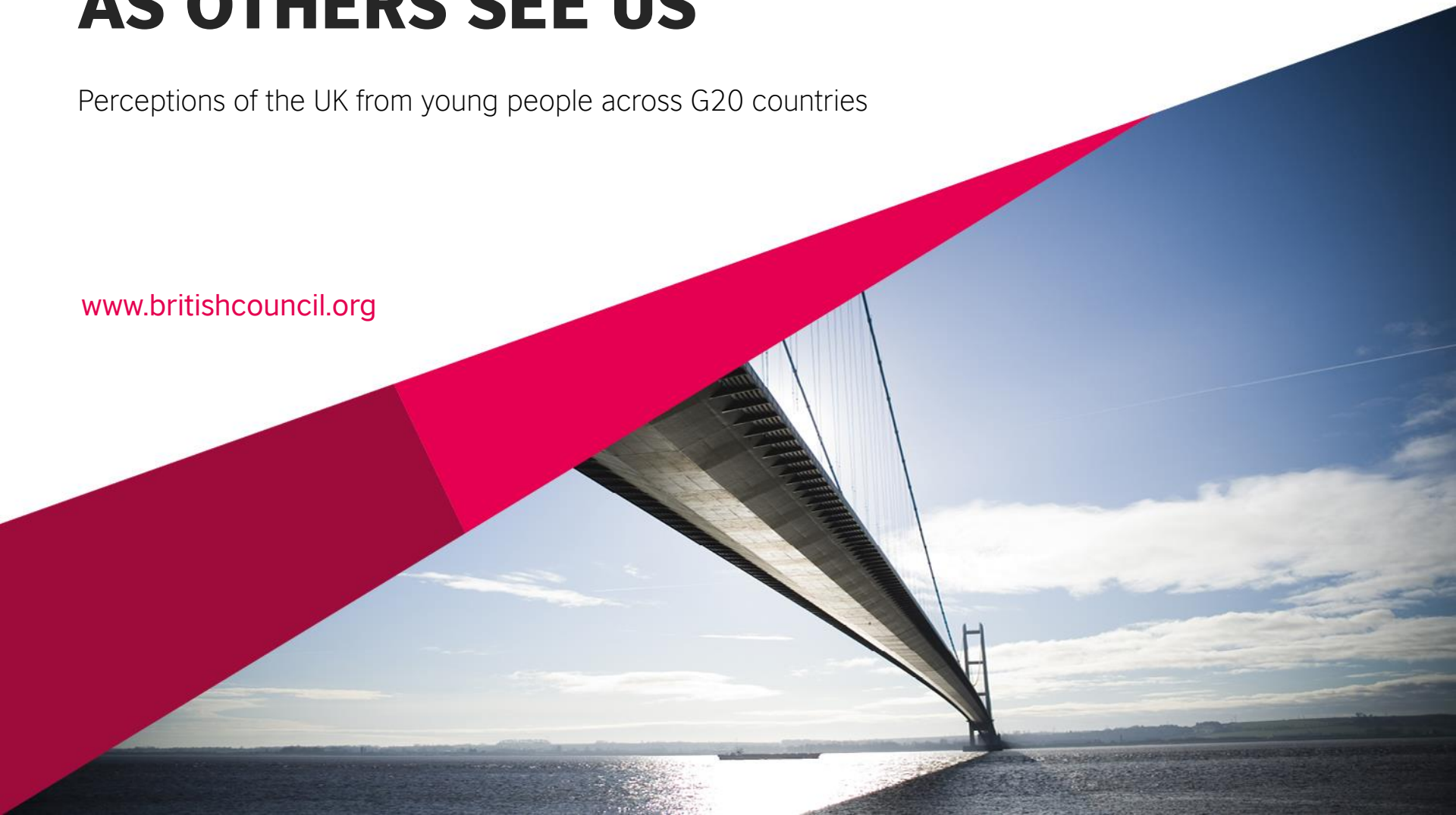




AS OTHERS SEE US

Perceptions of the UK from young people across G20 countries

www.britishcouncil.org



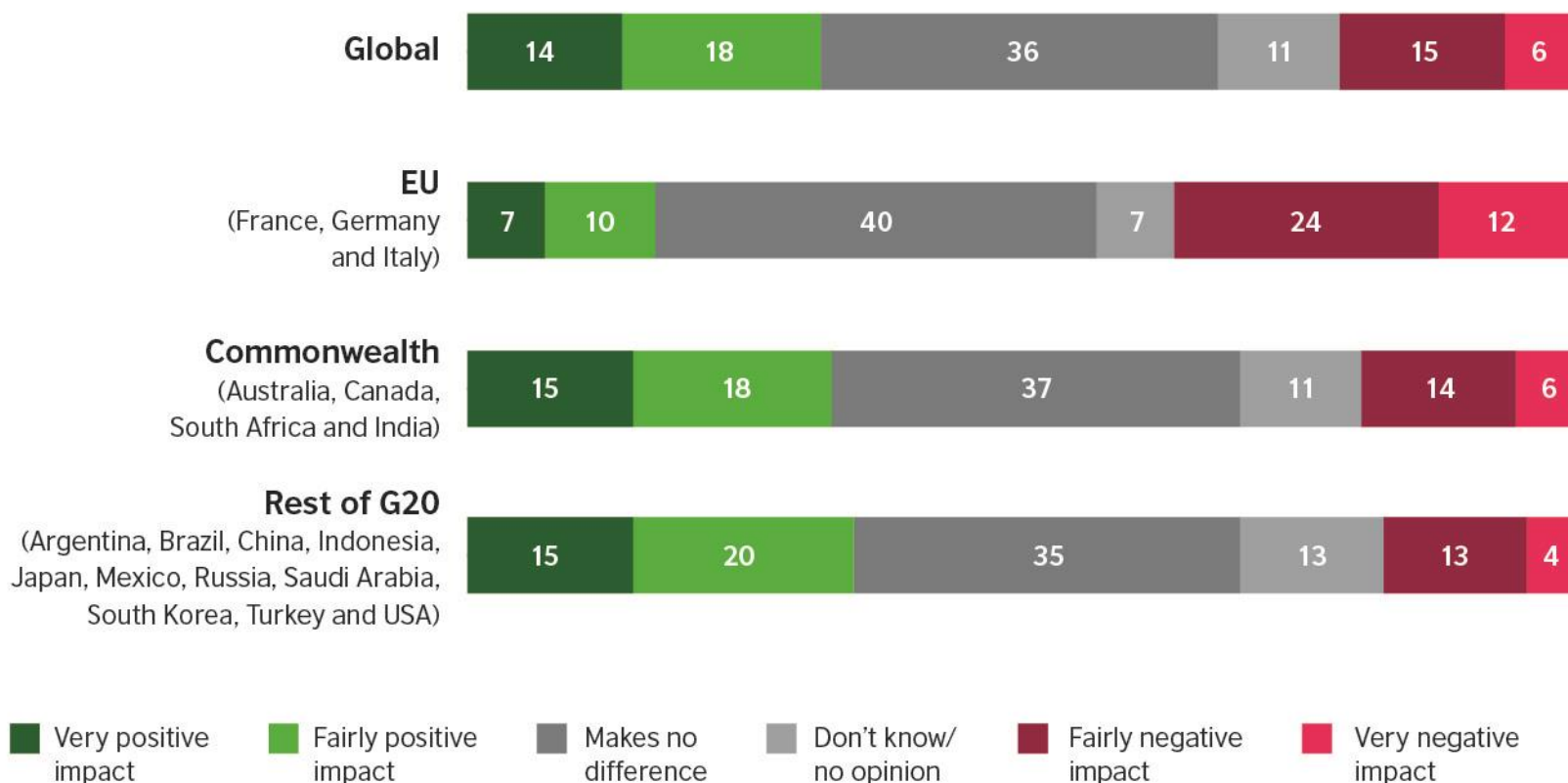
OBJECTIVES AND METHODOLOGY

- The objective of this research is to understand what contributes to educated Millennials' appraisal of a country's attractiveness, and in particular the attractiveness of the UK compared to the rest of the G20 countries - its closest economic and cultural competitors.
- To this end, Ipsos MORI conducted an online survey across all 19 countries of the G20, interviewing 18-34 year olds with a minimum of secondary education.
- This is **the second wave** of this research. The first wave was conducted before the British public voted in a referendum, on 23 June 2016, on whether or not to remain a member of the EU. The study is being repeated in this second wave to assess whether views of the UK have changed in the wake of the British public voting to leave the EU.
- This report provides a comparison between the research findings of the first and second wave of the study. Differences in the data can appear due to random variations in the sample that we draw. However, a significance test gives an indication of the strength of the difference we have seen in this data, relative to the natural variation we would expect when working with samples of this size. Due to the large base sizes reported, only a small change in the data is needed for results to show as significantly different. In some cases, figures that appear to be the same will show as significantly different, this is due to rounding. Statistically significant data shifts are clearly indicated with an arrow showing the direction of the data movement.
- In each market, the data is weighted to be representative of the national population by age (18-24 vs. 25-34) and gender. Additionally, the sample of the second wave is weighted to match the sample profile of the first wave on the following variables: interlocking age and gender quotas, education (secondary and tertiary education), area of residence (urban, semi-urban and rural), and employment status (studying, employed or other/neither). The aim of this weighting is to minimise a possible sample bias and to allow for greater comparability.
- Fieldwork in the first wave of this research across countries took place between 23rd May - 16th June 2016 with a final sample size of 20,594. The second wave of the study took place between 8th September - 16th October 2016, with a final sample size of 19,010. Participants who took part in the first wave were not eligible to take part in the second wave of the research, with the exception of 8 in the UK, who were included to ensure sufficient participant numbers from Wales & Northern Ireland.
- Technical note: where results do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of "Don't know" categories.

THIS WORK WAS CARRIED OUT IN ACCORDANCE WITH THE REQUIREMENTS OF THE INTERNATIONAL QUALITY STANDARD FOR MARKET RESEARCH, ISO 20252:2012

BREXIT HAS A NET NEGATIVE IMPACT ON UK ATTRACTIVENESS IN EU COUNTRIES BUT MORE POSITIVE IMPACT GLOBALLY

% of respondents

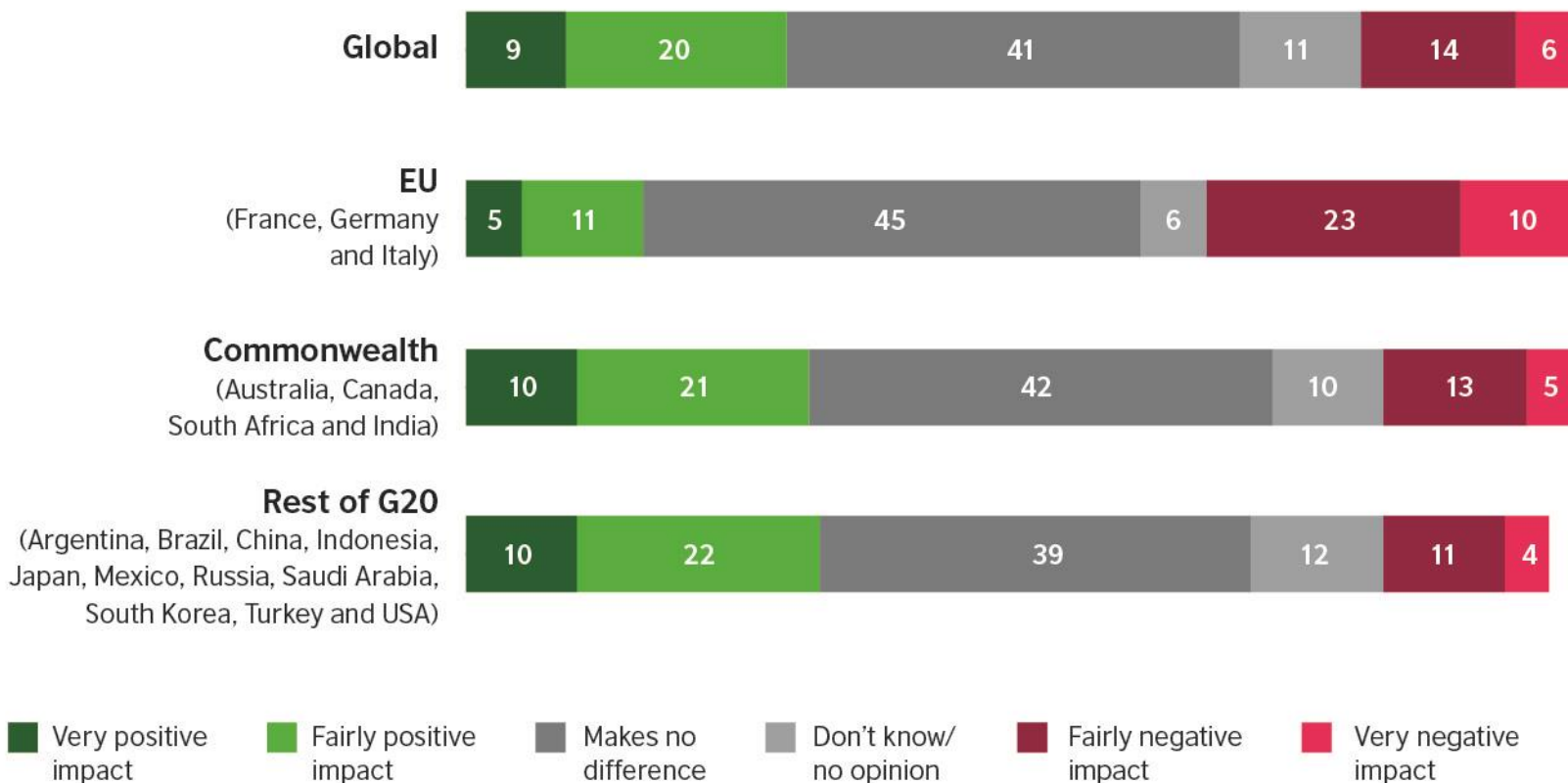


Overall, does the UK's vote to leave the European Union ('Brexit') have a positive impact, negative impact, or no impact on: Your perception of the attractiveness of the UK overall?

Source: As Others See Us 2 2016; Fieldwork by Ipsos MORI, Analysis by In2Impact. Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), Rest of World (11,010); Fieldwork dates: 8th September - 16th October 2016. Data presented here is weighted to relevant national populations;

BREXIT HAS A NET NEGATIVE IMPACT ON EU COUNTRIES' TRUST IN UK PEOPLE BUT MORE POSITIVE IMPACT GLOBALLY

% of respondents

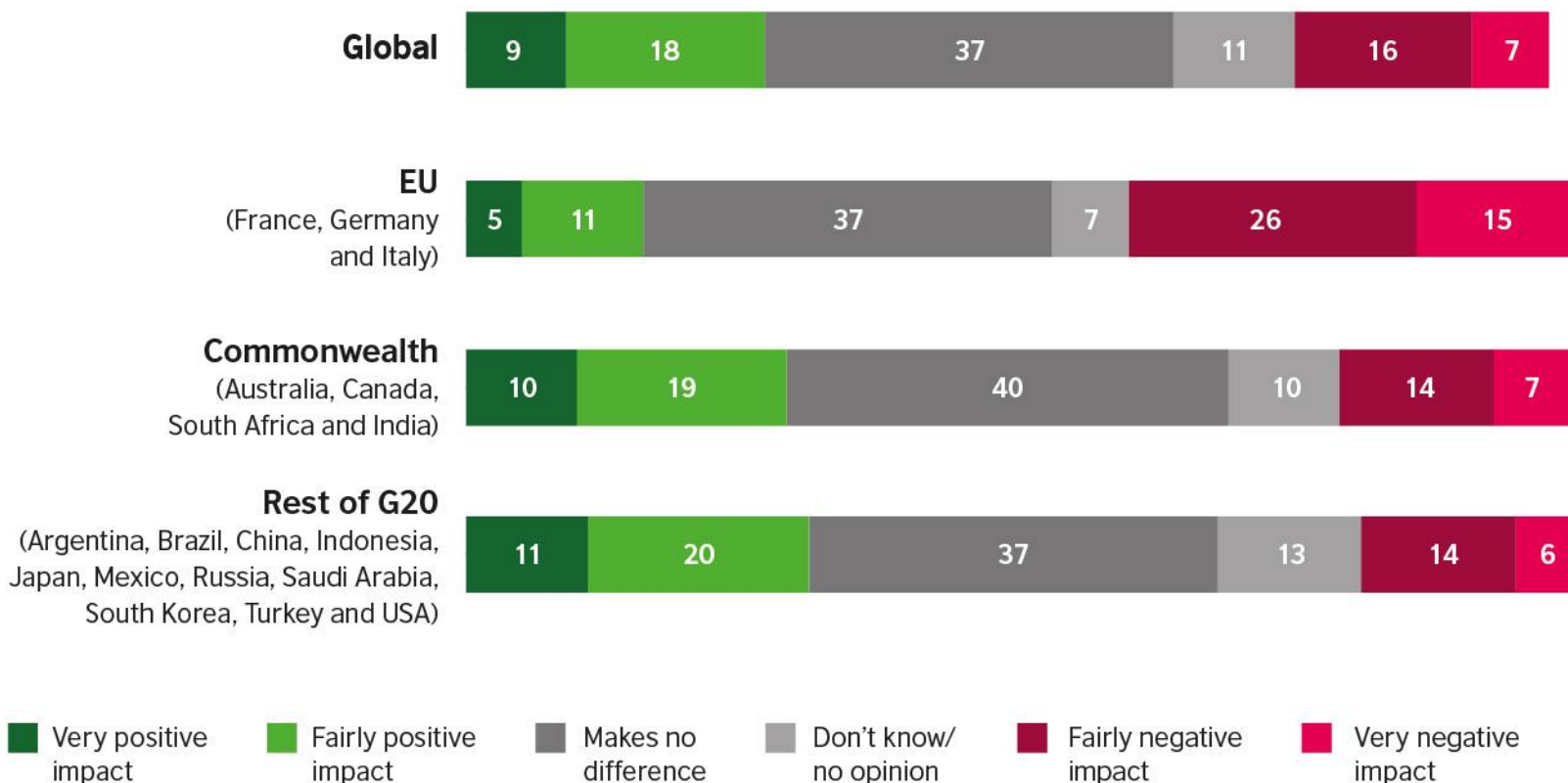


Overall, does the UK's vote to leave the European Union ('Brexit') have a positive impact, negative impact, or no impact on: Your trust in the people from the UK

Source: As Others See Us 2 2016; Fieldwork by Ipsos MORI, Analysis by In2Impact.
Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998),
Rest of World (11,010); Fieldwork dates: 8th September - 16th October 2016
Data presented here is weighted to relevant national populations

BREXIT HAS A NET NEGATIVE IMPACT ON EU COUNTRIES' TRUST IN UK GOVERNMENT BUT MORE POSITIVE IMPACT GLOBALLY

% of respondents



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

Source: As Others See Us 2 2016; Fieldwork by Ipsos MORI, Analysis by In2Impact. Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), Rest of World (11,010); Fieldwork dates: 8th September - 16th October 2016

Data presented here is weighted to relevant national populations

MODEST INCREASES IN PERCEPTIONS OF GLOBAL POWER AND A DECLINE IN OPENNESS

% Agree



Wave 1

Wave 2

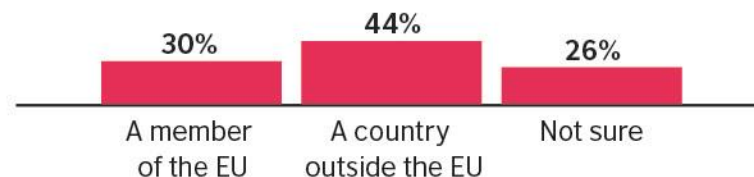
Arrows indicate a statistically significant increase or decrease

Base: All participants (19010), 8th September - 16th October 2016; Wave 1 - All participants (20594), 23rd May - 16th June 2016

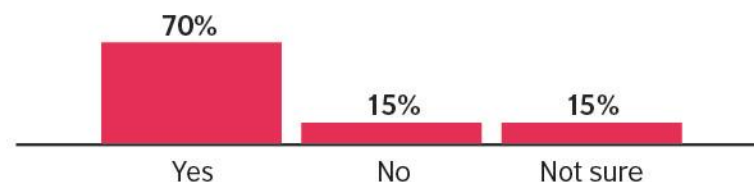
Thinking specifically about the UK, to what extent do you agree or disagree with the following statements?

HIGH AWARENESS OF REFERENDUM, BUT TWO IN FIVE WRONGLY SAY UK IS OUTSIDE EU ALREADY

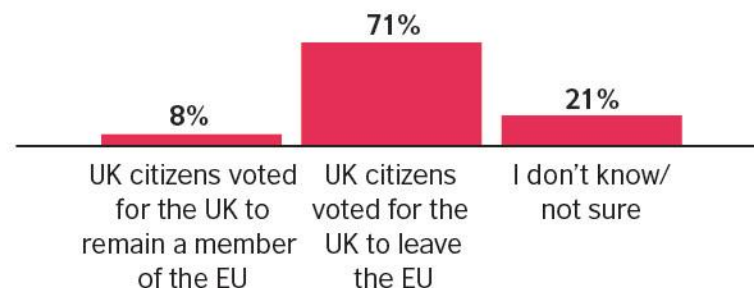
Which of the following is the current status of the United Kingdom (UK)?



In June 2016, UK citizens voted in a referendum on whether the UK should remain a member of or leave the EU. Are you aware that this referendum took place in the UK?

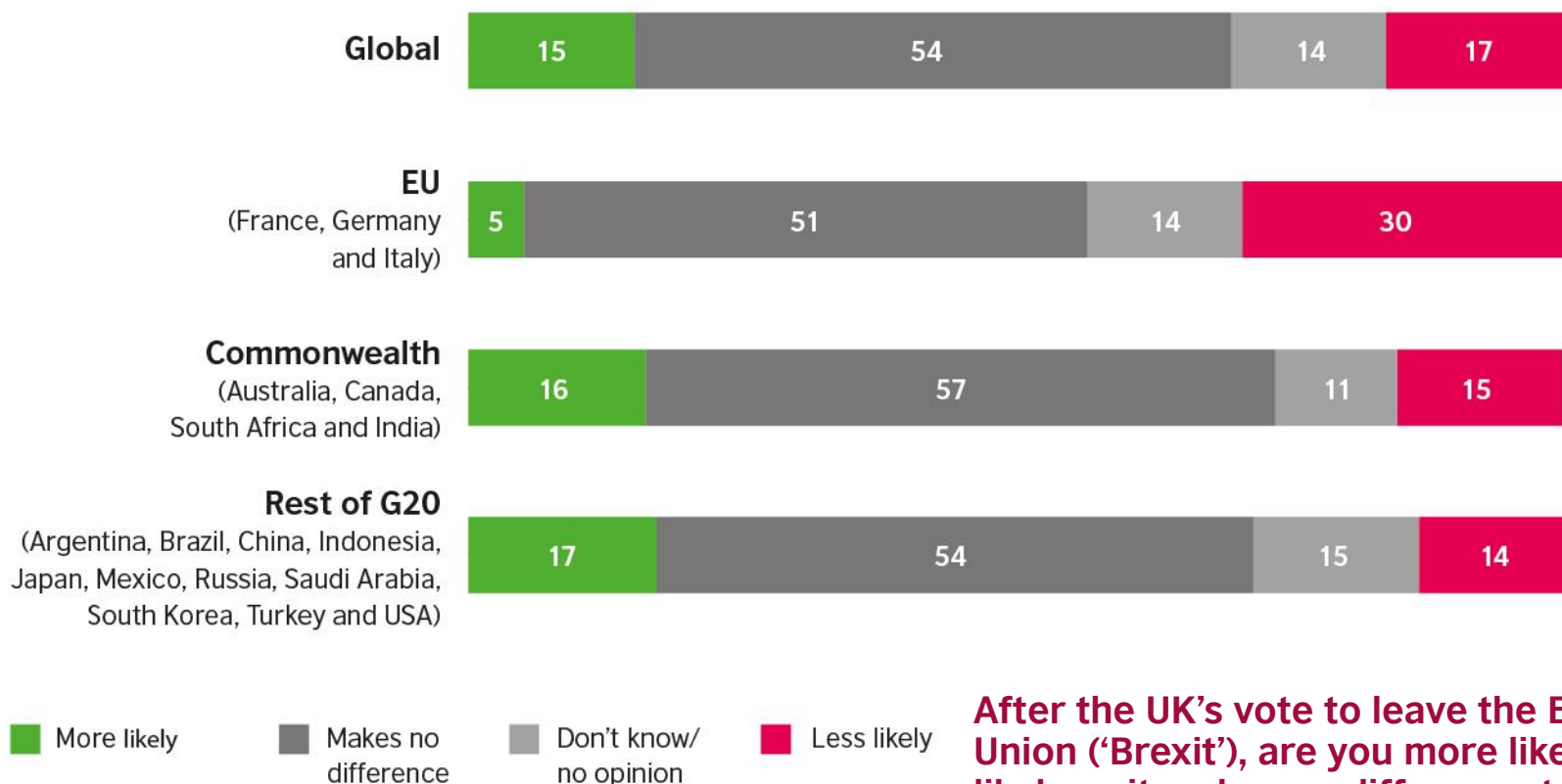


Do you know what the outcome of this referendum was?



BREXIT HAS A NEGATIVE IMPACT IN EU ON LIKELIHOOD OF STUDYING IN THE UK

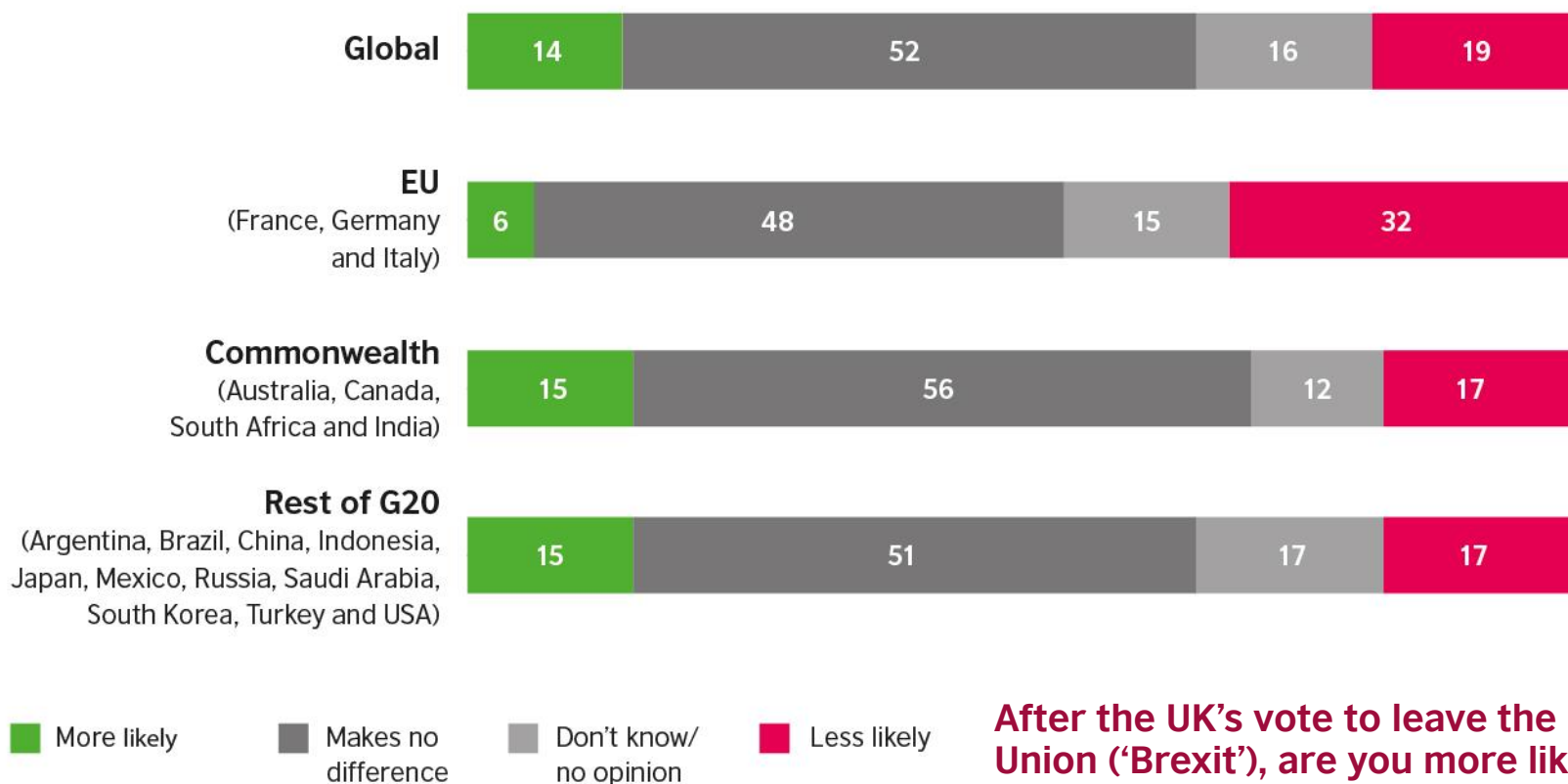
% of respondents



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

BREXIT HAS A NEGATIVE IMPACT ON LIKELIHOOD OF TRADE WITH THE UK

% of respondents

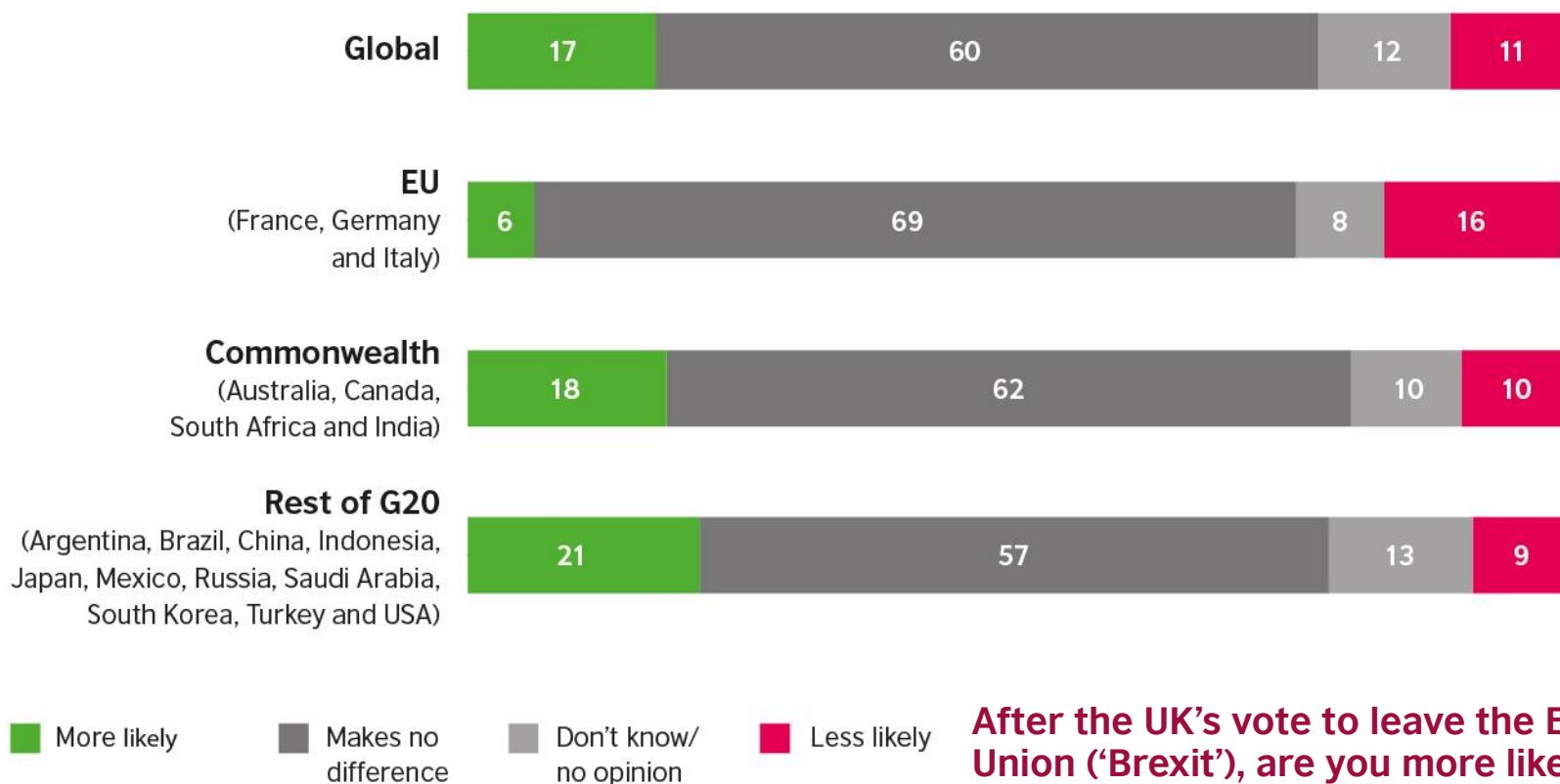


After the UK's vote to leave the European Union ('Brexit'), are you more likely, less likely or it makes no difference to: do business/trade with the UK

Source: As Others See Us 2 2016; Fieldwork by Ipsos MORI, Analysis by In2Impact. Base: Global except UK participants (18,010), EU (3,002), Commonwealth (3,998), Rest of World (11,010); Fieldwork dates: 8th September - 16th October 2016. Data presented here is weighted to relevant national populations

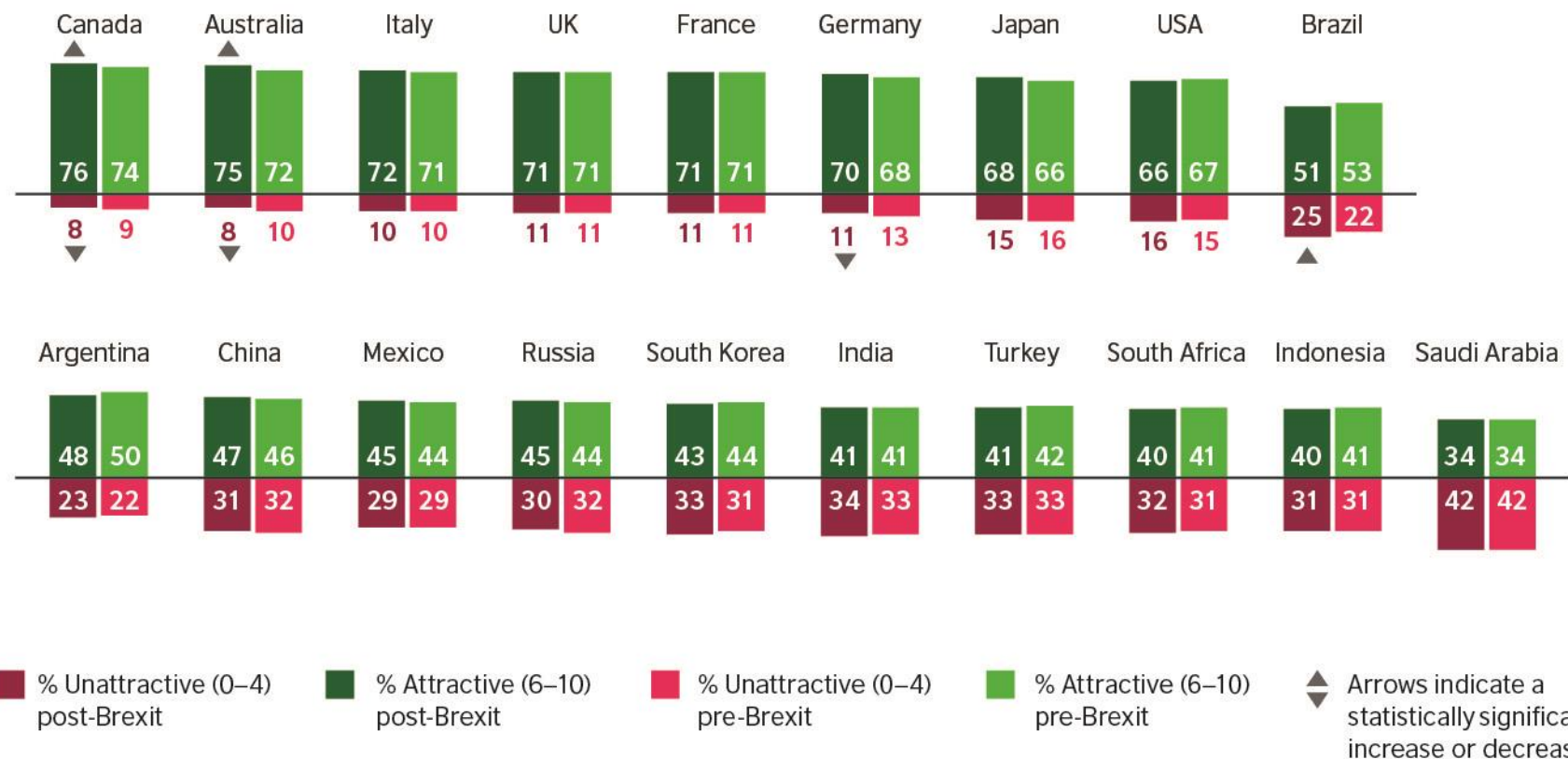
BREXIT HAS A POSITIVE IMPACT ON LIKELIHOOD OF ENGAGEMENT WITH UK ARTS AND CULTURE EXCEPT IN EU

% of respondents



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

NO CHANGE IN UK'S OVERALL ATTRACTIVENESS



And taking everything into consideration, how attractive overall do you find each of the countries below? (Note: On scale of 0-10, where 0 = very unattractive; and 10 = very attractive)

Base: All asked about each country (participants asked about UK and random selection of four other countries not including their own, UK participants asked about four random countries), Wave 1 fieldwork 23rd May - 16th June 2016; Wave 2 fieldwork 8th September - 16th October 2016.