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# Global Britain: the UK's soft power advantage

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# Foreword

The UK is a 'soft power superpower' – the British Council's new report, *Global Britain: the UK's soft power advantage*, officially confirms that the UK is the most attractive country in the G20 group of nations. The culture of the UK, both in the narrow sense of arts or sport but also in the wider sense of the values and civil and political freedoms of the people of the UK, is absolutely central to that privileged status.

The report explores young people's perceptions of the world's great economic powers, the G20 group of nations. Young people, the leaders of tomorrow, recognise climate change and poverty as the most pressing issues facing the world today and want to see collective international action to deliver a better, more sustainable future for the people of the world. They also prize equality and diversity, co-operation and tolerance, and peace, and look positively at open, free and liberal democracies that best exemplify these values – countries like Australia, Canada, Germany and the UK.

While the report's headline finding is to be welcomed, looking at the data in greater detail reveals a more complex picture. The report highlights just how fragile the UK's lead over other liberal democracies is, with the tiniest margin between first and fifth place in the rankings for overall attractiveness. There are significant geographical divisions as well. The UK is in a strong position in Commonwealth countries and in states across the Indo-Pacific. However, there are challenges to address in the way in which the UK is perceived by some in Europe. To capitalise on the wealth of opportunities available in Asia and Africa and renew relations with its continental neighbours will require considerable effort.

In practical terms that means investment in the overseas networks and educational and cultural institutions that are so core to the UK's international attractiveness. The UK's commitment to international development plays a very significant part in shaping positive attitudes towards the UK and keeping the commitment to return to previous levels of foreign aid will therefore be important. The UK's future success also means building on reforms which allow people to visit, study and work in the UK, to get that immersive experience of living in the country that fosters understanding and trust. Last but by no means least, it requires an approach to Global Britain that is rooted in the nation's values and demonstrates a commitment to multilateralism and global progress on human rights and international issues like climate change and poverty reduction.

There is much work to be done. But with the right approach, the UK can continue to build on its impressive record as a soft power people see as a genuine force for good, recognised for its values and its institutions right around the world.

**Kate Ewart-Biggs** OBE
Interim Chief Executive

# Executive summary

In an increasingly complex, multipolar world with rising powers seeking to increase their regional and global influence, the UK's soft power grows ever more important. Whether it is negotiating a trade deal or building the alliances needed to address international challenges like climate change or COVID-19, it is crucial to be recognised as a reliable, trustworthy partner willing and capable of working with others – to be seen as a force for good in the world.

When it comes to soft power the UK enjoys a strong position relative to its rivals – the British Council's most recent soft power survey of young people's opinions has found that it is the most attractive country in the G20 group of nations. However, the data also reveals that soft power is an increasingly competitive field with both established and emerging challengers eager to take the crown.

As the UK begins the task of implementing the ambitious long-term vision and objectives set out in the Integrated Review, it is important that it does so with a comprehensive understanding of the people with whom we are seeking to connect and our standing in their eyes. Public opinion provides important context for official bilateral engagement between countries. Perceptions shape behaviours and decisions, so the findings in the British Council's soft power survey offer valuable insights into the relative standing of the UK and other leading powers. The headline findings from 2020 are:

- the UK is ranked first for overall attractiveness and second for trust in the G20
- the UK is in an especially strong position in Commonwealth countries, an important strategic advantage, especially in Sub-Saharan Africa
- positive data from countries across Asia supports the government's 'Indo-Pacific tilt' strategy
- although the UK performs well overall, the data from European countries reveals an enduring negative impact from the UK's exit from the EU
- soft power increases reputational resilience; countries that enjoy high levels of trust and attractiveness are able to weather international controversies
- cultural and educational exchange plays an important role in positive perceptions of the UK. Where this is curated by the British Council trust in the UK government increases by 16 per cent.

In any discussion about international perceptions the great unknown is the impact of COVID-19. The fieldwork for the 2020 survey was carried out in February and March, coinciding with the pandemic's first wave in Europe. There has clearly been an impact on the results, most apparently in attitudes towards China but also more generally in perceptions of trust internationally. However, because of the timing of the fieldwork the survey cannot offer significant insights into the impact of the pandemic on perceptions of the UK.

**In any discussion about international perceptions the great unknown is the impact of COVID-19.**

The medium- and long-term impacts of COVID-19 are also unclear. The pandemic has the potential to radically shift perceptions, but as a truly global event it's also possible any impact may be temporary, with the events of 2020 discounted as a one-off aberration. If that proves the case the results of future surveys should return to their pre-COVID-19 scores. This is the most likely outcome, especially for a country like the UK that, thanks to its soft power, benefits from a resilient reputation internationally. There will perhaps be a few individual exceptions where local events have had cut through with international audiences – one positive example of which is the runaway success of the UK's vaccine scheme.

The UK is a world leader in soft power – a soft power superpower – but as the data clearly shows it is very much first among equals with the competition closer than ever. There is no room for complacency: if the UK fails to continue to prioritise soft power, there are others all too ready to seize the advantages it currently enjoys.

While being alive to the increasing challenge posed by competitors, there are plenty of reasons to be optimistic for the future of Global Britain. The UK is embarking on a new course from a position of soft power strength. It is an enviable position as an attractive, trusted international actor. The seas ahead may be unpredictable with hidden reefs and stormy skies requiring careful negotiation, but so long as optimism is aligned with realism about the interventions and investment needed to meet the challenges ahead, the ambitious plans set out in the Integrated Review for the UK to sustain and build upon its status as a soft power superpower are achievable.

People around the world are keen to engage with the UK, for trade and for cultural, educational and scientific exchange. The UK is seen as a force for good in the world, a valued, trusted partner in the fight against global challenges like climate change. It is a soft power superpower, albeit one facing increasing competition – from friends and rivals alike. Success in the years ahead lies in ensuring it retains its position as first among equals, the most attractive country in the G20.

**The UK is a world leader in soft power – a soft power superpower – but as the data clearly shows it is very much first among equals with the competition closer than ever.**

# Introduction

Now in its fifth edition, the British Council's soft power survey of young people's perceptions examines how attitudes shift and change over time, offering insight into how views of a country's brand evolve. These perceptions matter as they drive behaviours with significant implications for the prosperity and security of the UK. The data on attractiveness and trust provides a window into the impact of major events such as the UK's exit from the EU on people's views. This report sets out how perceptions of the member states of the G20 have shifted over time and considers what may lie behind the changes.

The British Council has been surveying the views of young people from across the G20 group of nations every two years since 2012. It can be difficult to distinguish between the surface froth and the deeper currents that shape the views revealed by a survey on any one day. It is only by tracking perceptions over time that we can observe how perceptions of countries evolve and distinguish between temporary blips and long-term, lasting shifts in opinion.

The age range of the sample, 18- to 34-year-olds, offers insight into the views of the future leaders in politics, business, education and culture. These will be the people the UK will need to engage over the next 20–30 years if it is to continue to develop its international partnerships.

In 2016, in an effort to understand how the EU referendum affected opinions of the UK, the British Council ran two surveys – one before the vote and the second in the weeks following the UK's decision to leave the EU. Throughout this report we refer to the pre-referendum (pre-ref) and post-referendum (post-ref) surveys. Though they used similar methodologies, the 2012 and 2014 surveys focused on a smaller subset of countries, so the British Council only has directly comparable data for the G20 as a whole from the surveys in 2016, 2018 and 2020. We therefore usually use the first of the two surveys undertaken in 2016 as our baseline.

The first part of the report focuses on the trend data from the G20, looking primarily at the average of the results from respondents from across all 19 member states – usually referred to in the text as the 'global mean' – with additional trend data from individual countries included to provide further insight where appropriate.

While previous iterations of the soft power survey focused on the G20 member states, in 2020 we expanded the number of countries covered to a total of 36. The focus on the G20 group was originally chosen as the member states represent the UK's closest economic and cultural competitors and partners. The expansion of the survey to include additional countries increased the number of states surveyed from the EU, Indo-Pacific and the Commonwealth, as well as a small group of geopolitically important countries outside these groupings/geographies. The full list of additional countries comprised Colombia, Czech Republic, Egypt, Greece, Hungary, Ireland, Kazakhstan, Kenya, Malaysia, Nigeria, Pakistan, Poland, Romania, Singapore, Slovakia, Spain and Ukraine. This expansion of the survey allowed us to:

- look beyond the three G20 EU states of France, Germany and Italy to examine wider European attitudes towards the UK following the country's departure from the EU
- expand the scope to a broader group of Commonwealth nations
- capture data from other economically and strategically important countries outside these two blocks, i.e. Colombia, Egypt, Kazakhstan and Ukraine.

This report offers trend data for the 19 states in the G20 and provides additional insights from the inclusion of an additional 16 countries included in the 2020 survey. The data from individual states is the primary focus of part two of this report, with particular attention given to the Commonwealth, Indo-Pacific and Europe.

The scores are expressed in percentage points and accompanied where appropriate by rankings to highlight change over time. Note that this approach does bring to the fore cultural differences that affect scorings. For example, Japanese respondents tend to avoid the extremes when participating in surveys, so when given a scale of 0–10 will be more inclined to pick numbers close to the median. This should be recalled when examining the data presentation. However, by also highlighting changes in the rankings over time, we mitigate this cultural effect.

Throughout this report unless otherwise stated the data presented has been provided by Ipsos MORI (the two 2016 surveys and the 2020 survey) and GfK Social and Strategic Research (2018). The interpretation and analysis of the datasets are the author's own and do not necessarily reflect the views of the research companies that undertook the survey work on behalf of the British Council. Further detailed information on the survey questions and methodology can be found in Appendix 1 on page 47.

# Headline findings: perceptions trends from the G20 group of countries

## The appeal of wealthy liberal democracies

In 2020, for the first time in the British Council's soft power survey the UK emerged as the most attractive country in the G20 (see Figure 1 on page 8). Seventy-four per cent of respondents rated the UK between 6 and 10 out of 10 for overall attractiveness, compared to 73 per cent for Canada, thus enabling the UK to rise from fourth place in the 2018 survey to end Canada's reign at the top of the chart. See Appendix 2 on page 50 for further details on the rankings.

Policymakers in the UK will be particularly pleased to find that for overall attractiveness international perceptions of the country are now higher than they were in 2016 before the referendum on the UK's membership of the EU when the UK ranked fourth with a score of 71 per cent. This is a significant result for the UK. Many commentators might have expected the UK to have gone backwards rather than be scoring higher than five years ago. Especially given how tumultuous the period has been in UK politics. The results instead show a resilient UK well positioned to take advantage of new opportunities, especially in Commonwealth countries and the Indo-Pacific.

However, while the strengthening of the UK's position is a significant element in its success, it has only risen to first place because of the concurrent weakening in the position of its closest rivals. This is pointedly the case with both Canada, which has seen its score fall from a post-referendum high of 76 per cent (74 per cent in the pre-ref survey) to 73 per cent in 2020, and Australia (72 per cent pre-ref, 75 per cent post-ref and 71 per cent in 2020). It is notable that both Canada and Australia have lost the ground they gained following the referendum. In contrast Italy's scoring in third place has proven more stable (71 per cent pre-ref, 72 per cent post-ref and 73 per cent in 2020).

It is also worth emphasising that the averaging of the results that gives the UK its top spot disguises some significant variations in the results from individual countries. We will explore this angle further in part two of this report (see page 25) where we examine the findings in greater detail.

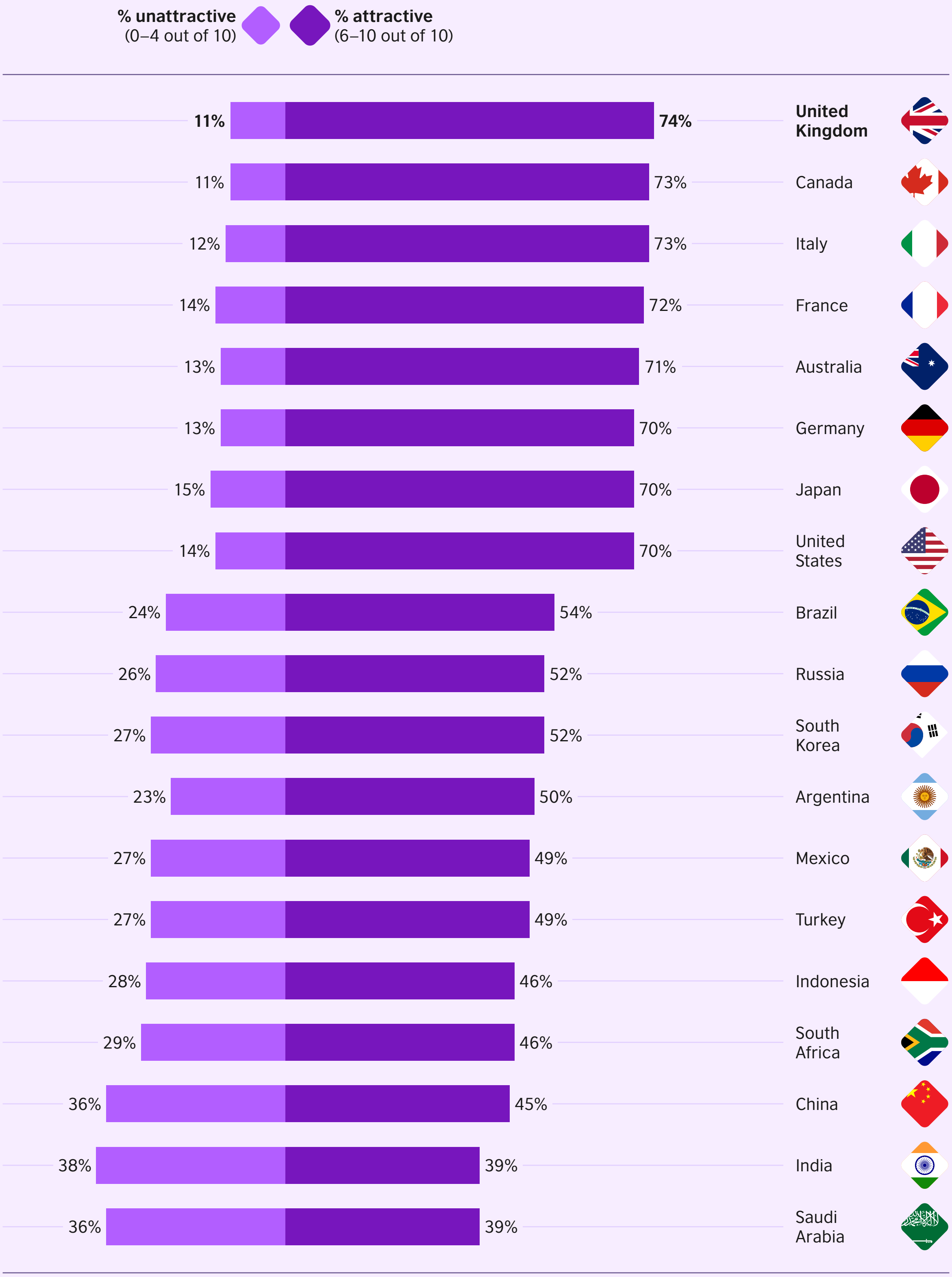
There are three main takeaways from these figures for overall attractiveness. **First** is just how small the changes in score are year on year. Changes in perceptions are generally gradual, especially when they are averaged across as large a set of countries as here.

**Second**, it is worth remarking just how close the 'soft power race' now is. Not only are the UK and Canada's scores a mere hair's breadth apart, but also the gap between the scores for first and fifth place in the rankings is just three percentage points. While the results should rightly be well received by UK policymakers, it is very much the case that the UK is first among equals. There are no guarantees that the UK will retain the top spot in subsequent surveys. Whether Canada or a third country like Germany or Japan emerges to take the crown will depend in large part on how the UK navigates the new post-EU, post-COVID-19 world of the 2020s.

**For overall attractiveness international perceptions of the UK are now higher than they were in 2016 before the referendum on the UK's membership of the EU.**

**Figure 1. G20 states and attractiveness**

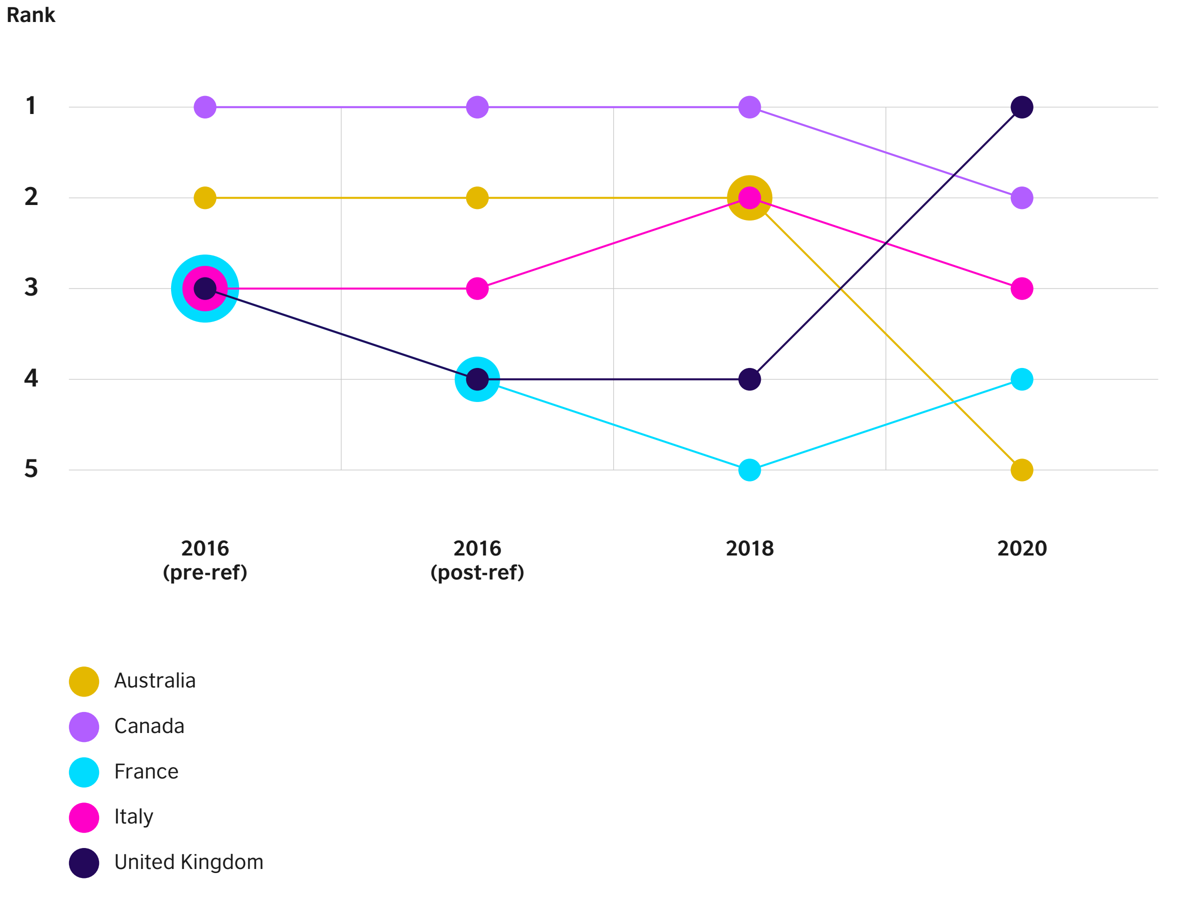
How attractive overall do you find each of the following countries?




*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

**Figure 2. The changing attractiveness rankings of the 2020 top 5 scoring states**

How attractive overall do you find each of the following countries?




*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

The **third** point to note is the continued domination of the chart by wealthy liberal democracies. We explored this dimension in 2018's *Powers of attraction*[1] report. Just as in 2016 and 2018, high-income states (as described by the World Bank) that are rated 'free' (by Freedom House) occupy the top eight places, while upper middle-income Brazil and 'not-free' Russia hold the ninth and tenth places respectively. South Korea and Saudi Arabia are the only high-income states in the lower half of the table. The remainder are all upper middle-income countries with the exception of lower middle-income India. It is not a coincidence that Indonesia, recently redesignated by the World Bank as an upper middle-income economy, has seen its score for overall attractiveness rise from 41 per cent in 2016 to 46 per cent in 2020, while India's score has declined slightly from the same as Indonesia in 2016 to 39 per cent in 2020.

**There has been a significant decline in trust in both Canada and the UK over the four-year period. France, Germany, the USA and Japan have also seen falling scores for trust.**

## Eroding trust

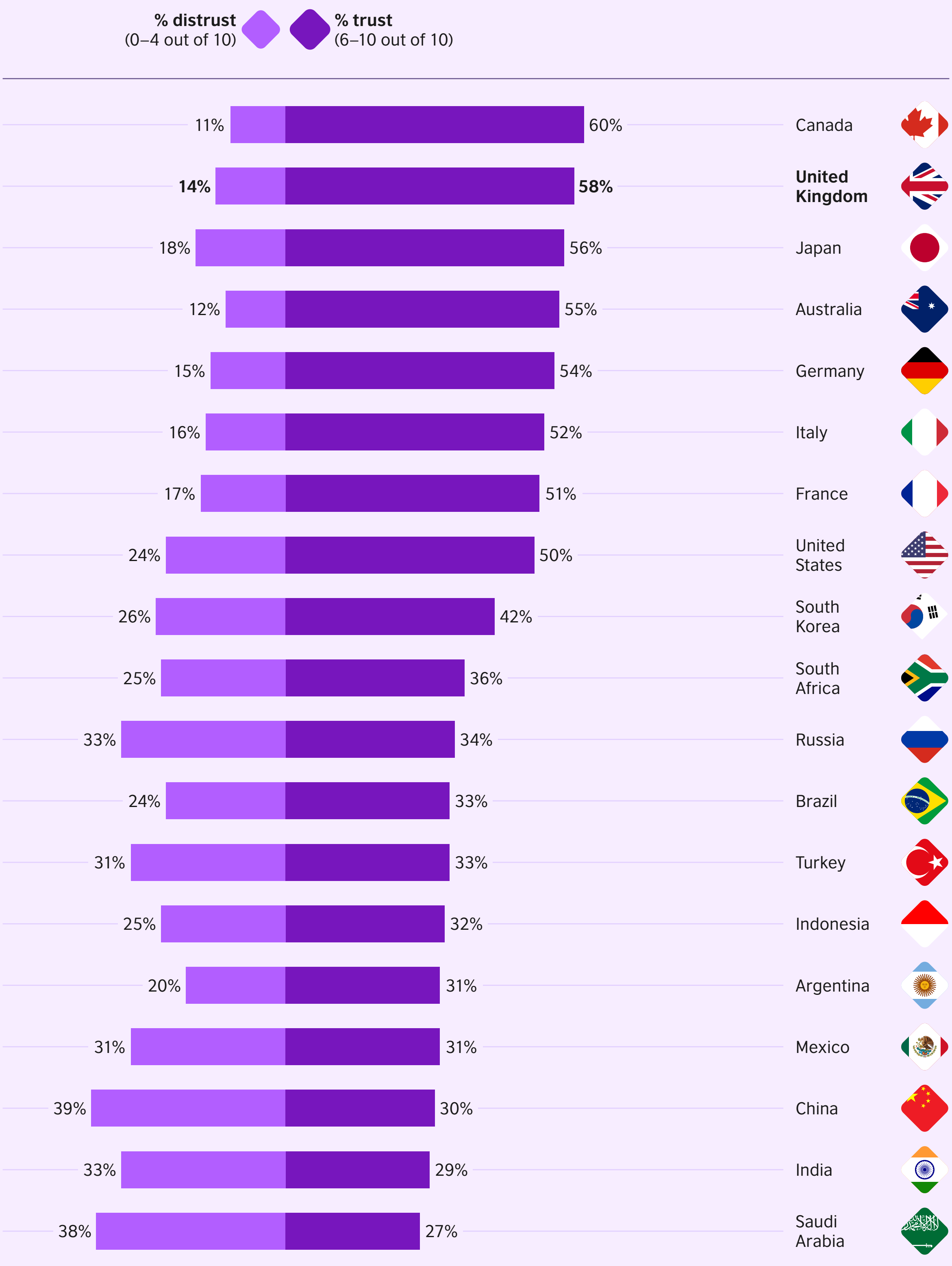
While the UK pipped Canada to the top spot for overall attractiveness, Canada remains top across all three of our trust metrics: trust in people (60 per cent with the UK second on 58 per cent and Japan third on 56 per cent), trust in government (54 per cent, with Germany second on 49 per cent and the UK third on 48 per cent) and trust in institutions (56 per cent, equal first with the UK, with Germany taking third on 54 per cent). The full results can be found in Figures 3–5 on pages 11–13. This is again a noticeable improvement in the rankings for the UK on previous years (see Figures 6–8 on pages 14–16). After the EU referendum the UK was fourth for trust in people and trust in government and second for trust in institutions. See Appendix 2 on page 50 for further details on the rankings.

Yet as superficially flattering as the results are for British (and Canadian) policymakers, this is not the most important finding from the data. It is worth noting the scores in 2016. In the pre-referendum survey Canada was top, scoring 66 per cent for trust in people and 61 per cent for both trust in government and institutions, while the UK received respectively 62 per cent, 55 per cent and 59 per cent for these three metrics. Clearly there has been a significant decline in trust in both Canada and the UK between the pre-ref and 2020 surveys. France, Germany, the USA and Japan have also seen falling scores for trust. Further down the rankings, i.e. where trust was already lower, scores seem to be more stable.

1. British Council (2018) *Powers of attraction*. Available online at: www.britishcouncil.org/sites/default/files/j136_thought_leadership_g20_perceptions_196x284mm_final_web_v3.pdf (accessed 14 May 2021).

**Figure 3. Trust in people by country**

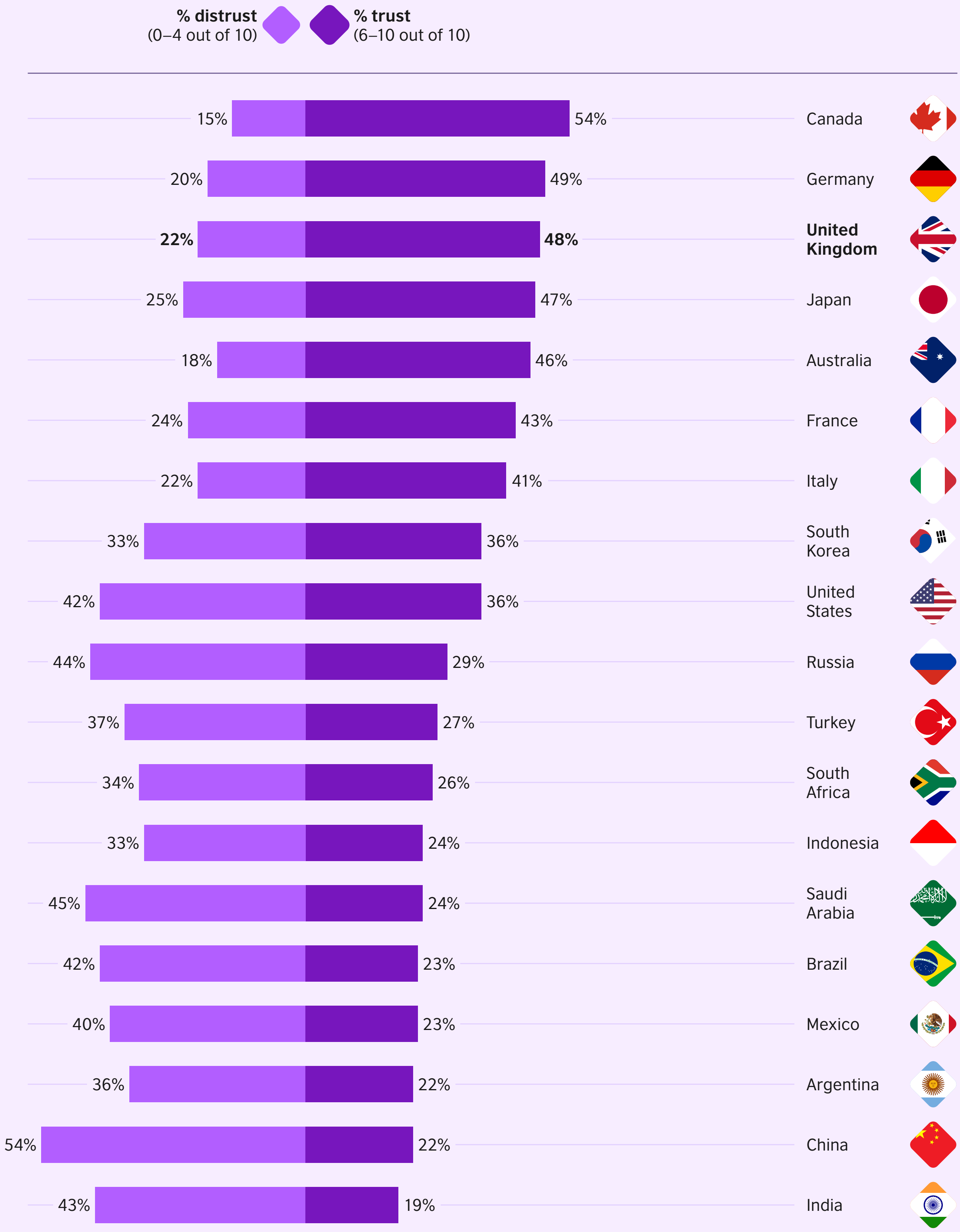
Thinking generally about people, to what extent do you distrust or trust people from each of the following countries?




*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

**Figure 4. Trust in government by country**

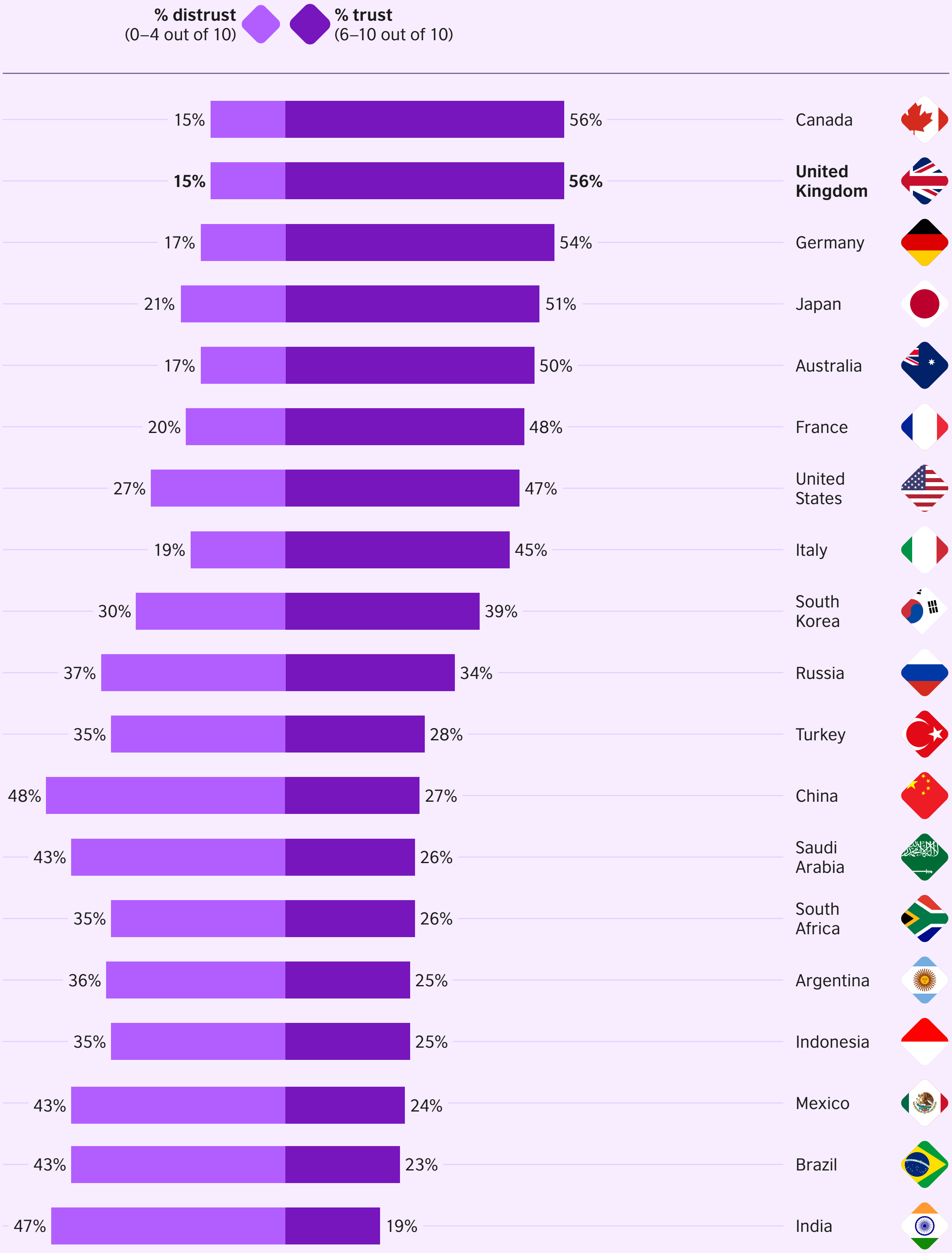
Thinking generally about government, to what extent do you distrust or trust the government from each of the following countries?




*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

**Figure 5. Trust in institutions by country**

Thinking generally about institutions (such as the media, police, or justice system), to what extent do you distrust or trust the institutions in each of the following countries?

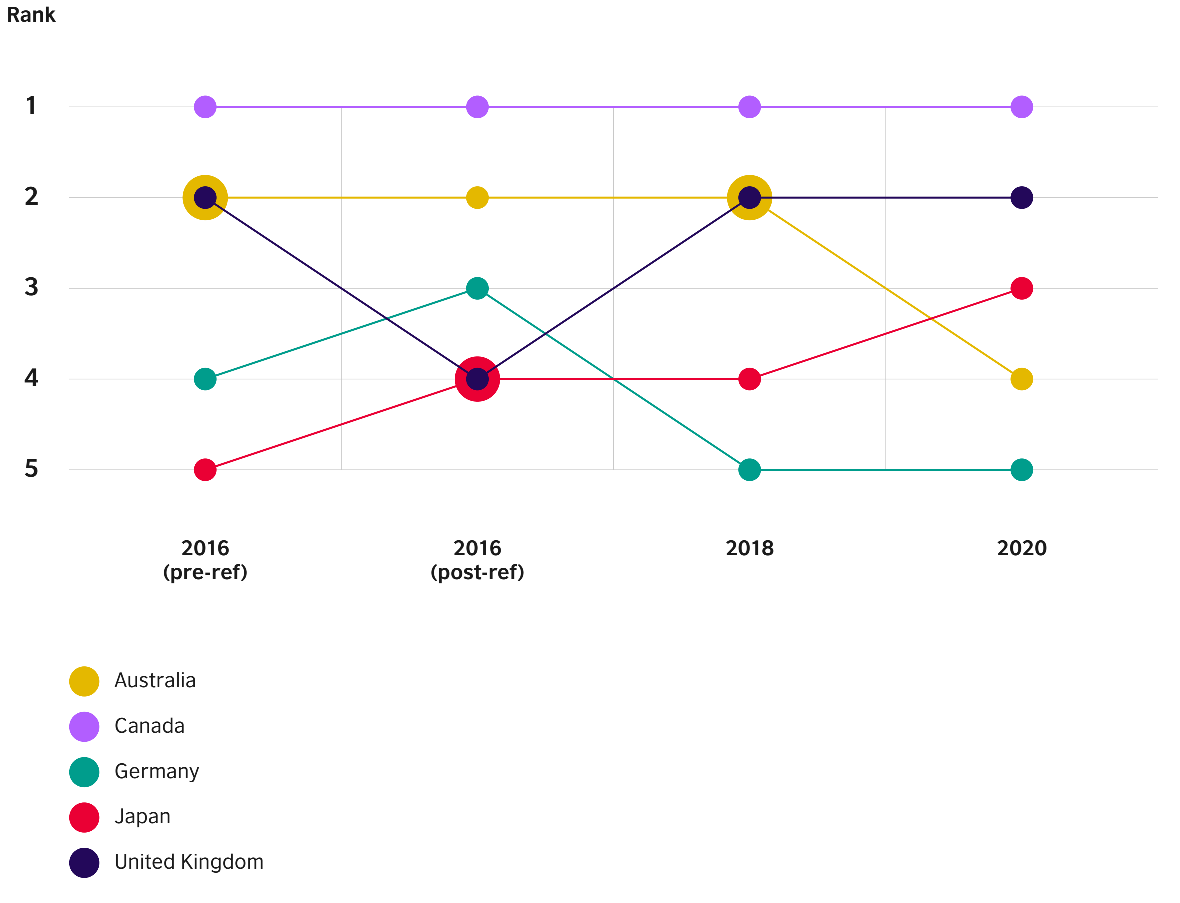



*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

**Figure 6. The changing rankings for trust in people of the 2020 top 5 scoring states**

Thinking generally about people, to what extent do you distrust or trust people from each of the following countries?

G20 countries shown only since all other countries new for 2020 so no trend data available. See Appendix 2 on page 51 for the full G20 rankings.

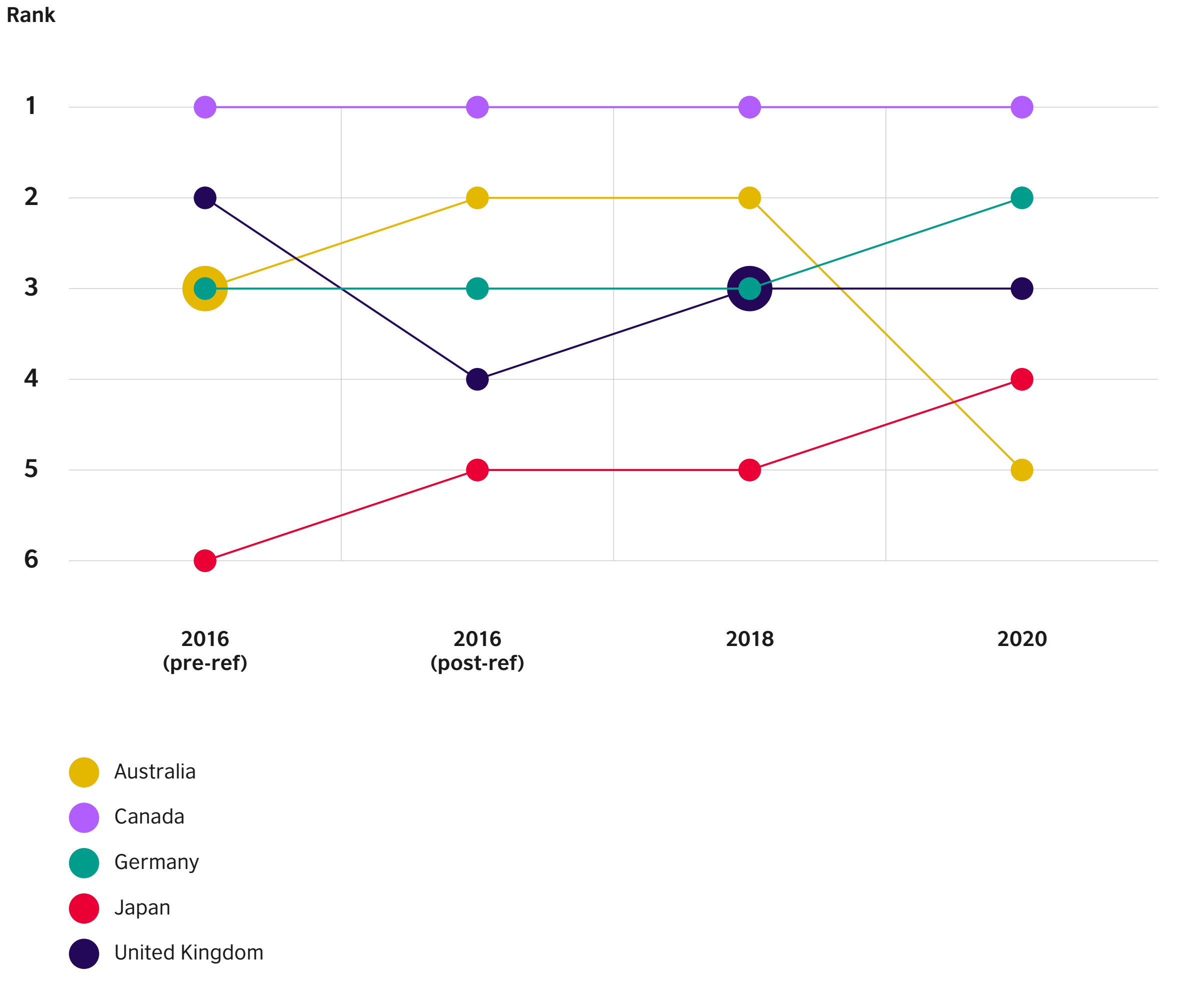



*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

**Figure 7. The changing rankings for trust in government of the 2020 top 5 scoring states**

Thinking generally about government, to what extent do you distrust or trust the government from each of the following countries?

G20 countries shown only since all other countries new for 2020 so no trend data available.
See Appendix 2 on page 52 for the full G20 rankings.

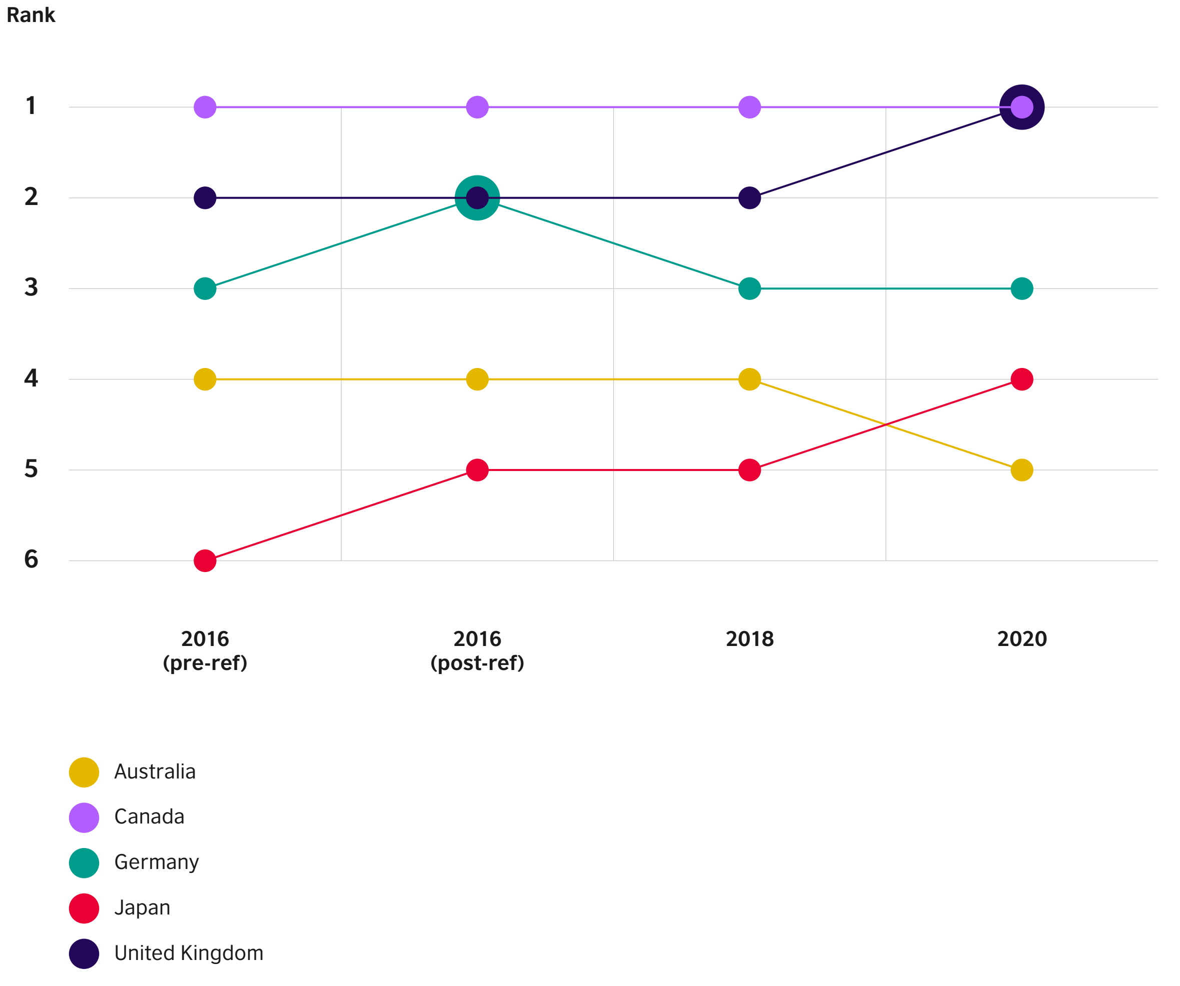



*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

**Figure 8. The changing rankings for trust in institutions of the 2020 top 5 scoring states**

Thinking generally about institutions (such as the media, police, or justice system), to what extent do you distrust or trust the institutions in each of the following countries?

G20 countries shown only since all other countries new for 2020 so no trend data available. See Appendix 2 on page 53 for the full G20 rankings.




*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

What explains falling levels of trust? COVID-19 is likely an immediate factor in the results for 2020. Multiple forces and actors (both state and non-state) that sow political division between and within nations are another factor. However, these states arguably carry their own share of responsibility for this state of affairs given their collective failure to address shared global challenges despite the resources available to them. Simply put they must try harder to act – and be seen to act – with integrity and in co-operation with other states, and eschew the petty posturing, disunity and provocations that have marked the past few years.

The erosion of international trust should be of concern to policymakers around the world. Trust is vital to the conduct of international relations. It plays a critical role in complex multi-national, multi-partner engagements. The absence of trust deters business and investment and encourages protectionism, undermining the essential economic drivers of global prosperity. It makes it much harder to agree to the kind of collective voluntary action that underpinned the Paris Accords and is essential to the ongoing global campaign against COVID-19. Agreeing new targets at the UN Climate Change Conference (COP26) and reopening closed borders to travellers and commerce as we recover from COVID-19 both rely on governments trusting one another to act transparently and meet their obligations. Public trust in government is also vital; people need to trust what they are told if they are to support global action.

Trust also has serious implications for global security. States that trust one another rarely end up at war, even where there are serious disputes, because governments that trust one another can resolve their differences through diplomacy. Where tensions are heightened it is the states that distrust one another that struggle to de-escalate conflict and that are most prone to potentially catastrophic miscalculation.

## Attractiveness, trust and values

It is no accident that the G20 countries that are seen as the most trusted are also the most attractive overall. There is a powerful relationship between trust, values and attractiveness. While having the 'best stuff' – whether that's the food, weather, heritage, landscapes, universities, arts, brands or indeed Martian helicopters – matters to attractiveness, so too do the personal freedoms, diversity and respect that are identified with open societies and liberal democracies.

There is a convergence between attractiveness, trust and values. Hard power can result in attractiveness – the world's three biggest economies are the most attractive places to do business regardless of other factors. Yet the countries that score highest for overall attractiveness are not only wealthy but also perceived as trustworthy, stable, open, free and fair – they are liberal, capitalist democracies. These are the places that celebrate difference and where individual freedoms are safe from state interference, where the people have a voice and the ruling elites must pay heed to their views.

Democracy is seen to be in retreat globally, with Freedom House's *Freedom in the World 2021* [2] declaring:

> As a lethal pandemic, economic and physical insecurity, and violent conflict ravaged the world, democracy's defenders sustained heavy new losses in their struggle against authoritarian foes, shifting the international balance in favor of tyranny ...

And yet liberal, prosperous, open, democratic societies remain very much what young people find attractive, because it is what they aspire to for themselves and their own countries. Even with such a divisive issue as Brexit, the fact the UK government entrusted the people to make a decision on such a fundamental question and (eventually) delivered on the outcome is, for many people around the world, both novel and inspiring.

If authoritarian states seem to be on the front foot after the halcyon days of the late 1980s and 1990s where the liberal, capitalist model seemed to have won and history had supposedly ended, the response should not be defeatism. It should be a renewed effort to bring hope and inspire courage through the unity of like-minded liberal democracies acting collectively to build a better future for the world. The fundamental things people want and value have not changed, even if the outward trappings of capitalism's success have moved on from the Sony Walkman to the iPhone.

The UK can achieve much by working together with like-minded, liberal, democratic countries. It must also work constructively with countries that are neither liberal nor democratic, especially those who sit alongside it on the UN Security Council. The UK cannot limit its international relations to countries that Freedom House judges 'free'. The partly frees and not-frees share the same small blue planet even if the values of these authoritarian and/or socially conservative states diverge from those of the UK.

2. Freedom House (2021) *Freedom in the World 2021: Democracy Under Siege.* Available online at: freedomhouse.org/report/freedom-world/2021/democracy-under-siege (accessed on 14 May 2021).

The sometimes-sharp differences of opinion on geopolitical issues and/or in societal attitudes to, for example, LGBTQIA+ rights do not preclude co-operation on areas of shared interest.

One of the most interesting findings in the soft power survey is the remarkable convergence in the priorities of young people around the world. Almost all see climate change/the environment and poverty as the most critically important challenges facing the world today (see Figure 9 on page 19). There is a real opportunity for the UK to build a role as an international convener, bringing together parties that might hold quite divergent views to make common cause against global threats and challenges like climate change and international development.

The UK enjoys the respect and trust of peoples from very different cultures. It is seen as supporting and encouraging the values young people around the world think are the most important in the 21st century (see Figure 10 on page 20). Even the countries the UK government judges to be strategic rivals and adversaries view the country with respect and afford it levels of trust that they themselves envy – and seek to emulate. The UK's soft power advantage, being seen as a force for good in the world, leaves it well placed to build alliances. It is able to bring together states that may not share the exact same set of values but who trust the UK in a way that they do not trust other global powers.

**There is a real opportunity for the UK to build a role as an international convener, bringing together parties that might hold quite divergent views to make common cause …**

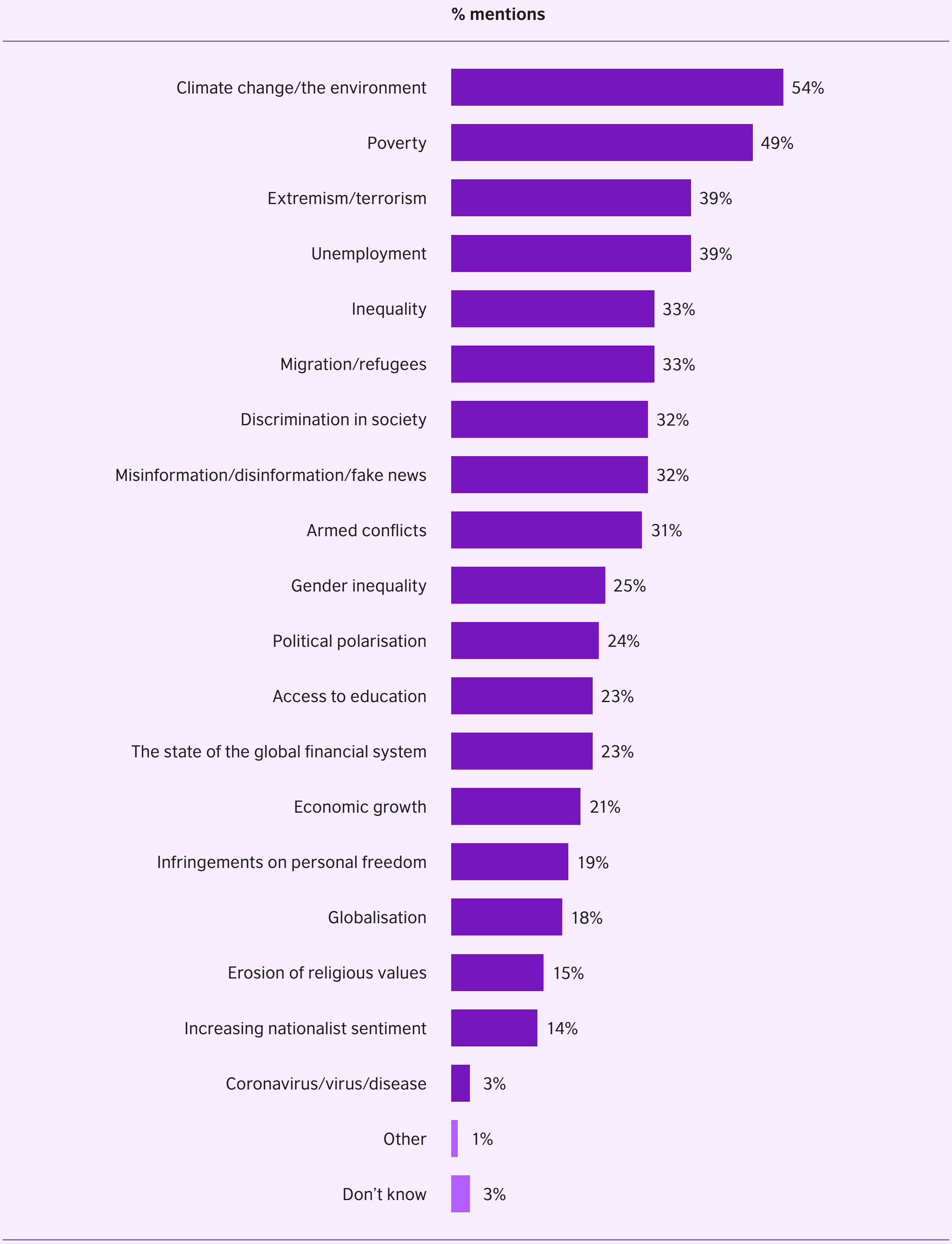
## COVID-19: China, Italy and pandemic diplomacy

One of the most dramatic changes in the rankings in the 2020 survey is China's fall of six places for overall attractiveness from 11th, which it held in both 2016 and 2018, to 17th. However, the change in rankings is somewhat deceptive. China's actual score is static – in early 2016 46 per cent of respondents ranked China between 6 and 10 for overall attractiveness compared to 45 per cent in 2020. Rather than a precipitous decline in perceptions, the fall in rank actually reflects increases in the scores of other upper middle-income countries, including Indonesia, Mexico, South Africa and Turkey, all of whom have overtaken China's scoring. Turkey, for example, saw its score for overall attractiveness rise from 42 per cent in the pre-ref survey to 49 per cent in 2020.

However, while China's scoring for overall attractiveness is essentially unchanged, there has been a significant decline in China's results for trust, especially for trust in government. In 2016 China scored 30 per cent on this metric but in 2020 this had fallen to 22 per cent. Perhaps more notable is the flipside of this slide in perceptions, the dramatic increase in levels of distrust. In 2016 43 per cent said they distrusted the Chinese government whereas in 2020 the figure was 54 per cent, making the Chinese government the most distrusted in the G20, ahead of Russia, Saudi Arabia and 2018's 'winner' on this metric, the USA. By way of comparison the corresponding figure for distrust in the UK government was 22 per cent, while for Canada the score was just 15 per cent.

**Figure 9. Issues the world is facing**

Which, if any, of these do you think are the most important issues facing the world today?

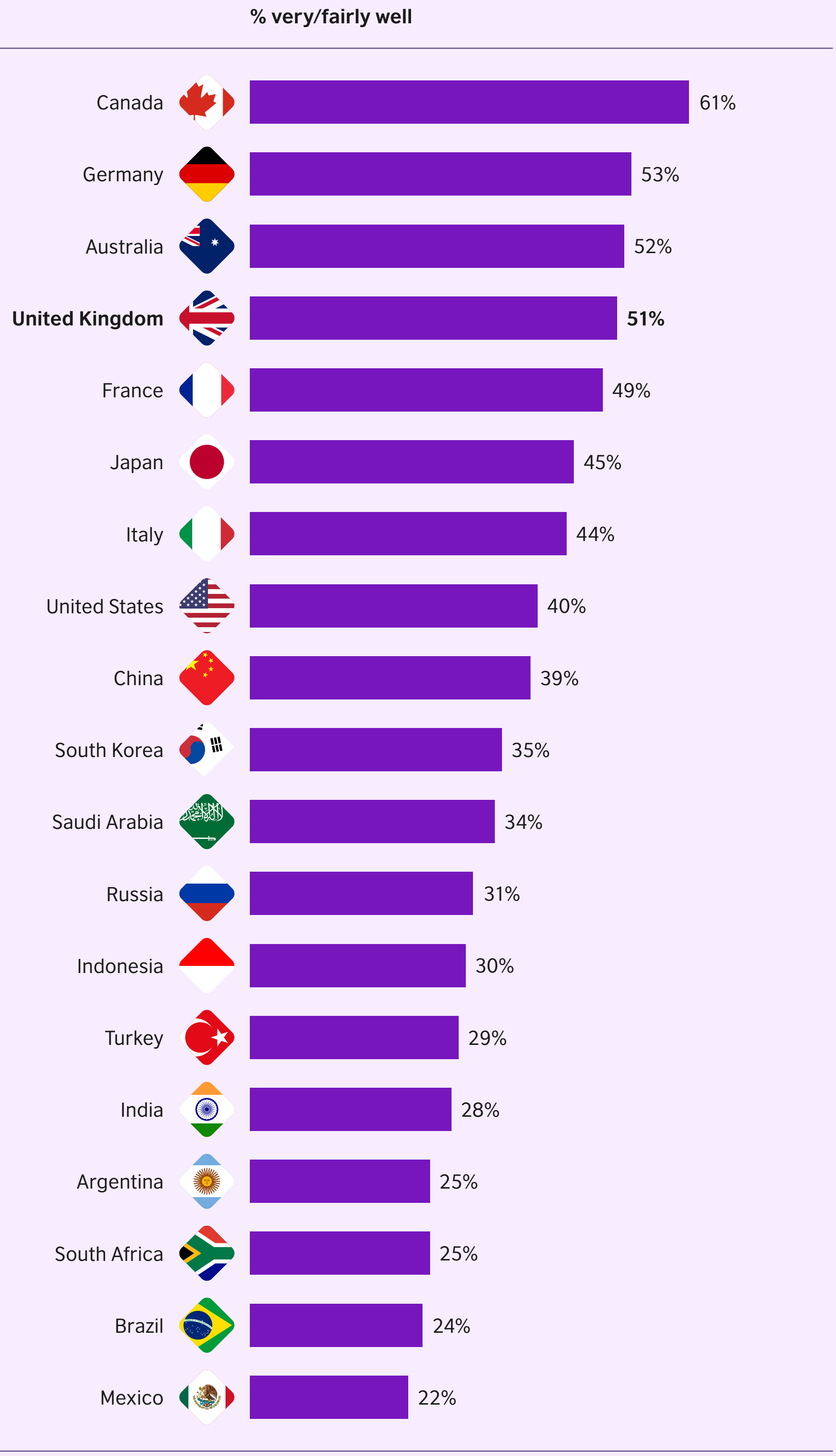



*Base: All participants in the G20 [20,612]*

### Figure 10. Values the world should support and encourage

Thinking about both your own country and the other countries listed below, how well do you think they support and encourage the values you think are important in the 21st century?

Respondents asked about G20 countries only.




*Base: All participants in the G20 [20,612]*

With the fieldwork taking place in February and March 2020, just as the COVID-19 pandemic spread across the globe, the scoring for China may well reflect the impact on perceptions of the initial outbreak in Wuhan and the realisation that the virus was a global threat. Other surveys have also shown sharp declines in perceptions of China in the past year. For example, the Pew Research Center[3] released survey data in October 2020 showing sharp rises in negative evaluations in multiple countries. In some quarters the change has been truly dramatic. Reflecting the heightened tensions between the two countries, fully 81 per cent of Australian respondents to the Pew survey had an unfavourable view of China, up 24 percentage points on 2019, while the figures from the UK saw 71 per cent taking a negative view, up 19 points on the preceding year.

However, the pandemic appears to have had a very different impact on perceptions of China in Italy. Bucking the global trend, China came sixth out of the G20 states for overall attractiveness in Italy, a rise of four places on 2018. Only one other country saw a rise in China's ranking – in Brazil, China rose four places to rank ninth. The fieldwork in Italy took place at the height of the country's COVID-19 crisis with overwhelmed hospitals forced to resort to triage and the imposition of Europe's first national lockdown. At this time of acute national crisis, China sent doctors and vital medical supplies. That humanitarian assistance, offered to the Italian people at a point of national emergency, apparently resulted in a profound shift in public opinion in the country.

In Italy the figures for trust in people for China are much more positive than the G20 average at 57 per cent for trust and 18 per cent distrust (compared to the average scores of 30 per cent and 39 per cent respectively). Italians trust the people of China almost as much as they do people from the UK (63 per cent trust and 14 per cent distrust) and the USA (59 per cent/14 per cent); and trust them significantly more than they do the peoples of fellow EU states Germany (51 per cent/24 per cent) and France (43 per cent/25 per cent). Interestingly, however, the 2020 results from Italy on trust in the Chinese government track much closer to the G20 average (29 per cent trust and 50 per cent distrust), suggesting perhaps that it is the people of China and not the CCP that has been the net beneficiary of China's humanitarian intervention.

Evidently something very interesting is happening in Italy. The data from the soft power survey fits with a pattern – the Pew study cited above also found significantly higher scores for favourability in Italy compared to other states. Further light is shed by a separate 2020 survey released by Pollster SWG[4] that revealed 52 per cent of Italians surveyed considered China a friendly country, a massive 42 percentage point leap compared with 2019. Meanwhile only 17 per cent of respondents considered the USA a friendly country, down from 29 per cent the previous year. Perhaps more shockingly, the SWG survey also found that 45 per cent of Italians surveyed considered Germany a 'hostile country', with 38 per cent considering France an enemy and 17 per cent seeing the UK that way.

However, while COVID-19 has clearly played a role in these findings other factors may also be in play. For example, Italy is the only G7 state so far to have embraced China's Belt and Road Initiative (BRI), joining long before anyone had heard of COVID-19. Whatever the causes, the friendship between the peoples of China and Italy, and the concurrent decline in young Italians' attitudes towards fellow EU states, is one to watch. What we do not yet know is whether the changes in perceptions of China we have seen in Italy and other states over the past year will prove transitory or mark a lasting shift.

The increased assertiveness of the Chinese government internationally predates COVID-19, as evidenced by the vast investment in the BRI over the last few years. China's increasingly important role in supporting global development, poverty eradication and action on climate change has been having a significant impact around the world, increasing China's global presence and influence.

3. Pew Research Center Global Attitudes and Trends (2020) *Unfavorable Views of China Reach Historic Highs in Many Countries: Majorities say China has handled COVID-19 outbreak poorly.* Available online at: www.pewresearch.org/global/2020/10/06/unfavorable-views-of-china-reach-historic-highs-in-many-countries/ (accessed 14 May 2021).

4. Foreign Policy (2020) *Forget Washington and Beijing. These Days Global Leadership Comes From Berlin.* Available online at: foreignpolicy.com/2020/04/28/global-leadership-coronavirus-pandemic-germany-united-states-china/ (accessed 14 May 2021).

Following international dismay at the emergence of COVID-19, the Chinese government has ramped up its global efforts. In some cases, as can be seen most clearly in Italy, this 'COVID-19 Support Diplomacy' has been effective at improving opinions. However, as the data on trust and attractiveness reveals, elsewhere China's more assertive approach, what some commentators refer to as 'Wolf Warrior Diplomacy',[5] has appeared to prove a less winning formula and in fact may have undermined China's soft power.

It cannot be doubted that the Chinese government understands the challenges it faces in terms of international perceptions and trust. The evidence from Italy shows that, with opportunity and the right mix of policies and an effective campaign, it is possible for China, and for that matter other activist states, to quickly build trust and attractiveness. It will be very interesting to see what impact China's vaccine programme has on perceptions.

The main lessons from Italy are that kindness, selflessness and supporting others in times of trouble builds attraction and trust. The UK would do well to note this example and consider the risks to the UK's international reputation of even a temporary reduction in its aid budget.

More generally countries' handling of the COVID-19 crisis is likely to have significant implications for how they will score in the next iteration of the survey. Looking specifically at the UK, the fieldwork for the 2020 survey pre-dated the start of the first UK lockdown, so we cannot draw data from it on the UK's response to COVID-19.

However, a separate, informal survey undertaken by the British Council in the summer of 2020 of participants in its Future Leaders Connect[6] programme does offer some insight. It found a split in opinion with young people from high-income Western countries generally taking a dim view of the UK's initial efforts compared to places like Germany and Taiwan. People from middle- and low-income countries, however, tended instead to view the UK as handling the crisis well. Subsequent events, particularly the spectacular success of the UK's vaccine scheme, the contrasting response of the EU and talk of 'vaccine wars' will likely further colour perceptions.

What will have had the most cut through with young people internationally, the number of 'deaths with COVID-19' or the world-beating pace of vaccination? Barring further problems like the emergence of a new vaccine-resistant strain of the virus, there are reasons to be cautiously optimistic that the internationally recognised success of the UK vaccine programme and the subsequent reopening of the economy well ahead of other states will be to the UK's benefit in the medium and long term.

**Italians trust the people of China almost as much as they do people from the UK and the USA, and trust them significantly more than they do the peoples from fellow EU states Germany and France.**

5. The Diplomat (2020) *Interpreting China's 'Wolf-Warrior Diplomacy': What explains the sharper tone to China's overseas conduct recently?* Available online at: thediplomat.com/2020/05/interpreting-chinas-wolf-warrior-diplomacy/ (accessed 14 May).

6. Future Leaders Connect is the British Council's long-term global network of emerging policy leaders. Members from more than 13 countries are working to make substantial change through policymaking, campaigns and leadership to tackle some of the most pressing challenges we face today. For more information please visit the British Council website: www.britishcouncil.org/future-leaders-connect (accessed 14 May 2021).

## The USA: disunited but still the essential country

Perhaps the single most shocking finding in the 2018 survey was the emergence of the US government as the most distrusted in the G20. While American policymakers might take heart from the USA's relative improvement on the dismal results in 2018, distrust in the US government remains historically high at 42 per cent. And, as we have seen above, with a score of 36 per cent for trust, the USA also lags far behind the other anglophone democracies. Back in early 2016 these scores were 47 per cent trust and 29 per cent distrust, so there has been a sharp reversal in perceptions here.

However, this does seem to be particular to perceptions of the US government. It is worth noting that trust in the American people and US institutions has been stable over the four-year period. In 2016 the score for trust in people was 51 per cent and in 2020 it was 50 per cent, while for trust in institutions the respective scores were 49 per cent and 47 per cent. Given the general decline in trust over the period these figures hold up very well.

It would be easy to blame the Trump administration for the sharp decline in trust in the US government. However, that would be a mistake – the negative trends predate the 2016 election. While the policies and rhetoric of 'America First' have had a negative impact on perceptions, a whole host of other societal and political factors, some domestic, some international, have all contributed to falling levels of trust in the US government. Political polarisation, gun crime and racial discrimination are all likely contributors.

It is also important to recognise that the downward trend dates back to at least the Obama administration and likely earlier. The Iraq War and Hurricane Katrina both damaged the standing of the US government with international audiences. Katrina in particular shocked people around the world as it shattered perceptions of the capability and competence of the world's most powerful government, while at the same time revealing the high levels of inequality which usually remain well hidden behind the glitz and glamour of Hollywood and the Big Apple.

Only time will tell if the Biden administration will be able to reverse the negative trend and restore confidence in the US government internationally.

There is an interesting contrast to the story of falling trust in the US government. For overall attractiveness the USA has actually improved upon its position in 2018, rising from eighth to sixth. Further, like the UK, the score is also slightly higher than it was in 2016 (70 per cent in 2020 compared to 67 per cent in early 2016). While there will be some all too eager to place the blame on the Trump administration for falling levels of trust, it is far less likely that they would credit it with improving the USA's international standing on overall attractiveness.

The data can only tell us so much, but what we can be sure of is the enduring appeal of the USA's soft power assets. This can be seen in our four detailed attractiveness metrics. The USA maintains its top spot as the most attractive country in the G20 as a place to study (53 per cent), to do business/trade (52 per cent) and to visit (33 per cent). It seems COVID-19 hasn't dimmed the international appeal of either an Ivy League education or Disney World, even if it has deterred travel plans in the short term. The one metric in this subset where the USA is not first is the 'country most attractive as a source of arts and culture', where it is fourth (27 per cent).

The UK also performs relatively well on these metrics.

- It is the second most attractive place for study (40 per cent), with Canada third (29 per cent).
- It ranks fourth as a place to do business/trade (23 per cent), behind the world's three biggest economies (with China second on 32 per cent and Japan third on 27 per cent) but ahead of other countries with similar-sized GDP like Germany (21 per cent) and France (11 per cent).
- It is equal fifth for tourism with Australia (22 per cent), behind the USA, Italy (31 per cent), Japan (29 per cent) and France (28 per cent).
- It is also fifth for the culture metric (24 per cent). France is first on this metric (36 per cent), closely followed by Italy (35 per cent), with Japan third (31 per cent).

**The UK is the second most attractive place for study, ranks fourth as a place to do business/trade, fifth for tourism and fifth for culture.**

The continuing dominance of the USA across these metrics is a testament to the enduring strength of the soft power of the USA – whoever is in the White House. The same applies to the UK. Both countries benefit enormously from their status as soft power superpowers, with the impacts measurable in terms of FDI, trade volumes, tourism, science and research, and international student enrolments. That advantage is not, though, guaranteed, as the rapid decline in trust in the US government clearly shows, but it does provide a powerful platform on which to build if the will is there to make the necessary investment and policy changes.

The experiences of China, the USA, Canada and the UK offer profound lessons for policymakers around the world. Attraction and trust are not guaranteed. Normally, any changes in perceptions happen incrementally over time, perhaps rising and falling with fashion as much as policy. Interest might peak for a Cool Britannia or London 2012 followed by a lull before the next New Wave – or Dua Lipa – breaks. But the policies and rhetoric of governments matter.

Four years of President Trump have had a significant impact on perceptions of the USA. Certainly, other factors have had an effect, but given the unprecedented level of international interest in every 6 a.m. tweet emanating from Mar-a-Lago, 'the Southern White House', let alone the actual policies of the administration, the paramount importance government can play in international perceptions of a country is clear.

Governments can undermine their country's soft power, sometimes wiping out years of accumulated trust and amity with a simple signature on an Executive Order – or an ill-judged comment. By the same measure, they can also intervene to positively enhance perceptions. While some of the Chinese government's recent actions have had a negative impact on perceptions, the humanitarian intervention in Italy offers an example of how states can make a difference by showing generosity and solidarity with others.

We know from past analysis of the soft power survey just how important such actions are. Analysis presented in the *Sources of soft power*[7] report demonstrated that supporting those in need is one of the strongest drivers of trust in both government and people, a finding confirmed by the data from Italy. This is why short-sighted 'vaccine wars' are so counterproductive. Trust depends on reliability, openness and generosity. Those that share what they have and work collectively towards the common good will see their stock rise.

The lesson for the UK government is clear: if the UK is to retain its top spot in the rankings of the world's soft power superpowers, it must act, and be seen to act, as a force for good in the world.

7. British Council (2020) *Sources of soft power.* Available online at: www.britishcouncil.org/sites/default/files/sources-soft-power-report-perceptions-success.pdf (accessed 14 May 2021).

# Britain's global future: findings from across the 36 survey countries

## The UK is first among equals

So far we have focused on the headline findings from the soft power survey, in particular on the trend data from the G20 states we have been surveying over the past five years. We will now look in more detail at the results from individual country surveys, including from the 17 countries included for the first time in the 2020 survey.

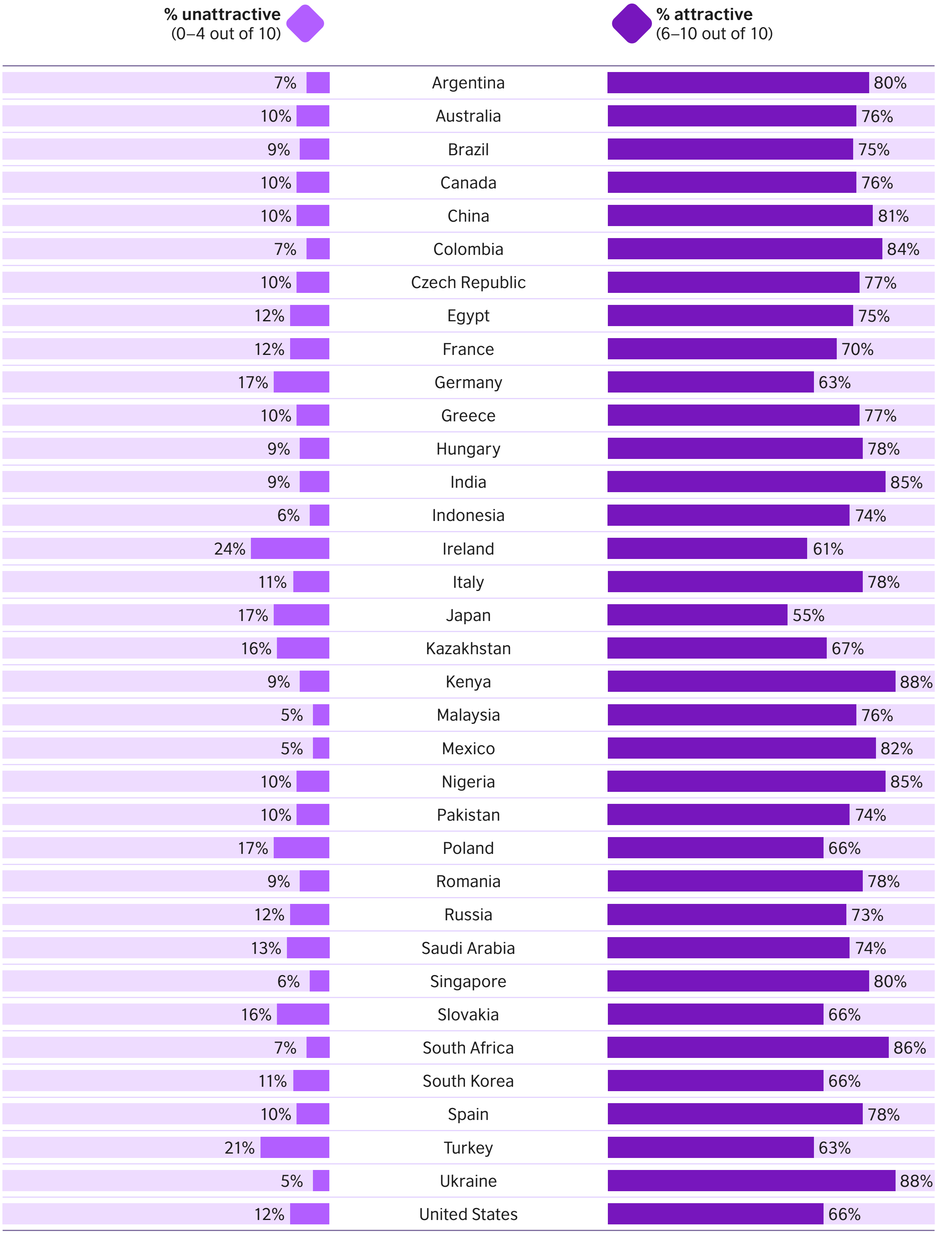
First, it is important to note that, as well as averaging first for overall attractiveness across the G20, the UK remains in first place when we look at the average of the results from all 36 countries surveyed. However, when we look in more detail at the rankings from the individual states a more complicated picture emerges. See Figure 11 on 26 for the full set of scores for the UK for overall attractiveness from the other 35 countries surveyed. Table 1 on page 27 shows how the UK's ranks for overall attractiveness and the three trust metrics have changed over time in the G20.

The UK is actually first for overall attractiveness in just five countries: Kenya (where 88 per cent of respondents scored the UK between 6 and 10 out of 10 for overall attractiveness), Nigeria (85 per cent), Saudi Arabia (74 per cent), South Africa (86 per cent) and Ukraine (88 per cent). It is second in Australia (76 per cent), Canada (76 per cent), China (81 per cent), Hungary (78 per cent), India (85 per cent) and Kazakhstan (67 per cent). There appears to be a clear affinity for the UK in Commonwealth countries, with Malaysians giving the UK its only third-place ranking (76 per cent) and Pakistani and Singaporean respondents placing the UK fourth (74 per cent and 80 per cent respectively). It is notable that the USA also ranks the UK fourth (66 per cent), while in Egypt it is fifth (75 per cent). The data demonstrates the enduring strength of a wider 'Anglophonie' beyond the formal Commonwealth.

It is a similar picture for trust. The UK again averages second overall across the three trust metrics for the 36 countries. However, the picture again becomes more complex when we drill down into the datasets from individual countries (see Figures 12–14 on pages 28–30 for full details). The UK performs strongly in anglophone countries. It is first across all three trust metrics in Nigeria (trust in people 63 per cent, trust in government 65 per cent and trust in institutions 73 per cent) and South Africa (66 per cent, 62 per cent and 68 per cent). It performs very well elsewhere in the Anglosphere, though the rankings for trust are below the global average in Pakistan.

**The UK is actually first for overall attractiveness in just five countries: Kenya, Nigeria, Saudi Arabia, South Africa and Ukraine.**

**Figure 11. The UK's scores for overall attractiveness from 35 countries**




*Base: All participants except the UK [34,550]*

**Table 1. Changes in the UK's rankings for trust and attractiveness across G20 states between 2016 and 2020**

**Trust in people**

| | 2016 (pre) | 2016 (post) | 2018 | **2020** |
|---|---|---|---|---|
| **G20 average** | **2** | **4** | **2** | **2** |
| Argentina | 7 | 7 | 7 | **4** |
| Australia | 2 | 2 | 2 | **1** |
| Brazil | 6 | 7 | 3 | **5** |
| Canada | 2 | 2 | 2 | **2** |
| China | 5 | 2 | 3 | **3** |
| France | 4 | 3 | 3 | **2** |
| Germany | 2 | 3 | 3 | **3** |
| India | 1 | 1 | 2 | **2** |
| Indonesia | 2 | 2 | 2 | **5** |
| Italy | 3 | 5 | 3 | **4** |
| Japan | 4 | 4 | 4 | **2** |
| Mexico | 5 | 6 | 5 | **3** |
| Russia | 7 | 7 | 7 | **4** |
| Saudi Arabia | 5 | 9 | 8 | **2** |
| South Africa | 1 | 2 | 2 | **1** |
| South Korea | 3 | 3 | 3 | **4** |
| Turkey | 7 | 8 | 8 | **6** |
| United States | 3 | 2 | 4 | **2** |

**Trust in government**

| | 2016 (pre) | 2016 (post) | 2018 | **2020** |
|---|---|---|---|---|
| **G20 average** | **2** | **4** | **3** | **3** |
| Argentina | 7 | 6 | 7 | **5** |
| Australia | 2 | 2 | 2 | **3** |
| Brazil | 5 | 6 | 4 | **3** |
| Canada | 2 | 2 | 2 | **1** |
| China | 4 | 3 | 2 | **2** |
| France | 3 | 4 | 3 | **3** |
| Germany | 3 | 4 | 4 | **4** |
| India | 2 | 1 | 3 | **1** |
| Indonesia | 2 | 2 | 2 | **4** |
| Italy | 3 | 4 | 4 | **5** |
| Japan | 4 | 3 | 4 | **1** |
| Mexico | 3 | 4 | 5 | **5** |
| Russia | 6 | 5 | 9 | **4** |
| Saudi Arabia | 3 | 5 | 5 | **2** |
| South Africa | 2 | 3 | 3 | **1** |
| South Korea | 4 | 4 | 3 | **4** |
| Turkey | 6 | 7 | 6 | **6** |
| United States | 3 | 2 | 3 | **2** |

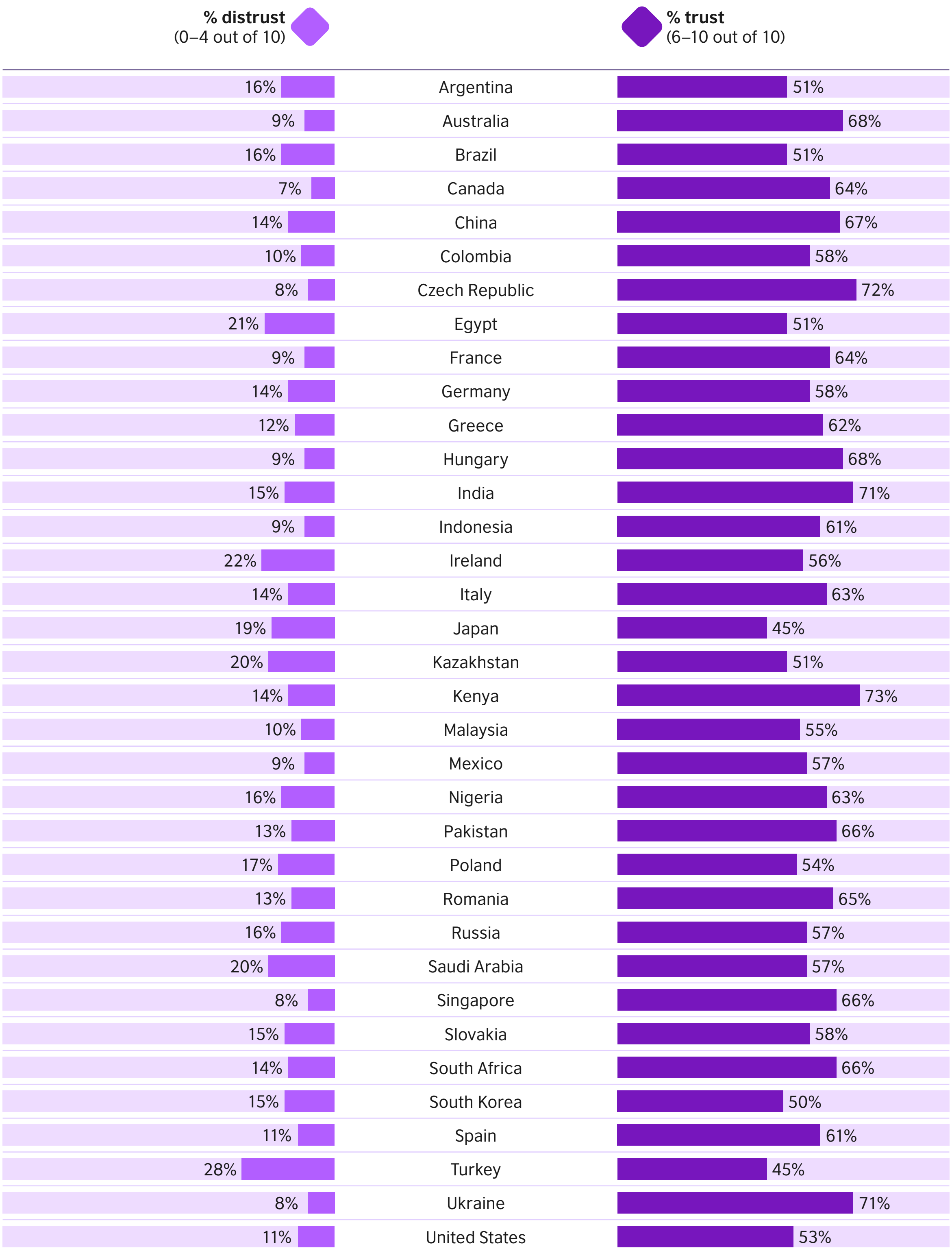
**Trust in institutions**

| | 2016 (pre) | 2016 (post) | 2018 | **2020** |
|---|---|---|---|---|
| **G20 average** | **2** | **2** | **2** | **1** |
| Argentina | 4 | 3 | 3 | **3** |
| Australia | 2 | 2 | 2 | **1** |
| Brazil | 5 | 8 | 2 | **4** |
| Canada | 1 | 1 | 1 | **1** |
| China | 2 | 1 | 2 | **2** |
| France | 2 | 2 | 3 | **3** |
| Germany | 3 | 3 | 2 | **3** |
| India | 1 | 1 | 3 | **2** |
| Indonesia | 2 | 2 | 2 | **1** |
| Italy | 2 | 3 | 1 | **4** |
| Japan | 1 | 2 | 3 | **1** |
| Mexico | 6 | 6 | 5 | **4** |
| Russia | 4 | 4 | 5 | **2** |
| Saudi Arabia | 4 | 5 | 4 | **1** |
| South Africa | 1 | 2 | 2 | **1** |
| South Korea | 4 | 4 | 3 | **3** |
| Turkey | 6 | 4 | 5 | **4** |
| United States | 4 | 2 | 2 | **2** |

**Overall attractiveness**

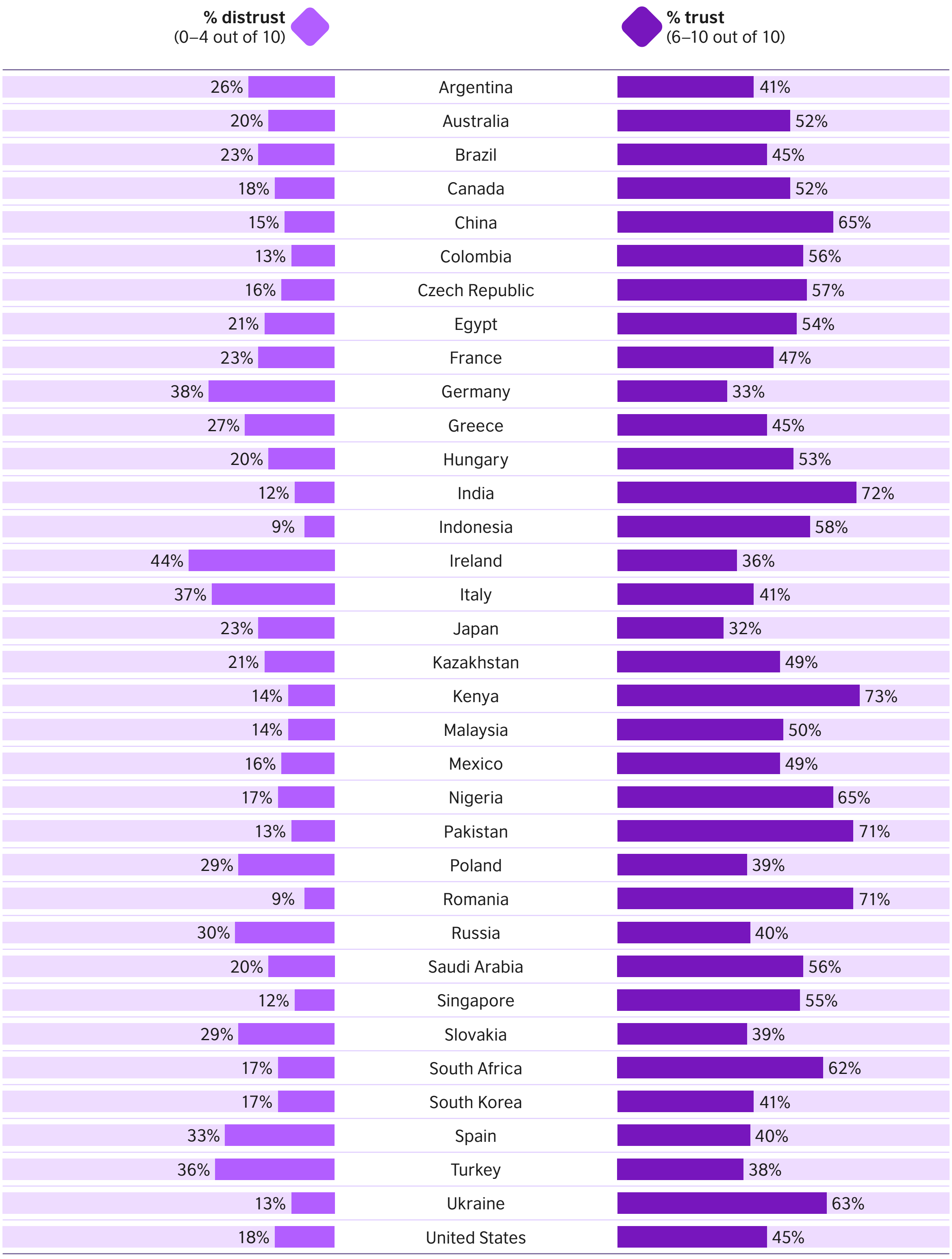
| | 2016 (pre) | 2016 (post) | 2018 | **2020** |
|---|---|---|---|---|
| **G20 average** | **3** | **4** | **4** | **1** |
| Argentina | 5 | 8 | 6 | **7** |
| Australia | 2 | 1 | 2 | **2** |
| Brazil | 8 | 8 | 6 | **7** |
| Canada | 2 | 2 | 3 | **2** |
| China | 3 | 2 | 2 | **2** |
| France | 4 | 5 | 3 | **5** |
| Germany | 3 | 3 | 4 | **5** |
| India | 1 | 2 | 3 | **2** |
| Indonesia | 3 | 2 | 2 | **3** |
| Italy | 3 | 4 | 3 | **5** |
| Japan | 3 | 7 | 2 | **4** |
| Mexico | 6 | 6 | 5 | **5** |
| Russia | 5 | 4 | 6 | **5** |
| Saudi Arabia | 7 | 8 | 7 | **1** |
| South Africa | 1 | 3 | 1 | **1** |
| South Korea | 2 | 3 | 3 | **4** |
| Turkey | 7 | 8 | 7 | **5** |
| United States | 5 | 4 | 5 | **4** |

**Figure 12. The UK's scores for trust in people from 35 countries**



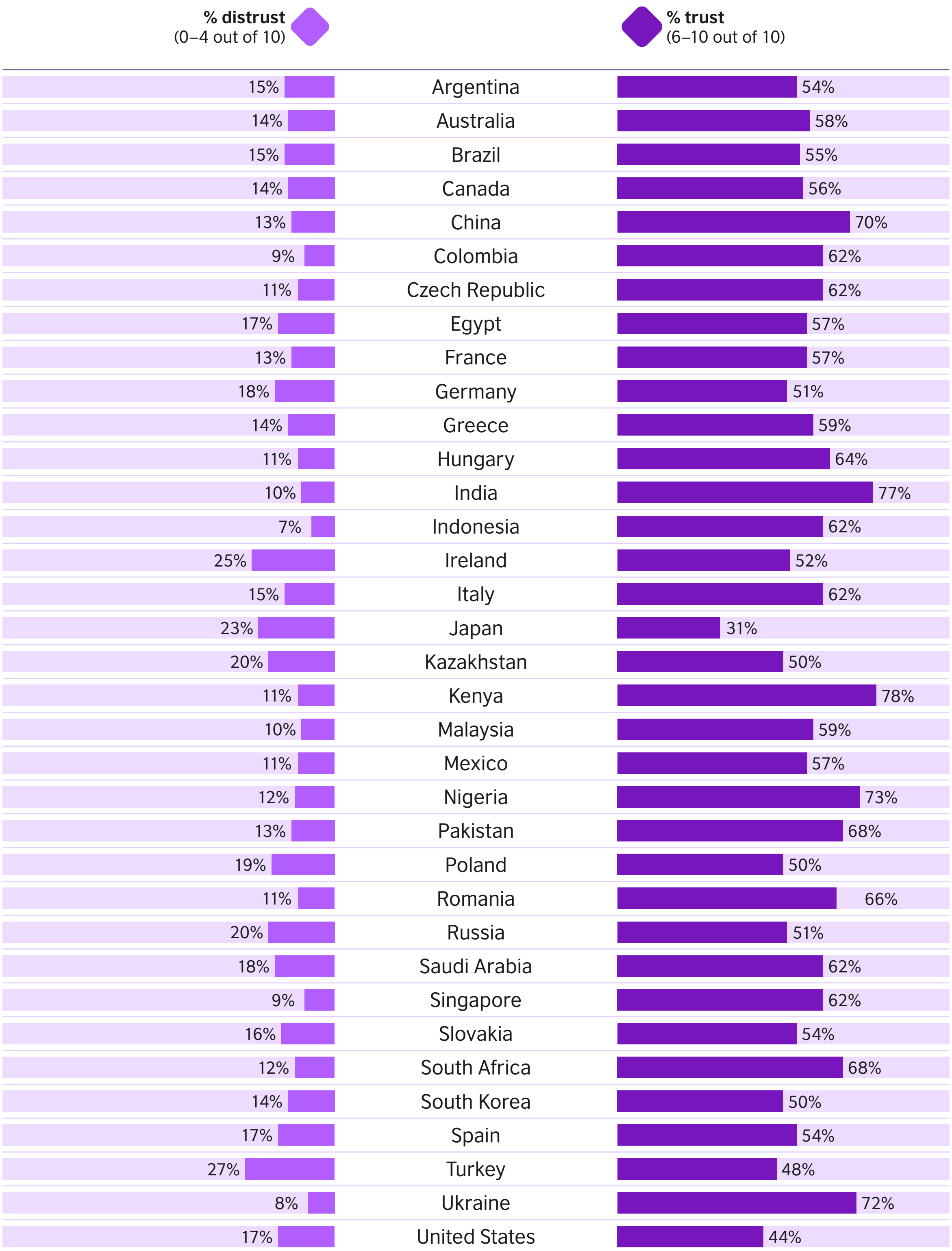

*Base: All participants except the UK [34,550]*

**Figure 13. The UK's scores for trust in government from 35 countries**




*Base: All participants except the UK [34,550]*

**Figure 14. The UK's scores for trust in institutions from 35 countries**




*Base: All participants except the UK [34,550]*

Indeed, the scores from Pakistan are particularly interesting and worth giving in greater detail as they show why the UK is ranked first overall across all 36 countries. The UK is ranked seventh for trust in people (66 per cent), behind Saudi Arabia (86 per cent), Turkey (78 per cent), China (73 per cent), Malaysia (68 per cent), Egypt and Japan (both 67 per cent). It is fourth for trust in government (71 per cent), behind Saudi Arabia (87 per cent), China (75 per cent) and Turkey (74 per cent). And fourth for trust in institutions (68 per cent), behind Saudi Arabia (83 per cent), China (75 per cent) and Turkey (74 per cent). The scores for overall attractiveness follow a similar pattern, with Saudi Arabia again first on 87 per cent, followed by China on 77 per cent and Japan on 76 per cent, just ahead of the UK.

The data shows that the UK's results are generally far more consistent than other countries, frequently ranking in the top five across all 36 countries. By way of illustration, in Pakistan the UK's close rivals Canada, Italy and Australia rank ninth, tenth and 13th respectively.

Of course, what really makes these results from Pakistan especially interesting is the performance of Saudi Arabia and China, which is so markedly different to other parts of the world. It reflects strong bonds of amity and trust between these countries born of extensive cultural and economic engagement, for example the multi-billion-dollar China–Pakistan Economic Corridor.

## The Indo-Pacific

The UK performs well in Asia on overall attractiveness. In addition to the positive results from China, Kazakhstan, Malaysia and Singapore highlighted above, the UK ranked fourth in Indonesia (85 per cent), South Korea (66 per cent) and Japan (55 per cent). The UK's position is certainly strong compared to other Western powers and even compares well with local regional powers. In Malaysia, for example, Japan is first for overall attractiveness on 81 per cent (just five percentage points ahead of the UK), Australia is second on 77 per cent and South Korea fourth on 75 per cent (i.e. respectively just one percentage point ahead and behind the UK). France is fifth on 68 per cent, the USA eighth on 64 per cent and Germany 11th on 60 per cent. These findings might alleviate the scepticism of some over the proposed 'Indo-Pacific tilt' set out in the Integrated Review.

The UK is in a strong position as an attractive and trusted partner. In Japan, for example, the UK is second for trust in people (45 per cent) and government (32 per cent), behind Australia (the respective scores are 51 per cent and 32 per cent – the UK has a slightly higher score than Australia for distrust, resulting in second place), and first for institutions (31 per cent, with Australia second on 29 per cent and the USA third on 28 per cent). Even when we include all 36 countries and factor in a larger number of the region's leading actors, the UK's position remains impressive. In Malaysia the UK is third across the three trust metrics, behind Singapore and Japan, while in Indonesia it is sixth for trust in people and government but first for trust in institutions.

This gives a robust platform for expanding and deepening connections to demonstrate the Indo-Pacific tilt is far more than a snappy slogan. Work on developing links in the region is already advancing apace, with one of the most eye-catching actions to date being the formal application to join the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). The UK has an attractive and quite distinct economic and cultural offer to the members of the CPTPP.

The UK's soft power gives it real edge and puts it ahead of other countries looking to 'pivot' or 'tilt' to the region. Historic ties, high levels of trust, stability, democracy and a reputation as a centre for culture, education and fair play are important to the UK's appeal, giving it an advantage over other states that otherwise have a similar offer in terms of GDP, etc.

Drawing on the UK's strengths in education, science, culture and the creative industries will provide it with a platform for enhancing co-operation across a wider range of areas, including trade and security. The high levels of trust in the people, government and institutions of the UK evident in the data demonstrate that the country is seen as a benign international actor, pragmatic and focused on the common good. In sum, it is pushing at an open door but now needs to demonstrate its value to partners and define its regional role to fully realise the ambitions of the Indo-Pacific tilt.

## Europe

The UK faces a challenge in Europe. It ranks significantly lower among EU states for overall attractiveness than in other parts of the world. The UK ranks fourth in Greece (77 per cent); fifth in the Czech Republic (77 per cent), France (70 per cent), Romania (78 per cent) and Spain (78 per cent); sixth in Italy (78 per cent); eighth in Slovakia (66 per cent); ninth in Germany (63 per cent); tenth in Poland (66 per cent); and 12th in Ireland (61 per cent). Hungary is something of an outlier with the UK ranking second for overall attractiveness on 78 per cent.

Looking at the trend data we have for the G20 EU states, the UK is down in all three (see Figure 15 on page 33). Surveyed before the 2016 referendum the UK was fourth in France for overall attractiveness and third in both Germany and Italy. In the weeks after the vote the ranks were fifth, third and fourth respectively. There was a recovery in 2018 (third, fourth, third), but in 2020 the UK came fifth in all three.[8]

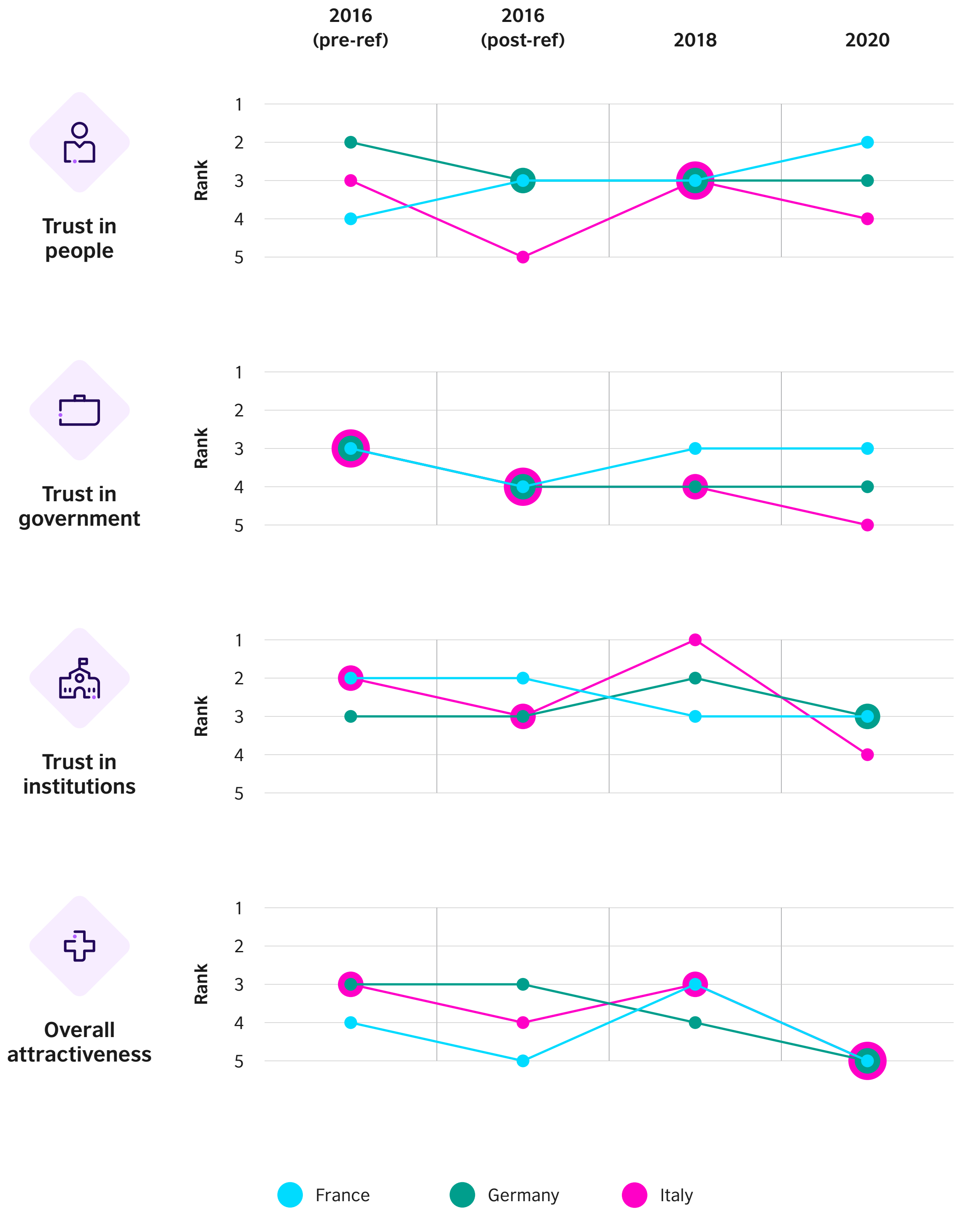
The results in 2018 were at the time[9] seen as encouraging, suggesting that the shock of the referendum result might only have a temporary impact on perceptions of the UK. That the UK is now in a worse place with its European neighbours than it was before the vote even took place is therefore highly significant, and should be of considerable concern to UK policymakers. Perceptions shape behaviour, so should the evident loss of affection prove to be the new normal, Europeans who might once have chosen the UK, for study or trade say, may look elsewhere – whether it's another European country, an alternative anglophone destination like Canada or somewhere else entirely like China or Dubai. If the UK is to avoid a permanent loss of strategic influence, partnership, attraction and connection in its immediate neighbourhood, it will need to work hard to renew strained relations.

This is especially true of the one EU country with which the UK shares a land border. Young Irish respondents to the survey not only gave the UK its worst ranking for overall attractiveness, they also gave the highest score for 'unattractive'. Fully 24 per cent of Irish respondents found the UK unattractive (i.e. they scored the UK between 0 and 4 out of 10 for overall attractiveness). The only other country to score the UK close to this was Turkey (21 per cent), and young Turks still ranked the UK seventh for attractiveness.

**That the UK is now in a worse place with its European neighbours than it was before the vote even took place is therefore highly significant, and should be of considerable concern to UK policymakers.**

8. The trend data referred to is from the G20 and not the full 36 countries surveyed in 2020.
9. British Council (2018) *Powers of attraction.* Available online at: www.britishcouncil.org/sites/default/files/j136_thought_leadership_g20_perceptions_196x284mm_final_web_v3.pdf (accessed 14 May 2021).

**Figure 15. Changes in the UK's rankings for overall attractiveness and trust from France, Germany and Italy**



The unusually high degree of negativity is underlined by the UK's average score for unattractiveness across the 36 countries, which stands at 11 per cent. Even in places where recent history would suggest that the UK might be seen as unattractive, the actual scores track much closer to the average. For example, despite heightened tensions in the bilateral relationship, in Russia the UK's unattractiveness stands at 12 per cent, while it is ranked seventh for attractiveness (73 per cent).

There are complex historical reasons for the results from the Republic of Ireland that are far deeper, older and more profound than Brexit. However, hurt and anger over the European issue cannot be discounted from the results.

Importantly, trust also falls significantly below the mean rankings. The UK ranks sixth out of the 36 countries for trust in people (scoring 56 per cent for trust and 22 per cent for distrust). Canada, Spain, Australia, Italy, Japan and Germany all score higher, with the scores for top-ranked Canada standing at 71 per cent for trust and just eight per cent for distrust. However, it is the results on trust in government that are especially telling. The UK is ranked ninth, scoring 36 per cent for trust and 44 per cent for distrust. Again, Canada is first, scoring 64 per cent and 11 per cent respectively.

The comparison is stark. The bilateral relationship between the UK and Ireland is hugely important to the prosperity and security of both countries. London and Dublin need to work together to heal past divisions, restore trust and build a better tomorrow.

A lack of trust following the fractious and protracted process of leaving the EU is at the heart of the UK's weak performance across the European states surveyed. The trend data for trust in government is revealing. In Germany, trust in government was 33 per cent with distrust at 38 per cent. Again, by way of comparison, first-placed Canada scored 58 per cent and 15 per cent respectively. More striking is the comparison with the data from 2016. Pre-referendum the UK's scores for trust in government were 49 per cent trust and 22 per cent distrust. Immediately post-referendum the scores were 39 per cent and 33 per cent, almost a mirror image of the scores in 2020.

The trend results from Italy and France make similarly grim reading. In Italy pre-referendum the scores were 69 per cent trust and 11 per cent distrust, while post-referendum they were 61 per cent and 16 per cent. In 2020 the two scores reached near parity: 41 per cent trust and 37 per cent distrust. In France the three data points were: 52 per cent/15 per cent, 45 per cent/19 per cent and 47 per cent/23 per cent.

We lack trend data for other countries, but the negativity does appear to be widespread. In Poland, for example, the UK came 11th out of the 36 countries for trust in government on 39 per cent trust and 29 per cent distrust. Here Ireland was the most trusted government, scoring 53 per cent trust and 18 per cent distrust.

However, there are exceptions to this picture of significantly depressed levels of trust. The results from the Czech Republic have the UK second – behind Slovakia – for both trust in people (72 per cent trust, eight per cent distrust) and trust in government (57 per cent trust, 16 per cent distrust), and first for trust in institutions (62 per cent trust and 11 per cent distrust). It's a similar picture in Hungary where the UK is second across all three metrics.

Repairing the damage done to perceptions of the UK across the EU is vital to the country's future security and prosperity. Working with groupings like the E3 and the Visegrád Four to achieve shared goals will help. There is also space for new forums like the proposed expansion of the existing G7 group,[10] which already counts France, Germany and Italy as members, to include Australia, India, South Africa and South Korea.

UK hard power has a critical role, with the UK's commitment to the security of Europe as a leading member of NATO, and the global success of the City of London, crucial to the prosperity of Europe as a whole.

10. Foreign Policy (2020) *Forget the G-7, Build the D-10.* Available online at: foreignpolicy.com/2020/06/10/g7-d10-democracy-trump-europe/ (accessed 14 May 2021).

Collectivist government action on issues like climate change, human rights and international development would demonstrate to people across the continent that for all the *Sturm und Drang* of Brexit, not so much has really changed; like-minded Brits and Europeans still share the same values and want the same things. Working together we can amplify our voices and international impact. Engagement in pan-European cultural and educational initiatives, including festivals and exchange programmes, whether under the umbrella of the EU or through other networks and programmes, would help reaffirm that the UK is a committed member of the European family of nations in the eyes of young Europeans.

Given the evident loss of trust and confidence that young Europeans have in the UK government, non-state actors are perhaps best placed to lead the charge in winning back hearts and minds. The British Council, an organisation that exists to build connections, understanding and trust between people in the UK and other countries through arts and culture, education and the English language, is uniquely placed to help restore relations through collaborative work across the arts, education, science and international development.

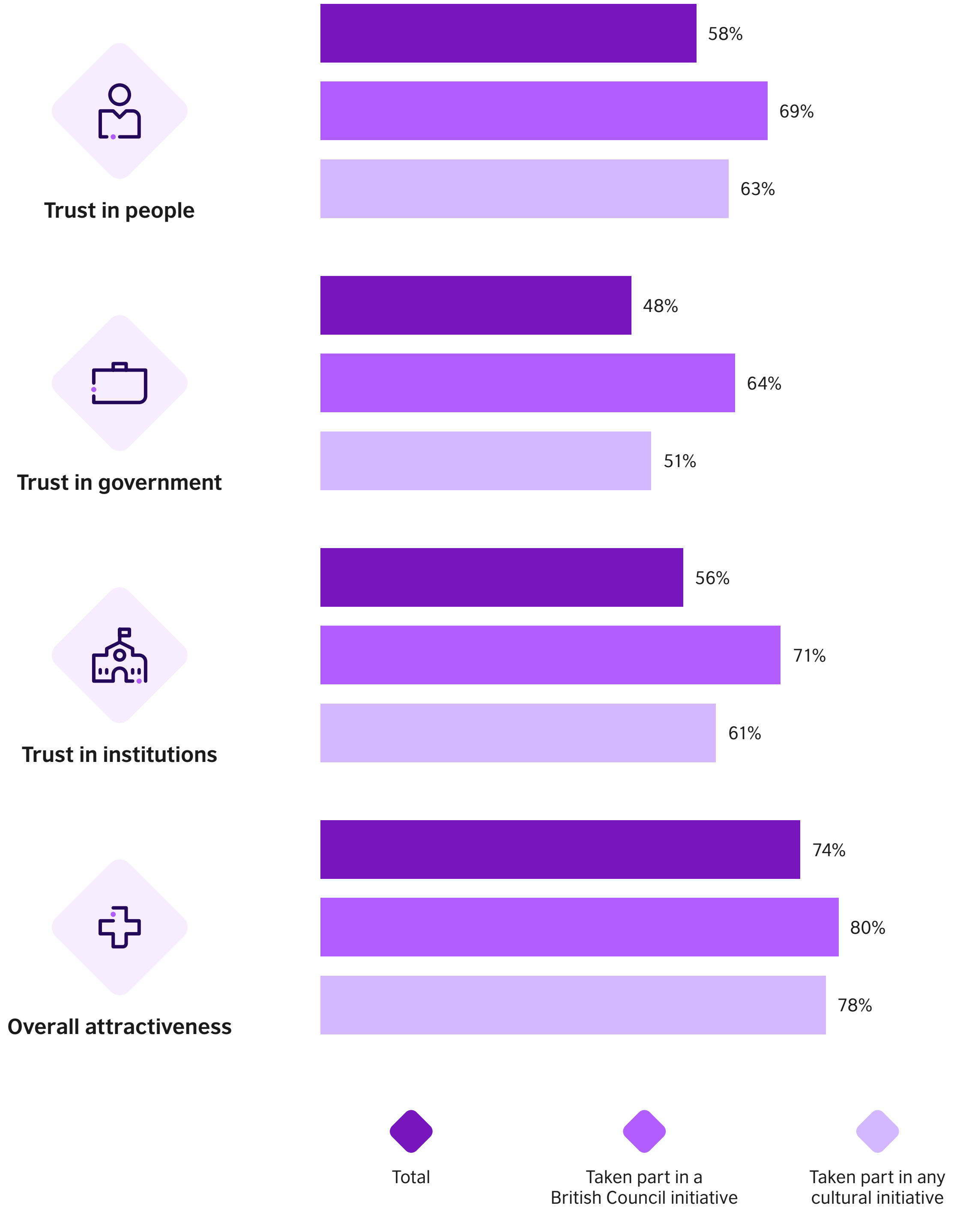
Crucially, such endeavours, especially where they are curated by a cultural relations institute rather than just *ad hoc* arrangements, have a transformative impact on trust in government. Analysis of the data from respondents to the soft power survey from G20 states is revealing (see Figure 16 on page 36). While the UK's mean score for trust in government in the G20 was 48 per cent, for those who had participated in a UK cultural initiative the score was slightly higher at 51 per cent. However, where this engagement was curated by the British Council it was 64 per cent.

A further dimension to explore is co-operation with European partners in third countries, for example the British Council's work with the Swedish Institute in the Western Balkans.[11] This is a potentially powerful model for rebuilding trust. Working together with European cultural and educational institutions like the DAAD (Deutscher Akademischer Austauschdienst), Nuffic, Campus France and Instituto Cervantes, either bilaterally or in combination, to facilitate exchange programmes, policy forums, strategic dialogues, festivals and other events – both between partner countries and countries in the European neighbourhood like Israel, Morocco and Ukraine – has significant potential to show the UK is fully engaged and committed to Europe.

**While the UK's mean score for trust in government in the G20 results was 48 per cent, for those who had participated in a UK cultural initiative the score was slightly higher at 51 per cent. However, where this engagement was curated by the British Council it was 64 per cent.**

11. British Council (2018) *Study of the challenges that hinder MSME development in the Western Balkans.* Available online at: www.britishcouncil.ba/sites/default/files/report_western_balkans.pdf (accessed 14 May 2021).

**Figure 16. While taking part in any kind of activity has a positive impact on key metrics, taking part in a British Council initiative pushes scores higher**




*Base: Q19a. Which, if any, of the following have you ever done? / Q20. Did this activity / event involve the British Council? All participants in the G20 [20,612]*

Co-operation in areas like culture, education and science has admittedly been made more complicated by the UK's departure from the EU. However, perseverance and imagination can overcome the barriers to co-operation to create new channels for the continued sharing of ideas and the fostering of trust.

The new Turing programme promotes outward student mobility from the UK to develop valuable intercultural skills and experience that will benefit participants throughout their working lives. Consideration of how to support and encourage the movement of young people to live, work and study in the UK must also be part of the mix. Young artists, students, researchers and entrepreneurs should be being encouraged to come to the UK on a temporary basis. Recent reforms of the student visa regulations around post-study work are therefore very welcome.

The immersive experience of spending a sustained period of time, ideally a year or two, in a country has a transformative impact on perceptions. We explored this phenomenon in depth in 2020's *Sources of soft power* report.[12] One of the findings of the paper was that those who have studied in the UK are 26 per cent more positive about the UK's contribution to international development than those that have not. This matters because perceptions of the country's aid programme are the single strongest driver of trust in the UK government.[13] Enabling young people, both from Europe but also the world at large, to spend time living and working in the UK should be a priority. Building on the success of the recent reforms to student visas, the UK could also consider expanding the list of countries that fall within the Youth Mobility Scheme visa beyond the current nine.

## The Commonwealth

The UK's relationships with former colonies are laden with considerable and, at times, deeply uncomfortable historical baggage. Given difficult shared histories the fact that the UK is viewed by the young people surveyed in Kenya, Malaysia, Nigeria, Pakistan and South Africa as more attractive and trustworthy than other leading states with less complicated shared stories warrants greater recognition.

What the data tells us is that there is real potential for collaboration and the deepening of links with countries with whom the UK shares close cultural and historical connections. That requires open and honest engagement. The past cannot be undone, nor should it be ignored. Dialogue and mutual recognition, and exploration, of the past is an important part of building a stronger shared future. In seeking to realise its ambitions for Global Britain set out in the Integrated Review, it is critically important that the government's actions are driven by a positive, outward-looking vision of the future based on partnership and real understanding of the past rather than nostalgia for a bygone era.

The data reveals there is an opportunity for the UK to work collectively with Commonwealth partners from across Asia and Africa, as well as Canada, Australia and New Zealand. While we do not have data from the whole of the Commonwealth – the Caribbean being a notable gap in the geographic coverage of the survey – as a family of like-minded democracies that share similar values rooted in freedom, respect, peaceful collaboration and, yes, history and culture, it is reasonable to suppose similar positive perceptions pertain across the membership.

> There are 54 countries in the Commonwealth, in Africa, Asia, the Americas, Europe and the Pacific. Commonwealth countries are diverse – they are amongst the world's biggest, smallest, richest and poorest countries ... 32 of our members are classified as small states. Small states are especially vulnerable to things like climate change or developmental challenges.[14]

12. British Council (2020) *Sources of soft power*. Available online at: www.britishcouncil.org/sites/default/files/sources-soft-power-report-perceptions-success.pdf (accessed 14 May 2021).
13. British Council (2018) *Value of trust*. Available online at: www.britishcouncil.org/sites/default/files/the_value_of_trust.pdf (accessed 14 May 2021).
14. Commonwealth Secretariat (2021) Member Countries. Available online at: thecommonwealth.org/member-countries (accessed 14 May 2021).

The Commonwealth is deeply unfashionable. It has tended to be regarded as an anachronism, a relic of the past. Yet investing in the Commonwealth, reinvigorating and deepening existing cultural and economic links, presents a unique opportunity for the UK and could be a real boon for developing economies that have been routinely shut out of wealthy markets like the EU. There is real potential to do more with what is a vastly underrated platform for fostering trust and building and magnifying UK influence.

There are several states keen to join the Commonwealth and though membership has traditionally been reserved for countries with historic ties to the UK, in recent years it has expanded beyond former British colonies to bring in Mozambique and Rwanda. It could be broadened further to other states that share existing members' commitment to freedom, peace, multilateral co-operation and sustainable development.

The Integrated Review places great weight on the UK as a force for good in the world. Investing in the Commonwealth, a family of like-minded nations that shares so much in common, presents one of the best ways to live up to this ambition.

## Sub-Saharan Africa

The Integrated Review recognises the importance of African powers to the UK's future success and how shared values and security interests are a point of convergence. It offers a promise to:

> Work in partnership with South Africa, Nigeria, Kenya, Ethiopia and Ghana in particular to further our shared prosperity goals, our democratic values and our security interests. South Africa and Nigeria are regional powers with global reach through international fora, with which we share common values and commercial and development interests: together they account for 46% of GDP in sub-Saharan Africa and for 60% of its trade with the UK. [15]

The government's commitment to support UN and African peacekeeping missions set out in the Integrated Review is also highly significant. UK military expertise is highly valued, and support for resolution and stabilisation efforts in the Horn of Africa and the Sahel has real potential to enhance the UK's standing across the continent, building on previous interventions during the Western African Ebola virus epidemic and the Sierra Leone Civil War. Humanitarian and peacekeeping operations powerfully show both the values and capabilities of the UK.

Such interventions, combined with significant increases in economic engagement following the UK's exit from the EU and bilateral arrangements like the UK–Kenya Strategic Partnership, have the potential to form a powerful counterweight to the expansion of Chinese influence in Africa. China has been heavily investing in countries across the continent through the BRI, its aid programme and through commercial activities like telecoms and mining, leaving Western policymakers increasingly alarmed about China's growing influence.

The trend data we have from South Africa is particularly interesting. Mirroring the G20 mean trend, China's score for overall attractiveness has barely shifted between the 2016 and 2020 surveys – standing at 55 per cent in early 2016 and 56 per cent in 2020 – though it has dropped in rank from 11th to 15th place (looking only at the G20 trend data). On trust China's scores have declined, with trust in government tracking the trajectory of the G20 mean scores with 30 per cent trust and 40 per cent distrust in the pre-ref survey and 27 per cent/51 per cent in 2020. This despite data showing that:

> China is South Africa's biggest trading partner, with bilateral trade growing 11.7% to $39.17bn in 2017 – just under a third of total China–Africa trade. Chinese foreign direct investment (FDI) into South Africa reached $15.2bn in 2017, or 19% of total FDI, making the country the second-largest recipient of Chinese FDI in sub-Saharan Africa after Nigeria. [16]

15. UK government (2021) *Global Britain in a competitive age: The Integrated Review of Security, Defence, Development and Foreign Policy.* Available online at: assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/975077/Global_Britain_in_a_Competitive_Age-_the_Integrated_Review_of_Security__Defence__Development_and_Foreign_Policy.pdf (accessed 14 May 2021).
16. Chris Torrens (2018) *Chinese Investment in South Africa.* Available online at: www.controlrisks.com/our-thinking/insights/chinese-investment-in-south-africa (accessed 14 May 2021).

The data from Kenya is also interesting. Out of the 36 states, the UK is first for overall attractiveness while China is 31st, with the UK scoring 88 per cent attractive and China 56 per cent. It is a similar picture on trust, with the UK first for trust in people (73 per cent) and institutions (78 per cent), and second for trust in government (73 per cent, with distrust at 14 per cent). China's scores for trust in government are 41 per cent trust and 44 per cent distrust. Feelings are somewhat warmer in Nigeria where China comes 13th for overall attractiveness on 72 per cent and 14th for trust in government (48 per cent/28 per cent).

Perceptions can vary dramatically between and indeed within states, so it would be wrong to extrapolate too much from these findings. However, the perceptions data does suggest that China's influence, at least in these three states, is likely to be based more on hard (economic) power rather than soft power. It is therefore more transactional and opportunistic. As Audrye Wong notes in Foreign Affairs:

> China has managed to massively expand its economic presence beyond its borders, but so far, it has failed to turn it into long-term strategic influence. The Chinese economy exerts a strong gravitational pull, but as Beijing is discovering, that does not necessarily mean that other countries are altering their political orbits.[17]

However, as we have seen with the examples of Italy and Pakistan given above, where circumstances allow, China's approach to soft power can be highly impactful, giving the country increased, lasting influence. Just because Chinese efforts in Africa have had limited impact to date, it does not follow that this will always be the case. Sustained Chinese interest and investment is already having an effect, building the networks through which future influence will flow. Complacency in the face of China's massive investment in soft power could prove severely detrimental to Western interests.

Just one example is illustrative of the scale of Chinese ambitions. As of 2020 there were 641 Confucius Institutes and Confucius Classrooms around the world, twice as many as there were in 2013, with Confucius Institutes now outnumbering the offices of the British Council three to one. This gives China unprecedented global reach and the capability to grow its influence. Given how favourably the UK is seen in Kenya, Nigeria and South Africa, there is a unique opportunity for the UK to act. The high levels of trust and attraction that come from shared values, culture and history offer a chance to deepen engagement with these states to mutual advantage, and, in so doing, build a bulwark to burgeoning Chinese influence.

## The Americas

There is a quite mixed picture across the Americas. While the UK performs well in Canada and the USA, the further south in the Americas one goes, the lower the UK's rank for overall attractiveness: fifth in Mexico (82 per cent), sixth in Colombia (84 per cent), eighth in Brazil (75 per cent) and ninth in Argentina (80 per cent).

It is interesting to speculate upon the reasons for the differing perceptions of the UK from Nova Scotia through New England and on finally to Y Wladfa in Patagonia. History clearly plays a role in Argentina but is also likely an important factor elsewhere across the region. The familiarity that is so evident in the results from the UK's former colonies in North America is less a feature in Latin America where the dominant colonial powers were Spain and Portugal. Across Central and South America other European countries, specifically France, Germany, Italy and Spain, frequently outperform the UK on attractiveness. Australia, Canada, Japan and the USA also perform strongly. They are more familiar and more immediately relevant to people's day-to-day lives, whether through geographic or cultural proximity.

17. Foreign Affairs (2021) *How Not to Win Allies and Influence Geopolitics: China's Self-Defeating Economic Statecraft.* Available online at: www.foreignaffairs.com/articles/china/2021-04-20/how-not-win-allies-and-influence-geopolitics (accessed 14 May 2021).

Interestingly, though, when it comes to trust the UK appears to be in a stronger position, though there is some variation between states. In Colombia, for example, the UK is second (to Canada) for all three of our trust metrics. In Mexico the UK is equal third for trust in people, sixth for trust in government and fourth for trust in institutions. Even in Argentina where the UK is eighth for trust in government, it is fifth for trust in people, and third for trust in institutions.

If the UK's Global Britain policy is to include Latin America, there is a task for the UK government in investing in raising the country's profile and forging new connections across a region where young people generally turn first to Italy, Spain or the USA before they think of the UK. Across the attractiveness datasets, the UK performs well below trend. For example, in Colombia it ranks fourth of the 19 G20 states as a place to study (27 per cent, well behind the USA on 56 per cent, Canada 47 per cent and Germany 32 per cent); it is tenth as a source of arts and culture and for tourism; and sixth as place to do business/trade. On the business/trade metric it scored just 16 per cent, far adrift of the 68 per cent for the USA in first place and second-placed China (39 per cent).

The data suggests that accession to the CPTPP is again a particularly shrewd strategic choice for the UK as it offers a readymade vehicle for strengthening the UK's economic connections with countries in the Americas – Canada, Chile and Peru are already members and others, including Colombia, are considering joining in future. The UK is also an Observer to the Organization of American States and the Comunidade dos Países de Língua Portuguesa. It could look to build further such political, economic and cultural links to other regional bodies, for example by following New Zealand's example and engaging with Mercosur, as well as exploring closer bilateral relationships with individual states where engagement could prove to be particularly fruitful, e.g. Colombia and Mexico.

Building familiarity through curated engagement in cultural and educational programmes, like seasons and festivals, is one of the best ways to raise familiarity and shift perceptions at scale. The UK in Mexico [18] season – organised by the British Council and British Embassy and covering the arts, education, science and trade – featured close to 400 events and programmes in all 32 Mexican states. It was attended by 1.5 million people and had a media reach of 1.3 billion. This is an example of what can be achieved through focused, co-ordinated programming in multiple areas.

There is a demand in the region for UK knowledge and expertise that is only beginning to be tapped. The award-winning British Council-managed Plan Ceibal [19] teaching programme, which provides English lessons remotely (via video conferencing) to over 80,000 children in 568 Uruguayan state primary schools, is a powerful example of what can be achieved at scale through innovative digital interventions that leverage the UK's soft power.

**It is interesting to speculate upon the reasons for the differing perceptions of the UK from Nova Scotia through New England and on finally to Y Wladfa in Patagonia.**

18. British Council (2021) *Previous Festivals and Seasons*. Available online at: www.britishcouncil.org/arts/seasons/previous (accessed 14 May 2021).
19. British Council (2021) *Plan Ceibal – Remote Teaching into Uruguayan public schools.* Available online at: www.britishcouncil.uy/en/programmes/education/ceibal-en-ingles?_ga=2.141717618.1979430428.1619437031-1338015932.1581955965 (accessed 14 May 2021).

## The view from the UK

Having looked at global trends and considered the forces behind the UK's soft power success, we turn now to how the UK itself sees the world.

The results from young British respondents to the survey have been remarkably stable down the years of the survey. Unable to vote for their own country, young British people have consistently placed Canada first for overall attractiveness with Italy and Australia switching back and forth between second and third. The scores in 2020 were remarkably close (see Figure 17 on page 42). Both Canada and Italy scored 73 per cent for attractiveness, but Canada pulled ahead as it scored 12 per cent for unattractiveness versus Italy's score of 13 per cent. Australia's scoring 72 per cent/14 per cent placed it in third place (see Figure 18 on page 43 for how these ranks have changed over time).

On trust Canada is again the leader, scoring 67 per cent for trust in people, 52 per cent for trust in government and 53 per cent for trust in institutions. Australia retains its second place among G20 states as the UK's most trusted country (62 per cent, 46 per cent and 48 per cent). France is third for trust in people (55 per cent), while Germany takes third for trust in government (45 per cent) and institutions (48 per cent, but with a higher score for distrust than Australia). People from the UK favour other advanced, liberal, democratic countries.

A noteworthy point is that the distrust of the UK expressed by young Irish respondents to the survey is not mutual. Young Brits ranked Ireland fifth out of the 36 countries for trust in people (54 per cent), second for trust in government (47 per cent) and third for trust in institutions (48 per cent).

The UK tends to track remarkably close to the G20 mean in how it scores other countries, with one notable exception – attitudes towards Russia. Looking at the average results Russia is tenth for overall attractiveness, up four ranks on 2018 with a score of 52 per cent. However, in the UK Russia is stuck in 17th place out of the 19 G20 states, the same rank it has held since 2016, with a score of 35 per cent.

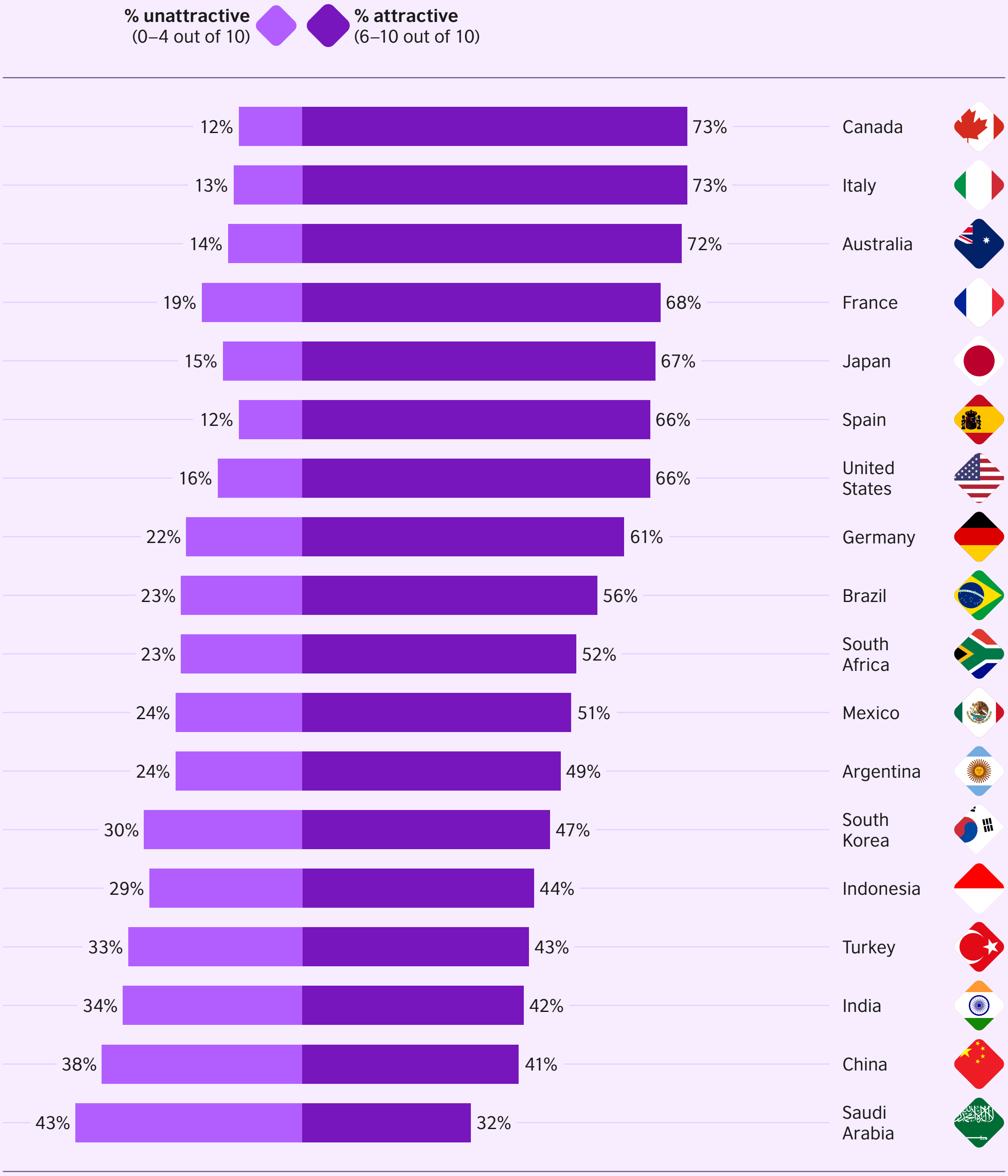
British survey respondents also distrust Russia. The global mean for Russia across all three trust metrics has hovered around tenth or 11th place, with scores in 2020 of 33 per cent for trust in people, 30 per cent for trust in government and 33 per cent again for trust in institutions. In the UK these scores were 23 per cent, 17 per cent and 21 per cent. The corresponding scores for distrust were 50 per cent, 61 per cent and 53 per cent (compared to the mean G20 results of 33 per cent, 44 per cent and 37 per cent). These rankings are significantly worse than those from other Western countries which tend to track closer to the global mean. Young Germans, for example, rank the Russian government ninth out of the G20 for trust, though the actual scores are remarkably similar to the UK (19 per cent trust, 63 per cent distrust).

The soft power survey not only asked what young British respondents made of other countries. It also asked them how they thought people from other countries viewed the UK. Respondents scored the UK 68 per cent for overall attractiveness, 56 per cent for trust in people, 42 per cent for trust in government (with a score of 35 per cent for distrust) and 53 per cent for trust in institutions (see Figure 19 on page 44). Remember the mean scores from the G20 (excluding UK respondents) were respectively 74 per cent, 58 per cent, 48 per cent/22 per cent and 56 per cent. The data suggests respondents have a reasonably clear-eyed view of their own country, albeit with a distinctly British disdain for the government.

**Figure 17. How young people from the UK view the attractiveness of other G20 states**

How attractive overall do you find each of the following countries?

Participant's own country not ranked.

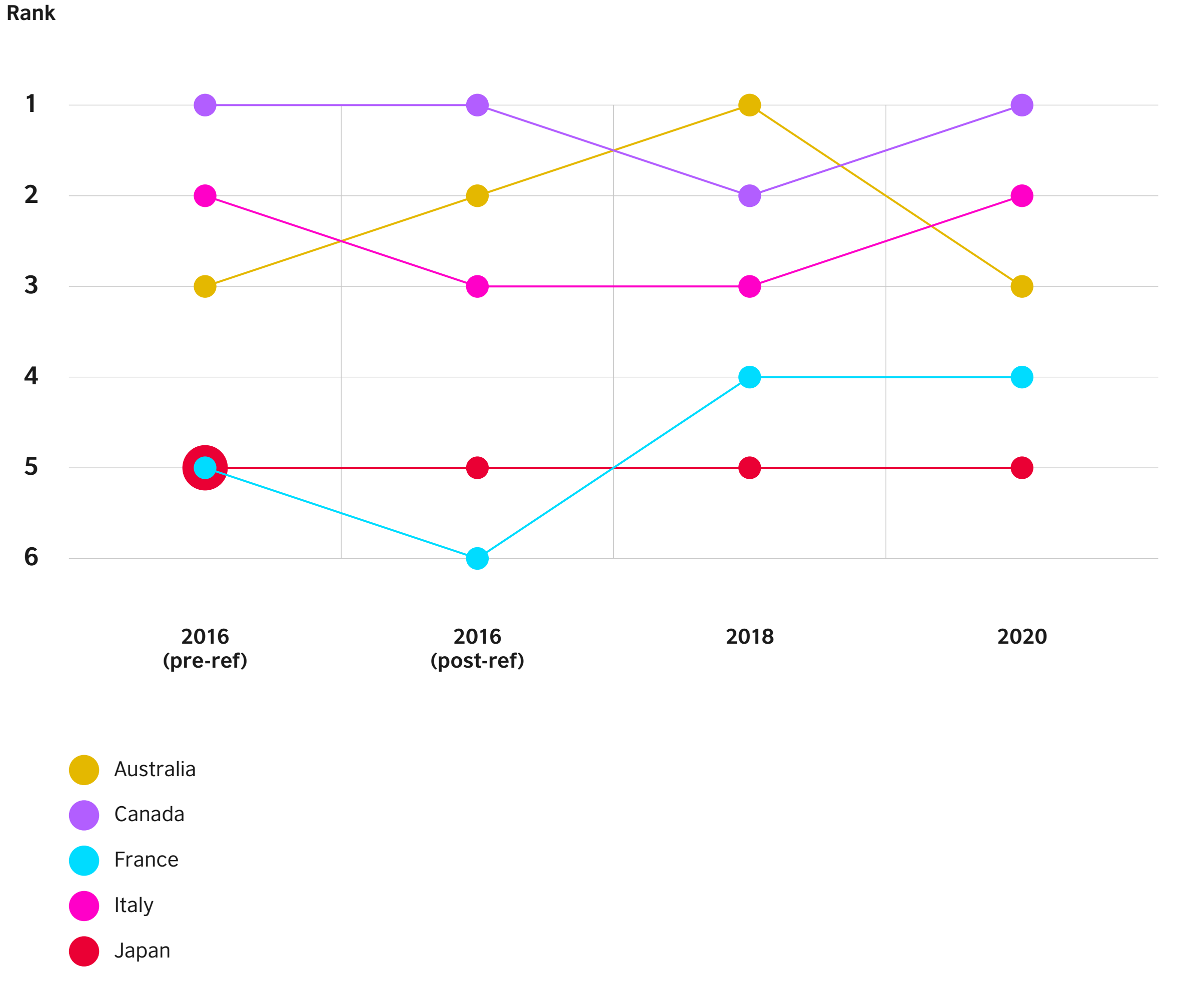



*Base: All participants in UK [2,608]*

**Figure 18. Changing attractiveness rankings of the 2020 top 5 scoring states in the UK**

How attractive overall do you find each of the following countries?

Participant's own country not ranked. G20 countries shown only since all other countries new for 2020.

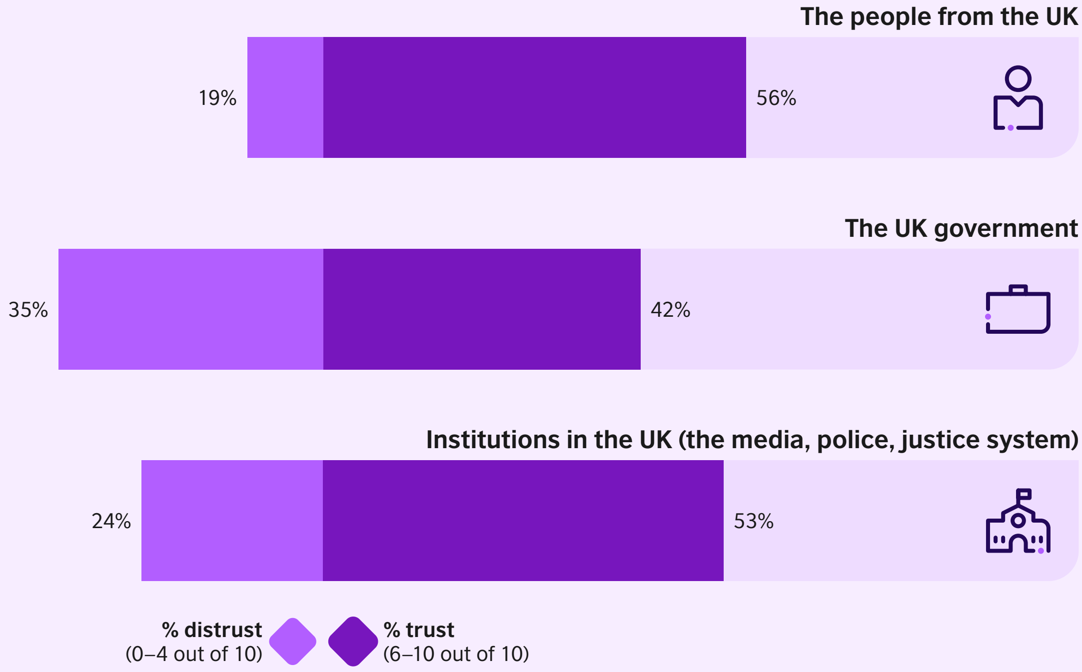



*Base: All participants in UK [2,608]*

**Figure 19. Assumed trust in UK people, government and institutions**

We'd like to ask you how you feel people from outside the UK might think about the country.

How much do you think people from other countries trust or distrust …





*Base: All participants in UK [2,608]*

# Conclusion: Global Britain

Perceptions matter. They shape attitudes, determine behaviours and drive decisions, whether that's on where we go on holiday, the brands we like and trust (and distrust) when we buy cars or clothes or cola, or indeed the countries with whom governments choose to align.

Having something people want or aspire to, being liked, respected and trusted, being known for openness and reliability – these are the traits that underlie the UK's soft power strength. Liberalism, capitalism, democracy, stability, culture, education, prosperity, a commitment to peaceful co-operation and to helping others – these qualities are why the UK's position in terms of attractiveness and trust has proven so resilient despite the disruptive forces, both internal and external, that have marked the last few years.

Challenges remain and more will no doubt emerge, but as the UK begins a new chapter it does so from a position of soft power strength. The big unknown is the impact of COVID-19 on perceptions and whether it will be temporary or lasting, but barring further problems, like the emergence of a new vaccine-resistant strain of the virus, there are reasons to be cautiously optimistic that the internationally recognised success of the UK vaccine programme will be to the UK's benefit in the medium term.

Drawing on the UK's soft power advantage, there is a logic to the UK government's pursuit of the opportunities available from closer ties with the Asian and Pacific states that will be important economic and strategic partners in the years ahead. Here the UK is seen as an attractive and trustworthy partner. Pursuing membership of the CPTPP is a shrewd move for the UK, building on existing links with Commonwealth and other old allies like Japan while enabling the fostering of connections and networks with other existing and aspirant members to whom the UK is less familiar.

Old friends in the Commonwealth in Asia, Africa, the Americas and Oceania, including the fast-expanding economies in Sub-Saharan Africa that are set to emerge as leading international markets in the future, will be much more important to the UK in the years ahead. Investing in the Commonwealth, deepening existing economic, security and cultural ties, and seeking ways to invigorate and potentially expand what remains a grossly underrated international body should be a priority.

But for all the buccaneering spirit evident in the thinking around Global Britain, there remain real challenges closer to home. The UK needs its European neighbours and they need an engaged and collaborative UK. The UK is Europe's leading military power with a pivotal role in European security. It is also a leading European economy, with the City of London especially important to the continent's continued prosperity. There is difficult but essential work needed to rebuild relations with EU states and find a mutually beneficial new normal. This is especially true with Ireland, where trust and co-operation are vital to the peace and prosperity of both countries and, crucially, to Northern Ireland.

Across Europe confidence-building measures drawing on the UK's strengths in the arts, creative industries, education, science and technology, especially where these are curated by agencies like the British Council, offer real potential to revive the connections and trust that have been disrupted by the UK's exit from the EU.

Building links with like-minded states in Europe and around the world to foster peace and prosperity will amplify UK influence internationally. Exciting ideas for new collaborative groupings of democratic states like the D10 hold real potential to increase the strategic influence and attractiveness of the UK. The evolution of the Five Eyes alliance beyond intelligence sharing to geopolitics, as seen with the response to the imposition of new national security measures in Hong Kong last year, is an interesting development, albeit one that New Zealand regrettably demurred from supporting.

Human rights advocacy and standing fast in the face of the advance of authoritarianism is an important element in the UK's international standing. At the core of the UK's international appeal is the perception that it is a force for good in the world, a country that collaborates with others, states for the common good. Emphasising the UK's credentials as a generous, open, liberal and engaged global actor that works collaboratively with others as seen with the support for COVAX and COP26, will be vital in the years ahead. The diplomatic network and international agencies like the BBC World Service and the British Council that promote international collaboration and build trust and connections will be central to success. It is also essential that the cut to the overseas aid budget is reversed as soon as circumstances allow.

The UK enjoys the respect and trust of peoples from very different cultures. It is seen as a force for good in the world. And even the countries the UK government judges to be strategic rivals and adversaries view the country with respect and afford it levels of trust that they themselves envy – and seek to emulate.

The UK's soft power advantage leaves it well placed to build alliances to tackle global threats like climate change and COVID-19. It is able to bring together states that may not share the exact same set of values but who trust the UK in a way that they do not trust other global powers. This is a precious thing born of history, culture and many years of investment and leadership in diplomacy, global security, international development and cultural relations. It grants the UK the reputational resilience to weather the squalls and swells of geopolitics. To keep calm and carry on.

But it does take a sustained commitment, something promised by the Integrated Review, but which will only prove possible if this is followed up with a substantial investment in the UK's international networks in the forthcoming spending review. The UK is a soft power superpower, first among equals in the fiercely contested soft power race. The 2020s can be a fresh start for the UK, a bright new era of prosperity and international engagement, if it invests to maintain its soft power advantage.

# Appendix 1

## Survey questions and methodological approach

These are the questions posed in the 2016, 2018 and 2020 surveys that are covered in this report.

Note that the 'countries' were presented first as a list of the G20 countries, with a second separate list comprising the additional 17 countries presented in a rerun of this suite of questions later in the survey. These countries lists excluded respondents' home state. The separating of the two groups of countries was done to guarantee backwards compatibility of the trend data on the G20 group from previous surveys.

- Thinking generally about people, to what extent do you distrust or trust people from each of these countries?
- And now thinking about government, to what extent do you distrust or trust the government from each of these countries?
- And now thinking about institutions – such as the media, police, justice system – to what extent do you distrust or trust the institutions in each of these countries?
- And taking everything into consideration, how attractive overall do you find each of the countries below?
- Which THREE of the following countries do you find MOST attractive as a country in which to study?
- Which THREE of the following countries do you find MOST attractive as a source of arts and culture (e.g. music, theatre, literature, visual arts, film, museums, etc.)?
- Which THREE of the following countries do you find MOST attractive as a country with which to do business/trade?
- Which THREE of the following countries do you find MOST attractive as a country to visit as a tourist?
- Which, if any, of these do you think are the most important issues facing the world today? Please select all that apply:
  1. Unemployment
  2. Economic growth
  3. The state of the global financial system
  4. Poverty
  5. Inequality
  6. Climate change/the environment
  7. Erosion of religious values
  8. Migration/refugees
  9. Extremism/terrorism
  10. Armed conflicts
  11. Infringements on personal freedom
  12. Discrimination in society
  13. Globalisation
  14. Political polarisation/people not being able to agree on important issues
  15. Fake news
  16. Other. Please specify ...
  17. Don't know

Note for the next question that respondents were only asked about the G20 states plus their own home country if they were from one of the additional countries included in the survey:

- And thinking about both your own country and the other countries listed below, how well do you think they support and encourage the values you think are important in the 21st century? Please select one answer.
  1. Very well
  2. Fairly well
  3. Neither well nor poorly
  4. Fairly poorly
  5. Very poorly
  6. Don't know

The last four questions covered in this report were only asked of British participants in the survey.

- How much do you think people from other countries trust or distrust people from the UK?
- How much do you think people from other countries trust or distrust the UK government?
- How much do you think people from other countries trust or distrust institutions in the UK (the media, police, justice system)?
- And taking everything into consideration, how attractive overall do you think people from outside the UK might find the country?

## Technical details of the soft power survey

The British Council commissioned Ipsos MORI to conduct the latest survey in early 2020, with fieldwork taking place between 7 February and 27 March 2020. Ipsos MORI interviewed a sample of 37,158 adults aged 18–34 across the 36 survey countries. Table 2 on page 49 gives details on the samples from each country. Interviews were conducted online in 34 of the 36 countries, and face-to-face in two countries (Pakistan and Kazakhstan).

Data has been weighted for each individual country to the known offline population proportions for age within gender, and each country has been given equal weighting within the dataset. All surveys are subject to a range of potential sources of error. Ipsos MORI has published the detailed data tables that underpin the findings of the 2020 survey on their website.[20]

Please note that in anglophone countries the survey was only offered in English, but in non-English-speaking countries the survey was presented in the official language(s) of the country.

20. See www.ipsos.com/ipsos-mori/en-uk/how-others-see-us-perceptions-uk-across-36-countries

**Table 2. Methodology and sample size by country**

| Country | Method | Sample size |
|---|---|---|
| Argentina | Online | 1,000 |
| Australia | Online | 1,000 |
| Brazil | Online | 1,000 |
| Canada | Online | 1,000 |
| China | Online | 1,002 |
| Colombia | Online | 1,000 |
| Czech Republic | Online | 1,002 |
| Egypt | Online | 1,001 |
| France | Online | 1,000 |
| Germany | Online | 1,000 |
| Greece | Online | 1,000 |
| Hungary | Online | 1,000 |
| India | Online | 1,000 |
| Indonesia | Online | 1,000 |
| Ireland | Online | 500 |
| Italy | Online | 1,000 |
| Japan | Online | 1,000 |
| Kazakhstan | Face-to-face | 1,009 |
| Kenya | Online | 1,000 |
| Malaysia | Online | 1,000 |
| Mexico | Online | 1,000 |
| Nigeria | Online | 1,000 |
| Pakistan | Face-to-face | 1,034 |
| Poland | Online | 1,000 |
| Romania | Online | 1,000 |
| Russia | Online | 1,000 |
| Saudi Arabia | Online | 1,001 |
| Singapore | Online | 1,000 |
| Slovakia | Online | 1,000 |
| South Africa | Online | 1,000 |
| South Korea | Online | 1,000 |
| Spain | Online | 1,000 |
| Turkey | Online | 1,000 |
| Ukraine | Online | 1,000 |
| United Kingdom | Online | 2,608 |
| United States | Online | 1,000 |

# Appendix 2

### Table 3. Most attractive countries over time

How attractive overall do you find each of the following countries?

G20 countries shown only since all other countries new for 2020 so no trend data available.

*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

| | 2016 (pre-ref) | 2016 (post-ref) | 2018 | 2020 |
|---|---|---|---|---|
| **United Kingdom** | = 3 | 4 ▼ | 4 | 1 ▲ |
| **Canada** | 1 | 1 | 1 | 2 ▼ |
| **Italy** | = 3 | 3 | = 2 ▲ | 3 ▼ |
| **France** | = 3 | 4 ▼ | 5 ▼ | 4 ▲ |
| **Australia** | 2 | 2 | = 2 | 5 ▼ |
| **Japan** | 8 | 7 ▲ | 7 | = 6 ▲ |
| **Germany** | 6 | 6 | 6 | = 6 |
| **USA** | 7 | 8 ▼ | 8 | = 6 |
| **Brazil** | 9 | 9 | 9 | 9 |
| **South Korea** | = 12 | 14 ▼ | = 11 ▲ | = 10 ▼ |
| **Russia** | = 12 | = 12 | 14 ▼ | = 10 ▲ |
| **Argentina** | 10 | 10 | 10 | 12 ▼ |
| **Mexico** | = 12 | = 12 | 11 ▲ | = 13 ▼ |
| **Turkey** | 15 | = 15 | = 15 | = 13 ▲ |
| **South Africa** | = 16 | = 17 | = 15 | = 15 |
| **Indonesia** | = 16 | = 17 ▼ | 17 | = 15 ▲ |
| **China** | 11 | 11 | = 11 | 17 ▼ |
| **India** | = 16 | = 15 ▲ | 18 ▼ | = 18 |
| **Saudi Arabia** | 19 | 19 | 19 | = 18 ▲ |

### Table 4. Trust in people of different countries over time

Thinking generally about people, to what extent do you distrust or trust people from each of the following countries?

G20 countries shown only since all other countries new for 2020 so no trend data available.

*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

| | 2016 (pre-ref) | 2016 (post-ref) | 2018 | 2020 |
|---|---|---|---|---|
| Canada | 1 | 1 | 1 | 1 |
| United Kingdom | = 2 | = 4 ▼ | = 2 ▲ | 2 |
| Japan | 5 | = 4 ▲ | 4 | 3 ▲ |
| Australia | = 2 | 2 | = 2 | 4 ▼ |
| Germany | 4 | 3 ▲ | 5 ▼ | 5 |
| Italy | 7 | 6 ▲ | 7 | 6 ▲ |
| France | 6 | 6 | 6 | 7 ▼ |
| USA | 8 | 8 | 8 | 8 |
| South Korea | = 9 | 9 | 9 | 9 |
| South Africa | = 13 | = 14 ▼ | 13 ▲ | 10 ▲ |
| Russia | = 13 | = 14 ▼ | 14 | 11 ▲ |
| Brazil | = 9 | 11 ▼ | = 10 ▲ | = 12 ▼ |
| Turkey | 18 | = 17 ▲ | = 17 | = 12 ▲ |
| Indonesia | = 16 | 16 | = 15 ▲ | 14 ▲ |
| Mexico | = 16 | = 17 ▼ | = 15 ▲ | = 15 |
| Argentina | 11 | 12 ▼ | = 10 ▲ | = 15 ▼ |
| China | 12 | 10 ▲ | 12 ▼ | 17 ▼ |
| India | 15 | 13 ▲ | = 17 ▼ | 18 ▼ |
| Saudi Arabia | 19 | 19 | 19 | 19 |

### Table 5. Trust in the government of different countries over time

Thinking generally about government, to what extent do you distrust or trust the government from each of the following countries?

G20 countries shown only since all other countries new for 2020 so no trend data available.

*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

| | 2016 (pre-ref) | 2016 (post-ref) | 2018 | 2020 |
|---|---|---|---|---|
| **Canada** | 1 | 1 | 1 | 1 |
| **Germany** | = 3 | 3 | 3 | 2 ▲ |
| **United Kingdom** | 2 | 4 ▼ | 3 ▲ | 3 |
| **Japan** | 6 | 5 | 5 | 4 ▲ |
| **Australia** | = 3 | 2 ▲ | 2 | 5 ▼ |
| **France** | 5 | 6 ▼ | 6 | 6 |
| **Italy** | 8 | 7 ▲ | 7 | 7 |
| **South Korea** | 9 | 9 | 8 ▲ | = 8 |
| **USA** | 7 | 8 ▼ | 9 ▼ | = 8 ▲ |
| **Russia** | 11 | = 11 | = 10 ▲ | 10 |
| **Turkey** | 15 | = 14 ▲ | 14 | 11 ▲ |
| **South Africa** | 14 | = 14 | 15 | 12 ▲ |
| **Saudi Arabia** | 19 | 19 | 19 | = 13 ▲ |
| **Indonesia** | = 17 | 17 | = 16 | = 13 ▲ |
| **Mexico** | 15 | 14 ▲ | = 16 ▲ | = 15 ▲ |
| **Brazil** | 13 | 13 | = 12 ▲ | = 15 ▼ |
| **Argentina** | 10 | 12 ▼ | = 10 ▲ | = 17 ▼ |
| **China** | 12 | 10 ▲ | = 12 ▼ | = 17 ▼ |
| **India** | = 17 | = 17 | 18 ▼ | 19 ▼ |

**Table 6. Trust in the institutions of different countries over time**

Thinking generally about institutions (such as the media, police, or justice system), to what extent do you distrust or trust the institutions in each of the following countries?

G20 countries shown only since all other countries new for 2020 so no trend data available.

*Base: All participants in the G20 asked about each country [c. 4,000 per country, 18,004 asked about the United Kingdom]*

| | 2016 (pre-ref) | 2016 (post-ref) | 2018 | 2020 |
|---|---|---|---|---|
| **Canada** | 1 | 1 | 1 | = 1 |
| **United Kingdom** | 2 | = 2 | 2 | = 1 ▲ |
| **Germany** | 3 | = 2 ▲ | 3 ▼ | 3 |
| **Japan** | 6 | 5 ▲ | 5 | 4 ▲ |
| **Australia** | 4 | 4 | 4 | 5 ▼ |
| **France** | 5 | 6 ▼ | 6 | 6 |
| **USA** | 7 | 7 | 8 ▼ | 7 ▲ |
| **Italy** | 8 | 8 | 7 ▲ | 8 ▼ |
| **South Korea** | 9 | 9 | 9 | 9 |
| **Russia** | 10 | = 10 | 10 | 10 |
| **Turkey** | = 14 | = 16 ▼ | 13 ▲ | 11 ▲ |
| **China** | 12 | = 10 ▲ | 12 ▼ | 12 |
| **Saudi Arabia** | = 16 | = 14 ▲ | 18 ▼ | = 13 ▲ |
| **South Africa** | = 14 | = 16 ▼ | = 15 ▲ | = 13 |
| **Argentina** | 11 | 12 ▼ | 11 ▲ | = 15 ▼ |
| **Indonesia** | 18 | 18 | = 16 ▲ | = 15 ▲ |
| **Mexico** | = 16 | = 14 ▲ | = 16 ▼ | 17 ▼ |
| **Brazil** | 13 | 13 | 14 ▼ | 18 ▼ |
| **India** | 19 | 19 | 19 | 19 |

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