

Attitudes Towards Britain and the British

China

**Research Study Conducted for
The British Council**

May – July 1999

Contents

Preface	1
Summary of Findings	4
Familiarity and Favourability with Key Countries	4
Images of the United Kingdom	6
Britain's Strengths & Weaknesses	8
British Society	9
British Business	12
British Science & Technology	15
British Media	16
British Art	18
British Personalities	20
Britain's Relationships with other Countries	22
Education	24
Languages & the English Language	27
Sources of Information about Countries	28
Implications	30
Appendices	
Topic Guide	1
Questionnaire	
Statistical Reliability	
Interviewing Locations and Quotas	

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 China. 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 overreaching 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	India	Russia
China	Malaysia	Saudi Arabia
Egypt	Mexico	South Africa
France	Poland	Turkey
Germany		

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 China, the definition used was:

- Education - university or above
- Income: over average (except those who are still at universities)
- Current status - working at the major companies, government departments, universities or other major organisations; or studying for master or doctor degrees in universities

Methodology

The survey was conducted in two distinct phases, beginning with two **qualitative focus group discussions**. The groups were held in Beijing on 3rd May 1999. Again, the decision as to use this city was taken in consultation with MORI's local partners and the British Council office in China. Both groups were moderated by an experienced researcher with one of MORI's research partners in the country concerned.

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 partners 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. This was undertaken among 200 members of the same target audience in each country. Interviewing was conducted face-to-face in Beijing, between 3-22 July 1999. Quotas were set to ensure that a reasonable cross-section of members of the successor generation were interviewed.

Report Layout

This report will concentrate on the overall world-wide results, and compare them to those recorded in China. 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

As in other countries surveyed, the United States is the country most likely to be known 'very well' (15%) or a 'fair amount' (60%) by the successor generation in China. Given its geographical proximity, it is not surprising to find that Japan ranks second, with over half (55%) saying they know a 'fair amount' about it. A smaller proportion (six per cent) say they know Japan 'very well.'

The three European countries measured are not as well known, but of these, the United Kingdom is significantly better known. Less than one in five (18%) know France and Germany 'very well' or a 'fair amount'. In comparison, more than one in three (37%) say they know at least a fair amount about the UK. However over half (56%) say they know 'just a little' about the UK. These results are in contrast to the world-wide figures where the United Kingdom emerges in second place, above France and Germany with Japan trailing in fifth place.

Although France is less well known amongst those measured, it achieves the highest favourability rating. Four in five (82%) say they are 'very/mainly' favourable, with only two per cent expressing an unfavourable opinion. The United States comes second in the favourability ratings, with three in five (61%) being 'very' or 'mainly' favourable. This is significantly less than in the survey overall, where the United States achieves the highest 'very favourable' score (29%). The difference may partly be due to negative press coverage following the bombing of the Chinese embassy in Kosovo.

Half of all respondents in China view the United Kingdom favourably, which is significantly less than the world-wide average of 71%. Again, this may be in part due to negative feelings aroused following the bombing of the Chinese embassy. In the group discussions (which took place before the bombing), thirteen out of sixteen said that they had a positive view of the UK.

One in four (26%) regard the UK unfavourably. The comparable all-country figure is eight per cent. Students (41%) are more likely than professionals (21%) to be negative towards the UK. This may reflect the fact that students led the protests against the American and British embassies following the bombing in Kosovo. One in four are neutral about the UK.

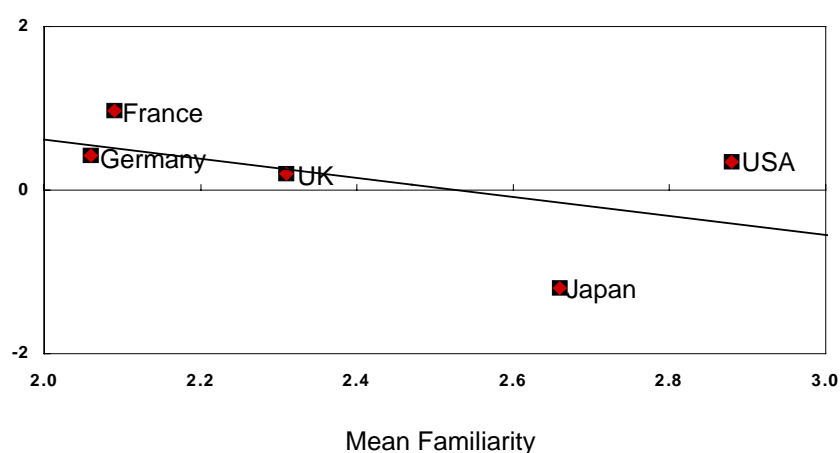
Germany is regarded in a similar light to the UK, with 55% saying that they are favourable towards it. Twenty-six per cent are neutral and 18% are unfavourable.

As might perhaps be expected, Japan scores the highest unfavourable score – 83%, of whom 41% describe themselves as ‘very’ unfavourable.

The chart below shows, along the bottom axis, how well people feel they know each of the five countries – the further to the right a country is placed, the better people feel they know it. On the side axis is overall favourability towards each country. The diagonal is known as the ‘line of best fit’. It shows the mid point of all the countries measured. If there were an exact linear relationship between these two variables, all the plotted points would lie on a straight line. This almost never happens with real data, but a line can be calculated which comes closer to the plotted points than any other.

Familiarity & Favourability Towards Countries

Mean Favourability



Base: All Chinese successor generation (200)

* 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’

Images of the United Kingdom

Members of the successor generation in China show greater awareness of which countries make up the United Kingdom than the sample as a whole. England is the most commonly recognised nation, mentioned by 92%. Scotland (87%) and Northern Ireland (84%) follow closely behind. All three figures are significantly higher than the all country average. In contrast, Wales is recognised by 65%, the same proportion as world-wide. Just eight per cent think the United Kingdom is the same as Great Britain.

The Chinese perception of **Scotland** is a traditional one. Mirroring the all country average, the kilt is the most widely recognised image, spontaneously mentioned by 42%. Women are more likely than men (53% versus 32%) to mention this. The second most frequently nominated symbol, albeit some way behind, is bagpipes (13%). Other popular images are the film Braveheart (10%) and whisky (9%). Men are more likely than women to mention Braveheart (17% versus 3%).

Arguably, the successor generation in China has a more positive image of **Northern Ireland** than those in other countries. Although violence and civil war are mentioned by one in five (21%), the peace process (33%) achieves the most mentions. In contrast, the all country average for the peace process is nine per cent. Scenery is the only other image nominated by a significant proportion. One in eight (13%) have no image of Northern Ireland at all, which is a similar proportion to the world-wide figures.

For almost half of those questioned (46%), **Wales** fails to summon up any image at all. This is substantially higher than the world-wide figure of 25%, and is the highest score across all the countries included in this study. Of those who are able to think of an image, castles are nominated by 10%, and six per cent mention the Prince of Wales or Prince Charles.

In contrast to the world-wide results, football is the dominant symbol of **England** amongst the successor generation in China, with a quarter (24%) mentioning it. This may be partly attributable to television coverage of the Premier League, and the fact that Crystal Palace signed two Chinese players. Men (34%) and those aged between 22-28 (29%) are more likely to nominate football than women and the older age group. More traditional images such as the Royal Family (17%), the Tower of London (9%) and the Houses of Parliament (8%) rank behind football.

Images of UK Countries (Spontaneous)

Q14-17 **What one image best sums up to you ?**
(Top answers)

Scotland	%	Northern Ireland	%
Kilts	42	Peace Process	33
Bagpipes	13	Violence	21
Braveheart	10	Scenery	11
Whisky	9	Religion	3
Highlands/mountains	4	IRA/Sinn Fein	3
Cold/wet weather	3	Cold & rainy weather	2
Highland games/tossing the caber	2	Guinness	2
Nothing/don't know	7	Nothing/don't know	13
England	%	wales	%
Football	24	Castles	10
The Royal Family	17	Prince of Wales	6
Tower of London/Beefeaters	9	Rugby	4
Houses of Parliament/Big Ben	8	Mountains	4
Rain/grey/bad weather	4	Cardiff	3
Colleges (Oxford/Cambridge)	4	Sheep	3
A country pub	4	Coal mining	2
Margaret Thatcher	3	The Valleys	2
Powerful economy	3	Daffodils	2
London	2	Football	2
Arrogant people	2		
Nothing/don't know	2	Nothing/don't know	46

All other answers 1% or less

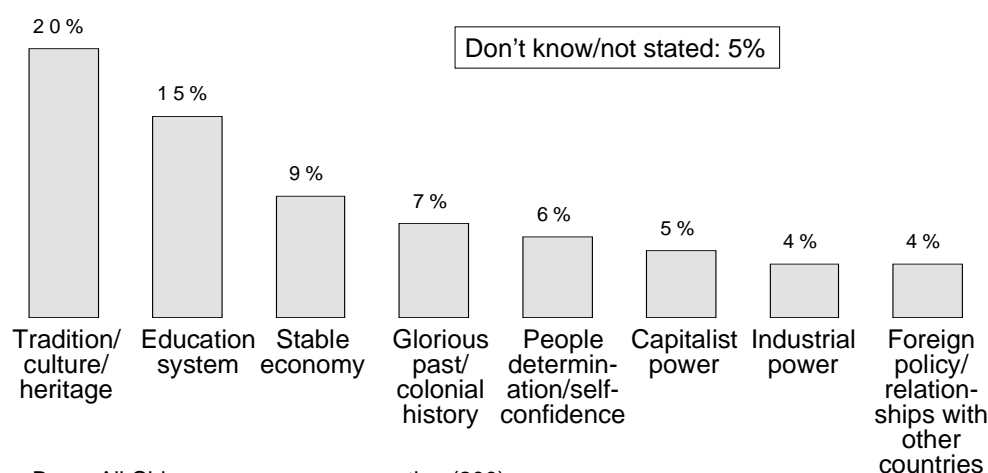
Base: All Chinese successor generation (200)

Britain's Strengths and Weaknesses

Tradition/culture/cultural heritage is identified by one in five (20%) as the UK's one major strength. This ranks top of all strengths mentioned, which is in line with the world-wide findings. The education system is ranked second, nominated by 15%. This is followed by the economy, and the UK's past/colonial history.

The United Kingdom's Major Strengths (Spontaneous)

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



Base: All Chinese successor generation (200)

Great Britain has good traditions. British people consider themselves are the best people and satisfied with themselves, so they don't like to make too much change

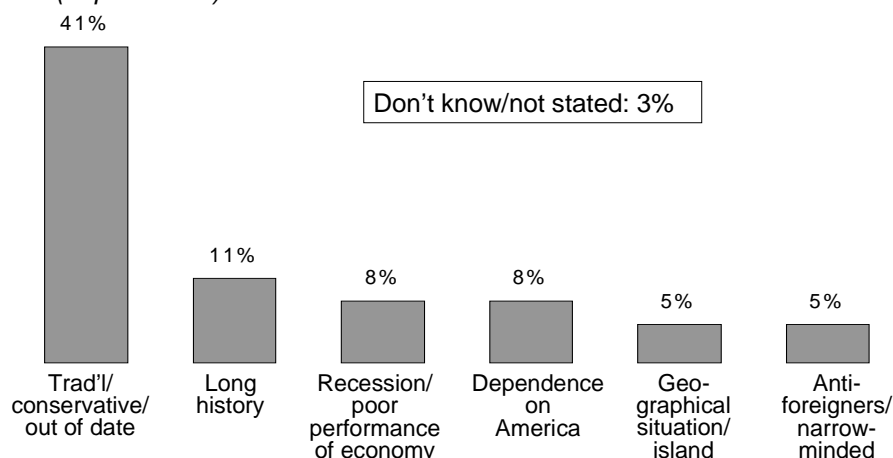
British teachers are more rigorous and they pay much attention to fundamental research

They also have enthusiasm as well as restrained temper. They are seeking more ways for reform and vigour in politics, the economy and culture

Perceived weaknesses are the mirror of perceived strengths. Tradition/conservatism are seen as the UK's one major weakness, with two fifths (41%) mentioning it. By a significant margin, more Chinese respondents raise this than in any other country surveyed. The UK's long history ranks second with one in nine (11%) mentioning this. The economy (8%) and dependence on America (8%) are also perceived weaknesses.

The United Kingdom's Major Weaknesses (Spontaneous)

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



Base: All Chinese successor generation (200)

This aged nation is now at a loss in saving GB from downfall. Glory in literature has passed away. They have little knowledge of China and prejudice against China

[Would not want to live in UK because they are..] difficult to approach and communicate with, anti-foreign – a hypocritical society

British Society

As one might expect from perceptions of the UK's strengths and weaknesses, the overwhelming majority (83%) see the UK as 'fairly' or 'very' traditional. This view is more widespread among women (91%) than men (75%). Only five per cent see the UK as 'very' or 'fairly' modern. This is far lower than the sample overall, where over one-third (37%) regard the UK as modern.

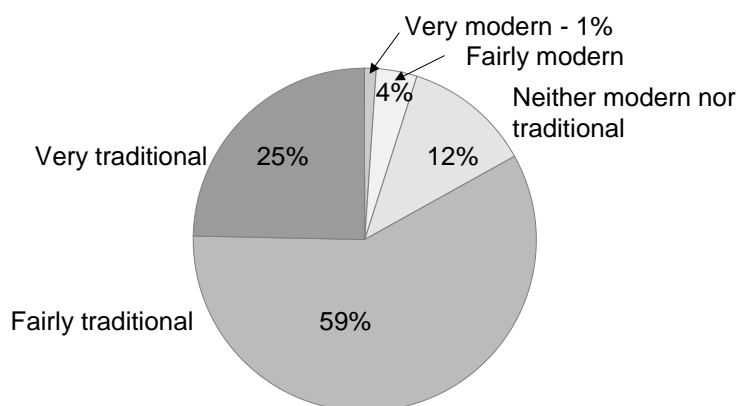
England was once the "non-sunset empire" so its people are conservative in general and America is a new land of vigour

Britain has good traditions. British people consider themselves the best people and are satisfied with themselves so they don't like to make too much change

I don't think Britain will have a bright future if it still develops following its former way. It needs dramatic reform

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 Chinese successor generation (200)

The Chinese successor generation are likely to regard the UK as committed to protecting the environment, with three quarters (74%) either 'strongly' or 'tending to' agree with this statement. This is significantly higher than the world-wide figure of 65%. Women (81%) are more likely than men (67%) to think this.

In contrast, the Chinese successor generation are less likely than their counterparts in the other countries surveyed to agree that the British system is a good example of democratic government (33% versus 65%) and that the British legal system ensures that everybody gets a fair trial (27% versus 58%). In fact, this shows that whereas most people around the world have a great deal of respect for British institutions, people in China are actually more likely to regard them as not particularly praiseworthy. The Chinese tend to have the most negative impressions of all those surveyed this year, on many of these issues.

More positive perceptions of the welfare state emerge, with half (51%) agreeing that Britain has a good health service. This is still less than the world-wide figure (65%). A minority of 13% believes that Britain no longer has a comprehensive system of social welfare.

As is the case across all the countries surveyed, the British are regarded as not very welcoming to foreigners, with half (49%) agreeing with this statement. A similar proportion (54%) agree that the British are not racially tolerant. A mere four per cent believe that Britain is now a classless society, while, in contrast, 88% disagree. The perception of Britain as a class-based society was strongly articulated in the group discussions. British leaders, businessmen, scientists, teachers and artists were more often than not described as upper or middle class, well born, or well educated.

Blair is an exception of British leaders. Maybe he represents the leader of Great Britain in the future

Overall, the successor generation in China tend to be more likely than those in other countries to be neutral about the various statements put to them, suggesting that they receive as much information about the UK as those elsewhere.

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 is committed to protecting the environment	74	7	18	0.80	0.83
Britain has a good national health service	51	7	40	0.48	0.85
British people are not racially tolerant	54	19	26	0.42	0.12
British people are not very welcoming towards foreigners	49	23	27	0.31	0.17
British society is truly 'multicultural'	34	44	21	-0.13	0.64
The British system is a good example of democratic government	33	47	20	-0.19	0.69
The British legal system ensures that everybody gets a fair trial	27	45	28	-0.23	0.95
Britain no longer has a comprehensive system of social welfare	13	46	40	-0.41	-0.04
Women are discriminated against in Britain	17	54	29	-0.43	-0.65
Britain is now a 'classless' society	4	88	8	-1.29	-0.82

* 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 Chinese successor generation (200)

The qualitative work reinforces the finding that the successor generation in China perceives Britain as traditional and hidebound. On the plus side, British society is regarded as well-ordered, secure, disciplined, rational, and polite. British laws and social welfare are admired. On the minus side, British society is perceived as anti-foreign, stifling, tedious, hypocritical and lacking innovation.

The British people are refined and courteous. They are more strict and short on creativity

They will welcome you warmly, but it is formal and polite

British people are very gentleman like and they try to keep their distance with you

The English people are more restrained, full of apathy and stiffness

British people are more rational and they have more deep consideration

Everything is in order. There is a long history and fairly complete regulations and laws

British have the better welfare and ordered society

British Business

Less than half (45%) 'strongly' or 'tend to' agree that the UK has many world-beating companies. This is significantly less than the figures recorded world-wide (72%). Professionals (50%) are more likely to agree than students (34%), mirroring the overall findings.

Only two per cent, however, 'strongly' disagree that Britain has many world-beating companies. One in five (22%) 'tend to' disagree and a quarter (24%) are neutral.

The US and Japan fare significantly better, with 97% and 95% respectively either 'strongly' or 'tending' to agree that each country has many world-beating companies. Germany scores 76% while France receives a similar rating to the United Kingdom (50%).

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	85	12	0	0	1
Japan	48	47	3	2	0
Germany	27	49	8	3	1
UK	10	35	24	22	2
France	8	42	23	16	2

Base: All Chinese successor generation (200)

The UK fares even more poorly as a major financial trading centre, as while 98% and 78% agree that the US and Japan respectively are major financial trading centres, Germany, the UK, and France lag some way behind. Again the rating for the UK among the Chinese successor generation is significantly lower than among the survey overall (73%). On the positive side, those who disagree that the United Kingdom is a major financial trading centre (31%) are more likely to 'tend to disagree' (28%) than 'strongly disagree' (3%).

Financial Centres

Q5 Please tell me the extent to which you agree or disagree that is a major financial trading centre.

	Strongly agree	Tend to Agree	Neither/ Nor	Tend to disagree	Strongly disagree
	%	%	%	%	%
USA	74	24	1	1	0
Japan	21	57	6	12	3
Germany	7	44	18	17	2
UK	7	32	23	28	3
France	1	33	20	32	4

Base: All Chinese successor generation (200)

The overwhelming view of British businessmen which emerges from the discussion groups is that they are conservative, cautious and averse to risk-taking. They are regarded as well-educated and there is a perception that they have inherited their business. Business specialities are seen to be financial and insurance services. American businessmen are seen as more innovative, but less reliable and responsible, although some do express the view that British businessmen are money-grabbing.

Most English businessmen inherited their father's business as well as experience

They are conservative, well educated and well ordered

They can do a good job when the business is stable. They are not at the beginning of the business

The British business persons in China are profiteers

We should welcome investments from Britain. American investments are like an invading battleship, while the British investments are more co-operative

[The British businessman is..] serious, conservative, follows discipline and have little creativity. Mainly deal in some traditional trades

Two in three perceive British products and services as 'very' or 'fairly' good. This is significantly less than world-wide (81%). These favourable views are more likely to be lukewarm, with half of those questioned (50%) saying that British goods are 'fairly' good.

No respondents rated British goods and services as 'very' poor and a mere two per cent described them as 'fairly' poor. This reflects the results world-wide. One in five are neutral towards the quality of British products.

British companies are almost perfect in all aspects. Because of their full after sales service you are willing to buy their products and feel it is worthy

British management is perceived more favourably than the British workforce. Two-thirds see management as either 'very' or 'fairly' good. As has been the pattern in other areas, this is significantly less than overall (74%).

Less than one in ten see British management as 'fairly' or 'very' poor. Once again, one in five are neutral.

A greater proportion (28%) are neutral about the British workforce. While 11% are unable to offer any opinion at all, 54% rate it as good (compared to 64% world-wide), and only seven per cent see it as poor.

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	18	6	17
Fairly good	50	49	51
Neither good nor poor	20	28	20
Fairly poor	2	6	8
Very poor	0	1	1
Don't know	11	11	6
Mean score	+0.94	+0.59	+0.80

Base: All Chinese successor generation (200)

British Science and Technology

Members of the successor generation in China are more likely to disagree than agree that the UK has a strong reputation for scientific and technological innovation. A mere two per cent 'strongly' agree and one-fifth 'tend to' agree, compared to 20% and 42% respectively world-wide. Two fifths (41%) either 'strongly' or 'tend to' disagree. Many Chinese, however, are either neutral, or unable to express an opinion on the subject.

As in other areas, the US scores highly, with nearly all respondents agreeing that it has a strong reputation for scientific and technological innovation (75% agree strongly). Japan ranks second, but, in contrast, respondents are more likely to 'tend to' (54%) than 'strongly' (21%) agree. France achieves comparable figures to the UK, with 23% agreeing that it has a strong reputation. The successor generation in China are significantly less likely to highly rate the scientific and technological innovation of Japan, Germany and France compared to the survey overall.

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
	%	%	%	%	%
USA	75	22	1	1	0
Japan	21	54	7	15	2
Germany	16	47	15	8	2
UK	2	20	29	34	7
France	2	21	27	38	2

Base: All Chinese successor generation (200)

The qualitative work shows that British science is associated with research into biological and medical issues and maths and physics. Positive images of the British scientist emerge, including that they are hardworking, dedicated, careful, and well qualified. However, although some see British science as innovative, more perceive the British scientist to be conservative.

British scientists are conservative, have less creativity and sense of exploration

British scientists have novel thoughts in science with many accomplishments, regarding work as their enjoyment rather than a living method

They are devoted, persisting in their work despite any frustration

British Media

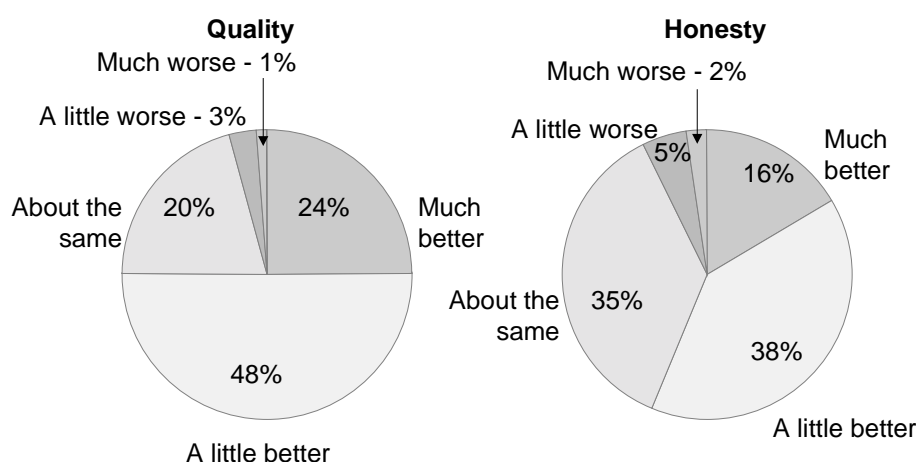
The majority of those questioned do not regard the British media as truthful, with 42% tending to disagree, and 12% 'strongly' disagreeing with the statement that the British media tells the truth. Just one in eight agree strongly or tend to do so. This is significantly less than the world-wide figure (36%).

As with the world-wide results, this would appear to reflect a more widely held scepticism about the media. A majority (54%) regard the honesty of the British press as either 'much' or 'a little' better than that of the Chinese press. Around one in three (35%) think they are 'about the same.'

Seven in ten of those questioned (71%) rate the quality of the British media more highly than the Chinese media. This is significantly higher than the all country average of 63%. One-fifth think that both are 'about the same.' Only three per cent in China say the British media is worse in terms of quality.

British Media

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



Base: All Chinese successor generation (200)

The qualitative work demonstrates that British newspapers are seen by the successor generation in China to be reliable, accurate, and informative. It is felt that they cover a wide range of issues, such as politics, public interest stories, sport, the royal family and the weather. However although American newspapers are less admired, some would prefer to read them.

Wide coverage and good layout. American newspapers are too garish

British newspapers are more reliable than the American ones because America is always against China in the press

British newspapers have the best reports on football

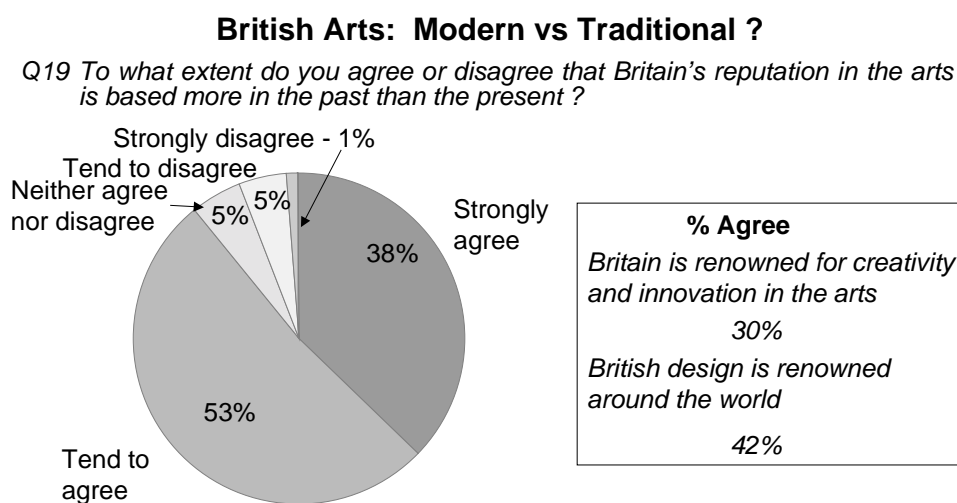
Useful and latest abundant news

British Art

Three in ten agree that Britain is renowned for creativity and innovation in the arts. Those aged 29-35 (38%) are more likely to hold this view than those in the 22-28 age group (24%). More than half, however, disagree, which is a substantially higher proportion than the all country average of one in five (22%), and is the highest score of all thirteen countries measured.

British design appears to be better regarded, in that four in ten (42%) either 'strongly' or 'tend to' agree that it is renowned around the world. One in four disagree. Men (32%) and those aged between 22-28 (29%) are more likely to disagree than women (14%) and the 29-35 age group (16%). One in three have no strong feelings either way. These findings are in line with the all country figures where around half agree and one in five disagree.

Britain's reputation in the arts is perceived as being based more in the past than the present. An overwhelming nine in ten agree that this is the case. This is the highest rating given across the thirteen countries included in this study, where the average figure is 66%.



Base: All Chinese successor generation (200)

The discussion groups tended to associate British art with Shakespeare and English literature. Although some comments ("long hair and glasses") suggest that in some quarters artists are viewed as bohemian, British artists generally appear to be regarded as serious and wealthy. Their work is seen as being of high quality, but conservative. In contrast, the American artist is seen as more commercial and modern.

Shakespeare is representative

Works of British artists are of more profundity than of America, but the latter have more commercial features

Not so popular and creative. British culture is conservative

It is certain that they are middle and upper class in Britain

These perceptions appear to be shaped by a lack of awareness of contemporary British artists. Four in five (81%) are unable to name any at all. The world-wide figure (60%) is rather lower, indicating that China has little exposure to British art. In China, only the Spice Girls, Elton John, and the Beatles are able to muster a rating above 4%, and these are all musical acts.

Leading British Artists (Spontaneous)

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

Top answers:	%
Spice Girls	6
The Beatles	5
Elton John	5
Hugh Grant	3
William Shakespeare	2
Enya	2
Don't know	81

All other answers 1% or less

Base: All Chinese successor generation (200)

In contrast, British pop musicians are better known, although over half of those questioned (53%) are unable to mention a single one. Women (65%) are more likely than men (42%) not to be able to name a musician. This is also the case with those aged 29-35 (74%) compared to those aged 22-28 (35%).

The Spice Girls seem to be Britain's most famous musical export to China, mentioned by more than one in four. Younger respondents are more likely to mention them, but this may simply reflect the fact that they are better acquainted with British pop music generally. The Beatles are regarded as contemporary by 14%.

Leading British Pop Musicians (Spontaneous)

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

Top answers:	%
Spice Girls	28
The Beatles	14
Elton John	12
Enya	7
John Lennon	3
Don't know	53

All other answers 2% or less

Base: All Chinese successor generation (200)

British Personalities

Respondents were shown a list of 22 British personalities, and asked which they had heard of. Tony Blair is the best known, with nine in ten (89%) saying that they had heard of him. Men and those aged 22-28 are the most likely groups to recognise him. These sub-groups are also more likely to recognise the Spice Girls, who rank second overall with a score of 83%.

Tony Blair and the Spice Girls are also placed first and second in the world-wide survey. Personalities who are particularly well known in China are PD James who scores 71%, compared to 16% world-wide and Stephen Hawking who is mentioned by 69% in China, but 41% of all those surveyed. No other personality is recognised by more than half of those questioned.

Ten score less highly than Stephen Shaw from the British Council, whose name was added to the list as a control. One in five claim to have heard of him, which is similar to the world-wide figure of 19%. William Hague (19%), Richard Branson (11%) and Damien Hirst (1%) are some of the personalities who score less than Stephen.

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 Sandie Shaw perhaps), or perhaps it is simply a case of overclaiming - a respondent pretending that they know someone just because they feel that they ought to. In this case, it is more likely to be the first explanation. There is no obvious reason why someone might make up knowledge of Stephen Shaw but admit that they have never heard of Tim Henman or Liam Gallagher.

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
	%	%	%
Tony Blair	89	81	91
Spice Girls	83	56	67
P D James	71	45	63
Stephen Hawking	69	35	51
Hugh Grant	44	26	59
Robin Williams	42	8	19
Naomi Campbell	37	10	27
Kate Winslet	37	18	49
Linford Christie	25	10	40
John Galliano	23	5	22
Vivienne Westwood	22	6	27
Stephen Shaw	20	6	30
William Hague	19	5	26
Tim Henman	12	6	50
James Dyson	12	5	42
Richard Branson	11	4	36
David Hockney	8	2	25
Liam Gallagher	6	2	33
Delia Smith	6	2	33
Rowan Atkinson	2	1	50
Anita Roddick	2	0	0
Damian Hirst	1	0	0
None of these	0	0	-
Don't know	0	5	-

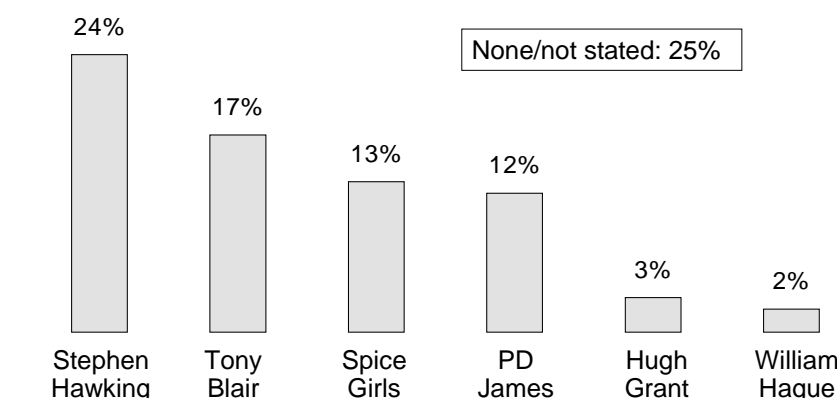
Base: All Chinese successor generation (200)

Tony Blair is the personality most likely to be recognised as British. Four in five are aware that he is from the UK. This is a similar proportion to world-wide. Over half (56%) recognise that the Spice Girls are British, which corresponds to the all country average. Men are more likely than women to be aware that they are British. No other personality scores more than 50%, although nearly half know that P D James is British and one-third know that Stephen Hawking is. The third column in the table above shows the proportion of those who recognise each person who believe them to be British. It can be seen that while PD James and Hugh Grant are automatically associated with Britain by many Chinese, just one in four of those who know of Naomi Campbell think that she is from the UK.

Stephen Hawking emerges as the most likely role model in China, chosen by a quarter, in contrast to the all country average of 7%. Men, those aged 22-28 and students are most likely to nominate him. Tony Blair ranks second with a score of 17%. Although he is better known among those aged 22-28, he is more likely to be seen as a role model among those aged 29-35. The Spice Girls and PD James are nominated by 13% and 12% respectively. Both these scores are well above the all country figures of 3% and 1% each.

Role Models

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



Base: All Chinese successor generation (200)

Britain's Relationships with other Countries

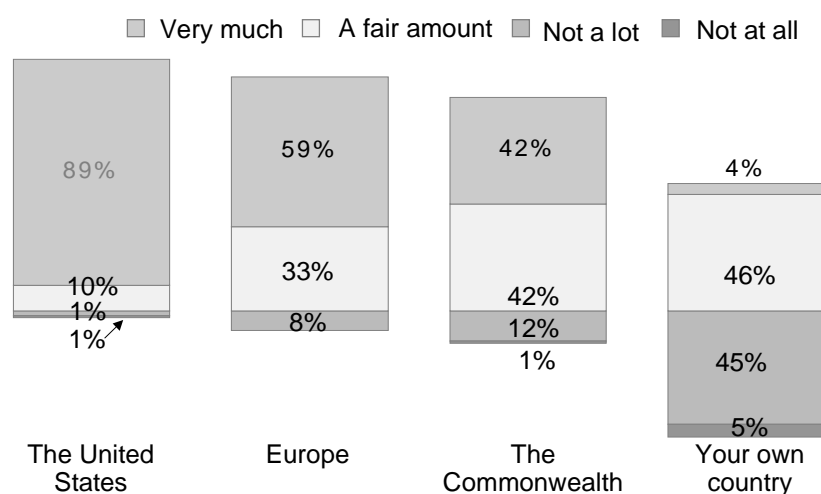
The special relationship is alive and well so far as the successor generation in China are concerned. Nine in ten (89%) say that Britain values its relationship with the United States 'very' much. A further one in ten think that we value this relationship a 'fair amount.' The equivalent figures world-wide are 61% and 31%.

Britain is perceived as valuing its relationship with Europe by 91% of those questioned. Three in five think that we value the relationship 'very much'. More than four in five believe that Britain's relationship with the Commonwealth is valued either 'very much' or a 'fair amount.'

On the other hand, just four per cent think that Britain values its relationship with China 'very much'. Nearly half (46%) believe that this relationship is valued 'a fair amount', but a similar proportion (45%) say that the relationship is valued 'not a lot'. This is rather higher than the all country average of 31%, who feel that we do not value our relationship with the respondent's home country a lot.

Relationships Between Countries

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



Base: All Chinese successor generation (200)

In the discussion groups the view was expressed that Britain has little interest in what happens in other nations. Some saw the British, and the UK as a whole, as being anti-foreigners. Others, however, felt that the UK is less aggressive towards other nations than America.

Mrs Thatcher took a cautious policy in Britain though she fulfilled chauvinism abroad

[Overseas events] British people have the least interest

The British try to share their best things with other nations like a priest. So Britain is morally better than America

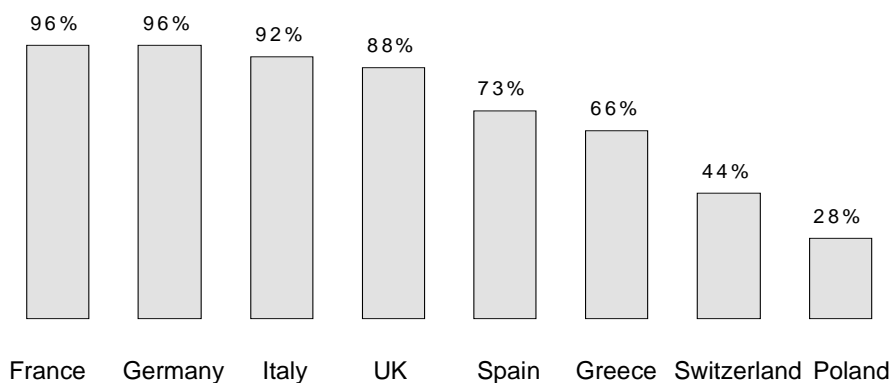
The European Union

France, Germany, and Italy are all widely recognised as members of the European Union. The United Kingdom comes fourth, not far behind the top three. All these figures are significantly higher than the all country score, which in the case of the United Kingdom is 80%, indicating that the Chinese are rather more aware than average about what is going on in Europe. Those aged 29-35 tend to be more knowledgeable on this topic than their younger counterparts.

Just under half think that Switzerland is part of the European Union, while three in ten make the same mistake about Poland.

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.



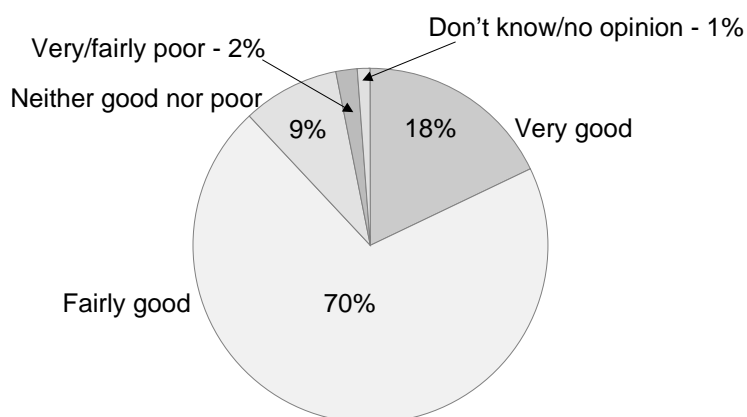
Base: All Chinese successor generation (200)

Education

British higher education is well regarded by members of the successor generation in China. Almost nine in ten (88%) feel that it is good. However 70% describe British education as 'fairly' good, as opposed to 'very' good (18%). The world-wide sample is more enthusiastic, with 44% saying that British education is 'very' good and 44% 'fairly' good.

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?



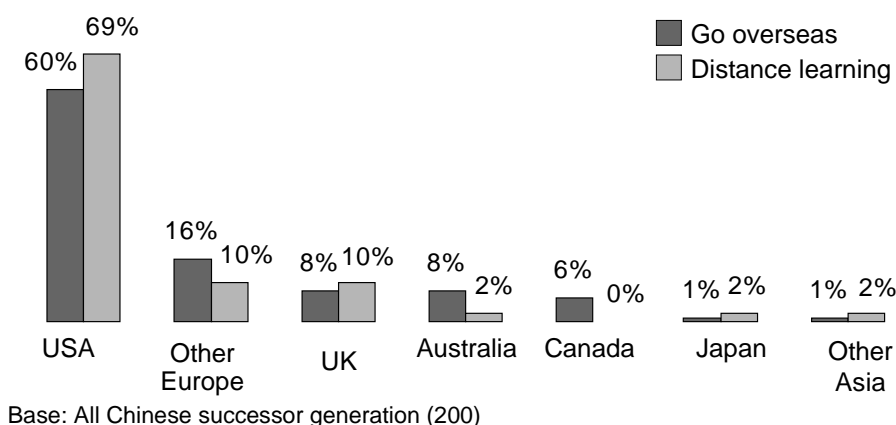
Base: All Chinese successor generation (200)

When asked in which country they would prefer to study, three in five choose the United States. This is higher than the world-wide total of 46%, and is more than seven times the number who would choose the United Kingdom (eight per cent), despite the positive ratings that the British education system receives. More would prefer to study in other European countries than in the UK.

If those questioned were considering a distance learning course, more than seven in ten would prefer a course run from USA. This, again, is seven times as many as would opt for the United Kingdom (10%). Another one in ten would prefer a distance learning course based in another European country.

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 ?



British teachers were praised in the group discussions for their dedication, precision and rigour. However they are also perceived as being more rigid, less sociable, and less creative than their American counterparts. British education appears to be more strongly associated with the arts than the sciences.

They are well educated and strict in research. They cherish their position and are devoted to it

British teachers have a commanding teaching style. The American ones give more space for consulting and communication

British educationalists are like a "teacher", they work in order and routine

American teachers are casual and give more freedom to the students. I once met an American who would amuse you , but the British never will

An apparent preference for American teaching styles does not fully explain the greater enthusiasm expressed for American education courses. An additional factor is that four in five believe that a qualification from the USA would have more credibility with an employer than a qualification from the other five countries mentioned. This is well above the all country average of 58%. A qualification from the UK is said to have the most credibility by 14% - the only other country to receive a significant percentage of answers.

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	82	58
UK	14	23
China/Home country	3	6
Japan	1	5
Canada	1	3
Australia	0	2
Don't know	1	3

Base: All Chinese successor generation (200)

While 12% of Chinese respondents believe that the British are 'very' well educated, a further three-quarters think we are 'fairly' well educated. World-wide, a higher proportion are likely to think of us as very well educated, but more are also neutral. Only three per cent of Chinese think that the British are poorly educated.

The British are conservative and well educated

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	12	23
Fairly well educated	75	53
Neither well nor poorly	9	17
Fairly poorly educated	3	4
Very poorly educated	0	1
Don't know	2	3

Base: All Chinese successor generation (200)

Languages and the English Language

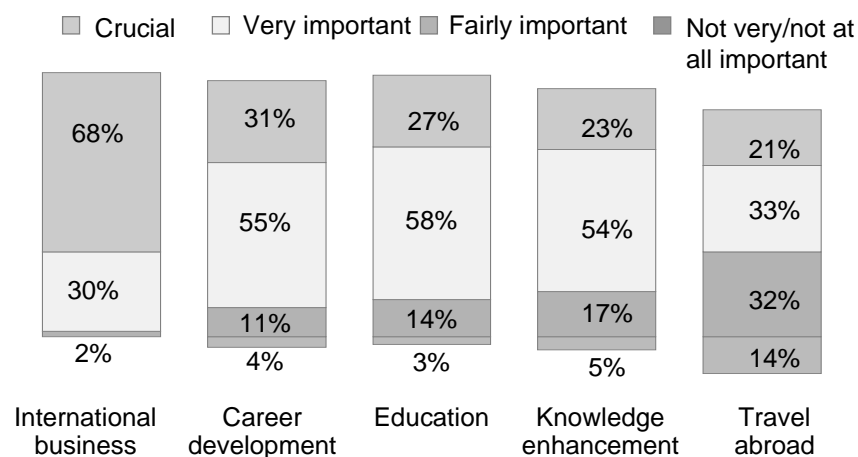
Nine in ten members of the successor generation in China speak English (92%). This mirrors the survey-wide figure of 91%. Students (98%) are more likely to speak English than professionals (89%). Other non-native languages are spoken by substantially fewer. Ten per cent speak Japanese (rather higher than the world-wide average of two per cent), eight per cent speak German, while French is spoken by just one per cent of respondents. None of the Chinese respondents speak Spanish.

French is nominated as the language most respondents would like to speak (59%). It is more popular among women (66%) than men (52%). Two in five say that they would like to speak German (38%). Despite the overall negative attitude shown towards Japan, more than one in three express a desire to speak Japanese (36%). One in seven (14%) would like to speak Spanish.

English is seen as the 'lingua franca' of international business by the successor generation in China, as in other countries. Two-thirds believe that the ability to speak English is 'crucial' for international business, and a further 30% regard it as 'very important'. While 86% see English as crucial or very important for career development, domestic and overseas education scores 85%, and travel abroad 54%.

Importance of English Language

Q10 How important, would you say, is the ability to speak English for the following activities?



Base: All Chinese successor generation (200)

Sources of Information about Countries

A wide variety of sources of information are used by members of the successor generation to form an opinion about a country. In China the most popular sources are books (53%), followed by local TV news (44%), the local press (35%) and films (31%). Other important sources are international TV, international press, people who have visited that country and local and international radio.

Local TV news (22%) and books (21%) are considered the most influential sources. Those aged 29-35 are more likely than the 22-28 age group to see local TV news as the source which is most influential in forming an opinion.

Books are more likely than anything other medium to shape opinions specifically about the UK. They are mentioned by three in five, well above the all country average of 27%. National TV news and the local press are the next most important sources, mentioned by 42% and 41% respectively. Films (30%) are also significant.

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.

	Q1a	Q2	Q32
	Important	Most	Most
	%	Influential	important
		%	for UK
			%
Books	53	21	60
National/Local TV news	44	22	42
Local press	35	6	41
Films	31	2	30
Local radio	23	3	13
Word of mouth - friends & family	18	3	13
(Other) International press	26	6	11
People who have visited that country/ the UK	25	8	11
Media (press, TV, radio) from that country	17	4	n/a
BBC World Service	n/a	n/a	9
(Other) International radio	22	7	8
British press	n/a	n/a	7
(Other) International TV	28	8	6
Know people from that country/the UK	12	4	5
BBC World TV	n/a	n/a	5
Word of mouth - work colleagues	7	1	4
Other official (UK) sources from that country	3	1	3
Academic sources	1	0	3
Visiting the country/the UK personally	10	5	2
Other local TV	10	2	n/a
Tourist authorities from that country/in the UK	1	0	2
Internet	1	1	1
Other	1	0	0
Don't know	1	0	0

Base: All Chinese successor generation (200)

The vast majority of the successor generation in China (98%) have never visited the United Kingdom. As would be expected in a survey which includes countries such as France and Germany, this is rather lower than the world-wide average, with figures among the countries surveyed varying widely. China's figures are among the lowest scores, similar to those of India (99%) and Egypt (87%).

Implications

Chinese perceptions of Britain can perhaps be summed up in one word: 'conservative'. For those who took part in the discussion groups, this is not necessarily a bad thing. British businessmen, for example, may not be innovative, but they are responsible. Our artists are not creative, but their work is of high quality. Our scientists do not always break the mould, but they are dedicated. Results in the quantitative survey indicate that while tradition is seen as a strength by some, it is more likely to be labelled a weakness.

The bombing of the Chinese embassy in Kosovo, which took place after the qualitative work, but before the quantitative survey, appears to have hardened attitudes towards Britain.

British Society

British society is regarded as traditional, stable and class based.

While our health service and social welfare system appear to be admired, attitudes towards our government and legal system are less positive.

The majority believe that we are not racially tolerant or welcoming towards foreigners. Most think that we value our relationship with China, but a substantial proportion believe that we do not.

British Business

British business is seen to be conservative and lacking in innovation, although more positively, it is regarded as reliable and responsible. American business is more associated with risk taking and high-tech industries.

Views of British management, workers, products and services tend to be positive. However, the Chinese are less likely than other nationalities to believe that we have many world beating companies or are a major financial trading centre. Britain lags well behind America and Japan in these respects.

British Art

British art is seen to be rooted in the past. This is reflected by the fact that four in five are unable to name a contemporary British artist. There is greater awareness of British pop music, but the Beatles are the second best known 'contemporary' band. More encouragingly, a significant minority regard British design as world-renowned.

British Education

British education is well regarded, although China is less enthusiastic in its views than other countries. The British are also seen to be well educated.

Despite this, American qualifications are far more popular. This is linked to the fact that they are believed to have more credibility with potential employers. British education may suffer in comparison because it is more associated with non-vocational subjects.

The ability to speak English is seen as essential for international business, and important for career development, education and knowledge enhancement. Most of those questioned can speak English.

How to Communicate with the Chinese Successor Generation

Books are the most popular source of information about other countries in general, and the UK in particular. Local TV, local press, international media and films are also important. The British media have a smaller influence on opinions.

While the ability to influence the Chinese media may be limited, these other sources should be exploited to update opinions on Britain. It may be useful to bear in mind that the British media is generally seen to be more honest and of a better quality than the Chinese media.

The possibility of using football to communicate key messages should also be explored. Younger males, who tend to hold more negative views towards Britain, are more likely to associate football with England (as opposed to Britain).

Admired figures such as Stephen Hawking and the Spice Girls need to be more clearly branded as British. Tony Blair, the one figure who is already closely associated with Britain, could also be used to shape attitudes.

A significant minority are neutral about various aspects of Britain. This represents both a challenge and an advantage when considering strategies to re-brand Britain in China.

MORI/ 11927

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Appendices

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 200 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% ±
2,600	1.2	1.8	1.9
1,000	1.9	2.8	3.1
200	4.2	6.4	6.9

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% ±
101 vs 99 (men vs women)	8.3	12.7	13.9
141 vs 59 (professionals vs students)	9.1	13.9	15.2

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).

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