BRITISH COUNCIL

FROM THE OUTSIDE IN

G20 views of the UK before and after the EU referendum

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ABOUT THE BRITISH COUNCIL

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FOREWORD

Events of the last 18 months are a potent reminder that we live in an age where uncertainty is the new normal. Given the considerable international challenges and opportunities the UK faces right now, having good intelligence to help understand what our trading partners think of us and want from us becomes important, as relationships change.

While most countries' views of other nations are often based on little more than stereotype and shift slowly over time, what the research highlights is that the UK is in a strong position relative to other countries in terms of its standing and attractiveness. The UK is particularly attractive to young educated people outside Europe, in the Commonwealth and elsewhere, which will be crucial to build on as we leave the EU.

The British may not want to be part of the EU, but they do not want to disengage from the world. Elsewhere the Ipsos Global Trends Survey shows that 56% of the British think globalisation is good for their own country, well ahead of America, Canada, Germany and of course France (31%).

What this report shows is that while Brexit may have some negative impacts on how EU countries see the UK, elsewhere the pattern is quite different. Above all one of the ironies of the research we cover in this volume is that the British themselves are more negative about the likely impact of Brexit on attitudes to the UK than are people in the rest of the G20 – which highlights the need to keep stressing Britain's global standing in studies like this one - and avoid self-defeatism.

Ben Page
Chief Executive, Ipsos MORI

London, June 2017

EXECUTIVE SUMMARY

Brexit represents a major turning point in the UK's international standing. Whatever people's attitudes to it, most would agree that the way the UK is viewed across Europe and the world will be more important than ever for the country's future. This report examines international views of the UK and the impact the recent referendum has had on them. It highlights both strengths and weaknesses in the UK's 'image' and points to opportunities – and risks – that the country should address as it moves to a future outside the EU.

The report presents the results of two surveys commissioned by the British Council and conducted by Ipsos MORI. The surveys examined the perceptions of young people across the G20 towards the UK, before and after the EU referendum. In general, the findings show the UK being viewed as one of the most attractive G20 countries, and continuing to be so after the vote (71 per cent of those questioned in both surveys found the UK 'attractive overall'). Indeed, the results across a range of questions showed relatively little change between the two surveys, unless respondents were specifically prompted to consider the referendum.

When they were asked to think about the impact of the referendum on the UK's attractiveness, 36 per cent said the result made no difference, and the proportion of respondents for whom it made a positive impact (32 per cent) was bigger than those for whom it had a negative one (21 per cent). There were, however, marked regional variations within these results. Across a range of indicators, in the European G20 countries there was a net negative impact from the referendum, whilst in the Commonwealth and the rest of the G20 there was a net positive one.

And, strikingly, the views of young British people on the likely impact of the referendum were significantly more negative than those of young people overseas, even those in Europe. This suggests that the UK has a lot more to do to enable its young people to face their international peers with confidence.

In general, the UK's people and institutions are and continue to be widely trusted, although trust in UK government is somewhat lower and has declined further since the vote. Again, this was more marked in European countries (where trust in the UK government declined from 56 per cent before the referendum to 48 per cent afterwards). Amongst the UK's continued perceived strengths are its higher education system and cultural institutions. It is rated less highly for tolerance of those with different faiths, and for whether its government works constructively with other governments around the world.

Many of the views of the UK among young people across the G20 appear to have changed relatively little as a result of the referendum. Where there are changes they form a mixed overall picture:

- The percentage of those agreeing that the UK is a global power rose from 60 to 61 per cent.
- Nineteen per cent said the referendum reduced the likelihood of them doing business with the UK (compared to 14 per cent who said it increased the likelihood, and 52 per cent who said it made no difference).
- The percentage saying the UK has world leading universities increased from 69 to 71 per cent.
- Seventeen per cent said they were now more likely to consume British culture (compared to 11 per cent saying they were less likely, and 60 per cent who said it made no difference).
- The percentage of those agreeing that British people are open and welcoming and that the UK demonstrates tolerance for other beliefs fell (from 55 to 53 and 54 to 52 per cent respectively).

While the UK is well perceived and seen to have good qualities, it cannot afford to be complacent. The report concludes that the UK would do well to find ways to demonstrate that it is a strong partner and to engage energetically with others to address its areas of weakness, and build on the strengths it clearly continues to enjoy. In particular it must find new ways to improve the way it is perceived by its European neighbours, particularly by encouraging young Europeans to visit, study in, or do business with the UK. At the same time the UK must also reach out to old allies and rising powers further afield to take advantage of the small but significant increases in its perceived attractiveness in those countries. In both cases this should involve leveraging the advantages supplied by its soft power assets. In both cases this will require the encouragement of greater international engagement in culture, education, and personal connections. If the UK is to prosper after Brexit, it will need to pay close attention to the views from the outside in.

RECOMMENDATIONS

It is how the UK proceeds from this point that will have a lasting impact on its global reputation. This study suggests that there are opportunities as well as risks.

Confidence, openness, and optimism– as well as realism – among the UK's people, institutions and government are prerequisites for success.

In pursuing the vision of a globally connected country the UK must:

1. Ensure that its foreign policy is informed by the best available data on sentiments towards the UK around the world, and an understanding of the UK's internationally perceived strengths and weaknesses.
2. Appreciate how well the UK is perceived internationally and why, and be strategic in nurturing its soft power strengths as it pursues relationships once it is outside the EU.
3. Provide opportunities for personal friendships to be developed and cultural exchange to flourish by maintaining and growing future connections in the EU.
4. Scale up personal, scientific, educational and cultural exchange as a powerful means of establishing stronger ties with partners in the Commonwealth and other major global economies. This softer engagement could also over time help build a platform for more trade.
5. Address the lack of confidence among young British people, suggested by the fact that they are more negative than their G20 peers about the impact of the UK's vote to leave the EU. Young Britons must be supported to develop global awareness and get exposure to other countries, cultures and languages through the education system, in the workplace and via civil society.
6. Put in place the systems necessary for open and successful engagement with the countries of the EU and globally, which are dependent on a reasonable ease of movement of students, researchers, academics, artists and creative professionals and, perhaps most importantly in the long run, for young people.

INTRODUCTION

A political earthquake struck the UK on 23 June 2016. To the surprise of many the country voted to leave the European Union. Much of the debate in the UK at the time and since has been focused on the domestic implications. Yet the question of the UK's influence in the world and how it may be affected by the result is now more important than ever and deserves greater attention. It will have important implications for different countries' willingness to engage with the UK on trade, study and culture.

Both sides in the debate have claimed that Brexit could constitute, for good or ill, an important turning point in the UK's international standing. Since the referendum, the UK government has committed itself to building an outward-looking 'global Britain', which plays a stronger international role. If the UK is to thrive outside the EU, this will be crucial. Yet if it is to succeed in building a more globally connected country, it is important that the UK starts with an accurate picture of how others around the world see it and what they want from it. Is the UK viewed as an attractive partner for collaboration? Is it trusted? Do others want to engage with it? How does this compare to the way other countries are perceived? Has the referendum result changed things? If so, what opportunities and risks has the result thrown up in different parts of the world?

To explore these important issues, the British Council undertook two international surveys in 2016, each with samples of over 19,000 respondents. These formed part of the British Council's continuing research programme into the views of young people around the world.

The British Council commissioned Ipsos MORI to conduct the first survey in May and June 2016, covering 18 to 34 year olds in all 19 nation states in the G20 – the UK's closest economic and cultural competitors and partners – to examine levels of trust that existed between these countries, and their levels of attraction to each other. The sample was chosen because this age range will contain future leaders in politics, business, education and culture who will be the people the UK will need to engage over the next 20–30 years if it is to continue to develop its international partnerships. The survey was then repeated with fresh samples in the autumn of 2016, after the outcome of the EU referendum was known, to enable a comparison of perceptions. It also enabled additional questions to be asked about the impact of the referendum specifically and its effects on likely future engagement with the UK, whether positive or negative. Further details about the research methodology are set out in the appendix to this report on page 35.

The two studies together represent the British Council's biggest effort to date to collect views of the UK among educated young people internationally. They build on earlier studies of how the UK is seen by people around the world undertaken in 2013–14 [1] and 2010–11 [2].

This report presents the full picture of how the UK was viewed before and after the vote to leave the EU and discusses the possible implications, highlighting clear opportunities and risks to the UK's future international engagement and the role that culture, education and personal engagement might play in responding to them.

[1] British Council (2014) *As Others See Us*: https://www.britishcouncil.org/sites/default/files/as-others-see-us-report-v3.pdf

[2] *Trust Pays*: https://www.britishcouncil.org/sites/default/files/trust-pays-report-v2.pdf

HOW THE G20 COUNTRIES PERCEIVE EACH OTHER

In today's increasingly interconnected world, soft power is more important than ever for countries' success on the world stage. It will be particularly important for the UK as it seeks to forge a new global identity, post-Brexit. In recent years the UK has consistently been viewed as one of the world's most successful soft power nations. The Portland Soft Power Index 2016,[3] compiled before the EU referendum, draws on a combination of objective and perception-based indicators. In this index the UK has dropped from the top spot (which it occupied in 2015) into second place, behind the USA. The more recent Anholt-GfK Nations Brand 2016 index,[4] based on a survey conducted after the UK's referendum, shows that all the top ten countries' brand scores have fallen since 2015. The UK remains in third place, behind the USA and Germany, but its score has fallen more than that of the other top ten countries. The latest *Monocle* Soft Power Survey, released in its December 2016/January 2017 issue,[5] places the UK at number four, behind the USA, Germany and Japan, in its soft power league table.

A country's soft power depends on the attractiveness of its assets and its success in using those assets for influence.[6] The generation – and erosion – of soft power takes place in an increasingly competitive and fast-changing global context.[7]

So how is the attractiveness of the UK and its soft power assets standing up? And when and how much can such perceptions change? After the vote to leave the EU, these questions are of great importance for the UK as it seeks to maintain and enhance its influence in the world.

The surveys conducted for the British Council by Ipsos MORI in spring and autumn 2016 asked respondents in each of the 19 individual states in the G20 to rate the 18 other G20 countries for their overall attractiveness to them as individuals, from very attractive to very unattractive.

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[3] http://softpower30.portland-communications.com/wp-content/themes/softpower/pdfs/the_soft_power_30.pdf

[4] http://nation-brands.gfk.com

[5] https://monocle.com/film/affairs/soft-power-survey-2016-17/

[6] Nye, J (2011) *The Future of Power*. New York: PublicAffairs.

[7] British Council (2013) *Influence and Attraction*. https://www.britishcouncil.org/organisation/policy-insight-research/research/influence-and-attraction

The results are set out in full in Figure 1 and show the G20 countries ranked by their overall attractiveness to the young people surveyed. They show that the eight most developed, democratic and open G20 members received the highest scores, with between 66 and 76 per cent of respondents rating them as attractive and only between eight and 16 per cent rating them as unattractive.

Of the others, only Brazil received a positive rating for attractiveness from more than 50 per cent of the respondents. However, for all but one of the G20 economies, the proportion of respondents who rated them as attractive outweighed the proportion that rated them as unattractive. The exception was Saudi Arabia, where the proportion that rated the country as unattractive (42 per cent) exceeded the proportion that rated it as attractive (34 per cent) by eight per cent. Among the most attractive nations only five percentage points separated Canada, Australia, Italy, France and the UK, the five countries that received the highest ratings.

The UK was rated as attractive by 71 per cent of those asked in both the pre- and post-referendum surveys.

Figure 1: G20 economies and attractiveness

How attractive overall do you find each of the following countries?

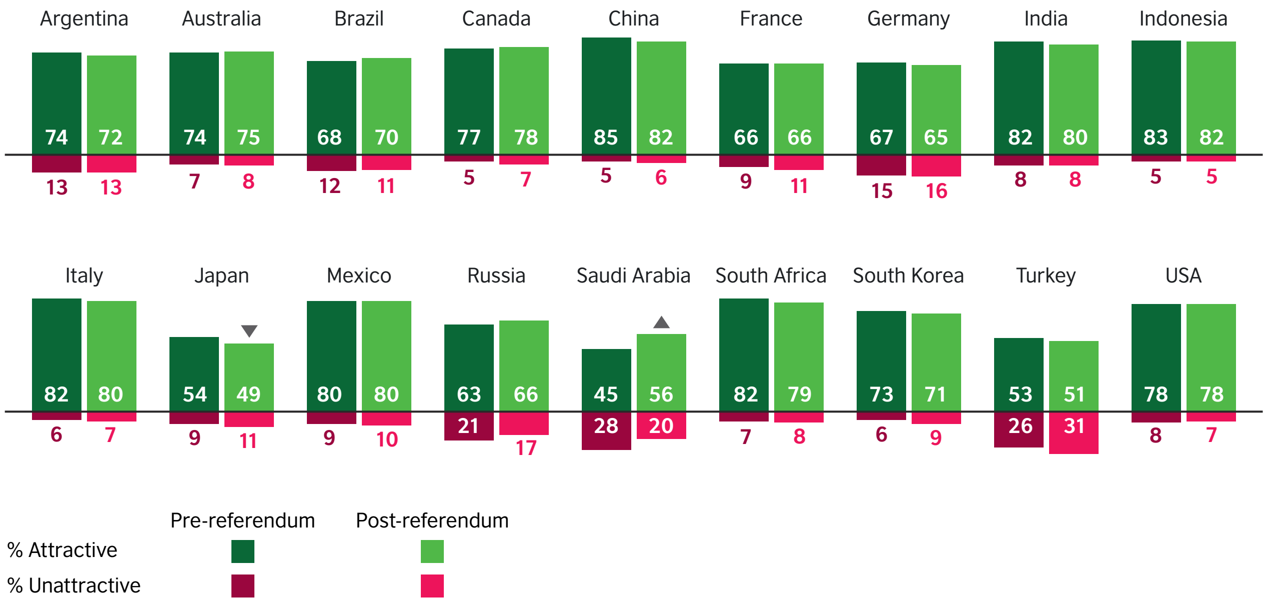
All asked about each country. Pre-referendum fieldwork 23 May – 16 June 2016; post-referendum fieldwork 8 September – 16 October 2016.
Source: Ipsos MORI

Figure 2 provides a more detailed country breakdown of the ratings for the UK. There are clear differences in how attractive the UK was seen to be across the other G20 countries. Only around half of the Japanese and Turkish respondents rated the UK as attractive, while in China and Indonesia more than four in five people did so. Differences between ratings in the first and the second survey were small in most countries. An exception was Saudi Arabia, where there was an increase of 11 percentage points (to 56 per cent) in the number who rated the UK as attractive between the two surveys. Further results below set out how each country rated the UK's attractiveness.

It should be noted that at this point in the study no mention had been made of the referendum. The next section looks at what those questioned thought about more specific aspects of the UK.

Figure 2: UK attractiveness

How attractive overall do you find the UK?



Global except UK participants (18,334) pre-referendum fieldwork 23 May – 16 June 2016. Global except UK participants (18,010) post-referendum. Fieldwork dates: 8 September – 16 October 2016.

Source: Fieldwork by Ipsos MORI

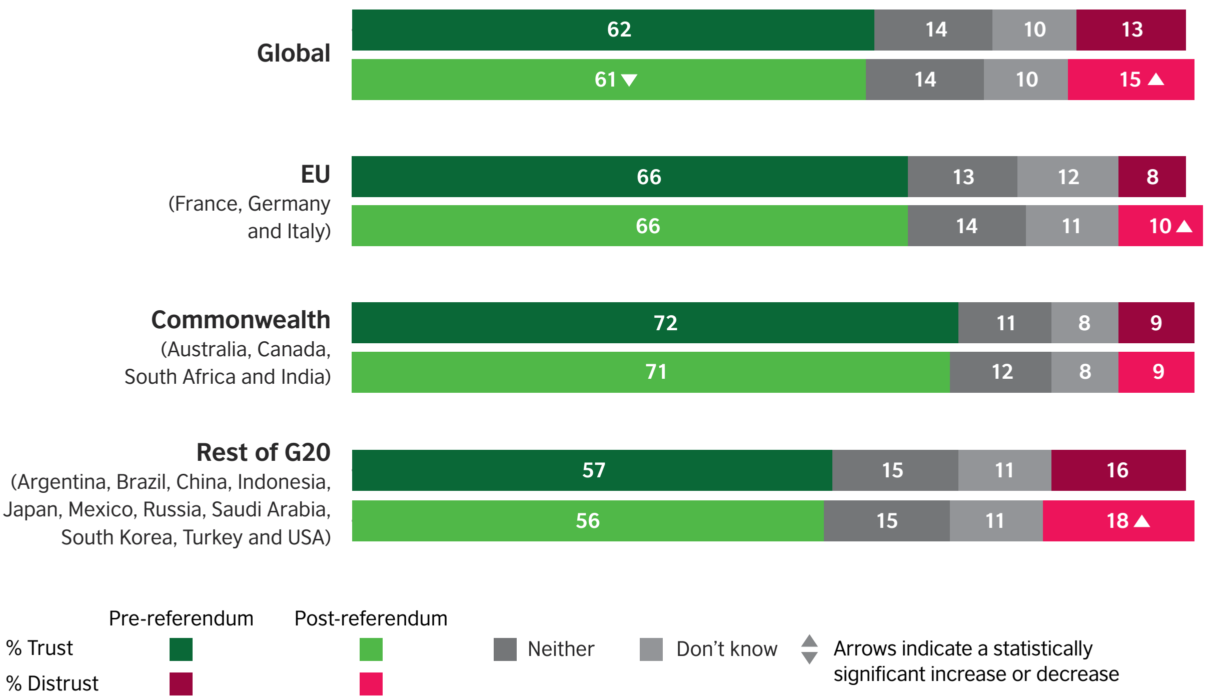
PEOPLE

Trust in British people remains high, with 61 per cent of respondents saying they trusted the people from the UK in the later survey. This was very slightly down, from 62 per cent in the pre-referendum study – a small but statistically significant reduction. However, perhaps more interesting are the variations which appear between survey respondents in different regions. A breakdown of results from countries in the EU, the Commonwealth and the rest of the G20 shows some noticeable differences. Overall, the levels of trust in British people was highest in the Commonwealth countries (over 70 per cent reported that they trusted British people and only nine per cent that they distrusted British people), followed by the EU countries (66 per cent in both surveys reported trusting British people), with the remaining G20 members last (57 per cent reported trusting British people pre-referendum and 56 per cent post-referendum). In the EU countries and the rest of the G20 the people who reported distrust increased by two percentage points, to ten per cent and 18 per cent respectively. See Figure 3 for a full breakdown of these results.

Further survey results set out on page 14 looked more closely at perceptions of a range of characteristics of British people among the other G20 countries. This reveals some small but significant changes between the pre- and post-referendum surveys.

Figure 3: Trust in people from the UK

Thinking generally about people, to what extent do you trust or distrust people from the UK?



Pre-referendum global (20,594), EU (3,000), Commonwealth (4,022), rest of G20 (11,312); post-referendum Global (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010). Data presented here is weighted to relevant national populations.

Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

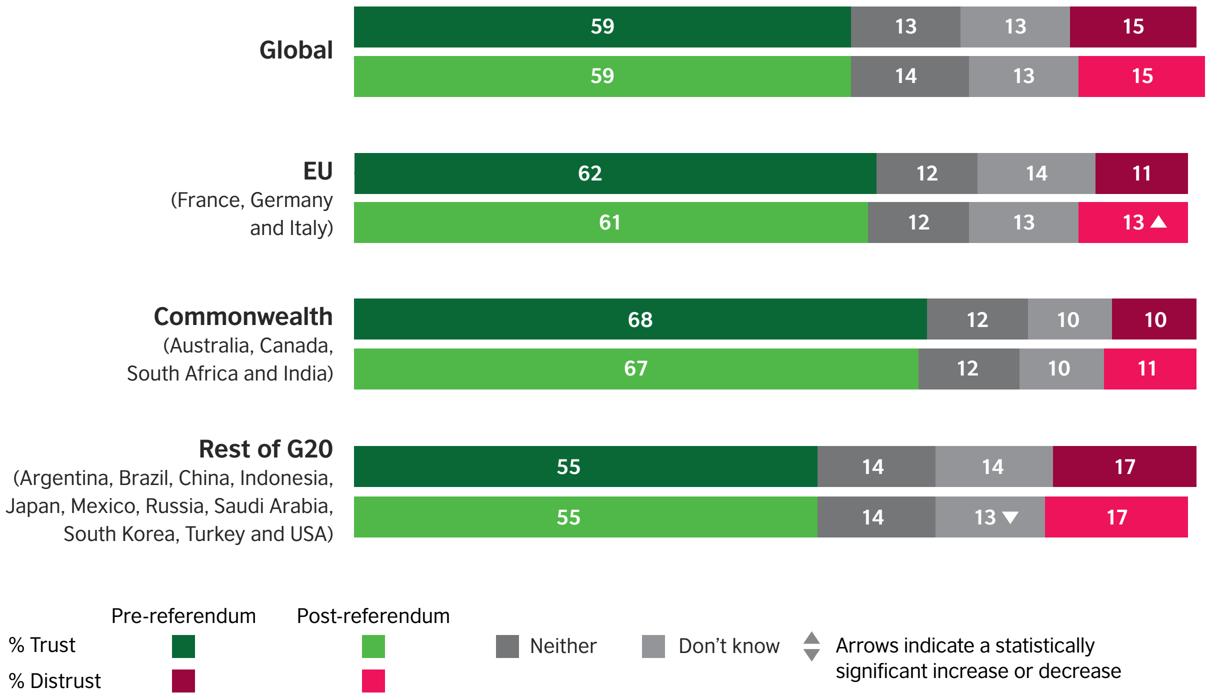
INSTITUTIONS

Figure 4 shows that trust in British institutions was high – not far behind levels of trust in the British people. Taken as a whole, 59 per cent of respondents said they trusted the UK's institutions and only 15 per cent said they distrusted UK institutions. There was no significant shift since the referendum.

Looking at the different country groupings, however, shows that the Commonwealth countries had the highest levels of trust in British institutions (67 per cent post-referendum), followed by the EU countries (61 per cent post-referendum) with 55 per cent of the remaining G20 countries saying they trusted them in both surveys. It is also worth noting that among the EU countries there was a small but statistically significant negative shift, with 13 per cent saying they distrusted British institutions post-referendum, compared to 11 per cent pre-referendum.

Figure 4: Trust in UK institutions

Thinking about institutions, to what extent do you trust or distrust UK institutions?



Pre-referendum global (20,594), EU (3,000), Commonwealth (4,022), rest of G20 (11,312); post-referendum global (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010). Data presented here is weighted to relevant national populations.

Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

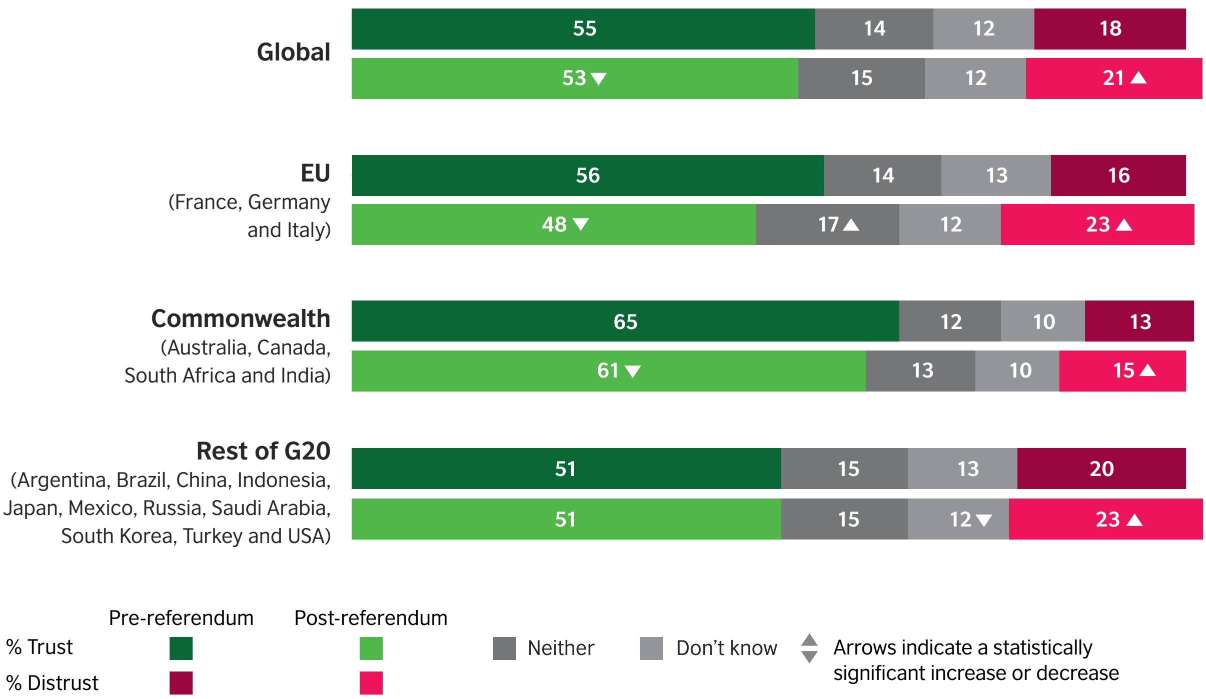
GOVERNMENT

Trust in governments tends to be lower than trust in people, as the British Council's previous publications and other studies have highlighted. These new surveys were consistent with these previous results. Nevertheless, Figure 5 shows that more than half of the global sample reported that they trusted the UK government. There has, however, been a drop in trust across the G20 from 55 per cent to 53 per cent since the referendum result, accompanied by an increase in respondents reporting distrust in the UK government from 18 per cent to 21 per cent. This effect was greatest in EU countries but also applies to a lesser extent in the Commonwealth as well as the rest of the G20, where distrust increased from 20 per cent to 23 per cent.

Figure 7 provides insights into perceptions in the other G20 countries of various characteristics of the UK government. This reveals small but significant changes between the pre-referendum and the post-referendum surveys.

Figure 5: Trust in UK government

Thinking about government, to what extent do you trust or distrust the UK government?



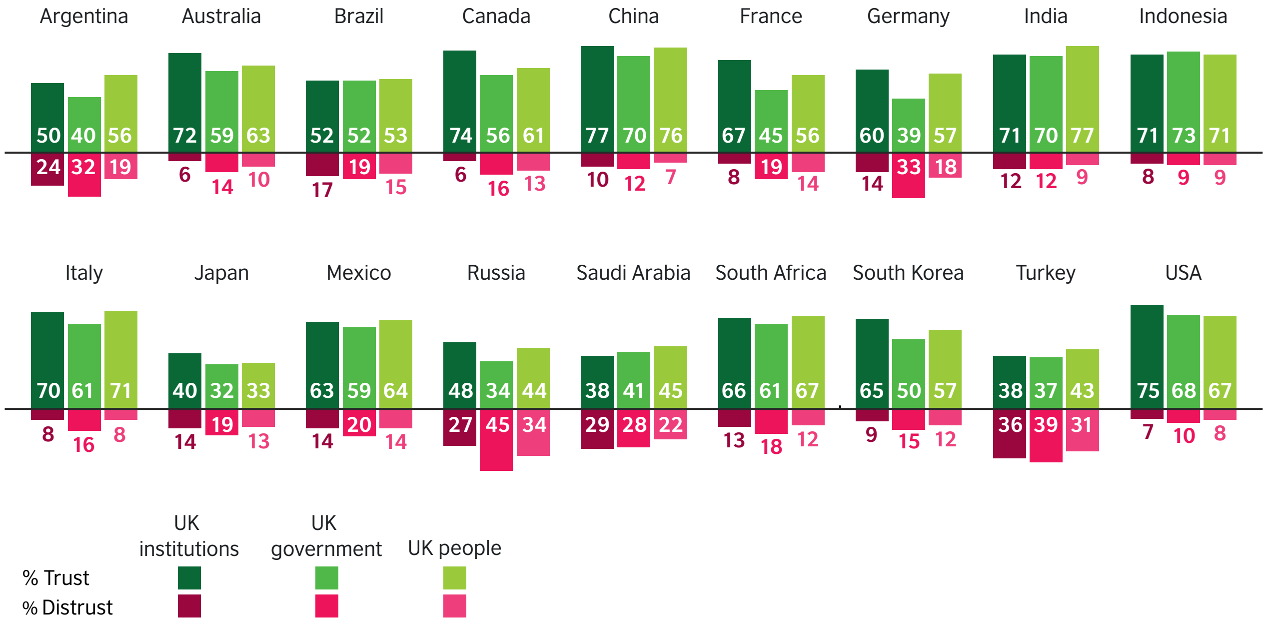
Pre-referendum global (20,594), EU (3,000), Commonwealth (4,022), rest of G20 (11,312); post-referendum global (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010). Data presented here is weighted to relevant national populations.

Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

Figure 6 provides a country breakdown of trust in the UK's people, institutions and government across the individual countries of the G20 as it stood in autumn 2016.

Figure 6: Trust in UK institutions, government and people by country

Thinking generally about UK institutions/government/people, to what extent do you trust or distrust them?



Base: All participants except UK participants (18,010). Post-referendum fieldwork 8 September – 16 October 2016.
Source: Fieldwork by Ipsos MORI.

HOW UK SOCIETAL CHARACTERISTICS ARE VIEWED

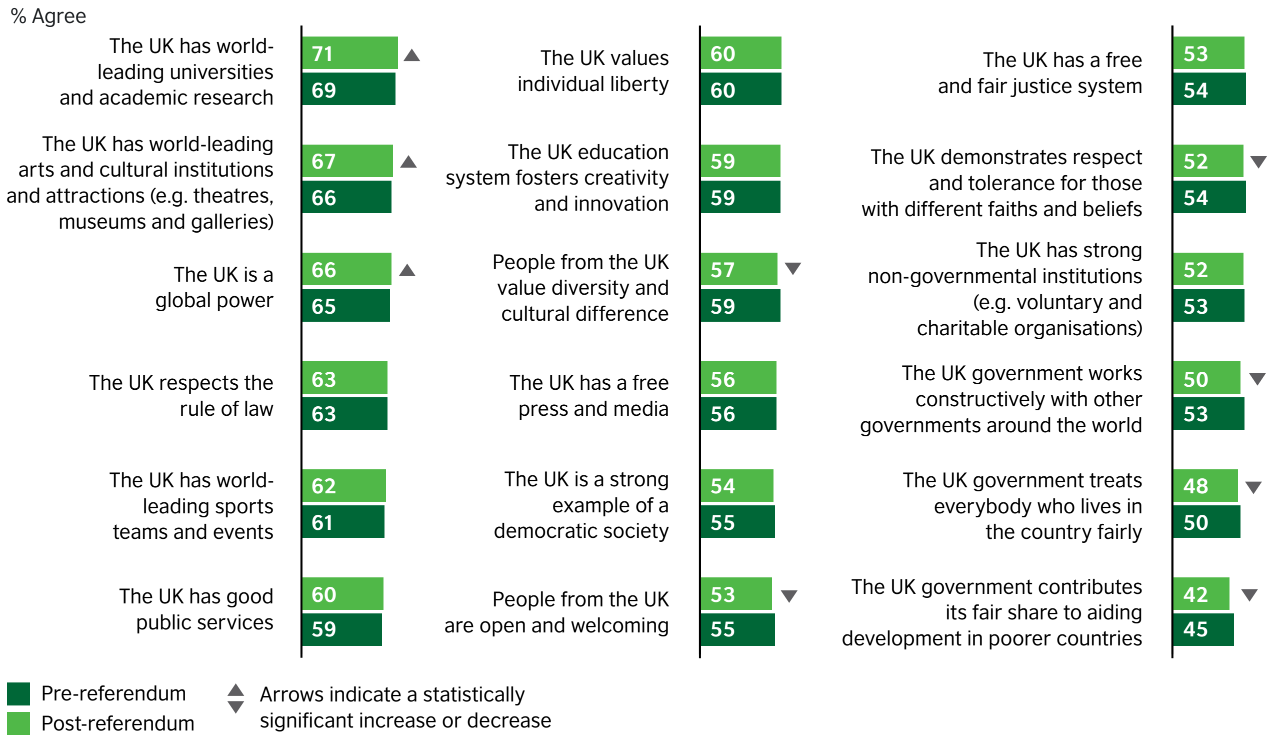
As can be seen in Figure 7, around two-thirds of respondents agreed that the UK has world-leading universities and academic research, that it has world-leading arts and cultural institutions, and that the UK is a global power. Indeed, the level of agreement was higher in the post-referendum survey than the pre-referendum study. In the latest survey 71 per cent agreed that the UK has world-leading universities (two percentage point increase), 67 per cent agreed that the UK has world-leading arts and cultural institutions and attractions (one percentage point increase), and 66 per cent agreed that the UK is a global power (one percentage point increase).

There were somewhat lower levels of agreement with the statements relating to people and government characteristics. In addition, those characteristics saw small (one to three percentage point) decreases in agreement between the pre- and post-referendum study. Respondents' agreement with the statement that the UK government works constructively with other governments around the world dropped from 53 to 50 per cent. Agreement that the UK demonstrates respect and tolerance for those with different faiths and beliefs dropped from 54 to 52 per cent. While 55 per cent of respondents agreed that people from the UK are open and welcoming in the pre-referendum survey, only 53 per cent agreed after the vote. Finally, 57 per cent of respondents agreed with the statement that British people value diversity and cultural difference in the second survey, down from 59 per cent.

While the UK overall is well regarded on the questions covered in the surveys, questions relating to the UK's government and people suggested a small but statistically significant negative shift in perceptions. See Figure 12 (page 19) for survey results regarding levels of trust in the UK government and Figure 13 (page 20) showing the levels of trust in UK people.

Figure 7: Perceptions of UK characteristics

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

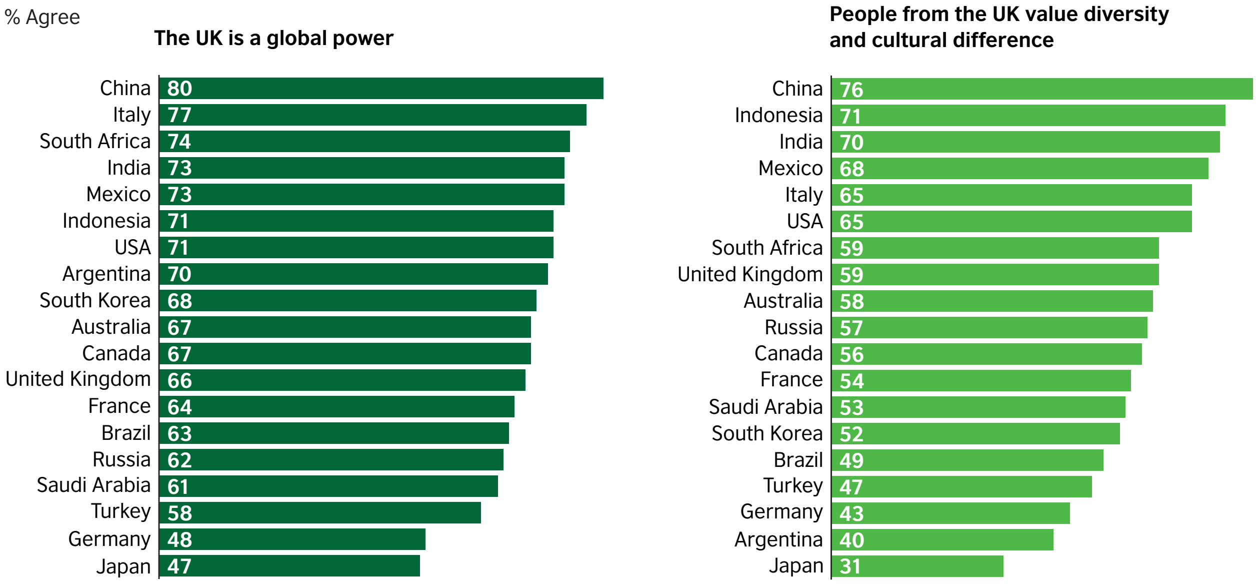


Base: Pre-referendum all participants (20,594), 23 May – 16 June 2016; post-referendum (19,010), 8 September – 16 October 2016.
Source: Fieldwork by Ipsos MORI.

Figure 8 provides a breakdown by country of responses to two of the statements in the survey: 'The UK is a global power' and 'People from the UK value diversity and cultural difference'. We can see that there are some variations. Less than half of respondents in Japan and Germany agreed that the UK is a global power, while in China 80 per cent agreed and in Italy 77 per cent agreed. Again, only 31 per cent in Japan and 40 per cent in Argentina agreed with the statement that people from the UK value diversity and cultural difference, while 76 per cent in China and 71 per cent in Indonesia agreed.

Figure 8: Perceptions of the UK characteristics – by country

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



Base: Post-referendum (19,010), 8 September – 16 October 2016
Source: Fieldwork by Ipsos MORI

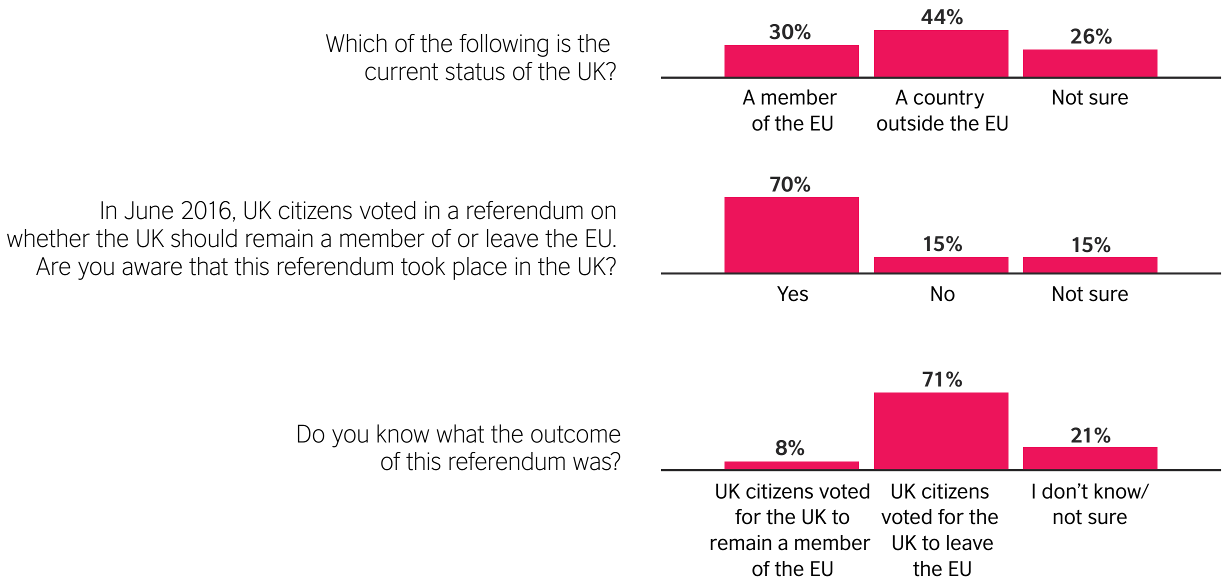
HOW THE EU REFERENDUM AFFECTS PERCEPTIONS OF THE UK

Some additional questions were introduced in the post-referendum survey to explore the effect respondents attributed to the referendum outcome itself when explicitly prompted to consider it.

KNOWLEDGE ABOUT THE UK AND BREXIT

Figure 9 shows, perhaps surprisingly, that 44 per cent of young people across the G20 wrongly thought the UK was no longer currently a member of the EU, while only 30 per cent correctly identified that the UK was still a member. On the other hand, a large majority (70 per cent) said they had been aware of the referendum taking place, and of those 71 per cent correctly identified the outcome. Only 15 per cent, when asked whether they were aware of the referendum, said they weren't sure.

Figure 9: Knowledge of the UK referendum on EU membership



Base: Post-referendum all participants except UK participants (18,010) 8 September – 16 October 2016; only those who are aware that the EU referendum took place, or who are not sure were asked about the outcome (15,240).

Source: Fieldwork by Ipsos MORI.

THE VIEW FROM INSIDE THE UK

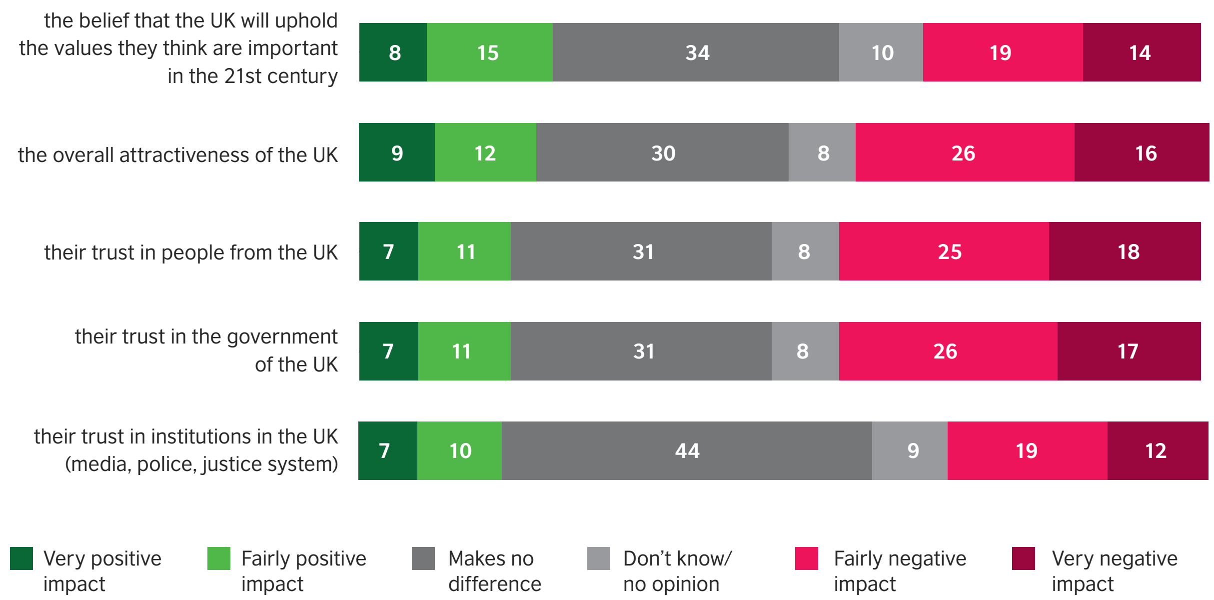
As well as asking questions of the other G20 economies about their views of the UK after the referendum vote, the survey also asked young people in the UK what they thought the impact of the referendum would be for the UK's attractiveness abroad and the levels of trust in their country overseas.

Figure 10 shows some British people thought that there would be a positive impact on levels of trust in the UK and its attractiveness (ranging between 17 per cent and 23 per cent), but this was outweighed in every case, by some margin, by a bigger group who thought it would have a negative impact (ranging between 31 per cent and 43 per cent).

As will become clear, the views of young British people on the impact of the UK leaving the EU was consistently more negative than was the case among young people abroad, including those from the EU countries in the survey.

Figure 10: UK views on the impact of the referendum result on people abroad

Does the UK's vote to leave the EU have a positive impact, negative impact or no impact on the views of people living abroad in terms of...



Base: All participants (1,000) post-referendum 8 September – 16 October 2016.
Source: Fieldwork by Ipsos MORI.

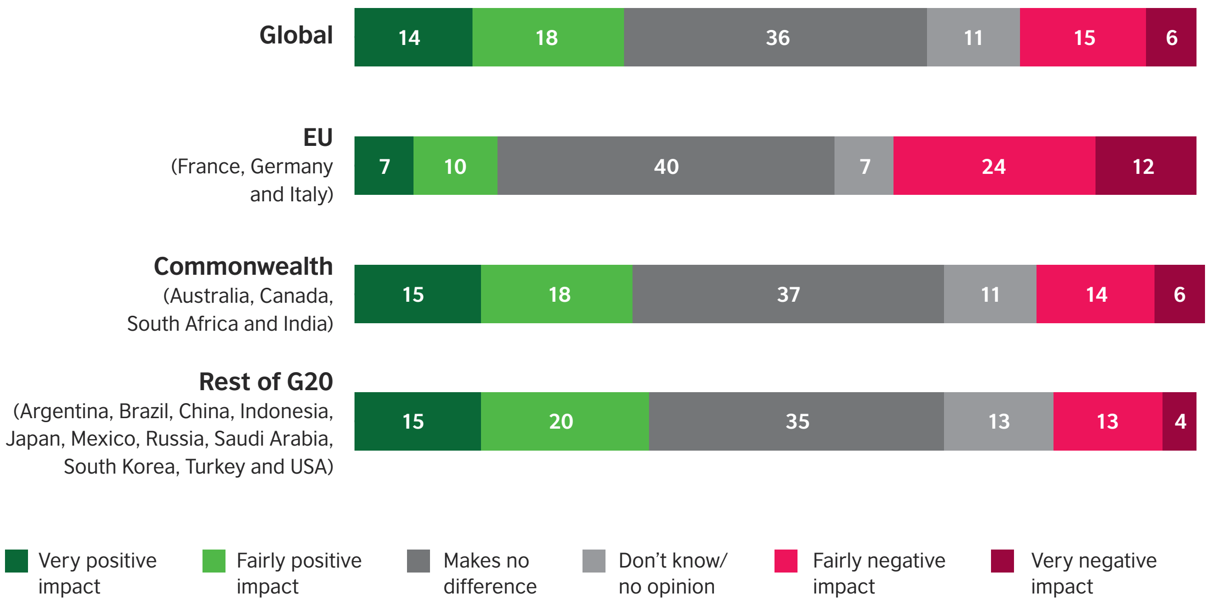
IMPACT OF THE VOTE TO LEAVE THE EU ON UK ATTRACTIVENESS INTERNATIONALLY

When asked to consider whether the vote to leave the EU had a positive, negative, or no impact on their perception of the attractiveness of the UK overall (Figure 11), 36 per cent said it made no difference.

The proportion of respondents for whom it made a positive impact (32 per cent) was bigger than the group for whom the referendum had a negative impact (21 per cent). It is encouraging for the UK that in the Commonwealth countries that took part in the survey and in the rest of the G20 (outside the Commonwealth and the EU) there was a net positive impact of the vote on the attractiveness of the UK. In the EU on the other hand there was a 19 per cent net negative impact on the UK's attractiveness, which is clearly concerning for the country's reputation in the EU.

Figure 11: Impact of EU referendum on the UK's perceived attractiveness

Does the UK's vote to leave the European Union have a positive impact, negative impact, or no impact on: your perception of the attractiveness of the UK overall?



Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010); fieldwork dates: 8 September – 16 October 2016. Data presented here is weighted to relevant national populations.

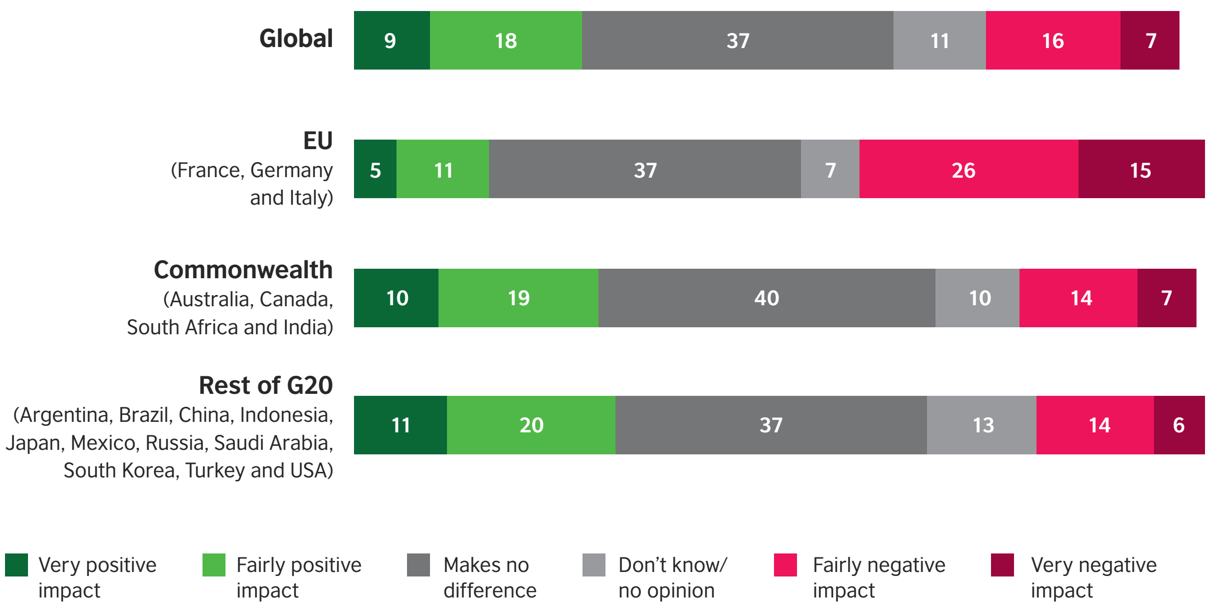
Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

IMPACT OF THE UK'S VOTE TO LEAVE THE EU ON TRUST IN GOVERNMENT

When asked specifically about the referendum and its impact on trust in the UK government (Figure 12), 37 per cent of respondents across the G20 reported that it made no difference. The proportion of respondents globally who reported a positive impact outweighed the proportion who reported a negative impact by four percentage points. However, the positive picture across the whole of the G20 hides a divergence in views between the Commonwealth and other G20 countries on the one hand, and the EU on the other. The 41 per cent of EU respondents for whom the result has had a negative impact on their trust in the UK government outweighed the 16 per cent who reported a positive impact, resulting in a net negative impact of 25 per cent in the EU survey sample. In the Commonwealth countries the proportion of respondents that reported a positive impact (29 per cent) outweighed the proportion that reported a negative impact (21 per cent) by eight percentage points. In the rest of the G20 countries there was a net positive impact of the vote of 11 per cent.

Figure 12: Impact of EU referendum on trust in UK government

Does the UK's vote to leave the European Union have a positive impact, negative impact, or no impact on: your trust in the government of the UK



Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010); fieldwork dates: 8 September – 16 October 2016. Data presented here is weighted to relevant national populations.

Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

IMPACT OF THE EU REFERENDUM ON TRUST IN PEOPLE

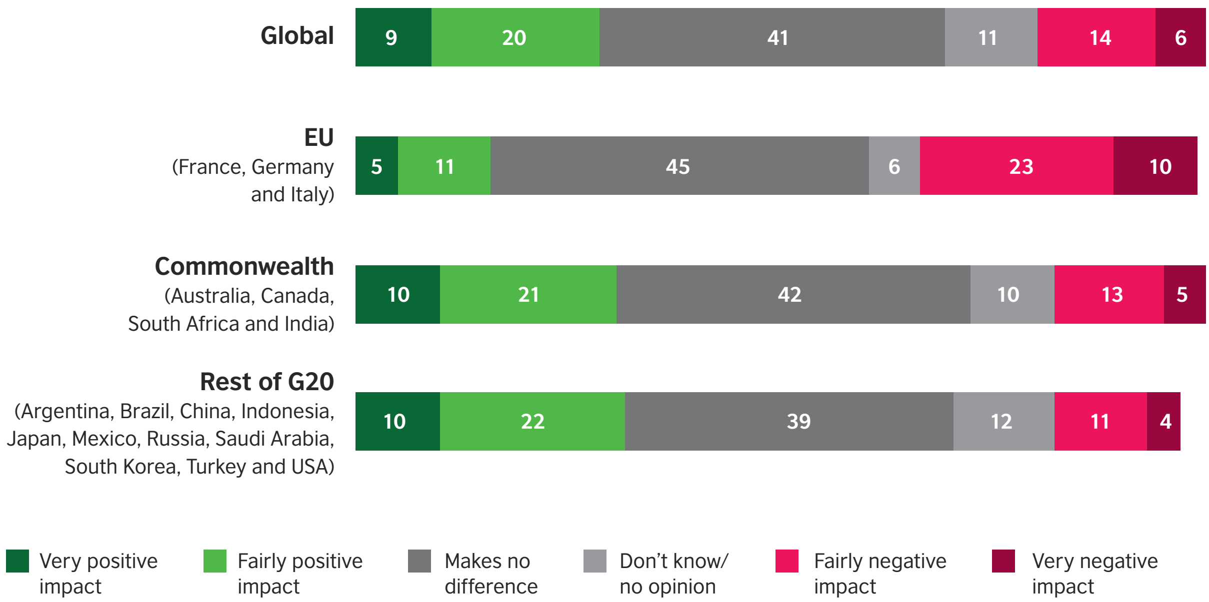
Again, considering the impact of the referendum on trust in the people of the UK (Figure 13), the survey highlighted clear differences between the EU on the one hand and the Commonwealth and the rest of the G20 on the other.

Some 33 per cent of EU nations' respondents said that the vote had a negative impact, while 16 per cent said it had a positive impact.

Conversely, in Commonwealth nations, 31 per cent saw the vote as having a positive impact, compared to 18 per cent negative. The figures for the rest of the G20 were 32 per cent positive and 15 per cent negative.

Figure 13: Impact of EU referendum on trust in people from the UK

Does the UK's vote to leave the European Union have a positive impact, negative impact, or no impact on: your trust in the people from the UK



Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010); fieldwork dates: 8 September – 16 October 2016. Data presented here is weighted to relevant national populations.

Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

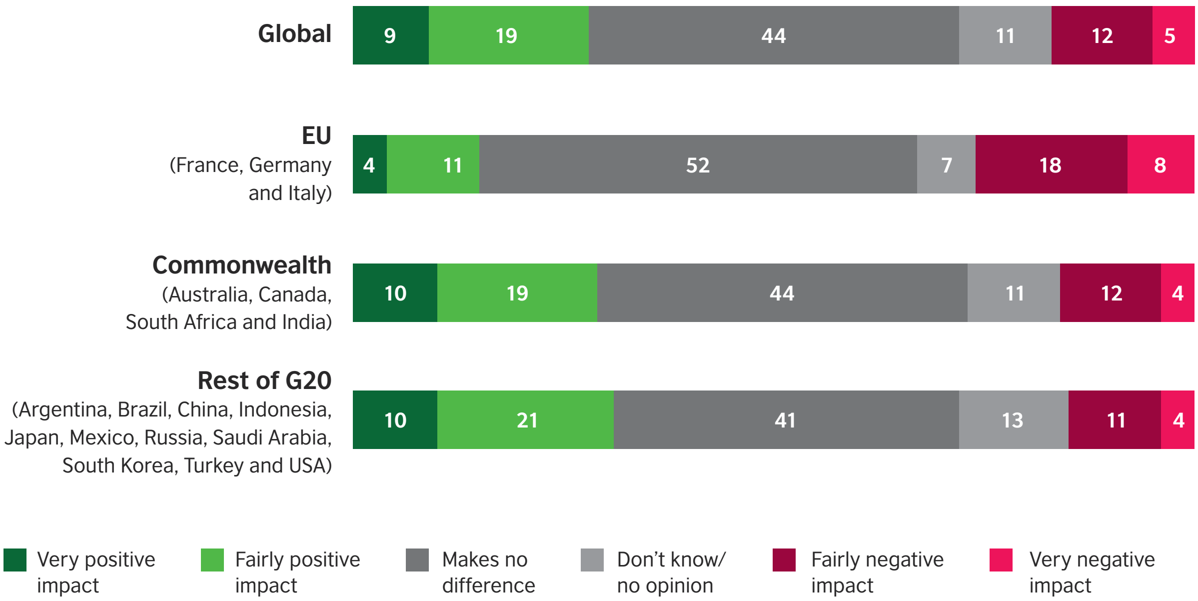
TRUST IN INSTITUTIONS

In the G20 as a whole, the largest group of survey respondents said the vote had no impact on their trust in UK institutions. This was particularly pronounced in EU countries, where more than half of the respondents (52 per cent) expressed this view. As Figure 14 shows, the proportion of respondents overall that reported the referendum as having a positive impact on their levels of trust in the UK outweighed the proportion that reported a negative impact by 11 percentage points. Again the EU countries in the study showed a net negative impact of 11 per cent.

This pattern of a net negative impact of the referendum on trust in the UK in the EU countries and net positive impact in the Commonwealth and the rest of the G20 countries held true across trust in the UK's government, people and institutions. The effect was particularly pronounced in the context of government but also holds true for the people and institutional dimensions of trust.

Figure 14: Impact of EU referendum on trust in UK institutions

Does the UK's vote to leave the European Union have a positive impact, negative impact, or no impact on: your trust in the institutions of the UK

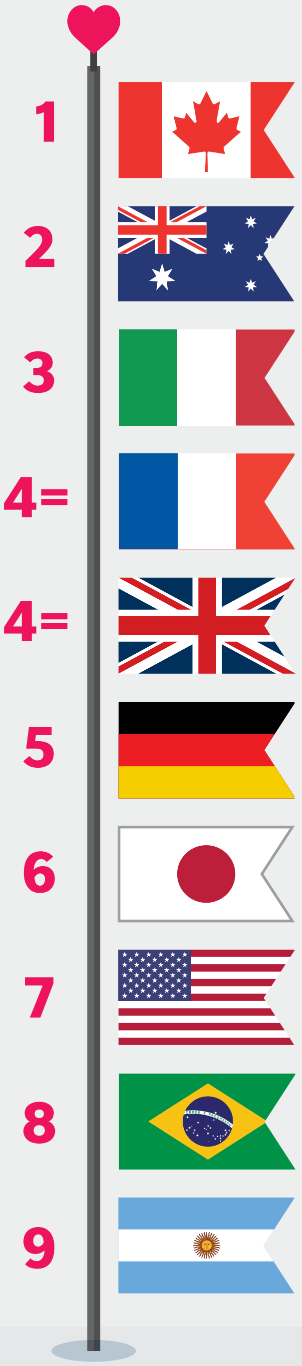


Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010); fieldwork dates: 8 September – 16 October 2016. Data presented here is weighted to relevant national populations.

Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

IMPACT OF EU REFERENDUM

TOP 10
COUNTRIES RANKED
BY ATTRACTIVENESS



1. Canada 2. Australia
3. Italy 4 = France/UK
5. Germany 6. Japan
7. USA 8. Brazil 9. Argentina

IMPACT OF EU REFERENDUM ON UK'S OVERALL ATTRACTIVENESS

Excludes UK data and the EU (which is the 20th member of G20).

IMPACT OF EU REFERENDUM ON TRUST IN UK...

	All G20 Positive	All G20 Negative	EU Positive	EU Negative	Commonwealth Positive	Commonwealth Negative	Rest of G20 Positive	Rest of G20 Negative
People	29%	20%	16%	33%	31%	18%	32%	15%
Institutions	28%	17%	15%	26%	29%	16%	31%	15%
Government	27%	23%	16%	41%	29%	21%	31%	20%

IMPACT OF EU REFERENDUM ON LIKELIHOOD TO...

	All G20 Positive	All G20 Negative	EU Positive	EU Negative	Commonwealth Positive	Commonwealth Negative	Rest of G20 Positive	Rest of G20 Negative
Study	15%	17%	5%	30%	16%	15%	17%	14%
Visit	23%	11%	10%	18%	25%	9%	25%	9%
Do business	14%	19%	6%	32%	15%	17%	15%	17%
Experience arts and culture	17%	11%	6%	11%	18%	10%	21%	9%
Make friends with people	17%	9%	6%	14%	18%	9%	20%	8%

...IN THE UK

KEY

Positive

Indifferent

Negative

Positive

Negative

G20
All G20

EU
France, Germany and Italy

G20
Rest of G20
Argentina, Brazil, China, Indonesia, Japan, Mexico, Russia, Saudi Arabia, South Korea, Turkey and USA

Commonwealth
Australia, Canada, South Africa and India

HOW BREXIT MIGHT AFFECT ENGAGEMENT WITH THE UK

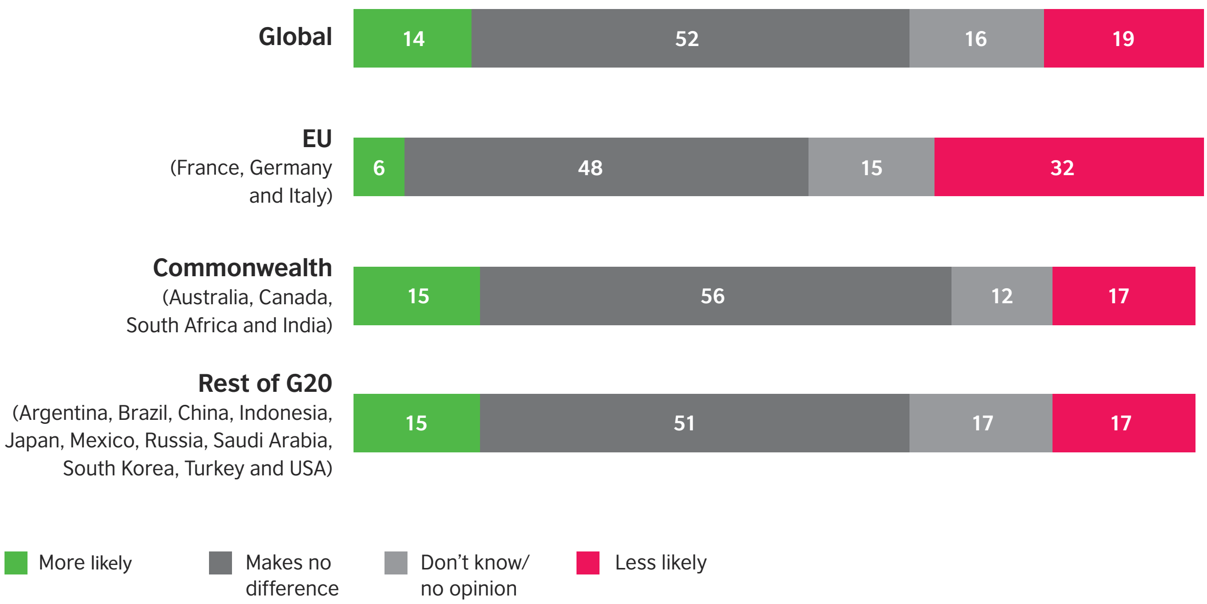
Ultimately it is people's actions rather than just their views that will matter most to the UK's future global prospects. The British Council was keen to develop a better understanding of how exiting the EU might affect people's actual engagement with the UK in the future, particularly when it comes to the likelihood of them choosing to study in the UK, consuming UK arts and culture, pursuing personal connections and ultimately trading with the UK or visiting as tourists. Data and trends for actual behaviour of people around the world in relation to these issues will no doubt emerge in years to come, as the UK forges a future outside the EU. In the meantime the post-referendum survey sought to gather evidence to understand and perhaps help predict whether the departure from the EU would make young people in the G20 more or less likely to want to connect with the UK in future.

DOING BUSINESS AND TRADE

As Figure 15 shows, when asked to consider whether the UK's vote to leave the EU made them more or less likely to do business or trade with the UK, or made no difference, over half (52 per cent) of the survey respondents across the whole of the G20 said it would make no difference. However, more people reported that the referendum would make them less likely to do business or trade with the UK (19 per cent) than reported that it would make them more likely (14 per cent) to do so. This dynamic was much stronger in the EU countries than in the Commonwealth countries and the rest of the G20, with 32 per cent of EU respondents saying they were less likely to do business or trade with the UK and only six per cent saying they were more likely to do so – a net negative impact of 26 per cent. In the Commonwealth and rest of the G20 the net negative effect was much smaller, at just two per cent.

Figure 15: Impact of EU referendum on likelihood of doing business and trade with the UK

After the UK's vote to leave the European Union, are you more likely, less likely or it makes no difference to: do business/trade with the UK



Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010); fieldwork dates: 8 September – 16 October 2016. Data presented here is weighted to relevant national populations.

Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

STUDYING IN THE UK

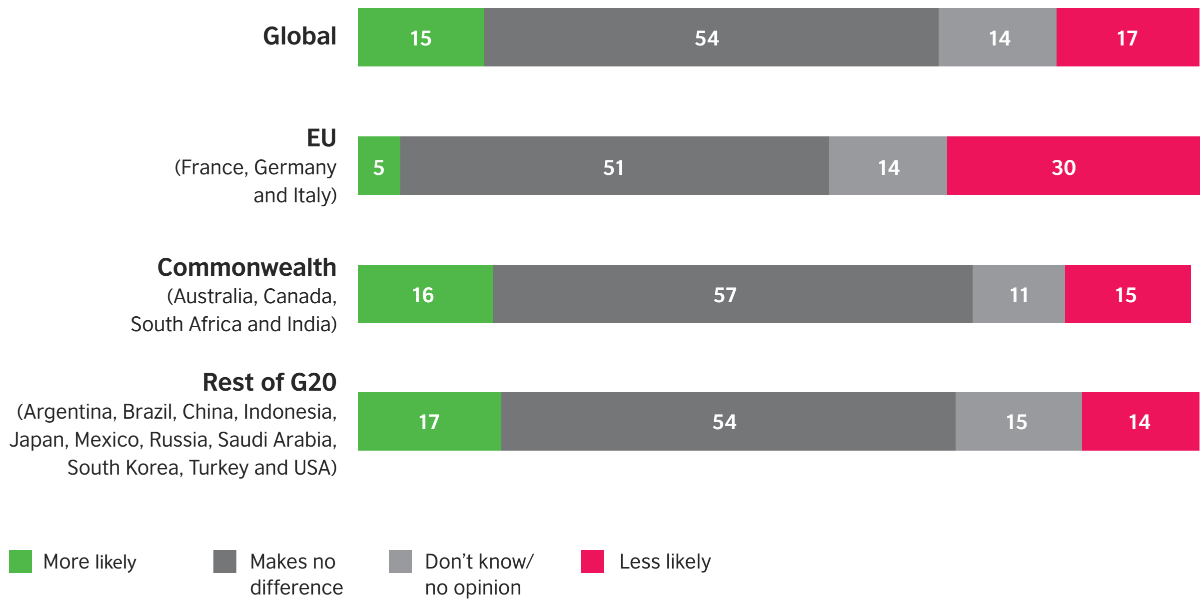
As shown in Figure 16, when asked how the UK's vote to leave the EU would affect the likelihood of studying in the UK, the majority of global respondents (54 per cent) said it would make no difference. However, a considerable proportion (30 per cent) of EU respondents said they were less likely to study in the UK, while only five per cent said they were more likely – a net negative effect of 25 per cent.

In Commonwealth countries 16 per cent said they were more likely and 15 per cent less likely to study in the UK as a result of the referendum. In the rest of the G20, 17 per cent said they were more likely and 14 per cent less likely.

So, while the overall negative net effect across the whole of the G20 sample was small, the effect of the referendum on the likelihood of EU citizens studying in the UK is a cause for concern. The UK received 127,440 students from other EU countries in 2015–16[8].

Figure 16: Impact of EU referendum on likelihood of studying in the UK

After the UK's vote to leave the European Union, are you more likely, less likely or it makes no difference to: study in the UK



Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010); fieldwork dates: 8 September – 16 October 2016. Data presented here is weighted to relevant national populations.
Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

[8] https://www.hesa.ac.uk/news/12-01-2017/sfr242-student-enrolments-and-qualifications

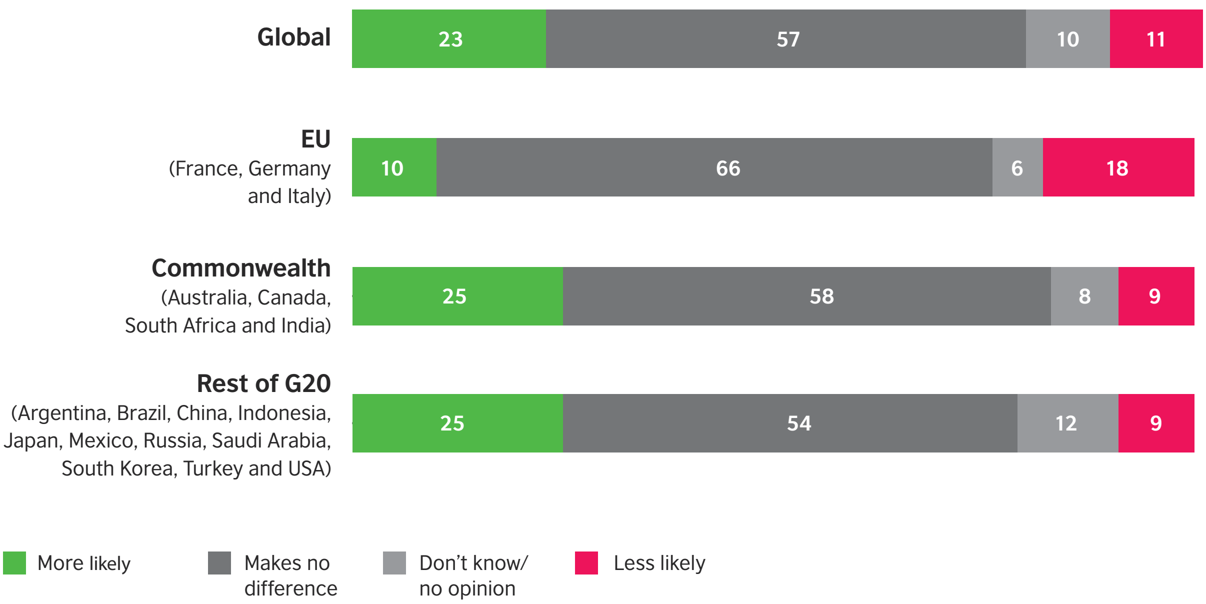
VISITING THE UK

The picture was more positive when the effects of the EU vote on visiting the UK were considered (Figure 17). The survey asked respondents to indicate what impact the UK's vote to leave the EU was likely to have on their visiting the UK. For 57 per cent of global and 66 per cent of EU respondents, it made no difference.

Encouragingly, in the Commonwealth and the rest of the G20 countries a quarter of respondents said they were more likely to visit, while only nine per cent said it made them less likely to visit – a net positive effect of 16 per cent. It should be highlighted that the fall in the value of the pound could be a background factor behind this result, though this does not explain the net negative effect of eight per cent seen in EU countries, where 18 per cent reported that the vote made them less likely to visit the UK, while ten per cent reported it made them more likely to visit.

Figure 17: Impact of EU referendum on likelihood of visiting the UK

After the UK's vote to leave the European Union, are you more likely, less likely or it makes no difference to: visit the UK



Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010); fieldwork dates: 8 September – 16 October 2016. Data presented here is weighted to relevant national populations.

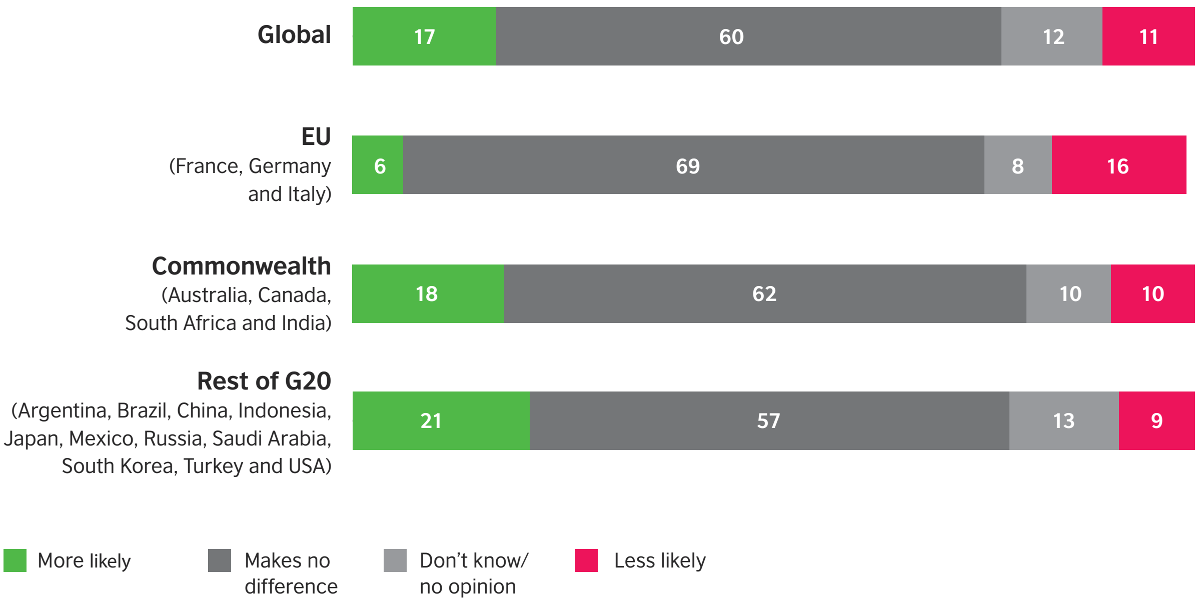
Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

ARTS AND CULTURE

As shown in Figure 18, the impact of the UK's vote to leave the EU on respondents' likely engagement with UK arts and culture is again relatively small. Some 60 per cent of respondents overall and 69 per cent of the EU sample said it made no difference. Again, for the Commonwealth and the rest of the G20 countries in the survey, there was a net positive impact on likely engagement of eight per cent and 12 per cent respectively. Among EU respondents, while it made no difference to the great majority, there was a net negative effect of ten per cent on likely engagement with UK arts and culture.

Figure 18: Impact of EU referendum on UK arts and culture

After the UK's vote to leave the European Union, are you more likely, less likely or it makes no difference to: experience or consume UK arts and culture



Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010); fieldwork dates: 8 September – 16 October 2016. Data presented here is weighted to relevant national populations.

Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

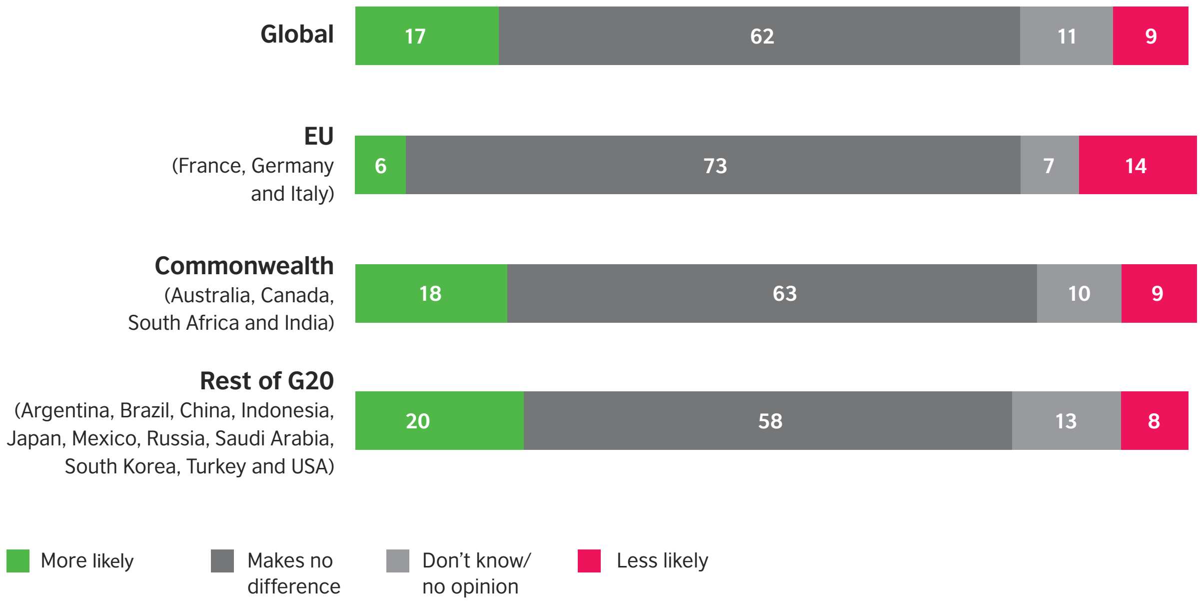
PERSONAL CONNECTIONS

The survey suggests that the likelihood of pursuing friendships with people from the UK was least affected by the vote to leave the EU (Figure 19), with 62 per cent of respondents overall and 73 per cent of respondents in the EU reporting it made no difference.

It is encouraging to see that overall there was a net positive impact of eight per cent. In the EU countries the respondents for whom the vote had a negative impact outweighed the respondents for whom it had a positive impact by eight percentage points, but this was the highest incidence in the survey of 'makes no difference' responses as far as EU respondents' engagement with the UK was concerned. The strength of personal connections is an area where there seems to be opportunities for maintaining and strengthening future engagement.

Figure 19: Impact of EU referendum on likelihood to make friends with people in the UK

After the UK's vote to leave the European Union, are you more likely, less likely or it makes no difference to: make personal contacts and friendships with people from the UK



Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), rest of G20 (11,010); fieldwork dates: 8 September – 16 October 2016. Data presented here is weighted to relevant national populations.

Source: Fieldwork by Ipsos MORI, analysis by In2Impact.

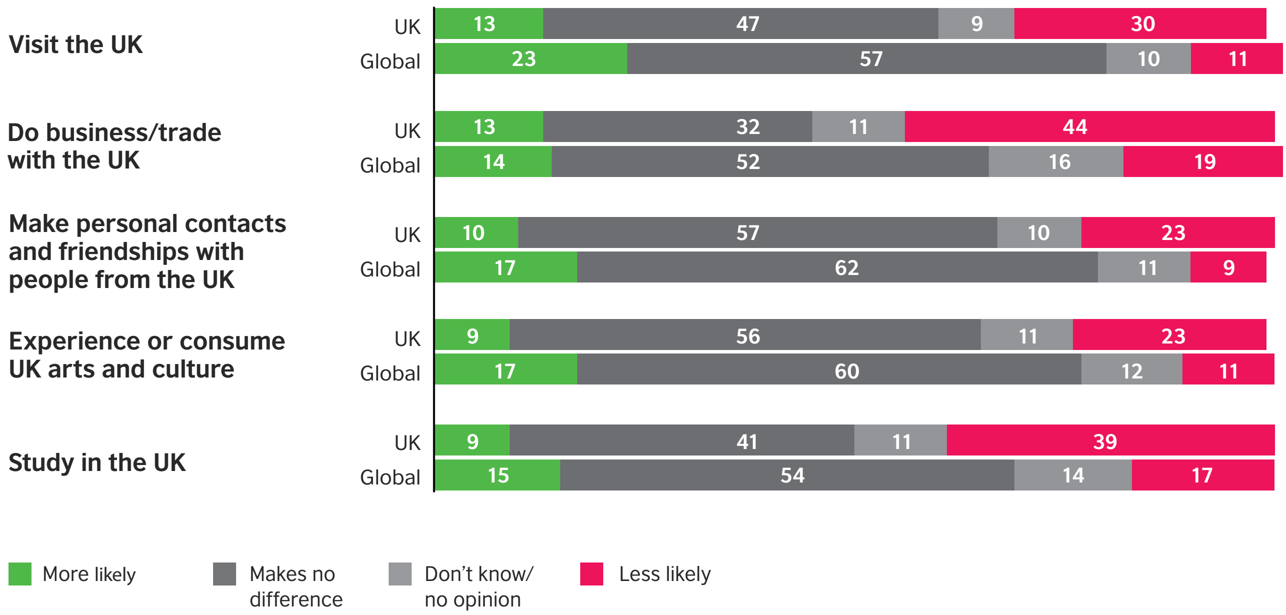
Judging by the results of this survey it is again in the EU countries that the UK could see significant negative effects of the vote to leave the UK on future engagement. And it is in the area of business and trade as well as international students where the picture is most concerning.

In the Commonwealth and the rest of the G20 there was a more positive picture emerging, with a net positive effect of the vote on respondents' likely engagement with the UK. The exception is trade and business, which is clearly a cause for concern.

The UK survey sample was also asked to give its view on what effect the vote to leave the EU would have on people's engagement with the UK. Interestingly the UK respondents had a more negative view than the rest of the G20 across all the types of engagement included in the study: trade, study, arts and culture, personal contacts and tourism (Figure 20).

Figure 20: UK versus other G20 perspectives on the impact of the EU referendum

After the UK's vote to leave the European Union, do you think people are more likely, less likely or it makes no difference to do each of the following:



Base: Global except UK participants (18,010), UK (1,000); fieldwork dates: 8 September – 16 October 2016.
Source: Fieldwork by Ipsos MORI.

IMPLICATIONS FOR THE UK'S FUTURE INTERNATIONAL ENGAGEMENT

The surveys carried out before and after the EU referendum show that on average the UK has maintained its status as an attractive country in the eyes of young people in the months following the vote. Indeed, it appears to have enjoyed a slight increase in its standing as a global power in this period, at least as seen by educated 18 to 34 year olds in these countries (see Figure 7).

The UK enjoys high levels of trust among the young people surveyed in the other G20 countries – British people and institutions even more so than government. It should be noted, however, that there were small but significant declines in trust in people and in government following the vote to leave the EU. This tendency corresponds with other small but negative shifts in perception – related to whether British people value diversity and are open and welcoming, and whether the UK demonstrates tolerance to those with different beliefs and works constructively with other governments.

The UK characteristics that are most positively perceived by the respondents in this survey are some of its institutions – universities and arts and cultural organisations. Indeed, there has been a small but significant improvement in perceptions from the pre-referendum to the post-referendum results.

However, when survey participants are asked to consider the effects of the UK's vote to leave the EU on their perceptions of the UK and intended future engagement, the results reveal a mixture of potential opportunities and risks for the UK across different geographies.

Broadly the greatest potential risks seem to be found within the EU countries, whereas the greatest opportunities appear to point in the direction of the Commonwealth and the rest of the G20. Whether you look at different dimensions of trust in the UK or UK attractiveness, respondents reported a net negative impact of the referendum in the EU. Conversely, there was a net positive effect on views in the Commonwealth and the rest of the G20 countries, giving hope that the door is open to future engagement with the UK.

The same pattern is in evidence in relation to the impact of the referendum on intended future engagement with the UK: young EU citizens indicated a net negative impact, while those in the Commonwealth and elsewhere indicated a net positive effect. This applies in all but one important area: trade. Across the whole G20, the vote to leave the EU had a net negative impact on the perceptions of the likelihood of pursuing business or trade with the UK among the demographic surveyed in this study.

It will be important that the UK considers the views expressed by young people in the EU about the implications of the referendum. Figures from UCAS show that, already, seven per cent fewer EU students are applying to study in the UK.[9] These developments suggest that it would be foolish to take friends in the EU for granted. Ignoring the warning signs would risk a decline in relations with many of the UK's closest cultural, trade and security partners.

Instead, effort and resources now need to be committed to maintaining meaningful dialogue between people and institutions in the UK and the EU, and rebuilding understanding with the people of the EU, especially if the period of negotiations leads to more challenging political relationships over the next two years.

Continuing co-operation and exchange programmes, for example, should be made a priority across culture, education and science. A number of important programmes in this area are currently funded by the EU, and the UK's exit potentially puts its future participation in these schemes at risk. Many of these programmes, from Creative Europe to Erasmus+ to Horizon 2020, may remain open to UK participation after Brexit, and the UK should carefully consider whether it can negotiate such continued involvement.

Judging by this research, friendship with British people and engagement with British culture are forms of engagement less likely to be affected by Brexit among young EU citizens than is the case with business or trade and education engagement. They could prove to be the best channels through which to maintain broad-based positive connections with the EU during a time when debate and negotiation on political, economic and security questions might at times be challenging. However, it should be borne in mind that education connections facilitate these wider cultural connections and personal friendships.

[9] https://www.ucas.com/corporate/news-and-key-documents/news/applicants-uk-higher-education-down-5-uk-students-and-7-eu-students

The Commonwealth group of countries' high levels of trust in the UK and their positive perceptions are striking. Also, to the extent that they are affected by the vote, these are in a net positive direction. Indeed, the vote to leave the EU is associated with a net positive impact on intentions to engage with the UK (except in the area of trade). It can be reasonably assumed that underlying this positivity are the historical personal and cultural ties and similarities in law and institutions, as well as a shared language between the UK and these countries. This offers potential opportunities. This research doesn't answer the question of how best to pursue the opportunities, but the findings suggest that they should be examined further, with priority given to these countries in terms of building stronger, mutually beneficial relationships and connections in culture, education and trade. Perhaps the UK should also consider taking a more active role in working with the Commonwealth, including its governmental and civil society bodies.

In the group of G20 countries outside the EU and the Commonwealth, the levels of trust in the UK are lower. However, levels of trust and attractiveness there are positively affected by the referendum vote. Perhaps from these countries' perspective the vote has been interpreted as an openness on the UK's part for international engagement beyond EU partners and allies and the act of a confident nation setting out an independent and global future. The fact that trade was the only form of engagement in which there is a net negative impact from the referendum suggests that there is a case for building broader bilateral ties, for example through 'softer' engagement, via cultural and personal connections, in order to build a platform for long-term trade and other mutually beneficial relationships to develop.

To help facilitate these important ties, the UK will need to ensure that it maximises its chances of developing these ties. This will require ease of movement for students, academics and creative professionals who want to work together across international boundaries, and increased cultural, educational and scientific partnership, connections and research. People are more connected both virtually and through international travel. This is why the UK must remain internationally open and active if it wants to be relevant and influence decisions on the key challenges of the 21st century and to build the kind of international relationships it will require if it is to develop a new, stronger global role.

Of course, the UK's success on the international stage will not just be down to the attitudes of foreign peoples and governments towards the UK. It also depends on British people's ability to understand and connect with them. This requires the people of the UK to develop the skills to connect globally, including language capacity, an international outlook, knowledge of other countries and an understanding of their cultures and systems. The extent to which British people are able to connect internationally and demonstrate positive characteristics in their interactions with people abroad or foreigners at home will no doubt be reflected in how they are in turn perceived.

It is striking that this survey seems to suggest that young British people have a more negative perspective of the impact of the UK's decision to leave the EU than their peers in the G20 and indeed their peers from across the other EU countries surveyed. By fostering an international outlook and investing in young British people's ability to think and act internationally, it might be possible to turn this pessimism into confidence and active international engagement.

Such engagement could also play an important role in building the international connections that will be essential for a more global Britain. The UK should consider whether and how enhanced cultural and educational ties might create a positive backdrop to the Brexit negotiations and the agreement of future trade deals. It should also consider whether such ties should be strengthened to secure the kind of positive relationship the UK wishes to develop with the countries, institutions and people of the EU after it leaves the union in 2019.

CONCLUSION

The full implications of the departure from the EU on the UK's global relationships will take years to emerge. A smooth transition will reassure international partners and enhance the UK's reputation as a negotiator, while an acrimonious split could cause significant harm, potentially alienating allies and deterring international investors, tourists and students from choosing the UK.

The EU referendum result undoubtedly caused consternation among some of the UK's partners, particularly in Europe – including in many of the countries that are key strategic allies for security issues and international trade.

Understandably, the policy discourse has been dominated by economic considerations, with much debate on the merits or otherwise of a 'soft' versus a 'hard' Brexit. Perhaps more important is whether the UK secures an 'open Brexit'. The sort of Brexit that is able to strengthen as many as possible of the UK's organisational and personal connections with the EU and beyond. Such ties, alongside public opinion, provide the backdrop for interactions around the harder questions of trade deals and security co-operation.

On the other hand, the surveys undertaken for this study reveal an overall rise in the positive perceptions of the UK as a global power, and in intentions to engage with the UK's arts and culture, among G20 countries beyond the EU.

The referendum also highlighted divisions in the UK – between young and old, rich and poor, south and north, urban and rural, and perhaps a threat to the structural integrity of the country itself. Some of the rhetoric before and after the referendum, including the rise in reported incidents of hate crime and their international media coverage, has created the impression abroad that the UK may not be as open and welcoming a country as previously thought.

This report provides a view of the current perceptions of the UK in the G20 in the aftermath of the referendum and is intended to give the UK government and its culture and education sectors a starting point on which it can build a fuller picture of strengths and weaknesses, opportunities and risks.

The UK has voted to leave. But the manner of leaving and the future model for the UK's relationship with the EU will both be significant for its reputation and influence. The vote itself has had a subtle but significant effect on attitudes to the UK in the G20.

The UK will undoubtedly need to make some tough choices to secure the country's global standing for the future. There is a need for shared vision, greater investment and a willingness to pursue joint action, involving government as well as non-government actors in order to achieve the impact necessary to make a lasting difference in the EU, in the Commonwealth, and in the most significant economies in Asia and the Americas.

Protecting the UK's democracy, civil society, prosperity and openness is an imperative for this country, in terms of the success of its own people. These qualities continue to be used powerfully in establishing new connections and maintaining old relationships for the UK as a whole, regardless of the structures for governing its relationships with other countries. Indeed, the UK has a long track record of demonstrating openness and sharing the best of its pluralistic and democratic society with the world for mutual benefit. It must continue to do so.

RECOMMENDATIONS

It is how the UK proceeds from this point that will have a lasting impact on its global reputation. This study suggests that there are opportunities as well as risks.

Confidence, openness, and optimism– as well as realism – among the UK's people, institutions and government are prerequisites for success.

In pursuing the vision of a globally connected country the UK must:

1. Ensure that its foreign policy is informed by the best available data on sentiments towards the UK around the world, and an understanding of the UK's internationally perceived strengths and weaknesses.
2. Appreciate how well the UK is perceived internationally and why, and be strategic in nurturing its soft power strengths as it pursues relationships once it is outside the EU.
3. Provide opportunities for personal friendships to be developed and cultural exchange to flourish by maintaining and growing future connections in the EU.
4. Scale up personal, scientific, educational and cultural exchange as a powerful means of establishing stronger ties with partners in the Commonwealth and other major global economies. This softer engagement could also over time help build a platform for more trade.
5. Address the lack of confidence among young British people, suggested by the fact that they are more negative than their G20 peers about the impact of the UK's vote to leave the EU. Young Britons must be supported to develop global awareness and get exposure to other countries, cultures and languages through the education system, in the workplace and via civil society.
6. Put in place the systems necessary for open and successful engagement with the countries of the EU and globally, which are dependent on a reasonable ease of movement of students, researchers, academics, artists and creative professionals and, perhaps most importantly in the long run, for young people.

APPENDIX

The two surveys underpinning this publication were undertaken between 23 May and 16 June 2016, and 8 September and 16 October 2016 by Ipsos MORI on behalf of the British Council. The first survey was conducted before the British public voted in a referendum, on 23 June 2016, on whether or not to remain a member of the EU. Analysis of the data was provided by In2Impact.

The 19 countries surveyed by Ipsos MORI were Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, Russia, Saudi Arabia, South Africa, South Korea, Turkey, the United Kingdom and the United States of America. All countries are members of the G20; the 20th member of the G20 is the EU.

The attractiveness of each country was assessed excluding respondents from that country. In each country, the sample included around 1,000 18 to 34 year olds who had a minimum of secondary education. Ipsos MORI conducted the surveys among online panels in these countries in the local languages. The data was weighted on gender and age to reflect the national population profiles.

Additionally, the post-referendum sample was weighted to match the sample profile of the pre-referendum survey on the following variables: interlocking age and gender quotas, education (secondary and tertiary education), area of residence (urban, semi-urban and rural) and employment status (studying, employed or other/neither). This weighting was intended to minimise a possible sample bias and to allow for greater comparability.

Participants who took part in the pre-referendum survey were not eligible to take part in the post-referendum survey, with the exception of eight in the UK, who were included to ensure sufficient participant numbers from Wales and Northern Ireland. Where results do not sum to 100 per cent, this may be due to computer rounding, multiple responses or the exclusion of 'Don't know' categories.

Questions on levels of attractiveness (Figures 1–2), trust (Figures 3–6) and agreement with statements on perceptions of UK characteristics (Figure 7) were all rated on a scale of 0–10, where 0–4 = unattractive/distrust/disagree; 5 = neither; 6–10 = attractive/trust/agree respectively.

COUNTRY	WEIGHTED SAMPLE BASE
Argentina	1,002
Australia	1,001
Brazil	1,000
Canada	1,000
China	1,002
France	1,002
Germany	1,000
India	997
Indonesia	1,008
Italy	1,000
Japan	1,000
Mexico	1,001
Russia	1,000
Saudi Arabia	999
South Africa	1,000
South Korea	997
Turkey	1,001
United Kingdom	1,000
United States of America	1,000
TOTAL	**19,010**

STATISTICAL SIGNIFICANCE OF THE ANALYSIS

The individual sample size for the research in each country was just over or under 1,000. Where the UK is excluded and combined data from the other 18 countries is shown in this report, the combined weighted sample is 18,010, and where combined, the 19-country sample size is 19,010.

This publication provides a comparison between the research findings of the pre-referendum and post-referendum surveys. Differences in the data can appear due to random variations in the sample that we draw. However, a significance test gives an indication of the strength of the difference seen in the data, relative to the natural variation expected when working with samples of this size. Due to the large base sizes reported, only a small change in the data is needed for results to show as significantly different. In some cases, figures that appear to be the same will show as significantly different – this is due to rounding. Statistically significant data shifts, at a 95 per cent confidence level, are clearly indicated with an arrow showing the direction of the data movement.

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