

Attitudes Towards Britain and the British – Year II

South Korea

**Research Study Conducted for
the British Council**



May - June 2000

Contents

Preface	2
Summary of Findings	5
Familiarity and Favourability with Key Countries	5
Images of the United Kingdom	6
United Kingdom's Strengths & Weaknesses	9
British Society	11
Education	15
British Business	18
British Science & Technology	22
British Personalities	24
British Art	26
British Media	27
Britain's Relationships with other Countries	28
Languages & the English Language	30
Sources of Information about the UK	31
Visiting the UK	33
Implications	34
Appendices	

Preface

This report contains the findings of a survey conducted for the British Council by Market & Opinion Research International (MORI) among a group defined as the ‘successor generation’, in South Korea. This forms part of a project which took place in 17 countries between January and June 2000. The first wave of the study was conducted between May and August 1999 in 13 different countries.

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 the UK’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 our image and ways to improve/re-shape it
- to provide ‘credible evidence’ of attitudes towards the UK and their variation by country

This year, the main survey covered the following countries:

Argentina	Hungary	Nigeria
Bangladesh	Italy	Pakistan
Czech Republic	Japan	Singapore
Greece	Kenya	Spain
Hong Kong	South Korea	Thailand

In addition, independent projects were carried out in the United Arab Emirates, and Vietnam. Although not British Council ‘Priority One’ countries, these results have been added to the overall figures throughout this report and in the tables provided separately.

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). These people are generally, however, aged between 24-40, well-educated, and either studying for a post-graduate qualification or employed in government/industry on a fast-track to the top. The definitions used in each country are appended to this document. In South Korea, the definition used was:

- Aged 24-38
- Professionals graduated from one of South Korea's leading universities and employed in middle executive positions by major companies, government departments, banks or media
- Entrepreneurs developing own businesses in IT related fields
- Students in Masters Degree or PhD courses

Methodology

The survey was conducted in two phases, carried out in parallel, including a qualitative phase and a quantitative phase; the qualitative part of the research consisted of two **focus group discussions** in South Korea. Fieldwork took place on 10th and 12th May 2000 in Seoul. Groups were moderated by an experienced researcher with MORI's research partner in South Korea.

The objectives of this phase 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 the extent to which there is an overlap between the British Council's strategic objectives and perceptions of the successor generation

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.

The **quantitative stage of the survey** was undertaken among 200 members of the same target audience. Interviews were conducted face-to-face in Seoul. Fieldwork took place between 4th May and 1st June 2000. Quotas were set to ensure that a reasonable cross-section of the successor generation was interviewed.

Report Layout

This report will concentrate on the South Korean results, and compare them to those recorded world-wide. 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

Like most countries around the world, the United States is the country that the successor generation in South Korea is most familiar with; half say they know at least a fair amount about it (49%). Japan (43%) is the second best known country among South Koreans.

In contrast, awareness of the UK, Germany and France in South Korea is the lowest among the 17 countries researched this year. Respondents are more likely to say that they know almost nothing about these three countries (25%, 31% and 25%, respectively, feel this way).

As might be expected, those who have visited the UK are more likely than average (35% vs. 16% respectively) to feel they know the UK ‘very well’ or ‘a fair amount’.

Nonetheless, among those who know at least a little about them, it is the UK, Germany and France that achieve the highest favourability levels: at least half of respondents have a positive opinion of France (60%), Germany (57%) and the UK (49%).

Few people are unfavourable towards the UK (10%). Older respondents i.e. those aged 31-38 (59%) are the most likely to say that they are favourable towards the UK.

In contrast, a quarter of respondents do not regard the United States in a favourable light, while Japan achieves its worst favourability rating among the 17 countries (37% hold a negative opinion of Japan).

It was clear from the group discussions that South Koreans do not have a particularly high opinion of American society as a whole. It is thought to be a very competitive environment to live in, which lacks human interaction and is very individualistic. In contrast, South Koreans feel closer to the British society which is thought to be caring and religious. The British society is also said to be “stable, peaceful and well organised, as it has been through history”.

English are similar to oriental people in caring for other people

Student

Britain has a strong tradition in Catholicism

Professional

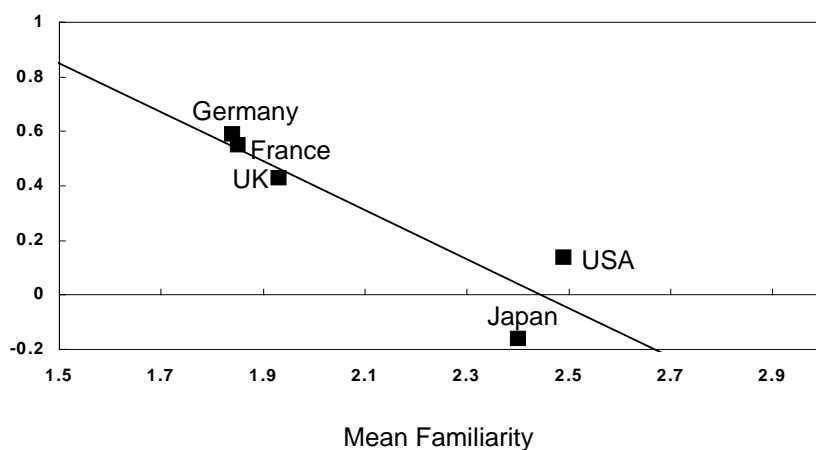
Compared to us, they would have less corruption and irregularity. There would be more transparency

Professional

The chart below shows overall familiarity (on the horizontal scale) and favourability (on the vertical scale) towards the five key countries. The further to the right a country is, the better it is known, while the higher up it is, the more favourable people are towards it. As can be seen, in South Korea, people are more likely to be positive to countries they know the least.

Familiarity & Favourability Towards Countries

Mean Favourability



Base: All successor generation in South Korea (200), May - June 2000

Source: MORI

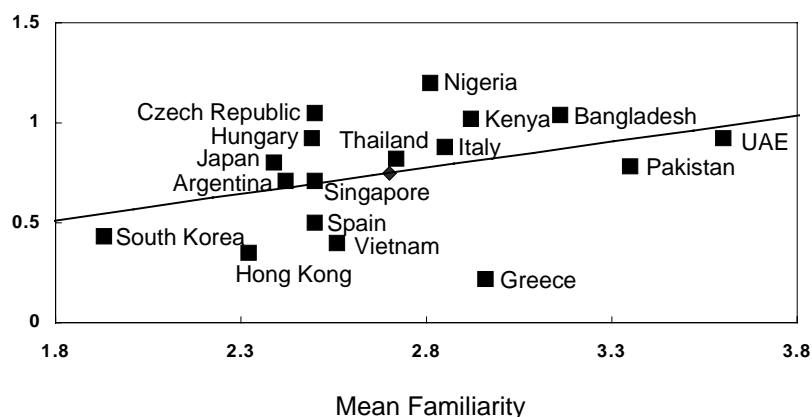
The chart opposite shows how familiar and favourable towards the United Kingdom each of the participating countries are. The top right (most knowledgeable and favourable countries) - Nigeria, Bangladesh and Kenya - are all former colonies, which evidently retain a degree of affection for the UK.

The chart also clearly demonstrates the relatively low familiarity that South Koreans have with the UK. In none of the other 16 countries is the UK less well known.

Despite knowing the least about the UK, favourability in South Korea is higher than in Greece, Hong Kong or Vietnam.

Familiarity & Favourability Towards the United Kingdom

Mean Favourability



Base: All successor generation (3,505), January-June 2000

Images of the United Kingdom

Scotland and England are the two most recognised nations within the UK in South Korea. When asked which countries make up the UK, Scotland is cited by 84% and England 83%; they are followed by Northern Ireland (73%), while a much smaller proportion spontaneously names Wales (53% compared to 67% world-wide).

Just 1% of the successor generation say, without prompting, that the United Kingdom is the same thing as Great Britain and 11 respondents do not know which countries constitute the UK, perhaps because it is simply not a term which is often used in their own country.

As found overall, images of **England** among the successor generation in South Korea focus on the monarchy and football: 8% (19% world-wide) mention the Royal Family, while another 11% refer to the Queen. A similar proportion spontaneously mentions football (18%).

Scotland also creates the same associations in the majority of people's minds as it does in the 17 countries measured this year (and the 13 last year): the traditional outfit, which includes the bagpipe (30%), the kilt (25%), and whisky (18%) are all cited by more than one in seven respondents. Other images are mentioned by less than one in twenty respondents.

Images of violence and conflict dominate South Koreans' perception of **Northern Ireland**, as world-wide: a third mention violence and religious war (34% world-wide), while a quarter cite the IRA/Sinn Fein – only 1% think of the peace process. However, 15% have no image at all.

Wales is the UK country which is most likely to draw a blank. Indeed, the successor generation in South Korea is far more likely to say they have no image of **Wales** than the other countries surveyed (48% vs 16% world-wide). Nonetheless, around one in ten mention football (8%) and the Prince of Wales (8%).

Images of UK Countries (*unprompted*)

Q16-19 What one image best sums up to you ?

<u>Scotland</u>	%	<u>Northern Ireland</u>	%
Bagpipes	30	Violence/religious conflict	34
Kilts	25	IRA/Sinn Fein	24
Whisky	18	Cold/rainy weather	5
Braveheart	4	Scenery	4
Scenery/landscapes	3	Football	4
Football	3	Greenery/green fields	3
Nothing	3	Nothing	15
<u>England</u>	%	<u>Wales</u>	%
Football	18	Football	8
The Queen	11	Prince Charles/Prince of Wales	8
London	9	Castles	5
Royal Family	8	Royal Family	4
Bad/grey weather	7	Rugby	4
Buckingham Palace	6	Sheep	3
Houses of Parliament	4		
Powerful economy	4		
Tradition/conservatism	3		
Gentlemen	3		
Colleges	3		
Nothing	6	Nothing	48

All other answers 2% or less

Base: All successor generation in South Korea (200), May – June 2000

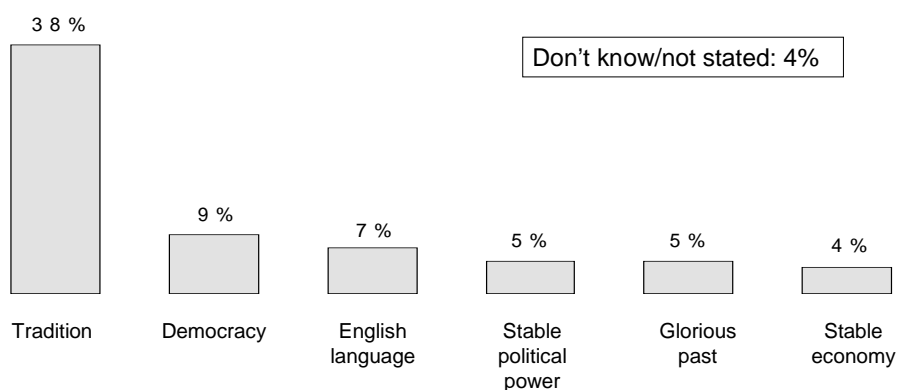
United Kingdom's Strengths & Weaknesses

As in 1999, tradition is regarded – world-wide - both as the UK's major strength, and its main weakness. It is the most cited strength in 6 of the 17 countries participating in the survey this year. This is particularly the case in South Korea. Two in five (38% - highest score among all countries measured) see it as a strength, no other aspect of the UK is mentioned by more than one in ten respondents as a strength.

When we combine different responses (e.g. glorious past), traditional features are mentioned by two in five respondents (44%) as our major strength. In addition to our tradition, culture and heritage, around one in ten also cite the fact that we are a democracy (9%), and our language is universally spoken (7%). However, only 1% say that we find our strength in the multiculturalism of our society.

The United Kingdom's Major Strengths (Spontaneous)

Q32 What do you think is the United Kingdom's one major strength ?
(Top answers)



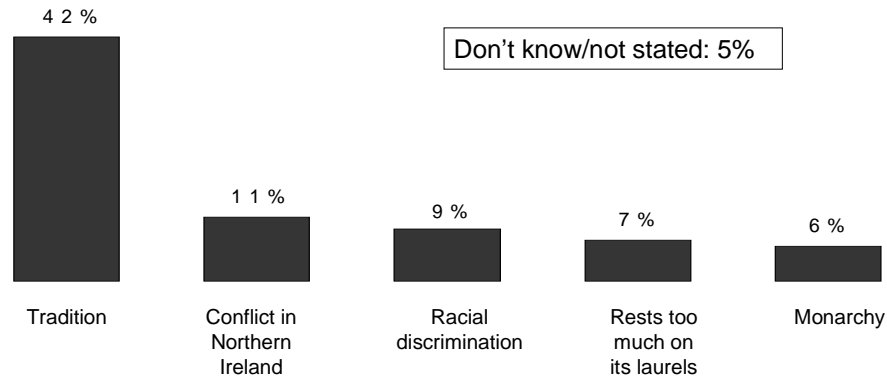
Base: All successor generation in South Korea (200), May - June 2000

Source: MORI

Again, tradition predominates as a major weakness - two in five also see tradition as our major weakness (42% vs 19% world-wide), while one in ten respondents spontaneously cite the conflict in Northern Ireland and racial prejudice (9%) as the UK's other major weaknesses.

The United Kingdom's Major Weaknesses (Spontaneous)

Q31 What would you say, overall, is the United Kingdom's one major weakness? (Top mentions)



Base: All successor generation in South Korea (200), May - June 2000

Source: MORI

Tradition and conservatism are certainly characteristics of the UK society that emerged from the qualitative work. For South Koreans, these two aspects of our society are synonymous with a “well organised” and “stable” nation. These aspects were particularly appealing to the group of professionals who long to live in a more relaxed and comfortable environment, as opposed to the very competitive environment they live in. In contrast, the students were more attracted by the US, which is felt to offer more opportunities and less stress.

There would be many opportunities open to the people who make efforts. They could get rewards to some extent

Student

I do have the image that the country is very comfortable and a good country to live in. I would like to live there when I am old

Professional

The reason that I chose the USA is that there are certain expectations for each age of either men or women in Korea. In one's 20s, one should go to university, in one's 30s, one should get a job and have home and in one's 40s, one should be the owner of his business, something like that. If he or she doesn't follow those, he or she gets stressed very much. But in the USA, if there is a person who is in his 40s and has no job but is satisfied with what he is, people don't care. In the USA, I could live following what I really want, which would make me happy

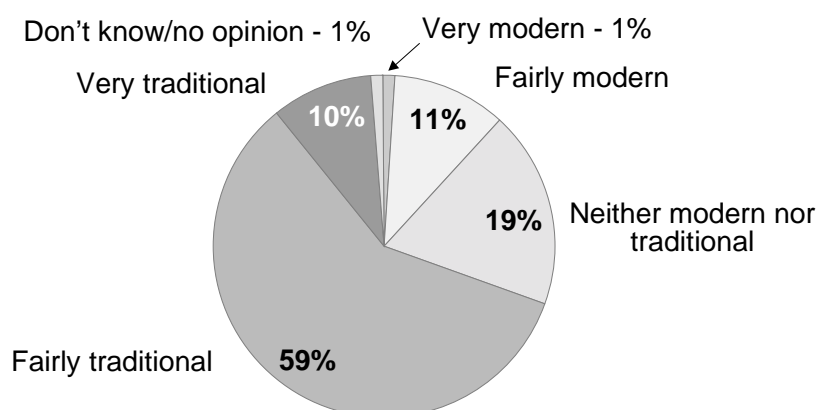
Student

British Society

Views in South Korea are very clear-cut on whether we are a traditional or modern society: two-thirds (68%) of respondents regard the UK as a traditional society, with 10% describing it as 'very traditional'. In contrast, only one in ten say that we are modern. Of the 17 countries measured, South Korea is among the least likely to regard the UK as being modern (12% vs. 36% world-wide).

British Society: Modern vs Traditional ?

Q20 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 South Korea (200), May - June 2000

Source: MORI

The most positively rated aspect of British society in South Korea is our democratic government. Almost three-quarters (72%) agree that it is a good example, while 20% 'strongly' agree.

Men, professionals and respondents aged between 31 and 38 years old are more likely to agree that we have a democratic government.

The British decision-maker was certainly highly praised in the group discussions: he is felt to be a man of virtue and credibility, who leads his country in the right direction while offering stability. However, British citizens are perceived to not be interested in politics because of the current political stability; rather, they are felt to be more involved in their own community's issues than national ones.

The British leader would receive respect and would have a high reputation as a man of virtue

Professional

British people are conservative. Therefore, they expect their leaders to be clean with their private life

Student

British people are indifferent because they are settled, so, unless there is a big issue or one that would harm them, they do not care because the nation is working well

Student

Local autonomy is developed in the UK

Student

South Koreans tend to regard the UK as being very environmentally conscious, with 65% believing this to be true. The UK's institutions also tend to generate positive comments: around half are positive towards the NHS and the fact that the legal system ensures that everyone gets a fair trial (52% and 47% agree, respectively).

The more social aspects of our society are not as well regarded: two-thirds are critical of the (perceived) class-ridden nature of our society (68%), while around half do not believe we are racially tolerant (58%) or welcoming to foreigners (46%). Furthermore, only one quarter thinks that we are truly “multicultural”.

However, only 13% believe that we discriminate against women, while 47% say that we do not.

Indeed, in the focus groups it was felt that the British are not particularly racially intolerant but are more likely to hold an ‘arrogant’, superior attitude towards those from other races, especially Asians.

I don't know if it goes as far as discrimination but it seems that, nevertheless, they would not welcome the Asians

Professional

There is racial discrimination in UK but that is caused by the fact that they are proud of themselves and their country; that is more a sense of superiority than discrimination

Student

In almost all the group discussions, some participants believed that if they were to visit Great Britain, we would not welcome them with any great enthusiasm. (This is in contrast to their own country – virtually all those taking part in the focus groups claimed that their society was particularly welcoming to overseas visitors).

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.**

	Strongly agree	Tend to agree	Neither /nor	Disagree	Mean score*
The British system is a good example of democratic government	20	53	22	6	% +0.86
Britain is committed to protecting the environment	8	57	26	6	% +0.68
Britain has a good national health service	10	42	30	4	% +0.67
The British legal system ensures that everybody gets a fair trial	5	42	33	14	% +0.38
British society is truly 'multicultural'	3	22	33	41	% -0.23
British people are very welcoming towards foreigners	3	14	34	46	% -0.36
Women are discriminated against in Britain	2	12	34	47	% -0.44
British people are racially tolerant	1	11	29	58	% -0.59
Britain is now a 'classless' society	2	6	23	68	% -0.78

* Mean score calculated on a scale of +2 ('strongly agree') to -2 ('strongly disagree')

Base: All successor generation in South Korea (200), May – June 2000

Yet, it was felt that, although it might take a while to break down our barriers, if you could make friends with a British person, you have a true friend, who will go out of their way for you.

In the case of Britain, you would be discriminated against when you first meet them

Professional

The British would be less friendly at first but, after you get to know them, there would be a lot more human affection

Professional

However, it was also felt that the British community is very harmonious and homogeneous. The British are therefore felt to be less likely to create discrimination and racial prejudices than the Americans.

British have a lot of human affection; living on an island, they have a lot of merits. I could see the gentleness and warmth that they have

Professional

Racial discrimination is there but, of course, Americans do not express it externally, but you frequently look at how they talk and behave, you can feel it

Professional

Even though the British people don't like the situation, they comprehend that other people grow up and live in their country and they observe good manners

Student

Nonetheless, there are felt to be class distinctions in the UK. Yet despite these divisions the British people are felt to live in harmony because they have grown up within the rules and regulations of society and know how to deal with one another.

Though there is clear differentiation between classes and differentials of wealth in the UK if viewed from outside, oddly enough, there is less conflict resulting from discords between the wealthy and the poor

Student

When I see their dispute in the parliament, they look like they are joking, unlike hot-tempered people in other nations yelling with their blushed faces

Student

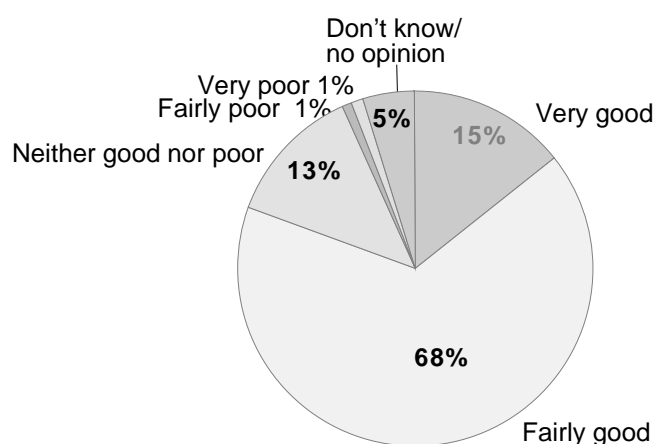
Echoing the qualitative research, only 8% of South Koreans agree that Britain is now a 'classless' society, while 12% feel that British people are racially tolerant.

Education

Our higher education is particularly highly regarded among the successor generation in South Korea: four in five respondents (82%) feel that the quality of the British higher education system is good, while 15% say it is 'very' good. Just one per cent believe it to be 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 South Korea (200), May - June 2000

Source: MORI

Although people rate the quality of our higher education system highly, a lower proportion (although still a clear majority) describe the British people as 'well educated'. However, only 3% think the British are poorly 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?

	%
Very well educated	6
Fairly well educated	59
Neither well nor poorly	30
Fairly poorly educated	3
Very poorly educated	0
Don't know	4

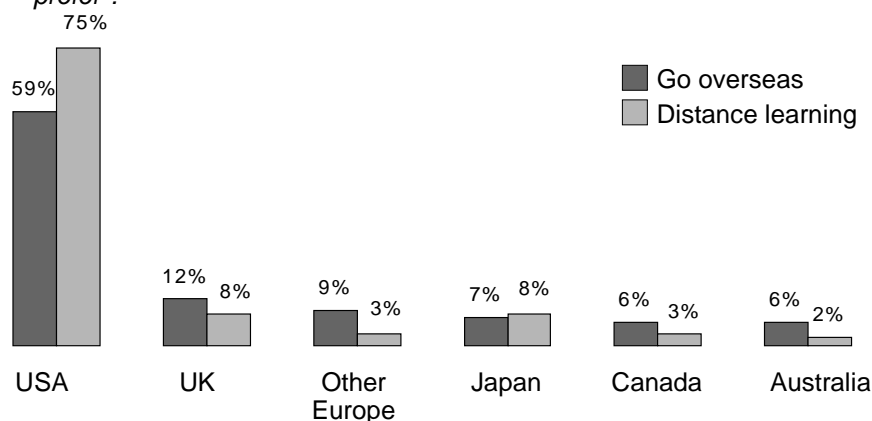
Base: All successor generation in South Korea (200), May – June 2000

Only one in ten (12%) South Koreans (vs. 46% world-wide) would choose the UK as a country for studying overseas (lowest score among the 17 countries), while the large majority would prefer to study in the United States (59% vs. 27% world-wide). 'Another country in Europe' is the third choice (9%).

The US is even more strongly preferred for distance learning courses. Three-quarters (75% vs. 32% world-wide) say that they would choose a distance learning course from the United States, compared to only 8% who would opt for a course based in the UK. Courses from Japan are preferred by a similar proportion, while another European country is only preferred by five respondents. Again, the South Koreans are least likely to choose a UK-based distance learning course than any other researched country.

Preferred Countries for Education (Spontaneous)

Q7 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 South Korea (200), May - June 2000

Source: MORI

In the focus groups, the British teacher was seen as being a man in his fifties, who is traditional, extremely knowledgeable, and who enjoys teaching, but is someone who does not encourage discussion or interaction. It was felt that he would teach traditional subjects like philosophy, literature and history:

He adheres to classic studies rather than modern sciences

Student

He would be loyal to his principles

Professional

Respondents also felt that the typical British teacher does not question what he is teaching and does not want any of his students to do so. It is interesting to note that some students felt that they would not be welcomed and that we are not open to foreign students. They actually felt a bit reluctant to study in Britain because of this. Some also said that our traditional way of teaching is rather out-dated, as are the subjects we are being taught.

UK is not open to foreign people in comparison with the US; if I go to the UK to study, British educators will not treat me as they do with the British students. But in USA, if the student is competent, they admit him and try to foster the student

Student

No class cancellations, no fun, and he would just give his lecture and leave

Professional

Although the system is well organised in the UK, I feel like they are out of date. British educators deny changes so they are old-fashioned and inferior to Americans in this respect

Student

Knows much but not good at teaching A scholar rather than a professor

Professional

American education, in contrast, was seen to have a more liberal image, which is more appealing, especially to the students. The teacher is pictured as young, “slim” and “lean”; he likes interacting with students and pushes them hard to achieve their goals; he teaches applied sciences such as IT and business administration.

They teach under a liberal atmosphere

Student

He would sit on a desk while lecturing and would make eye contact with the students

Professional

If I were to mention a typical American teacher who appears in a movie, I would mention “Dead Poet Society”. If I were to think of a typical English teacher, I would mention the teacher in “The Full Moon”

Professional

The strong regard for the American system of higher education is emphasised by the fact that 81% of respondents feel that a qualification from the United States would have the most credibility with potential employers. A small minority would say the same about the UK (7%).

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 ?**

	%
USA	81
UK	7
South Korea	1
Japan	5
Canada	3
Australia	1
Don't know	4

Base: All successor generation in South Korea (200), May – June 2000

Only 1% would say the same about South Korea. Overall, the image of Korean higher education is rather negative. It is seen as being bureaucratic and authoritarian.

We look at our professors, they seem to aggressively want power

Professional

Our country seems to be the most extreme (in terms of authoritarian), then Britain and the US

Professional

British Business

Out of five countries measured, the UK is ranked fourth in terms of whether or not it has many world beating companies, both world-wide and in South Korea. Although 50% of respondents agree that this is the case, only 6% 'strongly agree'. In contrast, almost all members of the successor generation believe that the United States has many world-beating companies (82%, 'strongly' agree), 44% think the same of Japan (i.e. strongly agree), 20% of Germany.

Singapore and Japan also have a low belief in the UK's ability to produce world-beating companies, while Hong Kong and Vietnam, although still below the all country average, are more positive (23% and 20% respectively 'strongly agree').

The United Kingdom overtakes Germany and France to be the third most likely country to be regarded as a major financial trading centre. Again, however, the United States (69% 'strongly agree') dominates, followed by Japan (22%). One in five members of the successor generation (19%) think the same of the UK, while a further 46% tend to agree. Around one in ten (14%) respondents do not think that the UK is a major financial trading centre.

World-beating Companies

Q4 **Please tell me the extent to which you agree or disagree that has many 'world-beating' companies.**

	Strongly agree	Tend to agree	Disagree		Mean score*
USA	82	17	1	%	+1.79
Japan	44	49	2	%	+1.34
Germany	20	61	5	%	+0.97
UK	6	45	18	%	+0.37
France	6	41	18	%	+0.34

* Mean score calculated on a scale of +2 ('strongly agree') to -2 ('strongly disagree')

Base: All successor generation in South Korea (200), May – June 2000

In the focus groups, respondents found it hard to think of any concrete images of British businesses. However, due to the overall impression of tradition and long history of Britain, British businesses were more likely to be associated with the manufacturing sector - from steel to textiles to charcoal - or with medium and small family businesses. In contrast, American businesses were more likely to be perceived as in profitable and modern industries such as finance, IT, insurance and automobiles.

They (British) look like maintaining businesses that have already been successful

Student

IT, security or financial industries are more representative of business in the US

Student

British companies were generally thought of in the focus groups as very trustworthy, and good to do business with, but not nearly so competitive or successful when compared with American companies. It was felt that the British businessman wants to succeed but also enjoys his life. In contrast, Americans are seen as very ambitious and eager to make as much money as possible.

*They (Americans) don't have enough time for even lunch;
they look very busy eating hamburgers*

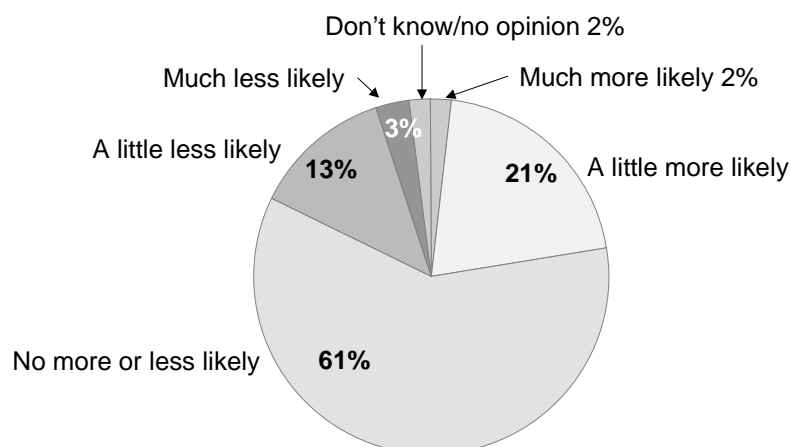
Student

Around the world, the UK retains a very strong reputation for producing quality goods and services, thought by 55% to be of better quality than those produced in other countries. However, for the successor generation in South Korea, British products and services are believed to be about the same as those produced in 'other countries' in terms of quality and value for money (51%). The remainder are divided in their views: a quarter (23%) feel that British products and services are better value for money, while a similar proportion (26%) feel they are worse.

Reflecting this neutral stance, three in five (61%) say that knowing a product or service is British has no impact on their purchase decision. However, one in five (23%) say that they are more likely to buy a product or service if they know it is from the UK, while 16% say they are less likely to do so.

British Products and Services

Q29 Knowing that a product or a service is British, does it make you more or less likely to choose to buy it, rather than a similar product or service from another country?



Base: All successor generation in South Korea (200), May - June 2000

Source: MORI

Nonetheless, in the focus groups the quality and durability of our products were certainly felt to be better than that of American products; the Americans are perceived to be better at producing consumable products than we are, while Korean products are thought to be the worst of the three.

If I were to buy something expensive that I need to use for a long time, I would buy a European product. And, if I were to buy something I need to replace after a few years, I would buy an American product. If I were to buy something cheap, I would buy a Korean product

Professional

British managers tend to be a little better regarded than our workforce. However, South Koreans appear to be far less positive about British managers and the workforce than some of the other researched countries. Overall 44% rate British managers as good (vs. 69% world-wide), while just 4% think of them as poor. Similarly, 34% rate the workforce as good (vs. 54% world-wide), while one in ten rates them as poor.

Perceptions of British Business

Q30 **And taking your answer from this card, how do you perceive ...**

a) **the British workforce ?**

b) **British management ?**

	Workforce	Management
	%	%
Very good	3	6
Fairly good	32	39
Neither good nor poor	52	46
Fairly poor	9	4
Very poor	1	0
Don't know	5	6
Mean score*	0.29	0.48

* Mean score calculated on a scale of +2 ('very good') to -2 ('very poor')

Base: All successor generation in South Korea (200), May – June 2000

In the focus group, British workers were regarded as good, solid employees, but a little inflexible and not necessarily outstanding. Although they are thought to have a good relationship with their employers, they are not perceived to be very motivated and it is felt that many even encourage strikes. Furthermore, they are not seen to be as ambitious as American employees.

They would only do what they have been instructed to

Professional

They won't think of starting a business themselves and doing their own business to earn a lot of money. They will just live on the salaries they are being given

Professional

Their labour protests are also severe

Professional

British Science & Technology

In terms of its reputation for scientific and technological innovation, the UK is ranked fifth out of five countries (44%), well behind the American leader (96%, 72% ‘strongly’ agree), the Japanese (86%), Germany (77%) and France (49%). However, respondents are more likely to be undecided (41%) than disregard us in this respect (14%).

Scientific and Technological Innovation

Q5 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		Mean*
					score
USA	72	24	1	%	+1.67
Japan	45	41	5	%	+1.25
Germany	26	51	3	%	+1.00
France	8	41	14	%	+0.43
UK	5	39	14	%	+0.35

* Mean score calculated on a scale of +2 (‘strongly agree’) to –2 (‘strongly disagree’)

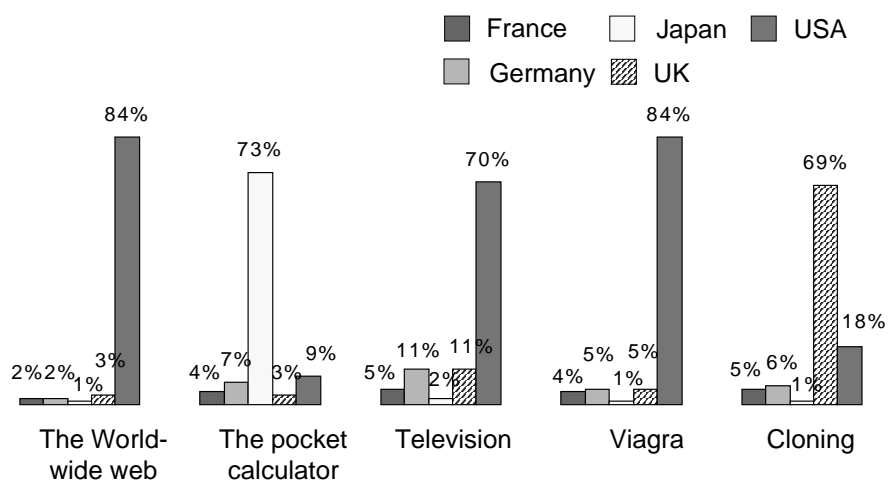
Base: All successor generation in South Korea (200), May – June 2000

The overall lack of knowledge about British involvement in technological breakthroughs is clearly demonstrated when respondents are asked from which countries they think that certain twentieth century inventions emanated. Reinforcing its perceived supremacy in the scientific field among South Koreans, the United States is assumed to have been responsible for the majority of these discoveries: world wide web (84% vs. 3% for the UK), Viagra (84% and 5%) and television (70% vs. 11% for the UK), when all these are actually of British origin. The Japanese are clear favourites for having invented the pocket calculator (73% vs. 9% for the USA and 3% for the UK) – the only one of the five tested which is, in fact, American.

The only technological breakthrough which people associate with the UK is cloning – 69% know that this was invented in this country, although 18% assume it is an American invention.

Inventions - Country of Origin

Q6 I am now going to read out a number of inventions from this century. I would like you to tell me in which of the countries on this card you think they were invented.



Base: All successor generation in South Korea (200), May - June 2000

Source: MORI

The message of British involvement in important scientific inventions and discoveries is clearly not getting through. Indeed, it was felt in the focus groups that the British are poor marketers, with people assuming that there is ample public funding for theoretical scientific research in the UK. The focus groups also revealed a clear image of a rather old British scientist who is passionate about his research, working on some detailed theoretical subject, within no timeframe and with little or no interest in its practical value.

Once he looks at a thing he would look at it all his life, going until the end, with others wondering why he is doing this

Professional

He is not restricted by time and thinks profoundly about what he seeks, but he doesn't seem to seek money

Student

In contrast, American scientists are seen as younger, and tend to be closely linked to new technology. American scientists are also believed to be driven by the profit making potential of anything they are working on, in complete contrast to the perception of a scientist from the UK.

Internet is mostly related with money. America is doing well with the Internet, but we have not seen any British sites on the Internet

Professional

They would work on applied sciences, focusing on projects that make money

Student

Even though the discipline is high-tech, I do not get the image that the researcher wears denim jeans and rides motorcycles; in the case of Americans, if somebody works on genetic engineering or computer science, that image can be connected

Professional

Evidently this poor marketing even goes as far as the origin of the invention itself, and even the scientists involved – among those who have heard of him, just 42% know that Stephen Hawking is British!

British Personalities

Unlike most countries in the world, Tony Blair is not the best known British personality in South Korea. Despite our muted reputation among South Koreans for scientific and technological innovations, Stephen Hawking is recognised by more people in South Korea (97%) than any other country around the world. However, less than half this proportion know that he is British. Naomi Campbell (93%) and Tony Blair (92%) are the next best known British personalities.

The Spice Girls, who are the second best known British personalities around the world, are only ranked fifth.

Film stars (84%, Hugh Grant; 64%, Steve Martin; 51%, Kate Winslet), are clearly more likely to be recognised than people in other walks of life, although designers (John Galliano and Vivienne Westwood) achieve recognition by around one in five respondents. William Hague achieves his highest recognition levels in South Korea than in any other country this year (38%), though only a quarter know he is British.

As might be expected, there are differences between the sexes with regard to recognition levels – men tend to be more likely to recognise sports people, while women have higher recognition levels for film stars and designers. In this case, people with experience of the UK do not have higher levels of recognition than others.

The fact that people have heard about these personalities does not necessarily mean that they know they are British. Among those who know of each person, Tony Blair achieves the highest 'I knew they were British' factor, at 92%, some way ahead of the Spice Girls (75%) and Hugh Grant (69%), the next best known to be 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 %
Stephen Hawking	97	42	43
Naomi Campbell	93	24	26
Tony Blair	92	85	92
Hugh Grant	84	58	69
Spice Girls	80	60	75
Steve Martin	64	10	16
Kate Winslet	51	25	49
William Hague	38	10	26
John Galiano	23	5	22
Vivienne Westwood	21	7	33
Linford Christie	18	6	33
Rowan Atkinson	14	8	57
Liam Gallagher	11	3	27
Tim Henman	10	6	60
Richard Branson	9	4	44
David Hockney	9	3	33
James Dyson	8	2	25
Anita Roddick	3	1	33
Damian Hirst	3	1	33
P D James	2	0	0
Delia Smith	2	1	50
Firzana Perveen	2	0	0
None of these	0	3	-
Don't know	0	2	-

Base: All successor generation in South Korea (200), May – June 2000

As a word of caution, it should be noted that two red herrings were inserted into the list – Steve Martin, the American actor, and Firzana Perveen from the British Council in the UK. Steve is recognised by 64% of respondents, while just 16% of those who know of him think that he is British. Firzana achieves a two per cent recognition factor with none of those people claiming to know that she is British. This is in contrast to last year, when another British Council employee – Steven Shaw - was added onto the list, and achieved higher recognition than several ‘genuine’ personalities, including William Hague. Despite Steven’s globe-trotting exploits, this year’s results appear to indicate that people simply felt that he had a familiar-sounding (and British) name, so that they assumed they knew of him. In turn, this might mean that British personalities with less typical names might struggle to achieve that recognition factor.

British Art

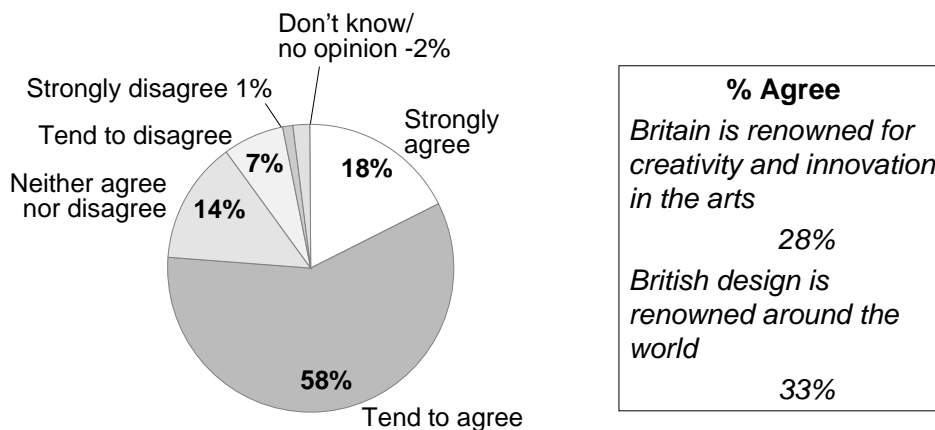
Three-quarters of respondents (77%) believe that Britain's reputation in the arts is based more in the past than the present. In fact, one in five (18%) 'strongly' agree, while just 8% disagree with this idea.

Echoing the above, the successor generation is more likely to disagree than agree with the idea that Britain is renowned for creativity and innovation in the arts: while 28% of respondents agree this is the case, 37% disagree.

However, opinion is equally split when it comes to judging British design: one-third believe that British design is renowned around the world, while a similar proportion say this is not the case.

British Arts: Modern vs. Traditional ?

Q21 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 South Korea (200), May - June 2000

Source: MORI

Most of the focus group participants identified British art with traditional forms, such as theatre (Shakespeare was the most frequently mentioned artist), literature, painting and classical music.

The British artist was highly regarded as was his work, which is felt to be of exceptional quality, even if not commercially viable. In contrast, it was felt that the American artist is 'born to make money', is envied and admired and is in a modern industry, such as music or movies.

I see a British artist as wonderful, but I want to be an American artist because I can gain wealth and also a certain position, if not respect

Student

Modern for America and classical for Britain

Professional

They are respected in the UK but are more popular in the US and make more money

Student

In Britain, the word “respect” would be appropriate, but in America, the words “admiration” and “envy” would be more befitting

Professional

British Media

Almost half of the respondents (48%) believe that the British media can be relied upon to tell the truth. However, one in ten question its honesty.

American newspapers would not publish lies but compared to the British ones, a broad range of diverse and free opinions would be published

Professional

Participants in the focus groups felt that British media is tailored according to what editors feel the general public should know or what is seen to be socially acceptable.

In the UK, they have a Royal Family and if the news is detrimental to them, the contents will be altered by the outside pressure or patriotism

Student

The British publish things that the public should know about. The Americans publish what the public wants to know about

Professional

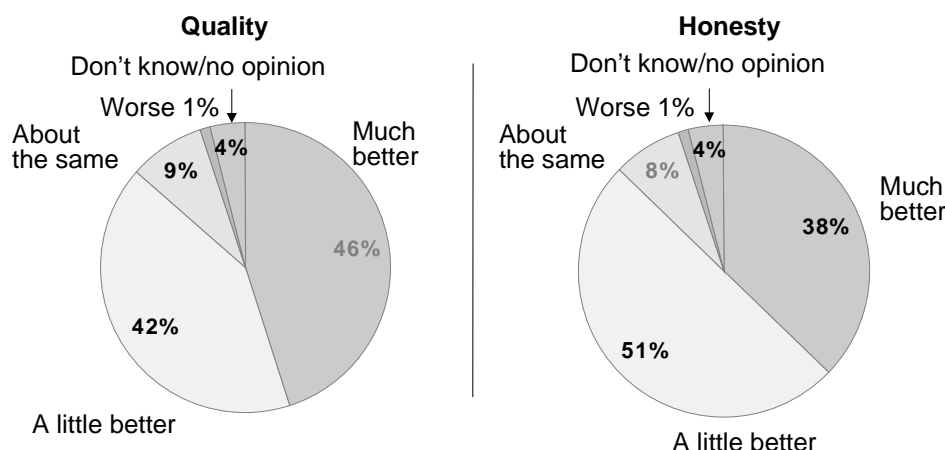
Respondents also felt that the British media is very traditional. Indeed, articles, although thoroughly written, are felt to be somewhat boring and not as informative as the American ones, which cover a wide variety of subjects.

Hardly anyone rates the honesty of the South Korean media above that of those based in the UK: nine in ten respondents say that the British media is more honest than the South Korean media, while 38% say it is ‘much’ better than the latter.

The quality of the British media among the successor generation is highly regarded. The majority (87%) think that the British media offer better quality than those in their own country, while only 1% think the opposite. In fact almost half (46%) regard the quality of British media as ‘much better’ than their own.

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 South Korea (200), May - June 2000

Source: MORI

In contrast, Korean newspapers were felt to be very political. Indeed, rather than delivering the facts, they were felt to be very subjective.

Even when dealing with economics, it is ultimately related to politics

Professional

Even when they are writing social articles, there is a political background. We don't know why these articles appear

Professional

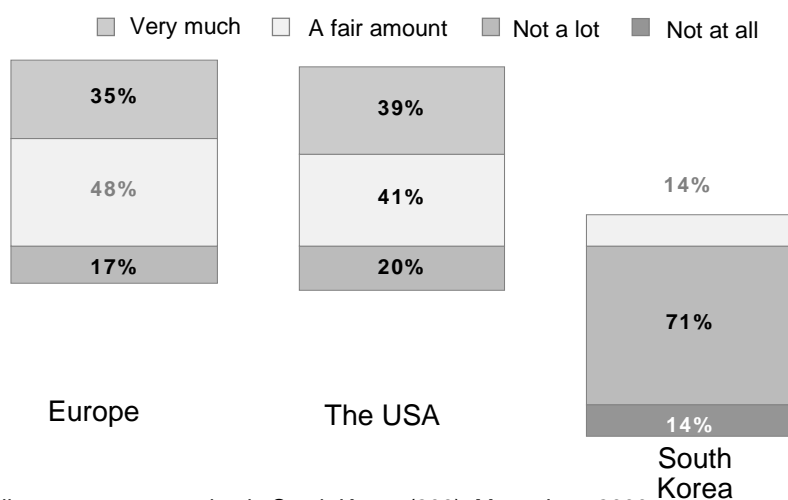
Britain's Relationships with Other Countries

There is a clear perception that Britain places more value on its relationship with Europe (83%) and the United States (80%) than South Korea (14%). Around two in five respondents believe that Britain values its relationship with Europe and the US ‘very much’, while none say that we do so with South Korea.

Interestingly, those in European countries, are less likely to feel that Britain places very much value on its relationship with its continental neighbours, than countries from other parts of the world. In none of the countries where the survey took place this year do respondents believe that we place more value on our relationship with them individually than we do on our relationships with either the United States or Europe. Only 14% say that we value our relationship with South Korea.

Relationships Between Countries

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



Base: All successor generation in South Korea (200), May - June 2000

Source: MORI

Most participants in the focus group discussions highlighted a feeling that Britain tends to keep itself to itself. Unlike the United States, we are not perceived to get involved in things which do not necessarily concern us, which tends to be regarded quite positively. But in contrast to the other countries surveyed, this isolationism is not perceived to stem from a feeling of superiority through our colonial past.

Owing to the characteristics of an island nation, UK is a closed society. Because the UK need not be sensitive to peripheral countries like us and they don't have the power to move other countries, they don't care

Student

Americans regard international politics as their domestic politics

Professional

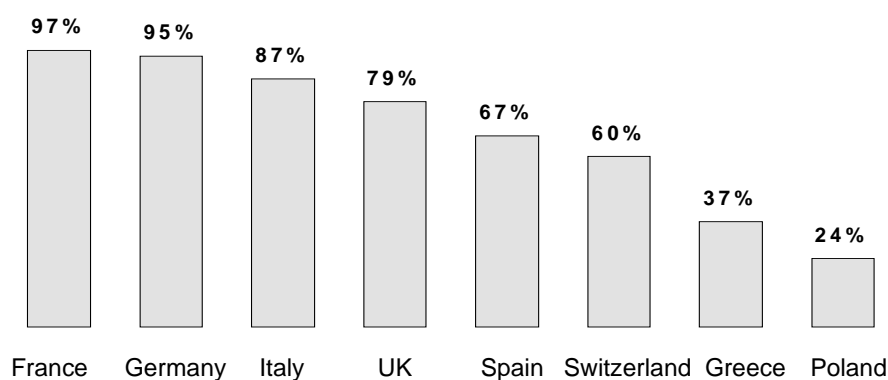
The European Union

The UK is the fourth most-recognised member of the European Union, behind France, Germany and Italy. All achieve between 97% and 79% recognition. Spain (67%), and Greece (37%) lag some way behind, with a significant proportion - 60% - also under the impression that Switzerland is an EU member.

However, fewer, two in five, believe that Britain plays a leading role in the European Union, with only 7% agreeing 'strongly'. On the other hand, more than one-fifth do not believe this to be the case.

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 South Korea (200), May - June 2000

Source: MORI

Languages & the English Language

Almost all members of the successor generation in South Korea (93%) speak English; Japanese comes second with 26%, while around one in ten say they can speak German, and 2% say the same about Chinese.

Around the world, French is the language which most people say they would like to learn (47%), followed by German (29%), Spanish and Japanese (both 22%), and Chinese (13%). In South Korea, as perhaps might be expected, around two in five would like to speak Japanese (40%) and Chinese (36%), while 18% are willing to learn French.

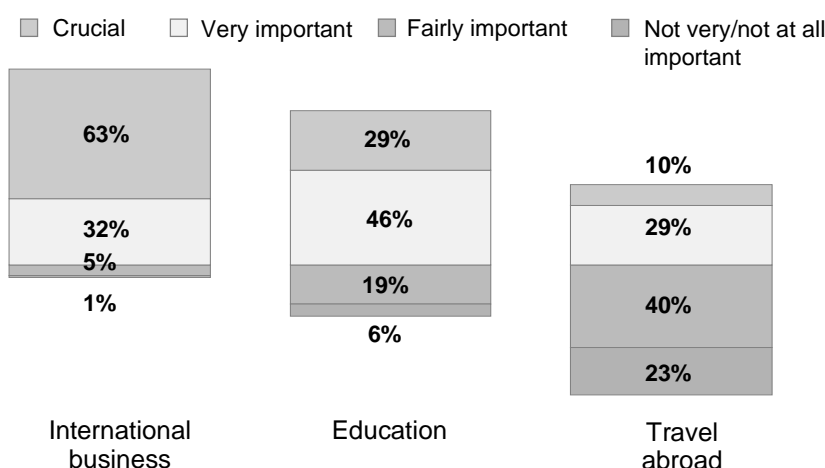
The most important perceived use of English is for international business, where 63% of respondents consider it to be 'crucial', and a further 32% think it is 'very important'. Few respondents (1%) think that English is 'not very' or 'not at all' important in this respect.

Similarly, more than nine in ten respondents (94%) think that English is either crucial (29%) or very important (46%) for education (either domestically or overseas). Just six per cent do not consider English to be important for education.

The least important use of English is perceived to be for travel abroad, but even here 39% consider it to be crucial or important, while a further 40% think it is fairly important. However, a quarter of respondents think of English as not important; this is perhaps not surprising since South Korea is not known for generating large numbers of independent travellers. Indeed, only 20% of the successor generation in South Korea has visited Britain.

Importance of English Language

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



Base: All successor generation in South Korea (200), May - June 2000

Source: MORI

Sources of Information About the UK

Local media are the most cited sources of information among members of the successor generation, when forming an opinion about the UK. The national TV news (57%) and the local press (45%) are the most commonly mentioned sources of information.

Given the high opinion of our media, 23% say they rely on them, mainly BBC World TV (20%), while only 3% say BBC World Service on the radio.

The internet, books and films are also felt to be important sources of information among one in seven respondents.

Sources of Information About the UK (*unprompted*)

Q33 **Please tell me which two or three sources of information are most important when forming an opinion specifically about the United Kingdom.**

	%
National TV news	57
Local press	45
BBC World TV	20
Internet	18
Books	16
Films	15
People who have visited the UK	10
Word of mouth - friends & family	8
Visiting the UK personally	7
Other international press	5
Other international TV	5
Academic sources	4
British press	4
BBC World Service	3
Know people from the UK	3
Word of mouth - work colleagues	3
Embassies/consulates	3
Local radio	2
Tourist authorities from the UK	1
Other official UK sources	1
Other international radio	0
Other	2
Don't know	1

Base: All successor generation in South Korea (200), May – June 2000

Participants in the focus groups felt that the national media, particularly TV, is both an influential and major source of information. Others said they rely on friends who live abroad (in the US or Britain) or who have had some experience of travelling to these countries. However, some participants felt that some of the stories they had heard might have been somewhat embroidered.

We see teachers in USA and in UK mostly through TV and generally they are males

Professional

I hear many stories from friends. But the stories are very subjective. Sometimes, there are exaggerations and they are very emotional. So, either I don't believe in them or believe only 50%. But the credibility of publicly recognised media such as newspapers and broadcasts, since they are edited, goes up to 80% or 90%

Professional

Visiting the UK

One in five South Koreans have visited the UK, nearly all on only one occasion. This is among the lowest mean number of visits to the UK among the countries measured this year (just behind Vietnam and Thailand, and alongside Kenya).

A total of 17% of respondents have been to the UK for one visit, with a further 4% having been here on two occasions or more.

Among those who have been to the UK, the majority - 55% - has done so between two and five years ago, while only a quarter made their last visit less than two years ago. However, one in five (18%) made their last visit more than five years ago, which will undoubtedly have an effect on their perceptions of our society.

Most of those people who have been to the UK have stayed for a while: 57% of previous visitors have stayed in the UK for more than two weeks at a time. Two in five (43%) of those who have made a longer visit have been to the UK for a long holiday, while three in ten have spent two weeks or more on study or work visits.

Implications

The successor generation in South Korea has a limited awareness of the United Kingdom, having the lowest overall familiarity with the UK among the 17 countries measured this year. Few have first hand experience of Britain, with South Koreans having made among the lowest mean number of visits to the UK per respondent (0.28 visits per person).

Furthermore, they also have few perceptions of the country and specifically of British life. Not surprisingly, this has had an effect on the way that impressions have been formed about the UK, with South Koreans more likely to rely on the more traditional, and perhaps more stereotypical images of the UK.

Indeed, as in most countries around the world, favoured images of the UK include bagpipes and kilts in Scotland, football and the Royal Family in England, violence in Northern Ireland, while almost half have no image of Wales at all. Furthermore, other images are mentioned by less than 10% of respondents.

Nonetheless, the successor generation has a high opinion of the UK. Specifically, two main aspects of the UK's society are thought to make it a good place to live: our past and our perceived stable and well-organised community. These aspects are attributed to tradition, conservatism and religious fervour. Furthermore, South Koreans believe that British people are more 'human' (like themselves) than American people.

Other aspects praised by the South Koreans include:

- The British Government, felt to be a good example of a democratic government
- The quality of our education
- The honesty and quality of the British media (particularly the BBC)
- Our decision-makers, said to be reliable and strong
- Britain's reputation in the arts, felt to be more traditional than modern

However, for many our tradition is also felt to be our downfall. It would appear by having a traditional lifestyle it is felt that we are not moving forward fast enough to appeal to the younger generation, with some even suggesting that we are stagnating.

When I compare the three countries, UK is a mature country, the US is in a growth period and Korea is in the middle

Student

Indeed, the United States emerges as the country much hallowed by this same generation for being at the cutting edge of technology, as well as for its education, and 'world-beating' companies.

This may be partly explained by the fact that South Koreans, as in most countries around the world, appear to be more knowledgeable about the US (as result of media, especially television coverage) than they are of the UK.

Yet, despite this positive attitude towards the United States, it would appear that many South Koreans do not have a high opinion of Americans. Indeed, the successor generation in South Koreans regard the United States far less favourably (37%) than they do the UK (49%).

Many believe they lack human interaction, are very materialistic and are too ambitious and eager to make as much money as possible.

*In my opinion, British people make much of value itself
either in art or in science. They do because they like it. But,
as for USA, they do art or science to get something out of it*

Student

Conclusion

Impressions of countries, and particularly the UK, are very much influenced by the media, especially the television. Furthermore, many (48%) believe the UK media can be trusted. Therefore, this source should be exploited to communicate a more modern and vibrant image of our society. Currently, it is felt our programs convey an outdated image of our society which is thought to be rather dull and boring. In contrast, the Americans project a 'flamboyant' image of creativity.

MORI/ 12648

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Appendices

Statistical Reliability

Topic Guide

Topline Results

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% ±
200	4.2	6.4	6.9
100	5.9	9.0	9.8
50	8.4	12.8	14.0

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% ±
150 vs. 50	9.7	14.8	16.1
100 vs. 100	8.4	12.8	13.9
100 vs 50	10.3	15.7	17.1
50 vs 50	11.9	18.1	19.8
50 vs. 25	14.6	22.4	24.4

Topic Guide

Introduction – 5 mins

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 South Korea. Each of the three communities is meant to encompass EVERYTHING about that country to you.

PART A – THE PEOPLE

10 mins

So to start us off, I'd like you to tell me 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 Korean community? And in the American community?

And, within the same community, how do the people relate to each other?

Imagine the British community. Is this community united? Do the people live in harmony? Do they support and respect each other? IF NOT, ASK Why not?

PROBE FOR: Is there any discrimination e.g. between ethnic groups, or between men and women?

And what about the Korean community? How does it compare with the British community?

And in the American community?

PART B – HIGHER EDUCATION

10 mins

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 Korean 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?

PART C – BUSINESS

10 mins

Now I'd like to move on to thinking about businesses in each of the three countries, so continuing to use the community 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 British business-people work for? (*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 Korean community?) Describe its management and workers.

Are its products/services of good quality? Why?/Why not? In what ways are the British business's products/services better or worse than those produced by the Korean business?

What about the American business - what does it do? How are the American business's workers and managers different to their Korean 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 Korean business?

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

What are the particular strengths of the British business? The American business? The Korean business?

PART D – SCIENCE & TECHNOLOGY

10 mins

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 Korean scientist?

Turning now to new technologies, would you say that the British community is very innovative? In which areas? ASK FOR Internet, medicine How does it compare to the American community? What about the Korean community?

PART E – THE MEDIA

10 mins

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 Korean 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?

PART F – ART

10 mins

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 **the Arts** (not necessarily someone who paints). When you think of someone in the Korean 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 ?

PART G – DECISION-MAKER

10 mins

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 Korean 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 ?

PART H – INTERNATIONAL RELATIONSHIPS

5 mins

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 ?

OVERALL IMPRESSIONS

5 mins

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 ?

SOURCES OF INFORMATION ABOUT BRITAIN

10 mins

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? PROMPT – Business trip, holidays, studies...

What source(s) of information has been the most valuable when you looked for some information about Britain? PROMPT: magazines, newspapers, programmes on TV/radio, Internet, friends, travel agencies... holidays, studies, business trips

What do you think are the things which have most influenced your impressions of Britain ? Why? PROMPT: holidays, studies, business trips, magazines, newspapers, programmes on TV/radio, Internet, friends, travel agencies...

How else have you found out about Britain ?

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