

Measuring the cultural dividend

How does interest in UK culture affect
Chinese study decisions?

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ABOUT EDUCATION FUTURES

Education Futures is a series of in-depth reports produced by the British Council, designed to provide insights into global education opportunities for UK institutions. These reports are intended to help UK institutions to better anticipate and respond to changes in the international education landscape.

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1. EXECUTIVE SUMMARY

- This report updates and expands previous British Council research on the link between Chinese people's interest in overseas culture and their desire to study abroad. It is based on two separate rounds of focus groups and large-scale surveys in 2019 and 2021 respectively, as well as analysis of user-generated posts on Chinese social media.
- Chinese people's interest in overseas culture continues to be very high, with an even larger proportion of survey respondents describing themselves as interested in overseas culture compared to research conducted in 2016. Although there has been a moderate increase in interest in overseas culture even in China's largest cities, the bulk of the overall rise has been due to changes in China's smaller cities, which in recent years have seen a faster pace of development than their larger counterparts. Interest is roughly constant by age into the 30s before declining among respondents aged 40+, while being comparatively higher among wealthier groups, among residents of China's larger and more developed cities, and among students compared to non-students in the same age group.
- The last five years have seen substantial changes in Chinese people's answers when asked about their preferred overseas countries in terms of culture. The initial research, carried out in 2016 and published in 2017, showed that the US was by far the most preferred country, but when the same question was asked in late 2019 the proportion of people giving this answer had fallen substantially with the UK taking over as the most-preferred country. More recently, research in early 2021 showed that all Anglophone countries have fallen in popularity, with Asian countries (particularly Japan) and European countries becoming more likely to be named as people's favourite overseas country in terms of culture.
 - The most obvious reason for the change in perceptions of the United States is the rise in Sino-US tensions during the previous US administration – but the 2021 round of research was carried out around a month after Trump had left office, showing that simply changing the President is not enough to make attitudes change back.
 - While there was not a perfect correlation between perceptions of how countries responded to COVID-19 and the change in cultural attitudes between 2019 and 2021, there was a general trend for countries seen as having a more effective response to see an increase in cultural attraction and vice versa. Views of the US and UK's handling of the pandemic may have influenced the decline in the number of Chinese people rating them as their preferred overseas culture.
 - However, the change in perceptions considering specific aspects of culture in different countries as attractive / very attractive was much

smaller than the shift in the countries that were named as preferred overall, suggesting that interest in particular aspects of overseas culture may be less affected by short-term political trends and so may give a better long-term indication of cultural interest.

- While survey results do not show a decline in the attractiveness of UK culture, focus group discussions suggest that the country may be losing ground to competitors – at least in terms of popular media. Compared to five years ago, students were less likely to spontaneously name UK content when asked about their favourite books, movies and TV shows, and when asked specifically about UK media they tended to name older franchises such as Harry Potter.
- The research confirms previous findings on the importance of overseas culture to the overseas study plans of students. Students who described themselves as interested in overseas culture were substantially more likely to say that they wanted to study abroad than those that did not express such an interest, while those rating a particular country's culture as the most attractive had a much higher chance of also describing that country as their preferred overseas study destination. For example, 78 per cent of students who were interested in overseas culture and saw the UK as the most attractive overseas country in this area said that the UK was their first-choice study destination, compared to only 26 per cent of all students.
 - Interest in particular aspects of overseas culture also had a strong effect on both overseas study intention and students' choice of destination. Students who described themselves as interested in technology / innovation or in interaction with local people were the most likely to say they wanted to study abroad, while an interest in celebrities or media such as films or TV shows was less strongly associated with overseas study plans. Students who named literature and history among their cultural interests were particularly likely to choose the UK as their preferred destination.
 - Survey results reflect the initial thoughts of about overseas study. Statistics on China's actual outbound student numbers show that most of those who say they plan to study abroad will not actually do so. Focus group discussions show that as students actively engage with overseas study plans, cultural interest becomes less important as a decision factor, but it does retain a certain amount of importance in the final decision as well as spurring students to investigate these countries at the initial stages of their overseas study journey.
- Along with the shift in cultural interest, the proportion of Chinese students naming the UK as their preferred overseas study destination jumped sharply between 2016 and 2019, with the UK becoming the most-preferred overseas study destination. The UK was still the country most likely to be named as the first-choice study destination among Chinese students in 2021, but the COVID-19

period has seen a decrease in both the proportion of students saying they want to study abroad and the proportion of those who are considering overseas study naming the UK as their first-choice destination.

- Among the general Chinese student population, interest in overseas study was sharply lower in 2021 compared to before the COVID-19 pandemic. The proportion of students saying that they “definitely want to” study overseas has fallen from 18 to 10 per cent, while the proportion describing themselves as at least “seriously considering” it dropped from 68 to 55 per cent.
 - This change is linked closely to concerns about COVID-19. For example, students who thought the UK had handled the pandemic “relatively well” or “very well” were almost twice as likely to want to study in the country as those who said the opposite.
 - Focus group discussions suggest that this may overstate the actual impact. Students actively engaging with overseas study are generally positive that the situation will return to normal in the near future, but focus group participants confirm that the COVID-19 measures of an interest country is still an important concern. This concern is mainly related to ability to study in-person programmes abroad rather than personal safety.
- The increase in interest in UK study found in the surveys and student focus groups is mirrored by a corresponding increase in the number of Chinese students coming to the country in recent years. The research in this report shows that despite fairly negative opinions of the UK’s COVID-19 response the country remains the most attractive destination for Chinese students considering studying abroad, which is a positive sign for the recovery of Chinese student numbers after the pandemic period is over.
 - However, the strong link between cultural perceptions and study interest, and the sharp swing away from the US in terms of both cultural attractiveness and study interest between 2016 and 2019, show that the UK’s recent gains may be reversible. Improvements in US-China relations or a decline in the UK-China relationship could cause a similarly rapid shift in the opposite direction, showing that UK universities should avoid relying too heavily on students from China.

2. INTRODUCTION AND METHODOLOGY

Students often say that a country's culture is important when deciding where to study. But what exactly does this mean, and how have recent developments affected this?

When overseas students are asked about their intentions to study abroad and the process of choosing a country to study in, they often name cultural interest in the destination as one of their most important decision factors. In 2017 a British Council report, *Measuring the cultural dividend: How does interest in UK culture affect Chinese study decisions?*, found that interest in overseas culture was a strong predictor of Chinese students' interest in going abroad for further study, while interest in a particular country was an important driver of students' initial overseas study preferences. However, the study found a mismatch between this initial level of interest and actual student flows, with the UK's actual performance in attracting Chinese students falling behind the high level of interest in UK education.

The current report was conceived as a follow-up to the 2016-2017 study, with research initially conducted in late 2019 to investigate how attitudes and the influence of overseas culture on study decisions had changed in response to changing relations between China and traditional Western partners who are also major host countries for Chinese students. The research aimed to look at how attitudes towards overseas culture and overseas study had been affected by increased political tension, China's continuing economic development and increasing confidence, and the rise of Chinese universities in global rankings.

Like the previous research, this follow-up report focuses on mainland China due to the importance of Chinese students to the UK's education sector.¹ Students from mainland China made up 44 per cent of all UK student visa issuances in 2019, and the country continued to be the UK's top single source of new students even in 2020 with almost twice as many visas issued to Chinese students as to those from India, the second-largest source country. Given this large number of students, any changes in the attitudes of Chinese students could have a significant effect on the UK's higher education sector.

The international COVID-19 pandemic has affected the scope of the research, which was ongoing at the time of writing this report. The pandemic has affected the interest of young Chinese people in overseas study and their attitudes towards overseas countries more broadly. Additional research was carried out in early 2021 to better understand the extent of these changes.

The research in the current study draws from several sources:

- Analysis of user-generated posts on Chinese social media, especially the Weibo social network, which is similar to Twitter, as well as Q&A platform Zhihu and other online BBS forums.

¹ Unless otherwise noted, "China" and "Chinese" in this report refer specifically to Mainland China, excluding other regions such as Hong Kong, Macao or Taiwan.

- Two separate online surveys distributed through mobile survey platforms in late 2019 and early 2021.
- Focus groups with Chinese students planning to study abroad, including students aiming for the UK and those preferring other destinations, in late 2019 and early 2021.
- Previously published research and studies of Chinese student opinion and attitudes to overseas culture and international study, including previous British Council reports as well as third-party research.

Analysis of social media posts was based on posts made in the one-year period from November 2018 to October 2019.² Relevant posts were identified based on natural language mining tools with human quality assurance, and customised tools were used to analyse buzz volume, content and sentiment. The analysis covered a total of 9.1 million posts, including around 8.15 million posts on Weibo, 714,000 posts on Zhihu, and 235,000 posts on BBS forums.

Separate quantitative surveys were distributed in December 2019 and in March 2021 through a mobile platform. Users were targeted based on three factors: gender (equal numbers of male and female respondents), location (equal numbers of respondents from six regions: North, Northeast, East, South, Central and West China) and age (broken down into 8 separate age bands: 15-17, 18-20, 21-23, 24-26, 27-29, 30-39, 40-49, and 50-59). These age ranges helped to identify trends in interest in the UK and differences between today's prospective students and older generations.

Student focus groups were conducted in December 2019 and early January 2020 in Beijing, Hangzhou and Harbin, representing a highly developed Tier 1 city, the capital of one of China's wealthiest provinces, and a comparatively smaller provincial capital respectively. All student focus group participants intended to go abroad for university-level study. Each group included students interested in the UK as well as students interested in other major destination countries. Each focus group included representation of both potential undergraduate and postgraduate students intending to study overseas. An additional round of online focus groups was conducted in March 2021, including students from Beijing; Guangzhou, the capital of Guangdong province; Nanjing, the capital of Jiangsu province; and Chengdu, the capital of Sichuan province.

² Budgetary constraints meant that it was not possible to perform a similar analysis for the 2020-21 period.

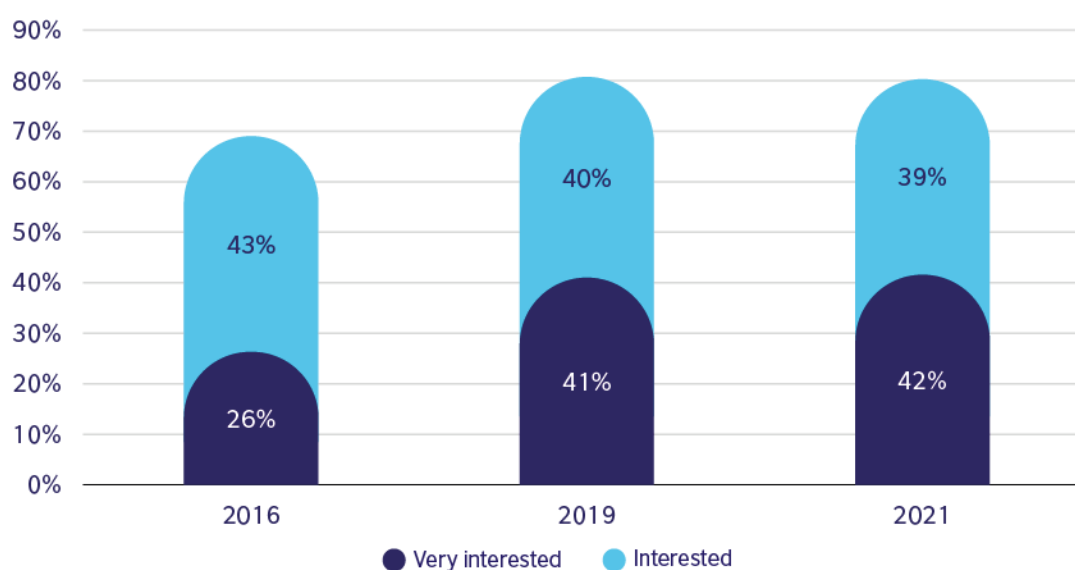
3. CHINESE PEOPLE'S INTEREST IN OVERSEAS CULTURE

3.1 Level of interest in overseas culture

The previous release of the British Council's *Measuring the Cultural Dividend* report, published in 2017 based on research conducted in 2016, found that Chinese people have strong interest in overseas culture. Survey results found that a substantial majority of respondents describe themselves as "very interested" or "interested" in overseas culture, while this is also a popular subject of discussion on Chinese social media networks. Interest in overseas culture was high at all ages, but those in their late 20s were the most likely to express interest while people aged 40+ were the least interested overall.

Since that time, Chinese people's overall level of interest in overseas culture seems to have grown. Roughly 80 per cent of survey respondents in both late 2019 and early 2021 described themselves as interested or very interested, a significant increase from the 69 per cent who said the same thing in 2016. There was a particularly large increase in the percentage of respondents describing themselves as "very interested" in overseas culture, which rose from 26 per cent in 2016 to 41 per cent in 2019 and 42 per cent in 2021.

Figure 3.1: Interest in overseas culture (2016, 2019 and 2021)



Question: "Overall, how interested are you in overseas culture?"

Base: All respondents (2016: 4,896 respondents; 2019: 5,200 respondents; 2021: 6,500 respondents)

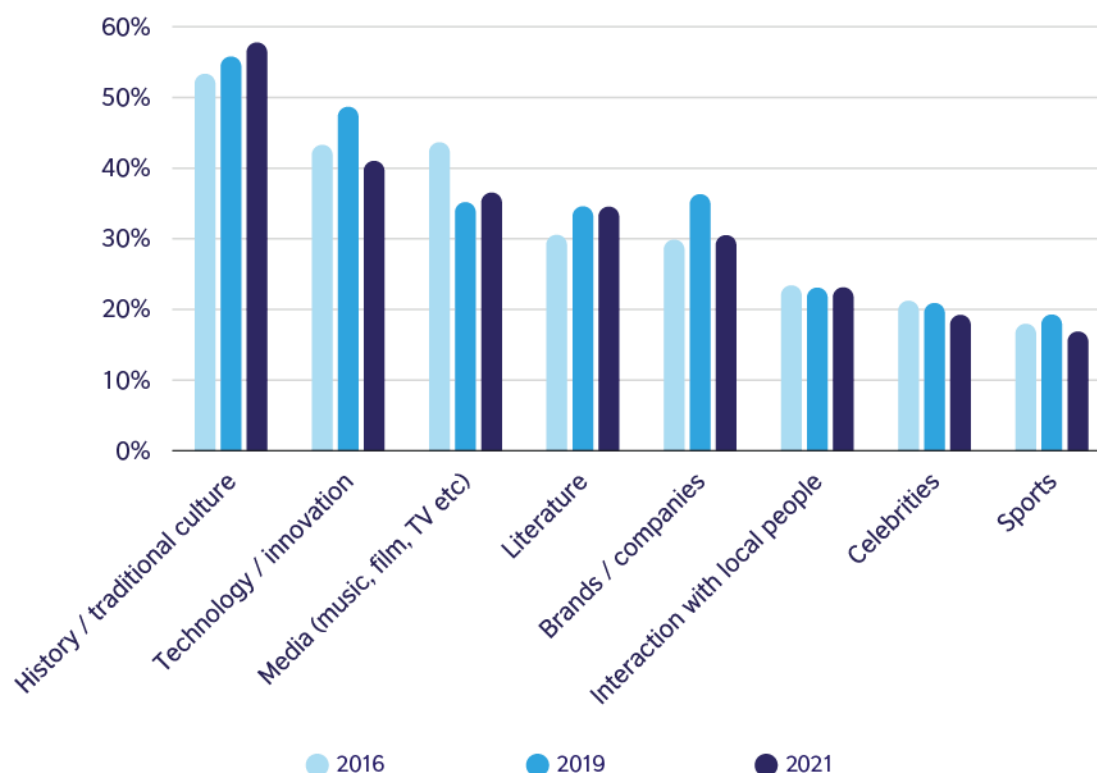
The 2021 survey also asked specifically about changes in attitudes since the beginning of the COVID-19 pandemic period. As may be expected from the very similar proportions of respondents expressing interest in 2019 and 2021, Chinese people generally did not say that their interest in overseas culture had been affected by the pandemic. Overall, only 21 per cent of respondents reported that they had become "much less interested" or "somewhat less interested" in overseas culture over this

period – a smaller proportion than the 34 per cent who said they had become much or somewhat more interested compared to a year ago. Even among the group that said their interest had decreased, a large majority chose the “somewhat less interested” option.

Focus group discussions confirmed that, at least among young Chinese people, overall interest in the culture of overseas countries has as a whole changed little due to COVID or other recent events. However, they did discuss changes in attitudes towards certain overseas countries as described in Section 3.3.

When asked about the aspects of overseas culture they found most interesting, the overall most attractive area was “history and traditional culture”, chosen by 58 per cent of all Chinese respondents. This was followed by technology and innovation, media (including music, films and TV), and literature. Among the areas listed, sports was the factor listed by the least respondents, with only 17 per cent naming it in their top three areas of interest.

Figure 3.2: Interest in aspects of overseas culture (2016, 2019 and 2021)



Question: “Which aspects of overseas culture are you most interested in? (Choose up to three aspects)”
 Base: All respondents (2016: 4,896 respondents; 2019: 5,200 respondents; 2021: 6,500 respondents)

As the chart above shows, the overall pattern has changed relatively little over the last five years. Compared to the results of the 2016 survey, Chinese people express a slightly higher level of interest in history and traditional culture and are somewhat less likely to say that they are interested in overseas media, but the broad ranking of the different factors is roughly the same as it was five years ago.

Speaking to young Chinese people in focus groups confirms the survey findings. Almost all the young people we spoke to expressed an interest in overseas culture, with many saying they were interested in overseas media, overseas literature and overseas history.

One area not covered in depth in the survey is the way of life in overseas countries. There was a strong perception that overseas countries, particularly anglophone and European countries, had a more relaxed, less stressful lifestyle and a greater degree of freedom. “Freedom” in this case was usually not defined in political terms, although some did comment that overseas films and TV shows benefited from fewer restrictions. Instead, it was usually seen in terms of relaxed social expectations, with Chinese students believing that the UK and other overseas countries gave young people more independence and room to pursue their own goals and interests.

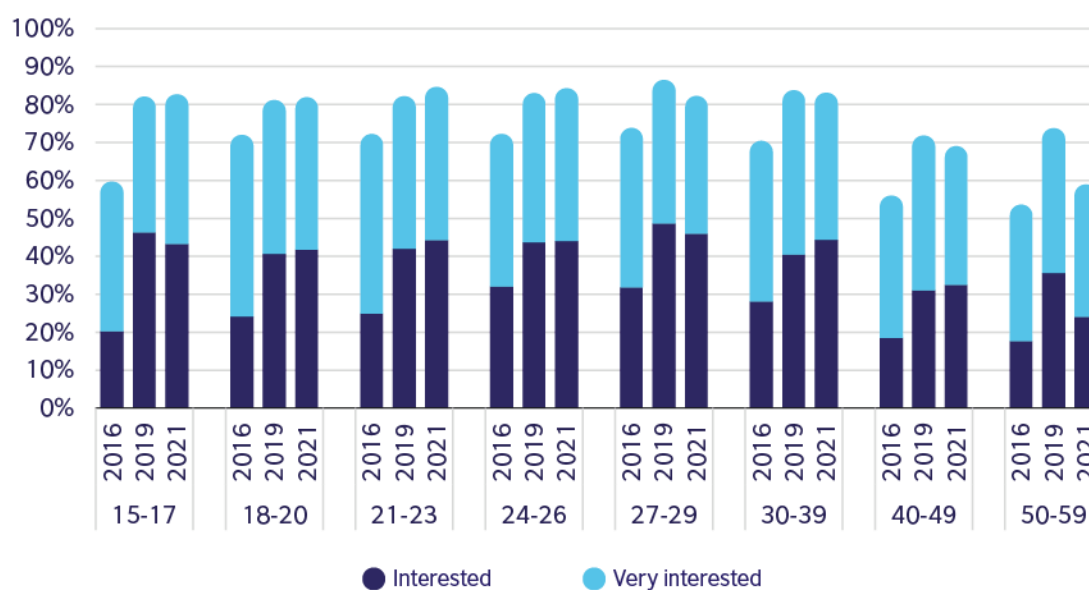
These findings are also supported by an analysis of posts on Chinese social media networks. Users of popular services such as Twitter-like microblog platform Weibo and popular Q&A platform Zhihu made more than 9 million posts discussing the target Anglophone, European and Asian countries over a 12-month period from late 2018 to late 2019. Many of these posts discussed culture-related topics, with almost a quarter of UK-related posts mentioning topics related to brands, celebrities, media, sports or literature, while an even larger proportion were linked to education.

3.2 Factors affecting interest in overseas culture

A closer look at the survey results shows that demographic factors cause self-reported interest in overseas culture to vary significantly. Age, student status, city of residence and income all have a strong effect on how likely a person is to say that they are interested in overseas culture.

The pattern by age group is similar to that seen in previous research: Groups from teenagers to people in their 30s express high levels of interest, while those above the age of 40 are more lukewarm – although even among the oldest group of respondents, a majority still said that they were at least “interested” in overseas culture.

In the 2021 survey, the 50-59 age group were the least likely to say they were interested in overseas culture at 59 per cent. All under-40 age groups were meanwhile statistically indistinguishable with between 82 and 85 per cent of respondents expressing interest. There was an increase in the proportion of respondents across all age groups that reported being interested in overseas culture, between 2016 and 2019, but no major differences in most age groups between the 2019 and 2021 survey results.

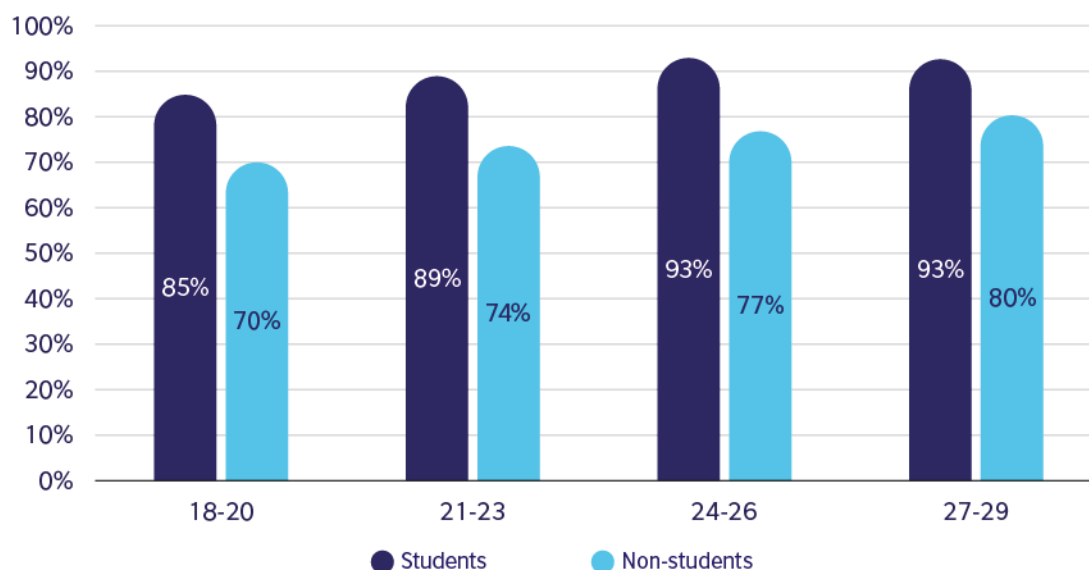
Figure 3.3: Interest in overseas culture by age group (2016, 2019 and 2021)

Question: "Overall, how interested are you in overseas culture?" ("Interested" and "Very interested")
 Base: All respondents (2016: 4,896 respondents; 2019: 5,200 respondents; 2021: 6,500 respondents)

Compared to overall level of interest in overseas culture, there was more variation by age group in interest in the various aspects of overseas culture. Interest in overseas media was highest among young people in their late teens to mid 20s, while the proportion expressing interest in overseas celebrities was highest among 18–20-year-olds. In contrast, younger respondents were much less likely to say they were interested in technology and innovation than those aged 27 and up, while interest in overseas history and traditional culture also increased with age.

As with the research findings in 2016, the apparently similar levels of interest across each age group was partly an artefact of some substantial differences between students and non-students. Within each age group, current students were substantially more likely to be interested in overseas culture than people who were no longer in education. But at the same time, as both students and non-students progress further into their 20s, both groups become more likely to describe themselves as interested in overseas culture than their younger counterparts. The progressively lower proportion of students in each group explains why the overall level of interest remains constant.³

³ Data is not given for respondents aged under 18 or 30+, due to very low numbers of non-student and student respondents in these age groups respectively.

Figure 3.4: Interest in overseas culture by age group and student status (2021)

Question: "Overall, how interested are you in overseas culture?" (Sum of "Interested" and "Very interested")
 Base: Respondents aged 18-29 (4,132 respondents)

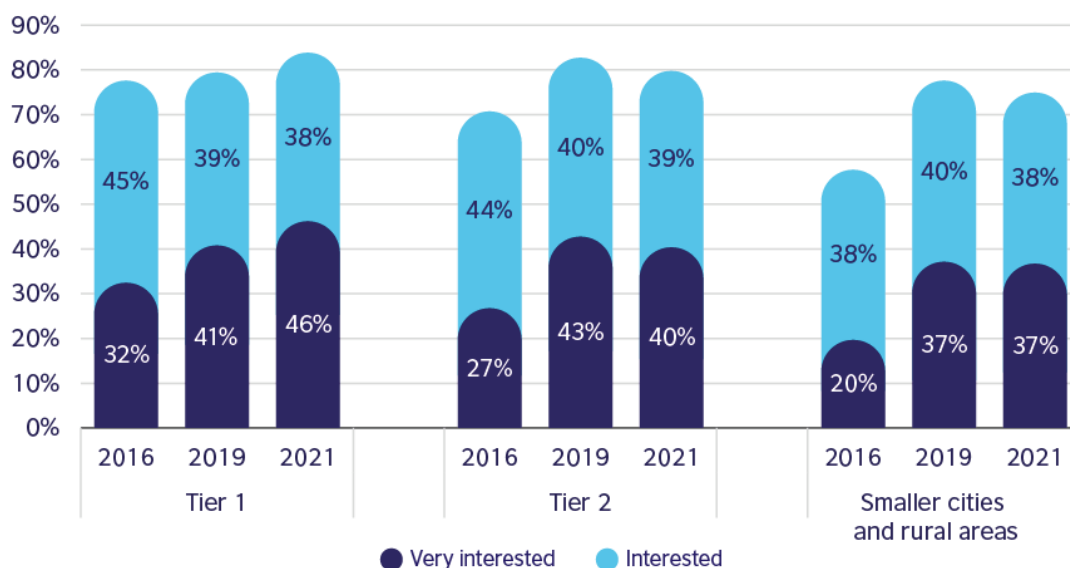
Breaking the survey findings down by region shows that the main regional divide in China is not between the different geographical parts of the country but between larger and smaller cities. After dividing respondents by city tier⁴ there were no consistent and significant differences between the proportion of respondents describing themselves as interested in overseas culture in similarly-sized cities in, for example, North vs South China.

The 2021 survey results show that the proportion of Chinese people in the largest (Tier 1) cities expressing interest in overseas culture was noticeably higher than in less developed areas of the country, with 84 per cent of Tier 1 city residents describing themselves as interested or very interested compared to 80 per cent in Tier 2 cities and 75 per cent in Tier 3+ cities.

This broad trend – higher interest in larger cities – is in line with the findings from earlier research. However, the difference was far smaller in 2021 compared to 2016. The 18-percentage point difference in self-reported interest in overseas culture between Tier 1 and Tier 3+ cities in the older survey was twice the size of the gap seen in 2021. Although there has been a moderate increase in interest in overseas culture even in China's largest cities, the bulk of the overall rise has been due to changes in China's smaller cities, which in recent years have seen a faster pace of development than their larger counterparts.

⁴ City-level administrative regions in China are commonly divided into Tier 1 (Beijing, Shanghai, Guangzhou and Shenzhen), Tier 2 (provincial capitals and other similarly-developed cities) and Tier 3+ (smaller cities and less-developed areas).

Figure 3.5: Interest in overseas culture by city tier (2016, 2019 and 2021)

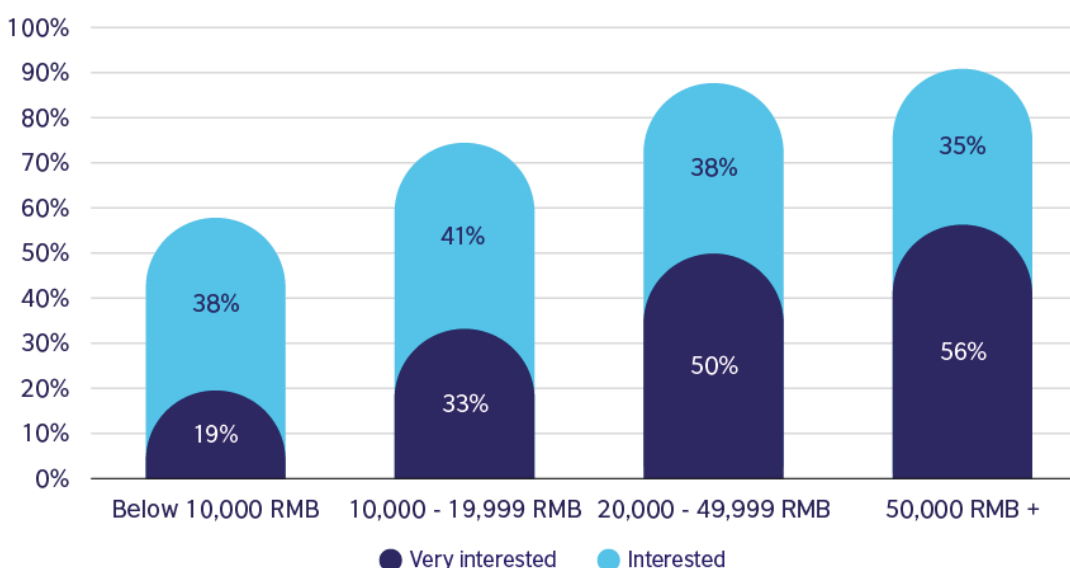


Question: “Overall, how interested are you in overseas culture?”

Base: All respondents (6,500 respondents)

A final factor affecting how likely surveyed Chinese people were to express interest in overseas culture was household income. Fewer than 60 per cent of respondents who said they had total monthly household incomes below RMB 10,000 (around £1,100) expressed interest in overseas culture, while in the richest group – those that reported household incomes over RMB 50,000 (£5,500) per month – more than 90 per cent said they found overseas culture interesting. Compared to the overall change in interest in 2021 vs 2016, the change at each individual income level was comparatively small, showing that the increasing wealth of Chinese households is a major contributor to the overall increase in interest in overseas culture.

Figure 3.6: Interest in overseas culture by household income (2021)



Question: “Overall, how interested are you in overseas culture?”

Base: Respondents who specified their household income (6,455 respondents)

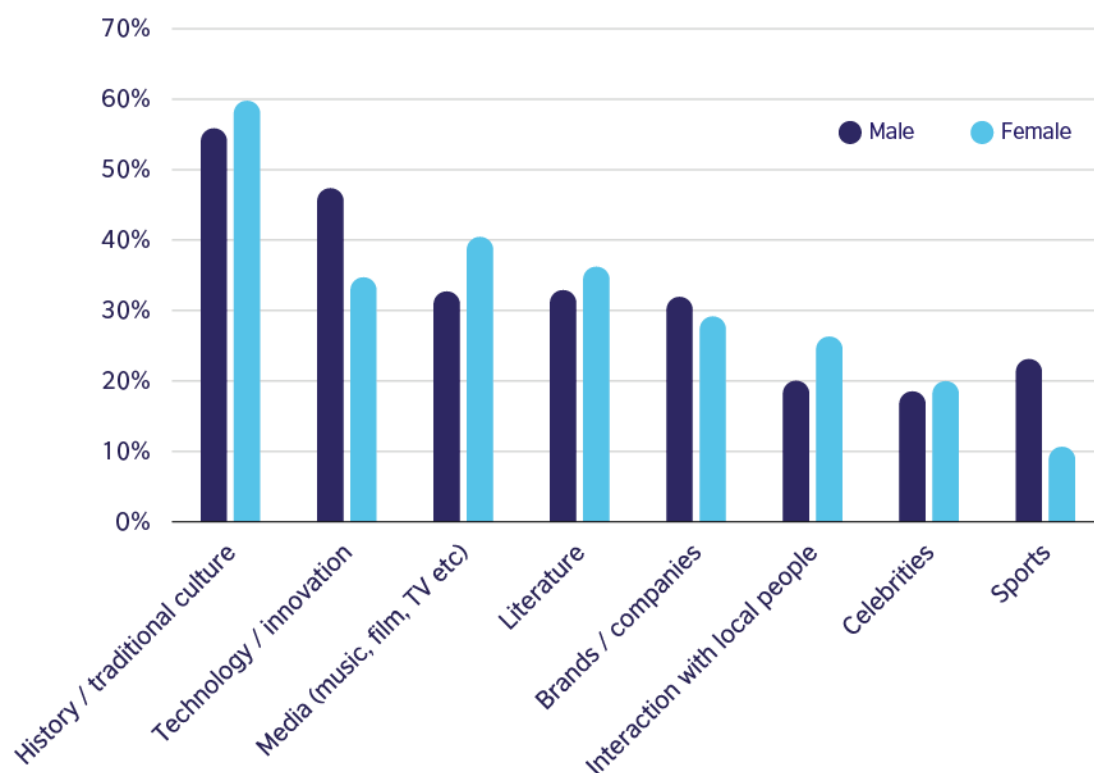
Breaking cultural interest down by level of wealth shows some substantial differences in the different aspects of overseas culture that different people find attractive. After accounting for overall level of cultural interest, respondents in less-wealthy groups were far more likely to say that overseas media such as music or films was among their main overseas cultural interests, while interest in brands / companies and literature was comparatively more common among wealthier respondents.

One important caveat when discussing income levels is that the income distribution of survey respondents does not closely match the overall income distribution across China. A household income of RMB 10,000 per month, the boundary of the lowest category in the chart above, is still above the overall national average reported by China's National Bureau of Statistics.⁵ Data from Euromonitor suggests that only 45 per cent of households in China had total disposable income over US\$15,000 per year (around RMB 8,000 per month), while more than 90 per cent of survey respondents reported household incomes over RMB 10,000 per month. Almost 12 per cent of survey respondents claimed that their household income was above RMB 50,000 per month, almost 10 times the overall national proportion of households in this income band according to data from Euromonitor.

To some extent this is because the survey attracted a disproportionately wealthy and more urban group of respondents, but some respondents may also have exaggerated their level of wealth. Nevertheless, the results are clear that wealthier groups tend to be much more interested in overseas culture.

Finally, gender had little overall effect on the overall level of interest in any of the three research phases – among respondents to the 2021 survey, the proportion of respondents saying that they were “interested” or “very interested” in overseas culture was 80 per cent in both genders. But looking deeper into what male and female respondents actually found interesting revealed some notable differences – male respondents were more than twice as likely to express an interest in overseas sports and also substantially more likely to name technology and innovation among their top interests when it came to overseas culture, while female respondents were more likely to mention media, interaction with local people, and history or traditional culture.

⁵ According to the National Statistics Bureau the average per-capita disposable income in 2019 was RMB 30,732 per year while the average household size was 2.92 people, corresponding to an average monthly household income of around RMB 7,500. In urban parts of China the average per-capita disposable income was somewhat higher at RMB 42,359, which would correspond to around RMB 10,300 per month at the household level if the household size was constant.

Figure 3.7: Interest in aspects of overseas culture by gender (2021)

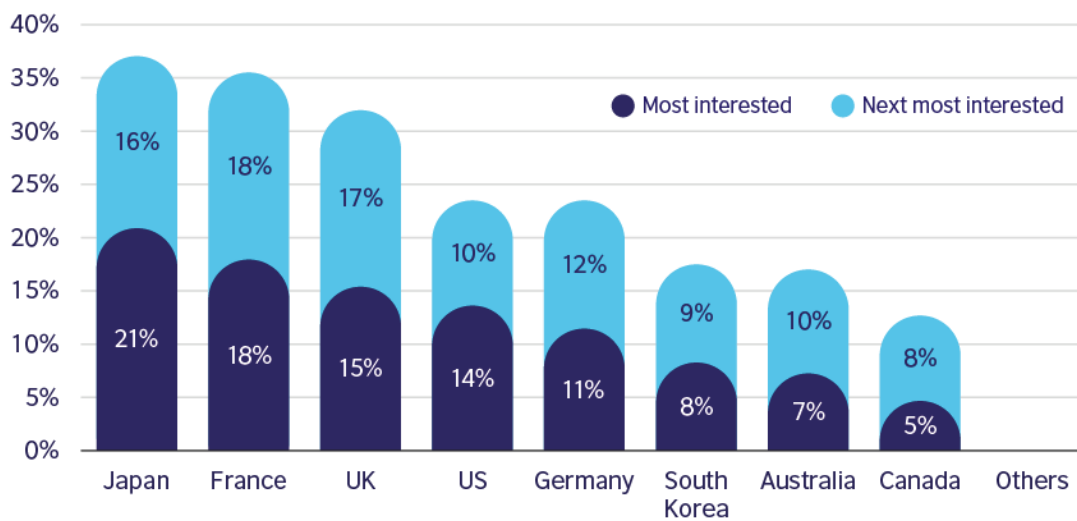
Question: "Which aspects of overseas culture are you most interested in? (Choose up to three aspects)"

Base: All respondents (6,500 respondents)

3.3 Interest in specific overseas countries

When asked to name their preferred overseas country in terms of culture, survey results in 2021 were sharply different to those from the 2016 survey round.

Five years ago, more than 28 per cent of Chinese survey respondents said that the US was their favourite overseas country, and a further 18 per cent said that it was their second-most preferred, putting the US far ahead of any other overseas country. However, in the most recent survey round the proportion naming the US as their top country has dropped by more than half since 2016, pushing it down to 4th place overall behind Japan, France and the UK.

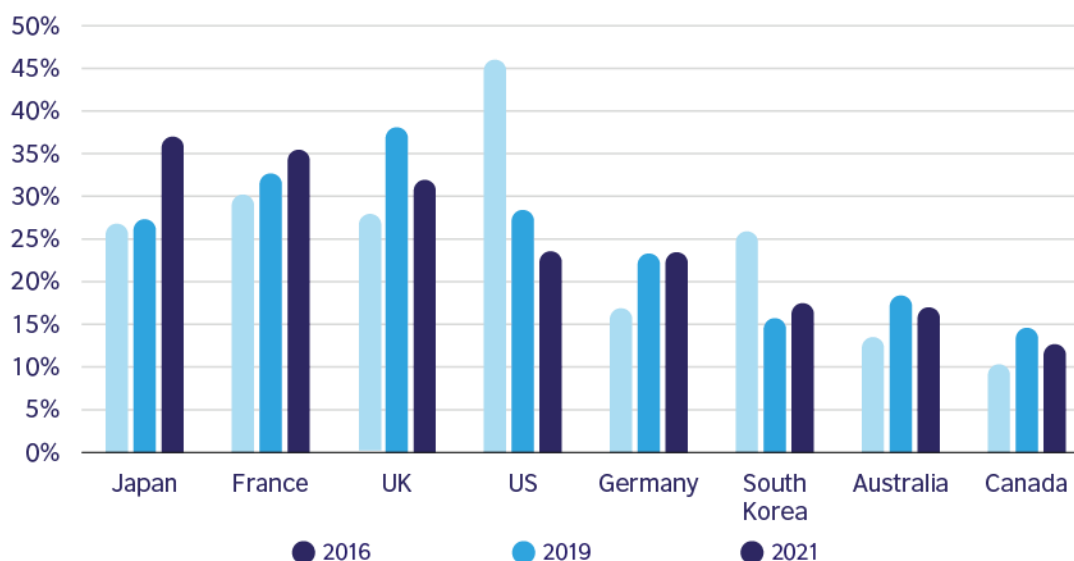
Figure 3.8: Countries whose culture respondents find most interesting (2021)

Questions: “Which overseas country’s popular culture do you most prefer?”; “Aside from the country you mentioned in the previous question, which overseas country’s popular culture do you most prefer?”

Base: All respondents who were interested or very interested in overseas culture (5,220 respondents)

Looking at trends over time, the decrease in people describing the US as their preferred overseas country in terms of culture was already very apparent by 2019. Comparing the findings of the 2019 survey to those in 2016, the number of people describing the US as the country whose culture they were most or next-most interested in had fallen from 46 to 28 per cent. South Korea also saw a substantial drop while the UK was the biggest beneficiary, particularly in the “most interested” category where the proportion of people who chose the UK almost doubled.

However, 2021 saw a different trend, with the proportion of people choosing the UK dropping back substantially, although it remained above its position in 2016. The US and other Anglophone countries also saw a further drop in stated interest, with Japan and France seeing the largest benefit.

Figure 3.9: Countries whose culture respondents find most interesting (2016, 2019 and 2021)

Questions: “Which overseas country’s popular culture do you most prefer?”; “Aside from the country you mentioned in the previous question, which overseas country’s popular culture do you most prefer?” (Sum of 1st and 2nd choice answers)

Base: All respondents who were interested or very interested in overseas culture (2016: 3,380 respondents; 2019: 4,199 respondents; 2021: 5,220 respondents)

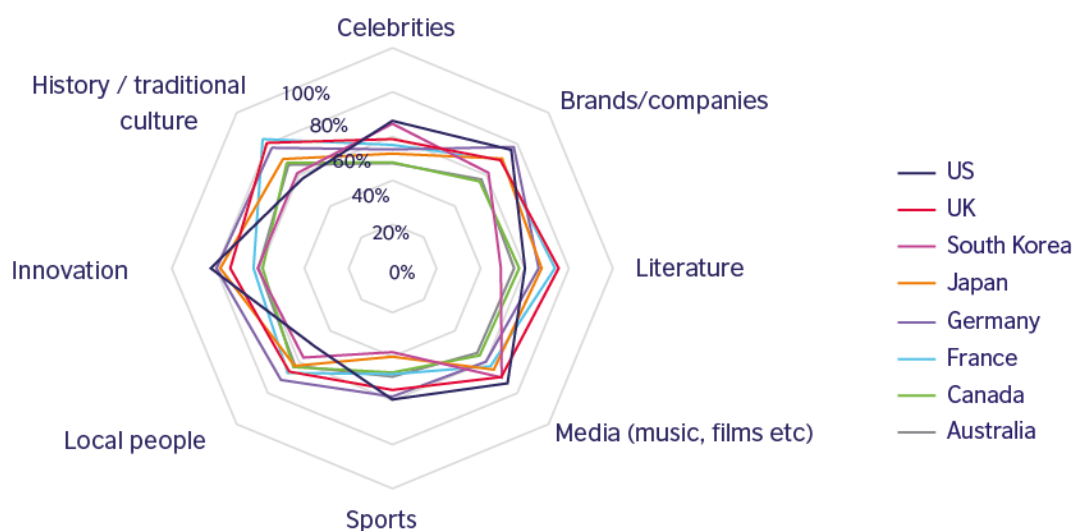
The most obvious cause of this appears to be changes in the international situation. Political tensions between China and the US have greatly increased since 2016, with an escalating trade war between the two countries and escalated rhetoric on both sides. Meanwhile Korea had its own disputes with China between the first and second survey rounds, with Chinese authorities restricting the import of Korean music and TV programmes due to Korea’s deployment of the American THAAD missile defence system. More recently, the US – China situation remains tense despite the election of a new US president, while disputes including that over Hong Kong have affected attitudes towards the UK. China-Australia relations have also worsened over the last two years, partly due to the country’s push for an independent inquiry into the origins of COVID-19.

However, answers to the question on preferred overseas culture may overstate the extent to which Chinese people’s attention has shifted away from the US. Responses to other questions on the survey show that proportion of people describing countries as attractive or very attractive in terms of each different aspect of overseas culture has shifted comparatively little compared to their comments about overall interest in a country. Similarly, focus group discussions with Chinese young people suggest that there has been less change than answers to the question on most-preferred countries may imply.

Overall, the US was rated as the most attractive country across four of the eight aspects of culture that we asked about – celebrities, media, sports and innovation. Germany took the top spot in terms of brands / companies and friendliness of local people, while the UK led in the field of literature. The UK also rated highly for history and traditional

culture, although a slightly higher proportion of respondents said that France was attractive in this area.

Figure 3.10: Attitudes towards aspects of overseas countries' culture (2021)

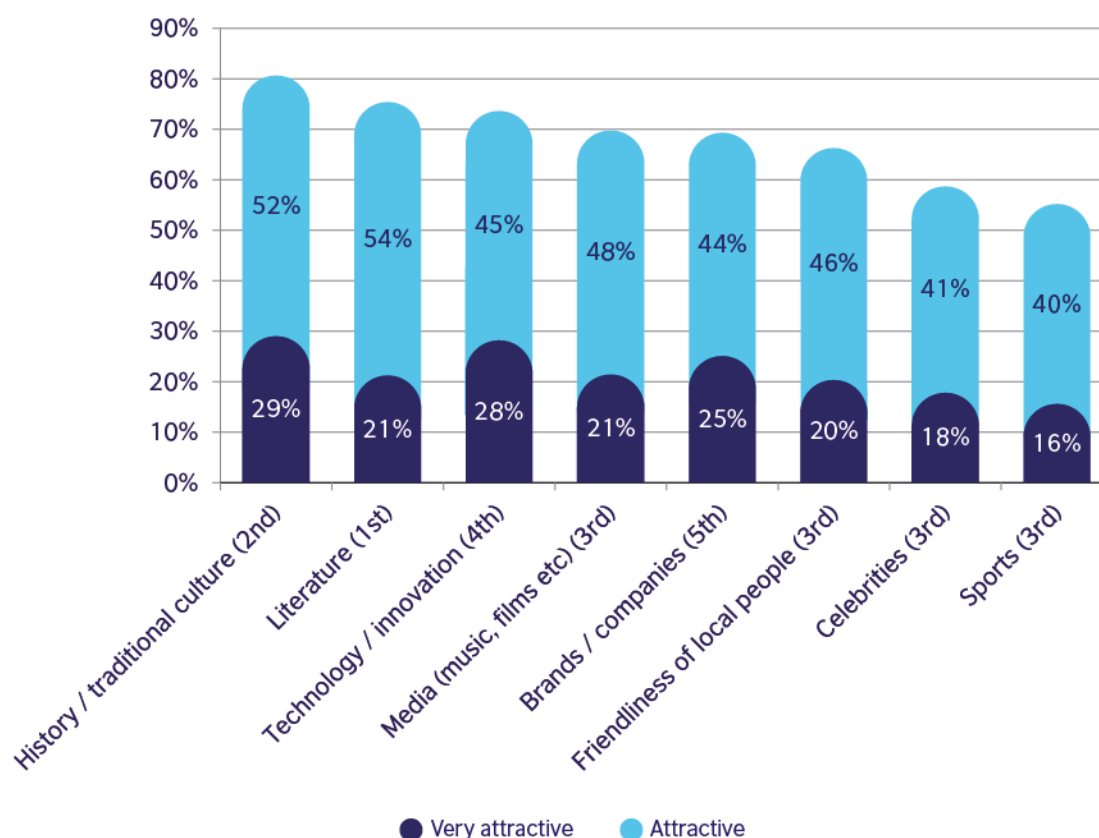


Question: Thinking about [Country's] culture, how attractive do you find each of these aspects? (% saying Attractive or Very Attractive)

Base: All respondents (6,500 respondents)

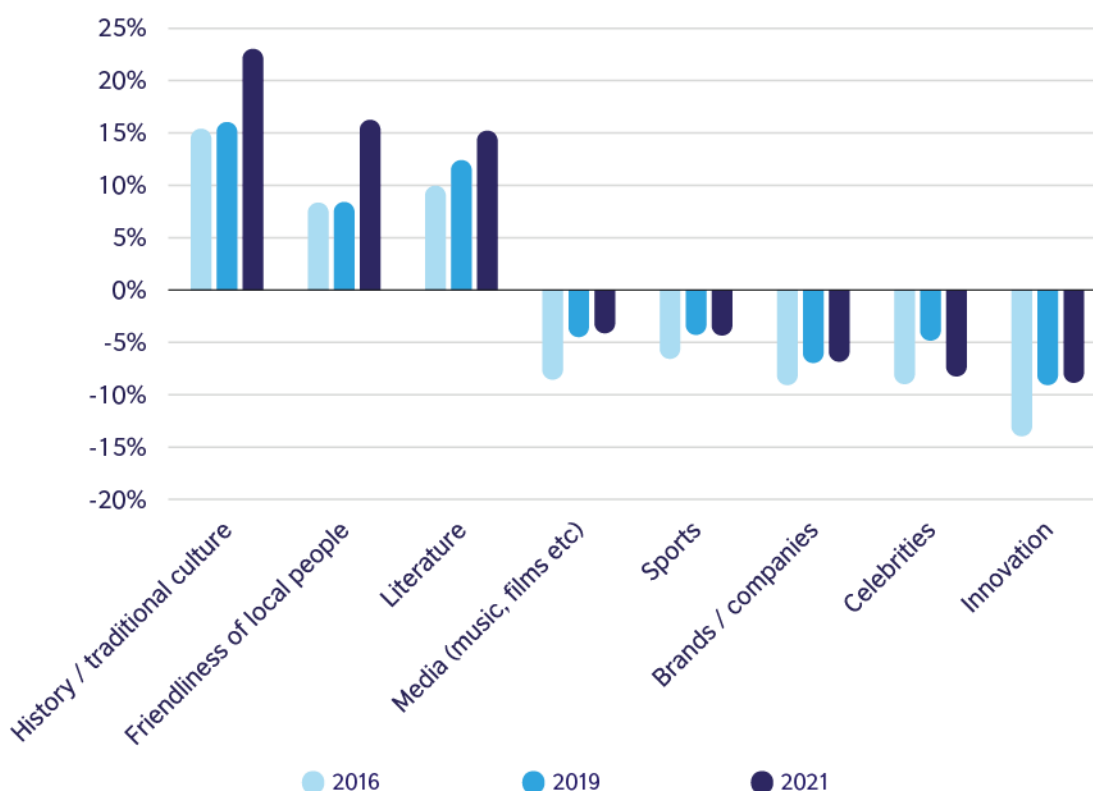
Looking at the UK specifically, the aspect where the country was seen as most attractive overall was history / traditional culture, where 81 per cent of respondents described the country as attractive or very attractive – up from 74 per cent in 2016. Meanwhile the UK was rated as the leading country internationally in terms of literature, with three quarters of respondents describing the country as attractive or very attractive in this area. The UK has a significant advantage over other Anglophone countries in this field, with only 60 per cent of people rating the US as attractive and lower proportions choosing Australia and Canada, and this advantage has become more pronounced since the 2016 and 2019 surveys.

Figure 3.11: Attitudes towards aspects of UK culture (2021)



Question: Thinking about UK culture, how attractive do you find each of these aspects?
 Base: All respondents (6,500 respondents)

A direct comparison of the attractiveness of the UK and the US across each factor shows that, in sharp contrast to the overall shift in preferred culture, the relative gap between the two countries on each individual factor stayed relatively consistent – the UK was still seen as more attractive in terms of history / traditional culture, the friendliness of local people, and literature, while the US continued to be rated more highly in all other areas including media, sports, brands, celebrities and innovation. While the UK did gain slightly over the US in some areas, this difference was far smaller than the shift in overall preference, suggesting that there is something of a disconnect between top-of-mind preferences and deep-seated cultural interest.

Figure 3.12: Net gaps in perceptions of aspects of UK vs US culture (2016, 2019 and 2021)

Question: "Thinking about UK culture, how attractive do you find each of these aspects?"; "Thinking about US culture, how attractive do you find each of these aspects?" (Gaps in proportion of respondents choosing Attractive / Very Attractive for the two countries)

Base: All respondents (6,500 respondents)

The US continued to be rated as more attractive than any other overseas country in terms of innovation, media, sports and celebrities, while coming a close second behind Germany in terms of brands. Germany was also the country most likely to be rated as attractive or very attractive for the friendliness of local people, while France scored slightly above the UK in terms of history and traditional culture.

Compared to other countries, the UK lost ground to most other competitors in relative terms between 2016 and 2021, particularly to Japan and to a lesser extent Korea. While the UK continued to be ranked as the most attractive country in terms of literature the country's advantage over competitors narrowed substantially in this field, while the UK also dropped to 4th place below Japan in terms of innovation and to 3rd place slightly below Korea in terms of the attractiveness of media (music, film and related areas).

One particularly noticeable change in 2021 compared to the 2019 survey was in the perceived friendliness of local people. All anglophone countries saw a drop in the number of people giving positive answers in this area, but there were particularly large drops in ratings of the US and Australia compared to before the COVID-19 pandemic. This is likely due to a combination of international tensions and widely publicised media reports of anti-Chinese sentiment in these countries.

Compared to their statements when asked to choose a single preferred country, Chinese people's expressions of interest in particular aspects of overseas culture may be less affected by short-term political trends, and therefore give a better long-term indicator of how this will affect perceptions of education in that country.

3.4 Factors affecting interest in different countries

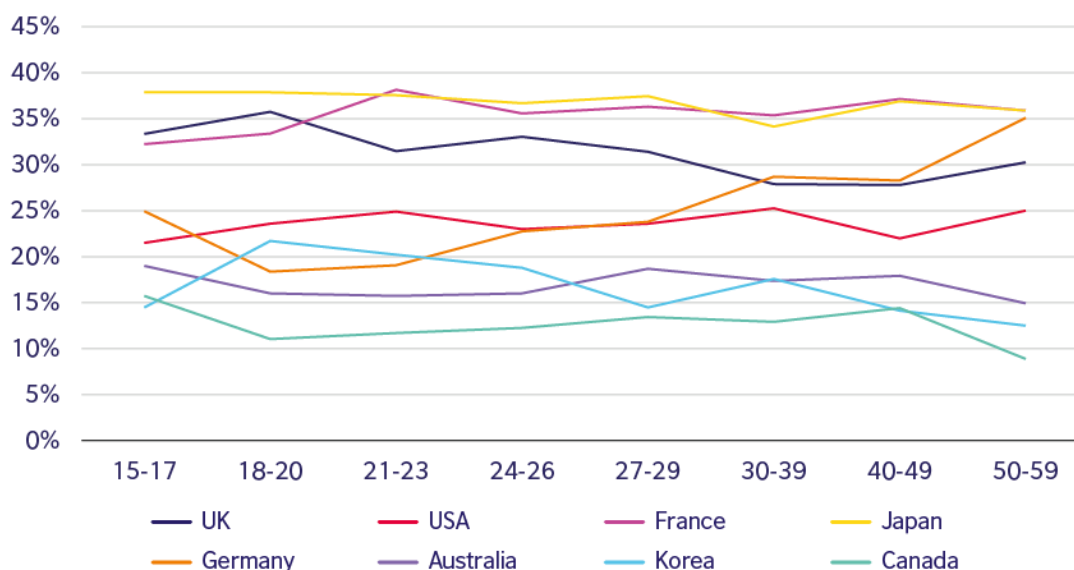
As with overall cultural interest, there are major differences in the countries that different groups of respondents find attractive. One measure that greatly affects these preferences is age, with Korea, Japan and the UK generally more attractive among younger age groups while Germany and to a lesser extent France were more likely to be chosen by older people.

Looking at the attractiveness of different aspects of UK culture, UK media such as films, music and TV are relatively more attractive to younger people compared to their older counterparts. UK brands are also more likely to be rated as attractive by younger age groups, while there was little noticeable difference in different groups' assessment of other aspects of UK culture after controlling for the proportion of people in each age group who were interested in that aspect.

In the case of Japan, younger people were particularly more likely to choose the country as their overall favourite overseas country in terms of culture, while this effect was less apparent when combining both first and second-choice preferences. The opposite is true of the UK, where the proportion of people seeing the country as their overall favourite overseas culture was relatively constant across age groups but younger people were more likely to rate it as their second-favourite country.

Meanwhile the pattern for Korea has seen some major changes since the 2016 survey. In that year, respondents in the 15 to 17 age group showed the strongest affinity for Korea, with it ranking as the second most popular choice, behind the US. In contrast, the 2019 and 2021 surveys showed that Korean culture is substantially less attractive among this group than among older teens and young people in their early 20s. This may have been influenced by a ban on Korean content on Chinese television from late 2016 in response to Korea deploying the US THAAD missile defence system. The popularity of Korean culture has declined among all age groups, but the particularly large effect on 15–17-year-olds may be due to this group having less exposure to Korean culture in their early teenage years.

Figure 3.13: Countries whose culture respondents find most interesting, by age group (2021)

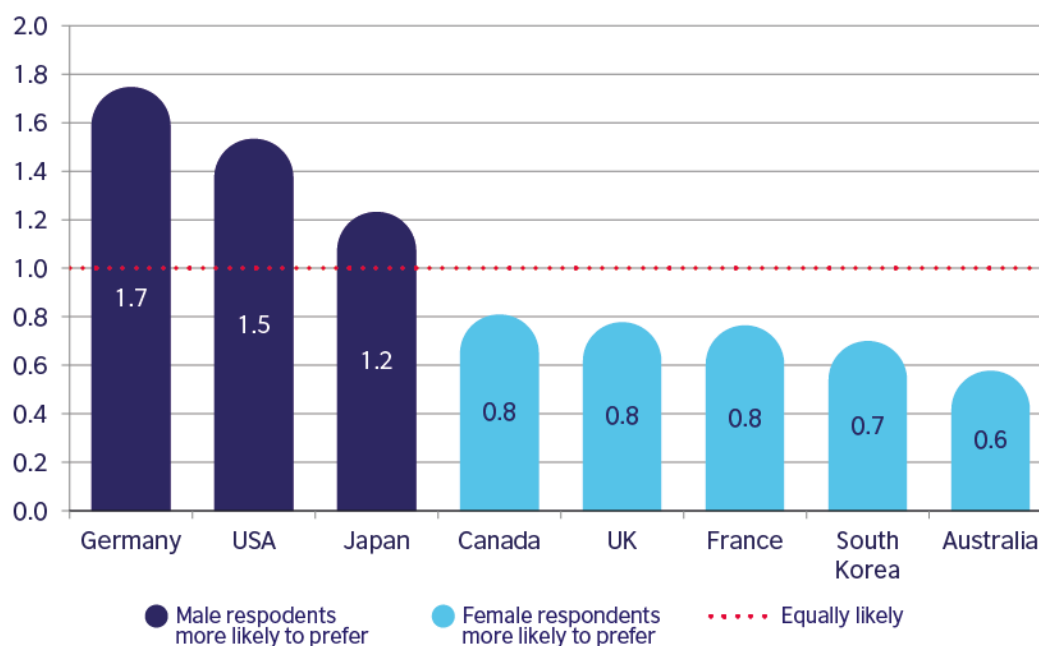


Question: "Which overseas country's popular culture do you most prefer?"; "Aside from the country you mentioned in the previous question, which overseas country's popular culture do you most prefer?" (Sum of 1st and 2nd choice answers)

Base: All respondents who were interested or very interested in overseas culture (5,220 respondents)

There are also clear gender differences between the people who say they are interested in the culture of particular countries. As in 2016, the people who said they are more attracted to UK culture are disproportionately likely to be female, with 17 per cent of female respondents naming the UK as their preferred overseas country in terms of culture compared to only 13 per cent of males. The opposite is true of the US, with male respondents more than half again as likely to say that this is their preferred overseas country in terms of culture compared to female respondents. Germany is particularly strongly preferred by male respondents, while Australia, South Korea and France are all more popular among females.

Figure 3.14: Gender differences in countries whose culture respondents find most interesting (2021)



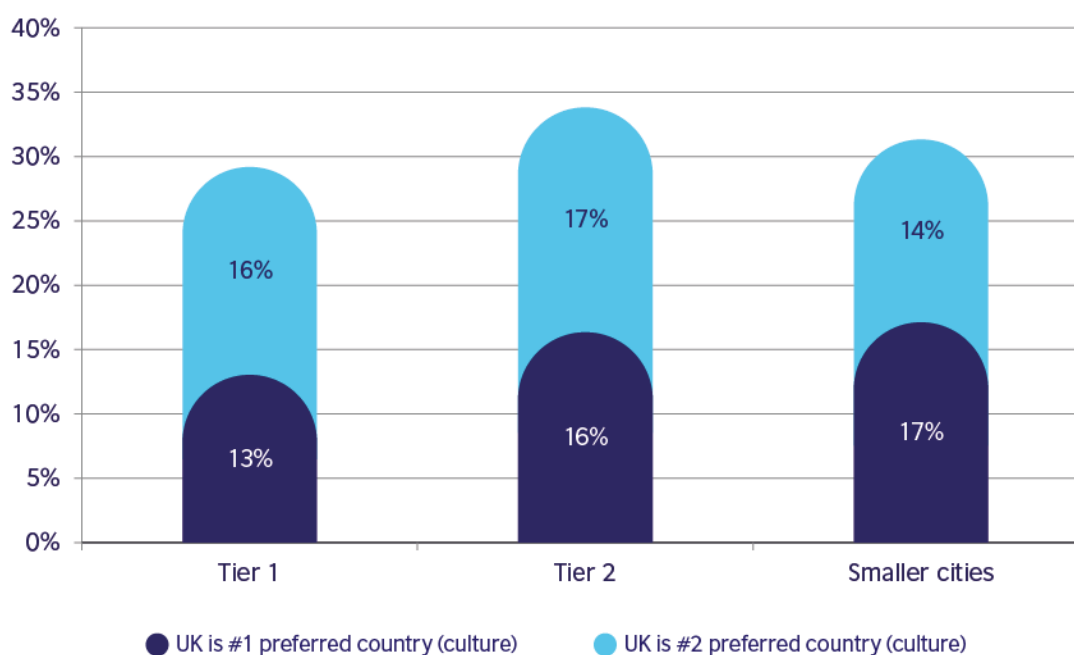
Question: "Which overseas country's popular culture do you most prefer?"

Base: All respondents who were interested or very interested in overseas culture (5,220 respondents)

In contrast to 2016, the proportion of male respondents preferring the US has seen a sharper drop than among female respondents – although both genders are substantially less likely to name the country as their favourite than they were five years ago. Meanwhile Korea has seen a greater decline among female respondents.

Geography was a factor which showed a noticeably different trend in 2021 compared to 2016. While five years ago people in China's largest Tier 1 cities were slightly more likely to name the UK as their preferred overseas country in terms of culture, the opposite is now true, with those in Tier 2 cities and smaller cities / rural areas more likely to say that the UK was their favourite overseas country in terms of culture. Compared to five years ago the proportion of Tier 1 residents saying that they preferred the UK has changed relatively little, but there has been a great increase in people from smaller cities saying that they are attracted to UK culture.

Looking more closely at attitudes towards different aspects of the UK's culture, after restricting the sample to people who said they were interested in a particular aspect of culture there were no statistically significant differences between people from different cities in terms of the proportion who described the UK as attractive in this area.

Figure 3.15: Preference for UK culture by city tier (2021)

Questions: “Which overseas country’s popular culture do you most prefer?”; “Aside from the country you mentioned in the previous question, which overseas country’s popular culture do you most prefer?”

Base: All respondents who were interested or very interested in overseas culture (5,220 respondents)

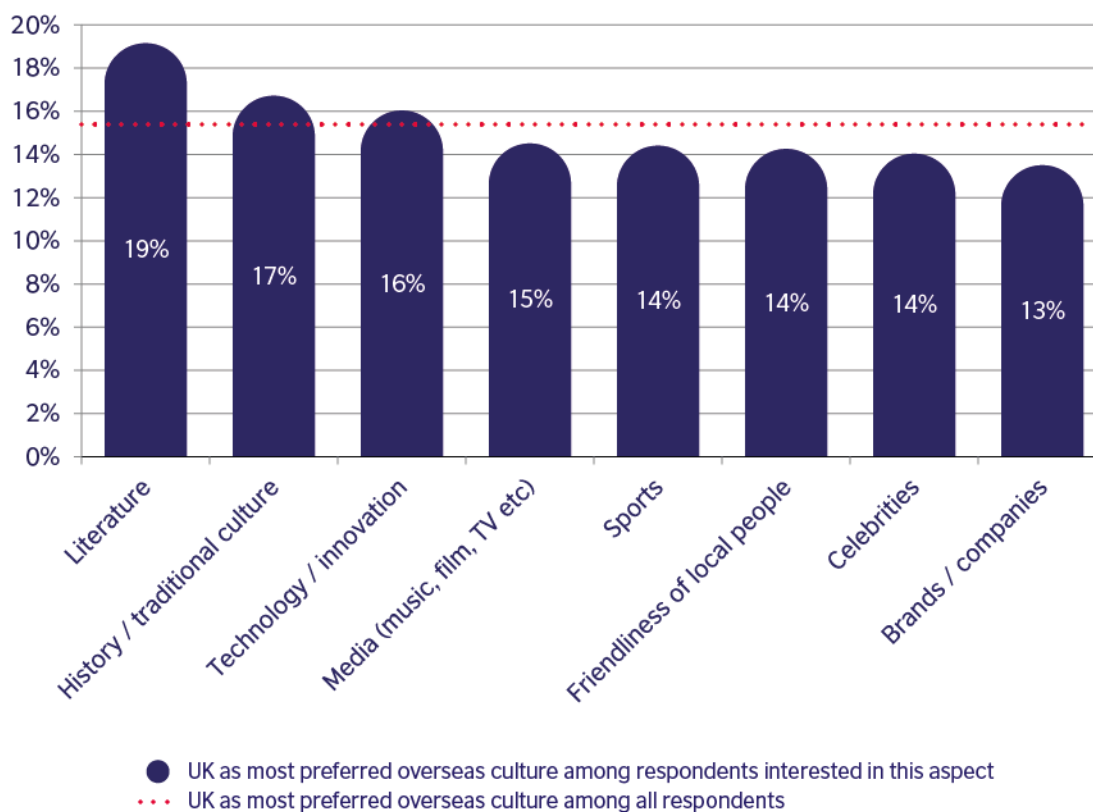
However, wealthier people are still generally more likely to regard the UK as more attractive, with a little over 17 per cent of the wealthiest group of respondents saying that they saw the UK as the most attractive overseas culture compared to only around one in eight respondents who said that their household income was below RMB 10,000 per month. Meanwhile interest in Korean culture showed the opposite trend, with the country being more popular among less-wealthy groups. Wealthier respondents tended to be more likely to rate the UK highly across a range of different cultural aspects including media, innovation, history / traditional culture and the friendliness of local people.

Another important factor affecting country preferences is the type of overseas culture a person is interested in. As in 2016, people with a greater level of interest in the areas where the UK is seen as strong, such as literature or history / traditional culture, were more likely to say that the UK was their preferred overseas culture. Similarly, people who are more interested in areas where the UK is seen as comparatively weak, like celebrities or brands, tend to have a lower level of interest in the UK. The overall pattern is similar to that seen five years ago, with the main changes linked to changes in attractiveness of the various aspects of UK culture.

Preference for other countries also follows a similar pattern. For example, surveys showed that Japan is seen as attractive when it comes to media, with focus group discussions showing that Chinese young people see Japanese animation as particularly attractive – so it is unsurprising that people with an interest in that aspect of overseas culture are more likely to prefer the country, while those who care more about sports are substantially less likely to choose Japan as their preferred country overall. The

country with the biggest variation by aspect of culture is Korea. While only 8 per cent of respondents preferred Korea overall, 19 per cent of those said they pay attention to overseas celebrities.

Figure 3.16: Respondents preferring UK culture, by interested cultural aspects (2021)

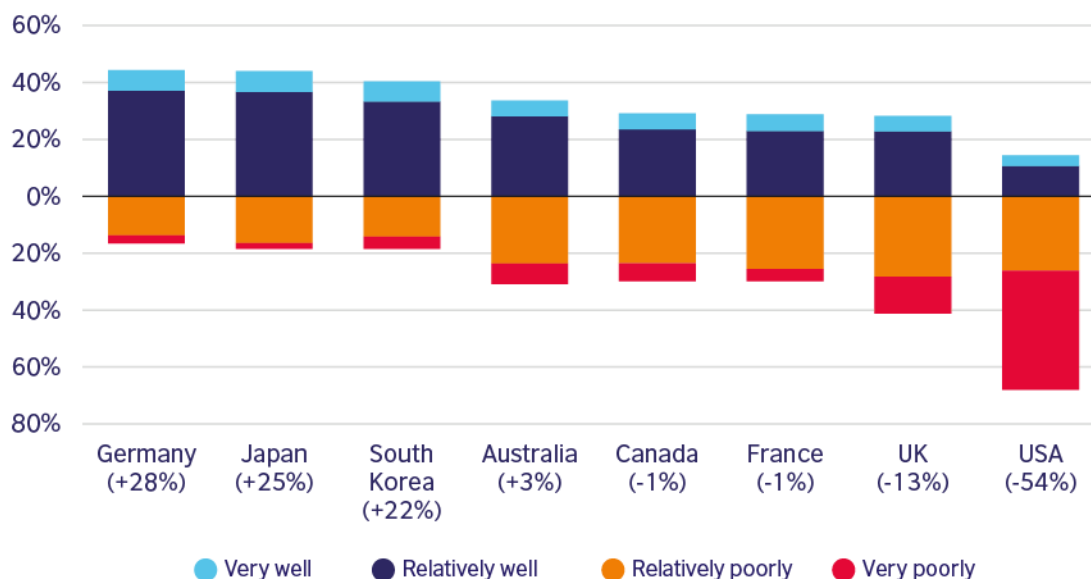


Questions: “Which overseas country’s popular culture do you most prefer?”; “Which aspects of overseas culture are you most interested in? (Please choose up to three aspects)”

Base: All respondents who were interested or very interested in overseas culture (5,220 respondents)

A final factor which may have played a role in changing Chinese attitudes is the COVID-19 pandemic. Chinese survey respondents were asked about their opinions on different countries’ response to the pandemic. The UK’s handling of the crisis was rated poorly compared to most other countries: overall, 28 per cent said the country had performed very well or relatively well, compared to 41 per cent who said the opposite, a gap of negative 13 per cent overall. Only the US was seen as having responded worse, with 68 per cent of survey respondents expressing a negative opinion compared to 14 per cent who had a positive assessment.⁶

⁶ It should be noted that the surveys were carried out before the UK’s vaccination campaign, which may have had a positive effect on Chinese perceptions.

Figure 3.17: Perceptions of overseas countries' response to the COVID-19 pandemic (2021)

Question: How well do you feel the following countries have responded to the COVID-19 pandemic?

Base: All respondents (6,500 respondents)

Note: Students expressing a neutral opinion ("neither well nor poorly") are not shown on the chart above

While there was not a perfect correlation between perceptions how countries responded to COVID-19 and the change in cultural attitudes since before the pandemic, the strongly negative opinions of the US and UK's performance may have influenced the decline in the number of Chinese people rating them as their preferred overseas culture compared to immediately before the pandemic, while the three countries with strongly positive scores overall also saw an increase in Chinese people's self-reported cultural attraction.

The comparatively low rating of Australia's performance, despite its very low COVID-19 death rate, also shows that how Chinese people evaluate the response of specific countries to the pandemic is not entirely related to objective results. Political disagreements between China and Australia have meant that Chinese media has run many negative stories about the country, while difficulties faced by Chinese students who have been unable to return to courses in the Australia have also received widespread attention.

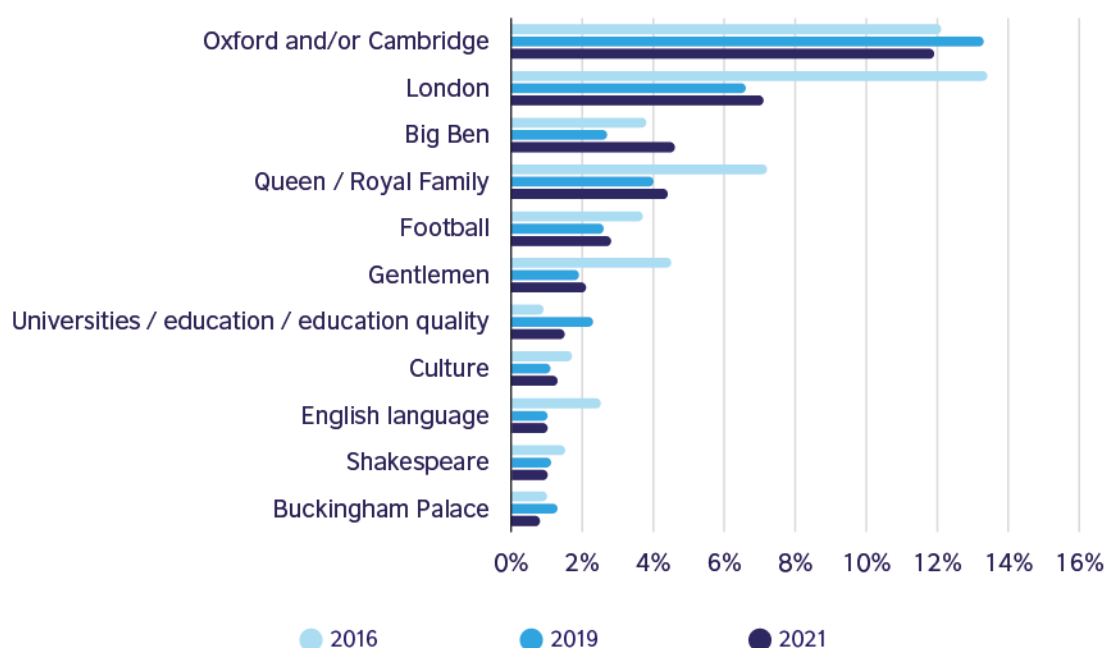
Focus groups with Chinese young people showed that the COVID response has affected overall perceptions of government competence in some countries as well as affecting perceptions of safety and interest in travelling to these countries – although others commented that vaccination programmes would resolve those concerns within the next few months. However, no focus group participants said that this had directly affected their interest in any overseas country's culture.

3.5 Perceptions of the UK and UK people

When survey respondents were asked in 2016 to name the first thing they associated with the UK, the most common single answer was London. In contrast, survey

respondents in 2021 were more likely to mention Oxford and/or Cambridge – often specifically mentioning the universities or naming both cities together, suggesting that they were talking about education rather than the cities themselves. Overall, more than 11 per cent of Chinese survey respondents gave this answer, with other responses related to education or universities also appearing in the list of the top 10 response categories.

Figure 3.18: Keywords associated with the UK by survey respondents (2021)

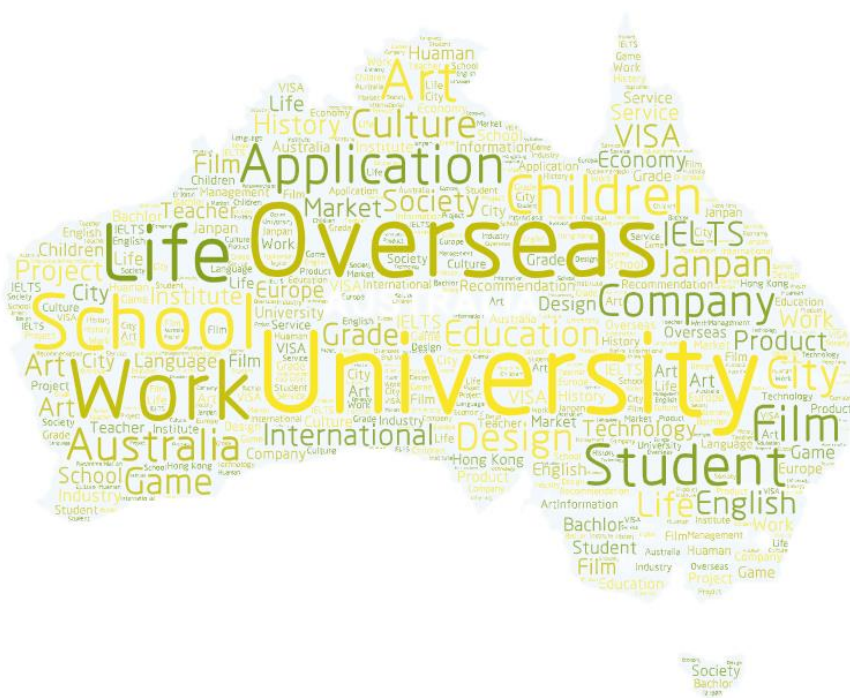


Question: “When the UK is mentioned, what is the first thing you think of?” (Responses classified into broad categories)

Base: All respondents (2016: 4,896 respondents; 2019: 5,200 respondents; 2021: 6,500 respondents)

In comparison to five years earlier, respondents were relatively more likely to give education-related answers, with an increase in broad references to education and universities as well as specific institutions. The proportion of people mentioning science and technology also increased, while there was a drop in references to London, the Royal Family, the stereotype of “British gentlemen”, and Sherlock Holmes.

The centrality of education in many Chinese people’s impressions of the UK was also confirmed by analysis of social media posts in 2019, before the COVID-19 pandemic. Of around 1.2 million posts mentioning the UK, over 280,000 also included education-related keywords, making up more than a fifth of all posts mentioning the country. Seven of the top 20 words most commonly co-occurring with “UK” (英国) were related to study, with the second-most common of all terms being “university” (大学).



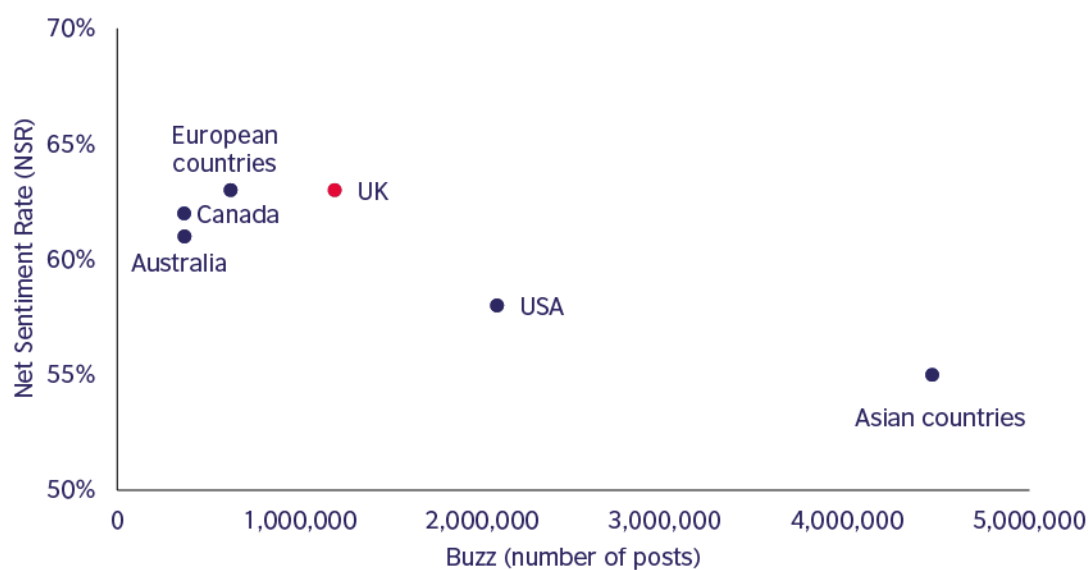
Base: Social media posts mentioning the US, Australia or Canada, November 2018 – October 2019 (~2.1 Mn / ~0.4 Mn / ~0.4 Mn posts respectively)

Overall, social media posts referencing the UK were a little over half as common as those mentioning the US – a ratio very close to that seen in the previous round of social media analysis which covered the period from March 2015 to February 2016. References to the UK were roughly 3.2 times as common as posts mentioning Australia and 3.3 times as common as those referring to Canada.

Analysis of the overall Net Sentiment Rate (NSR) of these posts gave the UK a 63 per cent positive score.⁷ This is notably higher than the NSR of posts mentioning the United States, which had a 58 per cent net sentiment rate, and those mentioning other Asian countries which were only 55 per cent positive. However, it was only slightly higher than posts mentioning Canada and Australia, which had scores of 62 per cent and 63 per cent respectively, and those mentioning other European countries which were 63 per cent positive.

⁷ NSR is defined as the number of posts assessed as positive by Kantar's text analysis engine minus the number assessed as negative, divided by the total number of positive and negative posts.

Figure 3.21: Online buzz and sentiment regarding the UK and other key countries



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

Base: Social media posts mentioning the UK or other key countries or regions, November 2018 – October 2019 (9.1 Mn posts)

In focus groups with Chinese young people, most expressed generally positive impressions of the UK, although only a minority said that they had a particular interest in UK popular culture. When asked for their thoughts on the UK many referred to stereotypes about British people, which in China often centre around the “British gentlemen” archetype – people from the UK are seen as serious and polite, but also somewhat aloof and inflexible. Focus group participants were aware that these were stereotypes rather than accurate descriptions, but most thought that they would hold an element of truth.

As focus groups were made up mainly of students interested in further study overseas, education was unsurprisingly a major topic of discussion and is discussed in more detail in Section 4. In summary the UK was associated with high-quality education, particularly leading universities. However, attitudes towards UK science and technology were more mixed – some people associated the UK with cutting-edge research and new technology, particularly students aiming to study postgraduate courses in science fields who were aware of relevant research coming out of the UK, but most did not see the UK as one of the leading countries in this field.

In contrast, the US was seen by most students as the leading country in terms of technology, but many also named China as a world leader in this area. The number of students describing China as one of the top countries for technological development was noticeably higher in the 2021 focus groups than in those conducted five years

earlier, while the UK performed more poorly in comparison to the previous study, showing that this is becoming less of an advantage in the eyes of students today.

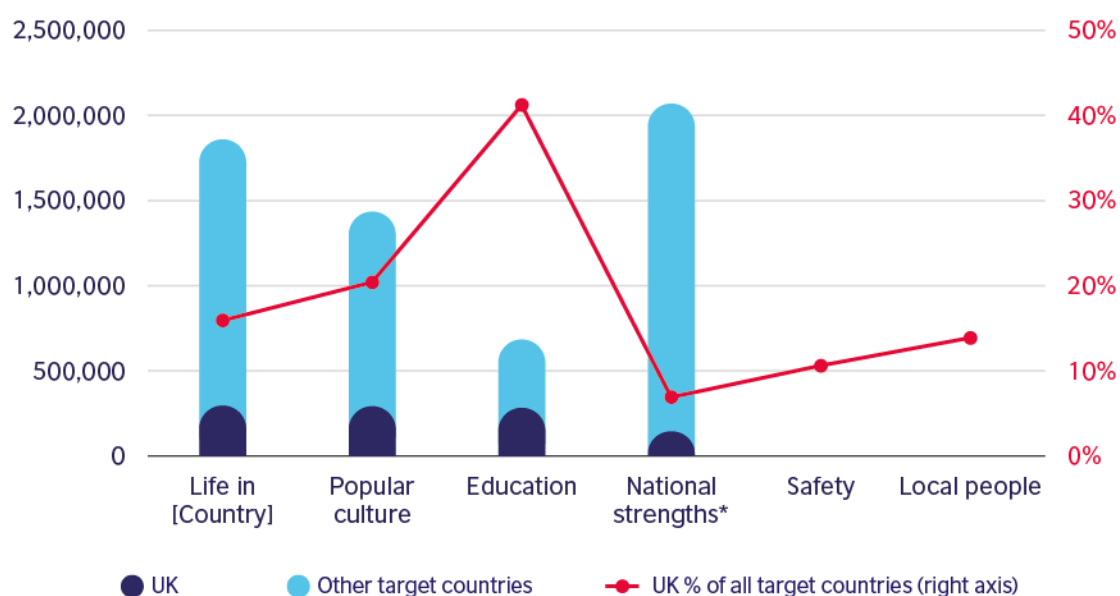
Another area that was often mentioned as a distinctive point of the UK is architecture and the living environment more broadly, with this described as a distinctive UK strength by students in several different groups. Many participants also mentioned the UK's history, generally in positive terms although some also talked about more negative elements like colonialism or the Opium Wars, and there were widespread positive impressions of the UK's museums.

On the other hand, infrastructure was seen as a disadvantage of the UK, especially compared to China. In particular, subways have been built out across many large and medium-sized Chinese cities over the last decade and were seen by several focus group participants as an important sign of a city's level of development. Outside of London the UK does not perform well by this metric, which led one participant to declare that "apart from London, everywhere [in the UK] is just a village". While participants in other groups did not put the point quite so bluntly, there was a clear perception that many Chinese people see even cities like Birmingham and Manchester as less developed than large cities in China or the US.

Other areas where Chinese young people see the UK as at a disadvantage include food and the weather. UK food has a negative reputation in China, and was raised in several groups as a potential reason not to go to the UK. Further questioning about this issue showed that this does not seem to just be a question of stereotypes; participants who had visited the UK or knew people who had lived or studied there often had even stronger negative feelings about British food. Many Chinese people see food as an important element of culture, and in their eyes, this is a definite cultural disadvantage of the UK. Attitudes towards the weather, meanwhile, vary greatly by region: while many students saw the UK's rainy climate and mild summers as a disadvantage, a student from Harbin in the far north of China (where temperatures can fall to as low as -30°C in winter) described the UK's mild winters as a major advantage, while another from an arid area of west China saw regular rain and cool summers as a positive feature of the UK.

One topic of discussion that was prominent in the 2016 focus group discussions was Brexit. Few Chinese young people brought up this issue in 2019 and hardly any mentioned it in 2021 when asked about the UK; this is now seen as a historical episode with no major relevance to Chinese people.

Looking again at social media findings, the UK accounted for around 20 per cent of posts discussing target Anglophone, European and Asian countries in connection with topics related to popular culture in 2019, but accounted for a much smaller proportion of posts categorised as related to national strengths (other than education) and those related to safety (or concerns over safety) in a country.

Figure 3.22: Online buzz on specific topics in the UK and other key countries

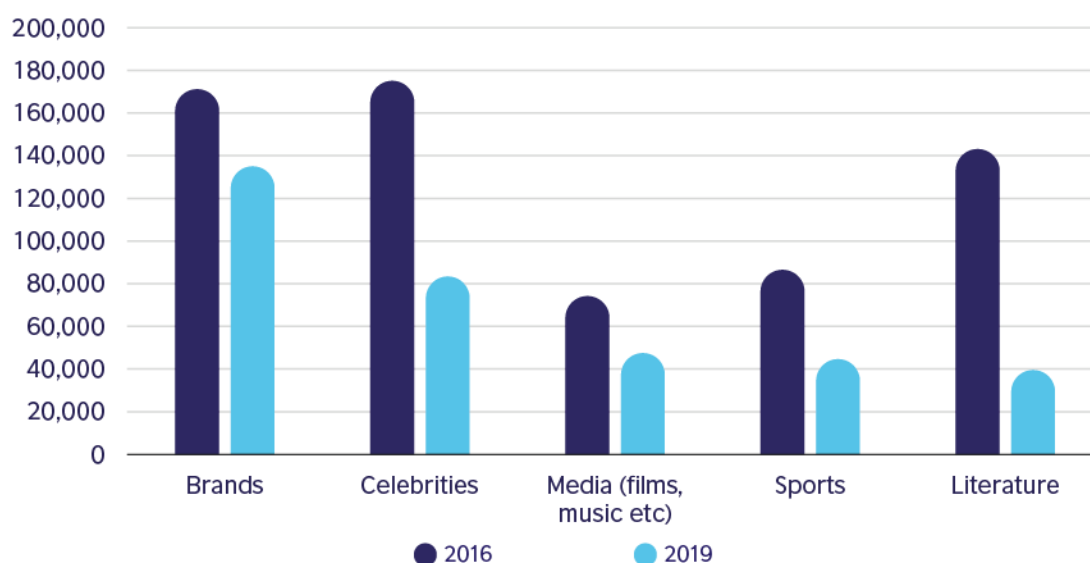
(*) The “national strengths” category excludes education

Base: Social media posts mentioning the UK or other key countries or regions, November 2018 – October 2019 (~9.1 Mn posts)

Breaking down the posts on topics related to popular culture, the most common sub-topic in the 2019 social media sample was brands, with over 135,000 posts. This is a noticeable difference from the 2016 sample which found that celebrities were the most common subject of discussion. Compared to three years earlier, the number of posts related to UK celebrities had dropped by more than half, suggesting declining interest in this aspect of UK popular culture.

The drop in posts related to UK celebrities shows that, in contrast to three years earlier, there was a lack of prominent British celebrities in the eyes of Chinese internet users in 2019. Celebrities mentioned in the previous round of research included David Beckham, Tom Hiddleston, Benedict Cumberbatch and Emma Watson as well as Prince William who was referenced many times in the 2016 research as the period of the Weibo posts covered by that research included the birth of Princess Charlotte.

Meanwhile the number of UK-related posts tagged as literature saw an even sharper decline, falling by almost three quarters. This drop may have been caused by posts related to topics such as Harry Potter and the BBC’s Sherlock TV show being identified as literature in the 2016 research; these topics were substantially less commonly mentioned in 2019 as the BBC Sherlock series had ceased broadcasting by then, while more time has passed since the final Harry Potter book and movie were released.

Figure 3.23: Breakdown of social media buzz related to UK and US popular culture

Base: Social media posts related to UK or US popular culture, March 2015 – February 2016 (~650,000 UK and ~1.0 Mn US posts) and November 2018 – October 2019 (~350,000 UK and ~600,000 US posts)

Focus group discussions in both 2019 and 2021 also showed that some Chinese young people had a strong interest in British popular culture, with films, TV, literature and football all playing prominent roles. However, the UK did seem to fall well behind the US in this area, with participants more likely to name popular American shows and movies than their UK counterparts. There appeared to be a perception that, in the words of one student, “American shows are closer to real life” than British series – a factor that influences interest in overseas study as described in Section 4, as popular media is often the lens through which students’ impressions of life in overseas countries is created.

If measured only by interest in popular media the UK’s position relative to the US appears to have weakened since 2016, although this may be due to a lack of distinctly British content rather than overall strength: several students commented that they categorised music or TV shows as “English-language” rather than British or American, and were often not sure which country was responsible for creating it.

Compared to the 2016 research there also seems to have been an increase in the number of young people naming nearby Asian countries, when asked about their interest in overseas media. Most groups had at least one participant who mentioned an interest in Japanese manga or animation or Korean music or TV dramas. Korean content in particular was more popular among female participants, with one male student (planning to study in Korea) specifically commenting that “Korean media isn’t relevant to me because it’s all aimed at women”.

Looking back to the 2019 social media research, when users discussed the UK’s strengths education was the most-mentioned topic by a large margin. Well over a third of posts tagged as discussing UK national strengths were related to education, with Chinese people describing the UK as having strong universities and being a good place to study abroad.

Education was also the most-mentioned strength of the other target overseas countries, but to a lesser extent than the UK. The second and third most mentioned strengths, film / TV and technology, played a larger role in discussion of the strengths of other Anglophone, European and Asian countries than they did as a proportion of discussion of UK national strengths.

Discussion of British film and TV media included BBC documentaries, which were widely praised online, as well as drama series and comedies. Focus group and survey research shows that older series such as Sherlock and Doctor Who continue to be top of mind when Chinese young people think about the UK. Meanwhile technology rose from outside the top five mentioned UK strengths in 2016 to become the third most prominent factor discussed in 2019, being closely associated with global influence.

Literature and art / design, the UK's 4th and 5th most mentioned strengths, made up a substantially larger proportion of discussion of UK discussion compared to their prominence in discussion of other analysed countries. Both classic masterpieces and more recently published works are seen as advantages of the UK, while British art, design and fashion are also seen as one of the country's strong points. There was often overlap between discussion of different national strengths, for example discussion of the advantages of art education in the UK.

Another area that was often described by focus group participants as a major strength of the UK is safety. While the 2016 research also found this to be important, it was an even more commonly discussed issue in the 2021 focus groups. In general, all overseas countries are seen as less safe than China – a perception which has become more pronounced since the start of the COVID-19 pandemic – but the UK is still seen as having a comparative advantage over other overseas countries here, particularly the US where Chinese young people were very aware of the riots in 2020 and more recent coverage of anti-Asian violence. Perceptions of safety have a direct impact on overseas study intentions and are discussed in more detail in Section 4.

4. THE EFFECT OF CULTURAL INTEREST ON OVERSEAS STUDY INTENTIONS

3.6 Interest in overseas education

As in the 2016 research, surveys showed that a very high proportion of Chinese people claim to be interested in studying abroad. Among current students, almost 55 per cent claim to be at least “seriously considering” studying abroad, including a little over one in ten of all students who said that they “definitely want to” study abroad. Meanwhile almost a tenth of parents of school-age children said that they definitely wanted their child to study abroad, with more than half saying that they were at least seriously considering this option.

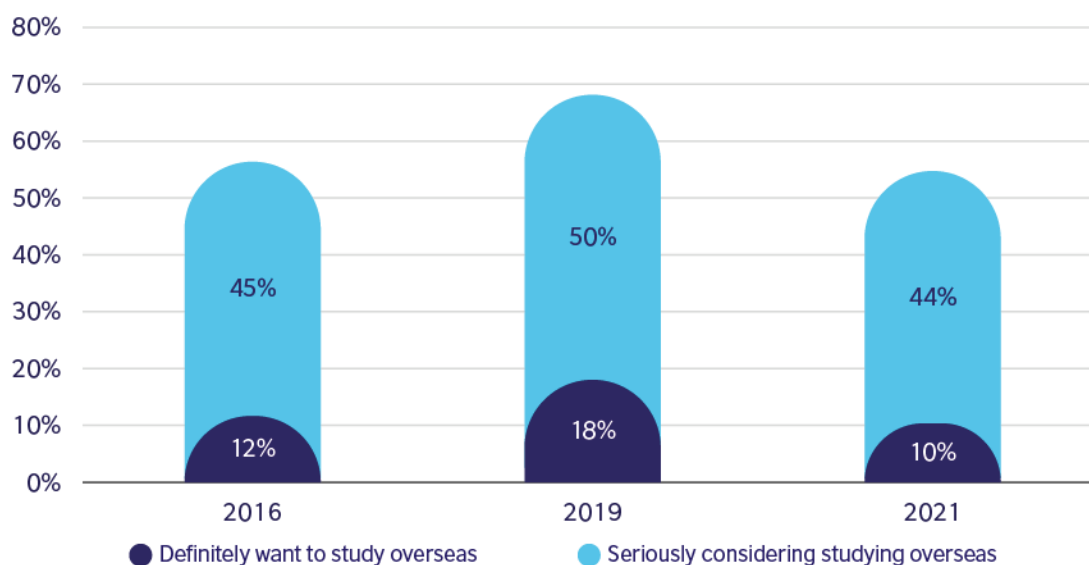
The level of self-declared interest in overseas study is substantially higher than the proportion of Chinese young people who actually go abroad for education. Statistics from the Ministry of Education show that around 703,500 Chinese students went abroad to study in 2019, or a little over 4 per cent of the 18-year-old population.⁸ While this is by no means a small number, it is also far lower than the proportion found in the survey, suggesting that even among the “definitely want to” study group most will not actually go overseas.

The drop-off from people expressing interest in the survey to those actually deciding to study abroad is almost certainly because of practical concerns – while studying abroad seems like an attractive prospect in abstract terms, it is also difficult for most Chinese families to afford to send their children abroad as well as requiring strong language skills and a long period away from home. It is best to see the answers to this survey question as indications of interest rather than as clear predictions of future behaviour.

The proportion of young people saying they wanted to study abroad also saw a significant jump between the 2016 and 2019 survey rounds. This increase is even larger in percentage terms than the 29 per cent growth in actual outbound Chinese students between 2016 and 2019, again suggesting that practical concerns such as finance and language skills are the main limiting factor.

The survey also gives insight as to the effect of the COVID-19 pandemic. In 2019, around 18 per cent of surveyed students said that they “definitely want to” study abroad, with 68 per cent describing themselves as at least seriously considering it. In other words, the number of people in the group most interested in studying abroad has fallen by over 40 per cent in relative terms, while the size of the group saying that they are at least considering it has dropped by around a fifth.

⁸ 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

Figure 4.1: Students' attitudes towards overseas study (2016, 2019 and 2021)

Question: "To what extent are you interested in studying overseas?"

Base: All current students (2016: 1,633 respondents; 2019: 2,642 respondents; 2021: 2,940 respondents)

More direct evidence comes from survey responses about how different countries have handled the COVID-19 pandemic. As noted in Section 3.4, perceptions of how overseas countries responded to COVID-19 were in many cases quite negative. Although students as a whole had slightly more favourable perceptions than other groups, the perception of how the UK handled the pandemic was still negative overall, with 32 per cent saying the country had responded very well or relatively well, while 38 per cent said the opposite. However, proportions among students who said they were seriously considering studying abroad were much more positive: in the case of the UK, 41 per cent of these prospective overseas students had a favourable perception compared to 34 per cent with an unfavourable assessment.

The same applies to all other countries the survey asked about: students planning to study abroad had a more favourable attitude towards each country's COVID-19 response than those who said they were not interested in overseas study, with a difference of between 9 and 16 percentage points in terms of each country's net favourability (i.e. positive minus negative assessments). This shows that perceptions of the severity of COVID-19 overseas and/or overseas countries' competence in handling the pandemic are strongly associated with the desire to study abroad.

Focus group discussions with potential overseas students also shed some light onto the impact of COVID-19. This was a major topic of discussion in all groups across China, with virtually all students saying that this was an important concern.

Although some students expressed concerns about safety, most considered the main negative effect of the pandemic to be the lack of in-person classes rather than direct safety concerns. When discussing the advantages of overseas study, many students pointed towards the different teaching styles offered by overseas universities and the opportunity to experience life in the host country. Online classes were not seen as

offering the same advantages, especially if the courses would be offered online with no opportunity to leave China.

On the other hand, most students had an optimistic attitude towards the pandemic. Participants in almost all groups commented that they expect the situation to have been resolved before the start of the upcoming academic year in September 2021, pointing to vaccines and decreasing case counts.

Others had a more passive attitude towards the situation. One student, who was enrolled in an international-curriculum high school, commented that “I need to go to university anyway, so it doesn’t make a difference if there is a pandemic or not”. Students who have not followed the Chinese high school curriculum are not able to attend domestic universities, which means that this student had no choice but to study abroad, and others in the same situation expressed similar attitudes.

As focus groups deliberately chose students who were considering overseas education, none of the participants had completely ruled out overseas study due to the pandemic, but a small number of students said that they were still considering abandoning their plans if the situation was not resolved before the start of the new academic year. As mentioned above, this was generally framed in terms of not being able to study in-person rather than specifically being concerned about safety – for example, one student commented that “I won’t accept online study” because of the importance of the overseas study experience.

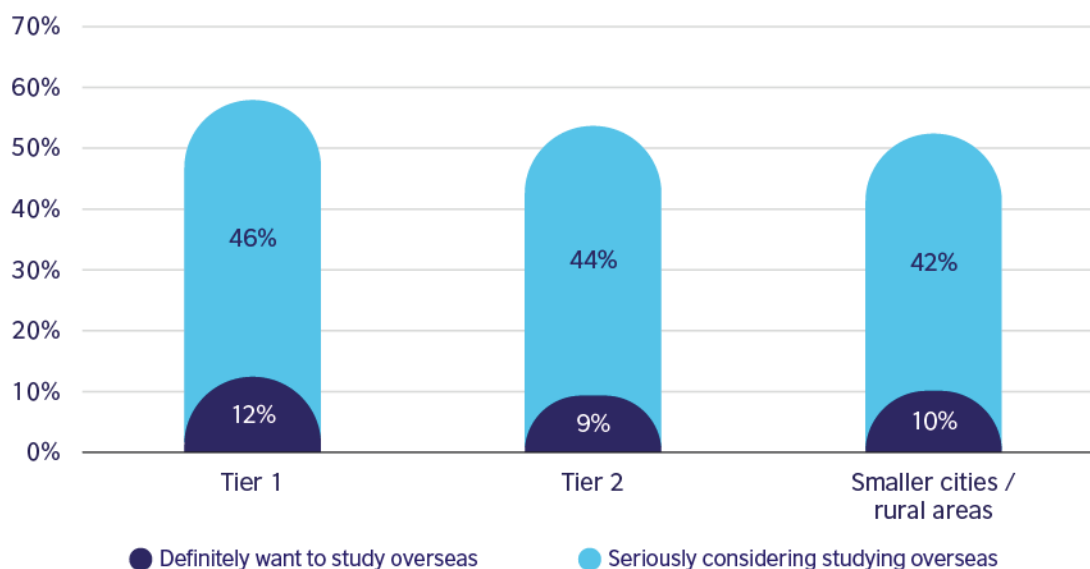
Many also said that they knew friends or classmates who had been considering going abroad but changed their minds due to COVID-19, while one student said that they personally wanted to go abroad but that their parents would probably not support this if the pandemic was still an issue when the time came. Some of the participants had also delayed their overseas study plans for a year due to the pandemic, while one student reported deciding to go to a domestic university instead but performing poorly in the postgraduate entrance exam, leading them to apply to overseas universities after all.

Beyond the pandemic, students’ overseas study intentions have also been affected by political and social developments. Physical safety is a longstanding concern for Chinese students planning to study abroad but this was more prominent in the 2021 round of focus groups, with several students discussing unrest in the United States and Hong Kong along with reports of anti-Chinese racism in several host countries, particularly the US and Australia.

Surveys carried out by the British Council in the first half of 2020 showed that a large proportion of Chinese applicants to UK HEIs named personal safety as an important concern and focus groups in early 2021 confirmed that the UK is seen as less safe than China. However, the focus group research also found that participants generally saw the UK as relatively safe compared to other major destination countries, making this a comparative advantage rather than a disadvantage as described in Section 4.3. Similarly, China’s political disagreements with the US – and to a lesser extent Australia – have affected some students’ decisions but focus groups suggest that these have led more to a change in preference towards other study destinations rather than re-thinking overseas study plans entirely.

Survey results show that interest in overseas study is also affected by several other factors. One of the most important is geographical region. Students in Tier 1 cities are substantially more likely to say they want to study abroad compared to those in Tier 2 and smaller cities, with more than 12 per cent saying they definitely want to study overseas and over half of the remainder saying that they are seriously considering it.

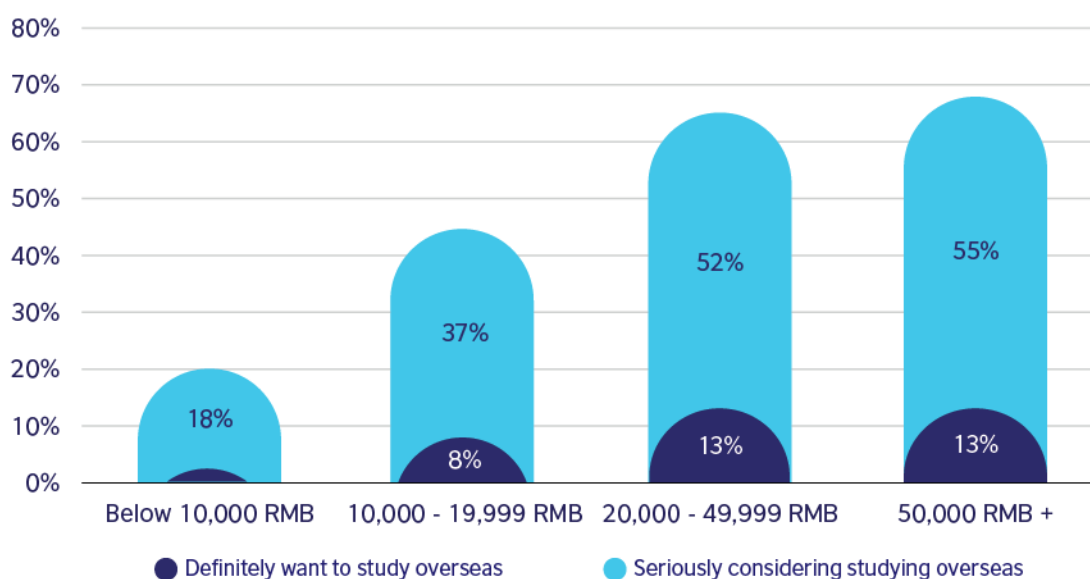
Figure 4.2: Students' attitudes towards overseas study by city tier (2021)



Question: "To what extent are you interested in studying overseas?"

Base: All current students (2,940 respondents)

This geographical variation is largely, although not entirely, driven by differences in income levels. Only 2 per cent of students who said that their monthly household income was below RMB 10,000 described themselves as definitely planning to study abroad, with one in five of this group saying that they were at least seriously considering this option. In comparison, 13 per cent of those claiming household incomes of RMB 20,000 or more said that they were definitely planning on studying abroad and were also substantially more likely than other income groups to say that they were seriously considering this option.

Figure 4.3: Students' attitudes towards overseas study by household income (2021)

Question: "To what extent are you interested in studying overseas?"

Base: Current students who specified their household income (2,913 respondents)

Analysing income and city tier at the same time shows that people from large cities are more likely to want to go abroad than those from less developed areas at all income levels, but that most of the difference comes from income. For example, a comparison between students in Tier 1 and Tier 3+ cities reporting the lowest income levels shows a gap of 0.5 percentage points in the proportion of those students who say they definitely want to study abroad, but a similar comparison between Tier 1 residents in the lowest and highest income bands shows a gap of more than 11 percentage points.

As noted in Section 3, readers should interpret this analysis of differences by income levels with caution, as survey respondents reported substantially higher average incomes than the overall income distribution across China. However, the overall trend – that students from wealthier families have a much greater level of interest in going abroad – seems clear.

Looking at the current level of study of survey respondents, the proportion of students at high school level and below and those currently studying undergraduate programmes who wanted to go abroad was relatively similar, but current postgraduates were much more likely to say they wanted to go overseas for further study. The opposite was true for parents of current students, with parents of older children more likely to say they want to send their child abroad or are considering it, while the proportion decreases as the child passes through the different stages of education, perhaps because this becomes more of a practical question rather than an abstract desire. In comparison to students, parents' interest in sending their child to study abroad is even more strongly affected by family income levels. Compared to previous years, interest in overseas study has fallen among students at all levels of study.

Finally, gender is another area that has seen a change over the last five years. The proportion of both male and female students wanting to study abroad increased

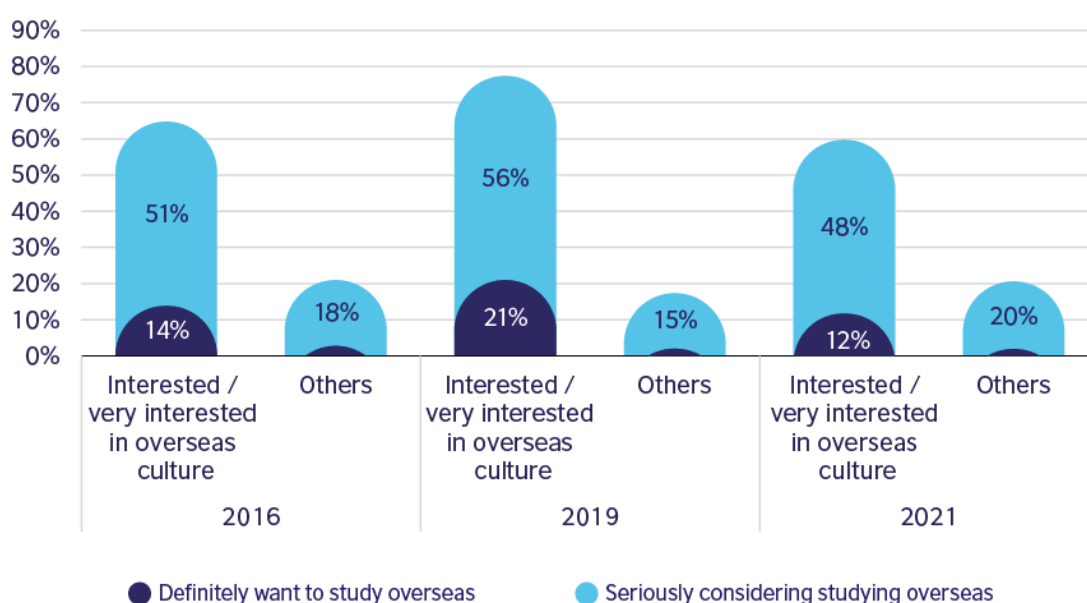
between 2016 and 2019 before decreasing substantially between 2019 and 2021, but the largest overall drop has been among males: 13 per cent of male students said they definitely wanted to study abroad in 2016, compared to slightly over 10 per cent in 2021. Male students were somewhat more likely than females to say they wanted to study abroad in 2016 and 2019, but survey results from 2021 show that they are now slightly less likely than their female counterparts to say they definitely want to study overseas, although the proportion saying they are at least considering it is still a little higher.

3.7 The link between cultural interest and desire to study abroad

Aside from wealth, geography and age, another very important predictor of interest in overseas study is a student's level of interest in overseas culture. The 2016 edition of this report discovered that students describing themselves as interested or very interested in overseas culture were more than three times as likely to say they were considering studying abroad compared to those who did not describe themselves in this way. The ratio in 2019 increased even further, with students describing themselves as interested in overseas culture around 4.5 times as likely to say that they either definitely wanted to study overseas or that they were at least seriously considering it.

Post-COVID surveys show that this effect continues to hold. Despite the overall lower level of intention to study overseas, students who described themselves as interested in overseas culture were far more likely to want to study abroad. However, the survey results do show that the link has been somewhat weakened in the most recent round of research – at least at more casual levels of interest. In 2021, students who said they were interested in overseas culture were only 2.9 times as likely to say they were interested in studying abroad as those who did not express strong interest in overseas culture.

Figure 4.4: Students' attitudes towards overseas study by interest in overseas culture (2016, 2019 and 2021)

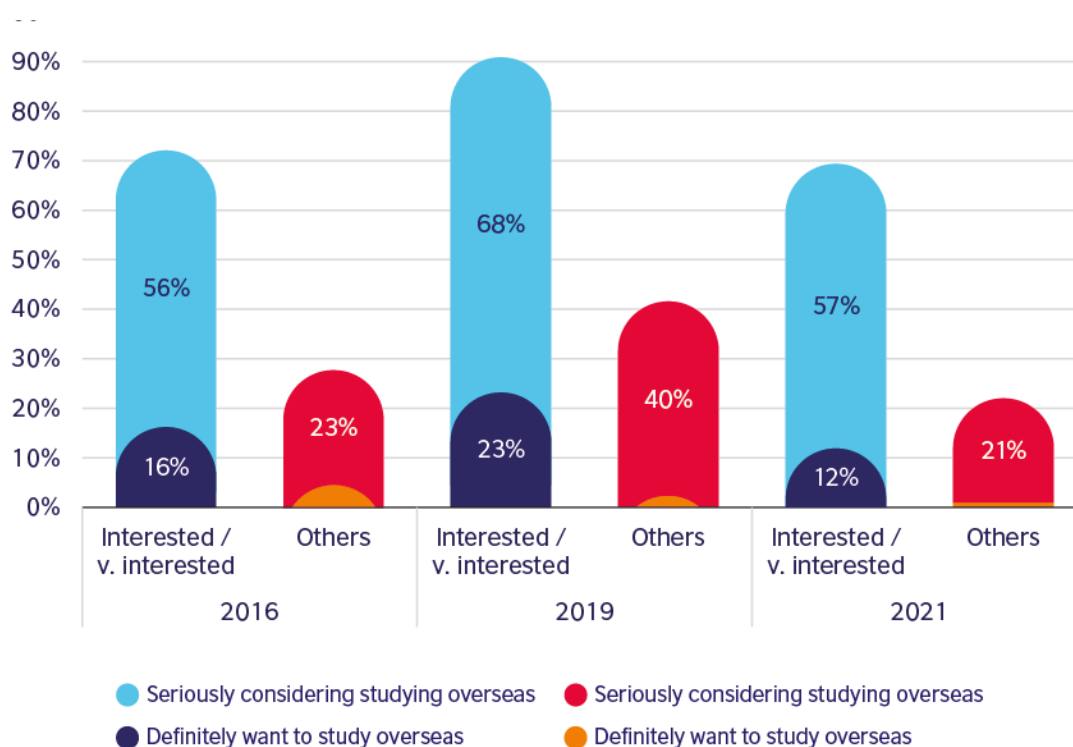


Questions: "Overall, how interested are you in overseas culture?"; "To what extent are you interested in studying overseas?"

Base: All current students who specified their household income (2016: 1,633 respondents; 2019: 2,642 respondents; 2021: 2,940 respondents)

The same trend applies to parents who were asked about their opinions towards their child studying abroad. Those who described themselves as interested or very interested in overseas culture were also substantially more likely to say they wanted their child to study overseas. However, parents' interest in overseas study for their child has fallen more sharply than students' own interest, perhaps because parents tend to place greater weight on safety concerns as described in the following section.

Figure 4.5: Parents' attitudes towards overseas study by interest in overseas culture (2016, 2019 and 2021)



Questions: "Overall, how interested are you in overseas culture?"; "To what extent are you interested in your child studying overseas?"

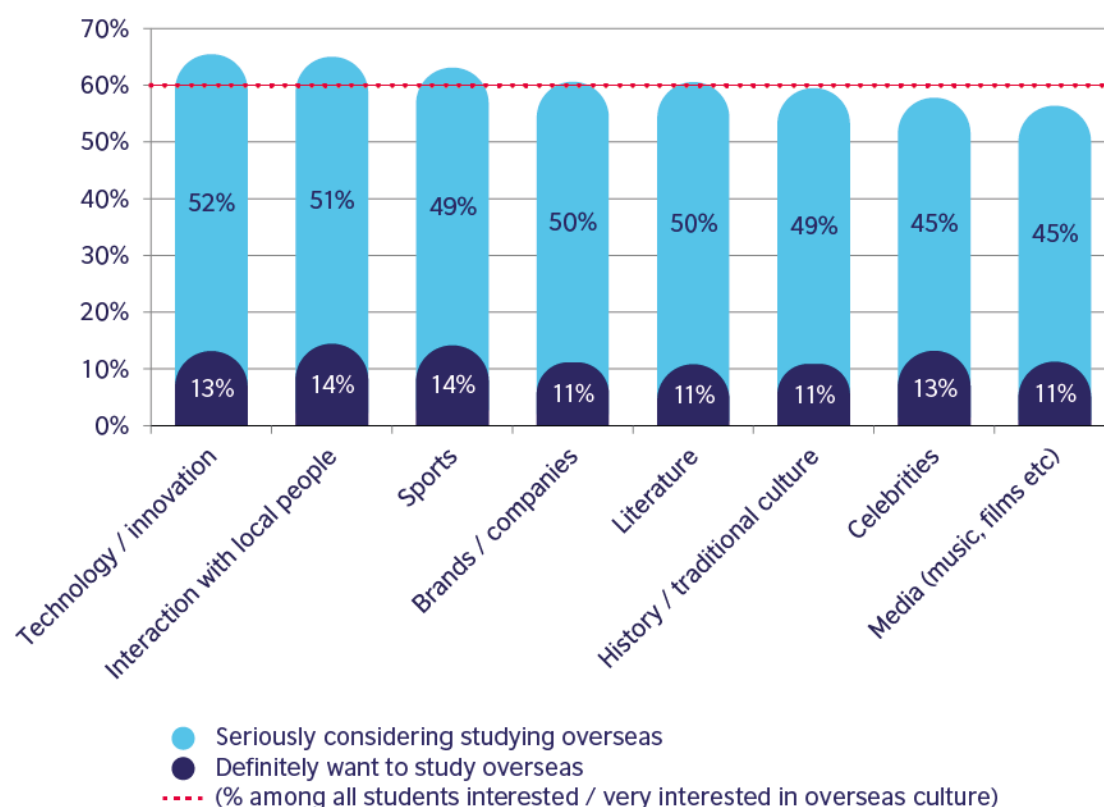
Base: Parents of children in primary school to tertiary education (2016: 1,712 respondents; 2019: 1,567 respondents; 2021: 1,858 respondents)

However, not all aspects of overseas culture have an equal effect on interest in studying abroad. The 2021 surveys also investigated the link between interest in overseas study and the specific aspects of overseas culture that students expressed an interest in. Results showed that the aspect with the strongest effect on overseas study intention was technology and innovation. Almost two thirds of students who were interested in this aspect of overseas culture said they were at least considering studying abroad, compared to 60 per cent of all students who described themselves as interested or very interested in overseas culture and just 21 per cent of those who did not express an interest in overseas culture.

Students describing themselves as interested in interaction with overseas people were also more likely to want to study abroad, as were those who said they were interested in overseas sports. These results largely line up with those from 2016 and 2019, including the perhaps-surprising finding that students who named sports among their interests were more likely to want to study abroad than those with interests such as history or literature, which may seem more closely related to academics.

In comparison, students who named music / films or celebrities as their main overseas cultural interests were less likely to say they wanted to study abroad, suggesting that an interest in these areas would have a smaller impact on overseas study plans. This is again similar to the findings from 2016, where these were also the two bottom groups in terms of overseas study interest. Nevertheless, students who were interested in overseas media and celebrities were still substantially more likely to say that they wanted to study abroad than those that did not describe themselves as interested in overseas culture in the first place.

Figure 4.6: Students' attitudes towards overseas study by interest in specific aspects of overseas culture (2016, 2019 and 2021)



Questions: "To what extent are you interested in studying overseas?"; "Which aspects of overseas culture are you most interested in? (Please choose up to three aspects)"

Base: Students who were interested or very interested in overseas culture (2016: 1,322 respondents; 2019: 2,242 respondents; 2021: 2,566 respondents)

The findings from the parent survey were relatively similar to those of students themselves. Parents interested in interaction with local people, literature or sports were the most likely to want their child to go abroad. Those interested in overseas media,

brands or celebrities were somewhat less likely, but still had much greater interest in overseas study than parents who said they were not interested in any form of overseas culture.

Students in focus groups were also asked about the extent to which interest in overseas culture influenced their plans to study abroad. As with the 2016 research findings, this was definitely not the top reason behind most students' overseas study plans – most students talked about academic factors such as the strength or reputation of overseas universities, or practical concerns like the ability to earn a master's degree in one year in the UK – but several did discuss cultural factors.

For these students, the different lifestyle abroad was an important driver of plans to study overseas. Several linked this to lower stress or a greater degree of independence, seeing Western countries in general as offering more freedom than life in China – although one student did note that, in the context of COVID-19 restrictions, “the UK now has less freedom than China”. These students were particularly likely to want to stay abroad after graduating, but similar opinions were also expressed by students who said they wanted to experience this type of lifestyle before returning home after graduation.

In many cases, students linked these perceptions directly to their expectations of academic life. They considered the independent study habits and free and open learning styles in overseas universities as representative of the more open society in Western countries overall.

Only one student in the 2021 focus groups explicitly linked plans to go abroad to an interest in overseas entertainment media, in contrast to several students in the 2016 round of research that mentioned media such as Harry Potter as inspiring their initial thoughts about studying overseas (although in all cases those students emphasised that this was only a starting point for starting to think about overseas study, not their main reason for going abroad). However, when talking about overseas lifestyles, it was clear that many students were basing these impressions on what they saw in TV shows and other forms of media.

Several students also talked about overseas culture in the context of their preferred subject area. This was particularly true for students in arts-related subjects, with one commenting that China's cultural industries were “backwards” and that the greater artistic freedom abroad was the reason for the attractiveness of overseas media.

For some students, attraction towards overseas study was linked to the differences between Chinese and Western culture. These students talked about wanting to experience a different culture, have new experiences and explore a new world, which they saw as important for personal development even if overseas culture was not necessarily superior to life in China.

One other factor that was often mentioned in focus groups as influencing the decision to study overseas was previous overseas experience – either as a tourist or on a short-term overseas study course. Many students planning to study overseas reported that they had been abroad before, and in several cases students linked their overseas plans specifically to a positive experience before. A typical example is a student who studied

abroad at a summer programme arranged by her Chinese university which inspired her to want to study a master's degree at the partner institution in the UK.

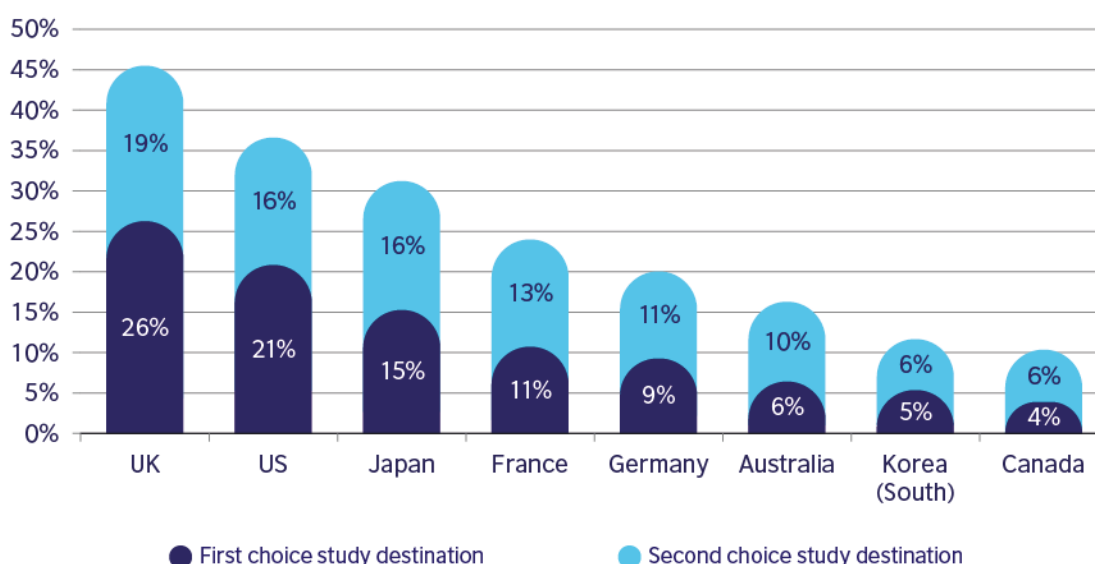
The influence of overseas travel also came across strongly in the survey results. Students who had previously travelled abroad were around twice as likely to say they wanted to study overseas than those who had never left mainland China.⁹ However, this difference overstates the cause-and-effect relationship, because overseas travels are affected by other factors – most notably family wealth and cultural interest, which both have a very strong effect on overseas study plans as described above. After limiting the sample to students who described themselves as interested or very interested in overseas study, students in each income band who had been overseas were between 19 and 26 percentage points more likely to say that they were at least seriously considering studying abroad compared to those who had not previously left China.

3.8 Interest in specific overseas study destinations

In contrast to the findings from the 2016 research, surveys carried out in 2021 showed that the UK had overtaken the US as the preferred overseas study destination among Chinese students. Overall, 26 per cent of surveyed students who described themselves as at least seriously considering overseas study said that the UK was their first-choice study destination, compared to 21 per cent who chose the US and 15 per cent who chose Japan.

The UK performed even more strongly as a second-choice destination, with 45 per cent of survey respondents that said they were considering studying abroad naming the country as one of their top two choices, versus 37 per cent for the US.

Figure 4.7: Students' preferred overseas study destinations (2021)



Question: "If you were to study overseas, which country would you be most interested in studying in?"; "Aside from the country you mentioned in the previous question, which overseas country would you be most interested in studying in?"

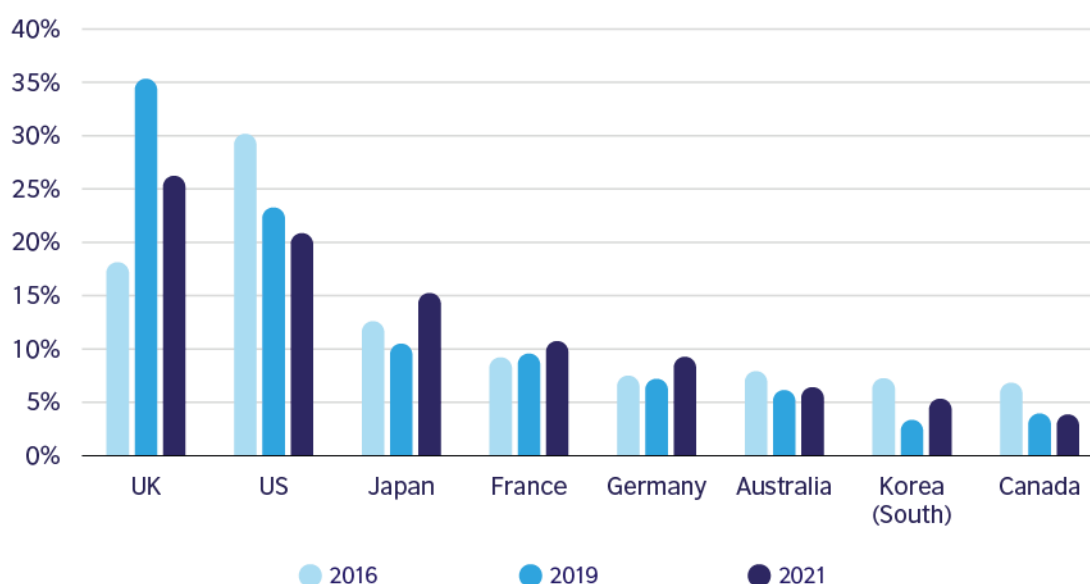
⁹ The survey asked specifically about travels outside of mainland China, which would include trips to places such as Hong Kong.

Base: Students who said they definitely wanted to study abroad or were seriously considering it (1,610 respondents)

Restricting the criteria to students who said that they “definitely want to” study abroad narrows the gap between the UK and US as first-choice destinations, with 28 per cent of this group choosing the UK and 27 per cent saying they want to go to the US. But even in this group the UK still outperforms the US substantially once second-choice destinations are taken into account.

A comparison over time shows that the proportion of students choosing the UK as their first-choice study destination increased greatly between 2016 and 2019, while the proportion that said they preferred other countries – particularly but not only the US – fell substantially. However, the post-pandemic survey showed that interest in both the UK and US has fallen over the last year with students becoming more likely to choose non-Anglophone countries.

Figure 4.8: Students’ preferred overseas study destinations (2016, 2019 and 2021)



Question: “If you were to study overseas, which country would you be most interested in studying in?; “Aside from the country you mentioned in the previous question, which overseas country would you be most interested in studying in?”(Sum of first and second choice destinations)

Base: Students who said they definitely wanted to study abroad or were seriously considering it (2016: 921 respondents; 2019: 1,801 respondents; 2021: 1,610 respondents)

As in previous years, the UK was by far the most common second-choice country for students who chose the US as their first-choice destination, as well as for those choosing France and Australia. Meanwhile students who chose the UK as their top choice were most likely to name the US as their second preference.

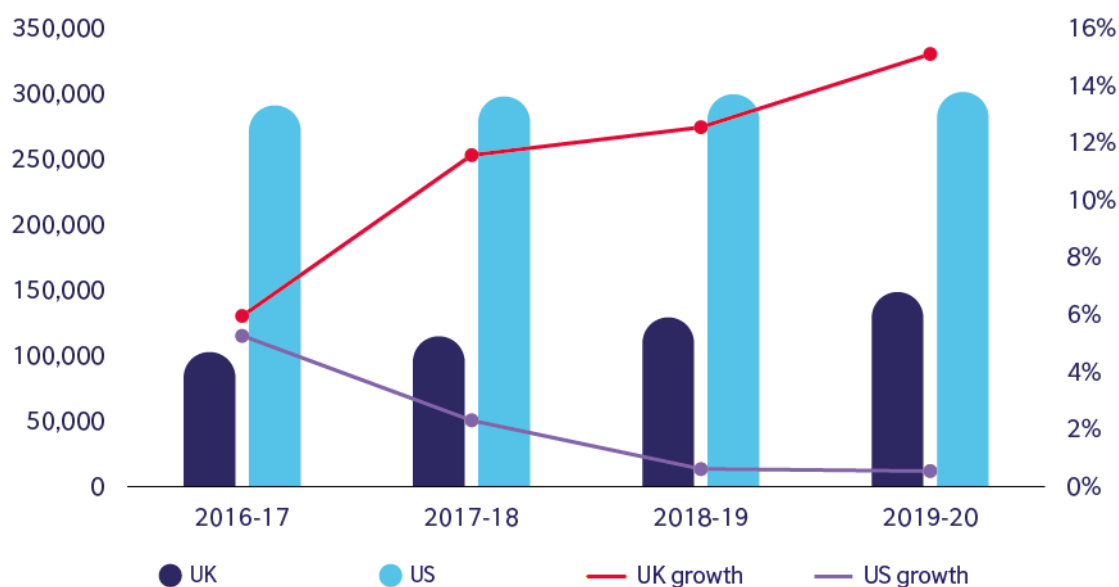
Students choosing Australia as their first choice destination were more likely than average to choose Canada as their second preference and vice versa, although the UK remained the leading second-choice destination for students choosing Australia overall. There were similar connections between Japan and Korea, although again the US was

the top second-choice destination overall for those saying that Japan was their first preference.

The UK was also the top choice of destination among parents who said they were considering sending their children abroad for study, although the gap between the UK and US was somewhat smaller among parents than among students. Students were also noticeably more likely to select Japan or Korea as their first-choice destination, whereas a greater proportion of parents said that they would choose Germany, Australia or Canada.

While post-COVID numbers are not yet available, data up to the 2019/20 academic year confirms that the UK has improved its position compared to the US in terms of Chinese international students – although not to as great an extent as the survey findings would imply. The number of Chinese students studying at UK universities grew from 102,770 in the 2016/17 academic year to 148,530 in 2019/20, an increase of 45 per cent. In contrast the number studying in the US grew by only 4 per cent, although the total number of students is still more than twice those in the UK.

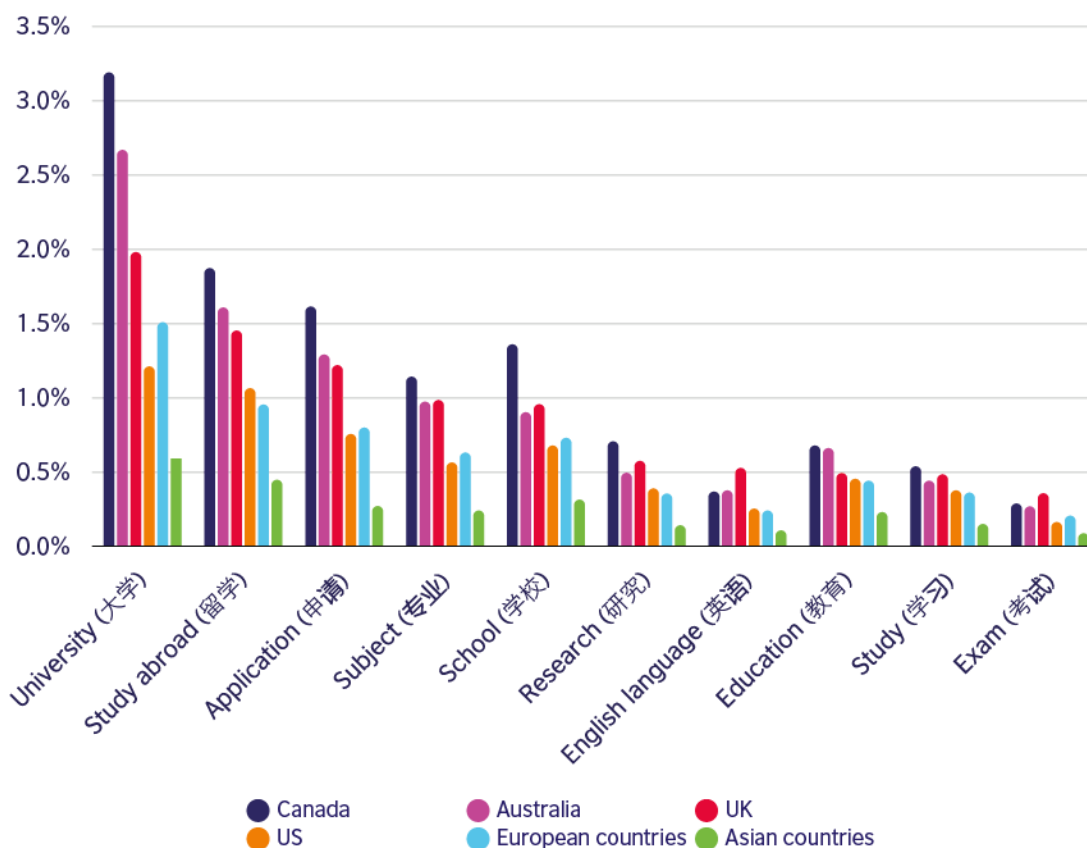
Figure 4.9: International HE students from mainland China studying in the UK and US (2016/17 to 2019/20)



Sources: HESA, IIE. Figures for students in the US exclude participants in the OPT post-study work scheme

As noted in Section 3.5, education-related keywords accounted for a large share of the terms most commonly associated with the UK in Chinese social media posts in 2019. Posts mentioning the UK were slightly less likely to mention most education-related topics than those about Canada or Australia, but more likely to mention these topics than posts related to the US or the target European and Asian countries.

Figure 4.10: Social media posts containing selected education-related keywords as a proportion of all posts discussing target countries

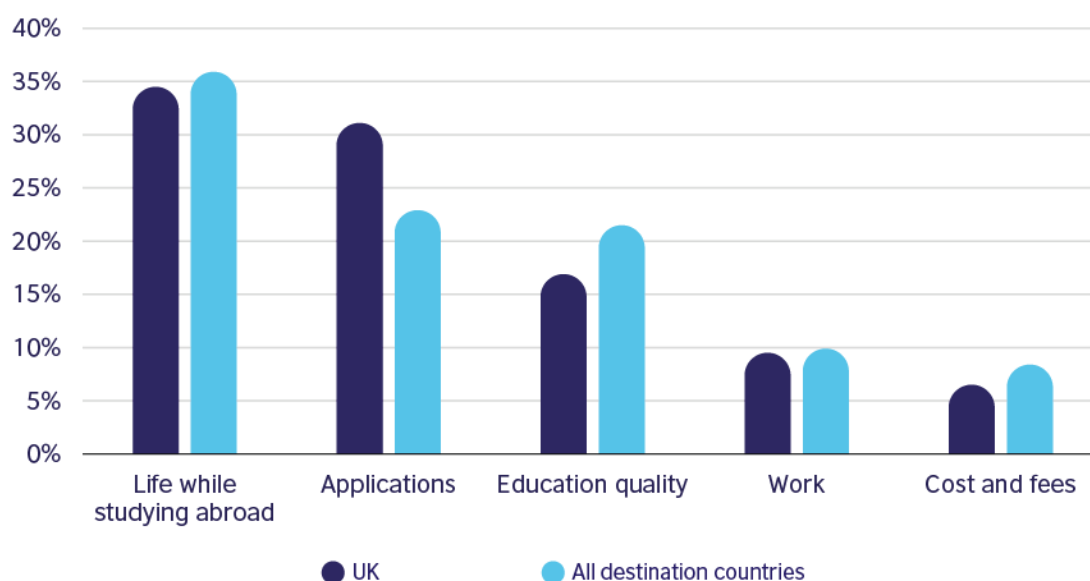


Base: Social media posts mentioning the UK or other key countries or regions, November 2018 – October 2019 (9.1 Mn posts)

Popular keywords across all countries were related to universities (both in general and specific prominent universities in the relevant country), applications, subject areas, languages (including English language tests such as IELTS), and exams. Education was also discussed in the context of life abroad, safety and politics.

Looking at the overall volume of education-related posts – as opposed to their share of the total – the UK's higher proportion of posts linked to this topic area means that there were actually a greater number of social media posts about UK education than about any other single country, although Asian countries as a whole still outnumbered the UK.

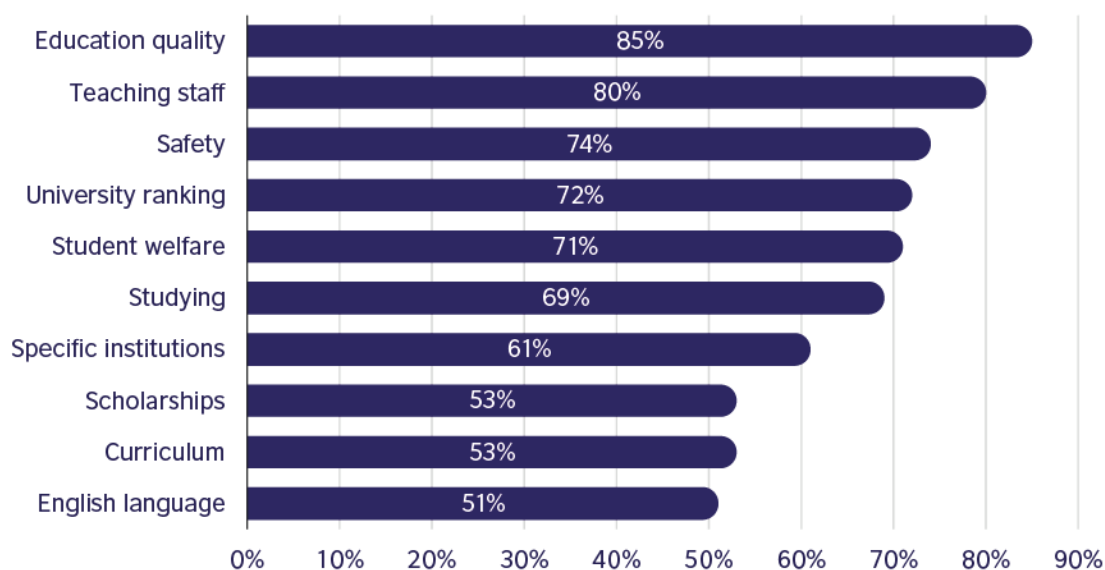
Breaking down discussion of education into five broad categories, the most popular topic of discussion for both the UK and other major study destinations was life while studying abroad – a category consisting largely of Chinese students discussing overseas education in the context of their life abroad. Discussion of UK education was also more likely to discuss applications, while education quality and costs and fees were more common among posts talking about other major destination countries.

Figure 4.11: Social media posts discussing different aspects of education

Base: Social media posts mentioning education in the UK or other key countries or regions, November 2018 – October 2019 (~1.5 Mn posts)

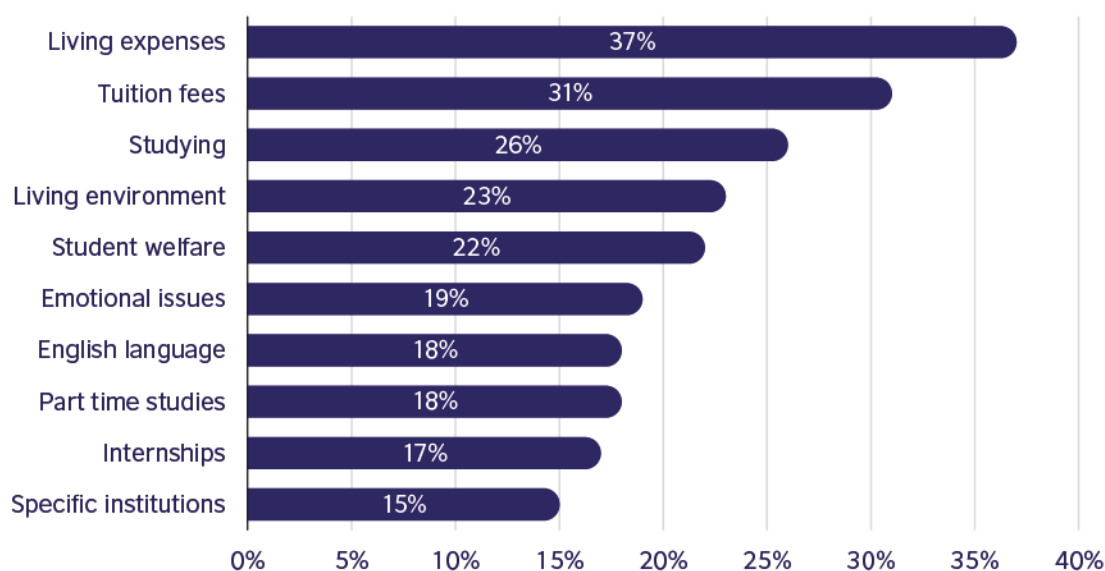
Student focus groups show that potential students from China often rely on social media to find out information about life when studying abroad, looking to learn about this issue from students who are already abroad. This is seen as an important question that is not addressed well by more official information sources.

Meanwhile, analysing posts about the advantages and disadvantages of studying in the UK showed that positive posts often named a large number of advantages – the most common of which were education quality, good teaching staff / academics, and safety. Many of these posts were promotional in nature and written by agents or other related organisations rather than individuals, but analysis of the topics mentioned will still shed some light on the advantages that were being discussed online in 2019.

Figure 4.12: Advantages of UK education discussed in social media posts

Base: Social media posts discussing advantages of UK education, November 2018 – October 2019 (~29,000 posts)

By comparison, posts talking about the UK's disadvantages were more likely to only name one or two issues and to be posted by students themselves. The most common concerns were the costs of studying in the UK – both living expenses and tuition fees – followed by complaints from students having difficulty studying and those who were unsatisfied with their living environment.

Figure 4.13: Disadvantages of UK education discussed in social media posts

Base: Social media posts discussing disadvantages of UK education, November 2018 – October 2019 (~12,000 posts)

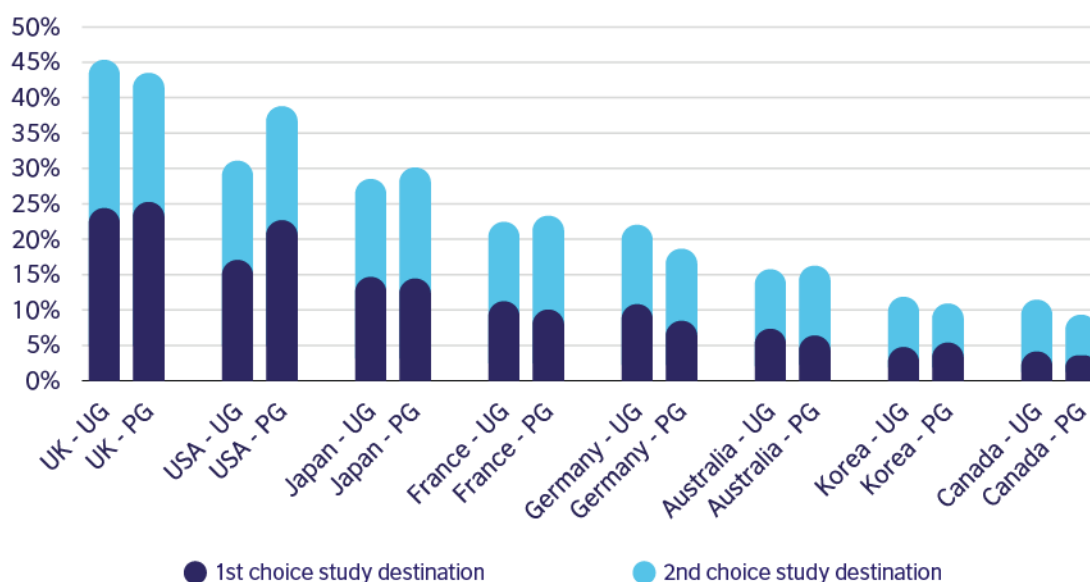
Survey results showed that the most popular levels of study for students planning to study abroad were university courses, by a large margin. Overall, 79 per cent of

students who wanted to study abroad said they wanted to study a postgraduate course, while 29 per cent wanted to study an undergraduate programme. Only 2 per cent of students that said they were at least seriously considering studying abroad did not want to study either an undergraduate or a postgraduate programme.¹⁰

In contrast to the 2016 survey results, the proportion of students saying that the UK was their top choice of destination was relatively similar at both the undergraduate and postgraduate level. The country was slightly more popular as a first-choice destination among prospective postgraduates but slightly more popular among undergraduates as a second-choice preference. However, the difference between these two levels was not statistically significant in either case.

Meanwhile the US was notably more popular among prospective postgraduates, while in contrast students who said they were considering undergraduate study abroad were more likely to choose Germany, Canada, or destinations outside the top 8 shown on the chart below (such as Singapore or New Zealand).

Figure 4.14: Students' preferred study destinations, by intended level of study (2021)



Question: "If you were to study overseas, which country would you be most interested in studying in?"; "Aside from the country you mentioned in the previous question, which overseas country would you be most interested in studying in?" (Sum of first and second choice destinations); "If you were to study overseas, which type(s) of course would you be interested in studying?"

Base: Students who said they definitely wanted to study abroad at the undergraduate and/or postgraduate level or were seriously considering it (1,576 respondents)

These results were notably different to those from 2016, where the UK performed extremely well among prospective postgraduates but less well among prospective undergraduates. The shift towards the UK as preferred destination country is mainly a

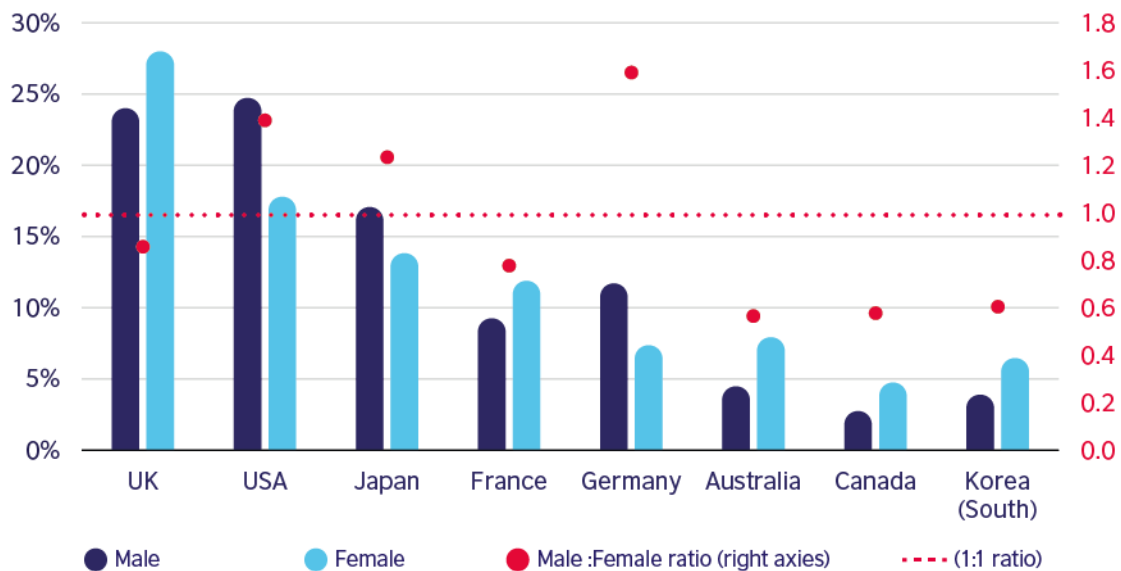
¹⁰ These figures add up to more than 100 per cent as some students said they wanted to study both an undergraduate and a postgraduate course overseas.

result of an increase in prospective students saying they want to study in the UK, while the increase among prospective postgraduates has been much smaller.

Gender also has a substantial impact on choice of country. Although the UK was the leading choice of study destination overall, this was mainly driven by a strong preference for the country among female students. Among male students, the most popular first-choice destination was actually the US.

Overall, the ratio between male and female students choosing the UK as their first-choice study destination is around 0.86 – in other words, for every 100 female students that would prefer to study in the UK, 86 male students feel the same way. In comparison the equivalent ratio for the US is 1.39. Male students were also more likely than their female counterparts to choose Japan or Germany as their preferred country of study, while Korea, Australia, Canada and France were all more popular among female students.

Figure 4.15: Students' preferred study destinations, by gender (2021)



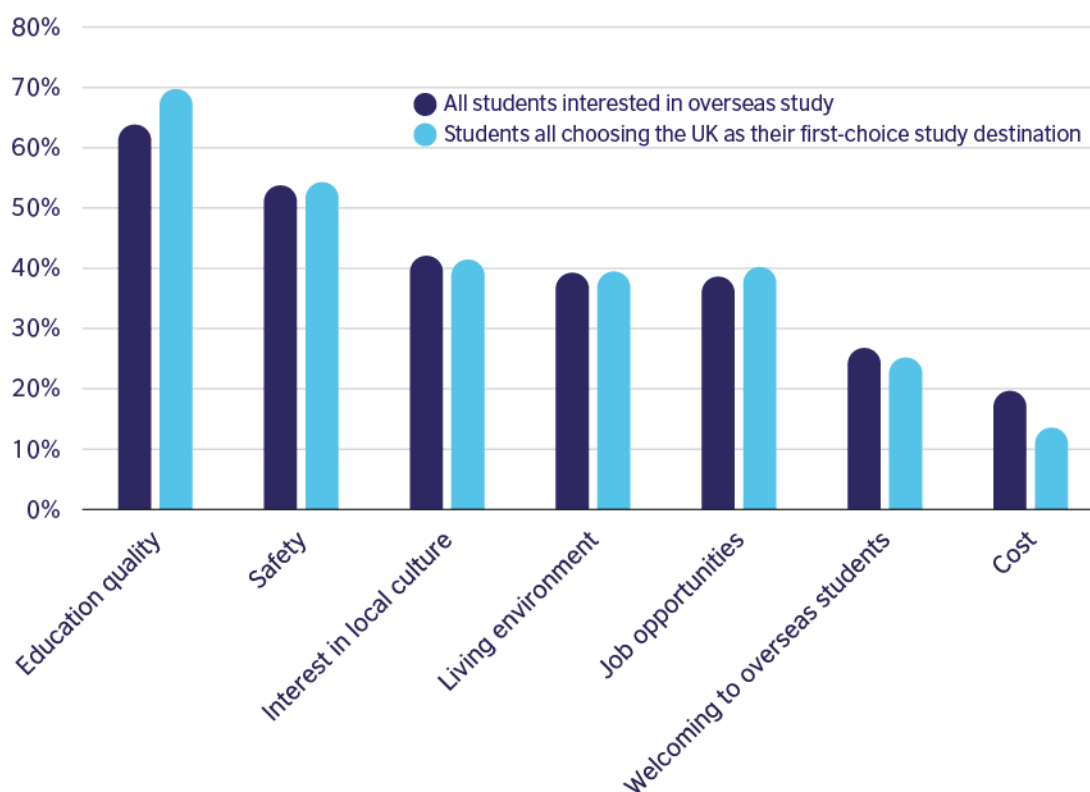
Question: "If you were to study overseas, which country would you be most interested in studying in?"
Base: Students who said they definitely wanted to study abroad or were seriously considering it (1,610 respondents)

Looking at wealth, there is no clear and consistent connection between household incomes and preference for the UK, but there is a noticeable trend that students who report higher household incomes are more likely to choose European countries as their first-choice study destination, while both the US and South Korea are somewhat more popular among less wealthy households.

Students who said they were seriously interested in studying abroad were also asked about the factors which they found important when choosing a destination country. The most important factor overall was education quality, chosen as one of the three most important factors by almost two thirds of students – and by 70 per cent of those who named the UK as their first-choice destination. Safety was the second most important

factor, named by slightly over half of all students, while interest in the local culture was seen as important by 42 per cent of all respondents who said they were considering studying abroad. Of the seven named factors, cost was the least likely to be chosen as a critical decision factor, mentioned as a top-3 issue by only 20 per cent of students overall and just 14 per cent of those who said that the UK was their preferred destination.

Figure 4.16: Factors students see as important when choosing a study destination (2021)



Question: "When choosing an overseas study destination, which factors do you see as most important? (Please choose up to three factors)"

Base: Students who said they definitely wanted to study abroad or were seriously considering it (1,610 respondents)

Compared to before the pandemic, most factors have changed relatively little in terms of importance. Education quality was seen as an important factor by 63 per cent of students in 2019 compared to 64 per cent in 2021, while the importance of interest in local culture has increased slightly from 39 to 42 per cent. The largest change has been in the proportion of prospective overseas students identifying safety as one of the most important considerations when choosing a country, which has gone up from 49 to 54 per cent.

The factors behind students' choice of study destination were also discussed through focus groups. As shown in the survey results, prospective students placed the most value on education quality. This was true to an even greater extent than in the survey results, showing that this factor becomes more important for students who are actively engaged in planning for overseas study rather than those who are considering it in more abstract terms like many survey respondents.

Focus group participants discussed the advantages of universities in their destination country both in terms of broad academic prestige and ranking as well as subject-specific strengths, with several linking a country's overall strength in a particular field – such as computing or art and design – to an expectation that the country's universities would be good at teaching relevant subjects. For example, one health economics student had chosen the UK over the US due to the differences between the two countries' respective public health systems, while a student planning to study computer science had chosen the United States due to the strength of internet companies from Silicon Valley.

Practical concerns were also comparatively more important among focus group participants. One particular advantage of the UK, raised especially by students applying for postgraduate courses, was the country's one-year master's degrees. Students across all parts of China find this attractive both because they can spend less time to complete their degree and because the shorter course would correspond to lower total costs after considering fees and living expenses.

Although safety was named as the second most important factor among survey respondents who said they were considering studying abroad, this was substantially less important among focus group participants who were actively engaged in applying for overseas study. Again, it is worth remembering that the true proportion of Chinese students heading abroad is significantly lower than the proportion who described themselves as considering studying abroad in the survey, who accounted for more than half of all current students in the survey sample. The survey findings should be regarded as an initial expression of interest rather than as the opinions of young people who will actually go to study abroad – but this does not mean that the results are not valuable, because it provides insights into the issues students see as important at the very early stages of the decision funnel.

As described in Section 4.1, the key question among students regarding the COVID-19 pandemic was whether in-person courses would be available. Only a small minority of students saw it as a direct safety concern, although parents may be more concerned than the students themselves – one student commented that they personally were not worried but their parents had refused to support them going to the UK given the situation, instead insisting that they study in Hong Kong or abandon their overseas study plans entirely. Nevertheless, as shown in the survey results, the importance of safety to students participating in focus groups has increased compared to that seen in previous years.

Aside from the pandemic, fear of violence also appeared to have become more important to Chinese students. This is particularly true for those considering studying in the United States. The country's riots in summer 2020 were widely reported in Chinese media, while more recent cases of anti-Chinese racism have also raised concern. As with previous rounds of focus group research, female students were generally more likely to be concerned about these issues, with some linking it specifically to gender. For example, one focus group participant commented that the UK's greater degree of safety made the country "more suitable for female students". Some students also commented that political unrest in Hong Kong had also made the city a less attractive option for overseas study.

Nevertheless, the importance of safety should not be overstated. This has long been seen as a disadvantage of the US, but did not stop the country being seen as the most attractive study destination in the 2016 research as well as attracting more Chinese international students than any other country worldwide. For most students this is seen as something to be aware of but not a deciding factor when choosing a place to study.

However, most of the drop in interest in US study came well before the COVID-19 pandemic, with the number of survey respondents choosing this country as their most-preferred study destination falling from 30 per cent in 2016 to 23 per cent in 2019. Focus groups conducted in 2019 showed that the most important reason for this drop was the country's relationship with China as well as its international policy more broadly, while the 2021 round of research confirms that this is still an important concern.

Student focus group participants in both 2019 and 2021 show that many students are concerned about US visa restrictions on Chinese students. Even though these restrictions only apply to a relatively small proportion of students, many had heard stories or at least rumours of students being accepted to US universities but being refused a visa to go abroad, and even students who would not be directly affected by the policies had re-assessed their study plans based on this. For example, a student interviewed in 2019 commented that they had decided to apply to other countries despite studying at a US-curriculum high school, and that many of their classmates had made the same decision. Other students discussed concern that it may be more difficult for them to stay in the United States after graduation in the context of anti-China policies and more general anti-immigrant rhetoric.

Students participating in focus groups in 2021 appeared to have many of the same concerns, despite the replacement of Trump as president. Although some expected that the trade war may wind down under the new administration, others were less sure and pointed out that tensions between the two countries were still continuing.

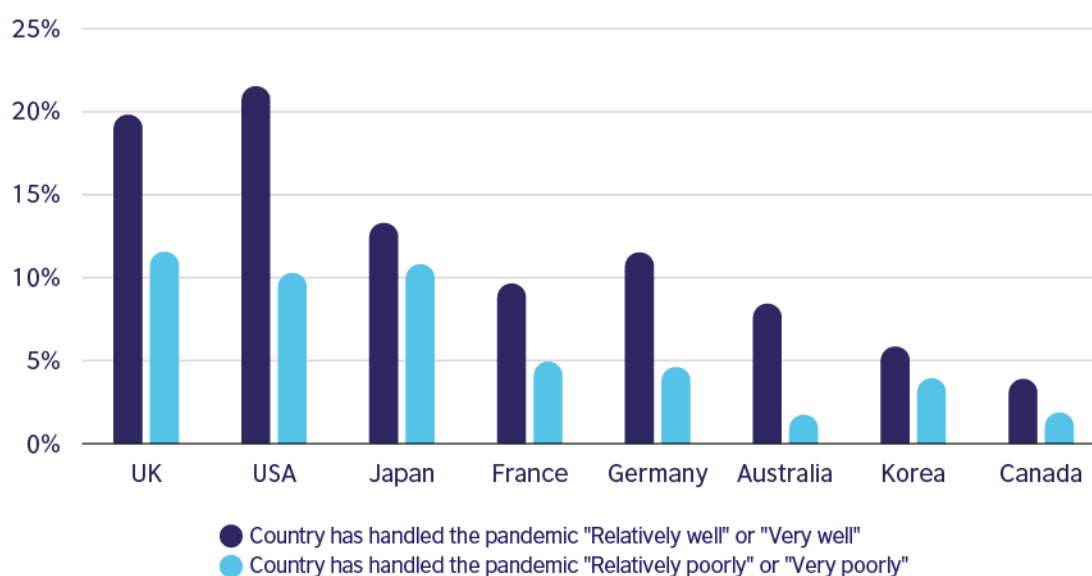
Shifting focus to the UK, focus group participants did not proactively comment on recent changes to the country's policy on post-graduation work rights. Although most prospective UK students were aware that they would be able to stay for up to two years after graduation, many thought that it would be difficult to find work or said that they would prefer to return to China. However, in comparison to the 2016 round of focus groups, most students at least did not name this as a significant disadvantage of the UK – with the exception of one student, who said that she had heard from friends that it was more difficult to stay and work in the UK than in other countries, and who thought this must be because the graduate route visa was difficult to apply for rather than because of previous policies that have now been changed.

To better understand the impact of the COVID-19 pandemic, it is also helpful to compare which overseas destination country respondents chose with their assessment of how the UK and other countries have handled the pandemic. As noted in Section 4.1, there was a certain amount of overlap between students having a positive perception of how different overseas countries had handled the pandemic, and students who were more

likely to be interested in going abroad at all.¹¹ But even after taking this into account, students with more positive perceptions of a particular country's COVID-19 response were more likely to choose that country as their preferred destination.

Looking at the overall student sample, around 14 per cent of all student respondents said that they were at least considering studying abroad and would choose the UK as their preferred study destination. This proportion increases to 20 per cent among those who feel that the UK has handled the pandemic "well" or "very well" but was only 12 per cent among those who felt that the UK's management of COVID-19 was "poor" or "very poor". Among students who believed that the US had handled the pandemic well, the proportion of students who said they wanted to study in the country was as high as 22 per cent, but this was a much smaller group than those who disapproved of the US COVID-19 response.

Figure 4.17: Students' overseas study intentions by perceptions of countries' response to the COVID-19 pandemic (2021)



Questions: "To what extent are you interested in studying overseas?"; "If you were to study overseas, which country would you be most interested in studying in?"; "How well do you feel the following countries have responded to the COVID-19 pandemic?"

Base: All current students (2,940 respondents)

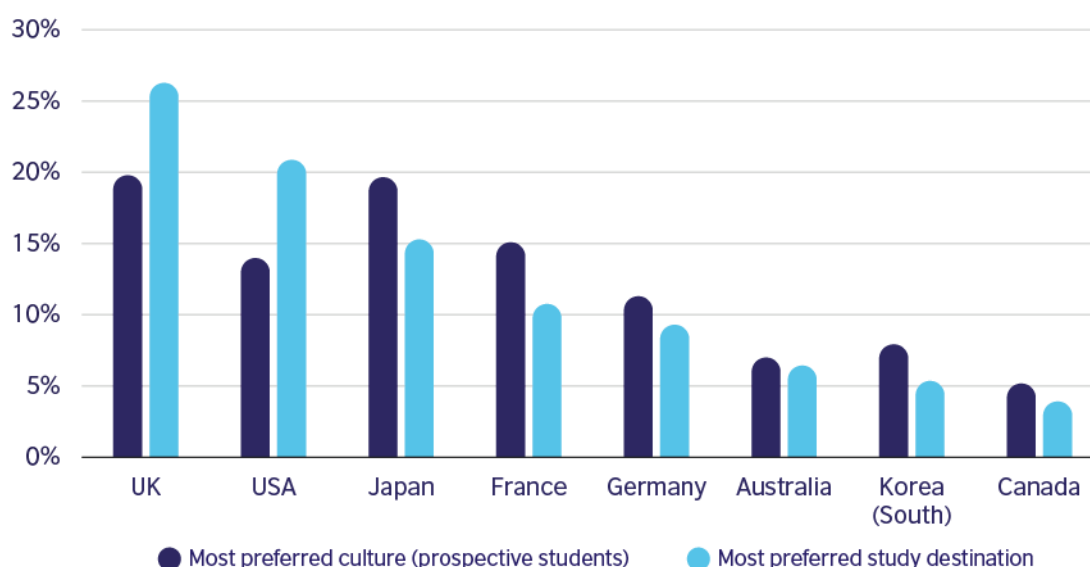
¹¹ In other words, people who thought that e.g. the UK had handled the pandemic poorly were also likely to have negative perceptions of the US COVID-19 response

3.9 Impact of cultural interest on preferred study destination

As described in the previous section, 42 per cent of Chinese students who say they are seriously considering overseas study report that interest in a country's culture is an important factor when deciding where to study. This is a higher proportion than those naming factors like job opportunities or tuition fees, although still well behind education quality which was named as the top factor.

An overall comparison between the most-preferred cultures among students who say they are likely to study abroad and the preferred study destinations of the same students shows that the same countries are generally preferred for both purposes, although there are also clear differences between the two measures. The UK and US both perform more strongly in terms of study plans than the proportion of students who say these are their preferred overseas countries in cultural terms, while other countries, particularly Japan, France and Korea, are more likely to be seen as culturally attractive than they are to be regarded as a suitable study destination.

Figure 4.18: Prospective overseas students' preferred overseas countries in terms of culture and overseas study (2021)



Question: "Which overseas country's popular culture do you most prefer?"; "If you were to study overseas, which country would you be most interested in studying in?"

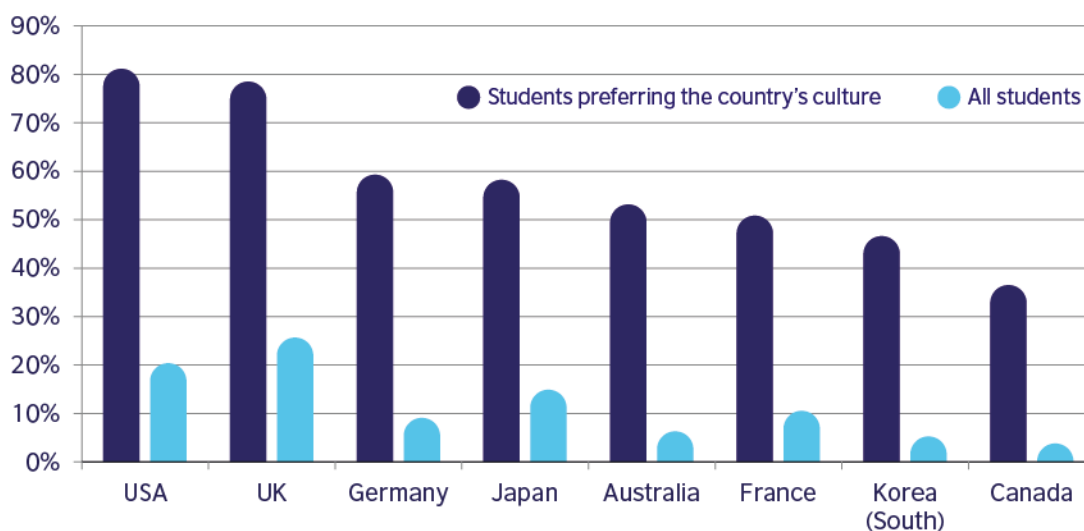
Base: Students who said they were interested or very interested in overseas culture and definitely wanted to study abroad or were seriously considering it (1,533 respondents)

Analysing the connection between individual students' study preferences and the countries they find most attractive from a cultural perspective shows that the impact of overseas culture is even stronger than the chart above implies. Overall, 63 per cent of students who said they were considering studying overseas named the country whose culture they most preferred as their top choice of study destination – a proportion which increases to 65 per cent among those who described themselves as interested or very interested in overseas culture.

Overall, 81 per cent of students considering studying abroad who preferred US culture also said that this was their top choice of study destination. Among those choosing the

UK the corresponding proportion was 78 per cent, while even in Canada – which few survey respondents chose as their preferred overseas study destination – 36 per cent of those who were attracted to the country’s culture said they wanted to study there. In any given country, students who rated this country as having the most attractive culture were between 3 and 10 times as likely to say they wanted to study there compared to the total across all students who planned to study abroad.

Figure 4.19: Connections between prospective overseas students’ preferred overseas countries in terms of culture and overseas study (2021)



Question: “Which overseas country’s popular culture do you most prefer?”; “If you were to study overseas, which country would you be most interested in studying in?”

Base: Students who said they were interested or very interested in overseas culture and definitely wanted to study abroad or were seriously considering it (1,533 respondents)

If second-choice study destinations are also included, the proportion of prospective overseas students preferring the UK’s culture who are also considering studying in the UK increases to 89 per cent, compared to 44 per cent of those who did not choose the UK as their preferred country in terms of culture. The corresponding figures for the US are 90 and 36 per cent. 2021 survey results show an even closer relationship between study country preference and cultural interest than those from 2016.

This relationship holds not only for students who said that interest in a country’s culture was an important part of their choice of study destination, but also for those who said that this was not one of their top 3 factors. Even among this group, students naming each country as their preferred culture were at least twice as likely to name it as their top choice of destination compared to the overall prospective-student population.

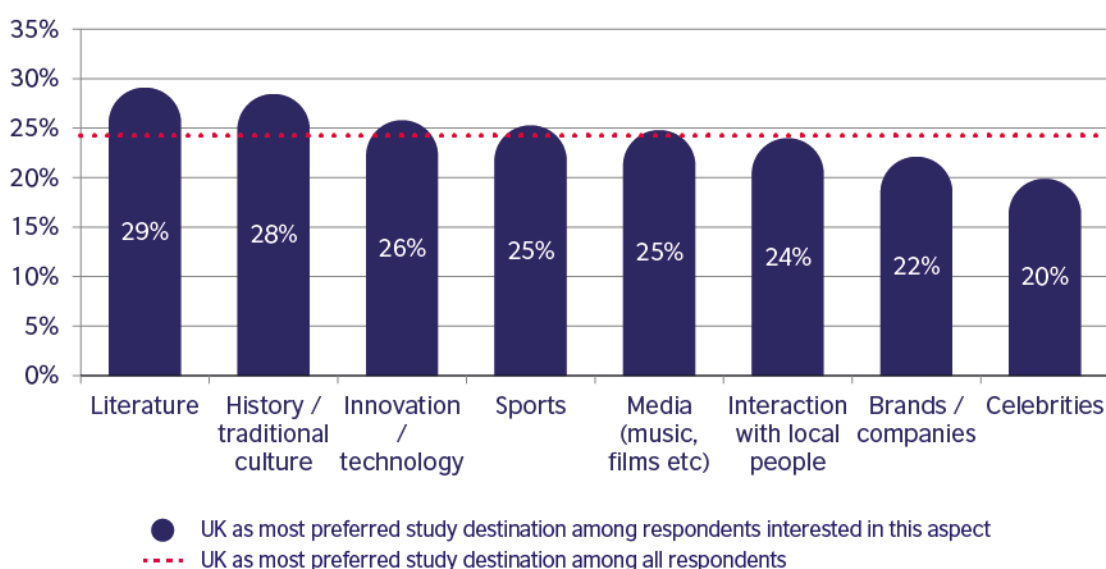
Beyond overall overseas study intention as described in Section 4.2, previous travel to a country is closely related to plans to study in that country. Among students who say they are considering going abroad for study, 29 per cent of those that have previously visited the UK chose the country as their first-choice destination, compared 26 per cent of those who had not travelled abroad and only 17 per cent of those who had been to another overseas country but not the UK. Several focus group participants mentioned that their desire to study in a particular country had been confirmed by an exchange or

summer programme in that country, while at the same time short-term overseas study is sometimes used as a way to “try out” different potential study destinations, especially among younger students who are planning to enrol in overseas undergraduate programmes.

On the other hand, not every overseas experience is positive. One student discussed having her wallet stolen on a trip to the UK, which gave her a negative attitude towards studying in the country. Another said that previous trips had confirmed the stereotype of the UK having bad food, which was one factor in their decision to choose a different study destination.

Beyond students’ overall choice of preferred overseas culture, attitudes towards specific aspects of overseas culture also has an impact on study destination preferences. The UK is particularly likely to be seen as an attractive study destination by students who have an interest in literature or history, while the country is less likely to be chosen as the top destination by those more attracted to celebrities or brands.

Figure 4.20: Popularity of UK study by interested aspects of overseas culture (2021)



Questions: “Which aspects of overseas culture are you most interested in? (Please choose up to three aspects)”; “If you were to study overseas, which country would you be most interested in studying in?”
Base: Students who said they were interested or very interested in overseas culture and definitely wanted to study abroad or were seriously considering it (1,533 respondents)

The general pattern of these results is similar to that seen in 2016: if a student is interested in an area of culture where a country is seen as strong, they are also more likely to name this country as a place where they want to study. The overall areas of strength also overlap with those found in the 2016 research, with people interested in literature still preferring the UK while Korea is associated with celebrities and those with an interest in overseas sports are the most likely to prefer the US.

Country	Most popular among students interested in	Least popular among students interested in
US	Sports	History / traditional culture
UK	Literature	Celebrities
Japan	Media	Sports
France	Media	Interaction with local people
Australia	Interaction with local people	Celebrities
Germany	Technology / innovation	Media
Canada	Friendliness of local people	Sports
South Korea	Celebrities	Sports

As noted in previous sections, survey respondents were far more likely to say they were considering studying abroad than the proportion of Chinese students who eventually do go overseas to study. Even respondents saying they definitely plan to study abroad will probably eventually decide not to do so after they take into account practical considerations like tuition fees and living expenses, academic requirements, and the need to stay away from home for several years.

In comparison to survey respondents, focus group participants who were actively engaged in applying to study abroad said that they placed comparatively less importance on cultural interest than the survey results would suggest. Most do not see this as a decisive factor in their decision of an overseas country, with academic strength, course length and employability usually seen as much more important issues to consider. One student commented that “if cultural interest was the major factor I would have chosen the UK but my goal is my career”, while another said that “safety in the UK is more important” than their interest in US media.

At the same time, a significant minority of students did say that cultural interest had a real impact. Even when downplaying the relevance of cultural factors, one student commented that “cultural interest counts for maybe 20 per cent of the decision – 80 per cent is educational factors”, while others talked about this as a side-benefit of studying abroad, like a student who was excited about studying in the US because they would be able to attend concerts of bands they liked. One participant did directly attribute their choice of destination to cultural interest, seeing Japan as the best place to study music largely because of a composer they admired from the country.

Beyond the factors that students consciously take into account, several focus group participants commented that they had a particular country in mind when they started seriously thinking about applying to an overseas university. While some students do change their minds about this – for example, a focus group participant who commented that they initially planned to study in the US but decided to study in the UK after finding out about the country’s one-year master’s degree courses – many stick with their initial choice and pay much less attention to other options.

As most survey respondents are not yet at the stage of actively looking into overseas study, the preferred study destination they list in the survey is likely to represent this first initial option. Compared to the situation in 2016, the UK has become more

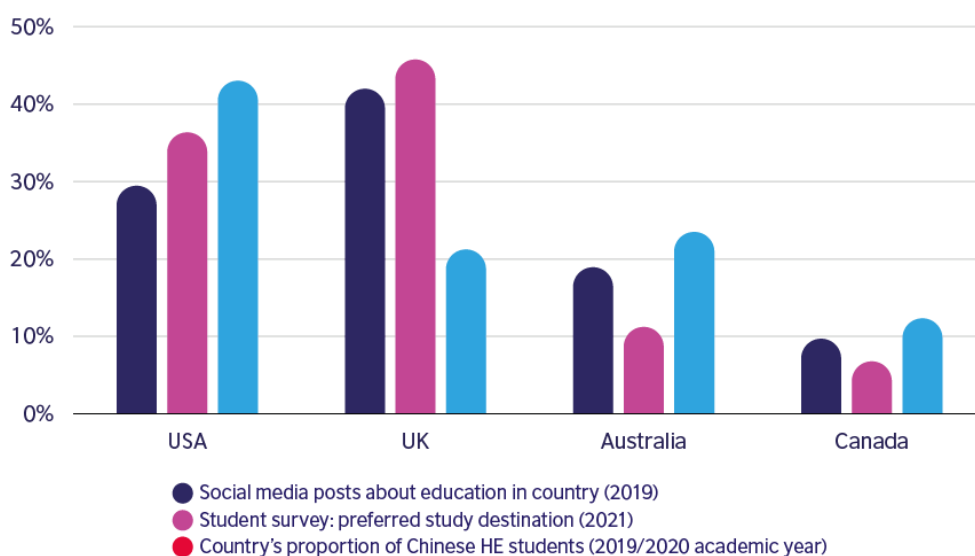
prominent in terms of cultural interest, which has made the country more likely to be seen as students' first choice at this early stage in the overseas study journey, giving the country an advantage over competitors.

3.10 Impact of initial country preferences on students' final study destination

The British Council's 2017 report on measuring the UK's cultural dividend in China showed that, among the four main Anglophone countries, the UK accounted for a 39 per cent share in discussion of education on Chinese social media, a 29 per cent share of surveyed students naming the country as their preferred study destination, but only a 18 per cent share of actual enrolled Chinese students.

A similar analysis based on the most recent available enrolment data shows that despite the UK's improvement on all three measures, the same general pattern applies. While there is no longer a fall-off from social media interest to self-reported student preference, the number of actual Chinese students in the UK is still noticeably below what would be expected from students' survey responses, while Australia and Canada both punch above their weight in this regard.

Figure 4.21: Students' interest in key destination countries vs actual market share



Base (social media posts): Social media posts mentioning education in the UK or other key English-speaking countries, November 2018 – October 2019

Question (student survey): "If you were to study overseas, which country would you be most interested in studying in?"

Base (student survey): Students who said they definitely wanted to study abroad or were considering it and chose one of these countries as their most-preferred destination (1,229 respondents (2019) / 903 respondents (2021))

Sources (student mobility): HESA (UK), IIE (US), AusTrade (Australia); British Council estimate based on data from StatCan and Immigration, Refugees & Citizenship Canada (Canada)

In some ways the UK's performance in terms of student recruitment is stronger than these figures may suggest. The UK attracts a greater share of postgraduate students, whose courses are shorter than those of undergraduates, while the UK's one-year master's degree programmes – which are seen as a major advantage when students are choosing where to study – mean that a student going to the UK stays in the country for

less time than one heading to other competitor countries, reducing total enrolment figures relative to new student recruitment.

However, this does not account for the whole of the difference, and this comparison illustrates that survey results measure interest at a very early stage of students' overseas study journey. As noted elsewhere in the report, the proportion of students who say they are considering studying abroad is several times higher than the number who do eventually go overseas for a higher education programme.

Focus group research shows that once students start to seriously engage with overseas university applications there are many other factors they take into account beyond their initial level of interest. Nevertheless, the UK does still gain an important advantage from Chinese students' attraction to the country's cultural output, as a student's initial overseas study interests can set the "default option" when considering study abroad and determine which countries' courses they consider as part of their decision, as well as inspiring the idea to study abroad in the first place.

5. CONCLUSIONS

The link between interest in overseas culture and attitudes towards overseas study continues to be strong

Research conducted for this report confirms the connection between cultural attitudes and overseas study found in the British Council's previous *Measuring the Cultural Dividend* report, released in 2017 based on research conducted in 2016. Chinese students who are interested or very interested in overseas culture were three times as likely to say they were considering studying abroad as those who were less interested in overseas culture. Meanwhile, among students who wanted to study abroad, those who said the UK was their favourite country in cultural terms were three times more likely to choose this country as their preferred study destination.

When asked directly about the importance of interest in a country's culture when choosing a study destination, only 42 per cent of prospective overseas students named this among the top three factors – but as with the findings five years ago, there was a strong connection between a student's preferred country in terms of culture and as a study destination even among the group that said this was not important to their decision.

Focus group research shows that this factor declines importance as students begin to engage more seriously with overseas university applications. Nevertheless, it continues to have an effect on study decisions through influencing the initial countries that students consider, setting the "default option", and affecting perceptions of factors such as the lifestyle a student can expect to experience while studying abroad in a particular country.

The last five years have seen major shifts in Chinese people's preferred countries in terms of culture and as study destinations

Focus group and survey research conducted in 2016 showed the US in a dominant position in terms of both culture and study, well ahead of the UK. By 2019 this situation had reversed, with the UK leading on both indicators in survey results.

The most likely explanation for this change is a shift in Chinese attitudes towards the US as a result of international politics, including the trade war between the two countries and highly publicised restrictions on US visas issued to Chinese students. Focus group discussions confirmed that many prospective overseas students had shifted their attention away from the United States, in some cases because of direct changes in policies that made it more difficult for them to study in the country but more commonly because of a more general level of concern about the country or fears about potential future policy changes.

Despite the large shift in the preferred study destinations listed by survey respondents, the change in their attitudes towards individual aspects of US culture was much smaller. When Chinese people are asked specifically about their attitude towards overseas media, celebrities, innovation or sports the US is still seen as more attractive than any

other country – perhaps showing that the underlying level of interest has changed less than surface-level preferences would imply.

Student mobility statistics confirm that the increased interest in UK study is having an effect on the number of Chinese students coming to the country. Between the 2016/17 and 2019/20 academic years the number of Chinese HE students studying in the UK increased by 45 per cent, and more recent data shows that the number of Chinese students applying to UK universities through UCAS had increased in January 2021 compared to a year earlier despite the influence of COVID-19.

More recently, surveys and focus groups conducted in early 2021 show that the level of interest in all Anglophone countries has declined, in terms of both culture and study – a trend which is almost certainly linked to the COVID-19 pandemic, although perceptions of the friendliness of local people in the US and Australia have also declined for other reasons.

Both the UK and US are seen as having handled COVID-19 poorly, affecting interest in study in both countries

Survey results clearly show that Chinese people are not impressed with either the UK or the US response to the COVID-19 pandemic. Respondents saying that the UK has handled the pandemic “poorly” or “very poorly” outnumbered those saying the opposite by 13 percentage points, while the perception of the US response is even more negative, with negative responses more than 4 times as common as positive ones.

There is a strong link between assessments of a country’s COVID-19 response and interest in studying in the country. After taking into account both the desire to study abroad and the likelihood of choosing a particular destination, people who feel that the UK has handled the pandemic well were almost twice as likely to want to study in the country as those who think the response has been poor. Students actively involved in applying for overseas study confirm that this is a major issue, but several commented that the main point of concern is not so much personal safety as the likelihood that they will be able to attend in-person classes in an overseas university.

Chinese interest in UK study may rebound in the short term, but long-term prospects are uncertain

Survey research has shown that the UK is the country most likely to be named as Chinese students’ preferred overseas study destination, while discussions with student focus groups confirm that there is still strong interest in both UK study and the UK more broadly. Students are optimistic about the prospects for studying abroad once the COVID-19 epidemic has been defeated, with students’ major worry being the availability of in-person classes rather than direct safety concerns.

On the other hand, negative perceptions formed during the pandemic may take some time to recede. The road to studying abroad can be long, and factors that affect interest in UK study at an early stage in a student’s decision-making process can make them less likely to choose the country later on. Nevertheless, while survey results showed that Chinese people had generally negative perceptions of the UK’s COVID-19 response, this

survey was carried out before the UK's implementation of a successful vaccination campaign which may have had a positive effect on Chinese attitudes.

The shift from interest in US study towards the UK could also be a point of concern. While the changes since 2016 have undoubtedly had a positive impact on the number of students choosing to study in the UK, they were largely driven by US-China politics, meaning that there is room for a rapid shift back towards US study if relations improve.

The importance of interest in overseas culture to overseas study decisions also brings new risks. While this is not yet reflected in surveys of Chinese people's overall level of cultural interest in the UK, focus group discussions showed that students were less likely to name UK content when asked about their favourite books, movies and TV shows, which may have an effect on interest in the UK in the longer run – particularly in younger generations.

A final concern for UK universities is the improving quality of domestic Chinese higher education, which is an area the Chinese government is investing large amounts of money. While cultural interest is one important factor in Chinese students' decisions to study in the UK, students were clear that this is a far less important issue than the quality of education they will receive, meaning that better options at home will make going abroad less attractive in comparison.

6. APPENDIX: SURVEY QUESTIONNAIRE

Part 1: Basic Information

1. What is your age in years? _____

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

- Male
- Female

3. Where do you currently live?

Province _____ *[List of provincial-level regions]*

City _____ *[List of cities, populated based on province]*

4. 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

5. Do you have any children? If so, what level(s) of education are your children currently studying (please choose all that apply) *[Multiple choice; choose any number]*

- Has not yet entered primary school
- Primary school
- Lower secondary school
- Upper secondary school
- Undergraduate level or above
- My children have all already completed their education
- I do not have any children

Part 2: Interest in Overseas Culture

6. 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

7. Aside from China, which two overseas countries do you find the most attractive in terms of culture?

Most attractive country *[Multiple choice; choose 1; randomised order]*

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

Second most attractive country *[Multiple choice; choose 1; randomised order]*

- Australia
- Canada

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

8. 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)

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

	<i>Very attractive</i>	<i>Attractive</i>	<i>Neutral / Unsure</i>	<i>Not very attractive</i>	<i>Unattractive</i>
Celebrities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brands / companies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Literature	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Media (such as music, film or TV)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friendliness of local people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology / Innovation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
History / traditional culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

	<i>Very attractive</i>	<i>Attractive</i>	<i>Neutral / Unsure</i>	<i>Not very attractive</i>	<i>Unattractive</i>
Celebrities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brands / companies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Literature	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Media (such as music, film or TV)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friendliness of local people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology / Innovation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
History / traditional culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q11. **[2021 only**]** Compared to one year ago (before the worldwide COVID-19 pandemic), how has your attitude towards overseas culture changed? *[Multiple choice; choose 1]*

- Much less interested
- Somewhat less interested
- No effect
- Somewhat more interested
- Much more interested

Part 3: Studying Overseas

[Students*]**

Q12A. Overall, how interested are you in studying overseas?

[Multiple choice; choose 1]

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

[Parents*]**

Q12B. What is your attitude towards your child studying overseas?

[Multiple choice; choose 1]

- I definitely want my child to study overseas
- Seriously considering sending my child to study overseas
- Potentially interested in my child studying overseas
- Not very interested in my child studying overseas
- I definitely don't want my child to study overseas

[Students interested in studying overseas**]**

Q13A. If you were to study overseas, which two foreign countries would you most prefer to study in? *[Write-in]*

Most preferred country _____
 Second-choice country _____

[Parents interested in child studying overseas**]**

Q13B. If your child were to study overseas, which two foreign countries would you most prefer they study in? *[Write-in]*

Most preferred country _____
 Second-choice country _____

[Students interested in studying overseas**]**

Q14A. 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 interested in their child studying overseas**]**

Q14B. 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 interested in studying overseas / interested in their child studying overseas**]**

Q15. Which of these factors are the most important when choosing a place to study overseas? (Please choose up to three options) *[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) _____

Q16. Thinking about the United Kingdom, how strongly do you agree with the following sentences? *[7x multiple choice; choose 1]*

	<i>Strongly agree</i>	<i>Somewhat agree</i>	<i>Neutral /Unsure</i>	<i>Somewhat disagree</i>	<i>Strongly disagree</i>
This country has high-quality education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This country is welcoming to overseas students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This country is a safe place to study	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Studying in this country is very expensive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am interested in the local culture of this country	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There are good opportunities for overseas students to work in this country after graduating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This country is an attractive place to live	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q17. Thinking about **[other country*]**, how strongly do you agree with the following sentences? [7x multiple choice; choose 1]

	<i>Strongly agree</i>	<i>Somewhat agree</i>	<i>Neutral /Unsure</i>	<i>Somewhat disagree</i>	<i>Strongly disagree</i>
This country has high-quality education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This country is welcoming to overseas students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This country is a safe place to study	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Studying in this country is very expensive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am interested in the local culture of this country	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There are good opportunities for overseas students to work in this country after graduating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This country is an attractive place to live	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q18. [2021 only**] Compared to one year ago (before the worldwide COVID-19 pandemic), how has your attitude towards overseas study changed? [Multiple choice; choose 1]

- Much less interested
- Somewhat less interested
- No change
- Somewhat more interested
- Much more interested

Part 4: Attitudes towards the UK

Q19. What is the first thing that comes to mind when you think about the United Kingdom? [Write-in]

Q20. What do you think is the UK's greatest strength or advantage? [Write-in]

Part 5: About You

Q21. 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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Other country*]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Anywhere else outside mainland China	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q22. [2021 only**] Are you interested in any of the following activities with these countries? [Multiple choice; choose any number]

	<i>Opportunities to work/do business with people and organisations from this country</i>	<i>Building contacts and talking more with people from this country</i>	<i>Visiting this country as a tourist</i>
UK	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Other country*]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Any other overseas country	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
None of the above	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q23. [2021 only**] How well do you feel the following countries have responded to the COVID-19 pandemic? [UK / Random country from Q10]

[Very poorly / Relatively poorly / Neither well nor poorly / Relatively well / Very well]

A. UK	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. [Other country*]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q24. 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]

- Below 10,000 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

** In Questions 10, 17, 21, 22 and 23, the “other country” was selected randomly from Australia, Canada, France, Germany, South Korea, Japan and the USA. Each of these five questions asked about the same randomly-selected country.*

*** Questions 11, 18, 22 and 23 were only asked in the 2021 survey round. All other questions were asked in both 2019 and 2021.*

**** Questions 12A to 15A (marked as “students”) were asked to all respondents currently in education. Questions 12B to 15B (marked as “parents”) were asked only to non-students who have children in education. These questions were not asked to non-students without children in education.*

***** Questions 13 to 15 were asked to students or parents who chose one of the first three answers to Question 12 (i.e. those who were at least “potentially interested” in studying abroad / having their child study abroad). These questions were not asked to respondents who described themselves as not very interested / not at all interested or to those who were neither students nor parents.*