

Measuring Our Cultural Dividends

*How does interest in UK culture impact
Chinese study decisions?*

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ABOUT EDUCATION FUTURES

Education futures is a series of in-depth research reports produced by the British Council, designed to provide insights into global education opportunities for UK institutions. These reports are intended to support decision-making, enabling the UK to better anticipate and respond to emerging opportunities in key markets.

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1. INTRODUCTION

Chinese students have told us in surveys and interviews that a country's culture is important when deciding where to study, but what exactly does this mean, and how does it affect the UK?

When prospective international students are asked where they want to study abroad and why, the culture of a study destination often appears towards the top of the list. For example, a survey conducted for Vision Overseas, a branch of language training company New Oriental and one of China's largest overseas study agencies, found that 40 per cent of students described the destination country's culture as one of their main decision factors when choosing where to study overseas¹.

However, 'culture' can mean many things in different contexts. For some students, this may be an interest in a country's history and traditional culture. Others may be more interested in music or sports from their preferred destination, while still other groups of students may be referring to the attitudes of local people and their preference for studious classmates or for a more laid-back lifestyle.

The British Council launched this research to address two closely related questions. First, which aspects of cultural interest are the most likely to drive interest in a country as an overseas study destination? And second, what do young people think of the UK as opposed to other major destination countries and regions?

¹ *White Book of China's Study Abroad 2015*, New Oriental Vision Overseas, 2015.

Research focused specifically on mainland China² due to the importance of its students to the UK's education sector. Nearly 98,000 mainland Chinese studied on higher education courses in the UK during the 2015/2016 academic year. New incoming students from China accounted for 39 per cent of all UK Tier-4 student visas issued globally in 2016, more than five times higher than the United States which is the next largest sending country³. In addition the number of Chinese students has grown substantially over the last five years, with a 46 per cent increase in visas issued to Chinese students since 2011 compared to an 18 per cent decline in non-Chinese students. Yet demographic shifts and improving HE quality at home will likely cause growth in China's international student mobility to slow in near future, with recruitment in the market subsequently becoming more competitive.

This report is intended to help our education institutions better understand the UK's cultural dividends and liabilities in China, equipping them to effectively communicate the quality and value of their offers in an increasingly crowded marketplace.

² Unless otherwise noted, 'China' and 'Chinese' in this report refer specifically to mainland China and should not be interpreted to include other regions such as Hong Kong, Macao or Taiwan.

³ Home Office, 2017. The figure refers to main applicants only, i.e. excluding visas issued to dependents.

The findings in this report were drawn from four main sources:

- Previously published research and studies of Chinese student opinion, including attitudes towards the UK and their impact on study choices.
- Analysis of nearly 9 million user-generated posts on the Sina Weibo social network, which is similar to Twitter.
- An online survey of 5,000 people, distributed through a mobile survey platform.
- Focus groups with Chinese students planning to study abroad and returned alumni.

The various stages of this research spanned several significant events in the UK, including the Brexit referendum, the subsequent weakening of the pound and the June 2017 election. While time will tell the extent to which these events will impact perceptions of the UK, sentiments towards foreign countries tend to change slowly, and the findings in this report may serve as useful background for the UK education sector's engagement in China well into the coming decade.

2. EXECUTIVE SUMMARY

- This report covers mainland Chinese perceptions of overseas cultures and education destinations based on a survey of 5,000 respondents, analysis of posts on the microblogging site Sina Weibo and focus groups conducted with prospective students.
- The majority (69 per cent) of our survey respondents said they are ‘interested’ or ‘very interested’ in overseas culture, with relatively stronger interest among first-tier city residents, current students, wealthy households and those in the 18-30 age range.
- Stark generational differences in foreign culture preferences emerged among our survey respondents, with older respondents tending to choose Western countries, while younger respondents showed greater affinity for neighbouring Asian countries like South Korea and Japan. This is part of a broader trend of integration among Asia’s developed economies.
- There is also a high degree of interest in overseas study. More than half of surveyed Chinese students said that they were at least considering overseas study, although only a small proportion of these eventually go abroad to study.
- There is a strong link between students’ interest in overseas culture and their desire to study overseas. Students who said they were ‘interested’ or ‘very interested’ in overseas culture were more than three times as likely to say that they were at least considering studying abroad, compared to those with less cultural interest.
- In addition, interest in the culture of specific overseas countries has a strong impact on students’ initial interest in particular overseas study destinations. Students who preferred a particular country’s culture were significantly more likely to also name that country as their preferred overseas study destination.
- Interest in particular aspects of overseas culture also has a strong effect on overseas study intentions. Students who are interested in overseas literature, history and traditional culture, or media (music, film and television) were more likely than average to name the UK as their preferred study destination. In contrast, students who were more interested in sports, brands/companies or technology had a higher chance of choosing the US.
- Overall, Chinese people have a high level of interest in UK culture and see it in a favourable light. The volume of posts related to UK culture on Chinese microblogging network Sina Weibo is second only to the US, and posts are more likely to be positive in tone. Among survey respondents, the UK was the third most likely to be rated among the top two countries in terms of culture.
- Attitudes towards UK education are overwhelmingly positive, as confirmed by sentiment analysis of social media posts. The volume of these posts was also substantially higher than posts about education in any other overseas country except the US.

-
- Chinese students' online discussions of overseas education tend to focus on rankings, fees, scholarships, subject choices, visa-related issues, and comparisons between different countries. Compared to other countries, discussion of UK education is more likely to be related to education quality or postgraduate study, and much less likely to be related to immigration.
 - Our research shows that the UK punches far above its weight in terms of initial interest for overseas study, only narrowly trailing the US in terms of social media buzz and study destination preference in our survey. But there is a clear mismatch between this initial level of interest and actual student flows, with Australia and Canada performing far better in reality than our indicators of perceptions would suggest.
 - This contrast between sentiments and actual mobility is likely due to several factors:
 - General awareness of UK study is high because of its historical reputation and a large investment in general marketing over the past decades. The UK's relatively greater marketing intensity may be generating interest among students who lack either the skills or financial means to follow through with foreign study.
 - Or specific barriers in the UK may be steering prospective students to other destinations. In particular, the UK has less appealing post-study work visa policies than its major competitors. Yet while the pathways to post-study work in the UK are currently narrower than the HE sector would like, it is possible that some ground can be regained by more clearly articulating the possibilities to prospective students.
 - While survey findings consistently identify university ranking and education quality as the most important decision-making factor for students, what respondents tell us often conflicts with their behaviour. Our analysis of 23,000 Chinese social media posts mentioning positive aspects of UK study indeed found that university rankings and reputations were discussed most, but the second most popular topic was romance, ahead of education quality, course structure and scholarships.
 - Among the UK's top five student recruitment markets, China stands out as the only one which is not a former colony. While China and the UK have had a significant level of exchange over the past 380 years, understanding of UK history and culture tends to be weaker in China than in the other major recruitment markets. This occasionally manifests itself in amusing anecdotes. Asked "When the UK is mentioned, what is the first thing you think of?", 95 of our respondents wrote in 'the Eiffel Tower'.
 - Our survey showed literature and history/tradition as the UK's strongest comparative cultural advantages. Universities have long recognised these as cultural dividends in their marketing campaigns, but a reliance on themes of tradition and history can be a liability if not balanced with a narrative of modernity, creativity and innovation; analysis of Weibo posts showed that the words most commonly used to describe people from the UK included 'conservative', 'boring', 'serious' and 'lazy'. Our survey respondents ranked 'innovation and technology' as the UK's second-most attractive cultural aspect by our survey respondents, but both the US and Germany were seen as comparatively stronger in these areas.

3. BROAD INTEREST IN OVERSEAS CULTURE

Chinese people from large cities and wealthier households were more likely to be interested in overseas culture, while those with an interest in literature, history and traditional culture were the most likely to prefer the UK in particular. The strongest associations with the UK included the royal family, London and overseas study.

According to the British Council's *As Others See Us* research, published in 2014, the two most important factors influencing Chinese young people's perception of an overseas country as attractive are both related directly to culture. The most important overall factor is the arts, such as music, theatre, literature, visual arts and film, which 59 per cent of over 1,000 surveyed Chinese 18-34 year olds said was important. Meanwhile a country's cultural and historic attractions were seen as important by almost as many, with 58 per cent of respondents selecting this attribute¹. A country's scenery and landscape, safety, and economy and business environment made up the remainder of the top five factors. However, Chinese people were less likely than the global average to say that history or language were important factors.

Our survey results in this report show a broad interest in overseas culture, with over a quarter of respondents describing themselves as 'very interested', while a further 43 per cent said that they were

'interested'. Fewer than 1 in 12 said that they were 'not very interested' or 'not at all interested' in overseas culture.

Yet interest in overseas culture also varied significantly depending on their individual characteristics. Factors influencing respondents' level of interest included age, student status, whether they lived in a major city, and income.

FACTORS INFLUENCING INTEREST IN OVERSEAS CULTURE

Age

Survey results showed that the level of interest in overseas culture was the highest among respondents aged 18 to 39. Interest was consistent across this age range, with the proportion of respondents describing themselves as 'interested' or 'very interested' in overseas culture varying from 70 to 74 per cent (see Figure 3.1).

The level of interest was much lower in older age groups, with a little over half of

¹ *As Others See Us*, British Council, 2014.

respondents in the 40+ and 50+ age ranges saying that they were interested in overseas culture. The number of ‘very interested’ people in these age groups was also significantly lower, standing below 20 per cent.

Somewhat surprisingly, the youngest respondents were also significantly less likely to describe themselves as interested in overseas culture compared to the 18+ age group. Fewer than 60 per cent described themselves as at least interested, while only one in five said that they were very interested.

Student status

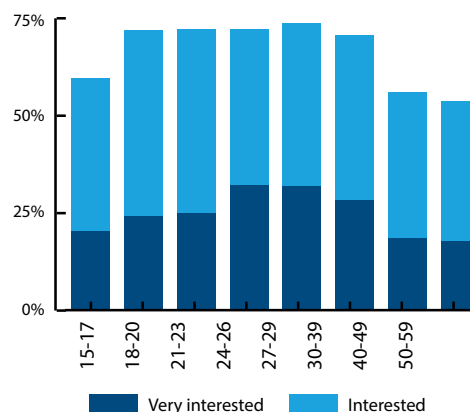
Current students were much more likely to describe themselves as interested in overseas culture than those of the same age who had already left education (see Figure 3.2). The gap between students and non-students widened with age, with older students more likely to say they were interested².

Geography

Our survey results showed that interest in foreign culture varied slightly by region, but city tier emerged as a much more important variable (see Figure 3.3). In China, cities are generally classified into tiers: Tier 1 cities are the country’s four most developed urban areas (Beijing, Shanghai, Guangdong and Shenzhen, all of which have populations of over 10 million and high average incomes); Tier 2 cities include most provincial capitals and other non-capital cities with a similar level of development, such as Suzhou or Xiamen; and Tier 3 and below relate to smaller cities and less-developed areas.

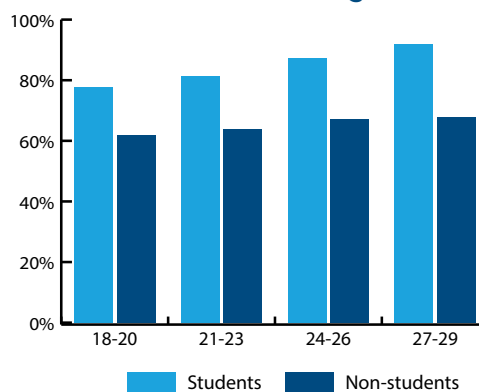
The more urban populations in coastal provinces also tended to be more interested

Fig. 3.1 Interest in overseas culture by age



Base: All respondents (4,896)

Fig. 3.2 Interest in overseas culture by student status and age



Base: All respondents aged 18-29 (3,155)

Fig. 3.3: Interest in overseas culture by city tier



Base: All respondents (4,896)

² Data is not given for respondents aged under 18 or 30+, due to low numbers of non-student and student respondents in these age groups respectively.)

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in overseas culture. However, these geographical differences were much smaller after accounting for city tier.

Analysis of online discussion of overseas countries also shows that this mainly took place in more developed parts of the country (see Figure 3.4). Guangdong, home to the megacities of Guangzhou and Shenzhen, was the province with the largest volume of users mentioning the UK or other major destinations, followed by Beijing and Shanghai. When looking at the number of users making relevant posts per resident, the top three provincial-level regions were Beijing, Shanghai and Tianjin – all wealthy directly-governed cities. Other provinces with a high volume of UK-related posts, whether measured in absolute terms or per head of population, were Zhejiang, Fujian and Jiangsu. Again, these are relatively wealthy and highly urbanised coastal provinces.

Wealth

Wealthier respondents clearly demonstrated more interest in overseas culture (see Figure 3.5). Almost 90 per cent of those who claimed their monthly household income was RMB 50,000 (£5,800) or above said that they were interested or very interested in overseas culture, while the proportion among those who said their family earned less than RMB 5,000 (£580) per month was only a little over half³.

Gender

When looking at the overall level of interest in overseas culture, there was very little difference between male and female respondents (See figure 3.6). Roughly 70 per cent of female respondents said that they were

³ Students being supported by their parents were asked to answer according to their parents' income rather than their own.

Fig. 3.4 Weibo posts discussing the UK or other key countries, by provincial-level administrative unit



Note: This map reflects the study area of this report - mainland China - but is NOT designed to reflect the extent of the People's Republic of China's political or territorial boundaries.

Base: Weibo users making posts mentioning the UK or other key countries or regions, March 2015 – February 2016 (~2.57 Mn users)

interested or very interested in overseas culture, compared to 68 per cent of males. Yet younger female respondents appear to be somewhat more interested in overseas culture than their male counterparts, while in the 30+ age groups men have a slightly higher level of interest than women.

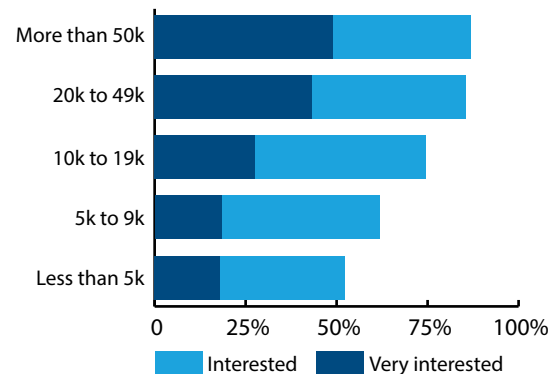
WHICH FOREIGN COUNTRIES HAVE THE MOST ATTRACTIVE CULTURES?

In order to gauge attitudes towards different countries, we asked survey respondents which two overseas countries they found the most attractive in terms of culture. Among respondents who said they were interested in overseas culture, the UK was the third most popular country overall – slightly behind France, but ahead of Japan and South Korea (see Figure 3.7).

Chinese internet users’ social media posts echo this greater interest in US culture. Analysis of posts on Sina Weibo – a microblogging site similar to Twitter – show that the US is the most-mentioned overseas country, with 3.7 million posts relating to the country over the 12-month period from March 2015 to February 2016. Over the same period, the UK was the second most discussed of the target countries, followed by Asian countries.

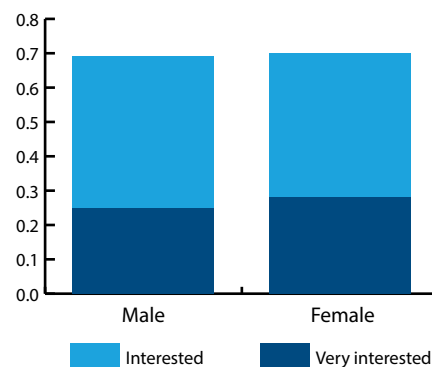
But Weibo buzz was of course a mix of positive and negative sentiments. Internet Word of Mouth (IWOM) analysis showed that the UK had the highest Net Sentiment Rate (NSR) of the target destinations and regions, with a 91 per cent positive rating; in comparison, the NSR for the US was only 76 per cent positive, while that of Asian countries was 66 per cent positive (see Figure 3.8). NSR is defined as the number of posts assessed as positive by a text analysis engine minus the number assessed as negative, divided by the total number of positive and negative posts.

Fig. 3.5 Interest in overseas culture by household income



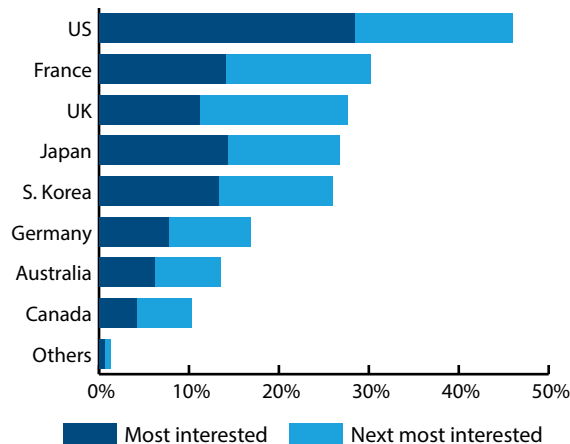
Base: Respondents who gave their monthly household income (4,651 respondents)

Fig. 3.6 Interest in overseas culture by gender



Base: All respondents (4,896 respondents)

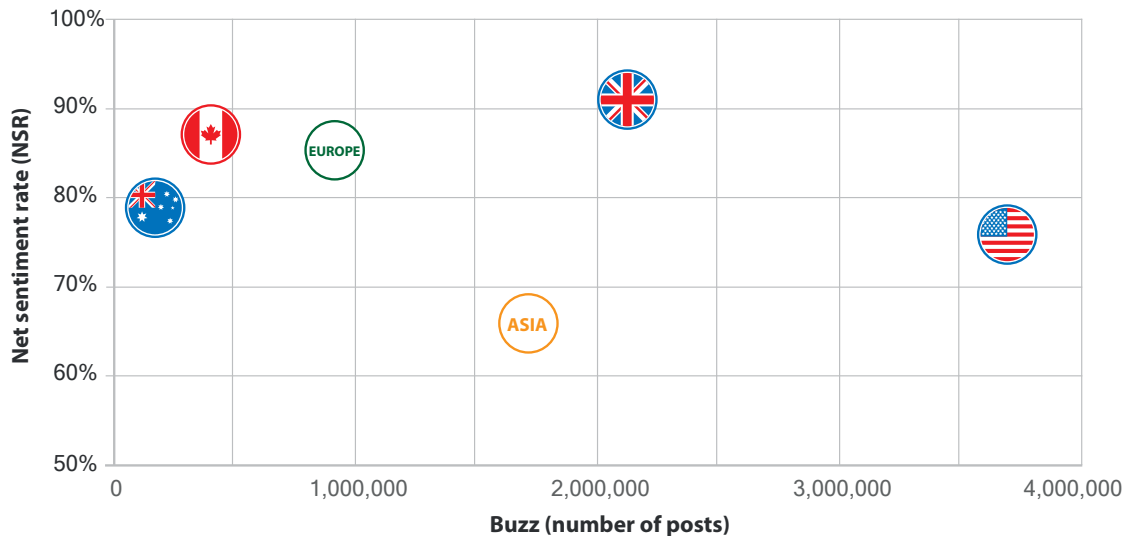
Fig. 3.7 Countries whose cultures respondents find most interesting



Base: All respondents interested or very interested in overseas culture (3,380)

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Fig. 3.8 Online buzz and sentiment regarding the UK and other key countries



Base: 8.9 million Weibo posts mentioning the UK or other target countries, March 2015-February 2016

$$\text{Net Sentiment Rating (NSR)} = \frac{\text{Positive} - \text{Negative}}{\text{Positive} + \text{Negative}}$$

Country preference by age

Survey responses showed clear generational differences in terms of the countries respondents found most attractive (see Figure 3.9). Older people were more drawn to French and German culture – for example, twice as many people in the 40+ age band chose France as one of their two favourites, compared to the youngest 15-17 age group. The opposite was true of nearby Asian countries, with both Korea and Japan much more popular among young people than their parents' generation.

In contrast to other countries, interest in UK culture was fairly consistent across age groups. This contributed to the UK ranking as the third most attractive country among students, in line with its position among the broader pool of survey respondents.

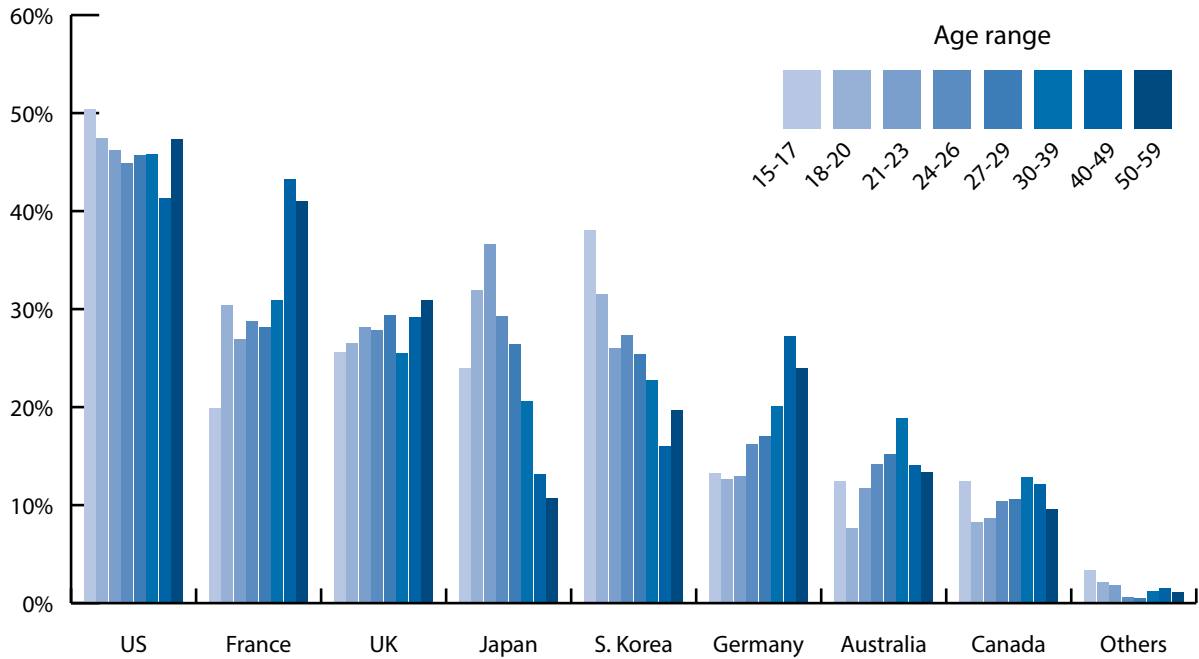
Country preference by gender

There were also clear gender differences. Male respondents were much more likely to say that the US was their most preferred overseas country in terms of culture, while female respondents were more than twice as likely to name South Korea (see Figure 3.10). The UK was somewhat more popular among female respondents than among males, but had the same overall ranking position among both genders.

Country preference by geography

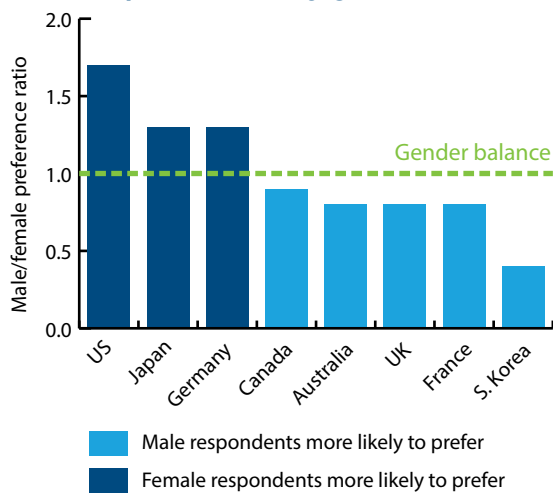
UK culture tends to be somewhat more popular in the more developed parts of China – 30 per cent of respondents from Tier 1 cities ranked the UK among their top two preferred countries in terms of culture, compared to only 25 per cent of those from smaller cities (see Figure 3.11). After accounting for city tier, the region of the country has little consistent effect.

Fig. 3.9 Cultural interest in countries by age range



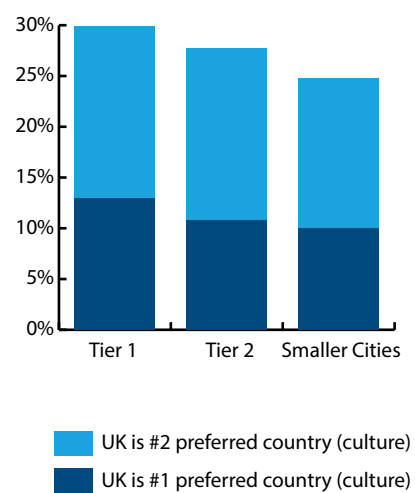
Base: All respondents who were interested or very interested in overseas culture (3,380)

Fig. 3.10 Respondents' cultural preferences by gender



Base: All respondents interested in overseas culture (3,380)

Fig. 3.11 Respondents preferring UK culture, by city tier



Base: All respondents interested in overseas culture (3,380)

WHICH CULTURAL ASPECTS MATTER MOST?

In addition to their overall level of interest, respondents were asked to choose the three aspects of overseas culture they found most interesting. Overall, slightly more than half of those respondents who were interested or very interested in overseas culture said that they were attracted to history and traditional culture, making it the most popular category (see Figure 3.12). Other popular aspects included media and technology, while sports and celebrities were each only chosen by around one in five respondents.

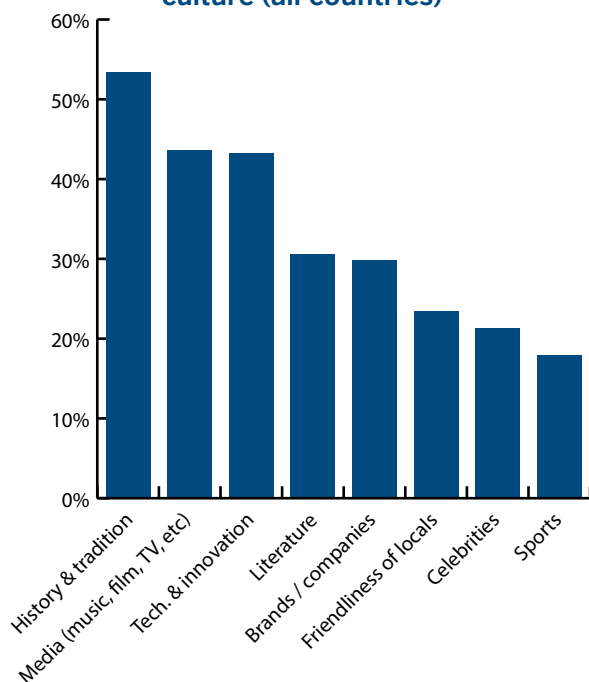
Age appeared to have relatively little impact on interest in most aspects of overseas culture. The only aspects that revealed significant generational differences were history/traditional culture

and brands/companies – both of which were more attractive to older respondents – and celebrities, which younger people found more interesting.

From a gender perspective, men were almost three times as likely to say they were interested in foreign sports teams, and around 50 per cent more likely to name technology and innovation. In contrast, women were more interested in the friendliness of local people and overseas celebrities.

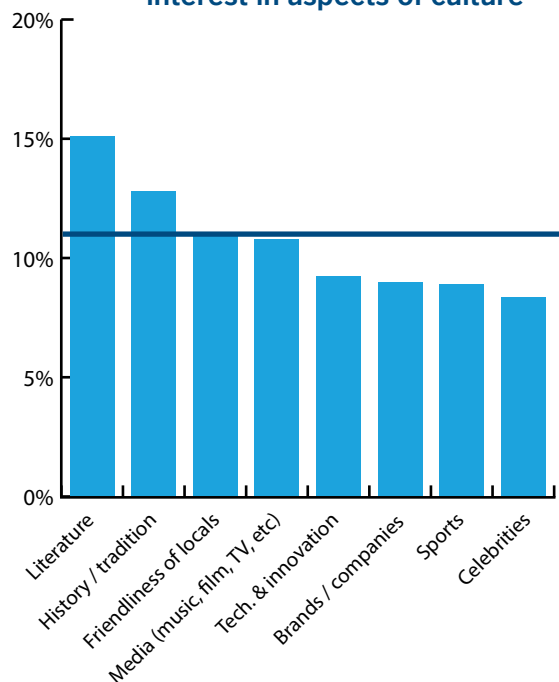
Findings from student focus groups followed similar themes. Interest in overseas countries’ media and literature were the most-mentioned topics, but history and traditional culture, as well as aspects such as architecture, were also often mentioned.

Fig. 3.12 Interest in aspects of overseas culture (all countries)



Base: All respondents who were interested or very interested in overseas culture (3,380 respondents)

Fig. 3.13 Preference for the UK by interest in aspects of culture



Base: All respondents who were interested or very interested in overseas culture (3,380 respondents)

Another culturally-related aspect which was not included in the survey but was often mentioned in discussions with potential students was the lifestyle in particular countries. The image of a more relaxed life overseas compared with China was a strong draw for some prospective international students, and this was closely linked to perceptions of national culture and people from overseas countries.

Impact on country preferences

Country preferences clearly depended on the aspects of overseas culture that people are interested in. For example, although South Korean culture was less than half as popular as US culture overall, the two countries were approximately equal when the responses are limited to people who named overseas celebrities among the three aspects of overseas culture that they found most interesting.

Looking at the UK in particular, people who said they were interested in overseas literature or in history or traditional culture were more likely than average to say that the UK was their most preferred overseas culture (see Figure 3.13). In contrast, the UK underperformed among people who were interested in celebrities, sports, brands and technology.

PERCEPTIONS OF THE UK

Detailed analysis of online social media posts also revealed distinct patterns of interest in discussions of the targeted countries. Keywords related to the UK centred around the royal family, football, tourism and local culture. Education-related keywords were also prominent in discussions, with ‘study abroad’ (留学) emerging as one of the most frequently associated terms and ‘university’ also ranking in the top 20 (see Figure 3.14).

In contrast, a greater proportion of posts mentioning the US were related to politics or world affairs, though overseas study still entered the top 10 related keywords. Immigration was also a much more popular topic for the US than the UK. Immigration and overseas study made up an even larger proportion of posts relating to Canada and Australia. Cultural topics made up a greater proportion of UK-related posts than they did for all foreign countries as a whole (29 per cent versus 17 per cent).

Meanwhile, almost one in six posts were related to education, roughly the same proportion as for the other target countries. In contrast, safety-related posts were much more common for other countries, particularly the US, than the UK; the tone of most of these posts was negative.

Posts discussing celebrities were the most common sub-category within UK popular culture, accounting for more than a quarter of all related posts. This classification includes individual members of the Royal Family, with Prince William being the most-referenced person; this was influenced by the period of the Weibo posts covered by the research including the birth of Princess Charlotte. Other celebrities mentioned in large numbers of Weibo posts included David Beckham, Tom Hiddleston and Benedict Cumberbatch. The most famous female UK celebrity in terms of Weibo mentions was Emma Watson. Other popular sub-topics related to UK culture were brands /companies and literature.

In comparison to the US, the UK had comparatively more posts related to literature and sport, as a proportion of total culture-related buzz, but a lower proportion of posts about media and brands (see Figure 3.15).

Meanwhile, when survey respondents were asked to name the first thing that they

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Fig. 3.14 Top Keywords on Weibo by country



Base: Weibo posts mentioning the UK, March 2015 – February 2016 (~2.1 Mn posts) posts mentioning the US, Australia or Canada, March 2015 – February 2016 (~3.7 Mn / ~0.4 Mn / ~0.2 Mn posts respectively)

associated with the UK, three responses stood out: London, Cambridge, and the Royal Family.

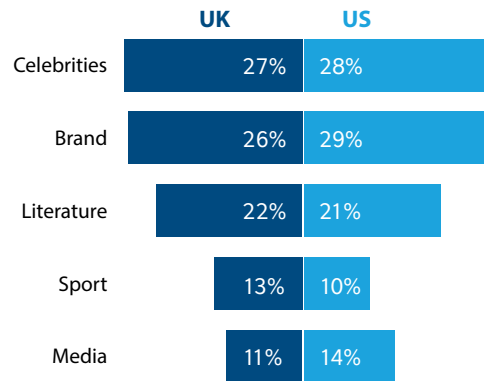
Big Ben, football and the English language were also popular answers, mentioned by at least 100 people; overall, the top six answers accounted for somewhat over half of all survey responses. More broadly, the most common associations were with locations/landmarks, traditional culture, and historical or fictional personalities such as Shakespeare and Sherlock Holmes. The responses also revealed some confusion regarding European geography, with around 2 per cent of survey respondents saying that the Eiffel Tower was the first thing that came to mind when the UK was mentioned (see Figure 3.16).

Our discussions with student focus groups showed that prospective students had similar images of the UK. When asked what they associated with the UK, the first answer was often related to landmarks or tourist attractions, the Royal Family, or the stereotype of the British gentleman.

Other commonly-mentioned topics included British literature (particularly Shakespeare, Sherlock Holmes and Harry Potter); historical topics such as the Industrial Revolution or, less positively, the Opium Wars; celebrities; and elite universities. The UK's climate was also mentioned by many students, who generally see this as a negative factor, although some see clean air as an advantage compared to the heavy pollution in many parts of China.

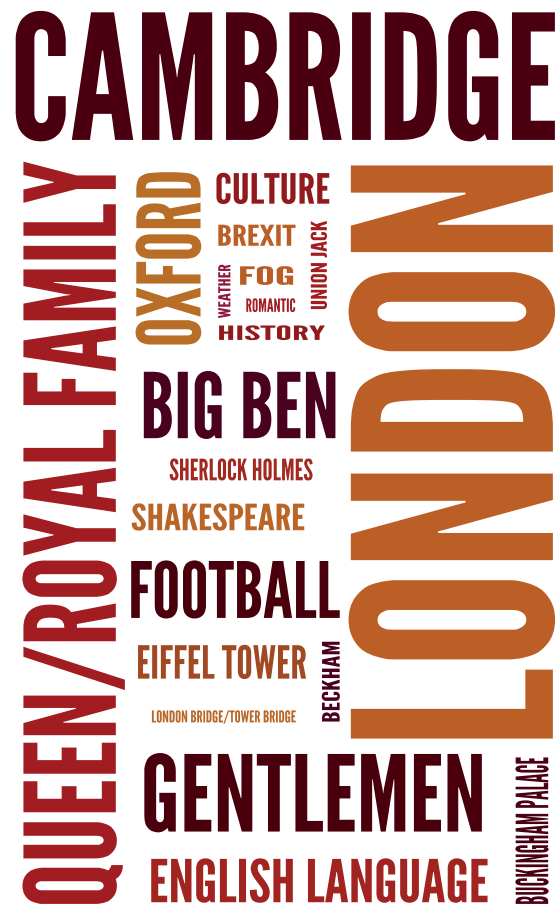
The UK's political situation was also mentioned by many students in focus groups. Some had positive opinions of the UK's stability, but the circumstances around Brexit caused uncertainty. Brexit itself was not necessarily looked upon negatively, but several students described the process as "a mess", while one

Figure 3.15 Breakdown of buzz related to UK and US popular culture



Base: Base: Weibo posts related to UK or US popular culture, March 2015 – February 2016 (~0.6 Mn / ~1.0 Mn posts respectively)

Figure 3.16 Keywords associated with UK culture according to survey respondents



Base: 3,002 respondents

commented that “they don’t know what they want to do”⁴.

Potential students’ thoughts about Brexit were mainly centred on how it would affect them personally. Some believed that it would make it harder for them to visit continental Europe while studying in the UK, or would hurt the UK’s economy, but others had a more positive view, saying that the drop in the pound would make it cheaper for them to live and study in the UK.

Students were also concerned about the UK’s student visa policy, which they saw as becoming more restrictive. Some of see these changes as implying that overseas students are less welcome in the UK or that senior government figures dislike Chinese students. While these negative sentiments cannot be ignored, it is worth noting that growth in Chinese student mobility to the UK has been relatively unaffected by previous policy changes over the past 10 years, including the introduction of the points-based system and the removal of the post-study work visa category.

Another negative view of the UK which was mentioned by several different groups of students was food. Although this may seem like a minor issue, almost all Chinese students considering the UK see it a factor, and it does affect opinions of studying in the country. One student commented that “my sister told me not to go to the UK because the food is bad”, although that student did eventually choose the UK as her preferred destination. Furthermore, this is not just an unfounded stereotype – discussions with returned alumni also showed that many students are unsatisfied with the cuisine (although some said that it was better than they had expected), and

4 It should be noted that these discussions took place in 2016, after the Brexit vote but before the most recent election.

their opinions help to influence the next generation of potential students.

In order to address this issue, some UK universities have invested in improving the quality of the Chinese food they serve in their canteens, and UK media reported on a fact-finding trip by the University Caterers Organisation in 2016⁵. Interviews with UK language schools providing summer school programmes show that some of these schools work with the agents representing them in China to ensure that the food they serve meets students’ requirements.

Survey respondents were also asked how the UK and other countries compared across the various aspects of overseas culture⁶. The UK was most attractive in the areas of history and traditional culture, with almost three quarters marking the UK was attractive or very attractive (see Figure 3.17). In comparison, only a little over half of respondents were attracted by UK sports or celebrities.

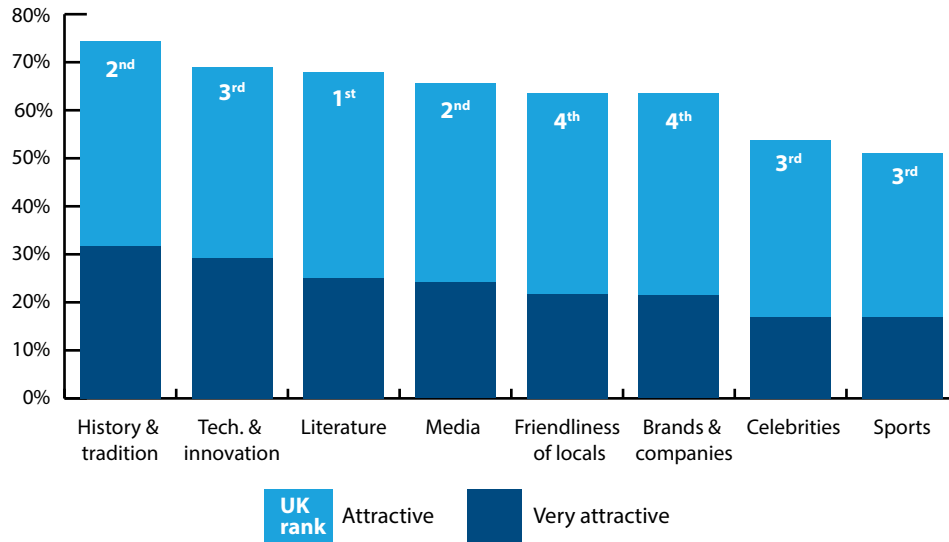
Comparing across all the target countries covered in our survey, the US tended to score the highest across most aspects of culture, while France had the highest proportion of these ratings for history/traditional culture and the perceived friendliness of local people. The UK meanwhile took the top rank in the area of literature.

The UK performed slightly better among those respondents who said they were interested in overseas culture, among whom the UK also took the top position for history/traditional culture, and was third rather than fourth in terms of brands.

5 “UK universities aim to win Chinese hearts through their stomachs”, Times Higher Education, 2016.

6 All respondents were asked for their perceptions of the UK and for one other randomly-selected country.

Figure 3.17 Attractiveness of UK culture and rank compared to other target countries



Base: All respondents (4,896 respondents)

In contrast to people from other countries, the British Council’s 2014 *As Others See Us* research showed that Chinese people have a more positive view of many aspects of UK culture than the global average. According to that report, 86 per cent of Chinese people agreed that the UK had “world leading arts and cultural institutions and attractions”, more than the proportion in any of the other four countries where surveys were carried out (Brazil, Germany, India and the US). Chinese people were also more likely than the global average to say that the UK had “innovative and creative arts” or “world-leading sports teams and events”.

The UK’s national strengths

Fashion was the most-cited strength of the UK, making up more than a quarter of posts classed by the text analysis engine as related to UK national strengths. This was also the most mentioned strength across all analysed countries. However, education was the second most-cited strength, attracting a substantially larger proportion of these

posts for the UK than for other countries.

The fifth-most mentioned national strength of the UK was literature, covering anything from Shakespeare to Harry Potter. In comparison, Weibo users talking about other countries such as the US or Japan were more likely to describe their affection for those countries’ music.

In this case, the social media buzz was quite different to Chinese people’s responses when directly asked what they saw as the UK’s main strengths – Figure 3.18 reflects what people talk about online regarding the UK. There was a great amount of diversity in survey answers here, with even the most popular group of answers – those related to science or technology – making up only around 12 per cent of the total⁷. Advantages related to education were the second most commonly mentioned, followed by broad references to UK culture (see Figure 3.18).

⁷ Examples of responses in this category include ‘science’, ‘technology’, ‘technological innovation’ and ‘scientific research’.

In focus groups with potential students, we asked about their opinions on the UK’s advantages and disadvantages. Positive impressions of the UK’s history and traditional culture stood out as the most commonly mentioned advantage, while students were also positive about the quality of UK education and, in many cases, the country’s environment. Other less commonly mentioned advantages included the English language, UK design and architecture, literature, and the UK as a hub of international (Western) culture.

Meanwhile, the UK’s weather and food were the most-mentioned disadvantages. There is also an entrenched perception of the UK (and especially London) as being polluted which has persisted in China for many decades and was mentioned by some students, although others were aware that this is no longer true.

The UK was also seen as expensive – although this was seen as less true now than in the past, due to the decline in the pound since the Brexit vote. On the other hand, the UK is increasingly seen as unwelcoming to foreigners, and especially to overseas students.

There was a widespread perception of the UK as a more relaxed place to live than China, although to a lesser extent than some other overseas countries, particularly Australia. Some students saw this as a positive aspect of UK culture, but others were more apt to describe it as laziness.

Perceptions of UK people

Weibo posts that mentioned people from the various target countries were also analysed. Many of the words most closely associated with people from the UK reflected the perception of a very traditional environment – the most closely related word was ‘conservative’, followed by ‘exclusive’, while UK people are also seen as ‘serious’ or even ‘boring’. Some posts also described British people as ‘lazy’, and netizens also noted their ‘dark humour’ (see Figure 3.19).

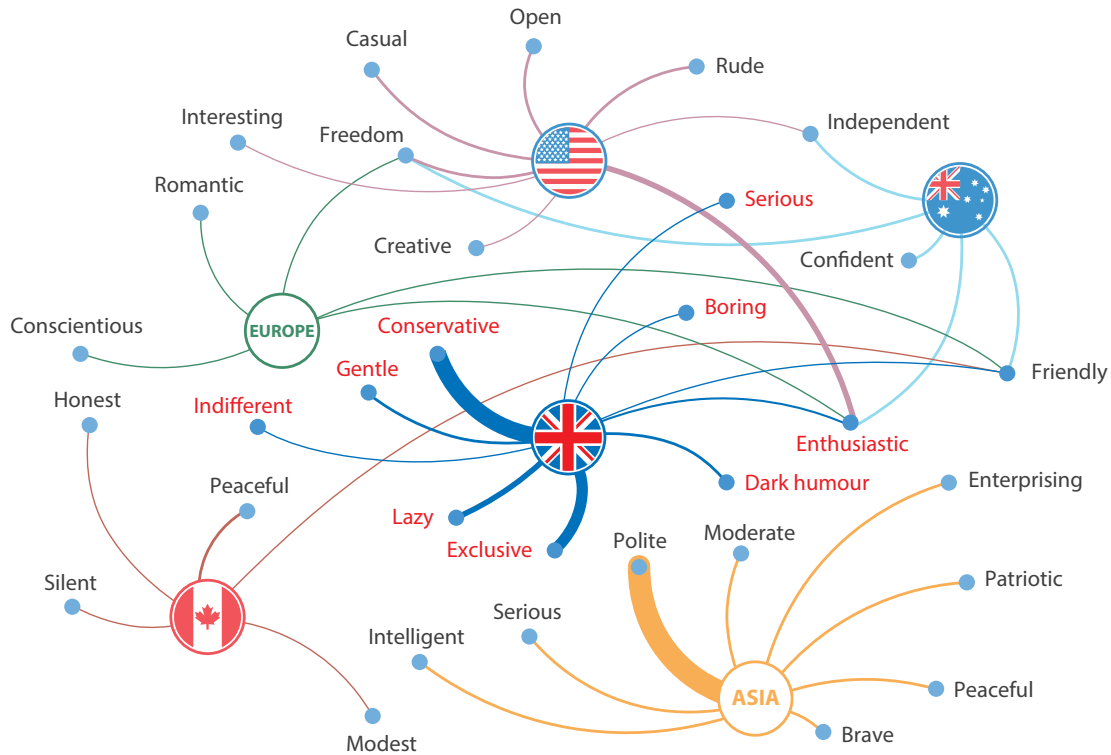
In comparison, Americans were seen as enthusiastic, with descriptions related to freedom also very common; one negative perception is that they are seen as rude. Australians are seen as friendly and enthusiastic, while Canadians were described as peaceful and modest. The

Figure 3.18 Perceptions of UK’s greatest strengths



Base: All respondents except those answering “don’t know” (4,832 respondents)

Figure 3.19 Words used on Weibo to describe people from the UK and other key countries



Base: Weibo posts describing people from the UK or other key countries or regions, March 2015 – February 2016 (~170,000 posts)

overwhelming perception of people from other Asian countries was that they are polite.

Although these perceptions of British people could be seen as fairly unflattering, the impression of a traditional and serious environment is not necessarily negative when it comes to attracting students to the UK's schools and universities.

Discussions with potential students give a similar impression, with the image of the serious and cultured but also somewhat aloof 'British gentleman' playing an important role in many students' perceptions.

Perceptions of safety in the UK and other overseas countries

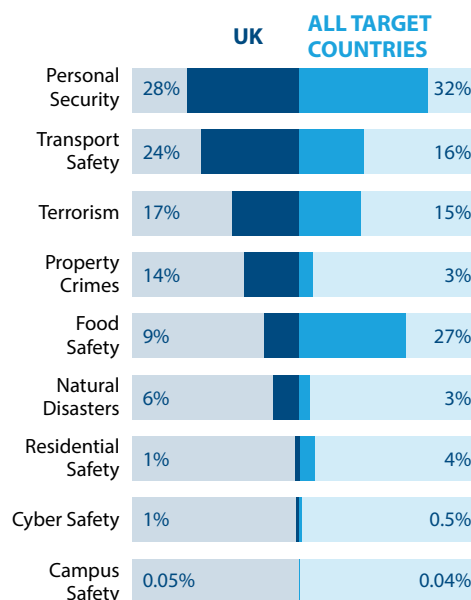
As discussed earlier, safety is one of the key issues discussed when Chinese people talk online about life overseas. Surveys also show that it is one of the key issues taken into consideration when students consider where to study, and a key advantage of the UK in comparison to the United States. Only 0.3 per cent of Weibo posts about the UK are tagged as discussing safety, while the proportion for the target countries as a whole is three times as high.

Looking more closely at Chinese people's perceptions of safety, the largest proportion of posts tagged as referring to this issue

discussed personal safety issues such as violent crime (see Figure 3.20). However, in the UK context, almost as many posts discussed transport safety such as traffic accidents. These two issues made up a little over half of all posts about safety in the UK, followed by terrorism which was discussed in around a sixth of these posts. Both in the UK or in other overseas countries, well under 0.1 per cent of safety-related posts specifically mentioned safety on campus.

One distinct difference between the UK and overseas countries as a whole, as shown in the chart below, is in terms of food safety. However, the large number of posts in this category is mainly due to the context of imports of genetically modified food from the US to China. As a result, unlike most aspects of safety, these posts are relatively less related to Chinese students' concerns about life in the US itself, and the chart should not be interpreted to mean that the UK has a major advantage over the US in this area.

Fig. 3.20 Breakdown of Weibo buzz related to safety concerns



Base: Weibo posts discussing safety concerns in the UK or other key countries or regions, March 2015 – February 2016 (~43,000 posts)

4. INTEREST IN OVERSEAS EDUCATION

Interest in overseas education is concentrated in larger cities and students from richer families, with the UK seen as the second most attractive destination overall and strongly associated with elite universities. Postgraduates and female students were the most likely to find the UK attractive, but negative factors included high costs and concerns over visa policy.

Overall, more than half of all surveyed Chinese students said that they were considering studying abroad, with the ‘definitely want to study overseas’ group accounting for 12 per cent of all student respondents.

It should be noted that this is substantially higher than the proportion of Chinese students who eventually go abroad to study. According to China’s National Bureau of Statistics, around 545,000 Chinese students went abroad to study in 2016. This was equivalent to around 7 per cent of graduates from academic senior high schools that year, or around 3 per cent of the same age cohort that started primary school¹. The difference between initial interest and actual mobility is likely due to practical considerations such as cost and admissions requirements.

FACTORS AFFECTING ATTITUDES TOWARDS OVERSEAS EDUCATION

Among the survey pool, notable patterns emerged based on city tier and income

levels. Students in larger cities were the most likely to say they were interested in overseas study (see Figure 4.1). Two thirds of students in Tier 1 cities – Beijing, Shanghai, Guangzhou and Shenzhen – said that they definitely want to study overseas or were at least considering it. In comparison, well under half of students from less-developed areas said they were considering going abroad.

Although students from larger cities also tended to be more interested in overseas culture, the impact on attitudes towards study abroad was much stronger. One major factor affecting this is household income, with students from wealthier families being significantly more likely to say they were considering studying abroad. Among students who said that their household incomes were at least RMB 20,000 (£2,300) per month, around a quarter said they definitely wanted to study overseas and almost five in six were at least considering it (see Figure 4.2). In comparison, less than a third of students in households earning less than RMB 5,000 (£600) per month were even considering going abroad to study.

Again, it should be remembered that the survey measured students’ attitudes regarding overseas study, which might not

¹ Although international students leave China at different stages of their academic career, a single year-group of students has been used for comparison as the outbound figure also refers to those going abroad in a single year.

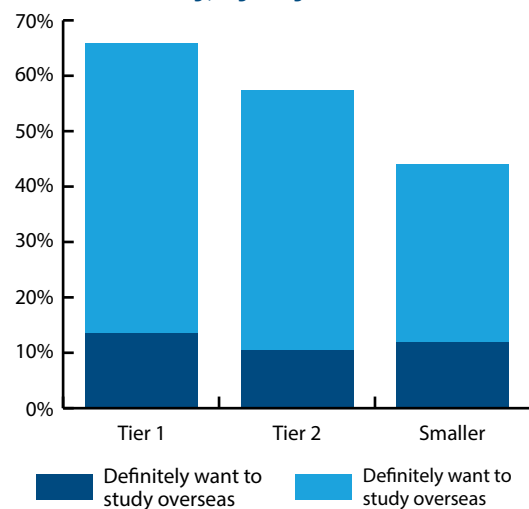
translate into actual study abroad. The proportion of students from low-income households that will actually go abroad to study is likely well below the 29 per cent shown in the chart above, or even the 5 per cent who said they ‘definitely want to’ study overseas. Nevertheless, these survey results do give an indication of students’ initial attitudes towards overseas study.

Comparing responses for income and city tier, students in Tier 1 cities are only slightly more likely to say they want to study overseas than those in Tier 2 cities at the same income level. However, there is a substantial difference between these city tiers and students from smaller cities, particularly in the middle income bands. Among students who reported household income between RMB 10,000 – 19,999 (£1,200 to £2,300) per month, there was a gap of more than 10 percentage points between those in Tier 1 and 2 cities and those from less developed areas.

Social media chatter showed similar city-tier patterns to our survey group, though with more pronounced differences between provinces (see Figure 4.3). As with interest in overseas countries in general, Weibo users who made posts related to overseas education were much more likely to be located in more developed parts of the country. More of these posters were in Beijing than any other provincial-level region, despite the municipality having a lower population than most provinces. This is likely because Beijing is both one of the most developed parts of China and has a large number of elite universities, attracting top students from across China. Other regions with a large number of people posting on this topic compared to their population included other directly-governed cities such as Shanghai and Tianjin and wealthy coastal provinces including Guangdong, Zhejiang, Fujian and Jiangsu.

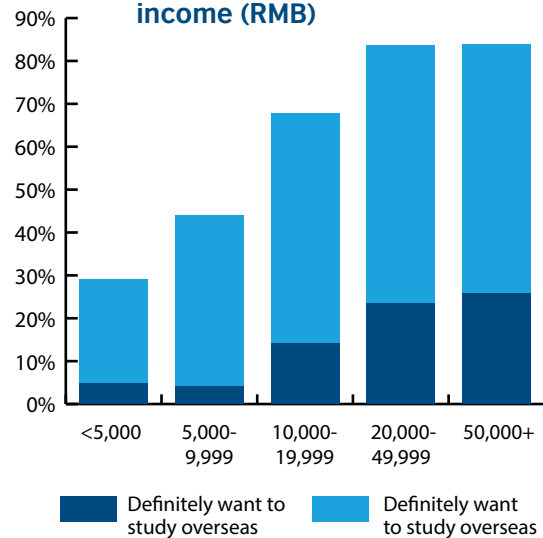
Despite overseas users only making up a very small proportion of Weibo’s userbase, these users also made up a large share of discussion related to international education. Posters outside mainland China accounted for more than 11 per cent of all users who made posts tagged as related to education in the UK or one of the other target countries.

Fig. 4.1 Students’ interest in overseas study, by city tier



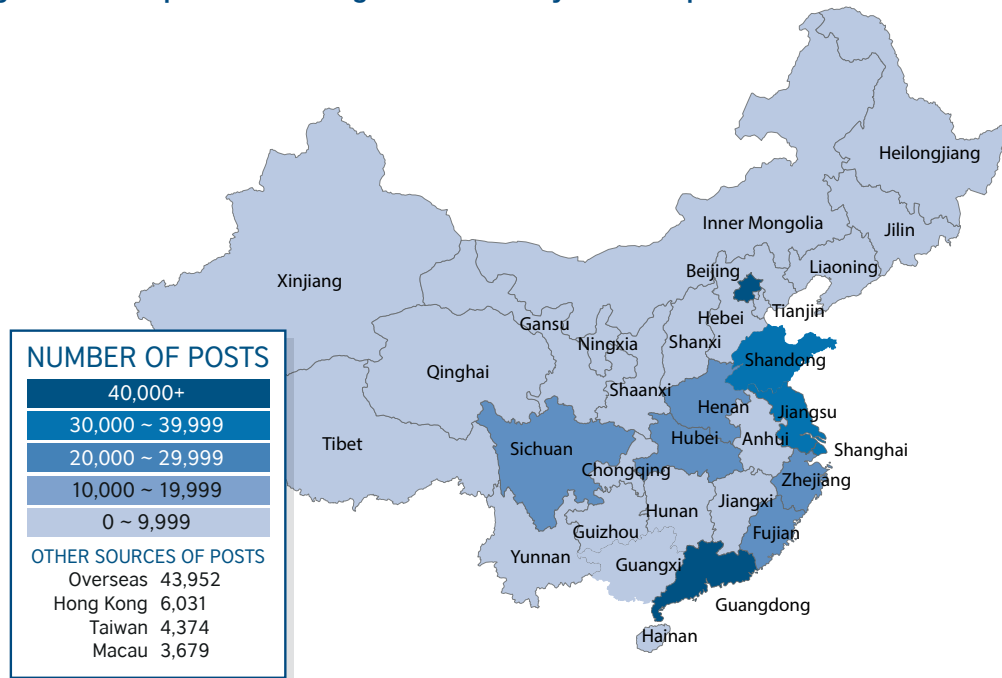
Base: All current students (1,633)

Fig. 4.2 Students’ interest in overseas study, by monthly household income (RMB)



Base: All student respondents who answered regarding household income (1,509)

Fig. 4.3 Weibo posts mentioning UK education by mainland province



Note: This map reflects the study area of this report - mainland China - but is NOT designed to reflect the extent of the People's Republic of China's political or territorial boundaries.

Base: Weibo users making posts mentioning education in the UK or other key countries or regions, March 2015 – February 2016 (~512,000 users)

In comparison to those users discussing the target overseas countries more generally, posters in Beijing were much more likely to discuss foreign study, as were users located overseas. The same was true to a lesser extent in other major cities like Shanghai, as well as in Heilongjiang (which hosts a large number of transnational education programmes), Shaanxi (where Xi'an is a major student hub for West China) and Hubei (which contains Wuhan, the city with the largest number of HE students in China and indeed the world). The ratio of discussion of overseas education compared to overseas countries in general was the lowest in China's least-developed western regions such as Tibet, Ningxia and Qinghai.

INTEREST IN SPECIFIC OVERSEAS STUDY DESTINATIONS

The US was by far the most popular study destination in the survey. Among students who said that they definitely wanted to study

abroad or that they were considering it, 30 per cent chose the US as their first-choice destination while almost half rated it as either their first or second choice (see Figure 4.4).

The UK also performed very well, with significantly more students naming the country as their first-choice destination compared to third-placed Japan, while more students named the UK as their second-choice destination than any other country.

Australia, Germany and Canada performed relatively better in terms of interest in studying in these countries as opposed to the number of Chinese people interested in their respective culture. However, South Korea saw the opposite trend, with few people interested in studying there even though its culture was seen as attractive. France and Japan also performed relatively weakly in terms of study interest as opposed to cultural interest.

As a second-choice destination, the UK attracted a large number of students who had marked the US as their top choice. The opposite was also true, with students who preferred the UK far more likely to name the US as their second choice than any other country.

Australia and Canada were also very likely to appear in combination – students who picked Canada as their first choice were much more likely to pick Australia as their second choice and vice versa. However, there was relatively little overlap between Japan and Korea; students choosing either of these countries as their first-choice destination generally chose the US as their second option.

The large majority of surveyed students who said they wanted to study abroad were interested in studies at the bachelor's degree and/or postgraduate level, with postgraduates making up the majority, as most surveyed students were aged 18 or over.

Comparing students who wanted to study at these two levels, the UK was noticeably more popular at the postgraduate level. Almost 40 per cent of students who were interested in postgraduate studies listed the UK as their first or second choice, while the proportion at the undergraduate level was below 30 per cent.

The same was true of the US, though to a lesser degree. On the other hand, Japan and Korea performed better among students who wanted to study an undergraduate degree abroad.

There were also significant gender differences in preference for some countries (see Figure 4.6). In particular, male students were substantially more likely to name the US, Japan or Germany as their top preferred destination, while female students were more likely to say that they wanted to go to Canada or South

Korea. Interest in the UK also skewed slightly female, similar to actual Chinese enrolments in the UK, which stood at 60 per cent female in 2015/2016².

A key finding – or non-finding – from the survey was that preference for most countries did not appear to depend greatly on household income at this stage, although the relatively small sample size for most pairs of income levels / destinations means that most results here were not statistically significant. The main exception was for South Korea, which students from less wealthy households were much more likely to prefer. Similarly, there is no significant variation by city tier, again with the exception of South Korea which is a much more popular choice among students from smaller cities.

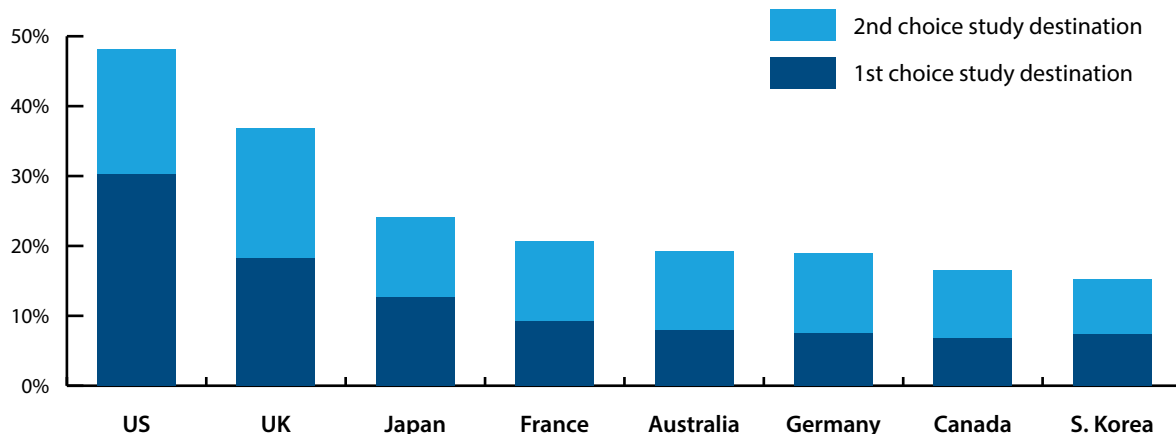
As discussed above, it should be noted that more than half of all students said that they were considering overseas study, which is much higher than the proportion who will really go on to study abroad. As a result, the study preferences described in this section mainly reflect general perceptions, while students' final decisions could well be different after they research study destinations in detail. Nevertheless, these findings show that students tend to consider the attractiveness of a destination first rather than being constrained by finances at the initial stage.

Comparing parents' preferences to those of students, there were some significant differences. In particular, parents were far less likely to want their children to study in Japan or Korea – students were more than three times as likely to list either of these countries as study destinations compared to parents who wanted their children to study overseas.

In contrast, parents were more likely to choose the traditional English-speaking

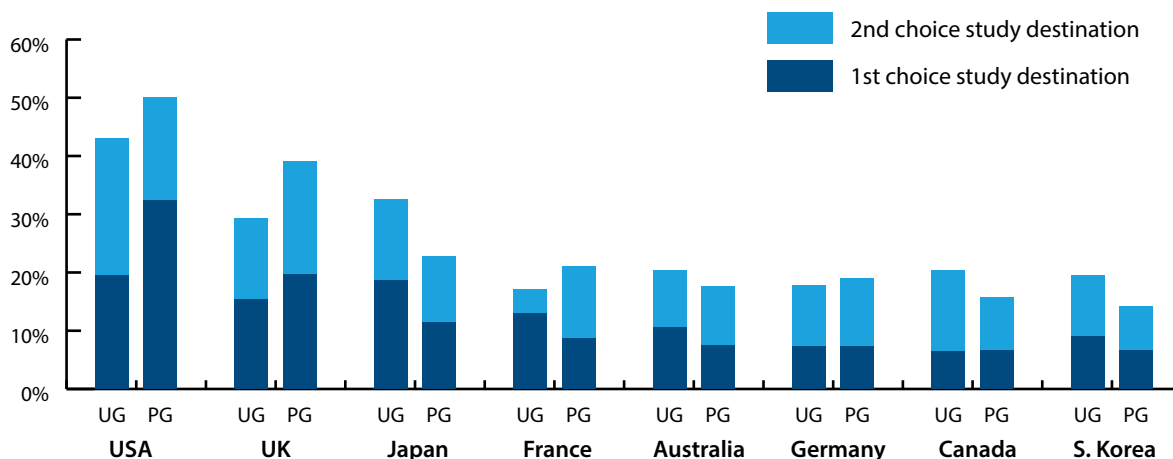
² UK Higher Education Statistics Agency.

Fig. 4.4 Students' preferred study destinations



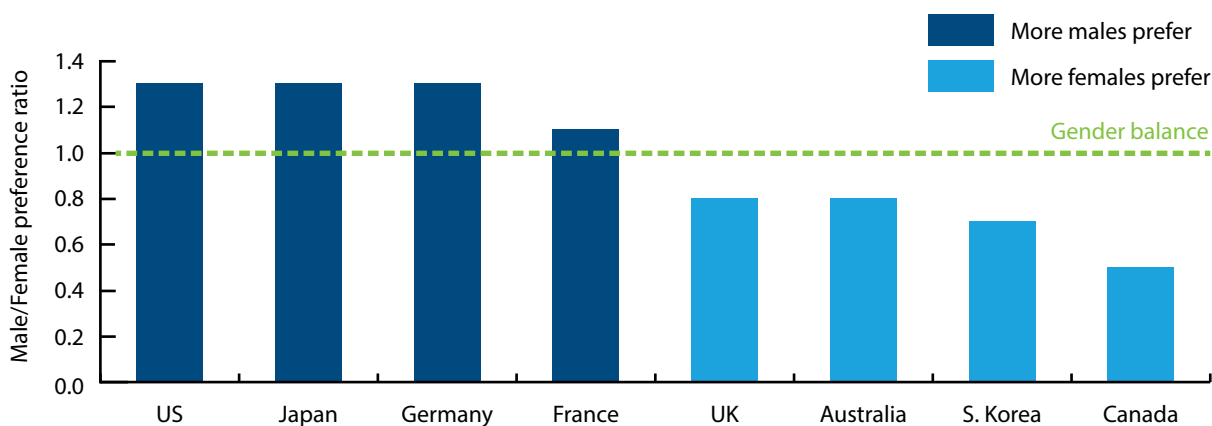
Base: Students who said they definitely wanted to study abroad or were considering it (918 respondents)

Fig. 4.5 Students' preferred study destinations, by level of study



Base: Students who said they definitely wanted to study abroad or were considering it (918 respondents)

Fig. 4.6 Students' preferred study destinations, by gender



Base: Students who said they definitely wanted to study abroad or were considering it (918 respondents)

destinations, with the UK, USA and Australia all doing much better among the parent group than among the students themselves. Parents' preferences for study destination did not vary according to level of study as much as student preferences did.

One important factor influencing the awareness of UK education and positive sentiments towards the UK's universities is the more active role the UK takes in promoting its overseas education offer. In the 2016-17 financial year, the British Council invested over £253 million globally in activities classed as "encouraging educational co-operation and promoting the advancement of education"³.

This is significantly higher than the expenditure of other major international competitors. The US federal budget for international academic programmes was cut by more than half to around \$149 million (£114 million) for the 2018 financial year; the large majority of this budget (\$126 million; £96 million) is allocated to the Fulbright scholarship scheme⁴.

Australia's budget has allocated a total of AU\$12 million (£7.3 million GBP) over four years towards implementing the country's National Strategy for International Education⁵, in addition to "over \$200 million" (£122 million) annually in inbound and outbound scholarship funding⁶. Recent data is not available for Canada, but in 2013 the country's federal government committed CA\$23 million (£14 million) over two years to support Canada's international education strategy, including CA\$5 million per year for international education marketing activities⁷.

3 *British Council Annual Report 2016-17*, British Council, 2017.

4 *Congressional Budget Justification*, Department of State, Foreign Operations, and Related Programs, Fiscal Year 2018, US Department of State, 2017.

5 *Budget 2016-17*, Government of Australia, 2016.

6 *Scholarships to study in Australia*, Australian government (studyinaustralia.gov.au), 2017.

7 *Budget 2013*, Government of Canada, 2013.

As the largest sending nation for international students globally, China accounts for a significant share of spending on education marketing. The UK's comparatively higher investment in this type of promotion helps to raise awareness of the quality of UK education among Chinese students, supporting the recruitment activities of UK universities, schools, colleges and language centres.

ONLINE DISCUSSION OF UK AND OTHER OVERSEAS STUDY DESTINATIONS

As mentioned above, discussion of education makes up a significant portion of online discussion about the UK, much more so than in the other countries covered in this research. Of the target countries and regions, Weibo discussion of UK education was a relatively close second to the US in terms of volume, and the overall net sentiment rate was the most positive of all the key destinations with a 93 per cent positive rate (see Figure 4.7).

Again, Chinese internet users' opinions of education in Asian countries were more likely to be negative than the other major overseas destinations, with many posts criticising exam-oriented education systems that failed to teach critical thinking. The lower sentiment ratio for the US compared with the UK was largely due to posts criticising 'diploma mills'.

Across all countries, common keywords within education (highlighted in green in Figure 4.8) relate to university rankings, visas, subject choices, application procedures, and scholarships. Another common theme was comparisons, both between different destinations and with China. For example, a large proportion of posts mentioning UK education also reference the US or Australia, and vice versa. This shows that it is common for students to weigh different countries

against each other and discuss their relative advantages.

A key difference between the UK and the other target countries is discussion of immigration. This was one of the top keywords linked to education in all other destinations, but was mentioned much less often for the UK. This is likely linked to the UK’s visa policy, which makes it difficult for students to stay in the UK after graduation and therefore means that the UK is less attractive to students who see this as an important aspect of overseas education.

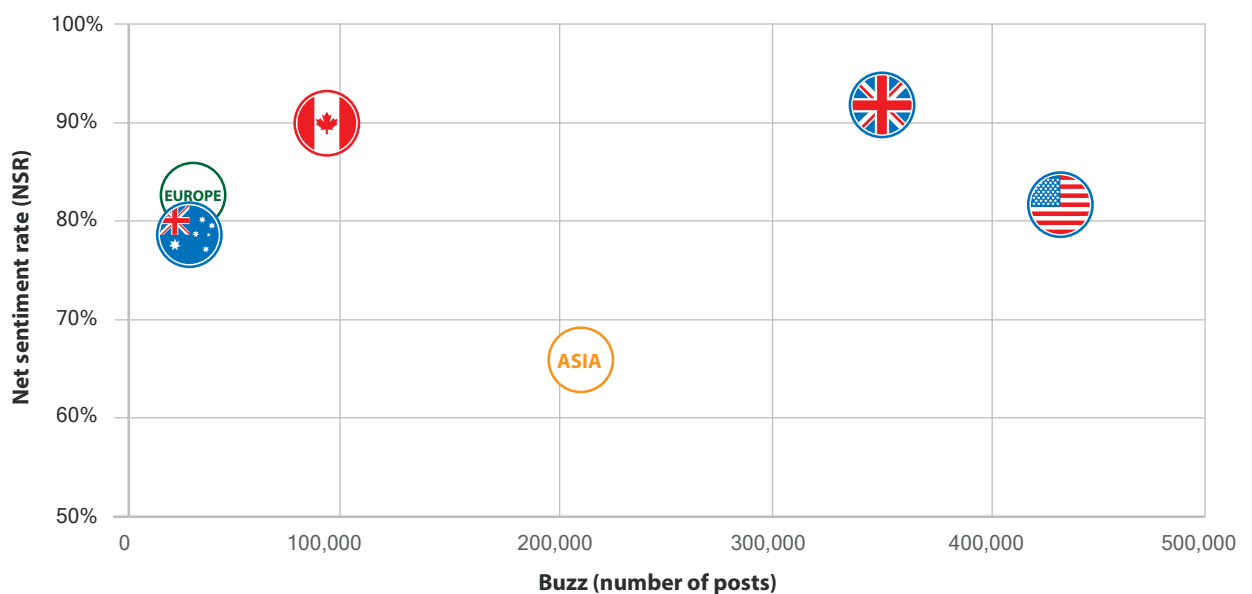
Another difference between the UK and other destinations was that master’s degrees made up a significantly larger share of posts on UK education. This is likely due to the larger share of master’s degree candidates among Chinese students in the UK in comparison to other major destination countries.

These results were somewhat different to the answers that came to mind when our survey respondents were directly asked what they associated with UK education (see Figure 4.9). For more than a third of survey respondents, the first response was either Cambridge or Oxford, making these by far the most common associations.

Other common answers were the English language, freedom or openness, and the perception of high quality or elite universities. In general, Chinese people’s top-of-mind perceptions of UK education seem to be very positive.

However, some other answers also reflected a relative lack of familiarity with UK education among the general surveyed population. Around 8 per cent of respondents – and even 3 per cent of students who said they were at least considering studying overseas – did not name anything they thought was associated

Fig. 4.7 Online buzz and sentiment regarding education in the UK and other key countries



Base: 1.1 million Weibo posts mentioning education in the UK or other target countries, March 2015-February 2016

$$\text{Net Sentiment Rating (NSR)} = \frac{\text{Positive} - \text{Negative}}{\text{Positive} + \text{Negative}}$$

Fig. 4.8 Top keywords in Weibo posts mentioning education in the UK and other key countries



Fig. 4.9 Top keywords used by survey respondents to describe UK education



Base: All respondents except those that answered "nothing" / "don't know" (4,479 respondents)

with UK education. Meanwhile, 0.8 per cent of respondents mentioned Harvard University, making this the fourth most mentioned ‘UK’ education institution despite actually being located in the US.

Focus groups with potential students showed that the UK’s education system is very highly regarded. The reputation or ranking of UK universities was a major decision factor for most students who wanted to study in the UK, while those aiming for other destinations still saw high-quality education at elite universities as one of the UK’s major advantages.

Potential students – especially those wanting to study at the undergraduate level – also saw the more open education environment as a major advantage of UK education. UK university study was seen as freer and less hierarchical than China, as well having more focus on the application of knowledge rather than pure theory. This was seen as a general advantage of overseas or Western education in general rather than something confined to the UK.

Another key advantage of UK education discussed by many students was the one-year duration of master’s courses, rather than the two years or more needed in most competitor destinations. This was seen as a strong advantage by many students and the main reason to choose the UK for some, although a minority of students felt that this reduced the value of a UK master’s degree.

On the other hand, UK education was also seen as a very expensive option, even by students from wealthy families. In some cases the more open study environment was also seen as a disadvantage, as it would require more self-discipline.

The British Council’s 2014 *As Others See Us* research also showed very positive

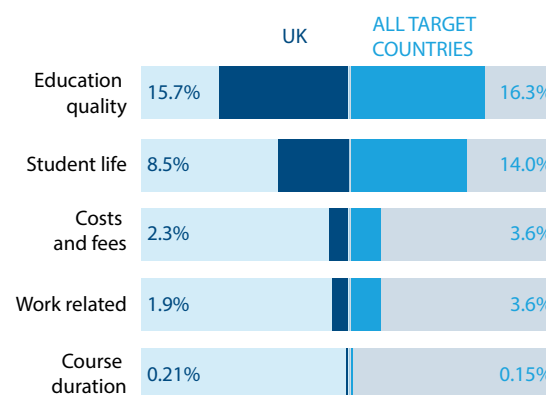
attitudes in China towards UK education among Chinese young people. 84 per cent believed that the UK “has world-leading universities and academic research” and that “the UK education system fosters creativity and innovation”, while 82 per cent agreed that the UK offers internationally recognised qualifications. In all three cases, Chinese people’s attitudes were much more positive than the average across five overseas countries and second only to the attitudes of young people from India.

ONLINE DISCUSSION OF PARTICULAR ASPECTS OF OVERSEAS EDUCATION

Social media posts were further analysed to uncover the most important factors in students’ study decisions. The ratio of posts on education quality compared to other key factors is much higher for the UK than for overseas study as a whole, suggesting that students considering studying in the UK place more weight on this factor than those looking at other destinations (see Figure 4.10).

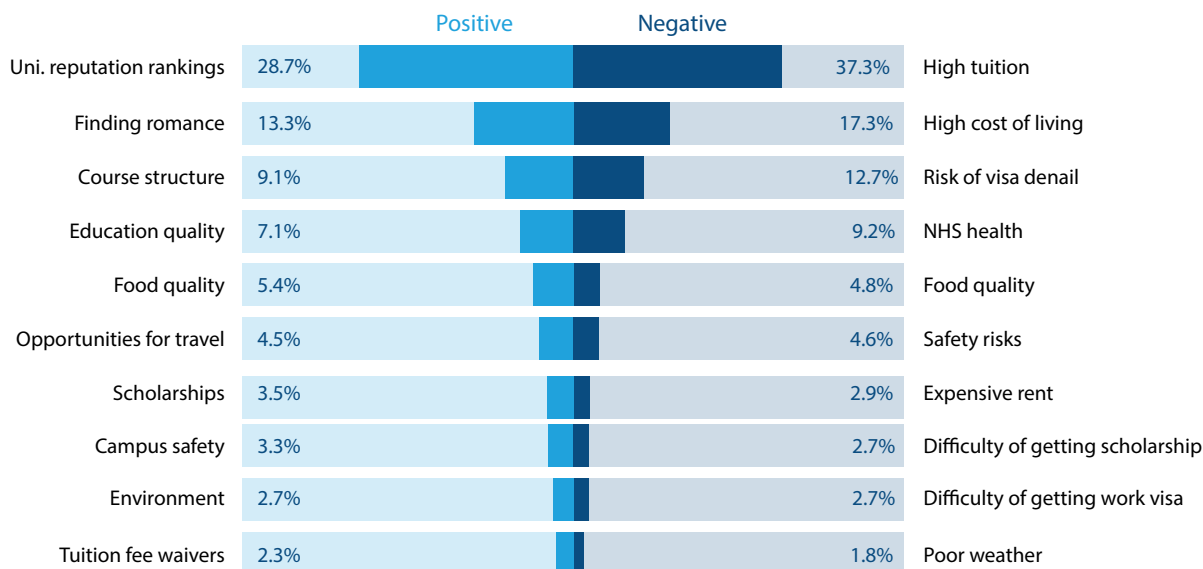
The proportion of posts related to student life and fees or other costs in the UK was

Figure 4.10 Breakdown of buzz related to aspects of education



Base: Weibo posts mentioning education in target countries or regions, March 2015 – February 2016 (~1.1 Mn posts)

Figure 4.11 Weibo buzz related to positive and negative aspects of UK education



Base: Weibo posts mentioning education in the UK or other key countries or regions, March 2015 – February 2016 (~1.1 Mn posts)

smaller than for overseas study destinations as a whole, although this is likely due to the higher volume of posts on education quality. However, there is an even larger difference between destinations in the number of posts mentioning both education and work⁸. As with the relative lack of immigration-related posts discussed above, this is likely because it is comparatively difficult to stay and work in the UK after graduation compared with other key destinations. This has a direct effect on discussion and also means that students for whom this is an important factor are less likely to consider the UK.

The one factor which is more likely to be mentioned in connection with the UK than with other countries is course duration. The UK's one-year master's degrees and three-year bachelor's degrees are seen as an important advantage by many Chinese students, as most other destinations have a longer study duration. In addition to the

amount of time taken, this also has a strong effect on total tuition fees and other costs.

Among posts tagged as specifically discussing the positive aspects of UK education, education quality and university rankings were unsurprisingly the most-discussed point. However, the second most commonly mentioned factor was something that is less controllable by universities: finding romance (see Figure 4.11).

Although romance is rarely mentioned in student survey responses, the chart above shows that it is among the most commonly discussed subjects when netizens talk about their international education experiences and expectations online. This behaviour should remind us that study decisions are part of a larger life narrative that extends far beyond the immediate objectives of education and career, even if students tend to externally rationalise their decisions in these terms. In communicating to potential students, education institutions should not be

⁸ Text analysis did not differentiate between discussion of part-time jobs as a student compared to finding work after graduation.

misled by the relatively one-dimensional character sketches that emerge from surveys and focus groups⁹.

Similarly, travel opportunities were also a positive factor among Chinese students and potential students talking about UK education. Some students also shared their positive opinions of British food, although this is also the fifth-most commonly discussed disadvantage. On the other side, most negative posts talked about financial issues such as tuition fees or living expenses, including the NHS health surcharge which had recently been introduced at the start of the period covered by the research. Both positive and negative posts often mentioned more than one factor.

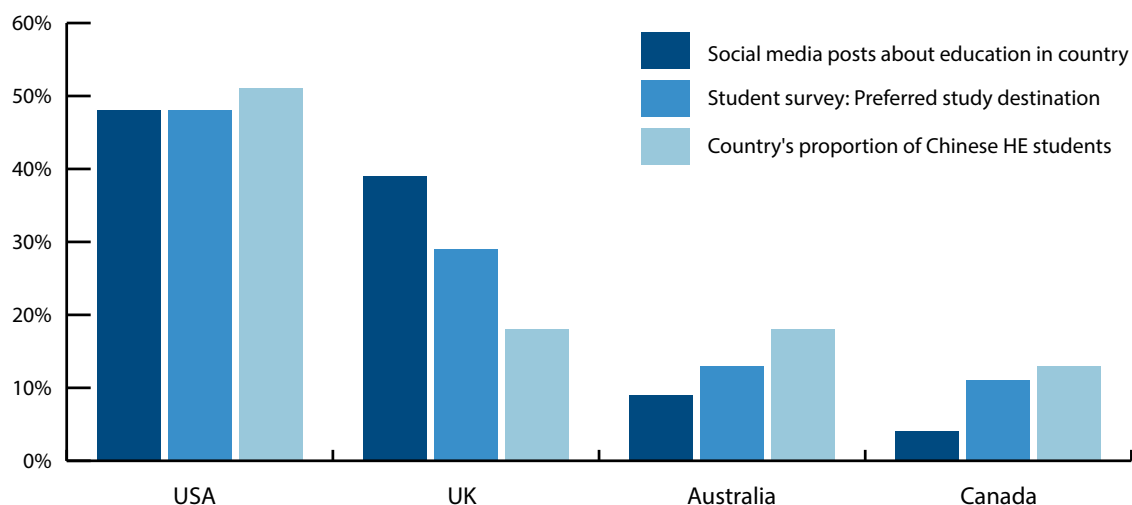
⁹ Romance is an important part of student life, and stories of successful relationships can help to build a positive image of the international study experience for potential students. A 2014 study by the European Commission estimated that a quarter of participants in the Erasmus study-abroad scheme met their long-term partner while studying abroad, and the programme had been responsible for the births of one million children since it launched in 1987. Erasmus Impact Study, European Commission, 2014.

IMPACT OF INITIAL COUNTRY PREFERENCES ON STUDENTS' EVENTUAL OVERSEAS STUDY DECISIONS

As discussed earlier in the chapter, a large proportion of Chinese students rated the UK as their most-preferred overseas study destination, and the UK accounts for an even larger share of social media traffic discussing overseas education. Taken as a share of the four major English-speaking destination countries, the UK accounts for almost 40 per cent of education-related social media discussion and 29 per cent of initial study preferences among students who say they are at least considering studying abroad. In both cases the UK is behind the US but far ahead of Australia, Canada, or even these two countries combined.

However, these two indicators both reflect students at a relatively early stage of their decision process. Many of these students will eventually decide not to study overseas, while others will go to a country other than

Fig. 4.12 Interest in key study destinations vs. actual market share



Base: Weibo posts mentioning education in the UK or other key English-speaking countries, March 2015 – February 2016 (~880,000 posts); Students who said they definitely wanted to study abroad or were considering it and chose one of these countries as their most-preferred destination (581 respondents); Mainland Chinese HE students in these countries, 2015(-16) (~543,000 students)

the one they initially preferred.

Among actual overseas students, the UK's share of the number of Chinese students actually studying abroad is significantly smaller than these figures would predict (see Figure 4.12). In the 2015/16 academic year, the most recent for which data is available, only a little over 18 per cent of Chinese HE students in the four major English-speaking destinations were studying in the UK.

In contrast, Australia and Canada perform significantly better in terms of real student numbers than would be expected from their share of social media traffic or the preferences expressed by the students we surveyed who are considering overseas study.

Taken together, this implies that cultural interest and students' initial perceptions give the UK a strong initial advantage, but this is advantage fades (although it never completely vanishes) as students consider their decisions more deeply.

Student interviews suggest that the UK's visa policy may play a role in impeding the

conversion from initial interest to actual enrolments. Almost all Chinese students who look closely into overseas study options see the UK as offering less chance of staying on to work after graduation compared to other English-speaking countries. Only a relatively small minority of students said they plan to move overseas permanently, but many more said that they plan to stay for a year or two after graduation to gain overseas work experience and improve their employability – or even that they *might* want to do this and would prefer to keep their options open.

The perceptions of Chinese students in this area appear to be more negative than the reality. Most are not aware of the finer details of the UK's visa policy, and many associate a lack of formal post-study work schemes with having no opportunity to work in the UK at all. The UK education sector could do a better job of making students aware of the opportunities that do exist, such as the Tier 1 (graduate entrepreneur) visa or the advantages that recent graduates of UK universities enjoy when applying for a Tier 2 visa.

5. HOW CULTURAL INTEREST IMPACTS OVERSEAS STUDY

Students expressing an interest in overseas culture were much more likely to want to study abroad, and preference for a particular country's culture was a strong indicator of a student's preferred study destination. The aspect of culture a student is interested in can also have a strong effect on interest in studying abroad.

Surveys of potential international students carried out by a number of organisations – including the British Council – have consistently found that interest in a host country's culture is a key factor in study abroad decisions.

One example can be found in a report published by Vision Overseas, a branch of language training company New Oriental and one of the country's largest overseas study agencies. The report, which was based on a survey of 3,700 mainland Chinese participants interested in overseas education, found that 40 per cent of students saw the destination country's culture as one of their main decision factors¹. This was the second most common answer among students, behind only education quality and above factors such as fees, scholarships or immigration opportunities.

Even among the parents of potential students, culture was still an important factor. The same report showed that 31 per cent of parents listed the destination country's culture as one of their key decision factors, placing it third behind education quality and the country's overall

(economic) strength. Respondents listing the UK as their preferred destination were even more likely to cite culture as an important factor, making an understanding of cultural factors particularly important for UK institutions.

This factor may be even more important among younger students. A report by AFS Global, based on a worldwide survey of 5,255 students aged 13 to 18, discovered that two thirds of respondents placed more value on the cultural experience of studying overseas than on scholastics and education². Although Chinese students emphasised the importance of culture less than respondents from other countries, the proportion saying that cultural exploration was more important was still almost 50 per cent.

Similarly, culture is a particularly important factor in selecting short-term overseas study programmes. According to survey research carried out by Ipsos for New Oriental, more than half of participants rate 'experiencing the cultural difference between China and the West' as one of their major reasons for joining these short-term programmes³. 'Expanding horizons

¹ *White Book of China's Study Abroad 2015*, New Oriental Vision Overseas, 2015.

² *Mapping Generation Z*, AFS Global, 2017.

³ *Global Study Tour White Paper*, Ipsos, 2016.

and increasing knowledge’ was an even more common reason, chosen by two thirds of participants. Research from the British Council and English UK shows that more than 90 per cent of agents representing UK summer school programmes in China think experiencing overseas culture is one of their students’ main reasons for attending these programmes, a higher proportion than any other factor.

Survey research carried out for this report confirmed a very strong link between self-declared interest in overseas culture and interest in studying abroad. Among current Chinese students (at the high school or university levels) who said they were ‘very interested’ in overseas culture, around four in five said that they either definitely wanted to study abroad or that they were considering it (see Figure 5.1).

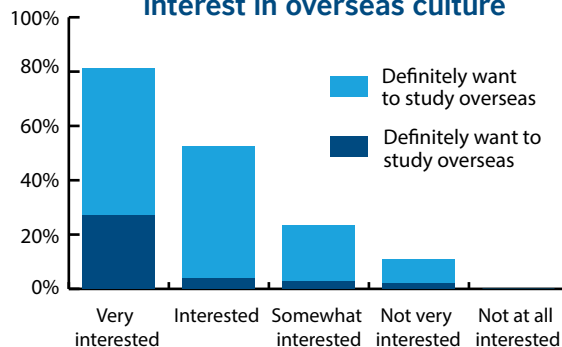
At the other end of the scale, only around one in ten students who described themselves as ‘not very interested’ in overseas culture wanted to study abroad. Among the few students who said they were ‘not at all’ interested in overseas culture, none wanted to study abroad.

There is a similar although less pronounced trend among parents of current students (see Figure 5.2). When asked about whether they would consider overseas study for their child, the proportion of parents who described themselves as either considering or definitely wanting to do this was substantially larger among those who described themselves as more interested in overseas culture.

FACTORS LINKING FOREIGN CULTURAL INTERESTS AND OVERSEAS STUDY

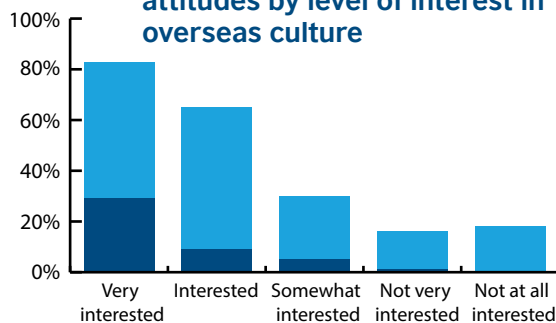
The link between interest in foreign culture and the desire to study abroad applies at all levels of education, but appears to be

Fig. 5.1 Students’ attitudes towards overseas study by level of interest in overseas culture



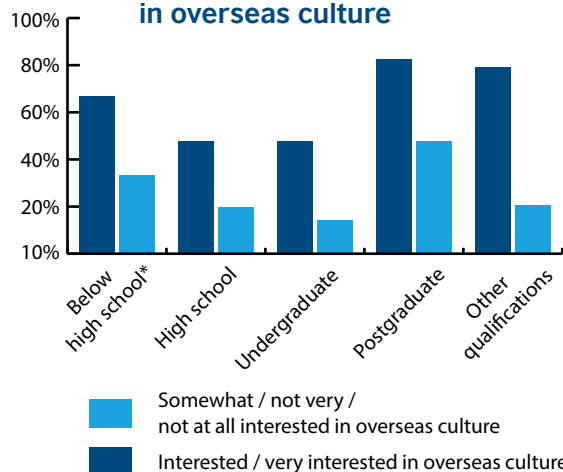
Base: All current students (1,633 respondents)

Fig. 5.2 Chinese parents’ overseas study attitudes by level of interest in overseas culture



Base: All parents (1,712 respondents)

Fig. 5.3 Chinese students’ overseas study attitudes by current level of study and interest in overseas culture



Base: All current students (1,633 respondents)

strongest at the undergraduate level. Current undergraduate students who described themselves as interested or very interested in overseas culture were more than three times as likely to say they were at least considering overseas study compared to their counterparts who were less interested in overseas culture, while the proportion was closer to 2-to-1 at most other levels of study. Meanwhile, current postgraduate students were the most likely to be interested in further overseas study overall, even among those who described themselves as less interested in foreign culture (see Figure 5.3).

Among parents, interest in sending their children abroad to study varied significantly by the respondent's age, with younger parents demonstrating much greater interest (see Figure 5.4). But it should be noted that these parents are unlikely to send their children to study abroad any time soon.

Among parents who said they wanted their child to study overseas or were considering it, 65 per cent were interested in postgraduate study and 48 per cent were interested in undergraduate programmes, compared to fewer than 8 per cent who were interested in study at the high school level or below. Even among the 25-29 age group only 9 per cent said that they wanted their child to study abroad at or below the high school level.

WHICH ASPECTS OF CULTURE MATTER MOST?

Our survey results showed that interest in some aspects of overseas culture emerged as better predictors of overseas study intentions than others. The area of culture with the strongest link to study abroad intentions appeared to be interest in foreign sports teams. Students at all levels from high school to postgraduate⁴ were more likely to

⁴ Excluding the 'below high school level' group, but the number of respondents at this level was very low and findings were not statistically significant.

say they were interested in overseas study if they named sports as one of the three aspects of overseas culture they were most interested in; similarly, this was one of the strongest indicators for both male and female students.

Interest in overseas brands, local people and technology and innovation were also good signs that students would also be interested in overseas study.

Students who named celebrities or media among their top 3 overseas culture interests were noticeably less likely to want to study abroad, compared to other students who said they were interested in overseas culture (see Figure 5.5). However, they were still significantly more likely to want to study abroad compared to those who said they were not interested in overseas culture.

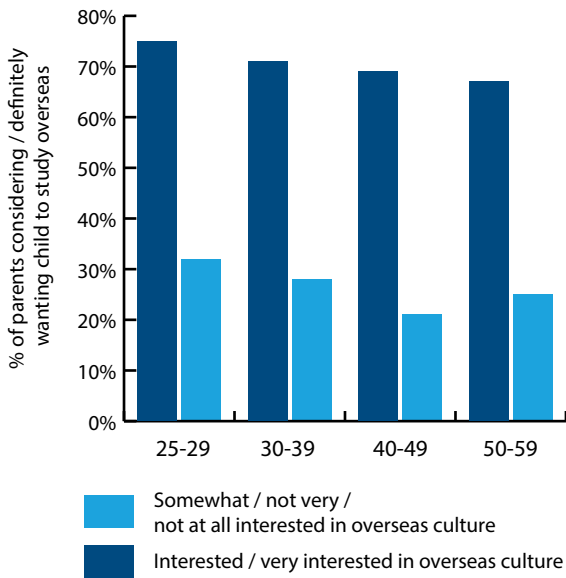
A similar trend could be found among parents, although it was somewhat less pronounced. Those who named celebrities as one of their main interests in terms of overseas culture were slightly less likely to want their children to study abroad, while those who admired foreign brands and overseas literature were the most likely to be interested.

INFLUENCE OF PREVIOUS OVERSEAS TRAVEL ON OVERSEAS STUDY ATTITUDES

Respondents were also asked if they had previously visited overseas countries. Overall, students who had travelled outside of China were 61 per cent more likely to say they were considering overseas studies than those who had not.

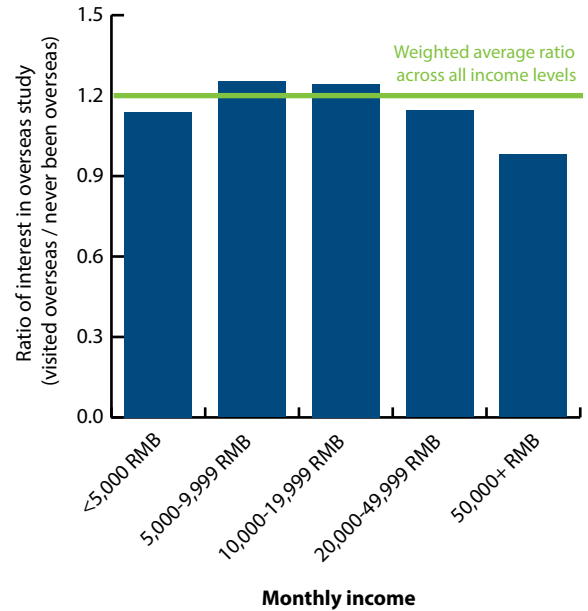
The effect was smaller, although still significant, after correcting for two other factors which are strongly associated with both overseas visits and overseas

Fig. 5.4 Chinese parents' overseas study attitudes by age group and level of interest in overseas culture



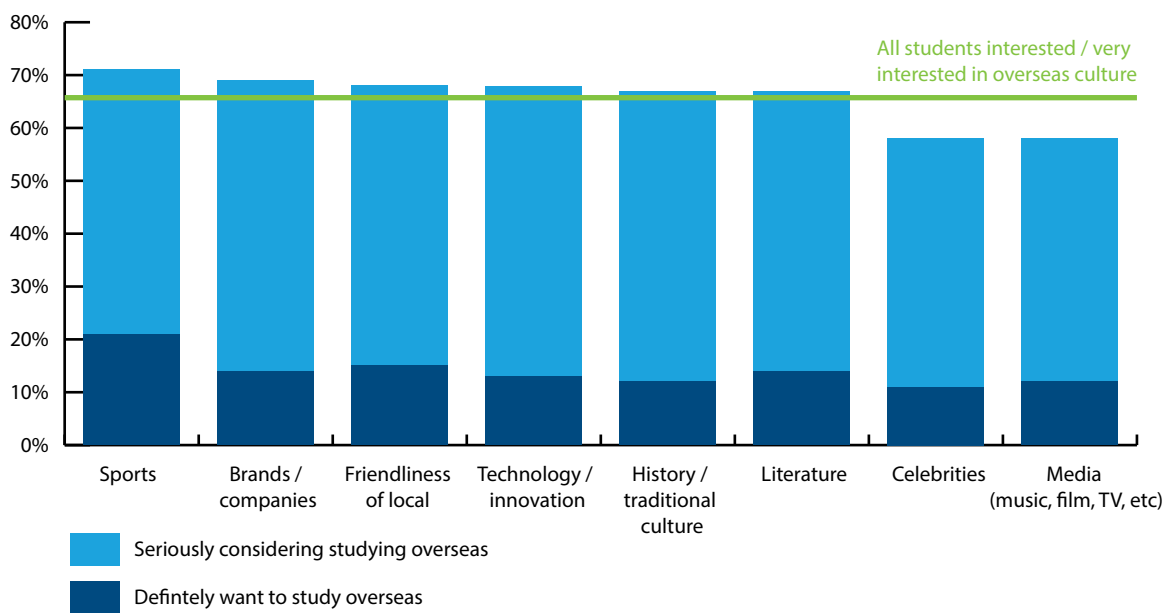
Base: All parents (1,712 respondents)

Fig. 5.6 Impact of prior overseas visits on interest in studying abroad, by income level



Base: Students interested or very interested in overseas culture and reporting household income (1,248 respondents)

Fig. 5.5 Overseas study attitudes by interested aspects of overseas culture



Base: All parents (1,712 respondents)

study intentions. Limiting the analysis to students who were interested in overseas culture and controlling for household income, students who had been abroad were around 21 per cent more likely to say that they were at least considering overseas study and around 33 per cent more likely to say that they definitely wanted to study abroad (see Figure 5.6)⁵.

Visiting a country also appears to make a student more likely to want to study in that country. Although the number of visitors to any individual country was too small to give statistically significant results, when taken as a whole, students who had visited a given country were 78 per cent more likely to list it as their first choice study destination compared to those who had not visited⁶.

One form of overseas travel has a particularly strong effect on intention to study overseas. Overseas summer school programmes are increasingly common among Chinese students, and in a survey of participants in short-term overseas study programmes carried out by Ipsos and New Oriental, 80 per cent of participants in these programmes said that they were considering longer-term overseas study in the future⁷.

Part of the reason students attend these programmes is to test the waters for full degree options later on. Many attend summer programmes in multiple countries across their middle school or high school years, and their experiences can help to influence future study decisions. In a focus group discussion, one aspiring student said that her positive experience in a UK summer school programme had confirmed her intention to pursue a degree in the UK.

‘University tourism’ is also becoming increasingly common. Whether as part of a summer school programme or even a family visit, Chinese students or their parents often visit a UK university to look around. These visits have more in common with tourism than with serious research into potential study options, and may take place many years before the child is due to attend university. Nevertheless, there may be potential for some UK institutions to take advantage of this trend to raise their profile among Chinese young people and their parents.

IMPACT OF CULTURAL INTEREST ON PREFERRED STUDY DESTINATION

As described earlier, research from New Oriental shows that 40 per cent of potential Chinese international students saw the destination country’s culture as one of their main decision factors. The proportion from our survey was slightly higher – among students who said they definitely wanted to study abroad or were considering it, 48 per cent indicated that interest in culture was a factor in their choice of destination.

However, the impact of culture may be even stronger than this figure implies. Among students who were both interested in overseas culture and said that they were considering studying abroad, more than half said that their most preferred country in terms of culture was also their top preferred overseas study destination.

Even among students who said that cultural interest was not one of their top decision factors, students who preferred a country’s culture were more likely to choose it as their preferred study destination in every case, and in three countries the proportion was over 50 per cent. This shows that cultural interest can affect students’ study decisions indirectly as well as being something students specifically consider as a factor.

⁵ The true effect is likely slightly stronger than this, as the effect of culture on overseas visits works in both directions. Students who are more interested in overseas culture are more likely to have been overseas, but going abroad may also raise a student’s level of cultural interest.

⁶ This figure refers to all students who said they definitely wanted to study overseas or were considering studying overseas (921 respondents). It has not been adjusted to take into account for cultural preferences.

⁷ Global Study Tour White Paper, Ipsos, 2016.

Discussions with students in focus groups showed that in several cases interest in overseas culture had a direct impact on their plans to study overseas. One student said that she had first become interested in studying in the UK in her teenage years due to her love of Harry Potter. Although she emphasised that this was not her main reason for deciding to study in the country, and other factors such as career opportunities were more important, this was still the initial spark for considering the UK.

It must be acknowledged that the majority of potential students did not describe any aspect of culture as one of their main reasons for wanting to study abroad. However, as with the survey respondents, there was a strong connection between interest in a particular country’s culture and intention to study there, even if the student did not consciously see culture as an important factor in their decisions.

Looking at the top destination countries, two thirds of surveyed Chinese students who preferred US culture said that this was their preferred study destination, while the proportion was also over half for both the UK and Japan (see Figure 5.7). The only country where less than a third of those who preferred the culture said they wanted to study was South Korea.

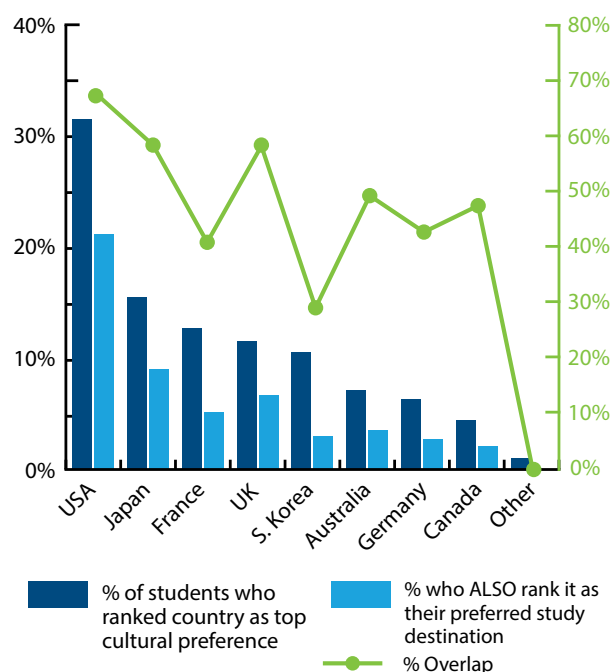
In the case of the UK, students who said they preferred UK culture were more than three times as likely to say they wanted to study in the UK, compared to the surveyed student population as a whole. Compared to those who named another country as having their favourite culture, they were 4.3 times more likely to choose the UK as their top study destination.

In most other countries, this trend was even more pronounced. Japan was the most extreme example, with students preferring Japanese culture being 13 times more likely to say they wanted to study there as those who did not.

As a result, despite the UK and Japan being similarly attractive study destinations to students that preferred the respective country’s culture, and slightly more students saying that they preferred Japanese culture, the UK is still 1.5 times as popular as a first-choice study destination overall.

The UK also performed well as a second-choice study destination – more surveyed students listed the UK as their second preference than any other country. This is partly a result as the large number of students who saw the UK as their second most preferred country on cultural grounds (often behind the US), but a substantial minority of students who said the UK was their second choice study destination did not list the UK as one of their preferred cultures.

Fig. 5.7 Links between cultural and study preferences



Base: Students who were interested or very interested in overseas culture; said they definitely wanted to study abroad or were considering it; and chose one of these eight countries as their most preferred in terms of culture (856 respondents)

ASPECTS OF OVERSEAS CULTURAL INTEREST AFFECTING PREFERRED STUDY DESTINATION

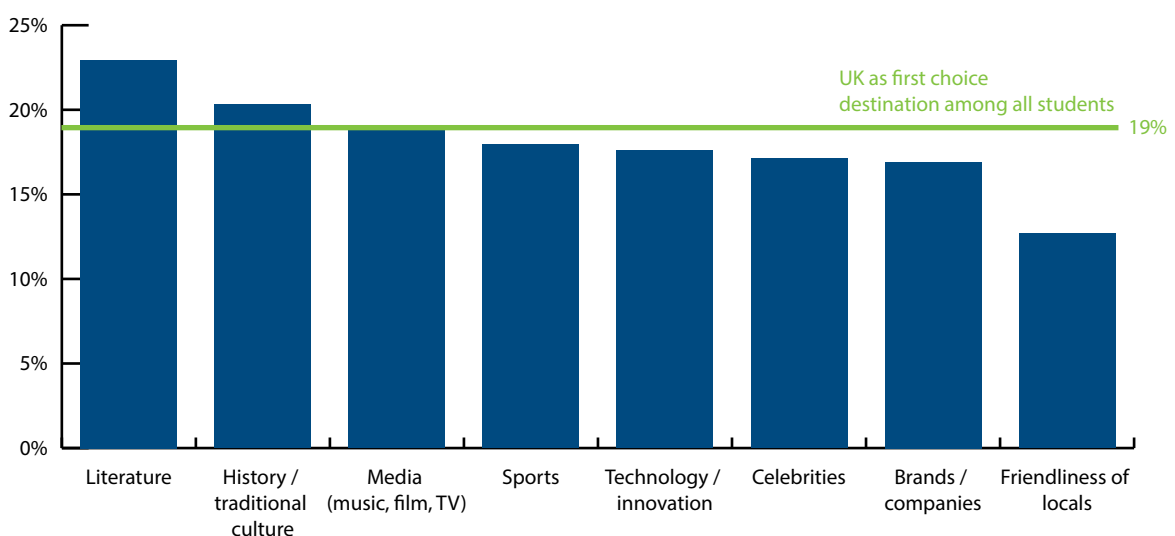
In addition to their overall effect on study-abroad attitudes, the areas of overseas culture students are most interested in also affect their preferred destinations (see Figure 5.8). For example, students who are interested in overseas literature are almost twice as likely to say they want to study in the UK compared to those who are more interested in interacting with local people.

There were also corresponding trends among other countries. Although the US was the most popular destination among students interested in each of these aspects of overseas culture, over 40 per cent of those who were interested in overseas sports teams said that they wanted to study in the US, compared with only a quarter of those who said that the most important aspect was the friendliness of local people (see Figure 5.9).

These results generally correspond with survey respondents' assessment of UK strengths in the appropriate fields. Although the UK has particular strengths in some areas such as literature and traditional culture, these are balanced against perceived weaknesses in other fields. Innovation emerged as a comparative weakness of the UK compared to the US, while Chinese people also see the UK as lagging behind this competitor in other fields such as brands, celebrities, media and sports. Meanwhile, the country is at a disadvantage compared to Australia and Canada when it comes to the perceived friendliness of local people.

This report shows that the successful promotion of UK education also depends strongly on the country's success in positioning itself in other areas. Despite the generally positive opinions most Chinese people hold of the UK in general and UK education in particular, this image could be improved even further if more was done to make Chinese people aware of the UK's strengths in other areas such as innovation and technology.

Fig. 5.8 Overseas study attitudes by interested aspects of overseas culture



Base: Students who were interested or very interested in overseas culture; said they definitely wanted to study abroad or were considering it; and chose one of the eight featured countries as their most preferred in terms of culture (856 respondents)

Fig. 5.9 Relative popularity of study destination by interest in cultural aspect

Country	Most popular among students interested in...	Least popular among students interested in...
US	Sports	Friendliness of local people
UK	Literature	Friendliness of local people
Japan	Celebrities	Brands / companies
France	Friendliness of local people	Brands / companies
Australia	Friendliness of local people	Celebrities
Germany	Brands / companies	Sports
Canada	Friendliness of local people	Sports
South Korea	Celebrities	Technology / innovation

6. CONCLUSIONS

Interest in overseas culture has a strong impact on attitudes towards overseas study

Interest in foreign culture is often the starting point of the journey to studying abroad. Our research confirms that there is a strong and direct link between Chinese students' interest in overseas culture and their attitudes towards studying overseas. Students describing themselves as interested or very interested in overseas culture were more than three times as likely to consider overseas study as those that had a lower level of interest. At the same time, the majority of students considering overseas study rate the country whose culture they prefer as their favourite study destination.

This link is not limited to students who consciously take culture into account when thinking about overseas study destinations. Instead, the connection between a student's preferred country in terms of culture and their preferred study destination is almost as strong among students who say cultural interest plays no role in their choice as among those that say this does affect their decisions. This suggests that the effect of interest in a country's culture on study decisions is mainly indirect rather than something students consciously consider.

Although cultural interest is not usually the main reason for a student to study

abroad, the study shows that it both helps to kick-start students' interest in overseas study, and gives an initial advantage to countries whose cultures are interesting to Chinese young people.

Chinese students have a generally favourable opinions of UK culture

The UK has a high profile compared with many competing destinations. Analysis of posts on the Chinese microblogging network Weibo show that discussion of UK culture – as well as the UK in general – is second only to the US, and that the proportion of these posts expressing a positive sentiment is even higher than for the US.

Similarly, among survey respondents, the UK was the third most likely country to be described as respondents' favourite or second-favourite overseas country in terms of culture, both overall and among students in particular. Among students, the only two countries performing better than the UK were the US and Japan, while their parents' generation place the country's culture behind that of the US and France.

UK culture was particularly preferred by respondents who expressed an interest in literature and in history and traditional culture. These two groups were also more likely than average to be interested in overseas study. Other groups who had a stronger-than-average affinity towards UK culture included female students and those living in China's largest Tier 1 cities such as Beijing and Shanghai, while students in major provincial Tier 2 cities such as

Chengdu were also more likely to prefer UK culture than those living in less developed parts of the country.

Despite strong advantages in fields like literature and history, there was a substantial gap between perceptions of the UK and those of the US in certain areas. In particular, survey respondents were substantially more likely to say that the US is strong in technology and innovation, compared to the number saying the same about the UK. Meanwhile, perception of the UK lagged behind Canada and Australia when it came to the friendliness of local people, which is was an important factor for students considering overseas study, while many student interviewees mentioned negative views of UK food. Addressing negative perceptions in these areas could help to boost the UK's attractiveness as a study destination even further.

In general, the strongest associations Chinese people have with the UK appear to relate to London, the Royal Family, elite universities, and the stereotype of the 'British gentleman'. UK literature and history were also frequently mentioned when respondents were asked what they associate with the country, while UK media such as music and TV shows were also seen as attractive. Social media chatter suggested that Chinese netizens see British people themselves as traditional, serious and even boring – but these views are not necessarily negative when it comes to attracting students to the UK's schools and universities.

UK education is therefore seen as attractive by Chinese students

The combined findings of surveys, social media analysis and interviews with potential students show that UK education is very highly regarded. When students considering overseas study were asked about their preferred destinations the UK

took a strong second place. This is mirrored in the large number of posts on Weibo discussing UK education, again second only to the US.

Much of this favourable sentiment is due to the high ranking and strong reputation of UK universities, but perceptions of UK culture also play a role. In particular, there is a strong link between the positive perception of the UK's elite universities and Chinese people's stereotypes of British people and culture as serious and traditional. At the same time, the image of a freer, less hierarchical and more open educational environment compared to China also contributes strongly to the attractiveness of UK study, particularly among potential undergraduate students.

UK educational institutions should be aware of the UK's image among Chinese students, and of the influence this image can have even on students who do not consciously see this as affecting their study decisions. They should also bear in mind the differences in attitudes towards UK study based on students' interests – in particular, students who are attracted to UK literature or traditional culture are noticeably more likely to want to study in the UK compared to their counterparts whose main cultural interests are sports or celebrities. When promoting UK education, institutions should try to build on potential students' positive perceptions while challenging impressions in areas where they are less positive.

However, the UK's actual performance in Chinese student recruitment is poorer than expected given students' initial preferences

Unlike much other research about international students' preferences, this report targeted a broad audience rather than just students who were already actively researching studying abroad. As a result, instead of reflecting students'

eventual study decisions, it instead reflects their initial preferences and attitudes towards the UK before they start to look more deeply into overseas study options.

When these preferences are compared to students' actual study decisions, the UK's real share of the Chinese overseas study market is substantially lower than would be suggested by students' expressed preferences or the amount of online discussion of UK education. In contrast, the number of Chinese students in Australia and Canada is much larger than survey findings or online discussion volume would suggest.

Focus group findings suggest that although many factors such as university rankings, subject specialisms and tuition fees affect student decisions, visa policy stands out as a negative influence on the UK's attractiveness. Few students base their decisions solely on this issue, and Chinese students graduating from programmes abroad now tend to return to China immediately following graduation. Yet for young adults wanting to keep their options open, the UK offer is at a disadvantage compared to the clear post-study work options offered by the major competitors.

Moreover, many Chinese students also have low awareness of the UK policies that do support post-graduation work options, such as the easier transition from UK study to a Tier 2 visa. Better promotion of these options could help to make the UK more attractive from this angle.

Overall the UK's share of Chinese overseas students remains relatively high. Favourable perceptions of UK educational institutions are supported by Chinese people's attitudes towards UK culture, which our research has found to be strongly positive in most areas.

While the China market is expected to change considerably over the next decade, with slowing growth in the number of students going abroad and more aggressive competition from other study destinations, the UK's cultural dividends and reputation for excellence in education put it on firm footing for continued success in one of the world's largest and most dynamic markets.

7. APPENDIX: SURVEY QUESTIONNAIRE

PART 1: BASIC INFORMATION

1. What year were you born?

2. Do you have any children?

[Multiple choice; choose 1]

- Yes
- No

3. Are you currently a student?

[Multiple choice; choose 1]

- Yes, in lower secondary school or below
- Yes, in high school
- Yes, studying for an undergraduate degree (bachelor's or higher vocational)
- Yes, studying for a postgraduate degree
- Yes, at some other level
- No, I'm taking a temporary break from studying
- No, I'm no longer a student

PART 2: INTEREST IN OVERSEAS CULTURE

4a. Which overseas country's popular culture do you most prefer?

[Multiple choice; choose 1; randomised order]

- Australia
- Canada
- France
- Germany
- Japan
- South Korea
- UK
- USA
- Other (please specify)

4b. Aside from the country you mentioned in the previous question, which overseas country's popular culture do you most prefer?

[Multiple choice; choose 1; randomised order]

- Australia
- Canada
- France
- Germany
- Japan
- South Korea
- UK
- USA

- Other (please specify)

5. Overall, how interested are you in overseas culture? [Multiple choice; choose 1]

- Very interested
- Interested
- A little interested
- Not very interested
- Not at all interested

6. Which aspects of overseas culture are you most interested in? (Please choose up to three options) [Multiple choice; choose up to 3]

- Celebrities
- Brands / companies
- Literature
- Media (such as music, film or TV)
- Sports
- Local people
- Technology / innovation
- History / traditional culture
- Other attractive aspect(s) (please specify)

7. Thinking about the United Kingdom, how attractive do you find the following aspects of this country's culture? [8x multiple choice; choose 1]

[Very attractive | Attractive | Neutral / Unsure | Not very attractive | Unattractive]

- Celebrities
- Brands / Companies
- Literature
- Media (such as music, film or TV)
- Sports
- Friendliness of local people
- Technology / Innovation
- History / traditional culture

8. Thinking about [other country*], how attractive do you find the following aspects of this country's culture? [8x multiple choice; choose 1]

[Very attractive | Attractive | Neutral / Unsure | Not very attractive | Unattractive]

- Celebrities
- Brands / Companies
- Literature
- Media (such as music, film or TV)
- Sports
- Friendliness of local people
- Technology / Innovation
- History / traditional culture

PART 3: STUDYING OVERSEAS

Students**

9. To what extent are you interested in studying overseas? [Multiple choice; choose 1]

- Definitely want to study overseas
- Seriously considering studying overseas
- Potentially interested in studying overseas
- Not very interested in studying overseas
- Definitely don't want to study overseas

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Parents**

9. To what extent are you interested in your child studying overseas?

[Multiple choice; choose 1]

- I definitely want my child to study overseas
- I am considering sending my child to study overseas
- I am potentially interested in my child studying overseas
- I am not very interested in my child studying overseas
- I definitely don't want my child to study overseas

Students**

10a. If you were to study overseas, which country would you be most interested in studying study in?

Parents

10a. If your child were to study overseas, which country would you most prefer they study in?

Students**

10b. Aside from the country you mentioned in the previous question, if you were to study overseas, which country would you be most interested in studying study in?

Parents**

10b. Aside from the country you mentioned in the previous question, if your child were to study overseas, which country would you most prefer they study in?

Students**

11. If you are interested in studying overseas, what level(s) of course are you considering studying? [Multiple choice; choose any number]

- High school or below
- Undergraduate degree
- Postgraduate degree
- Language course
- Professional course

Parents**

11. If your child was to study overseas, what level(s) of course would they be likely to study?

[Multiple choice; choose any number]

- High school or below
- Undergraduate degree
- Postgraduate degree
- Language course
- Professional course

Students and Parents**

12. Which of these factors are the most important when choosing a place to study overseas?

[Multiple choice; choose up to 3]

- High-quality education
- Welcoming to overseas students
- Safe place to study
- Cost of studying
- Interest in local culture
- Opportunities to work in a country after graduating

- Attractiveness of a country as a place to live
- Other important factor(s)
- (please specify) _____

13. Thinking about the United Kingdom, how strongly do you agree with the following sentences?
[7x multiple choice; choose one]

[Strongly agree | Somewhat agree | Neutral / Unsure | Somewhat disagree | Strongly disagree]

- This country has high-quality education
- This country is welcoming to overseas students
- This country is a safe place to study
- Studying in this country is very expensive
- I am interested in the local culture of this country
- There are good opportunities for overseas students to work in this country after graduating
- This country is an attractive place to live

14. Thinking about [other country*], how strongly do you agree with the following sentences?
[7x multiple choice; choose one]

[Strongly agree | Somewhat agree | Neutral / Unsure | Somewhat disagree | Strongly disagree]

- This country has high-quality education
- This country is welcoming to overseas students
- This country is a safe place to study
- Studying in this country is very expensive
- I am interested in the local culture of this country
- There are good opportunities for overseas students to work in this country after graduating
- This country is an attractive place to live

PART 4: ATTITUDES TOWARDS THE UK

15. When the UK is mentioned, what is the first thing you think of?

16. What area do you think is the UK's greatest strength?

17. What do you think is the UK's greatest weakness / disadvantage?

18. When UK education is mentioned, what is the first thing you think of?

PART 5: ABOUT YOU

19. What is your gender? [Multiple choice; choose 1]

- Male
- Female

20. Where do you currently live? (City/Province)

21. Have you ever lived in, studied in or visited any of the following countries? [Multiple choice; choose any number]

- [Lived there / Studied there / Visited]
- UK
- [other country*]
- Anywhere else outside mainland China

22. What is your current household income? (If your parents are supporting you financially, please answer according to their income rather than your own) [Multiple choice; choose 1]

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- Below 5,000 RMB / month
- 5,000-9,999 RMB/month
- 10,000-19,999 RMB/month
- 20,000-49,999 RMB/month
- 50,000 RMB/month or above
- Don't know / don't want to say

* The 'other country' in Questions 8, 14 and 21 was selected randomly from Australia, Canada, France, Germany, South Korea, Japan and the USA. Each of these three questions asked about the same randomly-selected country.

** For the purposes of Questions 9-12, 'Parents' refers only to non-students who have children. Students with children were classed in the 'students' category. Non-students without children were not asked these questions.

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