



# Soft Power Report 2025 – Latvia

Prepared for the Investment and Development Agency of Latvia (LIAA)

31<sup>st</sup> December 2025



Investment and  
Development  
Agency of Latvia

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- Showcases relevant Brand Finance and Brand Dialogue case studies demonstrating effective place and product branding.



# About Brand Finance

Brand Finance is the world's leading brand evaluation and strategy consultancy. We have been measuring and advising how to boost brands for nearly 30 years.



Brand Finance was central to the creation of **ISO standards for brand measurement**: ISO 10668 and 20671 and is accredited by the International Valuation Standards Council (IVSC) as well as marketing standards organisations across the EU, UK, and US.



Our **team** consists of market researchers and data analysts, place brand and marketing experts, government policy professionals, economists, and financial consultants.



We have tracked the strength and value of the world's top **Nation Brands** continuously for 20+ years. We now publish the annual Global Soft Power Index – surveying opinions of 150,000+ respondents in 100+ markets on all 193 member states of the United Nations, and the **Brand Finance City Index** – on the best city brands from across the globe.



Brand Finance follows a **measurement-based approach to place brand strategy**, involving perceptions research, statistical investment and performance data, and financial analysis.



We **advise** place brands on the effectiveness of their strategies, **provide training** to their teams, and **help communicate** with their key stakeholders.



Headquartered in the **City of London**, we are present in **25+ countries across all continents**, including **Central and Northern Europe**.



# Nation Brands using the Global Soft Power Index

We have worked with a variety of nation brands from around the world



Ministry for Foreign  
Affairs of Finland



Ministry of Foreign Affairs  
Republic of Poland

**SI.** Swedish  
Institute



**BRAND UKRAINE**



**Uruguay XXI**  
INVESTMENT, EXPORT AND COUNTRY  
BRAND PROMOTION AGENCY



Sri Lanka Institute of Marketing



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# Global Soft Power Index Methodology



# Virtuous Circle of Nation Branding

## Investment to Perceptions to Performance

- Nation brand building starts with **investment** in the nation brand, which results in an incremental improvement to **familiarity and perceptions** and in effect **Soft Power**.
- Increased Soft Power positively impacts a nation brand's **performance** in investment, trade, talent, and tourism attraction, resulting in **economic and nation brand value** growth – available to further invest in the nation brand.
- Brand Finance can help **measure perceptions** of your nation brand and the **return on investment** at every stage in this virtuous circle as well as assist you in **developing a successful strategy** that makes the most of the benefits that nation branding can offer.



# Brand Finance's Definition of Soft Power

“

*The power of perceptions which can be leveraged by nation brands to strengthen security as well as attract investment, trade, talent, and tourism, and in effect improve economic growth.*

”



# Research Coverage of the Global Soft Power Index 2025

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



**193**

all member states  
of the United Nations ranked



**100+**

markets of research  
including Russia after a two-year gap



**170,000+**

respondents surveyed



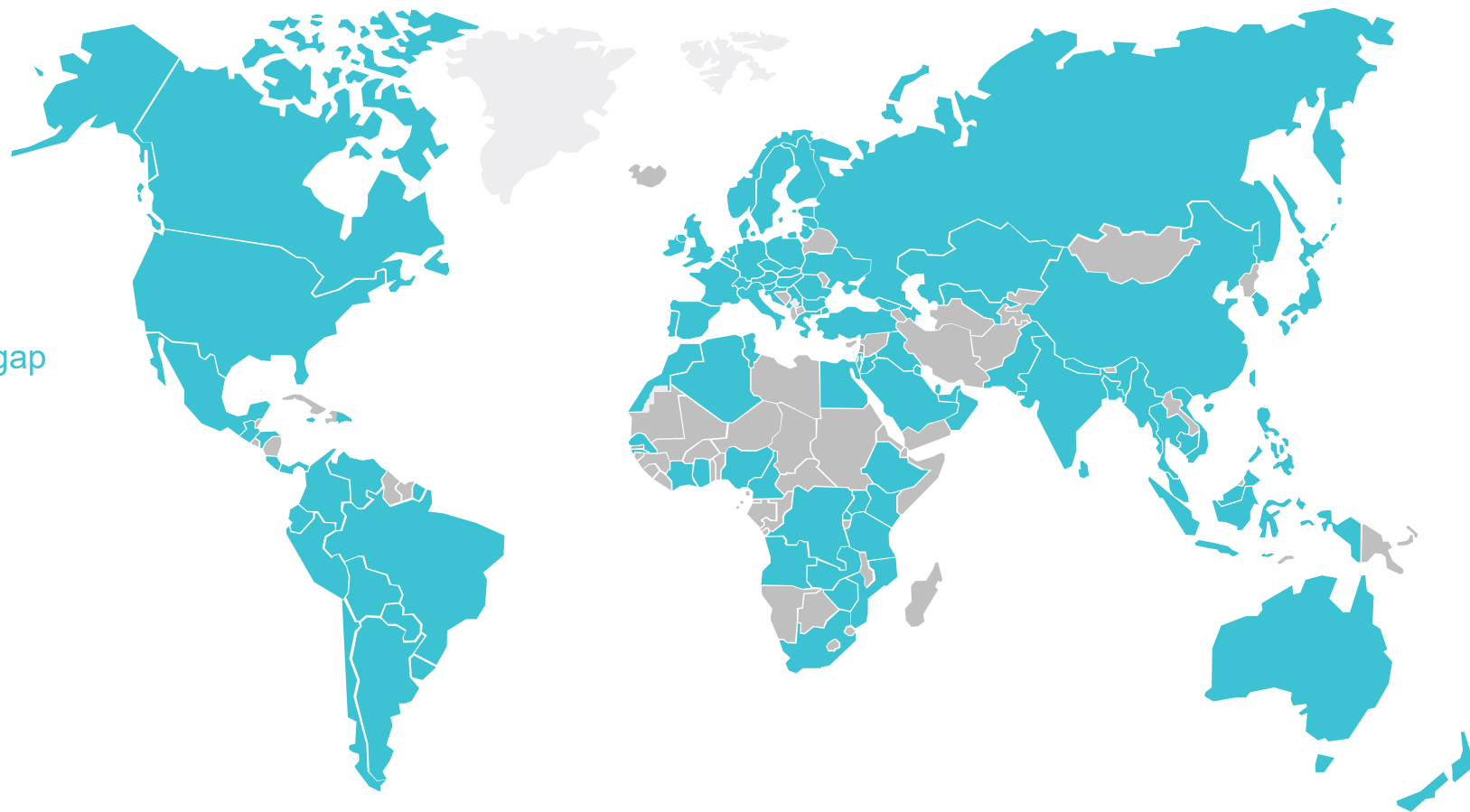
**55**



metrics covered



**5**

dimensions of your nation's attractiveness  
as a place to invest in, buy products/services from, work  
and study in, as well as visit

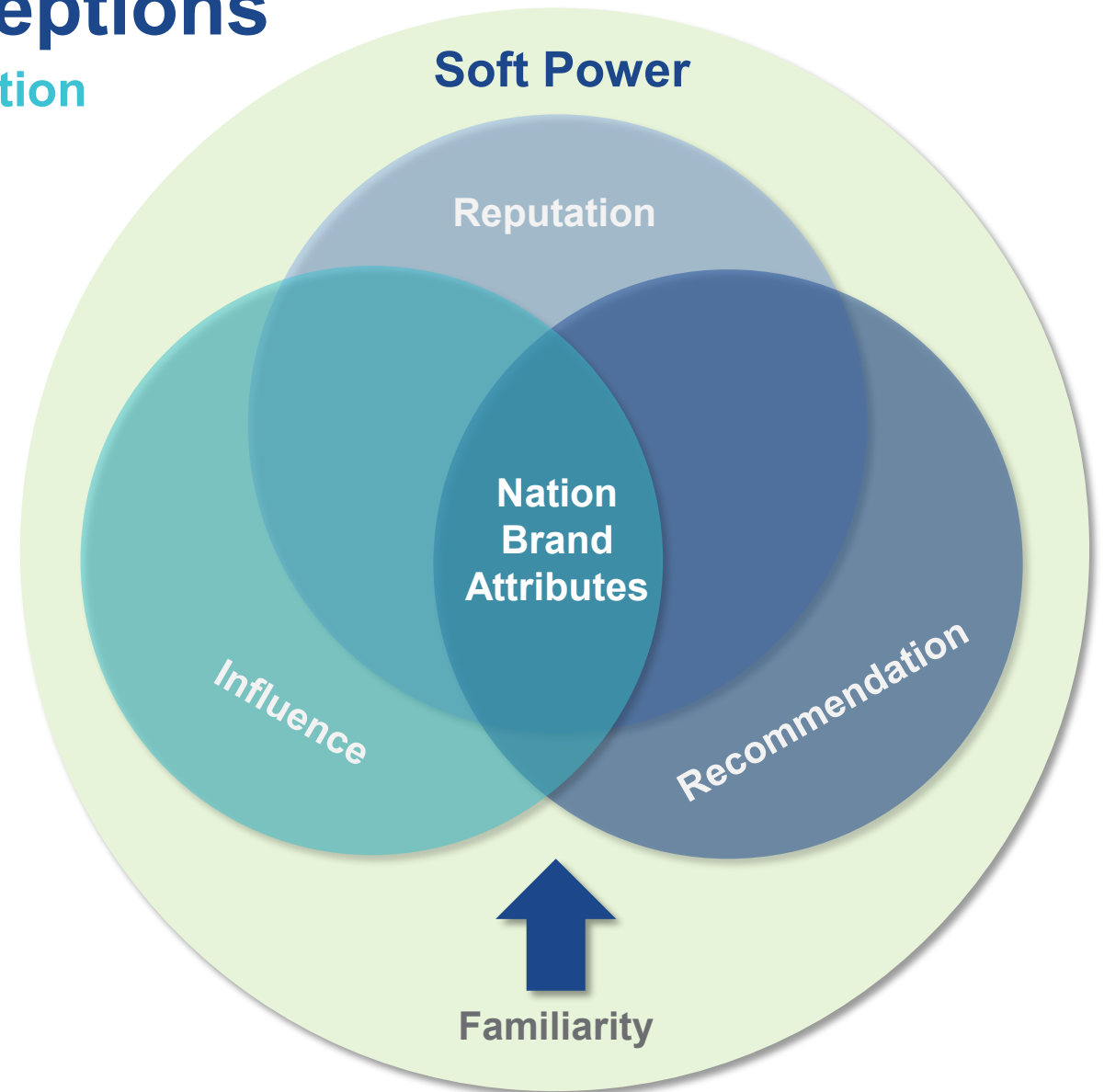


Market of Research and Nation Brand   
Nation Brand only 

# Measuring Nation Brand Perceptions









## GSPI offers a holistic approach to brand evaluation

- ✓ The Global Soft Power Index provides a **holistic measure** not only of a nation's Soft Power but also of nation brand perceptions in the most holistic way possible
- ✓ It is the only index to look at **Familiarity, Reputation, Influence, and Recommendation**
- ✓ Familiarity offers insight to what extent the public is able to **form perceptions** about the nation brand
- ✓ With Reputation, Influence, and Recommendation assessed in separate questions to the list of Nation Brand Attributes, we are able to conduct **meaningful statistical drivers analysis**
- ✓ Drivers analysis helps understand the relationships between the Key Performance Indicators (independent variables) and Nation Brand Attributes (dependent variables), offering **strategic guidance on how to prioritise marketing communications** messaging across markets and audiences



# Attributes Measured by the Global Soft Power Index

3 Key Performance Indicators and 35 Attributes grouped under 8 Pillars

											
				Business & Trade	International Relations	Education & Science	Culture & Heritage	Governance	Media & Communication	Sustainable Future	People & Values
Familiarity	Reputation	Influence	Recommendation	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				



# Legend & Definitions

## What is the difference between a Nation Brand and a Market of Research?

- **Nation Brand:** Refers to the country that we are presenting the results of.
- **Market of Research:** Refers to the country in which the research was conducted.

## How to interpret the trend arrows?

- Given that nation brands may increase or decrease their scores without necessarily altering their relative positions within the ranking, or vice-versa move up and down the ranking without seemingly changing much in score, we have devised a methodology to identify noteworthy year-on-year fluctuations in nation brand perceptions. It takes into account the score variation for a given nation brand and how this compares to the score variation of other nations within its peer group.
- The approach calculates the mean of year-on-year changes across any peer group of 20 nation brands in each metric and subsequently determines the standard deviation from this mean to discern substantial deviations in perceptions. Nation brands exhibiting score increases exceeding this standard deviation are denoted with a green arrow, while those experiencing decreases greater than one standard deviation are marked with a red arrow. Nation brands with changes falling within the standard deviation are annotated with a grey horizontal arrow.



## What is Drivers Analysis?

- In the Global Soft Power Index, respondents assess nation brands based on different image attributes grouped into pillars. By conducting regression analysis with these attributes against Reputation and Influence, we determine how each pillar and attribute affects people's ratings.
- Key drivers analysis is a statistical method used to pinpoint the factors with the greatest impact on a specific outcome. It aids in identifying which factors impact Reputation or Influence the most, allowing for focused resource allocation to achieve objectives efficiently.

## How is the Index weighted?

- The weightings given to each measure within the Index are based on statistical drivers analysis assessing the degree to which attribute perceptions impact Reputation and Influence.
- This was determined through regression analysis on respondent-level data from all markets.

# Base sizes



# Global survey base sizes for 2025

Nation Brand	Market of Research	Base Size Familiarity	Base Size Reputation & Influence	Base Size Nation Brand Attributes	Base Size Recommendation
Sweden	Global	21,675	14,790	11,986	7,764
Norway	Global	22,016	14,591	11,689	7,486
Finland	Global	21,879	13,887	11,358	7,251
Estonia	Global	21,498	7,868	5,160	3,113
Lithuania	Global	21,457	8,103	5,189	3,178
Latvia	Global	21,540	7,682	5,076	3,083



# Survey base sizes for benchmark nations in target markets

Market of Research	Nation Brand	Base Size Familiarity	Base Size Reputation & Influence	Base Size Nation Brand Attributes	Base Size Recommendation
Finland	Sweden	214	177	146	78
Finland	Norway	214	175	145	78
Finland	Finland	-	304	304	304
Finland	Estonia	240	204	157	91
Finland	Lithuania	232	133	104	53
Finland	Latvia	246	157	110	64
Sweden	Sweden	-	472	472	472
Sweden	Norway	366	263	213	122
Sweden	Finland	366	263	213	123
Sweden	Estonia	397	207	118	58
Sweden	Lithuania	395	177	99	55
Sweden	Latvia	397	182	104	55
Germany	Sweden	727	477	420	248
Germany	Norway	730	448	409	243
Germany	Finland	728	436	397	229
Germany	Estonia	789	267	166	97
Germany	Lithuania	792	295	170	98
Germany	Latvia	793	304	182	104
United Kingdom	Sweden	727	455	412	241
United Kingdom	Norway	729	450	410	239
United Kingdom	Finland	727	441	406	238
United Kingdom	Estonia	791	284	184	103
United Kingdom	Lithuania	791	301	182	104
United Kingdom	Latvia	789	272	186	103
United States	Sweden	722	463	402	226
United States	Norway	722	443	394	226
United States	Finland	722	458	405	228
United States	Estonia	792	195	182	106
United States	Lithuania	775	295	195	109
United States	Latvia	793	195	172	103

# Survey base sizes for Latvia in all markets

Market of Research	Base Size Familiarity	Base Size Reputation & Influence	Base Size Nation Brand Attributes	Base Size Recommendation
India	838	314	203	107
Germany	793	304	182	104
USA	793	195	172	103
China	791	156	130	78
France	790	238	157	89
Japan	790	124	106	77
UK	789	272	186	103
Australia	493	177	116	67
UAE	469	206	145	76
Mexico	419	132	97	60
South Africa	414	99	90	60
Brazil	413	130	97	59
Italy	411	200	118	62
South Korea	409	140	115	60
Saudi Arabia	405	114	100	56
Türkiye	403	203	134	67
Canada	399	146	99	56
Spain	399	146	93	52
Sweden	397	182	104	55
Singapore	396	99	79	45
Egypt	393	153	119	66
Poland	389	196	118	66
Indonesia	386	146	119	63
New Zealand	275	50	46	31
Israel	268	122	73	39
Switzerland	260	79	57	33
Denmark	257	101	58	33
Norway	250	103	63	33
Finland	246	157	110	64
Ukraine	240	151	93	40
Argentina	208	83	64	39
Malaysia	207	90	65	36
Thailand	206	67	49	26
Netherlands	206	67	39	23
Philippines	203	62	49	28
Vietnam	202	75	50	29

Market of Research	Base Size Familiarity	Base Size Reputation & Influence	Base Size Nation Brand Attributes	Base Size Recommendation
Nigeria	177	44	13	13
Kenya	175	42	11	11
Ecuador	161	35	27	15
Russia	159	137	62	62
Colombia	145	30	25	17
Croatia	143	66	41	21
Czechia	142	73	44	23
Hungary	142	77	42	23
Bolivia	142	22	19	13
Slovakia	141	73	45	20
Estonia	140	109	81	44
Ireland	140	70	39	19
Uruguay	139	33	25	15
Paraguay	139	24	20	13
Bulgaria	138	71	42	23
Peru	138	35	26	15
Chile	138	32	24	16
Austria	136	97	64	36
Lithuania	136	101	52	24
Serbia	136	69	44	23
Belgium	136	35	24	15
Greece	135	99	61	31
Portugal	135	35	28	16
Slovenia	134	66	37	20
Bangladesh	133	32	7	7
Romania	131	127	56	38
Pakistan	115	18	5	5
Bahrain	104	32	8	11
Kazakhstan	90	70	32	32
Ghana	90	21	1	1
Morocco	89	25	6	6
Venezuela	86	14	6	6
Guatemala	83	12	4	4
Georgia	82	51	23	23
Panama	78	15	7	7
Algeria	77	27	8	8

Market of Research	Base Size Familiarity	Base Size Reputation & Influence	Base Size Nation Brand Attributes	Base Size Recommendation
Dominican Republic	77	14	4	4
Jordan	76	21	12	12
Tunisia	76	31	7	7
Costa Rica	74	14	1	1
Iraq	71	17	7	7
Ethiopia	70	11	4	4
Cameroon	67	21	8	8
Sri Lanka	67	18	5	5
Cote d'Ivoire	66	12	3	3
Tanzania	65	14	3	3
Qatar	64	24	7	7
Mozambique	63	16	1	1
Zambia	63	11	0	0
Azerbaijan	61	43	14	14
Kuwait	61	22	7	7
Trinidad & Tobago	59	11	2	2
Myanmar	58	16	6	6
Honduras	58	8	5	5
Zimbabwe	58	5	0	0
DR Congo	56	11	5	5
Senegal	54	20	8	8
Uganda	54	28	7	7
Angola	51	8	3	3
Nepal	50	6	4	4
Rwanda	45	12	1	1
Jamaica	43	6	2	2
Oman	42	16	9	9
Cambodia	41	8	3	3
Uzbekistan	38	40	22	22
Latvia	-	162	162	162

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# Executive Summary





# Latvia ranks 76<sup>th</sup> in the Global Soft Power Index 2025

While the Nordics serve as a long-term aspirational benchmarks, Latvia has a clear opportunity to close the gap with its Baltic peers, where small gains can have a meaningful impact on relative ranking



## What is the current dynamic among benchmarks?

- As the war in Ukraine continues, public attention is gradually diffusing, reducing the visibility boost that initially benefited nations at the forefront of support. Latvia, Lithuania and Estonia all gained from this early “halo effect” but as conflict fatigue sets in, rankings have softened, with Estonia and Lithuania experiencing sharper declines after larger initial gains.
- A coherent nation brand strategy rooted in robust data supports the development of national soft power. Ultimately, the objective is not only to improve in rankings, but to boost national security and enable economic growth.
- Nordic countries have long held considerable soft power, built up over time and consistently reinforced.
- Closing the gap with them requires sustained effort and should be viewed as a long-term aspiration, while nearer-term focus lies in strengthening Latvia's position relative to its Baltic peers.

## Who can be challenged by Latvia?

- Closing the gap with Lithuania would require Latvia to move ahead of a small group of nations with strong cultural visibility or tourism appeal, largely in Latin America - not an unsurmountable challenge given the narrow score differences in the rankings.
- To then challenge Estonia, Latvia would need to surpass a mix of European peers such as Serbia, Bulgaria and Malta, as well as Uruguay.

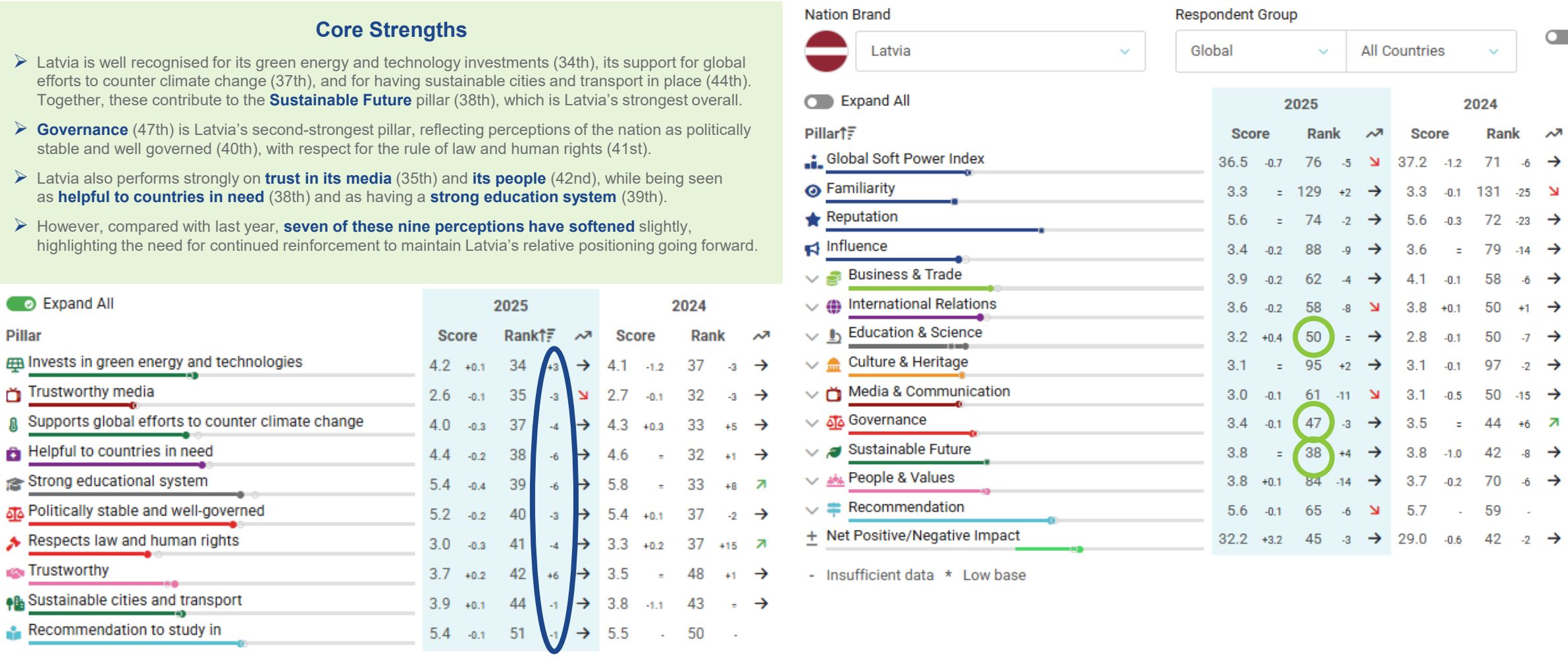
# Overview of Latvia's global performance over the years

Latvia saw a notable uplift in 2023, driven by increased visibility against the backdrop of the Russia-Ukraine conflict; however, this halo effect has faded quickly, with scores gradually returning towards pre-2023 levels, underlining the need for a longer-term nation brand strategy that is less reliant on external factors

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# Overview of Latvia's global performance - strengths

Latvia breaks into the global top 50 for Sustainability, Governance, and Education, likely reflecting assumptions about Latvia's civilisational advancement as part of the EU, while at the same time Latvia lacks a particularly pronounced set of strengths rooted in its own nation brand, pointing to the need for a more coherent nation brand strategy



# Overview of Latvia's global performance - weaknesses

Latvia's main challenge remains global visibility, which in turn limits perceived reputation and influence. Among the pillars, Culture & Heritage and People & Values present the clearest opportunities to strengthen Latvia's international standing through creating a deeper, more personal connection with global audiences

### Core Weaknesses

- **International Relations** (58th) and **Media & Comms** (61st) have seen the sharpest declines, likely reflecting the gradual easing of the heightened visibility Latvia gained through its early and vocal support for Ukraine as global attention becomes more diffused over time.
- **Culture & Heritage** (95th) remains Latvia's weakest pillar overall, driven by low associations with loved food (140th), rich heritage (125th) and sport (115th), art and entertainment (79th), and as a result, appealing lifestyle (87th) - likely reflecting shallow familiarity, where limited knowledge of Latvia constrains stronger perceptions.
- There has also been a notable decline in the **People & Values** pillar, with Latvia ranking particularly low on perceptions of generosity (153rd) and fun (140th). Similarly, perceptions of **products and brands** (107th) appear weak, which also likely to reflect low familiarity rather than a strong negative sentiment.

Expand All

Pillar	2025				2024			
	Score	Rank	Δ	↗	Score	Rank	Δ	↗
Generous	2.5	-0.2	153	-31	2.7	-0.5	122	-29
Food the world loves	2.4	-0.2	140	-7	2.6	-0.5	133	-31
Fun	3.3	-0.3	140	-29	3.6	-0.6	111	-38
Rich heritage	4.0	-0.3	125	-18	4.3	+0.3	107	+2
Leader in sports	1.0	-0.2	115	-16	1.2	+0.1	99	+6
Products and brands the world loves	2.3	-0.2	107	-25	2.5	-0.5	82	-18
Appealing lifestyle	2.9	-0.3	87	-16	3.2	-	71	-7
Influential in diplomatic circles	2.6	-0.2	83	-20	2.8	+0.2	63	+20
Easy to communicate with	3.7	-0.4	81	-21	4.1	-0.3	60	-1
Influential in arts and entertainment	2.7	-0.1	79	-4	2.8	-0.3	75	-6

Nation Brand

Latvia

Respondent Group

Global

All Countries

Expand All

Pillar	2025					2024				
	Score	Δ	Rank	Δ	↗	Score	Δ	Rank	Δ	↗
Global Soft Power Index	36.5	-0.7	76	-5	↘	37.2	-1.2	71	-6	→
Familiarity	3.3	=	129	+2	→	3.3	-0.1	131	-25	↘
Reputation	5.6	=	74	-2	→	5.6	-0.3	72	-23	→
Influence	3.4	-0.2	88	-9	→	3.6	=	79	-14	→
Business & Trade	3.9	-0.2	62	-4	→	4.1	-0.1	58	-6	→
International Relations	3.6	-0.2	58	-8	↘	3.8	+0.1	50	+1	→
Education & Science	3.2	+0.4	50	=	→	2.8	-0.1	50	-7	→
Culture & Heritage	3.1	=	95	+2	→	3.1	-0.1	97	-2	→
Media & Communication	3.0	-0.1	61	-11	↘	3.1	-0.5	50	-15	→
Governance	3.4	-0.1	47	-3	→	3.5	=	44	+6	↗
Sustainable Future	3.8	=	38	+4	→	3.8	-1.0	42	-8	→
People & Values	3.8	+0.1	84	-14	→	3.7	-0.2	70	-6	→
Recommendation	5.6	-0.1	65	-6	↘	5.7	-	59	-	-
Net Positive/Negative Impact	32.2	+3.2	45	-3	→	29.0	-0.6	42	-2	→

- Insufficient data

\* Low base



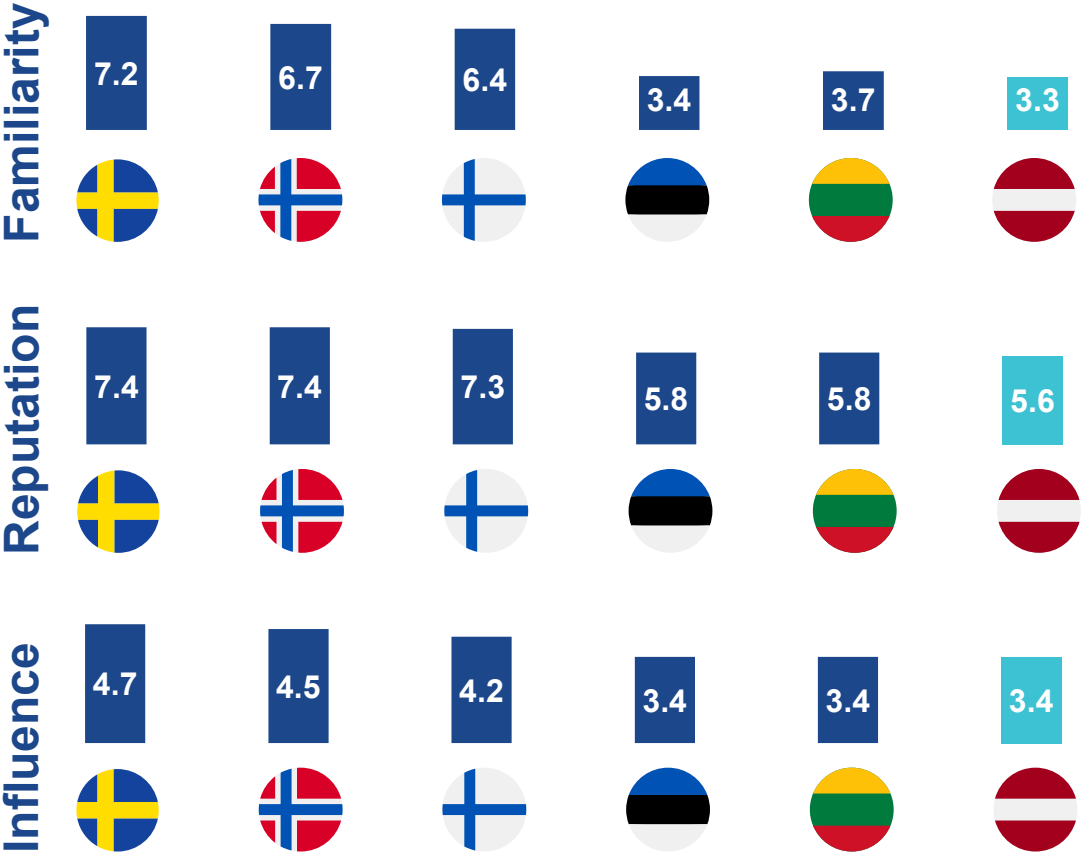
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# Latvia's KPI Performance



# A visible divide separates Baltic and Nordic benchmarks

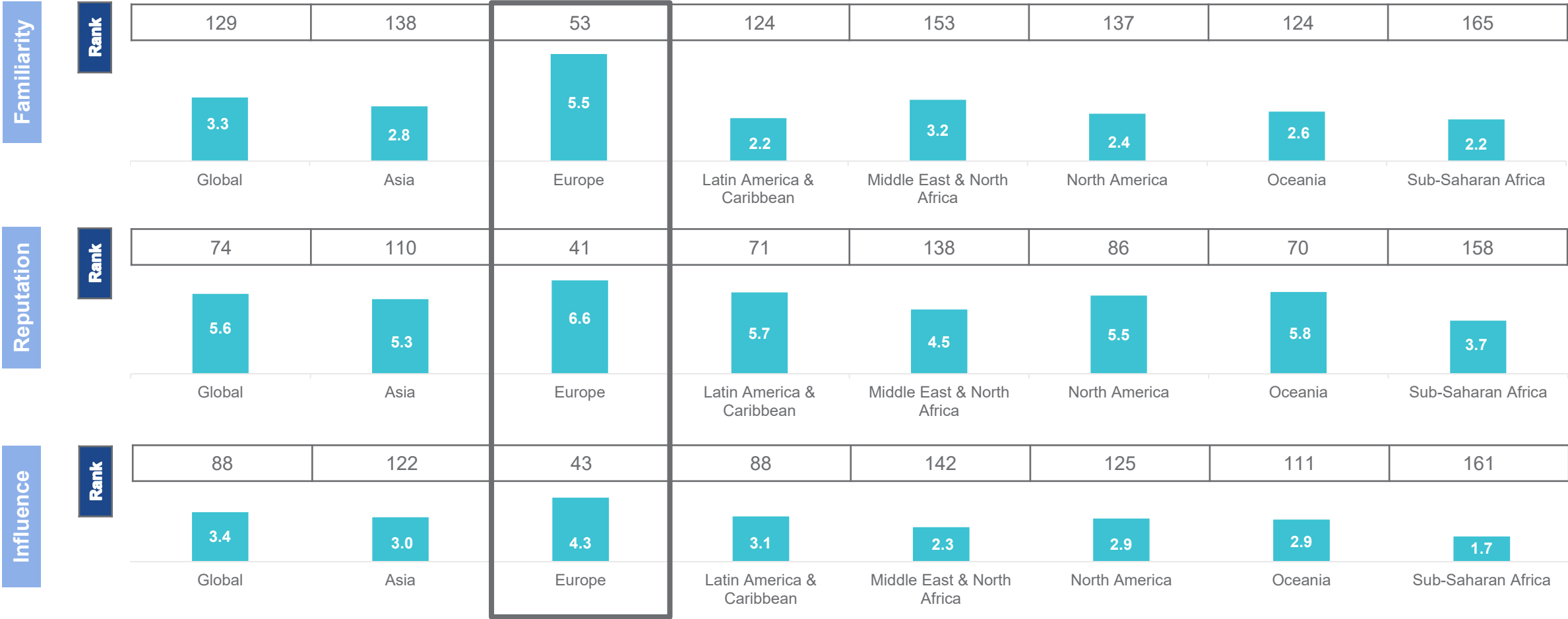
The Nordics are ahead of the Baltics across all key measures. Among the Baltics, Lithuania leads on familiarity, while Latvia and Estonia sit further down, with all three outside the top 100, highlighting a shared visibility challenge. All three Baltic states rank higher on reputation and influence, though Latvia places last among the trio



2025 Global Ranks						
Nation Brand	Sweden	Norway	Finland	Estonia	Lithuania	Latvia
Global Soft Power Index	11	17	23	65	70	76
Familiarity	25	32	41	128	113	129
Reputation	7	9	11	63	65	74
Influence	22	27	35	83	81	88

# Familiarity building efforts are essential for Latvia

Latvia performs strongest across key metrics in Europe, while familiarity falls well outside the top 100 in all other regions. Reputation and influence, in line with familiarity, are weakest in Middle East and Africa, but remain rather limited across North Africa and Asia too. This indicates clear scope for stronger regional engagement beyond Europe, especially in selected priority markets across North America, Asia, and the Middle East



# Where Latvia's Familiarity falls below the 33rd percentile

Latvia's Familiarity often falls below the 33rd percentile in major regional power markets such as China, India, and the UAE, limiting visibility in regions that strongly shape wider perceptions. Within the Index model, low Familiarity triggers downward adjustments to other perception scores to correct potentially overstated perceptions

Nation	Market	Region	Awareness	Familiarity	33rd Percentile (familiarity)	Difference
Latvia	United States	North America	69%	23%	26%	-3%
Latvia	Bolivia	Latin America & Caribbean	65%	15%	15%	-1%
Latvia	Jamaica	Latin America & Caribbean	64%	17%	22%	-4%
Latvia	Trinidad and Tobago	Latin America & Caribbean	71%	21%	29%	-8%
Latvia	Honduras	Latin America & Caribbean	80%	13%	18%	-5%
Latvia	China	Asia	55%	18%	19%	-1%
Latvia	India	Asia	68%	37%	43%	-6%
Latvia	Indonesia	Asia	80%	34%	38%	-4%
Latvia	Japan	Asia	76%	15%	17%	-2%
Latvia	Malaysia	Asia	75%	35%	36%	-1%
Latvia	Philippines	Asia	79%	32%	38%	-6%
Latvia	Thailand	Asia	77%	32%	34%	-2%
Latvia	Nepal	Asia	49%	11%	20%	-8%
Latvia	Bangladesh	Asia	66%	26%	29%	-3%
Latvia	Pakistan	Asia	47%	16%	27%	-11%
Latvia	Egypt	Middle East & North Africa	68%	35%	48%	-13%
Latvia	United Arab Emirates	Middle East & North Africa	78%	40%	49%	-10%
Latvia	Saudi Arabia	Middle East & North Africa	57%	28%	42%	-14%
Latvia	Iraq	Middle East & North Africa	63%	20%	27%	-7%
Latvia	Bahrain	Middle East & North Africa	76%	36%	44%	-8%

Nation	Market	Region	Awareness	Familiarity	33rd Percentile (familiarity)	Difference
Latvia	Qatar	Middle East & North Africa	79%	35%	46%	-11%
Latvia	Algeria	Middle East & North Africa	74%	33%	42%	-9%
Latvia	Jordan	Middle East & North Africa	56%	24%	25%	-1%
Latvia	Kuwait	Middle East & North Africa	62%	30%	43%	-13%
Latvia	Morocco	Middle East & North Africa	61%	22%	45%	-23%
Latvia	Tunisia	Middle East & North Africa	68%	28%	39%	-11%
Latvia	South Africa	Sub-Saharan Africa	61%	19%	33%	-14%
Latvia	Ghana	Sub-Saharan Africa	62%	24%	34%	-10%
Latvia	Democratic Republic of the Congo	Sub-Saharan Africa	79%	16%	32%	-16%
Latvia	Rwanda	Sub-Saharan Africa	50%	31%	37%	-7%
Latvia	Senegal	Sub-Saharan Africa	78%	15%	24%	-9%
Latvia	Tanzania	Sub-Saharan Africa	60%	21%	39%	-18%
Latvia	Uganda	Sub-Saharan Africa	72%	27%	36%	-9%
Latvia	Kenya	Sub-Saharan Africa	79%	28%	42%	-15%
Latvia	Nigeria	Sub-Saharan Africa	65%	26%	41%	-15%
Latvia	Zambia	Sub-Saharan Africa	55%	17%	36%	-19%
Latvia	Zimbabwe	Sub-Saharan Africa	62%	8%	29%	-21%
Latvia	Cote d'Ivoire	Sub-Saharan Africa	85%	16%	24%	-8%
Latvia	Angola	Sub-Saharan Africa	71%	19%	25%	-6%
Latvia	Ethiopia	Sub-Saharan Africa	73%	19%	30%	-12%



# Latvia is better known in neighbouring markets, where reputation and influence mirror familiarity levels

- Latvia **performs strongest in neighbouring markets**, including the Nordics and nations with similar political stance such as Poland. Even here, however, there is room to further strengthen reputation and influence, particularly within the Baltics, where familiarity is highest and should translate into stronger perceptions.
- In more distant markets, Latvia scores relatively well in markets such as **Georgia**, **Azerbaijan** and **Kazakhstan**, likely reflecting historic Soviet ties as well as more recent exposure through business links, e.g. airBaltic connections to Tbilisi, Baku, and Almaty, which help raise visibility.
- Familiarity with Latvia is naturally high in **Russia**, but this is paired with predominantly **negative sentiment**.

Top Ranks for Latvia								
Familiarity			Reputation			Influence		
Market of Research	Score	Rank	Market of Research	Score	Rank	Market of Research	Score	Rank
Lithuania	9.9	1	Ukraine	8.3	21	Lithuania	7.0	15
Estonia	9.7	4	Azerbaijan	7.8	22	Ukraine	7.2	16
Ukraine	8.4	22	Lithuania	8.1	23	Estonia	6.3	19
Finland	7.6	23	Estonia	7.7	27	Georgia	6.5	22
Russia	8.1	24	Finland	7.2	28	Finland	4.8	25
Kazakhstan	7.6	32	Sweden	7.2	31	Azerbaijan	5.8	26
Poland	6.7	37	Germany	6.7	31	Sweden	4.5	31
Slovakia	6.2	41	Slovenia	7.0	32	Slovakia	4.6	34
Sweden	6.1	43	Netherlands	6.4	32	Poland	4.7	36
Denmark	5.5	44	Slovakia	6.7	35	Denmark	4.1	42
Norway	5.8	45	Poland	6.6	36	Brazil	3.8	43
Czechia	5.8	46	Georgia	7.4	36	Netherlands	3.9	45
Ireland	5.8	46	Norway	6.6	37	Austria	4.0	46
Georgia	7.0	48	Austria	6.7	37	Czechia	4.0	46
Romania	6.3	48	Spain	6.6	37	Germany	3.9	47

# Long-term focus should be on strengthening Latvia's position in major non-European power markets

- Latvia's performance is weakest in geographically distant markets. While building influence will take time, Latvia's reputation could be stronger, especially given its EU membership.
- Priority should **focus on major regional powers, including G20 markets**, where Latvia remains largely off the radar. Improving visibility and goodwill in these markets is important for supporting long-term economic and political ambitions and increasing relevance at a regional level.
- Rapidly developing Middle Eastern markets, notably the **United Arab Emirates** and **Saudi Arabia**, present another opportunity. Their growing global engagement, investment activity and role as trade and logistics hubs make them strategically important markets for strengthening Latvia's presence further.

## Lowest Ranks for Latvia

Familiarity			Reputation			Influence		
Market of Research	Score	Ranks	Market of Research	Score	Ranks	Market of Research	Score	Ranks
Zimbabwe	0.8	182	South Africa	3.2	165	South Africa	1.7	170
Pakistan	1.6	178	Nigeria	3.3	163	Nigeria	1.7	163
Kuwait	3.0	171	Saudi Arabia	3.8	157	Kenya	2.0	151
South Africa	1.9	169	Kenya	3.8	150	India	2.9	145
Morocco	2.2	167	Egypt	4.4	148	Saudi Arabia	2.4	142
Nigeria	2.6	165	UAE	4.6	142	UAE	2.7	137
Zambia	1.7	165	India	5.1	133	Egypt	2.6	134
DRC	1.6	161	Russia	4.1	131	USA	2.9	133
Saudi Arabia	2.8	160	Indonesia	5.1	122	Japan	2.8	128
Kenya	2.8	160	China	5.5	112	Indonesia	2.7	128
Tanzania	2.1	159	Japan	5.1	112	New Zealand	2.4	121
Nepal	1.1	159	Philippines	5.2	105	China	3.2	120
Egypt	3.5	158	Malaysia	5.3	101	Malaysia	3.0	105
Bahrain	3.6	158	Thailand	5.3	98	Thailand	3.0	103
Ghana	2.4	157	USA	5.3	97	Australia	3.1	97

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# Analysis of **Russia's** **Impact** on Latvia's Ranking



# Russian’s perceptions impact on Latvia’s score

Russia has been reintroduced as a research market in the Global Soft Power Index 2025. As expected, this negatively impacts Latvia’s overall performance, in line with Estonia and Lithuania; however, excluding Russia from the modelling still shows year-on-year softening, pointing to a broader trend rather than a single-market effect

	2024 Rank	2025 Rank	Difference to 2024	2025 Rank (without Russia)	Difference to 2024 (without Russia)		2024 Score	2025 Score	Difference to 2024	2025 Score (without Russia)	Difference to 2024 (without Russia)
Colombia	69	61	8	59	10		37.6	39.0	1.4	39.2	1.6
Slovakia	60	60	0	60	0		38.8	39.0	0.2	39.1	0.4
Georgia	54	59	-5	61	-7		39.3	39.1	-0.2	39.1	-0.2
Iran	62	62	0	62	0		38.5	38.9	0.4	39.0	0.5
Cyprus	65	63	2	63	2		38.0	38.9	0.8	38.9	0.9
Estonia	57	65	-8	64	-7		38.9	38.3	-0.5	38.9	0.0
Panama	67	64	3	65	2		37.9	38.7	0.8	38.9	1.0
Malta	68	66	2	66	2		37.9	37.9	0.0	38.1	0.3
Uruguay	66	67	-1	67	-1		37.9	37.7	-0.2	38.0	0.0
Bulgaria	64	68	-4	68	-4		38.1	37.7	-0.4	37.9	-0.3
Lithuania	61	70	-9	69	-8		38.6	37.4	-1.2	37.7	-0.8
Serbia	75	69	6	70	5		36.7	37.4	0.7	37.4	0.7
Costa Rica	70	71	-1	71	-1		37.5	37.1	-0.4	37.3	-0.2
Peru	72	72	0	72	0		37.0	36.7	-0.2	37.0	0.0
Latvia	71	76	-5	73	-2		37.2	36.5	-0.7	36.9	-0.3
Bahamas	88	74	14	74	14		34.9	36.6	1.7	36.8	1.9
Cuba	74	73	1	75	-1		36.8	36.7	-0.1	36.7	-0.1
Nigeria	79	77	2	76	3		36.3	36.4	0.2	36.6	0.3
Algeria	73	78	-5	77	-4		36.8	36.4	-0.4	36.5	-0.3
Tunisia	77	79	-2	78	-1		36.6	36.3	-0.3	36.5	-0.1

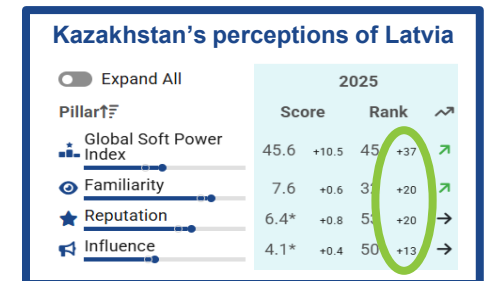


# Other high-weight markets added pressure on scores

This year's decline is also partly driven by softer perceptions in several high-weight markets, including India, Turkey, and Nigeria. Reassuringly, some of this has been offset by improvements in other large markets such as China, as well as smaller markets, including Lithuania, Estonia, and Kazakhstan

Market Ranking by Weight	Market	Weight	Soft Power Score Change
1	India	10.05%	-1.9
2	China	4.80%	2.9
3	Russia	3.36%	-7.2
4	United States	3.08%	0.1
5	Ukraine	2.27%	1.9
6	Indonesia	2.23%	1.1
7	Germany	1.71%	1.5
8	Lithuania	1.59%	3.2
9	Turkey	1.56%	-3.4
10	Brazil	1.51%	2.1
11	Estonia	1.50%	5.4
12	Italy	1.49%	2.5
13	Nigeria	1.49%	-3.0
14	Poland	1.48%	2.0
15	Kazakhstan	1.45%	10.5

- Due to its large population and high familiarity with Latvia, **Russia** remains one of the top contributors to Latvia's overall score. However, long-standing political tensions mean perceptions are unlikely to be positive, while still carrying significant weight. With familiarity in other high-weight markets remaining relatively low, Latvia has limited ability to offset this negative impact.
- High-level engagements, such as talks with **Türkiye** in late 2024 on NATO, security and economic cooperation, present clear opportunities to raise visibility in key markets and regions, provided they are communicated beyond diplomatic and specialist audiences to reach a wider public.
- Latvia should focus more deliberately on **major regional powers**, including G20 markets, where it remains largely off the radar. Building visibility in these markets will help increasing regional and global familiarity and drive relevance.
- Improved perceptions of Latvia in **Kazakhstan** in 2024 likely reflect closer bilateral engagement and increased visibility. In May 2024, Latvia hosted a meeting of the Kazakhstan-Latvia Intergovernmental Commission in Riga, focusing on trade, transport, investment, and tourism cooperation, signaling a deepening of economic and political ties. This was reinforced by Kazakhstan's broader efforts to diversify partnerships towards stable EU member states.



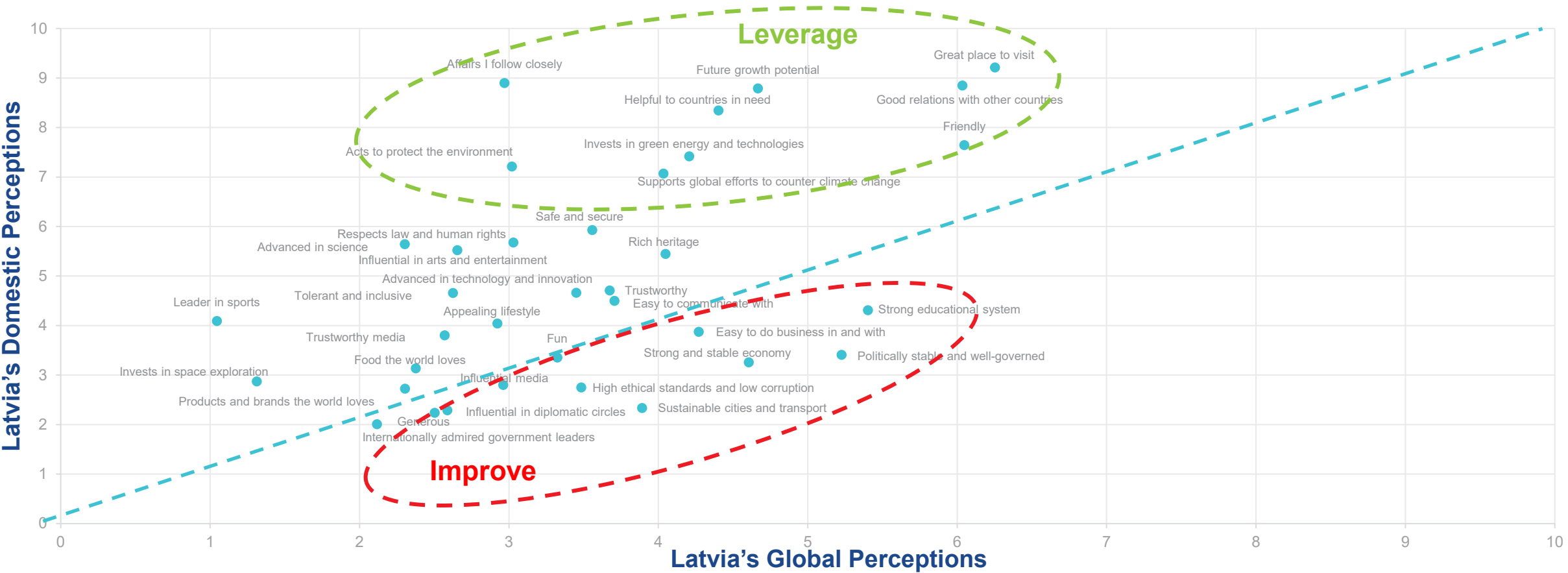
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# Latvia's Domestic Perceptions



# Latvians rate global responsibility and future potential higher than the world, but are less confident about everyday prosperity

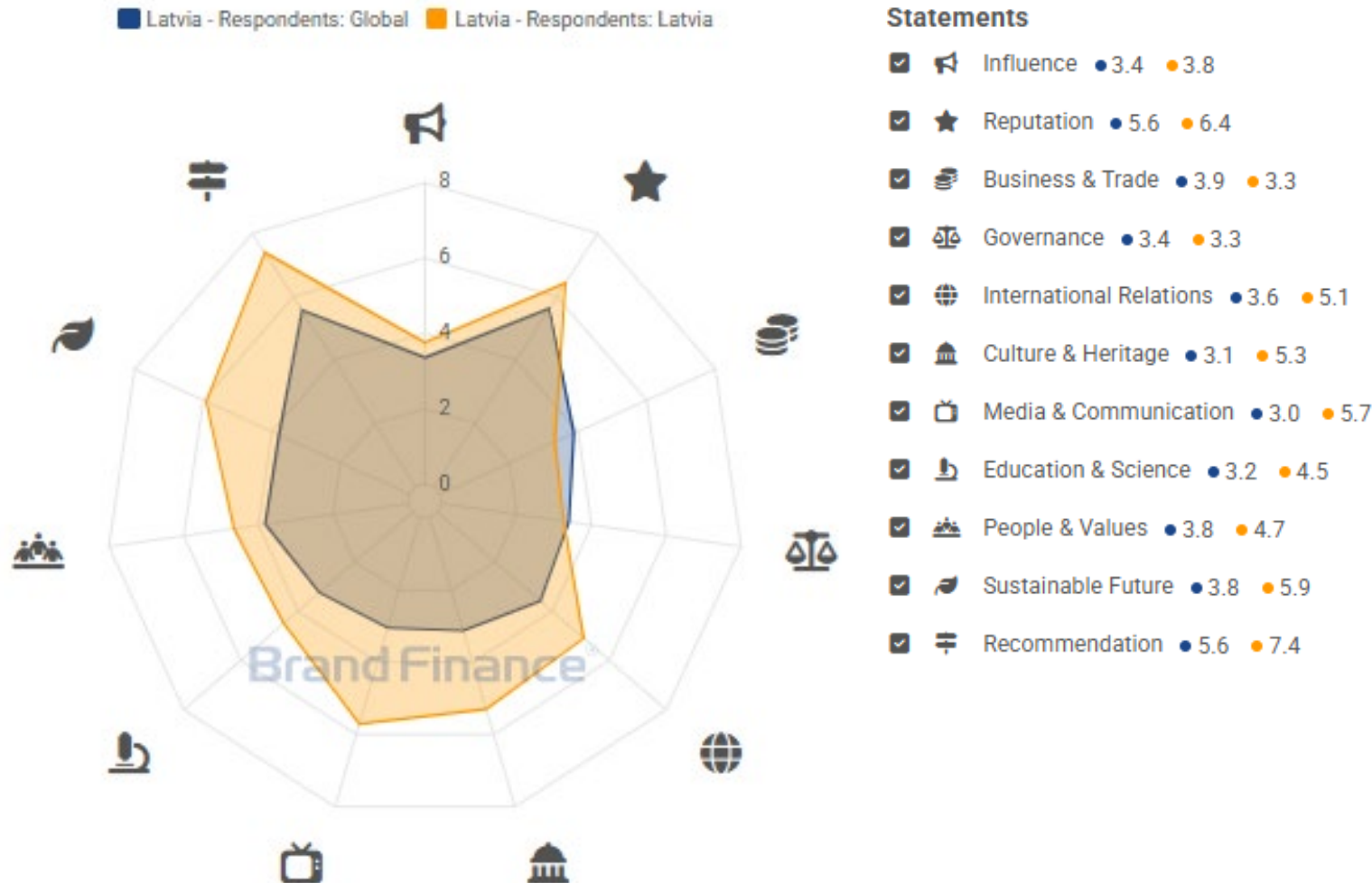
Latvians tend to rate the country more positively than international audiences on environmental action, global cooperation, ethics, friendliness, and future growth potential. By contrast, economic strength, political stability, ease of doing business, education, and lifestyle are viewed more favourably abroad than at home, suggesting domestic underconfidence that can undermine word-of-mouth advocacy





# Latvia sees stronger perceptions at home than abroad

This is the case with most nation brands and points to potential in improving soft power long-term as residents are every nation's best ambassadors abroad



**Across most metrics, domestic perceptions of Latvia are stronger than international ones.**

- This suggests either untapped potential to improve international perceptions by better communicating existing strengths, or a degree of overestimation among residents that should be addressed through more realistic domestic narratives.

**For Reputation and Influence, perceptions at home and abroad are relatively aligned, although still marginally stronger domestically.**

- This narrower gap indicates limited scope to leverage residents as ambassadors for significantly improving international perceptions in these areas.

**In Business & Trade and Governance, perceptions are weaker domestically than internationally.**

- This points to domestic underconfidence and signals a risk: without targeted policy action and clearer communication at home, these weaker internal perceptions could eventually undermine Latvia's external reputation.

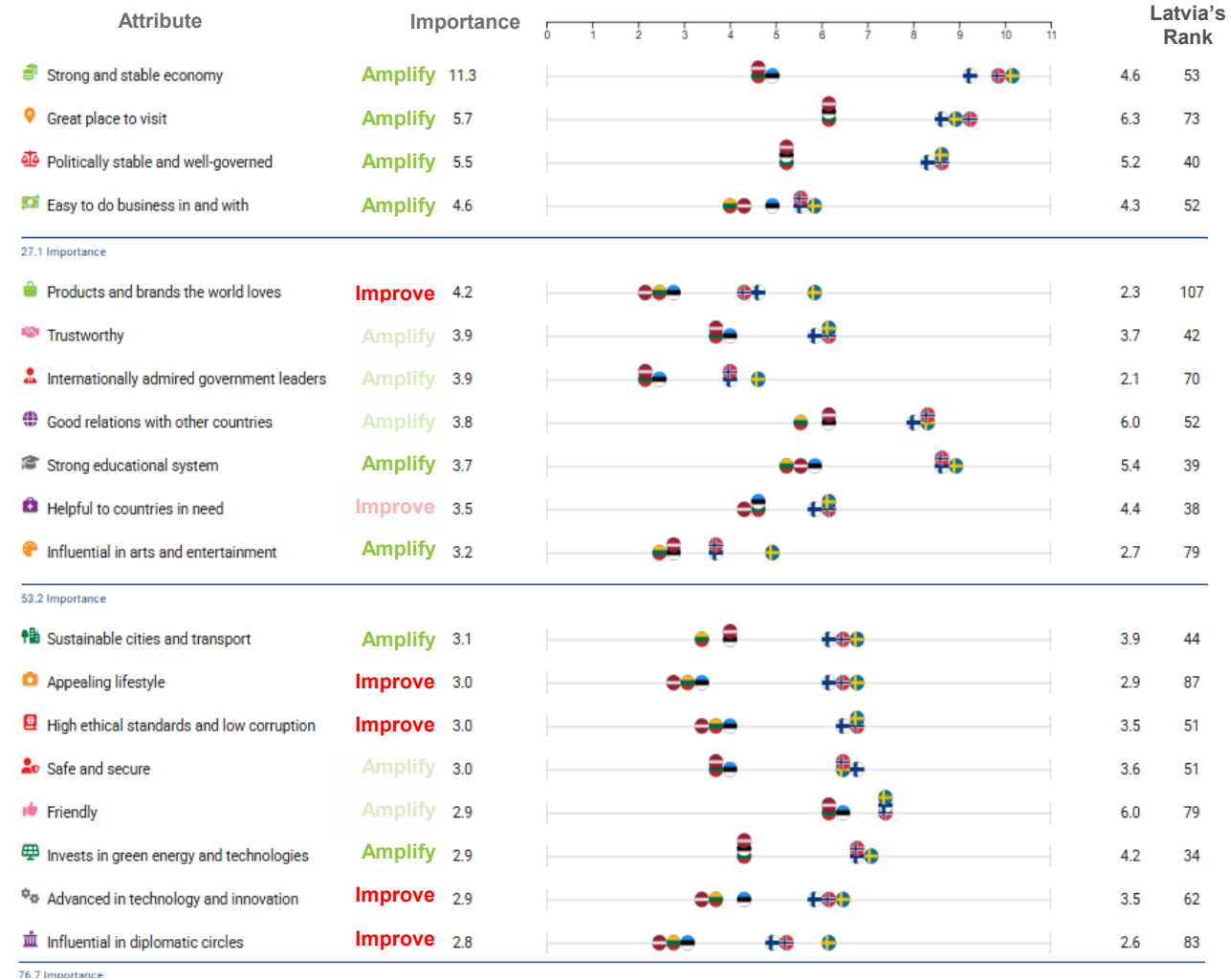
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# Global Drivers of Reputation & Influence



# Drivers of Reputation vs Latvia's Global Perceptions

Governance and Business as well as Innovation and Sustainability should be the core pillars of a strategy to strengthen Latvia's soft power. Culture and Tourism too are an important factor in building Reputation in particular



## Governance and Business:

- Latvia is seen as a **stable and well-governed** country, a foundational strength that often underpins positive perceptions across other dimensions and warrants continued emphasis. However, perceptions of **ethical standards and low corruption** lag slightly behind peers, while greater **diplomatic visibility** could help strengthen confidence.
- Improving these perceptions would support stronger economic credibility, helping Latvia more effectively communicate **ease of doing business**, where it already outperforms Lithuania. At the same time, **products and brands** remain a clear gap versus both peers, suggesting a need for more active promotion of Latvia's commercial offer.
- With its central location and relatively well-developed transport infrastructure, Latvia has strong potential to be perceived as a leading **trade hub in the Baltics**.

## Innovation and Sustainability:

- Latvia can attract further investment and collaboration by building on its relatively strong **sustainability credentials**, particularly in sectors where environmental considerations are increasingly central.
- A solid reputation for **education** also reinforces perceptions of a skilled workforce with the expertise needed to deliver on strategic commitments. Strengthening perceptions around **advanced technology and innovation**, where Latvia currently trails both Baltic peers, would further enhance its attractiveness for knowledge-intensive and future-oriented investment.

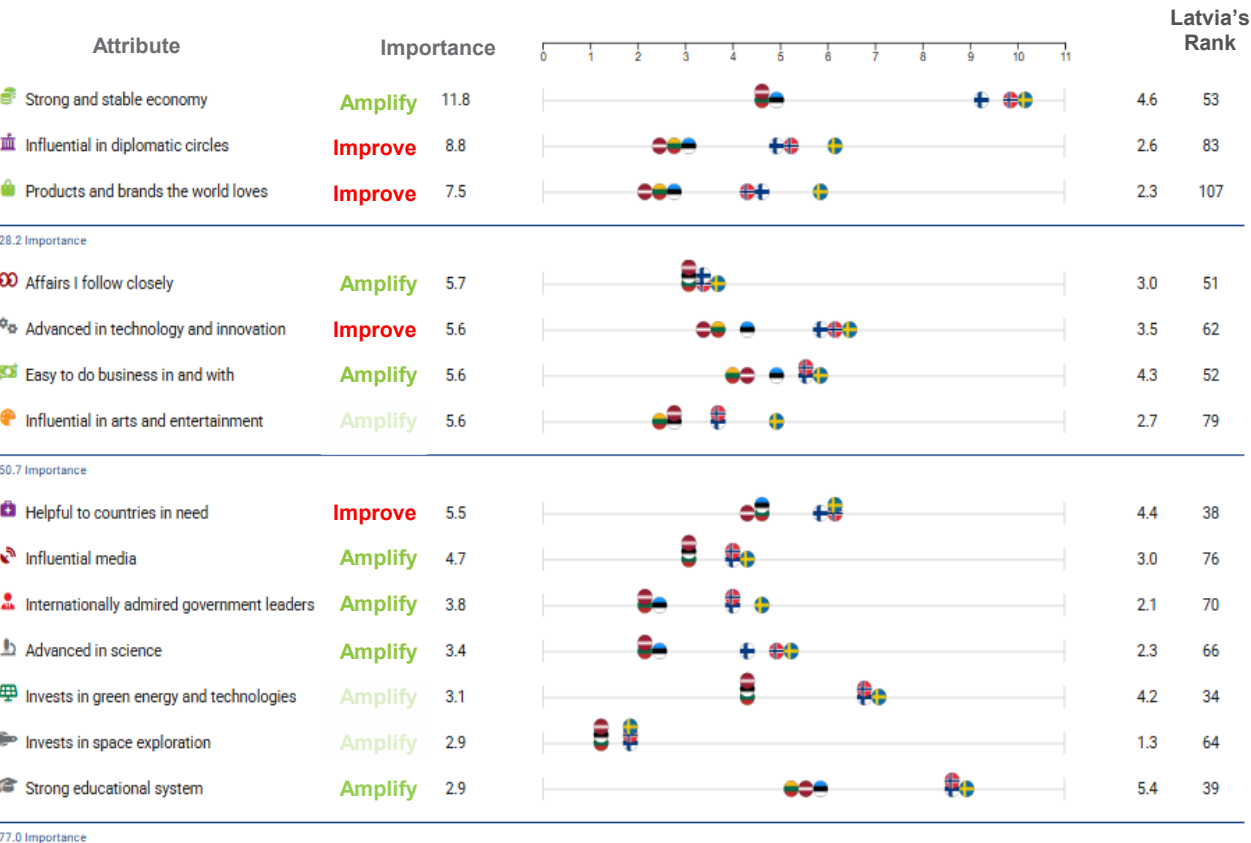
## Culture and Tourism:

- Building stronger cultural distinctiveness and personability will be key to making Latvia more memorable and relatable, and to strengthening its reputation through its culture and people. Latvia has an opportunity to lead the Baltics as a **friendly, great place to visit** as well as in **arts and entertainment**, while weaker perceptions of **lifestyle appeal** suggest that greater coherence and visibility across culture, creativity, and everyday life could help Latvia present a more compelling and human-centred story internationally.



# Drivers of Influence vs Latvia's Global Perceptions

In alignment with the Reputation-building strategy, similar dimensions around Economy and Business as well as Innovation and Science serve as key levers for expanding Influence. International Engagement is also crucial



## Economy and Business:

- As with reputation, perception of a **strong and stable economy** is a key driver of international influence. While Latvia's relatively small economic size creates certain constraints, this need not limit how **stability** is perceived externally.
- A consistently **business-friendly** environment, the promotion of credible **national brands and products**, and a stronger **presence in diplomatic and international policy circles** can all help reinforce an image of economic confidence and reliability.

## Innovation and Science:

- Being small should also not stand in the way of projecting **technological ambition**. Estonia's experience illustrates this well. Often described as a 'digital unicorn', Estonia has built its reputation through tangible achievements such as nationwide e-government services, e-residency programme, etc., which has attracted entrepreneurs from around the world. These initiatives have helped position Estonia as a digital leader not despite its size, but partly because focus and ambition compensated for limited scale.
- With a solid **education system** and a strong **scientific foundation**, Latvia has no inherent reason not to strengthen its narrative around technology, innovation and future-oriented growth. National companies such as airBaltic, MikroTik and Aeronas already demonstrate this ambition and, with greater visibility and effective promotion, can play a meaningful role in enhancing Latvia's international appeal

## International Engagement:

- International engagement and media presence are particularly important in the current European security environment, and this is an area where Latvia has clear potential to strengthen its positioning on the global stage and further drive its Influence. Latvia currently trails its Baltic peers in perceived **influence within diplomatic circles**, while there is a clearer opportunity to take the lead in **influential media** and to build greater **admiration for its government leadership**.



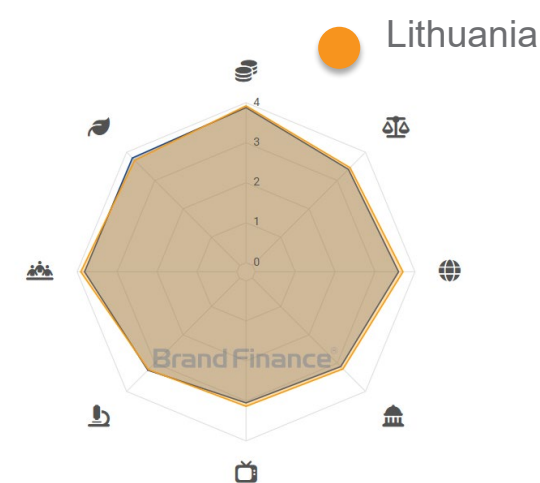
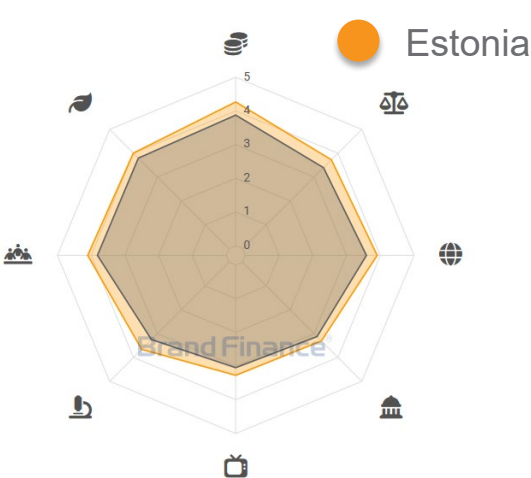
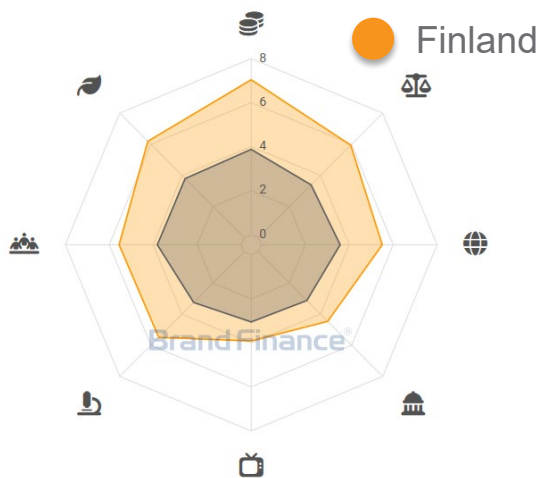
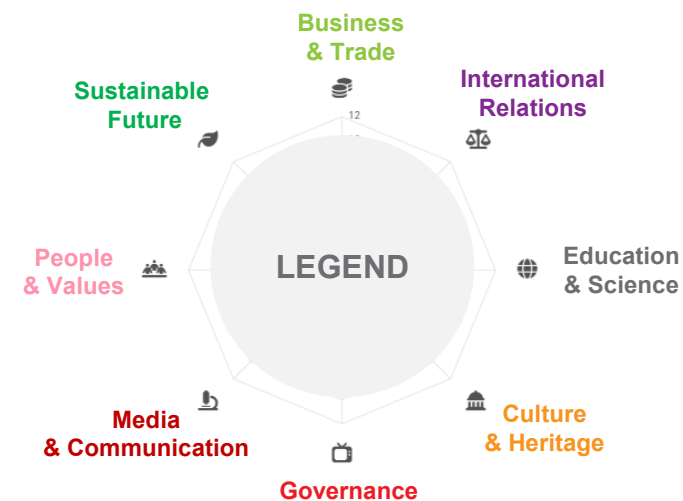
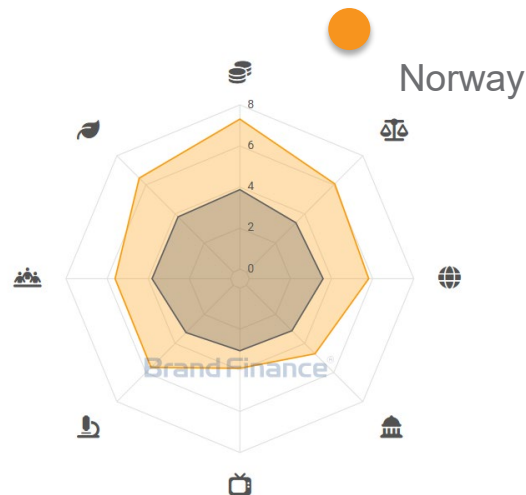
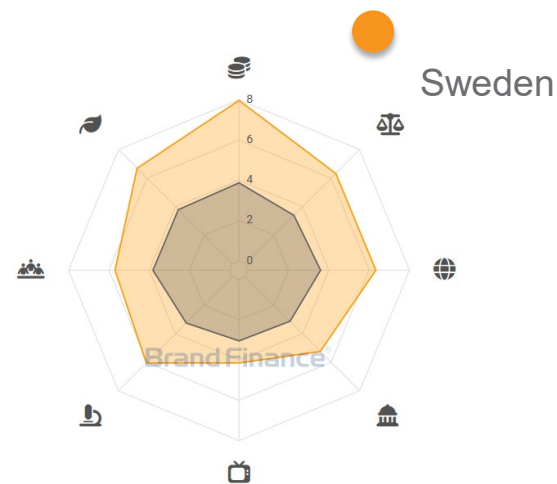
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# Latvia's Attribute Perceptions

















# Soft Power Pillar Perceptions vs Benchmark Nations

Latvia's scores are generally the lowest out of the benchmarks, almost tying with Lithuania. What lessons can be learnt from Estonia and Nordic benchmarks' performance to help you gain a competitive edge?



# Soft Power Pillar Perceptions vs Benchmark Nations

The Nordic nations set a very high benchmark that none of the Baltic states currently match. Within the Baltics, Latvia tends to rank towards the lower end across most pillars, with the exception of Education & Science and Sustainable Future, where it marginally outperforms Lithuania

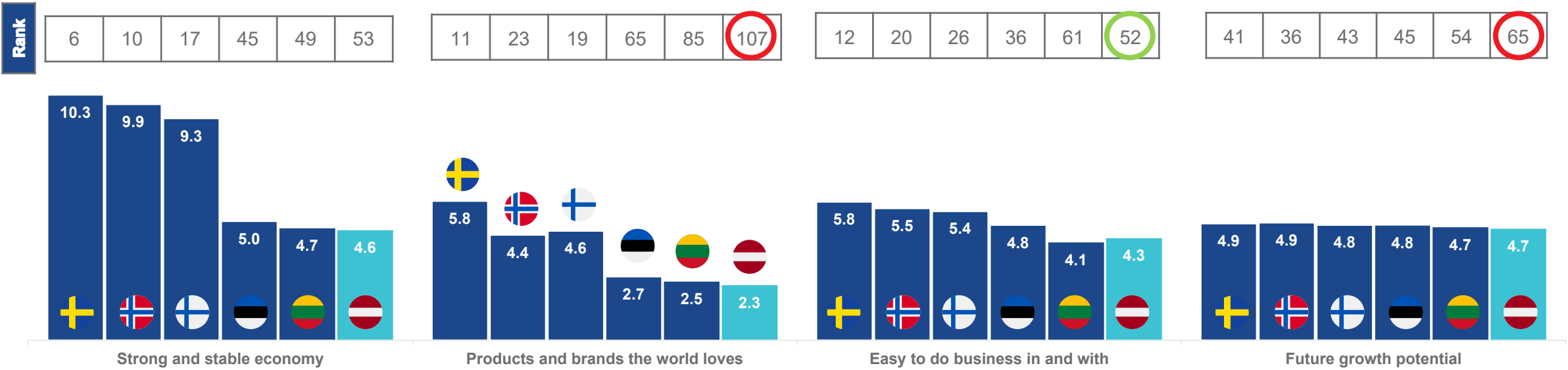
Nation Brand	 Business & Trade	 International Relations	 Education & Science	 Culture & Heritage	 Governance	 Media & Communication	 Sustainable Future	 People & Values
	7	10	11	19	6	15	3	4
	16	17	13	29	7	21	5	5
	18	21	17	34	8	20	9	6
	47	45	37	78	40	41	33	56
	59	53	52	89	46	55	42	72
	62	58	50	95	47	61	38	84

# Business & Trade Pillar vs Benchmark Nations



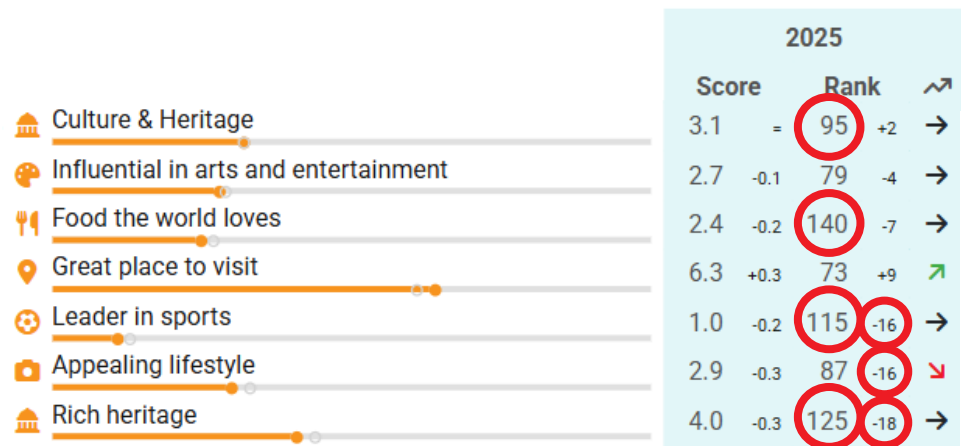
2025					
Score		Rank			
3.9	-0.2	62	-4	→	
4.6	=	53	+4	→	
2.3	-0.2	107	-25	→	
4.3	-0.5	52	-16	↓	
4.7	=	65	+6	→	

- Latvia generally **underperforms its Baltic peers** on the Business & Trade pillar, with ease of doing business the only area where it scores higher than Lithuania. If Latvia is to pursue a positioning as the Baltics' trade hub, this pillar will require a focused, coherent and well-sequenced strategy.
- Well-known national products and brands play a critical role in shaping reputation, influence and personal familiarity. Yet **products and brand associations are currently the weakest** element of this pillar for Latvia, making it a clear priority. Encouragingly, Latvia already has recognisable national brands, such as Riga Black Balsam and Riga Sprats, that could be more effectively leveraged to strengthen international recognition.
- While Latvia trails its Baltic peers in relative terms, **the absolute gaps are small**. This suggests that even **incremental improvements could meaningfully lift Latvia's** international standing and increase its visibility and salience globally.

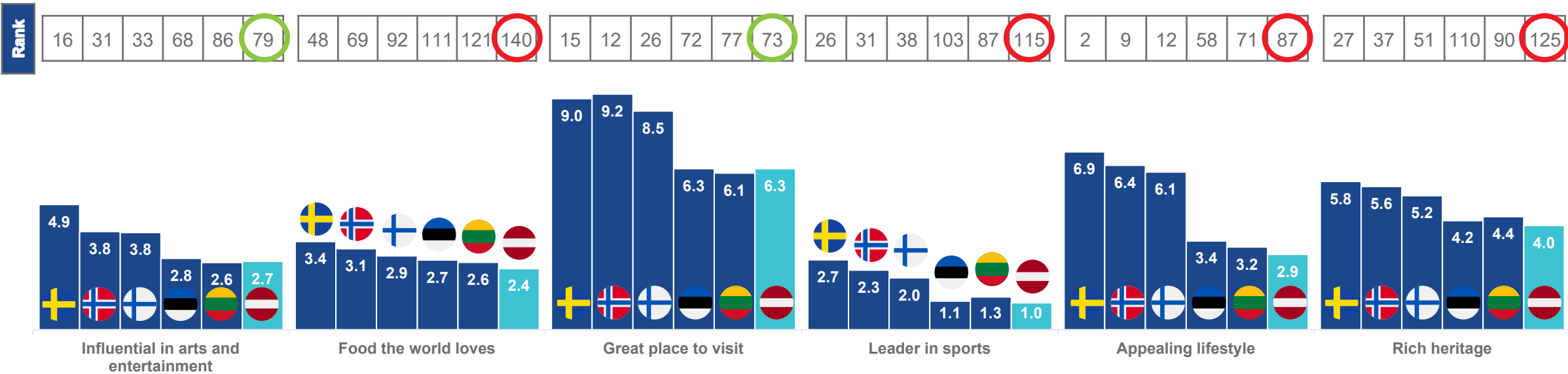




# Culture & Heritage Pillar vs Benchmark Nations



- Culture & Heritage has long been Latvia's **weakest pillar**, just placing within the global top 100. Perceptions of **leadership in sport**, **rich heritage** and **food** the world loves fall outside this range and have declined year on year, pointing to low and relatively shallow familiarity when it comes to these areas. This highlights the need for more focused, culture-led initiatives.
- More positively, **great place to visit** is Latvia's highest-scoring attribute across the Index in terms of level of association (6.3 out of 10), signalling clear goodwill and an established positive perception to build on. Competitively though, while ahead of Lithuania and on par with Estonia, globally Latvia ranks only 73rd. In **arts and entertainment**, competitively it is a similar story, but associations are much lower. Clearer promotion of cultural assets and the unspoilt coastline could help capitalise on these strengths better.
- Latvia's strongest sporting moments, including bronze at the 2023 IIHF Ice Hockey World Championship, boosted visibility and national pride but have not translated into stronger perceptions of sporting leadership, suggesting under-communication. A **broader narrative** spanning basketball, athletics, BMX and rallying **could better reflect Latvia's sporting depth and ambition**.



# Familiarity grows over time through everyday encounters

From Hollywood films and Italian food staples like Parmesan to global brands like Chanel, everyday encounters often shape perceptions of nations and people more than news

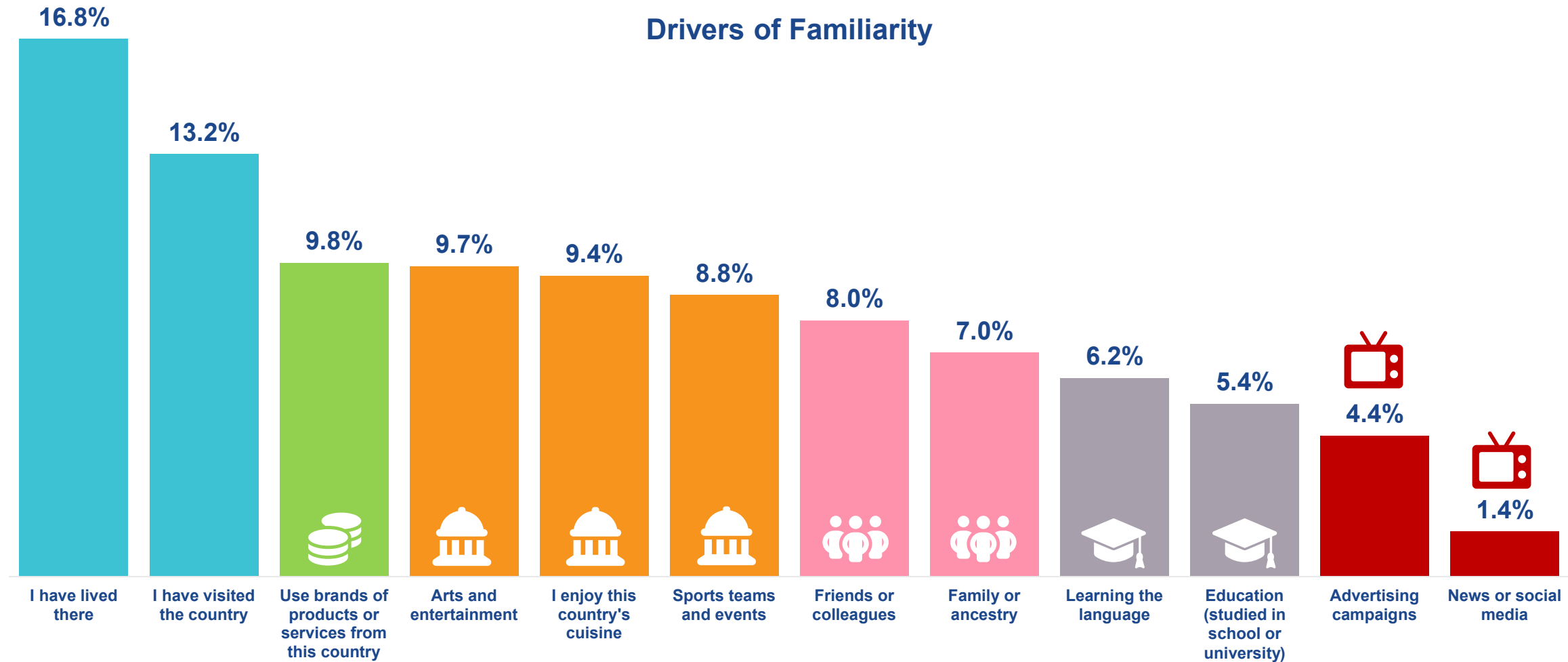
For Latvia, products and brands can serve as everyday ambassadors, building familiarity through repeated, often subconscious encounters, particularly when Latvian origin is clearly signaled in the product name and storytelling.

- Food and drink are often the first and most tangible ways people experience a country, especially if they have never visited it. Brands such as Laima Chocolate, Rīgas Melnais balzams (Riga Black Balsam), Riga sprats (šproti), and Ādažu Čipsi are already well known across parts of Central and Eastern Europe and combine strong recognition with the quality and flavour needed to appeal to wider international audiences.
- Products such as rupjmaize and sklandrausis go beyond food alone, embodying deep-rooted traditions and Latvia's culinary heritage. The recognition of sklandrausis at EU level as a Traditional Speciality Guaranteed reinforces its cultural significance and provides external validation that can be more actively leveraged internationally.
- Traditional crafts and design offer another distinctive entry point. Folk textiles and amber jewellery reflect a living cultural identity and long historical continuity shared across the region. While these elements are not unique to Latvia alone, they offer valuable assets for storytelling and present an opportunity to anchor the country's cultural proposition within a wider Baltic context, while also expressing a distinctive Latvian voice and contemporary identity through how they are framed and presented.
- Even a single, distinctive dish, whether universally loved or more polarising, can become a powerful national calling card. Lithuania's šaltibarščiai illustrates how a clearly owned culinary symbol can spark curiosity and create strong product-nation associations, suggesting a similar opportunity for Latvia to define and promote its own unmistakable cultural signatures.

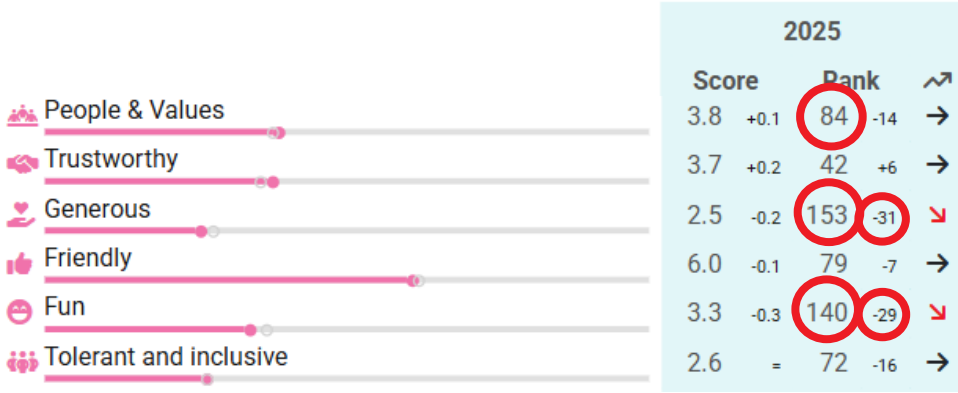


# Drivers of Familiarity

Our recent pilot analysis shows that, beyond living in or visiting a country, familiarity is mainly driven by factors such as Culture & Heritage and perceptions of people and values. As these have been weaker areas for Latvia, they offer a clear opportunity to strengthen international familiarity through targeted cultural and value-led engagement

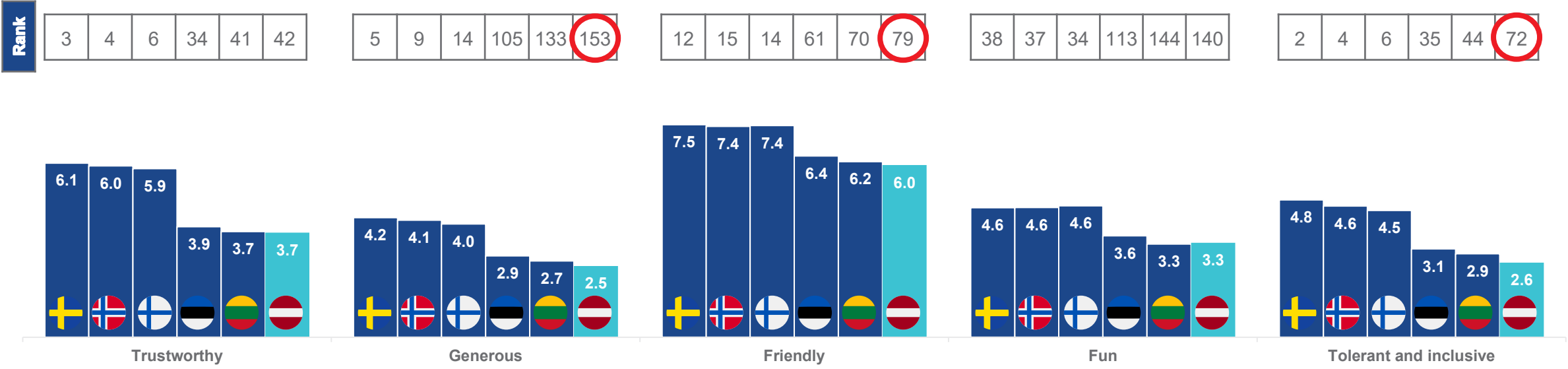


# People & Values Pillar vs Benchmark Nations



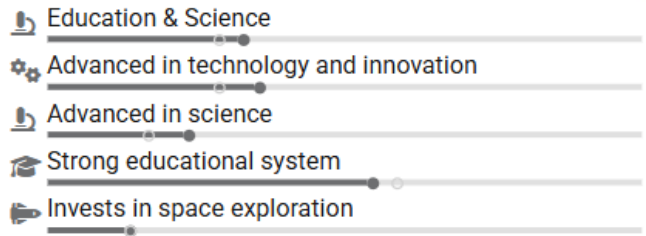
➤ People & Values is Latvia's **second-weakest pillar overall**, with perceptions of fun and generosity falling well outside the global top 100, alongside relatively weak performance on friendliness, tolerance and inclusivity. This appears misaligned with Latvia's sustained support for Ukraine and its role as a safe base for journalists, artists and civil society figures displaced from Russia and Belarus, including the hosting of independent Russian-language media such as Meduza. Such actions would typically strengthen perceptions of openness, generosity and social inclusion - indicating that a more vocal and visible articulation of these efforts could help improve international awareness and perception.

➤ At the same time, **high-profile debates around minority status**, non-citizenship and residency rules tend to attract more attention than quieter progress, softening perceptions of tolerance despite existing legal protections.



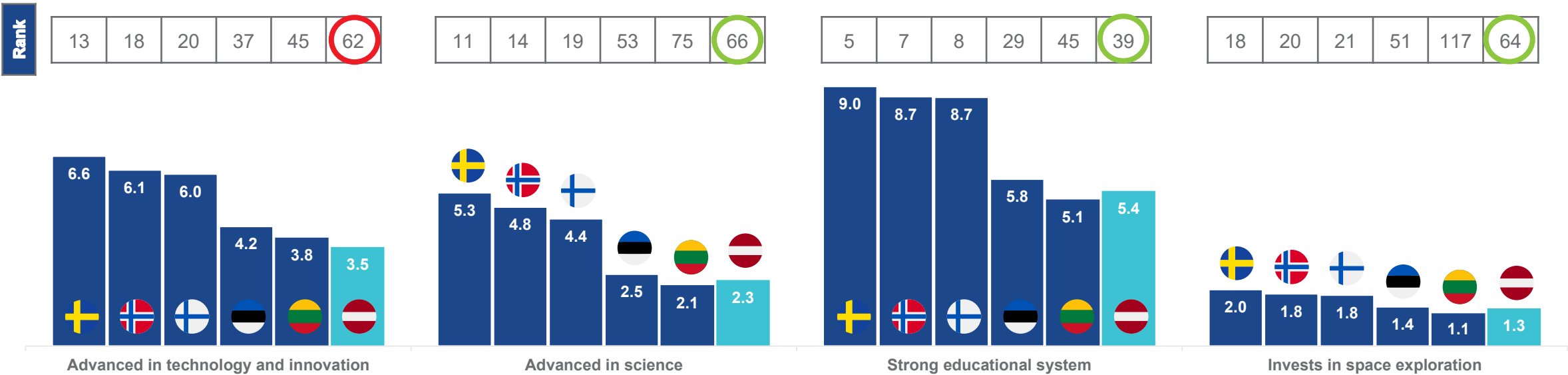


# Education & Science Pillar vs Benchmark Nations

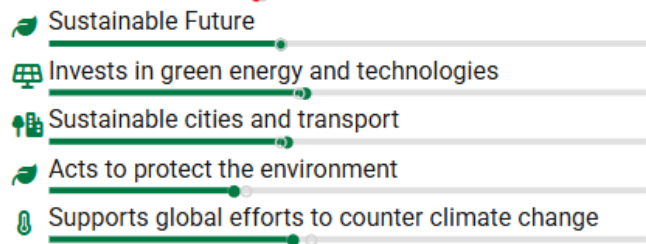


2025					
	Score		Rank		
Education & Science	3.2	+0.4	50	=	→
Advanced in technology and innovation	3.5	+0.7	62	+6	→
Advanced in science	2.3	+0.7	66	+9	→
Strong educational system	5.4	-0.4	39	-6	→
Invests in space exploration	1.3	=	64	+32	→

- **Education & Science is Latvia's strongest pillar relative to its Baltic peers.** Latvia ranks ahead of Lithuania on perceptions of a strong education system and advancement in science and shows clear potential to close the gap with Estonia. This creates a strong foundation on which to further elevate these associations and build a distinct competitive edge.
- Despite this, perceptions of **advanced technology and innovation lag behind.** While Education & Science are recognised, these strengths are not yet translating into a clear innovation narrative, suggesting a gap between capability and communication.
- Strengthening links between research, start-ups and commercially successful technologies, and **showcasing Latvia's companies** like MikroTik, Printful, airBaltic, Aeronas and Tilde, would not only strengthen the nation's visibility but also associations with practical innovation, digital entrepreneurship and future-focused growth.



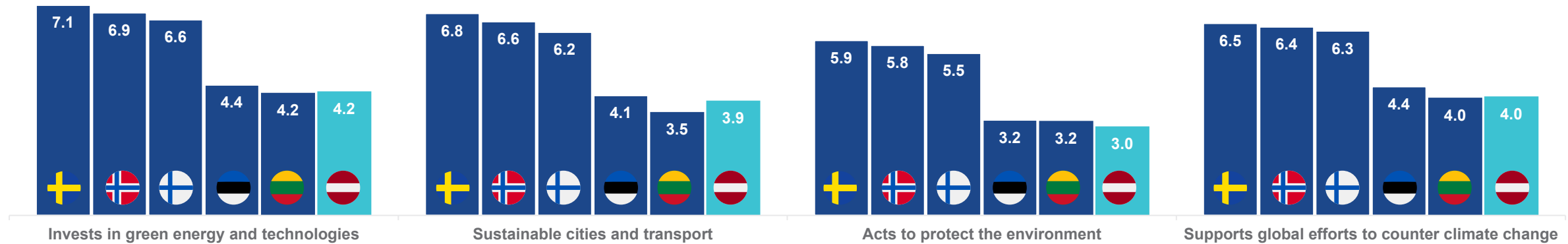
# Sustainable Future Pillar vs Benchmark Nations



2025					
Score		Rank			
3.8	=	38	+4	→	
4.2	+0.1	34	+3	→	
3.9	+0.1	44	-1	→	
3.0	-0.2	61	-10	↓	
4.0	-0.3	37	-4	→	

- Latvia holds relatively **strong sustainability associations**, slightly outperforming Lithuania on investment in green energy and technology, sustainable cities and transport, and support for global climate action, providing a strong platform on which to build an eco-responsible national image.
- Perceptions of **concrete environmental protection actions** are the only area falling outside the global top 50, pointing to a clear opportunity to strengthen credibility by better showcasing tangible outcomes. Environmental efforts are often communicated through the lens of meeting EU requirements, **signalling responsibility rather than ambition**. By articulating a clearer stewardship narrative and leading with visible results rather than processes, Latvia could more effectively convert real environmental action into stronger international recognition.

Rank



# Sustainability as a credible growth and reputation lever

From green innovation to eco-tourism and responsible brands, Latvia has strong foundations to reinforce and leverage an eco-responsible national image

## Clean energy innovation and practical solutions

- Companies such as Recolo, Koffeeco and Aeronex, which develops robotic technology for wind turbine maintenance, position Latvia as a source of applied green innovation with real-world impact.

## Ecosystem support and signalling

- Platforms such as Green-Tech Latvia translate sustainability ambition into action by connecting green-tech companies, research institutions and policymakers, supporting commercialisation, and promoting Latvian solutions internationally. This helps turn environmental commitments into visible economic activity and reinforces Latvia's credibility as a practical, solutions-driven green economy.

## Eco-tourism rooted in nature

- Latvia's protected forests, national parks and nature-led travel experiences underpin strong associations with environmental stewardship, wellbeing and sustainable lifestyles.

## Sustainable mobility and slow tourism

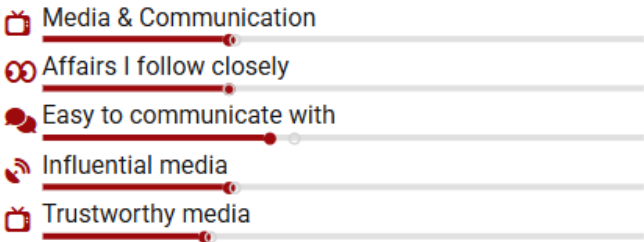
- Growing interest in train and bus travel aligns well with Latvia's accessibility by rail. The Rail Baltica project, connecting Estonia, Latvia, Lithuania and Poland, creates a clear opportunity to position Latvia as a gateway for sustainable, slow and eco-tourism across the Baltics, attracting higher-value, more conscious travellers.

## Sustainability-led national brands

- Brands such as MÁDARA Cosmetics, STENDERS, sustainable fashion labels like Baiba Ladiga and Zīle-Zīle, and food producers such as Lat Eko Foods (Rūdolf) and other "Latvijas Ekoprodukts" label holders help anchor Latvia's image in nature, wellbeing and responsible production.

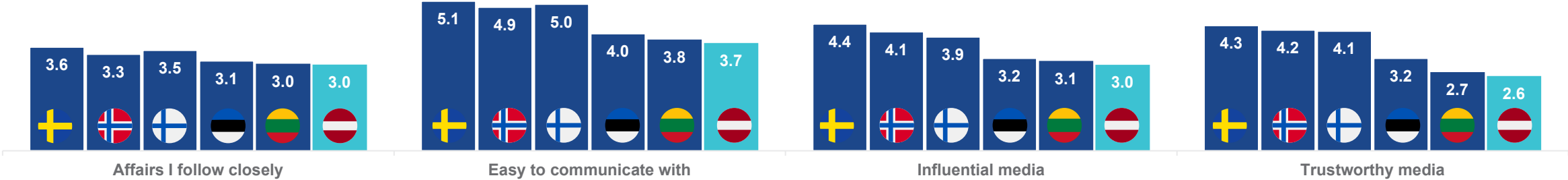


# Media & Communication Pillar vs Benchmark Nations



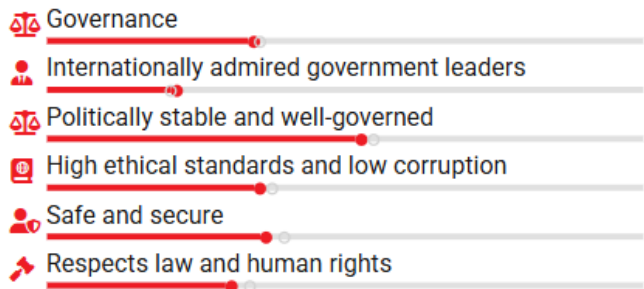
2025					
Score		Rank			
3.0	-0.1	61	-11	↘	
3.0	=	51	+2	→	
3.7	-0.4	81	-21	↘	
3.0	-0.1	76	-4	→	
2.6	-0.1	35	-3	↘	

- Media & Communication is one area where the **Baltic states compete more closely with the Nordics**, supported by their clear **stance on the Russia-Ukraine war** and sustained international coverage. While this effect has softened somewhat, it continues to deliver value for Latvia through the credibility gained from its clear political stance. This provides a platform for a more proactive and consistent communications approach, enabling the country to project influence across a broader range of geopolitical and international issues.
- Even so, Latvia trails both Lithuania and Estonia on perceived **media influence**, pointing to the need for a more focused and leading communications role within the Baltic group. Stronger agenda-setting, clearer messaging and more regular engagement with international media could help build influence while reinforcing Latvia's broader reputation and visibility globally.



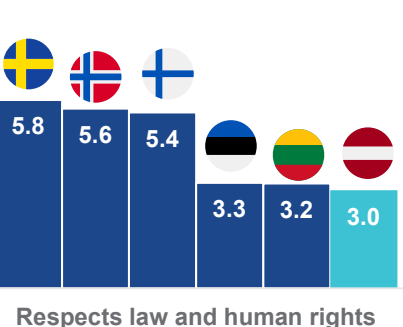
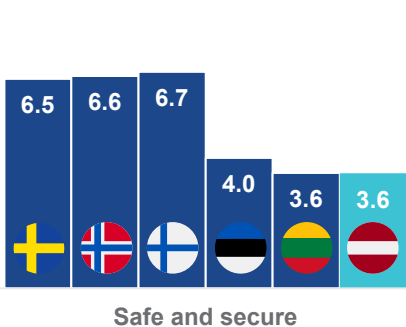
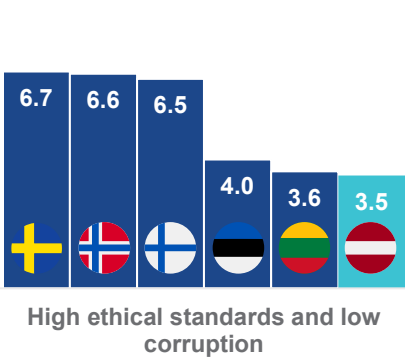
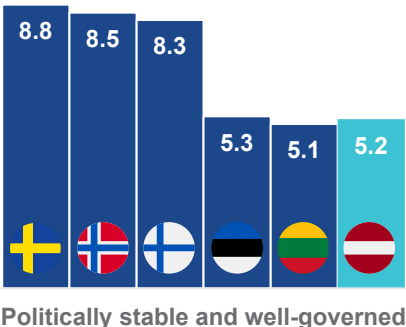
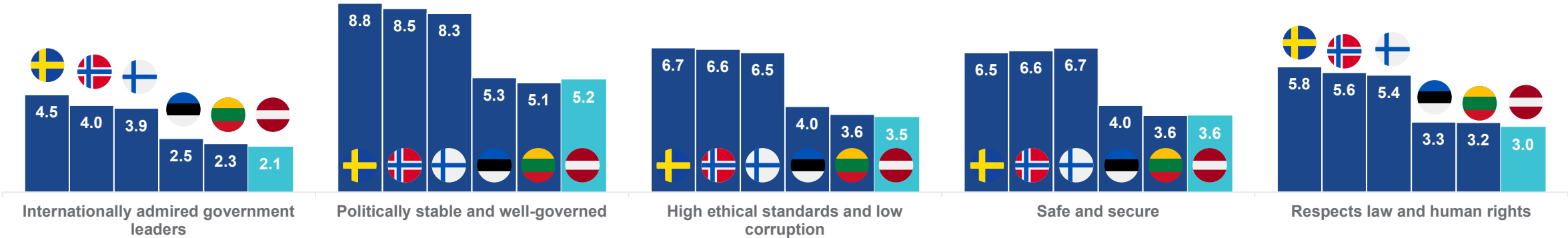
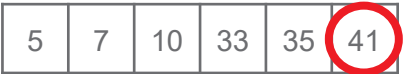


# Governance Pillar vs Benchmark Nations



2025					
	Score		Rank		
Governance	3.4	-0.1	47	-3	→
Internationally admired government leaders	2.1	+0.1	70	-8	→
Politically stable and well-governed	5.2	-0.2	40	-3	→
High ethical standards and low corruption	3.5	-0.2	51	-7	→
Safe and secure	3.6	-0.3	51	-10	↓
Respects law and human rights	3.0	-0.3	41	-4	→

- Latvia is generally perceived as **politically stable and well governed**, slightly outperforming Lithuania, but it underperforms overall among the Baltic states. Perceptions of ethical standards, corruption, and the rule of law and human rights are its weakest associations within pillar, particularly compared with Estonia. Greater visibility of minority-related issues, including the status of non-citizens, has likely contributed to these perceptions, underscoring the need for both continued policy progress and clearer communication of reforms and inclusive Governance.
- **Government leadership** is another area where Latvia trails its peers most clearly, despite similar levels of overall reputation, influence and international visibility. More proactive international engagement, clearer policy positioning and stronger leadership narratives on shared regional and global challenges could help narrow this gap.





















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# Latvia's Perceptions in **Focus Markets**



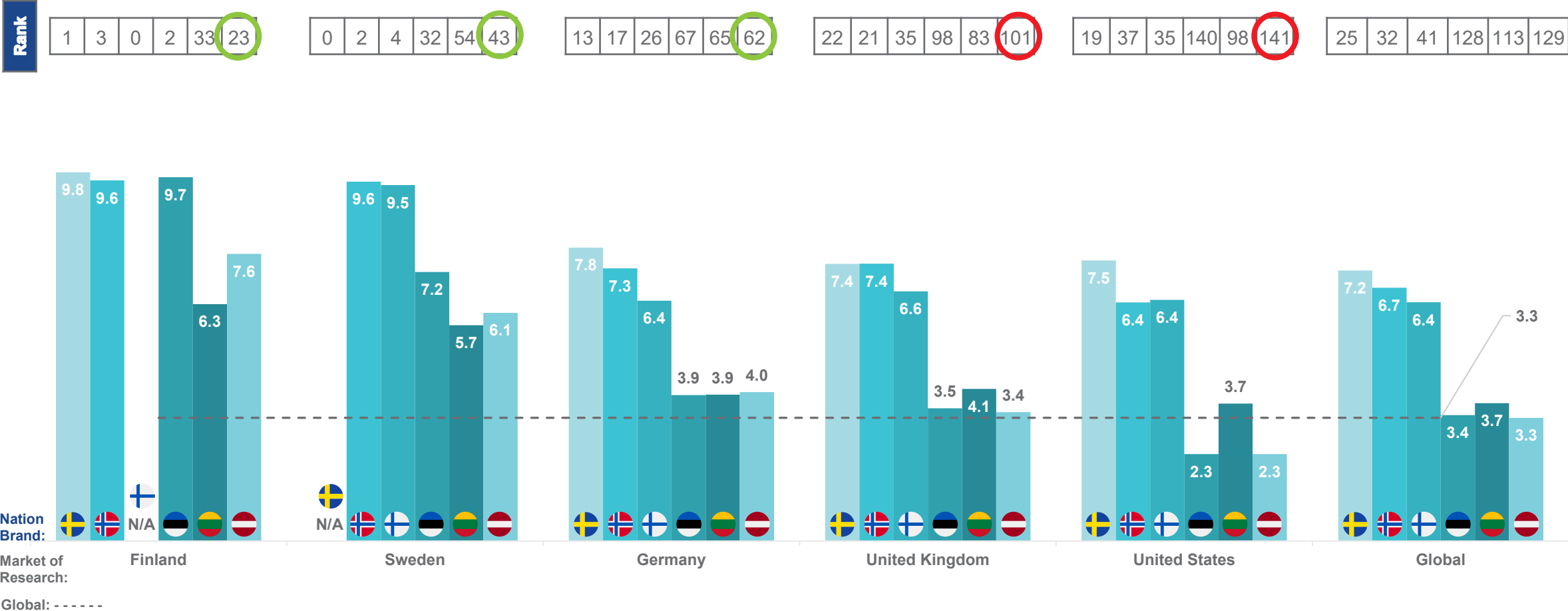
# Latvia's Ranks in Key Target Markets

Latvia's rankings are strongest in geographically closer, more familiar markets such as Finland, Sweden and Germany, while associations weaken in more distant markets like the UK and the US. Governance and Sustainability are Latvia's strongest credentials, while Culture & Heritage present the greatest opportunity for national brand development

Target Market	 Overall GSPI Rank	 Familiarity	 Reputation	 Influence	 Business & Trade	 International Relations	 Education & Science	 Culture & Heritage	 Governance	 Media & Comm.	 Sustainable Future	 People & Values
	76	129	74	88	62	58	50	95	47	61	38	84
	29	23	28	25	39	38	40	54	26	33	25	27
	36	43	31	31	47	39	35	77	36	71	30	33
	41	62	31	47	35	38	39	71	30	44	24	33
	60	101	46	57	52	49	47	88	35	43	44	67
	118	141	97	133	90	72	76	125	88	104	87	95

# Latvia and Benchmark Nations' Familiarity

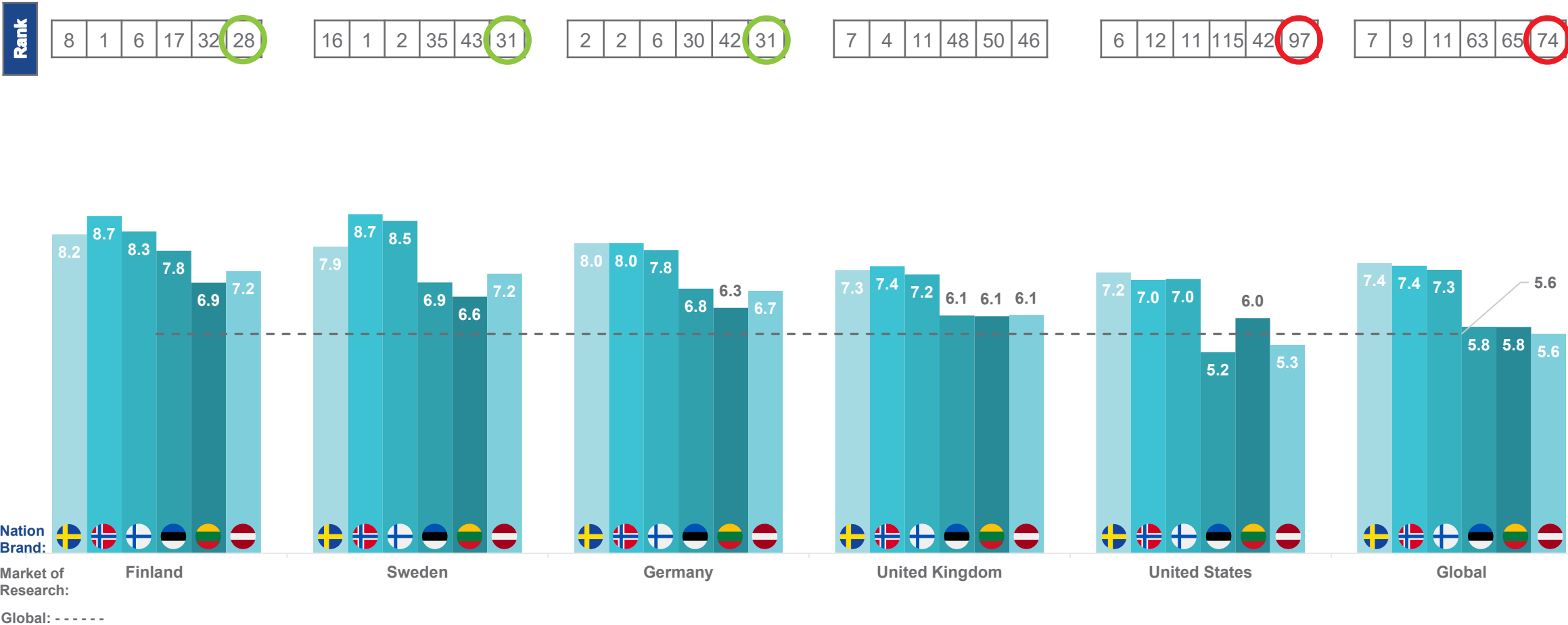
Latvia enjoys relatively strong familiarity in the Nordics, outperforming Lithuania but remaining behind Estonia, and is marginally ahead of its peers in Germany. In the UK and the US, however, familiarity drops sharply, where Lithuania's more visible leadership on the global stage gives it a clear advantage over the other Baltic states





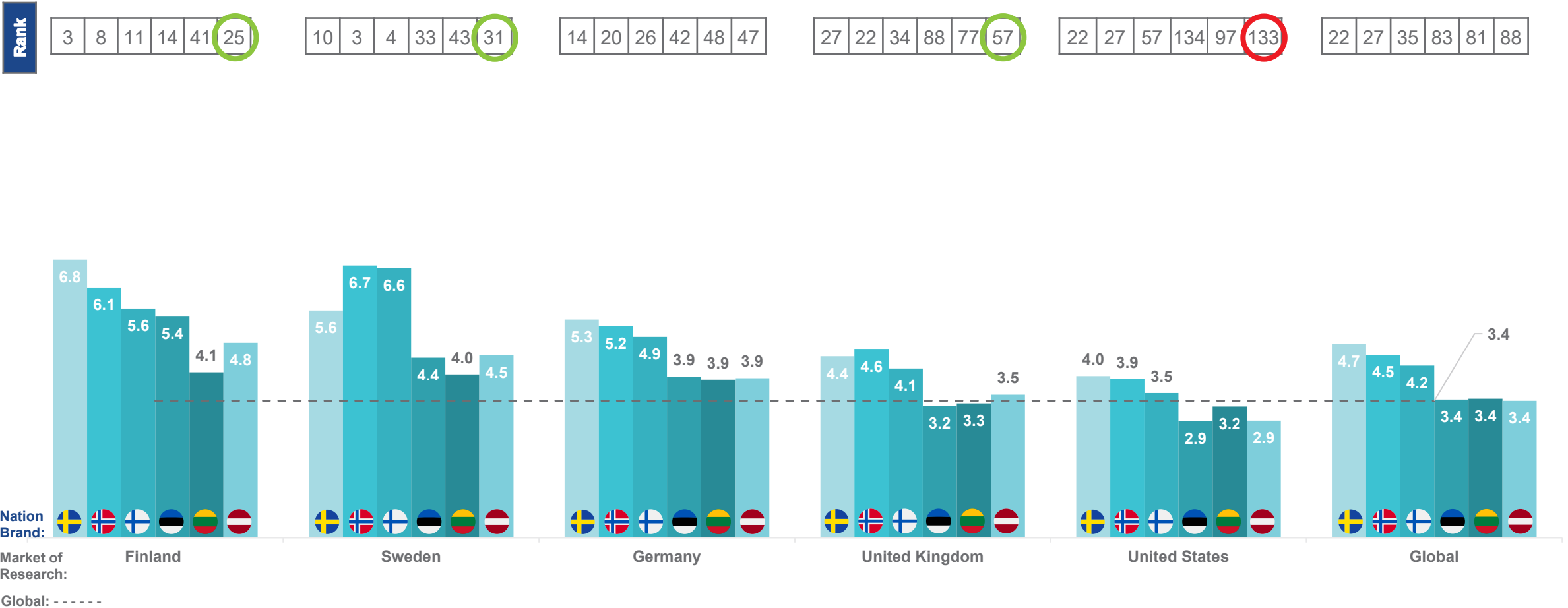
# Latvia and Benchmark Nations' Reputation

A similar pattern is seen in reputation: Latvia leads in Sweden, ranks second to Estonia in Finland and Germany, but weakens in the UK and especially the US, whose global influence weighs heavily on the overall score

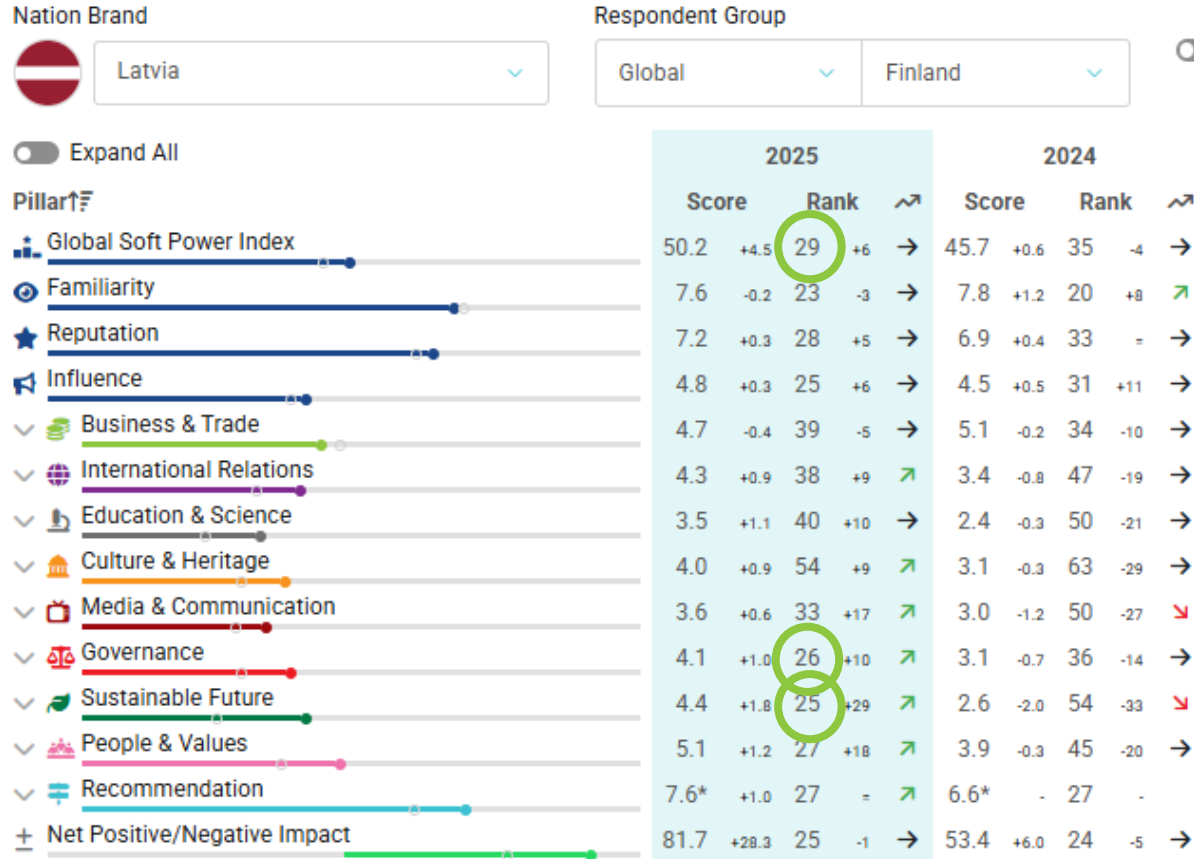


# Latvia and Benchmark Nations' Influence

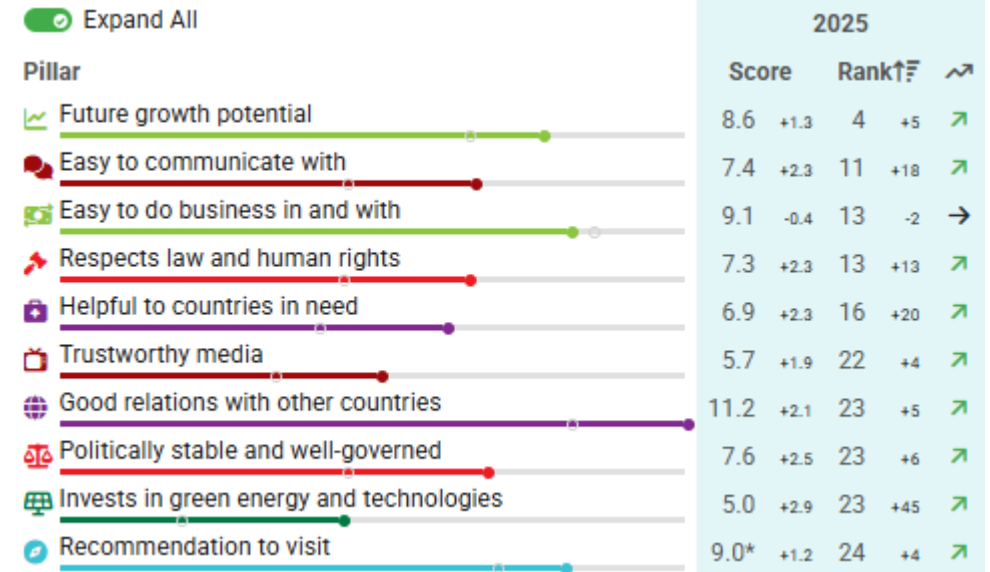
Latvia performs broadly in line with its Baltic peers on influence and is strongest in the Nordics, but influence remains weak in absolute terms, reflecting the region's small size and limited reach beyond its immediate neighbourhood



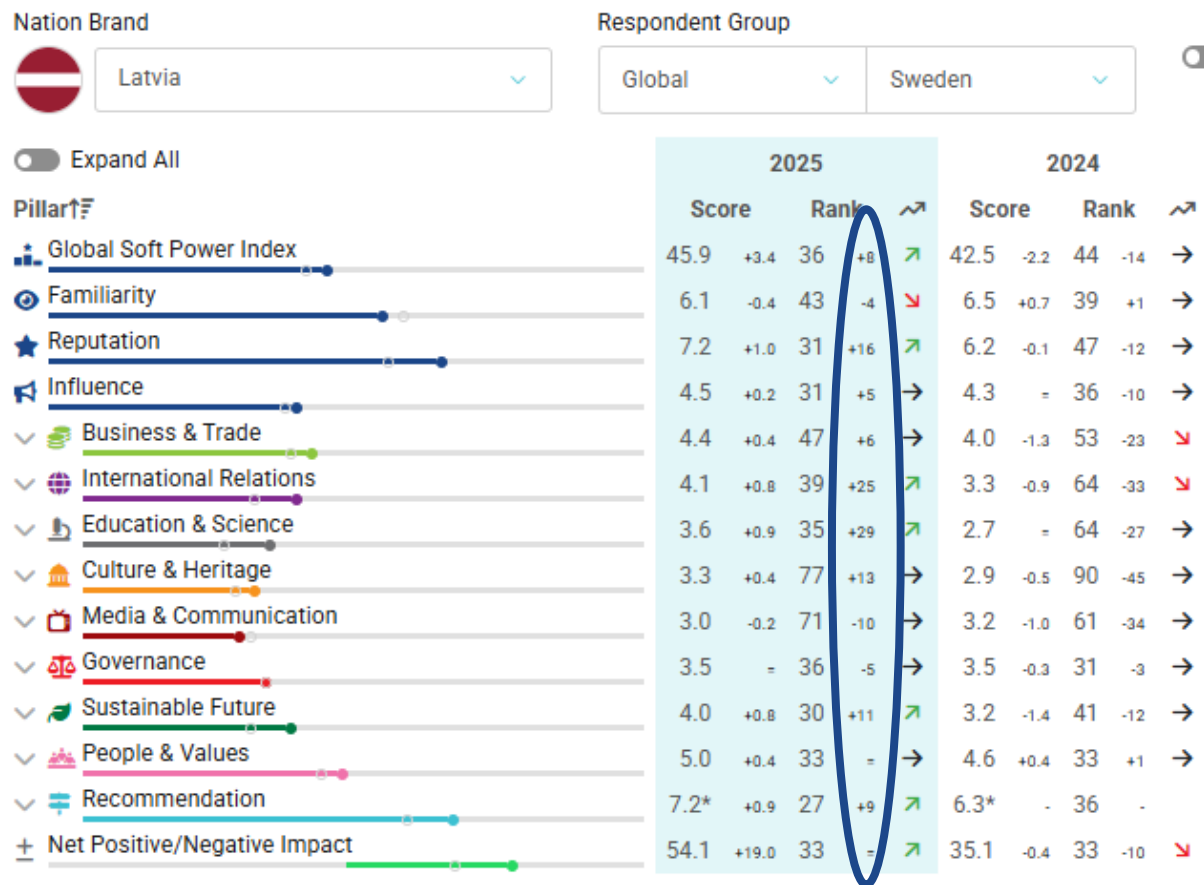
# Among key markets, Latvia's overall Soft Power rank is highest in Finland



- Finland is Latvia's strongest-performing market, with top rankings in sustainability and Governance, reflecting high trust in Latvia's stability, institutions and long-term direction. Finnish respondents also perceive Latvia as a nation with future growth potential that is easy to communicate and do business with, a critical advantage when attracting Nordic investment and deepening economic cooperation.
- Given Finland's economic influence and role as a regional reference point within the Nordics, strengthening this relationship has the potential to lift Latvia's overall international scores while reinforcing positive spillover effects across neighbouring markets.
- Finland's positive perception of Latvia's investment in green energy and technologies further reinforces the opportunity to position Latvia as a regional centre for sustainable innovation and practical green solutions, aligned with Nordic priorities and values.



# Favourable perceptions in Sweden, especially in Sustainable Future and People & Values

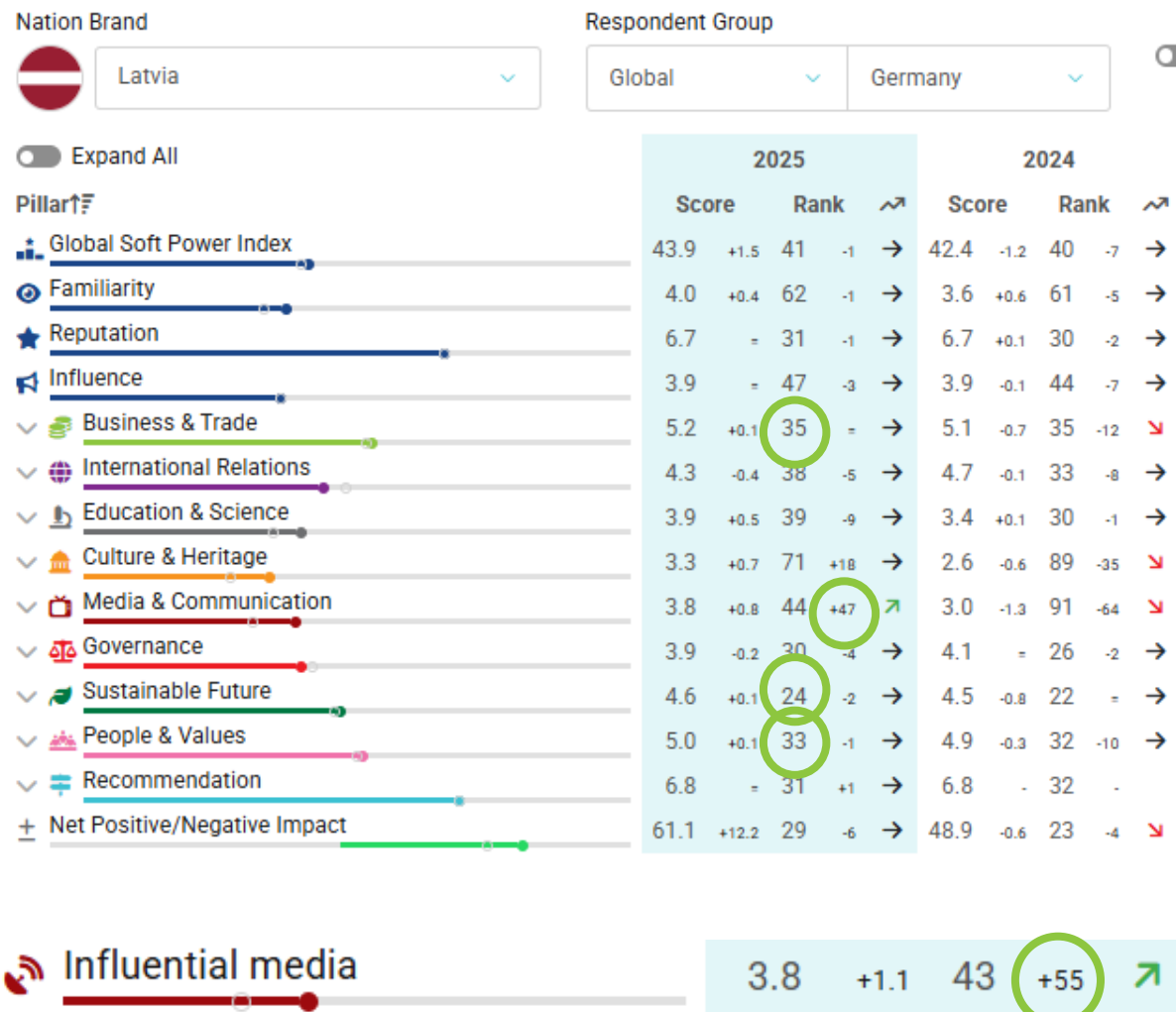


- Latvia ranks second overall in Sweden and scores highest on sustainability and people and values. This creates a clear opportunity to further position Latvia in Sweden as friendly and future-oriented nation, strengthening both investment and visitation recommendations.
- As in Finland, Sweden views Latvia positively for its future growth potential, ease of doing business. Perceptions of rich heritage reflected in a relatively high willingness to recommend Latvian products and services. This alignment across economic, people and sustainability perceptions provides a strong foundation to deepen and strategically leverage the bilateral relationship.
- Notably, Latvia has seen a marked improvement across multiple pillars and attributes in 2025, reversing declines recorded in the previous year and signalling renewed momentum that should be leveraged further.





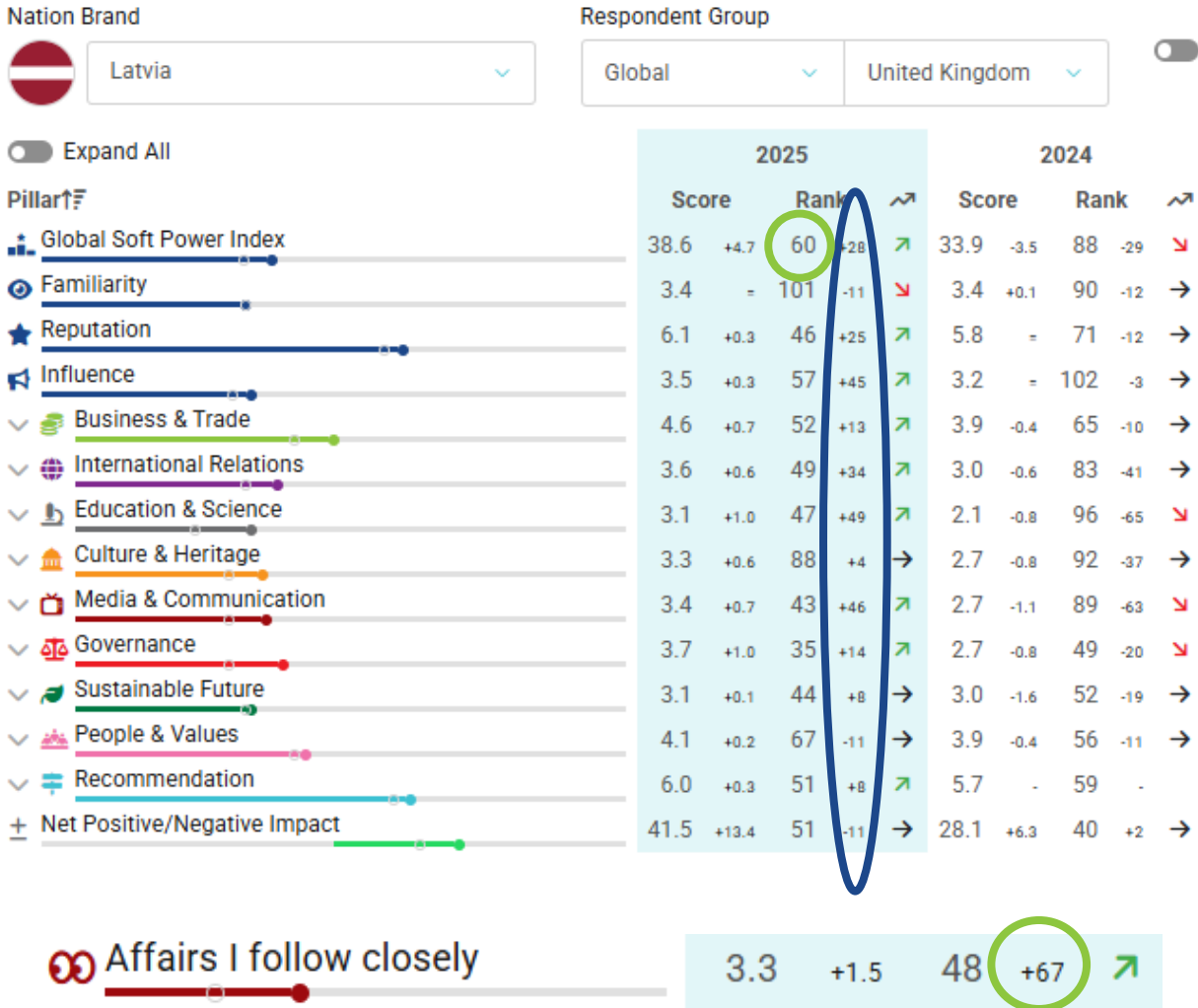
# Strong profile in Sustainable Future, Governance, and Business & Trade among German respondents



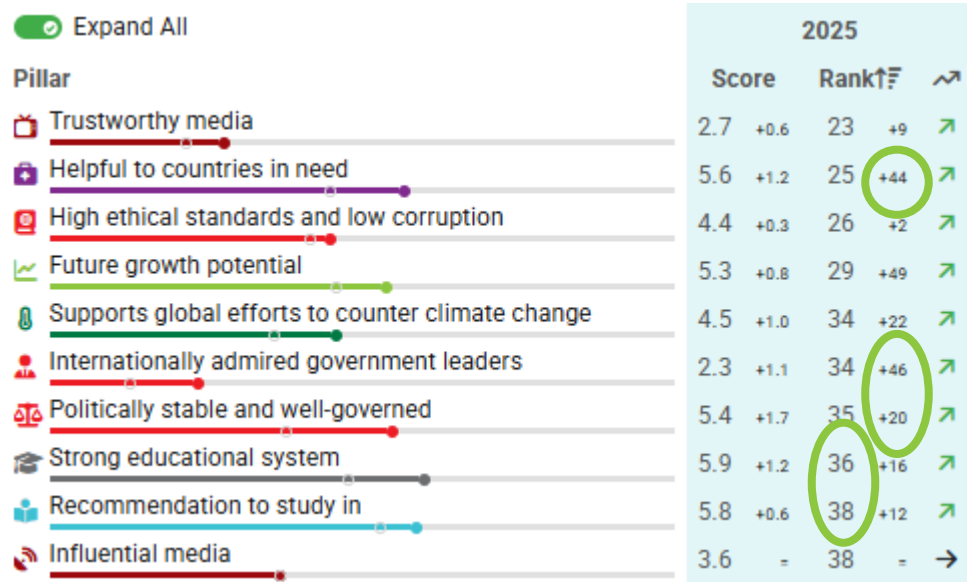
- Business & Trade stands out as one of Latvia's strongest pillars in Germany, after People & Values, with Latvia being viewed as easy to do business with and worthy investment destination. Given Germany's large economy, there is a significant opportunity to help unlock Latvia's untapped potential in areas, where strong foundations already exist e.g., transport infrastructure and industrial development.
- A notable uplift in Media & Communications is driven by growing media influence, likely reflecting Latvia's visible support for Ukraine. This creates scope to further position Latvia as a credible and vocal ally within the EU and NATO, particularly on security and regional stability and further boost its profile on a global stage.



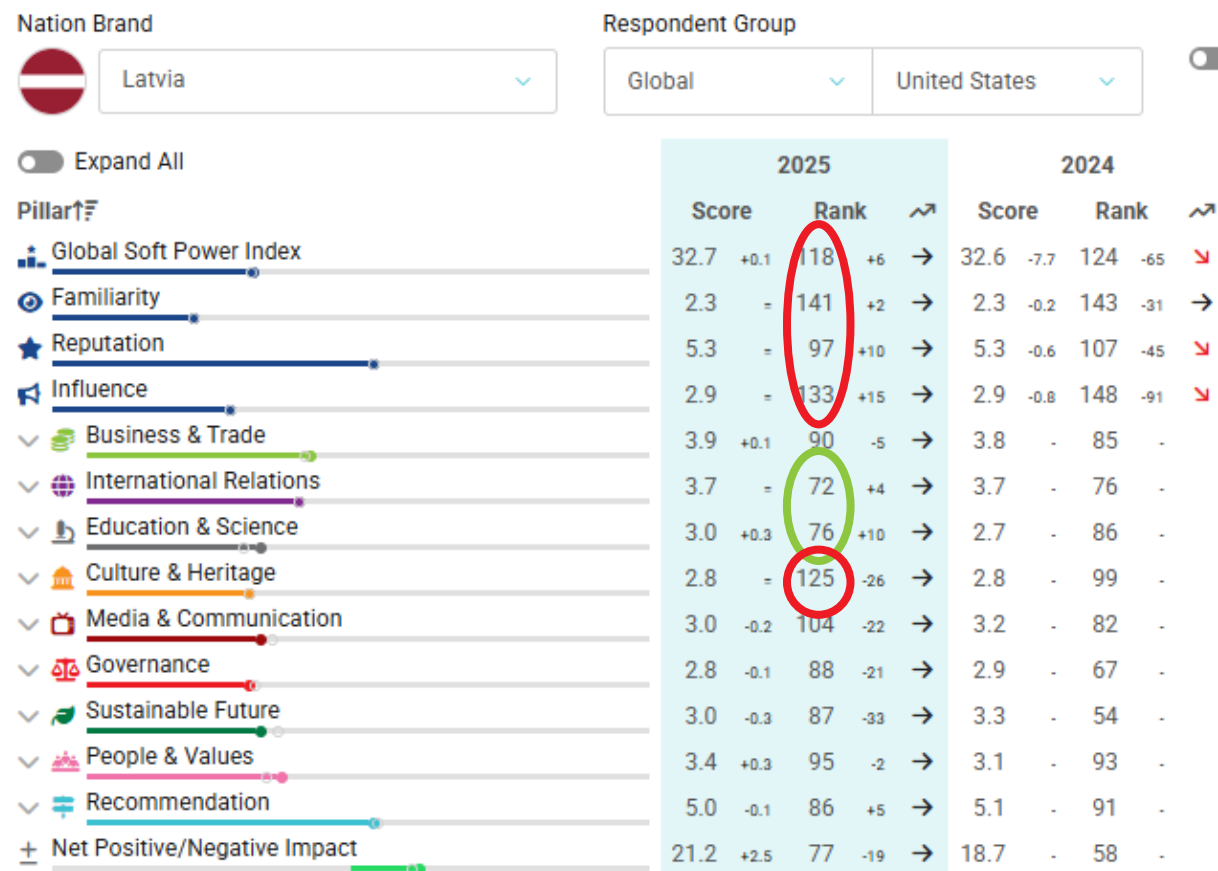
# Latvia has experienced the biggest boost in KPIs, Pillars & Attributes in the UK market



- Despite lower familiarity this year, Latvia has recorded a significant uplift across reputation, influence and multiple pillar- and attribute-level measures, resulting in an impressive rise of 28 places in the GSPI 2025 overall ranking.
- Performance gains have been particularly strong in influence, up 45 positions, and reputation, up 25 positions. At the pillar level, Latvia recorded notable improvements in Media & Communications and International Relations, pointing to growing visibility on the global stage, from a UK perspective.
- The UK also ranks Latvia highly on Education & Science, which translates into strong perception as an attractive place to study. Given the UK's own strong standing in this area, this endorsement adds significant credibility to these strengths and should be actively leveraged to position Latvia as an attractive destination for study, research collaboration and talent attraction.



# Relatively low perceptions in the US, with a slight Improvement in 2025



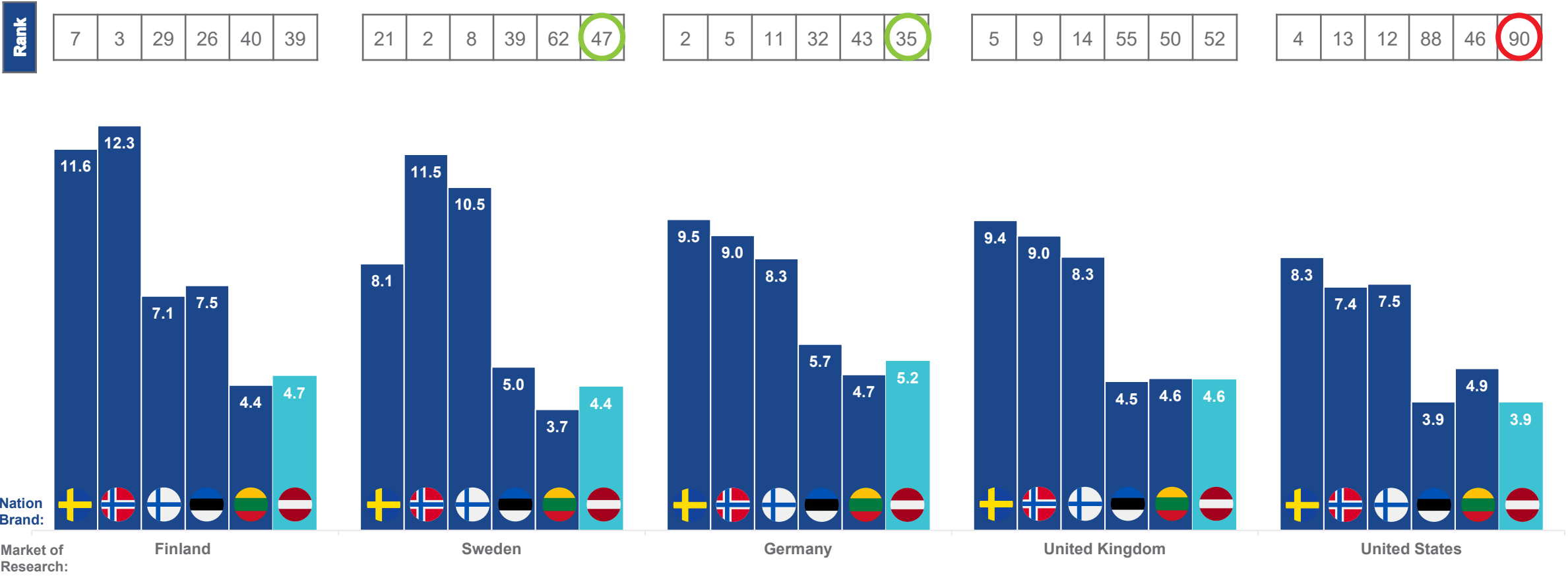
- The US shows the lowest familiarity with Latvia among focus markets, which limits perceptions of reputation, influence and across attributes. Despite year-on-year improvements, Latvia still trails its Baltic peers in absolute terms, pointing to the need for a more deliberate and visible presence in this strategically important market.
- As elsewhere, Culture & Heritage remains Latvia's weakest pillar in the US, reflecting familiarity that is shallow rather than negative. This underscores the need for a nation branding approach that places greater emphasis on Latvia's cultural identity and everyday experiences.
- Latvia falls outside the global top 50 on many attributes in the US, yet performs relatively well on trust, education, green investment and political stability. These shared strengths across markets provide a clear foundation for a more consistent and unified global nation branding narrative.



# Strengthen established Business & Trade positions in Sweden and Germany and address gap in the US



Estonia leads the Baltics in Finland due to closer business ties, while elsewhere the Baltics are more closely aligned. Latvia outperforms Lithuania in Sweden and Germany, an advantage worth further strengthening. The US remains the main exception, where Latvia trails Lithuania, reflecting Lithuania's closer bilateral ties

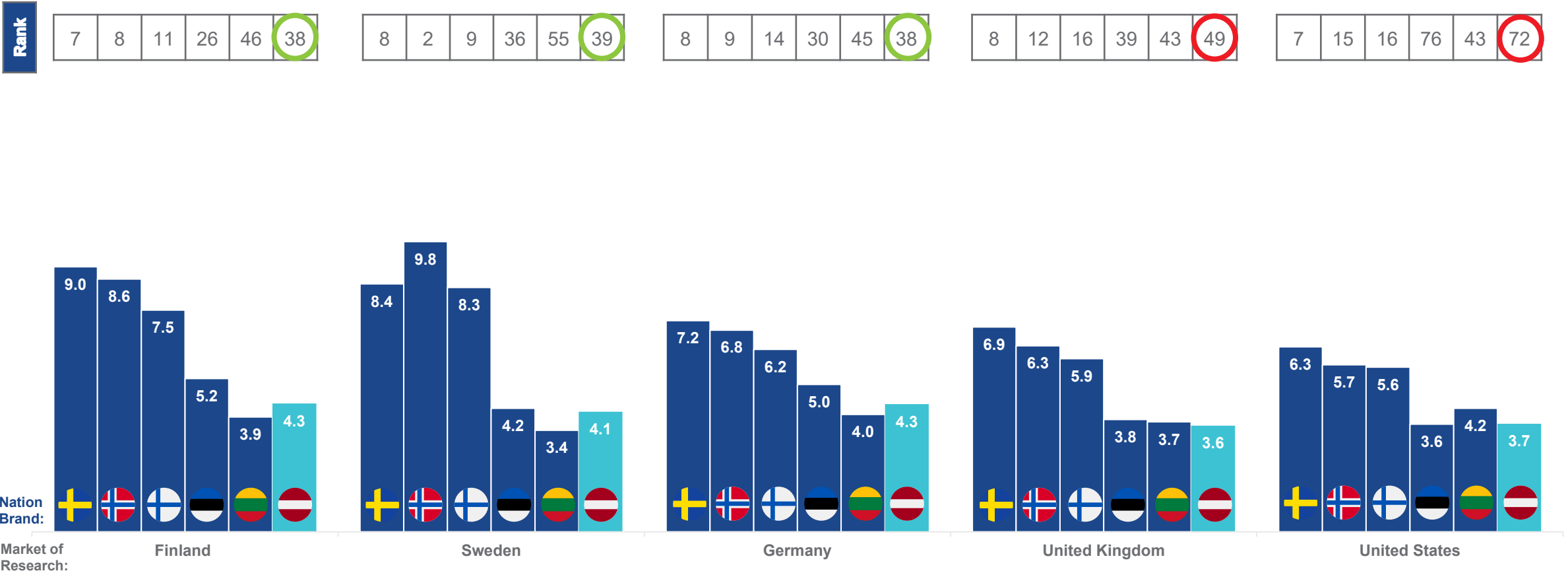




# Build on European strengths and prioritise international relations in the UK and US



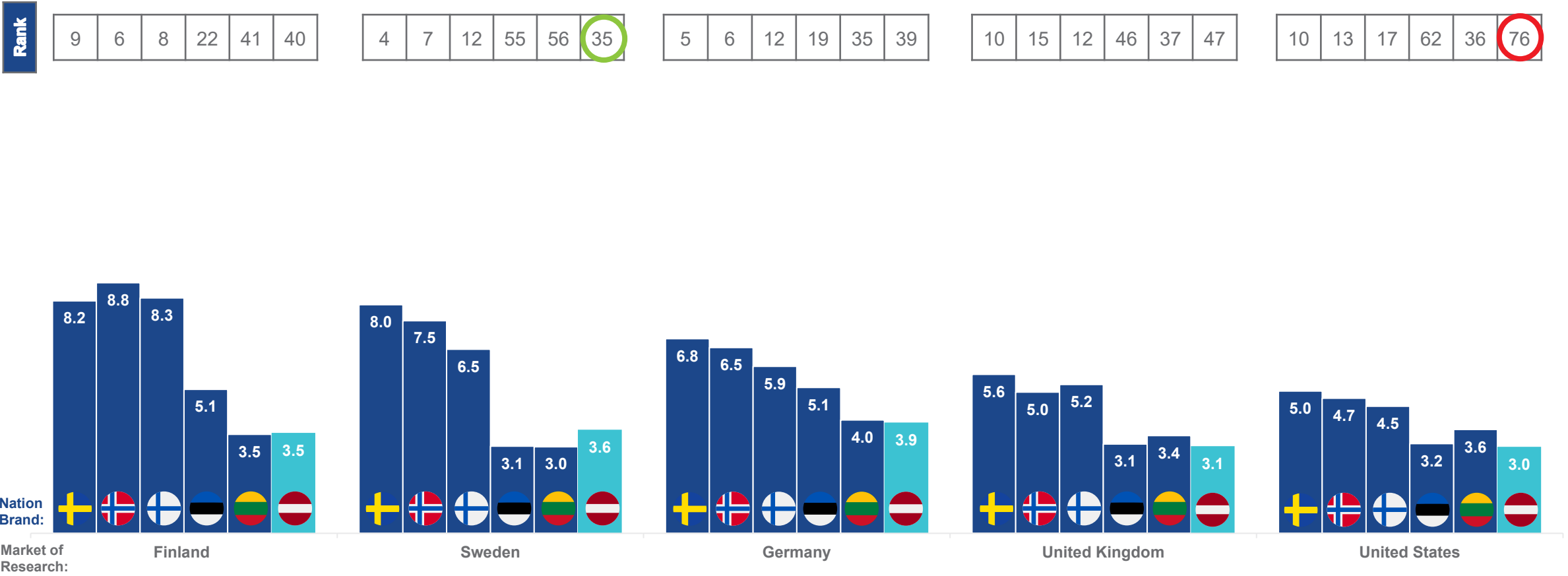
Latvia outperforms Lithuania on International Relations in Finland, Sweden and Germany, but trails Estonia, indicating scope to further elevate its standing. The UK and the US present the greatest opportunity, where Latvia's rankings are currently weakest



# Perceptions of Education & Science vary by market, highlighting the need for tailored market strategies



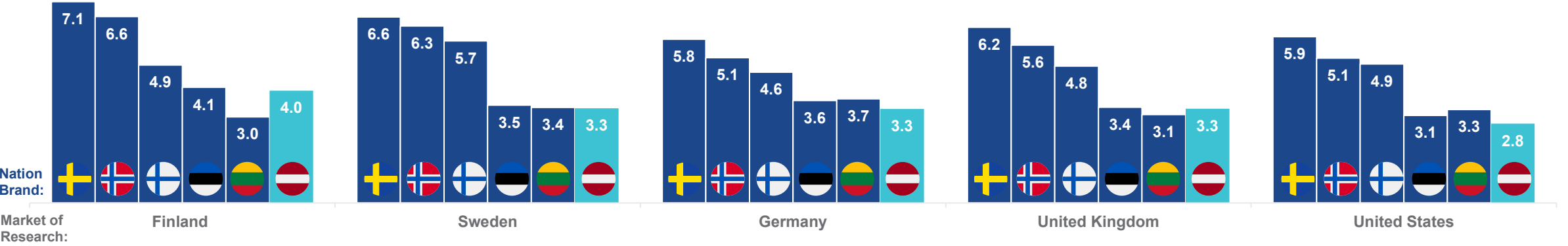
Estonia leads in Finland and Germany, and Lithuania in the UK and the US, while Latvia leads its Baltic peers in Sweden. This suggests an opportunity for Latvia to use Sweden as a reference market to strengthen and export its Education & Science credentials more consistently across other key markets



# Unlocking Culture & Heritage is key to strengthening Latvia's international profile



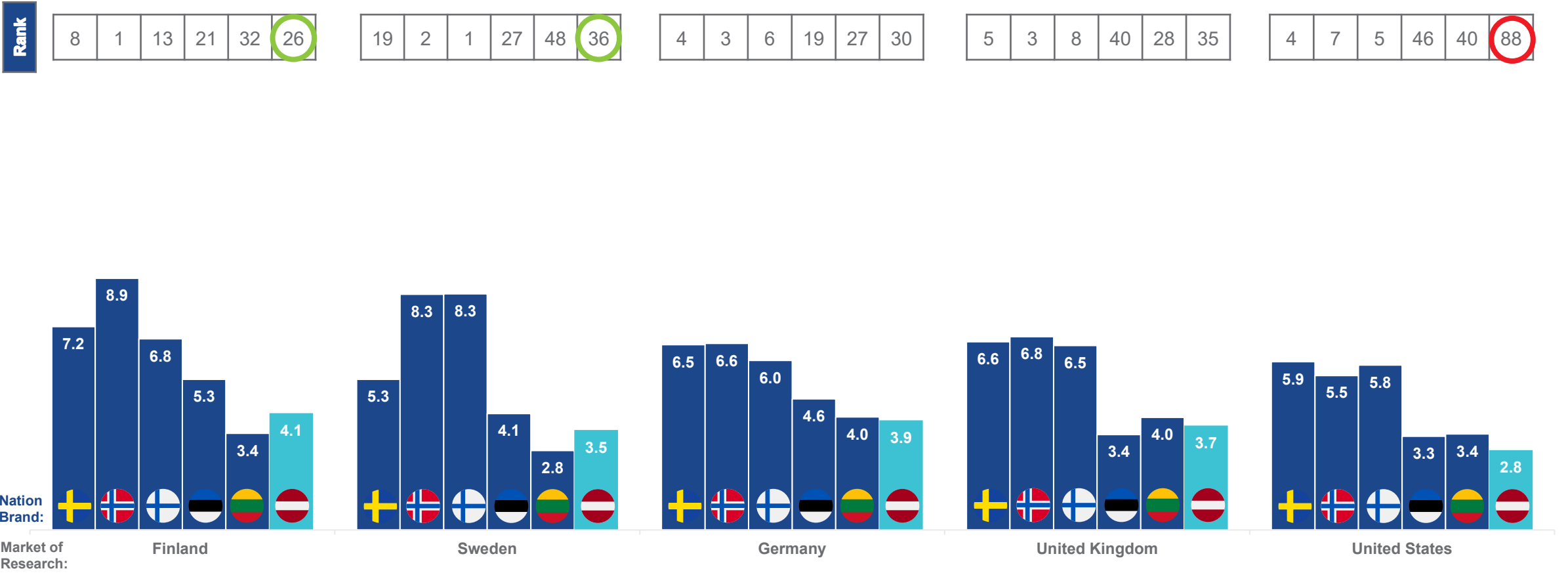
Perceptions are weakest in the UK and the US, with Latvia also trailing its Baltic peers in Germany, despite stronger performance elsewhere. In the US, Latvia falls outside the global top 100, while Finland remains the strongest reference point. This highlights the need for more visible, market-specific cultural push using everyday touchpoints such as food, products, and tourism to deepen familiarity, especially where distance is greatest



# Governance perceptions are strong in Europe but weaken sharply in the US



Latvia performs strongly on Governance in Finland and Sweden, ahead of Lithuania but behind Estonia, is broadly in line with peers in Germany and the UK. In the US, however, it trails both Baltic peers, underlining a clear opportunity to bring Governance perceptions at least in line with regional comparators

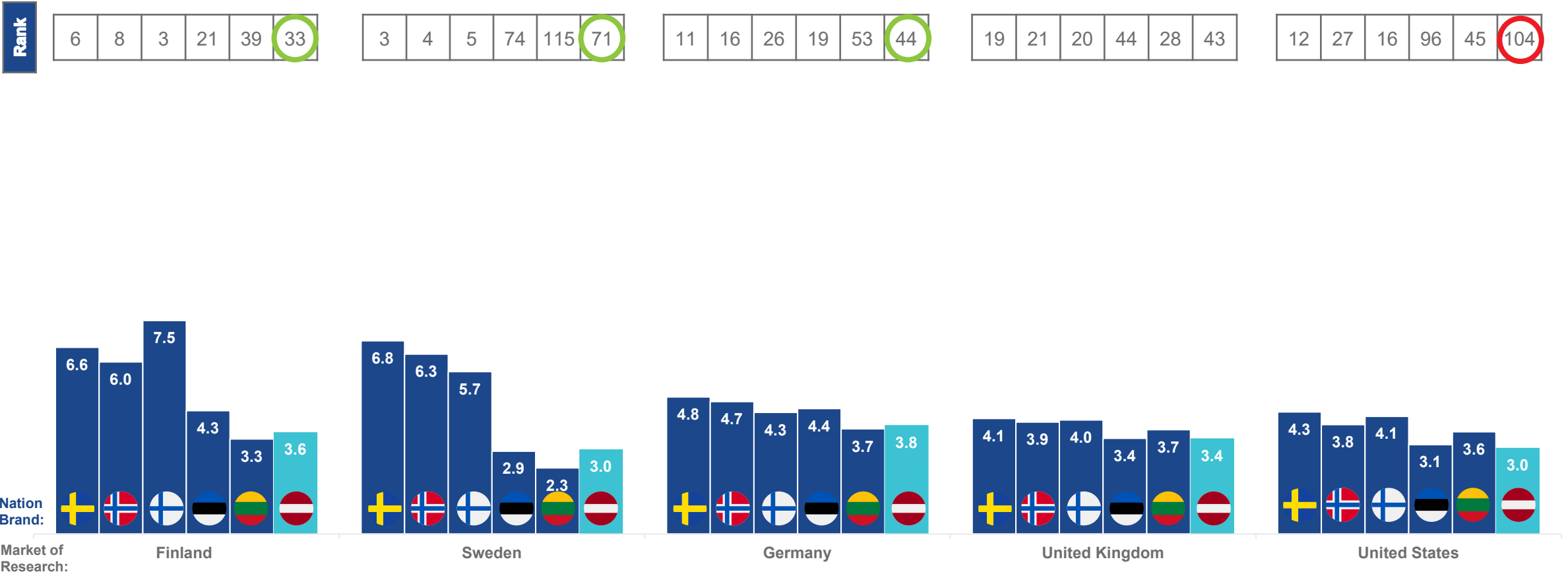




# Media & Communications perform strongest in familiar and strategically aligned markets



Perceptions are strongest in Finland and Germany and remain relatively solid in the UK, but are weaker in Sweden and drop sharply in the US. This suggests that recent gains in visibility are resonating in closer and strategically aligned markets, while more targeted and sustained communication is needed to build influence in the US and address underperformance in Sweden

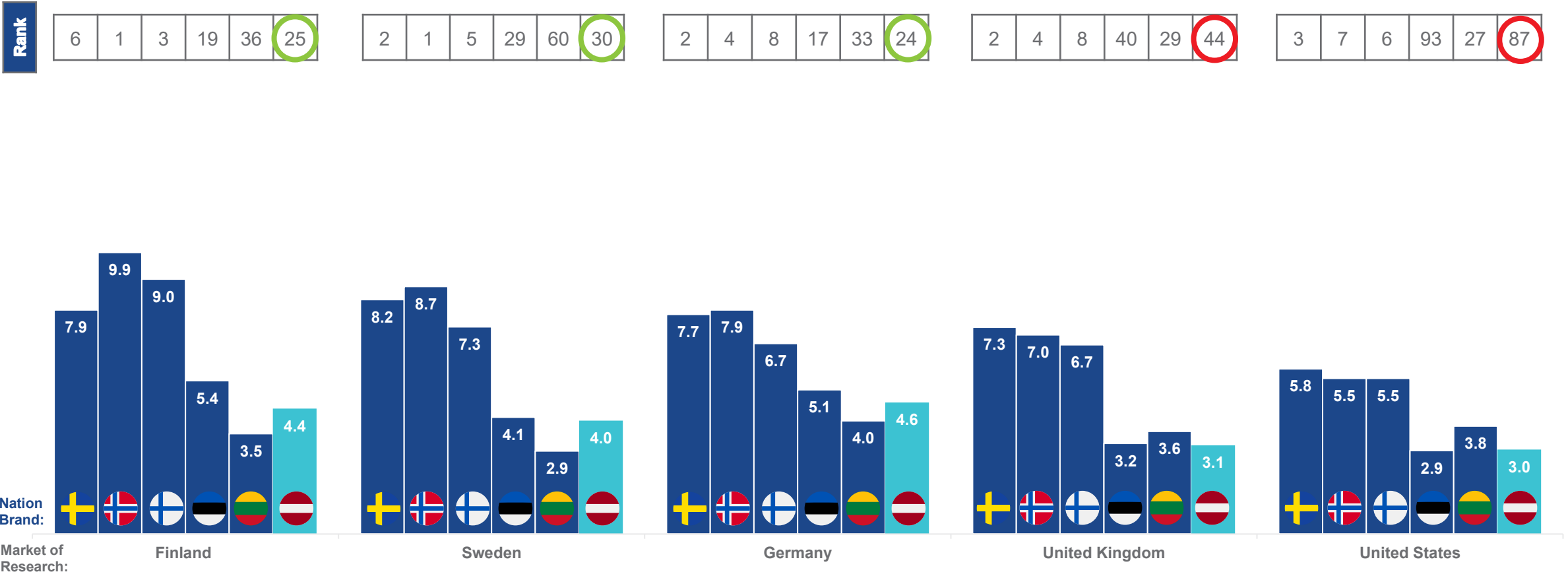


# Sustainability offers scope to close gaps in Europe and reset perceptions in global markets



Sustainable Future

Latvia can close the gap with, and potentially overtake, Estonia on sustainability in Sweden and Germany, while strengthening its position in Finland. The UK and the US offer the greatest upside, where perceptions lag and Lithuania leads, highlighting misaligned perceptions and the need for clearer signalling of Latvia’s sustainability credentials beyond the EU

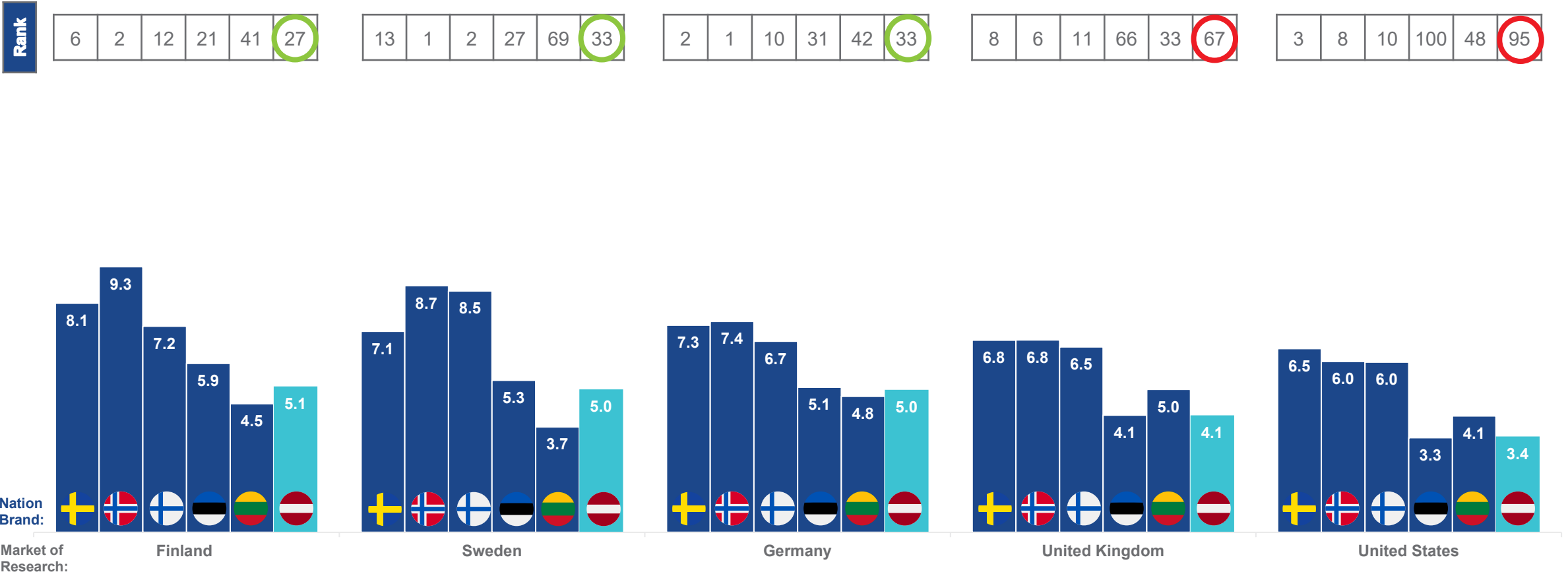


# People & Values are strong in Finland, Sweden and Germany, but drop sharply in the UK and US



Latvia performs relatively well in Finland, Sweden and Germany, where it remains ahead of Lithuania and is particularly competitive in Sweden and Germany. Perceptions weaken in the UK and decline further in the US, where Latvia falls marginally behind Estonia and more noticeably behind Lithuania.

This pattern points less to negative sentiment than to relatively shallow familiarity in these markets



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# Latvia's Attractiveness Potential



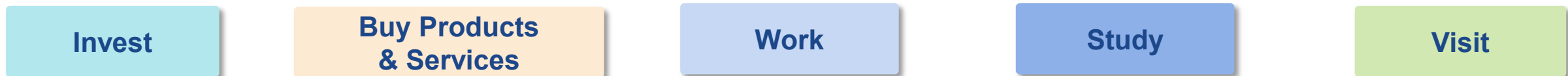


# Recommendation Measurement

Our survey questions measure willingness of respondents to recommend countries as places to invest in, buy products and services from, work and study in, as well as visit



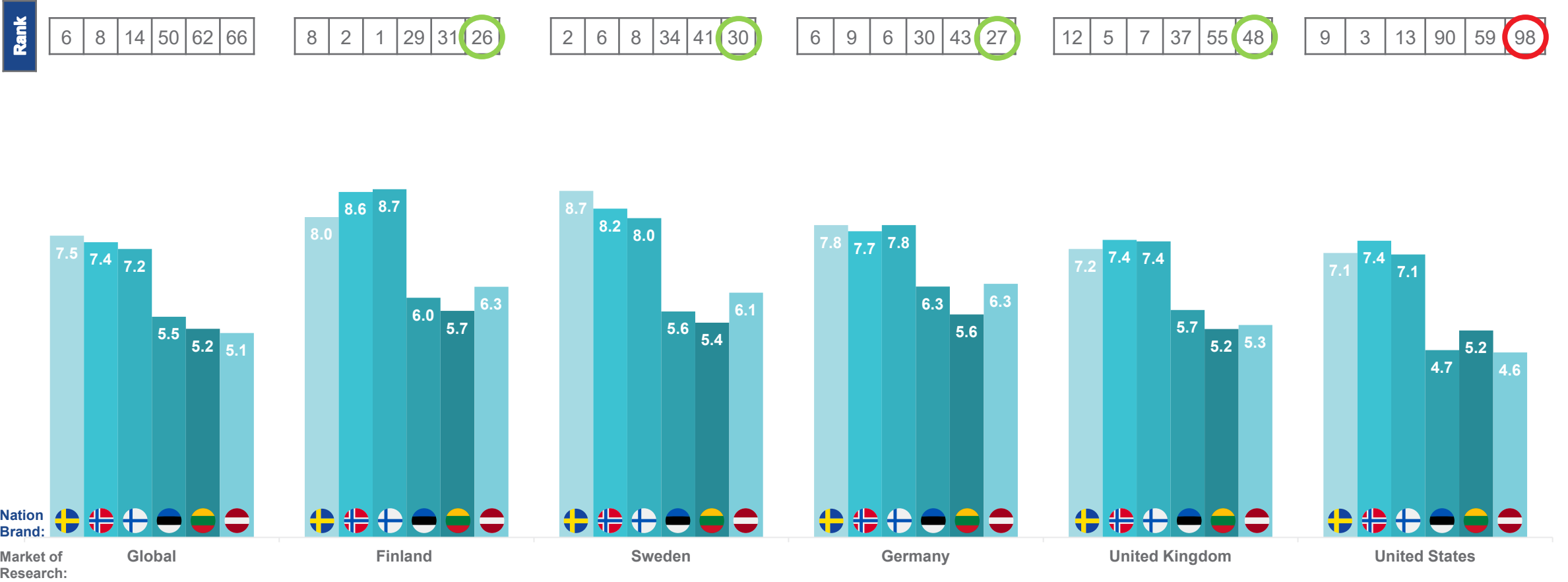
Would you recommend this country as a place to...



- ✓ Understanding to what extent respondents are willing to recommend investing in, buying products and services from, working and studying in, as well as visiting your country is an efficient way to **evaluate your nation brand's potential** across the key areas of investment, trade, talent, and tourism
- ✓ In addition, our drivers analysis will enable you to **identify nation brand attributes that are key in developing that potential** and how that differs between your target regions and markets worldwide

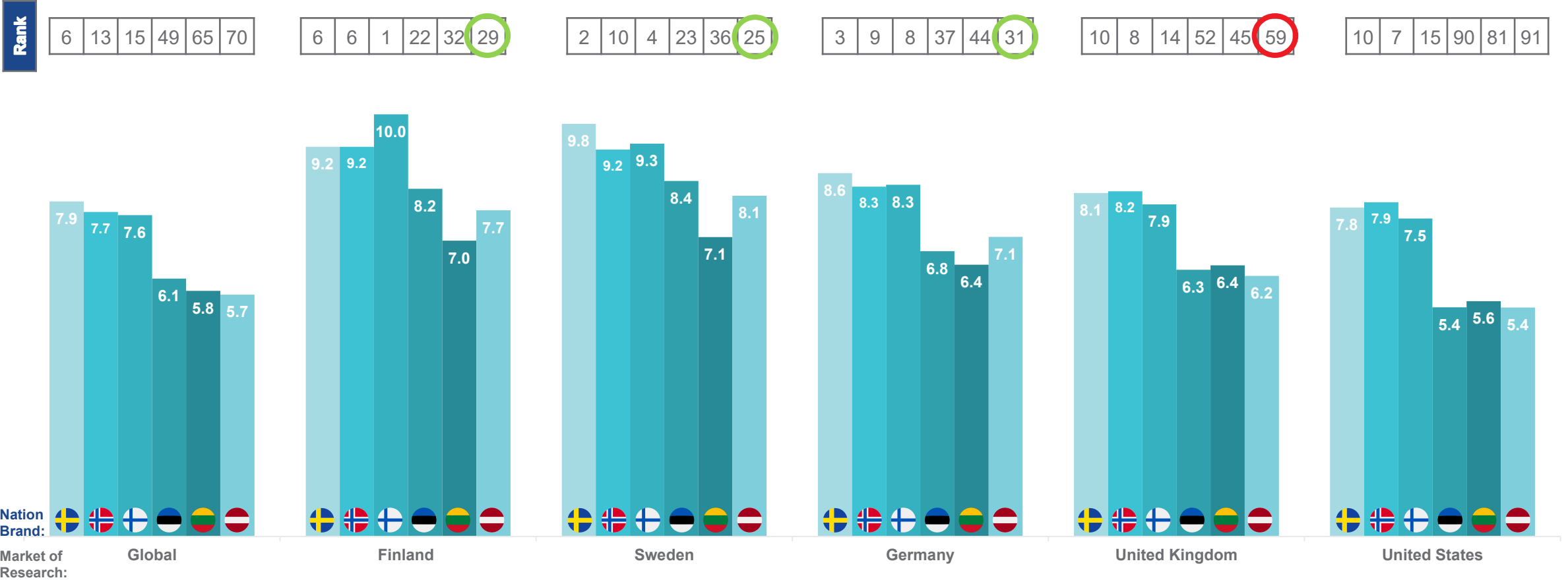
# Recommendation to Invest in

While Latvia trails its Baltic peers slightly at the global level, its investment appeal is stronger in the Nordics and Germany, and second only to Estonia in the UK. By contrast, Latvia underperforms in the US, highlighting the need to build greater visibility beyond neighbouring and closely connected markets



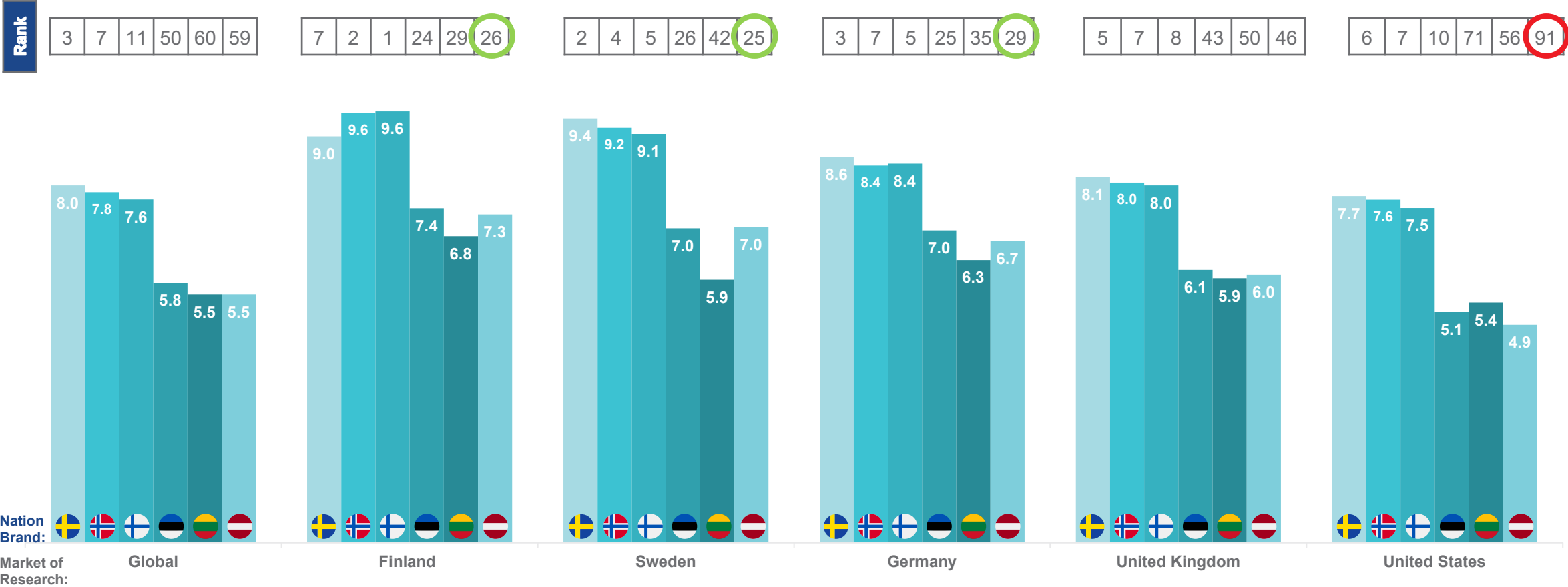
# Recommendation to Buy Products and Services from

A similar pattern emerges for product and service recommendation, with Latvia strongest in the Nordics and Germany but weaker in the UK and the US, reinforcing the need for more active promotion of national products and service capabilities where Latvia holds and edge such as sustainability and green innovations



# Recommendation to Work in

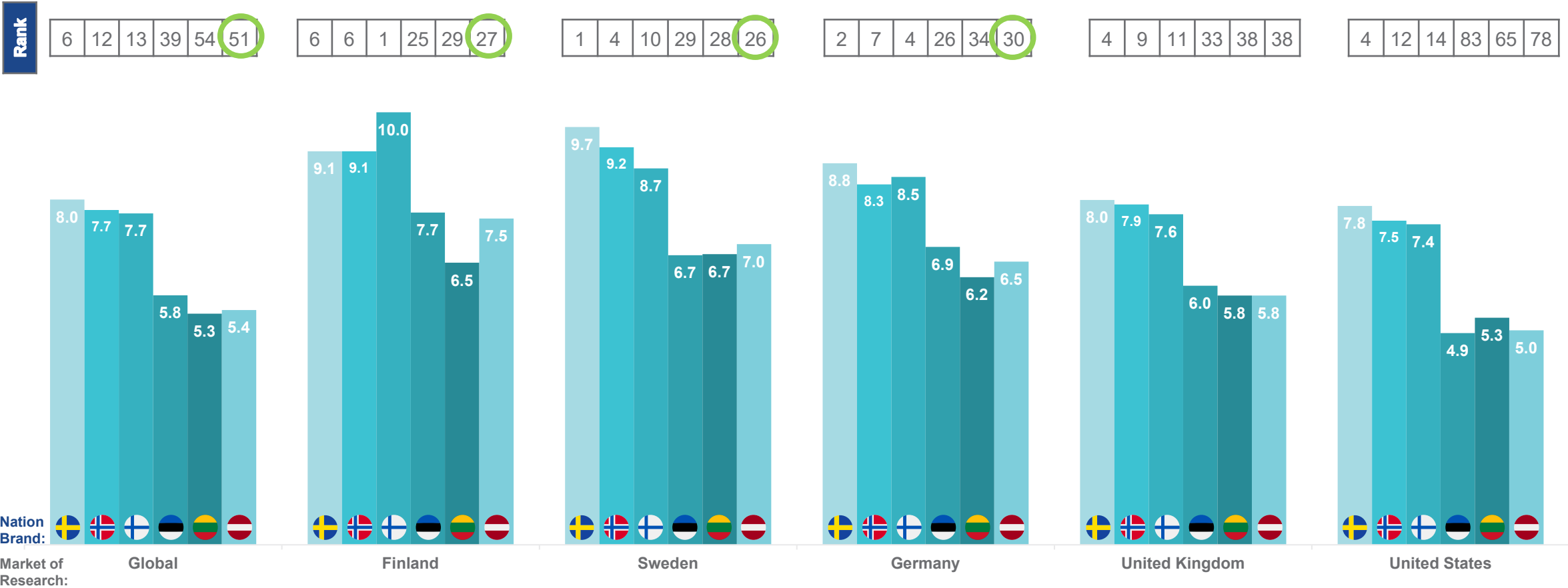
Aside from the US, Latvia outperforms Lithuania and competes closely with Estonia on recommendation as a place to work – reflecting perceptions of political stability and relative ease of doing business. Professional opportunities and priority sectors communications and could further enhance Latvia’s appeal to international talent





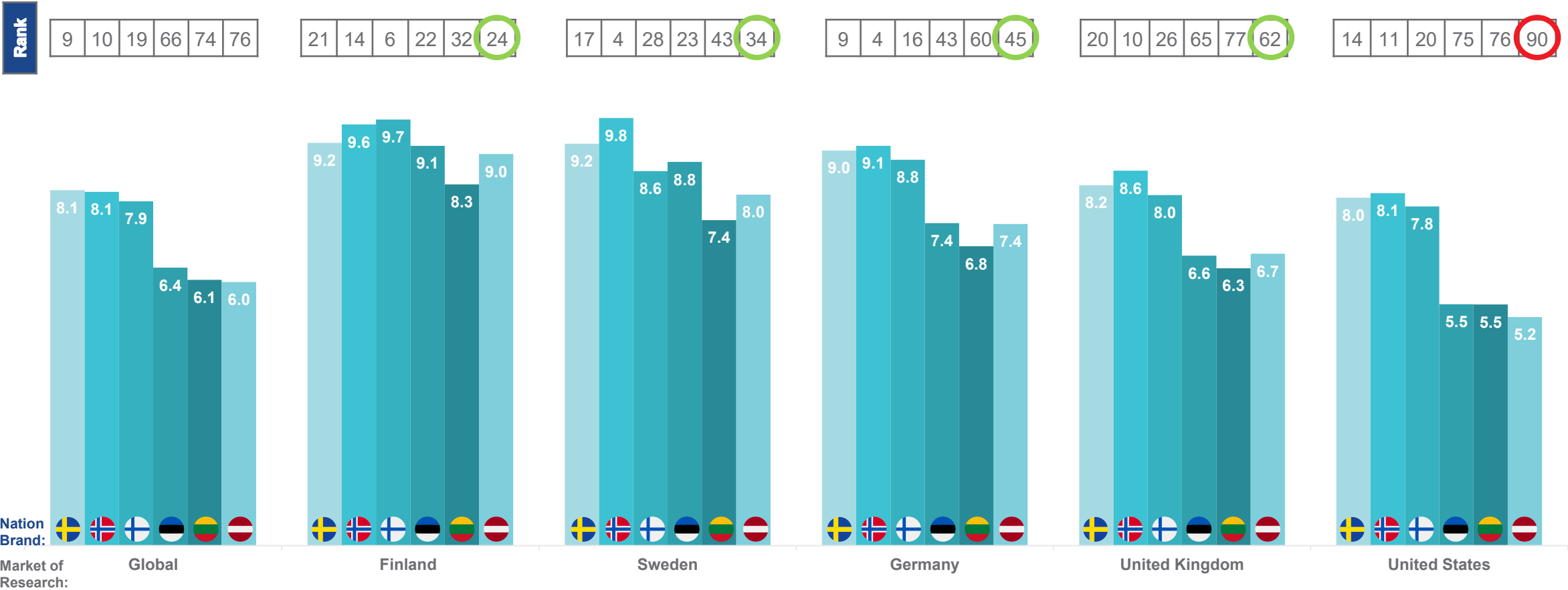
# Recommendation to Study in

Relatively strong perceptions of Latvia's education system are reflected in its scores, with Latvia ranking just behind Estonia in Finland, where familiarity is significantly higher, and leading in Sweden. Encouragingly, Latvia is only marginally behind Estonia in the UK and ranks second in the US, reinforcing its relative strength



# Recommendation to Visit

Latvia's strongest scores are in recommendation to visit, signalling broad goodwill in tourism compared with other sectors. In several markets, 7–9 in 10 respondents say they would recommend Latvia, even as competitive preferences lie with the Nordic destinations, and especially so in more distant markets such as the UK and the US



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# Importance of Tourism to Nation Brands and Economic Growth



# Tourism is not only about travel – it is a nation's first handshake with the world



Visitation of a place  
leads to increased  
**Familiarity**



Greater Familiarity  
driven by tourism  
leads to an improved  
**Reputation**



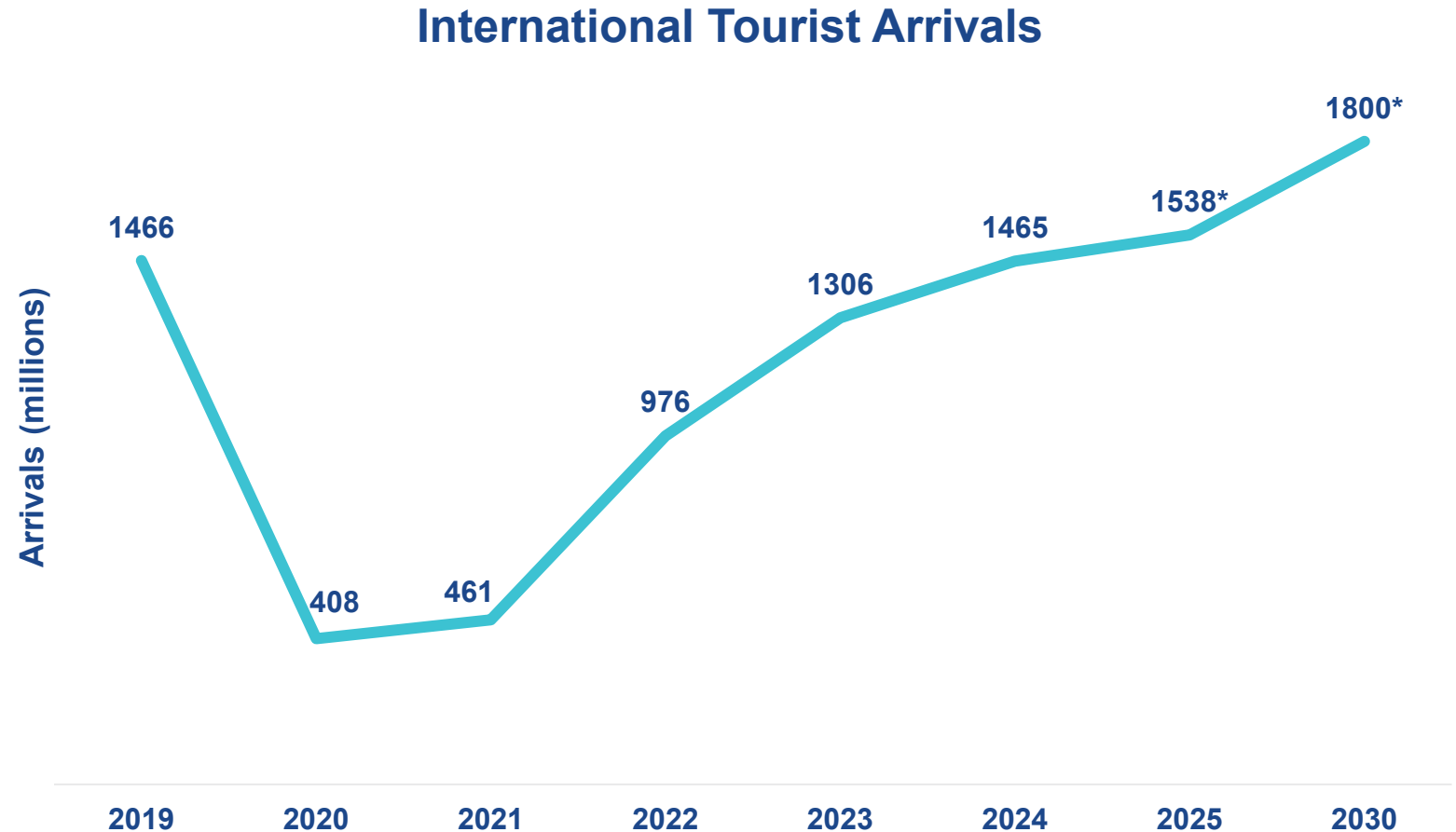
The better Reputation,  
people are more likely  
to recommend a place  
for **investment**, **work**,  
**study** and **trade**



# Tourism's global rise post-pandemic stats

International Tourist arrivals are set to surpass pre-pandemic level this year, according to UN Tourism's, which reported a 5% increase in arrivals in H1 2025 compared to 2024

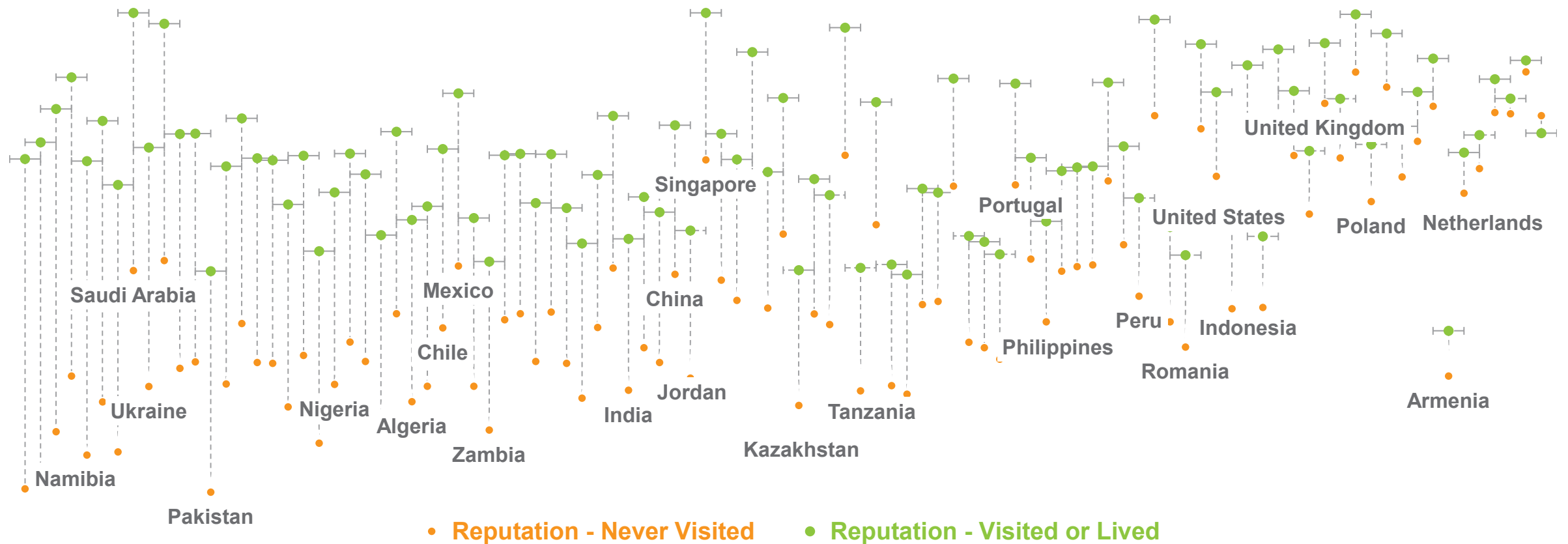
- 1.5 billion international arrivals in 2024, up from 4% from 2019 (UN Tourism)
- \$2 trillion in export revenues from tourism in 2024 (UN Tourism)
- \$10.9 trillion contribution to global GDP in 2024 (WTTC)
- 357 million jobs supported by the sector in 2024 (WTTC)



# Reputation increases once place is visited

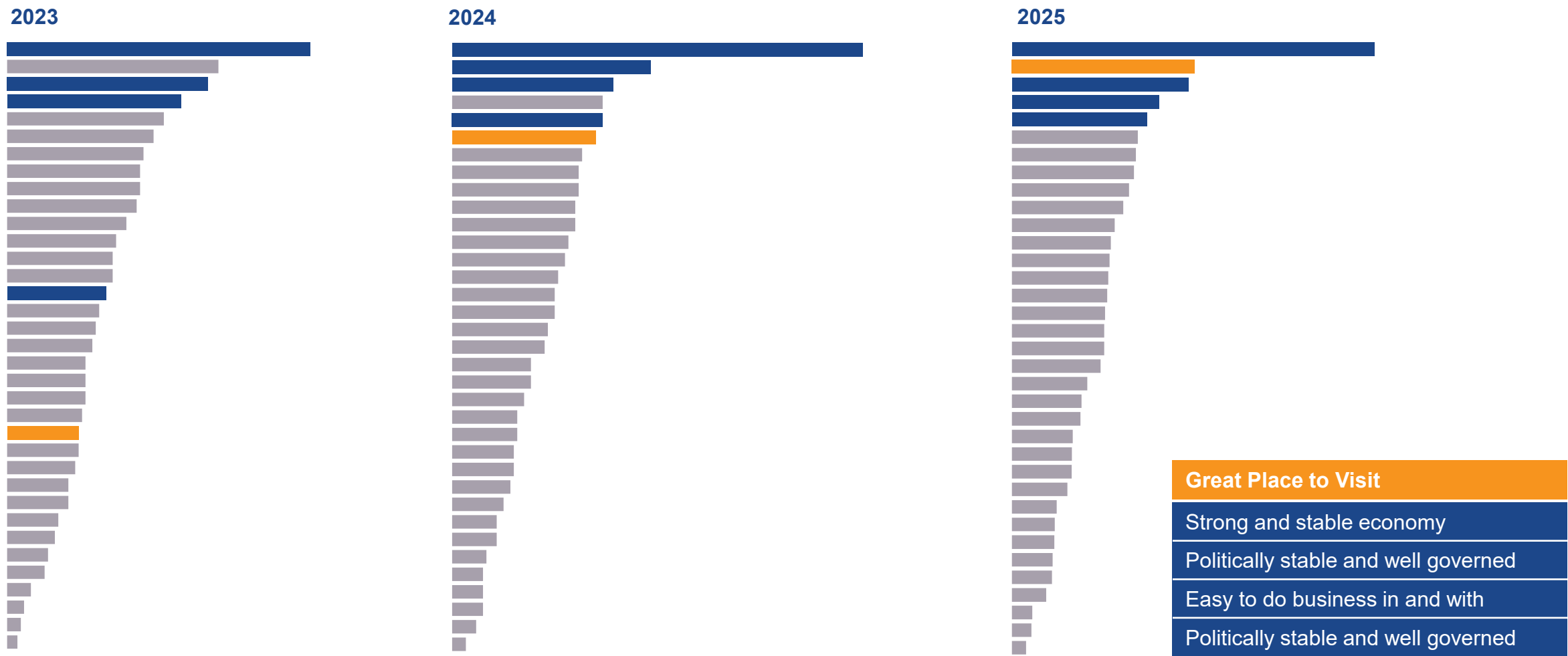
This chart shows that, on average, a nation's reputation increases by 1.1 points among those who have visited it. For Latvia, this highlights the value of driving visitation, where it already performs relatively well, and using culture, heritage and food to turn visits into deeper familiarity and reputational gains

Reputation perception difference between those who have and have not visited a country



# Importance of perception of great place to visit over time

Great place to visit rose from the 24th to the 2nd most important driver of reputation in just two years, underlining the growing power of travel and experience in shaping place brands



# Top 10 Drivers across KPIs and Sectors

Great place to visit' is now a top driver of reputation, influencing investment, talent, and tourism. Its rise shows that tourism isn't just leisure - it's central to national brand and economic output

Business & Trade Governance Sustainable Future Culture & Heritage Education & Science International Relations People & Values Media & Communications

	Reputation	Influence	Invest	Products & Services	Work	Study	Visit
1	Strong & stable economy	Strong & stable economy	Strong & stable economy	Strong & stable economy	Strong & stable economy	Strong & stable economy	<b>Great place to visit</b>
2	<b>Great place to visit</b>	Influential in diplomatic circles	Advanced in tech & innovation	<b>Great place to visit</b>	<b>Great place to visit</b>	Strong educational system	Strong & stable economy
3	Politically stable and well governed	Products & brands the world loves	Politically stable and well governed	Products & brands the world loves	Politically stable and well governed	Advanced in tech & innovation	Appealing lifestyle
4	Easy to do business in and with	Affairs I follow closely	Easy to do business in and with	Easy to do business in and with	Strong educational system	Products & brands the world loves	Friendly
5	Products & brands the world loves	Advanced in tech & innovation	Products & brands the world loves	Advanced in tech & innovation	Products & brands the world loves	Advanced in science	Good relations with other countries
6	Trustworthy	Easy to do business in and with	Strong educational system	Strong educational system	Easy to do business in and with	Politically stable and well governed	Influential arts & entertainment
7	Internationally admired government leaders	Influential arts & entertainment	Helpful to countries in need	Politically stable and well governed	Advanced in tech & innovation	<b>Great place to visit</b>	Politically stable and well governed
8	Good relations with other countries	Helpful to countries in need	<b>Great place to visit</b>	Influential arts & entertainment	Appealing lifestyle	Helpful to countries in need	Food the world loves
9	Strong educational system	Influential media	Invests in green energy & technologies	Appealing lifestyle	Sustainable cities & transport	Influential arts & entertainment	Products & brands the world loves
10	Helpful to countries in need	Internationally admired government leaders	Sustainable cities & transport	Sustainable cities & transport	Helpful to countries in need	Sustainable cities & transport	Easy to do business in and with



# Tourism and Recommendation to invest correlation

There is a strong correlation between being perceived as a great place to visit and attracting investment, showing that tourism appeal also acts as a gateway to broader economic confidence and opportunity



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# Recommendations for Latvia





# Recommendations

## 1. Convert strong regional visibility into broader international awareness and relevance

**Low familiarity remains Latvia's most significant constraint** on soft power performance. Ranked 129th, it continues to limit outcomes across reputation, influence and a wide range of attributes:

- While Latvia's visible support for Ukraine initially boosted awareness, this uplift has been weaker and less enduring than in Estonia or Lithuania and is now gradually fading. As public attention diffuses and conflict fatigue sets in, the early "halo effect" enjoyed by nations at the forefront of support has diminished. Estonia and Lithuania, which saw larger initial gains, have experienced sharper subsequent declines, while Latvia's position has eased more gradually, underscoring that **geopolitical visibility alone cannot sustain long-term familiarity**.
- Familiarity remains strongest in neighbouring and politically aligned markets, particularly the Nordics, Central and Eastern Europe, Caucasus and Central Asia. Even here, Latvia is often outperformed by peers, and higher awareness does not consistently translate into stronger reputation or influence. This highlights the need to **move beyond historical or episodic visibility and invest in building both mental and physical availability, anchored in a clear, consistent and recognisable nation brand**.
- Beyond Europe, familiarity drops sharply. **Latvia remains largely off the radar in major non-European power markets**, including the US, China, India, G20, and key Middle Eastern economies, despite its EU membership and alignment with Western values. These markets play an outsized role in shaping global perceptions and supporting long-term economic and political ambitions, with the US a particularly important focus given its global agenda-setting influence.
- From a prioritisation perspective, **Latvia should continue to deepen visibility within Europe**, while **simultaneously investing in sustained, coherent engagement in selected major non-European power markets**. In these markets, familiarity-building should be theme-led, centred on Latvia's core strengths as a stable and well-governed economy with strong science and education, open for business, and offering clear opportunities in areas such as green technology and innovation.

A balanced mix of political signalling and cultural and economic storytelling, anchored in a clear and **coherent nation brand strategy**, will be essential to **translating short-term visibility into lasting relevance and recognition**.



# Recommendations

## 2. Turn under- promoted cultural assets into distinctive, recognisable touchpoints that deepen familiarity

**Culture & Heritage is Latvia's weakest soft power pillar** (95th), despite strong underlying assets. Baltic peers rank higher, with Estonia at 78th and Lithuania at 89th, despite similar historical and cultural foundations. This gap highlights a **clear opportunity for Latvia to match or exceed peer performance through more effective communication of its cultural assets**. The challenge is under-promotion rather than substance, pointing to the need for clearer, more recognisable cultural associations built around Latvia's culture, cuisine, brands, people and traditions:

- Many Latvian products combine long heritage, distinctive character, and existing regional recognition, providing strong foundations for international storytelling. With the right exposure and channels, these everyday **cultural touchpoints could scale internationally and build familiarity more effectively than abstract narratives**.
- Perceptions of Latvian cuisine remain very low (140th), despite quality comparable to regional peers and the Nordics. The challenge is awareness, not product quality. Lithuania's success in popularising šaltibarščiai ("pink soup") through **festivals and social media shows how a single, clearly owned dish can create a broader cultural halo**. Estonia's higher ranking further underlines the headroom for Latvia to grow. Latvia could adopt a similar approach around distinctive food and drink, while also extending this logic beyond cuisine to products such as amber jewellery, kvass, or biezpiena sierīņš.
- Sport remains underleveraged (115th), despite its ability to generate attention, emotional engagement and media exposure. **Latvia's strengths in ice hockey and basketball offer clear platforms for storytelling**, while distinctive traditions such as Midsummer log jumping, winter swimming (roņi), and mass choir competitions provide authentic, media-friendly content aligned with Latvia's nature-led and eco-conscious positioning.
- Nature-led promotion alone is no longer distinctive, as Baltic and Nordic countries promote similar landscapes and values. Latvia therefore **needs to differentiate more clearly through culture-led storytelling**.

Culture adds depth to Latvia's international profile, accelerates familiarity and builds emotional connection. It is also relatively low-cost, quick to activate and particularly effective for smaller nations with limited media power, making it a critical lever for strengthening Latvia's long-term soft power.





# Recommendations

## 3. Activate everyday voices at home and abroad to build familiarity and promote nation through people, stories and lived experience

**People & Values is Latvia's 2<sup>nd</sup> weakest soft power pillar**, with Latvia ranking 84th, behind Estonia (56th) and Lithuania (72nd). This largely reflects low familiarity with Latvia's people and values, combined with limited and inconsistent international storytelling. While Latvia possesses many positive human and cultural attributes, these are potentially **not yet communicated clearly or frequently enough abroad**.

To strengthen this pillar, Latvia should focus on people-centred storytelling that builds emotional connection and recognisable associations around values, sport and everyday life:

### ➤ **Reposition Latvia's people and values:**

Latvia should aim to increase familiarity with its people as helpful in times of need, trustworthy, generous and fun. Cultural events, everyday stories and human-centred content, amplified through social media and international channels, can help **showcase Latvia at its best and counter any lingering stereotypes** of Latvians.

### ➤ **Leverage sport as an emotional connector:**

Sport remains an underused strength, particularly ice hockey and basketball. **Beyond international visibility, sport drives national pride, emotional engagement and memorability**. These platforms can be leveraged more deliberately to present Latvians as passionate, energetic and welcoming, reinforcing positive people-led perceptions.

### ➤ **Lead with authenticity in media**

Latvia should feature its people more prominently in international media, allowing them to speak in their own voices. **Real stories, faces and lived experiences are essential to making Latvia relatable and strengthening authenticity** within the nation brand. Alongside ordinary Latvians, diplomats and political leaders also have a role to play in giving a face to the nation.

This can help increase Familiarity with Latvia among global audiences, ensure the country's narrative is communicated more clearly, and strengthen Influence and Reputation within political and policy circles, supporting Latvia's ability to attract partners, shape international agendas, and build trust.

### ➤ **Activate the diaspora as ambassadors:**

Latvia's international **diaspora represents a powerful and scalable channel for building familiarity and promoting nation's values**. By actively engaging and empowering diaspora communities through cultural and sports-led events, Latvia can strengthen emotional ties with Latvians abroad while extending awareness to their wider networks of friends, colleagues and families.





# Recommendations

## 4. Build on Latvia's strengths in business, education, and science to enhance reputation, influence and investment appeal as an open, business- friendly Baltic hub

Given the importance of Business & Trade as a driver of both reputation and influence, and relatively strong performance in this area, Latvia should **prioritise further strengthening economic perceptions by leveraging its solid physical and economic foundations**, including ports, transport infrastructure and legacy industries. Particular emphasis should be placed on improving perceptions of ease of doing business and national products and brands, where gains would have an outsized impact on investment and trade appeal.

- Latvia should more **explicitly link its business successes to perceptions of being advanced in technology and innovation, underpinned by a strong Education & Science base**. Promoting this connection would position Latvia as an attractive destination to study, invest and source products from. Encouragingly, Latvia already outperforms Lithuania and Estonia on investment appeal in Sweden, Finland, and Germany, signalling clear momentum to build on.
- Strong performance in education highlights **Latvia's pool of well-educated young professionals**. More visible promotion of this talent base would strengthen appeal among investors, international businesses and prospective students or residents. In parallel, Latvia's relatively strong perceptions of trust and credibility, both in its media environment and among its people, reinforce its positioning as a reliable place to invest in and do business with.
- There is also clear **scope to learn from Estonia's digital-led positioning while differentiating Latvia's offer through its own strengths, e.g. green technology and innovations**. Latvia can credibly position itself as an open, business-friendly Baltic hub, anchored in strong associations with the Baltics and Northern Europe.
- Latvia's central geographic position and strong air, sea, and land connectivity provide a further advantage. The nation can **position itself as the connector and gateway of the Baltics**, a role that aligns naturally with how the region is perceived internationally. This narrative can be reinforced through collaboration with airBaltic, whose strong regional recognition offers a powerful platform for visibility and brand association.
- Riga's central location also supports a **tourism and business narrative** in which visitors are encouraged to enter the region through Latvia, using it as the starting point for a wider Baltic journey. This approach aligns with the development of Rail Baltica and supports a sustainable, slow-travel model, **positioning Riga as the natural beginning and end point of the Baltic experience**.



# Recommendations

## 5. Position Latvia as a hub for sustainable tourism and a more affordable Nordic-style destination with a distinctive range of experiences

Being perceived as a **great place to visit is a significant driver of reputation**.

Hence, it is crucial for Latvia to develop a competitive tourism brand built around an authentic and differentiated offering. Targeting the right type of visitors is equally important to **encourage sustainable, slow tourism** that allows travellers to experience genuine Latvian culture and nature. Great place to visit is already Latvia's strongest-performing attribute in terms of the level of association, pointing to goodwill to build on. However, it ranks only 73rd globally due to the highly competitive nature of the global tourism sector.

Visiting a country provides a **powerful opportunity to shape perceptions and challenge existing biases**. First-hand experiences also can influence longer-term decisions, such as where to study, relocate, invest or do business. Latvia has a clear opportunity to further bolster its sustainability credentials by positioning itself as a hub for sustainable tourism, encompassing responsible, eco and slow travel:

- By **targeting the right audiences**, Latvia can attract responsible travellers who minimise their environmental footprint and actively **contribute to local communities, helping preserve and enhance natural and cultural assets**. Initiatives such as Slovenia's Green Scheme, the Faroe Islands' 'Closed for Maintenance', and New Zealand's Tiaki Promise demonstrate how clear expectations can turn tourism into a net positive for places and people.
- This includes travellers interested in sustainable mobility (e.g. cycling, interrailing), eco-tourism, and slow tourism focused on relaxation, stress reduction and low-impact, nature-based activities such as swimming, walking and running, while **actively supporting local businesses, including bio and eco farmers and producers**.
- A further opportunity for slow tourism lies in **Latvia's long, largely unspoiled coastline**, where natural beaches offer space for relaxation, mental wellbeing and family holidays, while reinforcing Latvia's appeal as a calm, nature-led alternative to more crowded destinations.
- Moreover, Latvia, alongside the rest of the Baltics, has the potential to **position itself as a more affordable alternative to the Nordics**, while being no less rich in hospitality, culture, gastronomy, nature and experiences to explore.

To support this positioning, Latvia should actively **showcase its offering through social media, including collaborations** with TikTok and YouTube influencers from key markets.

This approach can help raise awareness and generate interest, similar to Albania's recent success as an emerging beach destination on TikTok and Georgia's effective use of striking visuals to attract international visitors.





# Recommendations

## 6. Boost international recognition and leverage support of Ukraine

Latvia, Estonia, and Lithuania are often **grouped together in international perceptions as the Baltic region**, with global attention typically extending across all three nations rather than distinguishing clearly between them. Within this shared visibility, Latvia ranks lower than Estonia and Lithuania across the International Relations, Media & Communication, and Governance pillars, indicating that **Latvia's initiatives and leadership are less visible internationally**. Moreover, Latvia ranks below Lithuania across most attributes in the US, a key market for security, reflecting Lithuania's greater success in building stronger links with the US on the international agenda.

- Latvia should therefore **adopt a more vocal and consistent external posture**. Actively promoting key political figures like President Edgars Rinkēvičs or the EU commissioner and former prime minister Valdis Dombrovskis would give the nation brand a **clear and recognisable face**, strengthening perceptions of internationally admired leadership – an important driver of soft power.
- Latvia also has an opportunity to **elevate its profile by highlighting Prime Minister Evika Siliņa's current leadership** as well as the leadership of the former president Vaira Vīķe-Freiberga. With women still underrepresented in senior political roles globally, this offers a timely opportunity to reinforce perceptions of Latvia as **progressive, inclusive and values-driven**, similar to the international recognition Lithuania and Estonia gained through female leadership.
- As the initial 'halo effect' from Latvia's **support for Ukraine** gradually fades, Latvia should treat this visibility as a **springboard rather than a single narrative**. Continued support for Ukraine can anchor credibility, but lasting relevance will come from **linking this stance to broader global agendas** such as security, democratic resilience, sustainability and international cooperation. This would help Latvia remain visible and relevant beyond the conflict itself, rather than being defined by it alone.
- Among the three Baltic states, Latvia is also perceived as the **least easy to communicate with, potentially reflecting lower visibility, fewer consistently recognised spokespersons and less proactive international engagement** rather than language barriers. Addressing this will require clearer points of contact, more consistent external messaging, and stronger participation in international media, policy forums and business networks, making Latvia feel more accessible and responsive to global audiences.

Finally, against the backdrop of ongoing regional security challenges, **continued focus on strong Governance remains essential**. International messaging should consistently reinforce Latvia's reputation as politically stable, well-governed, secure, trustworthy and ethical, ensuring Governance underpins long-term reputation and influence.



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# Further Opportunities for Latvia





# Our Place Branding Services

As immediate next steps, we recommend undertaking (A) qualitative research and drivers analysis to uncover Latvia's strongest differentiators, (B) building a clear nation brand strategy through a comprehensive positioning exercise, and (C) launching marketing communications for Geographical Indication food and drink products

 <b>RESEARCH</b>	Quantitative Research	Qualitative Research	Stakeholder Interviews	Search Analysis	Coverage Analysis	Social Listening
 <b>ANALYSIS</b>	Competitor Benchmarking	Annual Tracking	Drivers Analysis	Brand Strength	Brand Value	ROI Analysis
 <b>STRATEGIC CONSULTING</b>	Brand Strategy	Soft Power	Investment Trade Talent Tourism	Sustainability	Sports & Sponsorship	Budget Setting
 <b>MARKETING &amp; COMMS</b>	Strategic Comms	Crisis Comms	Public Diplomacy	Campaign Execution	Events	Training

Included in the current report

Recommended immediate extensions

# OPPORTUNITY A: Qualitative Market Research

Brand Finance's senior research professionals design research programs employing mixed methods and leveraging professionally maintained response panels

## Understanding the Issues



Having worked extensively with and within client organisations, our trained, experienced research professionals can identify your strategic problems and translate them into researchable questions.

Using our experience, we can identify how fact-driven insight can help answer the problem and move your business forward.

## Designing the Solution



Brand Finance's researchers are method-agnostic. We pride ourselves on designing research programs that can add context to a problem, or define a market-centric solution, or both.

We know the advantages of different research methods and can design complex multi-method projects if required.

## Overseeing the Research



From small to large scale, multi-method and international projects, Brand Finance has designed and delivered projects of multiple sizes around the world.

Our largest project, the Global Soft Power Index, includes 170,000+ respondents in 100+ markets. From here, our smaller projects include niche audiences of less than 10.

## Delivering Insight and Strategy



With decades of experience delivering research, we have the experience to understand how to translate research results into market insights, then into business solutions.

Experience with creative, marketing and media agencies to help move research from result into action and can partner with them to seamlessly implement business strategy.

**Bespoke Programmes**

**Syndicated Studies**

**Quantitative Research**

**Qualitative Research**

**Specialist Audiences**

**Drivers Analysis**

**In-Depth Analysis**

# OPPORTUNITY A: Drivers Analysis

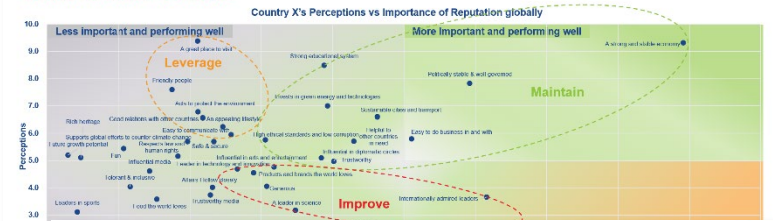
Understand what attributes drive your soft power to focus your policy and marketing on issues that are most likely to change perceptions and behaviour of target segments

Adding more depth to the Soft Power Report, Brand Finance will conduct additional **drivers analysis based on the Global Soft Power Index 2025** data:

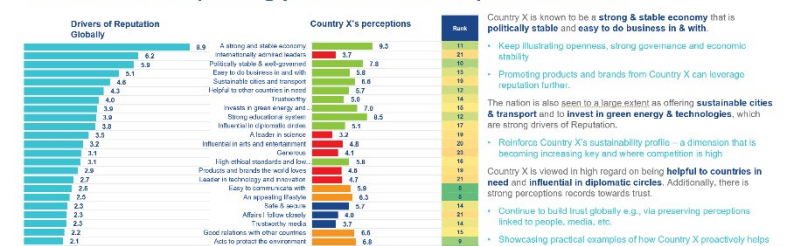
- ✓ Approach: conduct regression analysis on respondent-level data to understand **relationship between each of the 35 attributes and KPIs: Reputation, Influence, 5 Recommendation dimensions**
- ✓ Your Brand: share global drivers of Reputation and Influence **specifically regarding your nation brand** to understand which perceptions generate a Soft Power premium for your nation brand
- ✓ Markets: to complement global analysis from the core Soft Power Report, share drivers of Reputation and Influence in **selected markets to identify geographical differences**
- ✓ Recommendation: run **global drivers analysis for specific Recommendation dimensions** – to identify what drives nation brand attractiveness in investment, trade, talent, education, and tourism
- ✓ Demographic focus: the global Recommendation drivers can be limited to **specific demographics**, considering gender, age, education, employment to tailor your communications further
- ✓ Strategic advice: map the relationship between the importance of drivers and perceptions of your nation brand to **identify priority areas of focus** for your policy and marketing in each segment

## Drivers of Reputation vs. Country X's Perceptions

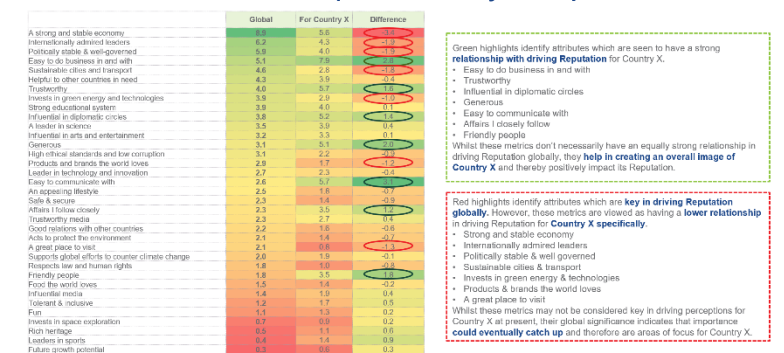
Country X commands a strong Reputation, which can be further improved by promoting international leadership and advancement in science. There are also several attributes that have less impact on Reputation but have been promoted successfully over the years and offer value that can be leveraged.



## Country X should focus on maintaining perceptions on core drivers whilst improving profile of leadership and science



## Stability and leadership weigh more on a global scale, whilst softer attributes have more impact on Country X's Reputation



# CASE STUDY: Swedish Institute

## Nation Brand Research & Strategy & Drivers Analysis

### Core Values

- ✓ Sweden's nation brand is grounded in principles of democracy, equality, and sustainability. Its identity is shaped by a long tradition of peace, social justice, innovation, and trustworthiness.

### Approach

- ✓ Sweden leads with a data-driven, unified approach to nation branding, coordinated by the Swedish Institute and its Team Sweden network of 100+ public and private stakeholders. The strategy combines:
  - ✓ Focuses on core strengths: governance, innovation, sustainability, and human rights
  - ✓ Aligns global messaging while allowing local adaptation
  - ✓ Equips stakeholders with clear brand guidelines, insights, and tools
  - ✓ Tracks impact using the Global Soft Power Index and real-time market data
  - ✓ This ensures Sweden's voice is globally consistent, locally relevant, and strategically sharp.

### Brand Finance's Role

- ✓ Brand Finance supports the Swedish Institute in embedding data-driven insights at the heart of Sweden's nation brand strategy.
- ✓ We provide annual Global Soft Power Index data and bespoke analysis to guide both long-term positioning and short-term tactical planning ahead of diplomatic visits and trade missions. Our work benchmarks Sweden's strengths and gaps across global, regional, and market levels, enabling focused, evidence-based messaging across key sectors.
- ✓ Our investigation included:
  - ✓ Drivers Analysis to identify the most influential attributes shaping perceptions of Sweden's Reputation and Influence in priority markets
  - ✓ Drivers of Reputation and Influence specifically for Sweden compared to all brands combined
  - ✓ Comparative benchmarking to evaluate Sweden's performance against peer nation brands
  - ✓ Strategic recommendations that directly informed the development of Sweden's updated nation brand strategy
- ✓ These insights allow Sweden to tailor its global communications while maintaining a coherent, values-led identity anchored in governance, innovation, sustainability, and human rights.



"Being perceived as a country contributing to the common good is an asset from a brand perspective. For Sweden, this is especially evident in its contribution to the green transition and its support for other countries in need."

**Sofia Bard**  
Head of Unit, Sweden Image Analysis,  
Swedish Institute



# CASE STUDY: Enterprise Estonia

## Nation Brand Research & Strategy & Drivers Analysis



### Core Values

- ✓ Estonia's nation brand is built on innovation, transparency, and digital advancement, positioning the country as a global leader in digital Governance with all public services accessible online.

### Approach

- ✓ Estonia adopts a data-driven, collaborative nation branding strategy powered by insights from the Global Soft Power Index.
- ✓ Enterprise Estonia leads the charge, uniting public and private stakeholders through a national "Team Estonia" network to deliver a consistent, authentic brand message globally.
- ✓ The strategy highlights Estonia's; while remaining adaptable without compromising a cohesive national identity.
- ✓ Enterprise Estonia actively promotes innovation, export growth, tourism, investment, and talent attraction.
- ✓ This integrated, insight-led approach ensures Estonia's brand evolves with global perceptions, positioning the country as a smart, forward-thinking hub on the world stage.

### Brand Finance's Role

- ✓ Brand Finance supports Enterprise Estonia in embedding data-driven insights at the heart of Estonia's nation brand strategy. Our work benchmarked Estonia's strengths and gaps against peer nation brands and global averages, enabling focused, evidence-based messaging across key sectors.
- ✓ Our investigation included:
  - ✓ Drivers Analysis to identify the most influential attributes shaping perceptions of Estonia's Reputation and Influence
  - ✓ Drivers of Reputation and Influence specifically for Estonia compared to all brands combined
  - ✓ Comparative benchmarking to evaluate Estonia's soft power against three peer nation brands
  - ✓ Strategic recommendations that directly supported the development of Estonia's updated nation brand strategy
- ✓ These insights enable Estonia to confidently position itself as an innovation testbed, smart manufacturing hub, and an attractive destination for tourism, investment, and talent. Estonia has also created a promotional chatbot to help embassies tailor messaging, powered by our data and aligned with the national strategy.



"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."

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

# CASE STUDY: New Zealand Story

## Nation Brand Research & Strategy & Drivers Analysis

### Core Values

- ✓ New Zealand's brand is built on core values of curiosity and innovation, care for people and the environment, respect and warm relationships, and integrity.

### Approach

- ✓ New Zealand Story drives the nation brand with a bold, coordinated strategy, combining targeted campaigns, global media partnerships, and authentic storytelling.
- ✓ New Zealand's strengths in innovation, culture, natural beauty, and values-led leadership, using cross-sector collaboration to engage investors, tourists, students, and global partners. Their strategy combine:
  - ✓ Data-driven, with tools like the Global Soft Power Index used to track perceptions and shape messaging
  - ✓ Integrated across government, ensuring alignment between tourism, trade, education, and foreign affairs
  - ✓ Continuously refined, drawing on media monitoring, market insights, and stakeholder feedback
  - ✓ They ensure the brand is not only consistent, but compelling, competitive, and globally resonant.

### Brand Finance's Role

- ✓ Brand Finance supports New Zealand Story in embedding data-driven insights at the core of their nation brand strategy.
- ✓ We analysed New Zealand's soft power performance, brand value, and drivers of global perception, delivering actionable insights that shaped positioning across priority sectors including trade, tourism, talent, and investment.
- ✓ Our investigation included:
  - ✓ Driver analysis to pinpoint which attributes influence reputation and influence on a global and market-level
  - ✓ Scenario simulations to show how perception shifts could improve global rankings
  - ✓ Macroeconomic context through nation brand valuation
- ✓ Findings were presented to Prime Minister Jacinda Ardern and used to inform strategy and trade missions abroad.
- ✓ A key recommendation was to elevate messaging around technology, innovation and the space sector, aligning these forward-looking themes with New Zealand's core values of care for people, place and planet.



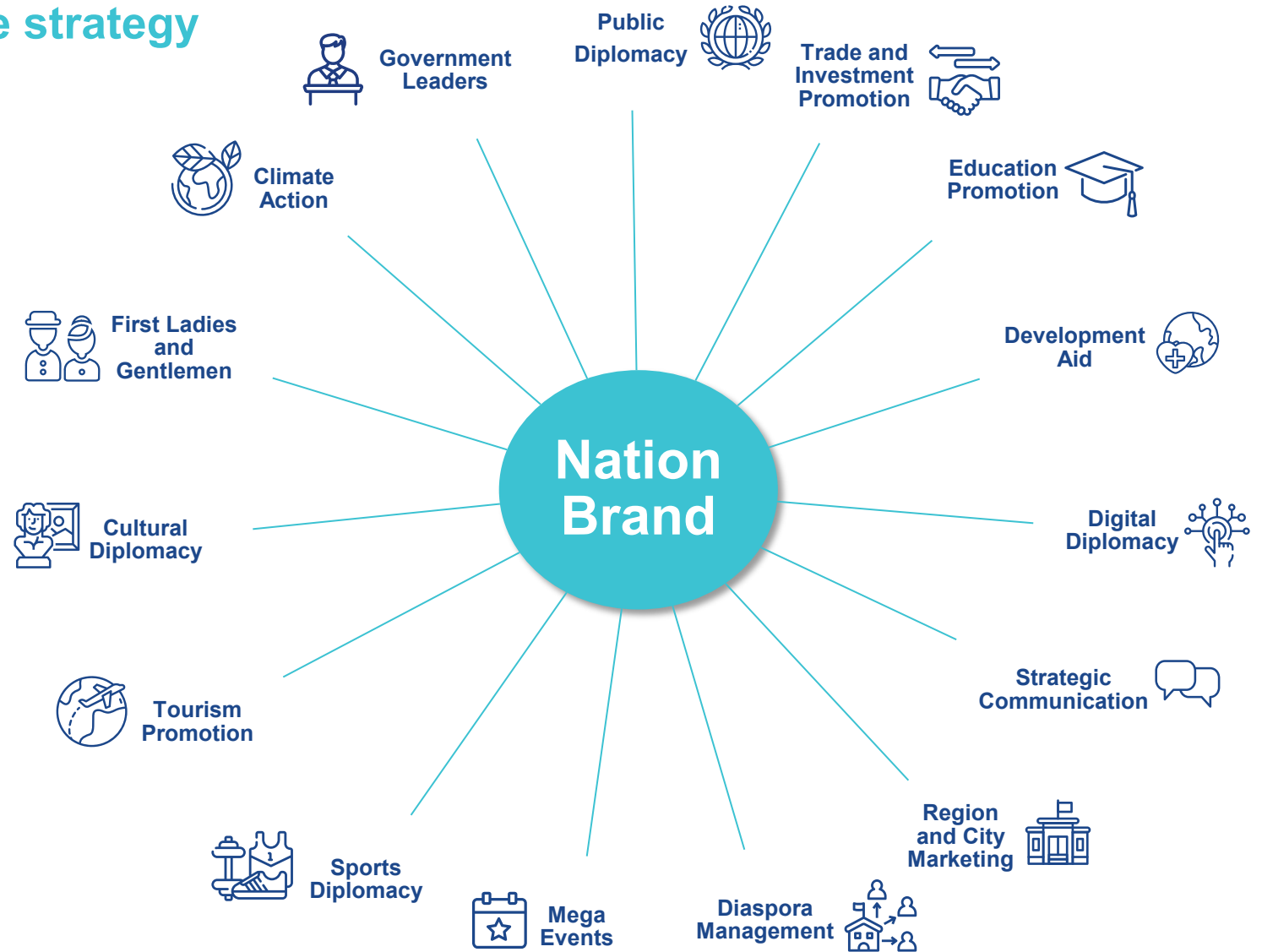
"We set out to align partner organisations around a research-driven strategy to enhance the nation brand's economic impact. Brand Finance's data provided globally validated insight on New Zealand's credible positioning: improving science, technology, and innovation perceptions as key drivers of influence."

**David Downs**  
CEO, New Zealand Story

# OPPORTUNITY B: Nation Brand Strategy

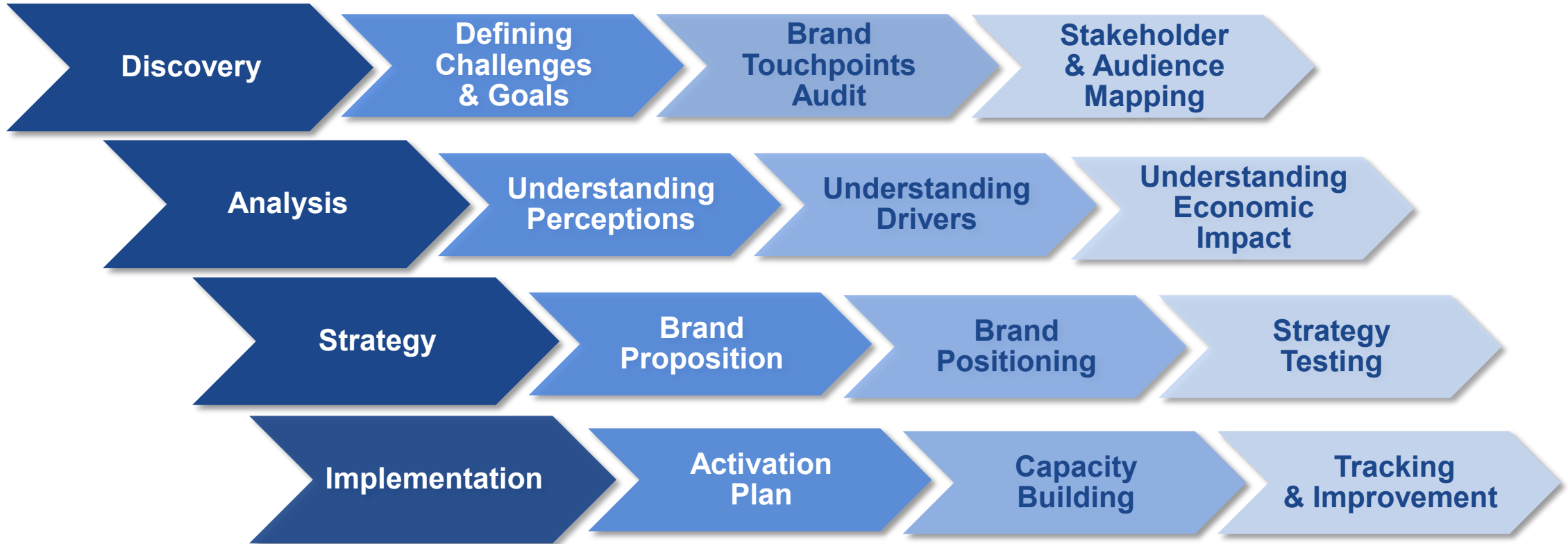
## Coordinating channels through one strategy

- There are many ways of engaging with the world and **telling your nation's story**
- Each channel targets **unique audiences** and shapes international and domestic perceptions
- The key is to **coordinate all these efforts** through one nation brand strategy
- A **unified nation brand narrative** creates a powerful, cohesive identity that inspires pride at home and respect abroad
- **Strategic efforts** enhance a country's reputation, boost economic performance, and strengthen global partnerships



# OPPORTUNITY B: Steps to a Successful Strategy

Brand Finance can support you across the whole process or at a particular stage



- ✓ Relying on our experience in **brand measurement** and our unique expertise in **brand economics**, our place brand strategy projects are rooted in a solid foundation of facts and numbers
- ✓ Leveraging the wealth of talent across the Brand Finance core place branding team and global network, we deliver creative yet economically **impactful brand strategies**
- ✓ Our annual perceptions studies and bespoke research designs allow for effective **testing before implementation as well as tracking of progress and measuring success**, providing accountability with key stakeholders



# CASE STUDY: British Council

## Nation Brand Strategy

### Background

- ✓ The British Council is the United Kingdom's international organization for cultural relations and educational opportunities.
- ✓ It supports peace and prosperity by building connections, understanding and trust between people in the UK and countries worldwide.

### Challenge

- ✓ At different stages of its development over the last 15 years, the British Council marketing and brand team counted with the expert advice of one of our team members to understand the power of its brand and leverage opportunities to provide better clarity and engage with stakeholders around the world.

### Approach

- ✓ This is a selection of projects developed for the British Council:
- ✓ Brand valuation and benchmarking of other international relations organisations
  - ✓ Rearticulation of the British Council brand strategy in response to shifts in income streams
  - ✓ Decision tree to analyse risks and opportunities, prioritise and define strategic partnerships
  - ✓ Internal research with key decision makers to identify organizational challenges and priorities, followed by facilitation of leadership alignment processes
  - ✓ Rearticulation of the British Council purpose and narrative as an update to its brand strategy.

### Outcome

- ✓ The British Council brand is clearer internally and externally, and better positioned among its core audiences, providing more stable income to the organisation and delivering better value to its audiences both in culture and education.
- ✓ (The specific outcomes of these activities are confidential)



**Paula Oliveira**  
Senior Strategy  
Director

- Paula is a Senior Strategy Director at Brand Finance based in London.
- She held leadership positions in prestigious consultancies before she led her own business
- She led strategy and creative teams who developed impactful work ranging from brand valuation, insights, brand strategy, brand-led transformation, leadership alignment, and employee engagement.
- Previous clients include: British Council, Gates Foundation, Arcadis, Renault, and Samsung.

# CASE STUDY: Tourism Malaysia

## Nation Brand Strategy

### Background

- ✓ Tourism Malaysia is the national agency tasked with positioning Malaysia as a leading global travel destination.
- ✓ Its mandate includes driving international marketing campaigns, forging strategic partnerships, and spearheading tourism development initiatives to increase visitor arrivals and strengthen the country's tourism economy.

### Challenge

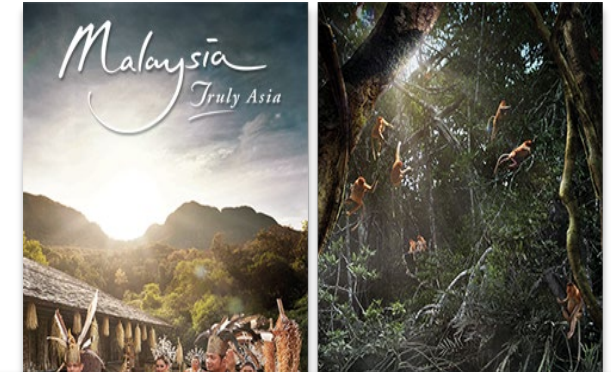
- ✓ During a period of rapid growth, Malaysia's tourism industry faced the need for a unified and compelling brand strategy that could be embraced by state tourism boards and key stakeholders.
- ✓ The objective was to better understand evolving consumer interests and create a positioning that would differentiate Malaysia in an increasingly competitive global tourism market.

### Approach

- ✓ Dr Paul Temporal and his team undertook a comprehensive brand audit to assess market opportunities and benchmark successful strategies implemented by other countries. The process included:
  - ✓ Qualitative research through interviews with visitors, businesses, media representatives, and influential opinion leaders.
  - ✓ Comparative analysis of global tourism branding best practices.
  - ✓ Identification of emerging consumer trends and cultural preferences.
  - ✓ The research uncovered a significant market gap: strong consumer interest in authentic Asian cultural experiences, which aligned perfectly with Malaysia's rich multicultural heritage.

### Outcome

- ✓ The insights informed the creation of the Malaysia – Truly Asia brand strategy, now widely recognised as one of the most successful tourism campaigns globally.
- ✓ The positioning highlighted Malaysia's unique multicultural identity and diversity.
- ✓ The strategy was presented to and approved by the Prime Minister, ensuring top-level endorsement.
- ✓ Full buy-in from state tourism boards and stakeholders enabled consistent messaging across all markets.
- ✓ The campaign resonated strongly with international travellers, resulting in sustained year-on-year growth in visitor numbers and reinforcing Malaysia's status as a premier travel destination.



**Dr Paul Temporal**  
Nation Branding  
Expert & Advisor

- Paul is the chief academic advisor to the annual Global Soft Power Index, and advisor to Brand Finance on Nation Branding
- Over 30 years of business consulting experience in both public and corporate sectors. Notable clients include ADB, APEC, ASEAN, OIC, UNCTAD, GCC and several Governments
- Helped develop the *Malaysia – Truly Asia* tourism brand strategy
- Has written 17 best-selling books on Brand Strategy and Management
- Associate Fellow at Saïd Business School, University of Oxford

# CASE STUDY: South African Tourism

## Nation Brand Strategy

### Background

- ✓ South African Tourism (SA Tourism) is the official government agency responsible for promoting tourism to and within South Africa.
- ✓ Established in the 1990s during the country's post-Apartheid transition, SA Tourism plays a pivotal role in positioning South Africa as a leading global destination and driving growth in the tourism sector.

### Challenge

- ✓ At the time, South Africa lacked robust research and insight into its target markets and consumer segments, making it difficult to develop a competitive tourism strategy.
- ✓ Furthermore, there was no clear articulation of what South Africa stood for as a destination, creating challenges in defining the nation's brand identity and identifying key elements for brand development.

### Approach

- ✓ To address these gaps, a comprehensive market research and insight-gathering programme was launched, targeting major global markets such as the USA, Western Europe, China, and Sub-Saharan Africa.
- ✓ David and his team conducted:
  - ✓ Workshops with demand- and supply-side stakeholders to shape the brand strategy collaboratively.
  - ✓ Development of brand positioning, architecture, and segmentation frameworks.
  - ✓ Analysis of traveller preferences and motivations to identify South Africa's unique appeal.
  - ✓ The findings highlighted distinct holiday preferences that informed a globally competitive brand positioning for South Africa.

### Outcome

- ✓ The research provided actionable insights into the decision-making process of travellers from Europe, the US, and Asia, enabling SA Tourism to identify new focus areas and growth opportunities.
- ✓ By prioritising segments such as **business and shopping tourism**, South Africa refined its target audience and developed more tailored communication and advertising strategies.
- ✓ This approach strengthened South Africa's brand identity and improved its ability to compete in the global tourism market.



**David Wingfield**  
Strategy  
Director

- David is a Strategy Director at Brand Finance Africa
- Over 30 years of experience in brand marketing, with global clients including but not limited to BMW, Land Rover, Nissan, Reckitt Benckiser, Apple, SAA, SA Tourism, and Visa
- Prior to joining Brand Finance, he spent 20 years in the banking world. His positions included CMO at Standard Chartered Bank in Africa and Head of Marketing at Barclays Africa Group (Absa)
- Worked as a Managing Director at TBWA for over 11 years
- BCom in Marketing, Economics and Law from the University of KwaZulu-Natal

# OPPORTUNITY C: Experience with GI Products

## Brand Dialogue - developing communications to create dialogue that drives brand value

- Brand Dialogue is a **public relations agency** with more than **25 years** of experience in **delivering marketing communications strategy as well as campaigns** driven by research, measurement, and strategic thinking.
- Our **approach is integrated**, employing tailored solutions across PR, marketing, and social media.
- Our collaborative, **multi-disciplinary methods**, as well as our commitment to achieving results, have helped us establish and sustain strong client relationships.
- We have worked with **companies of all shapes and sizes**, across multiple sectors, some of whom have been with us for over 20 years.
- We have a specific **focus on geographic branding**, including supporting place brands and brands with a geographical indication (GI).
- Brand Dialogue is a **member of the Brand Finance Plc** group of companies with presence in 25 countries worldwide, and in addition to its external client work, acts as Brand Finance's exclusive PR agency **publishing and disseminating 100+ reports on an annual basis**.

Brand Dialogue®



COLOMBIA



VISIT **FLORIDA**





# OPPORTUNITY C: Marketing Communications Services

Our marketing communications services



**RESEARCH,  
STRATEGY & MEASUREMENT**

Brand & Communications Strategy  
Campaign Planning  
Market Research & Insights  
Media Analysis



**PUBLIC RELATIONS &  
COMMUNICATIONS**

Media Relations  
Press Trips & Events  
Strategic Partnerships &  
Influencer Outreach  
Social Media Management



**MARKETING & EVENTS**

Promotional Events  
Conference Management  
Native & Print Advertising  
Retail Marketing



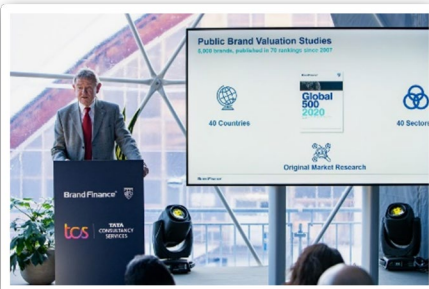
**CONTENT CREATION**

Bespoke Publications  
Blogs & Newsletters  
Press Releases  
Marketing Collateral Design  
Social Media Content



**STRATEGIC  
COMMUNICATIONS**

Crisis Communications  
Brand Positioning & Reputation  
Geographic Branding  
Corporate Social Responsibility  
(CSR)



# CASE STUDY: Prosciutto Di Parma

## Marketing Communications – Social Media & Media Relations



### Background

- ✓ Brand Dialogue have worked with Parma Ham for over 20 years, implementing campaigns to increase visibility and promote the products authenticity, flavour, and heritage through strategic PR and marketing campaigns.
- ✓ Position Parma Ham as a versatile, everyday ingredient, shifting consumer perception from occasional use to regular incorporation into British cuisine.

### Challenge

- ✓ Brand Dialogue aimed to **expand** Parma Ham's **market penetration** in the UK by **pairing the brand** with a well-known and liked **UK celebrity chef** – Clodagh McKenna.

### Approach

- ✓ **Social Media:** Brand Dialogue worked with Clodagh McKenna to create engaging social media content in a reel/video format, spanning across relevant events to seasonal recipes.
- ✓ **PR:** Clodagh assisted in hosting a Parma Ham press event with high-profile publications and influencers in attendance, as well as offering her voice in select press releases and media coverage.
- ✓ **Event:** Clodagh McKenna attended the BBC Good Food Show as the UK Parma Ham brand ambassador, in order to create an association with Clodagh and the Parma Ham brand in the eyes of UK consumers.

### Outcome

- ✓ Associating a respected and well-known chef with Parma Ham within the foodie community, and garnering coverage with a reach of 2,141,411.
- ✓ Creating a figure for consumers to engage with when purchasing or cooking with Parma Ham.
- ✓ Parmigiano Reggiano UK's posts on social media achieved a reach of 253,165 with 106,893 views and 334,015 impressions.
- ✓ Creating engaging content through current digital marketing techniques resulting in a reach of 317,093 on select social media platforms.



Clodagh McKenna Becomes Parma Ham UK's Newest Brand Ambassador

by Editorial Team Published 20 September 2023 at 13:52



TV chef and food writer Clodagh McKenna has been announced as Parma Ham UK's newest brand ambassador. This exciting collaboration, arising from Clodagh's shared passion for fresh and sustainable produce, is set to combine Parma Ham with Clodagh's expertise.

# CASE STUDY: Parmigiano Reggiano

## Marketing Communications – Event & Media Relations



The *only* Parmesan.

### Background

- ✓ Parmigiano Reggiano has been a client of Brand Dialogues for over 20 years.
- ✓ During this time, we have assisted with digital marketing, events and PR, raising awareness of the brand quality and heritage within the UK.

### Challenge

- ✓ Organise the Casello D'oro Awards ceremony in a historic location in London to celebrate over 70 producers from the consortium.

### Approach

- ✓ **Event:** Brand Dialogue planned an award ceremony at the British Museum, presenting awards to the producers that have been making Parmigiano Reggiano for years. Featuring top UK chefs and experts as judges.
- ✓ **PR:** Key journalist publications were invited to the event, along with The Telegraph and Vanity Fair, who we partnered with to promote the brand and event. Followed by a press release to UK press.
- ✓ **Heritage Brand Recognition:** Brand Dialogue invited key players in the foodie industry to attend the event to encourage brand recognition and promote the importance of PDO and heritage brands.

### Outcome

- ✓ Brand Dialogue organised the event at the British Museum that was attended by 170 people partnering with notable publications, The Telegraph and Vanity Fair.

### Vanity Fair:

- ✓ Vanity Fair delivered 5,688 page views (114%) as well as 5,200 unique users
- ✓ Traffic drivers delivered 160,169 impressions
- ✓ Paid social was activated on Instagram and Facebook, the posts garnered a reach of 147,245, 265,907 impressions, 326 engagements and 8,706 link clicks
- ✓ Organic coverage garnered 183,000 UVPM and a reach of 7,500
- ✓ Promoted the Importance of Heritage for Parmigiano Reggiano to the UK Market



## Contact us

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Konrad Jagodzinski

Place Branding Director

Brand Finance Plc

E. [k.jagodzinski@brandfinance.com](mailto:k.jagodzinski@brandfinance.com)

Aleksander Oniscenko

Associate Director - Research

Brand Finance Plc

E. [a.oniscenko@brandfinance.com](mailto:a.oniscenko@brandfinance.com)

Anezka Postlerova

Place Branding Analyst

Brand Finance Plc

E. [a.postlerova@brandfinance.com](mailto:a.postlerova@brandfinance.com)

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