

FutureBrand Country Index

2019



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Looking beyond measures of might to determine country strength



In our eighth edition of the FutureBrand Country Index (FCI), we examine what transforms a country from a spot on a map to a place our survey respondents ultimately want to invest in, live in, visit, and buy goods and services from.*

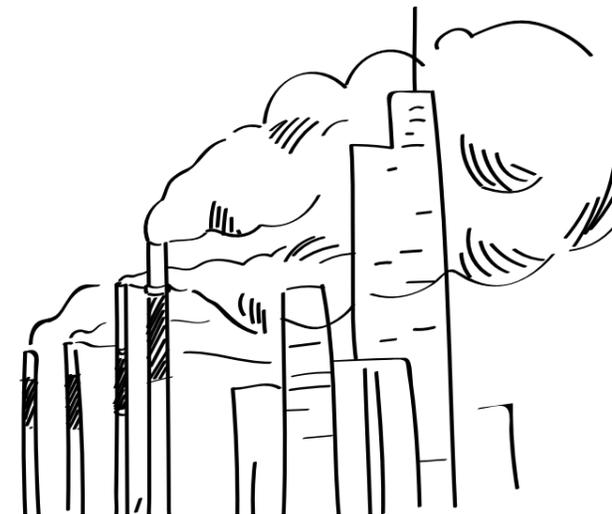
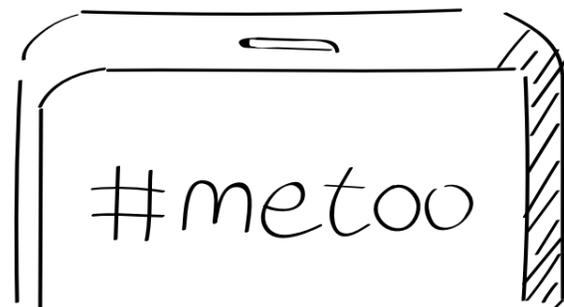
Countries have traditionally been measured and ranked by measures of might — GDP, population size, even a sovereign's nuclear arsenal. However, in the current day when our world is defined by rapid change, do these measures continue to make sense in the ranking of nations?

Technology trends are changing the world we live in: IoT, smart technology, the advent of 5G. Sociopolitical shifts are reshaping how we live in ways big and small. Countries are grappling with topics such as immigration, gun rights, and social safety net provisions like healthcare and education.

Weighing in on the global dialogue for gender equality triggered by #metoo and the call for allies in the United Nation's HeForShe global solidarity movement calls on nations in a different way than ever before. Our natural world is rapidly transforming too: The World Meteorological Organization reports that climate change continues to accelerate. Our passion for convenience contributed to the creation of the Great Pacific Garbage Patch, the largest accumulation of ocean plastic in the world – approximately twice the size of Texas or three times the size of France – floating between Hawaii and California.

When we consider the confluence of these factors, we are forced to discard the historical paradigm for measuring country strength – GDP growth. Against this complex reality, it feels insufficient. Instead, we are compelled to consider how countries react, strike balance, and even thrive in today's new dynamic.

Narrowing in on how countries are faring, FutureBrand answers the question of what makes a country strong or weak by upending traditional metrics, and introducing a new framework: Countrymaking.



Countrymaking represents an optimized national playbook of shared beliefs, rooted in Purpose and Experience, to shift global perception with the explicit goal of boosting tourism, investment, and consumer choice for a country's goods and services.

In this way, Countrymaking acts as an equalizing force, placing countries with smaller GDPs on comparable footing with more traditionally dominant nations. And the net effect establishes an entirely new world order.

What's different in 2019

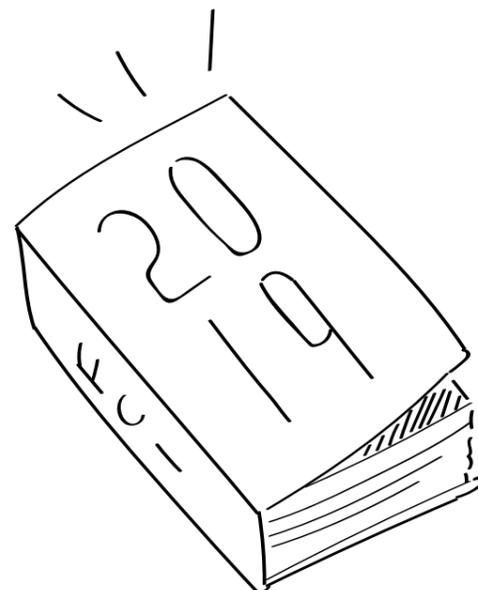
For the first time, our 2019 Index uses the World Bank's top 75 countries (by GDP) as its basis, and re-orders it based on how individuals rate dimensions of a country's Purpose and Experience – the anchors for our country brand study. The higher a country scored on these dimensions, the higher it climbed in the ranking. The last FutureBrand Country Index was conducted in 2014; however, the sample set at that time was not based on the World Bank ranking.

Dimensions of purpose

1. Value System
2. Quality of Life
3. Business Potential

Dimensions of experience

4. Heritage & Culture
5. Tourism
6. Made In (Products & Services)



The three benefits of the FCI

Quantify the power of a country's "brand":

The statistical analysis we've done shows that brand reputations can be defined, measured, and (perhaps most important) managed by focusing on the key drivers of support.

Offer a framework for measuring perception – and decisions: The six dimensions of a country brand represents our proven "model" that identifies how brand drives outcomes (i.e., "recommend," "consider"). As we deepen our understanding of what defines a country brand, we can tailor this framework to individual countries.

Measure "what matters" over time: With eight studies under our belt, and the most recent two that utilize the same model (2014 and 2019), we have the beginning of a longitudinal study that can provide normative benchmarking to explain what "good" or "bad" looks like in country brand building.

02

Methodology

FutureBrand Methodology

To field the research our external research partner, QRi Consulting, conducted a 15-minute online self-completion interview with fieldwork taking place during January and February 2019.

Global Sample n=2,500

North America 525

United States 400, Canada 125

Latin America 525

Brazil 192, Argentina 167, Mexico 166

Europe 550

UK 138, Germany 138, France 137, Russia 137

Middle East and Africa 400

Turkey 150, South Africa 150, UAE 100

Far East 500

India 100, China 100, Thailand 100, Japan 100, Australia 100

Based on an 'Informed Opinion Global Sample' of n=2,500

- 75 countries evaluated, each respondent rated 7 countries each, thus each country is rated by c.230 respondents
- Aware of and familiar with at least 7 countries covered
- Interested in travel abroad
- Have traveled internationally at least once in the last year, mix of business and/or leisure
- 21-65 yrs, A, B, C1
- Balanced between males and female

Weber Shandwick Methodology

Social Analytics and Data Visualisation conducted by Weber Shandwick. In depth analysis of in country perception versus external perceptions within social media.

The Weber Shandwick Analytics team analysed social media conversations across the top 10 countries (Japan, Norway, Switzerland, Sweden, Finland, Germany, Denmark, Canada, Austria, and Luxembourg) and across 8 languages.

The team used linguistic analysis to identify and quantify the same six dimensions explored within the survey data (Values System, Quality of Life, Business Potential, Heritage & Culture, Tourism, Products & Services) and to explore additional sub topics within each dimension—such as natural beauty, food, tolerance, and political freedom. They also quantified countries' brand strength by comparing their “online talkability.”

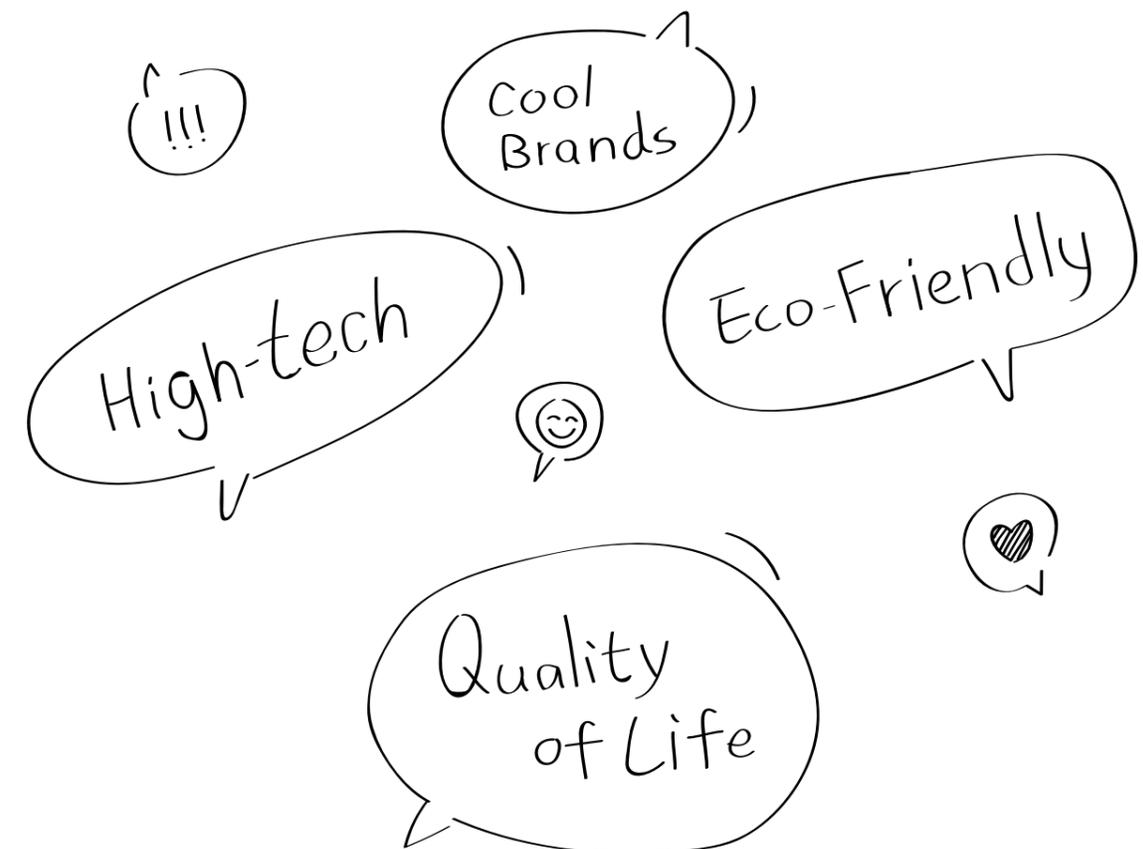
The team used data visualisation software provided by Quid Inc. to map and identify relationships in how consumers naturally discussed the six key dimensions of purpose and experience and the key sub topics associated within these six overarching themes.

To compare in market versus external perceptions of the top 10 countries, Weber Shandwick compared the conversational themes, topics, and sentiment within the local market and in the local language versus the global English language conversation.

To remove platform biases (e.g., people on Instagram tend to post more about food and nature regardless of the country), the team looked at relative differences between countries.

To remove the impact of population size, Weber Shandwick quantified each country's brand strength by comparing mentions received per 1,000 internet users.

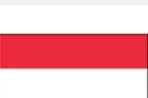
The analysis covers the period between January and December 2018.



03

2019 Country brand ranking

Global Top 75

Ranking	Point Change from 2014	Country	World Bank	Region
			Ranking	
2019			2019	
1	=	 Japan	3	Asia Pacific
2	+4	 Norway	28	Europe
3	-1	 Switzerland	20	Europe
4	=	 Sweden	22	Europe
5	+8	 Finland	42	Europe
6	-3	 Germany	4	Europe
7	+2	 Denmark	35	Europe
8	-3	 Canada	10	North America
9	+1	 Austria	27	Europe
10	-	 Luxembourg	73	Europe

Ranking	Point Change from 2014	Country	World Bank	Region
			Ranking	
2019			2019	
11	=	 New Zealand	50	Asia Pacific
12	-5	 United States	1	North America
13	+3	 Netherlands	18	Europe
14	+4	 Italy	9	Europe
15	-7	 Australia	13	Asia Pacific
16	+3	 UAE	29	Middle East
17	=	 France	7	Europe
18	-4	 Singapore	36	Asia Pacific
19	-7	 United Kingdom	5	Europe
20	=	 South Korea	12	Asia Pacific

Global Top 75

Ranking	Point Change from 2014	Country	World Bank	Region
			Ranking	
2019			2019	
21	+1	 Belgium	24	Europe
22	+4	 Israel	31	Middle East
23	=	 Spain	14	Europe
24	-	 Hong Kong, China	33	Asia Pacific
25	+2	 Portugal	46	Europe
26	-2	 Qatar	54	Middle East
27	+4	 Russia	11	Europe
28	-	 Kuwait	58	Middle East
29	-1	 China	2	Asia Pacific
30	+9	 Saudi Arabia	19	Middle East

Ranking	Point Change from 2014	Country	World Bank	Region
			Ranking	
2019			2019	
31	+3	 Oman	71	Middle East
32	-3	 Czech Republic	47	Europe
33	-12	 Ireland	34	Europe
34	-4	 Greece	51	Europe
35	+24	 Slovakia	64	Europe
36	+6	 Argentina	21	Latin America
37	+12	 Peru	49	Latin America
38	+18	 Hungary	56	Europe
39	-1	 Thailand	25	Asia Pacific
40	+13	 Turkey	17	Europe

Global Top 75

Ranking	Point Change from 2014	Country	World Bank Ranking	Region
41	+9	 India	6	Asia Pacific
42	+20	 Romania	48	Europe
43	+3	 Chile	41	Latin America
44	+1	 Poland	23	Europe
45	+3	 Malaysia	37	Asia Pacific
46	-5	 Panama	74	Latin America
47	-4	 Brazil	8	Latin America
48	-	 Cuba	66	Latin America
49	-	 Myanmar	72	Asia Pacific
50	-13	 Costa Rica	75	Latin America

Ranking	Point Change from 2014	Country	World Bank Ranking	Region
51	-11	 South Africa	32	Africa
52	-	 Ethiopia	67	Africa
53	-	 Ecuador	63	Latin America
54	+9	 Colombia	39	Latin America
55	-1	 Egypt	44	Africa
56	+10	 Indonesia	16	Asia Pacific
57	-	 Guatemala	69	Latin America
58	+2	 Sri Lanka	65	Asia Pacific
59	-	 Kazakhstan	55	Asia Pacific
60	-	 Algeria	53	Africa

Global Top 75

Ranking	Point Change from 2014	Country	World Bank	Region
			Ranking	
2019			2019	
61	+3	 Vietnam	45	Asia Pacific
62	-29	 Puerto Rico (U.S. territory)	62	North America
63	-2	 Kenya	70	Africa
64	-9	 Mexico	15	Latin America
65	-	 Sudan	59	Africa
66	-9	 Morocco	61	Africa
67	-	 Philippines	38	Asia Pacific
68	+7	 Nigeria	30	Africa
69	-	 Angola	57	Africa
70	-	 Dominican Republic	68	Latin America

Ranking	Point Change from 2014	Country	World Bank	Region
			Ranking	
2019			2019	
71	+1	 Bangladesh	43	Asia Pacific
72	-1	 Iran	26	Middle East
73	=	 Pakistan	40	Asia Pacific
74	=	 Ukraine	60	Europe
75	-	 Iraq	52	Middle East

04

From Placemaking to Countrymaking

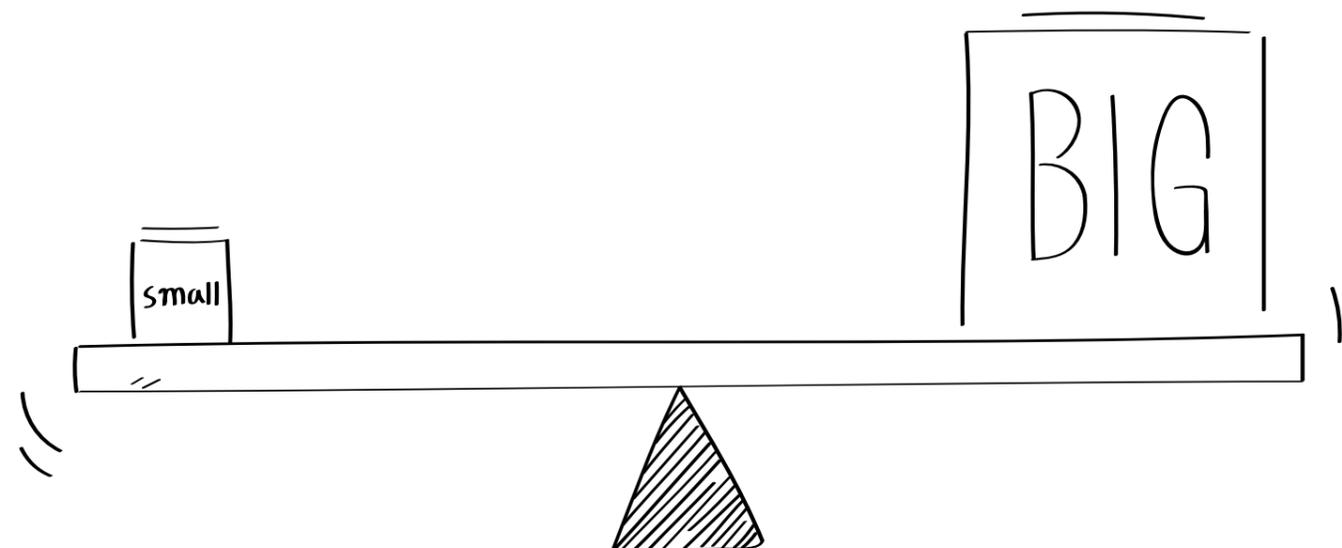
This year, we were inspired by the idea of Placemaking.

After all, a country is the ultimate (un)planned society serving a nation of communities. Placemaking draws on the power of the collective to build better neighborhoods, cities, or regions by putting public spaces at the heart of communities. Through Placemaking, we can shape our public realms in order to maximize shared value.

We assert that “Countrymaking,” represents an optimized national playbook of shared beliefs rooted in Experience and Purpose to shift global perception with the explicit goal of boosting tourism, investment, and consumer choice for a country’s goods and services.

Countrymaking unveils a potential new world order, as countries with much smaller GDPs can now realistically challenge traditionally dominant nations. This upends the playing field when it comes to attracting everything from tourists to significant inward investment.

In today’s dynamic global reality, the new yardstick for measuring extends beyond national prosperity. These shared beliefs compel governments to have more than a social safety net for society’s least equipped. They must now also strive to create a high Quality of Life for all.



As we look to our leading countries, we see a powerful link between our Index survey respondent's daily choices and their perception of a country. **This year, Japan tops our Index once again, with Norway and Switzerland claiming the #2 and #3 spots, respectively.** Global trends such as mindfulness, conscious consumerism, experience as the new currency, the growth of the gig economy and remote working both aided by advances in technology, reflect a big change in the small decisions our survey participants are making in their everyday lives.

These personal choices — such as the growth of permealancing, rise in agrihoods, or decline of single-use plastic — all suggest a **premium that is being placed not on living richer, but on living a richer life.** And these individuals are making personal choices to live richer lives now, not in their distant retirement.

These personal choices, when scaled to a national level, reflect the power of the collective and their shared beliefs — for those living within a country and those outside its borders. Our survey respondents are choosing, even favoring, cities and countries that align with their choices and beliefs about lifestyles, values, the environment, and technology.

Enabled by technological advancements, individuals have the freedom now more than ever to make choices to live, work, and play where they choose. Instead of flocking to the big “money center cities” like New York and London, the money is following the people, as we see favorable perception rise in countries such as Norway, Finland, Austria, and Luxembourg which earned spots in the top 10 of the Index for their high quality of life.

What we are seeing play out with these personal choices and shared beliefs is a pronounced shuffling in the global ranking of nations. Japan, as an established G7 nation, serves as a

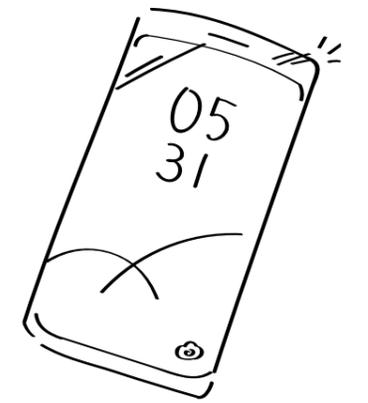
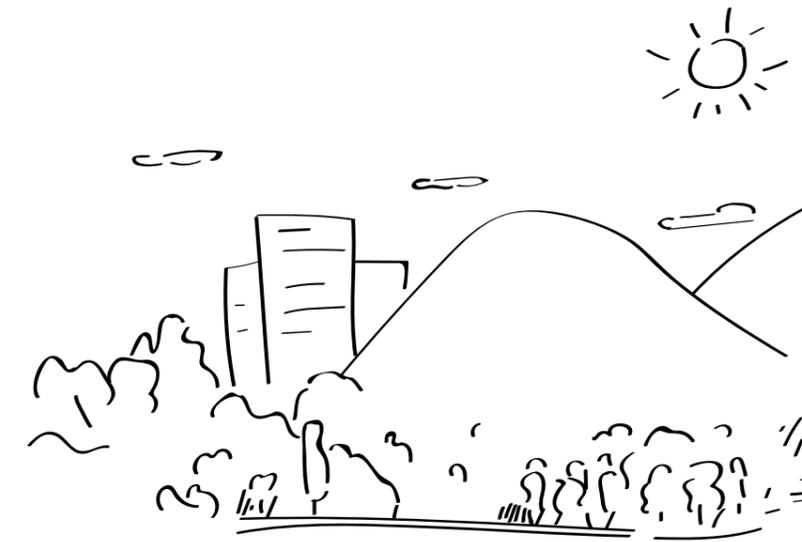
compelling proof point of Countrymaking in action. Striking an impressive balance, Japan bears the traditional measure of might — strong GDP — but also compelling Purpose- and Experience-related measures earning global favor and the #1 Index spot. Germany and Canada follow similar patterns with their #6 and #8 Index rank, respectively.

In our report, we'll reveal what's at work in each of the top 10 countries in our Index. But first, we present the blueprint for Countrymaking focusing on four key levers for driving perception, based on the findings of this year's study.



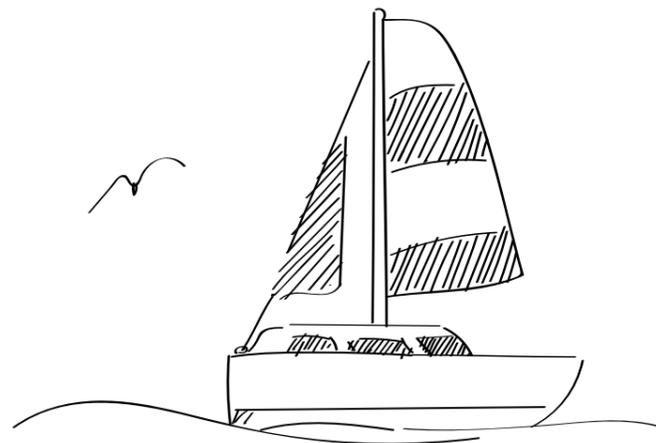
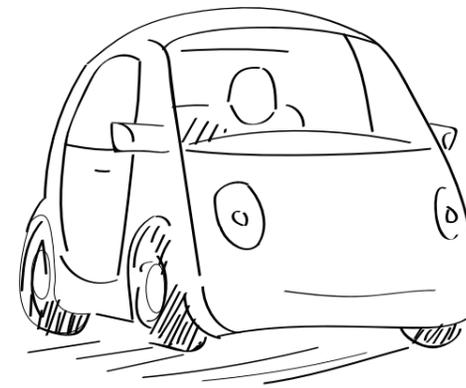
05

Countrymaking: The blueprint





Made In
A Wonderful Place
by wonderful people



While all of the dimensions of Purpose and Experience are important to country brand strength, this year **we zoom in on four that prove the most powerful in influencing perception – both positive and negative – and driving behavior.** Our 2019 study reveals how survey respondents perceive a country's **Environmental Friendliness (an attribute of Value System), the Quality of Life its people enjoy, and the Products & Services that country produces (Made In) have the greatest positive influence** when it comes to the places where they choose to spend their time and money.

On the other hand, we found that a **country's polarizing politics and a low measure in Tolerance can negatively influence a country's overall perception and degrade country brand strength.**

It makes sense that a **country's product (Made In) becomes a representation of a place, and people have a favorable perception (or not) based on this.** But other factors, such as politics, reveal just how important it is that a person share beliefs with a place in order to invest in it or want to visit. It's the difference between whether or not they can see themselves surviving in another country (Quality of Life) or thriving there (Value System). The difference between whether they see a country as an inviting tourist destination, or a self-interested isolationist (polarizing politics).

Builders of country brand strength

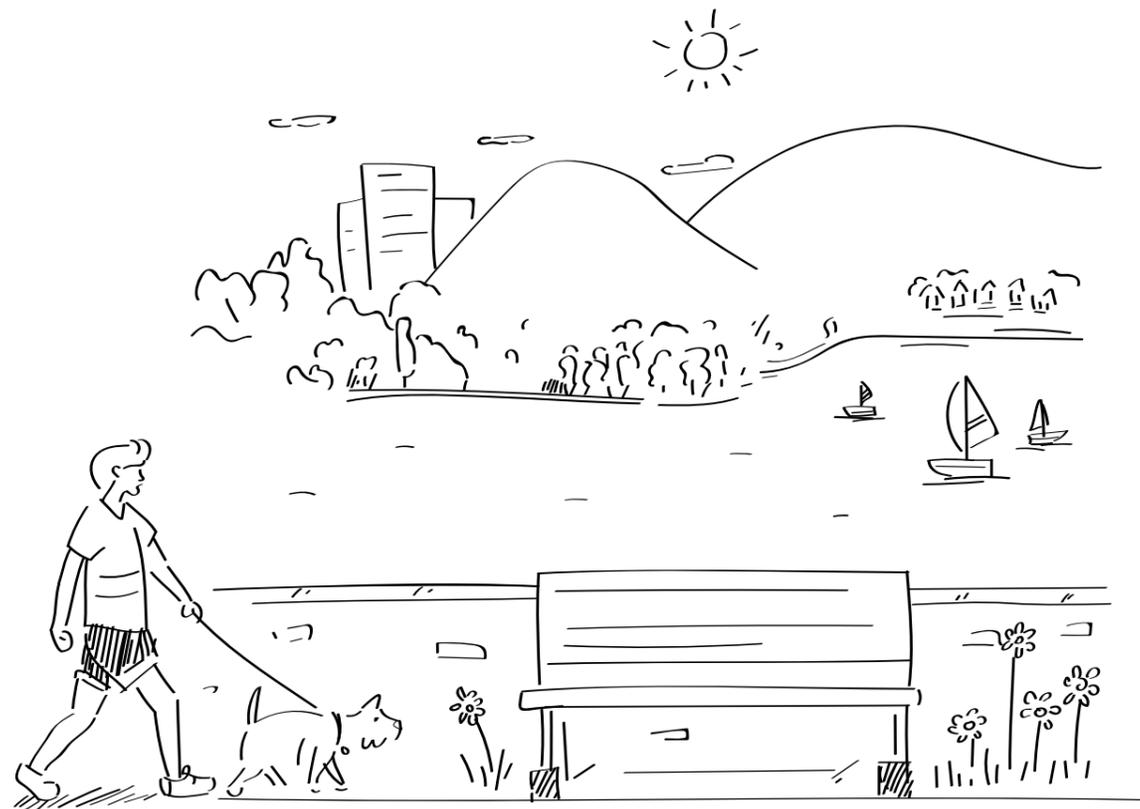
1. Environmental Friendliness
2. Quality of Life
3. Made In (Products & Services)

Barriers of country brand strength

4. Business Potential and Tourism:
Polarizing Politics/Tolerance

Lever #1 – Quality of Life

The new pursuit: Living richly, not just living a rich life



The Fourth Industrial Revolution, defined by dynamic technology changes, has transformed our day-to-day reality: a freelancer can sit in a co-working space delivering work to a client via 5G. A person can subscribe to a car instead of owning one. A traveler can see a new place through the eyes of a local by renting an apartment instead of a hotel room. Brands across hospitality, technology, and transportation are reinventing industries: Airbnb, WeWork, and car2go are just a few examples of brands enabling people to live with more flexibility, discovery, and ease.

Netflix, a new entrant and #15 on our 2018 FutureBrand Index, is an apt example: it forces incumbent brands like Disney (#1) to meet customers where they are. The upcoming Disney+ platform will offer subscription, on-demand content, following the new standard Netflix set.

In this #yolo era, many believe that to build lives of high quality, they need a mix of flexibility, freedom, and authentic experiences. The term “quality of life” itself has taken on renewed significance and greater importance. The net effect is individuals are not waiting for a delayed period such as retirement to live better but are finding ways to do so every day.

Since our 2014 study, we have seen evidence that Quality of Life is an increasingly critical factor in the personal calculus of a country, relative to other dimensions of Purpose and Experience. For country brands, this paradigm shift means it's more important than ever to showcase the ability to look after the safety, well-being, and happiness of its people. With an emphasis on all people, not just select socioeconomic tiers.

When measuring a country, Quality of Life: its sub-measures of Health & Education, Standard of Living, Safety & Security, and Desire to Live/Study are important factors. For the leading countries such as Japan, Norway, Switzerland, Sweden, and Canada – nations known to offer greater access to healthcare, education, and less income disparity – living well appears to be attainable for the many, not just for the few.

Looking at the highest and lowest ranked countries in our Index shines a light on just how influential Quality of Life is: among the top 10 countries in the 2019 Index, the Quality of Life dimension averaged highest of all attributes measured while in the bottom 10 countries, it averaged lowest of all attributes. **In this way, Quality of Life may act as a litmus test for overall country brand strength: we observed that when it's perceived as strong, a country's perception tends to be high, and when it's perceived as weak, perception tends to suffer.**

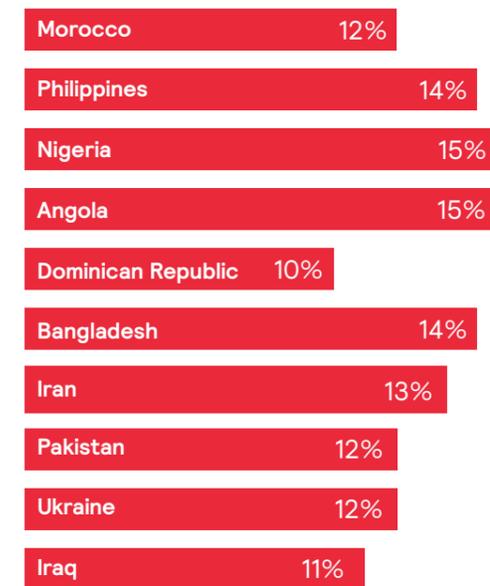
Top 10 countries 2019 Quality of Life score*



27% Group Average of 75 Countries

*Average percentage of respondents who rated "Performs very strongly" based on the following statements: "How does this country rate on: Health & Education? How does this country rate on: Living Standard? How does this country rate on: Would Like to Live In/Study There? How does this country rate on: Safety & Security?"

Bottom 10 countries 2019 Quality of Life score*



27% Group Average of 75 Countries

*Average percentage of respondents who rated "Performs very strongly" based on the following statements: "How does this country rate on: Health & Education? How does this country rate on: Living Standard? How does this country rate on: Would Like to Live In/Study There? How does this country rate on: Safety & Security?"

Slovakia and Finland come in as the top risers within Quality of Life, improving perceptions 10 points between 2014 and 2019.

In both countries, the rate of secondary education is about 90%, higher than the OECD country average of 74%. Finland, considered the world's happiest country for the past two years according to the UN's World Happiness Report, offers universal healthcare, which is widely appreciated by their citizens, who report satisfaction levels nearly double those of the EU average.

That comes in stark contrast with the US, where universal healthcare is a hotly debated political issue, and where maternal mortality rates are the highest of any developed nation – potentially a sobering symptom of a troubled healthcare system. Slovakia represents the fastest-growing developed country in the world, and takes conscious steps to ensure its citizens benefit from its economic growth, for example, by increasing the minimum wage to over 500 Euros per month in 2019, thus allowing for a living wage.

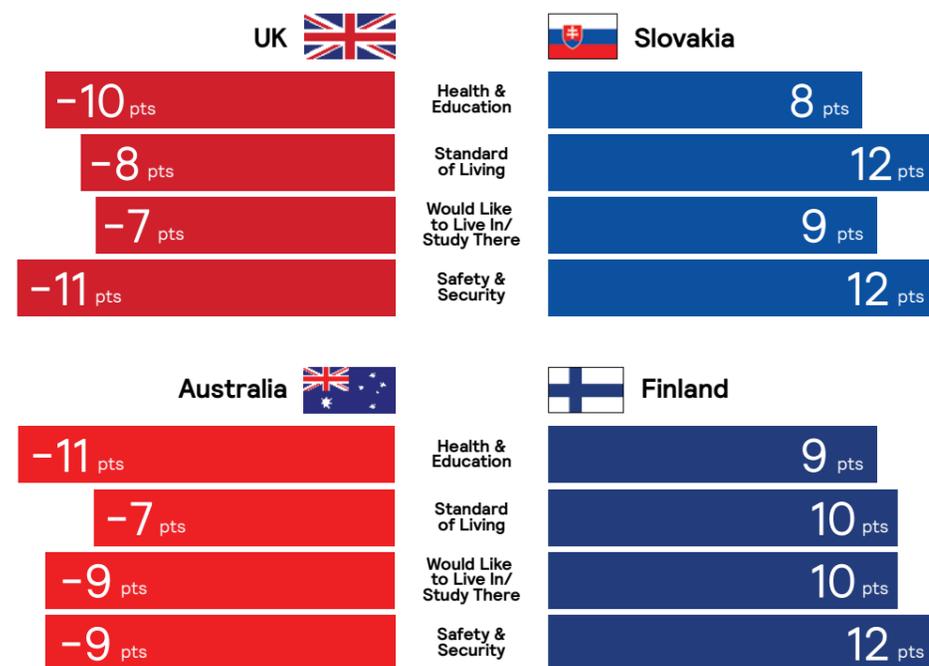
The UK and Australia did not fare as well: Quality of Life perceptions degraded most for these two countries, each dropping 9 points since 2014. High cost of living may explain the drop: disposable income per household has been steadily dropping in the past five years in both countries. In Australia, homelessness is on the rise due to a lack of affordable housing, increasing by up to 70% over the past decade in New South Wales (as reported by The Conversation).

In the UK, the number of children in absolute poverty is rising, with more children residing in households that cannot maintain basic shelter, clothing, and food due to low income (as reported by The Independent, based on government data). As both countries lean more populist, are potential visitors, investors, and residents noticing a growing wealth divide and influencing perceptions of each country's Quality of Life?



When a country is able to promote a high Quality of Life, it's easy to understand the likely positive effect on tourism: travelers may want to capture a piece of "the good life" for themselves. But the positive halo extends to business as well. According to our study, a link was observed between a person's desire to live or study in a place and their likelihood to recommend it as a good place to do business.

Change in Quality of Life attributes from 2014 to 2019



Nestlé highlights this virtuous relationship: their corporate purpose is defined as “Enhancing quality of life and contributing to a healthier future” – a goal that has undoubtedly come from its Swiss provenance that has the potential to attract future employees to join the company (and the country).

As our world becomes more connected and complex, countries that take decisive action to prioritize Quality of Life will prevail. Ranked #11 in this year's Index, New Zealand is paving the way with a national budget based not on traditional measures like productivity and economic growth, but on goals that encourage the well-being of citizens. Under this policy recently introduced by Prime Minister Jacinda Ardern, spending must advance priorities that include improving mental health, reducing child poverty, addressing inequalities, thriving in a digital age, and transitioning to a low-emission economy. These forward-looking policies will not only safeguard New Zealand's people, but likely attract future visitors, investors, and citizens.

In their decisions of where to live, work, study, play, and invest, people won't follow the money, but rather, will seek places that offer higher quality of life – and make the money follow them.

Lever #2 – Environmental Friendliness

Operation rescue earth



In the last year alone, we've witnessed some of the most ravaging natural disasters in living memory from forest fires in the Arctic Circle to the cyclone in Mozambique. As climate change becomes a dire global concern, it's no surprise that perceptions of a country's Environmental Friendliness drive decision-making about business and leisure in 2019.

As many countries grapple with the trade-offs between economic growth, human well-being, and a sustainable future, governments and brands alike are being challenged to make Environmental Friendliness part of their agendas. And it's clear perception matters. Consider Japan.

Japan is one of the top 10 producers of CO2 emissions worldwide, yet it also demonstrated the biggest improvement in perception on Environmental Friendliness in the 2019 Country Index; so much so, that it now ranks in the top-quartile on this measure.

Top 10 biggest gains in Environmental Friendliness

Point Change	Score*	Country	FCI Ranking	World Bank Ranking
From 2014	2019		2019	2019
+14	56%	Japan	1	3
+12	60%	Finland	5	42
+12	65%	Norway	2	28
+11	19%	Nigeria	68	30
+10	55%	Denmark	7	35
+9	22%	Romania	42	48
+9	59%	Sweden	4	22
+8	29%	Oman	31	71
+8	29%	South Korea	20	12
+7	23%	Slovakia	35	64

*Percentage of respondents who rated "Performs very strongly" based on the following statement: "How does this country rate on: Environmental Friendliness?"

Since the Fukushima nuclear disaster in 2011, plans for decarbonization took a step backward as Japanese power plants expanded their use of fossil fuels. Yet as Japanese citizens have expressed concerns over severe weather, the government pledged to reduce greenhouse gas emissions by 26% before 2030. **The government has listened, and the world has noticed.**

Following the lead of the Japanese government, some of the country's biggest brands are publicly putting the environment first: Sony recently announced its "Road to Zero" initiative which aims to reduce its carbon footprint to "Zero" by 2050, and Toyota's "Environmental Challenge 2050" aims for zero carbon emissions from all vehicles by 2050. Considering the importance of Environmental Friendliness in driving perception, we expect that these initiatives will provide positive reputation capital for those brands in the future.

However, the US government took a different tack. Despite 13 federal departments reporting on the likely increase of destructive weather events affecting the United States, the current administration continues to increase fossil fuel use, and scrapped many environmental regulations (seen as “impediments to business”). **In this year’s Index, the US fell more than any other country on Environmental Friendliness (down 9 points from 2014).**

In 2019’s Index, perceptions of a country’s Environmental Friendliness, correlate highly with perceptions of Health & Education, Standard of Living, and Advanced Technology. Looking at the top four risers of Environmental Friendliness (Japan, Finland, Norway, and Nigeria), we see that each country shows either significant improvement or trends upward on each of these perceptions.

Attributes that highly correlate with Environmental Friendliness

Country	Health & Education		Living Standard		Advanced Technology	
	Point Change from 2014	Score* 2019	Point Change from 2014	Score* 2019	Point Change from 2014	Score* 2019
Japan	+5	64%	+5	59%	+2	80%
Finland	+9	62%	+10	62%	+13	55%
Norway	+8	68%	+4	68%	+10	51%
Nigeria	+6	15%	+7	14%	+9	15%

*Percentage of respondents who rated “Performs very strongly” based on the following statements: “How does this country rate on: Health & Education? How does this country rate on: Living Standard? How does this country rate on: Advanced Technology?”

Focusing on the environment and attracting technological innovation seems to pay off; Nigeria’s jump of seven places in the 2019 Index highlights the interplay between perceptions of environmental value, living standards, business potential, and how they’ve contributed to Nigeria’s socioeconomic development.

Nigeria’s improvement in the ranking overall and specifically regarding the environment is worth noting. The country’s massive economic potential was historically constrained by broader issues such as joblessness in rural areas, a lack of adequate energy supplies, and access to clean water. But Nigeria more recently attracted investment to solve these issues, and their government also began issuing green bonds for climate solutions which could inform perceptions of the country overall.

Tech brands need to focus on the Purpose behind their technologies (2018 FutureBrand Index), and Facebook’s presence in Nigeria has resulted in the development of tech center partnerships with local companies that focus on innovation, business education, and digital literacy. These initiatives promote start-ups, and also the growth of Developer Circles to provide networking opportunities, classes, and training to organically stimulate entrepreneurship through strategically placed “hubs” that connect larger cities with rural areas.



Lever #3 – Made In

Products & Services: The badges of a country



The 2019 Index reveals that individuals more likely to buy products or services Made In a specific country are also more likely to recommend that country to visit, would consider it for business, and also consider living in or studying there.

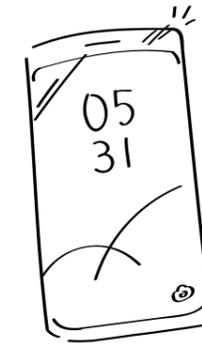
A product or brand serves as a powerful symbol of social advancement for a country, and even influences a person's decision to work, live, or play there. In this year's study High-Quality Products correlates with Good Infrastructure, Advanced Technology, Health & Education, and Living Standard – meaning high-quality products come from countries that ensure a high quality of life.

Top 10 biggest gains in Quality Products

Point Change from 2014	Score* 2019	Country	FCI Ranking 2019	World Bank Ranking 2019
+13	41%	Israel	22	31
+13	27%	Slovakia	35	64
+11	40%	Belgium	21	26
+10	24%	Turkey	40	17
+10	28%	Saudi Arabia	30	19
+10	23%	Hungary	38	56
+9	16%	Vietnam	61	45
+9	19%	Iran	72	26
+9	41%	Italy	14	9
+9	19%	Pakistan	73	40

*Percentage of respondents who rated "Strongly agree" based on the following statement: "This country makes products of high quality."

Slovakia, as one of the newest countries in the world that saw a precipitous rise in the FCI ranking (up 24 places to #35), demonstrates the highest improvement in the perceived quality of its products and services, as well as perceived Quality of Life measures. This shift could also explain the movement of manufacturers like Volkswagen, Peugeot-Citroen, and KIA to the country.



The rise in Quality Products and perceived Quality of Life for Slovakia

Country	Quality Products		Health & Education		Living Standard	
	Point Change from 2014	Score* 2019	Point Change from 2014	Score* 2019	Point Change from 2014	Score* 2019
Slovakia	+13	27%	+9	59%	+12	80%

* Percentage of respondents who rated "Strongly agree" based on the following statement: "This country makes products of high quality."
 ** Percentage of respondents who rated "Performs very strongly" based on the following statements: "How does this country rate on: Health & Education? How does this country rate on: Living Standard?"



Tourism historically serves as a vital component of Israel's GDP but in recent years, the country further developed its reputation with start-ups and ground-breaking R&D. Tech companies like Microsoft, Apple, Amazon, Google, Facebook, Alibaba, Intel, Oracle, Samsung, and Baidu are all conducting critical development work in Israel. In April of last year, Google picked Tel Aviv to build a new accelerator to assist start-ups that specialize in machine learning, artificial intelligence, and data science. Considering that Google can attract top talent from anywhere in the world, it's telling that it chose Tel Aviv as a key development hub in an area of such deep focus for the company.

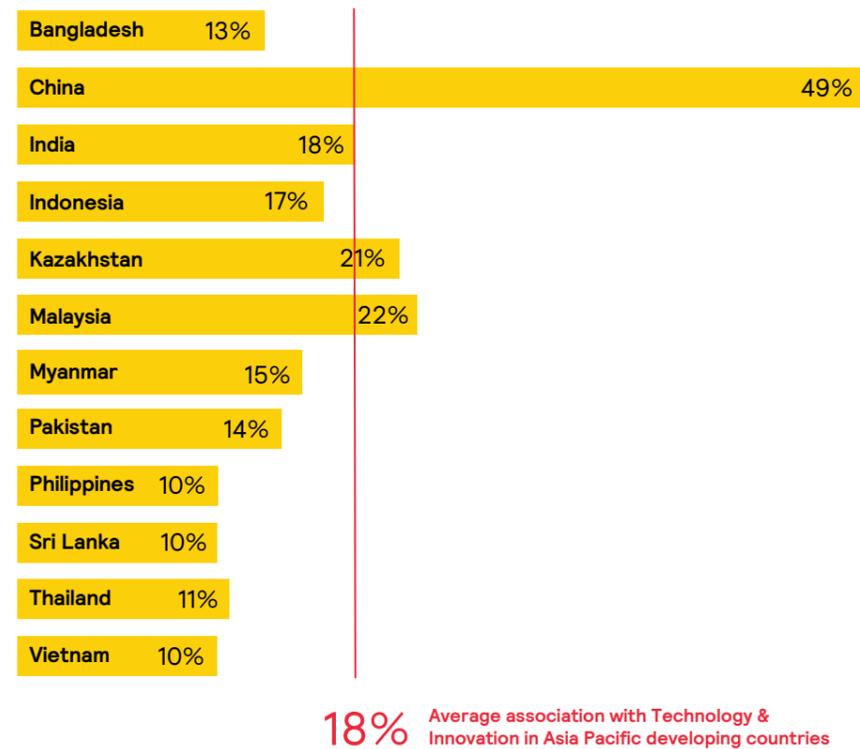
The rise in Quality Products and Technology & Innovation for Israel

Country	Quality Products		Good Infrastructure		Advanced Technology	
	Point Change from 2014	Score* 2019	Point Change from 2014	Score* 2019	Point Change from 2014	Score* 2019
Israel	+13	41%	+10	41%	+11	50%

* Percentage of respondents who rated "Strongly agree" based on the following statement: "This country makes products of high quality."
 ** Percentage of respondents who rated "Performs very strongly" based on the following statements: "How does this country rate on: Good Infrastructure? How does this country rate on: Advanced Technology?"

Countries like China recognize the power of linking positive perception between brands and country of origin to drive their overall reputation. **President Xi Jinping’s “Made in China 2025” program attempts to move China’s reputation away from being the world’s factory to producing higher value products and services.**

China has a higher association of Technology & Innovation versus other regional developing countries



The success of this effort shows through the sheer number of Chinese brands included in the recent FutureBrand Index where we’ve seen companies like Kweichow Moutai – a relatively unknown alcohol brand outside of China – rank #2 in 2018. Or Huawei building its reputation internationally as a technology leader by combining higher-value products and services with improved brand Purpose to shift perceptions.

Now that China’s goal is set, this could pave the path for China to improve its FCI ranking (29th this year), and break into the top third.

The knock-on effect



In our 2014 study, we pointed to Extremism and Migration as dominant themes informing the future. Five years later, our current study reveals the impact of these themes on perception of countries such as the US and UK. With both nations grappling with populist factions, stinging headlines, and wavering public approval, our survey respondents perceived these leading countries in a sharply less favorable light across all meaningful measures. In this year's Index, the US fell 5 spots to 12 and UK fell 7 spots to 19.

FutureBrand Country Index ranking

Country	FCI Ranking		World Bank Ranking 2019
	From 2014	2019	
United States	-5	12	1
United Kingdom	-7	19	5

Despite their GDP strength, these traditional “world powers” are not winning on perception as respondents showed less emotional connection with both of these nations, and are less likely to live/study or visit either country.

Tolerance attribute score

Point Change From 2014	Score* 2019	Country	World Bank Ranking 2019
-5	20%	United States	1
-10	22%	United Kingdom	5

*Percentage of Respondents who rated “Performs very strongly” based on the following statement: “How do this country rate on: Tolerance?”

Political Freedom attribute score

Point Change From 2014	Score* 2019	Country	World Bank Ranking 2019
-7	33%	United States	1
-6	35%	United Kingdom	5

*Percentage of Respondents who rated “Performs very strongly” based on the following statement: “How do this country rate on: Political Freedom?”

While Brazil, India, and France also boast thriving economies with GDPs within the world's top 10, the forecast shows storm clouds ahead. Brazil's Jair Bolsonaro divided the nation after his recent election, and turmoil continues to embroil the nation which could influence the country's future Index performance. And on the heels of the world's largest election, India's current Prime Minister Narendra Modi secured another five-year term amidst new tensions with their neighbor Pakistan. The Yellow Vest movement and other (sometimes violent) protests headlining the current Macron administration provide a backdrop to Marine Le Pen's recent win in the European elections. Each of these nations must consider how the fraught political landscape might impact impressions and perceptions down the road.



06

The top ten Countrymakers

#1 Countrymaker:

Japan



Japan stands as the #1 country brand in this year's Index, defending its place from 2014 and indicating an ever-solid identity and reputation among would-be tourists, visiting students, residents, consumers, and investors. So, what is behind Japan's continued brand strength? A strong export business of culture.

For Japan, Countrymaking is more than garnering favorable perception, but inspiring action such as tourism. In our study, Tourism ranked high as a dimension, and Like to Visit for Holiday improved since our last report. Japan's rich culture, which encompasses a favorable quality of life, natural beauty, and heritage beckons visitors from around the globe.

In fact, according to the World Tourism Organization, Japan's tourism has enjoyed 6 straight years of double-digit growth, and it shows on social media: of the top 10 countries in this year's Index, Japan has the second-highest number of social media mentions, according to Weber Shandwick's social listening analysis. The diversity of topics discussed on social media reveals what a multifaceted destination Japan is. Whereas in other countries, Natural Beauty is the most mentioned topic, in Japan, Range of Attractions, Food, and Heritage, Art & Culture dominate, with key hash tags such as #mtfuji, #sushi, #soba, and artist #hokusai, among others.

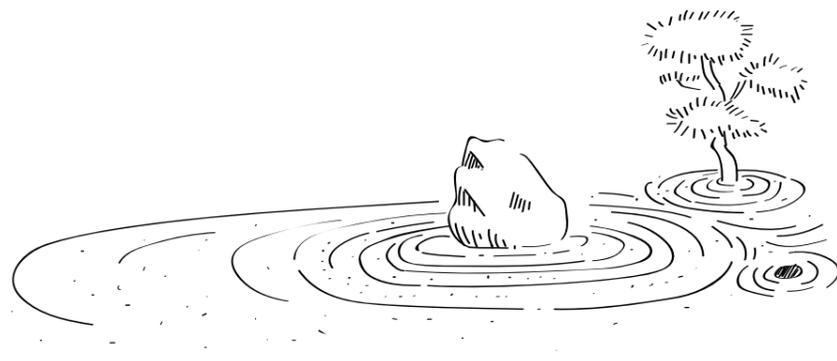
The levers of Countrymaking are also visibly at work in Japan, and perceptions improved across Quality of Life and Environmental Friendliness since our last study. When it comes to Made In, Japan has long enjoyed positive perceptions from their automotive and technology brands like Sony, Nintendo, Toyota, and Nissan. In fact, Japan coasts off these historical strengths, as those brands and others are still top of mind for this year's respondents, who rate Japan's Made In factor highly. In the social media report, we saw a clear affinity for Japan's products, with mentions of high, quality, authentic goods — especially food.

#1 Countrymaker: Japan

But today, Japan's more popular consumer brands seem to be capitalizing on the country's unique heritage and culture, rather than its history of technology innovation. Uniqlo. Muji. Marie Kondo. Nobu Sushi. Five or ten years ago, those names may have been obscure, but today, they represent Japan's greatest export: elements of its culture, including thoughtful design, considered spaces, and conscious cuisine. While the West has bred a culture so consumerist that shoppers face analysis paralysis in the toothpaste aisle, Japanese culture presents a blissful alternative: Simplicity. Clarity. Mental space. Even the trend of Tiny Houses was preceded by a boom in "micro-apartments" in Japan. With our quest for a high-quality life comes the desire to reduce the clutter: we want to live more with less, and Japan shows us how.

But even the strongest of country brands must be aware of their challenges. For Japan, has the shift toward exporting culture come at the expense of other global brand successes?

Has Japan, despite its historic strengths in the electronics and automotive sectors, ceded commercial brand power to the likes of China's Huawei and South Korea's Hyundai and Samsung? In the last 10 years, the number of Japanese companies in PwC's top 100 by market cap dropped from six to one, with brands like Nintendo falling out. In the 2018 FutureBrand Index, Japan is only represented by Toyota, which, while strong at #19, is down 12 places since the previous Index.



Japan still garners strong impression for technology and innovation. Perhaps the country's engineering prowess has not disappeared, but instead has shifted inward to focus on local endeavors such as infrastructure and healthcare rather than building global powerhouse brands. For example, the LFA-X could soon become the fastest bullet train in the world, rivaling airplane-level speeds. And world-renowned Japanese robotics technology is being used to enrich medical equipment, such as the nursing robot. But these innovations have yet to take the shape of globally recognized brands. Yes, Japan has succeeded in popularizing consumer brands like Uniqlo and Muji that trade on Japanese culture, aesthetic, and design. As long as their culture remains globally popular, these brands will flourish. But as consumer tastes inevitably shift to the next new fancy, Japanese culture as an export may wane too.

But Japan has some firepower in its arsenal: the 2019 Rugby World Cup and the 2020 Summer Olympics around the corner in Tokyo.

These two events must help Japan continue to exceed on its measures of Experience, including Heritage & Culture, Made In, and Tourism. These global events give Japan the opportunity to deepen positive perceptions and motivate people from all over to emulate its culture, enjoy its products, and visit frequently. But if it hopes to continue its streak of measurable, competitive brand strength, Japan will be wise to remember that dimensions of Purpose provide the bedrock for a strong country brand. By continuing to invest in its Quality of Life, Value System, and the Business Potential of its impressive homegrown technology innovation, Japan can ensure it continues to capture the hearts and minds of a global audience for many years to come.



Japan

01
2019 FCI
Ranking

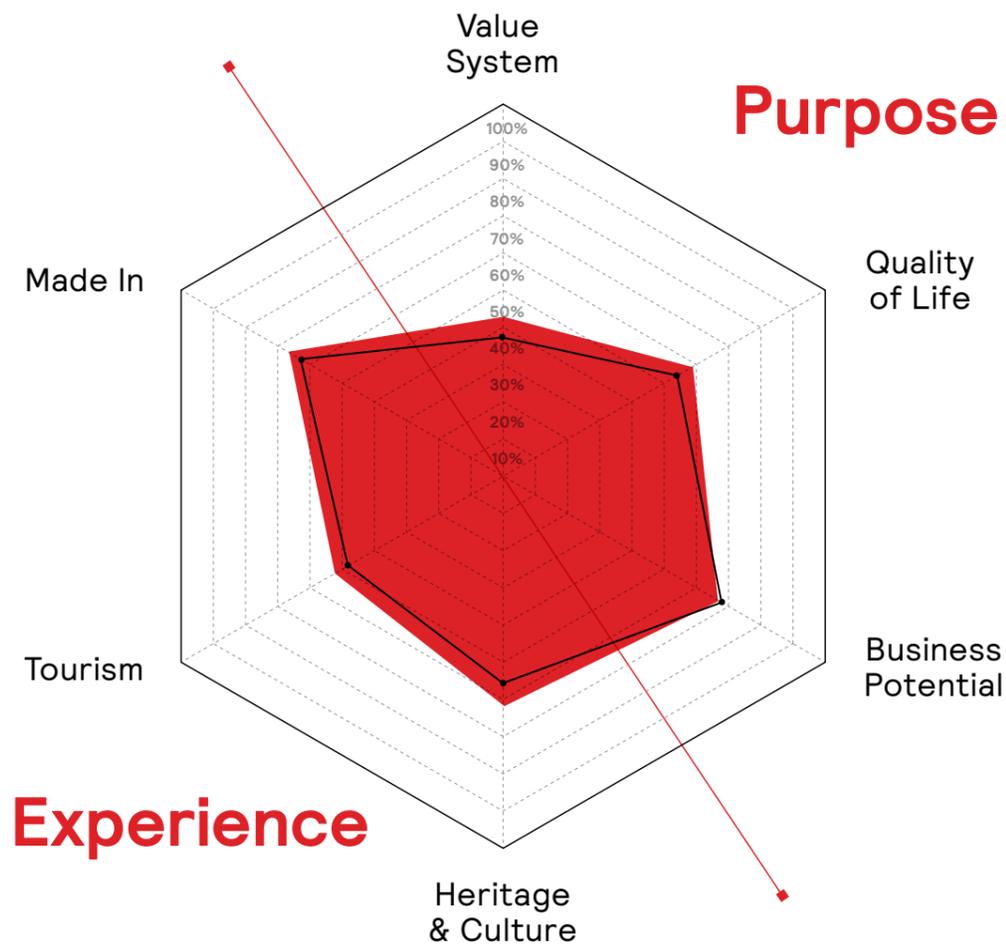
01
2014 FCI
Ranking

03
World Bank
Ranking

Summary of Perceptions

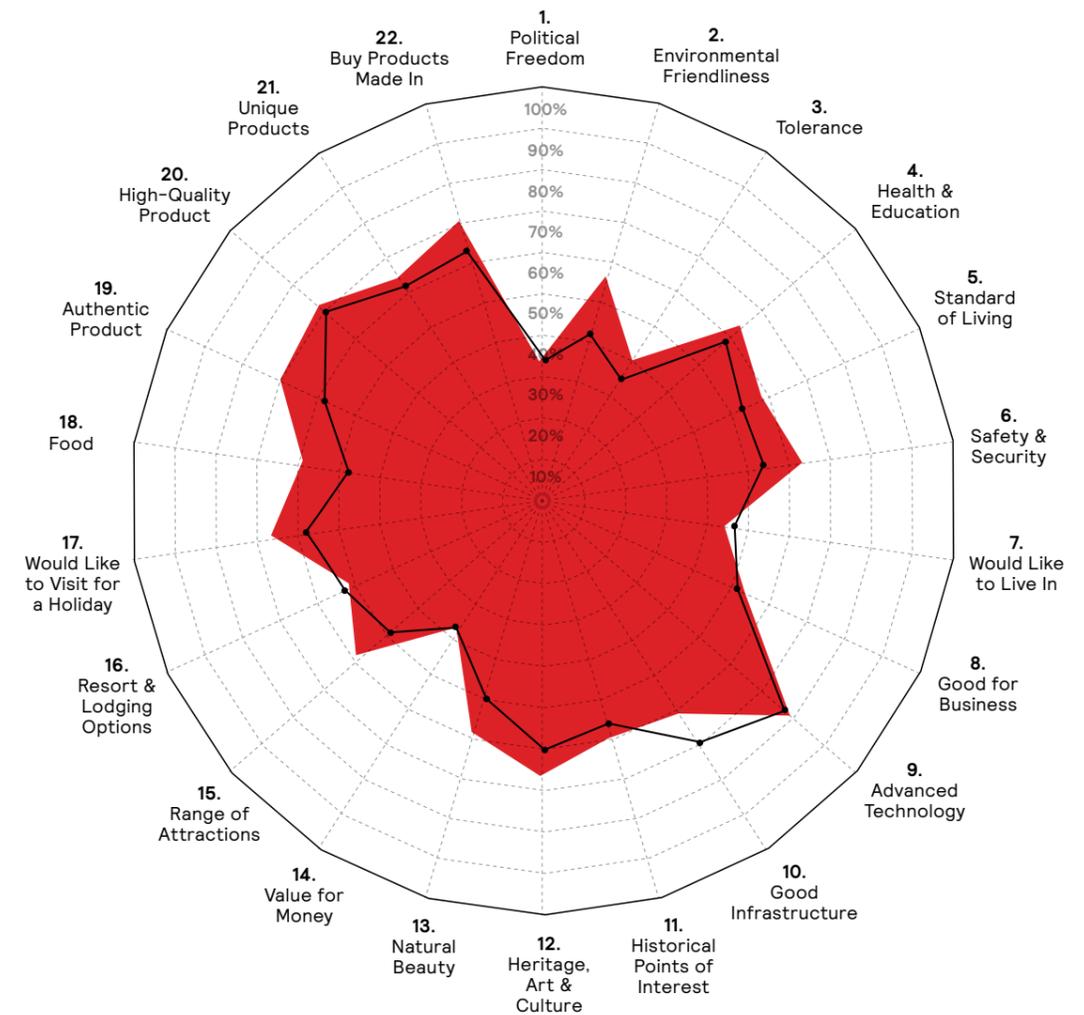
How does Japan perform by dimension?

2019 ■ 2014 □



What are the key associations with Japan?

2019 ■ 2014 □



Top-of-Mind Associations



Products & brands associated with Japan



Value System

1. Political Freedom
2. Environmental Friendliness
3. Tolerance

Heritage & Culture

11. Historical Points of Interest
12. Heritage, Art & Culture
13. Natural Beauty

Quality of Life

4. Health & Education
5. Standard of Living
6. Safety & Security
7. Would Like to Live In

Tourism

14. Value for Money
15. Range of Attractions
16. Resort & Lodging Options
17. Would Like to Visit for a Holiday
18. Food

Business Potential

8. Good for Business
9. Advanced Technology
10. Good Infrastructure

Made In

19. Authentic Product
20. High-Quality Product
21. Unique Products
22. Buy Products Made In



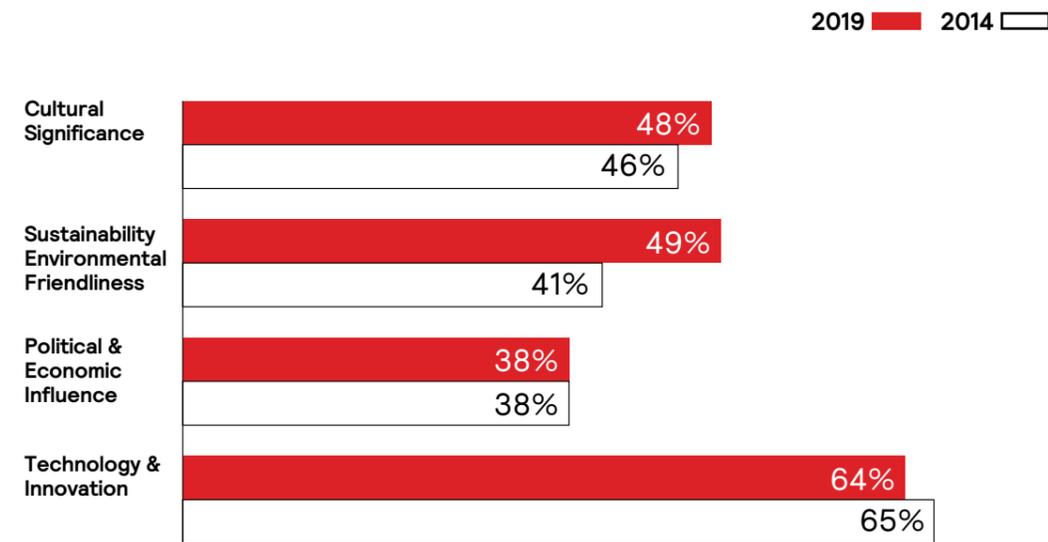
Japan

01
2019 FCI
Ranking

01
2014 FCI
Ranking

03
World Bank
Ranking

Current momentum 2019 vs 2014



Mentions in global social media conversations*

Technology

“2020 #Tokyo Games to use #hydrogen fuel to light cauldrons, torch during relay – Japan’s advanced technology with hydrogen to be showcased including #FCEV.”

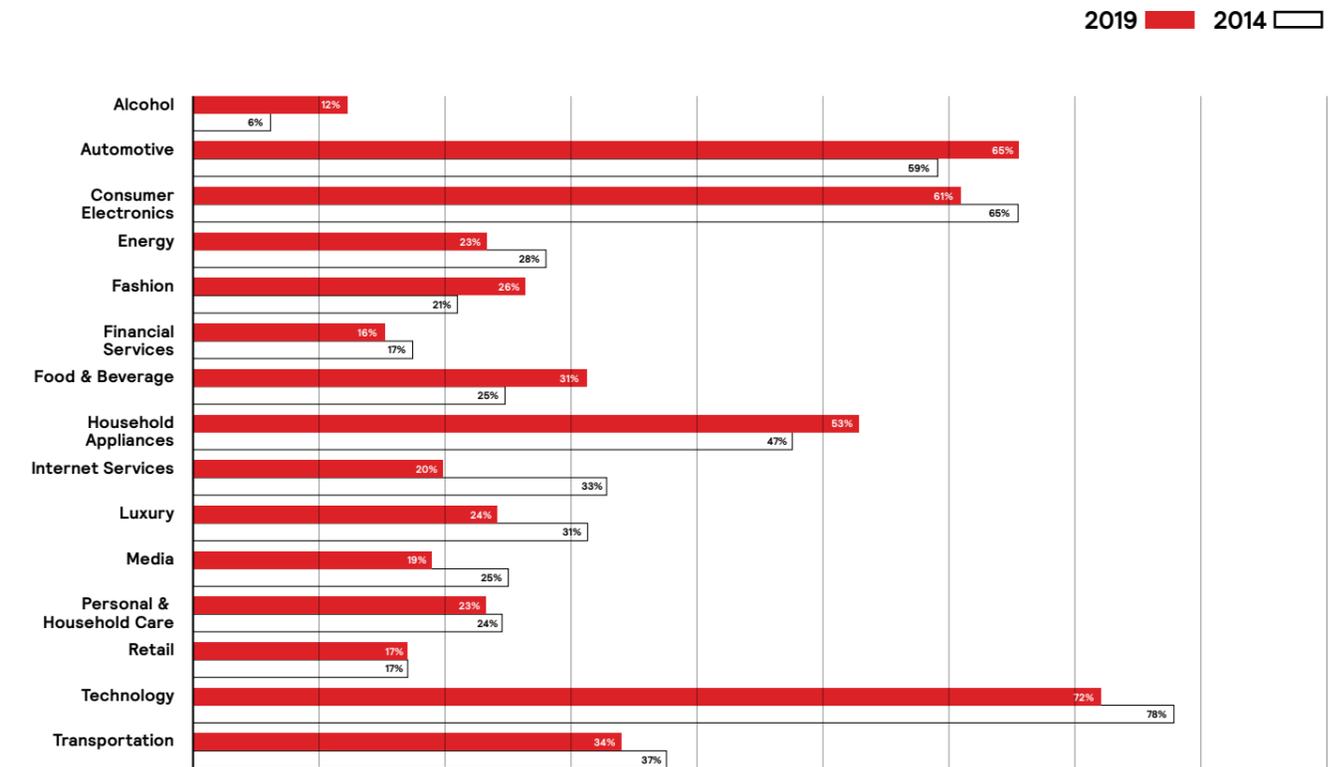
Cultural Significance

“Japan has an incredible culture and history, really on par with much of the West. They’ve also done a better job of preserving it than us. We could learn a lot from them.”

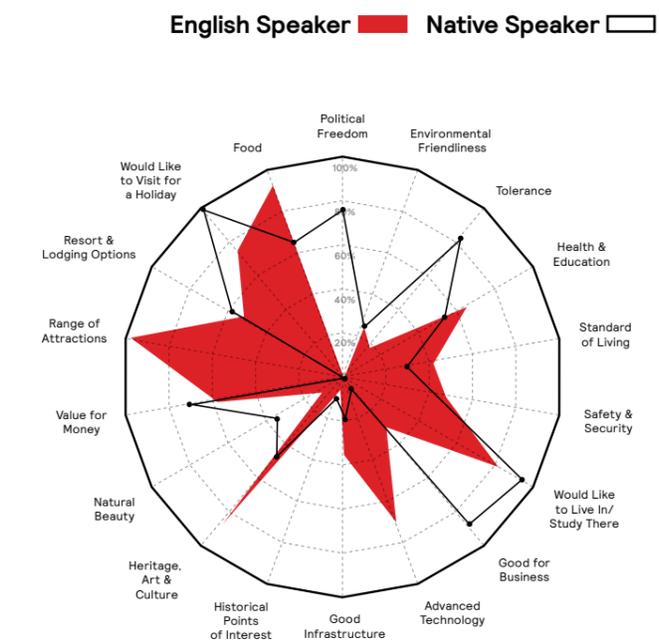
Business Potential

“Countries like Japan and China are making huge investments in policy management in telecom market. Other factors such as increasing smartphone penetration in the region and rising network complexities are boosting the market in the region.”

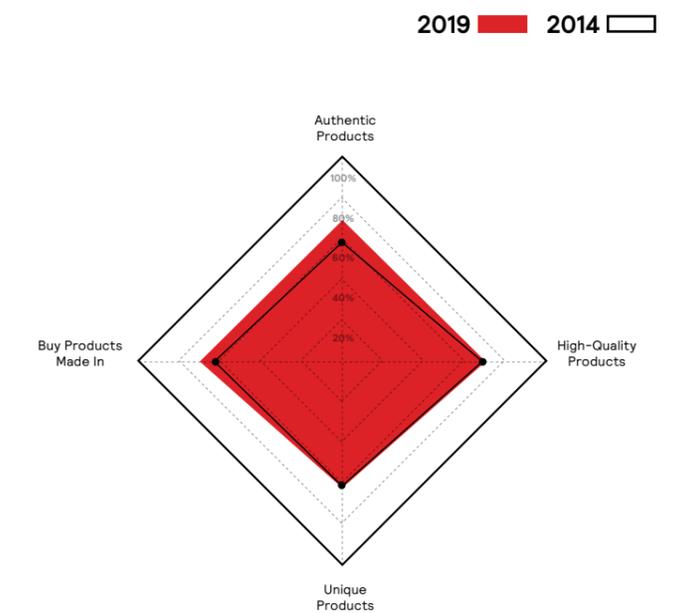
What is Japan most expert at?



In which areas does Japan stand out in social media conversations?*



Made In product perceptions and purchase intent





Japan

01
2019 FCI
Ranking

01
2014 FCI
Ranking

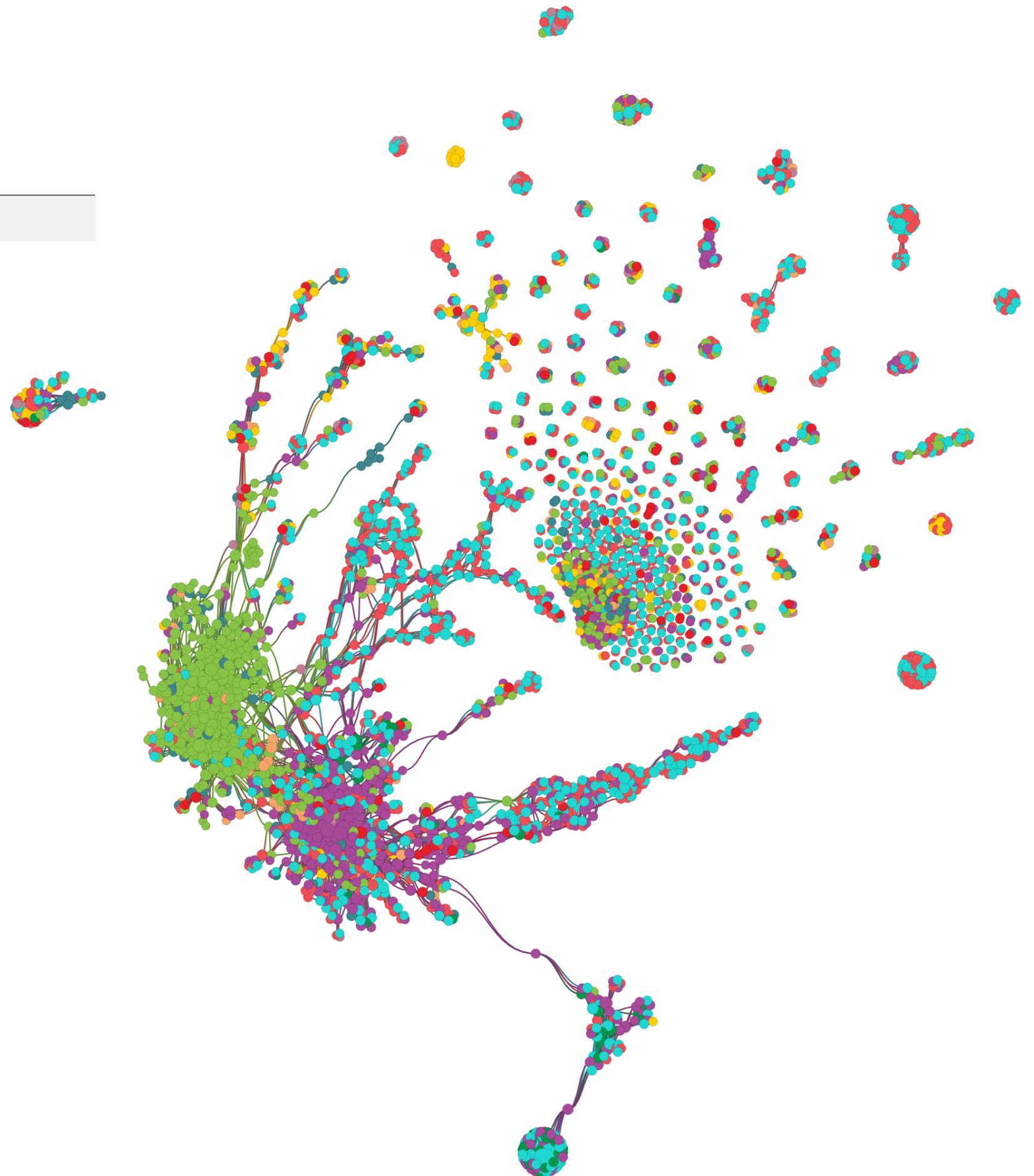
03
World Bank
Ranking

Social conversations clustered by topic*

Findings

- When people talk about Japan online, they're predominately talking about its Range of Attractions and its Food
- Range of Attractions has the strongest levels of topic connectivity in social conversations around Japan – it's often mentioned in connection with other topics such as Heritage, Art & Culture, and, above all other topics, Natural Beauty
- The level of connectivity that Range of Attractions has with other topics is evidence of Japan's appeal as a multifaceted destination
- Although Japanese food is a separate driver of social conversations and has less connectivity with other topics, it is noteworthy that it the most concentrated topic around Japan

- 1 Range of Attractions
- 2 Heritage, Art & Culture
- 3 Food
- 4 Natural Beauty
- 5 Advanced Technology
- 6 Make Products That Are Authentic
- 7 Make Products of High Quality
- 8 Resort & Lodging Options
- 9 They Create Unique Products
- 10 Historical Points of Interest



#2 Countrymaker:

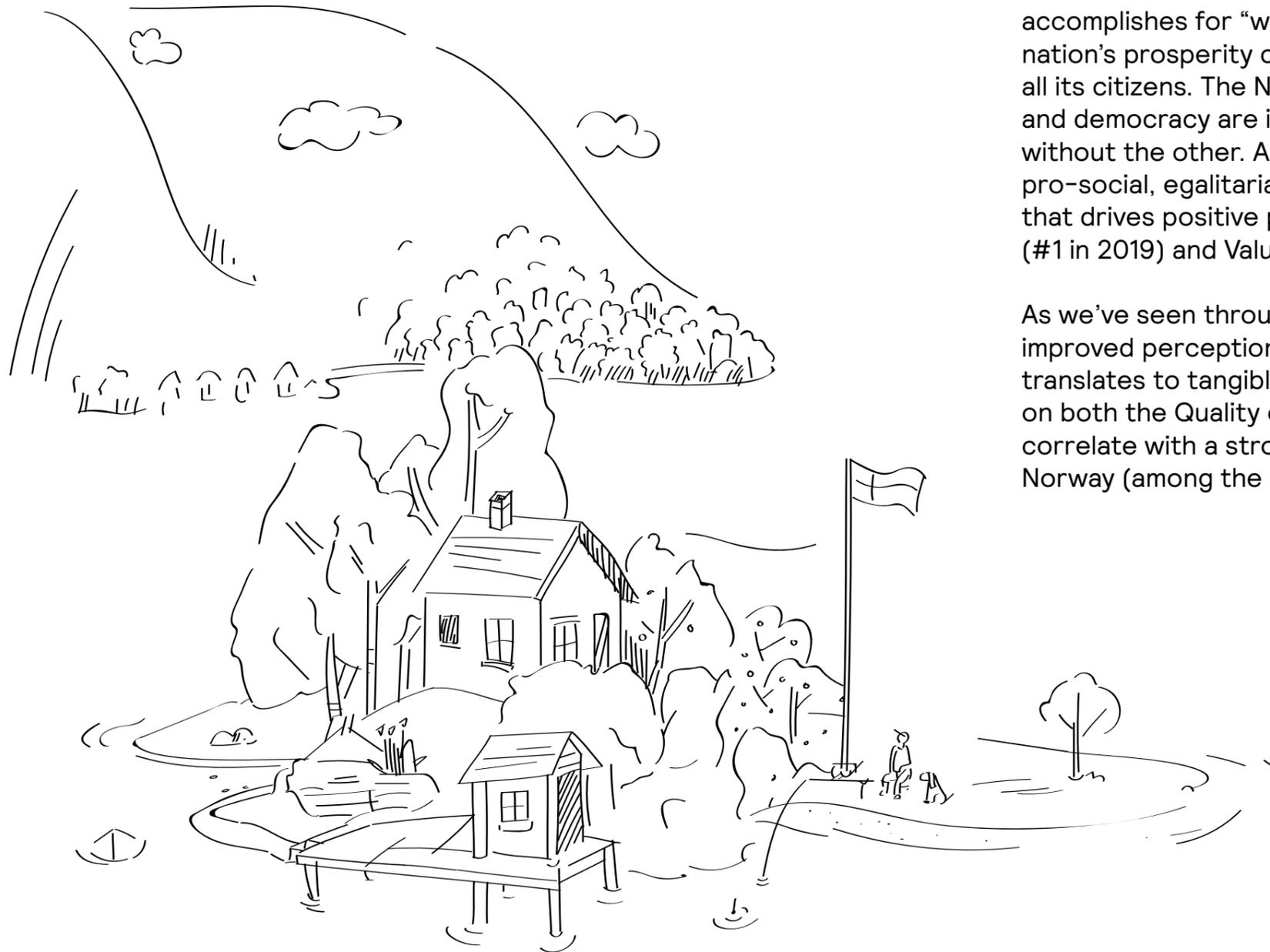
Norway

Already leading the pack in 2014, Norway has climbed another four spots to reach #2 in the 2019 FCI.

So, what's the secret to Norway's brand strength? Beyond its rugged and stark natural beauty, petroleum exports, and commercial salmon fishing, Norway is probably best known globally for the success of its model of social democracy – which explains why its standing in this year's Index is predicated on strength of perception regarding its Value Systems and Quality of Life.

American Senator Bernie Sanders famously extols the success of the Nordic's social democracy model and what it accomplishes for "working people" – making the point that a nation's prosperity can and should be distributed amongst all its citizens. The Nordic model demonstrates that equality and democracy are interdependent – you can't have one without the other. At a time of increased polarization, Norway's pro-social, egalitarian models of governance are a beacon that drives positive perception around Norway's Quality of Life (#1 in 2019) and Value Systems (#2) in our 2019 ranking.

As we've seen through our previous country brand studies, improved perception is not only "nice" in and of itself – it translates to tangible outcomes. Norway's standing as a leader on both the Quality of Life and Value System dimensions correlate with a strong Intention to Visit and Do Business in Norway (among the highest in the Index).



#2 Countrymaker: Norway

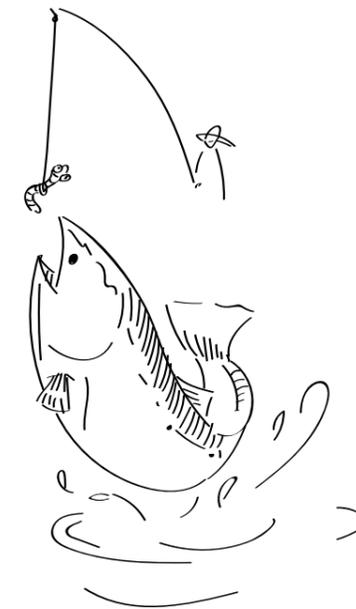
Yet people don't tend to visit Norway to tour its democratic institutions...at least not without appreciating the astonishing natural beauty of this country. In addition to egalitarianism and moderation, a collective desire for "nearness to nature" is a trait that author Inge Eidsvåg claims is integral to Norway's cultural DNA.

Admirers and visitors alike share their affinity for Norway's natural beauty on social media. According to Weber Shandwick's social listening report, Natural Beauty was the most dominant topic of conversation, highly driven by winter holidays and visits to see the Northern Lights – but often intertwining with conversations around Heritage, Art & Culture.

Environmental Friendliness (which also has a strong correlation with tourism and business) is not so much a habit in Norway as it is a virtue, and one that its citizens discuss openly: Weber Shandwick's social listening analysis demonstrates that local conversations surround environmental standards, driven by the impact of global warming and its effect on glaciers and the local fishing scene. Consider this: crude oil and natural gas are core export commodities for Norway, representing 22% of its GDP and 67% of its exports. Yet despite this fact, around 98% of Norway's domestic power usage is hydroelectric. The fact that Norway is such an advocate for sustainable practices yet ranks behind only Saudi Arabia in oil exports, creates a paradox that understandably drives public debate.

Wrestling with the inconsistency between values and practice isn't just limited to public debate though – famed outdoor clothing brand Helly Hansen recently committed to offering PFC-free products as a step toward removing that element from its clothing altogether. This is noteworthy, considering that in an industry that includes "eco-friendly" brands like Patagonia and The North Face, many producers are still using PFCs for waterproofing.

Environmental Friendliness provides another benefit when it comes to brand perception – this year we've seen a statistical correlation between perceptions of Environmental Friendliness and Advanced Technology. Norway significantly improved perceptions of its technological capabilities since 2014 – good news for Oslo who's working to position itself as the world's next "tech hub". With a 76% increase in private investments of tech start-ups from 2017 to 2018, Norway is poised to absorb technological incubation and advancement into its already strong brand reputation.





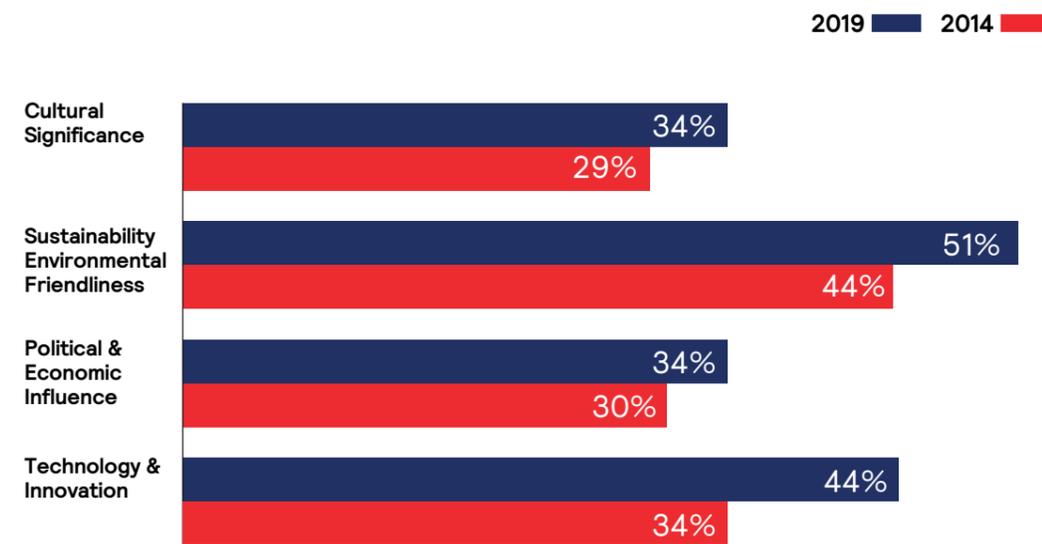
Norway

02
2019 FCI
Ranking

06
2014 FCI
Ranking

28
World Bank
Ranking

Current momentum 2019 vs 2014



Mentions in global social media conversations*

Would Like to Visit

“Want to find great architecture, food and nature? @carbonocampus to find the best 3 destinations to put on your bucket list.”

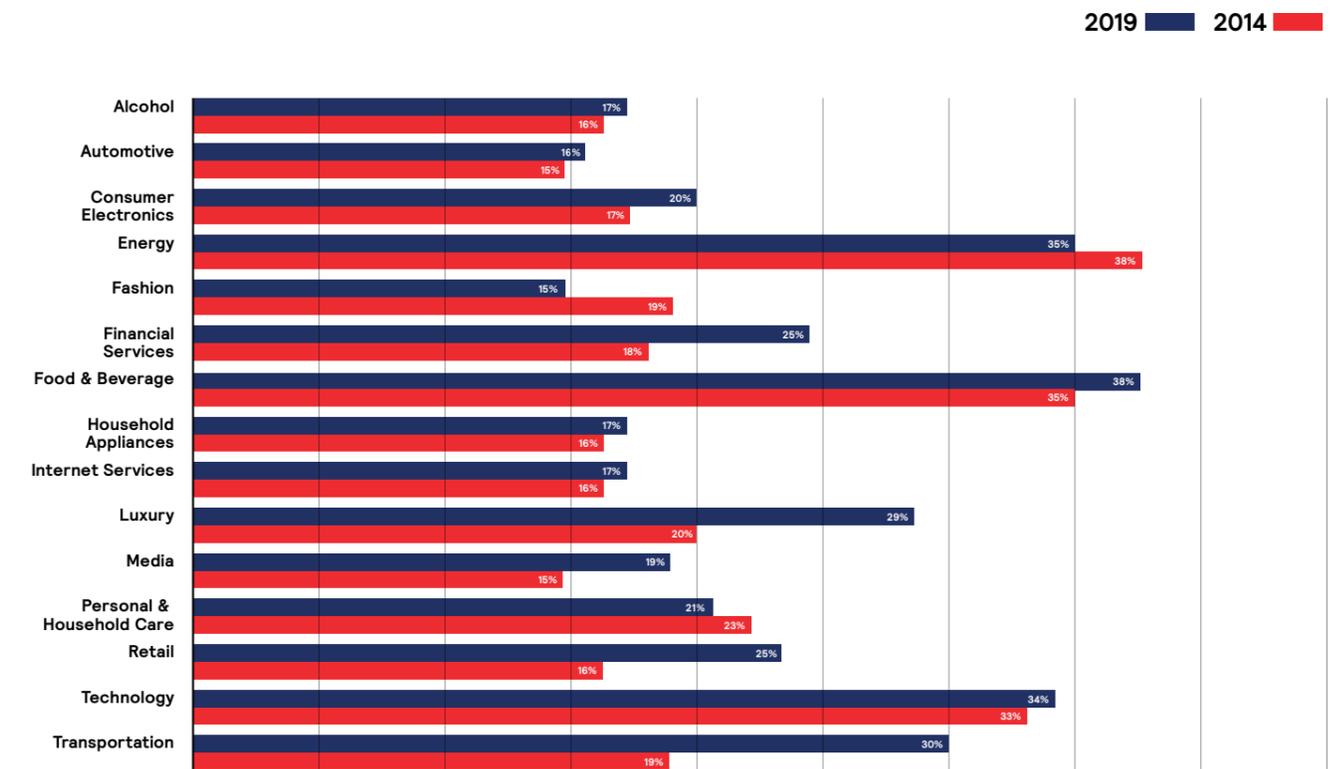
Natural Beauty

“Going on a family vacation to #Norway? Little ones will love dressing up and learning about Vikings while adults will appreciate this stunning scenery on this day trip to #Karmøy. @VisitNorway #familytravel #gowithnugget”

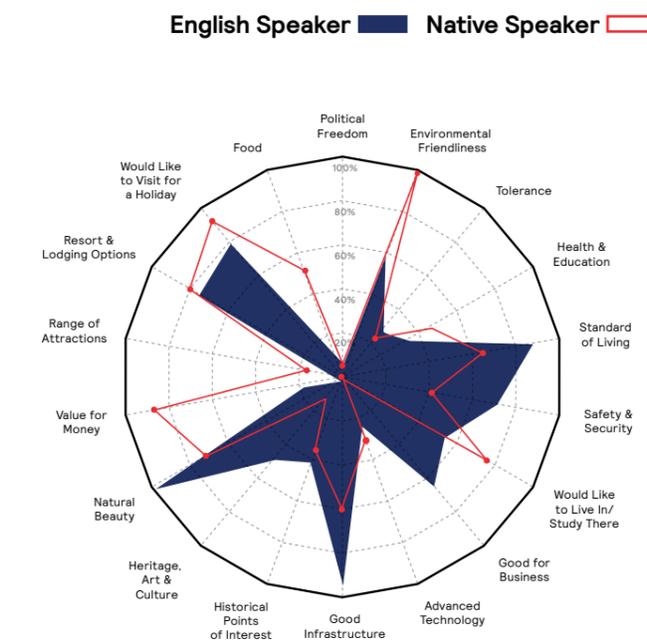
Environmental Standards

“I find it interesting that Norway has embraced electric cars and renewable energy despite having an economy that relies so heavily on petroleum export.”

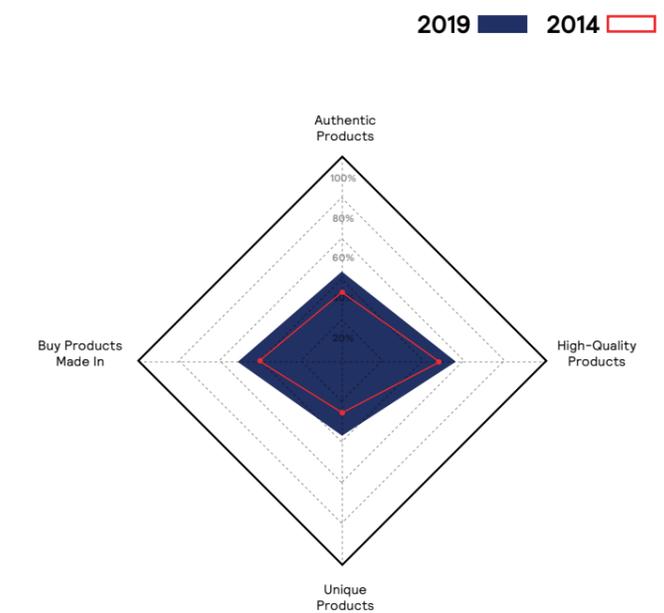
What is Norway most expert at?



In which areas does Norway stand out in social media conversations?*



Made In product perceptions and purchase intent





Norway

02
2019 FCI
Ranking

06
2014 FCI
Ranking

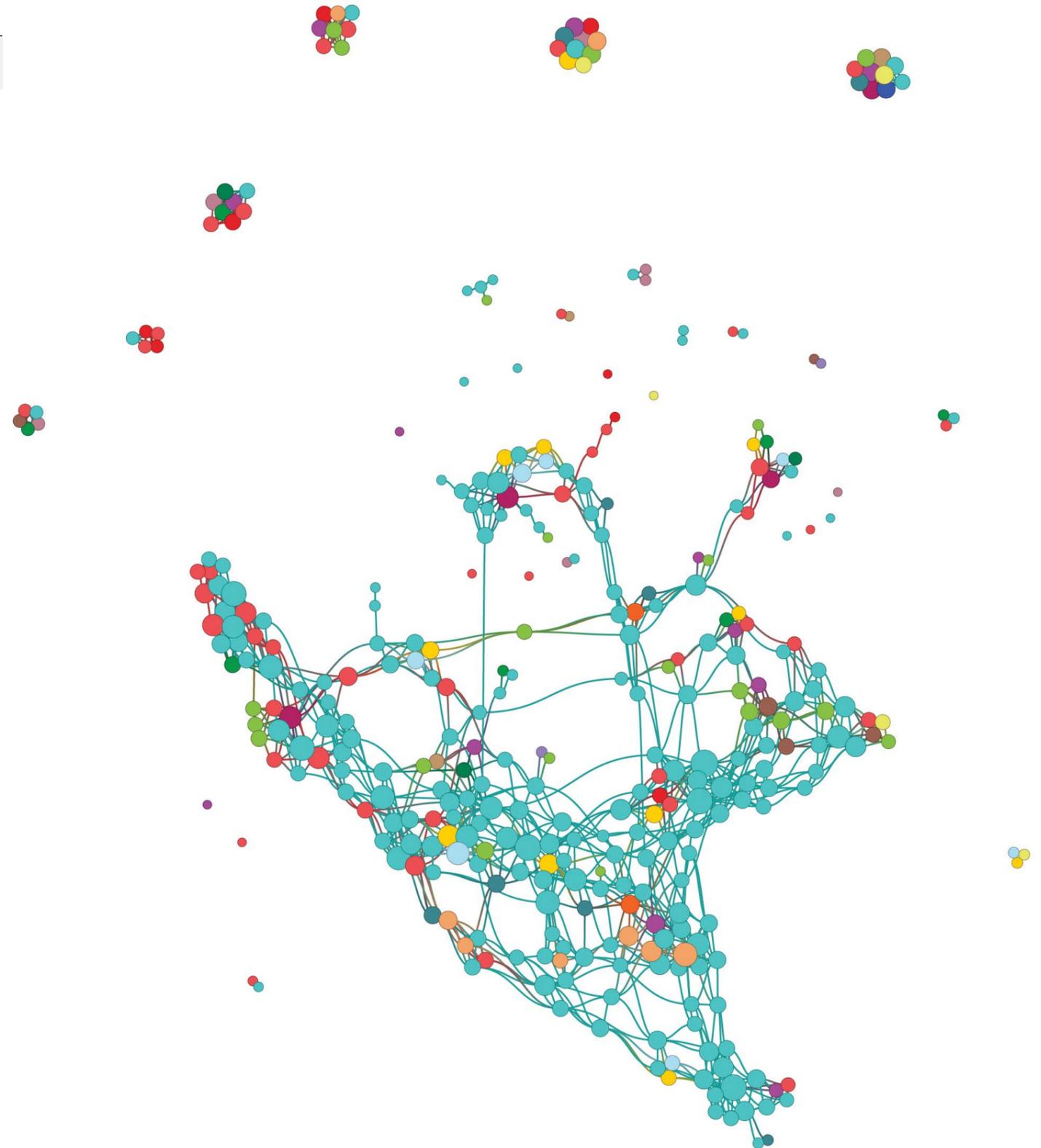
28
World Bank
Ranking

Social conversations clustered by topic*

Findings

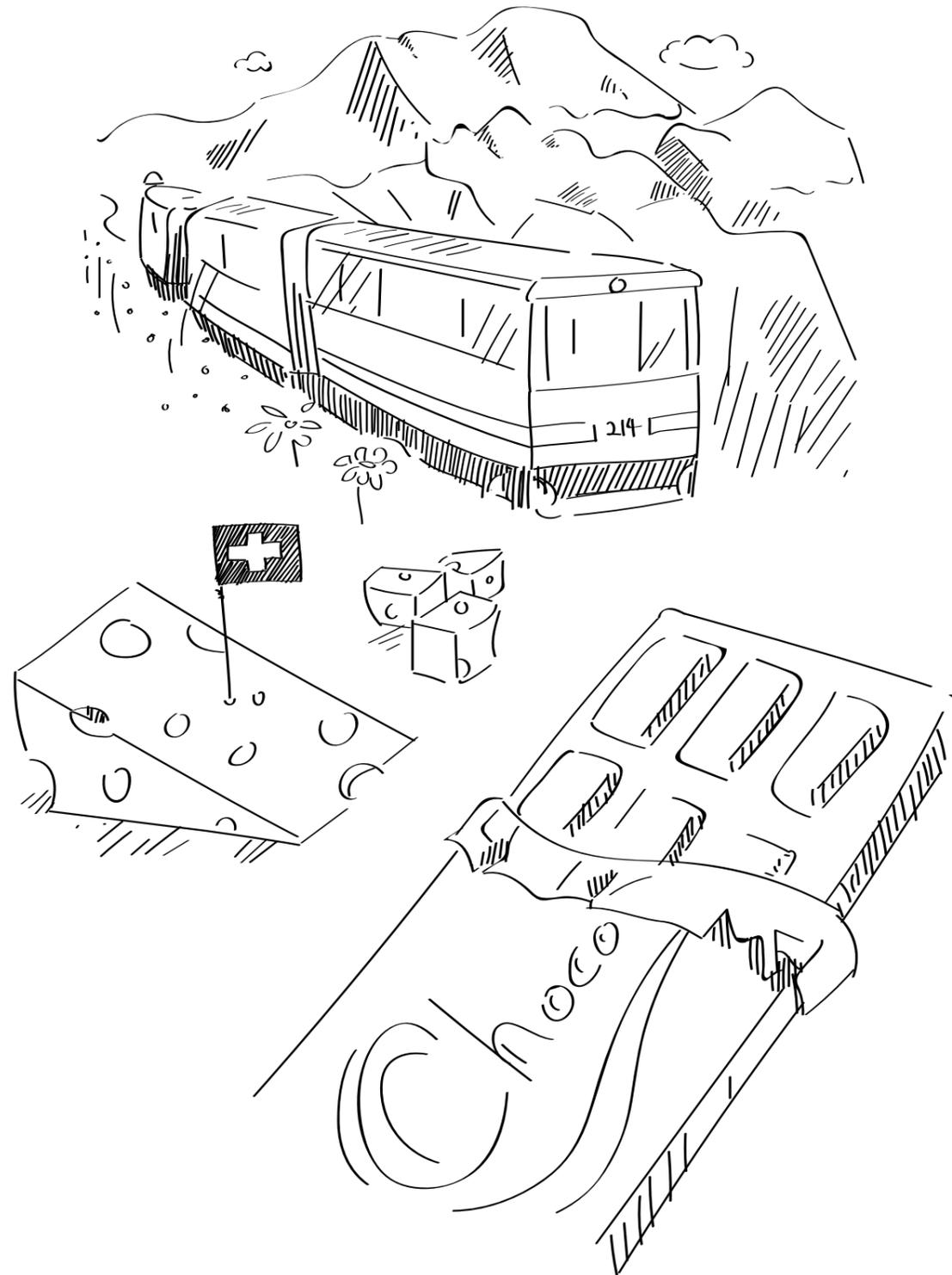
- Though social conversations around Norway are far more disperse than Japan or Switzerland, mentions of Natural Beauty is the most prominent topic
- The distribution of conversations within Natural Beauty indicates a broad variety of themes, as opposed to several recurring themes, related to Norway's natural landscapes
- Food is the third-largest topic, and mentions of Norway's farming activities and initiatives to reduce the country's environmental impact stand out in these conversations

- 1 Natural Beauty
- 2 Heritage, Art & Culture
- 3 Food
- 4 Advanced Technology
- 5 Historical Points of Interest
- 6 Good Infrastructure
- 7 Resort & Lodging Options
- 8 They Create Unique Products
- 9 Make Products of High Quality
- 10 Make Products That Are Authentic



#3 Countrymaker:

Switzerland



Known as much for its chocolate, cheese, and scenic beauty as it is for its staunch neutrality and having a per capita GDP among the highest in the world, Switzerland (#3) is a proud nation with a world-class brand.

No small feat for a country nestled between prominent global powers such as France, Germany, and Italy surrounding its borders. The fact that Switzerland never takes sides has had a distinct impact on both the Purpose and Experiential aspects of their country's brand.

It's easy to forget that several hundred years ago, Switzerland's military was one of the most feared in Europe. Since the early 20th century and the country's adoption of its pro-humanitarian neutrality stance, one could argue that the Swiss Army is associated more closely with Victorinox and its iconic pocket knife than any combat operation.

Being unfettered from international conflict no doubt contributed to this small, land-locked nation's prosperity – of the top 20 countries in this year's country ranking, Switzerland has the second-highest rating for Confidence in Stability & Reputation. And it's easy to see why with the country's economic and political stability, transparent legal system, and exceptional infrastructure. A global audience has taken note – Switzerland was discussed as a country of great political and economic influence according to Weber Shandwick's social listening data.

This confidence is further underscored by Switzerland earning the highest rating on Safety & Security in the Index this year – highlighting its reputation as one of the world's most effective arbiters. This is evidenced by the many renowned NGOs, such as the Red Cross, the UN Office at Geneva, IOC, and the World Economic Forum that call Switzerland home.

#3 Countrymaker: Switzerland

Switzerland's country brand also ranks among the top five nations across all brand Experience dimensions (Tourism, Heritage & Culture, and products and services Made In) this year.

Ranking third in our Made In dimension is particularly noteworthy. In Weber's social listening report, Switzerland is the only country that saw Making Products of High Quality among the top five topics, both globally and locally. Switzerland's economy has long been associated with a highly developed services sector led by finance, high-tech and specialized manufacturing. Our survey respondents perceive Switzerland's expertise in Luxury goods more than Financial Services and Technology in 2019.

And destinations such as Singapore are challenging Switzerland as the premier destination for private banking as the fastest growing client groups are emerging in China and other market economies.

Moving forward, Swiss luxury goods brands (dominated by watchmakers) will want to pay attention to millennials who are becoming more important to this industry, as their global spending power will soon be greater than any other generation. Recalibrating brand engagement to match their needs and desires is slowly being adopted by luxury brands.

Millennials prioritize uniqueness over craftsmanship, a fact that luxury Swiss brands such as Richemont, Swatch, and Rolex should consider, particularly with the rise of smart products such as the Apple Watch. Luxury buyers today are looking for bespoke bracelets that work with these new products yet still exude the same unique luxury qualities traditional bands or bracelets by Swiss mainstays are known and celebrated for.

Traditional Swiss luxury brands should also rest assured that, "Swiss made" still carries positive brand equity with millennials as this year's ranking sees Swiss brands score among the top 15% for "Creates Unique Products" among our survey participants.

This year's study solidifies Switzerland as a leading destination for tourism, government, and for business.

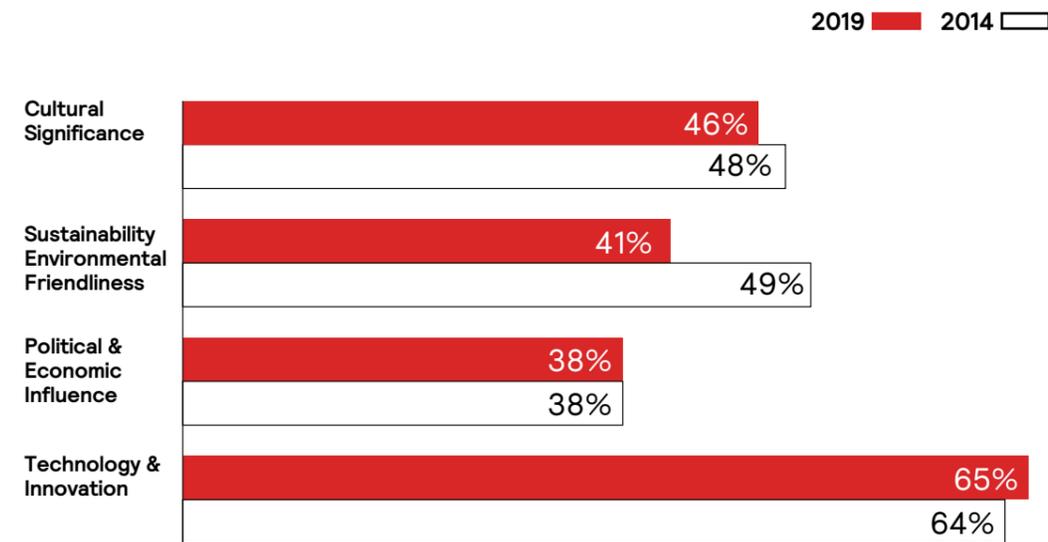




Switzerland

03 | 02 | 20
 2019 FCI Ranking | 2014 FCI Ranking | World Bank Ranking

Current momentum 2019 vs 2014



Mentions in global social media conversations*

Natural Beauty

“Sunrise in COL DU COU 1921m Swiss Mountain #Switzerland beautiful pace and view.”

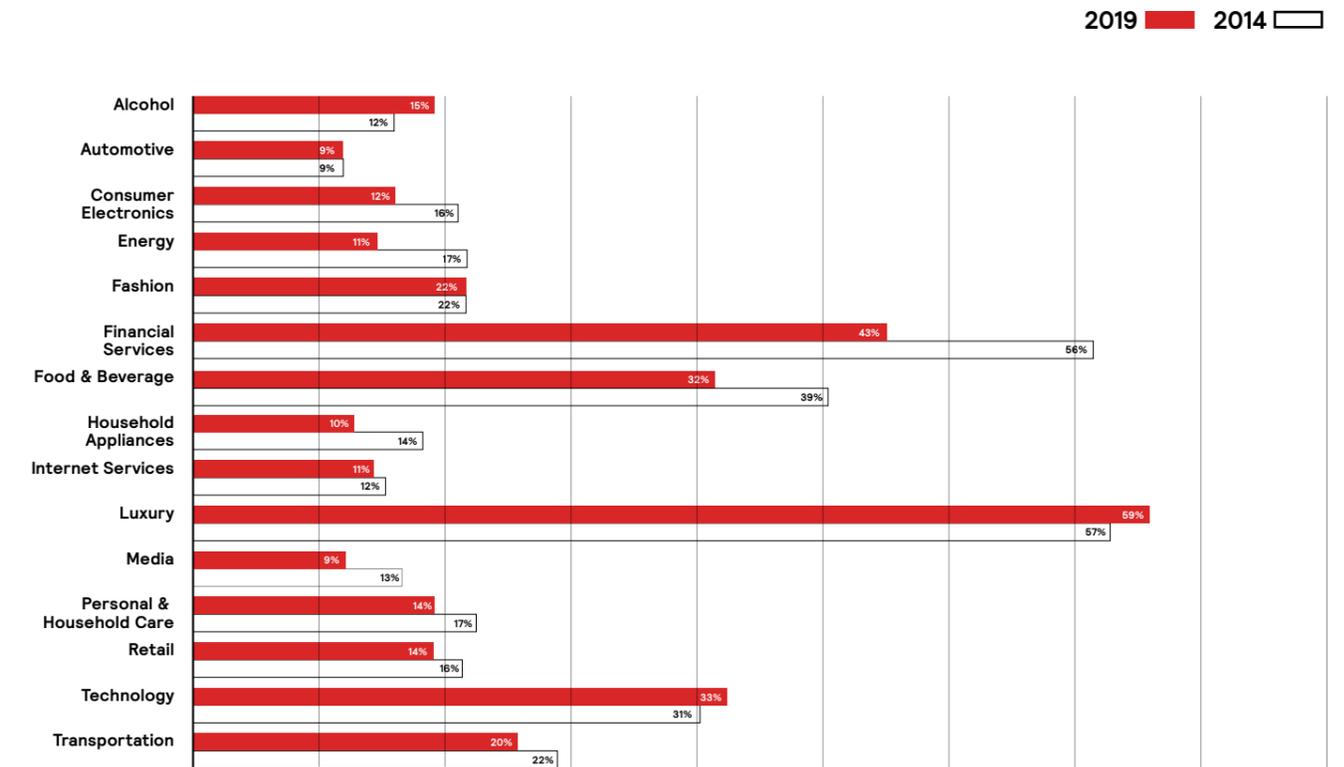
Luxury

“With world-class hotels, restaurants, and bars, as well as luxury shopping and tones of off-piste activities, St. Moritz is as good as it gets.”

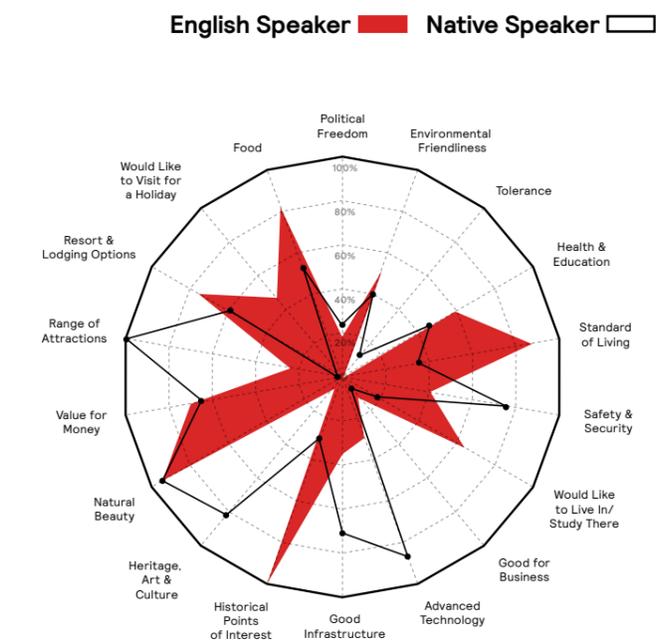
Standard of Living

“The country as a whole is noted for its high salaries, great standard of living, low unemployment rates, and some of the most beautiful scenery you will ever lay eyes on.”

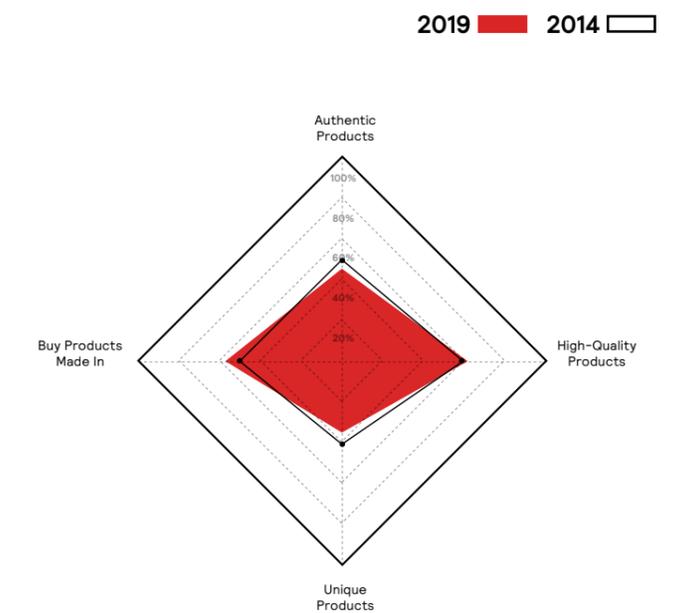
What is Switzerland most expert at?



In which areas does Switzerland stand out in social media conversations?*



Made In product perceptions and purchase intent





Switzerland

03

2019 FCI Ranking

02

2014 FCI Ranking

20

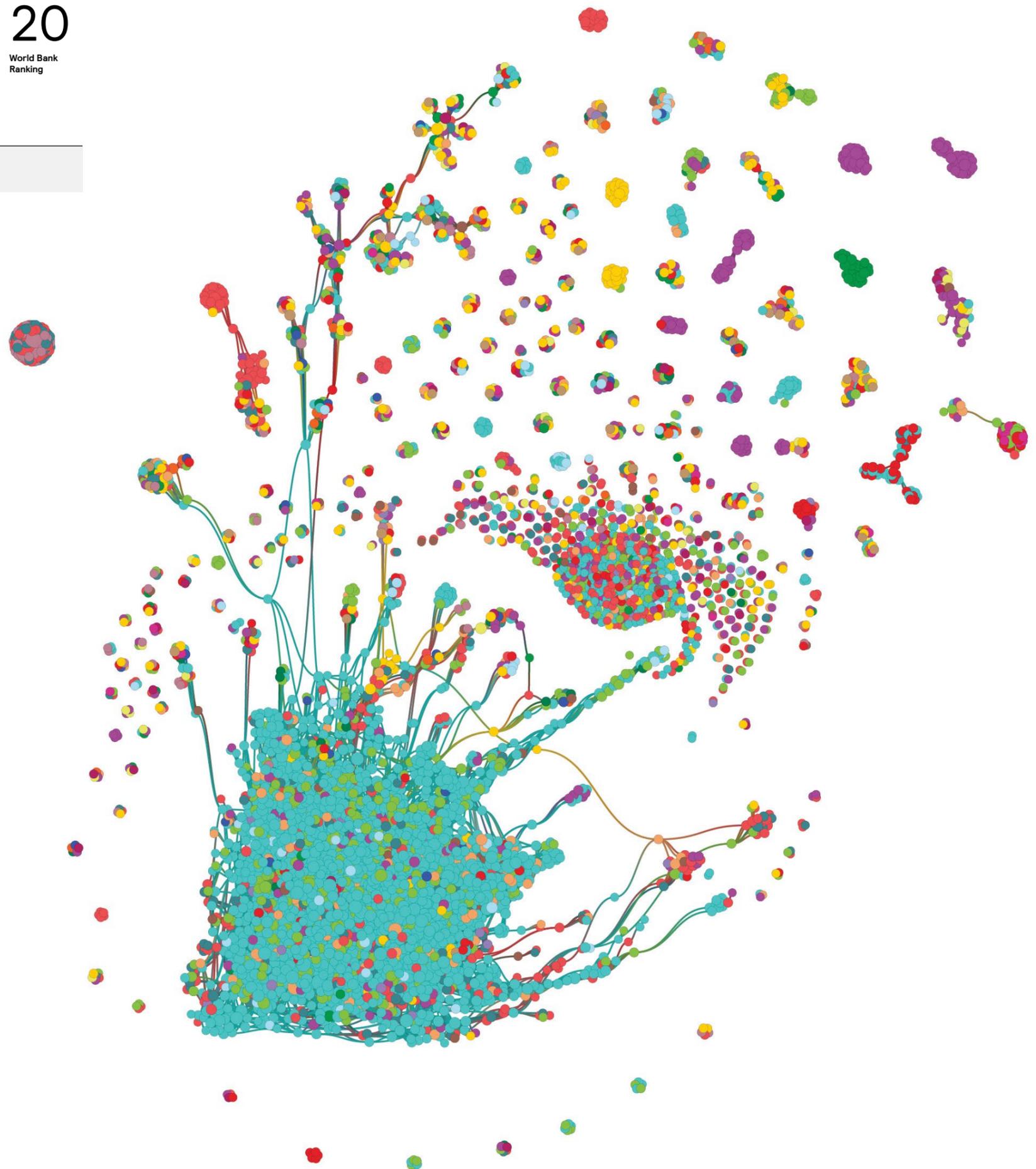
World Bank Ranking

Social conversations clustered by topic*

Findings

- Natural Beauty dominates social conversations around Switzerland and links heavily to Range of Attractions and Heritage, Art & Culture
- Conversations around Natural Beauty are clustered tightly together, indicating shared content around trips to Switzerland (such as visiting the Alps and skiing destinations)
- In addition to tourism-related themes, Make Products of High Quality is also prominent in social conversation and is the fourth most-mentioned topic around Switzerland

- 1 Natural Beauty
- 2 Heritage, Art & Culture
- 3 Range of Attractions
- 4 Make Products of High Quality
- 5 Advanced Technology
- 6 Resort & Lodging Options
- 7 Make Products That Are Authentic
- 8 Health & Education
- 9 Value for Money
- 10 Good Infrastructure



#4 to #10 Countrymakers:

Best of the rest

They may not have reached the coveted top three, but in the very worthy spots of four to ten are respectively:

Sweden, Finland, Germany, Denmark, Canada, Austria, and Luxembourg.

That last one may be the most surprising for a multitude of reasons, not the least Luxembourg's size – it is one of the smallest sovereign states in Europe. However, Luxembourg City's status as one of the three official capitals of the European Union and the fact that it's home to the European Court of Justice means that it punches above its weight class. A truly multi-cultural country thanks to its political standing and geographical location, Luxembourg serves as a prominent financial center.

#4 to #10 Countrymakers: Best of the rest

A new entrant in this year's Index at #10, this land-locked nation was beaten into ninth place by Austria, up one spot from 2014. It may not be sexy, but Austria scored highest for Good Infrastructure, a testament to its respected transport network of roads, railways, and waterways that serve as shipping hubs. The Danube, Europe's second-longest river, is also an integral part of this robust network.

Just above Austria is Canada, down three places. Although its much-loved Prime Minister Justin Trudeau has taken a beating lately in the press, Canada retained its high marks for Political Freedom, Standard of Living and Natural Beauty. For anyone who has seen the Canadian Rockies, visited Banff, or enjoyed the multicultural sights of Vancouver which lie at the intersection of a celebrated city, beach, and mountain range, it's easy to see why Canada is firmly lodged in the top ten.

In sixth place is Germany, down three. It's hard to imagine that immigration didn't play a part in this, given the problems that Chancellor Angela Merkel's government juggled with fiscal austerity and its open-door immigration policy. Along with a large number of other countries, increasing populism and nationalism dominate the political agenda.

Then we get to Denmark, Finland and Sweden. Lagging slightly behind Norway which secured second position, the Scandinavian countries dominate the top of our Index. Apart from Sweden which maintained its ranking, all have jumped up in the rankings since 2014. In our last report, our survey respondents had stronger-than-average perceptions of these countries across key dimensions. Our 2019 report indicates the Scandinavian countries continue to successfully deliver and build upon these existing equities.

While it's debatable whether the rise of so-called 'Scandi-noir' has raised the profile of the culture and landscape of Scandinavia (think *The Killing*, *The Bridge*, *Borgen*, etc.), what is not in question is the marketability of their commitment to the environment and their inherent natural beauty. From brilliant blue fjords and the majestic Northern Lights to endless days and perpetual nights, Scandinavia has a plethora of unique selling points. If they further capitalize on them, we could see these nations rising even further up our Index over the next five years.



Sweden

04
2019 FCI
Ranking

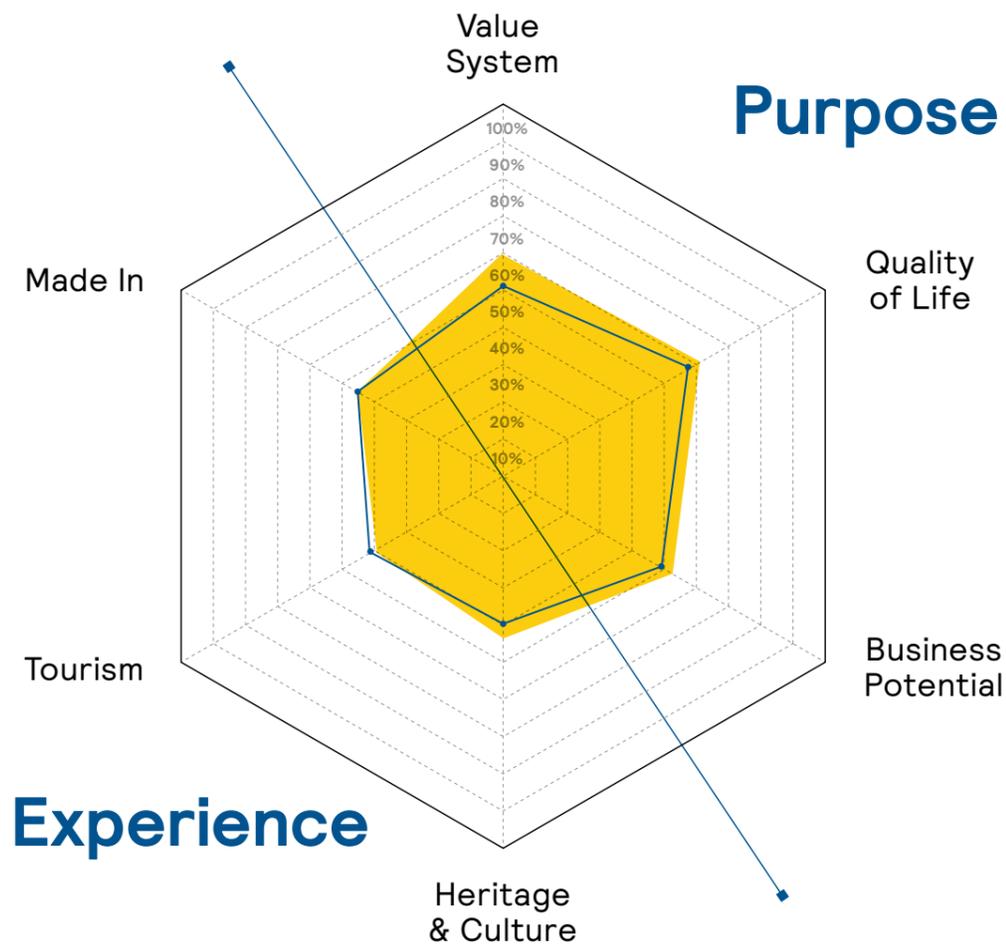
04
2014 FCI
Ranking

22
World Bank
Ranking

Summary of Perceptions

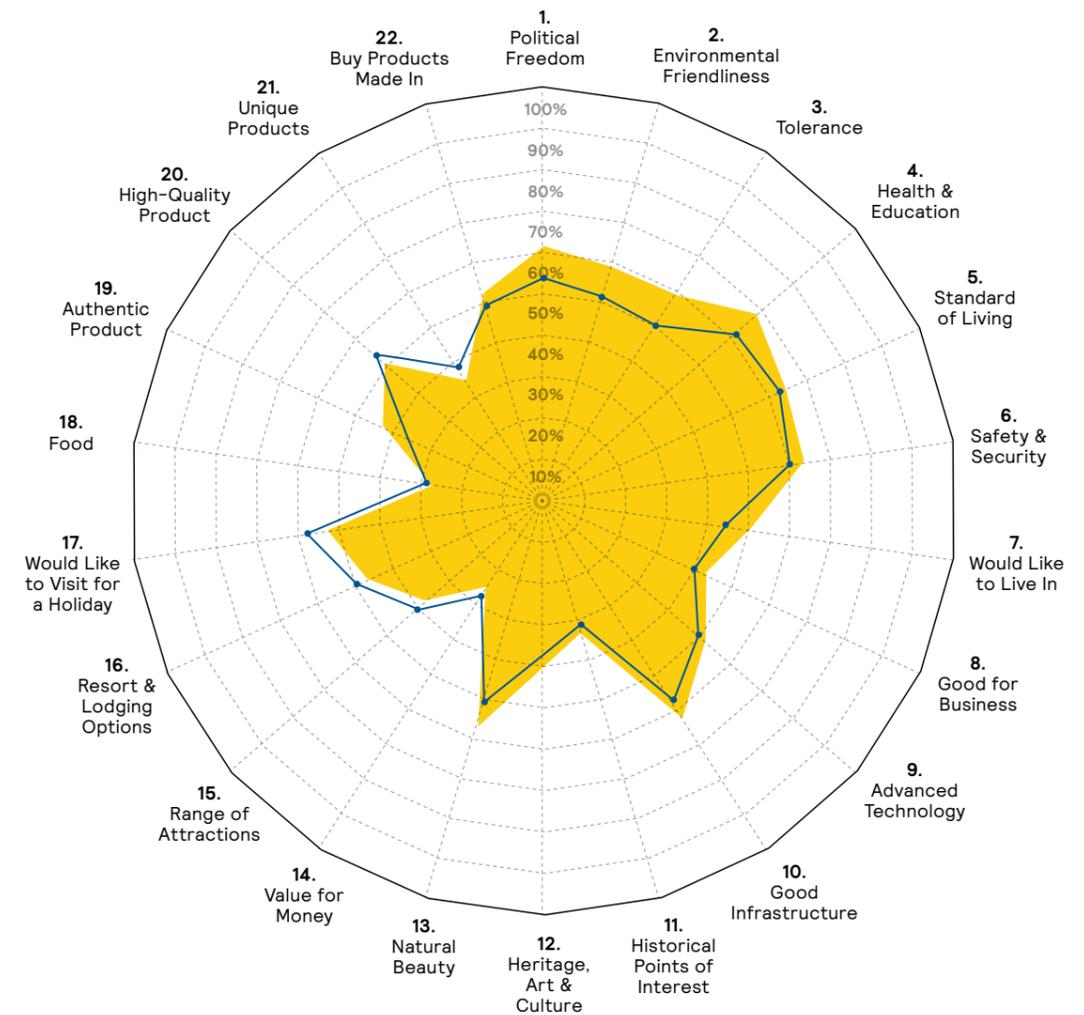
How does Sweden perform by dimension?

2019 ■ 2014 ■

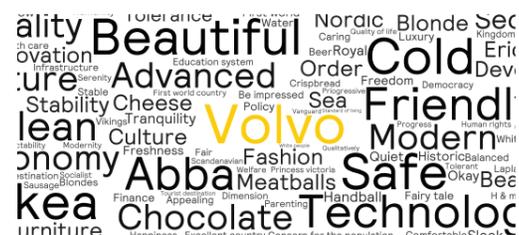


What are the key associations with Sweden?

2019 ■ 2014 ■



Top-of-Mind Associations



Products & brands associated with Sweden



Value System

1. Political Freedom
2. Environmental Friendliness
3. Tolerance

Heritage & Culture

11. Historical Points of Interest
12. Heritage, Art & Culture
13. Natural Beauty

Quality of Life

4. Health & Education
5. Standard of Living
6. Safety & Security
7. Would Like to Live In

Tourism

14. Value for Money
15. Range of Attractions
16. Resort & Lodging Options
17. Would Like to Visit for a Holiday
18. Food

Business Potential

8. Good for Business
9. Advanced Technology
10. Good Infrastructure

Made In

19. Authentic Product
20. High-Quality Product
21. Unique Products
22. Buy Products Made In



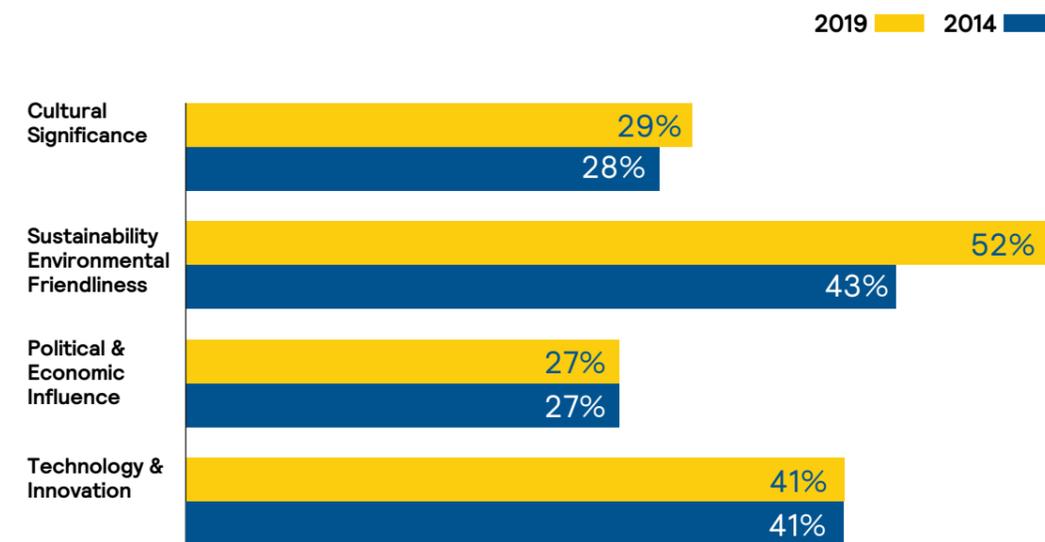
Sweden

04
2019 FCI
Ranking

04
2014 FCI
Ranking

22
World Bank
Ranking

Current momentum 2019 vs 2014



Mentions in global social media conversations*

Natural Beauty

“These kind of vacations are so inspiring! I love big majestic mountains, but I also like exploring all the tiny plants that grow in the mountains. I took photos of all kind of animals we encountered and I even managed to do a drawing while traveling.”

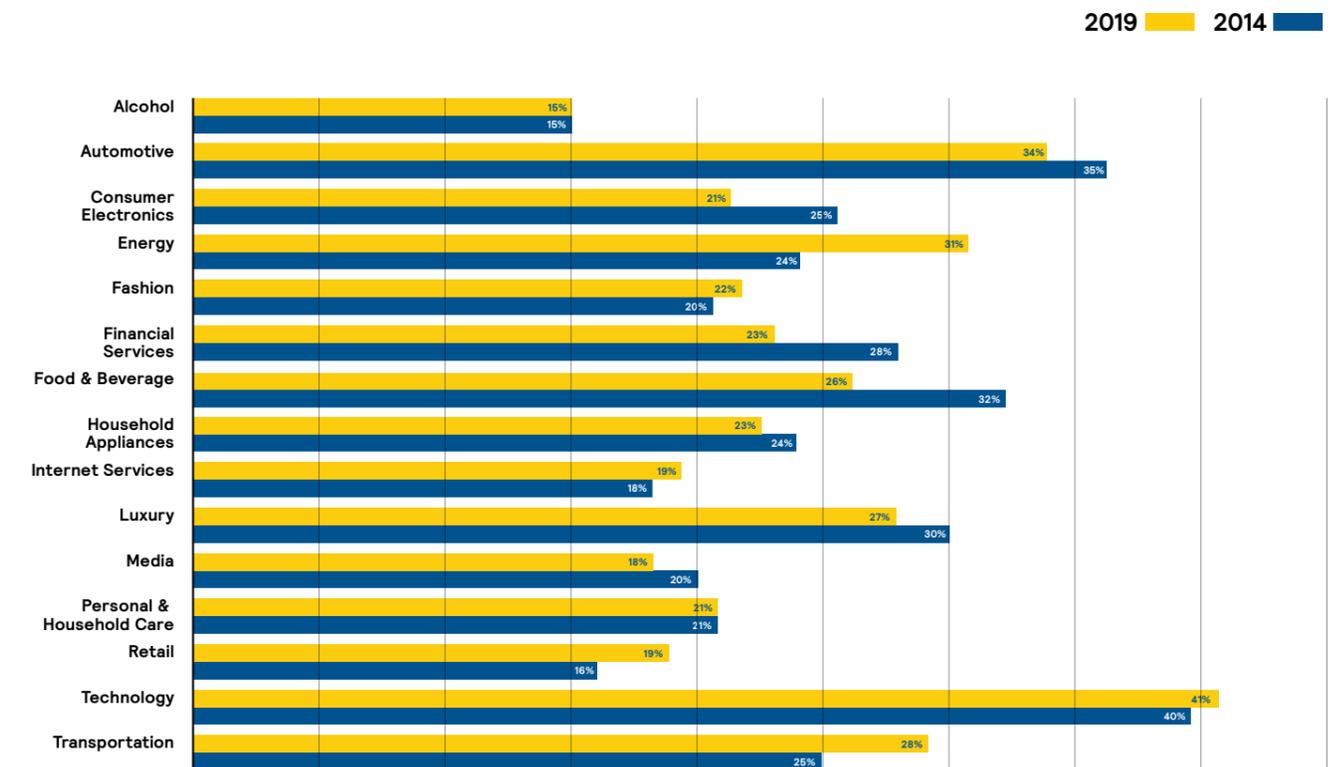
Art & Culture

“I’m not always an easy sell on modern art, but I really enjoyed the modern art museum in Stockholm. If you want something that requires a bit more effort and feels more exclusive, the Boros Collection in Berlin is kinda cool. It’s a WW2 bunker converted into an art gallery that you can only visit on 12-person tours that book up months in advance...”

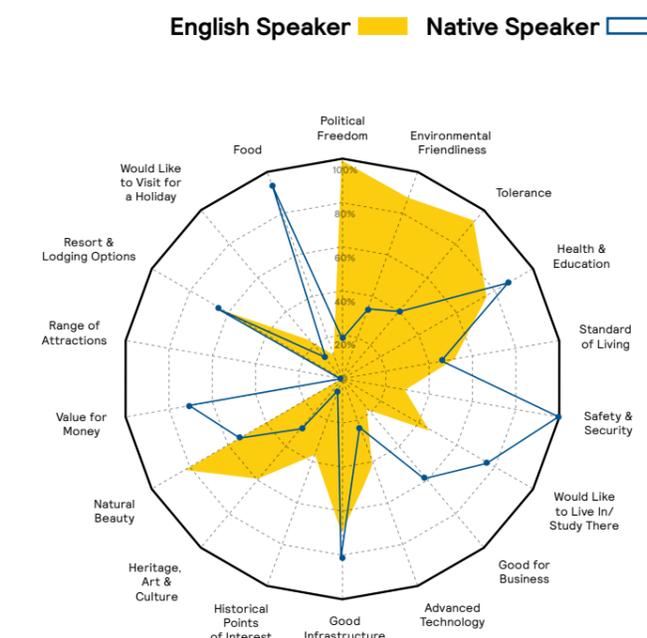
Transportation

“Stunning Underground Art in Stockholm’s Metro Station.”

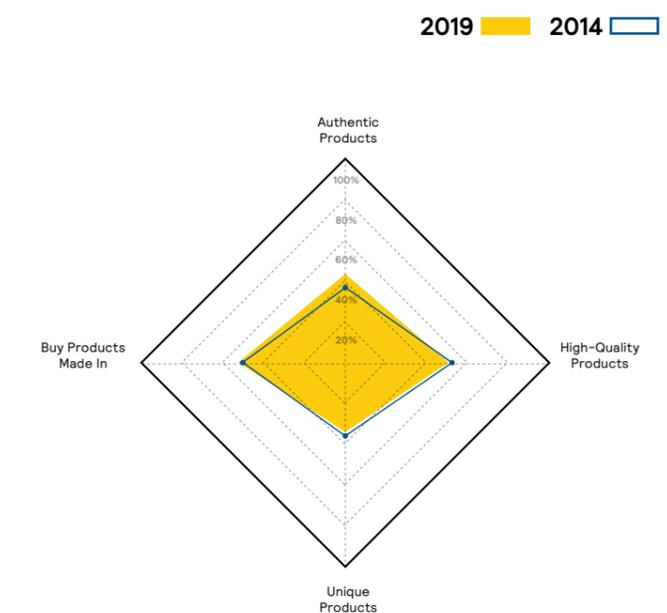
What is Sweden most expert at?



In which areas does Sweden stand out in social media conversations?*



Made In product perceptions and purchase intent





Finland

05
2019 FCI
Ranking

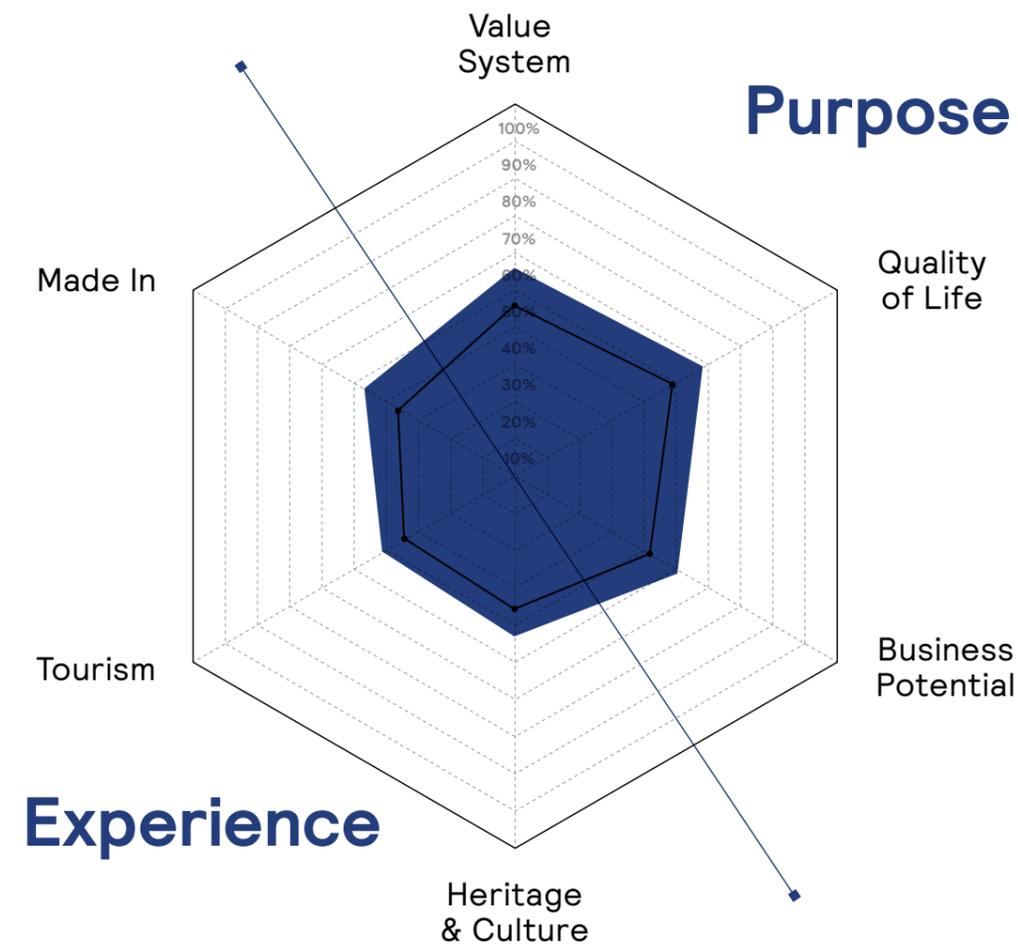
13
2014 FCI
Ranking

42
World Bank
Ranking

Summary of Perceptions

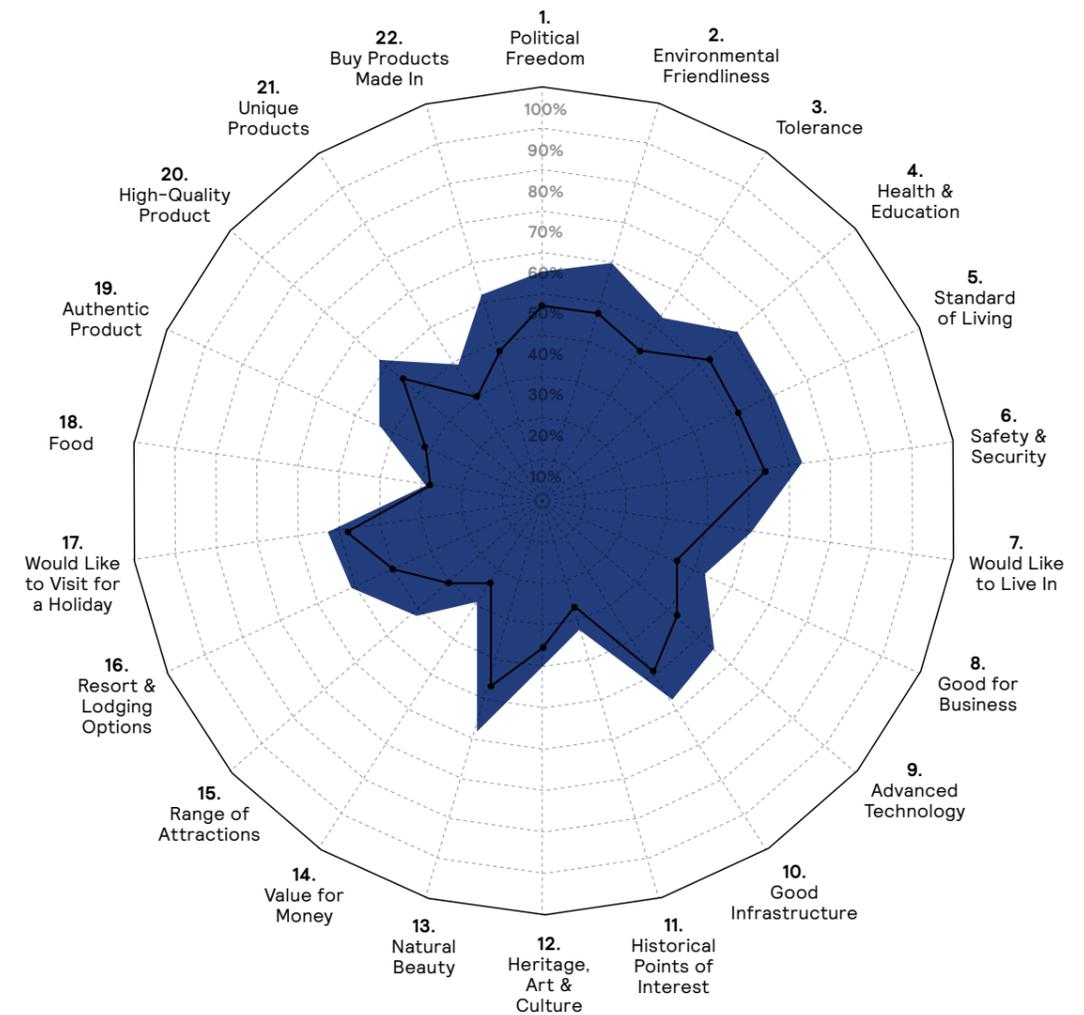
How does Finland perform by dimension?

2019 ■ 2014 □



What are the key associations with Finland?

2019 ■ 2014 □



Top-of-Mind Associations



Products & brands associated with Finland



Value System

1. Political Freedom
2. Environmental Friendliness
3. Tolerance

Heritage & Culture

11. Historical Points of Interest
12. Heritage, Art & Culture
13. Natural Beauty

Quality of Life

4. Health & Education
5. Standard of Living
6. Safety & Security
7. Would Like to Live In

Tourism

14. Value for Money
15. Range of Attractions
16. Resort & Lodging Options
17. Would Like to Visit for a Holiday
18. Food

Business Potential

8. Good for Business
9. Advanced Technology
10. Good Infrastructure

Made In

19. Authentic Product
20. High-Quality Product
21. Unique Products
22. Buy Products Made In



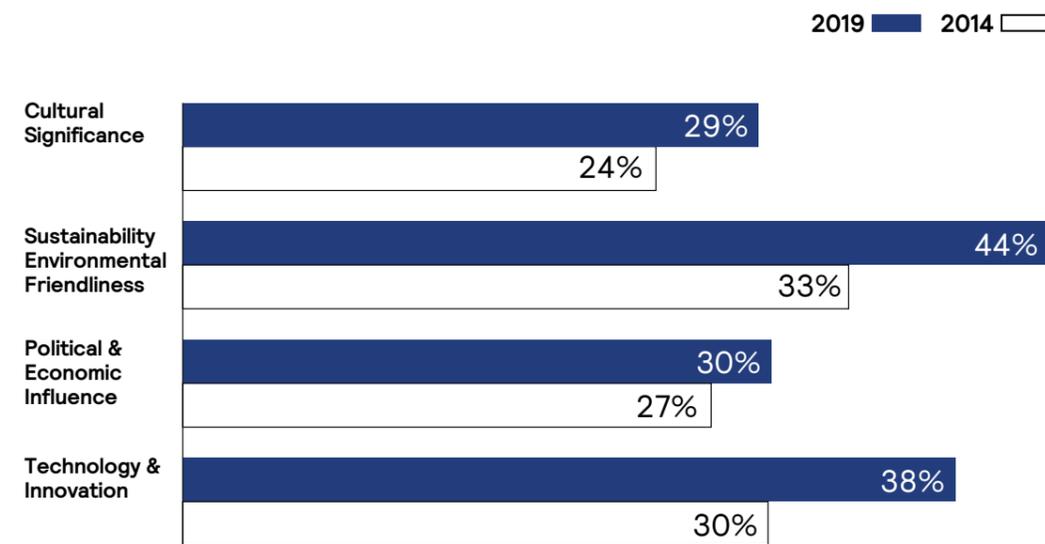
Finland

05
2019 FCI
Ranking

13
2014 FCI
Ranking

42
World Bank
Ranking

Current momentum 2019 vs 2014



Mentions in global social media conversations*

Environmental Standards

“The country is so eco-friendly, and nowhere in Europe has more trees and its’ capital couldn’t be greener.”

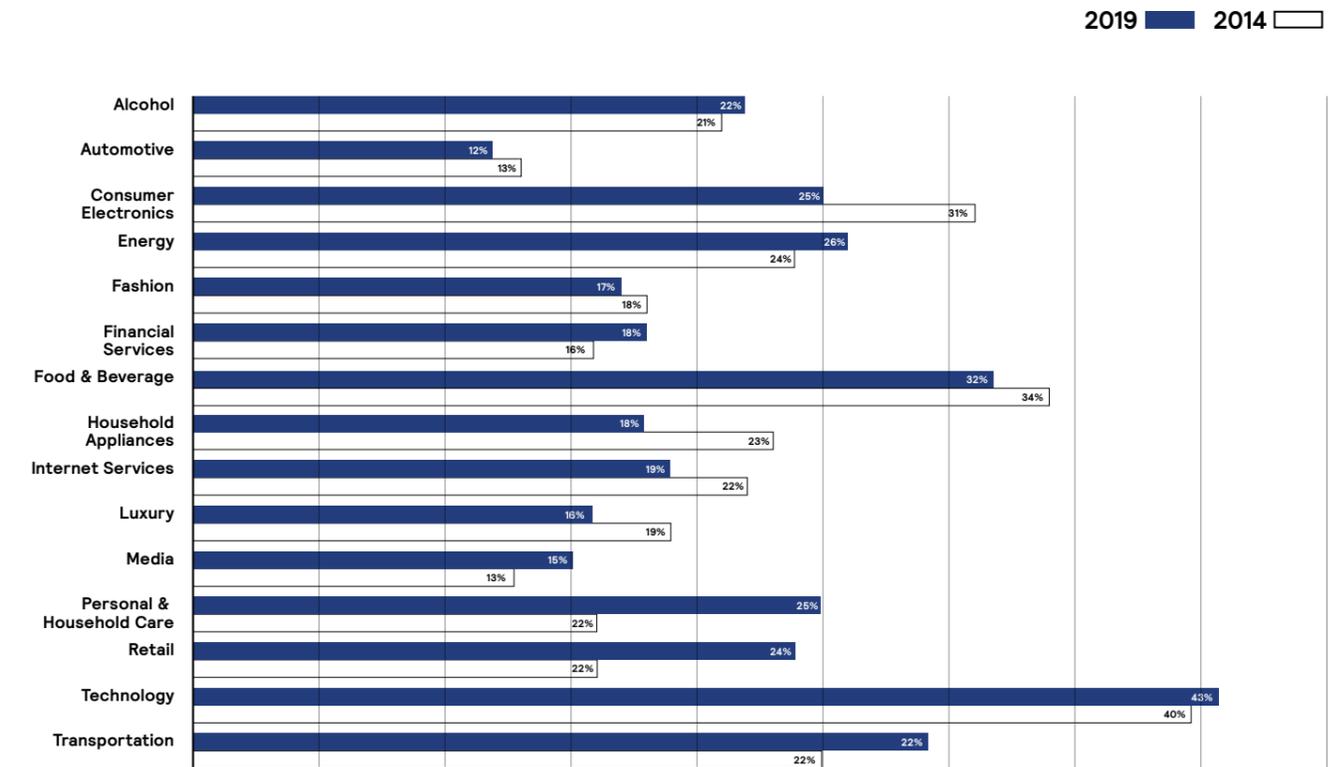
Resort & Lodging Options

“Rovaniemi Finland has become the center for winter fun in Finnish Lapland. And while Lapland has many incredible destinations for holiday travel in Finland, Rovaniemi is the destination that most families explore when in Lapland in winter. But there is so much more to Rovaniemi in winter than simply the best Lapland Christmas activities. So when we traveled here with our family, we wanted to explore all of the things to do in Rovaniemi Finland in winter.”

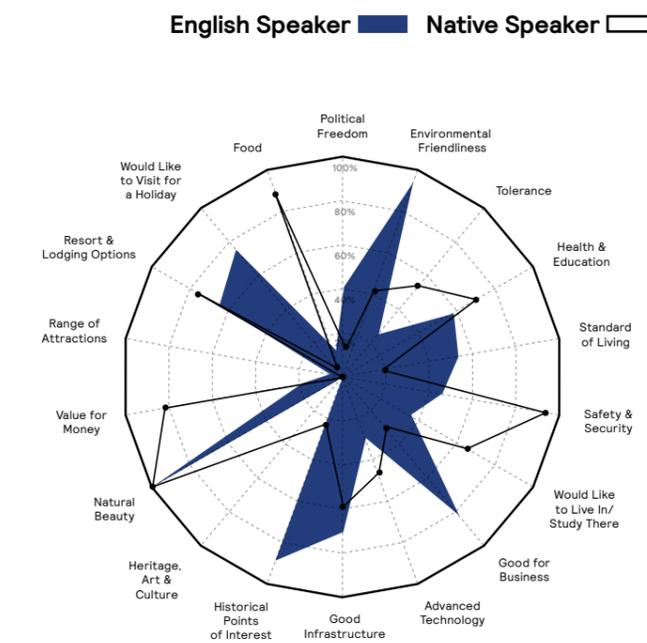
Range of Attractions

“It is common for Finnish people to take saunas every day and lead a healthy, active lifestyle.”

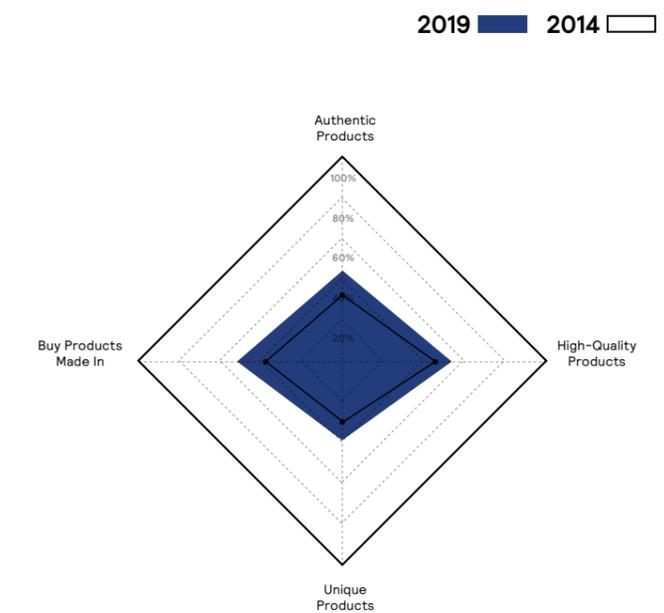
What is Finland most expert at?



In which areas does Finland stand out in social media conversations?*



Made In product perceptions and purchase intent





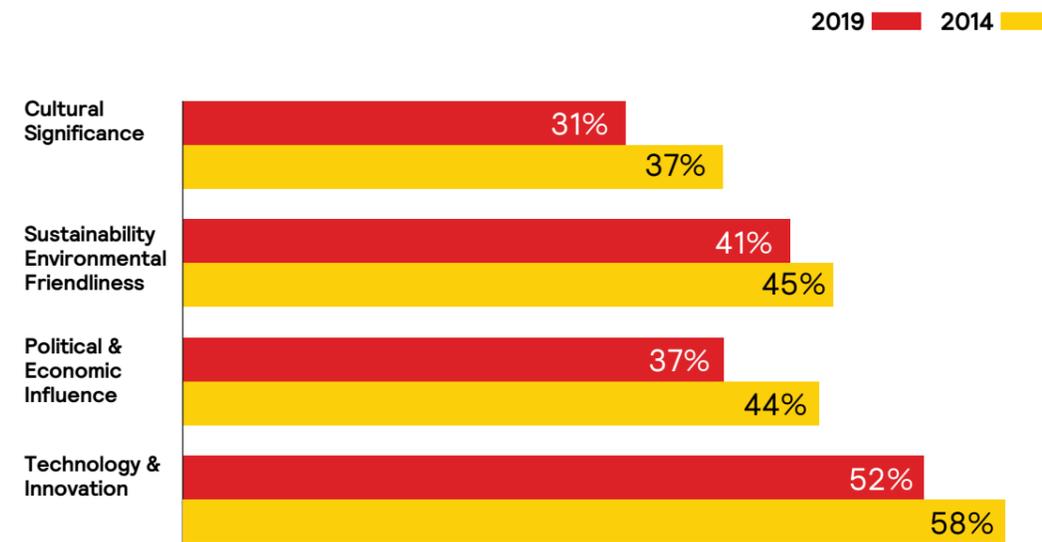
Germany

06
2019 FCI
Ranking

03
2014 FCI
Ranking

04
World Bank
Ranking

Current momentum 2019 vs 2014



Mentions in global social media conversations*

Advanced Technology

"You know what requires super precise, reliable, quality engineering? Lenses and scopes. And the best are made in Germany and Japan."

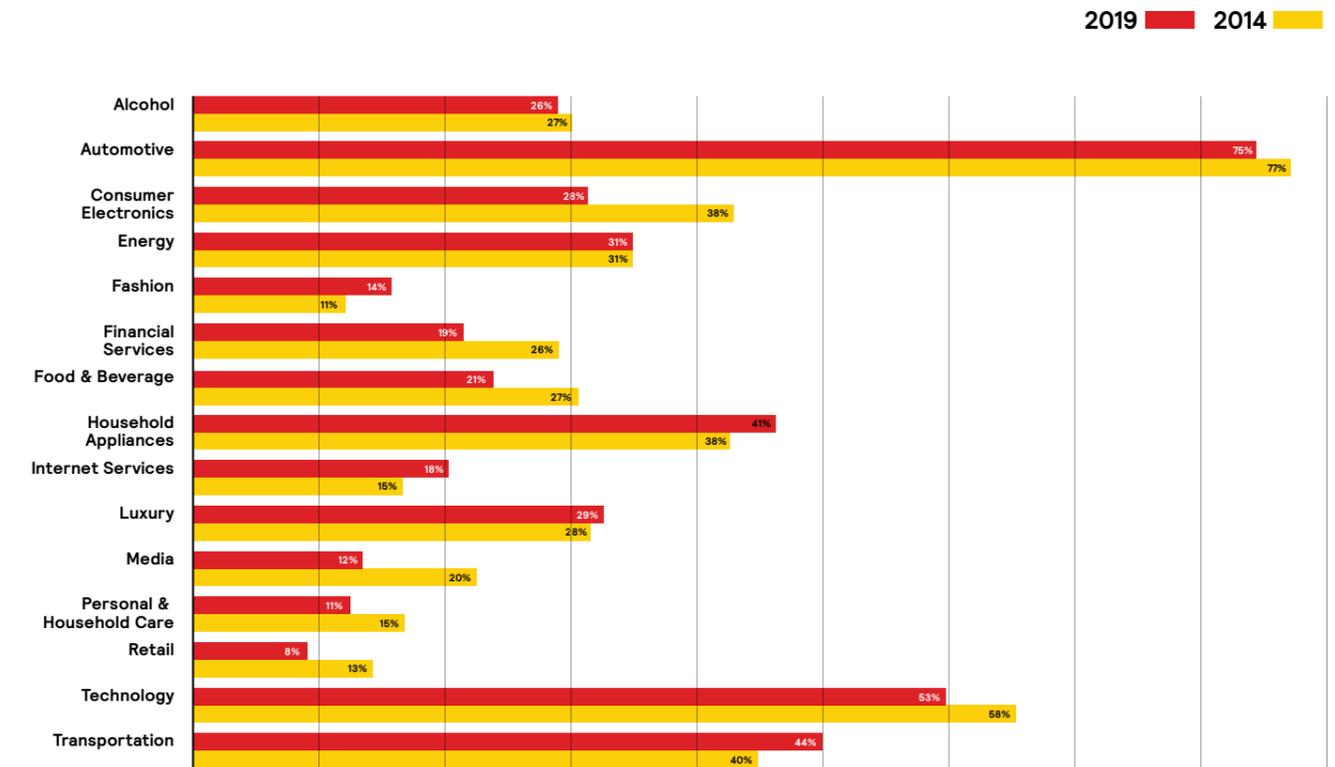
Heritage & Culture

"Beautiful Berlin! #germany #love #hamburg #history #berlinwall #educational #experience #amazing #architecture #buildings #art #Berlin #travel..."

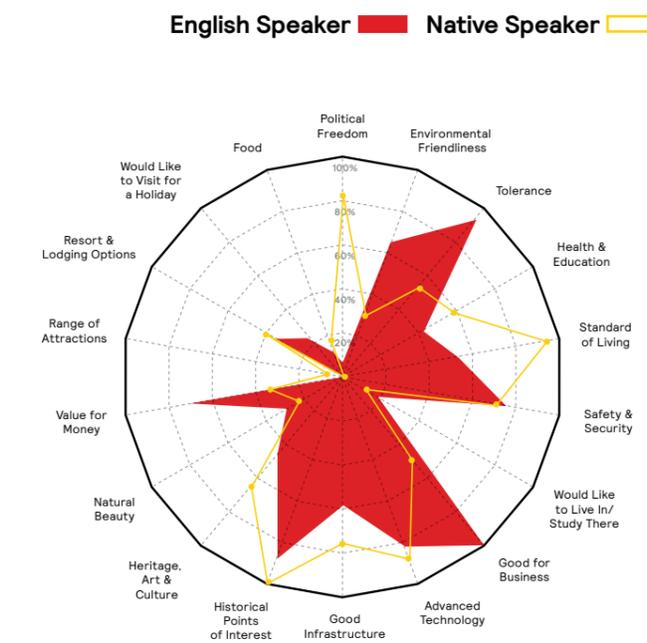
Standard of Living

"Germany has an advanced economy, and its elevated standard of living is underpinned by high levels of productivity and a world-class capital stock, including public infrastructure."

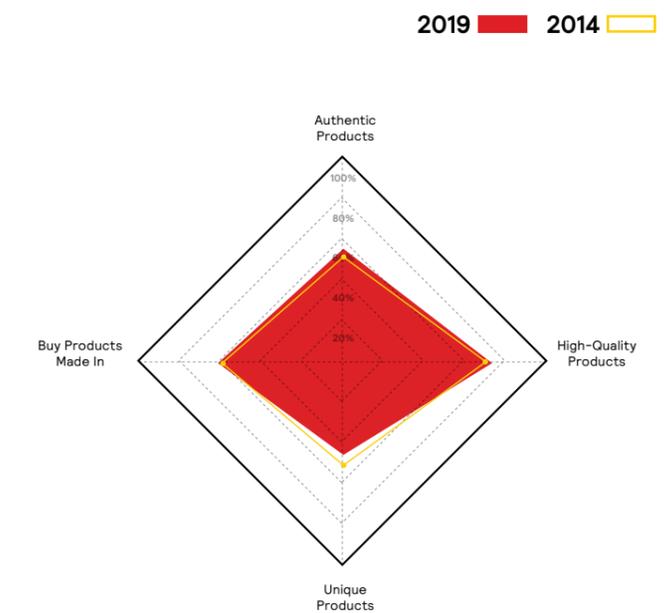
What is Germany most expert at?



In which areas does Germany stand out in social media conversations?*



Made In product perceptions and purchase intent





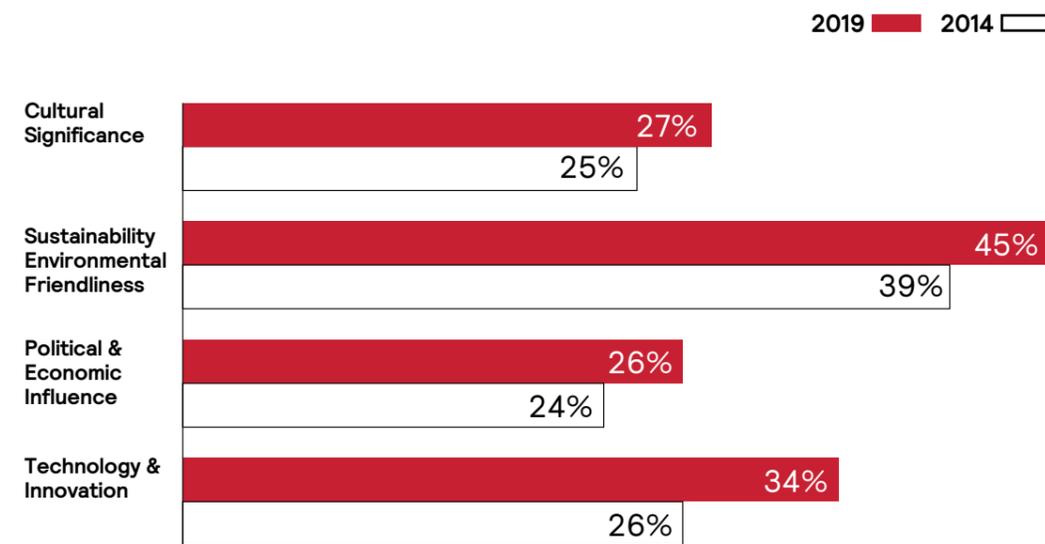
Denmark

07
2019 FCI
Ranking

09
2014 FCI
Ranking

35
World Bank
Ranking

Current momentum 2019 vs 2014



Mentions in global social media conversations*

Environmental Standards

“Since 2008, Selina Juul has lead an incredible non-profit consumer movement against food waste in Denmark. ‘Stop Wasting Food’ helped create the Joint Declaration Against Food Waste – an international document given to the European Parliament and the United Nations.”

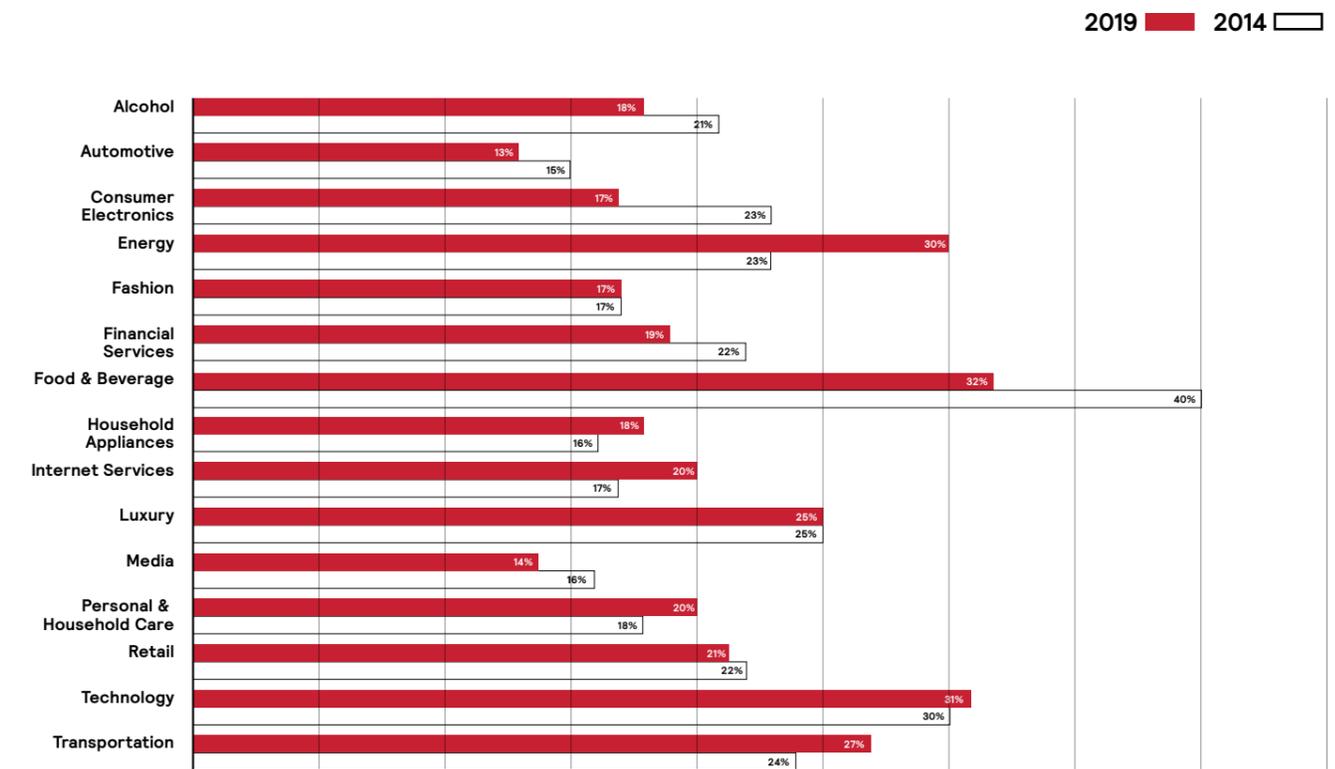
Advanced Technology

“Denmark boasts advanced technologies in old-city renovation. They provided us with environmental-protection technologies and we built the project together.”

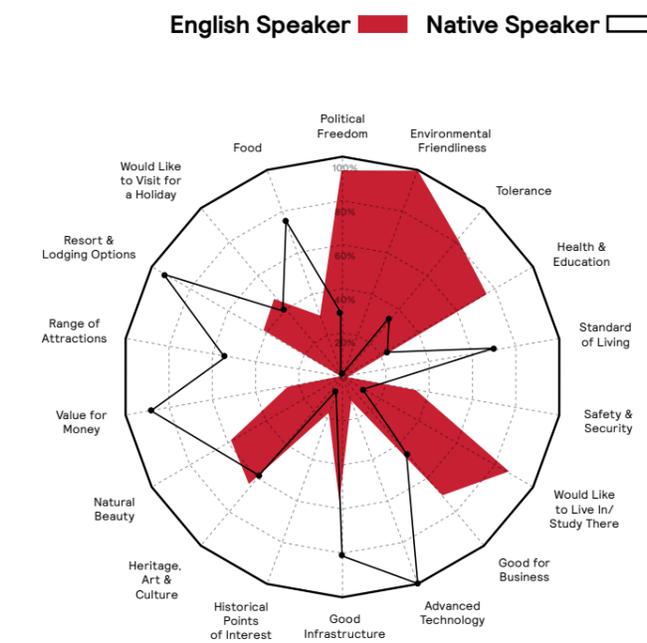
Cultural Significance

“Because of the high taxes, people don’t have to stress out about all uncertainties in life: free education, free healthcare, retirement benefits... Hygge plays a great part in Danish culture and it might be that “secret ingredient” for a happy life.”

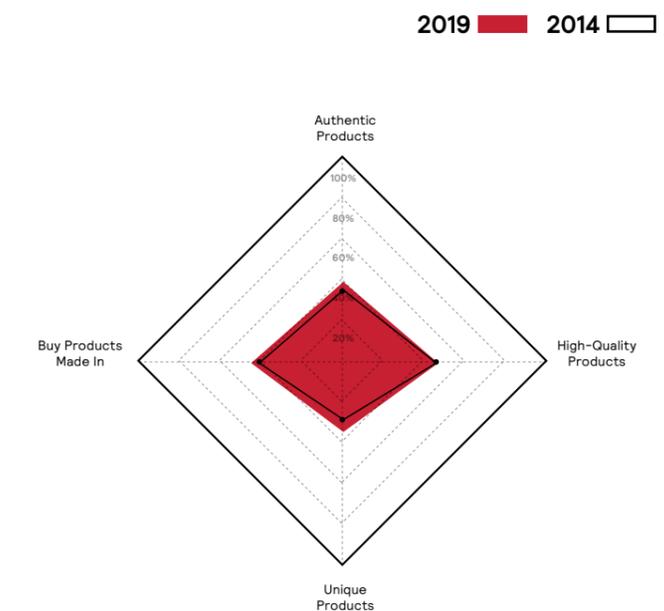
What is Denmark most expert at?



In which areas does Denmark stand out in social media conversations?*



Made In product perceptions and purchase intent





Canada

08
2019 FCI
Ranking

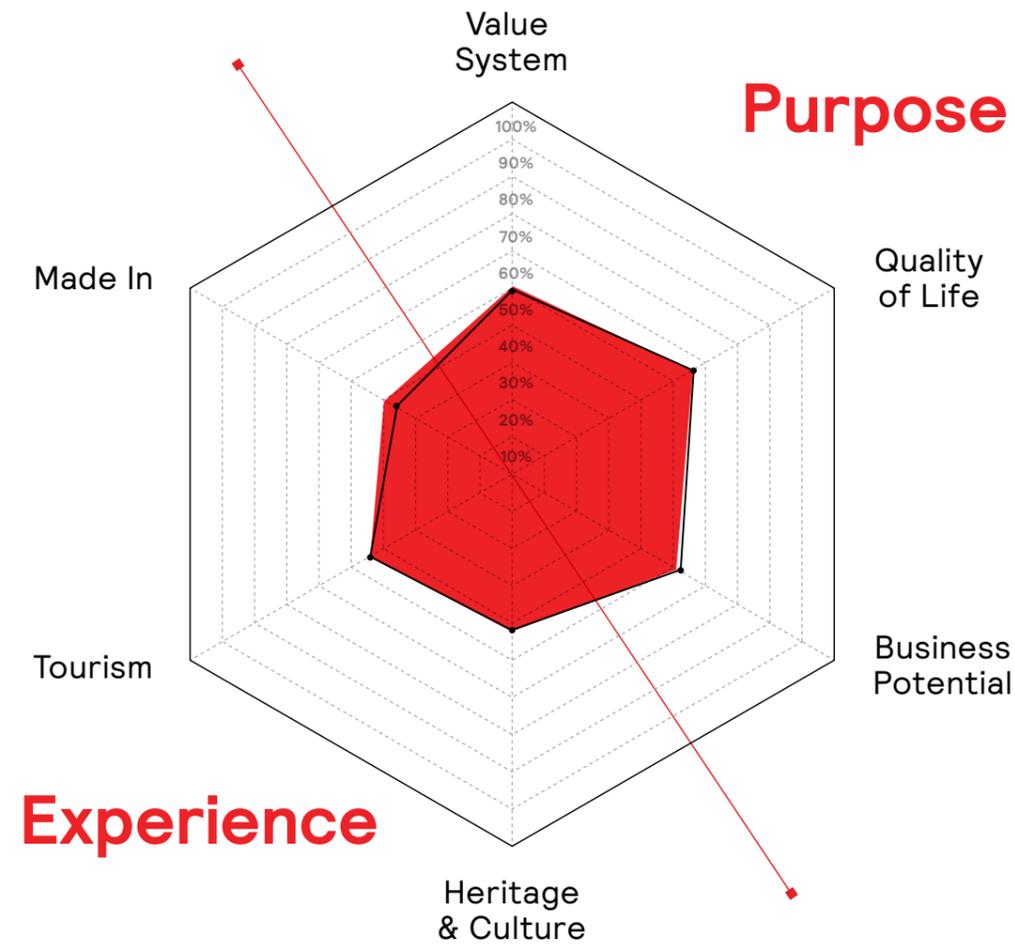
05
2014 FCI
Ranking

10
World Bank
Ranking

Summary of Perceptions

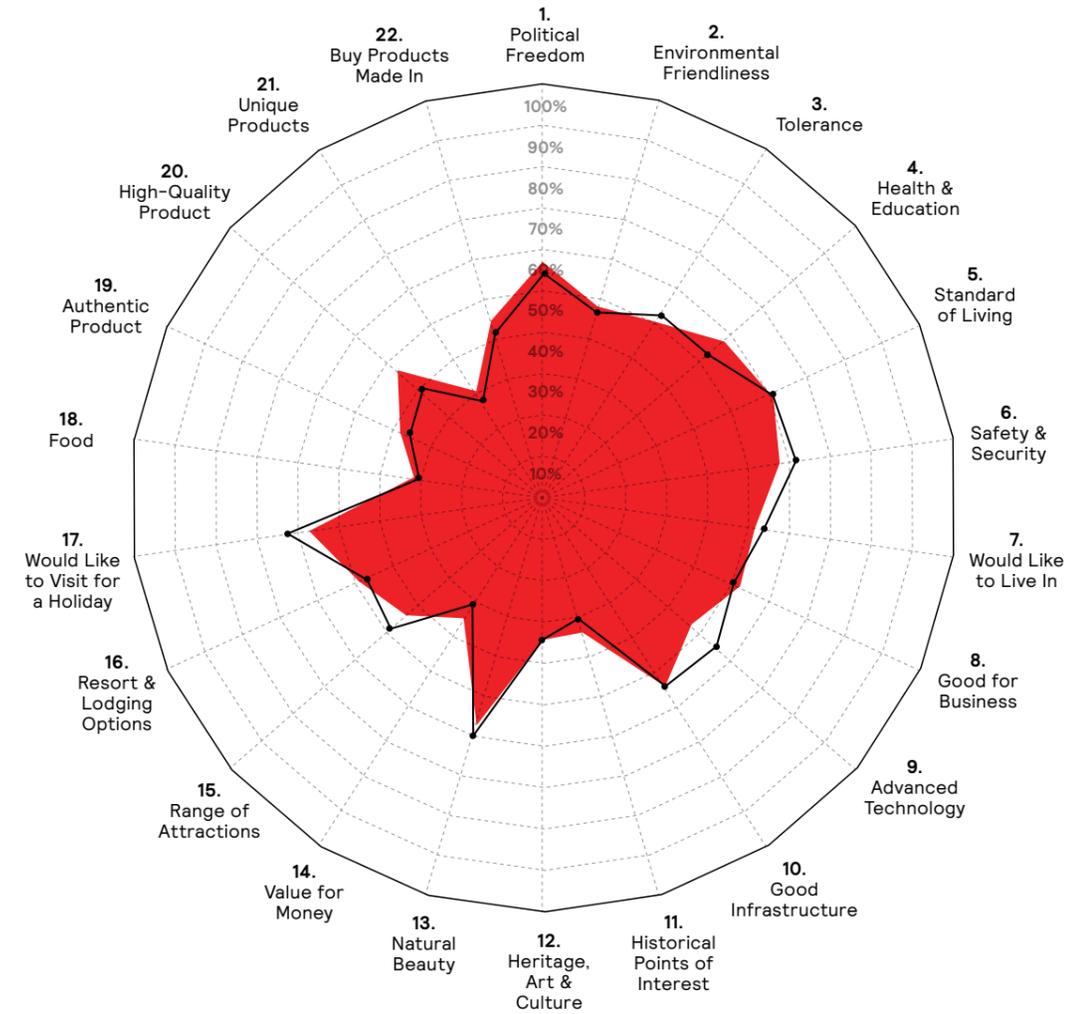
How does Canada perform by dimension?

2019 ■ 2014



What are the key associations with Canada?

2019 ■ 2014



Top-of-Mind Associations



Products & brands associated with Canada



Value System

1. Political Freedom
2. Environmental Friendliness
3. Tolerance

Heritage & Culture

11. Historical Points of Interest
12. Heritage, Art & Culture
13. Natural Beauty

Quality of Life

4. Health & Education
5. Standard of Living
6. Safety & Security
7. Would Like to Live In

Tourism

14. Value for Money
15. Range of Attractions
16. Resort & Lodging Options
17. Would Like to Visit for a Holiday
18. Food

Business Potential

8. Good for Business
9. Advanced Technology
10. Good Infrastructure

Made In

19. Authentic Product
20. High-Quality Product
21. Unique Products
22. Buy Products Made In



Canada

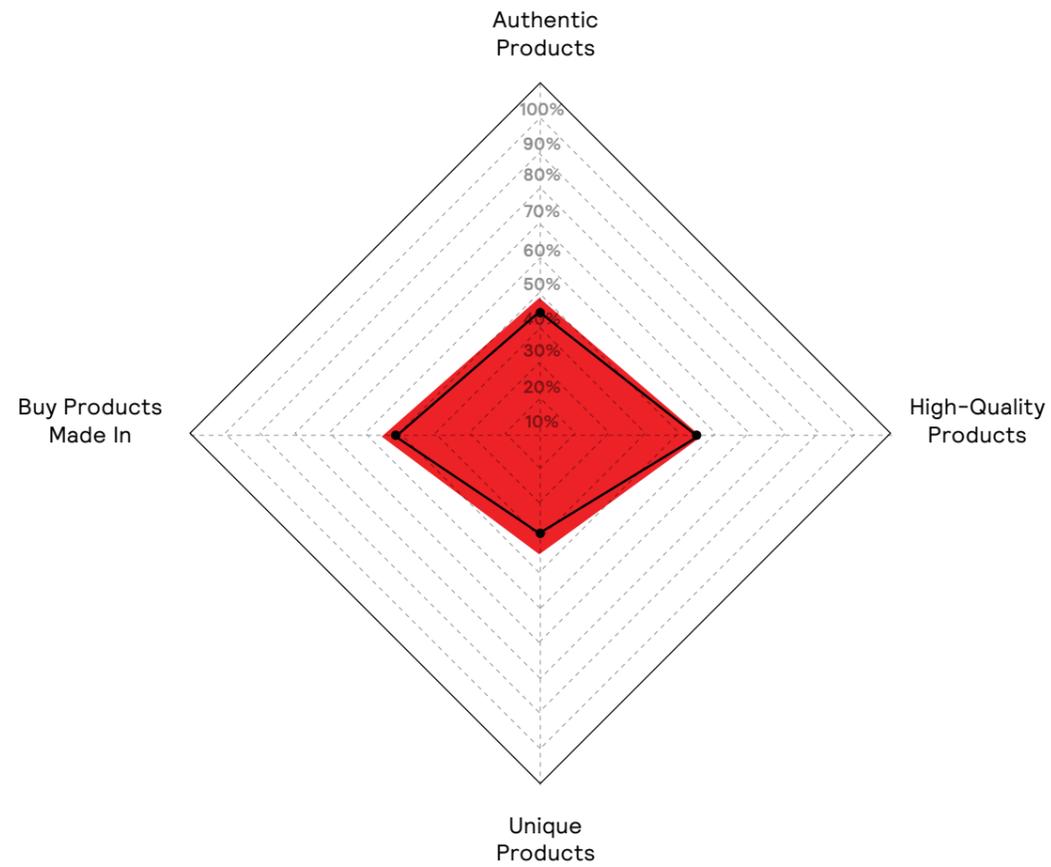
08
2019 FCI
Ranking

05
2014 FCI
Ranking

10
World Bank
Ranking

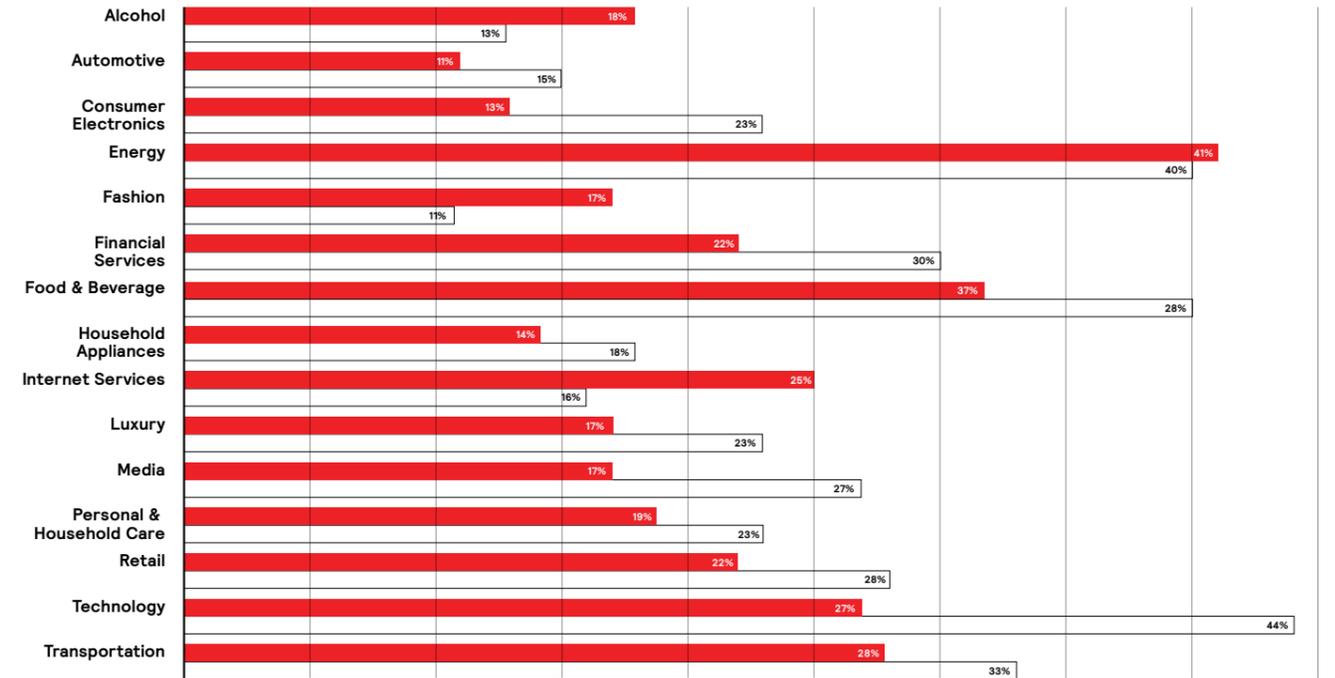
Made In product perceptions and purchase intent

2019 ■ 2014



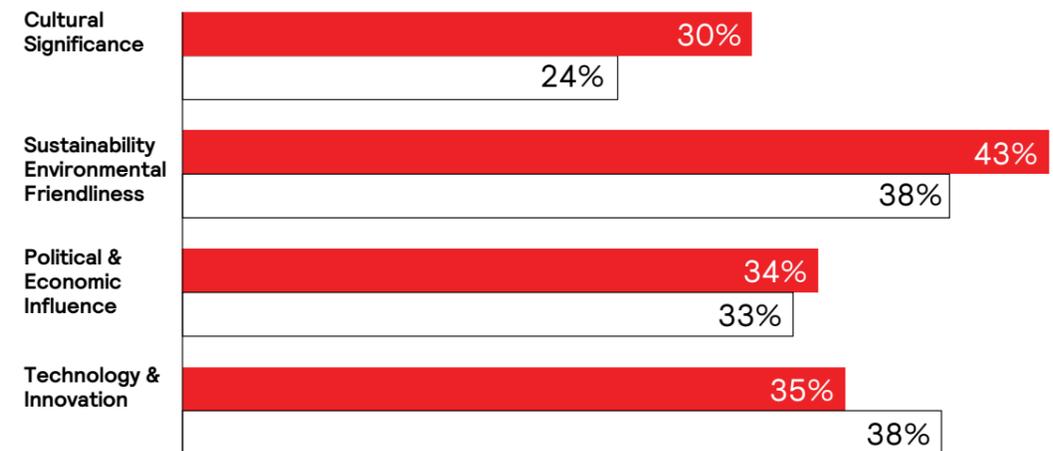
What is Canada most expert at?

2019 ■ 2014



Current momentum 2019 vs 2014

2019 ■ 2014





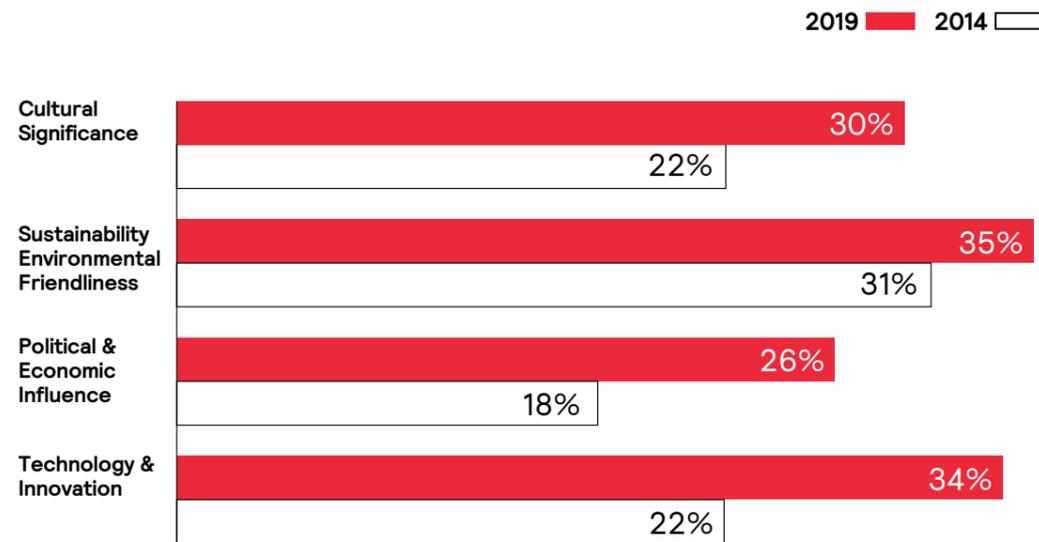
Austria

09
2019 FCI
Ranking

10
2014 FCI
Ranking

27
World Bank
Ranking

Current momentum 2019 vs 2014



Mentions in global social media conversations*

Heritage & Culture

“Imperial Palaces, elegant museums, and brilliant displays of architecture make this one of Europe’s loveliest cities to visit. #Vienna”

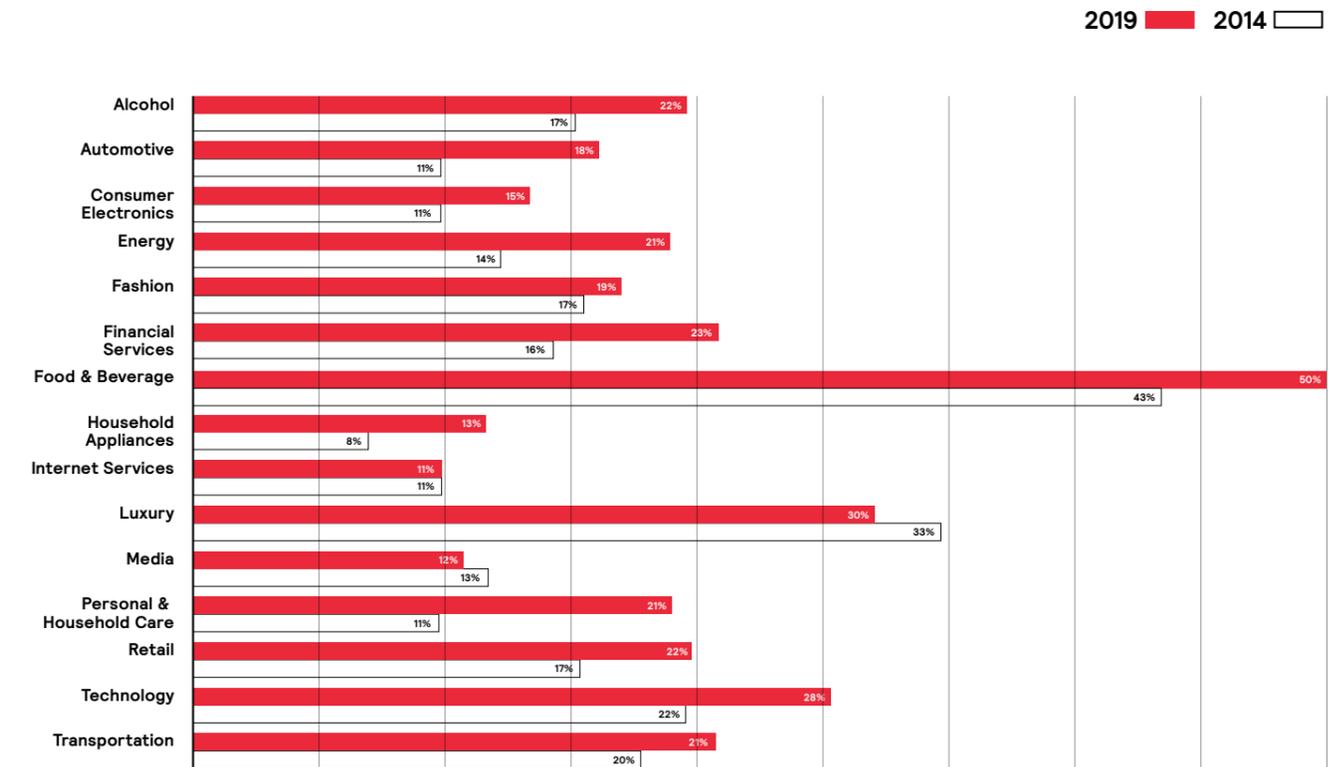
Cultural Significance

“The city’s former residents speak for themselves. Mozart, Wagner, Klimt, Strauss, Schubert, the list goes on and on.”

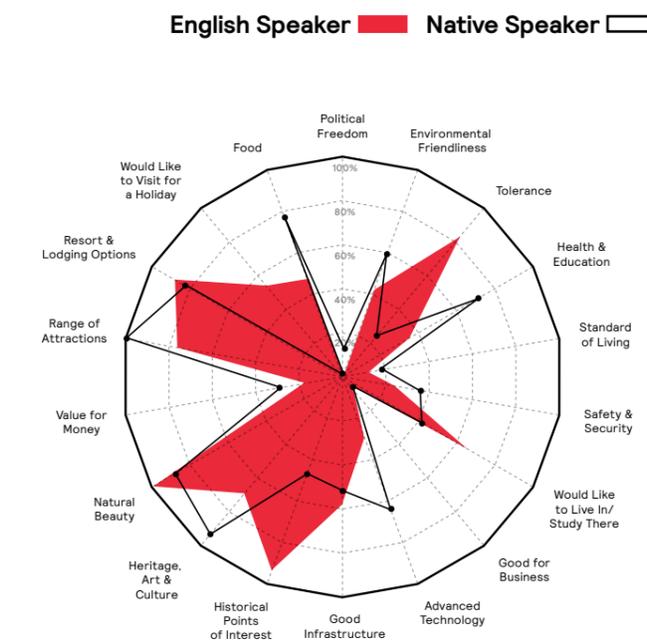
Natural Beauty

“Austria you’re beautiful #austria #lake #water #beautiful #travelblogger #travelling #nothingcompares #views #dimplights #mountains #photography #grabyourpassport #letstravel #bucketlist”

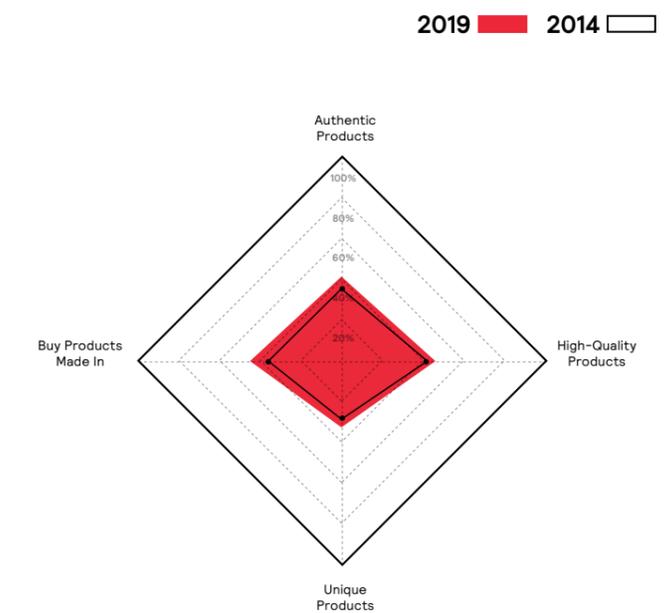
What is Austria most expert at?



In which areas does Austria stand out in social media conversations?*



Made In product perceptions and purchase intent





Luxembourg

10
2019 FCI
Ranking

-
2014 FCI
Ranking

73
World Bank
Ranking

Current momentum 2019



Mentions in global social media conversations*

Standard of Living

"Luxembourg is an advanced-economy landlocked country, one of the richest countries in Europe."

Good for Business

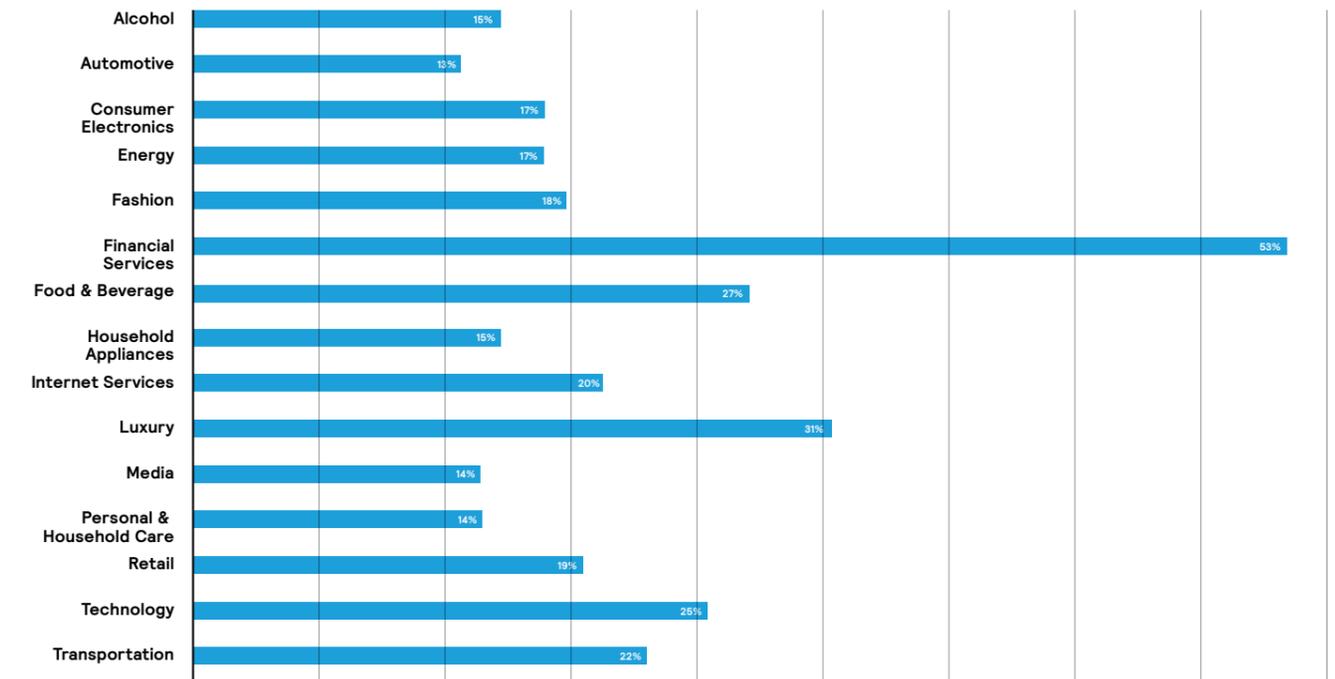
"Luxembourg is a very popular country to incorporate for tax and privacy reasons. So investments coming from Luxembourg are likely controlled by companies outside Luxembourg. Same with the Netherlands."

Technology

"Very happy to be the #Luxembourg #FinTechs #startup of the year at the #GalInFiance...#Luxinnovation #DigitalDueDiligence @ume_kyd."

What is Luxembourg most expert at?

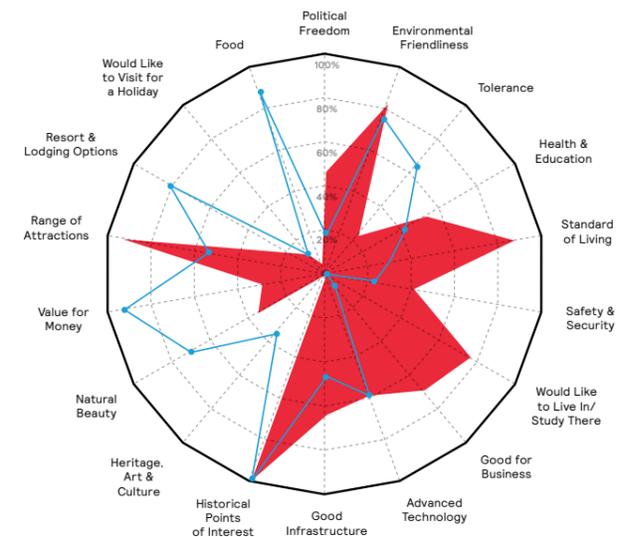
2019



In which areas does Luxembourg stand out in social media conversations?*

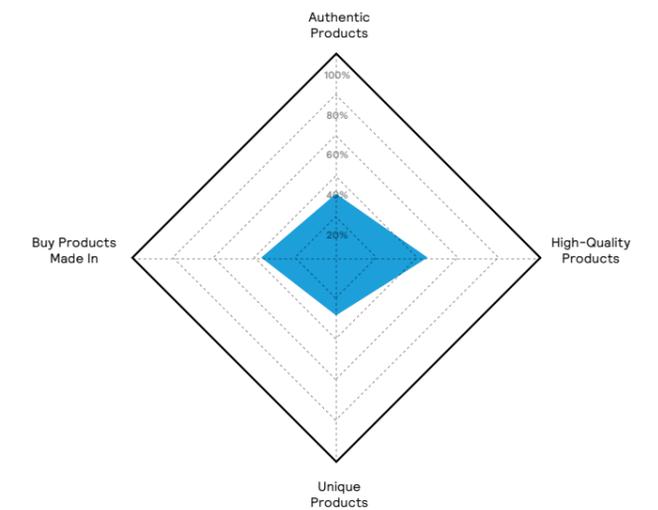
English Speaker (red) Native Speaker (blue)

2019



Made In product perceptions and purchase intent

2019

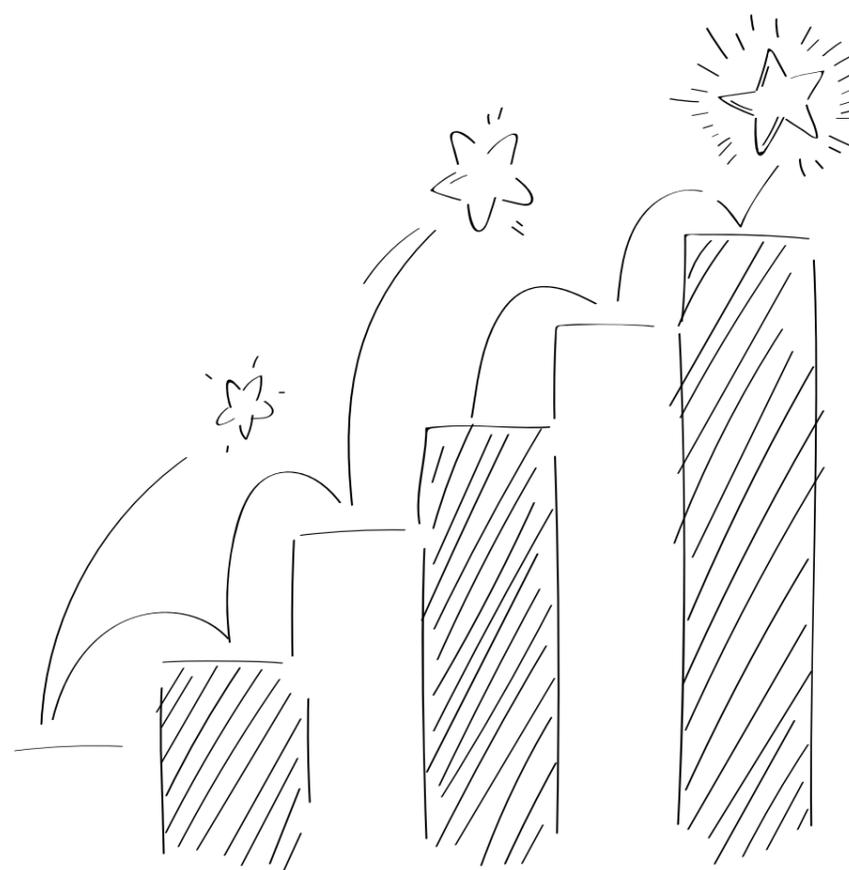


07

Top risers

Top five risers

Country	FCI Ranking		World Bank Ranking
	from 2014	2019	2019
Slovakia	+24	35	64
Romania	+20	42	48
Hungary	+18	38	56
Turkey	+13	40	17
Peru	+12	37	49



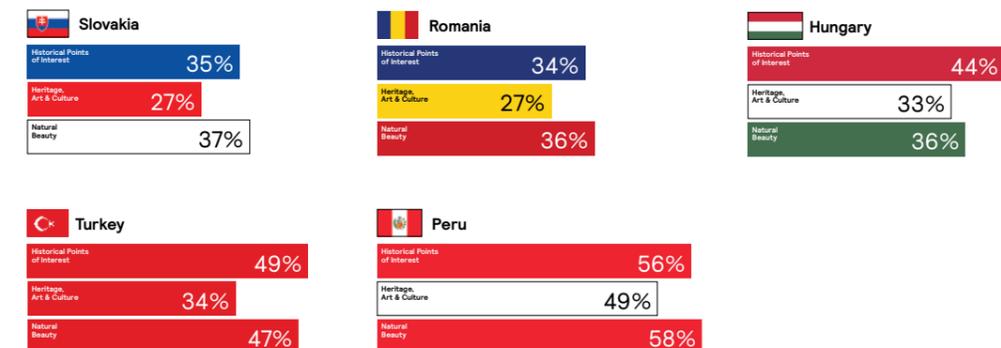
In addition to looking at countries with the strongest perceptions in 2019, we can gain insight by looking at the countries that have the most improved perceptions over time. Slovakia, Romania, Hungary, Turkey, and Peru all jumped significantly between our 2014 and 2019 studies, climbing between 12–24 places on our Index, and positioning them as the “rising stars” of Countrymaking. They have done the tough work of changing peoples’ impressions. How have these underdogs accomplished such a feat? The leading indicators clearly contributed: Quality of Life, Environmental Friendliness and the Made In factor improved across the board for these five countries.

As countries which failed to move up our rankings will have realized, changing perceptions is no easy task. In the modern world where information is available at the touch of a button and news is on our screens 24-hours a day, it's increasingly difficult to move the needle quickly.

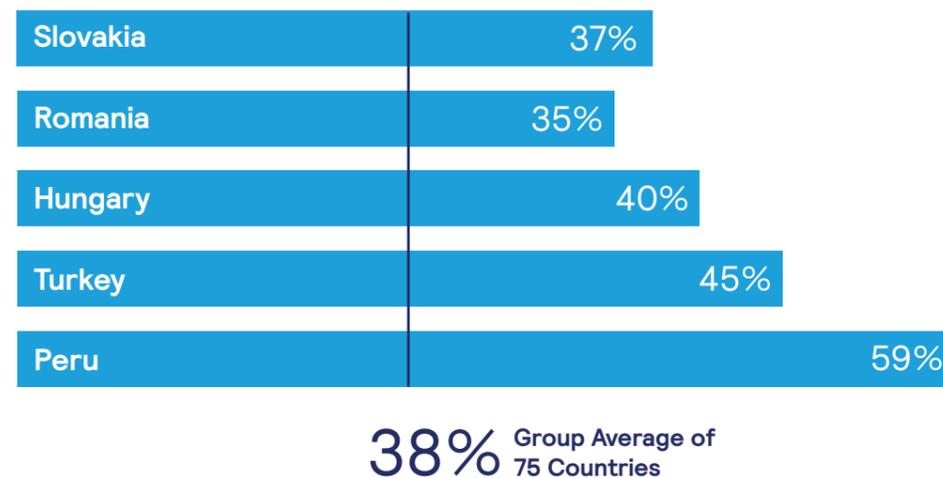
But there is another factor at play that's making a difference: Heritage & Culture (which in our study, includes Historical Points of Interest and Natural Beauty). Among all five countries deemed "top risers," Heritage & Culture stands out as the highest-scoring association dimension. For Slovakia, Hungary, and Romania, words like "beautiful," "culture," "art," and "food" are top of mind for potential visitors, showing that **these Eastern European countries may be stepping out of the shadow of more traditionally popular Western European destinations.**

2019 Heritage & Culture associations for top five risers

Slovakia, Romania, Hungary, Turkey, Peru



Top five risers 2019 Heritage & Culture score



*Percentage of respondents who rated "Performs very strongly" based on the following statement: "How does this country rate on: Heritage & Culture?"

Culture lends a nuanced perspective of a country's history and also brings together current tastes. Consider Turkey – a blend of tradition and modernity. Once the heart of the Ottoman Empire, today Istanbul serves as the meeting place of East and West, home to centuries-old mosques (including the famous Blue Mosque) and world-famous markets, not least the Grand Bazaar, one of the globe's largest and oldest covered markets. Meanwhile, Romania's home to eight World Heritage sites, including the Voronet Monastery, one of the country's most popular attractions.

And in Hungary, there is a rich and varied tradition of embroidery, pottery, and carving crafts, maintained over centuries that informs much of their cultural vibrancy today.

With most of its political turbulence in the rearview mirror, Slovakia now boasts a reputation for both its historical monuments and breathtaking natural beauty, and welcomed a record number of both domestic and foreign visitors – in fact, in 2017, the number of tourists paralleled the country’s population. Peru also introduced measures to make more of – and preserve – its cultural and heritage assets.

Exporting specialty goods such as silver, copper, and alpaca textiles along with their world-renowned cuisine, thanks to culinary ambassador Gastón Acurio, Peru continues to garner praise and recognition as their cultural influence continues to grow. Peru’s most famous destination, Machu Picchu was also deemed a UNESCO World Heritage Site, and the government also introduced additional measures to prevent any further deterioration of the 15th-century site, a nod to their growing emphasis on preservation.

As a new world order emerges, based on Heritage & Culture, the countries most watched for their rising economic dominance – Brazil, Russia, India, China, and South Africa (BRICS), didn’t crack 2019’s top 20, and China, South Africa, and Brazil all dropped in the rankings. Russia and India both performed well in both Natural Beauty and Historical Points of Interest, further highlighting a fundamental shift in perception at play.

More and more, Culture is becoming a critical export shaping the impression of a country on the world stage as much as hard goods, technological innovations, or natural resources and commodities. And how culture is cultivated, and shared with the world is becoming an increasingly important industry.

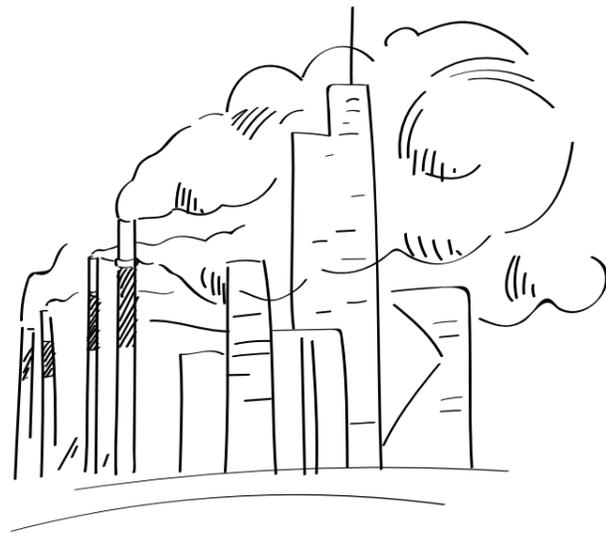
08

China

For a nation that prides itself on both economic and cultural achievements, not to mention it boasts the largest population in the world, it's difficult to imagine China is happy with its ranking. Although it only dropped down one spot in the past five years, China still languishes in the 29th position, sandwiched between Kuwait and Saudi Arabia.

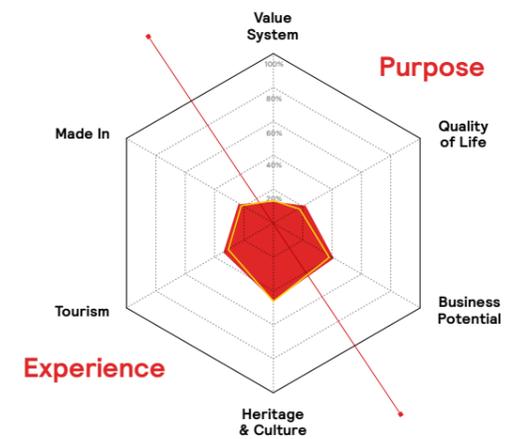
What is holding China back? In our last report, we envisaged China 'moving forwards', buoyed by its business, innovation, and technological potential. We highlighted China as a country that people were Likely to Visit. Something appears to have gone wrong.

Instead of climbing up the board, China's attractiveness to tourists increasingly waned, likely held back by concerns over Tolerance, Political Freedom, Safety & Security, as well as Value for Money, all of which fared badly in our Index this year.



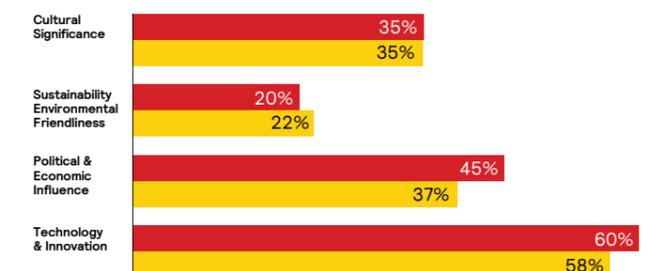
How China performs by dimension

2019 ■ 2014 ■



China's current momentum 2019 versus 2014

2019 ■ 2014 ■



Ongoing news coverage of China's record on human rights continues to deter visitors and, for that matter, those looking to settle in the country and establish businesses. Take for instance, internet censorship.

Thousands of websites aren't accessible in China, making it home to one of the most extensive online blackouts in the world. Recently, all language editions of Wikipedia have been blocked, joining WhatsApp, Gmail, Dropbox and many prominent websites and digital services. In the 21st century where connectivity is key, unfettered access to email, apps, and websites is crucial.

And with both industrial production and retail sales cooling, the escalation of the US-China trade war couldn't have come at a worse time. US-Chinese trade negotiations aren't going anywhere and tensions are rising with Canada too, following the arrest of a senior Huawei executive last year.

But the curtailing of personal and professional freedoms aren't the only factors affecting China's attractiveness to tourists, would-be residents, and investors. The environment and how we treat it is currently top of mind for the public, and China has much to answer for.

Leaving aside the significant health risks posed by its water and air pollution (an independent study in 2015 estimated that 1.6 million people die in China each year from heart, lung, and stroke problems caused by polluted air), China's rapid economic development has come with a steep cost: the environment. The Chinese government will not make any sweeping changes to reverse these environmental damages either, as they have their sights set exclusively on the economy.

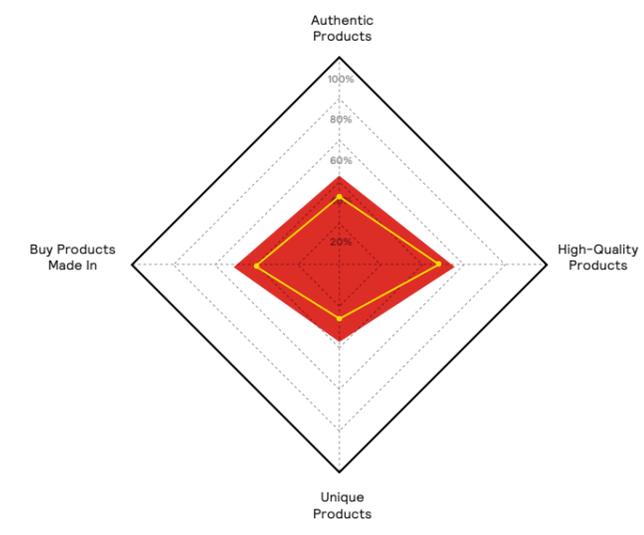
Despite all this, there are reasons to be optimistic for the future as China's major brands continue to gain global attention. While China's leading premium brand Kweichow Moutai, the e-commerce giant Alibaba Group, and Asia's largest tech firm Tencent will have to hunker down and weather trade tensions, they are definitely ones to watch over the next five years.

And our Index continues to show a positive percentage for Historical Points of Interest – after all, what country could compete with The Great Wall of China and The Forbidden City? Over the next three years, we expect both Beijing and Shanghai to be in the top ten list of most influential global cities increasingly favorable to tourists.

Nevertheless, in the Year of the Pig, China has much work to do to convince people that it should be rubbing shoulders with top performers like Japan, Norway, and Switzerland.

China's Made In product perceptions and purchase intent

2019 ■ 2014 ■



09

United States & United Kingdom

They are among the most advanced, democratic, and diverse countries in the world. But when it comes to brand strength and attractiveness to visitors and investors alike, their popularity continues to take a nosedive.

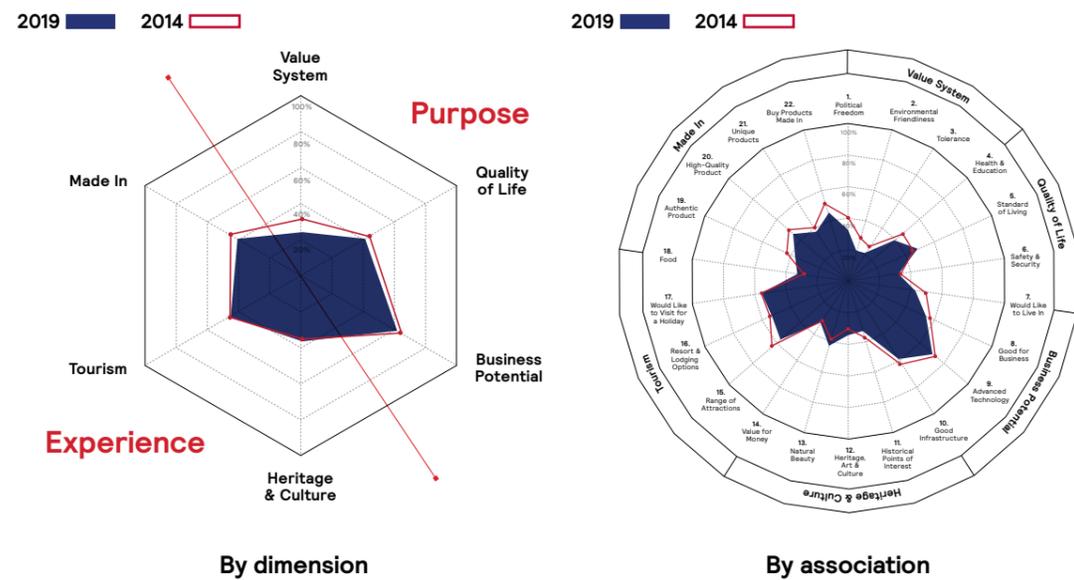
Since our last report, the US slipped five spots to 12 while the UK has fallen seven spots to 19. It will come as cold comfort to the 2019 British Eurovision entrant (who came last in this year's competition) that he's not the only UK performer turning up short.

Let's take a closer look at what has happened on both sides of the pond. For the US, dominated in the global consciousness by its current figurehead, President Donald Trump, a number of key attributes have all fallen (albeit by relatively small margins): Recommend to Visit, Good To Do Business With, and Made In. During the same period, the UK has suffered pretty much across the board, with only slight increases in a handful of categories, and an abysmal rating for Value for Money.

Are politics alone to blame for these lackluster figures? Both countries fare particularly badly when it comes to Tolerance. Divisiveness dominates headlines in the US with stories of children separated from their parents at the US-Mexico border, Trump's call for a border wall, and additionally the wave of new legislation at the state level, adding fuel to the fire. Accusations of voter suppression and gun rights in the midst of a public health crisis are splitting the country across party lines.

The Trump administration's position on climate change and reversal of Obama policies may have contributed to the in the US ranking as poorly on Environmental Friendliness as it did for Tolerance. The removal of protections for prized and much-beloved landmarks, the scrapping of laws on waste-dumping, and the renewed commitment to fossil fuels together may inform the United States' current Environmental Friendliness score.

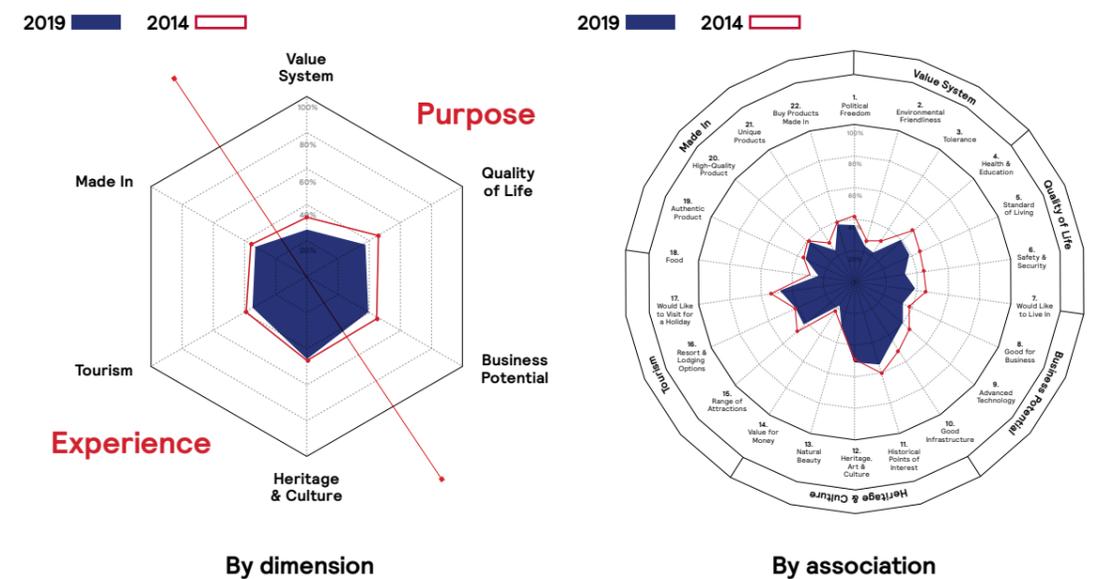
How the United State performs by dimension and by association



When we published our last study, we pointed to extremism and migration as dominant themes that would impact future perceptions of countries. And so, it has come to pass. Both the US and UK are now perceived as less inviting to tourists, visitors, students, and investors who question the policies now informing and ultimately shaping the Value Systems in these nations.

In 2019, individuals and companies are more likely to buy products and services from countries on their list of preferred places to visit or invest in, which Japan proudly benefits from. Yes, the US and the UK boast globally recognized brands such as Alphabet Inc. and Vodafone respectively. US headquartered Nike made worldwide headlines when it signed activist and former quarterback Colin Kaepernick to its “Just Do It” campaign, but there’s more to it than that. With the uncertainty over Brexit and the ongoing international trade issues between the US and China, both countries need to reclaim lost ground in order to experience benefits from positive country brand perception.

How the United Kingdom performs by dimension and by association



10

2019 Regional ranking

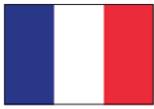
Asia Pacific

Country	FCI Ranking		
	2019	2014	From 2014
 Japan	1	1	=
 New Zealand	11	11	=
 Australia	15	8	-7
 Singapore	18	14	-4
 South Korea	20	20	-
 Hong Kong, China	24	-	-
 China	29	28	-1
 Thailand	39	38	-1
 India	41	50	+9
 Malaysia	45	48	+3

Country	FCI Ranking		
	2019	2014	From 2014
 Myanmar	49	-	-
 Indonesia	56	66	+10
 Sri Lanka	58	60	+2
 Kazakhstan	59	-	-
 Vietnam	61	64	+3
 Philippines	67	-	-
 Bangladesh	71	72	+1
 Pakistan	73	73	-

Europe

Country	FCI Ranking		
	2019	2014	From 2014
 Norway	2	6	+4
 Switzerland	3	2	-1
 Sweden	4	4	-
 Finland	5	13	+8
 Germany	6	3	-3
 Denmark	7	9	+2
 Austria	9	10	+1
 Luxembourg	10	-	-
 Netherlands	13	16	+3
 Italy	14	18	+4

Country	FCI Ranking		
	2019	2014	From 2014
 France	17	17	-
 United Kingdom	19	12	-7
 Belgium	21	22	+1
 Spain	23	23	-
 Portugal	25	27	+2
 Russia	27	31	+4
 Czech Republic	32	29	-3
 Ireland	33	21	-12
 Greece	34	30	-4
 Slovakia	35	59	+24

Europe

Country	FCI Ranking		
	2019	2014	From 2014
 Hungary	38	56	+18
 Turkey	40	53	+13
 Romania	42	62	+20
 Poland	44	45	+1
 Ukraine	74	74	-

Latin America

Country	FCI Ranking		
	2019	2014	From 2014
 Argentina	36	42	+6
 Peru	37	49	+12
 Chile	43	46	+3
 Panama	46	41	-5
 Brazil	47	43	-4
 Cuba	48	-	-

Country	FCI Ranking		
	2019	2014	From 2014
 Costa Rica	50	37	-13
 Ecuador	53	-	-
 Colombia	54	63	+9
 Guatemala	57	-	-
 Mexico	64	55	-9
 Dominican Republic	70	-	-

Middle East

Country	FCI Ranking		
	2019	2014	From 2014
 UAE	16	19	+3
 Israel	22	26	+4
 Qatar	26	24	-2
 Kuwait	28	-	-
 Saudi Arabia	30	39	+9
 Oman	31	34	+3
 Iran	72	71	-1
 Iraq	75	-	-

North America

Country	FCI Ranking		
	2019	2014	From 2014
 Canada	8	5	-3
 United States	12	7	-5
 Puerto Rico (U.S. territory)	62	33	-29

Africa

Country	FCI Ranking		
	2019	2014	From 2014
 South Africa	51	40	-11
 Ethiopia	52	-	-
 Egypt	55	54	-1
 Algeria	60	-	-
 Kenya	63	65	+2
 Sudan	65	-	-
 Morocco	66	57	-9
 Nigeria	68	75	+7
 Angola	69	-	-

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2019 Cities



Most influential cities

City	City Ranking			City	City Ranking		
	2019	2014	From 2014		2019	2014	From 2014
New York	1	1	=	Dubai	11	10	-1
London	2	2	=	Singapore	12	12	=
Beijing	3	3	=	Delhi	13	13	=
Washington	4	4	=	Brussels	14	-	-
Paris	5	7	+2	Los Angeles	15	16	+1
Moscow	6	5	-1	Seoul	16	19	+3
Tokyo	7	6	-1	Istanbul	17	21	+4
Hong Kong	8	11	+3	Sydney	18	22	+4
Shanghai	9	9	=	Toronto	19	18	-1
Berlin	10	8	-2	Rome	20	17	-3

*Rank based on respondents who rated "Performs very strongly" based on the following statement: "Regardless of Country, in your view, in the next 3 years, which 3 cities will be the most influential in the world?"

Cities provide a powerful sense of place marked by the highs and lows of urban life – whether that’s crime, cost of living, infrastructure, or culture. In the 2019 Index’s list of the most influential cities, New York retains its top placing even though the so-called ‘Trump effect’ has been blamed for falling numbers of international students and fewer tourists across the US. London has hung on to the number two spot despite an alarming rise in knife crime, while Beijing is still in third place in the face of a potential US-China trade war.

But a close look at the challengers for the pre-eminent positions is where it gets really interesting. Hong Kong is up three places, Paris by two and Seoul by three. Both Istanbul and Sydney have climbed four rungs up the ladder. These aren’t meager gains.



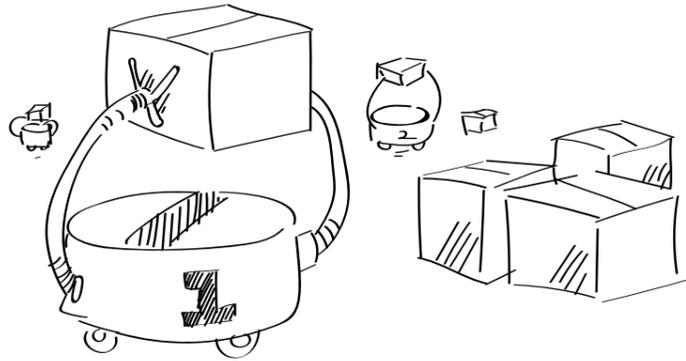
France welcomed a record number of tourists in 2018 even though the weekly Yellow Vest protests in Paris and other big cities have sparked violent clashes and riots. In fact, Paris is now the most popular destination for international conferences. It's also unlikely that the devastating fire at Notre Dame Cathedral will dent visitor enthusiasm given the glut of unique and iconic landmarks in the capital city.

Although Hong Kong is, for official purposes, part of China, it hasn't suffered in the same way as a desirable destination – and only time will tell whether the recent protests might change that. In our 2019 country rankings, China sits in 29th position while, as far as influential cities are concerned, Hong Kong sits proudly in the eighth spot. This prosperous and cosmopolitan city with its rapid technological growth is one of the world's leading financial, banking, and trading centers, serving also as a major transport hub.

As for Seoul, its geographical location may not make it the most convenient choice for tourists, investors, and businesses, but the 2018 Winter Olympics did much to raise South Korea's profile. Today, South Koreans enjoy a standard of living comparable to other developed countries with Seoul home to 25 million people. Then there are the brands: Samsung, the world's largest phone manufacturer, is headquartered in Seoul as are LG Electronics and Hyundai. And South Korea recently retained the global crown in the Bloomberg Innovation Index for the sixth year in a row.

Turkey, meanwhile, is one of 2019's top risers, helped no doubt by the continuing popularity of Istanbul. The city's cultural and heritage attractions are second to none, and seem to outweigh the distressing nature of recent events including a failed coup, murdered journalists, suppressed opposition, and the all-pervading influence of President Tayyip Erdoğan.

However, spare a thought for Toronto and Rome. With the latter's wealth of history and world-famous sites (the Colosseum, Roman Forum, and Trevi Fountain), surely it should be ranked higher than 20? Not only that, it has fallen three places since 2014. And Toronto, renowned for its ethnic diversity and cultural attractions, is down one to 19. The city is home to the Toronto Stock Exchange and the headquarters of Canada's five largest banks, not to mention many other large Canadian and multinational corporations. Nevertheless, it continues to barely cling on to its place in the top 20.



The unsuspecting underside of the Fourth Industrial Revolution: Workforce displacement, wage gaps, and class strife

Self-driving trucks. “Cobots” fulfilling Amazon orders side by side with warehouse employees. Surgical robots “scrubbing in” for operations. This is the workforce of the future. The Fourth Industrial Revolution promises to change everything from manufacturing to medicine with automation, robotics, and AI. It’s easy to assume that the first countries to mainstream these technological advancements will transform their standing on the world stage. To harness what is possible will be a leap in human progress.

But there are downsides to this revolution that stand to hinder countries’ potential as centers of investment, work, study, and life. **The same technology that will offer lifesaving surgeries even in the most remote, rural areas will inevitably take the jobs of millions and increase income inequality** for an already squeezed middle class, further growing the ranks of the struggling lower classes.

As we saw in this year’s Index, a country’s strength lies not just in its prosperity, but in its ability to provide a high quality of life for all of its citizens. Countries at the forefront of revolution that seek to safeguard their (country brand) strength must counterbalance the negative effects of rapid innovation with measures to preserve quality of life across the board.

If they don’t, the eroding forces of job displacement and income inequality will win, and the superpowers of yesterday will be unseated by countries that are able to maximize the prosperity of their people, not just the prosperity of their industry.

Glimmers of hope lie in the same human ingenuity that creates this groundbreaking technology. Universal Basic Income is one idea that, while controversial, has already been embraced by governments like Finland on an experimental basis. More agree on the need for workforce retraining and re-skilling. In the United States, the private sector is taking proactive steps, such as Best Buy, which has set a 2020 goal of preparing one million teens in under-represented communities for technology-related jobs. In Canada and then Germany, public-private partnerships prepare employees with emerging technology skills.

How will countries prepare their population and workforce for the complex dynamic reality of this new revolution? This is the question they need to answer; the future of work will not be the same.

12

Future focus



The Gender Equation: Unlocking the potential of ½ the world

#timesup. #metoo. Gender equality now stirs a global social discourse, no longer solely the domain of the political sphere or highbrow forums like Davos. **“Human rights are women’s rights and women’s rights are human rights” declared former American diplomat and first lady Eleanor Roosevelt, when chairing the United Nations Human Rights Commission.** The landmark Universal Declaration of Human Rights recently turned 70 years old. And now more than ever, we see some of the top countries in the Index strive to make these words ring true.

Women and men around the world are advocating for robust new policies, programs, and initiatives to address and close the gender gap – promoting gender equality in both education and employment.

According to the World Bank report **“Missed Opportunities: The High Cost of Not Educating Girls,”** female primary school enrollment continues to increase, but completion remains a challenge. And limiting these educational opportunities for women comes at a steep cost: **\$15 trillion and \$30 trillion in lost lifetime productivity and earnings, respectively.**

The top 10 countries in this year’s Index provide an instructive map for unlocking the potential of women and elevating their contributions both at work and at home. With policies addressing reproductive health, maternal mortality, the proportion of women in positions of leadership, economic status, education level, and protections to eradicate violence against women, these countries are able to deeply impact a woman’s ability to contribute to a country’s economy in a multitude of roles – e.g., citizen, business professional, mother – and to enhance Quality of Life for the country as a whole.

In this year’s Index, we see a significant increase in Tolerance across all of our top 10 countries from 2014. Tolerance for new ways of thinking, whether political or social, remains critical for redistribution of power. Finland in particular stands out, showing a 10% rise over the past five years, which closely follows on the heels of the Act on Equality between Women and Men that addressed: violence against women, reducing the gender pay gap, promoting female entrepreneurship, raising gender equality awareness in schools, and reducing gender segregation in education and the workforce. Finland shows us that empowering women empowers the nation as a whole.

Women represented in government as well as boardrooms are balanced by men sharing the workload of childcare and housework through generous parental-leave policies as well. The result? A nation of empowered citizens in all facets of life with an impressive display of Quality of Life associations.

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Future focus



Restoring the art of compromise: Responding to extremism today and tomorrow

In our 2014 report, we pointed to the rise of extremism and polarization around economic, social, and religious issues around the world.

As we take stock of the dynamics shaping today and influencing tomorrow, extremism continues to be on the rise while tolerism steadily wanes.

Politics continue to divide countries instead of creating a space for dialogue and compromise. Brexit and its fallout splinters the UK; the gap between Republicans and Democrats in the US does little to show the “art of the deal”; the

Yellow Vest movement in France and rising populism suggest political tension on the horizon; and India’s Prime Minister Narendra Modi plays on populist tensions that will exacerbate the social challenges India continues to face in his next five-year term.

The win-win of politics appears to be a lost art in some countries, but it will need to be resurrected in order for extremism not to win. **Countrymaking requires the power of the collective working together with shared beliefs. Or perhaps just more common ground than achieved today.**

About FutureBrand

FutureBrand is the Creative Future Company. With offices across the world, we unite global experts in strategy, design and innovation to futureproof businesses through brand experiences that drive profitable, long term growth.

Our partners

QRi Consulting is FutureBrand's global research partner for the FutureBrand Country Index. Working in close collaboration, QRi helped to define the research approach against FutureBrand's initial hypothesis, as well as managing recruitment, questionnaire development, and providing in-depth analysis of the qualitative and quantitative data underpinning the report. This is informed by QRi's extensive research, brand and sector knowledge and experience as well as their proprietary QualiQuant methodologies.

FutureBrand has worked with **Weber Shandwick**, who provided additional insight into perceptions of country brands, leveraging the power of social data and visualization. Using advanced analytics techniques to replicate the FutureBrand survey methodology, Weber Shandwick analyzed the social conversation across multiple platforms in ten markets and eight languages.

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