

Study Swissness Worldwide – Summery

The Swiss cross: a purchasing motive

Swissness Worldwide study: Brand Switzerland enjoys an excellent reputation worldwide

Swiss products and services continue to enjoy great popularity at an international level. They are regarded as particularly reliable and of high value but are less strongly associated with innovative energy and trend orientation. Negative appraisals of Switzerland are largely based on political positions and a critical perception of the financial center. This has been revealed by a study entitled Swissness Worldwide, which was conducted by htp St.Gallen and McCann Erickson in cooperation with the University of St.Gallen. More than 8,000 people from almost 70 countries were interviewed.

As early as 2006, htp St.Gallen and the Institute for Marketing and Retailing of the University of St.Gallen published a study entitled *Positionierungspotential Swissness*, which was based on a survey carried out in Switzerland and Germany. Subsequently, the focus increasingly shifted onto the global perception of Switzerland as a brand. However, there was no comprehensive and well-founded database that would be able to provide information about Switzerland's image in the world. To close this gap, htp St.Gallen and McCann Erickson cooperated with the University of St.Gallen to conduct the present *Swissness Worldwide* study, which explores the perception of Switzerland, its products and enterprises.

High quality of life, high level of prices

A designation of Swiss origin is extremely valuable, not only in Switzerland but in the whole world. Switzerland as a country is viewed in a very positive light. This image is primarily based on the good Swiss products and services, the beautiful landscapes, and the country's political stability. Switzerland stands for a high quality of life, reliability and trustworthiness. Critical remarks are less frequent and particularly concern the country's degree of openness to the world, which is perceived as rather low, as well as the high level of prices. A restrictive treatment of foreign nationals and dubious activities in the financial sector are further negative points.

The image of Switzerland is largely consistent in Europe, North, Central and South America, as well as in Asia and Oceania. The immediate neighboring countries Italy and France, however, give Switzerland the lowest grades in comparison. There is a tendency for the image of Switzerland to become more and more of a cliché as the geographical distance increases.

High value, but little innovation

Swiss products and services enjoy an excellent reputation worldwide. In comparative terms, no other country's products are perceived so favorably. They are considered to be particularly reliable, of high value and luxurious, and are therefore also associated with a correspondingly higher price – but less so with innovative energy and trend orientation.

The images of Swiss products and products from benchmark countries such as Germany, the USA and Japan have changed only slightly since 1991; all in all, assessments reveal a faintly positive trend. In this comparison, German products as a whole are only marginally less well assessed than Swiss ones. In comparison with Japan, Switzerland is ahead in terms of top achievements; when it comes to innovation, however, the Swiss are thought to be less capable. The USA is only mid-table in this comparison, whereas China lags far behind in terms of product quality and is only able to score on the price axis.

As regards industries, Switzerland primarily stands for chocolate and cheese, as well as for watches and banks. Conversely, the Swiss pharmaceutical and machine-building industries only mean something to people who are more familiar with Switzerland as an economic center. Fashion and IT are hardly ever associated with Switzerland.

An appeal to enterprises and politics

Brand Switzerland is less influenced by concerted communication or specifically targeted brand management; rather, it is Swiss companies' conduct that provides the main impact. Swiss goods, products and brands have had the greatest influence on the positive image of Switzerland. The management of Switzerland as a brand is thus taken on daily by all the actors who present themselves as Swiss. Being aware of this responsibility and acting accordingly is the very core of a healthy Brand Switzerland. This is also a clear-cut appeal to politics, for the study has shown that negative judgments of Switzerland are largely based on political positions – even ones that are long past – and on a critical perception of the financial center.

As regards positioning, Swiss enterprises and Switzerland as a country are thus in a relation of mutual dependence. Swiss products and services are associated with the attributes that have been revealed. They are beneficiaries, as it were, of Brand Switzerland's account. At the same time, however, all the individuals and companies that present themselves as Swiss make payments into this account by means of their activities and actions. As long as the players' activities are in line with the Swiss image, they reinforce Switzerland as a brand, and they weaken it as soon as this is no longer the case.

Brand protection

With reference to the first point, the most important symbol for the identification of Swiss products and services is the Swiss cross. Moreover, Swiss products are recognized on the strength of their designations of origin such as "of Switzerland" and "Swiss Made". A certain significance must also be accorded to typically Swiss motifs such as the Matterhorn, mountainscapes and cows. Other symbols, like the cross-bow that enjoys intermittent support, are of hardly any relevance in international terms.

A recently launched bill stipulates that the share of production costs accruing in Switzerland must amount to at least 60 percent for a product or service to be entitled to be called Swiss. In the interviewees' opinion, this share should be rather higher, namely 60-70 percent for commodities, and for development and production even 70-80 percent.

Interview

- Online interview with about 45,000 people; invitation to participate in the survey by e-mail
- Worldwide in nine languages
- 8,007 interviewees from 66 countries (response rate: 18%)
- Field time: January-March 2008

The complete study is available from the Institute for Marketing and Retailing at the University of St.Gallen (HSG):

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