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P O L L I N G

**2019 US National Public Opinion Survey
Of
Global Strategic Partnerships and Education Diplomacy**

Commissioned by
Association of Marshall Scholars, Inc.

Conducted by
Emerson Polling

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Methodology

Emerson College Polling, under the supervision of Assistant Professor Spencer Kimball is pleased to present the Association of Marshall Scholars with the findings from a survey of American attitudes toward strategic alliances, international partnerships and overseas learning. All respondents interviewed in this study were part of a fully representative sample using an area probabilistic sampling method of N= 1,600 (sample size).

Data was weighted by US parameters. The margin of error for the sample is +/- 2.4% in 19 of 20 cases. The survey was administered contacting landline telephones via IVR, cell phones via text message and online via a panel provided by Amazon MTurk, and was conducted between Oct 24 and 26, 2019.

The results presented in this report include univariate and bivariate analysis of the data. Frequency distributions for each item included on the questionnaire are shown in the tables. In all cases, cross-tabulation results are also shown. This type of bivariate analysis examines differences between sub-groups of the overall population. In the cases where cross tabulation results are presented, a chi-square test, an independent t-test for means, or a Z-test for independent percentages is shown.

A chi-square test is used in cases where comparisons are made for categorical variables. A t-test is used in cases where comparisons are made for measurement variables. A Z-test is used in cases where comparisons are made between independent population percentages.

The purpose of these statistical tests is to determine whether or not the observed difference between sub-groups in the sample is due to sampling error or whether it is due to a real difference in the population. When the results are statistically significant, it strongly suggests that the observed difference between sub-groups found in the sample is due to a real difference in the population, and not due to sampling error.

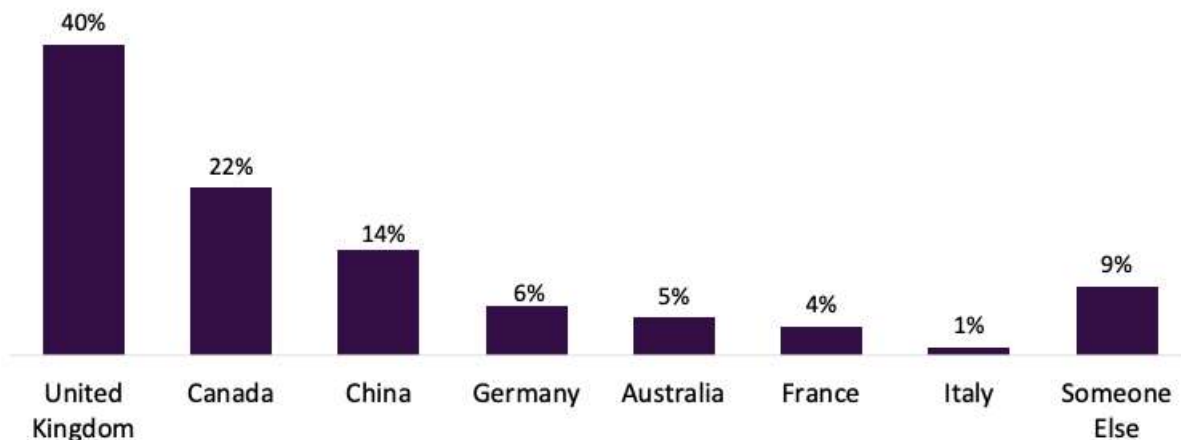
A chi-square significance level of .05 indicates significance at the 95 percent level. In other words, it is 95 percent likely that the results are due to a real difference between comparison groups. A chi-square significance level of .01 indicates significance at the 99 percent level. When a t-test or a Z-test is shown, lower- and upper-case letters indicate significance at the 90 and 95 percent levels respectively.

Results



Which country do you think is the most valuable ally and strategic partner of the United States?

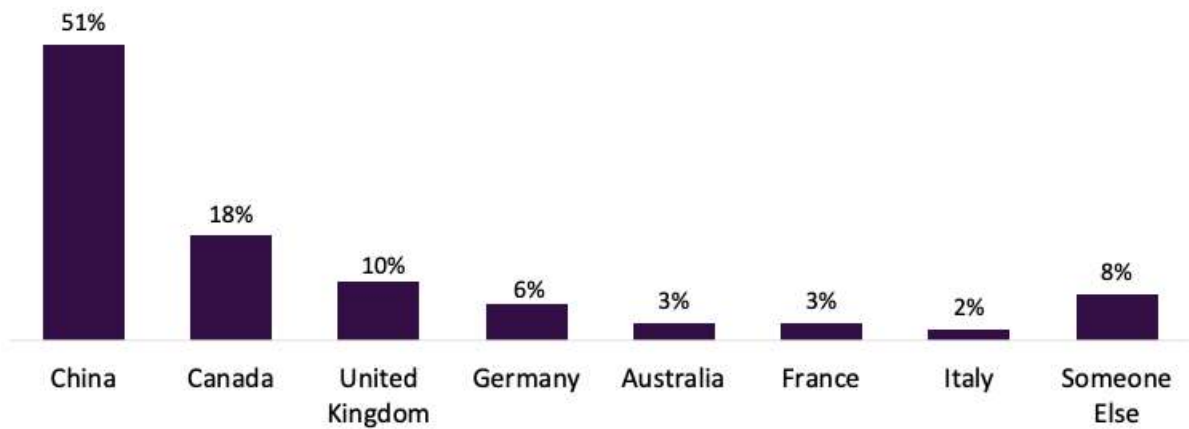
National, October 24-26, 2019, MM, N = 1600, +/- 2.4%



- The UK is seen as the most valuable strategic partner at 40%. This is a 10 point increase from 2018, which still had UK as most strategic partner (30%).
 - 18-29 year olds were more divided in their viewpoint: 28% said China is the US's most strategic partner while 28% said the UK. 26% of this age group saw Canada as the most valuable strategic partner.
 - China drops in influence as age increases: 15% of those 30-44 ranked China as the most strategic and about 8% of those over 45 ranked them as most strategic
 - The UK's strongest support is with 30-64 year olds at 47%. The UK is also the top choice of those over 65, (34%).
- The viewpoint that the UK is the most strategic partner is shared across the United States, every region in the US viewed the UK to be the US's most strategic partner.

Which country is the most attractive for business and trade opportunities?

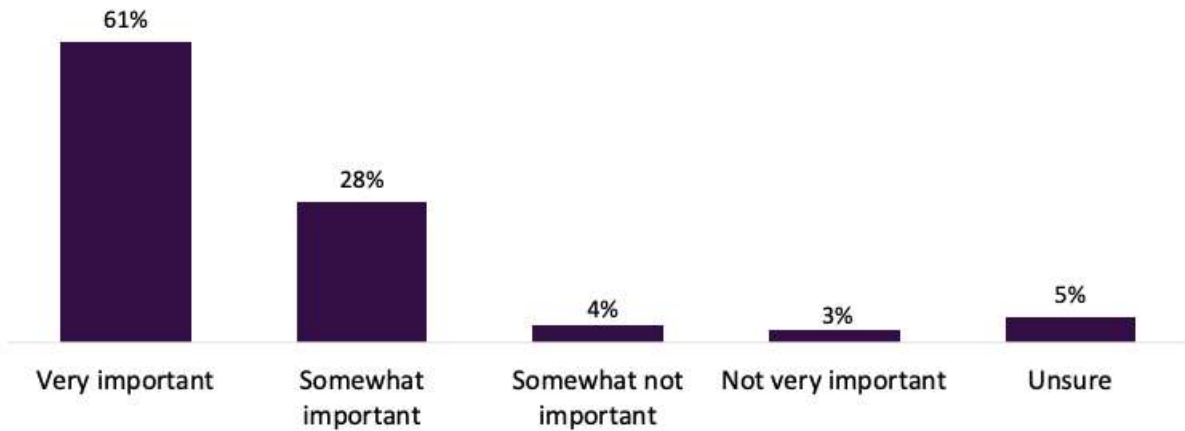
National, October 24-26, 2019, MM, N = 1600, +/- 2.4 %



- China increased its share as the most attractive for business and trade at 51% up from 48% in 2018. The UK saw a slight increase from 6% in last year's report to 10% in 2019's results.
- There was no significant difference regarding respondents' demographic and attitude about China being the most attractive for business and trade opportunities and little variability among the other countries

How important is a good relationship between the United States and the United Kingdom today?

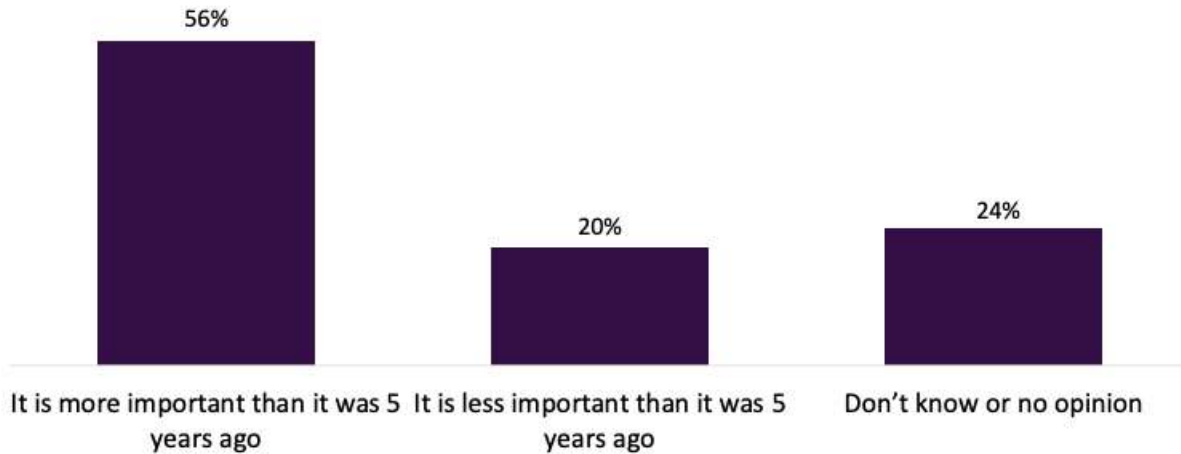
National, October 24-26, 2019, MM, N = 1600, +/- 2.4 %



- A good relationship with the US and UK remains very important for voters at 89% with 61% saying it was very important.
 - These are similar results to 2018 where 65% said very important, 26% somewhat important.
- There was an increase in negative sentiment about the relationship between the US and the UK, 7% viewed the relationship to be not important, up 4 points from 2018 (3%).

Is the US-UK relationship more or less important today than it was 5 years ago?

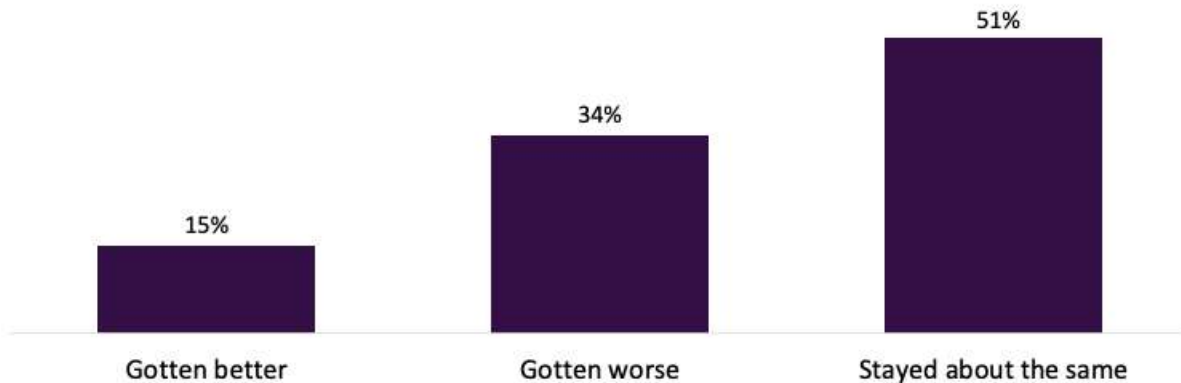
National, October 24-26, 2019, MM, N = 1600, +/- 2.4%



- Nearly 3:1 said the US-UK relationship is more important than it was 5 years ago.
 - This is similar to the 2018 report, where 58% said it was more important than it was five years ago and 20% said it was less important.
- All age categories found the US-UK relationship to be more important than it was five years ago.

In the last year, do you think relations with the United Kingdom and the United States have gotten better, gotten worse, or stayed about the same?

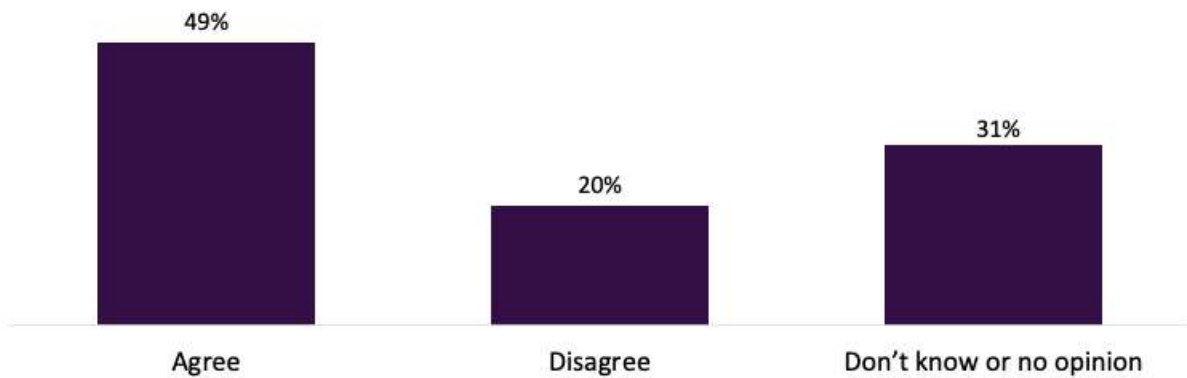
National, October 24-26, 2019, MM, N = 1600, +/- 2.4 %



- The plurality of all demographics think that relations with the UK and US have gotten worse rather than gotten better.
- There is variance among those who get their news and current events information from newspapers, 41% say relations have gotten worse. The same amount (41%) who watch TV for news say relations have gotten worse. 28%

Do you agree or disagree with the following statement;
I am satisfied with current U.S. foreign policy towards the United Kingdom

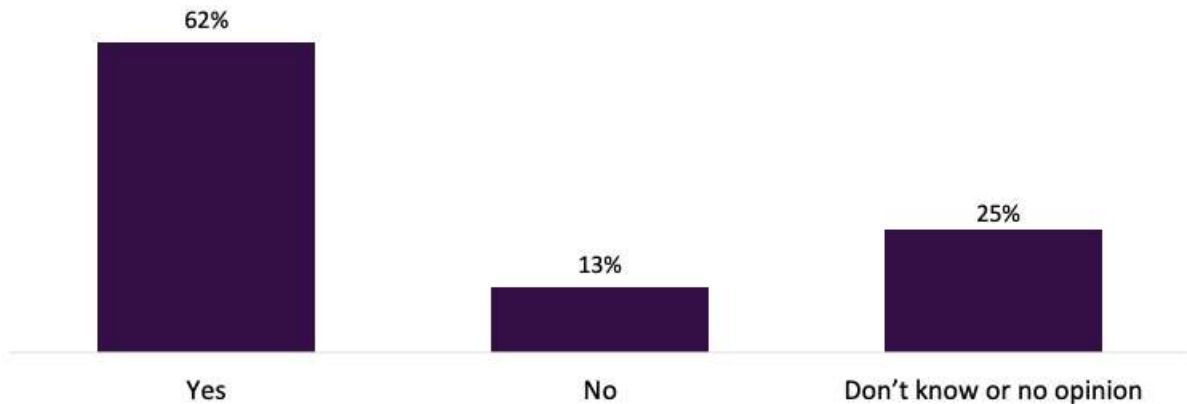
National, October 24-26, 2019, MM, N = 1600, +/- 2.4 %



- Americans are satisfied with US foreign policy towards the UK 49% to 20%.
 - In 2018, was American satisfaction was 52% agree to 24% disagree.
- The region with the highest satisfaction of US foreign policy towards the UK is the West (53%), followed by the South (51%), the Midwest (45%), and lastly the Northeast (43%).

Barring political changes, the United Kingdom is currently slated to leave the European Union, which is referred to as "Brexit", should the US develop a special trade relationship with the UK once that happens?

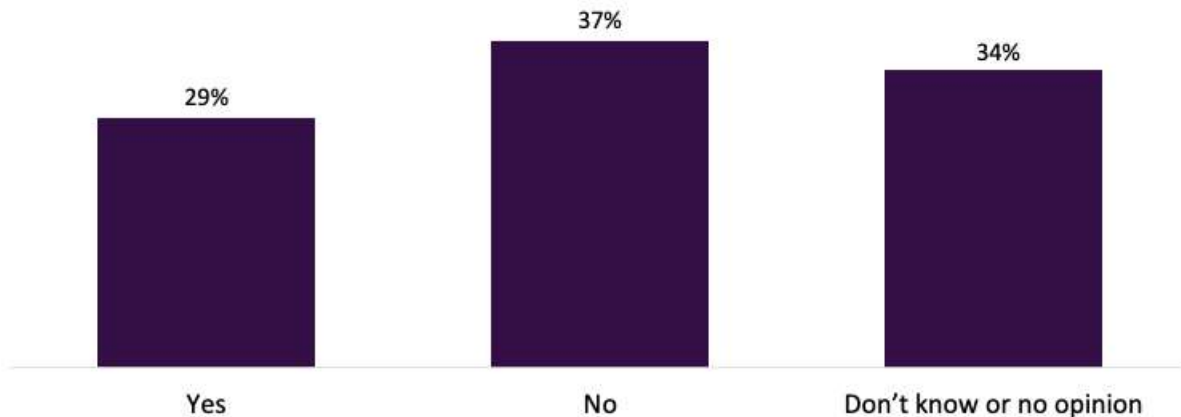
National, October 24-26, 2019, MM, N = 1600, +/- 2.4 %



- 62% responded that they want a special trade relationship with the UK once the UK leaves the European Union, 13% said they do not.
 - This is about the same as 2018, where 63% responded they want a special trade relationship and 11% did not.
- As levels of education increases, the interest in a special trade relationship increases, though the majority of each education level wants a special trade relationship with the UK.
 - Among those with a high school degree or less, 57% want a special trade relationship.
 - Among those with some college education, 60% want a special trade relationship.
 - Among those who have a college degree, 68% want a special trade relationship.
 - Among those who have a Postgraduate degree, 73% want a special trade relationship.

Are you in favor of the United Kingdom leaving the European Union?

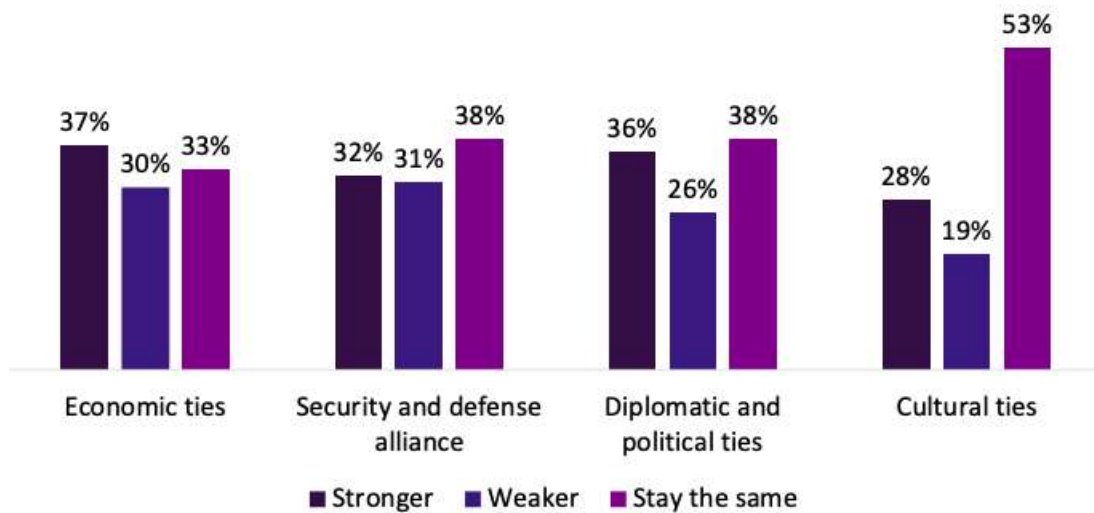
National, October 24-26, 2019, MM, N = 1600, +/- 2.4 %



- The plurality of Americans (37%) are opposed to the UK leaving the EU. 29% were in favor of the UK leaving the EU and 34% were either undecided or had no opinion.
- Gender is an important component in Brexit support:
 - Males are slightly more in favor of the UK leaving the EU at 37% support; 36% oppose leaving the UK leaving the EU
 - 39% of females oppose the UK leaving the EU and 21% support the UK leaving the EU
- Higher educated Americans are more likely to be opposed
 - Those with a high school degree or less: 31% not in favor of the UK leaving the EU
 - Those with some college education: 38% not in favor of the UK leaving the EU
 - Those with a college degree: 42% not in favor of the UK leaving the EU
 - Those with postgraduate degree, 49% not in favor of the UK leaving the EU

In each of the following areas, please tell us if you think the US/ UK alliance will be stronger, weaker or stay the same, once the United Kingdom leaves the European Union

National, October 24-26, 2019, MM, N = 1600, +/- 2.4 %

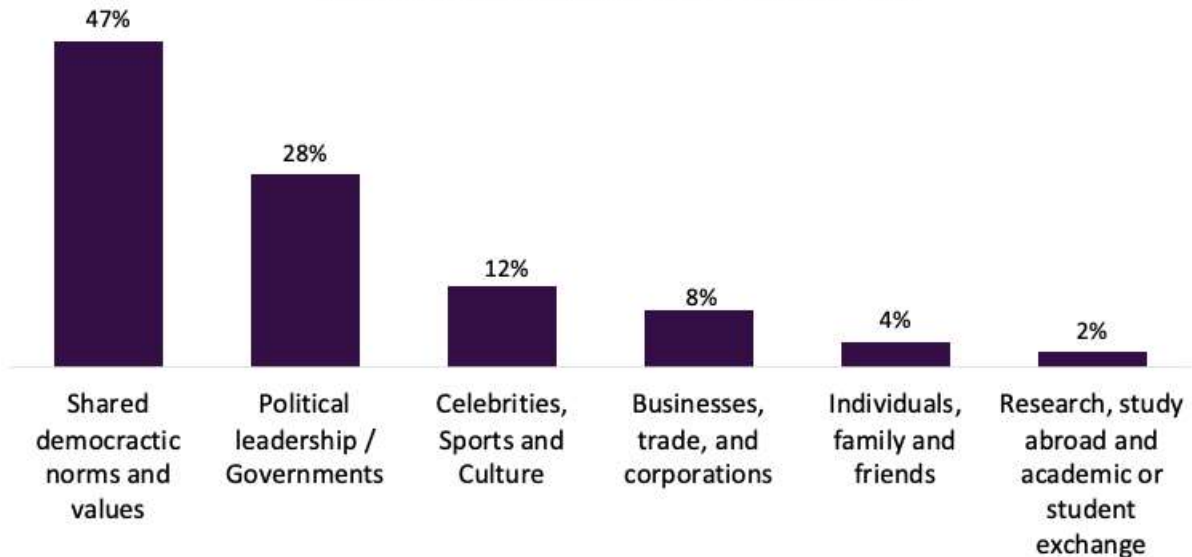


- In all four areas, the general sentiment was the US/UK alliance would be stronger upon exiting the European Union.
 - Economic: 37% stronger to 30% weaker
 - Security: 32% stronger to 31% weaker
 - Diplomatic and political: 36% stronger to 26% weaker
 - Cultural: 28% stronger to 19% weaker
- Economic Ties:
 - Men were more likely to think the US/UK alliance would be stronger regarding economic ties upon the UK exiting the EU.
 - Men: 44% stronger, 26% weaker
 - Women: 31% stronger, 34% weaker
 - The Midwest is the most pessimistic of regions about economic ties. 32% said the alliance would be stronger and 32% said the alliance would be weaker.
- Security and Defense alliance

- Males see the US/UK security and defense alliance getting stronger whereas females see the alliance getting weaker
 - Men: 37% stronger, 28% weaker
 - Females 27% stronger, 34% weaker
- Those with some college education or less say things will be stronger while those with a college degree or more say things will be weaker
 - Some college or less: 33% stronger, 28% weaker, 39% it will stay the same
 - College degree or postgraduate degree(s): 29% stronger, 35% weaker, 36% it will stay the same
- Diplomatic and Political Ties:
 - The Midwest is the most skeptical region regarding the strengthening of UK/US diplomatic and political ties once the UK leaves the EU. 30% said the US/UK alliance will be stronger, and 29% said it would be weaker.
 - 39% of men think diplomatic and political ties will be stronger once the UK leaves the EU and 22% think it will be weaker, compared to 33% of women think ties will be stronger and 30% think it will be weaker.

In your opinion, which of the following has the most significant influence on strong ties between the United States and the United Kingdom?

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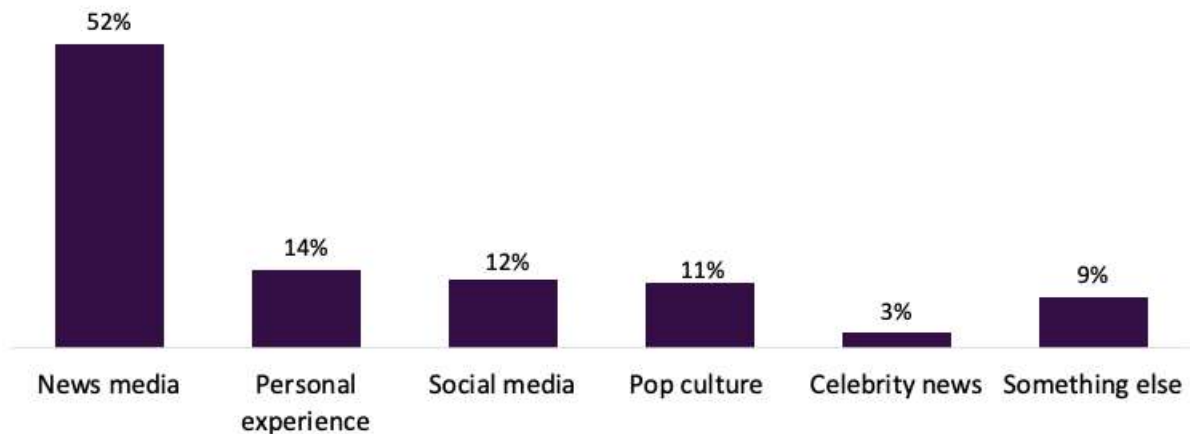


- Shared Democratic norms and values was found to have the most significant influence on strong ties between the US and UK (47%), followed by political leadership (28%).
- This is a sharp change from 2018 when Political leadership ranked first (38%) and shared values followed (21%).
 - There is a strong contrast in opinion among 18-29 year olds and those with a high School degree or less and with the general population.
 - This demographic has more confidence in political leadership than shared values 36% of 18-29 year olds think the political leadership has the most significant influence on strong ties between the US and UK.

- The percentage of Americans who say political leadership has the most significant influence decreases as age increases.
 - 27% of 30-44 year olds, 26% of 45-64 year olds, and 23% of those 65 and thought political leadership has the most significant influence on strong ties between the US and UK. (18-29, 36% to 34%; HS<, 31% to 38%).
- The percentage of those who think shared democratic norms and values has the most significant influence increases as education levels rise.
 - 38% of those with a high school degree or less think shared democratic values and norms has the most significant influence, 52% of those with some college, 52% of those with a college degree, and 58% of those with a postgraduate degree or higher think this is the most significant influence.

Which of the following is your main source of knowledge of the United Kingdom?

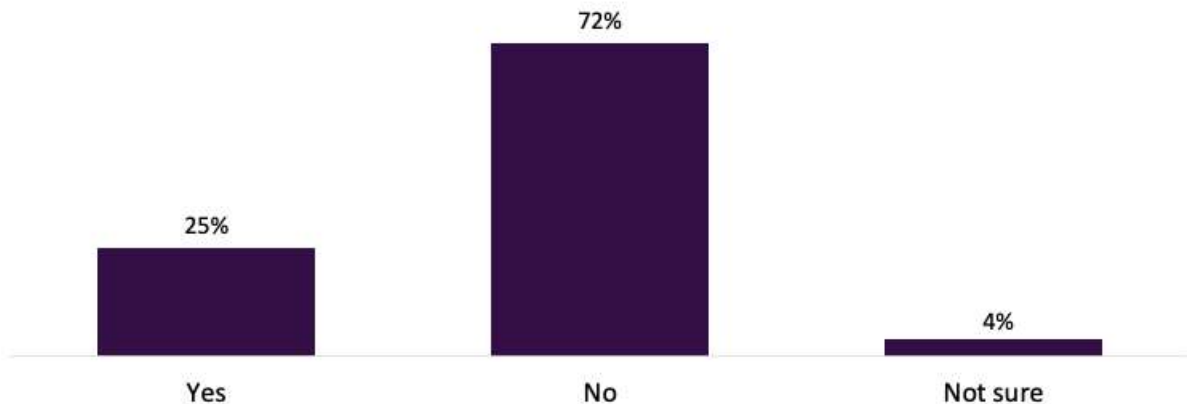
National, October 24-26, 2019, MM, N = 1600, +/- 2.4 %



- The main source of knowledge is the News Media (52%). The News Media was the main source of information in 2018, but increased 11 points since then (41%).
- Pop Culture significantly dropped as a source of knowledge, from 24% in 2018 to 11% in 2019. Other categories were consistent with the 2018 report.
 - Younger Americans (18-29) are the demographic most likely getting their information from Pop Culture with 21% reporting that as their main source of knowledge about the UK.
 - Younger Americans, (18-44) are twice as likely to use social media as a source than those over 45.
 - Americans 45 and older are more likely to rely on personal experience as their source of knowledge

Do you have family or friends from the United Kingdom or living in the United Kingdom?

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- The number of Americans who report having family or friends from the UK or who live in the UK is slightly down from 2018. This dropped from 32% to 25%.
 - This drop could suggest a trend of Americans shifting away from moving to the UK and should be further considered.
- There is a regional difference in those who have friends or family living in the UK or from the UK; those in the Northeast are more likely to have connections to the UK than those in the West.
 - Northeast: 28% have family or friends in the UK
 - South: 25% have family or friends in the UK
 - Midwest: 24% have family or friends in the UK
 - West: 21% have family or friends in the UK

Have you ever traveled outside the United States?

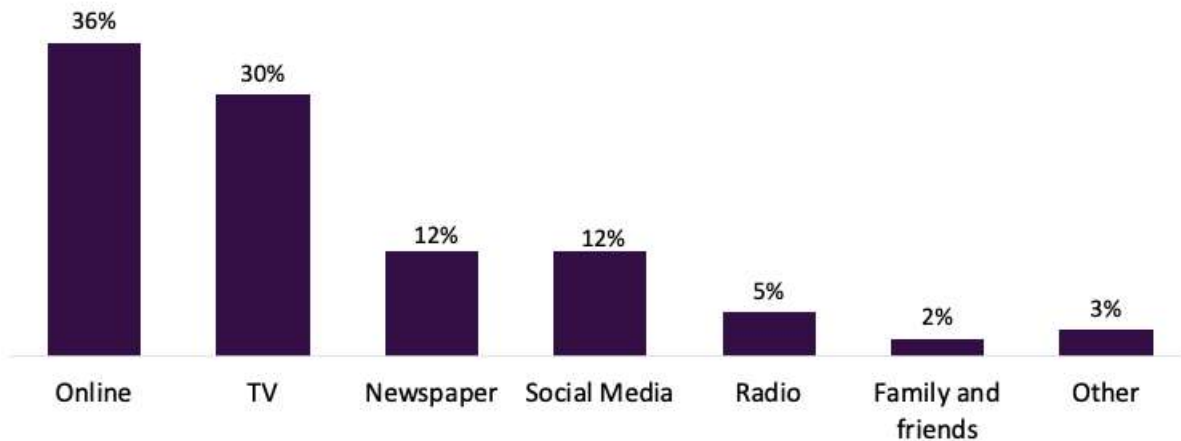
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- 68% of the respondents have traveled outside the US, an increase from 2018 where 66% said they had traveled outside the US.
- The most significant factor in whether an American travels is their level of educational attainment.
 - Those with a High School Degree: 52% have traveled outside the US
 - Some College: 66% have traveled outside the US
 - College Degree: 84% have traveled outside the US
 - Post Graduate: 88% have traveled outside the US
- Age is the second most significant factor, as older Americans are more likely to have traveled outside the US.
 - Among those over 45, 73% have traveled outside the US, compared to those under 29, 56% have traveled outside the US.

Where do you get your news and current events information?

National, October 24-26, 2019, MM, N = 1600, +/- 2.4%



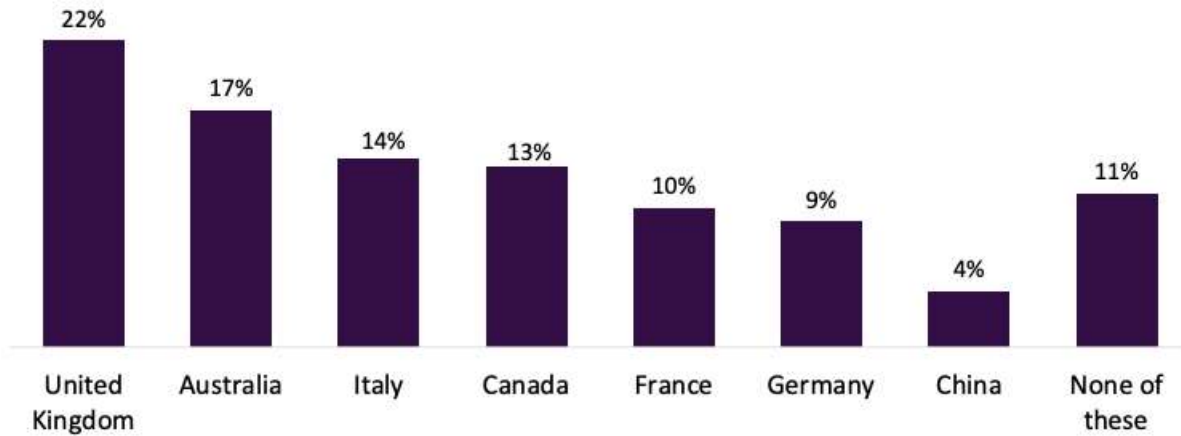
- The plurality of respondents (36%) said they get their news and current events information online. This is up 2 percentage points from 2018 (34%).
- Since 2018, the percentage of respondents who got their news from social media dropped from 17% to 12%
- 30% of respondents said they got their news from TV, up from 25% in 2018.
- Regional Differences:
 - Online websites are the most popular source for Americans throughout the country except the Midwest, TV 37%, Websites 34%
 - In the Northeast, 32% Online, 28%, TV, 20% Newspaper
 - The west ranked higher in social media use at 17%
- Educational attainment influences sources usage
 - Those with Some College or less use Television as much if not more than Online Website while those with a College degree or more use online website nearly 2:1 over TV
- Younger people, those under 44 are likely to use Online Websites at 50% saying that was their source of news and current events while those over 65, only 8% said websites.
- Perhaps the attention given to Social media like Facebook and twitter has hurt the platforms as TV increased in popularity as their main source of news.

Scholars Programs

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If you had a chance to study outside the US, which country would you find most attractive as a place to study?

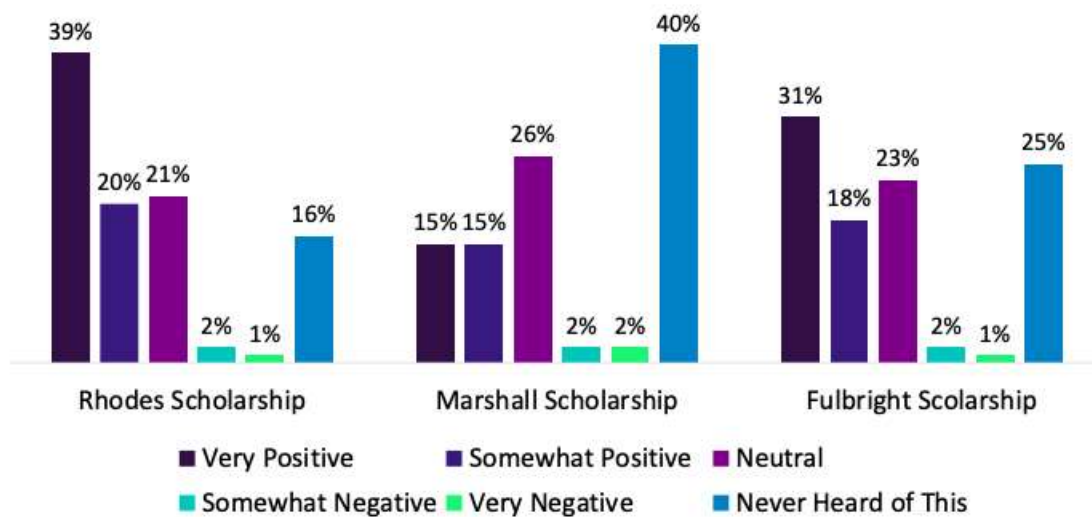
National, October 24-26, 2019, MM, N = 1600, +/- 2.4 %



- If respondents had the chance to study outside the US, the UK was the most popular (22%), followed by Australia (17%).
- This is about the same from 2018, with UK at 22% and Australia at 20%,

When you hear the name of the following scholarship programs, what is your first reaction?

National, October 24-26, 2019, MM, N = 1600, +/- 2.4 %



- All three scholarship programs had a decrease in general recognition 2018 to 2019. Programs should look at their communication strategies to increase positive image and overall name recognition since the UK as a destination is the most popular.
 - 59% had a very positive or somewhat positive reaction to the Rhodes Scholarship, and 16% had never heard of it. In 2018, 63% had a very or somewhat positive reaction, and 17% had never heard of it.
 - 30% of respondents had a very or somewhat positive reaction to Marshall 2019 15/15 NH 40 - 2018: 22/17 NH 38
 - Fulbright- 2019 31/18 NH 25 - 2018: 34/22 NH 23

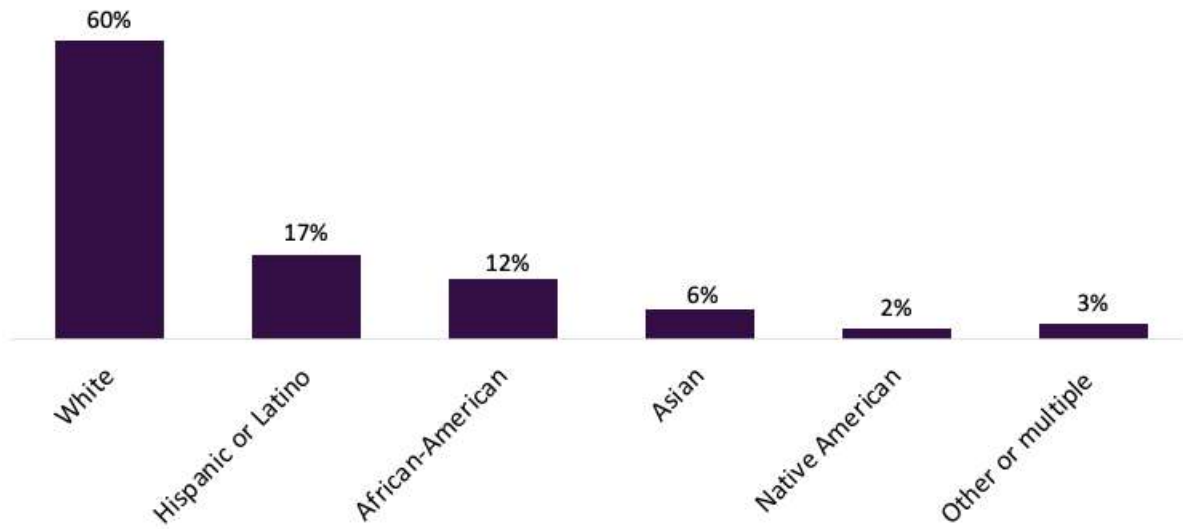
- The ability to name a Marshall Scholar dropped from 13% to 7% from 2018 to 2019 which is in the polls margin of error but this should be monitored.

Demographic Charts



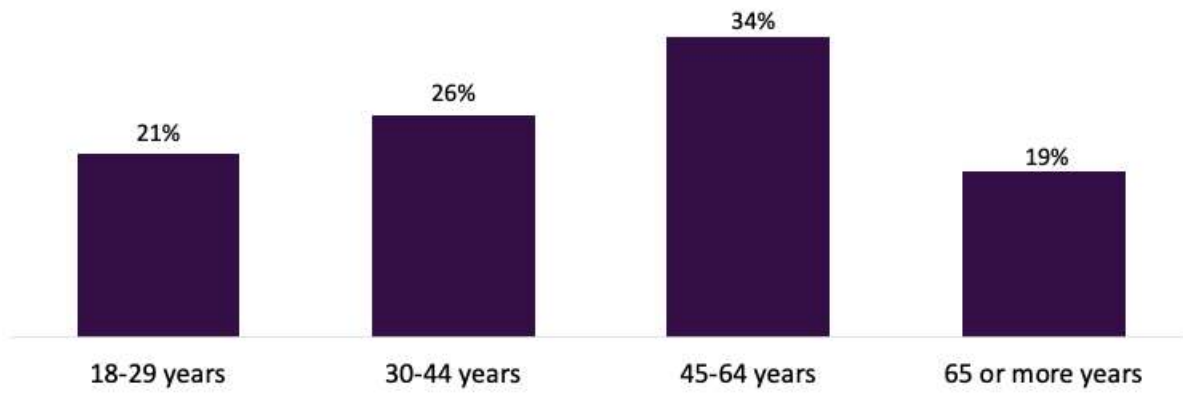
Ethnicity

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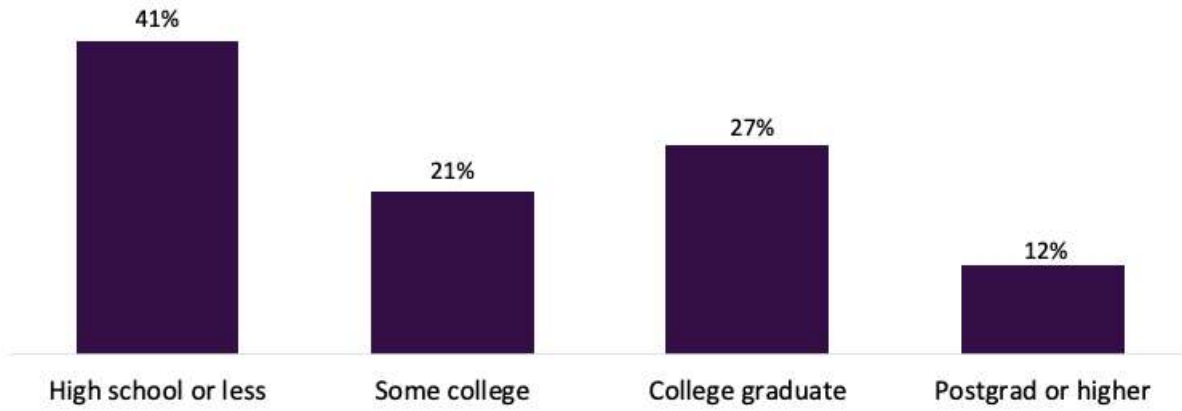
Age

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Educational Attainment

National, October 24-26, 2019, MM, N = 1600, +/- 2.4%



Region

National, October 24-26, 2019, MM, N = 1600, +/- 2.4%

