



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

Global Perceptions 2025



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Foreword



The world is becoming increasingly fractious, polarised, and dangerous. One in seven people experienced conflict in the past year. There's a growing clash of values and deepening disagreement over how societies should be governed and how people should live. Disinformation is spreading rapidly, threatening democracy and undermining the very concept of truth.

These dynamics echo those present when the British Council was founded in 1934, but today's context is more complex. It is shaped by intense geopolitical competition, technological disruption, and profound cultural shifts.

The British Council's new report, *Global Perceptions 2025*, offers timely insights into this fast-changing world. By exploring young people's views of the G20 nations – the world's major economic powers – the report reveals how the next generation perceives global leadership, trust, and influence. It paints a picture of which states are respected – and why – and highlights the values and concerns that will shape how young people engage with the world in the years ahead.

These perceptions matter. They influence personal choices – like where to study, where to build a business, or which partnerships to pursue. But they also shape the choices of governments, businesses, and international organisations. Whether negotiating trade deals, collaborating on climate action, or sharing intelligence, trust is the foundation of international cooperation. Without it, commitments falter and progress stalls.

Global Perceptions 2025 is more than a snapshot of opinion – it's a strategic lens into the future. Understanding how young people view the world is essential for anyone seeking to build influence, foster collaboration, or navigate the complexities of global engagement. In a time of uncertainty, these insights offer a compass for those striving to build a more connected, trusted, and resilient world.

Scott McDonald
Chief Executive

Key findings

The top three countries for overall attractiveness

Country	Rank	Change in Rating (% points) since 2023
Japan	1 ↑	-1 ↓
Italy	2 ↓	-5 ↓
UK	3 ↓	-6 ↓

The top three countries for trust in government

Country	Rank	Change in Rating (% points) since 2023
UK	1 ↑	+1
Japan	2 ↑	+5
Canada	3 ↓	-3

The Asian Century has arrived – the highest climbers for overall attractiveness 2016-2025

Country	Change in Rating (% points) since 2016
Republic of Korea	+19
Kingdom of Saudi Arabia	+17
Türkiye	+15
China	+13
Indonesia	+11

The top three countries for trust in people

Country	Rank	Change in Rating (% points) since 2023
Japan	1 ↑	0
UK	2	-1
Italy	3 ↑	+2

Young people’s top three values that countries around the world should be promoting in 2025

Value	Percentage
Equality	38%
Peace	36%
Freedom	33%

The findings from multiple metrics suggest that in an increasingly unstable, multipolar world, there is a growing preference among young people for predictability, security, and capability – qualities increasingly associated with non-Western governance models – over the perceived instability, paralysis and polarisation of many Western democracies.

Why Global Perceptions matter

In a world defined by competition, fragmentation, and flux, soft power – the ability to influence through attraction rather than coercion – is no longer a luxury. It's a strategic imperative.

The UK has long benefitted from a strong soft power position. But the latest data from Global Perceptions 2025 shows that this advantage is slipping. While the UK remains attractive and trusted, its relative standing among G20 nations is under pressure. This poses a direct challenge to its international influence, long-term security, and economic prosperity.

Crucially, soft power is no longer the preserve of a few traditional powers. Emerging players are actively vying to become the next “soft power superpower.” The competition is intensifying – and the field is levelling. In this new race, complacency is costly. If the UK is to maintain its edge, it must act decisively, strategically, and with purpose.

To shape the future, you must understand the people who will inherit it. Global Perceptions 2025 offers a window into how young people across the G20 view the world – and why that matters. Public opinion shapes policy, even in authoritarian contexts. Where dissent is dangerous, sentiment still matters. That's why regimes work so hard to block access to global media and deter international NGOs. They fear ‘dangerous ideas’ – like democracy and human rights – taking root in the population and threatening their hold on power.

Perceptions shape behaviour. We see this in our everyday choices – Coke or Pepsi, Arsenal or Liverpool, Bali or Barcelona. These choices are determined by our perceptions of trust and attractiveness. The same dynamics apply at the international level. The decisions of businesses, governments, and institutions are shaped in the same way. What's more they are heavily influenced by people's views. By understanding the views of global publics, we gain insight into what drives the decisions of states and other international actors.

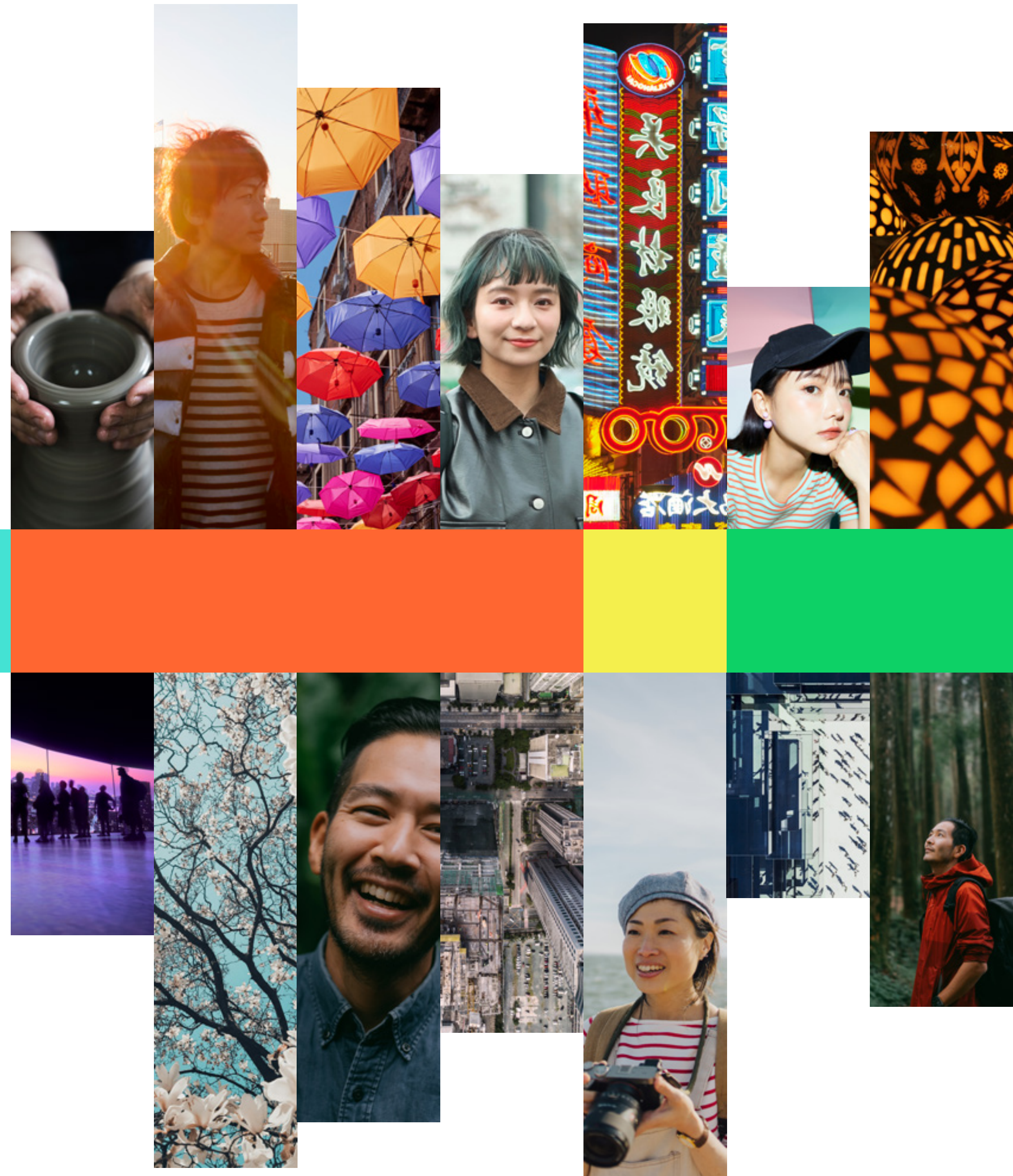
In today's world, influence is earned – not assumed. Tracking and understanding the market you are operating in, and perceptions of ‘the brand’, is as important in statecraft as it is in commerce. If the UK wants to remain a leading global actor, it must invest in listening, learning, and adapting. Only by understanding the audience, can it effectively engage and influence. And only through strategic investment in the programmes, networks, and relationships that build familiarity, trust, and attractiveness can the UK thrive in this new multipolar era.

1

Attractiveness

和を以て貴しとなす
“Harmony is to be valued above all”

Japanese proverb with its origins in the Seventeen-Article Constitution written by Prince Shōtoku in the early 7th century.

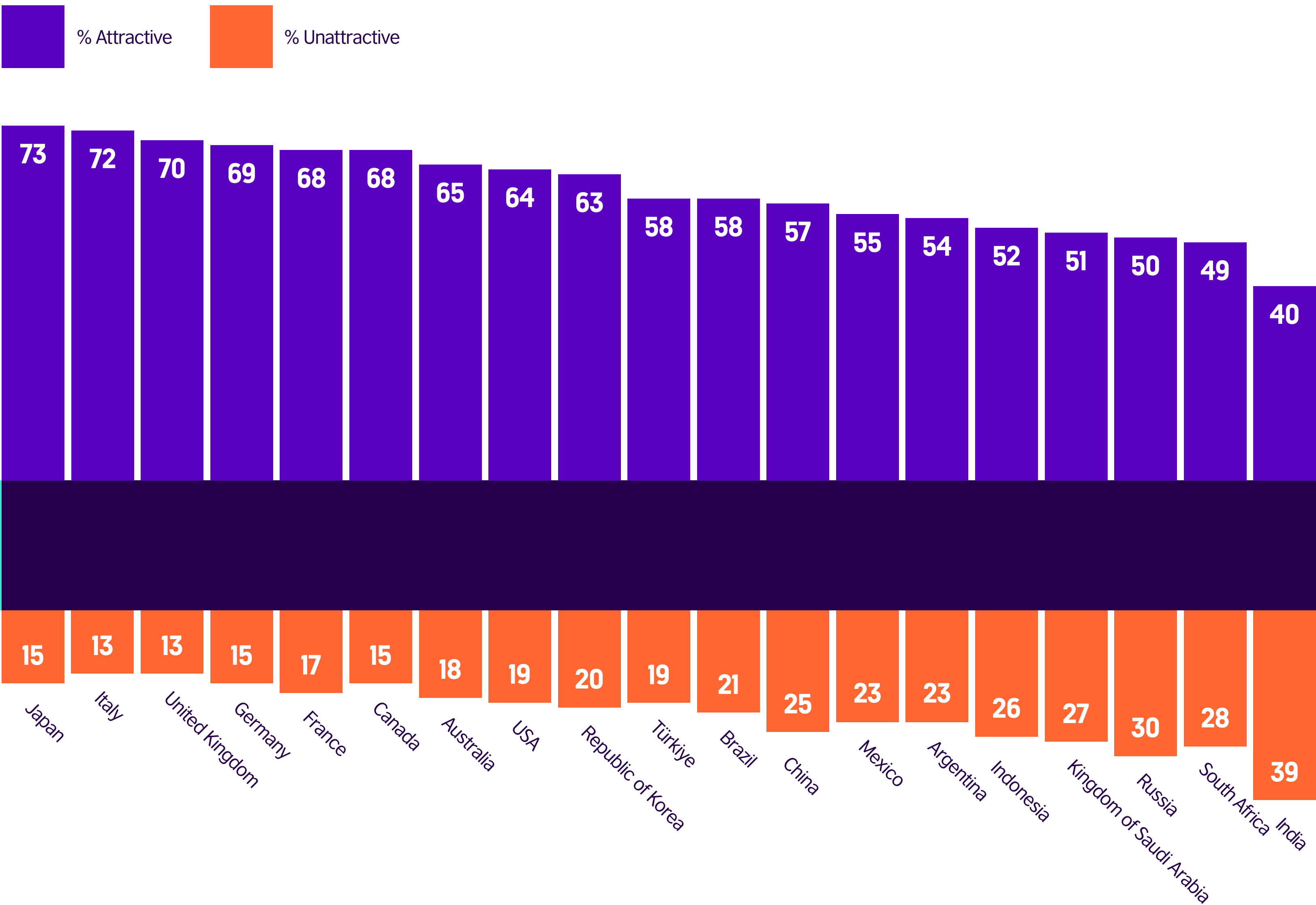


Young people from across the G20 rated Japan as the most attractive country. However, Japan’s rating is actually down one point on 2023. It has taken the top spot because Italy and the UK have seen more substantial reductions in their ratings, in the UK’s case a significant six point fall.

While Australia and the Euro-Atlantic G20 states have all seen reductions in their ratings, East Asian states have performed well. China is up nine points on 2023, while Republic of Korea has seen a four point rise. Republic of Korea’s rating is nineteen points higher than it was in 2016.

In previous waves there was a sharply defined gap between the eight states with the highest ratings and the rest. Even in 2023 there was a twelve point gap between eighth and ninth place. This has almost completely disappeared as the ratings of Australia and Euro-Atlantic states decline and the rest of the world rises. We are witnessing increasingly tight competition in this new multipolar era.

Overall Attractiveness 2025



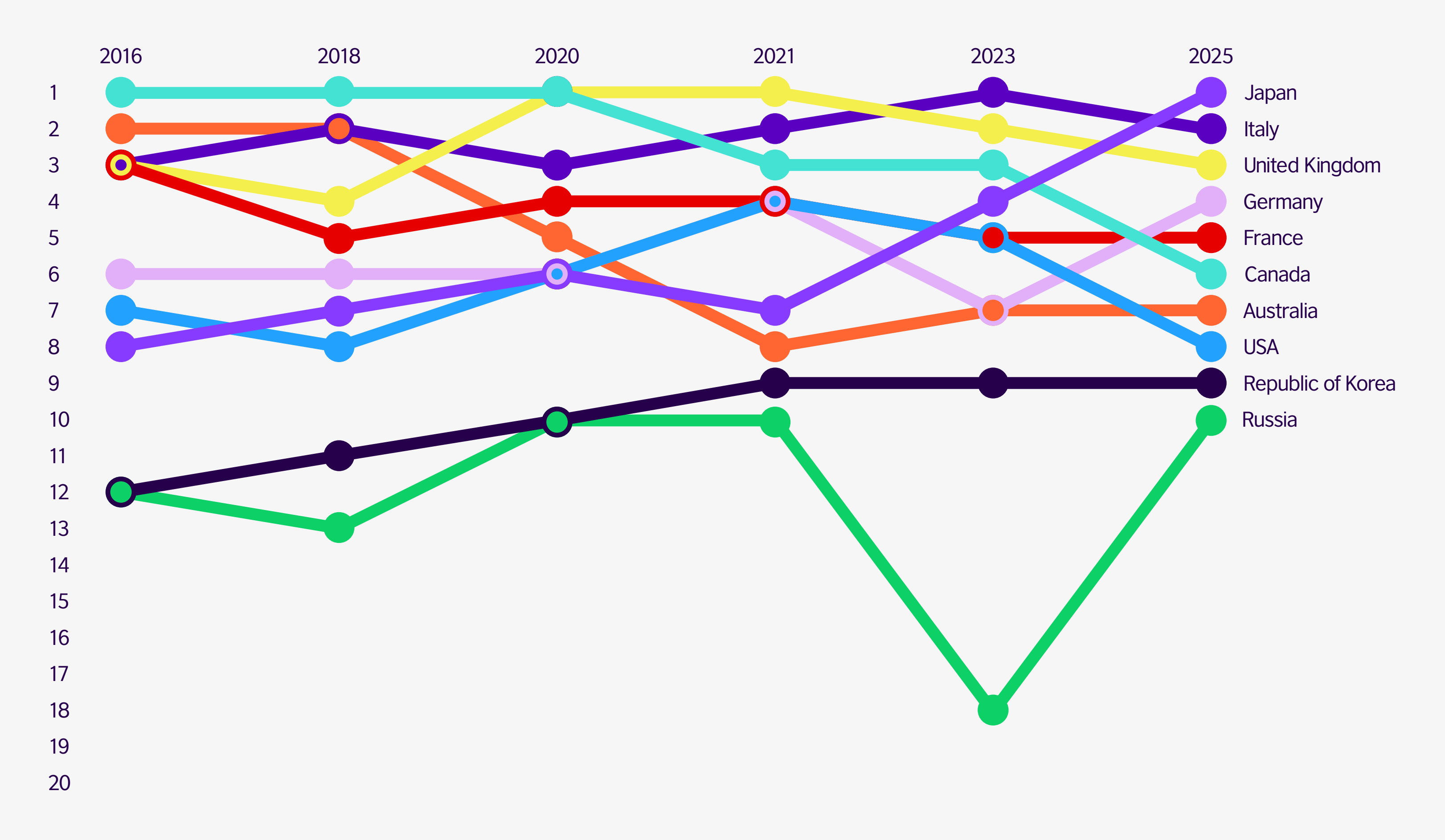
Taking everything into consideration, how attractive overall do you find each of the countries below?

Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n=20,957).
Participants were not asked about their own country.

The top ten for overall attractiveness has long been dominated by rich, liberal, democratic capitalist states. The UK, Japan, and Italy have consistently held leading positions over the past decade. But that dominance is no longer assured: Australia, Canada, and the United States have all seen their rankings decline over time, with the risk that one or more may soon fall out of the top ten.

One of the most striking reversals is Russia. After plunging to eighteenth place in 2023 following its full-scale invasion of Ukraine, it has rebounded to tenth in 2025. While this rebound reflects a clear shift in global perceptions, it does not imply a softening of international concern over the invasion, which continues to shape reputational dynamics in complex and contested ways.

Changing attractiveness rankings: the top ten rated G20 states 2016-2025



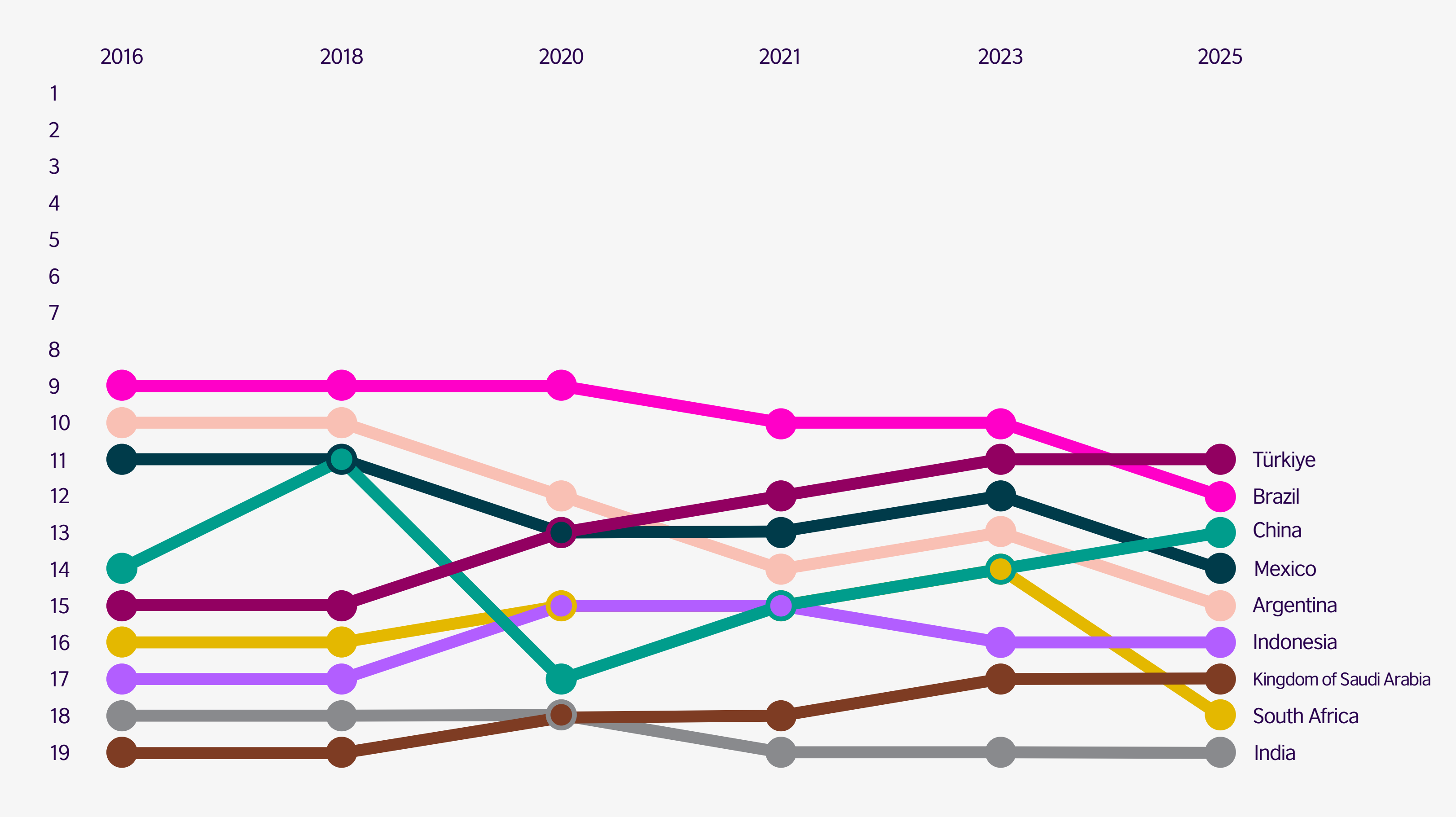
Taking everything into consideration, how attractive overall do you find each of the countries below?

Base: Those who live in countries participating in the G20, excluding Russia, n= c19,000- 21,000. Participants were not asked about their own country.

G20 states in the Global South continue to trail their Global North counterparts in overall attractiveness – but the gap is narrowing, and the pace of convergence is accelerating. While the rankings have remained relatively stable over time, two standout trajectories are reshaping the landscape. China’s rating fell sharply during the COVID-19 pandemic but has since recovered steadily. Türkiye, meanwhile, has shown consistent gains across the past decade. If current trends hold, one or both are likely to follow Republic of Korea in breaking into the top ten.

While there appears only limited movement in the rankings, this conceals the broader trend: across multiple metrics, the ratings of states across the Global South are steadily improving – ‘the rest’ are catching up on the West.

Changing attractiveness rankings: the Global South 2016-2025



Taking everything into consideration, how attractive overall do you find each of the countries below?

Base: Those who live in countries participating in the G20, excluding Russia, n= c19,000- 21,000. Participants were not asked about their own country.

With the exception of black swan events like COVID-19, shifts in attractiveness ratings between successive waves of Global Perceptions tend to be modest. But over the past decade, several long-term trends have emerged. Republic of Korea’s 19-point rise is a standout, while Kingdom of Saudi Arabia, Türkiye, and China have also posted commanding gains.

Meanwhile, the decline in ratings for Australia, Canada, and some other Western states – though less dramatic – signals a broader convergence. The gap between Global North and Global South is narrowing.

Consider this: in 2016, the USA led China by 24 points. Today, that gap is just six. If current trends persist, parity is imminent. The question is whether we’re approaching a new equilibrium – with near-equal ratings across major G20 states – or entering an Asian Century in which East Asian powers surpass their Western counterparts.

Change over time 2016 vs 2025 ratings for overall attractiveness

Country	2016 (% Attractive 6-10)	2025 (% Attractive 6-10)	Change in Rating (% points) since 2016
Japan	66	73	+7
Italy	71	72	+1
United Kingdom	72	70	-2
Germany	68	69	+1
France	72	68	-4
Canada	74	68	-6
Australia	73	65	-8
USA	68	64	-4
Republic of Korea	44	63	+19
Türkiye	43	58	+15
Brazil	53	58	+5
China	44	57	+13
Mexico	45	55	+10
Argentina	50	54	+4
Indonesia	41	52	+11
Kingdom of Saudi Arabia	34	51	+17
Russia	44	50	+6
South Africa	42	49	+7
India	41	40	-1

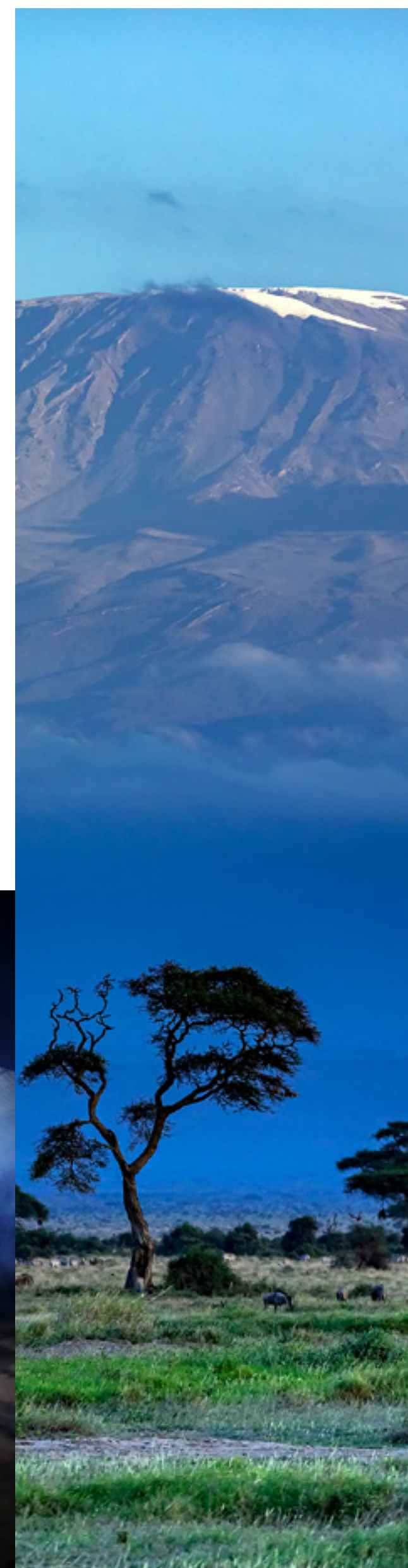
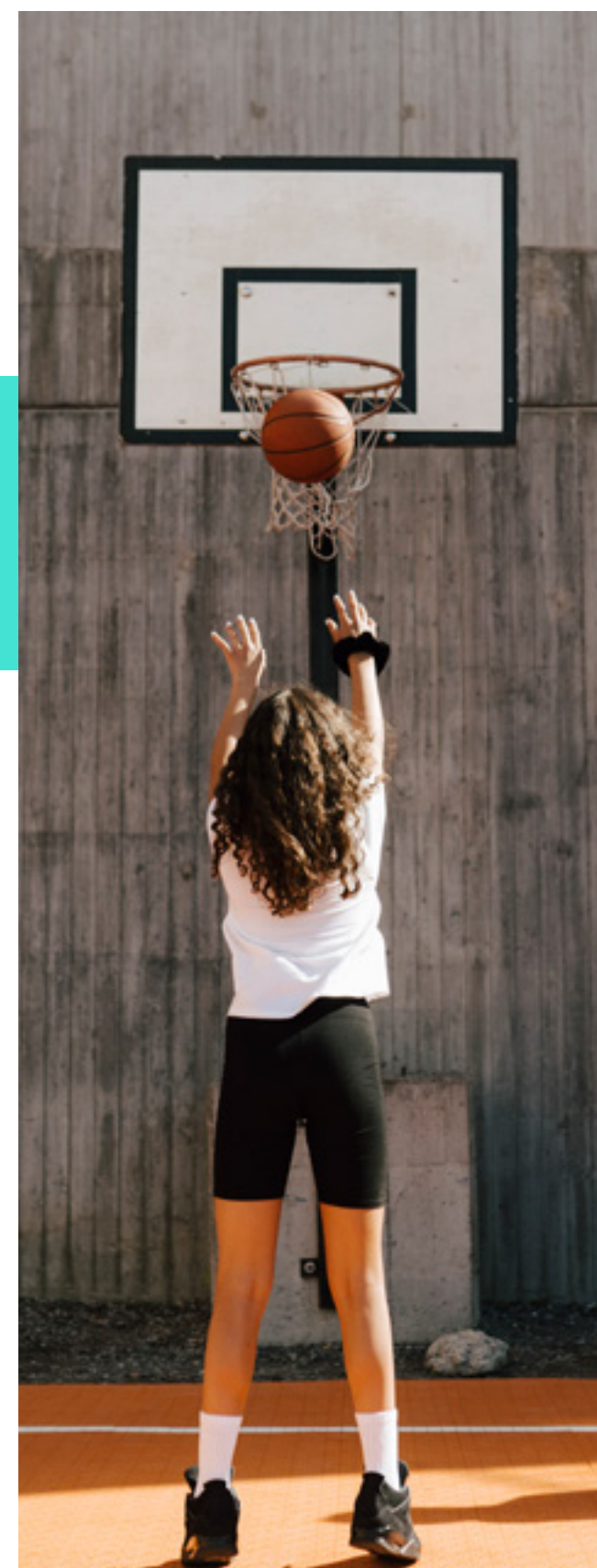
Taking everything into consideration, how attractive overall do you find each of the countries below?

Base: Those who live in countries participating in the G20, excluding Russia, 2016 pre (n=19,540), 2025 (n=20,957). Participants were not asked about their own country.

A complex array of factors underpins perceptions of ‘overall attractiveness’. In this section, we focus on five key dimensions: education, arts and culture, business/trade, tourism, and – for the first time in Global Perceptions – sport. These areas correlate strongly with overall attractiveness scores and help explain the rise of Japan, Republic of Korea, and China, all of which perform well across the board.

The United States presents a striking contrast. It performs far better across these individual domains than it does for overall attractiveness – a reflection, perhaps, of the tension between its enduring cultural appeal and the impact of its international policies and fractious political economy. The US is uniquely exposed: high levels of global interest and media scrutiny make it far more familiar than most countries. Familiarity is a prerequisite for soft power – but, as Chaucer observed in *The Canterbury Tales*, “over-greet hoomly-nesse engendreth dispreisyng.” [familiarity breeds contempt]

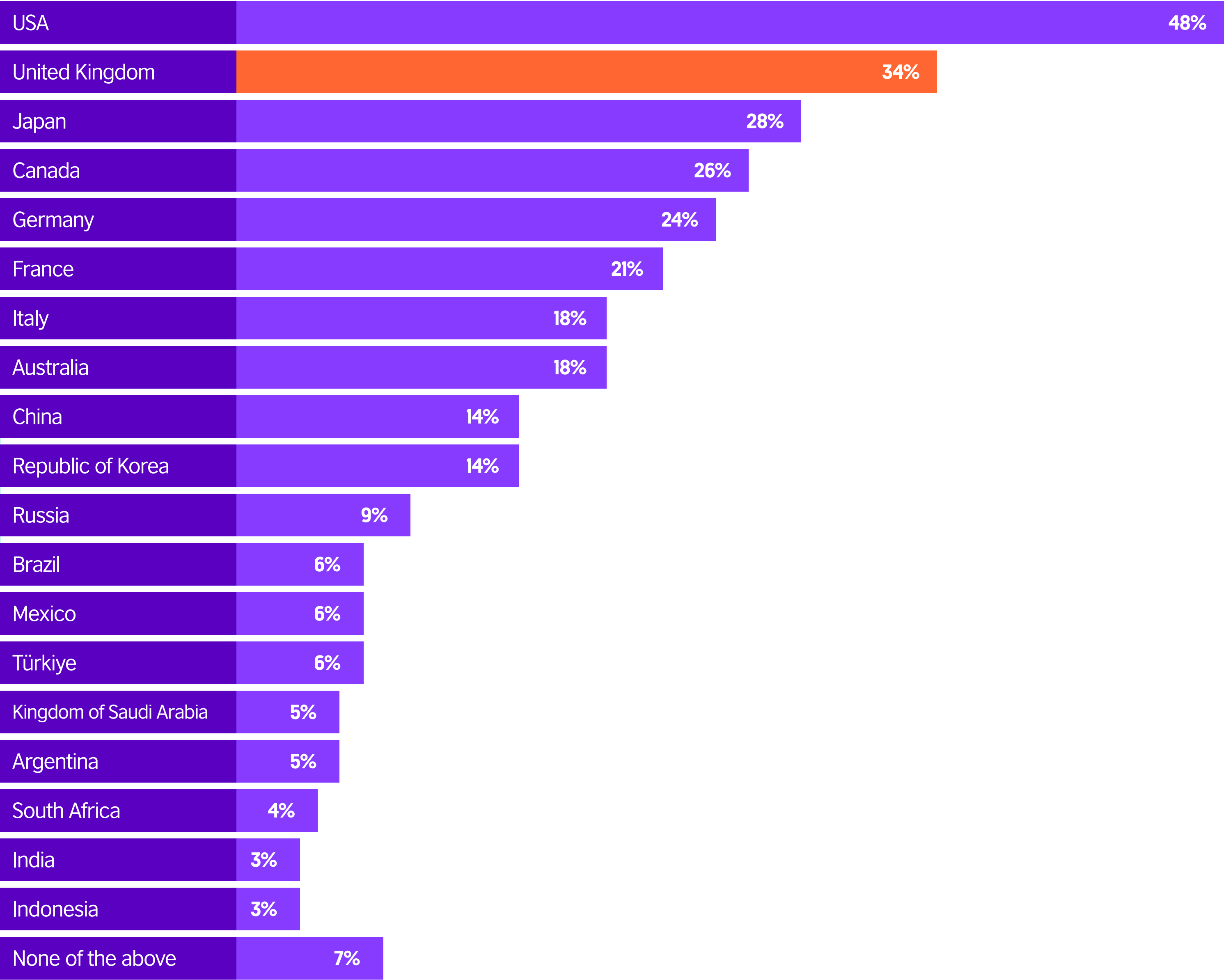
Domains of Attractiveness



Attractiveness
as a place to study

Which THREE of the following countries do you find MOST attractive
as a country in which to study?

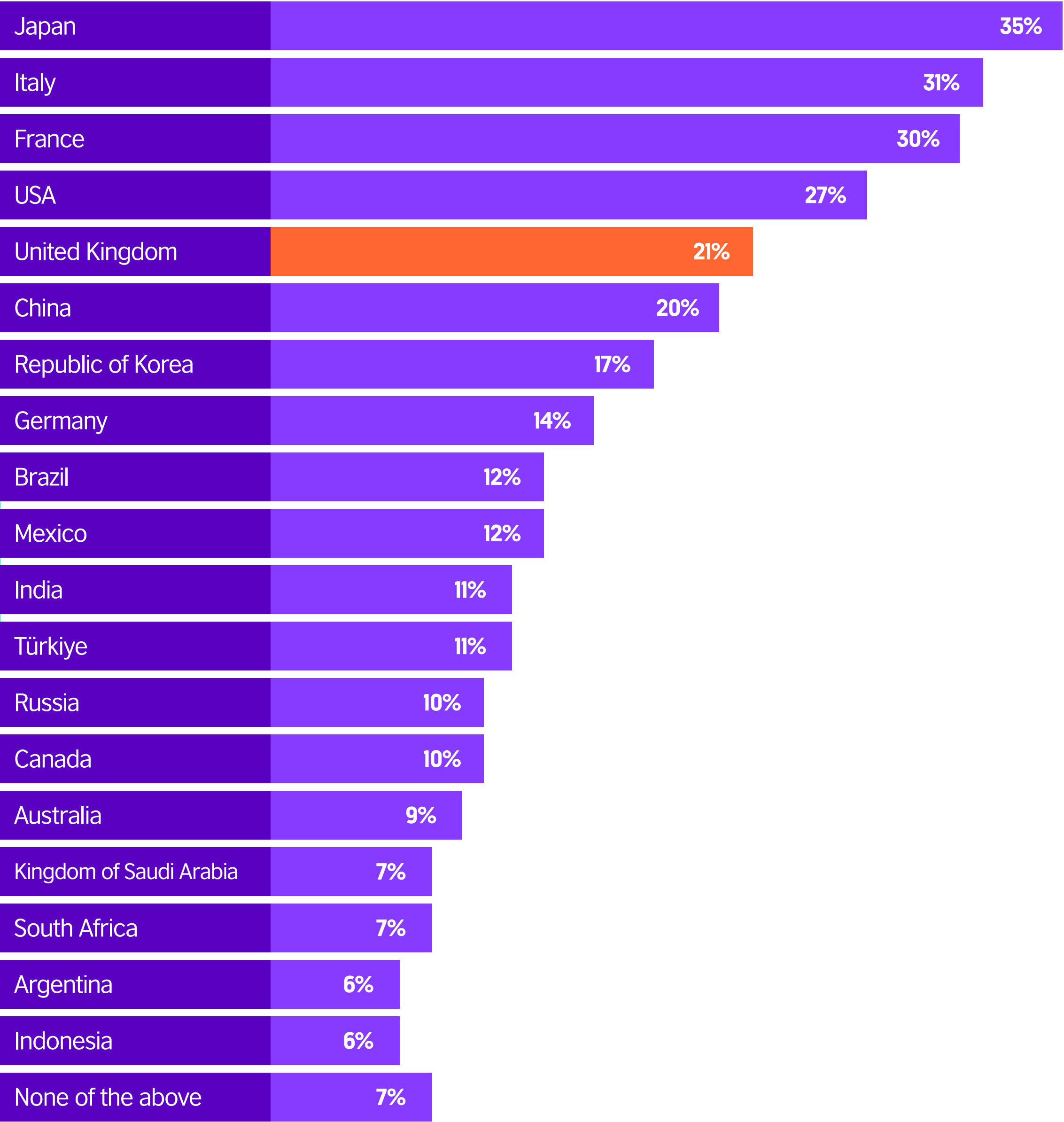
Base: Those who live in countries participating in the G20, excluding Russia,
2025 (n=20,957). Participants were not asked about their own country.



Attractiveness as a source of arts and culture

Which THREE of the following countries do you find MOST attractive as a source of arts and culture?

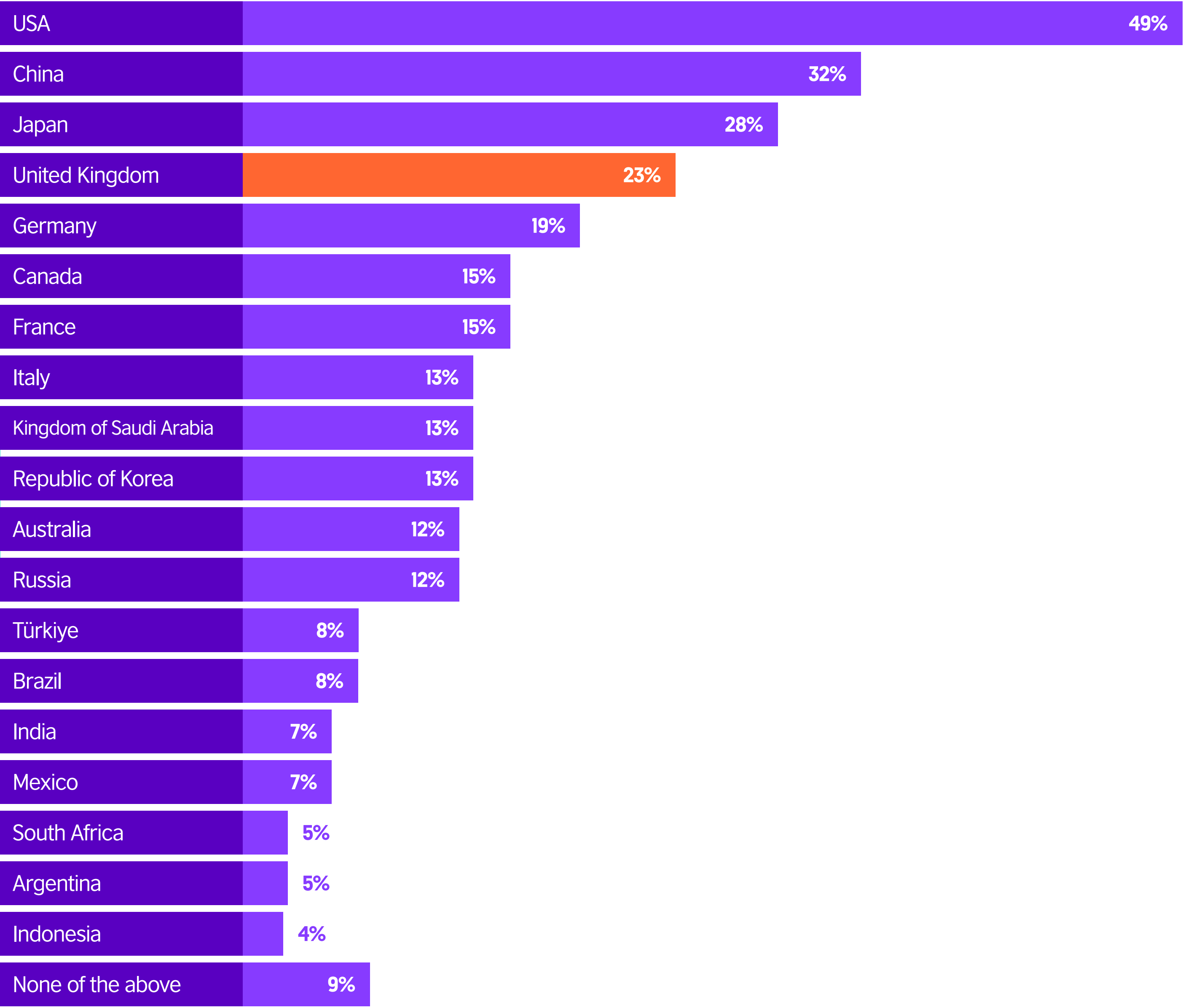
Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n=20,957). Participants were not asked about their own country.



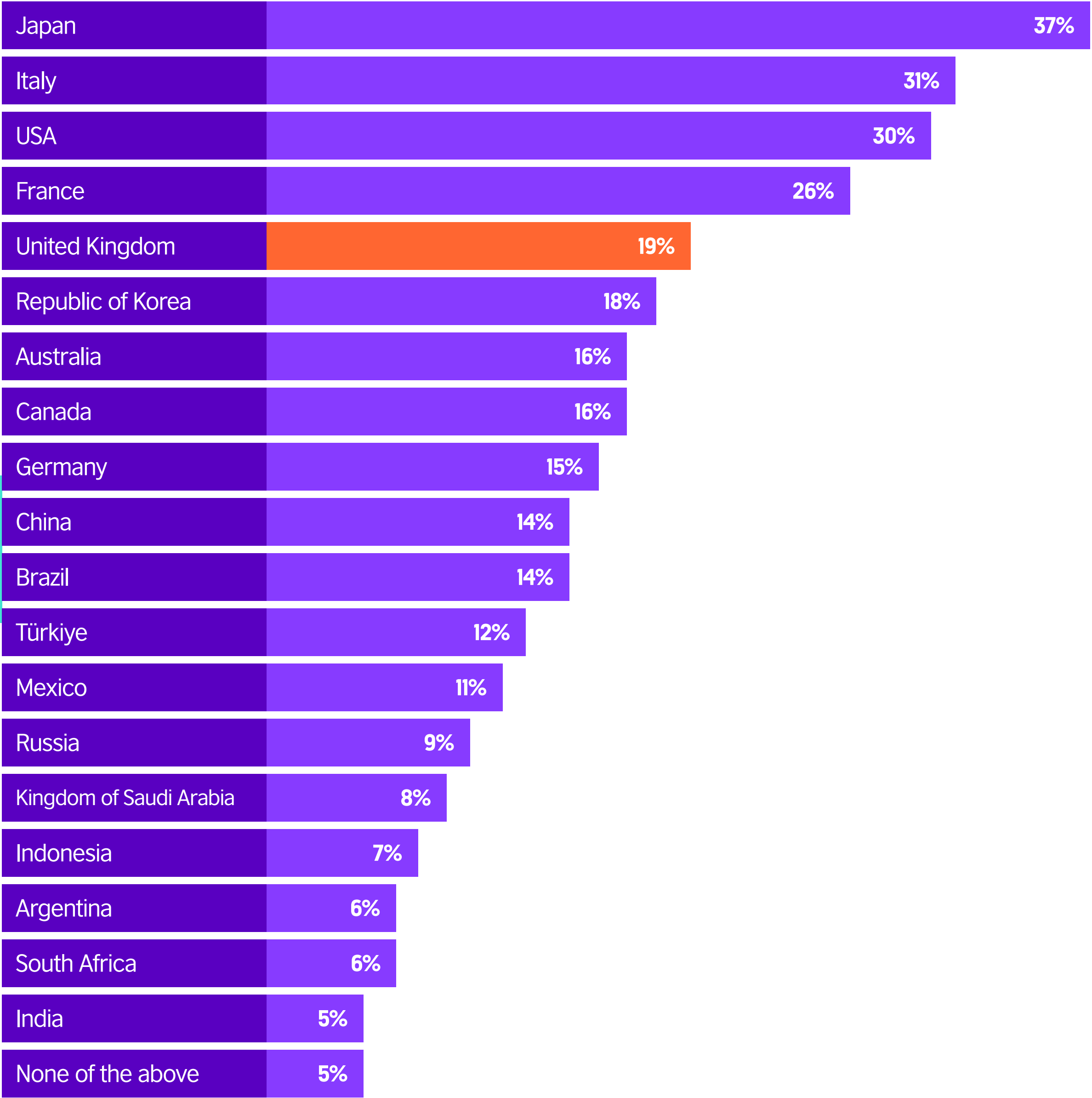
Attractiveness as a place to do business or trade

Which THREE of the following countries do you find MOST attractive as a country in which to do business or trade?

Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n=20,957). Participants were not asked about their own country.



Attractiveness as a place to visit as a tourist



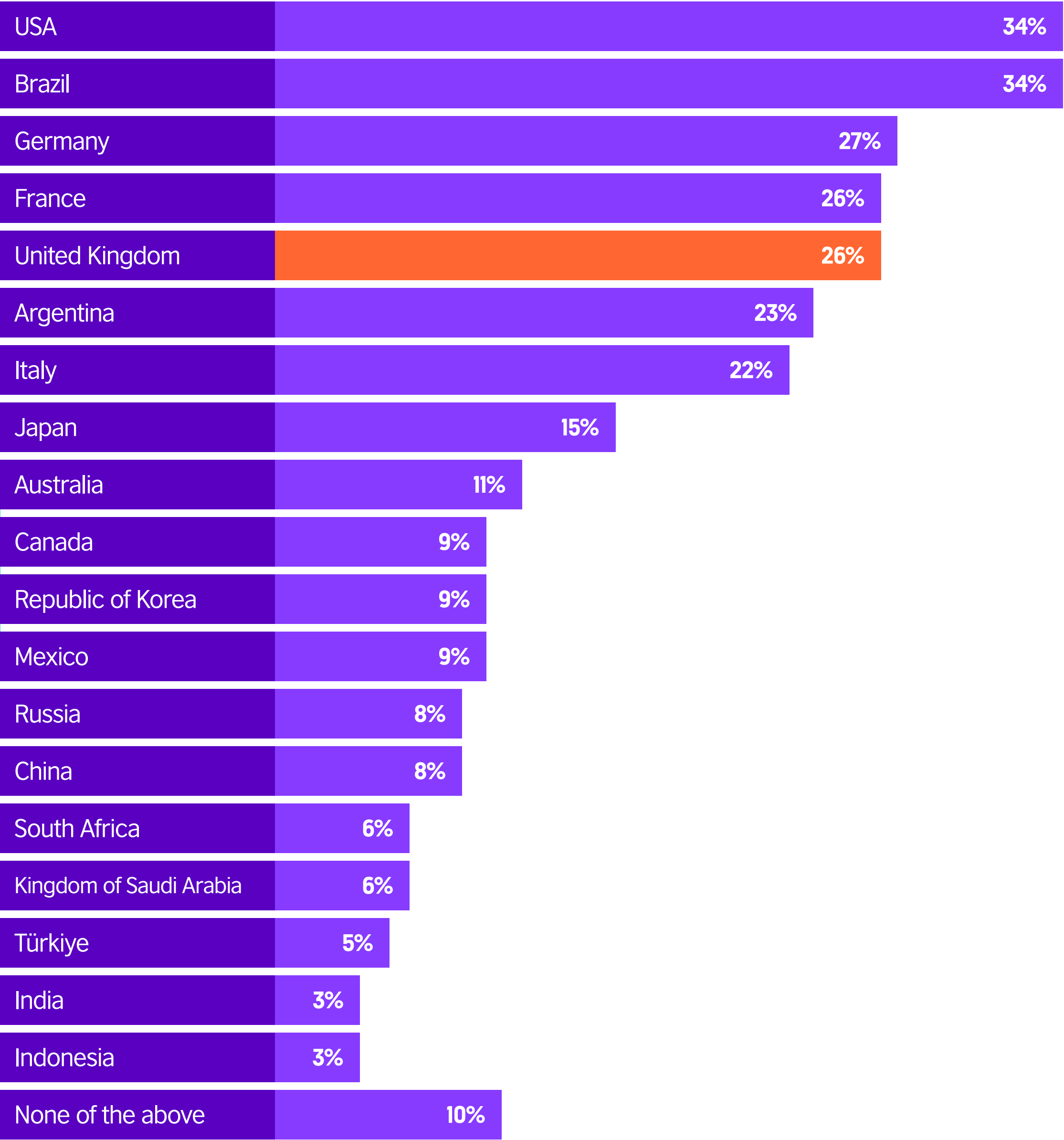
Which THREE of the following countries do you find most attractive as a country to visit as a tourist?

Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n=20,957). Participants were not asked about their own country.

Attractiveness for it’s sports teams, clubs and events

Which THREE of the following countries do you find MOST attractive as a country for its sports teams, clubs and events?

Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n=20,957). Participants were not asked about their own country.



Just as there has been a decline over time in the ratings for overall attractiveness for leading liberal, capitalist economies, so to have the ratings across the ‘domains of attractiveness’ eroded. Amongst the top five most highly rated states only Japan has shown any progress, with significant increases in attractiveness as a place to visit and as a source of arts and culture.

These indicators should be a source of concern for policymakers as declining attractiveness adversely impacts on what people actually choose to do – whether it’s where they go on holiday, where they study, and where they invest and spend their money.

Study				Arts and culture			
Country	2016 (% Attractive 6-10)	2025 (% Attractive 6-10)	Change in Rating (% points) since 2016	Country	2016 (% Attractive 6-10)	2025 (% Attractive 6-10)	Change in Rating (% points) since 2016
USA	55%	48%	-7	Japan	25%	35%	+10
UK	42%	34%	-8	Italy	36%	31%	-5
Japan	20%	28%	+8	France	39%	30%	-9
Canada	28%	26%	-2	USA	29%	27%	-2
Germany	27%	24%	-3	UK	27%	21%	-6

Declining levels of attractiveness amongst leading Western states – change over time 2016-2025

Business / trade				Visit			
Country	2016 (% Attractive 6-10)	2025 (% Attractive 6-10)	Change in Rating (% points) since 2016	Country	2016 (% Attractive 6-10)	2025 (% Attractive 6-10)	Change in Rating (% points) since 2016
USA	51%	49%	-2	Japan	25%	37%	+12
China	30%	32%	+2	Italy	31%	31%	0
Japan	29%	28%	-1	USA	34%	30%	-4
UK	24%	23%	-1	France	30%	26%	-4
Germany	22%	19%	-3	UK	23%	19%	-4

Which THREE of the following countries do you find MOST attractive as a country in which to study; as a source of arts and culture; in which to do business or trade; to visit as a tourist?

Base: Those who live in countries participating in the G20, excluding Russia, 2016 (n=19,540), 2025 (n=20,957). Participants were not asked about their own country.

Trust

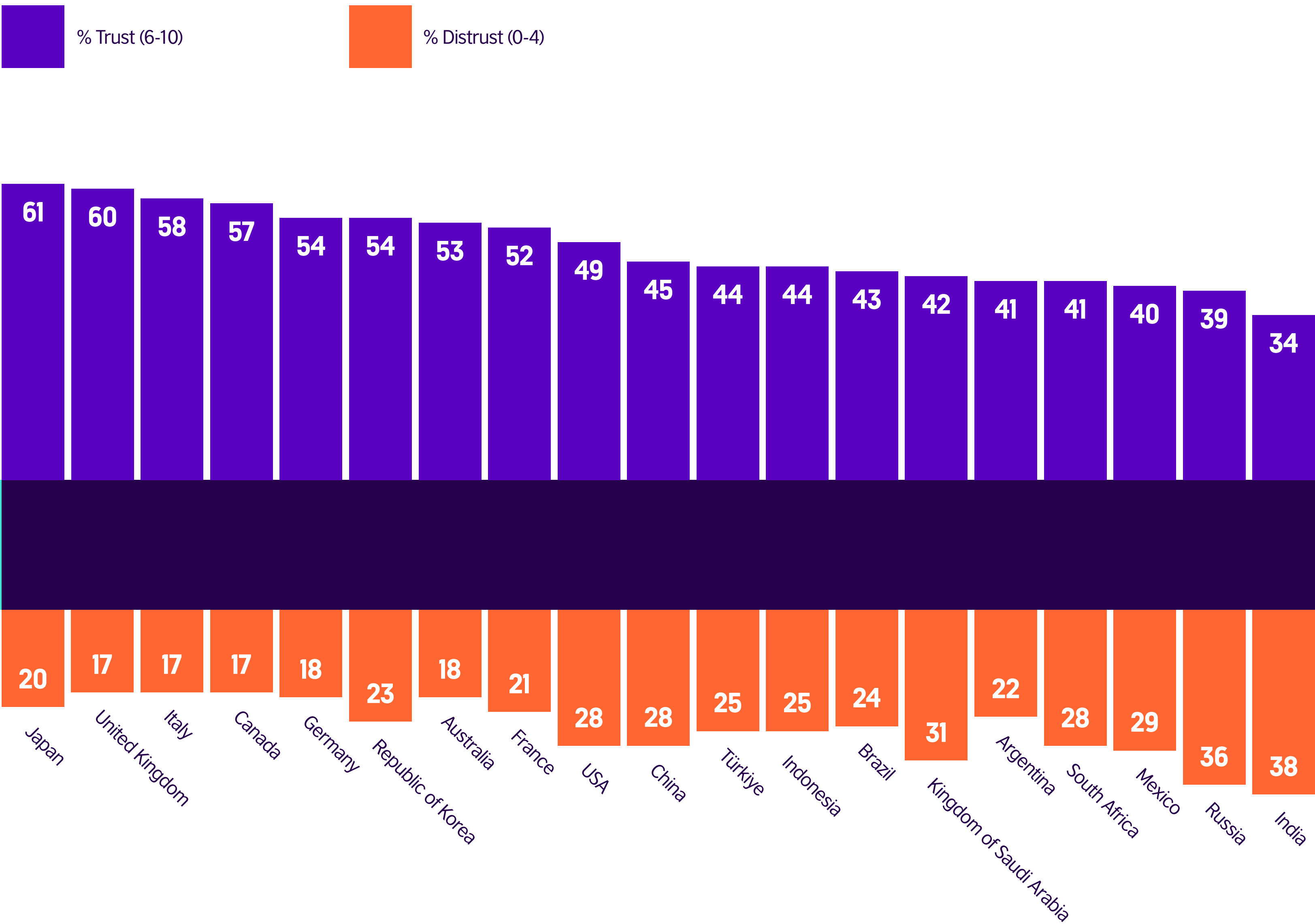
人无信不立, 国无信不稳。
**“Without trust, a person cannot stand;
 without credibility, a nation cannot be steady.”**

Modern Chinese proverb inspired by Confucius, Analects 12.7



Young people from across the G20 rate Japanese people the most trustworthy, just ahead of the British and Italians. As predicted in 2023, Republic of Korea has now overtaken France in the rankings, but in addition it has also surpassed Australia and the United States. The other striking feature is the closeness of the ratings of the USA and China. The USA is down five points on 2023 while China's rating has risen a staggering twelve points. We are again seeing a levelling of the playing field, with the ratings for Euro-Atlantic states stable or declining while those of other states, especially East Asian states like China and Indonesia, rising sharply.

Trust in people



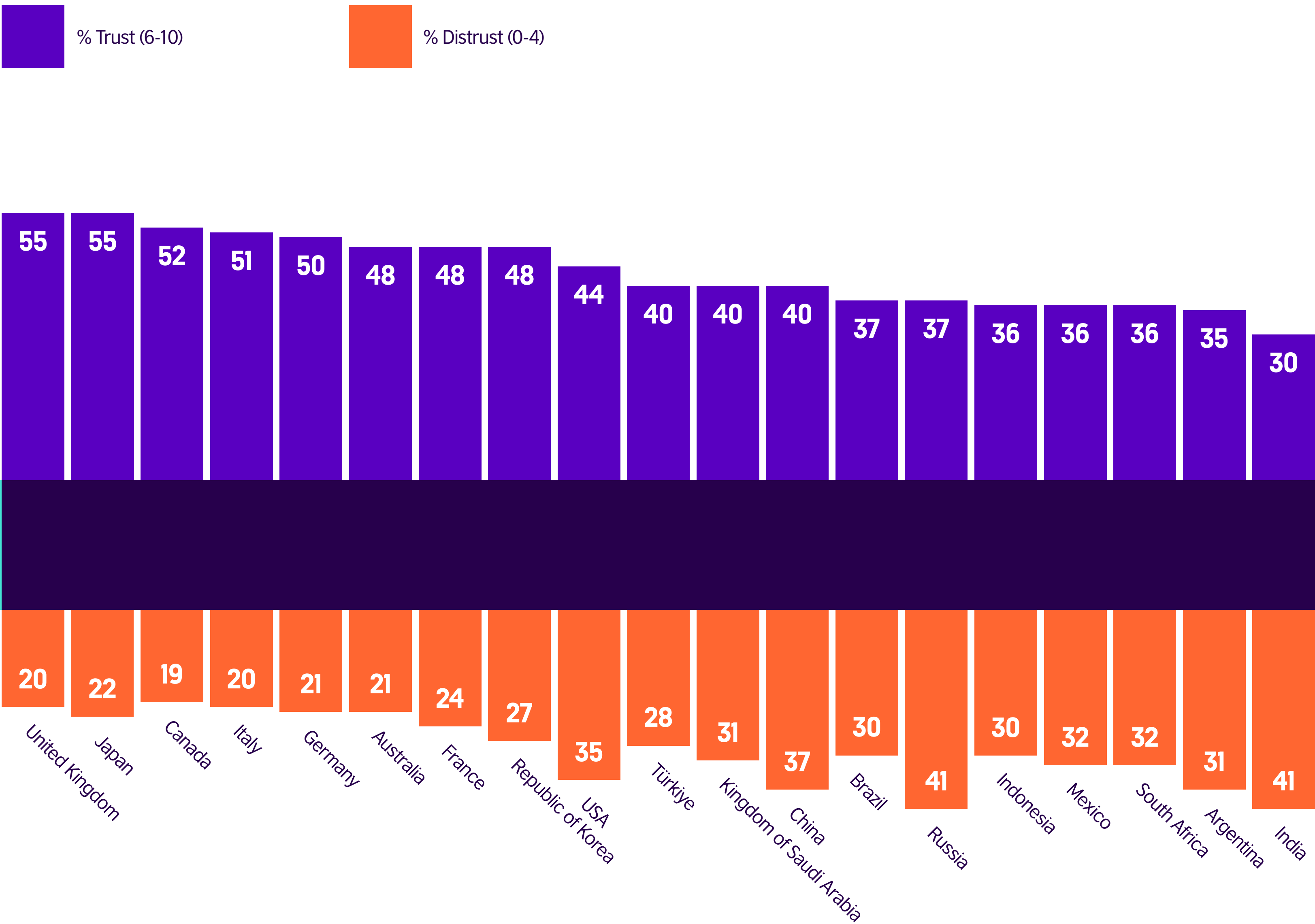
Thinking generally about people/government/institutions, to what extent do you distrust or trust the people/government/institutions from each of these countries?

Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n= 17,654). Participants were not asked about their own country.

His Majesty’s Government is the most trusted in the G20. The UK’s rating is marginally higher than 2023 with a one point increase. Canada, which has led on this metric in all previous waves has seen its rating fall further with a three point drop on 2023. Back in 2016 Canada’s rating was 61%, while the UK’s was 55%. However, while something to celebrate, there is no room for complacency as on current trends it is probable that Japan will surpass the UK in the very next wave of the study having increased it’s rating by five points since 2023.

The data also underscores the convergence between the United States and China. While the US rating dipped slightly, China’s trust score surged by an unprecedented fifteen points. This rise appears to reflect both a general improvement and sharper gains in specific markets, a pattern explored in more detail later in the report.

Trust in Government



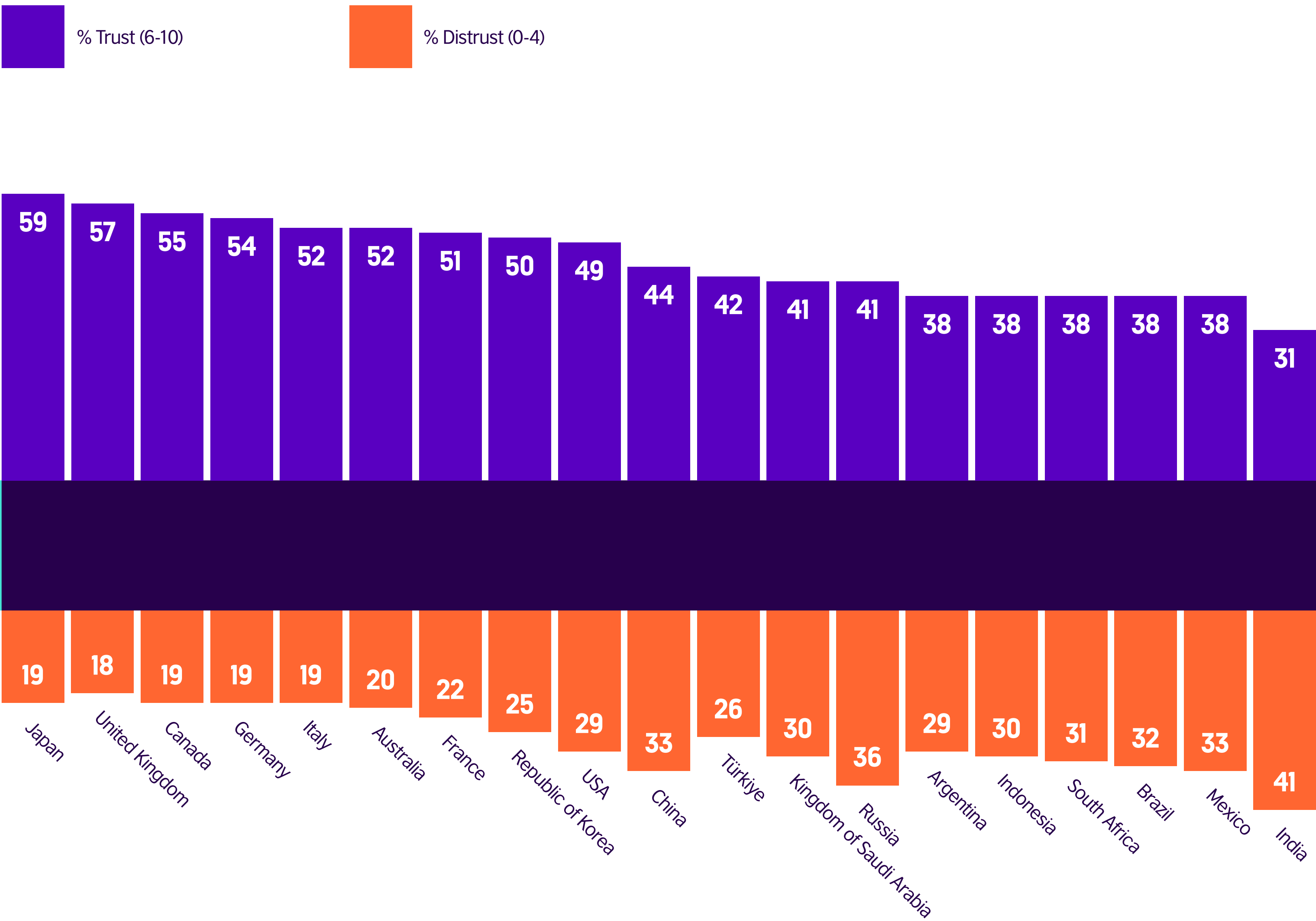
Thinking generally about people/government/institutions, to what extent do you distrust or trust the people/government/institutions from each of these countries?

Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n= 17,654). Participants were not asked about their own country.

Japan’s institutions – including the media, police, and justice system – are now the most trusted in the G20, followed closely by the UK, Canada, and Germany. Japan’s rise is mirrored by surging ratings for Republic of Korea and China, with Republic of Korea up six points and China gaining fourteen since 2023.

Perhaps surprisingly, in this new multipolar world, trust appears to be rising. Many Global South countries have seen gains of five to ten points since 2023 across all three trust metrics. It may be that growing parity between states is leading to increasing trust between peoples. Contrary to commentators’ expectations, instead of multipolarity leading to a colder, more transactional world order, the data suggests something more complex – a reordering that may, in fact, warrant greater optimism.

Trust in institutions



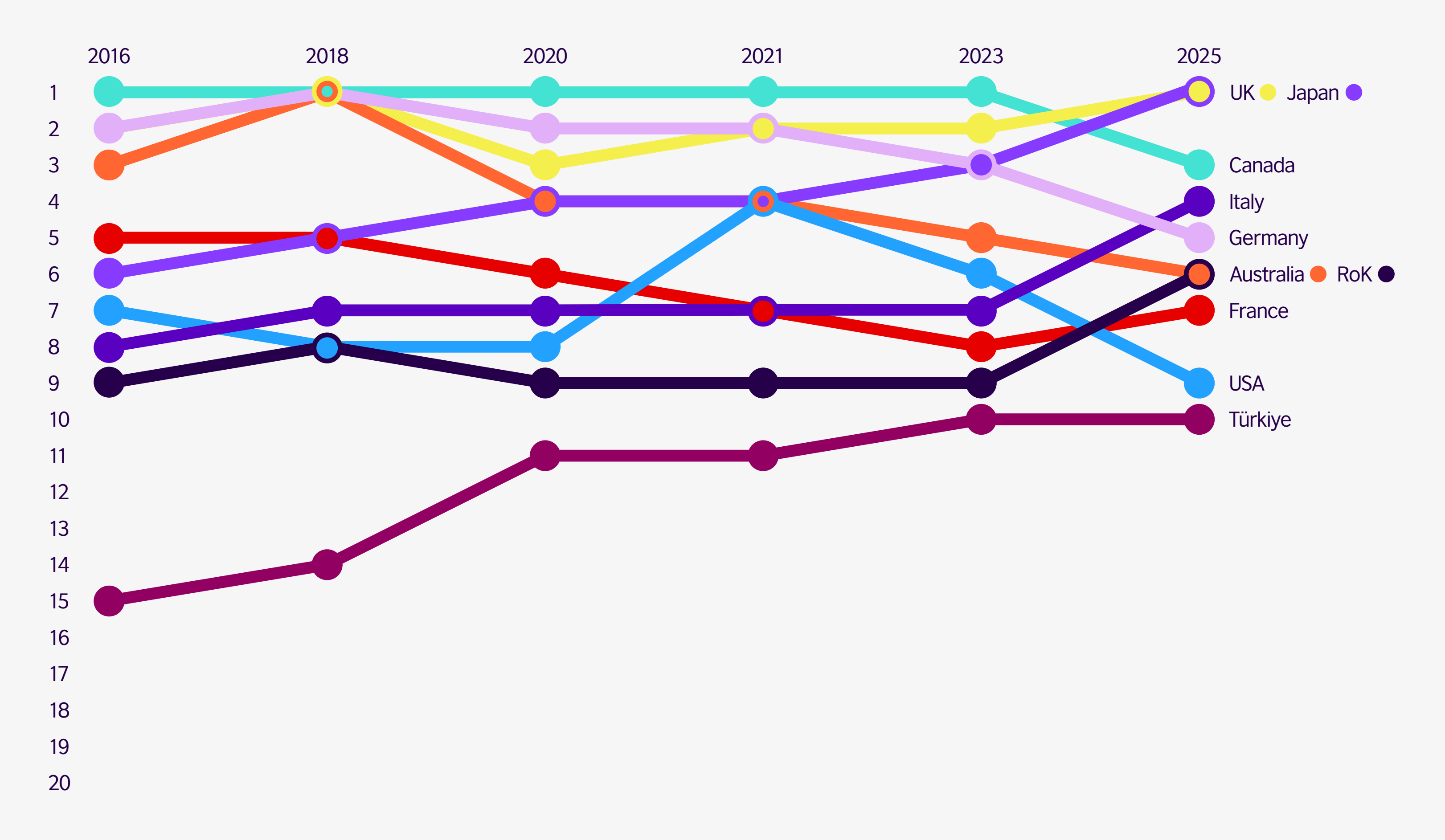
Thinking generally about people/government/institutions, to what extent do you distrust or trust the people/government/institutions from each of these countries?

Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n= 17,654). Participants were not asked about their own country.

The top rankings – and crucially, the ratings – for trust in government have remained relatively stable over time. Japan’s long-term rise in confidence and respect is clearly visible in the data. Türkiye shows a similar upward trajectory.

In contrast, the United States has experienced notable volatility. The USA’s ranking peaked under President Biden and dropped sharply during both Trump presidencies. However, it’s important to note that the actual decline in the US rating between 2023 and 2025 is just two points. The fall in rank is driven not by a collapse in trust, but by rising scores in Italy, France, and Republic of Korea.

Changing trust in government ratings: the top ten 2016-2025

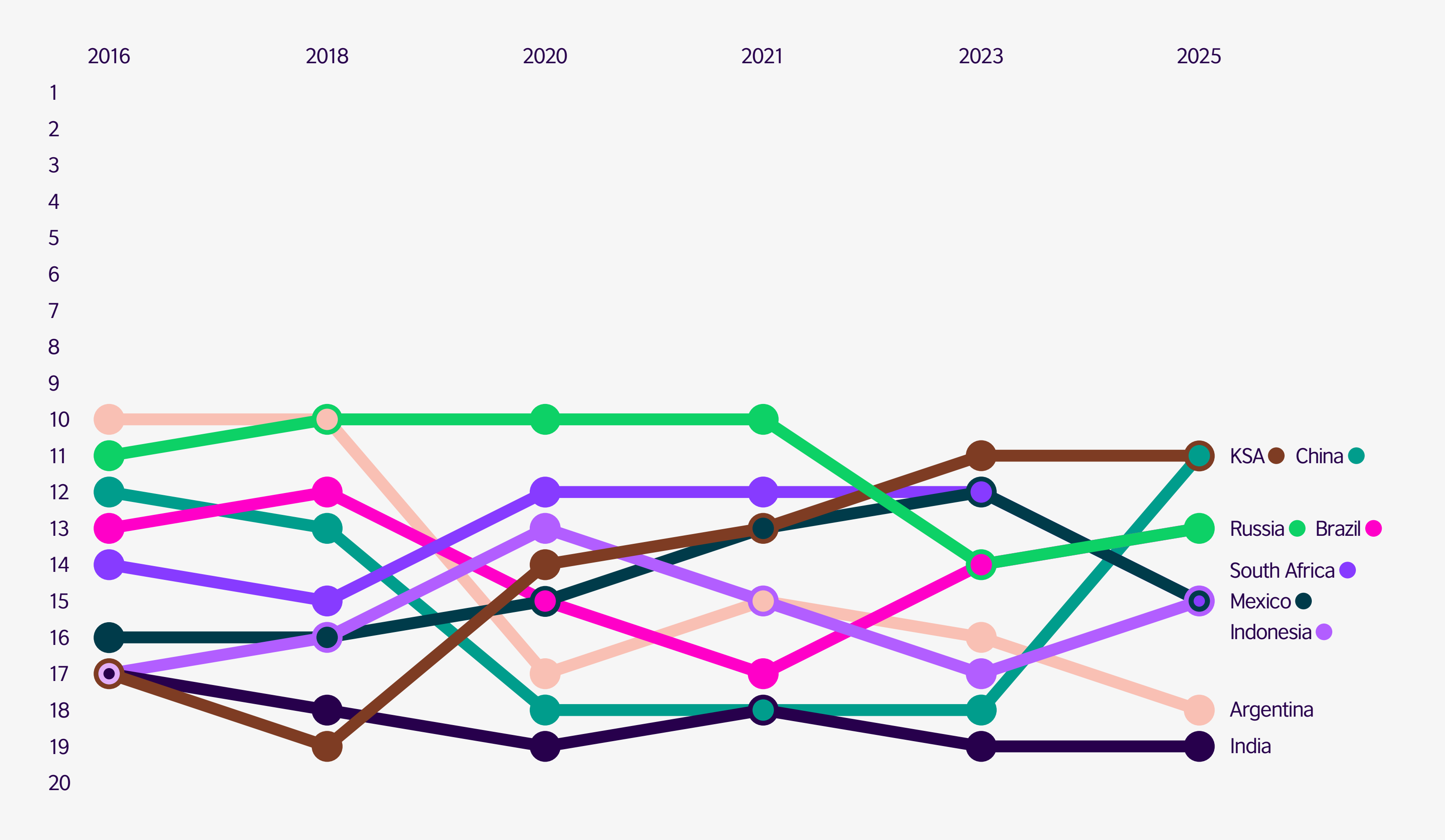


Thinking generally about government, to what extent do you distrust or trust the government from each of these countries?

Base: Those who live in countries participating in the G20, excluding Russia, 2016 pre (n=19,540), 2025(n=20,957). Participants were not asked about their own country.

There has been greater volatility in the lower tiers of trust in government rankings, driven in large part by China’s fluctuating ratings. Kingdom of Saudi Arabia’s steady ascent continues to reshape the landscape, displacing several other countries in the process. Beneath the headline rankings, there has been significant movement in the ratings of states in the Global South: China has surged by fifteen points, and most others have gained between five and ten. This has compressed the gap between first and nineteenth place by eight points – further compelling evidence of rising multipolarity. The West’s longstanding position of privilege is being increasingly challenged as ‘the rest’ closes in.

Changing trust in government rankings: the lower rankings 2016-2025



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

Base: Those who live in countries participating in the G20, excluding Russia, 2016 pre (n=19,540), 2025(n=20,957). Participants were not asked about their own country.

The long-term shifts in trust in government ratings reveal a clear levelling of the international playing field. The UK stands out as the only country to have consistently maintained its position over time. Canada, once the most trusted government in the G20, has experienced a marked decline. Yet most states in the upper rankings have shown a degree of resilience comparable to the UK's.

The ascent of East Asian states is evident in the ratings trajectory, though the most dramatic rise – a sixteen-point surge – belongs to Kingdom of Saudi Arabia. The data suggests we may be approaching a watershed moment: one in which the United States long seen as the Leader of the Free World, risks being overtaken by one or more authoritarian states. Other Western democracies also appear vulnerable, with several trending towards parity with ‘the rest’.

Changes in the ratings for trust in government 2016-2025

Country	2016 (% Trust 6-10)	2025 (% Trust 6-10)	Change in Rating (% points) since 2016
United Kingdom	57	55	-2
Japan	49	55	+6
Canada	62	52	-10
Italy	44	51	+7
Germany	55	50	-5
Australia	55	48	-7
France	51	48	-3
Republic of Korea	34	48	+14
USA	49	44	-5
Türkiye	26	40	+14
Kingdom of Saudi Arabia	24	40	+16
China	29	40	+11
Brazil	29	37	+8
Russia	31	37	+6
Indonesia	24	36	+12
Mexico	25	36	+11
South Africa	27	36	+9
Argentina	32	35	+3
India	24	30	+6

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

Base: Those who live in countries participating in the G20, excluding Russia, 2016 pre (n=17,280), 2025 (n=17,654). Participants were not asked about their own country.

China’s ratings have risen markedly compared to the results recorded in 2023. This is reflected in the significantly improved G20 average ratings we’ve been focusing on so far – but these scores don’t tell the whole story. While young people in many countries now rate China more positively, some of the most striking changes are in specific states.

It’s reasonable to expect improvements within the BRICS, given the increasingly close and ambitious cooperation between China and its expanding membership. And indeed, favourability has risen considerably in these countries. However, even more notable are the unprecedented increases in China’s ratings in several Western states. For example, trust in government ratings for China are up between 12 and 27 points in Euro-Atlantic countries – in many cases more than doubling the results from just two years ago.

China’s Surge

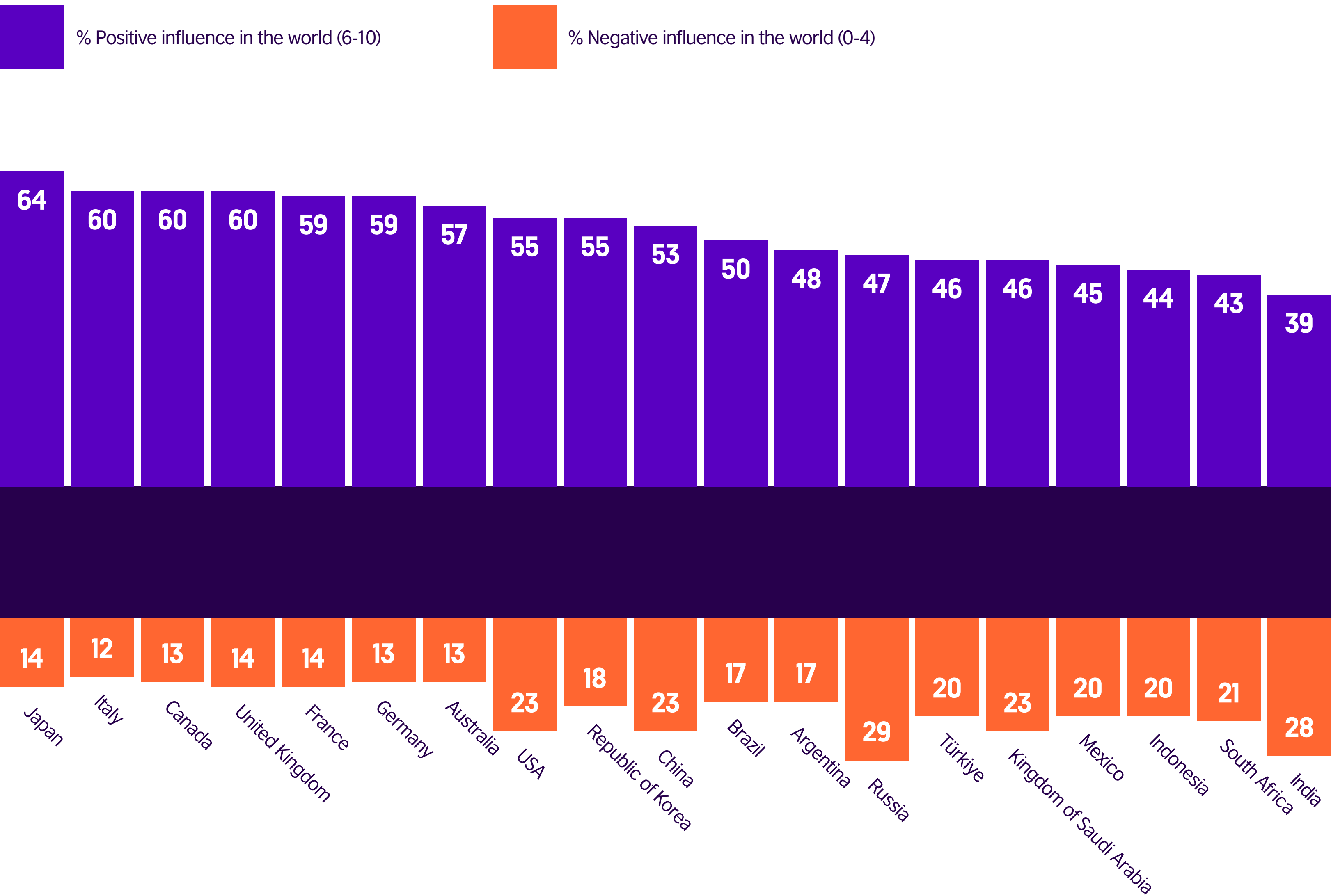
Country	2016 (% Trust 6-10)	2025 (% Trust 6-10)	Change in Rating (% points) since 2016
Kingdom of Saudi Arabia	52	59	+7
South Africa	46	57	+11
Indonesia	44	55	+11
Brazil	31	51	+20
India	30	47	+17
Mexico	29	45	+16
Türkiye	27	42	+15
USA	19	41	+22
United Kingdom	20	41	+21
Germany	14	41	+27
Canada	18	35	+17
Italy	22	34	+12
Argentina	19	33	+14
France	15	32	+17
Australia	21	31	+10
Republic of Korea	9	14	+5
Japan	6	12	+6
Global Average	25	40	+15

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

Base: Those who live in countries participating in the G20, excluding Russia, 2016 pre (n=19,540) , 2025 (n=20,957). Participants were not asked about their own country.

Japan is viewed as the most positive influence in the world by young people in the G20. As with overall attractiveness, Japan’s rating is actually marginally down on 2023. However, the UK, which has led on this metric in previous waves, has seen its rating fall by a substantial seven points. The United States has also seen its rating fall – by a full ten points, putting it at near parity with China. Again, we are seeing an erosion in the ratings of Euro-Atlantic states’ while countries in the Global South like Argentina, China and Indonesia have seen their positions significantly strengthened. Russia too has made a significant recovery after a huge loss in credibility following the full scale invasion of Ukraine. In 2023 it was the only state with a net negative rating for influence in the world, but it has broadly recovered its previous position.

Influence in the world



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

Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n= 17,654). Participants were not asked about their own country.

3

The Importance of International Engagement

“There is a flickering spark in us all which, if struck at just the right age... can light the rest of our lives, elevating our ideals, deepening our tolerance, and sharpening our appetite for knowledge about the rest of the world. Educational and cultural exchanges... provide a perfect opportunity for this precious spark to grow, making us more sensitive and wiser international citizens through our careers.”

Ronald Reagan – 40th President of the United States Remarks at a White House meeting on 24 May 1982,
<https://www.reaganlibrary.gov/archives/speech/remarks-white-house-meeting-program-representatives-and-supporters-international>



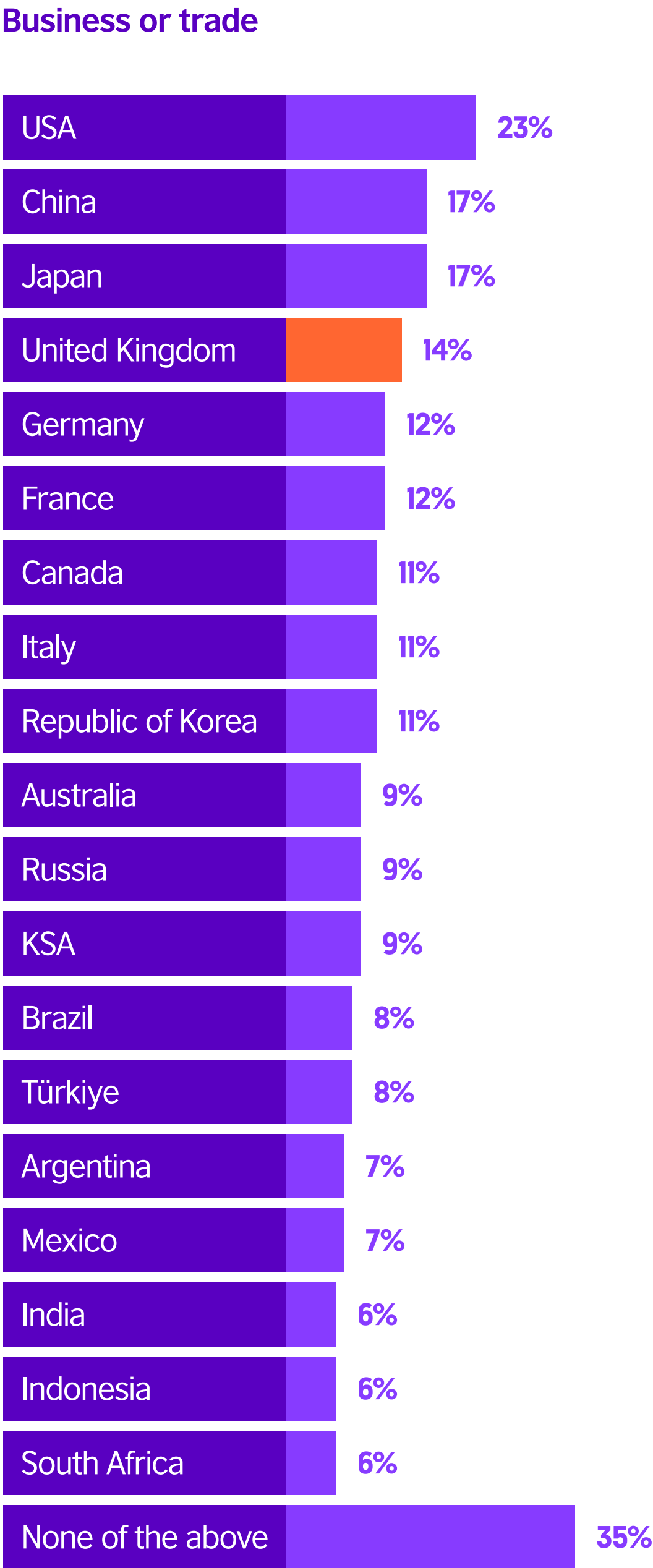
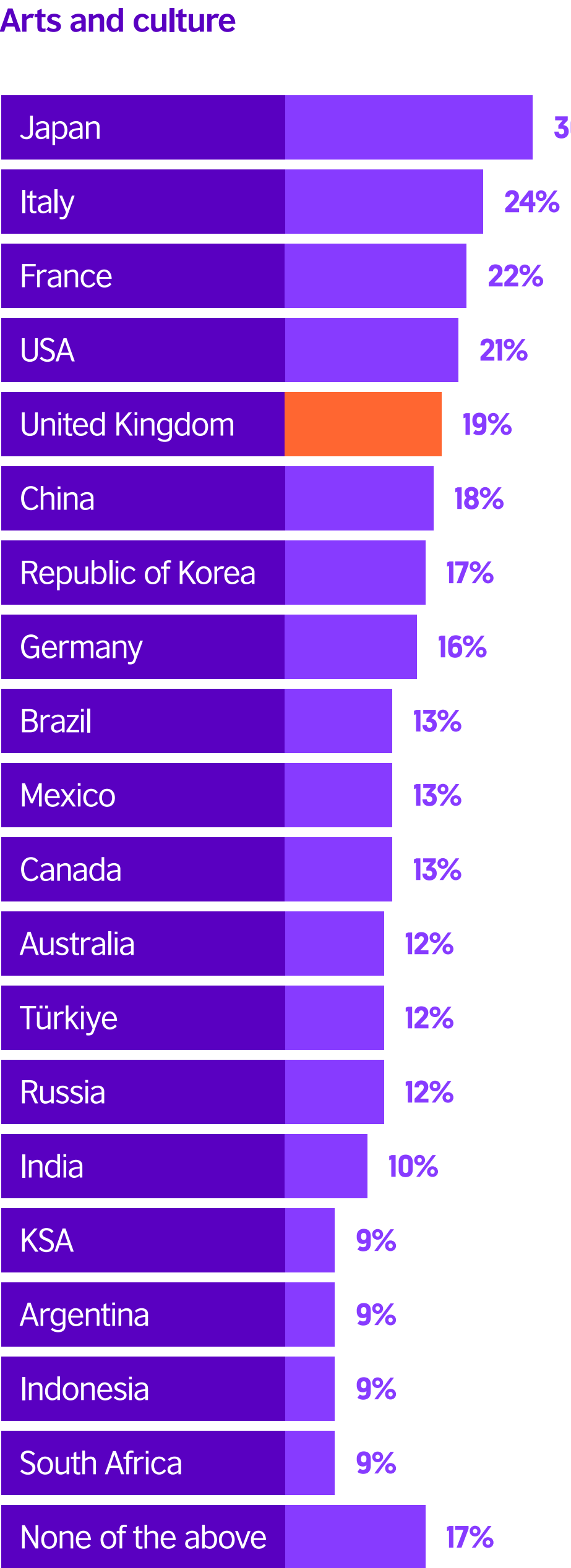
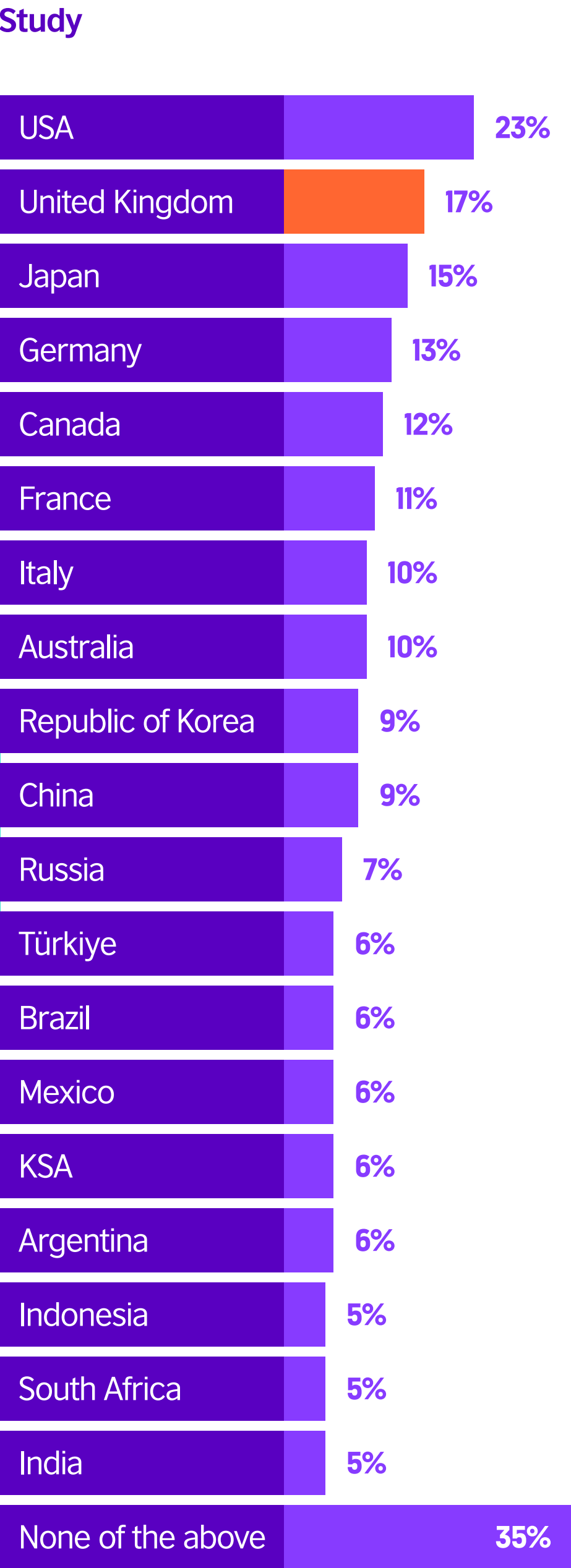
The advantages of being perceived as attractive and trusted are clear when we examine young people’s intentions to engage internationally. Japan, rated the most attractive country overall, is also the top choice for visits and cultural engagement. The data also shows that hard power plays an essential role in young people’s plans – the world’s two largest economies by GDP are the ones that receive the highest ratings for intentions to do business trade.

Similarly, the two countries with the highest numbers of top rated universities in the global league tables are the highest rated in terms of intentions to study. As with the comparable domains of attractiveness ratings, the USA performs far better relative to its peers than it does for trust or overall attractiveness. In many respects it remains the essential country, if not the most liked or respected.

Intentions to Engage

Thinking about your future plans... please select any of the following countries that you intend to study in/study again; whose arts and culture you intend to experience; you intend to do business or trade with or who to business or trade with again.

Base: Those who live in countries participating in the G20, excluding Russia, n=20,957. Participants were not asked about their own country.



Sport is a new addition to the study this year, so we do not have trend data to consider as we do other metrics. Nevertheless, it is clearly an area of real strength for the UK and, along with education, one where the UK enjoys a stronger reputation than either Japan or Italy.

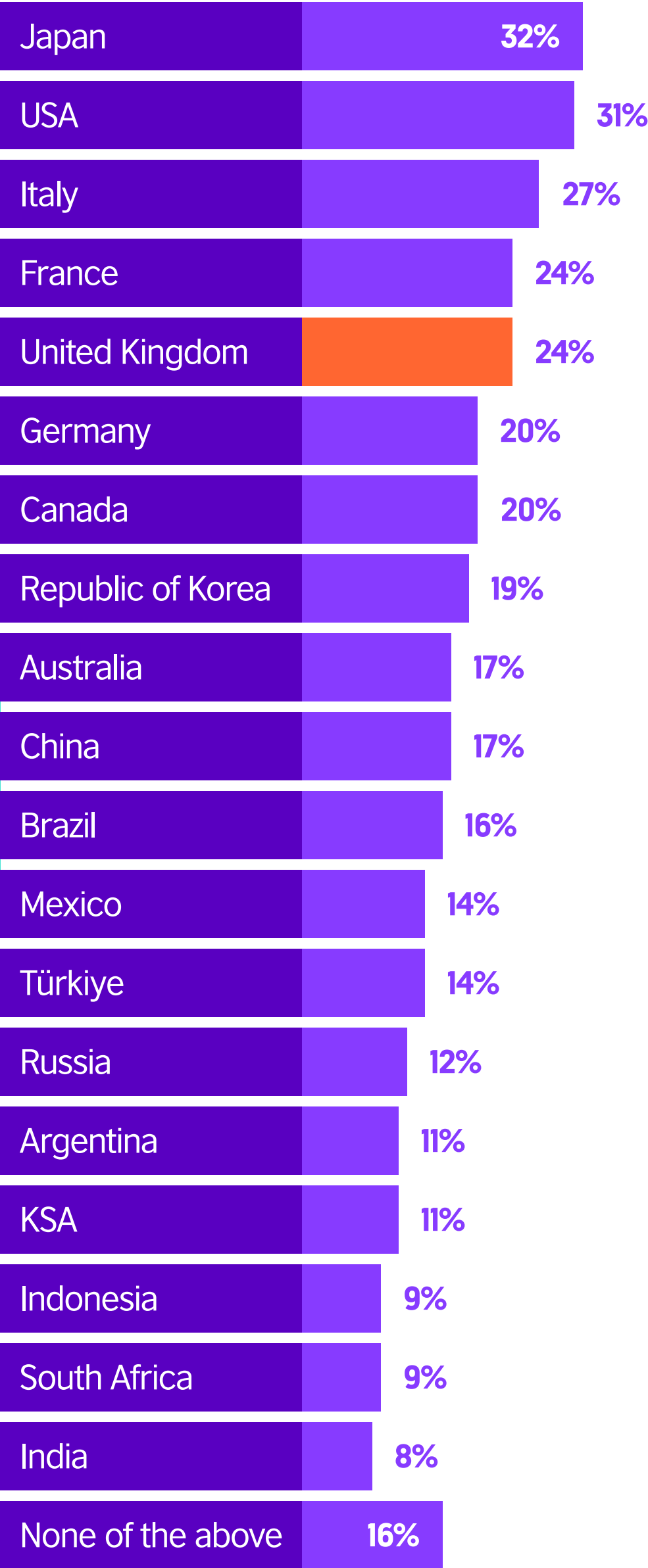
The Premier League, Formula 1, Wimbledon, the Boat Race, the Grand National, the Open and other UK greats are internationally famous. There is significant potential for the leveraging of these assets to bolster the UK’s international standing in an increasingly competitive world.

Intentions to Engage

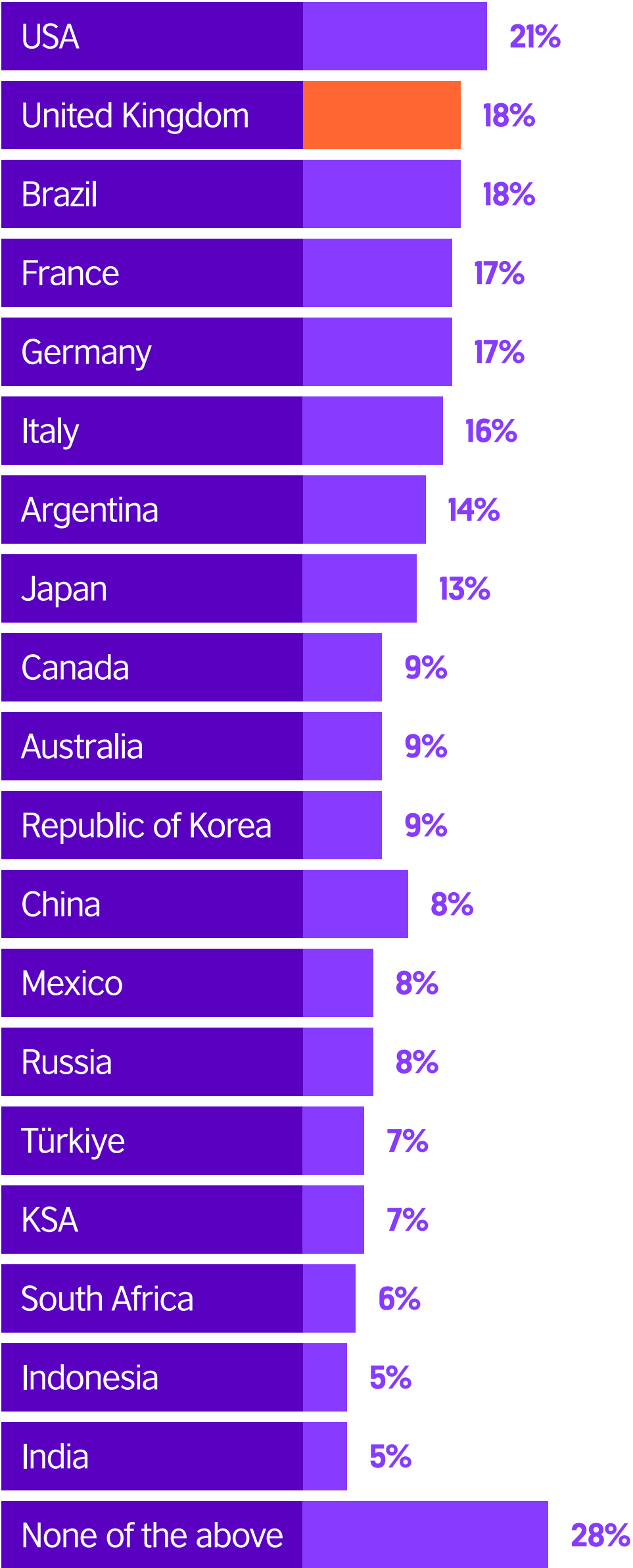
Thinking about your future plans... please select any of the following countries that you intend to visit/visit again; whose sports teams, clubs and events you intend to experience (again)?

Base: Those who live in countries participating in the G20, excluding Russia, n=20,957. Participants were not asked about their own country.

Visit as a tourist



Sports teams, clubs and events



Intentions to visit have declined across multiple markets between 2016 and 2025, significantly so for Euro-Atlantic states, perhaps reflecting declining levels of overall attractiveness. This trend pre-dated COVID-19 but the pandemic served to further deter young people from travelling. This may now be changing, intentions to visit the UK are still well down on 2016 but have increased when compared with 2023.

Intentions to engage with other countries through culture have also declined over time, though the fall is far less pronounced. It is less easy to explain this away as a consequence of the pandemic. Certainly, the numbers visiting Walt Disney World Orlando took a hit during lockdown, but you do not have to get on a plane to watch Inside Out 2 or Andor – Disney+, Hulu and ESPN+ have over 200 million global subscribers. Changing tastes are the most likely driver. Absent another ‘the British are coming’, Cool Britannia or London 2012 style cultural moment, both China and Republic of Korea are very likely to surpass the UK on this metric, pushing it out the top five, in the next wave of the study – China is up three points since 2016, while Republic of Korea is up seven.

But while there has been a widespread decline in interest in intentions to visit and engage culturally with Western countries, intentions to engage internationally for both doing business and studying overseas are up. Hard power still matters: the two countries most favoured for business and trade are also the world’s largest economies. But beyond the top two, the rankings begin to diverge from GDP size. It’s been two decades since the UK was the world’s fourth-largest economy, yet it has consistently held fourth place in our study – even as its relative economic position has declined. If GDP were the sole driver, Germany and India would rank higher. This suggests that as global competition intensifies, other factors – such as trust and cultural appeal – play a decisive role.

Changes in young people’s intentions to engage with other countries 2016-2025

Choices about where to study reflect a blend of ‘hard’ and ‘soft’ considerations. Young people weigh academic reputation and career prospects alongside lifestyle and cultural affinity. While countries with top-ranked universities still perform particularly well, the once-commanding lead of the US and UK has been steadily eroding over time. The UK’s rating appears to be static, while those of its competitors are increasing, reflecting greater competition. Rising academic quality in China and other Asian countries, coupled with the widespread adoption of English as the medium of teaching, and a growing emphasis on quality of life beyond the classroom, are reshaping the landscape. In this environment merely having the UK’s most powerful supercomputer will not in itself be enough to entice students to Edinburgh University. Selling Edinburgh as a destination – the Festivals, tartan tat, Harry Potter and all – will be vital to the university's continued success in attracting international students.

Study				Arts and culture			
Country	2016	2025	Points Change	Country	2016	2025	Points Change
USA	20%	23%	+3	Japan	25%	30%	+5
UK	16%	17%	+1	Italy	24%	24%	0
Germany	9%	13%	+4	France	24%	22%	-2
Japan	7%	15%	+8	USA	22%	21%	-1
Canada	9%	12%	+3	UK	22%	19%	-3

Business / trade				Visit			
Country	2016	2025	Points Change	Country	2016	2025	Points Change
USA	19%	23%	+4	Japan	30%	32%	+2
China	11%	17%	+6	USA	42%	31%	-11
Japan	12%	17%	+5	Italy	35%	27%	-8
UK	12%	14%	+2	France	34%	24%	-10
Germany	9%	12%	+3	UK	34%	24%	-10
France	7%	12%	+5				

Thinking about your future plans... please select any of the following countries that you intend to study in/study again; whose arts and culture you intend to experience; you intend to do business or trade with or who to business or trade with again; intend to visit/visit again; whose sports teams, clubs and events you intend to experience (again)?

Base: Those who live in countries participating in the G20, excluding Russia, 2016 pre (n=19,540), 2025 (n=20,957). Participants were not asked about their own country.

4

The UK – a Trusted Partner in a Changing World

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

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



The significant six-point drop in the UK’s average rating for overall attractiveness reflects a near-universal decline across individual countries. One of the largest falls is in the United States. However, this may say less about the UK and more about the dramatic shifts within the USA itself – ratings from young Americans for other Western states have seen even more alarming declines. Canada, for example, is down an astonishing twenty points; Italy, nineteen; France, eighteen; and so on.

Country-level ratings for the UK are useful in identifying where targeted efforts could help bolster its position. Working through the Commonwealth, for instance, may offer a route to reversing the decline in perceptions of the UK in India and South Africa.

The UK’s declining ratings for overall attractiveness 2023 to 2025 from individual G20 countries

Country	2023 (% Attractive 6-10)	2025 (% Attractive 6-10)	Change in Rating (% points) since 2016
India	86	79	-7
South Africa	86	79	-7
Mexico	84	75	-9
Indonesia	82	68	-14
Brazil	80	77	-3
China	79	76	-3
Australia	78	75	-3
Argentina	77	72	-5
Italy	77	71	-6
Canada	76	70	-6
Kingdom of Saudi Arabia	75	72	-3
Türkiye	72	65	-7
Republic of Korea	70	67	-3
USA	70	59	-11
France	67	67	0
Germany	66	65	-1
Japan	63	58	-5
Global Average	76	70	-6

Taking everything into consideration, how attractive overall do you find each of the countries below?

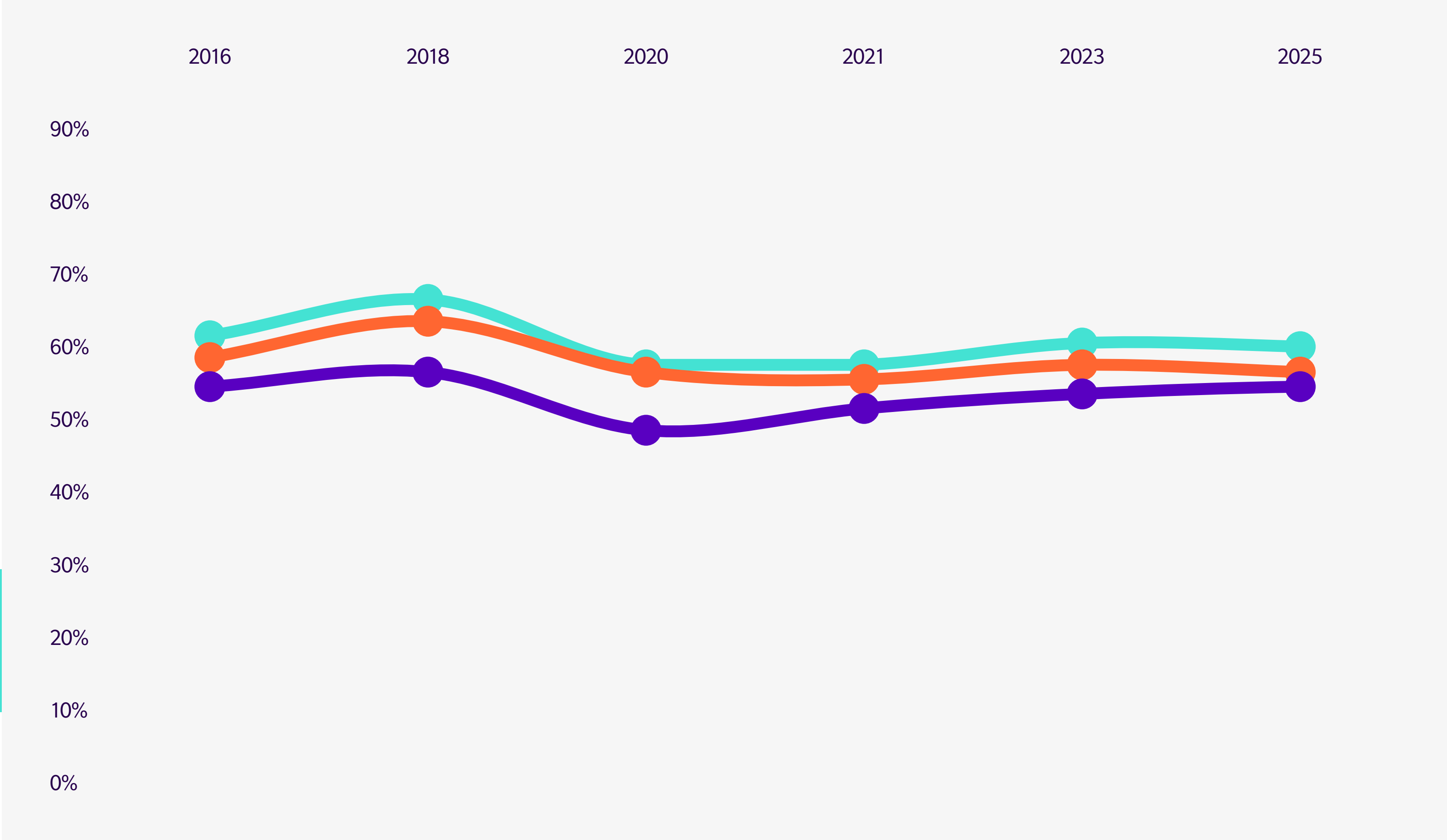
Base: Those who live in countries participating in the G20, excluding Russia, 2023 (n=17,001), 2025 (n=17,654). Participants were not asked about their own country.

The UK’s ratings have shown remarkable resilience over time, setting it apart from the rest of the G20. That’s why the recent six-point fall in overall attractiveness is so striking. Yet, the data on trust reveals that the UK continues to be widely recognised as a reliable and trustworthy global actor.

This enduring trust is a strategic asset in the UK Government’s pursuit of growth through trade agreements and foreign direct investment. It also underpins the UK’s key alliances: the sharing of intelligence and sensitive technologies depends on mutual confidence that commitments will be upheld, and partners won’t be compromised.

A known and trusted actor

Trust in the UK has held firm even as close allies with comparable political economies and societal profiles – such as Canada and Australia – have experienced significant declines. But this erosion of credibility among peer nations highlights a critical point: the UK’s trust advantage cannot be taken for granted. It demands an active policy of global engagement, investment in confidence-building measures, like cultural and educational exchanges, and visible leadership on shared global challenges such as climate change.



Trust in UK people (6-10) Trust in UK institutions (6-10) Trust in UK government (6-10)

Thinking generally about government, to what extent do you distrust or trust the people/government/institutions from each of these countries?

Base: Those who live in countries participating in the G20, excluding Russia, 2016 pre (n=19,540), 2025(n=20,957). Participants were not asked about their own country.

Given the focus on the UK-EU reset it is worth considering how the UK has performed in the three EU G20 states. Looking at the change in the rankings over time there was a clear drop in the aftermath of the UK’s vote to leave the European Union back in 2016 but the damage to the UK’s position has repaired. Even the UK’s apparent sharp drop in its ranking in Germany this year is not a particular sign of danger – the UK’s rating is actually up eleven points on 2023, it’s just other states have seen marginally higher rises that have put them ahead of the UK.

Greater insight comes when we look at how all four European G20 states rate each other for trust in government – doing so makes it clear that the UK is in a strong position. The results from France are especially interesting with the UK rating for trust in government eleven points higher than Germany’s.

The UK’s rankings for trust in government in France, Germany and Italy 2016-2025						
Country	2016	2018	2020	2021	2023	2025
France	2	3	3	3	2	1
Germany	3	4	4	3	1	5
Italy	2	4	5	4	2	2

EU-UK reset

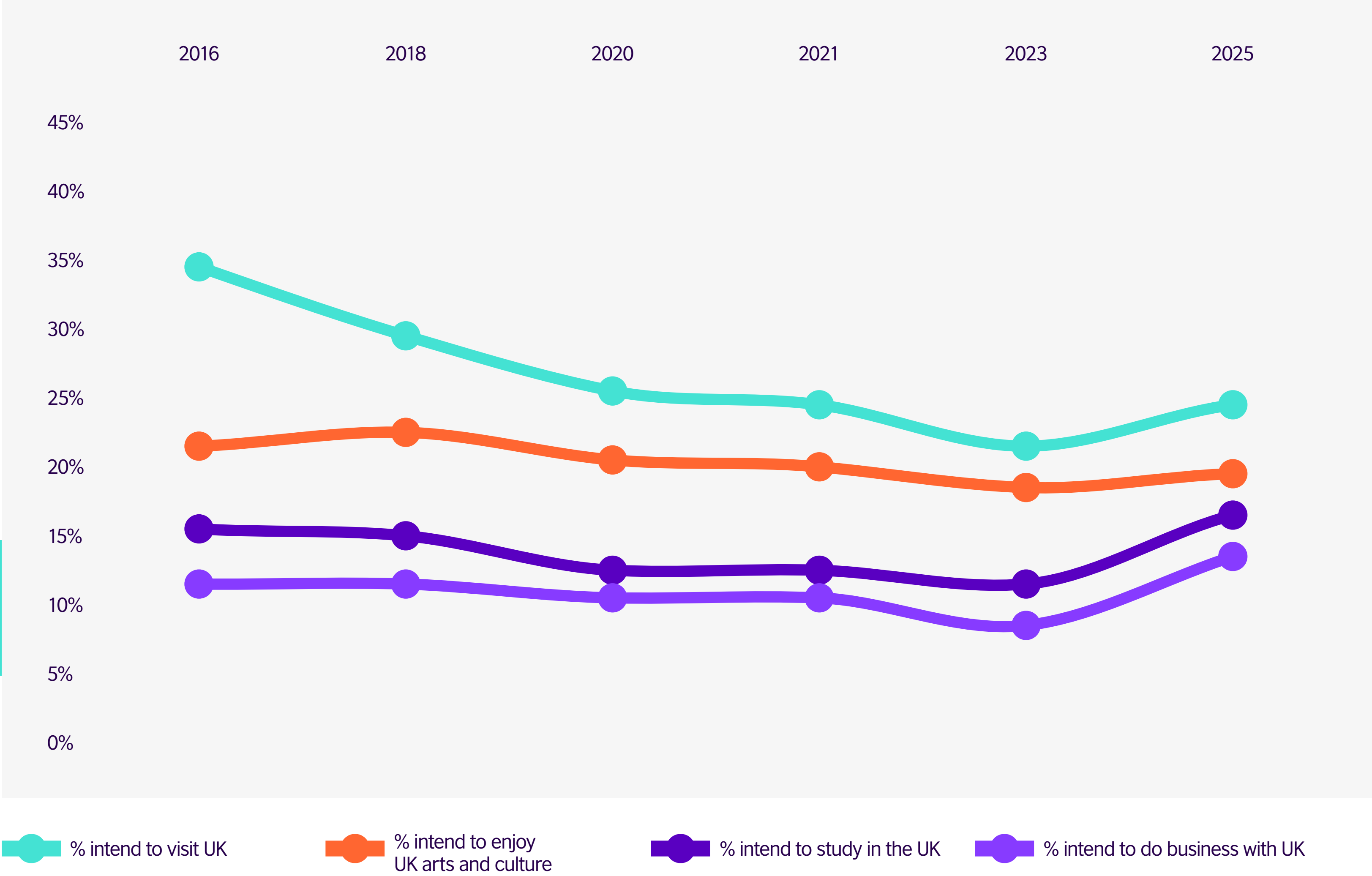
	Trust in Government	(% Trust 6-10)			
How people from ↓ rate ↑	France	Germany	Italy	UK	
France	n/a	46%	53%	57%	
Germany	54%	n/a	57%	53%	
Italy	52%	56%	n/a	60%	
UK	50%	52%	52%	n/a	

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

Base: Those who live in France, Germany, Italy and the United Kingdom (n=1009-3303). Participants were not asked about their own country

Intentions to engage with the UK over time have been trending downwards since before COVID-19, with intentions to visit the UK dropping a precipitous twelve points between 2016 and 2023. However, things may now be turning around. Intentions to engage with the UK are up on 2023 across all metrics, though the ratings for tourism are still ten points down on 2016. Compared to the decline in intentions to visit the UK, the fall in interest in UK arts and culture is far more modest but still a risk for an increasingly important sector to the UK economy. The story with intentions to study is similar but, despite falling ratings for attractiveness, intentions to study are sharply up this year after a long period of decline and are now at their highest ever level recorded in the study. Intentions to do business/trade have similarly increased to an all-time high. This is all very positive news for the UK plc.

Intentions to engage with the UK 2016-2025



Thinking about your future plans... please select any of the following countries that you intend to study in/study again; whose arts and culture you intend to experience; you intend to do business or trade with or who to business or trade with again; intend to visit/visit again?

Base: Those who live in countries participating in the G20, excluding Russia, 2016 pre (n= 19,540), 2025 (n=20,957). Participants were not asked about their own country.

There is good news for the UK when it comes to intentions to engage with the country for the purposes of business/trade. This year there has been a significant five point increase in the global average on the performance recorded in 2023, with that average rating now the highest ever recorded in the study. The UK has consistently been in the top five for this metric over the lifetime of the study. However, it is worth noting that the UK’s competitors are also doing well. The UK is up an average of two points on its position in 2016, but Japan is up six points. Countries with lower ratings than the UK are also doing well – Germany is up three points and France is up five points, closing the gap on the UK and revealing growing global competition in this space.

Shifts in intentions to engage for business or trade with the UK across the G20 2016-2025

While the average rating for the UK is up on 2016, when we consider individual markets, for example China, the UK’s rating has declined significantly over the period. The data then offers insights on where the opportunities for the UK plc are, and where attention is needed to bolster a softening of the UK’s position. However, the overall picture is a positive one of generally increasing interest in international engagement, following the isolationism that has to date characterised the post-COVID era.

Country	2016	2025	Change in Rating (% points) since 2016
Argentina	5%	10%	+5
Australia	10%	14%	+4
Brazil	11%	11%	0
Canada	9%	14%	+5
China	20%	14%	-6
France	7%	10%	+3
Germany	8%	15%	+7
India	23%	23%	0
Indonesia	23%	16%	-7
Italy	10%	16%	+6
Japan	2%	5%	+3
Mexico	8%	9%	+1
Kingdom of Saudi Arabia	7%	14%	+7
South Africa	34%	26%	-8
Republic of Korea	8%	12%	+4
Türkiye	10%	16%	+6
USA	11%	13%	+2
Global Average	12%	14%	+2

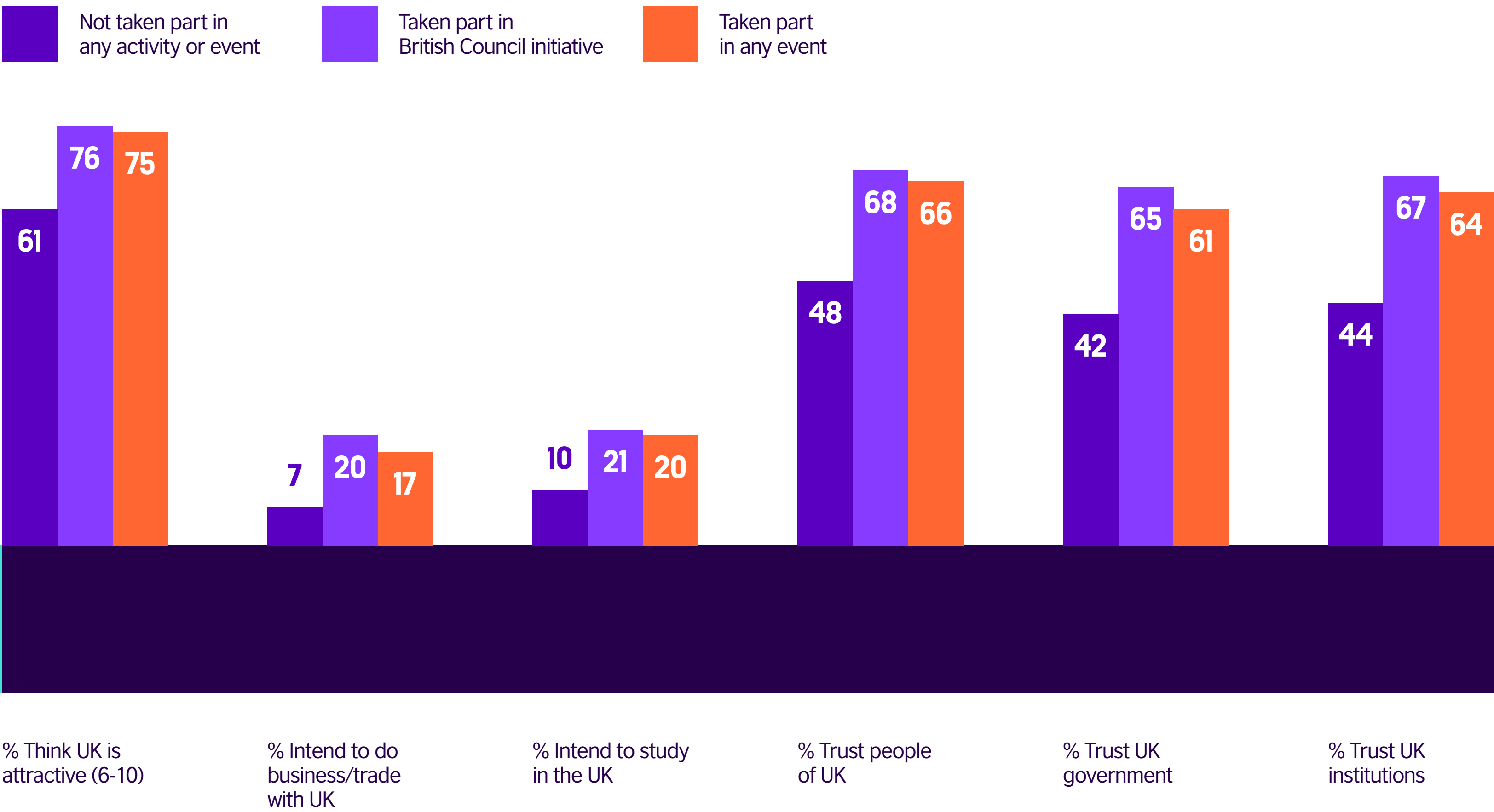
Thinking about your future plans... please select any of the following countries that you intend to do business or trade with, or who to business or trade with again?

Base: Those who rated the UK, 2016 (n=17,032), 2025 (n=17,654).

Young people across the G20 who have engaged with the UK through cultural or educational exchange programmes are significantly more likely to view the UK as both attractive and trustworthy. Crucially, when that engagement is curated by the British Council, they are three times more likely to express an intention to do business and trade with the UK.

For a government that regards growth as its “single defining mission,” this is not a peripheral finding. Cultural and educational exchange is not just soft power; it is smart power. It builds the trust, familiarity, and intent that underpins future trade, investment, and collaboration. If the UK is serious about growth, then sustained, strategic investment in cultural engagement must be front and centre of its strategy.

The importance of cultural engagement to positive perceptions – and intentions to engage – with the UK



Data shown sourced from multiple Qs covered above Base:
Those who had not taken part in any activity or event (n=6,748)
Those who had taken part in a BC initiative (n=) Those who had taken part in any event (n=14,209)

5

Values

"Thus shall we live, because we will have created a society which recognises that all people are born equal, with each entitled in equal measure to life, liberty, prosperity, human rights and good governance."

Nelson Mandela, Nobel Prize Lecture 1993,
<https://www.nobelprize.org/prizes/peace/1993/mandela/lecture/>

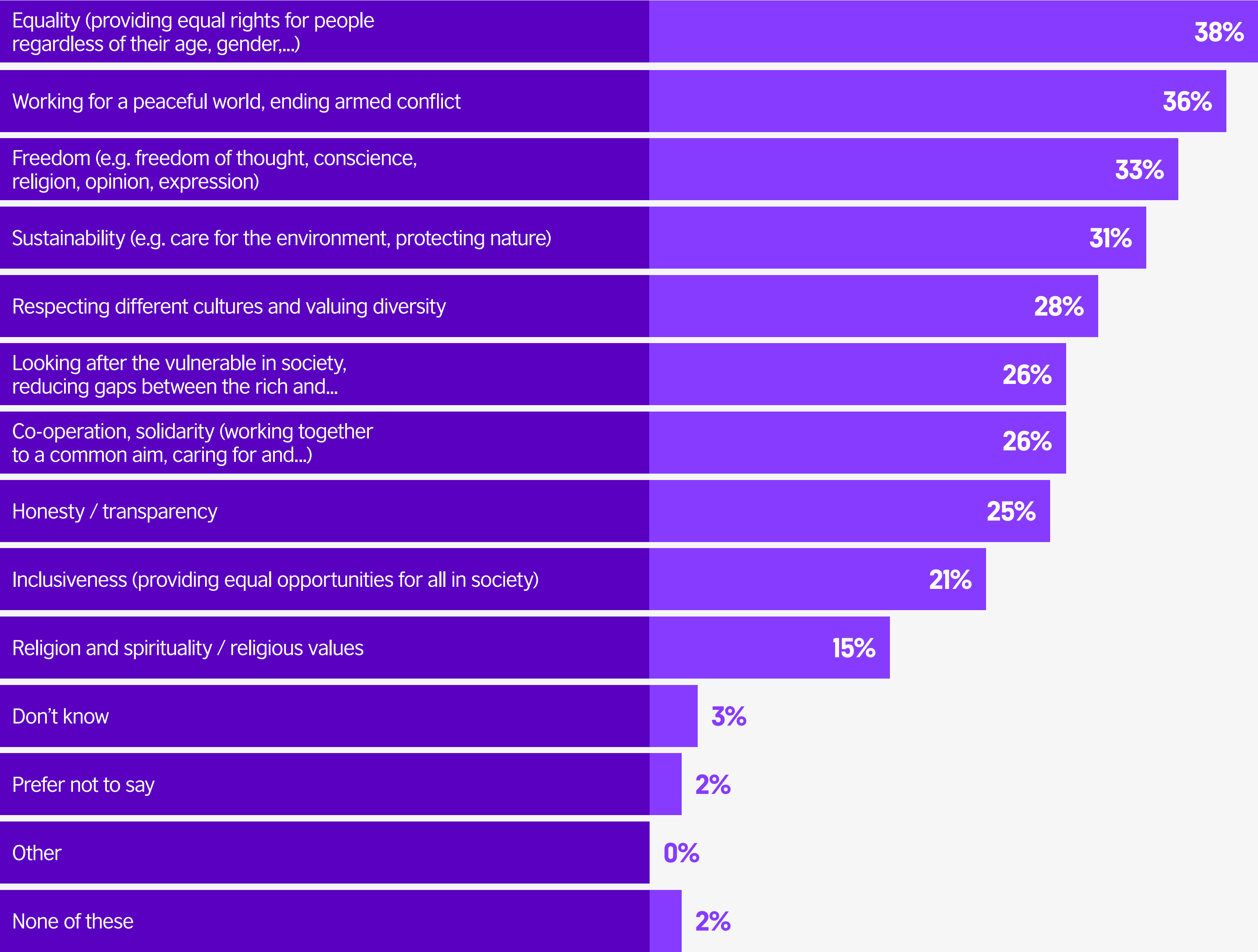


There is broad consensus among young people across the G20 that the most important values in the world today are equality, peace, and freedom. Considering sustained media coverage of conflicts in the Middle East, Sub-Saharan Africa and Ukraine, the nine-point rise in the rating for peace since 2023 is unsurprising – and telling. While sustainability has dropped out of the top three, its rating has held steady, suggesting it remains a latent concern, just overshadowed by sharper rises in peace and freedom.

Previous waves of this study have consistently shown a strong correlation between political and social freedoms and positive perceptions of states. When paired with perceptions of wealth and success, these values have formed the backbone of soft power. States that lacked one or the other – for example, wealthy but authoritarian regimes – have historically ranked lower than rich liberal democracies.

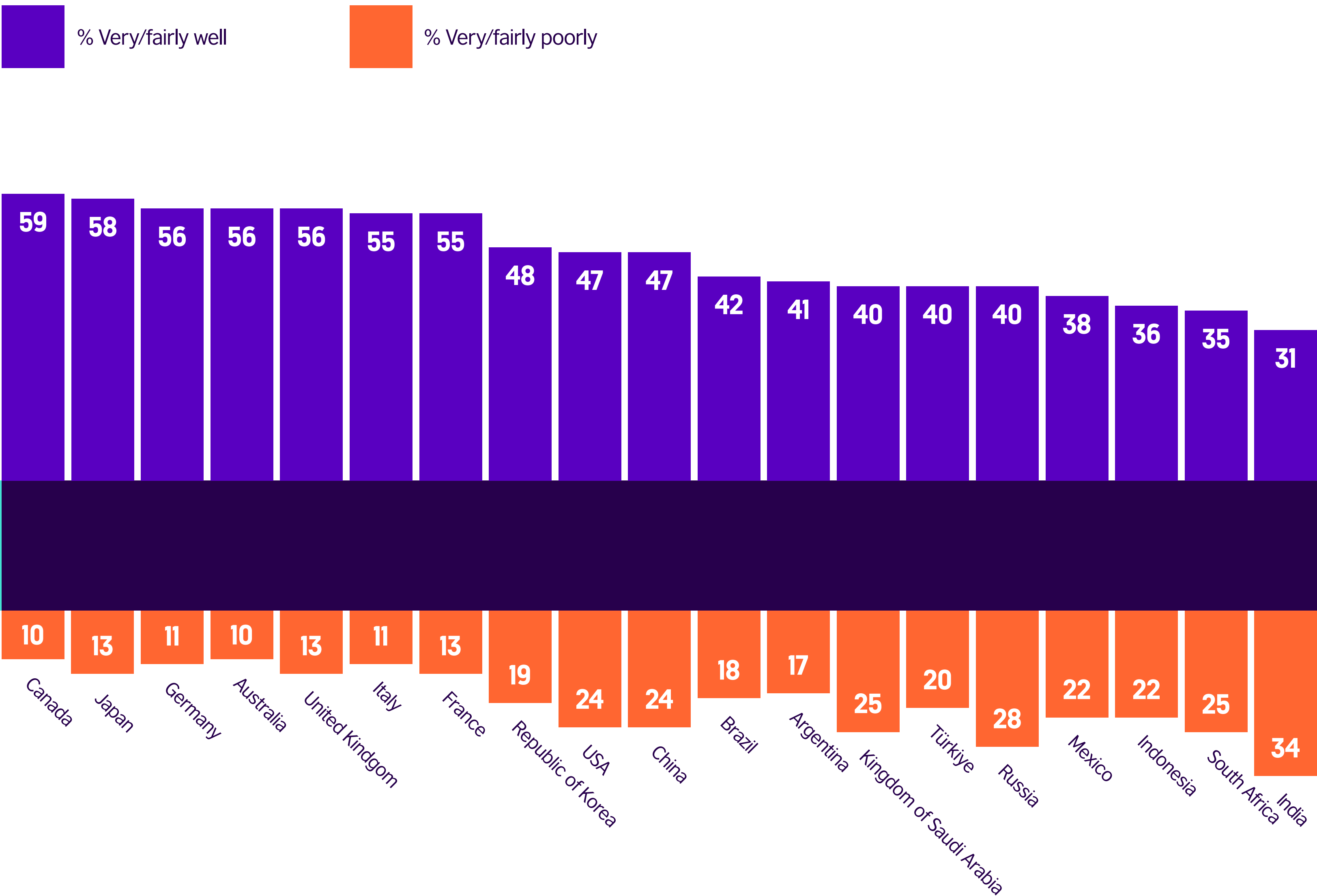
Most important values in the world today

However, this dynamic appears to be shifting. In the current wave, authoritarian states are gaining ground, while the appeal of established democracies is softening. This may reflect a recalibration of what young people value in global leadership – possibly driven by perceptions of effectiveness, stability, or cultural assertiveness. Yet young people still clearly prize equality and freedom, values associated with liberal, democratic states. This may mean that while authoritarian states are clearly advancing, there may be a ceiling on just how far they can progress.



Liberal, capitalist democracies continue to be perceived as best aligned with 21st-century values. Among Western states, there is remarkable consistency in ratings, with just four points separating Canada (ranked first) and France (ranked seventh). Republic of Korea and the United States trail behind, with the U.S. receiving twice the rating for ‘very/fairly poorly’ compared to the top seven. Still, most states have improved their ratings since 2023 – the U.S. included. What stands out most is the parity in ratings between the United States and China – two states with profoundly different political economies.

How well do G20 countries support the values young people most prize?



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

Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n=20,957).

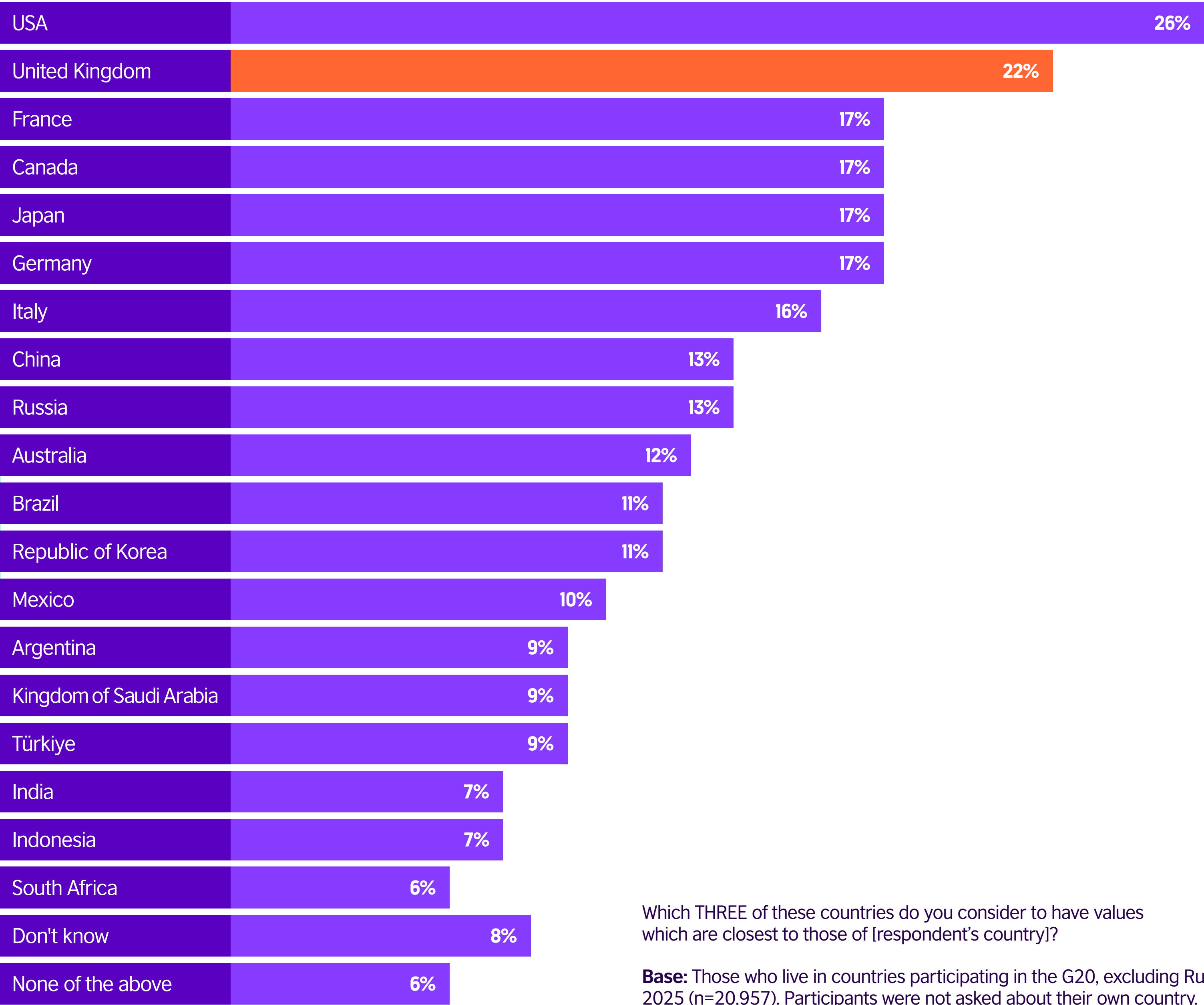
Exposure is a double-edged sword. While the United States appears to be penalised by familiarity when judged on its alignment with key values, it also benefits from being perceived as having values closest to respondents’ own countries. As our Big Conversation research revealed, that matters – shared values play a critical role in creating the conditions for collaboration.

The UK is similarly well positioned. It enjoys a strong sense of cultural affinity and is seen as a values-led actor. This provides a powerful platform for engagement, enabling the UK to co-opt and collaborate with others in pursuit of shared goals.

Values proximity

Cooperation doesn’t happen automatically. It’s built over time through relationships grounded in mutual trust, respect, and understanding. Shared values and attitudes create the conditions for collaboration – especially across diverse backgrounds. People are more inclined to work with others when they feel values, not just interests, are aligned. And where values differ, understanding and appreciation can still enable cooperation.

Alison Bailey, Values and Cooperation – A Cultural Relations Perspective, British Council (2021) https://www.britishcouncil.org/sites/default/files/the_big_conversation_pilot_research_briefing.pdf



Which THREE of these countries do you consider to have values which are closest to those of [respondent’s country]?

Base: Those who live in countries participating in the G20, excluding Russia, 2025 (n=20,957). Participants were not asked about their own country.

Conclusion

Global Perceptions 2025 reveals a world in flux. The dominance of Western democracies in soft power is no longer assured. While they remain broadly attractive and trusted, their lead is narrowing. The rise of East Asian and Global South states – especially Japan, Republic of Korea, China, and Kingdom of Saudi Arabia – signals a decisive shift toward a more multipolar global order.

This is not just a redistribution of influence. It's a redefinition of what influence looks like. Young people increasingly value capability, stability, and cultural relevance. Authoritarian states are gaining esteem, not because their values are embraced, but because they are seen as effective. Yet freedom, equality, and peace remain the most prized values globally. This tension – between admiration for capability and aspiration for values – will shape the future of global leadership.

For the UK, the picture is mixed. A six-point drop in overall attractiveness is a warning sign. But trust remains high, and engagement metrics are rebounding. The UK is still seen as a reliable, values-led actor – an asset in a world where trust is the currency of cooperation. To maintain this edge, the UK must invest in the relationships, programmes, and platforms that build familiarity and foster trust.

Soft power is not a luxury – it's leverage. Cultural and educational exchange, especially when curated by institutions like the British Council, delivers measurable returns in trade, diplomacy, and global influence. If the UK is serious about growth, it must be serious about soft power.

The data also delivers a final, sobering insight: young people's faith in democracy is faltering. The appeal of authoritarian governance is rising. But values still matter. The UK – and other liberal democracies – must prove that freedom and equality are not just ideals, but effective foundations for progress.

This is a watershed moment. Influence is no longer inherited – it must be earned. The UK has the tools. What's needed now is the will.

Biennial online survey in its 9th year
The sample size varies by country, from 1005 to 3303.

Online fieldwork took place from April to July 2025.

Data collected is representative of the general population aged between 18 and 34 (inclusive), balanced for gender, region and ethnicity/nationality (where applicable) within each country.

Due to the combination of sanctions and the open hostility of the Russian state towards the British Council we were unfortunately unable to run the survey in the Russian Federation. To allow for longitudinal comparisons, data from Russia collected in previous waves has been excluded. However, we still have data from the other 18 G20 member states reflecting how people view Russia.

Methodology

Savanta has taken over this research from a previous supplier as of 2025. Effort has been made throughout to replicate the original survey, ensuring consistency in methodology and keeping tracking questions as close as possible to previous waves mirroring historic sample design as far as possible. The data is weighted to be representative of each country’s population aged 18 to 34, by age, gender, and region. This approach closely follows the methodology used in previous waves as far as possible.

18 G20 member states	20,957 respondents	1000+ respondents
Argentina	Germany	Kingdom of Saudi Arabia
Australia	India	South Africa
Brazil	Indonesia	Republic of Korea
Canada	Italy	Türkiye
China	Japan	UK
France	Mexico	USA

Global averages

Unless otherwise indicated, global average are composed of all 18 countries surveyed.

Margin for error

18-market global data margin of error: General population +/- 0.7 percentage points. Country-specific data margin of error: General population +/- 2.8 to 3.8 percentage points (varies by country based on sample size, n=1005 to n=3303). Margin of error is calculated at the 99% confidence level.

Statistical significance



All indicated year-over-year significant changes were determined using a t-test set at a 99%+ confidence level.

Shortened question text

Throughout the report, question text has been edited for readability.

Previous waves of global perceptions	Year	Supplier	Countries	Sample size
	2016 (two waves)	Ipsos MORI	G20 (excluding the EU)	Wave 1 – 18,032 Wave 2 – 18,010
	2018	GfK Social and Strategic Research	G20 (excluding the EU)	18,652
	2020	Ipsos MORI	G20 (excluding the EU), plus an additional 17 countries	G20 only –19,612 total – 36,158
	2021	Ipsos MORI	G20 (excluding the EU)	19,615
	2023	Ipsos UK	G20 (excluding the EU and Russia)	19,601
	2025	Savanta	G20 (excluding the EU and Russia)	20,957

Full list for 2020: Argentina, Australia, Brazil, Canada, China, Colombia, Czech Republic, Egypt, France, Germany, Greece, Hungary, India, Indonesia, Ireland, Italy, Japan, Kazakhstan, Kenya, Malaysia, Mexico, Nigeria, Pakistan, Poland, Romania, Russia, Kingdom of Saudi Arabia, Singapore, Slovakia, South Africa, Republic of Korea, Spain, Türkiye, Ukraine, UK, USA

