UNIVERSITY OF CAMBRIDGE

Centre for the Future of Democracy

A World Divided

Russia, China and the West

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1. Executive Summary

- In this report, we examine how worldwide attitudes towards the major international powers – China, Russia, and the United States – are shifting in the wake of the Ukraine war, China's rising assertiveness, and recent challenges to American democracy.
- We do so by harmonising and merging data from 30 global survey projects that collectively span 137 countries which represent 97% of world population. This includes 75 countries surveyed since the Russian invasion of Ukraine, giving us updated insights into the current views of 83% of all people across the globe.
- As a result, our analysis covers not only high-income democracies but also a comprehensive coverage of emerging economies and the Global South – revealing a marked divergence between the two.
- On the one hand, western democracies stand more firmly than ever behind the United States. Not only that, but the war in Ukraine has galvanised democratic societies worldwide – as the peoples of upper-income democracies in South America, the Asia-Pacific, and Eastern Europe have also moved to a more pro-American stance.
- However, across a vast span of countries stretching from continental Eurasia to the north and west of Africa, we find the opposite – societies that have moved closer to China and Russia over the course of the last decade. As a result, China and Russia are now narrowly ahead of the United States in their popularity among developing countries.
- While the war in Ukraine has accentuated this divide, it has been a decade in the making. As a result, the world is torn between two opposing clusters: a maritime alliance democracies, led by the United States; and a Eurasian bloc of illiberal or autocratic states, centred upon Russia and China.
- We suggest that this new cleavage cannot be reduced to simple economic interests or geopolitical convenience. Rather, it follows a clear political and ideological divide. Across the world, the strongest predictors of how societies align respective to China or the United States are their fundamental values and institutions – including beliefs in freedom of expression, personal choice, and the extent to which democratic institutions are practised and perceived to be legitimate.

2. Key Findings

The world has divided into liberal and illiberal spheres. Among the 1.2bn people who inhabit the world's liberal democracies, three-quarters (75%) now hold a negative view of China, and 87% a negative view of Russia. However, for the 6.3bn people who live in the rest of the world, the picture is reversed. In these societies, 70% feel positively towards China, and 66% positively towards Russia.

Perceived democratic shortcomings are associated with greater public receptivity towards authoritarian powers. A majority of the public is dissatisfied with democratic performance in 7 out of 10 (69% of) countries that are majority-favourable to Russia. Meanwhile, a majority feels positively towards China in three-quarters (73%) of countries that are majority-dissatisfied with how their democracy is performing.

China is now ahead in the developing world. For the first time ever, slightly more people in developing countries (62%) are favourable towards China than towards the United States (61%). This is especially so among the 4.6bn people living in countries supported by the Belt and Road Initiative, among whom almost two-thirds hold a positive view of China, compared to just a quarter (27%) in non-participating countries.

However this boost in approval across the Global South has come at the cost of a dramatic collapse in support in developed nations. Whereas just five years ago, two in five (42%) western citizens held a positive view of China, today the figure is just half that amount (23%).

Russia too has lost its "fringe" support within western democracies. Over the course of the last decade, the proportion of western citizens with a positive view of Russia had already fallen from two in five (39%) to less than a quarter (23%) by the eve of the 2022 invasion of Ukraine – and now stands at just one in eight (12%). Russia has also lost any "leverage points" among formerly sympathetic European countries, including Greece (down from 69% to 30% favourable), Hungary (from 45% to 25%) and Italy (from 38% to 14%). In spite of Russian efforts at fostering disinformation and ties to extremist parties, the country enjoys little support from within western electorates.

However, the real terrain of Russia's international influence lies outside of the West. 75% of respondents in South Asia, 68% in Francophone Africa, 62% in Southeast Asia continue to view the country positively in spite of the events of this year.

3. Introduction – A World Divided

On February 22nd, 1946, the American *chargé d'affaires* in Moscow, George Kennan, sent an 8,000 word message to his superiors in Washington DC. This "long telegram," as it was later known, warned of a fundamental difference in worldview between Soviet and American leaders. Rather than settle for "peaceful coexistence," the Soviets would seek to expand their global influence, leading the United States to respond and countries to divide into rival competing blocs. Kennan's message offered the first warning of a new kind of geopolitical rivalry: one that was not only economic or strategic, but diplomatic, scientific, and ideological.

It took another two years before Kennan's prediction finally came to pass. But in 1948 the Soviet Union announced a blockade of West Berlin, the last island of Allied control in its domain. For the next twelve months, western democracies rallied to deliver airborne relief to the encircled city, and though the Soviets eventually backed down, it was not before twelve had signed the North Atlantic Treaty in Washington DC. In this way the NATO alliance was born – which, together with the formation of Soviet satellite regimes in Eastern Europe, cemented a division of the world that would endure a further four decades.

A New Global Divide?

In this report, we ask a simple question: in the wake of the war in Ukraine, is the world now experiencing a similar moment of great power division – and if so, where are different societies situated respective to these countries, and why have they divided as they have? We provide an answer by looking at public opinion data from across the world, from surveys asking respondents about their feelings towards geopolitical rivals, and use this to identify when, where and ultimately why this new global divide has emerged.

In many respects, the aftermath of the Ukraine invasion has been similar to the months that followed the Berlin Airlift. In February of this year – almost 76 years to the day after Kennan's long telegram – Russian president Vladimir Putin announced a "special military operation" to "demilitarise" and "denazify" Ukraine. The response to Russian aggression has galvanised the world: western countries have been unanimous in their support for Ukraine, though elsewhere

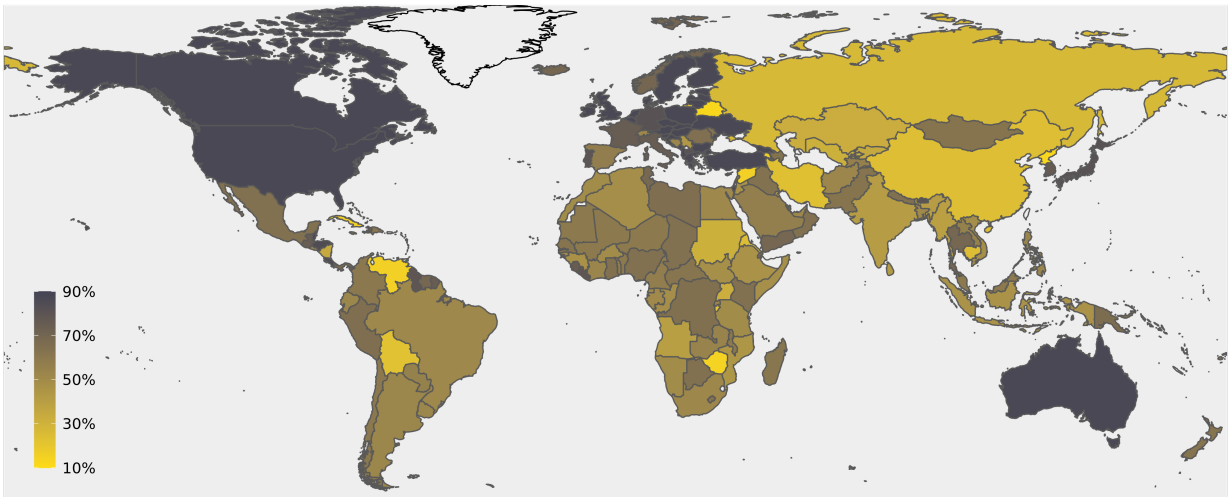


Figure 1: *Index of country votes to condemn Russia in the United Nations, from 2014–2022 inclusive. The pattern of diplomatic activity maps closely to the distribution of global public sentiment towards Russia. Western countries have maintained a consistent demand to sanction Russian aggression, while continental Asian countries have been opposed, and the rest of the world in-between. Key votes include the 2014 UN resolution on the territorial integrity of Ukraine, the 2022 UN resolution on aggression against Ukraine, and 2016-21 votes on human rights in Crimea and militarisation in Crimea and the Black Sea.*

countries have chosen to remain neutral or support Russia (Figure 1). This has been reflected by international diplomacy this year at the United Nations General Assembly. In a meeting on whether to suspend Russia from the Human Rights Council, for example, 24 countries voted against the resolution and 58 nations abstained – with key countries such as India, Brazil, South Africa, Mexico, and Indonesia choosing to remain neutral.

Behind these differences in how states and diplomatic actors have responded to Russia's actions in Ukraine, however, lies a more fundamental divide. That is a difference of opinion: not only between leaders, but across societies. For if we look at a map of how different peoples around the global feel towards Russia, we discover an almost identical reflection of how their governments have handled the country diplomatically since 2014 (Figure 2). This suggests that responses by world governments to Russian actions are motivated by more than mere tactics, interests, or opportunism, but reflect a broader divergence in how societies situate their own place relative to the world's great powers.

The same is true of how societies across the world have reacted to Russia's invasion of Ukraine this year. We can examine this by looking at how perceptions of Russia changed from 2021 to 2022. Figure 3 shows this latest annual shift in the proportion of respondents, by country, who hold a positive view of Russia. In countries where a majority of citizens held negative views of Russia in 2021, the negative sentiment only increased in 2022. By contrast, in countries with a higher share of citizens holding positive views of Russia, we find changes in all directions. In some countries favourable views of Russia remained stable (Indonesia and Egypt) or decreased to a small extent (Vietnam, India, Morocco). We find larger drops in popularity in Nigeria, Iran, and to a greater extent, Bulgaria and Mexico, which turned the previously majority of citizens with positive views into a minority in these countries. In contrast to these, Russia retains the sympathy of a substantial segment of the population in China, Pakistan, Saudia Arabia and Malaysia.

In short, reactions to Russia's invasion of Ukraine – whether among diplomats or the general public – are indicative of a much deeper divergence of world-outlooks. That divide is between societies which have aligned behind the United States to challenge the return of authoritarian great powers – and those which seek to either remain neutral, or are being drawn into a new Eurasian sphere of influence that is centred in part by Russia, but above all, by China.

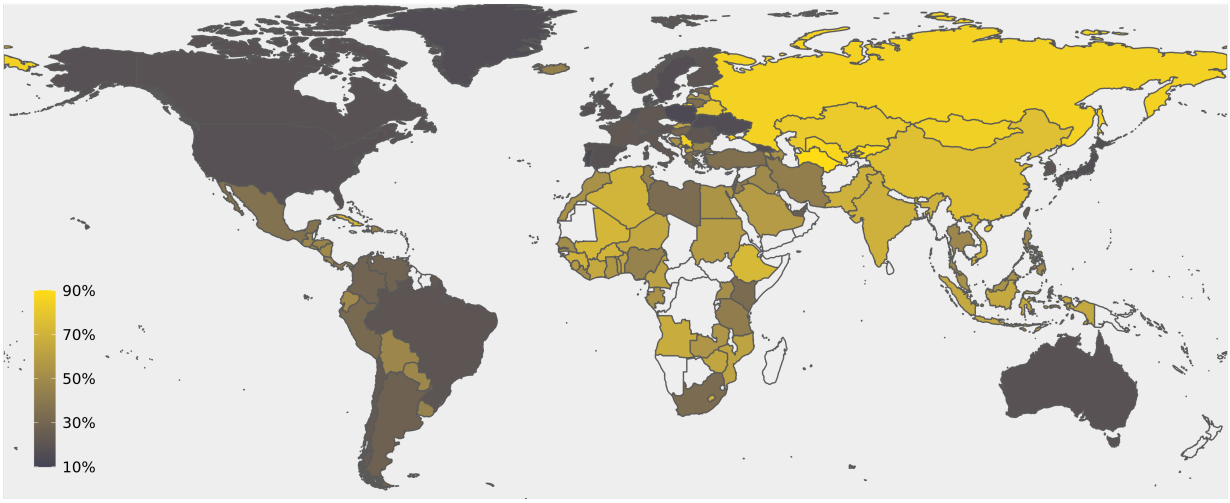


Figure 2: *Positive view of Russia, 2022 (or most recent survey, %). Over the course of the last decade, global public opinion towards Russia has polarised, with large majorities of the public in high-income democracies holding negative views, while pro-Russian sentiment persists across continental Asia, the Middle East and Africa.*

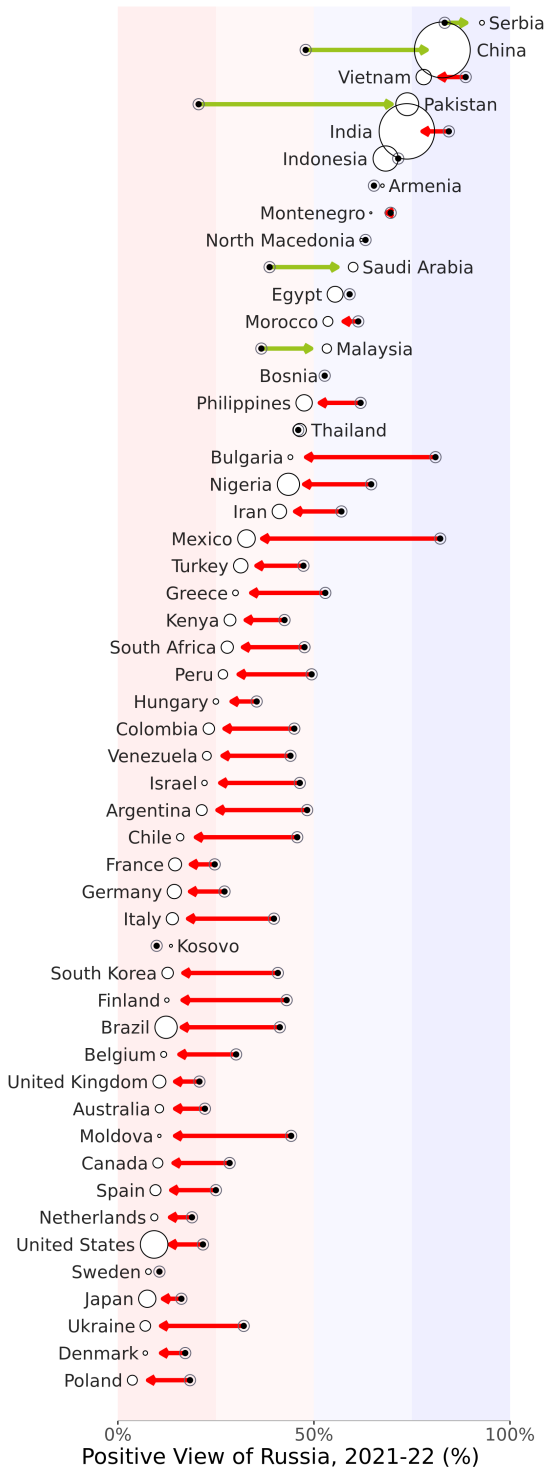


Figure 3: *Change in public favourability towards Russia, 2021–22. Across all countries, a clear majority of the public views Russia negatively, and this proportion has increased in 2022. Nonetheless, attitudes remain positive across continental Asia, including China, South Asia, Southeast Asia, and the Middle East.*

The Research Background

Several recent studies have examined how publics across the world are responding to the war in Ukraine. The Pew Research Center has led research on this topic for more than a decade, and in a survey of 17 countries this year found that ratings for Russia and its President Vladimir Putin had plummeted, whereas attitudes towards the NATO alliance had improved.[1] Pew researchers also reported an increase in unfavourable attitudes towards China, in particular in the wake of the COVID-19 pandemic.[2] Another study conducted by *Latana* for the Alliance of Democracies Foundation in May of 2022, found widespread support across 54 countries for western efforts to help Ukraine. Though when asked if their own country should be prepared to cut economic ties with either Russia or China in the future, only the citizens of western democracies agreed, whereas respondents elsewhere did not.[3] Finally, a number of regional surveys completed during the pandemic have noted China's continuing influence, including the latest wave of Afrobarometer surveys in sub-Saharan Africa,[4] and the Arab Barometer in the Middle East.[5]

Our Contribution

This report builds upon earlier research by harmonising and combining datasets, allowing us to achieve a comprehensive outlook on how attitudes are changing over time – both in response to recent events such as the war in Ukraine, but also to situate those shifts in the context of longer-term trends over the course of the last decade. By ensuring a representative snapshot of public opinion from across the world, our goal is to obtain the most accurate possible overview of the state of global public opinion – without excluding any major region, society, or culture.

[1] Richard Wike, Janell Fetterolf, Moira Fagan & Sneha Gubbala (2022). *International Attitudes Toward the U.S., NATO and Russia in a Time of Crisis*. Pew Research Center

[2] Laura Silver, Christine Huang & Laura Clancy (2022). *How Global Public Opinion of China Has Shifted in the Xi Era*. Pew Research Center.

[3] Latana/Alliance of Democracies (2022). *The Democracy Perception Index 2022.*

[4] Josephine Appiah-Nyamekye Sanny & Edem Selormey (2021). "Africans Welcome China's Influence but Maintain Democratic Aspirations." Afrobarometer Dispatch No. 489.

[5] Michael Robbins (2021). "Fragile Popularity: Arab Attitudes Towards China." *Manara Magazine*.

4. The Data

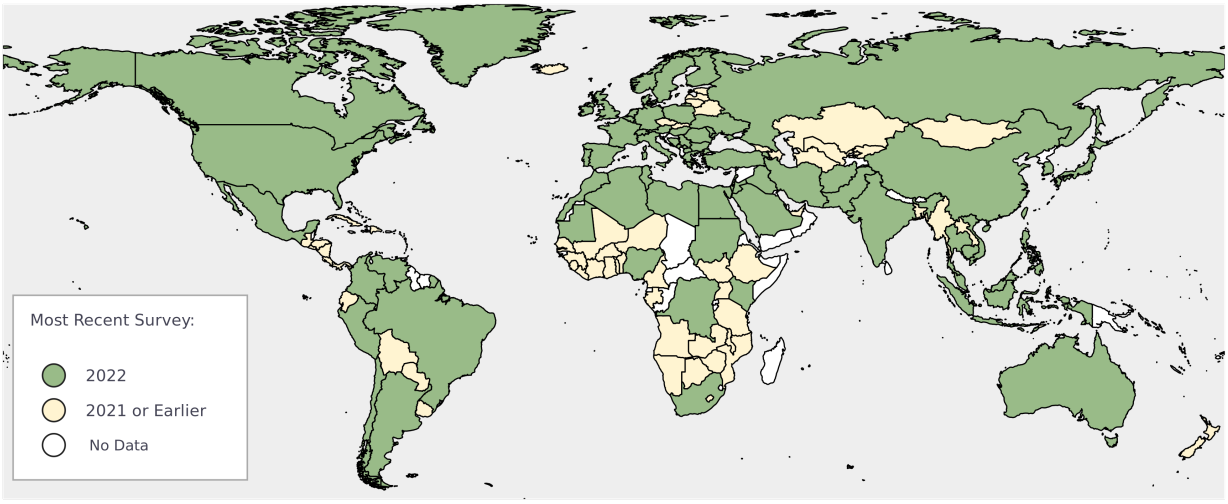


Figure 4: *Countries with harmonised and pooled time-series data on attitudes to Russia, China and the United States that were included in this project. For the overwhelming majority of countries, we include data that was collected during the year of the Ukraine conflict (2022), representing the current views of 83% of global population. For most other countries, data is available from 2021.*

Our reports are built upon a simple premise: to combine data from the widest possible range of available sources, in order to obtain information from every region of the world, over the longest possible period of time. In this report, we do so by harmonising data from 30 available survey projects. In each of these, respondents from a range of countries at different times were asked their opinion about major world powers. By combining surveys together, we are able to track public geopolitical preferences from a total of 137 countries – representing 97% of the global population (Figure 4).

In addition, by scoping for additional polls conducted since February of 2022, we are able to see how the Russian invasion of Ukraine has shifted public opinion in a total of 75 countries. Societies for which we could find 2022 data represent 83% of world population, offering us to a truly global insight into how global allegiances and sentiments were affected by the events of this year.

More Data, Less Problems

The advantages of a data harmonisation approach are several. First, it allows us to provide a fully-comprehensive analysis of global public opinion that is not biased by a disproportionate focus on countries from which it is easier to obtain data. This is important because, in comparative survey research, data is very rarely "missing at random." The countries from which we lack data are nearly always developing economies. Therefore, we engage in a comprehensive scoping process to ensure that all regions of the world are reflected in our analysis. This includes many difficult-to-reach societies such as the Democratic Republic of Congo, East Timor, or Mali, as well as surveys that were conducted this year in non-democratic regimes such as Taliban-ruled Afghanistan, Venezuela, Iran, and Sudan (Figure 4).

Second, a data harmonisation approach allows us to minimise error. Because we can average results from two or more polling observations accessible from any given country in a given year, this prevents our results being unduly skewed by "rogue polls" – individual surveys which due to errors in translation, fieldwork, or coding, report erroneous results. Finally, combining data from multiple sources allows us to take the "long view" – not only offering a snapshot of how public

opinion stands today, but also setting this information in the context of longer-term trends. As we shall see, this is especially important when seeking to understand shifting global allegiances towards Russia, China and the United States – as different world regions have been diverging now for the better part of a decade.

Data Quality and Interpretation

Inevitably, a data harmonisation approach also brings challenges. The first is to avoid combining "apples" and "oranges" – that is, to ensure that survey items are comparable in meaning and scales. Sections I and II of the Appendix provide more information on item selection, diagnostic tests and sources. Second, when aggregating data it is important to be aware of potential "correlated bias" across sources. With respect to the current report, this could be case, for example, if respondents in non-democratic countries consistently felt reluctant to express opinions out of line with their governments. However, respondents seem relaxed in offering opinions about countries other than their own, as non-response rates to such items are low and can produce unexpected results. For example, in Cuba 86% of survey respondents reported positive feelings for the United States – in spite six decades of official enmity. And in Sudan, 63% of respondents expressed pro-American feelings – despite long being placed on a U.S. State Department blacklist as a "state sponsor of terrorism." While this does not rule out response bias entirely, it suggests that – on the whole – citizens of authoritarian regimes are more open in sharing feelings about other countries than opinions regarding their own.

Source	Surveys	Countries	Years
Afrobarometer	104	39	2014–21
Arab Barometer	31	12	2018–21
Bendixen and Amandi International	1	1	2015
Centre for Eastern Studies	2	1	2021–22
Central Asia Barometer	13	5	2017–19
Communitas Foundation	1	1	2012
Focus Taiwan	4	1	2018–22
Fondation pour l'Innovation Politique	123	55	2017-21
Gallup USA	32	1	1979–22
Global Times	1	1	2021
Globescan	25	1	2013
Groupe d'étude sur le Congo (Kinshasa)	3	1	2016–22
International Republican Institute	204	59	2011–22
IranPoll	10	1	2014–22
IrelandThinks	1	1	2021
Latana	104	52	2021–22
Latinobarómetro	310	19	1995–21
National Survey of Mongolian Public Opinion	1	1	2016
NORC at the University of Chicago, Survey of Cuba	1	1	2016
Palacky University Olomouc and CEIAS	1	1	2022
Pew Global Attitudes and Trends	485	63	2007–22
Research Center for Contemporary China at Peking University	1	1	2019
RIWI US-China Perception Monitor	1	1	2021
Sinophone Borderlands Europe Survey	13	13	2020
Social Science Research Institute Iceland	1	1	2020
Taloustutkimus (Finland)	12	1	2009–22
USAID South Sudan Survey	1	1	2013
USAID / National Endowment for Democracy	4	4	2018
Yusof Ishak Institute	10	10	2021
Zogby Middle East Public Opinion	18	10	2016-18

Table 1: *Data sources used in this study, showing number of survey observations, countries covered, and years of available data.*

5. The New Structure of Global Public Allegiances

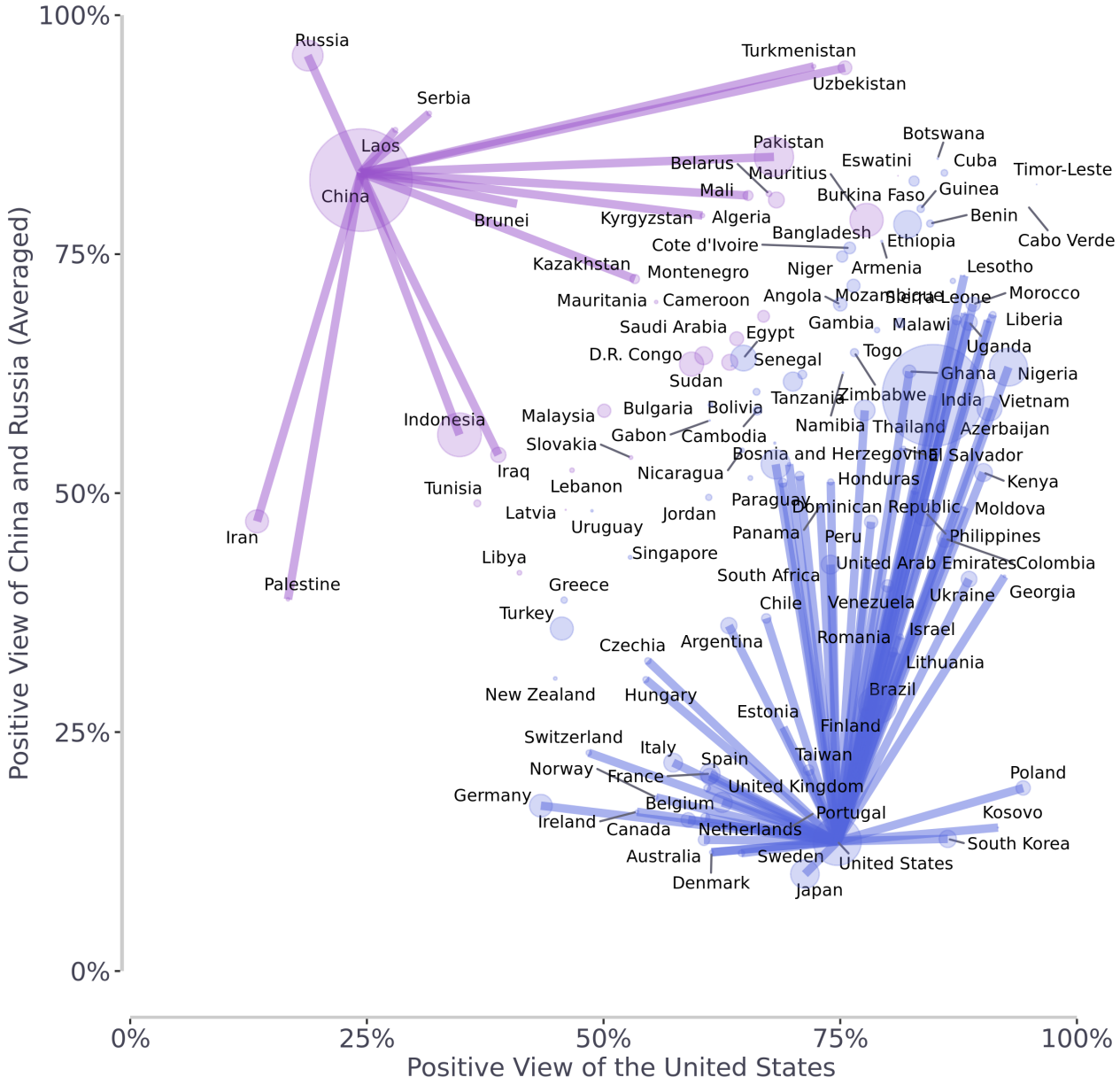


Figure 5: *The structure of global allegiances in 2022. Countries with a more than 15 percentage-point lead towards either i) Russia/China or ii) the United States, are indicated by connecting lines. By comparison, the United States enjoys a much larger number of ties to societies that favour America over authoritarian revisionist powers, though, this may in part be due to suppressed favourability towards Russia in the wake of the Ukraine invasion.*

If the world is now the terrain of a struggle for global influence between America, China and Russia, then where are societies situated across this space? Figure 5, above, provides an answer using the most recent data from 137 countries across the globe. Societies are placed according to two variables: the level of positive sentiment towards the United States, on the horizontal axis, compared to positivity towards Russia and China, on the vertical. Blue connecting lines show countries leaning towards America: these are societies in which the United States has a minimal fifteen percentage-point lead over its authoritarian rivals. Purple lines, meanwhile, show countries with an equivalent leaning, on average, towards Russia and China. By comparison, America's bloc is much larger: 64 countries

in total, compared to just 15 on China and Russia's side. It is also benefits from a larger population, though only because India and its 1.4bn people were narrowly included. Setting aside India as an ambiguous case, the two sides carry equal demographic weight – with 2.5bn people in societies aligned behind America, 2.3bn in societies close to Russia and China, and each bloc accounting for around 30% of current world population.

By economic power, however, the American alliance comes out far ahead. Societies aligned with the United States have a total gross domestic product of $70tn – double the collective $35tn that is accounted for by countries favouring Russia and China.[6] This reveals America's key strength: the ability to project power through allied high-income democracies. America's own economy, at $21tn, is less than the collective GDP within China and Russia's orbit, yet American partners effectively triple its economic clout – and enable the maintenance of non-military tool such as sanctions and blacklists. By contrast, Russia and China are lonely giants, together accounting for almost $30tn of the $35tn economy in their zone.

These groupings are also visible on a map, as in Figure 6 below, which displays the American lead (or lag) in public perception vis-a-vis China. While the "authoritarian bloc" spans a large swathe of the Asian continental landmass, America leads a maritime alliance across the Atlantic and Pacific oceans. China's sphere stretches across land to reach through Russia, Central Asia, Pakistan and Iran, while American sphere extends over water to reach Europe, South America, Australasia and the North Pacific.

Who is Winning the Race for Global Influence?

Finally, we can see how major powers are faring over time with respect to global popularity beyond their borders, using all countries for which we have data over the decade from 2011 to 2022. In order to ensure that trendlines are representative of global public opinion, countries are combined using population weighting, and to prevent sample bias we maintain a constant-country-sample for all years by substituting the most recent available survey observation whenever a current country observation is not available.

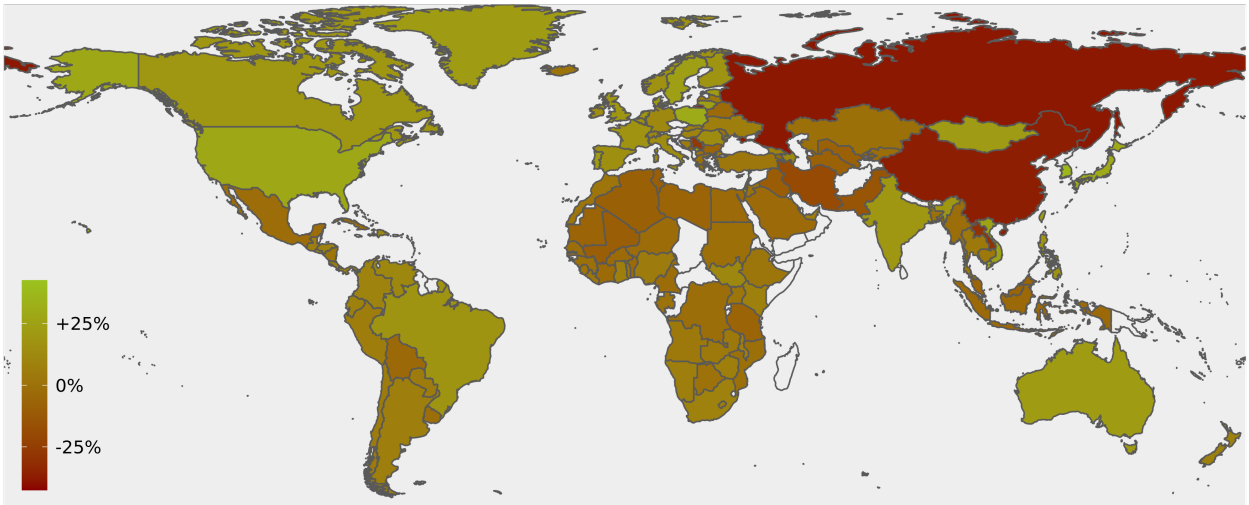
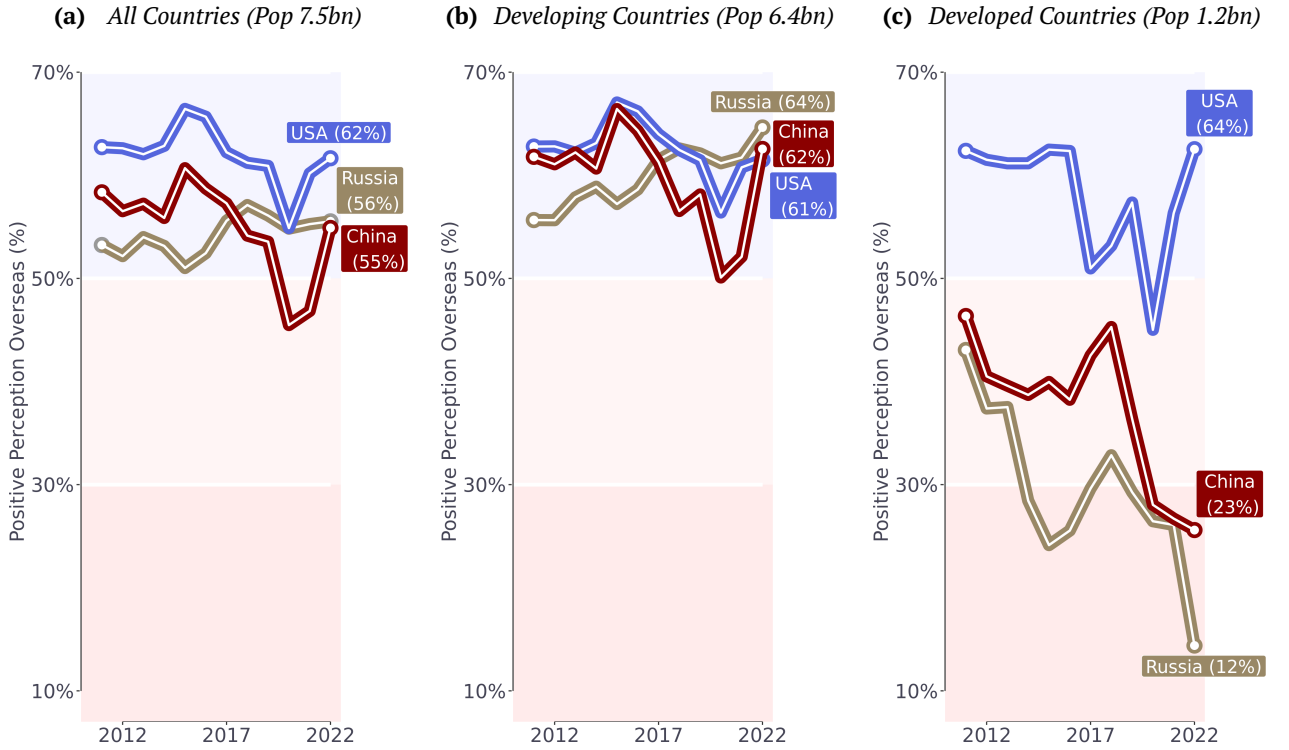


Figure 6: *Public opinion lead (lag) of the United States versus China, using the latest available surveys for each country. While America has a clear lead in public favourability across the western hemisphere, China is viewed more positively in Asia, and also enjoys strong support across much of Africa.*

[6] To prevent currency valuations from distorting estimates of the volume of economic activity, purchasing power parity (PPP) adjusted gross domestic product figures are used.



Developed Countries (PPP GDP per capita > $35,000), by order of population: *United States (only for Russia and China figures), Japan, Turkey, Germany, France, United Kingdom, Italy, South Korea, Spain, Canada, Poland, Saudi Arabia, Australia, Republic of China (Taiwan), Romania, Netherlands, Belgium, Czechia, Greece, Sweden, Portugal, Hungary, Israel, United Arab Emirates, Austria, Switzerland, Denmark, Finland, Slovakia, Norway, New Zealand, Ireland, Kuwait, Lithuania, Latvia, Estonia, Brunei.*

Developing Countries (PPP GDP per capita < $35,000), by order of population: *China (only for United States and Russia figures), India, Indonesia, Pakistan, Brazil, Nigeria, Bangladesh, Russia (only for United States and China figures), Mexico, Ethiopia, Philippines, Egypt, Vietnam, D.R. Congo, Iran, Thailand, Tanzania, South Africa, Kenya, Myanmar, Colombia, Uganda, Argentina, Sudan, Algeria, Ukraine, Iraq, Afghanistan, Morocco, Uzbekistan, Angola, Peru, Malaysia, Mozambique, Ghana, Venezuela, Cameroon, Cote d'Ivoire, Niger, Burkina Faso, Mali, Malawi, Chile, Kazakhstan, Zambia, Ecuador, Senegal, Guatemala, Cambodia, Zimbabwe, Guinea, Benin, Tunisia, Bolivia, South Sudan, Cuba, Dominican Republic, Jordan, Azerbaijan, Honduras, Belarus, Togo, Sierra Leone, Laos, Paraguay, Libya, Lebanon, Bulgaria, Nicaragua, Kyrgyzstan, El Salvador, Serbia, Turkmenistan, Liberia, Costa Rica, Palestinian Territories, Mauritania, Panama, Georgia, Uruguay, Mongolia, Armenia, Namibia, Moldova, Gambia, Botswana, Gabon, Lesotho, Timor-Leste, Mauritius, Eswatini, Cabo Verde.*

Figure 7: *Trends in global public opinion towards Russia, China and the United States over the course of the past decade. Globally, the United States has retained its popularity lead over China and Russia. However, this masks a major divergence between developed and developing countries. In fellow western countries, America's relative favourability has soared to newfound highs, though Russia and China have overtaken in the Global South. Each series aggregated using population weights; "self-responses" excluded (e.g. China excluded from measure of global attitudes to China).*

These trends over time are shown in Figure 7. Beyond their borders, both China and the United States have seen minor approval declines. Surprisingly, Russia has held on to a two percentage-point bump in global popularity in the last decade – though, only due to a jump in Chinese support, without which the country would have recorded an eight percentage-point plunge this year.

Global averages, however, hide regional divergence. In developed democracies, opinions of Russia and China have cratered to historic lows (c). Positive sentiment towards China has fallen from 47% to 23%, and towards Russia from 45% to 12%. For context, similar polling numbers were only recorded in the United States during the first decade of the Cold War.[7] Yet in developing countries, Russia and China remain narrowly ahead (b).

[7] Rescaled for equivalence, Russia averaged just 6% approval among Americans polled in the 1950s, rising to 33% after the 1960s. See Tom W. Smith (1983). "The Polls: American Attitudes Toward the Soviet Union and Communism." *The Public Opinion Quarterly*, 47(2), 277–292.

How Rising Authoritarian Powers Galvanized the World

With Us or Against Us?

A constant refrain of foreign policy realists is that we avoid making oversimplified views of world into "blocs," "cultures" or "civilisations." Instead, they urge us to perceive those small differences between countries, which might present future diplomatic opportunities. For example not every country close to China feels similarly as regards Russia. Their enhanced partnership, therefore, might have alienated some of China's former partners – especially on the other side of Russia's own borders in the Baltics, Caucasus and Bessarabia.

Yet by and large, countries with a positive view of China, tend to feel positively about Russia, and vice-versa (Figure 8). Moreover, not only has the correlation between pro-Chinese and pro-Russian attitudes risen during the past decade, but both have become *negatively* associated with feelings towards the world's foremost democracy – the United States (Figure 9).

Does this invalidate the realist argument for tact and nuance? Perhaps not, if America's tendency to divide the world into friends and enemies – the "forces of democracy against autocracy" – has now become self-fulfilling. Perceiving a threat, excluded states and regimes have collaborated defensively in mutual support, producing this very opposition. In the meantime, efforts to export democracy by force are likely to have backfired by aiding illiberal regimes to win partners in the Global South, where many countries carry the memory of western colonialism.

Yet whatever the role of western policy until now, it is clearly now accompanied by another factor – the threat that authoritarian revisionist powers pose to neighbouring democracies, and their corresponding unification behind the United States.

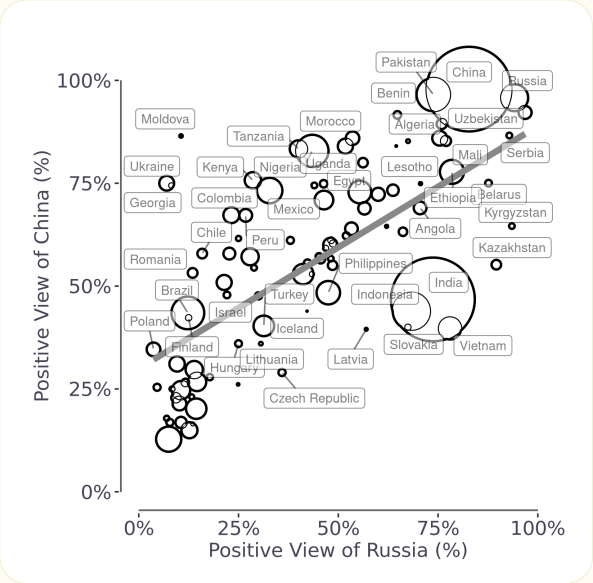


Figure 8: *Across the world, there is now a high correlation between how societies view Russia and how they view China. This correlation has increased over time, and is now higher than ever before.*

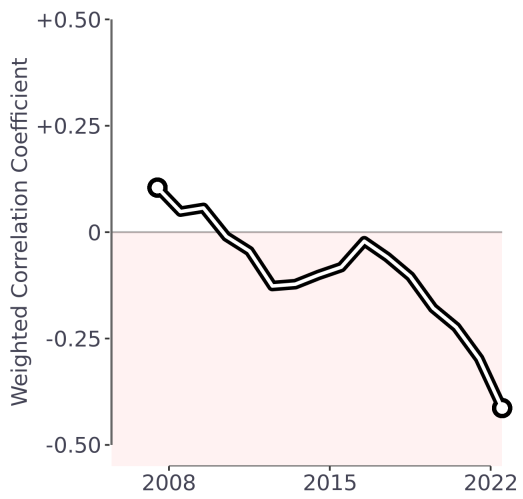


Figure 9: *Meanwhile, this is accompanied by a growing inverse relationship between whether countries are positive towards Russia and China, and whether they are positive towards the United States.*

6. Visualising a Decade of Rising Geopolitical Polarisation

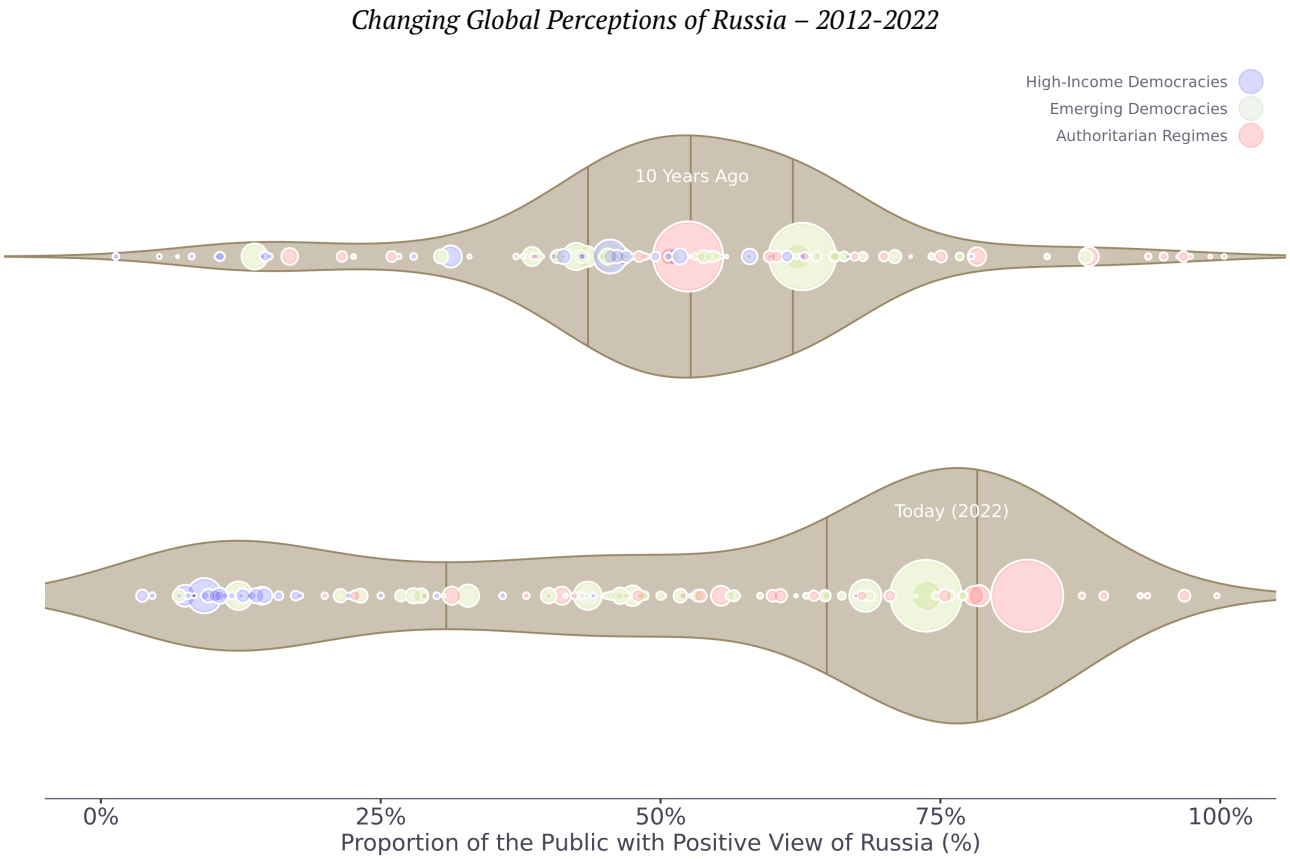


Figure 10: *The spectrum of global public opinion towards Russia, from 2012 (top) to 2022 (bottom). Over the course of the past decade, Russia's reputation improved across countries of the Global South, notably in populous nations such as India, China, and Indonesia. At the same time, almost all high-income democracies now view Russia negatively – and to an exceptional degree. Data points for Russia itself are excluded from display.*

Another way of examining the rise in geopolitical polarisation is to compare the distribution of global opinion today to that of one decade ago. We do so in this section, by charting the feelings of all societies towards each of the major powers on a scale at two separate points in time.

Russia

Starting with Russia, it is perhaps no surprise to discover that the country has polarised global public opinion. This can be seen from Figure 10, which compares the distribution of global public sentiment towards Russia a decade ago in 2012 (upper chart) with its distribution today in 2022 (lower chart). Ten years ago, most societies felt neutral regarding Russia. Extreme hostility was limited to Georgia and Kosovo, while enthusiastic support was confined to countries with deep historical and cultural ties, such as Serbia, Ethiopia, or Greece. Today, by contrast, few countries remain neutral. Russia's reputation has plummeted across almost all of the world's developed democracies, as seen from the large cluster of blue points to the left of the lower figure. Yet among developing countries, opinions of Russia have improved on average – with gains in populous India, China and Indonesia serving to anchor its approval in the Global South.

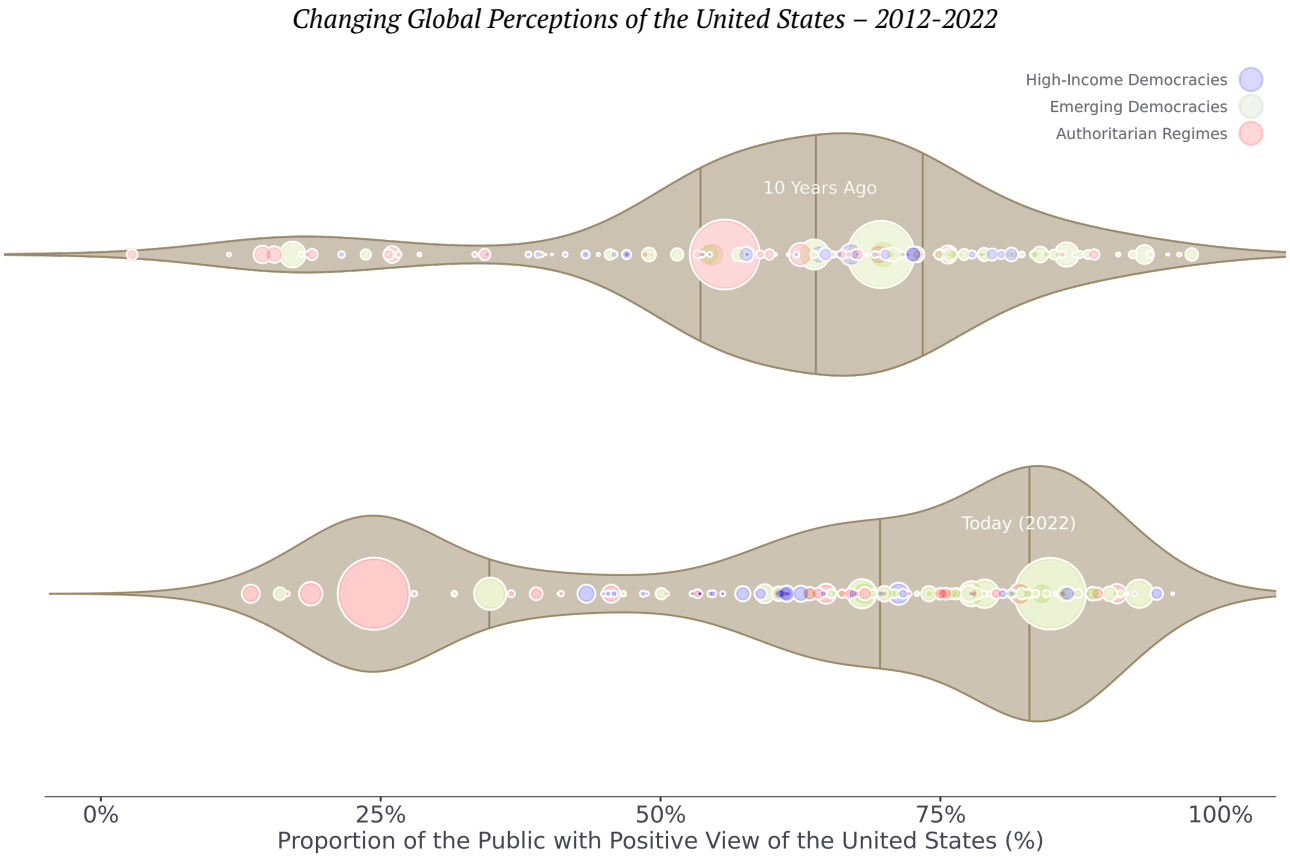


Figure 11: *The spectrum of global public opinion towards the United States, from 2012 (top) to 2022 (bottom). A decade ago, the weight of global public opinion was overwhelmingly positive towards the United States, barring a notable exception among the countries of the Middle East. Today, by contrast, attitudes have polarised – with western nations more than ever behind the U.S., yet a much longer tail of countries where public opinion is ambivalent or even hostile to the United States, led by Iran, China and Russia. In spite of this, however, the average perception of the U.S. in the world as a whole has become more positive over time. Data points for the United States itself are excluded from display.*

The United States

Turning to the United States, we can see a similar polarisation of global public opinion (Figure 11). A decade ago, the large majority of societies were "neutral-to-positive" (50% to 70% favourable) regarding America. Negative attitudes remained concentrated in the Middle East, while enthusiastic support was confined to sub-Saharan Africa.[8]

Today, by contrast, the world has divided. A staunchly pro-American consensus has formed among U.S. security partners in Eastern European and Asia, with overwhelming majorities favourable in Poland (94%), Ukraine (89%), or South Korea (86%). Yet pro-American views have deteriorated steadily among the countries the United States considers as key geopolitical rivals. In China, the onset of trade wars during the Trump administration set in motion a decline from around half to a quarter of respondents with positive views of America, a figure that has not recovered since the election of Joe Biden in 2020. Similarly, whereas a decade ago a majority of Russians and almost one in three Iranians viewed America positively, today these figures are just 19% and 13%, respectively.

[8] This likely also reflected an "Obama effect," as perceptions of America were positive across the continent during his presidency. Not least of all, in his father's homeland of Kenya, where 9 in 10 (87%) viewed America positively at the time.

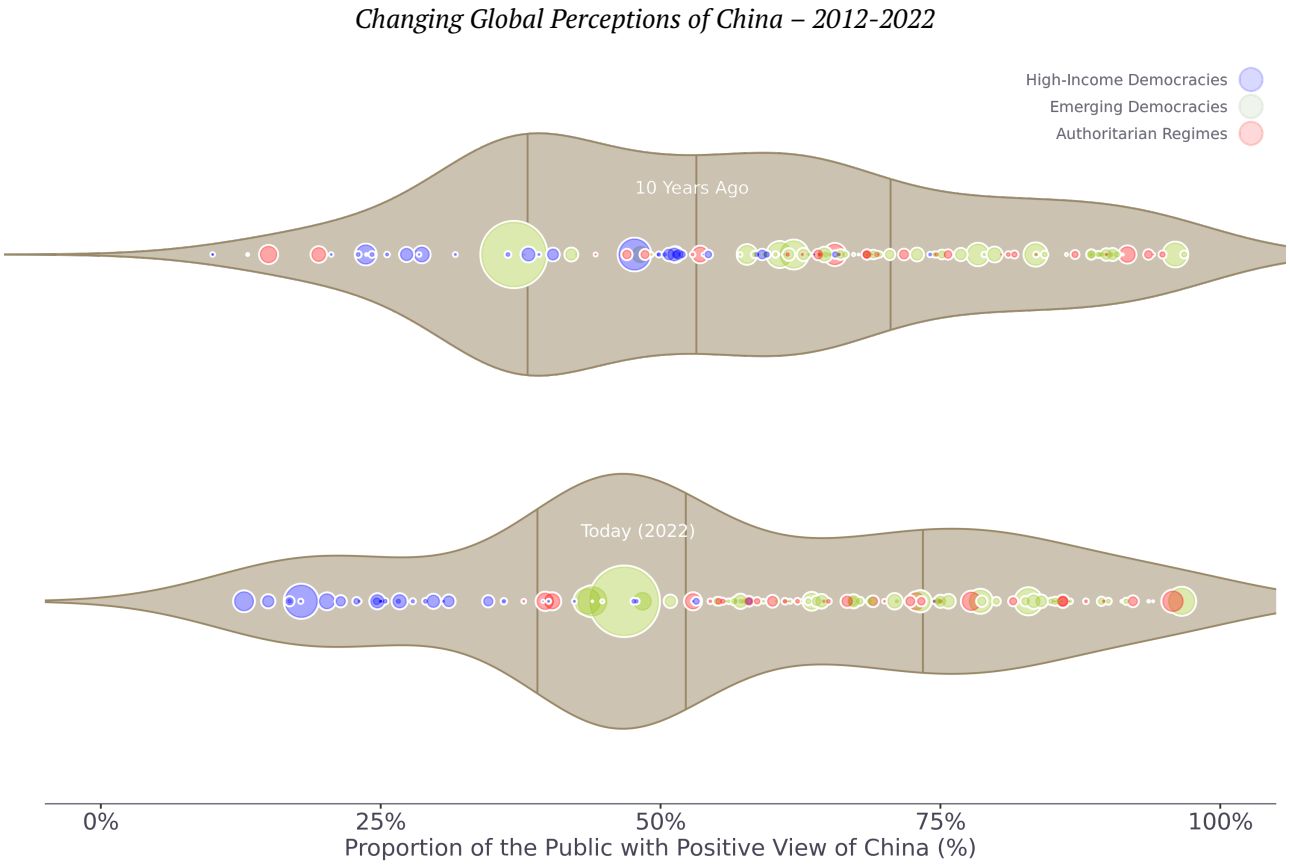


Figure 12: *The spectrum of global public opinion towards China, from 2012 (top) to 2022 (bottom). Quartiles shown by vertical lines; data points for China itself excluded from display. Over the past decade, there has been little change in the overall spectrum of global public opinion towards China. However, there has been a very clear sorting by political system - with the peoples of high-income democracies now all holding negative views of China, while countries in the Global South – in particular, those under autocratic rule – became more positive.*

China

Finally, China appears to be the one power eliciting a fairly stable balance of global viewpoints, with little change in the distribution of opinions since 2012 (Figure 12). However, this masks a very subtle sorting of countries by political system. Ten years ago, positive majorities were still to be found in western democracies such as Australia, Greece, or Canada, even if a negative consensus had already formed in countries such as Japan and the United States. Today, by contrast, China is disliked by a majority across almost all high-income democracies. Meanwhile, however, public attitudes towards China have grown steadily *more* favourable within non-democratic regimes. Majorities in Iran, Russia, and the Arab Gulf now express their support for China – with even 40% of Vietnamese voicing a positive view of their northern neighbour, up from just 18% a decade ago.

This sorting by political regime is consistent with recent research by Yu Xie and Yongai Jin, which finds that citizens in less developed and less democratic societies hold more positive attitudes regarding China, together with people in countries which receive more Chinese foreign direct investment.[9] Thus while the median global opinion of China does not appear to have changed, China has substituted for its loss of reputation in the West by raising its profile across developing countries in the Global South.

[9] Yu Xie & Yongai Jin (2022). "Global Attitudes toward China: Trends and Correlates." *Journal of Contemporary China*, 31(133), 1–16. DOI: 10.1080/10670564.2021.1926088

7. Regional Divergence Over Time

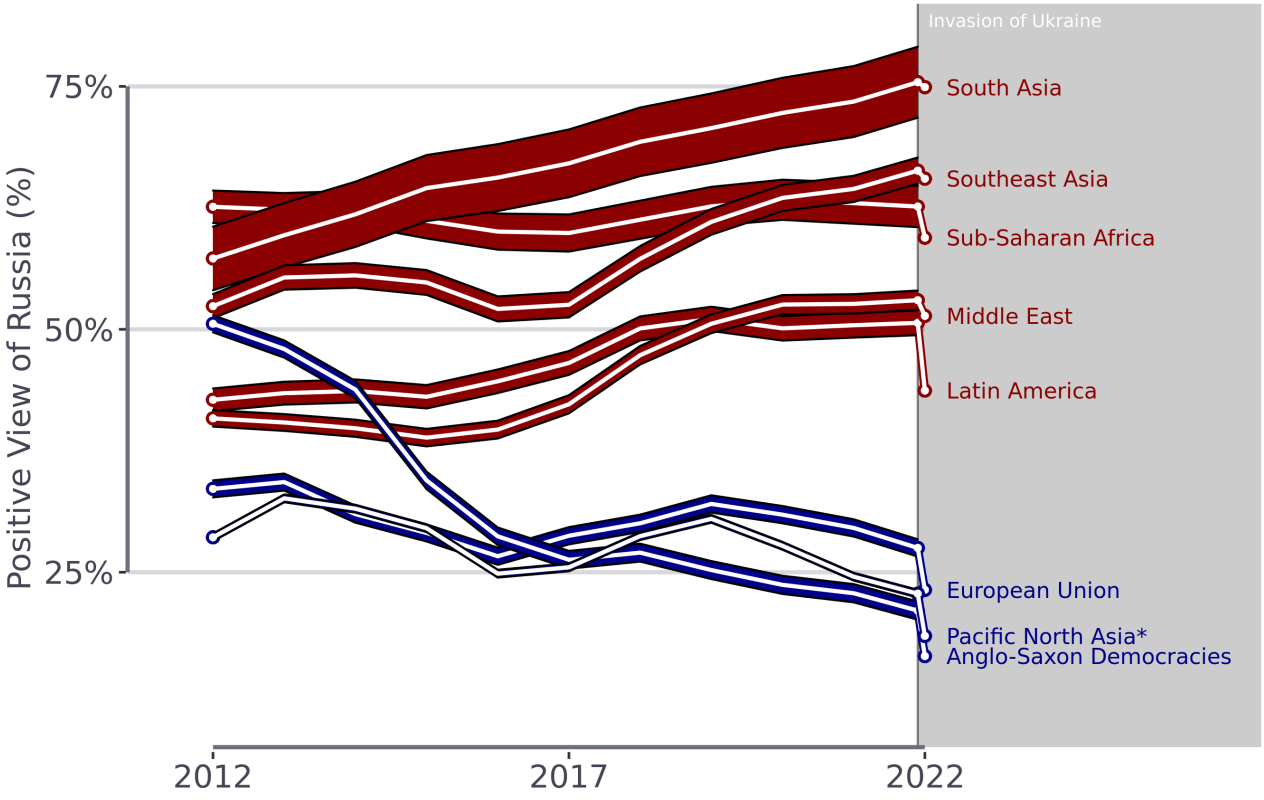
Next, we turn to look at how each world region has changed in its views towards Russia, China and the United States in the last decade – making clear a widespread divergence of developed and developing zones.

Russia

Russia offers perhaps the clearest case where opinions in the developed and developing worlds have separated (Figure 13). Though it is difficult to remember, until 2012 a narrow majority of Americans thought positively of Russia – as did most citizens of European countries such as Great Britain or France. Yet following the 2014 annexation of Crimea and downing of MH-17, western views of Russia began to deteriorate, and have never since recovered.

By contrast, until the 2022 invasion of Ukraine, most developing regions were becoming more "Russia favourable." Large increases were seen in South Asia (57% to 76%), Southeast Asia (52% to 67%), and Latin America (43% to 53%), while even in the Middle East positive sentiment rose from 41% to 53% – in spite of Russia's post-2015 intervention to support Syria's widely reviled leader, Bashar al-Assad.[10] Inevitably, the war in Ukraine has now prompted a major reassessment in much of Africa and Latin America – yet less so in Asia, perhaps because the reporting of events was mediated via pre-existing Russian sympathies.

Changing Regional Perceptions of Russia, 2012-22



** Pacific North Asia refers to Japan, South Korea, and the Republic of China (Taiwan).*

Figure 13: *Over the past decade, positive sentiment towards Russia has turned downward among high income democracies across the world – including in Europe, the Americas, and the Asia-Pacific region. Yet at the same time, Russia's reputation has improved across many parts of the Global South – in particular in South Asia, Southeast Asia and the Middle East.*

[10] MaryClare Roche (2022). "Citizens Lukewarm on Leaders' Cold War." Arab Barometer Blog.

Why is Russia Still Popular Across Many Parts of Africa?

Examining Russia's "Great Return" to the African Subcontinent

During the Cold War, post-colonial Africa was an important front in the geopolitical contest for international influence. A number of countries – notably Angola, Ethiopia, and Algeria – considered the Soviet Union their primary ally. Beyond this, the Communist bloc provided diplomatic support for key post-colonial movements, including Patrice Lumumba's *Mouvement National* in Congo, and Nelson Mandela's *African National Congress* in South Africa.

Yet with the collapse of the Soviet Union in 1991, Russia's global ambitions ceased. Regimes it once supported faltered; even Mandela's post-apartheid government pursued renewed ties with the west. Russia had become a marginal actor, with neither the means nor incentive to restore its former regional influence.

Largely unnoticed, however, is how in the past decade Putin has found a new niche in Africa's regional politics. Some have even called it a Russian "Great Return" to Africa.[11] Driven at first by Russia's search for new allies following the annexation of Crimea, African governments are now calling in the favour. Notably, countries across the Sahel which have relied on Russian mercenaries to assist counterinsurgency operations, and Russian armaments to re-equip their armed forces.[12,13]

As a result, Russia continues to maintain popularity across many parts of Africa – and not least of all, Sahel-adjacent countries in Francophone West Africa, and their Arabic-speaking neighbours to the north (Figure 14, below).

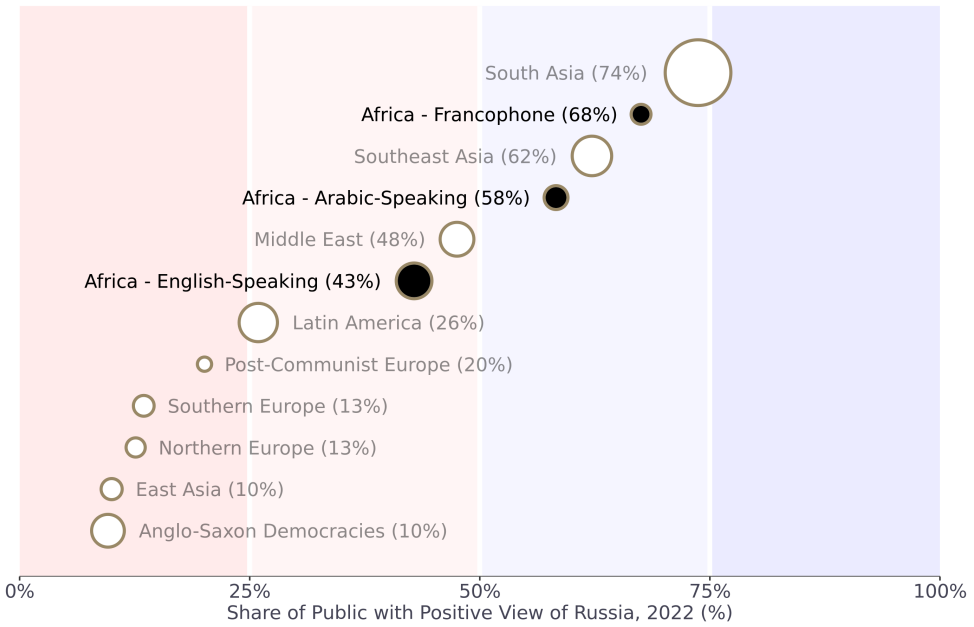
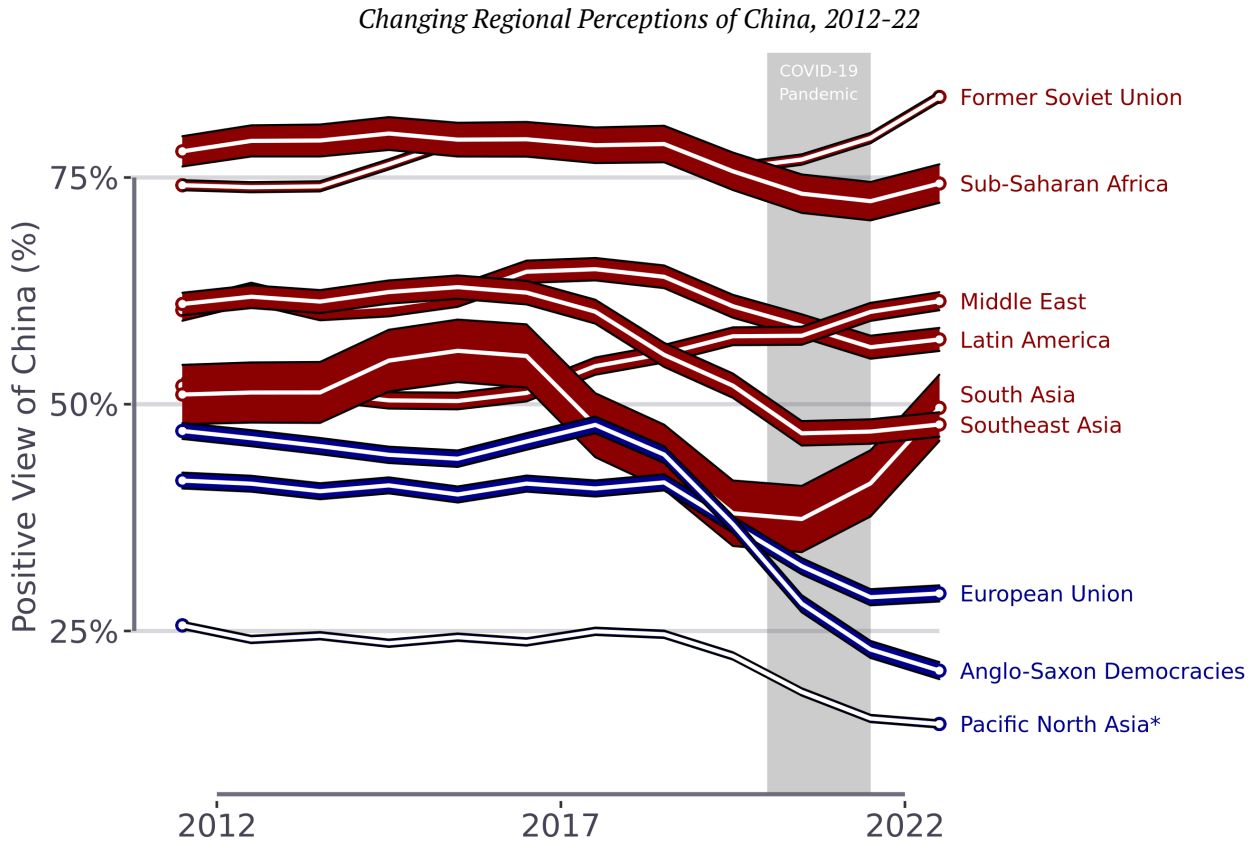


Figure 14: *Russia still remains popular across much of Africa today, especially in countries around the Sahel region – such as Francophone West Africa, and the Arabic-speaking countries to its north.*

[11] Arnaud Kalika (2019). *Russia's 'Great Return' to Africa?* Paris, France: Institut Français des Relations Internationales.
[12] Federica Saini Fasanotti (2022). *Russia's Wagner Group in Africa: Influence, Commercial Concessions, Rights Violations, and Counterinsurgency Failure*. Brookings Institute.
[13] Pieter D. Wezeman, Alexandra Kuimova & Siemon T. Wezeman (2021). *Trends in International Arms Transfers, 2020*. Stockholm International Peace Institute.



** Pacific North Asia refers to Japan, South Korea, and the Republic of China (Taiwan).*

Figure 15: *Over the past decade, China's image has remained broadly favourable across the Global South, with the exception of a brief dip during the global coronavirus pandemic. However, attitudes towards mainland China have deteriorated significantly across the world's high-income democracies, whether in Europe, North America, or the Asia-Pacific region, and this has resulted in a growing global divide. Thickness of regional trendlines are relative to total population.*

China

When we look at regional opinion trends regarding China, we find a similar global divergence. China has dramatically expanded its economic and political power in the last decades, becoming an substantive counterbalance to western influence in Africa and Asia. This can be seen from the high and stable popularity that China enjoys across the African subcontinent, together with its growing appeal in the Middle East and Former Soviet Union (Figure 15). Yet while mainland China continues to exert soft power across continental Eurasia, the country has witnessed a dramatic decline in public support in Western Europe and North America, as well as nearby South Korea and Japan.

As a result, a number of studies conducted in recent years have argued that China's global popularity may be in structural decline.[14] The rise of a more assertive China entails greater security concerns for others, and is already leading to efforts at regional counterbalancing via potential counterweights such as India.

However, there are two reasons why these findings merit a note of caution. The first is a tendency to over-rely upon polls conducted in western democracies and partners, relative to more populous countries in Africa, the Middle East, and South and Southeast Asia. Given that western societies are souring in their opinion of China, this can produce a

[14] Laura Silver, Kat Devlin & Christine Huang (2020). "Unfavorable Views of China Reach Historic Highs in Many Countries." Pew Research Center.

misleading estimate of the country's shifting global influence over time. Second, surveys conducted during the global coronavirus pandemic were affected by a temporary global spike in anti-Chinese attitudes.[15] More recent data, by contrast, suggests that – in the developing world at least – positive opinions of China already surpass pre-pandemic levels. In 2019, 58% of individuals living in developing countries outside of China had a favourable view of the country. During the first year of the pandemic, that number fell to 50%, but has since recovered by thirteen percentage-points, to 63% – slightly higher than the level one decade ago.

Mapping Global Influence

The result is a global distribution of attitudes to China in which western countries – that is, western Europe, North America and Australasia – appear the outliers, while the rest of the world remains broadly receptive of Chinese influence (Figure 16).

As we explore further in the next chapter, the pattern of global pro-Chinese sentiment is also strikingly consistent with patterns of Chinese trade and investment – above all participation in China's flagship Belt and Road Initiative (BRI), which covers a broad swathe of countries connecting China to Central Asia, the Middle East, and sub-Saharan Africa. Africa in particular has long been a priority for Chinese overseas development partnership. In total, Chinese financiers signed loan commitments worth a total of $160bn with African governments and state-owned enterprises between 2000 and 2020.[16] Estimates by Deloitte suggest that by 2020 China was responsible for 31% of all infrastructure projects in the region, including ports, roads, train lines and utilities.[17] These investments are highly visible, and may contribute to the overwhelming pro-Chinese majority to be found in countries such as Mali (90% positive), Niger (88% positive), and Sierra Leone (87%) positive.

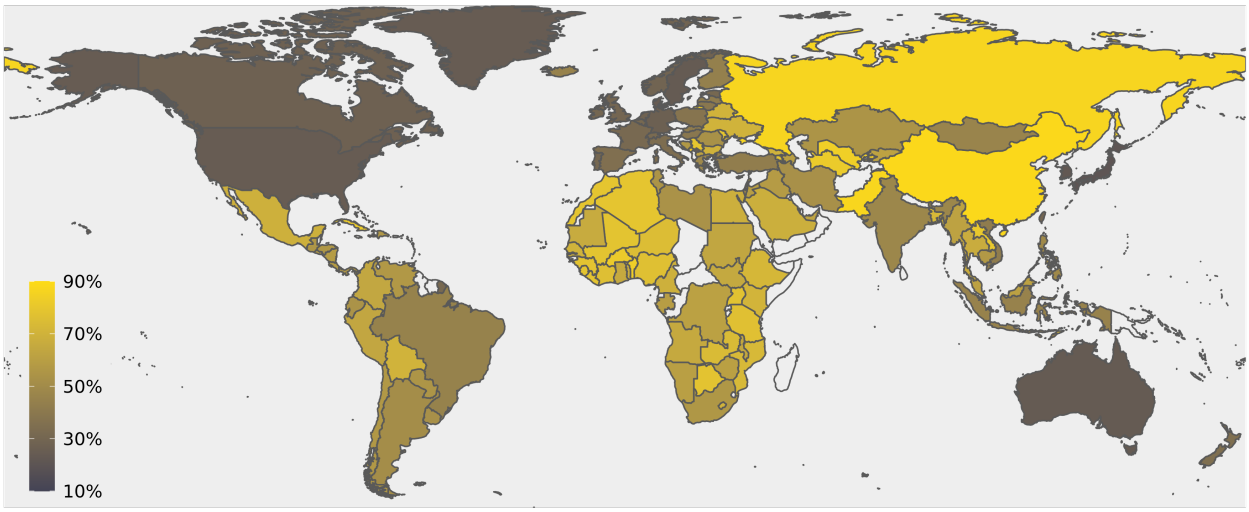
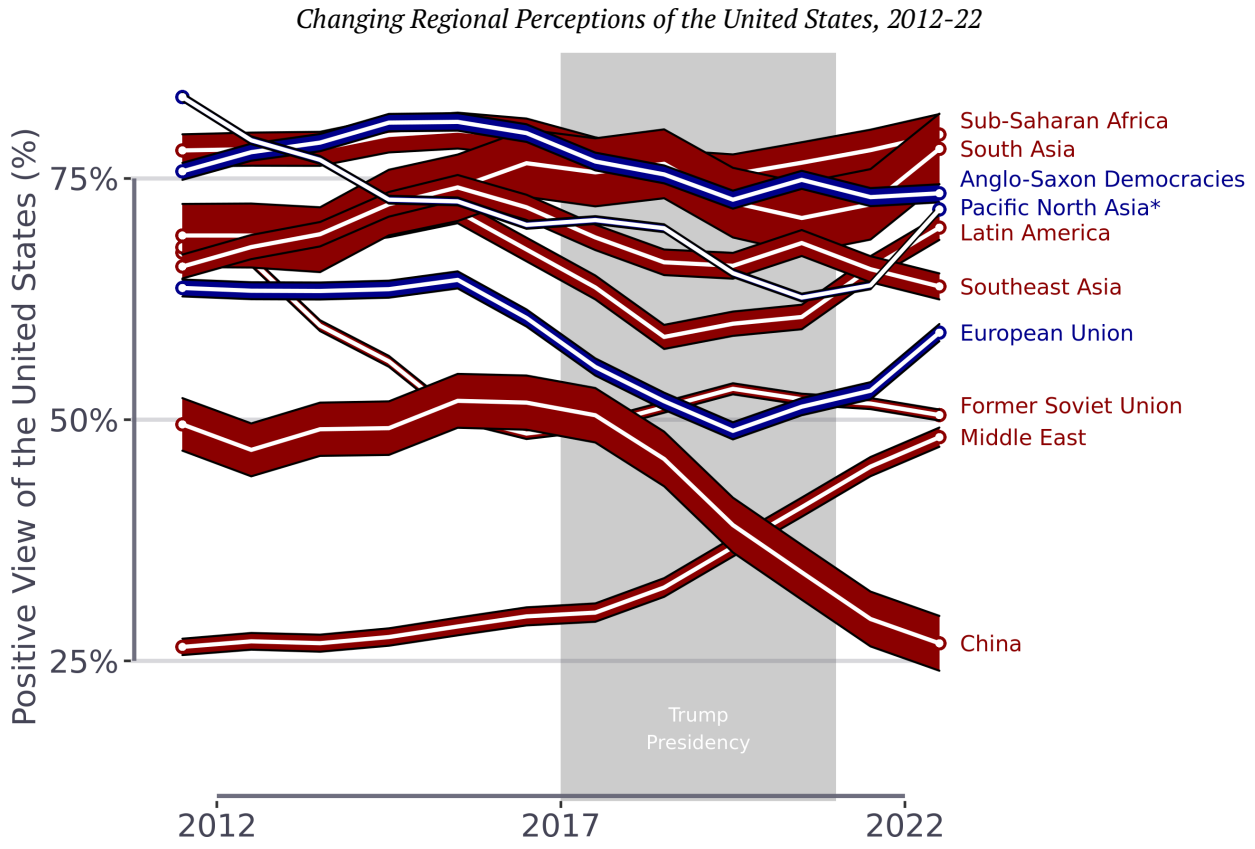


Figure 16: *Positive perception of China, 2022 (%). Favourable views of China have fallen dramatically in western countries, though China has retained and grown in popularity across the Global South, in particular among members of the Belt and Road Initiative.*

[15] Tyler T. Reny & Matt A. Barreto (2020). "Xenophobia in the Time of Pandemic: Othering, Anti-Asian Attitudes, and COVID-19." *Politics, Groups and Identities,* 10(2), 209–232. DOI:10.1080/21565503.2020.1769693

[16] Boston University Global Development Policy Center (2022). *Chinese Loans to Africa Database*. Accessed September 2022.

[17] *The Economist*, (2022, February 1). "How Chinese Firms have Dominated African Infrastructure."



** Pacific North Asia refers to Japan, South Korea, and the Republic of China (Taiwan).*

Figure 17: *In spite of a moderate decline during the Presidency of Donald J. Trump, global perceptions of the United States have become more favourable over the course of the past decade. America also retains a high degree of popularity across the Global South, and even in the Middle East perceptions of the United States have begun to recover since they reached a low-point during the War on Terror. Thickness of regional trendlines are relative to total population.*

The United States

Finally, the United States enjoys high levels of support across most regions of the world (Figure 17). This is especially the case in Latin America, sub-Saharan Africa and the countries of Central-Eastern Europe. By contrast, negative opinions of America have generally been confined to the Middle East. However, since the trade wars initiated by former president Donald J. Trump, they are also now prevalent across mainland China – where we estimate the proportion of the public holding a negative opinion of America has risen from less than half, to more than three-quarters of all people.[18]

More so than other countries, international opinions of the United States are considerably affected by the beliefs and personality of the incumbent president. A decade ago, for example, Barack Obama had just been re-elected for a second term. Assisted by his global popularity, views of America were from the outset more favourable during his time in office, and this must be considered when comparing trends over time.[19] By contrast, international evaluations of his successor, Donald J. Trump, were less sym-

[18] Note that the assessment of public opinion in China is one area that benefits from our data harmonisation approach, as polling on Chinese foreign policy attitudes has become more scarce since the onset of the pandemic. For this report we were able to maintain a tracker of Chinese opinion by combining longstanding polls (e.g. Pew) a wide range of individual survey projects conducted in mainland China since 2016, including three fielded during the past 12 months.

[19] Pew Research Center (2009). *Confidence in Obama Lifts U.S. Image Around the World.*

pathetic. This depressed overall sentiment towards the United States in the years from 2017 to 2021, especially among America's traditional allies in Europe, Asia, and Australasia.[20] In our aggregated global series we estimate that worldwide positive opinion of the United States fell from 66% in 2016, the year before Trump was inaugurated president, to just 55% in 2020, the year of his final period in office. By contrast, since the start of Joe Biden's presidency in January of 2021 America's global popularity has recovered by 7 percentage points – and now stands at 62% favourable, similar to the level of a decade ago. Since the change of administration the largest increases in American support have occurred in Japan (+27%-pts), the European Union (+18%-pts), and Latin America (+13%-pts), with less change observed in other developing regions or in China.

Mapping Global Influence

Viewed on a map, America enjoys broad support across the western hemisphere. In this respect, America's network of allies is truly "western," in the strict geographic sense of the term (Figure 18). In demarcating these spheres, we can trace an imaginary line down from Finland in the north, down Russia's border with Eastern Europe, to Israel in the Eastern Mediterranean, and finally down the coast of eastern and then southern Africa. To the east of this line, we find the societies where public attitudes towards the United States are the most tepid. This includes not only Russia (81% negative), Iran (87% negative), and China (76% negative), but also several of their regional neighbours – including Iraq (61% negative), Laos (72% negative) or Afghanistan (84% negative).

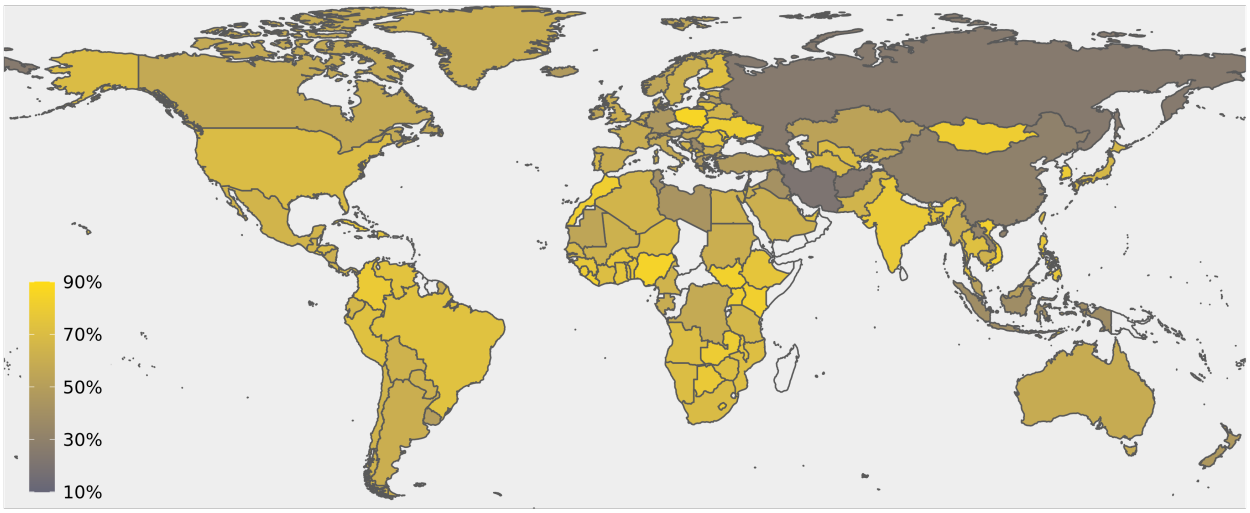


Figure 18: *Global map showing percentage of the public with a positive opinion of the United States, 2022 (or most recent observation). Not only have global attitudes become more polarised with respect to Russia and China, but also with respect to America. The U.S. is perceived positively across most of the world, especially among the peoples of Latin America, sub-Saharan Africa and Central-Eastern Europe, yet hostility to the United States is notable among the "Eurasian triad" of Iran, Russia and China. In spite of improvement since the peak years of the global "war on terror," it still remains elevated in the Islamic world, including in Indonesia, the Arab Middle East and parts of North Africa.*

[20] Richard Wike, Bruce Stokes, Jacob Poushter & Janell Fetterolf (2017). *US Image Suffers as Publics Around the World Question Trump's Leadership*. Pew Research Center.

The Latin America Puzzle

Why are Latin Americans Siding with the West?

For much of its history, Latin America has oscillated between allegiance towards and defiance of its north American neighbour – which, for its own part, has claimed the region its exclusive sphere of influence ever since President James Monroe did so in 1823. During the Cold War, military juntas were staunchly aligned to the United States, though since the return to democracy, new leaders have sought to balance the interests of competing powers. In particular the "pink tide" of the early 2000s seemed to portend a new distancing of the region from American influence, as left-wing politicians elected to power across Latin America expressed a desire to build better ties with China, Cuba, and other developing countries.[21]

In reality, however, the opposite has occurred. Since the turn of the new century, the loyalties of ordinary Latin American citizens have moved closer and closer towards America – and further and further from non-western rivals China and Russia (Figure 26). In 2002 the average person in Latin America preferred these countries over America by a seven percentage-point margin. Since then, however, the United States has pulled ahead – now enjoying a 24 percentage-point popularity advantage.

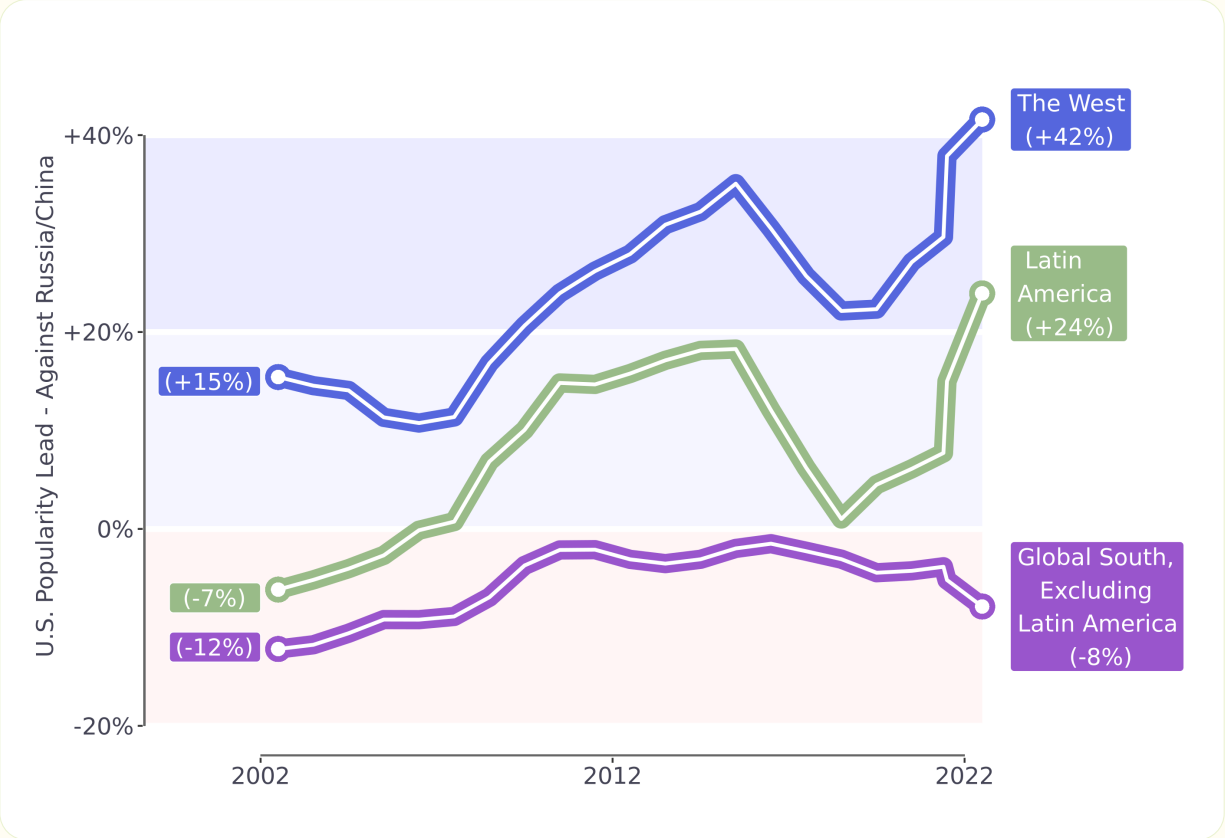


Figure 19: *While much of the Global South remains neutral between the United States and China or Russia, Latin America stands out as the major exception – with relative positive feelings towards the region's northern neighbour reaching record highs. Population-weighted trendlines for all regional groups.*

[21] Miguel Carreras (2017). "Public Attitudes Toward an Emerging China in Latin America." *Issues & Studies*, 53(1). DOI: 10.1142/S1013251117400045.

8. Why is the World Dividing in Two?

What has changed over the course of the last decade to prompt such a realignment? The simplest theory is that rising powers naturally produce a new power divide. Countries are forced to choose external partners to protect their interests; in a world of rival giants, they must opt for one of two potential patrons. And yet, this explanation tells us little about *why* countries choose one side or the other. Is it no more than a simple economic calculus? Or are societies drawn together by other factors, such as shared values, institutions, culture or history? In this section, we provide an initial answer to these questions, by looking at some of the factors which might explain why countries have divided as they have.

Is It A New Cold War?

In some respects, the division of the world into two opposing blocs – a "Eurasian" alliance of middle-income powers led by Russia and China, and a "maritime" alliance of democracies led by the United States – is a reversion to a familiar Cold War pattern. After all, the defining feature of the Cold War division was based upon two competing political ideologies – authoritarian socialism, on the one hand, and democratic capitalism on the other.

This is also suggested by Figure 20, which shows that democratically-governed societies hold less positive views of Russia and China, whereas less democratically-governed societies are more favourable. This association did not exist a decade ago, yet is quite clear today. On average, three-quarters (75%) of all the people who live in the world's liberal democracies now hold a negative view of China, and almost 9 in 10 (87%) have a negative view of Russia. By contrast, in the combined rest of the world, only around one-third share the same sentiment – with just 30% negative regarding China, and 34% holding a negative opinion of Russia.

However, what matters may not be so much the presence of democratic institutions, but

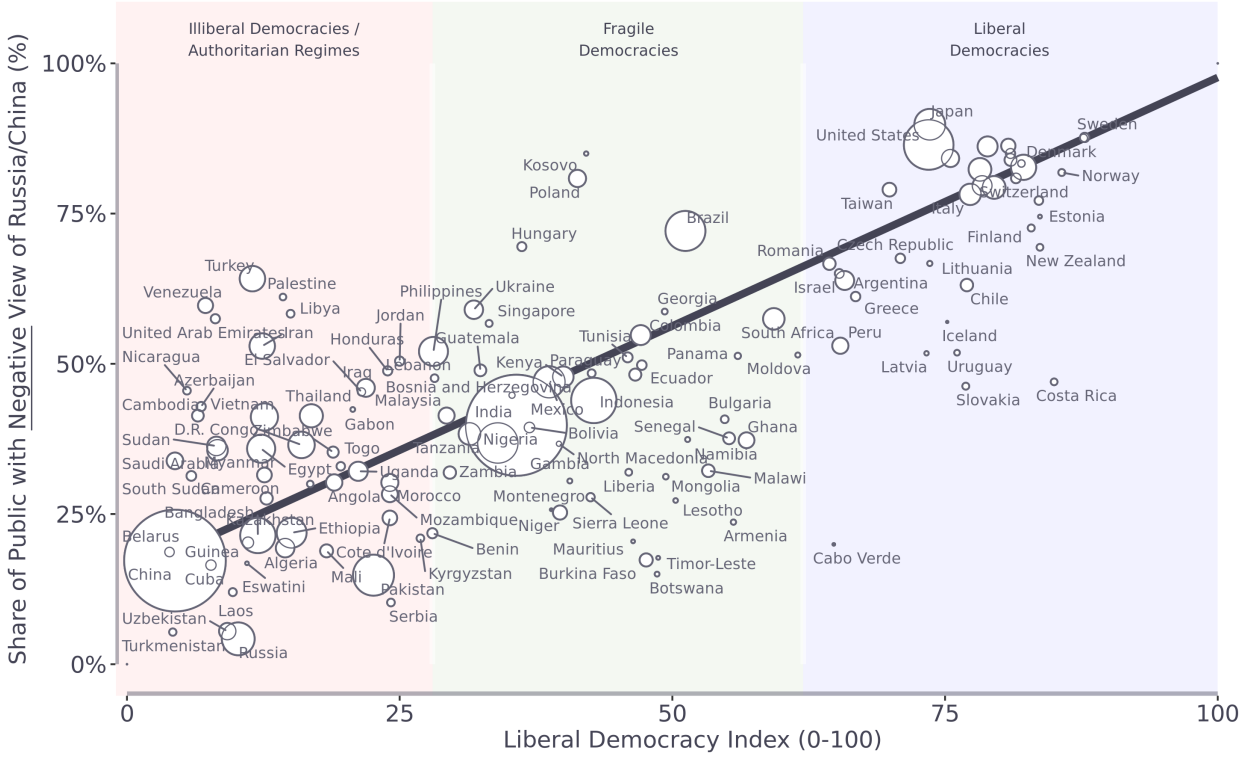


Figure 20: *A new Cold War? Index of liberal democracy (V-Dem), rescaled from 0-100, and average public views towards Russia and China (percentages "unfavourable"). Across the world, there is a clear association between the degree of liberal democracy in a country, and how its public feels towards Russia and China.*

rather, whether they are valued and appreciated by citizens. If so, attitudes towards countries such as Russia or the United States might take into account their potential to assist – or damage – the health of their democracy. For a closer look at Figure 20 reveals a number of electoral democracies, such as Indonesia, India or Nigeria, in which the public remains sympathetic to Russian or Chinese influence, in spite of a difference in political regime. Thus it is not simply whether democratic institutions *exist* that counts – but rather, the degree to which they are seen as functional and legitimate.

This interpretation is suggested by Figure 21, which shows the association between public levels of *dissatisfaction* with democratic performance, and their receptivity towards Russia and China. In short, societies appear more open to authoritarian influence when their democratic institutions are perceived as underperforming. In such cases, democracies lack what political scientists call "performance legitimacy" – the ability to earn public respect by delivering economic growth, better public services, or rule of law.[22]

Considering the ambivalent position of many developing democracies in global politics today, this bears consideration. While a large number of countries transitioned to free and fair elections in the 1980s and 1990s, many continue to struggle with problems of corruption, violence, and political instability. Meanwhile, comparatively few have converged upon western lifestyles or living standards. The relative appeal of a country like China vis-a-vis the United States may involve more than American attractiveness as an ally – but also the attractiveness of its political model.[23]

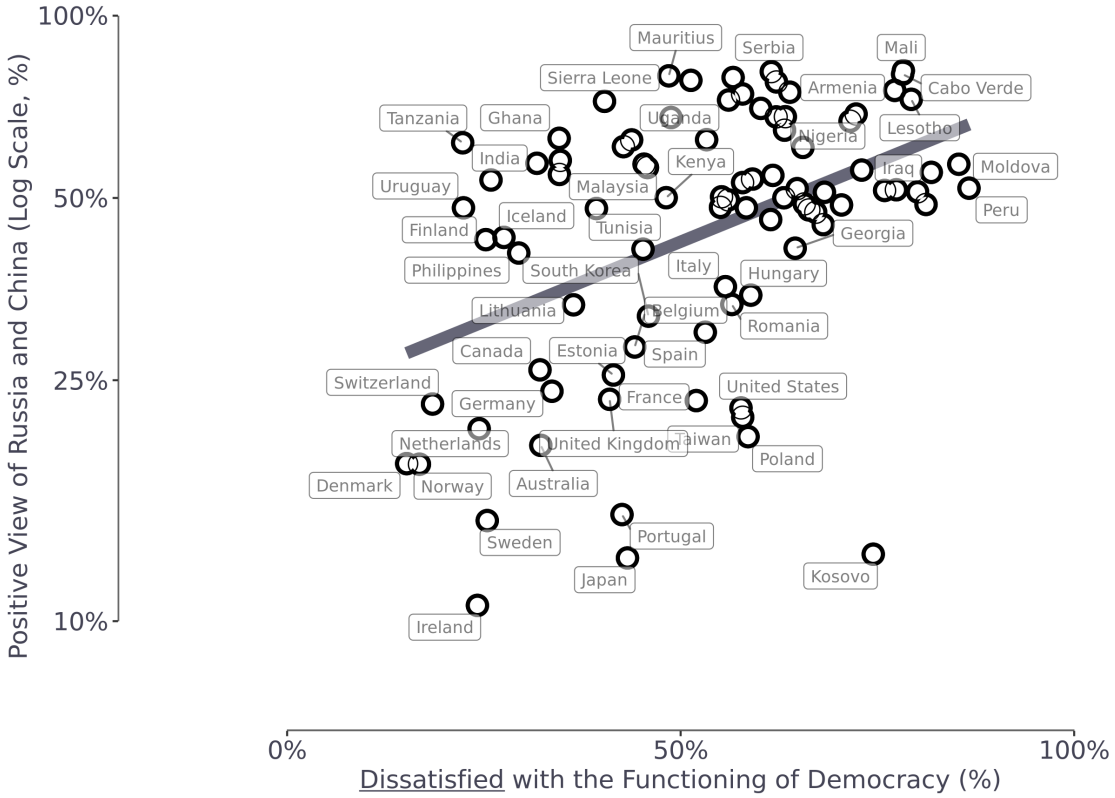


Figure 21: *In societies in which democratic institutions are perceived to be underperforming, citizens are more likely to hold receptive attitudes regarding Russia and China. Data on satisfaction with democracy from the Cambridge Global Satisfaction with Democracy Dataset/HUMAN Surveys Project (latest update, January 2022).*

[22] Roberto S. Foa (2018). "Modernization and Authoritarianism." *Journal of Democracy*, 29 (3), 129–140.
[23] Roberto S. Foa (2021). "Why Strongmen Win in Weak States." *Journal of Democracy*, 32(1), 52-65.

Public Opinion During the Cold War

How Bad is Today's Animosity Compared to Earlier Times?

In recent years, it has become common to talk of a "New Cold War" between the United States and both China and Russia, in which mutual animosities have reached a critical level. However, this raises an obvious question. If we could somehow obtain polling information from the 1970s and 1980s, would today's level of hostility and distrust really reach the levels that existed in the past?

An answer to this question can be found below, in Figure 22. This shows how U.S. public attitudes to Russia and China in recent years compare with figures obtained from surveys going back to the 1950s – spanning the key decades of the Cold War.

Sadly, the implications are not especially reassuring: American attitudes towards Russia have not been this bad since the mid-1950s. Meanwhile, though China has not launched any similar war, opinions of the country fare little better. Current American opinions towards the country are similar to how the USSR was viewed at peak moments of superpower animosity, such as following the Afghanistan invasion of 1979.

Nonetheless, historical data does provide one cause for optimism. For a substantial period during the middle of the Cold War, relations between the United States and Russia recovered. And once leaders from both sides declared a diplomatic *détente*, mutual perceptions improved. From the mid-1960s until 1979, around a third of Americans even viewed Russia quite favourably. Of course, before relations were repaired, both countries first underwent the 1962 Cuban missile crisis. And if what it takes before leaders bring their societies closer together is the prospect of mutual annihilation, then that - perhaps - is a somewhat less cheerful prospect.

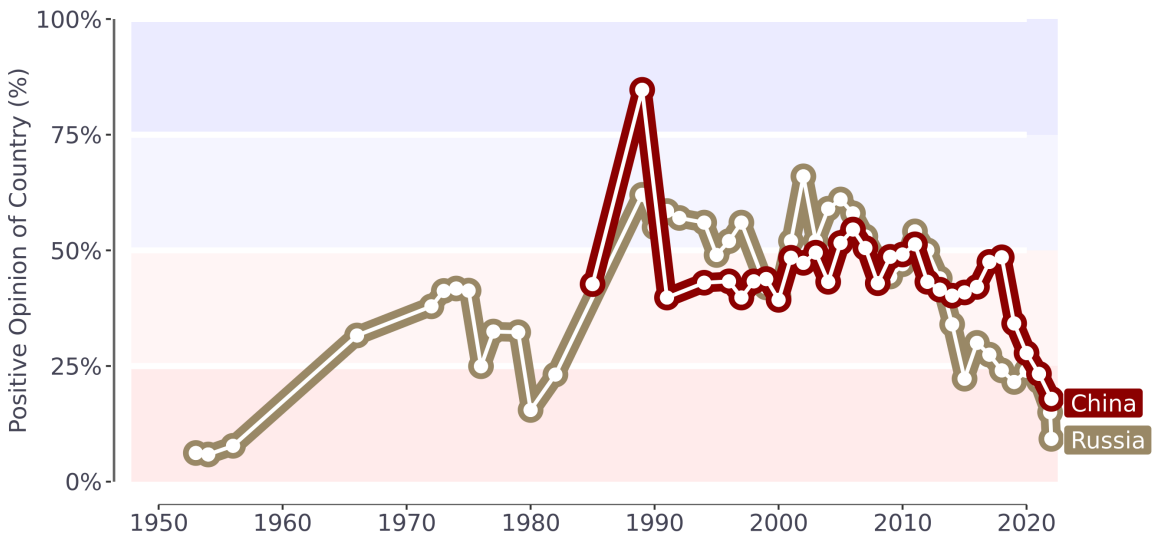


Figure 22: *Long-term public opinion in the United States regarding Russia and China. Today's negative assessments of the two countries are similar to the levels of hostility recorded by public opinion surveys in the 1950s, during the very early years of the Cold War. Cold War figures are based on historical surveys by Gallup, rescaled for equivalence with contemporary sources; both survey sources referred to "Russia" (rather than the Soviet Union) in question formulation.*

Rival Economic Spheres?

For developing countries, however, an alternative model now exists. With the 2013 launch of China's Belt and Road Initiative (BRI), more than $4tn has been committed to 147 participating countries, providing funding for transportation projects, port construction, and energy infrastructure without the same conditionality required by western bilateral and multilateral aid. Thus far, as a means of raising China's international profile, it appears to have been successful: countries receiving more assistance from the Belt and Road Initiative since its inception have significantly more positive views of China today than those which did not (Figure 23). While it is the case that some countries, notably Sri Lanka and Malaysia, have sought to renegotiate or reduce dependence upon Chinese capital, these appear to be the exceptions rather than the rule. In the large majority of cases, Chinese financial support and Chinese "soft power" appear to positively reinforce one another.

The broader objective of the Belt and Road Initiative is not only to offer a Chinese model of development, but also to reshape economic geography through infrastructure linking Eurasian and African economies to a Chinese core. In this way, China's rise is leading to a bifurcation in the global economy. On the one hand, countries in Latin America, Eastern Europe and southern Africa continue to rely upon western investment, aid, and exports. Yet a large and growing bloc of countries now count China as their primary trading partner. This may help explain why in many developing Asian democracies – for example Mongolia, Indonesia or the Philippines – a majority of the public still feels positively about China, whereas in regions such as Eastern Europe or Latin America – which depend economically on Europe and the United States – attitudes to China are less enthusiastic.

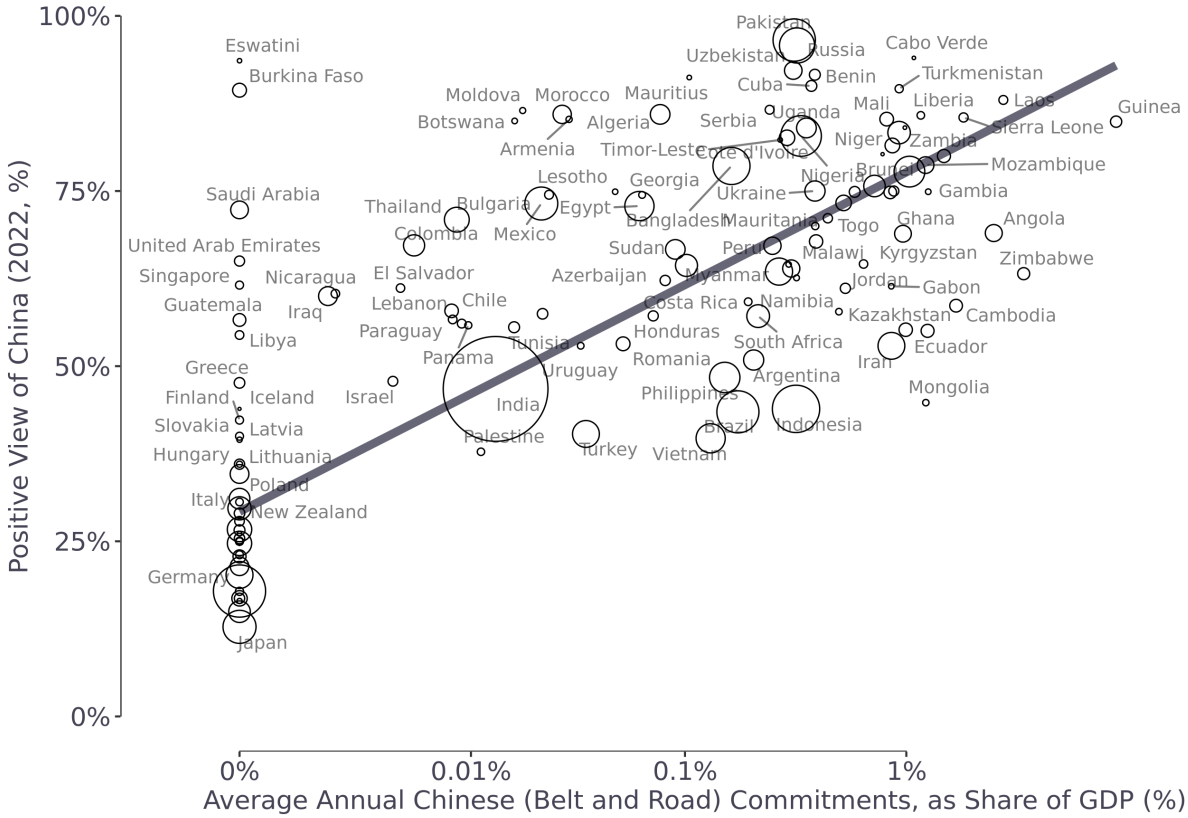


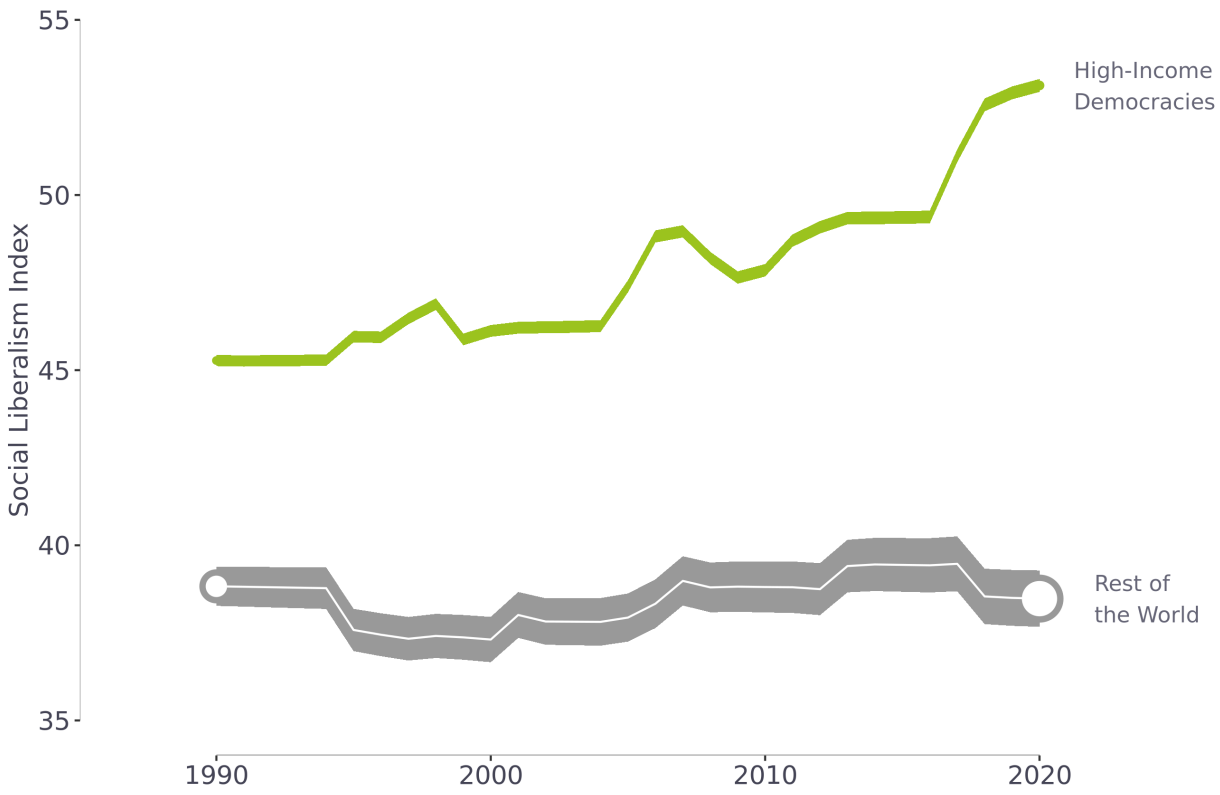
Figure 23: *Across the world, countries that have received more support from China's Belt and Road (BRI) initiative express more positive views towards China today. Moreover, this correlation has strengthened over time – suggesting that Chinese assistance has been effective in improving China's image in the broader world. Data on Chinese Belt and Road commitments over the period from 2013-2017 are from the AidData Global Chinese Development Finance Dataset, Version 2.0. GDP data are from the World Bank's World Development Indicators Data API.*

The Global Values Divide

Finally, one last factor to consider is how the west's recent turn towards "cultural politics" is perceived in other countries, in ways that affect its reputation differently in socially liberal and socially conservative parts of the world.[24] In recent years, new progressive causes such as transgender rights, gay marriage, and fourth-wave feminism have brought major changes to societal norms in western societies.

Yet, as western societies have become steadily more secular, supportive of LGBT+ rights, and active in the advancement of ethnic minority and women's empowerment, the rest of the world has not followed. This can be seen quite clearly from Figure 24, which shows change over time using an index of socially liberal survey items such as lifestyle tolerance (for example regarding homosexuality, drug use or prostitution), individualism, or gender equality. In short, as western societies have moved in a progressive direction, other cultures around the world have not – and the gap has been widening over time.

This has opened an opportunity for political leaders such as Vladimir Putin, who



High-income democracies (World Bank 2022 high income threshold): Australia, Austria, Belgium, Canada, Chile, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, South Korea, Latvia, Lithuania, Luxembourg, Malta, Netherlands, New Zealand, Norway, Poland, Portugal, Puerto Rico, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Taiwan (ROC), Trinidad and Tobago, United Kingdom, United States, Uruguay.

Rest of the World: Albania, Armenia, Azerbaijan, Bangladesh, Belarus, Bolivia, Bosnia, Brazil, Bulgaria, China, Colombia, Egypt, Georgia, Guatemala, Hong Kong, India, Indonesia, Iran, Iraq, Jordan, Kyrgyzstan, Mexico, Montenegro, Nigeria, North Macedonia, Pakistan, Peru, Philippines, Russia, Serbia, South Africa, Turkey, Ukraine, Vietnam, Zimbabwe.

Figure 24: *Index of social liberalism, consisting of bootstrap selections from the complete range of items within the World Values Survey that reflect belief in individualism, freedom of choice, support for democracy, and personal autonomy (Foa et al. 2022). While high-income democracies have shifted dramatically towards more socially liberal attitudes, this has led to a wide "values-gap" between the west and the rest of the world.*

[24] Plamen Akaliyski & Christian Welzel (2020). "Clashing Values: Supranational Identities, Geopolitical Rivalry and Europe's Growing Cultural Divide." *Journal of Cross-Cultural* Psychology, 51(9), 740-762. DOI:10.1177/0022022120956716

presents himself as a defender of "traditional" values in the face of a so-called western "decadence." And this, in turn, may be one key factor behind Russia's growing popularity in culturally conservative regions, such as the Middle East, Africa, or South and Southeast Asia.[25]

At the same time, Chinese social attitudes are relatively progressive with respect to secularism, women's rights, or sexual diversity, and China has never presented itself as a "bulwark" against western liberalism in the same way as Putin's Russia. Yet, a core element of Chinese foreign policy is the respect of national sovereignty. Mainly interpreted to mean cooperation with all political regimes, it also extends to acceptance of differing societal norms and practices. This allows China to put itself forward as a benign alternative for societies where people fear encroachment by western culture, media, and lifestyles – and one that will tolerate policies aimed at blocking or reducing such influence.

Across the world, therefore, we also find a strong association between how positively societies view Russia and China, and their degree of cultural conservativism – or conversely, between negative views and a society's level of social liberalism (Figure 25). In all of the world's socially conservative societies, notably across the Middle East and Sub-Saharan Africa, the two countries are viewed favourably by members of the public. Meanwhile, socially liberal societies in Northern Europe, Australasia and Latin America are those which now perceive Russia and China most negatively. This association was weak one decade ago, yet it is quite clear today.

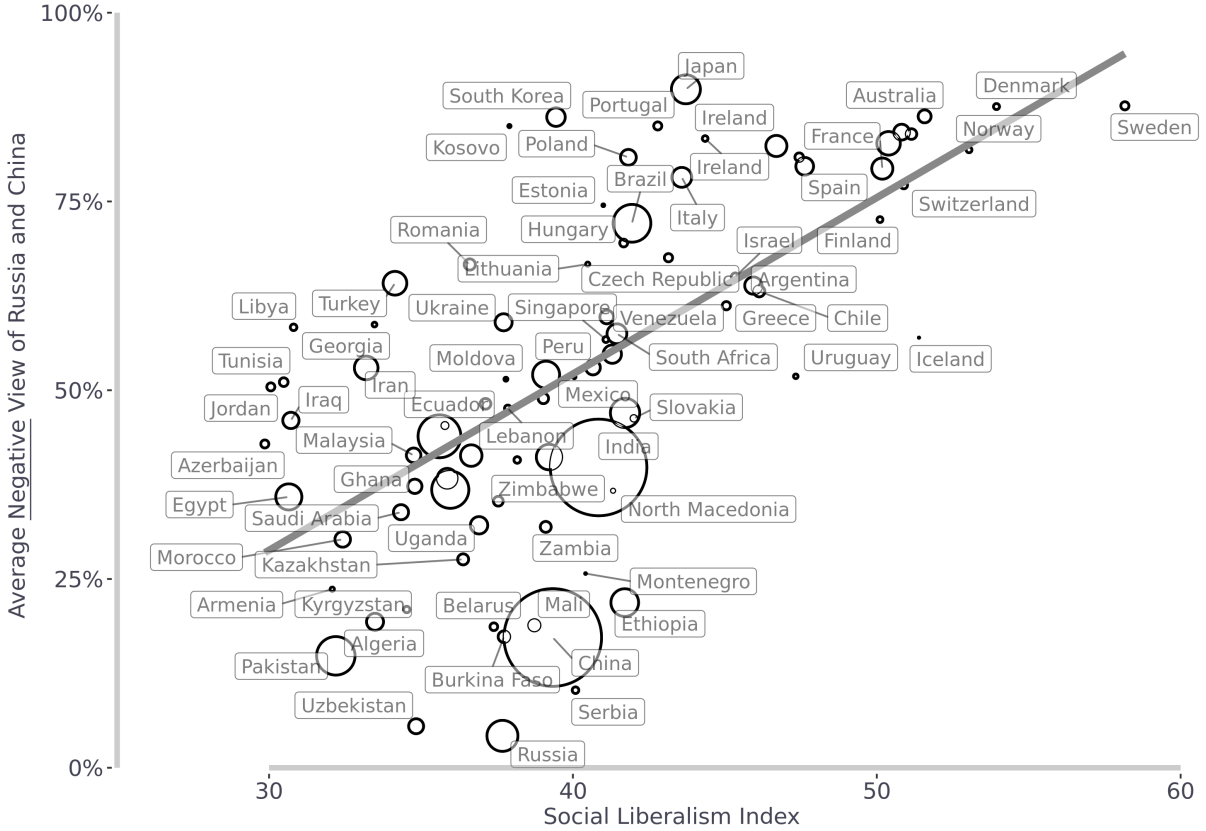


Figure 25: *Across the world, social liberalism is now one of the strongest predictors of whether a society holds a positive – or negative – view of Russia and China. This association has developed only during the past decade, and was quite weak ten years ago (R = 0.64 today; R = 0.35 in the past). Index of social liberalism selects from items that reflect values of individualism, freedom of choice, support for democracy, and personal autonomy (see Roberto S. Foa, Yascha Mounk & Andrew J. Klassen (2022). "Why the Future Cannot be Predicted".* Journal of Democracy, *33(1)). The figures for Russia and China here only report favourability towards the other country.*

[25] Paul F. Robinson (2020). "Russia's Emergence as an International Conservative Power." *Russia in Global Affairs*, 18(1).

9. Conclusion

In *The Clash of Civilizations*, Samuel Huntington began by justifying his suggestion to see the world in terms of "civilisational blocs" with an acknowledgement that all such classificatory schemes are, in a fundamental sense, arbitrary impositions upon reality. They are only "heuristics" tools for interpreting current events, based on what appear to be the most relevant features of human identity or belonging at a given moment in time. During the immediate post-Cold War environment of the 1990s and 2000s, events such as European Union enlargement, the rise of Islamic terrorism, or the genocide of Bosnian Muslims by orthodox Serbs, seemed to validate a view of the world in which shared histories, religious and cultural identities could best explain the behaviour of states and political actors. Yet this, argued Huntington, did not make civilisations "real" – merely a more useful paradigm for interpreting the world. During the Cold War, international relations had been conducted on the basis of a different scheme – the struggle between communism and capitalism – and that, too, was little more than a useful simplification for its time.[26]

As we enter the third decade of the twenty-first century, the kaleidoscope is turning once more. Yet today's geopolitical divide does not depend upon historical ties or cultural affinity. Rather, it finds its basis within politics and political ideology: namely, whether regimes are democratic or authoritarian, and whether societies are liberal or illiberal in their fundamental view of life. In the first category are maritime societies based on trade, the free flow of peoples and ideas, and the protection of individual rights: in this grouping we find the countries of western Europe, the settler societies of both North and South America and Australasia, as well as high-income insular democracies in North Pacific Asia.[27] By contrast, the second category is comprised of historically land-based, continental empires: Iran, Russia, Central Asia, China, and the Arab Middle East. In that sense, comparisons with the Cold War are not entirely mistaken. For even though this latter grouping spans the full range of political institutions and ideologies – from Islamism to secular communism, and from traditionalist monarchism to mass movement populism – they are united in their rejection of western modernity, and its associated political and social alternative.

For the time being, of course, we cannot say for how long this global divide will endure. At first glance, it appears fragile. Already the newly-emerging high-income democracies of this world – in South America, Asia-Pacific, or Eastern Europe – are gravitating closer towards western powers. And even if authoritarian regimes are successful in holding out against external geopolitical pressure, they face significant internal threats to their stability. Such challenges include diminishing returns to economic growth, a widening gulf between the values of the regime and the aspirations of their peoples. Finally, the non-liberal bloc begins this competition at a significant strategic disadvantage: western countries still account for the lion's share of global military spending, foreign aid, and cultural influence. By contrast, the nations who feel closer to China and Russia are poorer, less stable, and more dependent upon their external support.

And yet, the same was true of the Communist bloc in the late 1940s – and nevertheless the Cold War lasted another four decades, with the Soviet Union able to put down protests in Hungary and Prague, wall off West Berlin, and emerge as a leading rival in the race for nuclear dominance and space exploration. The outcome of today's new geopolitical divide is no more certain. What is now clear, however, is the basis upon which these new battle lines are drawn.

[26] Samuel P. Huntington (1996). *The Clash of Civilizations and the Remaking of World Order*. New York: Simon & Schuster.
[27] Roberto S. Foa & Anna Nemirovskaya (2019). "Frontier Settlement and the Spatial Variation of Civic Institutions." *Political Geography*, 73: 112–122. DOI: 10.1016/j.polgeo.2019.05.013

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Methodological Annex

Methodology I: Survey Source Items

Public opinion data on attitudes towards Russia, China and the United States come from 30 different survey sources that were combined and standardized for this report (see Table 1). For the majority of sources, questionnaires requested a general attitudinal response on a four-point response scale: "very favourable"; "favourable"; "unfavourable"; "very unfavourable". In cases where a middle category was offered (neither favourable nor unfavourable), the equal redistribution of these responses to either side was found to produce equivalent results to contemporary surveys conducted without such a response option.

The following overview of survey items includes minor adjustments from the original survey questionnaires, such as replacing the names of countries, capitals, or institutions with generic markers to display just one version of each question. Numerical answer values were reordered for consistency and may not be in the order asked in surveys, but all valid responses were maintained. Non-valid, unusable, or missing answers were coded using four standard values (do not know, refused to answer, not applicable, and missing), but these values are all treated as missing data when aggregating national scores for analysis.

Attitudes towards Major Powers:

Afrobarometer: *"In general, do you think that [other country]'s economic and political influence on [this country] is mostly positive, or mostly negative, or haven't you heard enough to say?"*

Arab Barometer: *"Now I would like to ask you questions about the Arab world and international relations. Please tell me if you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable opinion of [country]."*

Central Asia Barometer: *"Thinking about other countries, please tell me if you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable opinion of [country list]."*

International Republican Institute: (1) *"Please tell me your opinion of each of the following countries."* (2) *"How would you evaluate the current state of the relationship between [this country] and the following countries?"*

Gallup USA: *What is your overall opinion of [country]? Is it very favorable, mostly favorable, mostly unfavorable, or very unfavorable?*

IranPoll: *"Now I am going to read to you names of some countries. Please indicate to what degree you have a favorable or an unfavorable view of each."*

Latinobarometro: *"I would like to know your opinion about the following countries and organisations. Is your opinion very favourable, somewhat favourable, somewhat unfavourable, or very unfavourable towards... [country]?"*

Pew Global Attitudes and Trends: *"Please tell me if you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable opinion of [country]."*

Latana: *"What is your overall perception of [country]? Is it very positive, somewhat positive, somewhat negative or very negative?"*

Sinophone Borderlands Survey: *"On a scale from 0 (negative) to 100 (positive), how would you say you feel about [country]?"*

Zogby Middle East Survey: *"For each of the following countries, please tell us if your attitudes are favorable or unfavorable."*

Methodology II: Variable Selection and Validity

i) Semantic Equivalence and Item Selection

The survey questions aggregated in our dataset are subject to strict standards of semantic equivalence to ensure the indicators represent valid measures of public attitudes towards major geopolitical powers. The first such filter is whether the claim of equivalent meaning stands up to basic face validity. For example, items were excluded if they were "framed" within a specific policy domain, such as if respondents were asked regarding their views of the United States "as an economic partner," or "as a military and defence partner." Domain framing was associated with large differences in respondent outcomes, and no simple linear rescaling solution could be found. In addition, items involving comparison of any kind were excluded, due to context-specific semantics. This includes comparison of one country to another (for example, being asked if one feels closer to China *or* the United States), as well as comparison over time (for example whether respondents "feel closer" to country now than some point in the past, whether general or over a specific period).

ii) Generalisability

In order to ensure the results that we present are consistent over time and accurately reflect the average citizen, responses were first grouped into binary classifications to obtain percentages for each category. More than 80% of survey observations used in the analysis consisted of 4-item scale responses that could easily be converted into binary classifications around the midpoint. For some observations in the series a 5-item scale was used, with respondents given the option of a "neutral" answer (separate from "don't know" or not answering the question). In these cases, splitting neutral responses equally between positive and negative answers, produced results closely approximate to 4-item scale outcomes from identical country-years. For regional averages, we took the population-weighted mean of the most recent observation for all countries in that region over time. The use of population weighting is especially important in regions where a large number of small states would disproportionately affect country averages. All data for regional or global averages are averaged based on population-weighting to ensure that figures reflect an estimated average for the pool of all individuals in a region and do not disproportionately represent trends in small or micro states.

iii) Sample Consistency

Constant-country samples are used when presenting aggregated data across time periods. This helps ensure that changes on charts are not due to countries dropping in and out of the analysis, but are only due to changes in actual collected data. We do this by only including country cases that are covered by survey data for the entire observation period from start to finish. Sometimes this requires "rolling over" survey results for periods in which no new survey data was collected. In these cases we are effectively using the "most recent" survey observation for each country in each time period. Fortunately, because the dataset includes such a large number of survey sources, for many regions there are few countries that lack consistent data. Many countries now report multiple observations per year from multiple survey sources.

iv) Cross-Validation of Sources

In order to check that there are no remaining sources of unobserved bias between different data sources, and that filtering by semantic equivalence was successful, we also cross-validated values from across sources via sensitivity analyses to check for equivalence.

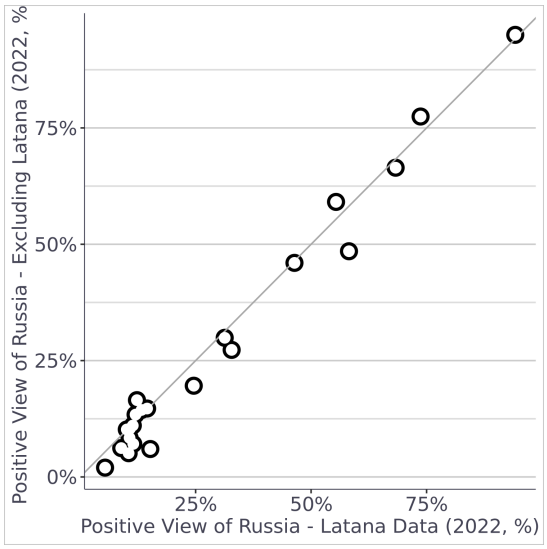
Data Validation Via Sensitivity Analysis

The combination of data from mulitple survey projects has the potential to introduce "source biases", as differences between projects in sampling, methdology (e.g. phone interviews or web panel collection), or question framing lead to "higher" or "lower" results than would otherwise have been the case. When combining sources to produce a series, this brings the risk that apparently changes in country results from one year to the next, do not reflect trends in public opinion so much as a shift from reliance on one survey source to another.

In order to investigate and where possible limit this from occurring, our aggregation code also produces "sensitivity analyses" for the most important sources, which allows us to see how the addition of each dataset influences the results, for example, by comparing results from that source with the combined results from all other sources. If a source is found to have such an effect, it must either be excluded, or re-examined to see whether a reason for the discrepancy can be found.

In particular for the current report, we were concerned to ensure that changes reported for the current year – that is, since the Russian invasion of Ukraine – were the result of actual shifts in public opinion and not simply an "artifact" produced by changes in survey source. For this reason, we paid close attention to sensitivity analysis results for 2022, shown below for two of the major sources updated this year.

(i) Latana



(ii) Pew Global Attitudes and Trends

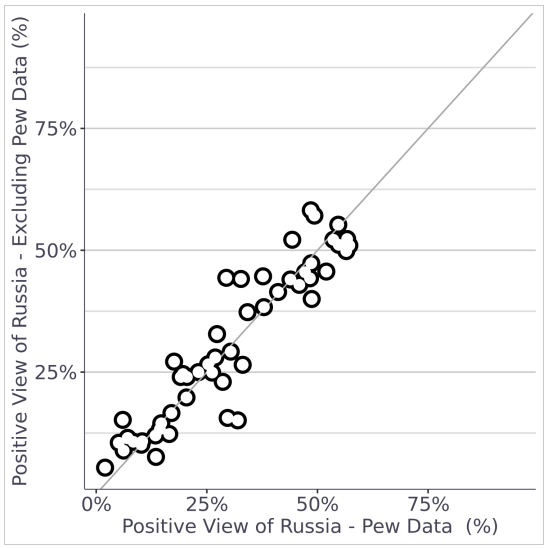


Figure 26: *Validation of survey sources used in the data harmonisation process, by comparing country-year data points from each of two main constituent sources (Latana and Pew) with the corresponding country-year observations from other data sources combined. Observations fall very close to the 45-degree line, implying high or near-perfect equivalence.*

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