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Country Branding in a Chinese Context: Using a Swedish Example

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Abstract

Title	Country Branding in a Chinese Context: Using a Swedish Example
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Keywords	Country Branding, Country-of-Origin, China, COO, Sweden in China, National Identity, Brand Image
Problem Discussion	Globalization and social media are factors that enhance the importance for countries to communicate their identity. The dynamics of competition has changed and in order to improve economic performance, attract tourism, trade and investment opportunities a strong country brand is needed.
Project Objective	This report aims to illustrate how country branding is done in China today, potential development during coming years and what is needed to succeed in creating a strong country brand in China. Furthermore, the report focuses on Sweden's presence in China and Sweden's country branding efforts.
Methodology	A qualitative approach for the research has been conducted with a cross-sectional approach. The information has been collected primarily through in-depth interviews and desktop research.
Theoretical Framework	The theoretical framework consists of the expertise of authorities within the field of country branding; Philip Kotler, Wally Olins and Simon Anholt, published research and publications as well as additional desktop research.
Empirical Data	23 in-depths interviews have been conducted with, among others, government bodies and company representatives, covering 13 countries; Canada, Chile, Finland, France, India, Indonesia, Israel, Malaysia, South Africa, Sweden, Switzerland, the UK and the US.
Conclusion	China will soon become the largest economy in the world. At the same time the competition on today's market has never been tougher. Countries are no longer platforms from which companies operate, they are brands, and are all fighting for China's attention. To develop a successful branding strategy in China countries need to understand the level of government control, what the government is looking for, and the competition it experiences from the social media. A branding strategy has to be suitable on a regional and local level, not just at a national level. It demands an understanding of changing values and expectations of the Chinese people both in the sense of a rapid diverse economic development but also due to geographical and cultural differences across the nation.

Semantics

Destination Branding and Place Branding	Destination or place branding is a process to create a competitive advantage for a geographically designated area, whether it be a province or a city.
Regional Branding	A process to identify the competitive advantage of a region that shares common attributes which separates it from the nation, or a selected geographical area. Regional branding will in this Thesis include the concepts of destination branding and place branding.
City Branding	City branding is the branding of cities. In this report it is discussed together with regional branding and place branding.
Brand Equity	The value built-up in a brand that stems from a high brand loyalty, awareness, perceived quality, and strong brand associations etc.
Country of Origin (COO)	The source country and the country from which a company originates.
Country-of-Origin effect	The effect that the manufacturing country has on the perception of a product.
Destination Country	Where a country is conducting country branding efforts (with the exception of within the country itself)
Brand Identity	The self-perception a country has of its national identity
Image	The general impression, and outward appearance, that is projected to others
Perception	The way others conceive a country's identity. Everything that is associated with the country itself and its inhabitants.
Narrative Branding	When a country or product is branded using a story.

Figure 1, displayed below, shows the transition that country branding entails between a country's self-conception of its identity and how other countries perceive the country's national identity. Country branding is a process that aims to bridge these two perceptions and make them both true so that perceptions correspond to what the country's core values are.

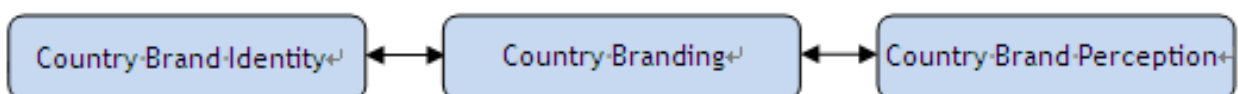


Figure 1 How a country's brand identity relates to how others perceive its identity

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1 Introduction

1.1 Background

Competition today is increasingly fierce. The world is the marketplace for all things traded and exchanged. The scale is larger, more diverse, with more competitors and a higher speed of change, trends and a growing pressure for economic gains and sustainable approach. Countries are no longer platforms from which companies operate, they are brands.

Globalization has changed the way that countries, companies and people relate to one another. It has changed the rules of competition on the market. Similar to when companies establish partnerships and joint ventures to gain market presence, countries are forming Unions and Trade Agreements. The relationships and dependencies for countries have changed, including their cities, regions, and multinational companies (MNCs). In the early stages of globalization a country was more dependent on its cities and agglomerated industries. Today, the global connectivity of a country, region or city, is largely dependent on its multinationals¹. As to the internal hierarchy between a country, city, region, or MNC, whichever carries more importance than the rest, opinions differ. Regardless, they are interdependent of each other. This leads to the conclusion that, not only is country branding utterly important for countries to withstand a toughened, global competition but the collaboration between the government of a country and the private sector will largely influence the level of success.

Globalization is further strengthened and enhanced by social media and online technology. Alongside global production chains and logistics, trade and financial flows, the online community works together creating complex systems that enhance and speed up the global development.^{2,3}

Ultimately, country branding aims to increase the attractiveness of a country and generate business, both in the country of origin (COO) as well as in the destination country. For countries that are perceived as having a strong country brand it is easier to conduct business and raise the level of perceived quality. Online technology has increased the level to which countries and companies can influence their perception and be influenced by each other. One country where online technology is hugely important is China.

China has experienced a rapid economic development, with an average annual growth rate over the past 20 years of 9.3%⁴. It is projected to become the world's largest economy in 2030 with a GDP surpassing USD 20 trillion. The Chinese population will continue to grow, reaching 1.5 billion people⁵ in 20 years, adding another 350 million⁶ to the current 1.15 billion which is more than the entire population of the US today. Furthermore, the urban population will reach 1 billion⁷ and by 2030 China will house 38% of the global middle class, consisting of 370 million people⁸.

It cannot be stressed enough what a large market China is, and increasingly will become, during the next 20 years. The questions for countries is not if, but how, they can succeed in creating a strong relationship with China and a presence on its market.

¹ McCann, 2010-10-09

² McKinsey, 2010-06-30

³ Patel, 2010-07-01

⁴ Trading Economics, 2011-04-15

⁵ Lawrence, 2007-10-16

⁶ McKinsey, 2011-03

⁷ McKinsey, 2009-03

⁸ Mckinsey, 2009-03

1.2 Problem Discussion

Country branding is a complex concept that depends on the efforts made by the COO itself but also in what context country branding is executed as well as the different target audiences. The branding platform of each country depends among other things on its history, earlier branding activities and the perception that the destination country and stakeholders have of it. Today, there are few that understand the complexity of country branding and how this concept can be utilized to strengthen the national competitive advantage and benefit both the country itself and its companies.

As discussed previously, globalization and social media are factors that enhance the importance for countries to brand themselves portraying their competitive advantage. The dynamics of competition has changed and country branding can be used in order to improve for example tourism, trade and investment opportunities.

China is quickly growing to become the world's largest market and a driving force in the world economy. Its market place is unique in the world, which highlights the importance of knowing the dynamics of this market before entering. China is acknowledged as a key market. Countries need to identify what competitive advantage they can leverage, that meet Chinese expectations. There are two aspects to this strategy; to gain market share on the huge market that is China but also to attract the attention of and to invite China to the COO as China is increasing its investment worldwide.

Social media is more important in China than in the rest of the world. The Chinese are among the world's most active internet users⁹ and use micro blogs and other social media channels to get any kind of information. There is a huge potential for countries to leverage the fact that Chinese individuals can help to strengthen the country brand on the market. Chinese trust peer reviews more than advertisements, and the opinions from friends, family and co-workers greatly influence their purchasing decisions. Furthermore, Chinese people very often recommend or dissuade products and experiences that they are happy with¹⁰ to people in their network, which emphasizes the power that Word-of-Mouth has in China.

Sweden has a strong country brand and has been present in China for over 60 years. It is a small country with limited resources that has to compete on the same terms as everybody else. How does a small country, such as Sweden, stand out and get the attention from the giant that China is and maintain that interest long-term?

Country branding as a strategic subject is still relatively new; it was 'founded' about 20 years ago. Existing research focus on trying to define what country branding, regional branding, place branding, destination branding etc. is and what it is not. There are examples of countries that have rebranded themselves successfully, such as Spain and South Africa, but so far there is not a systematic way of approaching the concept. This Thesis will clarify the complex dynamics of country branding and how the forces of the Chinese market influence different branding approaches for how country representatives can achieve a more successful branding strategy and potential focus areas.

⁹ <http://globalwebindex.net>

¹⁰ Accenture, 2008-01-17

1.3 Thesis Purpose

The main purpose of this Thesis is to highlight the importance of the concept of country branding when it comes to international governance and business. The Thesis analyzes how country branding is approached in China today both by China itself and country representatives and stakeholders present in China. The analysis includes the dimension of coming development of country branding and the market in China as well as what will be required of country representatives and stakeholders to create a strong country brand and remain competitive. Larger branding activities, such as the Shanghai World Expo 2010, increase in importance and greatly influence the competition. To clarify the discussion a case study of Sweden will be used as reference. The first sections aim to illustrate the concept of country branding, followed by how country branding is done in China today, potential development during coming years and what is needed to succeed in creating a strong country brand in China. In the final sections, the report focuses on challenges that arise in relation to large branding activities, Sweden's presence in China and Sweden's activities on the Chinese market.

1.3.1 Thesis Goal

The Thesis approaches three dimensions in the subject of country branding starting by inviting the reader to learn about the concept of country branding, moving on to focus on a specific market and then a specific country on that market. Each dimension contains objectives that are discussed with the aim of making the information in the Thesis more easily accessible.

The key questions and aspects being addressed are:

1.3.1.1 The Concept of Country Branding

- ✧ What are the challenges when it comes to branding a country? What are the complexities and 'contradictions' that one has to address?
- ✧ Collaboration Strategies

1.3.1.2 Country Branding in China

- ✧ Understanding the Chinese market
- ✧ What are the most important aspects that a country has to tackle?
- ✧ How can country branding be successfully applied on the Chinese market?
- ✧ What is the current situation of country branding efforts and strategies for countries in China?
- ✧ Target audiences; who are they and how to address them?
- ✧ Important aspect to address when participating in large branding events such as the Shanghai World Expo 2010

1.3.1.3 Country Branding Applied by Sweden in China

- ✧ What is Sweden's own image and the image that it wants to portray, and strategy, compared to the perception that the world and China has of Sweden respectively?
- ✧ What are the branding efforts done by Sweden in China; how does Sweden leverage the fact that it already has a strong country brand?
- ✧ What are the potential areas of improvement for Sweden's country brand in China?
- ✧ What are Sweden's experiences from participating in the Shanghai World Expo 2010?

1.3.2 Relevance and Future Suggestions

This Thesis addresses the reader that...:

- ✧ ...is interested in learning about country branding
- ✧ ...is new to the Chinese market
- ✧ ...works with Swedish representation
- ✧ ...works for a government body present on the Chinese market
- ✧ ...works for a company present on the Chinese market
- ✧ ...works with academic representation
- ✧ ...researchers that want to continue this research and develop the exploration of country branding further

Given that the concept of country branding lacks one clear definition and depends on the present context of the individual case this Thesis will:

- ✧ Give the reader an introduction to the subject of country branding and the dimensions that it includes based on own research and research published by authorities in the area
- ✧ Give the reader an introduction to the Chinese market and important aspects that one should be aware of when entering China
- ✧ Share findings of identified key success factors that can be implemented by government bodies or companies present in China
- ✧ Present a deeper analysis on Sweden's country branding initiatives on the Chinese market and their improvement potential

1.4 Limitations

This Thesis does not bring up the discussion of the differences between a country's brand and country branding. Furthermore, the chapter on the concept of country branding does not discuss the differences between country branding and company branding but rather state that there is a difference. The focus lies on country representatives' approach to country branding rather than company representatives'.

Under the time restraint given, as many in-depth interviews as possible have been conducted to cover as many areas as have been feasible. The result from the interviews is complemented with desktop research and published research to strengthen the analysis.

The subject is broad and all aspects and factors that influence the country brand are not included. The author has chosen perspectives that have been the most relevant considering the 'Sweden-in-China' angle.

Furthermore, seeing as China is so diverse with large differences internally when it comes to social and economic factors as well as cultural values and expectations this Thesis has focused on the Eastern and South-Eastern Coastal regions of China. These regions, the richest and most developed regions in China, are where most countries are focusing their branding efforts and the preferences and attributes applied to the Chinese in the Thesis are applicable.

The Thesis has not analyzed China's situation and its development from being 'the factory of the world' to becoming a world market. Furthermore, the Thesis does not discuss the challenges that China faces when trying to create successful multinational companies.

2 Methodology

This chapter will present the approach and the methods that have been used for collecting information in this research, as well as what sources have been used. The author stresses the fact that the information on which the discussion has been based will be presented in the Theory chapter. Furthermore, the discussion and analysis will be discussed throughout the Thesis. This concludes why the Methodology chapter is kept brief.

2.1 Approach

2.1.2 Qualitative and Quantitative Methods for Market Research

The main difference between a qualitative and a quantitative approach for market research is largely how the collected information is expressed and presented. In a quantitative research the collected information is expressed in categories, words and pictures while the information and data gathered through quantitative methods is usually coded in numbers and categorized. Similarly, an analysis is then presented by verbal reasoning and models rather than using statistical methods for analyzing clusters and internal dependencies presented in numerical tables and diagrams.¹¹

Defining attributes of a qualitative research method is a small number of respondents, usually 20 or less, less structured interview templates, to a larger extent affected by the subjectivity of the researcher himself, a non-probability selection and research data that is easier to understand for a non-expert audience.

2.2 Cross-sectional Approach

A study that selects several objects for investigation, in order to benchmark them and draw conclusions relevant for the entire population or market segment, is called a cross-sectional approach. A cross-sectional research project can be divided into two different types depending on the approach. A survey approach observes and registers the reality passively as it is without affecting it, while an experimental approach tries to adjust the studied reality according to what is considered relevant for the study.

Opposite of a cross-sectional approach can be mentioned a case study approach in which a few selected objects are thoroughly studied. The aim of this approach is to analyze each case individually and not draw conclusions and generalize for a larger market segment or benchmark the objects against each other.¹²

The main section of the Thesis consists of a qualitative market research with a cross-sectional approach, where 23 in-depth interviews have been conducted with identified relevant interviewees. The interview template¹³ has been adjusted depending on the position of the interviewee (government representative or company representative) and the collected information has been analyzed through subjective reasoning based on acquired knowledge of the researcher in the field. The interviewees, largely representing their respective country of origin, have been benchmarked and conclusions applied to the market segment, China in this case. The result has been presented using models and tables, illustrating and analyzing key findings and citations from interviews.

One country, Sweden, has been chosen for an in-depth analysis. The analysis has been performed using a case study approach, since Sweden in this aspect, is not used for benchmarking purposes but rather serves as a clarifying example. Furthermore, a short survey was created, using a quantitative research method with a survey approach, where the researcher aimed for a result with no involvement of the researcher herself.

¹¹ Lekvall, 2001

¹² Ibid

¹³ See Appendix

2.3 Sample Selection

A market research aims to, by studying a smaller selection, be able to draw conclusions of a larger population called the target population. Ideally, the whole population, or market segment, would be included, but due to resource restraints this is not feasible and for this reason a sample selection is used. The most important requirement for the sample is that it has to be representative for the whole population. The risk that the population does not correspond to the target population mostly depends on how large the sample is and how it is selected.

A sample selection can be chosen based on a probability selection or a non-probability selection. For a probability selection it is possible to calculate the risk quantitatively for inference errors while a non-probability selection is dependent on a qualitative judgment of error risks.¹⁴

2.3.1 Methods for Sample Selection

Sample selection can consist of...:

- ✧ ...outreaching selections where the researcher actively reaches out to research units
- ✧ ...instructive selections where the researcher collects his/her sample based on referrals from units already selected
- ✧ ...evaluating selections, commonly used for explorative studies, which prioritizes getting certain research questions highlighted.

The method for sample selection has mainly consisted of an evaluating selection since it was known what type of interviewees would be interesting for the study. The requirement for the interviewee is that they have a general knowledge of the subject in question and can contribute with their analytical perspective on the subject. However, it has proven difficult to get response from certain researching units, mostly company representatives, why an instructive selection has been used to complement the evaluating selection. Getting referrals can facilitate reaching and receiving responses from the right people.

2.3.2 Collecting Information

Collecting information is done through communication with the respondent and there are four main cases of communication that can be identified. Questions can be asked using a written survey and the communication is managed without any involvement of an interviewer. The researcher can conduct a telephone interview or a personal interview that is answered verbally or in written form through personal interaction between the interviewer and interviewee/s. Finally, the interview can be conducted over the Internet, which is considered a special instance of a written interview that is conducted via email, through a webpage or via a special register of emails collected by a market research company.¹⁵

Initially, contact was established with government representatives consisting of embassies and consulates with a presence in Beijing or Shanghai, and the Chamber of Commerce or Trade Council. A scan for company representatives was made in the internal database of Eastwei MSL, after which personal relations of the researcher and colleagues were utilized. Company representatives were in general more difficult to schedule interviews with than government representatives. The largest obstacle when communicating with embassies and consulates proved to be language barriers. The intended interviewee was then contacted via telephone or via email. The majority of the interviews have been conducted face-to-face. For some cases when this was not feasible a telephone interview has been done. In one exception an interview was sent over email where the respondent utilized the survey questionnaire.

¹⁴ Ibid

¹⁵ Lekvall, 2001

2.2 Validity and Reliability

When conducting a research project it is important to take into account the possibility of measurement errors; validity and reliability are two types of error imperfections¹⁶. A valid research is successful in reflecting the desired attribute, but judging the validity of a research by exact terms is impossible and has to be done subjectively. The reliability of a research is dependent on the research method and its ability to withstand influencing external factors such as the interviewee's changing personal traits, the interaction between the interviewer and respondent, differences between interviewers and other random attributes. If reliable, the study when repeated will generate the same result.¹⁷

Considering that this research is mainly conducted with a small selection of interviewees and that the information collected is based on their personal opinions the validity of the research project is quite low. The data material has, when possible, been strengthened with desktop research and published reports. The reliability of the project is lower when interviews are conducted but in the research only two interviewers have conducted interviews, which means that the information is more easily obtained with less risk of misunderstandings and wrong interpretations.

Through an adequate description of method, approach, theory and research, the researcher has aimed to clarify the subject and the different dimensions and elements involved to facilitate for a similar research being conducted.

2.3 Source Criticism

Due to time and resource restrictions the selected sample might not reflect a perfect sample of the target population. It will probably contain some frame population errors since the conducted interviews are based on subjective experience and the subject in itself is so broad that the interviewees might only have knowledge covering some extent of the subject. This is always the risk when conducting interviews. To strengthen the reliability aspect both government and company representatives have been interviewed so the opinions from both sides can be mirrored regarding their collaboration and both parties' branding efforts.

To strengthen the case of Swedish country branding in China it has been important to cover the embassy, consulate, chamber of commerce and private sector as well as project managers involved in the work with the Swedish Pavilion at the Shanghai World Expo 2010.

¹⁶ The two terms are used to get an indication of how much the result may differ if the research was to be conducted again

¹⁷ Ibid

3 Theoretical Framework

This Chapter will describe the theoretical framework that has been used as the foundation for the following research and analysis. The author describes which theoretical grounds have been chosen and why.

The theoretical framework for this research report has been approached based on three dimensions. The information has been collected through already existing sources of information as well as the collection of own primary data. The first dimension consists of a discussion on the concept of country branding where secondary data¹⁸ and a qualitative market research has been used. The second dimension is largely restricted to the implications on country branding set on the Chinese market and how Chinese values and expectations can influence the level of success on country branding strategies. The theoretical foundation for this section has largely consisted of primary data through a qualitative market research complemented with secondary sources of data (a desktop research) to strengthen the description of the Chinese market place. In order to better illustrate the subject of country branding, the last dimension is an in-depth analysis of Sweden's presence in China. It was completed with primary data, conducting a qualitative and quantitative market research, as well as using secondary sources of information.

The foundation for this Thesis has been a publication, an Executive Whitepaper, produced by Eastwei MSL on country branding in China that the author of the Thesis has been co-creating. The research method described is therefore a combination of the research done previously and research conducted to further deepen the analytical dimension of the Thesis.

3.0.1 Outline and Disposition of the Study

- ✧ Chapter 1: Introduction
- ✧ Chapter 2: Methodology
- ✧ Chapter 3: Theoretical Framework
- ✧ Chapter 4: The Concept of Country Branding
- ✧ Chapter 5: Country Branding in China
- ✧ Chapter 6: The Shanghai World Expo 2010
- ✧ Chapter 7: Country Branding Applied by Sweden
- ✧ Chapter 8: Discussion
- ✧ Chapter 9: Relevance and Future Suggestions

3.1 Theory

3.1.1 Desktop Research

Desktop research has been conducted continuously throughout the research to; serve as a compliment for the discussion on the concept of country branding where focus has been on published reports discussing country branding, regional branding and other related concepts. The aim has been to support findings and strengthen arguments based on personally drawn conclusions and fill gaps of information to complement interviews.

3.1.2 Country Branding Experts

Country branding is a subject where a large part of the expertise is concentrated to a small group of individuals to which others refer in their research. Being a young concept these individuals have shaped the development of it. For this study three authorities in the area have been chosen to serve as a foundation for the chapter *The Concept of Country*

¹⁸ Desktop research has been done on published material by authorities in the area

Branding, namely Wally Olins, Simon Anholt and Philip Kotler. An in-depth interview has been made with Mr. Wally Olins.

3.1.2.1 Simon Anholt

Simon Anholt is considered, in the field, to be the main authority within country branding. He works as an advisor for governments and focus on policy-making rather than marketing and communications. He has initiated the Anholt-GFK Roper Nation Brands Index that is recognized worldwide.¹⁹

3.1.2.2 Wally Olins

Wally Olins is the most experienced authority in the field of country branding and has written several books on the subject. He has worked with numerous cities and countries, developing their brand identity. He is currently Chairman of Saffron Brand Consultants.²⁰

3.1.2.3 Philip Kotler

Dr. Philip Kotler is a Distinguished Professor at the Kellogg Graduate School of Management, Northwestern University. He is recognized as the expert on strategic marketing worldwide and has written the book *Marketing Management* that is recognized as the most important book in the field.²¹

3.1.3 In-depth Interviews

In-depth interviews have been conducted using a qualitative interview questionnaire. The questionnaire has been adjusted depending on if the interviewee is representing a government body or a company. See Appendix 1 for the two interview guides that have been used.

13 countries have been covered in the study, representing all continents with the exception of Oceania. The countries included are the following; Canada, Chile, Finland, France, India, Indonesia, Israel, Malaysia, South Africa, Sweden, Switzerland, the UK and the US.

Note: the quotes that have been used from these interviews are not individually referenced and might have been complemented through other sources than the ones stated below. This is to maintain a level of confidentiality.

The interviewees that have been chosen have preferable had a position similar or equal to:

- ✧ Ambassador or First Secretary
- ✧ Works within trade/tourism/economic section at the embassy
- ✧ Consulate General
- ✧ Works at a Council, e.g. the British Council
- ✧ Involved in Project Management or Responsible for Concept Theme at the Expo, e.g. Exhibition Project Manager of the Swedish Pavilion
- ✧ Works with Corporate Branding
- ✧ Works with Corporate Communications & Brand
- ✧ Chairman/CEO
- ✧ Works within Sales/Marketing

¹⁹ Markessinis, 2008-12-31

²⁰ Ibid

²¹ Kotler Marketing Group, 2010

3.1.3.1 In-depth Interviews Executive Whitepaper

Eldan, Jackie, Consul General Israelic Consulate

Elliott, Carma, Former Commissioner General of the UK Pavilion and Executive Director China, Half the Sky

Flury, Seraina, Head of Staff Office, Presence Switzerland, Federal Department of Foreign Affairs

Greenwood, Kevin, Chairman & CEO, Wordplay China Inc.

Khumalo, V.M, Consul-General South African Consulate and Former Commissioner General of the South African Pavilion

Lestari, Puji, Press Officer and Spokesperson, Indonesian Embassy

Ling, Mary, Former Director of Communications of the US Pavilion

Liu, Richard F., President CR In TV Media Technology, CIBN

Matamala O., Gonzalo, Commercial Attaché, Chilean Embassy, Fundación Imagen de Chile

Naidu, K. Nagaraj, First Secretary Economic and Commercial Section, Indian Embassy

Tennant, John, Director of Sales, Smartphones and Gadgets, Intel China

Way, Wong Chong, Education Attaché, Embassy of Malaysia

Wisla, Matthew, Vice President of Communications, American Chamber of Commerce China

Withmer, Killian, Swiss Consulate

Zhiang, Cindy, Communications Manager, Stora Enso China

Yue, Fu, Government Relations Director, Carrefour China

3.1.3.2 In-depth Interviews Thesis

Banian, Behdad, Head of Brand Management, Ericsson

Harborn, Mats, Chairman, Swedish Chamber of Commerce in China

Hermansson, Kenneth, CEO, Wayne's Coffee China

Jiang, Lanshi, VP, Corporate Communications & Brand, Volvo Group China

Lembre, Carin, Exhibition Project Manager of the Swedish Pavilion and Project Leader Springtime

Linnér, Per, Second Secretary Economic Section, Swedish Embassy

Olins, Wally, Chariman Saffron Consultants and Co-founder of Wolff Olins

3.1.4 Quantitative Survey

The quantitative survey has been sent out to Swedish people within the network of the author, which means it is not representative of a cross-section of the average Swedish citizen. However, the main purpose of the survey was to get an idea about Swedish people's perception of Sweden, and to be able to benchmark the result against the message that the Swedish government wish to communicate. In total 74 people responded to the survey.

4 The Concept of Country Branding

The discussion regarding the concept of country branding serves as a foundation for the analysis so that the reader is familiar with the subject and the definitions used.

4.1 Introducing Country Branding

Country branding is a multidimensional concept that aims to capture the value and essence of a country's identity and the attributes it is associated with.²² A country brand is holistic; a successful brand should go beyond the sum of its parts. It is about identifying the opportunities for a country to create a competitive image based on the many dimensions that constitutes a nations identity. A country's brand is not governed by trends but should rather be portrayed as coherent and stable, achieved through long-term commitment.

A brand is changing according to what's in fashion, and is therefore very volatile and unstable. When referring to the brand of a country on the other hand one cannot ignore the foundation of its true identity, deep and intrinsic, that is governed by its history, geography and culture etc. There will always be aspects of a country brand over which the country itself has no control, product brands on the other hand can be altered much more easily.²³ For this reason, Anholt argues that the national image is more of a fixed asset rather than a fluid attribute.²⁴

The global competition has changed and so has the means with which one has to compete. A country's brand can be explained as the intangible assets of a country that goes beyond dimensions such as geographical size, trade, global awareness and tourism attractiveness etc. If successful it will generate goodwill and increase investment and trade opportunities including corporations, people and products.²⁵

4.1.0.1 Beyond Functionality

Branding began with the branding of products. Initially the brand of something was described using tangible attributes that was unique compared to competitors. In 1997, Kotler provided a classic definition for product branding as "a name, sign, symbol, drawing, or a combination of all these, whose main purpose is to identify the product or services of one company, and to differentiate them from those of competitors".²⁶ Through this definition, Kotler reflected the branding principles of that time. Today, the concept has developed to include the abstract attachments that a brand has and include countries. Since Anholt established the term nation brand in 1996²⁷, the concept of a brand has evolved into being less functional, relating to intangible attributes and associations that arise in the context of a brand. Rather than expressing obvious advantages of a brand one appeals to the emotional desire of its target audience²⁸. The brand concept has moved beyond functionality. There have been many attempts but the term lacks a clear definition. Country branding is too dependent on each individual case;

The most important single thing about country branding is an idea and coherence, to have a single idea, which is real, which is yours and nobody else has got and then expressing it coherently through everything that you do'

– Wally Olins

'Une marquee est par definition très volatile, soumis à lair du temps est lié à la mode. Alors que l'image d'une marquee peut changer, se voir modifier, être transformée à l'infini, et à l'envi, l'image de marquee d'un pays ne peut guère ignorer les fondamentaux de son identité réelle, profonde et intrinsèque'

– Pascal Beucler

²² FutureBrand, 2010-11-19

²³ Beucler, 2010-12-11

²⁴ Anholt, 2008-12-19

²⁵ FutureBrand, 2010-11-19

²⁶ Đorđević, 2008-10-13

²⁷ GfK America, 2010-05-18

²⁸ Baker, 2011

it is governed by the history of the country, political structure, the perception of the destination country and much more.

Based on opinions uttered by authorities in the field, a brand can be interpreted as a promise of something that corresponds to a country's national identity that will, if successfully communicated, attract business and investment to the COO. A country has to identify its national identity and see how this is unique compared to its competitors and leverage this as a competitive advantage.

4.1.1 Identify What Makes You Unique

It is very difficult for authorities within a country to decide what national attributes can be turned into a competitive advantage²⁹. This also applies to citizens inside the country as well as for outsiders to determine what the identity of the country is. It really has to be a joint effort between all stakeholders mentioned above, where one has to benchmark the country against other countries and identify what they have in common with them and more importantly what their differences are.

4.1.2 Using Stereotypes

If countries or companies can benefit economically, or in any other way, by leveraging their history or culture they will. Especially companies in an industry correlating to the attributes that a country is known for will highlight their national identity.

At times it can be more efficient to leverage stereotypes about a country if the goal is just to create a positive perception. Even though stereotypes are true to some extent; Sweden is clean, France luxurious and Italy fashionable they are simple, do not contain a country's national identity and these stereotypes alone do not generate a strong country brand that will generate economic benefits across all dimensions but rather specified to one industry.

4.1.3 Regional Branding

Regional branding is in today's competitive climate just as important as country branding. Especially larger countries experience huge regional differences both when it comes to cultural values and economic situation etc. Cities such as Shanghai, London and Paris are struggling equally as their nations are struggling when it comes to establishing brand strength, even though it occurs on other premises.

As with countries, if a city or a place can have a clear conviction of the identity and can co-ordinate policies, branding efforts, investments and communication of its identity the potential of successfully creating a strong city or place brand that is well-received both internally and externally greatly increase.³⁰

Overall, a country will benefit from having several different regions or cities with strong country brands since they all help increase the attractiveness of the whole.

4.1.4 Country Ambassadors

The globalization not only changes the global competition but also affects the lifestyle of people. Country borders are becoming less apparent as more people move abroad and

"Simply put, a brand is a promise"

- Walter Landor

"A nation's identity should stress a reality that resonates with people, both within and outside the country"

- Anholt

"A brand, as the clear, highly visible manifestation of a country or a corporation, is as much an invitation to complain — indeed, a target for grudges — as it is a guarantee of quality... The higher you raise people's expectations with a brand, and the more you invest in making big public promises, the greater the disappointment when you fail to keep them"

- Anholt

'Countries branding themselves are all to do with affirmations of historical identity, either real or invented, but then there is a new dimension and this dimension is globalization and that means that people are now beginning to compete with each other, not just in terms of romantic or nationalistic or patriotic or whatever-you-want-to-call-it-ideas but they compete with each other in economic terms.'

- Wally Olins

"Most people in most countries are like most people in other countries"

- Wally Olins

²⁹ Olins, Interview, 2011-05-19

³⁰ Anholt, 2008-12-19

move several times during their lifetime. With a nomad lifestyle attributes such as a high quality of life and economic stability makes countries attractive living options.³¹

Increasingly these global citizens help to project the image of the COO's country brand and this can be leveraged by the country itself, given that there is a clear sense of what its national identity consists of. Otherwise, the result might be that stereotypes are strengthened since it is easier to project a known stereotype than trying to self-assess what distinguishes oneself from others.

People living abroad often develop a strong sense of national pride and a strong emotional attachment. If they have a good sense of what is unique with the COO they can help to spread the country message on an individual basis.

4.1.5 English as a Global Language

Even though fair competition is given by languages such as Spanish and Chinese in terms of volume, English remains the official language for business worldwide. Countries that are native English-speakers can therefore benefit from their native tongue and leverage this in their country branding efforts, especially from an immigration perspective.

4.1.6 Indexes Measuring a Country Brand

The strength of a country brand is subjective and is largely depending on the context in which it is placed. A country brand can only be defined by benchmarking against other countries' brands. Below is a description of two Indexes that measures the perception that other countries have of the COO as well as scoring the strength of a country's brand. These are in no way scientific but behind both models lay extensive research.

The Anholt – GfK Roper Nation Brands Index is an Index published every year and illustrates what different countries' perceptions are of each other based on 6 categories; people, tourism, exports, governance, investment and immigration, culture and heritage. For more information see Appendix 2.

Another Index that is relevant in this context is FutureBrand's Country Brands Index that scores countries, in the 2010 Index 50 countries are ranked, based on the following 6 categories; awareness, familiarity, associations, preference, consideration, decision/visitation and advocacy. For more information see Appendix 3.

According to Kotler branding has to be transformed. Due to social media and online communication channels branding has to become a story. Branding has to have depth and compelling attributes. He argues that advertising is changing from traditional branding to Narrative branding³². Today, countries branding themselves need to arouse emotion and desire among its audience. Kevin Roberts, CEO of Saatchi and Saatchi, says that to create a strong brand, what he refers to as a Lovemark, there are three key aspects; arousing emotion since emotional thinking leads to action, creating value by creating mystery through storytelling and be intimate to show that the target audience is understood³³. These principles, although intended for products, can be applied to the strategy for branding countries. They are all directed to the emotional associations

³¹ FutureBrand, 2010-11-19

³² Kotler, 2009-04-22

³³ Roberts, 2011-04-29

consumers have, often associated with an irrational loyalty to strong brands, such as Coca Cola.

A strong country brand is equivalent to a brand that makes people's lives better, creates emotional desire and demand, is consistent across all touch-points, gives a point of view on the future, drives the world forward and generates economic performance and power. These are all subjective attributes that are difficult to measure.³⁴ So how can one decide if a country does have a strong country brand, and if so, on what markets? A country that launches extensive efforts to strengthen its brand; employing professionals, do continuous evaluation and communication strategies will experience strong economic results.³⁵

If a country scores well on several Country Brands Indexes, is that a sign that it has a strong country brand or simply that it successfully persists to live on old stereotypes? Of the countries included in the research leading up to this Thesis the countries that rank top 6 according to Anholt's Index are as follows; Switzerland, the UK, the US, France, Sweden and Canada. These countries are all included in the Top 10 of FutureBrands country index as well. This suggests that in the dimensions measured by the two Indexes the countries mentioned above have positive perceptions worldwide which in turn would indicate strong country brands. However, this perception is a global average and the individual perception for each dimension and for the perceptions in different destinations differs. Sweden in the UK has different brand strength than Sweden in China, in total but also in separate dimensions. China rank Sweden high in aspects such as governance and quality of life which is completely different from other countries' rankings of Sweden.

³⁴ FutureBrand, 2010-11-19

³⁵ Interbrand, 2003-09-23 modified (2011-03-22)

4.2 COO Enhanced by Strong Company Brands

4.2.1 A Positive Leveraging Effect

Companies want, to a larger extent, leverage the strong brand of their COO in their marketing which will further benefit the brand of the COO. Since the country brand becomes stronger the companies' brands will as well; it gives companies even more reason to make use of the COO-effect³⁶. A joint co-operation makes it easier to create a unified country message and make sure that all stakeholder objectives are met. This positive leveraging effect is illustrated in Figure 2 and benefits both governmental bodies and the private sector.

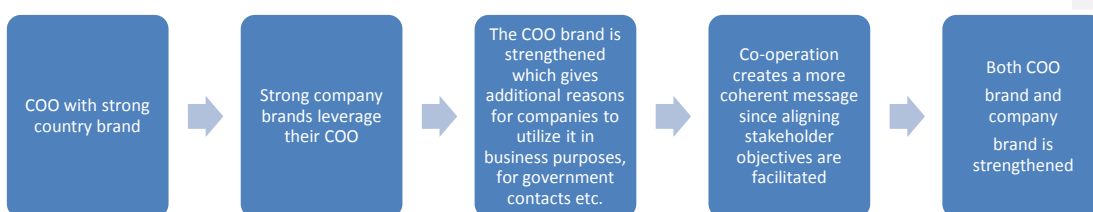


Figure 2 The positive leveraging effect; how the COO and its companies can enhance each other

These effects are achieved step by step. A successful example of this is the Swiss country brand, which benefits from the strong brands of its companies who use the symbol of the white cross on a red background in their marketing. Switzerland is in the lucky situation that it has a very strong brand name already and therefore is required to put less resources (comparatively speaking to other countries) into maintaining their brand. Switzerland also profits from the fact that country branding efforts are reinforced by the effect generated by its companies marketing efforts.

There are examples of when the country brand is stronger than its companies, in which case a joint collaboration has to be approached differently. In Chile's case the country brand of Chile is stronger than the brand of its companies. By using the strength of the country brand and financial resources of the private sector, the company brands are strengthened and through an aligned effort mutual benefits are achieved. Israel is another example of a strong country brand that can be leveraged by its companies.

One approach that has been identified in order to create a strong country brand is to strengthen the national identity by using resources for branding efforts inside the country. Chile and Israel are both small countries with a strong national pride and limited resources. They use this as an advantage in their approach to initiate their branding efforts inside the country and strive towards a joint collaboration between the government and the private sector.

Clearly, the approach to how, and if, a collaboration is carried out differs between countries. If the COO is well-known for an attribute that does not correspond to a company's core competence, or the political relationship does not carry positive associations in the destination country, it might be better initially for companies to carry out separate activities displaying only their own brand.

'If Israel has a good reputation in China it will benefit Israeli companies'

- Israel

'Swiss companies like to emphasize the white cross, every company contributes to, and more importantly profits from, the 'Swissness''

-Switzerland

'Chile does not have many famous company brands why they are trying to bring out the message made in Chile instead to help different sectors'

- Chile

³⁶ The effect that the manufacturing country has on the perception of a product.

If the companies in a country are much stronger than the country brand itself, the companies will have to leverage their country brand first in order to be able to utilize this effect. Korea is a country that has very strong, well-known global brands but where the Korean country brand is less well-known.

The correlation between a country and its companies is strong disregarding the fact whether they leverage each other or not. Jointly, they can both enhance and strengthen each other's brands to maximize the use of resources. In Table 1 below, the key findings for a beneficial use of the COO's brand is presented.

'At Carrefour, we generally don't leverage our COO but if the Chinese government needs support in the development of new policies we emphasize our French background with know-how, case-studies and proof records from France and the EU'

- Carrefour

Key Finding	Situation	Implication
Companies Leverage Attributes Aligned with Their Industry	Countries that have strong associations with certain attributes will benefit companies in an industry that can leverage these attributes, e.g. Swiss watches leverage Swiss precision. Similarly, a strong company brand can be leveraged by its country of origin; e.g. Nokia and Finland enhance each other.	Utilizing these perceptions will enhance and strengthen the brand of the company who leverages it.
Cultural Attributes are Leveraged to Attract Business and Investment	Countries can leverage a popular cultural attribute in one area to leverage business in other areas.	Branding activities become experiences. Can be used by countries with a centrally aligned branding strategy.

Table 1

India has successfully leveraged the fact that the Indian culture is very popular in China. One of the efforts that India initiated in China was a performance with Indian bollywood dance who proved very popular.

Indian Bollywood Show

India utilizes the fact that the Bollywood dance is well-known and popular in China. Even though there are no proof points that activities such as this will enhance the economic collaboration between China and India it is used for soft power projection. They are using a popular attribute, such as this Indian music genre, and incorporate this to create a unique Indian experience, combining business meetings and seminars during the day with performances in the evening, which creates a positive perception among the Chinese people. The activity can be leveraged to promote increased travel between countries that in turn can lead to increased economic opportunities.

'Not all Swedish companies use Sweden in their branding but since Sweden is positively perceived here in China, most of them benefit from that perception'

- Sweden

'In India we are experiencing a trade deficit but in exchange we can offer extensive experience in IT, the Bank of China (BOC) employing TATA IT Consulting is a great example of this.'

-India

The success factors for a country branding strategy depends on two criteria; the initial platform and brand strength and how well the transitions (of creating a strategy true to ones identity and communicating this successfully) are managed.

5 Country Branding in China

5.1 Understanding China

In order to understand the competition that countries face when establishing a presence in China one has to understand the dynamics of the Chinese market and the strong forces that drive it.

5.1.1 China at Large

China is the second largest economy in the world, projected to surpass the US economy in 15 to 20 years³⁷. Although, the GDP per capita in 2030 will only equal a third of that of the US and half of that of the EU, China is already a key market. Today, Chinese output exceeds its domestic consumption, but by 2025 China will have become the third largest consumer market worldwide³⁸. Furthermore, the FDI³⁹ into China is increasing, with a growth last year of 23.4%, as well as the outbound direct investment with a growth of 15.9%.⁴⁰

The Chinese population will continue to grow, with a declining growth, reaching 1.5 billion people⁴¹ in 20 years with an urban population of 1 billion⁴². Furthermore, by 2030 China will house 38% of the global middle class, consisting of 370 million people⁴³.

China recently presented their Twelfth Five-Year Plan. The core in this Five-Year Plan is essentially to transform China's economic model completely. This will be achieved through; transferring the economy from an export led to an import led economy, which will demand a balance between export and domestic consumption; decreasing dependence on foreign high-tech; transforming China into an innovative nation and working towards a low-carbon economy.⁴⁴ This theoretical framework will, according to plan, result in a sustainable society that addresses inequalities and emphasize efforts to promote an equal wealth distribution, increased domestic consumption and improved social infrastructure and social safety nets.⁴⁵

5.1.2 The Party Stands Strong

The influence of the Party in China remains strong even though, from a perspective of information flows, their influence is increasingly challenged. In order for the Party to maintain their influence over China, being a huge country, they emphasize on selecting members for top positions with extensive regional and local experience.⁴⁶ With China's explosive economic development and reforms local officials have gained in power which means that economic drivers are not always aligned and carried out the same way throughout China creating huge regional differences in economic terms.

³⁷ IndustryWeek, 2011-02-14

³⁸ McKinsey d, 2006-11-01

³⁹ Foreign Direct Investment

⁴⁰ China.org, 2011-02-17

⁴¹ Lawrence, 2007-10-16

⁴² McKinsey c, 2009-03

⁴³ Ibid

⁴⁴ China Law Blog, 2011-04-26

⁴⁵ English.news.cn, 2011-04-26

⁴⁶ HSBC China Research, 2010-12

5.1.3 The Chinese Cultural Heritage

The Chinese market place is unique in many ways. Countries need to understand the values and mentality of their target audiences in China. To understand the Chinese market and the mentality of the Chinese people one has to understand their values and the socio-economic effect on these values. There is a divergence in different regions across China where traditional values remain intact in Inland China that converges to become more modernized closer to the more developed coastal regions. However, the heritage from Confucianism and cultural heritage remains throughout China.⁴⁷ Important aspects are the hierarchical business culture, the importance of Guanxi⁴⁸ relationships, the strong ties of family and the importance and priority of education for the only child.

A factor that all companies need to face when entering China is the trust that the COO has from the Chinese government. According to the research, trust is the single most important key success factor. If the government and Chinese companies trust you, they support you. Government support facilitates the dealings with laws and regulations and getting connections to decision makers at the right level for business delegations.

5.1.4 China is Raising the Stakes

The stake for country branding in China is high but it is also necessary. Countries are acknowledging China as a key market and need to organize their country branding strategies accordingly. The Olympic Games was the first large scale event where China showed the world its potential. This was followed by the World Expo held in Shanghai in 2010, the largest Expo in history in terms of economy and size. The Expo provided a platform for the rest of the world to gain exposure and opportunity to create, and strengthen, its presence in China, as well as giving China the opportunity to show the world its potential of becoming the world's largest economy. The Expo will be described in more detail in Chapter 6. All countries in the research view China as a key market and are increasing their investment in China.

5.1.5 The Chinese Consumer

5.1.5.1 Brand Value Rather Than Brand Loyalty

Chinese consumer preferences are diverse and the interest towards foreign brands and companies varies. There are certain attributes that the Chinese, a progressive segment, have in common who are more open to purchasing and supporting foreign brands than others, such as; higher income, looking for higher-end products, brand conscious, well-informed, knows which COO stands behind a brand and interest in the latest fashion and high-tech products. Overall, they are pickier than consumers from other countries and carefully think about their next purchase. The Chinese consumer is not Brand Loyal but rather attracted to Brand Value. It is important for brands to have high Brand Equity, of which Brand Loyalty is a small part, but the value derived from quality and brand-awareness is more important. With the rapid development in China consumer preferences regarding brands change fast. Foreign companies need to apply a long-term strategy to stay true to their own brand identity. For young Chinese consumers trust is the key to stay loyal to a brand. Since the younger generation have grown up with

'We plan to increase our budget for branding efforts in China with 75% during the next 5 years'

–India

⁴⁷ UNIM, 2011-01-16

⁴⁸ Guanxi is a Chinese term, 关系, that can be loosely translated as connections and relationship. It is strongly rooted in the Chinese culture where the personal relationship is very important in business contexts.

foreign brands, just being foreign does not carry any extra value. The product in itself is valued by either being high-quality and premium, since Chinese consumers are both trend-sensitive and safety concerned, or low-priced and directed towards the mass market. The key is to have a clear strategy which means that it is not possible to attract every market segment or for that matter switch between segments.⁴⁹

Brands are connected to status in China but the younger, trendier generation is looking for the individualistic brands and products that are limited and not available to everybody. If a brand is perceived as unique and trendy it will most likely be positively perceived.

5.1.5.2 The Power of Word-of-Mouth

Furthermore, Chinese consumers are very likely to pass on their evaluation to their friends and co-workers, regardless if they are happy with the product or not. In China, peer evaluation is highly trusted and greatly influences a purchase decision and the consumer's perception on a specific brand. The power of Word-of-Mouth, and peer-to-peer communication, among consumers is greater on the Chinese market than on other global markets.⁵⁰ This phenomena can be leveraged as a communications channel to reach a larger market segment.

⁴⁹ Rein, 2007-12-12

⁵⁰ Accenture, 2008-01-17

5.2 Influencing Brand Perception

5.2.1 Declining Government Influence

A country's perception is influenced through first-, second- and third- hand sources. A first-hand source is an experience where a perception can be formed through a visit to the COO itself. A second-hand source is the dialogue with a citizen from the COO, or a Chinese citizen returning from abroad, who talks about his/her experiences first-hand. The second-hand sources are identified by personal interaction. Finally, third hand sources consist of impersonal sources such as traditional and social media, product and company brands, government policy indications and education. Social media is developing towards a second hand source through the increasing personalized online interaction.

5.2.2 Personal Experience

It is only recently that Chinese people in general have had the opportunity to travel abroad, for vacation, studies or business, and form a country image based on their own first-hand experiences. Chinese tourism will continue to grow with approximately 10% annually⁵¹ and is expected to capture 8% of the total tourism industry market share in 2020⁵². Furthermore, with the growing middle class (by 2030 China will have 38% of the global middle class) studying abroad and going on vacation is no longer exclusive to the upper class.

5.2.2.3 English as a Global Language

As described earlier English is accepted as the official language when it comes to business. This fact is recognized by the Chinese, and given the low average language level in China, fluency in English is still highly sought after. The key finding is presented in Table 2. If the opportunity is given many Chinese send their only child to study abroad preferably in the US, the UK, Canada or Australia. These countries therefore have an initial competitive advantage in China when it comes to country branding.

Malaysia is a country that leverages the fact that English-speaking countries have a competitive advantage. They aim to attract Chinese students by offering a cheaper alternative for studies abroad compared to other Western countries. They offer a quality education in an environment where people speak both Chinese and English apart from Malay. They have developed a program that gives foreign students two certificates that give them the qualifications of a Malay University as well as a partnering university in, for example, the UK.

Twinning Program

Malaysia has developed an educational program called the Twinning Program. Essentially, the program ensures that 3 years of studies in Malaysia equals 3 years of studies abroad at certain universities in the UK, Australia etc. When the student graduates he/she will receive two certificates, one from the Malaysian university and one that certifies that the studies are equal to that of the partnering university. Malaysia has two competitive advantages with this offer; firstly it is not as costly as native English-speaking equivalents and secondly, being a former colonial country their level of English is good in addition to Malay and Chinese language knowledge.

⁵¹ Ocn.com.cn, 2011-06

⁵² , Tauber, 2010-11-30

Key Finding	Situation	Implication
Competitive Advantage for English Speaking Countries	There is a growing trend of Chinese people going abroad for vacation, studies or business where English-speaking countries are preferred. The US will experience an increase reaching 2 million Chinese visitors in 2015 ⁵³ , in Australia; China has surpassed the UK as the most valuable tourism market ⁵⁴ .	Chinese people can increasingly create their perception of a country from first-hand experiences and with that, countries have a bigger influence on their own country brand.

Table 2

5.2.4 Increased Immigration to China

One can see that countries start to realize the opportunity of second-hand sources of information. The immigration of non-Chinese people to China is increasing. There are examples of countries creating their own networks among their citizens living in China. These citizens help promote and strengthen the country brand.

5.2.5 Country Ambassadors

During the last decades China has opened up greatly and the global citizen that was discussed earlier increasingly enters China. They can communicate the brand of their COO on a personal basis retelling their personal experiences. This channel for communication is growing when consumers increasingly turn from traditional promotional campaigns and look for a more personalized approach. Furthermore, the nomad lifestyle can today be applied to the Chinese as well.

5.2.6 Traditional Third Hand Channels in China

Traditionally, third hand sources have been the only channels available and as such very influenced by the government, unlike in Western countries where first- and second-hand experiences have been much more available. Furthermore, government relations have been superior to all information channels that cannot be experienced first- and second- hand. Strong government relations remain important; the government is present in every large corporation and university, and they favor Chinese companies over foreign companies. When foreign companies have a Chinese partner it will increase their legitimacy and facilitate gaining government support and get access to Chinese networks.

'Chile has organized a network of relevant Chileans and 'friends of Chile' living in China, in order to support and enhance promotion efforts. Chileans are used as country ambassadors to promote their country'

- Chile

'Without a Chinese business partner you will not get invited to tenders'

-India

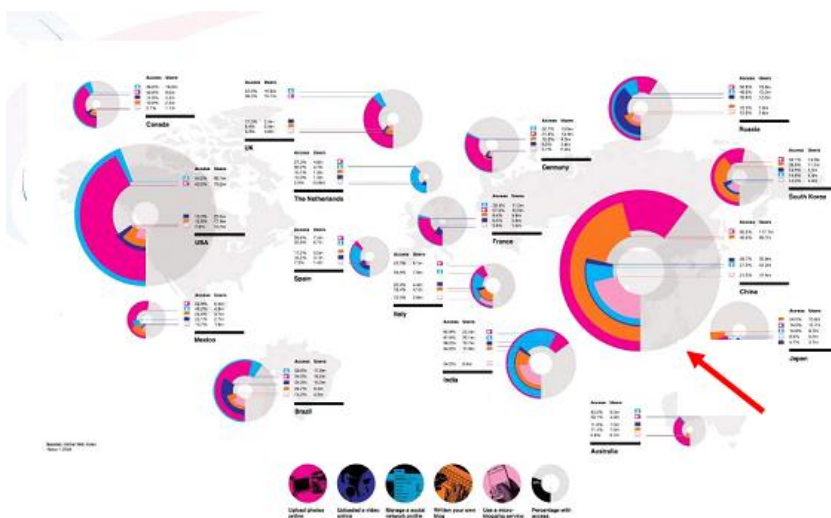
⁵³ ChinaTravelTrends.com a, 2010-12-23

⁵⁴ ChinaTravelTrends.com b, 2011-03-11

5.2.7 The Impact of Social Media

Even though Guanxi relations, in traditional media, are still important to get positive media exposure the internet has challenged the level of government control. This is true for social media, which is more important in China than in the rest of the world. Chinese social media usage is illustrated in Figure 3 and shows that the Chinese are among the most active globally. Social media channels in China (QQ, Sina, Youku etc.) are Chinese equivalents to Western social media (Facebook, Twitter, Youtube etc.) since these are banned in China.

'We used Chinese social media to attract and engage Chinese people, at one time we had them come up with a nickname for the British Pavilion'
 – the UK



Chinese social media users are amongst the most active globally

Figure 3: Chinese social media users

Key Finding	Situation	Implication
Underutilized Social Media	The potential of social media is realized, but to a small extent utilized. Social media activities are initiated in relation to a larger event but are then not continued.	To become successful in the usage of social media it has to be continuous and active. There has to be an on-going dialogue to engage target audiences.

Table 3

How can this online space be deployed in branding strategies to leverage peer-to-peer communication in order to increase trade and investment? In China social media is a huge market and it is the channel through which netizens⁵⁵ are reached, a growing target audience. In the research it appeared that there are few countries that utilized online branding activities continuously although almost everyone expressed awareness of its increasing importance. One country that has been successful in its efforts is the UK; engaging Chinese people in online activities such as competitions, shared success stories and interaction through micro blogging. Potential reasons to why this factor is not utilized more could be derived from lack of resources or lack of knowledge on how to leverage the opportunity while avoiding the risks involved with social media. There is an increased level of risks since the information flow is more difficult to control. The finding is presented in Table 3.

'Our blog on QQ at one stage had 600 million interactions during the Expo'

– the UK

Yet another reason that emphasizes the significance of country branding in China is the growing importance of communication channels less controlled by the government presented in Table 4. The biggest growth increase will be generated by social media and the tourist sector. This development highlights the fact that countries, to a much greater extent, can influence the perception of themselves in China despite the strong governmental influence.

Type of Source	Growth Trend
1st Hand Sources	
Tourism	Increase
Studying/Working Abroad	Increase
2nd Hand Sources	
Immigration to China	Increase
3rd Hand Sources	
Traditional Media	Stable
Social Media	Increase
Product/Company Brands	Increase
Government Policies	Stable
Educational System	Stable

Table 4

5.3 Stakeholder Communication

From the research the conclusion has been drawn that almost all countries try to create a universal brand message. A brand message identifying their core values which is then adapted locally to better attract the target audiences in the destination country. 100% of the countries are making adjustments, presented in Table 5, to meet the very different cultural setting on the Chinese market. When asked about the biggest challenges for country branding in China this was mentioned as the number one: to be successful in getting the Chinese target audiences to perceive the message as desired.

5.0.0.3 A Promise to Deliver

The abstract definition that a brand is a promise gives a good indication of what requirements that are placed on a branding strategy. A promise means delivering something and meeting expectations, the national identity has to have substance behind it. To gain the support of the government or the trust of the Chinese, a brand strategy has to be able to deliver through actions; actions that link together government bodies, business, cultural sectors, educational system and media etc⁵⁶.

Key Finding	Situation	Implication
Adaptation of a Global Country Message	Most countries try to create a universal country message where their core values are identified centrally. All countries are making local adaptations to the Chinese market to communicate their country message. There is a difference in how much each local representative is allowed to alter the message.	Due to the unique market in China countries have to adapt their country message to better correspond to Chinese cultural setting and values.

Table 5

⁵⁵ The large online community of younger Chinese consumers that spend a great deal of their time on the Internet actively taking part in social media activities.

⁵⁶ Brymer, 2004-04-19

The strategy of a country brand, with the one exception being the US, is defined in the COO. In order for the brand strategy to become the perception of the country, it has to be communicated to several different stakeholders on several different levels. The COO has to approach different target audiences, illustrated in Figure 4; the Chinese government, media, Chinese companies, the general public, special interest groups, influencers etc. to create a coherent country perception.

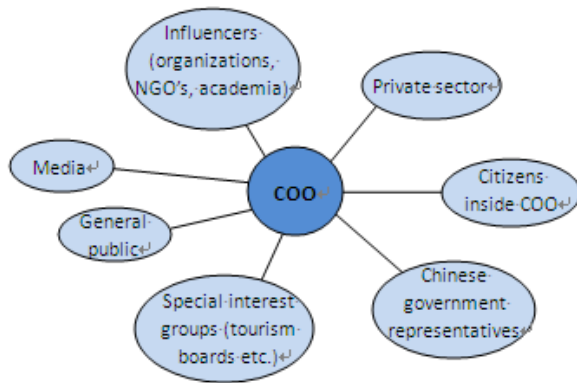


Figure 4 Communication channels

5.3.1 Brand Communication Levels

A country branding strategy can be applied most efficiently when the country branding efforts are aligned and there is an existing dialogue between a branding organization in the COO and COO representatives on the Chinese market. To be successful the country message has to be communicated on several different levels. These include the government of the destination country, the private sector and the citizens of the destination country, illustrated in Figure 5, through different channels to reach all stakeholders described above. The COO needs to approach people on high governmental levels, Chinese companies and companies from the COO as well as specific individuals. Today, the people inside a country are a great resource for spreading the message further. The COO can utilize their own citizens to spread the message to Chinese individuals on a peer-to-peer basis.

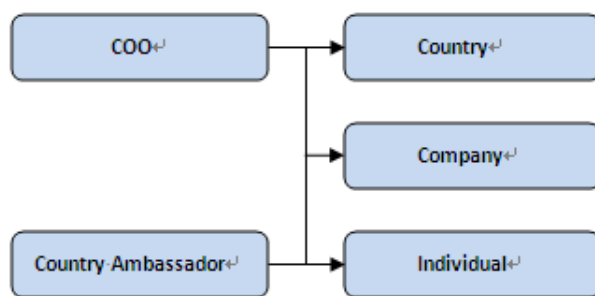


Figure 5 Communication levels

One has to consider the fact that the destination country greatly affects the platform on which a branding strategy is formed. Sweden’s branding strategy communicated in Scandinavia, where people have probably already visited Sweden and are knowledgeable about the country, is vastly different from the branding strategy that is needed for the US or China. In contrast to the increased globalization, stakeholder communication is still very much influenced by the geographical location of the COO and the destination country.

5.4 Creating a Strong Country Brand

A country brand is subjective. The perception of a country brand is based on a combination of personal and collective opinions that take a long time to build up and a long time to change. It is created through our history, is leveraged today and impacts our future. Subconsciously our perceptions of a country consist of clichés and stereotypes. Country branding is also a concept that is created based on influences from personal experiences together with the collective mentality of one's country of origin. Time and the relationship between personal and collective perceptions are essential when developing a branding strategy.

5.4.1 The Country Brand in Motion

Many countries in China find themselves stuck in stereotypes which can either strengthen their country brand or weaken it. Depending on the current perception in China, countries are trying to maintain their image, elevate it or renew it.

One of the first impressions of a country is given in school, which creates a platform from which other impressions are added. Later on perceptions are formed based on impressions experienced through the first-, second-, and third- hand sources discussed previously.

In the research it was identified that countries that are satisfied with their country brand try to elevate it and enhance the perception of it in China or in some cases maintain it. Countries that are not happy with their image try to change it and renew their brand completely. They are all aware of the importance of an established presence on the Chinese market. Countries that experience resource restraints in their efforts to develop the brand will at least try to maintain the perception of it. The findings are presented in Table 6.

'The perception of the UK in China is the polite Englishman with honor and integrity. Partly, we wanted to keep that, and add to it, since, especially during the economic crisis, these are good attributes for a business partner'

–the UK

'We aim to move away from stereotypes, we want to convey our country as modern, with a developed infrastructure, skilled manpower and international outlook to offer a good investment environment'

–South Africa

'Overall Chile has a positive perception. Chinese schools have textbooks that refer to Chile as a beautiful country, furthermore in Chinese the two characters for Chile are positive so people generally have a good first impression'

– Chile

Status				Action	Case Study
Content Perception	with	Country	Brand	Elevation Through Rebranding Countries try to elevate the perception of their brand by developing it. They can incorporate new attributes or elongate old ones.	<ul style="list-style-type: none"> Switzerland: Switzerland wants to develop the perception of precision, clean air, tourist destination and finance to include sustainable technologies and high-tech attributes. Israel: Israel is happy with their brand in China but want to elongate the attribute of them from being smart to being creative. Being creative includes both being smart and innovative.
				Maintaining <ul style="list-style-type: none"> Countries that are content with the perception they have in China and only engage to maintain the image. Countries with the intent of elevating their brand but that are held back, e.g. by resource restraints, remain at a level at which they retain their brand. 	
Discontent Perception	with	Country	Brand	Change Through Rebranding Countries that experience a negative perception or a perception that fail to correlate to their identity rebrand their image entirely.	<ul style="list-style-type: none"> South Africa: South Africa has rebranded themselves completely going from an old version to a new modern South Africa. They have leveraged large sporting events such as the World Cup to illustrate their new image.
				No Action The research did not come across a country that did not realize the importance of creating a strong country brand in China.	

Table 6

5.4.2 Targeted Branding in China

How can countries create a sustainable presence in China? China is changing fast and this high-speed change results in a sense of fragmentation. Even though China will become the largest economy in the world in 20 years, its GDP per capita in 2030 will reach USD 15 500, equal to only a third of the GDP per capita in the US and less than half of that in the EU. The reason for this is that regions within China have very different economic development and their GDP differ greatly. Regions are developing unique sets of values and expectations which clearly dictate the importance of regional and local knowledge in China. Table 7 presents the finding on targeted branding.

Figure 6 and 7 illustrate the economic development in China in 2009 and 2020 respectively by comparing local Chinese regions to a country with a corresponding level of GDP per capita, emphasizing the importance of regional and local knowledge when developing a branding strategy for China. In 2020 the GDP of China's regions will to a great extent resemble the GDP of developed countries rather than developing countries. For more detail see Appendix 4

Figure 11: 2009 GDP per capita by province: China ranks 99 in the world, still behind Albania at 96, despite 30 years of rapid growth



Figure 6 GDP per capita by province in China 2009

China GDP per capita 2020 (projected) by province: some may join the likes of Hong Kong and UK



Figure 7 GDP per capita by province in China 2020

Segmentation is experienced between rural and urban areas, different geographic areas as well as within demographic factors.⁵⁷ The country message that is communicated needs to attract these different clusters and segments, and have to appeal as much to the Chinese audience as it is considered relevant to the COO.

Key Finding	Situation	Implication
2nd Tier Cities Still First Mover Advantage	All countries plan to expand to 2 nd tier cities. For these cities the country message could be targeted for a more focused group; e.g. trade and investment in Tianjin and Chengdu and tourism in the richer areas of South-East China. Countries generally experience a lack of resources for further expansion. Furthermore, for a first-time visit in China people prefer to visit 1 st tier cities to 2 nd tier.	The competition is fierce in 1 st tier cities; there is still a first mover advantage to be achieved when targeting 2 nd tier cities as this market is less crowded. Arriving with a delegation can receive more attention and make it easier to reach people at the right level.
COO has to Consider Regional Branding in China	China cannot be targeted purely through a dual approach. Values and attributes are not only divided between 1 st and 2 nd tier cities but through regional clusters across China, that share the same values and expectations.	Countries/Companies need to have extensive knowledge of local variations for different regions in China and which cities are considered to be 'trend-setters' within each cluster.
Regions in COO Individual Branding Efforts	The COO usually has several regions that have attributes setting them apart from the COO and that want to brand themselves individually in China.	The COO has more opportunities to brand itself and the regions can help develop the country brand and elevate it.

Table 7

5.4.3 Collaboration in China

In China both companies and government bodies can benefit from utilizing the positive leveraging effects described earlier. With the co-operation of companies the COO's brand is strengthened. Especially in China, government relationships are essential and by leveraging the strengthened country brand, companies can get access to Guanxi contacts when it comes to diplomatic issues and business relationships. It is important to be familiar with the Guanxi concept to understand the rules of competition. A foreign company competing on a local market will meet increased competition due to political relationships between local Chinese companies and the government. The strategy highlights a potential that is not fully utilized among companies and countries present in China today.

Is China becoming too big? It can be questioned whether countries should aim to establish a presence in all of China. The country is increasing, not in size, but in terms of sheer volume in all aspects. Today there are 600 urban centers worldwide that provide

'Switzerland has a special situation where the country brand of Switzerland is very strong, and companies as well as Swiss provinces benefit from this brand to market their own events as 'Switzerland events' or events that have a strong link with Switzerland'

– Switzerland

⁵⁷ HSBC China Research , 2010-12

60% of the GDP. In 2025 the amount will be the same but these urban centers will have changed drastically. It is estimated that 136 new cities will be added and that out of these 136, an astonishing 100 will come from China⁵⁸. The sheer size of the market makes it so much more difficult for a country to establish a presence and decide where to focus its efforts.

Countries can increasingly influence their own country brand in China. The biggest growth will be generated by the tourism sector and social media.

⁵⁸ McKinsey b, 2011-03

6 The Shanghai World Expo 2010

This chapter will give a presentation of the World Expo held in Shanghai in 2010 and analyze challenges that arise when participating in large branding events.

6.1 China Showing Off

The Olympic Games was the first large scale event where China showed the world its potential. This was followed by the World Expo held in Shanghai in 2010, the largest Expo in history in terms of economy and size. The Expo, with the theme 'Better City, Better Life', provided a platform for the rest of the world to gain exposure. It provided an opportunity for countries to create, and strengthen, their presence in China, as well as giving China the opportunity to show the world its potential of becoming the world's largest economy. China wants to illustrate that it has the capacity to become a center for the world economy as well as a strong consumer market and a driving force in international competition.

The competition, to be noticed in China, when it comes to financial means is uneven among countries. This became evident at the Expo where the total sums spent at each pavilion varied greatly; from smaller countries with a budget of approximately USD 18 million to larger countries spending as much as USD 60 million.

6.1.1 Challenges to Address

An event such as the Expo provides a range of challenges for a country trying to promote itself. On an area as small as the pavilion the country has to fit its whole national identity. A theme has to be chosen that can be applied to all core values and that translates well to a Chinese visitor.

Furthermore, the pavilion has to attract target audiences with very different preferences; the Chinese government is looking for proof-points of strengths in environmental technology and innovation and socio-economic factors; Chinese business representatives are looking for viable business partners and investment opportunities; and the general public is more attracted by famous tourist attractions, giving them a sense of being abroad.

In order to create a sustainable presence and to reach out to the general public, including the Chinese people that cannot physically attend the event, an opportunity to engage the online community and getting them involved in their pavilion is through online competitions and sharing of success stories. The UK is a great example of a country that was very successful in their online branding efforts, and still are today, 6 months after the Expo has ended. They have managed to change the perception of the UK into a more creative one and have received attention in China thanks to their online branding efforts. For most countries however, these efforts were not sustained after the Expo finished.

Even though smaller countries have smaller budgets than larger countries the majority experience resource restraints. The implication is that governments are put in the position in which they are dependent on funding from the private sector. They need to strive to find a balance between maintaining a country brand free from commercial messages while at the same time meeting the objective of the private sector and potential stakeholders.

The Largest World Expo in History

The theme of the Expo was 'Better City, Better Life' where most countries chose to incorporate sustainability in their themes. In total over 73 million people visited the Expo in Shanghai and 250 countries and international organizations. Countries participating at the Expo could choose from an exhibition area of either 3000 m² or 6000 m².

Challenges

- for Large Country Branding Events

The whole essence of a country in a small exhibition area

Attracting distinctly different target audiences simultaneously

Staying objective while promoting business opportunities

According to the research the majority of the pavilions at the Expo were financed jointly by both the government and the private sector. A country brand should be objective and the challenge at larger events is to align the country brand strategy with the objectives of individual companies. The pavilions have to provide business opportunities and represent its companies while at the same time refraining from becoming too commercial.

6.1.2 Ideal Collaboration Strategy

A country's brand strategy can be decided by its government and/or private sector and financed to different degrees by both. For the outcome to be successful at larger events, such as the Expo, it is important that branding efforts are well organized. This is true not only for activities but the branding strategy platform in general. Approaches for defining a brand strategy are evaluated in Table 8, 9, 10 and 11 on the following page.

Based on how interviewees perceive their own situation in China, their COO's potential and what has proven successful, the conclusion from this research is that ideally, a country's branding strategy is developed through joint collaboration between the government and the private sector. Initiatives come from both parties but are ultimately decided by the government. Financing is done jointly to make sure that the objectives of all involved stakeholders are met. As mentioned previously there are successful examples when activities are sponsored by only one party only as well. This is dependent on having a very strong COO brand or company brands. Finally, one department is appointed to be responsible for larger country branding activities, such as the Foreign Ministry Office, a Marketing Council or similar.

'How can you get your message across in China with a limited budget? We spent a lot of time working with focus groups in China about how the UK was perceived, and people's aspirations in regard to the UK. This helped to focus our objectives and our program for the Expo for maximum impact'

- the UK

Brand Activities Financed by the Government	
+	-
Increased Transparency	Unutilized resources in terms of financial means
Facilitate to maintain an objective country brand, no commercial objectives	No alignment between the government and the private sector

Table 8

Brand Activities Financed by the Private Sector	
+	-
Increased utilization of resources (additional financing available)	Countries need to find a balance between receiving funding from the companies, the companies' objectives and the brand image of the country. A country brand should not be commercial but rather seen as objective
More initiatives give increased exposure in more areas given that companies advertize their COO	No alignment between the government and the private sector

Table 9

Brand Activities Decided by the Government	
+	-
Easier to create a coherent message. Less stakeholder objectives to align	Objective of the private sector might not be considered, goes against that branding activities aim to generate business
Easier to appoint one project leader, either individual or organizational	No alignment between the government and the private sector
Communication channels at government levels easier to establish, or already established	

Table 10

Brand Activities Decided by the Private Sector	
+	-
Targeted message for a targeted audience.	Many different objectives that might be difficult to align. Portrayed brands speak of the company rather than the COO
Existing communication channels to end-users/ business partners	No alignment between the government and the private sector

Figure 8 displays the approach for how country branding strategies are developed. The most common approach is for the government to be the ultimate decision maker⁵⁹ and the financing to be the result of joint efforts from both sectors, but with a different degree of involvement. In general, the branding strategy is driven centrally, starting in the COO with local regional adaptations.

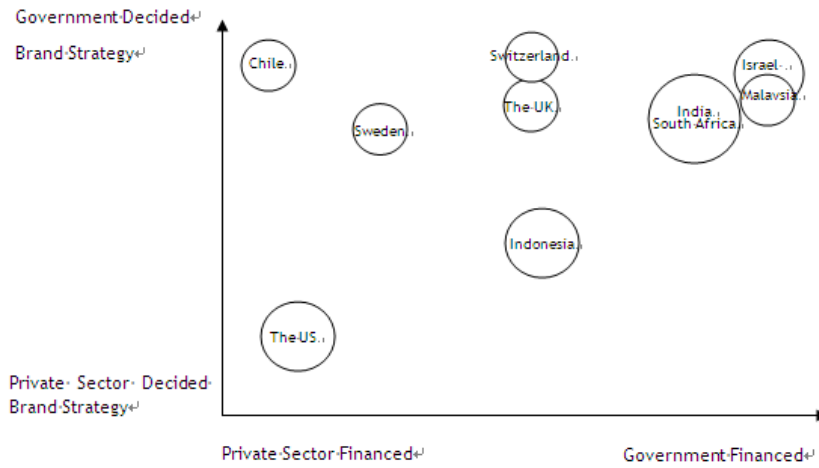


Figure 8 Different approaches for branding strategies

The arrow, in Figure 9, shows the degree to which activities are initiated by countries or their companies. A few examples can be detected that stand out from the rest: Chile, whose branding activities are 100% sponsored by the private sector which is also very involved in all promotional activities for Chile; Israel, where it is forbidden to receive funding from the private sector and the US where the government is not allowed to sponsor activities and there are separate initiatives by and for US companies rather than the country brand. In most countries there are no regulations on who are allowed to initiate branding activities, illustrated by the middle section in Figure 8. Most commonly larger events are decided by the government but for smaller activities it differs, separate companies are initiators as well.



Figure 9 Distribution of initiators for branding activities

The ideal strategy for larger branding events is for both the private sector and government representatives to collaborate. To create an aligned strategy a Project Manager or Marketing Council e.g. should be appointed.

⁵⁹ In some cases the private sector might initiate an effort but the government makes the final decision.

7 Country Branding Applied by Sweden

This chapter will illustrate how Sweden has developed its country branding strategy, its brand image, country branding efforts on the Chinese market and how others perceive Sweden. A discussion will be held regarding the Swedish participation at the Expo and how it tackles the challenges that is discussed in the previous chapter.

7.1 The Swedish Example

7.1.1 Organization

Sweden established a diplomatic relationship with China 60 years ago, as the first Western country. Since then the two countries have developed a strong relationship with both trade and Corporate Social Responsibility (CSR) agreements.

7.1.1.1 Branding Strategy

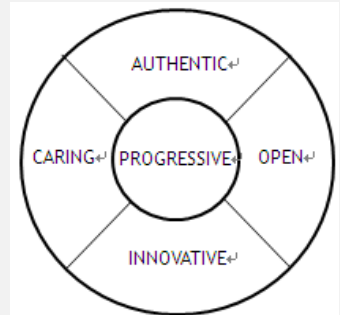
The Swedish Department for Foreign Affairs is responsible for developing the Swedish branding platform which identifies the core values of the Swedish identity. The platform serves as a foundation, displaying general attributes of the Swedish nationality, which is used for adapting a country message that meets the expectations of the destination country. The platform was developed in collaboration with the member organizations of *The Council for the Promotion of Sweden*⁶⁰. The Swedish Embassy in China interprets the message and translates it into a context suitable for a Chinese target audience; they produce themes that correspond to the core values while at the same time match what China is looking for in terms of social and economic development. Summarized, the Swedish image wants to portray itself as follows: ‘Sweden is a country focused on development based on people’s needs and environmental considerations. This in turn can be summarized by the term progressive’. The core values chosen for Sweden’s branding platform are; Authentic –reliable, honest and straightforward; Open – positive attitude to free thinking; Innovative – sees things from new perspectives; Caring – provides safety and security.⁶¹

The Swedish International Development Cooperation Agency (SIDA) provides the government with propositions for a collaboration strategy with China. The Swedish Department for Foreign Affairs is then responsible for developing a general strategy and several objectives for the collaboration between Sweden and China. Between 2009-2013 the strategic efforts will be more selective with certain focus areas; a selective development cooperation. The overall goal with the cooperation is the focus on democratic development as well as an environmental and climate-wise sustainable development.⁶²

‘Sweden currently has a theme for its branding platform that is innovation, environment and equality. In China we highlight innovation; we want Sweden to be the natural choice for China when it comes to innovation’

- Sweden

Core Values



Progressive

‘Positive change and progress/Entailing progression/Advancement’

‘A philosophy of progress and reform and the protection of civil liberties’

⁶⁰ The Council consists of representatives of the following organizations; Invest Sweden, Ministry for Foreign Affairs, Department for Export Promotion and the Internal Market, Swedish Institute, Swedish Trade Council, Visit Sweden and Ministry of Enterprise Energy and Communications

⁶¹ Swedish Institute, 2008

⁶² Department of Foreign Affairs, 2009-07-23

7.1.1.2 Collaboration of Swedish Representation in China

Swedish representation in China has a strong collaboration between the government bodies and representatives from the private sector. The Embassy works closely with both the Chamber of Commerce and the Trade Council to try and include the objectives of all stakeholders in their country branding initiatives. Although the Embassy has a yearly budget for PR, they are dependent on funding from the private sector. There are no rules that larger activities should be initiated by the Embassy or Consulate. However, larger activities, such as the Expo or Sweden Innovation Week, have been initiated by the government (then led by the consulate) and the Embassy respectively, and financed by the private sector with approximately 90% of the total budget. There are examples of activities that are initiated by the Chamber as well.

7.1.2 Swedish Regional Branding Initiatives

The Brand Sweden Platform is used to promote Swedish branding initiatives on a regional and local level. Since their resources on a local and regional level are limited, they can leverage this common platform and the research that has already been done, and elevate the country message into a message more suitable to their region/industry.

There are several regions in Sweden that want to establish a presence on the Chinese market. Öresundsregionen, is a great example of a region that has unique attributes that sets it apart from the rest of Sweden and Denmark with features such as gastronomy and local producers, fashion and design. Another specific area that is highlighted is Hammarby Sjöstad, situated in the capital of Stockholm, to show Swedish competence in environmental technology. It is often showcased to Chinese delegations on their visits to Sweden in order to show them a concrete example of sustainable building that can combine environmental solutions and an attractive environment to live in.

7.1.3 Sweden's Country Brand Identity

A strong country brand in China is a brand that is considered trustworthy, stable and reliable but also sustainable, innovative and high-tech which are attributes that seemingly correlate to the Twelfth Five-Year Plan. China is looking at countries and seeking role models in search of economic and social welfare systems, as well as environmental technology. This provides opportunities for countries to spark the interest of the Chinese government in these areas, and Sweden is trying to align its strategy accordingly. As was highlighted during the Expo, Sweden wants to be portrayed as an innovative country. To enhance this, several activities have been initiated on the subject of innovation such as; the Sweden-China Innovation Week, the 72 Hour Race to Innovation, the website Sweden.cn and the Spirit of Innovation Forum etc.

The survey about ‘

Appendix 5⁶³ asked a few simple questions about what the respondent associated with being Swedish and if they could name certain attributes and famous Swedes connected to the Swedish national identity. The responses received were overall similar to one another. There is clearly a strong sense of Sweden being a beautiful country, clean, environmentally friendly etc. The associations that respondents have of Sweden spans over the beautiful nature, cultural aspects such as herring, red cottages and Midsummer, industries being high-tech and innovative, personality traits of the Swedish people, governance, famous Swedes etc. An interesting conclusion that can be drawn is that the respondents are overall in consensus of the national identity of

⁶³ A summary of the survey result is presented in Appendix 5. Note: the responses are in Swedish.

Innovation Week

The Sweden-China Innovation Week was held in connection with the celebration of the 60th Anniversary of the Sweden-China diplomatic relationship. The Innovation Week was carried out through collaboration between the Swedish Embassy, Swedish multinationals with a focus on the Chinese market, the Swedish Chamber of Commerce and the Swedish Trade Council. The week provided opportunities for decision and policy makers on a high level from both countries to network.

Gold sponsors of the event were the Volvo Group, Stora Enso, Sandvik, Astra Zeneca, Ericsson and IKEA.

Sweden. Furthermore, when asked about prominent Swedish people that they believe are strongly connected to the Swedish identity there are a few recurring names including the King, the Prime Minister, a handful sports stars and celebrities as well as a few corporate individuals such as Ingvar Kamprad. Swedish people's perception of their COO corresponds well to what the Swedish government tries to portray as Swedish. Being a small country with a strong country brand, strong company brands and successful global export, of industries such as music, design and fashion contributes to clear attributes that makes it easier to establish what can be associated with Sweden. Even though Swedish people are not known for their national pride Swedish people have a strong sense of being Swedish. In general Swedish people travel a lot and the more exposed you are to other cultures the easier it is to establish what differences there are between your own national identity and that of others.

7.1.4 World Perception of Sweden

The global interest for the brand of Scandinavia is rising and Sweden stands out among its Scandinavian neighbors through their high ranking in the Value System and Quality of Life dimensions. Drawing a parallel to FutureBrand's Country Index, this is portrayed in the high scores received for attributes such as environmental friendliness and good educational and healthcare systems. Sweden ranks as number 10 on the global country brand index scale and is considered a country that is attractive for business with advanced technology, a regulatory environment and a skilled workforce. In general, what strong country brands have in common is the long-term consistency in advocating a national identity.⁶⁴

The World Value Survey developed a Cultural Map where they measured Secular-Rational and Traditional Values against Survival and Self Expression Values in two dimensions. The first dimension portrays the degree to which religion is important in the society while the second dimension reflects how well-developed a country is, where in the industrialization process it is. The Self Expression values emerge as the priorities shift from absolute necessities to an excess of resources.⁶⁵ The Cultural Map is found in Appendix 6. In the map Sweden is presented in the far upper-right corner, separated from the rest of the European countries with similar values. Scoring high in these two dimensions suggests a very democratic society where individuals have a high degree of freedom to express themselves, where all different religions are accepted, and one religion is neither favored by the government nor incorporated in the governance.

7.1.5 Chinese Perception of the Swedish Country Brand

Today, Sweden has a positive perception in China and can be considered to have a strong country brand. Sweden is recognized by the Chinese government for its governance, innovation and environmental technology. In general, the Chinese perception corresponds well to the global perception of Sweden, who manages to communicate a strong coherent national identity that is well received by other countries.

The project that the Swedish Trade Council initiated in 2007 called SymbioCity – Sustainability by Sweden, has been adopted by cities in China. This initiative contributes to the Swedish progressive country message that Sweden is innovative with a strong competence in environmental technology.⁶⁶

'In China, Sweden and Singapore are highlighted as successful examples of market socialism, and are referenced in the development of the future economic model of China'

–Sweden

⁶⁴ FutureBrand, 2010-11-19

⁶⁵ World Values Survey, 2010-06

⁶⁶ Swedish Institute, 2008

This acknowledgement provides great business opportunities for Swedish companies in this area but also strengthens a continuous beneficial relationship between Sweden and China since Sweden can provide technological know-how and China a huge market.⁶⁷

According to the Anholt-GFK Roper Nation Brands Index China rate the Swedish governance 3rd out of 50 countries, which emphasize the fact that China is attracted by a stable government with a strong social welfare system.

7.1.6 Utilizing the Positive Leveraging Effect

In general Sweden carries positive associations in China. It is a country that is considered attractive to live in and Swedish people are viewed as polite, reliable and viable for friendship and business relationships. The Swedish country brand is strong and so are the brands of its companies such as IKEA, Volvo (disregarding the change in ownership), and Ericsson etc.

As described earlier a strong COO brand can be utilized by its companies to benefit from a positive leveraging effect that ultimately strengthens both country and company brands. Many Swedish companies do not leverage the fact that they are Swedish.

Individual companies are doing numerous separate initiatives but they are not always done proclaiming a Swedish heritage. One strong advocate for being a Swedish company has been Volvo who has done several activities using Sweden in their marketing. They benefit from their Swedish heritage which in turn strengthens the Swedish country brand; the principle of the positive leveraging effect described earlier.

7.1.7 Potential Areas of Improvement

One challenge that Sweden face is that although it carries a general positive perception it mostly applies to people who have come across Sweden in a business or travel context. Chinese progressive influencers⁶⁸ have a basic knowledge of Sweden and a positive perception that speaks of a beautiful environment, good social welfare system and a high quality of life but no comprehensive knowledge; they cannot correctly name Swedish celebrities and brands. Across China, Sweden lack recognition and is often confused with Switzerland or clustered together with the rest of the Nordic European countries. English-speaking countries and developed countries that are larger in size are often preferred as tourist and study destinations.⁶⁹

7.1.8 Meeting Chinese Expectations

As stated previously, China has a positive perception of Sweden. Sweden does not have any apparent challenges since both the country brand and its companies' brands are strong. Still, the strength of a country brand is not permanent and it is something that has to be continuously improved. The question that Sweden has to consider is where the improvement potential lies; are they going to try and elevate the brand or simply maintain it and how will that be managed, with the most efficient use of resources, either way?

'All Swedish companies do not use Sweden in their marketing. It does not suit everyone. Still, since Sweden in general has a positive perception here in China, which can be applied by everyone, most companies benefit from this'

– Sweden

'Sweden is in our DNA and we want to be associated with Sweden in our communication'

– Volvo Group

⁶⁷ Clark, Tony, Head of CENTEQ and Ying Nilsson, Tan, SWECO, 2011-05-05

⁶⁸ Chinese citizens with higher income, ambitious, early adopters and high-tech users, critical thinkers, open-minded, ambitious, global, travel, media savvy, independent etc.

⁶⁹ Eastwei MSL, 2011-03-19

Sweden has been very successful when it comes to establishing a strong relationship with the Chinese government, especially when it comes to areas such as CSR and environmental technology where Sweden is viewed as innovative and prominent.

Furthermore, Sweden has been very successful in being connected with having strong successful companies among Chinese businessmen; although many Swedish companies do not leverage that they are Swedish. If individual companies would leverage the Swedish country brand both parties would most likely benefit from it long-term. With increased competition from other foreign companies, as well as Chinese companies, to attract e.g. Chinese students, Swedish companies need to put more resources into standing out and be able to offer something unique. In both areas, Sweden has a strong presence and should strive to maintain this position.

Regarding the Chinese public, Sweden lacks recognition to a large extent. As mentioned previously, it is often confused with Switzerland or included in the brand of Scandinavia. One of the most prominent individuals associated with Sweden is J-O Waldner who is very popular. This is somewhat outdated and perhaps Sweden should extend their branding strategy to include attributes that are more appealing to the general Chinese public and not just the Chinese government and the business industry. Sweden is a country with a trend-sensitive population and is often used as a market for testing new products. The fact that Sweden has a strong design and fashion industry should be promoted more clearly since that corresponds to what Chinese consumers (in the progressive influencer segment) are attracted by.

Many European and Western countries, such as France and the US, are popular among Chinese people because of their well-known and popular tourist attractions. In Anholt's Nation Brand Index Sweden received its lowest scores in the categories of tourism and cultural heritage. Sweden has a unique culture but few attractions that it displays clearly, such as the Ice Hotel in Lapland. Because of this Sweden lose in attractiveness among Chinese people when it comes to choosing a travel destination. It is viewed as a nice destination but when asked if they would go there on their next trip few Chinese people say yes.⁷⁰ Sweden should invest resources in trying to elevate its presence in these two areas.

7.1.9 Future Challenges

One of the bigger challenges for Sweden in general will be to elevate their brand and not just maintaining it. Since they have a strong brand to begin with it is difficult to know which efforts would generate the greatest result with the most efficient use of resources.

The use of social media is low among organizations promoting the Swedish country brand. Initiatives were formed during the Expo but only a small portion remain today (e.g. Sweden.cn). The potential with reaching out to target audiences, especially younger Chinese people, through social media channels is underutilized.

'Sweden isn't a society that has that many challenges at the moment, maybe the challenge is to find a few challenges'

– Wally Olins

⁷⁰ Eastwei MSL, 2011-03-19

7.1.10 Sweden at the Expo

The participation in the Expo was the largest promotional event abroad that Sweden has participated in so far. Overall the Expo was a success and the Swedish contribution, for which they were given several awards, was positively received by the Chinese; both by the government, business people and the general public.

The theme for the Swedish pavilion was the 'Spirit of Innovation' which showed Sweden's strengths in the areas of innovation, sustainability and creativity as well as important Swedish values of transparency and openness. The pavilion put a lot of focus on strengthening, and creating new, business opportunities and emphasized various Sino-Swedish partnerships. It was important that the pavilion was a platform for one-on-one business meetings that could be leveraged by Swedish companies. One of the messages that Sweden is trying to communicate abroad is the theme *Let's Share the Future*; that through collaboration we can build a sustainable world.⁷¹ The development is dependent on innovation that drives the technology forward and finding solutions to the challenges that we face today.⁷²

Sweden had limited resources to invest in the creation of the pavilion compared to many other larger nations. Instead of trying to compete on a technological level by displaying large plasma screens and the like, Sweden chose to distinguish itself through design and color choices. Swedish companies were incorporated into the picture that was presented of Sweden, how problems in the past have been solved with innovative solutions. Focus was on illustrating how different environmental problems had been overcome through advanced environmental technology. As mentioned previously, Sweden is recognized by the Chinese government for its expertise in environmental technology and Chinese government officials have visited Sweden several times to view progressive environmental constructions such as Hammarby Sjöstad. The Swedish pavilion has been sold to the city of Tangshan where it will be displayed inside the eco-city of Caofeidian.⁷³

7.1.10.1 Successful Storytelling

Sweden tried to, through storytelling, guide the visitor through the pavilion; in creating an experience, using different senses, telling a story about Sweden that was not too commercial. The main goal was to keep the pavilion as one unit, undivided, while at the same time giving companies the opportunity to engage themselves and creating own initiatives that aligned with the overall theme. As discussed previously it is important to create a story, described by Kotler as Narrative Branding⁷⁴, so that one can provide the visitor with an experience, thus making the pavilion more memorable. Additionally, a story creates emotional reactions that go beyond simple facts.

7.1.10.2 Tackling the Challenges

Sweden had a clear strategy for the theme with an appointed project team that had distinct responsibilities. In order to fit the 'essence of Sweden' into the pavilion a story was created that tried to give the visitor a sense of what Sweden's core values are. The private sector contributed with expertise for technical solutions used to tell the story in the pavilion. Furthermore, they got the opportunity to arrange business meetings with

'Cities today worldwide are facing social, economic and environmental challenges so complex that new approaches, processes and products are required to meet them. The future depends on our ability to innovate. By building open and tolerant societies we create scope for meeting these challenges'
- Sweden

Received Awards

The Swedish pavilion, covering an area equivalent to Södermalm in Stockholm, received several awards; BIE Award for Creative Display, Most Commercially Valuable Expo Pavilion, Excellent Pavilion Award, Best Expo website and Top 10 Pavilion Design.

⁷¹ Swedish Institute, 2010-12-07

⁷² Swedish Committee for Expo 2010 in Shanghai a, 2010-05-01

⁷³ Swedish Committee for Expo 2010 in Shanghai b, 2011-03-28

⁷⁴ Kotler, 2009-04-22

Chinese companies and government officials. It was a very conscious decision made by Sweden to have a strong business focus without being commercial.

As discussed previously Sweden has a stable relationship with the Swedish government. However, among the Chinese people, they lack well-known famous tourist attractions. To attract different target audiences the business concept of the pavilion was combined with a more playful one. With the theme 'The Spirit of Innovation' Sweden wanted to show its knowledge in sustainable innovation; a country governed by openness and cooperation and the potential of innovation. They used the known fact that in Sweden, children are allowed to be children and through this creativity and innovation is generated. With respect for the next generation, the environment for the next generation is cared for and with that comes a sustainable society. The playful theme was portrayed by a slide and swing. Apparently many Chinese had never tried neither slide nor swing before which became an unexpected success.

The main target audiences for the Expo were Chinese decision makers and young well-educated city dwellers, Young Urbans, with an outward perspective towards the surrounding world.⁷⁵ As argued above the latter can be reached to a larger extent by promoting Swedish attributes that better appeal to this generation as well as utilizing social media channels to a larger extent.

7.2 What Lies Beyond Sustainability?

2010 was the year of sustainability. Many pavilions had included at least one aspect of sustainability in their theme; ecological, green living, in harmony with nature, recycling, progress and sustainability etc.

The emerging trend goes beyond sustainability to include a lasting social responsibility. A few countries have already started to engage in these activities, e.g. the Finnish Shanku Forest Farm School Initiative. The subject of sustainability continuous to remain important but is elevated to lasting social sustainability. Efforts are increasingly done to increase the level of engagement and encourage joint collaboration.

Sweden is generally positively perceived in China and is seen as a role model when it comes to e.g. its economic system and environmental technology. However, Sweden would benefit from highlighting Swedish tourist attractions and develop a strategy that targets the Young Urban generation better.

'Sustainability should not just be a buzz word for 'greening' a business, sustainability means that we are creating futures for people'

– South Africa

'Chile will provide more relevance to aspects such as the environment and human issues: the quality of life and a context of equal opportunities'

- Chile

Finland's Shanku Forest Farm School

The Finnish private sector, Stora Enso and other Finnish companies present in China, has initiated this school project bringing forth the Finnish country brand. The financing is done jointly by the government and the private sector. The school is situated close to Stora Enso's Shankou Forest Farm and it is primarily for the children of employees at the farm. Stora Enso has provided the school with computers, printers and books as well as renovated the premises.

The school was represented at the Expo in Shanghai. The initiative is done in collaboration with other organizations and corporations including the UN development program.

⁷⁵ Swedish Committee for Expo 2010 in Shanghai b, 2011-03-28

8 Discussion

The discussion addresses the dimensions and goals that are presented in Chapter 1.3 Thesis Purpose and highlights the most important conclusions argued by the Thesis. The author would like to emphasize the fact that the discussion focus on highlighting the most important aspects brought up in the main section of the analysis in the Thesis.

8.0.1 The Concept of Country Branding

Country Branding lacks a clear definition, or conceptualization, but aims to address the abstract and emotional associations that people and stakeholders have with the country that will affect how products and business related to that country is viewed. Countries are faced with the challenge to coherently align efforts done by stakeholders in the country to successfully communicate one message. A country has to decide on a branding strategy that communicates the true identity of the country, so that it can deliver on the promise it makes. Furthermore, countries have to identify what in their core values are different and unique; what can be used as a competitive advantage. Since country branding is not measurable this is most easily achieved by benchmarking against other countries, using Indexes such as Anholt's Nation Brands Index. Figure 10 below was introduced in the beginning of the Thesis and illustrates over what bridges a country has to communicate its branding strategy.

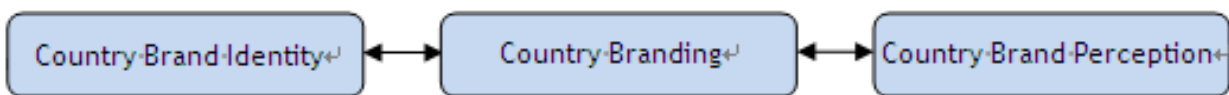


Figure 10 How a country's brand identity relates to how others perceive its identity

The increased competition enhances the importance of cooperation and collaboration among all stakeholders. The Thesis brings forth, and emphasizes, the positive leveraging effect that can be achieved if government bodies and the private sector from a country collaborate and use each others' brands in their communication. Companies with a COO that has a strong country brand benefit from leveraging their COO.

8.0.2 Country Branding in China

China is a key market and countries need to realize that the option is not whether to develop a branding strategy or not but how this can be done most efficiently and with the best possible result. China is a huge country with a rapid economic growth, already being the second largest economy in the world. The government will remain strong and still has a huge influence on the Chinese society. This, together with a trusted Chinese partner will facilitate a country's branding activities. The government experience increased competition from new channels thanks to the globalization and social media, and countries can to a greater extent influence their own brand perception in China. This tendency is further strengthened by increased importance of first- and second-hand sources of interaction.

Even though Chinese preferences might change fast and are diverse due to the sheer size of the country and the large number of its inhabitants, countries need to carefully target their audience and stay true to their core values to form a strong long-term commitment and avoid confusion amongst target audiences.

The target audiences consist of the government, companies, decision makers and progressive influencers, the general public as well as specialist organizations and NGO's. Countries have to be aware of which segment on which level to address. Government representatives have to communicate on a governmental level, company level and individual level. The message has to be locally adapted to China as well as to local Chinese regions and the country has to develop a strategic message that will be perceived in a way that corresponds to the national identity of the country. Increasingly, communication occurs in a more personalized manner, either via social media channels or on a peer-to-peer basis. The COO can use its own global citizens to spread its message further. A country that has a strong national identity deeply rooted among its citizens can leverage them to serve as country ambassadors. People living abroad often develop a strong sense of national pride and a strong emotional attachment.

Countries have to have market knowledge on a governmental, regional as well as on a local level. Most countries today target China's 1st tier cities where the competition is tougher than in 2nd and 3rd tier cities. In these cities it is easier to communicate with people at the right level and branding efforts can receive more attention.

8.0.2.1 The Shanghai World Expo 2010

Larger branding events, such as the Expo, provide several challenges for countries to overcome. Countries need to identify core values that apply to people in their own country as well as attract target audiences in the destination country. In order to meet all stakeholder requirements and align them in a coherent message one responsible management team should be appointed. Finally, most countries experience resource restraints and are dependent on their private sector for financing. A country brand should be objective and countries have to find a balance between not becoming too commercial while at the same time meeting the requirements from the private sector and provide them with business opportunities. The conclusion of an ideal collaboration strategy drawn from the research consists of governmental representatives driving branding activities that are financed by both government and private sector to different degrees. There are exceptions when smaller countries with strong brands receive strong support from the private sector and where the government side manages activities but that the activities are completely financed by only one party, with existing examples of both the government and the private sector.

8.3 Country Branding Applied by Sweden in China

Sweden has the advantage of having a strong country brand and has a positive perception in China. The long partnership between Sweden and China, going back over 60 years, has resulted in a stable government relationship with many partnerships and trade agreements. Recently Sweden has focused on activities and partnerships that involves sustainability and environmental technology and is acknowledged by the Chinese government for expertise in these areas.

However strong the Swedish country brand might be, there are challenges that Sweden faces and where there are room to elevate the country brand's strength and awareness. In China, Sweden is often confused with Switzerland or just considered a part of Scandinavia. Chinese progressive influencers have the perception of Sweden as a beautiful country with a clean environment, a good social welfare system and a high quality of life but they lack more detailed knowledge of Swedish celebrities and brands. One of the most prominent individuals connected with Sweden in China is J-O Waldner which can be argued quite outdated. A dimension that receives low scores in Country Indexes and that Chinese people fail to recognize is Swedish tourism. Unlike other popular tourist destinations, such as France and the US, Sweden lack well-known tourist attractions among the Chinese which affects the decision when the Chinese plan their next trip.

Sweden should put more resources into attracting Chinese consumers that are more prone to consume foreign brands that are well-educated and have higher incomes. Seeing as Sweden is viewed as trendy and is strong within the fashion and design industry, this could be leveraged to strengthen the awareness among Chinese citizens. It should be mentioned again that this Thesis has focused on the Eastern and Southern coastal regions of China that is more developed than the rest of the country.

It is important to constantly enhance the country message and not stagnate, in which case people will forget about it. Sweden is a country whose branding platform already stands high and strong, the challenge is to identify where the biggest improvement potential lies so that the brand can be maintained and strengthened to the most efficient use of resources.

9 Relevance and Future Suggestions

The contribution is presented in Chapter 1 *Thesis Purpose*. It aims to give the reader an introduction to the subject of country branding, the Chinese market and Sweden's branding efforts in China. Furthermore, important aspects and key factors will be discussed for a successful development of a branding strategy in China. Apart from the contribution to the subject from this Thesis the author would like to propose some future suggestions to encourage further research and provide advice for the reader what they should consider during the next few years regarding country branding in China. The section *Further Research* is directed primarily towards the academia while the section *Readers* can be applied by both academia and country representatives in accordance to how the target audience is defined in Chapter 1.3.2 *Relevance and Future Suggestions*.

Further Research

- ✧ A more extensive study could be made that includes more companies since the main focus of the Thesis have been the perspective of countries and their branding strategies. It will provide an interesting angle to further analyze the individual activities carried out by companies and to what extent they use their COO more thoroughly.
- ✧ Make a case study of a country's global branding efforts or at least in two countries so that one can compare the efforts in China and how they differ from other initiatives. It would be interesting to see how the message changes, if target audiences and focus areas etc. stay the same.
- ✧ Analyze the challenges that China faces: becoming more innovative, going global by creating successful MNC's which is necessary for China to maintain its position as the second largest economy of the world. It would be an interesting case study to look closer at these challenges that China faces and how these can be leveraged by countries and companies present in China. The Thesis has touched on the subject from the perspective of countries entering China, and not from China's perspective.
- ✧ Focus on the relationship between China and the source country. How should the source country act in order to attract FDI from China? How do countries cooperate between government bodies in the source country and the destination country (in this Thesis China)?
- ✧ Look closer at a potential strategy for Sweden to target the young urban generation. Set up a cost-value-benefit analysis to investigate the return on investment long-term.
- ✧ Promote Sweden as an attractive tourist destination by highlighting specific tourist attractions.

Readers

- ✧ Sustainability is developed to include a social purpose, especially in China local involvement and contribution to the community is very important.
- ✧ It is continuously important with Guanxi relationships and government support.
- ✧ If possible countries should leverage the opportunity of social media. It is a very efficient tool to reach the younger Chinese generation.
- ✧ The ideal collaboration strategy is a joint effort between the government and private sector. It is the most efficient use of resources and benefit both parties.

The branding strategy has to be consistent, creating a coherent message stretching across all involved parties such as the government, private sector, decision makers etc. Do not confuse the target audience by switching between market segments and changing brand values.

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Appendix

Appendix 1

Interview guide for qualitative interviews

Approved.

Intro

The following questions are meant as a semi structured guide for the upcoming interviews - all questions should be answered during the interview, but does not have to be formulated in the way presented here.

For the first set of questions it is assumed that there exists a coordinated branding strategy, while the latter are to be asked to countries and companies that do not know of a coordinated nation branding strategy existing for their country of origin.

Questions to official representatives of the country (ex Ambassadors, Tourism Boards, Trade Boards)

1. **Country of origin, Position, Organization**
2. **How long has your country had diplomatic relations with China?**
3. **How long have you been in China?**
4. **Does your country have brand platform/key messages for your country brand?**
5. **What are the core concepts of your country's brand? Key points to discuss when examining the core concepts of the brand**
 - a. **Is the brand leveraging, or using, stereo types of your country (e.g. samba/football Brazil or wine/food for France) or is the country brand an attempt to re-brand the country and isolate it from stereotypes? Why was this choice made? Is it successful? What are your thoughts around it?**
 - b. **Is the brand trying to give the full picture of your country, or focusing on one specific part of the country? Is it the same brand used for tourism as for trade? Does it use rational or emotional elements, or both? (i.e if targeting investments, is "hard facts" such as tax complemented with "soft facts" such as clean nature, high quality of life etc?)**
 - c. **Do you believe that you have found a unique way of branding your country - does it stand out? Why/why not?**
6. **Is your country brand "universal", or is it specific in China, i.e targeted and localized to fit China? What are the rationales behind this?**
7. **When was this brand platform/key messages formulated? By whom? Please explain the process that led to this brand platform. Be sure to articulate the perceived situation that led up to this, who imitated the project, who drove it, who participated and the different roles they played in the process, and who financed it.**
8. **Have there been any country branding activities conducted in China during the last five years. Please give relevant examples of:**
 - a. **Relevant country branding activities during the last five years. (Type of event, outcome, when in time, involved parties and their roles, approximate investment from involved parties, organizational model: financing/management/initiation, where in China)**

- b. Summarize the organizational model you're your country's country branding efforts in China, according to the above management/operations/initiation/financing Has there been any difference in the method of operations regarding this during the last five years, or is it always the same? What are the benefits/drawbacks with this way of operating?
 - c. Future plans for country branding activities (actual and wish list). Rationales for the choices. (Type of event, desired outcome, when in time, involved parties and their roles, approximate investment from involved parties, organizational model: financing/management/initiation, where in China).
9. ***If the Expo wasn't highlighted separately above, make sure to clarify: Do you think your country brand benefitted from the Expo?***
- a. Organizational model
 - b. Major mistakes/key success factors?
 - c. What were the main gains?
 - d. Do you think that the future plans are enough to leverage the momentum from the Expo?
10. **Over all, are you happy with the way your country's brand is perceived in China?**
11. **What are the drivers/objectives behind doing country branding in China? Who will benefit the most?**
12. **Do you believe that country branding for your country will be more important in the upcoming five years, or not?**
- a. In China (please provide rationales)
 - b. In the world (please provide rationales)
13. **Will you spend more or less money on country branding in the upcoming five years?**
- a. In China (please provide percentage related to figures today and five years ago)
 - b. In the world (please provide percentage related to figures today and five years ago)
14. **Who are the most important target audiences that your country would like to communicate with/create an image for? Please state, and then rank in order of importance.**
15. **Are there any differences between branding your country in China compared to other parts of the world?**
- a. From level of importance and why
 - b. Form level of complexity and why
 - c. From drivers for country banding
 - d. From what target audiences that are relevant
 - e. Others you can think of
 - f. In those cases that challenges were stated: how could they be overcome?

If this is not clarified in the answers above - continue with:

16. **Please describe the organizational model used for country branding efforts in China.**
- a. Who are the involved parties, what are their respective responsibilities, who is initiating the efforts, who is managing and who is financing?
 - b. Who would be the most influential parties in communicating your country's brand, according to you?
 - c. Are you happy with this model, or would you like to see a different organizational model - if so: please describe.
17. **What cities in China do you believe are the most important to focus on when doing country branding? (1st tier or 2nd tier) Has this changed over the last years, or do you think it will change in the upcoming five years? Please provide rationales and proof points if possible.**
18. **What country branding activities that you have conducted in China have been the most successful? What were the key success factors?**
19. **What does the country branding strategy for China look like for the upcoming five years?**

Others

20. What other countries do you believe have been successful in their nation branding in China?
21. What have they done right?
22. What are the key success factors to improving a country's brand on foreign market? In general and in China.
23. What are the perceived risks, or downsides, with doing country branding - in general and in China?
24. Any future trends in country branding you can pinpoint? What is beyond "sustainability"?
25. From our perspective, we can see that some companies chose to leverage their country's brand in their efforts - and some countries in turn chose to leverage their company brands to position the country. How would you say your country is balancing this, and why?

Questions to company representatives.

General Introduction

Please clarify to respondent that he/she is not expected to deliver clear answers to the questions about the brand/message background and key elements. We still would like to ask, in case he/she would have this information. The key information we are looking for are from a company perspective, and the experiences they have had regarding country branding.

General info:

1. Company, position
2. Number of employees
3. How long has your company been present in China?
4. Type of company (business to business, consumer etc)
5. How long have you been in China?
6. What are the core concepts of your country's brand? Key points to discuss when examining the core concepts of the brand
 - a. Is the brand leveraging, or using, stereo types of your country (e.g. samba/football Brazil or wine/food for France) or is the country brand an attempt to re-brand the country and isolate it from stereotypes? Why was this choice made? Is it successful? What are your thoughts around it?
 - b. Is the brand trying to give the full picture of your country, or focusing on one specific part of the country? Is the same brand used for tourism as for trade? Does it use rational or emotional elements, or both? (i.e if targeting investments, is "hard facts" such as tax complemented with "soft facts" such as clean nature, high quality of life etc?)
 - c. Do you believe that your country of origin has found a unique way of branding your country - does it stand out? Why/why not?
7. Is your country brand "universal", or is it specific in China, i.e targeted and localized to fit China? What are the rationales behind this?
8. When was this brand platform/key messages formulated? By whom? Please explain the process that led to this brand platform. Be sure to articulate the perceived situation that led up to this, who initiated the project, who managed it, who participated, and who financed it.
9. Have you participated in any country branding activities conducted in China during the last five years? Please give relevant examples of
 - a. Relevant country branding activities your company participated in during the last five years. (Type of event, outcome, when in time, involved parties and their roles, approximate investment from involved parties, organizational model: financing/management/initiation, where in China)

- b. Summarize the organizational model your country of origin use for their country branding efforts in China. According to the above management/operations/initiation/financing; has there been any difference in the method of operations regarding this during the last five years, or is it always the same? What are the benefits/drawbacks with this way of operating?
- c. Future plans for your company's country branding activities (actual and wish list). Rationales for the choices. (Type of event, desired outcome, when in time, involved parties and their roles, approximate investment from involved parties, organizational model: financing/management/initiation, where in China).
- d. Has there been, from your knowledge, any country branding activities in China where your company chose not to participate? Why not?

10. If the Expo wasn't highlighted separately above, make sure to clarify: Do you think your country brand benefitted from the Expo? Do you think that your company brand benefitted from the expo?

- a. Organizational model
- b. Major mistakes/key success factors?
- c. What were the main gains for the country brand?
- d. (if a sponsor) What were the main gains for your company? Have you seen anything substantial come out from the Expo sponsorship?
- e. (if a sponsor) Knowing what you know today, and given the opportunity to sponsor the pavilion again, what would you do, and what would you do differently?
- f. Do you think that your country's future plans for branding activities in China are enough to leverage the momentum from the Expo?

11. Over all, are you happy with the way your country's brand is perceived in China?

12. Do your company benefit from your country of origin having a strong brand in China? Please provide clear rational and examples. Specify and rank what target groups where there is the biggest benefit. If no benefit: please provide rationale.

13. What is the role of a strong country brand when attracting human resources?

14. How can your company make sure to benefit from the country branding initiatives your country of origin is undertaking?

15. Could you provide some examples where you have benefitted from strong country branding/had disadvantages due to weak country branding?

16. Would you like there to be more country branding efforts in China for your company's country of origin's brand?

- a. What kind of initiatives?
- b. Who should initiate/finance/manage?

17. Do you believe that country branding for your country in China will be more important in the upcoming five years, or not? Please provide rationale.

18. Will your company spend more or less money on country branding in the upcoming five years? Please provide rationale to this, if possible percentage related to figures today and five years ago.

19. Who are the most important target audience that your company wants to communicate with/create a perception with in regards to country branding messages? Please state, and then rank in order of importance.

If this is not clarified in the answers above - continue with:

20. Please describe the organizational model for your country or origin's branding efforts in China.

- a. Who are the involved parties, what are their respective responsibilities, who is initiating the efforts, who is managing and who is financing?
- b. Who would be the most influential parties in communicating your country's brand, according to you?
- c. Are you happy with this model, or would you like to see a different organizational model - if so: please describe.

21. What cities in China do you believe are the most important to focus on when doing country branding? (1st tier or 2nd tier) Has this changed over the last years, or do you think it will change in the upcoming five years? Please provide rationales and proof points if possible.

22. What country branding activities that you have conducted in China have been the most successful? What were the key success factors?
23. How does your company view country branding efforts in China for the upcoming five years? (provide rationale, and compare to today and five years ago)

Others

24. What other countries do you believe have been successful in their nation branding in China?
25. What have they done right?
26. What companies have been successful in leveraging country brands? What would be key success factors?
27. What are the perceived risks, or downsides, with doing country branding - in general and in China?
28. Any future trends in country branding you can pinpoint? What is beyond “sustainability”?

From our perspective, we can see that some companies chose to leverage their country’s brand in their efforts - and some countries in turn choose to leverage their company brands to position the country. How would you say your country is balancing this, and why?

Appendix 2

The 6 dimensions included in the Anholt-GFK Roper Nation Brands Index are explained more in detail below.⁷⁶

Governance

A country's image is affected based on the government's take on democracy and social welfare, legal and environmental issues. The governance is based on the view of a country's government and its competence and level of justice, environment, human rights and other global issues.

Tourism

Traditionally tourism has been the natural channel for branding a country. Tourism is measured by the degree to which people want to visit a country and the attractiveness that monuments, landmarks and natural scenery hold as tourist attractions..

Culture and Heritage

Cultural activities that goes cross-border either through travelling concerts, celebrities, or arts and literature that are spread internationally etc. This dimension measures the perception of a nation's culture as well as the popularity of different aspects of it worldwide.

Investment and Immigration

Immigration measures to which extent people want to study, work or live in the country while the investment reflect .people's perceptions of the country's economic and social situation.

People

The citizens of a country are measured on their values, belief systems and mentality. Are they well-educated, friendly, reserved, hostile?

Exports

The products produced and exported by a country can serve as great brand influencers if the COO is known to the receiver. The dimension measures to what extent products and an export from this country is sought out or avoided.

⁷⁶ http://www.gfkamerica.com/practice_areas/roper_pam/nbi_index/index.en.html,
<http://www.simonanholt.com/Research/research-introduction.aspx>

Appendix 3

Future brand is a global brand and innovation consultancy that works with nation branding, city, regional and product branding. Since 6 years they have, together with BBC World News, published a Country Brand Index that examines and ranks country brands based on scores calculated with the FutureBrand Hierarchical Decision Model. The information is gathered from 3400 international business and leisure travelers from across the world. Countries are measured on 6 categories: awareness, familiarity, associations, preference, consideration, decision/visitation and advocacy. **Awareness:** Do key audiences know that the country exists? How top of mind is it?

Familiarity: How well do people know the country and what it offers?

Associations: What qualities come to mind when people think of the country? We look at the measured perceptions of five key association dimensions: tourism, heritage and culture, good for business, quality of life, value system.

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

Consideration: Is this one of the countries being thought about for a visit?

Decision/Visitation: To what extent do people follow through and visit the country?

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

Appendix 4

China GDP per capita 2009 by province: all below USD3,000 per capita, except for Shanghai



Source: HSRC, CXC, IMF, CIA

Figure 11: 2009 GDP per capita by province: China ranks 99 in the world, still behind Albania at 96, despite 30 years of rapid growth



Source: HSRC, CXC, IMF, CIA

Appendix 5

Vilka 3 ord skulle du beskriva Sverige med? (vad är det första du tänker på/vilka associationer får du när du hör ordet Sverige)

kallt, mörkt och ljust
underbar natur frihet skräpiga städer
Lagom
Inovativt Högteknologiskt Jämnställt
trygghet, natur, köttbullar
Orörd natur fyra årstider "gott om plats"
grönt, säkert, vackert
Arbete, rättigheter, tollerans
Skog, snö, röda små stugor
Rent, natur, frihet
demokrati höga skatter vacker natur
Lilla Landet lagom
Midsommar, Musik, Årstider
Demokrati Möjligheter Ansvarstagande
Kalles kaviar, knäckebröd och ljusgröna björkar
fantastiskt, lagom, natur
Førsiktighet Jantelag Storføretagande
Tryggt, rent, tyst
Vänligt, förlåtande, bra
Fungerande, valfrihet, välfärd.
Trygghet, Frihet, Naturrikedom
natur, vattenkraft, utbildning
Kallt, turism, skärgård
Rent vatten .. badar i dricksvatten tydliga årstider omtyckt av andra läner
Natur (skog), dalahäst, hav
demokrati, öppna landskap, glesbygd
samarbete,byråkrati,självgodhet
Kallt, vackert, solidariskt
Natur Tystnad (stort land) Skog Sill
avlångt glest vackert
ordning och reda
Socialism, snö, Stockholm
Raggmunk, Dalahäst, Skärgård
Svenska fjällen, midsommar och sill
frisk luft, vatten och vackert
grönt, sommar, stabilitet
Köttbullar, sommar, sjöar
Lagom, tryggt och kallt
Midsommar Hemma Natur
Snö, mörkt, grönt
Grönt, öppet landskap, skärgården
stabilt, socialt fegt, tryggt
Osthyvel, skärgård och prinsessårta

Skärgård Vatten Kyla
natur, miljö, välordnat
Neutral, lugn, välfärd
Isolering, Natur, Vackert
självständigt vackert miljömedvetet
vacker natur, ren luft, ett jämlikt samhälle
årstider, demokrati, rikedom
Midsommar, skärgård och "borta bra men hemma bäst"
Tryggt, fridfullt, skärgård
Jantelag, svensk sommar och välfärd
Tryggt, stort, varierande
Natur, skönhet, välkomnande
Hög teknologisk utveckling, Socialistisk, Volvo
Rent, städat, organiserat
Rikt, litet, kallt
Natur Ankdamm Idyll
Allemansrätt, välfärd, utomeuropeisk invandring
Fint, lugnt, snällt
trygghet, årstider, kallt
ordning, naturidyll, kyla
Öppna landskap Naturlighet Demokrati
Lösödis, skärgården, IKEA
Stabil, försiktig, korrekt
Rent, Vackert och höga skatter
vackert, milövänligt, konsensus
Natur, rent, konsensus
Nobelpris Faluröd Stockholm
Stabil,
tryggt, fin natur, få människor
Liberalt, kulturrelativistiskt, vackert
Storslagen natur, Midsommar, stort sportintresse

Kan du nämna ett personlighetsdrag som du tycker är svenskt?

individualistiska, arroganta, tafatta

jantelagen

Blyg

Rättfärdighetsmedvetenhet

att vara reserverad

Lojalitet

prestigelöshet

Jante

Tillbakadragen

lugn

ordningssam

integritet

Viss jante eller flock-mentalitet

sarkastisk humor

godtrogenheten

Rättvis

Førsiktighet

Ärlighet

Blyghet, ödmjukhet

Kreativitet.

Consensus

att det ska råda konsensus

värna om naturen

själv tillräcklighet

ärlighet

myndighetsrespekt

Att vara lugn

Omtanke

avundsjuka

dåliga på att inse att vi har ett ansvar alltid någon annans fel.

Uttrycker inte känslor så högljutt

Ärlighet

Tillbakadragen

fega

nej

Butterhet

Att vara reserverad till en början men väldigt varm och öppen när man väl kommit innanför skalet

Reserverad

Lagom

hjälpssamhet

ödmjukhet

återhållsam

Självömkande

fördragsamhet med överheten

Tystnad. Det finns en social stigma att alltid upprätthålla anständighet offentligt, vilket får utomstående att tro att svenskar är något icke-sociala.

reserverad

tävlingsanda/prestige/avundsjuka i fråga om status

Ärlighet, samarbete, ansvarstagande

fåordighet, lyssnande, lagom

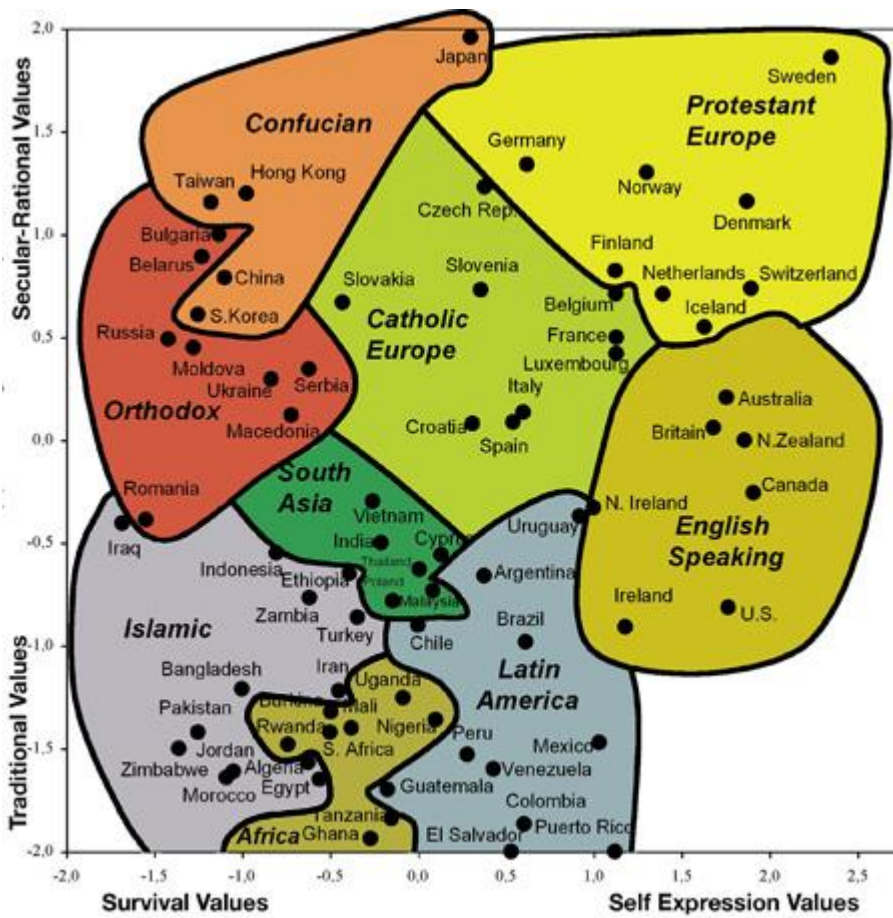
Inte våga sticka ut

Vem är, enligt dig, en framstående svensk person som du tycker bidrar till att sprida Sverige som land utomlands? (nämna max 3)

Björn Borg, Stenmark
Alfred Nobel Björn Borg
Ingvar Kamprad :)
Hans Blix Ingvar Kamprad Margot Wallström
Kronprinsessan Viktoria Ingvar Kamprad Zlatan Ibrahimovic
Jan Eliasson Björn Borg Hans Blix
alfred nobel, j-o waldner, björn borg
Dag Hammarskiöld, Stig Larsson, Abba
Ingvar Kamprad, Kung Carl Gustaf
Alfred Nobel, Björn Borg
Alfred Nobel
Alfred Nobel, Zlatan, Raoul Wallenberg
Ingemar Bergman Ingvar Kamprad Robin
Zlatan
Olof Palme, Abba och kronprinsessan Victoria
Astrid Lindgren,
Fredrik Reinfeldt
Ingen, just nu
Konungen
Ingvar Kamprad & Stefan Persson.
Kronprinsessan Viktoria
Alfred Nobel Astrid Lindgren drottning Silvia
Kungen, Drottningen, Victoria
Kungen Kronprinsessan Roul Wallenberg
Victoria, Dawit Isaak och Carl Bildt
Invar Kamprad, Hans Blix Statsministern
Alfred Nobel, Björn Borg,
Jon Olsson Raol Wallenberg
PG Gyllenhammar
ABBA
ingvar kamprad björn borg abba
Robyn
Victoria Zlatan Carl Bildt
Ingvar Kamprad
Ingvar kamprad IKEA, Stefan Persson H&M, Kronprinsessan Viktoria
Victoria Bernadotte, Alexander Skarsgård
Carl Bildt
Ingvar Kamprad
Ingvar Kamprad Alfred Nobel
anja persson, björn ferry, christian olsson
kamprad, daniel ek (spotify), anders borg
Prinsessan Victoria, Hans Blix, Ingvar Kamprad
Niklas Zennström
Cecilia Malmström Margot Wallström Anders Borg
Anders Borg. Han är den som återupplivade den Svenska återhållsamheten och neutrala, tysta effektivitet utomlands. Hästsvansen hjälper till att visa ett "judgement-free" samhälle
Ingvar Kamprad, Carl Bildt, Robyn
Ikea/Ingvar Kamprad
Kamprad, Alfred Nobell
Nobel, Stieg Larsson, astrid lindgren
Kronprinsessan Victoria
Robyn, Zlatan, kronprinsessan

Ingvar Kamprad,
Carl Henric Svanberg
Astrid Lindgren, Kungen, Zlatan
Ingvar Kamprad, tänk på att min åsikt har färgats av uppdrag granskning, annars hade jag svarat Fredrik Reinfeldt
Ingvar Kamprad
Ingvar Kamprad
Astrid Lindgren
Alfred Nobel, Astrid Lindgren, Kamprad
Zlatan, IKEA (jag vet, ingen person, men det man mest forknippar med Sverige utomlands)
Ingvar kamprad Zlantan
ingvar kamprad
Kamprad Margot Wallström
Ingvar Kamprad (även fast IKEA inte är svenskt så har folk den känslan)
Zlatan - ABBA - Ingvar Kamprad
Ingvar Kamprad och Kungafamiljen
Alfred Nobel, Calr Bildt, Jan Eliasson
Carl xvi Gustav
Kungen Carl Bildt J.O. Waldner
Alexander Skarsgård
Astrid lindgren, bjorn borg,
Carl XVI Gustaf, Ingvar Kamprad, Robin Söderling
Ingemar Stenmark, Kungen & drottningen, kronprinsessan Victoria

Appendix 6



Source: http://www.worldvaluessurvey.org/wvs/articles/folder_published/article_base_54