GALLUP[®]

Rating World Leaders The U.S. vs. Germany, China and Russia

2020





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From Gallup's Editor-in-Chief

Although it may be hard now for many people to recall, 2019 was the closing act of a pre-pandemic "normal" for the world. Yet 2019, (in its own right) was a year of enormous uncertainty. Uncertainty about the global markets, the global order, coupled with one of the most unconventional U.S. presidential administrations in modern times.

Global perceptions of the world's leading nations often reflect the relative soft power of each global actor. But as much as any leader would love to be admired, leaders often need to make decisions bound by principles of their nation's interest.

Yet when you read the latest results in this report on how the world rates the leadership of major global powers, the leaders who presented the case for the most certainty did the best. All others remained relatively unpopular. Through that lens, it's not surprising that Germany's leadership came out on top in 2019 — as it has for the past several years. Longtime German Chancellor Angela Merkel, loved or hated, has been one of the most predictable leaders in highly uncertain times in both Europe and the global order established after the Second World War.

The image of U.S. leadership, on the other hand, remains relatively weak. For the third year in a row, the U.S. received historically low assessments from some of its closest historic allies. In fact, approval of U.S. leadership rose noticeably in some of the world's least democratic societies. And, the leadership of China and Russia remained essentially as unpopular as the U.S.

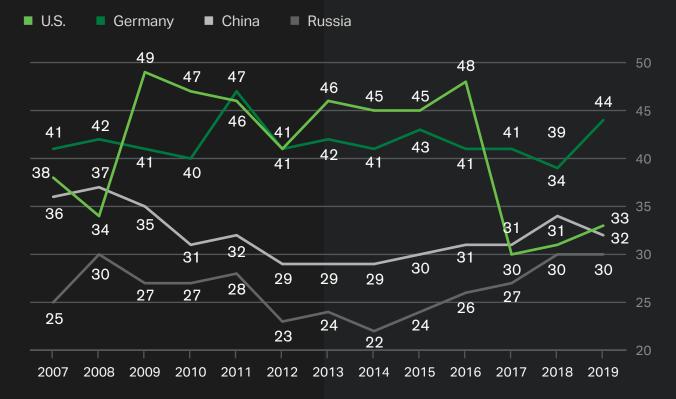
Halfway through 2020, both the United States' and China's responses to the coronavirus pandemic have been criticized from East to West. The image of U.S. leadership in particular could seriously suffer as the globe watches U.S. states and the federal government struggle to get infection rates under control.

But while 2019 may feel like a century ago, the public's impressions of the leadership of the world's major powers could, in some key regions, influence how each nation's leadership positions their own country's lot with each global power in 2020 and beyond.



Global Leadership Ratings

Median approval (%)



GALLUP WORLD POLL

Trump's Third Year: U.S. in Tight Competition With China and Russia for Second Place

After tumbling to a new record low of 30% during the first year of Donald Trump's presidency, the image of the U.S. was not much better in the third year of his term. The median global approval rating that adults across 135 countries and territories gave the job performance of U.S. leadership was 33% in 2019. Although ratings of U.S. leadership were on an upward trajectory from their lowest point on record, the latest approval rating is still one percentage point lower than the previous low of 34% under former President George W. Bush in 2008.

Germany in 2019 remained the top-rated global power for the third consecutive year, and on more firmer footing than in recent years. After dropping below 40% for the first time in a decade in 2018, Germany's median approval rating rebounded to 44% in 2019.

The approval ratings of the U.S., China and Russia continue to cluster closely together in the lower 30s. Although China edged slightly ahead of the U.S. in 2018 with an approval rating of 34%, China's 32% rating in 2019 places it on par with the rating for the U.S. Russia's approval rating of 30% in 2019 was unchanged from the previous year and now stands slightly lower than that of the U.S.

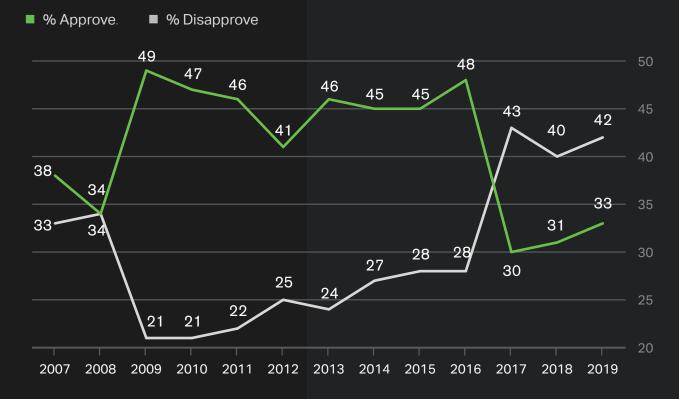
REPORT HIGHLIGHTS

- The leadership landscape in 2019 remained relatively unchanged in most regions. U.S. approval rose marginally to 33%.
- Approval ratings improved for the U.S. most in the Americas, where median approval reached 34%.



U.S. Leadership Approval

Medians



GALLUP WORLD POLL

U.S. Leadership Approval Improves Marginally, but U.S. Is Still in Weak Position

Trump's third year in office offered much more of the same from a foreign policy perspective. The U.S. retreated further from multilateralism abroad, making its withdrawal from the Paris climate accord official. And, for the third consecutive year, Trump used his address to the U.N. General Assembly to tout his "America first" message, saying, "The future does not belong to globalists; it belongs to patriots."

None of this rhetoric appeared to do additional harm or help U.S. approval ratings on a global scale, with the rating for U.S. leadership edging up to 33%. However, the image of the U.S. began the new decade in a weaker position globally than at most points in the previous two presidential administrations.

The new decade also began with a global pandemic that will likely affect how the world will judge the leadership of all four countries — Germany, the U.S., China and Russia — the next time that they are asked. All countries may see their global stock rise or fall based on how they have responded to the global crisis, but particularly China where COVID-19 is thought to have originated, and the U.S., which announced its withdrawal from the World Health Organization amid the pandemic.

Median approval of U.S. leadership across the 135 countries surveyed is up marginally from previous years, as is disapproval. A median of 42% of adults worldwide disapproved of the leadership of the U.S., which is still at a record level. As it did in 2018, the world in 2019 disapproved of U.S. leadership more than the leadership of any other country asked about. The disapproval rating of the U.S. was twice as high as Germany's (21%) and also higher than Russia's (33%) or China's (30%).

More Substantial Gains Than Losses

For the second consecutive year, approval ratings of U.S. leadership increased substantially in more countries than where they declined. Out of the 135 countries, U.S. leadership approval ratings declined by 10 points or more in just five countries — Lebanon, Iraq, Sierra Leone, Italy and Zambia. U.S. leadership approval increased 10 points or more in a mix of 12 countries or areas that span all regions of the world.

Regionally, the image of the U.S. continued to fare worst in Europe, where approval remained low and stable at 24% — unchanged from the median rating the previous year. The situation was similar in Asia, where the median approval was unchanged at 32%.

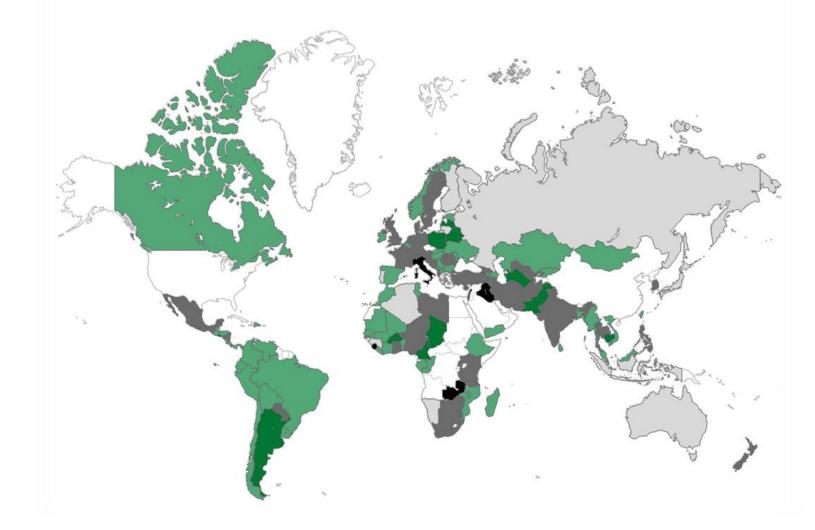
Median approval increased most in 2019 in the Americas, the only region where approval ratings have been increasing during the Trump presidency. Approval increased from a median of 24% in 2017 to 31% in 2018 to 34% in 2019. This mostly reflects not large increases, but positive movement in all but three countries in the region.

Africa as a whole remained the bright spot for U.S. leadership approval, as it has been for more than a decade. Nonetheless, the approval ratings for the region remained near their lowest level, clinging to a bare majority at 52% and unchanged from the previous year.

A closer look at where U.S. leadership stands at the regional and country levels reveals the areas of greatest vulnerability and strength.

More Big Gains Than Big Losses for the U.S.

■ Declines of 10 points or more ■ -9 to -1 ■ 0 ■ +1 to +9 ■ Increases of 10 points or more



Europe: Stable and Low Approval of U.S. Leadership

Europe became disenchanted with U.S. leadership in 2017, with median approval ratings dropping 19 points between former President Barack Obama's last year in office and Trump's first year. The situation hasn't changed much since. The 24% median approval rating is unchanged from 2018. However, the median 61% who disapproved of U.S. leadership in 2019 is a new high.

The U.S. gained majority approval in three countries or areas in Europe in 2019: Kosovo, which leads the region (and the world for the second year) in approval of U.S. leadership at 82%, Albania at 67% and Poland at 59%. People in Kosovo and Albania typically give the U.S. high approval ratings. However, the approval rating in Poland is the highest rating that Poles have given any U.S. leadership.

The image of U.S. leadership in Europe was worst in Iceland, where just 9% of the population

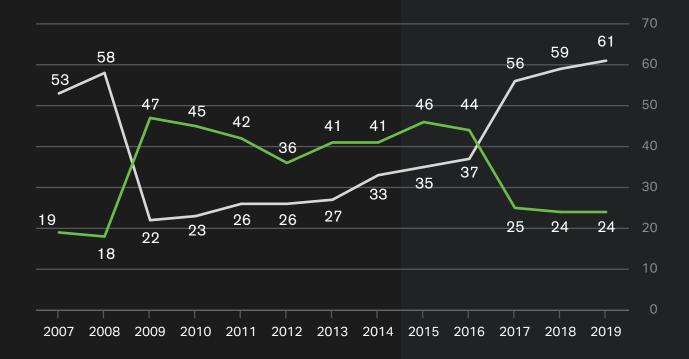
approved of U.S. leadership. Russians, who have typically been the least likely in the region (and the world) to approve of U.S. leadership, were not far behind at 11% — which was unchanged from the previous year.



U.S. Leadership Approval in Europe

Medians

■ % Approve. ■ % Disapprove



GALLUP WORLD POLL

EUROPE

Do you approve or disapprove of the job performance of the leadership of:

	GERMANY	U.S.	CHINA	RUSSIA
+ APPROVE	56%	24%	23%	19%
 DISAPPROVE 	24%	61%	51%	62%
? DON'T KNOW/ REFUSED	18%	17%	26%	19%
Columns may not add to 100% b	because of rounding			

GALLUP WORLD POLL, 2019

Germany Tops Leadership Approval

Of the four countries, Germany's leadership continues to be the most popular, with a median approval rating of 56%, which is undiminished from the previous year. While China led the U.S. in 2018, the U.S. and China are on equal footing in 2019. Median approval of U.S. leadership is 24% and the approval rating for China's leadership is 23%. Russia — which is typically the least popular in Europe — lost favor between 2018 and 2019. Just 19% in Europe approve of Russia's leadership, down from 21% the year before. Russia and the U.S. notably consistently elicit the same level of disapproval in Europe — with about six in 10 Europeans disapproving of the leadership of the two countries.

Few Rebounds From Declines in 2017

U.S. leadership approval vanished across much of Europe between 2016 and 2017, with NATO member states leading the way. Portugal posted a 51-point decline in approval ratings, followed by a loss of 44 points in Belgium and a 42-point drop in Norway. Ratings also dropped sharply among longtime G7 allies such as France, the United Kingdom, Germany and Italy.

By 2019, these ratings had failed to rebound, and in most instances were just as low if not slightly worse. In Italy, for example, ratings have continued to sink every year since 2016, dropping from 59% in 2016 to 45% in 2017 to 36% in 2018 and to 22% in the most recent survey.

Notably, approval ratings did improve substantially — by 10 points or more — in a few countries in Europe between 2018 and 2019. In Belarus, approval of the U.S. nearly doubled from 13% to 25% as long-time leader Alexander Lukashenko last year proposed "turning over a new leaf" and offered a potential reset in the historically fraught ties between his country and the U.S. Approval ratings increased by a similar margin in Latvia (13% to 26%) and in Poland (49% to 59%). As noted previously, the ratings of U.S. leadership in Poland were the highest in Gallup's record in 2019, reflecting the warm relationship between President Andrzej Duda and Trump since 2017. Duda was actually Trump's first foreign visitor to the White House in late June after the COVID-19 lockdown.

REGIONAL HIGHLIGHTS AND INSIGHTS

- U.S. leadership approval declined substantially in Italy.
- Residents in seven countries or areas were more likely to approve than disapprove of U.S. leadership: Hungary, Poland, Romania, Moldova, Kosovo, Ukraine and Albania.

Do you approve or disapprove of the job performance of the leadership of the United States?

EUROPE	APPROVE	DISAPPROVE	DON'T KNOW/ REFUSED	CHANGE FROM 2018 AND 2019 (PCT. PTS.)
Albania	67%	20%	13%	-2
Austria	11%	80%	9%	-3
Belarus	25%	44%	31%	12
Belgium	17%	71%	13%	1
Bosnia and Herzegovina	23%	55%	22%	-1
Bulgaria	26%	30%	44%	3
Croatia	25%	56%	19%	-6
Denmark	24%	70%	6%	-7
Estonia	17%	46%	37%	3
Finland	20%	73%	7%	0
France	23%	65%	12%	-3
Germany	12%	78%	10%	-5
Greece	19%	64%	17%	0
Hungary	47%	22%	31%	5
Iceland	9%	73%	18%	9
Ireland	30%	62%	7%	4
Italy	22%	73%	5%	-14
Kosovo	82%	11%	7%	2
Latvia	26%	49%	25%	13
Lithuania	28%	30%	42%	0
Luxembourg	24%	69%	7%	6
Malta	30%	50%	21%	4
Moldova	45%	30%	25%	7
Montenegro	37%	35%	28%	9
Netherlands	20%	77%	3%	-1
North Macedonia	34%	45%	21%	1
Norway	15%	82%	2%	3
Poland	59%	20%	20%	10
Portugal	14%	73%	13%	0
Romania	36%	23%	41%	-6
Russia	11%	56%	33%	0
Serbia	19%	61%	19%	2
Slovakia	28%	55%	17%	1
Slovenia	20%	73%	7%	-1
Spain	23%	72%	5%	1
Sweden	12%	74%	14%	-1
Switzerland	13%	74%	13%	-3
Ukraine	32%	29%	39%	5
United Kingdom	25%	65%	10%	-1

Americas: U.S. Leadership Image Slowly Improving

In 2017, the image of U.S. leadership looked the worst among the country's closest neighbors in the Americas, with median approval sitting at 24%. The situation has improved every year since, with median approval ratings rising to 31% in 2018 and up again in 2019 to 34%. The increase is mostly because perceptions have changed for the better — although not substantially — in all countries except Mexico, Nicaragua and Paraguay.



U.S. Leadership Approval in the Americas

Medians

■ % Approve ■ % Disapprove



GALLUP WORLD POLL

A Few Gains, No Major Losses

As in 2018, there were no double-digit losses in approval in any country in the region in 2019. And, in Argentina and El Salvador, there were double-digit increases in approval.

But the news wasn't all positive. Residents in most countries in the Americas continue to be more disapproving than approving of U.S. leadership. The exceptions are the Dominican Republic — where a majority of residents approve of U.S. leadership — and El Salvador, Nicaragua, Paraguay and Honduras.

REGIONAL HIGHLIGHTS AND INSIGHTS

- Chileans, Mexicans and Uruguayans are among the least likely in the Americas to approve of U.S. leadership, with 19% or fewer in each country approving.
- Mexicans' approval rating of U.S. leadership remains mired near record low, at 17%.

Do you approve or disapprove of the job performance of the leadership of the United States?

Argentina 26% 53% 21% Bolivia 31% 53% 16% Brazil 38% 44% 18% Canada 22% 75% 3% Chile 16% 67% 18% Colombia 41% 45% 15% Costa Rica 31% 50% 18% Dominican Republic 56% 28% 16% Ecuador 34% 45% 21% El Salvador 44% 43% 13% Honduras 41% 42% 17%	12 9 3 6 4
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Honduras 41% 42% 17%	17
	4
	1
Jamaica 21% 47% 32%	*
Mexico 17% 75% 8%	-2
Nicaragua 36% 35% 29%	-1
Panama 36% 52% 12%	6
Paraguay 30% 26% 44%	-7
Peru 34% 54% 12%	2
Uruguay 19% 55% 26%	
Venezuela 39% 54% 8%	2

*Data unavailable in 2018

16

Germany, U.S. Vying for Approval in the Americas

No one country out of the four gets particularly high approval ratings in the Americas, and residents in the region are as likely to approve of Germany's leadership (35%) as they are the leadership of the U.S. (34%). Germany holds a slight edge over China (32%), and all three have an edge over Russia (28%). Residents of the Americas are more likely to say they don't know enough to rate leadership of Germany, China and Russia than to say the same of U.S. leadership — but are also far more likely to disapprove of U.S. leadership than that of the other three countries.

THE AMERICAS

Do you approve or disapprove of the job performance of the leadership of:

MEDIANS

	GERMANY	U.S.	CHINA	RUSSIA
	35%	34%	32%	28%
DISAPPROVE	25%	51%	35%	35%
? DON'T KNOW/ REFUSED	38%	14%	32%	38%

Columns may not add to 100% because of rounding GALLUP WORLD POLL, 2019

Asia: U.S. Approval Ratings Mired at Record Lows

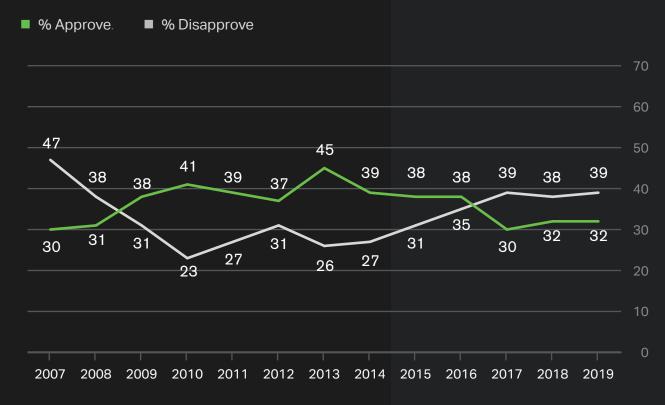
Ratings of U.S. leadership in Asia in 2017 slumped to lows not seen since the Bush administration and stayed there in 2018 and 2019. The median approval rating of 32% in 2019 is unchanged from the previous year. The ongoing trade war and rising tensions with China, tensions with Iran and mounting pressure to withdraw U.S. troops from Iraq and Afghanistan likely did not help the U.S. image.

Majorities in six Asian countries approved of U.S. leadership. This included Israel (64%), Mongolia

(62%), Turkmenistan (62%), the Philippines (58%), Nepal (54%) and Myanmar (53%). But for every country or region where a majority of adults approve of U.S. leadership in the region, there are two where the majority disapprove of U.S. leadership: Iran (88%), Palestinian Territories (80%), Yemen (80%), Lebanon (75%), Turkey (73%), Afghanistan (72%), New Zealand (72%), Iraq (67%), Australia (67%), Northern Cyprus (63%), Pakistan (62%), Hong Kong (60%) and Indonesia (51%).

U.S. Leadership Approval in Asia

Medians



Germany Earns Highest Approval Ratings

Of all four countries, Germany's leadership earns the highest approval ratings, with 39% in Asia approving of the country's leadership in 2019. The U.S. (32%), China (31%) and Russia (30%) are on similar footing.

ASIA

Do you approve or disapprove of the job performance of the leadership of:

MEDIANS

			~ ~	
	GERMANY	U.S.	CHINA	RUSSIA
+ APPROVE	39%	32%	31%	30%
 DISAPPROVE 	23%	39%	37%	36%
OON'T KNOW/ REFUSED	33%	24%	30%	24%

Columns may not add to 100% because of rounding GALLUP WORLD POLL, 2019

Mixed Gains and Losses

The United States' challenges in Asia are many, not the least of these is an ongoing trade war with China. In fact, the U.S. rating declined substantially in only two countries in 2019 — Lebanon and Iraq — which have little to do with the U.S. problems in the Pacific.

As Iraqi lawmakers' calls to remove U.S. troops from Iraq grew louder in 2019 after Israeli airstrikes, approval of U.S. leadership dropped 11 points from 38% to 27%. In Lebanon, U.S. leadership approval declined almost as much, with approval dropping from 30% to 20% as the U.S. suspended military assistance to the country with little explanation.

U.S. leadership did earn a few more admirers in the region, with approval increasing substantially in Turkmenistan, Singapore, Pakistan and Cambodia. The 32-point increase in approval ratings in Turkmenistan is particularly notable given the country's relative isolation.

REGIONAL HIGHLIGHTS AND INSIGHTS

- Iranians least likely in the world to approve of U.S. leadership, with a record-low 6% approving in 2019.
- U.S. leadership gains clout in Turkmenistan, Singapore, Pakistan and Cambodia.

Do you approve or disapprove of the job performance of the United States?

ASIA	APPROVE	DISAPPROVE	DON'T KNOW/ REFUSED	CHANGE FROM 2018 AND 2019 (PCT. PTS.)
Afghanistan	17%	72%	11%	-6
Armenia	32%	26%	42%	1
Australia	23%	67%	10%	0
Azerbaijan	39%	46%	15%	6
Bangladesh	42%	29%	29%	1
Cambodia	49%	6%	45%	10
Cyprus	27%	47%	27%	-1
Georgia	43%	26%	30%	-1
Hong Kong, Special Administrative Region of China	31%	60%	9%	*
India	34%	36%	30%	-5
Indonesia	21%	51%	27%	0
Iran	6%	88%	6%	-2
Iraq	27%	67%	6%	-11
Israel	64%	27%	9%	-3
Japan	34%	40%	25%	0
Kazakhstan	29%	32%	39%	4
Kyrgyzstan	32%	37%	31%	2
Laos	8%	6%	86%	8
Lebanon	20%	75%	5%	-10
Malaysia	19%	44%	37%	2
Mongolia	62%	16%	22%	2
Myanmar	53%	13%	34%	1
Nepal	54%	14%	32%	-1
New Zealand	17%	72%	11%	-2
Northern Cyprus	17%	63%	20%	-2

Do you approve or disapprove of the job performance of the United States?

ASIA	APPROVE	DISAPPROVE	DON'T KNOW/ REFUSED	CHANGE FROM 2018 AND 2019 (PCT. PTS.)
Pakistan	27%	62%	11%	13
Palestinian Territories	10%	80%	10%	3
Philippines	58%	32%	10%	-3
Singapore	39%	31%	30%	12
South Korea	41%	47%	12%	-3
Sri Lanka	48%	18%	34%	9
Taiwan, Province of China	40%	42%	18%	4
Thailand	34%	21%	45%	-5
Turkey	12%	73%	14%	-2
Turkmenistan	62%	24%	14%	32
Uzbekistan	35%	31%	34%	-2
Vietnam	32%	8%	60%	1
Yemen	10%	80%	10%	1

*No data available for 2018

22

Africa: Bare Majority Approves of U.S. Leadership

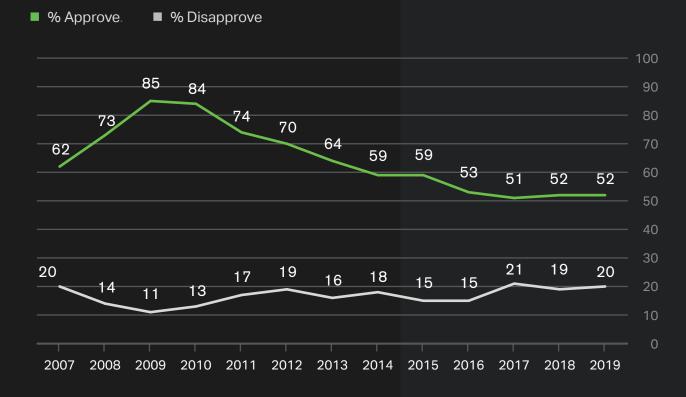
As it has every year, regardless of who is at the helm in the U.S., the image of the U.S. remained strongest worldwide in Africa in 2019. Bolstered by majority approval in 21 sub-Saharan African countries, median approval of U.S. leadership stood at 52% in 2019, unchanged from the previous year.

Residents in most African countries are more likely to approve than disapprove of U.S. leadership. Only in Libya, Morocco, Tunisia, Algeria, Namibia and South Africa are residents more likely to disapprove than approve.

As in the past, those in North Africa do not share the affinity for U.S. leadership that their counterparts in most sub-Saharan African countries do, and this is typically where the U.S. gets its lowest ratings. One in three or fewer adults in Algeria (33%), Tunisia (24%), Morocco (22%) and Libya (20%) approved of U.S. leadership in 2019.

U.S. Leadership Approval in Africa

Medians



Mixed Gains and Losses

In 2018, the U.S. did not suffer any major losses in leadership approval. There were just two in 2019, in Sierra Leone and in Zambia. Although ratings declined 11 points in Sierra Leone in 2019, a majority of residents (52%) still approved of U.S. leadership. In Zambia, the declines were much steeper — a loss of 19 points between 2018 and 2019. It's important to note that these declines took place in Zambia before the U.S. recalled its ambassador to the country in late 2019.

Ratings of U.S. leadership did rise substantially in three countries — Burkina Faso (62%), Cameroon (61%) and Chad (68%), where the majorities who approved only grew stronger.

REGIONAL HIGHLIGHTS AND INSIGHTS

- Majorities in more than half of the African countries surveyed approve of the job performance of U.S. leadership.
- Ratings of U.S. leadership declined by 10 points or more in two countries and rose at least as much in three.

Do you approve or disapprove of the job performance of the leadership of the United States?

AFRICA	APPROVE	DISAPPROVE	DON'T KNOW/ REFUSED	CHANGE FROM 2018 AND 2019 (PCT. PTS.)
Algeria	33%	56%	11%	0
Benin	63%	19%	18%	3
Botswana	24%	23%	53%	-5
Burkina Faso	62%	11%	27%	10
Cameroon	61%	22%	17%	10
Chad	68%	9%	23%	13
Comoros	56%	20%	24%	2
Congo Brazzaville	71%	17%	12%	9
Cote d'Ivoire	66%	14%	21%	9
Eswatini	33%	21%	45%	2
Ethiopia	37%	15%	48%	6
Gabon	65%	15%	19%	9
Gambia	39%	20%	41%	6
Ghana	58%	15%	27%	-7
Guinea	69%	9%	22%	0
Kenya	53%	27%	20%	-4
Lesotho	33%	14%	53%	*
Liberia	57%	19%	24%	3
Libya	20%	62%	18%	-2
Madagascar	52%	21%	27%	7
Malawi	48%	28%	24%	1
Mali	64%	12%	24%	8
Mauritania	41%	27%	32%	5
Mauritius	59%	29%	12%	5
Могоссо	22%	37%	42%	6
Mozambique	45%	26%	29%	3

Do you approve or disapprove of the job performance of the leadership of the United States?

AFRICA	APPROVE	DISAPPROVE	DON'T KNOW/ REFUSED	CHANGE FROM 2018 AND 2019 (PCT. PTS.)
Namibia	31%	52%	17%	0
Niger	65%	15%	20%	-2
Nigeria	56%	13%	31%	-3
Senegal	52%	17%	31%	4
Sierra Leone	52%	10%	38%	-11
South Africa	34%	39%	27%	-8
Tanzania	46%	29%	25%	-2
Тодо	69%	11%	20%	-3
Tunisia	24%	51%	25%	8
Uganda	47%	21%	31%	-5
Zambia	26%	13%	61%	-19
Zimbabwe	59%	16%	25%	-2

*Data unavailable in 2018

U.S., China Retain Strong Approval

China and the U.S. were pretty evenly matched in 2018 and 2019, with approval of the leadership of U.S. (52%) higher than the approval of China's leadership (51%) by one point. Germany (46%) and Russia (40%) — whose influence is also a target of concern for U.S. leadership — trail the other countries.

AFRICA

Do you approve or disapprove of the job performance of the leadership of:

MEDIANS

	U.S.	CHINA	GERMANY	RUSSIA
+ APPROVE	52%	51%	46%	40%
 DISAPPROVE 	20%	16%	18%	21%
OON'T KNOW/ REFUSED	25%	27%	31%	33%

Columns may not add to 100% because of rounding GALLUP WORLD POLL, 2019

Implications for 2020 and Beyond

Trump's "America First" foreign policy three years into his presidency appears to have failed to achieve one of the chief pillars of the administration's initial security strategy advancing American influence. Instead, the administration's transactional approach appears to have gained little traction.

While Gallup will not release another global measure of U.S. leadership approval before the next U.S. election, the next leader — Trump or former Vice President Joe Biden — clearly has a lot of work to do to advance U.S. influence around the globe.



Methodology

Results are based on face-to-face and telephone interviews with approximately 1,000 adults, aged 15 and older, in each country or area. Between March 2019 and February 2020, residents were asked to rate U.S., German and Russian leadership in 135 countries or areas, and residents in 136 countries or areas were asked to rate the leadership of China.

For results based on the total samples, the margin of sampling error ranges from ± 1.5 percentage points to ± 5.4 percentage points at the 95% confidence level. The margin of

error reflects the influence of data weighting. In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls.

For complete methodology and specific survey dates, please review <u>Gallup's Country Data</u> <u>Set</u> details. 29



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