

Attitudes Towards Britain and the British

Brazil

**Research Study Conducted for
the British Council**

May - August 1999

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Preface

This report contains the findings of a study conducted for the British Council by Market & Opinion Research International (MORI) among a group defined as the 'successor generation' in Brazil. This formed part of a project which took place in thirteen countries around the world.

Background and Objectives

As the British Government's principal agency for cultural relations overseas, the British Council's overarching objective is to enhance the reputation of the United Kingdom in the world as a valued partner. In order to better understand how people in different countries perceive the United Kingdom, the Council instigated this market research study.

The main purposes of research into Britain's image were three-fold:

- to form a baseline of reliable data, to be used for targeting work, and measuring its effectiveness
- to test hypotheses about Britain's image and ways to improve/re-shape it
- to provide 'credible evidence' of attitudes towards Britain and their variation by country and audience

The survey covered thirteen countries, with plans to extend it to further countries in 2000. The thirteen countries covered this year were:

Brazil
China
Egypt
France
Germany

India
Malaysia
Mexico
Poland

Russia
Saudi Arabia
South Africa
Turkey

The target population was defined as the 'successor generation', i.e. those who might be expected to become the decision makers of future years. The precise definition varied from country to country, to take into account specific cultural factors (and was agreed in consultation with MORI's partner in each country and the local British Council office).

In Brazil, the definition used was:

- Aged 24-35
- Working on MBAs or equivalent higher degrees, and working at the same time. Sectors: Administration, Economy and Marketing
- Have completed college education at leading universities and currently occupy management level or staff positions linked directly with the CEO or Board of the top 50 companies in each sector of the economy
- Public sector

Methodology

The survey was conducted in two distinct phases, beginning with two **qualitative focus group discussions** in Brazil. The groups were held in São Paulo on 5th and 6th May 1999. Again, the decision as to which city to use was taken in consultation with MORI's local partner and the British Council office in Brazil. The groups they were moderated by an experienced researcher with MORI Brasil in Brazil.

The objectives of this first stage were to:

- Explore how people perceive Britain:
 - top of mind thoughts
 - what feelings they have towards Britain
 - positive and negative images
 - where Britain stands in their consciousness generally
 - knowledge about Britain
- Discover opinion-forming processes:
 - what factors influence an opinion & how ?
 - what would be the most effective methods of influencing people's opinions ?
- Establish extent to which there is an overlap between the British Council's strategic objectives and perceptions of the successor generation
- Help identify the most important topics for the quantitative stage

On completion of the group discussions, MORI's local partner provided a transcript of the discussion (in English) and a short summary report of the findings. A debrief meeting was then held by MORI in London, to feed back the results to the British Council, and to help shape the **quantitative survey** which followed.

In Brazil, this was undertaken among 206 members of the same target audience. Interviewing was conducted face-to-face between 14th July and 18th August 1999.

Quotas were set to ensure that a reasonable cross-section of members of the successor generation were interviewed. Again, interviewing was concentrated in those cities where it might reasonably be expected that up and coming decision makers might be present in large numbers.

Report Layout

This report will concentrate on the results for Brazil, and compare them to world-wide results. The report is based on the quantitative findings, illustrated throughout with verbatim comments from the focus group discussions. Copies of the English language versions of both the questionnaire and topic guide are appended.

Interpretation of the Data

Where percentages do not add to 100%, this may be due to computer rounding or to multiple-response questions, whereby respondents could give more than one answer to a question. An asterisk denotes a value of less than 0.5 per cent, but greater than zero. Details on the statistical reliability of the data contained in the report are appended.

Publication of the Data

These findings are subject to the Terms and Conditions of Contract agreed at the outset of the project. Any press release or publication of the findings of this survey requires the advance approval of MORI. Such approval is only refused on the grounds of inaccuracy or misinterpretation of the research findings.

Summary of Findings

Familiarity and Favourability with Key Countries

Amongst the successor generation in Brazil, the United States is by far the most well-known country of those measured. Indeed, the 73% who know the United States very or fairly well is much in line with the all country average of 71%.

In second place is the United Kingdom, albeit some way behind the United States. Two in five feel they know the United Kingdom very or fairly well (40%), however, few say they know us 'very well' - 7%. This is one of the lowest figures recorded world-wide, behind Mexico, China and Russia. Most members of the successor generation in Brazil feel they know just a little (46%).

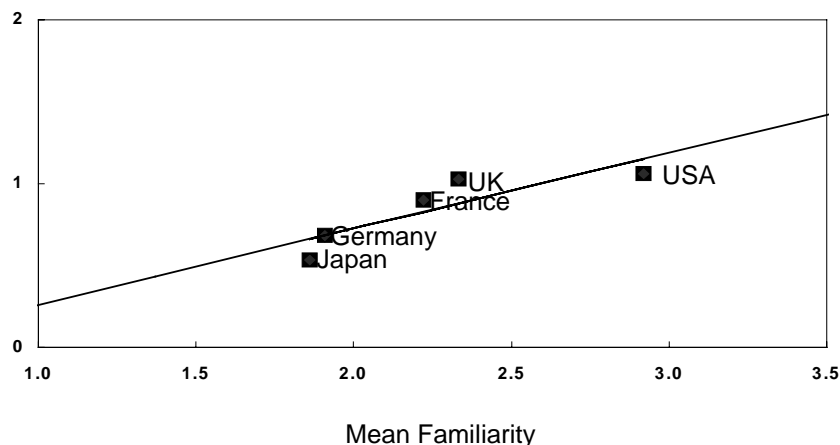
The remaining three countries measured record relatively low profiles in Brazil. Indeed, in each case, they receive one of the lowest scores world-wide. Around a quarter say they know France 'very well/a fair amount' - 28%, ahead of only China and Malaysia. One in six say the same about Germany (16%), the lowest score given across all thirteen countries in this survey. Japan receives a familiarity rating of 13%.

The United States, the United Kingdom and France all record similar favourability ratings among the successor generation in Brazil; between 79% and 81% of those who know at least a little about them say they are 'very' or 'mainly' favourable. These scores are relatively higher than the world-wide figures. Although, the United States is relatively more likely to be viewed in a 'very' favourable light - 33% of those who know at least a little about it say this about the United States compared to 24% who feel the same about the United Kingdom - fewer say this about France (17%). Germany is in fourth place with two-thirds saying they are favourable (62%) and around three in five feel the same towards Japan (57%).

The chart overleaf shows how well people feel they know each of the five countries, along the bottom axis – the further to the right a country is, the better people feel they know it. On the side axis is overall favourability towards each country. The diagonal line is known as the 'line of best fit'. It shows the mid point of all the countries measured. It shows the strong position of the US in terms of both familiarity and favourability, but also clearly demonstrates that the UK and France are not far behind in favourability terms.

Familiarity & Favourability Towards Countries

Mean Favourability



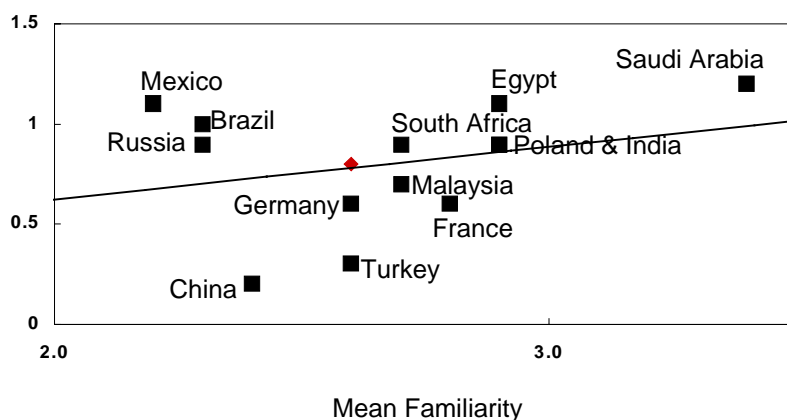
Base: All successor generation in Brazil (206)

* The familiarity scale runs from 0 to 4, based on a score of 0 for 'know almost nothing about' to 4 for 'know very well'. The favourability scale is from -2 to +2, based on -2 for 'very unfavourable' to +2 for 'very favourable'

The chart below compares the UK findings in Brazil with the findings in the other 12 countries. It shows the relatively low level of knowledge that Brazilians have of the UK (only in Mexico is it less well known) but that, nonetheless, it is held in high regard.

Familiarity & Favourability Towards the United Kingdom

Mean Favourability



Base: All successor generation in 13 countries (2,925)

Images of the United Kingdom

The successor generation in Brazil are most likely to recognise England as being part of the United Kingdom (86%). This is line with the all country figure of 83%. Scotland however, is only mentioned by 65% compared to all country average of 77%. Wales is also recognised by relatively fewer compared to the world-wide results (48% vs 65%). This is not the case for Northern Ireland; recognised by 66% (68% is the world-wide figure). One in seven spontaneously say the United Kingdom is the same as Great Britain.

Whisky is by far the most dominant image of Scotland, nominated by 42%, which is twice as many as the next most recognised image; kilts (21%). In fact more members of the successor generation in Brazil nominate whisky as the image of Scotland than in any other country in the study. Highlands and mountains is the only other relatively strong image that emerges -13%. Bagpipes receive 6% of the nominations.

In line with the all country figures, Northern Ireland largely conjures up images associated with the on-going religious conflict. Three in ten mention the IRA and Sinn Fein (30%), and a quarter say violence and religious wars (25%). Indeed, Brazil is the only country, along with Turkey, where the 'IRA and Sinn Fein' are mentioned by a significant proportion in addition to 'violence and religious wars'. Around one in ten are unable to nominate an image associated with Northern Ireland (12%), as they are world-wide (11%).

Wales is the country within the United Kingdom that defeats the most members of the successor generation in Brazil; around a third are unable to nominate an image of Wales (32%). Castles receive the most nominations; one in eight (12%), a similar proportion say Prince Charles (10%), slightly above the all country average of 6%.

As world-wide, the Royal Family is the most frequently mentioned image of England in Brazil (29%). However, along with Turkey, this is the highest number of nominations the Royal Family receives out of the thirteen countries covered by this study. Indeed, they are twice as popular as the next most frequently mentioned image, the Houses of Parliament and Big Ben (14%). One in twenty mention tradition and conservatism (5%). All other images are nominated by less than 5%.

Images of UK Countries (Spontaneous)

Q14-17 What one image best sums up to you ?

(Top Answers)

Scotland	%	Northern Ireland	
Whisky	42	IRA/Sinn Fein	30
Kilts	21	Violence	25
Highlands/Mountains	13	Scenery	6
Bagpipes	6	Religion	6
Castles	2	Cold/rainy weather	4
		Peace Process	2
		Guinness	2
Nothing/don't know	1	Nothing/don't know	12

England	%	Wales	%
The Royal Family	29	Castles	12
Houses of Parliament/Big Ben	14	Prince of Wales	10
Tradition	5	Mountains	4
London	4	The Valleys	2
Tower of London/Beefeaters	3	Princess Diana	2
Margaret Thatcher	3		
Football	2		
Tony Blair	2		
Powerful Economy	2		
A country pub	2		
Nothing/don't know	*	Nothing/don't know	32

All other answers 1% or less

Base: All successor generation in Brazil (206)

Britain's Strengths & Weaknesses

World-wide, the United Kingdom's history tradition and culture are very much a double-edged sword. While tradition, culture and heritage are the aspects most likely to be mentioned spontaneously as our major strength (13%), phrases such as traditional, conservative and out-of-date for the modern world, attract most mentions as our major weakness (11%).

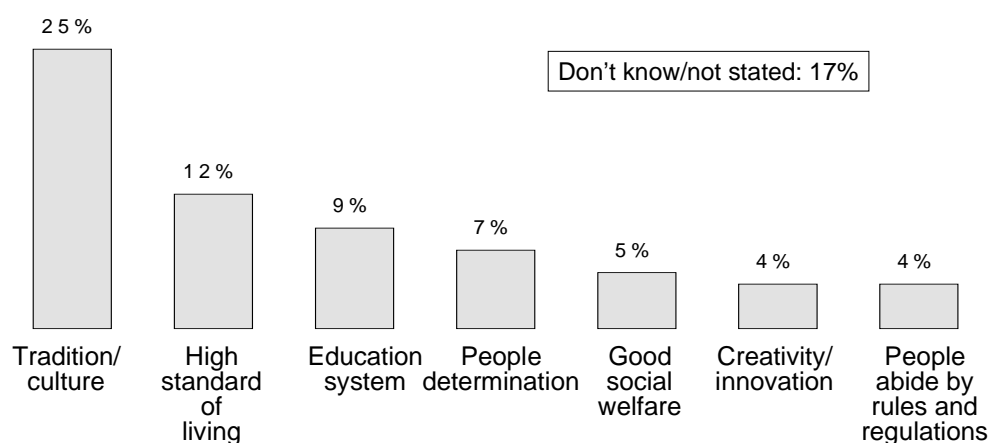
In Brazil, however, the pattern is quite different; only one member of the successor generation in Brazil feels that tradition and conservatism are our major weaknesses. In contrast, a quarter say that the United Kingdom's conservatism, tradition and cultural heritage are a major strength (25%). Other strengths mentioned, although by relatively fewer, are the high standard of living (12%), the education system (9%) and the people's determination and self-endurance (7%).

The population has a better quality of life. The British people know how to separate the professional side and the personal life

Everybody has the opportunity to study and the schools have a high level of education

The United Kingdom's Major Strengths (Spontaneous)

Q31 What do you think is the United Kingdom's one major strength ? (Top mentions)



Base: All successor generation in Brazil (206)

Despite the more positive view that Brazilian members of the successor generation have about our traditions and our cultural heritage, one in five feel that we are cold and reserved (20%). This is the highest score across all thirteen countries measured; the all country average is 3%. Several other weaknesses cited in Brazil are above the world-wide figures. For example, our society is viewed as socially discriminating by 17%, in contrast to all country average of 2%, the political system is also viewed as a weaknesses by 12%, compared to 2% world-wide. The conflict in Northern Ireland is mentioned by 7%, which is more in line with the world-wide figures (5%).

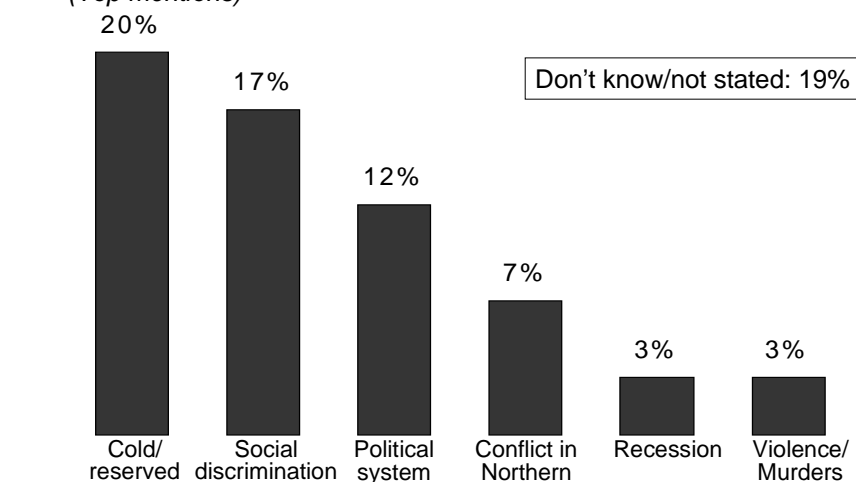
The most negative aspect is the cultural arrogance. They have a sense of superiority towards other countries

They are very strict in their relationships. They are very formal and should be more opened to foreign contact. They are not a bit receptive

The worst matter that they have to face is domestic terrorism (IRA). This internal war in Ireland, with bomb problems, creates a dangerous atmosphere and a sense of insecurity for the whole country

The United Kingdom's Major Weaknesses (Spontaneous)

Q30 What would you say, overall, is the United Kingdom's one major weakness? (Top mentions)



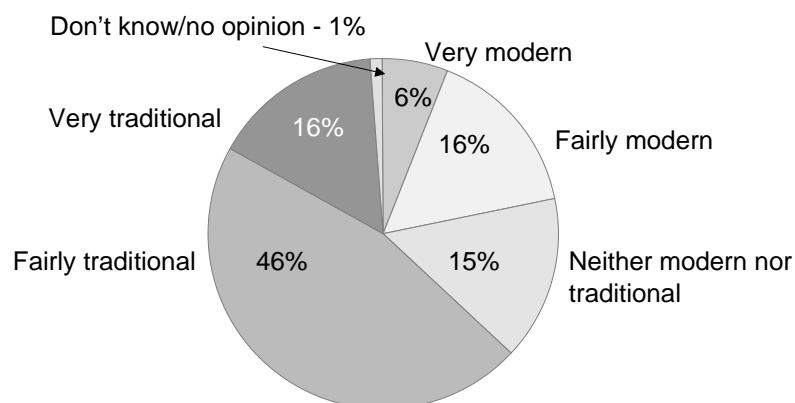
Base: All successor generation in Brazil (206)

British Society

In line with the world-wide figures, British society is seen by Brazilian members of the successor generation as largely traditional. Indeed, in Brazil, British society is relatively more likely to be viewed as traditional than modern, in a ratio of three to one (62% vs 22%), although, members of the successor generation tend to view it as 'fairly' traditional rather than 'very' traditional (46% vs 16%). Encouragingly, two in five see us as modern (22%), and a further 15% say we are neither modern nor traditional.

British Society: Modern vs Traditional ?

Q18 Thinking about British society generally, taking your answer from this card, how modern or traditional would you say that it is ?



Base: All successor generation in Brazil (206)

The national health service in Britain is perceived as one of the strongest aspects of our society. More than three-quarters in Brazil agree that 'Britain has a good national health service' – 77% - a third 'strongly' agree with this statement. This is higher than the all country average of 65% and puts Brazil in fifth place out of the thirteen countries measured, behind Egypt, India, Saudi Arabia and Russia.

Other particularly positive aspects of our society are thought to be our commitment to protecting the environment (68% agree, as 65% do world-wide) and our legal system, which is perceived to ensure a fair trial for everyone (68% agree). This score is higher than the world-wide figures and is amongst the top four results across all the countries in this study.

British Society Overall

Q26 I am now going to read out some statements that have been made about British society. I would like you to tell me to what extent you personally agree or disagree that they represent the UK.

	Agree %	Disagree %	Neither /nor %	Mean score *	Mean score World- wide*
Britain has a good national health service	77	5	7	+1.2	+0.9
The British legal system ensures that everybody gets a fair trial	68	6	14	+1	+0.7
Britain is committed to protecting the environment	68	11	17	+0.8	+0.8
British society is truly 'multicultural'	61	23	14	+0.6	+0.6
The British system is a good example of democratic government	58	29	12	+0.4	+0.7
British people are not very welcoming towards foreigners	50	25	20	+0.4	+0.2
British people are not racially tolerant	34	38	22	-0.1	+0.1
Britain no longer has a comprehensive system of social welfare	16	25	28	-0.2	-0.04
Britain is now a 'classless' society	14	73	12	-0.9	-0.8
Women are discriminated against in Britain	10	66	16	-0.9	-0.7

*Mean scores are calculated by giving 'strongly agree' a score of +2, 'tend to agree': +1, 'tend to disagree': -1, and 'strongly disagree': -2. This gives a potential range of -2 to +2.

Base: All successor generation in Brazil (206)

Amongst the successor generation in Brazil, British society is perceived to be less democratic than it is world-wide. Two-thirds world-wide say that 'Britain is a good example of democratic government'. The proportion falls to 58% in Brazil, although respondents are more likely to 'tend to disagree' rather than 'strongly disagree' (18% versus 11%).

In terms of Britain's system of social welfare, Brazilians tend to feel that we have a comprehensive system, although a substantial minority (28%) neither agree nor disagree. Less than one in five agree that Britain no longer has a comprehensive system of welfare (16%), while a quarter disagree with this statement (25%). This is in contrast to the world-wide figures, where opinion is fairly evenly divided; 30% agree, 32% disagree.

As they do world-wide, members of the successor generation in Brazil perceive Britain to be multi-cultural, although they are marginally less likely to perceive us this way (18% disagree world-wide compared to 23% in Brazil). Brazilians also tend to view Britain as being more class-based than they do across the other countries in this study (73% vs 66%).

World-wide opinion is fairly evenly split on whether British people are racially tolerant. In Brazil, the picture is similar although the margin between those agreeing and disagreeing narrows; 34% agree that we are not racially tolerant (39% world-wide), 38% disagree (31% world-wide).

Few members in Brazil believe that women are discriminated against in Britain, less than the all country average (10% compared to 15%).

Disappointingly, Brazilians are more likely to agree that we are not welcoming towards foreigners than respondents are world-wide; 50% agree, 18% say they 'strongly' agree.

The qualitative work supports this indicating that British society is seen as unreceptive to visitors. British people are not particularly seen as rude or unwelcoming, rather they are seen as indifferent towards visitors. They are seen to be unwilling to make any special effort to welcome outsiders and treat them in a rather forced and formal fashion. It is argued that the reason for this is that attributes such as seriousness and rigidity are thought to be important and reinforce the image that the British are above all reliable. This links in with the images of British business. We are perceived to lack innovation and creativity as we work against a backdrop of reliability and stability, which few attempt to challenge.

The findings from the qualitative work also suggest that while British society is recognised as a democracy, it is seen as operating with little participation from its citizens. Two quite different pictures emerge with regard to the decision makers within British society. On the one hand, there is an image of a somewhat conservative, authoritarian person who holds much power over the community (like Margaret Thatcher). In contrast, the leader is seen by some as someone with more liberal ideas who is keen to promote change within the society (more like the image Tony Blair portrays).

British Business

In relation to the other countries measured, the United Kingdom and France are viewed as having the fewest ‘world-beating’ companies, though nevertheless, around four in five agree. They are out done by the United States (99%), Japan (97%), and Germany (93%). The same picture emerges across the other countries in this study.

The United States is viewed as the clear leader in this field; 94% ‘strongly’ agree that it has many ‘world-beating’ companies, the equivalent figure for Japan is 78% and for the United Kingdom it is a third (34%).

World-beating Companies

Q6 Please tell me the extent to which you agree or disagree that has many ‘world-beating’ companies.

	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree
	%	%	%	%	%
USA	94	5	0	1	0
Japan	78	19	2	1	0
Germany	59	33	4	2	*
France	40	40	10	7	2
UK	34	43	13	8	1

Base: All successor generation in Brazil (206)

The United Kingdom is more likely to be seen as a major financial trading centre (83%), beaten (perhaps unsurprisingly) by the United States (98%) and Japan (89%). Germany takes fourth place on 77%, and trailing behind is France with 45% in agreement. A similar pattern emerges world-wide, however, Brazilian members of the successor generation are more likely to give Germany and the United Kingdom a positive rating.

The qualitative work demonstrates that British business men and women are seen to have important personal qualities such as honesty, loyalty and trustworthiness. They are also perceived to be perfectionists and highly specialised. However, their lack of creativity and versatility within their own markets is felt to limit their ability to 'make money' and advance with the times. It was suggested that this lack of initiative is a result of the historical stability of the country; as stability is part of British culture, few individuals are prepared or encouraged to take challenges and risks within the business environment.

I think they are professionals directed to a determined profession. He (businessman) is a man with a profession, he would not be a versatile person. He is a specific professional

He will know how to improve and go deeper into it (his profession), but only this

They are perfectionists in their productivity, they have their responsibilities. Their satisfaction is to do their job well

They would not take risks if there were chances of losing it

They have a lack of creativity and daringness

British products and services are rated 'very' good by a quarter (23%); a further two-thirds say they are 'fairly' good (66%). Only one member of the successor generation in Brazil rates them as 'poor'. The 'net rating' of +89% (% good minus % poor) is in line with the all country figures.

Across the thirteen countries measured, British managers have a better reputation than the British workforce. However, in Brazil the picture is slightly different. Here the British workforce and British management are rated about the same – just over three quarters rate them 'good'. Positively only 1% rate the management as poor, and fewer say this about the workforce.

Perceptions of British Business

Q28 Thinking about your perceptions of British products and services generally, taking your answer from this card, to what extent do you think they are good or poor ?

Q29 And using the same scale, how do you perceive ...

a) the British workforce ?

b) British management ?

	Products & services	Workforce	Management
	%	%	%
Very good	23	12	14
Fairly good	66	67	63
Neither good nor poor	5	16	13
Fairly poor	*	*	1
Very poor	0	0	0
Don't know	5	5	9
Net good	89	79	76

Base: All successor generation in Brazil (206)

Indeed, one particularly strong image that emerged from the qualitative work centred around the perceived honesty of the British business man or woman; credibility was seen as a very important parameter.

British Science & Technology

In Brazil, Britain is not perceived as having a particularly strong reputation for scientific and technological innovation relative to the other countries measured. Compared to the United States - 99% agree, Japan (90%) and Germany (83%), just 65% think the same about the United Kingdom, of which 18% 'strongly' agree. The same story comes across world-wide, although Brazilians tend to be more positive in their views, particularly with reference to Germany (83% versus 76% world-wide).

In the qualitative work differences emerged between the student group and the executives. The students were more inclined to believe that due to globalisation and the exchange of technology, the area of science is fairly homogenous. On the other hand, the executive group saw the British scientist as more traditional and meticulous. They did not perceive British scientists to be leading innovators in their fields. The idealism of the British scientist, working for the well being and in the interests of the population, rather than for the financial rewards, was well respected, however.

A guy who is considered crazy because of his ideas and is always well informed

Very meticulous, a researcher, normal family, but the mind of a scientist

Scientific and Technological Innovation

Q4 Please tell me the extent to which you agree or disagree that has a strong reputation at the moment for scientific and technological innovation.

	Strongly agree	Tend to agree	Neither/ Nor	Tend to disagree	Strongly disagree
	%	%	%	%	%
Japan	69	21	6	2	0
USA	83	16	*	*	0
Germany	38	45	9	4	*
UK	18	47	22	8	4
France	14	44	15	20	5

Base: All successor generation in Brazil (206)

British Media

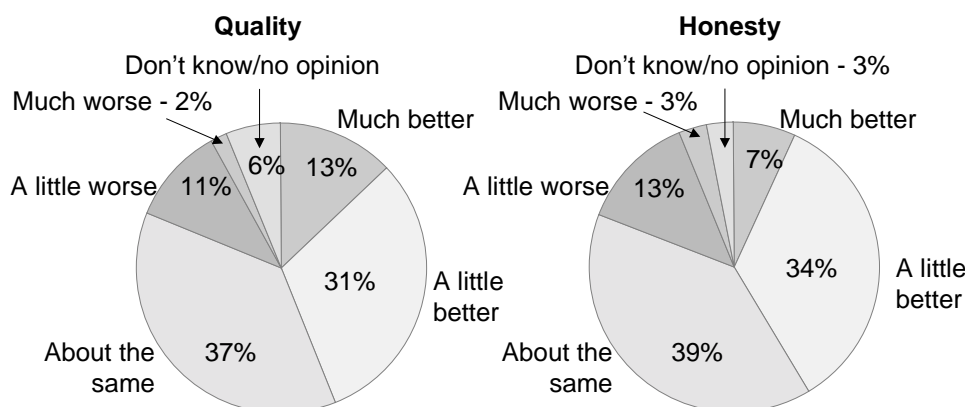
World-wide, members of the successor generation tend to believe that the British media is better than the media in their own country in terms of its honesty. In Brazil, however, this is less likely to be the case. Around a quarter world-wide say that the British media is 'much' better in terms of its honesty compared to 7% who think this in Brazil. In fact, Brazil is one of the only countries where the proportion falls below 10%; the other is Germany where no respondents say that it is 'much' better.

In further support of this, Brazilian members of the successor generation are more likely to disagree (39%) than agree (23%) that the British media tells the truth. This is almost a reverse of the picture world-wide, where more than a third agree (36%) and around one in five disagree (28%).

In terms of the media's quality, a similar picture emerges; Brazilians are less likely to give the British media a positive rating. Less than half say that it is better than the media in their own country – 44% versus 63% world-wide. Indeed, only 13% in Brazil say it is 'much' better, in contrast to around a third world-wide (31%).

British Media

Q27 Thinking about the British media, how does it compare with the media in this country, in terms of its...



Base: All successor generation in Brazil (206)

The findings of the qualitative research demonstrate that there are perceived to be two types of British newspapers - those that are tabloid style and devoted to gossip and those that are more serious in nature covering issues such as the economy and politics. The more serious type of newspaper is seen to have more credibility and can be trusted, although it is perhaps a little boring, while the tabloid style paper is thought to have limited coverage.

I think there are times when the lies prevail

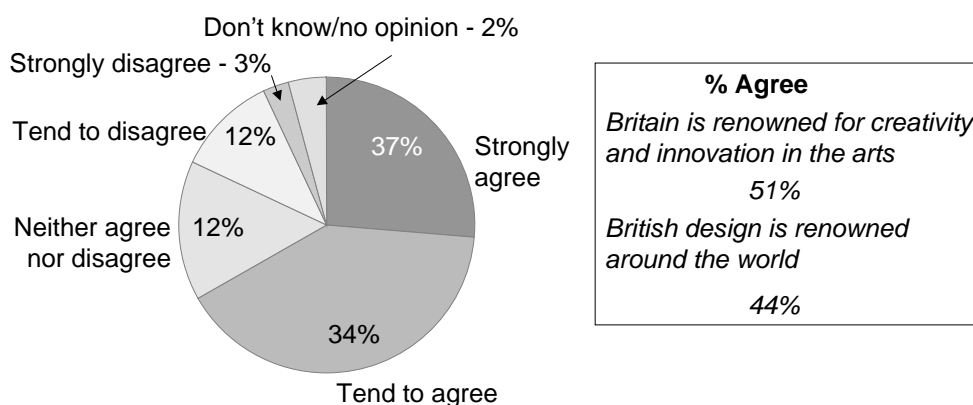
British Art

Twice as many members of the successor generation agree as disagree that Britain is renowned for creativity and innovation in the arts (51% vs 26%). Overall, one in five 'strongly' agree (19%) compared to one in twenty who 'strongly' disagree (5%). This is much in line with the all country results.

Brazilians members of the successor generation are more likely to disagree that British design is renowned around the world, relative to the world-wide figures. Across all the countries in the study, one in five feel that British design is not renowned around the world, compared to a third who feel the same in Brazil – 32%. However, around a quarter say they ‘strongly’ agree that it is renowned (23%) in contrast to 16% who say the same world-wide.

British Arts: Modern vs Traditional ?

Q19 To what extent do you agree or disagree that Britain’s reputation in the arts is based more in the past than the present ?



Base: All successor generation in Brazil (206)

World-wide, Britain’s reputation in the Arts is perceived as being based more in the past than the present; in Brazil the story is no different - 71% agree compared with 15% who disagree.

The qualitative research bears testament to the lack of awareness of British art, with limited discussions surrounding the issue of British art.

We have little contact with Europe; it is difficult to imagine what they are like

The images that do emerge are connected with literature. The typical artist is perceived as intellectual and philosophical but not particularly charismatic. Shakespeare was mentioned, as was Agatha Christie. Interestingly, Sherlock Homes was felt to be a ‘artist’ rather than a fictional character.

In further support of the lack of awareness of Britain's artistic exports, the majority are unable to name any contemporary British artists (66%). This is similar to the world-wide average of 60%. Film star Hugh Grant, who is often portrayed in British films as epitomising the English Gentleman, is the most frequently mentioned (14%); this is in contrast to the all country average of 5%. Sean Connery follows on 8%, then Elton John on 5%. Other artists fail to achieve more than 4% recognition.

Leading British Artists (Spontaneous)

Q20 Can you tell me the names of one or two contemporary British artists ?

Top mentions:	%
Hugh Grant	14
Sean Connery	8
Elton John	5
Emma Thomson	4
Paul McCartney	4
Anthony Hopkins	3
Rolling Stones/Mick Jagger	2
Kate Winslet	2
Spice Girls	2
Don't know	66

All other answers 1% or less

Base: All successor generation in Brazil (206)

In terms of leading British pop musicians, levels of recognition are higher; only a quarter are unable to name any artists (23%), which is in fact lower than the world-wide figure of 39%. Elton John is mentioned again by a quarter (24%), also popular are the Rolling Stones and Mick Jagger, and Paul McCartney and the Beatles. Indeed, all these artists record some of the highest levels of recognition in Brazil compared to the all country averages.

Leading British Pop Musicians (Spontaneous)

Q21 Can you tell me the names of one or two contemporary British pop musicians ?

Top Mentions:	%
Elton John	24
Rolling Stones/Mick Jagger	20
Paul McCartney	15
The Beatles	14
Spice Girls	12
U2/Bono	10
Oasis/Liam or Noel Gallagher	9
John Lennon	4
Sting	4
David Bowie	3
George Michael	2
Phil Collins	2
Queen/Freddy Mercury	2
Don't know	23

All other answers 1% or less

Base: All Brazilian successor generation (206)

It is encouraging that in Brazil all the artists and pop musicians are in fact British bar one, Robin Williams (mentioned by only 1%), and although several popular bands which are mentioned are perhaps not contemporary, many of the big names of recent years do get a mention. Thus, it seems that British stars are getting the necessary coverage overseas and the resultant recognition.

British Personalities

Respondents were asked to tell us which, if any, of a list of British 'celebrities' they had heard of, which they thought were British, and which would be a positive role model for them personally.

The Spice Girls are the most recognised British ‘celebrity’ among the successor generation in Brazil - 98%. Indeed, this is above the all country average and along with Germany is the highest scores the Spice Girls receive out of all the countries in this study. They are followed by Robin Williams (the only American on the list) with a recognition score of 97%, which is also well above the all country average of 67% and is the highest score of the thirteen countries measured. Naomi Campbell (93%), Tony Blair (92%) and Hugh Grant (85%) follow, all achieving scores above the world-wide averages. Someway behind them are Kate Winslet, Stephen Hawking and John Galliano.

Well-known Britons

Q22a Which, if any, of these people have you heard of ?

Q22b Which, if any, were you aware were British ?

	Heard of	British	Proportion recognised as British
	%	%	%
Spice Girls	98	69	71
Robin Williams	97	17	17
Naomi Campbell	93	22	24
Tony Blair	92	83	91
Hugh Grant	85	68	80
Kate Winslet	59	37	64
Stephen Hawking	57	18	31
John Galliano	41	8	21
Liam Gallagher	32	16	50
Vivienne Westwood	31	16	50
Rowan Atkinson	26	18	69
Richard Branson	26	8	31
Linford Christie	25	12	46
Stephen Shaw	23	5	24
David Hockney	19	5	26
Tim Henman	16	7	48
James Dyson	15	3	24
Anita Roddick	14	1	11
William Hague	9	1	17
P D James	9	2	28
Damien Hirst	7	1	20
Delia Smith	4	*	11
None of these	*	0	-
Don't know	0	3	-

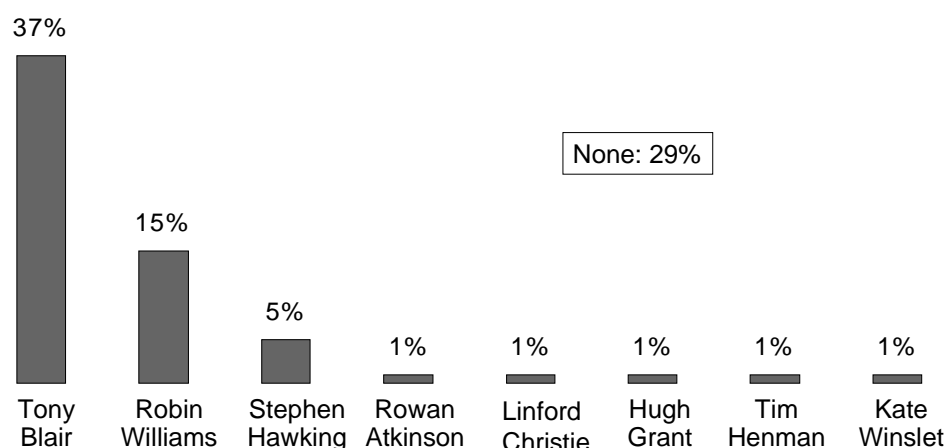
Base: All successor generation in Brazil (206)

Tony Blair beats the Spice Girls to become the celebrity who people are most likely to be aware is British; in fact, nearly all those who have heard of him are aware that he is British. The Spice Girls receive a score similar to Hugh Grant (68% and 69% respectively). However, a higher proportion of those who have heard of Hugh Grant know he is British, although fewer have heard of him in the first place. Lagging behind in terms of being recognised as British are Kate Winslet and Naomi Campbell. Encouragingly, only 17% of those who have heard of Robin Williams say that he is British.

Tony Blair also emerges as the most likely role model for people, nominated by over a third of Brazilians (37%). The all country average is 21%, and indeed Brazil records the highest score out of the 12 other countries measured. Robin Williams on 15% is the only other 'celebrity' to achieve a significant proportion of the vote, although he is not British. Three in ten members of the successor generation say that none of these people would be a suitable role model for them personally (29%).

Role Models

Q22c Which, if any, of the people on this card represents the most positive role model for you personally? (Top answers)



Base: All successor generation in Brazil (206)

It should be noted that a red herring was inserted into the list – Stephen Shaw from the British Council in the UK. Stephen was recognised by 23% in Brazil (in line with world-wide results), with 5% saying he is British. There are two possible explanations for this. It may be that people were thinking of another British person with a similar name (George Bernard Shaw) or it could be a case of over-claiming – a respondent pretending that they know someone just because they feel they ought to. In this case, it is more likely to be the first explanation as Stephen achieved similar levels of recognition than other genuine British 'celebrities' such as Richard Branson and Linford Christie. There is no obvious reason why someone might make up knowledge of Stephen Shaw but admit that they have never heard of David Hockney or William Hague.

Britain's Relationships with other Countries

World-wide Britain is perceived as valuing its relationship with the United States rather more than either Europe or the Commonwealth. In Brazil, however, little difference is perceived between these relationships, indeed there are all perceived to be important. On balance, the relationship with Europe is perceived to be valued the most; 95% say it is valued 'very much' or 'a fair amount' - two-thirds say that it values it 'very much' (66%). Nine in ten feel that the relationship with the Commonwealth (93%) and the USA (91%) is valued highly, with 69% and 64% respectively saying it is valued 'very much'.

As with the all country average, the relationship between Brazil and Britain is not thought to be valued as highly as any of the above relationships, although it is still perceived to be important. Two-thirds say that it is valued 'very much' or 'a fair amount', compared to one-third who feel it is not valued.

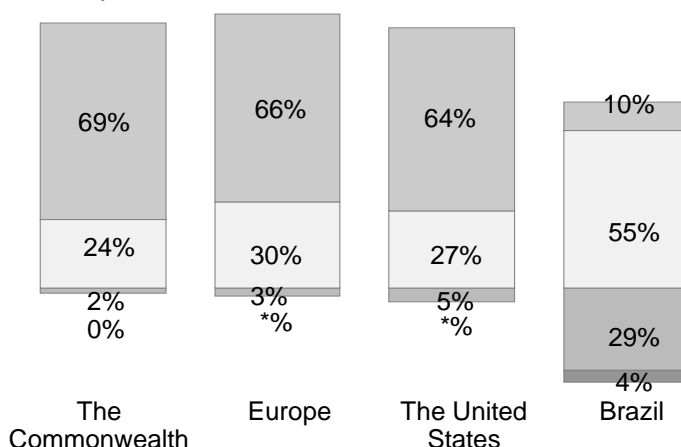
They are entirely submissive to the Americans

I think they still think they own the world. In spite of the years, England still thinks it is king of the world

Relationships Between Countries

Q25 To what extent do you think Britain values its relationships with...

Very much A fair amount Not a lot Not at all



Base: All successor generation in Brazil (206)

The findings of the qualitative work support the above findings and show that while all the above relationships are valued by Britain, it is thought that matters in Europe have taken on the greatest importance to us as a result of our proximity to Europe and the potential force of our currency. Despite some evidence that Britain is seen to follow the United States in international affairs, we are now perceived to be less involved in matters which affect other countries around the world and have become more focused on the issues which impact on our own interests.

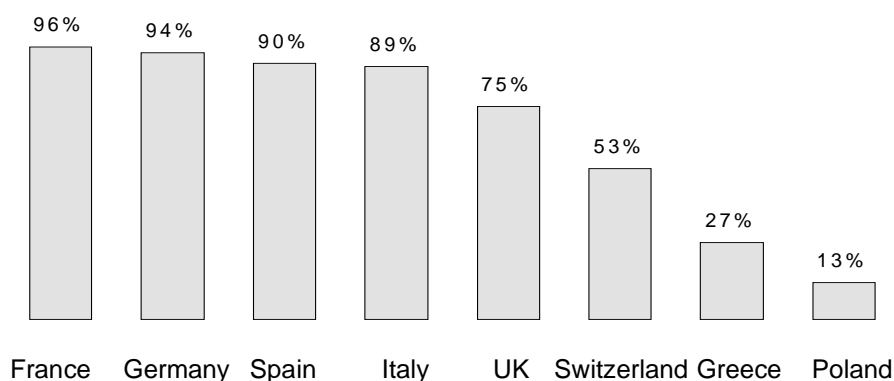
The European Union

As can be seen from the table below France, Germany, Spain and Italy are all recognised as members of the European Union above the United Kingdom. A similar pattern emerges world-wide with France, Germany, and Italy all more likely to be recognised as members than the United Kingdom. Perhaps it is not surprising, in the case of Brazil, that Spain is also recognised above the United Kingdom.

Brazilians are also more likely to think that Switzerland is part of the European Union than is true world-wide (53% vs the all country average of 44%). They are less likely than the all country average to think that Greece is a member (27% versus 51% world-wide).

Membership of the European Union

Q11 I'd like you to tell me which, if any, of the countries on this card are part of the European Union.



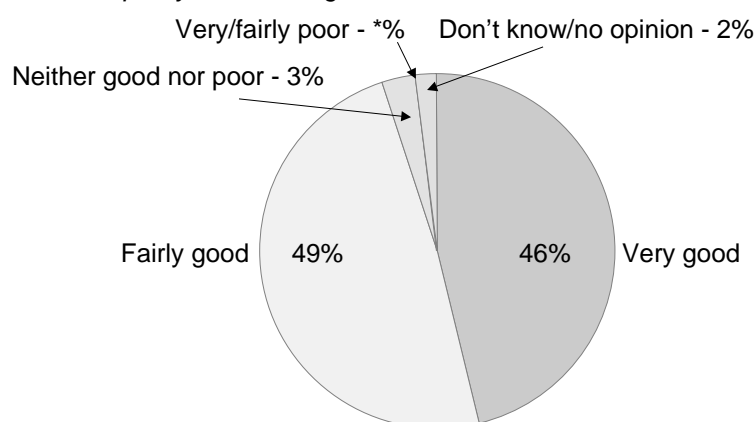
Base: All successor generation in Brazil (206)

Education

The majority of the successor generation in Brazil rate British higher education as good (94%); indeed around half say it is 'very' good (46%). This is one of the highest ratings world-wide, alongside Malaysia, and behind only Saudi Arabia, Mexico, and Egypt. Less than half of one per cent view it as poor.

Quality of British Education

Q23 Which of the answers on this card best fits how you would describe the overall quality of British higher education ?



Base: All successor generation in Brazil (206)

Perhaps unsurprisingly then, the British themselves are seen as well educated – more than a third say we are ‘very’ well educated (39%), and half say we are ‘fairly’ well educated (50%). Once again, this is one of the highest scores world-wide; Brazil comes in joint second place alongside Egypt and India, behind Saudi Arabia.

Level of Education in Britain

Q24 And thinking about the British themselves, how well or poorly educated do you think that they are generally?

		World-wide
	%	%
Very well educated	39	23
Fairly well educated	50	53
Neither well nor poorly	7	17
Fairly poorly educated	*	4
Very poorly educated	*	1
Don't know	3	3

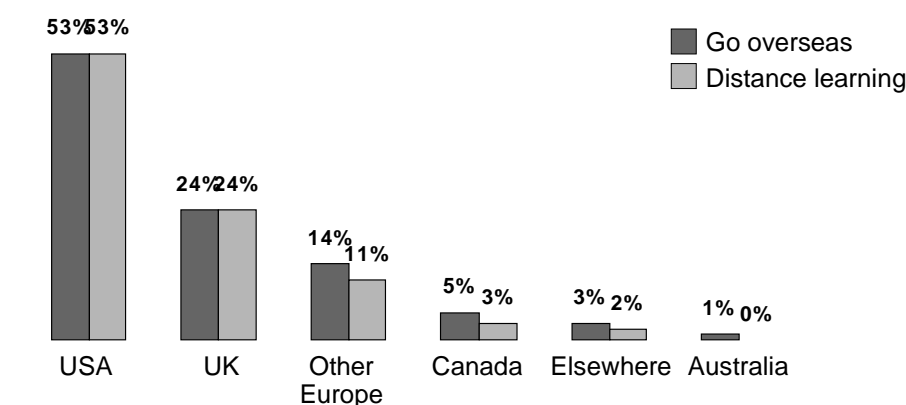
Base: All successor generation in Brazil (206)

Despite these positive ratings, the United States is the country where most members of the successor generation would prefer to study – twice as many as those who would choose the United Kingdom (53% compared to 24%). This is, perhaps, not surprising given the relative proximity to the United States in comparison to the United Kingdom, although the same picture does emerge world-wide. Other European countries are nominated by 14% and Canada by 5% Japan and Australia receive no nominations.

Thinking about which country's courses people would prefer if they stayed at home to study, the proportions opting for the United States remains the same, despite the margin between the United States and the United Kingdom narrowing world-wide.

Preferred Countries for Education (Spontaneous)

Q7 Now I'd like you to think about education. If you personally were considering going overseas to any country at all to study, which one country do you think you would prefer to go to ?
And if you were considering a distance learning course, where you would remain in your own country, which country's courses do you think you would prefer ?



Base: All successor generation in Brazil (206)

These findings would appear to back up the qualitative research, which found that while British teachers are felt to quality education and teach students the rules of politeness and responsibility, they fail to engage students. The perception is that classes would be tiresome, tedious and lacking the human touch which allows relationships to develop between teachers and students. In comparison, the American teachers are seen as more interactive with their students, making classes more relaxing. They are also perceived to be dedicated to research, resulting in a broader knowledge of their subject area, which in turn leads to a higher quality of teaching and increased opportunities for teachers to help their students into the job market.

The best professional, he is the best in quality and knowledge

In England the tradition is so strong that even if the teacher wants to be more accessible, he won't allow it because people may get the wrong idea about him

He never misses classes, says good morning good afternoon and good evening He delivers the class, says good evening leaves, without having much intimacy with the students

The United States is very much seen as providing qualifications which would have the most credibility with potential employers (74%). The United Kingdom is the only other country to achieve a relatively significant proportion of the nominations, although it is substantially less than those opting for the United States (13%). Indeed, Britain fares relatively poorly in this area compared to the all country figures, where the margin between the two countries is less distinct (58% choosing the United States, 23% the United Kingdom).

Credible Qualifications

Q8 Thinking specifically about educational qualifications, a qualification from which one of these countries do you think would have the most credibility with potential employers ?

		World-wide
	%	%
USA	74	58
UK	13	23
Home country	1	6
Japan	5	5
Canada	4	3
Australia	1	2
Don't know	*	3

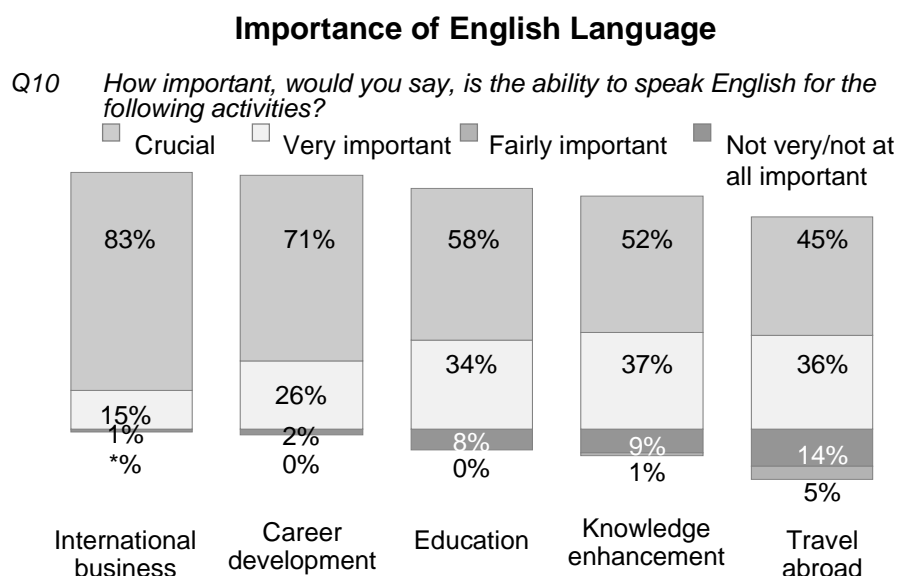
Base: All successor generation in Brazil (206)

Languages & the English Language

English is the most widely-spoken language in Brazil - 90% - as it is world-wide, followed by Spanish - 43%. Relatively fewer speak French (17%) and German (9%), indeed fewer than is the case world-wide. The equivalent figures world-wide are 21% and 22% respectively.

French is the language which Brazilians respondents would most like to speak – 51%, closely followed by Spanish for those who do not do so already – 46%, and then German – 34%.

On balance, Brazilian members of the successor generation perceive the ability to speak as English as particularly 'crucial' for international business (83%) and career development (71%). This is in contrast to the all country figures where although international business is viewed in a similar light, the use of English for career development is relatively less important.



Base: All successor generation in Brazil (206)

Sources of Information about Countries

Amongst members of the Brazilian successor generation a variety of sources are used to find out about other countries. The most popular are national media (54%), local press (45%) and international press (41%). The one most influential source remains Brazilian media (26%).

Thinking specifically about the United Kingdom, local press, national TV news and visiting the United Kingdom personally are all nominated by around a quarter. The British Press is nominated by two in five (18%), the BBC World TV and the BBC World Service do not fare as well, mentioned by 13% and 6% respectively, similar proportions to the all country results. Notably, in Brazil around two in five feel the Internet is an important source. This is in contrast to the world-wide figures where it is nominated by only 4%. Indeed, Turkey is the only other country where the Internet is mentioned by 10% or more.

Sources of Information

Q1a **What sources of information are most important to you when you form an opinion about a country ?**

Q1b **And which is the one most influential source ?**

Q32 **Please tell me which two or three sources of information are most important when forming an opinion specifically about the United Kingdom.**

Media (press, TV, radio) from that country	54	26	n/a
Local press	45	10	29
International press	41	8	14
People who have visited that country/the UK	36	6	22
Visiting the country/the UK personally	35	17	25
Local TV news	33	8	25
International TV	29	5	19
Know people from that country/the UK	23	5	13
Books	18	3	17
Internet	16	8	18
Films	13	*	12
Other official (UK) sources from that country	11	*	0
Local radio	7	0	0
Word of mouth – friends & family	6	*	2
Other local TV	5	*	0
Word of mouth - work colleagues	5	0	2
Tourist authorities from that country/in the UK	3	0	1
International radio	1	0	0
Embassies & Consulates	1	0	1
British press	n/a	n/a	18
BBC World TV	n/a	n/a	13
BBC World Service	n/a	n/a	6
Other	9	1	36
Don't know	0	*	1

Base: All successor generation in Brazil (206)

A third have visited the United Kingdom once. Most (67%) however have never visited our country.

Implications

Britain's Strengths and Weaknesses

Notably, Brazil is the only country in this study where less than half a per cent say that our tradition and conservatism is a major weakness. World-wide, there is no doubt that these particular aspects of our society are seen as a double-edged sword which may hold back our development in areas such as education and business.

British Society

Our national health service, our legal system and our commitment to protecting the environment are all seen as very positive aspects of our society. Although Britain is seen as without discrimination to women and multi-cultural, it is viewed very much as a class based society and opinion is divided on whether we are actually racially tolerant.

The British people themselves are not seen as particularly welcoming, in fact this is frequently mentioned as one of Britain's weaknesses by members of the successor generation in Brazil. As a nation, we are not perceived to be rude, as such, more unenthusiastic about visitors. It is thought that we almost begrudge visitors a friendly welcome.

Overall as a society we are felt to be traditional rather than modern.

British Business

Britain does have a positive image with respect to business, although in Brazil as with other countries, particular aspects are highlighted as limiting our potential to grow and develop in this area.

Important personal qualities of businessmen and women, such as honesty and loyalty, are linked to the British. However, it is our lack of innovation and creativity that brings our reputation down. In Brazil, it is thought to be a direct result of our history; as businesses work against a backdrop of stability, change and risk taking are not encouraged.

Our products and services are seen as one of our strengths in the business environment. Our managers and workforce also enjoy an excellent reputation in Brazil.

Despite all this, we do still lag behind the USA and Japan in terms of being seen as a major financial trading centre. France and Germany join the United States and Japan, to relegate us to fifth position in terms of having many 'world-beating' companies, though France is only marginally ahead of the UK in this respect.

British Art

British art achieves a relative low profile in Brazil; Brazilians are more likely to be able name British pop musicians, than British artists.

Overall, Brazil perceptions of British art are relatively more negative than they are world-wide and, like worldwide, its reputation is felt to be based more on the past than the present.

British Education

British education is rated particularly highly in Brazil and the British people are perceived to be well educated themselves, receiving one of the highest ratings world-wide.

However, the UK is beaten by the United States in terms of where and whose courses members of the successor generation would like to study. The view of British educationalists is likely to have some impact on this. They are seen as offering a high quality education, but with little interaction with their pupils, resulting in rather formal and tedious lessons.

The ability to speak English is perceived to be a definite strength in many environments, such as business, career development and education.

How to communicate with the Brazilian successor generation

Visiting the UK personally or talking to people who have, along with the local media, are key sources of information about the United Kingdom. The Internet is also an important source for Brazilians. It would be a crucial source to exploit as the Internet is linked with innovation and creativity images which are currently perceived to be lacking in the United Kingdom. The British media does not enjoy its most positive ratings in Brazil, so perhaps it is necessary to enhance this image, as media is said to be a valuable source of information.

In terms of potential role models to communicate these messages, Tony Blair stands out, seen as a modern leader who is prepared to instigate change in British society.

MORI/ 11927

*Janette Henderson
Andy Martin
Fabienne Obadia
Kirsten McLoughlin*

Appendices

Topic Guide

Introduction

Name, job etc.

Communities

What I want to do this evening is to explore your perceptions and feelings about three different countries. To do this we're going to play a game - it might sound a bit odd but bear with me. The reason for this approach is that we need to focus on general characteristics about the countries and the people who live there, without getting drawn into discussions such as 'oh when I was in such and such a place.....'.

In the game we are going to pretend that there are three communities, and each one represents one of three countries - The United States, Great Britain, and (INSERT COUNTRY NAME HERE). Each of the three communities is meant to encompass EVERYTHING about that country to you.

So to start us off, I'd like you to tell me about the building in which the American community might live. What would that building be like ? *PROMPT IF NECESSARY: Is it big or small ? Smart or dirty ? What is the decor like ? What about a garden ?*

Why do you think that ?

What are the best things about this building ?

(What do you base your impressions on ?)

Now what about the building which represents Great Britain - what does it look like, and how is it different to the American building ?

Do these differences make it a better or worse place to live ?

And what about the building which represents INSERT COUNTRY NAME ?

Thinking now about the people who live in each of the communities - what are the people like ? For example, if you were to visit the British community, how would the people welcome you ? Why do you think that ? And what would the welcome be like in the INSERT COUNTRY NAME community? And in the American community ?

Now I'd like you to think about some specific individuals who might live in the three communities. Firstly, imagine that there is a person living in each community who represents **higher education**. When you think of the person who represents British higher education, what sort of person do you think of ? *(PROMPT IF NECESSARY: male or female ? young or old ? traditional or modern ?)*

What kind of educational establishment do they teach at ?

What kind of teacher are they ? What is their teaching style ?

What are that person's good and bad points ?

What about an American who represents education - what sort of person do you think of? What kind of teacher are they? What kind of educational establishment do they teach at?

And the educationalist in the INSERT COUNTRY NAME community. What are they like?

Overall, who would you choose to be your 'teacher'? Why?

What are the best points about the educationalist in each country?

And what are their worst points?

Moving on now to another character in the communities. I'd like to get your impression of the Arts in each of the three countries. So please try to imagine a character in each community who represents **Art** (not necessarily someone who paints). When you think of someone in the INSERT COUNTRY NAME community, what kind of artist would they be?

What about the person in the American community - what kind of art would they produce?

And the British person who represents the Arts?

Thinking about the British 'artist', describe that person to me.

What is the quality of their work?

How well regarded do you think that person is in their own community, and elsewhere?

What are that person's major strengths?

Which of the three 'artists' would you most admire? And why?

I'd like to think now about the **person in charge** of the community, and how they run the community. How do you think the British community is run? How involved are the community occupants in the **decision-making**? Is it a good way to run a community? And what is the person in charge like? (Please try not just to describe your impression of the current British Prime Minister - it's a general picture of a typical British leader I am looking for. (*Unless Tony Blair encapsulates British leadership - in which case, why?*)) Overall, what are the best points about the running of the community?

How do these issues differ in the INSERT COUNTRY NAME community: the running of the community and the person in charge? In what ways is this community different to the British community?

And what is the running of the American community like?

To what extent do you think the occupants of these communities would take an interest in what is going on elsewhere? How much is the American community, for example, involved in affairs which affect the other communities? Are they getting more or less involved in such affairs? And how much do people in the other communities listen to what the American community has to say? How is the British community different?

Now I'd like to move on to thinking about businesses in each of the three countries, so continuing to use the house analogy, I'd like you to think about typical **business-people** who might live in each of those communities. How would you describe the British business-person?

Is he/she a good manager? What makes them good or bad?

How does the British businessman differ from the others?

What kind of **business** is it that the business-people work for ? First, the business in INSERT COUNTRY NAME (*PROMPT IF NECESSARY: services or manufacturing ? what does it produce ? big or small ? socially responsible or cut-throat ? efficient ?*)

Is it successful at what it does? Where does it sell its products/services - in the community or elsewhere (more to the American or British community ?) Describe its management and **workers**. What are the particular strengths of the business ?

What about the American business - what does it do ? How are the American business's workers and managers different to their INSERT COUNTRY NAME counterparts ? Where does it sell its products ? In what ways are the American business's products/services better or worse than those produced by the INSERT COUNTRY NAME business ?

And how does the business run in the British community differ from the other two ?

Imagine now that each community produces a **newspaper**. Describe the newspaper in the community representing Britain. What does it look like ? What kind of coverage does it have ? Is it well-read ? Do you believe its contents ? What is the best thing about the paper ?

What about the American newspaper - how is that different ?

And the INSERT COUNTRY NAME paper - what is that like ? Do the people in the community read it and like it, do you think ? What are the paper's qualities ?

Which of the papers would you prefer to read ? Why ?

And finally, there is someone who represents **science and technology** living in each community. What would the British scientist be like? What kind of things would he/she work on ? And what kind of working habits would they have ? What is the best thing about the British scientist ? And the worst ?

How does that compare with the American scientist ?

And the INSERT COUNTRY NAME scientist?

Overall impressions

Could you describe in three words each of the communities ?

Would you live in the British community? Why/Why not?

And now thinking about your ideal community - how would you describe that in three words ?

Britain

To conclude, now, I'd like to focus for a short while specifically on Great Britain, and how you have come to have the impressions that we have just been discussing.

Have you ever travelled to Britain? (IF NOT, ASK Why not?) What was the purpose of your visit? How else have you found out about Britain ?

You said that the British:

educationalist, artist, person in charge, newspaper, business-person, scientist

... would be like What has made you think of someone/something like that ?

Overall, have your experiences of Britain been positive/negative?

Questionnaire

Statistical Reliability

The sample tolerances that apply to the percentage results in this report are given in the table below. This table shows the possible variation that might be anticipated because a sample, rather than the entire population, was interviewed. As indicated, sampling tolerances vary with the size of the sample and the size of the percentage results.

For example, on a question where 50% of the people in a weighted sample of 206 respond with a particular answer, the chances are 95 in 100 that this result would not vary more than seven percentage points, plus or minus, from a complete coverage of the entire population using the same procedures.

Approximate sampling tolerances applicable to percentages at or near these levels			
Size of sample on which survey result is based	10% or 90% ±	30% or 70% ±	50% ±
3,000	1.1	1.6	1.8
1,000	1.9	2.8	3.1
206	4.1	6.3	6.8

Tolerances are also involved in the comparison of results from different parts of the sample. A difference, in other words, must be of at least a certain size to be considered statistically significant. The following table is a guide to the sampling tolerances applicable to comparisons.

Differences required for significance at or near these percentage levels*			
Size of the samples compared	10% or 90% ±	30% or 70% ±	50% ±
100 vs 100	8.3	12.7	13.9
150 vs 50	9.6	14.7	16.0

Interviewing Locations and Quotas

The following table shows the locations where the quantitative interviewing took place, how many interviews were achieved in each country, and the age and gender quotas which were set. In some countries, additional quotas were set on educational qualifications, work status, work sector, income (Russia only) and ethnic background (South Africa only).

COUNTRY	CITIES	AGE	GENDER
Brazil	Sao Paulo: 38%	24-29: 50%	M: 50%
	Recife: 15%	30-35: 50%	F: 50%
	Curitiba: 15%		
	Rio: 25%		
	Brasilia: 8%		
China	Beijing: 100%	22-28: 50%	M: 50%
		29-35: 50%	F: 50%
Egypt	Cairo: 100%	22-28: 50%	M: 75%
		29-35: 50%	F: 25%
France	Paris: 100%	20-24: 15%	M: 60%
		25-29: 40%	F: 40%
		30-35: 40%	
Germany	Berlin: 100%	22-29: 50%	M: 50%
		30-35: 50%	F: 50%
India*	New Delhi: 50%	22-25: 60%	M: 80%
		26-29: 20%	F: 20%
		30-35: 20%	
Malaysia	Petaling Jaya: 50%	22-28: 50%	M: 60%
	Kuala Lumpur: 50%	29-35: 50%	F: 40%
Mexico	Mexico City: 100%	25-35: 80%	M: 50%
		35-45: 20%	F: 50%
Poland	Warsaw: 25%	20-30: 50%	M: 50%
	Krakow: 25%	31-40: 50%	F: 50%
	Poznan: 25%		
	Gdansk: 25%		
Russia*	St Petersburg: 25%	20-27: 33%	M: 50%
	Moscow: 25%	28-34: 33%	F: 50%
	Ekaterinburg: 25%	35-40: 33%	
	Samara: 25%		
Saudi Arabia	Jedah: 40%	25-29: 40%	M: 70%
	Riyadh: 40%	30-35: 30%	F: 30%
	Dammam: 20%	36-40: 30%	
South Africa	Durban: 25%	20-24: 33%	M: 50%
	Capetown: 25%	25-29: 33%	F: 50%
	Johannesburg: 25%	30-34: 33%	
	Pretoria: 25%		
Turkey	Istanbul: 33%	22-29: 40%	M: 60%
	Ankara: 33%	30-35: 60%	F: 40%
	Izmir: 33%		

* 300 interviews completed in India, and 400 interviews in Russia