

The British Icon Index

How home-grown brands, industries
and institutions support the story
of modern Britain

November 2015

Populus



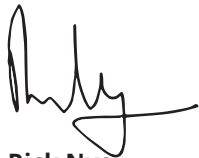
Foreword

Open, outward-looking and embracing the future; that is the sort of country we would like the world to see when it looks at the UK today. But which of our home-grown brands, industries and institutions best carries our global story? As they are sold, marketed and projected around the world, which British icons do most to promote the values we would like to put on display? Populus determined to find out.

We interviewed 4000 people in eight markets around the world ranging from established economies (the United States) through rising powerhouses (India and China) to emerging nations (Nigeria and Indonesia) and asked them to score 15 British icons (from British universities and British film to Rolls Royce, British Airways and the Premier League) against a range of measures from being admired and trusted to being successful and globally recognised. We then analysed the results, some 60,000 data points in total, 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 good news for the UK is that many of its most cherished institutions and famous brands travel well. What distinguishes the performance of the Premier League, however, is the breadth of its appeal, and in particular its ability to reach and engage a younger, more affluent global audience than all of the other icons tested. It is the most effective advertisement for what the UK wants to say about itself - modern, successful, exciting, open, inclusive, trusted - and this favourable impression is largely independent of people’s general views about the UK as a country.

You don’t have to like the UK to like the Premier League, but you are more likely to form a favourable view of the UK if you view it through the prism of Premier League football. Of the many things which the UK produces it is Premier League football that is most likely to get through to the next generation of global leaders.



Rick Nye
Managing Director, Populus

Highlights

The Premier League tops the British Icon Index league table, with British universities, the BBC and Rolls Royce second and joint third respectively.

The Premier League is also top of the British Icon Index among young, affluent people across the markets polled.

The rankings in the British Icon Index league table vary by market: wherever football is popular, the Premier League dominates; in other markets, British universities, the BBC, Jaguar Land Rover and Rolls Royce have the highest scores.

People in these key markets don’t have to like the UK to like the Premier League, but the Premier League is highly likely to make them more favourable towards the UK:









- **78% of Premier League followers are favourable towards the UK**, compared to 69% of people overall.
- **84% of those polled say that the Premier League makes them feel more positive towards the UK.** Only British universities (88%) are more likely to make people think better of the UK.
- **Among young affluent people, 90% say the Premier League makes them more positive towards the UK.** Again, only British universities (93%) have a more positive impact.

Premier League followers tend to be more outward looking. Across the markets polled, those with a stated interest in the Premier League are more likely to:

- Be positive towards countries other than their own.
- Be familiar with all the British icons in the poll.
- Feel more positive towards the UK when considering each icon.

The British Icon Index 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.

	Total	 Nigeria	 Qatar	 India	 China	 Hong Kong	 Thailand	 Indonesia	 USA
English Premier League football	1	1	3	5	2	3	1	1	7
British universities	2	4	4	6	4	1	2	2	5
Rolls Royce	3	7	2	3	1	5	10	7	1
The BBC	4	2	5	1	11	4	5	4	3
Jaguar Land Rover	5	6	1	4	3	11	8	3	2
British Airways	6	3	6	2	6	6	7	6	4
HSBC	7	12	7	7	5	2	9	8	13
British film	8	8	9	9	10	9	4	9	8
British music	9	10	11	11	8	8	3	5	6
British fashion	10	9	10	10	7	10	6	10	10
The British Council	11	5	8	8	13	7	11	11	14
The Monarchy	12	11	13	14	9	13	14	12	9
Harrods	13	14	12	15	15	12	12	13	11
BP	14	13	15	13	12	15	15	14	12
JCB	15	15	14	12	14	14	13	15	15

The Premier League tops the table. The Premier League has an Icon Index score of 81.0 out of 100, making it consistently the best performer of the 15 brands, industries and institutions across all the markets polled. British universities come second (80.0), with Rolls Royce third on 77.9.

The overall picture is consistent across demographic groups: the Premier League is top among men, second among women, and in the top two for every age group up to 55.

The Premier League performs particularly strongly among young affluent people. Among 18-34 year olds in the top income brackets of their markets, the Premier League has an even higher index score (85.7) and is once again top, just ahead of British universities on 85.1.

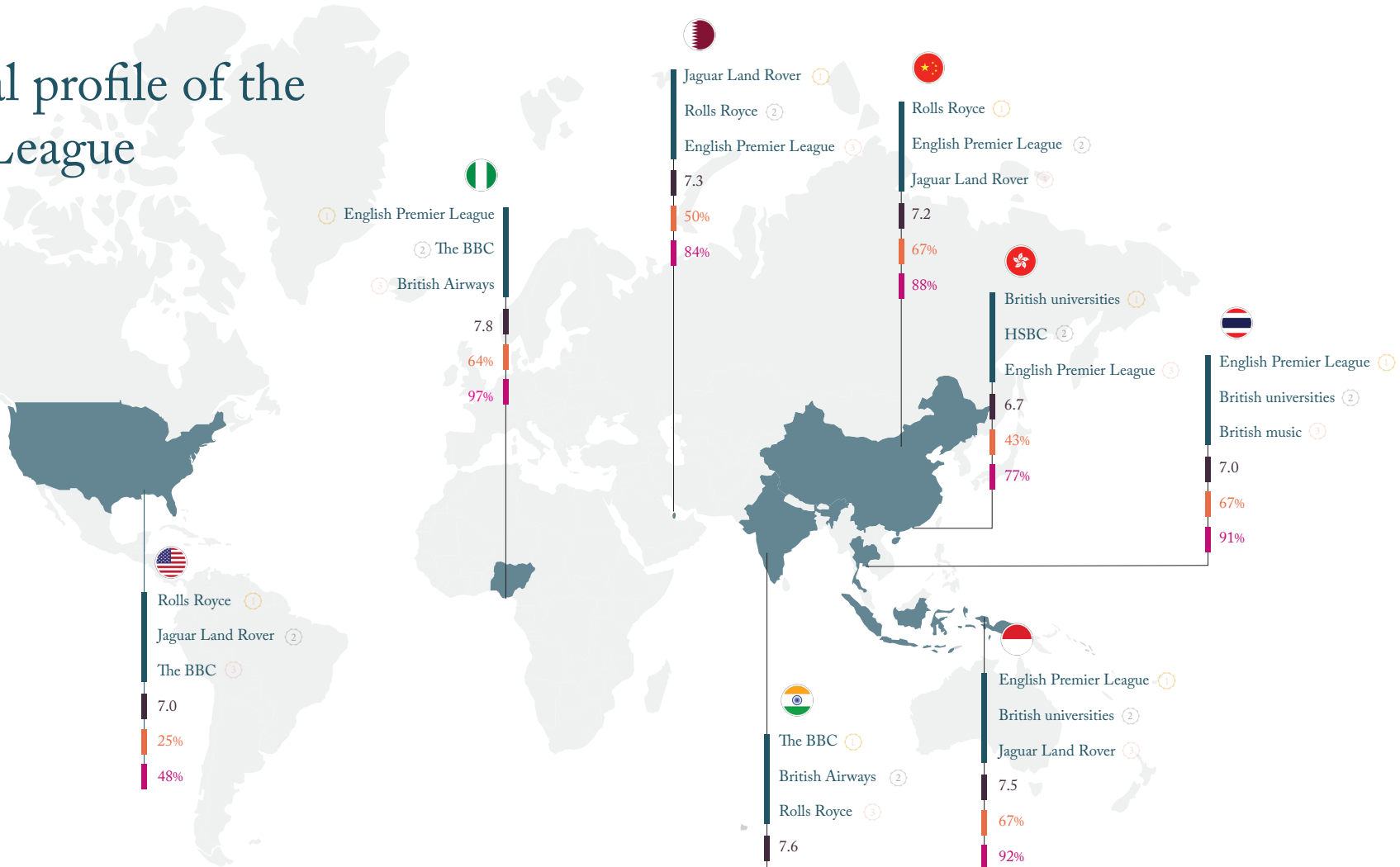
The rankings in the British Icon Index league table vary by market. In markets where Premier League football has a significant established presence – Qatar, Hong Kong, Thailand, Indonesia, and Nigeria – or there are fewer other cultural ties with the UK – China – the Premier League ranks first, second or third. In markets where the UK has longstanding cultural ties and other brands and institutions have significant purchase – India and the USA – the Premier League sits fifth and seventh respectively. Indeed in these markets, older brands and institutions like British Airways and the BBC have higher index scores.

Certain other types of icon also perform consistently well across the markets polled, usually those with global marketing budgets like Rolls Royce and Jaguar Land Rover, who are commonly in the upper reaches of the league table.

The global profile of the Premier League

KEY

- Top 3 British Icons
- Favourability towards the UK (mean score /10)
- % adults interested in the Premier League
- % say the Premier League makes them more +ve towards the UK



Multiple winners:
3 different winners in the past 3 seasons, making the Premier League unique among Europe's 20 leading football nations* [*defined by UEFA's co-efficient ratings].

Global stars:
107 nationalities* have been represented in the Premier League [*defined as players from FIFA Member Associations].

Full stadiums:
95.9% stadium occupancy in 2014/15 and 2013/14, the highest of any league in world football, creating the atmosphere that forms a key part of the appeal of Premier League football.

International appeal:
Premier League coverage is available in **730 million households** across 185 countries.

Football development:
950,000 young people have been positively impacted upon by the 6,000+ community coaches and referees trained by Premier League Club staff through the Premier Skills project, run in partnership with the British Council in 26 countries around the world.

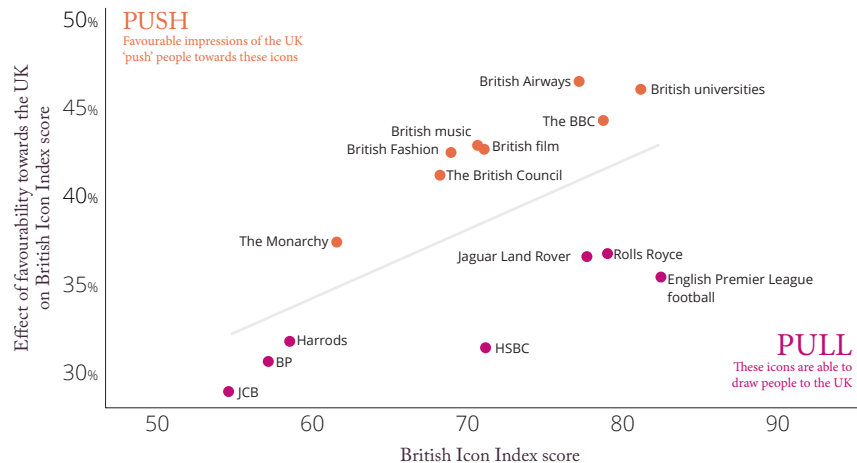
The Premier League's influence on attitudes towards the UK

The Premier League positively influences the vast majority of people's attitudes towards the UK: 84% of those polled across all the markets say that the Premier League makes them feel more positive towards the UK. Only British universities (88%) have a stronger impact.

Young affluent people are consistently more likely to be positively influenced by British icons: for 90% or more of young affluents across the markets polled, British universities, the Premier League and British Airways have a favourable impact on attitudes towards the UK.

The impact of the Premier League is especially strong in emerging nations where the Premier League has a significant presence: 97% in Nigeria and 92% in Indonesia. However, the Premier League's impact is consistent across all the markets: it is in the top five positively influential icons in every country except the USA.

The Premier League makes people more positive towards the UK, but you don't have to like the UK to like the Premier League: a favourable view of the Premier League is not dependent on warmth towards the UK. As a result, the Premier League is able to 'pull' people towards the UK.



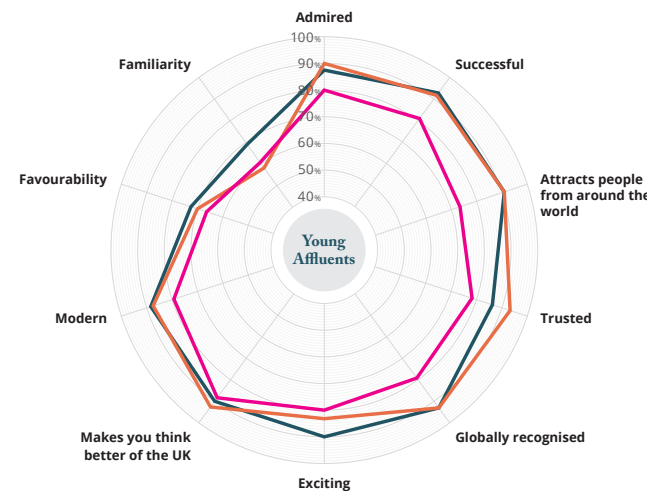
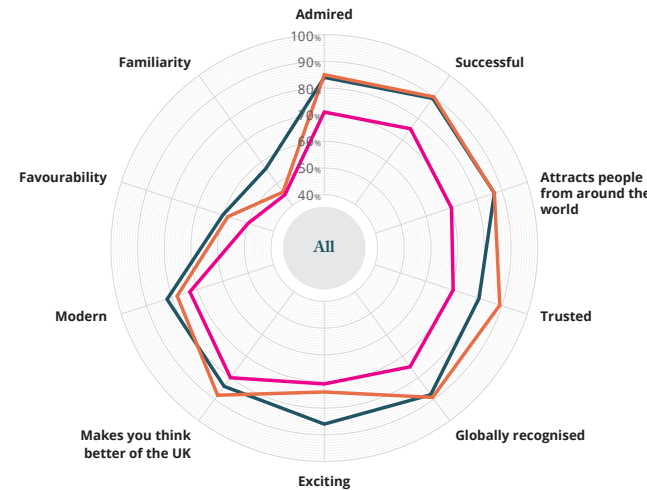
Icon profile

Comparing how the different icons perform on each of the measures used to create the British Icon Index reveals why the Premier League has the best score.

The Premier League performs consistently well across all the measures, thus giving it the strongest and most well rounded icon profile.

The global profile and popularity of the Premier League makes all the difference: people in these markets – and young, affluent people in particular – are more likely to know and like the Premier League than any other British icon.

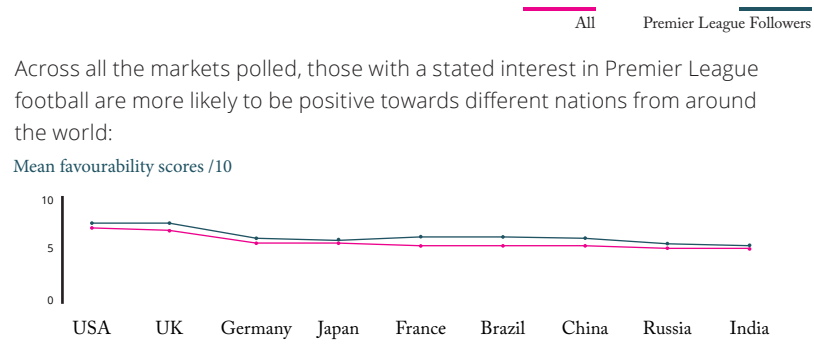
% across the countries polled associating quality with icon



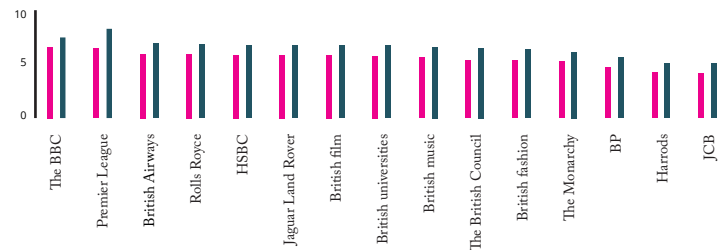
KEY

- English Premier League football
- British universities
- British film

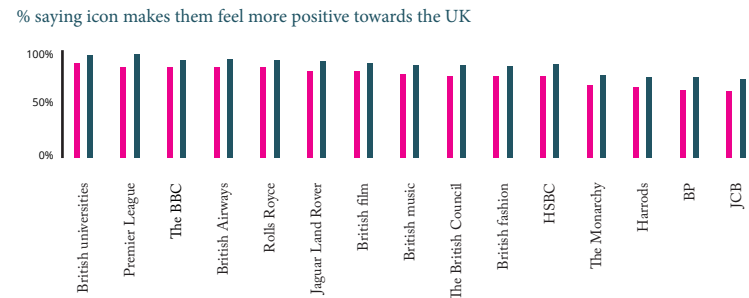
Premier League followers are more outward looking



Premier League followers are more likely to be familiar with all the British icons:
Mean familiarity scores /10



Premier League followers are more likely to have their views of the UK positively influenced by each icon:



Our Methodology

In order to create the British Icon Index we polled nationally representative samples of **over 500 adults** in each of the following markets: Qatar, Hong Kong, Thailand, India, Indonesia, the USA, China, and Nigeria; a total of **4,173 interviews**. The interviews were conducted online.

The markets surveyed were chosen for their varied population size, geographic location, and cultural and economic ties to the UK. What unites the markets is a strong existing or emerging middle class.

Participants were asked to rate each of 15 British institutions, brands and icons (The BBC, the Premier League, British Airways, Rolls Royce, HSBC, Jaguar Land Rover, British film, British universities, British music, The British Council, British fashion, The Monarchy, BP, Harrods, JCB) 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.

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

Where this report refers to 'Premier League followers', these are defined as those who, having expressed an interest in football, rated themselves 7-10 on a 0-10 'interest in the Premier League' scale.

About Populus

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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