



FLEISHMAN
HILLARD

ACHIEVING OUTSIZED IMPACT

Country Reputation
in a Disrupted World

February 2025





Countries need to work harder than ever to drive their agenda on the international stage. Whether to generate economic growth, attract investment, navigate diplomatic challenges, or address societal needs, building a favorable country reputation through soft power is essential.

Amid unprecedented global complexity, the world's largest countries are no longer seen as effective at solving global challenges. For mid-sized and small countries, the goal is to achieve outsized impact. Effective communication must sit at the heart of their efforts. This study shows how to put that ambition into action.

Table of contents

CONTENTS

Executive Summary	4
Our Objective	5
Navigating the Disrupted Landscape	6
Achieving Outsized Impact on Key Issues	11
Leveraging Country Reputation Drivers	20
Taking Action to Create Impact	26
The Agency Partner for You	29

Executive Summary

In a world of geopolitical fragmentation, economic volatility and societal upheaval, countries around the globe are facing greater complexity than ever before. They will be defined by how they navigate this pressure-filled landscape.

If they can do so successfully, the results are significant: economic opportunity, greater peace and security, progress on climate action, humanitarian crises and other challenges, and results on the issues that matter most to their people.

A strong country reputation is essential to their success. **Achieving Outsized Impact: Country Reputation for a Disrupted World** outlines how to achieve it through better, smarter communications. The opportunity for impact is clear.

In our study, 73% of those surveyed believe big, traditional powers are not as effective on the global stage as they once were. Only 49% strongly agree these countries are effective at solving global challenges.

Instead, 75% agree that mid-sized and smaller countries should have a greater role in helping solve

global challenges, while 79% believe society would be more equitable if all countries are given a voice, regardless of their economic size and impact. As some large countries create disruption, the mix of agility, consistency and fairness among mid-sized and smaller ones can work to their advantage.

To take advantage of this environment, FleishmanHillard's International Affairs practice examined how countries can identify their strongest attributes, define their character traits, showcase their leadership, and engage with their stakeholders more effectively. On the issues of geopolitics and diplomacy, economic development and trade, sustainability, and cultural economics, the study then provides the roadmap to use communications to create soft power and influence. This will help countries best stand out in a crowded political, business and media environment.

As countries look at the year ahead and beyond, this study can help shape new types of solutions to the challenges they face. Using the findings will enable them to create value, growth and opportunity that has lasting, outsized impact.



Our objective

This study was created for governments, agencies, sovereign wealth funds, economic development boards and state-owned companies looking to navigate the challenges of country reputation and create impact in the world.

We selected the United Kingdom and United States as two important and influential partners in diplomacy, trade and investment, culture, sustainability and more, as well as the home to many of the international media, research groups, advocacy bodies and other organizations that shape the international agenda. This often makes them the first target for communications and stakeholder outreach by other countries.

Equally, they are also two markets undergoing disruption and change, seemingly in opposite directions. Therefore, they help represent wider geopolitical, economic and societal trends.

For this research, FleishmanHillard analyzed the opinion of “informed audiences” in each country. These individuals were defined as stakeholders who are actively engaged and interested in global issues or current events, as well as other relevant topics such as sustainability, human rights, health or technology. They form opinions based on facts, and are influenced by levels of transparency, effectiveness of communication and perceived trustworthiness, making them important amplifiers for countries building and maintaining a strong reputation.

FIELDWORK DATA PROFILE

Research design, fieldwork and analysis was conducted by TRUE Global Intelligence, FleishmanHillard’s cutting-edge research and data intelligence consultancy. Research methodology was:

- 10-minute online survey fielded in the United Kingdom and United States
- Survey occurred from October 30 to November 6, 2024
- Total sample size of 200 (N=100 per market)
- Natural fallout across age and gender
- Screening for characteristics related to informed perspectives and engagement on international issues

Navigating the disrupted landscape

Countries are facing significant pressure to have greater impact in a perma-crisis environment. Traditional powers are not meeting expectations, opening the opportunity for mid-sized and smaller countries to shape the agenda and lead efforts for solutions.



Bracing for disruption

Disruption across all aspects of society presents an unmatched challenge to governments. On a hyper-competitive global stage, countries need to reshape how they navigate conflict and uncertainty to achieve impact.

The rules-based, international order that shaped life for more than a half-century is being rapidly replaced by a new world of confrontation. Instead of multilateralism and globalization, we are seeing a return to power-driven, self-interested nation-states. To gain advantage and achieve their agenda, countries are being forced to evolve. Stagnating or failing to change will create significant risk amid conflicting interests and skeptical audiences.

The second Trump administration's already combative approach to diplomacy and economic policy is stoking tensions and reinforcing divides. Friction and conflict will prompt some countries to question their dependence upon traditional allies for security and defense — whether bilaterally or through long-standing alliances like NATO — and create uncertainty and conflict in economic

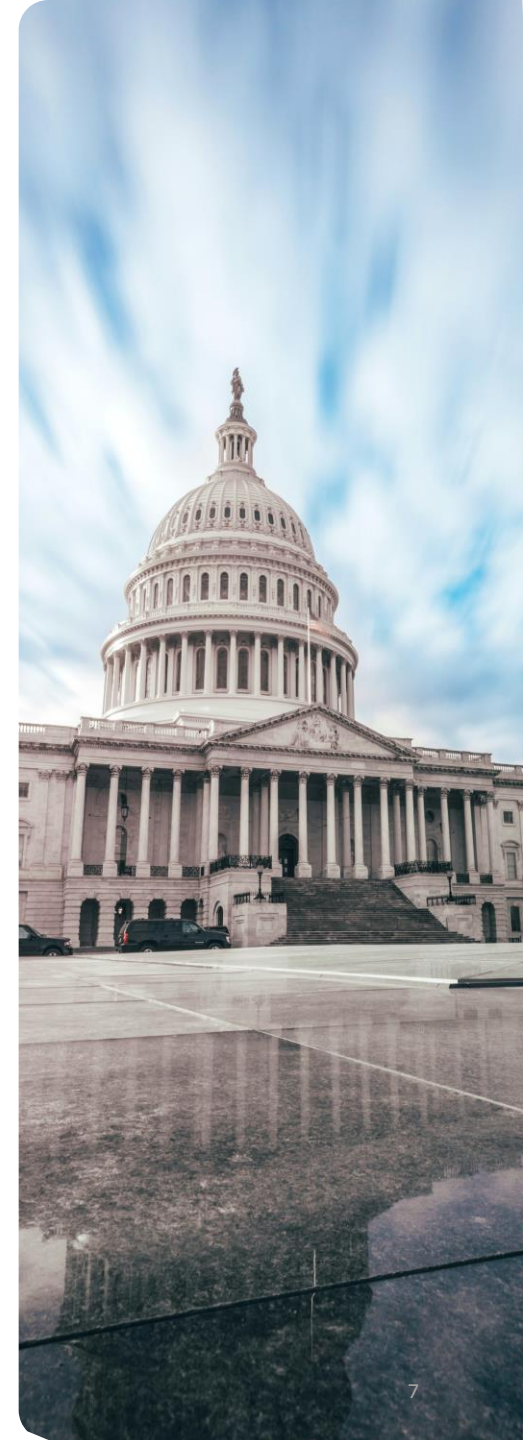
relationships. Already, it is reshaping relations with neighbors Canada and Mexico, prompting backlash in both.

The push-and-pull dynamic between the United States, the EU and China will continue more broadly. Some countries will clearly gravitate toward one pole, potentially to the detriment of relationships with others. Other countries will aim to carefully balance competing interests among all three, a challenge of diplomacy and communications.

The ongoing emergence of the BRICS Plus, as individual countries and a collective, has shown the potential of fast-rising, non-Western powers and prompted many countries to look to new allies and multilateral forums for support. RCEP, CPTPP and other wide-ranging trade alliances have put smaller countries

alongside the world's largest economies, providing opportunities for growth and influence. Amid continued regional conflicts, the Middle East continues to ascend as a global hub for economic opportunity, geopolitical heft and cultural connectivity.

As the largest countries grapple with economic stagnation and inflation, as well as nationalist tendencies, foreign aid, and international development budgets and institutions like the WHO, USAID and Paris Agreement will remain under threat. The pressure it will create for recipients of aid, as well as countries that depend upon the multilateral system to support their needs, will be immense. Finding more productive ways to shape action about solving global challenges will be pivotal, particularly for mid-sized and smaller countries vulnerable to systemic shifts.



Expectations unmet

In a period of continual tension and friction, no country is responding well, and few are seen to be doing their best for the world. They will be under increasing pressure to show positive impact on a range of challenges.



72%

No country is responding to global challenges as well as it could be



50%

Believe countries are trying to do their best for the world

Informed audiences have high expectations for governments to act, not just talk. With these expectations unmet, countries are likely to feel a growing obligation and pressure to do more and better.

When asked to rank the five most important areas for governments to address around the world, respondents coalesced around four topics: **Economic stability and growth (including job creation), climate and environmental action, public health and wellness, and human rights.**

Secondary priorities include military and security risks (including conflict, terrorism and cybersecurity), migration and refugee policies, addressing inequality, and global cooperation (including diplomacy and multilateralism).

Audiences strongly believe most countries currently are not meeting the mandate. **Fully 72% stated that no country is responding to global challenges as well as it could be,** with just a small percentage believing the opposite.

They also question countries' efforts and intentions. Only 50% said that most countries are trying to do their best for the world population. U.S. audiences are notably more negative, with 40% agreeing compared to 60% of UK audiences.

New opportunities for impact

Large, traditional powers may wield authority, but do not necessarily enjoy a perception of effectiveness. That creates opportunities for mid-sized and smaller countries to have more meaningful impact.

Incumbent governments received a harsh message from voters throughout 2024, the year of elections worldwide. Now, 2025 will be the year in which governments, old and new, are compelled to act. They do so at a moment of difficulty for the world's largest powers, because informed members of the public have low levels of confidence in them.

It may present a compelling opportunity for ambitious mid-sized and smaller countries — whether defined by GDP, population size, geographic footprint, global influence or other factors. They have the opening to shape or lead in areas like diplomacy, climate action, economic growth and trade, travel and cultural exchange, and more. As they face greater pressure, their future may depend upon it.

In our study, **73% of those surveyed believe that big, traditional powers are not as effective on the global stage as they once were. Only 49% strongly agree that big, traditional powers are effective at solving global challenges.**

Informed audiences are ready for this shift. **75% agree that mid-sized and smaller countries should have a greater role in helping solve global challenges, while 79% believe society would be more equitable if all countries are given a voice,** regardless of their economic size and impact.

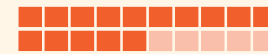
As some large countries create disruption, the mix of agility, consistency and fairness among mid-sized and smaller ones can work to their advantage.

73%



Big, traditional powers are not as effective as they once were

75%



Mid-sized and smaller countries should have a greater role in solving global challenges

79%



Society would be more equitable if all countries are given a voice

Shaping reputation for impact



75%

Do not need to visit a country to have an informed opinion about it



52%

Believe positive news about countries may be propaganda or public relations efforts

Reputation is at the heart of driving outsized impact. But perceptions are changing and may be fragile, so must be cultivated and managed carefully through effective communication.

The approach to shape perceptions of a country is quickly changing. New channels and conduits of information are creating a more fragmented environment to manage, while some audiences doubt whether any information about countries can be trusted. The rapid rise of mis- and disinformation targeting countries adds greater difficulty to managing reputation, particularly in situations of conflict or disagreement.

A large majority of **75% of informed audiences feel they do not need to have visited a country to have an informed opinion** about it. This creates the need for more sophisticated, effective communication to shape perceptions among audiences whose views will be determined by many competing channels and forces.

However, **52% believe that positive news about countries is likely to be propaganda or public relations efforts**, with UK audiences far more skeptical (63%) than U.S. audiences (42%).

Conveying credible information through trusted sources is essential to overcome this doubt. It will require a wider range of spokespeople, more concrete evidence regarding commitments and priorities, and more independent validation of progress.

Countries are not generally starting from a strong position. With **59% of audiences believing a majority of countries do not enjoy a positive reputation currently**, there is work to do to convince audiences that governments are effective, responsive and engaged in the issues that matter to the public.

How they communicate with stakeholders and the public becomes vitally important. Crafting targeted messages to reach specific audiences, creating plans that leverage the right channels, and engaging in two-way dialogue not just one-way promotion, are all part of overcoming skepticism and earning trust.



Achieving outsized impact on key issues

Four issues stand out as opportunities for outsized impact — and areas for urgent but beneficial action. Particularly for mid-sized and smaller countries, effective communication on these topics can create greater advantage.

Issue 1:

Economic development and trade

The drive for economic growth and the challenge of economic instability are vexing government leaders around the world. How countries adapt their positioning to generate international trade and investment has taken on greater importance, particularly as some of the largest countries show that protectionism and aggressive tariffs will become the norm.

While these largest countries benefit from diversified economies and resilient supply chains, many of the world's mid-sized and smaller countries are dependent upon a more limited set of sectors and trading partners. Growing their reputation in these areas of expertise to create investment, and using communications to strengthen trade relationships, requires care and sophistication.

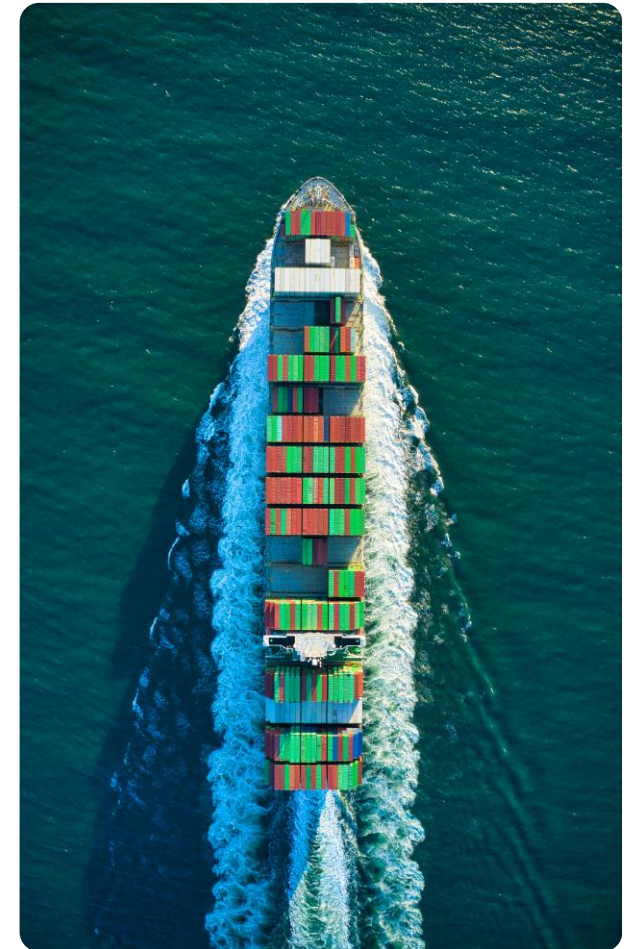
When asked about the top five factors that make a country attractive for doing business, informed UK and U.S. audiences said the following:

- **Political stability ranks highest**, with 65% ranking it as one of the top five most important considerations.

- **A strong legal framework and rule of law** (57%) and **favorable tax policies** (56%) rank second and third.
- Ranking slightly lower as top five factors were access to skilled labor (50%), a strong education system (48%) and technological infrastructure (44%).
- Other factors, such as support for entrepreneurship, convenient location for business and trade, regulatory access to key markets, and access to unskilled labor all ranked notably lower.

Audiences have a strong perspective on countries' chosen trade and investment policies, noteworthy given the creeping economic protectionism and trade restrictions built into many countries' industrial policy. 67% would feel more positively toward a country with open market access, as opposed to only 13% toward a country with restricted market access.

Similarly, 75% favored active international trade practices compared to 13% feeling positively about isolationist trade practices. Finally, while 25% would feel more positively toward a country with higher corporate tax rates, 49% feel more positively toward low corporate tax rates, relevant given discussions about global and national taxes on digital trade, services and more.



Issue 1:

Economic development and trade

Communications considerations:

The dynamics around communication on trade and economic development are shifting rapidly, as the world braces for new trade wars and continued supply chain disruption. While countries will continue promotional efforts to drive foreign direct investment (FDI) and support domestic job creation, they must now address new global economic complexities.

DEFINE EXPERTISE AND ADVANTAGES

- As economic competition ratchets up, countries will be forced to more clearly define the benefits to business from their competitive advantages and areas of expertise. Particularly for mid-sized and smaller countries, using communication to differentiate in a few key sectors, rather than attempting to be effective in a wide range of areas that lose impact, will be even more essential.

GO BEYOND INCENTIVES

- Based on our study results, businesses will see political stability, the rule of law and other indicators of consistency as equally or more important than low taxes or favorable incentives. Communicating these strategic advantages, their commercial benefits, and how they help companies overcome volatility will be critical to achieving impact in the years ahead.

MANAGE PROTECTIONISM

- Our audiences indicated that protectionist economic policy does not lead to favorable perceptions of countries. As the Trump administration escalates trade disputes and countries are forced to respond, those countries will need to carefully manage the reputational impact of those protectionist measures, which may send a negative message to other countries not affected, and articulate their commitment to free trade and international economic alignment.

Issue 2:

Geopolitics and diplomacy

The ability to navigate geopolitical disruption through effective diplomacy sits at the heart of country reputation. In a fragmented world, with traditional alliances being unsettled and long-standing relationships now strained, countries will be judged by what they do on the world stage, with whom they associate, and how they manage complexity and competing interests successfully.

The Trump administration will shape this landscape, and countries are already having to react to sudden crises that affect their national security, economic stability and societal well-being. The merit and popularity of this approach remains to be seen — and in fact, counters many of our findings on how to build a strong country reputation for greater impact.

But the origins of disruption originate from around the world, from China's global expansion to Europe's reshaping of transparency and regulation. Mid-sized and smaller countries will be particularly vulnerable to decisions by large powers, so they need to evolve their diplomatic approach to build greater influence and resilience.

According to informed audiences, geopolitical and diplomatic factors heavily influence their personal opinion of a strong country reputation. **Top areas include diplomacy and international collaboration (89% ranking as influencing perceptions a great deal or a lot), effective, democratic systems of governance (89%), human rights record (87%) and the reputation of a country's leader (84%).** Only domestic issues like justice and policing score as highly.

Systemic challenges are bringing together some countries for greater collaboration and impact. These united efforts — prominent in climate action with groups like the Small Islands Developing States, but also on trade, security and more — give mid-sized and smaller countries the opportunity for outsized impact.



Issue 2:

Geopolitics and diplomacy

Communications considerations:

Communicating about geopolitical and diplomatic issues feels fraught with peril in this conflict-laden moment. Countries must artfully balance ongoing proactive engagement with protective measures, building their case while guarding against and preempting criticism.

COLLABORATION AND PARTNERSHIP

- Creating visible opportunities for partnership and shared solutions will be central to achieving impact for mid-sized and smaller countries. With informed audiences valuing collaboration as part of a positive country reputation, communicating how a country is engaging in new alliances and partnerships can help build greater trust with stakeholders — including when having to play defense against aggressors.

EFFECTIVE GOVERNANCE

- In an environment of escalated tensions and knee-jerk reactions, showcasing a country's effective systems of governance, thoughtful approach to diplomacy and balanced, rational approach to policymaking will reinforce a country's credibility. In particular, communicating the “why” behind diplomatic decisions will show how they align with a wider strategy.

VISIBLE LEADERSHIP

- Crafting more effective, compelling platforms for national leaders is essential to shaping the global agenda. Mid-sized and smaller countries, in particular, have achieved outsized impact when their leaders leveraged a continual presence in international media and visible profile during international forums for greater impact.

Issue 3:

Climate and sustainability

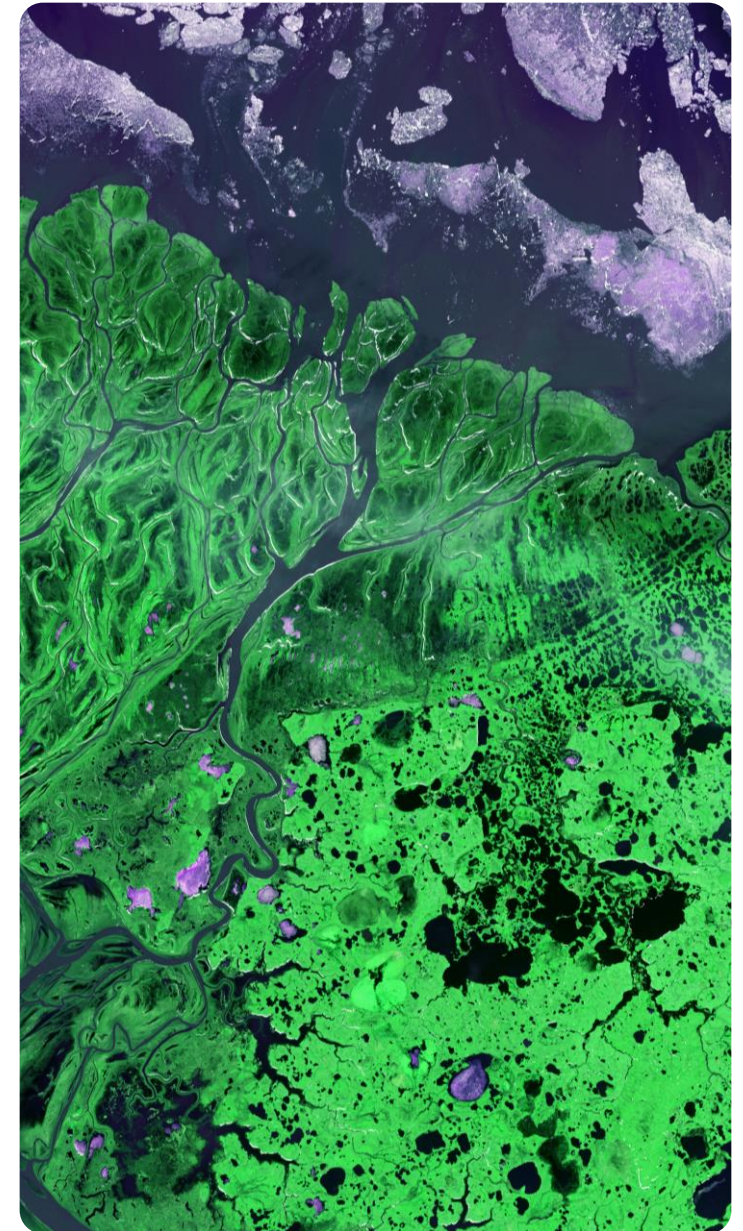
The response to the climate crisis is increasingly defined by divergence, both among major powers and between those powers and the many lower and middle-income countries, many mid-sized and smaller countries, bearing the brunt of the financial burden of climate mitigation and adaptation. In this contentious environment, country reputation will be shaped by climate action. But countries' leaders must be sensitive to how growing divides create risk when communicating their plans and programs, particularly in the United States.

The United States is gripped by the ESG backlash and a likely unwinding of climate mitigation efforts, while Europe continues to apply stricter regulation to accelerate decarbonization. The UK views the energy transition as an economic opportunity, while China recognizes the possibility of using climate action for wider global influence. Countless lower and middle-income countries face untenable costs to transform their infrastructure, businesses and societies, while grappling with the increased impact of global heating on their people.

A substantial **84% of UK respondents felt climate and sustainability efforts — such as carbon emissions reduction, the renewable energy transition, and nature conservation — are highly important** in shaping a country's reputation. **Only 67% of U.S. respondents agreed.**

Similarly, **83% of UK audiences feel commitments to climate action have a significant impact** in shaping perceptions of a country, while **just 65% of U.S. respondents agreed.**

Given the current landscape, this divergence will shape how countries build support for their climate priorities, from climate finance to accelerating the energy transition to responding to climate-related disasters. Countries must carefully consider their strategic approach to ensure they reach the right audiences without creating undue risk of backlash.



Issue 3:

Climate and sustainability

Communications considerations:

How countries communicate about climate and sustainability is at a pivotal point. Even with increasingly severe predictions that the world is losing sight of the 1.5C target and a growing list of climate-induced disasters, countries must carefully manage conflicting demands and expectations when addressing these topics publicly and privately to advance their agenda and protect their reputation.

SHIFTING FOCUS TO ACTION

- After years of promoting 2050 net zero goals, countries now face the challenge of showing increased urgency and meeting demands for action. For those that make climate a centerpiece of their agenda, communication must evolve to focus on shorter-term horizons such as 2030 targets and achieving the UN SDGs, while showing evidence of their progress to-date. They must simultaneously ensure they take calculated positions to avoid criticism from potential detractors.

MANAGING NUANCE

- The nuance of climate action is increasingly difficult to convey. Many countries have accomplished initial steps and are now fully into the difficult work of systemic change. Others, like the United States, are still debating their long-term positions in volatile circumstances. Finding ways to maintain sharp focus and simple messages to reach audiences and tell more nuanced stories that require explanation will require new ways to layer narratives across channels and formats.

COMMUNICATING CONTEXT

- Governments will be sensitive to domestic dynamics around climate, such as the shifting focus toward green jobs and sustainability-led economic growth to make financial costs of climate action more politically palatable. International communications needs do the same, for example, showing how trade and investment initiatives support business growth while enabling leadership on climate action or focusing on the financial impact of extreme weather without becoming caught in discussions about its causes that may alienate some audiences.

Issue 4:

Cultural economics

A new revolution is underway as countries discover the renewed power of cultural economics. In particular, mid-sized and smaller countries are increasingly investing in creative industries and promotion of their culture to achieve global recognition and impact.

Almost half (46%) of informed audiences agree that “set-jetting” narratives — filming in strategic locations to market a destination — elevate a country’s awareness and appeal. HBO’s “White Lotus” choosing Hawaii, Sicily and Thailand provided all three with enhanced awareness, resulting in a surge in luxury tourism bookings and interest in visiting filming locations in Sicily, and reshaping Thailand’s reputation as a high-end travel experience for a new generation of travelers.

Meanwhile, **playing host to a unique cultural experience, such as a major musical event, was identified by 70% of informed audiences in the UK and 47% in the United States as a significant way to impact a country’s position on the world stage.**

Singapore’s recent cultural economics masterclass involved securing exclusive rights to host Taylor Swift’s Eras Tour in Southeast Asia, positioning it as the region’s sole home of one of the world’s biggest cultural phenomena. Beyond just ticket sales, it helped craft a narrative of Singapore as a premier entertainment hub, generating an influx of tourists, global media attention and social media buzz. That led to immediate economic benefits and lasting cultural capital of an outsized scale.

When countries can bring all the pieces together, they can transform their reputation for the long term. For example, through deliberate investment in its creative industries and strategic promotion of Korean culture, South Korea has achieved what decades of traditional diplomacy could not. K-pop, K-dramas, and Korean cuisine have become global touchpoints, translating into tangible economic benefits through tourism, exports and foreign investment. The key to success lies in understanding that cultural influence is not merely about promoting arts and entertainment; it is about creating a comprehensive

narrative that resonates with specific audience segments. When mid-sized and smaller countries do so in credible, creative ways, they can leverage natural advantages to greater impact.



Issue 4:

Cultural economics

Communications considerations:

The secret to the success stories in cultural economics and broader destination marketing is to marry audience insights with opportunities for differentiation. Countries around the world highlight “culture” as a defining trait and many leverage it for tourism, but few are able to use it for wider influence and impact.

UNCOVERING IMPACTFUL CULTURAL CUES

- When countries understand not just who they are talking to, but what motivates their target audiences, they can craft messages that resonate on a deeper level. This is not about broadcasting a generic message to the world; it's about creating targeted narratives that speak to specific influencers, decision-makers and communities.

MAKING CREDIBILITY PARAMOUNT

- The most sophisticated communication strategy will fail if it is not grounded in authentic cultural assets and genuine national achievements. Countries must choose platforms and partnerships that authentically match their aspirations. Don't steal from culture; lean into it to better understand and craft authentic narratives that bridge cultural offerings with audience desires.

STACKING CULTURAL NARRATIVES

- The beauty of cultural economics lies in its compound effect. Each successful interaction or experience builds upon previous ones, creating a virtuous cycle of influence that grows stronger over time. In a world where traditional power metrics are being redefined, the ability to shape perceptions through cultural engagement and strategic communications isn't just an option for mid-sized and smaller countries — it's an imperative.



Leveraging country reputation drivers

Country reputation must be continually built and earned. Understanding and leveraging the factors that shape reputation can provide a powerful advantage.



Country reputation drivers

Four drivers are central to crafting an effective country reputation. Leveraging these factors can help a country achieve greater impact.

In our study, we identified four categories of drivers of country reputation. In a complex and competitive world, these formal and informal factors are the areas of importance to audiences. Using them to their maximum potential can help a country advance its agenda and protect its interests.

Successful communications addressing all four areas has tremendous potential, particularly for mid-sized and smaller countries. It could help attract greater inward investment that accelerates new industries. Or secure vital progress on climate action or humanitarian support. Or advance diplomatic and defense priorities that strengthen alliances and increase security. Or create new opportunities for travel, tourism, and cultural and public diplomacy that connect a country's people to the world.



ATTRIBUTES

Capabilities and areas of expertise in which a country leads, stands out or contributes in meaningful ways, both domestically and internationally.



CHARACTER

Character traits of a country that help to build meaningful and influential connections with its stakeholders, including through the tone and feeling that a country conveys.



LEADERSHIP

Visible and subtle approaches a country's leader or leaders use to define their priorities, build support for their agenda and create collaboration.



COMMUNICATIONS

Effective and impactful use of communications channels, stakeholder engagement platforms, global and regional forums, and other methods to reach audiences.

Driver 1: Attributes

Highly Important Attributes for Country Reputation

92%



Diplomatic practices and engagement with other countries

89%



Economic growth and job creation

88%



Ethical, democratic and inclusive behavior of leaders

82%



Human rights and equality record

A country's strongest attributes — its areas of expertise, strength and success — are central to shaping how it has impact around the world and achieves its agenda.

Amid the many challenges facing the world's countries, several attributes are clearly considered the most important at shaping reputation according to informed audiences. These areas of expertise and focus enable it to lead or contribute in meaningful ways domestically and internationally.

Ranking as highly important are a country's diplomatic practices and engagement with other countries (92%), its record of economic growth and job creation (89%), the ethical, democratic and inclusive behavior of its leaders (88%), and its human rights and equality record (87%).

Just behind are technological innovation, including experimenting with new technologies and supporting entrepreneurs (82%).

When looking to reach American and British audiences to build reputation, incorporating messages about these attributes may help to gain advantage.

There is notable divergence between the UK and United States in two other key areas. First, 84% of British audiences rank climate and sustainability as a highly important factor, while only 67% of Americans do, likely reflecting Britain's push toward renewable energy and green industry in contrast with the ongoing backlash toward climate action and ESG in the United States. Second, British audiences see a country's cultural exports, such as music, film, art and fashion, as significantly more influential than American audiences, with 80% compared to 65% ranking it very highly.

Despite the assumption that American and British audiences are aligned or similar, countries must heed this as a warning. Targeting messages carefully the right way — and avoiding messages that could be ineffective at best but counterproductive at worst — becomes more essential.

Driver 2: Character

The character traits conveyed by a country are fundamental to how audiences perceive and engage with it. Using communications to make them more prominent can help shape success on the international stage by building trust and affinity with a country.

While a country's capabilities or attributes are important, its character and personality are central to building reputation around the world. The "feeling" that a country provides — good or bad — often shapes wider impressions that can impact upon trusted relationships, opportunities for collaboration and the ability to lead.

While these factors may feel formed by instinct and gut feel, our survey assessed more than a dozen personality traits — from welcoming and friendly people (which scored top overall as an individual character trait), to fair, just and equitable, to innovative, tech-focused society, to modest and pragmatic mindset. We then clustered them into categories and ranked them to define the personality factors that can be emphasized or leveraged to build stronger perceptions.

While there is broad alignment, there are a few notable differences between the UK and United States. For example, UK respondents felt an innovative, tech-focused society most positively impacts perceptions more strongly than U.S. respondents (32% to 19%).

PRIMARY TRAITS:

- **Social inclusion and equality:** Traits that most positively impact perceptions (88% important) are related to equity, fairness and inclusion, including a just and equitable society, safety for historically marginalized communities, equality of economic opportunity and cultural inclusivity.
- **Quality of life and family support:** Ranking second (84% important) are attributes related to quality of life, such as a strong social and lifestyle offering, support for families, and an emphasis on public health and healthy lifestyles.

SECONDARY TRAITS:

- **Mindset and values:** Ranking third (67% important) are topics related to a country's mindset and values, such as a modest and pragmatic mindset and friendly, welcoming people, which ranks top overall.
- **Environmental commitment:** Ranking fourth (44% important) are traits focused on environmental actions and behaviors, such as commitment to tackling climate change, a focus on sustainability and efforts to be a greener society.
- **Innovation and creativity:** Ranking fifth (40% important) are personality aspects related to forward-looking technology and creative thinking, such as being an innovative, tech-focused society and fostering a creative environment that supports new thinking.



Driver 3: Leadership

The visibility of a country's leaders — and their ability to communicate clearly and passionately about issues of importance to their audiences — has proven vital to creating outsized impact. But as long-standing alliances and bilateral relationships fragment and fracture, attuned to sensitivities across countries will be essential.

Factors related to countries' leaders and leadership positioning are a defining element of their reputation and are particularly essential for mid-sized and smaller countries to achieve a global presence. These elements are often the differentiators that help a country stand out from competitors and create greater influence with international audiences.

When asked to identify countries that have an outsized impact relative to their size, the most prominent responses relate to leadership capabilities. Visible leadership on the world stage (58%), effective management of crises (55%), demonstrated action on important issues (51%), and the ability to communicate clearly and persuasively (50%) were all ranked in the top five factors by more than 50% of informed audiences.

There are notable divergences between the UK and United States. Americans are more likely to highly rank visible leadership (15% gap), effective crisis management (13% gap), and clear and persuasive communications (17% gap) as important drivers.

British audiences see areas like vocal and passionate leadership (10% gap) and a sense of new thinking (14% gap) as more important, likely reflecting a period of leaders seen as disengaged or disconnected from the public's interests and the wider anti-incumbent spirit of change.

Countries will need to be mindful of the different tones and attitudes across the Atlantic when reaching target audiences. Particularly when engaging in international forums or with international media, the tone and approach to leadership may be received differently.

Driver 4: Communications

The communications landscape has fundamentally changed — but when shaping countries' reputation, traditional media sources are still important and trusted. Countries should craft communications to balance these long-standing sources with new or emerging channels that may approach stories with different perspectives.

Skillful use of communications sits at the heart of perceptions of countries, both through formal channels and informal vehicles like public diplomacy, cultural exports and more. But despite some skepticism about positive news about countries, particularly among British audiences, and the fragmentation of information sources in the social media era, established media channels remain highly influential when shaping country reputation.

According to respondents, traditional media outlets remain surprisingly impactful. When asked which sources of media affect how they perceive different countries, informed audiences cited a range of major media categories as significant and important. This includes broadcast news (e.g., CNN, BBC, CNBC, Fox News, Sky News) at 61%, daily newspapers (e.g., The New York Times, Wall Street Journal, The Guardian, The Times) at 51%, and politics- and business-focused news (e.g., Politico, Bloomberg, Reuters, Financial Times, Economist) at 50%.

While influential on other issues, consumer-focused media (e.g., USA Today, Daily Mail, The Daily Mirror), social channels like X, Facebook and TikTok, and online media (e.g., Fast Company, Semafor, UnHerd, Business Insider) all ranked lower.

The divide in trust in media sources between the UK and United States is apparent. Across a number of media types, British-informed audiences are 10%-20% more likely to say a media channel or platform influences perceptions a great deal than Americans. This is particularly true for politics- and business-focused media, consumer-focused media, social media platforms like X, Instagram and TikTok, documentaries and fictional television shows.



Taking action to create impact

The opportunity for greater impact is clear, and the path is clear — if countries can define their differentiators and harness the power of innovative, agile communications.

Seizing the opportunity

Defining what makes a country unique and relevant in a crowded landscape is hard. Communicating those differentiators so they help achieve a country's agenda, as competitors vie for attention and deposition their rivals, is even harder. Success depends upon finding new solutions that build and protect country reputation.

No country is doing it perfectly, but there is great potential for many to do it better. Through creative storytelling, backed by evidence and examples, countries can use communications campaigns to help foster the economic growth, geopolitical stability, and societal impact that will positively benefit their people and the world. Our expertise is in partnering with countries to do so.

Seizing the opportunity depends upon the following:

LEVERAGE THE FOUR DRIVERS TO DEFINE POSITIONING

- The opportunity for outsized impact is shaped by how a country leverages the four drivers of country reputation to optimal effect. They provide the roadmap to develop genuinely meaningful, engaging and differentiating positioning that makes a country stand out — and for mid-sized and smaller countries, to punch above their weight class.

LEAD WITH INTENT

- Our informed audiences expect countries to demonstrate a point of view on the issues that matter. The contentious state of the world requires it. This means shaping your country's agenda, defining its leadership role, and building progress toward that agenda with intent. Ideally, it combines how your country thinks, acts and enables others to be part of success.

KNOW YOUR COUNTRY'S AUDIENCES

- Data and insights on target audiences are essential, yet many countries lack a clear grasp on what their target audiences want and expect. Our study offers the foundation, but going deeper with analytics and research to understand how to tailor your country's positioning on specific issues will help messages and engagement opportunities resonate far better.

USE THE FULL POWER OF COMMUNICATIONS

- Bringing together the full range of communications tools and capabilities to do so is both art and science. It requires agility and creativity, understanding which levers to use to maximum impact. Traditional media remains highly influential with informed audiences and offers credibility and reach, while social platforms, owned web content, speaker platforms and summits, and direct engagement all combine to create a surround-sound effect.

Creating advantage through communications

Now is the moment for mid-sized and smaller countries to step forward and sharpen communications. The opportunity to create advantage is open, and the necessity is clear.

With global tensions escalating and more pressure being applied to mid-sized and smaller countries, their need for maximum impact is urgent. While a few years ago, the rise of middle powers and small countries was an opportunity, the landscape now requires managing risk and protecting reputation.

As shown in our study, now is the moment for mid-sized and smaller countries to step forward — including by coming together more closely.

While they may be more vulnerable to major shocks or targeted coercion, these countries have potential to create strategic autonomy. Used to their advantage, it will allow them to set and achieve their own agenda.

The areas of opportunity are wide-ranging. Countries can promote unique economic specialisms to drive targeted growth. As active champions of international law and diplomacy, they can band together to shape the international landscape. By pooling resources, they can protect collective security interests. And they can use their agility and nimbleness to accelerate innovation in government and public-private collaboration.

Effective communications around the world — leveraging a presence in key political and business capitals, establishing a profile at major forums and within smaller stakeholder circles, building visibility in media, shaping and owning online discussion — is the pathway to success that we can create together.





The agency partner for you

FleishmanHillard brings together expertise in country reputation, sector knowledge and the full suite of communications capabilities. As advisers and partners in implementation to governments, our campaigns deliver impact.

FleishmanHillard International Affairs

FleishmanHillard International Affairs brings together the communications capabilities and expertise to help organizations navigate a complex world — and to build support for and amplify their efforts to have a positive impact in this world.

Our International Affairs practice works at the intersection of the issues defining the world: geopolitics, trade and investment, humanitarian challenges, climate and sustainability, technology and innovation, and more. We partner with foreign governments, agencies, multinational businesses, philanthropies and trade associations, helping them address complex issues and achieve outsized impact with their audiences.

Our experience focuses on ongoing engagement to shape the landscape and deliver powerful communications programs. Our team has helped countries secure inward investment and boost their position as hubs for global trade, advocated for climate action and advanced the renewable energy transition, launched new technology platforms and initiatives, tackled diplomatic disputes and sanctions, and more.

We also partner with clients around the world's largest forums and events. From the World Economic Forum's Annual Meeting at Davos, to COP Summits, to UN General Assembly, to gatherings established by our clients, we set the communications strategy, shape media and stakeholder outreach, and facilitate on-the-ground engagement.

Our approach is backed up by data and evidence, using FleishmanHillard's proprietary data tool stack to understand audiences and target them effectively. These same tools allow us to measure results and impact, proving the return on investment for government investment in our work.

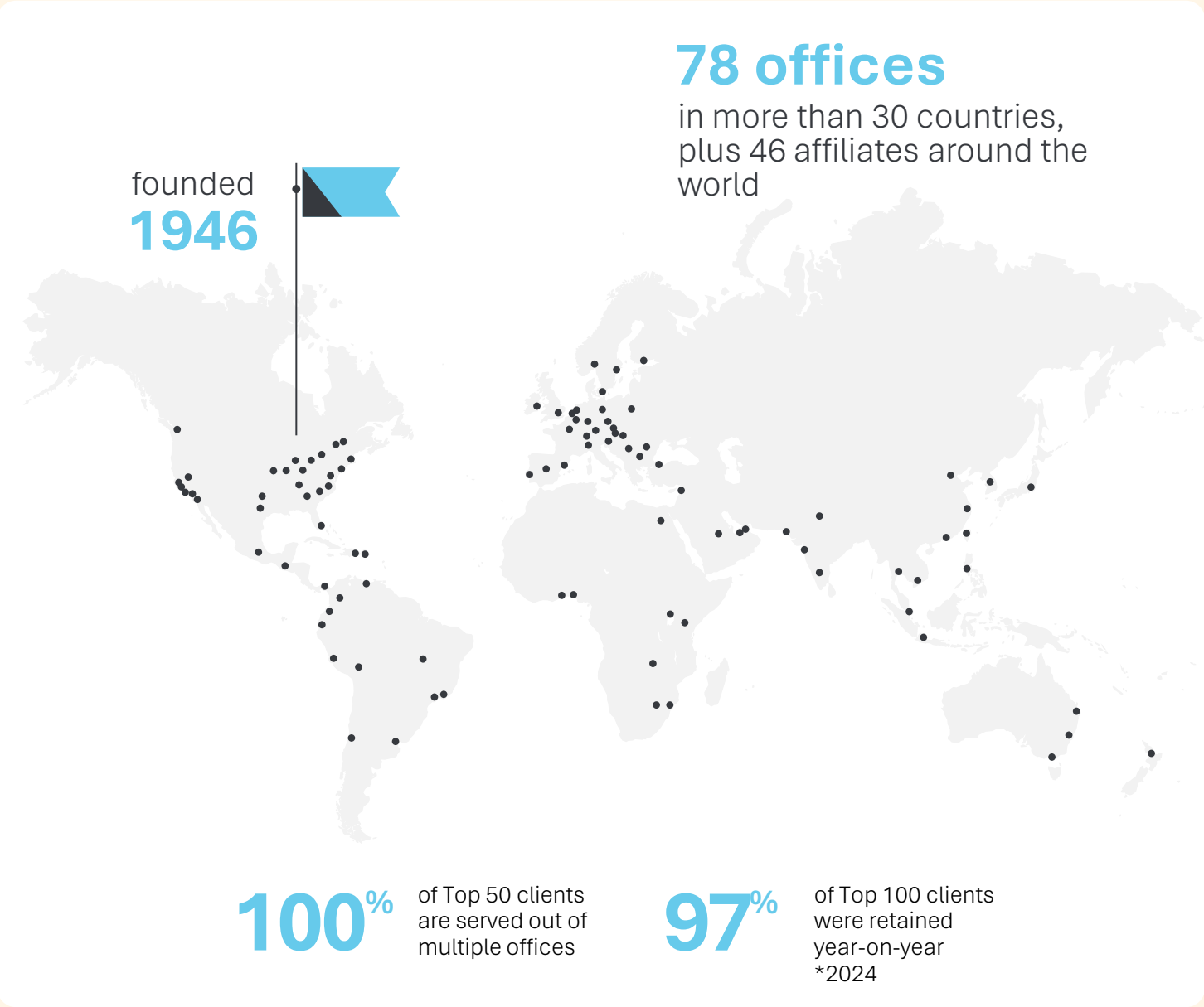
Our Core Capabilities

- **Strategy and positioning:** Developing compelling strategies and creative platforms to solve challenges and secure opportunities through communications.
- **Narratives and storytelling:** Shaping the messaging and positioning to have impact with target audiences on nuanced international issues.
- **Media engagement:** Leading media relations campaigns that generate results, from proactive, breakthrough coverage to managing media scrutiny.
- **Stakeholder outreach:** Creating and leveraging relationships and partnerships with business, political and societal stakeholders through events, collaborations and other forums.
- **Public affairs:** Shaping the policy and regulatory landscape to support diplomatic, economic or societal objectives, from direct engagement with leaders to concentric circles of influence.
- **Digital engagement:** Using the full range of digital and social channels, including owned, organic and paid, to reach audiences and compel action, from mass audience to highly targeted senior decision-makers.

Global reach, Local expertise

Our global network of 78 FleishmanHillard offices and countless affiliates means we are where you need to be. This includes FleishmanHillard offices in the key markets that shape political, business, and societal dynamics and trends, across large, mid-sized and smaller countries. The result is a deep understanding of local audiences and their connectivity to global trends.

More than operating as individual dots on a map, our teams work together every day to deliver communications programs. We mobilize quickly and know how to translate global strategies and messages into media relations, stakeholder outreach, and digital and social engagement that is consistent and aligned.





Contact us

FLEISHMANHILLARD INTERNATIONAL AFFAIRS

internationalaffairs@fleishman.com

www.fleishmanhillard.com