

# Mexico's Brand in the U.S.

NATIONAL SURVEY RESULTS

June 2016

# 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 June 3-7, 2016**

**1,000 adults (18+) were interviewed online via YouGov<sup>1</sup> (MOE  $\pm$ 3.1%)**

**We conducted a similar survey in October 2012, and trends are provided where relevant**

<sup>1</sup> YouGov is one of the world's premiere online research firms and operates an online panel of 1.8 million U.S respondents; data has been weighted to U.S. Census estimates for key demographics

# Survey Roadmap

We investigated five topics

1

## **Overall image and associations**

overall, economy, security, associations

2

## **Information flow**

how much, what, impact

3

## **Specific knowledge and perceptions**

economy, government, culture, security

4

## **U.S-Mexico relationship**

past four years, view of, trade impact, NAFTA, future focus

5

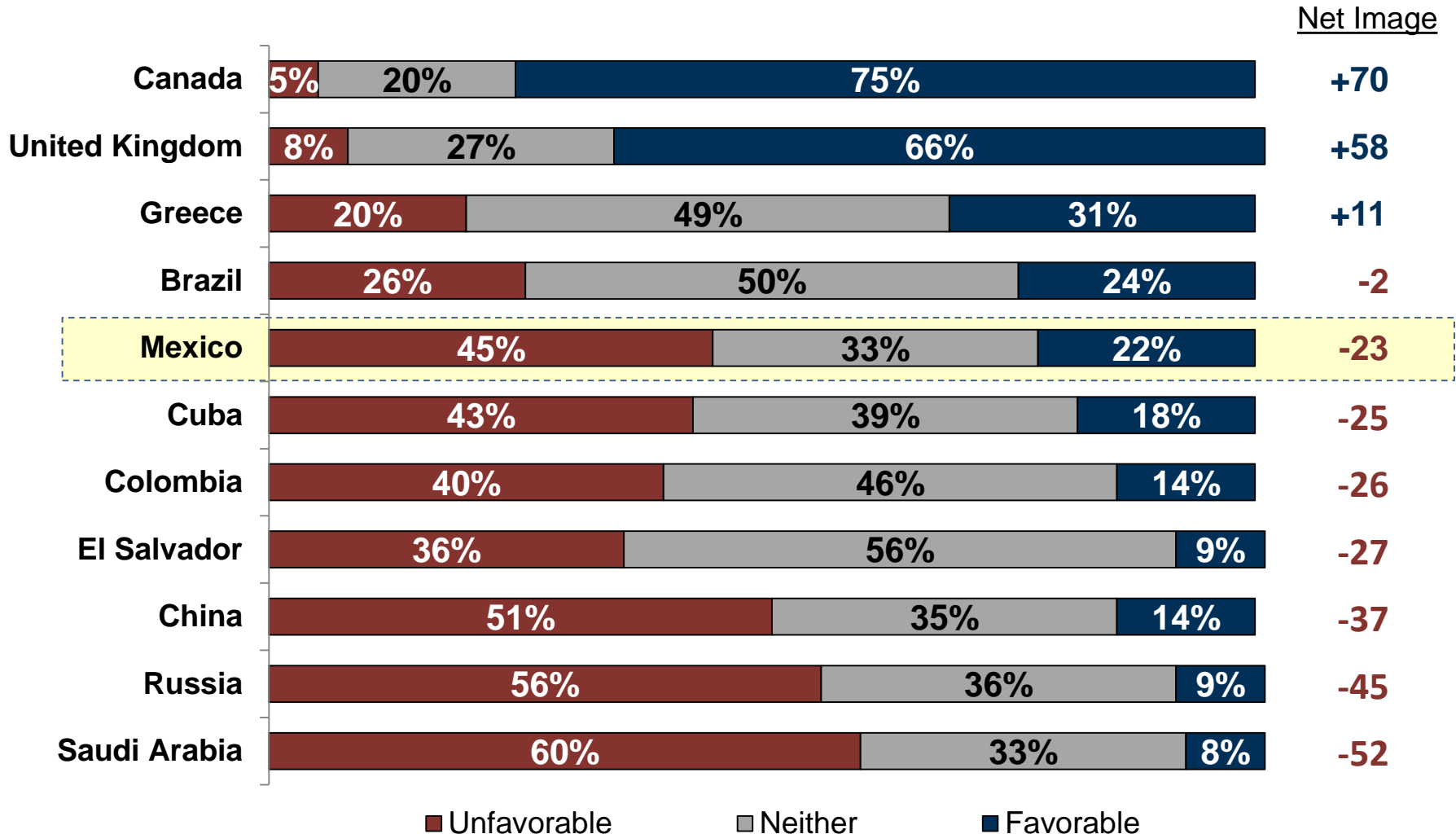
## **Political issues**

Immigration, border wall, presidential impact

# Country Image Ratings<sup>1</sup>

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

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

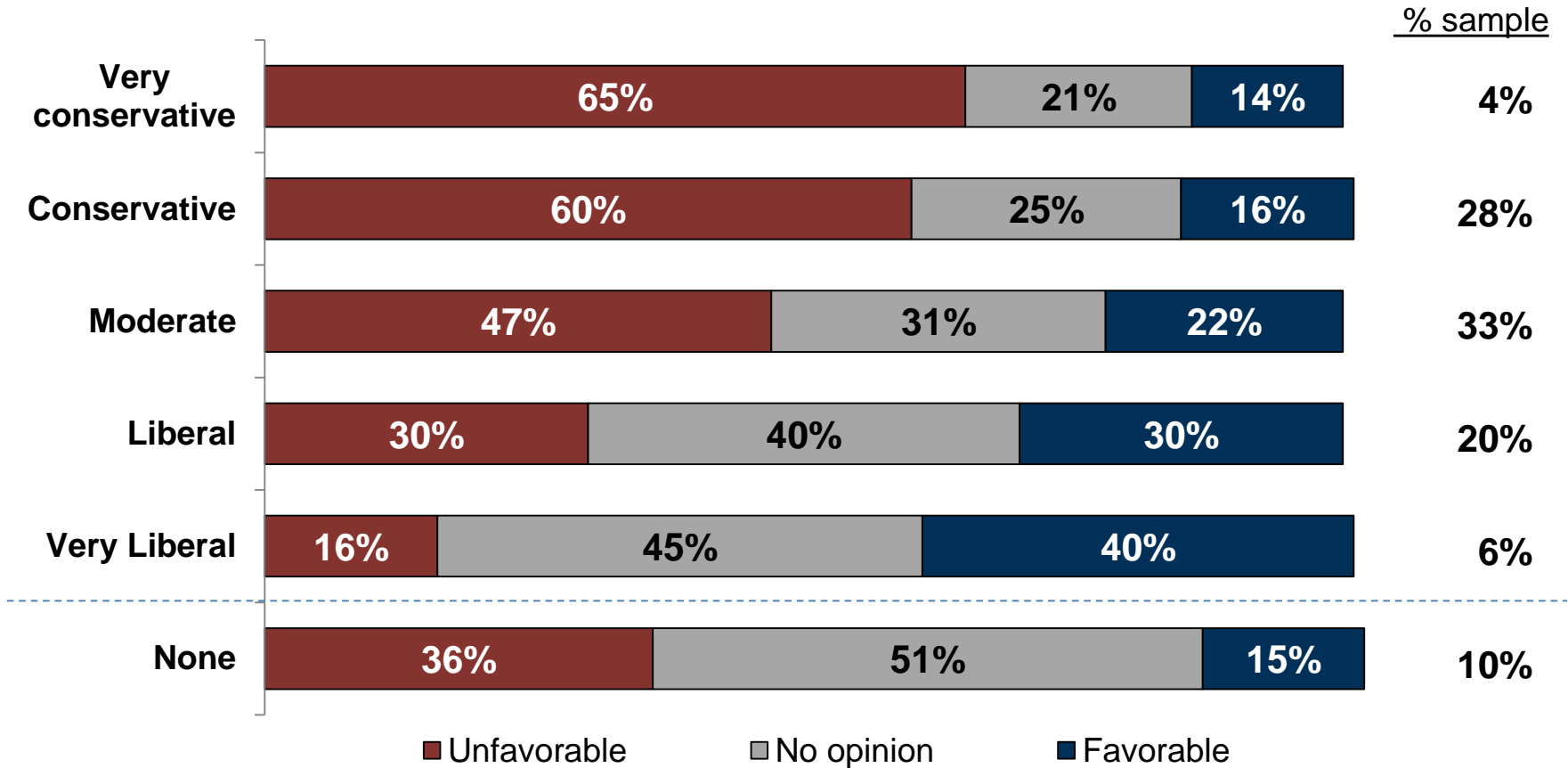


<sup>1</sup> Unlike Gallup ratings, our image question provides respondents a neutral midpoint (which signifies don't know, no opinion, in middle) – these results suggest many who choose “favorable” in Gallup are actually neutral (and lean positive on a forced choice)

# Demographic Differences

Ideology is most significant driver of Americans' views of Mexico

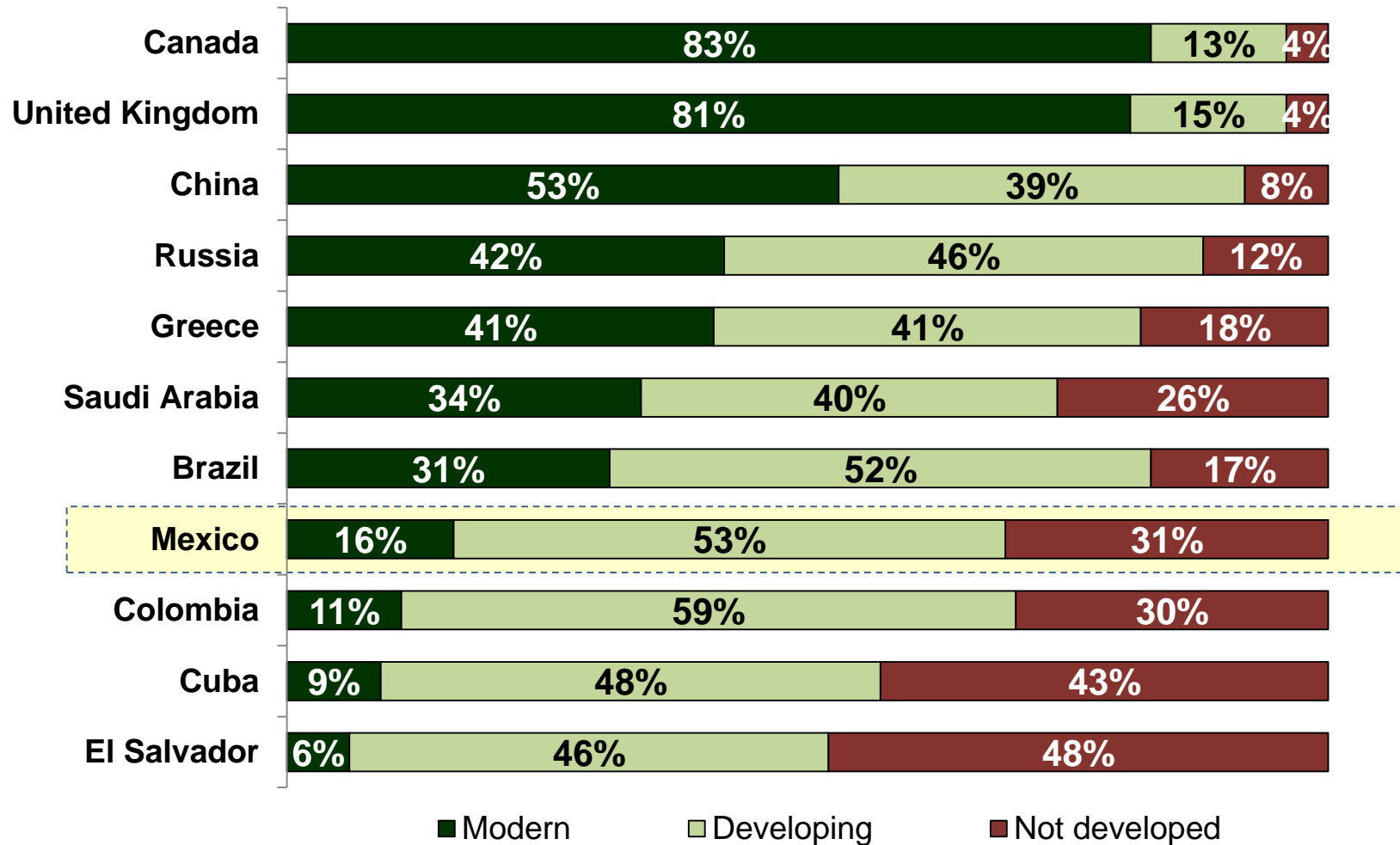
View of Mexico  
(by Political Ideology)



# Views of Country Economies

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

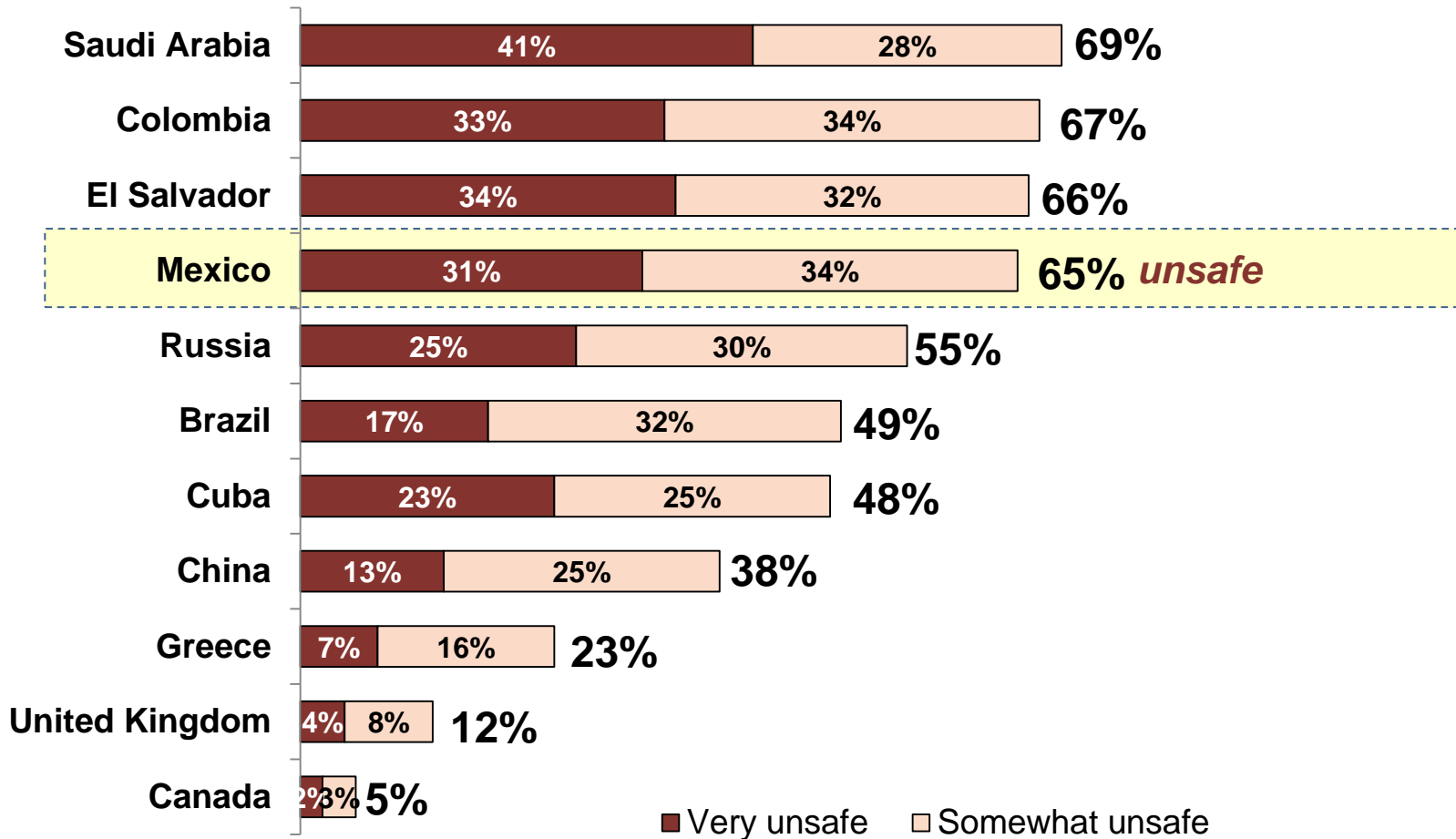
Again, thinking about those same countries, based on what you know, would you describe each of their economies as modern, developing or not developed? [Randomize]



# Perceptions of Travel Safety

Mexico seen as about as dangerous for travel as Saudi Arabia, Colombia, El Salvador

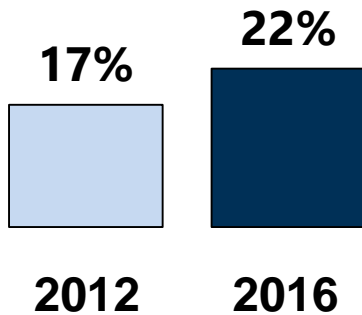
Finally, thinking about those same countries one last time, how safe or unsafe would you feel about traveling to each one on vacation or for business? [Randomize]



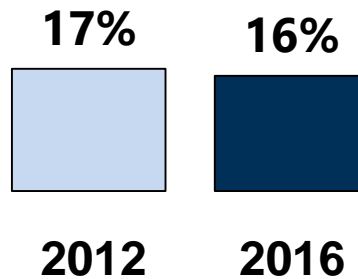
# Key Measures: 2016 vs. 2012

Status quo views of Mexico

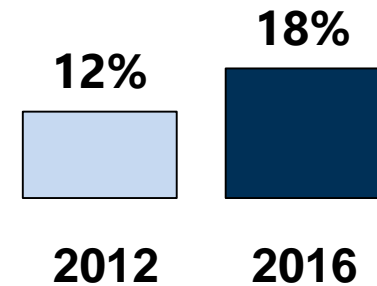
## Positive Image



## Modern Economy



## Safe for Travel

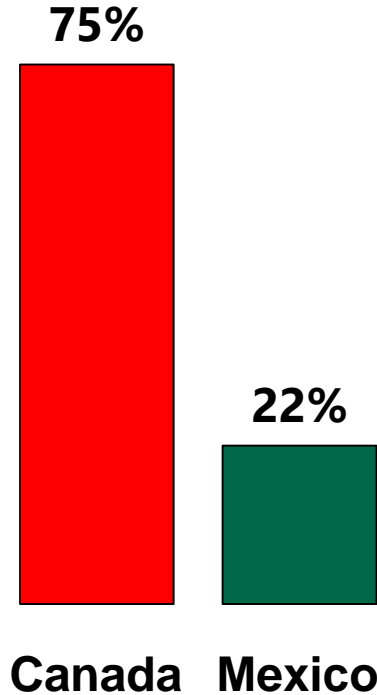




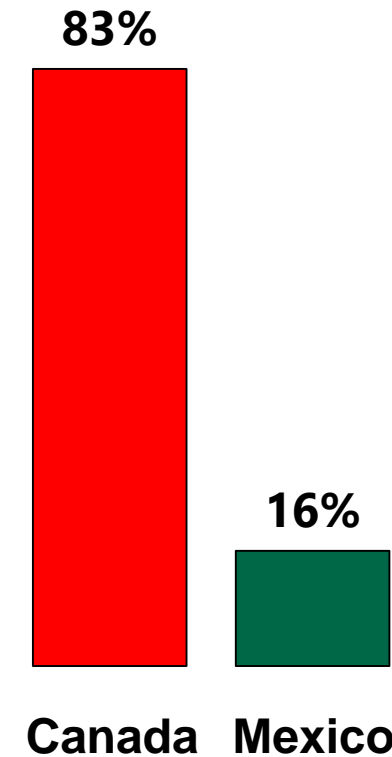
# Key Measures: Mexico vs. Canada

A tale of two images in the American mind

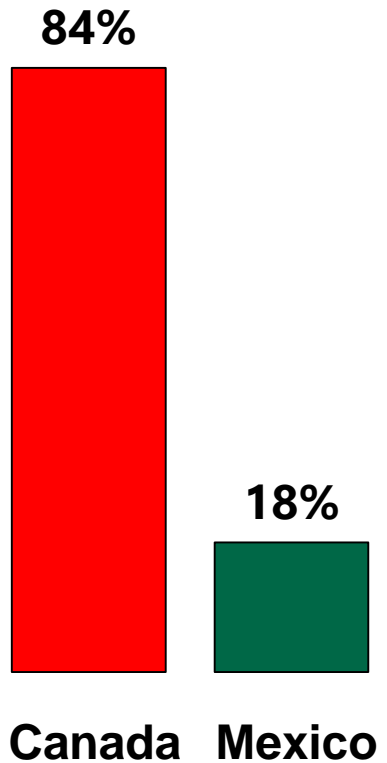
Positive Image



Modern Economy



Safe for Travel



# Reasons for Mexico Image Ratings

## Drug violence remains 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 <sup>1</sup>	% <sup>2</sup>
Drugs/Cartels/Crime/Violence/Unsafe	36%
Don't know/Not familiar enough	16%
Corruption	12%
Other	10%
Depends on where you go/Some places safe	7%
Good people/Developing/Trying hard/Like it	7%
Illegal immigration/Border crossings	6%
Negative general comment	5%
Poverty/poor	4%
Good place to visit/Things to see/Safe places	4%
Positive general comment	3%

<sup>1</sup> Open-end question – responses have been categorized

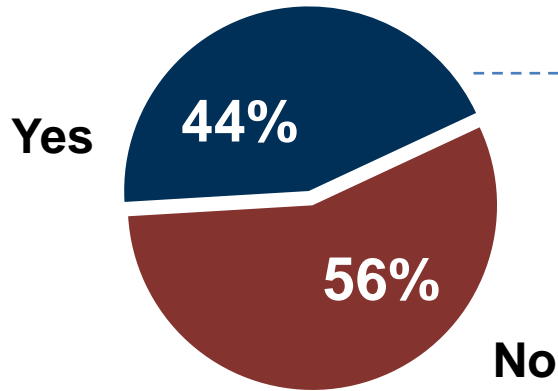
<sup>2</sup> Numbers sum to more than 100% because many respondents mentioned multiple things



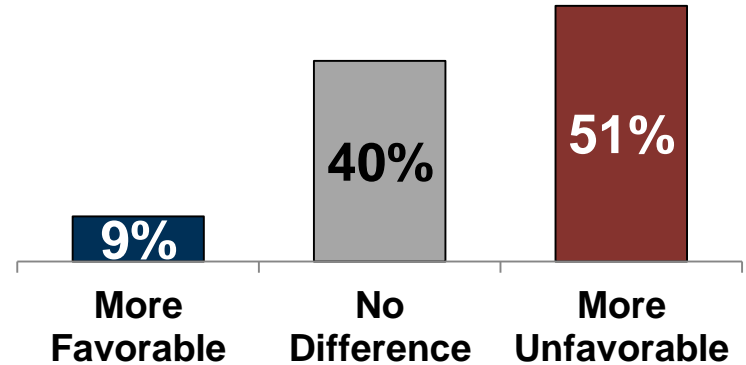
# Information Flow

## 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 heard<sup>1</sup>

- 28% Drug problems/Cartels/Drug violence
- 15% Murder/Crime/Safety concerns
- 14% Donald Trump/Trump comments/Reaction
- 14% Illegal immigration/Border crossings
- 6% Corruption
- 6% Border wall
- 5% El Chapo
- 3% Tourism
- 2% Economy

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

# 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<sup>1</sup>. [Randomize]

Statement	Agree	Disagree	No opinion	Net agree
Mexico has a rich cultural heritage	76%	10%	13%	+66%
Products made in Mexico are safer than products made in China	37%	22%	41%	+15%
Mexico has a large, growing middle class	29%	36%	36%	-7%
Mexico is a good place to do business	35%	39%	26%	-4%
Mexico is a strong democracy	23%	48%	18%	-25%
Mexico is a dangerous and unstable country	65%	22%	13%	+43%
Mexico is winning the fight against the drug cartels and traffickers	13%	70%	17%	-57%
The Mexican government is corrupt	72%	9%	19%	+63%

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

# Key Attributes: 2016 vs. 2012

## Status quo views of Mexico

Rich cultural heritage

Products safer than China

Large growing middle class

Good place to do business

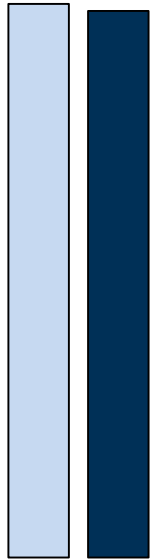
Strong democracy

Dangerous unstable country

Winning drug fight

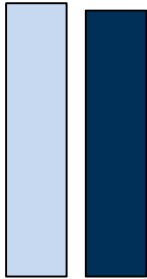
Corrupt government

77% 76%



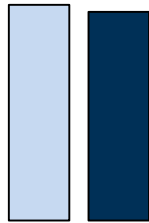
2012 2016

38% 37%



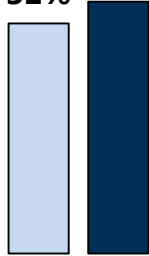
2012 2016

30% 29%



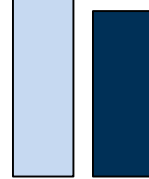
2012 2016

32% 35%



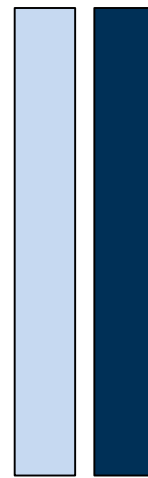
2012 2016

25% 23%



2012 2016

65% 65%



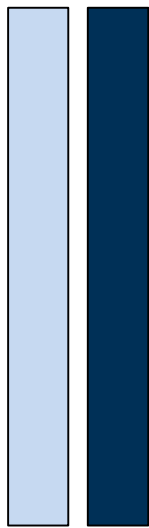
2012 2016

10% 13%



2012 2016

72% 72%

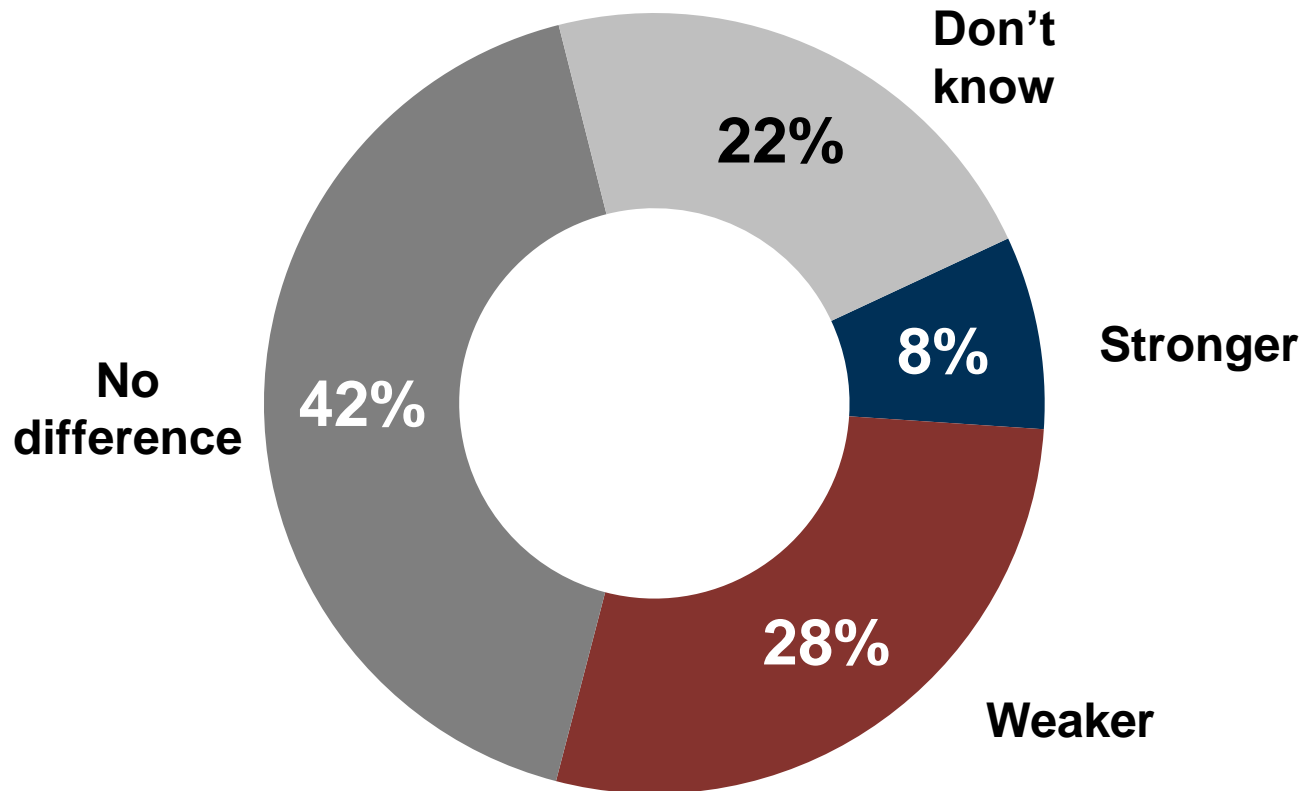


2012 2016

# U.S. Relationship with Mexico (I)

Most see it as unchanged or don't know enough

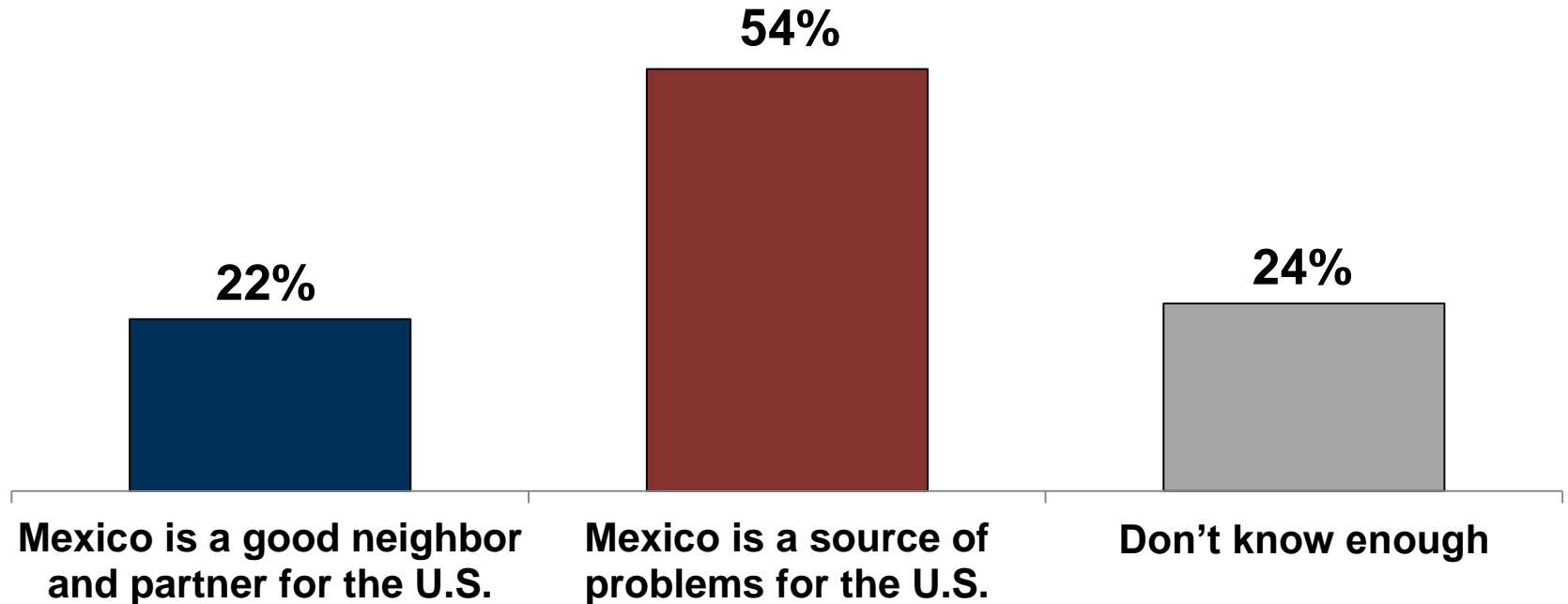
Do you think the U.S. relationship with Mexico has gotten stronger, has gotten weaker or has been mostly unchanged during the past four years?



# U.S. Relationship with Mexico (II)

Mexico seen 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?



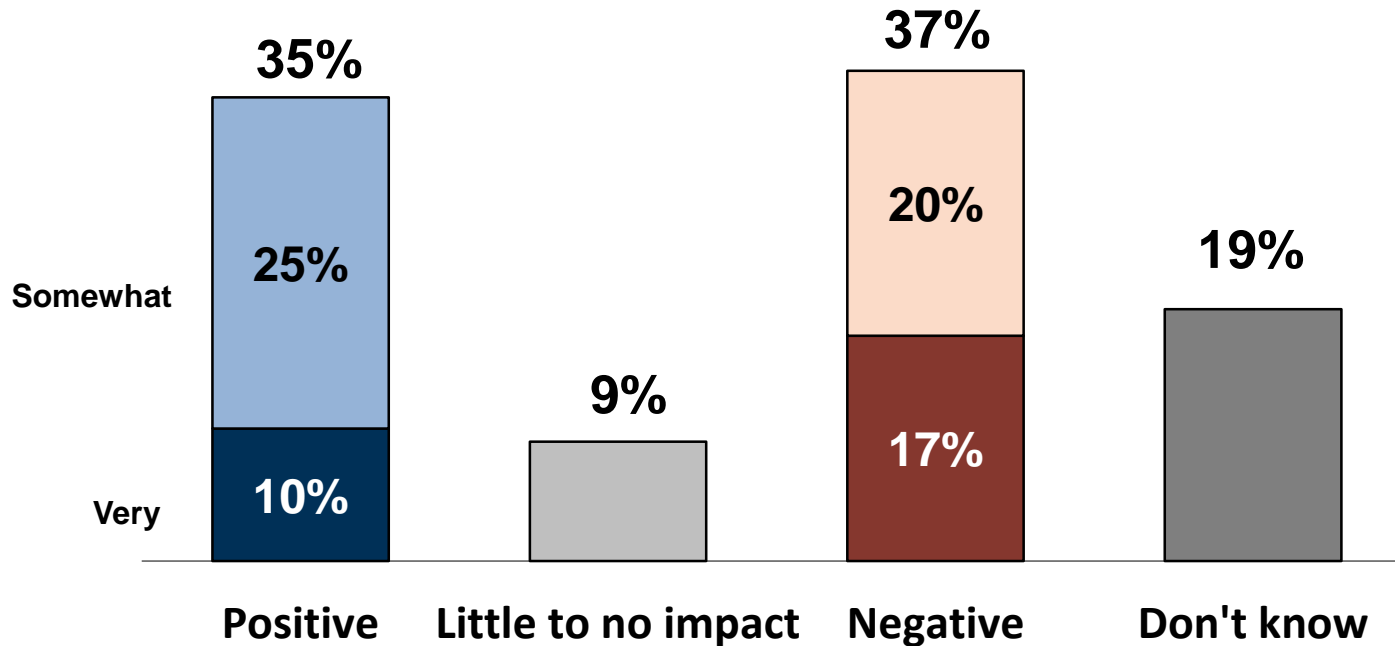
<i>Rep</i>	10%	75%	15%
<i>Dem</i>	36%	36%	29%
<i>Ind</i>	18%	63%	19%



# U.S. Relationship with Mexico (III)

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

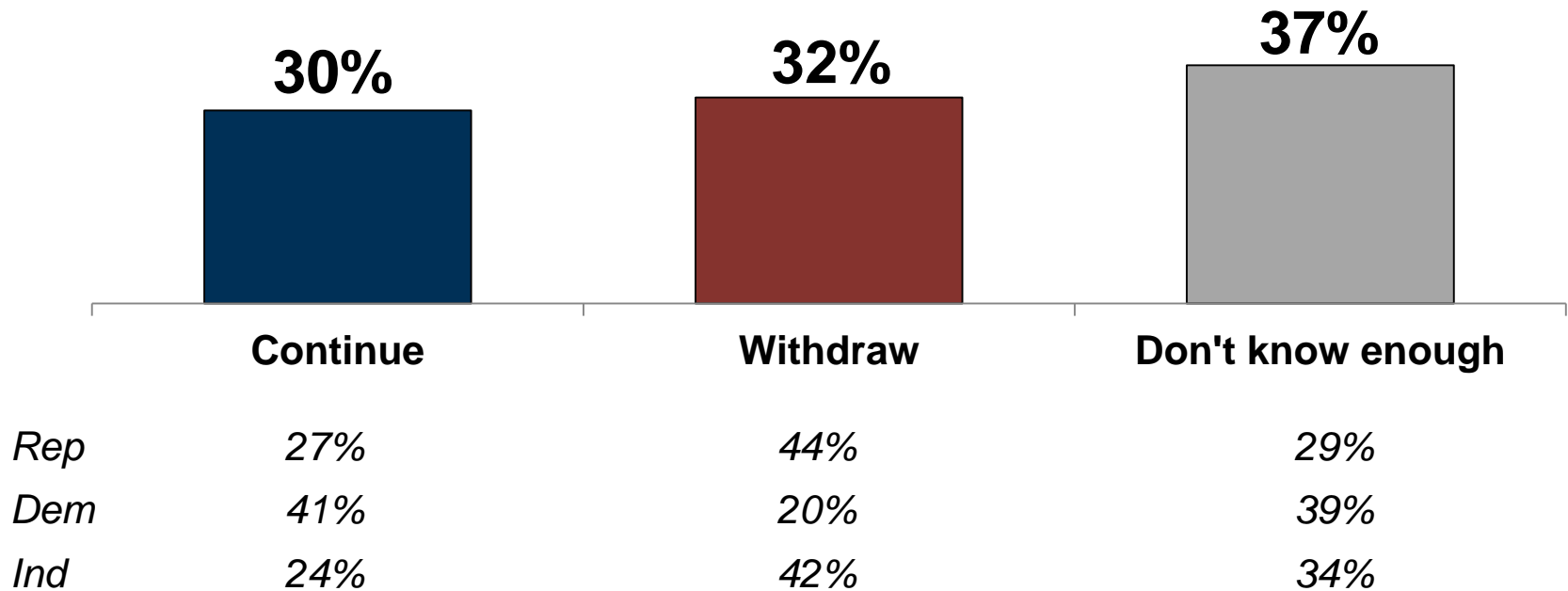
As you may know, Mexico is a major trading partner of the U.S. What kind of overall impact – if any – do you think this relationship has had on the American economy?



# U.S. Relationship with Mexico (IV)

## Americans are split on whether to continue in NAFTA

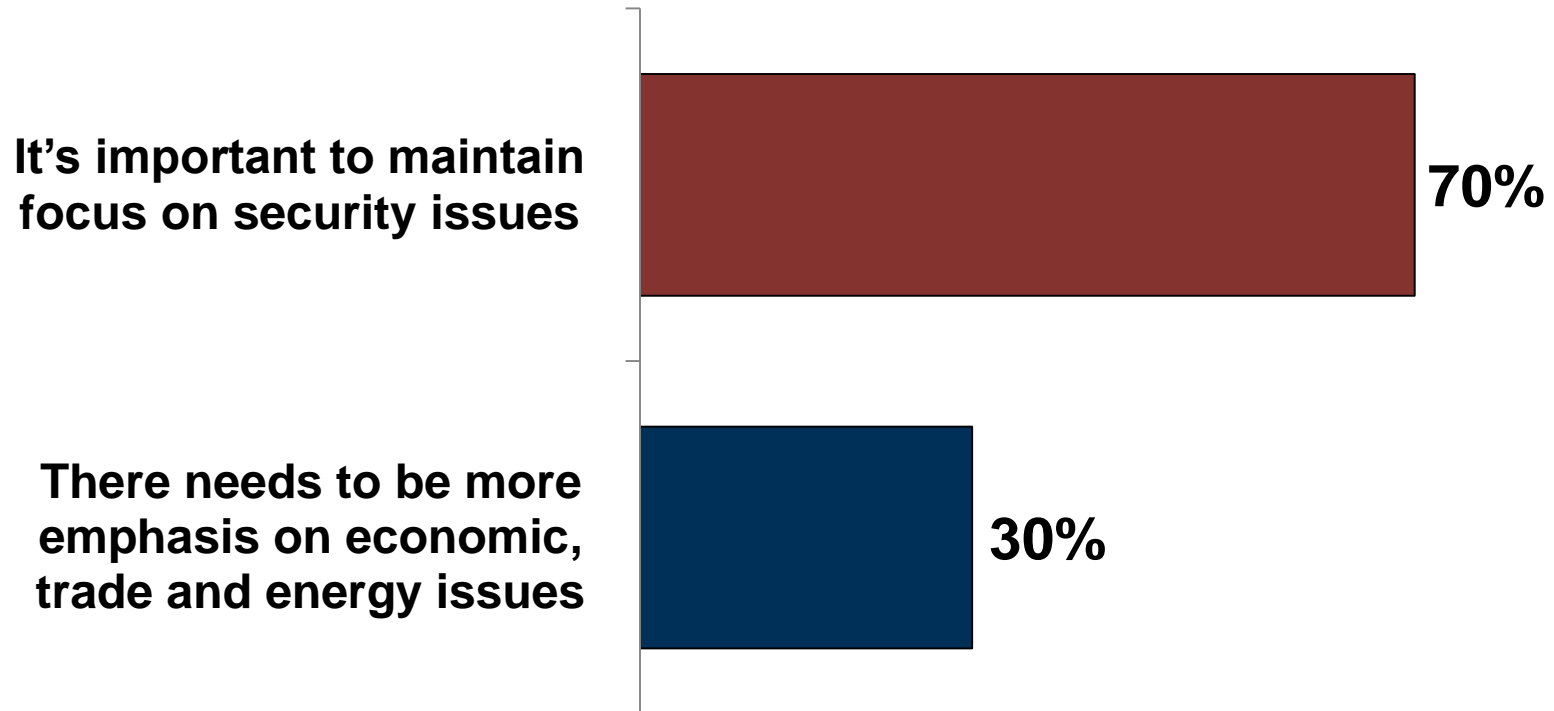
In 1994 the United States entered the North American Free Trade Agreement, or NAFTA, which eliminated trade barriers for goods and services between Mexico, Canada, and the U.S., and promoted competition and investment in the region. Do you think the United States should continue to be a partner in NAFTA or do you think it should withdraw from NAFTA?



# U.S. Relationship with Mexico (V)

## Large majority want bilateral relationship focused on security

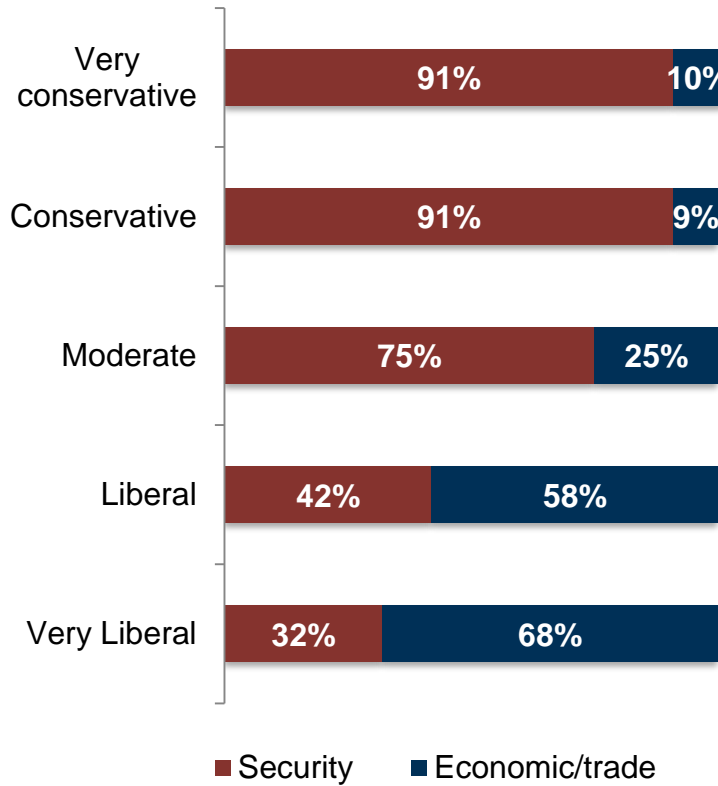
In recent years, the relationship between the U.S. and Mexican governments has largely focused on security issues such as border control and drug trafficking. Thinking about the future of the U.S.-Mexico relationship, which of the following views is closer to your own?



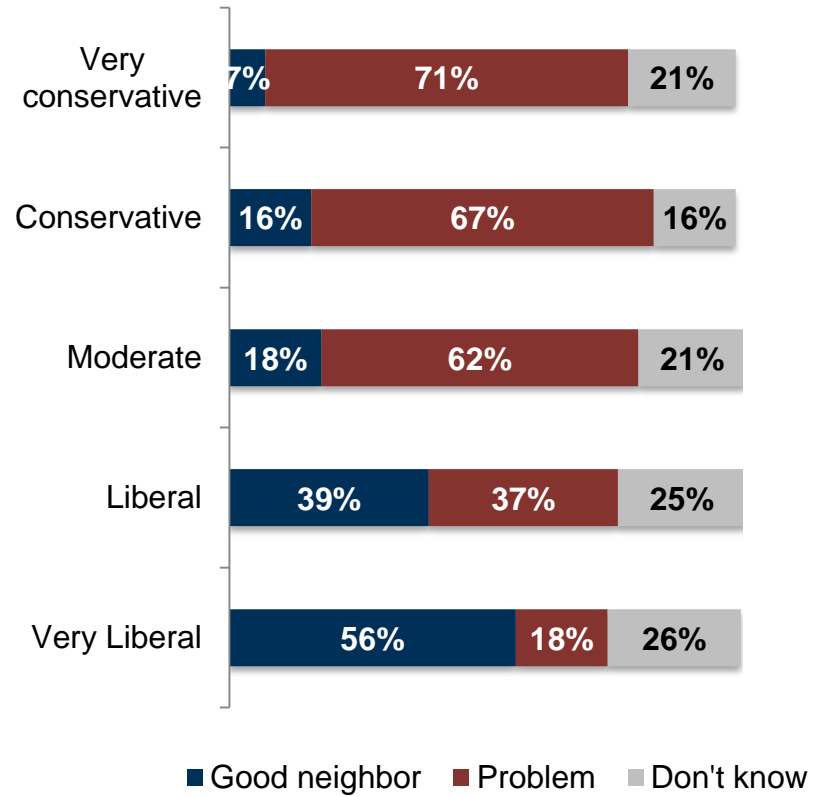
# Demographic Differences (II)

Again, ideology is a significant driver of attitudes toward Mexico

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



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

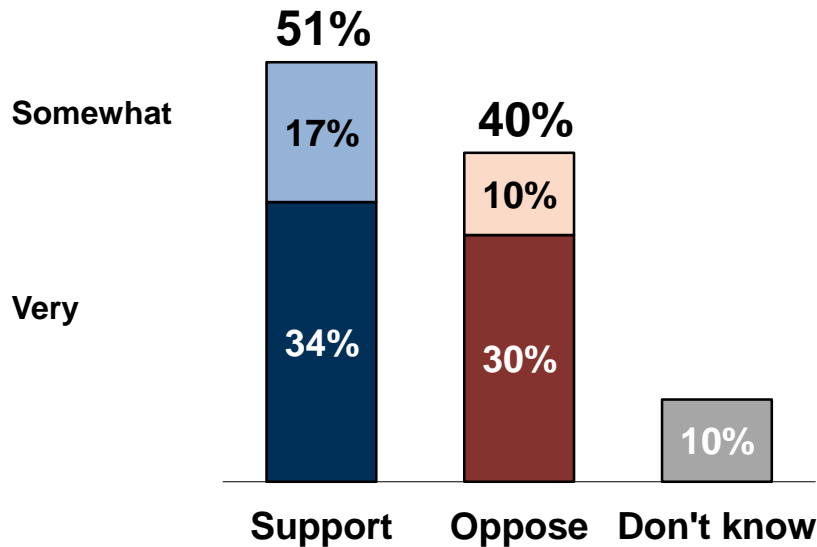


# Border Walls

Majority favors southern border wall, opposes northern one

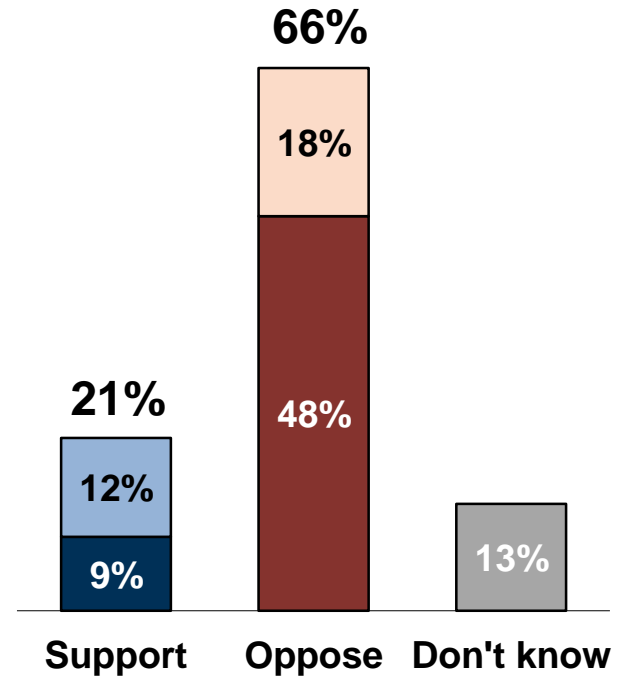
## Southern Wall

Do you support or oppose building a wall along the **U.S.-MEXICO** border?



## Northern Wall

Do you support or oppose building a wall along the **U.S.-CANADA** border?



<i>Rep</i>	79%	17%	4%	28%	63%	8%
<i>Dem</i>	30%	61%	9%	16%	74%	10%
<i>Ind</i>	58%	32%	10%	24%	65%	11%

# Paying for Border Walls

Deep skepticism that Mexico or Canada would foot the bill

Some have suggested that **MEXICO** would pay the U.S. for the cost of building a wall along the southern border: How likely or unlikely do you think it is that Mexico would pay for the wall?



**16% think it's likely Mexico would pay for wall<sup>1</sup>**

How likely or unlikely do you think it is that **CANADA** would pay for the cost of building a wall along the northern border?



**10% think it's likely Canada would pay for wall<sup>2</sup>**

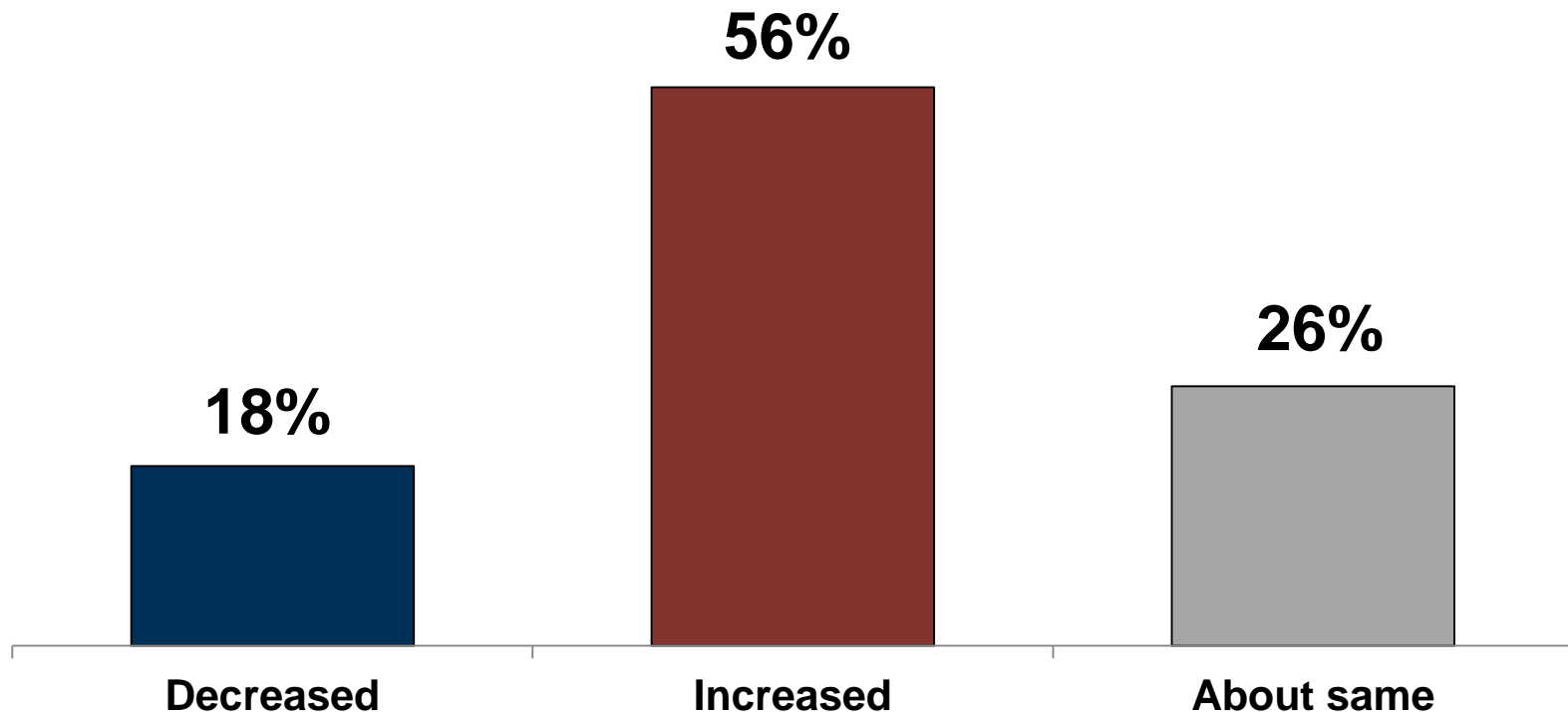
<sup>1</sup> 73% think it is unlikely (including 62% who think it's very unlikely) and 11% don't know

<sup>2</sup> 77% think it is unlikely (including 64% who think it is very unlikely) and 13% don't know

# Immigration from Mexico

## Americans believe illegal immigration from Mexico is growing

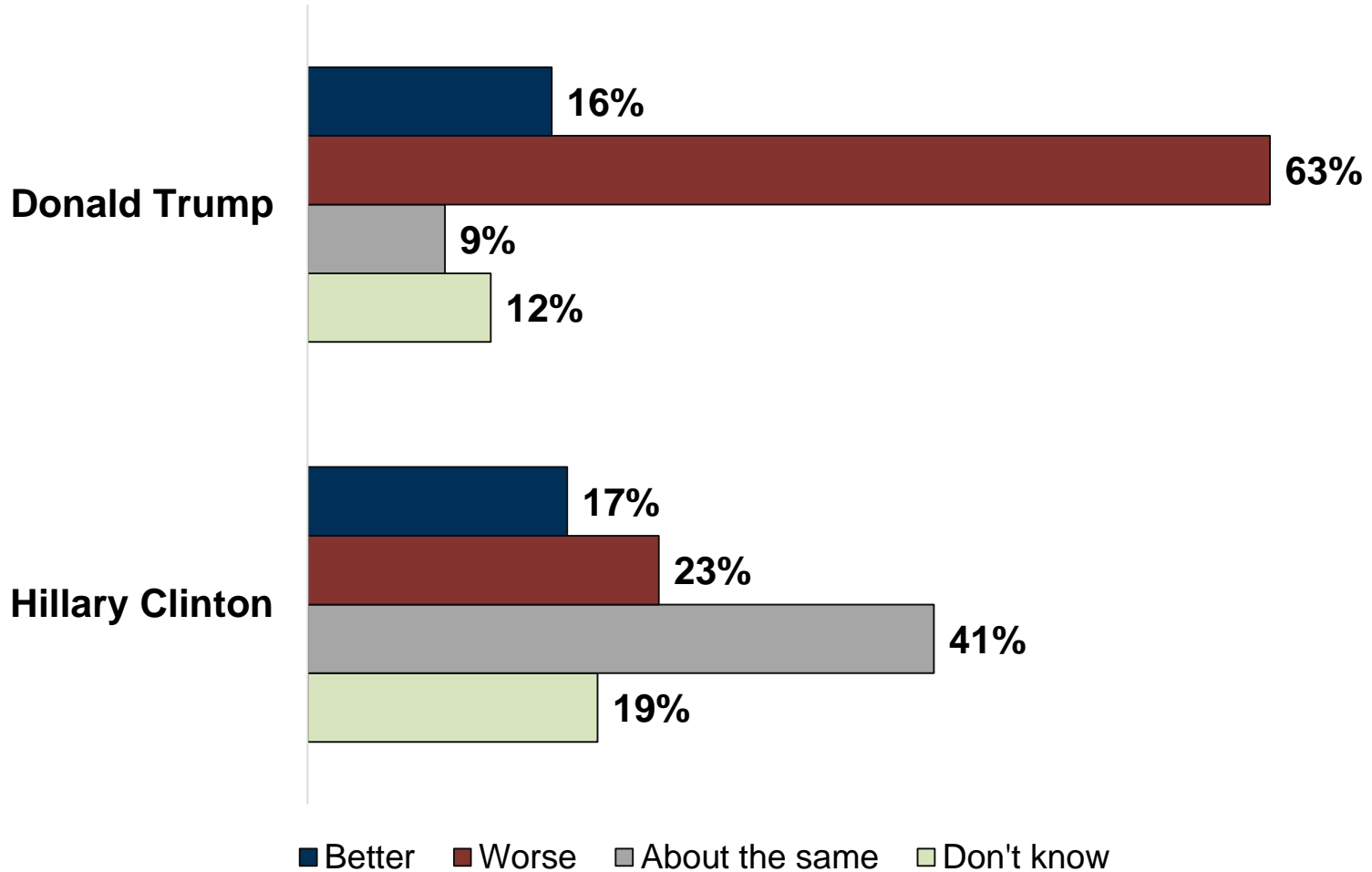
Do you think the number of Mexican immigrants coming to the U.S. illegally has Increased, decreased, or stayed about the same in the last five years?



# Presidential Candidates and Relations with Mexico

## Majority see relations under President Trump getting worse

If \_\_\_\_\_ were elected president, do you think the U.S. relationship with Mexico will get better, get worse, or remain about the same as it is today?





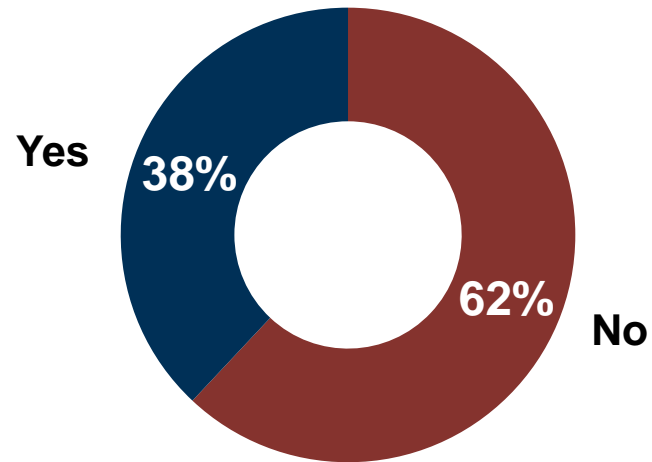
# Travel and Relationships

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

Which best describes your travel to Mexico?

Travel Frequency		%
42%	I've been there once	17%
	I've been there a few times	20%
	I've been there many times	5%
	I travel there frequently	1%
	I've never been there	55%

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



How likely are you to travel there in the next year?	Very likely	5%
	Somewhat likely	10%
	Somewhat unlikely	13%
	Very unlikely	71%

# About Vianovo and GSD&M



**Vianovo** is leading international 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, IBM, and MD Anderson.



Founded in 1971, GSD&M is a creatively driven, full-service agency headquartered in Austin, Texas, that believes when you pay the price to understand the problem and apply that insight to solve courageously, the reward is ideas that make a difference. With a restless culture and purpose as a guiding force, GSD&M builds brands with a fully integrated creative, media and analytics approach. For more information, visit [GSDM.com](http://GSDM.com).

# Appendix

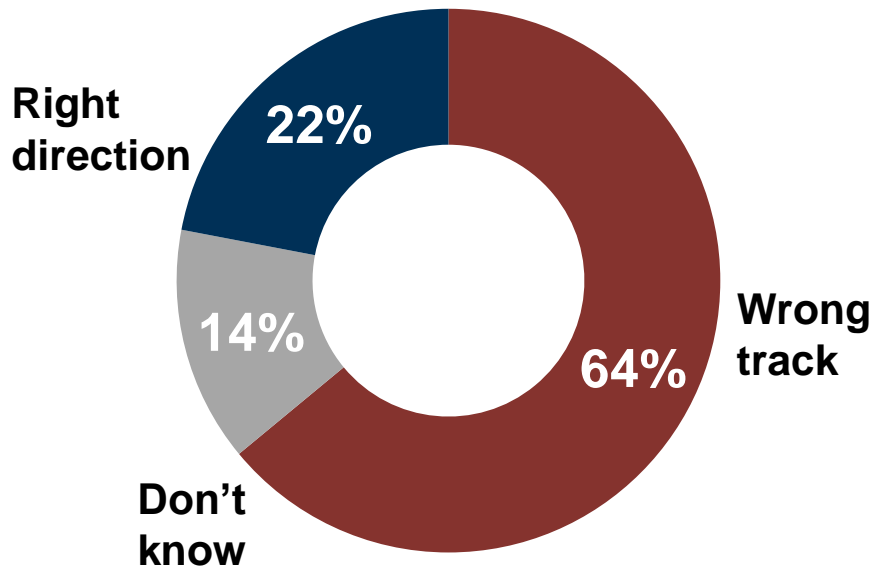
U.S POLITICAL LANDSCAPE

OTHER DEMOGRAPHIC ANALYSIS

# U.S. Political Landscape

Americans see their country on the wrong track and overwhelmingly identify economy & jobs as the top issue

Would you say things in the U.S. today are generally headed in the right direction or off on the wrong track?



Which of the following would you say is the most important problem facing this country today? [Randomize]

Issue	%
Economy/Jobs	35
Terrorism	15
Immigration	12
The federal deficit	10
Education	6
Border security	5
Taxes	3
Gas prices	2
Other	11

# U.S. Presidential Election

## A tight race as of early June

Finally, if the presidential election were being held today, for whom would you vote?  
(Among 707 registered voters)

### 2-WAY BALLOT

#### Clinton v. Trump

Hillary Clinton	37%
Donald Trump	36%
Other	15%
Undecided/Not Voting	12%

### 3-WAY BALLOT

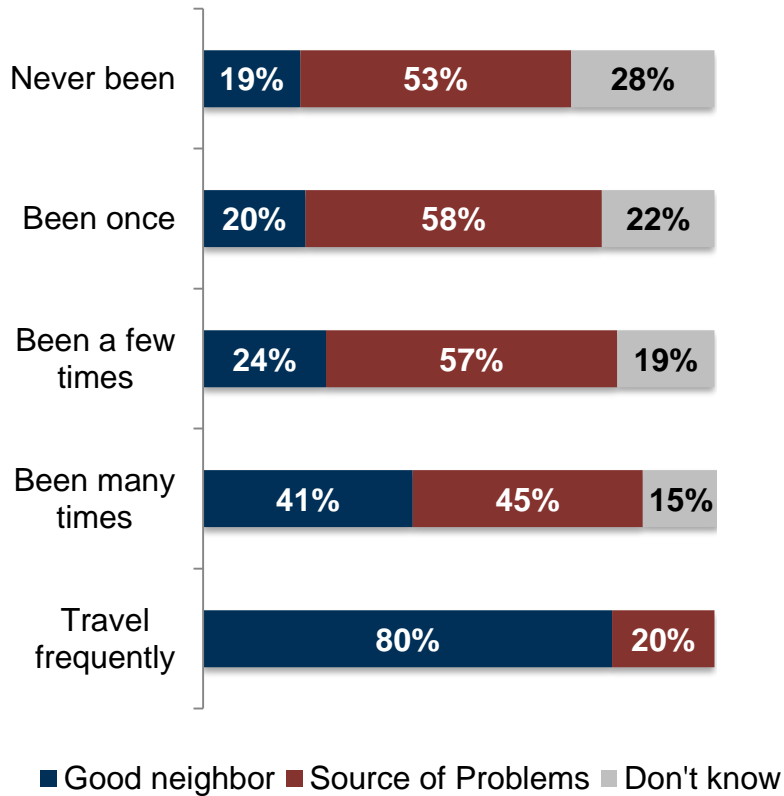
#### Clinton v. Trump vs. Johnson

Hillary Clinton	38%
Donald Trump	35%
Gary Johnson	9%
Other	8%
Undecided/Not Voting	11%

# 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)

