

Mexico's Brand in the U.S.

NATIONAL SURVEY RESULTS – KEY FINDINGS

November 2012

GSD&M

vianovo

Austin | Dallas | Washington | Mexico City

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 YouGov¹ (MOE \pm 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

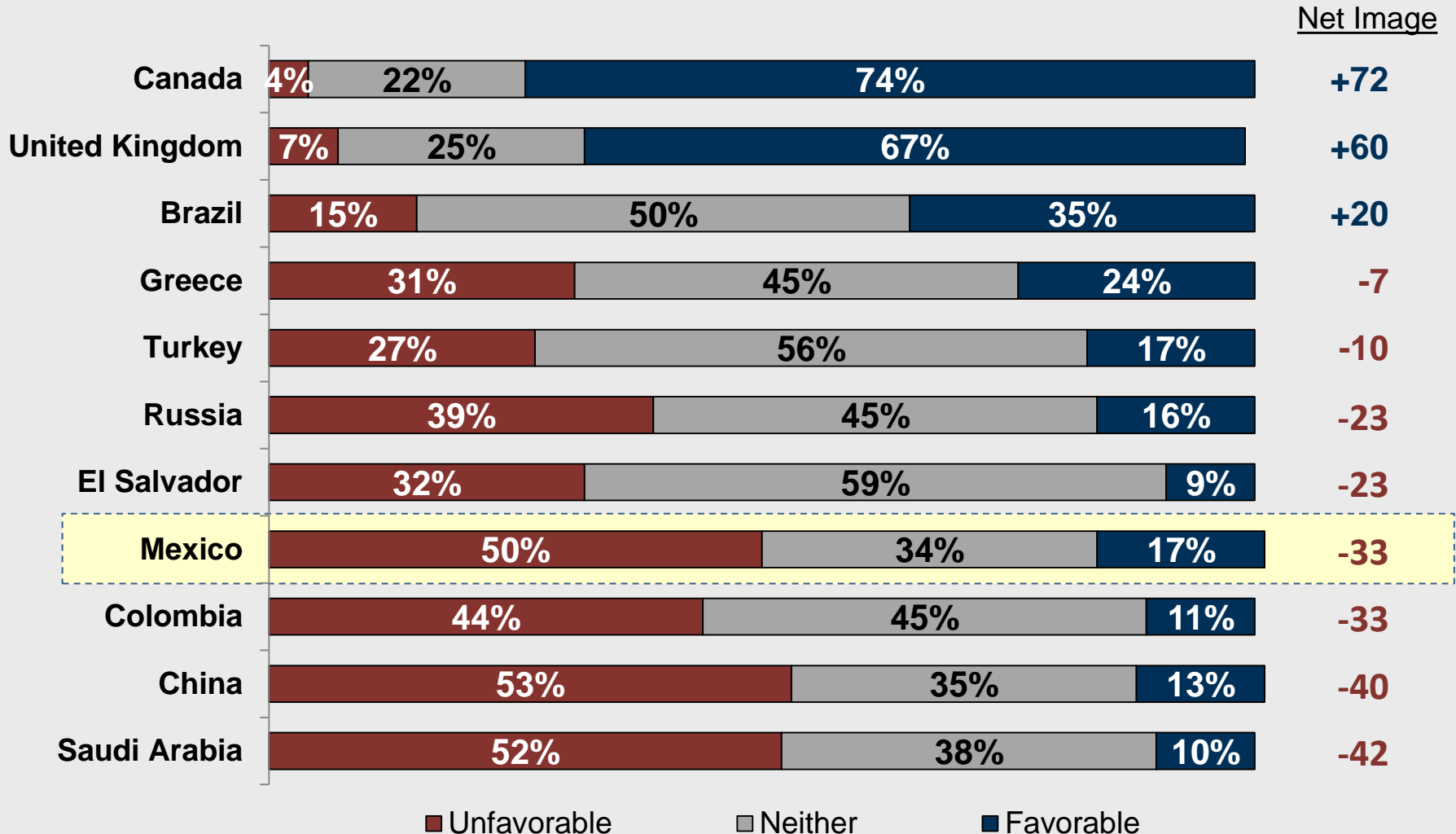
We investigated four key topics

- 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 Ratings¹

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]

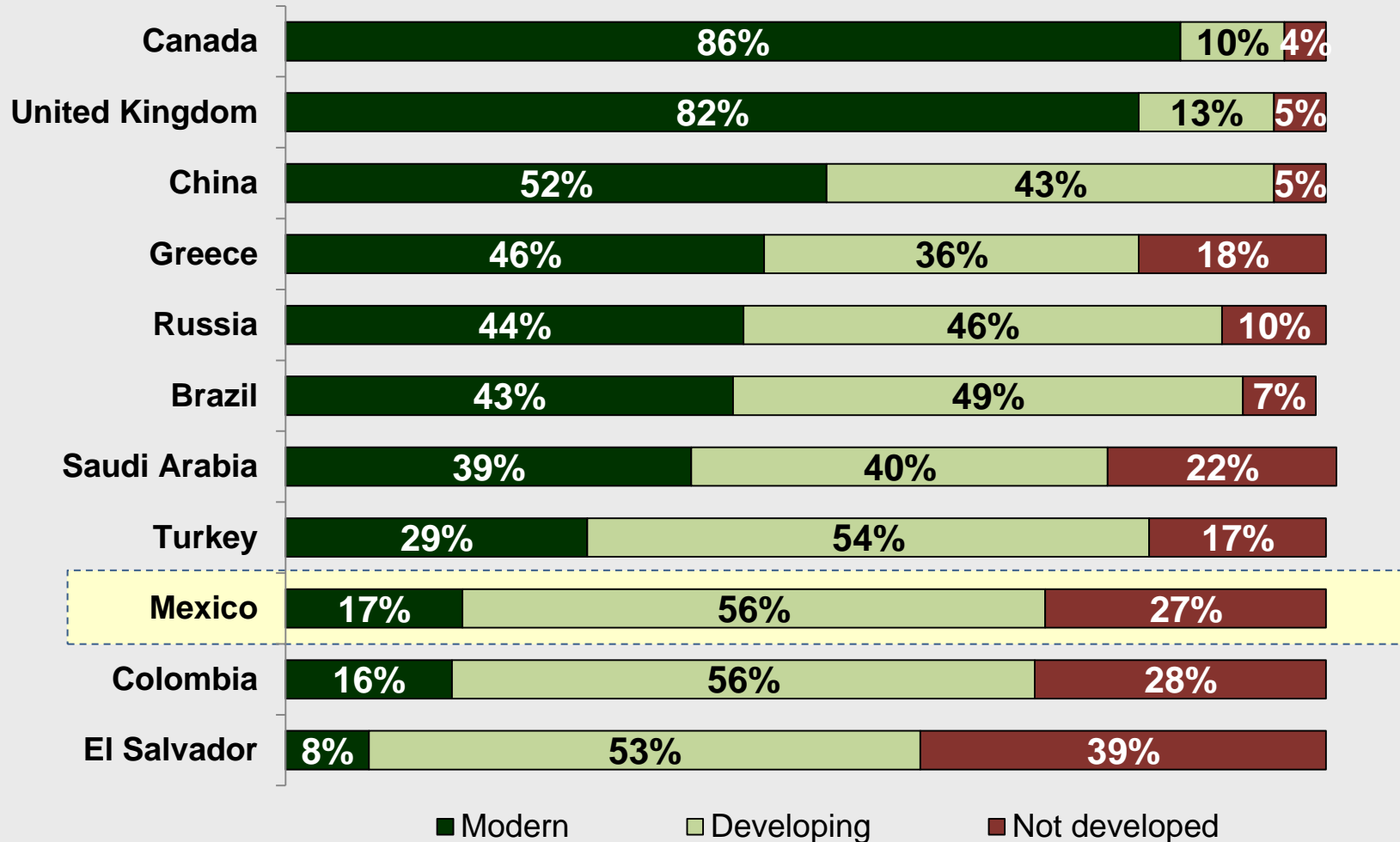


¹ Unlike Gallup, our image question provides respondents a neutral midpoint (which signifies don't know, no opinion, in middle) – results suggest many who choose “favorable” in Gallup are actually neutral (and lean positive on a forced choice)

Views of Country Economies

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

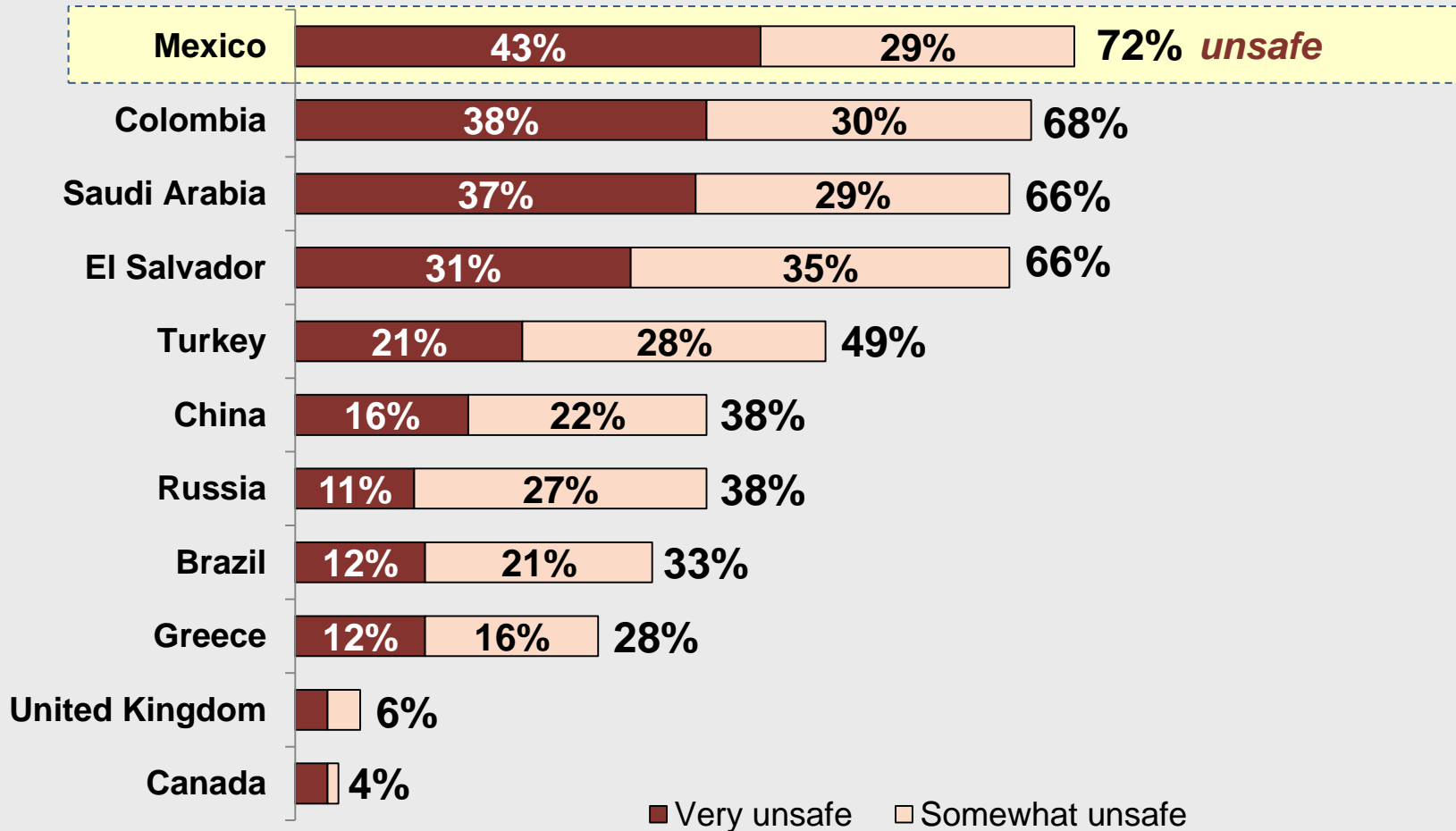
Again, thinking about those same countries, based on what you know, would you describe each of their economies as modern, developing or not developed? [Randomize]



Perceptions of Travel Safety (I)

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

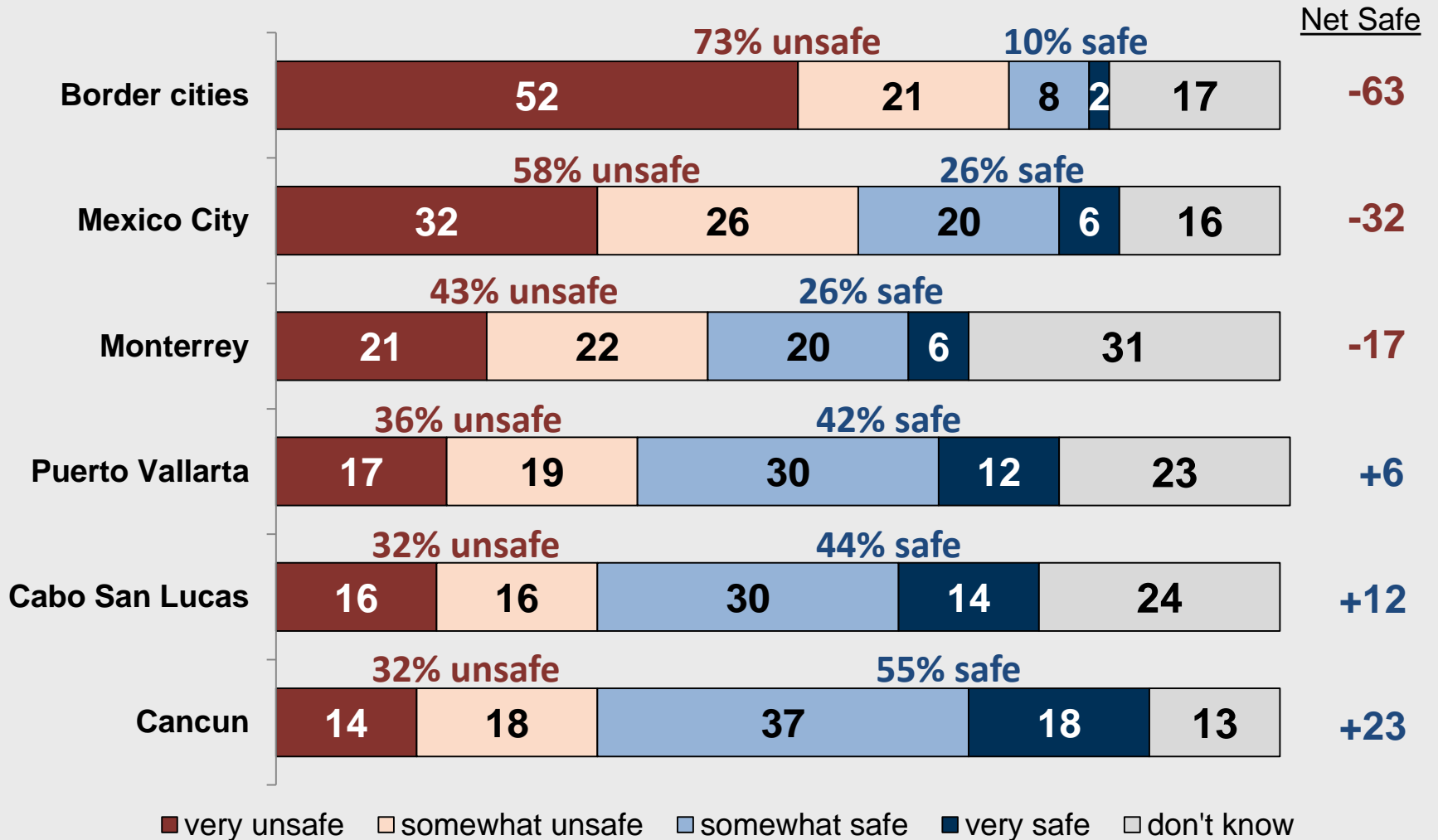
Finally, thinking about those same countries one last time, how safe or unsafe would you feel about traveling to each one on vacation or for business? [Randomize]



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]



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%

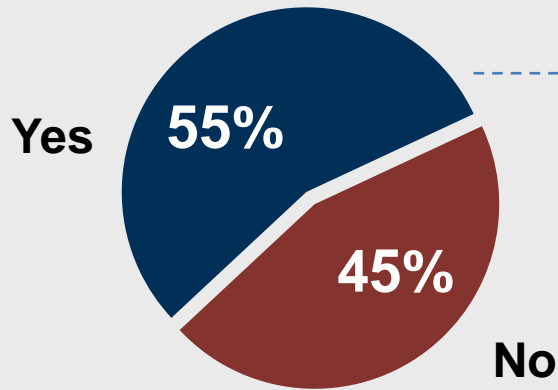
1 Open-end question – responses have been categorized

2 Numbers sum to more than 100% because many respondents mentioned multiple things

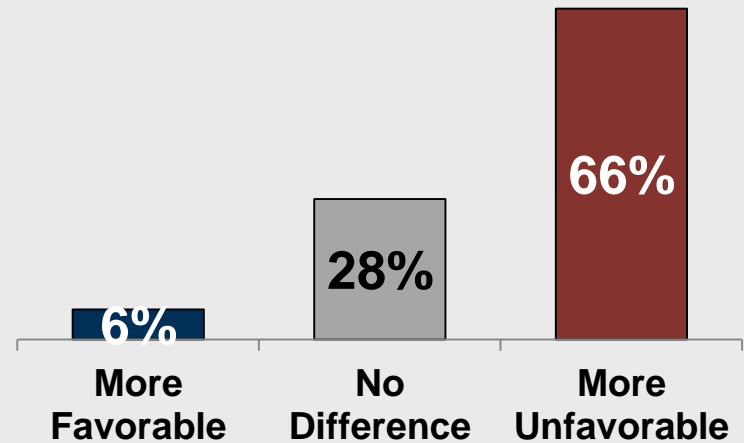
Information Flow

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?



In your own words, please describe what you've seen, read, or heard¹

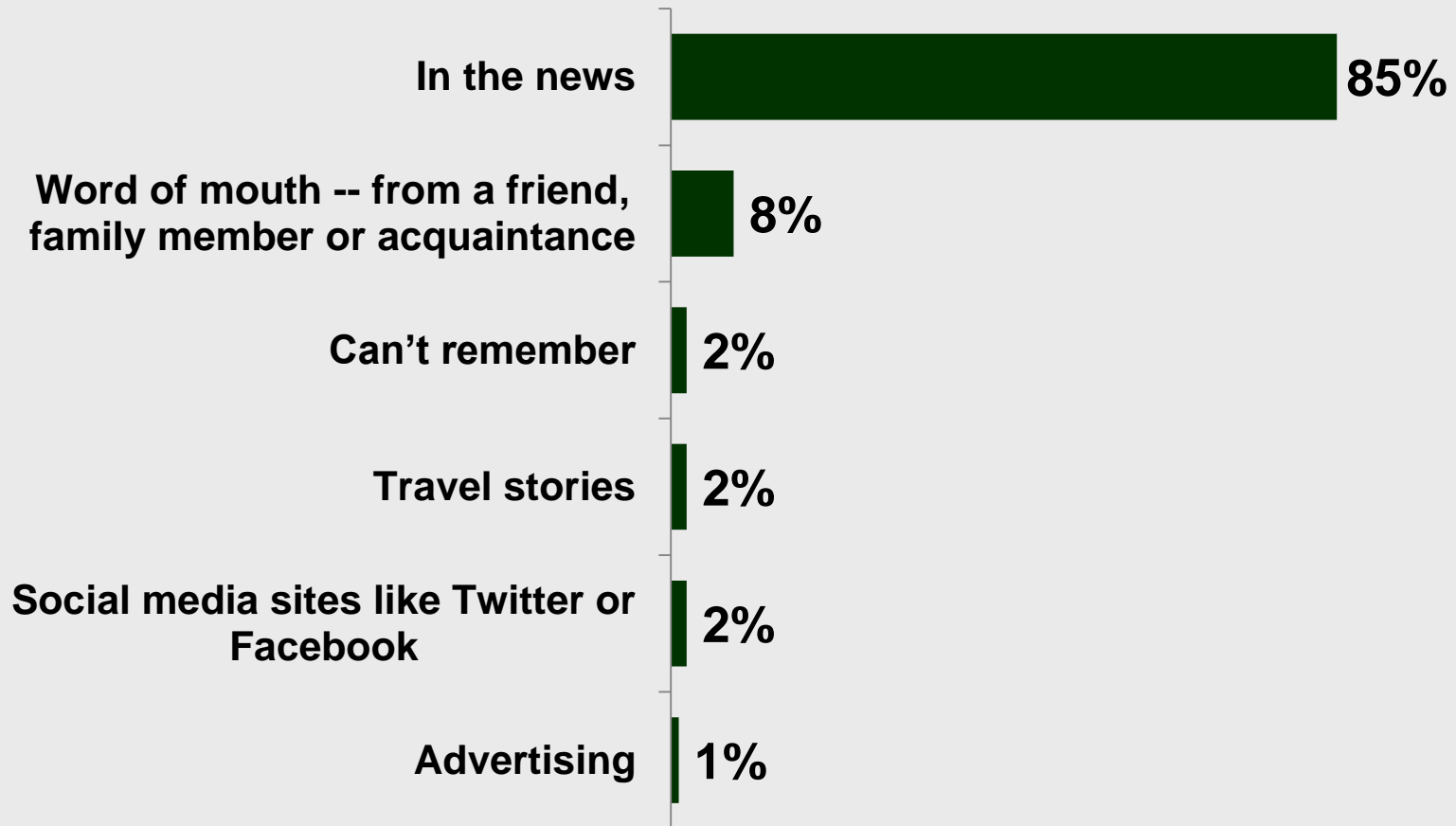
- 81%** Drug problems/Cartels/Drug violence
- 42%** Murder/Shooting/Beheadings
- 39%** U.S. Border Patrol agent killed
- 14%** Illegal immigration/Border crossings
- 6%** Fast & Furious
- 8%** U.S. tourist killed
- 4%** Crime crackdown/Reform/Government fighting back

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

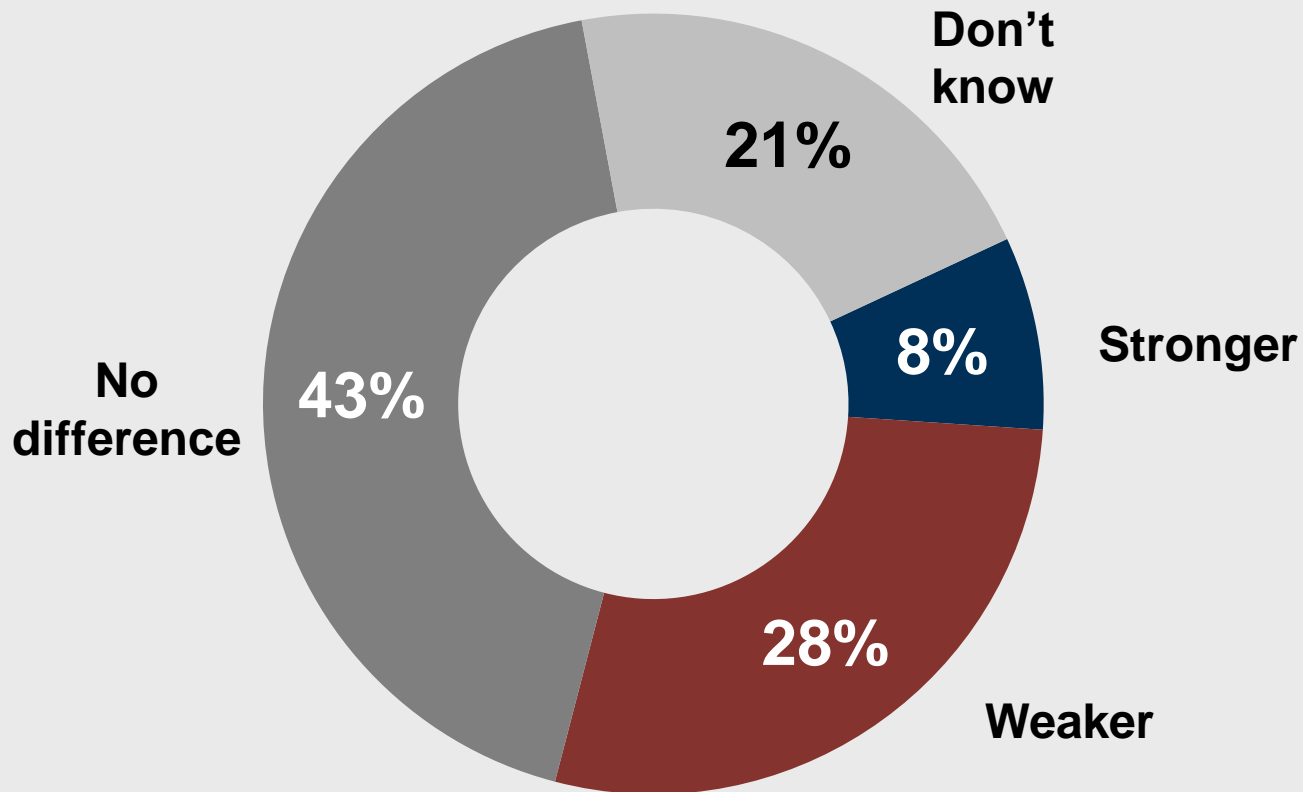


¹ Asked only of those who had had read/seen/heard something

U.S. Relationship with Mexico (I)

Most see it as unchanged or don't know enough

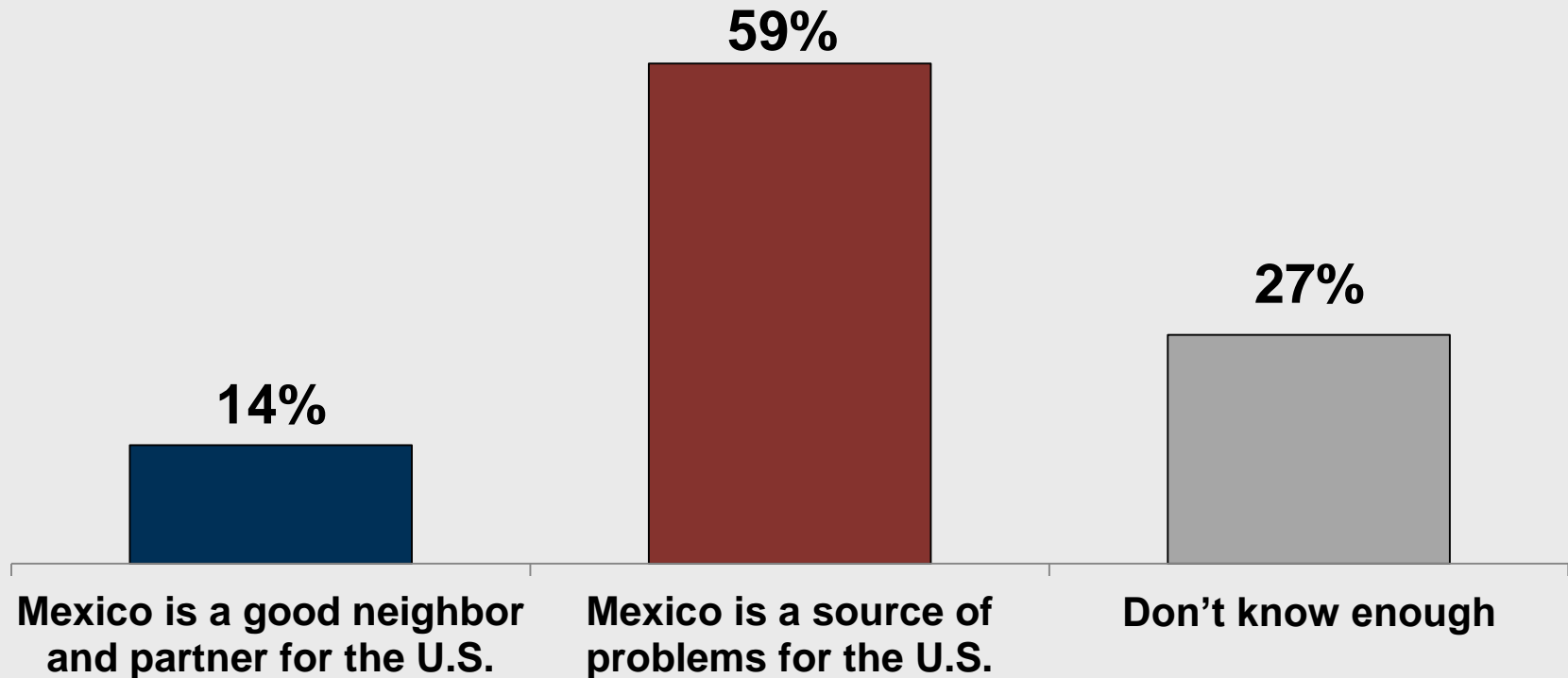
Do you think the U.S. relationship with Mexico has gotten stronger, has gotten weaker or has been mostly unchanged during the past four years?



U.S. Relationship with Mexico (II)

Large majority views Mexico more as a source of problems than as a good neighbor

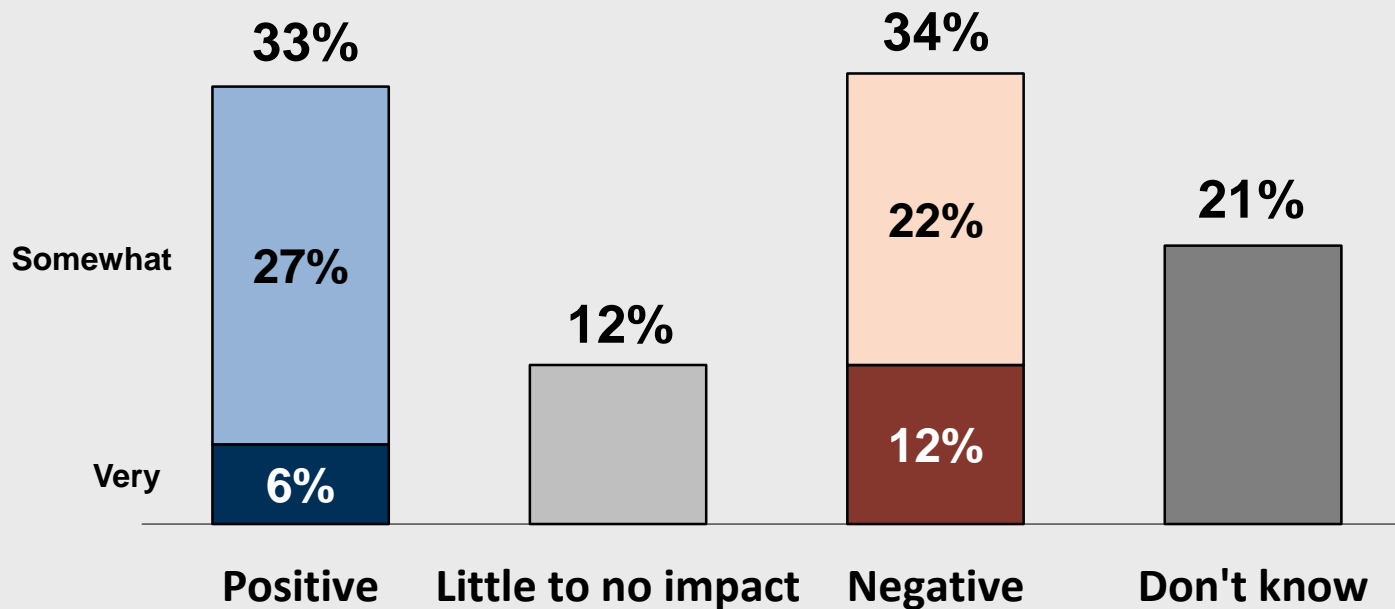
And which is closer to your view of Mexico's current relationship with the United States?



U.S. Relationship with Mexico (III)

Views are mixed on impact of U.S.-Mexico trade relationship

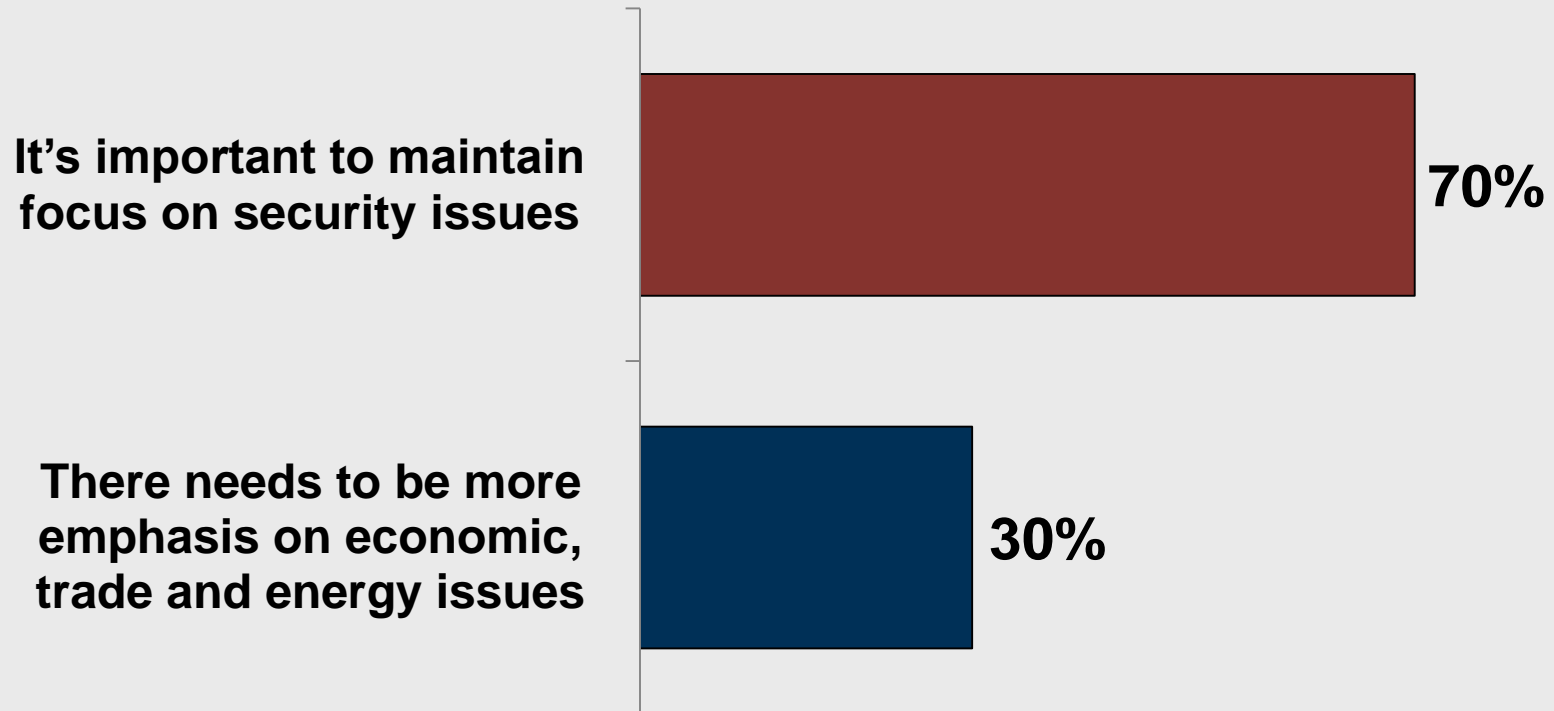
As you may know, Mexico is a major trading partner of the U.S. What kind of overall impact – if any – do you think this relationship has had on the American economy?



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?



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 statement¹. [Randomize]

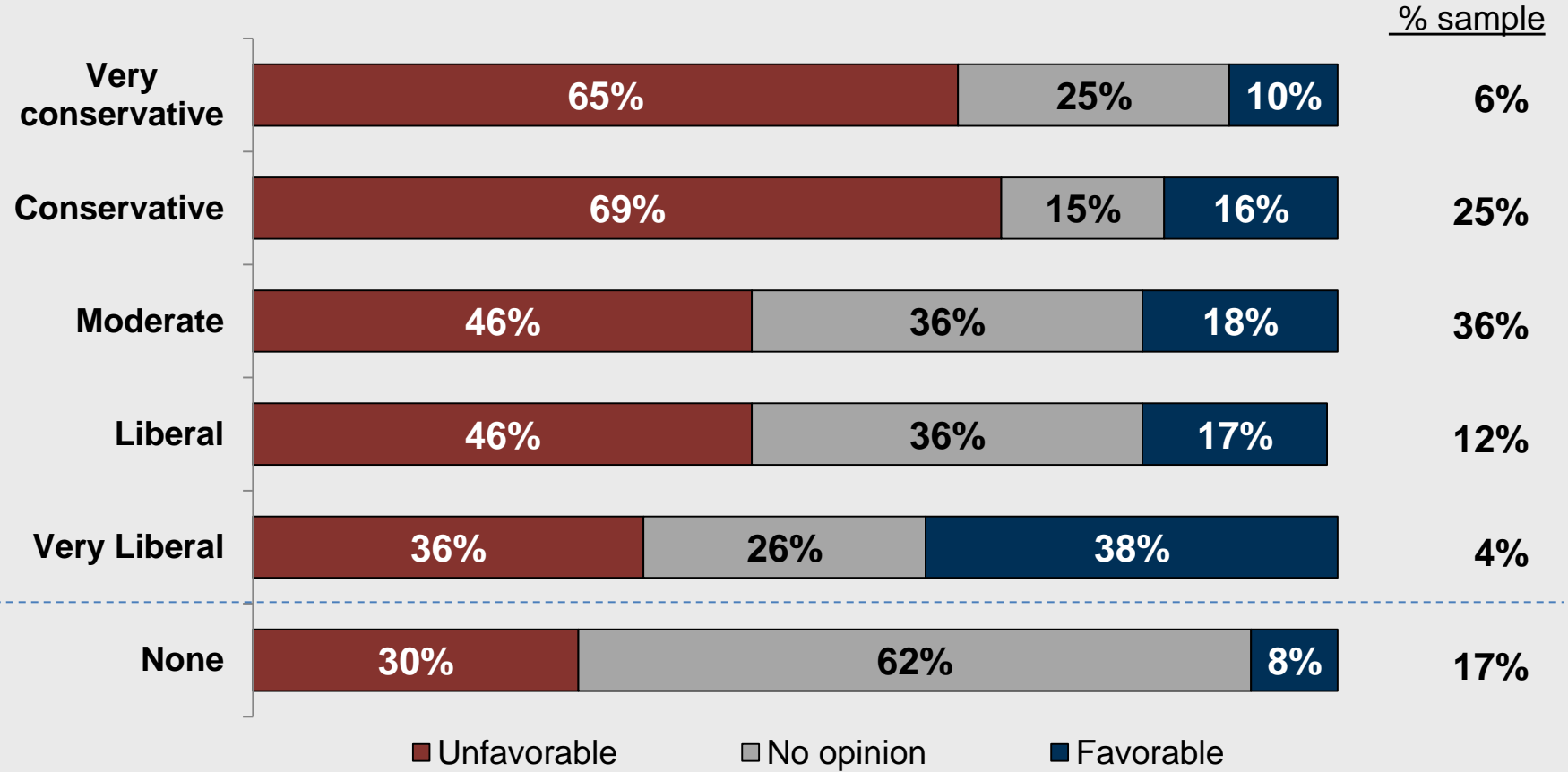
Statement	Agree	Disagree	No opinion
Mexico has a rich cultural heritage	77%	8%	14%
Products made in Mexico are safer than products made in China	38%	21%	40%
Mexico has a large, growing middle class	30%	39%	31%
Mexico is a good place to do business	32%	42%	26%
Mexico is a dangerous and unstable country	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...

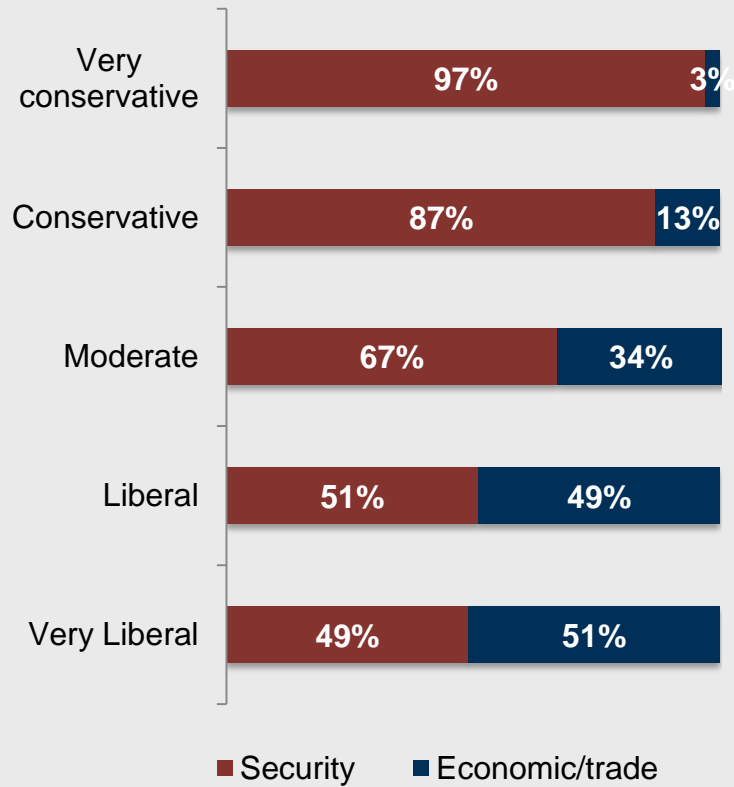
View of Mexico
(by Political Ideology)



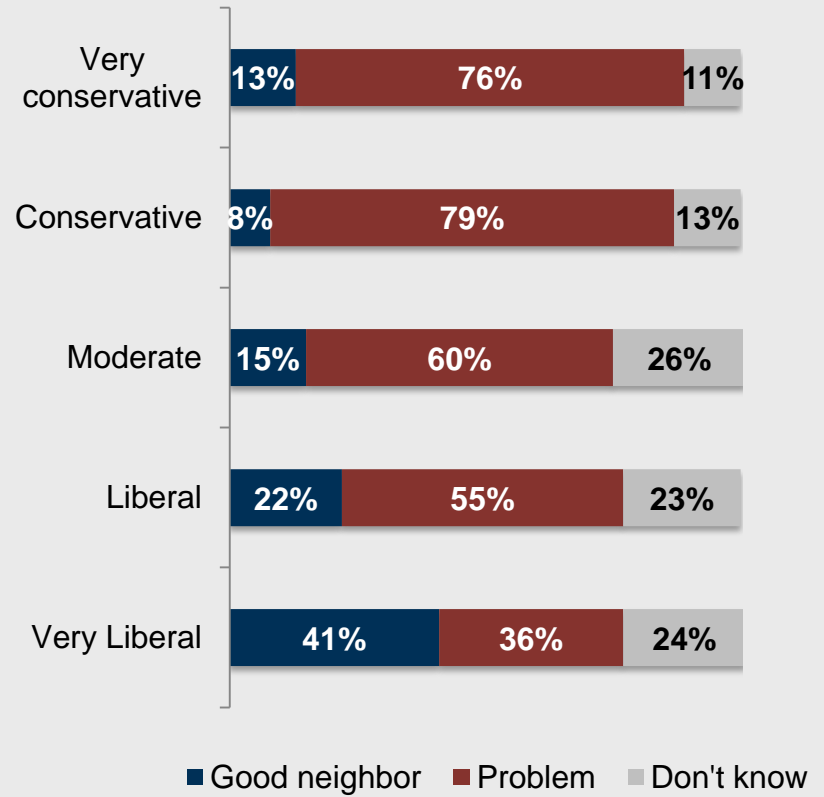
Key Demographic Differences (II)

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

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



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



About Vianovo and GSD&M

The logo for Vianovo, featuring the word "vianovo" in a white, lowercase, sans-serif font on a dark blue rectangular background.

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.

The logo for GSD&M, featuring the letters "GSD&M" in a white, uppercase, sans-serif font on a red rectangular background.

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

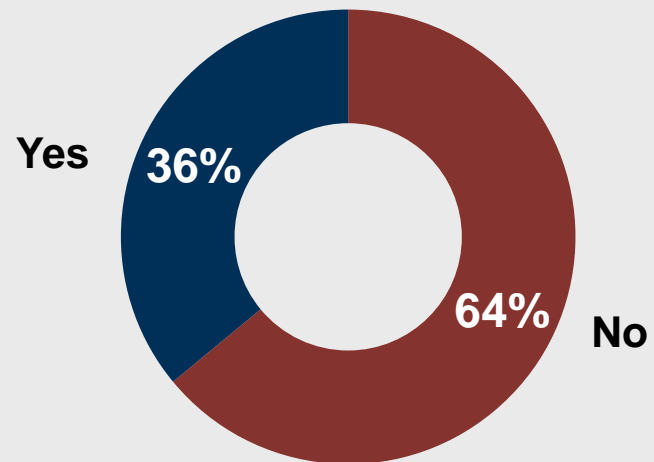
Travel and Relationships

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

Which best describes your travel to Mexico?

Travel Frequency		%
49%	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%

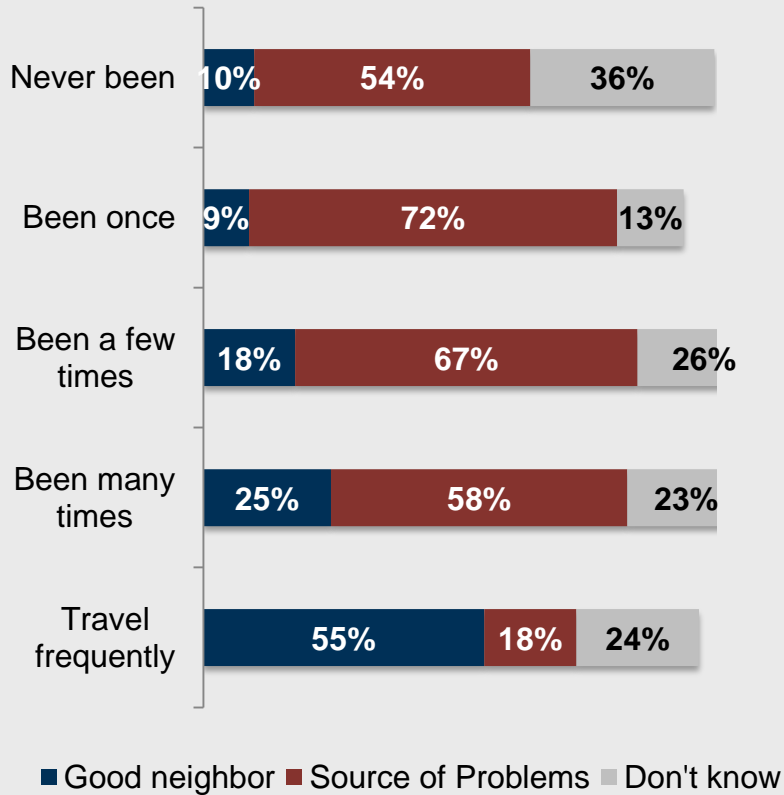
Do you have any friends, family or colleagues in the U.S. that were born in Mexico?



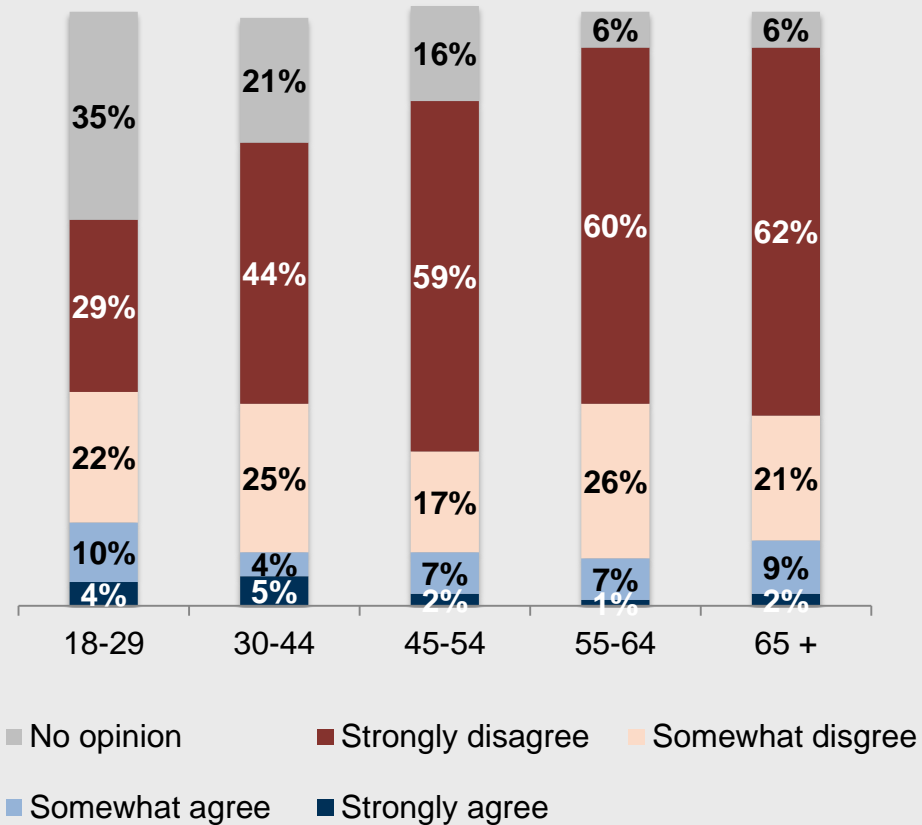
Demographic Differences (III)

Travel, age also appear to have some effect on attitudes

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



Mexico Is Winning the Drug War
(by Age)

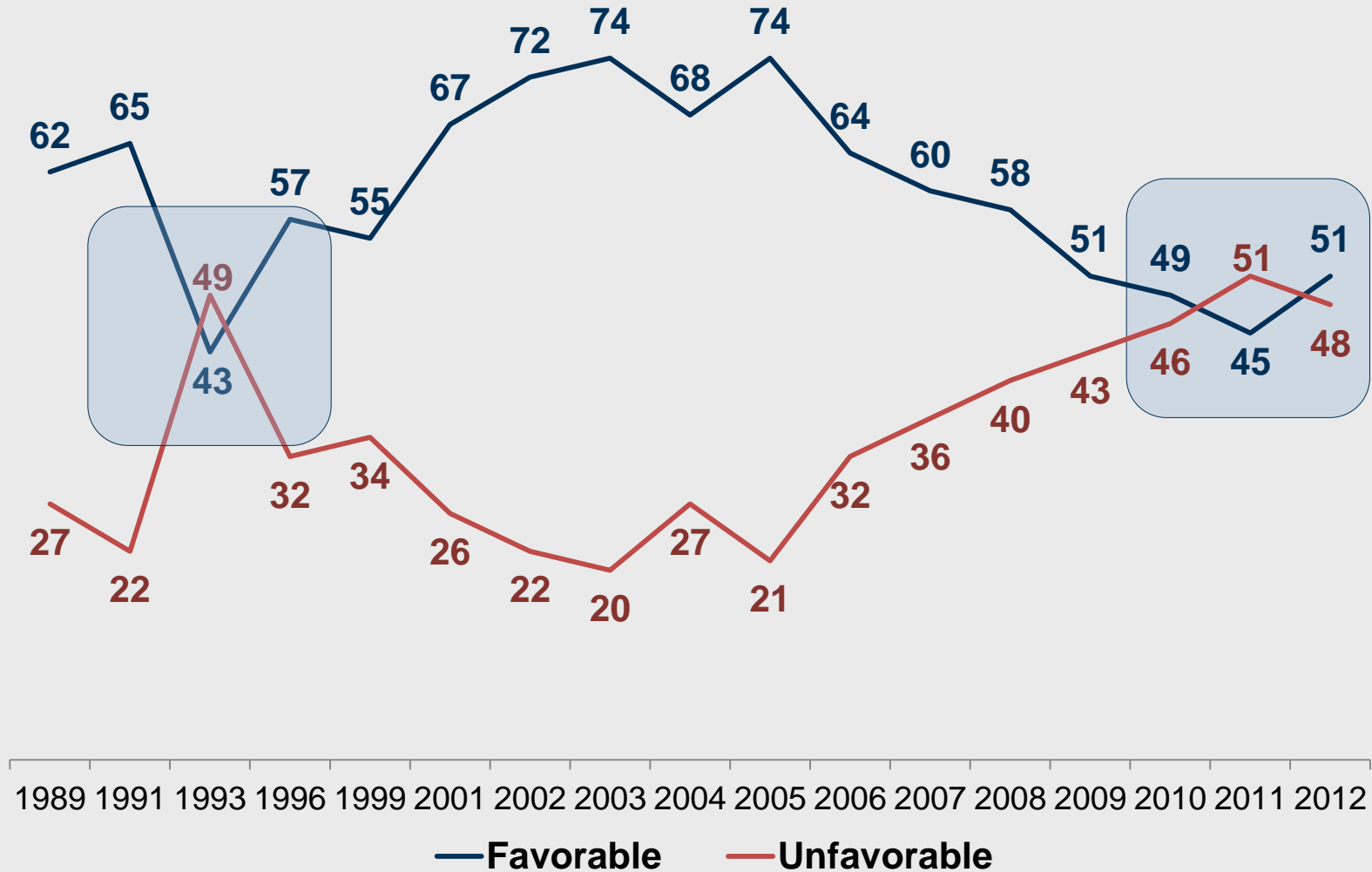


Mexico Image in U.S. – History

Gallup Poll shows significant decline during past six years

Image of Mexico

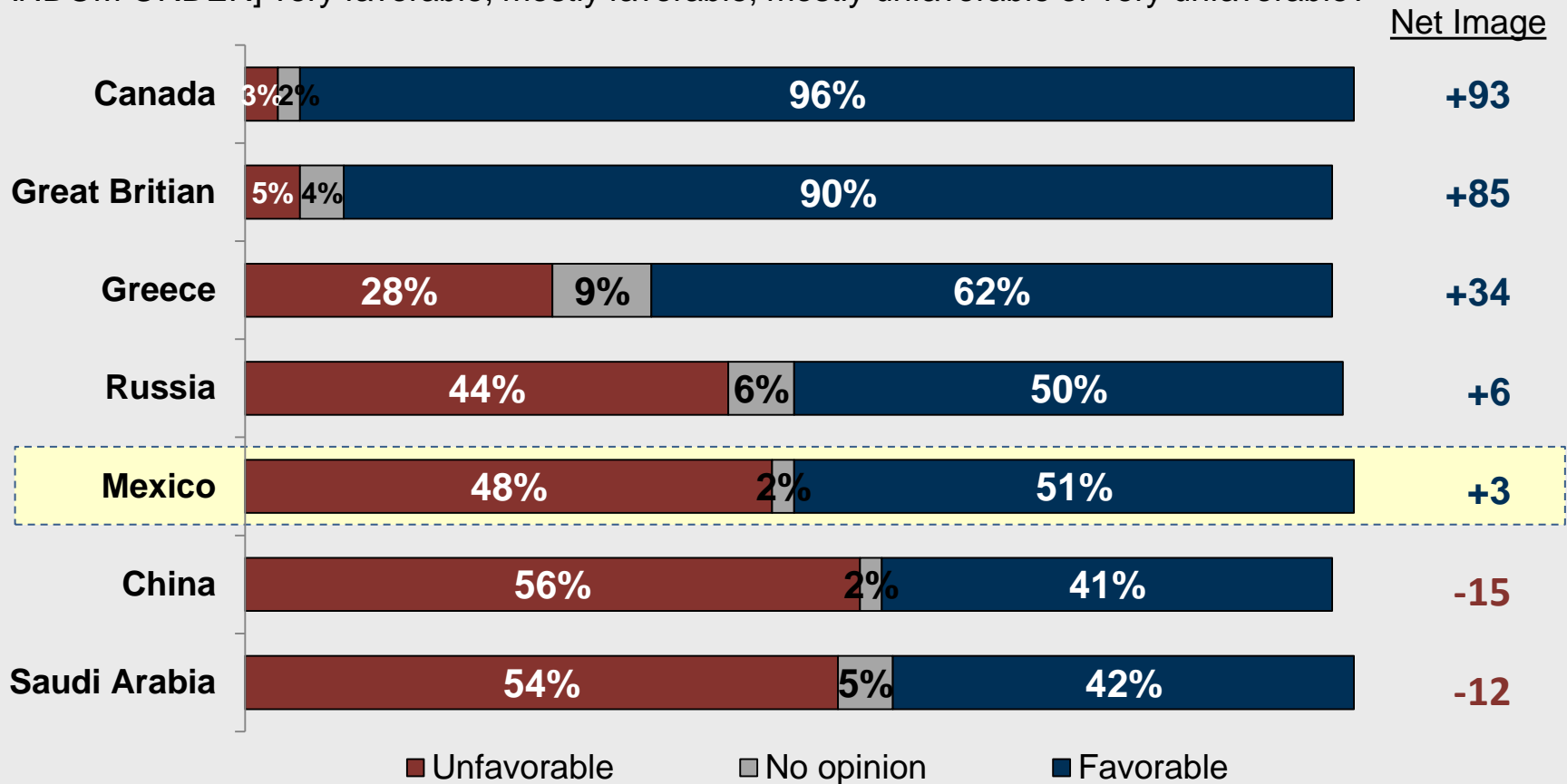
(Gallup Polls, US Adults, 1989-2012¹)



Gallup 2012 Country Image Ratings

For countries measured in our survey

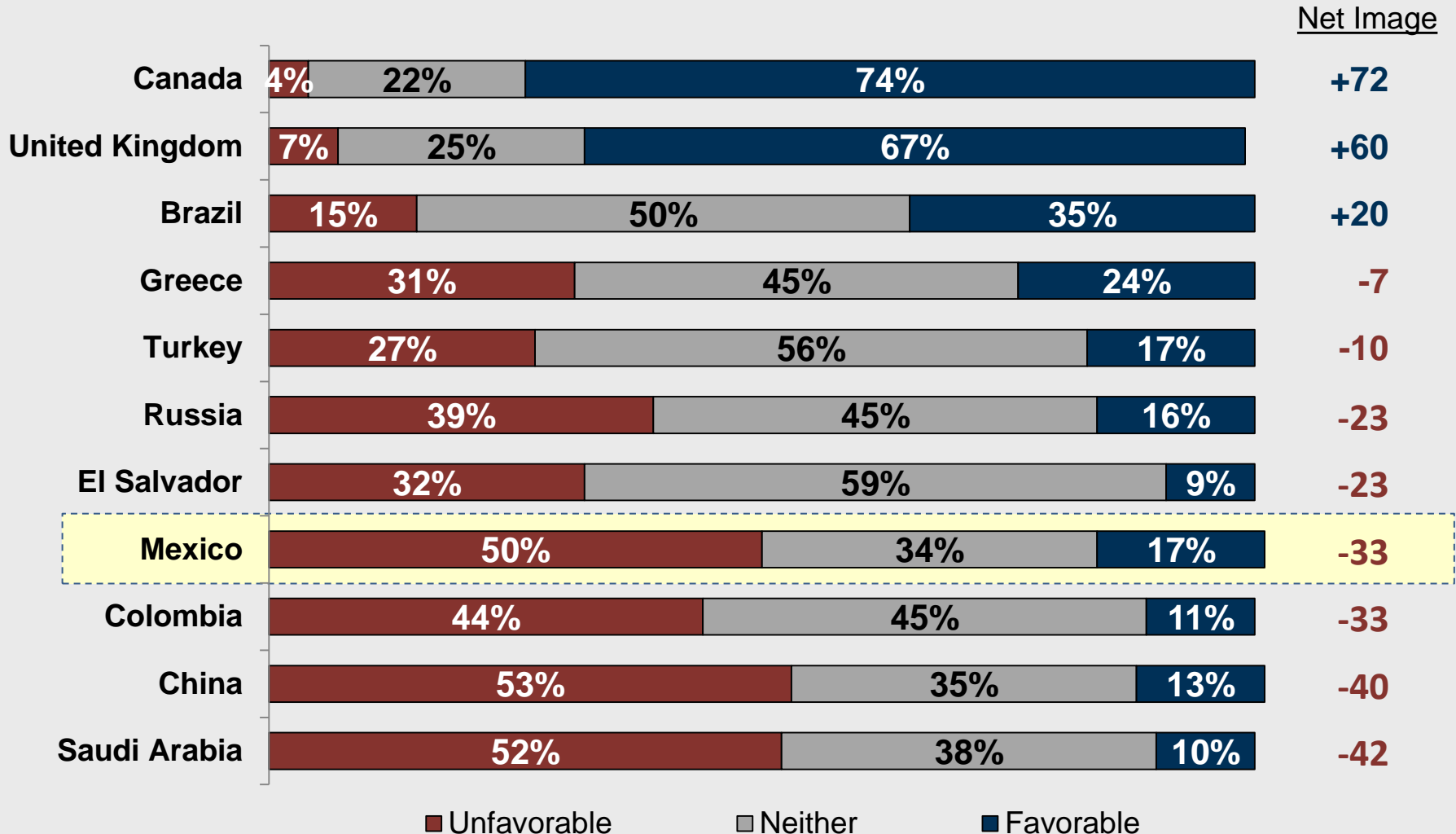
Next, I'd like your overall opinion of some foreign countries. First, is your overall opinion of [RANDOM ORDER] very favorable, mostly favorable, mostly unfavorable or very unfavorable?



Note: Gallup does not provide a “neither” option – this pushes respondents into either favorable or unfavorable categories

Our Country Image Ratings¹

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



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