

# Sources of soft power

How perceptions determine  
the success of nations



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# Foreword

The UK is a ‘soft power superpower’. The culture of the UK, both in the narrow sense of arts or sport but also in the wider sense of the values and civil and political freedoms of the people of the UK, is absolutely central to that privileged status. This report explores the impact of our world-class universities and museums and galleries, our press and judicial freedoms and a host of other socio-cultural factors on attitudes towards the UK. Perceptions of a country have real-world consequences: being liked increases the probability of someone choosing to visit, study in and do business/trade with a country. A country that is trusted and respected will be listened to by others, strengthening its international influence. Engagement, above all the immersive experience of working, studying and living in a country, substantially increases the positive perceptions that drive attractiveness and trust, which in turn generates interest in further engagement.

This report confirms the UK is in a leading position in terms of its soft power, but it also reveals that its lead is a fragile one, a fact confirmed by the most recent edition of the Portland Soft Power 30 index that saw France overtake the UK. In comparing international perceptions of China, Germany, India, Japan, Russia, the UK and the USA, the report highlights how, with only a very slight shift in attitudes, other liberal democracies, like Germany and Japan, could also very quickly overtake the UK. There is no room for complacency. Regardless of what happens with Brexit, the UK must remain a liberal, outward-looking nation, open and engaged and committed to the common good of our shared humanity. What the research demonstrates is that any turn away from that would result in a substantial loss in both economic output and international influence.

In practical terms what is needed is investment in our overseas networks and our educational and cultural institutions that are so core to the UK’s international attractiveness. Crucially the data confirms that the UK’s commitment to international development plays a very significant part in shaping positive attitudes towards the UK. It must be maintained. The UK’s future success also means reform of the country’s immigration rules and processes to encourage young people to visit, study and work in the UK, to get that immersive experience of living in the country that opens up further opportunities to engage. Last but by no means least, it requires an activist foreign policy approach from the UK government that is rooted in the nation’s values and demonstrates a commitment to multilateralism and global progress on human rights and international issues like climate change.



**Sir Ciarán Devane,**  
Chief Executive

# Executive summary

The UK's position as a 'soft power superpower' is well known. The results from the British Council's 2018 youth perceptions survey of the G20, and those of various other rankings such as the Portland Soft Power 30, agree that the UK is in a leading position. Yet the data also reinforces the view that the UK is very much first among equals. Detailed analysis of the results from the British Council's perceptions survey reveals that the UK is only marginally ahead of its closest competitors – compare its results for overall attractiveness (81 per cent) with those from Germany (79 per cent) and Japan (78 per cent). That precariousness is underlined by the recent publication of the 2019 edition of the Portland Soft Power 30, which saw the UK fall to second place behind France.

A country's soft power is not guaranteed. The example of the USA shows that. Having been the pre-eminent hard and soft power for the latter half of the 20th century and the early years of the current one, it has since lost much of the goodwill and trust it once could draw on to realise its strategic objectives. Today, while the USA remains the world's most powerful nation, its government records the highest score for distrust of any in the G20, leaving it increasingly reliant on its hard power to coerce others to align with its international agenda. However, in a multipolar world with growing competition for influence, success is increasingly dependent on voluntarism and networks, on securing support and agreement through trust and goodwill. Multilateral action on vital international issues such as climate change comes not from coercion but through soft power, on parties having faith that each will deliver on the commitments they have made to one another.

Understanding the drivers of soft power has long been a priority of the British Council's research programme. 2018's *The value of trust*<sup>1</sup> report identified the qualities most strongly associated with trust in the people and government of the UK.

These were that the UK:

- was perceived as open and welcoming
- has a free and fair justice system and world-leading arts and culture
- had a government that treats everyone fairly, contributes its fair share to aid, and works constructively with others around the world.

Openness was the single strongest driver of trust in people, followed by contribution to development and a free justice system. For trust in government, the state's contribution to development was the most prominent driver, followed by works constructively with other governments and openness.

The analysis of the 2018 perceptions survey presented in this report found that in a comparison of China, Germany, India, Japan, Russia, the UK and the USA, Germany and Japan showed remarkably similar results to the UK for the metrics highlighted as most crucial to trust. This helps to explain why the data on overall attractiveness and trust in people, government and institutions tracks so closely for these likeminded states.

The UK came:

- first for perceptions of a free and fair justice system and for world-leading arts and culture
- second to Japan for openness
- second to Germany for contribution to development and treating everybody fairly
- third, behind both Germany and Japan, for works constructively with other governments.

Again, the closeness in the results emphasises the UK's enviable but vulnerable position as first among equals. However, what also emerges from the data is that soft power is very much rooted in values. It's the values of free, open, diverse, democratic societies like the UK and Germany that result in these states being the most attractive and trusted.

1. British Council (2018) *The value of trust*. Available online at: [https://www.britishcouncil.org/sites/default/files/the\\_value\\_of\\_trust.pdf](https://www.britishcouncil.org/sites/default/files/the_value_of_trust.pdf)

The analysis also looks at the factors that drive attractiveness. Having world-leading universities, being at the cutting edge of technology and having an education system that fosters creativity and innovation emerge as the most important drivers of overall attractiveness but are only slightly ahead of good public services and world-leading sports teams and events. However, there are significant differences when one looks at intentions to do business/trade. While being seen as a global power has no impact on overall attractiveness, it is a key driver of finding a country attractive for doing business/trade, along with perceptions of science and technology and world-leading universities. These three qualities are significantly ahead of other factors.

The UK generally performs well on the socio-cultural qualities that drive trust and overall attractiveness, but lags behind the other focus countries in two key metrics:

- is a world power
- has world-leading science and technology.

This ought to be a concern for policymakers as it presents a potential weakness in the UK's international appeal. If competitor countries pull further ahead of the UK on these metrics, that may undermine the UK's comparative advantage in the years ahead with implications for foreign direct investment (FDI) and trade.

The analysis also considered the role of familiarity in a state's soft power. Prior experience of a country has a substantial, positive impact on perceptions. For the UK the uplifts for different forms of engagement averaged across the 20 qualities are:

- have visited versus not visited 14 per cent
- enjoy arts and culture versus do not enjoy 14 per cent
- have studied versus not studied 16 per cent
- have done business/trade versus have not done business/trade 15 per cent.

What the analysis demonstrates is the particular value of the experience of studying, working and living in a country. This can be seen in the increase in positive perceptions of the UK's contribution to international development – the most important driver of trust in government. The uplifts are:

- have visited versus not visited 15 per cent
- enjoy arts and culture versus do not enjoy nine per cent
- have studied versus not studied 26 per cent
- have done business/trade versus have not done business/trade 22 per cent.

There is a complex interplay between hard and soft power. By charting the relationships between three metrics (is a force for good; has become more or less important than five years ago; and is a global power), we find there is an apparent tension between being seen as a great power in the traditional hard sense of being a leading military power and being perceived as a positive force in the world. The USA, China and, to a lesser extent, Russia are seen as being more powerful and important than the UK, but the UK, alongside Japan and Germany, is perceived as less threatening or, indeed, a benevolent power, which enhances its soft power.

The countries recording results close to the UK's for trust and attractiveness share similar values and profiles but, unlike the UK, they are also investing heavily in soft power initiatives such as foreign language broadcasting and cultural relations. Unlike the British Council the network of Germany's Goethe Institute has been growing: between 2013 and 2018 the number of offices grew from 159 to 169, whereas that of the British Council contracted from 196 to 177.<sup>2</sup> Through a new partnership with the Institut Français, the Goethe is committed to further expansion, with new offices set to open in Erbil, Bishkek, Rio de Janeiro and Palermo. This matters. Cultural institutions are influential for attracting international students, tourists and FDI.

2. British Council (2018) *Soft power superpowers*. Available online at: [https://www.britishcouncil.org/sites/default/files/j119\\_thought\\_leadership\\_global\\_trends\\_in\\_soft\\_power\\_web.pdf](https://www.britishcouncil.org/sites/default/files/j119_thought_leadership_global_trends_in_soft_power_web.pdf)

For example, academics at the University of Edinburgh<sup>3</sup> have found that a one per cent increase in the number of countries a cultural institution from country X covers is associated with, on average, a 0.66 per cent increase in FDI and a 0.73 per cent increase in international students for that country. Complacency is a real threat to the UK's position. It could easily be overtaken by countries like Germany and Japan and miss out economically and in influence if it fails to match its rivals' commitment to and investment in its international networks.

The fact that soft power can be lost means UK policymakers must be alive to the challenges posed by both current events and long-term, structural challenges, of which Brexit is the most obvious. The UK is first among equals, but small shifts in opinion could very easily change the rankings, while a more significant change in attitudes could see the UK's position move closer to that of the USA. The UK must continue to be perceived as outward looking, open and optimistic. Other states have been willing to give credence to the UK's point of view because it is recognised as a leading proponent of the rules-based international system. If the UK steps back from that stance it will lose influence and become less attractive and deserving of the trust of others. That would have very real costs. Being first among equals has served the UK very well, but if it is to maintain its leading position in the years ahead, the UK needs to embrace an ambitious vision and strategy for British soft power, a continued commitment to multilateral co-operation and international development, and a renewed investment in its international networks.

**The UK is first among equals, but small shifts in opinion could easily change the rankings ...**

3. JP Singh and Stuart MacDonald (2017) *Soft Power Today: Measuring the Influences and Effects*. University of Edinburgh. Available online at: [https://www.britishcouncil.org/sites/default/files/3418\\_bc\\_edinburgh\\_university\\_soft\\_power\\_report\\_03b.pdf](https://www.britishcouncil.org/sites/default/files/3418_bc_edinburgh_university_soft_power_report_03b.pdf)

# Introduction

We are in the era of Donald Trump, Brexit and identity politics where perceptions, however partial or unfair, are king. In the past much of the emphasis in international relations has been squarely on hard power, who won the war and ‘it’s the economy, stupid’, but being liked and trusted has always been important to a country’s international status and capability. That is only more true today. Trust is essential to the conduct of trade and diplomacy; only if the parties to any kind of non-aggressive exchange trust one another can a deal be done. If the parties do not trust their counterparts are being honest and will fulfil their side’s obligations, they will require guarantees, insurance, additional bureaucracy and other costs. The value in being liked is immeasurable, but it is possible to identify individual indicators that offer some insight; for example, the international appeal of *Harry Potter* has been estimated to be worth about £4 billion to London alone.<sup>4</sup> Popularity and attractiveness have substantial financial dividends. Inward investment stock into the UK by the end of 2018 was worth \$1.89 trillion (£1.48 trillion), more than Germany (\$939 billion) and France (\$825 billion) combined.<sup>5</sup> Why? Because the UK is such an attractive place to do business. Familiarity is a key factor in attractiveness. Business decisions about investing in and trading with the UK are in part down to how well known the UK is internationally, but such decisions favour the UK over its competitors because it is known to be a place where you can do business, where the rule of law is respected, and which has a society that is open, free and fair. It is generally seen as stable and predictable, though Brexit has challenged that view.

The British Council has long collected the views of young people to better understand the interests and aspirations of the next generation, how they perceive other countries and how the UK can support them to realise their ambitions. The biennial survey of the G20 group of nations is one such mechanism. It offers insight into how attitudes shift and change over time.

The series allows for the long-term tracking of how each state in the G20 ranks in terms of their attractiveness and trustworthiness in the eyes of respondents. In considering the results it is always worth recalling that the focus is on the perceptions of young people. Their attitudes matter because they are the future, but they are nevertheless perceptions, mostly non-expert, and not statements of fact.

The headline findings of the 2018 edition were published in *Powers of attraction*.<sup>6</sup> The analysis of the 2018 dataset presented in this report probes deeper into young people’s perceptions to better understand the factors that most affect attractiveness and trust. Seven G20 states – China, Germany, India, Japan, Russia, the UK and the USA – were selected for a ‘deep dive’ to allow for the analysis of the different drivers of attractiveness and trust. The selection of states included both permanent members (P5) of the United Nations Security Council and the biggest economies by nominal gross domestic product (GDP). France was excluded from the study for being too similar in global profile to the UK, Germany and Japan.

Part one of this report presents the data and analysis undertaken by GfK Social and Strategic Research (now part of Ipsos MORI). This is followed by a more in-depth exploration of the findings that sets out to explain the implications and, where appropriate, make recommendations specific to UK policymakers to ensure the UK continues to enjoy the benefits of being a ‘soft power superpower’. This research should be seen in the context of other recent British Council reports, most particularly *The value of trust*,<sup>7</sup> *Powers of attraction*<sup>8</sup> and *Soft power superpowers*,<sup>9</sup> as well as academic papers like *Soft Power Today: Measuring the Influences and Effects*<sup>10</sup> and *Running Out of Credit?*<sup>11</sup> The British Council’s insight programme exists to inform the organisation’s own strategy and global operations but also to share that international expertise with policymakers and practitioners working in the soft power space both in the UK and around the world.

4. Josie Cox (2017) Harry Potter is the UK’s most successful businessman – and JK Rowling Knows It. *The Independent*. Available online at: <https://www.independent.co.uk/voices/harry-potter-reveal-j-k-rowling-british-economy-most-successful-businessman-a7808841.html>

5. HM Government press release (2019) UK holds more foreign investment than Germany and France combined. Available online at: <https://www.gov.uk/government/news/uk-holds-more-foreign-investment-than-germany-and-france-combined>

6. British Council (2018) *Powers of attraction*. Available online at: [https://www.britishcouncil.org/sites/default/files/j136\\_thought\\_leadership\\_g20\\_perceptions\\_196x284mm\\_final\\_web\\_v3.pdf](https://www.britishcouncil.org/sites/default/files/j136_thought_leadership_g20_perceptions_196x284mm_final_web_v3.pdf)

7. *The value of trust* (n 1).

8. *Powers of attraction* (n 6).

9. *Soft power superpowers* (n 2).

10. Singh and MacDonald (n 3).

11. British Foreign Policy Group (2019) *Running Out of Credit? The Decline of the Foreign Office and the Case for Sustained Funding*. Available online at: <https://bfpgrp.co.uk/wp-content/uploads/2019/06/Running-out-of-Credit-HR.pdf>

# Perceptions of great nations and the factors that shape them

The first step in understanding how young people perceive and rate the seven focus countries in terms of their trust and attractiveness is to simply ask them. Figures 1–4 on pages 8–9 present the results for overall attractiveness and trust in people, government and institutions, averaged across the G20 from the 2018 survey. The UK records the highest scores of the seven focus countries across all four metrics (overall attractiveness (81 per cent) and trust in: people (67 per cent), government (56 per cent) and institutions (64 per cent)), followed closely by Germany (79 per cent, 65 per cent, 56 per cent and 63 per cent) and Japan (78 per cent, 66 per cent, 54 per cent and 60 per cent), then the USA (73 per cent, 53 per cent, 36 per cent and 49 per cent), China (57 per cent, 40 per cent, 32 per cent and 36 per cent), Russia (56 per cent, 38 per cent, 34 per cent and 39 per cent) and finally India (51 per cent, 36 per cent, 28 per cent and 28 per cent).

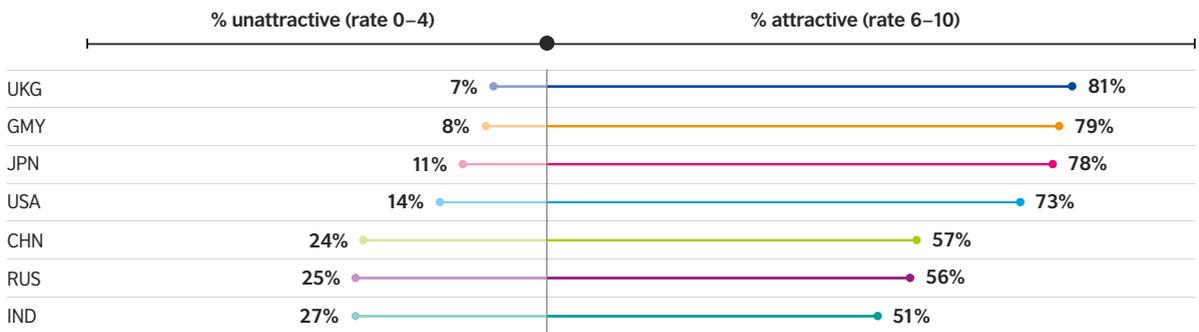
This is a very positive set of results for the UK, but it should be noted that when we take the whole of the G20 into account, it is Canada (84 per cent, 73 per cent, 64 per cent and 68 per cent) that excels across all of these metrics,<sup>12</sup> with the UK coming fourth for overall attractiveness, third for trust in government and second for trust in people and institutions. That is still a very solid position. However, the second point to note is the closeness of the scores of the UK, Germany and Japan; the gap between the UK and these two countries is narrower than the one between the UK and Canada. It is reasonable to assert that it is more likely that one or even both will overtake the UK in future than it is that the UK will close the gap on Canada.

These perceptions matter. Perceptions influence behaviours, behaviours influence reality. They interact in subtle but consequential ways that affect a state's ability to attract international business/trade, students and tourists.

**Perceptions influence behaviours, behaviours influence reality. They interact in subtle but consequential ways that affect a state's ability to attract international business/trade, students and tourists.**

12. *Powers of attraction* (n 6).

**Figure 1: Scores for overall attractiveness**



**Figure 2: Scores for trust in people**



\* See Appendix, pp. 48-49, for full details of the data, base and survey questions.

**Key:**

- UKG – United Kingdom
- GMY – Germany
- JPN – Japan
- USA – United States of America
- CHN – China
- RUS – Russia
- IND – India

Figure 3: Scores for trust in government

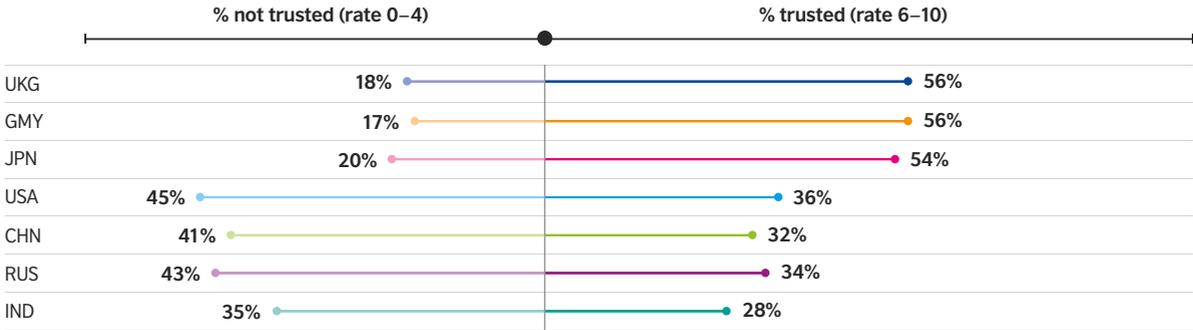
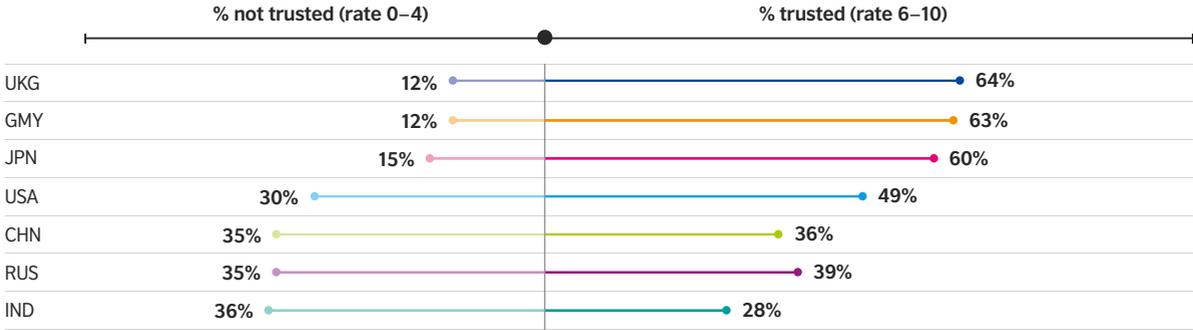


Figure 4: Scores for trust in institutions



## What drives attractiveness and trust?

Having established the overall picture for trust and attractiveness, the next step in the analysis was to examine just what it is that young people across the G20 find attractive about the UK and the other focus countries. We asked survey respondents 'which, if any, of the following characteristics particularly contribute to making a country attractive to you?'. The results for the seven focus countries are shown in Table 1 below. The list of factors was originally developed in consultation with Ipsos MORI back in 2014 for a study published in *As others see us*.<sup>13</sup>

The 2018 analysis presents some interesting findings. There are commonalities in what respondents find attractive. Cultural and historic attractions is the highest ranked factor for five of the seven countries, namely China, Germany, India, Russia and the UK, and is second for Japan. Cities is also prominent, being the top most attraction for the USA and second highest for Germany, Russia and the UK. Technology and infrastructure also present as important factors, being the top most factor for Japan and Germany and second for China and the USA. There are also commonalities across the factors that are generally seen as less important to a country's attractiveness, with the weather, the current and past actions of government, and sporting teams and events all presenting in the bottom three for four or more countries.

**Table 1:** The characteristics that make a country attractive

	UKG	GMY	JPN	USA	CHN	RUS	IND
Its economy and business environment	32%	42%	39%	47%	42%	27%	17%
Its technology and infrastructure	30%	45%	62%	51%	45%	27%	12%
Its brands, products and services	28%	36%	43%	48%	35%	14%	12%
Its social and political institutions (e.g. media, laws, justice system, civil service, health service, system of government)	29%	33%	25%	28%	20%	25%	14%
Its people (e.g. their attitudes and behaviours)	39%	39%	55%	32%	36%	35%	45%
Its education system and institutions	37%	38%	35%	35%	22%	21%	11%
Its science, research and ability to innovate	25%	41%	50%	41%	38%	27%	14%
Its sporting teams, events and achievements	23%	24%	10%	26%	9%	17%	10%
Its cultural and historic attractions	54%	45%	60%	33%	53%	43%	60%
Its arts (e.g. music, theatre, literature, visual arts, film)	46%	33%	54%	37%	39%	36%	49%
Its language	44%	28%	36%	41%	28%	31%	26%
Its cities	53%	44%	52%	57%	37%	41%	37%
Its countryside and landscape	41%	33%	44%	29%	32%	33%	45%
The current and past actions of its government	16%	20%	13%	14%	16%	23%	11%
Its weather	21%	19%	22%	24%	13%	26%	27%
Its reputation for being safe and secure	31%	36%	41%	19%	20%	22%	10%
Its history	44%	38%	46%	23%	45%	40%	48%
Something else	2%	3%	4%	3%	3%	4%	4%
None of these	0	0	0	0	0	1%	1%

\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

What we also see in the data are some significant differences. Some countries seem to excel in a limited number of categories. The scores for India for cultural attractions (60 per cent), arts (49 per cent) and history (48 per cent) are well ahead of factors like sport (ten per cent), security (ten per cent) and government (11 per cent). Others, perhaps most notably the UK, present a more rounded profile, with no one factor really standing out. On those same factors the scores for the UK are 54 per cent, 46 per cent, 44 per cent, 23 per cent, 31 per cent and 16 per cent. What is clear from the results is that cultural factors – specifically cultural and historic attractions, the arts, a country's history and its cities – are especially important to a country's attractiveness. The UK presents strongly across all these categories. However, for the other standout factor, technology and infrastructure, the UK lags significantly behind Germany, the USA, China and Japan, which all have this as a top three factor. For the UK this factor comes in at 11th place out of the 17 named factors.

Looking to move beyond considerations of what makes a country attractive to what contributes to trust, we presented survey respondents with a set of 20 'qualities statements'. The full list of statements is provided in the glossary. This suite of metrics was first developed for the 2016 edition of the survey, but for the 2018 survey two new categories were added to the list of qualities: '... is a force for good in the world' and '... is at the cutting edge of science and technology'. The data from 2016 was at the core of the analysis published in 2018's *The value of trust* report.<sup>14</sup> The mean results for the seven focus countries, averaged across the G20 samples, are given in Figure 5 on page 12.

These qualities have a significant impact on overall attractiveness and trust. The aptly titled *The value of trust*<sup>15</sup> report identified the qualities that most strongly drive trust as:

- openness
- contribution to aiding development in poorer countries
- a free justice system
- world-leading arts and culture
- working constructively with other governments
- treating people fairly.

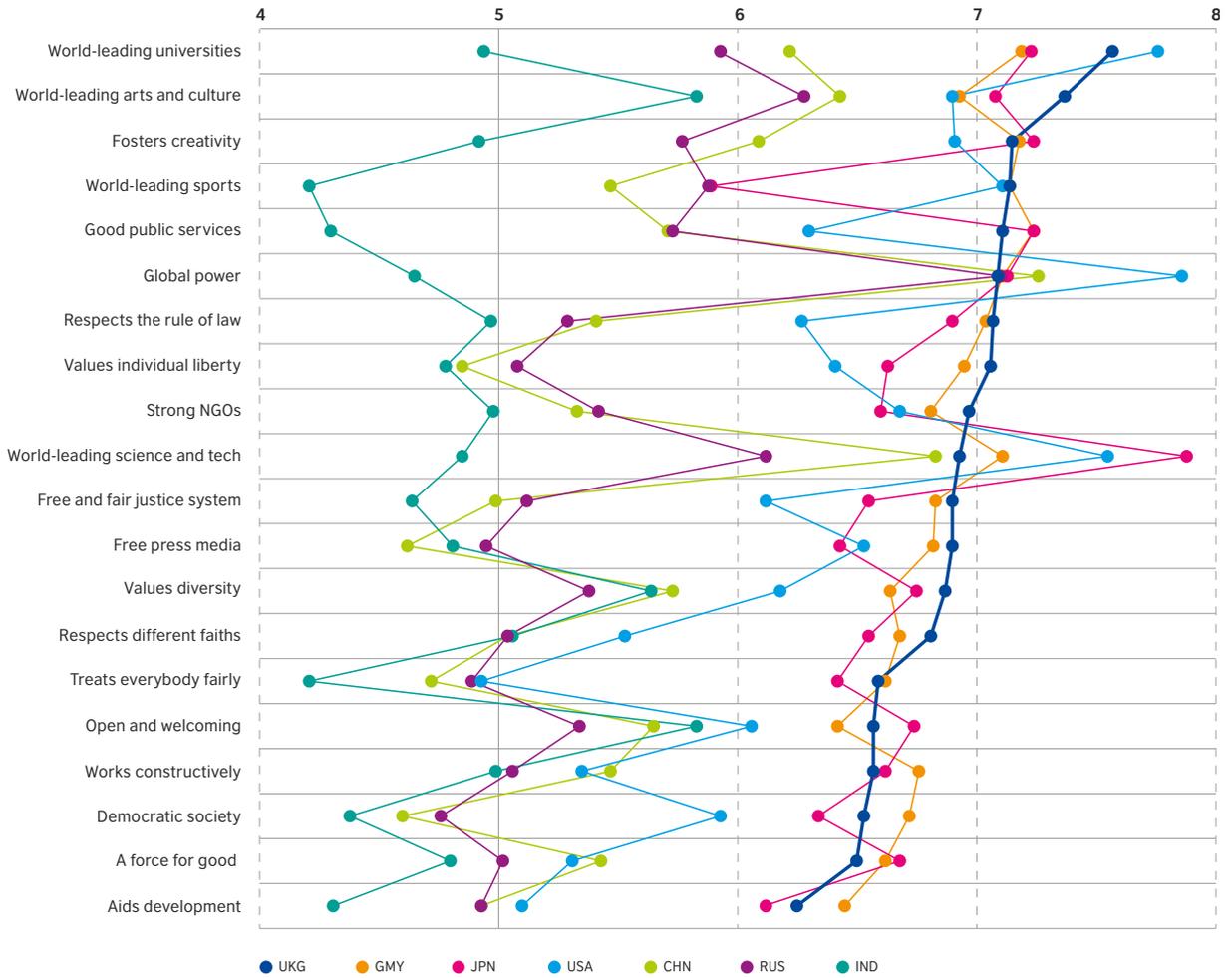
That analysis, undertaken for the British Council by Ipsos MORI and In2Impact, found that openness was the single strongest driver of trust in people, followed by contribution to development and a free justice system, while for trust in government, a state's contribution to development was the most prominent driver, followed by works constructively with other governments and open and welcoming. The analysis also highlighted the tangible value of trust to a state, finding that people who trusted the UK were roughly twice as likely to want to engage with the UK in future. Furthermore, it found that 15 per cent of people who said they trusted the UK said they intended to do business or trade with the UK, compared to only eight per cent who said they distrusted the UK. It also found that 21 per cent of people who said they trusted the UK said they intended to study in the UK, compared to 12 per cent who said they distrust the UK.

In comparison to the other focus countries the UK is generally well evaluated across all the qualities. Indeed, the pattern that emerges very much reflects that of the results for the questions on overall attractiveness and the three trust metrics. Across the board Germany, Japan and the UK track closely together, with the UK coming first for nine of the 20 qualities, second for five and third for four, making the UK the overall leader. Only for is a global power (where it came sixth) and is at the cutting edge of science and technology (fourth) is the UK not in the top three. Where the UK, Japan and Germany dominate for most of the qualities, the USA comes top only for two: is a global power (averaging 7.9 on a scale of 0–10 versus the UK's 7.1) and has world-leading universities (7.8 versus the UK's 7.6) to average fourth place overall. China and Russia are some way behind the USA, though China came second for is a global power (7.3) and averages fifth place overall, ahead of Russia. India averaged seventh place across the metrics, a set of findings we will consider in more detail below. The results confirm that the UK is, or more accurately was, as of Easter 2018 when the survey was undertaken, the world's foremost soft power out of the seven focus countries. Germany and Japan are the UK's two strongest competitors, followed by the USA, China, Russia and, finally, India.

14. *The value of trust* (n 1).

15. *Ibid.*

**Figure 5:** How countries are perceived across the 20 qualities statements



\* See Appendix, pp. 48-49, for full details of the data, base and survey questions.

The UK leads on arts and cultural institutions/ attractions, which have already been found to be a crucial driver of attractiveness, but what stands out more from the results is the UK's leading position on societal factors. It is top for diversity, the rule of law, liberty, institutions and judicial and press freedoms, and second (behind Germany) for is a strong example of a democratic society and government contributes its fair share to aiding development. The last is an interesting one as the UK is the only country out of the seven to consistently meet the UN's target for spending 0.7 per cent of gross national income (GNI) on overseas development assistance, having done so every year since 2013.<sup>16</sup> Germany, by contrast, has only once come close to hitting the target, coming within a hair's breadth of the 0.7 per cent target in 2015. However, in 2013 it only contributed 0.3 per cent and only once so far this century has it surpassed the UK's commitment – when the UK contribution as a proportion of GNI reached a nadir of 0.36 per cent in 2007, Germany scored 0.37 per cent. While there have been a couple of years where Germany has spent slightly more than the UK on overseas aid in cash terms, it has never matched the UK's *per capita* contributions. The USA came in fourth on this metric despite being the largest contributor in cash terms, but then its contribution is less than 0.2 per cent of GNI (and falling).

The importance of these societal factors lies in their connection to a country's values. Whether it's the BBC, *The Economist* or the *Daily Mail's* 'sidebar of shame', the UK is known as a country that promotes a vibrant free press. Its legal system and institutional model has been globally influential. Many Commonwealth countries hold both to the principle of the presumption of innocence as well as the wigs and other fripperies of UK courts, while Canada has its own House of Commons. Freedom and fairness; respect for difference; robust, open and accountable institutions, these are expressions of the values of the people of the UK. The British are still seen as happy to queue, to play fair and to follow the rules, after all 'it's just not cricket' to do otherwise. These values are shared with the peoples of Germany and Japan and other liberal, democratic states, even though there are differences in their form and expression. What is often forgotten in discussions about foreign affairs is how important these values are, especially to those who

live in societies that are not free, where people's political and civil rights are curtailed, where they can be incarcerated for a joke, a by-line or just loving the 'wrong' person.

For the five qualities that *The value of trust*<sup>17</sup> identified as most strongly driving trust, the UK comes first for a free justice system (averaging 6.9 on a scale of 0–10) and for world-leading arts and culture (7.4); second, to Japan, for openness (6.6 versus 6.8); second to Germany for contribution to development (6.3 versus 6.5) and treats everybody fairly (6.6 versus 6.7); and third, behind both Germany and Japan, for works constructively with other governments (6.6 versus 6.8 and 6.7 respectively).

Again, the UK can be seen as being slightly ahead of its closest competitors overall. However, it is that very tight clustering of the findings for the UK, Germany and Japan that is the more significant finding. Any one of these three countries could easily be on top as all are seen as exhibiting the individual qualities of openness, fairness and generosity that are at the core of a state's trustworthiness. That it is these five qualities that are most important to a country's trustworthiness should not come as a surprise. In our everyday lives our closest, most trusted friends are the ones who are positive, sharing, supportive and kind.

The presence of arts and culture alongside freedom and fairness as the most important determinants for trust might seem incongruous, but again seen through the prism of personal experience, it can be seen as the equivalent in one's own life of an individual friend's wit, charm and ability to entertain. After all, the most dependable dullard is still hard work.

However, there is a deeper, more meaningful set of truths here as well. Culture provides a platform for engaging, sharing and understanding, it provides a safe space to convene, where trust can be built even in the face of geopolitical conflict. Critically, it is an expression of a people's values. Art and culture exist in both free and unfree societies, but it is in liberal, open countries, where it is the state's censors rather than the artists and provocateurs that are kept on a leash, that people are free to truly explore, innovate and challenge, to bring forth new thinking and fresh perspectives.

16. OECD data (viewed 30 October 2019) Net ODA. Available online at: <https://data.oecd.org/oda/net-oda.htm>

17. *The value of trust* (n 1).

Figure 6, right, presents the findings of a key enhancement analysis of the qualities data. The analysis found that having world-leading universities (11 per cent), being at the cutting edge of technology (nine per cent) and having an educational system that fosters creativity and innovation (eight per cent) are the most important drivers of overall attractiveness, but that they are only slightly ahead of good public services and world-leading sports teams and events (seven per cent).

However, there are significant differences when one looks at intentions to do business/trade. While being seen as a global power has no relative impact on overall attractiveness (zero per cent), it is a key driver of finding a country attractive for doing business/trade (18 per cent), along with perceptions of science and technology (18 per cent) and world-leading universities (12 per cent). These three qualities are significantly ahead of all the other qualities. It should be noted that survey respondents' perceptions of 'global power' will at least in part be driven by perceptions of economic hard power, so it should not be at all surprising to find it emerge as a key driver of attractiveness as a place to do business/trade.

The UK generally performs well on the socio-cultural qualities that drive trust and overall attractiveness, but as we have seen above lags behind on is a world power and world-leading science and technology. Regardless of whether this perceived gap is based on reality or not, this ought to concern policymakers as it presents a potential weakness in the UK's international appeal. If competitor countries, e.g. Germany and Japan, pull further ahead of the UK on these metrics, that may undermine the UK's comparative advantage in the years ahead, with implications for FDI and trade and the UK's international influence. We will consider this and other aspects of the analysis below.

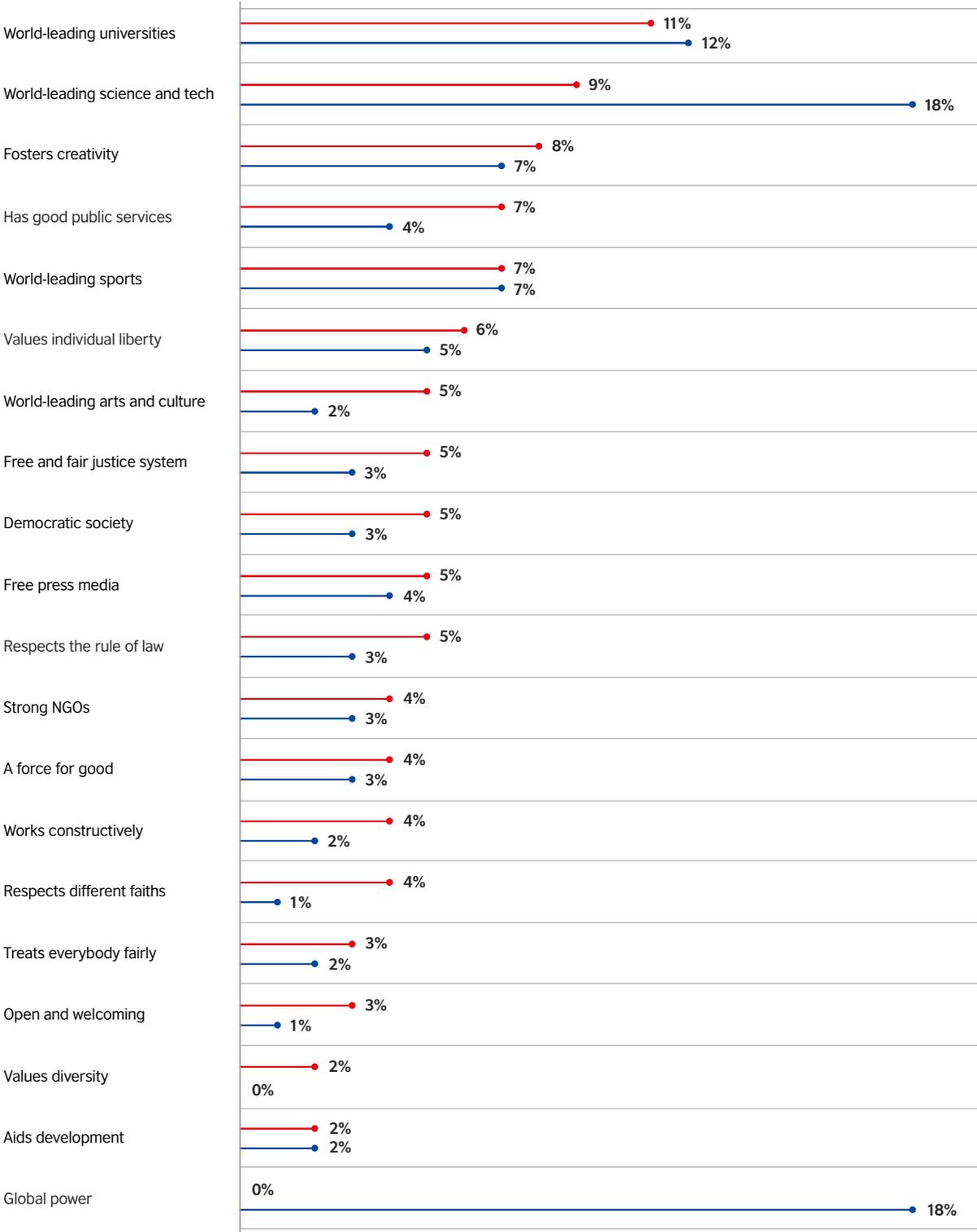
### How do perceptions drive international engagement?

Seeking to build on the analysis published in *The value of trust* and to better understand how trust and attractiveness drives interactions, the British Council commissioned GfK Social and Strategic Research to analyse how past interactions with a country shape perceptions of soft power and how both these perceptions and past interactions affect future intentions to interact with a country. It also sought to evaluate a country's soft power qualities to assess to what extent current evaluations of soft power drive attractiveness.

Unsurprisingly, the data makes clear that experience matters. Looking at averages across all the soft power measures tested, perceptions are more positive among people who have interacted with a country than they are with their counterparts who have not. This pattern is the same across all seven comparator countries (Figure 7 on page 16). It must be acknowledged that to have previously chosen to interact with a country, participants must have been attracted to it already, before that interaction took place, and therefore have potentially looked more positively towards it than the national mean anyway. Nevertheless, the differences in perceptions also reflect the significant impact of real lived experience. This is most strongly demonstrated by the results for Russia and India. Young people in G20 countries are least likely to have interacted with either country, yet the results show that they benefit the most from past interactions, i.e. the impact of actual experience upon perceptions is particularly pronounced. This reveals the importance of familiarity to perceptions. It may also indicate that preconceptions of both Russia and India were less positive than those for more familiar places like the UK and USA.

**While being seen as a global power has no impact on overall attractiveness, it is a key driver of finding a country attractive for doing business/trade.**

**Figure 6:** How perceptions of a country’s qualities drive overall attractiveness and attractiveness as a place to do business/trade

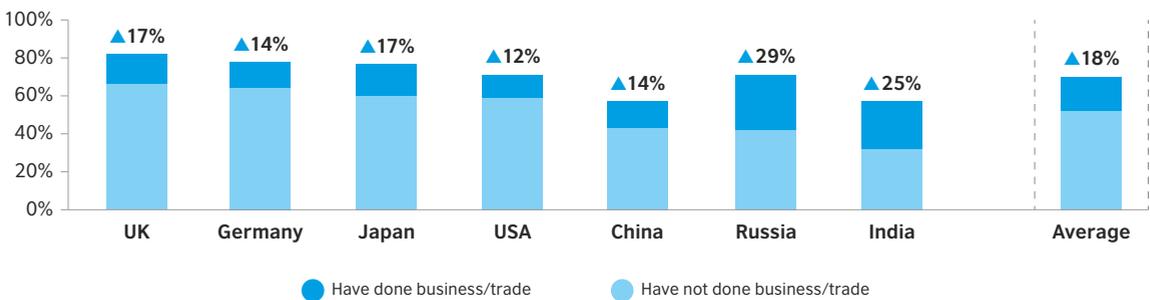
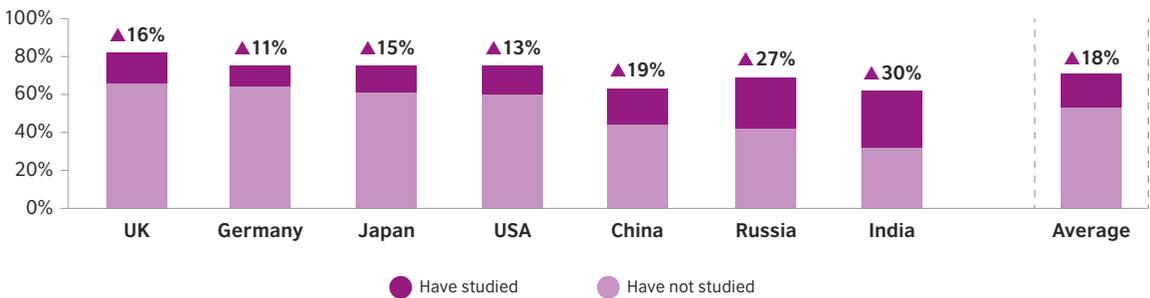
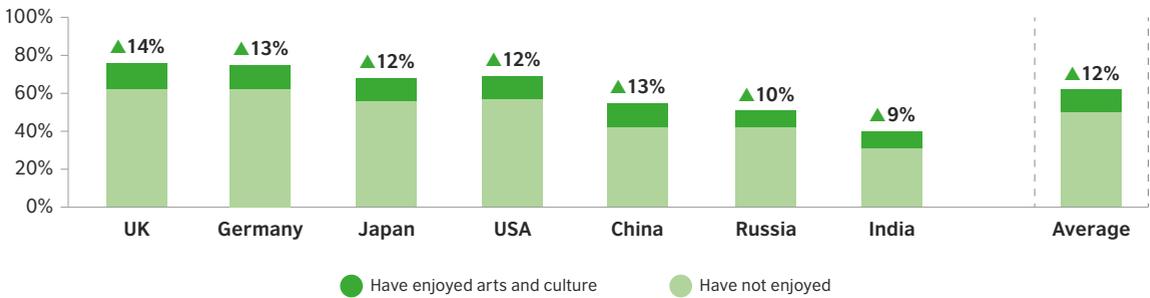
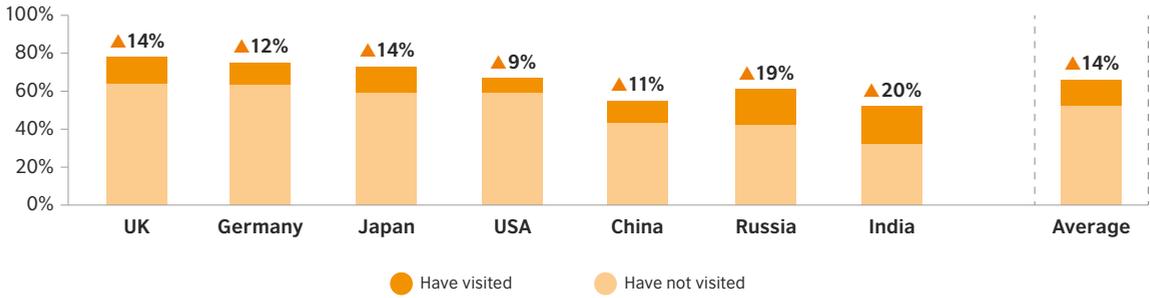


**Key:** ● Overall attractiveness    ● Attractiveness as a place to do business/trade

\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

**Figure 7:** How different experiences and exposure to other countries affect people’s perceptions

% positive evaluation (6–10) of the seven comparator countries: average across the 20 qualities statements



Average uplift across all qualities:



\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

Looking at the detailed data, Russia receives an average uplift of 19 per cent across all the qualities from people who have visited Russia; ten per cent from people who enjoy its arts and culture; 27 per cent from those who have studied there; and 29 per cent from those who have done business/trade in Russia. The uplifts for India are 20 per cent from people who visited; nine per cent from people who enjoy its arts and culture; 30 per cent from those who have studied there; and 25 per cent from those who have done business/trade in India. In comparison with Russia and India, the impact of past interactions for the UK is lower: the UK receives an average uplift across the qualities of 14 per cent among both people who visited and those who enjoy its arts and culture; 16 per cent from those who studied there; and 17 per cent from those who have done business/trade in the UK.

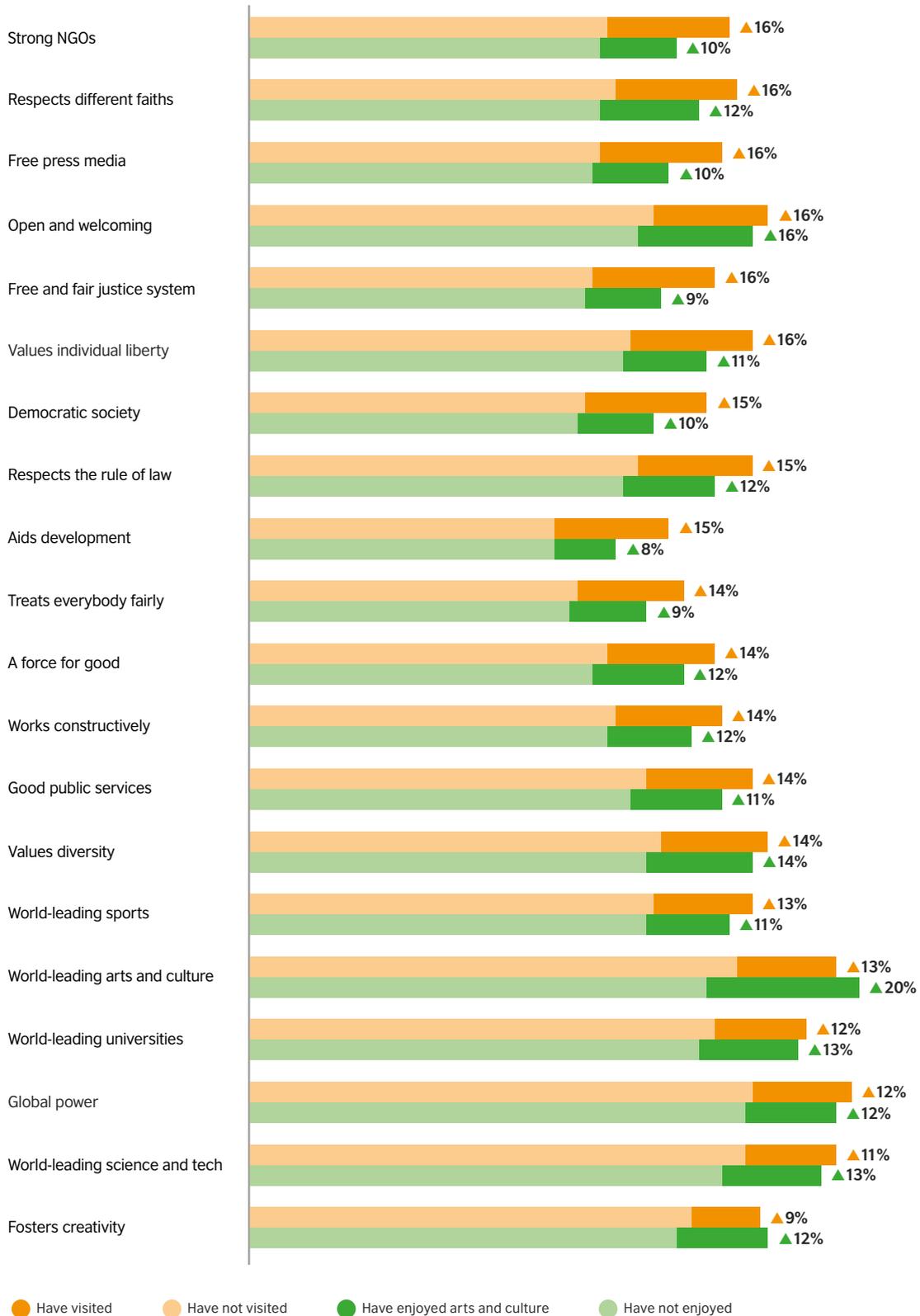
Looking at the relationship between different forms of engagement and the individual qualities highlights some interesting results in terms of uplifts. Figures 8 and 9 (see pages 18–19) show these uplifts averaged across the seven focus countries. Further detail can be seen in Table 2 on page 20, which gives the uplifts for each country individually for each one of the qualities. For example, having visited the UK and enjoying British art and culture are both associated with more positive evaluations of the UK almost equally across all measures (the uplift varying from nine per cent to 18 per cent and averaging 13.5 per cent). Interestingly, having studied and done business with the UK results in a pronounced increase (26 per cent and 22 per cent respectively) in positive perceptions of the UK's contribution to international development, the most potent driver of trust in government. In contrast, having studied in the UK results in a more modest nine per cent increase in positive perceptions of its universities and academic research over those that have not had that experience. That may seem counterintuitive but can be accounted for through the generally high reputation of the UK's higher education and research sector internationally, i.e. the uplift is lower because perceptions were already very positive. The findings instead suggest that for many the lived experience of studying in the UK was as expected, that pre-existing positive perceptions of the UK universities sector were borne out by the real-world experience of life on a UK campus.

These findings reinforce the importance of familiarity to a state's soft power. The uplifts represent an important and useful indicator of the value of international engagement. For places with lower levels of international awareness – e.g. Russia and India but also parts of the UK such as Wales and the North that attract significantly fewer tourists and international students than London and the south-east of England – increasing familiarity is that much more impactful. The largest uplifts are among those who have studied and/or done business/trade in a country. It is blindingly obvious but still worth reinforcing that the immersive experience of everyday living in a country has a more profound impact on perceptions than the more common experiences of cultural engagement and tourism. Programmes like international scholarship schemes and opportunities for researchers, artists and entrepreneurs to work in a country are therefore especially important to building positive perceptions and favourability towards a country. And not only for the individuals themselves but for their family and peer group with whom they share their experiences and recommendations. One of the most impactful approaches states looking to build their soft power can take is to operate a visa regime that actively encourages people to spend time in a country studying or working on a time-limited basis. Doing so is vital to building a country's international attractiveness, connectedness and trustworthiness.

**One of the most impactful approaches states looking to build their soft power can take is to operate a visa regime that actively encourages people to spend time in a country.**

**Figure 8:** The impact of previous experience through tourism and consumption of arts and culture on perceptions of the 20 qualities statements

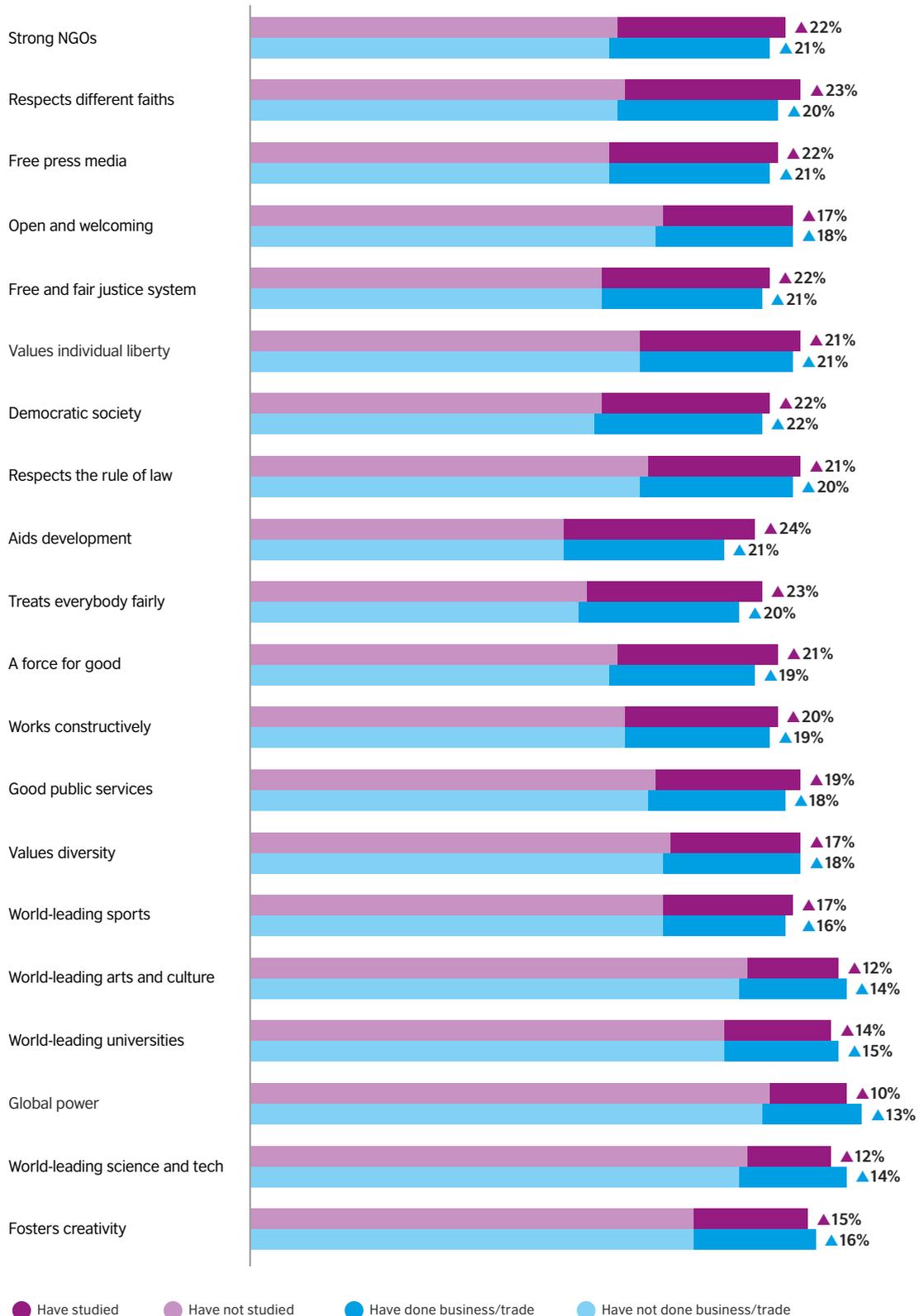
% positive evaluation (6–10): average of seven comparator countries



\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

**Figure 9:** The impact of previous experience through study and business/trade on perceptions of the 20 qualities statements

% positive evaluation (6–10): average of seven comparator countries



**Table 2:** The impact of previous experience on perceptions of the 20 qualities statements, percentage uplift by country

	UKG		USA		GMY	
Strong NGOs	▲ 13%	▲ 14%	▲ 12%	▲ 15%	▲ 9%	▲ 10%
	▲ 15%	▲ 17%	▲ 14%	▲ 15%	▲ 12%	▲ 17%
Respects different faiths	▲ 17%	▲ 17%	▲ 8%	▲ 11%	▲ 16%	▲ 13%
	▲ 20%	▲ 17%	▲ 16%	▲ 13%	▲ 16%	▲ 17%
Free press media	▲ 17%	▲ 13%	▲ 9%	▲ 13%	▲ 13%	▲ 13%
	▲ 17%	▲ 19%	▲ 13%	▲ 12%	▲ 15%	▲ 18%
Open and welcoming	▲ 16%	▲ 13%	▲ 11%	▲ 16%	▲ 13%	▲ 14%
	▲ 16%	▲ 18%	▲ 15%	▲ 11%	▲ 11%	▲ 15%
Free and fair justice system	▲ 15%	▲ 14%	▲ 10%	▲ 10%	▲ 13%	▲ 12%
	▲ 17%	▲ 17%	▲ 16%	▲ 14%	▲ 13%	▲ 17%
Values individual liberty	▲ 15%	▲ 15%	▲ 11%	▲ 14%	▲ 13%	▲ 13%
	▲ 14%	▲ 15%	▲ 15%	▲ 12%	▲ 13%	▲ 15%
Democratic society	▲ 15%	▲ 11%	▲ 11%	▲ 14%	▲ 14%	▲ 13%
	▲ 19%	▲ 21%	▲ 14%	▲ 14%	▲ 13%	▲ 17%
Respects the rule of law	▲ 15%	▲ 14%	▲ 11%	▲ 13%	▲ 13%	▲ 13%
	▲ 17%	▲ 17%	▲ 17%	▲ 14%	▲ 13%	▲ 14%
Aids development	▲ 15%	▲ 9%	▲ 12%	▲ 9%	▲ 10%	▲ 10%
	▲ 26%	▲ 22%	▲ 19%	▲ 17%	▲ 14%	▲ 15%
Treats everybody fairly	▲ 15%	▲ 14%	▲ 9%	▲ 7%	▲ 11%	▲ 12%
	▲ 19%	▲ 18%	▲ 21%	▲ 17%	▲ 13%	▲ 16%
A force for good	▲ 18%	▲ 13%	▲ 11%	▲ 11%	▲ 13%	▲ 13%
	▲ 19%	▲ 21%	▲ 16%	▲ 14%	▲ 14%	▲ 16%
Works constructively	▲ 13%	▲ 14%	▲ 8%	▲ 11%	▲ 13%	▲ 13%
	▲ 18%	▲ 19%	▲ 17%	▲ 16%	▲ 11%	▲ 14%
Good public services	▲ 12%	▲ 15%	▲ 5%	▲ 10%	▲ 12%	▲ 12%
	▲ 16%	▲ 15%	▲ 16%	▲ 14%	▲ 7%	▲ 15%
Values diversity	▲ 14%	▲ 16%	▲ 7%	▲ 14%	▲ 14%	▲ 14%
	▲ 17%	▲ 17%	▲ 15%	▲ 11%	▲ 11%	▲ 16%
World-leading sports	▲ 12%	▲ 15%	▲ 11%	▲ 15%	▲ 9%	▲ 11%
	▲ 15%	▲ 15%	▲ 7%	▲ 7%	▲ 5%	▲ 11%
World-leading arts and culture	▲ 11%	▲ 18%	▲ 8%	▲ 18%	▲ 9%	▲ 17%
	▲ 8%	▲ 10%	▲ 7%	▲ 8%	▲ 7%	▲ 10%
World-leading universities	▲ 11%	▲ 16%	▲ 4%	▲ 12%	▲ 10%	▲ 13%
	▲ 9%	▲ 12%	▲ 4%	▲ 6%	▲ 8%	▲ 11%
Global power	▲ 12%	▲ 16%	▲ 7%	▲ 12%	▲ 11%	▲ 12%
	▲ 15%	▲ 15%	▲ 2%†	▲ 6%	▲ 7%	▲ 12%
World-leading science and tech	▲ 13%	▲ 14%	▲ 5%	▲ 13%	▲ 10%	▲ 12%
	▲ 15%	▲ 14%	▲ 4%	▲ 6%	▲ 9%	▲ 10%
Fosters creativity	▲ 10%	▲ 15%	▲ 3%	▲ 11%	▲ 9%	▲ 11%
	▲ 15%	▲ 15%	▲ 12%	▲ 10%	▲ 6%	▲ 11%

Key:

- ▲ Uplift (visited versus not visited)      ▲ Uplift (have enjoyed arts and culture versus have not enjoyed)  
▲ Uplift (studied versus not studied)      ▲ Uplift (done business/trade versus have not done)

† Not statistically significant.

\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

RUS		IND		CHN		JPN	
▲19%	▲7%	▲24%	▲8%	▲15%	▲11%	▲22%	▲8%
▲32%	▲30%	▲36%	▲26%	▲25%	▲16%	▲22%	▲23%
▲20%	▲9%	▲22%	▲11%	▲15%	▲12%	▲15%	▲13%
▲36%	▲37%	▲27%	▲25%	▲28%	▲15%	▲16%	▲19%
▲19%	▲8%	▲22%	▲6%	▲13%	▲7%	▲19%	▲10%
▲29%	▲33%	▲35%	▲31%	▲26%	▲13%	▲20%	▲21%
▲24%	▲11%	▲24%	▲21%	▲10%	▲19%	▲12%	▲15%
▲30%	▲31%	▲24%	▲25%	▲15%	▲13%	▲10%	▲11%
▲21%	▲8%	▲16%	▲3%	▲15%	▲9%	▲20%	▲8%
▲28%	▲33%	▲30%	▲25%	▲25%	▲16%	▲23%	▲24%
▲17%	▲6%	▲21%	▲7%	▲13%	▲9%	▲20%	▲13%
▲33%	▲38%	▲30%	▲28%	▲23%	▲14%	▲18%	▲22%
▲18%	▲6%	▲23%	▲7%	▲11%	▲8%	▲16%	▲10%
▲27%	▲35%	▲39%	▲29%	▲23%	▲15%	▲22%	▲20%
▲18%	▲8%	▲18%	▲7%	▲13%	▲13%	▲16%	▲15%
▲28%	▲31%	▲31%	▲27%	▲20%	▲16%	▲19%	▲21%
▲17%	▲7%	▲18%	▲2%	▲14%	▲11%	▲17%	▲6%
▲33%	▲33%	▲28%	▲24%	▲27%	▲15%	▲24%	▲22%
▲17%	▲6%	▲18%	▲5%	▲16%	▲11%	▲14%	▲10%
▲34%	▲32%	▲28%	▲24%	▲26%	▲14%	▲19%	▲20%
▲17%	▲9%	▲18%	▲11%	▲12%	▲14%	▲10%	▲15%
▲31%	▲27%	▲32%	▲26%	▲19%	▲17%	▲17%	▲14%
▲15%	▲8%	▲22%	▲8%	▲15%	▲15%	▲12%	▲13%
▲31%	▲31%	▲27%	▲20%	▲22%	▲18%	▲15%	▲17%
▲20%	▲9%	▲19%	▲3%	▲10%	▲14%	▲19%	▲15%
▲26%	▲28%	▲31%	▲20%	▲21%	▲15%	▲15%	▲16%
▲21%	▲10%	▲23%	▲20%	▲7%	▲15%	▲11%	▲10%
▲29%	▲32%	▲25%	▲22%	▲13%	▲14%	▲9%	▲14%
▲18%	▲12%	▲21%	▲6%	▲9%	▲11%	▲12%	▲6%
▲19%	▲20%	▲34%	▲29%	▲14%	▲12%	▲21%	▲21%
▲21%	▲21%	▲21%	▲21%	▲11%	▲23%	▲10%	▲20%
▲17%	▲19%	▲24%	▲25%	▲13%	▲9%	▲10%	▲14%
▲19%	▲13%	▲21%	▲8%	▲8%	▲15%	▲12%	▲15%
▲24%	▲23%	▲30%	▲26%	▲14%	▲13%	▲8%	▲14%
▲12%	▲14%	▲21%	▲9%	▲12%	▲12%	▲10%	▲12%
▲7%†	▲13%	▲30%	▲23%	▲6%	▲9%	▲3%†	▲10%
▲20%	▲14%	▲21%	▲7%	▲4%	▲16%	▲6%	▲13%
▲22%	▲25%	▲29%	▲23%	▲5%†	▲12%	▼1%	▲8%
▲21%	▲9%	▲14%	▲8%	▲3%†	▲16%	▲5%	▲13%
▲24%	▲26%	▲26%	▲25%	▲12%	▲13%	▲7%	▲10%

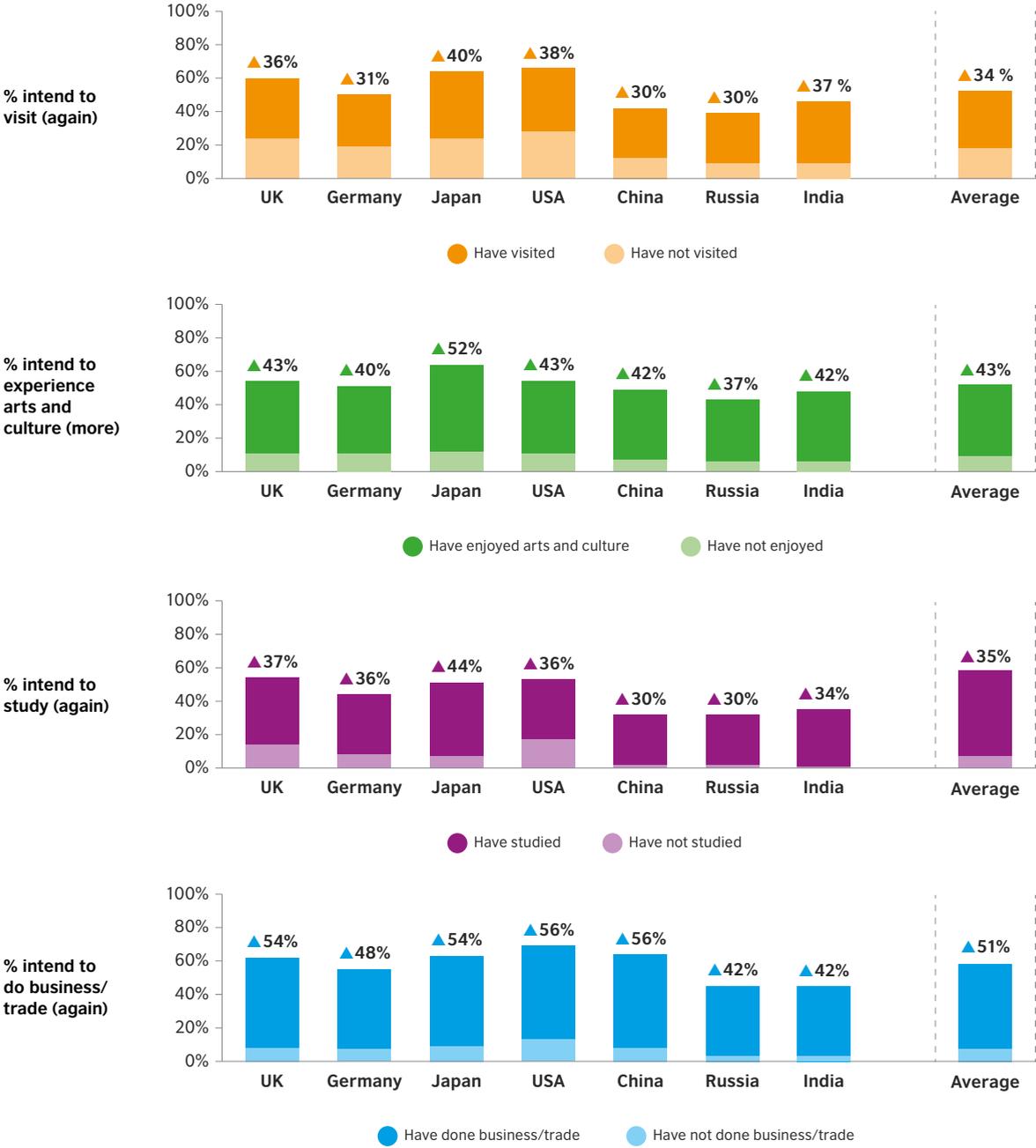
Another pattern that emerges is that some countries, especially the USA, Japan and the UK, see comparatively higher intentions for repeat interactions. Intentions to visit again are highest among those who have already visited the USA (66 per cent), Japan (64 per cent) and the UK (60 per cent) compared to the other focus countries (see Figure 10, right). All three countries also record relatively high levels of intention to visit among those who have not done so before: 28 per cent for the USA, 24 per cent for Japan and 24 per cent for the UK. Intentions to experience a country's arts and culture are highest among those who currently enjoy Japan's arts and culture (64 per cent). Intentions to study are higher among those who have already studied in the USA (53 per cent), the UK (51 per cent) and Japan (51 per cent). Intentions to do business/trade again are higher among young people who have already done business/trade with the USA (56 per cent), China (56 per cent), Japan (54 per cent) and the UK (54 per cent).

While intentions to interact with any of the seven comparator countries are consistently higher among those who have previous experience of the country, the data also highlights the opportunities to attract interest from those without prior experience. Intentions to visit the UK, USA and Japan are notably higher among those who have not visited the countries in the past compared to the other four focus countries (approximately a quarter intend to visit each country). Intentions to experience the arts and culture of the UK, USA, Germany and Japan are relatively high among young people who do not currently enjoy these countries' arts and culture (approximately one in ten for each country). Intentions to study in the UK and USA are significantly higher among those who have not studied there before (14 per cent and 17 per cent respectively), reflecting these countries' exceptional strength in higher education. Intentions to do business/trade are meanwhile higher among people who have never done business/trade with the USA (13 per cent) compared to other countries.

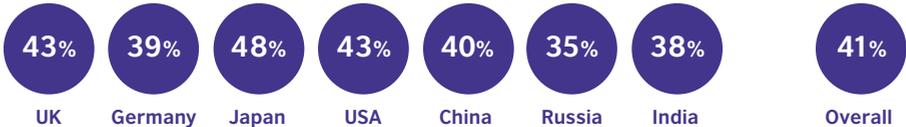
**Another pattern that emerges is that some countries, especially the USA, Japan and the UK, see comparatively higher intentions for repeat interactions.**

**Figure 10:** How previous experience of a country through tourism, cultural engagement, study and business/trade affects intention to engage in the future

% positive evaluation (6–10) of the seven comparator countries: average across the 20 qualities statements



Average uplift across all qualities:



\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

## What drives interactions?

Figure 11 on page 25 details the attractiveness of each of the focus countries as a place to study, do business/trade and visit, and as a source of arts and culture. Tables 3–6 on pages 26–27 map the relationships between the 20 qualities statements and intentions to study in, do business/trade with, visit and experience the arts and culture of the focus countries. While there are important differences between what drives young people to interact with each of the seven comparator countries across these four metrics, there are also commonalities. Intention to visit a country is generally driven by evaluations of the country's arts and cultural institutions; being a global power; universities/research; and sports teams and events. In addition, physical and cultural proximity are important – intentions to visit the UK are highest in other English-speaking G20 countries (Australia, Canada, South Africa) and those that are geographically close (Germany, Italy).<sup>18</sup>

Intentions to do business/trade with a country are generally driven by perceptions of a country's fairness, civil rights and whether it is welcoming to people. However, uniquely for the UK, the analysis identified having world-leading sports teams and events as the single most significant factor for those currently intending to do business/trade with the UK. This is a perhaps surprising finding, especially given the responses to the question covered above, 'which, if any, of the following characteristics particularly contribute to making a country attractive to you?', where sport ranked far behind other cultural factors. However, this highlights the subtle difference between the outcomes of straightforward questioning and an analysis that delves into the data to identify the patterns hidden behind. We will explore the role of sport in the UK's soft power in greater depth below.

Of the seven focus countries the UK ranks fourth (27 per cent) as an attractive place to do business/trade, behind the USA (56 per cent), China (37 per cent) and Japan (31 per cent). These are incidentally also the top four for the G20 group as a whole. What the data appears to confirm is that overall economic size is a critical factor in decisions about business/trade. It should not be surprising that the USA, China and Japan, the world's largest economies, trend ahead of the UK for intention to do business/trade. However, things get much more interesting where economies of similar overall size are in competition; the UK is ahead of Germany (24 per cent), France (13 per cent) and India (nine per cent)<sup>19</sup> in terms of business intention. There are a range of reasons for this – the openness of the UK economy compared to its competitors, the English language, the global significance of the City of London, the skills base, etc. – but the role of values should not be underestimated; we have already seen the importance of fairness and equality to the UK's international appeal. The UK's soft power gives it a vital edge over its close

economic rivals. Its culture, in both the narrow sense of the arts and, notably, its sporting culture but also in the wider sense described by thinkers like Raymond Williams, is essential to its attractiveness as a place to do business/trade. In looking to develop trade links with the wider world, UK policymakers should have due regard to the importance of culture to its success.

Intentions to study in a country are, unsurprisingly, driven by perceptions of its educational system and universities. Such decisions are primarily transactional – the countries with the most widely recognised and respected higher education institutions are the most attractive to young people looking to maximise their learning opportunities and career prospects. Young people in Indonesia, South Africa and India are most likely to say they intend to study in the UK, with the UK averaging second place – to the USA – for this metric among respondents across the G20. Along with the quality and prestige of an Ivy League or Oxbridge education, the English language, accessibility (both in terms of physical travel and the visa regime), cost factors (cost of living, cost of tuition, length of course) and post-study work opportunities all play a part in the relative attractiveness of the UK and USA for international students, but again values are an important factor. For the UK, for example, perceptions of its free and fair justice system are also important.

There is nothing surprising about the finding that artistic and cultural institutions are key for driving intentions to experience the arts and culture of a country. Again, like investing in a master's course at the London School of Economics or MIT, the decision to engage is in part transactional. Enjoyment of a country's culture drives further exploration and interest. People read *Harry Potter* and graduate to *The Lord of the Rings*. The chances are that anyone who has seen one movie set in the Marvel Cinematic Universe will have seen others in the franchise. That's why *Avengers: Endgame* has been such a massive global smash, becoming the highest grossing movie of all time, and why there is already such high expectations as the series moves into Phase 4, starting with the release of *Black Widow* in spring 2020. Scandi Noir snowballed into a global cultural phenomenon starting with Stieg Larsson's *Millennium* trilogy and Peter Høeg's *Miss Smilla's Feeling for Snow* and moving on to television shows like *The Killing* and blockbuster English language movies including *The Girl with the Dragon Tattoo*.

Everchanging tastes and the cycles of fashion are absolutely core to national attractiveness. While it may have been sneered at by the capital's cultural snobs, Cool Britannia really was a global cultural moment that saw appreciation of the UK's arts and culture at an all-time high. Japan is currently enjoying an equivalent global moment, albeit one that has yet to produce anything to rival Ginger Spice's iconic Union Jack dress.

18. *Powers of attraction* (n 6).

19. *Ibid.*

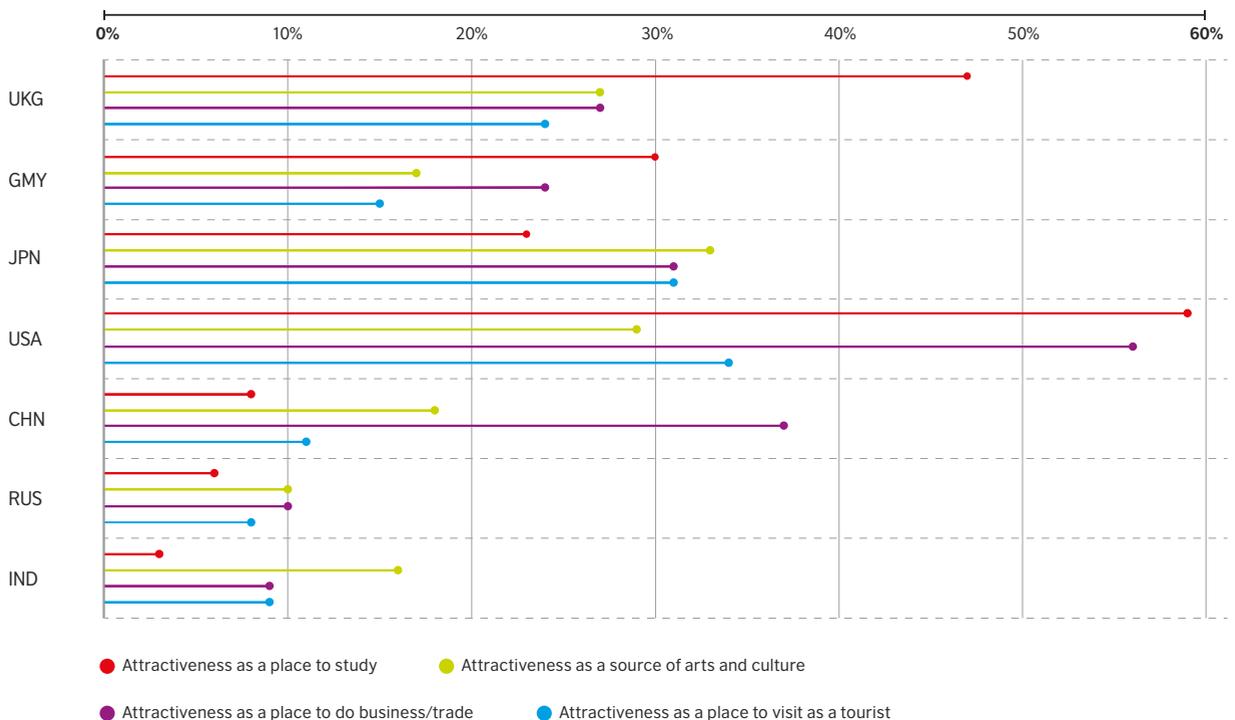
Such moments come and go. Cool Britannia is not so dissimilar to the 1960s British Invasion that remains a cultural reference point for so many of the USA's baby boomers. However, while appreciation of a country's culture is the main driver of intentions to engage again, other attributes are also important in different countries: academia, sports and people also emerge as key drivers across multiple territories.

Overall, what emerges from the data is that exposure increases positive perceptions of a country and further increases interest in engaging with it in future. So, to build a country's soft power, policymakers must focus on increasing familiarity while carefully avoiding instrumentalising, and thereby devaluing, what it is that makes the country attractive. Governments are generally less trusted than people or institutions and can by association undermine that which holds the greatest appeal. A little distance can go a long way as increases in trust and confidence in the government of a country can follow from the activities of non-governmental organisations that exemplify the values that are most attractive internationally. Broadly, the UK seems to have been successful in its handling of this tension, with government providing the resources necessary to underpin a healthy, vibrant culture while stepping back from directing and controlling the cultural and educational sectors that are so core to attractiveness.

While avoiding instrumentalising soft power there is immense value in investing in the infrastructure that can facilitate the development of familiarity through the sharing of a country's culture. For the UK, the British Council serves this function, facilitating cultural engagement and building knowledge and understanding of UK society, in partnership with other cultural and educational organisations and institutions.

There is also place for overt marketing campaigns like the UK government's GREAT campaign. Handled sensitively, these can help raise awareness and improve perceptions just as Cool Britannia and London 2012 did without significantly undermining trust. These two latter cultural moments were aided and abetted (and exploited) by the government but crucially were not overshadowed by it. Their success came from their authenticity and integrity, trimmed as with everything in the UK with a sense of humour and that curiously British chemistry of the absurd and sentimental. That 2012 summer presented a version of the UK at its very best, with even the grumpiest of Londoners suddenly smiling and cheerful while they patiently queued for Paralympic dressage in Greenwich in the pouring rain, all the time blissfully unaware of how they were increasing the UK's international appeal.

**Figure 11:** Attractiveness of countries as a place to study, to visit, to do business/trade and as a source of arts and culture



\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

**Table 3:** What drives intention to visit each comparator country?

	UKG	USA	GMY	RUS	IND	CHN	JPN
Values diversity	4%	1%	3%	4%	15%	9%	0%
Open and welcoming	1%	7%	2%	4%	17%	9%	11%
World-leading arts and culture	12%	7%	6%	15%	24%	10%	12%
World-leading sports	10%	12%	8%	4%	3%	2%	0%
Fosters creativity	5%	3%	7%	4%	4%	2%	0%
World-leading universities	12%	8%	10%	3%	3%	2%	8%
World-leading science and tech	3%	9%	7%	5%	3%	12%	18%
Global power	7%	20%	7%	17%	4%	25%	2%
Democratic society	5%	3%	3%	3%	2%	2%	0%
Treats everybody fairly	3%	2%	2%	4%	1%	2%	1%
Works constructively	3%	2%	6%	4%	3%	4%	1%
Aids development	2%	0%	0%	2%	0%	0%	0%
Good public services	7%	5%	10%	3%	0%	4%	14%
A force for good	2%	0%	2%	2%	2%	5%	4%
Respects the rule of law	3%	3%	4%	5%	2%	9%	14%
Values individual liberty	5%	4%	8%	4%	2%	0%	5%
Respects different faiths	4%	2%	4%	4%	8%	3%	4%
Strong NGOs	3%	5%	4%	3%	4%	0%	2%
Free and fair justice system	3%	3%	6%	4%	2%	1%	5%
Free press media	6%	4%	2%	4%	0%	0%	0%

**Table 4:** What drives intention to do business/trade in each comparator country?

	UKG	USA	GMY	RUS	IND	CHN	JPN
Values diversity	4%	6%	4%	3%	4%	9%	2%
Open and welcoming	8%	2%	1%	8%	12%	7%	8%
World-leading arts and culture	0%	6%	8%	3%	0%	3%	5%
World-leading sports	12%	0%	4%	3%	7%	3%	1%
Fosters creativity	5%	9%	8%	5%	11%	7%	6%
World-leading universities	2%	5%	6%	4%	2%	3%	9%
World-leading science and tech	3%	7%	9%	6%	8%	5%	0%
Global power	2%	0%	2%	0%	5%	5%	0%
Democratic society	6%	5%	5%	7%	5%	3%	5%
Treats everybody fairly	6%	4%	5%	5%	3%	3%	5%
Works constructively	3%	5%	5%	5%	11%	7%	4%
Aids development	2%	4%	4%	5%	2%	4%	3%
Good public services	5%	6%	4%	5%	4%	7%	11%
A force for good	5%	6%	3%	5%	2%	6%	7%
Respects the rule of law	5%	6%	4%	7%	6%	9%	6%
Values individual liberty	5%	6%	10%	8%	3%	0%	7%
Respects different faiths	6%	6%	4%	5%	5%	4%	6%
Strong NGOs	4%	6%	5%	5%	3%	4%	3%
Free and fair justice system	9%	7%	5%	3%	3%	6%	8%
Free press media	8%	6%	5%	7%	4%	4%	3%

\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

**Table 5:** What drives intention to study in each comparator country?

	UKG	USA	GMY	RUS	IND	CHN	JPN
Values diversity	4%	3%	1%	5%	0%	7%	4%
Open and welcoming	2%	3%	3%	6%	5%	8%	3%
World-leading arts and culture	2%	5%	3%	5%	4%	13%	5%
World-leading sports	7%	0%	1%	1%	8%	2%	2%
Fosters creativity	9%	12%	16%	6%	14%	6%	5%
World-leading universities	13%	11%	18%	6%	6%	3%	8%
World-leading science and tech	6%	11%	11%	4%	4%	0%	0%
Global power	2%	0%	4%	0%	4%	0%	0%
Democratic society	3%	5%	4%	5%	6%	3%	3%
Treats everybody fairly	5%	4%	4%	6%	4%	4%	6%
Works constructively	3%	3%	4%	6%	7%	2%	4%
Aids development	2%	3%	3%	5%	3%	6%	6%
Good public services	6%	6%	7%	3%	7%	7%	11%
A force for good	3%	4%	3%	7%	4%	8%	5%
Respects the rule of law	4%	6%	2%	8%	3%	7%	7%
Values individual liberty	4%	5%	6%	6%	4%	4%	10%
Respects different faiths	5%	5%	3%	6%	3%	7%	8%
Strong NGOs	4%	5%	2%	4%	5%	5%	4%
Free and fair justice system	9%	4%	3%	4%	5%	4%	4%
Free press media	7%	4%	2%	6%	4%	4%	4%

**Table 6:** What drives intention to experience the arts and culture of each comparator country?

	UKG	USA	GMY	RUS	IND	CHN	JPN
Values diversity	6%	1%	3%	5%	16%	10%	3%
Open and welcoming	1%	7%	2%	6%	19%	8%	7%
World-leading arts and culture	15%	13%	10%	21%	33%	20%	16%
World-leading sports	10%	8%	3%	6%	2%	4%	0%
Fosters creativity	3%	7%	3%	7%	2%	6%	4%
World-leading universities	14%	7%	5%	9%	2%	5%	7%
World-leading science and tech	2%	7%	5%	0%	2%	8%	20%
Global power	8%	6%	6%	9%	3%	11%	0%
Democratic society	4%	2%	6%	3%	1%	1%	1%
Treats everybody fairly	1%	4%	4%	5%	1%	2%	2%
Works constructively	3%	3%	7%	4%	3%	4%	0%
Aids development	2%	2%	3%	4%	0%	0%	1%
Good public services	6%	5%	5%	6%	0%	2%	14%
A force for good	4%	5%	4%	2%	3%	5%	5%
Respects the rule of law	1%	6%	6%	4%	2%	7%	10%
Values individual liberty	7%	5%	9%	3%	1%	0%	6%
Respects different faiths	6%	4%	4%	1%	6%	3%	2%
Strong NGOs	3%	3%	7%	2%	3%	1%	1%
Free and fair justice system	3%	3%	3%	3%	0%	1%	2%
Free press media	2%	4%	4%	1%	0%	1%	0%

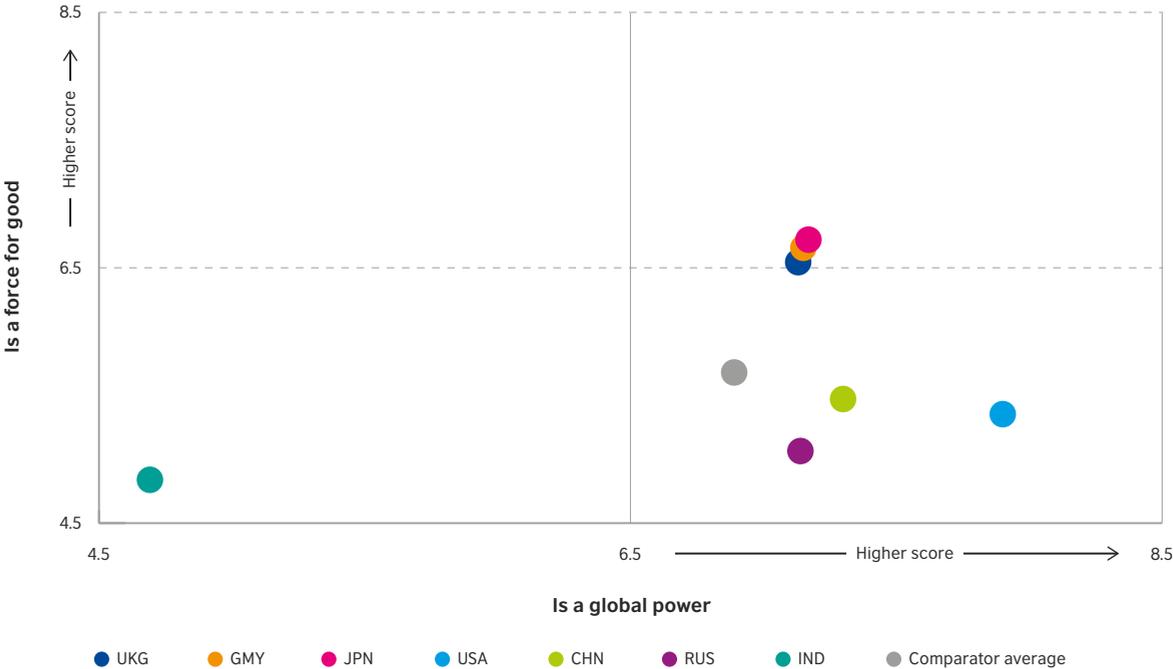
# A complex interplay between hard and soft power

The quantitative analysis of the perceptions of young people in the G20 reveals an interesting relationship between a state's national power and whether or not a country is seen as a positive international player. Figure 12, right, plots the results of the question about whether a country is a force for good in the world against whether it is a global power. The countries respondents viewed as the most powerful – China and the USA – scored significantly behind Japan, Germany and the UK for is a force for good. While Russia scored similarly to the cluster of Japan, Germany and the UK for is a global power, it is second to last for a force for good. India is the strong outlier, coming seventh across both indicators. The USA's vast hard power, and perhaps more pertinently its apparent willingness to leverage that power to its own advantage, negatively affects how it is perceived. China is viewed more positively in terms of the force for good metric than the USA but is significantly behind the UK, reflecting perhaps a degree of wariness of the rise of China as a global force among young people across the wider G20.

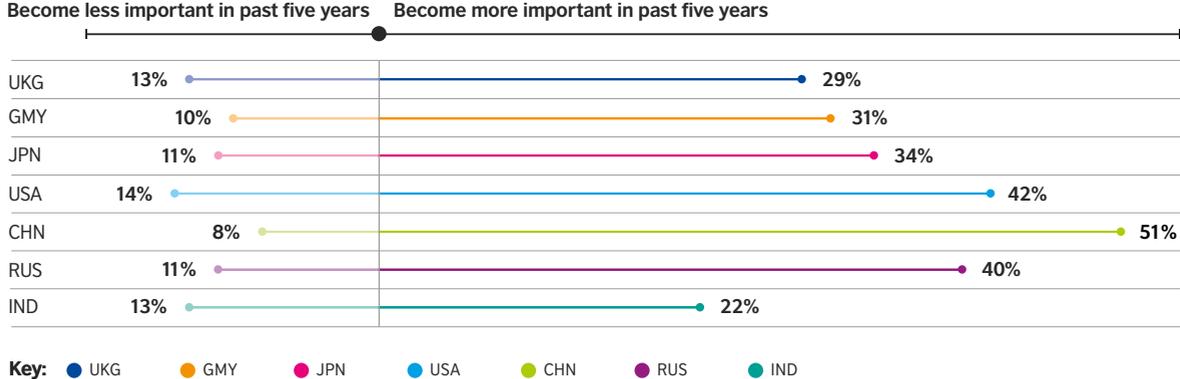
In addition to the 20 soft power qualities listed in the survey that we asked respondents to rate the seven comparator countries against, we also asked: 'Do you think the role each of these countries play in the world has changed in the past five years?' Figure 13, right, explores this metric in more detail. The UK and India both score the same (13 per cent) for has become less important in the past five years, surprisingly only exceeded in the negative by the USA (14 per cent). The UK is marginally ahead of India for has become more important (29 per cent versus 22 per cent). The USA's scorings are especially interesting, despite scoring the highest for has become less important, it is also second for has become more important (42 per cent versus China's 51 per cent), though it is only two per cent ahead of Russia. In recent years Russia has repeatedly demonstrated its capability to project power, both in its own neighbourhood and farther afield in the Middle East, North Africa and the West. Russia is seen as not only having the resources to act but also the willingness to do so. Capability appears to matter almost as much as capacity when it comes to perceptions of a state's national power. While no one doubts the USA's unrivalled power, the willingness of both it and other Western states to risk direct action is more open to question. The real 'winner' on this metric is China. Only eight per cent of respondents thought it had become less important over the past five years compared to the 51 per cent who considered it to have become more important. It would seem that the rise of China has not gone unnoticed.

**Capability appears to matter almost as much as capacity when it comes to perceptions of a state's national power.**

**Figure 12:** The relationship between perceived power and being seen as a force for good



**Figure 13:** How perceptions of the focus countries' importance have changed in the past five years



\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

Figure 14, right, plots responses to the question of whether countries play a more important role in the world than five years ago against is a global power. Here again, India is alone in scoring low for both. And again, as we have seen throughout this report, Japan, Germany and the UK form a cluster, though here there is more differentiation between the three in terms of being perceived as more important than five years ago, with the UK lagging behind the other two. Of the seven countries the USA and China are the standout leaders in terms of perceptions of growing importance and power, with Russia a little farther behind. When we plot is more important than five years ago against is a force for good (Figure 15, right), a familiar pattern emerges – Japan, Germany and the UK are clustered together. An albeit looser association can be seen between China, Russia and the USA, with India again occupying the bottom left corner of the chart. What the data shows is that, at least for this group of countries, there is an apparent tension between being seen as a great power in the traditional hard power sense of being a leading military power and being perceived as a positive force in the world. This may explain why the UK, a P5 power with the sixth largest defence budget<sup>20</sup> in the world, falls behind Germany and Japan as a force for good in the world.

Interestingly, the clustering we see in Figures 12–15 reappeared when respondents were asked ‘how well do you believe [country X] supports and encourages the values that you think are important in the 21st century?’ (see Figure 16 on page 32). Japan, Germany and the UK score almost identically in both positive and negative responses to this question. Japan scores 16 per cent for very poorly/fairly poorly and 52 per cent for very well/fairly well, while the breakdown for Germany is 13 per cent/54 per cent and for the UK 15 per cent/51 per cent. The USA has an identical score to China for very poorly/fairly poorly (33 per cent) and is only slightly ahead for very well/fairly well (38 per cent versus 33 per cent). Russia is ten percentage points behind the USA for very well/fairly well on 28 per cent, but is only two per cent higher for very poorly/fairly poorly (35 per cent). India’s scores are quite similar to Russia’s (37 per cent for very poorly/fairly poorly, 22 per cent for very well/fairly well). If we look across the broad sweep of societal/values metrics in the qualities dataset, factors such as people value diversity and cultural difference, respects the rule of law and treats everybody who lives in the country fairly, Japan, Germany and the UK all have very similar scores. The USA lags somewhat behind but is, usually, ahead of Russia, China and India. Germany, Japan and the UK may not be seen as being as important or powerful as the P5 powers of China, Russia and the USA, but because they are perceived as holding the ‘right’ values and, crucially, as acting in accordance with those values on the international stage, they are viewed more positively.

**There is an apparent tension between being seen as a great power in the traditional hard power sense of being a leading military power and being perceived as a positive force in the world.**

20. International Institute for Strategic Studies (viewed on 30 October 2019) Top Defence Budgets 2018 (US\$bn), including total European NATO spending. Available online at: <https://www.iiss.org/-/media/files/publications/military-balance-2019/mb2019-defence-budgets-branded.ashx?la=en&hash=C560EFFEC61FA0816B61B8A005215F0510F449EC>

Figure 14: The relationship between power and being seen as growing more important over time

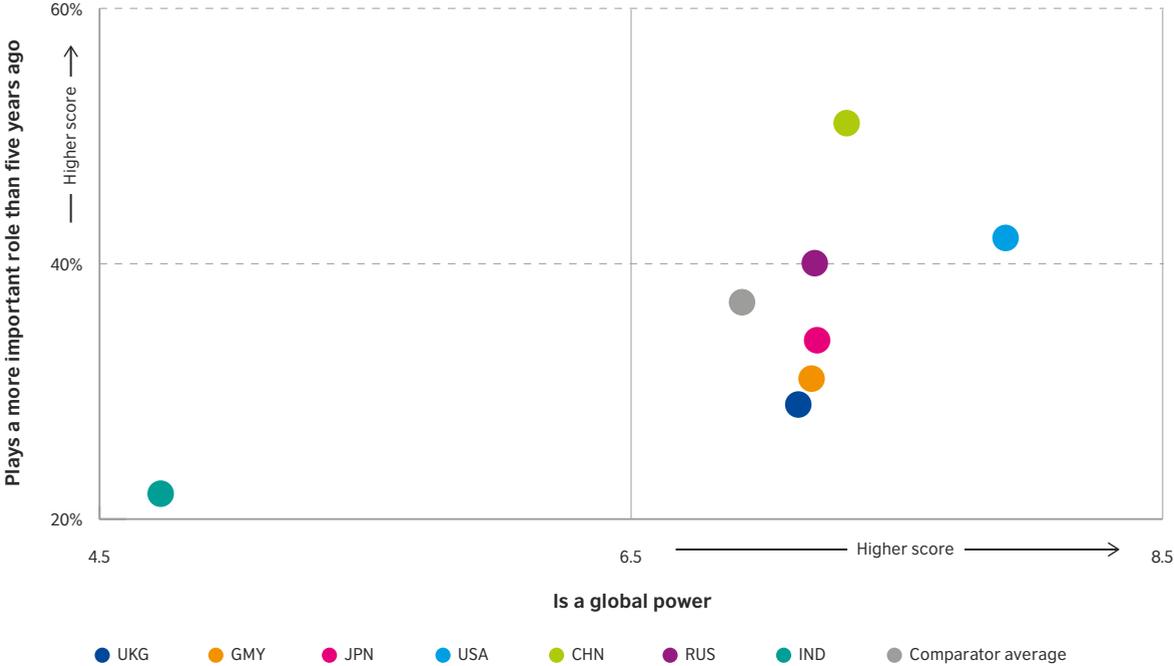
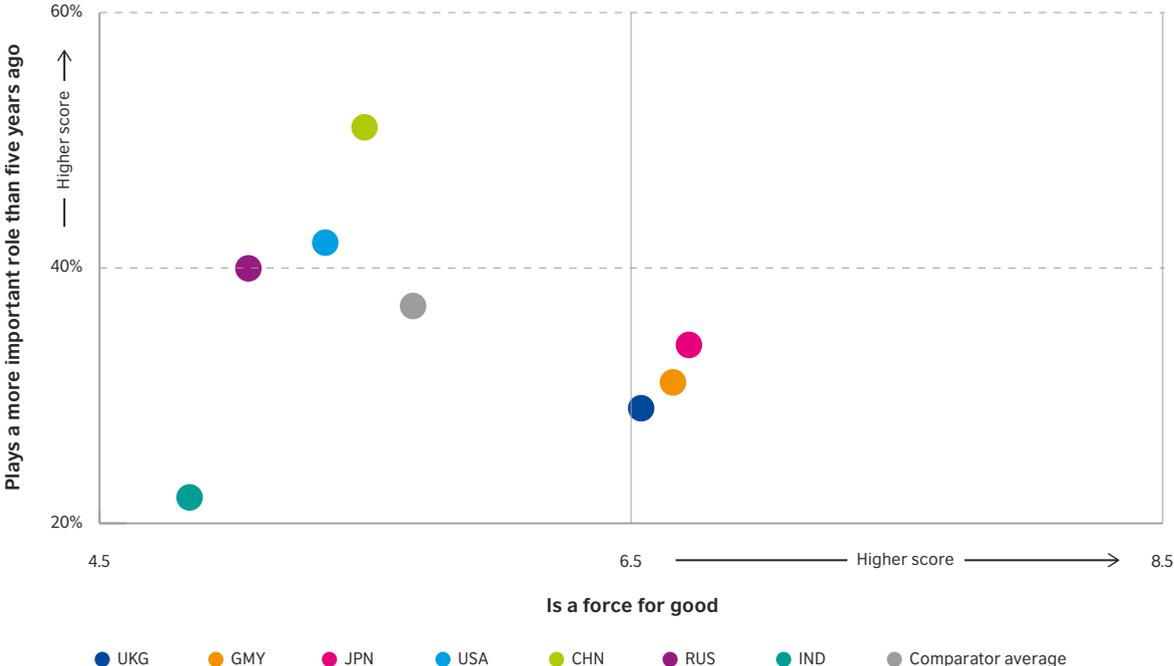


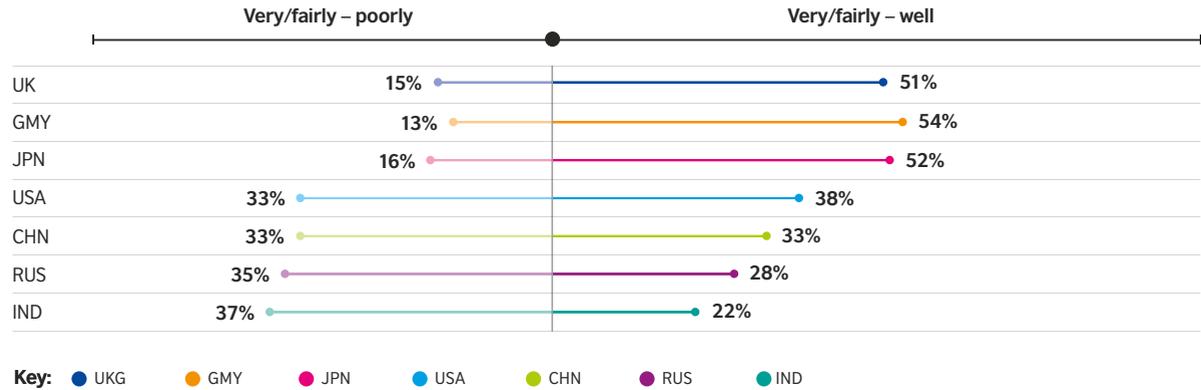
Figure 15: The relationship between being seen as a force for good and as growing more important over time



\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

**Figure 16:** Perceptions of countries’ support and encouragement for the values respondents consider important

Perception of each country amongst all G20 countries



\* See Appendix, pp. 48–49, for full details of the data, base and survey questions.

What the findings of the analysis suggest is that there is an inverse relationship between a state’s national power and whether it is perceived as a positive force in the world. This is not altogether surprising. There is a complex interaction between a state’s hard and soft power. Whenever a state deploys the levers of hard power there will almost inevitably be an impact on that country’s soft power, or more correctly a range of impacts with different state and non-state actors. Hard power can foster resentment and fear, forces antithetical to trust. If a country’s hard power is perceived as a threat, it will inspire a reaction, whether that’s increases in defence spending and/or the building of alliances. This appears to be what the data is revealing.

However, hard power can also have a positive impact on perceptions of a state. The international goodwill generated by the British military intervention in Sierra Leone in 2000 to support the country’s government and the UNAMSIL mission soldiers is an example of a country’s hard power enhancing its soft power. A country’s soft power can also legitimise its use of hard power. If a state is perceived as a broadly benevolent force in the world that uses its power to secure a better future for the whole planet, rather than just for its own advantage, its hard power can be accepted, even welcomed. A strong, powerful country that exemplifies the values that are most appealing internationally, and is seen as acting in accordance with those values on the global stage, will be viewed as more attractive and trustworthy than one that is seen as belligerent and uncaring. This is why the UK’s commitment to international development is so

crucial to its international influence and attractiveness. That commitment, combined with a proven capability to act in support of others and a positive approach to collective international action on global issues such as climate change, underpins the UK’s international position.

Hard power affects a country’s soft power in ways that are often complex and subtle, and that vary between different groups and audiences. The same is true in reverse. They can be in tension, or they can be aligned so that they complement and reinforce rather than undermine one another – what leading commentators like Joseph Nye have referred to as ‘smart power’. Neither can be discussed in isolation; they must be seen as part of an essential continuum.

Germany, Japan and the UK form a very distinct cluster that can be seen repeatedly emerging from the data throughout this analysis. While this study generally follows the formula of a competitor analysis and has made a point of highlighting the fragility of the UK’s premier position, it is also worth considering how these likeminded states can maximise their influence through co-operation. They are at their most effective when they speak and act as one, especially when they do so alongside other leading liberal democracies such as Canada and France. Working multilaterally, in accordance with the values they share, and others admire, especially when it is through established forums such as the UN, the G20 and other international bodies, they can set the international agenda. These states are seen as having integrity, as acting for the common good.

Working together amplifies their voices, with the reputation of the one enhancing and legitimising the others. This is especially important where an individual country is not trusted, perhaps because of historical conflicts or a colonial past. By working in concert reservations about an individual state matter less.

Perhaps ironically, being perceived as less powerful than the other focus countries in the study actually enhances the UK's international appeal. It is not perceived as a potential threat or rival in the same way as China, Russia or the USA. Further, unlike its fellow P5 states, it is seen as using the power it has for the common good. Nevertheless, there will be those that are concerned about the UK's relative standing on the metric of being more or less important than five years ago. The survey results do not identify a cause for the UK's standing relative to the other focus countries. Brexit is an obvious target, though perhaps not for the reasons some might think; the British people's decision to leave the European Union has not been as universally derided around the world as some would have people believe.<sup>21</sup> Arguably, the prolonged period of introspection and uncertainty that followed the 2016 vote was more damaging to the UK's international standing than the decision itself. However, it is also the case that successive governments have made significant cuts to the resources of the Foreign and Commonwealth Office (FCO), Ministry of Defence, British Council and other institutions vital to the country's international influence. The decline in the resources of the FCO, a long-term trend that predates the advent of 'austerity' under the coalition government, has been explored at length in the British Foreign Policy Group's (BFPG) recent paper *Running Out of Credit? The Decline of the Foreign Office and the Case for Sustained Funding*.<sup>22</sup> The BFPG found that:

*As it stands the Government already spends around 2.75% of GDP on international engagement expenditure. But this figure is shared between defence, international trade, exiting the EU, international development, the intelligence agencies, and expenditure on the Foreign Office.*

*Lifting government expenditure to 3% of GDP would raise an additional £4.9 billion, £1.5 billion of which could be spent on the Foreign Office. Such an increase would still leave the Foreign Office as one of the lowest spending departments in Whitehall.*

The report highlights that staffing levels have halved between 1985 and 2017, falling from over 8,354 to 4,003, with nearly 1,000 staff being lost since 2010. The situation is further complicated by the spending restrictions placed on the FCO and its sponsored bodies, which mean that much of its funding is ringfenced and cannot be spent in the developed world.

**Being perceived as less powerful than the other focus countries in the study actually enhances the UK's international appeal.**

21. Powers of attraction (n 6).

22. British Foreign Policy Group (n 10).

The UK's ability to influence global affairs has been undermined by a lack of strategic thinking and a Treasury so eager to cut costs that it has undermined the UK's capability to project itself effectively on the global stage. So far, the impact on the UK's soft power has been limited, but undermining the infrastructure through which the UK engages with the world will have a deleterious impact over time. For instance, as the US baby boomer generation gives way to a new, more diverse USA that is more familiar and comfortable with Latin America than it is with the UK, the hallowed 'special relationship' could become a historic footnote rather than a living partnership. The UK cannot coast on past achievements, especially not when other powers both friendly and rivalrous are so focused on growing their international influence through investment in the architecture of international engagement.

### The case of India

The results for India on the qualities questions in the survey are especially interesting. One of the reasons for including India in the selection of focus countries was an 'informed intuition' that it was being underestimated in the various charts of soft power. The world's largest democracy and fifth largest economy,<sup>23</sup> India under Prime Minister Modi has been an increasingly engaged economic and military power keen to make its presence felt on the international stage. See, for example, India's active role in the Quadrilateral Security Dialogue, its renewed commitment to the Commonwealth and increasing collaboration across a range of issues with Brazil, Russia, China and South Africa. India's prominence regionally is also seen in its fourth place in the Lowy Institute's Asia Power Index.<sup>24</sup> Its continued underperformance in charts like the Portland Soft Power 30 has as a result seemed incongruous, especially given the major push by the Indian government to build its soft power with successful, high-profile initiatives like the new International Day of Yoga and a highly ambitious space programme. Yet India again failed to make the cut in the Portland Soft Power 30 in 2019. Respondents to the British Council's G20 survey ranked India ahead of only Saudi Arabia for overall attractiveness and trust.

On the detailed metrics of the deep dive, India came in last of the seven focus countries for the majority of indicators but performed better in some of the societal factors, for example press freedom.

However, what comes across most clearly from the results is the gap between perceptions and reality. India is ranked behind both Russia and China for 'is a strong example of a democratic society' despite being the only actual functional democracy of the three. Freedom House<sup>25</sup> ranks India as 'Free', while both China and Russia are judged to be 'Not Free', reflecting the differences between the political and civil rights enjoyed by Indians compared to the peoples of Russia and China. Like Germany's better scorings than the UK for international aid, there is an evident gap between reality and perceptions. There are a variety of factors affecting perceptions of India. Certainly, a lack of experience and familiarity is a part of the disconnect between attitudes and reality, something we highlighted above. In the UK, for example, media coverage of India tends to be limited. What little there is tends to focus on security issues. There is very little coverage indeed of India's rich and varied culture, with the honorable exception of the coverage on the BBC World Service and perhaps one or two other outlets.

Perceptions are always partial, reflecting all the biases and preconceptions that we all hold. They can be grossly unfair, especially where they are founded in the ignorance that is inevitable when direct experience and understanding are limited or absent. For example, Westerners may have some dull awareness of the 'untouchables' but have no real idea about life in India today. They almost certainly won't know, for example, that there are quotas for the Lok Sabha (House of the People) to ensure Dalits are represented. Sadly, the same grotesque ignorance that still leaves many Britons thinking Africa is a homogenous 'country' populated by perennial victims with no agency of their own also colours perceptions of India. The media's obsession with Z-list celebrities and reality television in preference to giving airtime to serious coverage of international affairs plays a significant role in perpetuating myths

23. World Bank data (accessed 30 October 2019) GDP (current US\$) World Bank national accounts data, and OECD National Accounts data files. Available online at: [https://data.worldbank.org/indicator/ny.gdp.mktp.cd?most\\_recent\\_value\\_desc=true](https://data.worldbank.org/indicator/ny.gdp.mktp.cd?most_recent_value_desc=true)

24. Lowy Institute (accessed 30 October 2019) Asia Power Index. Available online at: <https://power.lowyinstitute.org/countries.php?profile=IN>

25. Freedom House (accessed 30 October 2019) *Democracy In Retreat: Freedom in the World 2019*. Available online at: <https://freedomhouse.org/report/freedom-world/freedom-world-2019>

and dated stereotypes. The decline in serious, nuanced coverage of international affairs in both the UK and other Western nations is a disgrace. It is as if maps of the world should once again have whole areas marked 'here be dragons'.

But while ignorance and prejudice must surely be in part to blame for perceptions of India, there are also other important factors at play. There is, for example, a complex relationship between perceptions of soft and economic power. It is no accident that the countries identified as the world's leading soft powers are all leading economies. However, it is more subtle than simple economic size. The World Bank divides the world's economies into four groups: high, upper-middle, lower-middle and low. The income classification is based on a measure of national income per person, or GNI *per capita*. In the British Council's G20 survey, the top half of the rankings for overall attractiveness are dominated by high-income countries, with only ninth-placed Brazil (an upper-middle-income economy) breaking the pattern.

By contrast, the bottom half of the chart is dominated by the middle-income economies of the G20, with the only two lower-middle-income countries in the group, India and Indonesia, in 17th and 18th place respectively. GNI *per capita* appears to be a better predictor for the rankings for attractiveness and trust than GDP, suggesting that a state's soft power may owe more to perceptions of economic development and individual levels of wealth across a society than overall economic size. This accords with the performance of relatively smaller economies with high GNI *per capita* in the Portland rankings in comparison with other countries with much higher overall GDP. Finland, for example, is ranked 45th in the world for GDP,<sup>26</sup> but it has a GNI *per capita* of \$48,490<sup>27</sup> and takes 15th place in the Soft Power 30. Neighbouring Russia is ranked 12th for GDP but has a GNI *per capita* of \$26,470 and takes 30th place in the Portland league table. The GNI *per capita* figure for India is \$7,600, placing it far behind the other focus countries in the study. It is likely that perceptions of the country's economic development relative to the other focus countries are the most significant factor behind the results for India.

### The contradiction of the USA

One of the most striking features to emerge from successive editions of the British Council's G20 survey is the waning of US soft power. The USA, the country with the highest GNI *per capita* (\$63,390) in the G20, comes behind fellow liberal democracies Germany (\$55,800), Japan (\$45,000) and the UK (\$45,660) in the rankings for attractiveness and trust. In other words, having neither the largest nominal GDP nor the highest GNI *per capita* is a guarantee of soft power supremacy. Other factors can still outweigh the impact of levels of development and wealth on perceptions of a state's overall attractiveness. Throughout the late 20th century and into the early years of the current one, the USA was broadly, though not universally, perceived as a beneficent force in the world. Despite its great power it was viewed as acting in the common good rather than narrow self-interest. That perception legitimised its power, allowing most other states to feel comfortable with rather than threatened by its hegemony. Further, in the face of the perceived threat from the Soviet Union, many Western states relied upon and welcomed the USA's power. The USA was seen as the guarantor of freedom and democracy, but more than that, it was the leading exponent of liberal values and seen as having the most robust and effective institutions. It was seen by many as the country that was the Platonic archetype for a free, liberal, democratic society, especially for those deprived of those freedoms in their own countries.

26. Statistics Times (accessed October 30 2019) GDP Nominal Ranking 2019. Available online at: <http://statisticstimes.com/economy/projected-world-gdp-ranking.php>

27. World Bank data (accessed October 2019) GNI per capita PPP (current international \$). Available online at: <https://data.worldbank.org/indicator/ny.gnp.pcap.pp.cd>

Yet where once the USA was seen as a beacon for liberty, today the US government is more distrusted than any of the seven focus countries, and indeed than any other in the G20 group of nations. This is a staggering finding for the country that once prided itself on being the leader of the free world. The knee-jerk reaction of many liberals would be to blame the current US administration for the decline in the country's global appeal, but the downward trend in perceptions predates the 2016 election and the rise of the rhetoric and policies of 'America First'. Ironically, the myth of the shining city on the hill has floundered as the world has grown more familiar with the USA and the deep economic and social divisions that have long scarred the country. The Iraq War, the global financial crisis, the government's response to Hurricane Katrina and other events have all contributed to the decline in perceptions of the USA. These events have highlighted the economic inequalities, political and institutional dysfunction, and racial divisions of the USA. In essence, an idol was found to have feet of clay. Arguably because the USA was held in such high regard, the reaction has been even stronger than might have been expected or indeed fair.

The challenge posed by the decline in the USA's soft power has not gone unremarked:

*Being powerful matters a lot in world politics, but being popular or at least respected isn't irrelevant. The United States won the Cold War in part because it was stronger and more resilient than the Soviet Union, but also because Washington's values and actions – for all of its shortcomings and hypocrisy – proved more popular with most of the world than Moscow's did. This is an advantage the United States probably still retains as its competition with China heats up ...<sup>28</sup>*

... but the challenge is that much greater as trust and respect in the US government declines.

The USA's pre-eminence in hard power is negatively affecting its soft power in a way that sets it apart from its peers. Whether it's the heavy, war-torn mantle of being the world's policeman, or perceptions of the contribution of US banks, firms and policies to the 2008 global financial crisis, or a combination of these and myriad other individual factors, the USA's unavoidable hard power often appears to undermine rather than enhance its international appeal. Indeed it is caught in a vicious cycle. Where once US soft power legitimised its hard power advantage over other states, today as its soft power declines it is becoming ever more dependent on coercion to achieve its international objectives, which in turn further undermines its soft power, leaving both allies and rivals alike more wary and resistant, thus weakening its ability to project influence.

**The USA's pre-eminence in hard power is negatively affecting its soft power in a way that sets it apart from its peers.**

28. Stephen M Walt (29 July 2019) Yesterday's Cold War Shows How to Beat China Today. *Foreign Policy*. Available online at: <https://foreignpolicy.com/2019/07/29/yesterdays-cold-war-shows-how-to-beat-china-today/>

# The UK, first among equals, for now

On the whole, the picture of the UK that emerges from the analysis is very positive. The UK is a ‘soft power superpower’, an assertion that the data supports. But what is also very clear in the results from the research is that the UK is first among equals. Its enviable position is also a precarious one. It would take only a few minor shifts in perceptions for the UK to fall to second or third place out of the seven focus countries. To maintain its lead with all its advantages in terms of FDI and international influence requires constant vigilance. The UK will need to carefully nurture and protect its areas of strength and, in an increasingly dynamic, competitive market, pay particular attention to its areas of vulnerability. The UK may be first among equals for now, but that is no guarantee it will remain so in the days and years ahead.

## Education, science and innovation

An ‘education system [that] fosters creativity and innovation’ and having ‘world-leading universities and academic research’ are two of the qualities metrics the UK scores very well on in the analysis, and both are important drivers of attractiveness, most obviously for decisions about overseas study but, as we have seen, also for tourism and cultural engagement. It’s not surprising that the UK should perform so well on these metrics. World-famous higher education institutions such as Cambridge, the London School of Economics, Oxford and Edinburgh are among the most popular destinations for international students exactly because they offer valuable, high-quality education and are centres of research excellence. The majority of international students are in undergraduate programmes, with postgraduate study also popular, but the UK’s schools are also seen as offering a highly attractive, good-quality education. The Independent Schools Council, for example, has highlighted that there were 28,910 overseas pupils, equating to 5.4 per cent of all pupils, in independent schools in the UK as of spring 2019.<sup>29</sup> Transnational education is another success story for the UK. In 2017–18, 693,695 students were studying for a UK degree at higher education institutions in Malaysia, Singapore and other countries. The UK is a world leader in this field – there are 1.5 times as many students studying for a UK degree overseas than there are international students studying in the UK. There are also thousands of students internationally taking UK examinations like the IGCSE and professional qualifications in everything from accountancy to health and safety.

However, that success cannot be taken for granted. Rivals both ancient and modern are all seeking to tap into the international student market. The USA remains the world’s most popular destination for international study, followed by the UK, but Australia, Canada, France and Germany are all proving increasingly popular choices, as the growth figures for 2017 show: USA +1.4 per cent, UK +0.9 per cent, Australia +13.6 per cent, Canada +10.8 per cent, France +5.3 per cent and Germany +5.8 per cent.<sup>30</sup>

**It would take only a few minor shifts in perceptions for the UK to fall to second or third place out of the seven focus countries.**

29. Independent Schools Council press release (26 April 2019) ISC Census 2019: European pupil numbers rise despite Brexit. Available online at: <https://www.isc.co.uk/media-enquiries/news-press-releases-statements/publication-of-isc-annual-census-2019/>

30. UNESCO Institute for Statistics (accessed 10 October 2019) Global-Flow of Tertiary Level Students. Available online at: <http://uis.unesco.org/en/uis-student-flow>

Rapidly improving domestic higher education offers in India and China will increasingly attract students to study at home rather than fill the classrooms (and funding gaps) of UK institutions. They are also attracting increasing numbers of foreign students: China's growth rate for international students was +14.2 per cent in 2017, in part due to a major recruitment drive across Sub-Saharan Africa. Indeed, measured on growth rate the UK underperforms all of the focus countries – both Japan (+14.6 per cent) and Russia (+2.8 per cent) are ahead. Yes, the UK and USA are currently ahead on raw numbers, but with competitors recording such impressive growth rates, the gap in the overall numbers is shrinking rapidly.

If the UK is to continue to be a world leader in education exports, it will need to address the challenges to growth. That means investment in the sector and, in particular, reform of the visa regime for students that has proved a significant drag on the sector's growth. Recently announced plans for the reintroduction of the two-year post-study work visa are therefore especially welcome. HM Government has recognised the importance of the sector to the UK with the publication of the international education strategy and the international research and innovation strategy. However, uncertainties over Brexit continue to be an issue with questions over the future of the UK's participation in the Erasmus+ programme and the successor to Horizon 2020 scheme still unresolved. What is crucially important about programmes like the Erasmus scheme is that not only does it bring people to the UK, it also mobilises UK citizens to engage internationally, building vital networks, connections and international expertise that benefit both the individuals and the UK economy.

The education sector is a vital element in the UK's international attractiveness. The experience of studying and living in the UK plays a critical role in shaping positive perceptions of the country. International students contribute £20 billion<sup>31</sup> to the UK economy, but in the longer term the experiences, connections and relationships that come from international study are even more important as they have such a crucial impact on decisions on future engagement, especially on doing business/trade with the UK. Among serving monarchs, presidents and prime ministers who undertook higher education abroad, 57<sup>32</sup> were educated in the UK. Only the USA has educated more leaders. That familiarity with the UK matters, as we have seen elsewhere in this report.

While the UK performs strongly for creativity and innovation and universities and research, it falls behind other competitor countries on perceptions of being 'at the cutting edge of science and technology'.

Given how important a factor science and technology is to attractiveness, this should be of particular concern to policymakers. In some ways it is an incongruous finding – the UK is recognised as a world leader in research but lags behind other countries for science and technology. Historically, the UK has been seen as the very model of modernity, the country that invented everything from the television set to gravity(!). At the height of the Empire people from the four corners of the world flocked to marvel at British science and industry at the Great Exhibition. And yet, despite the best efforts of Sir Tim Berners-Lee, 132 Nobel Prize winners for science<sup>33</sup> and Dolly the Sheep, the UK today falls significantly behind the other focus countries on the world-leading science and technology metric.

Perceptions of the UK suffer from not having the equivalent global tech brands to Japan, the USA, South Korea and China. That visibility to the general public is key. The global scientific community knows the calibre of the UK education and research sector, but the wider public simply does not share the same level of awareness. Everyone has an iPhone or an equivalent Samsung or Huawei smart device in their pocket. For many it is as much a mark of status as it is the essential tool for 21st-century living. Similarly, we watch television and play video games on machines that are Japanese or American. The Nintendo Switch is an ingenious piece of kit beloved by kids and adult gamers alike, while the PlayStation and Xbox platforms both continue to grow in popularity. Today the AI in your Bosch or Samsung fridge can order milk from the supermarket when it senses stocks are low. It's a similar story with cars. People drive German or Japanese cars. The car, that sleek, shiny technology so core to the everyday experience of so many, helps shape opinions of Germany. *Vorsprung durch Technik* (literal translation: advancement through technology) was a term that entered popular culture thanks to John Hegarty of London's Bartle Bogle Hegarty ad agency. Both in the UK and beyond, it has come to epitomise the sophistication and superiority of not only Audi but German engineering as whole. The UK is associated with cool, quirky and luxury cars – Jaguar, the Mini, Rolls-Royce, Land Rover – but somehow these are niche exceptions rather than exemplars of a broader tech offer. There simply isn't the equivalent hi-tech brand in one's everyday surroundings that shouts 'Made in Britain'.

Japan's lead on science and technology is not the least surprising. It enjoys a global image as a high-tech, chic and modern global leader. Despite debuting back in 1964, the Shinkansen, the bullet train network, remains a benchmark in technological brilliance. Perhaps if the

31. Sean Coughlan (11 January 2018) Overseas students 'add £20bn' to UK economy. BBC News. Available online at: <https://www.bbc.co.uk/news/education-42637971>

32. Nick Hillman (14 August 2018) UK slips behind the US, which takes the number one slot, for educating the world's leaders. Higher Education Policy Institute. Available online at: <https://www.hepi.ac.uk/2018/08/14/uk-slips-behind-us-takes-number-one-slot-educating-worlds-leaders/>

33. World Atlas (accessed 30 October 2019) Nobel Prize Winners By Country. Available online at: <https://www.worldatlas.com/articles/top-30-countries-with-nobel-prize-winners.html>

Concorde programme had proven as successful, the UK's reputation in the science and technology space would be different today. What is fascinating about Japan especially is how it has successfully married bullet trains, the PlayStation VR, dazzling, neon-lit high rises, Pokémon and karaoke with a widely celebrated culture and heritage, epitomised for many by tea ceremonies, Hokusai's woodblock prints and the Chureito Pagoda. Japan is perhaps uniquely successful at being both deeply traditional and thoroughly modern, with both very different stereotypes serving to enhance rather than counteract one another in people's perceptions. Perhaps in contrast, the UK today is recognised more for its past than for its present, with potentially worrying implications for its future.

Brand is certainly a key part of the perception problem. Much of the UK's tech expertise is 'under the bonnet' and/or only known to those already active in the sector. The UK is a world leader in satellite technologies, but the space programme of the UK Space Agency is far less well known than that of NASA or Roscosmos. Today it's the exploits of China and India on the final frontier that make the news. Where a UK tech firm does enjoy success it will often be bought up by a foreign firm, as happened with DMG, the company behind the hugely influential Grand Theft Auto franchise that is now part of Rockstar Games. Alternatively, a company might retain its independence and be highly successful and well known in its own sector as a crucial partner/supplier but not be a household name, as is the case with Cambridge-based ARM, which produces central and graphics processing units and machine learning processors and is very much at the forefront of the 5G tech revolution.

DNEG is one of the world's leading special effects studios and has bagged five Oscars for its work on movies such as *Ex Machina*, while MPC, based in London's Wardour Street, was behind much of the visual effects in Disney's 2019 *Lion King* remake. London's Soho and its surrounds have been a hub of brilliance and innovation for decades and are today home to some of the world's most important digital artists and studios. Yet very few outside those making production decisions in Hollywood recognise that expertise as British. Disney is the brand everyone knows and associates with dazzling special effects. MPC is only really known by those in the sector. The UK visual effects sector doesn't get the recognition it really deserves, because it is usually working on movie projects for foreign studios, even when the IP is something as quintessentially British as *Harry Potter*. The corporate and political

culture of the UK is unlikely to change dramatically; after years of failure the UK finally gave up on national champions in the Thatcher era and has since grown largely comfortable with the foreign ownership of businesses. Indeed, the very openness of the UK to foreign investors is an important aspect of the UK's appeal as a place to do business/trade. Instead of trying to imitate South Korea's chaebol model, the UK should explore other routes to promote awareness of the savviness of the country's science and tech sector. Increasing awareness and familiarity is key and can in part be driven by marketing and public celebration of the achievements of companies like MPC. The Innovation is GREAT campaign is an example of the kind of interventions government can make.

While brand awareness is clearly a major contributor to perceptions of the UK's science and tech sector comparative to the other focus countries, it must also be owned that the UK simply lags behind other states when it comes to investment in research and development (R&D). According to the Organisation for Economic Co-operation and Development (OECD) total R&D expenditure in the UK in 2017 represented 1.66 per cent of GDP. Compare that to Germany's 3.04 per cent, Japan's 3.21 per cent and the USA's 2.79 per cent. In fact, based on R&D spend the UK is perhaps seen more positively than is really fair as China comes behind it on the world-leading science and tech metric despite investing 2.15 per cent of its GDP in R&D. The UK ranked 11th out of EU countries for R&D expenditure as a percentage of GDP in 2017, with spending significantly below the OECD average of 2.37 per cent. While the UK government has been increasing investment in R&D in recent years, it has much ground to make up on the market leaders. Of course, the primary reason to invest in R&D is economic; South Korea's 'Miracle on the Han River' has been founded on investment in science and technology. Here, spending as a proportion of GDP in 2017 was 4.55 per cent. The UK government has ambitions to match the average investment of the EU-28, with a target of 2.4 per cent of GDP by 2027,<sup>34</sup> but it really should be aiming significantly higher and in a shorter timeframe if it is to compete with other leading economies. The UK led the world in the first and second industrial revolutions before being overtaken by the USA for the third. Now, as the world experiences the Fourth Industrial Revolution, the UK risks being left far behind. That matters for perceptions of the UK as a global leader and influencer. It matters more for the future success of the UK economy.

34. HM Treasury (2019) Spending Round 2019. Available online at: [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/829177/Spending\\_Round\\_2019\\_web.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/829177/Spending_Round_2019_web.pdf)

It is not too great a stretch to say the challenge facing the UK today is like that of the USA at the height of the Space Race. It is worth considering the lessons of the response of the Eisenhower administration to the USSR's early lead in space science. Following the launch of Sputnik, the US government created NASA and the Defense Advanced Research Projects Agency (DARPA), and passed the National Defence Education Act (NDEA). While the shadow of the Cold War no longer hangs over the UK, the strategic challenges of the 21st century, whether in cybersecurity or the new Space Race, demand a similarly ambitious response. There have already been discussions about the creation of a UK version of DARPA to turbo charge UK science and innovation, but it is also worth considering the role of the NDEA in the USA's success in the 20th century. The NDEA brought forward significant funding for what today are referred to as the STEM (science, technology, engineering and maths) subjects but also, interestingly, for modern foreign languages and 'area studies', as it was seen as being as vital to the USA's interests to be able to understand and connect with the peoples of the world as it was to win the race for the Moon. It was in effect a mass mobilisation of the American people to step up to a role of global leadership. In challenging times, is it not time for a British version of the NDEA to ensure the UK retains its global influence and is ready for the Fourth Industrial Revolution?

### **Sport, culture and values**

Sunday 14 July 2019 was a glorious day for world sport – Lewis Hamilton won for a record sixth time at Silverstone, Novak Djokovic won the longest ever men's singles final at Wimbledon and at Lord's the England cricket team won the 'greatest one-day cricket match in history' to take the ICC Cricket World Cup. Eyes and ears around the world were fixed on televisions, tablets, radios and mobile phones as these great sporting dramas unfolded. On that one day the UK was the centre of global attention in a way not seen since the 2012 Olympics. Days like that Super Sunday matter. The analysis by GfK Social and Strategic Research reveals sport has a particular value to the UK's attractiveness. Uniquely among the seven competitor countries it is the single biggest driver of intention to do business/trade. This is a fascinating finding. One might reasonably expect openness, the justice system, levels of education and other socio-economic factors to be at the fore of attractiveness for hard decisions about trade and investment, not a cultural factor like sport that has no obvious implications for business competitiveness. These more predictable factors are prominent for the other focus countries, and they undeniably matter for the UK as well, but it is sport that presents most strongly in the analysis. Indeed, such is the strength of the positive association of sport with the UK that it presents as a top three attractor for cultural engagement and tourism as well as for business, again a unique position among the seven countries.

**It is not too great a stretch to say the challenge facing the UK today is like that of the USA at the height of the Space Race.**

Sport is accessible in a way that other cultural assets are not: the off-side rule does not need to be translated for football fans in different countries, unlike *Harry Potter*, which can only be comprehended by English speakers or through foreign language translations. The attention, that familiarity born of a longstanding association with some of the world's most popular sports, of being the 'home' of everything from golf to football is a significant factor in the UK's global appeal. Apart from sport the only other sphere where the UK commands such international interest is events like a royal wedding – the BBC estimated more than two billion people watched Harry and Meghan tie the knot in 2018. Other countries recognise the importance of sport to increasing international awareness and connectivity. Russia has recently hosted the FIFA World Cup and the Winter Olympics, while Japan is looking forward to the Tokyo 2020 Olympics and Paralympics after hosting a highly successful Rugby World Cup in 2019.

The jewel in the glittering crown that is UK sport is the Premier League. A report by EY<sup>35</sup> found that, internationally, 188 countries receive Premier League football broadcasts, making it the market leader in terms of global reach and engagement. The scale of the Premier League's contribution to the UK's image internationally can be seen in the data on broadcasting exports. In 2016–17 the league accounted for broadcast exports of £1.1 billion, surpassing the £0.9 billion total achieved by the BBC, ITV, Channel 4, Channel 5, Sky and the independent sector combined. On those figures it is clear that Premier League football has far greater international penetration than other popular cultural exports like *Downton Abbey* and *The Great British Bake Off*. The export data also reveals that Premier League football is more popular internationally than the other European football leagues and the North American sports leagues – the NBA, NFL, MLB and NHL. But while the Premier League is the undeniable king of the hill, for those who prefer world-class cricket, rugby, horse racing, cycling, swimming and/or athletics, again the UK is a leading destination. Indeed, it may be as much the diversity and plurality of the UK's unique sporting offer as the appeal of any one particular Premier League club that is behind the findings in the analysis around the importance of sport to the UK's international appeal.

The soft power value of sport to the UK should not be underestimated. Brands like the Premier League are essential to the international image of the country. Cultural icons, whether it's Harry Potter or the Rolling Stones, Rolls-Royce or Liverpool FC, all contribute hugely to the attractiveness of the UK, drawing tourists, students and business investment to the country. In sport and culture, the UK has the 'brand power' it lacks in the science and tech sphere. Man City and Man Utd are recognised as Manchester's leading brands and are

vitaly important to the promotion of the city as a place to live, study, visit and invest. Hosting football royalty matters. It affects the city's economy and, less obviously, its influence. From Singapore to Lilongwe to Mexico City, there are people around the world who have come to know and love Manchester through their support for one of the derby rivals. Football puts Manchester on the map: it makes people think of the city as an attractive destination, but it also causes them to look to Manchester's civic leaders for ideas in how to emulate the city's success.

In the past soft power has been seen as basically being about having 'cool stuff' that other people want. This is the soft power of iPhones and Levi's and Coke, attractiveness as a phenomenon born of prosperity and the trappings of success. People are naturally attracted to popularity and excellence. The international appeal of the Premier League can be seen through this lens, placing it alongside Apple and other global lifestyle brands. This is football as a consumer product.

Yet despite having its own league tables, soft power is concerned with so much more than trophies. As we have discussed elsewhere in this report, it is values rather than trinkets that are at the heart of soft power. Countries like the UK, Germany and Japan are seen as the most attractive and trusted by the peoples of the world because of their values – their political freedoms, civil rights and respect for justice and fairness, both domestically and internationally. Sport is the perfect vehicle for broadcasting to the world the values the UK holds dear – but in a subtle way that neither patronises nor alienates the audience. Football is a game of fair play governed by rules but also by trust and sportsmanship. Success comes through talent, ambition, hard graft and teamwork rather than privilege. Cheats may prosper but only until they are found out. UK sport is a showcase for modern, 21st-century Britain. The 2016 British Olympic and Paralympic squads were exciting, young, diverse and full of energy and optimism. Its medal-winning heroes Mo Farah, Jessica Ennis-Hill, Jonnie Peacock and Susie Rodgers embody the values of the modern UK. Similarly the player base in the Premier League is fantastically diverse. It is a celebration of difference that presents a vision to the world of a UK that is outward looking and international. The league is itself the most international league in the world – 108 of the 736 players selected by the competing national teams at the 2018 World Cup were Premier League players, 38 per cent more than their nearest international rival, Spain's La Liga. The fans come in every shape and size, too: young and old, gay, straight or +. They can be found anywhere in the world, but all are brought together through their love of their club and the sheer joy of the beautiful game.

35. EY (2019) *Premier League: Economic and Social Impact*. Available online at: [https://www.ey.com/Publication/vwLUAssets/EY-Premier-League-economic-and-social-impact-January-2019/\\$FILE/EY-Premier-League-economic-and-social-impact-January-2019.pdf](https://www.ey.com/Publication/vwLUAssets/EY-Premier-League-economic-and-social-impact-January-2019/$FILE/EY-Premier-League-economic-and-social-impact-January-2019.pdf)  
See also: <https://www.premierleague.com/news/981771?sf206482249=1>

Perhaps surprisingly, sports diplomacy has not to date attracted as much attention in the UK as it has in other countries, most notably the USA, though this is changing thanks to the efforts of academics like Simon Rofe at SOAS University of London and the team at Edinburgh University's Academy of Sport. Arguably, the lack of interest from the policy sphere has not been an impediment to the UK's success in sports diplomacy; it may even have been an asset. When it comes to soft power, sometimes the best thing for the state to do is to simply get out of the way. Instrumentalising culture as a tool of foreign policy is a delicate business – it can be done but care must be taken not to undermine the attractiveness of a soft power asset by tainting it through a grubby association with government. Rather than seeking to instrumentalise its considerable sporting and cultural assets, the most useful role of government is as a facilitator and supporter. The successful bid for the 2012 Olympics and the brilliance of the games themselves shows what government can achieve by working as a supportive partner and sponsor. Investment, support and knowing when to step back and trust in others were a hallmark of both the governments of the time and the London mayoralty. Sadly, the ambition and chemistry that brought such success in 2012 has not quite come together again since. Yes, the UK has hosted the rugby and cricket world cups since 2012, but despite repeated bids it has yet to succeed in securing the FIFA World Cup. The government needs to find its Olympic mojo once more and step up to win the race to be the host in 2030. And if, as has been mooted, it was a single bid covering the British Isles as a whole and bringing together all the UK home nations and the Republic of Ireland, rather than another London-centric event, all the better.

Partnerships like the British Council and Premier League's Premier Skills programme show what can be done with a little imagination. Drawing on both the immense attractive power of Premier League clubs and the simple, universal joy of a kickabout, Premier Skills uses the power of football to engage young people around the world in community projects and English language learning. To date, Premier Skills-trained community coaches and referees have reached more than 1.6 million young people in 29 countries. Similar programmes focused on cricket, rugby and other popular sports have provided a powerful platform for reaching out to young people in places as diverse as Pakistan and Brazil to help build connections, attractiveness and trust in the UK.

While it is the finding about the role of sport in driving interest in doing business/trading with the UK that is arguably the single most striking outcome of the analysis, the data also shows the importance of culture in the wider sense to the international appeal of the UK.

The culture and heritage of the UK is the foremost factor people think of when they are asked what is most attractive about the country. It is a prime driver of intentions to visit the UK, and with tourism predicted to be worth £257 billion by 2025 – just under ten per cent of GDP<sup>36</sup> – its importance cannot be underestimated. One of the reasons the City of London has such an edge over its continental competitors is because of the vibrant cultural life of the metropolis: it is simply a far more interesting and exciting place to live and work than Frankfurt or other pretenders to its crown. Of course, its true competition is outside Europe. New York, Shanghai, Mumbai, Tokyo, Singapore and Dubai are also much more interesting places than poor Frankfurt. Investment in the UK's cultural assets, its libraries, museums and galleries, the historic environment and its world-class theatres and festivals is of vital importance to the country's continued success. But it is above all investment in people that matters most, in creating opportunities for artists to develop their craft, to have the space to innovate and create. Too often policymakers focus on the bricks and mortar of grand designs while neglecting the vital infrastructure, such as local and regional theatre companies, that young, talented creatives depend upon to thrive.

The UK's culture is not only a powerful attractor as a consumer product. It's not just about Ed Sheeran or Vivienne Westwood – culture is an expression of the values of the people of the UK and as such intimacy with it is vital to the building of trust and understanding. Sharing the UK's culture with others, and promoting engagement with other cultures, is a non-threatening way to foster the connections and networks that are at the heart of a country's soft power. The UK's culture is a valuable asset and the government and the governments of the devolved administrations have a crucial role in supporting the cultural sector and the agencies, like the British Council, that do so much to share and promote the UK's culture internationally. What is so powerful about the work of the British Council in particular is that it is not focused on narrow self-promotion. The emphasis is on mutuality, on sharing and cultural exchange. In sharing the UK's culture internationally, the British Council also helps support international artists and cultural practitioners to connect with one another and the people of the UK. The British Council's work places the emphasis on mutual benefit to the exchange parties. That British generosity of spirit and respect for the other that is so core to the mission of the British Council is the antithesis of the self-interested approach so evident in the rhetoric of America First. That ethos perhaps explains why the UK is generally seen as more attractive and trustworthy than the USA and other P5 powers.

The UK's top spot in the soft power league tables depends in large part on perceptions of the country as an open, liberal, democratic country that upholds the rules-based international system and acts for the common good. The UK is seen as supporting the political freedoms and other values that the peoples of the world find attractive. Humanitarian interventions, such as the action the UK took to combat Ebola in West African nations, have enhanced the UK's international reputation. As the UK looks to define a new role in the world, there may be merit in offering greater support for multilateral initiatives like UN peacekeeping – additional UK expertise and technical capability would be welcomed on UN humanitarian missions around the world. The Department for International Development (DFID) and the FCO have made laudable advances in the promotion of the rights of women and girls and this work must be maintained. The UK's commitment to the UN's 0.7 per cent target for international development is a powerful symbol of the UK's outward-looking, generous, internationalist approach to the world. DFID's programmes have transformed the lives of millions of the world's most vulnerable people.<sup>37</sup> For example, it reached 32.6 million people, including at least ten million women and girls, with humanitarian assistance between April 2015 and March 2019. Between January 2015 and December 2017 it supported the immunisation of approximately 56.4 million children, saving 990,000 lives. But the benefits of these programmes can be counted not 'only' in the lives they have saved but also in the goodwill and trust they generate for the UK. The UK's influence relative to other leading economies is enhanced as a direct result of the generosity of its aid programme, a factor that has been recognised in the Henry Jackson Society's *Audit of Geopolitical Capability: An Assessment of Twenty Major Powers*.<sup>38</sup> Maintaining – while perhaps also doing more to celebrate – the UK's aid programme will be crucial to the UK's international attractiveness and trustworthiness in the years ahead.

There are reasons the UK is first among equals. Recognising these strengths, in education, sport, culture and international development, will be vital to future success. There is no room for complacency. These areas of strength will require investment and innovation if the UK is to continue to lead the pack. In the areas where the UK is weaker, particularly in perceptions of science and innovation, there is a pressing necessity for the country to raise its game. A 2.4 per cent target for R&D by 2027 is not nearly ambitious enough. There are clear lessons from other leading economies. For the UK to be even a competitor – let alone a leader – in the Fourth Industrial Revolution, there will need to be significant increases in investment in R&D. The mobility of researchers, students and academics is also crucial. The UK needs to adopt an approach to immigration policy that encourages people to visit, study and work in the UK, for example through the development of a flexible, easily navigated visa system for those looking to come to the UK for a temporary period. The restoration of the post-study work route is a very welcome step in the right direction. However, while outstanding questions about the future participation of the UK in Erasmus+ and the successor to Horizon 2020 continue to go unresolved there remains a risk the UK could lose ground to its competitors. The exposure to the values and culture of the UK gained from such lived experience is vital to the country's attractiveness and influence. The UK will also need to invest in its international networks, in the FCO and the British Council. If the UK's international reach declines relative to its competitors, its ability to build trust and exert influence internationally will be undermined. An attractive, connected and trusted UK is only possible if the UK is internationally active and capable.

**An attractive, connected and trusted UK is only possible if the UK is internationally active and capable.**

37. Department for International Development (2019) *Annual Report and Accounts 2018–19*. Available online at: [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/815787/ARA-2019.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/815787/ARA-2019.pdf)

38. James Rogers (2019) *Audit of Geopolitical Capability: An Assessment of Twenty World Powers*. Henry Jackson Society. Available online at: <https://henryjacksonsociety.org/wp-content/uploads/2019/01/HJS-2019-Audit-of-Geopolitical-Capability-Report-web.pdf>

# Conclusion

The UK's position as a 'soft power superpower'<sup>39</sup> is well known. The results from the 2018 perceptions survey of the G20 and the analysis presented above appear to confirm the results of the various polls and rankings of soft power compiled by Portland Communications and other organisations.

However, while these results are to be welcomed, they also reinforce the view that there is no room for complacency on the part of UK policymakers. The difference between first and second or even third place in any one of the qualities metrics that drive attractiveness and trust is often within the margin of error. Yes, the UK compares well against the seven focus countries in this study, but it is very much first among equals. It would take only a very slight shift in perceptions in a couple of qualities for the UK to lose its current edge over its close rivals Germany and Japan.

There is also very clear scope for others to increase their scores. China and especially India can and very likely will improve upon their results. Increasing levels of investment in education, science and technology, international development and other areas by these two rising global powers will certainly pay dividends in the years ahead.

Rightly or wrongly, the UK is already perceived as falling behind its competitors when it comes to science and innovation. Further deterioration in the UK's position in this and other areas would have serious implications for the country's soft power, which would in turn have a significant, negative impact on the UK's economy and international influence.

A country's soft power is not guaranteed, the example of the USA pays testament to that. Having been the pre-eminent leader in both hard and soft power in the late 20th century it has now lost much of the trust of the peoples of the world it once could draw upon – as evidenced by the finding that the US government is now the most distrusted of any of the G20.<sup>40</sup> The USA remains the world's most powerful nation state on most measures, but it is no longer considered especially trustworthy or reliable, at least in comparison to other leading liberal democracies such as Germany, Japan or the UK. It still has many qualities that are viewed as attractive internationally, reflected in the scores for having world-leading universities, science and technology, sports teams, and arts and culture. It is still the world's foremost power, but it is significantly behind on the societal values that are seen as most crucial to trust. In essence, the USA continues to be perceived as having all the 'best stuff', but it is no longer viewed as the paragon for democracy and equality that it was in the 1980s when the peoples of Eastern Europe and others living under the yoke of brutal authoritarian regimes looked to it as the lodestar on their long road to freedom. This is evidenced in the relatively poor results for the USA for 'treats everybody fairly' (50 per cent) and 'is a force for good' (54 per cent).

**There is no room for complacency on the part of UK policymakers.**

39. *Soft power superpowers* (n 2).

40. *Powers of attraction* (n 6).

There is a difference between the soft power of what can be bought – whether it is an Ivy League university degree, an iPhone or a ticket to see Lil Nas X – and the soft power of a country's values and actions. The former are all to a large degree transactional. They are attractive as consumables. And they are absolutely central to decisions about travel, as the enduring popularity of Disney World demonstrates. They may even inspire respect and awe. However, unlike attractiveness, trust especially depends on perceptions of openness, equality, respect and tolerance within a society. What made the Moon landing such a powerful moment in human history was not only the seemingly impossible feat of safely sending a man to walk on that strange silvery surface, it was the way the whole world came together as never before to share that moment and celebrate human progress. Critically, the message wasn't that of the *Requerimiento*, the Moon wasn't claimed in the name of a foreign king or country – no, the message was: 'We came in peace for all mankind'.

The fact that soft power can be lost means UK policymakers must be alive to the challenges posed by both current events and long-term, structural challenges, of which Brexit is the most obvious. The smallest shifts in opinion could very easily reverse the rankings between the top three, while a more significant change in attitudes could see the UK's position move closer to that of the USA, without the advantages of the United States' much larger population, economic size and military power. How the UK reorientates itself following its formal exit from the European Union on 31 January 2020 has the potential to be the sort of disruption that could turn the *status quo* upside down.

The results of the pre- and post-referendum surveys were published in 2017's *From the Outside In*.<sup>41</sup> The surveys revealed the negative impact of the UK's decision to leave the EU on the perceptions of young people in the EU's three other G20 states in terms of trust and attractiveness, and in the qualities that are the drivers of trust. The 2018 survey covered herein and in 2018's *Powers of attraction*<sup>42</sup> subsequently revealed a partial recovery in perceptions of the UK over the intervening period. While that recovery is something to celebrate, it must be owned that between 2016 and 2018 nothing actually changed. The actual lived reality of Brexit could

prove a very different experience, which could have a profound impact on attitudes towards the UK, and not just in Europe. However, if the UK holds true to its values it can navigate a path that not only safeguards its position but also opens up new opportunities to make a reality of the government's plans for 'global Britain'.

The UK's soft power has always depended in large part on perceptions of the UK as an open, free and liberal country that is a benevolent force in the world. It has generally been perceived as acting for the common good rather than out of narrow self-interest, as exemplified by the UK's response to the Ebola outbreak in West Africa, the UK aid programme and the work of the BBC World Service and the British Council. Other states have been willing to give credence to the UK's point of view, to listen to and even follow the UK's lead on key global challenges because it is trusted to act for the common good and recognised as a leading proponent of the rules-based international system. If the UK steps back from that stance it will lose influence and become both less attractive and less deserving of the trust of others. This will have very real costs, for example from falling flows of FDI into the UK.

To maintain its leading position among its close international rivals, the UK needs to be outward looking, open, optimistic, self-assured and internationally engaged. In practical terms this means: an ambitious vision and strategy for UK soft power, backed by sufficient investment; a continued commitment to multilateral co-operation and to spending 0.7 per cent of GDP on international development; and a renewed investment in the diplomatic network. Participation in Erasmus+ and the successor to the Horizon 2020 programme would powerfully demonstrate the UK's openness and commitment to co-operation with its near neighbourhood, and should be at the heart of the UK's new partnership with the EU. The creation of a truly global equivalent to Erasmus that helped build familiarity and positive perceptions of the UK in places like Latin America, Sub-Saharan Africa and South-East Asia that might otherwise look to the USA or China or Japan would be an undeniably powerful signal of the UK's openness to the world at large, and would increase the UK's global connectedness and build the trust on which influence depends.

41. British Council (2017) *From the Outside In*. Available online at: [https://www.britishcouncil.org/sites/default/files/from\\_the\\_outside\\_in.pdf](https://www.britishcouncil.org/sites/default/files/from_the_outside_in.pdf)

42. *Powers of attraction* (n 6).

Aside from Brexit the UK faces another specific challenge: its perceived weakness in science and technology. UK policymakers need to grasp the realities of the Fourth Industrial Revolution and take the necessary steps to ensure it is not left bobbing hopelessly in the wake of other leading powers as they race ahead. R&D investment needs to rise, and to rise significantly higher than the government's currently unambitious – and unmet – targets. Such is the challenge that this may well be the moment for the UK's own NDEA. The UK will also need to be open to the world's brightest researchers, scientists and entrepreneurs. That means introducing a visa system that is not only technically fit for purpose but which also presents a positive, welcoming, friendly environment to those coming to the country for short- and medium-term work and study.

In an age of renewed great state rivalries, the UK is seen as of lesser importance internationally than its fellow P5 powers, China, Russia and the USA. That is something that UK policymakers just need to get over. Instead of nostalgia for a past hegemony that is, frankly, never coming back, the UK should embrace the 21st-century geopolitical reality in which it finds itself. The UK occupies a position close to that of other leading liberal democracies. It is one of a cluster of major economies that hold shared values and an important role in global affairs. Unlike the USA or Russia, it is perceived as a benevolent global player, a force for good, a trusted, respectful and unthreatening partner committed to the rule of law and to the promotion of global peace and prosperity. In a world where soft power can deliver international influence and economic success, that matters.

If the UK lacks the clout of the USA or China, it does have the capability to amplify its voice by working in concert with other likeminded powers. Rather than viewing them as rivals, the UK should align with Germany, Japan and other liberal democracies to realise its strategic goals. The UK should explore any and all opportunities to expand its global networks, to find new forums and mechanisms for working with likeminded allies but also for developing relations with less familiar countries. By working constructively with other states, the UK would be demonstrating the very values that are so central to its international attractiveness and trustworthiness. It is unnecessary to be the biggest or 'baddest' when you can be the better. Being liked and respected has always mattered in international relations. Today it is the key to global success.

By showing solidarity with the peoples of the world through its admirable commitment to international development and support for the rules-based liberal order, and by working constructively with other states to promote freedom and fair play, the UK can and will continue to be a 'soft power superpower'.

**Rather than viewing them as rivals, the UK should align with Germany, Japan and other liberal democracies to realise its strategic goals.**

# Recommendations to UK policymakers

1. To be truly connected, attractive and trusted internationally, the UK government needs to think strategically and plan and invest in the infrastructure that underpins the UK's international influence. At a minimum it should follow the advice of the BFPG and aim to spend at least three per cent of GDP on international engagement expenditure.
2. Similarly, if it is serious about being a world leader in science and technology, the UK government should be aiming to raise investment in R&D to at least three per cent of GDP in the medium term. In the short term it should look to significantly accelerate delivery of its existing plans to raise levels of investment to the EU average.
3. Money alone will not be enough to shift perceptions of the UK's relative standing in terms of science and technology. The government should consider intervening to increase awareness of UK expertise and excellence internationally through better marketing and branding. The government's Innovation is GREAT campaign is a solid start but British science and engineering need their own version of *Vorsprung durch Technik*.
4. The UK needs a friendly environment immigration policy that actively encourages short- and medium-term study and work in the UK; the immersive experience of living and studying/working in a country plays a crucial role in shaping its international appeal. Further, if the UK is to take a leading role in the Fourth Industrial Revolution, it will need to build upon reforms like the reintroduction of the two-year post-study work visa and support the international mobility of researchers, scientists and entrepreneurs, and the global networks and connections on which they depend, for example through continued participation in the Erasmus+ programme and the successor to Horizon 2020.
5. Policymakers need to be alive to the impact of perceptions of the UK on the country's economy and security and act accordingly in the formation of policy and the rhetoric they use. Words and deeds both matter. It is crucial that the UK is seen to be acting in accordance with its values on the international stage. That means advocating for human rights and taking a leading role on global issues like climate change. The UK's hosting of COP26 in 2020 is a very positive example of UK leadership. At the same time, policymakers must also be alive to the fact that the actions and language used in the UK's domestic affairs also impact on global perceptions.
6. There should be more attention paid to the very significant contribution of sport to the UK's international attractiveness, with greater support for programmes like Premier Skills and a committed drive to win the bid to host the World Cup in 2030. There needs to be a much better understanding across government of the essential role of culture and values in the UK's international attractiveness.
7. The UK's commitment to international development plays a very significant role in positive perceptions of the UK. Any step back from the totemic 0.7 per cent target would damage the UK's influence. However, it is arguable that the UK is not getting the credit it deserves for its aid programme, especially from other developed states with notably less generous aid programmes. The diplomatic network could do more to raise the profile of UK aid. Doing so would have a positive impact on perceptions of both the people and government of the UK.
8. A diverse and vibrant cultural sector is crucial to the UK's international attractiveness. The UK needs to invest in the cultural assets that are central to the country's appeal. That means supporting national institutions like the great museums, theatres and galleries in the country's capital cities that attract millions of tourists every year. But it also means investing in the local and regional cultural infrastructure that is essential to the development of the UK's cultural and creative ecosystem. That's investment both in institutions and in the people – the artists, directors, curators and technicians – that are the lifeblood of the sector. To continue to thrive the sector also needs constant exposure to new skills and ideas. This needs to be supported by a visa system which allows creative talent from all over the world to perform and work in the UK, so that the UK can continue to be a hub of creative excellence from all around the globe.

# Appendix

## Note on fieldwork

Commissioned by the British Council, GfK Social and Strategic Research (now part of Ipsos MORI) conducted an online survey across all 19 countries of the G20, interviewing 18–34-year-olds with a minimum of secondary education. The fieldwork was conducted in April 2018. Each country had a sample size of around 1,000. The total sample size of all G20 countries was 19,655, which included a boosted sample for the UK to ensure a balanced representation of the nations and regions. In each market the data is weighted to be representative of the national population by age (18–24 versus 25–34) and gender.

## Notes for tables and figures

References to ‘focus countries’ refer to China, Germany, India, Japan, Russia, the UK and the USA. References to the G20 refer to the 19 member states of the G20 group of nations, unless otherwise stated.

In this report we use the word ‘significant’ in its everyday sense of ‘a result that is important’ and the words ‘statistically significant’ to indicate that the result is likely to be real 95 times out of 100. We have noted where sample sizes are small and therefore most likely not statistically significant.

Below are details of the questions and sample base for the data presented in the various charts included in this report:

### Figures 1–4

Base: All asked about country (approximately 4,300 per focus country, 18,019 rating UK)

1. And taking everything into consideration, how attractive overall do you find each of the countries below?
2. Thinking personally about people, to what extent do you trust people from each of these countries?
3. And now thinking about government, to what extent do you distrust or trust the government from each of these countries?
4. 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?

## Table 1

Base: All who found each country attractive in 2018 (sample size varies from approximately 6,000 for the UK to less than 1,500 for India as it is based on the number of respondents identifying a country as one of the three they view as most attractive)

Which, if any, of the characteristics below particularly contribute to making [country X] attractive to you?

Respondents could choose as many of the characteristics as they liked.

## Figure 5

Base: All asked (approximately 8,400 per focus country)

Thinking specifically about [country X], to what extent do you agree or disagree with the following statements? Chart shows mean score out of 10 where 0 means strongly disagree and 10 means strongly agree. See the glossary on page 50 for a full explanation of the qualities statements.

## Figure 6

This chart presents drivers analysis of the impact of the qualities referred to in Figure 5 on two variables, overall attractiveness and attractiveness as a place to do business. The raw data on attractiveness on which the analysis is based is presented in Figure 11 on page 29 of the report.

## Figure 7

Base: All respondents in G20 countries (N=19,655; respondents not asked about their own country)

This chart presents analysis of the impact of four different forms of lived experience on the 20 qualities statements presented in Figure 5 on page 12.

Please tick any of the following countries that you [have visited/intend to visit]; whose arts and culture you [enjoy/intend to enjoy]; that you [have done/intend to do] business/trade with; that you [have studied in/intend to study in].

## Figure 8 and 9, Table 2

Base: All respondents in G20 countries (N=19,655; respondents not asked about their own country)

These charts bring together the data first presented in Figure 5 and Figure 7.

**Figure 10**

Base: All respondents (N=19,655; respondents not asked about their own country)

Please tick any of the following countries that you [have visited/intend to visit]; whose arts and culture you [enjoy/intend to enjoy]; that you [have done/intend to do] business/trade with; that you [have studied in/intend to study in].

**Figure 11**

Base: All respondents (N=19,655; respondents not asked about their own country)

Which three of the following countries do you find most attractive ... as a place to study; as a source of arts and culture; as a place to do business/trade; and as a place to visit as a tourist.

Respondents were presented with a list of the 19 member states of the G20 group, minus their own country.

**Tables 3–6**

Base: All respondents in G20 countries (approximately 8,400 per comparator country)

These charts present the findings of a key enhancement analysis (Shapley values) that examined how the 20 qualities statements affect intentions to visit, study, do business and engage with the arts and culture of each of the focus countries, as detailed above.

The tables give a percentile value for the contribution of each quality on intentions to engage with the focus countries across the four dimensions.

**Figures 12, 14 and 15**

These scatter charts plot two variables against one another:

12. Is a force for good versus is a global power.
14. Plays a more important role in the world than five years ago versus is a global power.
15. Plays a more important role in the world than five years ago versus is a force for good.

**Figure 13**

Base: All respondents (N=19,655; respondents not asked about their own country)

And how, if at all, do you think the role that each of these countries play in the world has changed in the past five years?

Respondents were presented with four options: plays a MORE important role than five years ago, no difference, plays a LESS important role than five years ago and don't know.

**Figure 16**

Base: All respondents (N=19,655; respondents not asked about their own country)

And now thinking about your own country, how well do you believe it supports and encourages the values that you think are important in the 21st century?

**Table 7**

This table shows the correlations between the 20 individual qualities statements and demonstrates that all contribute to a country's image.

# Glossary of full qualities statements

**World-leading universities**

[Country X] has world-leading universities and academic research.

**World-leading arts and culture**

[Country X] has world-leading arts and cultural institutions and attractions (e.g. theatres, museums and galleries).

**Fosters creativity**

[Country X] education system fosters creativity and innovation.

**World-leading sports**

[Country X] has world-leading sports teams and events.

**Good public services**

[Country X] has good public services.

**Global power**

[Country X] is a global power.

**Respects the rule of law**

[Country X] respects the rule of law.

**Values individual liberty**

[Country X] values individual liberty.

**Strong NGOs**

[Country X] has strong non-governmental institutions (for example, voluntary and charitable organisations).

**World-leading science and tech**

[Country X] is at the cutting edge of science and technology.

**Free justice system**

[Country X] has a free and fair justice system.

**Free press and media**

[Country X] has a free press and media.

**Values diversity**

People from [Country X] value diversity and cultural difference.

**Respects different faiths**

[Country X] demonstrates respect and tolerance for those with different faiths and beliefs.

**Treats everybody fairly**

[Country X's] government treats everybody who lives in the country fairly.

**Open and welcoming**

People from [Country X] are open and welcoming.

**Works constructively**

[Country X's] government works constructively with other governments around the world.

**Democratic society**

[Country X] is a strong example of a democratic society.

**Force for good**

[Country X] is a force for good in the world.

**Aids development**

[Country X's] government contributes its fair share to aiding development in poorer countries.

Note that when respondents were asked about these statements the references to 'Country X' or 'Country X's' were replaced with a specifically named country, e.g. *Russia has world-leading universities and academic research.*



## **Acknowledgements**

**Editor:** Alasdair Donaldson

**Series Editor:** Mona Lotten

**We would like to thank the following people for their contributions to this report:**

Alex Bogdan, Bridget Williams, Gemma Waring and Marloes Klop from Ipsos MORI.

Kathryn Washburn, Gareth Royle and Michelle Crane from the British Council.

ISBN 978-0-86355-957-0

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The British Council is the United Kingdom's international organisation for cultural relations and educational opportunities.

