

Documento de Trabajo

Working Paper

**From Sun to Crescent: Spain's Current Image in the
United States, Turkey and the European Union**

Javier Noya

8/5/2007

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Summary

Based on analysis of the latest international statistics on the image of countries we can conclude that in recent years Spain's image in the world has improved. Spain is even one of the most highly-valued countries in the US, where there has not been a negative effect following the withdrawal of Spanish troops from Iraq. Furthermore, the fact that its image in Turkey is better than that of France shows that Spain has emerged unscathed from the clash of civilisations. In addition, in Europe it is now no longer simply associated with sunshine and the beach. It is now perceived as a strong economy, and the amalgamation of these two factors, quality of life and economic power, has made Spain the most attractive place to work for Europeans.

Introduction

How has Spain's image abroad altered in recent years? It is a well-known fact that its international presence has undergone significant ups and downs as a result of the break in the foreign policy consensus that occurred under the second PP government and the electoral change after the 11 March terrorist attacks. The repercussion of these changes on our image abroad has been, and remains, a polemical issue amongst the political parties and in the Spanish media.

A range of business developments, including the foreign expansion of Spanish companies and the battle for control of the Spanish company Endesa, have also made the country more visible in Europe. Because of the work of the Foreign Press Observatory at the Elcano Royal Institute we are aware that these developments have had an impact on public opinion in European countries.

In the present study, we shall analyse the latest international data on countries' images, with the aim of assessing the impact that these events have had on public opinion abroad. The surveys we have consulted, in descending order in terms of the size of their geographical scope are:

- The latest wave of the Anholt Nation Brands Index (henceforth NBI).¹
- The 2006 Transatlantic Trends survey (henceforth TT-2006).²
- The Financial Times/Harris Poll (henceforth FT/Harris).³

It is important to reiterate that although Spain's visibility has increased, the respondents of all of these surveys are average citizens of the countries in which they are carried out, as opposed to opinion formers or political or business elites, and this necessarily means that the level of information used in making judgements on Spain is lower. Nevertheless, analysis of the statistics reveals an initial finding that is crystal clear.

¹ For the last quarter of 2006, carried out in 38 countries, across the five continents.

² Carried out in the EU countries plus the US and Turkey.

³ Carried out in five European countries: Germany, France, Spain, Italy and the UK.

Spain's Image has Improved in Recent Years

In the Simon Anholt Nation Brands Index, Spain comes 12th out of a total of 38 countries, and therefore occupies a position in the top third of the table. It is ahead of countries such as Belgium, Denmark and Norway, but also Russia, and in the same range as the US and the Netherlands, with which it is level on points. Spain's score is actually double that of the bottom-placed countries with the worst image (Israel and Iran).

Country	Ranking	the NBI	Country	Ranking	the NBI
UK	1	131	Brazil	20	109
Germany	2	128	Russia	21	107
Canada	3	128	China	22	106
France	4	127	Argentina	23	105
Switzerland	5	126	Czech Republic	24	105
Australia	6	125	Hungary	25	104
Sweden	7	125	Poland	26	104
Italy	8	125	Singapore	27	103
Japan	9	125	Mexico	28	102
US	10	124	India	29	102
Netherlands	11	123	Egypt	30	102
Spain	12	123	South Korea	31	101
Denmark	13	121	South Africa	32	99
Norway	14	121	Malaysia	33	97
New Zealand	15	118	Estonia	34	97
Ireland	16	116	Turkey	35	96
Belgium	17	115	Indonesia	36	94
Portugal	18	114	Israel	37	94
Iceland	19	110	Iran	38	77

Source: NBI.

How has Spain's image evolved since the first NBI measurements?

What is interesting is to analyse Spain's relative position compared to similar countries, in view of the fact that the number and type of countries on which questions are asked (the basis for the survey) has changed.

	Rank 2004 (out of 25)	Rank 2006 (base: only the same countries as in 2004)	Evolution 2004-06
Australia	1	6	-5
Canada	2	3	-1
Switzerland	3	5	-2
UK	4	1	+3
Sweden	5	7	-2
Italy	6	8	-2
Germany	7	2	+5
Netherlands	8	11	-3
France	9	4	+5
New Zealand	10	13	-3
US	11	10	+1
Spain	12	12	0
Ireland	13	14	-1
Japan	14	9	+5

Source: NBI.

At first glance, it seems that Spain's position remains the same as in 2004, since three years ago it was 12th out of a total of 25 countries. This would make it different from countries like Germany, France and Japan, which have climbed as much as five positions. According to this reading, Spain has not improved or worsened: it has simply remained in the same place.

However, this would not be a correct interpretation of the data, because the 2004 list was calculated based on 25 countries, while in 2006 there were 38. Obviously, coming 12th out of 38 is not the same as coming 12th out of 25.

Furthermore, if we consider the index scores, as opposed to the country rating, the truth of the matter is that in maintaining 12th position, Spain's index actually registered an improvement. Between the end of 2005 and the end of 2006 Spain's score in the Anholt Index rose by two-and-a-half points, making our country one of those whose image improved the most, alongside Germany and Brazil, and well above countries like China, which suffered a significant loss.

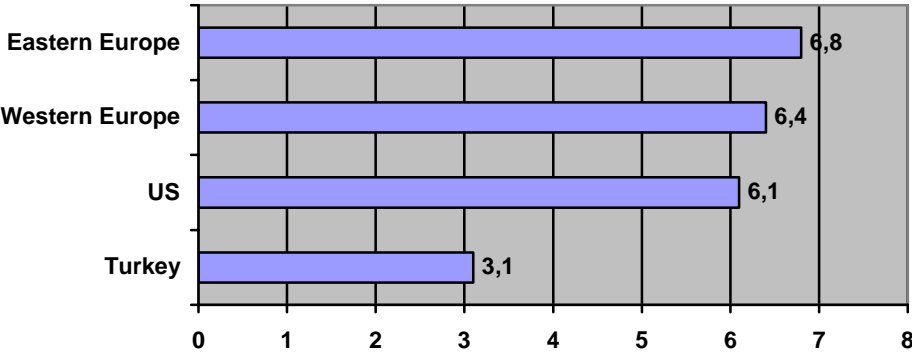
Countries	% growth NBI 2005-06
Netherlands	2.8
Brazil	2.6
Spain	2.5
Germany	2.3
United Kingdom	2.2
Sweden	2.1
Switzerland	2.1

Source: GMI, Anholt Nation Brands Index, Q4-2006.

It might be countered that when the NBI was launched the Latin American countries were not included, whereas now citizens from Mexico, Argentina and Brazil are also polled. But this still would not explain Spain's rise, since this argument only refers to three nations out of a total of 30. Thus, we can affirm without fear of being mistaken that *Spain's image in the world has significantly improved in the last three years.*

Spain Avoids the Clash of Civilisations

In the TT-2006, which rates countries from 0 to 10, Spain obtains its highest score in the eastern European countries, at almost 7 (6.8 to be exact). Its next highest rating is the mid-high score obtained in western European countries, at 6.4.



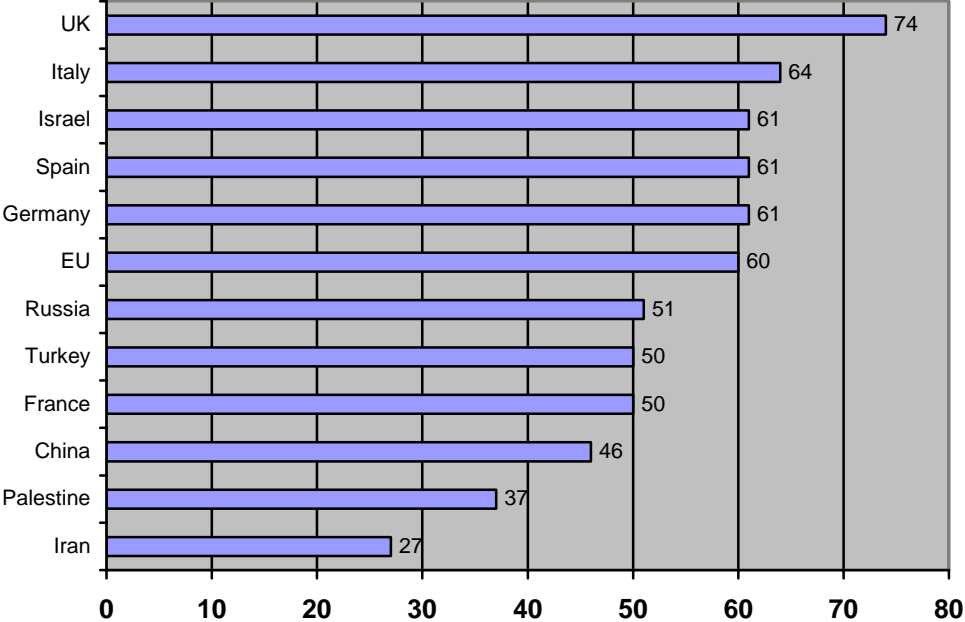
Note: the original scale of the TT-2006 survey is from 0 to 100. We have therefore divided the original index by 10 in order to achieve a mark from 0 to 10.
 Eastern Europe = Poland, Slovakia, Bulgaria and Romania.
 Western Europe = France, Germany, UK, Italy, the Netherlands and Portugal.
 Source: TT-2006 and our own calculations.

As had been the case in the TT-2005, its rating in the US is exactly the same as the European score, which is further evidence of the fact that Spain's image in the US has not been adversely affected by the withdrawal of Spanish troops from Iraq and the lukewarm relationship between the countries' political leaders

In fact, a more detailed analysis of the rating of different countries in the US reveals that Spain is a member of the group of countries held in the greatest esteem in the US. In the ranking that we can establish from the TT-2006 statistics, Spain is the third most highly thought of country. It is in the group consisting of Israel, Germany and the EU as a whole, and only the UK and Italy are ahead of it.

Thus, the withdrawal of Spain’s troops from Iraq has not led to deterioration of its image in the eyes of the average American citizen. The image of Spain in the US is better than that of France, although we should take into account that the latter is still suffering from the after-effect of its own open opposition to the war in Iraq; since its image before the war was better.

Rating of different countries in the US

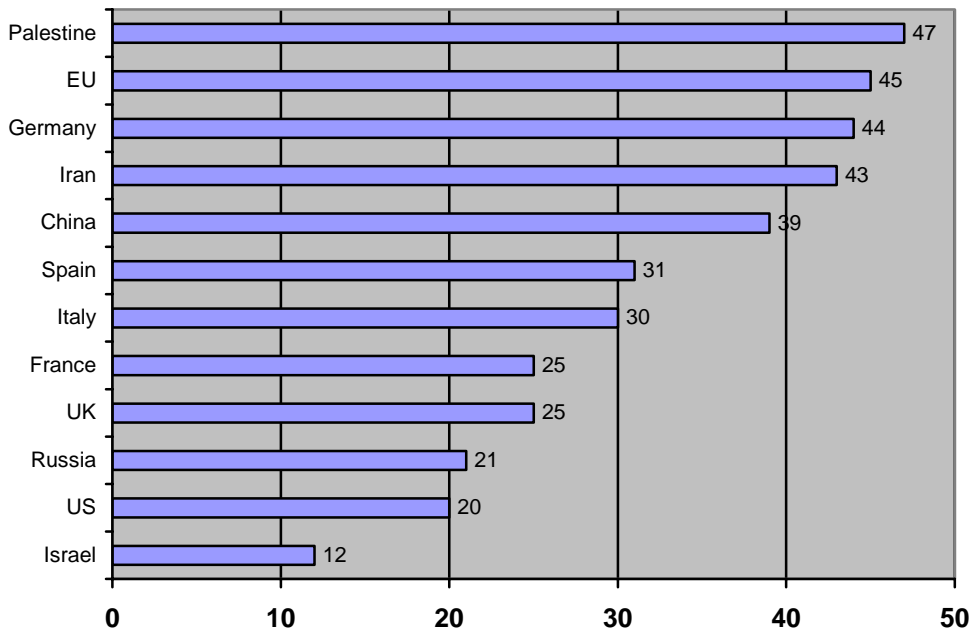


Source: TT-2006.

Returning to the previous comparison –Spain’s image in different regions (Europe, the US and Turkey)–, the only exception in terms of Spain’s good rating is Turkey, where it only obtains a mark of 3.1 as opposed to its average European mark of 6.6 –or 6.1 in the US, as we have just observed–.

Why is Spain’s image so negative in Turkey, a country which is, when all is said and done, Spain’s main partner in the ‘Alliance of Civilisations’? All the evidence would seem to indicate that ‘it’s nothing personal’. The fact is that Turkey rates everyone badly, absolutely all the 12 states, supra-state organisations (like the EU) and quasi-states (like Palestine) about which the TT-2006 poses questions; none of them even achieves a basic pass score of 5. There seems to be a ‘Turkey versus the western world’ syndrome. The Turks, just like survey participants elsewhere, had to rate Muslim and non-Muslim countries, and it seems that the citizens of Atatürk’s nation are not at home with either of the religious blocks.

Rating of different countries in Turkey

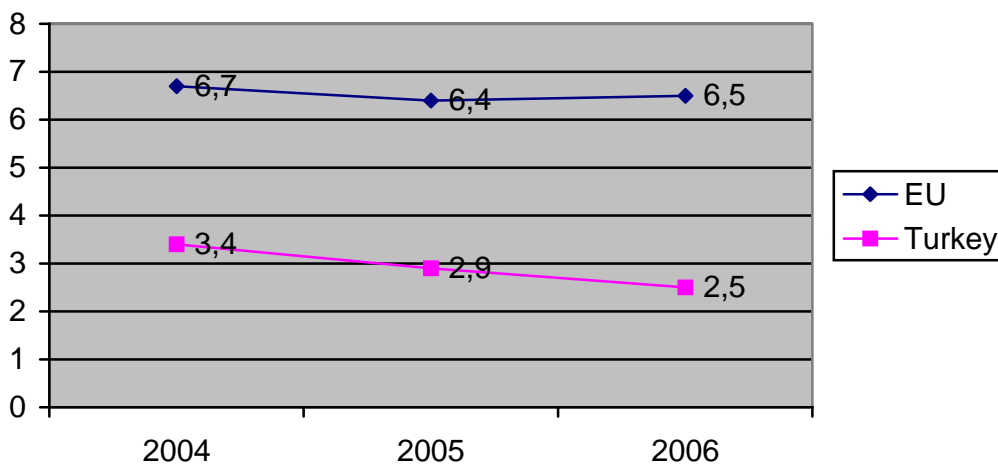


Source: TT-2006.

It is true, of course, that the Palestinian Authority and Iran, at 4.7 and 4.3, respectively, are closer to a pass mark of 5 than Israel, the worst-rated country, with a score of 1.2. They are also better perceived than the invaders of Iraq: the US, which is rated at 2, and the UK, at 2.5. But the scores of the US and the UK are almost the same as that of Russia. So it would seem that the Turks are more affected by a widespread anti-westernism than by the Iraq issue.

However, this anti-Americanism is not the same thing as a clash of civilisations. In fact, Spain's image in Turkey is better than France's, a nation which has stood out for its republican attitude towards the integration of Muslims (banning of veils etc.) and at times for a straightforward anti-Turkish public opinion ('no' to the European constitution, the Armenian genocide etc.). These events in France have an effect on Turkish public opinion and explain why its rating fell by almost a whole point from 2004 to 2006; a fall that did not affect the average rating for the EU.

France's rating in the EU and Turkey, 2004-06



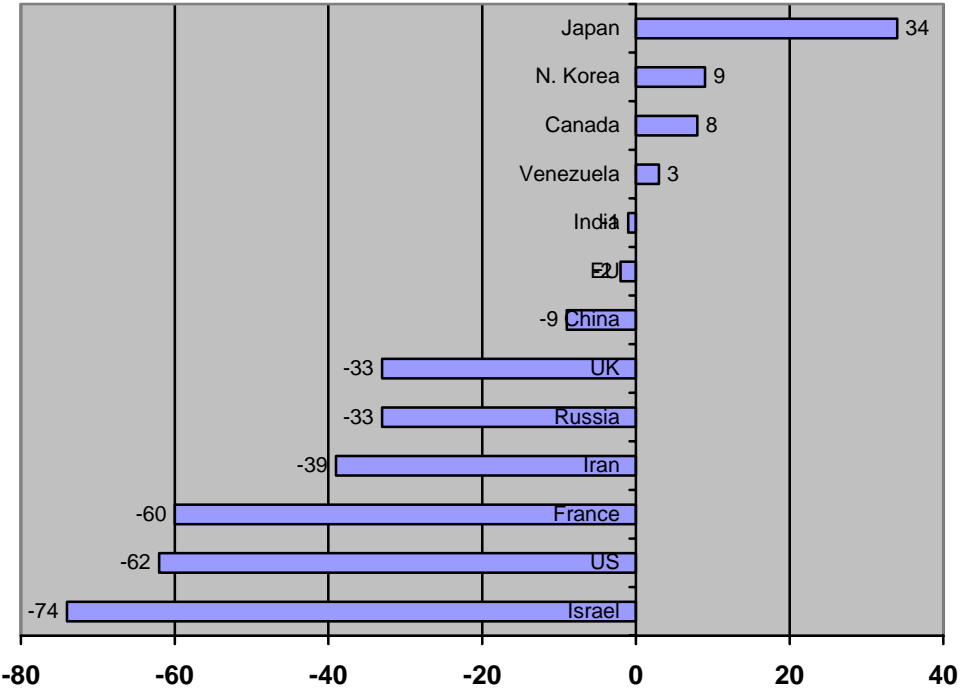
Source: TT-2006.

The statistics from a different source, the PIPA/Globescan poll, carried out in March 2007, after the TT-2006, serve to confirm the nosedive of France’s image in Turkey. Two out of every three Turks have a negative image of France; identical to the percentage for the US.

This survey also reflects the fact that there is less rejection for the EU as whole: 32% of respondents considered its influence in the world to be negative and 30% believed it to be positive. Turkish public opinion is polarised.

It can also be seen that, as in the results from the TT-2006, the Turkish respondents to the PIPA/Globescan poll considered Iran’s influence to be negative. This is completely different from the situation in Indonesia and Lebanon, where there is a better feeling towards Iran.

The rating for different countries in Turkey



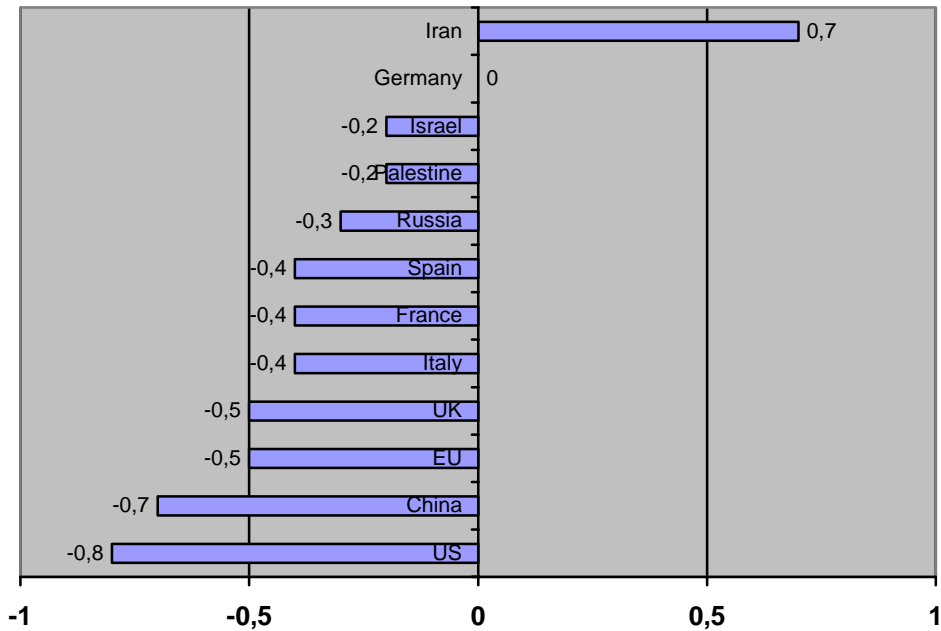
Note: index obtained by deducting the percentage of negative responses from the percentage of positive responses. Source: the PIPA/Globescan poll and the author.

To return to our main interest, and also to the TT-2006 figures, we can conclude that Spain’s image in Turkey is better than France’s. Spain’s rating is nevertheless worse than that of Germany, the country with which the Turks are best acquainted, since it has the largest Turkish community. The latter two countries opposed the Iraq war, but in Turkey they have different images. Thus, neither a seismic macro-effect caused by the clash of civilisations or ‘simply’ the Iraq war explain attitudes in Turkey. More complex variables, such as social links –in the case of Germany–, and political initiatives, such as Spain’s ‘Alliance of Civilisations’ are more able to explain this effect.

We might hypothesise that it is precisely the ‘Alliance’ that has contributed to softening the effects for Spain of another process. While Iran’s image has improved in Turkey over the last two years, that of the western nations has worsened. Nevertheless, the deterioration of Spain’s image has been less than that of the US or that of the EU as a whole.

Thus, the ‘Alliance’ must have ensured that the worsening of western countries’ images in Turkey did not affect Spain to the same extent. Nevertheless, the European country that holds out the best is Germany. While the general rating for the EU fell by half a point, that of Germany remained intact, making it the most highly-valued western nation.

Evolution of the ratings of different countries in Turkey, 2005-06



Source: TT-2006 and the author.

Turkey's specific set of values –its anti-westernism, but also its anti-Islamism– explains the government's willingness to join the 'Alliance of Civilisations' through its cooperation with European countries like Spain, which are not hostile to Muslim countries but which are also not amongst the allies of the 'war on terror'.

It would not appear exaggerated to conclude that if it were not for the 'Alliance of Civilisations' Spain's rating would not be quite as high, essentially because people would have had less knowledge of the country. It should be borne in mind that Spain does not have the large Turkish community that Germany does.

Whatever the case may be, Spain's profile is different from that of European countries such as France or Germany.

The Balance of Soft Power and Spain's Social Capital

Up to now, we have only taken into account the image of countries abroad. But there are richer pickings if we also consider the ratings given by a country to other countries. Having a negative image in a xenophobic country, which would rate other countries negatively too, is not the same as having one in a xenophile country with a friendlier view of other nations.

Moreover, in including the opinion of the general public on foreign countries it will be possible for us to measure the level of reciprocity in the ratings, allowing us to gain an idea of the strength of bilateral links, in this case in NATO. It is only necessary to recall the case of Spain, its relations with the US and the Iraq war, to understand that public opinion can also be a powerful resource for a state in its bilateral relations with another state.

The columns show the scores given to other countries; and the rows display what each country received from each of the foreign countries. We have omitted the score that each country gave to itself, which, if it were included, would run diagonally in the cells with dashes.⁴

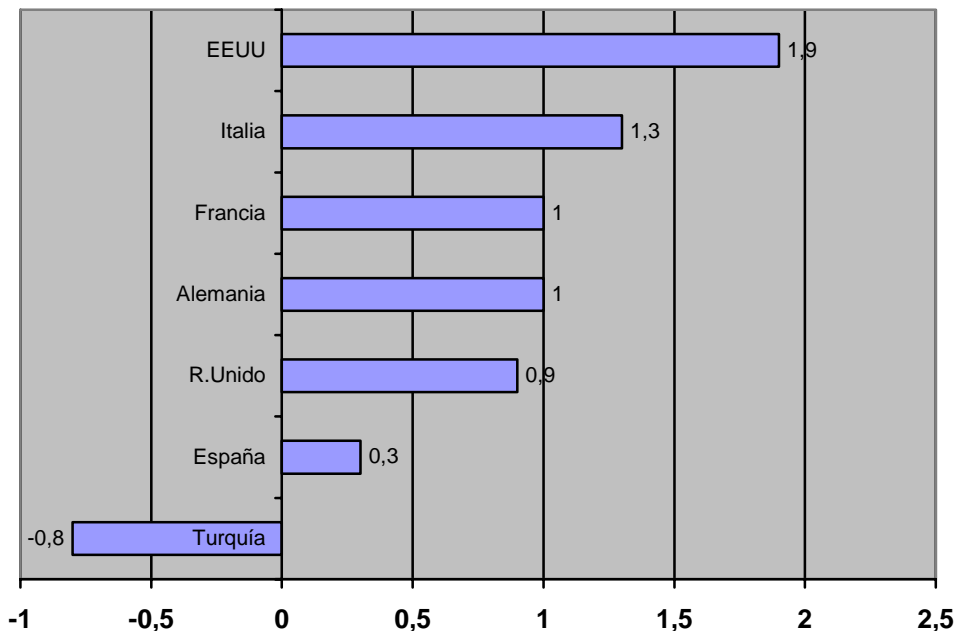
⁴ For this part of the analysis TT-2006 also allows us to study the relationships between seven countries, those in which the poll was carried out and those for which participants were asked for their opinion: the UK, France, Germany, Spain, the US, Italy and Turkey.

	US	France	Italy	UK	Germany	Spain	Turkey	
US	–	4.6	5.5	5.4	5.3	3.7	2	4.1
France	5	–	6.3	5.6	6.9	6.1	2.5	4.6
Italy	6.4	6.1	–	5.9	6.6	6.4	3	4.5
UK	7.4	5.8	6.1	–	6.3	5.3	2.5	4.7
Germany	6.1	6.7	6.3	5.7	–	6.3	4.4	5
Spain	6.1	6.7	6.7	6.1	6.8	–	3.1	5
Turkey	5	3.8	3.9	4.8	4.3	4.3	–	3.7
	6	5.6	5.8	5.6	6	5.3	2.9	–

Source: TT-2006 and the author.

The US and Germany, which give the other countries an average score of 6, are the most xenophile countries, ie, those with the best opinion of other nations. Turkey, as the most xenophobic, represents the other side of the coin, ie, the country awarding the worst scores –lower than 3 (2.9)–.

On comparing the overall image of a country abroad with that which a range of nations have of foreign countries, it can be seen that the US has an opinion of others that is much better than that which other countries have of the US: a difference of almost two points on the scale. Turkey is the other extreme; the country that views other nations worse than it is perceived by them.



Note: the index is the result of subtracting the rating given from the rating received.

Analysing the differences between countries, there is an initial result that is interesting. The distance between the US and Spain, 2.4 points, is the second highest of all those observed for the seven countries. The US appreciates Spain much more than Spain does the US. Only the distance between the US and a Muslim nation, Turkey, is greater.

The opposite pole is represented by the happiest couple, Turkey and Germany, with hardly any difference in their mutual scores (0.1).

	US	France	Italy	UK	Germany	Spain
France	0.4	–	–	–	–	–
Italy	0.9	-0.2	–	–	–	–
UK	2	0.2	0.2	–	–	–
Germany	0.8	-0.2	-0.3	-0.7	–	–
Spain	2.4	0.6	0.3	0.8	0.5	–
Turkey	3	13	0.9	2.3	-0.1	1.2

Note: the index is the result of subtracting the rating given from that received.

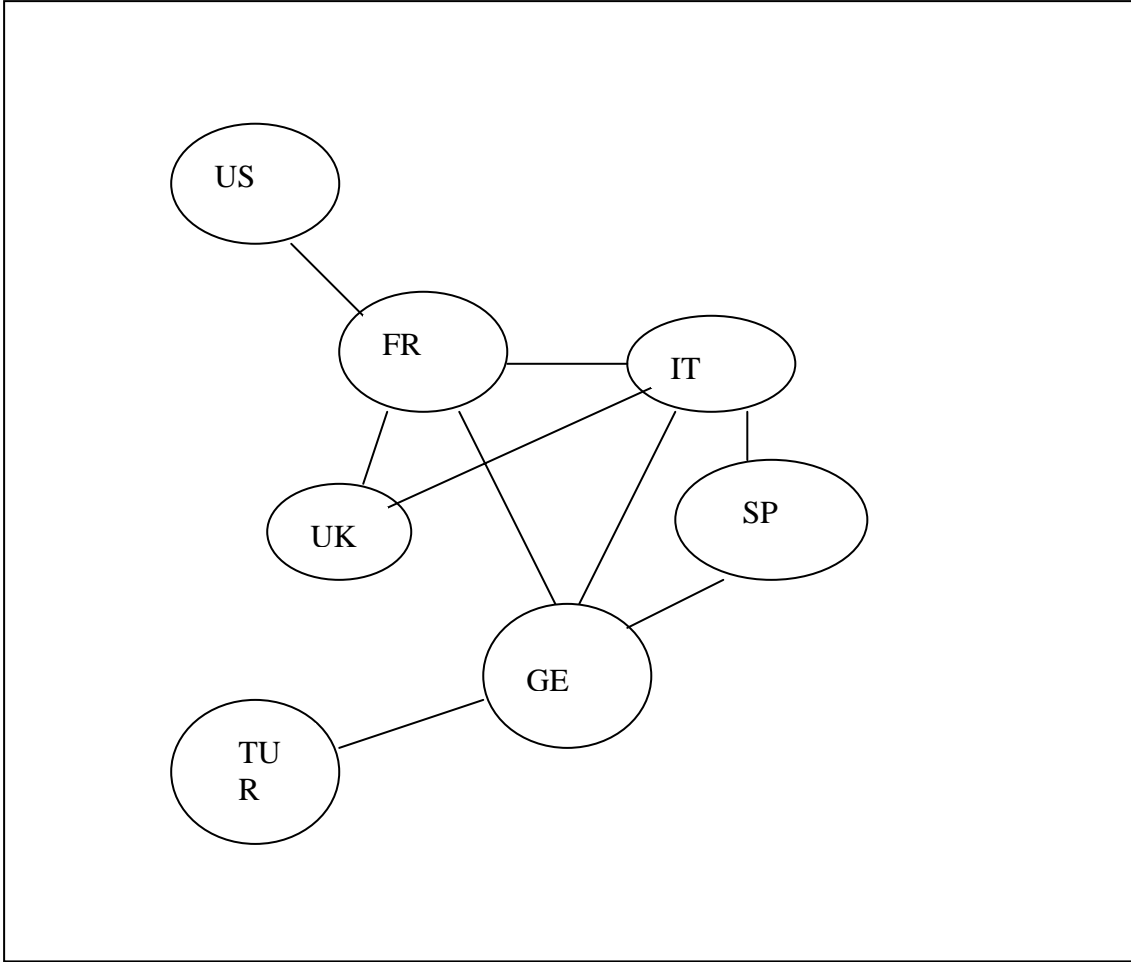
Taking into account the size of the difference, regardless of the particular case, it would be possible to produce a map in which proximity indicated symmetry.

Italy and France would be in the centre, given the balance between their public opinion and their image abroad; between how they rate others and how others rate them. The two European countries achieve reciprocity of outlooks in their relationships with other countries. They represent a soft power balance.

Spain would be part of the first ring, alongside Germany and the UK; a group comprising countries with slight imbalances. In the case of Spain, this is the situation because it receives more than it gives. Germany presents the opposite problem: it receives less than it gives.

Lastly, Turkey and the US would be in the outer ring: the former since it receives much more than it gives; and the latter because it receives considerably less than it gives.

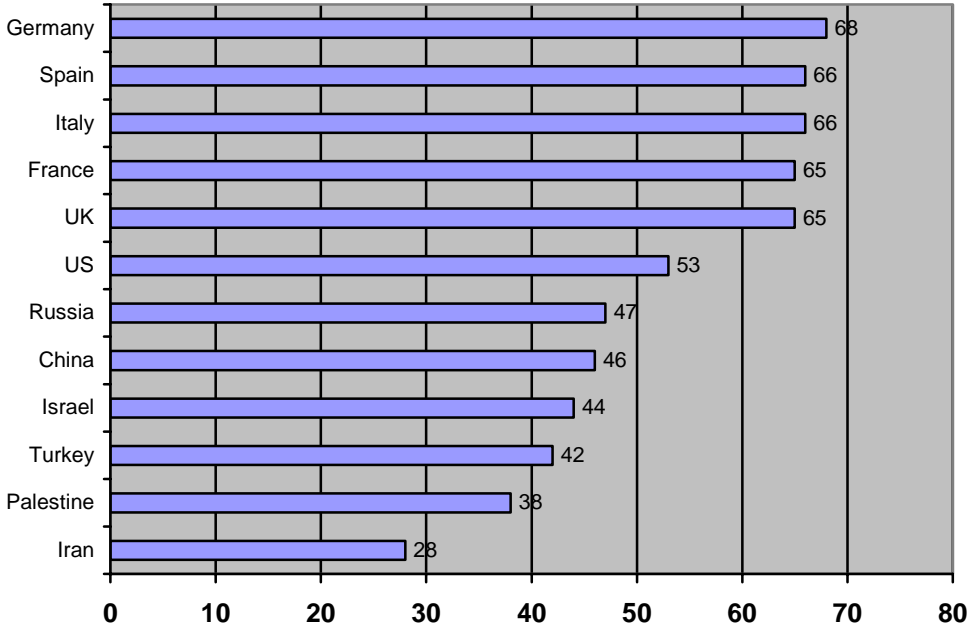
The degree of connectivity is higher the closer a country is to the centre, and these two nations on the periphery are therefore only linked to the nucleus by one bridge: France in the case of the US; and Turkey as far as Germany is concerned.



Something New Under the Spanish Sun

As noted, the above TT-2006 figures coincide with many others in pointing to Europe as the region with the most favourable image of Spain. This is natural, when it is considered that it is Spain’s natural area of influence, the region where it has the most presence, although it has less corporate activity and lower investment than in Latin America. However, this is something that in the UK, for example, is beginning to change. But we should make no mistake: knowledge about Spain is largely due to tourism. For decades, Spain has been the leading tourist destination for Europeans.

The rating of different countries in the EU



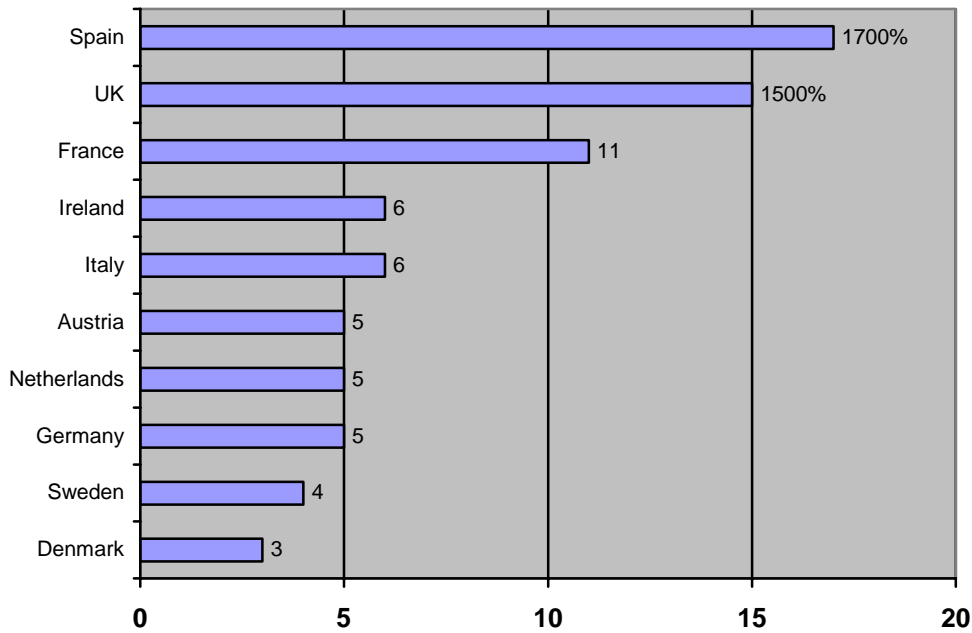
Source: TT-2006.

The TT-2006 shows that for European nations Spain is one of the most highly-valued countries on a global level, alongside the four EU giants (Germany, France, Italy and the UK).

Furthermore, it should be emphasised that the ratings are extraordinarily homogeneous. This positive perception of Spain hardly varies from one country to another, and this is not the case for countries such as the UK and France, which, although they are equally well valued, polarise opinions, or generate greater ambivalence in the public opinions of other countries.

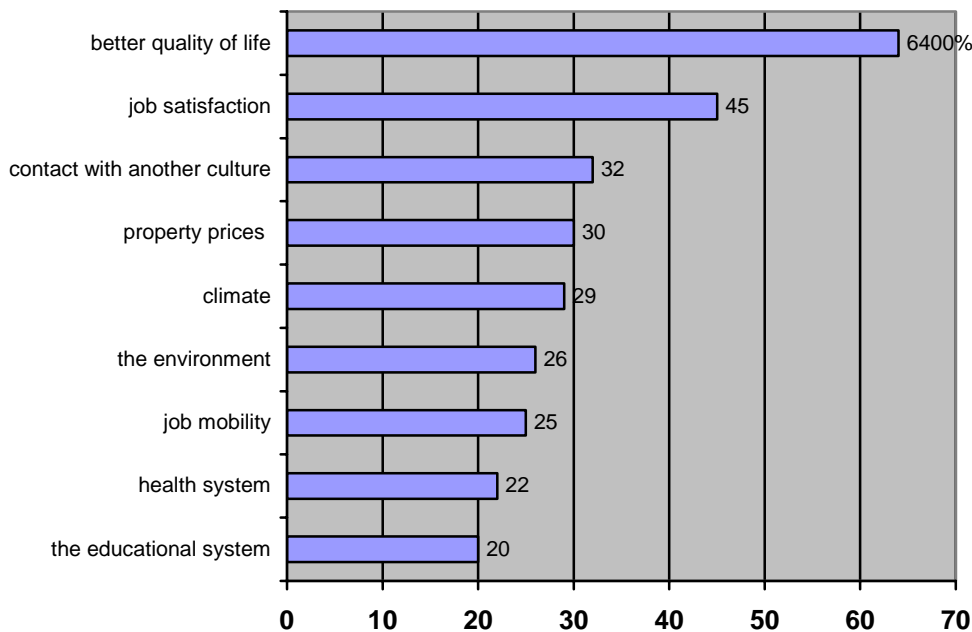
Why does Spain obtain such a high rating? Other recent statistics can provide some clues in this regard.

According to the FT/Harris poll, Spain is the top country for European citizens who emigrate for work reasons. Spain obtains 17% of the votes, in front of the UK (15%) and France (11%). Germany and Sweden are the least popular, only voted for by 5%.



Source: FT/Harris.

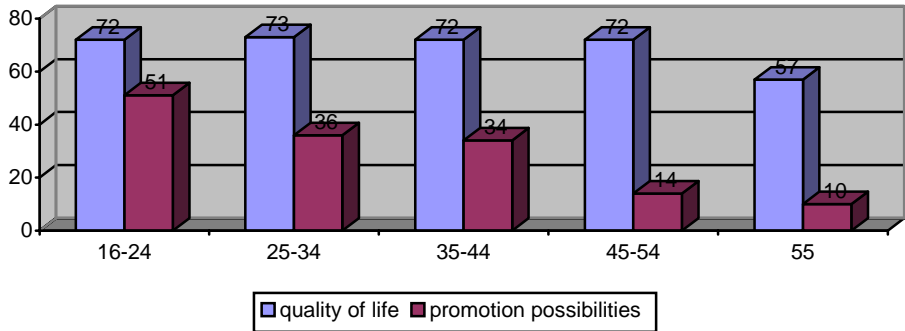
Why is Spain so popular when it comes to choosing a country to work in? It is easy to explain. For 64% of Europeans, the factor that would most persuade them to emigrate to another country is the 'quality of life'. 'Contact with another culture' (32%) and climate (29%) are also considered important.



Source: FT/Harris.

All in all, the quality of life is perceived as more than twice as important as job mobility or the educational system. Furthermore, it is a transnational effect: it occurs equally in the four countries in which the survey was carried out (France, Germany, the UK and Italy). It also spans the generational divide, being observed regardless of the age of respondents. For example, in Germany, the home of the Protestant work ethic, young and old alike view quality of life as an important factor in choosing to emigrate for work reasons. The degree of importance attached to promotion possibilities is something that does establish a difference between the age groups: it is a factor five

times more important for a young person starting out on his/her career than for an older person with fewer years left to work.

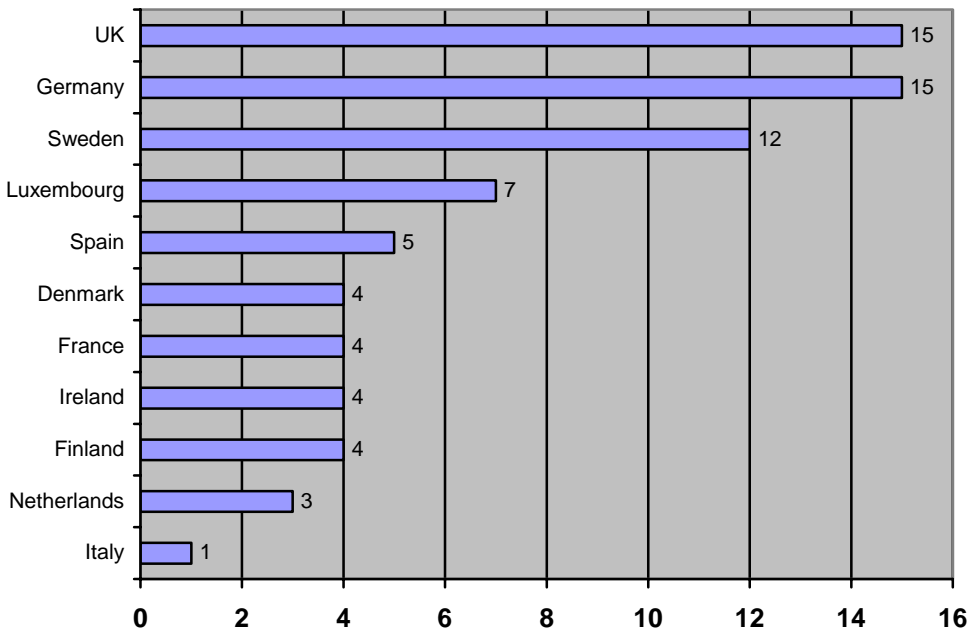


Source: FT/Harris.

It would be possible to undertake a simplistic reading of Spain’s image, and of the lifestyle of Europeans itself, in which the latter only opt for Spain because life is better there. But it would not be a correct reading, if account is taken of Spain’s advantage over Italy in terms of people’s preference for working abroad. It may be better understood in the light of other results from the poll.

In effect, the FT/Harris poll shows that for Europeans Spain is beginning to show signs of having a strong economy: Spain is presently fifth, and is chosen by 5% of Europeans. Of course, the European economic powerhouses are still the UK and Germany, which were selected by 15% of respondents. But Spain is currently perceived to be more powerful than France or Finland (4%).

Spain is beginning to close in on the economic leaders in Europe, to the extent of being on a par with France. As one English analyst stressed, in surprise at the result of the FT/Harris poll: ‘perhaps the poll’s most surprising finding is just how far Spain has emerged as an attractive country for foreigners, just 21 years after joining the EU as one of the poorest member countries’ (Parker, *Financial Times*, 18/II/2006).

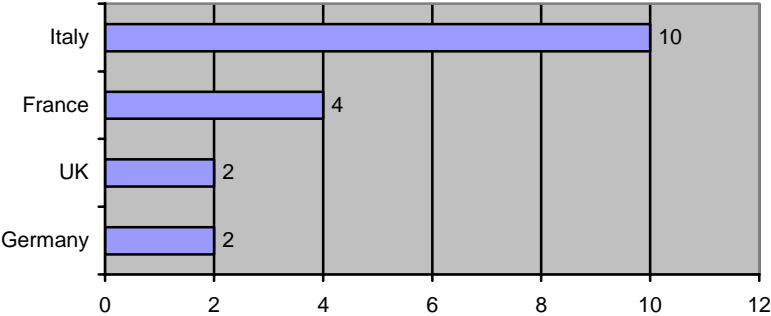


Source: FT/Harris.

If a more political aspect to the interpretation of these findings is sought, one which is always possible, it would appear clear. There has been a lot of deliberation on the impact of a number of recent corporate moves in the energy sector on Spain's image. However, the controversy surrounding the Endesa case actually appears to have strengthened Spain's image as a strong economy, whether because Spain is attracting foreign investors, or due to the fact that resistance to the take-over also suggested that the Spanish government was able to take on the German government. Further information would be needed to firmly go with one of these two possible explanations, but it does appear clear that, in any event, the Spanish economy is now more robust as a result of events.

In European public opinion, Spain has definitively broken away from Italy, which only 1% of Europeans now believe to be a strong economy. And, significantly, it is precisely Italy which is the country holding Spain in the highest esteem as a strong and healthy economy. The percentage of 10% of Italians who are of this opinion is double the European average.

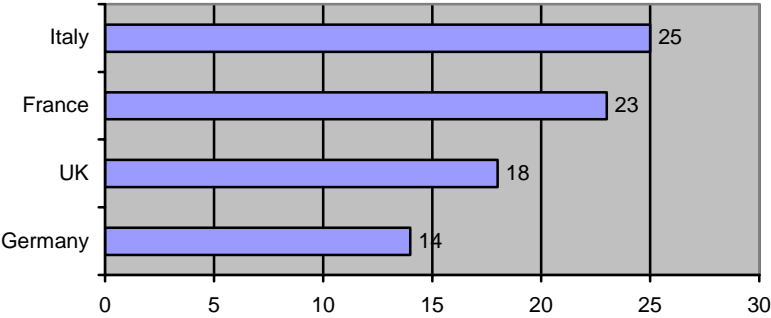
Percentage of Europeans who believe Spain is a strong economy



Source: FT/Harris.

Consequently, the percentage choosing Spain as the country where they would like to work is 25% in Italy, compared with 14% in Germany.

Percentage of Europeans who would choose Spain for work



Source: FT/Harris.

In summary, the combination of quality of life and a bullish economy differentiates Spain from Italy and explains why it is one of the ideal countries for working (and living). It would seem that there is something new under the Spanish sun, something more than sun and sand: a buoyant economy.

Conclusions

A series of pretty clear conclusions can be drawn from the study.⁵ Spain's image in the world has improved over the last three years. And following the withdrawal of the troops from Iraq, for instance, there has not been a negative effect in the US, where it is one of the most highly-rated countries.

In Europe, in the wake of the entry of Spanish companies, the country is beginning to be perceived as a strong economy. This new image adds to the traditional image of being a country offering quality of life. Since it manages to square the circle it is hardly surprising that it is seen as the ideal country to emigrate to for work! Spain is good for work and good for living. It is starting to become something more than sun and sand for Europeans.

Spain's positive rating in Europe is not mirrored in other parts of the world where, frankly, it has not yet arrived, or where the juncture of international politics is conditioning the image of the western countries; something that would seem to be the case in Turkey. In this largely Muslim country, Spain's image is not as good as in the EU countries.

Even adopting an apocalyptic point of view, it would still be possible to make a positive interpretation of Spain's image in Turkey compared with its image in other European countries. The good news is that Spain is considered to be just another western country! But it is not necessary to have recourse to the Panglossian paradigm, because, in any event, Spain is beginning to become known and to have a differentiated image. In all likelihood, due to the effect of the 'Alliance of Civilisations' initiative, its image in Turkey is now better than those of European nations like France and the UK.

Spain is in the throes of a transition from being *a sunshine country to a crescent country*: It is transforming itself from being just a leisure destination in the eyes of Europeans into a country which is respected; and it is also developing into a potential interlocutor for the moderate Muslim countries. It will never be a full-moon, a cold country like Germany, because it is associated with sunshine and heat, but it can become a 'half-sun' for the Europeans, and a desirable partner, 'a crescent', for the Muslims.

The implications of these results for the management of Spain's image abroad are also both clear and varied: in its 'crescent' public diplomacy, Spain must sell itself as having a quality of life, which, in addition to financial capital and human capital, has an abundance of *social capital*, in other words, as a culture that is tolerant and open to dialogue with other countries and cultures.

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⁵ Naturally, this descriptive analysis could be more sophisticated if it were carried out by means of quantitative network analysis techniques; a task we hope to carry out in a more academic work in the future comparing several data sources.