

# British Icon Index II

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How home-grown brands, industries and institutions carry the story of modern Britain to the world

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2018

Populus



# Foreword

Over the coming months there will be countless column inches devoted to Brexit and how the terms and manner of the UK’s departure from the European Union will affect the nation’s global standing. However, the reality is that while 29th March 2019 will be the focus of close attention in our corner of the globe, the rest of the world will be moving on. Regardless of the type of Brexit the UK ends up with, the story of Global Britain will still need to be told.

Open, outward-looking, trusted, successful, admired – these are the qualities the UK aspires to. But how does the country carry that message now and beyond Brexit? For most ordinary people across the world, perceptions of the UK and what it stands for are governed by interactions with our most high profile, longstanding and cherished brands, industries and institutions – our icons. In order to determine which of these carry the UK’s global story most effectively, we resolved to reprise an analysis we first conducted in 2015, but this time on a much larger scale.

We asked over 20,000 people from across 20 different countries around the world – from established G20 powerhouses to emerging nations – for their views towards ten of the UK’s most well-known brands and icons. In each interview, respondents were asked to rate each icon on a range of criteria, from being modern and exciting to being trusted and globally recognised. We then analysed the results to find the “X factor” – that hidden attribute which came closest to combining all of the positive qualities we had tested. How much of this “X factor” each icon has is what determines its place in our **British Icon Index\***.

The results are clear. Happily, the UK can be confident that it has a range of icons that carry the story of Global Britain very effectively. The likes of Rolls-Royce, Jaguar Land Rover and the BBC have particularly high scores, with the latter’s influence particularly strong in countries with long-standing cultural ties to the UK. However, as in 2015, the Premier League is the country’s most impactful performer overall. The League’s global appeal, its ability to engage people en masse regardless of their background, its reach within developing economies with growing middle classes, and its more rounded performance across the different measures, means it is Global Britain’s best advertisement.

In particular, the Premier League is able to reach young affluent people – both male and female – more successfully than any other icon. As the UK looks to the future, it can be confident that in the Premier League the country has a brand that can positively engage the leaders of tomorrow in the markets where UK plc must compete.



Rick Nye  
Principal Director, Populus

# Highlights

**The Premier League is top of the British Icon Index II league table**, with Rolls-Royce second and Jaguar Land Rover third.

**People don’t have to like the UK to like the Premier League, but the Premier League makes people more favourable towards the UK:** over two thirds of those polled say that the Premier League makes them think better of the country, more than for any other icon. This proportion rises to 77% among young affluents and 87% among those interested in the Premier League.

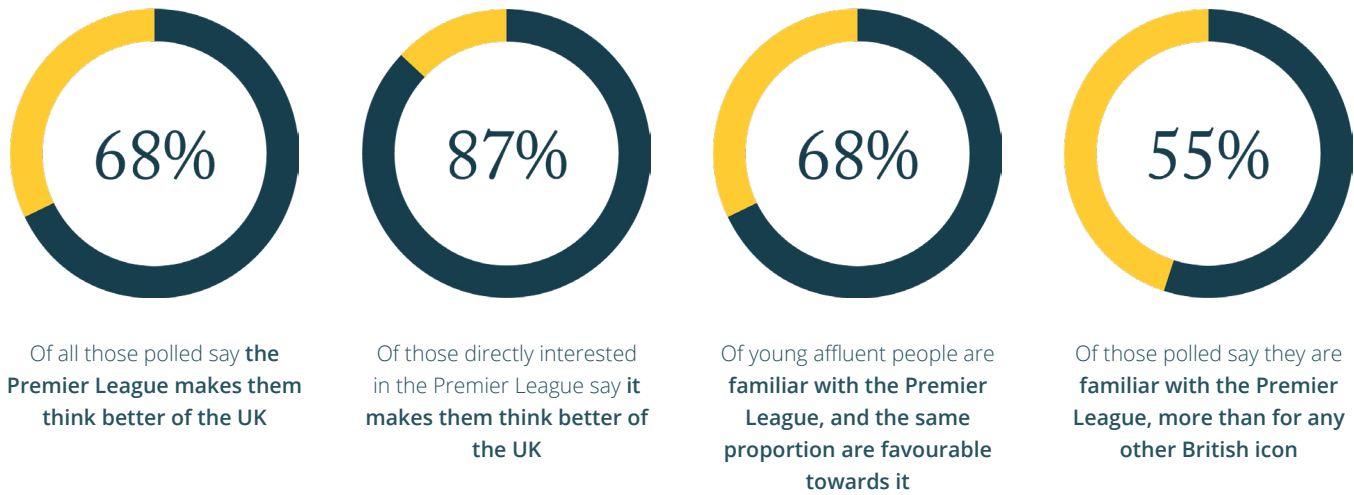
**The Premier League’s position is predicated on its consistent performance across key demographics.** It is top among: men; every age group under 45; all affluent adults; affluent men; affluent 18-34s; and affluent female 18-34s.

**The Premier League has a stronger, more rounded performance across the attributes tested** – the result of the higher ‘familiarity’ and ‘favourability’ scores that the League’s global profile generates.

**Icon Index rankings vary by individual market:** the Premier League performs best where football is most popular: in Africa, the Middle East and Southeast Asia. In other markets, Rolls-Royce, Jaguar Land Rover and the BBC perform best.



























**On average, British icons perform better in emerging economies.** British brands and institutions are more favourably regarded in African and Southeast Asian markets; they perform less well overall in mature economies such as Norway and the USA.

**Those interested in the Premier League are more outward looking.** They are more likely than adults in these markets overall to be favourable towards countries other than their own, to be familiar with all the British icons tested, and to be more positive towards the UK when considering each icon.



The British Icon Index II  
League Table

The British Icon Index rates how well different British icons, institutions and brands combine the qualities the UK wants to project, from being successful and admired to being trusted, modern and globally recognised.

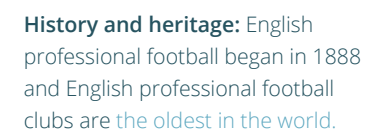
		North America	South & Central America		Europe		Middle East & North Africa				Sub-Saharan Africa			Asia & Oceania							
																					
	All	USA	Mexico	Brazil	Norway	Russia	Egypt	Morocco	Saudi Arabia	UAE	Nigeria	Kenya	South Africa	India	China	Hong Kong	Malaysia	Thailand	South Korea	Indonesia	Australia
	1	9	2	5	4	3	1	1	2	3	1	1	5	5	4	5	1	1	1	1	9
	2	1	1	3	3	1	7	4	4	1	5	6	3	2	2	4	2	4	3	6	1
	3	2	6	1	7	2	5	2	3	2	6	4	1	3	5	6	3	5	4	3	6
	4	3	5	4	1	7	4	5	6	6	2	3	4	1	6	2	7	3	2	4	2
British Universities	5	5	4	2	6	4	2	3	1	4	4	5	6	6	1	3	4	2	5	2	7
	6	4	8	7	8	6	3	6	5	5	3	2	2	4	7	7	5	6	8	5	4
British Music	7	7	3	6	2	5	9	8	10	9	8	8	7	9	8	8	8	7	6	7	3
British Film	8	8	9	9	5	8	8	7	8	8	7	7	8	8	9	9	9	9	10	9	5
	9	10	7	8	10	10	6	10	7	7	10	10	10	7	3	1	6	8	7	8	10
The Monarchy	10	6	10	10	9	9	10	9	9	10	9	9	9	10	10	10	10	10	9	10	8

**The Premier League, Rolls-Royce and Jaguar Land Rover are the UK's best performing icons.** The Premier League's global reach means it has consistently high scores across almost all the markets analysed, with an overall average of 78.1/100. Meanwhile Rolls-Royce (77.0) and Jaguar Land Rover (76.3) benefit from global consumer marketing activity and strong, rounded reputations.

**Icon Index rankings vary by individual market.** The Premier League tends to do best where football is a popular and established pastime – Africa, the Middle East, and Southeast Asia – and especially where the UK has fewer existing ties to those markets. In countries with more developed domestic sports markets (e.g. Australia) and / or stronger cultural links to the UK (e.g. India and the USA), older British brands and institutions such as the BBC perform better.

**Overall, British icons perform better in emerging economies.** The highest average icon score is in Thailand (80.9/100), followed by Indonesia (80.0) and Nigeria (79.4). The lowest average icon scores are in Russia (62.9), Norway (63.0), and the USA (64.7).

Key



**Talented players from around the world:** 108 Premier League players were at this year's World Cup, 30 more than the next most represented league (La Liga in Spain). In all, **122 nationalities** have been represented in the Premier League since its inception

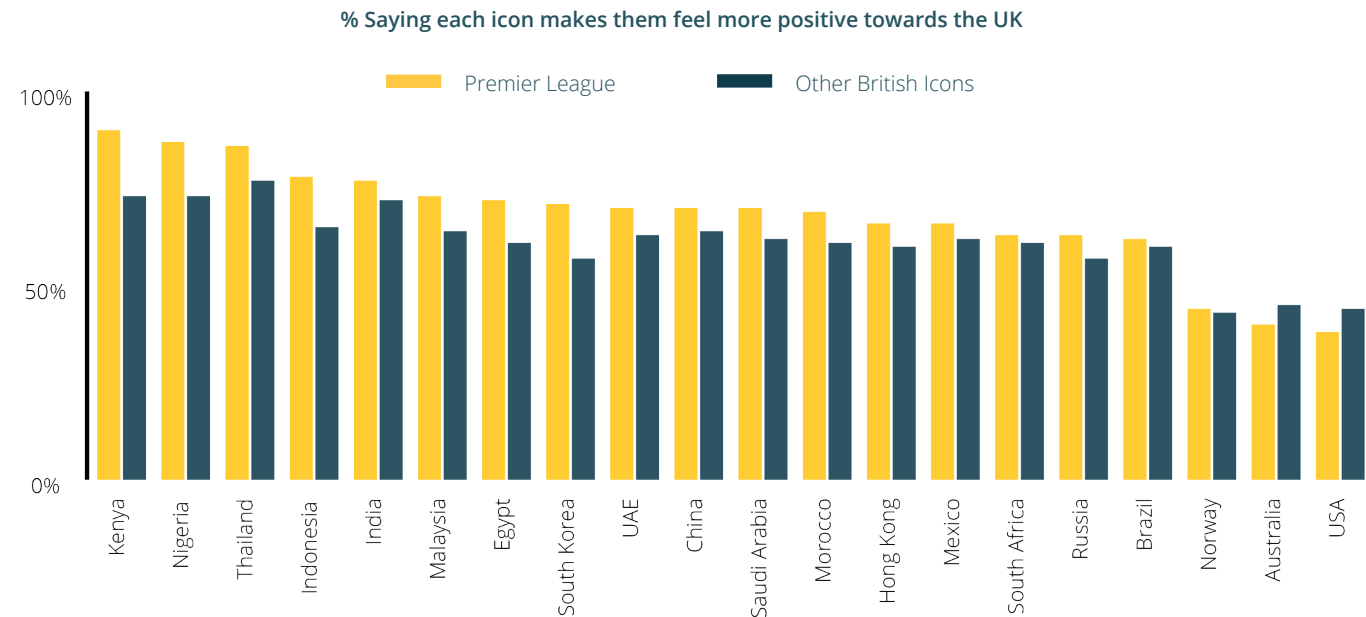
**Full stadiums:** in the 2017/18 season the Premier League had 96% stadium occupancy and a record average attendance of 38,495

**International engagement:**  
the Premier League is broadcast  
in one billion homes in 189  
countries. Its clubs have over 350  
million followers combined across  
Facebook, Instagram and Twitter.  
5.9 million people play its Fantasy  
Premier League game

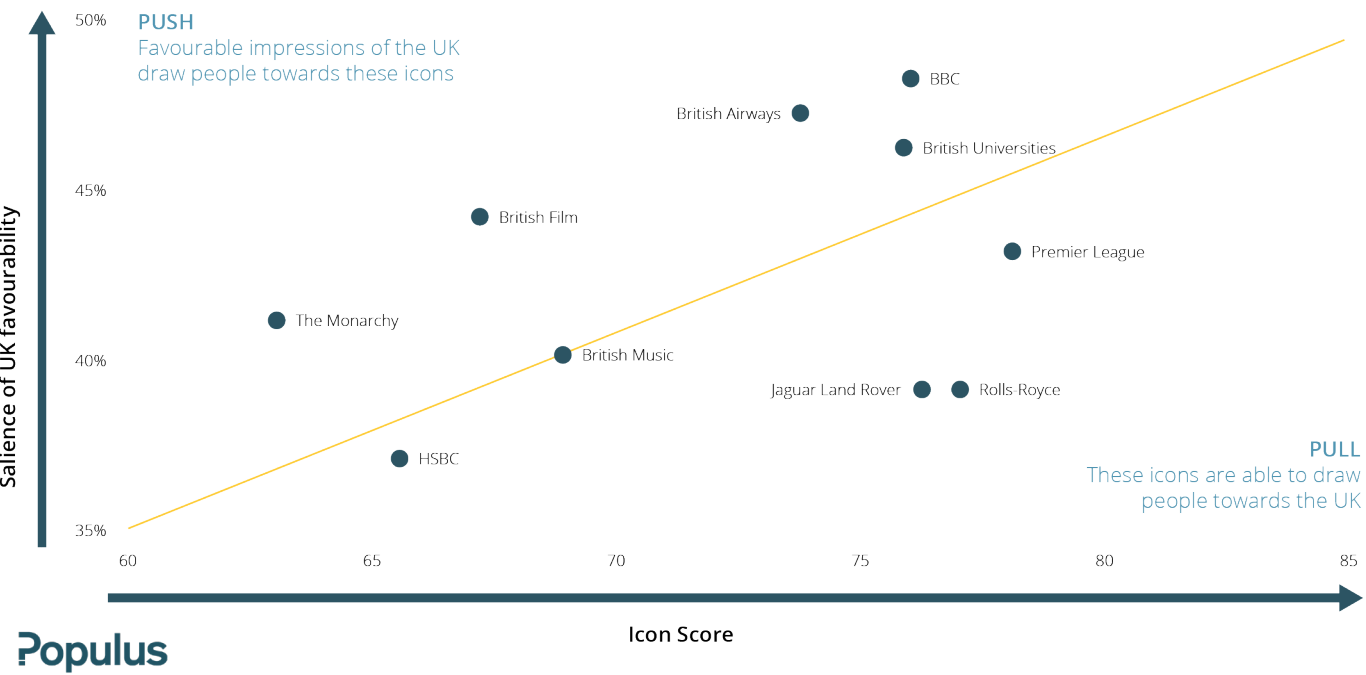
# The Premier League’s influence on attitudes towards the UK

All the British icons tested have a positive influence on attitudes towards the UK. The Premier League is the most influential icon: **68%** of those polled said the League makes them think better of the UK.

The impact of the Premier League is strongest in emerging economies with a passion for football: **Kenya (90%), Nigeria (87%)** and **Thailand (86%)**. Importantly, however, it performs consistently across the markets polled. The Premier League’s score is higher than the average icon score in every country except Australia and the USA, mature economies with very strong domestic sports markets, lower levels of interest in football, and long-established links with the UK.



The Premier League often makes people think better of the UK. However, the chart below shows that the Premier League’s effect as an icon does not rely on existing favourability towards the UK. Because you don’t have to like the UK in order to like the Premier League, the League has the power to ‘pull’ people towards the UK.

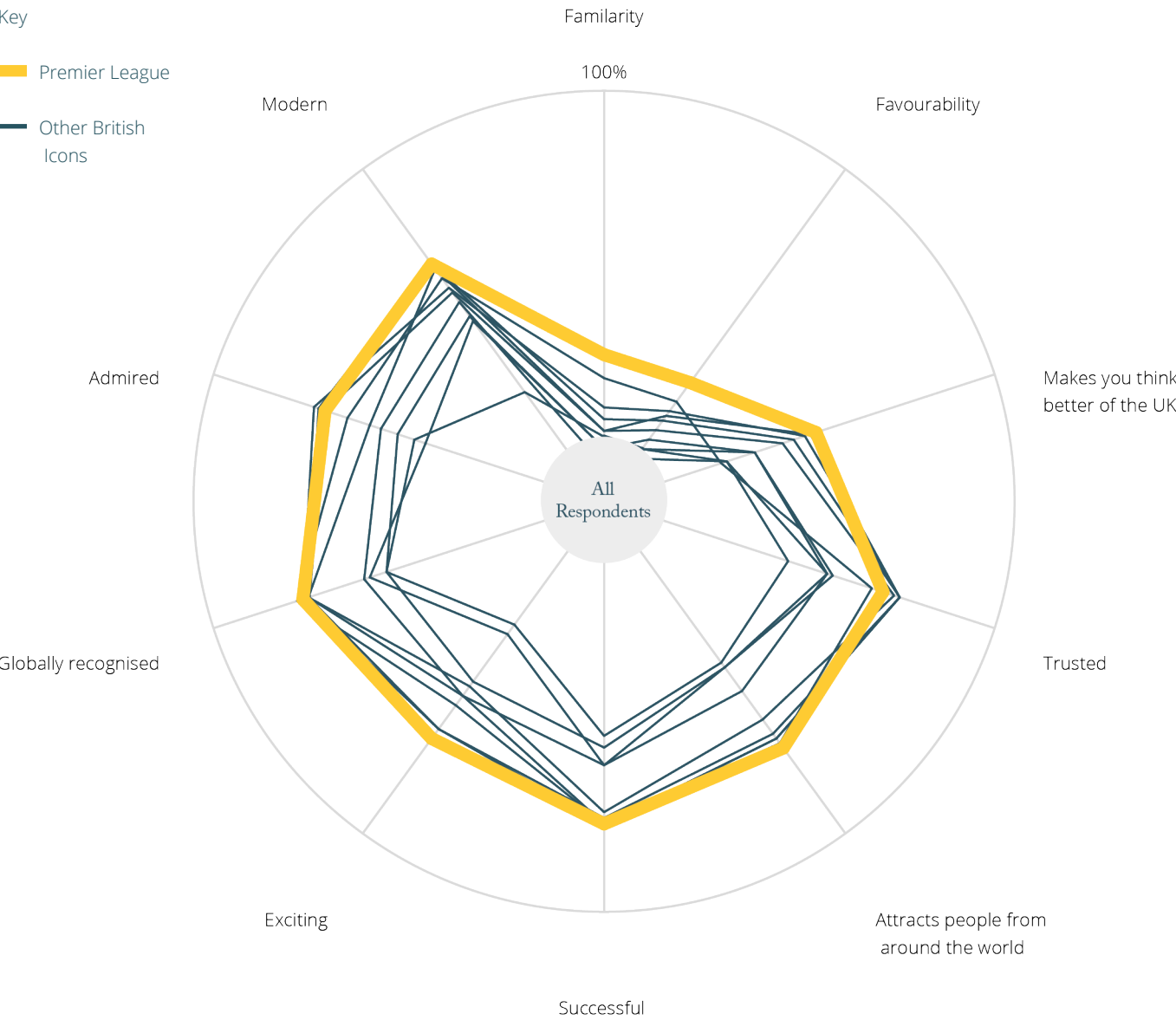


## Icon profiles

Analysing the performance of the different icons across the attributes tested reveals why the Premier League is top of the table.

The Premier League outperforms all other icons on several metrics, and its consistently strong scores across all the qualities measured give it a more rounded profile. The Premier League’s reach is a key differentiator: while other icons are globally recognised, international audiences are more likely to be familiar with the League.

**% Across the countries polled associating quality with icon**



“The Premier League is far and away better than any other football league around the world. I don’t like it because it’s popular, I like it because it’s different, it’s English, it’s their thing and the more it’s their thing, the more the way they do it the way it’s supposed to be done, the more I like it.”

Los Angeles Premier League fan, 2017

“The Premier League makes the UK one of the must-visit destinations.”

Malaysia Premier League fan, 2018

“The Premier League says that the UK is high-end and high quality.”

Beijing Premier League fan, 2016

The young affluent perspective

Young affluent people are the business and political leaders of tomorrow. How they view the UK's icons is a guide for how effectively the UK will be able to engage with them in the future.

Among this young affluent audience, the Premier League still tops the British Icon Index II league table. In fact, its score improves among young people (83.3/100 compared with 78.1 among all those polled).

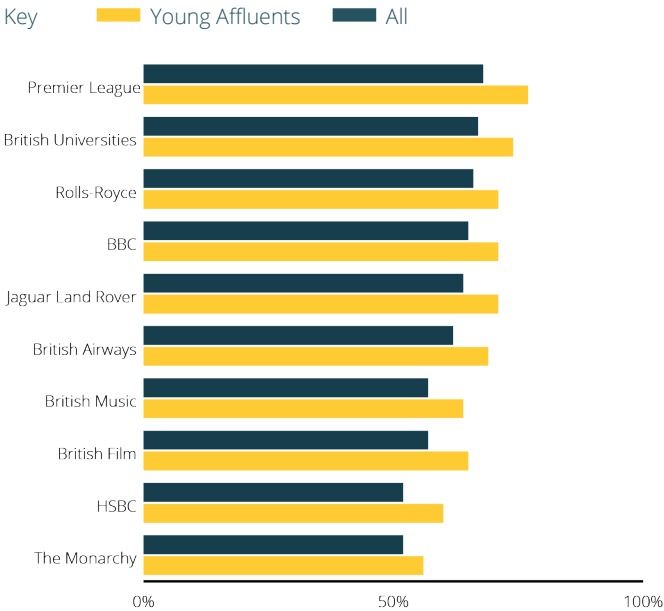
While among the total poll sample the Premier League ranks first among men but fifth among women, there is no gender difference within the young affluent audience – the Premier League comes top among both young affluent men and young affluent women.

More widely, British universities rank higher among young affluent audiences than they do overall.

The Premier League's high icon score among young affluent people is predicated on its strong performance across all the attributes tested. High levels of familiarity and favourability give the League a much more rounded profile, demonstrating that its global popularity means it has a unique ability to reach the world's future leaders.

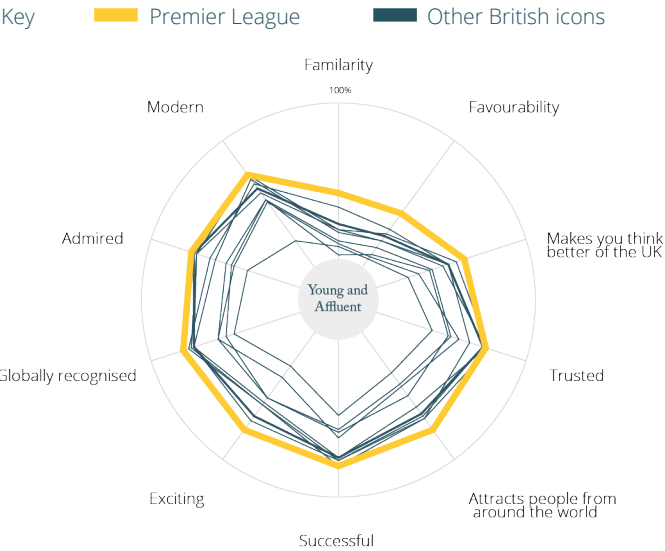
Young affluent people are consistently more likely than the total population to say that British icons make them feel more positive towards the UK, underlining their more global outlook.

% Saying icon makes them feel more positive towards the UK



	All	Affluent 18-34s	Affluent Male 18-34s	Affluent Female 18-34s
Premier League	1	1	1	1
Rolls Royce	2	4	2	5
Jaguar Land Rover	3	3	3	4
BBC	4	5	5	3
British Universities	5	2	4	2
British Airways	6	6	6	6
British Music	7	7	8	7
British Film	8	8	9	8
HSBC	9	9	7	9
The Monarchy	10	10	10	10

Icon profiles among young and affluent respondents

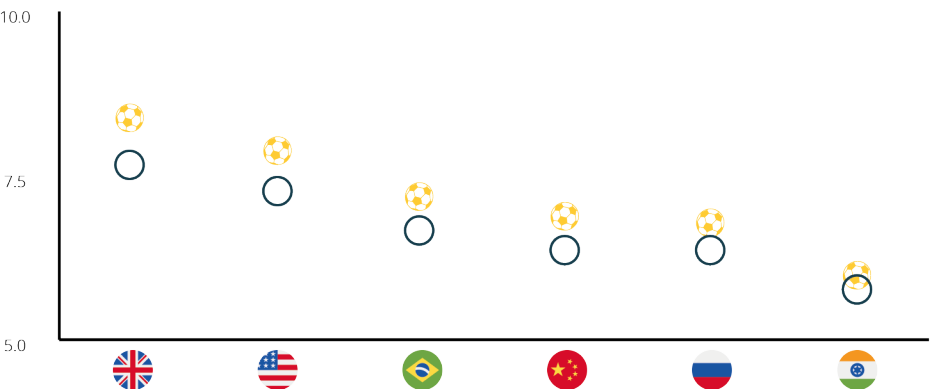


The Premier League follower perspective

Across the markets polled, people with a stated interest in the Premier League are more likely to be:

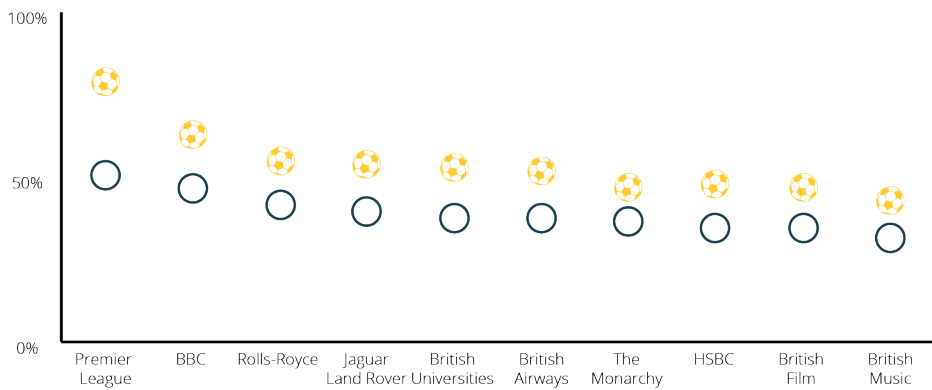
...favourable towards nations other than their own

Mean favourability scores towards each nation /10



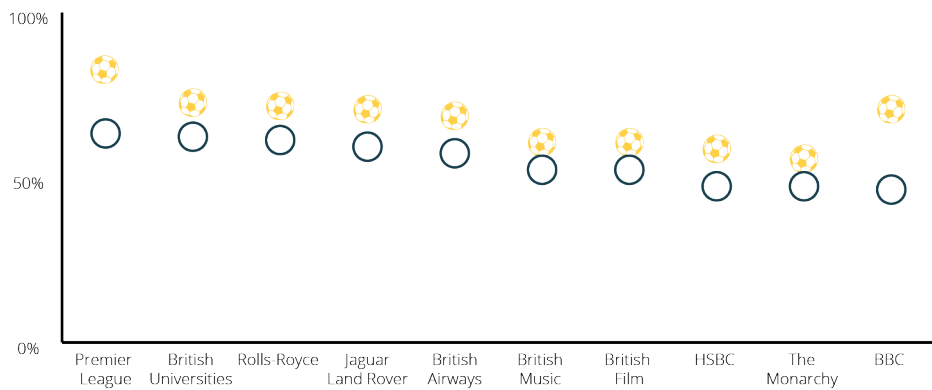
...familiar with different icons

% Who feel familiar with each British icon



...positively influenced in their views towards the UK by different icons

% Saying icon makes them feel more positive towards the UK



Key

- Those interested in the Premier League
- All respondents

Alongside broadcasting to one billion homes in 189 countries, the Premier League also engages directly with fans in market. For example:

**Premier League Live:** A Premier League experience was brought to more than 20,000 fans in Bengaluru, India

**Premier League Asia Trophy:** More than 50,000 tournament tickets were purchased as Hong Kong hosted the Premier League Asia Trophy in July 2017. Four Premier League clubs competed – Crystal Palace, Leicester City, Liverpool and West Bromwich Albion

# Our Methodology

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The Premier League conducted an online survey of **20,882 adults** in 20 international markets, with at least **1,000 interviews** in each market.

Quotas were set and post-weighting applied to make each national sample representative of either the total adult population of that country or, in countries with poorer internet penetration in rural areas, the urban adult population.

Populus used the survey to reprise its British Icon Index analysis. Respondents were asked to rate each of 10 British institutions, brand and icons (Rolls-Royce, the Premier League, Jaguar Land Rover, British Universities, the BBC, British Airways, British Music, British Film, HSBC, the Monarchy) on 10 associations / measures (admired; successful; attracts people from around the world; trusted; globally recognised; exciting; makes you think better of the UK; modern; favourability; familiarity).

We then conducted a Factor Analysis on the data. We took all the data points generated by respondents' ratings and analysed them to find the 'X factor', the hidden mathematical factor that unites all these different attributes into one measure. We then analysed each icon to determine how much of this 'X factor' each one had. The resulting values allowed us to create the British Icon Index.

Where this report refers to 'young affluents', these are defined as those who are aged 18-34 and in the top two income brackets in their country.

Where this report refers to 'Premier League-interested', these are defined as those saying they are 'interested' or 'very interested' in Premier League football.

Quotes from international fans of the Premier League included in this report have been taken from transcripts of focus groups conducted by Populus.

Other statistics quoted in this report are taken from This is Premier League – 2017/18 Season Review, the Premier League's end of season summary report.

Please note that, due to changes in the sampling approach, these results are not directly comparable with the 2015 British Icon Index.

# About Populus

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Populus is a leading research & strategy consultancy and a trusted adviser to some of the UK's biggest companies, individuals and brands. We use polling, research, evidence and expertise to provide clients with the critical knowledge they need to succeed. Our work helps them identify, understand and influence the critical issues and audiences that can make the difference between success and failure.

Since 2008 Populus has conducted an extensive programme of domestic and international research for the Premier League, developing a strategic partnership that has given the League a better understanding of its fans and key opinion formers than ever before.

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