

**COUNTRY IMAGE MANAGEMENT: BRAND SPAIN IN THE UNITED STATES
(U.S.)**

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Abstract: This case study examines the Spain Brand, whose main objectives include updating and defining the image of Spain abroad and improving tourism, trade, and FDI. This paper selects the United States and measures the evolution of sectors where the strategy has aimed to improve since its implementation in 2002. Government sources show that the bilateral relationship between the U.S. and Spain has increased in the past decade. This approach proposes an objective way of evaluating the effects of a place brand strategy, and can be used for place branders and governments to track the effectiveness of their country brand campaigns.

Keywords: Branding; Country image; Bilateral Relationship.

JEL Codes: F10, M30.

1. Introduction

Country branding, also known by a less conflictive term of “country image management”, has consolidated itself as a necessary tool of governments in order to compete in the global marketplace. However, the ability to assess the influence of a place branding strategy has recently come under a rather dismal discussion (Anholt, 2008; Fan, 2010). Simon Anholt, a pioneer of nation branding, has questioned the correlation between changes in national brand value and expenditure on ‘nation branding campaigns’ (Anholt, 2008). Country Image Management Indexes, like the Anholt-GfK Roper Nation Brand Index or the FutureBrand Country Brand Index, track the external perceptions of various countries; however lack an actual measurement of how a country's perception, either positive or negative, affects its economy. This study focuses on a country –Spain– and employs real data figures from a variety of sectors in order to evaluate the areas in which a country image management strategy seeks to affect.

Since 2002, Spain has made a conscious effort to streamline its efforts to create a country brand that will bring its image up to date, increase tourism, Foreign Direct Investment (FDI), and attract students and workers.

In this paper, we aim to analyze the efforts made by the "Spain Brand Project", a collaboration of the public and private sector and which includes ICEX (the Institute for International Trade), the Royal Elcano Institute (a Spanish think-tank), the Forum of the

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Leading Brands of Spain (Foro de Marcas Renombradas Españolas –FMRE–), and *Dircom*, (the Association of Communication Directors). By reviewing the objectives of the Spain Brand Project we can understand which sectors the project hoped to improve and how they planned to achieve these goals. In identifying an audience, in this case the United States, we can observe country-specific efforts by part of the Spain Brand Project and evaluate their results in the target public. This study aims to create a holistic, bilateral, economic analysis methodology that will serve to measure the success of a country brand project.

2. The Spain Brand Project

The Spain Brand Project began with a compilation of all existing information regarding the exterior image of Spain (Noya, 2002). In summary, the study found that Spain had a positive image, especially in comparison to other Latin countries, and an excellent cultural and artistic image, but that perceptions of Spain are overall stereotyped, simplified, and not true to the current reality of the country. At the time, international consumers had limited knowledge of Spanish products and brands. The study found that in many countries, and especially in the United States, the Spain brand simply lacked an image. In many places, including the U.S., Spain's image was divided into two archetypes: the romantic image and the image of the *conquistador*. The romantic image portrays Spain as the exotic, simple, authentic country portrayed in works by Washington Irving, Ernest Hemingway, and Gerald Brenner. In Latin America, the internationalization of Spanish companies recreated the historic image of Spain as the belligerent, colonial *conquistador*. The conclusions of Noya's 2002 study provided a starting point for the efforts of the Brand Spain Project's to redefine and reposition the Spain brand.

In 2003, the Spain Brand Project held a series of conferences and round table discussions attended by sociologists, historians, entrepreneurs, representatives of Spain's autonomous regions, marketing and communication experts, and international media representatives, all of whom contributed ideas towards forming a work platform for the future of the Spain Brand. Based on the conclusions of the conference, in December 2003, the "Informe Proyecto Marca España" (IPME), or the Spain Brand Project Report, was published and included a summary of findings and recommendations based on this conference (ICEX *et al.*, 2003). An important aspect of the Project Brand Spain Report calls for the creation of a Committee dedicated to the Spain Brand that, in the least, is a working group or task force in charge of promoting the idea and development of the Spain Brand. Based on recommendations, the members of this Committee, in addition to being represented in DIRCOM, FMRE, ICEX and Royal Elcano Institute, should also be present in the public and private institutions which are the most active in the development of Spain's external image. This Committee would be responsible for a Permanent Observatory of the External Image of Spain, which would have the goal of conducting research on the perception of Spain abroad, public and private efforts to better the image of Spain, and Spain's international image in comparison to other countries. The Committee would be in charge of elaborating and carrying out the directives of the Spain Brand, which would be based on the strategic plan of the new image of Spain abroad and which, based on the conference, included segmenting and targeting the international market (based on the notion that country images are different in geographical/geopolitical

markets) as well as an internal marketing plan. The internal market, along with Spaniards, consists of immigrants and foreign students, who eventually act as informal ambassadors of Brand Spain by sharing their experiences, ideas and perceptions of Spain with their home countries. This Committee was also given the responsibility of organizing meetings, seminars, and conferences about external images, public diplomacy and the nation brand (ICEX *et al.*, 2003). Parts of the tasks assigned to this committee were implemented, but a competent organization, the High Commission of the Spain Brand, was created in July 2012 (Boletín Oficial del Estado –BOE–, 2012)

Another feature of the Project aimed to improve public relations, by means of increasing the visibility of Spain on an international level: supporting the candidature of Spaniards in international organizations, financing bilateral programs and exchanges for young leaders and businessmen, etc. Involvement and achievements in international sporting events contribute as well to the creation of a country image (Brown *et al.*, 2001). The Instituto Cervantes, a non-profit, public Spanish organization, is another fundamental part of the project, which is delegated with the task of supporting Spanish language learning and sharing Spanish culture abroad. Turespaña, the Spanish tourist board, also contributes to creating a country brand by disseminating actual images of the country that consumers can be exposed to in their home country. Finally, the initiative of Honorary Ambassadors of the Spain Brand is a plan to promote individuals and groups that have made contributions to creating an attractive image of Spain. Since its inception in 2005, various artists, scientists, businessmen, politicians and sports teams have been honored as Ambassadors of the Spain Brand.

3. Forging Bilateral Relations Spain – U. S.

In 2004, "ICEX spent 16% of its global marketing budget in the United States" (Chislett, 2005: 79), in an attempt to break into the U.S. market. Chislett's study mentions that especially outside of New England, California, Florida and Chicago, Spain has a generally unidentified country image, which causes products that are exported to the rest of the country to be confused with products from Latin America. Spain, unlike the rest of Europe, remains defined by stereotyped images, such as bulls and flamenco, which does little to help improve exports and FDI, even though it may help to promote a unique cultural tourism experience.

In reaction to the negative or undefined image associated with Spanish products highlighted in the 2002, 2003 and 2008 studies, the *Made in/by Spain* plan to improve the image of Spain in the U.S. that was put into effect in 2009 and relaunched in 2011. It is managed and developed by the Ministry of Economy and Competitiveness, and executed by ICEX. Its objective is to improve the perception of the Spanish economy, technology and products, and its first target market was the United States. During the first stage of the *Made in/by Spain* plan (2009-2011), Spanish companies in the United States were awarded 90 bids for projects amounting to 10 billion Euros and 66 Spanish companies opened in the U.S., accounting for the largest market outside of the EU where Spanish companies were opened (Ministerio de Industria, Turismo y Comercio, 2011). Spain is the United State's primary trading partner for renewable energies. The Spain Business Forum (SBF), an initiative to increase dialogue between Spanish and American businesses, was put into action during this 2009-2011 period. ICEX is also responsible for a set of image campaigns within the U.S. to promote certain sectors. Among them we

can include: Food & Wines from Spain, Interiors from Spain, Fashion from Spain, Audiovisual from Spain, Study in Spain, America Reads Spanish, Tile of Spain, and España: Technology for Life. Due to the success of the *Made in/by Spain* Plan in the U.S., a similar plan was introduced in Russia in 2011/2012.

In addition to the public relations efforts mentioned above, in the United States many cultural factors were essential to Spain's image-building endeavor. A distinguishing point of nation branding, indeed, product branding, is that a country (or company) is not the sole owner of the nation's image, and therefore is not in control every aspect of it. This makes nation brand management more difficult, but, if the image is properly managed, also contributes to a more organic, democratic, and perhaps more authentic image of the country. Nation brands can be positively or negatively reinforced by the media and celebrities, international sports competitions and current events. As Anholt puts it, "countries that are active in international politics, commerce, culture, society or a combination of all four, generally find that their image tracks their reality more closely than those that are less active" (Anholt, 2008: 211-212). So, even with actions that are unconnected to the Brand Spain Project, Spain's image can benefit, simply by participating in the international dialogue.

One aspect of these "uncontrolled" contributions to Spain's image in the U.S. has been TV programs which bring Spain and its culture into the living rooms of America. "Spain...on the Road Again" with actress Gwyneth Paltrow and celebrity chef Mario Batali aired thirteen episodes on PBS from September to December 2008. Due to the participation of popular American celebrities, the show gained publicity through interviews with Oprah, spreads in People and Glamour magazine, as well as various articles in the New York Times and other national and local newspapers. Another 2008 culinary show, "Made In Spain" with José Andrés, is shown on PBS and emitted by RTVE. This culinary exploration of Spain by regions is sponsored by ICEX, Foods and Wines from Spain, Turespaña, as well as regional government institutions. Like "Spain...On the Road Again", this show promotes Spanish food and beverages, Spanish tourism (by profiling a region every episode) and introduces Spanish culture to the audience. These programs, though not direct initiatives of the Spain Brand Project, have invited Americans to learn about Spanish culture and geography in an entertaining way that provides an image of Spain and demonstrates the multiple facets of modern Spanish life.

The cinema is another way that Americans can experience and understand Spanish culture. In 2008, Americans were enchanted by Spain in *Vicky Cristina Barcelona*, which won actress Penelope Cruz an Oscar in 2009 and presented an updated Romantic image of Spain: sensual, whimsical, artistic, modern (Vicky Cristina Barcelona, 2008). *Biutiful*, nominated for two Oscars in 2011, showed a completely different Barcelona than portrayed in Woody Allen's movie (Biutiful, 2010). This dichotomy presents two faces of Barcelona, and though both are authentic depictions of the city, the audience is more likely connect to the one that reaffirms their perceptions of the country. Pedro Almodóvar films present Spain's dynamic, post-Franco democratic state, and display a Spain that is "exciting and fashionable" (Epps and Kakoudaki, 2009: 10).

Participation in international sporting events and the popularity of sports figures represent another vehicle for a nation to participate in the international dialogue. The 1992 Barcelona Olympics were an opportunity for Spain to affirm its position as a

modern country in the eyes of the international community and to change any lingering stereotypes associated with the backwards dictatorship of Franco. Since 2008, Spain has taken center stage as an international sporting power. The national football team has won two European Soccer Cups (2008, 2012) and the World Cup (2010). Growing interest in soccer in the U. S. has brought Spanish soccer players and their victories to the forefront of Americans minds. The National Basketball Association (NBA) has seen Spanish players like Pau and Marc Gasol, Ricky Rubio, Rudy Fernandez, Jorje Garbajosa, Juan Carlos Navarro, Serge Ibaka, Raúl Lopez, and Fernando Martín. The success of these players in the NBA, especially Pau Gasol, creates a recognizable and popular representative of Spain within the U. S. The same goes for tennis players Rafa Nadal and David Ferrer and golfers like Seve Ballesteros and Sergio García. Miguel Indurain's four consecutive Tour de France victories (1991-1994) and the Tour de France wins of Óscar Pereiro (2006), Alberto Contador (2007, 2009) and Carlos Sastre (2008) influenced international recognition of Spanish cyclists. The Olympics represent a worldwide stage to promote national sporting accomplishments, and the recent London summer Olympics may have, for a short time, helped to bolster the interest in Spanish athletes; especially in competitions like men's basketball and women's waterpolo, where the United States and Spain competed in the finals for the gold and silver medals.

Aside from the celebrity gained from TV shows, cinema and sporting events, institutions of higher education with international recognition crease a serious and respectable modern image for Spain, and can be used to influence attraction of FDI. Spanish business schools frequently appear on international top ten rankings.

Table 1. Financial Times Global MBA Ranking 2013

Rank	Institution	Country
1	Harvard Business School	USA
2	Stanford Graduate School of Business	USA
3	University of Pennsylvania: Wharton	USA
4	London Business School	UK
5	Columbia Business School	USA
6	Insead	France/Singapore
7	Iese	Spain
8	Hong Kong UST Business School	China
9	MIT: Sloan	USA
10	University of Chicago: Booth	USA
11	IE Business School	Spain
22	Esade Business School	Spain

Source: Authors' elaboration; adapted from Financial Times, 2013

By gaining a spot on these prestigious rankings, Spain is participates on the world stage, which promotes Spain as a country with a positive business environment as well as endorses Spanish business school graduates around the world.

The actions and success of actors, film and TV directors, athletes and business schools are means of introducing, familiarizing and redefining a country brand in the eyes

of the international audience. By creating an image based on the true reality of a nation's culture, cuisine, language, landscapes and personality, foreign countries can create an idea of the country based on its current reality, and not based on historical stereotypes. This image creation is fundamental in inviting customers to create a relationship with the country, through exports, travel, or investment.

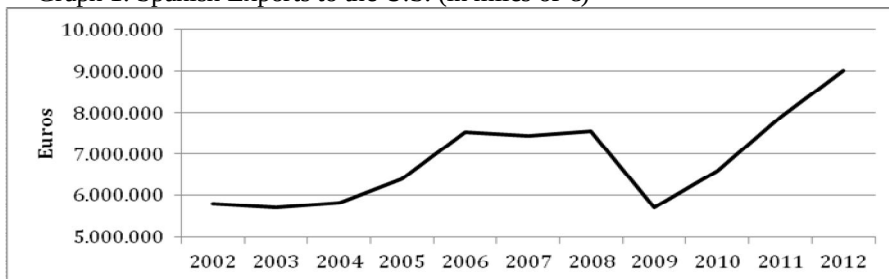
4. Data Analysis

In order to analyze the effects of the Spain Brand Project, we identified five key areas in which the Spain Brand Project hoped to improve: trade, tourism, attraction of students and workers, and FDI. We gathered data on Spanish exports to the U.S., the number of American tourists in Spain, number of American exchange students and Americans with residency in Spain, and U.S. Direct Investment in Spain. By evaluating the 10-year trend from the start of the Brand Spain Project in 2002-2003, we can understand how the relationship between Spain and the United States has evolved over the duration of the plan.

Trade

The U.S. is consistently ranked Spain's 6th receptor of exports, after France (16.2% of total exports in 2012), Germany (10.5%), Italy (7.4%), Portugal (6.9%), and the UK (6.2%), whereas the U.S. accounted for 4.0% of total exports in 2012. (ICEX, 2013). As we can see in Graph 1, the value of Spanish exports to the United States had a generally positive trend from 2002-2008, but in 2009 fell to 2002-2003 figures. The worldwide financial crisis caused a reduction in exports in many countries, and in the United States imports of goods and services shrank overall, from \$2.14 million in 2008 to \$1.58 million in 2009 and \$1.93 million in 2010 (U.S. Census Bureau, 2012). Since 2009, Spanish exports have been recuperating in the United States market and the Graph 1 shows a stable and sustained increase (ICEX, 2013).

Graph 1. Spanish Exports to the U.S. (in miles of €)



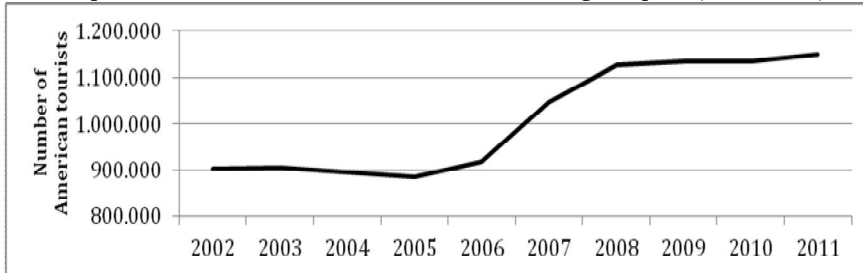
Source: Authors' elaboration; adapted from ICEX, 2013

Tourism

In addition to exports, tourism is another sector that can be positively influenced by a strong country brand. Spain's tourism sector has always been a strong point of the Spanish economy due to the widespread appeal of the Spanish culture and climate, however, when combined with place brand efforts to update and improve the image of Spain in the United States, the idea is that American tourism to Spain will also rise. Knowledge of Spanish food products and fashion, familiarity with the different regions and landmarks of Spain, and the growing popularity of learning Spanish as a second

language are all factors that may influence Americans to choose Spain as a travel destination (Chislett, 2005; Noya *et al*, 2008). The increase in American tourism from 2005-2008 was quite significant, and though the increase has slowed since 2008, the total amount of American tourists in Spain has continued to increase (Graph 2).

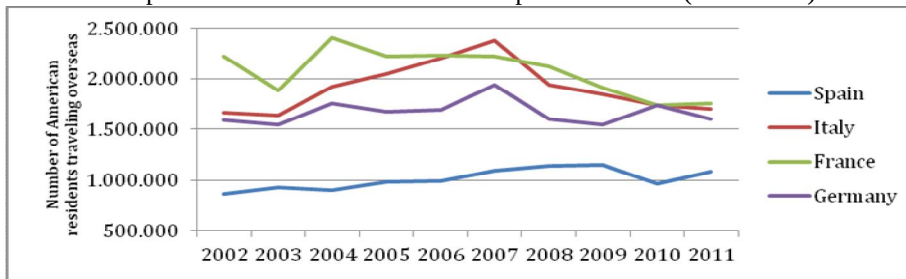
Graph 2. Total Number of U.S. Residents Arriving in Spain (2002-2011)



Source: Authors' elaboration; adapted from Turespaña, 2012

Spain, however, remains a less popular destination than other countries in Europe with similar characteristics (population, size, UNESCO world heritage sites, museums, diverse geography, etc). The data shows that there are Americans with disposable income travelling in Europe, either for leisure or work, but that Spain is not the top destination priority (Graph 3). This is an opportunity for Spain to reach out more travelers and increase tourism. First-hand experience with the country creates a more concrete place image for Americans, and travelers to Spain can disseminate their perceptions of the country to other potential tourists.

Graph 3. U.S. Resident Travel to European Countries (2002-2011)



Source: Authors' elaboration; adapted from U.S. Department of Commerce, 2012

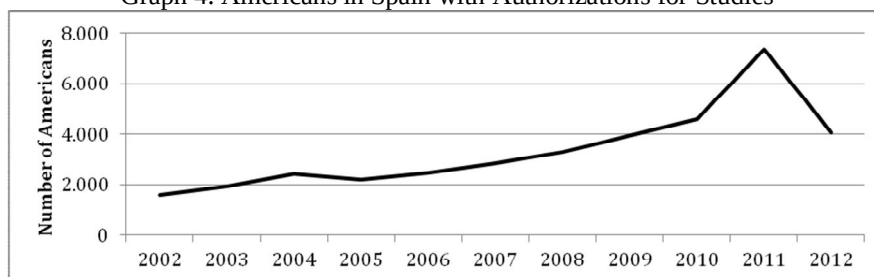
Exchange Students and Expatriates

In the globalized economy, countries now compete in attracting people to live, work and study within their borders. A country's appeal depends not only on cultural factors, but also how the foreigners perceive the quality of life in the country, the country's economic situation, and the opportunities that foreigners have in the country (FutureBrand, 2012). A strong and positive nation brand attracts skilled foreign workers as well as foreign students, who will acquire first-hand experiences in the nation and will share these experiences, positive and negative, with their friends and family at home, who in turn use the information to create and sharpen their perceptions and images of the country. They also are potential, long-term consumers of the country's products, as first-hand experience is a deciding factor in consumer decisions. As we look into the

development of the number of American students and expatriates in Spain over the last decade, it is important to keep in mind the effect that a strong country brand has on attracting foreigners as a place to live.

In Spain, we can see that since 2002, Americans with authorization for studies has steadily increased, and in 2011 reached over 7,500 students (Graph 4). Not all students are required to receive authorization from the Ministry of Immigration: short and mid-term students can study in Spain with short-term Schengen study visas of up to 180 days without having to register in the Foreigner's Office. Most Americans with authorizations for studies are Americans that will be studying for more than 180 days in Spain. This steady increase over the past nine years shows Americans perceive Spain to be a positive place to live, and value Spain's universities as education centers. The North American Language and Culture Assistant program, a government-sponsored initiative to increase cultural dialogue and improve the bilingual education program in Spain, recruits approximately 2,000 American and Canadian graduates for a work-study postgraduate grant in bilingual education centers in Spain, which would account for some of the increase over the last five years (Ministerio de Educación, Cultura y Deporte, 2012). There was a steep decrease in 2012 of the number of Americans with Authorizations for Studies, but it will be necessary to track the evolution of these figures to determine if this is a sustained trend in the next few years.

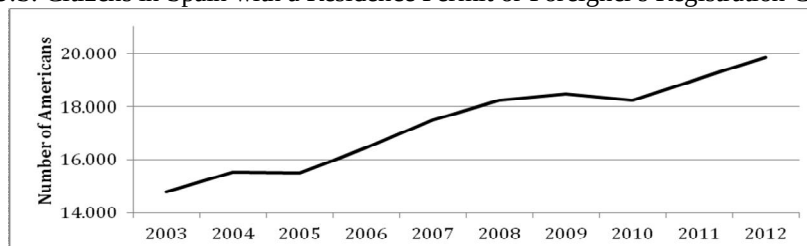
Graph 4. Americans in Spain with Authorizations for Studies



Source: Author's elaboration; adapted from Secretaría General de Inmigración y Emigración, 2013

By measuring the number of Americans with residence permits, we can interpret the data to understand how Americans perceive Spain as a place to live and work. Data available since 2003 also shows a steady increase in American expatriates in Spain. The data shows that a growing amount of Americans are choosing to live and work in Spain, even despite the economic situation since 2008 (Graph 5).

Graph 5. U.S. Citizens in Spain with a Residence Permit or Foreigner's Registration Certificate



Source: Authors' elaboration; adapted from Secretaría General de Inmigración y Emigración, 2013^a

Since 2002, the image of Spain has become familiar and attractive enough to cause an increase the number of Americans studying and living abroad during the 10-year period. This indicator implies success on behalf of nation branding attempts to attract and increase immigration to a country.

American Direct Investment in Spain

Foreign Direct Investment is an gauge of the international economic attractiveness of a country, and the amount of FDI in a country determines its economic growth and competitiveness. As a developed country, Spain can no longer compete as a low-cost investment destination, and has had to shift its focus to more advanced sectors, where higher education levels and technological capacity add value to the investment. Spain, overall, is an attractive destination for FDI. It boasts an "overall favorable business environment, top class physical infrastructures, a highly skilled labour force, an extremely dynamic domestic market and a sophisticated demand with high purchasing power, as well as an environment that facilitates the attracting of talent and R&D activities" (ESADE and Invest in Spain, 2010: 4). In addition, it is a geographically strategic position for countries looking to access the market in the EMEA region (Europe, Middle East and Africa) - a market of over 1.3 billion consumers (Invest in Spain, 2012)

Spain, however, has weaknesses that currently deter some companies from investing in Spain. The high level of unemployment and the inflexibility of the labor market are two areas that need to improve in order for Spain to become more competitive. Legal security is another area where Spain ranks less than favorably in the ESADE study: it maintains an average ranking, and though it ranks better than Russia, India, Italy and Greece, Spain provides less legal protection to companies investing in it than countries like Romania, Poland, Portugal, China and Mexico. Investments in R&D and office rental costs are two additional expenses for companies when deciding whether to invest in Spain which are lower in other, similarly developed countries. Despite these areas for improvement, Spain ranks seventh among OECD countries as a country with few FDI restrictions (OECD, 2012), and ranks fifteenth in the world for receiving foreign investment (United Nations Conference on Trade and Development, 2011).



Source: Author's elaboration; adapted from U.S. Department of Commerce, 2012a

American investment in Spain has increased steadily since 2002. As to be expected as a result of the global financial situation, investment has slowed since 2008 and even showed a slight decrease in 2010, but has followed a generally positive trend since 2002 (Graph 6). Spain has successfully branded itself to the United States as a good investment location, which is supported by real efforts to provide good infrastructure, a qualified workforce, top ranking business schools, and a competitive business environment, as well

as its attractive lifestyle. Spain will have to maintain these competitive advantages and stay ahead of their competitors if it seeks to continue attracting FDI.

5. Conclusions

Place branding is an important tool for modern, global governments, and finding a way to evaluate the results of place branding efforts will be critical to its success. Ongoing debate within the field as to the measurability of place branding campaigns demonstrates the need for a way to quantify the success of a project. By identifying the objectives of a specific country brand project and a target audience, we can collect real data on the sectors that a place brand aims to influence. In defining a specific time period, we can distinguish trends that show whether or not the country branding campaign has helped to influence the relations between countries.

The Brand Spain Project is an ongoing effort to improve the image of Spain abroad that involves various public and private institutions. Though Spain's overall image promoted is the same around the world, in some places, like the United States, where the Spain brand is generally unknown, special effort is needed in order to update and redefine the image of Spain. By creating a clear and concise image of the Brand Spain and familiarizing the audience with the brand, consumers can identify with Spanish products, be more receptive to news about Spain, choose Spain as a vacation destination, study abroad destination or place to live, or as a place to invest in. In addition to the efforts of the Brand Spain Project, "the change in the national image in Spain is the result of fundamental changes in its political, economic and social systems which have taken place over the past 20 years or so, not the result of some wishful campaigns in nation branding" (Fan 2005:11). The success of the Spain brand, and its ability to grow in the future, resides in the underlying progress of Spain's transition to a developed country and its capacity to share its "new" reality with the world.

Since 2002, the evolution of American trade, tourism, students and expatriates, FDI with Spain has increased steadily. This increase coincides with the implementation of the Spain Brand Project, which outlined objectives and recommendations for redefining and updating the Spain Brand abroad. We have observed that there is an increase in bilateral relations within our target public, and can extrapolate these findings to conclude that the Spain Brand is achieving its goal of defining its image in the United States. Areas of improvement for Spain include increasing its market share in the tourism sector, and improving economic and labor conditions to attract FDI. A comparison of the bilateral trends between the United States and Spain prior to the implementation of the Spain Brand Project would provide an interesting insight into the influence of the Place Brand campaign. The holistic approach of evaluating data from various sectors demonstrated in this study can be employed by countries looking to evaluate their country brand efforts abroad.

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