectively presenting an identity (by emphasizing uniqueness) will give it an edge amidst the pressures of country predictability, global reach and access to disputed resources. Concerning the association of products to countries, we have seen in our context that the United States is benchmark, since surveyed publics directly associate brands (like Coca-Cola and Disney) to the country.

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<sup>24</sup> One interesting future step to make is to evaluate the perception gaps within the business world and how it is in line or not with the overall population and government efforts (or lack of efforts).

6. As we have seen, differentiation processes are present among the emerging countries such as those of Latin America, which share a common cultural matrix. This is what the diversity of assessments across markets point out. Their value strengths are different and, therefore, can help in building distinct proposals and country-branding initiatives.
7. In other words, no single path or model of successful country-branding must be accepted. Diversity abounds because the sources for branding are multiple and the policy priorities and local aspirations of countries are different.

In a globalized and increasingly homogeneous world, resorting to differences and country peculiarities seem to be a valid way of standing out from the crowd, adding specific value to the business equation of how a country inserts itself in the international arena. Here one finds the need to articulate efforts between government and companies to trace the most effective strategies. In that context, market research can help in identifying how the diversity of assets may become the source upon which to build a competitive offer; it can help in keeping an eye on the gaps and opportunities that appear during the growth and maturation process, as well as contributing in maintaining the lead afterwards.

#### *Insights for companies and product categories*

Another side of this same question involves the issue of potential image extensions to different product categories. To what extent can positive reactions to a country with commodity goods be extended to more complex categories, such as technological goods? We think that positive images can help develop first-time businesses and endorse SME strategies more effectively in the purse of new markets. Entry strategies for markets subjected to strong competition seem critically dependable on that country-branding effort. Yet this does not necessarily mean that halo effects may work across categories, or even across company strata or supply-chain players.

Going from the macro to the micro-business level, companies need to evaluate, in the decision to enter a new market, a series of elements going beyond what we have seen in this contribution. Yet, to use or not the *country of origin* as a marketing element may be part of the decisions one must make.<sup>25</sup>

We have used a *grid of analysis* of country assets which includes the evaluation of the countries as places to live, to travel, to study, its products and people. These dimensions<sup>26</sup> may permit the evaluation of country of origin marketing elements and may be of guidance to advertising efforts. Finally, focusing on responsive publics that may multiply branding efforts, the *Ambassadors*, may be a first step towards an effective entry (or consolidation efforts) in foreign markets.

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<sup>25</sup> There may be also the decision to use other country elements, or *cuckoo branding*, as stated by Simon Anholt. As simple examples, one may think of any pasta brand using color, name, packaging details, etc. related to Italy; perfume with France, and so on.

<sup>26</sup> One may think of other dimensions, general or particular, as well, according to the type of product and target public.

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## APPENDIX

Image associated to countries to "tourism", "products", "negative" and "positive". Coding grid:

### **Argentineans → Brazil**

- 1 - Tourism: includes 'tourism', 'beaches', 'Rio de Janeiro', 'Carnival', 'landscape', 'heat/sun', 'other tourism places', 'beauty'
- 2 - Products, other tradable: includes 'Soccer', 'joy', 'music', 'industry', 'women', 'people', 'fruits'
- 3 - Negative: includes 'violence', 'poverty', 'shantytown', 'corruption', 'drugs', 'racism'
- 4 - Positive or neutral: includes 'previous experience', 'people', 'politics', 'strong economy'

### **Argentineans → Mexico**

- 1 - Tourism: includes 'tourism', 'beaches', 'landscape', 'beauty', 'party', 'Aztecs, pyramids', 'culture', 'color'
- 2 - Products, other tradable: includes 'people', 'music', 'mariachis', sombrero (hat), 'tequila', 'typical food', 'joy', 'soap operas', 'soccer'
- 3 - Negative: includes 'violence', 'poverty', 'drugs', 'pollution', 'corruption', 'emigration', 'earthquake'
- 4 - Positive or neutral: includes 'previous experience', 'people', 'politics', 'look like Argentina / Brazil / the US', 'good country'

### **Argentineans → Argentina**

- 1 - Tourism: includes 'tourism', 'beaches', 'landscape', 'beauty', 'cities', 'Patagonia',
- 2 - Products, other tradable: includes 'people', 'music', 'beverages', 'food', 'agriculture', 'gauchos', 'soccer'
- 3 - Negative: includes 'violence', 'poverty', 'drugs', 'pollution', 'corruption', 'economic crisis', 'sadness'
- 4 - Positive or neutral: includes 'loves for the country', 'family', 'politics', 'progress', 'peace', 'good place to live', 'future'

### **Argentineans → US**

- 1 - Tourism: includes 'tourism', 'beaches', 'landscape', 'NYC', 'snow and cold', 'Disney', 'cities', 'white house', 'beauty', 'party'
- 2 - Products, other tradable: includes 'technology', 'skyscrapers', 'movies', 'TV shows', 'sport', 'music', 'industry'
- 3 - Negative: includes 'violence', 'war and terrorism', 'domination', 'drugs', 'racism', 'cold, stupid people', 'poverty', 'bad to live',
- 4 - Positive or neutral: includes 'previous experience', 'people', 'politics', 'strong economy', 'progress', 'education', 'organization, culture'

### **Brazilians → Brazil**

- 1 - Tourism: includes 'tourism', 'beaches', 'landscape', 'beauty', 'cities', 'Amazon', 'Rio de Janeiro',
- 2 - Products, other tradable: includes 'people', 'music', 'party', 'food', 'actors, soap operas', 'agriculture', 'soccer', 'women', 'oil and minerals'
- 3 - Negative: includes 'violence', 'poverty', 'drugs', 'corruption', 'lacks education', 'health issues', 'economic crisis', 'pollution'
- 4 - Positive or neutral: includes 'politics', 'progress', 'peace', 'good place to live', 'freedom', 'hard working people',

### **Brazilians → Mexico**

- 1 - Tourism: includes 'tourism', 'beaches', 'landscape', 'beauty', 'forest', 'desert'
- 2 - Products, other tradable: includes 'people', 'music', 'party', 'food', 'actors, soap operas', 'soccer', 'women', 'sombrero (hat)', 'beverages, tequila', 'dance', 'culture, pre-Colombian', 'bullfight', 'typical clothes'
- 3 - Negative: includes 'violence', 'poverty', 'corruption', 'US colony', 'war', 'pollution', 'natural disasters', 'bad weather', 'drugs'
- 4 - Positive or neutral: includes 'peace', 'progress', 'freedom', 'family', 'work'

### **Brazilians → Argentina**

- 1 - Tourism: includes 'tourism', 'cities and regions', 'landscape', 'cold and snow', 'beauty'
- 2 - Products, other tradable: includes 'people (positive)', 'music', 'food, agriculture', 'soccer', 'party', 'wine', 'import', 'clothes, wool, leather', 'trade'
- 3 - Negative: includes 'violence', 'poverty', 'people (arrogant)', 'corruption', 'war', 'drugs', 'economic crisis', 'corruption', 'smuggling', 'revolt'
- 4 - Positive or neutral: includes 'progress', 'richness', 'good place to live', 'national symbols', 'peace', 'education'

**Brazilians → US**

- 1 - Tourism: includes 'tourism', 'cities and tourism places', 'Disney', 'cold and snow', 'beauty'
- 2 - Products, other tradable: includes 'music', 'food', 'clothing and shoes', 'technology', 'sports'
- 3 - Negative: includes 'violence', 'people (dominant, stupid)', 'self-centered', 'corruption', 'war and terrorism', 'sadness', 'racism'
- 4 - Positive or neutral: includes 'progress', 'richness', 'good place to live', 'national symbols', 'education', 'people (intelligent, hard working)' 'freedom'

**Mexicans → Brazil**

- 1 - Tourism: includes 'tourism', 'beaches', 'landscape', 'beauty', 'Carnival' 'cities', 'Amazon', 'tropical heat'
- 2 - Products, other tradable: includes 'people', 'music', 'party', 'food', 'joy', 'soccer', 'women', 'coffee', 'tobacco', 'culture'
- 3 - Negative: includes 'violence', 'poverty', 'economic crisis',
- 4 - Positive or neutral: includes 'politics', 'language'

**Mexicans → Mexico**

- 1 - Tourism: includes 'tourism', 'beaches', 'landscape', 'beauty', 'forest' 'desert', 'cities', 'volcanoes'
- 2 - Products, other tradable: includes 'people', 'music', 'party', 'food', 'sombbrero (hat)', 'beverages, tequila', 'dance', 'culture, pre-Colombian', 'bullfight', 'typical clothes', 'handcraft'
- 3 - Negative: includes 'violence', 'poverty', 'corruption', 'pollution' 'unemployment', 'sadness'
- 4 - Positive or neutral: includes 'political symbols', 'progress', 'peace', 'richness'

**Mexicans → Argentina**

- 1 - Tourism: includes 'tourism', 'cities' 'landscape', 'beauty' 'see' 'cold and snow'
- 2 - Products, other tradable: includes 'people (positive)', 'music', 'food', 'coffee', 'soccer', 'party', 'clothes, wool, leather', 'actors'
- 3 - Negative: includes 'poverty', 'people (arrogant)' 'economic crisis', 'unemployment'
- 4 - Positive or neutral: includes 'progress', 'good place to live', 'language', and 'national symbols'

**Mexicans → US**

- 1 - Tourism: includes 'tourism', 'cities', 'Disney', 'cold and snow', 'beauty' 'nature'
- 2 - Products, other tradable: includes 'music', 'food', 'clothing and shoes' 'technology' 'sports' 'cinema and TV', 'buildings'
- 3 - Negative: includes 'violence', 'people (dominant, stupid)', 'self-centered', 'corruption', 'war and terrorism', 'racism', 'drugs'
- 4 - Positive or neutral: includes 'progress', 'richness', 'economy', 'good place to live', 'national symbols', 'education', 'freedom' 'clean country' 'neighbors' 'language'

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