

Attitudes Towards Britain and the British

Malaysia

**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 Malaysia. This formed part of a project which took place in thirteen countries around the world.

Background and Objectives

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

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

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

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

Brazil
China
Egypt
France
Germany

India
Malaysia
Mexico
Poland

Russia
Saudi Arabia
South Africa
Turkey

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

In Malaysia, the definition used was people aged between 22 and 35 who are university educated. These 'wider well-informed' members of the 'young public' have particular interests in Britain which are stimulated by large-scale initiatives, such as arts events, conferences, the World Wide Web and tourist information.

These individuals are also at an early stage in their careers in education, culture, media or the private sector.

Methodology

The survey was conducted in two distinct phases, beginning with two **qualitative focus group discussions**. The groups were held in Petaling Jaya and Kuala Lumpur on 12th May and 13th 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 Malaysia. In each case, they were moderated by an experienced researcher with MORI Malaysia.

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 Malaysia, this was undertaken among 200 members of the same target audience. Interviewing was conducted face-to-face in June-August 1999 .

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 on the Malaysia 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

The United States is the country which most members of the successor generation in Malaysia feel they know 'very well' (18%) or 'a fair amount' (54%). The United Kingdom is the second best known of the countries cited (61% know it at least 'a fair amount'), followed by Japan (40%). This contrasts with the world-wide figures, where Japan is by quite a way the least well-known of the five countries tested. France and Germany remain something of a mystery to the Malaysian successor generation, with four out of five saying they know 'just a little' or 'almost nothing' about these countries.

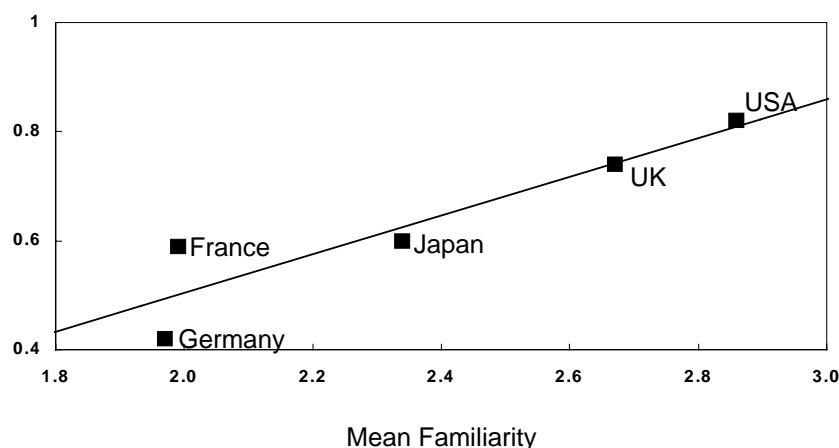
Not only is the United States the country which people feel they know best, but it also achieves the highest favourability rating. Sixty-nine per cent of all respondents rate their attitude towards the United States as 'very' or 'mainly favourable'. The United Kingdom achieves a similar favourability rating (65%), whilst Japan's is somewhat lower at 54%. Although people are less familiar with France and Germany, the favourability of these two countries is relatively high (43% and 31% respectively). Yet, compared to the world-wide figures, overall favourability of France and Germany is poor in Malaysia.

The female successor generation in Malaysia does not know any of the five countries as well as the men. On the other hand, higher educated people, and those who have visited the UK, tend to know all of the countries better than other groups. This does not, however, effect the favourability of these groups towards each country.

The chart overleaf 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. The chart shows that in Malaysia, familiarity does tend to build favourability. Indeed, as we have seen, the USA is both best known and regarded. The UK is a little less familiar than the USA, and Malaysians are slightly less favourable about our country.

Familiarity & Favourability Towards Countries

Mean Favourability



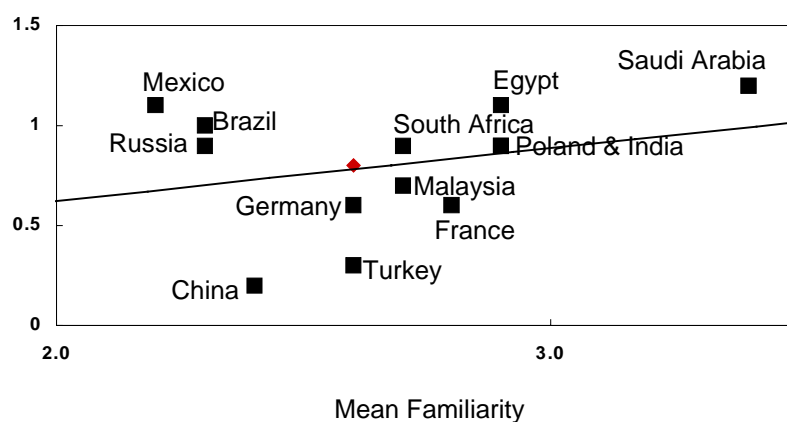
Base: All Malaysian successor generation (200)

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

The chart below compares the United Kingdom findings in Malaysia with the results from the other 12 countries. The diamond represents the average for the 13 countries. Of the 13, the Malaysians are in a fairly middling position. They have a slightly higher than average position with regard to familiarity, although they are slightly less than the average in terms of favourability.

Familiarity & Favourability Towards the United Kingdom

Mean Favourability



Base: All successor generation (2,952)

Images of the United Kingdom

As might be expected, England is the most recognised nation within the UK, identified by 87% of the successor generation in Malaysia. This is followed by Wales (83%), Scotland (82%) and Northern Ireland (76%). Compared to the other country findings, Malaysians are one of the most informed nationalities regarding the composition of the UK, despite the fact that more also spontaneously say that the UK is the same thing as Great Britain.

In contrast to the world-wide results, Beefeaters/the Tower of London is the most spontaneously recognised image of **England** (nominated by 39% of the Malaysian successor generation). In joint second place is football for men (19%) and The Royal Family for women (24%). The Houses of Parliament/Big Ben (9%), red phone boxes (6%), red buses (5%) and Margaret Thatcher (5%) are also fairly strong images.

With regard to **Scotland**, highlands/mountains are a far stronger symbol than anything else for the Malaysian successor generation (cited by 59%). Far fewer respondents in all of the other countries surveyed link Scotland with this image (for example, Germany is in second place at 33%). The influence of the British landscape also arose in the focus group discussions. While one participant commented on the 'beautiful country which is nice for a vacation', another said that it is 'romantic' and is 'a good place for a honeymoon'.

Landscape features also symbolise **Wales**. Castles and mountains are both key images (each cited by 20% of the Malaysian respondents). Sheep, Cardiff and rugby are also popular symbols, although the latter is by no surprise mentioned more by men than women. In contrast to the other countries surveyed (a notable exception is India), not one single respondent associates Wales with The Royal Family. Wales is also less likely to draw a blank in the Malaysians' minds, with only 15% unable to think of an image compared to 25% world-wide. This is not a surprising finding as Malaysians are more likely to recognise Wales as part of the UK in the first place.

Paralleling findings from elsewhere across the globe, **Northern Ireland** conjures up an image of violence and conflict. Fifty-six per cent of the Malaysian successor generation offered this image, nearly four times as many as the next popular ones (scenery for women and the peace process for men). Malaysians are also more likely to associate Northern Ireland with violence and conflict than the other countries surveyed (for example, the world-wide average is 37%).

Images of UK Countries (Spontaneous)

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

(Top answers)

Scotland	%	Northern Ireland	%
Highlands/mountains	59	Violence	56
Kilts	14	Scenery	15
Braveheart	12	Peace Process	9
Cold/wet weather	7	Religion	6
Islands	2	Guinness	3
Nothing/don't know	4	The Giants Causeway	2
		Nothing/don't know	9
<hr/>		<hr/>	
England	%	Wales	%
Tower of London/Beefeaters	39	Castles	20
The Royal Family	18	Mountains	20
Football	15	Sheep	16
Houses of Parliament/Big Ben	9	Rugby	10
Red phone boxes	6	Cardiff	9
Red buses	5	Coal mining	4
Margaret Thatcher	5	Male voice choirs	3
Black cabs	2	The Valleys	3
Tony Blair	2	Daffodils	2
Nothing/don't know	0	Nothing/don't know	15

All other answers 1% or less

Base: All successor generation in Malaysia (200)

Britain's Strengths & Weaknesses

Encouragingly, 66% of the Malaysian successor generation do not think that the United Kingdom has any weaknesses or cannot spontaneously think of any. At the same time, however, it is disappointing that 59% are unable to identify any strengths. It is no surprise that those who have visited the UK are rather more able to offer an opinion.

The Malaysian successor generation who cite a major weakness (a group which includes nearly all the respondents with Masters, doctorates or MBAs) believe that the United Kingdom is traditional, conservative, inflexible and not in favour of innovation (8%). The country is also believed to be snobbish, arrogant and aloof (6%). Whilst the first drawback is widely expressed amongst the successor generation in the other countries surveyed, the second is less frequently offered.

The 'high and mighty' image of the United Kingdom was widely expressed in the Malaysian focus group discussions:

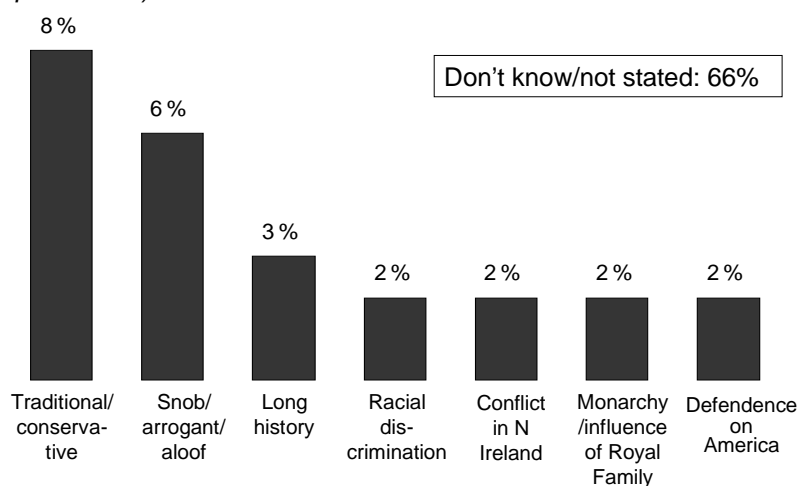
The British have this so-called 'proper way' of doing things. They are inflexible and conservative

[British people] keep to themselves most of the time, not like the Americans who are friendly to everyone

[The British] see you like a second class society. They like to judge people on what they have/wear ... They look down on you

The United Kingdom's Major Weaknesses (Spontaneous)

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

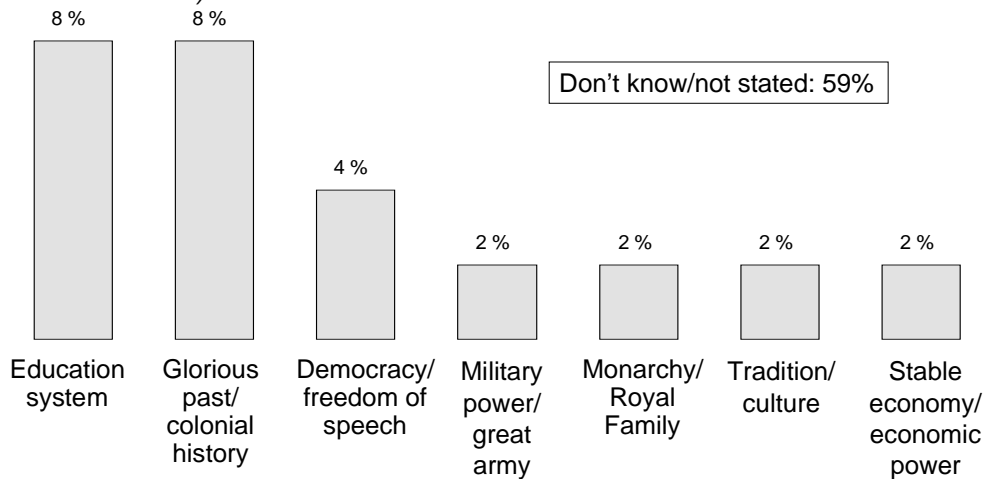


Base: All Malaysian successor generation (200)

With regard to the United Kingdom's strengths, the pattern is again rather different to the world-wide picture. Malaysian men believe that the strongest point is our education system (9%), whilst women consider our glorious past and colonial history as more significant (9%). Whilst education also figures high on the world-wide list, the most commonly cited strength - British tradition and cultural heritage - is mentioned by only a few Malaysians (2%, all men).

The United Kingdom's Major Strengths (Spontaneous)

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



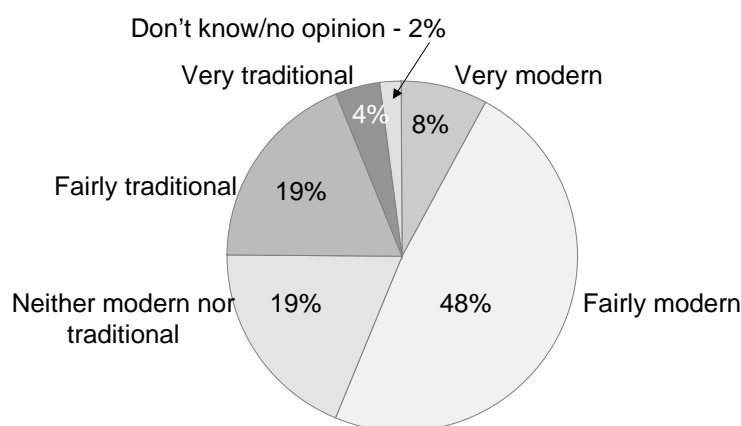
Base: All Malaysian successor generation (200)

British Society

Unexpectedly given the spontaneous strengths and weaknesses above, Britain is more likely to be regarded as a modern society rather than a traditional one. While half of the Malaysian successor generation believe that Britain is a 'fairly modern' society, only one in five believe that it is 'fairly traditional'. These views contrast sharply with those recorded across the globe where the 'traditionalists' considerably exceed the 'modernists'.

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 Malaysian successor generation (200)

There is a noticeable gender and age difference, however, with regard to this issue in Malaysia. For example, twice as many women as men deem Britain as 'traditional' (31% compared with 16%). Furthermore, the 29-35 age group are twice as likely to award British society a 'very modern' status than their younger counterparts (11% versus 5%).

The most positive aspects of British society, according to the Malaysian successor generation, are our national health service (69% agree it is 'good') and democratic government (66% agree we are a 'good example' of one). Women, however, are noticeably less convinced by our governmental regime.

Sadly, Malaysians are less likely than most to be of the opinion that we protect our environment. Whilst across the world 65% agree that we look after our environment, this figure drops to 48% in Malaysia.

Compared to the other countries included in the survey, Malaysians are also less likely to endorse Britain as a multicultural society and one that does not discriminate against women. 55% of respondents across the world disagree with the statement that 'Women are discriminated against in Britain', whilst the same can be said for less than a third of Malaysians. As might be expected, women and the younger respondents (22-28 years) are more likely to believe that women endure unfair behaviour in Britain. Similarly, 63% world-wide agree that we are a multicultural society compared to just 46% of Malaysians.

Aspects of British Society

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* Scores	Mean scores world- wide*
Britain has a good national health service	69	7	14	0.78	0.85
The British system is a good example of a democratic government	66	10	19	0.68	0.69
Britain is committed to protecting the environment	48	12	29	0.41	0.83
The British legal system ensures that everybody gets a fair trial	38	8	41	0.40	0.72
Britain no longer has a comprehensive system of social welfare	39	18	30	0.28	-0.04
British people are not racially tolerant	34	15	39	0.23	0.12
British society is truly 'multicultural'	46	23	26	0.22	0.64
British people are not very welcoming towards foreigners	30	23	40	0.08	0.17
Britain is now a 'classless' society	32	31	31	-0.02	-0.82
Women are discriminated against in Britain	24	30	32	-0.14	-0.65

Base: All successor generation in Malaysia (200)

*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.

British Business

The United States (72% of the Malaysian successor generation 'strongly agree') and Japan (65%) are more likely to be regarded as having many 'world-beating' companies than is the United Kingdom (18%). However, only 2% disagree that we have many 'world-beating' companies, a figure four times less than the one reported for the world. Germany records a similar rating to the UK, while France is least highly rated of the five (although marginally more 'strongly agree' that it has many world beating companies).

Overall, however, the responses are rather similar to the world-wide picture with the United States and Japan taking first and second place and the United Kingdom undesirably trailing behind.

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 %	Don't know %
USA	72	19	2	3	6
Japan	65	26	2	4	5
France	23	35	6	22	16
Germany	22	50	3	15	10
UK	18	58	2	14	10

Base: All successor generation in Malaysia (200)

These figures would appear to indicate that, as emerged in the qualitative work, British business people are regarded as being unwilling to take enough risks to be able to compete successfully in an ultra-competitive environment. For example, some felt that British business people are well-suited to trading in the British environment, which is regarded as bounded by rules of fair play, whereas they are unable to cope in conditions where 'rules' get stretched, or even broken on a regular basis. Americans, on the other hand, are considered as leaders in the business field, and utilise geographical variations to their advantage:

*British business people have a lot of innovative ideas but
their decision-making is very conservative*

Americans are more business-minded [than the] British. ... I do not think that [British people] know anything about how to run their business[es]. They don't know how to do business. For example, the shop opening and closing hours are limited. They close as early as 5 pm when ... they should be more flexible

Americans are great competitors ... [And, they] are smart. They assemble their products in Malaysia, for example, but their brand name is American ... They use local materials [e.g. from Malaysia], use local labour like Barbie Dolls, but the brand name is American. You can get their product all over the world but the product is not produced in America

Fortunately, Britain is better rated by the Malaysian successor generation in some areas. For example, paralleling the world-wide results, the United Kingdom is more likely to be regarded as a major financial trading centre. Although the United States (93% 'agree') and Japan (84%) stand out, seven in ten (71%) concur that the United Kingdom is also a major trading centre. Germany (44%) and France (39%), on the other hand, gather much less recognition.

British products and services are also favourably rated, with one in five Malaysian respondents rating them as 'very good', while a further 69% say they are 'fairly good'. Just 4% think that Britain's products and services are poor. Again, these figures are comparable to those recorded world-wide.

In contrast to the world-wide case, British workers are rated as highly as managers by the Malaysian successor generation. Indeed, the Malaysian respondents are less inclined than most countries to perceive British management as 'good' (65% compared to a world-wide average of 74%). On a more positive note, only 3% rate British managers as 'poor', whilst this figure falls to 2% when considering workers alone.

The qualitative work revealed some negative attitudes towards British managers in terms of their rigid management styles:

Their style is authoritarian and their management is from top to down below. [There is] no chance for their subordinate to say anything

The contrast between British and American managers was particularly pointed out:

[American managers] listen to their subordinates. Subordinates are more relaxed in doing their work. The relationships with their bosses are more open and the opinions of the subordinates are accepted. Sometimes [the workers] do not know who the boss is because they mix around freely

Perceptions of British Business

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

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

a) the British workforce ?

b) British management ?

	Products & services	Workforce	Management
	%	%	%
Very good	18	19	11
Fairly good	69	47	55
Neither good nor poor	10	22	20
Fairly poor	3	1	2
Very poor	1	1	1
Don't know	1	11	12
Net good	83	64	63

Base: All Malaysian successor generation in Malaysia (200)

British Science & Technology

Paralleling the world-wide findings, Malaysians regard the United Kingdom as fourth out of the five countries tested with regard to having a strong reputation for scientific and technological innovation. However, the actual proportion of respondents who consider the United Kingdom to have a robust standing in this field is 10 percentage points greater in Malaysia than the world-wide average. In addition, the successor generation here is less likely to disagree that Britain's name is strong.

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 %	Don't know %
USA	64	30	3	3	1
Japan	61	31	2	7	0
Germany	28	46	3	20	4
UK	14	57	7	21	2
France	17	44	8	27	5

Base: All successor generation in Malaysia (200)

In the focus groups, many participants expressed their disappointment with Britain's scientific and technological innovation and, in particular, their dissatisfaction with British scientists. While British scientists are considered very rigorous and extremely good at their jobs, they are believed less capable at capitalising on their research:

British [scientists] keep to their standard and are more structured. They are good in mathematics, but [at the same time they] are stagnant

British scientists are old, not prominent nor expanding their [body of] work. There is nothing new about them, especially in their work. They are not creative and [are always] working on the same thing

American scientists were considered in a very different light to the British. Their innovative and resourceful nature was well-recognised:

What I notice ... in terms of IT, the Americans are more advanced than the British. Much more, about ten years advanced. I think it goes back to Americans being more creative and independent. They just figure things out. They see things in different ways. British scientists tend to be more straightforward. Physics would be suitable for them

An American can make one small thing creative. That's why Americans are way ahead of everyone else. Research and development are better in the US. They have more experience ... The scientists in the US follow their instinct. They have no boundaries

British Media

Members of the successor generation in Malaysia do not hold the British media in high esteem. While opinion around the world comes down marginally in support of the notion that the British media tells the truth (36% agree, 28% disagree), in Malaysia only a quarter believe that this is the case, compared to exactly three in ten who do not think so.

Men (who are more likely than women to make use of print media as a main source of information about a country) are more likely than women to believe that the British media tells the truth and that it is of a higher quality.

Despite the scepticism towards the British media, six in ten of the successor generation believe that their own media is worse. In fact, only one in ten consider the media in Malaysia to be more honest.

A similar proportion - 63% - believe that the British media is of a higher quality than that in Malaysia. Indeed over half of these say that the quality is 'much better', while just 3% describe it as 'much worse'. Unsurprisingly, those who work in the government sector are twice as likely to consider British media as worse:

The government owns most [of the Malaysian newspapers and they] mostly cover government news [and so] there is a bias

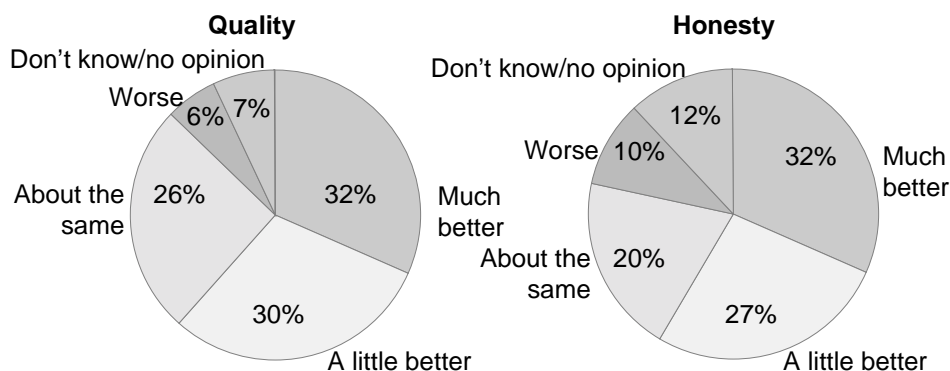
Despite the relatively good opinion regarding British media, the tabloids were unsurprisingly singled out during the focus group discussions as second-rate:

British tabloids like The Sun are trash. They merely cover sensational news, especially about The Royal Family

The tabloids ... keep on covering the same stories. They are trash

British Media

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



Base: All Malaysian successor generation (200)

British Art

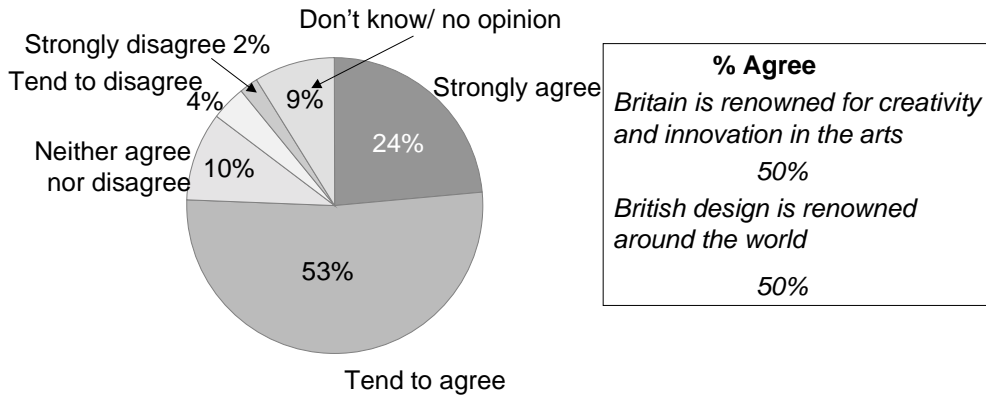
Those who agree that Britain is renowned for creativity and innovation in the arts outnumber those who disagree by a factor of four to one (compared to a world-wide proportion of less than three to one). Overall, 50% agree in Malaysia, with 12% agreeing strongly. People who have visited the UK are more likely to recognise our resourcefulness in this field.

Malaysians also recognise that British design is renowned around the world. Exactly half agree that this is the case, compared to just 11% who disagree. Those members of the successor generation with Masters degree are especially praiseworthy of our design ability (in contrast to the world-wide picture).

There is a general consensus, however, in Malaysia and world-wide, that Britain's reputation in the arts is based more in the past than in the present. Nearly eight in ten (77%) of those in Malaysia agree that this is the case, with about a third of this group agreeing strongly (particularly women).

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 Malaysian successor generation (200)

The reasonable level of regard for British art, but perception of it being dated, is a feature which emerged in the qualitative research. British art was viewed as being of high quality:

I've always liked the British actors because they are good actors. The ways they act portray what acting is all about. They know what acting is all about. [The] British are taught in principles while Americans just jump to it and do their best

But, at the same time unexciting and old-fashioned:

British arts represents their culture – very reserved and grey

The colour to express British music is grey

In fact, when asked to name a British person who represents the Arts, one member of the group replied:

The best person I can think of is Shakespeare

This lack of awareness of our current artistic output is reinforced by the survey findings. Many respondents are unable to think of any contemporary British artists (82%), even if they have visited the UK (80%). The most spontaneously-recognised British artist in Malaysia is Rowan Atkinson (Mr. Bean) who is cited by one in ten respondents. However it emerged in the qualitative work that this artist does not present a positive image and therefore is not one of the better ambassadors for the country:

... Mr. Bean portrays a negative side of [the British]. He is a British personality, yet he sometimes has no character at all. What you portray on the media can indicate the culture of a country. It can represent a country

Around the world, Rowan Atkinson (Mr. Bean) is considerably less recognised (3%), with only Saudi Arabians naming him more frequently than the Malaysians (12%). Elton John is the artist who musters up the most world-wide support (5%), yet in Malaysia he is only acknowledged by 1% of the successor generation.

Leading British Artists (Spontaneous)

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

Top answers:	%
Rowan Atkinson	10
Hugh Grant	5
Spice Girls	3
Don't know/no answer	82

All other answers 1% or less

Base: All successor generation in Malaysia (200)

The British music scene does fare better than art generally, both in Malaysia and across the other countries surveyed. About half the Malaysian respondents are able to name at least one contemporary pop musician (rising to two-thirds of the 29-35 age group and those who have visited Britain).

The most widely mentioned pop stars in Malaysia and world-wide are the Spice Girls and Elton John, named by one in five in Malaysia and one in six world-wide. Although The Beatles are not a 'contemporary' band, this group is cited by 9% of the successor generation in Malaysia (mainly men and those aged 29-35), a similar figure to the one reported world-wide (10%).

Leading British Pop Musicians (Spontaneous)

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

Top answers:	%
Spice Girls	22
Elton John	21
The Beatles	9
Phil Collins	6
George Michael	6
Sting	5
Paul McCartney	3
Oasis/ Liam Gallagher/Noel Gallagher	2
Robbie Williams	2
Don't know	45

All other answers 1% or less

Base: All successor generation in Malaysia (200)

British Personalities

Tony Blair is the most recognised British 'celebrity' (from a list of twenty-two) among the successor generation in Malaysia (92%) and around the world (90%). The British Prime Minister is closely followed by Rowan Atkinson (91%) who achieves much less world-wide recognition (35%). The Malaysian number three, Spice Girls, enjoys second place across the world. Discouragingly, Robin Williams (the only American on the list) comes in as the seventh most recognised name (nominated by 67%). With Hugh Grant and Kate Winslet also fairly well-known, film stars evidently achieve high levels of recognition. On the other hand, designers, artists and business people are decidedly less renowned.

There is some difference in awareness levels between genders and age groups of those in the list. For example, men are more likely than women to recognise sports stars such as Linford Christie and Tim Henman. The younger age group (22-28) are more likely to recognise *avant-garde* personalities including Vivienne Westwood and Damien Hirst.

Tony Blair remains the personality who people are most likely to be aware is British (receiving 81% acknowledgement), with the top four positions held by the top four who achieve the highest recognition overall. Encouragingly, rather fewer believe that Robin Williams is British, although a quarter of the successor generation do believe this to be the case.

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. Again Tony Blair scores highly, but is out-performed by the Spice Girls and, at lower levels of familiarity, Richard Branson, Tim Henman and Anita Roddick; over 90% of those who have heard of them are aware they are British.

Well-known Britons

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

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

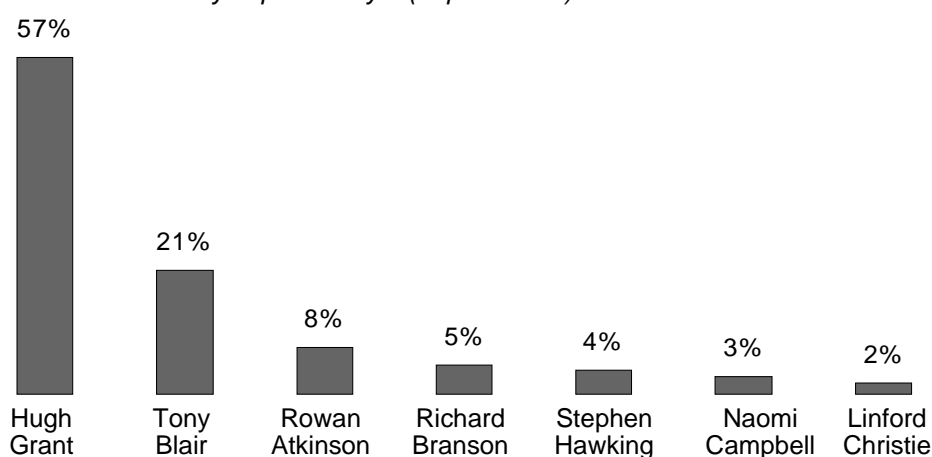
	Heard of	British	Proportion recognised as British
	%	%	%
Tony Blair	92	81	88
Rowan Atkinson	91	69	76
Spice Girls	78	77	99
Hugh Grant	73	54	74
Kate Winslet	69	34	49
Naomi Campbell	68	30	44
Robin Williams	67	24	36
Linford Christie	52	36	69
Stephen Hawking	42	26	62
Richard Branson	33	32	96
Tim Henman	28	27	96
Liam Gallagher	27	22	81
William Hague	23	12	52
Anita Roddick	21	20	95
Vivienne Westwood	21	12	57
Delia Smith	20	18	90
John Galiano	19	10	53
Stephen Shaw	18	8	44
Damien Hirst	17	9	53
PD James	15	11	73
James Dyson	12	2	17
David Hockney	11	6	55
None of these	1	6	
Don't know	3	9	

Base: All successor generation in Malaysia (200)

As a note of caution, it needs pointing out that a red herring was inserted into the list - Stephen Shaw from the British Council in the UK. Stephen achieved an 18% recognition factor in Malaysia, with nearly half of them claiming to know that he is British. There are two possible explanations for this. It may be that people were thinking of another British person with a similar name (perhaps George Bernard Shaw). Alternatively, it may simply be a case of over-claiming, in other words 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 David Hockney or James Dyson. There is no obvious reason why someone might make up knowledge of Stephen Shaw but admit that they have never heard of 'real' celebrities.

Role Models

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



Base: All Malaysian successor generation (200)

Hugh Grant stands out as the potential role model for the Malaysian successor generation. Nearly six out of ten (57%) say that he represents the most positive example for them. World-wide, Hugh Grant does not receive such admiration. For example, in Mexico he achieves the second highest score at 6%.

Tony Blair is also a popular choice in Malaysia and world-wide with 21% of the successor generation selecting him as a role model. In the qualitative work, the British Prime Minister received a fair amount of support, with one participant saying 'he's doing the best for the country'.

There are some differences between the groups with regard to role models. As found across the world, women are more likely to select Hugh Grant. Men and those who have visited the UK clearly prefer Tony Blair.

Britain's Relationships with other Countries

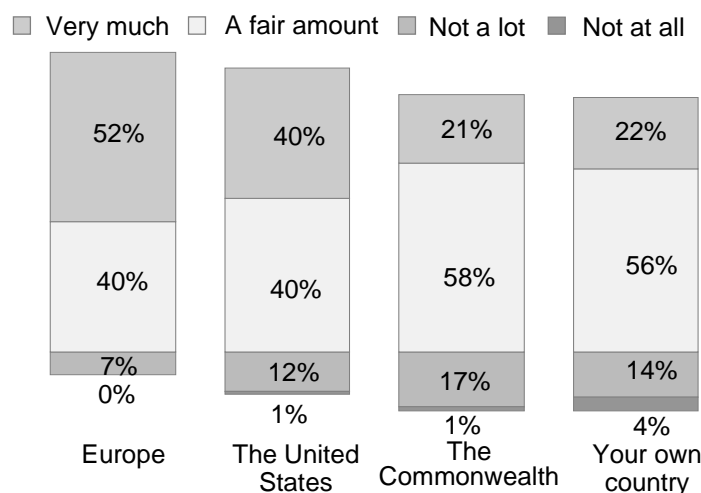
Britain is perceived by the Malaysian successor generation as valuing its relationship with Europe more than the USA. This finding differs from virtually every other country surveyed. Nine out of ten respondents believe the European connection is valued, with nearly 60% of these saying 'very much'. The USA and Commonwealth relationships are also highly valued, according to the Malaysian successor generation.

It is men and the 29-35 year olds who are particularly positive about Britain and its relationship with other countries.

There is a perception by Malaysians that Britain also values its relationships with their country a lot. Four in five respondents (78%) say that the relationship is important to Britain, with nearly a third of these believing it is valued 'very much'. In fact, Saudi Arabia is the only other country surveyed who thinks that its relationship is more highly valued.

Relationships Between Countries

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



Base: All Malaysian successor generation (200)

Although Malaysians are generally positive about Britain's relationships with their own country, the focus group discussions revealed that these ties are characterised by unequal power:

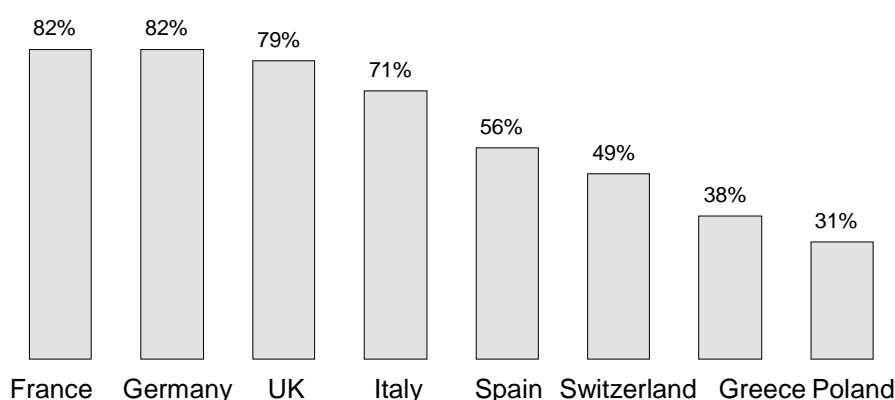
They know we exist, they know relations exist, but they tend to look down [on us]

The European Union

France and Germany are the two countries which Malaysians are most likely to regard as being part of the European Union. The UK is the third most recognised EU member, nominated by 79% of the successor generation. Unfortunately, this leaves one in five Malaysians who are not aware of UK membership. Half of the respondents wrongly believe that Switzerland is a member, whilst nearly a third say the same for Poland.

Membership of the European Union

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



Base: All successor generation in Malaysia (200)

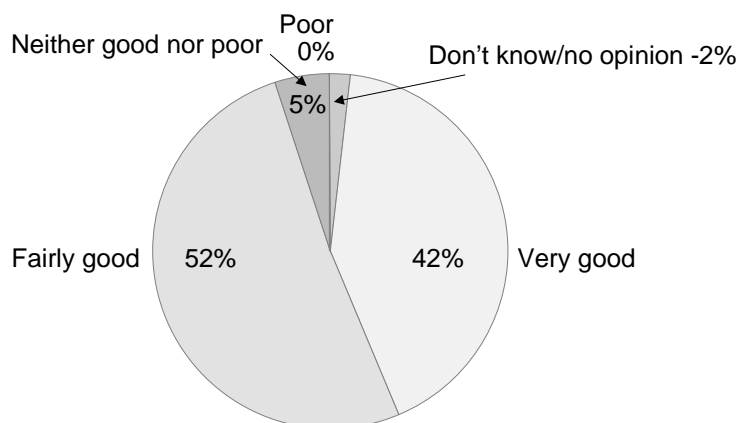
Overall, compared to the rest of the world, Malaysians are more likely to say that a country is an EU member when it is not, and less likely to claim a real member is actually part of the EU. Amongst the Malaysian successor generation, men, the 29-35 age group and those who have visited the UK are more aware of genuine members.

Education

More than nine in ten members of the successor generation in Malaysia rate the overall quality of British higher education as good, with nearly half of these saying it is 'very good'. By way of contrast, none of the respondents consider British education as either 'fairly' or 'very poor'. In fact, of the other countries surveyed, only Saudi Arabia and Mexico rate British education more highly and this only marginally so. Malaysian students particularly feel that our education is high-quality. However, those who already possess a Masters degree are more likely to rate it as 'fairly' rather than 'very' good.

Quality of British Education

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



Base: All Malaysian successor generation (200)

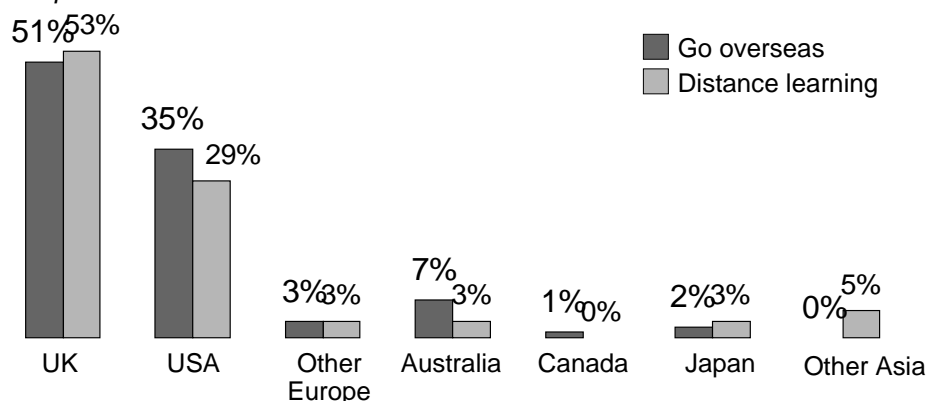
Reinforcing this very positive finding, the UK stands out as the country in which most members of the Malaysian successor generation would prefer to study. Half of the respondents would select the UK, compared to only a third for the USA (the most common choice world-wide). Indeed, the proportion of Malaysians who select the UK considerably exceeds every other country surveyed except Russia. Other countries in Europe, Australia, Canada and Japan are not particularly appealing.

There are some gender and age variations with regard to studying overseas. While men are less keen on the UK and the USA, women are more convinced by the British system. Meanwhile, the 22-28 age group clearly prefer the UK, whilst the 29-35 are more likely to opt for the USA.

For distance learning courses, again the UK stands out, with over half the respondents preferring a British programme of study. Furthermore, this time, both men and women, between 22 and 35, rate the UK as their number one choice. The USA remains in second place, although its favourability has decreased (from 35% to 29%), mirroring the world-wide picture.

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 Malaysian successor generation (200)

These findings would appear to back up the qualitative research which found that British teachers and professors are regarded as being extremely knowledgeable but not particularly communicative. Whereas it is felt that it is possible to interact with an American teacher, this is discouraged in British institutions. A distance learning course would therefore negate many of the advantages which an American institution is perceived to offer, making the British course more attractive in comparison:

[British teachers] are conservative. I think [they] follow the books and their answers are very structured unlike the Americans who just teach. ... The way they study and their method of teaching reminds me of high school – absorbed, absorbed, absorbed

There is always a one-way communication with the British, not much discussion because they are more theoretical. Their method of teaching is merely about students taking down notes and evaluation is basically on examination

The UK also stands out in terms of providing the educational qualifications which have the most credibility with potential employers (with six in ten Malaysians believing this). This considerably exceeds any of the other countries surveyed. Less than a third of the successor generation lend support to the USA, which takes first place world-wide.

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 ?

	%
UK	59
USA	29
Japan	5
Australia	2
Malaysia	1
Canada	0
Don't know	5

Base: All successor generation in Malaysia (200)

Overall, the survey findings show that Britain is a leader in education. It is the first choice in terms of overseas study and distance learning courses, and its educational qualifications are thought to have the most clout with potential employers. Unfortunately, those who took part in the qualitative work did not share these opinions. They clearly preferred the American system emphasising its flexible, communicative and open nature:

The best teaching method would be the American system

The American education systems are very open in a sense where an engineer is not only an engineer, but also versatile and an all-rounded engineer

Their communication is two-ways and they treat students like adults, allowing them to participate in classes. They appreciate their students' ideas and respect students like adults, but not the British, they treat students like students

Despite the qualitative results showing that the British system is rigid and one-way, there is a general feeling that the British are themselves well-educated both in Malaysia and world-wide. Eight in ten Malaysians feel this way, with one in seven going so far as to believe that we are 'very well educated'. Just three per cent, on the other hand, feel that 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	14
Fairly well educated	64
Neither well nor poorly	19
Fairly poorly educated	2
Very poorly educated	1
Don't know	1

Base: All successor generation in Malaysia (200)

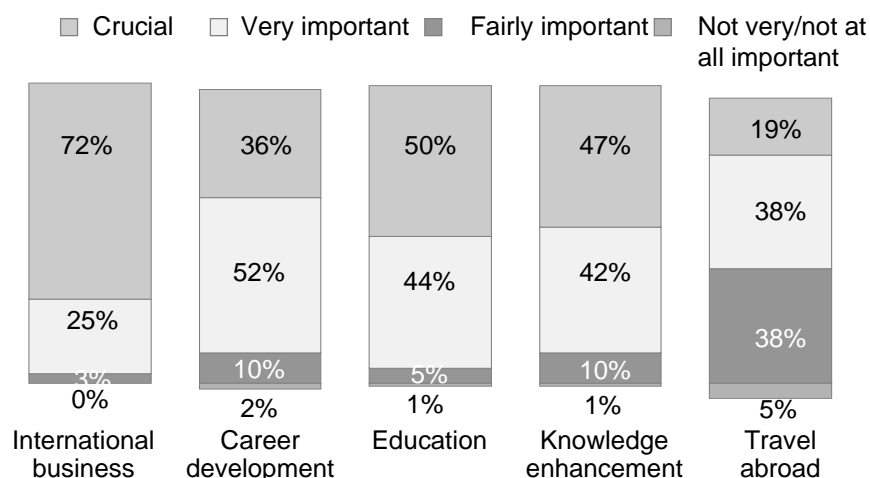
Languages & the English Language

Virtually all the successor generation in Malaysia speak English (98%). The second most widely-spoken language is Chinese, with one in five speaking it (slightly more men, those in the 22-28 age group, and those who live in Kuala Lumpur). Few speak any of the other languages listed.

French is the language which most Malaysians say they would like to be able to speak – six out of ten (59%) nominate it as their preferred language, followed by Japanese (39%), Chinese (32%), German (25%) and Spanish (13%). The picture is rather different to the one presented world-wide where Chinese and Japanese are unpopular choices.

Importance of English Language

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



Base: All Malaysian successor generation (200)

The importance of English as the language of international business is demonstrated by the fact that 97% of Malaysians rate it as at least 'very important'. The figure of 72% who say it is 'crucial' in this regard is in line with the average around the world (70%). Domestic and overseas education is regarded as the next most important use of English (74% say it is at least 'very important'), with exactly half rating it as 'crucial'. Travel abroad appears to be the least important area for speaking English, but even here, six in ten (57%) rate it as at least 'very important'.

Those in the government sector (59%) are less likely than private sector employees (78%) to rate English as 'crucial' for international business. Unsurprisingly, students believe that the ability to speak English for educational purposes is a lot more 'crucial' than the other groups surveyed.

Sources of Information about Countries

The Malaysian successor generation use a wide variety of information sources when finding out about other countries. Around a third use international and local press or local TV news. A similar proportion regard visiting the country as important and/or talking to people who have visited the country.

Sources of Information

- Q1a What sources of information are most important to you when you form an opinion about a country ?
- Q1b And which is the one most influential source ?
- Q32 Please tell me which two or three sources of information are most important when forming an opinion specifically about the United Kingdom.

	Q1a Important %	Q1b Single most important %	Q32 Important for the UK %
Local press	40	7	0
International press	38	6	0
Visiting the country/UK personally	37	24	41
People who have visited the country/UK	34	11	33
Local TV news	34	8	0
Word of mouth – friends and family	29	6	28
International TV	27	7	13
Films	20	3	18
Books	19	9	23
Word of mouth – work colleagues	18	2	18
Media (press, TV, radio from that country)	18	4	n/a
Know people from the country/UK	17	3	22
Other local TV	6	1	0
Tourist authorities in the county/UK	5	2	5
Local radio	4	0	3
International radio	1	0	3
National TV news	N/a	N/a	17
BBC World TV	N/a	N/a	16
British press	N/a	N/a	15
BBC World Service	N/a	N/a	8
Other official sources from that country	0	1	2
Other international press	N/a	N/a	30
Other	0	0	1
Don't know	4	0	8

Base: All successor generation in Malaysia (200)

Different population cohorts seek information from different sources. Whilst men and government sector employees typically use some form of media, women prefer to rely on first-hand experience, such as visiting the country personally. Where an individual lives also influences the source of information. Those from Petaling Jaya are most likely to select local press, whilst the successor generation in Kuala Lumpur would mainly choose international press.

Regarding the UK only, visiting the country is the most important source of information when forming an opinion about it (nominated by two in five respondents). In second place is finding out information from people who have visited the UK. In contrast to the world-wide findings, the BBC World Service is not an important information source for the Malaysian successor generation, though one in six mentions BBC World TV.

Visiting the United Kingdom

A little under half the Malaysian successor generation have visited the United Kingdom at least once, with 12% having visited on three or more occasions. Those in the 29-35 age group, students and those with a Masters degree are most likely to have visited the United Kingdom.

Implications

British society

Given that our main weakness is felt to be our tradition and conservatism, and one of our main strengths our glorious past and colonial history, it is surprising that more Malaysians regard Britain as 'modern' than 'traditional'.

Our education and government systems and our national health service are particularly well-regarded in Malaysia. Many areas, however, could be improved. For example, Malaysians are less likely to believe that we protect our environment, or that we are a multicultural society which does not discriminate against women, than is true world-wide.

British business

British business has a positive image in Malaysia. However, there is a feeling that particular aspects of it are limiting our potential to grow and develop in this area. The conservatism of business people is a major hindrance. To improve our reputation, businessmen and women will need to be perceived as more creative in their thoughts and actions.

British Art

Opinion is mixed in Malaysia with regard to British Art. Whilst many consider it innovative and creative, more think our reputation is based more in the past than the present. Hence, many of the 'contemporary' pop musicians associated with Britain are less 'contemporary' than hoped (for example, The Beatles, Elton John, Phil Collins and Sting).

British education

British education is highly regarded in Malaysia, and the British themselves are considered well-educated. Britain stands out as the country in which most people would prefer to study or take a distance learning course. On the downside, British educationalists are not regarded as particularly communicative, providing formal, dreary lessons.

The ability to speak English is thought to be a definite strength in many areas of life. Virtually all of the Malaysians speak English, saying that it is a particularly important skill for international business, furthering education, career development and even travel abroad.

How to communicate with the Malaysian successor generation

A wide variety of information sources are used when forming an opinion about a country. First-hand experience or asking people's opinion who have visited the country are especially important to the Malaysian successor generation. Consulting particular forms of media, such as the press or TV, are also popular, and therefore might be exploited to provide a current, more consistent image of Britain. It is necessary, however, to be careful in this area, because although our media is a valuable information source, it is not particularly well-regarded, with only a quarter believing that it tells the truth.

In terms of potential role models to communicate a more up-to-date image of Britain in Malaysia, Hugh Grant stands out. Tony Blair is also a popular personality, both in Malaysia and around the world.

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 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%
	±	±	±
3,000	1.1	1.6	1.8
1,000	1.9	2.8	3.1
200	4.2	6.4	6.9

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

Differences required for significance at or near these percentage levels*

Size of the samples compared	10% or 90%	30% or 70%	50%
	±	±	±
100 vs 100	8.3	12.7	13.9
150 vs 50	9.6	14.7	16.0

Interviewing Locations and Quotas

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

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

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