

Measuring Our Cultural Dividends

How does interest in UK culture impact Chinese study decisions?

In surveys and interviews, students from mainland China often tell us that a country's culture is a key factor when deciding where to study abroad, but what exactly does this mean, and how does it affect the UK? The British Council designed this research to answer these questions by exploring perceptions of the UK and other competing study destinations in the world's largest student recruitment market. Our conclusions are based on a survey of 5,000 respondents, analysis of over 9 million posts on the microblogging website Weibo and focus groups conducted with prospective students.

The findings summarised in the following pages show that substantial cultural dividends support UK education institutions' engagement in China. The UK ranked among the three most popular foreign cultures in our survey, with particularly strong draw for respondents interested in literature, history and tradition. Moreover, our analysis of social media posts showed that the UK attracted the highest proportion of positive comments of the countries covered in the study. When our survey respondents were asked about the UK's strengths, science & technology and education topped the list.

Yet challenges to the UK reputation also emerged in the research. Though our survey results and social media analysis showed recognition of the UK's strength in science and innovation, other Western countries are often seen as stronger. The image of 'history and tradition' that draws some students may be interpreted as outmoded by others.

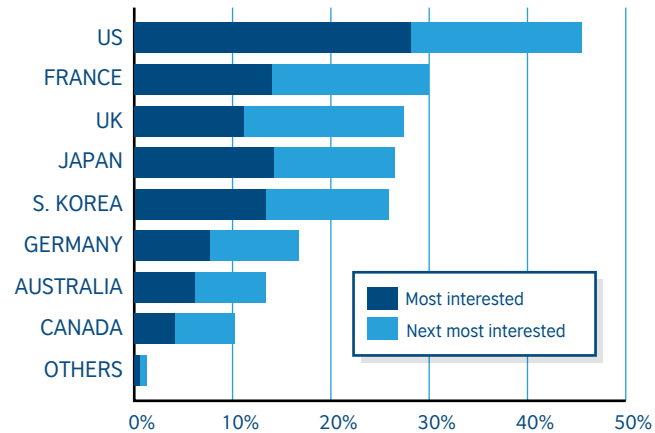
Our results also show a striking generational shift in cultural preferences; whereas older respondents tended to prefer Western countries, younger respondents showed greater affinity for neighbouring Asian countries. This is part of a broader trend of integration among Asia's developed economies and the gradual dissolution of historical tensions that have impeded intraregional exchanges.

Thus while our research answers many questions, it raises a much broader and more difficult one: What is the UK's place and role in an increasingly developed, capable and confident China? While this is complicated question whose answer will unfold over decades, we hope that this research is a starting point in preparing our institutions for change in one of the world's largest and most dynamic education markets.

1. UK among top three in cultural preferences

Asked which foreign cultures they find most interesting, the US, France and the UK ranked as respondents' top three choices.

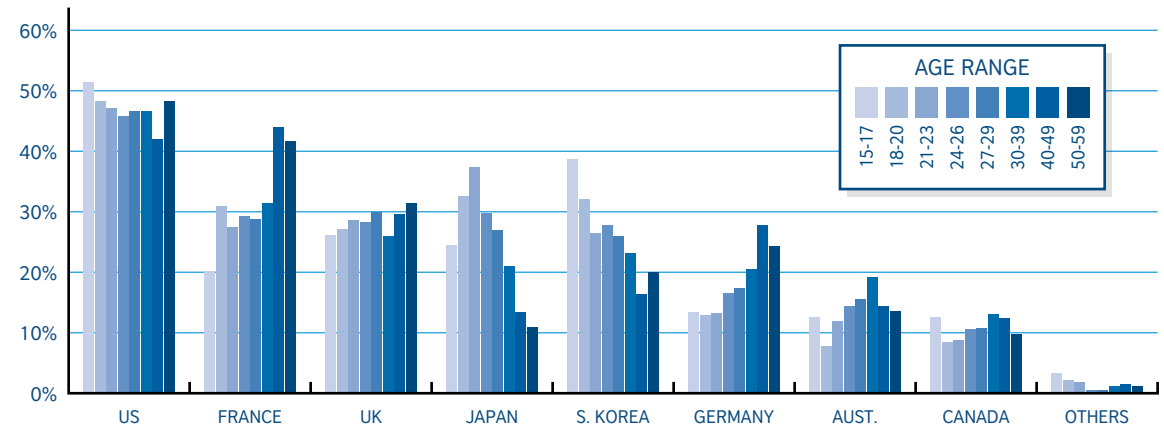
RESPONDENT'S INTEREST IN COUNTRIES' CULTURE



2. Younger respondents show stronger preference for Asian countries

Distinct generational differences emerged, with older respondents more drawn to French and German culture, while younger respondents were more likely to favour nearby Asian countries.

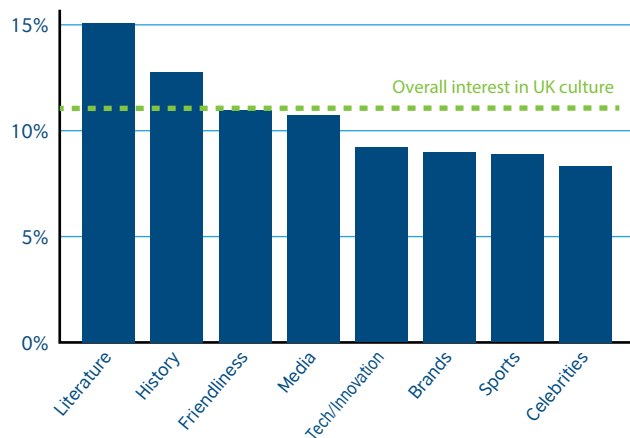
CULTURAL INTEREST IN COUNTRIES BY AGE RANGE



3. UK literature and history / tradition emerged as the strongest cultural draws

Those interested in literature or history showed stronger affinity for the UK than those interested in other cultural aspects.

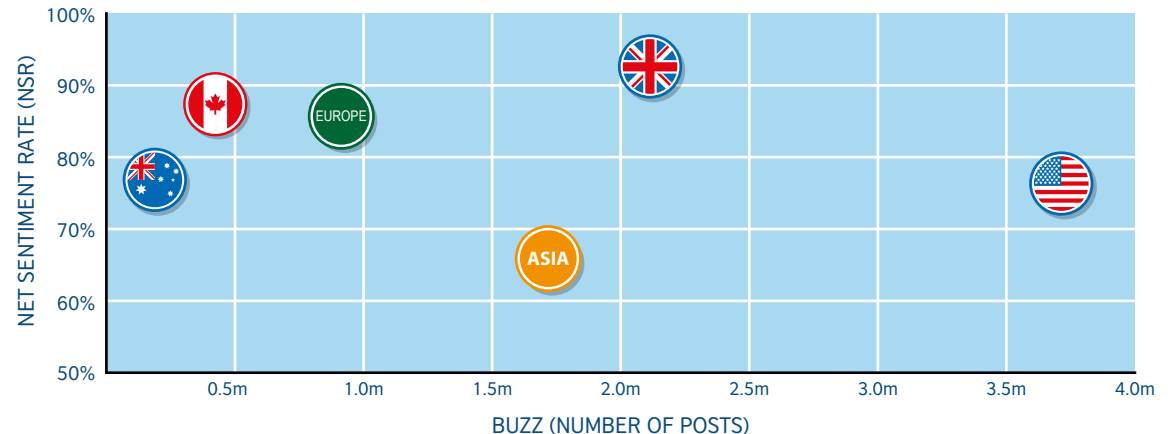
PREFERENCE FOR THE UK BY CULTURAL INTEREST



4. Social media buzz related to the UK was more positive than that of competitors

Analysis of posts on the social media site Sina Weibo showed that the UK generated the most positive social media buzz of all the major countries/regions we tracked.

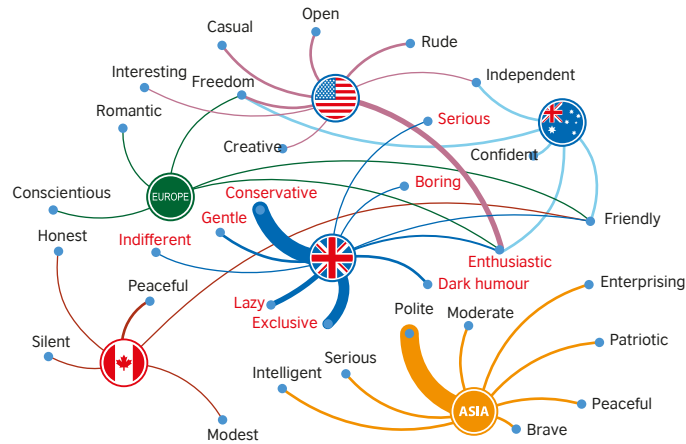
ONLINE BUZZ AND SENTIMENT REGARDING THE UK AND OTHER KEY COUNTRIES



5. Some negative associations with British people emerged on social media

Words associated with mentions of British people also highlighted some challenges to address in our communications

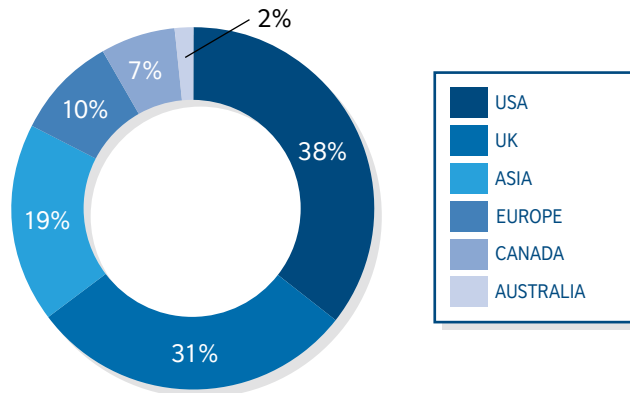
WEIBO PERCEPTIONS OF PEOPLE FROM THE UK AND OTHER KEY COUNTRIES



7. The UK captures an out-sized portion of Weibo social media posts discussing overseas study

UK study accounted for nearly a third of all discussion of overseas study on Weibo, suggesting that the UK brand recognition punches above its weight in the early stages of the decision-making process.

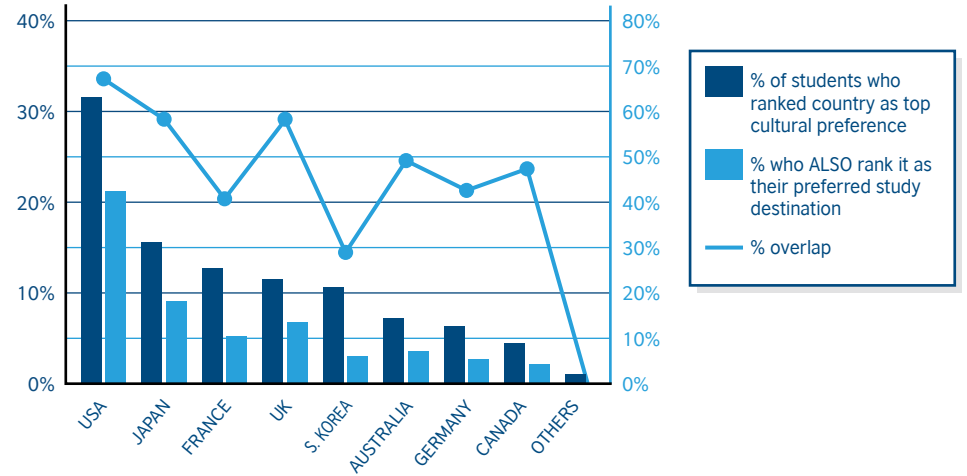
STUDY DESTINATION SOCIAL MEDIA MENTIONS



6. Study preference and cultural preference are closely linked

Survey results showed a strong link between the culture and study destinations that students preferred, with the US, Japan and the UK demonstrating the most overlap.

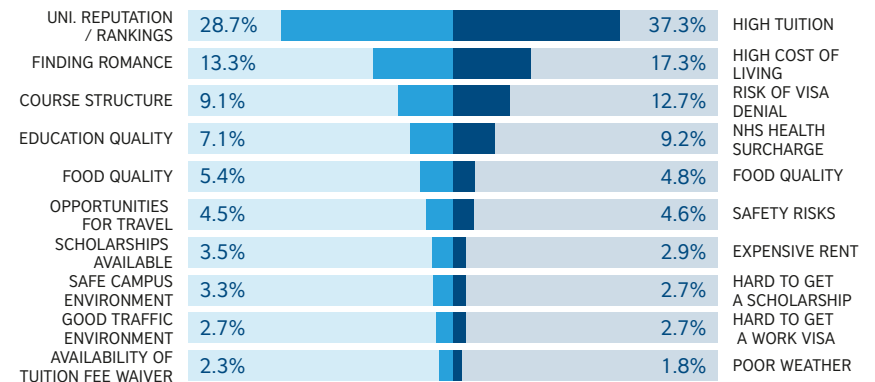
LINKS BETWEEN CULTURAL AND STUDY PREFERENCES



8. Analysis of social media posts shows that ranking and reputation aren't all that matter

Textual analysis of social media posts about UK education predictably showed a large amount of positive buzz around university reputation / ranking, but 'romance' emerged as the second most popular positive topic.

WEIBO BUZZ RELATED TO POSITIVE AND NEGATIVE ASPECTS OF UK EDUCATION



9. Word associations with UK education are dominated by elite institutions

When asked what first came to mind related to UK study, survey respondents tended to list elite institutions.

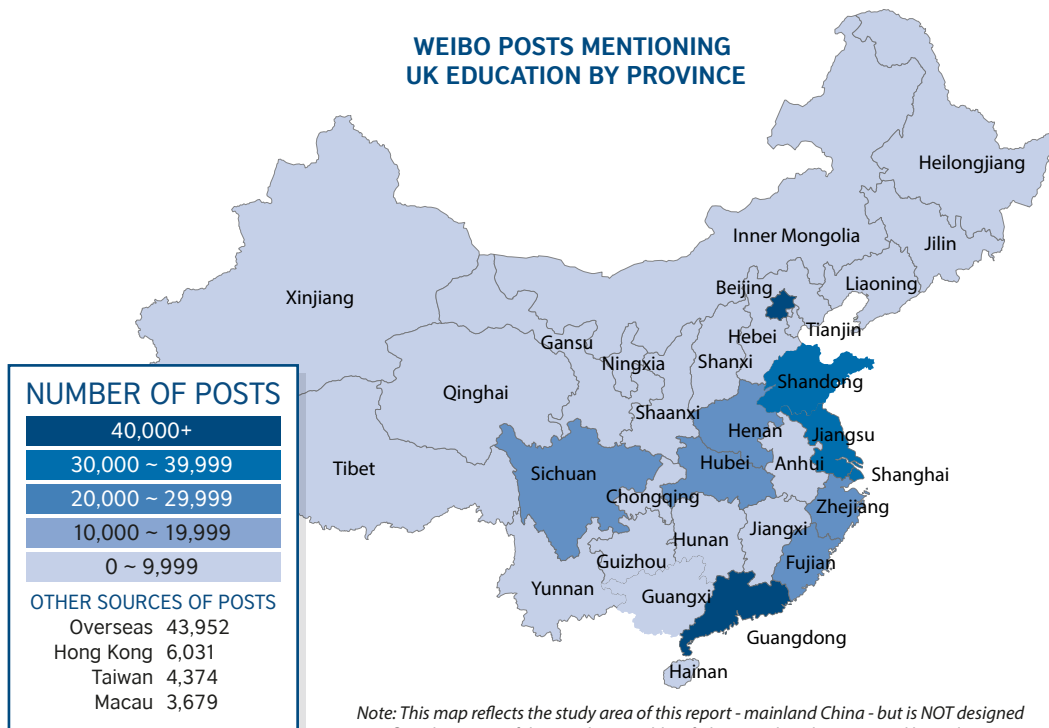
KEYWORDS ASSOCIATED WITH UK EDUCATION



10. Discussion of UK study was most intense in the developed, eastern provinces

Geographical patterns emerged in Weibo posts discussing UK study, with Beijing, Guangdong and the more developed eastern coastal provinces standing out.

WEIBO POSTS MENTIONING UK EDUCATION BY PROVINCE



Summary of Key Findings

- 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.
- Students who preferred a particular country's culture were also significantly more likely to also name that country as their preferred overseas study destination.
- 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 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.
- 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.
- Attitudes towards UK education were highly positive, with 93 per cent of Weibo posts related to UK education assessed as being positive in tone. The volume of these posts was substantially higher than posts about education in any other overseas country except the US.
- Our research showed that initial interest in UK study is much higher than actual student mobility would indicate. This is likely due to several factors:
 - Awareness of UK study is high because of its historical reputation and a large investment in general marketing over the past decades.
 - 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.
- While survey findings consistently identify university ranking and education quality as the most important decision-making factor for students, actual discussions of overseas study tend to emphasise other issues. Our analysis of 23,000 Chinese Weibo posts mentioning positive aspects of UK study showed that the second most popular topic was romance, ahead of education quality, course structure and scholarships.
- Our survey showed literature and history/tradition as the UK's strongest comparative cultural advantages. Universities have long recognised these as cultural dividends, but a reliance on themes of tradition and history can be a liability if not balanced with a narrative of modernity, creativity and innovation. 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.

Editorial Team



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Jazreel Goh is Director Education Services (East Asia) and leads a diverse team spread across 13 countries, delivering marketing and education consulting services for the UK education sector. She has over 20 years international education experience shared between China, Malaysia, Australia and Hong Kong, and in 2011 she established British Council's Education Intelligence Unit – the first e-marketing platform dedicated to international education research for the global industry. In 2013, she led the development of the UK's flagship outward mobility programme - Generation UK China.



Matt Durnin
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Specialising in the economics of education, Matt works with analysts across the region to provide clients with the data, analysis and insights required to succeed in Asia's dynamic education sector. In his time at the British Council, he has helped UK institutions to develop their international strategies and identify new partnerships and growth opportunities in transnational education. Prior to joining the British Council, Matt worked as Chief Researcher at the Financial Times' China Confidential team, delivering analysis on a broad range of topics and industries across China and East Asia. He also formerly held the posts of associate editor and visiting researcher at a US policy journal and think tank, where his work focused on China's foreign policy and technological innovation in the space and defense industries.



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Senior Analyst

Kevin Prest joined the British Council in 2014 as a Senior Analyst. His work covers diverse fields within the education sector, and previous projects have involved assessing potential local partners for transnational education partnerships, providing insights on local students' and stakeholders' needs, as well as monitoring and analysing key trends in the regional education market. Kevin has previously worked in market research across a variety of industries in China, including telecommunications, chemicals and construction materials. He holds a master's degree in physics from the University of Birmingham and has been based in Beijing since 2005.



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Over the past year James has worked as a researcher for the research and consultancy team at the British Council, co-ordinating projects ranging from market entry strategy to SWOT analysis for UK firms looking to expand in East Asia. He has a Master's degree from the School of Oriental and African Studies (SOAS), where he focused on China, globalisation and research methods.