

# **Attitudes Towards Britain and the British**

## **South Africa**

**Research Study Conducted for  
The British Council**

**May - July 1999**



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# Preface

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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 South Africa. 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 South Africa, the definition used was:

- Aged 20-35
- Passed school matriculation and one stage of post secondary education

- Attending university or who have completed a university degree
- Employed or in full time education
- 50% of the sample from higher income groups
- Sample to reflect the demographics of South Africa

## Methodology

The survey was conducted in two distinct phases, beginning with two **qualitative focus group discussions** in South Africa. The groups were held in Johannesburg on 11 and 12 May 1999. Again, the decision as to which city to use was taken in consultation with MORI's local partner and the British Council office in the country. They were moderated by an experienced researcher with Markinor in South Africa.

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 South Africa, this was undertaken among 200 members of the same target audience. Interviewing was conducted face-to-face between 30 June and 14 July 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 results for South Africa, 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

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## Familiarity and Favourability with Key Countries

The United States and the United Kingdom are equally well known amongst members of the successor generation in South Africa in contrast to the world-wide figures where the United States is the best known. Around three-quarters say they know each country 'very well/fair amount'. Similar proportions say the same about Germany and France (36% and 33% respectively), although Germany is known 'very well' by a marginally higher proportion. Japan is the least well known of the five countries measured; two in five say they know 'almost nothing' (39%), and a further 42% feel that they know 'just a little'.

Female members of the successor generation in South Africa are less likely to be familiar with the United Kingdom – 30% say they know just a little compared to 16% of men.

Among those who know something about them, the United States and the United Kingdom are ranked highest in terms of overall favourability. The United States achieves a marginally higher 'very favourable' score - 28% versus 22% for the UK. France is viewed slightly more favourably than Germany - 65% versus 57%.

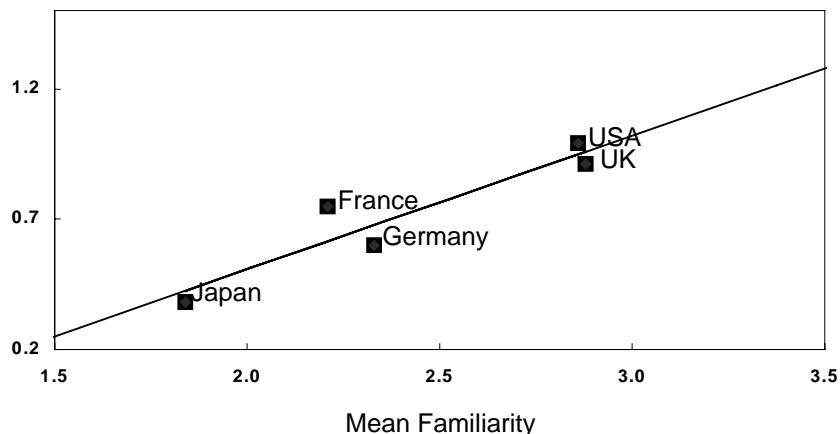
Of those who know at least a little about Japan 46% are favourable, however, two in five (38%) say they are neither favourable nor unfavourable. Looking at unfavourability ratings Japan receives the highest score overall - 15%, followed by Germany on 10%.

The chart overleaf shows, along the bottom axis, how well people feel they know each of the five countries – the further to a 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. It clearly demonstrates the equally strong position of the US and UK in South Africa as well as the weak position, based mainly on low levels of knowledge, of Japan.



## Familiarity & Favourability Towards Countries

Mean Favourability

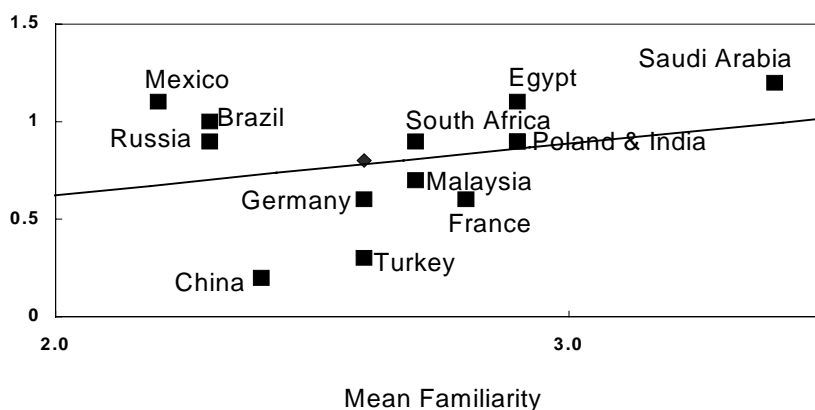


Base: All South African successor generation (200)

The chart below compares the UK findings in South Africa with the findings in the other 12 countries. It shows that South Africa's findings are close to, and a little ahead of, the average score for the 13 countries as a whole (shown by the star).

## Familiarity & Favourability Towards the United Kingdom

Mean Favourability



Base: All successor generation (2,952)

## Images of the United Kingdom

When asked what countries make up the United Kingdom, England achieves the most mentions (89%), followed by Scotland (83%), Wales (72%) and Northern Ireland (67%). Around one in seven respondents spontaneously say that the United Kingdom is the same thing as Great Britain. Other countries mentioned are Ireland (7%) and France (2%).

Highlands and mountains are the most recognised symbol of **Scotland**, mentioned by 27% of the successor generation in South Africa. Kilts are also widely recognised (21%) and to a lesser extent bagpipes, whisky (both nominated by 7%) and cold and wet weather (6%). The image of kilts is more prevalent amongst female members of the successor generation – 28% mention them versus 14% of their male counterparts. Across all the countries in the study, kilts achieve the most nominations followed by the highlands and then whisky.

Images of **Northern Ireland** are dominated by violence and religious conflict, mentioned by 42%. Scenery is the only other image nominated by a significant number of people (12%). A similar proportion do not have any image of Northern Ireland at all (13%), particularly women – 18% compared to 8% of men. This is in line with the world-wide figures although each image receives slightly fewer nominations bar one – violence, which in South Africa is nominated by slightly more than the all country average (42% vs. 37% overall).

The predominant image of **Wales** is rugby, fuelled no doubt by the popularity of the game in South Africa itself. It is nominated by 28% (34% of men), which is three times as many as the next most popular image Princess Diana (9%). Indeed South Africa and France are the only two countries in this study where rugby receives more than around a seventh of the nominations. Castles are nominated by 7% in South Africa, and mountains and ‘The Valleys’ by 6% each. As with Northern Ireland one in seven are able to think of an image associated with Wales (14%).

The Royal Family is the dominant image of **England** (26% - 32% of women) in South Africa, behind only Brazil and Turkey (nominated by 29% in each country). Other images are nominated by a small proportion of respondents, for example, bad/grey weather (9%) and football (8%). Tourist attractions also feature amongst the list of images; London and the House of Parliament and Big Ben are both recognised by 7% and the Tower of London and Beefeaters by 6%.

## Images of UK Countries (Spontaneous)

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

<b>Scotland</b>	%	<b>Northern Ireland</b>	%
Highlands Mountains	27	Violence	42
Kilts	21	Scenery	12
Whisky	7	Religion	5
Bagpipes	7	Peace Process	3
Cold/wet weather	6	IRA/Sinn Fein	3
Braveheart	4	Cold & rainy weather	2
Edinburgh Festival/Tattoo	3	Clover	3
Castles	2	Cold/rainy weather	3
Islands	2	Guinness	2
Haggis	2	Leprechauns	2
Nothing/don't know	6	Green Fields	2
		Nothing/don't know	13
<b>England</b>	%	<b>Wales</b>	%
The Royal Family	26	Rugby	28
Bad weather/Rain	9	Princess Diana	9
Football	8	Castles	7
London	7	Mountains	6
Houses of Parliament/Big Ben	7	The Valleys	6
Tower of London/Beefeaters	6	Male voice choirs	5
Red Buses	3	Royal family	5
Margaret Thatcher	3	Beautiful landscapes	5
Powerful economy	2	Prince of Wales	4
The Pound	2	Coal mining	2
Old buildings/History	2	Cardiff	2
Shopping	2	Nothing/don't know	14
Industry/Industrial areas	2		
Red phone boxes	2		
Nothing/don't know	2		

All other answers 1% or less

Base: All South African successor generation (200)

## Britain's Strengths and Weaknesses

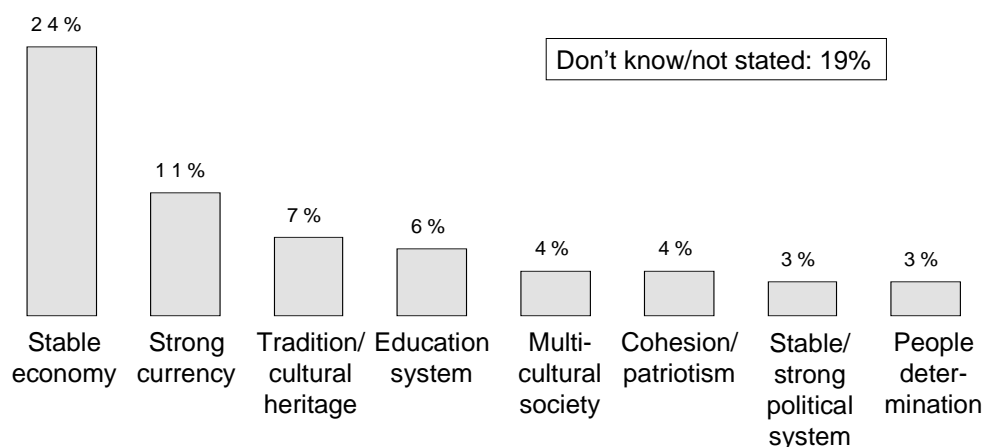
World-wide, the United Kingdom's tradition and conservatism are very much a double-edged sword. On the one hand, tradition and culture are the aspects most likely to be mentioned spontaneously as our major strength (13%), while phrases such as traditional and out-of-date for the modern world also attract most mentions as our major weaknesses (11%).

The pattern is little different in South Africa, although these aspects are mentioned to a lesser extent - 7% mention tradition, culture and heritage as a strength, compared to 8% who say that tradition and conservatism are a weakness.

Overall, the United Kingdom's economy and related aspects of it are mentioned most often as a major strength in South Africa. The United Kingdom's stable economy and economic power are cited by a quarter (24%), while one in ten mention the strong, steady currency (11%). The equivalent figures world-wide are 11% and 2% respectively. The British education system is nominated by 6%.

### The United Kingdom's Major Strengths (Spontaneous)

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



Base: All South African successor generation (200)

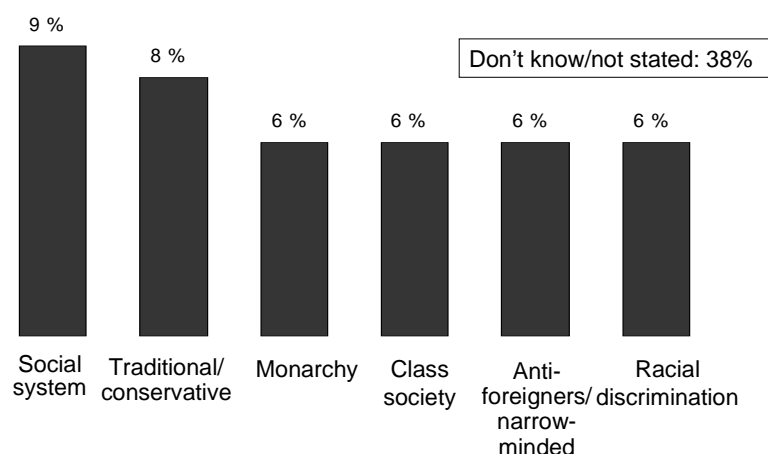
Looking at the United Kingdom's perceived weaknesses, no particular aspect stands out as a major weaknesses and, in fact, over a third (38%) are unable to offer an answer or don't know.

The social and welfare system is cited by 9%, followed by tradition and conservatism, nominated by 8%. Other mentions include:

- the monarchy and influence of the Royal family (6%)
- a class society (6%)
- anti-foreigners and narrow-mindedness (6%)
- racial discrimination (6%)

### 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 South African successor generation (200)

## British Society

In line with the figures world-wide, members of the South African successor generation view British society as largely traditional (51% vs 34% who think us modern). One in five view us as 'very' traditional (20%) in contrast to 8% who say we are 'very' modern. The equivalent all country figure is 14% for 'very' traditional and the same proportion for 'very' modern.

Younger members of the successor generation (20-25 year olds) are relatively less likely to view British society as traditional; 44% view us in this way, compared to 51% overall.

In the qualitative research, British people were often seen as being conservative and reserved, with certain standards that must be upheld. They were also seen to be very rigid in their outlook and lacking in a global perspective.

One of the most positive aspects in South Africa is that we are regarded as having a good national health service. Over three-quarters agree that 'Britain has a good national health service' -76% - while just 5% disagree. This is significantly higher than the all country figures where two-thirds agree (65%).

Britain is also viewed as being a good example of a democratic government; over two-thirds in South Africa agree (68%), with one in five agreeing strongly that this is the case (22%). This is in line with the all country figures (65%).

Other positive aspects of British society in South Africa and world-wide are the legal system and being seen as multi-cultural society. Around three in five agree that the 'legal system ensures that everyone gets a fair trial' and that 'British society is truly multi-cultural'. Older members of the successor generation (30-35 year) are more likely to say that our legal system is fair.

However, South African views are not quite as positive on the issues of Britain's commitment to the environment, its welfare system and that it is a classless society. World-wide figures indicate that Britain's commitment to protecting the environment is one of the most positive aspects of our society (65% agree that this is the case). In South Africa less than half agree - 47%. It is not the case that South African members of the successor generation disagree that Britain is committed to protecting the environment, only 10% disagree, the same proportion as the all country average, it is that they are undecided. The figures show that relatively more respondents are likely to say that they neither agree nor disagree (26% compared to 16% world-wide). Members of the successor generation in South Africa who are aged 30-35 years are more likely to agree that Britain demonstrates a commitment to the environment.

The view that Britain is not a classless society reinforces the impressions which came out of the discussion groups that Britain is viewed as having a very distinct class structure, which the British people believe is the right and proper way of doing things.

South African members of the successor generation are relatively more likely to believe that Britain has a comprehensive system of welfare compared to the all country results (40% versus 32%).

Members of the South African successor generation think, on balance, that the British are racially tolerant, as is true world-wide. Perhaps this is not unsurprising considering the history of racial tension in their own country. The view that British people are racially tolerant is particularly prevalent among those aged 20-25 years.

In addition, British society is seen as without discrimination to women, again in line with the all country figures. However, we are not seen as particularly welcoming towards foreigners. This is in line with the all country figures and is backed up by the qualitative work. This work revealed that we are perceived to be very reserved with visitors, adopting the typical British 'stiff upper lip', although we would go as far as to offer visitors "a cup of tea".

## 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.**

	<b>Agree</b>	<b>Disagree</b>	<b>Neither</b>	<b>Mean</b>	<b>Mean</b>
	<b>%</b>	<b>%</b>	<b>/nor</b>	<b>score*</b>	<b>score</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>World-</b>
					<b>wide*</b>
Britain has a good national health service	76	5	9	1.08	0.85
The British system is a good example of democratic government	68	14	15	0.77	0.69
The British legal system ensures that everybody gets a fair trial	61	10	20	0.66	0.72
British society is truly 'multicultural'	59	18	20	0.57	0.64
Britain is committed to protecting the environment	47	10	26	0.51	0.83
British people are not very welcoming towards foreigners	45	26	20	0.29	0.17
British people are not racially tolerant	37	26	29	0.14	0.12
Britain no longer has a comprehensive system of social welfare	16	40	21	-0.44	-0.04
Women are discriminated against in Britain	16	50	21	-0.60	-0.65
Britain is now a 'classless' society	9	71	14	-1.03	-0.82

Base: All South African successor generation (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 Kingdom is viewed by more than four in five members of the South African successor generation as being a major financial trading centre (86%), on a par with Japan (85%), and beaten only by the United States (97% agree, of which 68% strongly agree).

Germany and France take fourth and fifth positions respectively. France, however, lags quite considerably behind all the other countries measured with just under half agreeing (46%). World-wide the United States is, perhaps unsurprisingly, the leader in this area and the United Kingdom is relegated to third place by Japan.

World-wide, the United States and Japan are the most likely to be regarded as having 'many world-beating companies' – 97% and 94% respectively - followed by Germany (85%), the United Kingdom (72%) and then France (66%). In South Africa a similar pattern emerges. The United States emerges as the leader (94%), with Japan closely following behind (92%). Respondents are more likely to 'strongly' agree that the United States leads in this field (66% 'strongly' agree versus 54% for Japan).

The United Kingdom achieves fourth place out of the countries measured (76%), marginally behind Germany (80%), but clearly ahead of France (40%). It is not the case that the remaining proportions disagree, they are relatively more likely to be undecided (though as many as 18% disagree in the case of France). For both the United Kingdom and Germany around one in five neither agree nor disagree (18%); for France the proportion rises to over a third (37%).

Overall, female members of the successor generation in South Africa are less likely than their male counterparts to offer an opinion on both the above aspects in relation to Germany and Japan.



## World-beating Companies

Q6 Please tell me the extent to which you agree or disagree that ..... has many 'world-beating' companies

	Strongly agree	Tend to Agree	Neither/nor	Tend to disagree	Strongly disagree
	%	%	%	%	%
USA	66	28	6	0	1
Japan	54	38	7	2	0
Germany	42	38	18	2	0
UK	33	43	18	5	0
France	9	32	37	17	1

Base: All South African successor generation (200)

The qualitative work showed that while people's perceptions of British business people are generally positive - hard-working, successful and well educated - the management style is perceived to be hierarchical. A significant gap is seen to exist between managers and workers in terms of income, education and class. Little or no socialising is believed to occur between management and employees. There was also evidence of a perception that Britain lacks innovation in the business environment and as a result produces relatively few entrepreneurs.

*He is a serious person, out there to do his job, if he has to be another person he will be doing that at home*

Looking at perceptions of British products and services, over a quarter in South Africa rate them as 'very' good (29%), and a further three in five rate them as fairly good (59%). Only 2% rate them as poor. This is marginally higher than the all country figure of 81% who rate them as good. South African views are in line with Brazil, Russia and Mexico, but behind Saudi Arabia and Egypt.

*They are more manufacturing-orientated, they are not the people servicing type*

British management is rated relatively more highly than the British workforce (73% good versus 63%). This is in line with the all country results and is perhaps a hangover from our reputation in the 1970s for persistent strikes etc. One in seven say the workforce is poor (13%), compared to just 4% who say the same about the management. This score of 13% is the second highest score across all the countries measured, behind Egypt.

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### 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 ?**

	<b>Products &amp; services</b>	<b>Workforce</b>	<b>Management</b>
	<b>%</b>	<b>%</b>	<b>%</b>
Very good	29	20	19
Fairly good	59	43	54
Neither good nor poor	6	21	16
Fairly poor	2	11	4
Very poor	0	2	0
Don't know	5	5	8
Net good	+86	+50	+69

Base: All South African successor generation (200)

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*British employees go to work; they go to the pub afterwards or go and watch soccer or something whereas the manager gets up in the morning, dresses in his pinstriped suit; he travels on first class, reads the newspaper, gets in the office, works all day, goes straight home after work. There is no interaction between him and them*

## British Science & Technology

In line with the world-wide figures, the United Kingdom is not viewed as having the strongest reputation for science and technology out of the five countries measured. The United States leads the way on 95%, followed by Japan (94%), however more members of the successor generation are likely to agree 'strongly' that Japan in fact has a strong reputation (62% versus 52%). The United Kingdom takes fourth place overall (63% agree), behind Germany (84%), but some way ahead of France (38%).

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### 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.**

	<b>Strongly agree</b>	<b>Tend to agree</b>	<b>Neither/nor</b>	<b>Tend to disagree</b>	<b>Strongly disagree</b>
	%	%	%	%	%
Japan	62	32	3	2	1
USA	52	43	3	1	1
Germany	37	47	11	3	1
UK	20	43	28	7	0
France	7	31	36	15	5

Base: All South African successor generation (200)

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These overall findings are supported by the qualitative work, where British scientists are seen as very committed to their work and well disciplined, but their outlook is perceived to be quite narrow, rigid and lacking in innovation and vision.

*You do not see him much, he does not come out, he is white, pale, no tan. He smells like chemicals*

*I think they are very involved in what they do, very dedicated*

*I see the English scientist with test tubes and things bubbling the Dr Jekyll and Mr Hyde type*

*I think the British are exploring more, like you say -  
cloning sheep – genetics and scary stuff*

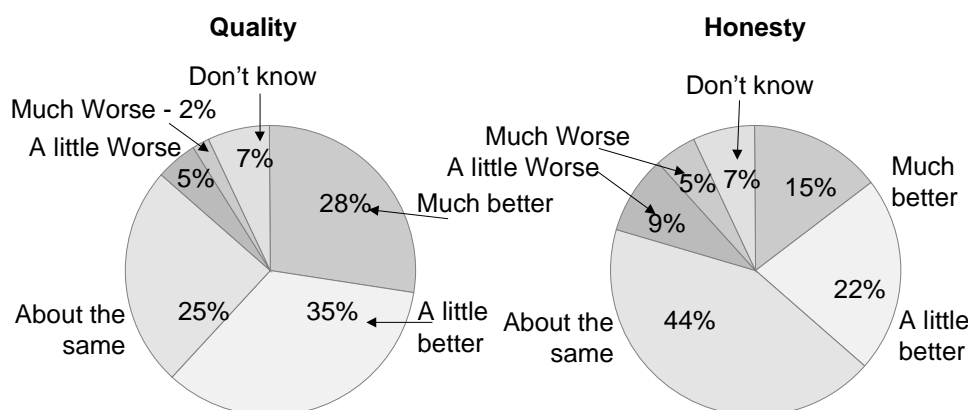
## British Media

Members of the successor generation in South Africa have more positive views of the media in Britain than in South Africa in terms of quality. Over a quarter say that it is much better than in their own country, and over a third say it is a little better; this is very much in line with the all country average. However, in terms of honesty, the South African and British media are most likely to be rated 'about the same' (44%). This is similar to the results for Germany, France and Poland. Over a third, however, do say that the British media is 'better' (37%).

Indeed, from the evidence in the qualitative research, reporting in the British media is seen to be responsible, factual and credible, covering both local and international events.

### British Media

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



Base: All South African successor generation (200)

Despite this, less than one in five actually believe that the British media tells the truth (17%). Indeed, out of the thirteen countries measured Germany and China are the only other countries that give the British media a worse score in this respect – only 5% in Germany believe that the media is truthful, 12% say the same in China, and the all country average is 36%.

*It's got a wide coverage, they are in touch with the whole world*

*They write a lot more intellectual type of things in them, like what happens in the parliament and all that*

*You get newspapers that are very informative right through to absolute rubbish*

## British Art

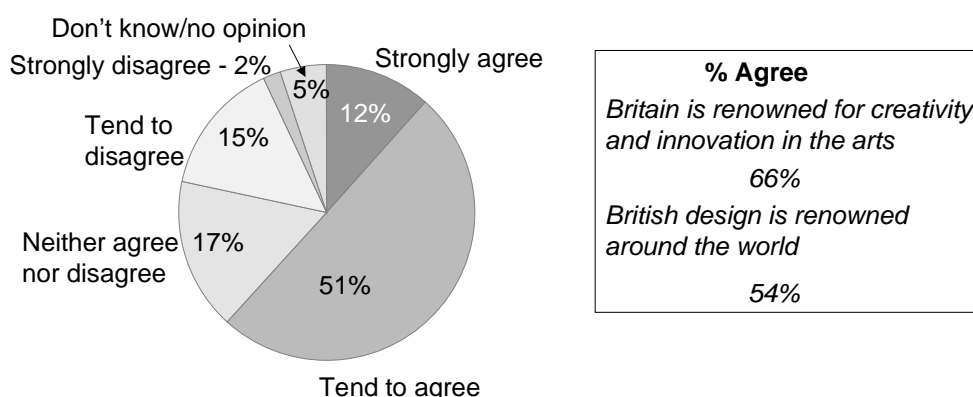
Members of the successor generation in South Africa are more likely to be positive about British Art than many of the other countries in the study, alongside countries such as Saudi Arabia and India. Two-thirds believe that Britain is renowned for creativity and innovation in the arts (66%) compared to just over half world-wide (54%). Just 9% disagree that this is the case.

More than half agree that British design is renowned around the world (54%), which is in line with the all country figure (49%) although respondents are more likely to say that they 'tend to agree' that this is the case, rather than 'strongly' agree.

However, despite these more positive views, members of the successor generation in South Africa do perceive Britain's reputation in the arts to be based more in the past than the present. Three in five believe this (62%), which is marginally less than the all country figure (66%), although encouragingly in South Africa they are less likely to 'strongly' agree (12% compared to 26% world-wide).

### 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 South African successor generation (200)

In the qualitative research, the theatre emerged as the strongest art form associated with Britain, seen as both intellectual and cultured. The actors involved are perceived to be passionate professionals whose abilities are recognised both at home and abroad. In contrast, rock music was also associated with British art.

*I think they have got very old cultural ways and they have got their theatre and their classical music, all those things are still very strong*

*They look more like monuments. They represent history. They take you back to the old times and then you get to appreciate the Art*

*They are more humble, they are a lot more intelligent. You have to think about their humour, a lot more in-depth than the Americans*

In line with the all country figures, many members of the successor generation in South Africa are unable to name any contemporary British artists (64%). Andrew Lloyd-Weber receives the most nominations (10%). This is in contrast to the world-wide figure where he receives only 1% of the mentions. South Africa also appears to be one of the few countries in this study where Rowan Atkinson (alias Mr Bean) has achieved recognition, nominated by 5% (nominations are highest in Saudi Arabia and Malaysia – 12% and 10 % respectively).

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### Leading British Artists (Spontaneous)

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

	%
Andrew Lloyd-Weber	10
Elton John	6
Mr Bean/Rowan Atkinson	5
Hugh Grant	5
Paul McCartney	3
William Shakespeare	3
David Hockney	2
Simply Red	2
Spice Girls	2
Sarah Brightman	2
Cliff Richard	2
Michael Caine	2
Elizabeth Hurley	2
Don't know	64

All other answers 1% or less

Base: All South African successor generation (200)

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British pop musicians are more well-known in South Africa than our artists; only around a quarter are unable to name contemporary British pop musicians (26%). This is the same story world-wide. The Spice Girls are once again a popular choice, achieving recognition levels behind only those in China and Germany. Elton John is nominated by one in five (20%). Other artists fall somewhat behind. Achieving between 7% and 8% recognition are The Beatles, Oasis, Sting and Simply Red.

On balance, South African members of the successor generation are relatively more likely than average world-wide to nominate a wider variety of British pop musicians, including several more recent exports such as Robbie Williams and Blur. This is similar to the pattern which emerges in more of the European countries in this study and indicates that Britain's talented artists are achieving recognition abroad, particularly in largely English speaking nations.

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### **Leading British Pop Musicians (Spontaneous)**

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

	%
Spice Girls	25
Elton John	20
The Beatles	8
Oasis/Liam or Noel Gallagher	8
Simply Red/Mick Hucknall	7
Sting	7
Rolling Stones/Mick Jagger	6
Paul McCartney	5
George Michael	5
Phil Collins	4
U2/Bono	4
Queen/Freddy Mercury	4
Robbie Williams	4
Blur	3
Cliff Richard	3
Cranberries	3
Don't know	26

All other answers 2% or less

Base: All South African successor generation (200)

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## British Personalities

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

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### 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
	%	%	%
Spice Girls	96	76	79
Tony Blair	94	87	93
Naomi Campbell	91	35	39
Hugh Grant	91	71	78
Robin Williams	79	22	28
Rowan Atkinson	75	69	92
Kate Winslet	73	46	63
Richard Branson	59	49	83
Linford Christie	56	42	75
Tim Henman	44	37	84
Liam Gallagher	34	23	68
Stephen Hawking	31	13	42
Vivienne Westwood	25	14	56
John Galliano	20	7	35
Stephen Shaw	19	6	32
David Hockney	13	8	62
William Hague	12	9	75
Damian Hirst	11	5	45
P D James	8	6	75
Delia Smith	8	5	63
James Dyson	7	4	57
Anita Roddick	5	2	40
None of these	0	2	
Don't know	1	3	

Base: All South African successor generation (200)

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Tony Blair may be disappointed to learn that he is 'piped at the post' by the Spice Girls as the most recognised British 'celebrity' - 96% have heard of the Spice Girls, 94% Tony Blair. In fact, though, the difference between the two is not statistically significant. Hugh Grant and Naomi Campbell are recognised by nine in ten (91%), Robin Williams, Rowan Atkinson and Kate Winslet are all recognised by around three-quarters.

Encouragingly, amongst those who have heard of each person, as we found world-wide, Tony Blair beats the Spice Girls as the personality who people are most likely to be aware is British (87% versus 76%). Relatively fewer recognise Naomi Campbell and Kate Winslet as British, despite being well-known overall (35% and 46% respectively). In fact Rowan Atkinson is more likely to be recognised as British than either Naomi Campbell or Kate Winslet. Disappointingly perhaps, one in five believe Robin Williams to be British. On balance, however, in South Africa these personalities are relatively more likely to be recognised as British than they are across most of the other countries measured, although Stephen Hawking is one exception.

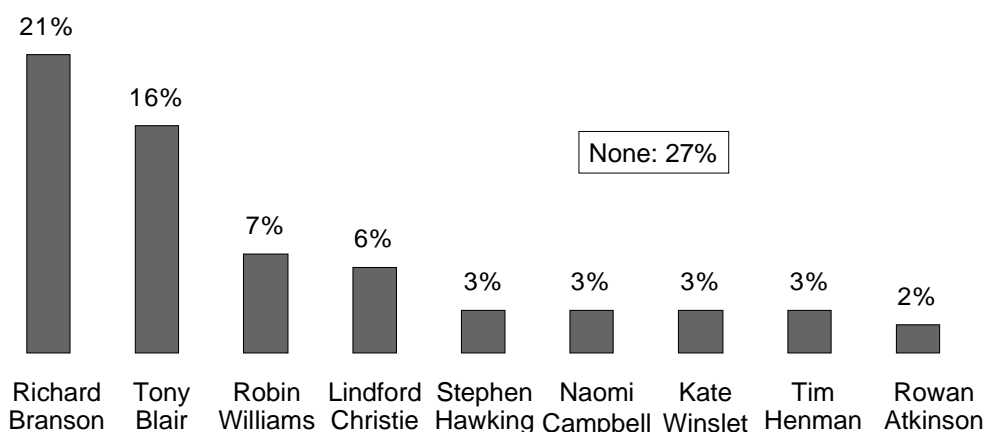
The third column in the table above shows, for each person, the proportion among those who recognise the name, who also know that they are British. Tony Blair is most likely to be recognised as British as is Rowan Atkinson, despite the fact that fewer people have heard of him.

As a note of caution, it should be noted that a 'red herring' was inserted into the list - Stephen Shaw from the British Council in the UK. Stephen achieved a 19% recognition factor in South Africa, with over a quarter of those people 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 (George Bernard Shaw perhaps), or perhaps it is simply a case of over-claiming - a respondent pretending that they know someone just because they feel that they ought to. In this case, it is more likely to be the first explanation, as Stephen achieved higher levels of recognition than other genuine British 'celebrities' such as Anita Roddick or Delia Smith. There is no obvious reason why someone might make up knowledge of Stephen Shaw but admit that they have never heard of David Hockney, or William Hague.

In contrast to the world-wide figures, Richard Branson emerges as the most positive British role model (21%), ahead of Tony Blair (16%). This is in contrast to the world-wide picture, where Tony Blair is the clear leader as a role model. Over a quarter however, do not feel that any of the personalities listed represent a positive role model for them (27%).

## Role Models

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



Base: All South African successor generation (200)

## Britain's Relationship with other Countries

In contrast to the world-wide figures, members of the successor generation in South Africa perceive Britain as placing fairly equal value on its relationship with the Europe, the United States and the Commonwealth. The all country figures indicate that the greatest value is placed on Britain's relationship with the United States. Nine in ten say Britain values the relationship with Europe 'very much/fair amount' (90%); over half say 'very much' (54%). However, the value placed on the relationship with the United States is only marginally less – 88% with 51% saying 'very much'. The equivalent figures for its relationship with the Commonwealth are 88%; 50% say Britain values the relationship 'very much'.

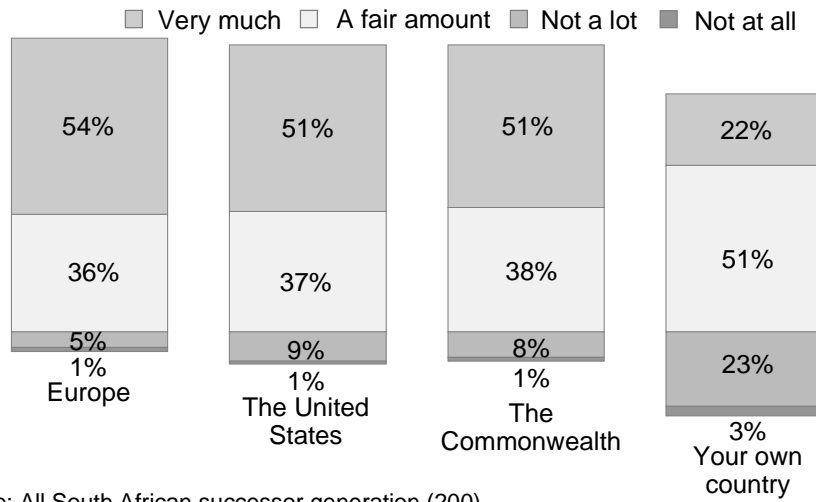
Despite the marginally higher value that Britain is perceived to place on its relationship with Europe, the picture which emerges from the discussion groups focuses around the relationship with the United States, with Britain seen to follow America's lead rather than its own making decisions.

*I think whatever America decides the British tend to follow*

In common with the other countries measured in this study, there is a perception that Britain values its relationship with their own country less than Europe, the Commonwealth or the United States. Almost three-quarters say that Britain valued its relationship with South Africa (73%), which is higher than the all country average (61%), but still less than the perceived value placed on Britain's relationship with the USA, the Commonwealth and Europe.

## Relationships Between Countries

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



Base: All South African successor generation (200)

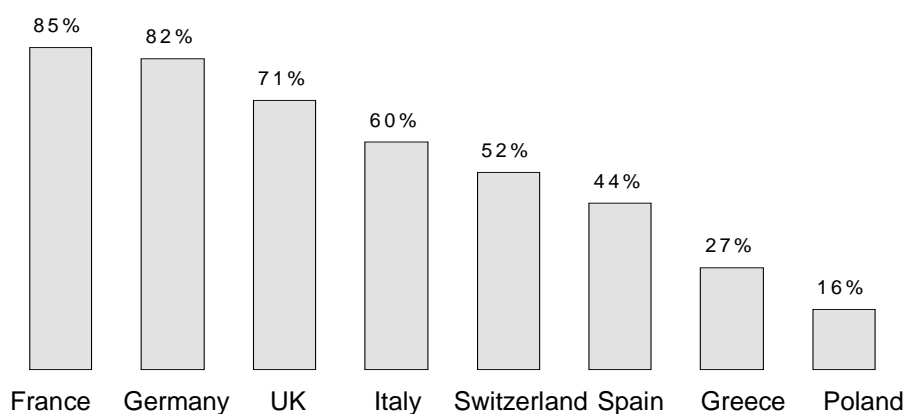
## The European Union

France, Germany and the United Kingdom are the most commonly recognised members and the European Union. Three in five know that Italy is a member, while half wrongly believe that Switzerland is part of the union, above Greece. In line with the all country average, 16% in South Africa think incorrectly that Poland is too.

Although, seven in ten recognise that the United Kingdom is part of the European Union (71%), this is lower than the all country average of 80%, and leaves a significant minority who do not (29%).

### 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.



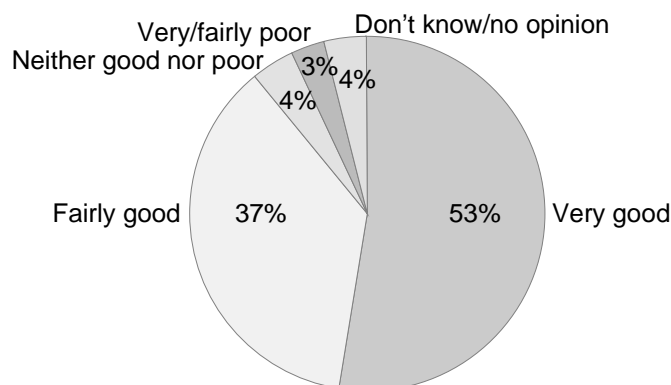
Base: All South African successor generation (200)

## Education

In line with the all country results, the majority of members of the successor generation in South Africa rate the overall quality of British higher education as good (90%). Indeed, over half say it is 'very' good (53%). Only 3% view it as poor.

## Quality of British Education

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



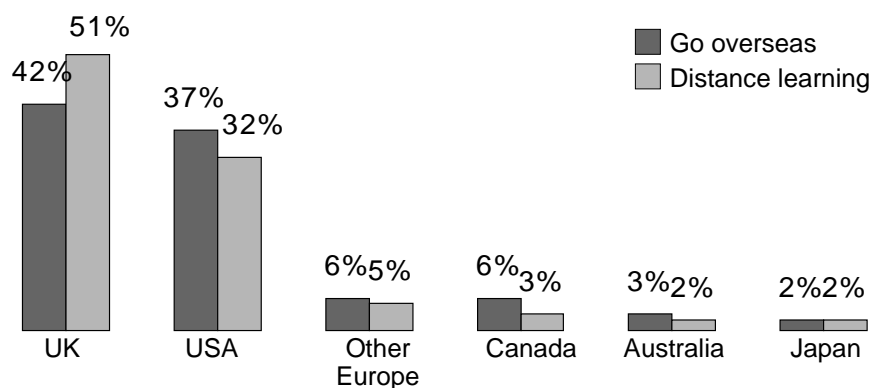
Base: All South African successor generation (200)

Given the choice, members of the successor generation would choose the United Kingdom as a place to study over the United States. South Africa is one of only three countries in this study where this is the case – Malaysia and Russia are the other two. The United States is still a popular choice, though, nominated by over a third.

For distance learning courses the United Kingdom remains the top choice by around a half, the United States is second, chosen by a third.

## 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 South African successor generation (200)

The findings of the qualitative research show that, while overall the British educationalist is believed to be highly educated, cultured and able to communicate his knowledge well, he is also perceived to be rigid and uncreative. The general perception is that the teaching methods would be fairly old fashioned and little discussion would take place between teachers and students. In contrast, American teachers are seen to have a more open and relaxed approach, encouraging open thinking and creativeness. Despite this, the quantitative results demonstrate that the United Kingdom would be the preferred choice to study over the United States, perhaps this is because the English culture is seen to be more in line with the South African one.

Despite choosing the United Kingdom as the place where members of the successor generation would like to study, British educational qualifications are perceived to have only marginally more credibility with employers than ones from the United States (44% versus 42%). The proportion who opt for British qualifications having the most credibility is significantly higher than the world-wide figures (23%), however.

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### **Credible Qualifications**

**Q8 Thinking specifically about educational qualifications, a qualification from which one of these countries do you think would have the most credibility with potential employers ?**

	%	World-wide %
UK	44	23
USA	42	58
Home country	5	6
Japan	2	5
Canada	4	3
Australia	2	2
Don't know	3	3

Base: All South African successor generation (200)

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In line with the all country figures, over three-quarters feel that the British themselves are well educated, particularly those aged 20-25 years. By way of contrast, only 8% believe we 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?**

		<b>World-wide</b>
	<b>%</b>	<b>%</b>
Very well educated	18	23
Fairly well educated	59	53
Neither well nor poorly	14	17
Fairly poorly educated	7	4
Very poorly educated	1	1
Don't know	3	3

Base: All South African successor generation (200)

## Languages and the English Language

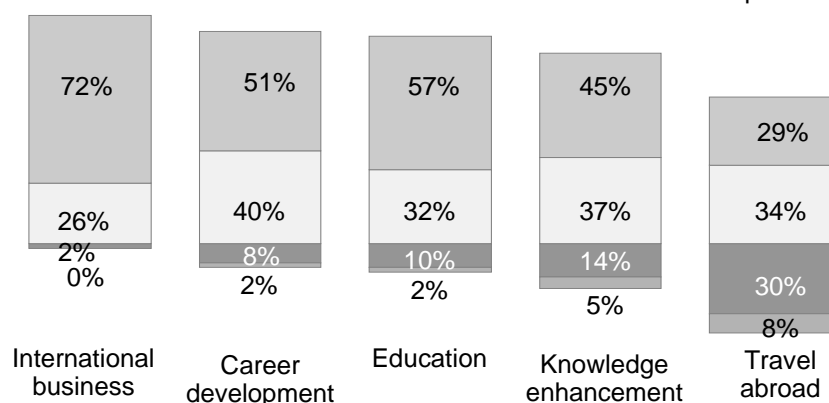
Few members of the successor generation speak a language other than English; 8% speak German, 6% French and 3% Spanish. French is the language most would like to be able to speak (62%), followed by German (39%) and Spanish (25%).

The ability to speak English is perceived to be most important for international business – 72% feel it is crucial, in line with world-wide figures. Relatively more than the all country average believe it is crucial for education – 57% - however slightly less say it is crucial for travel abroad compared to world-wide results. On balance, members of the successor generation place slightly more importance on the ability to speak English for knowledge enhancement – 45% say it is crucial compared to 37% world-wide. The same can be said about the importance for career development.

## 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 South African successor generation (200)

## Sources of Information about Countries

As one might expect, people use a wide variety of information sources when finding out about other countries. At least three in ten South African members of the successor generation rank word of mouth (friends and family), people who have visited that country, local TV news, local press and international TV highly.

Visiting the country is ranked as the single most influential source, followed by word of mouth, people who have visited the country and local TV news.

When considering sources of information specifically about the United Kingdom answers are similar to those above. Notably, however, one in five mention the BBC World TV.



## 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.**

	<b>Q1a</b>	<b>Q1b</b>	<b>Q32</b>
	<b>Important</b>	<b>Most Influential</b>	<b>Most important for UK</b>
Word of mouth - friends & family	46	14	29
People who have visited that country/the UK	43	12	28
Local press	34	4	24
Local/national TV news	34	12	19
International TV/other international TV	32	10	10
Books	29	6	19
Visiting the country/the UK personally	29	18	27
Films	24	4	15
International press/other international press	23	5	11
Media (press, TV, radio) from that country	22	6	n/a
Know people from that country/the UK	16	6	10
Local radio	14	1	1
Word of mouth - work colleagues	12	1	7
Tourist authorities from that country/in the UK	9	2	2
Other local TV	7	1	n/a
International radio/other international radio	2	0	2
Other official (UK) sources from that country	2	0	1
Internet	2	1	3
BBC World TV	n/a	n/a	21
British press	n/a	n/a	8
BBC World Service	n/a	n/a	8
Other	1	0	1
Don't know	0	0	4

Base: All South African successor generation (200)

Around one in five members of the successor generation in South Africa have visited the United Kingdom once and a similar proportion have visited more than once. However, around three in ten have never visited (62%).

# Implications

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## **British Business**

On balance, South African members of the successor generation are fairly positive about British business overall. However, as many of the other countries in this study, they do identify areas which need to be developed before our businesses will be held in the same high regard as businesses in countries such as Japan and the United States. Overall, the factors which relegate our British businesses to below those of countries such as these are a lack of innovation and creativity. This is a common finding across all the countries measured. With respect to British science and technology, similar issues result in our perceived poor performance in this area, relative to the other countries measured.

Our products and services are rated highly, as are our managers. Though generally well regarded, the workforce is not held in such high esteem and indeed receives one of the lowest ratings world-wide.

However, a significant minority of members in South Africa are undecided with respect to British business. They represent an audience who could perhaps, in the future, as a result of future campaigns, become more positive about the British business environment.

## **British Society**

Although British society is seen as largely traditional by members of the successor generation in South Africa, tradition and cultural heritage are not as frequently mentioned as a weakness or a strength as they are in some of the other countries in this study.

Our national health service, our government and our legal system are all viewed positively amongst members in South Africa. We are also viewed as being a 'multi-cultural' society. However, our welfare system is not viewed in such a positive light. British society overall is perceived to be racially tolerant, on balance, and without discrimination to women, although a significant minority do not feel we are racially tolerant. In addition, in line with the view world-wide, the British people are not seen as particularly welcoming to foreigners. Indeed, the prevalent image that emerged from the discussion groups is one of a reserved nation who would not necessarily go out of their way to make visitors feel at home.

South African members of the successor generation hold fairly negative views with regard to the truthfulness of British media, indeed one of the most negative views out of all the countries measured. However, the quality of our media is thought to be better than the quality of their own.

The relationship between Britain and South Africa is thought to be valued quite highly, relative to other countries in the study. This is perhaps a result of our colonial links with South Africa. However, the relationship is thought to be valued less than the relationship with either Europe, the United States or the Commonwealth.

### **British Art**

British Art is seen in a particularly positive light by members of the successor generation in South Africa, in terms of its creativity and innovation, alongside countries such as Saudi Arabia and India. Our reputation, however, is definitely seen as being based more in the past than the present. This is despite South Africans being able to name more contemporary pop musicians than many other countries in this study.

### **British Education**

Members of the successor generation in South Africa would choose the United Kingdom as a place to study above the United States. This is the case in only two other countries in this study – Malaysia and Russia; in the remainder the United States is the top choice. Despite the fact that members would be more likely to opt to study in the United Kingdom, our qualifications are perceived to be only marginally more credible than those from the United States.

### **How to communicate with the South African successor generation**

Members of the successor generation in South Africa use a variety of sources to gain information about different countries. Thinking specifically about the United Kingdom the most influential sources are visiting the country itself, talking to those who have visited the United Kingdom, as well as word of mouth (friends and family). Sources that are mentioned which could perhaps be exploited, at least to a certain degree, are local press, BBC World TV, local and national television, books and films. Indeed, South Africa is one of the countries where the BBC World television service receives the most mentions. However, it should be remembered that the British media is generally not thought to be truthful in South Africa and thus is perhaps not a information source which should be utilised unless the image of our media's honesty can be improved.

In terms of potential role models to communicate positive messages about Britain, Richard Branson receives the most mentions, though he is less well known than some other personalities, like Tony Blair. Indeed South Africa and France are the only two countries where Richard Branson receives a significant proportion of nominations. Tony Blair is also seen as a role model, as he is world-wide, although not to quite same degree as Richard Branson.







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# Appendices

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## 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 225 respond with a particular answer, the chances are 95 in 100 that this result would not vary more than six percentage points, plus or minus, from a complete coverage of the entire population using the same procedures.

<b>Size of sample on which survey result is based</b>	<b>Approximate sampling tolerances applicable to percentages at or near these levels</b>		
	<b>10% or 90%</b>	<b>30% or 70%</b>	<b>50%</b>
	±	±	±
3,000	1.1	1.6	1.8
1,000	1.9	2.8	3.1
225	3.9	6.0	6.3

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.

<b>Size of the samples compared</b>	<b>Differences required for significance at or near these percentage levels</b>		
	<b>10% or 90%</b>	<b>30% or 70%</b>	<b>50%</b>
	±	±	±
175 vs 50	9.4	14.4	15.7
115 vs 110	7.8	12.0	13.1

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

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

