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HOW THE BRITISH PUBLIC WANTS US TO NAVIGATE A MORE UNCERTAIN GLOBAL ECONOMY

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About the Fellowship

The Heywood Fellowship is a visiting fellowship created in memory of Jeremy, Lord Heywood, Cabinet Secretary from 2012 to 2018. The purpose is to give a UK Senior Civil Servant the opportunity to explore issues relating to public service and policy outside of the immediate responsibilities of government duties. The Heywood Foundation and the Blavatnik School, University of Oxford, established the Heywood Visiting Fellowship with support from the Cabinet Office. The Fellow is associated with Hertford College, Lord Heywood's former college.

The 2025-26 Heywood Fellowship set out to consider a refreshed UK strategy for navigating the changing Global Economic Order at this pivotal moment in time. It sought to explore the UK's long-term needs and objectives, identify current and future challenges, and propose innovative policy approaches which would enable the UK to navigate and flourish through this pivotal moment and into a new era.

Follow the Fellowship and its publications at www.bsg.ox.ac.uk/fellowship/heywood-fellowship

The Heywood Fellowship Team

Jenny Bates is the 2025-26 Heywood Fellow. She is supported by Martin Fitches, Catherine Taylor, Michael Leger and Mark Paskins.

Jenny Bates – Heywood Fellow. Jenny was Director General in the FCDO from 2020 to 2025, undertaking two roles focused on China and the Indo Pacific and then more recently on Economics, Climate and Global Issues. Jenny's career has spanned more than two decades of economic policymaking in the British government (in FCDO, BEIS and HM Treasury), working across the intersection of international and domestic economic issues.

Martin Fitches – Visiting Practitioner. Martin has an extensive international and trade background, most recently as Co-Director for US trade policy at the Department for Business and Trade leading the UK's response to US tariffs. Martin has held a range of senior trade policy roles since Brexit, including as Deputy Director of Multilateral Trade Policy and the WTO.

Catherine Taylor – Visiting Practitioner. Catherine is a UK diplomat with over two decades of experience spanning economic development, counter-terrorism, consular affairs, climate and environmental policy. Most recently, Catherine was leading the team responsible for the UK's relationship with the OECD in Paris.

Michael Leger – Policy Fellow. Michael is a PhD Candidate in International Political Economy at the University of Cambridge. His thesis is on the rise and fall of the Bretton Woods monetary order, and debates on the relationship between monetary sovereignty, monetary unions and development from the vantage point of the global periphery.

Mark Paskins –Visiting Practitioner. Senior Treasury official who, prior to joining the Heywood fellowship, was the UK's Alternate Director at the European Bank for Reconstruction and Development. He has spent much of his career working on international development, corporate taxation and financial services issues in EU and international fora, as well as working extensively with Multilateral Development Banks.

SUMMARY

KEY INSIGHTS FROM OUR RESEARCH:

In our Heywood Fellowship research, we undertook our own bespoke public deliberative exercise and drew on extensive opinion polling data to understand better what the British public thinks about how the UK can best navigate the changing global economic order.

Our main finding is that the British public is in a different place from policymakers when it comes to the UK's approach. Given global volatility, Britons want change: to strike a better balance between an open economy and one that is secure and resilient; and to place greater emphasis on what is in the UK's national interest.

Breakdown of findings:

1. **The public is interested in the UK's approach to the global economic order and wants frank and open communication with government.**

2. **Self-interest is the dominant lens through which the public views UK international economic activity, prioritising British economic interests over global connectedness and openness.** The public:

    - wants reduced dependence on foreign imports, investment and business ownership, considering that these create vulnerabilities, especially in relation to ownership of the UK's critical national infrastructure, such as transport, energy and water;

    - is more comfortable with openness and global interconnectedness in relation to non-essential goods and services, as well as global public goods such as research, but still expects tangible benefits for the UK;

    - wants reduced reliance on big economic blocs and is pragmatic about who the UK partners with internationally, so long as those partnerships benefit the UK;

    - is concerned about climate change but has deprioritised action in favour of security and economic concerns that it considers to be more immediate;

    - wants to help poorer countries but considers aid should benefit the UK first and foremost and is sceptical of its effectiveness; and

    - is hardening its attitudes towards migration with only a third believing it is good for Britain's economy.

3. **Britons feel increasingly unsafe in the world and consider the current approach to UK economic security to be too passive and reactive. They want the UK to be more assertive, forward-looking and better prepared for shocks and coercion.** However, while people are aware of growing global threats and willing to pay higher prices for goods and services that are safer and more secure, there is no consensus on trade-offs, such as cuts to public services or increased taxation, to fund enhanced national resilience.

4. **Views on the UK's international partners are changing, and the public wants greater diversification.** The public recognises the UK's current reliance on larger economic blocs for trade and believes a broader range of relationships would reduce risk. Trust in the US has fallen dramatically; distrust of China is decreasing; and support for the EU has increased, even among former 'leave' voters. However, support for the EU is fragile – driven more by concern about US behaviour than attraction to the EU and evaporates once trade-offs are raised. Young Britons in particular are more sceptical and less trustful of the UK's traditional allies.

5. **The public believes a pragmatic response would be needed to coercion by another state, ideally collaborating with allies.** The UK would need to respond to economic coercion, but in a measured and pragmatic way that avoided unnecessary costs to British consumers. Recognising the UK's limited ability to act alone, the public favours a coordinated response with allies.

6. **Britons have strongly divergent opinions, in particular by age and political affiliation.** The way people receive news and information is likely intensifying this divergence.

The case for deeper public engagement

Many governments today, including the UK's, are facing a long list of challenges: from weak economic growth and pressure on public finances to societal division, geopolitical instability and threats to national security. For a government to remain in power to deliver its agenda successfully, it needs not only sound policies but public understanding and consent for its agenda, including for the difficult decisions and trade-offs that are likely to be necessary in a constrained fiscal environment. To achieve this, regular and meaningful engagement with the public becomes an essential part of policymaking.

As policymakers operating in a democracy, the main route we have to understanding what the UK public thinks about any issue is through the electoral process. Political parties publish manifestos setting out their intended actions, voters consider those policies and then elect the people they wish to govern on their behalf. However, elections are infrequent and upholding democratic systems requires consistent attention. This is especially the case currently with democracy under pressure globally, as authoritarian movements gain ground. In Britain, polling points to declining trust in institutions, with growing scepticism about both the effectiveness of government and its ability to deliver on its fundamental responsibilities.

These trends are accompanied by evidence of rising populism and nationalism, driven in part by public economic anxiety and insecurity. In our earlier publications for the Heywood Fellowship, we highlighted concerns about the consequences of globalisation, including rising inequality, insecure employment and pessimism about the prospects for future generations. Such concerns are contributing to significant shifts in political debate both in the UK and internationally.

Added to this is an increasingly pronounced generational divide, both in attitudes and in patterns of news and information consumption. Recent polling suggests that this divide is widening with fragmentation of the media landscape exacerbating the situation.

It is in this context that the message from the British Foreign Policy Group (BFPG), in reporting the findings of this year's annual survey on UK public opinion on foreign policy, is both significant and timely, and one with which we would agree:

> ***"For policymakers, then, there is an urgent need for a far bolder and franker conversation about the challenges and trade-offs that lie ahead. A conversation that goes far beyond the walls of Westminster, meeting people where they are, and focusing firmly on building public consent across generations."*** [1]

[1] UK Public Opinion on Foreign Policy and Global Affairs British Foreign Policy Group Annual Survey - 2026

Understanding UK public views on the changing global economic order

Before delving into the detail of the opinions captured, it is worth reflecting first on the domestic UK context. We have drawn here on research on UK public opinion and social trends by the National Centre for Social Research[2], the Office for National Statistics[3] , the British Foreign Policy Group and the OECD. In particular, we believe policymakers would need to factor in the following before pursuing any international economic initiatives, which would impact on and/or require public support:

The lived experience for many of the UK public is one of increasing financial strain.

Economic concerns are the most immediate and dominant issue for the UK public, shaping their priorities and their judgment of government performance. The cost of living is cited as the most commonly reported concern (88%, ONS). Nearly three-quarters (73%) now believe there is "quite a lot" of poverty in Britain, the highest proportion recorded in almost four decades and only a quarter consider there to be “very little” – a record low (NatCen). UK respondents to the OECD Risks That Matter Survey[4] were more likely than those in most other countries to report that their household finances had deteriorated: as many as 50% reported that their finances were either “worse” or “much worse” than 12 months previously, compared to an average of just over 40% across OECD countries.

Public trust in institutions is low and there is widespread dissatisfaction with public services.

A record 45% of Britons noted in 2024 that they "almost never" trust governments of any party to put the nation's interests first, an increase from 34% in 2019. And 79% considered that the system of governing Britain needed "a lot of improvement”. And, despite record levels of taxation and spending on public services, the public's perception is one of severe decline, particularly in health and social care, where dissatisfaction with the NHS has doubled since 2019 (NatCen).

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[2] National Centre for Social Research - British Social Attitudes survey - the impact of the 2019-2024 Parliament on public opinion. June 2024
[3] ONS Public Opinions and Social Trends September 2025 and June 2026
[4] OECD (2025), Attitudes Towards Social Risks and Social Protection in the United Kingdom: Insights from the OECD Risks that Matter Survey, OECD Publishing, Paris

METHOD ONE: OPINION POLLING

We have drawn the following headline findings from the data we have collated and analysed. Annex B contains the detailed data and sources behind each of these conclusions:

Britons view foreign policy and international trade through the lens of UK national interest and consider the global economy to be both a threat and an opportunity.

Britons are in favour of free trade, though belief in the benefits is falling amid trade volatility. Britons are sceptical the UK can cut a good deal with bigger or non-aligned trading partners.

Britons feel increasingly unsafe in the world and believe UK economic resilience is insufficient. However, public awareness of major risks is limited, including in relation to the economy and global dependencies. There is an acknowledgement of growing global threats but no consensus on trade-offs, such as cuts to public services or increased taxation, to fund enhanced resilience.

Attitudes towards the EU are more favourable. Just over half of Britons think Brexit was a mistake and just under half believe the EU should be the UK's top priority relationship. But support for the EU is relatively fragile – driven more by concern about US behaviour than by attraction to the EU itself, with support evaporating once trade-offs are raised.

Distrust of China is higher than for other partners (US, EU) but decreasing (especially amongst the young).

Immigration is increasingly seen as an issue of concern. Only a minority believe migration is good for Britain's economy.

Britons have a strong interest in UK foreign policy though the past year has seen a fall in engagement (particularly amongst younger Britons) as Britons feel increasingly overwhelmed by global events. Views on the government's performance are mixed.

Trust in the US and the special relationship has fallen dramatically.

Britons remain concerned about climate change though global volatility and domestic economic challenges have led to the deprioritisation of climate action. The majority support the UK's Net Zero by 2050 target and support for renewables remains high. The majority do not see the UK as a leader of climate action globally.

Britons are divided on spending on development aid. Numbers in favour and against spend on aid are broadly even. However, even amongst those in favour there is a belief that most aid is wasted and only a very small minority support a return to spending 0.7% of GNI. A majority believe aid should support UK interests first and foremost.

How public attitudes have changed over time

We were keen to understand the extent to which the opinions of the British public, gathered through polling, have changed over time. Data from 2010-2012 reveals that, despite changes in the context, Britons have remained broadly consistent in their fundamental views:

1 National self-interest has been consistently the dominant lens through which the public views foreign policy.

As with now, the public in 2010-2012 viewed foreign policy through a self-interested lens. **'Protecting the UK at its borders including counter-terrorism'** was considered to be the **top foreign policy priority** with 'securing the supply of vital resources' in second place, followed by 'promoting British business and trade overseas'. (Chatham House – You Gov[5]).

2 Britons have continued to be pragmatic, rather than values-driven, about the UK's international relationships.

(a) Among nine institutions assessed in 2011 in terms of positive public perceptions, Britons ranked the EU in bottom place and **64% believed the UK spent too much on its EU contributions.** However, when asked whether the UK should work closely with the EU in particular policy areas, the results in favour exceeded those against by a wide margin. And all respondents, including prospective Conservative voters, supported a **close working relationship with the EU**, especially on counter-terrorism and illegal migration (Chatham House – You Gov).

(b) Similarly, while **only 4% of the British public in 2011 viewed China favourably**, given China's status as a rising economic power, it topped the list of non-European countries with which the public wanted closer diplomatic relations, with **34% supporting stronger ties**, 39% wanting them to remain the same and only 10% favouring weaker links (Chatham House – You Gov).

3 Global threats are always high in the public's list of concerns but the specific threats change over time.

While the global threat picture has shifted, Britons have remained acutely conscious of the threats posed to the UK from outside forces. Whereas today the UK public considers the top three security challenges facing the UK to be **continued Russian aggression, irregular migration and terrorism**, only the latter featured in 2011, when the top three threats were listed as 'instability in the financial system' 'international terrorism' and 'interruptions to energy supplies' (Chatham House – You Gov).

[5] The Chatham House – YouGov Survey – British Attitudes Towards the UK's International Priorities - 2011

4 Concern about climate change was lower than today but still quite widespread.

In 2010, **43% of Britons considered climate change to be dangerous to the environment**, a fall of 7% from a decade earlier. The decade had seen Britain experience various incidents of destructive flooding plus well-publicised international catastrophes, such as Hurricane Katrina. However, a 'climategate' scandal, shortly before in 2009, in which researchers were accused of manipulating data to strengthen the case for action on climate change, may have shaken public trust in the science. Lower levels of concern might also have resulted from the successful eradication of widely publicised pollution threats, such as **leaded petrol and use of pesticides in farming** (NatCen Social Research[6]).

5 Britons have remained concerned about poverty in developing countries but increasingly sceptical about the effectiveness of development aid.

Support for spending on development aid was trending downwards in 2010 reflecting growing scepticism amongst a public grappling with the effects of austerity. While **73% reported being at least "fairly concerned" about poverty in developing countries**, in 2010 only 35% agreed that the government should do more. In 2010 40% agreed the government should increase spending on overseas aid (down from 55% in September 2007) (DfID[7]). Other surveys suggest greater scepticism. The Chatham House-You Gov survey found that **57% believed development assistance should be radically reduced** because it was perceived as wasteful and did little to promote British interests, with the same percentage believing that "too much" was spent on aid.

METHOD TWO: PUBLIC DELIBERATION

While polling data provides useful information about how the public views the UK's place in the world and the impact of changes in the global economic order, it has its limitations. Polling offers a snapshot of people's opinions through their immediate reactions to a question. But it does not explain the reasoning that sits behind those views, which is why we turned to a second source - a technique known as public deliberation.

Public deliberation brings together a diverse group of citizens – often in what is known as a citizens' assembly - to engage deeply with complex issues, consider evidence, hear a range of perspectives and reflect before reaching conclusions. Participants are randomly selected to be representative of the broader population. Unlike traditional polling, deliberation reveals the values, trade-offs and reasoning that shape public preferences once participants are given time, information and space to think.

[6] National Centre for Social Research - British Social Attitudes 28 – 2011-2012 Edition
[7] Department for International Development - Public Attitudes Towards Development – Spring 2010

Deliberative approaches have been credited with generating more informed and nuanced insights than polling alone: reducing perceptions of elite bias (enabling more diverse and often unheard groups to be involved in shaping policy); revealing what people really care about once they understand the context; reducing polarisation and creating constructive dialogue between people who may not otherwise interact; and encouraging longer-term thinking.

Although many citizens' assemblies are initiated by civil society organisations, an increasing number are being commissioned by public authorities at the municipal, regional, national and supranational levels. Notable examples, on related topics to ours, include Climate Assembly UK, which was commissioned by six House of Commons Select Committees to explore public preferences around how the UK should address climate change, and a series of citizens' juries on UK trade policy conducted by the government-funded Centre for Inclusive Trade Policy.

The Heywood Deliberative Workshop – challenging the UK's traditional economic posture

We held a two-day workshop with the support of two delivery partners: the Involve Foundation and the Sortition Foundation. The latter recruited 26 participants, who represented a microcosm of the UK population across gender, age, ethnicity, disability, education, political persuasion and geographic location.

Annex A contains the full report of the workshop, compiled and written by the Involve Foundation. The report covers the format of the workshop, the issues and questions deliberated and conclusions reached by participants.

An overall conclusion that emerged was a disconnect between the UK's traditional 'big bets' on the global economy and how the UK public now views our place in the world. In our January publication[8], we described the UK's traditional international economic posture as that of an 'activist globaliser': we support the US-led economic order and have promoted more globalisation of markets and backed rules-based systems; we have made implicit 'big bets' that other states will want to join this globalising system and that global openness is a positive and enduring trend.

The overall message coming from the deliberation was that the British public is in a different place to policymakers in relation to the UK's approach to the Global Economic Order. Given global volatility, Britons want change: to strike a better balance between an open economy and one which is secure and resilient; and to place greater emphasis on what is in the UK's national interest.

[8] The Heywood Fellowship: The Changing Global Economic Order

1 An overarching desire for stability through change.

A strong underlying theme was a desire for greater stability through change. Participants linked this to diversifying trading relationships, improving resilience in decision-making, increasing public involvement in policy discussions and recognising that people value more than simply lower prices. There was broad consensus that any changes should aim to increase domestic control, stability, safety and security. As one participant reflected:

> *"Whatever opinion people had on how to achieve a stable economy, safety and security were important."*

There was also a clear expectation that any shift would have to be handled carefully and with sensitivity to context. As one participant noted:

> *“The UK model of globalisation in its economy has become its weakness” but the Government needs to be “pragmatic in [taking] destiny into its own hands.”*

2 Self-interest is the dominant lens through which the public views UK international economic activity, prioritising British economic interests over global connectedness and openness.

Participants wanted less dependence on foreign imports, investment and business ownership arguing that the current level of dependence created vulnerabilities. National preference was particularly strong in relation to ownership of critical national infrastructure such as transport, energy and water. Participants were careful to clarify that this was not sought due to any attachment to state ownership in itself, but rather because people felt the status quo of foreign investment was unstable.

Participants felt that a counter argument - that international trade builds trust between trading partners – did not hold in the current climate of trade disputes. One participant noted that:

> *"The idea of several states controlling all the key infrastructure in the UK is a ticking time bomb."*

By contrast, participants were generally more comfortable with openness and global interconnectedness in relation to non-essential goods and services, as well as global public goods such as research. However, even in the latter, support was often framed through a national-interest lens, with participants expressing a desire for the UK to realise tangible benefit from UK funding.

3 Britons feel increasingly unsafe in the world and consider the current approach to UK economic security to be too passive and reactive. They want the UK to be more assertive, forward-looking and better prepared for shocks and coercion.

Participants expressed a desire for the UK to be more forward-looking and more willing to challenge existing orthodoxies in global economic relations. Participants characterised the current approach as “slow to react, passive, [and] risk averse” and called for greater “strength” in responding to global challenges and opportunities.

This call for greater proactivity was closely linked to concerns about resilience and stability. Participants emphasised UK vulnerability to trade shocks and coercion and called for better preparation particularly given rapid technological change and uncertainty in global trade. As one participant observed, in a world where "decisions will have to be made much more quickly", the UK needs more "contingency plans" and "flexibility". Participants also wanted better communication from government and to be informed about necessary trade-offs.

Participants also expressed support for measures that could increase domestic control and reduce reliance on imports, even where these might involve costs. An overwhelming majority noted a willingness to pay higher prices for goods and services that were considered to be safer and more secure.

However, participants also considered that any state intervention in business, for the purposes of bolstering resilience, had to be balanced not forced, through, for example, tax break incentives (rather than restrictions) to encourage businesses to diversify their trade towards “safer” partners, balancing “regulation and [the] freedom to operate.”

4 Views on the UK's international partners are changing and the public wants greater diversification.

This pragmatism and desire for a proactive approach also extended to the UK's international trading relationships. There was recognition of the UK's reliance on larger economic blocs for trade but a desire to move towards a broader range of trading relationships due to the perceived risks of relying on larger blocs. Having a wider range of partners was viewed as "damage limitation" with one participant noting that "flexibility [in trade] isn't negotiable" as "staying static is dangerous".

5 A pragmatic response would be needed to coercion by another state, ideally collaborating with allies.

There was also a consistent view across the group that, while the UK would need to respond to any coercive action by a foreign state, it would need to do so in a nuanced, pragmatic fashion, rather than immediately responding in kind, as this could have a detrimental impact on UK consumers. Participants demonstrated humility about the UK's power to act alone expressing preference for a "union of reaction" between allies in response to states using coercion, and with one participant describing the UK as "a drop in the ocean".

6 Strong support for continued public engagement.

Participants also strongly supported continued public engagement on these issues and urged decision-makers to take the outcomes of the process seriously. One participant highlighted that the group had been "consistent in its message", despite "the diverse demographics of the group."

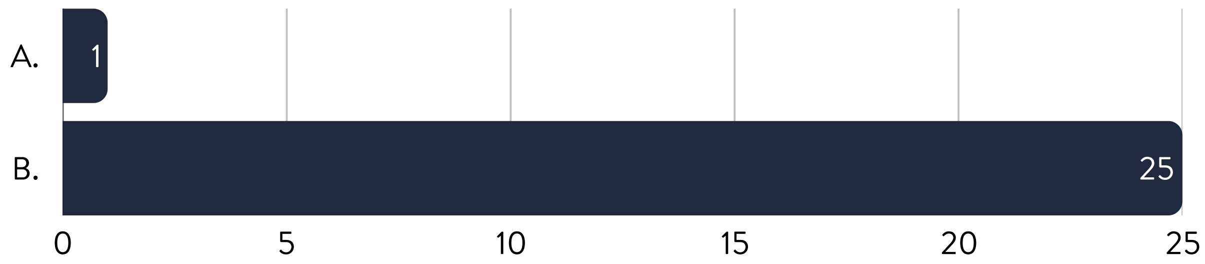
Voting results

In the closing session, participants were asked to vote individually on a series of position statements linked to the topics discussed throughout the workshop. While a binary choice inevitably simplifies participants' views and cannot capture the nuance evident in the deliberations and reflections outlined above, like polling it provides a useful indication of where participants' preferences lie when required to make a clear choice between alternative positions.

As can be seen from the results, participants clearly prioritised **security over efficiency, national preference over global connectedness, retaliation over cooperation and building stronger trading relationships with like-minded states over reliance on bigger markets.**

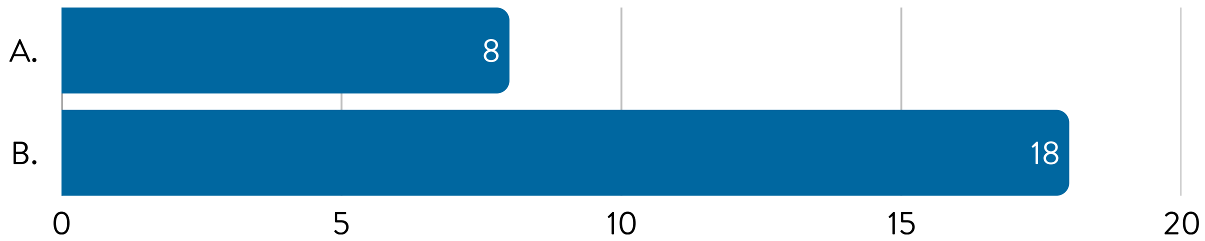
Security and efficiency:

A. The right approach is to ensure we get the cheapest goods and services available for as many people as possible, as that is the best way to help with the cost of living.
B. We should make sure goods and services are safe and secure and we are managing risks, even if it means higher prices.



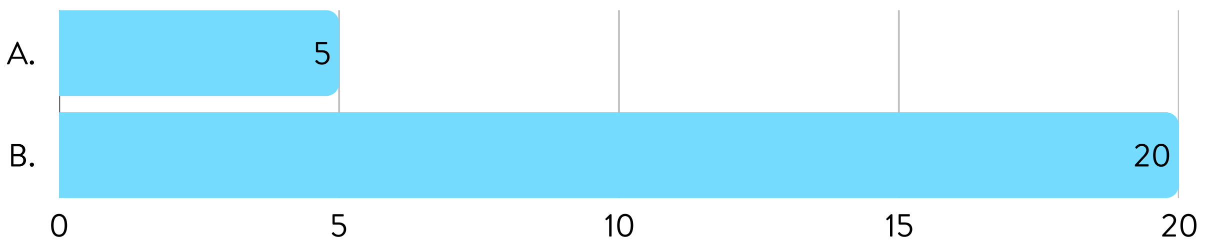
National preference and global connectedness:

A. The right approach is to treat things equally, wherever they are from, whether foreign or British (for example in relation to products, businesses, investment, or research).
B. The right approach is to support and prioritise British businesses, products, investment and research.



Economic statecraft:

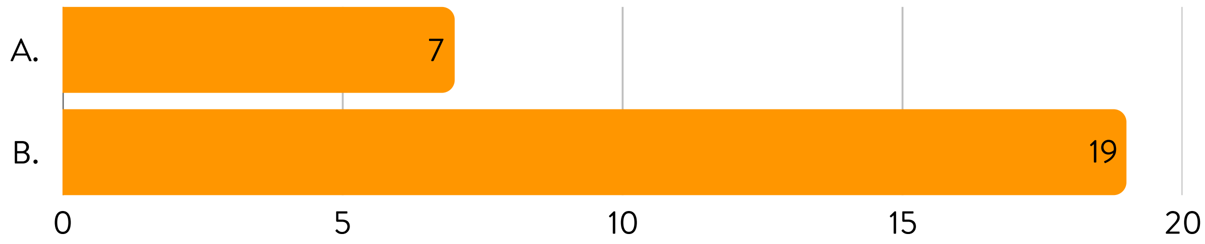
A. We should focus on cooperation with other countries and accept their different ways of doing things, rather than retaliating if they act against us.
B. We should be prepared to take action against other countries to defend and protect UK interests, even if it imposes some costs on us and increases the risk of further retaliation.



Economic partnerships:

A. We should prioritise trading with bigger markets where there are more opportunities, even if that means having to adopt their rules and approaches.

B. We should prioritise having more control and working with countries more like us in size and values.



Institutionalising public deliberation

As noted in the introduction, we believe that policymakers should be on the hunt for ways to engage the public in constructive dialogue to better understand views, build trust and strengthen the democratic process and reduce division and polarisation. Institutionalising public deliberation, which is already happening in many countries and at all levels of government, is one way to address this deficit. The OECD has set out a guide for policymakers, drawing on numerous examples across member countries and proposing eight possible models[9] . These range from having a permanent citizens' council with one-off citizens' panels (as is the case in Belgium) to the model of a legal requirement for public deliberation before certain types of decision are made (as is the case with the French law on bioethics).

Consistency with Heywood Fellowship framework and policy tramlines – lessons for policymakers

The views collated from polling and our deliberative workshop have helped inform our Heywood framework and proposed new policy tramlines. There is a clear sense that the UK public is more in favour of 'building secure openness' than 'activist globaliser'. The public wants a stronger focus on what is in the UK's national interest, with government more actively securing value to the UK from our international economic activities including through a more proactive approach to economic security and resilience as well as investment in multiple and diverse partnerships to reduce overreliance.

[9] Eight Ways to Institutionalise Deliberative Democracy – OECD Public Governance Policy Paper (2021)

We have reflected on what the results of the polling and our deliberative workshop mean for policymakers making choices about the future direction of UK international economic policy and offer the following **10 key takeaways:**

1. Despite the fall in figures this past year, **public interest in foreign policy remains high at 71% yet only 50% feel informed.** This leads us to conclude that there is public appetite for frank and open engagement with the government on handling international affairs, including our international economic posture.

2. Any policy initiatives, particularly those requiring public buy-in or short-term sacrifice, would be being introduced to a UK public that is deeply sceptical of and dissatisfied with government and is viewing all policy through a lens of hard-headed self-interest. Therefore, the case for any major initiative, from a new policy direction, new trade deal or further increase to defence spending, would need a **compelling and credible argument of benefit to the UK.**

3. Britons consider national security to be the UK's top foreign policy priority and believe the UK lacks economic resilience. **Making the link between economic and national security** should help the Government in its engagement with the public, including to secure support for bolstering resilience.

4. The evidence of falling trust in the US, coupled with a rise in the perceived importance of, and trust in, the EU, marks a significant shift and potentially provides government with a **public mandate for policies that strengthen the UK's relationship with the EU.** However, as support for the EU appears limited for trade-offs, the Government will need to work hard to articulate and sell to a sceptical public any necessary compromises from tough negotiations.

5. The public is pragmatic about the UK's international economic relationships and **favours diversification to reduce overreliance and build collective resilience.**

6

There is public support for **strengthening national defence and greater resilience to emergencies.** However, the disconnect between ambition and appetite for trade-offs indicates that support is again relatively superficial. Awareness of the risks facing the UK is also limited. More work may therefore be needed to raise awareness and prepare the public for potentially tough choices ahead.

7

Self-interest also shows up in the hardening of public attitudes on issues such as **immigration and development aid.** This may also indicate a public mood that is becoming less liberal on specific social issues. That said, there is a higher proportion in favour of spending more than 0.3% GNI on international aid (36%) than cutting it further (30%), suggesting some **appetite for a higher level of spending**, so long as spend would be in the UK's national interest or would alleviate immediate humanitarian concerns.

8

The UK public remains concerned about the impact of climate change and considers it important that the UK plays a leading role internationally in efforts to combat it.

9

Demographics play an important role in shaping opinion. The polling broadly focused on three characteristics – **age, political persuasion and socio-economic status.** This revealed significant divergence in perspectives, for example in relation to foreign policy priorities, security challenges facing the UK, climate change, the EU and development aid. Therefore, to secure support across these demographical divides, the challenge for any government will be to **develop policies that respond to widely differing viewpoints.**

10

Given the fracturing of the information and media ecosystem, **government will need to target its engagement and communication to reach different audiences through different means**, rather than relying on traditional media. Public engagement is essential to create an environment of trust and consensus. Deliberation is one way to achieve this.

Annex A

The UK Economy & Global Change - Summary Report

Author: Ciaran Cummins, The Involve Foundation

Introduction

This report summarises the key themes to emerge from a two-day deliberative workshop process carried out by the Heywood Fellowship team with support from Involve. The process brought together 26 participants from across the UK to deliberate the overarching question of whether the UK needs to change its approach to international trade and relations to achieve sustainable prosperity, in response to a changing global economic order.

Process

Deliberation is about giving people the time, information, and discursive conditions to engage deeply with a subject, weigh up different points of view, and come to a considered conclusion (if not also consensus) in response to the question(s) posed. In this process, participants were asked to explore the question of whether the UK needs to change its international approach to achieve more success. They were asked to consider this in the context of a 15-year time horizon, independent of which specific parties would be in government during that period.

Across the deliberation, subject specialists from the civil service and academia presented information to participants. At the start, this covered basic information about the state of the UK economy, the country's relationship to international trade, and some of the key forces reshaping international trade and relations: climate change, conflict, economic nationalism, and technological change. Across the remainder of the deliberation, information about four further topic areas was presented by specialists:

- Security and efficiency
- National preference versus global connectedness
- Economic statecraft
- Economic partnerships

Each presentation also provided tables with questions to respond to, designed to bring out the central tensions and trade-offs at the heart of relevant policy choices. After hearing from specialists, participants engaged in carefully facilitated, small-group discussions at tables in response to the questions posed. In addition to opportunities to ask questions to the specialists in plenary Q&As, participants were also able to bring the specialists to their tables during discussions to address further queries about the subjects.

At the close of the process, participants voted on a set of position options that corresponded to the four topic areas, before writing their final reflections on the overarching question as well as their broader takeaways.

During group deliberations, participant reflections were captured on flipcharts by facilitators, and in notebooks available to participants on their tables. In addition to these, one note-taker was available each day to record observations across groups at different points. These outputs have been analysed to draw out the key themes below[10]. These have been laid out in the order in which they were responded to by participants across the process. In some cases, groups merged discussion of different questions, and these have been reported together where that was the case. Participants' final votes, and themes from their final reflection notes, are detailed after this.

Recruitment

Participants were recruited through a process of stratified random selection (otherwise known as 'sortition'). They were recruited by the not-for-profit Sortition Foundation from a pool of people who had previously expressed an interest in taking part in a deliberative process. Of the 29 recruited, 26 took part. Participants were stratified by gender, age, ethnicity, disability, education level, party alignment, and geography to provide a reflective cross-section of the UK population.

Context

The broader context of current affairs did not feature heavily in table discussions, which is notable given how pertinent some international events were to the content of the deliberation. Nonetheless, there was some mention of these by participants, and it can be valuable for future interpretation to understand the backdrop of events at the time of the deliberation.

During the deliberation, the most high-profile, relevant event was the continued US/Israel conflict with Iran and the resulting blockage of the Strait of Hormuz. Media coverage drew attention to the knock-on effects this would have on global supply chains and prices, adding to more long-running attention on increases to the cost of living in the UK.

Although less high-profile, in the week prior to the deliberation there was continued press reporting on the revelation that United Kingdom Security Vetting had recommended against the appointment of the now former UK ambassador to the US, Peter Mandelson, to this post.

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[10] Analysis focused on flipchart contributions as these were the richest source of information, but emerging themes were compared against the wider data sources.

On longer timescales, the deliberation occurred in the weeks running up to local elections across England, Scotland, and Wales. In the months prior to the deliberation, there had been continued coverage of the long-term effects of President Trump's 2025 tariff impositions and related negotiations between the UK and US, as well coverage of a new UK-India free trade agreement, and former Prime Minister Starmer's state visit to China in January 2026.

1 Security and efficiency

The speaker introduced participants to two considerations that arise in making judgments about international trade policy: how efficiently goods and services can be sourced, and how safe and trustworthy particular goods and services are in a trade relation. Two examples were introduced to bring these notions to life: consumer electronic goods (e.g., smartphones and smart devices around the home) and just-in-time and stockpiled goods (e.g., Amazon warehouses, personal protective equipment, oil stockpiles). Pros and cons of prioritising efficiency and security, respectively, were then summarised, before the speaker shared the questions for the room to deliberate, provided below.

1a. **Should the UK focus on getting goods like mobile phones cheaply and quickly, or accept higher costs to make sure they are safer and more secure?**

As the first topic discussed, participants' responses exhibited more resistance to engaging with the trade-offs posed than would be the case in later discussions. However, there was some desire expressed for minimum quality standards to be upheld in imports ahead of reduced costs and greater convenience. People cited concerns over reduced safety from poorer quality goods, but also a desire in some cases to move towards a less "throwaway" consumer culture and more towards one in which people valued more durable goods.

Some suggested more specific options, such as banning certain goods outright if they do not meet UK standards, incentivising consumers through tax changes to consume differently, or running public information campaigns to encourage consumption of better quality goods. Furthermore, there was some recognition that a move towards stricter standards on imports could have knock-on effects, including concerns for the cost of living, potential supply shortages, and impacts on the UK jobs market. However, maintaining a floor for import standards was the recurring view.

1b. **Should UK consumers buy cheaper electronics from countries like China, or should we pay more for products from places considered to be safer?**

1c. Does it make a difference what the product is? Or how much it changes the price?

In general participants did favour cheaper goods but with an acceptable quality minimum that varied by product or service. One group gave the example of having less concern about the quality of stationary, for example, compared to daily essentials like food.

1d. Should UK companies be required to buy from lower risk countries (e.g., Japan, Australia, Europe) even if this raises their costs and might reduce jobs?

Here, participants generally expressed a desire for balanced intervention by the UK Government, wanting both “regulation and [the] freedom to operate.” Participants therefore discussed alternative proposals that they felt could meet this balance. These included introducing these requirements on companies gradually over time rather than all at once, and giving tax breaks to companies that buy from lower risk trade partners. Participants also wanted to see assessments of countries’ risk levels returned to over time, rather than being fixed in place.

1e. Should the UK create or increase stockpiles of things like fuel even if it means we pay more as consumers during normal times?

As a whole, people spent less time on this question. When they did, there was some preference for increasing stockpiling to boost the UK’s resilience to supply shocks. This was coupled with a desire to move towards greater self-sufficiency as a country. Participants hoped this could help keep costs down and make the country less vulnerable.

2 National preference and global connectedness

The speaker introduced participants to two ways that people often argue trade connects to achieving growth and peace. The first of these was national preference: the idea that supporting one’s own economy directly is the way to achieve these things. The second was global connectedness: the idea that prioritising international openness/trade and reducing barriers to markets is the way to achieve these. They then explained the ways in which the UK has leant towards the second of these approaches in recent decades, and the strengths and weaknesses of this. They then illustrated this in more detail through three policy areas: infrastructure, government procurement, and research funding. Pros and cons of national preference and global connectedness approaches were then summarised, before the speaker shared the questions for the room to deliberate.

2a. Should we prioritise global economic connectivity or national preference?

There was a consistent desire amongst participants for prioritising national preference: the idea that supporting one's own economy directly is the way to achieve growth and peace. This is in contrast to the idea of global connectedness which was likewise put to participants: the idea that prioritising international openness, international trade, and reducing barriers to markets is the way to achieve these ends. National preference was preferred particularly when it came to critical infrastructure such as transport, energy, and water. However, this was balanced with a desire for global economic connectivity when it came to non-essential consumer goods and services. In some cases though, there was disagreement or at least a shared sense of uncertainty over whether and to what extent certain categories of goods and services, such as technology, should be understood as critical infrastructure.

Much discussion here centred on the degree to which the UK is open to foreign direct investment in its companies. Although there was some openness, participants expressed a consistent desire for a minimum government stake to be required in UK businesses, and/or a maximum threshold for foreign ownership. Despite this, some also felt that this desire for the UK Government to preserve more domestic ownership was curtailed by previous decisions which had long set the UK on a path of privatisation and foreign investment. People's rationales for desiring more domestic ownership of UK companies was not always clear. However, material interests were cited more than any other. There was little connection made, for example, between UK ownership and British identity, pride, or sovereignty. Instead, people felt greater domestic ownership would have beneficial knock-on effects on people's lives. As one participant said, the "most important thing is things being made here/industries being invested in".

One table group in particular focused on weighing up the particular arguments for and against national preference and global connectedness that had been presented to them, which again brought out how nuanced people's support for national preference could be. For example, the notion that this would 'improve access to jobs' was supported. The potential expense to the public of a shift towards national preference mattered less in this table's discussions since people argued costs were already going up, and so the status quo of a more globally connected economy was not persuasive. From an international relations perspective, they also expressed doubts that global trade can improve trust between countries, given recent experience of international trade disputes.

2b. Should the UK government 'buy British' when it is sourcing supplies (arms, medicines, textbooks) or buy the best option even if it is produced abroad?

2c. Should the UK have requirements for British ownership of infrastructure (energy, transport etc) even if it means higher prices (for electricity and for train travel etc), or should the UK support ownership by foreign states or businesses if it would mean lower prices?

Here, participants generally preferred the UK government to 'buy British' but, again, in tandem with a desire for greater reduction of foreign direct investment in UK suppliers. People expressed support for more state ownership of suppliers, or at least greater oversight of and collaboration with UK businesses by the Government. While some were accepting of the greater expense that could come with domestic suppliers, others questioned that this would be the case if suppliers were also owned in part or fully by the state. Again, few gave reasons of national pride or identity as a justification for switching to more UK suppliers.

Despite a desire to focus more on UK suppliers, some expressed doubts this was possible given the extent to which they felt the world was globally connected. People were also frustrated that matters of supply were at the whims of changing governments, affecting the UK's long-term ability to support British suppliers and the knock-on effect on infrastructure.

2d. Should UK taxpayer-funded investment in science and research go to the best British scientists/researchers or to the best scientists/researchers wherever they are?

In contrast to above, this question elicited more inclination for maintaining a global connectedness approach, with participants opting for investing in the best researchers wherever they are. At the same time, this was tempered by a desire for the UK to still see a return on this investment, be that a financial gain or from the fruits of research itself. Some also suggested they would like the UK to invest in researchers from elsewhere while also encouraging them to choose to work in the UK. Participants put their diverging response to this question down in part to viewing research as something which should benefit all of humanity, and because, unlike other goods and services, they judged research is simply harder to "compartmentalise", as one participant described.

3 Economic statecraft

The speaker introduced participants to the concept of 'economic statecraft': the idea that states use their economic power to influence other countries. They then explained how this has increased in recent times, and why this matters to the UK given its own approach to international trade and relations. They next introduced some of the tools states use, such as preferential tariffs or investment screening, to have a positive or negative effect on other countries. To bring this to life, they then gave a recent example of economic statecraft used by China and Australia during the Covid-19 pandemic. They then explained briefly how economic statecraft can affect the UK economy, before summarising the pros and cons of economic statecraft. They then shared the questions for the room to deliberate, provided below.

3a. How should the UK respond if other countries use their economic power against us?

3b. Should UK consumers buy cheaper electronics from countries like China, or should we pay more for products from places considered to be safer?

There was a consistent view across the group that the UK should not respond with tariffs against an ally, with the main reason being that people were concerned about the resulting impact on UK consumers. Strategically, they felt having a blanket approach to responding to the use of economic power against the UK is wrong: it wasn't contextually sensitive and was seen as a blunt instrument. Instead, participants generally wanted to see more nuanced, pragmatic responses.

This meant that direct retaliation with tariffs could in some cases be sensible, but it shouldn't be the default and routes which instead emphasised international collaboration with (other) allies was preferred. As one participant suggested, they wanted to see a "union of reaction" between allies to states using tariffs. Beyond specific means, many participants also raised that they wanted the UK to be more 'proactive' in how it plans for and responds to these scenarios. As it stood, they felt the UK was merely reacting to international developments and generally felt we are too slow to respond to world events.

3c. If China stopped importing British products (like whisky or cars) during a political dispute, should the UK respond by restricting imports from China?

This question received mixed responses from participants. Some were against the UK responding in like fashion to China, preferring instead that we be less reactive and "wait it out", as one participant put it. Others supported responding with import restrictions, but as in previous discussion, this depended ultimately for them on context; for example, what exactly was being disputed and the degree to which British trade had been affected by China's restrictions on imports. A desire for a nuanced approach to economic statecraft was exemplified by one table group which suggested a variety of responses could be explored: tariffs, increasing trade with the EU in place of China and finding other ways to reduce dependency on China, or finding other ways to reduce import reliance in general.

3d. Should the UK government be able to force British companies to stop selling to certain countries (to enable the UK to influence the behaviour of that country), even if this costs jobs or profits?

Participants largely agreed the UK government should have this power over British companies, because of a concern about upholding wider values such as human rights standards. However, some agreed but wanted this to be balanced against consideration of the potential costs to the UK's reputation as an open trading partner. These participants wanted to temper slightly the powers the government employed. For example, they preferred if the government sought to incentivise, rather than restrict, companies to stop selling to certain countries. Others were unsure if a complete restriction would actually be effective as a means of influencing the other country's behaviour; therefore they did not want to rule out other mechanisms which could be more effective.

3e. Should the UK ever act alone in economic disputes, or only in coordination with allies?

This question elicited a mixture of responses from participants, but most were in favour of the UK coordinating with allies. This came from a desire to be attentive to the particular international relations at play in a given context, and because they felt the UK should have humility about its power to act alone. Many suggested the UK is not big enough in this regard; as one participant put it, the UK is these days "a drop in the ocean" when it comes to international affairs. These participants felt that by acting alone, we not only ignored context and overestimated our power, we could also be left more vulnerable as a result.

4 Economic partnerships

The speaker first introduced participants to the concept of economic partnerships and trading partners, before explaining which states and blocs account for the largest contributions to the global economy and how this has changed in recent decades. They detailed who the UK's top trading partners and investors are, and the key concepts for understanding how trade and investment negotiations work, and explained some of the measures people use to try and capture which countries are more alike in international trade and relations (e.g., trade disputes, UN voting records, official groups such as the G7). They then summarised the pros and cons of partnerships that favour either larger trading partners or smaller trading partners. They then shared the questions for the room to deliberate, provided below.

4a. Should the UK trade and invest mainly with big blocs like the US, EU and China or build lots of relationships with smaller partners?

This question generated mixed views across tables. Many were drawn towards building a diversity of relationships with smaller partners, as they judged this would help spread the potential risk that can come with working with fewer, albeit larger, partners. Others also argued it would create new trade opportunities, not just avoid potential risks. Others still were more forthright, suggesting the UK could be "the big partner" to smaller countries, just as we are to larger blocs currently.

For those who were more in favour of remaining with our current, larger trading bloc partners, they cited the security that comes with familiarity. While they recognised changes to how secure these partners are at present, they still felt that the shared trade standards between the UK and these blocs, along with our geographical proximity (in some cases), were valuable factors which still brought some security. Nonetheless, the overriding view in the room was that moving, at least long-term if not also in the short-term, towards a wider range of relationships was necessary because of the perceived risks of these larger blocs.

4b. Should the UK trade more with big markets (like the US or EU) which would give more scope for jobs and growth, even if that means following their rules and having less say?

The majority of participants responded to this question by being in favour of trading with larger markets, however, they felt it was still important for the UK to develop deals with smaller markets. This was not because they expressed a particular concern around having to follow others' rules; indeed, some stated comfort with the fact that the UK follows various international regulations on goods and services.

Rather, while they wanted to maintain the benefits to job creation and economic growth that came from these relationships, they were concerned about the stability of these larger markets and wanted to be able to pivot from them more easily. Similarly to above, participants felt that a wider range of trading partners functioned as "damage limitation", as one participant put it, in case any larger markets became unstable over time. Again, some also felt this move was strategically worthwhile since smaller but growing countries could become more valuable to UK trade. A minority of participants felt switching entirely to smaller markets was preferable, citing the same reason.

4c. Should we trade more with countries more similar to us in size or values, even if the gains are slower to achieve and smaller?

Somewhat in contradiction to the previous question, here most preferred that the UK trade with countries similar in size or values despite the slower gains this brought. Some explained this by focusing on the importance of shared values, while others, again, emphasised their long-term interest in the UK switching to a wider range of smaller partners. They interpreted trading with similar countries to still mean that a wide number of trading partners were available. Their hope was this greater number of partners could reduce overreliance on some larger partners and the vulnerability this can bring.

4d. Should we change our approach based on how countries, and our relationships with them, change over time? (For example, Japan was once an enemy but is now a close ally.)

The majority of participants agreed that the UK should, on a case-by-case basis, be open to changing its approach to other countries when it comes to trade. They had little interest in the idea that the UK should hold onto any "grudges", as one participant put it, against other countries and wanted to be open to those that they judged had "changed for the better". Moreover, people felt this position was a matter of necessity; as another participant put it, "flexibility [in trade] isn't negotiable" because "staying static is dangerous."

While no participants expressed strong disagreement with the above view, a small minority remained uncertain, since they felt making any predictions about how other countries might change over time was difficult. They felt they had come to this uncertainty because of the UK's present changing relationships with some countries. Some who were unsure leant partly towards sticking with just current relationships, though regrettably so. As one participant put it, with international trade it felt like a case of "better the devil you know."

5 Final principle votes – see section in main paper

6 Final reflections

This section reports the key themes to emerge from participants' final reflection notes in response to two questions posed.

1. **Do we need to change our international approach to achieve sustainable prosperity for the UK? And if so, how?**

A very small minority remained uncertain on this overriding question. In some cases this was because they felt unclear as to why change was potentially needed, however most who expressed uncertainty did so because they judged that changing international affairs called for a slower, developing response rather than a sharp, quick change. They expressed a desire to preserve what the UK had in terms of high standards around trade and felt a sudden change could undermine this. These participants also expressed humility about what the UK is able to change; as one participant put it, "we don't make much influence" on the world stage in the way that others feel we do.

However, **the vast majority of participants indicated that a change in approach is needed.** A recurring theme here was that the UK needed to be more 'proactive'. Many felt the UK was, as one participant summed it up, "slow to react, passive, [and] risk averse" in its approach to international trade and relations. Instead, they wanted the UK to show greater "strength" in our international approach. As noted earlier, this desire for being proactive was closely connected to material concerns: without greater resilience the UK would not be prepared for future trade shocks. People also felt that we needed to better anticipate what's on the horizon. Examples given included further fluctuations in the degree of global interconnectedness, as well the impacts of technological change on manufacturing. As one participant put it, if we are moving into a world in which "decisions will have to be made much more quickly", the UK needs to have more "contingency plans" and "flexibility" to allow it to move with the times.

People put their desire for the UK to be more proactively resilient down to a deeper yearning for stability - **albeit stability through change.** This was cashed out in various ways: greater variety of trading partners, changes in how decisions are made (including more engagement of the public in processes such as that they were participating in), and a recognition by decision-makers that the public have priorities other than getting cheaper goods and services. This yearning for stability via change was exemplified too by the many references participants made, again, to rebalancing the amount of foreign direct investment in UK infrastructure and businesses.

What was clear by this stage was **this was being sought not especially out of an attachment to state ownership in itself, but rather because people felt the status quo of foreign investment was unstable**, leaving British infrastructure and businesses susceptible to overseas shocks. As one participant put it, “the idea of several states controlling all the key infrastructure in the UK is a ticking time bomb.”

Finally, insofar as people also sought to reduce foreign imports at the same time, this was similarly argued on the basis that change may not be worse than the present. For example, those who were more accepting of the costs that could come with reduced imports explained that this concern was losing ground as the cost of living continued to rise regardless.

2. What messages do you want the team to take away from this weekend?

Participants wanted the Heywood team to take away an awareness that they were trying to balance a range of interconnected considerations in response to the question at hand. **They wanted the UK to be more proactive, challenging international trade and relations orthodoxies. At the same time, they wanted the UK Government to take a careful, context sensitive approach to how it did this.** As one participant summed it up: “The UK model of globalisation in its economy has become its weakness” but the Government needs to be “pragmatic in [taking] destiny into its own hands.”

Finally, **they wanted to achieve greater domestic control and stability from any change, and this was a uniting factor.** As one person suggested, “Whatever opinion people had on how to achieve a stable economy, safety and security were important [to all].” Participants expressed their interest in greater public engagement on this topic in related terms. They thought it was important for decision-makers to pay attention to the outcomes of this process, not least because, as one participant put it, they judged the room to be “consistent in its message” and this is important given “the diverse demographics of the group.”

7 Conclusions

The previous section summarises many of the key takeaways from this process and, importantly, in participants’ own words. Therefore, here we instead note an important consideration about interpreting their conclusions and suggestions for how these could be further understood.

Future engagement could, for example, allow participants more time to engage with trade-offs that remain between their conclusions across the topic areas (e.g., those seeking cheaper goods and a pivot to domestic manufacturing). It could also delve further into the qualitative understanding of participants' rationales for their preferences, particularly where there is greater consensus but for potentially different reasons (e.g., when it comes to increasing domestic ownership of UK businesses and infrastructure). Finally, enclave deliberation, in which a sample is largely heterogeneous but shares certain characteristics, could be used to explore the views of particular groups in more detail.

Annex B

Detailed Polling Data

1 **Britons have a strong interest in UK foreign policy priorities though the past year has seen a fall in engagement (particularly amongst younger Britons) as Britons feel overwhelmed by global events. Views on the government's performance are mixed. (BFPG)**

a. Interest in foreign policy reached an all-time high in 2025 (since polling on this began in 2020) at 83%, though fell back to 71% in 2026, with the proportion who feel informed about the UK's international activities dropping from 67% to 50%. The BFPG's annual survey also saw a growing number of 'don't know' responses which they interpreted as the UK public becoming 'increasingly unsure about how the UK should engage with a volatile world and increasingly sceptical of key pillars of the current world order'. Generational differences are particularly pronounced, with younger people more sceptical and less trustful of the UK's traditional allies (in particular the US but also the EU), far less likely to identify as patriots (25% of 18–25-year-olds, compared with 70% of over-66s) and less distrustful of the UK's potential foes.

b. The fracturing of the media and information system is compounding the challenge. As trust in traditional media declines, the way generations are gaining foreign policy insight, and their views are being shaped, also differs widely, with young people increasingly getting information from social media – a less reliable medium and a harder one for government to engage with.

c. Strengthening national security is the clear top priority (47%), ranking in the top three across all age groups and political affiliations. This is followed by limiting the economic consequences of the war in Iran (38%), strengthening the UK-EU relationship (38%), and tackling the root causes of irregular migration (36%). Lower priorities include reducing reliance on the US (22%), tackling climate change (21%) and supporting Ukraine (17%), while improving UK-US relations (14%) and helping resolve the Israel-Palestine conflict (13%) rank lowest. Beyond broad agreement on national security, priorities diverge significantly by age and political affiliation. Among 18–25-year-olds, the top priorities are strengthening the UK-EU relationship (37%), national security (32%) and climate change (29%). Conservative and Reform UK voters place greater emphasis on irregular migration and the economic impact of the war in Iran, while Labour, Liberal Democrat and Green voters prioritise strengthening relations with the EU.

d. The Government's performance on delivery of key foreign policy issues is considered to be mixed. While there is majority support for the UK's approach to resetting relations with the EU (54%), this has fallen 10 percentage points since 2025. More Britons support the Government's approach to the UK-US relationship (40%) than oppose (26%) but this has also fallen considerably over the past year. More Britons oppose than support the Government's handling of the three major ongoing global conflicts – Russia-Ukraine, Israel-Palestine and US-Iran.

2 Britons view foreign policy and international trade through the lens of UK national interest and consider the global economy to be both a threat and an opportunity.

a. The UK public views foreign policy and international trade primarily through the lens of domestic benefit. Support for economic cooperation is also highly conditional, shaped by a pragmatic desire to strengthen the UK economy and a clear preference for partners perceived as stable and reliable.

b. 92% of UK respondents viewed the global economy as a threat to national security. This was the highest among the eight European countries surveyed (UK in a Changing Europe[11]).

c. 69% of Britons think the economy will get worse. Net optimism scores are amongst the lowest since records began in 1978 (Ipsos[12]).

[11] British attitudes towards national security risks and cooperation – UK in a Changing Europe (May 2023)
[12] Economic Optimism Index – Ipsos (June 2026)

3 **Britons are in favour of free trade, though belief in the benefits is falling amid trade volatility. Britons are sceptical the UK can cut a good deal with bigger or non-aligned trading partners.**

a. 55% believe that free trade has a positive effect on the UK as a whole – down from 71% in 2025 (BFPG).

b. Views on trade and particular free trade agreements (FTAs) are strongly shaped by non-economic factors, in particular political persuasion, though economic pragmatism has increased since 2019 due to global uncertainty and supply chain disruption. Attitudes towards an FTA with the EU remain polarised from lingering Brexit sentiment (BJPIR[13]).

c. Public support is higher for FTAs with countries seen as democratic, culturally similar and economically stable (e.g. Australia, Canada, Japan) rather than autocracies (e.g. Russia, China). Scepticism arises when people believe bigger trade partners will dominate negotiations and not respect UK interests e.g. US, China (BJPIR).

4 **Britons feel increasingly unsafe in the world and believe UK economic resilience is insufficient. Public awareness of major risks is limited, including in relation to the economy and global dependencies. There is an acknowledgement of growing global threats but no consensus on trade-offs, such as cuts to public services or increased taxation, to fund enhanced resilience.**

a. Only 18% of Britons actively feel safe with insecurity at its highest since 2021. The top security challenges facing the UK are considered to be continued Russian aggression (36%), irregular migration (35%), terrorism (31%), cyber-attacks from other countries (30%), US withdrawal from global leadership (21%), the rise of AI (20%), domestic political instability (20%), the war in Iran (20%), climate change (16%) and the rise of China (13%). However, there is very little agreement across generations. While over-66s view continued Russian aggression (60%), cyber-attacks (44%) and irregular migration (40%) as the biggest security challenges facing the UK, none of these feature in the top three challenges for 18-25-year-olds, which are terrorism (26%), the rise of AI (26%) and domestic political instability (25%) (BFPG).

[13] Public attitudes towards international trade and trade relations - British Journal of Politics and International Relations (BJPIR) - 2024

b. 60% of the public supports increasing spending on defence to 3% of GDP (a fall of 11% since 2025). However, the public is unwilling to pay for enhanced security through cuts to domestic services (e.g. NHS, education or welfare) or increases in personal taxation (BFPG).

c. 34% of Britons believe the UK would be economically resilient – able to maintain food, energy and medical supplies - if a conflict emerged tomorrow, compared to 39% who believe it wouldn't be (BFPG).

d. Most individuals are not familiar with the range of threats identified in the UK's national risk register. Awareness of global dependencies (e.g., reliance on overseas suppliers for food, energy, and critical goods) is limited among the general public. Most respondents do not recognise supply chain disruption as a major risk compared to issues like cost of living or health emergencies (National Risk Register 2023[14]).

5 **Attitudes towards the EU are more favourable. Just over half of Britons think Brexit was a mistake and just under half believe the EU should be the UK's top priority relationship. But support for the EU is relatively fragile – driven more by concern about US behaviour than by attraction to the EU itself, with support evaporating once trade-offs are raised.**

a. 24% of Britons view the EU as the UK's closest ally (2nd to the US on 27%), up from 17% in 2024 but down from 29% in 2025. 51% identify as European, up from 44% in 2019 but down from 2025's high of 55%, when there was greater enthusiasm for the UK-EU reset, and with differences according to political persuasion as the Brexit divide remains apparent (BFPG).

b. 49% of Britons believe the EU should be the UK's top priority relationship, well ahead of the US (20%) and other mid-sized countries (10%). Across every demographic polled, the EU is cited as the relationship the UK should most prioritise (BFPG).

c. Support is high for cooperation with the EU across a broad set of areas, including defence and security (78%), tackling irregular migration (76%), reducing barriers to trade (70%) and joint research collaboration (69%). Figures remain high even amongst leave voters.

[14] National Risk Register - 2023

d. But support is fragile and reduces markedly when trade-offs are introduced. E.g. 70% support cooperation on reducing barriers to trade but support falls if the trade-off were to mean accepting free movement of people (52%), closer alignment with EU standards (50%), reducing tuition fees for EU students (45%), allowing more EU fishing in UK waters (37%) or making it harder to trade with non-EU nations (22%).

e. 56% of Britons think Britain was wrong to vote to leave the EU. 62% think that Brexit has been more of a failure than a success. 13% think it has been more of a success. Amongst leave voters, 32% think it has been more of a success and 32% more of a failure (YouGov[15]).

f. 55% would support rejoining the EU, 34% would oppose. However the public are net opposed to joining if the UK could not keep its previous opt-outs. 59% would be in favour of having a closer relationship with the EU, without rejoining the EU itself, the Single Market, or the Customs Union. 20% would oppose. 54% of Leave voters favour a closer relationship (YouGov[16]).

6 Trust in the US and the special relationship has fallen dramatically.

a. While the US is still (narrowly) considered to be the UK's closest ally, the proportion of Britons who believe this has fallen dramatically from 54% in 2024 to 27% in 2026. Just 20% of Britons believe the UK-US relationship is more important than the UK-EU relationship (BFPG).

b. Trust in the US has also fallen dramatically to 27% (down from 53% in 2024 and 38% in 2025). 49% distrust the US to act responsibly, 55% believe President Trump is having a negative impact on the UK economy and 47% on UK national security (BFPG).

7 Distrust of China is higher than for other partners (US, EU) but is continuing to fall (especially amongst the young).

a. There has been a rapid decline in distrust of China (71% in 2024 to 56% in 2026) but a big disparity by age - 76% of over 66s distrust China, compared to only 36% of 18-25s. More younger Britons distrust the US than distrust China) (BFPG).

[15] British attitudes towards the EU – YouGov (May 2025)
[16] How strong is UK support for rejoining the European Union? - YouGov (17 June 2026)

b. However, this doesn't translate into growing support for cooperation with China, particularly in areas of security. However, approximately half of Britons support cooperation on climate change, trade and investment in non-critical goods and services, and research collaboration. 56% actively oppose Chinese ownership of the UK's Critical National Infrastructure (BFPG).

8 **Britons are divided on spending on development aid. Numbers in favour and against spend on aid are broadly even. However, even amongst those in favour there is a belief that most aid is wasted and only a very small minority support a return to spending 0.7% of GNI. A majority believe aid should support UK interests.**

a. In 2013, 43% supported UK aid spending, while 53% opposed. By 2025, support rose slightly to 45%, and opposition dropped to 44%—indicating relative stability over 12 years (Bond[17]).

b. A majority believe aid should support UK interests. Britons believe aid is worthwhile if it contributes to UK economic growth (60%), strengthens national security (62%), protects the UK from future pandemics (59%) and reduces the influence of adversaries (63%) (More in Common[18]).

c. A majority of Britons support programmes which protect women and girls' safety (61%), vaccinate children (60%), tackle hunger and malnutrition (56%), and prevent the spread of infectious diseases (56%) (More in Common).

d. There is a wide spectrum of views on the amount the UK should spend on aid and international development. While only 19% think the UK should spend 0.7% of GNI, 36% of Britons believe spend should be higher than 0.3% and 30% believe it should be lower. The proportion of Britons who believe the UK should spend more than 0.3% of GNI is therefore higher than the proportion of Britons who believe that the UK should spend less (BFPG).

e. There are sharp demographic disparities in attitudes. Younger Britons are more supportive of higher spending on aid, with 53% of 18-25-year-olds and 47% of 26-35-year-olds believing the UK should spend more than 0.3% of GNI, compared to 34% of 36-45-year-olds and 30% of 46-55-year-olds. Among the over 46 age groups, more Britons believe aid spending should be cut below 0.3% than increased (BFPG).

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[17] Summary of Aid Attitudes Tracker – Bond
[18] Public priorities for aid post-cuts – More in Common (June 2025)

f. The political divides are similarly sharp, with 2024 Green (46%), Labour (44%) and Liberal Democrat (44%) voters much more often believing that the UK should spend more than 0.3% of GNI on aid and international development than 2024 Conservative (30%) or Reform UK (23%) voters. Indeed, 51% of 2024 Reform UK and 44% of Conservative voters believe that the UK should spend less than 0.3% of GNI on aid and international development (BFPG).

g. When told the full cost and % of aid spending, 52% of respondents said it should be cut, 26% said it should stay the same, 15% said it should increase (Bond).

h. 56% of the population believe that most aid is wasted. Even among the most engaged audiences, 34% agree that most aid is wasted. Only 18% thought development aid is "effective" or "very effective" (Bond).

9 **Britons remain concerned about climate change though global volatility and domestic economic challenges have led to the deprioritisation of climate action. The majority support the UK's Net Zero by 2050 target and support for renewables remains high. The majority do not see the UK as a leader globally.**

a. Concern about climate change fell from 85% to 78% between 2021 to 2026 (DESNZ – July 2026[19]).

b. 53% of adults say climate change is an important issue (down from 69% in 2023) (ONS[20]).

c. 67% of Britons say they are very (29%) or fairly (38%) worried about climate change and its effects (YouGov[21]).

d. Only 16% consider climate change to be a major threat. Climate change no longer features as one of the top three ranked threats for 18–25-year-olds, despite being the most widely cited threat amongst that age group in 2025 (BFPG).

e. 63% of Britons support the UK's net zero by 2050 target. Support is highest among: Labour voters: 91%, Lib Dem voters: 82%, Conservative voters: 54%, Reform UK voters: 32% (Climate Barometer[22]). Awareness and knowledge levels have remained stable since 2021. But only 52% feel they understand what Net Zero actually means (DESNZ - Spring 2025).

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[19] Public Attitudes Tracker: Headline findings – DESNZ (July 2026)
[20] Environment, climate and nature insights – ONS (July 2026)
[21] UK Climate Change Attitudes – YouGov (July 2026)
[22] New public polling: Behind the noise on net zero – Climate Barometer (May 2025)

f. Around 80% support renewable energy (solar, offshore wind, tidal) as part of the UK's energy security strategy, though support for onshore wind and biomass is lower (73% and 71%) (DESNZ – July 2026).

g. 38% of people agreed (strongly or slightly) that the UK is a global leader in tackling climate, while 21% disagreed that the UK is a global leader in this area. When asked how important it is that the UK is a global leader in tackling climate change, 69% said that it was important (very or fairly important), while 23% said it was not important (DESNZ – Winter 2024).

10 Immigration is increasingly seen as an issue of concern. Only a minority believe migration is good for Britain's economy.

a. The proportion of adults reporting immigration as an important issue facing the UK has increased (43% in Oct 2022 to 59%) (ONS[23]).

b. 36% believe tackling the root causes of irregular migration should be a top foreign policy priority (BFPG).

c. Only 32% think migrants are good for Britain's economy, down from 47% in 2019 and a peak of 50% in 2022. Fall in support has been driven by economic and political challenges (eg COVID and cost of living). Younger people are consistently more positive about immigration than older people and attitudes are polarised along political party lines with Labour, LibDem and Green voters far more positive (53% considering migration is good) than Conservative, UKIP and Reform (13%) (NatCen[24]).

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[23] Public opinions and social trends, Great Britain - ONS (June 2026)
[24] British Social Attitudes 43: A first look - NatCen (February 2026)

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