



# Global Soft Power Index 2025

*The world's most comprehensive research study  
on perceptions of nation brands*



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# About Brand Finance

**Brand Finance is the world's leading brand evaluation and strategy consultancy.**

## *Bridging the gap between Marketing and Finance*

Brand Finance was set up in 1996 with the aim of 'bridging the gap between marketing and finance'. Since this time, we have helped companies and organisations of all types to connect their brands to the bottom line.

## *Quantifying the financial value of brands*

We put thousands of the world's biggest brands to the test every year. Ranking brands across all sectors and countries, we publish over 100 reports annually.

## *Unique combination of expertise*

Our teams have experience across a wide range of disciplines from marketing and market research, to brand strategy and visual identity, to tax and accounting.

## *Priding ourselves on technical credibility*

Brand Finance, a chartered accountancy firm regulated by the Institute of Chartered Accountants in England and Wales, is the first brand valuation consultancy to join the International Valuation Standards Council.

Our experts crafted standards (ISO 10668 and ISO 20671) and our methodology, certified by Austrian Standards, is officially approved by the Marketing Accountability Standards Board.

## *We advise governments on how to boost their nation brands*

Brand Finance has been conducting an annual Nation Brands study on the world's most valuable and strongest nation brands for 21 years. It has provided key benchmarks for diplomats, tourism boards, trade agencies, nation brand consultants and managers.

The Global Soft Power Index expands on that methodology to provide an all-round view of perceptions of nation brands. Understanding those perceptions is key for national, regional, city, and corporate brands to achieve success internationally, allowing to identify strengths and weaknesses and to improve growth strategies going forward.

The stronger the nation's Soft Power, the greater its ability to attract investments, market its products and services, promote tourism, and invite talent.



# Get in Touch

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For more information, please visit our website:  
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**Zhang Li**, Director of China National Tourist Office in London

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Designed for the visionary — policymakers, strategists, marketing professionals, and diplomacy leaders — this report serves as your roadmap to navigate the worldwide nation branding landscape.

By integrating perception research with financial data, you gain the insight to get ahead of others in the global arena — grow Soft Power and devise successful strategies to attract investment, trade, talent, and tourism.

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## Benchmarking

Compare your brand to competitors and track year-on-year changes

## Strategy

Adjust brand positioning and set long-term goals to maximise economic impact

## Accountability

Measure ROI and modify marketing budgets to support your brand's strategic goals

## Communication

Publicise strong results to reassure key stakeholders of your brand's strength

## Education

Educate key stakeholders about the benefits of brand management

# Introduction

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**David Haigh**  
Chairman,  
Brand Finance

In an increasingly interconnected and competitive world, understanding how nations are perceived has never been more critical.

As global challenges and opportunities evolve, so too does the practice of Soft Power management. Over the past five to six years, we have witnessed a profound transformation in how countries strategically approach nation branding. This shift reflects the growing recognition of the importance of Soft Power and the realisation that effective management is a cornerstone of long-term success.

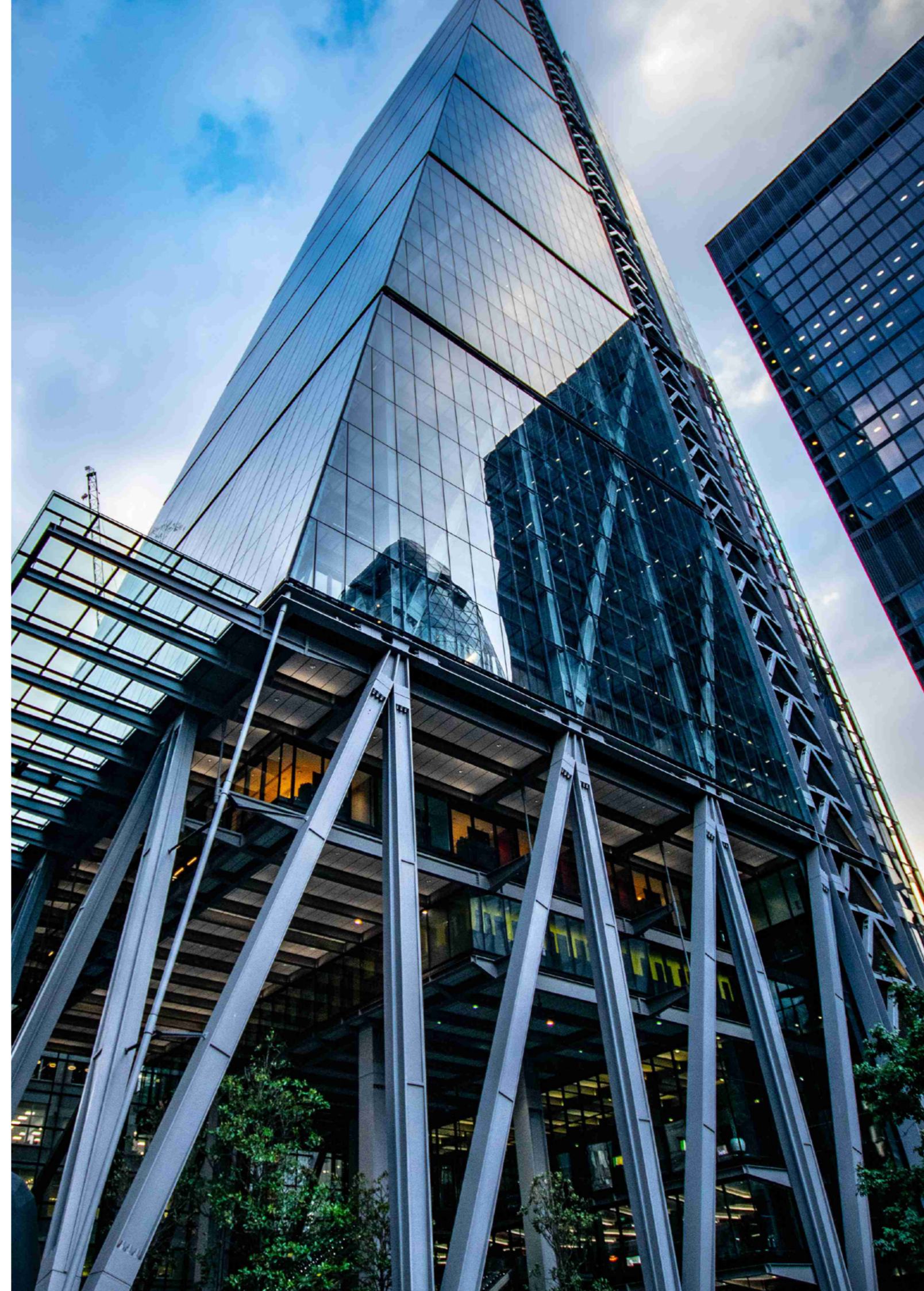
At the heart of strategic leadership lies the principle of measurement. As the saying goes, "What gets measured gets managed." The Global Soft Power Index is the definitive tool for this purpose, offering a comprehensive and objective measure of how nations are perceived globally. It enables governments, businesses, and other key stakeholders to understand their standing on the world stage and identify areas of strength and opportunities for improvement.

Yet, measurement is only the first step. To navigate the complexities of the modern world, leaders must adopt a strategic approach beyond reacting to immediate challenges. This means asking fundamental questions: What do we stand for as a nation? What do our stakeholders—whether they be citizens, investors, or international partners—value most about us? And how can we craft a narrative that resonates with these audiences and equips us to weather the inevitable headwinds of global competition?

The answers to these questions are critical for managing perceptions and building a sustainable and compelling vision for the future. Soft Power is no longer a passive asset but a competitive advantage that must be nurtured actively. The stakes are higher as more countries engage in nation branding with increasing sophistication. Success requires a long-term commitment to understanding how others perceive us and aligning those perceptions with our strategic goals.

The Global Soft Power Index 2025 reflects this evolving landscape. It is both a benchmark and a guide, illuminating the path forward for nations seeking to lead and thrive globally. By harnessing its insights, leaders can take informed, decisive actions to enhance their Soft Power and ensure their country's position in an increasingly competitive world.

I invite you to explore this year's findings, reflect on global perception trends, and consider how your nation can strategically leverage Soft Power to build a brighter future.



# Foreword



**Dr Paul Temporal**

Associate Fellow,  
Saïd Business School,  
University of Oxford

In a year punctuated with ‘fake news,’ conflict, and exercises in Hard Power, the sixth annual Global Soft Power Index continues to highlight the benefits of conscious nation branding while indicating the peculiar branding challenges facing governments worldwide.

The Index looks at all 193 member states of the UN through a truly global survey of over 170,000 respondents across 100 markets on all inhabited continents.

Rather like the financial balance sheet of a company, each Index provides a snapshot of one moment in time, but when successive indices or balance sheets are read together, they form a narrative. This allows for the tracking of changing perceptions of an individual nation over time but also paints a broader picture of the influences and timescales of fluctuations in Soft Power.

The Index is based on perceptions, which to those involved, reflect reality. Though it is possible to change how others see us, it is not easy. And if not managed carefully, perceptions can be stubbornly persistent.

It is critical to remember that people derive many beliefs from an increasingly complex and unreliable media landscape. Whether positive or negative and based on fact or fiction, attention is the currency

and the algorithms that direct attention are opaque and unregulated. This makes it more difficult for countries to manage perceptions, but it is also more important that they do so proactively and strategically.

Social media posts can sometimes be thought of as trivial, and an oft-cited concern about responding to them is that engagement amplifies their importance – but given the way we share and take in information, they cannot be ignored. In addition to nation-branding efforts, governments should ensure that they are benefiting from excellent strategic communications advice to manage evolving approaches to communications.

Nation branding helps audiences, both foreign and domestic, to understand what they stand for and how they are differentiated from other countries. It supports businesses and other organisations that engage internationally.

Nations that have been intentional about their branding decisions have reaped benefits such as export growth, increased tourism, greater access to global markets and even the reversal of negative perceptions. For example, China’s conscious efforts to increase Soft Power have had a noticeable effect, significantly increasing its scores in six out of eight pillars and two-thirds of attributes.



Seeing the biggest increases in their previously bottom-ranked attributes, such as ‘generous,’ ‘good relations with other countries,’ and ‘easy to communicate with,’ is evidence that understanding one’s own perception is the first step to changing it.

The Index investigates the broad themes of Soft Power by asking questions at an increasingly granular level of detail. These vary in importance depending on what countries are hoping their nation brand will achieve – from attracting foreign investment to becoming a more popular tourist destination – and should be welcomed by governments as raising useful questions about where they should be directing their branding efforts.

Perceptions, as I said, can become entrenched; as a result, many are demonstrably outdated. But in some cases, the time and costs that would be involved in correcting these views might simply not be worth it. The United States remains at the top of the Index, but its stagnation in overall scores caused by a decline in key pillars such as Governance and People and Values

suggests that making America’s perception great again in these areas may be a harder sell than strengthening attitudes along the pillars of Familiarity and Influence, International Relations, Media and Communications, or Business and Trade.

Conversely, if perceptions of your nation exceed what you believe to be the truth, is this an indication of where other practical work is needed to ensure that the reality matches up to the image?

Governments can obtain substantial benefits from effective public sector organisations and national brands. Soft Power strategies greatly increase their capabilities to accurately target and change perceptions. The Index plays an important role in benchmarking international attitudes and pointing the way to the creation and adoption of successful nation brand strategies.

# Global Soft Power Index 2025

The ranking of all 193 member states of the United Nations, scored out of 100, according to the results of a survey of 170,000+ respondents in 100+ markets


























1 = 1  <b>UNITED STATES</b> Score <b>79.5</b> +0.7	2 ▲ 3  <b>CHINA</b> Score <b>72.8</b> +1.6	3 ▼ 2  <b>UNITED KINGDOM</b> Score <b>72.4</b> +0.6	4 = 4  <b>JAPAN</b> Score <b>71.5</b> +0.9	5 = 5  <b>GERMANY</b> Score <b>70.1</b> +0.3
6 = 6  <b>FRANCE</b> Score <b>68.5</b> +1.2	7 = 7  <b>CANADA</b> Score <b>65.2</b> +0.8	8 = 8  <b>SWITZERLAND</b> Score <b>64.9</b> +2.0	9 = 9  <b>ITALY</b> Score <b>62.4</b> +0.4	10 = 10  <b>UNITED ARAB EMIRATES</b> Score <b>60.4</b> +0.7
11 ▲ 12  <b>SWEDEN</b> Score <b>60.3</b> +1.3	12 ▲ 15  <b>SOUTH KOREA</b> Score <b>60.2</b> +2.2	13 ▼ 11  <b>SPAIN</b> Score <b>59.7</b> +0.5	14 ▼ 13  <b>AUSTRALIA</b> Score <b>59.6</b> +1.0	15 ▼ 14  <b>NETHERLANDS</b> Score <b>58.7</b> +0.5
16 = 16  <b>RUSSIA</b> Score <b>58.1</b> +0.4	17 = 17  <b>NORWAY</b> Score <b>56.8</b> -	18 ▲ 19  <b>DENMARK</b> Score <b>56.5</b> +1.0	19 ▲ 20  <b>BELGIUM</b> Score <b>56.0</b> +0.8	20 ▼ 18  <b>SAUDI ARABIA</b> Score <b>55.6</b> -0.4
21 ▲ 22  <b>SINGAPORE</b> Score <b>55.6</b> +1.2	22 ▼ 21  <b>QATAR</b> Score <b>54.5</b> -	23 ▲ 24  <b>FINLAND</b> Score <b>54.5</b> +0.6	24 ▼ 23  <b>AUSTRIA</b> Score <b>53.9</b> -0.3	25 ▲ 26  <b>NEW ZEALAND</b> Score <b>53.1</b> +0.6

\* All data points have been rounded to the first decimal place.








26 ▼ 25  <b>TÜRKIYE</b> Score <b>52.9</b> -0.8	27 = 27  <b>PORTUGAL</b> Score <b>51.1</b> +1.0	28 = 28  <b>IRELAND</b> Score <b>50.5</b> +0.6	29 ▲ 30  <b>LUXEMBOURG</b> Score <b>50.0</b> +1.0	30 ▼ 29  <b>INDIA</b> Score <b>49.8</b> -
31 = 31  <b>BRAZIL</b> Score <b>48.8</b> -	32 ▲ 33  <b>POLAND</b> Score <b>48.7</b> +0.1	33 ▼ 32  <b>ISRAEL</b> Score <b>47.8</b> -0.9	34 ▲ 36  <b>GREECE</b> Score <b>46.8</b> +1.2	35 ▼ 34  <b>ICELAND</b> Score <b>46.2</b> +0.4
36 ▼ 35  <b>MALAYSIA</b> Score <b>46.1</b> +0.4	37 ▲ 42  <b>MONACO</b> Score <b>45.9</b> +2.1	38 ▲ 39  <b>EGYPT</b> Score <b>45.4</b> +0.5	39 ▲ 40  <b>THAILAND</b> Score <b>45.4</b> +0.6	40 ▼ 37  <b>KUWAIT</b> Score <b>45.3</b> -
41 ▲ 43  <b>SOUTH AFRICA</b> Score <b>44.9</b> +1.2	42 ▼ 38  <b>ARGENTINA</b> Score <b>44.7</b> -0.3	43 ▼ 41  <b>MEXICO</b> Score <b>44.3</b> +0.3	44 ▲ 46  <b>CZECHIA</b> Score <b>43.5</b> +1.2	45 = 45  <b>INDONESIA</b> Score <b>42.9</b> +0.3
46 ▼ 44  <b>UKRAINE</b> Score <b>42.0</b> -1.0	47 ▲ 48  <b>HUNGARY</b> Score <b>41.9</b> +0.5	48 ▼ 47  <b>CROATIA</b> Score <b>41.2</b> -0.6	49 = 49  <b>OMAN</b> Score <b>40.8</b> +0.2	50 = 50  <b>MOROCCO</b> Score <b>40.6</b> -

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<p>51 = 51</p>  <p><b>BAHRAIN</b></p> <p>Score <b>40.4</b> +0.4</p>	<p>52 ▲ 53</p>  <p><b>VIETNAM</b></p> <p>Score <b>39.9</b> +0.3</p>	<p>53 ▼ 52</p>  <p><b>PHILIPPINES</b></p> <p>Score <b>39.9</b> +0.1</p>	<p>54 ▲ 59</p>  <p><b>CHILE</b></p> <p>Score <b>39.5</b> +0.7</p>	<p>55 ▲ 58</p>  <p><b>ROMANIA</b></p> <p>Score <b>39.5</b> +0.7</p>
<p>56 = 56</p>  <p><b>SLOVENIA</b></p> <p>Score <b>39.5</b> +0.5</p>	<p>57 ▼ 55</p>  <p><b>MALDIVES</b></p> <p>Score <b>39.3</b> +0.1</p>	<p>58 ▲ 63</p>  <p><b>JORDAN</b></p> <p>Score <b>39.1</b> +0.6</p>	<p>59 ▼ 54</p>  <p><b>GEORGIA</b></p> <p>Score <b>39.1</b> -0.2</p>	<p>60 = 60</p>  <p><b>SLOVAKIA</b></p> <p>Score <b>39.0</b> +0.2</p>
<p>61 ▲ 69</p>  <p><b>COLOMBIA</b></p> <p>Score <b>39.0</b> +1.4</p>	<p>62 = 62</p>  <p><b>IRAN</b></p> <p>Score <b>38.9</b> +0.4</p>	<p>63 ▲ 65</p>  <p><b>CYPRUS</b></p> <p>Score <b>38.9</b> +0.9</p>	<p>64 ▲ 67</p>  <p><b>PANAMA</b></p> <p>Score <b>38.7</b> +0.8</p>	<p>65 ▼ 57</p>  <p><b>ESTONIA</b></p> <p>Score <b>38.3</b> -0.6</p>
<p>66 ▲ 68</p>  <p><b>MALTA</b></p> <p>Score <b>37.9</b> -</p>	<p>67 ▼ 66</p>  <p><b>URUGUAY</b></p> <p>Score <b>37.7</b> -0.2</p>	<p>68 ▼ 64</p>  <p><b>BULGARIA</b></p> <p>Score <b>37.7</b> -0.4</p>	<p>69 ▲ 75</p>  <p><b>SERBIA</b></p> <p>Score <b>37.4</b> +0.7</p>	<p>70 ▼ 61</p>  <p><b>LITHUANIA</b></p> <p>Score <b>37.4</b> -1.2</p>
<p>71 ▼ 70</p>  <p><b>COSTA RICA</b></p> <p>Score <b>37.1</b> -0.4</p>	<p>72 = 72</p>  <p><b>PERU</b></p> <p>Score <b>36.7</b> -0.3</p>	<p>73 ▲ 74</p>  <p><b>CUBA</b></p> <p>Score <b>36.7</b> -0.1</p>	<p>74 ▲ 88</p>  <p><b>BAHAMAS</b></p> <p>Score <b>36.6</b> +1.7</p>	<p>75 ▲ 76</p>  <p><b>NORTH KOREA</b></p> <p>Score <b>36.5</b> -0.2</p>

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<p>76 ▼ 71</p>  <p><b>LATVIA</b></p> <p>Score <b>36.5</b> -0.7</p>	<p>77 ▲ 79</p>  <p><b>NIGERIA</b></p> <p>Score <b>36.4</b> +0.1</p>	<p>78 ▼ 73</p>  <p><b>ALGERIA</b></p> <p>Score <b>36.4</b> -0.4</p>	<p>79 ▼ 77</p>  <p><b>TUNISIA</b></p> <p>Score <b>36.3</b> -0.3</p>	<p>80 ▲ 87</p>  <p><b>BELARUS</b></p> <p>Score <b>36.2</b> +1.2</p>
<p>81 ▲ 84</p>  <p><b>AZERBAIJAN</b></p> <p>Score <b>36.0</b> +0.7</p>	<p>82 ▲ 117</p>  <p><b>EL SALVADOR</b></p> <p>Score <b>35.8</b> +3.2</p>	<p>83 = 83</p>  <p><b>DOMINICAN REPUBLIC</b></p> <p>Score <b>35.8</b> +0.3</p>	<p>84 ▼ 78</p>  <p><b>PARAGUAY</b></p> <p>Score <b>35.5</b> -0.8</p>	<p>85 ▼ 82</p>  <p><b>LIECHTENSTEIN</b></p> <p>Score <b>35.4</b> -0.1</p>
<p>86 ▲ 90</p>  <p><b>JAMAICA</b></p> <p>Score <b>35.3</b> +0.5</p>	<p>87 ▼ 80</p>  <p><b>KAZAKHSTAN</b></p> <p>Score <b>35.1</b> -0.8</p>	<p>88 ▼ 81</p>  <p><b>PAKISTAN</b></p> <p>Score <b>35.0</b> -0.6</p>	<p>89 ▼ 86</p>  <p><b>ECUADOR</b></p> <p>Score <b>35.0</b> -</p>	<p>90 ▼ 85</p>  <p><b>GHANA</b></p> <p>Score <b>34.8</b> -0.3</p>
<p>91 = 91</p>  <p><b>LEBANON</b></p> <p>Score <b>34.7</b> -0.1</p>	<p>92 ▲ 95</p>  <p><b>KENYA</b></p> <p>Score <b>34.4</b> -0.2</p>	<p>93 ▲ 106</p>  <p><b>ARMENIA</b></p> <p>Score <b>34.2</b> +0.7</p>	<p>94 ▲ 108</p>  <p><b>COTE D'IVOIRE</b></p> <p>Score <b>34.1</b> +0.9</p>	<p>95 ▼ 93</p>  <p><b>TANZANIA</b></p> <p>Score <b>34.0</b> -0.7</p>
<p>96 ▼ 89</p>  <p><b>VENEZUELA</b></p> <p>Score <b>33.7</b> -1.2</p>	<p>97 ▲ 98</p>  <p><b>SRI LANKA</b></p> <p>Score <b>33.6</b> -0.7</p>	<p>98 ▲ 99</p>  <p><b>IRAQ</b></p> <p>Score <b>33.6</b> -0.6</p>	<p>99 ▲ 101</p>  <p><b>UZBEKISTAN</b></p> <p>Score <b>33.6</b> -0.5</p>	<p>100 ▼ 92</p>  <p><b>ALBANIA</b></p> <p>Score <b>33.6</b> -1.1</p>

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<p><b>101</b> ▲ 105</p> <p><b>NEPAL</b></p> <p>Score <b>33.5</b> -0.3</p>	<p><b>102</b> ▼ 94</p> <p><b>SENEGAL</b></p> <p>Score <b>33.5</b> -1.1</p>	<p><b>103</b> ▼ 100</p> <p><b>BOLIVIA</b></p> <p>Score <b>33.4</b> -0.8</p>	<p><b>104</b> ▼ 96</p> <p><b>BANGLADESH</b></p> <p>Score <b>33.4</b> -1.2</p>	<p><b>105</b> ▼ 97</p> <p><b>MAURITIUS</b></p> <p>Score <b>33.3</b> -1.0</p>
<p><b>106</b> ▼ 103</p> <p><b>MADAGASCAR</b></p> <p>Score <b>32.8</b> -1.1</p>	<p><b>107</b> ▼ 102</p> <p><b>MONTENEGRO</b></p> <p>Score <b>32.6</b> -1.4</p>	<p><b>108</b> ▲ 122</p> <p><b>MONGOLIA</b></p> <p>Score <b>32.4</b> +0.4</p>	<p><b>109</b> ▼ 104</p> <p><b>RWANDA</b></p> <p>Score <b>32.3</b> -1.6</p>	<p><b>110</b> = 110</p> <p><b>CAMEROON</b></p> <p>Score <b>32.3</b> -0.9</p>
<p><b>111</b> ▲ 115</p> <p><b>ETHIOPIA</b></p> <p>Score <b>32.1</b> -0.6</p>	<p><b>112</b> ▼ 111</p> <p><b>BOSNIA AND HERZEGOVINA</b></p> <p>Score <b>32.1</b> -1.0</p>	<p><b>113</b> ▼ 112</p> <p><b>CAMBODIA</b></p> <p>Score <b>31.9</b> -0.9</p>	<p><b>114</b> ▲ 128</p> <p><b>ANDORRA</b></p> <p>Score <b>31.8</b> +0.4</p>	<p><b>115</b> ▼ 113</p> <p><b>ZAMBIA</b></p> <p>Score <b>31.6</b> -1.2</p>
<p><b>116</b> ▲ 119</p> <p><b>CENTRAL AFRICAN REPUBLIC</b></p> <p>Score <b>31.5</b> -0.9</p>	<p><b>117</b> ▲ 123</p> <p><b>BHUTAN</b></p> <p>Score <b>31.5</b> -0.2</p>	<p><b>118</b> ▼ 107</p> <p><b>BRUNEI DARUSSALAM</b></p> <p>Score <b>31.4</b> -1.9</p>	<p><b>119</b> ▼ 109</p> <p><b>NORTH MACEDONIA</b></p> <p>Score <b>31.3</b> -1.9</p>	<p><b>120</b> ▲ 126</p> <p><b>GUATEMALA</b></p> <p>Score <b>31.2</b> -0.3</p>
<p><b>121</b> = 121</p> <p><b>UGANDA</b></p> <p>Score <b>31.2</b> -0.8</p>	<p><b>122</b> ▲ 149</p> <p><b>YEMEN</b></p> <p>Score <b>31.0</b> +2.2</p>	<p><b>123</b> ▲ 133</p> <p><b>NAMIBIA</b></p> <p>Score <b>30.9</b> +0.4</p>	<p><b>124</b> ▼ 114</p> <p><b>DEMOCRATIC REPUBLIC OF THE CONGO</b></p> <p>Score <b>30.7</b> -2.1</p>	<p><b>125</b> ▲ 127</p> <p><b>ZIMBABWE</b></p> <p>Score <b>30.7</b> -0.8</p>

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<p><b>126</b> ▼ 118</p> <p><b>MOLDOVA</b></p> <p>Score <b>30.6</b> -1.8</p>	<p><b>127</b> ▲ 129</p> <p><b>SYRIA</b></p> <p>Score <b>30.5</b> -0.7</p>	<p><b>128</b> ▼ 116</p> <p><b>ANGOLA</b></p> <p>Score <b>30.4</b> -2.3</p>	<p><b>129</b> ▼ 125</p> <p><b>SAN MARINO</b></p> <p>Score <b>30.4</b> -1.1</p>	<p><b>130</b> ▲ 140</p> <p><b>MALI</b></p> <p>Score <b>30.4</b> +0.4</p>
<p><b>131</b> ▼ 120</p> <p><b>HONDURAS</b></p> <p>Score <b>30.3</b> -1.9</p>	<p><b>132</b> ▲ 135</p> <p><b>FIJI</b></p> <p>Score <b>30.2</b> -0.3</p>	<p><b>133</b> ▲ 139</p> <p><b>LIBYA</b></p> <p>Score <b>30.1</b> -</p>	<p><b>134</b> ▲ 138</p> <p><b>TURKMENISTAN</b></p> <p>Score <b>30.1</b> -0.1</p>	<p><b>135</b> ▲ 137</p> <p><b>BARBADOS</b></p> <p>Score <b>30.0</b> -0.2</p>
<p><b>136</b> ▼ 131</p> <p><b>LIBERIA</b></p> <p>Score <b>30.0</b> -0.8</p>	<p><b>137</b> ▼ 132</p> <p><b>MOZAMBIQUE</b></p> <p>Score <b>30.0</b> -0.8</p>	<p><b>138</b> ▲ 146</p> <p><b>CONGO</b></p> <p>Score <b>30.0</b> +0.8</p>	<p><b>139</b> ▲ 147</p> <p><b>BOTSWANA</b></p> <p>Score <b>29.8</b> +0.8</p>	<p><b>140</b> ▼ 130</p> <p><b>DOMINICA</b></p> <p>Score <b>29.7</b> -1.4</p>
<p><b>141</b> ▲ 145</p> <p><b>TAJIKISTAN</b></p> <p>Score <b>29.7</b> +0.3</p>	<p><b>142</b> ▼ 124</p> <p><b>SUDAN</b></p> <p>Score <b>29.6</b> -1.9</p>	<p><b>143</b> ▼ 134</p> <p><b>LAOS</b></p> <p>Score <b>29.4</b> -1.1</p>	<p><b>144</b> ▼ 143</p> <p><b>NIGER</b></p> <p>Score <b>29.3</b> -0.5</p>	<p><b>145</b> ▼ 142</p> <p><b>GUINEA</b></p> <p>Score <b>29.0</b> -0.9</p>
<p><b>146</b> ▲ 148</p> <p><b>KYRGYZSTAN</b></p> <p>Score <b>28.8</b> -0.2</p>	<p><b>147</b> ▼ 144</p> <p><b>SEYCHELLES</b></p> <p>Score <b>28.3</b> -1.2</p>	<p><b>148</b> ▲ 162</p> <p><b>NICARAGUA</b></p> <p>Score <b>28.0</b> +0.7</p>	<p><b>149</b> ▲ 151</p> <p><b>SOUTH SUDAN</b></p> <p>Score <b>27.9</b> -0.7</p>	<p><b>150</b> ▲ 153</p> <p><b>MAURITANIA</b></p> <p>Score <b>27.7</b> -0.8</p>

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<p><b>151</b> ▲</p> <p>154</p> <p><b>TRINIDAD AND TOBAGO</b></p> <hr/> <p>Score <b>27.6</b> -0.5</p>	<p><b>152</b> ▼</p> <p>136</p> <p><b>MYANMAR</b></p> <hr/> <p>Score <b>27.6</b> -2.7</p>	<p><b>153</b> ▼</p> <p>152</p> <p><b>AFGHANISTAN</b></p> <hr/> <p>Score <b>27.5</b> -1.1</p>	<p><b>154</b> ▲</p> <p>185</p> <p><b>ESWATINI</b></p> <hr/> <p>Score <b>27.4</b> +3.3</p>	<p><b>155</b> ▼</p> <p>150</p> <p><b>CAPE VERDE</b></p> <hr/> <p>Score <b>27.0</b> -1.6</p>
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<p><b>156</b> ▲</p> <p>158</p> <p><b>GAMBIA</b></p> <hr/> <p>Score <b>27.0</b> -0.7</p>	<p><b>157</b> ▼</p> <p>155</p> <p><b>GUYANA</b></p> <hr/> <p>Score <b>26.9</b> -1.1</p>	<p><b>158</b> ▲</p> <p>160</p> <p><b>MALAWI</b></p> <hr/> <p>Score <b>26.5</b> -1.0</p>	<p><b>159</b> ▼</p> <p>156</p> <p><b>PAPUA NEW GUINEA</b></p> <hr/> <p>Score <b>26.3</b> -1.6</p>	<p><b>160</b> ▲</p> <p>167</p> <p><b>GRENADA</b></p> <hr/> <p>Score <b>26.2</b> -0.7</p>
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<p><b>161</b> ▼</p> <p>159</p> <p><b>EQUATORIAL GUINEA</b></p> <hr/> <p>Score <b>26.2</b> -1.4</p>	<p><b>162</b> ▲</p> <p>163</p> <p><b>GUINEA-BISSAU</b></p> <hr/> <p>Score <b>25.9</b> -1.2</p>	<p><b>163</b> ▼</p> <p>141</p> <p><b>BENIN</b></p> <hr/> <p>Score <b>25.8</b> -4.1</p>	<p><b>164</b> ▲</p> <p>168</p> <p><b>GABON</b></p> <hr/> <p>Score <b>25.8</b> -1.0</p>	<p><b>165</b> ▼</p> <p>157</p> <p><b>TOGO</b></p> <hr/> <p>Score <b>25.6</b> -2.1</p>
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<p><b>166</b> ▼</p> <p>161</p> <p><b>BURKINA FASO</b></p> <hr/> <p>Score <b>25.4</b> -2.1</p>	<p><b>167</b> ▼</p> <p>164</p> <p><b>COMOROS</b></p> <hr/> <p>Score <b>25.3</b> -1.7</p>	<p><b>168</b> ▼</p> <p>166</p> <p><b>BELIZE</b></p> <hr/> <p>Score <b>25.3</b> -1.6</p>	<p><b>169</b> =</p> <p>169</p> <p><b>SIERRA LEONE</b></p> <hr/> <p>Score <b>25.2</b> -1.6</p>	<p><b>170</b> ▲</p> <p>171</p> <p><b>HAITI</b></p> <hr/> <p>Score <b>25.0</b> -1.6</p>
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<p><b>171</b> ▼</p> <p>170</p> <p><b>SAMOA</b></p> <hr/> <p>Score <b>25.0</b> -1.7</p>	<p><b>172</b> ▲</p> <p>174</p> <p><b>SÃO TOMÉ AND PRÍNCIPE</b></p> <hr/> <p>Score <b>24.7</b> -1.4</p>	<p><b>173</b> =</p> <p>173</p> <p><b>BURUNDI</b></p> <hr/> <p>Score <b>24.6</b> -1.6</p>	<p><b>174</b> ▲</p> <p>178</p> <p><b>ANTIGUA AND BARBUDA</b></p> <hr/> <p>Score <b>24.5</b> -1.0</p>	<p><b>175</b> ▲</p> <p>187</p> <p><b>SAINT VINCENT AND THE GRENADINES</b></p> <hr/> <p>Score <b>24.5</b> +0.7</p>
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<p><b>176</b> =</p> <p>176</p> <p><b>CHAD</b></p> <hr/> <p>Score <b>24.3</b> -1.4</p>	<p><b>177</b> ▲</p> <p>189</p> <p><b>DJIBOUTI</b></p> <hr/> <p>Score <b>24.2</b> +0.5</p>	<p><b>178</b> ▼</p> <p>172</p> <p><b>SAINT LUCIA</b></p> <hr/> <p>Score <b>23.9</b> -2.4</p>	<p><b>179</b> ▼</p> <p>165</p> <p><b>SOLOMON ISLANDS</b></p> <hr/> <p>Score <b>23.9</b> -3.0</p>	<p><b>180</b> ▼</p> <p>175</p> <p><b>TIMOR-LESTE</b></p> <hr/> <p>Score <b>23.5</b> -2.2</p>
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<p><b>181</b> ▼</p> <p>179</p> <p><b>SOMALIA</b></p> <hr/> <p>Score <b>23.5</b> -1.7</p>	<p><b>182</b> ▼</p> <p>181</p> <p><b>SURINAME</b></p> <hr/> <p>Score <b>23.3</b> -1.5</p>	<p><b>183</b> ▼</p> <p>177</p> <p><b>TONGA</b></p> <hr/> <p>Score <b>23.3</b> -2.2</p>	<p><b>184</b> ▼</p> <p>180</p> <p><b>LESOTHO</b></p> <hr/> <p>Score <b>23.1</b> -1.9</p>	<p><b>185</b> ▼</p> <p>184</p> <p><b>ERITREA</b></p> <hr/> <p>Score <b>22.8</b> -1.4</p>
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<p><b>186</b> ▲</p> <p>190</p> <p><b>SAINT KITTS AND NEVIS</b></p> <hr/> <p>Score <b>21.2</b> -2.1</p>	<p><b>187</b> ▼</p> <p>182</p> <p><b>MARSHALL ISLANDS</b></p> <hr/> <p>Score <b>20.8</b> -3.8</p>	<p><b>188</b> ▲</p> <p>192</p> <p><b>NAURU</b></p> <hr/> <p>Score <b>20.2</b> -2.4</p>	<p><b>189</b> ▼</p> <p>183</p> <p><b>PALAU</b></p> <hr/> <p>Score <b>20.1</b> -4.2</p>	<p><b>190</b> ▼</p> <p>188</p> <p><b>MICRONESIA</b></p> <hr/> <p>Score <b>20.1</b> -3.6</p>
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<p><b>191</b> ▼</p> <p>186</p> <p><b>TUVALU</b></p> <hr/> <p>Score <b>20.0</b> -3.9</p>	<p><b>192</b> ▼</p> <p>191</p> <p><b>VANUATU</b></p> <hr/> <p>Score <b>19.3</b> -3.9</p>	<p><b>193</b> =</p> <p>193</p> <p><b>KIRIBATI</b></p> <hr/> <p>Score <b>18.8</b> -3.1</p>
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01

# Methodology

# Understanding the Global Soft Power Index



**Kevin Woods**  
Head of Research,  
Brand Finance

In practical terms, Soft Power is the power of perceptions which can be leveraged by nations to strengthen security as well as attract investment, trade, talent, and tourism, and in effect improve economic growth.

## How is Soft Power measured?

The Global Soft Power Index evaluates Soft Power through:

### 1. Key Performance Indicators (KPIs)

- + **Familiarity**  
how well a nation is known.
- + **Reputation**  
how positively a nation is regarded.
- + **Influence**  
how much a nation is perceived to influence other nations.

## What is Soft Power?

Soft Power is a nation's ability to influence others through attraction and persuasion rather than coercion. This includes the means of culture, business, or diplomacy, rather than military force or economic sanctions.

## 8 Soft Power Pillars & 35 Nation Brand Attributes

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Business & Trade	International Relations	Education & Science	Culture & Heritage	Governance	Media & Communication	Sustainable Future	People & Values
Strong and stable economy	Influential in Diplomatic circles	Advanced technology and innovation	Influential in arts and entertainment	Internationally admired government leaders	Affairs I follow closely	Invests in green energy and technologies	Trustworthy
Products and brands the world loves	Helpful to countries in need	Advanced in science	Food the world loves	Politically stable and well-governed	Easy to communicate with	Sustainable cities and transport	Generous
Easy to do business in and with	Good relations with other countries	Strong educational system	Great place to visit	High ethical standards and low corruption	Influential media	Acts to protect the environment	Friendly
Future growth potential	-	Invests in space exploration	Leader in sports	Safe and secure	Trustworthy media	Supports global efforts to counter climate change	Fun
-	-	-	Appealing lifestyle	Respects law and human rights	-	-	Tolerant and inclusive
-	-	-	Rich heritage	-	-	-	-

## 2. Eight Soft Power pillars & 35 Nation Brand attributes

Equally important are perceptions of the nation brand across key areas where Soft Power is developed and exercised.

We use a comprehensive list of 35 Nation Brand Attributes divided between 8 Soft Power Pillars. A respondent-level statistical drivers analysis allows us to identify which Nation Brand Attributes are most important in shaping Reputation and Influence of nations and how perspectives differ between societies worldwide.

## 3. Recommendation measurement

The Global Soft Power Index survey also assesses a nation's ability to attract investment, trade, talent, and tourism. Understanding to what extent a country would be recommended as a place to invest, trade, work, study, or visit complements the Global Soft Power Index metrics by providing a direct link between Soft Power and Nation Brand Performance in key sectors.

## Evolution of the Global Soft Power Index

Now in its sixth year, the Global Soft Power Index has been appraised annually through expert consultation and data-driven analysis to ensure a robust and relevant measurement, while maintaining year-on-year comparability of results.

The Index framework was initially established with academic input from nation branding expert Dr Paul Temporal, University of Oxford, and through extensive consultation, involving qualitative interviews with over 50 practitioners and researchers of Soft Power worldwide and across several categories: academics, think-tank analysts, journalists, diplomats, nation brand managers, consultants, business leaders, artists, and sportspeople.

In the first two years, the survey covered the views of both the General Public and Specialist Audiences, such as market analysts, policymakers, and thought leaders. Given similar results across the two groups, since 2022, we have focused exclusively on the General Public, allowing for greater sample sizes and increased comparability across markets.



During the pandemic, the Index also temporarily included perceptions of national COVID-19 Response, assessing how nations navigated the global crisis. As the pandemic receded, this metric was discontinued to maintain long-term relevance of the Index.

### New features for 2025

+ **Russia reintroduced into survey coverage**

After pausing fieldwork in Russia for the 2023 and 2024 Index surveys, we have re-included the views of the Russian general public on nation brands in the 2025 survey. Undertaking opinion polling in Russia complements a holistic overview of nation brand perceptions accounting for all geographic perspectives, and provides a valuable insight into how perceptions of the outside world have changed

in Russia three years on from its aggression against Ukraine.

+ **Three Nation Brand Attributes updated**

To encourage a more accurate response and a more nuanced score distribution for attribute perceptions surrounding leadership, science, and technological innovation, we made slight tweaks to the wording of three attributes. Before introducing the change, we piloted the edits in three geographically and culturally distinct markets.

### Survey design

The Global Soft Power Index is the world's most comprehensive research study on perceptions of nation brands. Based on a global sample of 170,000+ respondents across 100+ markets, the Index ranks all 193 member states of the United Nations.

The Index measures international perceptions of nation brands. Participants' home nation perceptions are also captured and available but are not included in the Soft Power Score calculation.

### Data collection

+ **Total respondents: 173,602**

The main sample collection was conducted online between 19<sup>th</sup> September and 22<sup>nd</sup> November, with targeted market top-ups taking place from 25<sup>th</sup> November to 9<sup>th</sup> December 2024 to ensure robust global coverage and scores for all nation brands.

+ **Markets surveyed: 102**

Our sample is representative of the population of each of the 102 markets surveyed. Key markets with the largest populations and whose perspectives are of greatest interest to Index users (e.g. China,

United States, India etc.) were prioritised, with samples in excess of 3,000 respondents in each market. However, samples in all markets included at least 650 respondents, with 72 of the 102 markets surveyed having a sample of at least 1000.

+ **Nation brands assessed: 193**

Similarly, in order to manage respondent workload, key nation brands were prioritised to ensure a greater number of ratings from participants for a robust understanding of perceptions.

In action, this means that global powerhouses such as China, would have more exposure in the survey than a slightly smaller nation such as Ireland (i.e. nearly twice the number of ratings at the Nation Brand Attribute level within a market).

### Fieldwork approach

+ **Developed markets** - data collected via established online research panels (managed by Savanta).

+ **Emerging and hard-to-reach markets** - data collected using digital advertising-based sampling (managed by Bolt Insight).

+ **Quota controls - age, gender, and geographical region** - age, gender, and geographical region within each market to ensure representative samples.

### Survey questionnaire

Surveys were conducted in 54 languages to ensure accessibility across markets. Each respondent was asked about a random subset of the 193 nation brands in the Index:

+ **Familiarity:** Is the respondent unaware of, aware of, or familiar with this nation?

*KPI rated on a scale (from 'I've never heard of it' to 'I know it well')*

Only those respondents familiar with a given nation brand ('I know this country well' / 'I know this country a little') answer further perception questions in the survey:

+ **Reputation:** Overall, does the respondent rate the nation as having a positive or negative reputation? *KPI rated on a scale (0-10: 'Extremely negative' to 'Extremely positive')*

+ **Influence:** How influential does the respondent believe the nation to be in their country? *KPI rated on a scale (0-5: 'No influence at all' to 'Extremely influential')*

+ **35 Nation Brand Attributes across the 8 Soft Power Pillars:** Which attributes does the respondent associate with this nation? *Score dependent on the number of attribute selections by respondents in a given market (respondents can select all that in their opinion apply)*

Included in the survey, but not part of the calculated Soft Power Score:

+ **Recommendation:** How likely is a respondent to recommend the nation as a place to invest, work, study, visit, or purchase from? *KPI rated on a scale (0-5: 'Would not recommend at all' to 'Would definitely recommend')*

### Understanding the scores

Each nation receives a Soft Power Score, reflecting its perceptions across:

### Three Nation Brand Attributes Updated

Pillar	Old Wording	New Wording
Governance	<i>Internationally admired leaders</i>	<i>Internationally admired government leaders</i>
Education & Science	<i>Leader in science</i>	<i>Advanced in science</i>
Education & Science	<i>Leader in technology and innovation</i>	<i>Advanced technology and innovation</i>

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- + **Familiarity**
- + **Reputation**
- + **Influence**
- + **35 Nation Brand Attributes across the 8 Soft Power Pillars**

- + **Familiarity modifier**  
(markets with greater Familiarity with the nation brand account for a greater weight than others)

The metric weights are split equally between KPIs and Nation Brand Attributes, with each accounting for 50%:

Introduced in 2024, the Recommendation measures provide additional context when analysing nation brand results but are not included in calculating the Soft Power Score.

**Higher scores** = More international impact and stronger perceptions.

**Lower scores** = Less international impact and weaker perceptions.

### Weighting the scores

Each nation brand's Soft Power Score is determined by a balanced weighting system across both market and metric inputs.

The market inputs are weighted in a way that ensures global representation while accounting for real-world influence:

- + **50% – “one country, one vote” rule** (ensuring sovereign equality between all markets)
- + **50% – overall country population** (larger markets contribute proportionally more to global scores)

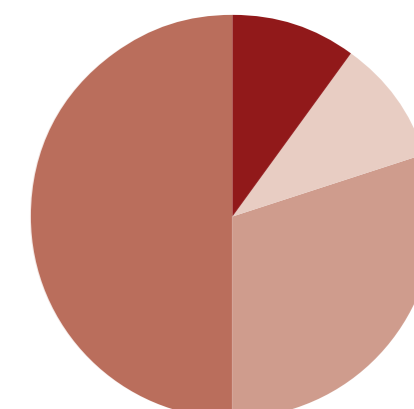
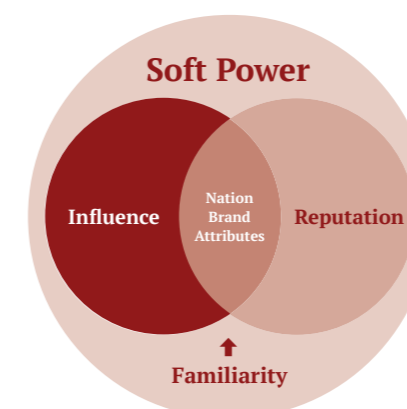
- + Among KPIs, Influence (30%) carries greater weight than Familiarity or Reputation (10% each), reflecting the action-oriented definition of Soft Power that we adopted, focused on its role in strengthening security and improving economic growth.

- + Weightings given to each attribute within the Index are based on statistical drivers analysis assessing the degree to which attribute perceptions impact Influence and Reputation. This is determined annually through regression analysis on respondent-level data across key global regions.

### Global Soft Power Index weightings

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- Familiarity
- Reputation
- Influence
- 8 Soft Power Pillars



# Survey Coverage

- Nation Brand and Market of Research
- Nation Brand Only - No Fieldwork

## Latin America & Caribbean

- Antigua and Barbuda
- Argentina
- Bahamas
- Barbados
- Belize
- Bolivia
- Brazil
- Chile
- Colombia
- Costa Rica
- Cuba
- Dominica
- Dominican Republic
- Ecuador
- El Salvador
- Grenada
- Guatemala
- Guyana
- Haiti
- Honduras
- Jamaica
- Mexico
- Nicaragua
- Panama
- Paraguay
- Peru
- Saint Kitts and Nevis
- Saint Lucia
- Saint Vincent and the Grenadines
- Suriname
- Trinidad and Tobago
- Uruguay
- Venezuela

## North America

- Canada
- United States

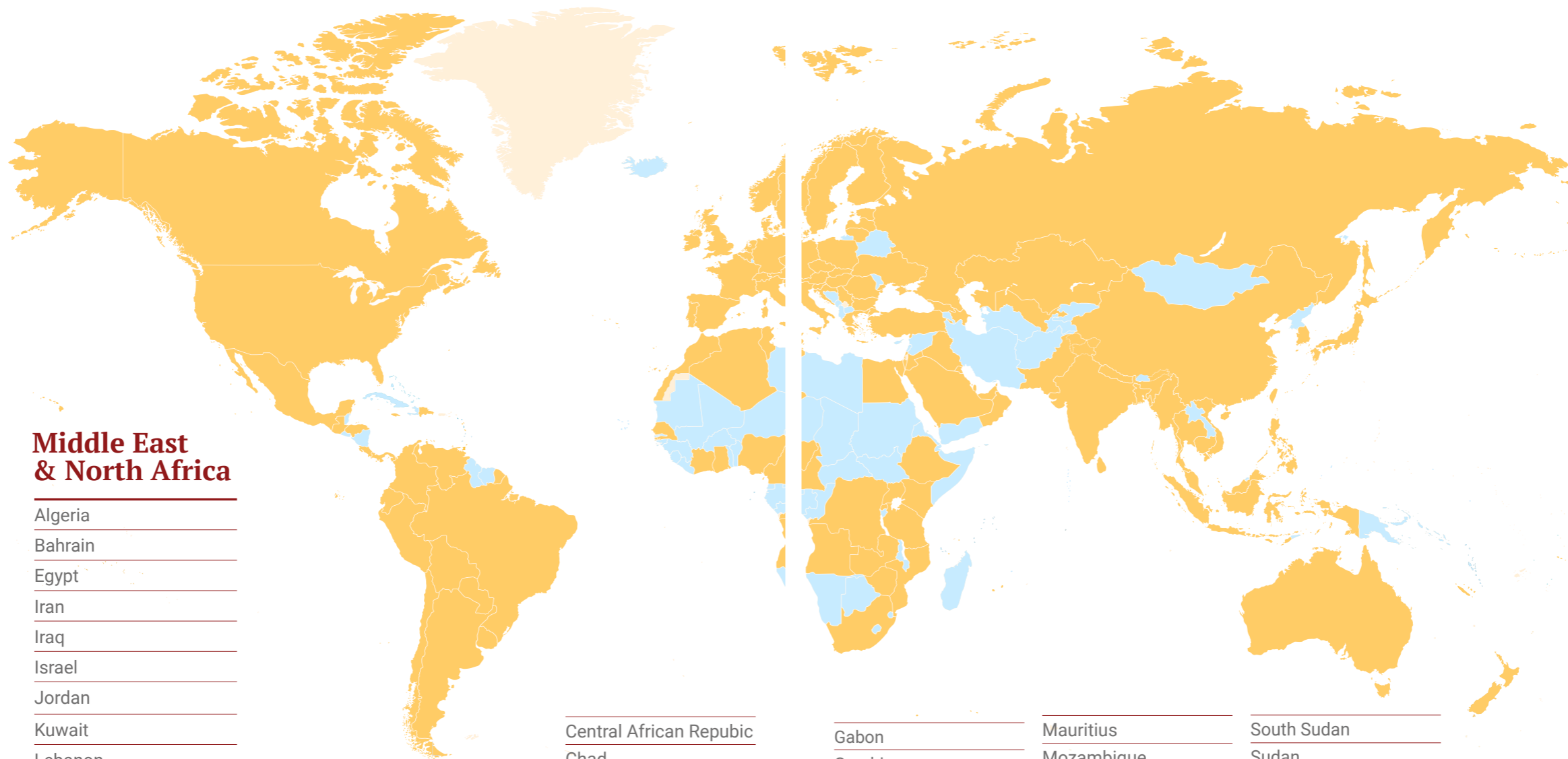
## Europe

- Albania
- Andorra
- Armenia
- Austria
- Azerbaijan
- Belarus
- Belgium
- Bosnia and Herzegovina
- Bulgaria
- Croatia
- Cyprus
- Czechia
- Denmark
- Estonia
- Finland
- France
- Georgia
- Germany
- Greece

- Hungary
- Iceland
- Ireland
- Italy
- Latvia
- Liechtenstein
- Lithuania
- Luxembourg
- Malta
- Moldova
- Monaco
- Montenegro
- Netherlands
- North Macedonia
- Norway
- Poland
- Portugal
- Romania
- Russia
- San Marino
- Serbia
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- Ukraine
- United Kingdom

## Asia

- Afghanistan
- Bangladesh
- Bhutan
- Brunei Darussalam
- Cambodia
- China
- India
- Indonesia
- Japan
- Kazakhstan
- Kyrgyzstan
- Laos
- Malaysia
- Maldives
- Mongolia
- Myanmar
- Nepal
- North Korea
- Pakistan
- Philippines
- Singapore
- South Korea
- Sri Lanka
- Tajikistan
- Thailand
- Timor-Leste
- Turkmenistan
- Uzbekistan
- Vietnam



## Middle East & North Africa

- Algeria
- Bahrain
- Egypt
- Iran
- Iraq
- Israel
- Jordan
- Kuwait
- Lebanon
- Libya
- Morocco
- Oman
- Qatar
- Saudi Arabia
- Syria
- Tunisia
- United Arab Emirates
- Yemen

## Sub-Saharan Africa

- Angola
- Benin
- Botswana
- Burkina Faso
- Burundi
- Cape Verde
- Cameroon
- Central African Republic
- Chad
- Comoros
- Congo
- Côte d'Ivoire
- Democratic Republic of the Congo
- Djibouti
- Equatorial Guinea
- Eritrea
- Eswatini
- Ethiopia

- Gabon
- Gambia
- Ghana
- Guinea
- Guinea-Bissau
- Kenya
- Lesotho
- Liberia
- Madagascar
- Malawi
- Mali
- Mauritania
- Mauritius
- Mozambique
- Namibia
- Niger
- Nigeria
- Rwanda
- São Tomé and Príncipe
- Senegal
- Seychelles
- Sierra Leone
- Somalia
- South Africa
- South Sudan
- Sudan
- Tanzania
- Togo
- Uganda
- Zambia
- Zimbabwe

## Oceania

- Australia
- Fiji
- Kiribati
- Marshall Islands
- Micronesia
- Nauru
- New Zealand
- Palau
- Papua New Guinea
- Samoa
- Solomon Islands
- Tonga
- Tuvalu
- Vanuatu



45 %

27 %

65 %

35 %

# 02

## In-Depth Analysis

01/07

02/07

03/07

04/07



# Global Soft Power Index Analysis



**Konrad Jagodzinski**  
Place Branding Director,  
Brand Finance

## The zero-sum game of Soft Power

The Global Soft Power Index 2025 offers a year-on-year measurement of all 193 member states of the United Nations, after expanding the scope last year. This like-for-like comparison reveals a growing divergence in Soft Power potential between nations, with stronger nations advancing faster while weaker ones fall further behind.

The data illustrates this divide: the top 10 nations saw an average score increase of +0.9 points, while the bottom 10 experienced a steep decline of -3.0 points.

The same is true across broader segments - the top 50 nations averaged a +0.5 increase, compared to a -1.6 drop among the bottom 50. Even within the top 100, scores rose by +0.3 on average, while the remaining 93 countries declined by -1.2, reflecting a widening gap where gains by leading nations often come at the expense of others.

While experts previously posited that all nation brands might experience a gradual score inflation over time, the data now suggests a zero-sum game, with winners and losers. The global public's capacity to develop familiarity with and admiration for nation brands seems finite, favouring prominent countries and those making deliberate efforts to stand out. Less familiar nations struggle to capture attention and affection in this highly competitive environment.

## Superpower at a crossroads

The United States maintains its position at the top of the Global Soft Power Index, scoring 79.5 out of 100. Again, it leads in Familiarity and Influence and ranks first in three of the eight Soft Power pillars: International Relations, Education & Science, and Media & Communications.

However, the nation's overall score has stagnated, likely due to internal political tensions and the polarising nature of the presidential campaign which was underway during the time of polling. Reflecting this turbulent context, Reputation has taken a hit, falling four positions to rank 15<sup>th</sup> globally.

There has also been a noticeable decline in key pillars that underpin Reputation, particularly Governance, which dropped four positions to 10<sup>th</sup>,

and People & Values, down 10 positions in the ranking to 36<sup>th</sup>.

For the third consecutive year, there has been a decrease in perceptions of 'political stability and good governance'. Other crucial attributes have declined, including 'high ethical standards and low corruption,' 'generosity,' 'trustworthiness,' and being 'safe and secure.' Notably, the US ranks 124<sup>th</sup> for being 'friendly,' pinpointing a significant weakness in its Soft Power profile.

With President Donald Trump returning to office, the country's global image may face further shifts in the coming years, adding an element of unpredictability to its Soft Power dominance and future trajectory.













## The sun rises in the East

China has climbed to second place in the Index with a score of 72.8 out of 100, achieving its highest position to date and surpassing the UK for the first time. This improvement can be attributed to strategic efforts to enhance its global image, including the Belt and Road infrastructure projects, a renewed focus on sustainable development, stronger product brands, and the country's reopening to visitors post-pandemic.

The nation's strong performance is reflected in statistically significant gains across six of the eight Soft Power pillars

## Global Soft Power Index Top 20

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	<b>1 =</b>	United States		<b>11 ▲</b>	Sweden
	<b>79.5</b>	78.8 +0.7		<b>60.3</b>	59.0 +1.3
	<b>2 ▲</b>	China		<b>12 ▲</b>	South Korea
	<b>72.8</b>	71.2 +1.6		<b>60.2</b>	58.0 +2.2
	<b>3 ▼</b>	United Kingdom		<b>13 ▼</b>	Spain
	<b>72.4</b>	71.8 +0.6		<b>59.7</b>	59.2 +0.5
	<b>4 =</b>	Japan		<b>14 ▼</b>	Australia
	<b>71.5</b>	70.6 +0.9		<b>59.6</b>	58.6 +1.0
	<b>5 =</b>	Germany		<b>15 ▼</b>	Netherlands
	<b>70.1</b>	69.8 +0.3		<b>58.7</b>	58.2 +0.5
	<b>6 =</b>	France		<b>16 =</b>	Russia
	<b>68.5</b>	67.3 +1.2		<b>58.1</b>	57.7 +0.4
	<b>7 =</b>	Canada		<b>17 =</b>	Norway
	<b>65.2</b>	64.4 +0.8		<b>56.8</b>	56.8 -
	<b>8 =</b>	Switzerland		<b>18 ▲</b>	Denmark
	<b>64.9</b>	62.9 +2.0		<b>56.5</b>	55.5 +1.0
	<b>9 =</b>	Italy		<b>19 ▲</b>	Belgium
	<b>62.4</b>	62.0 +0.4		<b>56.0</b>	55.2 +0.8
	<b>10 =</b>	United Arab Emirates		<b>20 ▼</b>	Saudi Arabia
	<b>60.4</b>	59.7 +0.7		<b>55.6</b>	56.0 -0.4



and improvements in 24 of 35 nation brand attributes.

China has addressed perceptual weaknesses, particularly in the country's People & Values, up 18 positions this year. Overall, five of the lowest-ranked attributes from the previous year show the most significant increases: 'generous' (+27 ranks), 'friendly' (+25 ranks), 'good relations with other countries' (+24 ranks), 'easy to communicate with' (+20 ranks), and 'fun' (+15 ranks). These efforts have helped bolster China's global perceptions.

However, further attention to enhancing its cultural appeal and social perceptions could provide additional momentum in building its Reputation, where the nation currently only ranks 27<sup>th</sup>, showing no improvement from 2024.

At the same time, the United Kingdom has fallen to third place for the first time since the pandemic, reflecting a period of stagnation in its nation brand perceptions.

While there have been no sharp declines in scores or rankings, the lack of substantial improvement across key pillars - particularly Business & Trade, falling one position to rank 6<sup>th</sup> globally, and Governance, now ranked 3<sup>rd</sup> - highlights the need for revitalisation. The UK must provide clearer and more consistent leadership on global issues to regain momentum.

Creating the UK Soft Power Council is a welcome step in bolstering Britain's potential as a global player.

### Shifting sands in the Middle East

In recent years, Middle Eastern nations have made strides in Soft Power. However, this growth appears to be losing momentum, with many of the region's countries experiencing a decline in their global rankings. The United Arab Emirates is the exception, retaining 10<sup>th</sup> position, buoyed by strong perceptions of Business and Trade, International Relations, and overall Influence.

The UAE is second globally for being 'easy to do business in and with,' reflecting its pro-business policies. It also ranks in the top 10 for other Business & Trade attributes, namely 'future growth potential' and 'strong and stable economy,' driven by fiscal strength, a favourable investment climate, and ongoing economic diversification.

However, others in the region are losing ground: Saudi Arabia has dropped two positions to 20<sup>th</sup>, and Qatar has fallen one spot to 22<sup>nd</sup>. A decline in the perceptions of Gulf countries is becoming evident among respondents from the Middle East, Africa, and Asia, who view the region less favourably than before. While most of these markets still hold

Gulf countries in high regard, overall scores have decreased, potentially reflecting a shift in sentiment. Africa and Asia are key demographics for the Gulf economies, as migrants from these regions form the backbone of the workforce, supporting sectors such as construction, hospitality, and domestic services and contributing significantly to economic growth and cultural diversity.

### K-popular like South Korea

South Korea has emerged as the fastest-improving nation among those ranked in the top 100 last year, moving up three places to 12<sup>th</sup> following a +2.2-point increase in its Soft Power score. This rise is underpinned by greater Familiarity and statistically significant gains across six of the eight pillars.

Attributes such as 'advanced technology and innovation' and 'advanced in science' highlight South Korea's cutting-edge achievements. At the same time, the global success of K-pop and acclaimed films and TV shows have strengthened its scores in arts, entertainment, and media, boosting its international profile.

South Korea has recently come under pressure after President Yoon Suk Yeol's declaration of martial law, which led to his impeachment and sparked an ongoing

constitutional crisis. While these events could raise concerns over trust and harm South Korea's global reputation, they may also strengthen its image, showcasing resilience as the nation swiftly overturned martial law and upheld its democratic institutions.

### El Salvador's meteoric rise

In comparison, El Salvador is the fastest-rising nation across the whole ranking, jumping 35 spots to 82<sup>nd</sup> following a +3.2-point increase in its Soft Power score. Under the transformative leadership of President Nayib Bukele, the country has been thrust into the global spotlight, gaining greater recognition. This has led to improvements across all eight Soft Power pillars.

Once notorious as one of the world's most violent nations, El Salvador is now perceived as much safer. This transformation is primarily attributed to President Bukele's decisive measures, including the Territorial Control Plan, which has drastically reduced gang violence and homicides.

These efforts are reflected in the country's progress in the Governance pillar, with improvements in being perceived as 'safe and secure' and 'politically stable and well-governed' with 'high ethical standards and low corruption.'

El Salvador has also advanced in Business & Trade, earning higher scores for its 'strong and stable economy,' 'easy to do business in and with,' and 'advanced in technology and innovation.' Though controversial, its 2021 decision to adopt Bitcoin as legal tender has driven economic growth, boosted tourism, and attracted foreign investment.

### Hard Power and Soft Power

Nations engaged in military conflicts continue to see declines in Soft Power scores. Israel has fallen to 33<sup>rd</sup> place - its lowest position to date. More than a year after the October 7 attack by Hamas on Israel and Israel's invasion of Gaza in response, the Israeli-Palestinian conflict continues to heavily impact the nation's global perceptions, evidenced by a sharp 42-place decline in Reputation to 121<sup>st</sup>. Tensions remain high, with the ceasefire deal fragile and President Trump's takeover plan for Gaza adding further division and uncertainty.

Ukraine faces ongoing struggles to maintain global support since Russia's full-scale invasion in February 2022.

This year, its overall score dropped by -1.0 point, causing a drop of two places to 46<sup>th</sup>. Three years on, perceptions of Ukraine's Soft Power have weakened, with Reputation plummeting 19 places to 95<sup>th</sup> - below Russia's 75<sup>th</sup> -

highlighting divided global views on the war. Governance has also declined, down 17 places to 77<sup>th</sup>, and Familiarity fell four spots to 20<sup>th</sup>, underscoring the difficulty of sustaining international attention and sympathy.

Russia holds its position at 16<sup>th</sup> in the Index despite facing widespread condemnation in Western countries for its aggression towards Ukraine. Its Reputation score remains relatively stable, bolstered by strong support from Eastern allies, underscoring the sharp regional divide in perceptions of Russia.

### The Russian point of view

After pausing fieldwork in Russia for the 2023 and 2024 Index surveys, we have re-included the views of the Russian general public on nation brands in the 2025 survey. Undertaking opinion polling in Russia complements a holistic overview of nation brand perceptions that accounts for all geographic perspectives. It provides valuable insight into how perceptions of the outside world have changed in Russia three years after its aggression against Ukraine.

Consequently, the Soft Power rankings of the nation brands that Russians are most familiar with - its neighbours - have been affected. Belarus (+7 to 80<sup>th</sup>), Azerbaijan (+3 to 81<sup>st</sup>), and Armenia (+13 to 93<sup>rd</sup>) have

risen, benefiting from their political and historical ties with Russia. In contrast, the Baltic states, Georgia (-5 to 59<sup>th</sup>) and Moldova (-8 to 126<sup>th</sup>), have seen declines, as their closer alignment with the West and resistance to Russian influence has led to more negative perceptions within Russia.

### A new chapter for Bangladesh

Bangladesh's decline from 96<sup>th</sup> to 104<sup>th</sup> in the ranking may be surprising, especially following the 2024 revolution that toppled Sheikh Hasina's authoritarian government, as many expected to see a new momentum behind the nation brand.

However, market differences are key in explaining this dynamic, with perceptions among Indian respondents dropping significantly. Due to its status as the world's most populous country, India's weight in the Index has had a notable impact.

One of the nation brands that punch much below their weight in Soft Power, Bangladesh finally has the opportunity to reshape its global perceptions and forge a stronger position on the world stage.



# The Global Soft Power Index Medal Table



**Jamie Hyman**  
Global Head of Communications,  
Brand Finance

We then add up the totals - think of this as the Global Soft Power Index equivalent of the famous Olympic medal tally every four years.

In 2025, Switzerland leads with 15 gold medals, followed by the United States with 12 golds. The United Kingdom, Japan, and Canada have comparable total medal counts, although their distribution between gold, silver, and bronze varies.

## Soft Power medal winners of 2025

### Switzerland – The pinnacle of Soft Power

With 15 gold medals, Switzerland embodies stability, ethical governance, and reputation. It leads in areas such as perceptions of a strong economy, political stability, safety, and trusted institutions.

Switzerland almost received a clean sweep across all 'recommendation' categories, where people recommend most to work, invest, visit and buy from. Switzerland came second only to the UK as a place recommended for study – a strong endorsement that the world's people recommend Switzerland.

### United States – A cultural and technological giant

The United States, with 12 gold medals, excels in cultural influence, media reach, and technological innovation. While trailing Switzerland in some Governance and Reputation metrics, the U.S. remains a leader in global awareness and influence,

As we enter 2025, the Global Soft Power Index (GPSI) continues to measure the shifting and dynamic influence of nations, driven by their leaders, cultures and global politics.

From governance to cultural heritage, nations strive to project influence, adapt to global challenges, and reshape perceptions of their global standing. As globalisation is on the decline, data that informs these perceptions is increasingly vital.

The GSPI ranks all 193 member countries of the United Nations across a whole series of dimensions – and ranks which countries exert the most Soft Power influence.

Naturally, big nations rank highly, because their size increases their influence. However, as in previous years, Brand Finance recognises each country's performance across each dimension of the GSPI and awards metaphorical "medals" for the top three performances in each category.

## Recommendation

			Metrics
			<b>Recommendation</b>
			<i>Recommendation to invest in</i>
			<i>Recommendation to buy products and services from</i>
			<i>Recommendation to work in</i>
			<i>Recommendation to study in</i>
			<i>Recommendation to visit</i>

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## Soft Power Medal Winners 2025

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Pillars				Metrics
				<b>Global Soft Power Index</b>
				Awareness
				Familiarity
				Reputation
				Influence
				<b>Net Positive/Negative Impact</b>
				Business & Trade
				Strong and stable economy
				Products and brands the world loves
				Easy to do business in and with
				<b>Future growth potential</b>
				International Relations
				Influential in diplomatic circles
				Helpful to countries in need
				Good relations with other countries
				<b>Education &amp; Science</b>
				Advanced in technology and innovation
				Advanced in science
				Strong educational system
				Invests in space exploration
				<b>Culture &amp; Heritage</b>
				Influential in arts and entertainment
				Food the world loves
				Great place to visit
				Leader in sports
				<b>Governance</b>
				Internationally admired government leaders
				Politically stable and well-governed
				High ethical standards and low corruption
				Safe and secure
				<b>Media &amp; Communication</b>
				Affairs I follow closely
				Easy to communicate with
				Influential media
				Trustworthy media
				<b>Sustainable Future</b>
				Invests in green energy and technologies
				Sustainable cities and transport
				Acts to protect the environment
				Supports global efforts to counter climate change
				<b>People &amp; Values</b>
				Trustworthy
				Generous
				Friendly
				Fun
				Tolerant and inclusive



driven by its dominance in entertainment, growth potential, and space exploration.

**United Kingdom – Diplomatic and cultural strength**

The UK’s diverse medal tally (five gold, four silver, five bronze) highlights its multifaceted appeal. It excels in heritage, arts, and sports while maintaining influence through its diplomatic networks. Its strong educational system and global tourism appeal bolster its continued relevance.

**Japan – Tradition meets innovation**

Japan ranks equally with the UK and Canada in total medals but secures four golds in key areas of sustainability, advanced technology and high ethical standards. Technological advancements, heritage sites, and efficient urban infrastructure contribute to its strong Soft Power performance.

**Canada – A beacon of trust and safety**

Canada’s Soft Power is built on inclusivity, safety, and human rights. Its 14 medals (two gold, five silver, seven bronze) focus on diplomacy, education, and sustainable development. Known for friendliness and tolerance, Canada attracts immigrants and global businesses seeking stability and ethical governance.

**China, Italy and Brazil are in the next tier**

China, Italy, and Brazil each topped two categories. China ranked highest for global perceptions of ‘future growth potential’ and ‘ease of doing business.’ Italy won the food and friendliness categories, while Brazil won for sports and fun. These results reflect a data-based measurement of the global perceptions of each nation rather than an objective determination of each category.

**The Soft Power Medal Table 2025**

Rank	Country	🏆	🥈	🥉	Total
1.		15	3	1	19
2.		12	1	2	15
3.		5	4	5	14
4.		4	8	2	14
5.		2	5	7	14
6.		2	4	3	9
7.		2	3	2	7
8.		2	-	-	2
9.		1	-	-	1
10.		-	5	5	10
11.		-	3	5	8
12.		-	3	3	6
13.		-	1	2	3
14.		-	1	1	2
15.		-	1	1	2
16.		-	1	-	1
17.		-	1	-	1
18.		-	1	-	1
19.		-	-	2	2
20.		-	-	1	1
21.		-	-	1	1

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# From strength to strength: How China overtook the UK in Soft Power in 2025



**David Haigh**  
Chairman,  
Brand Finance

2025 is a big year for China's nation brand. China is now the second-most powerful nation in the world in terms of Soft Power, surpassing the United Kingdom and second only to the U.S. China's second-place spot in the ranking is its highest performance since Brand Finance began researching perceptions of nation brands.

Their ascent is not due to luck; China has made deliberate and multifaceted efforts to address weaknesses in how the country is perceived. The data indicates the strategy is working, as China's Reputation has climbed to 27<sup>th</sup> rank, up from 56<sup>th</sup> in 2021.

In the past year, China's nation brand has experienced notable growth across six of eight Soft Power pillars and in two-thirds of measured attributes. This growth highlights how improved perceptions across a range of economic, cultural, and social metrics are driving China's Soft Power.

In the meantime, the United Kingdom has stumbled. The UK is now ranked third in the Global Soft Power Index for the first time since the pandemic. While its scores and ranks have remained relatively stable year-on-year, there is a noticeable plateau in perceptions of its nation brand. Unlike China's dynamic upward trajectory, the latest data indicates the UK may be losing momentum in shaping its global image. (Figure 1)

## China's growing economic influence: Outpacing the UK in global business and trade?

Brand Finance research highlights that *Business & Trade* attributes are key indicators of a nation's global influence, reflecting economic strength, innovation, and integration into the worldwide market.

Since Brand Finance began measuring the nation's Soft Power in 2020, China has consistently outperformed the UK in the *Business & Trade* pillar. China has held the top spot globally for 'ease of doing business since' 2020, while the UK's highest rank for this attribute was sixth in 2023.

In 2025, the UK has slipped to eighth place, now trailing significantly behind China. This growing gap reflects China's sustained efforts to enhance its economic attractiveness and attract foreign investment, while the UK is struggling to stay competitive.

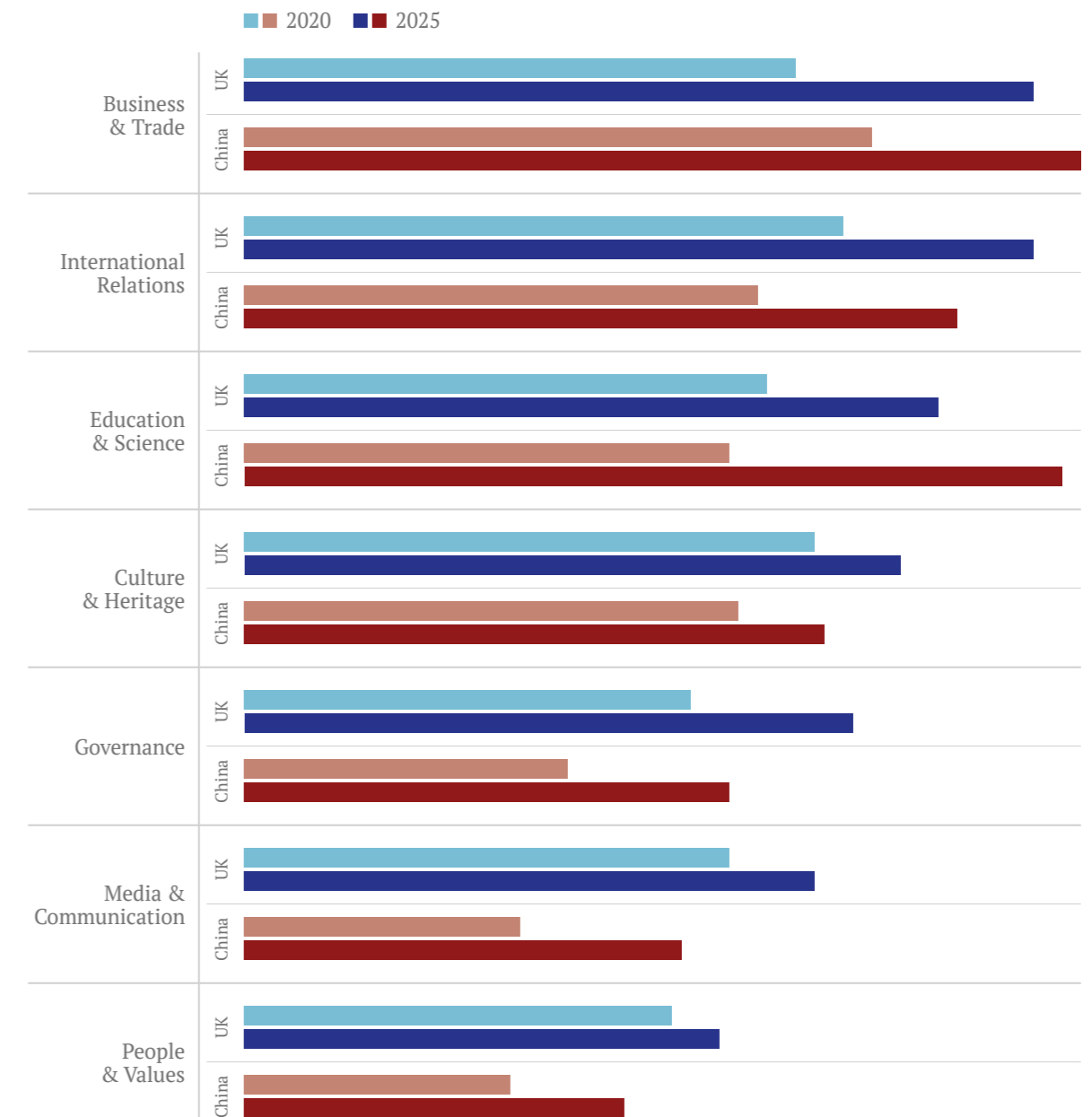
In the 2025 Index, China ranks eighth for its 'strong and stable economy,' narrowly ahead of the UK, which holds the ninth spot, a drop of two ranks from 2024. This shift reflects China's growing economic influence and ability to shape global economic stability perceptions. China has also ranked first for its 'future growth potential' since 2022, while the UK, which reached a concerningly low 86<sup>th</sup> in 2023, is struggling to keep up with China's high growth, improving only to 37<sup>th</sup> place in 2025.

For the UK, this concerning stagnation highlights a need to reassess its strategies for maintaining economic relevance, especially as it continues to navigate post-Brexit realities, evolving trade dynamics, and domestic pressures. Staying competitive in this crucial pillar of Soft Power will require a renewed focus on innovation, trade relationships, and economic diplomacy.

Positive perceptions of China's economic growth potential can be largely attributed to initiatives like the Belt and Road Initiative (BRI).

Comparing Pillar Scores: China vs. UK (Figure 1)

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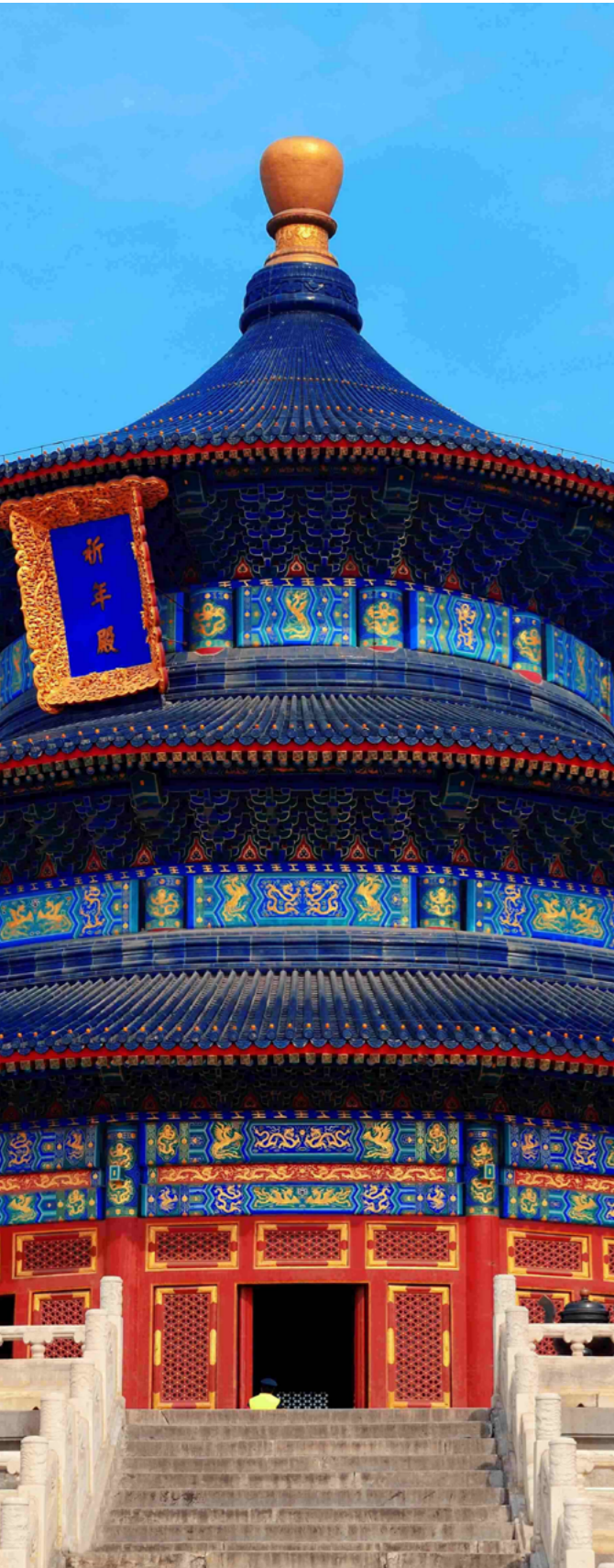


The BRI has played a pivotal role in creating new markets for Chinese companies and strengthening economic ties with participating countries. By building infrastructure, enhancing trade routes, and fostering international partnerships, the BRI has positioned China as a key driver of global connectivity.

In terms of Soft Power, a nation's ability to engage in trade, attract investment, and contribute to global economic development

is instrumental in shaping perceptions and enhancing its standing on the world stage.

China's strategic use of initiatives like the BRI has bolstered its economic strength and reinforced its image as a collaborative partner in international development, reflected in a 24-rank jump for its 'good relations with other countries.' The UK, meanwhile, remains in 18<sup>th</sup> place for this attribute, showing no improvement from 2024.



### The rise of Chinese brands: From domestic giants to global powerhouses

China's strategic investments in brand building have significantly enhanced the recognition and influence of its brands globally, contributing to the nation's growing Soft Power. In 2025, China ranks fifth globally for its 'products and brands the world loves', while the UK has remained in seventh position since 2021, signalling stagnation in this area. China's rise in this attribute is largely due to the growing recognition and performance of Chinese brands domestically and globally. Over the past 17 years, the number of Chinese brands in the Brand Finance Global 500 has surged from 13 to 68, and their total brand value has increased by more than 23-fold to USD1.4 trillion. (Figure 2)

This jump in brand value reflects a shift from domestic dominance to global brand leadership, exemplified by the worldwide impact of Chinese brands like TikTok. With over 1 billion monthly users, TikTok has transformed the global media landscape, reshaping how people create, consume and share content on a massive scale.

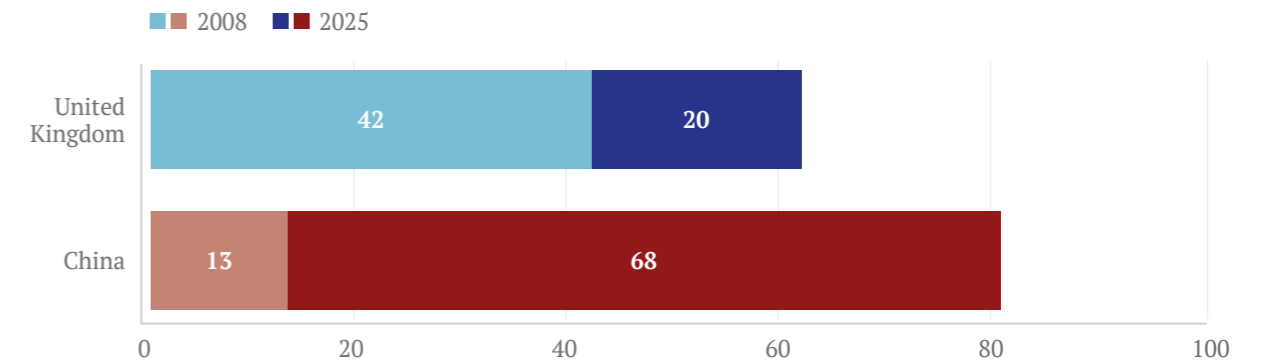
Its global influence has likely contributed to China's improved performance in the *Media & Communication* pillar, climbing 20 ranks for being perceived as 'easy to communicate with,' and 13 ranks for having 'trustworthy media.'

Chinese brands are also at the forefront of global innovation, with China maintaining its position as second in the world for being 'advanced in technology and innovation' over the past three years, ahead of the UK in sixth rank.

This progress is powered by the rise of tech giants like Huawei, a leader in global telecommunications, and BYD, which is driving the rapid global shift toward electric vehicles. These advancements reflect China's growing authority in innovative and high-tech industries and cement the global impact of Chinese brands.

Number of Brands in Global 500: China vs UK | 2008 & 2025 (Figure 2)

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Another standout example is the State Grid Corporation of China (SGCC), which has emerged as a global leader through its pivotal role in the BRI. By developing and operating critical energy infrastructure projects across participating countries, SGCC has not only strengthened China's energy diplomacy but also bolstered its brand as a leader in energy innovation and sustainable development.

Reflecting this success, SGCC entered the top 10 most valuable global brands list in the Global 500 for the first time ever in 2025, following a 20% increase in its brand value to USD85.6 billion. This milestone underscores the company's growing influence and impact of its strategic initiatives on the global stage.

### Advancements in Culture and People & Values driving China's Soft Power

China has made advancements in the *People & Values* pillar, recording rank increases across several attributes. This has contributed to its overall Reputation and nation brand perceptions. For example, China has risen 27 ranks for being perceived as 'generous', 25 ranks for being 'friendly', 15 ranks for being 'fun,' and 12 ranks for being 'trustworthy.' Meanwhile, the UK has experienced a standstill or decline in most these attributes since 2024, highlighting China's growing persuasion in this domain.

China has also risen six ranks for being considered as a 'great place to visit,' and seven ranks for its 'appealing lifestyle.'

These gains have helped China rise to seventh place in the Culture & Heritage pillar, narrowing the gap with the UK, which now holds a one-rank lead, down from three in 2024.

China's advancements in Culture & Heritage are closely aligned with the nation's broader Soft Power strategy, as outlined in its 14<sup>th</sup> Five-Year Plan (2021-2025), which emphasises strengthening its cultural influence and cultivating a positive national image abroad.

This strategic focus is expected to further enhance China's Soft Power in the coming years, while the UK will need to take proactive steps to maintain its competitiveness on the global stage. Creating the UK Soft Power Council is a welcome step in bolstering Britain's potential as a global player.

# The zero-sum game of Soft Power



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Soft Power has a strong, positive association with nation brand performance across key economic segments.

Our analysis shows that the Global Soft Power Index results correlate closely with major drivers of economic growth. In particular, 60% of changes in both trade exports and student movements correlate with variations in the Global Soft Power Index, while 47% of tourism receipts and 34% foreign direct investment inflows follow the same pattern. These findings suggest that a nation's ability to project its brand strengthens its economic and strategic interests over time. The Global Soft Power Index serves as a valuable measure of this capacity.

Failing to build Soft Power risks marginalisation on the global stage, leading to diminished influence and economic opportunity. In contrast, those who invest in it secure both short-term competitive advantages and long-term stability.

## The divergence of Soft Power potentials

Analysis of this year's Global Soft Power Index data challenges the assumption, posited by some commentators in the field, that there would be a universal inflation of nation brand perception scores over time. Instead, the 2025 results suggest that Soft Power operates as a competitive field, with finite space for nations to capture the global public's attention and admiration.

The result is a zero-sum game, with winners and losers. It coincides with a new era in international relations, where competition is becoming more brutal, where interests are made clear and pursued with determination, and where there is less and less regard for rules and conventions.

+ The average increase in the overall Soft Power score among the top 10 nations is +0.9, whereas the bottom 10 saw an average decline of -3.0.

The latest Global Soft Power Index 2025 results paint a vivid picture of a world where stronger nations continue solidifying their positions while weaker ones struggle to keep pace. This divergence underscores an increasingly competitive global environment for Soft Power, where gains are not uniformly distributed but instead reflect a zero-sum game.

## Why does Soft Power matter?

Soft Power is the power of brand perceptions which can be leveraged by nations for their own benefit. It is essential for long-term success in an increasingly competitive world. It underpins security by fostering strong alliances and networks of influence—critical in times of crisis. For example, Ukraine's global support and South Korea's strategic partnerships are built on Soft Power, enhancing both nations' security and resilience.

Moreover, Soft Power can serve as a shield against purely transactional international relations. In a world where trust and reputation often dictate success, nations with high Soft Power are better positioned to attract foreign investment, increase trade, and draw in top talent and tourism.

## Top 10

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Rank 2025	Nation Brand	Score 2025	Change	Score 2024
1	United States	79.5	+0.7	78.8
2	China	72.8	+1.6	71.2
3	United Kingdom	72.4	+0.6	71.8
4	Japan	71.5	+0.9	70.6
5	Germany	70.1	+0.3	69.8
6	France	68.5	+1.2	67.3
7	Canada	65.2	+0.8	64.4
8	Switzerland	64.9	+2.0	62.9
9	Italy	62.4	+0.4	62.0
10	United Arab Emirates	60.4	+0.7	59.7

## Bottom 10

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Rank 2025	Nation Brand	Score 2025	Change	Score 2024
184	Lesotho	23.1	-1.9	25.0
185	Eritrea	22.8	-1.4	24.2
186	Saint Kitts and Nevis	21.2	-2.1	23.3
187	Marshall Islands	20.8	-3.8	24.6
188	Nauru	20.2	-2.4	22.6
189	Palau	20.1	-4.2	24.3
190	Micronesia	20.1	-3.6	23.7
191	Tuvalu	20.0	-3.9	23.9
192	Vanuatu	19.3	-3.9	23.2
193	Kiribati	18.8	-3.1	21.9

+ Across the top 50, the average gain was +0.5, compared to a -1.6 average loss for the bottom 50.

+ Looking at the top 100, the average increase was +0.3, while the bottom 93 nations experienced an average decline of -1.2.

## Saliency as a Soft Power driver

The results highlight that Soft Power success is increasingly tied to saliency. Larger nations and those investing consciously in elevating their global image have reaped rewards. For instance, China's jump to second place has not only been





caused by their size, but through very deliberate efforts, such as the Belt and Road Initiative. Elsewhere, South Korea is a geographically small nation but offers high-profile technological and cultural exports, supported by its government across international markets.

Similarly, El Salvador is this year's fastest-growing nation in the Global Soft Power Index as a result of their controversial but determined leader with a clear vision to progress the nation's interests.

Conversely, less salient nations - and those paying little attention to nation branding - struggle to maintain familiarity and favourability among international audiences. Without a deliberate strategy to stand out, these countries risk losing in this global Soft Power competition and slipping further down the rankings.

### The start of a trend?

Recognising that these results represent a snapshot in time and that this year's findings do not necessarily establish a long-term trend is important. However, the scale of polarisation observed in 2025 raises critical questions for future analysis:

- + Will the gap between strong and weak Soft Power nations continue to widen?
- + Is there a limit to the global audience's capacity to engage with and embrace multiple nation brands?
- + How can less salient nations carve out space in an increasingly crowded field?
- + Can the same be inferred for region and city brands?

### Implications for nation branding

For place branding professionals, the 2025 results offer valuable insights:

- + **Investing in visibility:** Familiarity remains a prerequisite for favourability. Without sustained efforts to improve visibility, even countries with strong attributes may fail to gain traction.
- + **Strategic prioritisation:** Smaller nations can enter the competition by focusing on niche areas and key markets where they can excel, rather than attempting to compete across all Soft Power metrics and all of the world's geographies.
- + **Collaborative opportunities:** Partnerships with more prominent nations or institutions can allow smaller players to amplify their presence. Environmental activities are a clear opportunity, with a great example in Small Island Developing States working together to advocate for bolder climate action.

The Global Soft Power Index 2025 reinforces the reality that Soft Power is not evenly distributed. It is a competitive, dynamic space where strategic focus, sustained investment, and popular relevance make a difference.

As we look ahead to 2026, it will be fascinating to observe whether the divergence trends deepen or if a new equilibrium emerges.

# From destination to influence: How tourism shapes national reputation and global appeal



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Tourism is more than a leisure activity. How a country is perceived as a place to visit and how desirable a nation as a destination plays a critical role in shaping national reputation and fostering Soft Power.

challenging, a 'great place to visit' serves as an essential conduit for enhancing Familiarity, reinforcing cultural prestige, and stimulating economic engagement. It is one of the 35 attributes measured in the Brand Finance Global Soft Power Index, sitting under the Culture & Heritage pillar, highlighting its role in shaping a nation's overall appeal through tourism.

Empirical evidence demonstrates a strong correlation between positive tourism perception and key dimensions of national Reputation, economic attractiveness, and cultural appeal. In a globally competitive landscape, where differentiation is increasingly

The significance of a nation's perception as a travel destination is evident in its measurable impact on various aspects of national

## Great place to visit correlations

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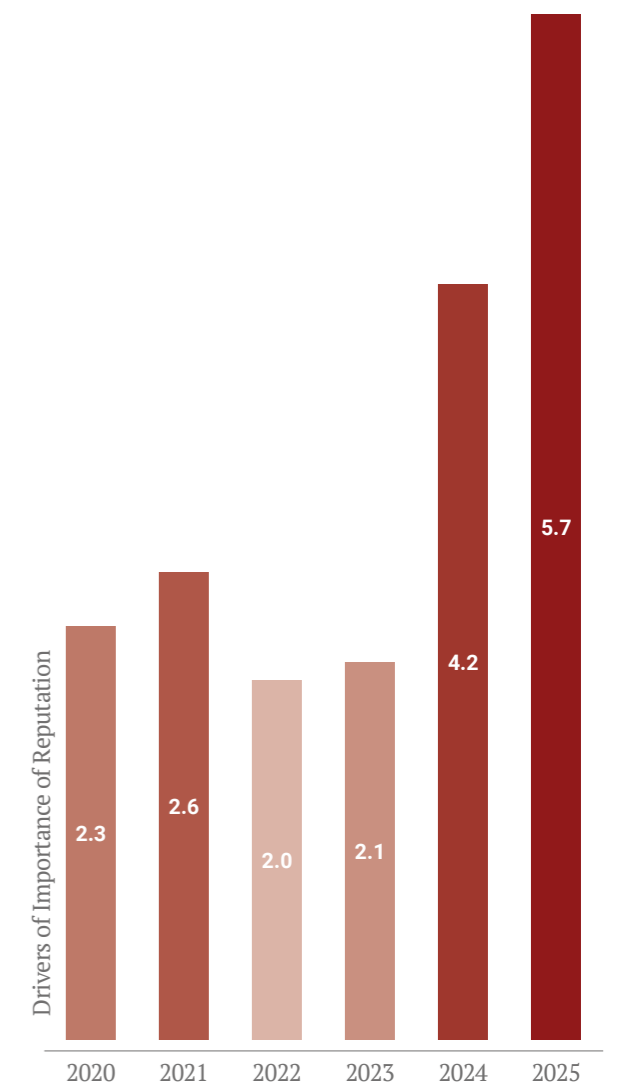
attractiveness. Reputation correlates with the 'great place to visit' attribute at a rate of 92%, highlighting the close relationship between global regard and appeal as a destination. Furthermore, correlation between 'great place to visit' and Recommendation to visit unsurprisingly holds at 98%.

However, what is more surprising is its high correlation rates for the other Recommendation dimensions: working 93%, purchasing products and services 93%, studying 91%, and investing 92%, which reinforces the broad impact of tourism appeal.

Beyond serving as a nation's first point of contact with the global public, tourism has increasingly become a strategic asset for economic and reputational growth. A strong travel appeal does more than shape initial perceptions—it signals openness, cultural richness, and economic opportunity, making a country more attractive for investment, talent mobility, and global partnerships. Over the past five years, the importance of being perceived as a desirable travel destination has risen dramatically, progressing from the 17<sup>th</sup> most significant determinant of Reputation in 2020 to the 2<sup>nd</sup> most influential factor in 2025, surpassed only by 'strong and stable economy'. This upward trajectory reflects not just the power of first impressions but also the growing recognition of tourism's role in driving long-term economic growth, strengthening international influence, and enhancing a nation's competitive standing.

## Growing importance of Great Place to Visit

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Beyond shaping overall Reputation, tourism plays a direct role in influencing the likelihood of people recommending a country to others. Tourism is frequently a nation's initial point of contact with the global public. Cultural richness, natural beauty, and hospitality contribute significantly to the formation of first impressions. The advent of social media and digital communication has further amplified this effect, transforming individual visitor experiences into widely disseminated narratives that influence broader public perceptions.

Tourism-driven recommendation extends beyond leisure into work and study considerations. The correlation between positive tourism perception and the attractiveness of a country as a work destination stands at 93%.

Economic opportunity is an essential factor in work migration, yet quality of life, cultural offerings, and recreational amenities also influence decision-making. Many of the world's leading work destinations are also prominent tourist hubs, with Switzerland ranking at the top of both categories. While academic prestige remains a primary factor in international study choices, the surrounding cultural environment is increasingly influential. With a correlation of 91% between tourism perception and recommendation to study, there is clear evidence that a country's cultural vibrancy, safety, and overall appeal weigh significantly in decision-making for prospective students.

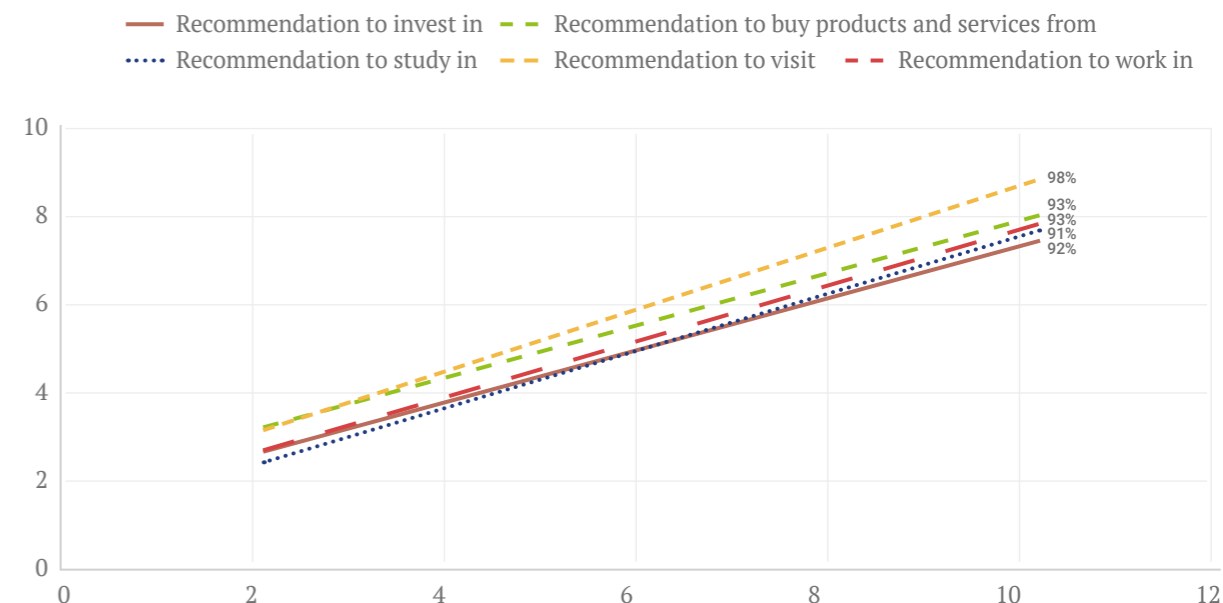
Consumer confidence is similarly affected by tourism, as are investment decisions.

The recommendation of a country's products and services is 93% correlated with tourism perceptions, an indicator that first-hand exposure drives global consumer trust. Visitors who associate a destination with quality, craftsmanship, and innovation are more likely to develop loyalty to its brands.

Japan exemplifies this relationship, experiencing an increase in both a 'great place to visit' perception and recommendation for their products and services.

### Great Place to Visit vs Recommendation dimensions

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Investment decisions are primarily determined by macroeconomic stability, but the 92% correlation between a country's desirability as a travel destination and its attractiveness for investment suggests that exposure to infrastructure, ease of doing business, and quality of life contribute to economic engagement. Investors often rely on personal familiarity with a nation before committing resources, making tourism an indirect but vital component of economic strategy.

According to the UN World Tourism Barometer, international travel essentially recovered to pre-pandemic levels in 2024, with most destinations exceeding 2019 numbers. This growth is expected to continue, with the UN predicting that international tourist arrivals will grow 3% to 5% in 2025. Of course, increased travel drives competitiveness in the tourism industry, which further accentuates the necessity of maintaining a strong national brand. More than 100 countries in the Global Soft Power Index now receive high perception scores above 5 out of 10, underscoring the increasing standard for tourism excellence. Given these rising expectations, differentiation through cultural authenticity, unique heritage, and high-quality experiences is now imperative for nations seeking to strengthen their international standing.

Tourism's influence extends beyond economic advantages, directly contributing to a nation's Soft Power, defined as the ability to influence the preferences and behaviours via cultural and reputational appeal rather than coercion. By showcasing its values, heritage, and hospitality, a nation strengthens its international image, reinforcing long-term diplomatic and cultural engagement. However, while tourism is an essential element of Reputation, it must be supported by broader economic and structural stability to be fully effective as a Soft Power tool.

Amid intensified competition for talent, investment, and economic engagement, tourism serves as a critical mechanism for national reputation-building. Its impact extends beyond short-term economic benefits, fostering sustained global awareness, trust, and positive sentiment. While economic stability remains the backbone of a nation's appeal, tourism provides the crucial first encounter that shapes global perceptions and invites long-term engagement.

By prioritising tourism as an instrument of Soft Power, nations can secure a stronger foothold in the global consciousness, reinforcing their position as hubs of culture, commerce, and innovation.

# Sustainability's contribution to Soft Power



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The actions a nation chooses to take (or doesn't) on topics like climate change, social inequality, and overseeing digital transformation are a key part of what shapes its Soft Power.

Brand Finance's Global Soft Power Index captures this link with the Sustainable Future pillar, which evaluates nation brands on four key aspects of environmental sustainability: cities and transport, support for global action on climate change, green energy and technologies, and environmental protection.

Once again, we observe a strong correlation between a nation's performance in the

Sustainable Future pillar and its Reputation score, at  $r=0.90$ . We also find a correlation of  $r=0.97$  between a nation's Sustainable Future pillar score and influence in Business and Trade, and a correlation of  $r=0.92$  with strength in International Relations.

Sustainability goes beyond environmental concerns to encompass social and governance factors, too. In total, 12 attributes which contribute to sustainability (Table 1), are responsible for driving 37% of a nation's Reputation in the 2025 Index according to regression analysis.

## Sustainability-related Soft Power attributes (Table 1)

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<i>Environmental</i>	<i>Acts to protect the environment</i>
	<i>Invests in green energy and technologies</i>
	<i>Supports global efforts to counter climate change</i>
	<i>Sustainable cities and transport</i>
<i>Social</i>	<i>A strong and stable economy</i>
	<i>Helpful to other countries in need</i>
	<i>Strong educational system</i>
	<i>Tolerant and inclusive</i>
<i>Governance</i>	<i>Respects law and human rights</i>
	<i>High ethical standards and low corruption</i>
	<i>Politically stable &amp; well-governed</i>
	<i>Trustworthy media</i>

## Leaders in sustainability attributes (Table 2)

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			<b>Metrics</b>
			<i>Acts to protect the environment</i>
			<i>Invests in green energy and technologies</i>
			<i>Supports global efforts to counter climate change</i>
			<i>Sustainable cities and transport</i>
			<i>A strong and stable economy</i>
			<i>Helpful to countries in need</i>
			<i>Strong educational system</i>
			<i>Tolerant and inclusive</i>
			<i>Respects law and human rights</i>
			<i>High ethical standards and low corruption</i>
			<i>Politically stable &amp; well-governed</i>
			<i>Trustworthy media</i>

## Sustainability perceptions leaders

Nordic nations and Western Europe feature heavily in the rankings on sustainability attributes, along with Japan, Canada, the United States, and the United Kingdom (Table 2).

## Mapping perceptions against sustainability performance

A strong reputation for sustainability is not always matched by real action. For example, the nations listed above that have the strongest sustainability perceptions have disproportionately high carbon emissions

relative to many less economically developed nations. This disparity can create a reputational risk. Conversely, national actions to address sustainability do not always translate into improved perception, which is a missed opportunity to generate Soft Power.

To illustrate this, we have conducted additional analysis using the UN Sustainable Development Goals Index to quantify the divergence between sustainability perceptions and performance. The analysis highlights that many nations are not currently receiving the recognition and Soft Power benefits that they deserve based on their progress against the UN Sustainable Development Goals (SDGs).



Central and Eastern Europe as well as the Caribbean countries outperform public perception in sustainability performance. Among the top 10 are Finland, Cuba, Ukraine, Croatia, Latvia, Slovenia, and Jamaica.

These nations collectively are making strides towards the ideals of the UN SDGs, particularly in social equality, educational attainment, environmental protection, and economic growth, relative to their levels of consumption. Effectively communicating a strong sustainability position presents a significant opportunity to enhance and leverage Soft Power.

Where sustainability performance lags perception, a reputational risk exists. This mismatch is common in the many of the most economically developed nations.

These are among the nations taking the most extensive, formal steps to address sustainability. They actively communicate these efforts and have big platforms to do so.

In addition, they tend to have larger budgets to communicate the natural beauty of their landscapes to promote tourism. This creates very strong sustainability perceptions, yet their high levels of consumption and only limited real progress on environmental SDGs means that perceptions outrun progress, leading to a reputational risk.

### **The outlook for sustainability and Soft Power**

Nations and global businesses attend the annual UN Conference of Parties (COP) in attempt to make joint commitments, share their achievements, and project themselves to the world as key players in international sustainability.

COP29 was hosted in Baku, Azerbaijan in late 2024, and while it had a bold agenda for mobilising finance to developing nations and eliciting voluntary contributions from fossil fuel-producing countries, outcomes were incremental.

Overall, the appetite for productive COPs in the years after the 2015 Paris Agreement seems to have declined, against a backdrop of increased environmental degradation, carbon emissions, and damage to infrastructure and human health from climate change.

This comes as governmental change, most notably in the US, seems to be draining enthusiasm for multilateral cooperation on sustainability.

The United States' exit from the Paris Agreement is likely to lessen public trust in its accountability and the strength of the agreement for the other signing parties. Similarly, intentions to repeal the Inflation Reduction Act would disincentivize investment into the nation's renewable energy markets.

In contrast, the EU continues to lead the charge on sustainability data disclosure, carbon emissions trading, and human rights due diligence. Our research underlines the fact that European countries may receive a Soft Power dividend for this continued commitment.

However, as other major nations pull away, will Europe (and many other smaller and island states) sustain their support for sustainability?

# Nation Brand Value 2025: Key trends, ranking shifts, and economic insights



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Brand Finance is proud to present the 2025 Nation Brand Value ranking – marking the 21<sup>st</sup> edition of this landmark study.

Nation brand value represents the monetary worth of a country's reputation and image, shaped by its economic performance and global standing.

Assessing a nation's brand value requires analysing its financial strength and influence in the global marketplace. A key component of this evaluation is the Global Soft Power Index (GSPI), as nation brand perceptions drive economic benefits and enhance nation brand value.

To assess the financial strength of a nation brand, Brand Finance utilizes publicly available, reputable data sources, including the IMF, World Bank, and UN. This year, Brand Finance has incorporated Oxford Economics as a key data provider in order to offer a more refined and segmented analysis of nation brand values. Moving beyond broad overviews, we have examined over 40 key sectors contributing to GDP across more than 70 leading nations. This approach offers a deeper and more precise understanding of the forces shaping a nation's brand value. For nation brand managers and policymakers, this translates to a game-changing level of insight: the ability to identify high-potential sectors, target investment effectively, and craft data-driven strategies to elevate your nation's brand globally.

Before exploring the results of the leading nation brands in 2025, let us first examine the broader trends shaping the global economy.

## A world of divergence and uncertainty





















The IMF's World Economic Outlook (WEO), which was released in January 2025, identifies the theme for the year to be "Divergent and Uncertain". The global economy is projected to expand by 3.3% in both 2025 and 2026.

While this figure remains unchanged since WEO's last update, the stability masks underlying shifts, including an upward revision for the United States offsetting downward revisions in other major economies. Global headline inflation is expected to decrease to 4.2% in 2025 and 3.5% in 2026, with advanced economies returning to their inflation targets sooner than developing economies.

The IMF identifies that the near-term economic outlook faces varied risks. The United States economy might surpass expectations, while other countries face potential setbacks due to policy uncertainty. Medium-term risks are "tilted to the downside," meaning there is a greater probability that the actual economic outcomes will be worse than the baseline projections. Managing these risks requires careful policy decisions to balance inflation and economic activity, strengthen financial resilience, and implement structural reforms.

## Top 20 Nation Brand Values 2025 (USD bn)

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	<b>1 =</b>	United States		<b>11 =</b>	Australia
		\$37,329			\$2,018
		+15.7%			+12.6%
	<b>2 =</b>	China		<b>12 ▼</b>	South Korea
		\$20,530			\$1,994
		+2.9%			+3.0%
	<b>3 =</b>	Germany		<b>13 =</b>	Netherlands
		\$5,000			\$1,547
		+0.3%			+11.3%
	<b>4 ▲</b>	United Kingdom		<b>14 ▲</b>	United Arab Emirates
		\$4,446			\$1,223
		+10.1%			+15.2%
	<b>5 ▼</b>	Japan		<b>15 ▲</b>	Saudi Arabia
		\$4,210			\$1,190
		-4.4%			+14.3%
	<b>6 =</b>	France		<b>16 ▼</b>	Switzerland
		\$3,887			\$1,143
		+10.3%			+7.3%
	<b>7 =</b>	India		<b>17 ▼</b>	Indonesia
		\$2,771			\$1,091
		-5.9%			+3.5%
	<b>8 =</b>	Canada		<b>18 ▲</b>	Poland
		\$2,729			\$1,061
		+2.2%			+22.9%
	<b>9 =</b>	Italy		<b>19 ▼</b>	Mexico
		\$2,403			\$1,042
		+3.3%			+1.0%
	<b>10 ▲</b>	Spain		<b>20 ▼</b>	Brazil
		\$2,218			\$974
		+26.4%			+6.9%

## Shifting fortunes in the top 20: Nation Brand dynamics in 2025

The United States continues its reign as the world's most valuable nation brand. In 2025, its brand value reached a staggering \$37.3 trillion, a 16% increase. This impressive growth is underpinned by the nation's strong economic performance in 2024, during which the United States achieved a real GDP growth of 2.8%. The United States' economic vitality, fuelled by robust consumer spending and innovation, translates directly into global Influence, enhanced nation brand perceptions and attractiveness for investment and talent.

China retains its position as the second most valuable nation brand, with marginal uplift in brand value by 3%. Despite economic challenges, including a property market slowdown and weak consumer confidence, Chinese corporate brands and the nation brand continue to expand their global influence through rising Soft Power. This highlights the increasing importance of nation brands as strategic assets, with China actively leveraging Soft Power to sustain and enhance its global standing amid economic pressures.

Whilst Germany retains its rank as the third most valuable nation brand, Japan's sluggish economic growth has allowed the United Kingdom to overtake it, now securing fourth place. The IMF forecasts the UK's GDP to grow in 2025, making it the third-fastest growing economy in the G7. However, uncertainty remains. While the UK is set to outpace major European economies like Germany, France, and Italy, several other European countries, including Poland and Spain, are expected to grow at a faster rate.

Reflecting this momentum, both Spain and Poland have climbed two places in the ranking, with Spain entering the top 10 in the Nation Brand Valuations.

Spain's strong economic performance is fuelled by a booming tourism sector, a resilient labour market, and effective deployment of EU recovery funds. Poland, meanwhile, is benefiting from

rising wages, government support for families, and easing inflation, all of which are driving increased private consumption.

India's nation brand value has declined by 6%, with GDP growth expected to slow due to a combination of domestic and global factors. Weakness in manufacturing and services, along with reduced government spending, is contributing to the slowdown.

Additionally, global trade disruptions and subdued global growth are impacting India's exports. However, despite these challenges, the economy is still projected to expand at a steady pace, supported by strong domestic demand and a resilient financial sector, allowing India to maintain its position among the top 10 nation brands.

### Regional leaders in Nation Brand Value

#### Europe

Europe saw moderate economic growth in 2024, fuelled by rising employment and growing household disposable income, yet the overall outlook remains cautiously optimistic.

Germany retains its position as the region's most valuable nation brand, despite facing considerable economic challenges that led to a contraction in 2024.

While a modest recovery is anticipated in 2025, persistent structural issues and global economic uncertainties continue to temper expectations. Germany also records a decline in global Reputation and Influence, as reflected in the Global Soft Power Index. United Kingdom and France record an uplift in brand value led by improving economic outlook in comparison to 2023.

#### Asia

Asia's economic growth is expected to slow in 2025, with various sources pointing to a lower growth compared to 2024. Escalating geopolitical tensions and trade disputes

### Europe (USD bn)

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Rank 2025	Nation	2025 Nation Brand Value	Brand Value Change
1	Germany	\$5,000	0.3%
2	United Kingdom	\$4,446	10.1%
3	France	\$3,887	10.3%
4	Italy	\$2,403	3.3%
5	Spain	\$2,218	26.4%

### Asia (USD bn)

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Rank 2025	Nation	2025 Nation Brand Value	Brand Value Change
1	China	\$20,530	2.9%
2	Japan	\$4,210	-4.4%
3	India	\$2,771	-5.9%
4	South Korea	\$1,994	3.0%
5	Indonesia	\$1,091	3.5%

### Americas (USD bn)

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Rank 2025	Nation	2025 Nation Brand Value	Brand Value Change
1	United States	\$37,329	15.7%
2	Canada	\$2,729	2.2%
3	Mexico	\$1,042	1.0%
4	Brazil	\$974	6.9%
5	Chile	\$285	4.6%

### Middle East (USD bn)

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Rank 2025	Nation	2025 Nation Brand Value	Brand Value Change
1	United Arab Emirates	\$1,223	15.2%
2	Saudi Arabia	\$1,190	14.3%
3	Egypt	\$443	4.4%
4	Qatar	\$270	0.0%
5	Iran	\$212	7.9%

### Africa (USD bn)

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Rank 2025	Nation	2025 Nation Brand Value	Brand Value Change
1	South Africa	\$215	3.3%
2	Nigeria	\$141	-14.9%
3	Algeria	\$106	21.8%
4	Morocco	\$99	13.9%
5	Kenya	\$63	20.7%



present risks, particularly for the region's three largest economies – China, Japan, and India. China sees a slight increase in its nation brand value, while Japan and India experience declines. Despite the more subdued economic outlook, China, Japan and India maintain their dominance in the Nation Brand Valuations led by strong Soft Power perceptions.

### Americas

As the United States stands in a league of its own, Canada and Mexico remain the second and third most valuable nation brands in the Americas. Canada experiences a positive outlook in its economic growth due to easing monetary policy, stimulating household and business spending. This, combined with the stable performance in the Global Soft Power Index, results in an upward movement in its brand value by 2%.

Mexico records stable nation brand value led by subdued economic outlook, with economic growth expected to be lower than in previous years.

### Middle East

In 2024, the Middle East's economy saw modest growth, though uncertainty lingered. The World Bank projected a GDP growth rate of 2.2% for the region, but this was tempered by ongoing conflicts and oil production cuts that have slowed many regional economies. Despite these challenges, countries not directly affected by conflict have seen positive economic outcomes.

The United Arab Emirates stands out with substantial progress, while Saudi Arabia also demonstrates strong economic performance. Our GSPI research underscores that both nations have made significant strides in science and technology, contributing to their overall growth. The UAE's comprehensive policies focused on AI, renewable energy, and space exploration have been key drivers of its economic development. Meanwhile, Saudi Arabia continues to make strategic investments under Vision 2030, prioritizing digital transformation and renewable energy.

### Africa

Despite global economic challenges, African nations continue to demonstrate resilience. South Africa remains the region's most valuable nation brand, retaining its position from 2024. Our research highlights that its overall strength is supported by improvements in Education & Science, reflecting the country's commitment to innovation and the development of a knowledge-based economy.

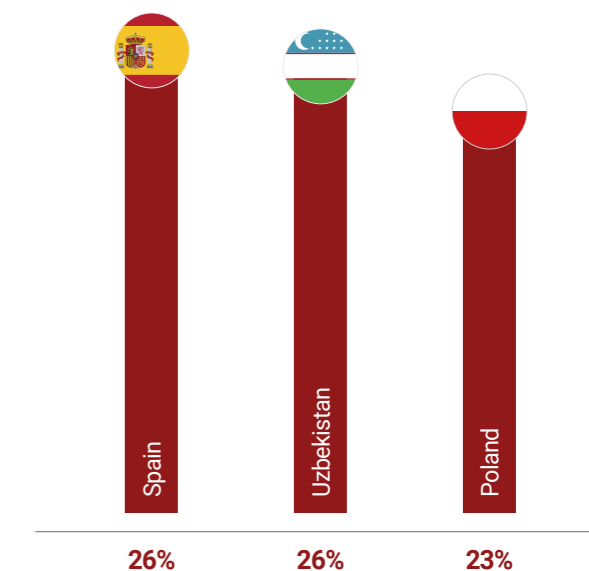
### A Spotlight on the fastest growing nation in the Top 100

As mentioned earlier, this year's Nation Brand Value ranking introduces a more detailed segmentation of a nation's brand value, looking at over 40 sectors that contribute to a nation's GDP. What does this mean for nation brand managers and policy makers? It highlights the importance of identifying high-potential sectors, directing investment effectively, and developing data-driven strategies to enhance your nation's global brand.

Spain stands out as one of the fastest-growing developed nations, with an impressive 26% increase in its nation brand value. This growth is driven by several key sectors—retail, healthcare, real estate, and professional services—which together account for over 50% of Spain's nation brand value. Notably, utilities and technology sectors are emerging as the fastest-growing areas, indicating a broader diversification of Spain's economic strength.

Spain's rising brand value is also bolstered by the presence of leading corporate brands, such as Santander, Zara, BBVA, Iberdrola, and Movistar. These influential global brands play a pivotal role in shaping global perceptions of Spain, contributing significantly to its reputation as a competitive and innovative nation. Their international success reinforces Spain's image and strengthens its position on the global stage, particularly in the areas of fashion, finance, telecommunications, and energy.

### Top 3 Fastest Growing Nations in the Top 100 © Brand Finance Plc 2025



This refined segmentation of nation brand value highlights how a nation's economic sectors, corporate leaders, and global perceptions are interconnected. By leveraging these insights, nation brand managers can more effectively shape strategies that foster international recognition and drive sustained growth in the global market.

### Nation Brand valuations – A tool for maintaining and measuring global influence

As global trends evolve, understanding how specific sectors contribute to a nation's reputation and brand value is more important than ever. Despite the uncertain economic outlook, measuring nation brand value remains a vital tool for identifying opportunities, directing investments, and shaping strategies to enhance a nation's standing on the global stage. This ongoing assessment ensures that nations can effectively navigate challenges, build competitive advantages, and foster sustainable growth in a dynamic global economy. Additionally, as Soft Power continues to play an increasingly significant role in shaping perceptions, measuring and managing nation brand value is essential for maintaining global influence and resilience in an interconnected world.





03

**Brand  
Spotlights**



**Zhang Li**

Director of China National Tourist Office, London



中国驻伦敦旅游办事处  
CHINA NATIONAL TOURIST OFFICE LONDON

**China has made significant strides in Soft Power, rising to 2<sup>nd</sup> place in this year's Global Soft Power Index. Why is it important for China to measure and manage its nation brand perceptions?**

China views soft power as important for fostering global understanding, cooperation, and mutual respect. By cultivating and managing its nation brand perceptions, China aims to enhance its global image, promote its cultural heritage, and showcase its development achievements.

This helps counter misconceptions and biased narratives often propagated by some Western media, build trust, and present an accurate image to the world.

A positive and accurate nation brand supports China's goals of peaceful development, economic partnerships, and global governance contributions, aligning with its vision of a shared future for mankind.

**China is opening up to tourists on an unprecedented scale. What are some of the key initiatives that the government has pioneered to grow the visitor economy?**

China's recent policies to enhance inbound tourism have significantly boosted international visitors' willingness and convenience to explore the country. Key measures include:

**1. Visa Optimisation:**

Expanding visa-free access for more and more countries, implementing a 240-hour visa-free transit policy, and allowing visa-free entry for foreign tourist groups arriving by cruise ships.

**2. Flight Resumption:**

Increasing international flights, for example, there are 8 airlines now operating between the UK and China.

**3. Payment Flexibility:**

Introducing diverse payment options to cater to international tourists, especially digital tourism platforms to improve visitor convenience.

**4. Customs Efficiency:**

Streamlining customs clearance processes for smoother entry and exit.

**5. Global Campaigns:**

Launching international marketing campaigns, such as "Ni hao! China" a new national travel logo to raise awareness of China's diverse attractions.

These initiatives have not only improved the travel experience but also strengthened cultural exchanges and economic ties, positioning China as a more accessible and attractive destination for global tourists.

**China is globally recognised for its rich heritage (3<sup>rd</sup>), food (8<sup>th</sup>), as well as arts and entertainment (9<sup>th</sup>). How is the China National Tourist Office leveraging these**

**advantages to attract international visitors?**

The China National Tourism Office in London is capitalising on China's global recognition in heritage, food, and arts to attract international visitors through targeted campaigns. These include:

**1. Cultural Events:**

Hosting exhibitions, performances, and festivals showcasing China's rich heritage, traditional arts, and contemporary culture.

**2. Culinary Promotions:**

Organising food festivals, cooking demonstrations, and partnerships with UK restaurants to highlight Chinese cuisine.

**3. Themed Tours:**

Promoting curated travel packages focused on heritage sites, culinary experiences, and arts destinations.

**4. Digital Outreach:**

Using social media and online platforms to share engaging content about China's cultural and culinary attractions.

**5. Collaborations:**

Partnering with UK travel agencies, airlines, and local tour operators to amplify China's tourism appeal.

By emphasising these unique strengths, the office aims to enhance China's image as a top travel destination, encouraging more UK and international tourists to explore its diverse culture and travel resources.



Estonia



Rank #65 ▼ #57  
Score 38.3/100 -0.6



**Kata Varblane**  
Director of Country  
Promotion,  
Enterprise Estonia

estonia

**The Global Soft Power Index provides key insights into how nations are perceived worldwide. How has Enterprise Estonia incorporated these findings into its approach to strengthening Estonia's brand globally?**

While the Global Soft Power Index research shows that Estonia's overall familiarity falls a bit below the United Nations' average, those who do know us tend to hold a remarkably positive image of us. This positive reputation isn't just flattering, it's powerful.

To continue building this reputation, we need to move beyond the aspects of Estonia that people already know and admire—our leadership in e-governance, ease of doing business, and willingness to support other countries. It's time to highlight the lesser known but equally defining qualities that make Estonia unique: our role as an innovation testbed, a hub for smart manufacturing, and a wise business tourism destination.

We now have valid, comparable data on Estonia's international image thanks to the Global Soft Power Index. This data allows us to make smarter, more informed decisions. In a world that demands customer-centric approaches, a one-size-fits-all strategy no longer works.

To stay ahead of our audience's needs, we've tailored our content, from refreshing our brand's central story to building a network of ambassadors to

provide insight and strategic information to messaging.

**Estonia has consistently performed well in perceptions of tech innovation. How is Estonia positioning itself as a leader in this area, and what new initiatives are being pursued to maintain and enhance this reputation?**

The principle of "actions speak louder than words" is especially relevant for country branding, especially for Estonia. Estonia hasn't ever relied on purchasing media placements, we must earn our reputation. That means staying true to our values and leading by example—whether through pioneering digital government, launching initiatives like e-Residency, or standing as a vocal supporter of Ukraine.

Just recently, we reached an extraordinary milestone by becoming 100% digital country, or 0% 'bureaucrazy' as we like to say. As of December 2024, every service can now be done online, marking a new era in citizen-centric governance. Estonia has also launched a fresh e-government app for citizens, bringing nearly 50 government services directly to users' mobile phones. This achievement positions Estonia as a global leader in digital governance and sets a benchmark for nations worldwide.

All this relies on our strong collaboration with our technology sector and mindset that Estonia is ready to tackle seemingly impossible

challenges — new emerging technologies, climate crises, the fight for democratic principles — with the promise of a better future.

**This year's drop in Estonia's rank is influenced by Russia's negative perceptions of the nations that are most vocal in their support for Ukraine. How is Estonia countering Russian disinformation domestically and internationally?**

We in Estonia believe that the best remedy against falsehood and disinformation is truth and open communication. As a state, we follow this principle both in our communication with our citizens and with external partners — we always speak honestly and openly about how we see things and why.

The truth may not always please everyone, but the truth sets you free. There is no silver bullet to fend off disinformation. Estonia employs a multifaceted approach to countering information influence, focusing on media education at all school levels, support for independent journalism, monitoring hostile narratives in collaboration with the public sector, NGOs, and volunteers. We see from the Global Soft Power Index research, that trustworthy media is one of the more important drivers of our reputation internationally. Additionally, it ensures open communication with media and citizens, and strong international cooperation with like-minded countries and organizations.



Mongolia



Rank #108 ▲ #122  
Score 32.4/100 +0.4



**Nomin Chinbat**

Minister of Culture,  
Sports, Tourism  
and Youth of Mongolia

**MONGOLIA**  
· ALWAYS · MOVING ·

**The 'Go MonGolia' campaign is a bold step in strengthening the nation's global image. Why is nation brand management a priority for Mongolia, and what impact do you hope this initiative will have on Mongolia's perceptions internationally?**

Our recent national branding exercise is a relatively new phenomenon in Mongolia, but a crucial one.

For many years, international stakeholders, investors and tourists either had a predetermined idea of the country or were not aware of the amazing opportunities to be found here.

Mongolia is witnessing tremendous change both economically and in terms of how we orient ourselves to the rest of the world. The country exudes a youthful dynamism and aspiration that is truly alive and kicking.

Accordingly, a national brand was required that would draw people to us, inspire our citizens, and ultimately unlock both foreign direct investment and our burgeoning tourism sector.

Mongolia is a unique blend of rich heritage, nomadic traditions, and a vibrant youthful population. Our hope is that our national brand will foster deeper cultural relations abroad and inspire others to travel, trade with us, and ultimately fall in love with our beautiful landscape.

**Lonely Planet named Mongolia the top country to visit in 2024 - one of a growing number of international recognitions for the nation's tourism potential. What is the importance of tourism for other sectors of Mongolia's economy?**

For many years Mongolia has been reliant on the proceeds of mining. Yet a landscape three times the size of France has much to offer both investors and those seeking new adventures.

Tourism is and will play an increasingly pivotal role in our economic diversification. The more tourists we attract, the greater chance of other sectors of the economy finding new pathways to prosperity.

While tourism accounts for just over 7% of the country's total exports, the number of visitors increased last year by 160,000 to a new high of 810,000 - contributing \$1.6 billion USD to the economy.

Our aim is to welcome 2 million visitors by 2030 (\$8 billion USD). As more people travel to Mongolia, additional infrastructure will be required which in itself promotes further inbound investment and economic development. In a global marketplace it is important to stand out. This is why we are so proud of our national branding campaign and awards such as that bestowed by Lonely Planet highlighting our unique potential.

**According to the results of the Global Soft Power Index 2025, Mongolia's strongest nation brand attribute is 'rich heritage'. What role does culture play in shaping the nation's international appeal?**

Many associate Mongolia with our rich cultural heritage and the Chinggis Khaan empire. Our ancestral links serve as a cornerstone of our 'soft power' as enshrined in our 'Vision 2050' strategy.

While we are a nation of the move, around half of the country outside the capital maintain a nomadic lifestyle. Nomadic heritage is woven into our daily lives even today - this is what makes us unique from the rest of the world.

We Mongolians take pride in the fact that our rich cultural heritage is passed down from parents to children, evolving and coexisting with modern day life.

Our unique traditions shape how global audiences see us allowing us to maintain a distinct national identity that resonates worldwide and is utilised as a powerful foreign policy tool. By using culture and national branding to engage with the rest of world we are showcasing that we are 'open for business.'

As the Prime Minister has often said publicly, 'we are landlocked, but not mindlocked'.



# New Zealand



Rank #25 ▲ #26  
Score 53.1/100 +0.6



**David Downs**  
CEO,  
New Zealand Story



## Background

New Zealand Story's primary challenge is to shift global perceptions of Aotearoa New Zealand and expand our country's reputation and value internationally. We're well known for our beautiful landscapes and friendly people, but we also want to be recognised as a place offering excellent opportunities to work, live, invest, study and visit.

For many years, we've relied on a broad research portfolio and third-party insights to understand how other countries viewed New Zealand. However, the research was conducted on an ad hoc basis, prompting a need for a more deliberate, structured approach to inform strategy, execution, and evaluation.

To address this, we consulted with key government partners, including Tourism, Education, Foreign Affairs, and Trade agencies, to refine our research approach. The new direction focused on creating a connected programme to inform content and align efforts across these organisations, ensuring an annual research cycle that stakeholders can depend on for strategic insights, and guide the development of a New Zealand brand plan for the coming years.

In 2023, we recommended to our Advisory Board that Brand Finance's Global Soft Power Index be used as the primary data source for nation brand metrics, setting the scene for the development of a more comprehensive research programme.

## Strategy

We set out to align partner organisations around a research-driven marketing strategy to enhance the economic impact of the nation brand across sectors, from investment to tourism. Brand Finance's metrics, connecting perceptions to performance, provided a rationale for this approach and a foundation to build on.

The programme comprised four steps:

- + Brand Finance's Global Soft Power Index Data: Understand New Zealand's perceptions as well as drivers of Reputation and Influence across key markets, identifying strengths and weaknesses to map against areas of focus, and provide insight to guide content strategy.
- + Qualitative Research: Gain a richer understanding of consumer perspectives and refine content tactics to credibly shift perceptions.
- + Media and Social Monitoring: Evaluate content effectiveness and engagement, alongside campaign reporting, A/B testing, and ad testing.
- + Stakeholder Survey: Assess New Zealand Story's performance in protecting and promoting the nation brand, informing future tactics.

Brand Finance's data has provided a globally validated, quantitative insight on 'what' New Zealand's credible

positioning strategy should be: improving science, technology, and innovation perceptions, identified as key drivers of influence. This focus allows us to leverage our country's strengths in business, sustainability, and education.

The qualitative research has helped understand the 'why' behind Brand Finance's data, allowing us to develop activation tactics that resonate in target markets and can shift perceptions. The key story emerging from the research and subsequently highlighted in marketing communications centres on innovations that are good for people and the planet – New Zealand's natural areas of strength where others are willing to learn from it.

## Results

We successfully implemented the research programme, supported by a stakeholder engagement plan. This included a full dissemination plan, tailored PR & communications approach, and engagement with key partners both in government and the private sector.

Cross-government organisations are now working more closely together, aligning brand vision and marketing communications, thanks to the new research programme.

The research programme has demonstrated its value to government stakeholders, ensuring the continuation of this work.




**Dr Samina Zehra**

Economic Minister,  
Pakistan High  
Commission in London



**Women's participation in business and international trade is a growing focus in Pakistan, with the Khadijah Programme garnering global recognition. What steps is Pakistan taking under this initiative and others to expand career opportunities for women in trade, and how does this align with the nation's broader economic strategy?**

The Government of Pakistan's economic growth agenda recognises the potential for women in multilateral trade. An integrated approach ensures women gain access to emerging opportunities in global markets. The Khadijah Programme is a notable example, designed to empower women traders of goods and services by providing financial and digital literacy, training, capital access and international market connectivity. Women are equipped with skills to engage in cross-border trade, scale their businesses and become a part of the global supply and value chains. The emphasis is on creating sustainable ecosystems that enable women entrepreneurs across the country irrespective of geographical or sectoral diversity.

Pakistan's Uraan Program includes several initiatives designed to expand career opportunities for women in trade, such as Women on Wheels. This initiative enables women to access work and educational opportunities in sectors where mobility is crucial, promoting economic independence and increasing their participation in trade and other high-growth industries.

**The rise in 'affairs I follow closely' indicates that more people are paying attention to Pakistan's affairs globally. How can Pakistan leverage this increased attention to turn the focus away from negative news towards positive developments in the country, and what role does economic diplomacy play in this effort?**

Economic diplomacy must go beyond money and investment talk; its true measure is in bringing the world together. As we inch towards fragmentation, Pakistan stands committed to bridging divides and takes a people-centric approach to economic growth and development.

Despite political and economic challenges, Pakistan has always stood for peace, multilateralism and people-to-people contact for welfare gains. There are extraordinary stories of success in tech, climate solutions, cultural and sports achievements. Pakistani women have won Oscars, scaled mountains, made their mark in international trade through programs like Khadijah.

As a woman working in economic diplomacy, I believe that economic development must expand to include a woman's angle. Only then will it become a tool not just for investment and financial gains but for making the world one we can be proud of passing onto future generations. The rise in "affairs I follow closely" provides a unique opportunity to showcase Pakistan's true face, offering the world a mirror to reflect this beauty.

**With Pakistan undoubtedly a key player in international security, what do you see as the biggest challenges in developing its Soft Power? How is the nation working to address these and unlock new opportunities?**

In a fragmented world, Pakistan maintains strong diplomatic ties with its neighbours, emphasising sovereignty and international law, positioning itself as a stabilising force in the region. It also has excellent diplomatic relations with leading economic powers, small and medium states in all continents of the world. It is a signatory to most multilateral treaties pertaining to security, climate and human development showing its commitment to shared responsibility towards global existence.

Internally, through a whole-of-government approach, Pakistan is focusing on boosting its exports, accelerating digital transformation, developing green energy solutions, while promoting sustainable practices and social justice. This integrated approach aims to rejuvenate Pakistan's economy, uplift its predominantly young population into a new age of prosperity, and be a forward-looking nation. Economic Minister's office at Pakistan High Commission London has promoted Government of Pakistan's agenda of inclusive growth through promoting women-led and entrepreneurs-driven economic growth for the country. All these steps are sure to contribute towards its Soft Power.



Poland



Rank #32 ▲ #33  
Score 48.7/100 +0.1



**Anna Godlewska**

Deputy Director,  
Department of Public  
and Cultural Diplomacy,  
Ministry of Foreign  
Affairs of the Republic  
of Poland



**Brand Finance is proud to announce that we are working with Poland's Ministry of Foreign Affairs to prepare a strategic roadmap for public and cultural diplomacy based on insights from the Global Soft Power Index drivers analysis. Why is it important for you to root your strategy in data?**

Poland's MFA wants its public and cultural diplomacy to be effective. Data helps policymakers and diplomats assess public opinion, cultural trends, and the general mood in the target country or region. This enables them to tailor messages and initiatives in ways that are more likely to resonate with local populations.

A public survey and analysis in a given country done by a local research agency provides diplomats and governments with a valuable look at the data in that specific country. However, we look at different methodologies, questions, and approaches if we have several surveys or analyses. Then, finding the common thread that would enable us to build a good general strategy is very difficult. In the case of the Brand Finance Global Soft Power Index data, we have one methodology implemented in all the markets and the experience of several editions, which allow us to see trends, reflect on our strengths, and ultimately improve.

A strategy rooted in data will, in the end, enable our partners to deliver more attractive products to foreign markets and audiences, and our missions abroad would support them more efficiently.

**How can a reinforced focus on Soft Power benefit Poland in today's world?**

I know that someone who has visited our country has a better opinion of Poland and about us Poles. Sometimes, there needs to be one single spark to inspire a person to visit Poland – a book by Olga Tokarczuk or a TV coverage on the Great Orchestra of Christmas Charity. Once a year, people all around Poland wear a big red heart sticker, a label of the Orchestra and a proof that they donated money for the paediatric and elderly care. This is also a message that in Poland, solidarity matters. Foreigners who come to Poland at that time are in awe of the phenomenon.

Current Polish diplomacy objectives include the statement "Poland in solidarity." We promote it and act accordingly, "in solidarity" with Ukrainian neighbours who resist the aggressor threatening their freedom and self-determination. Polish cultural diplomacy enables Ukrainian artists to cooperate with our missions and present their artistic projects to have a space to perform and remind the world about the war.

The Polish Ministry of Foreign Affairs supports cultural initiatives and projects to attract visitors. We are fostering our nation brand with a study tours programme -attracting new visitors and investments while breaking stereotypes about Poland. From the latest Brand Finance report, perceptions of governance,

respect for law, and reputation have seen modest increases. However, there is great potential in promoting our country – our education and culture. Beautiful landscapes, well-developed infrastructure, safe and clean cities – such an image of Poland should become popular in the world.

**What initiatives in cultural relations are you working on that could serve as examples to others?**

People are tired of living in a world that is becoming more fragmented and volatile. With our British partners, we wanted to confirm that we need to intensify efforts to strengthen bilateral cultural relations between Poland and the UK in the changing world and political landscape, particularly with security as our everyday priority.

Both governments have supported programs that bring Polish communities in the UK and British citizens together to explore shared experiences through art, music, and history and showcase what they've got best in their own cultures.

That is why we are happy to collaborate on the cultural Season with the United Kingdom. Over 100 events in the fields of cinema, theatre, visual arts, design and music will be held from March to November in the UK and Poland. The program is coordinated on the one hand by the British Council and on the other by the Adam Mickiewicz Institute and the Polish Cultural Institute in London.





**Sofia Bard**

Head of Unit,  
Sweden Image Analysis  
Unit, Swedish Institute



**Cecilia Andrae**

Senior Adviser,  
Sweden Image Analysis  
Unit, Swedish Institute



**Sweden has consistently ranked among the world's most admired nations, and this year, it has climbed one position in the Global Soft Power Index. How is the Swedish Institute using insights from the Index to shape Sweden's nation brand and global engagement strategy?**

Swedish Institute's mission is to analyse and follow the image of Sweden abroad, as well as to communicate and promote Sweden.

We also support communication and promotional activities implemented by Swedish foreign missions. We provide strategic insights that can be used when developing or adjusting strategic communication and promotion about Sweden, based on analysis of how Sweden performs in different areas, how Sweden is portrayed in international media, and about how Sweden is perceived.

One example is a new communication strategy for brand Sweden, to be launched this spring. The Global Soft Power Index is one useful source of information, pointing at strengths as well as future opportunities. We closely follow Sweden's brand in different markets, as well as in areas that reflect Sweden's strengths, for example governance, innovation, international contribution and efforts for the green transition.

**Sweden ranks in the top 10 in half of all Soft Power attributes, demonstrating a well-balanced and globally competitive profile. What aspects of Sweden's brand do you believe hold the greatest potential, and what future initiatives will the Swedish Institute focus on to maximise Sweden's Soft Power?**

We believe Sweden's strong governance, quality of life, equality and stability, in combination with a highly knowledge intensive and technological industry, is a great asset.

Being perceived as an innovation leader holds great potential - this is how we would like the Sweden brand to be perceived.

Two key initiatives this year are the launch and implementation of a new communication strategy for the brand Sweden, and the establishment of a national Team Sweden communication network.

The network includes key staff from about one hundred companies and organisations – already working with the brand Sweden and interested to contribute to a competitive image of Sweden. The communication strategy has been elaborated in a very inclusive process, involving many organisations from the private and public sector. This creates ownership and legitimacy for the new strategy, that aims at strengthening Sweden's competitiveness.

**Sweden has seen notable improvements in perceptions, including in Europe, likely influenced by Sweden joining NATO and Sweden's support for Ukraine. How does Sweden's position impact its Soft Power, and the communication of the Swedish Institute?**

Geopolitical shifts and tensions affect many countries, including Sweden. Over time our international profile has always been a strong asset and in most countries Sweden has a strong brand. Being perceived as a country contributing to the common good is an asset from a brand perspective.

For Sweden this regards especially the contribution to a green transition and support to other countries in need. Today there seems to be a positive trend for Sweden's Soft Power in Europe, perhaps strengthened by Sweden joining NATO and the support for Ukraine.

We can also see that Sweden's firm support for liberal values and democracy is sometimes challenged. Long-term fact-based communication and promotion is very important to build knowledge and trust in Sweden in different parts of the world.






# Switzerland



Rank #8 = #8  
Score 64.9/100 +2.0



**Alexandre Edelmann**  
Head of Presence  
Switzerland

 Schweizerische Eidgenossenschaft  
Confédération suisse  
Confederazione Svizzera  
Confederaziun svizra

**Switzerland holds the top spot for Reputation and excels in perceptions of stability and trustworthiness. How does Presence Switzerland navigate the balance between being seen as reliable while also enhancing perceptions of dynamism and appeal?**

Switzerland is widely recognised for its stability, trustworthiness, and high-quality standards. This reputation stems from multiple factors, including our unique political system, which combines semi-direct democracy with a collegial Federal Council, fostering consensus among diverse stakeholders. The strength of Swiss exports, from precision watchmaking and chocolate to pharmaceuticals, machinery, and a globally renowned financial center, reinforces this image. Our world-class education system and significant investment in research and innovation further contribute to our leadership.

While stability might seem at odds with dynamism, it actually enables adaptability and long-term innovation. A solid foundation allows Switzerland to evolve efficiently, responding to global challenges without compromising its core values. Our pragmatic culture, which integrates diverse expertise and perspectives, enhances our agility. At Presence Switzerland, we highlight these qualities, showcasing how reliability and excellence go hand in hand with innovation, ensuring that Switzerland remains both a trusted and dynamic global partner.

**The Federal Council recently adopted the new strategy for 2025–28, focusing on trust, innovation, and Switzerland's role in Europe and the G20. What are the key priorities within this framework, and how will Presence Switzerland be implementing them on the global stage?**

The Federal Council's 2025–28 strategy focuses on strengthening trust, fostering innovation, and reinforcing Switzerland's role in Europe and the G20. Trust remains a cornerstone of Switzerland's global positioning, built on political stability, high-quality standards, and a strong financial center. Innovation is another key pillar, driven by world-class research institutions, cutting-edge industries, and a commitment to sustainability. Additionally, Switzerland's engagement with Europe and the G20 reflects its dedication to multilateralism and global collaboration.

Presence Switzerland will implement this strategy by promoting Switzerland's strengths through public diplomacy, strategic partnerships, and international events. We will showcase Swiss excellence in technology, finance, and sustainability while fostering dialogue on global challenges. By leveraging our reputation for reliability and agility, we aim to reinforce Switzerland's role as an innovative and forward-looking partner. Through targeted campaigns and initiatives, we will ensure Switzerland remains a trusted, dynamic, and influential global actor.

**Switzerland comes #1 in more Global Soft Power Index metrics than any other nation brand and continues to enjoy strong Recommendation among respondents. How does Presence Switzerland leverage Soft Power to boost investment, trade, talent, and tourism attraction?**

We cannot deny that we are pleased with these results. They reflect Switzerland's intrinsic qualities—our nation brand is primarily a consequence of our reality.

Our mission at Presence Switzerland is to amplify these strengths. One of our key messages is that Switzerland's success is the success of its partners. We are a country that brings value to others, whether through Geneva's role in multilateralism, Swiss components integrated into global industries, or our diplomats working for peace.

Presence Switzerland shapes global perceptions through its initiatives and, most importantly, by supporting Switzerland's diplomatic network worldwide. We collaborate closely with tourism and economic promotion agencies, as a strong, differentiated, and credible image benefits all. The same overarching factors—trust, quality of life, and education—drive investment, trade, and tourism.

Trust in Switzerland is our most valuable asset, a foundation from which all other strengths emerge.



# United Kingdom

Rank #3 ▼ #2  
Score 72.4/100 +0.6



**Patricia Yates**  
CEO, VisitBritain  
VisitEngland



**Film and TV are powerful drivers of tourism. How is the 'Starring GREAT Britain' campaign leveraging this trend to inspire travel to the UK, and what impact do you expect it to have on inbound tourism?**

Films and TV shows are powerful motivators for travel. Our screen tourism research, shows more than 9-out-of-10 of potential visitors we surveyed, were keen to visit film and TV locations used in filming during their holidays in the UK.

Our campaign 'Starring GREAT Britain' is harnessing this screen tourism trend with Britain the real star of show. We're using films and TV shows as hook to tell the story of Britain today, showcasing our dynamic, diverse destinations and inspiring visitors to put themselves in picture.

Tourism and the Creative Industries are both growth industries.

Global streaming platforms mean that programmes have a huge international reach and emotionally connected audiences, which we can tap into to drive visits now. The campaign's strength is that every location has a story to tell so it appeals to both destinations here and to international visitors.

As well as inspiring visitors to choose Britain, our campaign encourages our international visitors to explore more when they come. International visitors spent an estimated £32.5 billion in the UK in 2024, year-on-year

growth of 5 per cent, supporting our high streets and tourism businesses. We want to boost that spending across more of Britain, supporting jobs, businesses and driving growth for local economies.

**The UK has consistently ranked as one of the most influential nations in the Global Soft Power Index, with strengths in education, media, diplomacy, and governance. How does VisitBritain leverage the UK's global appeal in these areas to attract visitors and enhance the country's tourism appeal?**

Our international marketing campaigns are part of the UK government's GREAT brand, one of the world's most impactful nation branding and marketing initiatives. GREAT enhances the UK's global reputation and drives economic growth by encouraging international audiences to visit, study, trade, invest, live and work in the UK. Each of these sectors benefits from international reputation of the others, for example, those who have visited Britain are 16% more likely to invest in our businesses, products and services.

**We live in an increasingly competitive world and - despite these strengths - China has overtaken the UK in the Global Soft Power Index for the first time. What are the key priorities for VisitBritain in the coming years to future-proof the country's tourism appeal?**

Tourism is a competitive global industry and visitors have a lot

of choice. Britain always ranks highly for its history and heritage and contemporary culture and sport, but perceptions are not as strong for its perceived welcome, a top driver in destination choice.

To counter this VisitBritain's international GREAT campaigns showcase our welcome, inspiring visitors to discover more of Britain, stay longer and to come and visit not one day, but today.

Looking to policy matters, such as the introduction of the Electronic Travel Authorisation scheme and EU visitors now being required to travel using a passport rather than ID card, we are working hard to give visitors the clarity they need to book their trips with confidence.

Britain is seen as an expensive destination and value for money is a top driver for international travellers, alongside welcome, so we need to be as competitive and welcoming as possible to continue to attract visitors of future.



# London



**Rose Wangen-Jones**

Managing Director,  
Marketing, Destination  
and Commercial,  
London & Partners

## LONDON & PARTNERS

### London will soon launch a new strategy putting place at the heart of the city's economic agenda. How can cities leverage place brand perceptions to drive growth?

We are indeed soon launching London's Growth Plan for 2035, which sets out how we will grow the capital's economy to improve the lives of all Londoners, drive London's green transition, and support prosperity in London and across the UK. The importance of place runs through the plan, particularly the importance of enhancing London's brand perception as a polycentric city, with growth opportunities beyond central London.

One of the key drivers for London's economy is creating and promoting places for growth: for Londoners, visitors, businesses, and local communities. As part of the 2035 Growth Plan, we are enhancing London's place brand perceptions, from capitalising on our established strengths on education, culture, talent, and innovation to building more robustness in housing, affordability, and accessibility perceptions.

The strength of London's brand in these areas is the necessary backdrop that creates the platform for economic growth and competitiveness.

Yet we recognise growth priorities are set locally and are place-specific, so we are working with local councils to develop individual plans to create, develop, and

maximise relevant narratives for their place, in support of those local priorities and for the benefit of London's brand as a whole.

### Before focusing on outward place promotion, cities are being reminded by the necessity to prioritise dialogue with residents. How is London tackling the challenge of liveability whilst remaining attractive to global investors, talent, and travellers?

Londoners and their local businesses and communities are all at the heart of the 2035 Growth Plan. To foster growth we need to ensure Londoners remain a priority and feel content within the places they live and work.

It's not an either/or choice. Maintaining London's 'liveability' is important not only for our residents but for attracting top talent and ensuring visitors also have a positive and welcoming experience when spending time in our city.

We continue to build on London's liveability with exciting new developments and places that take this holistic view - from the Camden Highline, which will take over a disused train track in 2027, to the East Bank development in Stratford which will be home to a new V&A Museum, the 'V&A East Storehouse', BBC Music Studios, and new university campuses.

### With more opportunities open to investors, talent, and travellers, competition between cities is stronger than ever.

### How is London planning on maintaining its competitive edge against fast-growing powerhouses like Dubai and Singapore?

As part of the Growth Plan and the work we do at London & Partners promoting our city, we continue to focus on where London's strengths lie - from its diverse culture, people and heritage; to international tech investment; to our world-leading universities and colleges.

In addition to this, the plan focuses on enhancing areas in which we see potential for new growth, including sectors ranging from life sciences, AI, net zero, and robotics.

As well as placemaking, we are committed to attracting inclusive talent to grow London's workforce; backing entrepreneurs with investment and support; building housing and infrastructure; and generating inward investment to ensure London remains a leading choice for investors, talent, and visitors.

We continue to tell London's story and its strengths: most recently, the capital city has been ranked as one of the best cities for life sciences<sup>1</sup> and AI<sup>2</sup>, as well as green spaces<sup>3</sup> and culture<sup>4</sup>.

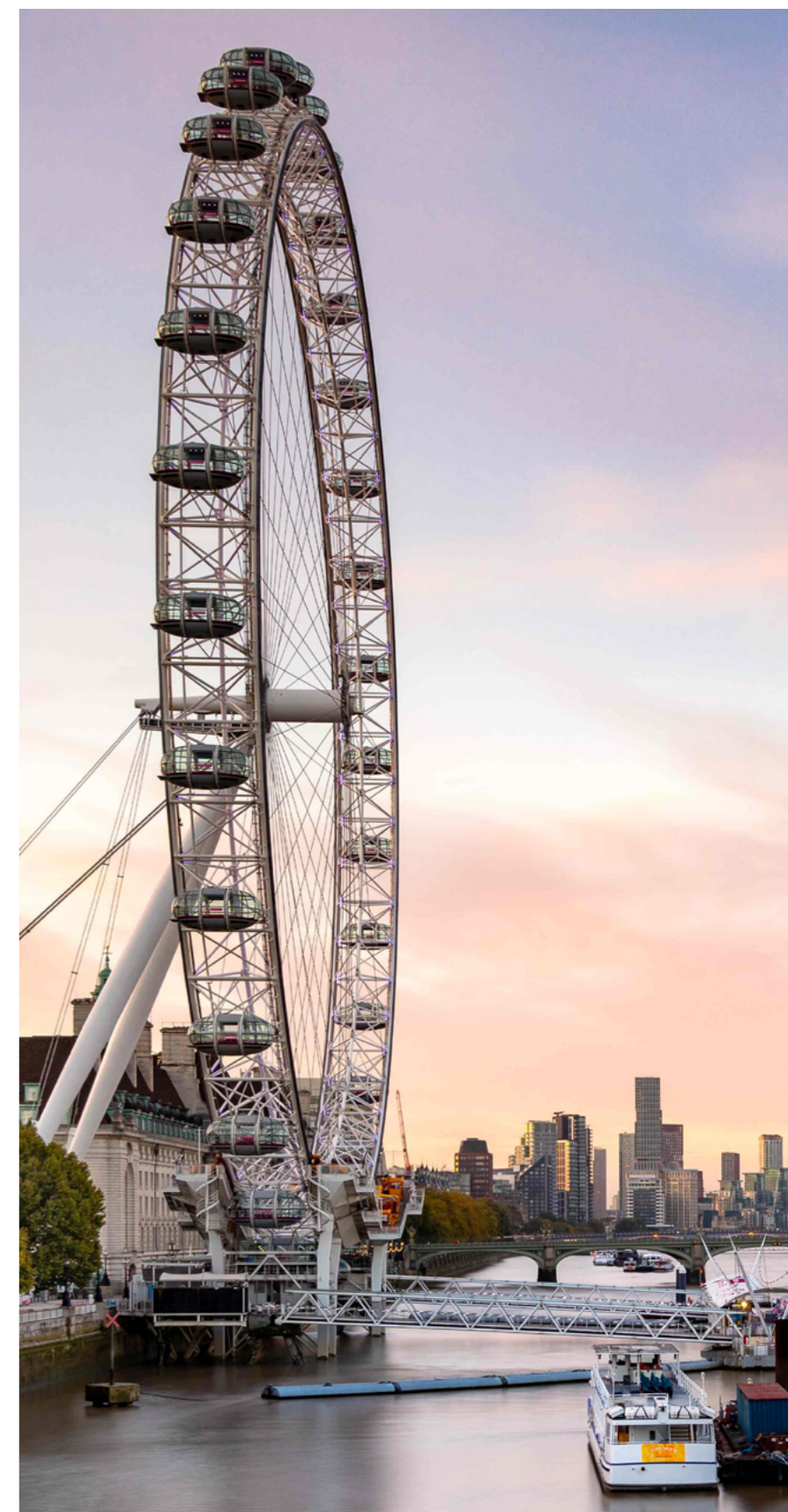
Source:

<sup>1</sup>London #1 in Europe for Life Sciences

<sup>2</sup>London leading global city for AI businesses to grow

<sup>3</sup>London named the greenest city in Europe - here's the rest of the top 10 - MyLondon

<sup>4</sup>London Named Top City For Culture In The World





03

**Expert  
Insights**

# Outstanding universal value: Preserving heritage protects our future



**Irina Bokova**  
Former Director-General,  
UNESCO

This year the United Nations Organisation for Education, Culture and Sciences (UNESCO), like the UN, will celebrate its 80<sup>th</sup> anniversary.

UNESCO was founded in London, at the Institute for Civil Engineering, as the first UN Specialised Agency, and was the expression of a different approach towards the post-war world reconstruction. The idea emerged in 1942, when the United Kingdom organised the first Conferences of Allied Ministers of Education, presided by Ms. Ellen Wilkinson, Minister of Education of the UK.

I always find this inspiring. The war was far from won. Despite everything, in the very midst of conflict, the UK and the allied forces were promoting cooperation in education, culture and science as a way to build lasting peace.

The term “Soft Power” was not coined yet, but the words of the UNESCO Constitution were a strong embodiment of the much-needed power priority shift: “Since wars start in the minds of men, it is in the minds of men that the defences of peace must be constructed.”

I find this even more inspiring today, amid the multiple crises we are living through, when multilateral “grammar” is slowly regressing and the balance of power is supplanting diplomacy and collaboration for the global public good.

During its 80 years, UNESCO has served as a global collaborative platform for intellectual debate, fostering partnerships, encouraging

the creation of knowledge and launching new ideas. This is how the concept of education for all, knowledge-based societies, expressions of cultural diversity, global citizenship education, ethics of science, ethics of climate change and now ethics of AI were born.

Among them, there is no other concept that captures in such a powerful and lasting manner the universality of humanity’s creativity as the World Heritage, embodied in the UNESCO Convention on World Cultural and Natural Heritage and one of the most widely ratified international legal instruments today.

With its 1223 sites, the World Heritage List is an open book of humanity’s common history and a powerful tool of intercultural dialogue and cultural diplomacy.

Based on the respect and recognition of the “outstanding universal value” of monuments, sites, temples, historic cities and landscapes that embrace all the diversity of humanity, the World Heritage is one of the most visionary and transformative ideas of the 20<sup>th</sup> century. This is the idea that national heritage belonging to different cultures may represent “outstanding universal value” for all and should be protected by international law.

Humanity stands united in all its diversity around shared values, and all cultures are different but that difference does not divide - it unites. When a World Heritage site is destroyed anywhere in the world, we are all diminished, even if it is from another region, another period, another culture, another religion.

The adoption of the concept of cultural heritage as having a “universal” value represented a monumental shift in the thinking about culture and arts as only a national identity expression.

It brought together the universal and the national, the global and the local, making a unique blend of values for cultural patrimony and visual arts all across time and space as heritage, belonging both to a unique culture as well as to all of humanity at the same time.

In the powerful lines of the Convention:

“Outstanding universal value means cultural and/or natural significance which is so exceptional as to transcend national boundaries and to be of common importance for present and future generations of all humanity. As such, the permanent protection of this heritage is of the highest importance to the international community as a whole”.

It is in sad moments that we come to appreciate the power of heritage to understand who we are and where we come from. The destruction of cultural heritage, what I called at the time “cultural cleansing” by extremists in the Middle East during the conflicts in Afghanistan, Mali, Syria and Iraq, not only shocked us profoundly, but made us revisit our relations with history, heritage, identity and common values.

The deliberate destruction of humanity’s cultural heritage and looting of cultural sites also brought about a new understanding about why culture matters and its link with peace and security. The adoption of UN Security Council Resolution 2347 of March 2017 broke new ground. It focused attention on culture and heritage preservation as a tool for peace and reconciliation, as well as the need for cultural “literacy” and intercultural dialogue.

And this is where “Soft Power” found its expression.

UNESCO helped save the temples of Nubia, in Egypt.

UNESCO rebuilt the old bridge of Mostar, in Bosnia and Herzegovina, destroyed during the war in ex-Yugoslavia.

UNESCO rebuilt all of the 14 mausoleums destroyed by extremists in Timbuktu, Mali.

Today UNESCO is rebuilding the “spirit of Mosul” in Iraq.

The rising importance of heritage protection reveals the role it plays in the “Soft Power” politics today, exacerbated by the geopolitics,

globalisation and connectivity. It is more than obvious that cultural diplomacy is becoming ever more important in the spectrum of both traditional and new tools of diplomatic and political interaction between countries – both as a tool of national diplomacy and as cultural diplomacy “beyond national borders” in the search of the “common global good.”

In every corner of the world, our common history is written into monuments and cities, in the arts and in traditions passed down through generations.

This history defines us, connects us, and shapes our future, but it is also under threat of being erased by time, conflict, and neglect. The preservation of cultural heritage is not just a task for a few—it’s a responsibility we all share, and the power of global collaboration can make the difference between remembering our past and heritage versus losing it forever.

Cultural heritage is not just about bricks and stones, but how we belong to each other. Our heritage holds our identities and connects us, and cultural sites where history lives on are also vital to the future of our common humanity.

# The challenge of media and misinformation



**Mitali Mukherjee**

Acting Director,  
Reuters Institute for  
the Study of Journalism,  
University of Oxford

At the start of 2025, two things happened almost simultaneously. For the second year running, the World Economic Forum (WEF) ranked misinformation and disinformation as the biggest near-term global risk to countries around the world.

Even as the Forum pointed to the danger of false and misleading content seriously harming the geopolitical environment, social media behemoth Meta, which owns platforms like Facebook and Instagram, announced that it would stop working with third-party fact-checking organizations.

The company believed its content moderation approach resulted too often in "censorship." Having built one of the most extensive partnerships with fact checkers after the 2016 presidential election, the company now believed it had resulted in "censorship" and "political bias."

For many years now, misinformation has been both a catch-all term to describe false and misleading information sloshing around on the internet and a useful tool by those in positions of power to disabuse news reportage that is critical of their actions.

The latter certainly plays on the minds of ordinary citizens, or in the case of journalism, wider audiences. Using the US as an example, research from the Reuters Institute's most

recent Digital News Report shows 72% of online news users in the US said they were concerned about what is real and what is fake on the internet – a jump of 8 points from the year before and higher than the 59% average across the 47 markets covered by our report. Across all countries, respondents said X and TikTok were the social media platforms where it was most difficult to discern trustworthy information.

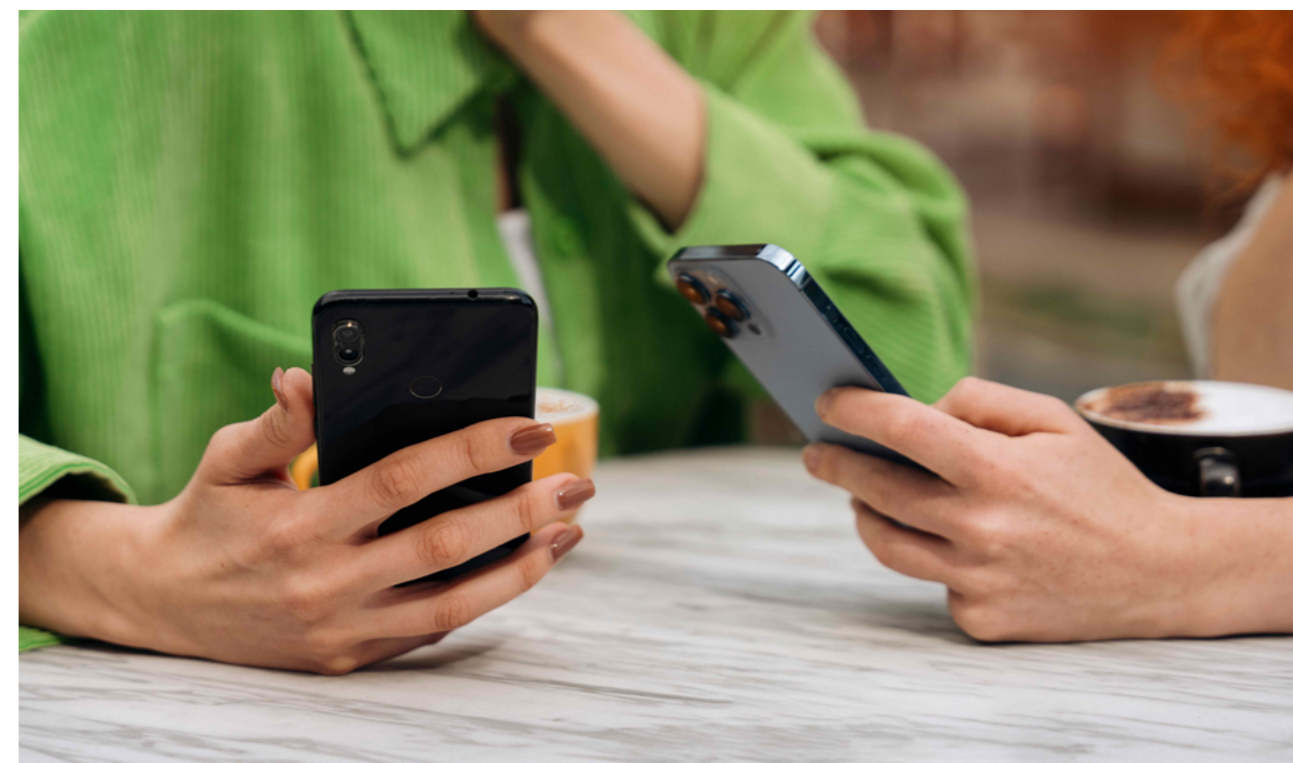
America is emerging from an intensely bitter election campaign with a new President who has shown scant regard for facts, prompting news organisations like the BBC to preface much of his commentary with the words 'without any evidence.'

It is no coincidence that the US remains an extremely polarised market for news. 2024 is a good starting point to break it down. It was a massive election year that saw more than sixty countries, representing a combined population of about 49% of the people in the world, vote.

Just like America, many of these countries witnessed vitriolic election campaigns that sought to divide communities, races and people. Elections are just one aspect of the growing dissonance between the wider public and political processes and that dissonance's effect on the lack of interest in news, perpetuating a view that 'news is misinformation.'

Research shows that audience concerns about misinformation are often driven less by news that is completely 'made up' and more about seeing opinions and agendas that they may disagree with, as well as journalism they regard as superficial and unsubstantiated. In recent times, topics that drew the most concern around 'fake or misleading' content was news about the wars in Ukraine and Gaza.

AI complicates the picture, but it isn't the biggest challenge. Across many markets and for many reasons, news has lost its connection with audiences. Tumultuous times increase the urgency for news publishers to find their way back.



For news makers, a few things are clear. Even predating the proliferation of social media and the internet, misinformation usually comes from the top. What that means is that false and potentially harmful ideas are often planted in the public consciousness by figures in positions of authority. For news organisations, reporting on the misinformation peddled by powerful actors may be a part of the job, but it is equally important to recognise misinformation doesn't exist in a bubble - it plays on existing schisms in society that play out as acts of communal hatred, racism, gender violence and class and caste divisions.

What can news publishers focus on to reestablish their connection with audiences, to communicate and cut through this misinformation haze? A few things come to mind. Editorial media must focus on producing relevant, engaging, and high-quality content that demonstrates the value of engaging with the news for audiences across class, culture, religion and gender. As an extension, it is vital that news reaches those who feel the most alienated by it: young people, ethnic minorities, socioeconomically disadvantaged groups, women. The list is long.

It is also a moment for progressive governments to examine their role in upholding the need for and importance of widespread, equitable access to information that provides the facts but also helps citizens make sense of large events and how they may impact their lives.

There is a need, more than ever to build and protect regulatory frameworks that protect journalists and editorial institutions, an endeavour made even more challenging in the current political environment.

Even as there continues to be massive funding thrown at AI, it is innovation for public good that needs support. Policy makers can provide this through funding, by removing obstacles to editorial innovation, and by ensuring that digital market regulations do not restrict editorial freedom.

Misinformation reflects the fissures that exist in our communities. If news makers focus on listening to their audiences and engaging with them, this approach has the potential to be the most effective way to repair the divisions, ultimately counteracting misinformation.

# Investing in the Nation Brand: The untapped potential of advertising spend for Soft Power



**Dagmara Szulce**  
Global Managing  
Director, International  
Advertising Association

As the world grows more interconnected and competitive, the concept of Soft Power is more vital than ever before.

Defined as the ability to shape preferences and influence behaviors through attraction and persuasion, Soft Power is a fundamental resource in international relations and may well be the key to national survival in the 21<sup>st</sup> century. As nations vie for influence and recognition on the global stage, advertising spend emerges as an essential component of nation branding. Yet, many governments are falling short on their investments, neglecting one of their most important assets: their national identity.

It is not an exaggeration to say that the disparity between nations that understand the power of brand promotion and those that do not could determine future global influence. Nation branding involves crafting a compelling image that resonates with foreign audiences, encompassing culture, values, and economic opportunities.

Surprisingly, national governments often allocate limited budgets to these initiatives, underestimating the visibility, influence, and economic benefits a cohesive brand can deliver. A lack of understanding regarding the connection between advertising spend and the value of a nation's brand may lead to missed opportunities that could enhance

international relationships, stimulate tourism, and attract investment.

For example, countries like Canada and New Zealand, allocate significant resources to marketing their brands as welcoming, progressive, and innovative. These nations recognize the competitive advantage a robust brand can afford them, both economically and socially. Indeed, nations that cultivate strong brands can shape international perceptions, foster goodwill, and create valuable connections worldwide. By contrast, many nations are losing ground in this race simply by failing to invest sufficiently in their own identity.

International organizations play an important role in guiding governments to understand best practices in nation branding and Soft Power. The International Advertising Association (IAA) acts as a global compass, helping policymakers and industry leaders navigate this rich field by highlighting successful strategies and innovative approaches.

The IAA provides a platform for the exchange of ideas and knowledge, amplifying the importance of structured branding efforts. Thanks to collaboration with Brand Finance, the IAA leverages annual indices that rank the world's highest-value nation brands. These reports dissect the strategies that propel certain countries to the forefront of international influence, providing critical insights for governments looking to enhance their own branding efforts. This partnership not only quantifies brand value but also educates governments on the opportunities that arise from effective branding, providing a roadmap for future investments and campaigns.

Understanding the dynamics behind successful nation brands can yield substantial economic benefits. Countries that prioritize building and maintaining their brand identities can expect improved tourism revenues, attract foreign direct investment, and heighten diplomatic ties. For businesses operating within these nations, a positive national image creates a favorable environment for growth. A powerful nation brand translates into



economic advantages for both the public and private sectors, highlighting the importance of investment in this area.

The need for international collaboration in sharing knowledge about branding cannot be underestimated. The IAA and Brand Finance exemplify how organizations can partner to provide critical intelligence about the best practices for building and sustaining successful nation brands. By analyzing the tactics employed by leading countries, other nations can adapt those insights to their unique contexts, thereby accelerating their branding initiatives. The economic implications are clear: nations that successfully cultivate their brands can sustain and enhance their competitiveness on the global stage.

The concepts of Soft Power and nation branding should not merely reside within the portfolios of diplomats and government officials; they should be integrated into broader

economic strategies. For smaller nations, or those with limited visibility, these insights can serve as game-changers, allowing them to stand out amid the noise of larger or more prominent players.

The importance of a well-funded and strategic advertising budget for nation branding will only grow. With geopolitical tensions, economic volatility, and the rise of populism shaping public sentiment around the world, the need for nations to project a positive and attractive image is paramount. This is not just about marketing - it is about survival and prosperity in a landscape that rewards those who are visible, relatable, and positioned strategically.

# From magnetism to the military: The relationship between Soft Power and politics



**Professor Michael Clarke**

Distinguished Fellow  
& Former Director-General,  
Royal United Services  
Institute (RUSI)

Critics of the concept of Soft Power normally show that they don't understand it very well. But neither do many who critique the unsubtle muscularity of so-called 'Hard Power' – so readily equated with military force.

The best analysts over the last century and a half who have been interested in 'power' as a fundamental reality of politics have well-understood that manifestations of power were best described with some subtlety.

And though the labelling of 'Soft Power' only goes back to the work of Joe Nye and others around the year 2000, the most distinguished earlier writers on 'power' like Reinhold Niebuhr, Hans Morgenthau, Martin Wight or Henry Kissinger were well aware of how 'softly' power could most effectively be exercised. They didn't bother to label it as Soft Power because for them that was implicit in the whole conception.

In part they didn't label it because these writers were part of a dominant western political culture, where the broader circumstances in which military, economic or diplomatic coercion was exercised were so obviously favourable – through things like international institutions and legitimacy, law, political consensus, control of 'the narrative' – that Soft Power didn't need to be labelled. It was the existential reality of the twentieth century world.

But Soft Power now deserves its label and more detailed study precisely because in the twenty-first century the formerly powerful states and societies can no longer take it for granted. They have woken up to the fact that those intangible elements such as international norms, culture, conceptions of law and legitimacy and the all-important 'narrative', are no longer existential facts of world politics but rather have become arenas of intense international competition in themselves.

So, it matters to recognise 'Soft Power' as an important part of fundamental 'power' in the contemporary world and at least seek to understand it better. Given the multitude of guises in which Soft Power can manifest itself, it remains a moot point whether or not it can be politically mobilised to some national advantage. But it deserves to be probed more deeply, if only to determine which manifestations of Soft Power might be promoted or else left well alone.

Two conclusions follow from this: one of theoretical importance, the other of very practical application.

Firstly, the theoretical imperative is to understand power as a spectrum among those players – let's say governments or societies – who relate to each other in multiple ways.

In themselves the 'instruments' of power are neither hard nor soft; it depends on how they are used. It is simplistic to assume that at the hard end of the spectrum all is military coercion; and at the soft end all is diplomatic persuasion. Any governmental levers of power could be used in a coercive – hard – way, not just those of direct military or economic pressure.

A government might threaten to cancel cultural exchanges, boycott the Olympics or the FIFA World Cup, revoke educational visas and so on. In 2020 the Chinese Government 'punished' Australia for its human rights criticisms in a number of cultural areas and engineered an effective boycott of many western brands in Chinese retail and service industry markets. Regardless of the actual instruments used, in other words, the Hard Power end

of the spectrum emphasises pressure and transactionalism, a direct attempt to influence the behaviour of another player. That's power projection.

The Soft Power end of the spectrum, by contrast, is characterised by power magnetism; demonstrating by its very existence a magnetism that often promotes imitation. Western military forces, for example, not only spend a lot of time performing Soft Power missions – humanitarian assistance, protocol operations, port visits and so on – but their demonstrable ability to fight wars also promotes a widespread desire to imitate them, in their structure, organisation, working practices and so on.

Because they are good at Hard Power when called upon to exercise it, they turn out to be a valuable Soft Power asset even when they are not. The natural magnetism of a society to the world outside has been shown to depend on a few key perceptions; is it a stable and lawful society?; is it prosperous?; is it a society of opportunity? And inside those grand generalisations are a multiplicity of cultural, institutional and commercial reputations that feed the national Soft Power magnet to sustain its strength.

Not least, the power spectrum is dynamic. Power exercised toward the harder end is normally inefficient unless it is backed up by many Soft Power elements. And Soft Power is demonstrably more magnetic when it arises from a source that has some ability to go towards the hard end of the spectrum in other circumstances.

Secondly, the practical application of understanding Soft Power better poses the knotty question of how far it can be mobilised to some national advantage. For years British governments have spent very little promoting Soft Power but still Britain has an enviable place in most global Soft Power rankings.

Other countries spend a great deal more but have not much improved their international Soft Power reputations in ways that really matter. But this situation may be changing fast as the global shifts in world power emphasise how quickly the dictators have become militarily

and economically coercive. When dictators equip themselves for the Hard Power end of the spectrum, they may get better value from their recent big investments in Soft Power, promoting their own society and its narratives.

For a free society competing on these terms, the imperative is to recognise the different levels of potential mobilisation of Soft Power assets.

Some are under the immediate or close control of government and can be promoted directly. Others depend on an arms-length relationship with government but can nevertheless benefit from a government's attention.

But the greatest and most important Soft Power assets grow freely from the free society from which they spring. In a world where democracy itself is now in peril, truly democratic governments have to think very carefully about how they interact with their own civil society and how they promote their own political culture.

That's not an argument about public money or scarce resources, so much as a better understanding of the ways government affects the fundamental institutions of the country. "Only those institutions are loved that touch the imagination," as the celebrated historian R. H. Tawney wrote long ago.



# Jump for the Planet: A mission to protect climate refugees



**Thomas Kozlowski**  
Initiator of the JUMP  
FOR THE PLANET  
Project

As a skydiver, trauma psychologist, and mountain rescuer, my life's mission is to support people who are unfairly impacted by fate.

In 2026, I will skydive from the edge of space (148,000 ft / 45 km) to draw global attention to the plight of climate refugees and the vital work of Jump for the Planet, a bold rescue initiative aimed at providing rapid relief to climate refugees. These are people who lose their homes in an instant due to climate disasters. My goal is to deliver modular shelters within hours, offering safety, a place to cook, and a secure place to rest after traumatic experiences.

Despite living on a borderless planet, humanity has built artificial divisions—lines on maps, walls, and barriers that isolate us from each other and our environment. Scientific data and statistics alone fail to reach most people, but social media has the power to mobilise change. That's why I am taking this leap—to engage a global audience in a conversation that truly matters.

My space dive aims to highlight how climate change endangers the most vulnerable communities. Beyond raising awareness, I am determined to secure over \$1 billion to fund rapidly deployable emergency shelters worldwide. Before stepping off the balloon at 45 km, I will have 30 minutes to share my message to a live audience via YouTube.

My dream is to instil in people a lasting awareness of our shared planetary identity—an "Overview Effect" that cuts through division and inspires a future of collective responsibility for our planet and each other.

The goal of this partnership with global social media is to directly broadcast the skydive from space to hundreds of millions of people who will watch this unusual event.

The mission, however, is all about using this extreme moment to send a message to humanity about the importance of our actions in protecting a planet that still has a chance to be a safe home for future generations at risk. The Global Soft Power Summit provides a unique opportunity for all nations to unite in an unprecedented way in the fight for the greater good, also to show that it takes doing something crazy today to stop the madness tomorrow!

More than 40 years ago, a shipyard worker Lech Walesa started the Solidarity revolution against the communist regime in isolated Poland. Today, as an internationally respected Nobel Peace Prize Laureate and former President of Poland, he is a patron of Jump For The Planet, believing that my crazy idea is the way to build a better tomorrow for our children

David Beaver, co-founder of The Overview Institute and The Center for Planetary Identity supports the campaign: "Jump for the Planet is a critical initiative at a time when humanity faces unprecedented challenges. Mr. Kozlowski's prior skydiving charity events have already made a difference, and this project quite literally takes those efforts to new heights."

We have achieved incredible things as a species, yet deep divisions persist. Now is the time to channel our differences into a powerful force for good. By uniting governments, organisations, and individuals, we can build a global movement driven by compassion and action.



# Soft Power is how the world will understand China



**Jay Cao**

London Bureau Chief,  
Phoenix Satellite TV

Professor Joseph S. Nye Jr. first coined the term "Soft Power" in his 1990 book "How To Lead," and as a journalist, I have had the honour of interviewing him twice.

We primarily discussed what changes are taking place in global Soft Power, the influence of the United States, and whether China has understood and mastered the value of its own Soft Power. We are in agreement - there is no definite answer at present, because the world situation is still developing, and the changes sometimes exceed our expectations.

Despite this ongoing uncertainty, the influence of China's Soft Power is still worthy of our attention. China is the world's second largest economy, which has an impact on peoples' livelihoods and societies in different regions of the world, but China also must understand how its influence is perceived in those various regions. That understanding is an opportunity for learning on both sides and can help avoid misunderstandings.

Traditionally, most people who have not personally travelled to China to experience local life have relied on satellite TV to learn about the country. For example, Phoenix Satellite TV, where I work, broadcast live in 1997 a Chinese man driving a motorcycle over the Hukou Waterfall of the Yellow River. This allowed global audiences to not only see unprecedented live stunts, but also appreciate

the magnificent natural scenery known as the "Mother River of China." Ten years later, in 2007, Phoenix Satellite TV cooperated with Sky News and China Shaanxi TV to jointly complete the exhibition "Qin Shi Huang: Terracotta Warriors of China" at the British Museum.

The exhibit attracted a large number of British people who were interested in the culture of the Qin Dynasty, including members of the British royal family.

From the era of satellite TV that emphasised large-screen broadcasting to the era of small-screen mobile clients, China's Soft Power communication has become more classified and personalised, while also adapting to the younger audience.

Even so, I hear from government officials and ordinary people in different countries in Africa, the Middle East and Europe that they want to know more about whether China is still adhering to its traditional values of hard work, family, friendship, and sharing their culture with the world.

I've been asked questions that indicate that the information about China obtained from media channels makes it difficult for them to distinguish between true and false. For example, does every Chinese household live a prosperous life? Do Chinese people think that "low-priced, low-quality, fast consumption" is the model that China should promote globally?

I'm also often told that the international communication power of Chinese media is very good, but the Chinese media's interpretation of the world has a very obvious "Chinese style." By this, they mean that the communications lack a unique perspective, criticism of its own problems, and in-depth understanding of other countries' societies.

In addition to media communication, the brand influence of Chinese companies is also a manifestation of China's Soft Power, from China's time-honoured liquor, inexpensive white appliances to cutting-edge technologies including artificial intelligence that lead the global market.



I believe that regularly evaluating the international brand value of wider variety of Chinese companies will not only communicate to the world what it means when goods are "Made in China" or "Designed in China," but also help Chinese companies realise that if they want to expand their influence in the international market, they must first gain sufficient strength in the face of global consensus and international standards, rather than talking to themselves and relying solely on one-way output of information to gain widespread recognition.

In the vast global market, there are still many companies that have misunderstandings on how to effectively apply the concept of Soft Power to actual market promotion.

But in fact, this is not surprising. Nearly two decades ago in 2006, Professor Joseph S. Nye Jr published an article encouraging readers to rethink Soft Power, proposing that it is wrong to rely on Hard Power or Soft Power alone. Nye suggested that they should be combined to create "smart power," and that the smart power approach is the optimal way to attach importance to alliances and partnerships and provide a country's goods to international market.

Then and now, enabling global community partners to benefit from Soft Power requires time and ongoing dialogue both inside China and around the world.

# Rising brand perceptions of emerging markets multinationals



**Dr Lourdes Casanova**

Cañizares Director, Emerging Markets Institute & Senior Lecturer, Samuel Curtis Johnson Graduate School of Management, Cornell University

The Emerging Markets Institute at Cornell University publishes a yearly report focusing on the growth of emerging market multinationals, defined as those with headquarters in an emerging market. If we look at metrics such as growth of gross domestic product per capita, poverty reduction, and life expectancy, emerging markets have done very well in the first quarter of the twenty first century. Parallel to this success, we have seen a growth in companies hailing from those countries.

In 1990, Fortune launched the Fortune Global 500, the list of the 500 biggest companies in the world based on revenues. The United States led the list with 167 companies, followed by Japan, a strong contender with 111 firms. The UK was a distant third, with 43 firms.

Five years later, in 1995, when Fortune added service companies to the Fortune Global 500, the number of Japanese entries reached 149 compared with 151 for the US, evidence of Japanese economic power in the 90s. Thirty years later, the US' strongest competitor is no longer Japan but China, signalling a shift in power.

The leaders of the 2024 list are 139 American firms and 128 from China but only 40 from Japan. The United States also dominates the list of the top 30 largest

companies while only six are emerging market multinational corporations (EMNCs), all from China: Sinopec Group, China National Petroleum, China State Construction Engineering, Industrial & Commercial Bank of China, and China Construction Bank.

Who are these newcomers? Initially, a low-price strategy was enough to fend off western competitors and solidify the place of Chinese (and Korean) firms in products like smartphones.

However, competing successfully globally requires soft power as well, for instance, strong brand recognition. As emerging market multinationals' market shares increased, so did their brand recognition and ability to set prices in line with companies hailing from developed markets. Noteworthy examples of efforts to increase brand recognition include Huawei's marketing campaigns in Europe and Gulf countries, including glitzy storefronts, and the advertising campaigns of Haier in Europe. This trend gained momentum even against the backdrop of the U.S.-China trade war. As Huawei fell prey to restrictions and penalties in the United States, it also increased its market share globally and became number two in the world in smartphones, competing with Apple and Korean Samsung. As expected, overall brand recognition of Chinese firms made headway according to Brand Finance research.

From 2010 to 2025, the United States has dominated the Brand Finance Global 500 ranking of the top 500 most valuable brands in the world, making up 39% of all the highest value brands, and its representation on the world stage increased by 7.4 percentage points. The growth of the U.S. brands mirrored the loss by other G-7 firms. The rising presence of the E20 (the biggest 20 countries according to the Emerging Markets Institute definition<sup>1</sup>), was mostly driven by Chinese firms whose share in the top 500 global brands increased from 4% of the list to 14%. Meanwhile, the share held by all other E20 nations decreased by 4.2 percentage points to 3%.

Emerging markets other than China have not done very well, overall.



According to Brand Finance 2025, Latin America's brand recognition has remained relatively flat, with only four brands featured among the most valuable 500 in the world while emerging markets in Asia, with the exception of India (15 brands), barely registered a few entries on the list in 2025.

The country which saw the largest drop in representation was Japan, with 18 fewer high-value brands in 2025 than at the start of the last decade. Increased competition with China in Asian markets and the consistent economic contraction over the last few decades could explain Japan's loss of high-value brands. European brands in general saw a decline in their top 500 brand representation. France still tops the UK and Germany in this ranking, with a total number of 35 brands in the top 500 in the 2025 list of top 500 brands. Italy remained stable throughout the previous decade, with thirteen major brands included in the 2025 list.

Many E20 countries either had no firms or just a few make the Brand Finance Global 500. Besides China, the most notable increase comes from India, rising through the ranks from 8 to 15 high-value brands over the past decade.

One could expect that firms from emerging markets will continue increasing their homegrown brand values in the next decade as their economies continue to grow. The perception of the quality of Japanese and then Korean products rose, and Chinese brands are following the same path, a trend expected to continue. The same pattern is unfolding in services, as the airlines outside of the US and Europe are perceived as increasingly higher quality.

What is still unknown is how better brand recognition will impact the low-cost business strategies of emerging market multinationals. Smartphones and television may provide clues as to how this will play out – some of the prices from emerging markets' brands increased, which in turn forced U.S. and European firms to offer products and services at lower prices and, in the end, question their internal strategies and long-term vision.

By combining lower price and soft power, Chinese firms have become serious competitors, eating into the traditional markets of advanced country firms as well as in emerging markets. The trend will likely continue as we can expect more soft power and brands from Chinese companies in the future.

Source:

<sup>1</sup>The Emerging Markets Institute established in 2016 the E20, a list of the largest 20 emerging economies in terms of nominal GDP selected on the basis of their GDP per capita, share in global trade and poverty levels.



05

**Global  
Soft Power  
Index 2025**

# Global Soft Power Index

The full breakdown of results by nation brand

Rank 2025	Rank 2024		Nation Brand	Region	Index Score 2025	Index Score Change	Index Score 2024	Brand Value 2025 (USD mn)	Brand Value Change	Brand Value 2024 (USD mn)	
1	1	=		United States	North America	79.5	+0.7	78.8	\$37,328,559	+15.7%	\$32,271,140
2	3	▲		China	Asia	72.8	+1.6	71.2	\$20,530,402	+2.9%	\$19,960,020
3	2	▼		United Kingdom	Europe	72.4	+0.6	71.8	\$4,446,486	+10.1%	\$4,036,790
4	4	=		Japan	Asia	71.5	+0.9	70.6	\$4,210,121	-4.4%	\$4,406,090
5	5	=		Germany	Europe	70.1	+0.3	69.8	\$5,000,069	+0.3%	\$4,985,350
6	6	=		France	Europe	68.5	+1.2	67.3	\$3,886,788	+10.3%	\$3,522,360
7	7	=		Canada	North America	65.2	+0.8	64.4	\$2,729,373	+2.2%	\$2,670,820
8	8	=		Switzerland	Europe	64.9	+2.0	62.9	\$1,143,210	+7.3%	\$1,065,370
9	9	=		Italy	Europe	62.4	+0.4	62.0	\$2,403,023	+3.3%	\$2,326,270
10	10	=		United Arab Emirates	MENA	60.4	+0.7	59.7	\$1,223,085	+15.2%	\$1,061,770
11	12	▲		Sweden	Europe	60.3	+1.3	59.0	\$858,484	+4.5%	\$821,640
12	15	▲		South Korea	Asia	60.2	+2.2	58.0	\$1,994,166	+3.0%	\$1,936,760
13	11	▼		Spain	Europe	59.7	+0.5	59.2	\$2,218,313	+26.4%	\$1,755,090
14	13	▼		Australia	Oceania	59.6	+1.0	58.6	\$2,018,241	+12.6%	\$1,792,610
15	14	▼		Netherlands	Europe	58.7	+0.5	58.2	\$1,547,366	+11.3%	\$1,390,120
16	16	=		Russia	Europe	58.1	+0.4	57.7	\$806,698	+15.6%	\$698,080
17	17	=		Norway	Europe	56.8	-	56.8	\$550,613	-6.1%	\$586,230
18	19	▲		Denmark	Europe	56.5	+1.0	55.5	\$531,169	-9.5%	\$586,740
19	20	▲		Belgium	Europe	56.0	+0.8	55.2	\$794,848	+6.8%	\$744,340
20	18	▼		Saudi Arabia	MENA	55.6	-0.4	56.0	\$1,189,529	+14.3%	\$1,040,470
21	22	▲		Singapore	Asia	55.6	+1.2	54.4	\$824,156	+17.0%	\$704,210
22	21	▼		Qatar	MENA	54.5	-	54.5	\$270,390	-	\$270,370
23	24	▲		Finland	Europe	54.5	+0.6	53.9	\$374,753	+5.3%	\$355,880
24	23	▼		Austria	Europe	53.9	-0.3	54.2	\$620,810	+3.9%	\$597,790
25	26	▲		New Zealand	Oceania	53.1	+0.6	52.5	\$292,253	+16.8%	\$250,210

\* All data points have been rounded to the first decimal place.

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Nation Brand	Familiarity	Reputation	Influence	Business & Trade	International Relations	Education & Science	Culture & Heritage	Governance	Media & Communication	Sustainable Future	People & Values	Medals
	9.4	7.2	8.0	9.2	8.9	9.2	7.3	5.8	6.8	6.0	4.4	15
	8.8	6.8	7.6	8.8	7.5	8.6	6.1	5.1	4.6	5.7	4.0	9
	8.9	7.5	6.7	8.3	8.3	7.3	6.9	6.4	6.0	6.1	5.0	14
	8.6	7.7	6.1	9.2	7.0	8.7	7.0	6.5	4.6	7.2	5.7	14
	8.8	7.4	6.2	8.9	7.9	7.5	5.8	6.4	4.8	6.7	4.9	8
	9.0	7.2	6.2	8.0	7.7	6.2	8.0	5.3	5.1	5.7	4.8	6
	8.5	7.6	5.7	7.9	6.8	6.3	5.1	6.4	4.6	6.3	5.8	14
	7.9	7.8	5.3	8.7	6.9	6.2	5.5	6.8	4.4	6.7	5.9	19
	8.7	7.4	5.5	7.3	6.0	4.8	8.1	4.5	4.3	4.8	5.5	7
	6.6	7.1	5.9	7.8	6.3	5.3	4.6	5.4	4.2	5.2	4.6	1
	7.2	7.4	4.7	8.0	6.3	6.0	5.2	6.3	4.1	6.7	5.7	10
	7.6	6.8	5.1	7.6	5.5	7.0	6.0	5.1	4.3	5.6	4.8	0
	8.4	7.3	5.4	6.5	5.7	4.5	7.0	4.5	4.3	4.8	5.4	3
	8.1	7.5	4.8	7.3	6.0	5.6	5.3	5.7	4.2	6.0	5.5	2
	7.3	7.3	4.8	7.5	5.9	5.5	5.3	5.7	4.0	6.4	5.4	1
	8.5	5.6	6.3	5.5	6.1	6.3	4.2	4.2	4.2	3.9	3.2	1
	6.7	7.4	4.5	7.3	5.8	5.6	4.7	6.1	3.9	6.5	5.6	2
	6.8	7.2	4.5	7.4	5.8	5.5	4.8	5.8	3.9	6.3	5.4	0
	7.0	7.1	4.8	6.9	5.9	5.1	4.8	5.3	3.8	5.6	5.0	0
	6.8	6.5	5.7	6.7	6.2	4.3	3.8	4.6	3.8	4.5	4.0	0
	6.4	7.2	4.6	7.4	5.1	5.8	4.6	5.5	3.9	5.6	5.0	0
	6.0	6.9	5.2	6.8	5.8	4.8	4.0	4.9	3.9	4.8	4.3	0
	6.4	7.3	4.2	7.0	5.5	5.5	4.5	5.9	3.9	6.2	5.6	1
	6.6	7.1	4.4	6.7	5.4	5.0	5.1	5.2	3.7	5.4	5.0	0
	6.7	7.2	4.2	6.6	5.0	4.8	4.6	5.5	3.9	5.7	5.4	0

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● Gold digits | 1<sup>st</sup> in Class ● Silver digits | 2<sup>nd</sup> in Class ● Bronze digits | 3<sup>rd</sup> in Class

Rank 2025	Rank 2024		Nation Brand	Region	Index Score 2025	Index Score Change	Index Score 2024	Brand Value 2025 (USD mn)	Brand Value Change	Brand Value 2024 (USD mn)
26	25	▼	Türkiye	Europe	52.9	-0.8	53.7	\$455,253	-8.3%	\$496,420
27	27	=	Portugal	Europe	51.1	+1.0	50.1	\$295,884	+11.9%	\$264,410
28	28	=	Ireland	Europe	50.5	+0.6	49.9	\$742,827	-13.1%	\$854,400
29	30	▲	Luxembourg	Europe	50.0	+1.0	49.0	\$135,448	+7.4%	\$126,120
30	29	▼	India	Asia	49.8	-	49.8	\$2,770,819	-5.9%	\$2,944,480
31	31	=	Brazil	LATAM	48.8	-	48.8	\$974,485	+6.9%	\$911,210
32	33	▲	Poland	Europe	48.7	+0.1	48.6	\$1,061,190	+22.9%	\$863,580
33	32	▼	Israel	MENA	47.8	-0.9	48.7	\$409,585	-1.2%	\$414,380
34	36	▲	Greece	Europe	46.8	+1.2	45.6	\$140,080	+18.3%	\$118,440
35	34	▼	Iceland	Europe	46.2	+0.4	45.8	\$33,920	+4.0%	\$32,600
36	35	▼	Malaysia	Asia	46.1	+0.4	45.7	\$568,874	+9.9%	\$517,690
37	42	▲	Monaco	Europe	45.9	+2.1	43.8	\$7,570	+5.7%	\$7,160
38	39	▲	Egypt	MENA	45.4	+0.5	44.9	\$442,886	+4.4%	\$424,160
39	40	▲	Thailand	Asia	45.4	+0.6	44.8	\$531,090	+5.1%	\$505,430
40	37	▼	Kuwait	MENA	45.3	-	45.3	\$146,686	-3.6%	\$152,210
41	43	▲	South Africa	Sub-Saharan Africa	44.9	+1.2	43.7	\$214,673	+3.3%	\$207,900
42	38	▼	Argentina	LATAM	44.7	-0.3	45.0	\$231,257	-5.1%	\$243,690
43	41	▼	Mexico	LATAM	44.3	+0.3	44.0	\$1,041,723	+1.0%	\$1,031,630
44	46	▲	Czechia	Europe	43.5	+1.2	42.3	\$451,512	-0.6%	\$454,390
45	45	=	Indonesia	Asia	42.9	+0.3	42.6	\$1,090,505	+3.5%	\$1,053,270
46	44	▼	Ukraine	Europe	42.0	-1.0	43.0	\$101,459	+2.4%	\$99,040
47	48	▲	Hungary	Europe	41.9	+0.5	41.4	\$261,172	+22.3%	\$213,630
48	47	▼	Croatia	Europe	41.2	-0.6	41.8	\$59,033	+8.7%	\$54,290
49	49	=	Oman	MENA	40.8	+0.2	40.6	\$51,486	+6.7%	\$48,260
50	50	=	Morocco	MENA	40.6	-	40.6	\$99,391	+13.9%	\$87,290

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Nation Brand	Familiarity	Reputation	Influence	Business & Trade	International Relations	Education & Science	Culture & Heritage	Governance	Media & Communication	Sustainable Future	People & Values	Medals
	7.4	6.5	5.3	5.6	5.3	3.8	5.6	3.8	3.7	3.6	4.3	0
	7.5	7.0	4.5	5.4	4.6	3.8	5.4	4.1	3.7	4.3	5.1	0
	6.6	6.9	4.0	6.1	4.8	4.5	4.7	4.7	3.7	5.0	5.2	0
	4.7	7.1	4.1	6.6	5.2	4.8	4.2	5.4	3.7	5.5	4.9	0
	7.9	5.8	5.2	4.6	4.4	4.6	5.6	2.7	3.1	2.8	3.5	1
	8.0	6.5	4.7	4.6	4.2	3.1	5.4	2.8	3.5	3.5	4.7	2
	6.6	6.6	4.3	5.3	4.9	4.2	4.2	4.3	3.5	4.4	4.6	0
	7.3	5.0	5.0	4.6	4.9	5.1	3.2	3.2	3.7	3.3	2.9	0
	7.4	6.6	4.0	4.5	4.0	3.4	6.0	3.5	3.1	3.9	4.8	2
	5.8	6.9	3.5	5.5	4.2	4.3	4.0	5.0	3.4	5.5	5.1	0
	5.8	6.5	4.2	5.3	4.0	4.0	4.0	3.9	3.3	4.1	4.6	0
	4.8	6.8	3.5	6.2	4.5	3.8	4.8	4.8	3.6	4.3	4.6	0
	7.7	6.2	4.3	3.9	4.2	3.1	4.9	2.9	3.2	3.0	3.7	1
	7.0	6.4	4.1	4.8	3.5	3.2	5.1	3.0	3.2	3.5	4.7	0
	5.0	6.2	4.5	5.5	4.6	3.6	3.2	4.0	3.2	3.7	3.7	0
	6.8	6.1	4.5	4.2	4.2	3.2	3.9	3.1	3.3	3.4	3.7	0
	7.5	6.4	4.2	3.8	3.8	3.0	4.7	3.0	3.4	3.2	4.2	1
	7.6	5.9	4.1	4.1	3.6	2.9	5.5	2.5	3.3	3.0	4.2	1
	5.1	6.4	3.8	4.9	4.2	3.8	4.2	3.7	3.2	4.1	4.3	0
	6.0	6.2	3.8	4.5	3.8	3.4	4.1	3.3	3.1	3.6	4.5	0
	7.4	5.4	4.6	2.8	3.8	3.1	2.7	2.8	3.5	2.7	3.1	0
	5.4	6.1	3.8	4.3	3.9	3.4	3.9	3.6	3.0	3.8	4.0	0
	5.4	6.4	3.6	4.1	3.7	3.4	4.0	3.5	3.0	3.7	4.3	0
	3.8	5.9	3.8	4.7	4.2	3.2	3.4	4.0	3.2	3.8	4.4	0
	5.9	6.0	3.8	3.8	3.5	2.9	4.4	3.0	2.9	3.1	4.2	0

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Rank 2025	Rank 2024		Nation Brand	Region	Index Score 2025	Index Score Change	Index Score 2024	Brand Value 2025 (USD mn)	Brand Value Change	Brand Value 2024 (USD mn)
51	51	=	Bahrain	MENA	40.4	+0.4	40.0	\$28,362	+3.3%	\$27,450
52	53	▲	Vietnam	Asia	39.9	+0.3	39.6	\$519,623	+2.5%	\$507,060
53	52	▼	Philippines	Asia	39.9	+0.1	39.8	\$628,149	+19.5%	\$525,620
54	59	▲	Chile	LATAM	39.5	+0.7	38.8	\$284,641	+4.6%	\$272,150
55	58	▲	Romania	Europe	39.5	+0.7	38.8	\$232,608	+7.7%	\$215,950
56	56	=	Slovenia	Europe	39.5	+0.5	39.0	\$99,161	+8.7%	\$91,220
57	55	▼	Maldives	Asia	39.3	+0.1	39.2	\$3,650	-	\$3,650
58	63	▲	Jordan	MENA	39.1	+0.6	38.5	\$30,400	+9.3%	\$27,810
59	54	▼	Georgia	Europe	39.1	-0.2	39.3	\$26,440	+11.7%	\$23,660
60	60	=	Slovakia	Europe	39.0	+0.2	38.8	\$133,588	+3.9%	\$128,560
61	69	▲	Colombia	LATAM	39.0	+1.4	37.6	\$260,789	+5.1%	\$248,160
62	62	=	Iran	MENA	38.9	+0.4	38.5	\$211,538	+7.9%	\$196,000
63	65	▲	Cyprus	Europe	38.9	+0.9	38.0	\$32,945	+19.5%	\$27,580
64	67	▲	Panama	LATAM	38.7	+0.8	37.9	\$68,410	+6.1%	\$64,460
65	57	▼	Estonia	Europe	38.3	-0.6	38.9	\$50,475	-0.1%	\$50,550
66	68	▲	Malta	Europe	37.9	-	37.9	\$19,897	+25.4%	\$15,870
67	66	▼	Uruguay	LATAM	37.7	-0.2	37.9	\$77,259	+17.5%	\$65,780
68	64	▼	Bulgaria	Europe	37.7	-0.4	38.1	\$101,199	+16.8%	\$86,630
69	75	▲	Serbia	Europe	37.4	+0.7	36.7	\$72,480	+5.5%	\$68,710
70	61	▼	Lithuania	Europe	37.4	-1.2	38.6	\$68,672	+0.5%	\$68,320
71	70	▼	Costa Rica	LATAM	37.1	-0.4	37.5	\$42,680	+9.9%	\$38,820
72	72	=	Peru	LATAM	36.7	-0.3	37.0	\$156,901	-11.5%	\$177,190
73	74	▲	Cuba	LATAM	36.7	-0.1	36.8	\$40,840	-4.6%	\$42,800
74	88	▲	Bahamas	LATAM	36.6	+1.7	34.9	\$9,750	+7.1%	\$9,100
75	76	▲	North Korea	Asia	36.5	-0.2	36.7	-	-	-

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Nation Brand	Familiarity	Reputation	Influence	Business & Trade	International Relations	Education & Science	Culture & Heritage	Governance	Media & Communication	Sustainable Future	People & Values	Medals
	3.6	5.8	3.8	4.8	4.2	3.3	3.2	3.8	3.2	3.7	4.1	0
	6.2	5.8	3.7	4.0	3.3	3.0	3.7	2.8	2.9	3.0	3.9	0
	6.2	5.9	3.6	3.7	3.3	2.9	3.9	2.7	3.0	3.2	4.4	0
	5.4	5.9	3.5	4.0	3.5	3.1	3.9	3.0	3.2	3.5	4.2	0
	5.4	5.9	3.5	3.8	3.6	3.3	3.7	3.2	3.0	3.5	3.9	0
	4.0	6.1	3.6	4.2	3.7	3.4	3.5	3.5	3.3	4.0	4.2	0
	4.8	6.6	3.4	4.0	3.1	2.8	4.0	3.0	3.2	3.6	4.7	0
	4.7	5.7	3.7	3.9	4.0	3.1	3.5	3.4	3.2	3.2	3.9	0
	4.2	6.0	3.5	3.9	3.6	3.3	4.1	3.2	3.3	3.6	4.3	0
	4.3	6.1	3.6	3.9	3.5	3.5	3.4	3.3	3.0	3.7	4.0	0
	6.2	5.4	3.7	3.6	3.2	2.6	4.1	2.4	3.2	3.0	4.1	0
	6.6	4.6	4.3	3.1	3.8	3.1	2.6	2.5	2.9	2.5	2.5	0
	4.0	6.2	3.5	4.2	3.4	3.0	4.0	3.3	3.0	3.5	4.3	0
	4.3	5.9	3.7	4.2	3.7	3.0	3.2	2.9	3.1	3.4	3.9	0
	3.4	5.8	3.4	4.3	3.9	3.7	3.3	3.7	3.3	4.0	4.1	0
	3.6	6.1	3.2	4.3	3.5	3.1	3.9	3.6	3.1	3.7	4.6	0
	4.8	6.0	3.4	3.6	3.5	2.8	3.5	3.0	3.0	3.2	4.3	0
	4.8	5.9	3.4	3.7	3.4	3.1	3.5	3.1	2.9	3.4	4.0	0
	4.7	5.7	3.5	3.4	3.5	3.1	3.3	2.9	3.2	3.3	3.8	0
	3.7	5.8	3.4	3.9	3.7	3.2	3.2	3.5	3.1	3.7	3.9	0
	4.5	5.9	3.2	3.7	3.3	2.8	3.8	2.9	3.0	3.4	4.5	0
	5.2	5.7	3.3	3.3	3.1	2.7	4.0	2.5	2.9	3.0	4.1	0
	6.0	5.2	3.6	2.9	3.0	2.7	3.6	2.4	2.6	2.5	3.9	0
	3.7	6.2	3.1	3.9	3.3	2.8	4.1	3.1	3.0	3.4	4.5	0
	7.0	4.1	3.6	3.2	3.2	3.6	2.2	2.9	2.5	2.7	2.2	0

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Rank 2025	Rank 2024		Nation Brand	Region	Index Score 2025	Index Score Change	Index Score 2024	Brand Value 2025 (USD mn)	Brand Value Change	Brand Value 2024 (USD mn)
76	71	▼		Europe	36.5	-0.7	37.2	\$46,092	+6.4%	\$43,300
77	79	▲		Sub-Saharan Africa	36.4	+0.1	36.3	\$140,900	-14.9%	\$165,640
78	73	▼		MENA	36.4	-0.4	36.8	\$105,935	+21.8%	\$86,940
79	77	▼		MENA	36.3	-0.3	36.6	\$22,893	+21.3%	\$18,880
80	87	▲		Europe	36.2	+1.2	35.0	\$35,550	-19.9%	\$44,360
81	84	▲		Europe	36.0	+0.7	35.3	\$41,410	+4.2%	\$39,750
82	117	▲		LATAM	35.8	+3.2	32.6	\$13,210	+1.3%	\$13,040
83	83	=		LATAM	35.8	+0.3	35.5	\$104,930	+11.1%	\$94,410
84	78	▼		LATAM	35.5	-0.8	36.3	\$37,620	+3.7%	\$36,280
85	82	▼		Europe	35.4	-0.1	35.5	\$9,320	+6.0%	\$8,790
86	90	▲		LATAM	35.3	+0.5	34.8	\$10,960	+2.2%	\$10,720
87	80	▼		Asia	35.1	-0.8	35.9	\$261,805	+13.1%	\$231,570
88	81	▼		Asia	35.0	-0.6	35.6	\$239,142	+9.0%	\$219,440
89	86	▼		LATAM	35.0	-	35.0	\$47,397	+6.5%	\$44,490
90	85	▼		Sub-Saharan Africa	34.8	-0.3	35.1	\$34,030	-20.6%	\$42,870
91	91	=		MENA	34.7	-0.1	34.8	\$8,260	-4.7%	\$8,670
92	95	▲		Sub-Saharan Africa	34.4	-0.2	34.6	\$62,680	+20.7%	\$51,930
93	106	▲		Europe	34.2	+0.7	33.5	\$18,960	+6.6%	\$17,790
94	108	▲		Sub-Saharan Africa	34.1	+0.9	33.2	\$58,920	+15.9%	\$50,840
95	93	▼		Sub-Saharan Africa	34.0	-0.7	34.7	\$37,610	-4.5%	\$39,380
96	89	▼		LATAM	33.7	-1.2	34.9	\$37,492	+7.6%	\$34,840
97	98	▲		Asia	33.6	-0.7	34.3	\$46,270	-2.5%	\$47,450
98	99	▲		MENA	33.6	-0.6	34.2	\$68,757	-0.1%	\$68,830
99	101	▲		Asia	33.6	-0.5	34.1	\$138,390	+25.5%	\$110,270
100	92	▼		Europe	33.6	-1.1	34.7	\$15,910	+17.5%	\$13,540

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Nation Brand	Familiarity	Reputation	Influence	Business & Trade	International Relations	Education & Science	Culture & Heritage	Governance	Media & Communication	Sustainable Future	People & Values	Medals
	3.3	5.6	3.4	3.9	3.6	3.2	3.1	3.4	3.0	3.8	3.8	0
	5.6	5.3	3.8	2.9	3.0	2.4	3.3	2.1	3.0	2.6	3.3	0
	4.8	5.5	3.5	3.2	3.5	2.7	3.2	2.9	2.9	3.0	3.8	0
	4.6	5.7	3.5	3.3	3.1	2.7	3.7	2.7	2.9	3.0	4.0	0
	4.1	5.1	3.5	3.6	3.5	3.2	3.0	3.0	3.0	3.1	3.6	0
	3.5	5.5	3.5	3.5	3.5	2.8	3.6	3.2	2.9	3.1	4.0	0
	3.5	5.4	3.3	3.5	3.7	2.9	3.1	3.8	3.4	3.2	4.0	0
	4.2	5.8	3.2	3.5	3.2	2.7	3.8	2.8	3.0	2.9	4.3	0
	4.2	5.7	3.3	3.4	3.2	2.9	3.1	2.7	2.9	3.0	3.9	0
	2.5	5.6	2.8	5.1	3.5	3.3	2.8	4.2	2.7	3.9	3.8	0
	5.4	5.8	3.1	2.9	2.7	2.2	4.5	2.2	2.8	2.7	4.4	0
	4.1	5.5	3.4	3.3	3.1	2.8	3.0	2.8	2.9	3.0	3.7	0
	6.2	4.8	3.6	2.7	3.2	2.5	2.7	2.2	2.7	2.3	2.8	0
	4.4	5.5	3.3	3.2	3.2	2.7	3.3	2.5	2.9	3.1	3.9	0
	4.3	5.4	3.4	3.0	3.1	2.5	3.2	2.7	2.9	3.0	3.8	0
	5.2	5.0	3.7	2.6	2.9	2.3	3.2	2.1	3.0	2.4	3.3	0
	5.0	5.5	3.4	2.9	2.9	2.3	3.1	2.2	2.7	2.8	3.6	0
	3.7	5.4	3.2	3.1	3.3	2.9	3.5	2.8	2.9	3.1	3.8	0
	3.6	5.5	3.4	3.1	3.1	2.4	3.4	2.4	2.9	2.9	3.7	0
	3.7	5.5	3.3	3.0	3.0	2.3	3.1	2.7	2.9	3.0	3.9	0
	5.5	4.9	3.6	2.6	2.6	2.2	3.0	2.0	2.5	2.3	3.3	0
	4.6	5.4	3.2	2.9	2.8	2.4	3.3	2.4	2.6	2.8	3.5	0
	6.6	4.4	3.6	2.3	2.9	2.3	2.2	2.0	2.4	2.1	2.4	0
	3.7	5.3	3.2	3.1	3.1	2.6	3.3	2.7	2.8	2.9	3.8	0
	3.9	5.4	3.1	3.0	3.1	2.9	3.0	2.7	2.8	3.0	3.7	0

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Rank 2025	Rank 2024	Nation Brand	Region	Index Score 2025	Index Score Change	Index Score 2024	Brand Value 2025 (USD mn)	Brand Value Change	Brand Value 2024 (USD mn)
101	105	Nepal	Asia	33.5	-0.3	33.8	\$28,450	+2.1%	\$27,870
102	94	Senegal	Sub-Saharan Africa	33.5	-1.1	34.6	\$17,250	+22.0%	\$14,140
103	100	Bolivia	LATAM	33.4	-0.8	34.2	\$19,790	+1.2%	\$19,560
104	96	Bangladesh	Asia	33.4	-1.2	34.6	\$404,200	-23.7%	\$529,750
105	97	Mauritius	Sub-Saharan Africa	33.3	-1.0	34.3	\$14,720	+18.5%	\$12,420
106	103	Madagascar	Sub-Saharan Africa	32.8	-1.1	33.9	\$8,520	+4.5%	\$8,150
107	102	Montenegro	Europe	32.6	-1.4	34.0	\$4,600	+18.3%	\$3,890
108	122	Mongolia	Asia	32.4	+0.4	32.0	\$13,630	+1.5%	\$13,430
109	104	Rwanda	Sub-Saharan Africa	32.3	-1.6	33.9	\$7,450	-1.1%	\$7,530
110	110	Cameroon	Sub-Saharan Africa	32.3	-0.9	33.2	\$17,730	+10.1%	\$16,100
111	115	Ethiopia	Sub-Saharan Africa	32.1	-0.6	32.7	\$48,320	-11.1%	\$54,370
112	111	Bosnia and Herzegovina	Europe	32.1	-1.0	33.1	\$16,510	+7.1%	\$15,410
113	112	Cambodia	Asia	31.9	-0.9	32.8	\$20,220	+12.8%	\$17,920
114	128	Andorra	Europe	31.8	+0.4	31.4	\$2,750	+5.4%	\$2,610
115	113	Zambia	Sub-Saharan Africa	31.6	-1.2	32.8	\$12,340	-7.3%	\$13,310
116	119	Central African Republic	Sub-Saharan Africa	31.5	-0.9	32.4	\$1,350	+4.7%	\$1,290
117	123	Bhutan	Asia	31.5	-0.2	31.7	\$1,670	+25.6%	\$1,330
118	107	Brunei Darussalam	Asia	31.4	-1.9	33.3	\$6,910	+5.8%	\$6,530
119	109	North Macedonia	Europe	31.3	-1.9	33.2	\$10,150	+2.4%	\$9,910
120	126	Guatemala	LATAM	31.2	-0.3	31.5	\$81,300	+15.9%	\$70,140
121	121	Uganda	Sub-Saharan Africa	31.2	-0.8	32.0	\$29,050	+8.9%	\$26,680
122	149	Yemen	MENA	31.0	+2.2	28.8	\$10,380	-27.9%	\$14,390
123	133	Namibia	Sub-Saharan Africa	30.9	+0.4	30.5	\$6,140	+24.0%	\$4,950
124	114	Democratic Republic of the Congo	Sub-Saharan Africa	30.7	-2.1	32.8	\$36,390	+3.1%	\$35,290
125	127	Zimbabwe	Sub-Saharan Africa	30.7	-0.8	31.5	\$9,810	-41.0%	\$16,620

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Nation Brand	Familiarity	Reputation	Influence	Business & Trade	International Relations	Education & Science	Culture & Heritage	Governance	Media & Communication	Sustainable Future	People & Values	Medals
	4.6	5.6	3.0	2.8	2.9	2.4	3.4	2.6	2.7	2.9	4.2	0
	4.0	5.4	3.3	2.8	3.1	2.4	3.2	2.6	2.7	2.8	3.8	0
	4.0	5.2	3.2	2.9	3.1	2.6	3.0	2.4	2.9	2.9	3.7	0
	4.9	5.0	3.4	3.0	2.8	2.3	2.6	2.2	2.6	2.5	3.1	0
	2.9	5.6	3.0	3.3	3.0	2.8	3.4	2.8	3.0	3.2	4.0	0
	4.1	5.8	2.9	2.9	2.9	2.4	3.3	2.5	2.5	3.2	4.1	0
	2.9	5.3	3.0	3.1	3.1	2.7	3.3	2.7	2.9	3.0	3.7	0
	4.4	5.4	2.8	2.8	2.8	2.4	3.1	2.6	2.7	2.9	3.7	0
	3.4	5.0	3.3	2.8	3.0	2.3	2.7	2.8	2.5	3.3	3.4	0
	4.2	5.4	3.2	2.6	2.8	2.2	2.8	2.2	2.6	2.5	3.5	0
	4.7	5.2	3.2	2.5	2.8	2.1	2.9	2.2	2.4	2.5	3.5	0
	3.4	5.4	3.1	2.8	2.8	2.5	3.0	2.5	2.7	2.8	3.7	0
	4.3	5.2	3.0	2.9	2.7	2.3	3.0	2.3	2.6	2.6	3.5	0
	2.6	5.3	2.5	4.1	2.9	2.7	3.0	3.2	2.8	3.3	3.8	0
	3.5	5.2	3.2	2.7	2.9	2.3	2.7	2.4	2.6	2.8	3.6	0
	3.3	5.1	3.3	2.7	3.0	2.3	2.6	2.3	2.7	2.7	3.4	0
	2.9	5.1	2.9	3.1	3.0	2.4	3.0	3.2	2.6	3.2	3.8	0
	2.3	4.9	2.9	3.9	3.2	2.6	2.5	3.3	2.5	2.9	3.4	0
	2.6	4.9	3.0	3.1	3.2	2.7	3.0	2.6	3.0	2.9	3.6	0
	3.5	5.1	3.0	2.8	2.9	2.5	2.8	2.3	2.7	2.6	3.4	0
	4.2	5.1	3.2	2.4	2.7	2.1	2.6	2.1	2.6	2.5	3.3	0
	4.0	4.8	3.1	2.6	2.8	2.2	2.5	2.3	2.6	2.3	3.4	0
	3.2	5.1	3.0	2.7	3.0	2.4	2.7	2.6	2.7	2.9	3.5	0
	3.7	4.9	3.4	2.5	2.7	2.0	2.6	1.9	2.5	2.4	3.0	0
	4.3	5.1	3.1	2.4	2.6	2.1	2.5	2.1	2.4	2.5	3.4	0

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Rank 2025	Rank 2024		Nation Brand	Region	Index Score 2025	Index Score Change	Index Score 2024	Brand Value 2025 (USD mn)	Brand Value Change	Brand Value 2024 (USD mn)
126	118	▼		Europe	30.6	-1.8	32.4	\$13,210	+7.4%	\$12,300
127	129	▲		MENA	30.5	-0.7	31.2	\$4,680	+3.3%	\$4,530
128	116	▼		Sub-Saharan Africa	30.4	-2.3	32.7	\$47,440	+18.2%	\$40,130
129	125	▼		Europe	30.4	-1.1	31.5	\$810	+22.7%	\$660
130	140	▲		Sub-Saharan Africa	30.4	+0.4	30.0	\$6,320	-5.7%	\$6,700
131	120	▼		LATAM	30.3	-1.9	32.2	\$24,810	+6.1%	\$23,390
132	135	▲		Oceania	30.2	-0.3	30.5	\$3,140	+3.0%	\$3,050
133	139	▲		MENA	30.1	-	30.1	\$15,950	+11.1%	\$14,360
134	138	▲		Asia	30.1	-0.1	30.2	\$44,520	-6.7%	\$47,720
135	137	▲		LATAM	30.0	-0.2	30.2	\$4,110	-25.4%	\$5,510
136	131	▼		Sub-Saharan Africa	30.0	-0.8	30.8	\$10	-	\$10
137	132	▼		Sub-Saharan Africa	30.0	-0.8	30.8	\$9,610	-9.8%	\$10,650
138	146	▲		Sub-Saharan Africa	30.0	+0.8	29.2	\$1,230	-4.7%	\$1,290
139	147	▲		Sub-Saharan Africa	29.8	+0.8	29.0	\$17,990	+13.5%	\$15,850
140	130	▼		LATAM	29.7	-1.4	31.1	\$310	-3.1%	\$320
141	145	▲		Asia	29.7	+0.3	29.4	\$7,380	+10.1%	\$6,700
142	124	▼		Sub-Saharan Africa	29.6	-1.9	31.5	\$6,470	-1.4%	\$6,560
143	134	▼		Asia	29.4	-1.1	30.5	\$7,590	-17.5%	\$9,200
144	143	▼		Sub-Saharan Africa	29.3	-0.5	29.8	\$6,260	-2.0%	\$6,390
145	142	▼		Sub-Saharan Africa	29.0	-0.9	29.9	\$11,390	+12.7%	\$10,110
146	148	▲		Asia	28.8	-0.2	29.0	\$8,940	+13.7%	\$7,860
147	144	▼		Sub-Saharan Africa	28.3	-1.2	29.5	\$1,150	+10.6%	\$1,040
148	162	▲		LATAM	28.0	+0.7	27.3	\$8,320	+8.3%	\$7,680
149	151	▲		Sub-Saharan Africa	27.9	-0.7	28.6	\$6,210	+25.5%	\$4,950
150	153	▲		Sub-Saharan Africa	27.7	-0.8	28.5	\$4,710	+0.9%	\$4,670

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Nation Brand	Familiarity	Reputation	Influence	Business & Trade	International Relations	Education & Science	Culture & Heritage	Governance	Media & Communication	Sustainable Future	People & Values	Medals
	2.9	5.0	2.9	2.9	2.9	2.5	2.8	2.5	2.7	2.7	3.4	0
	5.8	4.2	3.4	1.9	2.2	1.8	2.4	1.6	2.4	1.8	2.6	0
	3.5	5.0	3.1	2.6	2.7	2.1	2.6	2.2	2.6	2.6	3.3	0
	2.4	5.2	2.5	3.7	2.8	2.6	3.0	3.1	2.6	3.1	3.6	0
	3.5	5.1	3.1	2.4	2.6	2.1	2.7	2.2	2.6	2.4	3.6	0
	3.3	4.9	2.9	2.8	2.8	2.3	2.7	2.2	2.7	2.6	3.4	0
	2.9	5.4	2.5	3.1	2.7	2.5	3.2	2.5	2.6	3.0	3.9	0
	4.8	4.6	3.2	2.2	2.5	2.0	2.1	1.9	2.3	2.1	2.8	0
	2.7	4.9	3.0	2.7	2.9	2.4	2.8	2.6	2.5	2.8	3.5	0
	2.6	5.2	2.6	3.2	2.8	2.3	3.3	2.5	2.5	2.7	3.8	0
	3.2	4.9	2.8	2.9	2.9	2.4	2.5	2.4	2.5	2.7	3.2	0
	3.3	4.9	3.0	2.6	2.7	2.2	2.6	2.1	2.4	2.7	3.4	0
	4.0	4.8	3.2	2.4	2.4	1.9	2.5	1.9	2.4	2.3	3.2	0
	2.7	4.9	2.8	3.0	2.8	2.1	2.8	2.7	2.6	2.9	3.6	0
	2.8	5.1	2.6	2.9	2.9	2.5	3.1	2.4	2.6	2.7	3.5	0
	3.0	4.8	2.9	2.7	2.7	2.3	2.8	2.5	2.5	2.6	3.6	0
	4.6	4.7	3.1	2.2	2.4	1.9	2.3	1.8	2.5	2.1	3.1	0
	3.0	4.8	2.8	2.9	2.6	2.2	2.6	2.3	2.5	2.6	3.3	0
	3.7	4.9	2.9	2.3	2.7	2.0	2.4	2.0	2.5	2.4	3.1	0
	3.5	5.0	2.9	2.4	2.5	2.0	2.5	2.0	2.4	2.4	3.3	0
	2.6	4.8	2.9	2.5	2.7	2.3	2.6	2.4	2.4	2.6	3.4	0
	2.4	5.2	2.4	2.9	2.4	2.0	3.2	2.5	2.2	2.8	4.0	0
	3.2	4.5	2.9	2.4	2.4	2.1	2.4	1.9	2.4	2.4	3.0	0
	3.6	4.5	2.9	2.2	2.4	1.9	2.1	1.8	2.4	2.3	2.9	0
	2.6	4.7	2.7	2.5	2.4	2.0	2.5	2.4	2.4	2.4	3.5	0

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Rank 2025	Rank 2024		Nation Brand	Region	Index Score 2025	Index Score Change	Index Score 2024	Brand Value 2025 (USD mn)	Brand Value Change	Brand Value 2024 (USD mn)	
151	154	▲		Trinidad and Tobago	LATAM	27.6	-0.5	28.1	\$14,560	-0.3%	\$14,600
152	136	▼		Myanmar	Asia	27.6	-2.7	30.3	\$32,850	-9.4%	\$36,260
153	152	▼		Afghanistan	Asia	27.5	-1.1	28.6	\$5,570	+9.6%	\$5,080
154	185	▲		Eswatini	Sub-Saharan Africa	27.4	+3.3	24.1	\$1,890	+13.9%	\$1,660
155	150	▼		Cape Verde	Sub-Saharan Africa	27.0	-1.6	28.6	\$1,090	+17.2%	\$930
156	158	▲		Gambia	Sub-Saharan Africa	27.0	-0.7	27.7	\$1,240	+22.8%	\$1,010
157	155	▼		Guyana	LATAM	26.9	-1.1	28.0	\$9,150	-1.2%	\$9,260
158	160	▲		Malawi	Sub-Saharan Africa	26.5	-1.0	27.5	\$6,620	+0.5%	\$6,590
159	156	▼		Papua New Guinea	Oceania	26.3	-1.6	27.9	\$11,470	-1.6%	\$11,660
160	167	▲		Grenada	LATAM	26.2	-0.7	26.9	\$540	+3.8%	\$520
161	159	▼		Equatorial Guinea	Sub-Saharan Africa	26.2	-1.4	27.6	\$3,800	+18.8%	\$3,200
162	163	▲		Guinea-Bissau	Sub-Saharan Africa	25.9	-1.2	27.1	\$810	+11.0%	\$730
163	141	▼		Benin	Sub-Saharan Africa	25.8	-4.1	29.9	\$8,870	+15.2%	\$7,700
164	168	▲		Gabon	Sub-Saharan Africa	25.8	-1.0	26.8	\$5,500	+6.6%	\$5,160
165	157	▼		Togo	Sub-Saharan Africa	25.6	-2.1	27.7	\$3,790	+12.1%	\$3,380
166	161	▼		Burkina Faso	Sub-Saharan Africa	25.4	-2.1	27.5	\$7,520	+6.5%	\$7,060
167	164	▼		Comoros	Sub-Saharan Africa	25.3	-1.7	27.0	\$570	+7.5%	\$530
168	166	▼		Belize	LATAM	25.3	-1.6	26.9	\$1,090	-0.9%	\$1,100
169	169	=		Sierra Leone	Sub-Saharan Africa	25.2	-1.6	26.8	\$2,090	+24.4%	\$1,680
170	171	▲		Haiti	LATAM	25.0	-1.6	26.6	\$9,620	+12.5%	\$8,550
171	170	▼		Samoa	Oceania	25.0	-1.7	26.7	\$470	+14.6%	\$410
172	174	▲		São Tomé and Príncipe	Sub-Saharan Africa	24.7	-1.4	26.1	\$460	+15.0%	\$400
173	173	=		Burundi	Sub-Saharan Africa	24.6	-1.6	26.2	\$3,470	+11.6%	\$3,110
174	178	▲		Antigua and Barbuda	LATAM	24.5	-1.0	25.5	\$910	+12.3%	\$810
175	187	▲		Saint Vincent and the Grenadines	LATAM	24.5	+0.7	23.8	\$880	+10.0%	\$800

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Nation Brand	Familiarity	Reputation	Influence	Business & Trade	International Relations	Education & Science	Culture & Heritage	Governance	Media & Communication	Sustainable Future	People & Values	Medals
	2.5	4.7	2.5	2.7	2.5	2.2	3.1	2.3	2.4	2.4	3.5	0
	3.8	4.3	2.9	2.3	2.2	1.8	2.3	1.8	2.3	2.1	2.6	0
	6.1	3.8	3.0	1.7	2.1	1.5	1.7	1.5	1.9	1.6	1.9	0
	2.0	4.2	2.7	2.8	2.5	2.3	2.6	2.6	2.5	2.5	3.3	0
	2.3	4.8	2.6	2.4	2.4	1.9	2.9	2.3	2.4	2.4	3.5	0
	2.8	4.5	2.7	2.5	2.4	2.0	2.3	2.0	2.2	2.3	3.3	0
	2.5	4.5	2.6	2.5	2.5	2.1	2.5	2.1	2.4	2.4	3.2	0
	2.6	4.4	2.7	2.4	2.4	1.8	2.3	2.1	2.3	2.5	3.2	0
	2.8	4.7	2.4	2.4	2.4	2.1	2.3	2.0	2.3	2.3	3.1	0
	2.0	4.2	2.3	2.9	2.7	2.5	2.6	2.2	2.4	2.5	3.1	0
	2.6	4.5	2.6	2.3	2.5	1.9	2.2	2.0	2.2	2.4	3.1	0
	2.4	4.3	2.6	2.4	2.5	1.9	2.3	1.9	2.3	2.3	3.1	0
	2.4	4.3	2.6	2.3	2.3	2.0	2.5	2.0	2.1	2.3	3.1	0
	2.4	4.3	2.6	2.3	2.3	1.8	2.3	2.0	2.3	2.3	3.1	0
	2.5	4.3	2.5	2.3	2.4	1.9	2.3	2.1	2.3	2.4	3.2	0
	2.6	4.3	2.6	2.0	2.3	1.6	2.2	2.0	2.2	2.1	3.0	0
	2.1	4.3	2.2	2.5	2.6	1.9	2.6	2.3	2.1	2.5	3.4	0
	1.9	4.1	2.4	2.7	2.4	2.1	2.4	2.1	2.2	2.3	3.0	0
	2.6	4.4	2.4	2.0	2.4	1.9	2.3	2.0	2.2	2.3	3.0	0
	3.9	4.3	2.4	1.9	1.9	1.6	2.2	1.5	1.9	1.9	2.7	0
	2.0	4.2	2.2	2.5	2.5	2.2	2.6	2.2	2.3	2.4	3.3	0
	1.8	3.7	2.6	2.4	2.3	1.9	2.2	2.3	2.2	2.4	2.7	0
	2.3	4.0	2.6	2.1	2.2	1.6	2.2	2.0	2.2	2.4	3.0	0
	1.8	4.0	2.2	2.5	2.5	2.1	2.6	2.3	2.3	2.3	3.0	0
	1.7	3.8	2.3	2.6	2.6	2.1	2.3	2.2	2.4	2.2	2.7	0

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Rank 2025	Rank 2024		Nation Brand	Region	Index Score 2025	Index Score Change	Index Score 2024	Brand Value 2025 (USD mn)	Brand Value Change	Brand Value 2024 (USD mn)
176	176	=	Chad	Sub-Saharan Africa	24.3	-1.4	25.7	\$5,010	+13.1%	\$4,430
177	189	▲	Djibouti	Sub-Saharan Africa	24.2	+0.5	23.7	\$2,290	+9.0%	\$2,100
178	172	▼	Saint Lucia	LATAM	23.9	-2.4	26.3	\$1,860	+5.7%	\$1,760
179	165	▼	Solomon Islands	Oceania	23.9	-3.0	26.9	\$610	+3.4%	\$590
180	175	▼	Timor-Leste	Asia	23.5	-2.2	25.7	\$860	-7.5%	\$930
181	179	▼	Somalia	Sub-Saharan Africa	23.5	-1.7	25.2	\$10	-	\$10
182	181	▼	Suriname	LATAM	23.3	-1.5	24.8	\$2,400	+9.1%	\$2,200
183	177	▼	Tonga	Oceania	23.3	-2.2	25.5	\$220	-4.3%	\$230
184	180	▼	Lesotho	Sub-Saharan Africa	23.1	-1.9	25.0	\$1,330	+3.9%	\$1,280
185	184	▼	Eritrea	Sub-Saharan Africa	22.8	-1.4	24.2	\$540	+3.8%	\$520
186	190	▲	Saint Kitts and Nevis	LATAM	21.2	-2.1	23.3	\$880	+10.0%	\$800
187	182	▼	Marshall Islands	Oceania	20.8	-3.8	24.6	\$220	-	\$220
188	192	▲	Nauru	Oceania	20.2	-2.4	22.6	\$60	+20.0%	\$50
189	183	▼	Palau	Oceania	20.1	-4.2	24.3	\$140	+7.7%	\$130
190	188	▼	Micronesia	Oceania	20.1	-3.6	23.7	\$180	+5.9%	\$170
191	186	▼	Tuvalu	Oceania	20.0	-3.9	23.9	\$30	+50.0%	\$20
192	191	▼	Vanuatu	Oceania	19.3	-3.9	23.2	\$530	-15.9%	\$630
193	193	=	Kiribati	Oceania	18.8	-3.1	21.9	\$110	+22.2%	\$90

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Nation Brand	Familiarity	Reputation	Influence	Business & Trade	International Relations	Education & Science	Culture & Heritage	Governance	Media & Communication	Sustainable Future	People & Values	Medals
	2.5	4.1	2.5	2.1	2.3	1.7	2.0	1.7	2.1	2.1	2.8	0
	2.2	4.2	2.6	2.2	2.1	1.7	2.0	1.9	1.9	2.0	2.8	0
	1.7	3.9	2.2	2.5	2.3	2.1	2.4	2.1	2.2	2.2	3.0	0
	1.9	4.0	2.1	2.5	2.5	2.1	2.2	2.1	2.2	2.4	2.7	0
	1.9	3.9	2.3	2.2	2.3	2.0	1.9	2.0	2.2	2.2	2.6	0
	4.4	3.9	2.4	1.5	1.7	1.4	1.5	1.3	1.8	1.5	2.2	0
	2.0	4.0	2.3	2.2	2.3	2.0	2.0	1.8	2.1	2.1	2.6	0
	1.8	3.9	2.2	2.2	2.2	1.9	2.1	2.0	2.3	2.3	2.8	0
	1.9	3.9	2.3	2.1	2.2	1.8	2.2	1.9	2.0	2.1	2.9	0
	2.2	3.9	2.4	1.8	2.1	1.7	2.0	1.7	1.9	1.9	2.7	0
	1.5	3.4	2.0	2.2	2.0	1.8	2.1	1.8	2.0	2.0	2.6	0
	1.5	3.3	1.9	2.2	2.1	1.8	1.9	1.9	2.0	2.1	2.3	0
	1.4	3.2	1.9	2.2	2.0	1.9	1.8	1.8	2.0	1.9	2.1	0
	1.4	3.2	1.9	2.1	1.9	1.8	1.8	1.7	2.0	1.9	2.1	0
	1.4	3.2	1.9	2.1	2.2	1.9	1.8	1.8	2.0	1.9	2.1	0
	1.3	3.0	1.8	2.2	2.3	1.9	1.9	1.9	2.1	2.0	2.2	0
	1.4	3.1	1.8	2.1	2.0	1.7	1.8	1.7	1.9	1.9	2.2	0
	1.3	2.9	1.7	2.0	2.1	1.8	1.7	1.7	1.9	1.9	2.1	0

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# The Virtuous Circle of Place Branding

## Place brand building starts with investment in the place brand

which results in an incremental improvement to familiarity and perceptions and in effect Soft Power.

## Increased Soft Power positively impacts a place brand's performance

resulting in increased economic growth captured in place brand value – available to further invest in the place brand.



## Brand Finance can help you

- **measure perceptions** of your place brand
- **evaluate ROI** at every stage in this virtuous circle
  - develop a **successful strategy**

Contact us at [softpower@brandfinance.com](mailto:softpower@brandfinance.com)



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