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# **Branding Sweden**

- a comparative study of the national identity, the nation brand identity and the nation brand image

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## Abstract

- Title:** Branding Sweden - a comparative study of the national identity, the nation brand identity and the nation brand image
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- Advisor:** Veronika Tarnovskaya
- Key words:** Nation Branding, National Identity, Nation Brand Identity, Nation Brand Image
- Purpose:** Our purpose is to compare the actual Swedish Identity with how the governmental organizations have chosen to portray it towards foreign tourists, furthermore to compare these two aspects with how foreign tourists perceive Sweden.
- Methodology:** Utilizing a qualitative-methodological approach, this study deploys a hermeneutic phenomenology of folkways. The study is conducted with a abductive approach.
- Theoretical perspectives:** This study presents theories about *Branding, Nation Branding, National Identity, Nation Brand Identity, Nation Brand Image, Nation Brand Equity* and *the Nation Brand Hexagon*.
- Empirical foundations:** The empirical material is gathered from both primary data in form of telephone interviews and secondary data consisting of qualitative and quantitative information.
- Conclusions:** The conclusions of this study are that gaps between the three perspectives that have been studied exist but are relatively small, and can be diminished if worked on.

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The thesis has demanded an extensive amount of work, but for us it has been a very interesting subject to focus on, and the work has been worthwhile. We have learnt a lot, specifically within the field of nation branding, but also about methodological approaches and analyzing large amounts of material. Furthermore, we have developed our ability to multitask, to manage stress, to plan time efficiently and to be critical against our own subjective thinking. We have also developed our English. These knowledges and skills are something we wish to be able to use in the future, within the academia or in a future employment.

The help of some people have further increased the quality of the thesis. We would especially like to thank our mentor Veronika Tarnovskaya, PhD in Corporate Branding, who have helped us to get a deeper insight into the area of branding and have guided us along the way. She has always had the time for us when needed, which we have appreciated.

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## Abbreviations

<b>NBEQ</b>	=	Nation Brand Equity
<b>NBI</b>	=	Nation Brand Index
<b>NSU</b>	=	the Board of Foreign Sweden Promotion Original title: Nämnden för Sverigefrämjande i Utlandet
<b>NUTEK</b>	=	Swedish Business Development Agency
<b>SI</b>	=	Swedish Institute Original title: Svenska Institutet
<b>SCB</b>	=	Central Bureau of Statistics Original title: Statistiska Centralbyrån
<b>TTCR</b>	=	Travel & Tourism Competiveness Report

## Definitions

In the study there are a couple of concepts that will be used, the ways in which these will be used are presented below.

**Nation Branding** – Building, managing and maintaining a nation’s reputation<sup>1</sup>

**National Identity** – What the country stands for, its culture, heritage and people, its real and actual value<sup>2</sup>. We often use the word *actual* when describing the national identity: we here refer to the common view of Sweden as a country.

**Nation Brand Identity** – The core values the people working with nation branding wish to promote<sup>3</sup>. In the thesis we often refer to the portrayed picture or identity.

**Nation Brand Image** – The perceived picture of a nation by foreigners<sup>4</sup>. Here we also use the term the perceived image or picture, which should be regarded as synonymous.

**Stereotype** – “[...] a fixed idea or image that many people have of a particular type or person or thing, but which is often not true in reality”.<sup>5</sup>

**Tourism** – activities of people traveling outside their home environment for a short period<sup>6</sup>

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<sup>1</sup> O’Shaughnessy, J. *et al* (2000) *Treating the nation as a brand: Some neglected issues*

<sup>2</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*

<sup>3</sup> Ibid.

<sup>4</sup> Kotler, P. *et al* (2006) *Marketing Management*

<sup>5</sup> Oxford Advanced Learner’s Dictionary (2000) p 1272

<sup>6</sup> NUTEK (2007) *Tourism and Travel and Tourist Industry in Sweden 2007*

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# 1 Introduction

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*Here we introduce the reader to the study we have chosen by giving a brief background and problem discussion, which leads up to the purpose of the study.*

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## 1.1 Background

According to the Swedish Institute (SI) the world is in a growing globalization era, which makes it shrink in the way that borders between countries diminish. This is an effect of the increasing mobility of people, capital and knowledge.<sup>7</sup> In this globalized society of the world it is important for countries to be noticed on the world market, to be able to reach political goals, attract investment, increase trading and attract tourists. Therefore peoples' interest and trust in a country is very important. This globalization has also decreased the necessity of the geographical place and instead brought up the importance of the mentality of a place. This mentality is referring to a country's values.<sup>8</sup>

The values and mindset that a country stands for is what Simon Anholt mentions when referring to the concept of nation branding. Anholt says that a brand is the perception and reputation about the subject in matter.<sup>9</sup> This goes in line with the definition that SI has of nation branding when stating that it is how a country or nation is being perceived.<sup>10</sup> Anholt also mentions that a country's brand should not be viewed as a product because of its complexity, but even so, people tend to do this comparison.<sup>11</sup> A nation brand is also influenced by everything that is going on in a country, like its social structure, government, trade, investments, media and sports. It is these many different dimensions that give a nation brand its complexity. The most difficult thing when dealing with a strategy of a nation brand is to have a joint spirit of nationalism among the citizens in a country. Anholt also states the importance of a country to have a strong nation brand, to be able to be competitive on the world market.<sup>12</sup>

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<sup>7</sup> The Swedish Institute (2008) *Att sätta Sverige på kartan och skapa relationer med omvärlden*

<sup>8</sup> The Swedish Institute (2005) *Att utveckla bilden av Sverige*

<sup>9</sup> Earthspeak (2005) *Nation brand as context and reputation*

<sup>10</sup> The Swedish Institute (2005) *Nation branding*

<sup>11</sup> Earthspeak (2005) *Nation brand as context and reputation*

<sup>12</sup> Earthspeak (2003) *Elastic Brands*

When the book *Marketing Places: Attracting Investment, Industry, and Tourism to Cities, States and Nations* was published in 1993 it marked the beginning of the evolution of nation branding, but little concern was shown at that time. The Journal of Brand Management came out with a special issue on the subject in 2002, which created a wave of interest and further research.<sup>13</sup> Nation branding is therefore a very new phenomenon, which makes it exciting. There are only a few existing theories but a growing number of nations are using the techniques, which makes it a current subject. It is also a politically controversial theme since the national treasury funds it.<sup>14</sup>

Sweden is one of the many nations that nurture the nation branding of its nation. In Sweden there is an organization called *The Board of Foreign Sweden Promotion* (NSU), which consists of five government-financed organizations. These organizations are *the Swedish Foreign Ministry, the Swedish Export Council, Invest in Sweden Agency, the Swedish Institute* and *Visit Sweden*. The purpose of the NSU is to nurture the nation brand of Sweden by creating an interest, and trust and goodwill for Sweden in other countries.<sup>15</sup> SI believes that if the name or thought of Sweden is directly drawn to a positive association, it will help the Swedish international politics to get their voice heard and to be able to make a difference. Also it will make it easier for Swedish companies to do business and for the Swedish culture to spread overseas.<sup>16</sup> The organization that primarily focuses on the overall picture of the nation branding in Sweden is SI, and the organization that mostly focus its nation branding towards tourism is Visit Sweden.

## 1.2 Problem discussion

In this globalized world the competition for countries to attract investors, tourists, and exports has risen. According to Anholt a strong nation brand can raise a country's voice and make it heard worldwide.<sup>17</sup> As a consequence of this increased globalization, SI believes that it is important to put Sweden on the map and to be competitive, which means to have a well-known and recognized nation brand across the globe.<sup>18</sup>

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<sup>13</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*

<sup>14</sup> Ibid.

<sup>15</sup> The Government Office (2007) *Sverigefrämjande*

<sup>16</sup> The Swedish Institute (2007) *Svenska Institutet – Sätter Sverige på Kartan*

<sup>17</sup> Anholt, S. (2007) *Anholt Nation Brand Index – Q2 Report, 2007 – Special Report*

<sup>18</sup> The Swedish Institute (2008) *Att Sverige på kartan och skapa relationer med omvärlden*

It is important for a country to be aware of its own identity and to portray a rightful picture outwards, and not trying to advertise as many images as possible. A describing quotation of this is “[...] ‘continually repeating the same behavior in the expectation of a different result’.”<sup>19</sup>, which means that it is a country’s past and present behavior that affect a brand image. Anholt mentions that a country is delusional in thinking that it can change the nation brand without changing its behavior<sup>20</sup>, and that “reputation can only be earned”<sup>21</sup>. This is because perceptions are built on how countries portray themselves<sup>22</sup>. People will build up an image of a country based on that country’s nation brand identity, if that one does not correspond with reality, the expectations will not be fulfilled, and a gap will arise<sup>23</sup>.

To measure the awareness and perceptions of a nation brand Anholt developed *the Nation Brand Index* (NBI), which measures peoples’ perceptions concerning different dimensions of a country. These dimensions are *tourism, exports, governance, people, investment and immigration, and culture and heritage*. These dimensions are also the foundation of *the nation brand hexagon*, an instrument used to evaluate the nation brand.<sup>24</sup> In order to get a high ranking on the NBI, it is important to be mentioned in the media in a positive context. A bad reputation could have a bad impact on a country’s nation brand. Anholt mentions that a strong brand gives an advantage because then a negative message will be interpreted in an auspicious way contributed from the positive context; thus, it is important in which context a brand is received.<sup>25</sup>

The first time nation brands were measured with the NBI was in 2005. Only eleven countries participated and Sweden was in the top place. After the first conducted NBI, Sweden lost its top ranking and in the last report finished in 2007 Sweden ended up in ninth place. This is possibly because of the increasing number of participants, as now 35 countries are evaluated.<sup>26</sup> A nation’s ranking number on the NBI compared to other nations is not as significant as the nation’s own hexagon. The hexagon represents the six dimensions of the NBI and gives a country awareness of where it has its weaknesses and strengths. From this instrument the country gets an overview of where future endeavors will be needed. After

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<sup>19</sup> Anholt, A. (2006) *Why brand? Some practical considerations for nation branding* p 6

<sup>20</sup> Anholt, A. (2006) *Why brand? Some practical considerations for nation branding*

<sup>21</sup> Anholt, A. (2005) *Editorial*

<sup>22</sup> *Ibid.*

<sup>23</sup> Govers *et al.*, (2007) *Promoting tourism destination image*

<sup>24</sup> Anholt, A. (2007) *Anholt Nation Brand Index – Q2 Report, 2007 – Special Report*

<sup>25</sup> Anholt, A. (2005) *Editorial*

<sup>26</sup> Håkansson, B. *et al* (2008) *Sverigebylden*

studying the Swedish hexagon, the conclusion is that the country has two weak dimensions, *culture and heritage* and *tourism*.<sup>27</sup> The tourism dimension is, according to Anholt, the most visible way to see a country's nation brand because it has a direct effect on peoples' perceptions of the entirety of a country.<sup>28</sup>

Sweden might still have a high rank on the NBI by being among the top ten nations, but that does not mean Sweden is problem free. While the identity of the nation is changing, the image of Sweden is staying the same. Foreigners have an overall positive view of Sweden, but in some cases it is not the right one or they do not even know about Sweden at all. The old classic image of Sweden is where people are blond, blue-eyed and living in the red cottage in the forest with polar bears on the streets; this is not an up to date picture of Sweden since the population is changing and some information is not even true, "You need to continue to tell and update the story [...]"<sup>29</sup>.

With the economic partners changing and the increasing importance of emerging countries like China, India, Brazil and Russia, there is a need for a rightful reputation. Sweden is a rather unknown nation in these areas of the world and needs to work its way up to recognition. The constant change around the world makes it important for nations to be alert to be able to keep up.

To avoid the risk of a gap between the portrayed identity, perceived image and reality of a nation, and also the risk of having a weak nation brand in a changing environment it is important for the nation to have a good reputation and a positive perceived picture.<sup>30</sup> The Swedish nation brand might be risking possible gaps arising between the national identity, the nation brand identity, and the nation brand image of Sweden because of Sweden's lacking dimension in the hexagon: *tourism* and *culture and heritage*. These inadequacies in the Swedish hexagon are the reason why we want to describe these three aspects of Sweden and analyze if there is a risk of contingent gaps.

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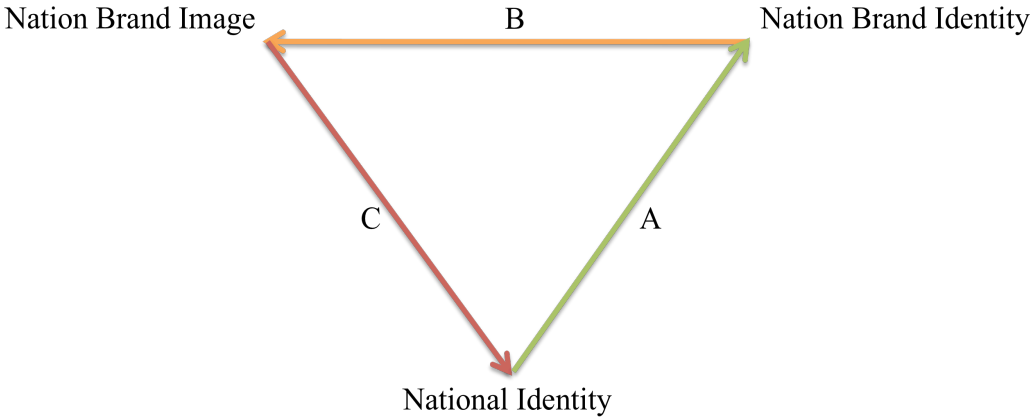
<sup>27</sup> Anholt, A. (2005) *Editoial*

<sup>28</sup> Anholt, A. (2007) *Anholt Nation Brand Index – Q2 Report, 2007 – Special Report*

<sup>29</sup> Sandberg, H. (2007) *Not-so-humble Swedes build a global superbrand* p 28

<sup>30</sup> Dinnie, K. (2008) *Nation Branding. Concepts, Issues, Practice*

We have constructed a figure that describes the three aspects that we want to research, Figure 1. We see the national identity as the base, from where the other two perspectives are created. The figure can be seen as a triangle with a circulation flow. The flow starts at the base from where national identity showcases picture A, which gets interpreted by nation brand identity and then gets portrayed as picture B towards the nation brand image. The nation brand image then perceives picture B that is being sent out, which reflects back on national identity, shown through picture C. When picture C meets picture A, as through a visit to the country, it is then crucial that these two pictures are comparable with each other. Also important, is to remember that the nation brand image is not just controlled by the government's picture being portrayed, but also by the media and word-of-mouth being spread over the world.



**Figure 1: Circulation flow between National Identity, Nation Brand Identity and Nation Brand image.**

**1.2.1 Purpose**

Our purpose is to compare the actual Swedish Identity with how the governmental organizations have chosen to portray it towards foreign tourists, furthermore to compare these two aspects with how foreign tourists perceive Sweden.

## 1.2.2 Limitations

If a nation brand is experiencing a gap between the identity and the image, it is important for the country to take a look at the current brand and to find out in which areas the gaps exist and how they can be fixed.<sup>31</sup> In the Swedish nation brand hexagon, there are two dimensions, *tourism* and *culture and heritage* that are showing a possible gap. According to Anholt these two dimensions are highly related, consequentially, the dimension *culture and heritage* can have an impact on *tourism*. The *people* dimension also affects the *tourism* dimension<sup>32</sup>. Since Sweden's nation brand is lacking in two dimensions we wanted to explore these two, but because of time restrictions and a desire to achieve depth in our study, we chose to focus on only one of them. Since a nation brand's reputation and perception is most visible in the *tourism* dimension it also helped us to limit the study when choosing between the dimensions. Because of the close relationship between the dimensions *tourism*, *culture and heritage*, and *people* the study has also included aspects from other dimensions to help analyzing the view of the tourism section.

A study concentrating on gaps in a country's nation brand towards tourists can take different angles when it comes to the portraying of the nation brand identity, for example in media and different organizations. We have chosen to compare what the Swedish governmental organizations are portraying outwards with how foreigners perceive the nation brand of Sweden, and also with the actual national identity because we see these organizations as the main representatives of a nation brand identity.

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<sup>31</sup> Anholt, A. (2006) *Why brand? Some practical considerations for nation branding*

<sup>32</sup> Ibid.

### 1.3 Outline of the thesis

The way we have chosen to present this study is shown in Figure 2. As the figure shows we started with an *introduction*, laying out the background to why we found the subject interesting and giving a discussion around the problem that we chose to research. Then we chose to present the way we conducted the study in the *methodology* part, so the reader knows how we have done this study to be able to have a critical eye when reading information concerning the study. We then decided to present the *theory* before the empirical material so that the reader has the necessary knowledge regarding the concepts important for the study. Afterwards we presented the information collected by us in our *empirical study* section followed by our *analysis*, where we discussed our empirical material and connected it with the theories that we presented in the theory section. The conclusions that we could draw from the analysis are presented in the *conclusion* section.



**Figure 2: The disposition of the study**



## 2 Methodology

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*In this chapter we discussed the research approaches made and argue for our methodology choices.*

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### 2.1 Research Strategy

When discussing scientific folkways, researchers usually bring up two perspectives - the *positivistic* and *hermeneutic*. A hermeneutic perspective has the sense of an interpreted character, where the understanding of different ways to see reality is of importance. The positivistic perspective, on the other hand, builds on proven facts that are constant over time and predictable, stating that absolute knowledge is the same for everyone.<sup>33</sup> This study is conducted through three perspectives, to be able to see if a possible gap between Sweden's identity, nation brand identity and nation brand image exists. The study is not dealing with absolute knowledge that is constant. Knowledge is something that is changing over time and can be portrayed and perceived differently, it does not stay constant. We had to discard the positivistic perspective and view the study from a hermeneutic perspective. There are also sub-categories to the hermeneutics of folkways, for example *phenomenology*. The phenomenology perspective studies how an object or phenomenon is perceived and which expectations it gives.<sup>34</sup> We found that this sub-category, phenomenology, was inline with what we wanted to research, since we wanted to investigate how the nation brand Sweden is being portrayed and perceived with the national identity to look for a contingent gap. From our collected theories we also found that expectations were important, therefore we came to the conclusion that the hermeneutic phenomenology of folkways suited our study.

When a study is conducting a comparison between two or more perspectives or objects, the study has a *comparative design*. This design is a good method to use when executing a comparison, because it presupposes that by conducting a research from at least two aspects it will give a better insight into the problem being researched. In the comparative design the

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<sup>33</sup> Hartman, J. (2004) *Vetenskapligt tänkande – Från kunskapsteori till metodteori*

<sup>34</sup> Ibid.

study can have a *cross-sectional design* when investigating a socio-cultural environment like value-systems between individuals, groups or nations.<sup>35</sup>

## 2.2 Research Design

When conducting a study the researcher usually chooses between the two methodological perspectives *deductive* and *inductive*, but there is also a third one called *abduction*. Deductive approach is when the researcher's starting position is from theories and these lead to the conclusions. An inductive perspective is when the starting position is from the gathered empirical data, which leads to the conclusions<sup>36</sup>. Abduction is when the researcher changes between the deductive and inductive approaches when conducting the structure of the study.<sup>37</sup> Our starting position was from theories, which built the knowledge ground about national identity, nation branding and how it is connected to identity and image. This helped us to understand what kind of empirical data we needed for the study. The empirical material we collected was analyzed together with the theories and then led to our conclusions. The fact that the study changed between the deductive and inductive approaches gave this study an abductive approach.

## 2.3 Qualitative approach

*Qualitative* and *quantitative* approaches are two methods that the researcher can either combine or choose between in a research study. The qualitative approach is used when the character, nature or quality of a phenomenon or case is being discussed: the meaning is to give a deeper understanding of something.<sup>38</sup> The purpose of this study has to do with the understanding of values and how these are portrayed and perceived, which makes a qualitative approach suitable. The study has although used secondary quantitative data, but interpreted in a qualitative way, this gives the study a qualitative approach.

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<sup>35</sup> Bryman, A. *et al* (2005) *Företagsekonomiska metoder*

<sup>36</sup> Jacobsen, I. D. (2002) *Vad, Hur och Varför? Om metodval i företagsekonomi och andra samhällsvetenskapliga ämnen*

<sup>37</sup> Olsson, H. *et al* (2007) *Forskningsprocessen*

<sup>38</sup> Hartman, J. (2004) *Vetenskapligt tänkande – Från kunskapsteori till metodteori*

When it comes to the research process of the two approaches, it is constructed differently. The qualitative approach uses two processes, the *analytical induction* and the *interactive induction*. The analytical induction process starts with formulating a research question from which three phases consist in order; planning the survey, collecting the empirical material and analyzing the empirical data. The interactive induction is almost the same as the analytical induction; the difference is that by using the interactive induction the researcher changes the research question.<sup>39</sup> After looking at the different research processes, we chose to follow an interactive induction because we changed the research question when needed.

By confirming information through using both primary and secondary data the researcher increases the quality of the study<sup>40</sup>. We chose to gather the empirical material in two different ways, by collecting secondary data from other sources and by primary data from our own conducted interviews.

## 2.4 Choice of Theories

To build a good foundation for our study and make us aware of which angles we needed to explore, we had to find theories relevant for the problem. We started by going back to our purpose and looking at which theories it touched upon.

*“[...] to compare the actual Swedish Identity with how the governmental organizations have chosen to portray it towards foreign tourists, furthermore to compare these two aspects with how foreign tourists perceive Sweden.”*

We gathered our theories before collecting the empirical data because we needed the theories to confirm our thoughts on the subject in order to help us see if there were angles we needed to explore.

From looking at the purpose, we saw three clear theories that needed to be elaborated: *National Identity*, *Nation Brand Identity* and *Nation Brand Image*. These theories helped us to see if the perceived and portrayed picture of Sweden is inline with the actual national identity.

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<sup>39</sup> Hartman, J. (2004) *Vetenskapligt tänkande – Från kunskapsteori till metodteori*

<sup>40</sup> Jacobsen, I. D. (2002) *Vad, Hur och Varför? Om metodval i företagsekonomi och andra samhällsvetenskapliga ämnen*

To get an introduction and basic understanding of these theories we needed to start our theory-section with what *branding* is and then proceed to what *nation branding* is: this is to be able to see how they are related and also how they differ from each other.

Further on the study is a comparative study, which means that we are comparing three different perspectives: the identity and image of the nation brand Sweden with the Swedish identity. This comparison indicates that there might be a risk of a gap if the identity and image does not correspond with each other. This made us focus on theories about gaps between the nation brand identity and nation brand image.

Another important part we included was theories about how nation branding is being evaluated. One instrument that is used in today's society to measure nation brands is Anholt's *Nation Brand Index*, which researches how a nation brand is being perceived. This information helped us collect empirical material about the perceived picture of the nation brand Sweden. We also chose to include information about what tourism is because we have decided to look at our problem through the tourism aspect. Finally, we searched for criticism about the theories concerning nation branding in order to take a critical perspective.

By the choice of our theories, we wanted to gather a broad foundation to use as analytical tools later on in the thesis. We tried to find recent sources, since the area of research is fairly new and in development. We believe that our choices of theories are sufficiently broad and deep.

## **2.5 Collection of Empirical Material**

### **2.5.1 Choice of Governmental Organizations**

When we first started to read about the nation branding of Sweden we found *the Board of Foreign Sweden Promotion* (NSU), which consists of five governmental organizations. We ended up with the two most active organizations on the matter concerning tourism, *SI* and *Visit Sweden*. We chose to give the reader a short overview about SI and Visit Sweden in the empirical section.

### 2.5.1 Document Research

The empirical section does not have to be exclusively primary data collected directly from the source by the researcher, it can also be secondary data, meaning that the researcher looks at information collected and processed by others. Document researches are appropriate when it is not possible to collect primary data, when it is important to understand how other people have interpreted something, or when the researchers need to understand what people have done or said. Documents tend to be quite objective, and, because of the lack of spontaneity, they can also be more carefully prepared.<sup>41</sup> In our study it was difficult for the respondents to dedicate more than 30 minutes of their time for interviews, and we therefore found it valuable to analyze the documents already published by them and by their organizations. The main problem in analyzing secondary data is that the purpose of its publication probably is different from the purpose of the researchers<sup>42</sup>, however we did not see this as an obstacle.

Our document analysis consists of promotional material from the governmental organizations dealing with nation branding towards tourists. The information gathered was, as previously mentioned, both quantitative and qualitative, but the interpretation of the documents has only been qualitative.

We started our collection of information by gathering secondary data about the national identity of Sweden. This was in order to find out what the core values of Sweden are and what makes it unique. We wanted to be able to compare the portrayed and perceived picture with the common view of Sweden. We also decided to interpret statistical data that defines the tourism industry in Sweden. This information helped us to understand the development of tourism in Sweden and how it looked in 2007.

Furthermore, we collected secondary data about the portrayed picture of Sweden, the nation brand identity. This data was found on websites targeting tourists<sup>43</sup>, in promotional material such as films and brochures, in annual reports, and in other publications. The material we used was published during the years 2007 and 2008, and gathered from the two organizations in Sweden mainly dealing with nation branding in Sweden, SI and Visit Sweden.

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<sup>41</sup> Jacobsen, I. D. (2002) *Vad, Hur och Varför? Om metodval i företagsekonomi och andra samhällsvetenskapliga ämnen*

<sup>42</sup> Ibid.

<sup>43</sup> [www.sweden.se](http://www.sweden.se), [www.visitsweden.se](http://www.visitsweden.se) and [www.si.se](http://www.si.se)

The next step was to collect secondary data about how foreigners perceive Sweden, the nation brand image. This data was collected from already made surveys in 2007 conducted by SI and Anholt. Here we could understand if the nation brand identity of Sweden is lacking in one or more areas. The reason for not conducting our own surveys in this matter was the time restriction in combination with the inaccessibility to reach respondents for the surveys in different countries.

### **2.5.2 Interviews**

We decided to take a qualitative approach on the collection of our primary empirical material by conducting interviews. Interviews can be a good research instrument when conducting a qualitative approach, since it gives the researcher the possibility to go in-depth with certain questions. It also gives the opportunity to get emerging answers.<sup>44</sup> This step in our collection of the empirical material gave us the opportunity to ask questions that could fill in the blanks in our secondary data, where we felt information was missing. It also let us confirm the information we found in the secondary data.

There are mainly two ways of conducting a qualitative interview, by doing an *unstructured interview* or a *semi-structured interview*. An unstructured interview is when the interviewer does not necessarily use all the questions and instead lets the respondent reflect freely. A semi-structured interview is an interview with an interview guide with specific questions to be answered; however the answers on the questions are open for free reflections.<sup>45</sup> We chose to conduct semi-structured interviews because of the short time period and we felt it is harder to conduct an unstructured interview over the telephone. We also felt that an interview-guide was preferred so that the interview stayed on track, still we wanted the respondent to be able to speak freely from our questions and have the opportunity for new questions arising during the interviews. The interview guide can be found in Appendix A.

We chose to conduct interviews with Thomas Carlhed, head of the analysis and coordination department at SI, and Bo Söderström, head of the information department at Visit Sweden. The knowledge of these two respondents was important for us because of their positions

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<sup>44</sup> Creswell, W. J. (2003) *Research design Qualitative, Quantitative, and Mixed Methods Approaches*

<sup>45</sup> Bryman, A. et al (2005) *Företagsekonomiska metoder*

within the organizations and information about the portraying of the Swedish identity outwards.

Interviews with open answers can be very time-consuming and a way to decrease the time can be by conducting telephone interviews.<sup>46</sup> We also found in pursuant with Creswell that a telephone interview is preferred when not having a direct access to the person being interviewed.<sup>47</sup> This is the reason why we chose to conduct telephone interviews, as our respondents were located in Stockholm, Sweden while we were in Lund, Sweden; the distance prohibited us from face-to-face interviews. The disadvantage to conducting telephone interviews is of course that the researcher is unable to read the other persons body language and is therefore at risk of stepping over the line when trying to achieve depth in an answer. Also the interviewer can have a hard time ‘judging’ if the other person is lying.<sup>48</sup>

When conducting interviews it can be a good thing to record them to get a better flow in the interview and to not miss anything<sup>49</sup>. We chose to record the interviews to be able to concentrate on the respondents’ answers instead of focusing on taking notes. After the interviews we immediately listened to the recordings several times and wrote the interview down so that we could take out the important parts, and also had the chance to go back and see if we missed anything.

## 2.6 Analysis Methodology

After completing our two interviews with Visit Sweden and SI, and after collecting sufficient secondary data from websites, texts and brochures, we realized we had sufficient information. Our next step was to start to summarize the most important information we had in the empirical section, leaving out unessential details. This was in order to get an overview of the information, to reduce the complexity, and to be able to analyze the information. We continued the process by starting to interpret the data we had collected by using our chosen

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<sup>46</sup> Jacobsen, I. D. (2002) *Vad, Hur och Varför? Om metodval i företagsekonomi och andra samhällsvetenskapliga ämnen*, Dahmström, K. (2000) *Från datainsamling till rapport*

<sup>47</sup> Creswell, W. J. (2003) *Research design Qualitative, Quantitative, and Mixed Methods Approaches*

<sup>48</sup> Jacobsen, I. D. (2002) *Vad, Hur och Varför? Om metodval i företagsekonomi och andra samhällsvetenskapliga ämnen*

<sup>49</sup> Ibid.

theories. The aim was to generalize and to bring an order to all the data we had, but also to provide a deeper comprehension and analysis of the most important insights.<sup>50</sup>

The beginning of the analysis was characterized by a categorization of the empirical material we had gathered. We tried to categorize the information into the different phenomenon *national identity, nation brand identity, and nation brand image*. From the interviews we also found other categories where information could be placed, namely *strategy* and *cooperation*, which is closely related to overall *nation branding*. A categorization is a useful tool because it highlights the similarities, and differences in collected data, some data might treat the same areas or phenomenon<sup>51</sup>. We continued by reading through the theories rigorously in order to take everything into account when analyzing the empirical material.

## 2.7 Choice of Language

The choice of language is important for a study, since it is the way to communicate and spread information and knowledge.<sup>52</sup> This study is structured to reach out to students, teachers and organizations dealing with nation branding in an international perspective, because of the international character we have decided to write this thesis in English. The telephone interviews were conducted in Swedish to simplify the conversation for the respondents. Since there was a risk of translating this information wrong we emailed the translation of the answers to the respondents for them to secure the translation.

The sources of the study are written in different languages and have been interpreted and translated by us, the researchers of this study. The languages used are Swedish, English, French and German. We are aware of our limitations when it comes to German and have therefore kept these sources to a minimum. Swedish is our native language and English is our second language, which we both control fluently and one of us is also fluent in French. We do not think that we have misunderstood or translated any information wrong, however we are well aware of the fact that there might be a risk of an unconscious misinterpretation in the

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<sup>50</sup> Jacobsen, D. I. (2002) *Vad, Hur och Varför? Om metodval i företagsekonomi och andra samhällsvetenskapliga ämnen*

<sup>51</sup> Ibid.

<sup>52</sup> Hultén, P. *et al* (2007) *Kritiskt tänkande*



translation process. To try to avoid this we have made sure that the sources are easy to find for the reader.

## 2.8 Criticism against the study

### 2.8.1 Validation and Reliability

It is important to have a critical attitude towards the way of conducting a study. Jacobsen mentions two variables to consider: *Validation* and *Reliability*.<sup>53</sup>

The validation can be divided into *internal-* and *external validation*. The internal validation deals with whether the study is correct and truthful. Jacobsen mentions that this is hard to prove, and that the way to do this is through having several people claiming it is correct. One way of proving the internal validation is through letting the respondents read the research and see if they agree with what is written or if they recognize themselves; this is also called *face validity*.<sup>54</sup> We had the opportunity to e-mail how we interpreted the respondents' answers back to Söderström and Carlhed, which let us confirm whether we had understood their answers correctly or not and gave us the chance to correct if anything was wrong, this increased the validity of the interpretation.

It is also important to discuss from where the sources have been collected and if sources exist that the researcher did not come across and why. This is to give the reader the awareness of the possibility of missed information. The researcher must also control if the sources are correct, a guideline is to see how close the source is to the phenomenon being investigated. If the source is close to the phenomenon there is a possibility that it is more truthful. The external validation has to do with if the study can be generalized on a larger scale than the study.<sup>55</sup>

The other variable is *reliability*. Here the researcher has to consider in which way the implementation of the method has influenced the results. One thing that might affect the reliability is the *interview effect*. With this the respondent can be influenced by how the

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<sup>53</sup> Jacobsen, I. D. (2002) *Vad, Hur och Varför? Om metodval i företagsekonomi och andra samhällsvetenskapliga ämnen*

<sup>54</sup> Ibid.

<sup>55</sup> Ibid.

interviewer speaks, uses body language, and looks. Since we used telephone interviews, these negative influences are reduced but not excluded. Another risk is that the researcher is neglectful and fails to register certain information from an interview by not writing it down. By recording, filming, or writing down an interview, the researcher helps the reader to see if he or she agrees with the conclusions and to decide if these are correct. Since we chose to record the telephone interviews we strengthened the reliability.<sup>56</sup>

An advantage with using a qualitative approach is that the researcher has the opportunity to use open answers, which increase the internal validation because the respondents define what is the right interpretation- not the researcher. A disadvantage with the qualitative approach is that it is usually very time demanding, which may result in the researcher having to prioritize a few respondents. This can give a problem with the representation of the results and because of this the generalization is limited. The qualitative approach usually has a weak external validation because of the low representation. Another disadvantage is that the researcher is a key instrument in the study, an interview may consist of a lot of information and it is the researcher who decides what he or she brings up in the study. This behavior does not have to be intentional, though the researcher may subconsciously not be aware of it because of his or her personal values. A final disadvantage with this approach is the flexibility because of new information appearing frequently, which can affect the researcher from never finishing the study or changing the way of looking at the problem constantly.<sup>57</sup> This is a problem that we came across several times when collecting the secondary empirical material. We found it hard to limit our self, and needed to remind us of what it was that we were researching.

The external validation is low in one aspect, because the study is focused on a single phenomenon: the nation brand of Sweden. The study shows a high internal validation because it uses open answers in the interviews, and the empirical material we collected from the interviews were sent to the respondents so that they could tell us if we had understood them correctly. We also think that we avoided the interview effect in the way that we did not have a direct contact with the respondents, however, we are aware of the risk that we might have affected the respondents by the choice of language and the way of asking the questions unconsciously.

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<sup>56</sup> Jacobsen, I. D. (2002) *Vad, Hur och Varför? Om metodval i företagsekonomi och andra samhällsvetenskapliga ämnen*

<sup>57</sup> Ibid.

### **2.8.2 Criticism against the Theories**

According to us, the theories regarding nation branding we have chosen are reliable although authors critical against them do exist. Among the theories currently existing are those of Klein and Kahn.

Klein wrote an article strongly questioning the use of nation branding. What she means is that it is impossible for a brand manager to sell a portrait of a nation to the outside world. For instance, take the example of the US, foreigners expected the country to live up to its promises of being a democracy with equal opportunities and liberty, instead they became famous for their wars. Klein argues that the problem does not lie in the brand; it is based in their product - what they are offering.<sup>58</sup>

Khan means that the line between what Anholt says by nation branding and just common sense is too thin. According to Khan, Anholt's definition of nation branding is getting closer and closer to policy innovation, which makes the words of a marketing consultant pointless. For example is Anholt's answer for the solution of the problems of Israel's nation brand to stop fighting against the Palestinians, which according to Khan is a useless advice since it is too evident.<sup>59</sup>

### **2.8.3 Criticism against the empirical data**

Concerning the empirical material, we think there is a risk it might be subjective. This is positive when it comes to the nation brand identity because we wanted the organizations' view on the matter. Some of the information gathered about the nation brand image are from SI and might cause to be biased. We have tried to keep this in mind when conducting our analysis. The empirical material about the national identity was collected from five different sources. Britton was used as a foundation for the section and most information is gathered from his publication. We think this source is reliable even though its date of publication is 2004 because it takes time for a country to change its culture and heritage. We wanted to deepen the section by also including other authors, and chose both statistical data and literature. The study from the World Economic Forum is reliable since it is proven facts

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<sup>58</sup> Klein, N. (2002-03-11) *The Spectacular Failure of Brand USA*

<sup>59</sup> Kahn, J. (2006) *A Brand-New Approach*

collected from partners within the tourism industry, we also think the statistical data of accommodations in Sweden is reliable since it is collected from serious organizations, NUTEK, SCB.

Our interviews were only 30 minutes, which can seem a bit short for an in-depth interview. We therefore tried to always ask why-questions, and also sent the texts that we had written from the interviews to the respondents so that they had the possibility to correct and add if we had misunderstood anything or missed information.

The fact that our empirical material is mostly based on secondary data can be questioned. From the material on nation brand identity, we do not see this as a problem because we want to have the organizations subjective view. However, when it comes to nation brand image the surveys are not conducted for our purpose and even though we tried to keep this in mind we were aware of the problem.

#### **2.8.4 Criticism against the analysis**

When analyzing the empirical material we tried to be as objective as possible. The fact that we were two researchers conducting the same study was positive, since we had the possibility to critically evaluate the other researcher's opinions and discuss the results. This interaction increased the objectivity.

Since we both are Swedish, there is a risk that we could have put subjective values into the analysis of the Swedish Identity. This factor was decreased because of our knowledge about this risk. Throughout the study we have tried to have this in mind, and have tried to approach the problem as not being aware of the actual Swedish Identity by keeping to the collected facts.

We think that a lot of the empirical material has been affected by what we felt was important to bring up in the study: we therefore think it might decrease the reliability. For example we chose which promotional material was important, or which aspects of the websites was to be brought up in the study.

## 3 Theoretical Frameworks

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*Here we present the theoretical frameworks that we used to understand our empirical material and, which helped us with our analysis process. Theories about branding, nation branding, national identity, nation brand identity, nation brand image, nation brand equity, tourism and the nation brand hexagon are included.*

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### 3.1 Branding

According to the American Marketing Association, a brand is “[...] a name, term, sign, symbol, or design, or a combination of them, intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of competition.”<sup>60</sup> Lynch and de Chernatony define a brand as “[...] clusters of functional and emotional values that promise a unique and welcome experience between a buyer and seller”.<sup>61</sup>

The branding of a product or service is mostly done for differentiation purposes. A brand makes the consumers choice easier by augmenting the awareness and the recognition of the product, this also gives a brand a certain responsibility towards its consumers by having to live up to the expectations. Today, when people’s lives are so much more stressful, the decision process has become shorter and therefore the value of a strong brand is becoming more important.<sup>62</sup>

Even if companies use strategies and planning to create brands it is important to remember that “a brand is something that resides in the minds of consumers”, because it reflects the perceptions of consumers.<sup>63</sup> A brand also gives away signals that consumers take in and evaluates. Consumers also take in these signals, when not aware of it.<sup>64</sup>

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<sup>60</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice* p 14

<sup>61</sup> Ibid.

<sup>62</sup> Kotler, P. *et al* (2006) *Marketing Management*

<sup>63</sup> Keller, K. (2008) *Strategic Brand Management: Building, Measuring and Managing Brand Equity* p 10

<sup>64</sup> Solomon, M. *et al* (2006) *Consumer Behaviour. A European Perspective*

## 3.2 Nation Branding

A brand does not have to be exclusively represented through a product and service, people, ideas and places can also be brands. The word *branding* is then used for example in *place branding* and *destination branding*. Place branding is used for branding geographical locations where the brand name usually goes under the name of the city.<sup>65</sup> Destination branding, when discussed in tourism marketing, is defined as “a name, symbol, logo, word, mark or other graphic that both identifies and differentiates the destination; furthermore, it conveys the promise of a memorable travel experience that is uniquely associated with the destination; it also serves to consolidate and reinforce the recollection of pleasurable memories of the destination experience.” according to Ritchie and Ritchie in 1998.<sup>66</sup>

Two other common types of branding are *nation branding* and *country branding*, which definitions usually get mixed up and used as the same, although there is a slight difference. A nation is a large group of people with the same language, ethnical and cultural background while a country is an area occupied with people of a nation, or several nations. Belgium for example consists of a country with two nations, *the Flemish region* and *the Walloon region*. On the other hand, former Germany consisted of one nation but two countries, *West Germany* and *East Germany*.<sup>67</sup> This study will only observe the perspective of nation branding.

It is important to remember that nation branding differs considerably from product branding. Unlike a product a nation is built of people and their appraisals, the consumers will not think about the image of a country, instead they will think about the people living in the nation and their culture.<sup>68</sup> According to Fan a nation can simply not be compared to a product since it has other purposes and audiences, with multiple and vague owners. Therefore strategies for product branding cannot be used in nation branding.<sup>69</sup> O’Shaughnessy *et al* write that consumers’ view of the nation brand consists of beliefs that are based on experience or from the imagery of the people and social, political, and economic conditions at that time.<sup>70</sup>

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<sup>65</sup> Keller, K. (2008) *Strategic Brand Management: Building, Measuring and Managing Brand Equity*

<sup>66</sup> Blain, C. *et al* (2005) *Destination branding: Insights and Practices from Destination Management Organizations*

<sup>67</sup> Fan, Y. (2005) *Branding the nation: What is being branded?*

<sup>68</sup> O’Shaughnessy, J. *et al* (2000) *Treating the nation as a brand: Some neglected issues*

<sup>69</sup> Fan, Y. (2005) *Branding the nation – what is being branded*

<sup>70</sup> O’Shaughnessy, *et al* (2000) *Treating the nation as a brand: Some neglected issues*

According to Fan “Nation branding concerns applying branding and marketing communication techniques to promote a nation’s image.”<sup>71</sup> The usage of branding techniques to promote nations is a fairly new phenomenon, which is said to be a consequence of the current increasing competition in the world. A nation competes to attract investments, tourists, students and immigrants and also to boost exports, other positive outcomes of nation branding is a stability of the currency, investor confidence, international credibility, international political influence, international partnerships.<sup>72</sup>

When it comes to nation branding, it is important to distinguish the concepts of nation brand identity and nation brand image. This is important because it can help nations to see how other audiences perceive them and to guide them to achieve competitive advantages.<sup>73</sup> These advantages are as mentioned above to help nations to increase their export, attract tourists, stimulate investors, get respect and trust, international political influences and credibility<sup>74</sup>.

### **3.2.1 National Identity and Nation Brand Identity**

The *national identity* is what the nation actually is, its culture, landscape, heritage, people and core values.<sup>75</sup> Smith defined the national identity as “a historic territory or homeland; common myths and historical memories; a common, mass public culture; common legal rights and duties for all members; a common economy with territorial mobility for members.”<sup>76</sup> The culture of a nation, which has been described as the most distinguishing element of a country, consists of for example the language, the architecture, sports, music, ethnocentrism and literature.<sup>77</sup> It is important to be aware of the power myths and symbols connected to a nation, since they influence the attitudes towards a nation.<sup>78</sup>

Hofstede created the four different cultural dimensions in order to measure the cultural differences between countries when it comes to the people. In his latest study 74 countries are included and the study is primary based on IBM employees in these countries but also includes pilots, students and service managers. The different dimensions are: *Power Distance*,

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<sup>71</sup> Fan, Y. (2005) *Branding the nation: What is being branded?* p 5

<sup>72</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*

<sup>73</sup> Ibid.

<sup>74</sup> Ibid.

<sup>75</sup> Reynolds in Govers, R. *et al* (2007) *Promoting Tourism Destination Image*

<sup>76</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice* p 113

<sup>77</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*

<sup>78</sup> Ibid.

*Individualism, Masculinity and Uncertainty Avoidance*. In his recent study he has also added a fifth dimension, Long-term Orientation.<sup>79</sup> We chose to exclude this dimension since it is so new and not enough research has been done about it.

The *power distance* dimension is the expectation and acceptance of in equally distributed workload, in organizations, companies and families. A high level of power distance would mean that people expect the society to be unequal and also accept it. *Individualist* countries are countries, which encourage people to pursue their personal goals first and look after their family and themselves to a high extent. A *collectivist* country on the other hand is societies where the belonging to a group means a lot. In collectivist countries the importance of the extended family is very important. Woman's values do not differ that much in different countries, but men's values do. In a *masculine* country there is a big gap between women and men's values, in *feminine* countries the values correspond. A typical feminine country consists of people of both genders being more modest and caring, a masculine country has a gap between the sexes where the men are more competitive and assertive. The *uncertainty avoidance* dimension is about the country's tolerance of uncertainty and ambiguity, how the people in a country feel about new and unknown situations. In countries with a high level of uncertainty avoidance there are many laws and regulations preventing those situations from occurring. An uncertainty accepting country would be a country where there are as few laws as possible where people who are tolerant towards other religions or opinions live.<sup>80</sup>

The *nation brand identity* is founded on the most important factors of the national identity, which is the nation itself. The nation brand identity is what the nation wishes to promote to the outside world. The difficulty is to choose which factors from the national identity that best symbolize the country itself, and how these can be transferable to the different audiences. For example a nation brand identity can bring forth the nations nature, successful companies or strong values<sup>81</sup>

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<sup>79</sup> <http://www.geert-hofstede.com> (2008-05-23)

<sup>80</sup> Ibid.

<sup>81</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*



### 3.2.3 Nation Brand Image

The *nation brand image* is the way consumers perceive the product or service, it is this image that companies need to be aware of and if needed change in order to convince consumers to buy their product or service.<sup>82</sup> When discussing a place or a nation, the image is based on promotion, opinions of others, media reporting and popular culture. When tourists' visit a country the image of the nation will change depending on personal information and experiences.<sup>83</sup> According to Gallarza *et al* the image of a destination is more important than the destination's identity or the reality, the reason for this is to be able to *convince* a person to act to do something e.g. travel to a place.<sup>84</sup>

The consumer's image of a nation will be influenced by the image projected in information space and is based on attributes, functional consequences and psychological characteristics that are associated with a certain destination.<sup>85</sup> Every known nation has an image in the minds of the consumers. The countries that are very unknown might be the most fortunate since they can make the largest impact with the help of branding. Dinnie argues that the nation image is influenced by word-of-mouth, personal experience of a country from visits, stereotypes, national sport teams, political events, how the country is portrayed in media, behavior of the nation's citizens and the perception of goods originating from the country in question. These factors might be more important for a person when forming their image of the nation than the possible advertising campaigns.<sup>86</sup>

For most nations, the brands have been created from history and events, and told to others by the news and mass media. It is important for nations to take control over their branding so that they can make the image more accurate, more up-to-date. Some countries like Sudan need to change their image because people associate it with war and poverty, which might not be the case anymore. Other countries like Switzerland have a positive image but need to change it since cuckoo clocks and chocolate is not their main value and it is not the whole truth about the country.<sup>87</sup>

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<sup>82</sup> Kotler, P. *et al* (2006) *Marketing Management*

<sup>83</sup> Echtner & Ritchie in Govers, R. *et al* (2007) *Promoting Tourism Destination Image*

<sup>84</sup> Gallarza, G.M. *et al* (2002) *Destination Image: Towards a Conceptual Framework*

<sup>85</sup> Govers, R. *et al* (2007) *Promoting Tourism Destination Image*

<sup>86</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*

<sup>87</sup> Cromwell, T. (2008-04-21) *Why nation branding is important for tourism*

### 3.3 Tourism

The most recognized definition of the concept *tourism* when looking in dictionaries and material about tourism is “[...] the activities of persons traveling to and staying in places outside their usual environment for less than a consecutive year for leisure, business or other purpose”<sup>88</sup>. In tourism the importance is who the consumers are, it is important not to mix up the tourists with the natives by focusing on what is being produced. For example there might be only half of the visitors of a hotel contributing to the tourism industry since the other half might be the local population. How many people stay at a hotel does not necessarily tell us how important the tourism and travel industry is.<sup>89</sup> The way to measure tourism in a country is by measuring accommodations: looking at how many nights spent in hotels, holiday villages, youth hostels and camping and also looking at the visitors country of residence.<sup>90</sup>

### 3.4 Nation Brand Equity (NBEQ)

The nation brand equity is defined as “[...] the value imputed to a brand that recognizes its worth as an asset; this value reflects the market share held by the brand, the degree of loyalty and recognition it enjoys, its perceived quality and any other attributes that distinguish it positively from competitive offerings [...]” according to Baker<sup>91</sup>. De Chernatorny and McDonald identify brand equity as “[...] the perceptions consumers have about a brand, and this in turn leads to the value of a brand”<sup>92</sup>. The customer perspective is the customer-based brand equity, which involves the customer’s feelings and thoughts about a brand.<sup>93</sup> The loyalty of consumers shows a clear view of whether a nation brand is successful in its strategy. The aspect of loyalty is discussed as creating an emotional attachment between the consumer and the nation brand, and not by trying to get consumers to repeatedly buy products. This because emotionally attached consumers buy twice as much as regular consumers. A brand’s visual design can give the consumer a positive response and through that increase the brand equity by creating an awareness of the nation brand. Examples of

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<sup>88</sup> NUTEK (2007) *Tourism and Travel and Tourist Industry in Sweden 2007* p 6

<sup>89</sup> NUTEK (2007) *Tourism and Travel and Tourist Industry in Sweden 2007*

<sup>90</sup> NUTEK & SCB (2008) *Accommodations statistics for Sweden 2007*

<sup>91</sup> Dinnie, K. (2008) *Nation Branding. Concepts, Issues, Practice* p 63

<sup>92</sup> Ibid.

<sup>93</sup> Kotler, P. et al (2006) *Marketing Management*

visual design are a nation brand's name, symbols, color scheme and logo.<sup>94</sup> One way of measuring consumer's awareness of a nation brand is through *the nation brand hexagon*.

### 3.4.1 Nation Brand Hexagon

Anholt invented the nation brand hexagon, Figure 3, used for evaluation and classification of different countries as brands. The hexagon rank countries on a scale called *the nation brand index*.<sup>95</sup> The hexagon is an evaluation tool based upon six different areas, *Investment and Immigration, Tourism, People, Culture and Heritage, Governance* and *Exports*. Each quarter of the year, questionnaires are handed out in 35 countries to be filled out by approximately 25 000 people.<sup>96</sup> Consumers are asked about their view of products or services from specific countries, if they would like to buy products from a certain country or not and if they are satisfied with the choice if they already bought something. A country's national products is a valuable promotion tool and is effective when it comes to forming the image of the country in the consumers' minds.<sup>97</sup>

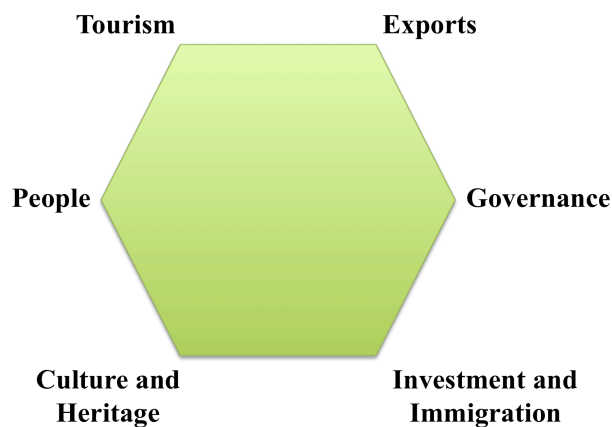


Figure 3: The Nation Brand Hexagon<sup>98</sup>

Tourism is often the most visible part of the nation brand since governments tend to spend most of their budget on tourism advertising; this dimension is also the most showcased area of

<sup>94</sup> Dinnie, K. (2008) *Nation Branding. Concepts, Issues, Practice*

<sup>95</sup> Håkansson, B. et al (2008) *Sverigebilden*, Svenska Institutet

<sup>96</sup> Ibid.

<sup>97</sup> Anholt, S. (2005) *Anholt Nation Brands Index: How does the world see America?*

<sup>98</sup> Anholt, S. (2007) *The Anholt Nation Brand Index – Q2 report, 2007 – Special report*

a nation's brand.<sup>99</sup> Tourism also tends to have a large impact on consumers' view of the nation as a whole.<sup>100</sup> The Governance aspect measures the consumer's view of the nation's domestic and foreign policies, how fair and respectful they manage their country.<sup>101</sup> Investment and Immigration show the willingness of consumers to move to the country in question or to set up a business in the country. It also describes the nation's social and economic situation.<sup>102</sup> Culture and Heritage evaluate consumers' perception of the cultural heritage or the intention to consume the cultural products of a country as films or books or theatres. The consumers are also asked about what kind of cultural activity they expect to find in the country.<sup>103</sup> The factor People is partly based on how the consumers view the nation's people as possible candidates for hiring, and partly as how hostile the nation's people are in the eyes of the consumers. The hospitality is also an important element for tourism.<sup>104</sup>

### 3.5 The gap between Identity and Image

When the nation's identity is not coherent with the consumers' perceived image of the nation, a gap occurs, which is very common. This may create a negative effect on the nation brand. The gap can either consist of a more positive image than the identity or a more negative image than the actual identity. If the image is more negative than the identity, nations may lose potential tourists since they will never travel to the nation. If the image is more positive than the identity, the effect might be as negative since visitors will get disappointed - the brand does not deliver what it promised.<sup>105</sup> It is important to build up customer expectations cohesive with the portrait picture of a service to be able to get a high service quality; this can help attract loyal customers that perceive a rightful picture of the service<sup>106</sup>. When it comes to service quality, there is a common gap arising when an experience does not coincide with the customers' expectations. This gap can lead to a negative quality, a bad reputation, negative effects on the image, and also default business by customers not consuming.<sup>107</sup>

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<sup>99</sup> Ibid.

<sup>100</sup> Håkansson, B. *et al* (2008) *Sverige bilden*, Svenska Institutet

<sup>101</sup> Anholt, S. (2005) *Editorial*

<sup>102</sup> Anholt, S. (2005) *Anholt Nation Brands Index: How does the world see America?*

<sup>103</sup> Anholt, S. (2005) *Editorial*

<sup>104</sup> Ibid.

<sup>105</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*

<sup>106</sup> Grönroos, C. (2002) *Service Management och Marknadsföring – En CRM Ansats*

<sup>107</sup> Ibid.

A consumer's perception of a nation brand might well be influenced by racism or stereotypes. Consumers may also have a complete ignorance or imperfect knowledge about countries other than their own. These negative influences are something that a country needs to prevent. Lack of knowledge is also an issue that has to be brought up when the knowledge is low it is important for nations to enlighten about their existence and values.<sup>108</sup>

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<sup>108</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*

### 3.7 Summary

To make the concepts within nation branding more clear and to provide the reader with the most important theoretical perspectives we chose to write a short summary of the theory chapter. These concepts will be used as analytical tools in the later chapter.

One type of branding is the branding of nations, because of the importance of awareness on the world market; this helps to attract investments and tourists, and to boost exports. It is also valuable because of the international credibility and the international political influence.<sup>109</sup> There are three perspectives important to take into consideration when discussing the nation branding, *National Identity*, *Nation Brand Identity* and *Nation Brand Image*.<sup>110</sup>

The *National Identity* reflects the core values and features of the nation<sup>111</sup>, while the Nation Brand Identity is the wished-for picture being portrayed outwards. The Nation Brand Image is how foreigners perceive the nation brand.<sup>112</sup>

*Tourism* is when people travel outside their home environment for less than a year. It is important to separate foreign and national tourists since they often represent a large part of the tourist statistics, and the promotion we focus on is foreign promotion.<sup>113</sup>

To be able to measure a nation's brand as an asset, research concerning the perception and awareness of the nation brand among consumers has to be conducted, this can be done through looking at the loyalty of tourists and through the nation's *Nation Brand Hexagon*.<sup>114</sup>

There are risks of gaps between the three perspectives when they are not inline with each other. The gap might be a portrayed picture that gives tourist expectations that does not get fulfilled when visiting the nation. The reason can either be, because the nation brand identity is not comported with the national identity or that the consumers' interpretation of the nation brand identity is not comported with the national identity.<sup>115</sup>

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<sup>109</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*

<sup>110</sup> Ibid.

<sup>111</sup> Reynolds in Govers, R. et al (2007) *Promoting Tourism Destination Image*

<sup>112</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*

<sup>113</sup> NUTEK (2007) *Tourism and Travel and Tourist Industry in Sweden 2007*

<sup>114</sup> Dinnie, K. (2008) *Nation Branding, Concepts, Issues, Practice*

<sup>115</sup> Ibid.

## 4 Empirical Data

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*This section gives the reader a short background about SI and Visit Sweden, and presents the collected material on the Swedish Identity, the Nation Brand Identity of Sweden and the Brand Image of Sweden.*

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### 4.1 Swedish Governmental Organizations responsible for Nation Branding

To give the reader an understanding of the organizations working with the nation branding of Sweden, we will provide a background about these organizations.

#### 4.1.1 The Swedish Institute

SI was established in 1945 with the purpose of creating a positive image of Sweden in order to build relations for international collaboration and exchange with other countries.<sup>116</sup> During the period between 1950-2008 the organization increased the spreading of information about Sweden around the globe by publishing material and books translated to other languages. In the early 2000 the official website *www.sweden.se* was introduced, which made it possible to reach more people in the world. SI also started touring the world by having exhibitions about Swedish design and art, for example the *Scandinavia Today* exhibitions. SI also organized festivals about music, films and art. During this time period, SI also developed the spreading of knowledge about Sweden by letting lecturers go abroad on exchange programs and research fellowships. In 2005 SI also added to its purpose to create goodwill and trust for Sweden overseas.<sup>117</sup> For the upcoming years the organization has decided upon some focus areas:

- *Durability* - concerning the environment, development and balance.
- *New creativity* - concerning the experience industry and popular culture.
- *Openness* - concerning equableness, freedom of speech and tolerance.
- *Unlimited development* - concerning technology, culture and science.

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<sup>116</sup> The Swedish Institute (2005) *Historia*

<sup>117</sup> The Swedish Institute (2008) *Six decennier med SI*

SI has also decided to focus geographically, by prioritizing twelve cities around the world. A reason for this is to increase the knowledge about Sweden in countries that have a low awareness about Sweden like countries in Asia. The priority cities are *Tokyo, Shanghai, Beijing, Mumbai, New York, Los Angeles, Washington DC, São Paulo, London, Paris, Berlin and Moscow*.<sup>118</sup>

#### 4.1.2 Visit Sweden

Sweden started to promote its country abroad in 1902 with the help of the tourist traffic union. In 1976 the purpose grew to promote Swedish tourism abroad through planning and coordination, under the name of the *Public Tourist Council*. In 1992 the organization *Swedish Travel & Tourist Council AB* was founded, which was partly owned by the government and partly by the Swedish tourism industry. The name of the organization changed to *Visit Sweden* in 2006.<sup>119</sup> The goals for the organization in 2008 are to augment the attraction for Sweden as a tourist destination, and also to maintain a long-term competitive advantage within the field of tourism in order to get a sustainable growth and employment.<sup>120</sup> Visit Sweden also help foreign journalists who wish to write articles about Swedish tourism or culture with images from their image bank or with information.<sup>121</sup>

Visit Sweden's target group is called *the global traveler*; meaning people that associate Sweden with its beautiful landscape, outdoor activities and the Swedish concern for the environment.<sup>122</sup> This group can be divided in four segments that Visit Sweden think are strong and potentially will grow; *Corporate meeting, Active Family, Wealthy Healthy Older people (WHOPs)* and *Double income no kids. (DINKs)*<sup>123</sup>

The *Corporate Meeting* segment consists of business people and is mostly targeted through the agents and tour operators even though a need also has to be created in the minds of the final consumer. Important sectors in this market are within the drug industry, in the car and IT industries, in banking and insurance but also in the music, fashion and design industries. Recent changes in the market means a stronger demand for time and cost effectiveness and

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<sup>118</sup> The Swedish Institute (2008) *Fokusområden 2007-2010*

<sup>119</sup> Visit Sweden, *Vårt ursprung*

<sup>120</sup> Visit Sweden, *Årsredovisning 2007*

<sup>121</sup> Visit Sweden, *Internationella medier*

<sup>122</sup> Visit Sweden, *Årsredovisning 2007*

<sup>123</sup> [www.visitsweden.com](http://www.visitsweden.com)



the consumers is in need of security and availability. They want to get an exiting supply of adventures and creative arrangements. Sweden is attractive in this target group because of its availability, its extraordinary destinations and activities and also for a very high standard on food and facilities.<sup>124</sup>

*Active Family* is often a European family who values security and the well being of their children and want to spend time with them while on holidays. This group is economically secure and values culture, outdoor life and sport activities. They choose to go to Sweden because of the outdoor life, to see the big cities and experience the local atmosphere.<sup>125</sup>

*WHOPs* are older, healthy couples with their children moved out, this is the generation who are already retired or will retire in a couple of years - generation Baby Boomers. This is a target group who will increase in the upcoming years. They spend a large part of their income on travels, experiences and like to live with some luxury in their everyday life. They are very interested in nature life and culture and like to learn new things. The reasons why they would go to Sweden would be the nature and culture, excursions in the mountains or city breaks, they want to experience the local atmosphere.<sup>126</sup>

The *DINKs* consists of young couples without children who have been raised with travels as a normal part of their lives. They are characterized by a lack of time, which means they value their free time highly. It is important that the destination will deliver what it promised since the group is experienced travelers. These people are individuals who find it important with their own image; they use their choice of destinations in building their own personal image and positioning.<sup>127</sup>

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<sup>124</sup> [www.visitsweden.com](http://www.visitsweden.com)

<sup>125</sup> Ibid.

<sup>126</sup> Ibid.

<sup>127</sup> Ibid.

## 4.2 The Swedish Identity

We will start the empirical presentation of the three perspectives being researched by briefly describing the real Swedish identity, why Sweden is special, based on the culture, the people, the society, the nature and the economy of a nation. It is impossible to describe all the details and history of a country in just a few pages since a country is a very complex phenomenon. Therefore we chose to highlight the most important characteristic values the Swedish identity consists of. We end this section by exhibiting quantitative data about how the actual Swedish identity looks like and the tourism in Sweden.

### 4.2.1 Swedish Culture

Sweden has a rich cultural life, and the diversity and creativity of its people often surprise foreigners. The literature authors are well known beyond the borders of the country, providing bestsellers for an international audience.<sup>128</sup> Sweden is also prosperous within the film industry with famous movie stars and modern film directors.<sup>129</sup> In art Sweden has great national painters, some who are famous for their love of nature life. In the capital of Sweden the modern museum also owns one of the most outstanding international collection of art.<sup>130</sup> Sweden is the world's third largest exporter of music and is often referred to as a "music factory". It is especially the songwriters and producers who gain success and very often they are the people behind famous singers in the world.<sup>131</sup> The most popular sports in Sweden are soccer, athletics and golf<sup>132</sup>. Soccer is one sport in Sweden that is having games played on an international level. Famous promised players are Zlatan Ibrahimovic, Fredrik Ljungberg and Henrik Larson.<sup>133</sup> The modern Swedish design made of simplicity, practicality, light colors and a respect for natural materials have put Sweden on the 3<sup>rd</sup> place on the ranking of major power in product and interior design. This is based on both the innovation of the Swedish company IKEA and the contemporary design, which often comes from Stockholm where international meetings for design takes place. Swedish brands for fashion are also widely known in the international marketplace, for example H&M is a leading Swedish fashion store

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<sup>128</sup> Britton, C. (2004) *Sweden and the Swedes*

<sup>129</sup> Ibid.

<sup>130</sup> Ibid.

<sup>131</sup> Ibid.

<sup>132</sup> <http://www.svenskfotboll.se> (2008-05-22)

<sup>133</sup> <http://en.euro2008-uefa-com> (2008-05-22)

around the world. Nowadays it is also common to use Swedish traditional handicraft in interior design and fashion, especially the dala kurbits style used on the dala horse.<sup>134</sup> The food traditions of Sweden are now changing because of immigration and influences from other parts of the world. The basic Swedish food for example meatballs, stuffed cabbage rolls and pickled herring is now getting mixed with international food, which makes it unique.<sup>135</sup>

#### 4.2.2 Swedish Nature

In Sweden there are 9 million inhabitants living on an area as big as Spain or France, which makes it very sparsely populated. 90% of the people live in the southern part of the country and the Arctic Circle intersect the northern part.<sup>136</sup> Most of Sweden's people live in the cities or close by.<sup>137</sup> More than half of Sweden contains of forest, 16% of mountains, and 10% of water. The nature is everywhere and available to everyone. The contrast between north and south is large since it is such a long country; from the forests in the north, the mountains on the border to Norway, to the limestone islands of Gotland and Öland, and finally large plains and beaches in the southern region of Skåne. The Gulf Stream prevents the climate from being very harsh and gives Sweden a mild climate all year round.<sup>138</sup> Sweden is a country with a lot of rainfall and wind; Skåne is the windiest part of Sweden. Sweden also has some warm temperatures with an average temperature around 18 centigrade.<sup>139</sup> The water temperature in Skåne is approximately 17° in the summertime.<sup>140</sup> The changes of the seasons are radical and every Swede values the nature highly. This love of the nature transformed at a very early stage to the Swedish concern for the environment. Sweden was already in the 1970's one of the leading countries on the international arena preventing global warming and implementing policies in their own country. The last 20 years of efforts has among other things made the water in central parts of Stockholm possible to swim and fish in.<sup>141</sup> The lightness and darkness of the Swedish seasons are somewhat extraordinary. One of the most popular tourist attractions is the Northern Lights in the north, but foreigners are amazed by the midnight sun in the summers and the dark days during winter. Sweden is a home for some wild animals only existing in this part of the world, for example the elk, the wolverine, the wolf, the brown

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<sup>134</sup> Britton, C. (2004) *Sweden and the Swedes*

<sup>135</sup> Ibid.

<sup>136</sup> Ibid.

<sup>137</sup> SCB (2004-04-21) *Rutkarta över Sveriges Befolkning*

<sup>138</sup> Britton, C. (2004) *Sweden and the Swedes*

<sup>139</sup> SMHI (2007-07-10) *Sveriges klimat*

<sup>140</sup> <http://badplatsen.smittskyddsinstitutet.se/> (2008-05-28)

<sup>141</sup> Britton, C. (2004) *Sweden and the Swedes*

bear and the lynx.<sup>142</sup> In Sweden people have *the right of public access* also called *the right to roam*, which means that people are allowed to move around almost everywhere in the nature as long as they do not disturb or destroy anything.<sup>143</sup>

### 4.2.3 Swedish Society

The Social Democrats came to power for the first time in the 1920's and developed what was called the "third way" a mix between socialism and capitalism, also referred to as "the Swedish model". The goal was to create a welfare state by high taxes and a developed social welfare system, this to secure the country's citizens in areas like health and economic issues.<sup>144</sup>

The Swedish Royal Family has only a symbolic power and official and ceremonial functions, although they have a strong support among Swedes. Sweden has succession to the throne regardless of gender, which means that Princess Victoria soon will inherit the throne and become the next Queen.<sup>145</sup>

The Swedish democratic tradition is very strong and since women gained the right to vote, equality between the sexes has improved tremendously. 74% of the women are involved in the labor market compared to 79% of the men and there are many laws and policies aiming to develop the equality even more. There are also policies and laws preventing discrimination of groups in society such as people with other ethnical background, disabilities or children.<sup>146</sup>

Sweden is a military neutral country that also applies neutrality in its foreign affairs, and there has not been any war in Sweden since the 19<sup>th</sup> century. Also, Sweden is very active in international peace efforts, for example Sweden is a member of both the UN and the EU.<sup>147</sup>

Sweden is probably one of the most secularized countries in the world. Although 80% of the inhabitants belong to the Church of Sweden, which is Lutheran, consequently, most people only go to church on ceremonial occasions, like baptisms, confirmations and weddings. About

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<sup>142</sup> Britton, C. (2004) *Sweden and the Swedes*

<sup>143</sup> Unknown (2008-05-27) *Allemansrätten en förutsättning för friluftslivet*,

<sup>144</sup> Britton, C. (2004) *Sweden and the Swedes*

<sup>145</sup> Ibid.

<sup>146</sup> Ibid.

<sup>147</sup> Ibid.

15% of the population in Sweden has foreign origins, which means that Sweden has one of the highest immigrant densities in Europe. This makes Sweden a very multicultural country.<sup>148</sup>

#### **4.2.4 Swedish People**

The Swedish people celebrate the change of the seasons and the love of nature. Lucia, Christmas, Walpurgis, Midsummer and the Crayfish parties are all defined by this celebration of a season and welcoming of a new one. The Swedish people are special in the way that they are modern in the same time, as they love the nature and rural life.<sup>149</sup>

Sweden is also populated by 15 000 Samis, the native Scandinavians also residing in Norway, Finland and Russia. The Sami culture differs strongly from the Swedish one, and is based on reindeer breeding, the Sami language, the Sami mythology and the Sami art handicraft.<sup>150</sup>

Sweden is a very individualistic country meaning that personal goals are more valuable than the goals of the group or society. It is a feminine country with a low amount of power distance, and an uncertainty accepting country. This means that the values and goals in life of the men are similar to the ones of woman, and that the people are easily accepting other cultures, religions and also change and new environments. The low amount of power distance significate the in acceptance of inequality in society and in the workplace, Swedish people are not fond of hierarchies. In comparison to the other countries in Scandinavia, the people are a bit more feminine in the way they think, but less uncertainty avoiding.<sup>151</sup>

#### **4.2.5 Travel & Tourism Competiveness Report**

The World Economic Forum together with partners in the tourism and travel business has compiled a *Travel & Tourism Competiveness Report 2007* (TTCR), which covers 130 countries around the world concerning tourism. The research covers different aspects connected to the tourism industry, Appendix B.<sup>152</sup>

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<sup>148</sup> Britton, C. (2004) *Sweden and the Swedes*

<sup>149</sup> Ibid.

<sup>150</sup> Ibid.

<sup>151</sup> <http://www.geert-hofstede.com> (2008-05-23)

<sup>152</sup> World Economic Forum (2008) *the Travel & Tourist Competiveness Report 2008*

*Environmental sustainability* – For a country to be attractive the environment and regulations concerning this are very important. Therefore the TTCR measures the carbon dioxide emissions and the enforcement of environmental regulations. Sweden ranks high here and this is a category that gives Sweden an advantage concerning regulation and responsibility, although Sweden ranks low when it comes to the carbon dioxide emissions.<sup>153</sup>

*Safety and security* – The country has to be safe for tourists to travel to it. The report looks for example at a country's crime rate and if the police are reliable and protecting. Sweden has a disadvantage in this category according to this survey; the country does not have a reliable police force or response to road accidents.<sup>154</sup>

*Health and Hygiene* – A country's ability to care for foreigners concerning medical care and clean water are important for the tourism sector. This section is measured on the quantity of hospital beds and doctors, and how clean the water is. Here Sweden are ranked number one when it comes to clean water and sanitation issues, however the country ranks low on the quantity of hospital beds.<sup>155</sup>

*Prioritization of tourism & travel* – In order for the tourism and travel industry to get funding and future investments it is necessary to make clear the Tourism & Travel section is primary concern. This can be measured by looking how often the country attends international fairs about Tourism & Travel, and through observing if the country has a high quality in their campaigns. Sweden ranks really low here, and the survey shows that this is a huge disadvantage to Sweden. The country does not prioritize the tourism financially or through advertising.<sup>156</sup>

*Ground transport infrastructure* – The quality of the roads and highways in Sweden are high, so is the quality of the transportation by train or by car.<sup>157</sup>

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<sup>153</sup> World Economic Forum (2008) *the Travel & Tourist Competiveness Report 2008*

<sup>154</sup> Ibid.

<sup>155</sup> Ibid.

<sup>156</sup> Ibid.

<sup>157</sup> Ibid.

*Tourism infrastructure* – The tourism infrastructure takes into account the quantity of hotel rooms, car-rental shops and ATMs. This is said to be a disadvantage to Sweden, concerning quantitative of ATMs, hotels and car rental companies.<sup>158</sup>

*Price competitiveness in the T&T industry* – For tourists the price on goods and services are important and therefore the TTCR research how more or less a country's prices are in for example fuel and accommodations. Sweden is an expensive country in comparison with other countries because of the taxation, fuel and hotel nights are expensive and Sweden rank low here.<sup>159</sup>

*Affinity for Travel & Tourism* – This measures to what extent the country and its society is opened for foreign visitors. Here the TTCR for example measures the attitude among the population towards foreign tourists. According to the survey this category is also a disadvantage to Sweden, although Sweden rank at number 20 of 130 concerning Swedes attitude to foreigners.<sup>160</sup>

*Natural resources* – The access to nature is important to have a competitive advantage according to the TTCR. Here the report measures the quality of the nature, the fauna, quantity of animals and protected areas. Sweden ranks in the top ten when it comes to the quality of the Swedish environment.<sup>161</sup>

*Cultural resources* – To this section the TTCR measures the quantity of stadium seats, cultural heritage, international fairs and exhibitions. Sweden is ranked in place 15 when it comes to attending world exhibitions, and is seen as a disadvantage in this survey.<sup>162</sup>

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<sup>158</sup> World Economic Forum (2008) *the Travel & Tourist Competiveness Report 2008*

<sup>159</sup> Ibid.

<sup>160</sup> Ibid.

<sup>161</sup> Ibid.

<sup>162</sup> Ibid.

#### 4.2.6 Overnights at Swedish Hotels, Holiday Villages, Youth Hostels & Camping

Statistic data over accommodations, meaning how many nights are spent in a country are used to measure a country's tourism. Statistics over how many nights are spent in Swedish *Hotels, Holiday Villages, Youth Hostels* and *Camping* are gathered from *the Swedish Business Development Agency (NUTEK)* and *the Central Bureau of Statistics* in Sweden (SCB). The statistic information we found concerning Sweden and the nations tourism are shown in the Appendices C-E.<sup>163</sup>

Appendix C tells us that the total amount of overnights in Sweden 2007 was 48,6 million overnight stays. Approximately 77% of these overnights were spent by Swedes,  $\approx$  9% of the overnights were spent by Sweden's Scandinavian neighbors,  $\approx$  11% were spent by visitors from Europe with the exception of the Scandinavian countries and the rest of the world stood for around 3% of the overnights in Sweden. The table also shows that hotels are more favorable among foreign visitors, and that Camping is in second place. Camping were however the most popular in the Scandinavian countries mostly by Norway and Germany represents the majority of camping in Europe. Outside of Europe camping seems to be very unpopular.<sup>164</sup>

Appendix D shows how nights spent in Sweden have developed between the year 1998 and 2007 and Appendix E shows how these overnights have increased or decreased over the same period of time. These Appendices C-E tells us that Sweden have had steady increase overall between 1998 and 2007, except for the years 2000 and 2004. Between 2006 and 2007 tourism had increased by + 2.26 %. Appendix E, in particular, shows that the increase in 2007 has been low compared to the other years in Europe has a whole, although outside of Europe we can see a steady growth of foreign visitors staying in Sweden.<sup>165</sup>

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<sup>163</sup> NUTEK & SCB (2008) *Accommodations statistics for Sweden 2007*

<sup>164</sup> Ibid.

<sup>165</sup> Ibid.



### 4.3 Nation Brand Identity

The governmental organizations have chosen some core values from the Swedish national identity to promote to the outside world. We have studied how these organizations portray Sweden.

#### 4.3.1 Nation Brand Identity According to the Swedish Institute

When it comes to nation branding, SI find it important to work with spreading knowledge and awareness about Sweden internationally, this to increase Sweden's goodwill. SI finds the communication to be an important factor when working with increasing the world's perception of Sweden and giving the world a positive perception.<sup>166</sup>

Sweden does not have a goodwill problem according to SI. Sweden's goodwill is built on values that stand out in the world and the country's way of dealing with environmental issues and being a responsible and friendly, progressive people. The environmental problem in the world is also an ongoing trend that Sweden has chosen to work on by holding on to good values and being a country that acts right when it comes to a sustainable development. Some of Sweden's values that are ahead of the rest of the world are the country's take on equality and children's rights. Sweden also has some negative associations to the country, like a cold dark country in the peripheral side of the world. Carlhed also mentions that the expectations that people have of Sweden usually get satisfied and beyond when they visit the country or come to work or study here. Carlhed also says that a good promoter for Sweden and its goodwill is the company IKEA, which reaches out to a lot of people around the world while showcasing the presence of Sweden and its culture. IKEA is a company that gives Sweden awareness, trust and goodwill abroad.<sup>167</sup>

SI portray Sweden as a country with a cultural heritage, outdoor life and Sweden as a winter destination. SI describe Swedish design, specifically highlighting what to buy and where, and portrays the modernity and luxury of some new hotels in Sweden and shows openness towards gays. They also inform about cruising opportunities around Sweden.<sup>168</sup> SI has put a

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<sup>166</sup> Carlhed, T (2008-05-22) the Swedish Institute

<sup>167</sup> Ibid.

<sup>168</sup> Visit Sweden (2008) Sweden 2008, U.S.; *Sweden 2008, UK; Suède 2008; Schweden 2008*

lot of focus on the three largest towns in Sweden: *Stockholm*, *Gothenburg* and *Malmö*, focusing on the cities' main attractions and about what they have to offer. They are generally described as modern, cosmopolitan and vibrant, with many events. SI portrays that food and shopping are affordable and price worthy in Sweden.<sup>169</sup>

On Sweden.se SI focus on portraying the picture of Sweden by showing varied nature, Swedish people. The urban cities and culture life are shown through the films “Sweden – the Northern Attraction” and “Open Skies, Open Minds”. The films show many esthetically attractive and thin, blond people with blue eyes in contrast to only nine people with foreign origins, and only very few people with brown hair. They portray blond women running around in the nature, swimming, laughing, with their hair waving in the wind. SI also portrays the celebration of the midsummer season. Furthermore, SI portrays the equal values existing in Sweden by showing women in high positions in organizations and also in work places that are considered more masculine, like the car industry.

The fact that Sweden is an innovative country and focuses on technology is portrayed through SI by having an online community called *the Community of Sweden*. The embassy of Sweden was also one of the first to be established in *Second Life*, and is active writing several blogs concerning Sweden in cooperation with Visit Sweden.<sup>170</sup> The centre of gravity in SI's portrayed picture is on the nature life mixed with the urban modernity in form of design and creativity. SI brings forth that the wilderness of Sweden is enormous and unique, and describes the urban centers, which differs tremendously from the rural parts in the north.<sup>171</sup> SI also describes the Swedish mountains as cheaper than the European Alps with shorter lift lines and that it is possible to swim in Skåne from early June until September. SI portrays different pictures to different countries, for example towards the UK, French and German audience SI portrays pictures of activities for children and about the Swedish food culture, which is not portrayed towards the United States, and to French people SI adds information about fishing opportunities.<sup>172</sup>

According to SI, Sweden has an awareness problem. Sweden's awareness problem has to do with geographical and cultural differences and distances. Although Sweden is a country well

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<sup>169</sup> Visit Sweden (2008) Sweden 2008, U.S.; *Sweden 2008, UK; Suède 2008; Schweden 2008*

<sup>170</sup> [www.communityofsweden.se](http://www.communityofsweden.se), [www.sweden.se](http://www.sweden.se), <http://vdblogg.visitsweden.com>

<sup>171</sup> Visit Sweden (2008) Sweden 2008, U.S.; *Sweden 2008, UK; Suède 2008; Schweden 2008*

<sup>172</sup> Ibid.

known in countries geographically or culturally close to Sweden, countries in Europe and to some extent in North America and Latin America, continents that are further away from Sweden has a lower awareness of Sweden, for example Asia, Africa and South America. Carlhed at SI says that the message Sweden sends out takes a long time to reach some places because of the distance and that creates a backlog of communications with some countries.<sup>173</sup>

Carlhed mentioned that associations still existing in some countries are the blond people, free sex, the music group Abba and depressing movies. It is therefore important for Sweden to build relations and networking that will be consistent year after year, this to create an investment that will pay off in awareness and goodwill over years to come. One way for Sweden to increase its awareness around the world is promoting its action on sustainable development and highlighting its work with the environment. These values have already raised the awareness of Sweden, and hopefully it will continue. SI is already planning meetings and exhibitions on this subject, both as a part of EU and as a way to promote Sweden abroad. The low awareness in Asia has also made SI to focus more on that continent to be able to increase the Swedish awareness over there, for example they started to establish connections in China and Japan. SI also wants to establish networking with India where Sweden has the lowest awareness according to the nation brand hexagon.<sup>174</sup>

Carlhed does not think there is a specific gap between the portrayed and perceived picture of Sweden, he says that well educated people and people that have visited, studied or worked in Sweden are well aware of Sweden's identity. However he mentions that where Sweden's awareness and goodwill is low, the picture of Sweden is vague and built on stereotypes.<sup>175</sup>

Sweden is also well connected with the other countries in Scandinavia because they are similar culturally, geographically and nature wise, the countries' messages and portrayed pictures are similar. Carlhed does not see this closeness as a disadvantage, more as an advantage because it gives a clearer picture and gives a stronger power when reaching out to the people/consumers. Also Sweden is the country in Scandinavia that is the most well known

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<sup>173</sup> Carlhed, T (2008-05-22) The Swedish Institute

<sup>174</sup> Ibid.

<sup>175</sup> Ibid.

and also the country that is the most connected to Scandinavia. The picture here is also a positive one of Sweden.<sup>176</sup>

#### **4.3.2 Nation Brand Identity According to Visit Sweden**

Visit Sweden has chosen to portray Sweden as a progressive country. All communication is meant to be based on the four main values *openness, innovation, authenticity* and *consideration*. These four values are the foundation of Visit Sweden's identity of Sweden. Sweden may not have a cultural heritage as rich as Italy or France but Söderström from Visit Sweden argues that the nature works as a cultural heritage and is the main strength, and also the countryside and rich and varied nature life. The proximity of the bigger cities with the nature life is unique; it is possible to combine vacations of both kinds without any problems. In Sweden tourists can have extraordinary experiences with the nature. The Swedish people are open-minded with particular language skills, they are eager to show and promote their country. The weaknesses of the Swedish population are that they are not all aware of how exotic Sweden is and therefore they do not promote it as much as they could.<sup>177</sup>

Visit Sweden means that nation branding has opened up an opportunity to differentiate against other countries, mainly the other Nordic countries. When defining the nation as a brand it becomes possible to measure it, which is very valuable. Nation branding is mainly used in countries further away than the immediate neighboring countries since they already know a lot about Sweden. In some countries the purpose is to promote tourism, in other countries the knowledge about Sweden is so poor that the main purpose has to be to create a basic knowledge in the minds of the consumers before concentrating on the tourism part. The tourism aspect of nation branding is important since it often is the first experience of the nation brand, after visiting the country the tourist has a larger incentive to buy products from the country in question or have a conference there.<sup>178</sup>

The reason why Sweden spends less money on tourism than other countries is evident, because of the country's extensive tradition of industrialization, the forest and the ore are the main source of income and the tourism is less important. In Denmark and Finland they are

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<sup>176</sup> Carlhed, T (2008-05-22) the Swedish Institute

<sup>177</sup> Söderström, B (2008-05-17) Visit Sweden

<sup>178</sup> Ibid.

more dependent on tourism as an income. Even though the other Scandinavian countries are seen as the main competitors except from New Zealand and Canada they are trying to cooperate. In Asia they own a company together with Norway and Denmark and in New York they share the same office. In places where the knowledge about Scandinavia is so poor it is better to cooperate. Every fourth year there is a world exhibition about countries and Visit Sweden is now preparing for the 2010 Shanghai exhibition where they wish to enhance the awareness of Sweden as a tourism destination.<sup>179</sup>

The weakness in the positioning of Sweden is the location, for some tourists Sweden is too far to travel. Previously the harsh climate was also a weakness but is now changing and becoming an advantage. With global warming typical tourist destinations in southern Europe become too hot and people prefer the mild climate in the north. Visit Sweden reviews their positioning and their portraying outwards approximately each year. Söderström believes that the picture has changed to become more modern in the last ten years.<sup>180</sup>

Their target groups are based on rigorous marketing surveys and competitor analysis, done three years ago. They are thought to increase in the future because of the retiring of the baby boomers, 50 million people in Europe will retire soon and will have the time and money to spend on holidays. A larger budget would not change the target groups or target markets; they believe it would just increase the current campaigns for existing groups and markets. When asked about backpackers traveling on a budget, Söderström said that in time this group will become a part of the DINKs. They target both first time visitors and loyal visitors. Visit Sweden also think that Sweden is an affordable country, in comparison to other European countries for their specific target groups. It was worse before but now the situation has changed with the weak Swedish krona.<sup>181</sup>

The expectations Visit Sweden think the consumers have before coming to Sweden is the belief of an exotic country where they can experience nature and culture and also design. People who have been traveling a lot in the past will think Sweden is an interesting destination when they become tired of typical destinations as London or Paris.<sup>182</sup>

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<sup>179</sup> Söderström, B (2008-05-17) Visit Sweden

<sup>180</sup> Ibid.

<sup>181</sup> Ibid.

<sup>182</sup> Ibid.

The image of Sweden is not positive in all countries, mainly in large parts of Asia and Africa. Visit Sweden do not keep this in mind, they market the nation brand in the target countries exclusively. If there are stereotypes and reputation about Sweden, they are mainly positive. Sweden is rarely portrayed in a bad way in foreign media, it is mentioned as a successful and hip country and especially the design is written about in articles.<sup>183</sup>

The future of the nation brand and possible tourists visiting is very dependent on the oil price and the global warming. Tourists might demand more sustainable tourism experiences and might be ready to pay more for their holidays. In general the consumers will become more conscious about where they go. A problem in this is Sweden's location since most visitors need to take a flight, which is more challenging for the environment than the train. Although the visitor can compensate for the flight upon arrival since there are many environmental friendly alternatives when it comes to accommodation and excursions. Another important trend Visit Sweden already sees is the short break trips, European visitors who visit a bigger city for less than a week.<sup>184</sup>

The content Visit Sweden is promoting has not changed because of the larger amounts of immigrants to Sweden and the Sami people's culture and history is not promoted separately but in the whole package of the Swedish nation brand. In some promotional material such as the Sweden film and in the image bank, which can be found on Sweden.se they have made the effort of also including people with other ethnical background and Sami people for visitors to understand the variety of the Swedish population.<sup>185</sup>

Visit Sweden are working with the local tourism organizations such as the Stockholm Visitors Board to secure that they share the same nation brand identity to promote. They are not cooperating with the local tourist offices. If there would be a gap in the consumers' view of Sweden and the actual national identity, Visit Sweden believes it is on the positive side; the visitors might have too high expectations. In preventing this, they are trying to improve the work of the local tourism destinations so that the expectations are being fulfilled instead of changing the image to a more accurate one.<sup>186</sup>

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<sup>183</sup> Söderström, B (2008-05-17) Visit Sweden

<sup>184</sup> Ibid.

<sup>185</sup> Ibid.

<sup>186</sup> Ibid.

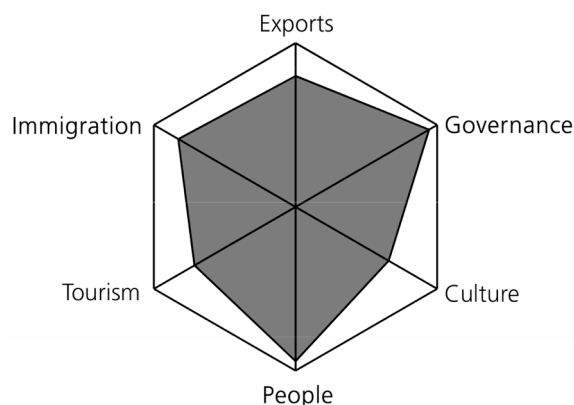
## 4.4 Nation Brand Image; The Consumers' view of Sweden

*“When we Swedes travel elsewhere in the world, we often meet people who at first seem to have no concept of our country at all. After a while, however, it usually emerges that they actually have a few, but very firm convictions. Generally speaking, they are the same old mythical images of Sweden: a crypto-communist country populated by polar bears, dumb but willing blondes and melancholy, hard-drinking suicides. It seems as if these clichés have a life of their own.”*<sup>187</sup>

From a study conducted by SI, the picture of Sweden is said to be overall positive, but with a lack of recognition and knowledge about the country. Sweden is a small country that has a hard time reaching out and this is shown by the different perceived picture of the Sweden in different parts of the world as can be seen in figure 3. Sweden is usually associated with *high quality for life, welfare, education, tolerance, openness and equality*.<sup>188</sup>

### 4.4.1 The Nation Brand Hexagon of Sweden

In the last measurement done Q4 2007, Sweden was ranked on the ninth place out of the 35 countries included in the survey. Overall, Sweden was ranked the highest in the dimension of Governance but the lowest in Tourism and Culture and Heritage, Figure 4.<sup>189</sup> The ranking in the sub-categories of the different dimensions are as follows:



**Figure 4: The Swedish hexagon**<sup>190</sup>

<sup>187</sup> Britton, C. (2004) *Sweden and the Swedes* p 28

<sup>188</sup> The Swedish Institute (2008) *Sverigebild* 08

<sup>189</sup> Håkansson, B. *et al* (2008) the Swedish Institute, *Sverigebild*

<sup>190</sup> The Swedish Institute (2008) *Sverigebild* 08

- Culture and heritage – Overall this section got the number 13 in ranking, and number 18 concerning a rich cultural heritage. Place 13 in excelling in sports, and number 10 in being an exciting and interesting place concerning films, literature and art. The cultural activity which people thought would most likely be produced in Sweden is classic sculptures and museums.<sup>191</sup>
- Tourism – Overall 11 in ranking. Respondents to the survey answered that Sweden was the ninth place in contrast to the other countries being researched that they would visit if money were not an obstacle. Sweden ranked 9 in being rich on natural beauty and number 19 in rich on built heritage and cultural heritage. The three adjectives that best described the experience from visiting Sweden, was: *fascinating*, *exciting* and *predictable*.<sup>192</sup>
- People – Overall 3 in ranking. The respondents ranked Sweden at number 6 when answering if the people of the country would make the visitors feel very welcome. Sweden also got a number 6 on respondents answering if they would like to have a Swede as a close friend. The country also got a 6 ranking when asked about whether the respondent would consider hiring a Swede for an important position in an organization. Adjectives that describe the Swedes are: *reliable*, *hard working*, *intelligent* and *honest*, *not uncongenial*, *not violent* and *not particularly fun*.<sup>193</sup>

The perception of Sweden differs very much from country to country. Figure 5 shows a couple of different views of Sweden by consumers in different countries like India, France and Russia. In the figure we see that Indian consumers have the worst perceived picture of Sweden when it comes to tourism and culture and heritage, followed by UK, Brazil, France, Japan and China. USA, Russia and Germany seems to have a better-perceived picture of Sweden, but still not perfect and also needs approving in the tourism and culture and heritage dimensions.<sup>194</sup>

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<sup>191</sup> The Swedish Institute (2008) *Sverigebild* 08

<sup>192</sup> Ibid.

<sup>193</sup> Ibid.

<sup>194</sup> Håkansson, B. *et al.* (2008) *Sverigebild*



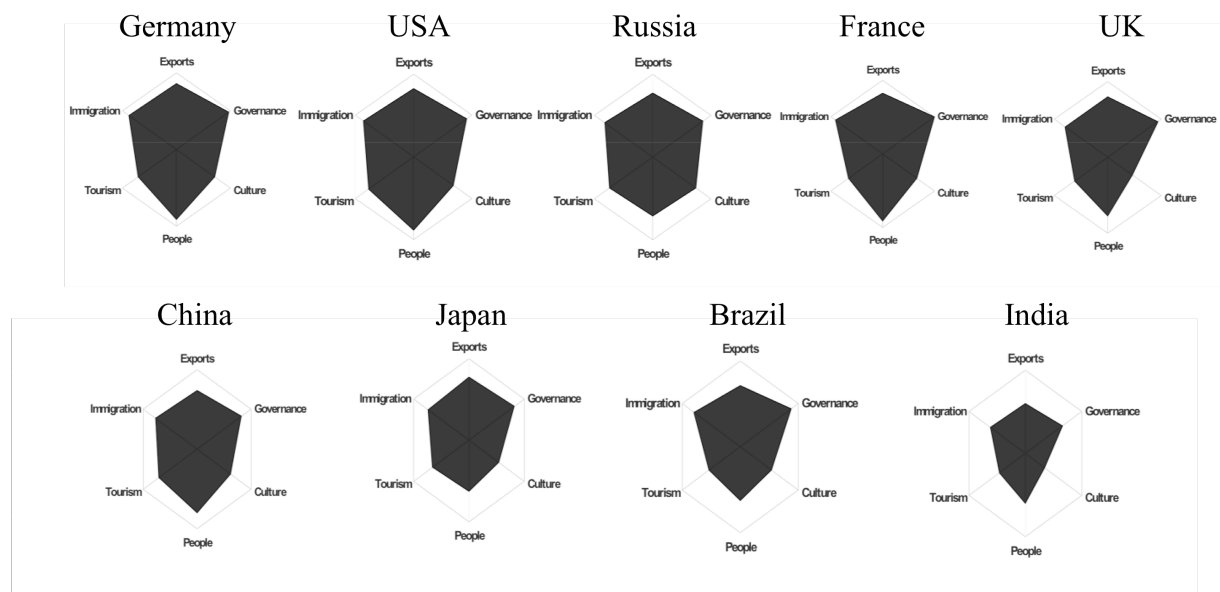


Figure 5: Perceptions on Sweden from countries around the world, seen through Anholt's hexagon.<sup>195</sup>

#### 4.4.2 Future Risks of the Nation Brand Image

The tourists visiting Sweden will be affected by the approaching economic downturn, it will generally affect all tourism. Another factor is the increase of the oil price, which will lead to an increase of the price of transportation, the flight tickets will increase and so will the price for driving around in cars. Many national tourists characterize the tourism industry in Sweden, but it is the foreign tourists who grow the most, and who will be affected by the price of the flight tickets. The economic downturn will be negative for foreign tourists but positive for national ones since they will stay at home if they are worried about their personal economy.<sup>196</sup>

<sup>195</sup> The Swedish Institute (2008) *Sverigebild* 08

<sup>196</sup> E24 (2008) *I sommar avgörs turismens öde*

## 5 Analysis

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*Here we present our thoughts and discussions through an analyzing process. We present the result from the empirical section, and compare the three perspectives with each other when searching for gaps.*

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“Our purpose is to compare the actual Swedish Identity with how the governmental organizations have chosen to portray it towards foreign tourists, furthermore to compare these two aspects with how foreign tourists perceive Sweden.”

We will start by presenting our results of the three aspects: *the Swedish Identity*, *the Swedish Brand Identity* and *the Swedish Brand Image*. Afterwards we will discuss the gaps we have found between these perspectives.

### 5.1 The Swedish Identity

The common views we see represent the Swedish identity are the nation’s culture, being a country that has a lot to offer in design, literature, art, movies and music. Sweden is also a country of innovation and successful companies: IKEA with its simple and functional design and H&M, which is a leading fashion company around the world. Sweden is also a country where the majority of the area consists of nature, with a mild climate, clear water and a high quality of the environment. The nature in Sweden is also something that is opened for everyone, the right for public access, and in the country live some wild animals that only exist in this part of the world.

Sweden is a country with people that are concerned about the environment, and Sweden is a leading country in taking action against global warming. Sweden is also a democratic country that is neutral in foreign affairs, with a welfare system and high taxation policy. Sweden is an expensive country compared to other countries. Sweden is also a country of equality, by having laws that prohibits discrimination of people based on their gender, disabilities and ethnical background. Sweden is also involved in peace efforts like the UN and EU.

Sweden is a very multicultural country, which has accepted many immigrants. The Sami culture is one of the oldest cultures in Sweden. Swedes celebrate the changes of seasons through the traditions Midsummer, Crayfish parties, Walpurgis and Lucia.

The Swedish tourism measured in overnights consist of 23% of the overall figure, where 9% are from other Scandinavian countries, 11% from Europe except Scandinavia and 3% from countries outside of Europe. Hotels are the most common accommodation in Sweden. The years between 1998 and 2007 show an increase in Swedish tourism: between 2006 and 2007 the increase was +2.26 %.

## **5.2 The Swedish Nation Brand Identity**

The organizations' goal is to promote Sweden as a progressive country, by implementing the core values openness, innovation, authenticity and consideration to influence all promotional material.

Sweden is portrayed as a country where the nature is the most important factor for visiting and can even be seen as a cultural heritage. The proximity between the urban cities and untouched wilderness is promoted, also the variety of the Swedish regions and seasons and the tradition of Midsummer. The concern for the environment is highlighted as important, so is the equality between the sexes and children rights.

Furthermore, Sweden is portrayed as an affordable country, which can offer modern design, innovation and creativity and where modern technology is easily adapted. For some visitors, they portray a children friendly country with many activities targeting children, for others the purpose is to promote the fishing and outdoor life.

## **5.3 The Swedish Nation Brand Image**

Sweden is usually associated with *high quality for life, welfare, education, tolerance, openness and equality*. From the studies we found out that Sweden is ranked low in the dimensions Culture and Heritage and Tourism, but higher in the dimension People.

Foreigners believe the cultural activity most likely to be produced in Sweden is classic sculptures and museums and visitors think that a trip to Sweden would be fascinating, exciting but predictable. Respondents have answered that they think they would feel welcome in Sweden and that they would like to have a Swede as a friend or in their company. The Swedish people were described as *reliable, hard working, intelligent, honest, not uncongenial, not violent and not particularly fun.*

### 5.4 Gaps

From the theories about the three perspectives *National Identity, Nation Brand Identity and Nation Brand Image*, we saw a connection. In the problem discussion we presented a triangle model, Figure 1. To give a visual reminder of the triangle, we have chosen to insert the figure here too, Figure 6. When comparing the triangles circulation flow with the theories to the empirical material we could find gaps. As mentioned in the nation brand equity and theories on gaps, gaps emerge when the different perspective does not comport with each other. The following text is an analysis of the empirical material in comparison with the theories.

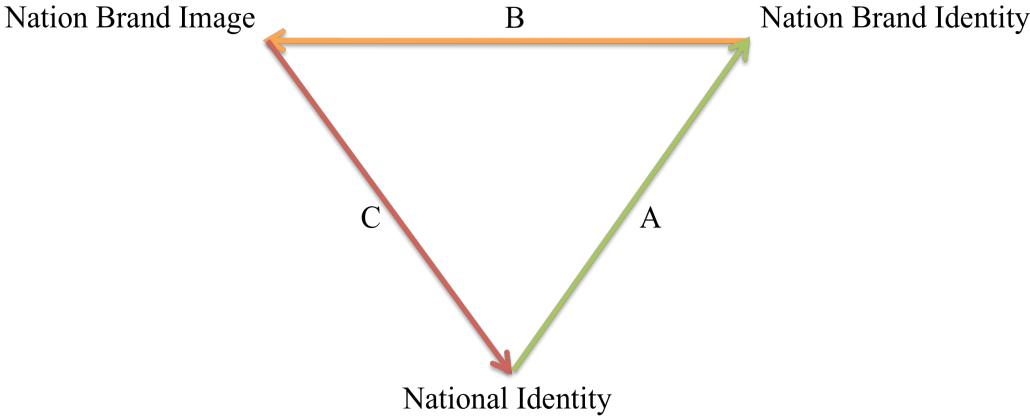


Figure 6: Circulation flow between *National Identity, Nation Brand Identity and Nation Brand image.*

#### 5.4.1 Focuses

The governmental organizations focuses are different in some areas but we do not see this as a disadvantage. Our study has showed that the pictures they are portraying do not clash, but

instead complement each other by together portraying different views of Sweden, which build up the whole picture.

## **5.4.2 Geography**

### **Nature**

When it comes to the portrayed and perceived picture of the nature aspect of Sweden, we found out that the organizations are portraying a rightful, but not fully representative picture out to the consumers in the rest of the world. After looking at the measurements done we think that what is portrayed is also perceived in the same way. However, Sweden has protected animals, camping and a good environment - aspects of the Swedish nature that are important but not promoted. The governmental organizations promote the geography widely and as one of Sweden's major assets in comparison to other countries which is inline with the Swedish identity. Even though we see that they have chosen to promote the variety in nature, they have still missed to promote some unique features as the Northern Lights or the midnight sun in the films or on their websites.

The fact that Sweden has a very mild climate is nothing that is mentioned, the winter promotion of Sweden can even be viewed as a bit harsh, despite that it in many parts of Sweden is practically without snow in the winters. The governmental organizations also give the impression that Sweden is warmer than it actually is by saying that it is possible to swim in Skåne from early June until September, we find this questionable since the water is cold. They are very successful in promoting the wilderness and loneliness of the Swedish nature life, but misses out on the famous unique animals that only exist in this part of the world.

We identified that the purity of nature existing in Sweden would apply to the tourists. Sweden is the country that is ranked at number one when it comes to clean water, which also is an aspect that could appeal to the purity of the Swedish nature as much as the high quality of the environment. It is the small details that need to stand out. Sweden is a country with a clean environment, and by portraying this through showing clean water, the Northern Lights and the Midnight Sun, Sweden could appeal to its audiences even more by differentiating itself from

other nations. From the theories we can see the importance of differentiating one brand from another.

## **Sustainable Development**

We saw that the governmental organizations are portraying the sustainable development part strongly. Sweden has been noticed for its stand on the environmental issues abroad and it shows that the people are responsible in Sweden. This gives Sweden a high goodwill and trust. However, there are aspects in this area that are not portrayed, and because of its importance it creates a smaller gap. We refer to the portraying of the Swedes actions towards the environmental issues, which could differentiate Sweden from other nations. By showing Sweden's awareness of the environment through pictures of recycling stations and of paper, plastic bottles or glass bottles being recycled it could increase the positive image of Sweden abroad. In our study we can see how important the environment part is, and how this will affect tourism in the future. People are getting more environmentally concerned and the governmental organizations mention that this is starting to give Sweden an advantage. The positioning of Sweden may although work as a disadvantage in the future since the most common way to get to Sweden is by airplane, which has a negative effect on the environment.

Even though the environment and the nature are important when it comes to Sweden, foreigners usually spend most of their nights in hotels and not in campsites. Campsites are also most favorable for other Scandinavian countries and Germany. The governmental organizations talk about the proximity of traveling between nature and cities, and perhaps it is important for tourists to stay in comfortable hotels while experiencing the outdoor life and nature. If the environment is so important to tourists, more foreigners would be camping in Sweden or renting cabins to show a care for the environment. If the proximity between nature life and urban cities are of such importance, maybe the developed transportation between them would be positive to portray. The governmental organizations are portraying Sweden as a country, which does the right thing for the environment, something that is also perceived by the consumers in the same way. According to us this environment issue creates a gap because Sweden does not portray it in their promotional material, the reason why foreigners still know about the environmental concern is probably because of the media. It is important for Sweden to portray this picture, and not to leave it up to the media.

### **5.4.3 Values and people**

#### **Equality**

In nation branding it is important with peoples' values, the equity of a nation brand can be measured through consumers' perceptions. Sweden does not have a goodwill problem, because of the values being portrayed and the perceived picture of the people abroad in research studies. According to the Swedish identity, Swedes are a friendly people, with a high equality, working to become a nation where no discrimination takes place. We can see that the governmental organizations portray these values outwards to some extent. A gap that we can see is in the way of portraying equality. The governmental organizations show pictures where women are portrayed in high positions within workplaces considered as more masculine, like the car industry. However we noticed that these pictures are portraying how women are equal to men, and not how men are equal to women. We see no portrayed pictures of men in typical female workplaces, for example in childcare. In Hofstede's survey we see that Sweden is in the top when it comes to being a country of equal values by being a feminine country, but in the promotional material we can only see one side of the story.

Another gap that we found within Sweden's equality values was the multicultural aspect of Sweden, which is not promoted even though foreigners constitute a large part of the Swedish population. By promoting this aspect and showing the welcoming of different ethnical backgrounds, it would probably increase the perceived equality picture of Sweden.

#### **Stereotypes**

The governmental organizations are playing with the stereotypes when portraying Sweden outwards; creating gaps through expectations that will not be fulfilled. This prohibits the building of emotional relations, which also leads to a gap. The stereotypes we see being portrayed are blond women with blue eyes running around in the nature, swimming, laughing, with their hair waving in the wind, everyone esthetically attractive and thin.

In contrast to this we know that the governmental organizations wish to modernize the image of Sweden by diminishing the stereotypes. The governmental organizations are not moving

away from the stereotypes instead they promote them. By promoting that Sweden consist of these stereotypes the governmental organizations are not portraying a correct picture outwards, and therefore they are creating a gap in the triangle. We also argue that they are creating a gap in building up expectations that will not be fulfilled when traveling to Sweden. It is wrong to promote that Sweden has blond people that are happy, but Swedes have all sorts of hair colors and cultural backgrounds. The fact is also, that most Swedes live in the cities and not on the countryside. The governmental organizations say that they portray a multicultural picture of Sweden, but we do not agree after looking through their promoting material. The Swedes attitude towards foreigners ranks at place 20 of 130 which is rather high and an area where Sweden could be promoted better. By showing pictures of people with different ethnical backgrounds working together and living in Sweden would portray the Swedes and Sweden more correctly.

#### **5.4.4 Culture**

In the stereotype section we have already seen some aspects of the portrayed and perceived picture about the multicultural aspects in Sweden. An old culture existing in Sweden is the Sami culture. By portraying this old cultures would show that Sweden actually has a rich culture and heritage, something which is not actually perceived by the consumers. The governmental organizations did not choose to portray this culture in any special way, which creates a gap between the actual and portrayed identity. Sweden's culture is rich in areas covering literature, film industry, art, music, modern design, fashion and food. From these aspects the governmental organizations have chosen to portray the food picture and the modern design. Sweden is a monarchy with an existing Royal Family, which is loved by its people and shows that Sweden has an old history that still lives on. Sweden is also known for the Nobel Prize. The portrayed picture about these elements is fair even though they constitute important factors of the Swedish identity and could be interesting for tourists. Another interesting aspect of Sweden is its traditional celebrations. The only pictures of the Swedish unique and special traditions portrayed by the governmental organizations are pictures from Midsummer. We wonder why they exclude pictures from Lucia, Walpurgis and the Crayfish celebrations. The organizations could increase the fair image of the culture and heritage dimension by portraying these cultural aspects of Sweden. From the empirical material we have understood that sports are very important for the Swedish people, and is also very known abroad. In the theory we learned that sports is an important factor, which the culture is built



upon. Therefore it would be useful for the Swedish organizations to use sports, in particular soccer, in their promotion. Swedish sport stars could be used with an advantage with the building of the Swedish nation brand.

### **Affordability**

We also see a gap between the portrayed picture and the actual Swedish identity, where Sweden is promoted as an affordable country when discussing expensive restaurants. “Sweden used to have a reputation of being an expensive country but in recent years the image has changed. Most of all, Sweden is a country where shoppers get quality for their money.” This sentence among others makes the tourist expectations of reasonable price levels high. The reality is that Sweden is quite an expensive country. Here we have a threatening gap where reality does not match with the portrayed picture.

### **Security**

The security in Sweden is an advantage for Sweden, and according to us a nation’s security might affect travelers’ choice when choosing where to go. The only extreme value in the survey was traffic accidents were Sweden ranked in place 40 out of 130. The ranking in traffic security might be to the disadvantage of Sweden since the transportation between the nature and the cities are so important for tourism, which the governmental organizations mentioned.

The perceived image of Sweden does not imply that Sweden is a dangerous and unsafe place to visit. Swedes are described as friendly, not uncongenial, reliable, honest and not violent. However, we did not get a feeling that the governmental organizations make any effort to portray Sweden as a safe place, perhaps it is not important since Sweden is perceived safe in foreigners’ eyes. Since Sweden is a neutral country, safety is an important issue and something that should be portrayed.

#### **5.4.5 Target groups**

The target groups, which the governmental organizations have chosen to portray the identity to, are groups that definitely will grow. The WHOPs consist of baby boomers that soon will retire, a smart target since they will be many with money to spend. The DINKs are also rich

people, but targets a younger generation, a thoughtful decision because it is a group that will be able to consume the expensive life that are portrayed by the governmental organizations. The Corporate Meeting segment is very important for Sweden because it can be positive for foreign investments and possibly exports. The Active Family is a good target group and will be fruitful because of the rich nature life and experiences Sweden can offer.

What we were wondering about concerning the target groups, was the absence of the group of backpackers who might start to find Sweden on the map, the young budget travelers. The governmental organizations do not want to portray Sweden towards this group even if they had the budget for it, because they think that budget travelers will become part of the DINK group in time. There might be a risk of missing to create an awareness of the nation brand Sweden in time; the brand can be created already at an early stage in a person's life and lead to word-of-mouth marketing. By only limiting the target groups to people with high incomes, they are missing out on many other travelers and focusing on getting visitors who will purchase a lot instead of aiming for getting loyal visitors. The urban cities might be expensive for budget travelers, but the countryside, the forest and the nature existing in Sweden are free of charge, because of the *right to roam*.

We have understood that the governmental organizations are portraying different pictures to different countries. In Europe we see that the target groups WHOPs, DINKs and Active Family are the main targets. In the United States the Active Family is excluded. According to us the Active Family target group probably exists in the Scandinavian countries or a few European countries, for example in Germany, where we from our empirical material have understood that camping and holiday villages are more popular for accommodation. Therefore it is fair enough to exclude the Active Family targeting group outside these regions. However we are also aware of when doing so, the information targeting the Active Family will never reach outside certain regions, maybe this target group could be large outside of Europe but is excluded. We therefore argue that the governmental organizations create a gap by not portraying the whole Swedish identity outwards and also by excluding targets groups outside of certain regions.

#### **5.4.6 Cooperation**

When it comes to the cooperation between the governmental organizations and the local tourism authorities, Sweden has done a good job according to us. This because it seems to be important for the national organizations to secure that the identity the local organizations are promoting is the same as the national one. We see this as very important because it decreases the risk of a discrepancy resulting in a gap between messages being sent out by Sweden as a country.

Even though the governmental organizations admit that the other Scandinavian countries are their main competitors when it comes to tourism, they are willing to cooperate with them when promoting the region abroad because it gives Scandinavia a stronger competitiveness. The governmental organizations are not afraid that tourists will choose the other Scandinavian countries instead of Sweden, because at the moment Sweden seems to be chosen in firsthand. In fact, Sweden is already cooperating with the other Scandinavian countries, notably in Asia and New York. We think that this cooperation is a good thing because Swedish governmental organizations does not spend much money on tourism and does not prioritize tourism. Knowing that the awareness of Sweden is low in some areas of the world and that Sweden does not have the budget to reach it alone, we think that it is good for Sweden to cooperate. We initially thought that it might be hard for Sweden to stand out from other Scandinavian countries, however this does not seem to be the case as mentioned earlier. It is notable that the Active Family target group using camping and holiday villages for lodging is more likely to arrive by their own car which would not be the case for tourists arriving from USA or from Japan. Hence, the tendencies among these visitors are not necessarily to use the camping/holiday visitors.

#### **5.4.7 Awareness**

The gap that we see as the most visible one is the awareness problem, where the sender's message does not reach the receiver. It is important to influence the consumers' choice of visiting Sweden, to do this Sweden needs to have awareness in the world. We understand from both the governmental organizations and the consumers' view of Sweden that the message about Sweden does not reach every country in the world or that the picture is poorly

perceived. The further away from Sweden the countries get geographically and culturally, the awareness is lower. Continents like Asia, South America and Africa have a very low awareness or no awareness at all of Sweden. Sweden is also a country with a low amount of overnights from foreign travelers, especially from regions outside of Europe. European overnights spent in Sweden mostly consist of visitors from the Scandinavian countries. The perceived image of Sweden also shows that travelers would not choose Sweden in first hand as a travel destination even if money were not an obstacle. The reason why people not choose to travel to Sweden might be the low awareness of the nation abroad, which creates a large gap. To increase the perception of a nation, visual design can be helpful. The governmental organizations are already spreading a lot of visual images of Sweden. However, visual images do not matter if countries have no awareness of it, or is very low. The governmental organizations are trying to increase the awareness of Sweden by attending exhibitions and portraying the Swedish pictures in twelve big cities around the world.

#### **5.4.8 Awareness of gaps**

The governmental organizations have a split view of the existing gaps between the portrayed and perceived picture of Sweden. On one hand they admit that there is a gap because the tourists have high expectations, which does not get fulfilled when traveling to Sweden. On the other hand the governmental organizations say that there are no gaps because people who are well educated or have already visited Sweden know the correct picture of Sweden. We agree with the first part but find the second part a bit narrow minded and ignorant by excluding all other groups of people who are not well educated or have not yet visited Sweden. It is important to create long lasting relationships and make the consumers emotionally attached to create loyal customers. By focusing too narrow-minded it can prevent other groups of even creating an image of Sweden and wanting to find a relation to the country. It is not wrong to focus, but we think that it is wrong to exclude groups by not even consider them. The goal should not be to limit the target to the tourist and foreigners who already have been to Sweden, where the gap is the smallest. It should be just as important or even more important to influence the people who have not yet been to Sweden, this is where the gap is the largest and should be diminished.

# 6 Conclusions

*From the analysis we could draw some conclusions, which are presented in this section. We also speculate on what will happen in the future and how this study can be utilized, and what we would find interesting for future research.*

## 6.1 Summary of Results

Our purpose was “[...] to compare the actual Swedish Identity with how the governmental organizations have chosen to portray it towards foreign tourists, furthermore to compare these two aspects with how foreign tourists perceive Sweden”. In table 1a:b, the results from the analysis are presented: specifically highlighting in which areas we found gaps between the three perspectives.

Area	No Gaps	Gaps
Focuses	<ul style="list-style-type: none"> <li>The two organizations are complementing each other</li> </ul>	
Geography - nature and sustainable development	<ul style="list-style-type: none"> <li>The variety and proximity between cities and nature</li> </ul>	<ul style="list-style-type: none"> <li>The specific unique features, Northern Lights, Midnight Sun</li> <li>Mild climate</li> <li>Unique animals</li> <li>Clean water</li> </ul>
	<ul style="list-style-type: none"> <li>Sustainable development</li> </ul>	<ul style="list-style-type: none"> <li>Recycling</li> <li>Environmental concern</li> <li>Infrastructure</li> </ul>
Values and People – Equality and stereotypes	<ul style="list-style-type: none"> <li>Equality</li> </ul>	<ul style="list-style-type: none"> <li>Men’s equality</li> <li>Multicultural aspects</li> </ul>
		<ul style="list-style-type: none"> <li>Promotion of the stereotypes</li> </ul>

**Table 1a: Table over analysis results**

Area	No gaps	Gaps
Culture – affordability and security	<ul style="list-style-type: none"> <li>• Food and modern design</li> </ul>	<ul style="list-style-type: none"> <li>• The Sami Culture</li> <li>• The Royal Family</li> <li>• Nobel Prize</li> <li>• Traditions</li> <li>• Sports</li> </ul>
		<ul style="list-style-type: none"> <li>• False promotion concerning affordability</li> </ul>
		<ul style="list-style-type: none"> <li>• Safety</li> </ul>
Target groups		<ul style="list-style-type: none"> <li>• Budget Travelers</li> <li>• Young Travelers</li> <li>• Active Family segment excluded in some locations</li> </ul>
Cooperation	<ul style="list-style-type: none"> <li>• Positive for competitiveness</li> </ul>	
Awareness	<ul style="list-style-type: none"> <li>• Focus on twelve cities</li> </ul>	<ul style="list-style-type: none"> <li>• Low awareness of the Swedish picture geographically and culturally far away</li> </ul>
Awareness of gaps	<ul style="list-style-type: none"> <li>• Some awareness of existing gaps in expectations</li> <li>• Knowledge about a low awareness of Sweden in some countries abroad</li> </ul>	<ul style="list-style-type: none"> <li>• Not taking into account other groups than well educated people and people who have visited Sweden</li> </ul>

**Table 1b: Table over analysis results**

## 6.2 Preventing Gaps

The gaps we have found are not dramatical or enormous, they are neither representing a large faux pas in the strategy of the Swedish governmental organizations. We mean that all gaps must be measured and evaluated in order to prevent them from growing larger, and if possible, they must be reduced. In the summary of results section, we have presented different types of gaps between different types of identities and perceptions. The organizations need to change their portraying of some of the aspects of the Swedish Identity in order to make the picture more accurate and consistent with reality.

There are areas in the world where there is no awareness about Sweden at all. In these areas, we talk about awareness gaps. These gaps should not be decreased by changing the consumers' current perceptions, but by creating perceptions at all. Sweden is rarely portrayed in a bad way in media and by word-of-mouth and therefore the organizations' work can be successful. The organizations might want to change their geographical focus areas in order to create awareness in places in the world where awareness does not exist. They could also change the current core values they want to promote, to values more inline with the actual Swedish Identity. In some areas we can see that the consumers' perceptions are not at all the same as neither the portrayed identity nor the actual identity. The priority of the promotional activities need to be where the consumers' perceptions are wrong so that it can be changed, in areas where the consumers' already have a fair knowledge is the promotion not as important.

From our study we found some activities that could decrease the size of the gaps and prevent new gaps to arise. By cooperating with other neighboring countries Sweden creates awareness for the region of Scandinavia in areas where the awareness is low. To be visible in other types of media is important in order to reach out to more consumers. Sweden has used the possibilities of Internet by creating an own social community, with writing blogs and by being present with an embassy in Second Life.

### **6.3 Future Speculations**

For the future concerning the development in the Swedish identity, we do not think it will change anytime soon. We base this speculation on the fact that an identity is not changing overnight since it is based on a country's traditions, heritage and values. Concerning foreign policy, Sweden is a neutral country which means it will probably not get involved in any war or become enemy of any country on a short term basis. The fact that Sweden is part of the European Union could mean that the country need to change some of their rules and regulations in the integration process, although we do not see these changes as a risk for the Swedish brand. Sweden's membership in the EU is according to us probably positive because the awareness of EU in other parts of the world could have an impact on the awareness of Sweden. If Sweden also would transcend to the Euro it would simplify for European tourists. We see a risk in Sweden's location when discussing the concern for the environment and affordable travel prices. If the oil prices will increase air traveling will be more expensive and if the concern for the environment increases then people will probably want to travel by other means of transport.

### **6.4 Utilization of Results**

We do not think that our results can be applied in studies of other nation brands because all nations are complex phenomenon that differ from each other, therefore the study cannot be generalized. However, our approach and way of conducting the study and also our choice of theories and way of conducting our analysis from our figure can be used by other nations to evaluate gaps between their national identity, nation brand identity and nation brand image and this makes the study's methodology possible to be generalized.

### **6.5 Contributions to the Theories**

What we can contribute with to already existing theories is a methodology to follow for other countries wishing to evaluate the strategy and possible gaps concerning nation branding. We have created a triangular model, which show a circulation flow between the national identity, the nation brand identity and the perceived nation brand image. With this model it is easy for



other countries to understand and measure their own nation brands and find out if there are gaps that could be decreased.

From this study we have also understood the importance of awareness creation, cooperation, and use of new media when discussing nation branding. When dealing with nation branding we have found these activities to be very important. We have come to realize that if a nation does not have any awareness in a country, the portraying of the nation in these countries are difficult. We have also found that cooperation between smaller countries that are lacking in awareness can help to strengthen the competitiveness of these countries and decrease an awareness gap. Furthermore we realized the importance of the use of new media in the promotion.

## **6.6 Further Research**

We think that our study could be a good starting position for further research, in which we would suggest the researcher to do both a quantitative survey and qualitative interviews. The reason for a mixed-method approach is to be able to get both a breadth geographically, and a depth in answers in the study. We feel that the research should reach out to three groups representing the three perspectives in the triangle showed in the analysis: *the people living in Sweden, organizations and media portraying Sweden* and *foreigners of Sweden*. When conducting our research we felt that information from all of these groups would have given us a more correct perception on the perspectives in the triangle. There are already some empirical material on this matter, but we feel that the content is thin and synoptic, some questions in the conducted surveys seemed biased and leading, and was also done for another purpose. Other studies need to be objective to be able to take in both sides and to be fair, truthful and correct.

Research on the importance of how something is communicated when dealing with nation branding is also something that could be researched on. When we conducted our study we realized that the communication aspect played an important role concerning the awareness aspect, and that the communication aspect is very important to take into consideration when discussing the triangle model. This because the way something is communicated can affect the message of a picture being portrayed.

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## **Telephone Interviews**

Bo Söderström, Visit Sweden (Interview conducted 2008-05-16)

Thomas Carlhed, the Swedish Institute (Interview conducted 2008-05-22)



# Appendices

## Appendix A – Interview Guide

- What does nation branding mean to SI/Visit Sweden
- What is the purpose of SI's/Visit Sweden's work?
- What does the Swedish identity mean to SI/Visit Sweden?
- Which are the important factors/core values in the Swedish identity according to SI/Visit Sweden?
- Do you think that Sweden is an affordable country?
- What picture of Sweden does SI/Visit Sweden want to portray outwards? Which aspects are important?
- Have the portrayed picture changed in the last decennium?
- Which expectations do you think that SI/Visit Sweden gives out?
- What would you like to develop in the picture of Sweden?
- In SI's/Visit Sweden's report *Sverigebilden 08/Sverigebilden 2008* it appears that the view of Sweden is not positive in every country or countries have a low awareness, for example India has a low awareness, why do you think this is the case and how can this picture be changed to a positive one or how can the awareness of Sweden increase?
- Which disadvantages with the current positioning of Sweden exist today?
- How do you think future trends will look like?
- Which associations and rumors do you think exist about Sweden?
- How do you work to counteract negative stereotypes about the Swedish identity?
- How is the Swedish picture portrayed in foreign media?
- Do you experience a gap between the picture that SI/Visit Sweden portrays outwards and the picture perceived abroad?
- Which are the SI's/Visit Sweden's goals and focuses in 2008?
- Is there a current cooperation with other Scandinavian countries to be able to get a stronger competitiveness?
- Which current ongoing campaigns is SI/Visit Sweden conducting concerning the Swedish picture in general?

# Appendix B – The travel & Tourism Competitiveness Index<sup>197</sup>

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....5...■	8.01	Hotel rooms* .....22...■
1.02	Property rights .....9...■	8.02	Presence of major car rental companies* .....33...■
1.03	Business impact of rules on FDI .....9...■	8.03	ATMs accepting Visa cards* .....36...■
1.04	Visa requirements* .....30...■	<hr/>	
1.05	Openness of bilateral Air Service Agreements* .....75...■	<b>9th pillar: ICT infrastructure</b>	
1.06	Transparency of government policymaking .....7...■	9.01	Extent of business Internet use .....3...■
1.07	Time required to start a business* .....31...■	9.02	Internet users* .....3...■
1.08	Cost to start a business* .....4...■	9.03	Telephone lines* .....6...■
<hr/>		9.04	Broadband Internet subscribers* .....8...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....24...■
2.01	Stringency of environmental regulation .....3...■	<hr/>	
2.02	Enforcement of environmental regulation .....3...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03	Sustainability of T&T industry development .....31...■	10.01	Ticket taxes and airport charges* .....28...■
2.04	Carbon dioxide emissions* .....83...■	10.02	Purchasing power parity* .....122...■
2.05	Particulate matter concentration* .....3...■	10.03	Extent and effect of taxation .....125...■
2.06	Threatened species* .....14...■	10.04	Fuel price levels* .....122...■
2.07	Environmental treaty ratification* .....1...■	10.05	Hotel price index* .....79...■
<hr/>		<hr/>	
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01	Business costs of terrorism .....18...■	11.01	Primary education enrollment* .....38...■
3.02	Reliability of police services .....21...■	11.02	2ndary education enrollment* .....18...■
3.03	Business costs of crime and violence .....16...■	11.03	Quality of the educational system .....16...■
3.04	Road traffic accidents* .....40...■	11.04	Local availability of research and training services .....4...■
<hr/>		11.05	Extent of staff training .....3...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....118...■
4.01	Physician density* .....19...■	11.07	Ease of hiring foreign labor .....71...■
4.02	Access to improved sanitation* .....1...■	11.08	HIV prevalence* .....49...■
4.03	Access to improved drinking water* .....1...■	11.09	Business impact of HIV/AIDS .....5...■
4.04	Hospital beds* .....34...■	11.10	Life expectancy* .....3...■
<hr/>		<hr/>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....88...■	12.01	Tourism openness* .....58...■
5.02	T&T government expenditure* .....90...■	12.02	Attitude of population toward foreign visitors .....20...■
5.03	Effectiveness of marketing and branding .....74...■	12.03	Extension of business trips recommended .....120...■
5.04	T&T fair attendance* .....32...■	<hr/>	
<hr/>		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....15...■
6.01	Quality of air transport infrastructure .....17...■	13.02	Nationally protected areas* .....61...■
6.02	Available seat kilometers* .....42...■	13.03	Quality of the natural environment .....5...■
6.03	Departures per 1,000 population* .....22...■	13.04	Total known species* .....95...■
6.04	Airport density* .....9...■	<hr/>	
6.05	Number of operating airlines* .....22...■	<b>14th pillar: Cultural resources</b>	
6.06	International air transport network .....17...■	14.01	Number of World Heritage cultural sites* .....11...■
<hr/>		14.02	Sports stadiums* .....17...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....15...■
7.01	Quality of roads .....17...■	<hr/>	
7.02	Quality of railroad infrastructure .....10...■		
7.03	Quality of port infrastructure .....9...■		
7.04	Quality of domestic transport network .....7...■		
7.05	Road density* .....27...■		

<sup>197</sup> Blanke, J., Chiesa, T. et al. (2008) *The Travel & Tourism Competitiveness Report 2008*

**Appendix C - Nights spent in Sweden 2007 at hotels, holiday villages, youth hostels and camping by visitors from their country of residence.<sup>198</sup>**

	<b>Hotels</b>	<b>(%)</b>	<b>Holiday Villages</b>	<b>(%)</b>	<b>Youth Hostels</b>	<b>(%)</b>	<b>Camping</b>	<b>(%)</b>	<b>Total</b>	<b>(%)</b>
<b>Total</b>	25 416 188	100	3 467 012	100	2 710 327	100	17 011 720	100	48 605 247	100
<b>Sweden</b>	19 574 419	77.02	2 699 810	77.87	2 092 445	77.20	13 038 202	76.64	37 404 876	76.96
<b>Foreign</b>	5 841 769	22.98	767 202	22.13	617 882	22.80	3 973 518	23.36	11 200 371	23.04
<b>By which</b>										
<b>Scandinavian countries except Sweden</b>	1 592 877	6.27	394 305	11.37	116 788	4.31	2 108 657	12.40	4 212 627	8.67
<b>European countries except Scandinavia</b>	2 809 421	11.05	336 182	9.70	419 732	15.49	1 821 077	10.70	5 386 412	11.08
<b>The World except Europe</b>	1 439 471	5.66	36 715	1.06	81 362	3.00	43 784	0.26	1 601 332	3.29
<b>By which</b>										
<b>America</b>	485 084	1.91	2 179	0.06	31 711	1.17	-	-	518 974	1.07
<b>Asia</b>	330 248	1.30	2 300	0.07	23 429	0.86	-	-	355 977	0.73
<b>Australia</b>	32 067	0.13	214	0.01	9 763	0.36	-	-	42 044	0.09
<b>New Zealand</b>	5 209	0.02	20	0.001	1 692	0.06	-	-	6 921	0.01
<b>The rest of the world</b>	508 488	2.00	973	0.03	5 854	0.22	43 784	0.26	559 099	1.15
<b>No country given</b>	78 375	0.31	31 029	0.89	8 913	0.33	-	-	118 317	0.24

<sup>198</sup> NUTEK & SCB (2008) *Accommodation statistics 2007*

## Appendix D - Nights spent in Sweden 1998 – 2007 at hotels, holiday villages, youth hostels and camping by visitors from their country of residence.<sup>199</sup>

(1000 <sup>th</sup> )	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
<b>Total</b>	37 498	39 855	39 809	41 194	42 710	44 054	42 555	44 940	47 705	48 605
<b>Sweden</b>	29 469	31 254	31 155	32 061	32 943	34 339	33 033	34 862	36 754	37 405
<b>Foreign</b>	8 029	8 601	8 654	9 133	9 768	9 715	9 522	10 078	10 952	11 200
<b>By which</b>										
<b>Scandinavian countries except Sweden</b>	2 768	3 299	3 172	3 374	3 995	3 917	3 663	3 872	4 196	4 213
<b>European countries except Scandinavia</b>	4 035	4 045	4 109	4 311	4 457	4 523	4 473	4 773	5 248	5 386
<b>The World except Europe</b>	1 226	1 257	1 374	1 449	1 315	1 275	1 387	1 432	1 508	1 601
<b>By which</b>										
<b>America</b>	406	440	450	493	467	419	442	495	497	519
<b>Asia</b>	243	204	220	192	211	178	258	319	338	356
<b>Australia</b>	27	25	25	26	31	29	34	43	42	42
<b>New Zealand</b>	2	3	3	2	2	3	6	11	7	7
<b>The rest of the world</b>	514	523	587	587	509	528	487	431	509	559
<b>No country given</b>	35	62	91	150	95	119	159	133	115	118

<sup>199</sup> NUTEK & SCB (2008) *Accommodation statistics 2007*

**Appendix E - Increase and decrease in nights spent in Sweden 1998 – 2007 at hotels, holiday villages, youth hostels and camping by visitors from their country of residence.<sup>200</sup>**

(%)	1998 – 1999	1999 – 2000	2000 – 2001	2001 – 2002	2002 – 2003	2003 – 2004	2004 – 2005	2005 – 2006	2006 – 2007
<b>Total</b>	+ 6.29	- 0.12	+ 3.48	+ 3.68	+ 3.15	- 3.40	+ 5.60	+ 6.15	+ 1.89
<b>Sweden</b>	+ 6.06	- 0.32	+ 2.91	+ 2.75	+ 4.24	- 3.80	+ 5.54	+ 5.43	+ 1.77
<b>Foreign</b>	+ 7.12	+ 0.62	+ 5.54	+ 6.95	- 0.54	- 1.99	+ 5.84	+ 8.67	+ 2.26
<b>By which</b>									
<b>Scandinavian countries except Sweden</b>	+ 19.18	- 3.85	+ 6.37	+ 18.41	- 1.95	- 6.48	+ 5.71	+ 8.37	+ 0.41
<b>European countries except Scandinavia</b>	+ 0.25	+ 1.58	+ 4.92	+ 3.39	+ 1.48	- 1.11	+ 6.71	+ 9.95	+ 2.63
<b>The World except Europe</b>	+ 2.53	+ 9.31	+ 5.46	- 9.25	- 3.04	+ 8.78	+ 3.24	+ 5.31	+ 6.17
<b>By which</b>									
<b>America</b>	+ 8.37	+ 2.27	+ 9.56	- 5.27	- 10.28	+ 5.49	+ 11.99	+ 0.40	+ 4.43
<b>Asia</b>	- 16.05	+ 7.84	- 12.73	+ 9.9	- 15.64	+ 44.94	+ 23.64	+ 5.96	+ 5.33
<b>Australia</b>	- 7.41	± 0	+ 4	+ 19.23	- 6.45	+ 17.24	+ 26.47	- 2.33	± 0
<b>New Zealand</b>	+ 50	± 0	- 33.33	± 0	+ 50	+ 100	+ 83.33	- 36.36	± 0
<b>The rest of the world</b>	+ 1.75	+ 12.24	± 0	- 13.29	+ 3.73	- 7.77	- 11.5	+ 18.10	+ 9.82
<b>No country given</b>	+ 77.14	+ 46.77	+ 64.84	- 36.67	+ 25.26	+ 33.61	- 16.35	- 13.53	+ 2.61

<sup>200</sup> NUTEK & SCB (2008) *Accommodation statistics 2007*