

Attitudes Towards Britain and the British

France

**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 France. 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	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 France, the definition used was:

- Aged 20-35
- Education: diploma from the highest French schools (HEC, ENA,...)
- Managers or opinion leaders

Methodology

The survey was conducted in two distinct phases, beginning with two **qualitative focus group discussions** in France. The groups were held in Paris on 6th and 11th May 1999. Again, the decision as to which cities to use was taken in consultation with MORI's local partner and the British Council office in France. In each case, they were moderated by an experienced researcher with MORI's partner in France, Institut Français de Démoscopie.

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 France, this was undertaken among 199 members of the same target audience. Interviewing was conducted face-to-face between 13th July and 19th August 1999 in Paris.

Quotas were set to ensure that a reasonable cross-section of members of the successor generation was 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 the results for France, and compare them to the 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

Of the five countries measured, it is naturally their own country which the French successor generation feels most familiar with and most favourably disposed towards.

Of the other four countries, the UK and US are best known (around two-thirds know them well), followed by Germany (46%). Japan is least known, as it is world-wide. In France, just one in seven say they know it well, giving it an even lower profile in France than on average across the 13 countries covered in the survey. The UK is the only country to be better known in France than it is on average world-wide, where 57% know it well, no doubt related to the close geographical proximity, and shared history, of the two nations.

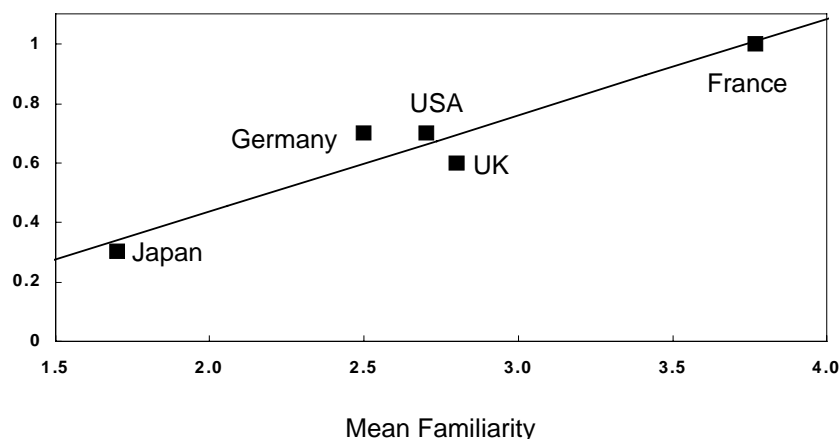
Among those who know something about each country, the UK, USA and Germany all record similar overall ratings; roughly two-thirds are favourable and fewer than one in five unfavourable. Reflecting its lower profile, Japan is less positively viewed – 45% of those who know something about Japan regard it in a favourable light and one in five is unfavourable.

Though the UK is better known in France than in many other countries, it is not better regarded – slightly fewer give it a favourable rating in France (65% vs 71% overall) and slightly more are unfavourable (14% vs 8% overall). The French also tend to be more critical of the US and Japan, though they are slightly more favourably inclined towards Germany than is true across the other 12 countries taken as a whole.

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, 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. Research shows that the better a country is known, the better regarded it is. This is the case for France - obviously known by all respondents and achieving the highest levels of favourability - whereas Japan, the least well-known of the five countries, has a very poor level of favourability. In France, USA, Germany and UK enjoy positive levels of familiarity and favourability.

Familiarity & Favourability Towards Countries

Mean Favourability



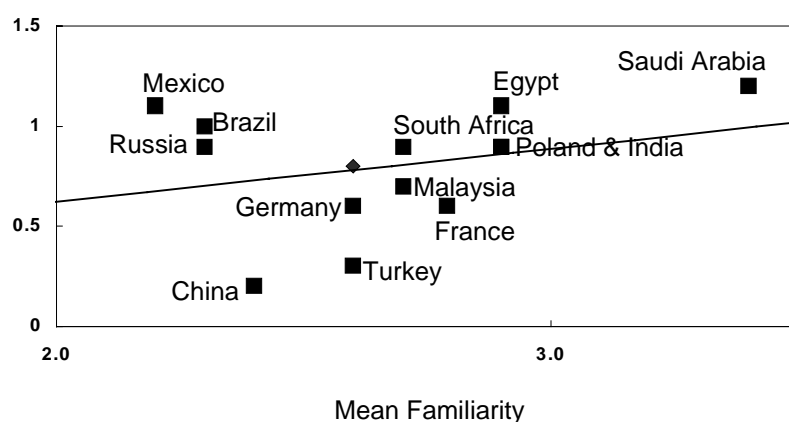
Base: All successor generation in France (199)

* 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 France with the findings in the other 12 countries. It shows that opinions of the United Kingdom in France are rather more negative than average.

Familiarity & Favourability Towards the United Kingdom

Mean Favourability



Base: All successor generation in France (199)

In comparison, Saudi Arabians not only claim to know the most about Britain but they are also the most favourable to us; in contrast, opinions of Britain in China are rather more negative. This might well have been influenced by the British involvement in Kosovo and the bombing of the Chinese Embassy, fieldwork having taken place shortly after this event.

Images of the United Kingdom

In France, Scotland and England are the most recognised parts of Great Britain - cited by 94% and 93% respectively - closely followed by Wales (89%) and Northern Ireland (87%). Only a minority of the successor generation in France spontaneously says that the United Kingdom is the same as Great Britain (4%).

There are many differences between the English, the Irish and the Scottish. Irish and Scottish are more friendly

Although kilts are by far the most recognised symbol of **Scotland** among the countries measured (29%), whisky is the most thought-of-image of Scotland in France (25%); kilts and the highlands/mountains are the second and third most mentioned images. Castles are cited by one in ten respondents. No other aspect is mentioned by more than one in twenty.

Women have a more romantic image of Scotland than men and are more likely to mention kilts (22% vs. 16%) and the Highlands (18% vs. 11%), than whisky (18% vs. 29%).

World-wide, **Northern Ireland** conjures up an image of violence above all else (mentioned spontaneously by 37%); this figure rises to 45% among the successor generation in France; other aspects of the current troubles are mentioned like IRA/Sinn Féin (14%) and religion (12%). However, the spontaneous association of Northern Ireland with the peace process is rather less (only cited by 4%). More positive pictures like the scenery or Guinness are nominated by around 5%.

In Ireland, when I said to an old woman that I was French, she said to me: "very well!"

The one image of **Wales** among the French successor generation is far more positive than of Northern Ireland: France, a rugby playing nation itself, is more likely to associate Wales with rugby than anything else (37% vs. 9% world-wide). Only mentioned by a minority is Prince Charles, Prince of Wales, while an even smaller proportion associates Wales with Princess Diana, Princess of Wales (2%). World-wide associations are more evenly spread with castles, rugby, mountains and sheep all being mentioned by more than five per cent of the successor generation.

Images of UK Countries

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

(Top Answers)

Scotland	France %	World- wide %	Northern Ireland	France %	World- wide %
Whisky	25	15	Violence/religious war/conflict	45	37
Kilts	18	29	IRA/Sinn Fein	14	8
Highlands/Mountains	14	17	Religion	12	6
Castles	10	1	Scenery	6	11
Scenery/landscapes	5	1	Peace process	4	9
Cold/wet weather	4	6	Guinness	3	3
Loch Ness/monster	4	1			
Nothing/don't know/no answer	4	6	Nothing/don't know/no answer	2	11

England	France %	World- wide %	Wales	France %	World- wide %
London	16	4	Rugby	37	9
Houses of Parliament/Big Ben	13	15	Prince Charles	8	6
Tower of London/Beefeaters	12	14	Sheep	7	7
The Royal family	9	19	Castles	5	13
A country pub	6	1	Cardiff	5	2
Powerful economy	6	1	Coal mining	4	3
Arrogant people	4	1	Beautiful landscapes	4	1
Tony Blair	3	3	The Valleys	3	3
The Queen	3	2			
Nothing/don't know/no answer	2	3	Nothing/don't know/no answer	15	25

All other answers 2% or less

Base: All successor generation in 13 countries (2,952), France (199)

Not surprisingly, men are more likely to connect Wales with rugby than women are (45% vs. 21%).

The Royal family is a strong symbol of **England** among members of the successor generation world-wide. However, the picture is different in France: London is the most frequent image that the French associate with England - (16% vs. 4% world-wide) - while around one in ten refer to the British monarchy. However, the Houses of Parliament and the Tower of London remain the second and third most mentioned (13% and 12%). Only 2% refer to bad/grey weather.

Britain's Strengths & Weaknesses

World-wide, the UK'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%).

The pattern is different in France: UK's tradition and conservatism are perceived more as a weakness than a strength (10% vs. 1%); the country's key strength is perceived to be its language, the English language universally spoken (14% vs. 2% world-wide); the stable British economy (12%), as well as our industrial and capitalist power (8% and 7%).

Its main strength is its language and the fact that everybody speaks English in the world

(The UK) is a dynamic country that has modernised its economy and its State/government

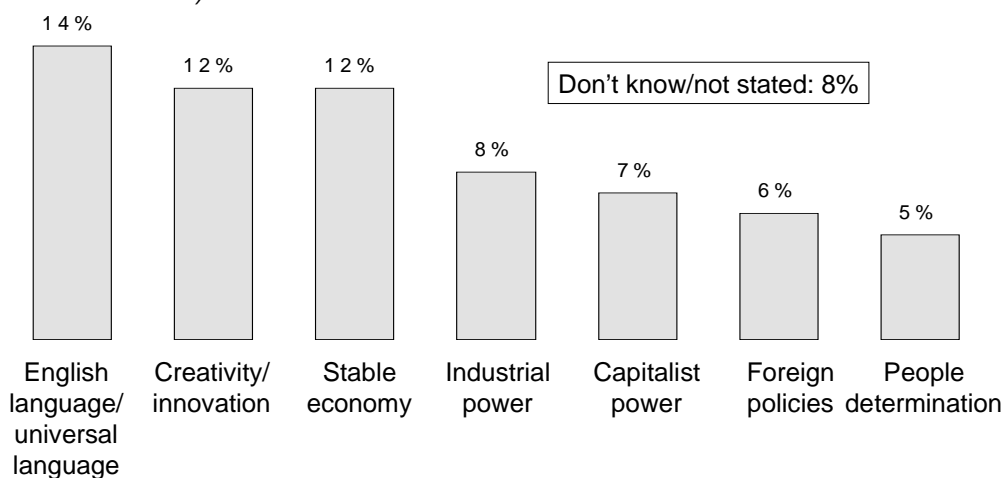
Companies are very dynamic and competitive on the international scene

Companies grow in a much more liberal environment

France is also more likely than any of the other countries measured to spontaneously praise the United Kingdom for its creativity, innovation, discoveries and advanced technology, its second most mentioned strength (12% vs. 3% world-wide).

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 France (1999)

As might be expected, the French (and the Germans) are more likely than any other nations to see British disinterest in Europe (and the Euro) as a major weakness - mentioned by 14% - while a further 8% cite UK's dependence on America, both connected according to the French.

They are not European enough; they do not really care about Europe. They show a total disinterest in the big European issues, the building of Europe, its defence and diplomacy

They are too independent from Europe

Their foreign policy is dictated by the Americans

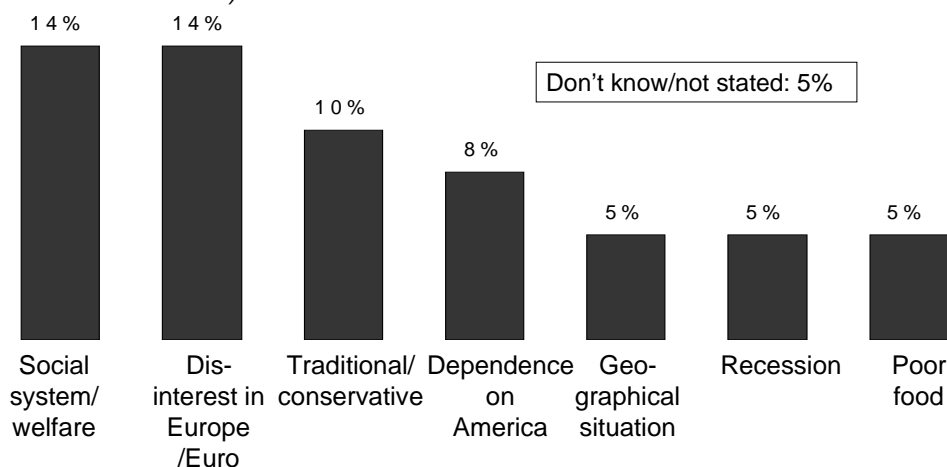
A similar proportion of French members of the successor generation perceives the British social system as a weakness.

(Its main weakness is) the failure of their social system and national welfare system

(Its main weakness is) the social issue, the quasi-non-existence of their social/health cover

The United Kingdom's Major Weaknesses (Spontaneous)

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



Base: All successor generation in France (199)

British Society

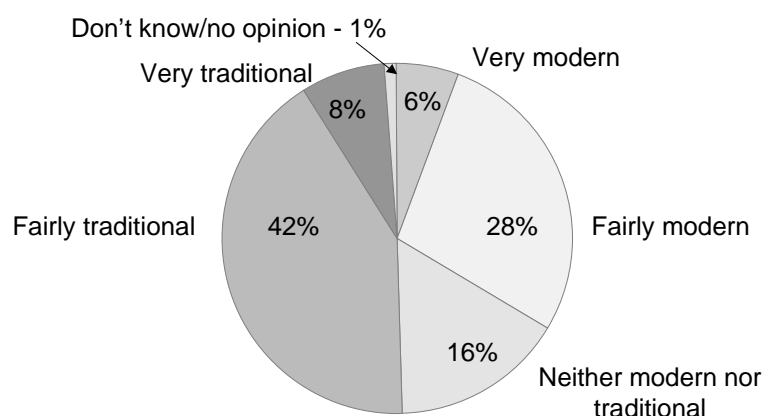
Britain is more likely to be regarded as a traditional than a modern society. (As we have seen, tradition/conservatism is perceived as one of our key weaknesses, despite the fact that one of our key strengths is felt to be our creativity and innovation). Half believe that Britain is a traditional society, compared to a third who think we are modern.

The balance of opinion world-wide is also that we are a traditional rather than a modern society. There are exceptions, though. Generally speaking, it is the more 'traditional' societies that see Britain as modern - Egypt, India and Saudi Arabia.

The view of Britain as a traditional rather than a modern society is particularly prevalent among women in France, 60% of whom see us as traditional as opposed to 44% among men.

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 France (199)

In the qualitative research, British people were felt to act according to old social rules and, therefore, not felt to act they way they think but they way they must to a given situation. The French acknowledge the fact that there are many differences between them and the British (eg food, general attitude, weather...) but this behaviour is perceived as being hypocritical and leads to contradictions such as politically correct attitudes and yet examples of eccentric behaviour.

They are puritans and Madonna is wearing a suspender belt on TV shows

They are not as free as we are to demonstrate. The British are more submissive than the French, who are more rebellious

The reforms of Margaret Thatcher would have never been accepted in France

Overall, though, British society is regarded positively by the French members of the successor generation, especially its democratic government (77%). In the groups, many mentioned Tony Blair as the symbol of the new modern Britain and praised his capacity to communicate (seen as the main problem of British leaders in the past, and maybe British people in general) and his being pro-European in contrast with the government of John Major. Tony Blair was definitely seen as quite the opposite of Margaret Thatcher, who was described as a deeply conservative woman. However, they strongly criticised the old political structure (the Lords), which was seen as too feudal.

The overall positive attitude towards our system of government therefore reinforces the impressions gained in the focus group discussions, where British decision-making was one of the most positive aspects of our society to be discussed. Although there was a certain amount of disagreement over the extent to which the British public themselves get involved in the decision-making processes, most participants agreed that our leaders earn a great deal of respect, through their skills, and their honesty.

It is a combination between tradition - with the Lords and the Commons - and efficacy

The UK is one of the first democracies in Europe

Blair is more European than his predecessors but I don't think that one man can be the spokesman for 60 million people

Other positive aspects of British society according to the French are its multiculturalism (67%) and legal system (53%). In addition, British society also tends to be regarded as racially tolerant (47%) - an opinion not shared world-wide - and one in which women are not discriminated against (47%). However, members of the successor generation most certainly do not believe that Britain is a classless society.

Social classes are much more important in Britain than in France, it is comparable to Nigeria. There is a big gap between the rich and the poor

A significant minority (30%) also feels that we are not welcoming towards foreigners, though marginally more (40%) think that we are. World-wide, the balance of opinion is that we are not welcoming to foreigners.

Comments from the group discussions put more light on these perceptions. British people are not necessarily seen as unfriendly as such - the French actually said that the welcome is cordial - but the French see the British as cold, cautious people who are too polite to be honest.

You never can tell what they have in mind

Furthermore, they believe that the fact that we live on an island has many negative impacts on our relationship with other nations, because we have had to protect ourselves and live in self-sufficiency for centuries.

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 *
The British system is a good example of democratic government	77	9	14	+1.01	+0.69
Britain no longer has a comprehensive system of social welfare	61	22	12	+0.69	-0.04
British society is truly 'multicultural'	67	18	13	+0.62	+0.64
The British legal system ensures that everybody gets a fair trial	53	12	24	+0.58	+0.72
Britain is committed to protecting the environment	40	21	24	+0.31	+0.83
British people are not very welcoming towards foreigners	30	40	29	-0.11	+0.17
British people are not racially tolerant	20	47	24	-0.39	+0.12
Women are discriminated against in Britain	14	47	26	-0.49	-0.65
Britain has a good national health service	23	51	18	-0.45	+0.85
Britain is now a 'classless' society	5	86	9	-1.25	-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 successor generation in 13 countries (2,952), France (199)

Echoing perceptions of the UK's weaknesses mentioned earlier in the report, the British national health service and the system of social welfare are not particularly well-regarded by the French successor generation. Here again, France's results are in total opposition with those around the world (for instance, 23% agree that Britain has a good national health service vs 65% world-wide). The same applies to Britain's commitment to the environment which is seen as being positive by only 40% (vs. 65% world-wide).

British Business

In France and also world-wide, the United States, Japan and Germany are all more likely to be regarded as having many 'world-beating' companies than the United Kingdom. However, unlike the world-wide average which shows France to be behind the UK, the French perceive their own country to be ahead of UK (72% vs. 64% agree).

Women and students are less likely to regard the UK as having many 'world-beating' companies (85% and 80%) than men and professionals (92% for both).

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 %	Disagree %	Neither/nor %
USA	78	17	0	3
Japan	49	37	3	6
Germany	27	55	6	8
France	18	55	13	13
UK	17	47	16	18

Base: All successor generation in France (199)

The USA, once again, leads the field when it comes to being a major financial trading centre (96% agree that it is) but this time the UK follows close behind (90%). The UK is rather better viewed on this dimension than it is world-wide where it is in third place behind USA and Japan. As world-wide, France has the poorest image on this dimension, even among its own countrymen. Just 43% think it is a major financial trading centre; 46% world-wide.

Here again, views between professionals and students differ; while two-thirds of professionals see the UK as a major trading centre, only 43% of students say so.

When it comes to British products and services, the majority of the French rate them as good (61%). Although only one in ten think that Britain's products and services are poor, the 'net rating' (% good minus % poor) of 51% places France's ratings (with Germany) well behind of the world-wide average (78%).

The French have a higher opinion of British management than they do of the workforce generally, following the world-wide results: while 14% think that British managers are 'very good', this falls to 5% in the case of our workforce. However, although on balance, the French regard our management and workforce as good rather than poor, they are - with the Germans - the least favourable of the 13 countries.

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	6	5	14
Fairly good	55	39	40
Neither good nor poor	23	32	24
Fairly poor	8	2	2
Very poor	2	-	-
Don't know	7	22	21
Net good	51	42	52

Base: All successor generation in France (199)

As emerged in the qualitative work, British business people are regarded as very formal but very committed to their work. British business is mainly associated with financial insurance and banking activities. The businessman is described as a sad old man wearing a grey three-piece suit, not likely to take enough risks to be able to compete successfully. However, he works in the City which is seen as one of the major financial trading centres in the world.

He is serious and can work up to 3 hours overtime. But he won't forget that pubs open at 5pm and close at 11.30pm

Snob, smart, well-dressed but believes in fair-play. He is not a good communicator but it probably comes from his education

British Science & Technology

Although the successor generation in France perceives the UK's creativity, innovation, discoveries and advanced technology as one of its key strengths, opinion is divided when specifically asked to rate its scientific and technological innovation. On balance, though, the French are positive: 39% rate Britain positively, as opposed to 31% who are negative.

This places the UK well behind Germany (51%), France (69%), Japan (71%) and the USA (91%). Once again, the UK is significantly worse rated in France (and also Germany) than in the other 11 countries. On average world-wide, 61% think it has a strong reputation for scientific and technological innovation, though this still means it is less well rated than USA, Japan, and Germany (but not France).

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 %	Disagree %	Neither/nor %
USA	61	30	3	5
Japan	25	46	14	11
France	11	58	17	14
Germany	9	42	19	26
UK	3	36	31	29

Base: All successor generation in France (199)

These overall findings in France do not back up the opinions raised in the qualitative research, where research and great discoveries are associated with young countries and so Britain (and even France) were felt too old and seen as wasting their time and money in unprofitable research.

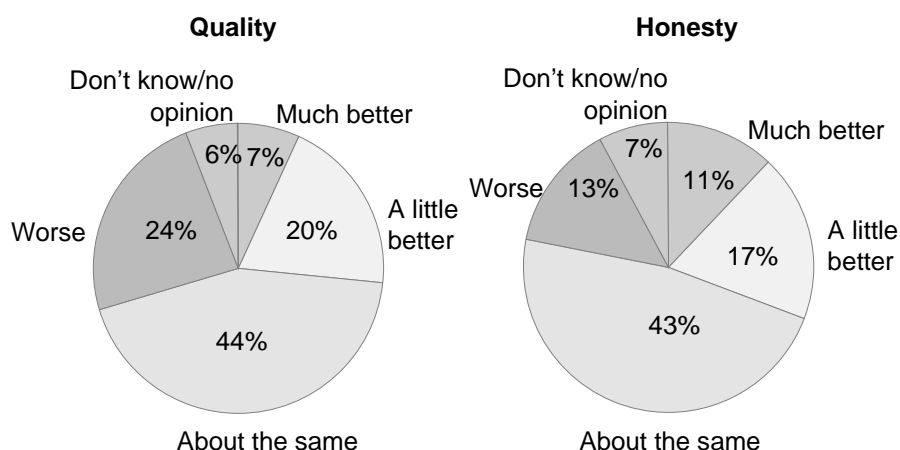
British Media

Members of the successor generation world-wide have a fair amount of scepticism about the media generally. This is demonstrated by the fact that, though only 36% think the British media tells the truth (28% think it does not), it is better regarded than their own country's media both in terms of honesty and quality.

In France, however, British media and French media are equally well regarded in terms of honesty and quality - just short of half think they are the same, while the rest are divided in their views. A little fewer in France also feel that the UK media tells the truth (27% vs 36% world-wide) and the balance of opinion is, marginally, that it does not (34%).

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 France (199)

This could be explained by the findings from the qualitative research: here the French said that all British newspapers do not tell the same stories and there are major differences between reliable newspapers, such as the Financial Times, and tabloids like the Sun. However, they praised the independence and variety of opinion in the British press.

It is a serious press e.g. The Times, equivalent to Le Monde in France. But they also have the 'press people', like in the U.S

They have much more newspapers than we have in France, but they are very gossipy like The Sun. In France, we read more magazines

The press is free and independent. One can find anything and everything

The daily press is much more powerful in Britain, of good quality and much cheaper (than in France)

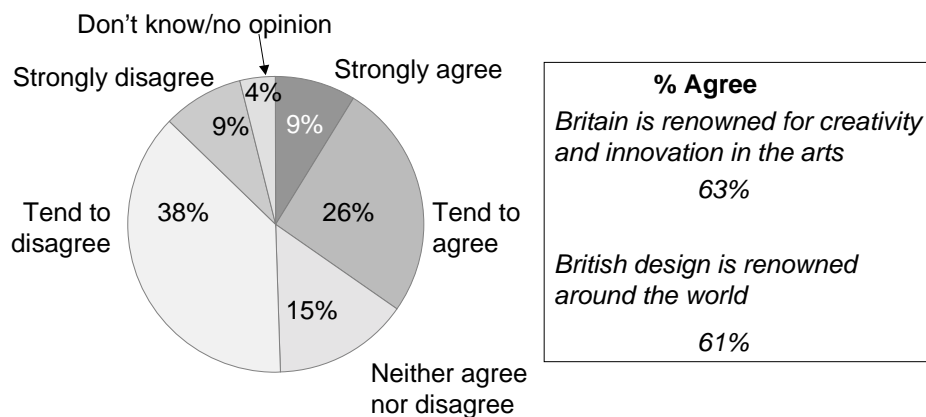
Tabloids are more interested in the sexual scandals. Are the British interested in the politics of Blair or his personal life?

British Art

The French have a rather more positive opinion of British Art than is true among the successor generation world-wide. They are more likely to believe that Britain is renowned for creativity and innovation in the Arts (63% vs 54% world-wide) and that British design is renowned throughout the world (61% vs 49% world-wide). They are also significantly less likely to think Britain's reputation in the Arts is based more on the past than the present (just 35% think it is, while 46% disagree. The equivalent figures world-wide are 66% and 15%).

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 France (199)

This certainly confirms what was found in the qualitative research, where the French associated British Arts with innovation, eccentricity, quality and popularity (British people were perceived to be very receptive to the Arts). 'Elitist' Arts such as theatre were also said to be of good quality.

*Avant-garde, eccentric, mad - who wants to fight the
puritanism and classicism of the British Arts*

*We don't always remember the British Arts but they are
legendary. In the music, we have the Beatles*

When asked to cite contemporary British artists, the French (with the Germans and Mexicans) are more likely to be able to name someone than most of the other countries (on average, over half are unable to come up with a name). Unlike the world-wide results – where Elton John and Hugh Grant are the two most-recognised symbols of British Art - Francis Bacon is the most mentioned artist in France (cited spontaneously by one in ten respondents vs. 1% overall). Elton John follows closely behind (7%), as does John Galliano (6%). The French are more likely to mention designers than any of the countries measured.

Leading British Artists (Spontaneous)

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

Top mentions:	%
Francis Bacon	10
Elton John	7
John Galliano	6
Kenneth Branagh	5
Agatha Christie	5
The Beatles	4
Vivienne Westwood	4
Hugh Grant	4
Don't know	42

All other answers 3% or less.

Base: All successor generation in France (199)

The British music scene fares better than that of Art generally. Despite the fact that many people around the world evidently still regard the Beatles as a contemporary band (and also John Lennon as a solo artist), the proportion of respondents who are unable to name any British pop musicians is only 34%, and just 6% in France, where the Beatles are in first position, mentioned by nearly one-third of the respondents (30% vs. 10% world-wide).

Oasis, Elton John and Texas - definitely more contemporary - follow - cited by one in five respondents. Many of the big names of recent years get a mention. This is confirmed in the group discussions, where the French proved that they certainly know and appreciate British music.

They (the British) have one passion and it is their music

They are specialists. The best bands are the British bands

Leading British Pop Musicians (Spontaneous)

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

Top mentions:	%
The Beatles	30
Oasis/Liam or Noel Gallagher	21
Elton John	21
Texas	20
Rolling Stones/Mick Jagger	14
Spice Girls	9
Blur	8
U2/Bono	8
Don't know	6

All other answers 5% or less.

Base: All successor generation in France (199)

It is encouraging that nearly all of the people mentioned in both the art and pop music categories are, in fact, British. There are one or two American pop musicians and actors (Madonna, etc.) who a small number apparently think of as British.

British Personalities

French respondents were asked which, if any, of a list of 22 ‘celebrities’ they had heard of, which they thought were British, and which would be a positive role model for them personally. With the exception of Robin Williams, all 22 were British.

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	97	95	98
Spice Girls	95	82	86
Hugh Grant	92	68	74
Naomi Campbell	86	24	28
Robin Williams	84	23	27
Richard Branson	78	52	67
John Galliano	70	47	67
Linford Christie	69	50	72
Stephen Hawking	65	32	50
Kate Winslet	53	24	45
Vivienne Westwood	50	33	67
David Hockney	45	25	56
Liam Gallagher	42	36	86
P D James	38	25	66
Rowan Atkinson	30	25	83
William Hague	21	15	71
Tim Henman	20	16	80
James Dyson	15	4	27
Stephen Shaw	14	9	64
Anita Roddick	8	5	62
Damien Hirst	6	2	33
Delia Smith	4	3	75
None of these	1	1	-
Don't know	2	2	-

Base: All successor generation in France (199)

Tony Blair is the most recognised British ‘celebrity’ among the successor generation in France (and around the world), followed by the Spice Girls and Hugh Grant (97%, 95% and 92% respectively). They also are the most likely to be thought of as British (95%, 82% and 68%). Discouragingly perhaps, Robin Williams (the only American in the list) comes in as the fifth most recognised name (84% have heard of him); however, a much lower proportion believe he is British (23%). Here again, designers achieve higher levels of recognition in France than generally world-wide e.g. 70% say they heard of John Galliano in France vs just 27% world-wide .

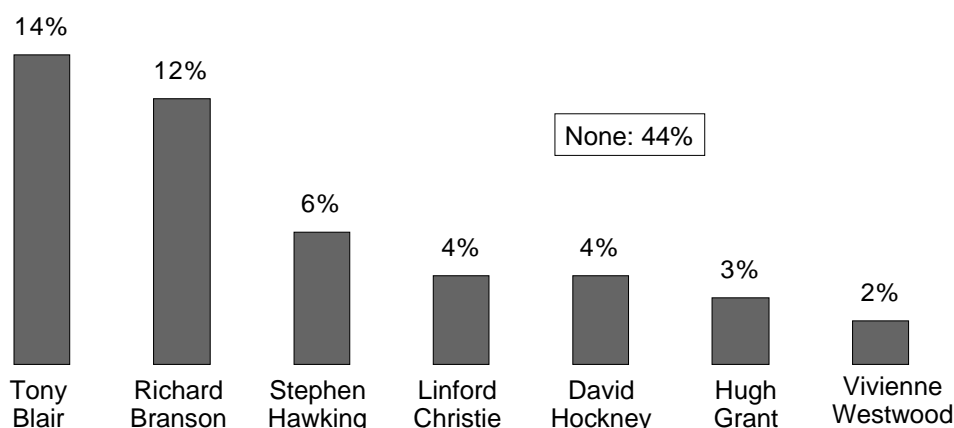
The third column in the table below shows, for each person, the proportion among those who recognise the name, who also know that they are British. Most recognised as British by those who have heard of them are, again, Tony Blair and the Spice Girls, but also Liam Gallagher (second most mentioned British pop musician), Rowan Atkinson and Tim Henman.

It is still Tony Blair who stands out as a potential role model in France as elsewhere around the world. One in seven say that he represents the most positive role model for them personally. Next in line comes Richard Branson (referred to during the qualitative phase as a frank, impertinent but efficient, brilliant, rich, iconoclast and young British business figure!). Two in five (44%), however, feel that none of the 22 names on the list represents a role model for them personally.

As a word of caution, it should be noted that a red herring was inserted into the list - Stephen Shaw from the British Council in the UK. Stephen achieved a 14% recognition factor in France, with two-thirds of these people claiming to know he is British. However, none of them say that Stephen would be their most positive role model. There are two possible explanations for this. It may be that people were thinking of another British person with a similar name (i.e. George Bernard Shaw), or perhaps it is simply a case of over-claiming - 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, as Stephen achieved higher levels of recognition than other genuine British ‘celebrities’ such as Anita Roddick, or Damien Hirst. There is no obvious reason why someone might make up knowledge of Stephen Shaw but admit that they have never heard of Delia Smith.

Role Models

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



Base: All successor generation in France (199)

Britain's Relationships with other Countries

On average, world-wide, Britain is perceived as valuing its relationship with the United States rather more than either Europe or the Commonwealth. In France, the picture is a little different and confirms what has been said earlier in the report: Britain is seen to value its relationship more with the US and the Commonwealth than with Europe. Views of the French are very strong: the qualitative research suggested that they see Britain as an American platform in Europe for American imperialism, and believe that we will consequently have problems in fully integrating in Europe as long as we play this 'double role'. Having said that, they count on Tony Blair - perceived as being in favour of Europe - 'to fight against the American supremacy in the UK'.

The British are the spokesman for the US. Their loyalty is very strong

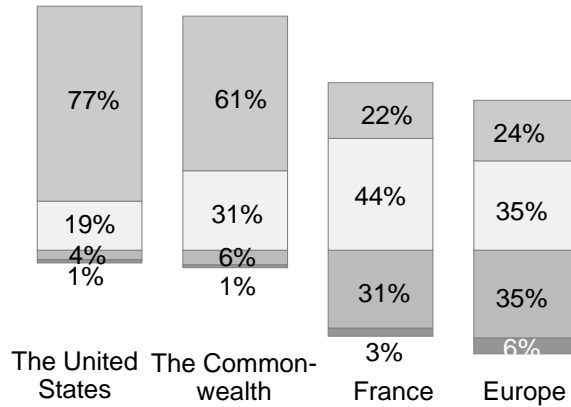
Britain is the door to Europe for the US

In each country where the research took place there is a perception that Britain values its relationships with that country less than with the US, Europe or the Commonwealth. The French successor generation actually believes that Britain values its relationship with France marginally more than with Europe. Even so a third say that Britain does not value its relationship with France; 41% say the same of its relationship with Europe.

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

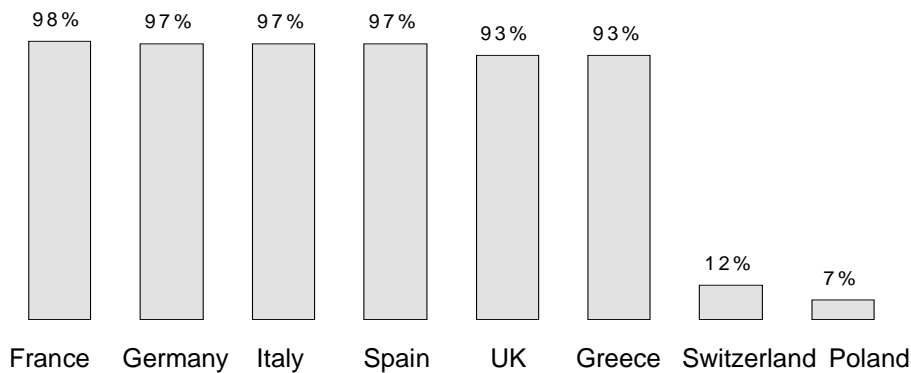


Base: All successor generation in France (199)

As might be expected almost all successor generation in France are aware that the UK is part of the European Union.

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 France (199)

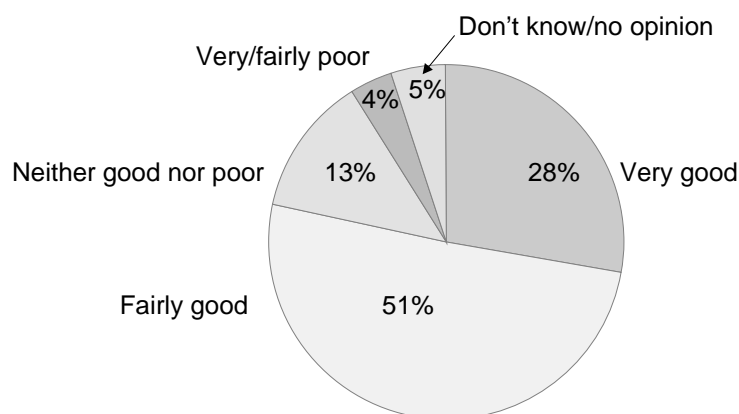
The French (and the Germans) are much more aware of the countries which form part of the EU than other non-Europeans. Nonetheless, a small number are confused about the status of Switzerland and Poland; 12% of the French successor generation think Switzerland is a member and 7% incorrectly believe that Poland is part of the EU.

Education

In line with the opinion world-wide, the vast majority of the French respondents (78%) rate the overall quality of British higher education as good and 28% rate it as 'very' good (while just five per cent rate 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 ?

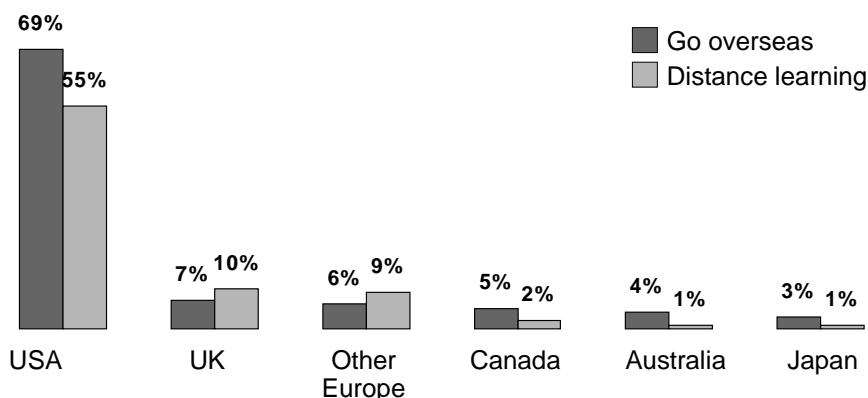


Base: All successor generation in France (199)

Despite this high opinion, it is the United States which is the preferred country to study in, spontaneously mentioned by 69% of the French respondents. The UK is the second choice but only for a minority (7%). Canada, and Australia - in reality our two main rivals for attracting English-speaking students - are not particularly well-regarded achieving 5% and 4% of the choices respectively. The UK, therefore, receives a rather poorer rating in France than it does generally world-wide, where 26% would choose it.

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 France (199)

For distance learning courses, the pattern of choice remains the same, though there is a little greater interest in the UK (10%) and Canada and Australia are even less popular (2% and 1%).

In the qualitative research, British education was definitely praised for its quality, and spontaneously associated with Cambridge and Oxford by the successor generation in France. However, it was also described as the most conservative and, despite its quality, French respondents were concerned about its ethics and elitism.

It is like ENA in France

They are very narrow-minded and austere but can be eccentric. I know Theodore Celting he can be serious but also dandy

Furthermore, it was seen as a machine which provides good citizens whose minds have been shaped to be politically correct, to reproduce what the head of the country wants them to think.

Respondents evoked the American campus to describe the education in the USA, not only a place of knowledge but also a place where one lives all aspects of a student's life; teachers are good and perceived to be dynamic, young, relaxed, and very close to their students. Whereas it was felt possible to interact with American teachers, this was believed to be discouraged in British institutions. A distance learning course could therefore negate many of the advantages which an American institution is perceived to offer, making the British course more attractive in comparison.

They learn History, Arts, Sciences, nothing really practical like in the US where they think business

On the other hand, the United States is, to a great extent, regarded as providing the educational qualifications which provide the most credibility with potential employers for more than two-thirds of the French respondents, more than the world-wide average (58%), leaving a significant gap between the US and the other countries measured. In contrast with the all country figures, the UK fares relatively poorly; indeed, more respondents would opt for France rather than Britain in this area (18% vs. 6%).

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 ?

	France %	World-wide %
USA	68	58
France	18	6
UK	6	23
Japan	2	5
Canada	2	3
Australia	0	2
Don't know	6	3

Base: All successor generation (2,952) - All successor generation in France (199)

There is a general feeling world-wide that the British are themselves well educated. Three-quarters (76%) feel this way, with one in four (23%) going so far as to believe that we are 'very well educated'. The French (and Germans) are much less impressed with our level of education, however; just half of the French successor generation thinks we are well educated and 16% think we are poorly educated.

From the group discussions it emerged that British education was seen as of good quality for fields like literature, but not directly linked to the economic and social realities of the country.

Level of Education in Britain

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

	France %	World-wide %
Very well educated	5	23
Fairly well educated	45	53
Neither well nor poorly	30	17
Fairly poorly educated	15	4
Very poorly educated	1	1
Don't know	5	3

Base: All successor generation (2,952) - All successor generation in France (199)

Languages & the English Language

Other than their own native French, English is the most widely spoken language among the successor generation in France (for 97%), marginally more than the world-wide average (91%). This probably explains why one of Britain's key strengths for France is thought to be its language.

In France, the proportion who can also speak German is nearly three times as many as the average world-wide (58% vs. 22%; this figure rises to 89% among the 20-24 years old and 73% among the students, and falls to 20% among the older age group). Similarly, the French are more likely to speak Spanish than all the other countries measured, bar those in Latin America (36% vs. 16% on average world-wide). Chinese and Japanese remain the least-spoken languages for France (2% and 6% respectively).

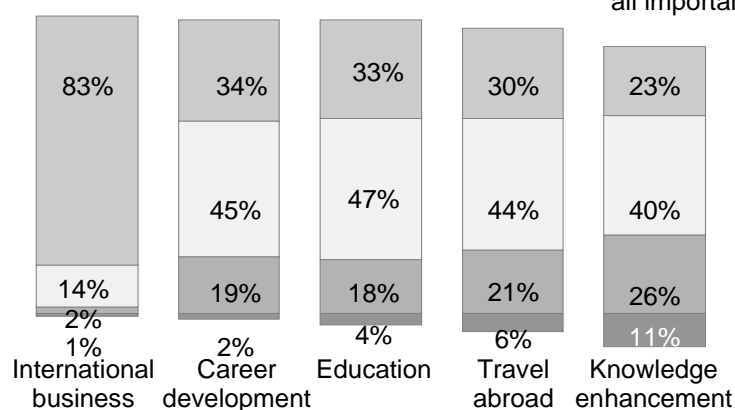
World-wide, French is the language which most respondents would like to speak, with almost half nominating it as the language they would like to learn. One in three (29%) nominate German, while one in four (26%) would prefer to speak Spanish. Around half (5%) of all those who do not currently speak English would like to do so.

In France, Spanish is the language which most respondents would like to speak (36%). Significant proportions - around one in five - also nominate Chinese and Japanese as the languages they would like to learn.

Importance of English Language

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

■ Crucial ■ Very important ■ Fairly important ■ Not very/not at all important



Base: All successor generation in France (199)

As is true world-wide, among the French respondents, the ability to speak English is seen as important whether it is for international business, education, travelling abroad, career development or knowledge enhancement. It is felt particularly crucial for international business (83% think it crucial).

Sources of Information about Countries

Among members of the French successor generation, a variety of sources are used to find out about other countries. The most popular is the local press, cited by more than three in five. Around two in five mention visiting the country personally and international press, especially among women and those aged between 30 and 35 years old, while men are more likely to refer to the local press. French students are more likely to look for information in books (43% vs. 28% overall).

However, the one most influential source is to visit the country personally for one-fourth (26%) of the French successor generation, followed closely by the local press (24%). Indeed, most (94%) claim to have visited the UK at least once and nearly half have visited our country at least five times; only 5% say they have never visited it, being the lowest figure of all the countries measured. Indeed, three in five members of the successor generation world-wide have never been to the UK. But France has a significant advantage over the other countries measured, its proximity to the UK, and access through the channel tunnel and the European agreements regarding the travelling of people between the members of the EU.

Thinking specifically about the United Kingdom, the local press remains the most important source for 46% of the French respondents. The British press is also a key source for one-third, although the BBC World TV and the BBC World Service do not fare as well, mentioned by 12% and 7%, similar proportions to the all country results. For some reason, none of the French mention visiting the UK as a source of information, despite the fact that 94% have done so. Maybe they take this as read.

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.**

	Most Imp.	Single Imp.	UK
	%	%	%
Local press	61	24	46
Visiting the country/the UK personally	37	26	0
International press	37	6	22
People who have visited that country/the UK	28	10	20
Books	28	7	19
Word of mouth - friends & family	27	6	11
Local TV news	26	3	16
Local radio	17	1	7
Know people from that country/the UK	16	4	17
Media (press, TV, radio) from that country	14	2	n/a
Word of mouth - work colleagues	13	3	10
Films	10	1	11
International TV	10	1	6
Tourist authorities from that country/in the UK	9	3	3
Other local TV	6	0	0
International radio	4	0	1
Other official (UK) sources from that country	1	0	0
British press	n/a	n/a	34
BBC World TV	n/a	n/a	12
BBC World Service	n/a	n/a	7
Other	1	1	1
Don't know	0	6	3

Base: All successor generation in France (199)

Implications

Overall, views of Britain in France are fairly positive. The French are fairly objective in their comments and acknowledge the fact that the UK is a strong political and economical power. But the main issue remains its integration into Europe and its dependence and close partnership with the US, sometimes perceived as a betrayal. As long as the British position on Europe is not clarified – encouragingly, Tony Blair is perceived as a pro-European - the French opinion about the British will not change. In addition, they still associate us with tradition and conservatism – seen as a major weakness - rather than innovation, although they recognise that we can be creative, especially in the Arts.

British society

British society is thus more likely to be seen as traditional than modern. British people are regarded as being less expansive and communicative than their French neighbours, sometimes as ‘double dealing’ people (acting more the way they think they should rather the way they want to).

The positive aspects of our society are our democratic government and multiculturalism; therefore, we tend to be regarded as racially tolerant and, on balance, welcoming toward foreigners, though a significant minority are critical (30%) on the latter issue. Furthermore, we tend not to be associated with sex discrimination.

However, the French members of the successor generation certainly do not believe that we are a classless society. In addition, our national health service and our system of social welfare are poorly regarded, both important aspects for French society.

Encouragingly, two-thirds of the French respondents believe that Britain values in relationship with France.

British Business

French views on British business are generally positive, but, with the exception of financial services, less positive than is true world-wide. Thus, countries like the US and Japan, and even Germany, are well ahead of us. The quality of our products and services are fairly well rated (although below the world-wide average). Business people are regarded as being very formal but committed to what they do. British business is mainly associated with financial services – the City is said to be one of the major financial trading centres in the world after the US – but also conservatism and being too cautious when it comes to taking risks and innovation. Consequently, this places us after the US, Japan, Germany, and France in terms of perceptions of our level of innovation in science and technology.

British Art

This is the area where our creativity and innovation are most recognised in France, especially in terms of popular music. Views are significantly more positive in France than world-wide and our Art is believed to be renowned for its creativity and innovation. It is also very encouraging that more than two-thirds of the French say that British design is renowned around the world. World-wide, our reputation in the Arts is felt to be based more on the past than the present; not so in France, where more disagree with this (46%) than agree (35%).

British Education

British education is highly rated but lags behind the US in terms of being the preferred place to be educated overseas or via a distance learning course. In this respect, British education performs less well than it does across the 13 countries generally. Furthermore, only a few say that Britain provides the educational qualifications which provide the most credibility with potential employers. Here again, British education – often associated with Cambridge and Oxford – is described as being very conservative and elitist.

Our language is seen as one of our main strengths. Almost all the French members of the successor generation speak English. Speaking English is seen as important as for international business, travel but also education, career development and knowledge enhancement.

How to Communicate with the French Successor Generation

People use a wide variety of information sources when finding out about other countries and that includes visiting the country personally and going through the international press. When it comes to the UK specifically, the French are more likely to concentrate on the local press and the British press, but also the international press and people who have visited the UK.

In terms of potential role models to communicate these messages, Tony Blair stands out: he is the most high profile British personality and, importantly, the most likely to be deemed a role model by the successor generation in France.

MORI/ 11927

*Janette Henderson
Andy Martin
Fabienne Obadia*

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 199 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
199	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% ±
199 vs. 199	5.9	9.0	9.8
199 vs. 97	10.7	16.3	17.8
58 vs. 37	12.5	19.1	20.9

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