BRITISH COUNCIL

AS OTHERS SEE US

Culture, attraction and soft power

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Ipsos MORI

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CONTENTS

Foreword 2
Executive summary 3
Introduction: the power of attraction 4
What makes countries attractive? 6
- General factors 6
- Drivers of UK attractiveness 9
- Sources of attraction 15
- National comparison 25

Conclusions and recommendations 26
Appendix 28
- About the research 28
- Additional charts: country and gender breakdown 29
- Key to icons and clusters 30

ABOUT THE BRITISH COUNCIL

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We work in more than 100 countries and our 7,000 staff – including 2,000 teachers – work with thousands of professionals and policy makers and millions of young people every year teaching English, sharing the arts and in education and society programmes.

We are a UK charity governed by Royal Charter. A publically-funded grant-in-aid provides less than a quarter of our turnover which in 2012–13 was £781 million. The rest we earn from English teaching, UK exams and services which customers around the world pay for, through education and development contracts and from partnerships with other institutions, brands and companies. All our work is in pursuit of our charitable purpose and creates prosperity and security for the UK and the countries we work in all around the world.

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FOREWORD

The UK is in many respects one of the most attractive countries, and consistently ranks amongst the best, for its soft power and global influence. We will see this vividly illustrated this summer by the Commonwealth Games in Glasgow and the accompanying Cultural Festival.

The UK enjoys the global language of business, diplomacy and the internet; a thriving arts and creative sector; a rich history that provides connections with the rest of the world; dynamic cities; a proud record of science, research and innovation; and outstandingly beautiful countryside and landscape. The UK attracts vast numbers of international visitors, students, researchers, artists and business people to study, collaborate or trade with their UK counterparts. The country has what it takes to draw people to it – something that is vital in today's world, where success is increasingly linked to global relationships and connectivity.

Whilst we all have a sense of what it is about other countries that interests us as individuals, few studies have explored precisely what makes countries in general and the UK in particular attractive globally – in essence what underpins and could enhance the UK's soft power. The question this report sets out to explore is what most entices, connects and engages young people – especially those with the potential to be the political, business, academic and creative leaders of the future – with the UK and other countries.

My own experience in the arts, in enterprise and in education, naturally leads me to want to promote the key role the arts play in strengthening connections with the UK and in building lasting and powerful relationships across international borders. I am currently chairing the Warwick Commission on the Future of Cultural Value. One of the themes we are interrogating is the ecosystem that strengthens the connectivity between the UK's cultural dynamism, international profile and attractiveness and how this can promote enhanced global influence.

Arts and culture have a transformative impact on perceptions of nations and, as this research shows, is consistently the strongest factor in shaping international perceptions of our country. This is good news, given the world-renowned strength of our cultural industries. We need to ensure that we continue to invest in our artists and creative professionals and the training of our young people to renew and further strengthen this vital sector in the future.

As a nation, our influence today and in the future can be well served by aspiring to be one of the most attractive countries globally – sharing the best of our culture and values with people around the world and learning from the values and cultures of others. I am delighted to introduce this new research that gives us an indication of how we are viewed in the world and provides many lessons to support our aspirations for increased global influence.

Vikki Heywood CBE
Chairman, RSA

Vikki Heywood was previously Executive Director of the Royal Shakespeare Company and joint Chief Executive of the Royal Court Theatre.

She is chairman of Mountview Drama Academy, the RSA, the Warwick Commission on the future of cultural value and 14–18 Now – First World War Centenary Art Commissions.

She has been a board member of the Society of London Theatre, the London 2012 Cultural Olympiad, Warwick University and the Coventry and Warwickshire Local Enterprise Partnership.

EXECUTIVE SUMMARY

This research adds to the growing body of evidence which shows that the UK's arts and culture, its cities, and its education system are areas that make a contribution to its attractiveness. They present opportunities for wider and deeper engagement internationally, especially with younger people.

The report also explores and highlights the characteristics that make countries attractive more broadly and identifies the following factors as particularly important:

1. Cultural and historic attractions
2. Countryside and landscape
3. People
4. Arts
4. Cities

(Arts and Cities: =)

In comparison the following characteristics rank highest in making the UK attractive:

1. Cultural and historic attractions
2. Cities
3. Arts
3. Countryside and landscape
5. History

(Arts and Countryside and landscape: =)

Factors including sports, language and education, while less important overall are also strengths of the UK compared to their importance in making countries in general attractive.

This research also sets out an overall ranking of the attractiveness of the top 15 global economies. The UK ranks highly in this list coming second only to the US. The top five countries were:

1	US
2=	UK
2=	Australia
4	France
5	Italy

These results chime with the British Council's experience around the world. UK culture, arts, education, the English language and sports are in great demand and people with whom we work are attracted to our cities, especially London. This is reflected in the UK government's successful GREAT campaign which also showcases these attributes of the UK.

The emerging convergence on the UK's particular strengths should be further developed to ensure the country's continuing soft power, influence and future prosperity and security.

To make the most of its assets and enhance its appeal internationally, the UK must continue to nurture, invest and support successes in areas where it has distinctive advantage as well as in those areas known to contribute most to a country's attractiveness. We recommend that to further enhance its international profile, the UK must:

1. **Know its strengths**. Recognise that factors such as cultural and historic attractions, cities, countryside and landscape, arts, and history are particularly appealing to young people around the world. They must be placed at the centre of thinking about UK efforts to engage internationally.
2. **Invest in and support its areas of strength**. Continue to invest in and create the conditions for the success of those areas of strength which are contributors to the UK's international attractiveness, including its excellent cultural institutions and historic attractions, its arts sector and its education system.
3. **Recognise the international attractiveness of the UK arts and cultural sector in particular**. Continue to nurture the UK's arts and creative sectors to secure the skills, attract international talent and collaboration, and maintain the capacity for excellence in the future.
4. **Recognise its weaknesses**. Consider the mixed perceptions of the UK's people, science, technology/infrastructure and other factors, and consider what steps can be taken to address them.
5. **Let people and institutions do the talking**. Recognise that government is in itself not the biggest driver of countries' international attractiveness. The UK's soft power will be enhanced via the actions of cultural institutions and actors – including the ordinary and extraordinary people of the UK – who embody UK culture.
6. **Equip young people from the UK with an international outlook**. Encourage young people to see themselves as ambassadors for the UK and ensure that they understand the importance of perceptions around the world of the UK's people. Develop their skills and ability to engage effectively internationally in the future.

INTRODUCTION: THE POWER OF ATTRACTION

In a multipolar, hyperconnected world, a country's power is increasingly measured by its ability to inspire and attract citizens of other nations to take an interest in its national story, enjoy its passions, and ultimately respect its values, ideas and aspirations.

The 'great game' of soft power, 'the ability to **attract** and co-opt rather than coerce',[1] is increasingly being played out across social media, on film and screen, over the internet, in concert halls, in galleries and in schools and universities. As a result, the power of attraction has become a vital asset and driver of countries' international standing and influence.

But what makes a country attractive to others? How attractive is today's UK? And how can the UK make itself more attractive globally, to become a partner of choice whether for international trade and investment, tourism, study, research or artistic collaboration?

These are the questions that this publication, and the research it contains, seeks to explore.

Much has been said and written about the economic and geopolitical power shift taking place in the world today with influence growing in regions other than the traditional developed economies – including in the so-called BRICs and MINTs.[2] In what can increasingly be seen as a multipolar world, influence is becoming more dynamic and diffuse. Similarly, as the march of globalisation continues, the big challenges that affect us all – whether sustainability; energy, food and water security; tackling global poverty or the spread of disease – can no longer be tackled effectively by any single country or agency. Countries and people working together matters more than ever.[3]

But there is another important shift in influence taking place: power is drifting away from governments and being picked up by people, brands and movements; established hierarchies are being challenged by new local, national and global networks. The international landscape is being transformed by hyperconnectivity, social media, and the rapid rise of direct people-to-people connections unmediated by states.[4]

Myriad conversations and relationships are now conducted across national borders every second between individuals, businesses, charities, universities and other bodies. Across the world, people are able to shape international events in a way that is unprecedented in human history. And this is not just happening in Europe and the US. While internet penetration and social media use is still higher in the West, China has the largest number of internet users of any country with over 500 million people connected, Indonesia has more internet users than the UK, and Nigeria more internet users than Italy.[5] The research which informed this report showed that for educated young people the internet is now the most important source of information about the UK.

This changing nature of international affairs is profoundly affecting the role and influence of governments. More and more, soft power and international influence stems from factors outside the direct control of politicians and is becoming rooted in the wider assets and values of a society and its people. In his seminal 2004 book *Soft Power: The Means to Success in World Politics*, Professor Joseph Nye identified three broadly defined sources of this growing source of influence: a country's culture, foreign policies and political values.[6] The Institute of Government, in its publication *The New Persuaders*, identified five components of soft power: culture, government, diplomacy, education and business/innovation.[7] Its ranking of nations' soft power is based upon a quantitative evaluation of their assets in each of these areas, rather than the impact of those assets in terms of how they are perceived by individuals internationally. The Anholt-GfK Roper Nations Brands Index™ assesses a country's international reputation across six distinct areas: exports, governance, culture, people, tourism, and immigration and investment. Its scores are based upon a global survey of over 20,000 people in 20 countries.[8]

These studies all make an important contribution to understanding how countries are perceived by others and how they can enhance their soft power.

‘For the majority of nations, the need to study, to understand, and to think about ways of influencing their international reputation is no longer really a matter of choice: either one takes some control over one’s national reputation or one allows it to be controlled by public opinion and public ignorance.’

Simon Anholt[9]

They have also informed several recent reviews and publications into the topic of the UK’s soft power, why it matters and how it can be developed and used to best effect in the future. These include the work of the House of Lords Committee on Soft Power and the UK’s Influence which concluded earlier this year with the publication of a comprehensive report;[10] the British Academy’s report – *The Art of Attraction*;[11] and the British Council’s own report *Influence and Attraction*[12] which charted the emerging trends in international cultural relations.

These initiatives all concluded that if the UK wants to succeed in the future it will need to have assets which people elsewhere find attractive, and the means with which to communicate and share those assets internationally.

This publication builds on these reports and studies and asks: which national assets are perceived to be valuable by those people who the UK and others are trying to attract? To paraphrase the House of Lords Committee: *What are the attributes, values and outputs that gain for the UK both attractiveness and respect in the eyes of people abroad*? Put even more simply, **what makes a country attractive?**

The research that forms the basis of this report also explores the extent to which a country’s people, culture and education systems (the key UK assets that the British Council shares around the world) play a role in terms of making countries attractive and thereby contributing to their soft power.

The research focused on young educated people in countries with whom the UK and other nations around the world are seeking to connect for education, tourism and/or business purposes. These people are the professionals of future decades, and some of them will be the future leaders in their countries, regions and sectors. Over 1,000 of these young educated people were surveyed via an online questionnaire in Brazil, China, Germany, India, and the US. Another 1,000 young educated people were surveyed online in Great Britain. Throughout this publication, where possible and appropriate, we have shown data from across six countries including Great Britain. Where data relates specifically to perceptions of the UK, no Great Britain data is included. Full details of the survey methodology and samples are provided in the Appendix.

1. Nye, JS (2004) *Soft Power: The Means to Success in World Politics*, New York: Public Affairs.
2. BRICs: Brazil, Russia, India, China; MINTs: Mexico, Indonesia, Nigeria, Turkey.
3. For a full discussion of such challenges and the importance of further international cooperation, see: Ian Goldin (2013) *Divided Nations: Why global governance is failing and what we can do about it*, Oxford University Press, Oxford.
4. For a full discussion see David Howell (2013) *Old Links and New Ties: Power and Persuasion in an Age of Networks*, London: I.B. Tauris.
5. www.internetworldstats.com/top20.htm
6. Nye, JS (2004) *op. cit.*
7. Institute of Government (2013) *The New Persuaders III*. Available online: www.instituteforgovernment.org.uk/sites/default/files/publications/The%20new%20persuaders%20III_0.pdf
8. www.gfk.com/news-and-events/press-room/press-releases/pages/nation-brand-index-2013-latest-findings.aspx
9. Anholt, S (2010) *Places: Identity, Image, Reputation*, Basingstoke and New York: Palgrave Macmillan.
10. House of Lords Select Committee on Soft Power and the UK’s Influence (2014) *First Report. Persuasion and Power in the Modern World*. Available online: www.publications.parliament.uk/pa/ld201314/ldselect/ldsoftpower/150/15002.htm
11. The British Academy (2014) *The Art of Attraction*. Available online: www.britac.ac.uk/intl/softpower.cfm
12. The British Council (2013) *Influence and Attraction*. Available online: www.britishcouncil.org/sites/britishcouncil.uk2/files/influence-and-attraction-report.pdf

The Louvre Museum in Paris

WHAT MAKES COUNTRIES ATTRACTIVE?

GENERAL FACTORS

The starting point for this research was a desire to explore the range and importance of factors people might take into account when assessing the attractiveness of a country. As Chart 1 illustrates, the findings show that a wide range of factors can be important. They include a country's cultural and historic attractions, its countryside and landscape, and its people – each chosen by six out of ten respondents. Other prominent factors are its cities, its arts and a reputation for being safe and secure – all chosen by at least five out of ten.

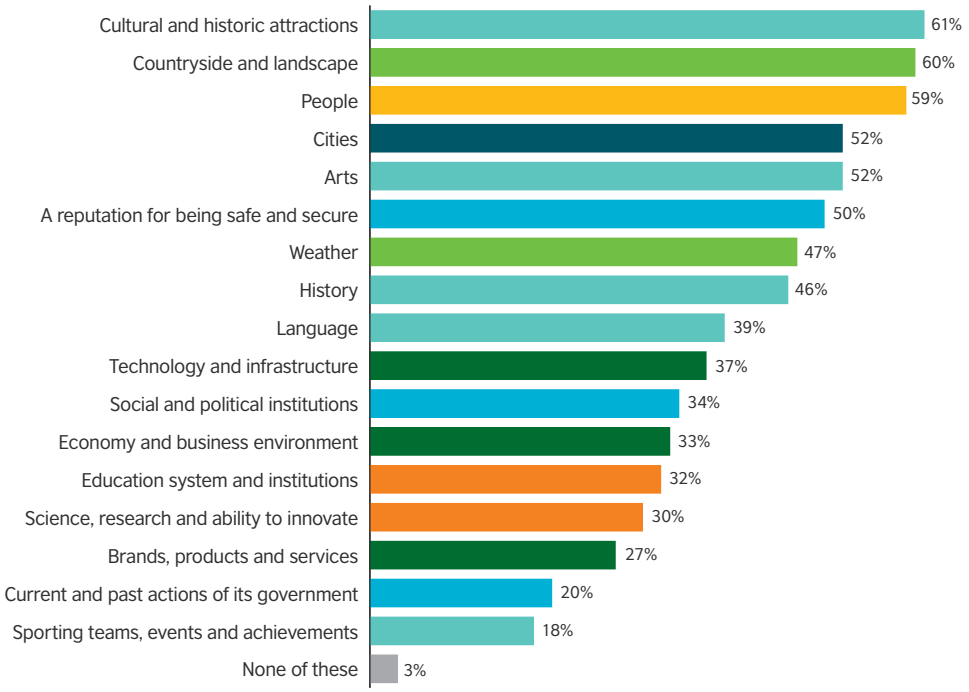
Still important for many people, but slightly further down the list, are factors such as a country's weather; its history; its technology and infrastructure; its language; its economy and business environment; its social and political institutions in areas such as the media, law, and health; and its education system. The actions of a country's government and its sporting teams and events are less widely considered to contribute to attractiveness but are still chosen by around one in five people.

To explore these results further, responses were analysed for each survey country separately. People in different parts of the world have slightly different views as to which of the characteristics are most important in making a country attractive, although cultural factors score highly in all six countries surveyed. Respondents from India rank technology and infrastructure as well as weather among the top three factors while these do not feature in the top three for any other country group. Similarly, respondents from Germany rank a country's cities more highly than other country groups.

In addition to the breakdown by country of origin, respondents could also be grouped by stated areas of interest in other countries, such as: studying abroad; tourism; doing business internationally;

Chart 1: National attractiveness is influenced by many factors

Question: Which, if any, of the following characteristics particularly contribute to making a country attractive to you?



Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

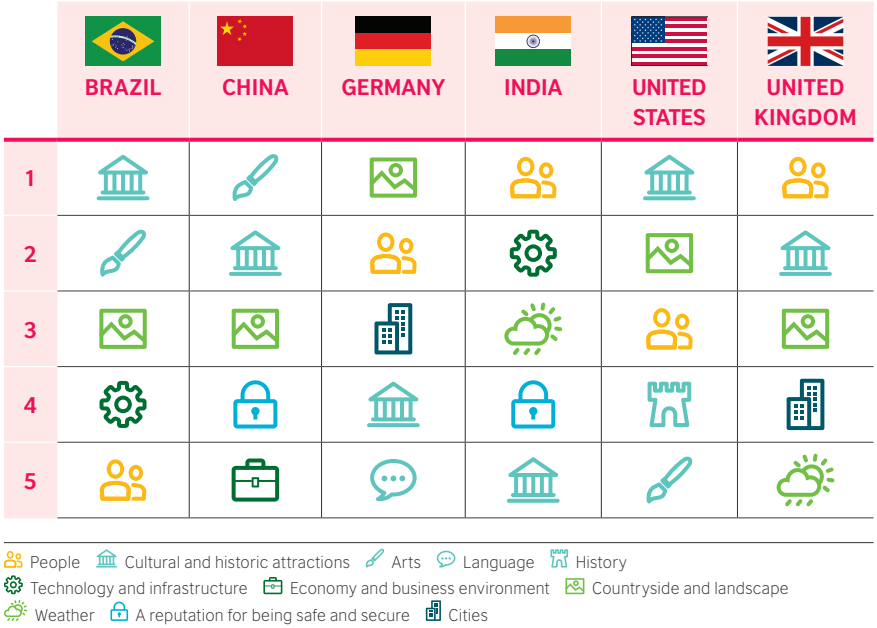
living or working abroad; making personal contacts abroad; and interest in other countries' arts and culture respectively. A breakdown of the interests of survey respondents is presented in Chart 3. 77 per cent of survey respondents indicated they were interested in tourism whereas 33 per cent indicated an interest in studying in another country and 28 per cent indicated an interest in doing business internationally.

There was a high degree of consistency in terms of what was most commonly identified as making a country attractive regardless of these areas of interest. Chart 4 shows that the three factors most frequently chosen across all groups were cultural and historic attractions, countryside and landscape, and people.[13]

When analysed by gender, an interesting pattern emerged. Both men and women identified cultural attractions, countryside and landscape, and people as the top three characteristics. Looking further down the rankings of characteristics, a country's arts, language and education system are among the factors ranked relatively more highly by women, while technology and infrastructure, science, economy and business environment, and sporting teams are ranked more highly by men.[14] However, these results may also reflect differences in the areas of interest between men and women.

Chart 2: Factors influencing national attractiveness, by country

Question: Which, if any, of the following characteristics particularly contribute to making a country attractive to you?

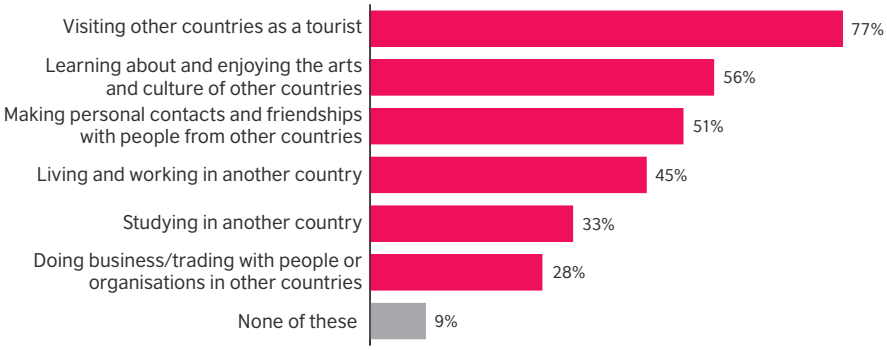


Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: For a complete list of factors broken down by country see page 29.

Chart 3: People are interested in other countries for a number of reasons

Question: Which, if any, of the following are you particularly interested in?



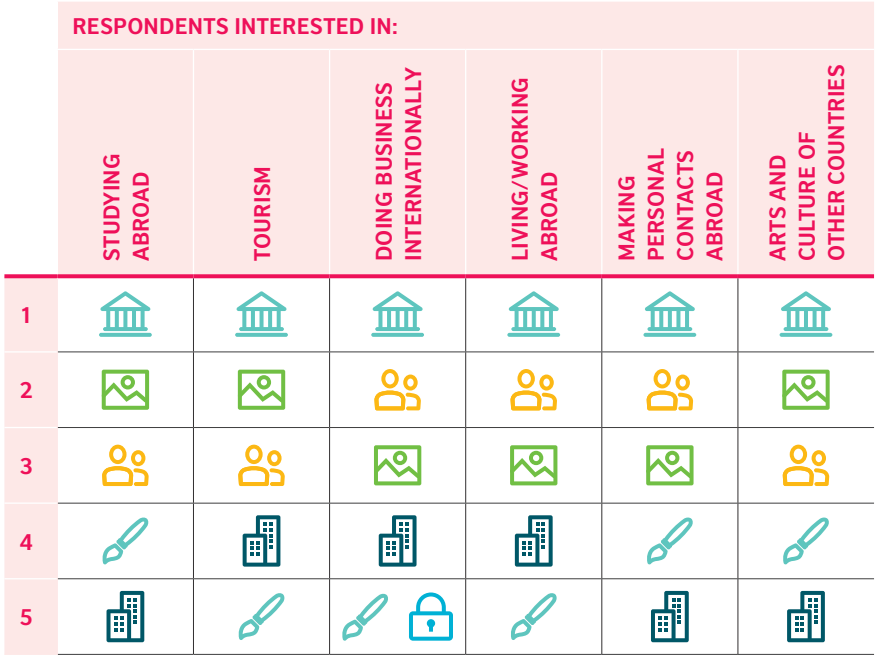
Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

13. Of course many people will be interested in other countries for a number of reasons and multiple interests may influence respondents' selection of individual factors as important in determining countries' attractiveness. However, the sample sizes of subgroups defined by exclusive interests were too small to permit detailed analysis that could have explored this issue further.
14. For a full breakdown of characteristics by gender see Chart B in the Appendix.

The Great Wall of China

Chart 4: Factors of attractiveness as rated by different interest groups

Question: Which, if any, of the following characteristics particularly contribute to making a country attractive to you?



People · Cultural and historic attractions · Arts · Countryside and landscape · A reputation for being safe and secure · Cities

Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

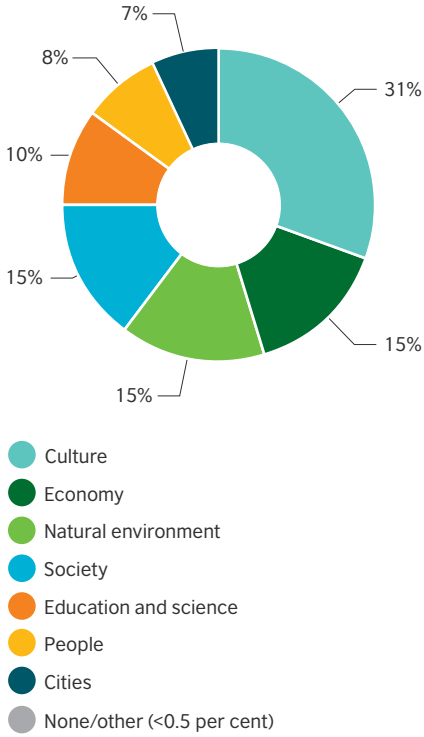
Note: The interest groups presented here are not discrete groups as multiple selections were possible.

To simplify the picture of the factors most important in making a country attractive, the survey results have been summarised in Chart 5 to show which broad areas are most commonly chosen as making a contribution to a country's attractiveness. This highlights the very strong role of cultural factors (31 per cent of responses), followed by the economy, society, the natural environment (at 15 per cent of responses each) and education and science (ten per cent). Cities and people, which receive eight per cent and seven per cent of responses respectively, stand out in their own right as important factors in making a country attractive to young people across the five countries surveyed.

These findings suggest that culture, the natural environment, people, cities, and education and science all play a more prominent role than has perhaps been previously acknowledged in thinking around soft power. These factors should be carefully considered by those who seek to conceptualise and to develop their country's international attractiveness and influence.

Chart 5: Relative importance of different clusters in driving attractiveness of countries in general

Question: Which, if any, of the following characteristics particularly contribute to making a country attractive to you?



Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Percentages represent share of all responses. Any deviation from a total of 100 per cent is due to rounding of individual figures. See fold-out on page 30 for cluster definitions. Five-country data represented here to ensure comparability with Chart 9.

The Reichstag building, Berlin

DRIVERS OF UK ATTRACTIVENESS

As well as reviewing data about the attractiveness of countries in general terms, the research also explored which factors most contribute to the attractiveness of the UK.

Respondents in Brazil, China, India, Germany and the US were asked to name the one thing about the UK that they found most attractive. The results are shown in Chart 6. The most frequent responses clearly indicated that the UK's culture, history, language and people were among the things that were 'top of mind' for respondents.

Survey respondents were also asked to indicate which factors from the predetermined list used to assess attractiveness of countries in general (as presented in Chart 1) they thought were important in making the UK attractive.

Chart 6: What makes the UK attractive?

Question: What one thing, if anything, most makes the UK attractive to you?

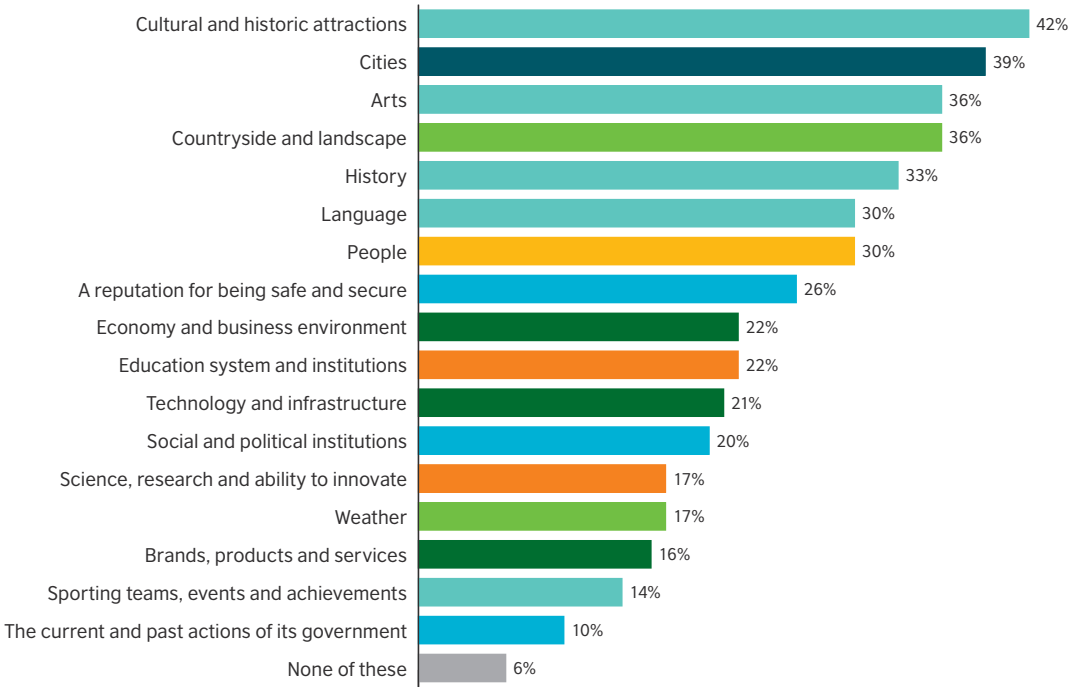
Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Open ended question asked of one in five survey respondents in each country. Visual represents the top 30 features mentioned for accessibility.

Edinburgh Castle

Chart 7: The factors making the UK attractive

Question: Which, if any, of the following characteristics particularly contribute to making the UK attractive to you?



Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

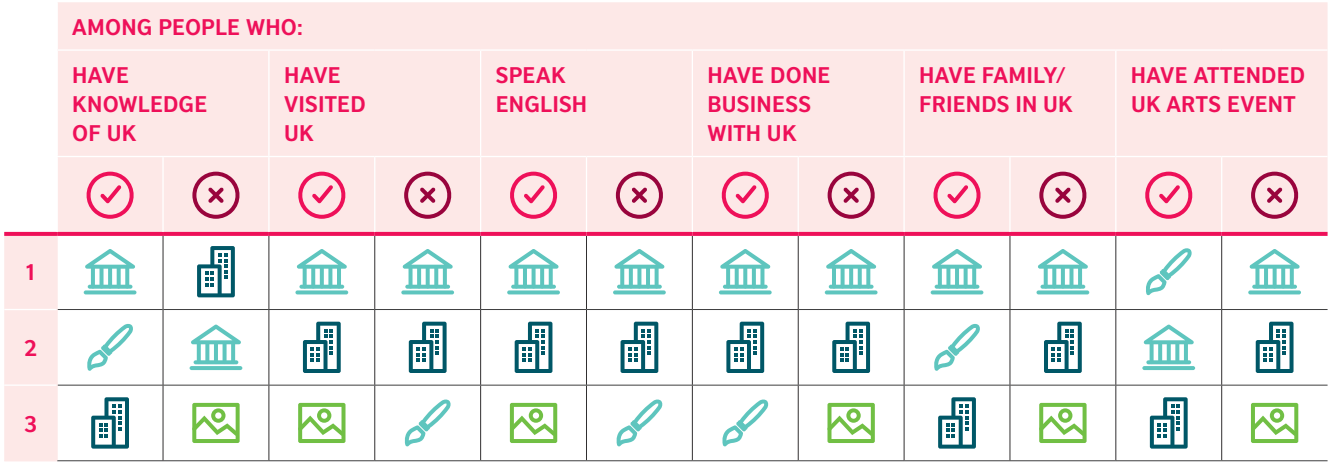
Chart 7 shows that, just like in the case of countries in general, cultural and historic attractions are the most frequently cited factors driving the attractiveness of the UK. These are identified as contributing to the UK's attractiveness by 42 per cent of respondents. Cities are second, mentioned by 39 per cent and countryside and landscape third, mentioned by 36 per cent of people.

Arts, history, people and language are also all significant factors in their own right, mentioned by 30 per cent of respondents or more.

Previous research by the British Council suggests that greater knowledge and familiarity with the UK might affect people's attitudes.[15] Therefore another question that is important to explore is the extent to which people overseas who already have knowledge of and/or connections with the UK might have a different view of which factors are important in determining the UK's attractiveness. Chart 8 provides a direct comparison between the respondents who have such knowledge, connections or familiarity with the UK and those who do not.

Chart 8: Do knowledge and engagement influence which factors determine the UK's attractiveness?

Question: Which, if any, of the following characteristics particularly contribute to making the UK attractive to you?



Cultural and historic attractions · Arts · Countryside and landscape · Weather · Cities

Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Responses analysed against respondents stated knowledge, experience or connection with the UK. Findings are presented as percentage of respondents selecting each factor.

Across the countries there is remarkable commonality in the ranking of the factors people regard as contributing to the attractiveness of the UK. Those with experience of, and previous engagement with, the UK tend to identify more factors contributing to its attractiveness compared to those with little or no experience. However, the overall ranking tends to be similar, regardless of whether they have personal experience of the UK or have experienced the UK through friends, business, visits or the arts.

Exploring the data in further detail and looking at the responses within a particular country, greater variation is apparent. For example, among respondents from Germany, 54 per cent had visited the UK and 46 per cent had not. Both groups most commonly identified cities as a factor making the UK attractive. There were, however, some important differences. Compared to their peers who hadn't visited, previous visitors to the UK not only identified a greater number of attractive features of the UK overall but also more frequently identified the UK's countryside, language and arts as factors contributing to its attractiveness.

The survey findings across the five countries have been summarised in Chart 9 to show which broad areas are identified most commonly as contributing to the UK's attractiveness.[16] This highlights culture (35 per cent) as the most commonly identified set of factors, followed by the economy (14 per cent), society (13 per cent) nature (12 per cent), cities (nine per cent), education and science (nine per cent), and people (seven per cent) as other important areas for the UK.

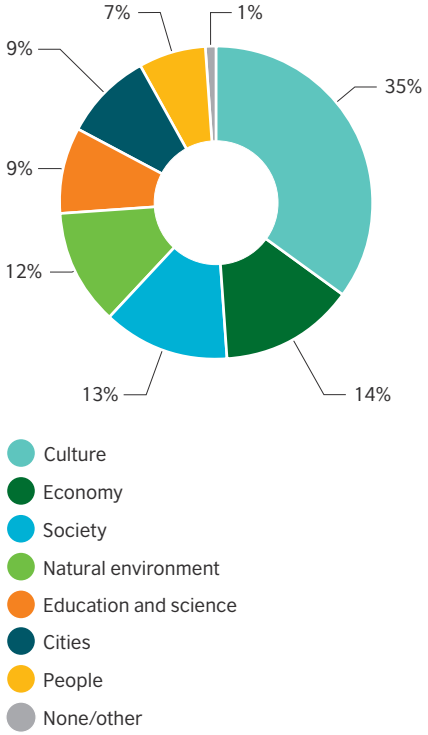
15. British Council (2012) *Trust Pays*. Available online: www.britishcouncil.org/organisation/publications/trust-pays
British Council (2013) *Culture Means Business*. Available online: www.britishcouncil.org/organisation/publications/culture-means-business
16. The share of responses was analysed for each category, rather than share of respondents, in order to scale the results to 100 per cent.

Chart 10 draws out precisely what is distinctive about drivers of the UK's attractiveness compared to countries in general. It plots the importance of individual factors chosen by respondents as contributing to the attractiveness of countries in general against their relative importance in contributing to UK attractiveness in particular.[17]

Factors towards the top of the chart are more widely perceived to make a major contribution to the attractiveness of countries in general. Factors to the right of the vertical line are perceived to be relatively more important contributors to the attractiveness of the UK compared to countries in general, while those to the left of the vertical line are relatively less frequently perceived to be important. This analysis shows very clearly a group of contributors to

Chart 9: Relative importance of different clusters in driving attractiveness of the UK

Question: Which, if any, of the following characteristics particularly contribute to making the UK attractive to you?



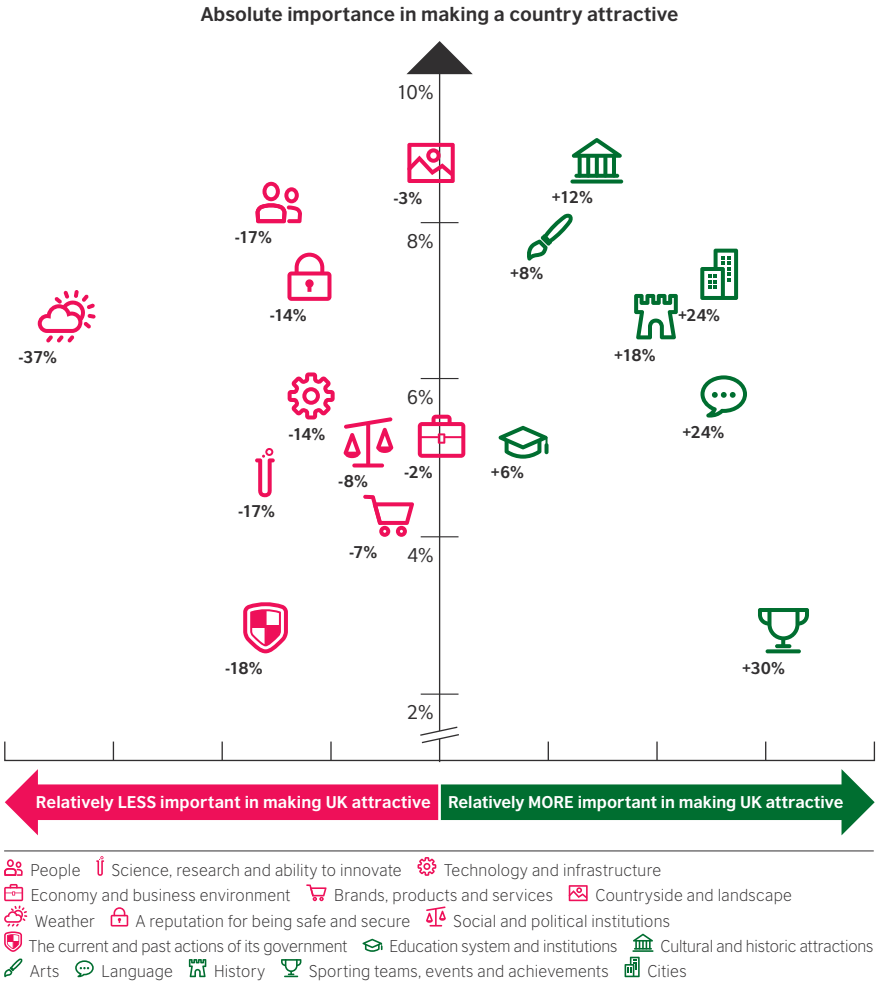
Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Percentages represent share of all responses. Any deviation from a total of 100 per cent is due to rounding of individual figures. See fold-out on page 30 for cluster definitions.

Chart 10: Comparison of the factors that influence UK attractiveness and the attractiveness of countries in general

Question 1: Which, if any, of the following characteristics particularly contribute to making a country attractive to you?

Question 2: Which, if any, of the following characteristics particularly contribute to making the UK attractive to you?



Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

The London Eye

attractiveness, which are more frequently cited as factors influencing the UK's attractiveness than for countries in general – its cities, language, history, education system and sports teams and achievements.

These results chime with the British Council's experience around the world. UK culture, cities, heritage, arts, education, English and sports are in great demand everywhere the British Council works. The UK government's GREAT campaign also successfully showcases these attributes.

Conversely, this analysis also highlights areas that are ranked as less important for the UK, compared to how respondents rate these areas in driving the attractiveness of countries in general. There is not much that can be done about the weather, but other factors identified here are areas in which the UK could work harder to improve international perceptions amongst young people. Important examples are business, science, and technology and infrastructure. The fact that these are key 'pillar' themes for the UK government's GREAT campaign is encouraging.

It is no great surprise that cities contribute to the UK's attractiveness. The UK has many great urban centres with strong appeal for investment and tourism based on their history, culture and economic vitality: London, Edinburgh, Cardiff, Belfast, Manchester, Birmingham, Glasgow and Liverpool to name just a few.

The role of London as an economic dynamo, a magnet for international talent and global hub for culture and innovation continues to grow. Recent figures released by the UK's Office for National Statistics in May 2014 suggest that London has now overtaken Paris as the most visited city in the world.[18] A 2013 study by Ipsos MORI across 24 countries placed London second only to New York as a favourite city in which to live, to visit or to do business.[19]

Chart 11: Places associated with contemporary UK arts and culture

Question: Can you name one example of a specific place associated with [...] contemporary UK arts and culture which you are personally interested in?

Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here are weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Open-ended question. Visual represents the top ten places mentioned for accessibility.

17. To make the comparison valid, the data was scaled by the percentage share of responses rather than respondents.
18. ONS Travel Trends (2013). Available online: www.ons.gov.uk/ons/rel/ott/travel-trends/2013/rpt-travel-trends--2013.html
19. Ipsos Top Cities Index, (2013). Available online: www.ipsos-mori.com/_assets/topcity/index.html

To explore the importance of places further, survey respondents were asked to state (unprompted) one 'place' associated with the UK's contemporary arts and culture that they were personally interested in. The results are shown in Chart 11 and demonstrate that London and its major attractions and sites of historic interest are by far the most frequently stated locations.

In addition to exploring the UK's strengths, the research also sought to identify those factors that make the UK unattractive to people in each of the countries surveyed. An open-ended question was therefore included to ask respondents what they felt was most unattractive about the UK. The results are shown in Chart 12.

It comes as little surprise that the 'weather', 'climate' and 'cold' were all frequently mentioned factors. But the fact that the UK's people were also relatively frequently cited as an unattractive feature might be a cause for concern, especially given that previous studies have suggested that people from the UK are often seen internationally as tolerant, diverse, broad-minded and open to new ideas from people around the world, and that perceptions of these issues are strongly linked to the development of trust in the UK and its people.[20] People factors will be explored in greater depth later in this report but it is important to note that people also features strongly in an unprompted list of factors that make the UK attractive. As common experience suggests, people generally, and individuals in particular, can have both positive and negative traits. Perceptions of peoples are often based on specific personal experience and it is common to hold both positive and negative perceptions of national populations simultaneously.

The prominence of food as a negative perception is perhaps surprising given the growing strength of the UK's vibrant food and drink sector which is gaining an increasingly strong international reputation and is an area in which exports are growing – up five per cent in 2013 alone to £12.8 billion.[21]

Chart 12: What makes the UK unattractive?

Question: What one thing, if anything, most makes the UK unattractive to you?

Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Open ended question asked of one in five survey respondents in each country. Visual represents the top 31 unattractive features mentioned for accessibility.

20. British Council (2012) *Trust Pays*. Available online: www.britishcouncil.org/organisation/publications/trust-pays
21. UK Food and Drink Export Snapshot Report (2013); UK Food and Drink Federation. Available online: www.fdf.org.uk/exports/ukexports.aspx

Henry Moore exhibition at the Museum of Contemporary Art in Skopje, Macedonia

SOURCES OF ATTRACTION

The British Council's own work focuses on sharing the English language and the best of UK arts, education, and society with people around the world, via establishing strong 'people-to-people' and institutional relationships between the people of the UK and people all around the world.

The present research, therefore, explores in more detail the role that culture, education and people play in informing perceptions of the UK. Understanding these factors will have implications for the British Council's own strategy, but will also be of interest to the UK's arts and education sectors, and will support UK governments and policy makers in understanding the contribution of these drivers to the UK's international standing and influence.

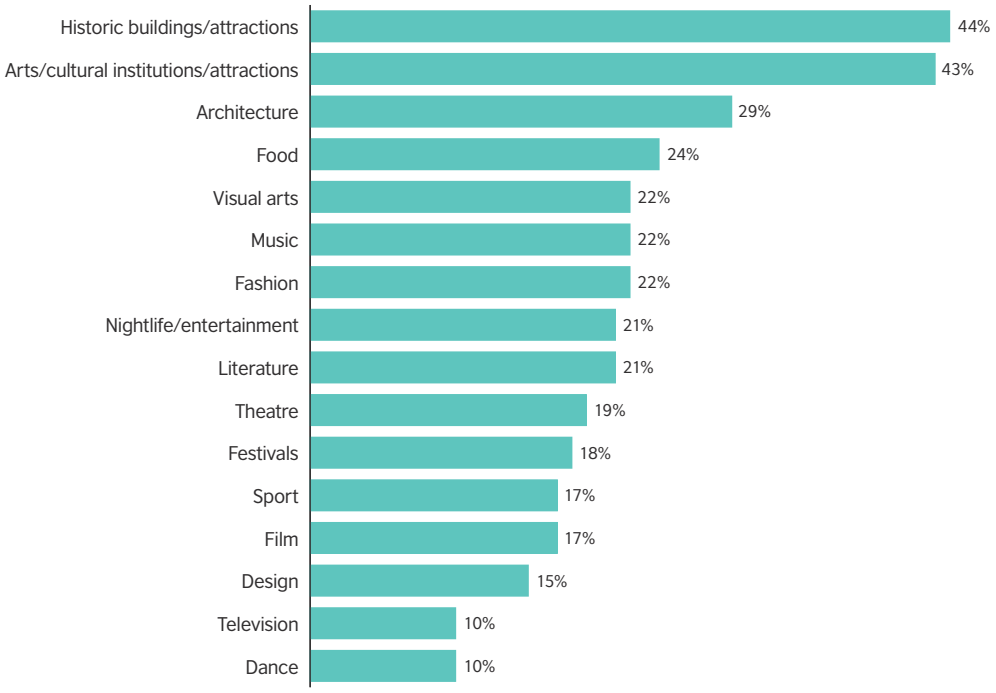
CULTURE

Culture is a broad concept which means many different things to different people. In order to understand how arts and culture contribute to the attractiveness of the UK, respondents were asked to identify, from a predefined list, different aspects of arts and culture which particularly contribute to making the UK attractive to them. As Chart 13 shows, historic buildings and attractions, and arts and cultural institutions, are by far the most frequently identified aspects.

Architecture ranks third on the list followed by food and a closely grouped set of other factors including the visual arts, music, fashion, nightlife and literature. UK food and eating habits are points which will be explored later in this report.

Chart 13: How people rank the UK's arts and cultural assets

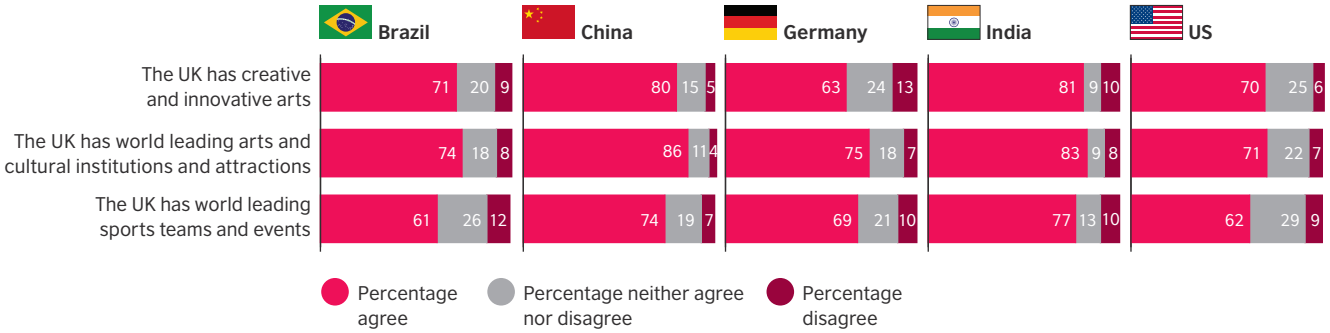
Question: Thinking about specific aspects of arts and culture in the UK, which, if any, of the following particularly contribute to making the UK attractive to you?



Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Chart 14: How people rate UK culture

Question: Thinking specifically about the UK, to what extent do you agree or disagree with the following statements?



Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Respondents were asked to rate the statements on an 11-point-scale where -5 represented 'strongly disagree' and +5 represented 'strongly agree'. This chart shows 'agree' and 'disagree' responses as grouped percentages respectively. Any deviation from a total of 100 per cent is due to rounding of individual figures.

Respondents were also asked whether they agreed with a number of statements about the strength of the UK's cultural and sporting sectors. The results are shown in Chart 14. These found high levels of agreement that the UK has strengths in these areas, with the most positive perceptions in China and India respectively.

To explore respondents' knowledge of and interests in major UK cultural figures, they were asked to name a specific person associated with contemporary UK arts and culture, in whom they were particularly interested. The results are shown in Chart 15.

By far the most frequently mentioned name was William Shakespeare, followed by Her Majesty Queen Elizabeth and David Beckham. It is perhaps not surprising that Shakespeare was identified by so many respondents, given his iconic global status as one of the writers who produced some of the most profound and enduring works

Chart 15: People associated with the UK's contemporary arts and culture

Question: Can you name one example of a specific person associated with [...] contemporary UK arts and culture which you are personally interested in?

Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Open ended question. Visual represents the top 16 names mentioned for accessibility.

of English literature. While as a person he can hardly be considered 'contemporary' (which the question explicitly referred to), his cultural value certainly is contemporary as he is still amongst the most widely read and studied British authors globally. Previous British Council research has shown that Shakespeare's work is studied in over 50 per cent of the world's schools.[22] It is clear that Shakespeare provides an important point of connection with the UK for millions of people around the world with his upcoming 400th anniversary in 2016, a particularly important moment for the UK.

Other names mentioned by respondents included Adele, the Beatles, Paul McCartney and Elton John, amongst others – showing the power of the UK music industry. JK Rowling, Banksy, Tracy Emin and Winston Churchill also feature, perhaps showing the power of the UK's potent mix of inspiring culture and history.

The prominence of royalty is also reflected in responses to another survey question, which explored respondents' view of what the UK should be proud of. The results are shown in Chart 17: the Royal Family came top – with universities, arts and culture, and history also scoring highly.

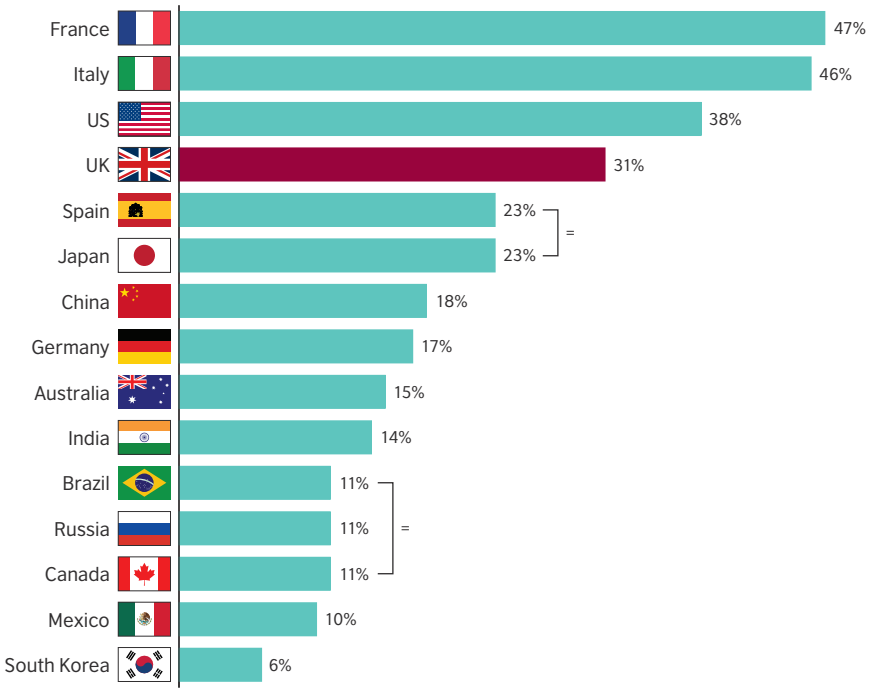
Ipsos MORI put similar questions to the UK public in a survey commissioned by Channel 4 in 2012. Interestingly, this research found that young Britons aged 15–34 placed British history and the armed forces top of a list of items that made them proud to be British, followed by the NHS. All three of these items were chosen ahead of the Royal Family.[23]

Having explored the role of culture in making the UK attractive to others, it is important to contextualise how attractive the UK's culture is by comparing it to other countries' cultural attractiveness.

Respondents were asked to identify the three countries they rated as most attractive for arts and culture out of the 15 top economies in the world. The responses produced a ranking topped by France, followed by Italy, the US and the UK in fourth place (see Chart 16). This suggests that despite the economic rise of the BRIC countries, and investment in cultural and soft power assets in many high growth economies, it is still European countries and the US that dominate the cultural attractiveness ranking.

Chart 16: The countries most attractive for their arts and culture

Question: Which three of the following countries do you find most attractive as a source of arts and culture?



Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Selected from a pre-defined list of the 15 largest economies in the world.

22. Royal Shakespeare Company and British Council (2012) *Shakespeare: a worldwide classroom.*
23. UK universities were not included in the Channel 4 survey.

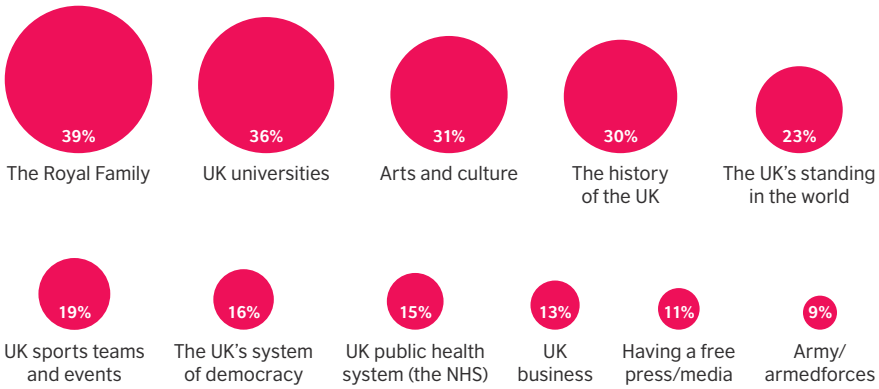
EDUCATION

A country's education system was identified by 32 per cent of survey respondents overall as being a factor in making a country attractive (see Chart 1). While this ranks lower than cultural factors and a number of other characteristics in determining attractiveness in general, it is six per cent more likely to be identified as a factor making the UK attractive by respondents overall and 13 per cent more likely again to be identified by respondents who express an interest in studying abroad (see Chart 10). UK universities are also considered by a large share of respondents to be something of which the UK can be proud, and in the list presented to respondents came second only to the Royal Family (see Chart 17).

As Chart 18 shows, when asked to rate the quality of UK universities and research, qualifications, schools, and creativity and innovation in the education system, the majority of respondents in all countries agree with the favourable statements offered. India is the most consistently positive, but particularly when it comes to the UK's world-class universities and research institutions, India's levels of positivity are nearly matched by China and Germany – with the US not far behind.

Chart 17: What people think the UK should be proud of

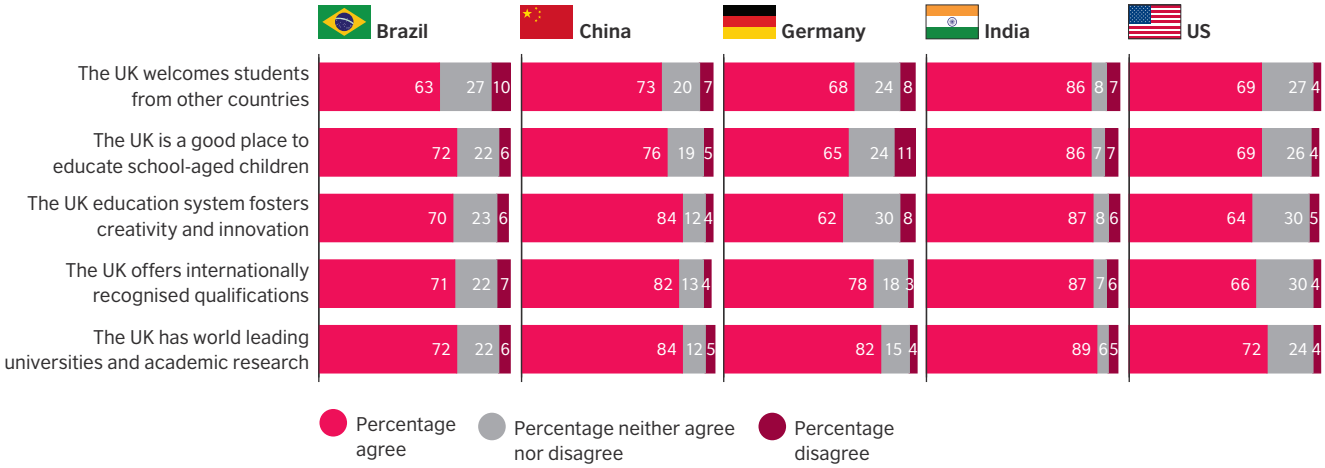
Question: Which three, if any, of the following do you think people in the UK have most right to be proud of?



Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Chart 18: How people rate UK education

Question: Thinking specifically about the UK, to what extent do you agree or disagree with the following statements?



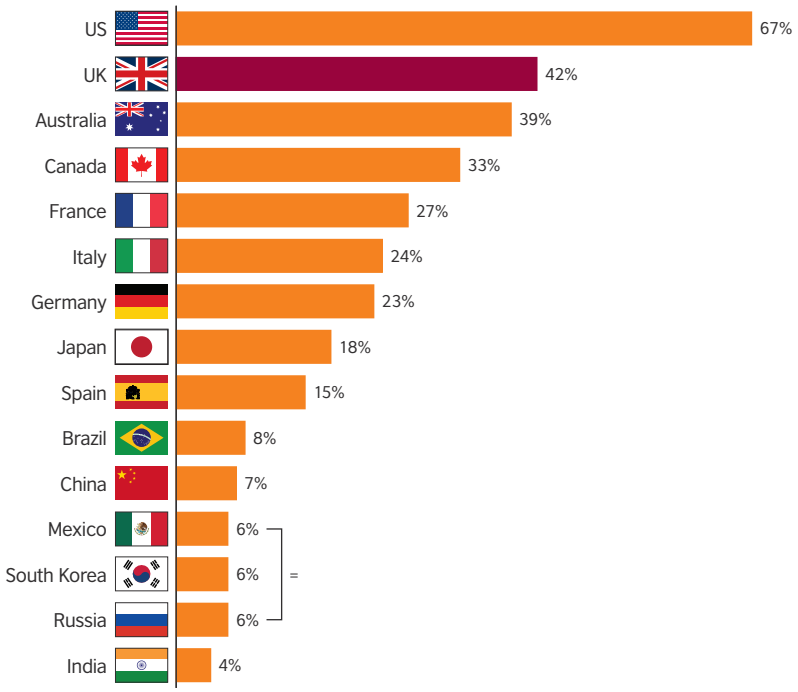
Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Respondents were asked to rate the statements on an 11-point-scale where -5 represented 'strongly disagree' and +5 represented 'strongly agree'. This chart shows 'agree' and 'disagree' responses as grouped percentages. Any deviation from a total of 100 per cent is due to rounding of individual figures.

The UK's perceived strength in education is something widely appreciated around the world. The UK's share of the world's top 100 universities is rivalled only by the US and it boasts an estimated 13 per cent share of internationally mobile students in higher education, again second only to the US which has 17 per cent.[24] The US is still considered by our survey respondents to be the most attractive country in which to study, with the UK in second place, not far ahead of Australia (see Chart 19). Interestingly, the top four places are held by English-speaking nations. This perhaps demonstrates the importance of the English language as an enabler of international education opportunities. The power of English is discussed in more detail in the British Council's 2013 publication, *The English Effect*.[25]

Chart 19: The countries most attractive as a place to study

Question: Which three of the following countries do you find most attractive as a country in which to study?



Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Selected from a pre-defined list of the 15 largest economies in the world.

24. OECD (2013) *Education at a Glance*. Available online: www.oecd.org/edu/eag.htm
25. British Council (2013) *The English Effect*. Available online: www.britishcouncil.org/organisation/publications/the-english-effect

PEOPLE

The results of this research have demonstrated that perceptions of the people of a country are one of the top three factors – identified by 59 per cent of respondents – contributing to national attractiveness (see Chart 1). However, in relative terms, 'people' appears to be a less important factor for the attractiveness of the UK than for countries in general, where it ranked an equal sixth with language – each identified by 30 per cent of respondents, (see Chart 7).

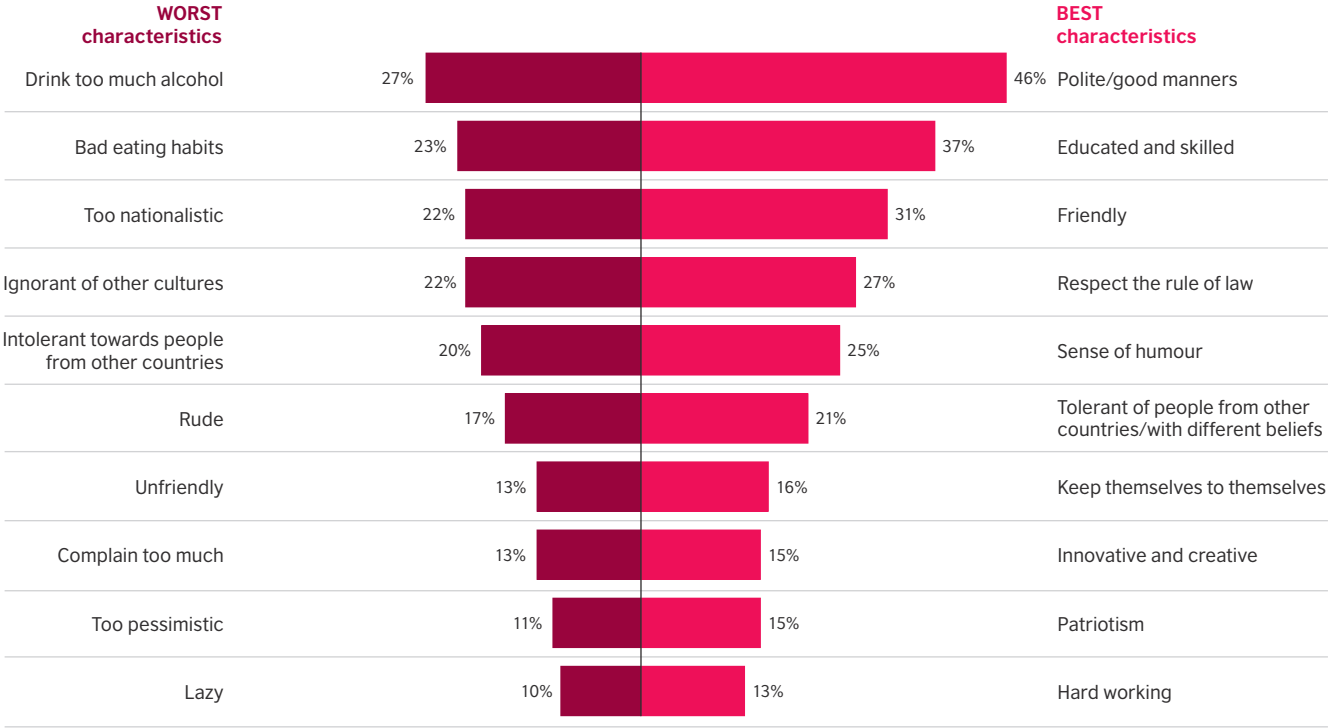
This could be partly caused by the UK possessing other factors – most notably education, arts, cultural and historic attractions, history, language, cities, and sport (see Chart 10) – whose role in driving attractiveness is greater than for countries in general. Therefore, it could be suggested that to some extent they displace the role of people. The comparatively low ranking of 'people' could also reflect the fact that when framed in terms of a specific country – the UK in this instance – the question elicits both positive and negative reactions.

Previous research[26] has shown that people from the UK have a reputation internationally for honesty and integrity, and that they are widely trusted by people from around the world. Research commissioned from Ipsos MORI by Channel 4 in 2012 found that 44 per cent of young British people (15–34 year olds) themselves identify a 'good sense of humour' as being among the best characteristics of British people as a whole, followed by 'friendly' identified by 38 per cent and 'hard-working' identified by 32 per cent.[27] The same research by Ipsos MORI also provides some reference points for what people from the UK consider to be the less attractive characteristics of the UK population. Dominating that list was 'drink too much', identified by 49 per cent of

Chart 20: Perceptions of the best and worst characteristics of people in the UK

Question 1: Thinking about the people from the UK, from this list, which three, if any, do you think are the worst characteristics from the UK as a whole?

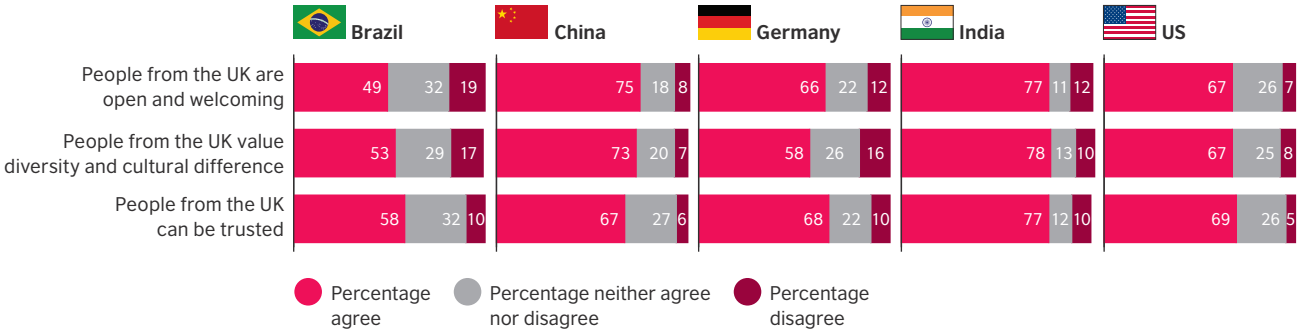
Question 2: Thinking about the people from the UK, from this list, which three, if any, do you think are the best characteristics from the UK as a whole?



Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Chart 21: How the people of the UK are rated

Question: Thinking specifically about the UK, to what extent do you agree or disagree with the following statements?



Base: Five-country data (5,029); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Respondents were asked to rate the statements on an 11-point-scale where -5 represented 'strongly disagree' and +5 represented 'strongly agree'. This chart shows 'agree' and 'disagree' responses as grouped percentages respectively. Any deviation from a total of 100 per cent is due to rounding of individual figures.

young British people as being among their worst characteristics, followed by 'ignorant of other cultures', identified by 28 per cent, and 'complain too much' and 'lazy', both identified by 26 per cent.

This makes for an interesting comparison against the perceptions of UK people held by young educated people in the five survey countries. Certainly people from the UK are perceived internationally to be friendly and praised for their sense of humour, but above all esteemed for their politeness and good manners. They are also highly regarded in terms of their education and skills, and respect for the rule of law. This is shown in Chart 20. However, survey respondents identified drinking too much alcohol as the most commonly selected negative characteristic (27 per cent). Alongside alcohol, a significant minority of 23 per cent of respondents regard Britons as having poor eating habits. More concerning, around one in five international respondents identify cultural ignorance, nationalistic tendencies and intolerance as ranking among the three worst characteristics of people from the UK.

Responses to a number of predefined statements presents a more positive picture see (Chart 21). When asked if they thought people from the UK value diversity and cultural difference; people from the UK are friendly and welcoming; and people from the UK can be trusted, the majority of respondents in most countries agreed. Only in Brazil were those who agreed with the first statement in the minority.

Due to the exponential growth in international travel and in electronic communications, international perceptions – whether of the UK or elsewhere – will increasingly be based on direct experience rather than second-hand or anecdotal evidence. Given the growing importance of this direct experience, the data was also analysed to explore views of respondents who had been to the UK compared with those who had not been to the UK.

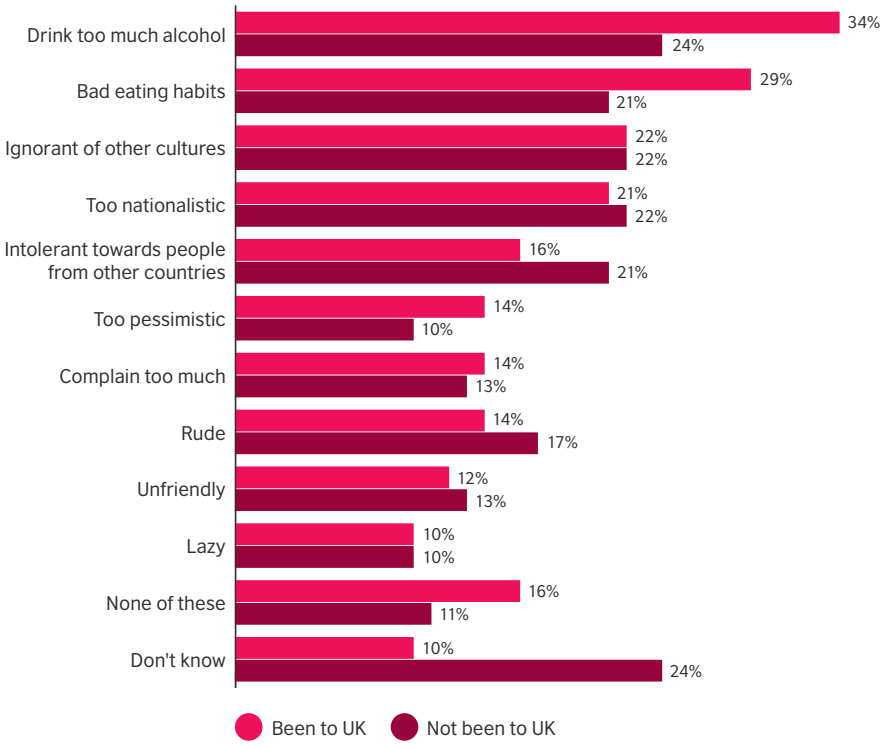
26. British Council (2012) *Trust Pays*. Available online: www.britishcouncil.org/organisation/publications/trust-pays
27. Ipsos MORI for Channel 4 (2012), 'Britishness Poll'. www.channel4.com/info/press/news/britons-are-prouder-of-their-history-nhs-and-army-than-of-the-royals

Not surprisingly, people who haven't been to the UK are less likely to express an opinion, reflected in the relatively high share of 'don't knows'. However, as Chart 22 shows, the negative perceptions around British drinking and eating habits are even stronger among those who have been to the UK than among those who have not.

More encouragingly, those who have been to the UK are less negative about some of the perceived negative traits – including perceptions of nationalism and intolerance (see Chart 22). It appears that in these areas the negative British reputation abroad may be remedied to some extent by the direct experiences of people who visit the UK.

Chart 22: How personal experience affects negative perceptions of the people from the UK

Question: Thinking about the people of the UK, from this list, which three, if any, do you think are the worst characteristics of people from the UK as a whole?



Base: Five-country data (5,029), 'Been to the UK' (1,280) and 'Not been to the UK' (3,749); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Analysis comparing perceptions of respondents who had been to the UK with those who had not.

Despite the issues discussed above, overall, when assessing perceptions of the UK's people compared to other countries the results are very positive. The UK ranks second only to the US in terms of a country which is attractive for the development of personal contacts, and second after Canada for a country with 'people you can trust'. This is shown in Chart 23.

Overall, when it comes to the attractiveness of its people in general, the UK comes second only to the US (see Chart 24).

Chart 23: Personal contacts and trust – country ranking

Question: Which three of the following countries do you find most attractive for making personal contacts and friendships?

Question: Which three of the following countries do you find most attractive as a country whose people can be trusted?

	PERSONAL CONTACTS	PEOPLE YOU CAN TRUST
1	US (62%)	Canada (42%)
2	UK (39%)	UK (39%)
3	Australia (36%)	Australia (36%)
4	Canada (32%)	US (36%)
5	France (26%)	Germany (30%)
6	Italy (23%)	Japan (28%)
7	Spain (20%)	France (25%)
8	Germany (20%)	Italy (20%)
9	Japan (15%)	Spain (15%)
10	Brazil (11%)	China (11%)
11	Mexico (10%)	South Korea (10%)
12	Russia (9%)	Russia (9%)
13	South Korea (8%)	Brazil (9%)
14	China (8%)	India (7%)
15	India (5%)	Mexico (7%)

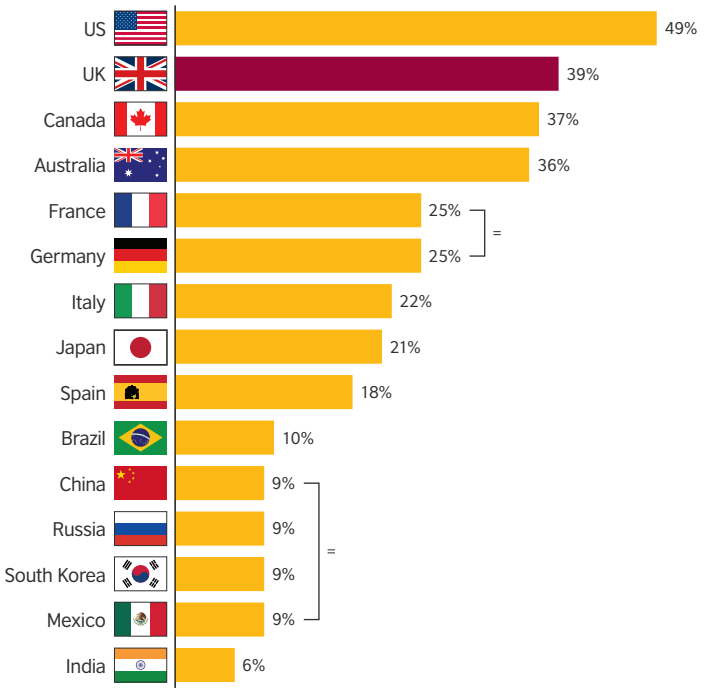
Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Selected from a pre-defined list of the 15 largest economies in the world.

Chart 24: The countries most attractive based on their people

Question: Which three of the following countries do you find most attractive for making personal contacts and friendships?

Question: Which three of the following countries do you find most attractive as a country whose people can be trusted?



Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Selected from a pre-defined list of the 15 largest economies in the world.
The chart shows the combined results for these two questions.

Wales Millennium Centre, Cardiff

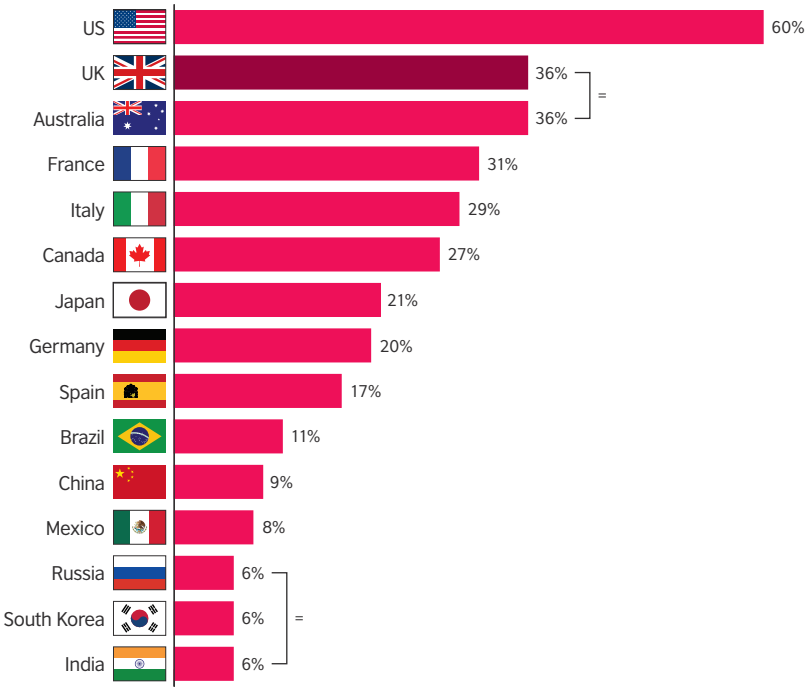
NATIONAL COMPARISON

In the context of a study that set out to explore the role of different factors driving countries' attractiveness and to examine how and which aspects of culture, education and people contribute to a country's attractiveness in the eyes of young people across the world, it was impossible not to ask respondents which countries they found the most attractive overall. Respondents were presented with a list of the 15 largest economies in the world and asked to choose the three they found most attractive overall. The results, in Chart 25, show a ranking with the US taking first place, but the UK comes joint second with Australia.

This is an excellent ranking for the UK and in line with its position among the top-rated countries in other league tables and soft power indices. The Institute for Government, based on an analysis of soft power assets rather than perceptions, placed the UK in second place behind Germany in 2013. The Anholt-GfK Roper Nation Brands Index™ placed the UK fourth in 2013, behind the US, Canada and Germany.

Chart 25: The most attractive countries overall

Question: Which three of the following countries do you find most attractive overall?



Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Selected from a pre-defined list of the 15 largest economies in the world.

CONCLUSIONS AND RECOMMENDATIONS

Much of the soft power literature and many studies to date have placed significant importance on business brands and the actions of governments as determinants of a country's soft power. There is no doubt that these are important factors. However, this research has found that for young educated people in countries of strategic importance to the UK, these factors appear to be less important than culture, countryside and landscape, cities, and people in determining a country's attractiveness. Given the importance attributed to them by young people across the world, there is a strong case that they should feature more prominently in future models conceptualising soft power and attempts to enhance the UK's international engagement and standing. This has significant implications for UK policy makers concerned with soft power.

The research presented here demonstrates that culture – encompassing cultural and historic attractions and arts – is the most frequently cited factor in making countries in general, and the UK in particular, attractive to others. Countryside and landscape, and people, also score particularly highly. These factors appear to play an important role in determining people's views of a country regardless of their country of origin, their gender or their connection with, and knowledge of, the UK.

In many ways the factors that influence UK attractiveness in the eyes of survey respondents are similar to countries in general. But some factors are more important and some less important for the UK compared with other countries. Sport, cities, language, history, cultural attractions, arts and education rank as more important, whereas weather, people and a range of other factors rank as less important in the case of the UK.

In terms of overall attractiveness the UK is highly regarded overall, ranked in joint second place with Australia after the US.

The combination of this research, on-the-ground experience and the UK government's current focus suggest there is a real convergence of views regarding the particular strengths and assets which the UK should continue to showcase and share to further enhance its own attractiveness. It will be important to continue to invest in these to ensure the UK's continuing soft power strength.

RECOMMENDATIONS

To make the most of its assets and enhance its attractiveness, the UK would be well advised to continue to invest and support successes in areas where it has distinctive appeal as well as those factors that generally contribute strongly to a country's attractiveness. The UK's arts and culture, its cities, and its education system are perhaps the most striking examples.

To further enhance its international attractiveness and soft power, the UK should:

1. Know its strengths. Recognise that factors such as cultural and historic attractions, cities, countryside and landscape, arts, and history are the strongest factors in its international appeal to young people around the world. These areas should therefore be central to future thinking about the UK's soft power and efforts to promote the UK internationally to young people.
2. Support and invest in its areas of strength. Continue to invest in, and create the conditions for, the success of key areas of strength which are significant drivers of international attractiveness. These include the UK's excellent arts and cultural institutions and historic attractions, its arts sector and its education system.
3. Recognise the international attractiveness of UK arts in particular: Continue to invest in the UK's arts, creative and cultural sectors to secure the skills to attract international talent and collaboration and maintain the capacity for excellence in the future.
4. Recognise its weaknesses: Consider the mixed perceptions of the UK's people, science, technology/ infrastructure and other factors and consider whether further steps can be taken to improve international perceptions.
5. Let people and institutions do the talking: Recognise that government is in itself not a major driver of countries' international attractiveness. The UK's soft power will be best enhanced via the actions of cultural institutions and actors – including the ordinary and extraordinary people of the UK – who embody UK culture.
6. Develop UK young people's international awareness: Encourage young people to see themselves as ambassadors for the UK and ensure that they are aware of the importance of perceptions of the UK's people around the world and continue to equip them with the international skills, experience and language abilities to engage internationally and support UK attractiveness in the future.

APPENDIX

ABOUT THE RESEARCH

The survey underpinning this publication was undertaken between December 2013 and January 2014 by Ipsos MORI on behalf of the British Council. Analysis was provided by In2Impact.

The countries surveyed by Ipsos MORI were Brazil, China, Germany, India, the US and Great Britain. The attractiveness of each country was assessed excluding respondents from that country.

In each country, the sample included at least 1,000 18–34 year olds who had a minimum of secondary education.

Ipsos MORI conducted the surveys among online panels in these countries in the local languages. The data was weighted on gender and age to reflect the population profiles.

COUNTRY	SAMPLE
Brazil	1,003
China	1,007
Germany	1,003
India	1,006
Great Britain	1,022
US	1,010
Total	**6,051**

STATISTICAL SIGNIFICANCE OF THE ANALYSIS

The individual sample size for the research in each country was just over 1,000.

Where Great Britain is excluded and combined data from the other five countries is shown in this report, the combined sample size is 5,029 and where combined six country data is shown the combined sample size is 6,051.

Sub-sample sizes are shown where relevant. These are generally over 1,000 and in no case are they lower than 100.

To give an indication of the statistical significance of individual results presented in this report we show below the approximate confidence interval applying at a confidence level of 95 per cent for a result of 50 per cent generated from different sample sizes within a population:

SAMPLE SIZE	ASSUMED PERCENTAGE CHOOSING RESPONSE	CONFIDENCE INTERVAL (+/-)
6,000	50%	**1.3%**
5,000	50%	**1.4%**
3,000	50%	**1.8%**
1,000	50%	**3.1%**
500	50%	**4.4%**
100	50%	**9.8%**

ADDITIONAL CHARTS: COUNTRY AND GENDER BREAKDOWN

Chart A: Factors of attractiveness as rated by different countries

Question: Which, if any, of the following characteristics particularly contribute to making a country attractive to you?

	BRAZIL	CHINA	GERMANY	INDIA	UNITED STATES	UNITED KINGDOM
1	71%	59%	75%	54%	61%	69%
2	65%	58%	71%	53%	57%	64%
3	64%	56%	66%	51%	57%	63%
4	61%	52%	65%	51%	52%	62%
5	61%	51%	49%	49%	51%	62%
6	60%	43%	46%	47%	49%	57%
7	57%	43%	46%	46%	47%	53%
8	55%	35%	45%	45%	41%	47%
9	51%	35%	44%	45%	35%	38%
10	51%	33%	32%	43%	26%	32%
11	47%	33%	27%	41%	23%	26%
12	47%	33%	23%	38%	21%	20%
13	40%	31%	22%	36%	20%	20%
14	38%	27%	22%	35%	18%	20%
15	37%	22%	20%	33%	17%	19%
16	18%	22%	15%	25%	17%	17%
17	18%	18%	15%	22%	13%	17%

Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Multiple selections were possible. Findings are presented as percentage of respondents selecting each factor.

Chart B: Factors of attractiveness as rated by gender

Question: Which, if any, of the following characteristics particularly contribute to making a country attractive to you?

	FEMALE	MALE
1	67%	56%
2	65%	55%
3	63%	55%
4	58%	49%
5	55%	48%
6	53%	46%
7	51%	44%
8	47%	44%
9	44%	42%
10	33%	36%
11	33%	35%
12	32%	33%
13	30%	33%
14	27%	31%
15	27%	26%
16	19%	23%
17	12%	20%

Base: Six-country data (6,051); 18–34 year olds in Brazil (1,003), China (1,007), Germany (1,003), India (1,006), US (1,010), GB (1,022); Fieldwork December 2013 – January 2014. Data presented here is weighted to relevant national populations. Source: Fieldwork – Ipsos MORI; Analysis – In2Impact.

Note: Multiple selections were possible. Findings are presented as percentage of respondents selecting each factor.

KEY TO ICONS AND CLUSTERS

The survey asked detailed questions about perceptions of different countries and aspects of countries' characteristics and qualities. In some of the charts these have been represented as icons or grouped into clusters as set out in the table below:

WHAT MAKES A COUNTRY ATTRACTIVE	ICON	CLUSTER
People (e.g. their attitudes and behaviours)		People
Education system and institutions		Education and science
Science, research and ability to innovate		
Cultural and historic attractions		Culture
Arts (e.g. music, theatre, literature, visual arts, film)		
Language		
History		
Sporting teams, events and achievements		
Technology and infrastructure		Economy
Economy and business environment		
Brands, products and services		
Countryside and landscape		Natural environment
Weather		
A reputation for being safe and secure		Society
Social and political institutions (e.g. media, laws, justice system, civil service, health service, system of government)		
The current and past actions of its government		
Cities		Cities

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