



British Foreign Policy Group

UK Public Opinion on Foreign Policy and Global Affairs Annual Survey – 2022

Sophia Gaston

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The 2022 Survey

This report presents the findings of the 2022 Survey on UK Public Opinion on Foreign Policy and Global Affairs, authored by the BFPG and with the fieldwork conducted with Opinium Research on 8-21 February 2022 (sample of 2,000 UK adults, weighted to be nationally representative). This annual survey is an enduring partnership between the BFPG and Opinium, which has thus far produced three annual surveys and two interim snap surveys to date. Both organisations recognise the growing importance of public opinion on foreign policy and are committed to supporting further studies into this valuable area of social and political research.

The British Foreign Policy Group



The British Foreign Policy Group (BFPG) is an independent, non-partisan think tank dedicated to advancing the UK's global influence, at a crucial time in the nation's modern history. Our core objective is to bridge the link between the domestic and international spheres – recognising that Britain's foreign policy choices are shaped by our social, economic and democratic landscape at home. Our mission supports Britain as a strong, engaged and influential global actor. We promote democratic values, liberal societies, and the power of multilateralism – and we recognise Britain's critical international responsibility to uphold and extend these throughout the world. The BFPG believes that a strong and united nation at home is the essential foundation of a confident and effective British foreign policy.

The Author

Sophia Gaston is the Director of the British Foreign Policy Group. She is a social and political researcher, whose research particularly explores threats to governance and strengthening resilience in advanced liberal democracies. Through the British Foreign Policy Group, she works to support the advancement of the Global Britain agenda through a particular focus on the integration of domestic and international policy-making, the reinvigoration of Britain's international relationships, and the harnessing of social research as a tool of strategic foreign policy foresight. Sophia is a Research Fellow in the Institute for Global Affairs at the London School of Economics and Political Science, and an Academic Fellow at the European Policy Centre in Brussels.

sophia.gaston@bfpg.co.uk

Opinium Research



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Acknowledgements

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Introduction

The BFPG's Annual Survey on Global Britain and UK Foreign Policy has charted the dynamic period of the nation's departure from the European Union, as well as seismic shifts in the international role and posture of the United States and the growing influence of a rising China. This year, the survey was undertaken in the spectre of the Russian invasion of Ukraine – yet another dramatic development in a turbulent decade, with profound consequences for European and global security.

Public opinion on foreign policy has not traditionally been afforded the credence it deserves as an instrument of building domestic public consent and as a tool of strategic foresight through which to understand the social and political strengths and weaknesses of our allies and strategic rivals. This Annual Survey, which continues to expand and deepen as a landmark project with our fieldwork partner Opinium, makes clear the central role that foreign policy attitudes will play in shaping the UK's choices on the world stage. It highlights areas of national consensus and profound areas of divergence between different social groups, regions and demographics, as well as both the areas in which the UK Government's strategic framework is backed by the legitimacy of public consent and the policies for which leadership will be needed to cultivate support.

The war in Ukraine is a generational event shaping public opinion in real time, and therefore the BFPG will continue to undertake additional surveys and focus groups throughout this year and beyond to understand the evolving perspectives Britons hold regarding the myriad implications of Russia's brutal invasion. The focus groups we have been conducting over the past six months have made clear that the emergence of a conflict with such proximity within our own European neighbourhood has compelled citizens to confront many trade-offs that otherwise sit in an abstract and hypothetical realm. In the meantime, this survey enables us to examine longer-term, structural trends in British public opinion, and to highlight the areas that will need to be prioritised in terms of both policy construction and communication, as the UK Government moves forward to implement the expansive ambitions of its Global Britain agenda.

Overall, we find a nation in a state of transition, moving between the twilight of the fractious Brexit debates, and into the realities of the UK's new independent status in a volatile geopolitical climate. The British people emerge from this emotive period of upheaval a little battle-weary, with perceptible impacts on their understanding of alliances, their belief in the powers of globalisation, and a degree of disillusion about the moral framework underpinning the liberal world order. There is a sense that the lasting effect of the pandemic will be to encourage nations to be more focused on sovereignty and less connected, and that the United States' domestic instability will necessarily encourage its leaders to focus inwards. More positively, it is clear there is a strong basis of public consent underpinning many aspects of the UK Government's international values agenda, including the UK's global climate leadership and the various Hong Kong, Afghan and Ukrainian visa pathways schemes brought to life in the past year. In addition, Britons recognise that even with some of the emotional weight falling out of our alliances, collective cooperation remains a fundamental source of resilience, and they are more inclined to say that they feel a sense of pride in the UK's foreign policy choices than to not.

The relatively low prominence now afforded to the Brexit debate in the UK's political sphere has diminished some of the more striking impacts this national conversation has had on British public opinion; in particular, the dynamic domestic and international identities associated with Brexit have become somewhat less salient, although with a European identity now firmly embedded – in part because it is the most well-understood identity. The 'Global Britain' project is itself poorly understood, particularly compared to the domestic story of 'Levelling Up', and there is clearly an opportunity to tell the story of the nation's international agenda with more proactive energy and focus. The more concerning aspects of the survey findings should compel renewed enthusiasm for engagement with the British people and helping them to understand

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the complexity of the choices being made in their interest. Equally, there is no room for complacency that the positive foundations of trust, support and goodwill will remain enduring over the coming years – with the dynamism experienced in our annual surveys over the past five years an indication of the capricious public opinion climate.

What is clear is that the domestic and international stories of modern Britain must be brought together in a cohesive manner. Doing so provides tremendous legitimacy to our voice on the world stage, enables us to be more ambitious with our plans, and to lead and persuade others to achieve them. There are several areas that should be regarded as particular risks in terms of the potential for emergent tensions around the allocation of domestic and international resources – specifically, the transition to net-zero during a cost-of-living crisis, the restoration of the 0.7% GNI international development spending commitment, and the generous refugee and visa pathway schemes being deployed as foreign policy instruments. The Indo-Pacific tilt, the rationale for which is not especially well-understood by citizens, will also need a convincing narrative to make the case for scarce funding and energies to be directed to a region lacking fundamental geographical proximity. Each of these policy areas has the potential to be presented as an opportunity to enhance the UK's prosperity and security, and the British people are typically more receptive to this form of strategic framing, but these arguments need to be crafted and consistently made.

The value of the data laid bare within this survey, and the many focus groups the BFPG has conducted around the length and breadth of the nation, should be self-evident. It enables all those with a stake in the UK's foreign policy to understand the structural environment in which choices are being made and, when harnessed effectively, to proactively anticipate and address any emergent social and political weaknesses and tensions that can and should be addressed. The utility of social research as a tool of strategic foresight is an argument that is slowly being advanced, but still needs to be won in many areas of our policy-making apparatus. As ever, I hope that the publication of this survey will help to break down the hard walls we had established between foreign policy and the lives of the citizens whose interests it serves.

Sophia Gaston
Director of the British Foreign Policy Group
May 2022

Executive Summary: Key Findings

Mobility, Identities and Engagement

- Travel remains extremely depressed two years after the beginning of the coronavirus pandemic, which means large swathes of the population have not been exposed to the important shaping effects of lived experiences of mobility. This may have longer term consequences for British instincts regarding international affairs.
- The relative diminishment of the Brexit issue as a central theme of UK politics has had marked implications for the salience of international identities, which have tended to become less resonant, and for the wider interest the British people hold in international affairs. This reinforces the unique domestic-international hybrid of the Brexit era and the dynamism this provoked in Britons' visceral understanding of the nation and its role in the world.

The Global Britain Project

- Despite the very turbulent domestic political environment over the months preceding the survey fieldwork, which had influenced wider trust in and support for the UK Government, trust in the Government to make foreign policy decisions in the national interest has remained steady.
- Britons are somewhat more likely to express pride in the UK's role in the world (43%) than to express a lack of pride (40%), with men, older Britons, and Conservative and Leave voters the most likely to say that they are proud of British foreign policy.
- More than a quarter (27%) of Britons have never heard of the term 'Global Britain', which is ten percentage points higher than the proportion of the population who have not heard of 'Levelling Up'. Only 12% of Britons believe they fully understand the meaning of Global Britain, and they tend to be the most economically and socially secure citizens.
- The UK's global reputation is seen by Britons to have been boosted by the nation's pandemic response – which, focus groups suggest is largely predicated on the vaccine development and roll-out processes – as well as the decision to join the AUKUS alliance pact, and the leadership role the UK has been playing in supporting the defence of Ukraine from Russia's invasion.
- By contrast, the choice to leave the European Union, the UK Government's temporary foreign aid spending reduction, and the nation's role in the allied Afghanistan withdrawal, are all seen by the British people to be more negative developments for the UK's international soft power. These observations do not mean that Britons necessarily agree with these perceptions, but that they are attuned to these being seen as controversial outside of the UK.

The UK's Alliances

- Of our allies, Germany (63%) is seen as the most trustworthy nation in terms of its capacity and willingness to act responsibly in the world, above France (55%) and the United States (51%). India is seen as a more complicated ally, commanding just 27% of Britons' trust, and it appears to have experienced a deterioration in its reputation over the past year. China and Russia continue to stand distinct in their framing as our primary strategic rivals, with 81% of Britons actively distrusting China to act responsibly in the world, and 91% of Britons distrusting Russia.
- The United States remains Britons' choice as the UK's closest ally (42%). The strategic utility of the UK's relationship with the US is well-understood, and there is a recognition that there are some important common values underpinning this partnership.

Executive Summary: Key Findings

- However, a majority of Britons believe the instability in American politics over recent years has fundamentally weakened this alliance, and that America's fragile society and democracy will compel its focus inwards for the near future. A large plurality of Britons also believe that America's global power is in decline relative to that of China.
- Britons support a wide range of cooperation areas with the EU, with the most popular being to reduce trading barriers, to facilitate freedom of movement of people, research and academia, and both regional and global foreign policy cooperation. Only a tiny fraction of Britons reject all forms of cooperation, although a fifth of Britons are unsure about their preferences.
- When forced to make a choice between the US and the EU, Britons are less likely to consider the EU our most important relationship than they were a year ago. This may reflect a sense that the potential disruption from Brexit was anticipated to be more profound, to capture the particularly tense current relationship with France, or to indicate a 'Biden bounce' in the UK-US partnership.
- A significant portion of the British population (29%) believes the UK does not have any particularly close allies – a view held most commonly among women, older Britons, and those with low levels of political engagement.
- While Britons are clear that international relationships and cooperation do, on balance, make the UK more resilient (67%) – a fifth of Britons are unsure. There is a strong relationship between economic security and internationalist instincts, and the propensity to regard collaboration as a source of resilience.

Globalisation and Trade

- Recognition of the benefits of globalisation have declined significantly, both in terms of the perceived benefits to the UK as a whole, and to areas outside of London. This is a substantial change that has not been captured in previous surveys, and likely reflects the cut-through of the discourse around the Levelling Up agenda, the pandemic's effect on perceptions of place, and the broader concerns around the growing cost-of-living crisis.
- The two most important factors Britons wish to see emphasised in the UK's pursuit of free trade agreements are to uphold the nation's high environmental, animal welfare and food standards, followed by bringing benefit to the UK economy as a whole. These are considerably more popular choices than trading with nations that share our values, or providing greater choice and competition to British consumers.
- Migration has become an increasingly important instrument of UK foreign policy. A majority of Britons support both the Hong Kong and Afghanistan citizenship pathway schemes, with the support for allowing safe passage for allied support personnel in Afghanistan slightly more popular than the Hong Kong BN(O) scheme. Economically and socially secure Britons are the most supportive of both these schemes. The BFPG's focus groups suggest that there is scant understanding of the scale and success of the take-up of the Hong Kong BN(O) programme.
- There is no clear consensus about the best means of responding to the migration crisis in the English Channel, however the most popular option is to facilitate offshore processing of arrivals.

The International Order

- Britons believe there will be a range of lasting impacts from the pandemic, with the most clearly recognised being international governments on-shoring supply chains, imposing tougher ongoing border restrictions, and toughening their stances on China. A majority of Britons also believe that more preparations will be made for future health emergencies, and that nations will turn more insular and focused on domestic issues. A large plurality (46%) also think wealthier nations will work more closely with developing nations to ensure collective wellbeing.

Executive Summary: Key Findings

- With the Government having temporarily reduced the UK's 0.7% of GNI development commitment during the pandemic, the largest single group of Brits (34%) believe that the UK's development commitments should remain reduced. A further 24% believe the 0.7% GNI development commitment should only be restored when HMG finances reach their pre-pandemic level – as the Government has indicated – and 17% wish for it to be restored now.

National Security

- The three most prominent security threats perceived by Britons are, in order, climate change, terrorism, and the rise of China as a world power.
- The UK Government and the British people have become increasingly attuned to the risks posed by China to the UK's national interest and the world order over recent years. While Britons are, on balance, more likely to believe that Russia (26%) is the UK's principal security threat than China (14%), a large plurality of Britons (45%) now regard them as equally dangerous rivals.
- Views on the UK's engagement with China have remained consistent over recent years – with Britons largely favouring the UK prioritising challenging China on its human rights record, collaboration on climate change, research cooperation and academic exchange. Less than a fifth of Britons support any form of economic engagement with China.
- Britons remain sceptical of the UK being involved in any form of military engagement and only support a fairly limited scope of scenarios for which the armed forces could be deployed, which mainly emphasise direct attacks on British soil or on British assets.
- While there is a recognition of the need to have withdrawn from Afghanistan in the summer of 2021, the largest group of Britons (40%) feel that earlier preparations should have been made to ensure it was more orderly and all personnel could be evacuated safely. Just 19% of Britons believe the UK should have maintained a presence in Afghanistan beyond the withdrawal date.

Climate Change and the Net-Zero Transition

- Support for the UK's international climate action leadership remains robust, and is backed by two-thirds of Britons.
- It is, however, assumed that the UK's leadership on climate action will mean the UK will need to make its own domestic transition on net-zero at a faster pace than our peers.
- This will have domestic political consequences, as a majority of Britons believe the costs of this transition to net-zero will be greater for the disadvantaged than the wealthier in society.
- Interestingly, it is Britons from higher socio-economic backgrounds and/or with advanced education levels who are the most likely to be concerned about the asymmetrical social impacts of the net-zero transition, largely because the Britons perceived to be most vulnerable to these impacts are less confident and informed about their opinions on this subject.

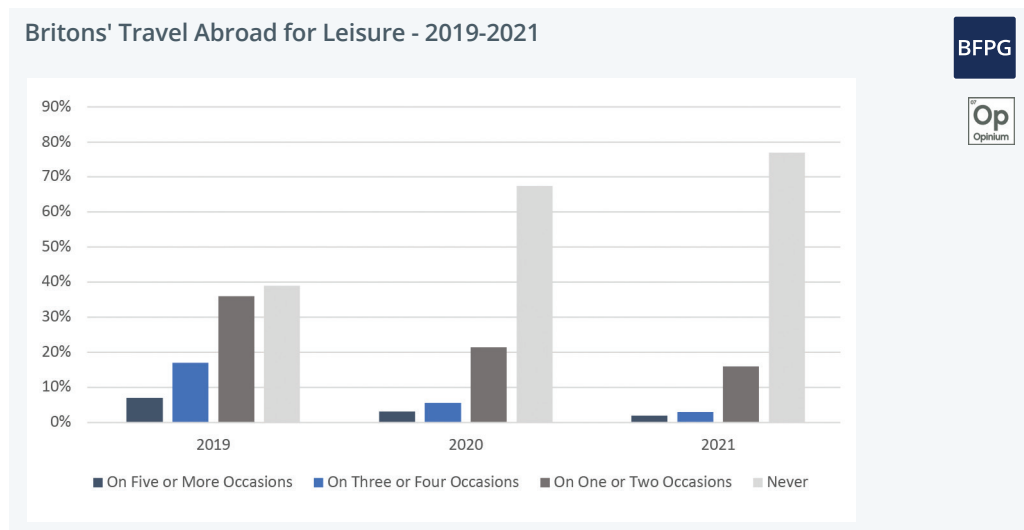
Mobility, Identities and Engagement

Foreign Travel

Foreign travel patterns remain significantly depressed by the coronavirus pandemic, with no perceptible bounce in the proportion of Britons travelling abroad. In 2021, only a fifth (21%) of Britons travelled abroad for leisure. Among those who did travel, the largest proportion only travelled infrequently, with 16% of Britons travelling abroad on one or two occasions, 3% on three or more occasions and 2% travelling on five or more occasions. This represents a sharp decline in foreign leisure travel from 2019 in which 60% of Britons travelled abroad for leisure. As noted in our previous annual survey reports, the dramatic decline in travel participation during the pandemic may well have longer-term social and political effects, as lived experiences of travel can be closely correlated with broader instincts on internationalism and other policy preferences.

Mirroring distinctions in travel patterns seen in previous surveys, particularly during the pandemic, it is the younger, more highly educated and economically secure Britons who are the most likely to have travelled abroad last year. For example, under-35s (38%) are twice as likely as 35-54-year-olds (19%) to have travelled abroad in 2021 and significantly more likely than over-55s (11%) to have done so. Similarly, Britons in higher (ABC1) socioeconomic groups (25%) are ten percentage points more likely than those in the C2DE social grade (15%) to have travelled abroad in 2021.

There are also significant differences in travel patterns across the devolved nations of the UK, with residents in Northern Ireland (34%), significantly more likely than residents in Scotland (22%) and Wales (13%) to have travelled abroad in 2021. However, there are also notable disparities within England, with residents in London (41%) significantly more likely than residents in any other English region to have travelled abroad in 2021, and more than four times as likely to have travelled abroad in 2021 than residents in the South West (10%). In turn, Britons living in urban areas (32%) are twice as likely as those living in suburban areas (16%), and more than twice as likely as those living in rural areas (13%) to have travelled abroad in 2021.



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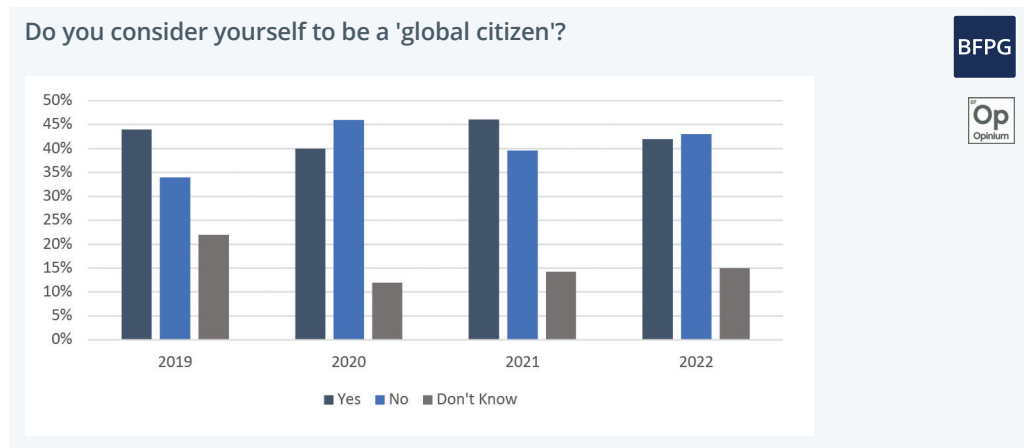
International Identities

As the fractious public debate around the UK's membership of the European Union began to fade in its potency and dominance of the political agenda, the British people are undergoing an evolution in their international identities. One of the most striking effects of the Brexit referendum was the activation of terminology cleaved onto the domestic social and political identities at stake, with the previously fairly loosely held identities of being 'European' or a 'global citizen' or a 'patriot' becoming both more popular to hold and actively reject. This year, we see the further evolution of these identities, with a year having passed since the UK's formal departure of the European Union. Overall, the trend is of a partial reversion to the pre-Brexit state of affairs, with the passion behind these identities diminishing to some extent. The exception is the European identity, which remains robustly held by a considerable segment of the population – in part, standing out against the other terminologies because it is most widely understood. We can expect further evolution in these identities over the coming years, but it appears to be the case that the decision to part with the European Union has focused minds on the subject of geography – a phenomenon intensified by the pandemic and the recent invasion of Ukraine. Global Britain, the project spawned in the aftermath of the decision to leave the European Union, therefore moves into its actualisation during a period in which Britons are more conscious of and more strongly connected to a European identity.

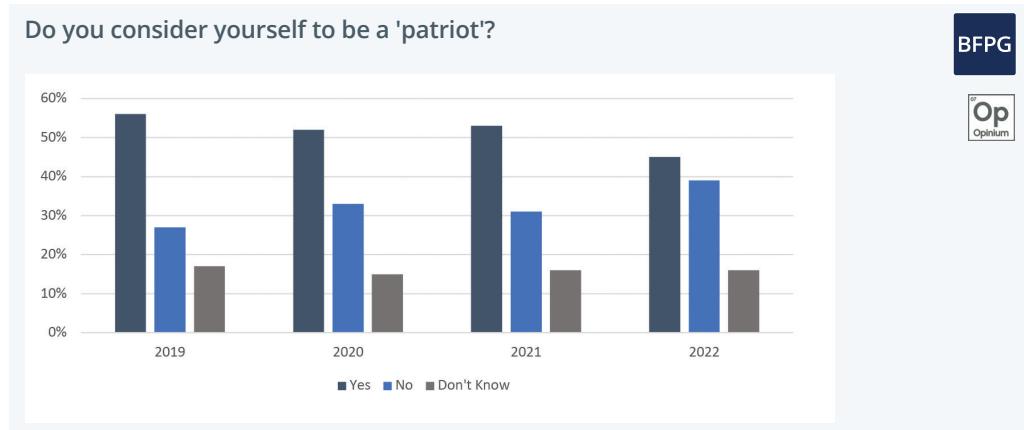
Global Citizenship

Britons remain sharply divided in their willingness to identify as a 'global citizen'. After a temporary increase in 2021, in which 46% of Britons identified as global citizens, affiliation with the term has now returned to 42%. Britons are now, very marginally, more likely to not identify as a global citizen (43%) than to identify as one (42%). However, active levels of rejection of the term remain lower than those seen in the January 2020 survey, when the Brexit debate remained fresh (46%).

Younger Britons continue to be the most likely to identify as global citizens, and are the only age group which is more likely to adopt the term (52%) than reject it (30%). In comparison, 52% of over-55s reject the term 'global citizen', and only 35% identify with it. Education levels also impact Britons' willingness to identify as global citizens, with 53% of graduates identifying as such, compared to 35% of non-graduates. The concept of global citizenship is most resonant amongst Liberal Democrat voters (60%) and Labour voters (55%). A large plurality of SNP voters (45%) also identify as such, with 41% of SNP voters rejecting the term. However, the majority of Conservative voters (57%) do not identify as a global citizens, and only 31% of Conservatives do identify as such. Britons who voted Remain in the 2016 referendum (57%) are also twice as likely as those who voted Leave to identify as a global citizen (28%). The parameters of identity as contained within or extending beyond the nation state are therefore intrinsically linked to the political realignment that has been taking place in British politics over the past decade and are likely to remain an important factor in shaping political decisions around foreign policy for a generation.



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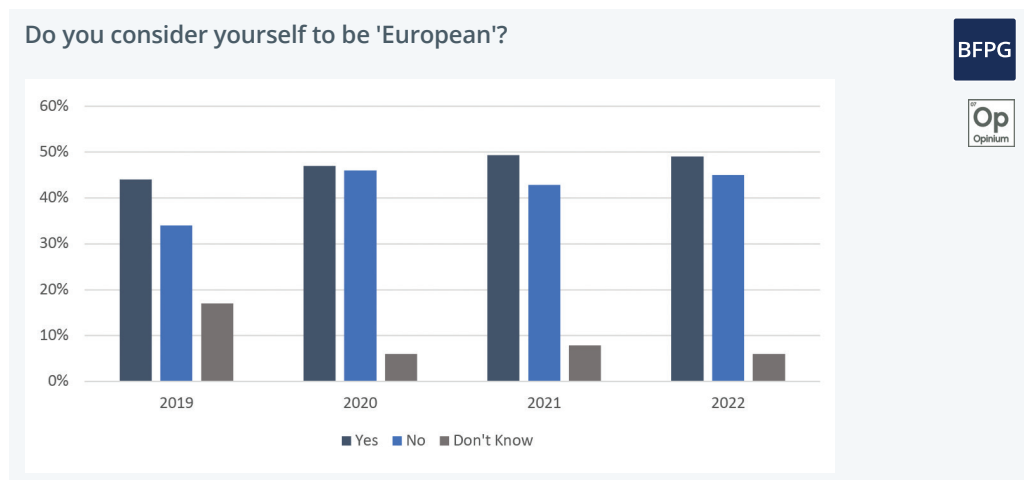
Patriotism

Although Britons are slightly more likely to identify as a patriot than a global citizen, patriotic identification has fallen over the last year. For the first time since we began surveying this specific term in 2019, it is no longer the case that the majority of Britons identify as patriots. In fact, affiliation with the term has fallen eight percentage points in the last year, from 53% to 45%. In turn, 39% of Britons would not consider themselves to be a patriot, while 16% of Britons are unsure as to whether they would identify as such.

Older Britons remain significantly more likely to identify as a patriot than younger Britons, with 64% of over-55s identifying as such, compared to 35% of 35-54-year-olds and 30% of under-35s. In turn, a majority of under-35s actively do not identify as patriots (54%). Significant geographical divergences also exist, particularly across the UK's devolved regions, with residents in Wales the most likely of residents of any region of the UK to identify as patriots (56%). Meanwhile, residents in Scotland (39%) and Northern Ireland (25%) are the least likely of residents of any UK region to identify as patriots, indicating the complexity of the 'four nations' settlement and the nationalist dynamics within the United Kingdom. Conservative voters (66%), particularly Conservative-Leave voters (69%), are the most likely to identify as patriots, followed by Liberal Democrat voters (48%). At 37%, Labour and SNP voters are the least likely to identify as patriots.

European Identity

European identity remains contested, with 49% of Britons identifying as European, and 45% of Britons not identifying as such. Britons are notably more confident in their views on their European identity than any other identity, with only 6% of Britons unsure as to their position.



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In comparison, 16% of Britons are unsure whether they would identify as a patriot and 15% are unsure whether they would identify as a global citizen. Levels of European identity have also remained more stable during the pandemic compared to other identities.

European identity is correlated with education, political alignment and EU referendum positions, with graduates (60%), under-35s (57%), readers of The Guardian (72%) and The Independent (71%), Remain voters (70%), Liberal Democrat voters (75%) and Labour voters (66%) the most inclined to identify as such. However, it is worth noting the sizeable groups of other citizens who also identify as European, including non-graduates (43%), over-55s (45%), readers of The Sun (49%), the Daily Mail (46%), and non-newspaper readers (42%). Political affiliations are the most singularly polarised characteristics when it comes to European identities, with Conservative and Leave voters substantively less likely to identify as European than any other group of citizens. Nonetheless, 35% of 2019 Conservative voters and 30% of 2016 Leave voters continue to see themselves as European – a sizeable contingent worthy of political attention.

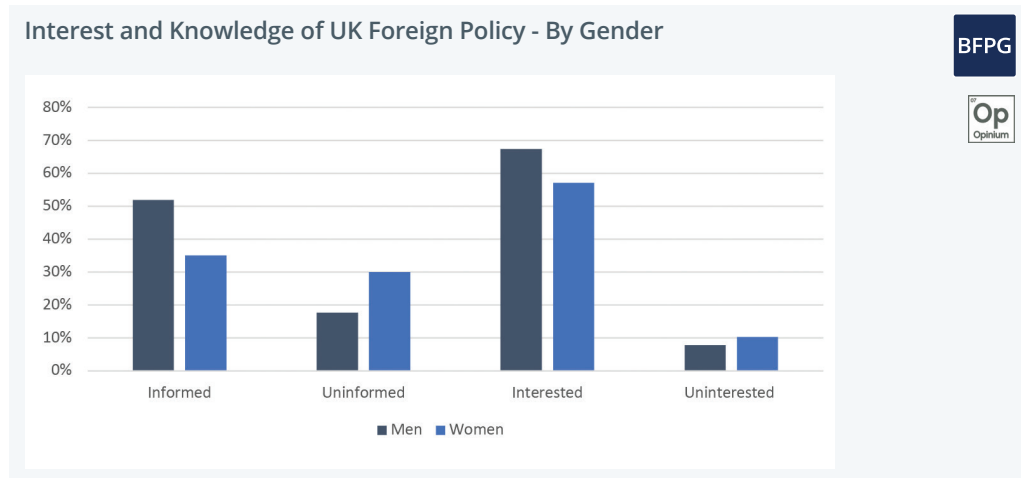
Engagement with UK Foreign Policy

Interest in the UK's International Activities

Engagement with foreign affairs in the UK has been inflated considerably by the Brexit referendum, and as the country settles into a 'new normal', we can already observe a softening of the outsized levels of interest in UK foreign policy. It should be noted that this survey was undertaken just before the Russian invasion of Ukraine, and we can expect some degree of volatility on this question, which we will continue to monitor.

Overall, in 2022, 62% of Britons say they are interested in what the UK does internationally, with 26% of Britons very interested in this. And although a reasonable proportion Britons are relatively ambivalent, with 29% of Britons neither interested nor uninterested, only 9% of Britons are actively uninterested in what the UK does internationally. At the start of 2020, levels of interest in the UK's international activities stood at 77%, up from 65% in 2019 and 58% in 2017. However, in 2021 levels of interest fell to 71% and this year levels of interest have fallen a further nine percentage points to 62%.

Turning to demographic divisions and graduates (76%) are more likely to be interested in the UK's international activities than non-graduates (54%), as are men (67%) relative to women (57%). Furthermore, readers of the Financial Times (92%), The Times (85%) and the Daily Telegraph (85%) display the highest levels of interest in UK foreign policy, while readers of



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The Sun (64%) are the readership least likely to be interested. However, it is those who do not regularly read a newspaper who are by far the least likely to be interested in what the UK does internationally (49%). Interest in foreign policy also closely mirrors wider levels of political attention, with those with high levels of political attention (88%) significantly more likely to be interested in what the UK does internationally than those with mid-level (62%) or low levels (21%) of political attention.

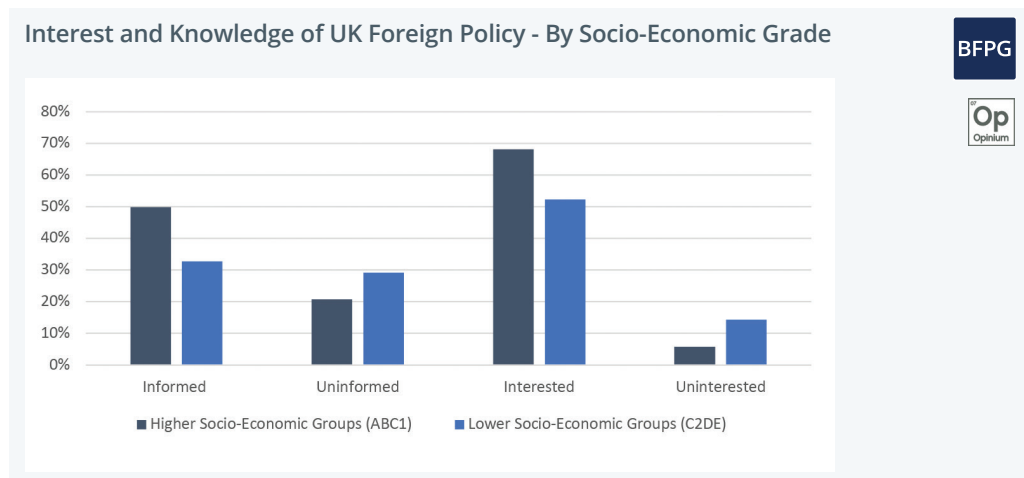
Self-Reported Foreign Policy Knowledge

This decline in levels of interest in the UK's international activities is mirrored by a decline in levels of self-reported knowledge of UK foreign affairs. This may well reflect the diversification of foreign policy narratives, as the all-consuming Brexit debate – of which citizens felt they had a direct stake – has been eclipsed to some extent by rising concerns about China, Russian aggression, the withdrawal from Afghanistan, and the UK's hosting of the COP26 and G7 Summits.

It is no longer the case, as it was in 2020 (58%) and 2021 (57%) that the majority of Britons feel informed about the UK foreign policy, with just 43% of Britons feeling informed about UK foreign affairs in 2022. In turn, the proportion of Britons who feel actively uninformed about the UK's international activities now sits at 24%, up from 14% in 2021 and 12% in 2020. A further 33% of Britons feel neither informed nor uninformed. Furthermore, the gulf between levels of interest and self-reported knowledge on foreign policy has grown. In 2021, this disparity stood at 14 percentage points, with 71% of Britons being interested in the UK's international activities and 57% feeling informed. This has now risen to 19 percentage points, with 62% of Britons expressing interest in the UK's international activities but just 43% feeling informed about them.

This disparity between levels of interest and self-reported levels of knowledge is particularly sharp among women, and among over-55s, both of whom have a 22-percentage-point disparity between levels of interest and levels of self-reported knowledge.

Overall, men (52%) are 17 percentage points more likely to feel informed about UK foreign affairs than women (35%), as are Britons in the ABC1 social grade (50%) relative to those in the C2DE social grade (33%). Politically, Conservative-Remain voters (55%) are the most likely to feel informed about UK foreign affairs, followed by Labour-Remain voters (53%) and Conservative-Leave voters (47%). With just 32% describing themselves as feeling knowledgeable about foreign affairs, Labour-Leave voters display the lowest levels of confidence.

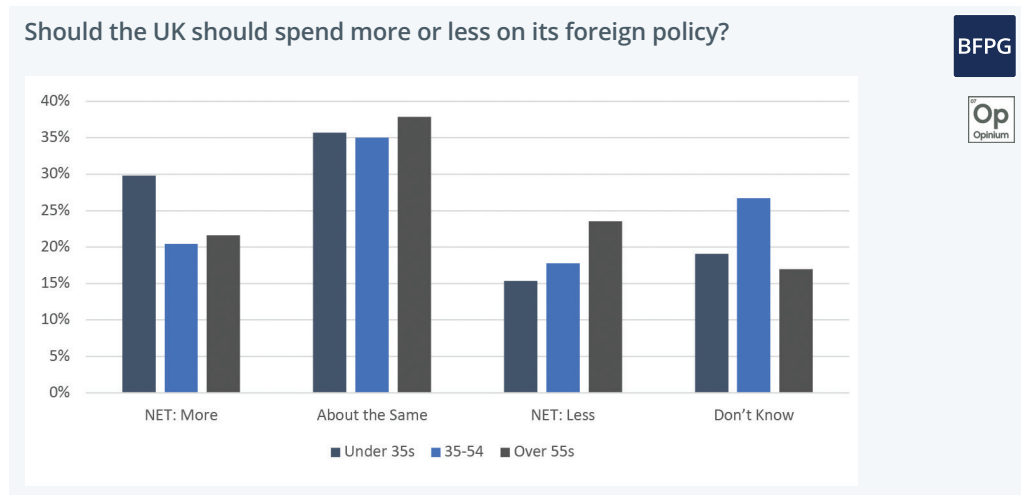


1. Mobility, Identities and Engagement

Foreign Policy Expenditure

The largest proportion of Britons believe the UK should continue spending about the same amount (36%) on our international activities as we currently do, with a further 23% believing we should spend more than our current levels and 19% believing we should spend less. Of those Britons who do think that the UK Government should spend more or less on our international activities, the preference is only for relatively small increases or decreases rather than radical change, which suggests that the status quo position also holds the greatest degree of salience. Over recent years, the proportion of Britons who believe that the UK should spend more on its international programmes has remained stable, with 24% of Britons believing this in 2020 and 23% of Britons believing this in 2021. However, the proportion of Britons who believe we should spend less on these programmes has risen incrementally over recent years, up from 14% in 2020.

Support for increasing spending on the UK's international activities is highest among under-35s (30%), followed by over-55s (22%), and lowest among 35-54-year-olds (20%). However, it is over-55s (24%), rather than 35-to-54-year-olds (18%) who are also the most likely to believe the UK should spend less on these activities. High levels of uncertainty on this theme among women means that men are more likely to advocate for both higher and lower expenditure. Levels of interest in politics more broadly are also closely correlated to support for spending, with those with high levels of political attention (38%) particularly supportive of increasing foreign policy spending, relative to those with mid (19%) or low (13%) levels of political attention. Meanwhile, Liberal Democrat voters (34%) and Labour voters (28%) are more likely to think the UK should spend more rather than less on its international activities, while Conservative voters (23%) and SNP voters (21%) are more likely to think the UK should spend less rather than more on its international activities. Readers of the Financial Times (59%) are the most likely to support increasing spending on the UK's international programmes, and readers of The Sun (21%) and those who do not regularly read a newspaper (20%) are the most likely to believe that the UK should spend less.

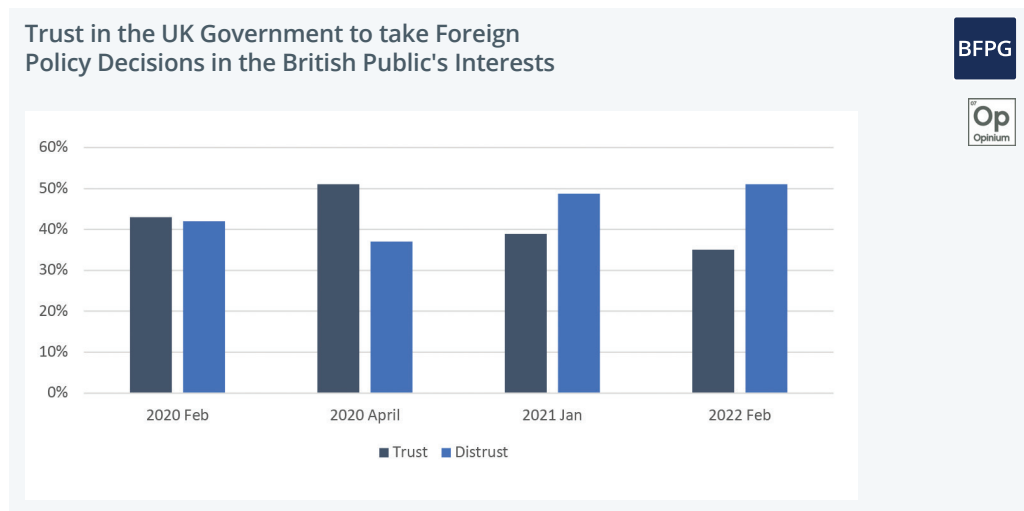


The Global Britain Project

Interest in the UK's International Activities

The trust Britons hold in the UK Government to take foreign policy decisions in the national interest is highly correlated with broader trends around perceptions of government performance and political voting intention. At the beginning of the pandemic in 2020, trust levels on foreign policy increased from 43% in February to 51% by April. These levels of trust began to erode in the second year of the pandemic and 2022 is the first year in which a majority of Britons (51%) have expressed their active distrust in the UK Government. This includes a quarter (24%) of Britons who have high levels of distrust in the UK Government on foreign policy. Only 35% of Britons actively trust the UK Government to take foreign policy decisions in the UK public's interest, and only 5% of Britons have a high level of trust.

Trust in the UK Government in foreign affairs is higher among over-55s (40%) than among under-35s (34%) or 35-54-year-olds (31%). However, it is under-35s who are most likely to actively distrust the UK Government (55%). Geographically, residents in London (43%) and the East Midlands (43%), are the most likely to trust the UK Government to take decisions in the UK public's interest when it comes to foreign policy choices. Levels of trust are lowest in Scotland (28%) and Northern Ireland (28%). Conservative voters (57%) are by far the most trusting of the UK Government on foreign policy, although 30% also express their distrust. Liberal Democrat (30%) and Labour (20%) voters are the next-most trusting, while just 10% of SNP voters trust the UK Government in this regard. In fact, 82% of SNP voters actively distrust the UK Government when it comes to acting in the UK public's interest in foreign affairs.



Pride in the UK's Foreign Policy

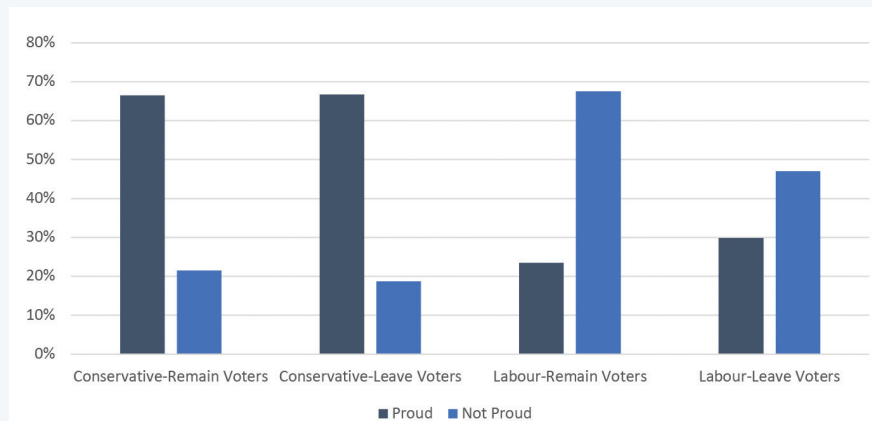
Britons are relatively divided in their levels of pride in UK foreign policy, although they are somehow more likely to be proud (43%) than not proud (40%) of the UK's role in the world. Nonetheless, feelings of active pride are held a little less strongly than feelings of lack of pride. 9% of Britons are very proud of British foreign policy, and 35% of Britons are quite proud of the role the UK currently plays in the world. This contrasts with 27% of Britons who are not very proud of the UK's foreign policy, and 13% of Britons not at all proud of the role the UK currently plays in the world.

2. The Global Britain Project

Would you say you are generally proud or not proud of the role the UK currently plays in the world?

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Demographically, over-55s (47%) and 35-54-year-olds (43%) display higher levels of pride in the role the UK plays in the world than under-35s (39%). In fact, under-35s are more likely to not be proud of the UK's role in the world (46%) than to be proud (39%). Pride is also particularly low in Scotland (39%), the North West of England (39%) and Northern Ireland (31%). Meanwhile, it is highest in the North East of England (54%) and the East Midlands (49%). Pride in the role the UK plays in the world is highest among Conservative voters (67%), followed by Liberal Democrat voters (40%). Meanwhile, Labour voters (24%) and SNP voters (22%) display significantly lower levels of pride. Leave voters (57%) are also significantly more likely to express pride in the UK's role in the world than Remain voters (36%).

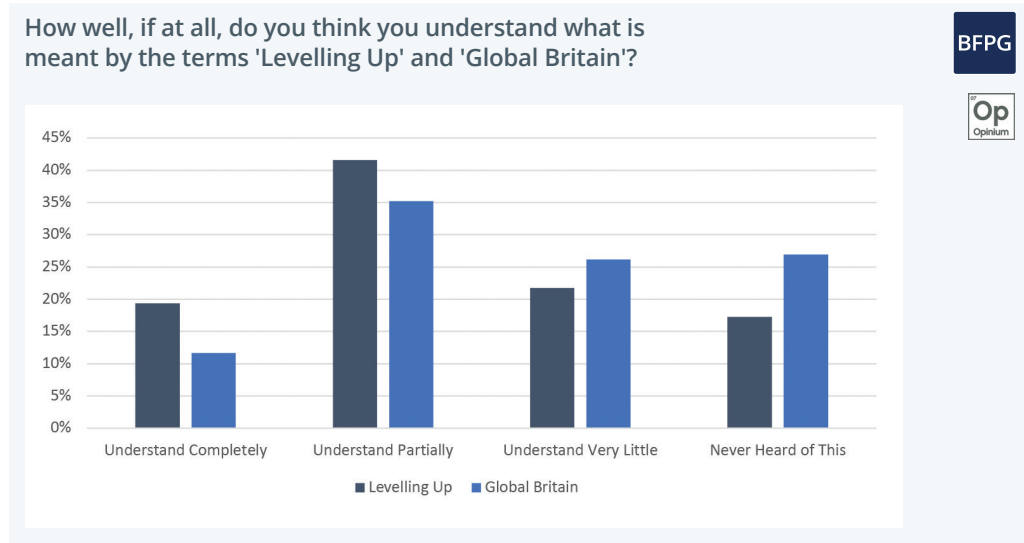
Levelling Up and Global Britain

The Global Britain project remains less resonant or well-understood than the UK Government's other major domestic agenda, Levelling Up. The majority of Britons have heard of 'Global Britain' (73%), however only 12% would say that they fully understand what it means. 35% of Britons have heard of Global Britain and have a partial understanding of its meaning, while 26% of Britons have heard of it but do not understand what this means. A large proportion of the country (27%) has never heard of Global Britain.

Men, older Britons and Liberal Democrat voters show the highest levels of awareness of the Global Britain terminology, however, high levels of recognition do not necessarily equate to high levels of understanding its meaning. For example, Liberal Democrat voters (82%), Conservative voters (78%) and Labour voters (76%) have the highest levels of recognition of the term, and SNP voters have the lowest (70%). However, it is SNP voters (19%) who are the most likely to have both heard of the term and say that they understand what it means. Similarly, over-55s are more likely to have heard of Global Britain (79%), than 35-54-year-olds (72%) and under-35s (66%). However, it is under-35s (13%) that are most likely to have both heard of and say that they understand what Global Britain means. Other notable trends in knowledge and understanding of the Global Britain agenda include the somewhat higher levels of recognition of the term among those in the ABC1 social grade (76%) relative to those in the C2DE social grade (68%). At 78%, recognition of the term is highest in the South West of England, and at 70%, it is lowest in the North West of England.

A larger proportion of Britons (83%) have heard of 'Levelling Up', although again, only 19% of Britons have heard of it and feel they completely understand what it means. The largest group

2. The Global Britain Project



of Britons has heard of the agenda but only have a partial understanding of what it means (42%), while 22% have heard of it but don't understand what it means at all. A further 17% of Britons have never heard of Levelling Up – again, a somewhat less significant proportion of the population than those who are unfamiliar with the Global Britain terminology.

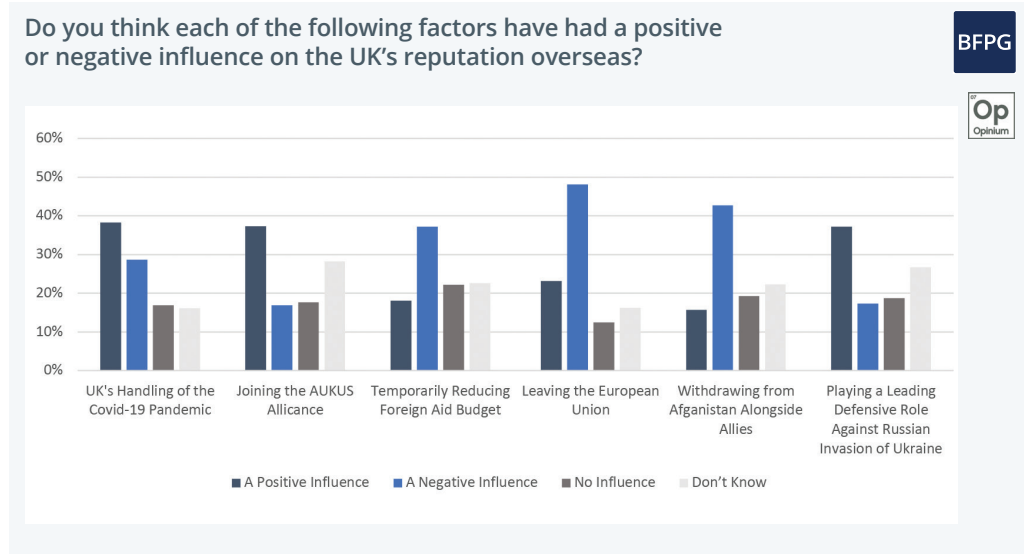
Over-55s (91%) are more likely to have heard of Levelling Up than 35-54-year-olds (83%) and under-35s (70%). In turn, over-55s (24%) are also more likely than 35-54-year-olds (17%) and under-35s (15%) to have heard of and completely understand what Levelling Up is. Similarly, men (87%) are more likely than women (79%) to have heard of Levelling Up, and men (23%) are more likely than women (16%) to say that they fully understand what it means. Recognition of the term Levelling Up is highest among Liberal Democrat voters (91%), followed by Conservative voters (89%) and Labour voters (86%). At 80%, SNP voters are the least likely to recognise the term. They are also the least likely to have heard of and completely understand what the term means (18%).

Global Britain and the UK's Reputation

The Global Britain project emerged in the aftermath of the UK's departure from the European Union, and the publication of the Integrated Review in early 2021 marked the strategic launch of an ambitious agenda. Needless to say, the first year of the UK's new foreign policy posture was particularly eventful, and in this year's survey, we have asked the British people to assess several choices and initiatives made during this period in terms of how they will shape the UK's international reputation. It is important to note that Britons' assessments of how these decisions are received is not interchangeable with their own individual support or hostility towards them – this question is rather capturing a mixture of personal preferences and also something about the way in which Britons believe their nation is seen by the global community.

We find that the actions considered to be most favourable in terms of advancing the UK's global reputation are the UK Government's response to the Covid-19 pandemic (38%), followed by the UK playing a leading military and defensive role in the European response to Russia invading Ukraine (37%) and the UK's decision to join the AUKUS security alliance (37%). By contrast, several decisions are more likely to be seen to have had a negative influence on the UK's reputation overseas, including the UK's decision to leave the European Union (48%), the UK and allied withdrawal from Afghanistan (43%), and the UK Government's decision to temporarily reduce its foreign aid budget during the pandemic (37%). Below we explore the responses to each of these statements in more detail.

2. The Global Britain Project

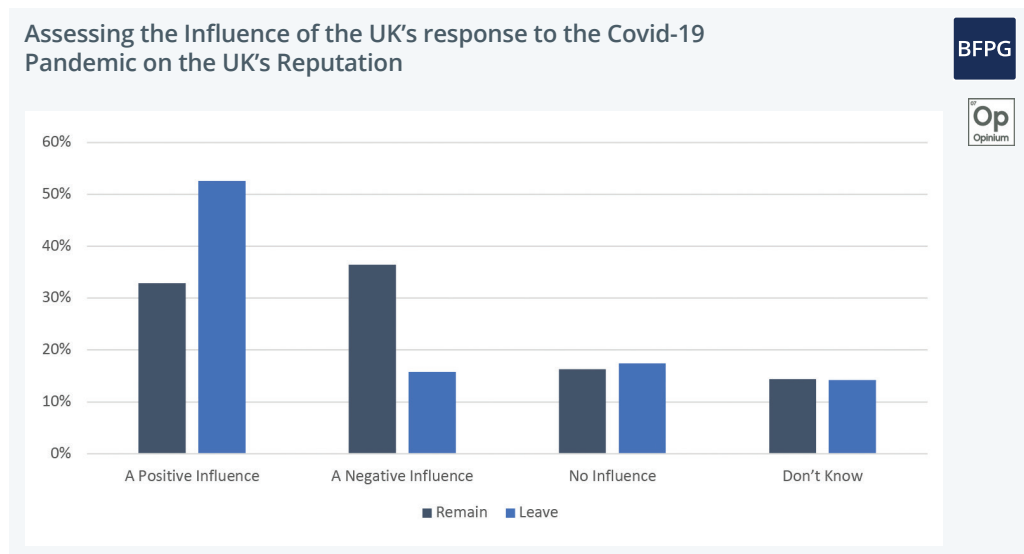


The UK Government's Pandemic Response

The UK's response to the Covid-19 pandemic is the most widely regarded as having had a positive influence on the UK's reputation overseas (38%). That said, almost a third of Britons still believe that it has had a negative influence on the UK's reputation (29%). A further 17% of Britons believe it has had no influence on the UK's reputation, while 16% of Britons are unsure of their position.

Older Britons are significantly more likely to believe the UK's response to the pandemic has had a positive influence on its reputation overseas than younger Britons, with 54% of over-55s believing this, compared to 30% of 35-54-year-olds and 26% of under-35s. In fact, under-35s are more likely to believe the UK's response to the pandemic has had a negative influence on the UK's reputation abroad (42%) than to believe it has had a positive influence (26%). Britons aged 35-54 are also more likely to believe it has had a negative influence (31%) than a positive influence (30%). Residents in the East Midlands are the most likely to believe the Government's pandemic response has had a positive influence (44%) and residents in the North West of England (31%) are the most likely to believe it has had a negative influence.

Perhaps unsurprisingly, Conservative voters (60%) are significantly more likely than voters for any other party to believe the Government's pandemic response has had a positive influence on the UK's reputation abroad, and are more than twice as likely as SNP voters (26%) or Labour voters



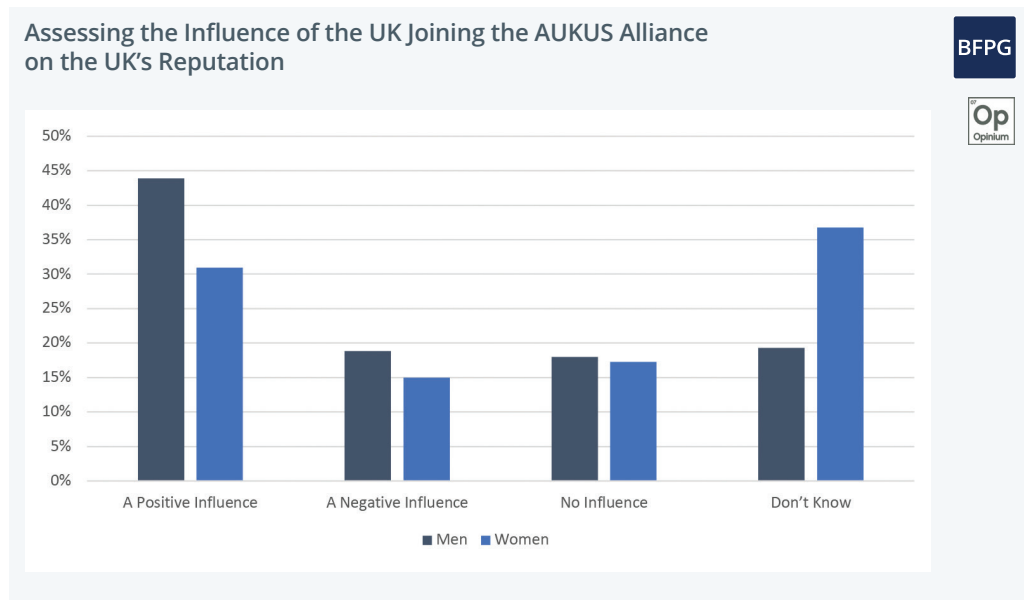
2. The Global Britain Project

(23%) to believe this. In fact, they are more than three times as likely to believe this than Labour voters under 45 years of age (17%). Leave voters (53%) are also more convinced of the positive influence of the UK's handling of the pandemic than Remain voters (33%).

The AUKUS Alliance

While Britons are slightly less inclined to be convinced that joining AUKUS has had a positive influence on the UK's reputation overseas (37%), they are less divided on this theme, with just 17% of Britons believing this decision has had a negative influence on the UK's reputation overseas. However, they are evidently less certain about the impacts of joining AUKUS on the UK's reputation, with almost a third of Britons unsure of the impact this may have had (28%). A further 18% of Britons believe it will have no influence on the UK's reputation overseas whatsoever.

Men (44%) are more likely than women (31%) to believe joining AUKUS has had a positive influence on the UK's reputation overseas, although this is driven in part by the fact women (37%) are almost twice as likely as men (19%) to be uncertain of their perspective. Conservative voters (53%) are again the most likely to believe that the AUKUS alliance has had a positive influence on the UK's reputation, followed by Liberal Democrat voters (32%). Labour voters are marginally more likely to believe that joining AUKUS has had a negative influence on our reputation (26%) than a positive influence (24%). The same is true for SNP voters 32% of whom believe it has had a negative influence, compared to 14% who believe it has had a positive influence.



The 0.7% Development Commitment Reduction

The largest proportion of Britons believe the UK Government's decision to temporarily reduce 0.7% international development spending during the pandemic has had a negative influence on the UK's reputation overseas (37%), and half as many (18%) believe it will have a positive influence on the UK's reputation overseas. However, 23% of Britons are unsure of the impact it will have and 22% of Britons believe it will have no influence on our reputation at all.

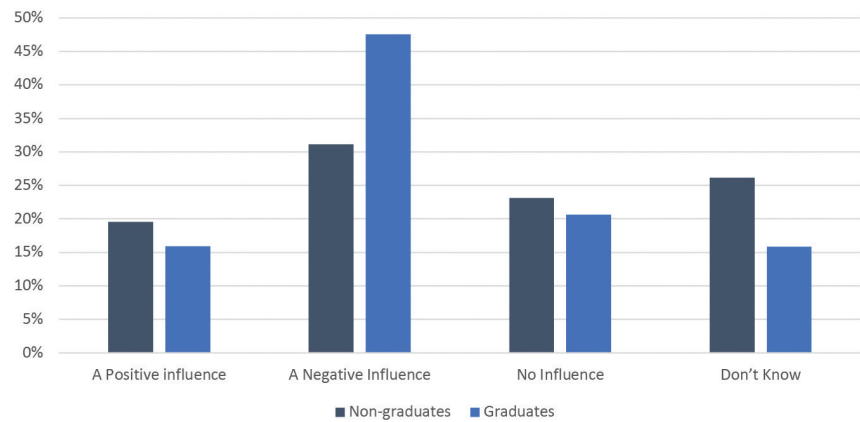
Demographically, graduates (48%) are more likely than non-graduates (31%) to believe the reduction has had a negative influence on the UK's reputation overseas, as are Britons in the ABC1 socio-economic grade (41%) relative to those in the C2DE socio-economic grade (31%). Meanwhile, Labour voters (52%), Liberal Democrat voters (52%) and SNP voters (46%), are more likely than Conservative voters (28%) to believe the reduction in the foreign aid budget has had a negative influence on the UK's reputation overseas. Remain voters (54%) are also almost twice as likely to perceive a negative impact than Leave voters (23%).

2. The Global Britain Project

Assessing the Influence of the UK Temporarily Reducing its Foreign Aid Budget in the Pandemic on the UK's Reputation

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The UK Leaving the European Union

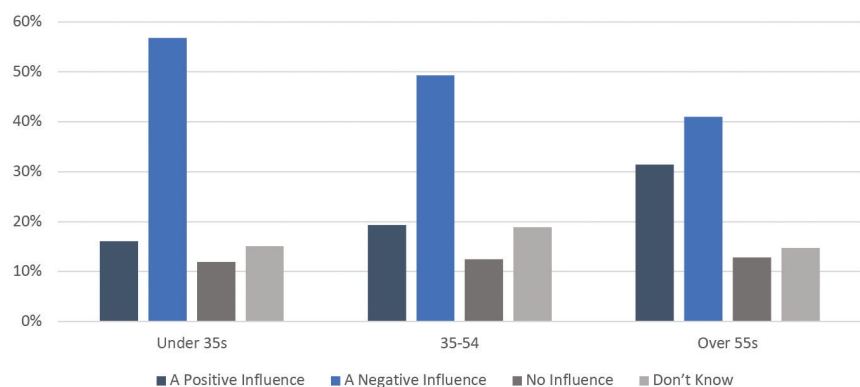
The UK's decision to leave the European Union is seen by almost half (48%) of Britons to have had a negative impact on the UK's reputation overseas. Just under a quarter (23%) of Britons believe it has had a positive influence on the UK's reputation overseas, while 12% of Britons think it has had no influence. A further 16% of Britons are uncertain of their position.

Under-35s (57%) are distinctly more likely to believe leaving the EU has had a negative influence on our reputation overseas than both 35-54-year-olds (49%) and over-55s (41%). Residents in Northern Ireland (58%) and Scotland (56%) are also particularly likely to believe this, while residents in Yorkshire and Humberside (27%) are the most likely to believe it has had a positive influence. Remain voters (75%) are more than three times as likely as Leave voters (21%) to believe that the decision to Leave the EU has had a negative influence on the UK's reputation overseas, as are Liberal Democrat voters (80%) relative to Conservative voters (26%).

Assessing the UK's Decision to Leave the European Union on the UK's Reputation

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The UK and Allied Withdrawal from Afghanistan

The UK's military withdrawal from Afghanistan alongside the United States and other allies is seen by 43% of Britons to have had a negative impact on the UK's reputation overseas. In comparison, just 16% of Britons think it has had a positive impact on the UK's international reputation. A further 22% of Britons are unsure of their position and 19% of Britons do not believe this has had any influence on the UK's international reputation.

2. The Global Britain Project

Graduates (51%) are more likely to believe the withdrawal from Afghanistan will have had a negative influence on the UK's reputation overseas than non-graduates (38%). Men (48%) are also more likely than women (38%) to believe that it will have a negative influence. Interestingly, under-35s (23%) are significantly more likely than 35-54-year-olds (14%) and over-55s (12%) to believe the decision to withdraw will have a positive influence on the UK's reputation overseas. Liberal Democrat voters (61%) are the most likely to believe the withdrawal has had a negative influence on the UK's reputation overseas, followed by SNP voters (52%) and Labour voters (51%). Conservative voters are the least likely to believe it has had a negative influence, although they are still almost twice as likely to believe the withdrawal has had a negative influence on the UK's reputation overseas (37%) than to believe it has had a positive influence (19%).

The UK's Response to the Crisis in Ukraine

The decision by the UK Government to play a leading military and defensive role in the European response to the threat of Russia invading Ukraine is seen by 37% of Britons to have had a positive influence on the UK's international reputation. Fewer than half as many (17%) Britons believe it has had a negative influence. However, at 27%, a large proportion of Britons are uncertain of the impact the UK's active posture on Ukraine's sovereignty has had on the UK's reputation. Further to this, 19% of Britons do not think it will have any impact on the UK's reputation on the world stage.

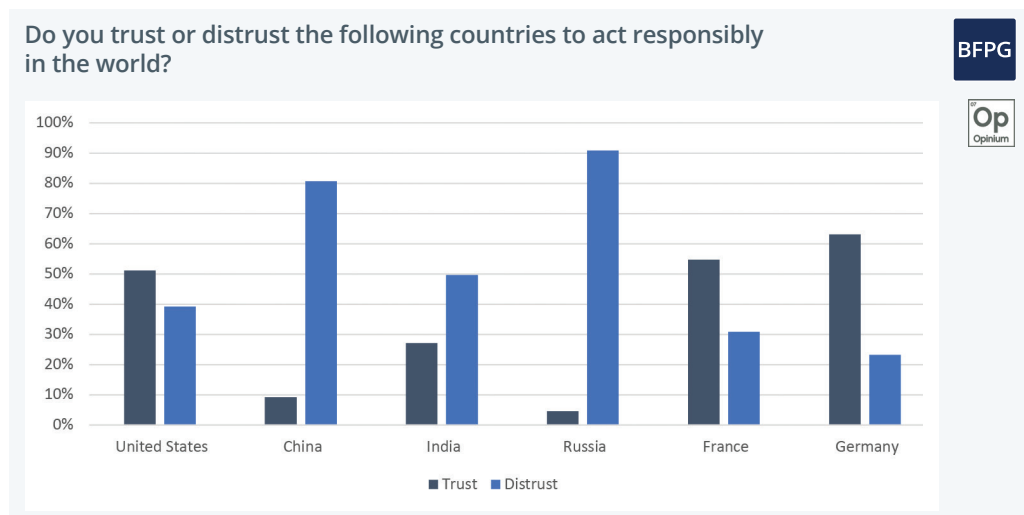
Britons in higher socio-economic grades are more likely than those in the lower socio-economic grades to believe playing a leading role in this area will have a positive influence on the UK's reputation overseas, with 41% of those in the ABC1 social grade believing this, compared to 31% of those in the C2DE social grade. Conservative voters (48%) are also particularly likely to believe it will have a positive influence, as are Liberal Democrat voters (39%), while SNP voters (28%) and Labour voters (28%) are less convinced.

The UK's Alliances

Trust in Other Nations

Of the nations included in this year's survey, Germany (63%) is the most likely to be trusted in terms of its capacity to act 'responsibly' on the world stage, followed by France (55%) and the United States (51%). This follows a longer-standing trend by which Germany is consistently seen more favourably by the British people in our surveys than France, and the United States retains a more divisive impression as a global actor. India clearly stands distinctly alongside our other allies, with just 27% of Britons expressing trust in its international actions – and it is important to note that this survey was conducted before India chose to pursue a position of strategic ambiguity on the Russian invasion of Ukraine. In terms of our strategic rivals, Britons' distrust of Russia has reached near-universal levels in this year's survey, at 91%, and China continues to be viewed with suspicion, albeit with a higher degree of uncertainty, with 81% of Britons actively distrusting its capacity to act responsibly in the world.

In this year's survey, we slightly altered the construction of this question to enable respondents to choose a 'Don't Know' option, which will ensure this becomes a more enduringly robust data point in the future. This has somewhat redistributed the findings for this question. We have also slightly adjusted the nations included, narrowing down from ten nations to six, in order to minimise respondent fatigue and further optimise the quantitative validity of the results. While this means the data is, in a strictly empirical sense, not able to be compared exactly year-on-year with our 2020 and 2021 surveys, we can still observe the broader trends taking place. One of the most striking of these is that Britons' trust in other nations appears at first glance to have faltered over the past year, with falls in levels of trust across both allies and strategic rivals. Looking closely, however, we can see that the inclusion of the 'Don't Know' response appears to have correlated with a decline in the proportion of Britons expressing active distrust in our allies – with the exception of India, where the inclusion of the 'Don't Know' response is correlated with the decline in the proportion of Britons expressing a moderate level of active trust. This indicates that India may have gone through a specific period of decline in its reputation amongst the British people over the past year.



Germany

Overall, out of the six nations presented to them, Britons are most trusting of Germany, with 63% of Britons trusting Germany to act responsibly in the world, compared with the 23% who actively distrust the country. Demographically, trust in Germany is higher among men (71%) than women (56%), and regionally, trust in Germany is highest in London (72%) and Scotland (70%),

3. The UK's Alliances

and lowest in the West Midlands (55%) and the North West of England (57%). Liberal Democrat voters (82%) are particularly trusting of Germany relative to SNP (74%), Labour (71%), and Conservative voters (62%). Furthermore, Remain voters (77%) are more trusting of Germany than Leave voters (56%).

France

55% of Britons trust France to act responsibly in the world. Notably, feelings of trust are not strongly felt, with a large plurality (47%) somewhat trusting France, compared with only 8% who strongly trust the nation. Trust in France is higher among under-35s (64%), than among 35-54-year-olds (54%) or over-55s (49%). It is also higher among those from higher (ABC1) social grades (60%) than those in lower (C2DE) social grades (48%). However, political affiliations are the most notable drivers of levels of trust in France, with trust highest among Liberal Democrat voters (70%), followed closely by SNP voters (69%) and Labour voters (65%). Just 48% of Conservative voters trust France to act responsibly in the world. Trust in France in this regard is also higher among Remain voters (67%) than Leave voters (44%).

United States

A small majority of Britons (51%) trust the United States to act responsibly in the world. Despite slight differences in overall levels of trust between the United States and France, Britons are equally as likely to strongly trust both nations (8%). It is notable that there are few stark differences in levels of trust in the United States across demographics, relative to the differences seen in relation to other nations, suggesting a growing consensus in Britons' perspectives of the nation. Britons from a higher (ABC1) social grade, for instance, are only slightly more likely (53%) to trust the United States than those from a lower (C2DE) social grade (49%). Nonetheless, some distinctions remain around gender and political persuasion, with men (57%) more likely to trust the United States than women (46%). Conservative voters (61%) are also more likely to trust the United States than Liberal Democrat (49%) and Labour voters (48%), and significantly more likely to do so than SNP voters (37%).

India

Britons are relatively sceptical of India's international actions, and are more likely to distrust (50%) than trust (27%) India to act responsibly in the world. Around a quarter (23%) of Britons are unsure about their position, the largest expression of uncertainty in responses to any country. Feelings of distrust towards India are more strongly felt than feelings of trust, with 14% of Britons strongly distrusting in India, while only 3% of Britons strongly trust it. Distrust of India is higher among over-55s (54%) and 35-54-year-olds (50%) than under-35s (43%). Regionally, it is highest in the East Midlands (56%) and lowest in the North East (43%) and North West (44%). There is notably little variation in levels of trust based on social grade, with both higher (ABC1) social grades and lower (C2DE) social grades displaying near-identical distrust in India, at 50% and 49% respectively. There is more variation in feelings of trust and distrust among different political perspectives. Distrust is highest among Conservative voters (57%) and lowest among Labour voters (42%). In turn, Labour-Remain voters are more trusting (34%) of India than Conservative-Leave voters (23%).

China

The vast majority of Britons do not trust China to act responsibly in the world, with 81% of Britons actively distrusting China. This includes 51% of Britons who strongly distrust China. Only 9% of Britons trust China to any degree in this regard, with 8% of Britons somewhat trusting China and only 1% strongly trusting it. Distrust of China is highest among older Britons, with 88% of over-55s distrusting China, compared to 82% of 35-54-year-olds and 69% of under-35s. Just 3% of over-55s actively trust China to act responsibly in the world. Geographically, residents in rural areas (87%) and suburban areas (84%) are more distrustful of China than residents in urban areas (73%). In terms of political perspective, distrust is

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particularly high among those with high (91%) and mid (82%) levels of political attention, relative to those with low levels of political attention (66%). It is also particularly high among Conservative-Leave voters (90%), relative to Labour-Leave (85%), Labour-Remain (83%), and Conservative-Remain voters (79%).

Russia

Britons' highest levels of distrust are reserved for Russia, with 91% of Britons actively distrusting Russia, including a large majority of Britons who strongly distrust it (83%). Only 5% of Britons trust Russia at all, and only 1% strongly trust it. In turn, Britons are relatively certain in their feelings on this matter, with only 5% of Britons being unsure about their trust in the country. Demographic trends in levels of trust in Russia mirror many of the trends in levels of trust with China, with older Britons living in rural areas, and those who have high levels of political attention, the most distrustful of Russia. For example, 96% of over-55s distrust Russia, compared to 91% of 35-54-year-olds and 84% of under-35s. Levels of distrust in Russia are equally high across political perspectives, with 94% of Conservative voters expressing distrust in the country, followed by 93% of SNP voters, and 92% of Labour and Liberal Democrat voters. It is also worth noting that, as with China, levels of distrust are lowest in London (84%).

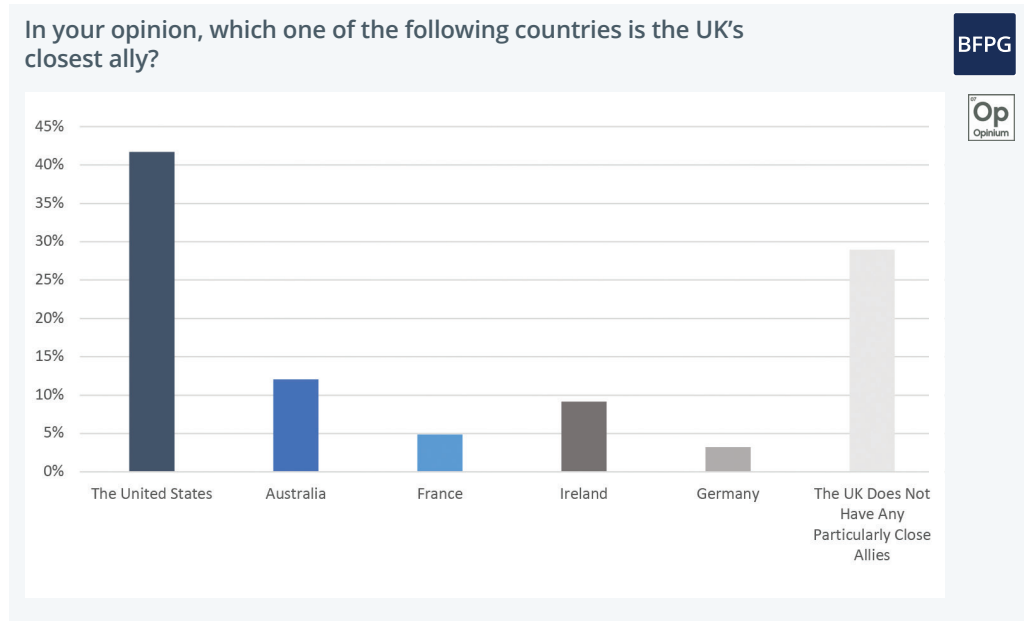
The UK's Closest Ally

Despite the evolving perceptions of the United States' democracy and society, and some of the emotional weight falling away from the relationship, it remains Britons' first choice as the nation's closest ally, with 42% of Britons believing this to be the case. The BFPG's focus groups suggests that the strategic alliance continues to be valued, even with a degree of reluctance, and recognised for its enduring utility even as deeper questions are asked about America's future. It is notable that more Britons believe that the UK does not have any particularly close allies (29%) than they are to select any other nation as the UK's closest ally, with Australia (12%), Ireland (9%), France (5%) and Germany (3%) all distant runners-up.

In terms of demographic variation, women (35%) are 12 percentage points more likely than men (23%) to believe the UK does not have any particularly close allies. This should be taken alongside the higher propensity of women to carry generalised insecurity about global affairs, and to self-report as having lower levels of knowledge about foreign policy. In turn, men are more likely than women to believe each of the nations proposed could be the UK's closest ally, with the exception of Ireland, which 10% of women view as the UK's closest ally, compared to 8% of men. Over-55s (34%) and 35-54-year-olds (32%) are more likely than under-35s (19%) to believe that the UK has no particularly close allies. Over-55s are also the most likely to believe that Australia is the UK's closest ally (16%). In turn, 35-54-year-olds are the most likely to believe that the United States is the UK's closest ally (44%), while under-35s (13%) are significantly more likely than 35-54-year-olds (2%) or over-55s (1%) to view France as the UK's closest ally. This generational data suggests that the erosion of the concept of 'natural allies' is catalysed by a process of older Britons losing faith in the United States and being unwilling to replace this relationship with European partners, while younger Britons are inherently sceptical towards the United States but more likely to feel a sense of implicit connection to the European neighbourhood.

Labour-Leave voters (37%) and Labour-Remain voters (36%) are more likely than Conservative-Leave (26%) or Conservative-Remain (23%) to believe that the UK has no particularly close allies. In turn, Conservative-Remain voters (52%) are the most likely to view the United States as the UK's closest ally, while Labour-Remain voters (36%) are the least likely to. This illustrates an important division between the instincts of the Remain vote as sorted throughout the political parties, with Conservative-Remain voters more instinctively globalist and Labour-Remain voters more instinctively European. Meanwhile, Conservative-Leave voters are the most likely to view Australia as the UK's closest ally (20%), while Labour-Remain voters are the most likely to view Ireland as the UK's closest ally (10%).

3. The UK's Alliances



In 2021, we asked a similar question about who Britons regarded as the UK's 'best friend', and the largest proportion of Britons believed that the UK does not have a best friend (37%). However, as when asked in 2022 about who the UK's closest ally is, the United States similarly came top, and Australia outranked both France and Germany in the extent to which it was regarded as the UK's best friend. We have chosen to move to the language of 'allies' to better capture the wider social process through which the emotional weight of alliances appears to be in retreat, while the strategic value of alliances may remain relatively stable.

The UK's Relationships with the United States and the EU

When asked which relationship, out of the United States and the European Union, they view as most important to the UK, Britons are more inclined to view the European Union as more important (42%) than to view the United States as more important (34%). Almost a quarter of Britons are unsure of their position (24%). While our relationship with the European Union continues to be seen as more important than our relationship with the United States, the extent to which this is the case has fallen by 11 percentage points over the past year. This has been driven both by an increase in the proportion of Britons who believe our relationship with the United States to be most important (up to 34%, from 27%), and by an increase in the proportion of Britons who are unsure of their position (up from 20%). This process has likely been fuelled by the election of Joe Biden, which has somewhat restored America's tarnished image under Donald Trump, as well as the softening of the Brexit debate and the diminished visibility of issues pertaining to the EU relationship – such as trade – in the UK's political culture. It is also certainly the case that the pandemic, which focused attentions on national governments and domestic responses, has heightened visibility of the UK's independence as an actor.

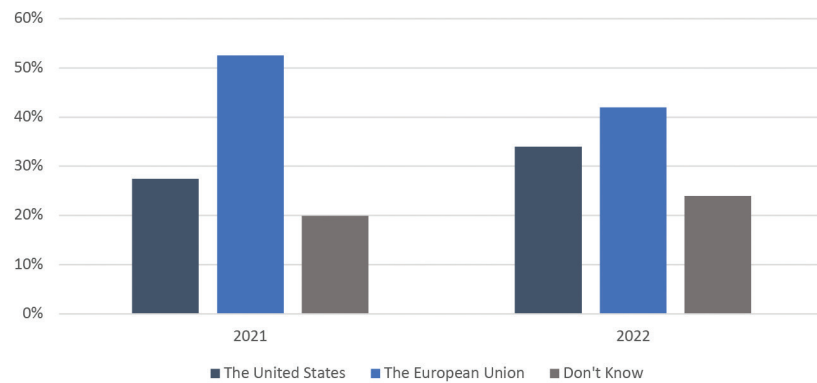
Graduates (50%) are more likely than non-graduates (37%) to prioritise the UK's relationship with the EU, driven both by higher levels of uncertainty among non-graduates but also by the fact non-graduates (36%) are more likely than graduates (31%) to believe the UK's relationship with the United States is the most important. In turn, women's high levels of uncertainty mean they are less likely than men prioritise either relationship. Liberal Democrat voters (63%) and Labour voters (60%) are the most likely to prioritise the UK's relationship with the EU, followed by SNP voters (47%). Meanwhile, Conservative voters (24%), particularly Conservative-Leave voters (19%) are the least likely to do so. Remain voters (64%) are three times as likely as Leave voters (21%) to prioritise the UK's relationship with the EU.

3. The UK's Alliances

Is the UK's relationship with the European Union or the United States more important?

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The UK's Relationship with the United States

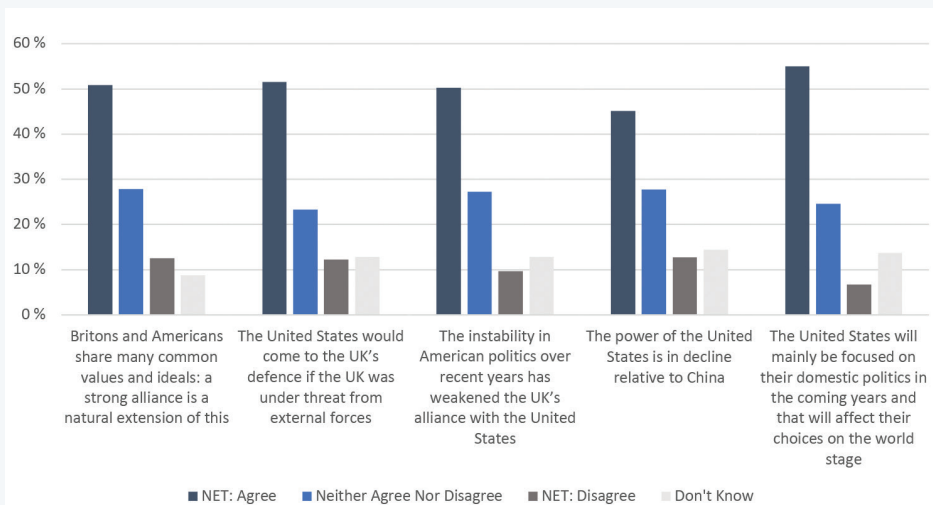
As has been previously noted, many Britons continue to recognise the strategic and security value of the 'special relationship', yet the positive emotional elements of the UK-US bilateral relationship have been diminished. This in part reflects the British people's concerns about America's future, believing its democracy and its society are not in especially good shape, and that this will bear consequences for the way in which the nation's leaders approach its global role. These anxieties about America's social and political stability also appear to be driving a wedge between the perceived proximity of the two nations. In our survey, a majority of Britons believe that the United States will mainly be focused on its domestic landscape in the coming years and that this will affect its choices on the world stage (55%), and that the instability in American politics over recent years has weakened the UK's alliance with the United States (50%).

Nonetheless, the picture is complex and Britons are clearly conflicted in their instincts. A significant proportion of Britons believe the power of the United States is in decline relative

To what extent do you agree or disagree with the following statements about the UK's relationship with the United States?

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to China (45%), but there is no doubt that the bilateral security relationship is seen to be enduring, with a majority of Britons believing the United States would come to the UK's defence if the UK was under threat from external forces (52%). Moreover, there is some degree of residual affection on a people-to-people level, as a majority of Britons also believe that Britons and Americans share many common values and ideals and that therefore a strong alliance is a natural extension of this (51%). This suggests that the concerns Britons hold about the United States are most heavily concentrated in its political culture and the health of its democracy, which has corrupted and depleted what should be a relationship of some natural proximity.

It is noticeable, however, the distinctions in opinions between the British and Australian people on their respective relationships with the United States, with Australians in the 2021 Lowy Institute Survey (76%) considerably more likely than Britons (51%) to believe that they share common values with Americans and that a strong alliance is a natural extension of this, and Australians (75%) significantly more confident than Britons (52%) that the United States would come to their defence if they were under attack. Meanwhile, Britons (45%) are more likely than Australians to believe that the United States is in decline relative to China (36%).¹ These findings add a unique perspective to the AUKUS partnership between the three nations and raise the question as to which relationship warrants the 'special' moniker.

Below we consider the demographic distinctions in the support for each of these statements.

Common Values and Ideals

Overall, 51% of Britons believe that Britons and Americans share many common values and ideals and that therefore a strong alliance is a natural extension of this, and 13% of Britons actively disagree. A further 28% of Britons neither agree nor disagree and 9% of Britons are unsure of their position.

The belief in the existence of shared values is higher among men (59%) than women (43%), and more widely held by older Britons, with 58% of over-55s believing this, compared to 46% of under-35s. Britons who read the Daily Star (67%) or the Daily Express (66%) are the most likely to perceive a baseline of common values and ideals, and readers of the Guardian are the most likely to actively disagree (20%). Conservative voters (64%) are the most likely to believe that the two nations share many common values, followed by Liberal Democrat voters (54%) and Labour voters (46%). SNP voters are the least likely to believe this (30%).

America as a Faithful Ally

A majority of Britons (52%) believe that the United States would come to the UK's defence if the UK was under threat from external forces. This includes 12% of Britons who strongly agree that this is the case. Only 12% of Britons do not believe that the United States would come to the UK's defence if it was under threat from external force. However, 23% of Britons neither agree nor disagree with this and 13% of Britons are unsure of what the United States would do in this situation, which means 36% of Britons are ambivalent or uncertain about the strength of the security alliance.

Men (56%) are more likely than women (47%) to believe that the United States would come to the UK's defence if it was under threat from external forces. Geographically, residents in London are the most likely to believe the United States would come to the UK's defence (58%), while residents in Scotland are the least likely to (44%). Conservative voters (62%) are more likely than Liberal Democrat voters (54%), Labour voters (47%) and SNP voters (37%) to believe the United States would come to the UK's defence. This includes 72% of Conservative voters under 35 years of age, which are the most enthusiastic group about the UK-US defensive alliance.

¹ Kassam, N. (2021, June 23). Lowy Institute Poll 2021. *The Lowy Institute*. Retrieved from: <https://poll.lowyinstitute.org/report/2021/>

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Domestic Political and Social Instability

Half of Britons (50%) believe that the instability in American domestic politics over recent years has weakened the UK's alliance with the United States, with 11% of Britons strongly believing this. Only 10% of Britons do not believe this to be the case. However, 27% of Britons neither agree nor disagree and 13% of Britons are unsure of their position.

Graduates (60%) are particularly likely to believe that the instability in American politics in recent years has weakened the UK's alliance with the United States, compared to 45% of non-graduates. Over-55s (55%) are also more likely to believe this than 35-54-year-olds (48%) or under-35s (46%). Liberal Democrat voters (69%) are more likely to believe that instability in American politics has weakened our relationship with the nation than Labour (59%), SNP (53%) or Conservative (52%) voters. Britons with high levels of political attention (65%) are also particularly likely to believe this, relative to those with mid-levels of political attention (49%) or low levels of political attention (29%).

America's Power in Decline

Just under half (45%) of Britons believe that the power of the United States is in decline relative to China, while only 13% of Britons contest this statement. However, 28% of Britons neither agree nor disagree that this is the case and 14% of Britons are unsure of their position, bringing the total of uncertain and ambivalent opinions close to matching those who endorse the statement.

Looking demographically, graduates (54%) are more likely than those in the C2DE social category (37%) to believe that the United States is in decline relative to China, as are men (51%) relative to women (40%), although in both cases this is driven by high levels of uncertainty among women and those from low socio-economic backgrounds, rather than active disagreement. However, levels of active disagreement are particularly high in the North West of England (18%) and the East Midlands (18%), and lowest in Wales (8%). Liberal Democrat voters (60%) are the most likely to believe the United States is in decline relative to China, while Labour (49%), SNP (47%) and Conservative voters (47%) are broadly aligned in their views.

Consuming Domestic Politics

A majority (55%) of Britons believe that the United States will mainly be focused on its domestic politics in the coming years and that this will affect their choices on the world stage, with 13% of Britons strongly agreeing with this. Only 7% of Britons do not believe this to be the case. However, 25% of Britons neither agree nor disagree that the United States will be more domestically focused, impacting its international decisions, and a further 14% of Britons are unsure of their position.

Over-55s (62%) are more likely than under-35s (52%) or 35-54-year-olds (49%) to believe that the United States will focus domestically over the next few years, as are men (61%) relative to women (49%). In both cases, this is driven primarily by high levels of uncertainty, rather than active disagreement. Residents in the South West of England (63%) and Northern Ireland (63%) are the most likely to believe that America is being drawn towards insularity, and residents in the West Midlands (48%) and North East (48%) are the least likely to do so. In turn, residents in the West Midlands (9%), alongside residents in London (9%) are the most likely to disagree that the United States will focus inwards, impacting its choices on the world stage.

The Future of the UK-EU Relationship

Britons support the UK pursuing a wide range of forms of engagement with the European Union, some of which have been within scope of the Brexit departure agreement, and others which have yet to be codified. These preferences offer a pathway to the development of a new relationship outside the formal structures of the European Union, although fulfilling these expectations will require some expectations management on the UK side and an acceptance on the EU side of the UK's special status as a third country.

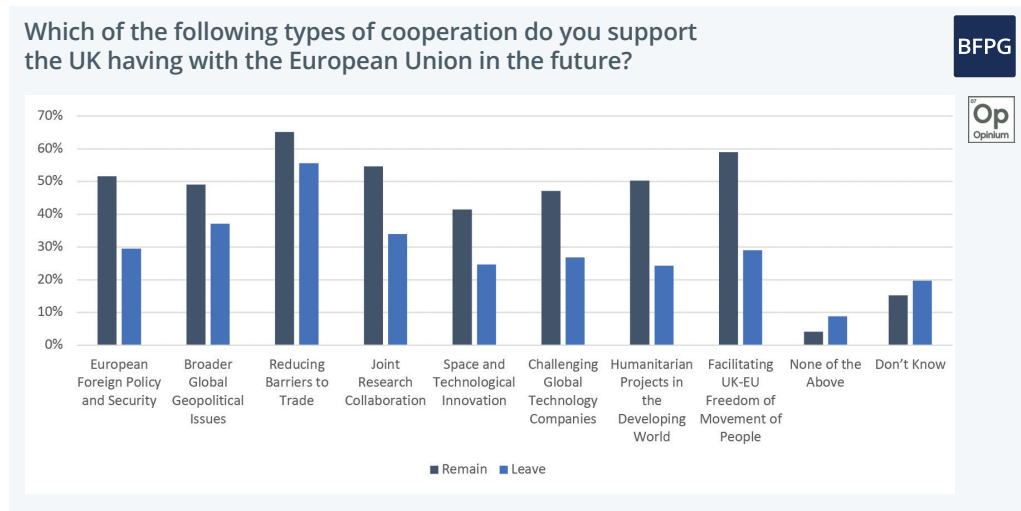
3. The UK's Alliances

The most popular form of engagement is the trading relationship, with a majority of Britons supporting the reduction of barriers to trade in goods and services with the EU (55%). This is followed by the facilitation of UK-EU freedom of movement of people (41%), joint research collaboration and academic exchanges (40%), cooperation on broader global geopolitical issues, such as the rise of China (39%) and cooperation on European foreign policy and regional security (37%). Collaborating on humanitarian projects and investments in the developing world (35%) and cooperation to challenge the dominance of global technology companies (34%), are slightly less popular, and with 30% of Britons' support, cooperation on space exploration and technological innovation is the least popular form of cooperation. Despite the pervasive nature of the Brexit debate over the past seven or so years, a fifth of Britons (21%) are unsure about which forms of engagement with the European Union they support. Just 7% of Britons do not support any of these forms of cooperation with the EU.

Age is a significant factor in determining support for different forms of engagement with the EU, with over-55s more supportive of all forms of engagement than their younger counterparts – perhaps counterintuitively to the stereotype of younger Britons being more supportive of the UK's membership of the European Union. The sharpest of these disparities can be seen in support for reducing barriers to trade in goods and services, with 66% of over-55s supporting this, compared to 43% of 35-54-year-olds and 51% to under-35s. The next most substantive distinction lies in support for cooperation on broader geopolitical issues, such as the rise of China, which is supported by 47% of over-55s, compared to 36% of 35-54-year-olds and 30% of under-35s. This is driven, in part, by high levels of uncertainty among both under-35s (24%) and 35-54-year-olds (24%) about forms of cooperation to support, relative to over-55s (16%).

Similar trends can be seen based on socio-economic and educational status, with graduates consistently more likely than non-graduates to support each type of cooperation, as are those in higher (ABC1) social grades relative to those in lower (C2DE) social grades. For example, graduates (54%) are 22 percentage points more likely than non-graduates (32%) to support joint research collaboration and research exchanges between the UK and the EU. At the same time, 25% of non-graduates are unsure of their position on cooperation with the EU, compared to 13% of graduates. The same is true for gender, with men more supportive than women across the board, driven by women's high levels of uncertainty, although the disparities in this regard tend to be less sharp.

Liberal Democrat voters are the most supportive of all types of cooperation with the EU of all the political parties, while SNP and Conservative voters are consistently the least supportive. For example, 63% of Liberal Democrat voters support new agreements to facilitate UK-EU freedom of movement. In comparison, this is supported by 55% of Labour voters, 48% of SNP voters, and a third (33%) of Conservative voters. Similarly, 63% of Liberal Democrat voters also support



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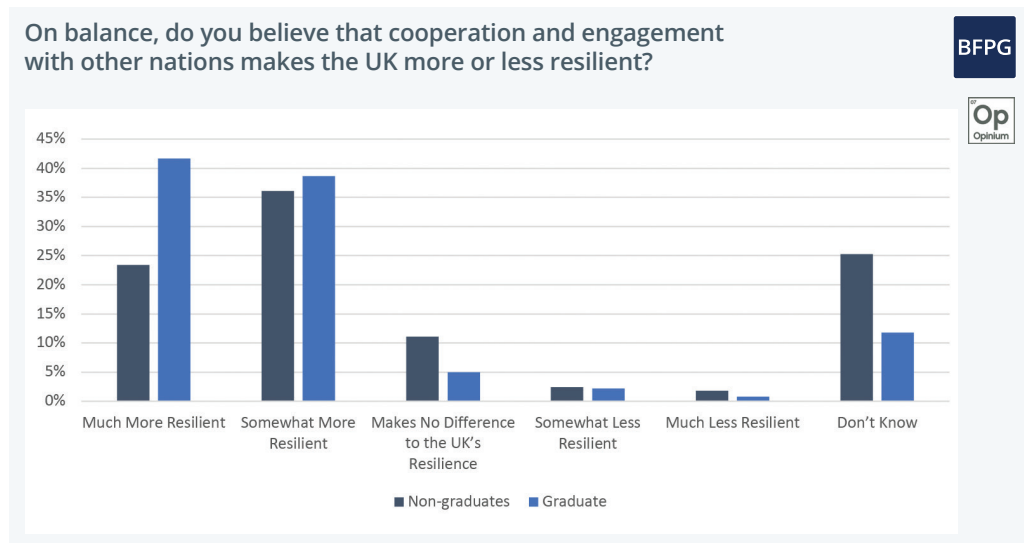
joint research collaboration and academic exchanges. To compare, this is supported by 51% of Labour voters, 38% of Conservative voters and 34% of SNP voters. Unsurprisingly, Remain voters are consistently more supportive of all forms of cooperation with the EU than Leave voters. The sharpest of these disparities is in support for new agreements to facilitate UK-EU freedom of movement, which is supported by 59% of Remain voters, compared to just 29% of Leave voters.

International Partnerships and National Resilience

There have been concerns that the longer-term concerns that have been emerging and becoming politically salient over the past decade regarding the trajectory of globalisation may have encouraged citizens to wish for their governments to pursue a more insular, nationally focused agenda and to consider the prospect of cooperation with other nations as a source of insecurity rather than resilience. In this year's survey, we have asked a specific question on this theme. Encouragingly, a clear majority of Britons (67%) believe the UK's international partnerships make us more resilient, including 30% of Britons who believe they make us 'much more' resilient. Only 9% of Britons believe they make no difference to our resilience, and 3% of Britons believe they actively make the UK less resilient. Around a fifth of Britons are uncertain as to what impact our international partnerships have on our national resilience (21%).

Given the low levels of belief that our international partnerships make us actively less resilient, disparities in beliefs about their impact are driven primarily by uncertainty. For example, graduates (80%) are more likely to believe these relationships make us more resilient than non-graduates (59%) – but reflecting the fact that 12% of graduates are uncertain of their position, compared to a quarter (25%) of non-graduates. Similarly, women, Britons from lower socio-economic backgrounds and those with low levels of political attention are less likely to actively believe these relationships make us more resilient, but they are also broadly aligned with their counterparts in their scant inclination to think that these relationships make us less resilient. Hence, despite the 'good news' of the overall findings in terms of Britons' willingness to regard cooperation as bearing security dividends, it is also clear that the case needs to be made to properly win over and secure the consent of relatively large sections of the population.

Liberal Democrat voters (87%) are the most likely to believe international partnerships make us more resilient, followed by Labour voters (72%) and Conservative voters (70%) who are closely aligned on this issue. At 61%, SNP voters are the least likely to believe that these partnerships make the UK more resilient, although again this disparity is driven primarily by high levels of uncertainty (23%), rather than a belief that these relationships make us actively less resilient (4%).

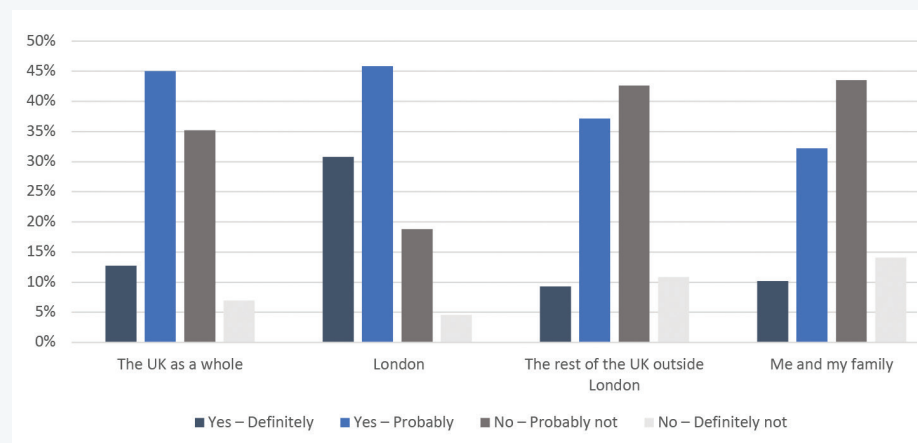


Globalisation and Trade

Perceptions of the Benefits of Globalisation

The BFPG has been tracking perceptions of the benefits of globalisation over recent years, and particularly interrogating the question of whether these dividends are seen to be spread evenly throughout different parts of the UK and how Britons assess the relationship between London's success and the economy as a whole. Responses to this question have been relatively consistent over time, however there are some evident shifts in the findings this year. Overall, a majority of Britons continue to believe that globalisation has been beneficial for the UK as a whole (58%). This rises to 77% of Britons who think that globalisation has benefited London. Yet, 54% of Britons do not believe that globalisation has benefited areas of the UK outside of London, and a majority of Britons now do not believe that globalisation has personally paid dividends to them or their families (58%).

Which of the following have benefited from globalisation?



The most significant area of movement this year has been the sharp decline in the proportion of Britons who believe that globalisation has benefitted them and their families, which has fallen 11 percentage points, from 53% in 2021 to 42% in 2022. It is also evident in the proportion of Britons who believe globalisation has benefitted the UK as a whole, which has fallen 8 percentage points, from 66% in 2021 to 58% in 2022, and the proportion of Britons who believe that it has benefitted areas outside of London, which has also fallen 8 percentage points, from 54% in 2021 to 46% in 2022. In contrast, levels of belief that globalisation has benefited London have only fallen two percentage points from 79% in 2021 to 77% in 2022. It is also noticeable that this is the reverse of the trend seen in the United States, where belief in the benefits of globalisation for their nation is much higher and growing, with a survey by the Chicago Council in August 2021 finding that 68% of Americans believe globalisation is mostly good for the United States, up from 65% in 2020.²

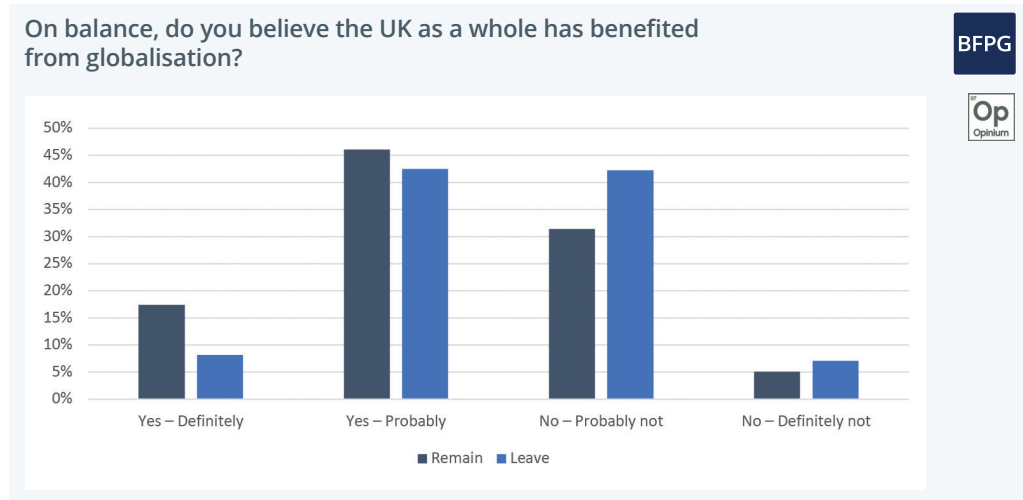
Looking to the demographic breakdown of responses, men, under-35s, Britons in higher socio-economic grades and graduates are the most likely to perceive positive benefits from globalisation. The age disparities in support for globalisation are particularly distinct and in relation to the benefits of globalisation outside of London. Under-35s (67%) are 23 percentage points more likely to believe the rest of the UK outside of London has benefited from

² Smeltz, D., Daalder, I., Friedhoff, K., Kafura, C., & Sullivan, E. (2021, October 7). 2021 Chicago Council Survey. *The Chicago Council*. Retrieved from: <https://www.thechicagocouncil.org/research/public-opinion-survey/2021-chicago-council-survey>

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globalisation than 35-54-year-olds (44%) and 33 percentage points more likely to believe this than over-55s (34%). In terms of socio-economic backgrounds, the most prominent disparity emerges in terms of personal benefits perceived to stem from globalisation, with 49% of Britons in the ABC1 socio-economic grade believing they have benefited from globalisation, compared to 32% of those in the C2DE social grade.

Regionally, residents in Northern Ireland and London tend to be the most likely to perceive globalisation to be beneficial across a range of areas, with 76% of residents of London and 72% of residents of Northern Ireland believing globalisation has benefitted the UK as a whole. Meanwhile, residents in the South West are the least likely to believe globalisation has benefited London (68%) and residents in Scotland are the least likely to believe globalisation has benefited the UK as a whole (44%). Residents in Scotland (36%), the North East of England (35%) and Yorkshire and Humberside (34%) are the least likely to believe globalisation has had benefits outside of London. However, it is residents of Wales (28%) which are by far the least likely to perceive benefits of globalisation to them and their families. In terms of political affiliations, Liberal Democrat voters are consistently the most likely to perceive benefits from globalisation, while SNP voters are consistently the least likely to do so. For example, 67% of Liberal Democrat voters believe that globalisation has benefited the UK as a whole, compared to 58% of Conservative voters, 57% of Labour voters and 43% of SNP voters.



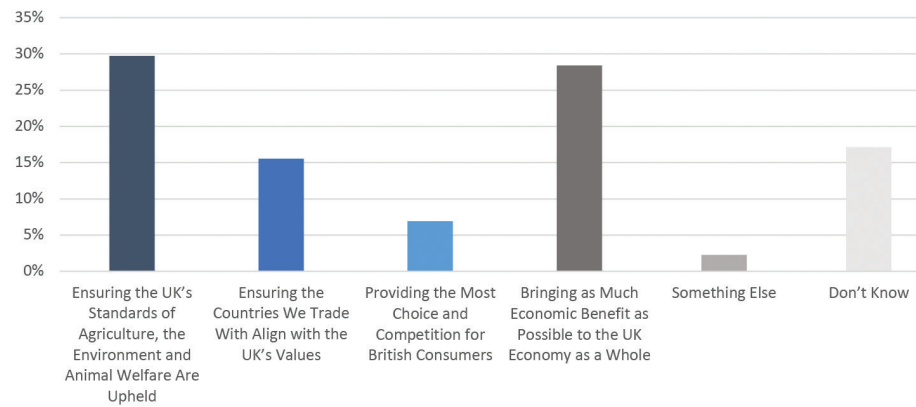
The UK's Trade Priorities

The BFPG has been tracking Britons' concerns about free trade agreements since 2017, and some consistent patterns have emerged around food, environmental and labour market standards, which feel as though they are likely to remain stable in the short- and medium-term. This year, we have instead sought to press Britons on the trade-offs inherent within trade, to better understand how these dynamics may prove to be politically salient as the UK seeks to expand its trading relationships outside of its most 'like-minded' allies.

Overall, we find that Britons are inclined to believe that ensuring the UK's standards of agriculture, the environment and animal welfare are upheld is the single most important factor the UK Government should consider in determining which countries to pursue free trade agreements with (30%). This is closely followed by bringing as much economic benefit as possible to the UK economy as a whole (28%). At 16%, ensuring the countries we trade with align with the UK's values is the next most likely to be viewed as the most important factor, while providing the most choice and competition for British consumers is seen as the least important (7%). A further 17% of Britons are uncertain of their position and 2% of Britons believe something else is the single most important factor. These findings suggest that overall,

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What do you think is the single most important factor the UK Government should consider in determining which countries to pursue free trade agreements with?



the support for high standards and economic benefit are closely matched, but the combined strength of the prioritisation of high standards and values triumphs over the economic and consumer benefits made possible through free trade.

The gender differences in trade priorities are particularly interesting, with men (35%) more likely than women (23%) to prioritise the economic benefits of trade. In turn, women (34%) are more likely than men (25%) to prioritise upholding the UK's standards. Britons in the C2DE social category (23%) show higher levels of uncertainty in their trade priorities than those in the ABC1 social category (13%). However, it is notable that this disparity almost entirely manifests in higher levels of support for prioritising upholding standards among those in the ABC1 social category (32%), compared to those in the C2DE social category (25%).

Wales is the region most likely to prioritise the economic benefits of trade (37%) and ensuring countries we trade with align with our values (20%). In turn, residents in Wales are the least likely to prioritise providing choice and competition for British consumers (4%). Meanwhile, Britons in the North East (34%) and the East of England (34%) are the most likely to prioritise upholding UK standards, while residents in Northern Ireland are the least likely to do so (18%). Liberal Democrat voters (40%) and Labour voters (37%) are the most likely to prioritise upholding the UK's standards, over SNP voters (33%) and Conservative voters (29%). In turn, Conservative voters (37%) and Liberal Democrat voters (32%) are the most likely to prioritise seeking economic benefits from trade, while SNP voters (25%) and Labour voters (23%) are the least. Conservative voters (17%) are also the most likely to prioritise ensuring the countries we trade with align with UK values. Meanwhile, SNP voters (22%) are the most likely to be uncertain of their priorities.

Migration as Foreign Policy Tool

One of the most striking manifestations of the Global Britain project has been the recasting of migration as a strategic foreign policy instrument, with several tangible policy decisions including migration pathways. It is difficult to separate this development from the fact that the UK Government has implemented a new immigration policy framework in the aftermath of the UK's departure from the European Union. In this year's survey, we interrogated Britons' support for two of the recent migration pathway programmes the UK has enacted – namely, the scheme for British Nationals (Overseas) passport-holders in Hong Kong, and the evacuation programme for Afghanistan allied partners and their families.

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British Nationals (Overseas) in Hong Kong

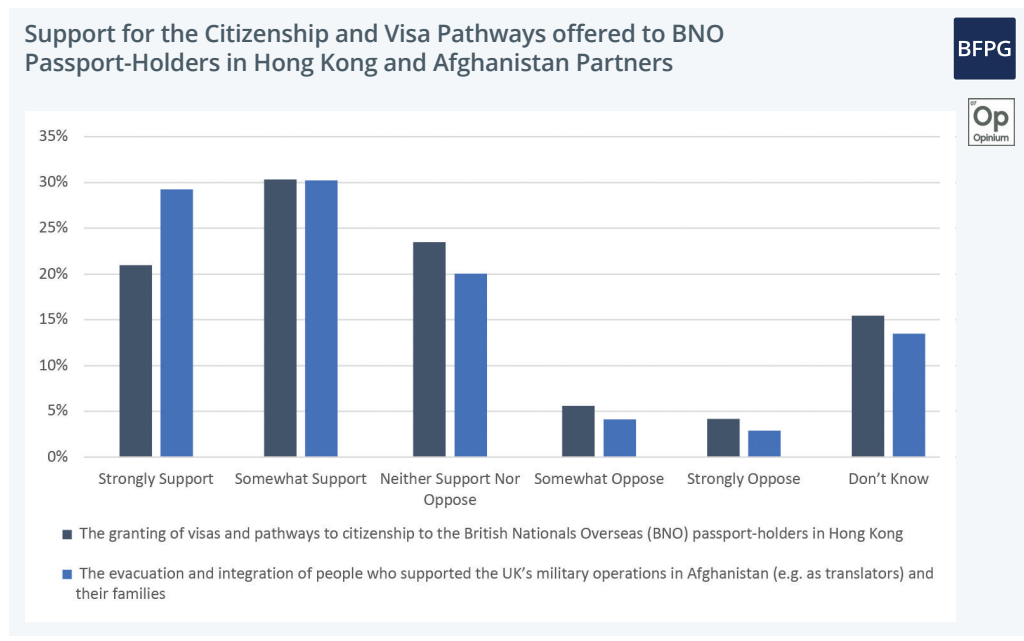
Overall, the majority of Britons (51%) support the granting of visas and pathways to citizenship to British Nationals Overseas (BNO) passport-holders in Hong Kong in response to China's increasing interventions in the territory's governance. This includes 30% of Britons who somewhat support this and 21% who strongly support it. Just 10% of Britons oppose the decision, with only 4% strongly opposing it. However, 23% of Britons neither support nor oppose the granting of these visas and pathways to citizenship and 15% of Britons are uncertain of their views. The BFPG's focus groups reveal little knowledge about the scheme and a perception that very few arrivals have reached the UK, despite the latest UK Government figures capturing almost 100,000 BNO arrivals.³

There are sharp demographic divides in levels of support for these visas and pathways to citizenship, with men (58%) more supportive of these measures than women (45%). In part, this is driven by the fact women (21%) are more uncertain of their view of these measures than men (9%). However, it is still the case that men are more likely (25%) than women (18%) to strongly support granting visa and pathways to citizenships to BNO migrants, and that women (11%) are slightly more opposed than men (9%) to these measures. Britons from higher socio-economic backgrounds are more inclined to support these measures than those from lower socio-economic backgrounds, with 58% of those in the ABC1 social grade supportive of these measures, compared to 41% of those in the C2DE social grade. Graduates (64%) are also more supportive than non-graduates (44%).

In terms of political perspectives, Conservative-Remain voters (67%) are the most supportive of the granting of visas and pathways to citizenship to BNO passport-holders, followed by Labour-Remain voters (62%) and Conservative-Leave voters (52%), while Labour-Leave voters (40%) are by far the least supportive. Support is also significantly higher among those with high (68%) or mid (52%) levels of political attention relative to those with low levels of political attention (21%).

Afghanistan Partner Evacuations

Britons are more supportive of the evacuation and integration of people who supported the UK's military operations in Afghanistan (e.g. as translators), and their families, following the allied withdrawal from the region (59%) than of creating visa and pathways to citizenship for



³ Home Office. (2022, March 3). How many people come to the UK each year (including visitors)? Retrieved from: <https://www.gov.uk/government/statistics/immigration-statistics-year-ending-december-2021/how-many-people-come-to-the-uk-each-year-including-visitors#british-national-overseas-bno-route>

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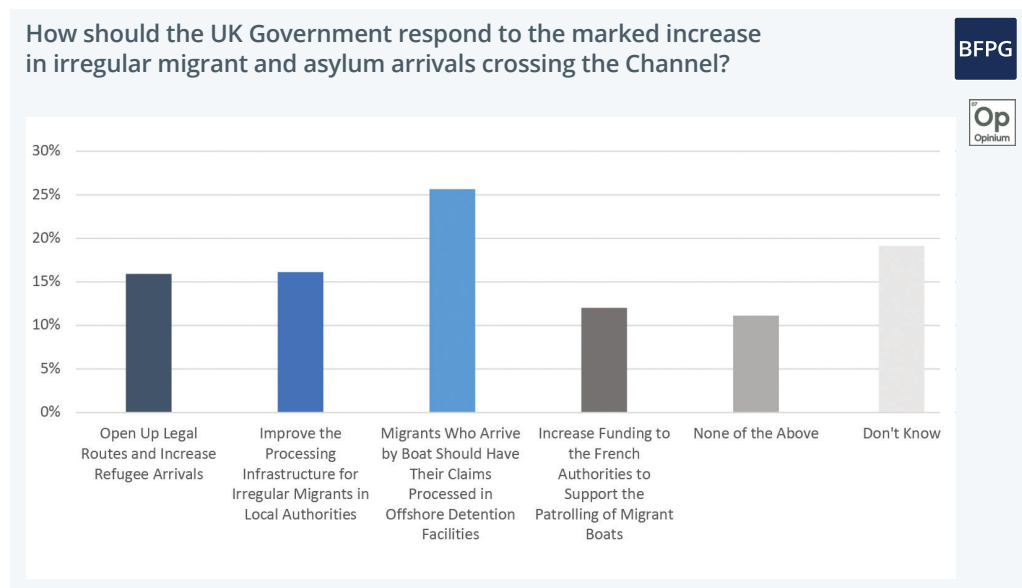
BNO passport-holders (51%). 29% of Britons strongly support the evacuation and integration of these individuals, while just 7% are opposed to this. However, 20% of Britons neither support nor oppose the move and 13% of Britons are uncertain of their position. This relatively greater support may pertain to the higher levels of media coverage for the Afghanistan evacuation, which the BFPG's focus groups suggests was an issue of significant importance for Britons with widespread exposure to the plight of refugees.

Demographic distinctions in levels of support for the evacuation and integration of those who supported UK military operations in Afghanistan mirror support for visas citizenship pathways for BNO migrants, with men, graduates, and those from higher socio-economic backgrounds more supportive of supporting these Afghans. Furthermore, over-55s (70%) are more likely to be supportive than under-35s (54%) or 35-54-year-olds (52%). In terms of political affiliations, Liberal Democrat voters (73%) and SNP voters (73%) are the most supportive of this initiative, while Labour voters (66%) and Conservative voters (62%) are the least. Remain voters (71%) are also more supportive than Leave voters (56%).

Responses to Irregular Migration to the UK

In the 2021 Annual Survey, we asked a question about how best the UK Government should respond to the increased number of irregular arrivals of migrants and asylum-seekers crossing the Channel. The issue continues to remain pertinent, although several of the options we surveyed last year have subsequently been ruled out. This year we therefore proposed a new range of potentially viable options, and again we find that there is no clear consensus on the best approach for the UK Government to take. The largest proportion of Britons believe that migrants who arrive by boat should have their claims processed in offshore detention facilities (26%). However, increasing the number of asylum-seekers and humanitarian arrivals we accept so that more migrants can pursue legal routes (16%) and expanding and improving infrastructure to better receive and process irregular migrants in local authorities near the English coast are the next most popular solutions (16%). At 12%, increasing funding to the French authorities to support the patrolling and interception of migrant boats from the French coastline is the least popular option. However, 19% of Britons are unsure of their position and 11% do not support any of the proposed options.

The age disparities in views on migration are particularly notable. For example, while processing migrants in offshore detention facilities is the most popular solution among over-55s (37%) and 35-54-year-olds (23%), it is the least popular solution among under-35s (12%). Instead, under-



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35s favour increasing the number of asylum-seekers and humanitarian arrivals we accept (22%) or expanding and improving infrastructure to better receive and process irregular migrants (22%). In comparison, just 13% of citizens aged over-55s support each of these options. Similarly, non-graduates (28%) are more supportive of processing migrants' claims in offshore detention facilities than graduates (21%). Instead graduates favour increasing the number of asylum seekers and humanitarian arrivals we accept (24%).

Political party affiliation is also a significant determinant of views on migration, with 44% of Conservative voters supporting processing migrants in offshore detention facilities, in comparison to 20% of SNP voters, 14% of Labour voters and 13% of Liberal Democrat voters. In turn, Labour voters are the most likely to support the UK increasing the number of asylum-seekers and humanitarian arrivals we accept (28%) and to support expanding and improving infrastructure to better receive and process irregular migrants (25%). The former is also supported by 26% of Liberal Democrat voters and 21% of SNP voters but just 6% of Conservative voters.

When political partisanship and referendum voting are brought together, these distinctions are brought even more sharply into focus, with 50% of Conservative-Leave voters supporting processing migrants' claims in offshore detention facilities, compared to 10% of Labour-Remain voters. Furthermore, 35% of Labour-Remain voters support increasing the number of migrants we accept, compared to 14% of Labour-Leave voters, 12% of Conservative-Remain voters and 3% of Conservative-Leave voters.

The International Order

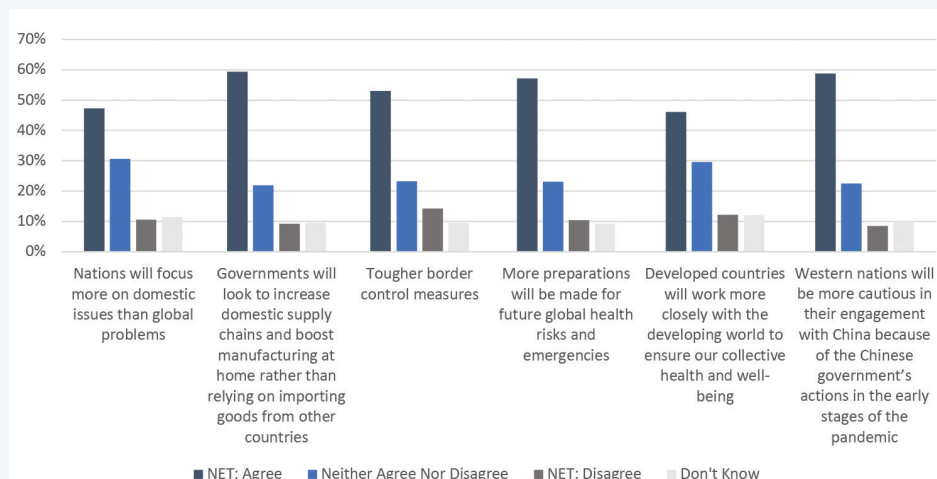
The Impacts of the Pandemic

The coronavirus pandemic has been experienced by the British people as a story with very prominent domestic and international angles. The BFPG's focus groups suggest that the British people instinctively feel that there will be some longer-term consequences of the pandemic on both fronts, and this year we have included a question to capture the salience of a range of different scenarios. It is clear from these findings that Britons believe that the pandemic will precipitate a strengthening of the nation-state and some degree of disruption from the era of peak globalisation and international connectivity.

A majority of Britons believe that nations will onshore their supply chains and seek to boost manufacturing capacity at home (59%), as well as imposing tougher border control measures over the longer-term (53%). In terms of international affairs, a majority of Britons also believe that Western nations will pursue more cautious approaches towards China due to its actions in the early phases of the pandemic (59%), and that greater preparations will be made for future global health emergencies (57%). Britons are less convinced about the likelihood of developing and developed nations working more closely together in the pandemic's aftermath (46%) and the degree to which nations will fundamentally turn inwards and solely focus on domestic matters (47%). The consequence of these views, when taken together, is an expectation that governments will pursue a degree of greater self-interest and emphasise resilience and sovereignty, but that the pandemic will not pose an existential threat to the pre-pandemic world of international integration.

It should be noted that many Britons are unsure of their positions on these issues. There also appears to be a significant degree of consistency in the demographic distinctions on these responses, particularly in terms of political affiliations, with Conservative voters most inclined to perceive a wide range of impacts from the pandemic compared to other citizens. Below, we explore the demographic nuances in further detail.

Thinking about the lasting impact of the pandemic and looking to the future to what extent do you agree or disagree with the following?



5. The International Order

Nations Turning Inwards

Overall, 47% of Britons believe that the pandemic will mean that nations will focus more closely on domestic issues than global problems, with 10% of Britons strongly agreeing that this is the case. Just 10% of Britons actively do not believe nations will focus more on domestic rather than global issues. However, 31% of Britons neither agree to disagree with this and 11% of Britons are unsure of their views. Older Britons are more likely than younger Britons to believe nations will focus inwards, with 51% of over-55s believing this, compared to 45% of both 35-54-year-olds and under-35s. This view is most commonly held in London (52%), and least commonly held in Northern Ireland (39%) and Wales (38%). In terms of voting preferences, Conservative voters (54%), Liberal Democrat voters (52%) and Labour voters (49%) are more likely than SNP voters (36%) to believe nations will now focus more on domestic rather than global issues.

Onshoring of Supply Chains

A majority (59%) of Britons believe that governments will seek to onshore supply chains and boost manufacturing at home rather than relying on importing goods from other countries as a result of the pandemic, including 19% of Britons who strongly agree that this is the case. Only 9% of Britons do not think that governments will now look to strengthen domestic supply chains and boost manufacturing at home. However, 22% of Britons neither agree nor disagree with this statement, while 10% of Britons are unsure of their position. Britons over the age of 55 years (67%) are significantly more likely than under-35s (55%) and 34-54-year-olds (54%) to believe that governments will focus on domestic supply chains and boosting manufacturing at home. Residents in London are also particularly likely to believe this (65%), while residents in the North East of England are the least likely to do so (46%). Conservative voters are significantly more likely to hold this view than voters for the other three parties (72% vs. 55% of other voters). Leave voters (66%) are also more likely to believe this than Remain voters (59%).

Tougher Border Control Measures

A majority of Britons (53%) believe that the pandemic will result in tougher border control measures in the future, including 22% of Britons who strongly agree with this. Only 14% of Britons do not believe this to be the case. However, 23% of Britons neither agree nor disagree with the statement and 10% of Britons are unsure of their position.

The demographic distinctions in belief that the pandemic will result in tougher border control measures are more pronounced than they are for many other issue areas. For example, 62% of over-55s agree that the pandemic will lead to tougher border control measures, compared to 50% of 35-to-54-year-olds and 43% of under-35s. Furthermore, non-graduates (56%) are more likely to believe this than graduates (49%), as are women (55%) relative to men (51%). There is broad alignment between SNP voters (43%), Labour voters (42%) and Liberal Democrat voters (42%) in the extent to which they believe the pandemic will result in tougher border control measures. However, Conservative voters, once again, stand out for their predictions for what the long-term impacts of the pandemic will be, with 71% of Conservative voters believing the pandemic will result in tougher border control measures.

We know that these groups are also the most inclined to support tougher immigration policies, and therefore there may be a degree of wishful thinking at play in these results. It is also certainly the case that these citizens would have been more likely to be picking up on messages about border closures in the news during the pandemic and therefore devoting higher levels of political attention to these themes.

Preparations for Global Health Risks

A majority of Britons believe that the coronavirus pandemic will compel more preparations to be made for future global health risks and emergencies (57%), a view that is strongly held by 16% of Britons. Only 10% of Britons do not believe it will mean more preparation will be made around global health risks. However, 23% of Britons neither agree nor disagree with this statement,

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and a further 9% do not know or are unsure about their views on this subject. Britons in the ABC1 social grade (61%) are more likely than those in the C2DE social grade (51%) to believe this, as are over-55s (64%) relative to under-35s (55%) and 35-54-year-olds (51%). Residents in Northern Ireland (66%) are the most likely to believe the pandemic will lead to more preparations in this area, while residents in the North West of England (52%) are the least likely to do so. Conservative voters (67%) are, again, the most likely to believe this statement, followed by Liberal Democrat voters (61%) and Labour voters (56%). At 44%, SNP voters are the least likely to believe the pandemic will lead to more preparations for future global health risks.

Collaboration Between Developed and Developing Nations

While, at 46%, a large plurality of Britons believe that developed nations will work more closely with the developing world to ensure our collective health and wellbeing as a result of the pandemic, this is the least widely supported prediction of those posed. This is due to the fact that the largest proportion of Britons are unsure in their predictions about this question (12%) or are ambivalent about its outcomes (30%). 12% of Britons actively disagree that the pandemic will lead to these forms of cooperation between the developed and developing world.

Under-35s (51%) are the most likely to believe that the pandemic will lead to closer cooperation between the developed and developing world on collective health and wellbeing, followed by over-55s (46%) and 35-54-year-olds (42%). Liberal Democrat voters (54%) and Conservative voters (51%) are more likely to believe that the pandemic will lead to closer cooperation between the developed and developing world on collective health than Labour voters (45%) or SNP voters (36%). This view is particularly widely held by both Conservative voters under 35 years of age (59%) and Conservative-Remain voters (59%).

Caution in Engagement with China

Overall, 59% of Britons believe that Western nations will be more cautious in their engagement with China due to the Chinese Government's actions in the early stages of the pandemic, including 21% of Britons who strongly agree that this is the case. Just 9% of Britons do not believe that Western nations will now be more cautious in their engagement with China. However, 23% of Britons neither agree nor disagree, while 10% of Britons are unsure of the position.

Over-55s (65%) are the most likely to believe Western nations will now be more cautious in their engagement with China as a result of the pandemic, followed by under-35s (56%), while 35-54-year-olds (54%) are the least likely to believe this. The instinct for caution is most strongly held in Northern Ireland (68%) and least widely held in the West Midlands (53%). Conservative voters (72%) and Liberal Democrat voters (65%) are more likely than Labour voters (54%) or SNP voters (49%) to believe that Western nations will now be more cautious in their engagement with China. Leave voters (68%) are also more likely to believe this than Remain voters (57%).

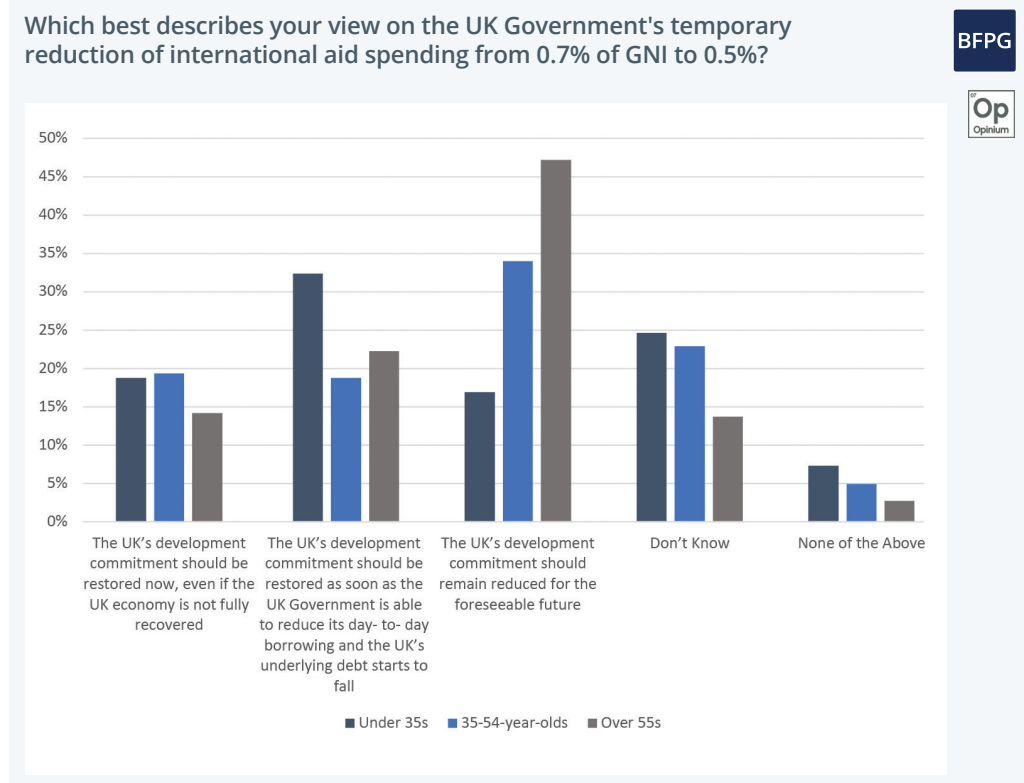
Restoring the UK's 0.7% of GNI Development Commitment

The UK's international development budget was reduced by the UK Government from 0.7% of GNI to 0.5% during the coronavirus pandemic, described as a temporary measure to be restored when the fiscal situation allowed. Even after this spending commitment reduction, the UK remains a leading global donor across a range of developmental areas, yet it is certainly the case that the act of implementing the reduction attracted some challenging political and media responses in the UK and amongst our allies. The UK Government committed to reinstating the 0.7% commitment in the foreword to the Integrated Review of the UK's Security, Defence, Development and Foreign Policy, however it is evident that Government finances have come under further pressure since that time due to the cost-of-living and energy crises.

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The BFPG's 2021 survey indicated that a majority of Britons accepted the argument for temporarily reducing the 0.7% commitment. This year, we find that a quarter of Britons (24%) support the Integrated Review message to restore the UK's development commitment as soon as the UK Government is able to reduce its day-to-day borrowing and the nation's underlying debt starts to fall. This compares to 17% who believe the UK's development commitment should be restored now, even if the UK economy is not fully recovered, and twice as many (34%) Britons who now believe the UK's development commitment should remain reduced for the foreseeable future. A fifth of Britons are either unsure of their position (20%) and 5% do not support any of the options.

The age disparities in support for reductions in aid spending are particularly prominent, with 47% of over-55s believing the UK's development commitment should remain reduced for the foreseeable future, compared to 34% of 35-54-year-olds and 17% of under-35s. In turn, under-35s are the most likely to believe the UK's development commitment should be restored when certain thresholds are met (32%). In terms of political affiliation, Conservative voters (53%), and particularly Conservative voters over 45 years of age (58%) are the most likely to believe that the UK's development commitment should remain reduced for the foreseeable future, and are over twice as likely to do so as Liberal Democrat voters (23%) or Labour voters (23%). Meanwhile, Liberal Democrat voters are the most likely to believe the UK's development commitment should be restored once certain economic conditions are met (32%) and also to believe it should be restored now (29%).



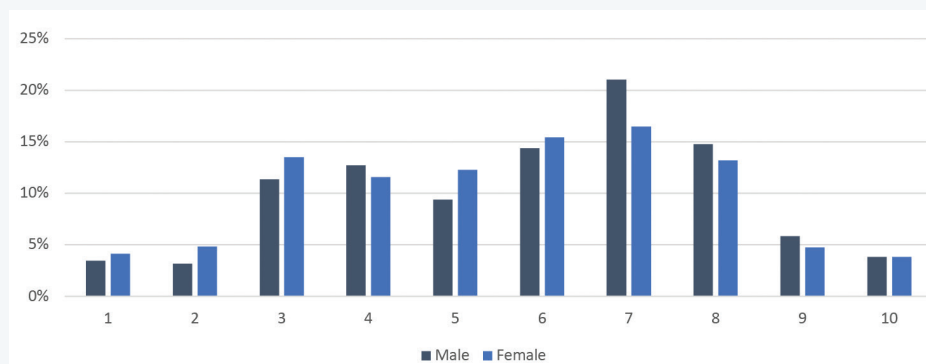
National Security

Perceptions of Security

The BFGP has been monitoring perceptions of generalised security over recent years, during a period of considerable geopolitical dynamism and the all-encompassing presence of the pandemic. In February 2022, when asked about the current direction of travel of world events, Britons were marginally more likely to self-report as feeling 'safe' (23%) than unsafe (20%). Interestingly, while the proportion of Britons who feel actively unsafe has stayed much the same relative to 2021, the proportion who feel actively safe has risen five percentage points, to 23%, from 18% in 2021. This suggests that the pandemic had played an active role in fostering personalised insecurity. Evidently, however, these figures may be influenced by the Russian invasion of Ukraine, and the BFGP will continue to observe the dynamism in these perceptions over the coming year.

As things stood in February, however, the demographic distinctions on perceptions of insecurity remained relatively consistent with longer-term trends. Over-55s are more likely to feel unsafe (25%) than safe (19%), and more likely to feel unsafe than 35-54-year-olds (19%) and under-35s (15%). In turn, under-35s are the most likely to feel safe (32%). Women (22%) are also more likely than men (18%) to feel unsafe – a finding that has been consonant across multiple survey years. In geographic terms, residents in Northern Ireland are the most likely to feel safe (34%) and the least likely to feel unsafe (13%). Meanwhile, residents in the North East of England (28%) are the most likely to feel unsafe, while residents in Yorkshire and Humberside are the least likely to feel safe (14%). Interestingly, residents in rural areas (23%) and suburban areas (22%) are more likely to feel unsafe than residents in urban areas (17%). In turn, residents in urban areas (29%) are more likely to feel safe than those living in suburban areas (22%) or rural areas (14%).

Thinking about the direction of travel in terms of world events, how safe or unsafe do you feel today, on a scale of 1-10, with 10 being extremely safe, and 1 being extremely unsafe?



Perceptions of Security Threats

Climate change continues to be seen by the British people as one of the most prominent threats facing the vital interests of the UK in the coming decade, selected as a priority risk by 42% of Britons. This is followed by international terrorism (36%), the rise of China as a world power (34%), and cyber-attacks from other countries (31%). Other issues that commanded relatively lower levels of interest included the emergence of a new global health pandemic (25%), a new international migration crisis (19%), the break-up of the United Kingdom (17%), foreign interference in UK politics and democracy (16%), and a nuclear arms race (12%). Liberal freedoms

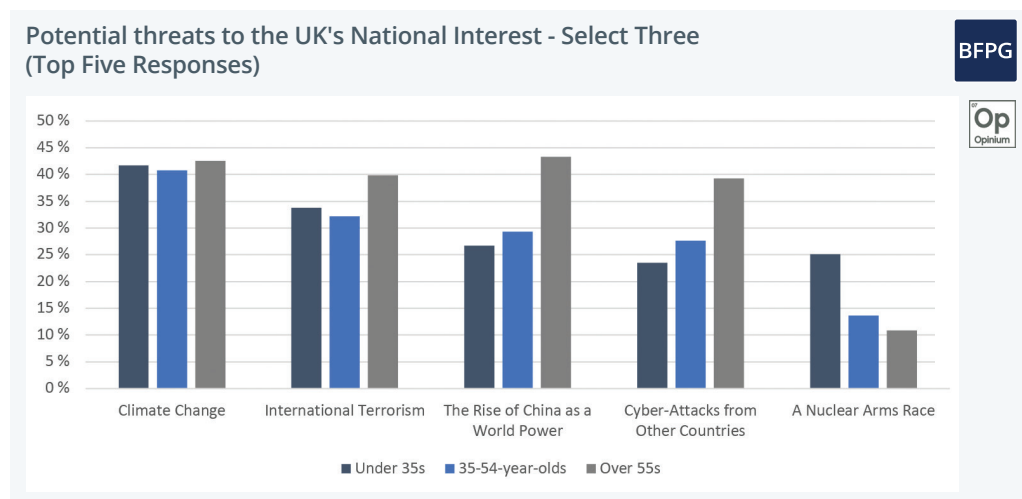
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being rolled back in democratic countries (12%) and the automation of jobs and economic change (11%) are viewed as the least pressing threats. A further 8% of Britons felt none of the options captured the threats they perceive.

Britons aged over 55 years are consistently more likely to be concerned about any of the threats than their younger counterparts. A particularly stark disparity emerges in concern about the rise of China as a world power, which is regarded as one of the three biggest threats to the UK by 43% of over-55s, compared to 29% of 35-54-year-olds and 27% of under-35s. The major exception to this trend is concern about a nuclear arms race, which is viewed by 25% of under-35s as one of the biggest threats to the UK, compared to 14% of 35-54-year-olds and 11% of over-55s. This is curious because most under-35s would not have grown up in the spectre of the Cold War, and the survey was undertaken prior to Russia's invasion of Ukraine, when a contemporary discussion around nuclear weapons has become most prominent.

The extent to which climate change is viewed as one of the biggest threats provides the largest dividing line around levels of education, with graduates (48%) 10 percentage points more likely than non-graduates (38%) to view climate change one of the biggest threats. The sense of urgency around climate change also highlights divisions between party affiliations, with the majority of Labour (55%), Liberal Democrat (54%) and SNP voters (50%) viewing climate change as one of the biggest threats to the UK and just 33% of Conservative voters agreeing. In turn, Conservative voters are inclined to be agitated about the risk of international terrorism (46%), to a considerably greater degree than Labour (28%), SNP (27%) and Liberal Democrat voters (24%). Conservative voters are also the most likely set of voters to view the rise of China as a world power as one of the biggest threats (44%), and to view an international migration crisis as such (28%). Meanwhile, the break-up of the United Kingdom offers the sharpest distinctions around socio-economic grade, with Britons in the ABC1 social grade (19%) six percentage points more likely than those in the C2D1 social grade (13%) to view this as one of the biggest threats.

In previous years, we have asked this question in a different way, which allowed Britons to individually assess the significance of each threat rather than choose between them. This demonstrated that Britons are attuned to a wide range of risks, which remained relatively consistent over a turbulent period – with the greatest dynamism in the evolution of concerns about the pandemic and terrorism. In last year's survey, cyber-attacks from other countries attracted the highest level of recognition for its potential to threaten the UK (84%), and climate change was only at the fourth position in terms of overall threat perception recognition. The reframing of this question as we have done this year indicates that the presentation of a trade-off and selective lens to support the relative assessment of threats provides greater clarity in terms of the visceral salience of these issues. Certainly, domestic and international events – such as the staging of the COP26 Summit in October 2021 and the extensive media and political coverage around the net-zero transition – will have also played a role in shaping the responses to this question.



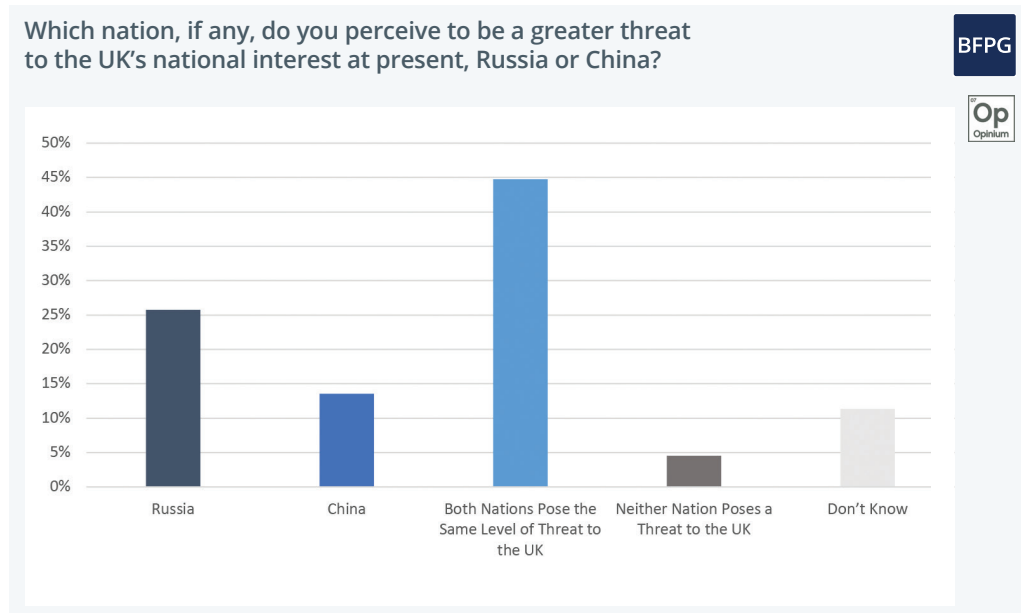
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Assessment of the UK's Strategic Rivals

Britons have long regarded Russia as the UK's primary security threat, however in recent years, the risks posed by China to Britain's interests and the wider liberal world order by the rise of China have come more sharply into view. The 'reset' in perceptions in Westminster with regards to Chinese engagement have been mirrored by rising concerns amongst the British people; what has been less certain is the degree of salience the threat posed by China commands to the considerably more established risks understood to be presented by our old Cold War foe. As such, our survey this year asked Britons to choose between the two countries and identify the greatest level of risk. We find that 45% of Britons now believe that Russia and China pose the same level of threat to the UK, although Britons are more inclined to believe Russia is a bigger threat (26%) than to believe China is (14%). A small proportion of Britons believe neither nation poses a threat to the UK (5%). A further 11% of Britons are unsure of their position, which is a relatively low percentage in the context of the survey as a whole.

There are some interesting political and regional differences in perceptions of the relative threats posed by Russia and China. Residents in the East Midlands are the most likely to view Russia as the greater threat (29%), while residents in the East of England are the least (20%). However, it is residents in Northern Ireland who are most likely to view China as the greater threat (20%), while residents in West Midlands are the least (10%). Furthermore, residents in rural areas (17%) are more likely than residents in suburban areas (13%) or urban areas (12%) to view China as a greater threat.

It is also valuable to examine the distinctions on this question between political and EU Referendum voting groups. Britons who voted to Remain in the EU in the 2016 Referendum are more likely to view Russia as a greater threat than China (31%) than those who voted to Leave the EU (21%). Meanwhile, Leave voters (16%) are more likely than Remain voters (12%) to believe that China poses the bigger threat. Leave voters (52%) are also more likely than Remain voters (44%) to believe the two nations pose equal levels of threat. This generates interesting divergences in views within parties, particularly among Conservative voters, with Conservative-Remain voters (36%) almost twice as likely as Conservative-Leave voters (19%) to view Russia as the bigger threat. This may reflect a relative lack of investment in the European security theatre, a reaction to the evidence of attempted Russian interference in the EU Referendum itself, or something broader in terms of how these Britons regard the international world order. The BFPG intends to conduct further research into this thematic area over the coming year.



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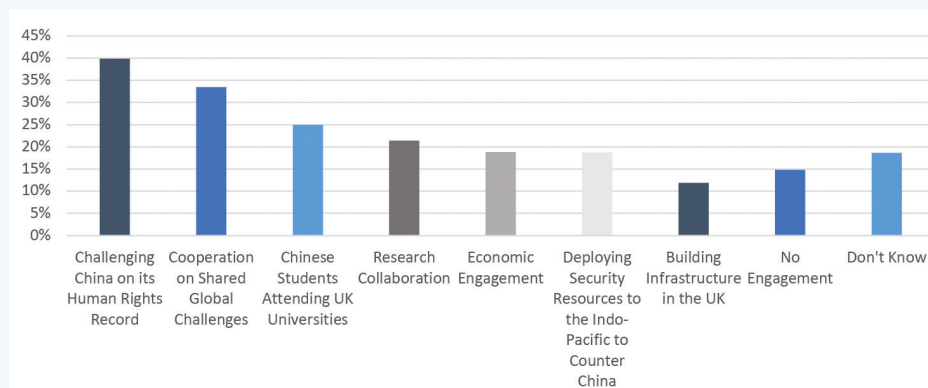
UK-China Relations

Britons continue to prioritise a more combative relationship with China, which emphasises the upholding of our values and deprioritises economic cooperation. Of all the forms of engagement the UK could pursue with China, Britons are most supportive of challenging China on its human rights record (40%). The second most favoured form of engagement is cooperating on shared global challenges, such as climate change (33%). Academic cooperation is the next most widely supported, with 25% of Britons supporting Chinese students attending UK universities and higher education and 21% of Britons supporting research collaboration between the two nations. Meanwhile, less than a fifth (19%) of Britons support Chinese economic engagement and financial investment in the UK and just 12% support Chinese funding for British infrastructure projects. It is also the case that 15% of Britons do not support the UK Government having any engagement with China whatsoever. It is notable that this increasingly tough stance on UK-China engagement is not also matched by a desire to pursue a more proactive military posture towards China, with only 19% of Britons supporting the deployment of security resources to respond to China's increasingly aggressive posture in the Indo-Pacific.

These findings are remarkably similar to the results of 2021, with relative levels of support for each form of engagement remaining the same, with challenging China on its human rights record the most popular form of engagement in 2021 (40%) and building infrastructure in the UK the least popular form of engagement (13%). The primary area of divergence is in levels of support for values-based and academic cooperation with China. Support for cooperation on shared global challenges such as climate change has fallen from 38% in 2021 to 33% in 2022, in the aftermath of the COP26 Summit which President Xi did not attend, while support for Chinese students attending UK universities has fallen from 30% in 2021 to 25% in 2022 and support for research collaboration with China has fallen from 27% in 2021 to 21% in 2022. This indicates that the trend has been towards a hardening of public opinion about China overall, with the areas supporting more constructive forms of collaboration and partnerships the most vulnerable to erosion over the past year.

Looking demographically, we can observe that women (17%) are more likely than men (13%) to not support the UK Government pursuing any form collaborative relations with China and are therefore less likely to support each individual method of engagement with China. However, the starkest disparity lies in support for deploying security resources to contain China's aggression in the Indo-Pacific which is supported by 24% of men, compared to just 14% of women. Graduates and Britons from higher socio-economic backgrounds are also consistently more supportive of all forms of engagement with China than their counterparts. Considering

Which of the following types of engagement do you support the UK having with China in the future?



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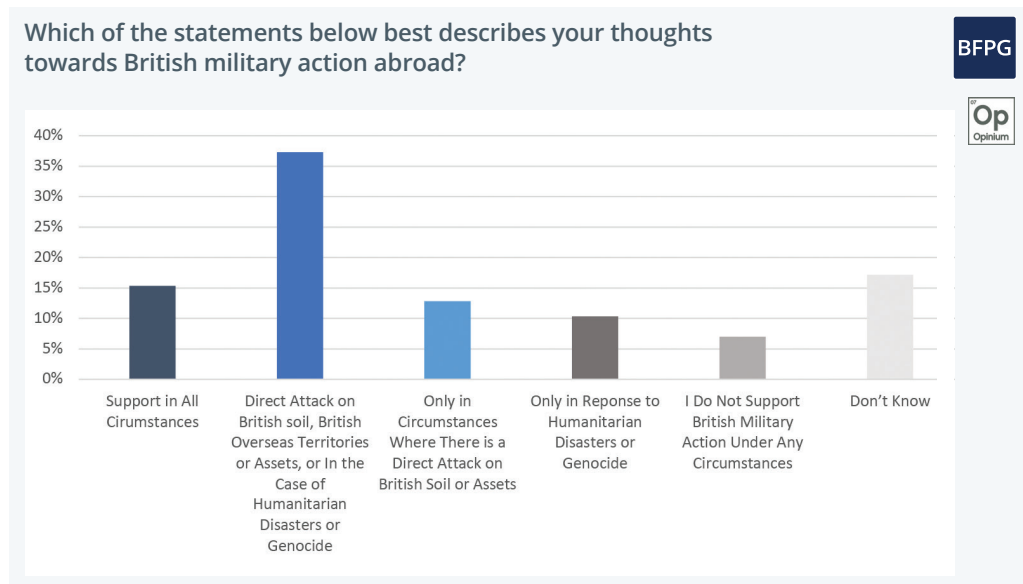
the generational distinctions, older Britons are the most likely to oppose all engagement with China, with 18% of over-55s opposing this, compared to 14% of 35-54-year-olds and 12% of under-35s. However, over-55s are also the most supportive of values-led engagement with China – 48% of over-55s support challenging China on its human rights record, compared to 37% of 35-54-year-olds and 31% of under-35s. Furthermore, 41% of over-55s support cooperating with China on shared global challenges, compared to 30% of under-35s and 28% of 35-54-year-olds.

Liberal Democrat voters are consistently the most supportive of all forms of engagement with China, closely followed by Labour voters and then Conservative voters, while SNP voters are consistently the least supportive. This is driven, in part, by high levels of uncertainty among SNP voters, 28% of whom are unsure which forms of engagement with China they would support. The sharpest disparity is in support for cooperation with China on shared global challenges which is supported by 50% of Liberal Democrat voters and 41% of Labour voters, compared to 30% of Conservative voters and 29% of SNP voters.

Scenarios for Military Interventionism

The BFPG has been interrogating public opinion about the deployment of the UK military across a range of different security-focused and humanitarian activities, and Britons' support for military interventionism has maintained a longer-term trend of becoming increasingly conditional, cautious and limited. Less than a sixth of Britons (15%) support British military action abroad unequivocally and regardless of circumstance. This represents a slight decline from the 18% of Britons who displayed the highest levels of trust in and support for British military action in 2021. The largest proportion of Britons do, however, support British military action across a range of specific and narrow circumstances: namely, where there is a direct attack on British soil, British Overseas Territories or assets, or in the case of humanitarian disasters or genocide (37%). A further 13% support British military action only in circumstances where there is a direct attack on British soil or assets and 10% of Britons support British military action only in response to humanitarian disasters or genocide. Levels of active opposition to the military remain low, with only 7% of Britons not supporting British military action under any circumstances, although this has risen from 4% in 2021. A further 17% of Britons are unsure of their preferences, up from 14% in 2021.

Younger Britons are more uncertain of their position on UK military interventionism, with 22% of under-35s and 20% of 35-54-year-olds unsure of their views, compared to 11% of over-55s.



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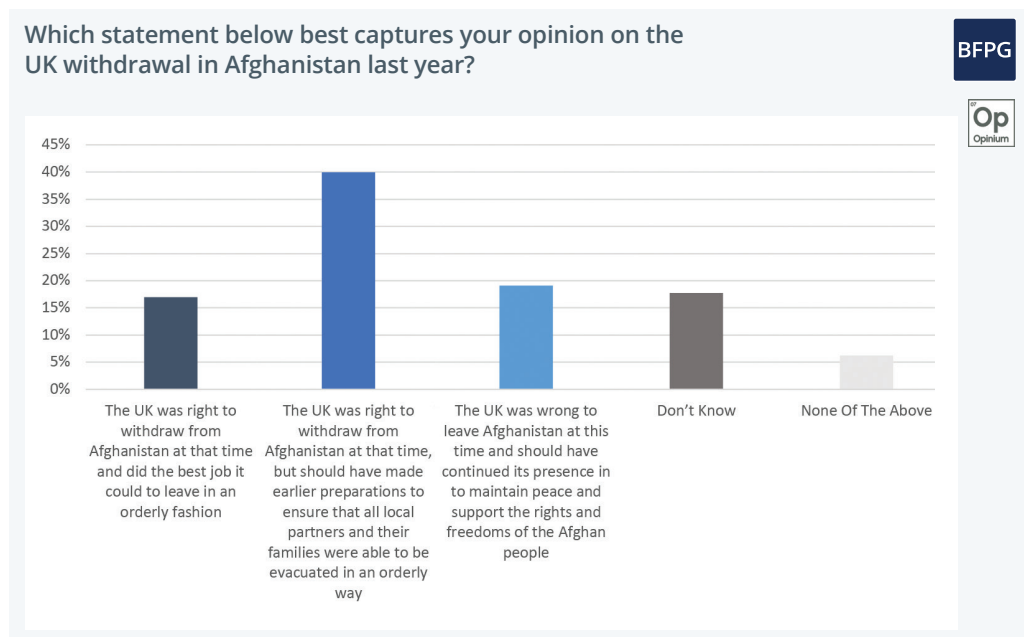
However, at 17%, under-35s are also slightly more inclined to support military interventionism regardless of circumstances, compared to 15% of 35-54-year-olds and 15% of over-55s. This suggests that the youthful position on military deployment is both simultaneously more likely to be uncertain or confident than that of the wider population.

Residents of Wales are the most likely to support military action abroad regardless of circumstance (23%), while residents in the South East of England are the least likely to (12%). At 18%, residents in the North West of England are the most likely to support military action only when there is a direct attack on British soil or assets – a defensive conception of military deployment – while residents in Scotland (17%) and Northern Ireland (16%) are the most likely to support British military action only in response to humanitarian disasters or genocide – a more values-based defence mindset. Residents in Northern Ireland are twice as likely as residents of any other region in the United Kingdom to oppose British military action in all circumstances (16%). Conservative voters are the most likely to support military action regardless of circumstances (22%), followed by Liberal Democrat voters (12%) and Labour voters (11%). At 7%, SNP voters are the least likely to support British military action abroad regardless of circumstance. The intersection of age and voting preferences further exacerbates divides, with 38% of Conservative voters under 35 years of age supporting military interventionism regardless of circumstances, compared to 7% of Labour voters over 45 years of age.

The Allied Afghanistan Withdrawal

Britons watched the withdrawal of American, British and allied troops from Afghanistan in the Summer of 2021 closely, and the BFPG's focus groups suggest that this was largely seen to be a chaotic, embarrassing and even shameful episode in modern Western history. This year, we have sought to understand whether Britons' shock and concern about the situation was driven more by a sentiment that the UK and our allies should have remained in Afghanistan, or by the nature and pace of the withdrawal process itself.

Our survey this year finds that 40% of Britons do believe that the UK was right to withdraw from Afghanistan at that time, but that we and our allies should have made earlier preparations to ensure that all local partners and their families were able to be evacuated in an orderly way. This compares to 19% of Britons who believe the UK was wrong to leave Afghanistan when it did and should have continued its presence in Afghanistan to maintain peace and support the rights and



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freedoms of the Afghan people. Only 17% of Britons praise the manner of departure, believing that the UK was right to withdraw from Afghanistan when it did and did the best job it could to leave in an orderly fashion. However, 18% of Britons are unsure of their position and a further 6% of Britons do not believe any of the statements captured their perspectives.

Over-55s (45%) are more likely than under-35s (39%) or 35-54-year-olds (34%) to believe that the UK was right to withdraw from Afghanistan when it did but that it should have made earlier preparations. Yet, older Britons are also the most likely to believe that the UK was right to withdraw when it did and did the best job it could to leave in an orderly fashion (21%). In turn, 35-54-year-olds (21%) and under-35s (19%) are slightly more likely than over-55s (17%) to believe the UK was wrong to leave Afghanistan at this time and should have continued its presence. However, large discrepancies emerge in levels of uncertainty in views on the UK's actions in Afghanistan, with 35-54-year-olds (22%) and under-35s (20%) showing higher levels of uncertainty than over-55s (12%). Regionally, residents in the North East of England (24%) and South West of England (24%) are the most inclined to believe the UK was right to leave when it did and did the best it could to leave in an orderly fashion. Meanwhile, residents in the East of England are the most likely to believe the UK was right to leave when it did but that it should have made better preparations (44%), while residents in Wales are the most likely to believe the UK was wrong to leave Afghanistan when it did (25%).

While a plurality across all voter groups believe the UK was right to withdraw from Afghanistan when it did, but that it should have made earlier preparations to improve evacuation of local partners and families, Conservative voters (27%) are significantly more likely than SNP voters (17%) or Labour (9%) or Liberal Democrat voters (9%) to believe the UK was right to withdraw at that time and did the best job it could to leave in an orderly fashion. Meanwhile, Liberal Democrat voters are the most likely to believe the UK should have continued its presence to maintain peace (33%), followed by Labour (24%), SNP (17%) and Conservative voters (15%). Remain voters (25%) are also more likely than Leave voters (16%) to believe the UK should have continued its presence in Afghanistan to maintain peace.

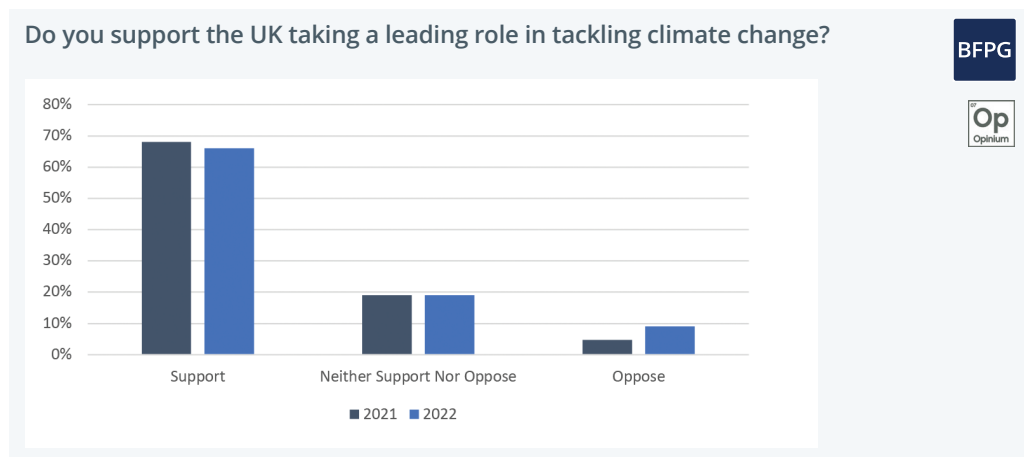
Climate Change and the Net-Zero Transition

The UK's Global Leadership on Climate Change

The UK's international leadership on climate action has been legitimised and reinforced by the extraordinary levels of resilient public support for this mission from the British people. It is one of the policy areas that has received the greatest level of consistent political investment over the past 12 years, despite the broader dynamism in leadership during this period. Overall, in 2022, two-thirds (66%) of Britons support the UK taking a leading international role in tackling climate change, including 35% of Britons who strongly support this. Only 9% of Britons actively oppose the UK taking on such a leadership role, with just 5% strongly in opposition. A further 19% of Britons neither support nor oppose it, while 6% of Britons are unsure of their position. This represents a slight decline in levels of support relative to 2021, where 68% of Britons the UK leading on climate change, while just 5% of Britons opposed this.

The sharpest demographic disparity in support for the UK taking a leading role in tackling climate change emerges in relation to education levels, with graduates (77%) 17 percentage points more likely than non-graduates (60%) to support the UK taking a leading role in tackling climate change. Support for the UK taking a leading role in climate action is also higher among under-35s (70%) than 35-54-year-olds (66%) and over-55s (64%). Under-35s (38%) are also more likely than 35-54-year-olds (37%) and over-55s (32%) to strongly support the nation's international leadership on climate action. Levels of support for British leadership on climate are particularly high in the East Midlands (73%) and London (72%) and lowest in Northern Ireland (59%), although it is residents in the North East of England (13%) who are most likely to actively oppose the UK assuming this role. Residents in urban areas show particularly high levels of support (70%) compared to those in suburban areas (65%) and rural areas (62%). Looking to politics, support for the UK taking a leading role in tackling climate change is particularly high among Labour-Remain voters (83%) and Labour voters under 35 years of age (80%), it is lowest among Conservative voters over 45 (58%) and Conservative-Leave voters (56%).

It is reasonable to expect that the intensification of the energy crisis in the UK and particularly the recent lifting of the energy price cap may precipitate some volatility in this longer-term trend of enduring support. The BFPG's focus groups over recent months suggest that Britons remain convinced of the significance of climate change and the need to transition towards net-zero, and that many regard the energy crisis as an impetus for a more radical investment in renewable energies. However, we are also beginning to observe a tendency amongst the British people



7. Climate Change and the Net-Zero Transition

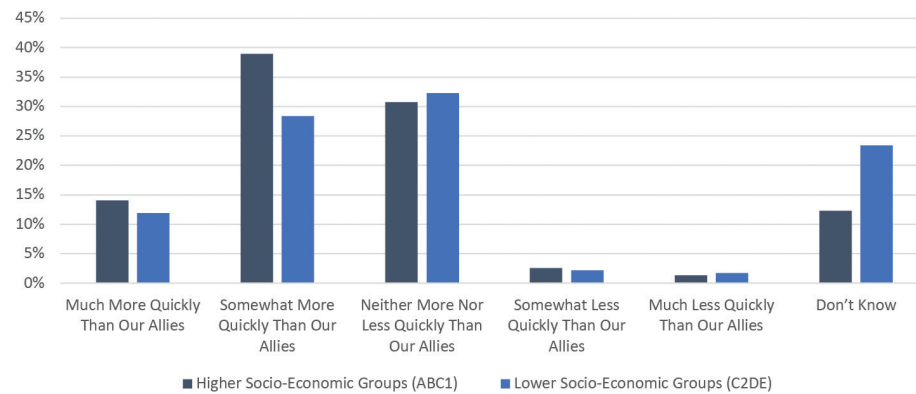
to feel less confident in the UK Government's capacity to shield Britons from the asymmetrical impacts of the transition and, within certain segments congruent with the demographics outlined above, to feel inclined to advocate towards a slower and less comprehensive approach towards net-zero and carbon neutrality.

The Net-Zero Transition

Nearly half of Britons (48%) believe that the UK taking an international leadership role in tackling climate change will mean the UK will need to undertake the domestic transition towards net-zero more quickly than our allies. Only 4% of Britons believe it will mean the UK will transition less quickly. A large proportion of the British public (31%) believe it will make no difference, and 17% are unsure of their position on this question.

In demographic terms, graduates (59%) are more likely than non-graduates (42%) to believe that the UK will need to domestically transition more quickly than its allies if it is to take a leadership role in tackling climate change, as are Britons in the ABC1 social grade (53%) relative to those in the C2DE social grade (40%). Britons in the C2DE social grade are also notably more likely to be uncertain and not know their position on this issue (23%) compared with those in the ABC1 social grade (12%). Politically, Remain voters (58%) are more likely than Leave voters (42%) to believe that leadership on climate change will require the UK to make the transition more quickly at home, as are Liberal Democrat voters (62%) and Labour voters (56%), relative to Conservative voters (47%) and SNP voters (39%). These findings highlight the political imperative for the governing Conservative Party to bring its voters along with them on the journey towards decarbonisation.

Do you think the UK choosing to take an international leadership role on climate change means the UK will need to domestically transition towards net-zero...



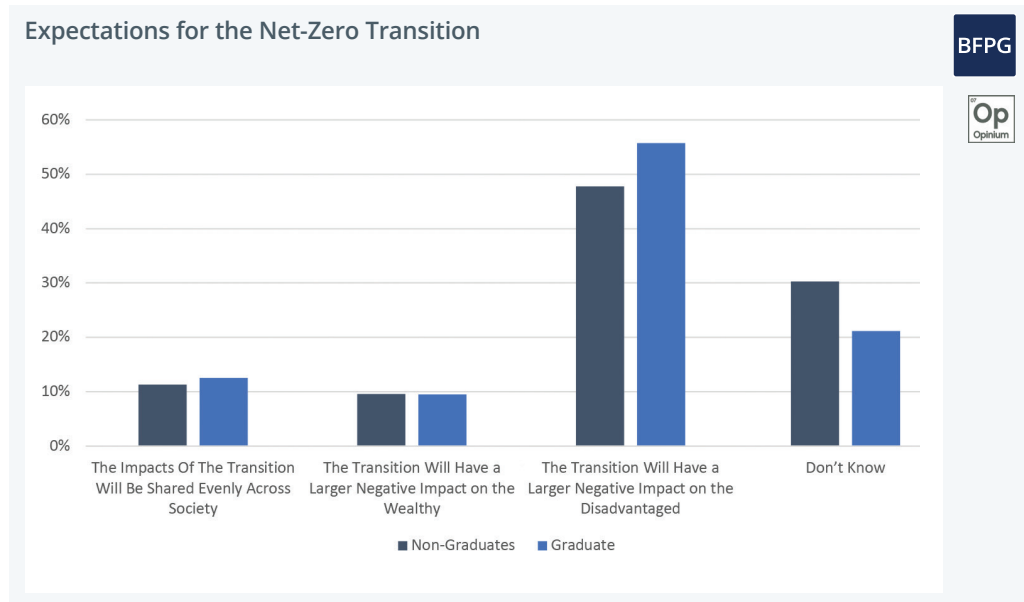
Impacts of the Net-Zero Transition

The net-zero transition is becoming increasingly more prominent in British public debate and the nuts and bolts of the shift to a decarbonised economy are beginning to be more visible, in the wake of the publication of the Government's 'Net Zero Strategy: Build Back Greener' document. Much of the media coverage of this strategic plan focused on the direct impacts on British citizens, highlighting the complex suite of actions that would need to be taken by Government, business and the British public. In our survey, we find that the majority of Britons (51%) believe the transition to net-zero, such as the need to shift to new forms of heating and transport, will have a larger negative impact on the disadvantaged in society than those with

7. Climate Change and the Net-Zero Transition

greater means. Only 12% of Britons believe the impacts will be shared evenly across society and 9% believe it will have a larger negative impact on the wealthy – presumably considering the outsized media coverage of the transition from private jets and other symbols of supreme wealth. A large proportion of Britons (27%) feel unsure about the impacts of the transition will be felt, and may well be persuaded to take a more concrete position on this subject as the current energy crisis persists and the realities of the transition are given more consistent attention.

Over-55s (65%) are more likely than by 35-54-year-olds (46%) and under-35s (36%) to believe that the net-zero transition will have a disproportionately negative impact on the most disadvantaged. In turn, under-35s (20%) are more likely than 35-54-year-olds (9%) and over-55s (3%) to believe it will have a larger negative impact on the wealthy. Interestingly, it is Britons in higher socio-economic grades (53%) who are more likely than those in lower socioeconomic grades (46%) to believe it will have a larger negative impact on the disadvantaged. Similarly, graduates (56%) are more likely to believe this than non-graduates (48%), while non-graduates are also more likely to be unsure (30%) about their view on this relative to graduates (21%). SNP voters (63%) are the most likely to believe the transition will have a larger impact on the disadvantaged, followed by Conservative voters (58%), while Labour voters (53%) and SNP voters (52%) are the least likely to believe this. Strikingly, there is very little variation in perspectives on this theme across EU Referendum voting cohorts.



The British Foreign Policy Group is an independent, non-partisan think tank dedicated to advancing the UK's global influence, at a crucial time in the nation's modern history. To achieve this, we produce dynamic events and high-quality research, and facilitate networks amongst stakeholders with a vested interest in Britain's international engagement.

Our core objective is to bridge the link between the domestic and international spheres – recognising that Britain's foreign policy choices and obstacles are shaped by our social landscape at home. Through pioneering research into the UK's social fabric, we seek to build understanding of the nuances of public opinion, and how our foreign policy can become more inclusive, responsive and relevant to citizens' lives.



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