Mexico's Brand in the U.S.

NATIONAL SURVEY RESULTS – KEY FINDINGS

November 2012

GSD&M

vianovo

Study Background

Vianovo and GSD&M recently conducted a national poll of U.S. adults to gauge Americans' attitudes about the country of Mexico

The survey was fielded October 4-7, 2012

1000 adults (18+) were interviewed online via YouGov[1] (MOE ±3.9%)

1 YouGov is one of the world's premiere online research firms and operates an online panel of more than 1 million U.S respondents; data has been weighted to U.S. Census estimates for key demographics

Survey Roadmap

We investigated four key topics

1 **Overall image and associations**
overall, economy, security, associations

2 **Information flow**
how much, what, impact, where

3 **U.S-Mexico relationship**
past four years, view of, trade impact, future focus

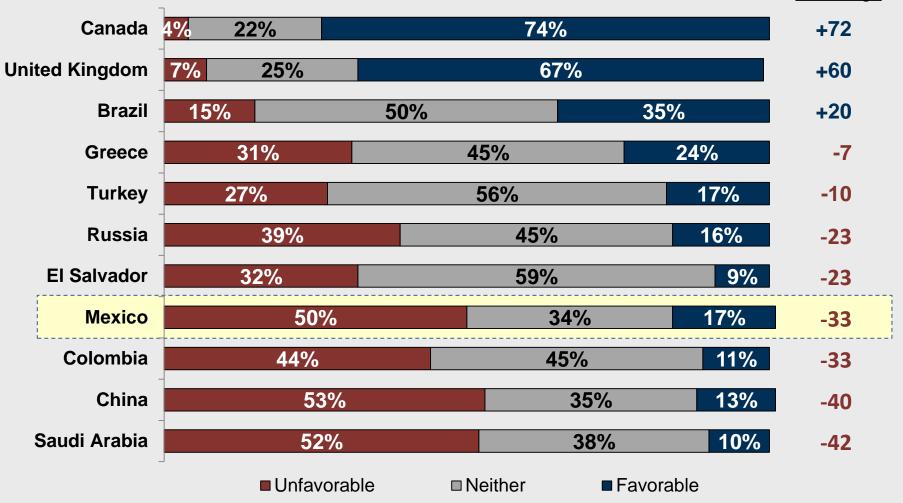**4** **Specific knowledge and perceptions**
economy, government, culture, security

Country Image Ratings[1]

Mexico's overall image in U.S. is similar to Colombia

Given what you know about the following countries, what is your opinion of each? [Randomize]

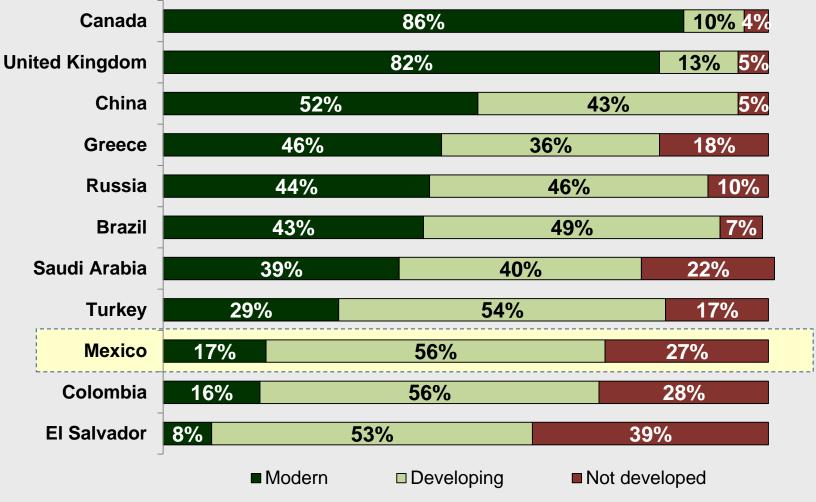| Country	Unfavorable	Neither	Favorable	Net Image
Canada	4%	22%	74%	+72
United Kingdom	7%	25%	67%	+60
Brazil	15%	50%	35%	+20
Greece	31%	45%	24%	-7
Turkey	27%	56%	17%	-10
Russia	39%	45%	16%	-23
El Salvador	32%	59%	9%	-23
Mexico	50%	34%	17%	-33
Colombia	44%	45%	11%	-33
China	53%	35%	13%	-40
Saudi Arabia	52%	38%	10%	-42

■ Unfavorable   ■ Neither   ■ Favorable

1 Unlike Gallup, our image question provides respondents a neutral midpoint (which signifies don't know, no opinion, in middle) – results suggest many who choose "favorable" in Gallup are actually neutral (and lean positive on a forced choice)

3

Views of Country Economies

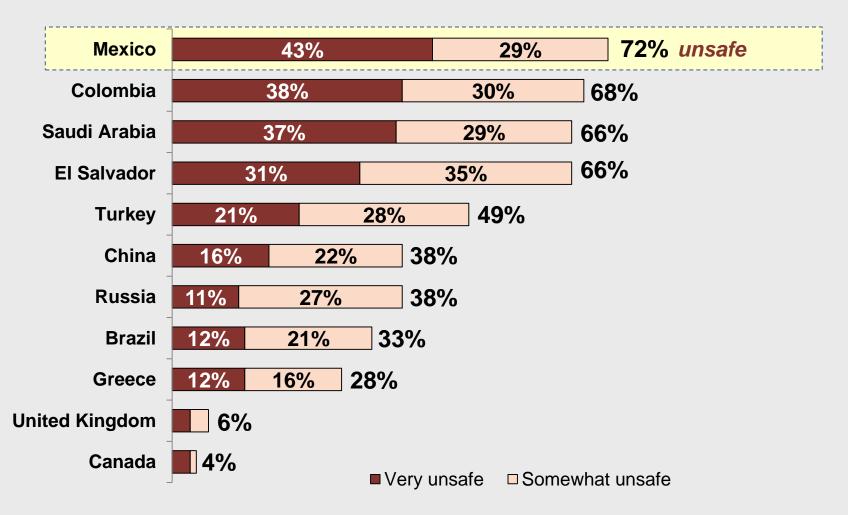## Mexico viewed as a developing economy, well behind Brazil, Russia

Again, thinking about those same countries, based on what you know, would you describe each of their economies as modern, developing or not developed? [Randomize]

Country	Modern	Developing	Not developed
Canada	86%	10%	4%
United Kingdom	82%	13%	5%
China	52%	43%	5%
Greece	46%	36%	18%
Russia	44%	46%	10%
Brazil	43%	49%	7%
Saudi Arabia	39%	40%	22%
Turkey	29%	54%	17%
Mexico	17%	56%	27%
Colombia	16%	56%	28%
El Salvador	8%	53%	39%

■ Modern   ☐ Developing   ■ Not developed

Perceptions of Travel Safety (I)

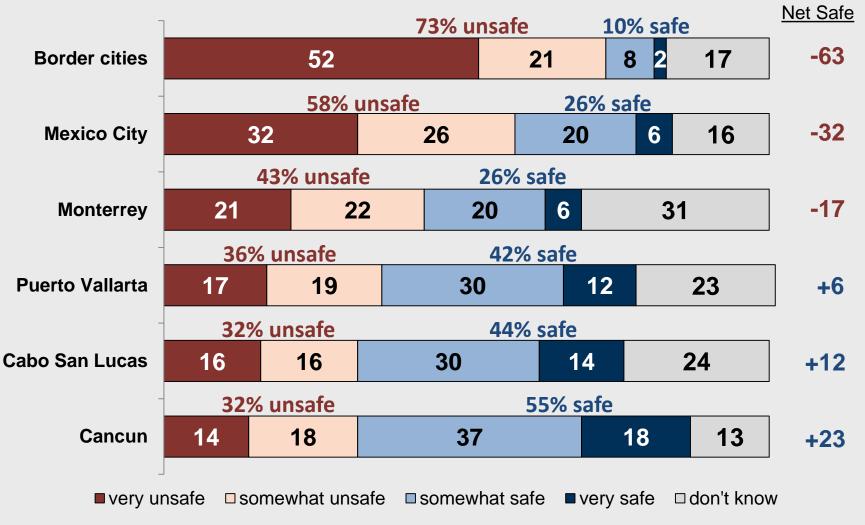## Mexico seen as more dangerous for travel than Colombia, El Salvador

Finally, thinking about those same countries one last time, how safe or unsafe would you feel about traveling to each one on vacation or for business? [Randomize]

Country	Very unsafe	Somewhat unsafe	Total
Mexico	43%	29%	**72%** *unsafe*
Colombia	38%	30%	**68%**
Saudi Arabia	37%	29%	**66%**
El Salvador	31%	35%	**66%**
Turkey	21%	28%	**49%**
China	16%	22%	**38%**
Russia	11%	27%	**38%**
Brazil	12%	21%	**33%**
Greece	12%	16%	**28%**
United Kingdom			**6%**
Canada			**4%**

■ Very unsafe   □ Somewhat unsafe

Perceptions of Travel Safety (II)

MX beach areas seen as much safer than border towns, big cities

How safe or unsafe would you feel about traveling to the following areas of Mexico on vacation or for business? [Randomize]

Net Safe

Area	73% unsafe		10% safe			Net Safe
Border cities	52	21	8	2	17	**-63**
Mexico City (58% unsafe / 26% safe)	32	26	20	6	16	**-32**
Monterrey (43% unsafe / 26% safe)	21	22	20	6	31	**-17**
Puerto Vallarta (36% unsafe / 42% safe)	17	19	30	12	23	**+6**
Cabo San Lucas (32% unsafe / 44% safe)	16	16	30	14	24	**+12**
Cancun (32% unsafe / 55% safe)	14	18	37	18	13	**+23**

■ very unsafe □ somewhat unsafe □ somewhat safe ■ very safe □ don't know

6

Reasons for Mexico Image Ratings

Drug violence is prevailing driver of Americans' views of Mexico

You indicated your overall view of Mexico is [ ]. Please briefly explain why you feel this way about Mexico

Reasons[1]	%[2]
Drugs/Cartels/Crime/Violence/Unsafe	**72%**
Corruption	**21%**
Don't know/Not familiar enough	**13%**
Illegal immigration/Border crossings	**7%**
Good place to visit/Things to see/Safe places	**7%**
Good people/Developing/Trying hard/Like it	**5%**
Been there/Know people from there	**4%**
Ally/Friend/Neighbor	**4%**
Poverty/Poor	**3%**
Depends on where you go/Some places safe	**3%**
Dirty/Pollution	**2%**
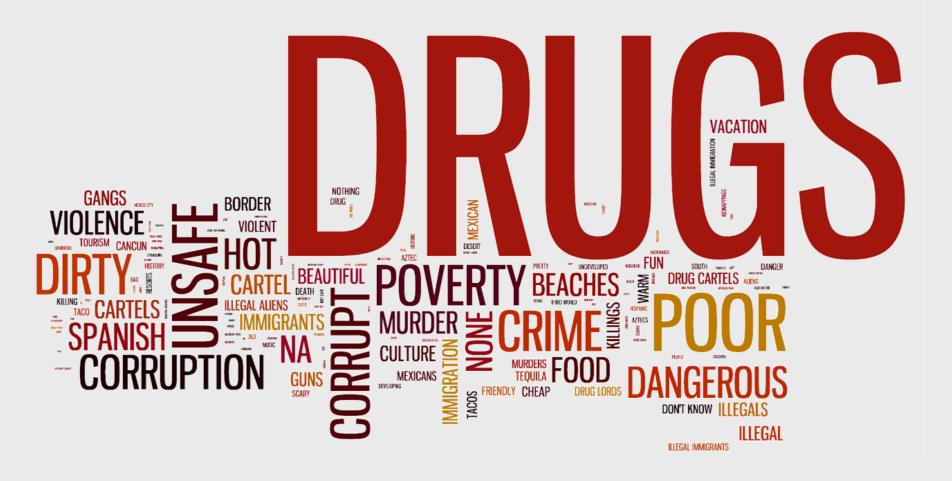
1 Open-end question – responses have been categorized
2 Numbers sum to more than 100% because many respondents mentioned multiple things

Mexico Word Associations
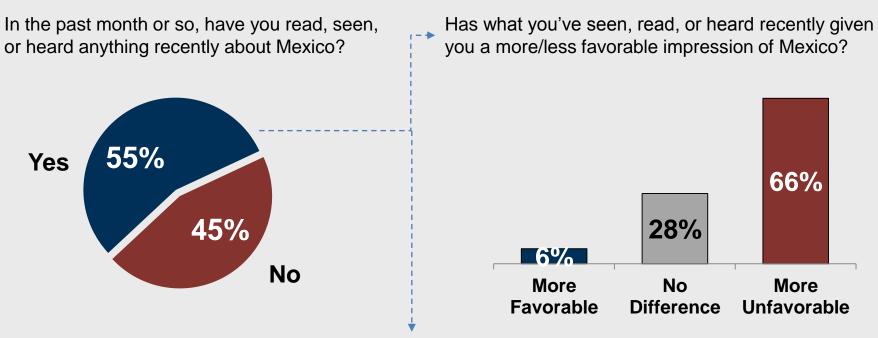
"Drug(s)" mentioned by 45% of respondents

Now, thinking about Mexico, what are three words that come to mind?

Information Flow

Bad news about drug violence, border issues dominates

In the past month or so, have you read, seen, or heard anything recently about Mexico?

Has what you've seen, read, or heard recently given you a more/less favorable impression of Mexico?

Yes 55%

45% **No**

66%

28%

6%

More Favorable

No Difference

More Unfavorable

In your own words, please describe what you've seen, read, or heard[1]
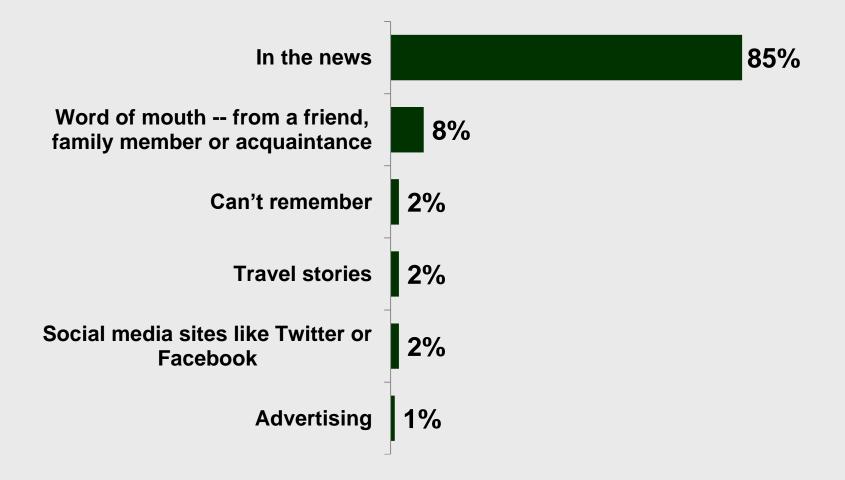
81% Drug problems/Cartels/Drug violence
42% Murder/Shooting/Beheadings
39% U.S. Border Patrol agent killed
14% Illegal immigration/Border crossings
6% Fast & Furious
8% U.S. tourist killed
4% Crime crackdown/Reform/Government fighting back

1 Open-end question – responses have been categorized – sum more than 100% because many respondents mentioned multiple things

Information Sources

Media reports are where people hear, learn about Mexico

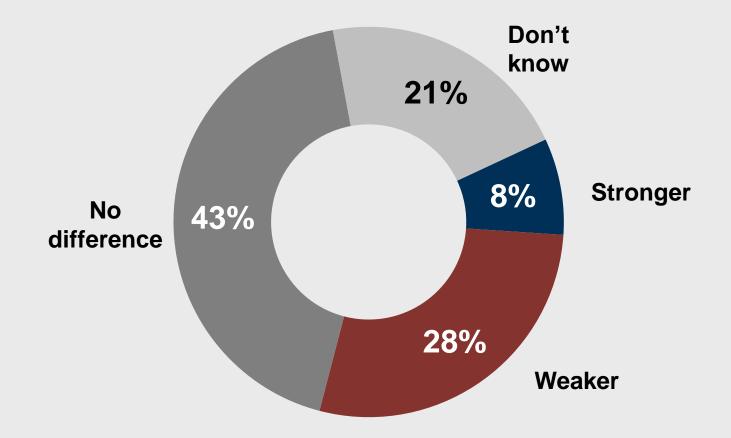And where did you see, read or hear this information?[1]

In the news	85%
Word of mouth -- from a friend, family member or acquaintance	8%
Can't remember	2%
Travel stories	2%
Social media sites like Twitter or Facebook	2%
Advertising	1%

1 Asked only of those who had had read/seen/heard something

U.S. Relationship with Mexico (I)

Most see it as unchanged or don't know enough
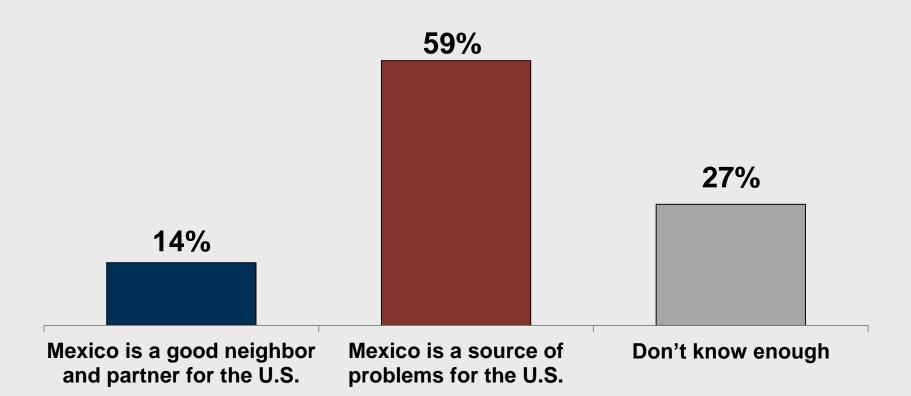
Do you think the U.S. relationship with Mexico has gotten stronger, has gotten weaker or has been mostly unchanged during the past four years?

U.S. Relationship with Mexico (II)

Large majority views Mexico more as a source of problems than as a good neighbor
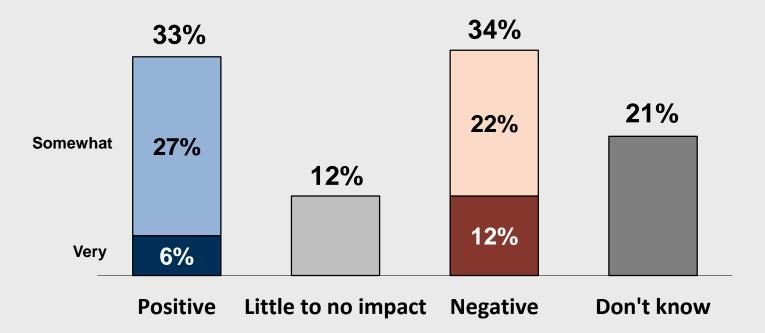
And which is closer to your view of Mexico's current relationship with the United States?

Mexico is a good neighbor and partner for the U.S. — 14%

Mexico is a source of problems for the U.S. — 59%

Don't know enough — 27%

U.S. Relationship with Mexico (III)

Views are mixed on impact of U.S.-Mexico trade relationship
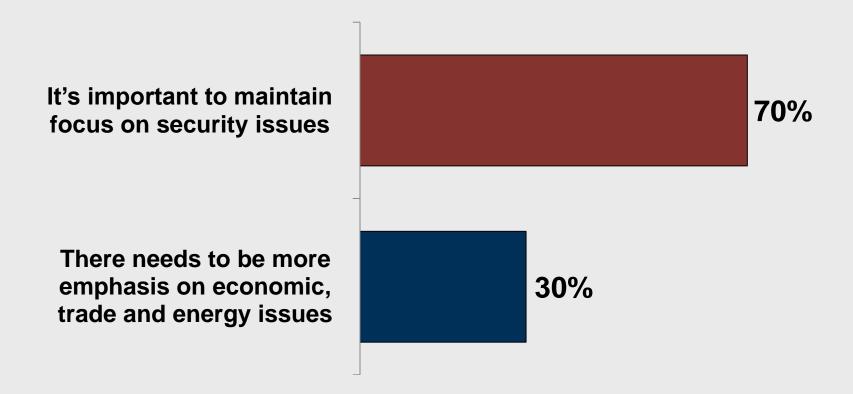
As you may know, Mexico is a major trading partner of the U.S. What kind of overall impact – if any – do you think this relationship has had <u>on the American economy</u>?

U.S. Relationship with Mexico (IV)

Large majority want bilateral relationship focused on security

In recent years, the relationship between the U.S. and Mexican governments has largely focused on security issues such as border control and drug trafficking. Thinking about the future of the U.S.-Mexico relationship, which of the following views is closer to your own?

It's important to maintain focus on security issues — **70%**

There needs to be more emphasis on economic, trade and energy issues — **30%**

Perceptions of Mexico

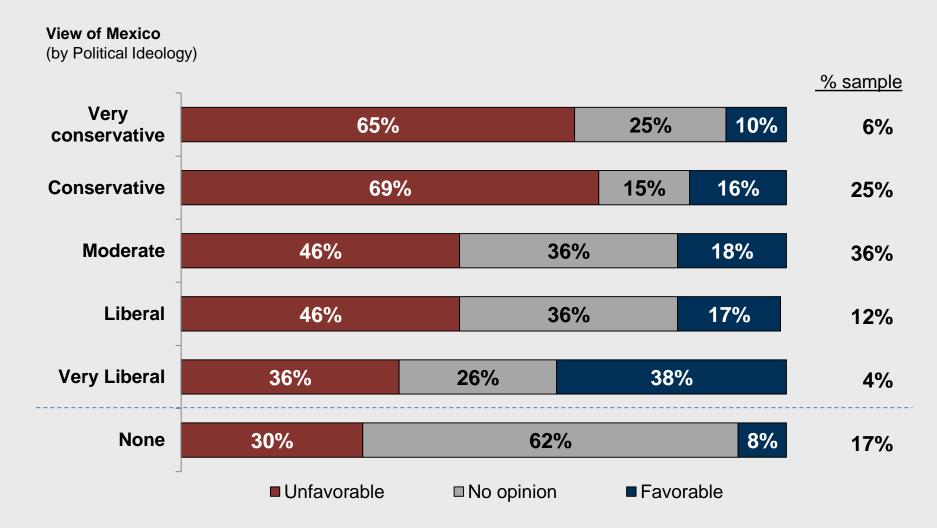## There is a lot of work to do – challenges and opportunities

Below is a list of statements about Mexico. Please indicate whether you agree or disagree with each statement[1]. [Randomize]

Statement	Agree	Disagree	No opinion
Mexico has a rich cultural heritage	77%	8%	14%
Products made in Mexico are safer than products made in China	38%	21%	40%
Mexico has a large, growing middle class	30%	39%	31%
Mexico is a good place to do business	32%	42%	26%
Mexico is a dangerous and unstable country	65%	23%	12%
Mexico is winning the fight against the drug cartels and traffickers	10%	72%	17%

1 Respondents were able to strong or somewhat agree/disagree – results have been collapsed

Key Demographic Differences (I)

Ideology is most significant driver of respondents' views of Mexico…

View of Mexico
(by Political Ideology)

% sample

Ideology	Unfavorable	No opinion	Favorable	% sample
Very conservative	65%	25%	10%	6%
Conservative	69%	15%	16%	25%
Moderate	46%	36%	18%	36%
Liberal	46%	36%	17%	12%
Very Liberal	36%	26%	38%	4%
None	30%	62%	8%	17%

■ Unfavorable   ■ No opinion   ■ Favorable

Key Demographic Differences (II)

...and even more so, of attitudes about U.S-Mexico relationship

Security v. Economy in U.S.-Mexico Relations
(by Political Ideology)

	Security	Economic/trade
Very conservative	97%	3%
Conservative	87%	13%
Moderate	67%	34%
Liberal	51%	49%
Very Liberal	49%	51%

Legend: ■ Security ■ Economic/trade

Good Neighbor v. Source of Problems
(by Political Ideology)

	Good neighbor	Problem	Don't know
Very conservative	13%	76%	11%
Conservative	8%	79%	13%
Moderate	15%	60%	26%
Liberal	22%	55%	23%
Very Liberal	41%	36%	24%

Legend: ■ Good neighbor ■ Problem ■ Don't know

About Vianovo and GSD&M

Vianovo is leading strategy consultancy that advises companies and causes on high-stakes brand, policy and crisis issues. Our team has shaped strategies for U.S. Presidents and corporate CEOs and helped direct some of the most highly-charged battles of our time. Current and past clients include AT&T, NASA, the Gates Foundation, Airbus, Western Union, and Oxxo.

GSD&M is one of the world's top advertising agencies. Longtime clients include Southwest Airlines, the PGA Tour, AT&T, and the U.S. Air Force and recent wins include Goodyear, Walgreen's, Pacifico, and Novamex. GSD&M is known for groundbreaking work, including helping reposition BMW with its global Joy campaign and creating the famed "Don't Mess With Texas" anti-littering campaign.

Appendix

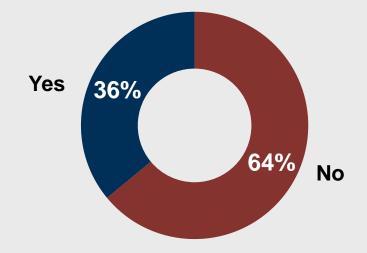TRAVEL & RELATIONSHIPS ANALYSIS
OUR RATINGS VS. GALLUP

Travel and Relationships

A surprising number of Americans say they have traveled to or know someone from Mexico

Which best describes your
travel to Mexico?

Travel Frequency	%
I've been there once	15%
I've been there a few times	23%
I've been there many times	10%
I travel there frequently	1%
I've never been there	52%

49%

Do you have any friends, family or colleagues
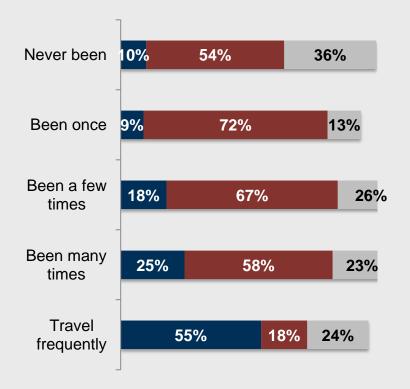in the U.S. that were born in Mexico?

Yes **36%**

64% No

Demographic Differences (III)

Travel, age also appear to have some effect on attitudes
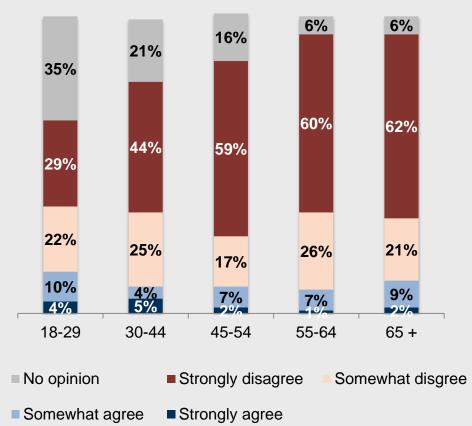
Good Neighbor v. Source of Problems
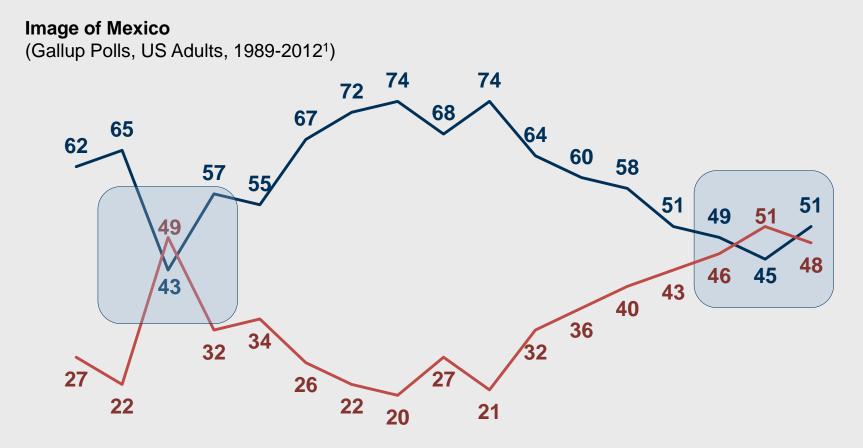(by Political Ideology)

	Good neighbor	Source of Problems	Don't know
Never been	10%	54%	36%
Been once	9%	72%	13%
Been a few times	18%	67%	26%
Been many times	25%	58%	23%
Travel frequently	55%	18%	24%

■ Good neighbor ■ Source of Problems ■ Don't know

Mexico Is Winning the Drug War
(by Age)

	18-29	30-44	45-54	55-64	65 +
No opinion	35%	21%	16%	6%	6%
Strongly disagree	29%	44%	59%	60%	62%
Somewhat disagree	22%	25%	17%	26%	21%
Somewhat agree	10%	4%	7%	7%	9%
Strongly agree	4%	5%	2%	1%	2%

■ No opinion ■ Strongly disagree ■ Somewhat disgree ■ Somewhat agree ■ Strongly agree

Mexico Image in U.S. – History

Gallup Poll shows significant decline during past six years
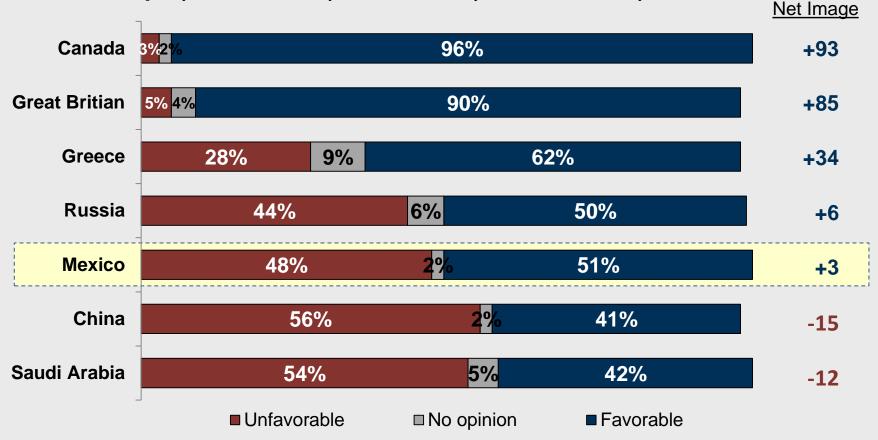
Image of Mexico
(Gallup Polls, US Adults, 1989-2012[1])

—Favorable   **—Unfavorable**
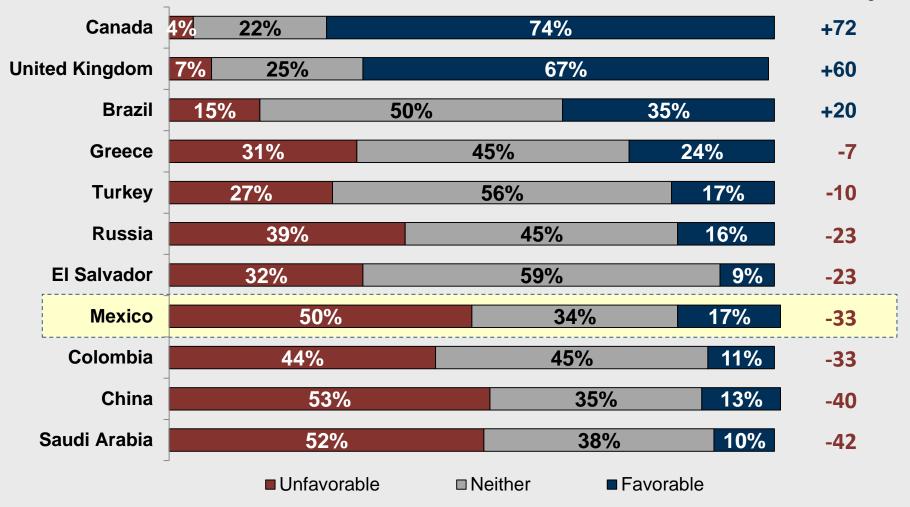
Our Country Image Ratings[1]

Given what you know about the following countries, what is your opinion of each? [Randomize]

Net Image

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