



POLL

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Views of Europe Slide Sharply in Global Poll, While Views of China Improve

Positive views of the European Union and European nations have declined sharply over the last year—so much so that Germany has been overtaken by Japan as the world's most positively viewed major nation, a new 22-country global poll for BBC World Service suggests.

The poll also finds that views of China have improved significantly over the last year, in both the developing and industrialised world, and that the country has now overtaken both the EU and the US. Views of the US overall remained similar to 2011 despite large shifts in some regions.

The 2012 Country Ratings Poll, conducted by GlobeScan/PIPA among 24,090 people around the world, asks respondents to rate whether the influence of each of 16 countries and the EU is “mostly positive” or “mostly negative.”

While in past years the EU has generally received quite positive ratings, this year positive views of the EU have dropped eight points on average, from 56 to 48 per cent, across the countries polled in 2011 and 2012. Ratings of other European nations dropped as well, with the UK down six points and France down four.

Germany, the most positively regarded nation last year, has seen its positive ratings drop from 60 to 56 per cent. This puts Germany in second place behind Japan, which is now rated most positively—by 58 per cent on average, up two points from last year. Canada (rated positively by 53%) and the UK (by 51%) are the third and fourth most positively viewed countries.

Positive views of China rose from 46 to 50 per cent on average. They jumped particularly sharply in the UK (up 19 points), as well as in Australia, Canada, and Germany (all up 18 points). These gains follow modest rises between 2010 and 2011. On average, views of the US have hardly changed, with 47 per cent expressing positive views and 33 per cent negative, compared to 48 and 31 per cent in 2010.

The most negatively rated countries were, as in previous years, Iran (55% negative), Pakistan (51% negative), and Israel and North Korea (both 50% negative).

GlobeScan President Chris Coulter comments: “The turmoil in the EU, long seen as an attractive bastion of political and economic stability, has raised doubts in people’s minds about its continued ability to be a global leader. Hopes are turning to China.”

Steven Kull, Director of PIPA, adds: “The fact that views of the EU itself had a sharper downturn than specific EU countries suggests doubts about how the EU is dealing with its collective problems.”

A total of 24,090 citizens across 22 countries were interviewed face-to-face or by telephone between December 6, 2011 and February 17, 2012. Polling was conducted for BBC World



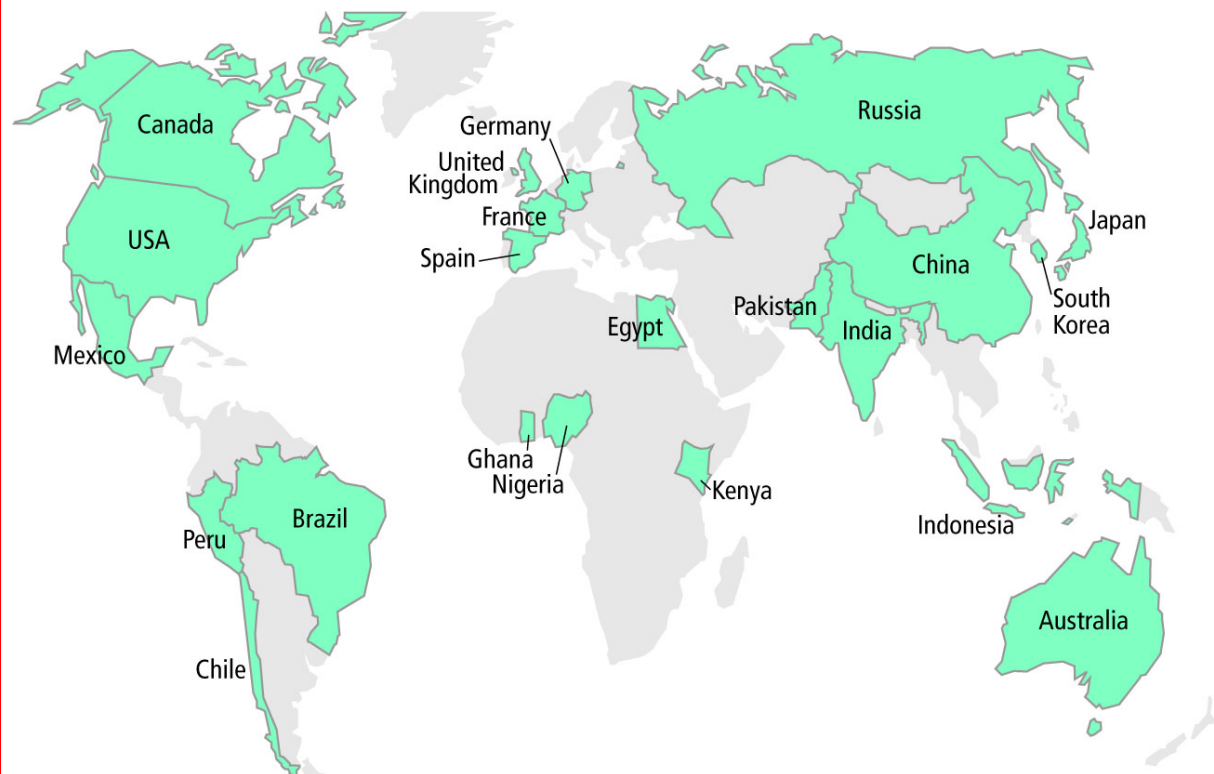
Service by the international polling firm GlobeScan and its research partners in each country, together with the Program on International Policy Attitudes (PIPA) at the University of Maryland. Countries were rated by half samples in all countries polled. In five of the 22 countries, the sample was limited to major urban areas. The margin of error per country ranges from +/- 2.9 to 4.9 per cent, 19 times out of 20.

Other Key Findings

Although views of the US were little changed since 2011, there have been some sharp regional swings, with positive views rising in Europe (France from 46 to 62%, UK from 38 to 57%, Spain 41 to 51% and Germany 37 to 44%), but dropping in South America (Chile 62 to 47%, Brazil 64 to 55%, and Peru 53 to 46%).

The falls in positive ratings of the EU since 2011 were particularly marked in some countries. There were particularly sharp falls in Ghana (down 26 points), Indonesia (down 20 points), Chile (down 18 points), and Australia and South Korea (down 17 points each).

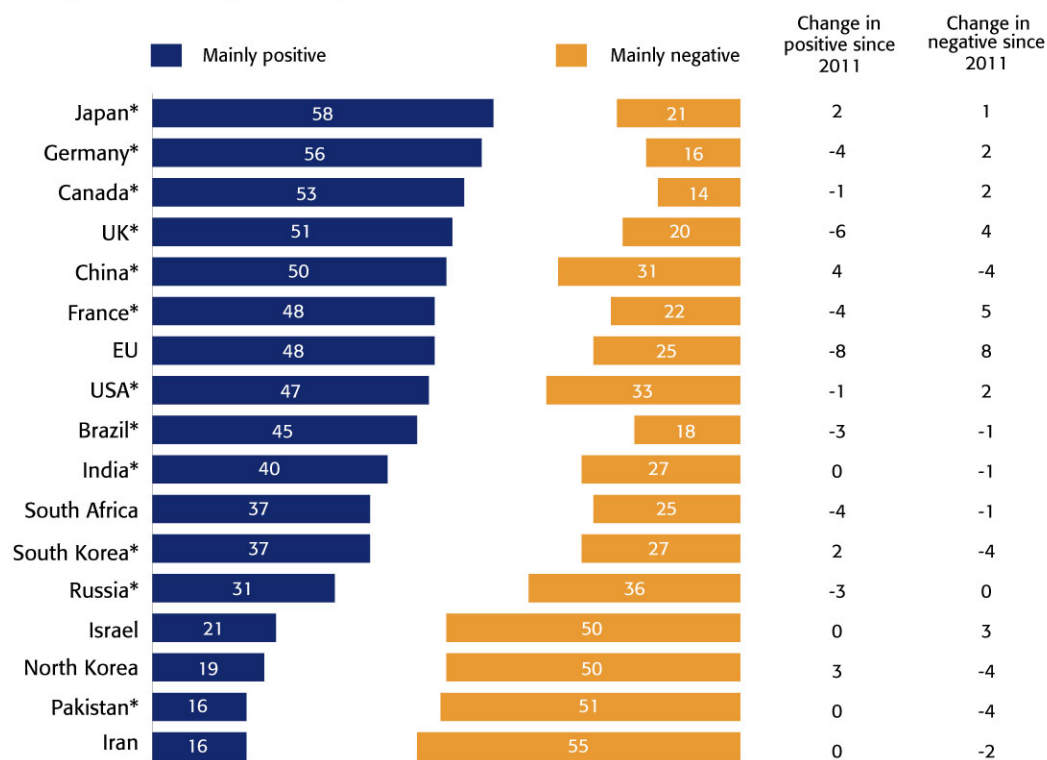
Participating Countries



In Brazil, China, Egypt, Indonesia, and Kenya urban samples were used.

Views of Different Countries' Influence

Average of 22 Tracking Countries, 2011–2012



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Note: average ratings exclude the target country's rating of itself, meaning some of the averages are based on 21 and not 22 countries.

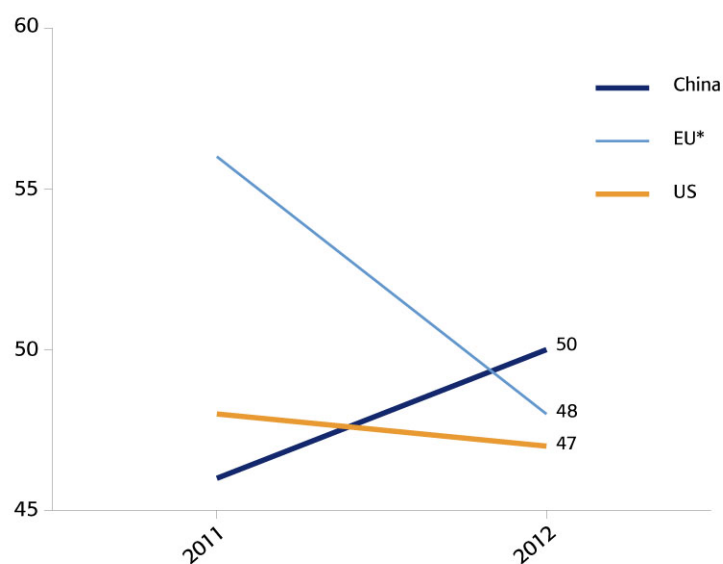
*Average of 21 tracking countries

The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA."

Asked of half of sample

Views of Countries' Positive Influence: China vs US vs EU

Average of 21 Tracking Countries, 2011–2012



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Note: for China and the US, average ratings exclude the target country's rating of itself

*Average of 22 countries

Asked of half of sample

For more details, please visit www.GlobeScan.com or www.WorldPublicOpinion.org as well as the GlobeScan Insights blog at <http://globescaninsights.blogspot.com>.

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The Program on International Policy Attitudes (PIPA) of the Center for International and Security Studies at the University of Maryland, undertakes research on attitudes in publics around the world on a variety of international issues and manages the international research project WorldPublicOpinion.org.

BBC World Service is an international multimedia broadcaster, delivering a wide range of language and regional services on radio, TV, online and via wireless handheld devices. It uses multiple platforms to reach its weekly audience of 166 million globally, including shortwave, AM, FM, digital satellite and cable channels. Its news sites include audio and video content and offer opportunities to join the global debate. BBC World Service offers its multilingual radio content to partner FM stations around the world and has numerous partnerships supplying content to news websites, mobile phones and other wireless handheld devices as well as TV channels. For more information, visit bbcworldservice.com.

Questionnaire

I would now like to ask your impressions of some specific countries.

M1A. Please tell me if you think each of the following countries is having a mainly positive or mainly negative influence in the world.

ROTATE

at) China

- 01 – Mainly positive
- 02 – Mainly negative

VOLUNTEERED (DO NOT READ)

- 03 – Depends
- 04 – Neither, neutral
- 99 – DK/NA

bt) France

ct) The United States

dt) The European Union

et) Japan

ft) Israel

gt) North Korea

ht) Canada

M1B. Please tell me if you think each of the following countries is having a mainly positive or mainly negative influence in the world.

ROTATE

at) The United Kingdom

- 01 – Mainly positive
- 02 – Mainly negative

VOLUNTEERED (DO NOT READ)

- 03 – Depends
- 04 – Neither, neutral
- 99 – DK/NA

bt) Russia

ct) India

dt) Iran

et) Brazil

ft) Pakistan

gt) Germany

ht) South Africa

it) South Korea

ASK M3A OF A RANDOMLY SELECTED 100 RESPONDENTS FOR EACH COUNTRY RATED AT M1t. ASK ONLY OF THOSE WHO SAY POSITIVE/NEGATIVE FOR EACH COUNTRY AT M1

M3A. You said you thought [COUNTRY] had a mostly [POSITIVE/NEGATIVE] influence in the world. Which of the following areas is most influential in making you feel that way about [COUNTRY]? **RECORD ONLY ONE ANSWER FOR EACH COUNTRY**

at) China

- 01 – Its foreign policy
- 02 – Its traditions and culture including arts, music and food
- 03 – The way it treats its people
- 04 – Its economy, products and services
- VOLUNTEERED (DO NOT READ)**
- 05 – OTHER (SPECIFY)
- 99 – DK/NA

bt) France

ct) The United States

dt) The European Union

et) Japan

ft) Israel

gt) North Korea

ht) Canada

ASK M3B OF A RANDOMLY SELECTED 100 RESPONDENTS FOR EACH COUNTRY RATED AT M1t. ASK ONLY OF THOSE WHO SAY POSITIVE/NEGATIVE FOR EACH COUNTRY AT M1

M3B. You said you thought [COUNTRY] had a mostly [POSITIVE/NEGATIVE] influence in the world. Which of the following areas is most influential in making you feel that way about [COUNTRY]? **RECORD ONLY ONE ANSWER FOR EACH COUNTRY**

at) The United Kingdom

- 01 – Its foreign policy
- 02 – Its traditions and culture including arts, music and food
- 03 – The way it treats its people
- 04 – Its economy, products and services
- VOLUNTEERED (DO NOT READ)**
- 05 – OTHER (SPECIFY)
- 99 – DK/NA

bt) Russia

ct) India

dt) Iran

et) Brazil

ft) Pakistan

gt) Germany

ht) South Africa

it) South Korea

Background: Country-by-Country Results

The following sections examine in detail the poll results for each of the countries rated.

As well as being asked to rate each country, a small subsample of respondents (10% of the sample) in each country was asked to say which of four possible areas—foreign policy, economy/products/services, traditions and culture, and the way it treats its people—was most influential in their judgment of that country. When looked at in aggregate across all countries polled, the results to this question provide an indication of what some of the major factors shaping perceptions of each country may be.

United States

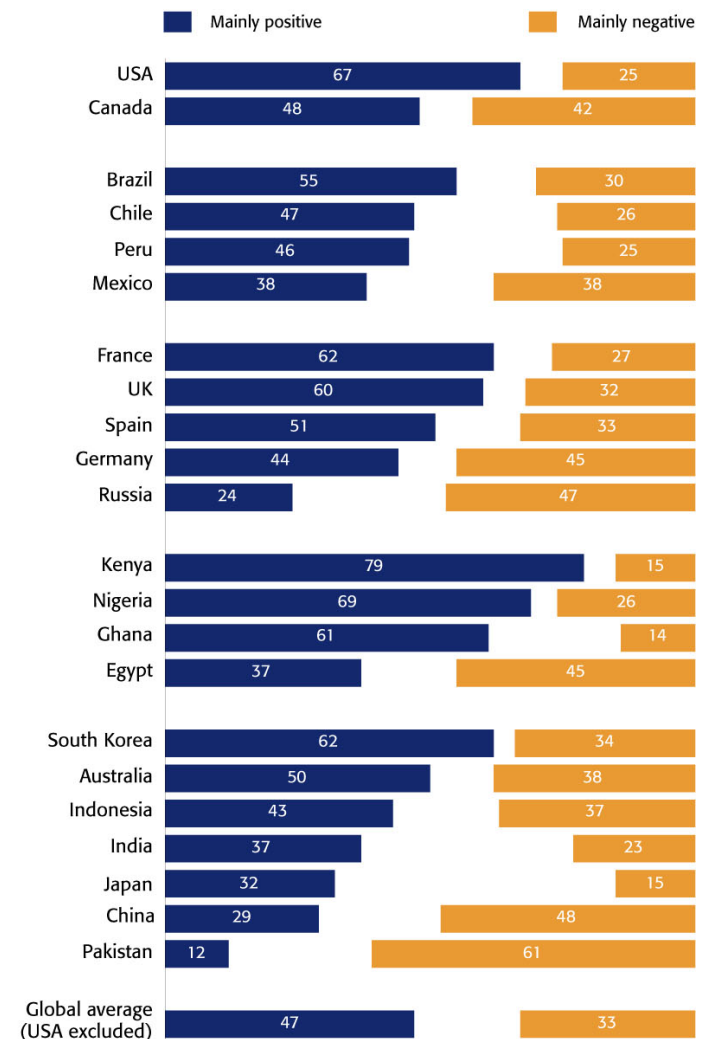
Overall, views of the US have deteriorated slightly in 2012, bringing a halt to the strong upward momentum observed from 2007 to 2011. In the 21 tracking countries¹ surveyed both in 2011 and 2012, 47 per cent of people on average have positive views of US influence in the world (48% in 2011), and 33 per cent hold negative views (up 2 points from 31% in 2011). Of the 22 countries surveyed in 2012, 16 countries hold positive views, four hold negative views, and two are divided.

The most favourable views are found in Kenya (79%, up 11 points) and Nigeria (69%)—but Nigerian views have declined sharply since 2011, with positive ratings dropping by 13 points while negative ratings have risen by 12 points.

In three of the four EU countries surveyed, views of US influence have improved markedly. Sixty-two per cent of French consider US influence in the world to be positive—the third highest percentage in the survey, tied with South Korea. At the same time, negative perceptions among the French have also reached a low point (27%, down 13 points from 2011). Trends are very similar in the UK and Spain, where views have shifted from being divided in 2011 to leaning strongly positive in 2012. Six in ten British respondents (60%, up 14 points since 2011) and 51 per cent of Spaniards (up 10 points) hold positive views of US influence. French, British, and Spanish positive views are now at the highest levels, and negative views at the lowest, since we began tracking this question in 2005.

Views of the United States' Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

¹ All quoted tracking averages exclude the views of the nation being rated about itself, where applicable.

Views in Germany have also improved, shifting from leaning negative in 2011 (37% positive vs 44% negative) to being divided in 2012 (44% vs 45%). The same pattern is found in Mexico, where the proportion of respondents with positive views of US influence has grown by 15 points to 38 per cent, so that Mexican opinion is divided overall (38% vs 38%). In Canada public opinion has shifted from leaning negative in 2011 (40% vs 47%) to leaning positive in 2012 (48% vs 42%).

South Koreans and Ghanaians are among those with the most favourable views of US influence in the world. However, in both these countries the overall perception of the US has deteriorated, with sharp drops in positive ratings (62%, down 12 points in South Korea; 61%, down 23 points in Ghana), and significant increases in negative views.

In the BRIC countries, there is a contrasting picture. Chinese opinion continues to be unfavourable, with a plurality of 48 per cent holding negative views. The proportion of negative views in Russia is similar (47%), but Russian views have shifted dramatically, from leaning positive in 2011 (38% positive vs 31% negative) to leaning strongly negative in 2012 (24% vs 47%). Indian views remain favourable, with a plurality of 37 per cent holding positive views, while a majority of Brazilians continues to give positive ratings (55%). However, Brazilian views have become much less favourable in 2012: positive ratings have decreased by nine points from 64 per cent, and negative ratings have increased by the same margin (30%, up from 21%).

As in Brazil, views in the other two Latin American countries surveyed have become less favourable. Positive views in Chile have decreased by 15 points to 47 per cent; in Peru, positive ratings have dropped seven points, to 46 per cent.

Factors shaping perceptions of the US

Of those who said the US influence in the world is positive, 38 per cent mention Washington's foreign policy as the reason to base their rating on, followed by the American economy, products, and services, cited by 30 per cent of respondents globally. For those holding negative views of US influence, the American foreign policy is also clearly the main reason that explains their negative rating, cited by 53 per cent of those polled.

China

Global views of China continue to improve in 2012, confirming the trend seen in 2011. On average, in the 21 tracking countries surveyed both in 2011 and 2012, 50 per cent of respondents hold positive views of China's influence, while 31 per cent hold negative views. This represents a substantial improvement since 2011, with positive views increasing by four points and negative views dropping four points as well. When we look by country we also see a strong overall improvement: of the 22 countries surveyed in 2012, 14 countries hold positive views and only five lean negative, while three are divided.

As in 2011, the Sub-Saharan countries surveyed give some of the most favourable ratings of China's influence in the world. Positive views remain very high and fairly stable in Nigeria (89%) and in Kenya (75%). However, the positive proportion has decreased significantly in Ghana (64%, down 8 points). Only in Pakistan is the proportion of positive views higher than in the Sub-Saharan countries: over three quarters of Pakistanis (76%) have favourable perceptions of Chinese influence in the world, and this percentage has increased by ten points since 2011.

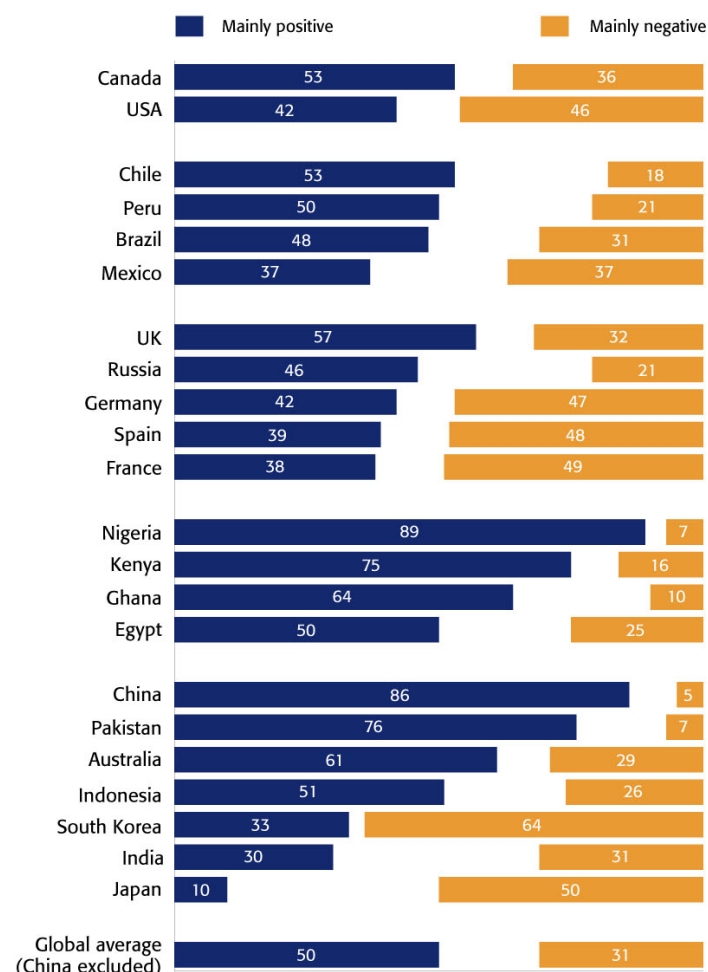
The improvement in perceptions of China among Western countries is striking. In Australia, Canada, Germany, the UK, and the US, the proportions holding positive views have never been so high since tracking began in 2005. In North America, Canadians have gone from leaning negative in 2011 (35% positive vs 49% negative) to leaning positive in 2012 (53% vs 36%). In the US, views of China's influence have improved significantly, shifting from leaning negative in 2011 (36% vs 51%) to being divided in 2012 (42% vs 46%). In Australia, opinion has improved from being divided in 2011 (43% vs 43%) to leaning strongly positive in 2012 (61% vs 29%).

In the EU countries surveyed, views have grown much warmer as well. Views of China have improved markedly in the UK, where the opinion has shifted from leaning negative (38% positive vs 48% negative in 2011) to leaning strongly positive in 2012 (57% vs 32%). In France, Germany, and Spain, while publics continue to hold negative views overall, these have dropped significantly (49% and 47% respectively, down 15 points each in France and Germany; 48%, down 9 points in Spain). The proportions holding positive views have grown strongly at the same time (38%, up 12 points in France; 42%, up 18 points in Germany; 39%, up 12 points in Spain).

In Mexico, views of China's influence have grown warmer as well: positive views have increased by 14 points to 37 per cent, while negative views have decreased from 42 to 37

Views of China's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

per cent, with the result that the country is now divided overall. In the other Latin American countries surveyed, perceptions are largely positive overall, but the proportions holding favourable views have declined in Chile (53%, down 8 points since 2011), Peru (50%, down 7 points), and Brazil (48%, down 7 points).

The trend is similar in Russia, where positive views have dropped six points (46%), and in Indonesia, where they have dropped 12 points (51%) while negative views have risen by eight points (to 26%). In India, views have sharply improved, as negative perceptions have dropped 21 points to 31 per cent, while favourable views have increased somewhat (30%, up 5 points), making the country's opinion divided overall. The most unfavourable views are found in China's close neighbouring countries. Sixty-four per cent of South Koreans have negative perceptions (up 11 points since 2011), and one in two Japanese respondents (50%) holds similarly negative views, compared to just one in ten with positive views.

Factors shaping perceptions of China (see note at top of page 7 for details)

Of those who said the Chinese influence in the world is positive, a majority of 51 per cent says it is because of China's economy, products, and services.

This area is also the top reason, mentioned by 30 per cent of respondents holding unfavourable views, why China is seen to have a negative influence. The way China treats its people (27%), as well as its foreign policy (25%) followed closely among reasons for this disapproval.

Japan

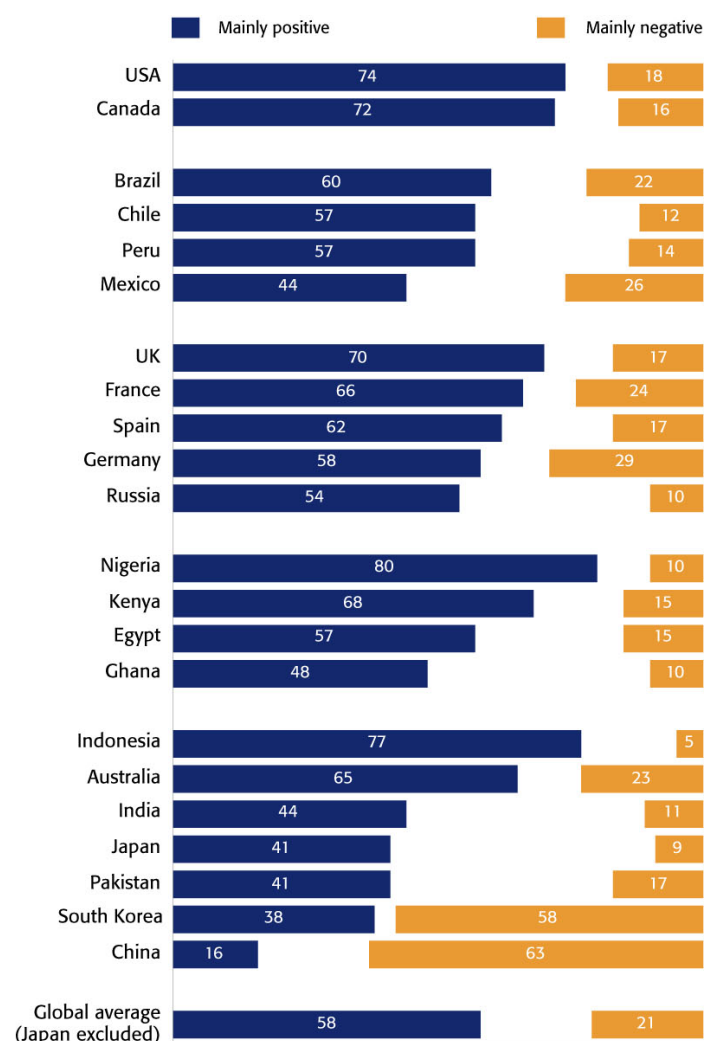
Japan is seen as having the most positive influence in the world among all countries evaluated, and views have improved slightly since 2011. On average, in the 21 tracking countries surveyed, 58 per cent of respondents hold positive views of Japan's influence (up from 56% in 2011), and 21 per cent hold negative views (up 1 point from 2011). This very favourable global picture is reflected in the picture by country: out of the 22 countries surveyed in 2012, 20 countries lean positive and only two lean negative (South Korea and China).

The most favourable views are found in Nigeria (80%, up 15 points) and Indonesia (77%)—but Indonesian views have cooled somewhat since 2011, with positive ratings dropping eight points. American and Canadian views, already very positive in 2011, have improved somewhat in 2012 (up 5 points in both countries, to 74% and 72% respectively).

In the EU countries surveyed, views of Japan's influence in the world are very positive overall. They have improved strongly in the UK and in France, where positive perceptions

Views of Japan's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "Do not know."
Asked of half of sample

have gone up sharply (up 12 points to 70% in the UK, up 11 points to 66% in France) while negative perceptions have slipped (down 5 points to 24% in France, down 9 points to 17% in the UK). Spanish positive views have also somewhat increased (62%, up 5 points), continuing the strong positive trend started in 2010. Views in Germany remain highly favourable and steady (58% positive vs 29% negative).

In Africa, respondents continue to rate Japan's influence largely positively. Increasing majorities of Kenyans (68%, up 7 points) and Egyptians (57%, up 5 points) have positive views. A plurality of Ghanaians leans the same way (48%), but this proportion has decreased by seven points since 2011.

In Latin America, all countries surveyed lean positive, but favourable perceptions have decreased in Brazil (60%, down 6 points), Chile (57%, down 9 points), and Peru (57%, down 7 points). Mexico is the only Latin American country surveyed where opinion has moved from negative to positive: positive views have surged from 24 per cent in 2011 to 44 per cent in 2012, while negative views have dropped eight points at the same time (to 26%).

In Russia, Japan's neighbour, respondents continue to give strong positive ratings to Japan's influence, though less so than in 2011 (54%, down 11 points). However, in two other neighbouring countries, China and South Korea, respondents have the most unfavourable views towards Japan in the survey. The Chinese continue to give the worst ratings, with only 16 per cent expressing positive views compared to 63 per cent with negative views—this negative proportion has, however, decreased by eight points since 2011. In South Korea, perceptions have changed radically, as South Koreans have gone from leaning strongly positive in 2011 (68% positive vs 20% negative) to leaning strongly negative in 2012 (38% vs 58%).

In the other Asian countries surveyed, perceptions of Japan's influence are overall positive. They are strongly positive and somewhat increasing in Australia (65%, up 5 points), and also in India (44%, up 5 points) and Pakistan (41%, up 7 points).

Factors shaping perceptions of Japan (see note at top of page 7 for details)

Of those who said the Japanese influence in the world is positive, a strong plurality of 47 per cent says it is because of Japan's economy, products, and services. Twenty-two per cent cite the Japanese traditions and culture.

For those holding negative views, the foreign policy of Japan is the most widely-cited reason that explains their negative rating, a view held by 36 per cent. The Japanese economy, products, and services is the second most-cited reason (20%), closely followed by the Japanese traditions and culture, and the way Japan treats its people (both 19%).

North Korea

Perceptions of North Korea's influence in the world remain strongly negative in 2012. However, a slight improvement is apparent in the aftermath of Kim Jong Il's death. In the 21 tracking countries surveyed both in 2011 and 2012, 50 per cent of respondents on average rate North Korea's influence negatively, with just 19 per cent rating it positively. Compared to 2011, negative views have gone down 4 points globally, while positive views have increased by three points. Of the 22 countries polled in 2012, 13 lean negative while only three lean positive, and six are divided.

As in 2011, the most unfavourable views are found in the neighbouring industrialized countries most closely affected by the nuclear threat from North Korea: Japan and South Korea. Over nine in ten South Koreans (91%) continue to hold negative views, and 88 per cent of Japanese feel the same—these proportions have remained fairly steady since 2011. The contrast is stark with attitudes in North Korea's other two neighbours, Russia and China—traditional allies of the regime of Pyongyang. Negative ratings of North Korean influence have dropped significantly among Russian and Chinese respondents in 2012 (35%, down 16 points in China; 21%, down 13 points in Russia), with those publics shifting from leaning negative in 2011 to being divided in 2012 (37% positive vs 35% negative in China; 25% vs 21% in Russia).

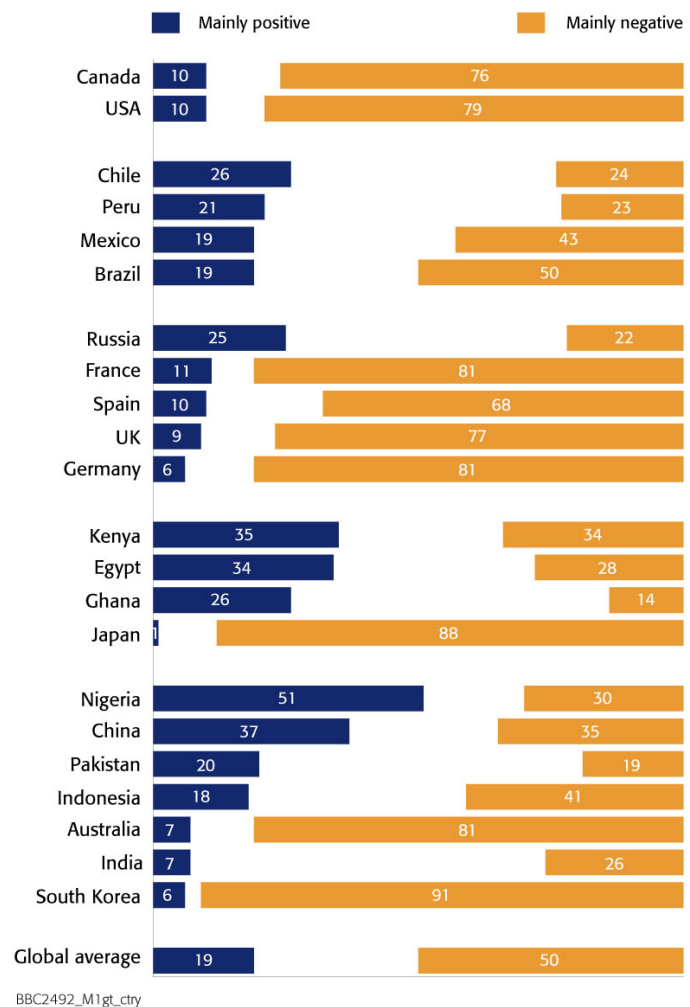
In all the EU countries surveyed, views remain relatively constant and very negative. Eighty-one per cent of Germans and French rate North Korea negatively in 2012, 77 per cent in the UK, and 68 per cent in Spain. In North America, a slight improvement is noticeable in perceptions of North Korea's influence, although overall views remain very negative (79%, down 7 points in the US; 76%, down 5 points in Canada). Australian attitudes are similar, with 81 per cent holding negative views, equal to the 2011 proportion.

Indonesian views of North Korea's influence have worsened, as positive views have decreased 14 points down to 18 per cent while negative views have remained fairly steady (41%). Indian views show a similar pattern, with positive views decreasing six points (down to 7%) and negative views increasing slightly (26%, up 5 points). In Pakistan, opinion has shifted, going from leaning negative in 2011 (11% positive vs 22% negative) to being divided in 2012 with positive views increasing by nine points (to 20% vs 19% negative). However, India and Pakistan are the countries with the highest proportions of respondents who are unable to give a rating (67% and 61%, respectively).

In Latin America, perceptions of North Korea's influence are split. Brazilians are the most negative, with 50 per cent of respondents reporting negative impressions (down 5 points

Views of North Korea's Influence

By Country, 2012



The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

since 2011). Mexicans also have strongly negative views (43%, up 15 points)—but this is balanced by a 13-point increase in positive views (to 19%). In the other Latin American countries surveyed, Peruvians have gone from leaning negative in 2011 (20% positive vs 29% negative) to being divided in 2012 (21% vs 23%), and Chile continues to be divided (26% vs 24%). However, both these countries have majorities who do not offer a rating.

Overall, Africa is the continent where perceptions of North Korea's influence are most favourable. Nigeria is the only surveyed country with a majority holds positive views (51%, up 22 points), and Nigerian opinion has shifted to being positive overall in 2012 after leaning negative in 2011. Opinion has shifted in the same way in Egypt, although the change is not so dramatic (24% positive vs 32% negative in 2011; 34% vs 28% in 2012). In Kenya, negative views have softened as well, and opinion has moved from leaning strongly negative in 2011 (21% vs 40%) to being divided in 2012 (35% vs 34%). Ghanaians continue to rate North Korea positively (26%), but the proportion who do not express an opinion has surged from 42 per cent in 2011 to 60 per cent in 2012.

Factors shaping perceptions of North Korea (see note at top of page 7 for details)

For those who held negative views of the North Korean influence in the world, the foreign policy of Pyongyang (41%), and the way the regime treats its people (34%) are the two main reasons that explains their negative rating.

Of those holding positive views, no clear reason stands out: 27 per cent mentioned its traditions and culture, 26 per cent its economy, and 23 per cent its foreign policy.

United Kingdom

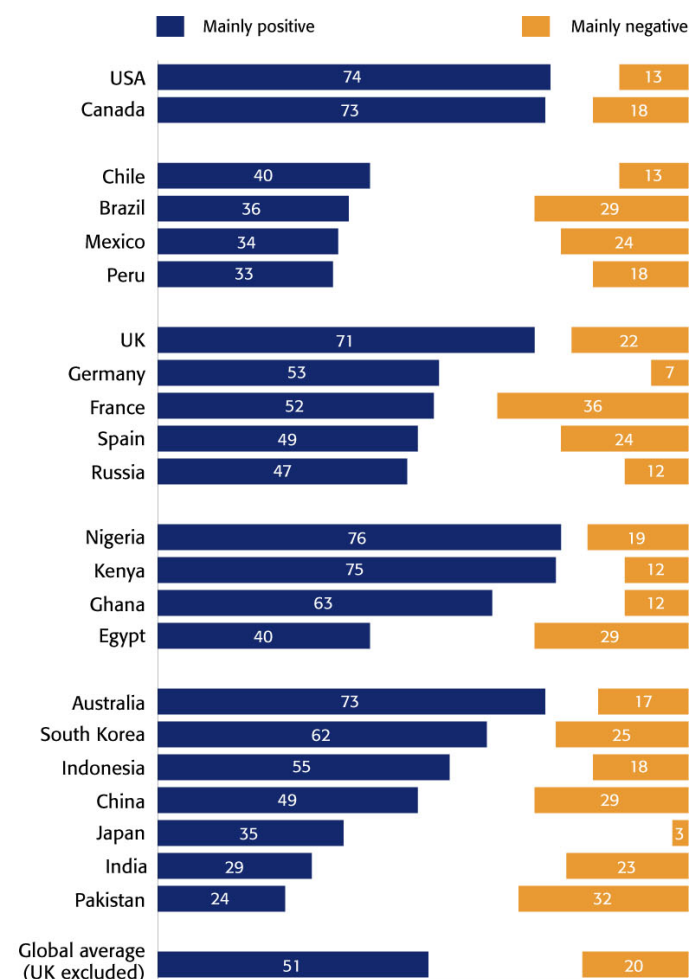
Globally, views of the United Kingdom have declined strongly since 2011. In the 21 tracking countries surveyed both in 2011 and 2012, 51 per cent of respondents on average say that British influence in the world is positive. This is markedly less than in 2011, when 57 per cent held this opinion. Over the same period, negative views have increased by four per cent, up to 20 per cent. However, at a country level, views continue to be positive in almost all countries. Of the 22 countries polled in 2012, 21 lean positive, and only Pakistan leans negative.

The most favourable views are found in Nigeria and Kenya, where three-quarters of respondents hold positive views (76% in Nigeria, slightly less than in 2011; 75% in Kenya, up 8 points). Views in former British colonies continue to be very positive as well, although opinion has cooled slightly in the US and in Australia (74% and 73%, down 6 points in each country). In Canada, 73 per cent rate the UK positively—a proportion similar to 2011.

In the BRIC countries, views have seriously declined since 2011 in India

Views of the United Kingdom's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

and Brazil, although positive views continue to be held by pluralities (36%, down 7 points in Brazil; 29%, down 11 points in India). In Russia and China, positive perceptions remain steady since 2011 (47% and 49%, respectively). Negative ratings have dropped eight points in China, to 29 per cent.

Aside from Brazil, views offered in Latin America continue to be positive, but trends differ from country to country. Positive perceptions have dropped 13 points in Chile, to 40 per cent. In Mexico, they have increased by eight points to 34 per cent, while negative ratings have fallen nine points to 24 per cent. As a result, Mexican opinion has shifted from leaning negative to leaning positive. In Peru, views have hardly changed since 2011, and a plurality of 33 per cent continues to rate British influence favourably.

Views of the United Kingdom among other EU countries surveyed continue to be largely favourable, but positive ratings have slipped significantly. They have dropped 14 points in both France and Germany (down to 52% and 53%, respectively)—and negative perceptions have also increased by 12 points in France, to reach 36 per cent. This decline is less dramatic in Spain, where positive views have only decreased by six points, down to 49 per cent. A softening in favourable perceptions of the UK's influence in the world is also apparent in the other two African countries surveyed, Ghana and Egypt. In these two countries, positive ratings have fallen by 12 points (to 63% and 40%, respectively), while negative ratings have increased by seven points in Ghana (12%) and by 19 points in Egypt (29%).

A similar evolution—continuation of strong favourable views overall but with a clear decline in positive ratings—is apparent in South Korea (62%, down 23 points), Indonesia (55%, down 14 points), and India (29% down 11 points). Perceptions remain very stable among the Japanese (35% positive vs 3% negative), but Japan is the country with the largest proportion of respondents unable to give a rating. Pakistan is the only country with a plurality leaning negative (32%), but overall attitudes have grown warmer there, with positive ratings going up ten points since 2011 (24%).

Factors shaping perceptions of the UK (see note at top of page 7 for details)

Of those who said the UK influence in the world is positive, 35 per cent mention British foreign policy as the reason explaining their rating. Twenty-three per cent mention the British economy, products, and services, and 22 per cent Britain's traditions and culture.

Foreign policy is also the most widely cited factor among those holding negative views to justify their rating, mentioned by 41 per cent. It is followed by the way Britain treats its people (21%).

Pakistan

Views of Pakistan remain strongly negative in 2012. However, a slight improvement is apparent, as the proportion of negative ratings has decreased significantly at the global level. On average, 51 per cent of respondents in the 21 tracking countries surveyed both in 2011 and 2012 offer an unfavourable view of Pakistan's influence, compared to 55 per cent in 2011. Sixteen per cent rate Pakistan positively, a proportion identical to last year's. The spread by country continues to demonstrate how unfavourable opinion is towards Pakistan overall. Of the 22 countries surveyed in 2012, 20 lean negative, one leans positive (Indonesia), and one is divided (Kenya).

The most unfavourable views are all found in Western countries. Stable proportions of Americans (75%) and Canadians (69%) say Pakistan's influence in the world is mainly negative. A very similar and also steady percentage is seen in Australia (72%). The pattern is no different in the EU countries surveyed, with negative proportions approaching 75 per cent in France (74%) and the UK (73%, up 5 points). However, negative perceptions have slipped a few points in Germany (67%, down 9 points) and in Spain (66%, down 6 points).

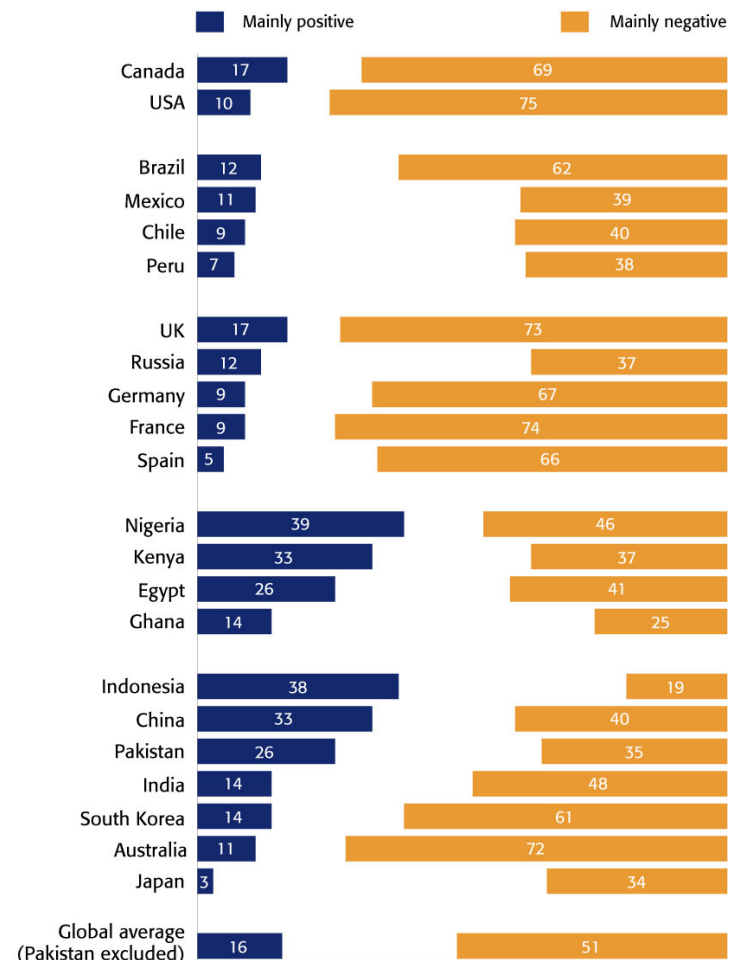
South Koreans continue to hold very negative views (61% negative), while the proportion of respondents with positive views has fallen even lower than in 2011 (14%, down 7 points). Attitudes in Japan remain negative (3% positive vs 34% negative), but as is often the case in Japan, a very high proportion do not give any clear rating (63%, the highest proportion in the survey).

In Latin America, respondents rate Pakistan negatively as well. Brazilians are the most unfavourable (62%), although their negative ratings have decreased by 13 points since 2011. Chileans and Peruvians give very similar ratings (9% positive vs 40% negative in Chile; 7% vs 38% in Peru). In Mexico positive opinion has declined strongly since 2011. Negative views have gone up by nine points (to 39%) while positive ratings have dropped 18 points (to 11%). As a result, Mexico has gone from being divided in 2011 to leaning negative in 2012.

In India, Pakistan's neighbour and long-standing political enemy, overall attitudes continue to be very unfavourable (14% vs 48%), but negative views have clearly eased, as the proportion with unfavourable views has dropped 20 points since 2011. China's hostile feelings towards Pakistan's influence in the world have also mollified somewhat (40%, down 7 points), while positive views have remained quite stable (33%).

Views of Pakistan's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA."
Asked of half of sample

In Africa, attitudes towards Pakistan are not as unfavourable as in the countries surveyed in other regions. But trends diverge at the country level. In Nigeria, views remain unfavourable (46% negative), but overall opinion is softened by a 23-point increase in positive ratings (to 39%, highest percentage in the survey). Kenya is the second country, along with Mexico, where perceptions have shifted strongly, but in a more favourable way: as negative views have decreased (37%, down 5 points) and positive views have remained stable, the country has gone from leaning negative in 2011 to being divided in 2011 (33% positive vs 37% negative). Negative feelings have also decreased greatly among Ghanaians (25%, down 24 points), but this involves an increase in undecided respondents (61%, second highest percentage in the survey) rather than any strong increase in positive feeling (14%, up 5 points only).

Indonesia is the only country where a plurality (38%) holds favourable views about Pakistan, and overall perceptions have even improved since 2011, with the proportion that have negative feelings decreasing by nine points (to 19%).

It is very noteworthy that Pakistanis are the only country that rates its own influence in the world negatively. The shift in opinion is quite dramatic, with positive self-ratings dropping 14 points (to 26%) while negative self-ratings have increased 18 points (to 35%).

Factors shaping perceptions of Pakistan (see note at top of page 7 for details)

For those who held negative views of Pakistan's influence in the world, the foreign policy of Islamabad, and the way the country treats its people are the two main reasons that explain their negative rating (34% and 32%, respectively).

Pakistani traditions and culture is the top reason why 33 per cent of those holding positive views do so, followed by the government's foreign policy (24%).

India

Globally, in 2012, views of India remain similar to what they were in 2011, and are positive overall. Among the 21 tracking countries surveyed both in 2011 and 2012, 40 per cent of people have favourable views of Indian influence in the world (the same proportion as in 2011), while 27 per cent give negative ratings (down 1 point since 2011). Of the 22 countries polled, 14 lean positive, two lean negative, and six are divided.

The most positive views are found in Nigeria (63%, up 6 points since 2011—although matched by a similar increase in negative ratings from 20 to 27%). Most Anglo-Saxon countries also give positive ratings: 56 per cent of Britons (up 6 points) and Americans, 53 per cent of Canadians—however, negative views have gone up by nine points in Canada (to 31%). Australia stands somewhat apart from these favourable attitudes, as respondents there remain divided (44% positive vs 40% negative), as they were in 2011.

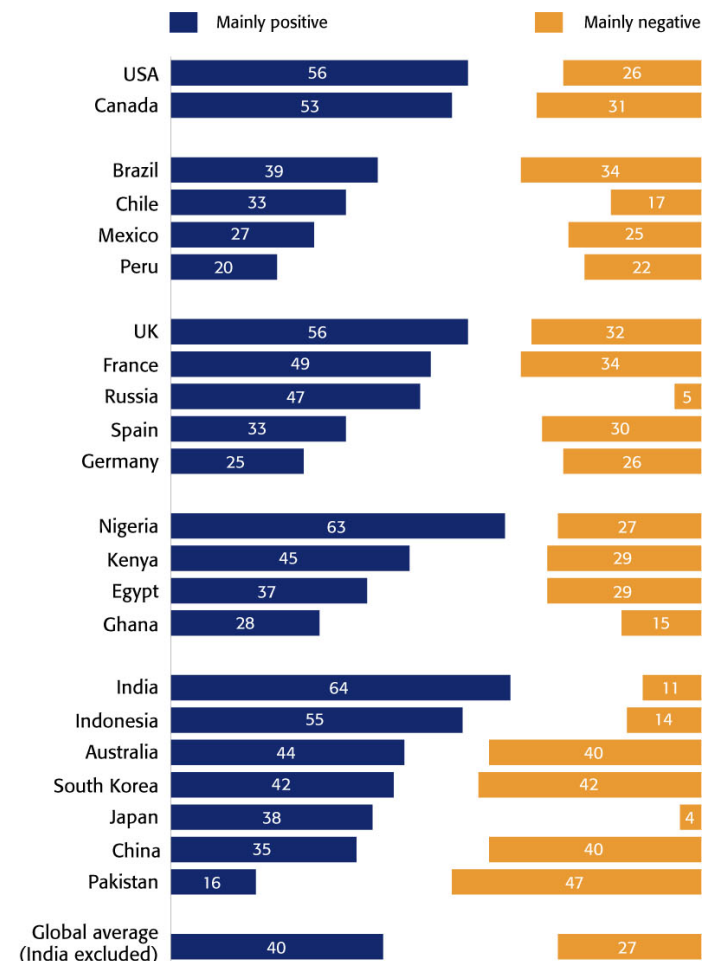
Indonesians and Japanese continue to lean positively towards India, and increasingly so. Views in Indonesia have become much warmer than in 2011, as positive ratings have risen 13 points to 55 per cent while negative views have dropped 12 points, to 14 per cent. In Japan, 38 per cent have positive feelings about Indian influence, up seven points since last year.

In neighbouring Pakistan, with which India has long had difficult relations, the picture has deteriorated and is by far the least favourable among all countries surveyed. A strong plurality of 47 per cent has unfavourable views (up 8 points since 2011, and the highest percentage of negative ratings in the survey), while only 15 per cent view India's influence favourably (stable since 2011). In China, opinion has become slightly cooler, with the proportion of positive ratings somewhat decreasing (35%, down 5 points) and the overall balance of opinion shifting from being divided in 2011 to leaning slightly negative in 2012 (35% vs 40%). However, the most dramatic shift is seen in South Korea, where a 24-point drop in positive ratings (42%) is matched by a 20-point rise in negative views (to 42%). This means that South Korea's opinion of India's influence has gone from leaning strongly positive to being divided.

In India's two other BRIC competitors, attitudes have slightly improved. In Brazil, opinion leans somewhat positive (39% positive vs 34% negative), a shift from being perfectly divided in 2011 (37% vs 37%). In Russia, a traditional geopolitical ally of India, opinion holds steady and largely positive (47% vs 5%).

Views of India's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

Unlike in Brazil, the attitudes of respondents from other Latin American countries surveyed have mostly worsened. Chileans are still positive overall, but the proportion of positive ratings has decreased significantly and slipped down ten points to 33 per cent. Positive opinion has dropped eight points in Mexico, down to 25 per cent, shifting opinion from leaning positive in 2011 (35% positive vs 24% negative) to divided (27% vs 24%). Peruvians continue to be split, with fairly equal proportions of positive and negative ratings (20% vs 22%). Peruvians, with Japanese, are the most likely not to state a clear stance on the question (58% in each country).

Apart from the UK, the picture in the EU countries surveyed differs from country to country. Views have improved in France and Spain. With a 10-point increase in positive ratings and a 15-point decrease in negative ratings, French opinion has shifted from leaning negative in 2011 (39% positive vs 49% negative) to leaning positive in 2012 (49% vs 34%). In Spain, the proportion holding negative views has fallen 11 points (to 30%) with the result that opinion has shifted from leaning negative to being divided (33% positive vs 30% negative in 2012). The public in Germany continues to be divided (25% vs 26%), but drops in positive and negative responses have led to an increased proportion of respondents unable to give a clear rating (49%, up 16 points).

In Kenya, Egypt, and Ghana, views remain positive and fairly stable since 2011, with pluralities of 45, 37, and 28 per cent respectively giving India's influence a positive rating.

Factors shaping perceptions of India (see note at top of page 7 for details)

Of those who said the Indian influence in the world is positive, a strong plurality of 48 per cent says it is because of India's traditions and culture, followed by 19 per cent who mention its economy, products and services.

The way India treats its people is mentioned by 29 per cent of respondents holding negative views, followed by Indian traditions and culture, cited by a quarter of respondents (25%).

France

Views of France's influence in the world have declined sharply in 2012, although they remain largely positive overall. In the 21 tracking countries surveyed both in 2011 and 2012, 48 per cent of respondents on average say that French influence in the world is positive. This is markedly less than in 2011, when 52 per cent held this opinion. At the same time, negative views have gone up by five per cent, to 22 per cent. At a country level, views continue to be positive in almost all countries. Of the 22 countries polled in 2012, 20 lean positive, one leans negative (Pakistan), and one is divided (India).

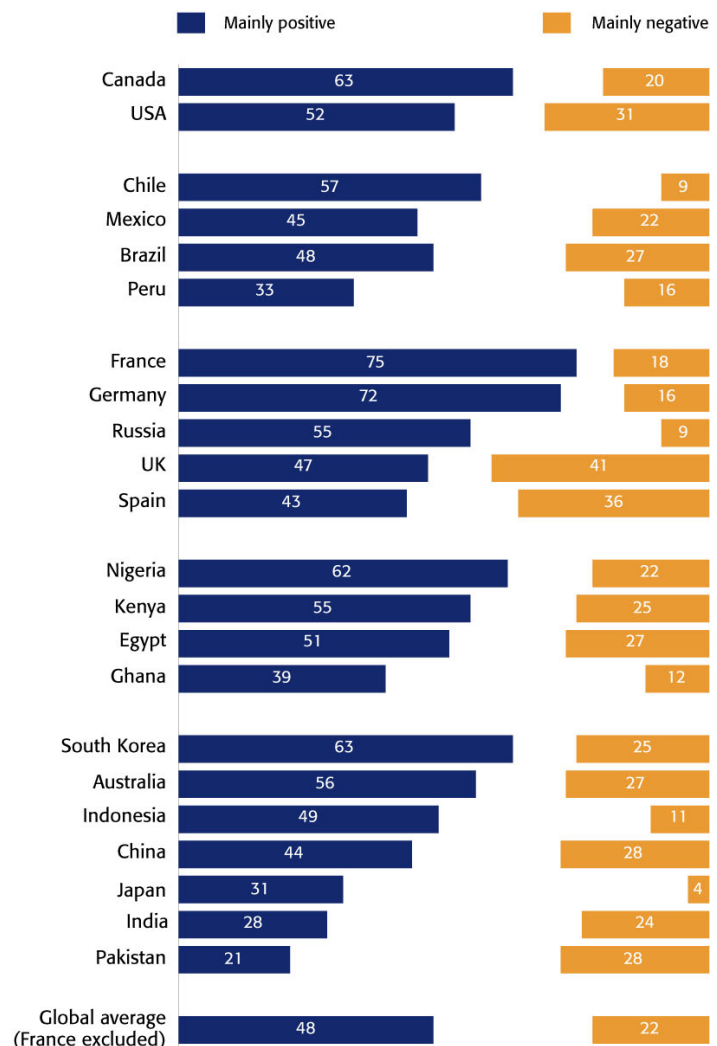
The most favourable ratings are given by neighbouring Germany and by Canada. Positive views have increased by ten points in Germany (to 72%) and seven points in Canada (63%). Canadians appears to buck the trend observed in other Anglo-Saxon countries, where views of France's influence are cooling. Even though there is still a majority with positive feelings in Australia (56%) and in the US (52%), negative ratings are increasing in these two countries (27%, up 7 points in Australia; 31%, up 6 points in the US). This deterioration is much more apparent in the UK: only a plurality of 47 per cent has favourable perceptions of French influence in 2012 (down 7 points since 2011), while 41 per cent hold negative views (up 12 points). The trend observed in Spain is very similar, characterised by a drop in positive ratings (43%, down 7 points) and a strong increase in negative perceptions (36%, up 12 points).

Attitudes towards France remain quite favourable in most of the BRIC countries. The Russians continued to be the most favourable, with 55 per cent giving positive ratings—a figure in line with 2011. In Brazil and China, the publics' positive perceptions also remain steady: 48 per cent of Brazilians and 44 per cent of Chinese think well of France's influence, figures in line with 2011. At the same time, negative views have dropped ten points (to 28%) among Chinese, which reinforces the overall positive picture. India is the only BRIC country where views of France have grown worse: opinion shifted from leaning positive in 2011 (37% positive vs 21% negative) to being divided in 2012 (28% vs 24%), following a 9-point drop in positive ratings since 2011.

All the African countries surveyed continue to offer strongly positive views of France's influence in the world: 62 per cent positive in Nigeria, 51 per cent in Egypt, 39 per cent in Ghana. However, positive feelings have strongly decreased among Ghanaians (down 23 points), and have also softened among Nigerians (positive ratings down 6 points, negative

Views of France's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

ratings up 13 points to 22%). Kenya is the only African country where overall perceptions have improved, thanks to an increase in positive ratings (55%, up 9 points since 2011).

As in Brazil, feelings among respondents in Mexico and Peru have remained fairly steady since 2011, with pluralities of 45 and 33 per cent respectively giving positive ratings. In Chile, a majority of 57 per cent leans the same way, but this figure has decreased by nine points since 2011. A similar drop has taken place in Indonesia, where only 49 per cent feel positive in 2012, compared with 60 per cent in 2011. This cooling was also significant among South Koreans, although a strong majority (63%) continues to hold positive views—this is down 19 points from 2011, while negative ratings have shot up 18 points. In Japan, positive views remain constant at 31 per cent.

Pakistan is the only country to rate France negatively in 2012. Positive views remain identical to 2011 (21%), but negative ratings have increased by nine points, to 28 per cent. Pakistani opinion has shifted from being divided to leaning negative.

Factors shaping perceptions of France (see note at top of page 7 for details)

Of those who said France's influence in the world is positive, 37 per cent mention French traditions and culture as the top reason explaining their rating, and 28 per cent mention France's foreign policy.

As for those who held negative views, foreign policy is the most commonly cited justification for their negative rating, by 40 per cent. French traditions and culture is the second placed reason, cited by 22 per cent.

South Africa

Views of South Africa have cooled globally in 2012, and the positive trend observed since 2009 has ended. On average, in the 22 tracking countries surveyed both in 2011 and 2012, 37 per cent of respondents have positive views of South African influence in the world. This is four points less than in 2011. One-quarter of respondents (25%) hold negative views, in line with the 2011 figure (26%). Of the 22 countries surveyed in 2012, 14 countries lean positive, three lean negative, and five are divided.

As in 2011, the most favourable views are found in the surveyed Sub-Saharan countries. In Nigeria, 72 per cent rate South Africa positively, followed by Kenya (66%, but down 7 points since 2011), and Ghana (55%). Egypt bucks this positive trend among African countries: the proportion of Egyptians who give positive ratings to South Africa's influence has fallen eight points (to 32%) while negative ratings have gone up 19 points (to 32%); as a result, Egyptian opinion on this issue is now divided.

In North America, perceptions remain stable and favourable, confirming the strong improvement already observed in 2011: 49 per cent of Americans, and 46 per cent of Canadians, rate South African influence positively in 2012.

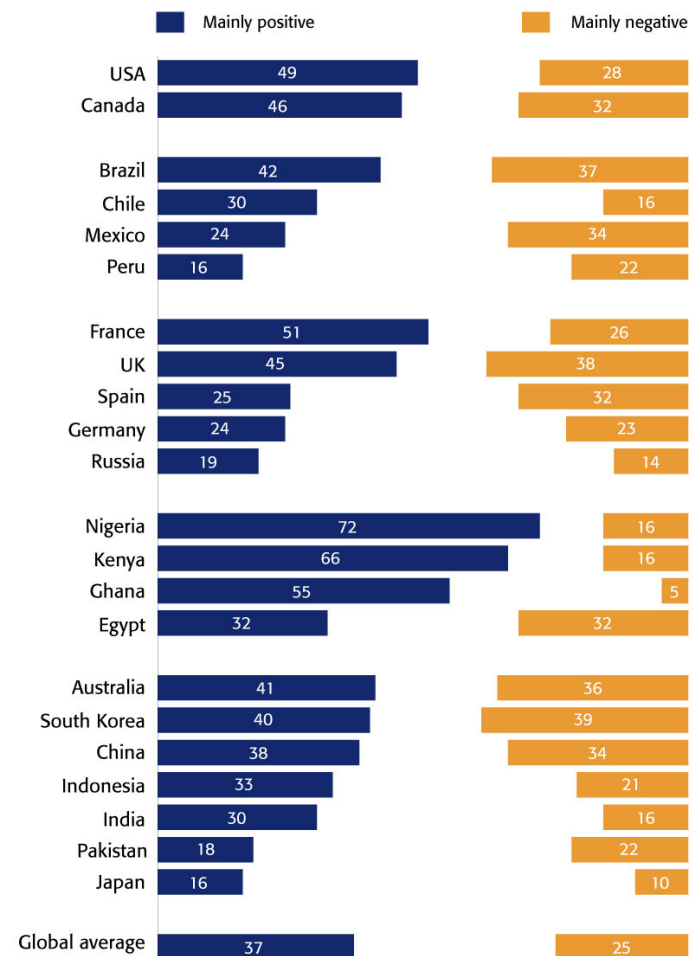
Within the BRIC countries, India and Brazil continue to hold favourable and relatively steady views of South Africa. Brazilians lean slightly positive (42% vs 37%), while a plurality of 30 per cent of Indians has a positive opinion too—a very high proportion of Indians, however, are unable to give a proper rating (54%). In Russia, two-thirds of respondents (67%) have no opinion on the question, the highest percentage in the survey. The rest of Russian opinion is somewhat positive (19% positive vs 14% negative). In China, the public continues to be divided (38% vs 34%).

In the EU countries surveyed, views of South Africa are diverse. The French are the most positive, with 51 per cent leaning favourably and only 26 per cent giving negative ratings (down 6 points since 2011). In the UK, opinion has shifted from being divided in 2011 (43% positive vs 42% negative) to leaning positive in 2012 (45% vs 38%). Perceptions have also improved among Germans, who have gone from leaning negative last year (28% vs 40%) to being divided this year (24% vs 23%)—this reflects a 17-point fall in the proportion of negative ratings. Following a 10-point drop in positive views, Spanish opinion has also shifted, going from being divided in 2011 (35% vs 36%) to leaning negative in 2012 (25% vs 32%).

In Latin America, a dramatic shift has occurred in Mexico, where the proportion offering positive ratings has fallen by half since 2011 (24%, down from 48%), while the percentage

Views of South Africa's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

offering negative ratings doubled at the same time (34%, up from 17%), resulting in the country leaning strongly negative in 2012. Opinion in Peru has also shifted, moving from being divided in 2011 to leaning negative in 2012 (16% positive vs 22% negative), following a 7-point drop in positive ratings. However, 63 per cent of Peruvians are unable to offer an opinion. The proportion of respondents without an opinion also increased greatly in Chile (54%, up 20 points), leaving a plurality of 30 per cent with positive perceptions (down 13 points), and 16 per cent (down 7 points) with negative feelings.

In Asia, attitudes towards South African influence remain fairly stable in India (30% positive vs 16% negative) and in Indonesia (33% vs 21%). Sixteen per cent of Japanese respondents have favourable views, and ten per cent hold negative perceptions. Pakistanis respondents remain divided (18% vs 22%). In Japan and Pakistan respectively three-quarters (73%) and 61 per cent of respondents offer no rating on how they perceive South Africa's influence in the world. Despite leaning positive in 2011, views among South Koreans have cooled significantly, with opinion shifting to divided following a strong drop in positive ratings (40%, down 14 points) and a 6-point rise in negative views (to 39%). Australia is the only country surveyed in Asia where views have improved since 2011. Following a 7-point decrease in negative ratings (36%), the public has gone from being divided to leaning slightly positive in 2012 (41% vs 36%).

Factors shaping perceptions of South Africa (see note at top of page 7 for details)

For those who held positive views of South Africa's influence in the world, 31 per cent mentioned the traditions and culture as the main reason explaining their positive rating.

South Africa's foreign policy was the second-placed reason, cited by 23 per cent.

Of those holding negative views, the way South Africa treats its people was cited by three in ten respondents (30%) to justify their negative rating. South Africa's foreign policy was also the second-placed reason (23%), but closely followed by the South African traditions and culture, and the country's economy (both 20%).

Israel

Evaluations of Israel's influence in the world—already largely unfavourable in 2011—have worsened in 2012. On average, in the 22 tracking countries surveyed both in 2011 and 2012, 50 per cent of respondents have negative views of Israel's influence in the world, an increase of three points from 2011. The proportion of respondents giving Israel a favourable rating remains stable, at 21 per cent. Out of 22 countries polled in 2011, 17 lean negative, three lean positive, and two are divided.

In the Western countries surveyed, views of Israel show improvement only in the US. Fifty per cent of Americans have a favourable view of Israel in 2012, and this proportion has increased by seven points. At the same time, the proportion of negative ratings has gone down six points to 35 per cent and, as a result, the US has gone from being divided in 2011 to leaning positive in 2012. These are the most positive views on Israel's influence expressed in the US since tracking began in 2005. Apart from the US, the most favourable views of Israel are found in Nigeria and Kenya, where views have also shifted since 2011. A majority of 54 per cent of Nigerians (up 23 points) rates Israel positively, and the country has moved from being divided to leaning positive in 2012 (54% positive vs 29% negative). In Kenya, negative ratings have fallen ten points (to 31%), while positive views have risen by 16 points (to 45%), shifting the country from leaning negative in 2011 to leaning positive in 2012.

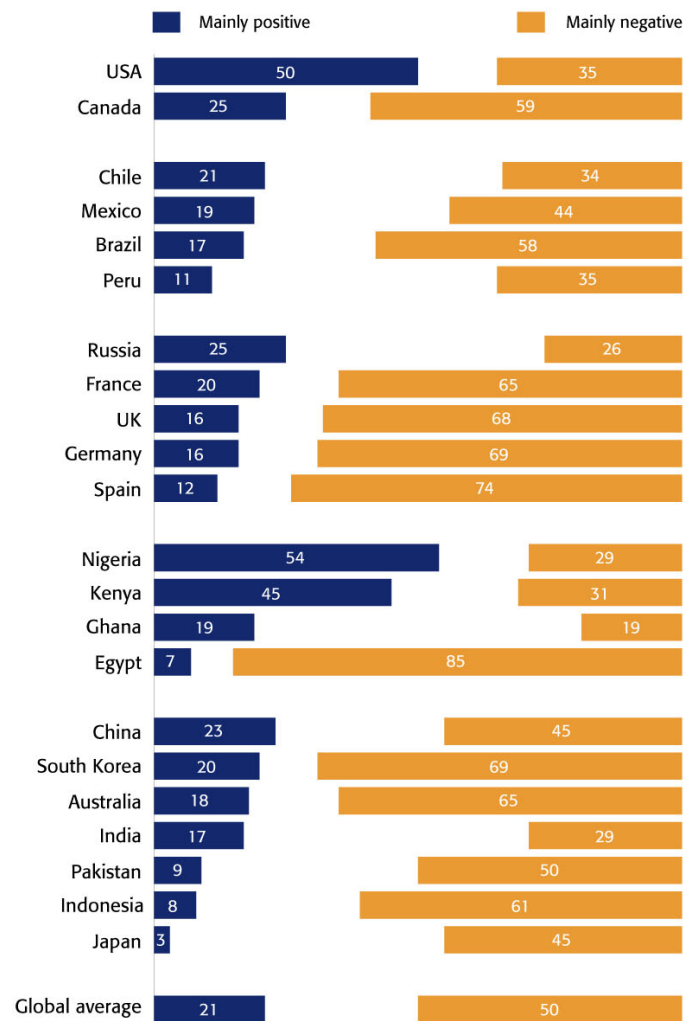
Among the Muslim countries surveyed, perceptions of Israel have deteriorated in Egypt (85% negative ratings, up 7 points and the highest negative percentage in the survey), and remained largely negative but stable in Pakistan (9% positive vs 50% negative) and in Indonesia (8% vs 61%).

In the EU countries surveyed, views of Israeli influence have hardened in Spain (74% negative ratings, up 8 points) and in France (65%, up 9 points)—while positive ratings remain low and steady. Negative ratings from the Germans and the British remain very high and stable (69% and 68%, respectively). In other Anglo-Saxon countries, views have worsened in Australia (65% negative ratings, up 7 points) and in Canada (59%, up 7 points). This hardening of opinion towards Israel's influence in the world is strongly apparent in South Korea, where negative views have risen (69%, up 15 points) while positive views have decreased by 11 points (to 20%).

Negative attitudes have also increased among the Chinese, the Indians, and the Russians. In China, a 9-point drop in positive ratings (to 23%) makes the overall balance of views even more negative (23% positive vs 45% negative). In India, negative perceptions have gone up

Views of Israel's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

11 points (to 29%), and overall opinion has shifted from being divided in 2011 (21% vs 18%) to leaning negative in 2012 (17% vs 29%). In Russia, public opinion has shifted from leaning positive in 2011 to being divided in 2012 (25% positive vs 26% negative).

In Ghana, favourable views have fallen by 13 points while negative views have decreased by eight points, and the country has shifted from leaning somewhat positive in 2011 (32% positive vs 27% negative) to being divided in 2012 (19% vs 19%). Over six in ten Ghanaians (62%, up 20 points) do not give a rating, the highest percentage in the survey.

In Latin America, perceptions are negative overall, with pluralities giving negative ratings in Chile (34%, stable), Peru (35%, stable), and Mexico (44%, up 15 points). Brazilians continue to be strongly unfavourable to Israel's influence, with a stable majority of 58 per cent who rate it negatively.

Factors shaping perceptions of Israel (see note at top of page 7 for details)

For those who held negative views of Israel influence in the world, the foreign policy of the Israeli State is by some distance the main reason explaining their negative rating (45%). The way Israel treats its own people stands out as the second most important reason (27%). Of those holding positive views, Jewish traditions and culture are cited by 29 per cent globally, closely followed by foreign policy (26%).

Canada

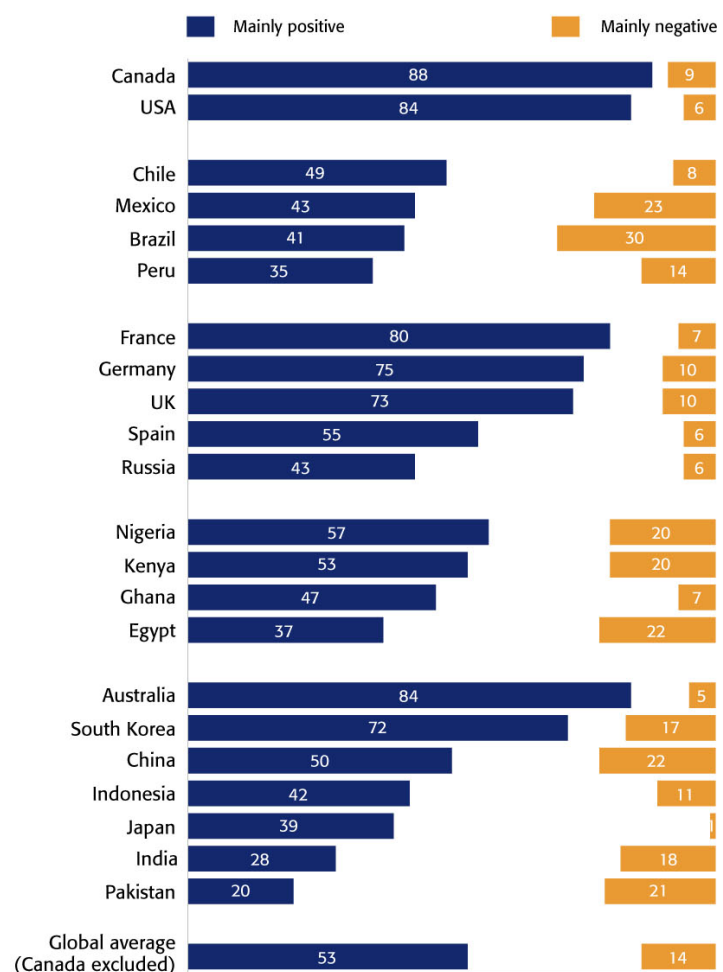
After a strong increase in favourable perceptions in 2011, views of Canada have dipped a little in 2012. In the 21 tracking countries surveyed both in 2011 and 2012, 53 per cent of people on average have positive views of Canadian influence in the world (54% in 2011), and 14 per cent hold negative views (up 2 points since 2011). However, the spread by country reveals great reputational strength. Of the 22 countries surveyed in 2012, all lean positive about Canada's influence, except Pakistan, where the opinion remains divided (20% positive vs 21% negative), as in 2011.

The most favourable views about Canada are found in the US and Australia (both 84% positive, the highest percentages in the survey). In the EU, the French (80%), the Germans (75%), and the British (73%) are the next most favourable respondents. In all these countries, perceptions of Canada's influence have remained stable since 2011.

In South Korea, a country where positive ratings reached 84 per cent in 2011, perceptions have moderated in 2012. Seventy-two per cent of South Koreans have

Views of Canada's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

favourable perceptions in 2012, and the proportion of those holding negative views has gone up by 12 points (to 17%).

Public opinion has become less positive in most of the BRIC countries, but large pluralities still report favourable attitudes. Positive ratings have gone down eight points in Russia (to 43%), six points in China (50%), and seven points in Brazil (41%)—in Brazil, unfavourable views have also increased seven points (30%). In India, ratings remain fairly stable (28% positive vs 18% negative), with a majority of respondents not offering a clear opinion (54%). Opinions has also softened in a few other countries, including Ghana (47% positive ratings, down 15 points), Chile (49%, down 11 points), Nigeria (57% positive vs 20% negative, but with negative ratings up 12 points), and Mexico, where positive ratings have dropped seven points (to 43%), and negative ratings have increased by nine points (23%).

Views have barely moved in several other countries, where comfortable pluralities continue to hold positive feelings about Canada's influence in the world: Spain (55%), Japan (39%), Egypt (37%), and Peru (35%).

Kenya is the only country (apart from Canada itself) where the proportion of positive views has increased significantly. Fifty-three per cent of Kenyans rate Canada positively in 2012, a 14-point increase since 2011. Views in Indonesia have also improved, as negative ratings have dropped eight points while favourable perceptions remain stable (42% positive vs 11% negative).

Factors shaping perceptions of Canada (see note at top of page 7 for details)

No dominant reason was particularly singled out by those who said the Canadian influence in the world is positive. A quarter mentioned the foreign policy of Canada (25%), but this was closely followed by Canada's economy (24%), the way it treats its people (23%), and its traditions and culture (22%).

For the very few holding negative views, the most frequently given reason, the foreign policy of Ottawa, was cited by 33 per cent. Canadian traditions and culture, the second placed reason, was mentioned by 23 per cent.

The European Union

The EU's global influence rating has sharply deteriorated in 2012. On average, 48 per cent of respondents in the 22 tracking countries surveyed in 2011 and 2012 have positive views about the Union, a steep drop of eight points in the past year. At the same time, negative perceptions have increased by eight points to reach 25 per cent. Of the 22 countries surveyed in 2012, 17 lean positive, one leans negative (Pakistan), and four are divided.

Within the EU itself, all surveyed countries continue to hold favourable views of the Union, except one member outside the Eurozone: the UK. For the first time since tracking began, the British appear to be divided on how they perceive the influence of the EU: 46 per cent hold positive views, but the same proportion leans negative (the lowest and highest percentages, respectively, since 2006). Despite the severe difficulties that the monetary union faced throughout 2011, Eurozone members Germany and France continue to be the most favourable towards the EU of all countries surveyed, reporting very high and stable positive ratings (73% and 67%, respectively), closely followed by Spain (65%).

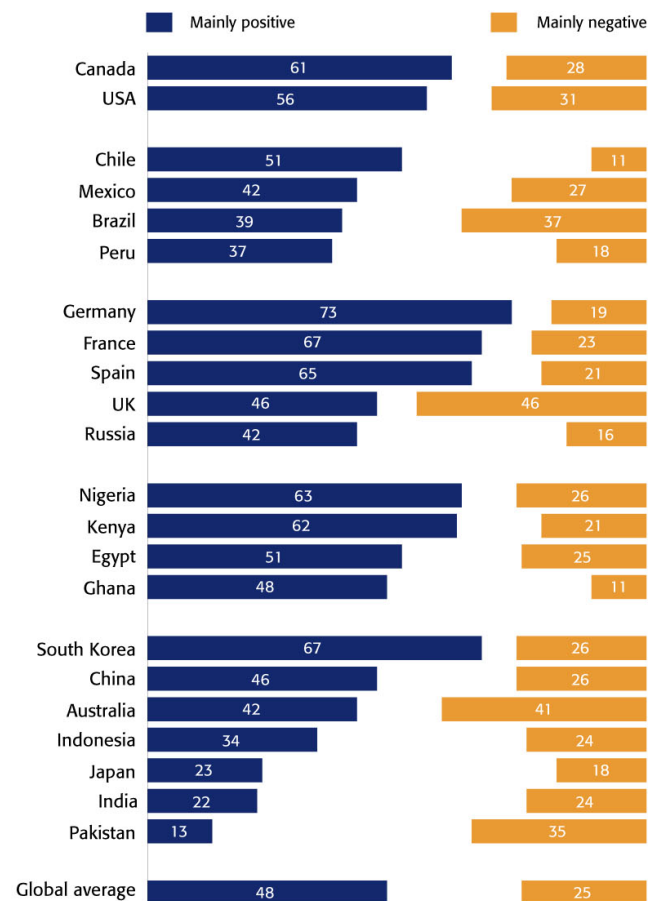
In North America, the EU continues to enjoy strong favourable ratings, but overall perceptions are slipping. In Canada, positive ratings have decreased by nine points (to 61%), and negative ratings have risen by 16 points (28%). In the US, respondents rate the EU less positively (56%, down 5 points), while the proportion rating it negatively has increased by ten points (31%). Despite being favourable overall, South Korean attitudes are softening—positive ratings have decreased by 17 points (67%), and negative ratings have gone up 19 points (26%).

In the BRIC countries, perceptions of the EU are changing quite significantly in Brazil and India. As positive ratings have dropped while negative ratings have risen, Brazilian and Indian opinion has shifted from leaning positive in 2011 (47% positive vs 27% negative in Brazil; 34% vs 14% in India) to being divided in 2012 (39% vs 37% in Brazil; 22% vs 24% in India). In Russia, the solid majority of 55 per cent that held positive views in 2011 has slipped to a plurality of just 42 per cent in 2012. In China, overall attitudes remain positive (46% vs 26%) and steady, with a 7-point drop in negative ratings being nearly matched by a 5-point drop in positive ratings.

In the Muslim world, views vary. They have declined among Indonesians, with a 20-point drop in positive ratings, but this most populous Muslim country remains positive overall (34% vs 24%). In Pakistan—the only country to lean negative—perceptions have declined, with a plurality of 35 per cent holding negative views (29% in 2011), and a meagre but stable 13 per cent holding favourable views. In Egypt, favourable views have strengthened, with an 11-point rise in positive ratings (51%).

Views of the European Union's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

In Latin America, views in Chile, Mexico, and Peru have not changed as dramatically as they have in Brazil, and continue to be favourable overall. However, the proportion of positive views has decreased significantly in these three countries (51%, down 18 points in Chile; 42%, down 9 points in Mexico; 37%, down 9 points in Peru). Views in Mexico are further aggravated by a 10-point increase in negative ratings.

In the Sub-Saharan countries, views have deteriorated sharply in Ghana, where positive ratings have dropped 26 points (to 48%). However, this drop has not translated into a matching increase in negative ratings (11% and fairly stable). In Nigeria and Kenya, unfavourable attitudes are growing more common (26%, up 12 points in Nigeria; 21%, up 6 points in Kenya), but strong majorities holding positive views continue to prevail (63% and 62%, respectively).

In Japan, a country where opinion is traditionally not quick to change, positive views of the EU's influence have dropped 13 points (to 23%), and negative ratings have risen by 15 points at the same time. The country now leans only slightly positive. The pattern is similar in Australia, where a strong decline in positive ratings (41%, down 17 points), combined with a very strong increase in negative ratings (41%, up 23 points), has caused the country to shift from leaning largely positive in 2011 to being divided in 2012.

Factors shaping perceptions of the EU (see note at top of page 7 for details)

Of those who said the influence of the EU in the world is positive, 38 per cent mentioned the foreign policy designed in Brussels as the primary reason to justify their rating. The economy, products and services from the Union was cited by 22 per cent.

Foreign policy of the Union was also the first reason cited by those holding negative views (35%), still followed by the economy products and services (26%).

Russia

Globally, views of Russia's influence remain negative in 2012, with a decline in positive perceptions cancelling the improvement observed last year. In the 21 tracking countries surveyed both in 2011 and 2012, 31 per cent have positive views of the Russian influence in the world, three points less than in 2011. The proportion giving negative ratings remains stable, at 36 per cent. Of the 22 countries surveyed in 2012, only seven lean positive, ten lean negative, and five are divided.

In the US, little variations in the ratings has resulted in a shift of opinion. Americans have gone from being divided in 2011 (38% vs 41%) to leaning negative in 2012 (34% vs 41%). In the other Anglo-Saxon countries surveyed, Canadians remain divided (39% vs 43%) but Australians has shifted from leaning negative in 2011 (37% vs 43%) to being divided in 2012 (34% vs 38%). The British continue to be largely negative overall (33% vs 49%) despite a 6-point decrease in negative ratings since 2011.

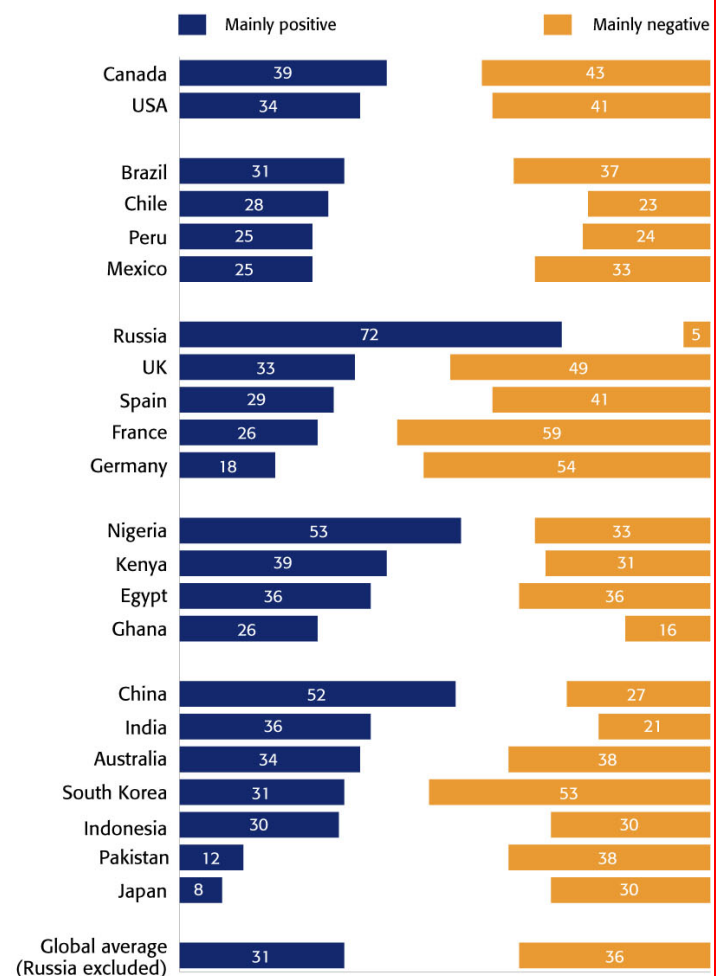
In the rest of the EU countries, perceptions of Russia remain fairly stable, with the publics continuing largely to see Russia unfavourably. The French are the most unfavourable in the survey, with almost six in ten (59%) giving negative ratings, followed by the Germans (54%). The Spaniards are a bit more moderate, with a plurality of 41 per cent leaning negative.

The French are the most unfavourable in the survey, with almost six in ten (59%) giving negative ratings, followed by the Germans (54%). The Spaniards are a bit more moderate, with a plurality of 41 per cent leaning negative. In South Korea, views are dramatically reversed. While a plurality of 47 per cent held positive feelings in 2011, a majority of 53 per cent leans negative this year following a 16-point drop in positive ratings (down to 31%) and a 12-point increase in negative ratings. In Japan, negative ratings have declined (30%, down 8 points) but the country continues to lean negative due to a stable and very low proportion of positive ratings (8%). In Indonesia, a 12-point drop in negative ratings has caused the country to shift from leaning negative in 2011 (33% positive vs 42% negative) to being divided in 2012 (30% vs 30%). In Pakistan, attitudes have worsened slightly, and a plurality of 38 per cent (up 6 points) leans negative.

The attitudes of the BRIC countries other than Russia have evolved in various ways. The opinion has reversed in Brazil, following a 9-point drop in positive ratings: leaning positive in 2011 (40% positive vs 33% negative), the country leans negative in 2012 (31% vs 37%). In the two geopolitical allies of Russia in Asia, China and India, the overall perceptions continue to be positive. Favourable attitudes have strongly improved in China, where a majority of 52 per cent (up 5 points, and second-highest rating for Russia in the survey) rates Russia positively, while negative ratings have decreased sharply (27%, down 13 points). In India, however, a plurality of only 36 per cent leans positive in 2012—a sharp drop of 22 points since 2011 (58%).

Views of Russia's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

The most favourable views towards Russia in 2012 are found in Nigeria, where a majority of 53 per cent rates it positively, a significant rise (15 points) since 2011. Positive views have also improved in Kenya (39%, up 6 points), and Kenyan opinion has shifted from being divided in 2011 to leaning positive in 2012 (39% vs 31%). In Ghana, a small plurality (26%, down 6 points) continues to hold favourable views, but the proportion of Ghanaians unable to give a clear rating increased by 16 per cent (58%). Respondents in Egypt have gone from leaning positive in 2011 (37% vs 19%) to being divided in 2012 (36% vs 35%), due to a 16-point increase in negative ratings.

In Latin America, views have also deteriorated in Mexico, where the opinion has shifted from being divided in 2011 (25% vs 25%) to leaning negative in 2012 (25% vs 33%). Largely favourable in 2011 (40% vs 22%), perceptions in Chile are only somewhat positive following a marked drop in positive ratings (28%, down 12 points). In Peru, respondents remain divided (25% vs 24%).

Factors shaping perceptions of Russia (see note at top of page 7 for details)

Of those who rated the influence of Russia negatively, a third (33%) mentioned the Kremlin's foreign policy as the top reason to justify their negative rating. The way the Russian government treats its people was also cited as an important reason (29%).

Those who rated Russia's influence favourably cited its foreign policy (37%), ahead of its traditions and culture (28%).

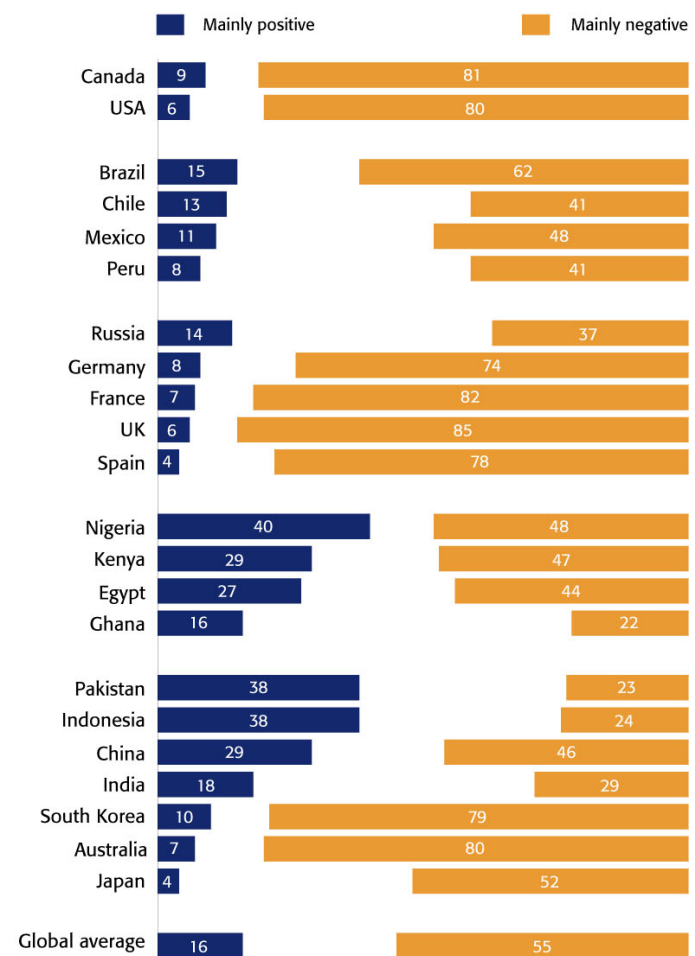
Iran

In 2012, Iran continues to be the most negatively viewed of all countries rated. On average, in the 22 tracking countries, 55 per cent have an unfavourable opinion of Iran's influence, while just 16 per cent have a favourable opinion. Negative ratings have decreased by two points since 2011, while positive views remained unchanged (16%): statistically speaking, perceptions of the country have improved very slightly. Of the 22 countries surveyed in 2012, 20 lean negative, and two (Pakistan and Indonesia) lean positive.

The most unfavourable ratings are found in the Western countries, where negative ratings remain overwhelming and largely stable. Eighty-five per cent of respondents in the UK rate Iran's influence negatively (up 6 points), while negative ratings sit at 82 per cent in France, 81 per cent in Canada, 80 per cent in Australia and in the US (the latter of which has come down 7 points from last year), 79 per cent in South Korea, and 78 per cent in Spain. In Germany, the decrease in negative ratings has been slightly more significant, but three quarters continue to hold unfavourable views (74%, down 11 points). Japan is the remaining country where a majority

Views of Iran's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA."

Asked of half of sample

leans negative (52%). In Mexico, the proportion of negative ratings has surged to 48 per cent (up 23 points), while positive ratings have simultaneously dropped nine points. Somewhat negative in 2011, Mexican opinion thus has hardened dramatically to lean strongly negative in 2012, similarly to all other OECD countries surveyed.

In China, while negative ratings remain high (46%), positive ratings have dropped nine points (29%). A similar 9-point drop has occurred in India, shifting the country from being divided in 2011 to leaning negative this year (18% vs 29%).

Respondents in a handful of countries have softened their views, especially in South America, the proportion of negative ratings has decreased in the three countries surveyed (62% in Brazil, down 13 points; 41% in Chile and Peru, down 8 and 6 points, respectively). Brazil also displays an increase in positive ratings (15%, up 8 points). The pattern is similar in Sub-Saharan Africa: significant decreases in negative views have occurred in Ghana (22%, down 24 points) and in Kenya (47%, down 10 points), the latter of which has increased its proportion of positive views by 12 points (29%). Forty per cent of Nigerians rate Iran positively—the largest proportion to do so for Iran this year—experiencing an 18-point increase since 2011, thereby coming close to the stable 48 per cent plurality that holds unfavourable views.

Those in neighbouring Pakistan continue to lean positive (38% vs 28%) despite a 10-point rise in negative ratings. While Indonesians' opinions of Iran have been divided since 2008—except in 2011, where it leaned somewhat negative (35% vs 40%)—Indonesia has finally shifted to lean firmly positive in 2012 (38% vs 24%). However, this is not true in another Muslim country, Egypt, where perceptions are much more unfavourable: positive views are stable (27%) while negative ratings went up 12 points (44%).

Factors shaping perceptions of Iran (see note at top of page 7 for details)

Globally, amongst those who rated Iran's influence in the world negatively, four in ten (40%) mentioned the foreign policy of Tehran as the top reason to justify their negative rating, while 31 per cent pointed at how the regime treats its own people.

Respondents holding positive views did not really single out one dominant reason compared to another. Almost three in ten (28%) mentioned Persian traditions and culture, and a quarter (25%) mentioned Iran's foreign policy.

Brazil

Global perceptions of Brazil have cooled slightly over the past year. On average, in the 21 countries surveyed both in 2011 and 2012, positive ratings have declined from 48 to 45 per cent, while negative ratings are stable (18%). Out of the 22 countries surveyed in 2012, 20 countries lean positive, one leans negative (Pakistan), and one is divided (Germany).

Perceptions of Brazil in its regional sphere of influence continue to be favourable, with positive ratings being among the highest in Chile and Peru. Over six in ten Peruvians (62%) and Chileans (61%) rate Brazil positively—but the proportion has decreased by nine points in Chile since 2011. Mexicans also lean favourably towards the Brazilian influence, but views have moderated significantly over the past year: positive ratings have dropped 22 points, down to 43 per cent.

Among the other BRIC countries, attitudes towards Brazil have remained positive and fairly stable in Russia and in India where respective pluralities of 38 and 27 per cent rate Brazil's influence in the world positively. In China, negative ratings have decreased by 12 points (29%), and while the proportion of positive views has not changed significantly, Chinese opinion has shifted from being divided in 2011 (45% vs 41%) to leaning positive in 2012 (41% vs 29%).

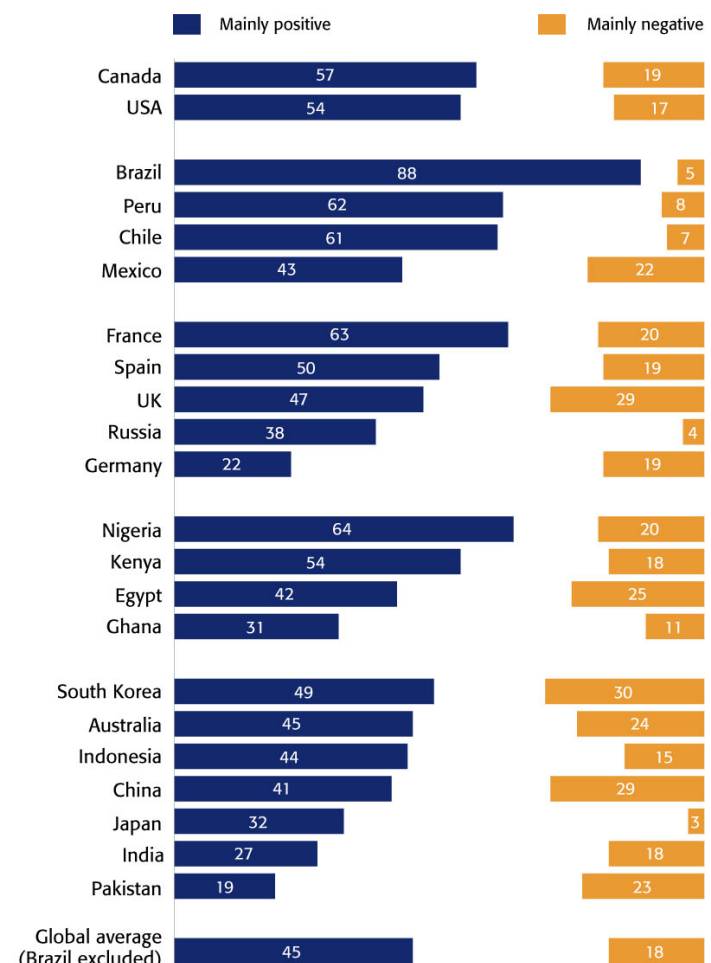
Among the EU countries, views are favourable and largely stable in France (63% positive ratings, the second-highest rating for Brazil in the survey), Spain (50%), and the UK (47%). The Germans continue to be more reserved, and the proportion of respondents without a clear opinion has increased from 37 to 58 per cent between 2011 and 2012. However, the country is divided overall (22% vs 19%), as in 2011.

In Africa, Brazilian influence is generally perceived positively, particularly in Nigeria (64% positive, the highest rating in the survey) and in Kenya (53%). Pluralities of Egyptians (42%) and Ghanaians (31%) also lean positive towards Brazil, but their favourability has weakened, due to an 11-point increase in negative ratings in Egypt (25%), and to an 8-point fall in positive views in Ghana. Negative ratings have gone up among Nigerians as well (20%, up 11 points).

Views in North America continue to lean very favourably, with 57 per cent of Canadians rating Brazil positively, and 54 per cent of Americans doing the same—although the proportion in the US has decreased by six points. In Australia, a relatively stable plurality of 45 per cent feels positive, somewhat less than in 2011 (50%).

Views of Brazil's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA." Asked of half of sample

In Asia, while there are still strong pluralities holding favourable perceptions in South Korea (49%), and Indonesia (44%), positive ratings have decreased nonetheless (down 19 points among South Koreans, and down 6 points among Indonesians). Negative ratings in Pakistan have increased by nine points (23%), shifting the opinion from leaning positive in 2011 (21% vs 14%) to being divided in 2012 (19% vs 23%).

Factors shaping perceptions of Brazil (see note at top of page 7 for details)

Globally, amongst those who rate Brazil's influence in the world positively, 35 per cent mention Brazilian traditions and culture as the first reason to justify their rating. The economy and products of "the engine of Latin America" follows as the second most important reason (26%).

Respondents holding negative views of Brazil do not really single out one particular reason compared to another. All prompted reasons are mentioned by close to a quarter each: the way people are treated (26%), the Brazilian economy (23%), the foreign policy (22%), and Brazilian traditions and culture (22%).

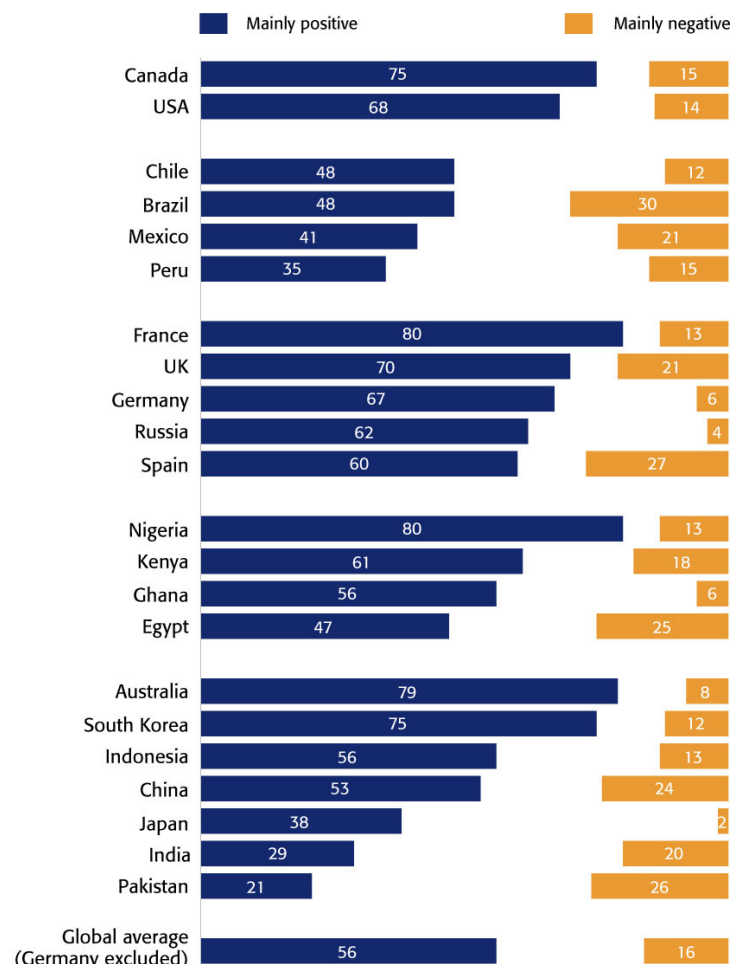
Germany

For the first time since tracking began in Germany in 2008, the country is not seen as having the most positive influence in the world among all countries evaluated. Globally and in the 21 tracking countries surveyed both in 2011 and 2012, 56 per cent of people rate Germany positively. This represents a 4-point decrease since last year: Germany now ranks second, behind Japan (58%). Negative views have also risen two per cent (16%) but the proportion remains at very low levels—the second lowest after Canada. Of the 22 countries polled in 2012, 21 lean positive and one leans negative (Pakistan).

In a number of Western countries, positive perceptions of Germany have been moderated. Favourable ratings have sharply declined in Spain (60%, down 14 points), a decrease matched by a rise in negative ratings (27%, up 15 points). In the UK, while seven in ten respondents (70%) rate Germany's influence positively, the proportion has gone down by seven points since 2011, while negative perceptions have increased at the same time (21%, up 11 points). French respondents bucked this relatively negative trend in perceptions of Germany, as their attitudes have remained steady and highly favourable (80% positive, a very high rating matched only by the Nigerians).

Views of Germany's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA."
Asked of half of sample

In North America, the improvement in positive perceptions of Germany that was seen in the US in 2011 has been erased: the proportion of Americans holding favourable attitudes has dropped eight points (68%) and is back to the level of 2010. In Canada, however, positive views have strengthened and three quarters of Canadians (75%) lean favourably towards Germany, which represents a 6-point increase since 2011.

In the Asian OECD countries, attitudes continued to be stable and very favourable in Australia (79% positive, 8% negative) and Japan (38% vs 2%). But South Koreans' opinions have worsened—three in four (75%) rate Germany positively, seven points below the level of 2011 (82%).

Attitudes towards Germany in the BRIC countries have continued to be favourable, albeit with some variations. Like in 2011, the Russians are the most favourable of the BRIC countries with a majority of 62 per cent giving positive ratings—but the percentage has decreased six points since 2011. China follows with a steady majority of 53 per cent leaning favourably, while negative ratings have fallen 15 points (down to 24%). A plurality of Indians (29%) continues to have positive feelings about German influence in the world, but this is eight points less than in 2011. Overall perceptions in Brazil have deteriorated, with a 16-point decrease in positive ratings (48%) being matched by an increase in negative ratings (30%, up 16 points).

In the rest of Latin America, views have not changed as much as they have in Brazil, and continued to be favourable overall. Forty-eight per cent of Chileans rate Germany positively—down six points since 2011, but counterbalanced by a 7-point drop in negative ratings—as do 41 per cent of Mexicans (where negative ratings have also declined by six points, down to 21%) and 35 per cent of Peruvians.

All Sub-Saharan countries surveyed lean strongly positive towards Germany. With 80 per cent positive ratings, perceptions in Nigeria have gotten warmer since 2011 (up 7 points). Solid majorities of 61 and 56 per cent are also found in Kenya and in Ghana, respectively. However, Ghanaian views have cooled since 2011, experiencing a 14-point drop in positive ratings.

Approval in Muslim countries has deteriorated slightly over the past year. A plurality of Egyptians leans favourably towards Germany (47%), but negative ratings have gone up 13 points (25%). In Indonesia, a comfortable majority has favourable attitudes (56%) but this is nine points lower than in 2011. Negative ratings among Pakistanis have increased by seven points (26%), shifting the opinion from being divided in 2011 (22% vs 19%) to leaning somewhat negative in 2012 (21% vs 26%). Pakistan is the only country with an overall negative perception of Germany.

Factors shaping perceptions of Germany (see note at top of page 7 for details)

Globally, amongst those who rate Germany's influence in the world positively, the German economy is cited as the most important reason to justify their rating, mentioned by 36 per cent of respondents, before the German foreign policy (31%).

For those holding negative views, the foreign policy of Berlin emerges as the first explanation (36%) for their rating. The way Germany treats its people, and German traditions and culture are the second placed reasons, equally mentioned by 20 per cent of respondents.

South Korea

World opinion about South Korea has continued to improve, as it has done over the three years it has been measured. On average, in the 21 tracking countries, the proportion of people having favourable views of South Korea's influence has gone up two points, to 37 per cent, while the proportion rating it negatively has decreased by four points, down to 27 per cent. Of the 22 countries surveyed in 2012, 15 countries hold positive views, four hold negative views, and three are divided.

Views in North America are favourable and continue to improve. A stable majority of Americans sees South Korea's influence positively (53%), and the proportion of negative ratings has declined (26%, down 6 points). In Canada, views are very similar, with 52 per cent of Canadians leaning positive (up 6 points from 46%) and a stable proportion of negative ratings (32%).

Perceptions of South Korea's influence among its closest regional neighbours have become more positive in 2012.

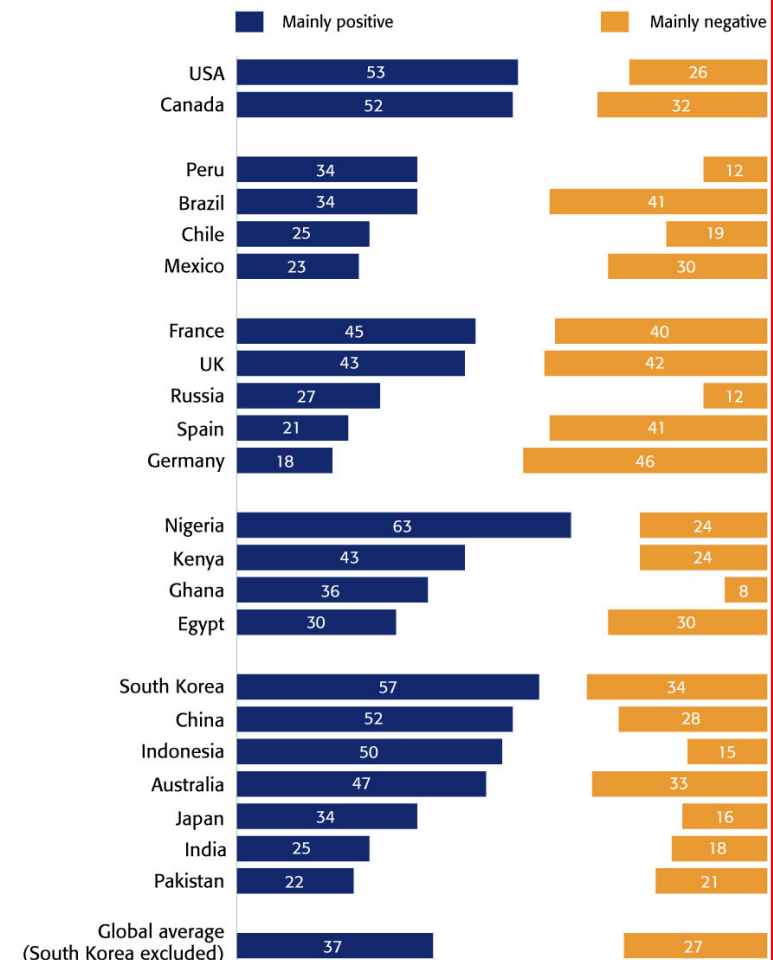
The most interesting change is seen in China, where opinion has shifted from leaning negative in 2011 (36% positive vs 50% negative) to leaning positive in 2012 (52% vs 28%). In Russia, the proportion of respondents holding unfavourable views has dropped (12%, down 11 points) and this drop has inflated the proportion of those without a clear idea on the question (61%, the highest proportion in the survey on South Korea). As a result, the country has shifted from being divided in 2011 (26% vs 23%) to leaning positive in 2012 (27% vs 12%). In Japan, 34 per cent hold positive views, a proportion more than double the figure for negative ratings (16%).

Views have improved somewhat in India, where the opinion has moved from being divided in 2011 to leaning positive in 2012 (25% positive vs 18% negative), thanks to a 6-point increase in positive ratings. A majority of Indonesians (50%) continues to rate South Korea positively, while negative ratings have declined by eight points (down to 15%); Pakistanis are divided (22% vs 21%), like in 2011.

Opinion varies in the EU countries. A 7-point drop in negative ratings (down to 40%) has made French opinion shift from leaning negative in 2011 (41% vs 47%) to leaning somewhat positive in 2012 (45% vs 40%). The British continue to be divided (43% positive, 42% negative), while unfavourable attitudes have remained dominant among the Germans (18% vs 46%) and the Spanish (21% vs 41%).

Views of South Korea's Influence

By Country, 2012



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The white space in this chart represents "Depends," "Neither/neutral," and "DK/NA."
Asked of half of sample

In Latin America, Peruvians and Chileans continue to hold positive views of South Korea, although Chilean opinion has become more balanced following drops of both positive (25%, down 12 points) and negative ratings (19%, down 7 points). Despite a decrease in the negative ratings in Mexico (30%, down 7 points), Mexican opinion remains unfavourable overall (23% vs 30%). Brazilian opinion has shifted this year from being divided to leaning negative (34% vs 41%).

In Africa, Nigerians offer the most favourable views of South Korea in the survey, with a majority of 63 per cent rating it positively (up 21 points since 2011). Opinion in Kenya has shifted from being divided to leaning positive in 2012, thanks to a 6-point increase in positive ratings (to 43%) combined with a 10-point drop in negative ratings (down to 24%). In Egypt, the improvement started in 2010 continues: following a 7-point rise in positive ratings, overall attitudes are now equally divided (30% vs 30%)—a change from 2011, when they were somewhat negative.

South Koreans themselves, while still holding strong favourable views of their own country's influence in the world (57%) have become much more nuanced about it over the past year as the proportion of positive self-ratings has plummeted from 84 per cent.

Factors shaping perceptions of South Korea (see note at top of page 7 for details)

Globally, amongst those who rate South Korea's influence in the world positively, the economy and products of the peninsula are cited by 37 per cent of respondents as the first reason to justify their rating. The foreign policy of Seoul is the second most important reason and is cited by 23 per cent—but closely followed by the South Korean traditions and culture (22%).

For those holding negative views, the foreign policy is the most commonly given explanation (35%) for their rating. The way the country treats its people comes second and is mentioned by 28 per cent.

Methodology

In total 24,090 citizens in Australia, Brazil, Canada, Chile, China, Egypt, France, Germany, Ghana, India, Indonesia, Japan, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, South Korea, Spain, the United Kingdom, and the United States were interviewed face-to-face or by telephone between December 6, 2011 and February 17, 2012. Countries were rated by half samples in all countries polled. Polling was conducted for BBC World Service by GlobeScan and its research partners in each country.

In Brazil, China, Egypt, Indonesia, and Kenya urban samples were used. The margin of error per country ranges from +/- 2.9 to 4.9 per cent, 19 times out of 20.

Country	Sample Size (unweighted)	Field dates	Sample frame	Survey methodology	Type of sample
Australia	1000	December 7, 2011 – February 1, 2012	18+	Telephone	National
Brazil	804	December 20, 2011 – January 20, 2012	18–69	Face-to-face	Urban ¹
Canada	1002	December 21, 2011 – January 18, 2012	18+	Telephone	National
Chile	1200	December 12–22, 2011	18+	Face-to-face	National
China	1000	December 22, 2011 – January 12, 2012	18+	Telephone	Urban ²
Egypt	1021	December 8–22, 2011	18+	Face-to-face	Urban ³
France	814	January 2–12, 2012	15+	Telephone	National
Germany	1006	December 27, 2011 – January 24, 2012	16–70	Telephone	National
Ghana	1035	January 9–24, 2012	18+	Face-to-face	National
India	1209	January 4–12, 2012	18+	Face-to-face	National
Indonesia	1000	December 17, 2011 – January 18, 2012	18+	Face-to-face	Urban ⁴
Japan	1638	January 21–22, 2012	20+	Face-to-face	National
Kenya	1000	January 12–18, 2012	18+	Face-to-face	Urban ⁵
Mexico	1000	January 15–20, 2012	18+	Face-to-face	National
Nigeria	1000	December 19–27, 2011	18+	Face-to-face	National
Pakistan	2344	December 25–31, 2011	18+	Face-to-face	National
Peru	1208	January 1–9, 2012	18–70	Face-to-face	National
Russia	1002	December 13–28, 2011	18+	Face-to-face	National
South Korea	1000	January 29–31, 2012	19+	Telephone	National
Spain	802	February 7–17, 2012	18+	Telephone	National
United Kingdom	1001	December 6, 2011 – January 18, 2012	18+	Telephone	National

USA	1004	December 14, 2011 – January 18, 2012	18+	Telephone	National
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¹ In Brazil the survey was conducted in Belo Horizonte, Brasília, Curitiba, Goiânia, Porto Alegre, Recife, Rio de Janeiro, Salvador, São Paulo, representing 45 per cent of the national adult population.

² In China the survey was conducted in Beijing, Beiliu, Chengdu, Dujiangyan, Fenyang, Fuyang, Guangzhou, Hangzhou, Manzhouli, Quanzhou, Qujing, Shanghai, Shenyang, Shuangcheng, Wuhan, Xi'an, Xining, and Zhengzhou, representing 45 per cent of the national adult population.

³ In Egypt the survey was conducted in Alexandria, Cairo, Giza, and Shubra El-Kheima, representing 24 per cent of the national population.

⁴ In Indonesia the survey was conducted in Bandung, Jakarta, Makassar, Medan, and Surabaya, representing 27 per cent of the national adult population.

⁵ In Kenya the survey was conducted in Kakamega, Kisumu, Machakos, Mombasa, Nairobi, Nakuru, and Nyeri, representing 45 per cent of the national adult population.

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