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Global Perceptions 2023

How 18–34 year olds
see the UK and the world



Contents

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The British Council is the United Kingdom's international organisation
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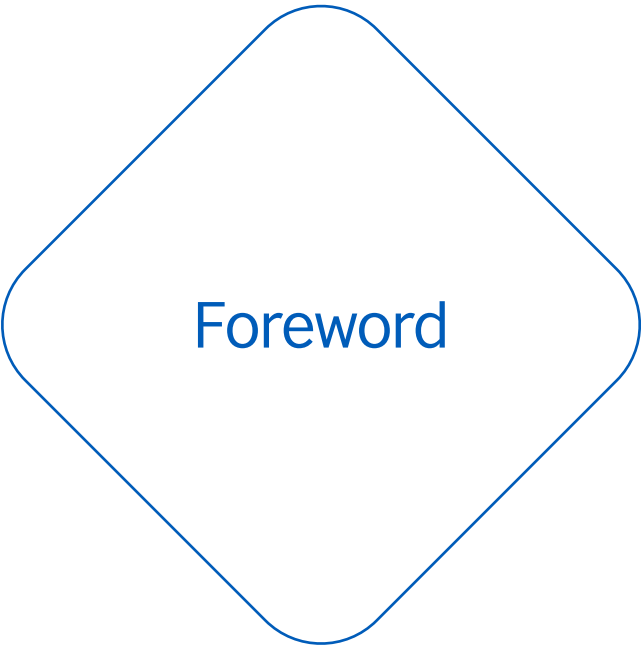
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We are living through difficult times – dangerous and disturbing times, in many parts of the world. Conflict and violence threaten the established Rules Based International System (RBIS) that – for all its faults – has delivered unprecedented global peace and prosperity.

In an increasingly volatile world, the United Kingdom has a vital role to play as a source of stability and security.

The UK has been described as a ‘soft power superpower’, and our ability to act as a trusted international partner and intermediary is a powerful counterpart to our other capabilities – economic, political and military.

The way we act in the world, and the influence we bring to bear on the challenges facing the international community, will determine our ability to shape the future – not just for our own benefit, but for the good of all.

Our new report, *Global Perceptions 2023: how 18–34 year olds see the UK and the world*, confirms that the UK continues to be seen as one of the most trusted states in the G20 group of nations, and a force for good in the world.

The values of the UK – including the civil and political freedoms that we all too often take for granted – are central to that reputation. Honesty, equality, decency and respect are the building blocks of UK society. They form us as a country, but they are also critically important to peace and prosperity more widely.

Our new report explores young people’s perceptions of the world’s great economic powers, the G20 group of nations. We know that young people – the leaders of tomorrow – prize equality, freedom, sustainability, peace, and diversity. And we know they look positively at the open, free and liberal democracies that exemplify these values: countries like Australia, Canada, Germany and the UK.

The report’s headline findings on attractiveness, trust and influence in the world make this clear, and they are to be welcomed. But if we look at the data in greater detail, a more complex picture is revealed. The report highlights how slender the UK’s lead over the other liberal democracies is. Italy has already overtaken the UK and with only the tiniest of margins separating first and seventh place in the rankings for overall attractiveness, the UK could easily find itself overtaken by other countries like Canada and Japan. The data accumulated from successive surveys provides valuable lessons, showing that there are no guarantees the UK’s position will remain as strong in future.

The report shows that attitudes towards the UK in Europe have recovered from the fallout of the vote to leave the European Union – a very welcome development. The UK is also seen as a valued, trusted partner in Commonwealth countries and in states across the Indo-Pacific.

However, to negotiate the increasing instability and conflicts of the 2020s, we will need to redouble our engagement with the regional and global powers whose actions will determine whether the coming multipolar era will be marked by order or chaos. One thing is certain: the competition for power and influence is going to be fierce.

It would be easy to become dispirited in the face of the challenges facing the world today. But despite the horrors of the last few months, there is still hope for a better future. It will take courage and effort to win the battle for hearts and minds and secure a brighter, more peaceful and equitable tomorrow – but it can be done.

For the UK, that means building on the strategy laid out in the UK Government’s Integrated Review Refresh to unlock the country’s potential as a ‘smart power superpower’. A country that maximises its international influence by effectively deploying the many levers available to it, whether they be economic, diplomatic, military, social or cultural.

But to meet the challenges of this new era, it is essential to increase investment in the overseas networks and institutions that are central to the UK’s international attractiveness and trustworthiness.

These assets include the diplomatic network, the British Council and the BBC World Service, but also the cultural and educational institutions that are such a strong part of the UK’s global appeal.

Our commitment to international development plays a significant part in shaping positive attitudes towards the UK. Making good on the promise to return to previous levels of foreign aid will therefore be important. Last but by no means least, it requires an approach to international relations that is rooted in the nation’s values and demonstrates a commitment to the RBIS, to multilateralism and global progress on human rights, and to international issues like climate change and poverty reduction.

There is work to be done. But by engaging openly and constructively with the world and continuing to act honestly and collaboratively with others, I believe the UK can successfully chart a way to a more optimistic future.



Scott McDonald
Chief Executive



Executive summary

Confronted with the horrors of war and the numerous and continual terrorist atrocities in Africa and the Middle East, it may seem naive or even crass to talk about the importance of soft power. Yet in an increasingly complex, unstable and violent world, where revanchist powers and non-state actors seek to shatter the status quo, soft power is more vital than it has been in the past. Winning the battle for hearts and minds has always been an important priority in both war and peace, something that has been powerfully demonstrated in the Russo-Ukrainian War where winning the information war has been recognised as critical to securing Western aid and materiel.

Soft power is an essential element in international relations. Trust, the currency of soft power, binds and strengthens communities both within a country and across international borders. It plays a critical role. Where there is trust, conflict is less likely to occur and when it does, trust can provide a platform to de-escalate before conflict turns violent. In the absence of trust, states will inevitably act in their own narrow self-interest, either defensively, or with aggression. Recent history suggests that we are entering a new multipolar era with regional and global powers growing increasingly assertive. Indeed, this new self-assertion is likely to prove a defining feature of the next decade.

This new era is highly volatile. The RBIS that has delivered unprecedented peace and prosperity is being sorely tested. The world could easily descend into a brutal zero sum game. Western governments will have to adapt to navigate the added uncertainty and complexity this brings. This will require a strategic, holistic and nuanced approach to international affairs.

A state's hard power will always be important, but if we are to renew the RBIS, and maintain the unprecedented peace that much of the world has experienced in the last seven decades, we will need to win the support of others through soft power – the power of attraction.

To successfully negotiate this new geopolitical complexity, it is crucial to be recognised as a reliable, trustworthy partner. The UK enjoys a strong position relative to its rivals – the British Council's latest edition of the Global Perceptions study which surveys the opinions of 18–34 year olds from the G20 group of nations reveals it is a highly attractive, trusted global actor. It is seen as a more positive influence in the world than any other G20 state. However, the data also reveals that soft power is an increasingly competitive field with both established and emerging challengers seeking to be the next 'soft power superpower'. The fierceness of that competition is reflected in the UK's passing of the crown of 'most attractive country in the G20' on to Italy after coming first in the last two surveys.

In formulating its strategic response to a more competitive, contested multipolar era, it is important that the UK does so with a comprehensive understanding of the citizenry of the states it seeks to engage and influence. Public opinion provides important context for official bilateral engagement between countries. Perceptions shape behaviours and decisions. The findings in the British Council's Global Perceptions study offer essential insights into the relative standing of both the UK and the world's other leading powers.

The headline findings from 2023 are:

- The UK is now ranked second for overall attractiveness, but its rating is higher than in 2021 and also exceeds the score it had in 2016 before the vote to leave the European Union.
- The UK averages second for trust in the G20, but its position is strengthening and on current trends it is well placed to overtake Canada to become the most trusted country in the G20.
- The UK is in an especially strong position in Commonwealth countries.
- Positive data from countries across Asia supports the UK Government's 'Indo-Pacific tilt' strategy.
- The UK's position in Europe appears to have recovered from the volatility that has been a standout feature of the Brexit period.
- Cultural and educational exchange plays an important role in positive perceptions of the UK.
- Where cultural and education exchange is curated by the British Council, trust towards the UK government is 15 percentage points higher.

Russia's full-scale invasion of Ukraine appears to have severely damaged its international reputation. Barring a few notable exceptions, Russia has seen a sharp decline in perceptions across the G20, likely reflecting young people's feelings about the War. The data from the study highlights the importance of values in international relations. With 'working for a peaceful world, ending armed conflict' one of the most important values to 18–34 year olds, it is not surprising that they identify Russia as the only G20 country that is a NET negative influence in the world.

The data also reveals that while the rich, liberal, capitalist democracies – essentially the G7 plus Australia and the Republic of Korea – continue to be the most highly regarded states in the G20, other countries are significantly increasing their standing. Türkiye's rating for attractiveness has risen by 15 percentage points since 2016. Successive surveys have shown the importance of perceptions of relative wealth and political and civil freedoms to the ratings but, in 2023, the prominence of values seems to be even more pronounced with the upper middle income democracies and hybrid states¹ in the G20 increasing their ratings while the reputation of some authoritarian states appears to be stagnating.

The UK is a world leader in soft power, but as the data clearly show, the competition for influence is closer than ever. There is no room for complacency. There are others – friends and rivals alike – all too ready to seize the advantages the UK currently enjoys. Increased investment in the diplomatic network and international organisations like the BBC World Service and the British Council will be vital. As will increased support for the UK's cultural and educational institutions that contribute so mightily to the country's international reputation. 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, and a valued, trusted partner in the fight against global challenges like climate change, but maintaining its leading position requires continual vigilance and engagement.

¹ Academics deploy a diverse range of terms to describe the "grey zones" between full autocracies and full democracies, including competitive authoritarianism, illiberal democracy and hybrid democracy. For the purposes of this report the term hybrid state is used.



Introduction

At a time of growing global instability and competition *Global Perceptions 2023: how 18–34 year olds see the UK and the world* delivers critical insights into the international standing of the world's leading powers. We asked young people from 18 G20 member states how they view the other countries in the G20, focusing on a range of metrics that collectively generate a detailed picture of each country's international influence and leverage. This report details the soft power of the different states in the G20 as of June–July 2023 (i.e., when the fieldwork was undertaken). Crucially, the study also provides the means to track how attitudes have shifted and changed over time through comparison with previous surveys, with the first comparable study being undertaken in the spring of 2016. We can trace how the relative international standing of the G20 member states have evolved over the past seven years.

Soft power is elusive and intangible, and yet it is a highly influential force in international relations that shapes the choices and actions of states on matters vital to global security and prosperity. It is core to a state's international influence, combining with, amplifying, and legitimising its hard power. Measuring soft power has proven a conundrum for academics and policy makers. There is no direct equivalent of the established measures of hard power, like GDP per capita or the number of fifth-generation fighters a country has in its hangars. A wide range of methods have been deployed to assess states' soft power, including quantitative and qualitative approaches. The various indices of soft power, such as the Soft Power 30,² that set out to measure and rank states' international appeal, draw on everything from data for levels of foreign direct investment (FDI), international student flows and tourist arrivals, to Olympic gold medals and Michelin starred restaurants.

To get a more complete picture, those Olympic medal tallies and numbers of tourist arrivals are usually supplemented by data from polling that seeks to capture people's perceptions of these 'soft power superpowers'.³ This is the core approach of Brand Finance's Soft Power Index.⁴ What makes these perceptions so important is how they drive people's behaviour. We experience this in our everyday lives. We make choices about what we buy, eat, watch, wear and do on the basis of our perceptions. We visit the places that interest us; we go to the events that excite, entertain and inspire; and we spend time with those who we love, and avoid those we dislike. These decisions are determined by levels of attraction but also the confidence and trust born of past experiences, and values – both our own and those of the people, companies and institutions with which we engage. Perceptions of attractiveness, trust and values also influence who and what we choose to support and oppose. We take a side, whether that's in the terraces at the local derby or on the great issues of the day, based on our views and feelings towards the opposing 'teams'. Personal preferences and expectations – both our own but also those with whom we would associate and esteem – play a crucial role in these vital decisions. It is important to understand that these sentiments may be frivolous or profound. And sometimes they might appear misplaced, unfair, wrong or even outright evil from another's perspective.

Similar dynamics are at play at the state level. The most attractive, trusted and respected states tend to be the places that draw tourists, FDI and students, but they also have influence in global fora. Soft power influences, supplements and amplifies the leverage the world's most powerful states have. Votes in the UN General Assembly,⁵ for example, tend to favour the Western powers rather than other leading global actors. Decisions on matters of state, such as signing a trade deal, are also influenced by assessments of attractiveness and trust, including public opinion. Of course, the size of a country's market matters, but so does the extent to which that country's government can be trusted to deliver on their treaty commitments. Logically, a state that is viewed as trustworthy will generally be preferred as a geopolitical partner and ally. It is also more likely to be believed and supported in its international activities, and it is in a stronger position to build coalitions to take collective action on the issues of the day. Consequently, measuring perceptions is essential to understanding the soft power of leading nations like the UK and the other member states of the G20. It is important to understand and track the relative attractiveness and trustworthiness of different states, as they are a proxy for these countries' international influence and leverage.

We are living in a new era of increasing competition for influence. The world with the United States as a global hegemon, or of a bipolar world dominated by the two twenty-first century superpowers, appears to be transitioning to a more complex, multipolar order. Whether we are already in a multipolar world or not is hotly contested by international relations experts.⁶ What we are seeing is increasing global instability, volatility and conflict. Global and regional powers – old and new – are increasingly asserting themselves in pursuit of their own interests. State and non-state actors are challenging the status quo, sometimes with murderous brutality. The world is increasingly contested, and the established RBIS – with its complex set of overlapping rules, institutions and norms of behaviour – is being tested in ways unseen since its inception. If the RBIS is to survive war, contemporary terrorism and a host of new and existing fault lines, the world's leading nations need to stand together, united. It might seem that hard power is the only response to revanchist expansionism and the terrorist fanatics, but unity of purpose and what was once referred to as the 'battle for hearts and minds' are also essential. Strength of arms – and deep pockets – might win battles, but building lasting peace and avoiding armed conflict altogether, is where soft power takes a central role.

The British Council has been regularly surveying the views of young people from across the G20 group of nations since 2012; the survey in its current form was first launched in 2016 and forms our baseline. The focus on youth voices distinguishes the Global Perceptions study from other international soft power surveys and indices. It is vital to understand what the leaders of tomorrow think of the world as they will be making the decisions that shape the future of our planet.

For this 2023 edition Ipsos UK surveyed 19,601 educated young people (aged between 18 and 34) across 18 countries in the G20⁷ for the British Council. The fieldwork was undertaken in June and July 2023. Unlike in previous iterations of the survey, Ipsos UK did not undertake fieldwork in Russia as a result of the sanctions regime, and the risk to potential participants. Where we draw upon trend data from previous surveys in this report, some caution should be exercised. However, analysis of the 2021 G20-wide average results with and without Russian participants included found that differences were very minimal. It is worth noting that while we do not have 2023 survey data from Russia, we do have the views of young people from the other 18 G20 member states towards Russia.

This report focuses primarily on the trend data from the G20, looking at the average of participants' results from across the member states, with additional trend data from individual countries included to provide further insight where appropriate. The scores are expressed in percentage points and accompanied by rankings to highlight change over time. Note that this approach does bring to the fore cultural differences that affect ratings. For example, young adults in Japan generally tend to avoid the extremes when participating in surveys, so when given a Likert 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 these cultural differences.

Throughout this report, unless otherwise stated, the data presented has been provided by Ipsos UK (2016a and 2016b, 2020, 2021 and 2023 surveys) and GfK Social and Strategic Research (2018). The interpretation and analysis of the datasets are the authors' 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 the Appendix on page 70.

² <https://softpower30.com/>

³ Alistair MacDonald, "Soft Power Superpowers," British Council (2018), https://www.britishcouncil.org/sites/default/files/j119_thought_leadership_global_trends_in_soft_power_web.pdf

⁴ <https://softpower.brandfinance.com/2023/globalsoftpowerindex>

⁵ Stuart MacDonald and JP Singh, "Soft Power Today: Measuring the Influences and Effects," British Council and University of Edinburgh (2017), https://www.britishcouncil.org/sites/default/files/3418_bc_edinburgh_university_soft_power_report_03b.pdf

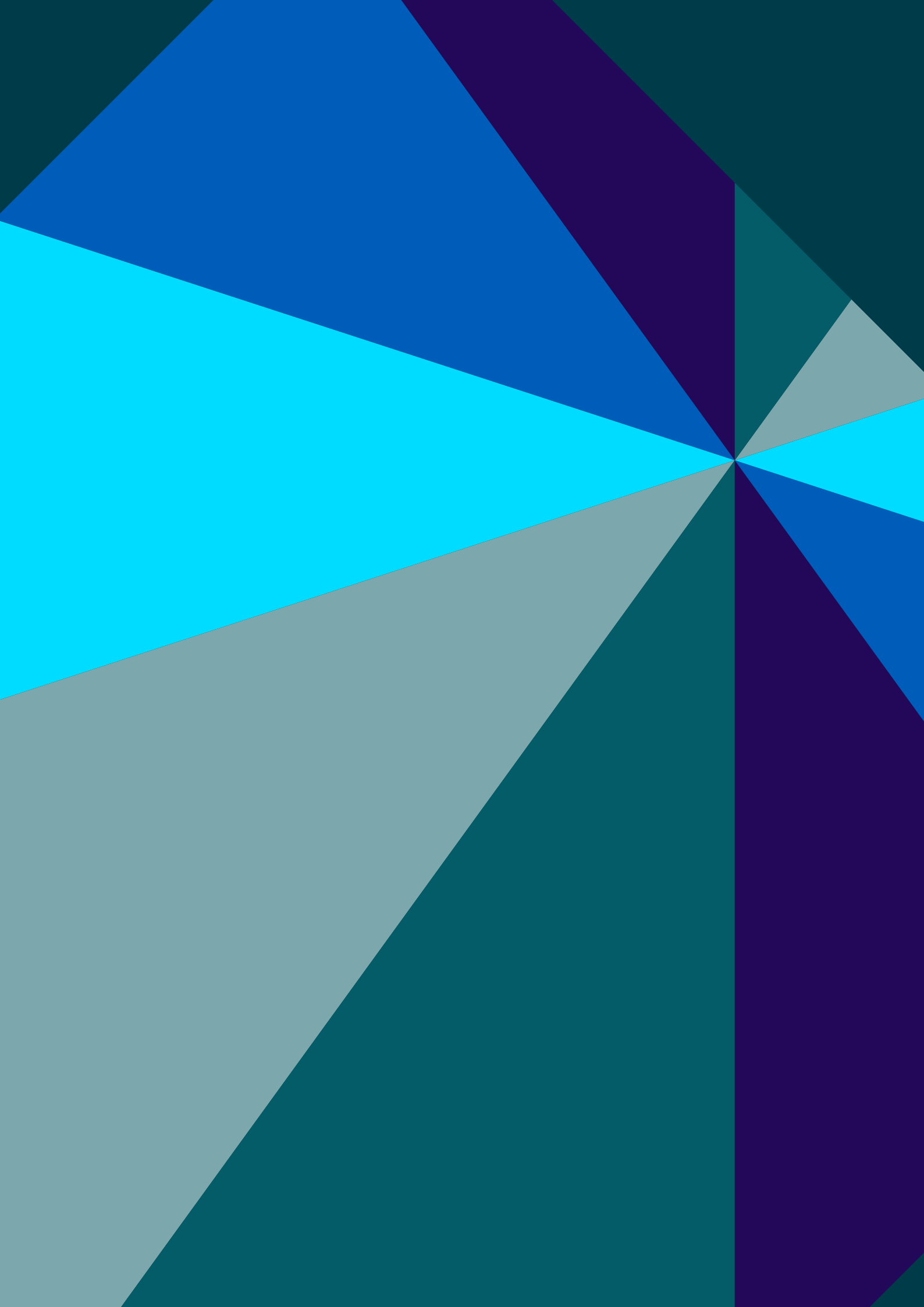
⁶ For insight into this debate see Emma Ashford and Evan Cooper, "Yes, the World Is Multipolar: And that isn't bad news for the United States," Foreign Policy (2023), <https://foreignpolicy.com/2023/10/05/usa-china-multipolar-bipolar-unipolar/>; and Jo Inge Bekkevold, "No, the World Is Not Multipolar: The idea of emerging power centers is popular but wrong—and could lead to serious policy mistakes," Foreign Policy (2023), <https://foreignpolicy.com/2023/09/22/multipolar-world-bipolar-power-geopolitics-business-strategy-china-united-states-india/>

⁷ Argentina, Australia, Brazil, Canada, China, France, Germany, Greece, India, Indonesia, Italy, Japan, Mexico, Kingdom of Saudi Arabia (KSA), South Africa, the Republic of Korea, Türkiye, UK and USA

Section 1

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







The world's most influential powers

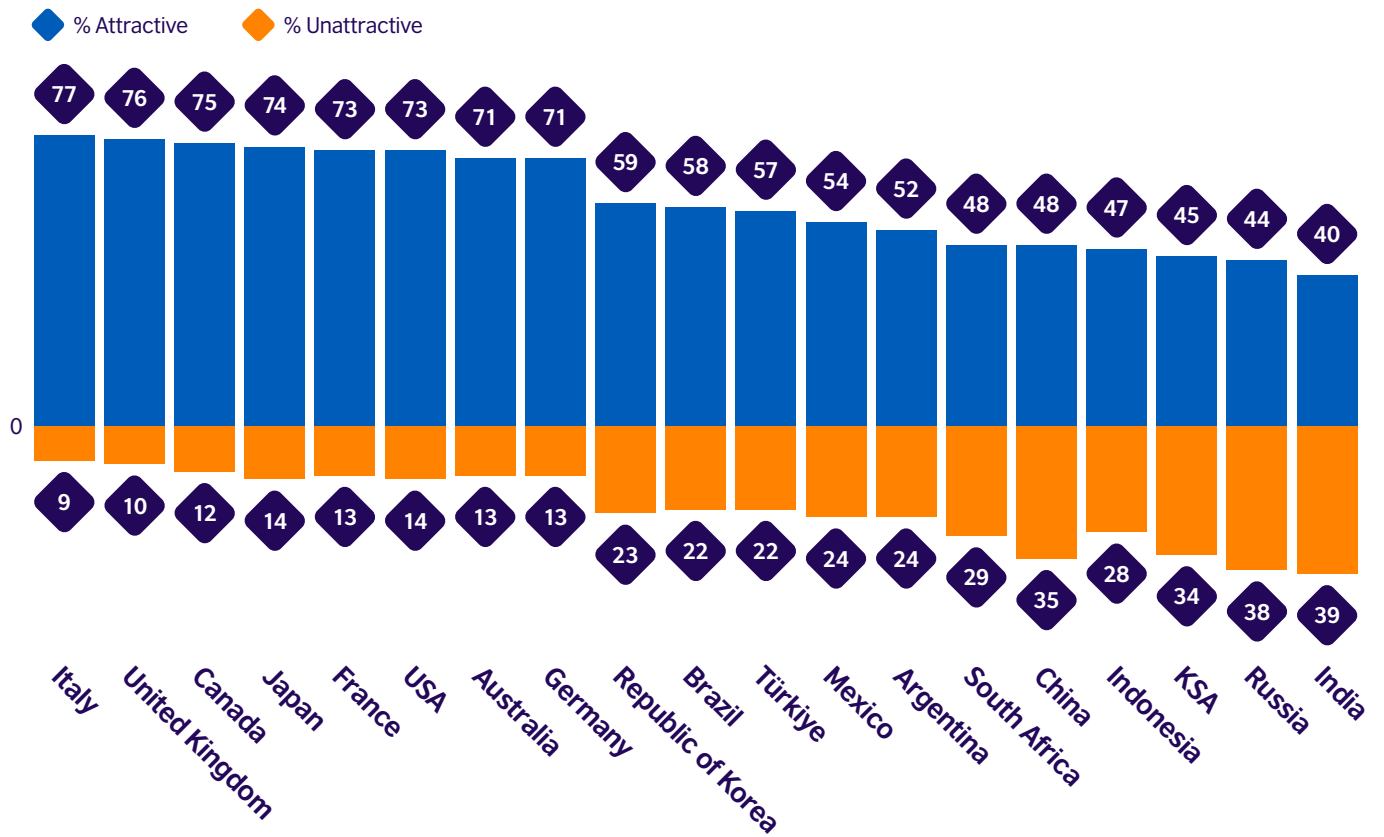
In 2023, the most attractive country in the G20 was Italy, with a rating of 77% (a rating of between 6-10 out of 10 for overall attractiveness), with the UK just behind in second place on 76%. Canada comes a close third on 75% (figure 1 on page 15). The UK's score for overall attractiveness was higher in 2023 than in 2021,⁸ suggesting the UK's position is strengthening if marginally less so than Italy – the two countries were neck and neck in 2021 on 75%. The UK's rating is also higher than the score recorded in spring 2016, where 71% of educated young people across the G20 rated the UK between 6-10 out of 10 for overall attractiveness. Back then, the UK came joint fourth for overall attractiveness with France, behind Canada (74%), Australia (72%) and Italy (also on 71%, but with a marginally lower score for unattractiveness which put it ahead of the UK and France). The respective ranks and ratings for France and Australia in 2023 were fifth (73%) and seventh (71%) (see figure 2 on page 16 to see how the top five has evolved over time).

While the UK is undoubtedly in a strong position with regards to attractiveness, the difference between first and seventh place in the ratings is a mere six percentage points.

The UK's high ranking is therefore by no means guaranteed to hold in future. The Australian experience is important here – its ranking for overall attractiveness has dropped from second to seventh even though its rating has only fallen by two percentage points. While the year on year changes in the scores are modest, the closeness of the ratings does mean it is possible for a country to move several places up or down the rankings through only a slight change in either their ratings and/or those of their peers. Interestingly, there is a wider gap of 12 percentage points in the ratings between Australia and Germany (in joint seventh place at 71%) and the Republic of Korea in ninth place (59%). For the remainder of the ratings the difference between individual countries narrows once again, varying between one and four percentage points. Simply, there is a clear pack of frontrunners jostling for the top spot. The wealthy, liberal, capitalist democracies – the G7 plus Australia – lead the ratings and the lower half of the rankings are occupied predominantly by the middle income G20 countries.

Figure 1: G20 states and attractiveness 2023

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



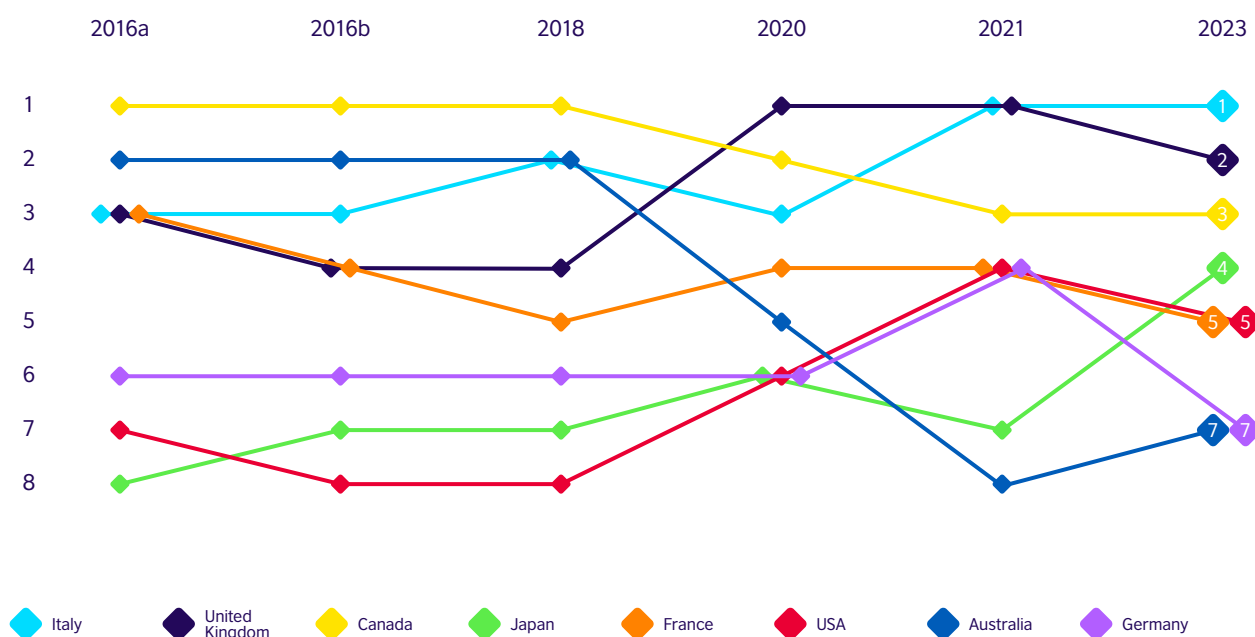
Base: All participants in the G20 asked about each country [c. 4,000 per country, 17,001 asked about the United Kingdom].
Participants were not asked about their own country.

That gap in the overall attractiveness ratings between the high scoring Western states and the others is significant and has been a consistent feature over time, even as the ratings and rankings of individual states has shifted. In early 2016, the gap between then eighth placed Japan and ninth placed Brazil was 13 percentage points (66% versus 53%). However, the ratings for the Republic of Korea have been rising consistently and it is possible, and, on current trends, likely, that it will join that group at some point in the future. Its rating in spring 2016 was 44% – it has already risen by 15 percentage points. Whether it will be the case that the gap closes further is more difficult to predict. It may be that the Republic of Korea will leap across to leave us with a top nine instead of the top eight we have had to date. However, other states have also shown strong growth over time: Türkiye (42% in 2016 and 57% in 2023) and Mexico (44% in 2016 and 54% in 2023). This suggests that we may see a greater convergence in the ratings and an even more competitive future in the years ahead.

The scores for the other five permanent members of the United Nations Security Council (the P5) are worth noting: 73% for both France and the USA, 48% for China and 44% for Russia. In the 2023 survey France, the UK and USA all scored more highly than they did in spring 2016 (where the USA rated 67%). In contrast, both China's and Russia's scores appear static – China scored 46% in spring 2016, Russia 44%. However, in terms of rankings, China has slipped from 11th in the 2016 study to a low of 17th in 2020, followed by a slight recovery to 15th in 2021 and 14th in 2023. Russia was 12th in 2016; as recently as 2021 it ranked 10th (with its rating having risen over time to 54%) only to fall to 18th place with a rating slip in 2023. This loss of rank is as much a story of the above noted strengthening of the position of countries like Türkiye and the Republic of Korea as it is a reflection of perceptions towards Russia and China. However, the sharp fall in Russia's rating – ten percentage points in two years – is striking. Typically, any change in the average ratings is gradual, so the sudden shift in attitudes towards Russia is highly unusual and can reasonably be attributed to widespread dismay at Russia's full scale invasion of Ukraine. We will return to this in more depth later in this report.

Figure 2: Changing attractiveness rankings 2016-2023

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, 17,001 asked about the United Kingdom]. Participants were not asked about their own country.

^a This report regularly compares the research findings of different waves of the Global Perceptions study. Differences in the data can appear due to random variations in the samples. However, a significance test gives an indication of the strength of the difference we have seen in this data, relative to the natural variation we would expect when working with samples of this size. Due to the large base sizes reported, only a small change in the data is needed for results to show as significantly different.



The value of trust

While a useful proxy for soft power, focusing on attractiveness can only ever provide a limited view of a country's soft power. Attractiveness, as defined by Professor Joseph Nye who coined the term 'soft power' in the late 20th century,⁹ encompasses everything from a country's form of government to the effects of megabrands like McDonalds and Nike. It includes a broad swathe of factors that range from the sacred to the profane. While it can be associated with feelings of genuine warmth, respect and understanding, it can also be consumerist, transactional and superficial. In today's hyper connected world, where a tweet can end a career, attractiveness can be a fickle, superficial thing on which to hang your fortunes, especially when we are considering the security, prosperity and influence of great powers.

However, tracked as one of a suite of metrics, attractiveness becomes much more useful. The Global Perceptions study also considers other factors to build up a more complete picture of a country's soft power. Key amongst these is 'trust'. Where attractiveness can be ephemeral, trust is deeper, more meaningful and lasting. It is heartfelt and has a resilience, a 'stickiness', that attractiveness alone can lack. As we all know in our personal lives, it takes time to build trust, to earn the credibility and loyalty that comes from shared experience. A betrayal of trust casts a long, dark shadow that may take years to overcome. We all value trust in our personal relationships. It matters equally to the security and prosperity of nation states.

British Council research⁹ has found that trust is strongly associated with interest in engagement, whether it's to do business or trade with a country, to study there or to visit:

... Those who trust the UK are roughly twice as likely to want to do business or trade, study, experience UK arts and culture or visit as a tourist than those who do not trust the UK. Looking specifically at intentions to do business or trade or to study – areas of particular importance to the UK economy – 15% of respondents who said they trust people from the UK said they intend to do business/trade with the UK, compared to just eight per cent who said they do not trust people from the UK... Some 21% of respondents who said they trust people from the UK said they intend to study in the UK, compared to only 12% of those who said they do not trust UK people.¹¹

Beyond the critical impact on FDI and student and tourist flows, trust also plays a profound role in inter-state relations. Our research¹² has explored the role of trust in enabling state-to-state co-operation. If two or more countries trust one another, they are far more likely to enter into trade and security alliances.

⁹ Joseph Nye, "Soft Power: The Means to Success in World Politics," Public Affairs (2005)

¹⁰ Alice Campbell-Cree and Mona Lotten, "The Value of Trust," British Council (2018), https://www.britishcouncil.org/sites/default/files/the_value_of_trust.pdf

¹¹ Ibid

¹² Sam Wrighton, "Trust in international relations, public diplomacy and soft power," British Council (2022), https://www.britishcouncil.org/sites/default/files/trust_in_international_relations_public_diplomacy_and_soft_power.pdf

Where trust is high, parties are more willing to take risks, to be open to working together on areas of even the highest sensitivity, as we have seen in the development of the AUKUS partnership between Australia, the UK and United States, or the long established ‘Five Eyes’ security alliance between the three AUKUS states, plus New Zealand and Canada. Conversely, parties are far more likely to act defensively, sometimes literally so by increasing defence spending, when trust is lacking.

Global Perceptions 2023 looks at three trust metrics: trust in people, trust in government, and trust in institutions (by which we mean the media, police, justice system, etc.). The UK and Canada lead the field in ‘trust’. The results for the top three highest scorers in each category in 2023 were:

- Trust in people (see figure 3 below): Canada 62% (i.e., a rating of between 6-10 out of 10), with the UK and Japan in joint second on 61%.
- Trust in government (see figure 4 on page 20): Canada 55%, UK 54% and Germany 50%.
- Trust in institutions (see figure 5 on page 21): UK 58%, Canada 56% and Japan 55%.

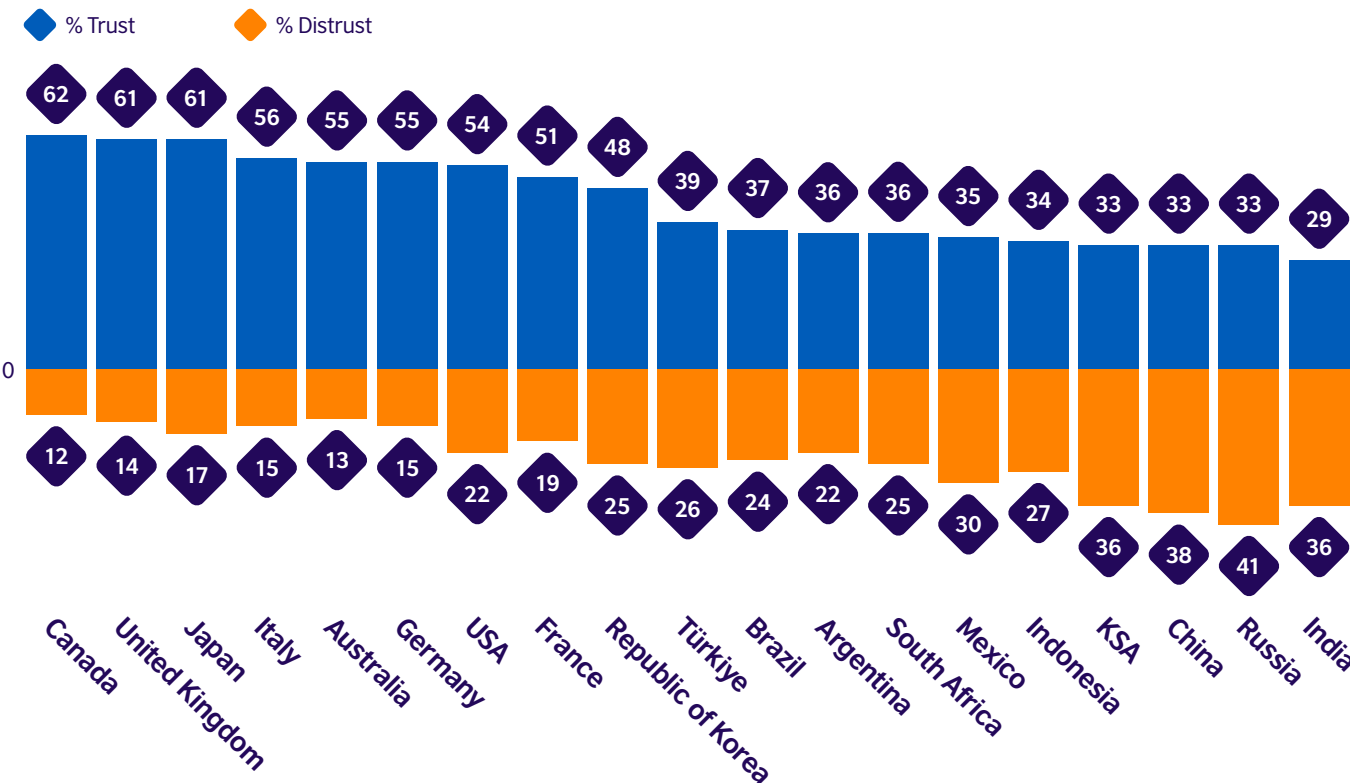
While it performs strongly for attractiveness, Italy’s ratings for trust are significantly lower than the UK’s. For trust in people, Italy is fourth, on 56%, but it is seventh for both trust in government (on 45%) and for trust in institutions (49%).

The UK’s ratings have proven remarkably resilient over time. The respective ratings in spring 2016 were:

- Trust in people: Canada 66%, UK 62% and Japan 59%. However, Japan was actually fifth on this metric in 2016, behind Australia (62%) and Germany (61%).
- Trust in government: Canada 61%, UK 55% and Germany 53%.
- Trust in institutions: Canada 61%, UK 59%, and Japan 52%. Japan was ranked sixth for this metric in 2016, behind Germany (57%), Australia (56%) and France (54%).

On current trends there is a real possibility that the UK could overtake Canada as the most trusted nation in the G20, but, as we have seen with the attractiveness ratings, this is not guaranteed. While Canada’s position across all three trust metrics appears to be weakening, the UK may find itself challenged in turn by the growing respect for Japan revealed by the trend data.

Figure 3: Trust in people
Thinking generally about people, to what extent do you distrust or trust people from each of the following countries?



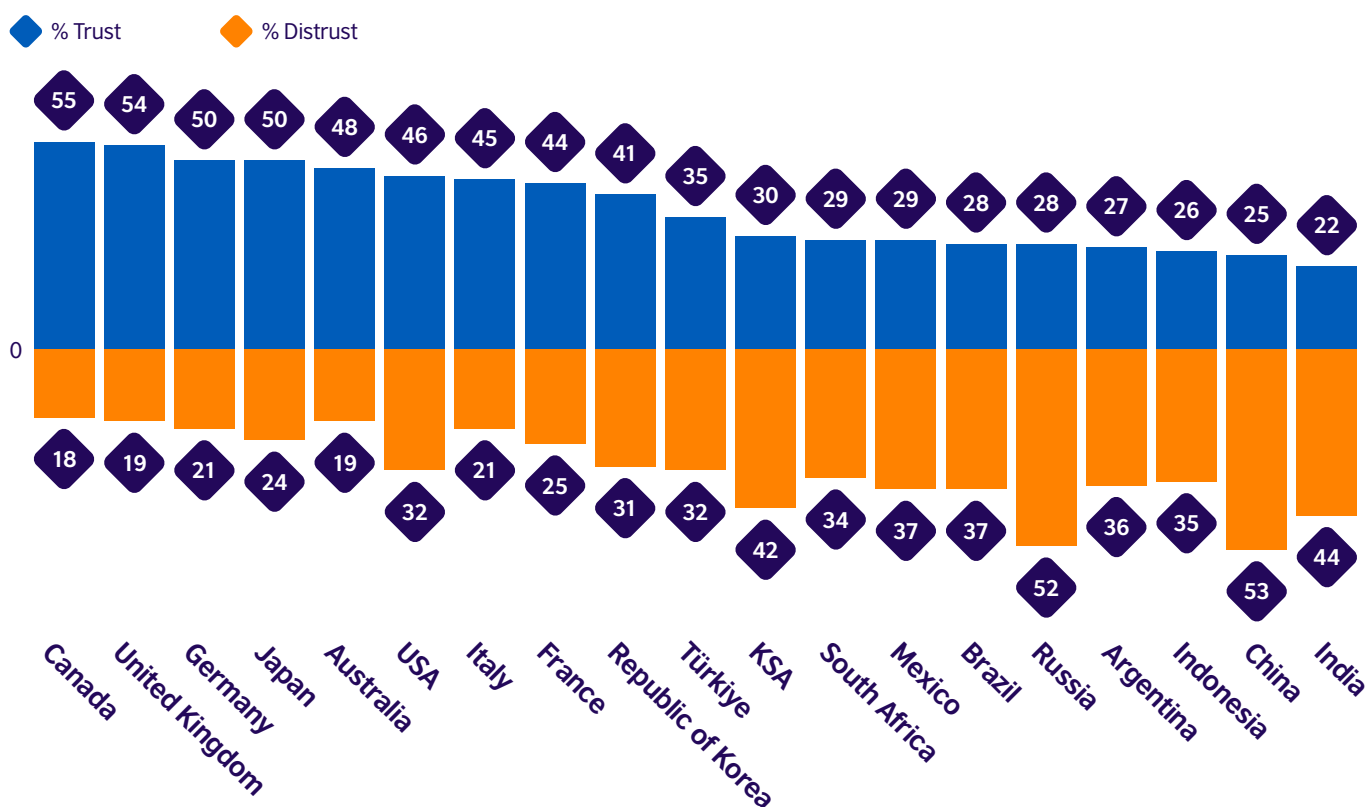
Base: All participants in the G20 asked about each country (c. 4,000 per country, 17,001 asked about the United Kingdom). Participants not shown own country.

With a score of 54%, the UK Government is rated well ahead of fellow P5 powers, the USA (46%), France (44%), Russia (28%) and China (25%). The scores for distrust (a rating of between 0-4 out of 10) are especially noteworthy: UK 19%, USA 32%, France 25%, Russia 52% and China 53%. Across the sample group, China has the most distrusted government of any G20 member state. The difference in levels of trust is even more stark when we look at the NET scores:¹³ the UK Government has NET score for trust of +35%; the US Government +14%; the French +19%; the Russian -24%; and the Chinese -28%. His Majesty's Government is scoring respectively 59 and 63 percentage points higher than the governments of Presidents Putin and Xi on trust.

The metrics the British Council has tracked over time have tended to shift slowly but states can and do experience moments where the national brand takes a pummeling. The Trump Administration precipitated a dramatic, global fall in levels of trust in the US Government, resulting in it receiving the highest rating for distrust of any G20 member state in 2018. Global Perceptions 2023 is just as revealing as the 2018 study, only this time it is the impact of Russian war crimes in Ukraine on attitudes that is clearly etched into the ratings for trust and attractiveness.

Figure 4: Trust in government

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, 17,001 asked about the United Kingdom]. Participants not shown own country.

¹³ The NET rating for trust is the sum of the rating for trust minus that for distrust.

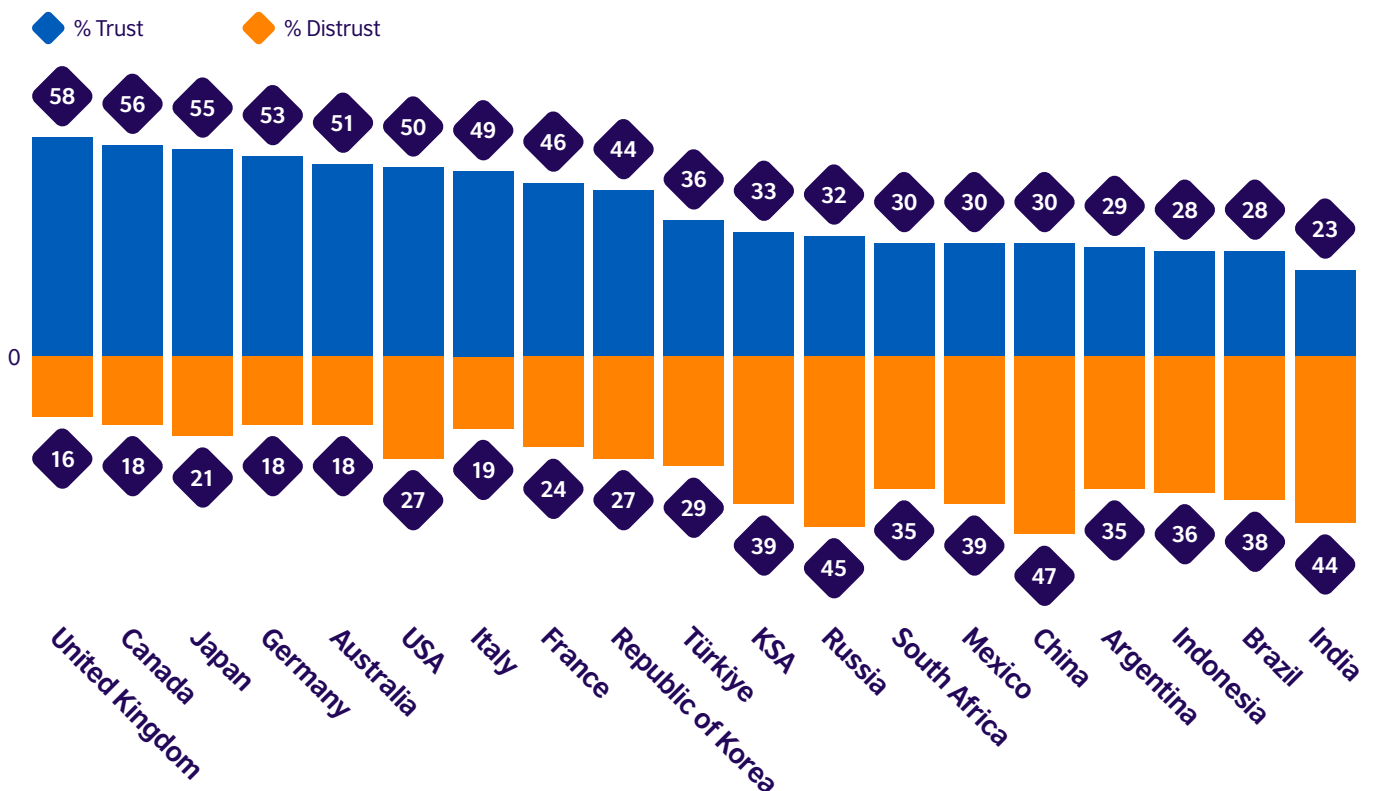
Another important feature of the trust data is how the Republic of Korea is much more clearly associated with the wealthy Western democracies – for trust in people, for example, Korea is ninth with a rating of 48%, just three percentage points behind France (51%), whereas the gap between Korea and tenth placed Türkiye is nine percentage points (39%). The pattern repeats for trust in government (France 44%, the Republic of Korea 41% and Türkiye 35%) and trust in institutions (France 46%, the Republic of Korea 44% and Türkiye 36%). The scale of the Republic of Korea's – and Türkiye's – burgeoning soft power, and the clear decline in confidence in France, is demonstrated by comparing the results for the three countries in spring 2016:

- France was sixth for trust in people with a rating of 58%, the Republic of Korea was 10th but on 39%, while Türkiye was 18th on 30%.
- France was fifth for trust in government with a rating of 50%, the Republic of Korea ninth on 34% and Türkiye 16th on 25%.
- For trust in institutions France was again fifth (54%), the Republic of Korea ninth (36%) and Türkiye 15th (26%).

Based on current trends it is likely that the Republic of Korea will increase its ratings for trust still further and overtake France. Additionally, it is not impossible that in the longer term, were current trends to continue, France could find itself outside of the top ten most trusted states as countries like Türkiye continue to grow their influence.

Figure 5: Trust in institutions

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, 17,001 asked about the United Kingdom). Participants not shown own country.



Influence in the world

Alongside attractiveness and trust we have recently introduced a new question to the Global Perceptions study to further explore states' soft power. Starting with the 2021 survey, we have asked participants:

And taking everything into account, how would you rate these countries on their overall influence in the world?

Participants rated each of the 19 G20 member states on a Likert scale from 0 to 10 with a score of between 0-4 indicating the country was perceived as a negative influence and 6-10 a positive one (see figure 6 on page 23). In June 2023 the UK had a rating of 67%, putting it first for this metric, ahead of Japan (66%) and the USA (65%). The ratings for the other P5 powers were France 60%, China 47% and Russia 40%. But again, the negative and NET scores¹⁴ put the differences in perceptions into sharper focus. The ratings for negative influence in the world were: UK 11%, Japan 15%, USA 18%, France 15%, China 33% and Russia 42%. This gives NET values for influence in the world as follows: UK +56%, Japan +51%, USA +47%, France +45%, China +14% and Russia -2%. Russia is the only country in the G20 to have a NET negative score on this metric.

Against a background of growing competition for influence and geopolitical challenge, it matters that the UK's ratings – for attractiveness, trust and influence in the world – are so resilient (see figure 7 on page 23). But that competition is growing fiercer with allies and rivals looking to best position themselves to secure their long-term security and prosperity.

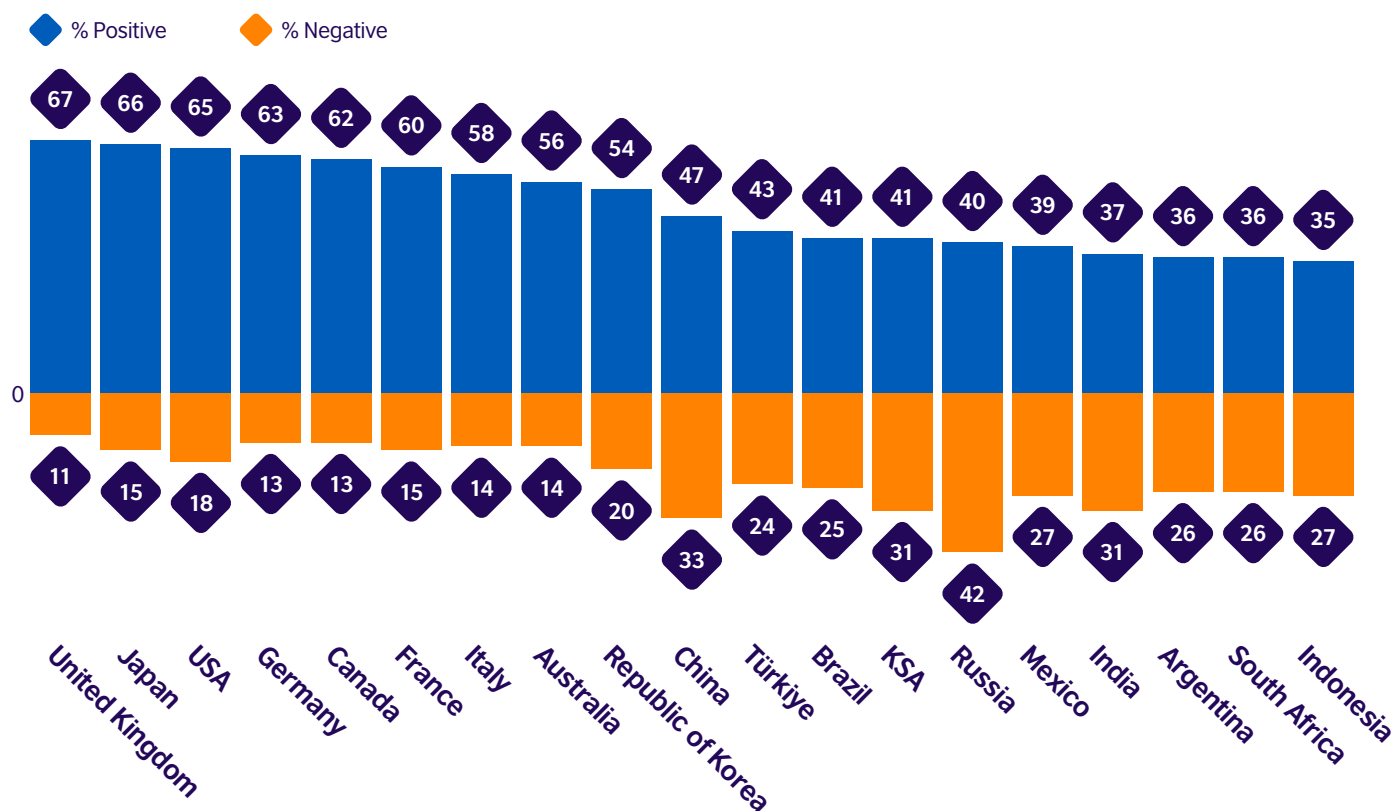
The UK was the most attractive country in the G20 in 2020 and 2021 but, despite increasing its rating in 2023, it is no longer in pole position. And even though it is possible that the UK will overtake Canada to become the G20's most trusted state, it is also possible that Japan's ascent could in turn see it overtake the UK. The longer-term outlook is for even greater competition. The UK cannot afford to be complacent, as its international influence, security and prosperity depends on continued investment in the institutions that underpin its privileged position. That means continued investment in its diplomatic corps; internationally facing departments and institutions; and those socio-cultural 'assets' that contribute so much to the UK's global appeal – the great universities, the arts and sciences, the historic environment, the creative industries and all the other myriad organisations, events and indeed individuals that, knowingly or not, shape perceptions of the UK. Soft power is founded on human and social capital – networks, connections, mutuality. Above all, this means the UK remaining true to its values: freedom, openness, respect and diversity. And not just to espouse these virtues but to focus on the Power of Example.¹⁵

¹⁴ The NET rating for influence in the world is the sum of the rating for positive influence minus that for negative influence.

¹⁵ Phillip Blond, James Noyes & Duncan Sim, "Britain's Global Future: Harnessing the soft power capital of UK institutions," Respublica (2017), <https://www.respublica.org.uk/wp-content/uploads/2017/07/ResPublica-Report-Britains-Global-Future.pdf>

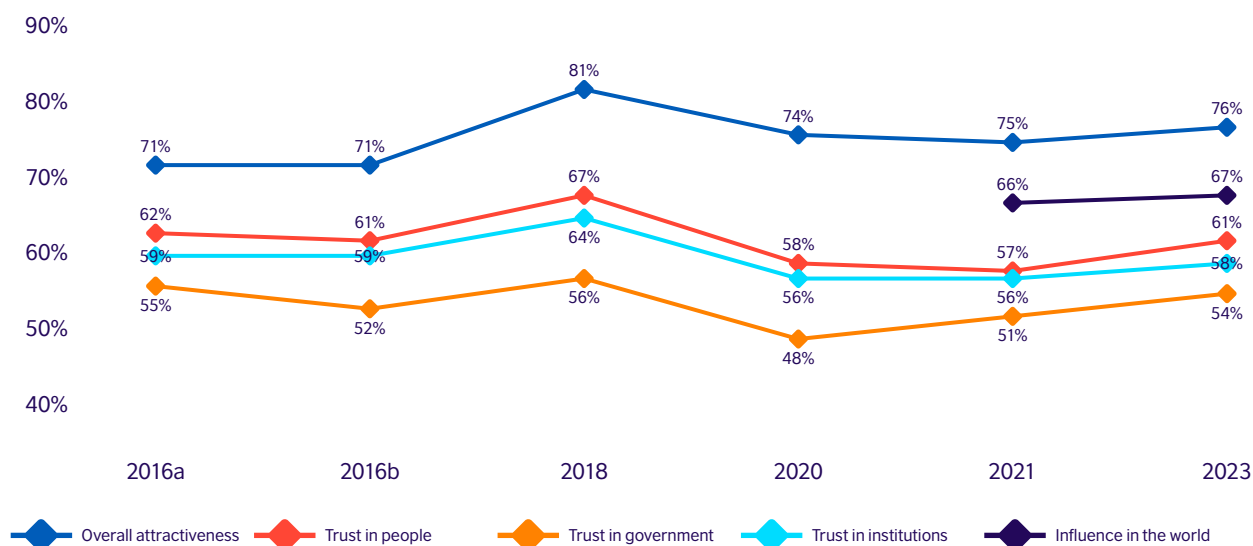
Figure 6: Influence in the world

How would you rate these countries on their overall influence in the world?



Base: c. 5,341 per country, 19,601 asked about the United Kingdom, 4,580 asked about Russia

Figure 7: The UK's ratings for attractiveness, influence in the world and trust in people, government and institutions are resilient over time.



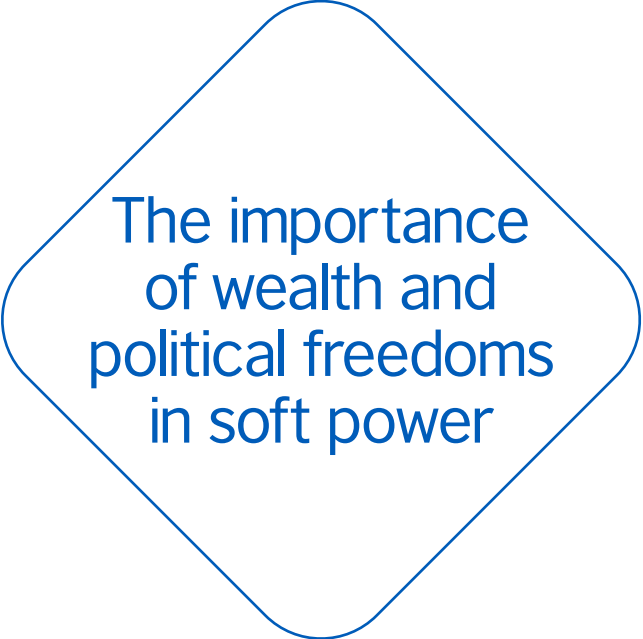
Base: 17,001 for overall attractiveness and trust. 19,601 for influence in the world. Participants were not asked about their own country.

Section 2

The Power of Example







The importance of wealth and political freedoms in soft power

It is possible to trace the common factors that underpin the success of the leading powers in the ratings, and the forces that can undermine and frustrate a state's soft power aspirations. What has emerged over the course of successive iterations of the Global Perceptions study is that two factors are particularly associated with a state's soft power: levels of individual wealth within a society, and that society's political and civil freedoms.¹⁶ Charting a state's GDP per capita (as measured by the World Bank)¹⁷ against whether the American NGO Freedom House rates a country as 'free', 'partly free' or 'not free' in its annual Freedom in the World¹⁸ report presents a pattern of distribution very similar to that presented by successive Global Perceptions surveys (see figure 8 on page 27). The most attractive and trusted states are the rich, 'free', liberal capitalist democracies. This cluster stands out very clearly. Countries with lower GDP per capita and the 'partly free' and 'not free' states perform less well in the rankings. This is further evidenced with the results from those middle income states where GDP per capita has improved between 2016-2023. Where this has happened, as when Indonesia was reclassified from a lower middle income to upper middle income state in 2020, the ratings for attractiveness and trust have tended to rise as well. A lack of improvement in the levels of political freedoms across the G20 during the period makes it difficult to test whether the same pattern exists when it comes to values. However, it does appear that the salience of political freedoms in the ratings in this year's study is greater than in the past, as we shall discuss below.

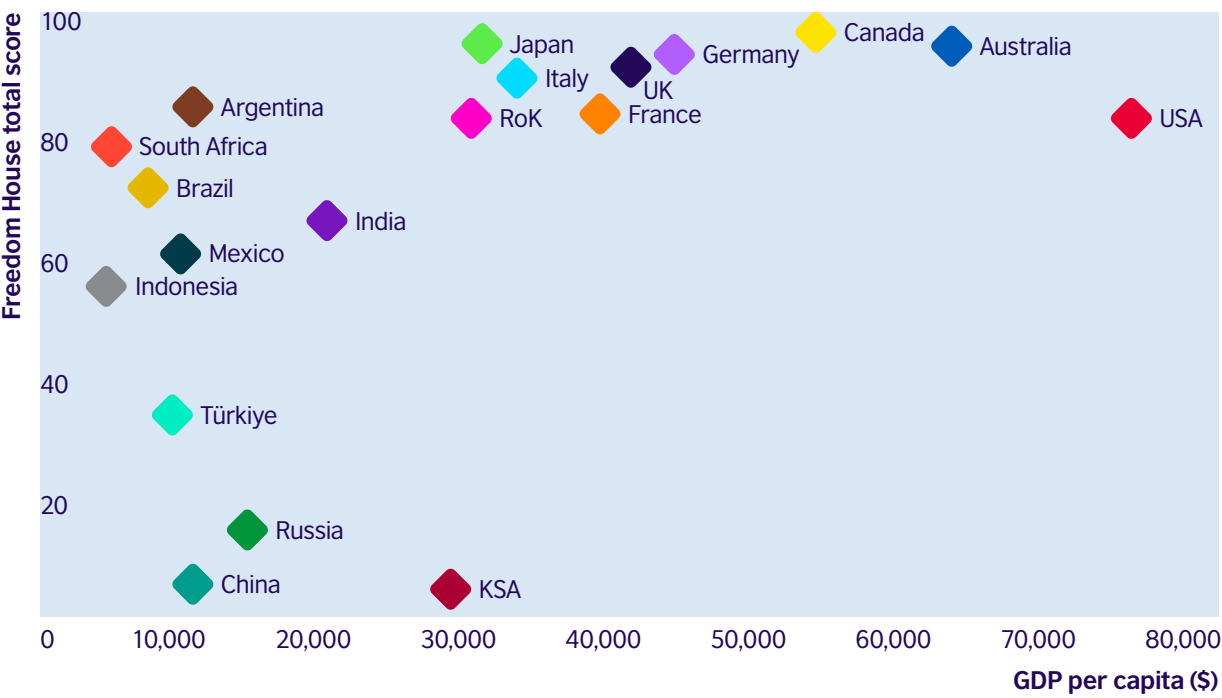
Perceptions of a state's hard power clearly matter, with the middle income democracies receiving lower ratings than the high income democracies. However, over the course of the survey the upper middle income democracies, and the hybrid states, that Freedom House has rated 'free' and 'partly free', have increased their ratings, while the 'not free' states have seen their ratings remain broadly static. If this trend continues, there may come a time when, instead of a jump between the Western states and the rest of the G20, we find a much closer competition developing between the democracies, with countries like Türkiye and Brazil following the Republic of Korea in catching up with France and other Western states and, potentially, displacing them in the rankings. It is possible we may even see a new gap emerging that separates the democracies from more authoritarian states. This hypothesis must, however, be caveated by the fact that other factors have and are continuing to impact on the ratings of countries. For example, had Russia not invaded Ukraine the pattern noted above might not be so apparent.

¹⁶ Alistair MacDonald, "Powers of Attraction: young people's views on the soft power of the G20 group of nations," British Council (2018), https://www.britishcouncil.org/sites/default/files/j136_thought_leadership_g20_perceptions_196x284mm_final_web_v3.pdf

¹⁷ "World Bank Country and Lending Groups," World Bank (2023), <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups#:~:text=For%20the%20current%202024%20fiscal%20year%2C%20low-income%20economies,a%20GNI%20per%20capita%20of%20%2413%2C846%20or%20more.>

¹⁸ "Freedom in the World 2023," Freedom House (2023), https://freedomhouse.org/sites/default/files/2023-03/FIW_World_2023_DigitalPDF.pdf

**Figure 8: Political freedoms
x GDP per capita across the G20**



Sources: World Bank GDP per capita (\$) and Freedom House, Freedom in the World 2023



The most important values in the 21st century

The importance of values to states' soft power is explored in the questionnaire used for the Global Perceptions study. Participants are asked to identify the values they consider the most important in the world today (see figure 9 on page 29). The top two values remain unchanged from 2021, with 'equality' taking the top spot on 36% and 'sustainability' on 30%. However, 'sustainability' is now joined in second place by 'freedom'. It is worth noting that in choosing these values, participants are presented with the meaning of what exactly the terms 'equality', 'freedom' and 'sustainability' in this context refer to:

- Equality (providing equal rights for people regardless of their age, gender, race, ethnicity, disability or sexual orientation).
- Freedom (e.g., freedom of thought, conscience, religion, opinion, expression).
- Sustainability (e.g., care for the environment, protecting nature).

Looking at the top three choices from individual states there is a high degree of agreement over what are the most important values. 'Equality' is in the top three in every country and comes first in 12 of them. There is also a very clear convergence across the anglophone countries and European states with 'equality' first in all nine countries. The geographic and cultural proximity of Europeans, the Commonwealth, and the peoples of the Americas is strongly pronounced. They broadly agree on the top three as well, with just a few dissenters:

- In Australia 'peace' pushes 'freedom' out of the top three.
- In South Africa 'peace' displaces 'sustainability'.
- In both India and the United States 'honesty' pushes 'sustainability' out of the top three.

'Peace' (referred to as, 'working for a peaceful world, ending armed conflict') is in fourth position in the average rankings, the same as it was in 2021. At 27% this rating is effectively unchanged from 2021 (26%), despite rising global tensions. However, 'peace' does rank in the top four for half of all the countries surveyed and is ranked first in Japan and Indonesia. Three values are in joint fifth in the rankings with a rating of 21% in the average results: 'honesty/transparency', 'respect for others' and 'respect for different cultures and valuing diversity'. Another finding worth noting is that 'religion and spirituality/religious values' ranks first in the Kingdom of Saudi Arabia (KSA), with a rating of 28%, the only country with this value in its top three. Indeed, in most G20 states, religion fails to make the top ten, usually scoring less than 10%.

Figure 9: The most important values
 What are the most important values in the 21st century?



Base: All participants in the G20 [2021 20,616, 2023 19,601]



Walking the walk

In addition to asking participants to identify the values they considered the most important, we also asked them to indicate which G20 countries they feel do the most to support these values (see figure 10 on page 31). Canada (61%), Australia (57%), Germany (54%) and the UK (53%) are the highest ranked states on this metric. The rest of the top nine are again the other Western states. There has been only limited change over time – in 2021 the top four were again Canada (61%), Germany (56%), Australia (55%) and the UK (54%). These results confirm the strong association between values like ‘freedom’ and ‘equality’ and perceptions of attractiveness and trustworthiness.

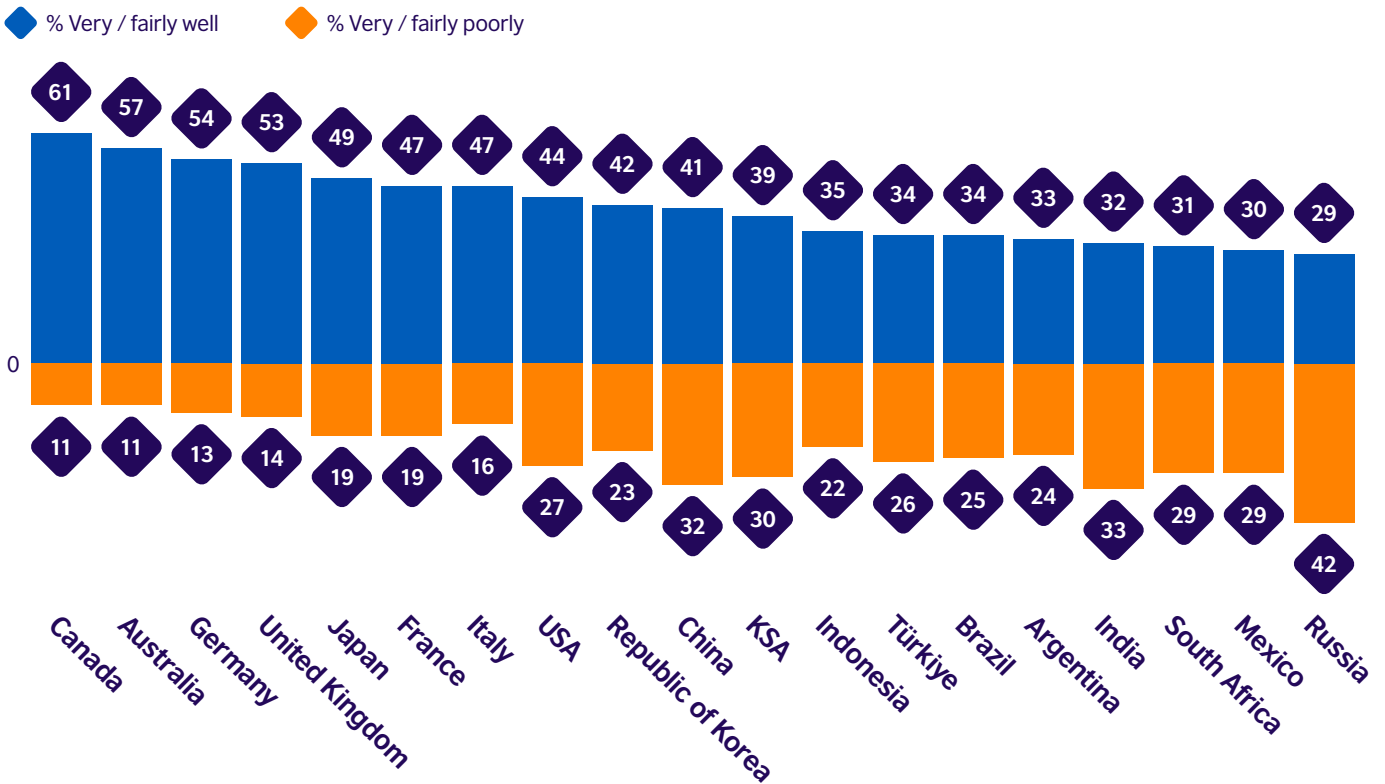
Perhaps more interesting than which states are the highest rated, is the distribution of the rest. Unlike in the ratings for trust, attractiveness and influence in the world, China comes in 10th place on 41%, just behind the Republic of Korea (42%), with KSA in 11th on 39%. Both China and KSA have slightly increased their ratings compared to 2021 (40% and 36%). It is notable that there is not the same significant step down between the ratings for the Western states and the rest of the G20 that we have seen for the other metrics covered above. Also significant is that Russia, which had been 12th on 34% in 2021, has fallen to last place in the rankings in 2023, though the rating is only slightly down at 29%. Again, we can see how the closeness of the ratings means a relatively small change can have a significant impact on rankings. A second feature of the ratings for Russia is also important. While the rating for very/fairly well only fell by 5%, the rating for very/fairly poorly (i.e., a rating of between 0-4) rose 11 points from 31% to 42%.

Given the importance participants across the G20 place in ‘working for a peaceful world, ending armed conflict’, it is not at all surprising that Russia’s position has seen a sharp decline. What we see both here and elsewhere is the negative impact of being seen as not living the values that a majority of young people in the G20 think are the most important in the world.

These findings suggest it is critical to act, and be seen to act, in accordance with what are fundamental human rights. For a state to be trusted, it must treat both its own people and the peoples of the world with respect, decency and understanding. It must embody the values that people view as important. The wealthy, liberal democracies are perceived as open, stable and fair. They are states in which people’s views carry weight, with low levels of corruption and where governments are held to account. Honesty is fundamental to credibility and trustworthiness. As we face uncertain, increasingly dangerous times, being seen as an honest, trustworthy country will be increasingly valuable.

Figure 10: Values leadership

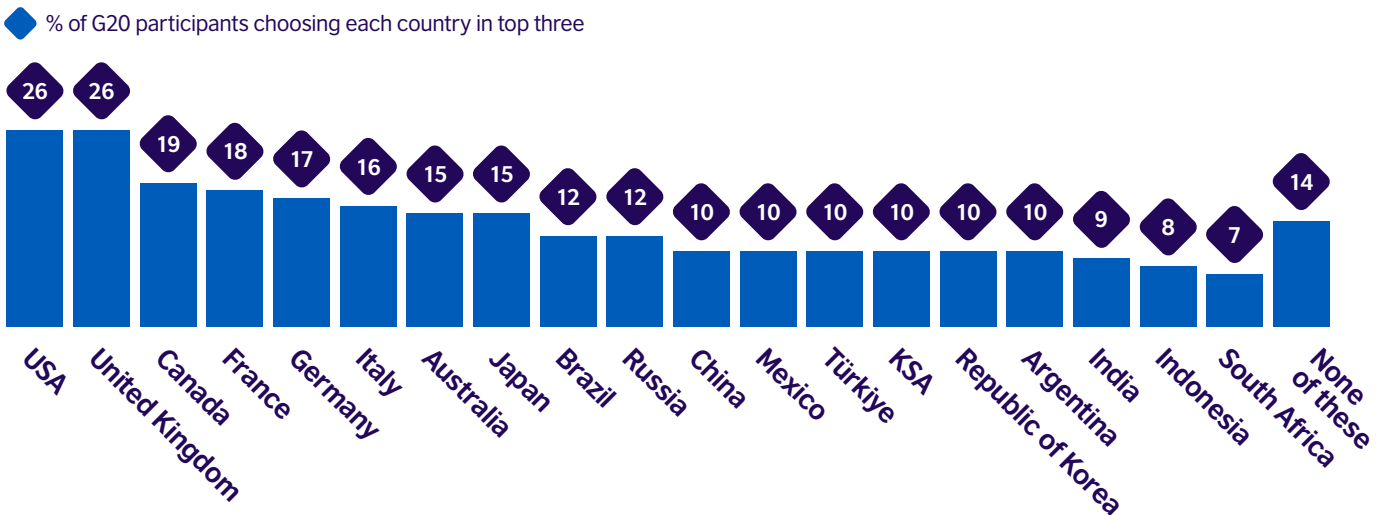
How well does each country support and encourage the values you think are important in the 21st century?



Base: c. 5,341 per country, 19,601 asked about the United Kingdom, 4,580 asked about Russia

Figure 11: Values proximity

Which THREE of these countries do you consider have values which are closest to those of your country?



Base: G20 participants [19,601]. Participants were not asked about their own country.

The UK should not underestimate the role that exemplifying and living openly by its values plays in its soft power and influence. HM Government recognises this, describing the UK's soft power as...

... rooted in who we are as a country: our values and way of life, and the vibrancy and diversity of our Union. It is central to our international identity as an open, trustworthy and innovative country. It helps build positive perceptions of the UK, create strong people-to-people links and familiarity with our values through cultural exchange and tourism. It also enhances our ability to attract international business, research collaboration and students – and, ultimately, to effect change in the world.¹⁹

British Council research has found that:

People feel more trust and motivation to work together when they have values (rather than just interests) in common. A better understanding of values, similarities and differences can help create the conditions for co-operation on shared global challenges.²⁰

Building on the findings from the 'Big Conversation',²¹ we have introduced a new question to the Global Perceptions study to ascertain which countries participants feel have values closest to those of their own country (see figure 11 on page 31). The UK and USA are the countries that people across the G20 countries feel are closest to their own values (both were rated 26%). Other Western states are the most commonly cited, with Canada on 19%, followed by France (18%), Germany (17%), Italy (16%), and Australia and Japan (both 15%).

The individual country findings from this question (see table 1 on page 33) provide a further useful illustration of the role of geographical and cultural proximity in a state's soft power. For example, the following are where the first rank positions are reciprocated:

- Japan and the Republic of Korea
- Türkiye and KSA
- UK and USA
- Germany and France
- Brazil and Argentina

If we focus on how other countries view the UK, we find that participants from Australia, Canada, and the USA are most likely to think that the UK is closest to their country in terms of values. Participants in Germany and France rate each other first and the UK second. India also ranks the UK joint second with Japan after the USA. Italy, Japan and South Africa all rank the UK third, while KSA and the Republic of Korea rank it fourth. The UK performs less well with participants in Brazil (eighth), Indonesia (ninth), China (10th), Argentina and Mexico (12th), and Türkiye (13th).

That sense of connection and familiarity gives the UK a powerful platform to engage with the peoples of the world. By exemplifying and harnessing shared values and positive perceptions, the UK is well placed to influence, collaborate and act on key global issues, in turn solidifying international trust in the UK, long-term connections and enhancing its influence.

¹⁹ Global Britain in a Competitive Age: the Integrated Review of Security, Defence, Development and Foreign Policy, 2021 <https://www.gov.uk/government/publications/global-britain-in-a-competitive-age-the-integrated-review-of-security-defence-development-and-foreign-policy>

²⁰ The Big Conversation 2020, <https://www.britishcouncil.org/research-policy-insight/insight-articles/big-conversation-international-plenary>

²¹ Michael Bruter, Sarah Harrison, Sandra Obradović and Elisabet Vives, "The Big Conversation Research Pilot Final Report," British Council and London School of Economics and Political Science (2021), https://www.britishcouncil.org/sites/default/files/the_big_conversation_research_pilot_report_april_2021.pdf

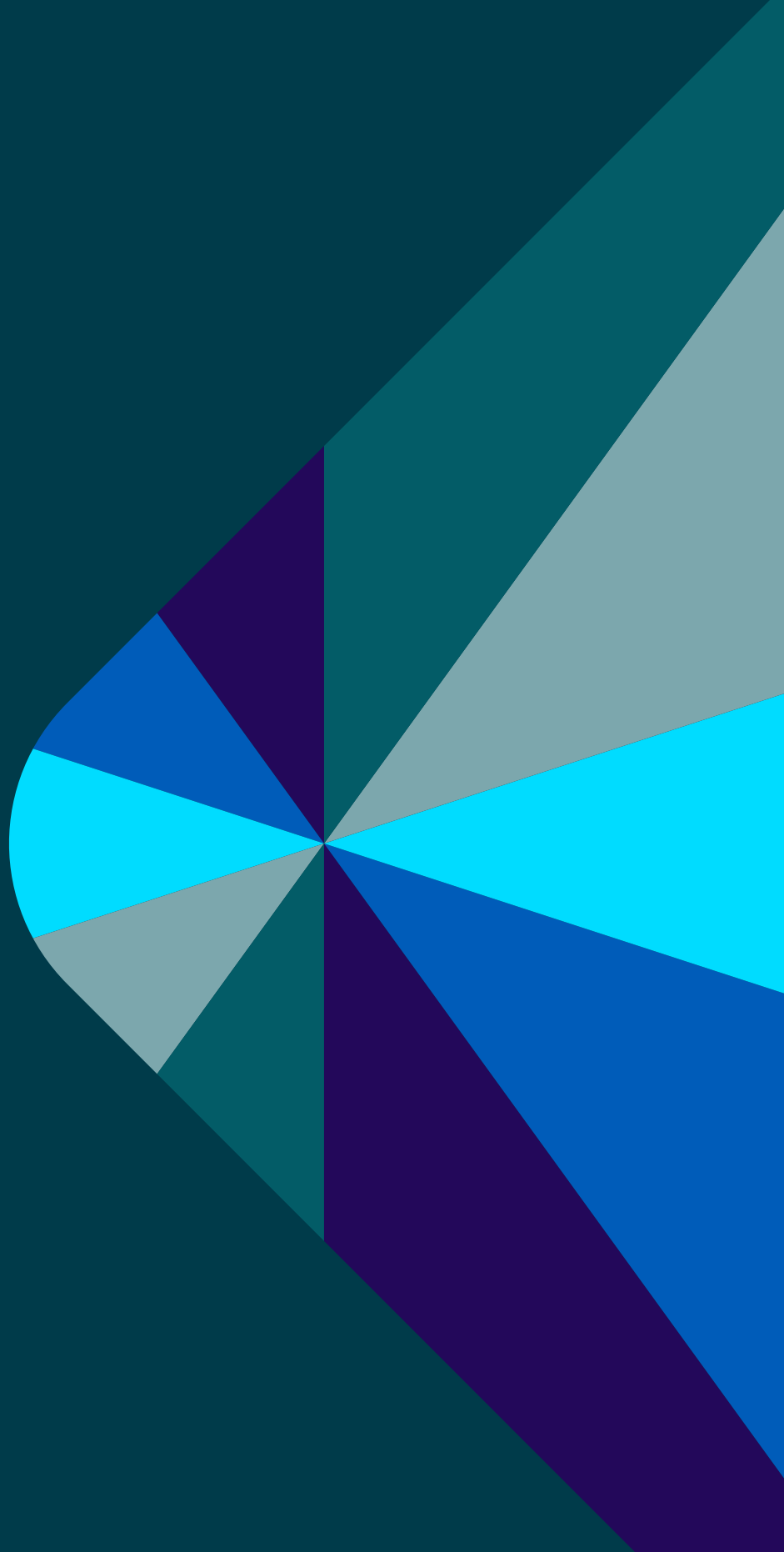
Table 1: Values proximity by country

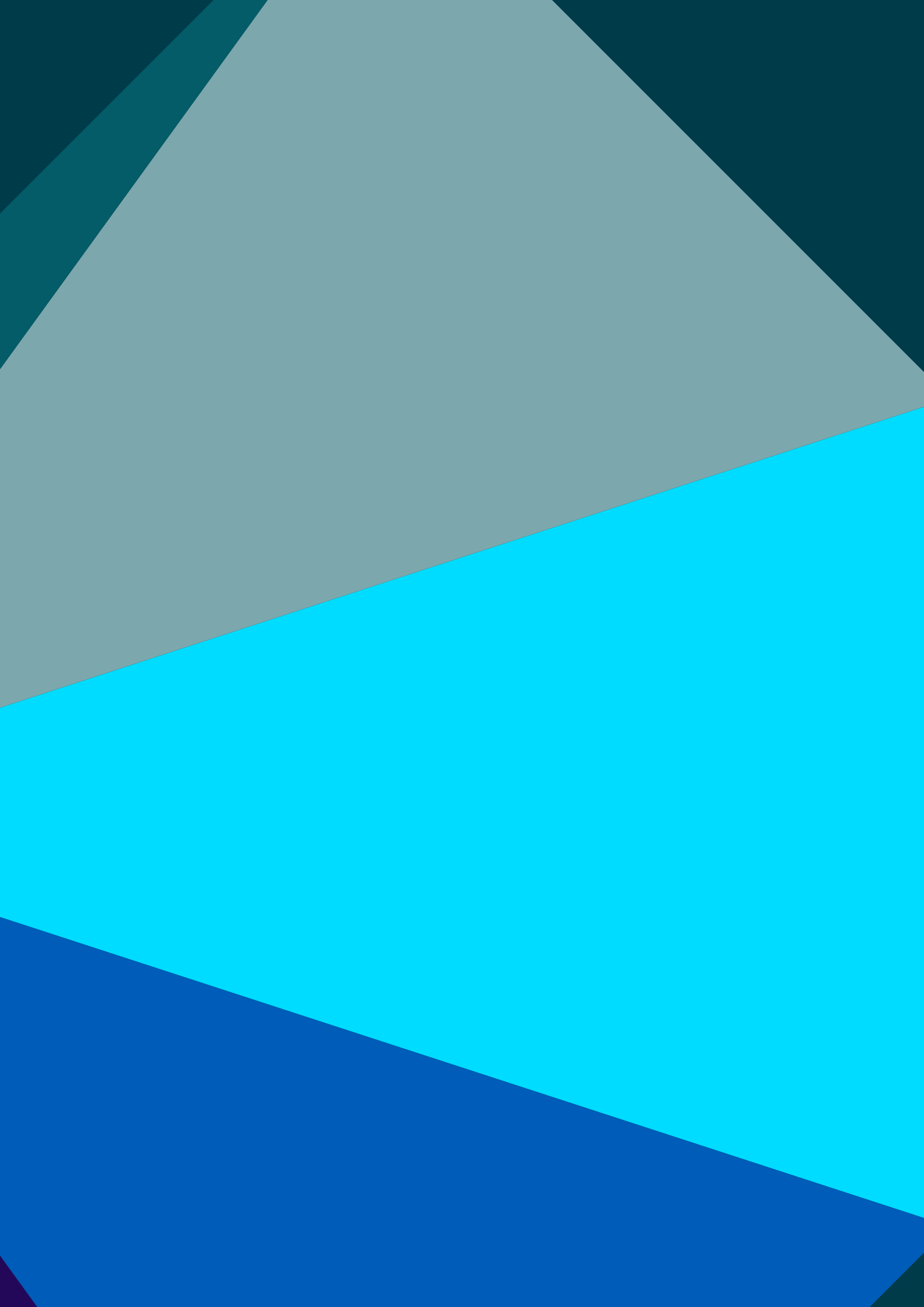
Which THREE of these countries do you consider have values which are closest to those of your country?

Respondents from country	Country seen as having values closest to own country	Country seen as having values second closest to own country		Country seen as having values third closest to own country
Argentina	Brazil (58%)	Mexico (52%)		Italy (36%)
Australia	UK (63%)	Canada (51%)		USA (38%)
Brazil	Argentina (42%)	USA (37%)		Mexico (31%)
Canada	UK (55%)	USA (54%)		Australia (38%)
China	Russia (50%)	France (19%)	KSA (19%)	
France	Germany (51%)	UK (44%)		Italy (43%)
Germany	France (48%)	UK (38%)		Italy (36%)
India	USA (41%)	Japan (29%)	UK (29%)	
Indonesia	KSA (51%)	Japan (42%)		Türkiye (33%)
Italy	France (52%)	Germany (44%)		UK (39%)
Japan	Republic of Korea (25%)	USA (22%)		UK (18%)
Mexico	Argentina (45%)	Brazil (43%)		USA (34%)
KSA	Türkiye (43%)	Indonesia (32%)		Japan (20%)
South Africa	USA (35%)	China (32%)		UK (30%)
Republic of Korea	Japan (46%)	USA (37%)		China (18%)
Türkiye	KSA (31%)	Germany (27%)		Indonesia (22%)
UK	USA (47%)	Canada (39%)		Australia (38%)
USA	UK (53%)	Canada (48%)		Australia (22%)

Section 3

The UK and the world







Perceptions of the UK in 2023

While the global mean ratings for attractiveness, trust and influence set out above are interesting and important they can also be deceptive. By taking the mean results from across the G20 the outliers from that average are not properly accounted for. Usually, the average represents where majority opinion settles but it can also be a midpoint between more extreme positions with the average only really representing the views of a smaller number of states. Greater insight comes from looking at the results from individual countries. Again, these are an average of the diverse opinions of a thousand citizens from each country, but they do at least give a representative impression of that country's population's outlook on the world.

Looking at the results in detail we find that despite averaging second for overall attractiveness in the global results, the UK's individual rankings and ratings are quite varied (see table 2 on page 38), the UK is actually:

- first in India (86%) and Italy (77%)
- second in China (79%), Japan (63%), Republic of Korea (70%) and South Africa (86%)
- third in Canada (76%) and Indonesia (82%)
- fourth in Australia (78%), France (67%) and KSA (75%)
- fifth in Brazil (80%), Germany (66%), Türkiye (72%) and the USA (70%)
- sixth in Mexico (84%)
- seventh in Argentina (77%).

It's a stronger picture for trust (see table 3 page 39): for example, the results for trust in government reveal the UK is:

- first in Australia (60%), Canada (54%), Germany (46%), India (76%) and South Africa (62%)
- second in Brazil (59%), France (49%), Italy (58%), Japan (41%) and USA (50%)
- third in China (54%), Indonesia (63%) and Republic of Korea (50%)
- fourth in KSA (58%)
- fifth in Mexico (53%)
- sixth in Argentina (36%) and Türkiye (53%).

And for influence in the world (see table 4 on page 40):

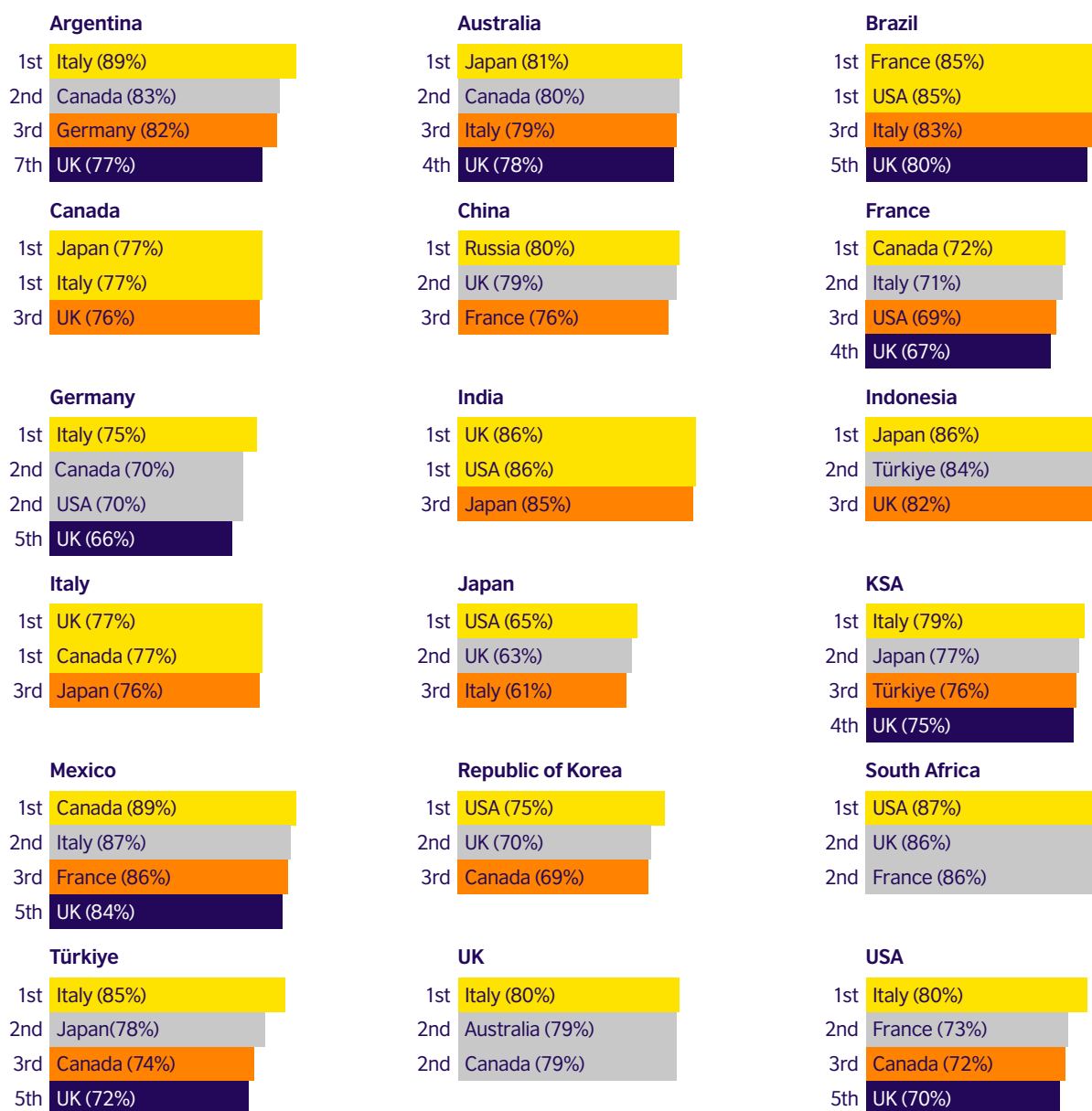
- first in Australia (75%), Canada (69%), France (58%), Italy (68%), South Africa (84%) and the USA (62%)
- second in India (83%), Japan (53%), KSA (68%) and the Republic of Korea (55%)
- third in Brazil (73%) and Indonesia (77%)
- fourth in China (69%) and Mexico (75%)
- fifth in Argentina (58%), Germany (54%) and Türkiye (65%).

The individual results reveal the fascinating differences between the populations polled – young adult participants in India and South Africa are wonderfully generous in their ratings. Other populations, even where they still rank the UK first or second, significantly less so. History, culture and geography affect the UK's position which is clearly buoyed by longstanding Commonwealth connections. Another important observation is that the UK's rankings are remarkably consistent. Across multiple countries and metrics, the UK is typically ranked in the top three. It is this consistency that sees the UK perform so well in the average results. Other states have varied ratings, securing the highest ratings in some countries but then performing significantly less well in others. The USA, for example, is top for overall attractiveness in six countries but has only one second and one third place ranking.

What this means is that the UK's soft power appears to have universal appeal. That does not, however, mean it is uncontested. The ratings from the individual countries reveal just how tight the competition for influence truly is. For example, the UK is joint first for attractiveness in India but the ratings for the top five were: UK and USA 86%, Japan 85%, and then France and Germany both on 83%. Any of these countries could overtake the UK. We stand at the dawn of a new multipolar era, with India destined to be one of the most important of these poles. As a result, there is a fierce competition between states to engage with the government and people of India. The stakes could not be higher. It is in the vital interest of the UK and its allies that India continues to bring its considerable weight and influence to bear in support of the RBIS. This is fundamental to the RBIS's global legitimacy and continued relevance in the long term.

Table 2: Attractiveness by country

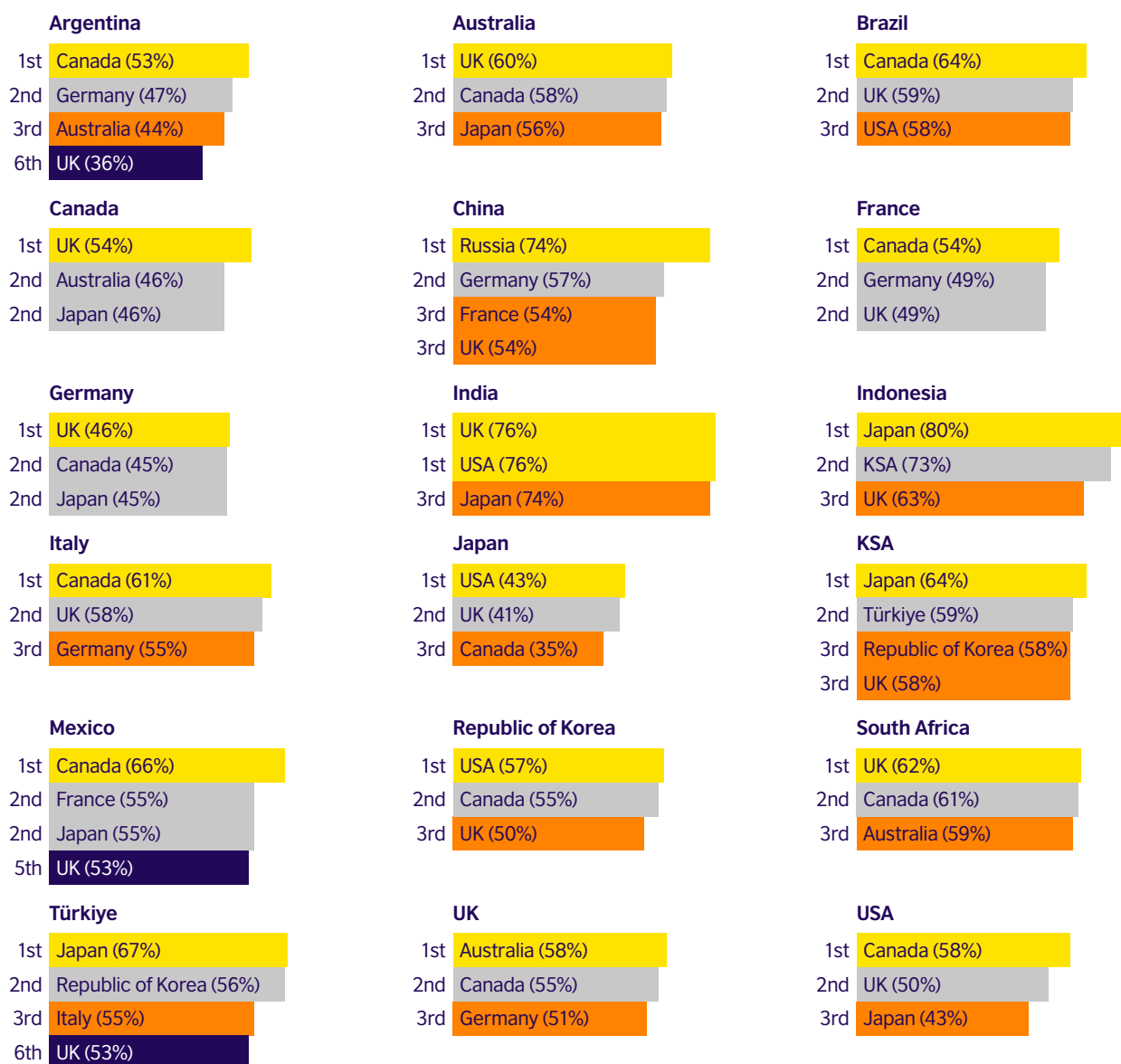
How attractive overall do you find each of the following countries?



Base: All G20 participants [1,000 per country]

Table 3: Trust in government by country

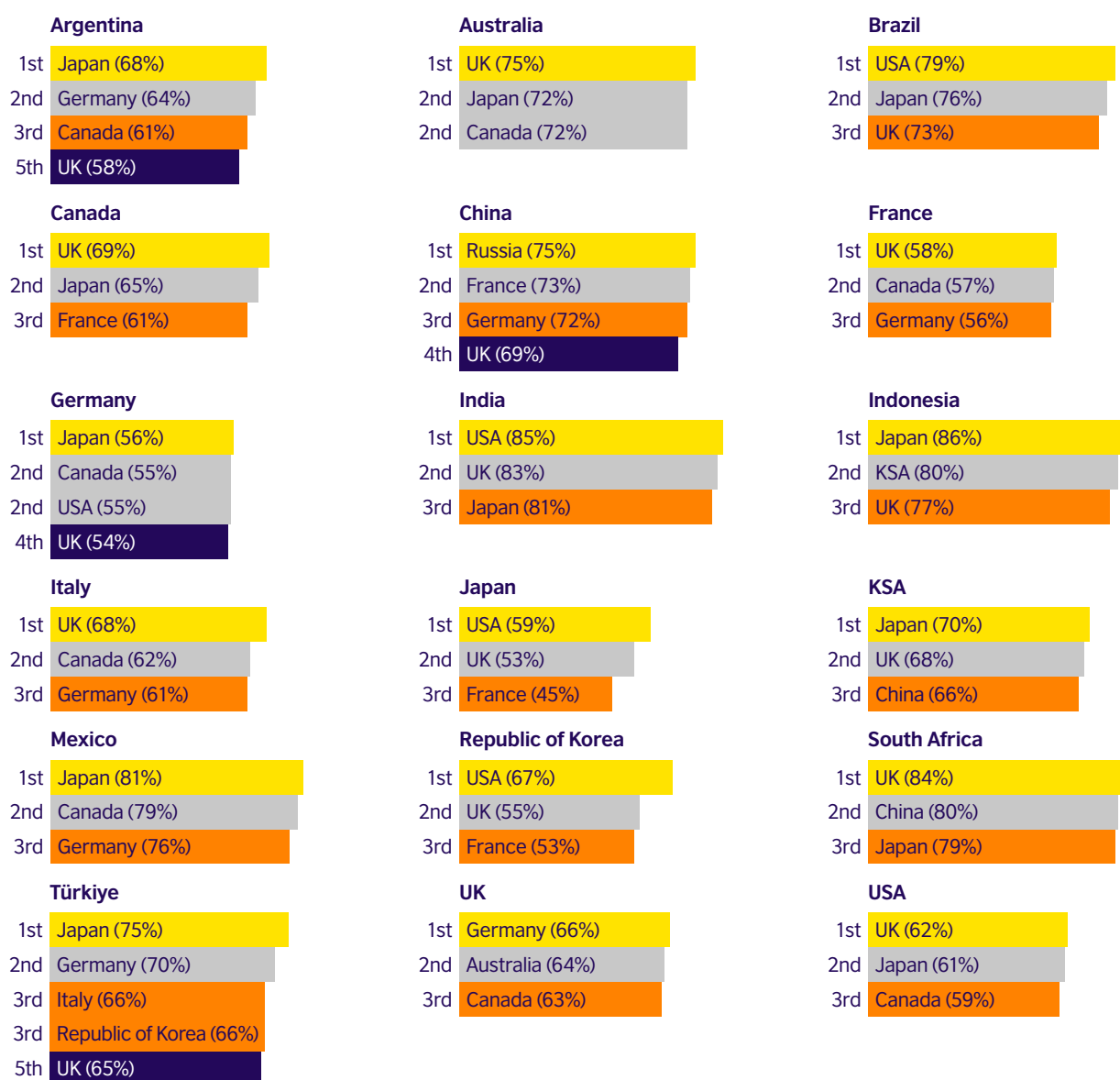
Thinking generally about government, to what extent do you distrust or trust the government from each of the following countries?



Base: All G20 participants [1,000 per country]

Table 4: Influence in the world by country

How would you rate these countries on their overall influence in the world?



Base: All G20 participants [1,000 per country]



Long-term trends

It is worth juxtaposing the findings from spring 2016 with those of 2023 (see figures 12 and 13 on page 43), though we do not have data for the positive influence in the world metric for that year. In 2016 the UK's ranks and ratings for overall attractiveness were:

- first in India and South Africa (82% in both)
- second in Canada (77%) and the Republic of Korea (73%)
- third in Australia (74%), China (85%), Germany (67%), Indonesia (83%), Japan (54%) and Italy (82%)
- fourth in France (66%)
- fifth in Argentina (75%) and USA (76%)
- sixth in Mexico (80%)
- seventh in Türkiye (53%) and KSA (45%)
- eighth in Brazil (68%).

While those for trust in government were:

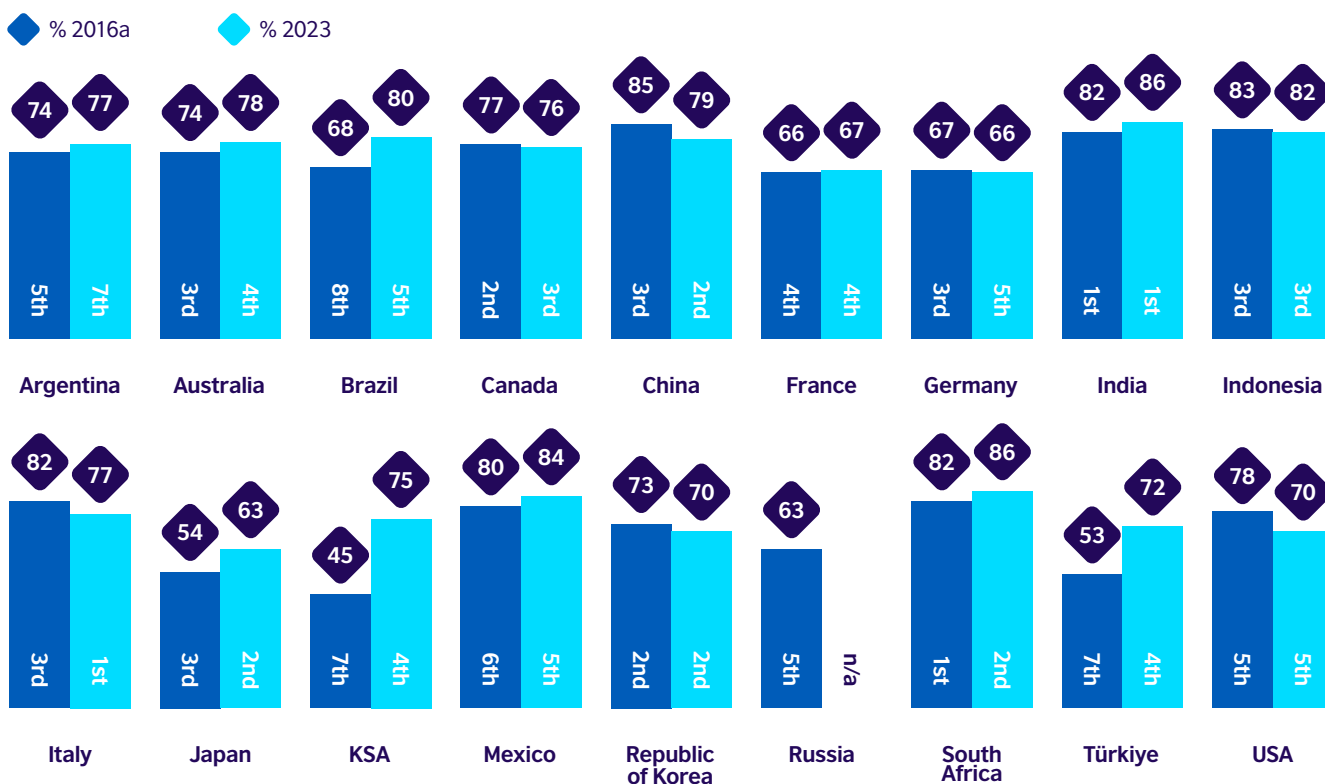
- first [nowhere]
- second Australia (61%), Canada (60%), India (74%), Indonesia (74%) and South Africa (66%)
- third in France (52%), Germany (49%), Italy (69%), Mexico (61%), KSA (36%) and the USA (66%)
- fourth in China (74%), Japan (34%) and the Republic of Korea (57%)
- fifth in Brazil (51%)
- sixth in Türkiye (42%)
- seventh in Argentina (39%).

Across the G20 attitudes towards the UK appear to be broadly stable with the difference between the ratings from 2016 and 2023 being fairly marginal in the majority of countries. There are, however, notable exceptions, such as the Kingdom of Saudi Arabia and Türkiye, where the UK's ratings are significantly improved, but also China, where the UK's ratings for trust are sharply down. The latter shift is not, however, unique to the UK. Across the board, the 'trust' data from China reveals a steep and concerning decline in levels of trust in other G20 countries. Australia was first for trust in government in 2016 with a rating of 77% amongst our Chinese respondents, but now scores 45%, Germany has gone from 75% to 57%, Canada 75% to 43%. And it is not just Western states that have seen reductions; trust in China's fellow BRICs²² has also declined. Brazil has gone from 56% to 44%, South Africa 55% to 41% and India 36% to 23%. Russia is the sole outlier with its 2016 rating of 74% being the exact same as its 2023 rating. The news from China is not all bad for the UK. While its rating for trust in government has fallen, its rating for overall attractiveness is actually higher in 2023 than it was in 2016.

²² The BRICS is a grouping of Brazil, China, India, Russia and South Africa. In August 2023 Argentina, Egypt, Ethiopia, Iran, Saudi Arabia and the United Arab Emirates were all invited to join the group.

Figure 12: How young people from other G20 countries rated and ranked the UK for overall attractiveness in 2016 and 2023

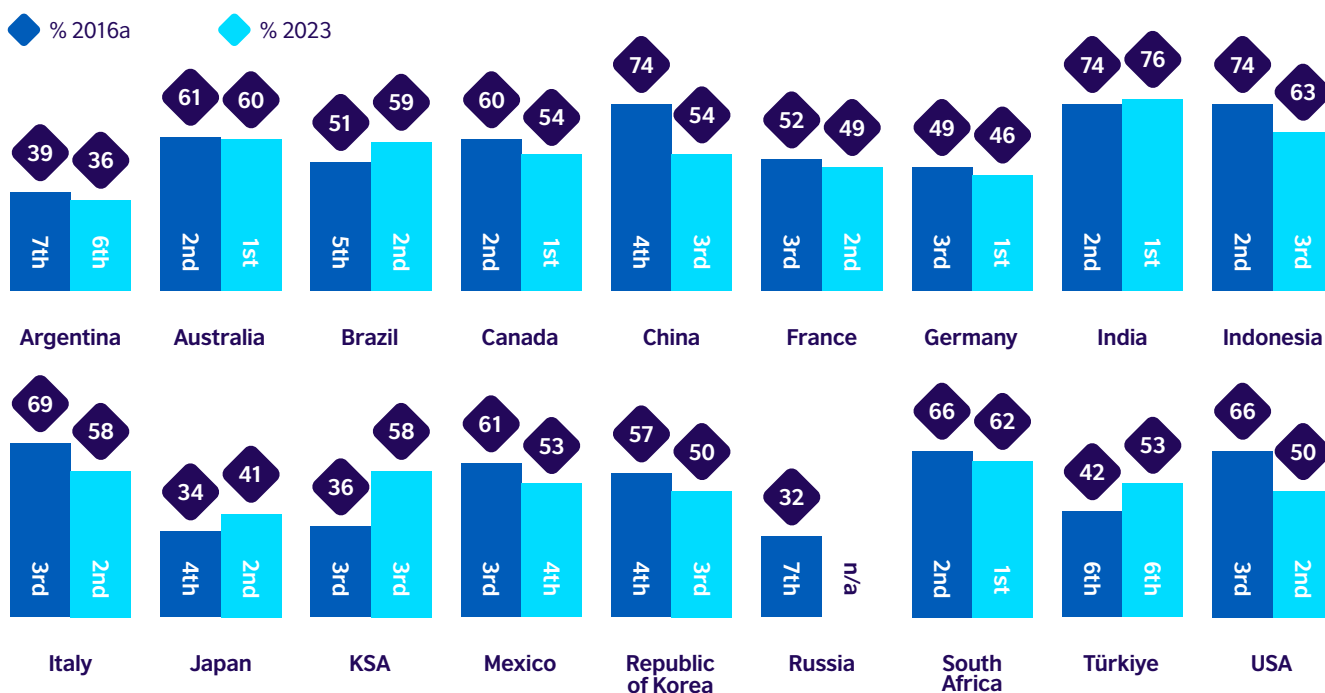
How attractive overall do you find each of the following countries?



Base: 1,000 per country

Figure 13: How young people from other G20 countries rated and ranked the UK for trust in government in 2016 and 2023

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



Base: 1,000 per country



The UK and Europe

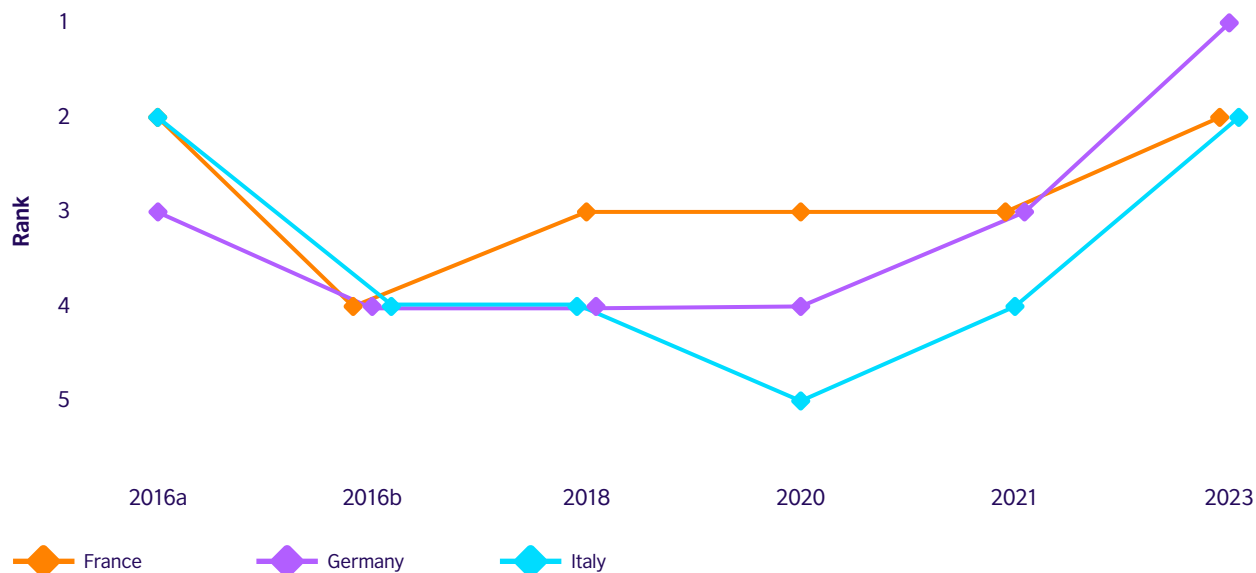
Another point worth noting is that we may at last be seeing Europeans move on from Brexit. The UK's decision to leave the European Union (EU) had a negative impact on the ratings from the three remaining EU G20 states in the months and years that followed. This is exemplified by the ratings for trust in the UK government (see figure 14 on page 45):

- In France the rating in spring 2016, i.e., before the referendum, was 52%. In that summer's post referendum survey, it was 45%. In 2018 the score was 57%, in 2020 47% and in 2021 45%. Now the UK's rating is 49%, still a few percentage points down on the spring of 2016, but the UK is up one rank to second.
- The respective data points for Germany were: 49%, 39%, 43%, 33%, 39% and 46%. Note that while the rating has not quite returned to 2016 levels, the UK is again ranked higher than it was in 2016.
- For Italy: 69%, 61%, 67%, 41%, 52% and 58%. As with Germany, while the rating remains below that of spring 2016, the UK's ranking is again higher than it was then.

A number of factors may be at play. Firstly, it is worth remembering that many of the 18–34 year olds surveyed would have been young teenagers in 2016 and may have had limited exposure to Brexit. Post-Brexit Europe may well be all they have ever really known. Secondly, even among older participants, it is unlikely that Brexit will have had the same resonance as it did for those now in the late thirties and early forties who are no longer a part of the sample group. Third, and perhaps most importantly, confronted by the Russo-Ukrainian War and other geopolitical and economic threats, they have seen that the UK continues to play an essential part in Europe's security and prosperity.

Figure 14: Changes in the UK's rankings for trust in government in France, Germany and Italy 2016-2023

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





The UK's Indo-Pacific tilt

In light of the Indo-Pacific tilt described in HM Government's Integrated Review Refresh 2023,²³ it is worth comparing how the UK is perceived across the region relative to other powers. The Indo-Pacific tilt represents an important strategic shift that has already had significant geopolitical consequences, including the creation of AUKUS, the UK's ascension to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and numerous other signs of re-engagement with the region, whether bilaterally, as with the Republic of Korea and Japan, or multilaterally, with Commonwealth allies and ASEAN.

Where there has been volatility in perceptions of the UK amongst the leading European states, the UK's position in the Indo-Pacific is generally one of stability and strength:

- In Australia the UK's ratings for attractiveness have increased from 74% in spring 2016 to 78% in 2023. The ratings for trust in government are essentially static – 61% in 2016, 60% in 2023, though the UK's rank has increased from second to first.
- In India the UK's ratings for attractiveness have increased from 82% to 86%. The ratings for trust in government have also increased, rising from 74% to 76%.
- In Indonesia attractiveness levels have been static – 83% in 2016, 82% in 2023. The ratings for trust in government are down from 74% to 63%, though the UK remains third in the rankings.
- In Japan attractiveness levels have improved substantially, from 49% in 2016 to 63% in 2023, taking the UK from seventh to second in the rankings. The ratings for trust in government are also up, from 34% to 41% again placing the UK second.

- The respective ratings from the Republic of Korea are 73% and 70% and 57% and 50%. Again, though the UK's rating for trust in government is down, it has risen from fourth to third in the rankings.

We have already touched on the UK's ratings in China above, but it is worth considering these in more detail, and how these compare with those of the UK's close allies in the region that have come together to form the Quad.²⁴ If we focus on the ratings for trust in government, we find that:

- In the spring 2016 survey, the UK Government rated 74% for trust. In 2018 the UK score edged up to 76%, to fall back in 2020 to 65% and then again in 2021 to 47% only to actually tick back up to 54% in 2023.
- The respective scores for the United States are: 56%, 58%, 40%, 22% and 33%.
- For Japan: 36%, 42%, 46%, 21% and 25%.
- For India: 36%, 41%, 32%, 18% and 23%.
- And for Australia: 77%, 67%, 49%, 25% and 45%.

In 2016, the Australian government was the most trusted of any in the G20 by participants in China but by 2021 had fallen to 14th rank, though it has recovered in 2023 to seventh. While the UK Government has also seen a fall in trust from the levels recorded in 2016, it remains significantly more trusted than most other G20 states, with only Russia (74%) and Germany (57%) scoring higher in 2023.

The Asian Century²⁵ is already here but many of its leading players are suspicious of one another. Progress and co-operation will be possible but, without increases in trust, this will be more limited and the region may never realise its true potential. The data suggests the UK could play a unique convening role in the region, given it is trusted by all the leading G20 powers and has close, long-standing connections with other key regional players like Malaysia, New Zealand and Singapore through the Commonwealth, as well as ever-deepening ties with both ASEAN and individual ASEAN member states, notably so with Thailand, the Philippines and Vietnam. Crucially, the UK is seen as a positive influence, and its presence is seen as beneficial and a source of stability. It is viewed as a partner with which to co-operate rather than a rival. If public opinion is anything to go by then the UK's increased engagement with the Indo-Pacific appears to be viewed as a positive development. However, to sustain and indeed deepen its relationships across the region in the medium- and long-term, and to maximise the benefits in terms of influence and trade, will require the UK to maintain and expand engagement and investment.

Collectively, these are a significant set of results for the UK that grants real insight into the UK's global role and influence. The UK continues to be viewed as an exceptionally attractive, trusted country. It is generally seen as a constructive international actor, and is trusted to act for the common good rather than narrow self-interest. What is particularly interesting – and unique to the UK – is that this perception is broadly replicated across the data from individual countries. The high levels of trust in the UK government internationally grants it significant soft power leverage. The UK government is the P5 state that is seen as the most credible, reliable and focused on working towards the common good over narrow self-interest. In a world of growing competition for influence, that grants the UK a significant diplomatic edge. The UK is seen as an attractive, trusted partner by states looking to build alliances and agree trade deals. That status is incredibly valuable to the UK.

Regardless, the incredibly tight competition for influence revealed by the data underlines just why it is imperative that the UK avoids complacency. The approach set out in HM Government's Integrated Review Refresh²⁶ is the right one. The UK must be continually, actively engaging with the world. The UK must look outward, focus on the common good and take a holistic approach to international affairs that sees all the levers (defence, diplomacy, overseas aid and soft power) available to it pulled in concert to maximise impact, what some commentators have referred to as 'smart power'.²⁷ There have been notable foreign policy successes in recent years, including AUKUS, CPTPP membership, the Windsor Framework and the Bletchley Declaration. However, the UK's privileged status should never be taken for granted. Continued vigilance and investment are both vital to ensuring the UK maintains its soft power. There are plenty of rivals, both friendly and hostile, who are continually looking to supplant the UK's position and, judging by our research, have the capacity to do so.

²³ HM Government, "Integrated Review Refresh 2023 Responding to a more contested and volatile world," Crown Copyright (2023), https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1145586/11857435_NS_IR_Refresh_2023_Supply_AllPages_Revision_7_WEB_PDF.pdf

²⁴ Officially the Quadrilateral Security Dialogue. It consists of four countries: the United States, Australia, India, and Japan.

²⁵ The Asian Century has been predicted (and debated) by academics for decades. The term is used to describe a 21st-century shift of economic, military and cultural power away from the Euro-Atlantic region towards Asia.

²⁶ HM Government, "Integrated Review Refresh 2023 Responding to a more contested and volatile world," Crown Copyright (2023), https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1145586/11857435_NS_IR_Refresh_2023_Supply_AllPages_Revision_7_WEB_PDF.pdf


²⁷ Richard L Armitage and Joseph S Nye, "CSIS Commission on Smart Power: A smarter more secure America," Center for Strategic & International Studies (2007), 071106_csissmartpowerreport.pdf (csis-website-prod.s3.amazonaws.com)

Section 4

Changing views of Russia







Changing views of Russia

Against the backdrop of Russia's full scale invasion of Ukraine in 2022, there is understandably significant interest in how Russia has performed in the Global Perceptions study this year. Discussing Russian soft power requires that we do not trivialise the horror and suffering the war has inflicted upon the Ukrainian people. Talk of rankings and ratings, of attractiveness and influence, can all too easily be seen as unbearably inane and superficial. But it matters. Public sympathy for the plight of Ukraine has strengthened the resolve of Western governments that have provided Ukraine with materiel and imposed sanctions on Russia, sometimes at considerable cost to themselves. Would NATO states be so willing to provide Ukraine with arms and aid if the peoples of the Euro-Atlantic region were hostile? Even authoritarian governments are responsive to public opinion, hence the Kremlin's specious narrative claiming the war is a 'special military operation'. Having for many years been subject to Russian misinformation, Ukraine itself has proved adept in the information war, recognising the absolute necessity of winning the battle for hearts and minds, both at home and abroad, to the war effort.

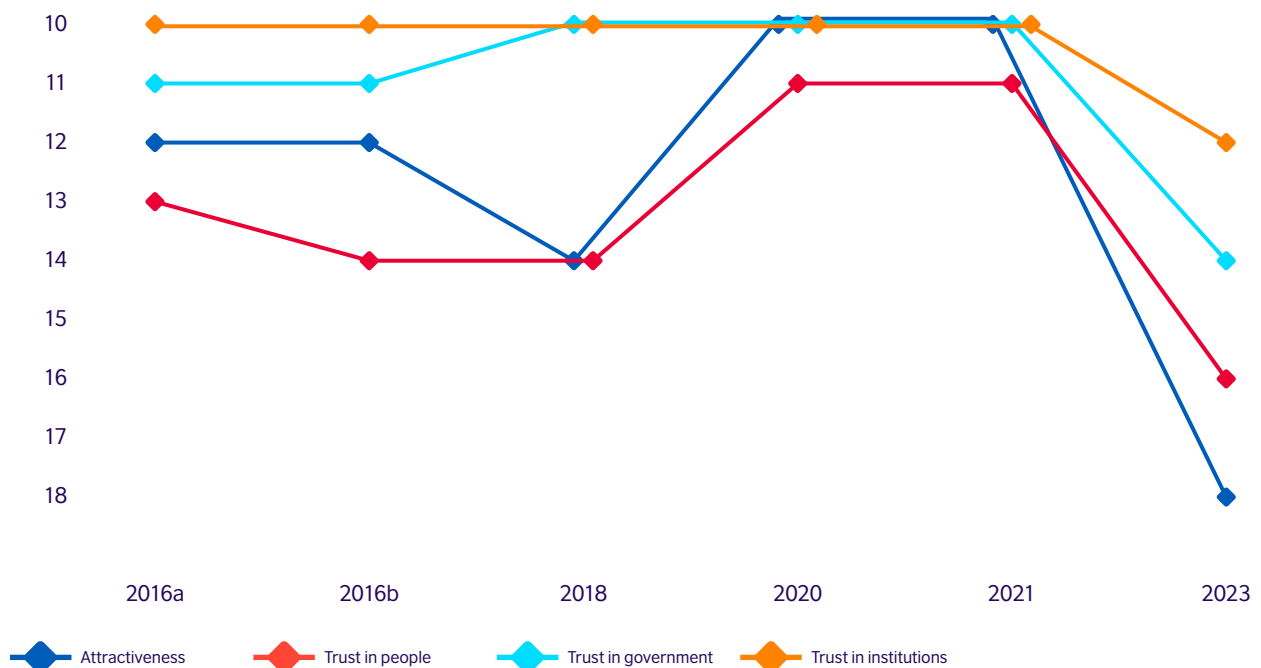
We did not ask any specific questions in the survey on the Russo-Ukrainian War but the metrics we have been tracking over successive iterations of the study do provide us with much needed insight into how 18–34 year olds view Russia's conduct. We could not survey in Russia because of the sanctions that are in place – and the potential risk to staff and participants.

To better understand Russia's standing in the world today, we need to start by looking back to the survey undertaken in spring 2016 (see figure 15 on page 51). Back then Russia's average ranking for overall attractiveness was twelfth with a rating of 44%. In the ensuing years Russia's ratings both for attractiveness but also for trust have proven surprisingly robust. As recently as 2021 it was joint tenth (with Brazil) for overall attractiveness with a rating of 54%. However, in June/July 2023, Russia ranked 18th with a score once again of 44%. This shows both a significant weakening of Russia's appeal but also, again, how countries across the Global South have been seeing significant uplifts in perceptions of their attractiveness over the past seven years, such that a rating that placed Russia 12th only seven years ago now leaves it languishing at the bottom of the rankings.

The scores for trust in the Russian government between 2016 and 2021 barely moved at all, with a score of 31% in spring 2016, 34% in 2018, 29% in 2020 and 32% in 2021. Well below the UK, Germany and Japan but still, in the autumn of 2021, placing the country tenth in the global mean rankings for the third time running and up from the 11th place recorded in 2016. In 2023 Russia ranked joint 14th (with Brazil), with a rating of 28%. Down on 2021, and lower than in any previous year of the study, but at first glance hardly a disastrous result. However, consideration of Russia's ratings for distrust reveals a stark decline in attitudes. Although both the Brazilian and Russian states were rated 28% for trust, the respective scores for distrust were 37% and 52%. Russia's NET trust rating in 2023 was -24%, 15 percentage points worse than the 2021 rating of -9%. With this sharp deterioration in its trustworthiness, Russia is left more dependent than ever on hard power.

Looking at the results from individual countries reveals the sharp deterioration of Russia's position across the majority of G20 states. With a few standout exceptions, Russia's ratings across the metrics tracked in the study are down, in some cases substantially so. Russia already polled relatively poorly in Western countries like Germany, Japan and the UK. In 2021, for example, the ratings for trust in the Russian government were significantly lower than the average score of 32%, coming in at respectively 17%, 14% and 21%. However, opinions on Russia varied more than for any other state; for example, where participants in Japan were deeply sceptical of the Russian government, participants in China regarded it as the most trustworthy of any in the G20 giving it a rating of 72%. In addition, there were also a significant number of countries, mainly those from the Global South, who awarded the Russian government ratings similar to those they gave the Western democracies. In Mexico, for example, the Russian and UK governments were practically neck and neck on 51% and 53% respectively.

Figure 15: Changes in Russia's average rankings for attractiveness and trust 2016-2023



Base: All participants in the G20 asked about each country [c. 4,000 per country].

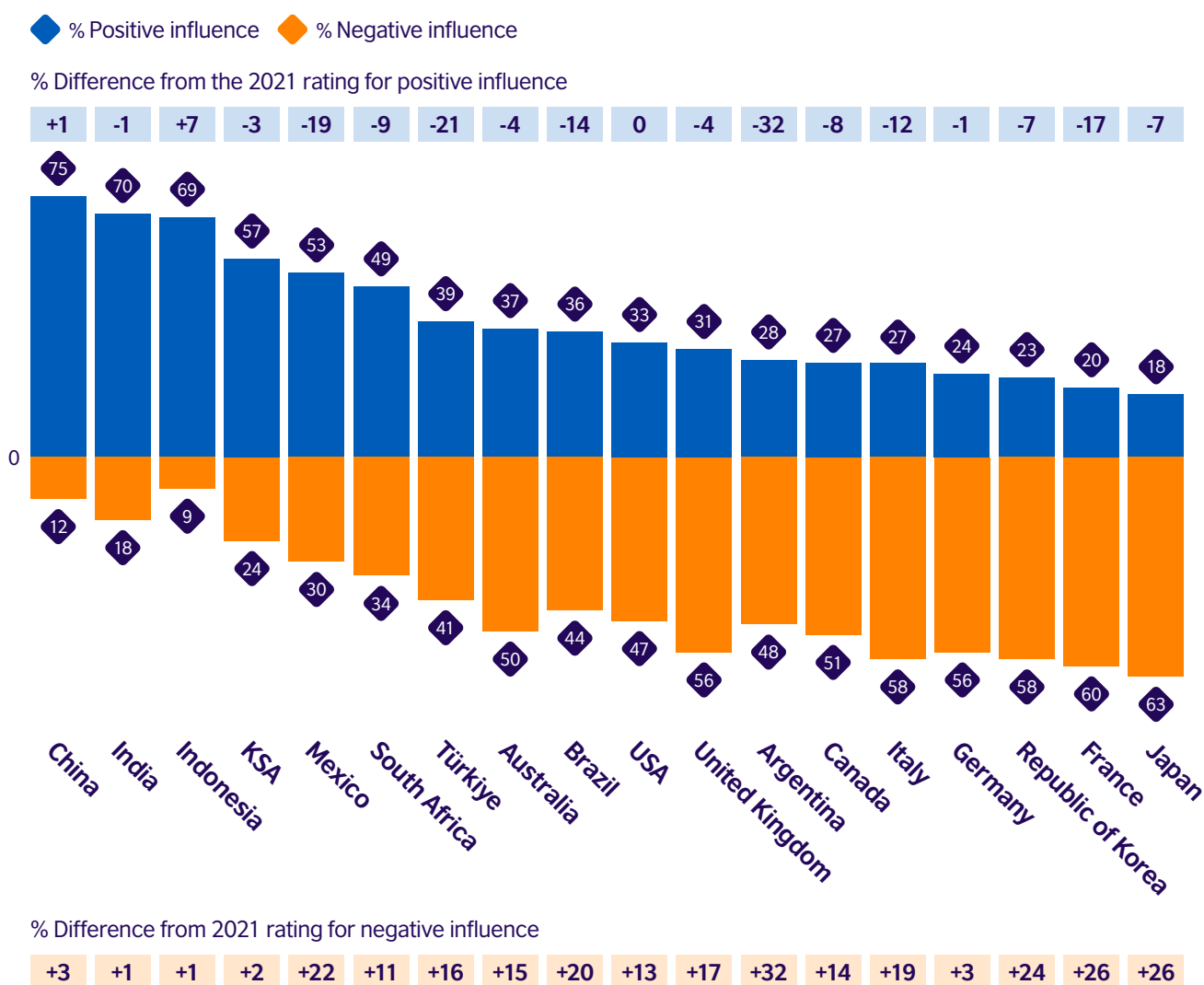
In 2023, while Western populations, views of Russia continued to be negative, a substantial proportion of those states that previously rated Russia relatively highly also adopted a more negative view. The trust in government ratings from Germany, Japan and the UK were down further at: 16%, 4% and 16%. In Mexico, the Russian government's score had fallen to 36% while the UK government's rating was unchanged on 53%. It's a similar story across Latin America. In Brazil, Russia's rating for this metric has fallen from 31% to 19%. In Argentina, 36% to 14%. In contrast, participants in China once again ranked the Russian government the most trustworthy in the G20 with an increased rating of 74%. The 'no limits' friendship appears to have the backing of young people.

China is not the only outlier, Russia's ratings in India, Indonesia and the KSA did not track the rest of the G20 nations either, with ratings and rankings for trust in government as follows:

- India 56% (11th) in 2021 and 57% (15th) in 2023
- Indonesia 41% (11th) in 2021 and 57% (eighth) in 2023
- KSA 43% (11th) in 2021 and 44% (13th) in 2023.

Figure 16: Russia's ratings for influence in the world by country in 2021 and 2023

How would you rate these countries on their overall influence in the world?



The rating and ranking data from India would appear contradictory, the rating is effectively static, but the ranking shows a sharp fall. This again can be explained by rising ratings for Mexico (51% in 2021, 61% in 2023) and Brazil (52% and 59%), while Russia's ratings barely moved. Again, we are seeing rising ratings for countries – specifically democratic, upper middle income countries – at the expense of more authoritarian states.

It is unclear precisely what is behind the sharp spike in levels of trust in the Russian government in Indonesia, though the two countries have long co-operated in military matters and have been exploring deepening their trading relationship. However, it is also worth noting that there have been other dramatic shifts in the ratings given by participants in Indonesia. Japan, for example, ranked first in both 2021 and 2023, but did so with a rating of 62% in 2021 and 80% in 2023. The data from KSA shows that Russia's position is effectively unchanged. The data for influence in the world (see figure 16 on page 52) and overall attractiveness follows a broadly similar pattern in all three countries:

- India: overall attractiveness 75% (eighth) in 2021 and 74% (11th) in 2023; influence in the world 71% (7th) and 70% (12th)
- Indonesia: overall attractiveness 68% (12th) and 70% (12th); influence in the world 62% (10th) and 69% (eighth)
- KSA: overall attractiveness 65% (ninth) and 63% (13th); influence in the world 60% (sixth) and 57% (11th).

What do these findings mean for Russia's status? Russia has clearly lost significant ground around the world, including with its fellow BRICs. It is worth completing the (pre-2023 expansion) BRICS quintet as the respective ratings and rankings from South Africa in 2021 and 2023 for attractiveness, trust in government and influence in the world add further clarity:

- Overall attractiveness 57% (15th) and 50% (18th)
- Trust in government 31% (12th) and 38% (15th)
- Influence in the world 58% (11th) and 49% (17th).

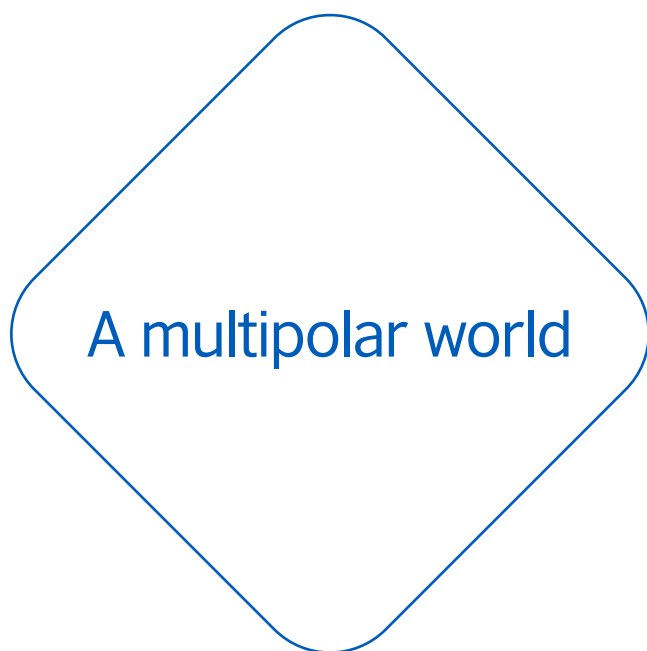
With opinion hardening around the world, the Russian state's leverage has been significantly degraded. Its efforts in pursuit of soft power, carefully cultivated over many years through the activities of an expansive, activist diplomatic network and considerable investment in institutions like the Russkiy Mir Foundation, Sputnik, RT and Rossotrudnichestvo, have been severely undermined. Even if the impact in individual countries varies, the reality is that Russia's relationships with other G20 countries can be seen as being increasingly transactional in nature and its international influence greatly diminished.

Section 5

The powers that will determine the future of geopolitics – Brazil, India, Indonesia, the Kingdom of Saudi Arabia, South Africa and Türkiye







Whether or not we are living in a multipolar world, recent events have revealed that there are regional and global powers that do not fit past categorisation, as they prioritise their own national interests in different ways to past powers. We have seen this in the reaction to the extensive economic sanctions the West has placed on Russia. Many states, including regional and global powers, have taken the opportunity to access Russian resources at heavily discounted prices. This new self-assertiveness, coupled with the increased power and influence these states wield, is going to be a key feature of geopolitics in the coming decades. Influential nations in the Global South – including G20 members like Brazil, India, Indonesia, the Kingdom of Saudi Arabia (KSA), South Africa, and Türkiye – will play a vital role in the nascent multipolar order.

These are both regional and globally important powers with a pivotal role in global supply chains, whether that be KSA's position as the gatekeeper of global oil or India vying to replace China as the world's manufacturing leader. They hold considerable sway due to their active engagement with regional fora like ASEAN, Mercosur, and the African Union. The significance of these six states also lies in their capacity and capability to leverage great power politics and act according to their national and global interests.²⁸ These states do not align with any particular major power bloc, instead often opting for a flexible, multi-aligned strategy based on self-interest. It is also important to recognise that while they can, and often do, work together, either bilaterally or in wider groupings, these powers should not be collectivised as a reconfigured Non-Aligned Movement.

Understanding and responding to their priorities will be critical to successful engagement – including securing their support for a renewed and revitalised RBIS. This applies to their governments, but also to their citizens who are increasingly influential, even in states where political and civil freedoms are restricted. Understanding the values and perceptions of the people will be crucial for identifying opportunities to establish trust and dialogue with these strategically vital global players.

Our research reveals there are some common patterns. Young people from all six states favour the high income liberal democracies, especially Japan and the UK, across key metrics. Mirroring the broader G20 trend for attractiveness, Italy and the UK perform strongly within a leading pack (see table 5 on page 57). This pack again consists of the G7 states and Australia. In terms of NET attractiveness, the UK ranks in the top five in all six states. Japan does particularly well, ranking among the top three in India, Indonesia, KSA, and Türkiye. Japan also exhibits a notable upward push (+13%) in NET attractiveness²⁹ among these six states compared to its G20 average. Japan, the UK, and Canada excel for NET trust in government (see table 6 on page 59), again mimicking the wider trend.

²⁸ "Alliances in a Shifting Global Order: Rethinking Transatlantic Engagement with Global Swing States" German Marshall Fund (2023)

²⁹ The rating for NET attractiveness is the sum of the rating for overall attractiveness minus that for unattractiveness.

Table 5: NET attractiveness of G20 states by country
 How attractive overall do you find each of the following countries?

How these six countries rated the G20 countries

Countries being rated	%	How these six countries rated the G20 countries					
		Brazil	India	Indonesia	KSA	South Africa	Türkiye
Argentina		37	47	53	35	57	-2
Australia		66	63	78	50	67	46
Brazil		N/A	56	44	36	62	20
Canada		70	72	66	48	74	61
China		45	11	62	42	56	2
France		76	74	68	49	78	44
Germany		71	71	71	49	73	59
India		27	N/A	9	8	36	-39
Indonesia		24	53	N/A	55	46	-15
Italy		75	67	76	68	76	76
Japan		69	75	89	66	69	67
KSA		12	66	77	N/A	46	-15
Mexico		65	60	46	37	46	2
Republic of Korea		52	60	72	54	57	46
Russia		8	59	60	42	23	11
South Africa		45	62	32	23	N/A	-17
Türkiye		45	59	82	62	57	N/A
UK		72	77	78	63	80	58
USA		80	77	61	59	77	53

Base: 1,000 per country

However, Japan's ascendancy and Canada's waning position are more pronounced. Japan ranks first in Indonesia, KSA, and Türkiye, and third in India. Comparatively, Canada's NET trust scores rank in the mid-to-high range for these states, following a downward trend since late-2016. Nevertheless, Canada ranks first in Brazil and South Africa, far outperforming Japan in seventh and eighth place. The UK is in the top three for NET trust in government in all six states except Türkiye, where it ranked sixth, though it has been trending positively over time. Japan and the UK are also the top performers for having a positive influence in the world. Japan scores in the top three for all six states. The UK scores in the top three for all but Türkiye, where it again ranks sixth, behind other liberal democracies including the Republic of Korea.

The closing gap in NET attractiveness between Türkiye and the Republic of Korea and the leading pack of the G7 and Australia is especially narrow within these six states. Türkiye's performance is particularly notable. It ranks second in Indonesia and fourth in KSA for NET attractiveness and shows some of the largest increases in NET attractiveness over time in Brazil, India, Indonesia, and South Africa. Similarly, Türkiye ranks in the top five for NET trust in government in Indonesia, KSA, and South Africa. The Republic of Korea is ranked second for NET trust in government in KSA and Türkiye, and in the top five for its influence in the world in Brazil, KSA, and Türkiye.

The results again reveal the role of cultural and geographical proximity. Mexico scored 66% for NET attractiveness in Brazil in 2023, far surpassing its G20 average (31%). Similarly, Australia leaped to third place for NET attractiveness in its Pacific partner, Indonesia, while ranking seventh to ninth for the other five states. Indonesia and KSA have a mutually positive relationship, reflecting the close cultural and economic ties between these Muslim-majority states. For Indonesians, KSA ranks fifth for NET attractiveness, second for trust in government, and second for its influence in the world. This is reciprocated among participants in KSA, with Indonesia ranking sixth, third, and seventh for the same metrics.

Looking at the P5 beyond the UK reveals a more varied performance. The USA ranks in the top five for overall attractiveness in all six states except Indonesia, where it ranks 12th. However, trust in the US government differs between states and fluctuates across years. It currently ranks second and third in India and Brazil, up from ninth and 16th place in 2018, and 11th in KSA and Indonesia, shifting from sixth and 17th place in 2020. In Türkiye, trust is now NET positive (5%, eighth), a notable improvement from -47% (17th) in 2018. France also shows variability, scoring relatively low for NET trust³⁰ in government in Indonesia (22%, 13th), KSA (34%, 16th), and Türkiye (-9%, 13th), despite ranking ninth for NET attractiveness in these states. China's NET attractiveness in Indonesia (62%) far exceeds its G20 average and is also relatively stronger in South Africa, Brazil, and KSA. China ranks in the top five for positive influence in the world in Indonesia, KSA, and South Africa.

While it generally ranks low for trust in government, it ranked sixth in KSA. China ranks last across all these metrics in India. However, its scores have improved since 2021 (when the ratings may have been affected by Sino-Indian border tensions). Russia's performance among these countries is complex, as discussed in detail above. The P5's varied and disconnected performance emphasises the need to understand the independent global outlook of these six states, rather than placing them between great powers.

³⁰ NET trust is trust minus distrust.

Table 6: NET trust in government of G20 states by country
Thinking generally about government, to what extent do you distrust or trust the government from each of the following countries?

How these six countries rated the G20 countries

		Brazil	India	Indonesia	KSA	South Africa	Türkiye
Countries being rated							
	Argentina	-31	30	26	5	15	-20
	Australia	32	51	47	23	44	19
	Brazil	N/A	38	15	3	12	-6
	Canada	47	49	47	24	45	31
	China	-17	-20	17	27	15	-22
	France	27	49	22	4	37	-9
	Germany	29	49	52	27	29	34
	India	-6	N/A	-1	-9	6	-33
	Indonesia	-15	40	N/A	36	7	-8
	Italy	32	53	47	22	40	33
	Japan	28	60	77	51	25	55
	KSA	-25	47	67	N/A	8	-22
	Mexico	15	41	19	8	0	-8
	Republic of Korea	16	44	51	38	19	37
	Russia	-47	33	43	13	-5	-6
	South Africa	7	49	10	18	N/A	-12
	Türkiye	6	36	52	35	39	N/A
	UK	40	64	54	36	44	29
	USA	32	63	29	18	14	5

Base: 1,000 per country



The role of soft power in a multipolar age

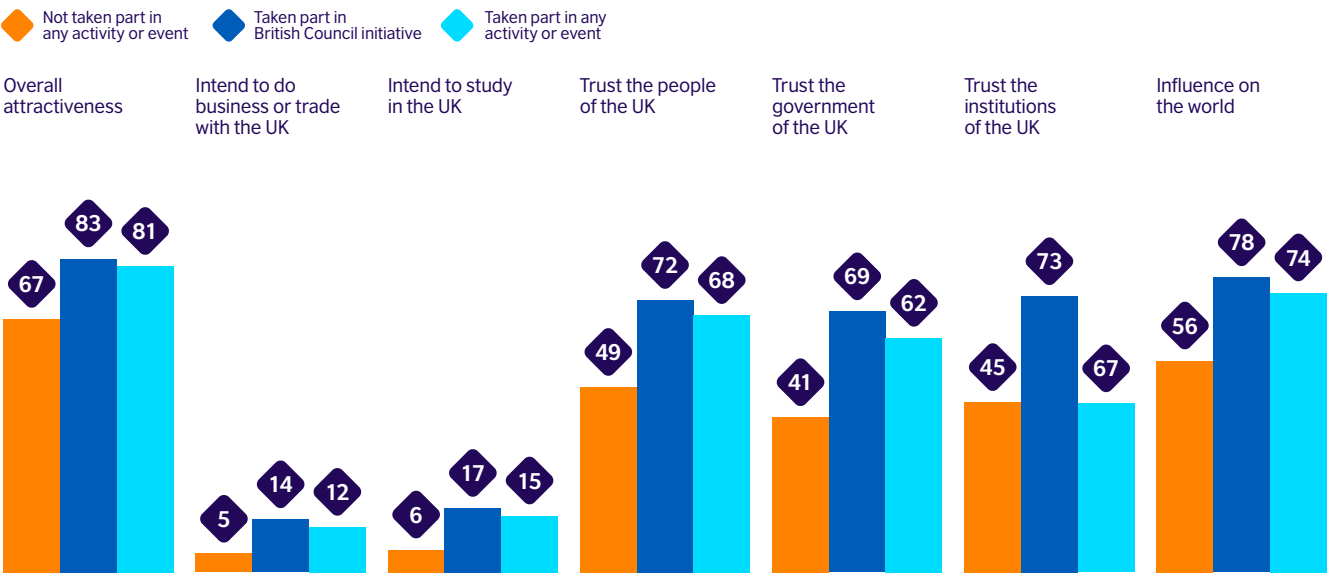
As more states gain the ability to say no when pressured or coerced to act, the power of persuasion has increasing value. Soft power will be vital to drawing the support of these six powers, whether for the renewal of the RBIS or for collective international action on global challenges like climate change and global health crises. Consequently, being trusted will give the UK a diplomatic edge in a multipolar era.

The UK is perceived well across the Global South, and in the Commonwealth especially. Its position has also strengthened over time in KSA and Türkiye, albeit from a relatively low starting point. The data suggests a wider gap in Latin America, where the UK is less familiar than Canada, the USA and other European states like France and Italy, but also the primary ex-colonial powers, Portugal and Spain.

Maintaining and strengthening connections and good will between the people of the UK and the peoples of these increasingly influential countries will require investment in the networks and experiences that foster trust and create the conditions favourable to collaboration. Cultural and educational initiatives, like festivals or exchange programmes, play a key role. These initiatives offer a safe or neutral platform for positive engagement and trust-building during periods of political tension and post-conflict scenarios; and can provide the foundations for tackling the more difficult and risk-laden issues relating to long-term prosperity and security. The same principles underpin the deepening of existing ties. The UK needs to pay attention to its offer in order to stand out in an increasingly competitive setting where traditional western cultural powers already have a strong presence and new players are taking the stage.

The British Council, working with the UK's excellent cultural and educational institutions, is uniquely placed to nurture the networks and relationships between people in the UK and other countries via its collaborative work across the arts, culture, education, science and language learning. Global Perceptions study data show that cultural relations initiatives – especially those curated by the British Council – are linked with higher levels of trust in government (see Figure 17 on page 61). The UK's average score for trust in government in the G20 was 54%. However, for those who had participated in a UK cultural initiative, the score was significantly higher at 62%. Where this engagement was curated by the British Council, it was higher still at 69%. The British Council's traditional bilateral relationship building has clear value for fostering trust between the UK and these six states. There may also be scope for working with partners from these countries in other parts of the world, recognising that they have knowledge and networks that the UK may not possess.

Figure 17: While taking part in any kind of activity has a positive impact on key metrics, taking part in a British Council initiative pushes ratings higher



Base: All participants in the G20 [19,601 or 17,001]



The opportunities for engagement

We can pinpoint the opportunities for cultural engagement in these six states through Global Perceptions study metrics on where young people intend to study, visit, conduct business or trade, or experience arts and culture (see tables 7-10 on pages 63-66).

For young people in Brazil, the UK is third for intentions to study (9%), behind the USA (28%) and Canada (14%). It is in joint fifth place for cultural consumption (18%), well behind the USA in first place (30%). The UK is fifth (7%) for intentions to do business/trade. The world's biggest economies (USA, China and Japan) are usually ahead of the UK for this metric which is a consistent pattern for much of the G20, barring some exceptions likely related to cultural and geographic proximity. Consequently, we see the USA on 24%, followed by China (11%) but then Canada in third (10%), ahead of Japan (9%). The USA is also the top destination for tourism (40%), with the UK in sixth place (18%).

In India, the UK is in second place for intentions to study (21%), behind the USA (28%), with Australia and Canada both in third (16%). The UK is third for cultural consumption (22%), behind Japan (26%) and the USA (25%). The UK is in a strong position in terms of business/trade on 26%, behind the USA (36%) but ahead of Japan (23%). Despite the closer ties one might expect from their membership of the BRICS group, China scores poorly on this metric (8%) as do Brazil (joint last on this metric on 5%) and South Africa (8%). Russia is in a stronger position than the other BRICS in seventh place (17%). The UK is also second for tourism (21%), with the USA first (on 27%).

Young Indonesians rank the UK second for intentions to study (28%), behind Japan (39%). It is in joint fourth place for cultural consumption (20%). Again, Japan is first with a rating of 54%. Cultural and geographic proximity is strongly evident as the Republic of Korea (37%), KSA (22%) and Türkiye (20%) all perform strongly on this metric. The UK is in seventh place for intentions to do business/trade (14%). Again, cultural and geographic proximity is clearly playing a strong role, alongside the expected preference for the world's biggest economies. Japan is first (34%), China second (24%), the USA third (23%), followed by the Republic of Korea and KSA on 19% and Australia (16%). The UK is fourth for intentions to visit (26%). Again, Japan is far and away the most attractive destination with 56% saying they intend to visit.

In KSA the UK is second for intentions to study (15%), behind the USA (18%). It is joint third for cultural consumption (14%), with Türkiye first (20%) and Japan and the USA in joint second (16%). Türkiye performs strongly across all metrics, coming third for intentions to study (13%); and second for business/trade (15%), behind China (20%) but ahead of the USA (14%) and Japan and the UK (both on 11%). Türkiye is also first for tourism (31%), with the USA second (21%) and the UK in a three way tie for third with Italy and Japan on 16%. Yet again we see the potency of cultural and geographical proximity. These findings also reveal, at least in part, the reasons for Türkiye's sharp rise through the rankings for trust and attractiveness.

Table 7: Intentions to study in G20 states by country

Please select any of the following countries that you intend to study in (at school, college or University)

How these six countries rated the G20 countries

		Brazil	India	Indonesia	KSA	South Africa	Türkiye
Countries being rated	Argentina	5	6	2	5	3	2
	Australia	5	16	22	6	6	4
	Brazil	N/A	6	2	5	3	3
	Canada	14	16	10	12	12	10
	China	3	5	9	6	12	2
	France	9	9	9	7	8	7
	Germany	7	14	19	11	12	15
	India	2	N/A	3	4	3	2
	Indonesia	2	7	N/A	5	2	2
	Italy	7	8	5	8	5	9
	Japan	7	13	39	9	8	7
	KSA	1	7	12	N/A	4	3
	Mexico	4	6	2	5	3	2
	Republic of Korea	4	7	16	6	5	7
	Russia	2	9	6	5	5	4
	South Africa	2	6	2	5	N/A	2
	Türkiye	3	5	9	13	3	N/A
	UK	9	21	28	15	27	10
	USA	28	28	24	18	32	20

Base: 1,000 per country

Following the established pattern, young people in South Africa rank the UK in second place for intentions to study (27%). The UK is also second for intentions to visit (33%). It is third for intentions to do business/trade (25%) and joint fifth for cultural consumption (17%). The USA is in first place across all five dimensions, rating respectively 32%, 41%, 34% and 22%. China also performs very strongly across the metrics in South Africa, coming second for business/trade (33%) and cultural consumption (21%), and joint third for study (12%) and fourth for tourism (24%).

In Türkiye the UK is in joint third place with Canada for intentions to study (10%), the USA is the most popular choice (20%) followed by Germany (15%). It is joint third for cultural consumption with the Republic of Korea (14%). Italy leads on this metric (29%) with four countries in second place on 20%: France, Germany, Japan and the USA. The USA is the most attractive country for business/trade on 18%, closely followed by Germany (17%). China is third on 10% with the UK in joint fifth on 8%. The UK is also fifth as a place to visit (14%), with Germany first (28%), Italy second (25%), then the USA (23%) and France and Japan (both 16%).

Table 8: Intentions to visit G20 states by country

Please select any of the following countries that you intend to visit (again)

How these six countries rated the G20 countries

<div><div><div>%</div></div></div>	Brazil	India	Indonesia	KSA	South Africa	Türkiye
Argentina	18	8	4	6	7	5
Australia	13	22	20	9	14	7
Brazil	N/A	9	4	7	18	7
Canada	21	20	11	14	15	13
China	10	8	14	13	24	7
France	23	19	17	14	25	16
Germany	15	15	16	11	20	28
India	6	N/A	5	8	10	5
Indonesia	6	10	N/A	14	7	3
Italy	24	15	14	16	22	25
Japan	19	23	56	16	17	16
KSA	6	19	30	N/A	13	7
Mexico	16	9	4	6	13	5
Republic of Korea	11	13	36	10	13	12
Russia	5	17	9	8	9	10
South Africa	8	8	2	7	N/A	3
Türkiye	7	8	23	31	10	N/A
UK	18	26	26	16	33	14
USA	40	36	19	21	41	23

Base: 1,000 per country

The UK is a credible partner across these six influential states. Unlike the USA or China, the UK consistently excels across the metrics for attractiveness, trust in government, and influence in the world. The UK's real comparator among these states is the increasingly attractive and respected Japan. The intentions to engage metrics highlight the enduring strength of the USA's hard and soft power, including its economic clout and the cultural domination of Hollywood, as well as the appeal of its Ivy League universities. However, the data also reveals that the UK has a lot to leverage here, especially in the field of education. Policymakers should continue to capitalise on the UK's educational appeal. Scholarship programmes and astute marketing of the UK's universities in these countries are worthwhile investments. Similarly, fostering research partnerships between UK institutions and their counterparts in India, Türkiye and other states in the Global South will bolster the UK's reputation.

International students bring huge cultural and economic benefits to the universities and local communities that host them, and should be encouraged to come to the UK. This is not to neglect the possibilities for cultural engagement. Targeted engagement drawing on the UK's cultural jewels through bilateral cultural seasons can deliver a step change in perceptions to drive increased interest in visiting and doing business with the country.

Despite the challenges that have confronted us in recent history, there is at least hope for a better tomorrow. The rise of these six powers may bring new complexities to geopolitics but if treated with equity and respect they can be engaged as partners to build a brighter future. The UK enjoys high levels of trust and has a distinctive and attractive offer, both in terms of its soft power assets but also its values. By bringing people together and fostering trust the UK can begin the process of revitalising the RBIS as part of an order that works for all.

Table 9: Intentions to do business/trade with G20 states by country
Please select any of the following countries that intend to do business/trade with

How these six countries rated the G20 countries

		Brazil	India	Indonesia	KSA	South Africa	Türkiye
Countries being rated	Argentina	7	6	2	4	4	3
	Australia	4	17	16	6	8	3
	Brazil	N/A	5	3	5	8	3
	Canada	10	15	6	8	9	6
	China	11	6	24	20	33	10
	France	6	12	6	8	11	7
	Germany	6	12	8	10	13	17
	India	3	N/A	6	7	8	3
	Indonesia	3	7	N/A	8	3	3
	Italy	7	8	4	7	9	9
	Japan	9	18	34	11	13	9
	KSA	3	14	19	N/A	10	6
	Mexico	5	6	3	5	5	2
	Republic of Korea	4	7	19	7	8	6
	Russia	4	13	6	6	9	8
	South Africa	3	6	2	5	N/A	2
	Türkiye	3	5	11	15	5	N/A
	UK	7	21	14	11	25	8
	USA	24	27	23	14	34	18

Base: 1,000 per country

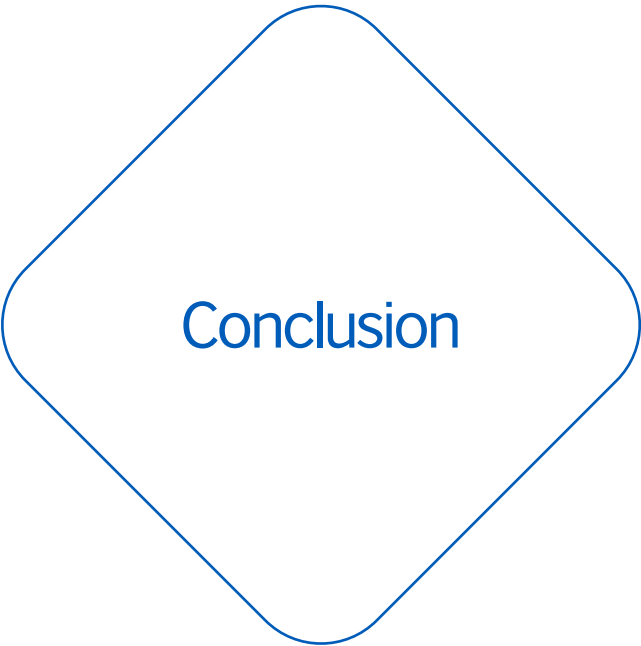
Table 10: Intentions to experience the arts and culture of G20 states by country

Please select any of the following countries whose arts and culture you intend to experience?

How these six countries rated the G20 countries

Countries being rated	%	Brazil	India	Indonesia	KSA	South Africa	Türkiye
Argentina		12	8	3	5	7	6
Australia		11	17	9	7	8	8
Brazil		N/A	9	5	7	17	8
Canada		18	16	5	8	9	14
China		14	10	18	10	21	9
France		25	19	12	9	18	20
Germany		15	15	10	9	13	20
India		9	N/A	8	8	18	5
Indonesia		7	12	N/A	9	9	4
Italy		28	16	11	11	19	29
Japan		27	26	54	16	22	20
KSA		7	14	22	N/A	12	6
Mexico		16	11	5	8	16	7
Republic of Korea		16	14	37	10	15	14
Russia		7	14	8	8	9	10
South Africa		12	11	4	5	N/A	4
Türkiye		11	10	20	20	10	N/A
UK		18	22	20	14	17	14
USA		30	25	13	16	22	20

Base: 1,000 per country



The emerging multipolar world is a complicated, unpredictable one. The RBIS is being tested by revanchist states and non-state actors that seek to shatter the status quo. There is a serious risk of international affairs descending into a complex, constantly shifting, zero sum struggle between rival powers. Such chaos carries with it an increased chance of conflict and violence. In the face of the horrors inflicted on the innocent by terrorism and atavistic imperialism, talk of soft power, and of perceptions of attractiveness and trust can seem dangerously naive and inane. And yet a country's soft power, based on values and trust, provides the means to navigate this new complexity. To be seen as a positive, stabilising influence that brings balance and sanity to international affairs carries great weight in the face of such threats.

In a multipolar world, the ability to persuade and influence is arguably more important than the capacity to coerce. Coercion, through the application of economic and military pressure and inducements, can and often is a viable, even vital approach to international affairs, but it is a double edged sword that can alienate and divide. In a multipolar world, which by its very nature is prone to be more volatile and competitive than what we have experienced in the past, exerting coercive power can lead to even greater chaos. Whether directly involved or simply an interested party, state and non-state actors will react to any hard power intervention to secure their strategic position. They might be driven to seek alliances or to invest in countermeasures, like expanding defence budgets and information operations. Further, unlike in the bipolar world of the second half of the 20th century, in a multipolar world it is much harder to predict these reactions; parties have more options and may break in unexpected ways.

Soft power, the opposite of coercion, brings parties together voluntarily. The trust, familiarity and understanding that comes from soft power makes international relations more predictable and orderly. It reduces the risk of conflict and where conflict does arise, there is a greater chance of success in efforts to de-escalate, promote peace, and avoid violence. Soft power can serve as an inhibitor; a calming agent that can take the heat out of conflict, and create an environment more conducive to dialogue. To be trusted is to be considered a part of the solution rather than the problem.

This is why the findings of Global Perceptions 2023 are so important. Feelings aren't facts, but these sentiments, about attractiveness, trust and values, have an enormous influence on international affairs. What the results of the study reveal is that far from being "a 'small island' that the rest of the world should simply ignore", as the Kremlin would have it,³¹ the UK is seen as a widely trusted and influential global actor.

The combination of hard and soft power capabilities, and being recognised as acting on the international stage in accordance with the values that people around the world respect and admire, is essential to the UK's international influence and leverage. Maintaining and building on the UK's strong position requires constant vigilance and investment. Trust doesn't develop overnight. The UK's current status has been painstakingly built up over successive generations. The British Council, for example, will shortly be celebrating its 90th anniversary. Fostering the long-term relationships and networks, and the human and social capital, that underpin the UK's soft power requires sustained, strategic resourcing.

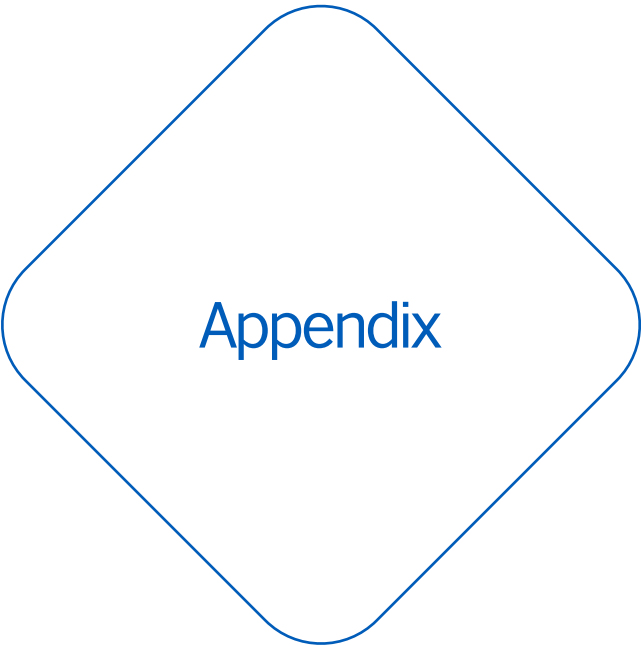
Trust comes from familiarity, intimacy, sharing, knowing and understanding. To build trust means conducting both high level strategic dialogues between ministers and officials and encouraging young people to come to the UK to live, work and study. That lived experience has a transformative impact on perceptions,³² in turn driving future decisions that have significant implications for the UK's security and prosperity.

If the UK is to keep ahead of its rivals, it must be open, interested and engaged with the world. The entire budget for international affairs – for the diplomatic network, defence, intelligence services, international trade, overseas aid, the British Council and BBC World Service – needs to be increased. Arbitrary targets are not necessarily helpful, but in such a dangerously unstable world it would seem prudent to be spending at least 4% of GDP across these areas. The potential dividends in terms of increased prosperity, security and global influence would outweigh the costs. The UK must strive to uphold and strengthen the RBIS, while recognising that its imperfections need addressing. Developing renewed and equitable partnerships with rising powers like India, to deliver meaningful change that gives countries across the Global South a fair stake, will be crucial to building legitimacy and resilience in any new model.

It would be all too easy to be pessimistic, fearful even of the chaos that threatens to be unleashed by the emergence of a multipolar order. Certainly, we must never underestimate those that are actively deploying every means available to them with the aim of diminishing the UK's international influence such that it actually becomes a small island nobody cares about. Yet the UK is a strong position. Even its strategic competitors trust and respect it and recognise it as a positive actor on the international stage. It is well placed to bring parties together to meet global challenges and build support for the renewal of the RBIS. By drawing on its soft power the UK can help the world successfully negotiate the uncertainty and complexities of the new multipolar order to build a more secure and prosperous tomorrow.

³¹ James Rogers, "Discursive statecraft: Responding to national positioning operations," Council on Geostrategy, 2021, <https://www.geostrategy.org.uk/research/discursive-statecraft-responding-to-national-positioning-operations/>

³² Alistair MacDonald, "The sources of soft power," British Council, 2020, <https://www.britishcouncil.org/sites/default/files/sources-soft-power-report-perceptions-success.pdf>



Survey questions and methodological approach

These are the questions posed in the 2016, 2018, 2020, 2021 and 2023 studies that are covered in this report.

Note where reference is made to countries, participants were presented with a list of the G20 countries. Unless otherwise noted below these lists excluded participants' home states:

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?

And taking everything into account, how would you rate these countries on their overall influence in the world?

Which THREE of the values listed below, if any, do you think are the most important values that countries around the world should support and encourage in the 21st century?

Please select THREE values.

1. Inclusiveness (providing equal opportunities for all in society)
2. Respecting different cultures and valuing diversity
3. Equality (providing equal rights for people regardless of their age, gender, race, ethnicity, disability or sexual orientation)
4. Respect for others
5. Tolerance of others' views
6. Freedom (e.g., freedom of thought, conscience, religion, opinion, expression)
7. Sustainability (e.g., care for the environment, protecting nature)
8. Working for a peaceful world, ending armed conflict
9. Valuing tradition
10. Co-operation, solidarity (working together to a common aim, caring for and supporting others)
11. Personal responsibility
12. Looking after the vulnerable in society, reducing gaps between the rich and poor
13. Honesty / transparency
14. Religion and spirituality / religious values
96. Other
98. None of these
99. Don't know
97. Prefer not to say

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

Which THREE of these countries do you consider have values which are close to those of [your own country]?

Please select THREE countries.

97. None of these

Please select any of the following countries...

- That you have visited
- That you have done business / trade with
- That you have studied in (at school, college or university)
- Whose arts and culture you enjoy
- Where you have lived and / or worked for at least six months

98. None of these

And now thinking about your future plans...

Please select any of the following countries...

- That you intend to visit (again)
- That you intend to do business / trade with (again)
- That you intend to study in (again) e.g., at school, college or university
- Whose arts and culture you intend to experience (more) in the future
- Where you intend to live and / or work (again) for at least six months

98. None of these

Technical details of the soft power survey

The British Council commissioned Ipsos UK to conduct the latest survey in early 2023, with fieldwork taking place between June and July 2023. Ipsos interviewed a sample of 19,601 adults aged 18–34 across 18 countries. Table 11 below gives details on the samples from each country. Interviews were conducted online in all 18 countries. 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.³³ Ipsos UK has published the detailed data tables that underpin the findings of the 2023 survey on their website.

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.

Table 11. Methodology and sample size by country

Argentina		Australia		Brazil	
Method	Online	Method	Online	Method	Online
Sample size	1,000	Sample size	1,000	Sample size	1,000
Canada		China		France	
Method	Online	Method	Online	Method	Online
Sample size	1,000	Sample size	1,001	Sample size	1,000
Germany		India		Indonesia	
Method	Online	Method	Online	Method	Online
Sample size	1,000	Sample size	1,000	Sample size	1,000
Italy		Japan		Kingdom of Saudi Arabia	
Method	Online	Method	Online	Method	Online
Sample size	1,000	Sample size	1,000	Sample size	1,000
Mexico		Republic of Korea		South Africa	
Method	Online	Method	Online	Method	Online
Sample size	1,000	Sample size	1,000	Sample size	1,000
Türkiye		United Kingdom		United States of America	
Method	Online	Method	Online	Method	Online
Sample size	1,000	Sample size	2,600	Sample size	1,000

³³ All figures from participants are based on self-reported behaviours, for example, participation in events involving British Council, language proficiency and travel. These figures can be subject to over-claim or mis-interpretation.

