

Attitudes Towards Britain and the British – Nigeria

**Research Study Conducted for
the British Council**



April - June 2000

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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 Nigeria. 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 in 13 different countries between May and August 1999.

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.

In Nigeria, the definition used was:

- aged 22-35
- professionals with a least a first degree from a university
- earning high salaries by Nigerian standards
- middle/senior managers in private, public, NGO and quasi-government sectors, bankers, consultants, academicians, entrepreneurs, people working in the media, medical personnel, lawyers, bankers, politicians
- active in social, cultural, business and political spheres or NGO related civil society

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 Lagos and Abuja in Nigeria. Fieldwork took place in Lagos and Abuja between 4 – 8 May 2000. The groups were moderated by an experienced researcher with MORI's research partner in Nigeria.

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 discussions (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 in Lagos, Abuja and Port Harcourt. Interviews were conducted face-to-face. Fieldwork took place between 24 April and 15 May 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 Nigerian 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

In Nigeria, as elsewhere, the United States is the best known of the five key countries measured. Three-quarters feel that they know at least a fair amount about the United States, while two in five (43%) go so far as to say they know it 'very well'. Indeed, Nigerians feel significantly more familiar with the US than is true across the 17 countries surveyed this year, where on average 23% feel they know it 'very well'.

The United Kingdom is next in line to the US - 63% of Nigerians know at least a fair amount about it, close to the average of 58% for the 17 countries taken as a whole; a quarter (23%) know it very well. Japan (41% know it very or fairly well), Germany (34%) and France (29%, below the 17 country average of 39%) follow behind.

As well as being the best known of the five countries in Nigeria, the US is also the best regarded. Almost all (94%) have a favourable opinion of the country, with two-thirds 'very favourable'. The UK is almost as well regarded – with 87% favourable and 43% very favourable. Japan, Germany and France all record a favourability score of 79%, but Japan is best regarded of the three on balance, due the fact that few (just 4%) have an unfavourable view of the country.

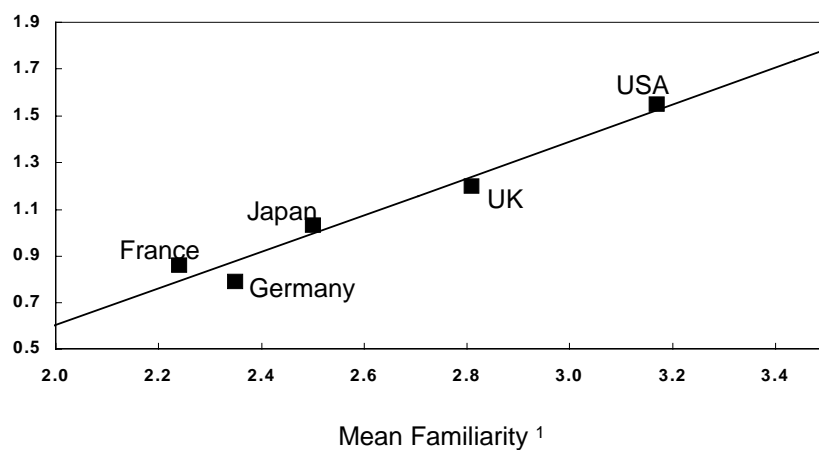
All five countries are rather better regarded in Nigeria than on average across the 17 countries. This is particularly true of the US and the UK, making them better rated than Japan in Nigeria, while across the 17 countries taken as a whole, Japan is marginally ahead. Indeed, in none of the other 17 countries does the UK receive a more positive rating than it does in Nigeria, despite the fact that some countries, namely Bangladesh, Pakistan and UAE, feel more familiar with the country.

As might be expected, those Nigerians who have visited the UK are more likely than average to feel that they know this country 'very well' (45% vs 23% on average). They do not, however, have a significantly more favourable view of the country. Interestingly, those who work in the public sector (government) are more positive towards the UK (97% favourable) than those who work in the private sector (83% positive).

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. The diagonal line is known as the 'line of best fit'. If there were an exact linear relationship between these two variables, all the plotted points would lie on a straight line. This almost never happens with real data, but a line can be calculated which comes closer to the plotted points than any other. As one can see, the relationship between familiarity with the five countries and favourability towards them is very clear in Nigeria, with all five close to the line of best fit. It clearly shows the strong position held by the US, the more middling position of the UK and relatively lower levels of the other three.

Familiarity & Favourability Towards Countries

Mean Favourability ¹



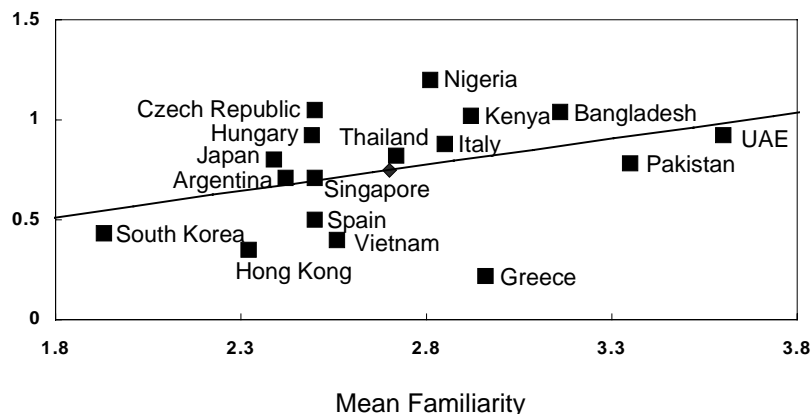
Base: All successor generation in Nigeria (200), April-May 2000

The chart overleaf compares the UK findings in Nigeria with the results from the other 16 countries (the diamond in the chart represents the mean score¹). It clearly demonstrates the relatively high regard in which the Nigerians view the UK – no other country has a better overall opinion. This is similar to views in Bangladesh and Kenya; like Nigeria, former colonies, which evidently retain a degree of affection for the UK.

¹ 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'

Familiarity & Favourability Towards the United Kingdom

Mean Favourability



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

Images of the United Kingdom

As might perhaps be expected, in Nigeria as in most other countries where the research took place this year, England is the most recognised nation within the UK. However, awareness is generally lower in Nigeria than on average across the 17 countries. When asked which countries make up the UK, England is cited by 72%, followed by Scotland (59%), Wales (51%) and Northern Ireland (41%). The average scores across the 17 countries are all over two-thirds for the four constituent parts of the UK. One in ten Nigerians (compared to an all country average of 5%) say, without prompting, that the United Kingdom is the same thing as Great Britain.

This lower level of awareness may be at least partly related to the fact that Nigeria is one of the countries with the lowest mean number of visits to the UK. Certainly, those Nigerians who have visited the UK are significantly more likely to name each of the four countries which make up the UK.

Images of UK Countries *(unprompted)*

Q16-19	What one image best sums up to you ?			
	Scotland	%	Northern Ireland	%
	Cold/wet weather	15	Greenery/green fields	11
	People/Scottish	11	IRA/Sinn Fein	9
	Edinburgh Festival/Tattoo	10	Cold/rainy weather	9
	Kilts	9	Violence/religious wars	8
	Whisky	7	Belfast	7
	Castles	5	Religion	5
	Highlands/mountains	4	Guinness	3
	Bagpipes	4		
	Edinburgh	4		
	Islands	4		
	Nothing	23	Nothing	38
	England	%	Wales	%
	Royal Family	22	Princess Diana/Princess of Wales	26
	Colleges	13	Prince Charles/Prince of Wales	12
	Football	12	Castles	11
	The Queen	9	Rugby	4
	London	8	Royal Family	4
	Margaret Thatcher	7	Welsh/Celtic dialect	3
	Arrogant people	6	Mountains	3
	Buckingham Palace	6		
	Houses of Parliament	3		
	Powerful economy	3		
	Tradition/conservative	3		
	Nothing	3	Nothing	31

All other answers 2% or less

Base: All successor generation in Nigeria (200), April – May 2000

In addition, the Nigerian successor generation is less likely than average to have an image of Scotland, Wales and Northern Ireland. Over one in five have no image of these countries, one of the highest levels of ignorance of the 17 countries. As elsewhere, Nigerians' image of Wales is dominated by Princess Diana (26% spontaneously name her) and Prince Charles (12%), but also by castles (11%). Scotland conjures up images of cold/wet weather (15%), Scottish people (11%), the Edinburgh Festival (10%) and kilts (9%). Refreshingly, Nigerians are far less likely than any of the other 16 countries to spontaneously associate Northern Ireland with religious conflict, but then Nigerians have a weaker image of Northern Ireland than do any of the other nationalities. Religious conflict is a relatively important image even in Nigeria though; with

Sinn Fein, it shares a top four position alongside green fields and cold/rainy weather.

Clearly, the Nigerian successor generation feels better acquainted with England (just 3% have no image of the country, in line with the all-country average) than the other four countries which make up the UK. As elsewhere, the Royal Family stands out as the most popular image of England, mentioned spontaneously by 22% of respondents. Colleges, like Oxford and Cambridge (13%) and football (12%) are the next most popular images.

United Kingdom's Strengths & Weaknesses

In common with the successor generations in Kenya, Singapore and Vietnam, it is the UK's economy which is seen by Nigerians as our major strength. Over a quarter of Nigerians say, without prompting, that our strong and stable economy is the foremost strength of this country, while one-sixth think our key strength is a strong and stable currency (manufacturers in the UK would no doubt disagree with regarding this as a strength!).

The Pound Sterling is the most powerful currency in the world

Lagos

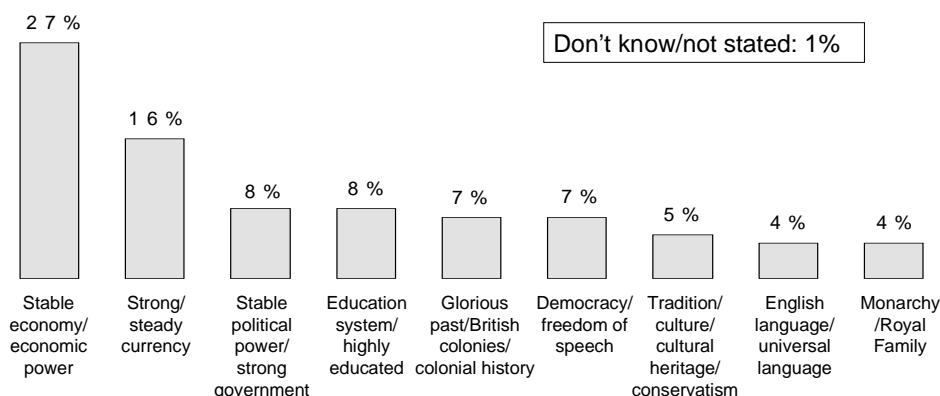
Related to this, a further 8% concentrate on our stable political system as our key strength. On prompting, 86% agree that 'The British system is a good example of democratic government', 57% strongly, the highest score of the 17 countries surveyed.

Our education system, too, is felt to be a strength - 8% cite it, unprompted, as our key strength, while when asked to rate the overall quality of our higher education, 87% say it is 'very good'.

Others look to our past achievements for our strengths – our colonial history (7%) and our tradition/heritage (5%). The latter is not nearly so strongly emphasised as it is in some countries, though, where it is seen as our major strength.

The United Kingdom's Major Strengths (Spontaneous)

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

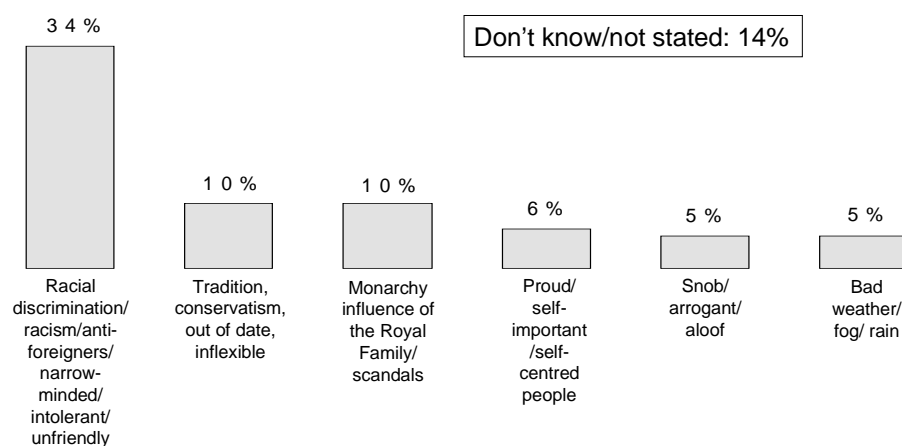


Base: All successor generation in Nigeria (200), April-May 2000

A reputation for racial discrimination is clearly perceived to be our main weakness in the eyes of the Nigerian successor generation. As many as one in three (34%) spontaneously cite this as our key weakness and it is as likely to be mentioned by those who have visited the country as those who have not. It is perhaps significant that the only other country to feel this as strongly is Kenya, the only other African country (and like Nigeria, an ex British colony) among the 17. Nonetheless, on prompting, the majority of Nigerians (75%) do agree that 'British society is truly multi-cultural', and half (49%) agree that 'British people are racially tolerant' (32% disagree), so it seems that not all view Britain as a racist society.

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 Nigeria (200), April-May 2000

Other perceived weaknesses relate to tradition, conservatism, inflexibility or being out of date (10%, while a further 3% feel we rest too much on our laurels) and the monarchy (10%). These are the two key weaknesses across the 17 countries taken as a whole.

The are conservative and proud of their past glory; they can do better. They should improve

Abuja

The British community is a typical conservative community that does not accept changes when it comes to culture and they're very rigid in that respect

Lagos

The people, too, are seen as a weakness by some Nigerians – proud and self-important (6%) and arrogant (5%). Again, though, on prompting more feel we are very welcoming to foreigners (54%) than do not (30%).

The British are arrogant. For instance, In Nigeria 1999, when their team was beaten by The Congo, the players refused to shake hands with their opponents

Abuja

The qualitative research also confirmed that the colonial history of Nigeria has an important impact on their views of Britain and the British, often negative, but not exclusively so:

I see Great Britain as a colonial master and a robber because they came to colonise Africans and rob us of everything that will be of benefit to us

Lagos

(Positive side of colonialism?) *We're able to read and write today. I believe something good came from colonialism – we're able to clothe ourselves and we have a lot of churches*

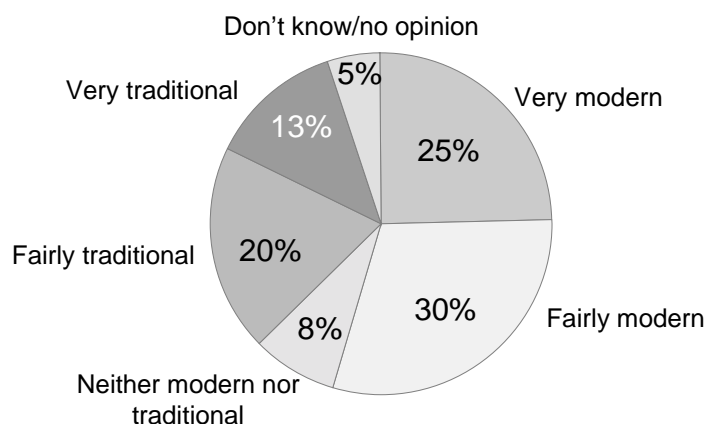
Lagos

British Society

On balance, the Nigerian successor generation believes British society is modern (55%) rather than traditional (33%), in contrast to many of the other 16 countries surveyed this year. Bangladesh, Kenya, Singapore, Thailand and Pakistan (just), though, share the Nigerians' view.

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 Nigeria (200), April-May 2000

The most positively rated aspects of British society in Nigeria are:

- Our perceived commitment to protecting the environment – 91% think we are, 66% strongly
- Our legal system – 93% think our legal system ensures everyone gets a fair trial, 63% strongly
- Our national health service – 93% think it is good, 59% strongly

Similarly, our system of government is highly rated in Nigeria (86% think we have a good example of democratic government, 57% strongly) and, as we saw earlier, it is seen as one of our key strengths. The focus groups threw further light on this – the British government was seen as very organised and ordered, with its leaders achieving their positions on merit:

The British Government is organised. If they are running a democracy for the past 50 years, it means they are organised

Abuja

(As a leader in Britain) you must have a track record and you must have the confidence of the people

Lagos

The majority also view British society as truly multicultural (75%) and without sex discrimination (66%). Views are less clear cut on our level of racial tolerance, 'classlessness' or the welcome we give to foreigners, but the balance of opinion is positive. However, a significant proportion (around 30%) does not think we are racially tolerant, very welcoming to foreigners or classless. In the focus groups, too, it was clear that Britain was not seen as a society which discriminates along the lines of sex; quite the opposite. However, it was seen as a society which discriminates by race. We were also seen as a society run very much along class lines:

They give women rights to lead. You can see Margaret Thatcher

Abuja

Professionally, there is no discrimination between men and women. The discrimination I know is racial discrimination. The black man will find it hard to go professionally over there but in America your skills determine how far you can go

Lagos

The structure of British society is such that they have the monarch, then those who have some money. Even where you live in Great Britain, in London, is determined by your class

Abuja

Great Britain does not welcome Nigerians. I think the reason is the way we present ourselves. We present ourselves badly

Abuja

The focus groups revealed perceptions of British people as conservative and reserved, but also making up a very honest society:

The British are reserved people. They are hard-liners and they are very difficult people to deal with

Abuja

People in Great Britain may not be too friendly, but they also have their good points. If you're lost or something they can guide you even if they don't know you, or if you ask a question and they don't know, they will tell you they don't know. They are sincere

Lagos

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*
Britain is committed to protecting the environment	66	26	5	2	%	+1.58
The British legal system ensures that everybody gets a fair trial	63	30	3	2	%	+1.56
Britain has a good national health service	59	34	1	3	%	+1.55
The British system is a good example of democratic government	57	30	4	11	%	+1.30
British society is truly 'multicultural'	32	44	10	10	%	+0.96
Women are discriminated against in Britain	11	8	7	66	%	-0.96
Britain is now a 'classless' society	21	31	10	32	%	+0.24
British people are very welcoming towards foreigners	11	43	12	30	%	+0.25
British people are racially tolerant	16	33	11	32	%	+0.20

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

Base: All successor generation in Nigeria (200), April – May 2000

The Nigerian successor generation is significantly more positive about all of these aspects of our society than the average across the 17 countries. This perhaps reflects their generally high opinion of the country, which is more positive than any of the other 16 countries.

On all of these aspects there is no significant difference between those who have visited the UK and those who have not, suggesting that personal experience does not change, or confirms, the impressions of British society gained from other information sources.

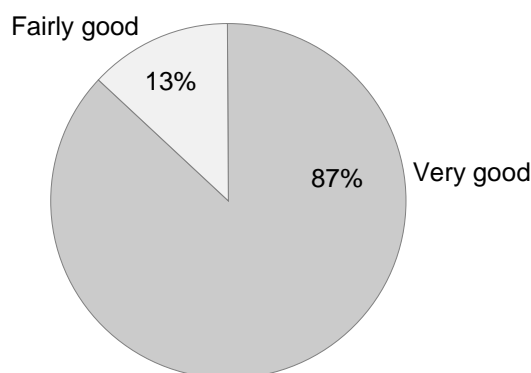
Education

As with their opinion of British society generally, the Nigerian successor generation has a very high opinion of British education. The vast majority (87%) of Nigerians believe that the overall quality of British higher education is ‘very good’, while the remainder describe it as ‘fairly good’. As we saw earlier, education is also seen as one of the key strengths of the UK.

In the qualitative research, the image of British education was that it was solid and organised, reflecting society in general, with excellent facilities (especially compared to Nigeria):

Quality of British Education

Q24 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 Nigeria (200), April-May 2000

Their schools are more organised and they have good facilities

Abuja

Teachers are respected, highly motivated and civilised

Lagos

The teachers have facilities – computers, games and everything to work with

Abuja

Similarly, Nigerians think the British themselves are well educated (55% very and 44% fairly).

This high opinion of our education system is shared by the other 16 countries surveyed; in none is our higher education believed to be poor by more than four per cent. However, Nigerians, in common once again with Kenyans, are particularly positive.

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	55
Fairly well educated	44
Neither well nor poorly	1
Fairly poorly educated	1
Very poorly educated	0
Don't know	0

Base: All successor generation in Nigeria (200), April – May 2000

In addition, from a choice of six countries – US, UK, Nigeria, Japan, Canada and Australia – educational qualifications from the UK are thought to offer the most credibility with potential employers. Three in five are of this opinion (rising to 77% in Abuja), compared to 35% who opt for the US.

*People have reverence for somebody with a British certificate
because some of these universities are very old*

Lagos

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	61
USA	35
Canada	3
Nigeria	2

Base: All successor generation in Nigeria (200), April – May 2000

Despite this, and the generally high regard for British education in Nigeria, the UK is only the second most popular choice for overseas study or for distance learning courses, behind the United States. In each case, around half say their first choice would be the US, compared to just short of two in five who say the same about the UK (although three in five say a UK qualification offers most credibility). There are clearly other factors at work here, and the qualitative research sheds some light on this. Though we are seen as offering a very high standard of solid, respectable education, we lose out to the Americans on the practical side – which is seen to offer courses with a practical element as an integral part. (In addition, the perceived racism of the British people may well play a part.)

The United States has the edge over Great Britain, because if you are doing something they always link you up with a particular company that has a bearing on what you are doing

Lagos

There should be a bridge between what is practical and what is theoretical

Lagos

American education seems to be winning these days with practically-orientated results

Lagos

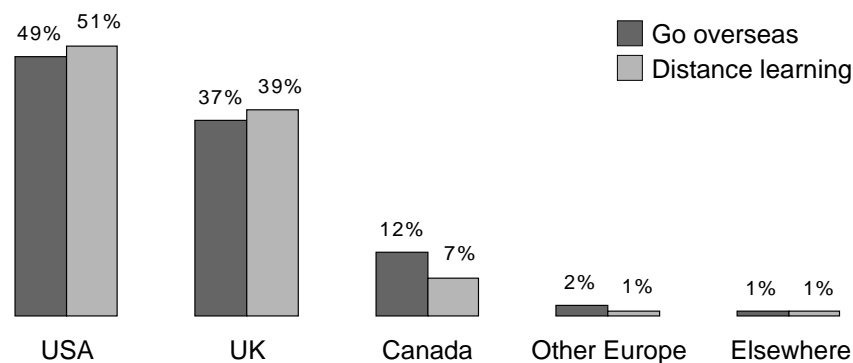
The American education gives you a wider scope. It makes you open and versatile, whereas the British education is solid in that it is specialist-orientated

Lagos

‘Older’ members of the successor generation in Nigeria (30-35 year olds) and those who live in Port Harcourt are most likely to say they would choose the UK for overseas or distance learning.

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 Nigeria (200), April-May 2000

British Business

Out of five countries measured, the UK is ranked third behind the US and Japan in terms of having many world-beating companies. Half strongly agree that the UK has many world-beating companies and a further 36% tend to agree, making 86% in total. In contrast, 96% believe that the USA has many world-beating companies, 92% think the same of Japan, 86% of Germany (though fewer strongly agree than in the case of the UK) and 74% of France.

Once again, the Nigerians demonstrate a particularly positive attitude towards the UK compared to the other 16 countries surveyed. Only in Bangladesh are opinions as positive, though Kenya (46% strongly agree), the UAE (43%), Argentina (42%), Pakistan and Hungary (41% each) are not far behind.

Women have a more positive opinion than men on this issue (net agree: 86% vs. 70% of men), while those in Abuja (net agree: 93%) are more positive than those in Lagos (68% net agree).

Britain's colonial heritage would seem to be important in the relative strength of British business according to the focus groups, though there was also a belief that British business had declined. It was also not thought to have the extra drive exhibited by US business.

We're looking at Britain as the country that ruled us during the colonial period, while we're looking at America as a vibrant economy. Due to their (the British) conservative nature, they don't take risks as Americans do and that's why America is really ahead. It's not that they don't have the technical know-how

Abuja

Americans are into everything; they want to go to the moon; they want to be best

Abuja

Their (British) business is large scale. They have the advantage of well established linkages over the years

Lagos

I think they are shrinking globally, but internally they are still strong

Lagos

It's like British business is dying in Nigeria

Lagos

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	69	27	2	%	+1.63
Japan	67	25	4	%	+1.56
UK	50	36	8	%	+1.27
Germany	38	48	11	%	+1.11
France	23	51	18	%	+0.76

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

Base: All successor generation in Nigeria (200), April – May 2000

As well as having a strong reputation for possessing world-beating companies (albeit less strong than the past) it is clear that, in Nigeria, the UK also has a very strong reputation for producing quality goods and services and for offering value for money. Over four in five think our goods and services are better than others in terms of their quality (81%, 39% 'much better') and value for money (91%, 54% 'much better'). None thinks they are actually worse value for money and just one per cent thinks they are worse quality than those of other countries.

Once again, this is a more positive picture than average across the 15 countries in which this question was asked, particularly on the issue of value for money, where opinions are generally more divided, if on balance positive.

Perceptions of British Products and Services

Q28 **How do you view British products and services compared with those of other countries in terms of...?**

	Much better	A little better	The same	Worse	
their quality	39	43	17	1	%
their value for money	54	37	9	0	%

Base: All successor generation in Nigeria (200), April – May 2000

Again, this was echoed in the focus groups where British goods were described as high quality and durable, if expensive:

British products are better. If we have a product from the USA or Britain, I'll prefer the product from Britain because it lasts longer

Abuja

British products are very 'qualitative' that you'll use it and use it until you are tired

Lagos

Their products are highly valued and are very expensive

Lagos

British products last because they have better quality (than American products)

Lagos

This positive regard for the quality and value for money of British products and services appears to be translated into action by many people. Three-quarters of the successor generation in Nigeria say that they are more likely to buy a product or service if they know it is British, and a quarter say they are much more likely to do so. Only two respondents (one per cent) say they would be (a little) less likely to buy a product or service if they knew it was British. Again, this is more positive than the picture across the 15 countries where this question was asked, where 39% would be more likely to buy a product or service if they knew it was British.

Nigerians also have a very high opinion (and higher than average) of the British workforce and management (indeed 3% spontaneously cite our management as the key strength of the country). Almost all rate them highly (98%), and around two-thirds very highly (73% in the case of management). The average figures across the 17 countries are 59% good for the workforce and 69% good for the management. Both achieve their highest scores in Nigeria.

For some reason, respondents in Abuja have a particularly high opinion of both managers and workforce.

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	66	73
Fairly good	32	25
Neither good nor poor	1	1
Fairly poor	0	1
Very poor	0	0
Don't know	2	1
Mean score*	+1.66	+1.71

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

Base: All successor generation in Nigeria (200), April – May 2000

In the focus groups, descriptions of British businessmen reflected those of society in general – organised, conservative, well respected and cautious, if lacking that extra sparkle or drive:

The British businessmen are hard. They don't trust people and are suspicious

Abuja

The American businessman is open-minded while the British businessman is conservative

Lagos

The Americans are good managers, but not like the British...the extravagant nature of the Americans makes them carefree.. they won't bother when things get damaged

Abuja

Positive views of the UK are again in evidence when it comes to its reputation as a major financial trading centre. Nearly all (89%) agree that it has such a reputation (56% strongly agree), once more higher than the average of 76% agreement for the 17 countries taken as a whole. In addition, this is one area where experience of visiting the UK seems to enhance its reputation, as 71% of those who have visited the country strongly agree that it is a major financial trading centre.

Despite this, however, the USA (70% 'strongly agree') and Japan (64%) are more likely to be perceived as major financial trading centres.

British Science & Technology

The UK is ranked fourth out of the five countries tested in terms of its reputation for scientific and technological innovation. Though its ranking in Nigeria is the same as its average ranking across the 17 countries, the gap is less in Nigeria; indeed, Germany is only marginally ahead of the UK and the UK is a little ahead of Germany if one looks just at those who 'strongly agree'. Japan and the US retain their significant leads, however.

Thus, close to half strongly agree that the UK has a strong reputation for scientific and technological innovation (compared to 21% on average across the 17 countries) and a further 38% tend to agree. Just 8% disagree.

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	78	18	3	%	+1.70
Japan	82	14	3	%	+1.74
Germany	43	49	6	%	+1.26
UK	48	38	8	%	+1.23
France	30	48	12	%	+0.93

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

Base: All successor generation in Nigeria (200), April – May 2000

Again, solid, but somewhat conservative seems to sum up descriptions of British science in the focus groups:

I think the British scientist is very knowledgeable and quite practical, while the American counterpart is also knowledgeable and works in a better enabling environment

Lagos

The Americans are more innovative than the British because the British are very conservative

Lagos

Information about advanced technology comes from America

Lagos

The US embraces so many great things of the world because they have a lot of new ideas

Abuja

There is also a low level of knowledge of British inventions:

We don't hear much about them, no invention of any kind, except the plane they have made in conjunction with France. So we really don't know what those guys are doing

Abuja

When asked from which countries they think that certain twentieth century inventions emanated, fewer than three in ten are aware that any are British:

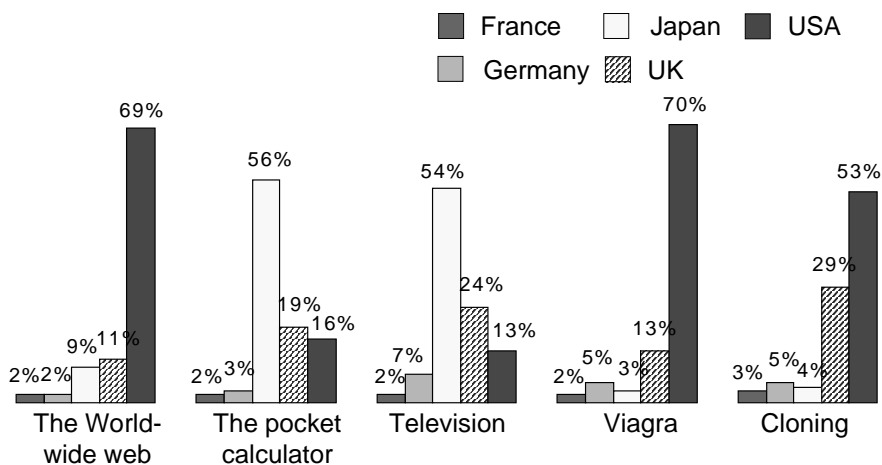
- Cloning – 29%
- Television – 24%
- The pocket calculator – 19% (actually an American invention)
- Viagra – 13%
- The world-wide web – 11%

Respondents are more likely to assume that the world-wide web, Viagra and cloning were invented in the US, and that the pocket calculator and television were invented in Japan.

Nonetheless, Nigerian respondents are more likely than average across the 17 countries to assume the UK was involved in all bar one of these inventions. The exception is cloning, which on average world wide is thought to have been invented in either the UK (47%) or the US (34%).

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 Nigeria (200), April-May 2000

British Personalities

In Nigeria, as elsewhere around the world, Tony Blair is the most well-known British personality (90% have heard of him), and the most likely to be known as British (96% of those who have heard of him know he is British).

He has a significantly higher profile than the next best known personalities: the Spice Girls (62% have heard of them but only 44% of those who have heard of them know they are British), Linford Christie (53%, but among those who have heard of him, he is second only to Tony Blair in being recognised as British – 76%) and Naomi Campbell (40% have heard of her, but only a quarter of these people know she is British).

Linford Christie achieves a particularly high recognition level in Nigeria compared to the other countries, while the Spice Girls and Naomi Campbell are rather less well known. Indeed, generally speaking, awareness levels in Nigeria are lower than average across the 17 countries.

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	90	86	96
Spice Girls	62	27	44
Linford Christie	53	40	76
Naomi Campbell	40	10	24
John Galliano	24	12	51
Hugh Grant	21	5	21
Steve Martin	21	7	33
Stephen Hawking	20	10	49
Richard Branson	17	7	39
Kate Winslet	15	2	10
Vivienne Westwood	14	4	26
Liam Gallagher	12	5	39
William Hague	12	5	43
Anita Roddick	12	2	13
David Hockney	11	4	38
Damian Hirst	10	4	37
Tim Henman	9	5	53
Delia Smith	8	3	38
Rowan Atkinson	7	4	62
James Dyson	6	2	27
P D James	4	1	13
Firzana Perveen	0	0	0
Don't know	1	2	-

Base: All successor generation in Nigeria (200), April – May 2000

As might be expected, those who have visited Britain tend to be more aware of many of these personalities and their Britishness – for instance, John Galliano (48% of those who have visited Britain have heard of him and two-thirds of these are aware he is British).

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 21% of respondents, while a third of those who know of him think that he is British. No-one claimed to have heard of Firzana.

British Art

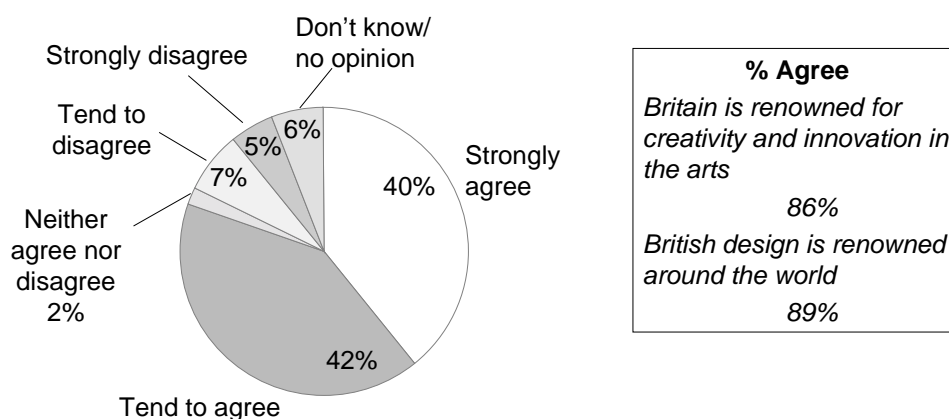
Four in five members of the successor generation in Nigeria (82%) believe that Britain's reputation in the arts is based more in the past than the present (a little higher the average for the 17 countries of 70%). In fact, two in five strongly agree, while just 12% disagree with this idea.

Despite this, Nigerian respondents believe that Britain is also renowned for creativity and innovation in the arts (86%, 50% strongly) and that British design is renowned around the world (89%, 46% strongly). This compares to averages of around 50% agreement for the two statements across the 17 countries.

In all three cases, it is the 'older' age group (30-35 year olds) which is more likely to agree strongly, along with those working for the government. First-hand experience of the UK appears to confirm the feeling that British arts are based more on the past than the present – 61% of those who have visited Britain strongly agree this is 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 Nigeria (200), April-May 2000

The focus groups also revealed somewhat conflicting views of British art – on the one hand traditional, but on the other dynamic and varied. Some impressions also clearly still hark back to colonial times.

The British are into arts. They have a lot dance. There are so many shows

Lagos

Great Britain gave us colonial music while the USA gave us pop music

Abuja

British art is very traditional. The museum is traditional in the sense that British art is usually based on paintings and portraits and these portraits are real life portraits of people

Lagos

British art is dynamic because the society is dynamic itself

Lagos

I admire British artists because they are a very academic and abstract set of people

Lagos

British Media

Four in five respondents in Nigeria (79%) believe that the British media can be relied upon to tell the truth; 48% strongly agree. Again, this is rather more positive than average across the 17 countries, where the average is two in five. Indeed, Bangladesh (85% agree), Nigeria (79%) and the UAE (71%) are the three countries where belief in the honesty of the British media is strongest.

Even more Nigerians (94%) believe that the British press is more honest than their own media (71% much better), and also that it is of better quality (94%, 85% much better). Again, these are much better scores than recorded on average across the 17 countries.

[British media] Because of their culture, they are dependable and very honest in reporting and they are very fast in gathering and transmitting information, in fact faster than America

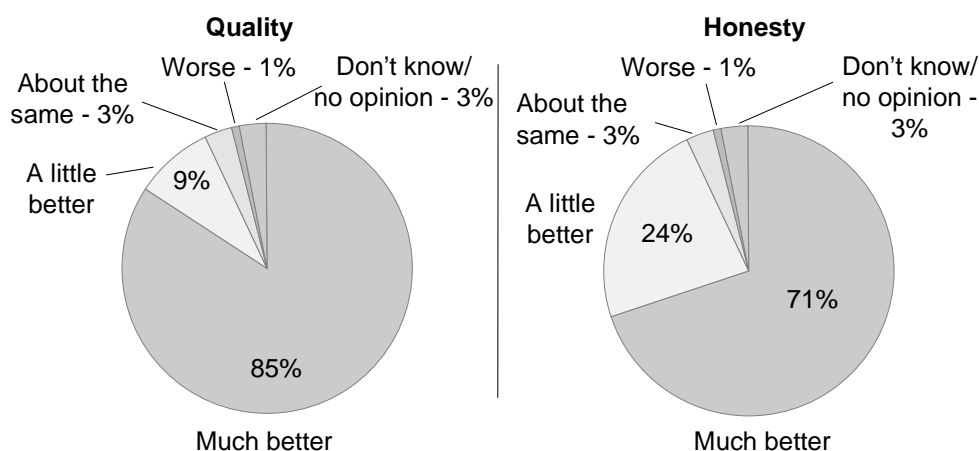
Abuja

British papers are up-to-date because they are brainy. Their method of gathering information is very reliable

Abuja

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 Nigeria (200), April-May 2000

Britain's Relationships with other Countries

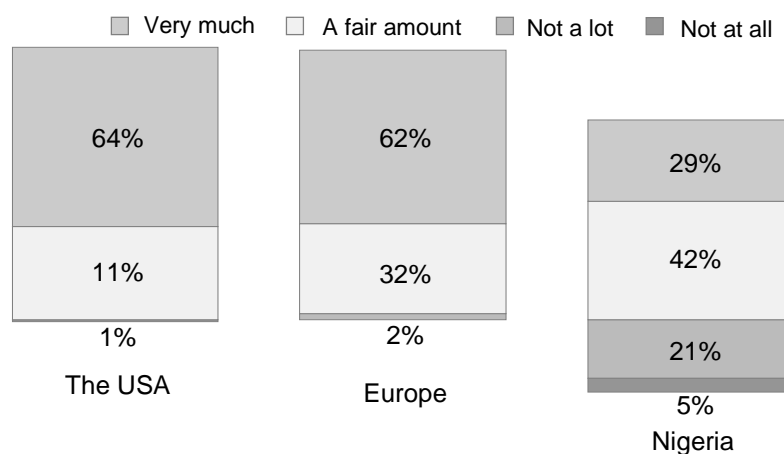
The Nigerian successor generation believes that Britain places equal value on its relationship with the United States and Europe, but that this is significantly greater than the value it places on its relationship with their own country. Thus over six in ten believe that Britain values its relationship with the USA and Europe 'very much', while just three in ten feel it places the same amount of emphasis on its relationship with Nigeria.

This is a common picture across the 17 countries generally. In fact, Nigerians are more likely to feel that Britain values its relationship with their own country than is general in other countries.

Respondents in Lagos are most likely to think Britain places a lot of value on its relationship with both Europe and the USA. Those in Abuja are most likely to think it places a lot of emphasis on its relationship with Nigeria (though they still think there is more emphasis on the US and Europe).

Relationships Between Countries

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



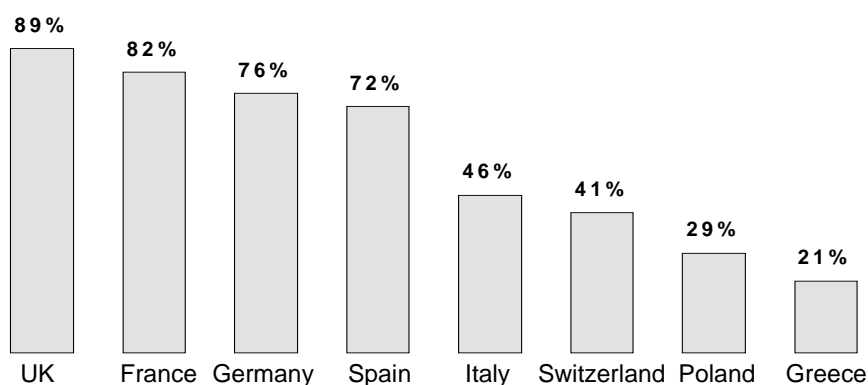
Base: All successor generation in Nigeria (200), April-May 2000

The European Union

The vast majority (89%) of the successor generation in Nigeria is aware of Britain's membership of the European Union. Almost as many are aware of France's membership (82%), while a majority are also aware that Germany (76%) and Spain (72%) are members. Fewer (46%) are aware of Italy's membership.

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 Nigeria (200), April-May 2000

Similarly, uncertainty exists over Greece's membership (just 21% think it is) and 41% wrongly think that Switzerland is (a common mistake to make across all countries).

In addition, 91% feel that Britain plays a leading role in the European Union, with 59% agreeing strongly (rather higher than the average across the 17 countries of 61% agreement, 22% strongly).

Languages & the English Language

Almost all (98%) of the Nigerian successor generation speaks English, while fewer than 10% speak any other foreign language. They would most like to learn to speak French (85%), German (39%) and Spanish (30%).

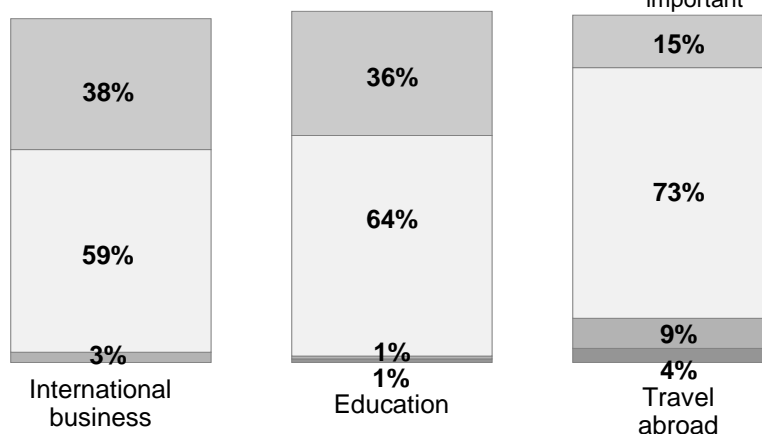
All think that the use of English 'crucial' or 'very important' for both international business and education, though fewer think it crucial for these things than the average across the 17 countries.

A high proportion of Nigerians also think it important for overseas travel (88% crucial/very important, higher than the average world-wide, though fewer Nigerians think it crucial).

Importance of English Language

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

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



Base: All successor generation in Nigeria (200), April-May 2000

Sources of Information about the UK

The BBC World Service and World TV are both much more important sources of information about the UK in Nigeria than they are generally world-wide. These two are by far and a way the main sources of information, cited by 49% and 39% of the successor generation respectively. Next most frequently mentioned is the British press (22%), again emphasising the importance of the British media in communicating with Nigerians about Britain.

As elsewhere, the Internet is an important source of information (18%) and likely to grow. Curiously, though 15% have visited the UK, only 7% mention this as one of their top 2-3 sources of information. More important it seems is talking to other people who have visited (18%).

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.

	%
BBC World Service	49
BBC World TV	39
British press	22
Internet	18
People who have visited the UK	18
Embassies/consulates	16
Other international TV	11
Other international radio	11
Local press	9
Books	8
Word of mouth - friends & family	8
Visiting the UK personally	7
Word of mouth - work colleagues	6
National TV news	5
Academic sources	5
Films	4
Other international press	4
Know people from the UK	4
Local radio	3
Other official UK sources	1
Other	2

Base: All successor generation in Nigeria (201), April – May 2000

One in seven (15%) members of the successor generation have visited the UK, mainly just once (4%) or twice (7%). Those in Lagos are most likely to have been (23%) as are those who have taken a post graduate degree (MA, PhD, MBA – 39%).

Among the 16% who have done so, two in five most recently visited Britain in the last two years. For one in three the visit was five or more years ago (and for one-sixth, over 10 years ago, which would mean their views based on this visit would be rather out of date).

Nearly all previous visitors have stayed in Britain for two weeks or more (in 95% of cases) and mainly for a holiday (55%) rather than work (26%) or study (23%).

Implications

The successor generation in Nigeria has a high opinion of the UK - higher than any of the other 16 countries in which the survey took place this year. They have a particularly high opinion of our economy, our system of government (and freedom of speech) and of our education system, all spontaneously mentioned as key strengths of the UK (and all thrown into sharper relief by the situation in Nigeria itself). Indeed, unlike most of the other countries surveyed, Nigerians actually rate us more highly than the US on the credibility of our educational qualifications. Almost without exception, the Nigerian successor generation also positively rates our commitment to protecting the environment, our legal system and our health service.

This positive opinion is not based on a high level of knowledge of the country, however, though given the historical links between Britain and Nigeria, Nigerians *feel* more familiar with the UK than do many of the other nationalities. As elsewhere in the world, though, views of the UK are fairly out-of-date in Nigeria. In addition, the degree to which Nigerian's feel they know the UK is not the same as how well they actually know it. Indeed, they are less likely to have an image of Scotland, Wales and Northern Ireland than many of the other nationalities. Only in the case of England do they have little problem in associating an image with the country, albeit mainly related to the Royal Family (or colleges like Oxford and Cambridge, or football). Nigerians are also less likely than elsewhere to be aware of Britain's role in the invention of cloning, but then they are more aware than many other countries of our invention of other things like the TV and Viagra. Like other countries, though, the assumption in Nigeria is that all these things were invented elsewhere (and usually either in the US or Japan).

Nor are opinions exclusively positive in Nigeria. This particularly relates to opinions about British people. Significant minorities think we are not racially tolerant, that we are not very welcoming to foreigners, and that we are not classless. Indeed, racial discrimination is the main weakness spontaneously associated with the country. In the focus groups we were described as arrogant, conservative, reserved and very rigid in our ways. At the same time, though, we were perceived to be a very honest society. In addition, experience of visiting Britain would only seem to confirm these feelings, as those who have visited Britain are no different in their views than those who have not.

This general view of British society as formal, rigid and conservative also affects views of specific aspects of our society. For instance, though very highly rated on our educational system, we lose out to the US as a place to go for overseas study because the US is seen to offer courses that are more flexible and practically orientated. Similarly, views of Britain in terms of business, science and technology are most positive but also characterised by a perceived lack of 'sparkle' or 'drive' compared to those of US – summed up by the words 'solid but conservative'.

Nigeria's status as an ex-colony clearly has an influence on people's views of Britain. A lot of what they think and feel about the country is coloured by the fact that Britain was once a great world power, which has now declined somewhat (but still relatively important). Opinions of the welcome we give to foreigners, and to Nigerians in particular, are also influenced by this. So too, though, are the positive opinions of our economy, business and political system. In addition, the historical and continuing links between the two countries do appear to make the Nigerian successor generation feel somewhat closer to us than those in some countries. For example, they are more likely than most to feel that Britain values its relationship with their country (though in common with elsewhere, we are felt to value our relationship with the US and Europe more highly).

In addition, the British media are very well viewed in Nigeria and are the key source of information about Britain. Top-rated in terms of importance are the BBC World Service and World TV (both much more important in Nigeria than in most other countries) and the British press.

The implications of all this for the British Council are that Nigerians, being generally positive, will be open to receiving positive messages about Britain, particularly those that relate to our business, economy, education and political system. We may have more problems convincing them that, for instance, we are welcoming to foreigners, especially when this view is backed up by people who have visited the country. The fact that the British media are highly rated on their credibility, and are Nigerians' key source of information about Britain (most notably the BBC), also potentially makes this task easier.

MORI/ 12648

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Appendices

Statistical Reliability	A1
Topic Guide	A2
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	8.3	12.7	13.9

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% ±
200 vs 200	5.9	9.0	9.8
100 vs 100	8.3	12.7	13.9
150 vs 50	9.6	14.7	16.0

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 Nigeria. 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 Nigerian 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 Nigerian 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 Nigerian 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 Nigerian 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 Nigerian business?

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

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

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