



Global Influence & Impact Research

BBC & Tapestry Research

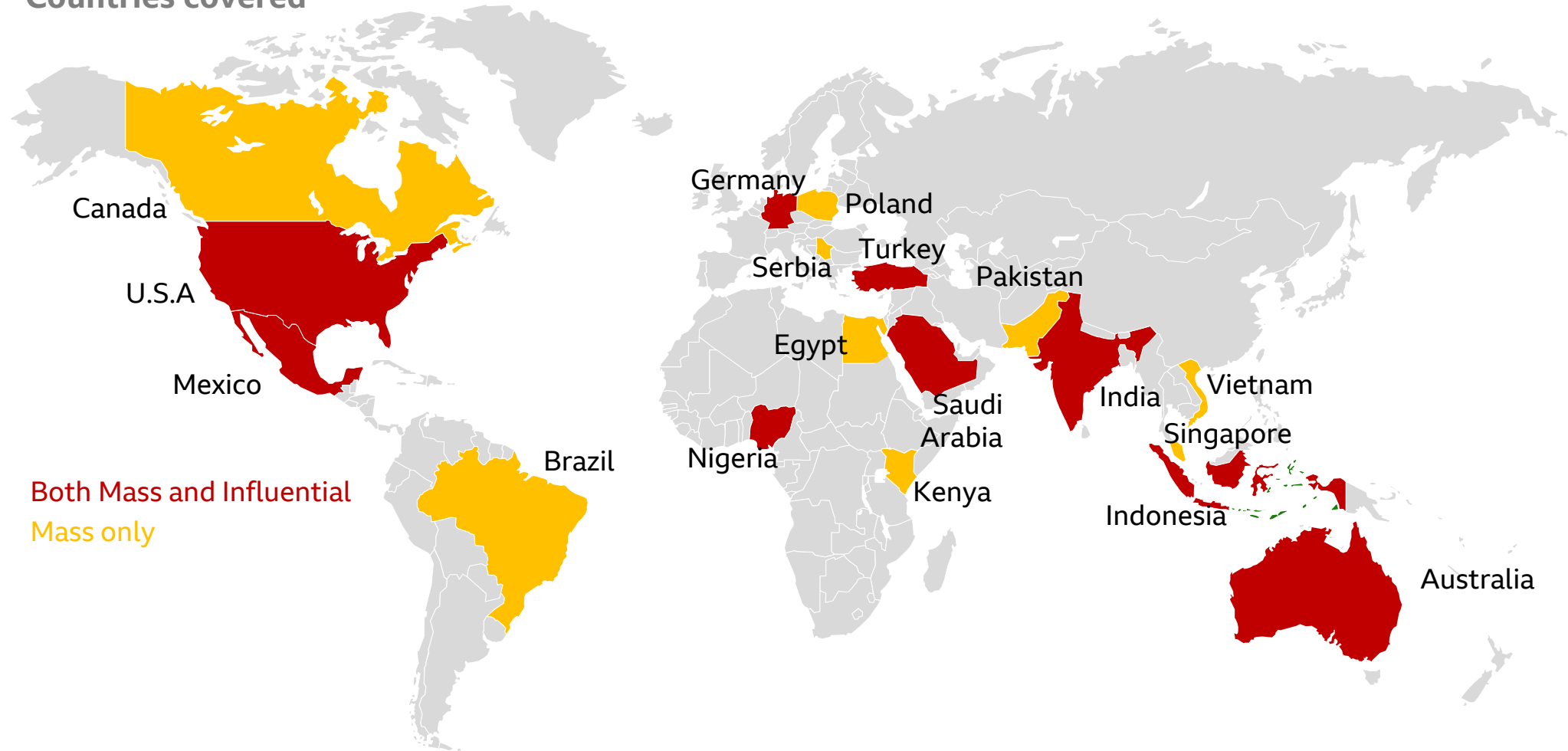


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BBC Global Influence & Impact research: methodology

Aim: Understand the 'influence' of the BBC in both **UK value terms** (i.e. How does the BBC influence liberal democratic/British values) and alignment with the **UK's wider objectives** (e.g. favourability towards the UK) across both the '**Mass Audience**' and '**influentials**'

Countries covered



Methodology overview: Study of both the Influentials and Mass

Method & Sample

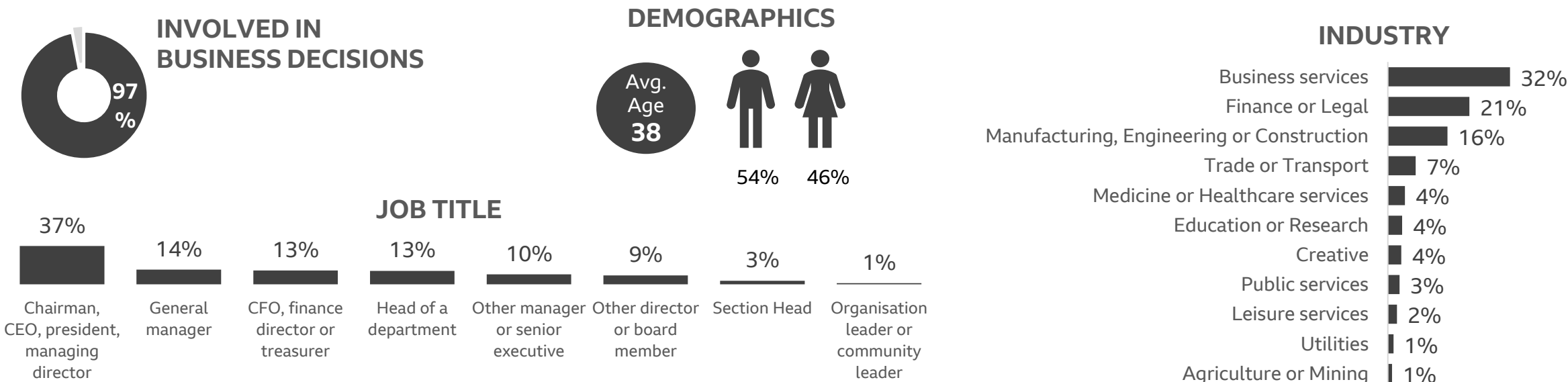
Two parallel online quantitative studies: 23k sample across 18 countries assessing both the ‘Mass’ Audience and ‘Influential Audience’.

- Data Collection: 7th Jan – 4th Feb 2025 through online panels.
- Research Agency: Tapestry Research
- Study previously carried out in June 2021 using same sample specifications. Comparisons over time report like-for-like market coverage only*.

Mass sample: 19,899 adults across 18 countries (at least 1000 per country); aiming to represent either the total population or the online population of the country. Sample representative of age, gender and education levels of each country.

Influential sample: 3,012 across 10 countries (at least 300 per country).

Influential sample:



1. Changing tides

1.a. Ordinary perspectives on a changing world



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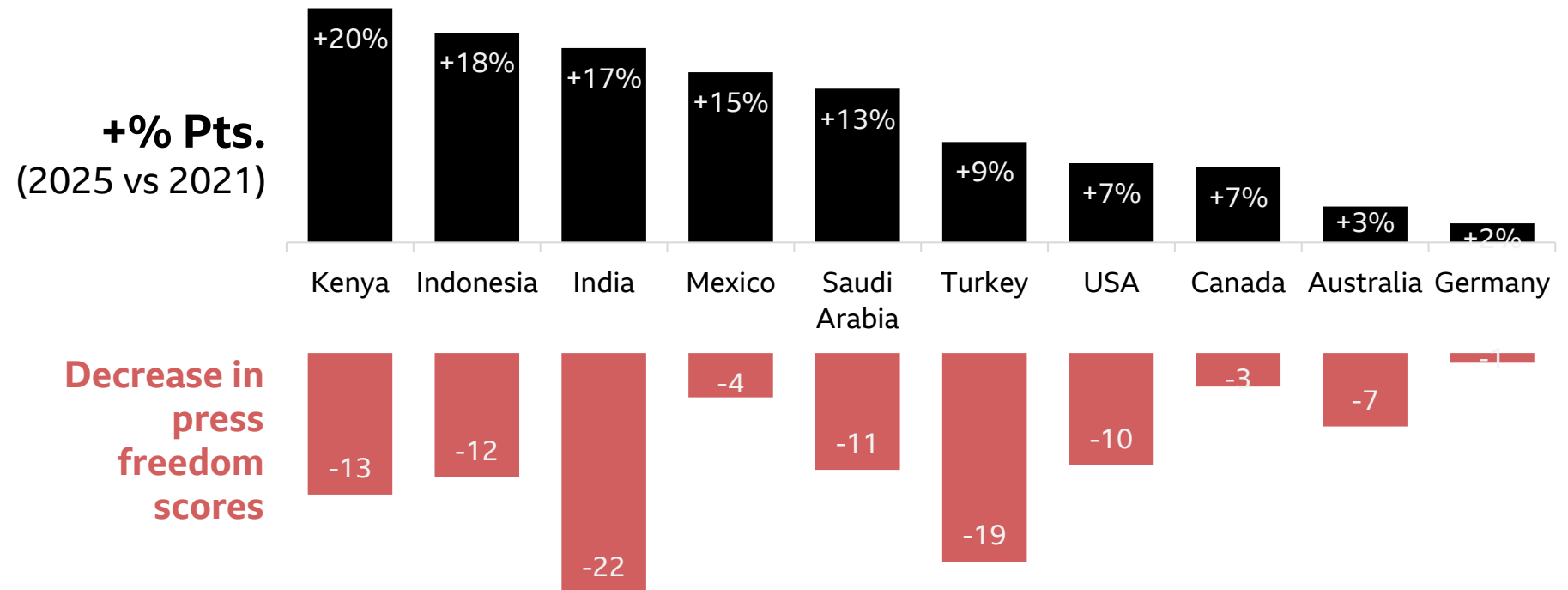
Since 2021, people are increasingly demanding a free media

But press freedom has been in retreat globally

Media Freedom: “The media in our country should be free to report on anything they want without restrictions”

[Net change in percentage points]

Among mass audience



Since 2021
149 countries
have declined in
press freedom
scores*

There has been an increase in support for human rights, particularly in the Global South

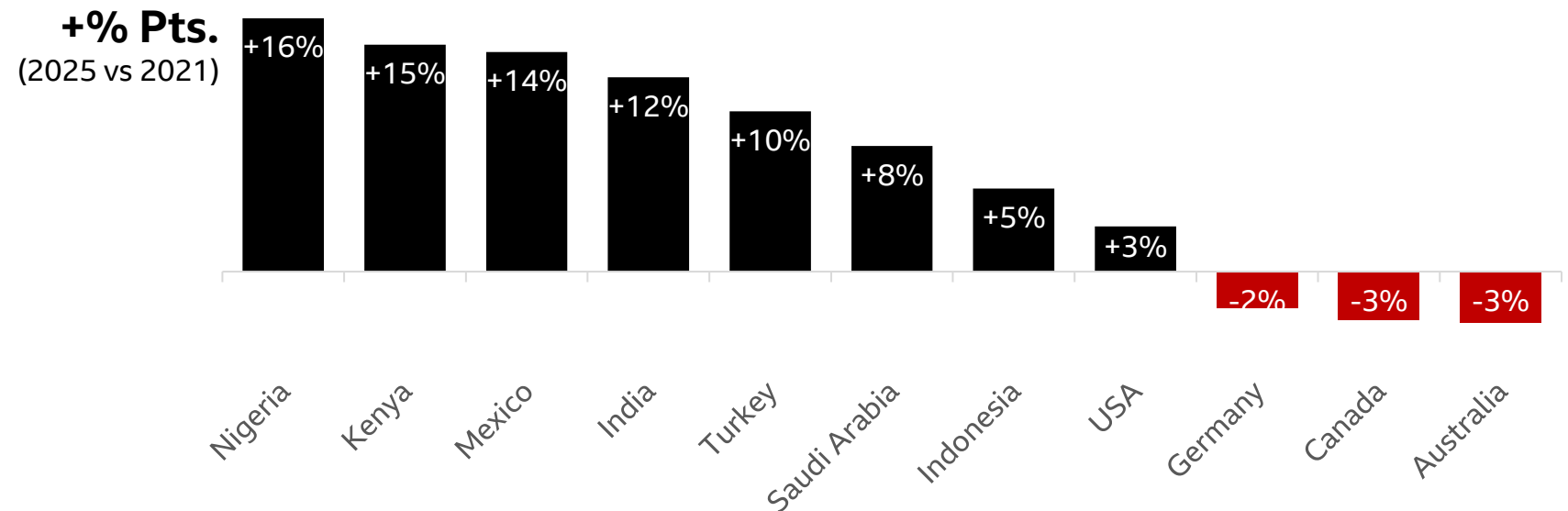
Human rights: “Human rights should be universally respected and apply equally to everyone in our country”

[Net change in percentage points]

Among mass audience

“The past year was marked by armed conflicts and humanitarian crises, exposing the fraying of international norms meant to protect civilians and the devastating human cost when they are flouted.”

**Human Rights Watch
2025**

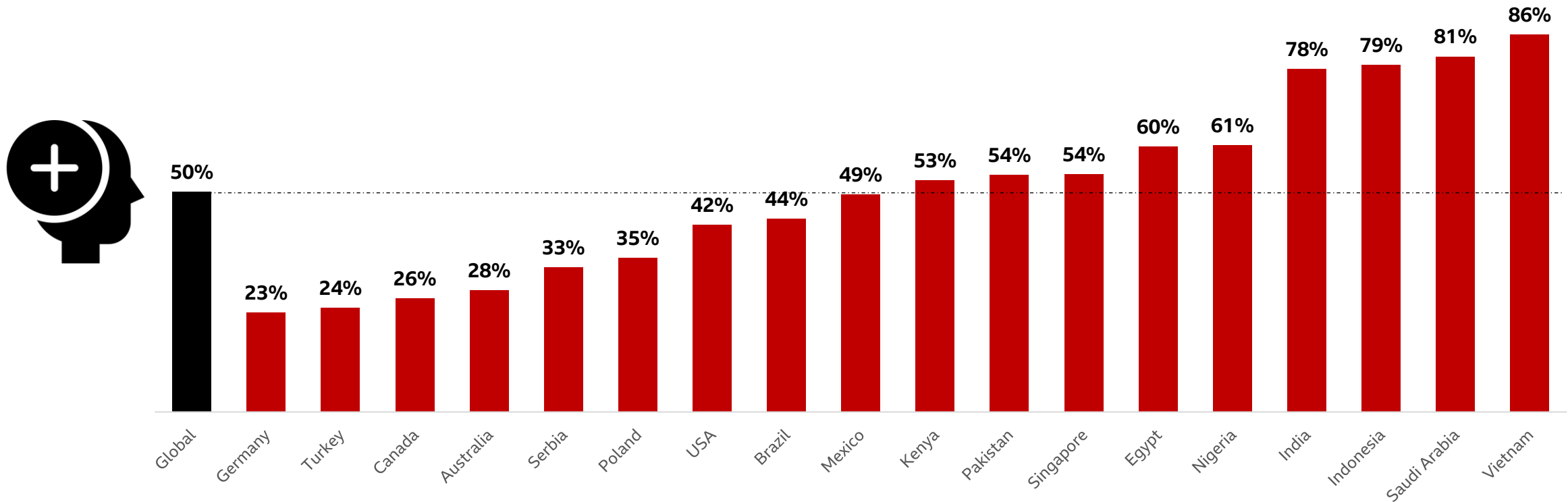


The Global South has a more positive vision of the future

Western democracies feel more negatively, or are uncertain

Agree childrens future will be better off than their parents

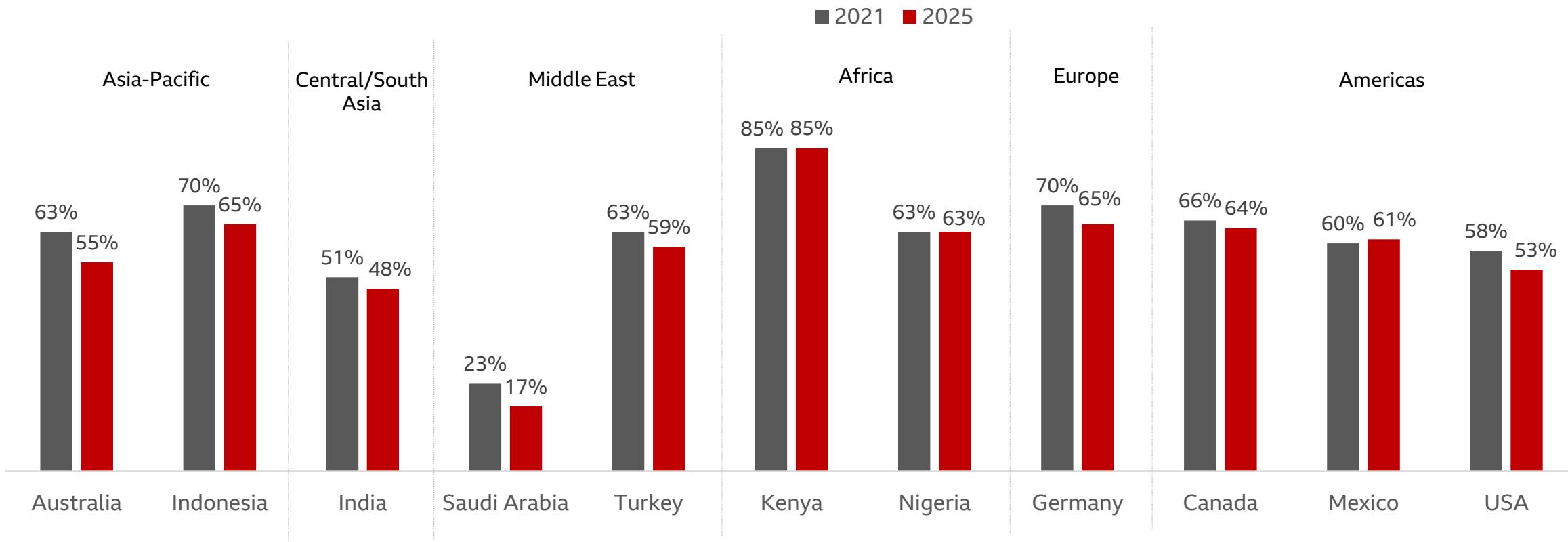
Among mass audience



The preference for democracy has fallen the most in Asia and the Middle East

Preference for Democracy

Among mass audience – 2021, 2025



Cost of living, corruption and crime are the top perceived challenges

Issues that pose major challenge to your country and its people

Among Mass Audience



40%

Cost of living/ poverty



29%

Corruption



21%

Crime & violence



21%

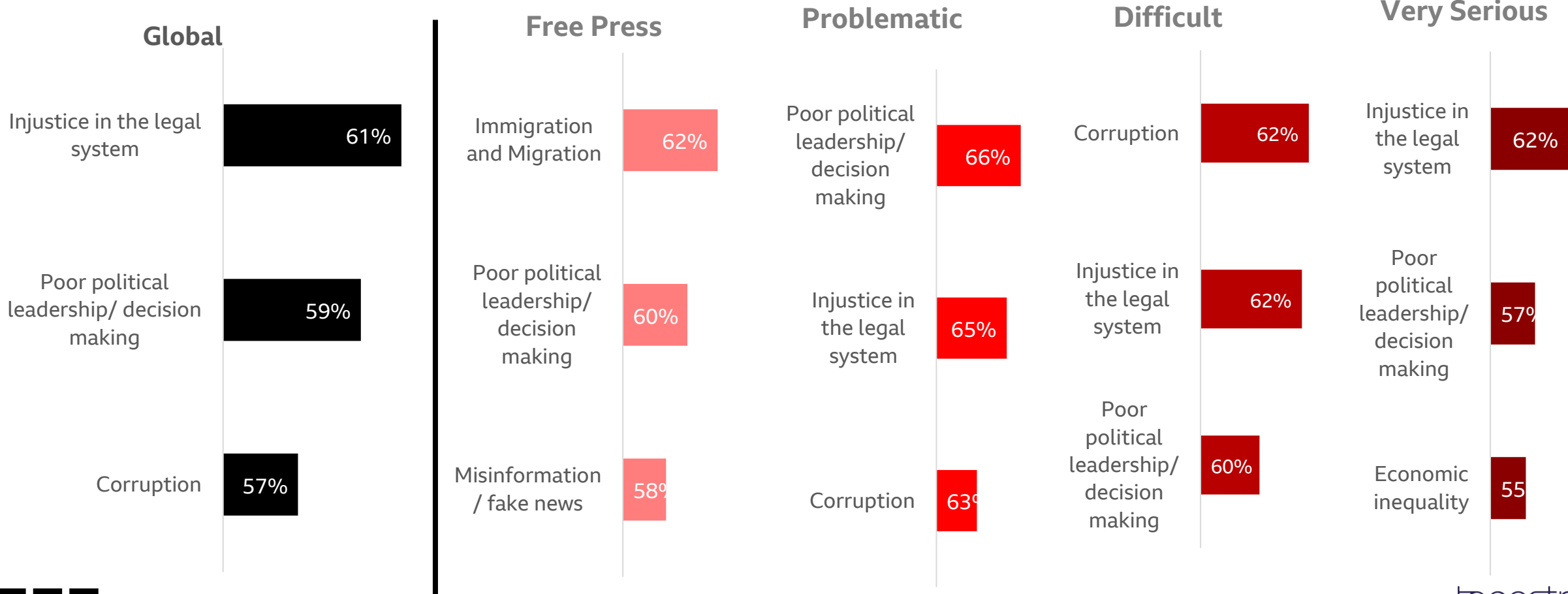
Lack of
employment
opportunities

There is dissatisfaction with the ‘watchdog’ function of local news media

Gap in holding power to account, particularly in countries with low press freedom

Dissatisfaction of media in reporting on challenges facing your country

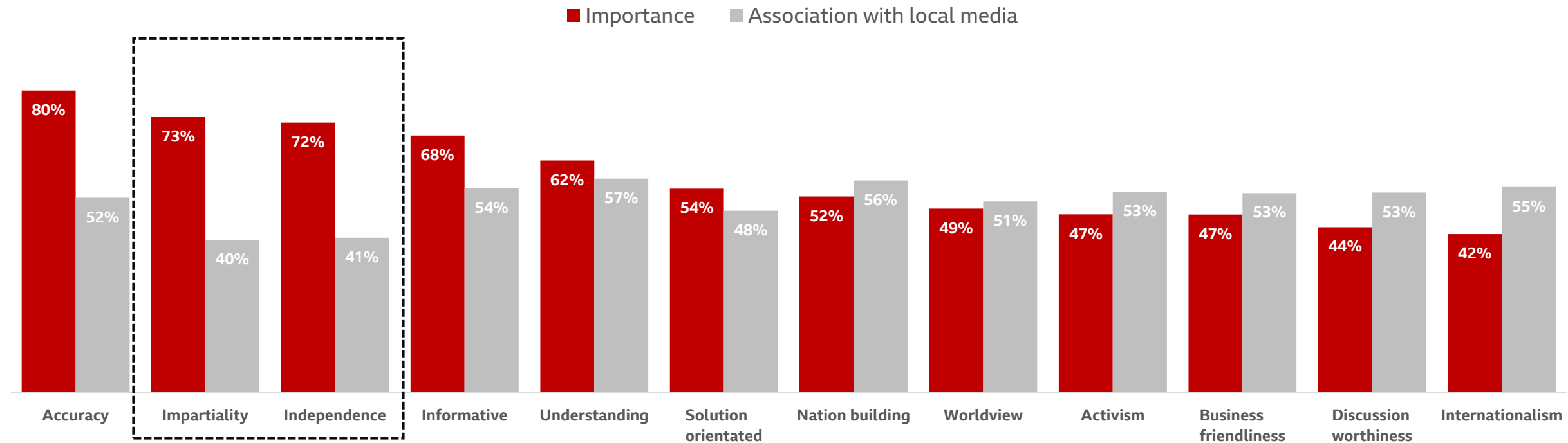
Reported among **mass audience** & across **press freedom** country classification



Independence and impartiality are among the most important items for news users, but are the least associated with local news providers

Most important items for regular consumption of a news provider, and association of items with local news providers

Among Mass Audience – all countries



1. Changing tides

1.b Beyond the West: The World's Changing Priorities



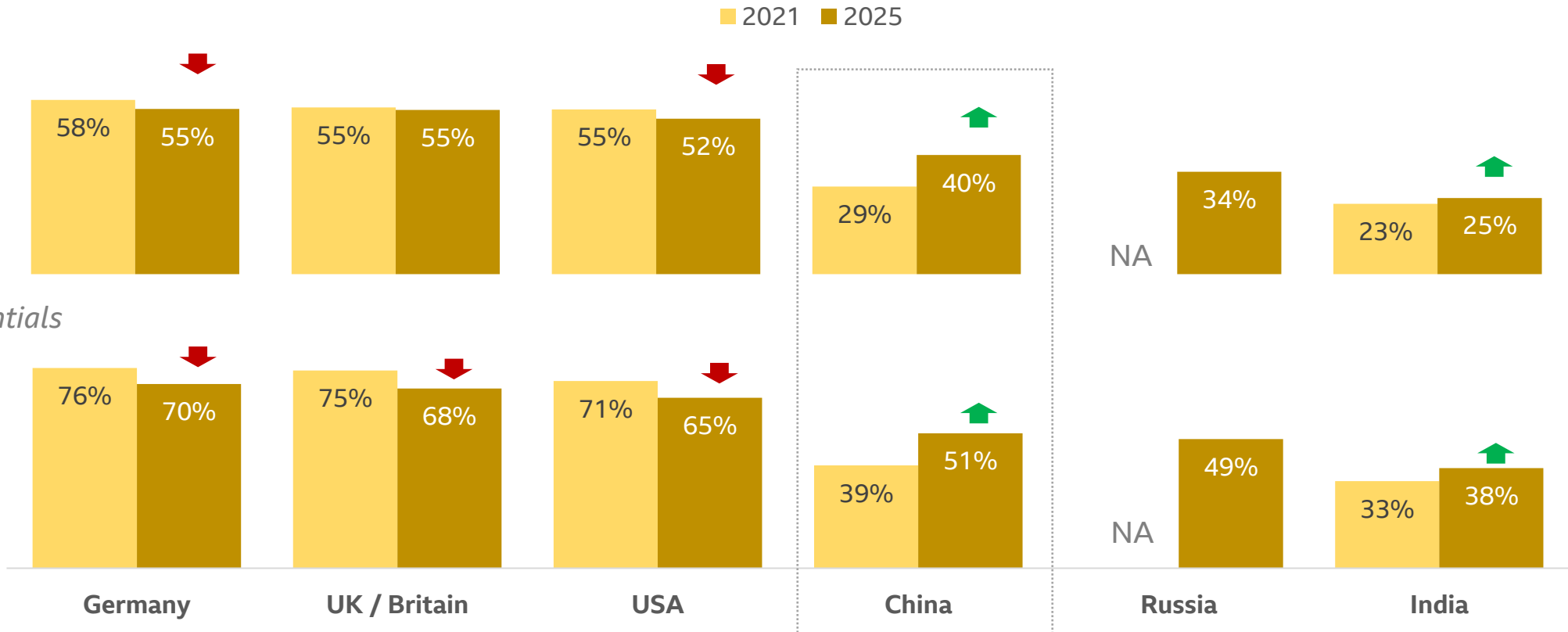
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Western countries are viewed less favourably than 4 years ago

China shows a considerable increase in favourability

Country Favourability [Net Favourable]

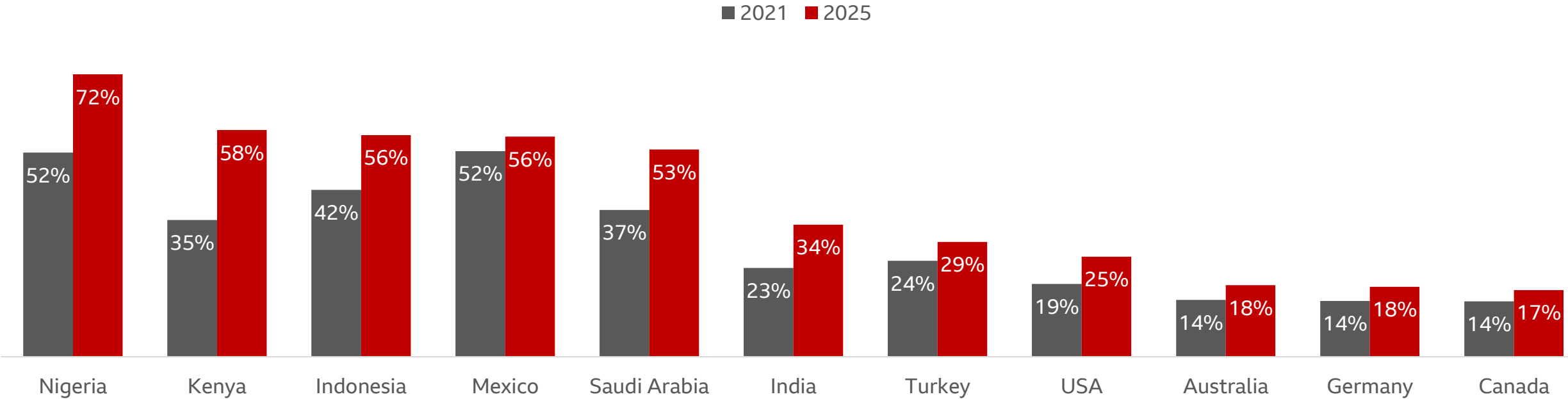
Among Mass



The increase in China's favourability comes from outside of Western markets

Country Favourability [Net Favourable] - China

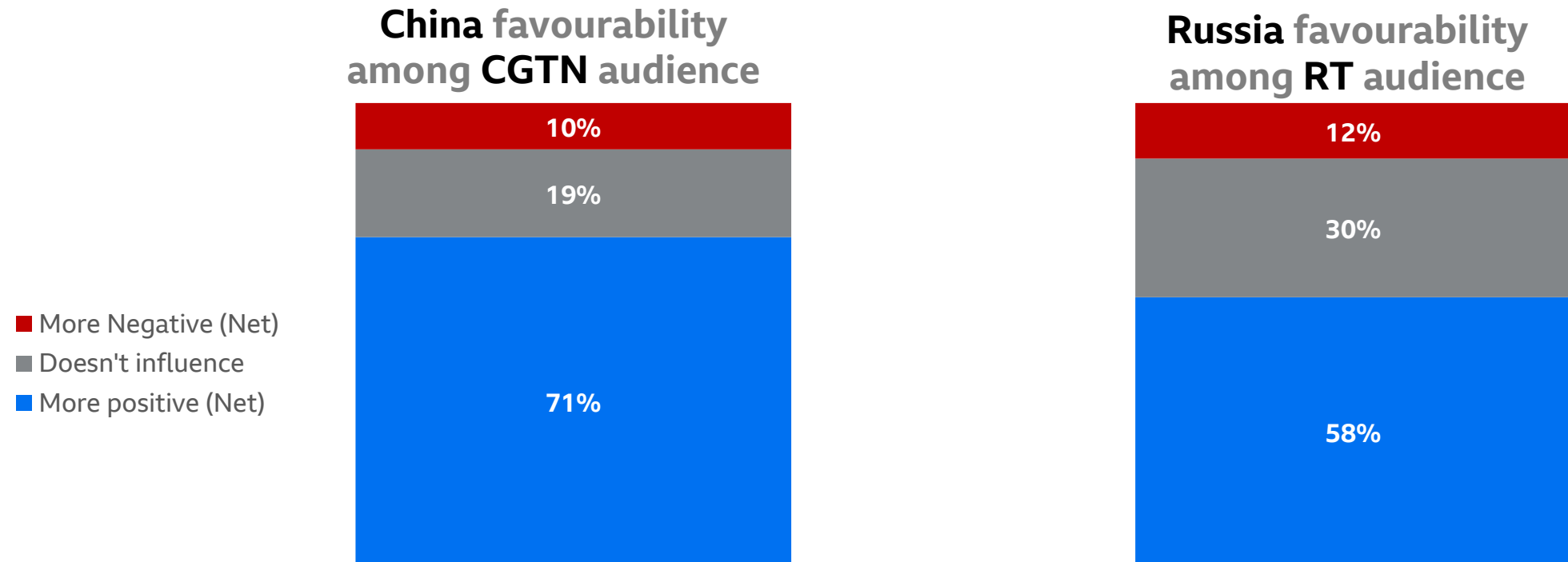
Among Mass Audience



Consuming CGTN and RT has a direct influence on favourability towards China and Russia

How does consuming CGTN / RT influence your attitudes towards the China / Russia?

Among Mass CGTN and RT users

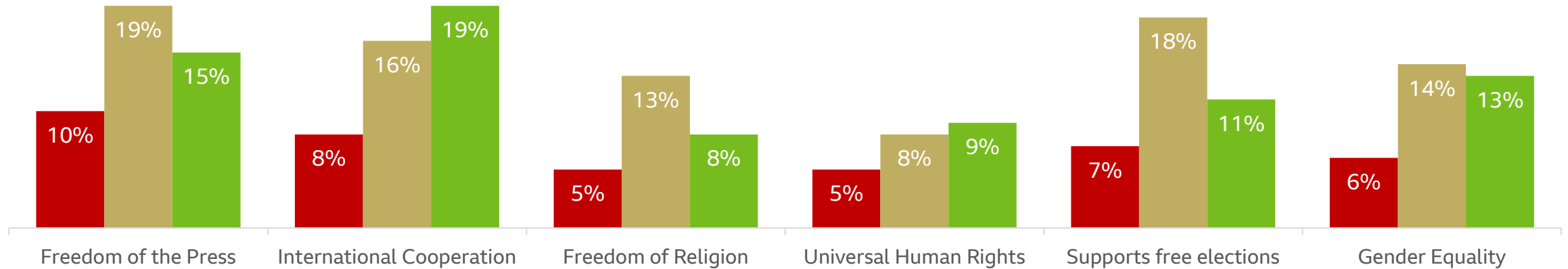


CGTN and RT users are more likely to hold non-democratic views

How strongly do you disagree with the following statements?
(Net disagree)

Mass Audiences

■ BBC ■ CGTN/ CRI (& not BBC) ■ RT (& not BBC)



2. BBC as a counterweight

2.a BBC's role & social values

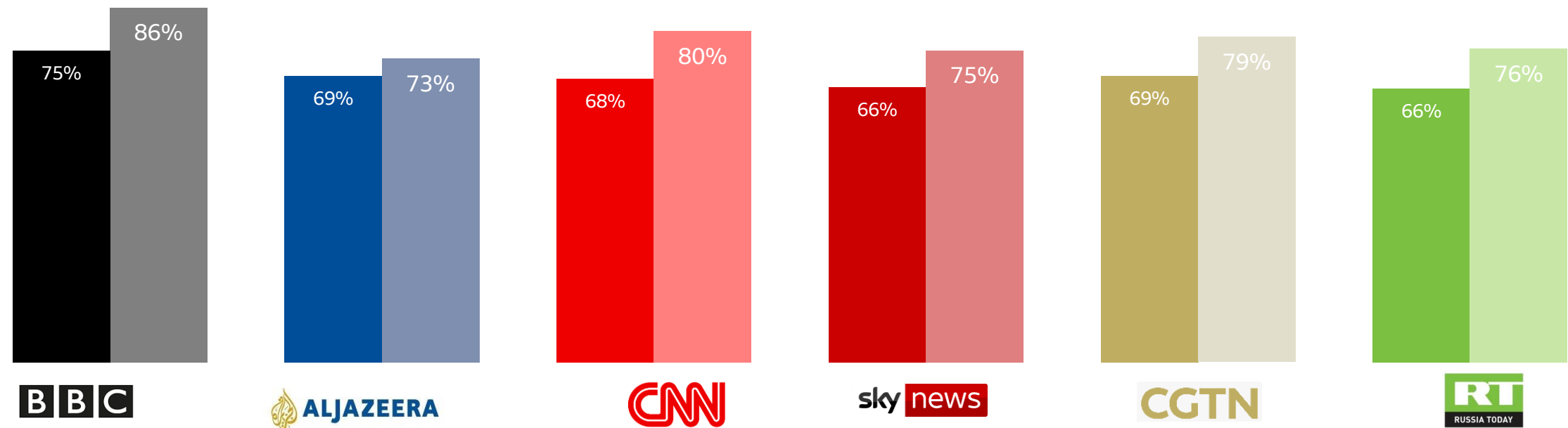


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BBC is the most trusted international news brand among the mass and influential audience.

Trust in International News Providers

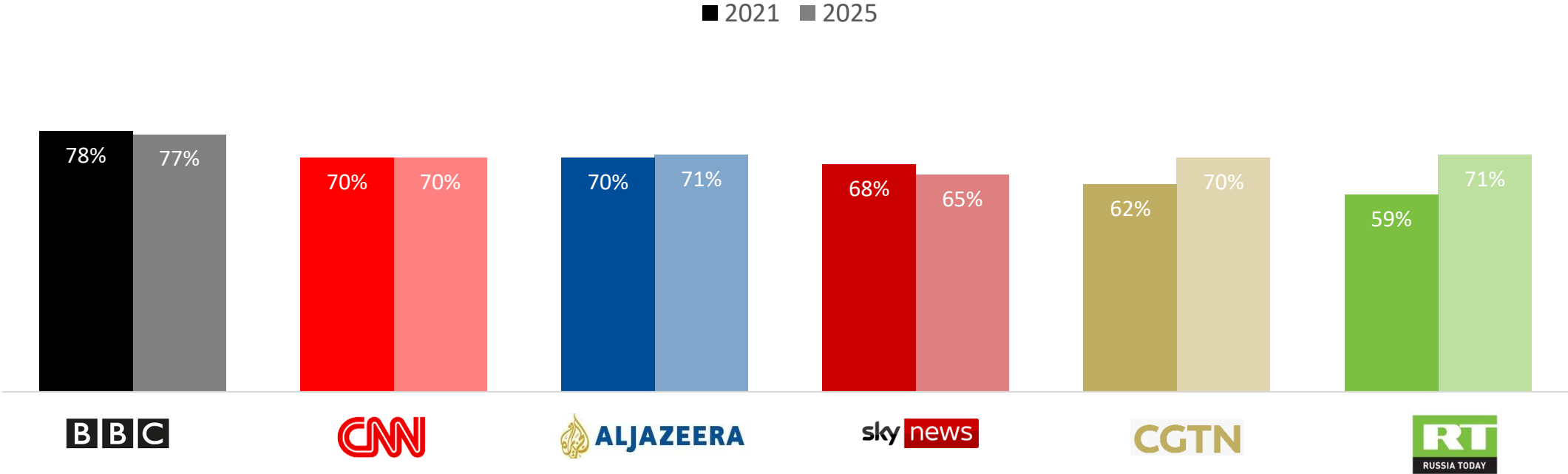
Among Mass Audience | Influential users of each brand



Among Mass Audience, BBC trust hasn't changed since 2021, whereas trust in CGTN and RT has increased

Trust in International News Providers

Mass Audience (among users of each brand)

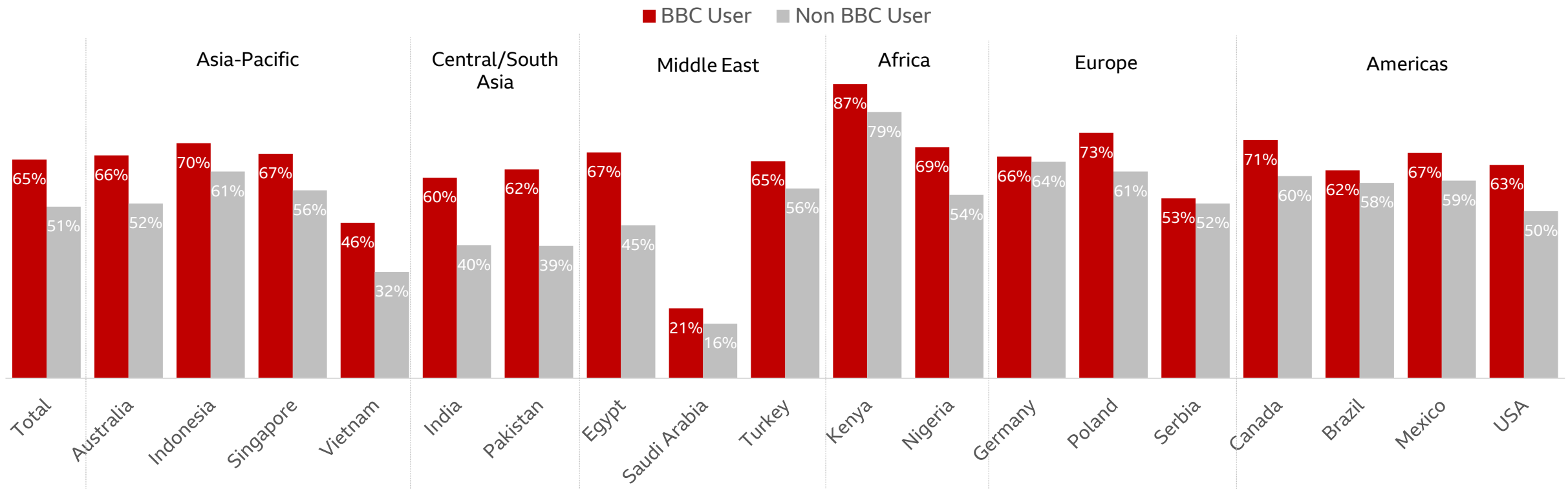


BBC users show a greater preference for democracy than non-users in all markets

The difference is most pronounced in authoritarian regimes

Preference for democracy (representative and direct democracies)

Among Mass Audience

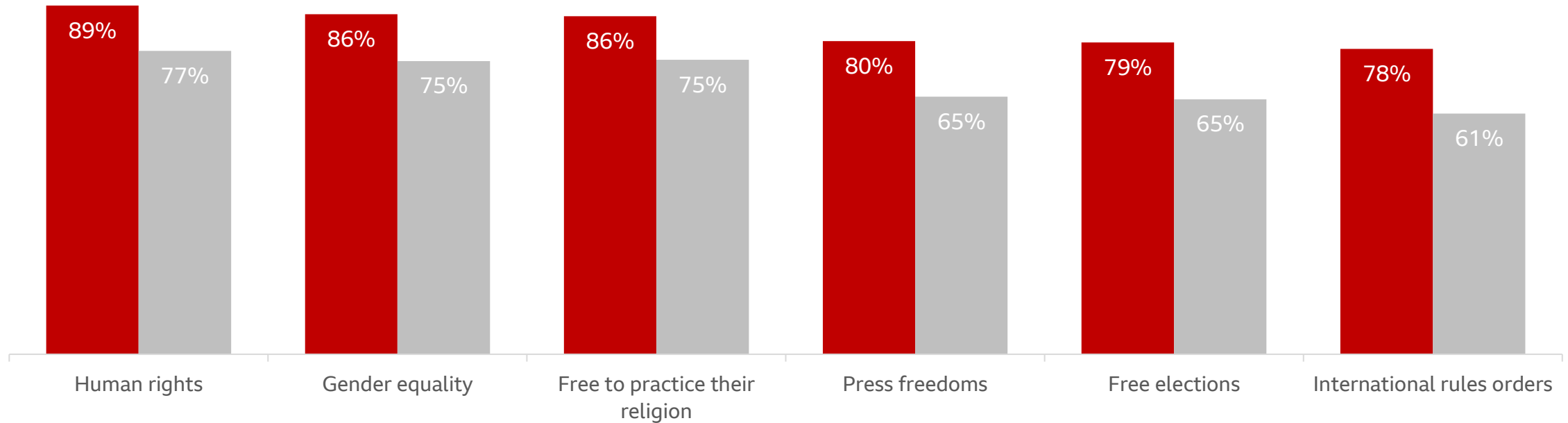


Across the board, BBC users believe in democratic values significantly more than non-users

How strongly do you agree or disagree with the following?
(Agree or Strongly Agree)

Among Mass Audience

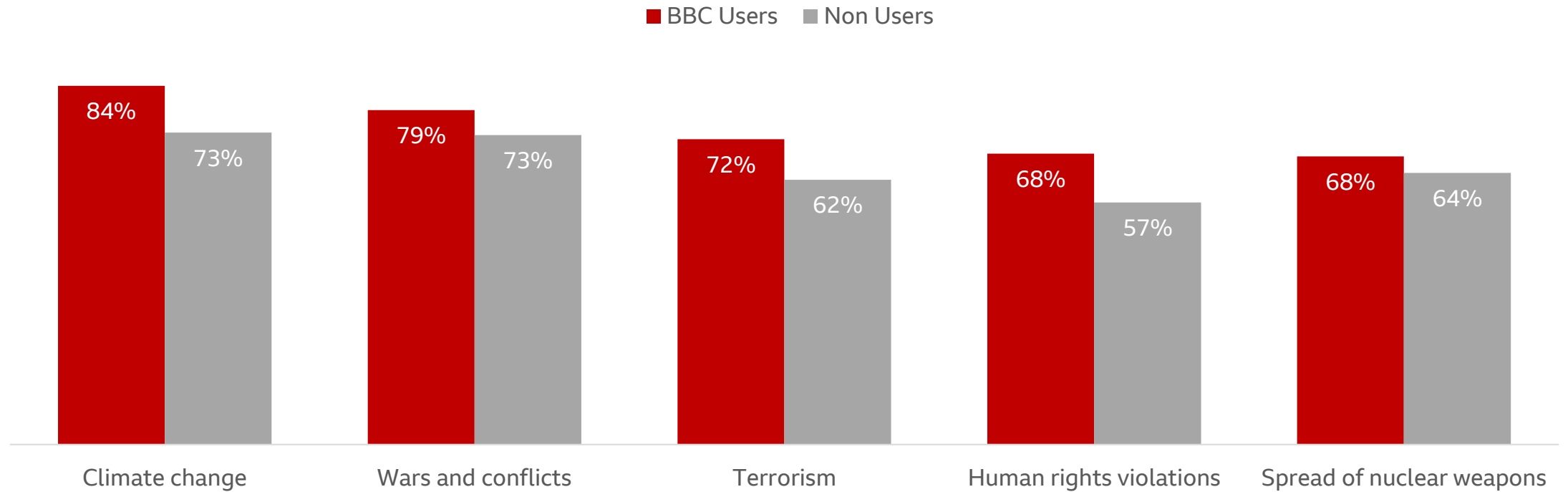
■ BBC user ■ Non user



BBC users are more likely to favour international cooperation to address biggest challenges

Top 5 global challenges facing countries – and % who think they require international cooperation

Among Mass Audience



2. BBC as a counterweight

2.a BBC's role & UK growth

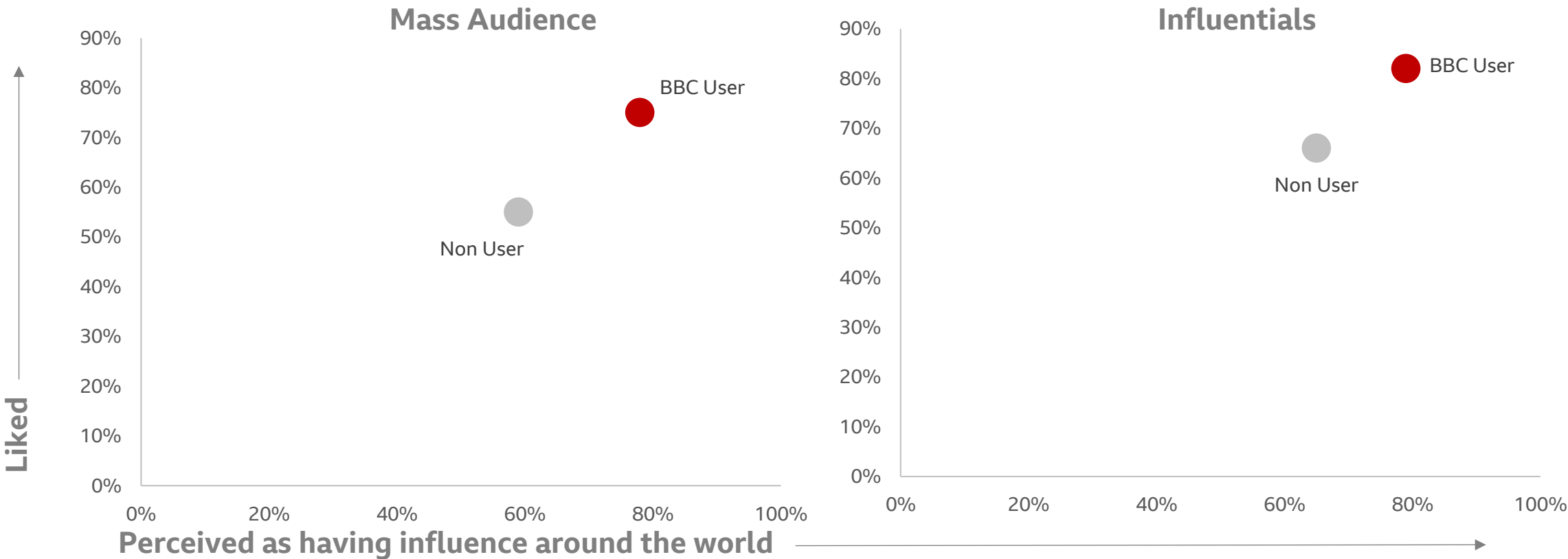


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BBC users are more favourable towards the UK and more likely to think it has global influence

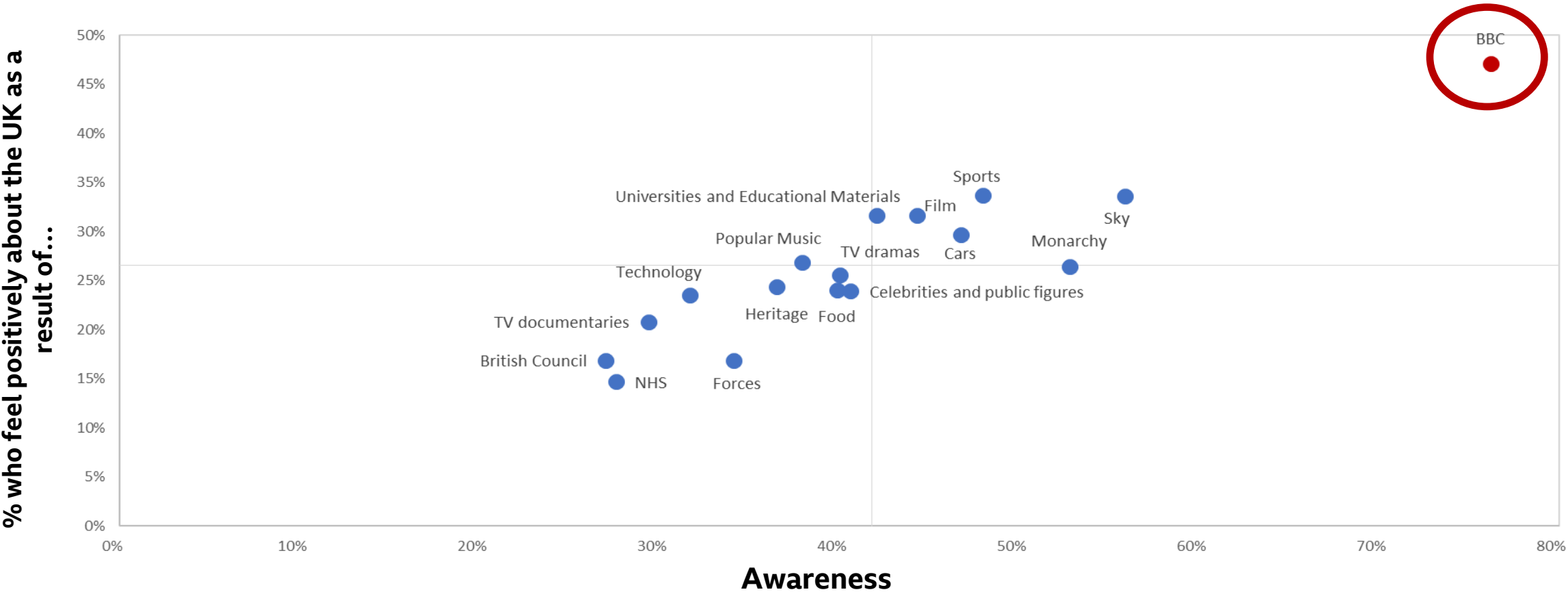
Perceptions of Countries: UK Has Global Influence & Liked

Among Mass Audiences and Influentials



The BBC is unmatched in driving UK favourability

Overall Impact of Cultural Exports to UK favourability
Among Influentials



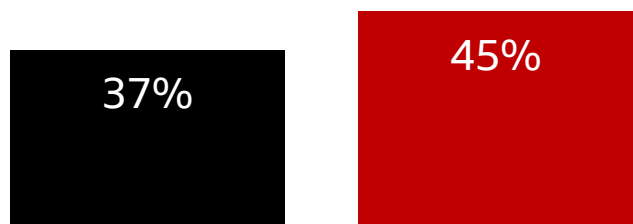
BBC users are much more likely to have invested or are willing to invest in the UK

Investing in the UK

Among Influentials

Engagement with the UK *Have previously invested*

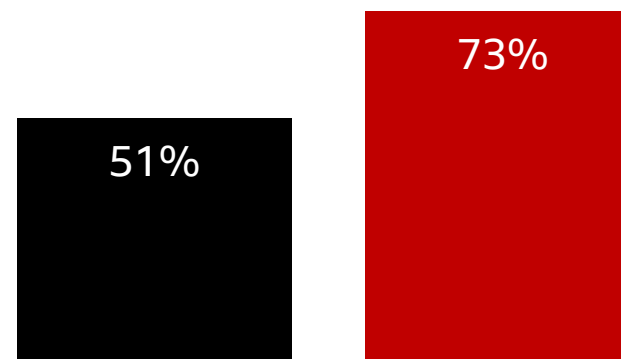
■ Non BBC User ■ BBC User



Investing in

Engagement with the UK *Intend to invest in future*

■ Non BBC User ■ BBC User



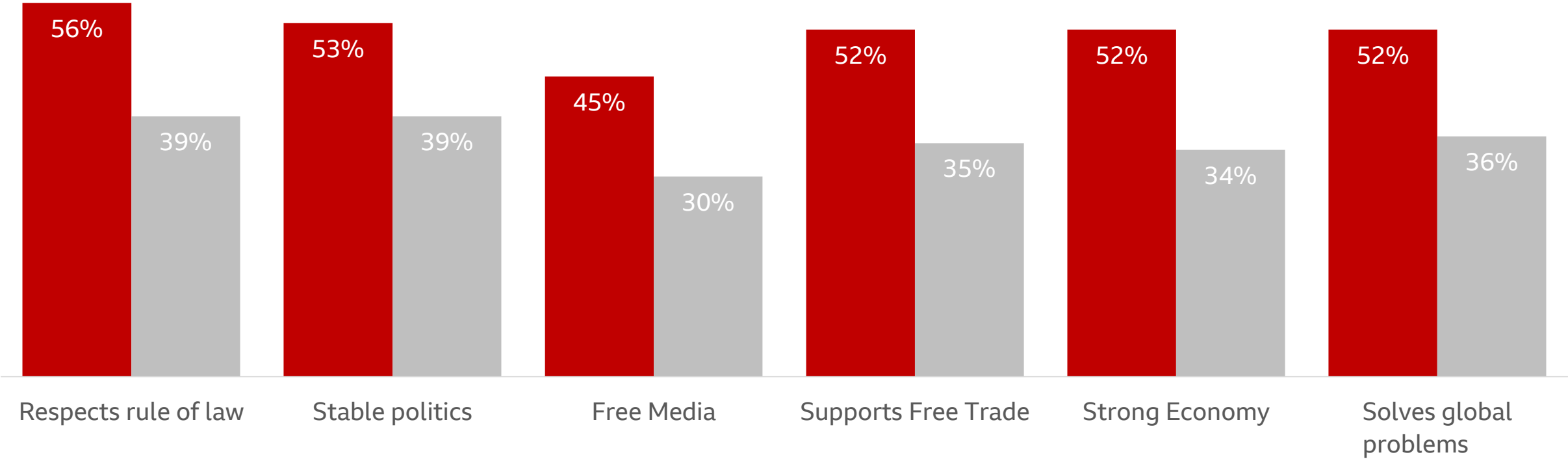
Investing in

BBC users are much more likely to regard the UK as having favourable conditions for business

Perceptions of the UK Business Environment

Among Influentials

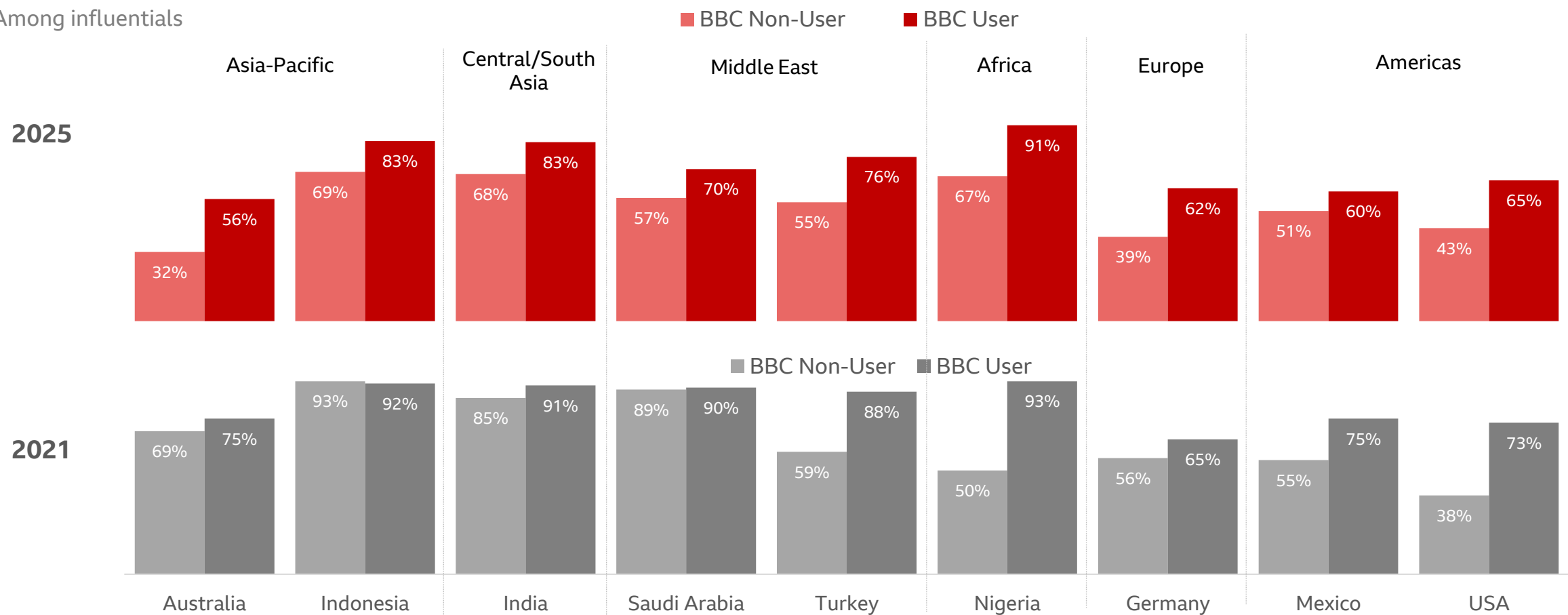
■ BBC Monthly User ■ Non-BBC



While intentions to invest in the UK have declined since 2021, BBC consumption softens this trend in most markets

Intentions to invest in UK

Intend to in the future NET
Among influentials



Summary



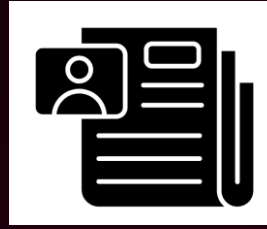
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Consuming, and specifically, trusting the BBC has a direct and significant impact* on promoting democratic values around the world.

The BBC's position as the **#1** trusted international news provider means that it plays an essential role in shaping perspectives worldwide



BBC users are **+27%** more likely to **favour democracy** than non-users



BBC users are **+22%** more likely to **support a free press** than non-users



BBC users are **+27%** more likely to believe in **following an international rules-based order** than non-users



BBC users are **+35%** more likely to **be favourable to the UK** than non-users



BBC users that are business decision makers are **+43%** more likely to **invest in the UK** than non-users

* Causal structural equation modelling analysis conducted by Tapestry Research

Thank you



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