



Measuring the cultural dividend

How does interest in overseas culture impact
Malaysian 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 analyses the link between Malaysian's interest in overseas culture and their desire to interact with overseas countries for study abroad, tourism or business. It is based on a combination of focus groups and large-scale surveys carried out in early 2021 as well as analysis of user-generated posts on social media. The report forms part of a series analysing attitudes in six different ASEAN countries.
- Malaysian people have a relatively high level of interest in overseas culture. Overall, 82 per cent of people described themselves as "very interested" or "somewhat interested" in overseas culture, ranking 4th among the six target countries – or 3rd when it comes to the proportion saying that they are "very interested". The most attractive aspects of overseas culture included food, history & traditional culture and innovation.
- Groups that were relatively more interested in overseas culture include wealthier Malaysians and those living in the central part of the country including the capital Kuala Lumpur. Female Malaysians are also somewhat more likely to express an interest in overseas culture, while students tended to be more interested than non-students in the same age range. COVID-19 does not appear to have affected Malaysians' interest in overseas culture, with few people saying that their level of interest had decreased over the previous 12 months.
- Although interest in overseas countries as a whole is high, interest in the UK specifically is much lower. When asked about their preferred overseas countries in terms of culture the majority of survey and focus group participants talked about Japan or Korea, with only 6 per cent of survey respondents naming the UK. Most people did not have strong impressions of UK entertainment media and had little knowledge of British innovation. Several participants – particularly in older age groups – saw the UK as having "gentlemen culture", with British people described as polite, softly-spoken and well-dressed; however, they also saw British people as having less emotional connection to others.
- One area where the UK did perform very well was the country's education system. Malaysians had strong associations between education and the UK and rated the country as having an excellent higher education system. Among students who said they wanted to study abroad, the UK was the most likely country to be named as Malaysians' first-choice destination.
- This is connected to a strong regard for overseas education and a high level of interest in studying abroad among Malaysian students. Overall, more than two thirds of student respondents said that they were at least somewhat interested in studying abroad, with more than half describing themselves as "very interested" – with even higher proportions among higher-income households and residents of the area around Kuala Lumpur. However, it should be noted that initial interest is only the very first stage of overseas study consideration and the proportion of

Malaysians who actually go on to study abroad is far lower. A large majority of these potential students are likely to change their mind after considering practical factors like costs and the amount of time spent abroad.

- Malaysians do not describe culture as an important aspect of their study decisions when asked about this directly, but correlations between survey responses reveal that students who find overseas culture interesting are also substantially more likely to want to study abroad. Furthermore, even among students who said that culture was not important to their decision, there were strong links between a student's preferred overseas countries in terms of culture and the places they want to study. Students who preferred UK culture were almost three times as likely to name the UK as their first-choice destination compared to the population as a whole.
- Interest in tourism was strong and attitudes towards future travel do not appear to have been greatly affected by COVID – Malaysians have a strong appetite for future overseas travel after the pandemic is defeated. A large majority described themselves as potentially interested in visiting the UK, and among those that said they preferred UK culture the proportion is even higher. While the effect of cultural interest on doing business with overseas countries was relatively small, cultural preferences have a much larger effect on Malaysians' attitudes towards living and working overseas for a longer period.
- Despite the UK's strong share of Malaysian outbound students, the country's relatively weak position in terms of Malaysians' cultural preferences is likely affecting demand for UK study. While most Malaysians do not consciously see culture as having a large effect on their overseas study decisions, the results of this research show that it does have a significant effect on their initial country preferences, which in turn can affect students' information search process and the extent to which they explore overseas study at all. Cultural preferences also have a small but significant effect on interest in doing business with the UK, meaning that an improvement in Malaysian attitudes towards UK culture could lead to more business opportunities in the future.

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?

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. Cultural interest is also often described as important for other forms of interaction with overseas countries such as tourism or business cooperation. 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.

The current report is one of a series that extends and expand this research to cover six ASEAN countries: Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam. This research is important because of the significant role ASEAN's outbound students have played in the UK's HE sector. Shifts in power and structure of geopolitics, demographic changes and improving HE quality at home will likely cause growth in ASEAN's international student mobility to slow in near future, with recruitment in these countries subsequently becoming more competitive.

Beyond analysing the effect of cultural interest on education, the reports also extend the scope of the research to also cover its impact on other forms of interaction with overseas countries, including interest in tourism, doing business with overseas countries, and living and working abroad for an extended period. This will help to understand the effect that shifts in perception of the UK may have on these forms of interaction and the opportunities they create. The research also attempts to understand how attitudes have changed over the period from early 2020 to early 2021 – covering the first part of the international Covid-19 pandemic – and how these changes may affect future trends.

The research in the current study draws on from several sources:

- Analysis of user-generated posts on social media, especially Twitter posts as well as public posts on other networks including forums, blogs, comments on relevant news sites and other sources.
- A large-scale online survey distributed in early 2021.
- Online focus groups with Malaysian students planning to study abroad, returned alumni, parents and young people, conducted in early 2021.
- Previously published research and studies of 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 period from June 2019 to March 2021. 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 57,397 posts – the majority of which were on Twitter – that mentioned the UK, US or China in the context of culture, education, work & immigration or personal wellbeing.

Quantitative surveys were distributed in the first quarter of 2021 through an online platform. Users were targeted based on a geographically representative sample of Malaysians, taking into account factors such as region, gender, age and ethnic group. A total of 1,800 responses were received in Malaysia, as part of a total of 13,200 responses across all six target ASEAN countries.

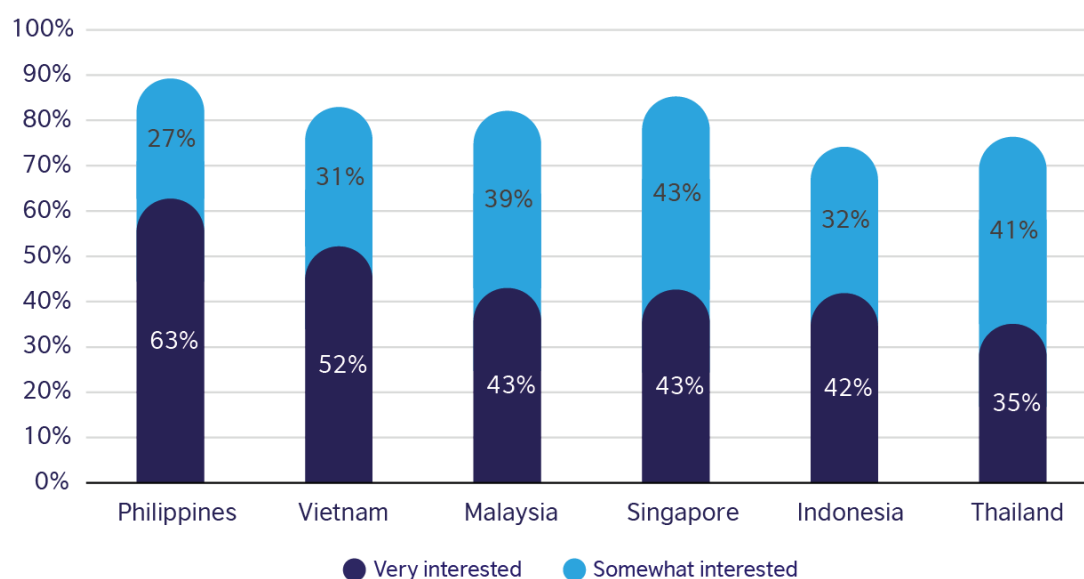
Four separate focus groups were conducted with Malaysians in late January 2021. Given the pandemic situation this research was conducted online, without limiting the participants to Malaysians from any specific region.

3. INTEREST IN OVERSEAS CULTURE

3.1 Level of interest in overseas culture

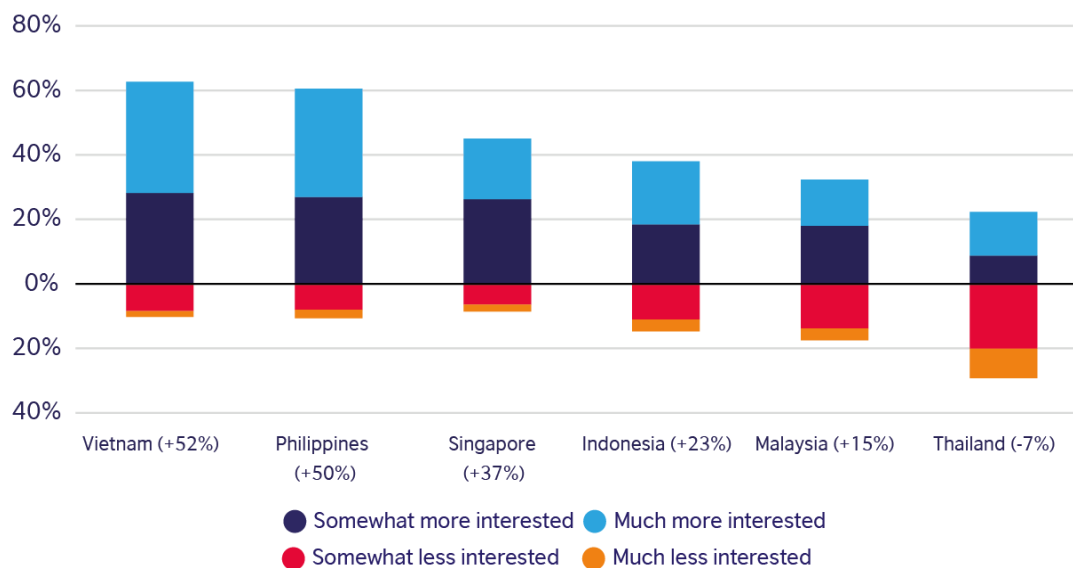
Overall, Malaysian people tended to describe themselves as interested in overseas culture and interacting with overseas countries. Survey results found that 82 per cent of Malaysian respondents described themselves as “very interested” or “somewhat interested” when they were asked a broad question about their level of interest in overseas culture, with 43 per cent choosing the “very interested” option. This places Malaysia 3rd among the six countries covered by this series of reports, behind the Philippines and Vietnam.

Figure 1: Interest in overseas culture, Malaysia vs other ASEAN countries



Base: All respondents (1,800 respondents in Malaysia / 13,200 respondents total)

The surveys – carried out in early 2021 – also asked about the change in respondents’ attitudes towards overseas culture compared to 12 months earlier. Despite this period covering the start of the Covid-19 pandemic, results were relatively positive – almost a third of respondents said that they had become much more interested or somewhat more interested in overseas culture over the last year, compared to only 18 per cent who said the opposite. However this was the second-smallest net increase compared to other countries covered in this research, ahead of only Thailand.

Figure 2: Change in interest in overseas culture over the previous 12 months, Malaysia vs other ASEAN countries

Base: All respondents (1,800 respondents in Malaysia / 13,200 respondents total)

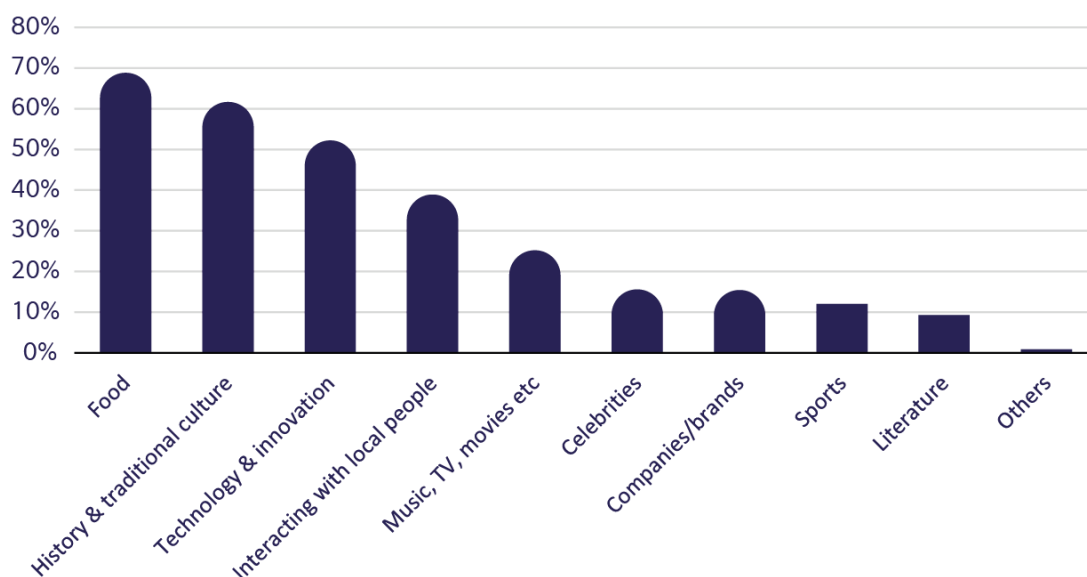
In-depth discussions with Malaysian parents and young people, as well as groups of prospective overseas students and returned alumni, showed that Malaysians' strongest perceptions of overseas culture centre around social behaviours. When asked what they associate with overseas culture, several focus group participants discussed behaviour and manners, often giving Japan as an example which they associated with helpful people and care for the environment. Life values and thinking / mindset was also seen as a major aspect of culture, including work-life balance and living quality. Meanwhile traditional customs were also seen as an important aspect of culture, with several participants talking about religion or festivals; other participants mentioned food and drink as an important element of a country's culture.

When asked about the aspects of overseas culture they found most interesting, Malaysians expressed the highest level of interest in food – 69 per cent of respondents chose this among the top three aspects of overseas culture that they were interested in. Meanwhile history and traditional culture was chosen by 62 per cent of respondents, followed by technology and innovation at 52 per cent.

Among the nine areas listed¹, literature attracted the least interest with only 12 per cent of Malaysians describing this as an area of interest. Some aspects, such as interaction with local people, history & traditional culture and literature, were relatively more popular among respondents that described themselves as interested in overseas culture, while others, including media (music, film and TV), technology and sports were more likely to be named as top-3 aspects among people who said they were less interested in overseas culture.

¹ Nine aspects of overseas culture were listed in the survey: Celebrities; Companies / brands; Food; History & traditional culture; Interacting with local people; Literature; Popular media (music, TV, movies etc); Sports; and Technology & innovation. An additional write-in option was only used by a small proportion of respondents.

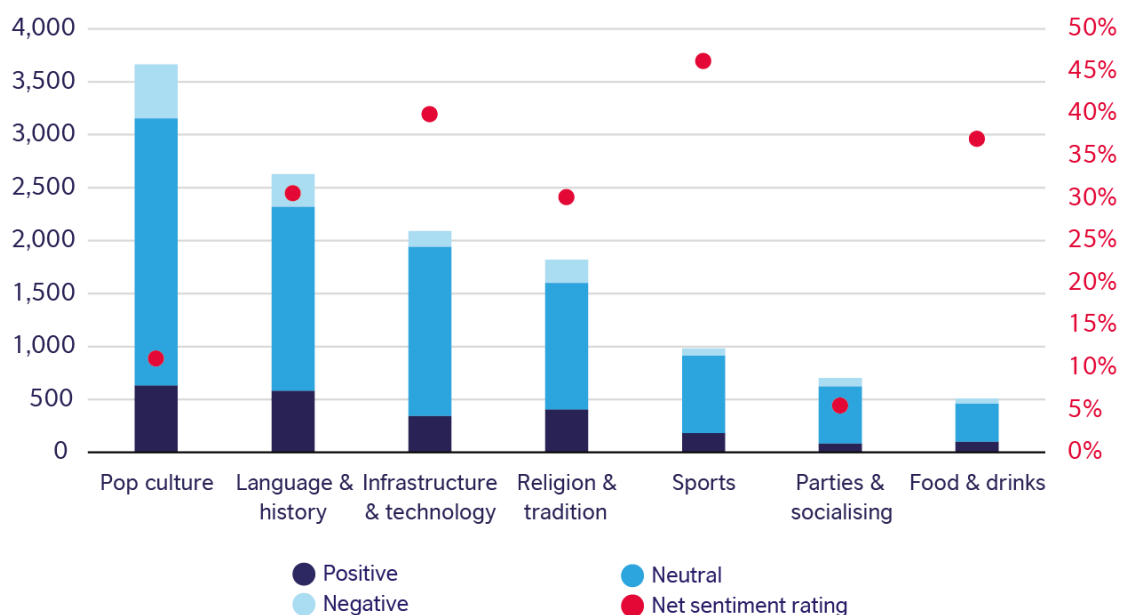
Figure 3: Interest in different aspects of overseas culture



Base: All respondents in Malaysia (1,800 respondents)

This distribution of interests was not entirely supported by social media analysis. A breakdown of posts from Malaysian internet users discussing three major overseas countries – the UK, US and China – shows that the top area of culture-related discussion was language and history, followed by media and popular culture. Food-related discussion was much less popular, falling behind not only these most popular subject areas but also other areas which were less common in survey results such as sports or infrastructure & technology.

Figure 4: Social media post volume and net sentiment ratio by aspect of overseas culture



Base: Social media posts discussing the UK, US or China in terms of culture, June 2019 – March 2021

More detail on attitudes towards specific countries' culture can be found in Section 3.3.

3.2 Factors affecting interest in overseas culture

A closer look at survey results shows that self-reported interest in overseas culture varies by a number of different demographic factors. Gender, age and ethnic group all had an effect on how likely a person is to say that they are interested in overseas culture, while the impact of household income was particularly strong.

Analysis by gender shows that female Malaysians are slightly more likely to express an interest in overseas culture than their male counterparts. Overall, 85 per cent of female respondents described themselves as at least somewhat interested in overseas culture, with 47 per cent saying that they were “very interested” – compared to 79 and 39 per cent respectively among male respondents.

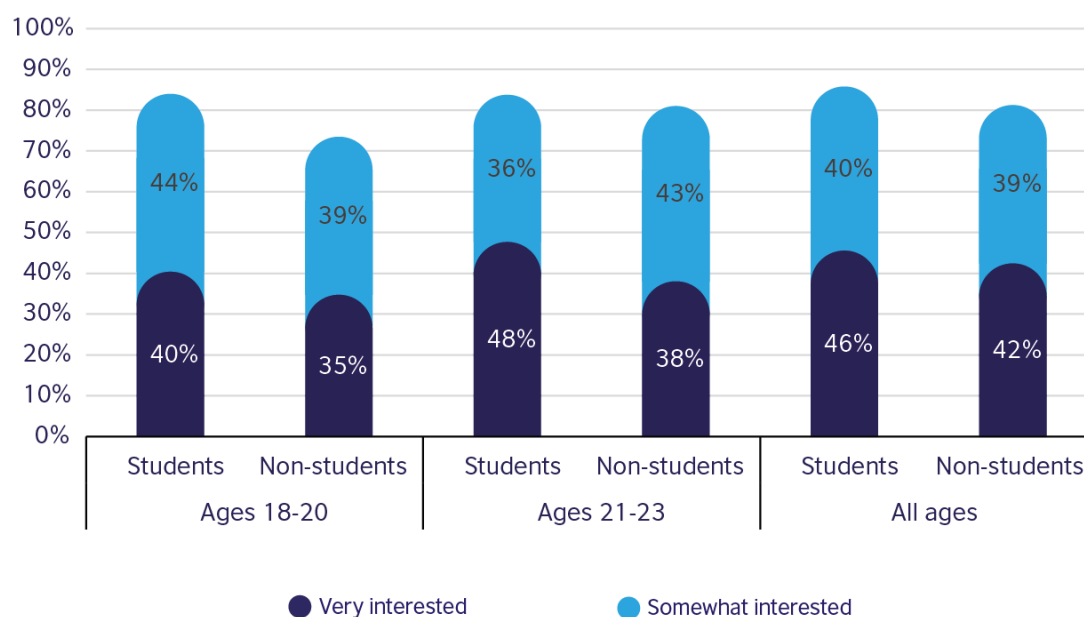
Figure 5: Interest in overseas culture by gender



Base: All respondents in Malaysia (1,800 respondents)

Variation by age was less consistent. The highest level of cultural interest appeared among both the youngest and oldest Malaysians, while those in their 20s and 30s were less likely to express this interest, but these differences were relatively small and most were not statistically significant.

Students also tend to be somewhat more interested in overseas culture compared to non-students of the same age. Among respondents in the 18-20 age range, 24 per cent of students described themselves as “very interested” in overseas culture compared to only 10 per cent of non-students. In the 21-23 age range, students were more likely to describe themselves as both very interested and as at least somewhat interested – a pattern which also applied to the overall survey pool.

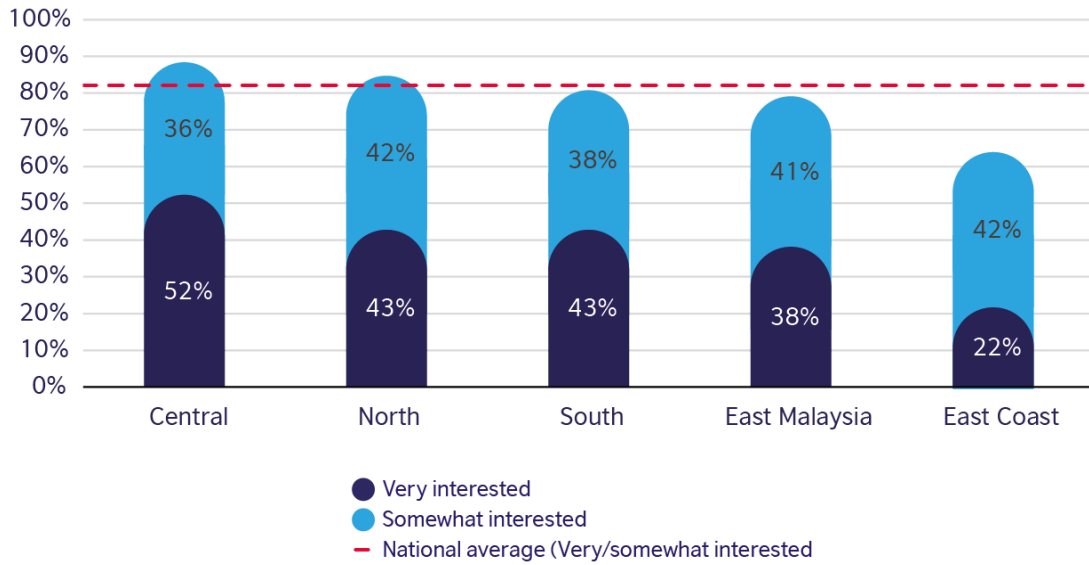
Figure 6: Interest in overseas culture by age and student status

Base: All respondents in Malaysia (1,800 respondents)

Note: Comparisons for age groups above 23 and below 18 are not shown, due to low numbers of student and non-student respondents respectively.

A regional breakdown of interest in overseas culture shows that respondents in central Malaysia – consisting of the capital Kuala Lumpur and surrounding Selangor state – were the most likely to describe themselves as interested in overseas culture. Meanwhile respondents on the East coast of peninsular Malaysia, including Kuantan, Kota Bharu and Kuala Terengganu, were noticeably less likely to express an interest than those in other parts of the country. Looking at the individual state level, the relatively high level of interest in the North of the country was largely driven by Penang, where the proportion of respondents describing themselves as interested in overseas culture was similar to the Central region.

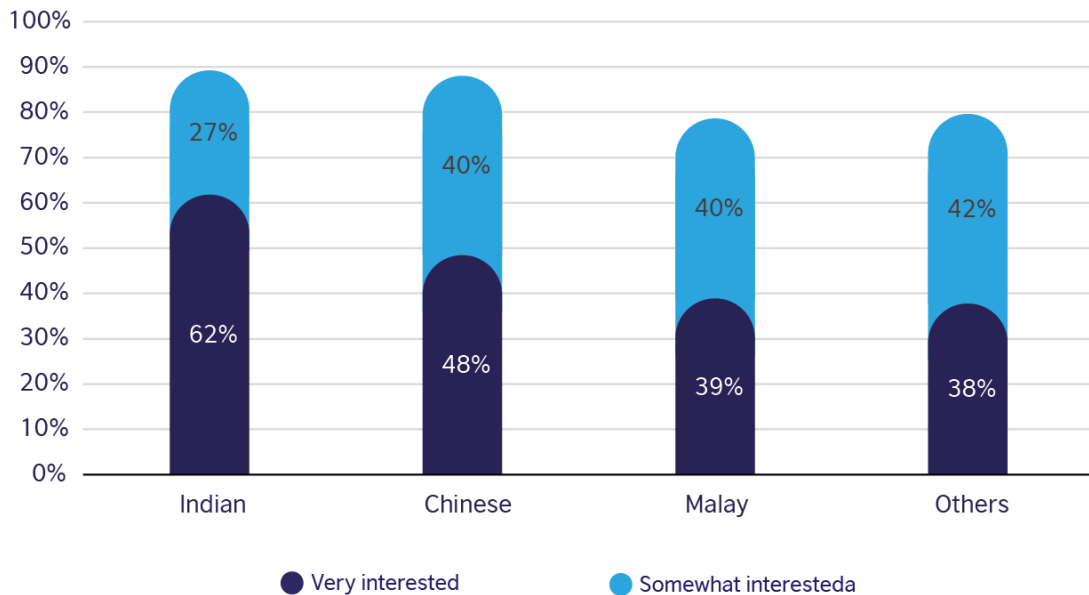
Figure 7: Interest in overseas culture by region



Base: All respondents in Malaysia (1,800 respondents)

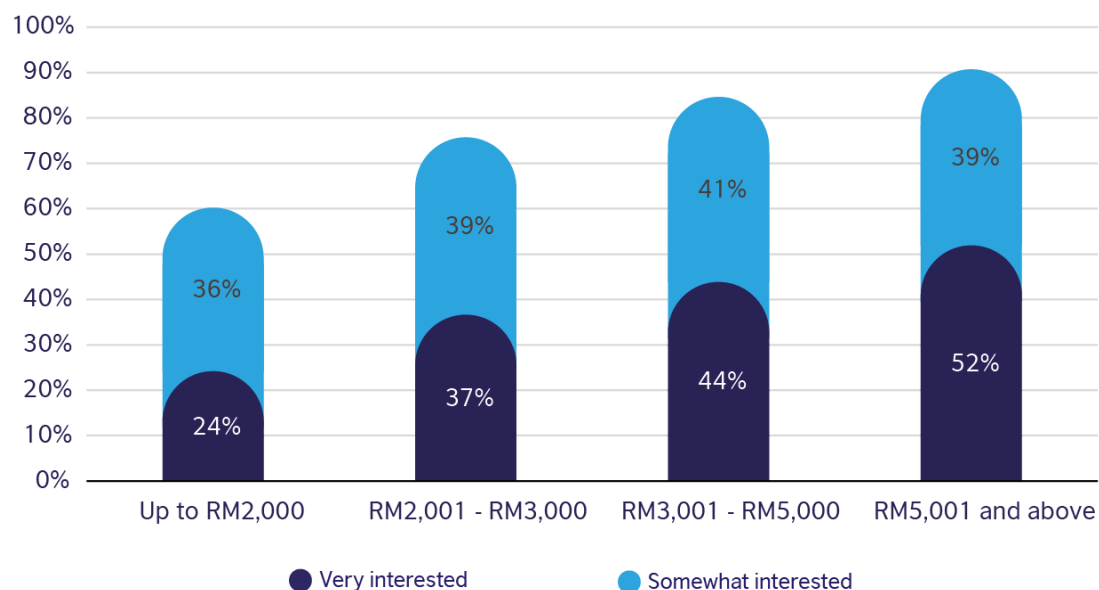
There were also moderate differences between ethnic groups in Malaysia. Ethnic Chinese Malaysians and ethnic Indian Malaysians were both somewhat more likely than Malays to say that they were interested in overseas culture – a difference which was also reflected in their attitudes towards a wide variety of overseas countries.

Figure 8: Interest in overseas culture by ethnic group



Base: All respondents in Malaysia (1,800 respondents)

A final indicator of interest in overseas culture is household income, with a strong link between increasing wealth and the likelihood of giving a positive answer. More than 90 per cent of respondents with household income above RM 5,000 (£860) per month said that they were interested or very interested in overseas culture, compared to only around 60 per cent of those earning RM 2,000 (£340) per month or below.

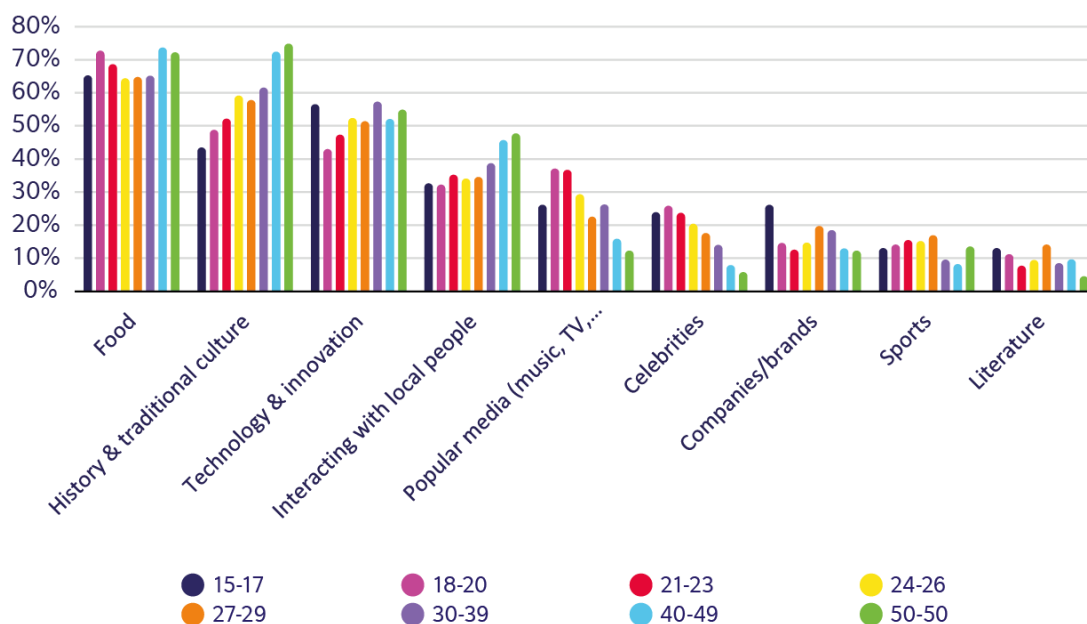
Figure 9: Interest in overseas culture by monthly household income

Base: All respondents in Malaysia (1,800 respondents)

As noted in the previous section, survey participants were also asked about the extent to which their attitudes had changed over the last year. Age had a very strong effect here, with younger groups much more likely to say that their level of interest had increased over the last year despite the Covid-19 pandemic. Most other demographic factors had relatively little effect.²

Age had a much clearer effect on the aspects of overseas culture that Malaysians were interested in than it did on overall interest in overseas culture. Some topics – including celebrities and popular media – were much more attractive to younger people, while interest in history & traditional culture and interaction with local people grew more popular with age.

² As noted in previous sections, the survey was conducted in early 2021

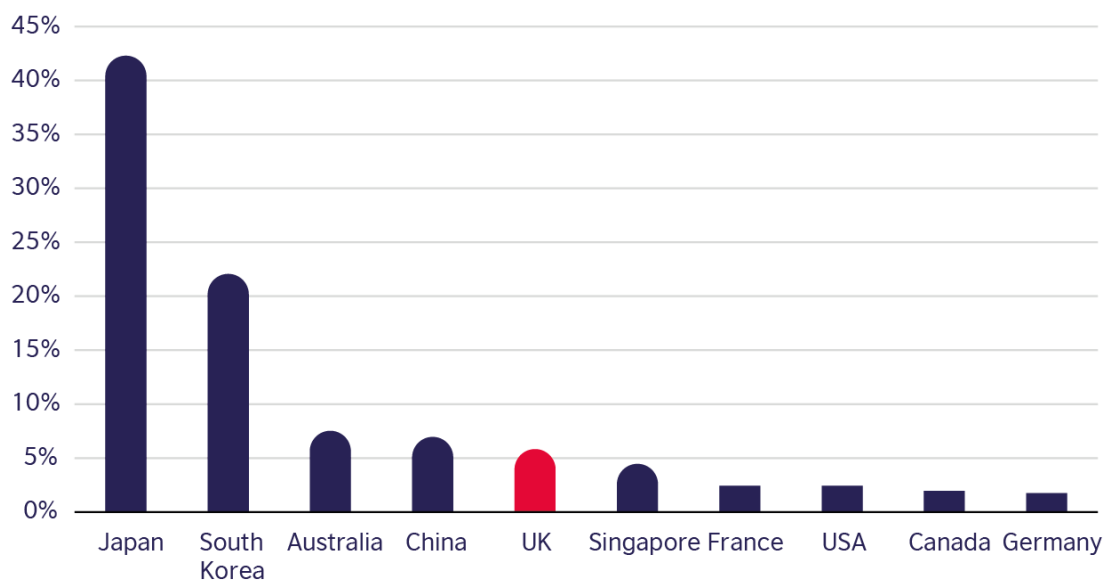
Figure 10: Interest in different aspects of overseas culture by age

Base: All respondents in Malaysia (1,800 respondents)

Gender also had an effect on interest in some aspects of overseas culture, most notably sports – which are four times as popular among men as among women – and celebrities, who women are nearly twice as likely to name among the top three aspects of overseas culture that they are interested in. Meanwhile income also had a strong effect, with wealthier Malaysians being more interested in food, history & traditional culture and interacting with local people while those with lower incomes were more likely to say they were interested in overseas media, celebrities and sports.

3.3 Interest in specific overseas countries' culture

When asked to name their preferred overseas country in terms of culture, Japan stood out as the clear leader. Among survey respondents who said they were interested or very interested in overseas culture, 42 per cent said that they saw Japan as the most interesting country in cultural terms – almost twice as many as the 22 per cent who named South Korea. In contrast the UK stood in 5th place with only 6 per cent of respondents saying that this country had the most attractive culture.

Figure 11: Preferred overseas country in terms of culture

Base: Respondents at least somewhat interested in overseas culture (1,478 respondents)

Japan was also the country most commonly described as attractive in focus group discussions. Japan was described as having a beautiful and clean environment, good food, respectful and hard-working people, offering a good living environment, and being a “well developed and advanced nation” with many famous high-technology brands. Meanwhile Korea was also seen as an advanced developed country, as well as being highly regarded for its pop music and TV dramas which were seen as more appealing than local content. Korean culture appealed particularly to young people, who saw Korean media content’s strong social media presence and the country’s stylish and attractive celebrities as particularly appealing.

There was another large gap between the second and third placed countries with Australia, the most likely Anglophone country to be seen as having the most-interesting overseas culture, only chosen by 8 per cent of respondents. Focus group participants described Australia as “laid back”, “less-stressful” and “peaceful and serene”, saying that it offered an attractive lifestyle; some also mentioned Australian universities.

China had a similar level of preference, with around 7 per cent of survey respondents choosing this as the most attractive overseas country in terms of culture. This country was seen by focus group participants as developing rapidly in terms of technology and innovation, with some even saying that China was now the leading country worldwide in this area. The Chinese government was seen as a major driver of this growth.

While Taiwan was not included in the list of survey options, it was brought up by participants in multiple focus groups. Taiwan was seen as having many of the same advantages as Japan in terms of lifestyle and the characteristics of the population, while also being Chinese speaking which appealed to Chinese-Malaysians; music from Taiwan was also well regarded for this reason.

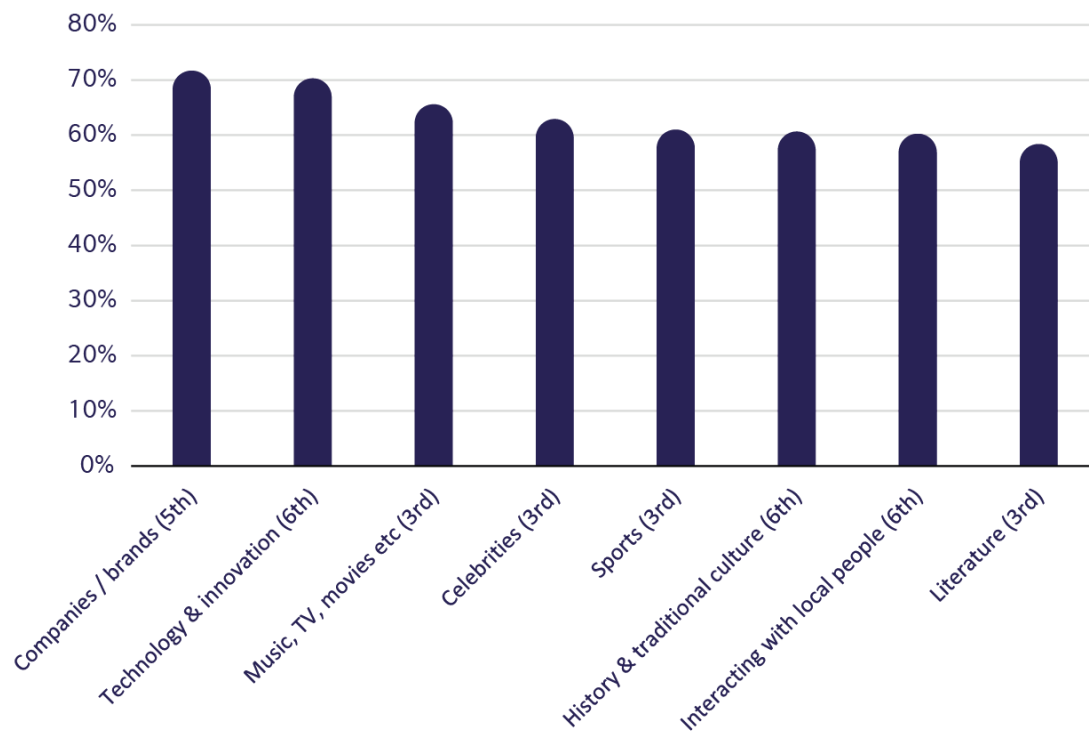
As with survey respondents, most focus group participants did not describe the UK as their favourite overseas country in terms of culture. However, attitudes were still relatively favourable – in general the UK is seen as developed, civilised and with a strong education system, but the country was not brought up unprompted when focus groups were asked about the countries that were strongest in terms of media or technological innovation.

When asked specifically about these questions focus group participants did not have strong impressions of UK entertainment media. Most could not distinguish between British and American content, with one young person commenting that UK musicians “*will be part of US Billboard so it’s more or less the same*”. Most also had little knowledge of the UK’s technology sector, describing the country as being less innovative than the US or China or being conservative and living in the past.

Other countries were named by even fewer survey respondents. Only two per cent said that the US was the overseas country whose culture they were most interested in, although focus group participants were comparatively more likely to talk about American movies, music and TV series as well as the country’s technological and economic strength. France, Canada and Germany, all of which were also included in the survey, each also attracted only two per cent of respondents.

When survey respondents were asked about countries’ attractiveness in terms of specific aspects of overseas culture, Japan and Korea again performed very well. Japan was the country that the highest proportion of respondents described as attractive or very attractive in four of the eight broad areas covered in the survey: Companies and brands, interaction with local people, technology and innovation, and history and traditional culture. Meanwhile South Korea was seen as the most attractive country in terms of celebrities and media (music, movies and TV), in both cases beating the US by a substantial margin.

The UK’s performance on this question was again relatively unimpressive. The country was neither the leader nor the runner up in terms of the proportion of Malaysians rating the country as attractive in terms of any of the eight aspects of overseas culture asked about in the survey, although the country did come a relatively close third in literature (behind China and Japan) and sports (behind Germany and the US), and a more distant third in terms of its celebrities and media.

Figure 12: Attractiveness of the UK in terms of different aspects of culture

Base: All respondents in Malaysia (1,800 respondents)

In the chart above, the low proportion of respondents listing the UK as attractive in terms of literature does not necessarily mean that the country performs poorly in this region – if measured relative to other countries this is actually the UK’s strongest field. Instead this reflects Malaysians’ relatively low level of interest in overseas literature compared with other aspects of overseas culture such as TV and films.

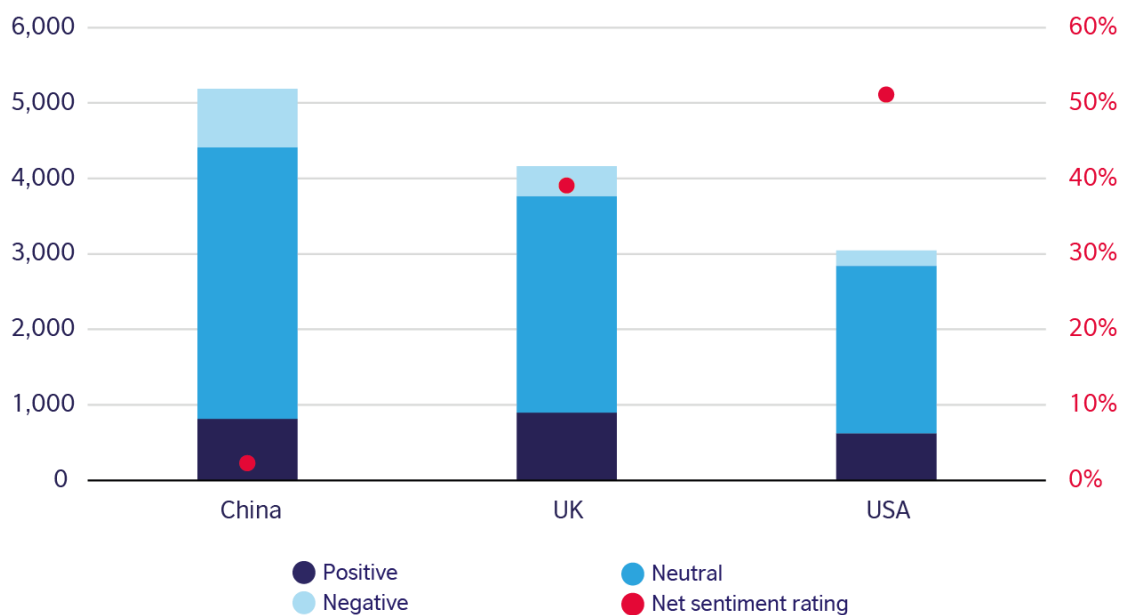
Social media analysis compared discussion of UK culture to two important competitor countries: China and the United States, with discussion separated into seven broad fields.

Aspect of culture	Description
Language & History	English/Chinese as a necessity/skill for Malaysians; History of UK/USA/China in context of its cultural value/prospects
Pop Culture	Arts, Films, Music, Celebrities, Fashion, etc. that are of intrigue and representative of the destination country
Infrastructure & Technology	Opportunities, amenities, comforts, modernity, public systems
Religion & Tradition	Religious expression, local traditions, folk culture, festivals, heritage

Sports	Sports clubs/teams & sporting culture
Parties & Socializing	Socializing and networking in a new society; meeting locals
Food & Drinks	Local cuisines, nostalgia about Malaysian food; drinking culture

In terms of overall traffic, UK culture accounted for more social media posts than US culture but less than China; however, the number of posts analysed as expressing positive sentiments about UK culture was higher than that for either the US or China. The net sentiment ratio (NSR)³ of posts about the UK was +39 per cent, lower than the +51 per cent score of posts related to the US but substantially higher than China’s +2 per cent score.

Figure 13: Social media post volume and net sentiment ratio by country



Looking more closely at the particular fields, the largest proportion of UK-related posts are related to the country’s language and history, followed by popular culture (including movies, music etc) infrastructure & technology and tradition & religion. While China attracts more discussion in almost all fields aside from popular culture and sports, the net sentiment ratio of posts related to the UK is substantially more positive in all areas other than food. Meanwhile the US attracts a lower volume of posts in all fields but the share of these posts expressing positive sentiment is somewhat higher overall.

³ NSR is defined as (the number of positive posts minus the number of negative posts) divided by (the number of positive plus negative posts)

Figure 14: Social media post volume and net sentiment ratio by country and aspect of culture

3.4 Strengths and weaknesses of different overseas countries

When asked about their perceptions of the UK, focus group participants mainly described it as a developed country with a strong economy and a hub for business and finance.

They also saw the UK as having particularly strong education institutions, with world-renowned universities which teach students to be creative, strategic and good communicators. Those who have experience dealing with UK graduates attest to its better education quality, describing UK graduates as having stronger mindset with good critical thinking skills as compared to local Malaysian graduates.

Analysis of social media traffic supports this impression. Comparing Malaysian's social media posts about education in the UK, US and China, the UK stands out by having both the highest volume of total posts and, by an even larger margin, the highest volume of posts with positive sentiment. Attitudes towards overseas education are discussed in more detail in Section 4.1.

Several participants – particularly in older age groups – saw the UK as having “gentlemen culture”, with British people described as polite, softly-spoken and well-dressed; however they also saw British people as having less emotional connection to others and being somewhat arrogant.

Older participants also tended to have a positive attitude towards the UK's contribution towards Malaysia's development during the colonial period. In comparison this was a less common attitude among young people and social media posts expressed more

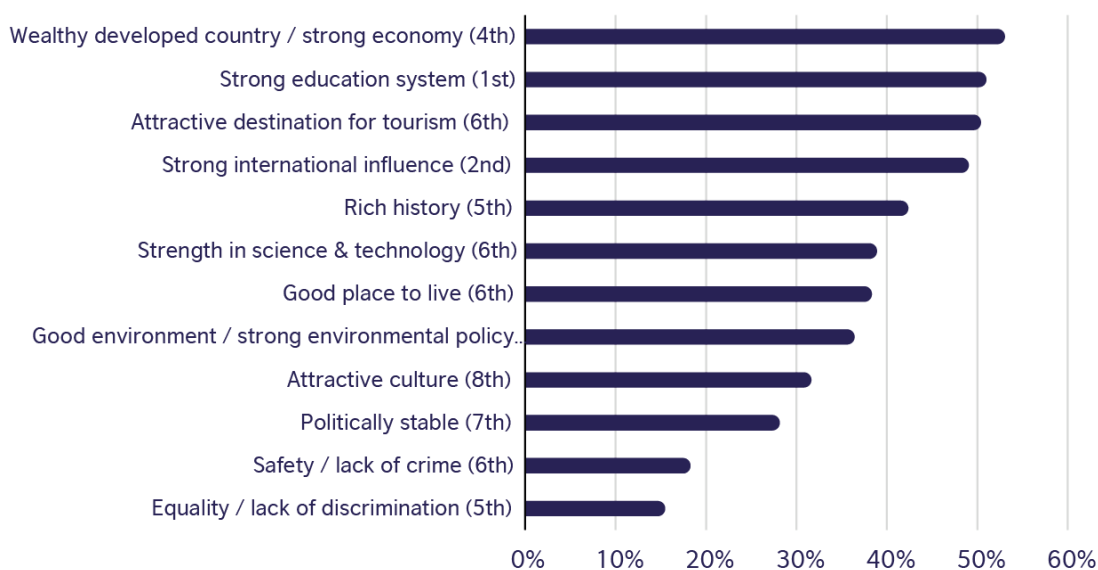
negative attitudes towards this period of history. Some focus group participants also mentioned concerns about racism or anti-Muslim sentiment in the UK.

Focus group participants did not have strong impressions of UK entertainment media. Most could not distinguish between British and American content, with one young person commenting that UK musicians “*will be part of US Billboard so it’s more or less the same*”. Most also had little knowledge of the UK’s technology sector, describing the country as being less innovative than the US or China or being conservative and living in the past.

In terms of lifestyle, some Malaysians commented that the UK has a relatively laid back lifestyle, meaning that the work environment may not be as challenging or exciting as some other overseas countries.

When asked to choose several countries’ strengths and weaknesses from a list, respondents were most likely to say that the UK was a wealthy developed country, that it had a strong education system, and that it was attractive for tourism and had a strong international influence. The UK was more likely than any of the nine comparator countries to be described as having a strong education system, while it was the second most likely (behind the US) to be rated as having a strong international influence.

Figure 15: Perceptions of UK strengths



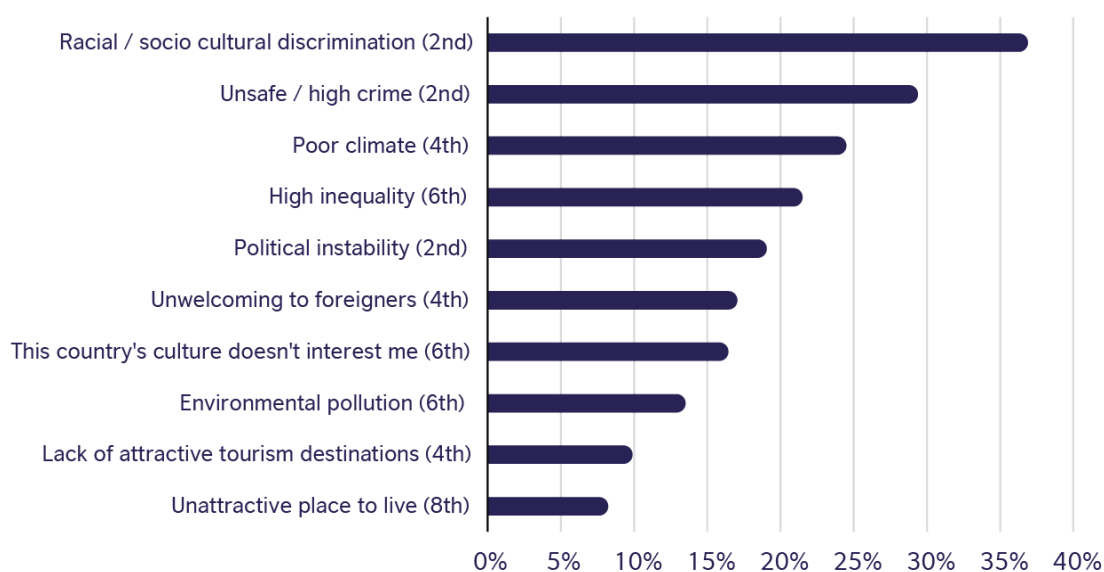
Base: All respondents in Malaysia (1,800 respondents)

In contrast Japan was rated top in four categories – strength in science and technology, attractive culture, safety, and good environment. The US and Canada were the most likely to be described as having strengths in two categories each: the US performed the most strongly on economic strength and international influence, while Canada was the country most likely to be seen as having strengths in political stability and lack of discrimination. Three other countries each led in a single category: China was the most likely to be described as having advantages in terms of its history; South Korea was described by the largest number of respondents as being an attractive tourism

destination; and Australia was the country that the largest number of survey participants thought would be a good place to live.

Looking at the UK's disadvantages, survey respondents were most likely to say that the UK had problems with discrimination and safety – in both cases being the second most likely country to be described in that way behind the US. The UK was also the second most likely overseas country to be described as politically unstable, again behind the US, although in this case the proportion of respondents giving this answer was still relatively low. The least-chosen UK weakness was “unattractive place to live”, with only 8 per cent of Malaysians saying that this applied to the UK; China was the country most likely to be described in this way.

Figure 16: Perceptions of UK weaknesses



Base: All respondents in Malaysia (1,800 respondents)

3.5 Perceptions of people from different countries

When asked to describe people from the UK, Malaysian focus group participants talked about the country as civilised with a “gentlemen culture”. British people were seen as soft-spoken with polite manners as well as being well-presented. This attitude was particularly pronounced among older Malaysians; while some younger people also had similar impressions this was less common among the younger groups.

Malaysians also saw British people as independent and self-sufficient, preferring not to rely on others. But others described this in more negative ways, saying that people from the UK lacked human and emotional connections and were self-centred, arrogant or narrow minded. One focus group participant described British people as racist, saying that “I talked to my friends who have been to UK and US, they told me so, they faced a lot of racism when they are in UK”.

In contrast, the country whose people focus group participants had the most positive impressions of was Japan, whose population was seen as peaceful and respectful.

Survey respondents were also asked about their perceptions of British people. Among 12 statements, the most commonly agreed with were that people from the UK are proud of their country (54 per cent) and friendly (44 per cent) – but compared to nine other countries, the UK was in the middle of the pack on both of these questions.

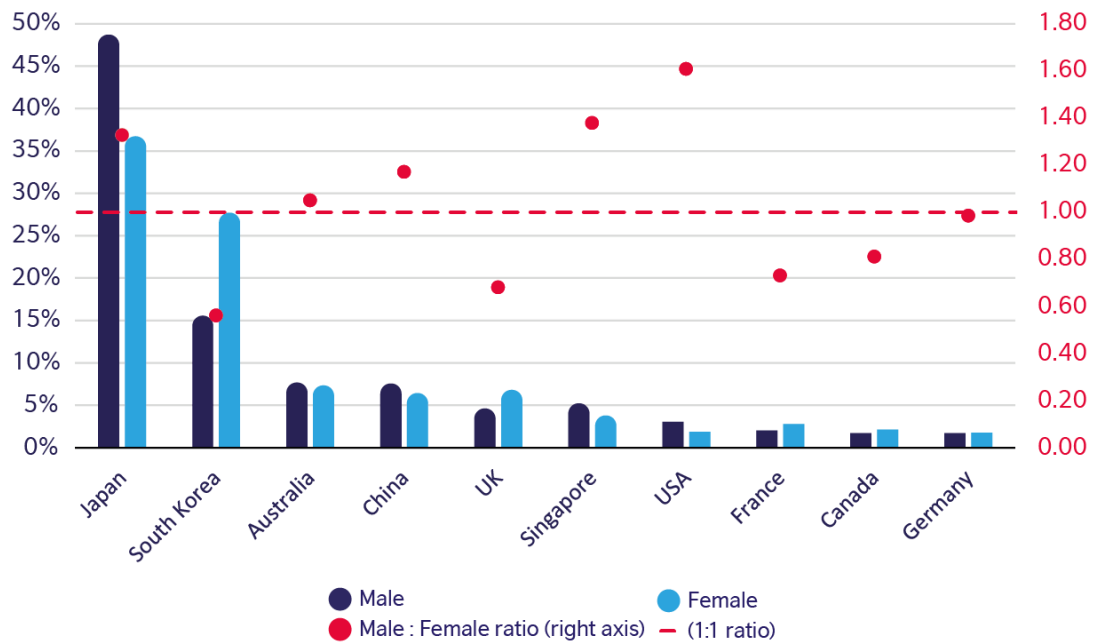
The aspect of personality on which the UK stood out furthest compared to other countries was the question of whether British people were “hard-working”. Only 24 per cent of Malaysians agreed, fewer than those who said the same about any other country; in contrast 75 per cent thought that Japanese people were hard-working and 64 per cent said the same about Chinese. French people and other Anglophone countries were also rated poorly on this aspect.

3.6 Factors affecting interest in different countries

There are clear gender differences between the people who say they are interested in the culture of particular countries. While Japan was identified as the country with the most attractive culture by both genders, the proportion giving this answer varied substantially: the country was named by almost half of the male respondents that said they were interested or very interested in overseas culture, but only 37 per cent of females. There was an even larger relative gap in interest in Korean culture, which was almost twice as likely to be preferred by female respondents – although even in the male group this was the clear second-favourite country overall.

Preference for the UK also varied strongly by gender. 7 per cent of female respondents saw the UK as having the most attractive overseas culture, compared to only 5 per cent of male respondents.

Aside from Korea the country with the largest difference in preferences by gender was the US, with male Malaysians being 61 per cent more likely to say they preferred the country’s culture compared to females.

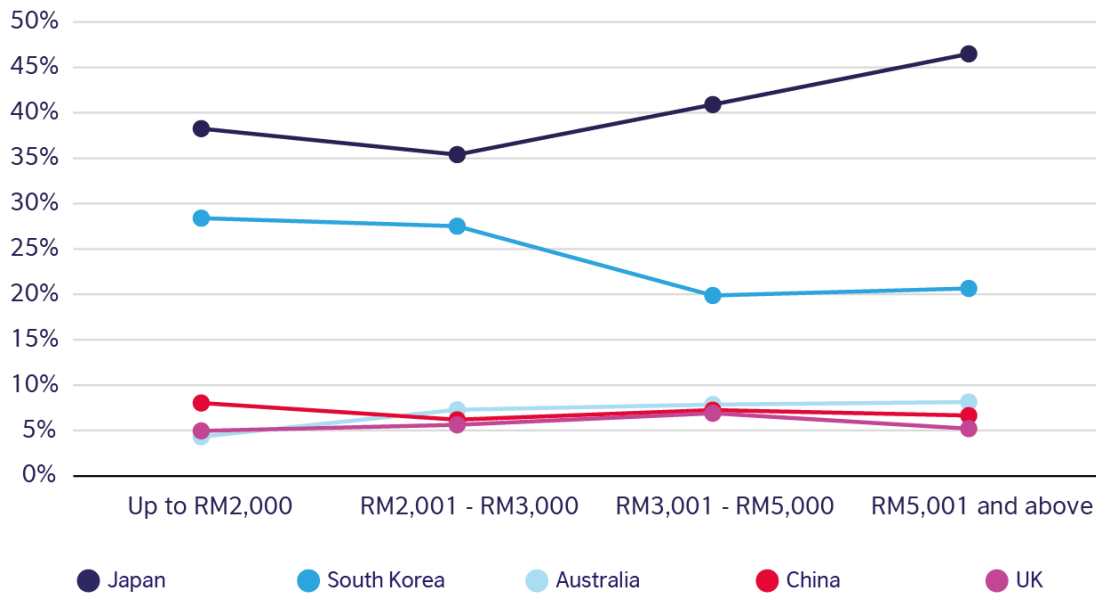
Figure 17: Preferred overseas country in terms of culture, by gender

Base: Respondents at least somewhat interested in overseas culture (1,478 respondents)

Breaking down the data by age shows that preference for the UK seems to be slightly stronger among people in their teens to mid 20s, while people in younger age groups also have a much stronger preference for Korean culture. Japan remains the most popular country with survey respondents of all ages but to a greater extent among older age groups, while Australia becomes more popular as respondent age increases.

While the stronger preference for Korean culture among young people matched our findings in focus groups, the same was not necessarily true about preference for the UK. On the contrary, older people were more likely to talk about the UK's "gentlemen culture" and have positive impressions of the UK's historical role.

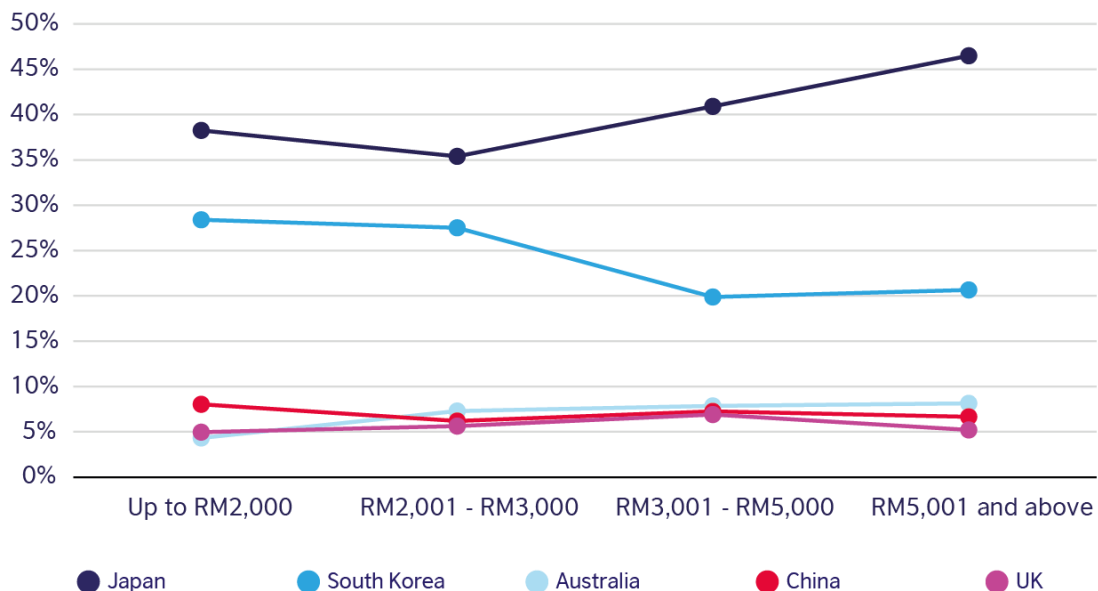
Figure 18: Preferred overseas country in terms of culture, by age



Base: Respondents at least somewhat interested in overseas culture (1,478 respondents)

Comparing Malaysian survey respondents by income level, there is a distinct trend for those with lower self-reported household incomes to have a stronger preference for Korean culture, while interest in Japanese culture is positively correlated with income levels. In contrast income levels appear to have relatively little effect on attraction to the UK.

Figure 19: Preferred overseas country in terms of culture, by monthly household income



Base: Respondents at least somewhat interested in overseas culture (1,478 respondents)

Meanwhile a look at the regional variation in country preference shows that the UK is the most popular in the central part of peninsular Malaysia – including the capital Kuala

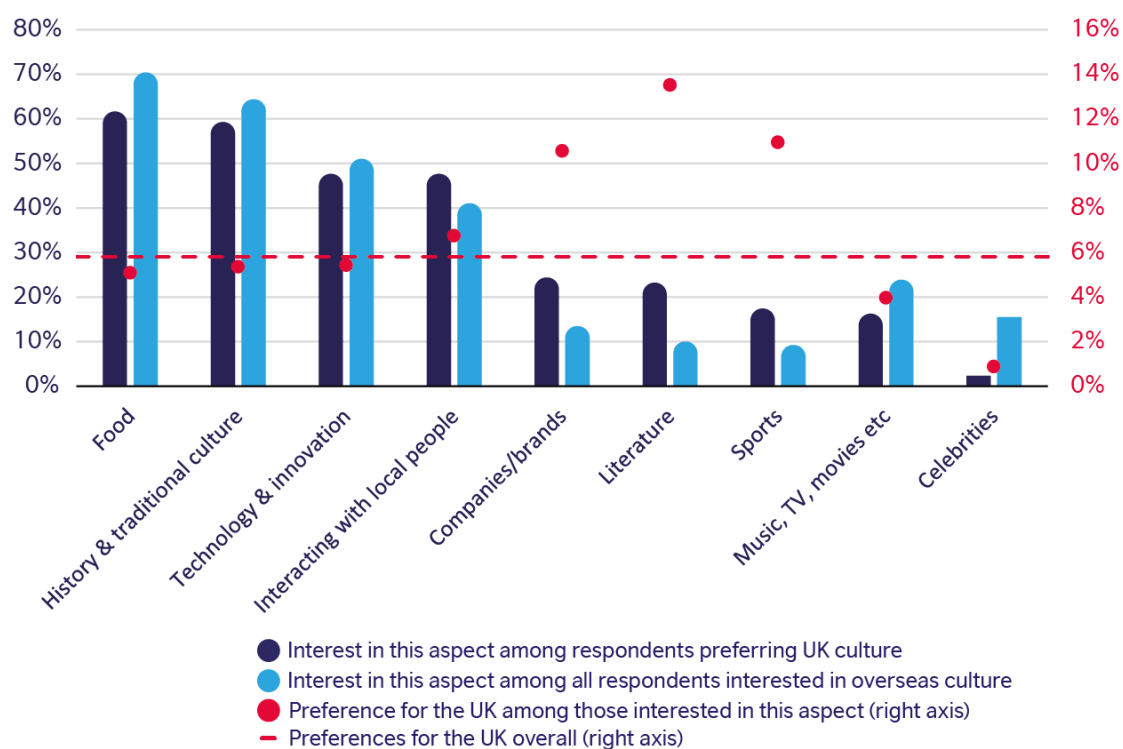
Lumpur – as well as the southern part of the country. In both of these regions 7 per cent said that this was their preferred overseas country in terms of culture.

Beyond demographics, a person's preferred aspects of overseas culture also have a direct influence on which countries' culture they find attractive. While the UK was the 5th most popular overseas country overall, it ranked second among those who said they were interested or very interested in overseas culture and who listed literature, companies / brands or sports among the three aspects they find most interesting. However, it should be noted that these aspects of overseas culture are not among the most attractive to most Malaysians.

Meanwhile the UK performed particularly poorly among respondents who said they had an interest in overseas celebrities, and also underperformed its overall score with those who named food and popular media as aspects of overseas culture they were interested in.

Preference for other countries was also affected by the aspects of overseas culture that respondents found interesting. While Japan was the clear favourite overseas country overall, it fell well short of Korea in the group that said they were interested in overseas celebrities, as well as slightly behind Korea among Malaysians who expressed an interest in overseas media such as TV, music and movies. China performed particularly well among fans of overseas literature, and to a lesser extent history & traditional culture and celebrities; meanwhile Australia was most attractive to those that said they were interested in sports and interacting with local people.

Figure 20: Preference for UK culture by interested aspects of overseas culture



Base: Respondents at least somewhat interested in overseas culture (1,478 respondents)

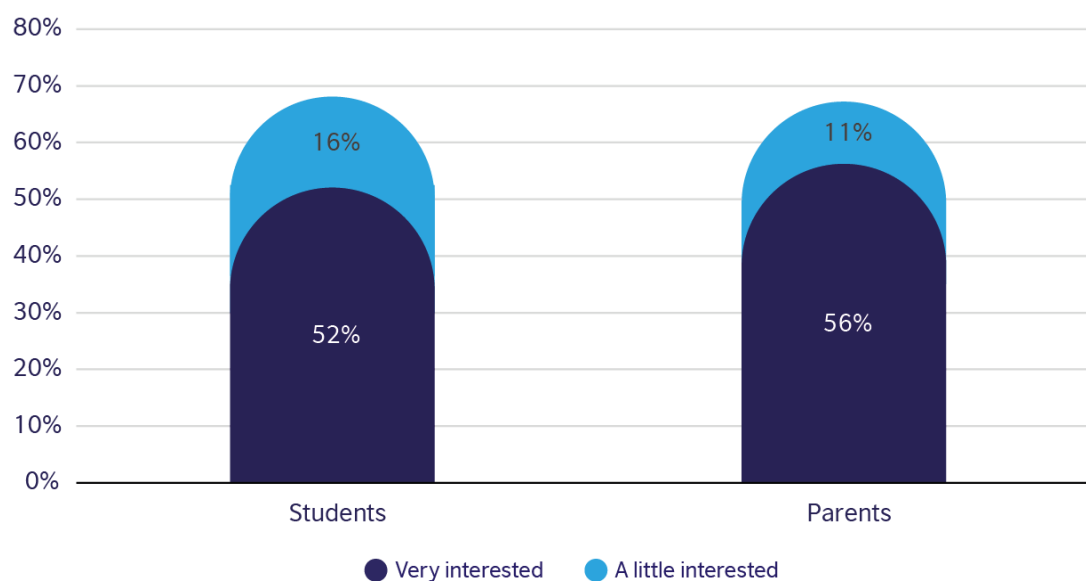
This broadly matches the relative standings of the UK when Malaysians were asked about attractiveness of specific aspects of the country's culture as described in Section 3.3, showing – perhaps unsurprisingly – that country preference is strongly affected by a country's strength in the areas a person is interested in. It also reflects comments made in focus groups on the strengths of particular countries.

4. THE EFFECT OF CULTURAL INTEREST ON OVERSEAS STUDY INTENTIONS

4.1 Interest in overseas education

Survey-based research shows that a very high proportion of Malaysian young people claim to be interested in studying abroad. More than half proclaimed themselves “very interested” in overseas study, while the number describing themselves as at least “a little interested” was over two thirds. The situation was similar among parents, 56 per cent of whom claimed to be “very interested” in sending their child to study abroad.

Figure 21: Students’ and parents’ interest in overseas study



Base: Students (338 respondents) and parents (448 respondents)

In comparison to other countries, the number of Malaysian students going overseas to study is relatively high. Nevertheless the proportion is far lower than might be implied by these survey results. Statistics from UNESCO show that around 62,000 Malaysians were studying abroad in 2018, compared to over 1.2 million domestic higher education enrolments – meaning that the share of students who will actually go abroad is roughly 5 per cent, or less than a tenth of those professing themselves to be “very interested” in studying abroad. While survey findings show that the overall level of interest is high, practical aspects such as high tuition fees and spending a long period away from home mean that most students will change their minds before the time comes to go overseas.

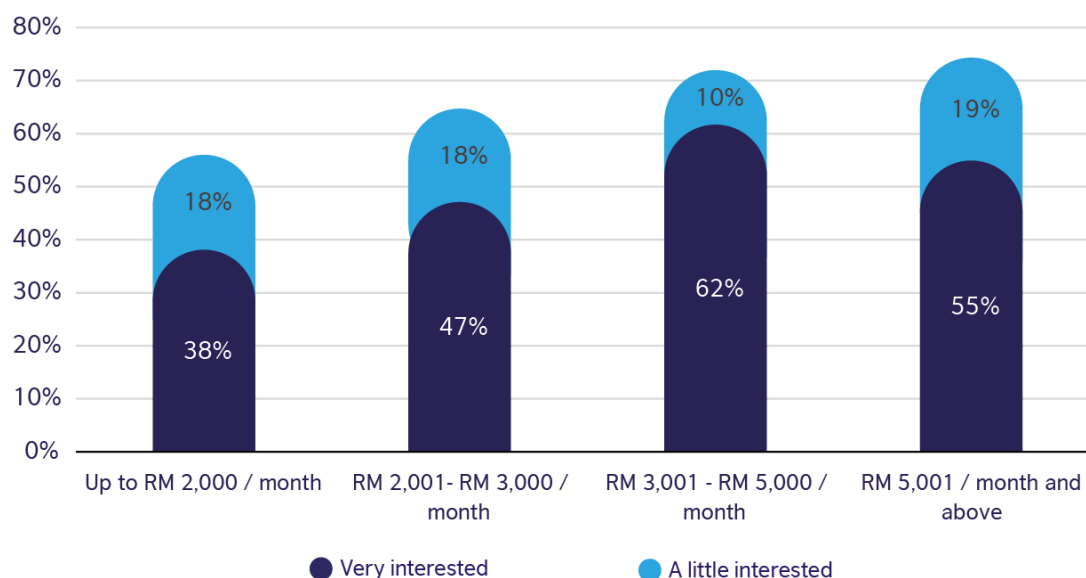
Focus group discussions also reflect a strong regard for overseas education and a high level of interest in studying abroad. Parents commented that the local Malaysian education system “*doesn't encourage us to have a critical mind*”; that employees with UK degrees – especially from elite universities – produce work “*of higher quality*”; and that friends’ children who have been abroad to study “*come back different*” (in a positive way). Parents generally felt that overseas study would help their children to gain exposure and experience, help them in their career and therefore future quality of life,

and equip them with the necessary soft skills and broader mindset for them to go further in life. Discussions were also held with students in the process of preparing to study abroad, in the UK or in another country, who similarly concluded that overseas study would allow them to experience higher-quality education and have a more successful career, develop stronger skills and experience the world.

Students at all levels of study expressed an interest in studying abroad, but the group with the highest level of interest was current high school students – perhaps reflecting the large proportion of Malaysian overseas students who go abroad at the undergraduate level, meaning that current university students are more likely to have already decided not to study abroad.

Income is also a predictor of opinions on overseas study: nearly three quarters of students from families with household incomes over 5,000 MYR (£900) per month say they are at least somewhat interested in studying abroad. However, the proportion among those with incomes below MYR 2,000 is still a little over half, illustrating that these survey results are measuring a very early stage in the study-abroad pipeline – as commented above, most of those students who said they want to study overseas are unlikely to actually do so.

Figure 22: Students' interest in overseas study by monthly household income

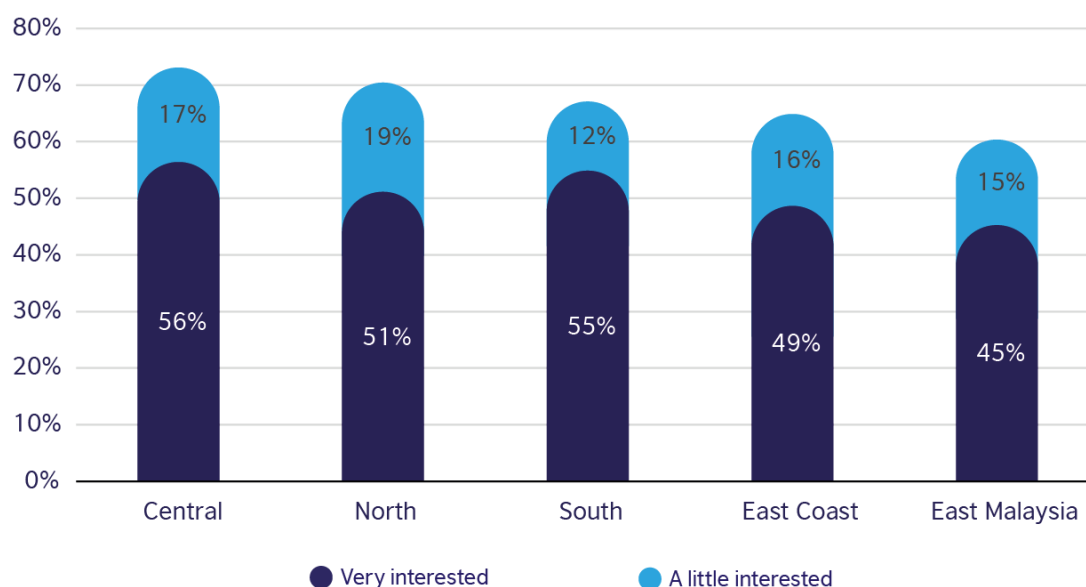


Base: Students (338 respondents)

As with overall interest in overseas culture, the differences in attitudes to overseas study between different genders are relatively small – 67 per cent of male survey respondents said that they were at least a little interested in studying abroad, compared to 69 per cent of females. Data from the UK's Higher Education Statistics Agency (HESA) shows that a slight majority (54 per cent) of Malaysian students in the UK identify as female, meaning that this group is closer to gender balance than the overall average among students at UK universities.

Analysing the regional variation in attitudes towards overseas study, students in central Malaysia – the area surrounding the capital Kuala Lumpur – have the highest level of interest in international study, with 73 per cent of this group saying they are interesting in studying overseas. The northern part of the country has the next highest level of interest, while as with interest in overseas culture, the region where survey respondents were least likely to say they wanted to study abroad was East Malaysia.

Figure 23: Students’ interest in overseas study by region



Base: Students (338 respondents)

Among parents there was a somewhat stronger link between household income and interest in their children studying abroad – perhaps as Malaysian overseas students are typically funded by their parents. However, even in the least wealthy group with household incomes below RM 2,000 per month the proportion saying that they are at least a little interested still stood at 44 per cent, with 39 per cent of the total saying that they are “very interested”. In the wealthiest group of parents, with monthly household incomes over MYR 5,000, 74 per cent said that they would be interested in their child studying overseas.

As with the students themselves, parents living in the central part of Malaysia are the most likely to be interested in sending their child abroad to study. The least likely group in this case are parents living on the East coast of peninsular Malaysia, but as with the student group the level of interest in East Malaysia is still substantially lower than average.

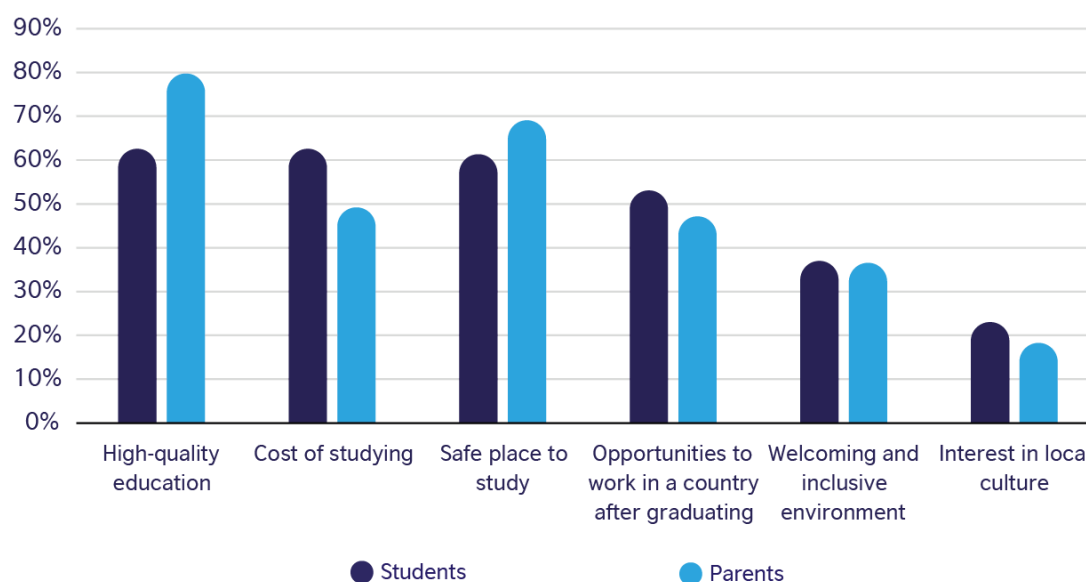
When deciding on a study location, survey results show that both Malaysian students and their parents see education quality as the most important factor, with parents placing a particularly strong emphasis on this. Similarly, focus group research brought up similar results – when potential overseas students were asked about their important factors when choosing a country to study in overseas, the first thing they talked about were renowned education institutions with top world university ranking, followed by a

broader definition of education quality including institutions or education systems that support critical thinking skills, promote discussion and the freedom to question, and teaching students to proactively resolve issues.

Cost of studying and safety are also very important factors, with parents paying more attention than their children to safety-related factors. Meanwhile only around half of survey respondents described opportunities to work in a country as important.

Perceptions of the country itself were clearly less important than its universities or education system. One of the interviewed alumni commented that “*We are there to study, and not there to sightsee, not there to play, not there for leisure, and not there to live long-term*”. Others broadly agreed with their point of view, saying that education quality was more important than the wider environment in the country.

Figure 24: Students’ and parents’ important factors when considering a country for overseas study

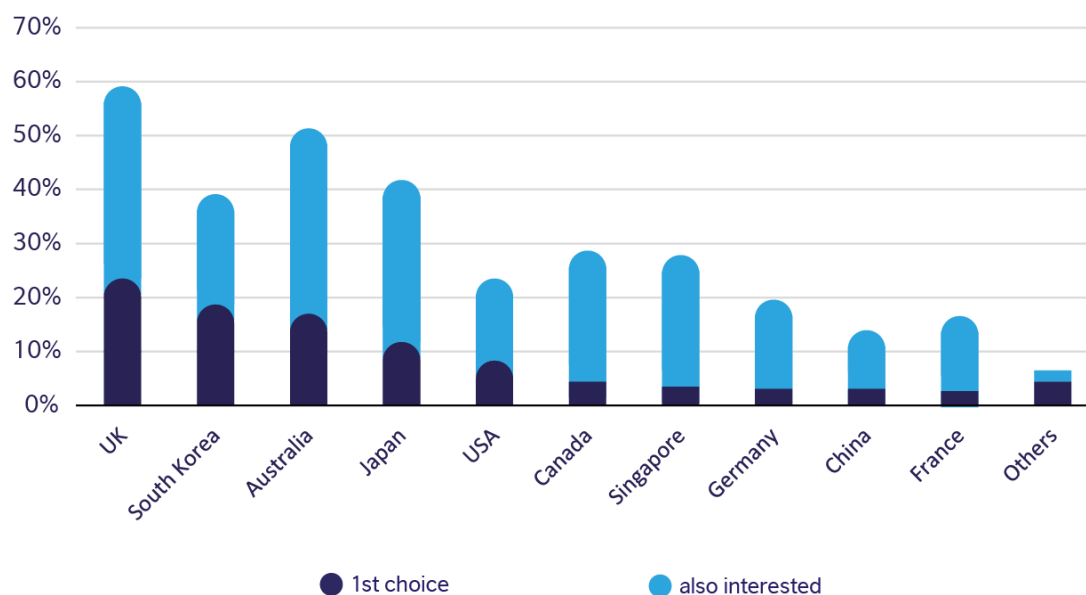


Base: Students interested in studying overseas (230 respondents) and parents interested in their children studying overseas (301 respondents)

Another important factor discussed by students in focus groups was successful alumni case studies – which would often link into personal connections, as many Malaysians know friends or family who have studied abroad and returned. When asked about their first-choice country for overseas study, students’ top answer in both focus groups and surveys was the UK. This also matches the results of focus discussions – when asked about the best countries for overseas study, the UK was very commonly mentioned, with participants talking about the country’s top world ranked universities and academic heritage, which were seen as showing that the value of certification from UK universities was better than from other countries, while the country’s encouragement of critical thinking was also praised. The UK’s close connection with Malaysia’s education system, such as A-level programmes offered in colleges in Malaysia, was also seen as an advantage. Participants did talk about other countries too – top universities in the US,

Australia, Singapore and China were all mentioned – but the UK was clearly top-of-mind in this discussion.

Figure 25: Students' preferred countries for overseas study

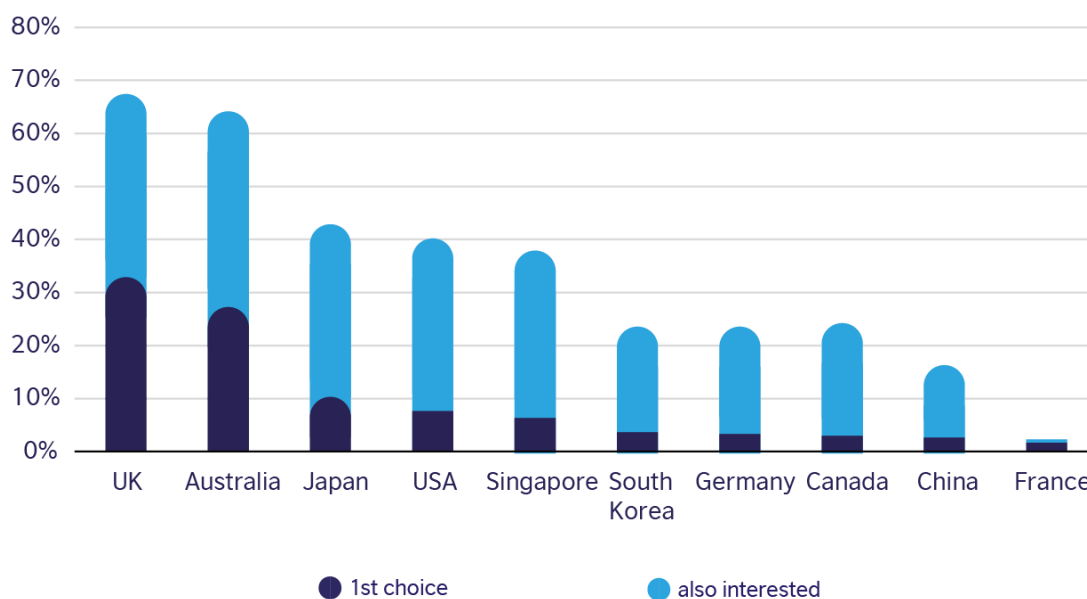


Base: Students interested in studying overseas (230 respondents)

One major difference between focus group findings and survey results is the relatively large proportion of survey respondents choosing South Korea as their first-choice study destination – a country which was not mentioned at all in this context as part of focus group discussions. Japan's position as the fourth most mentioned education destination in survey results, was again a notable difference from focus group findings. Data from Malaysia's Ministry of Education confirm that neither of these two countries are among Malaysians' top study destinations, with Korea accounting for less than one per cent of Malaysian students known to be abroad in 2018 while students in Japan only made up 1.5 per cent of the total.⁴

Parents also rated the UK as their clear number 1 preferred study destination for their children, followed by Australia. Parents had a stronger preference for traditional study destinations, with the UK and Australia both attracting a larger proportion of first-choice answers than among students.

⁴ <https://www.mohe.gov.my/en/downloads/statistics/2020>

Figure 26: Parents' preferred countries for overseas study

Base: Parents interested in their children studying overseas (301 respondents)

Social media analysis shows that when discussing education in three key countries (the UK, US and China), the thing that Malaysians talk about most online is future prospects – including discussions of advice on considerations of going abroad vs. studying/working in Malaysia. Future prospects are frequently synonymous with employability. Meanwhile the next largest category of discussion was related to excitement and the student experience, followed by scholarships.

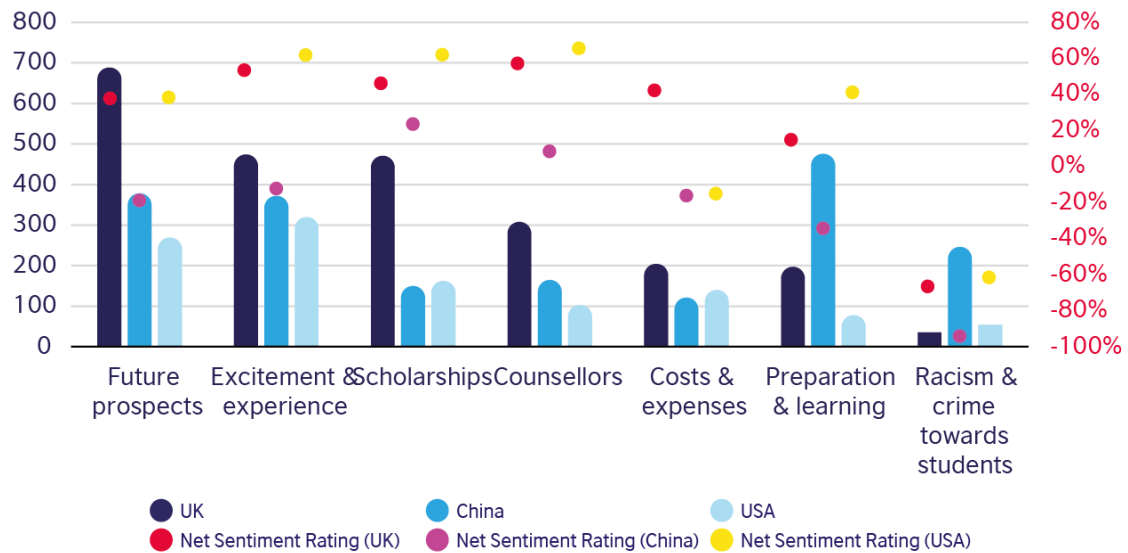
The overall volume of discussion for UK education was notably higher than the other two countries. The UK also had the strongest net sentiment ratio among these three countries, with its 42 per cent NSR score slightly higher than the USA and far above China's net-negative score of -33 per cent. As with the overall total, future prospects and employability were the most popular discussion topic among social media posts talking about UK education, while also having by far the largest share of discussion about scholarships due to the variety of initiatives and organizations promoting various fields of education that are linked to higher education in the UK.

Net sentiment on the cost of studying in the UK was positive overall, while discussion of costs in the USA shows that this country is more likely to be seen as an expensive study destination.

Conversations on education in China revolved around experiences concerning schooling systems, whereas, those around UK/USA are mostly about prestigious universities. The high volume of discussion on preparation and learning for study in China is related to the presence of Chinese vernacular schools in Malaysia which are seen as equipping children with a better quality education and preparing them for universities in China even though many of these students will never go on to study abroad. There was also a lot of online discussion about discrimination against Malay

students in China compared to comparatively fewer posts about similar situations in the UK or US.

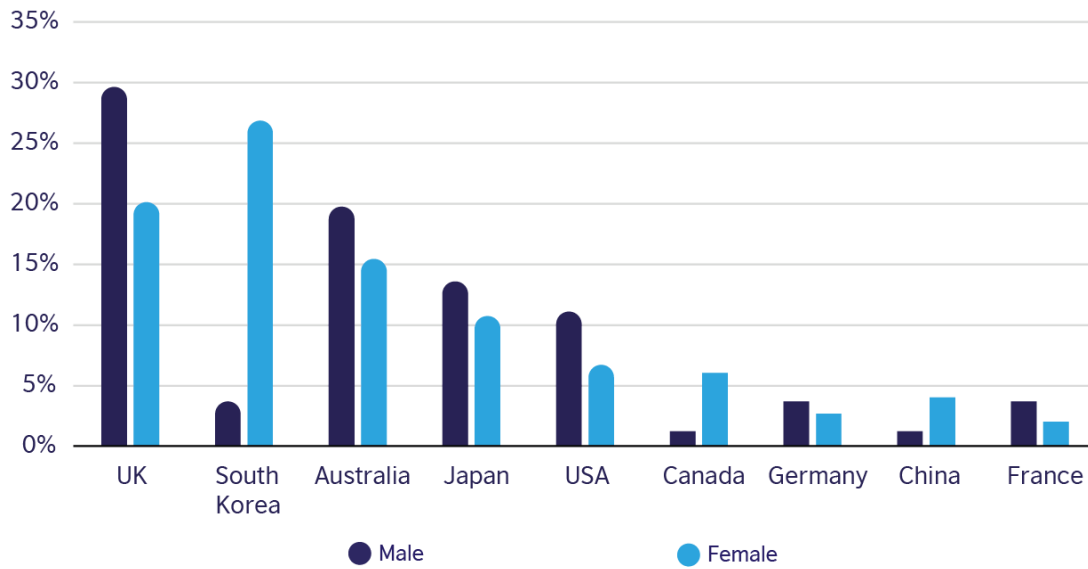
Figure 27: Social media post volume and net sentiment ratio by aspect of overseas education



Base: Students interested in studying overseas (230 respondents)

Despite female Malaysians' stronger interest in UK culture overall, the UK was far more likely to be chosen as a first-choice study destination by male survey respondents. Among those that said they were at least a little interested in studying abroad, 30 per cent of males said they would prefer to study in the UK, compared to only 20 per cent of females. Other major study destinations including Australia and the US were also preferred more by males, while a large proportion of female respondents choosing Korea as their top preferred study destination – more than a quarter, compared to less than one in every 25 male students.

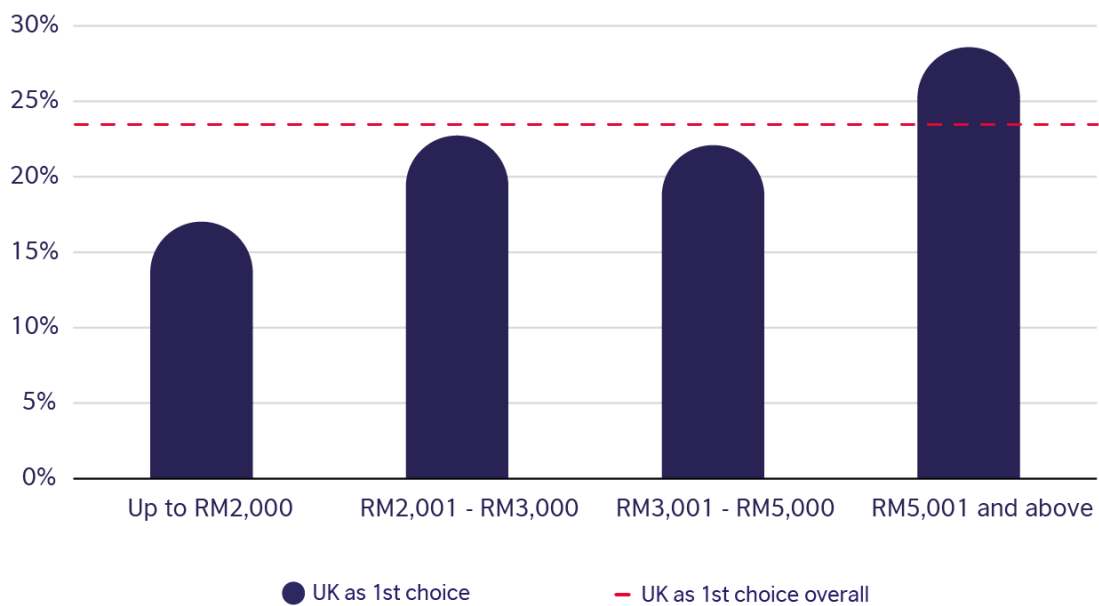
Figure 28: Students' preferred countries for overseas study, by gender



Base: Students interested in studying overseas (230 respondents)

People’s economic situation also impacts their choice of study destination. Among the wealthiest group of potential students – those with monthly household incomes of RM 5,000 or above – 29 per cent named the UK as their first-choice destination, while the UK’s share of the least wealthy group was only 17 per cent. Preference for Australia also showed a positive correlation with income, while South Korea showed the opposite trend; Korea was the most-preferred country in the lower two income bands but was ranked only 3rd in the RM 5,000+ income band after the UK and Australia.

Figure 29: Students' preference for studying in the UK by monthly household income



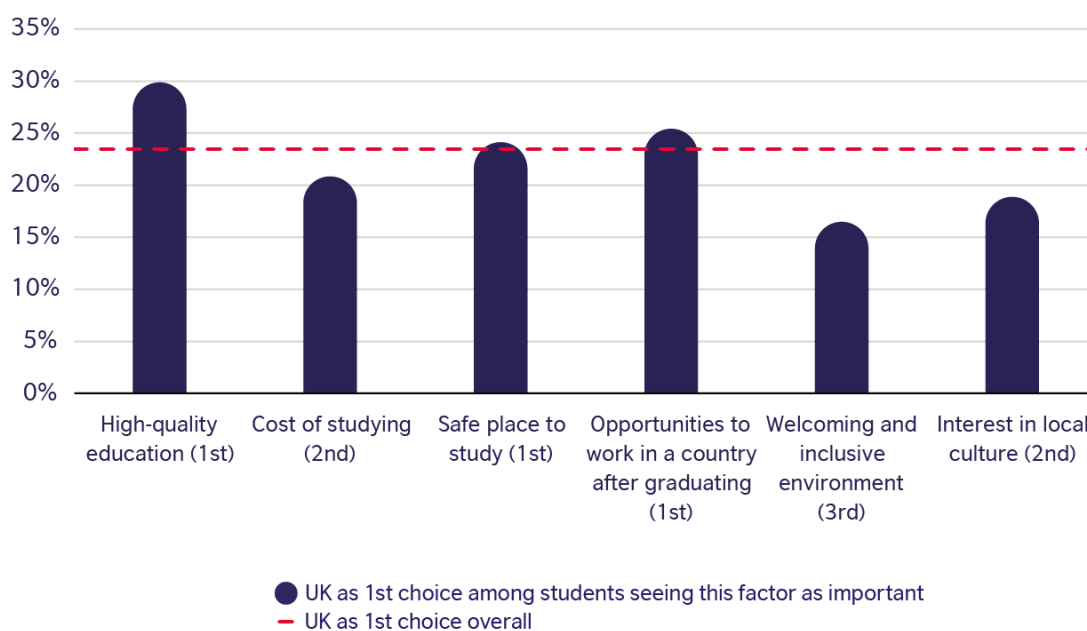
Base: Students interested in studying overseas (230 respondents)

As with cultural preference, the UK was more likely to be chosen as the preferred study destination among respondents in the central part of the country, including Kuala Lumpur and Selangor. A third of students in this region named the UK as their top preferred destination, significantly higher than the 23 per cent national average. In comparison the UK's performance on the East coast was comparatively poor, while the US and Australia both did much better in this region.

There was little difference in preference for the UK by students' current level of study, with relatively similar proportions of high school students and university students selecting the country as their preferred study destination. However, there were some differences in preferences for other countries. Current school students, who would likely be interested in undergraduate study abroad, were comparatively more likely to choose Australia or the US as their preferred destination compared to students already at university who were more likely to say Japan.

There were also strong connections between the factors that students said were most important when choosing a country and their top choice of destination. In the case of the UK, the strongest predictor was whether they saw high-quality education as one of their top factors. Among those that named this factor, 30 per cent chose the UK as their ideal study destination, while only 13 per cent of those that saw other factors as more important said that the UK was their first choice.

Figure 30: Students' preference for studying in the UK by important factors when choosing an overseas study destination



Base: Students interested in studying overseas (230 respondents)

Overall, the UK was the leading study destination among students who named high-quality education, safety and working opportunities among their top factors when choosing a country for overseas study, but was second behind Korea among those that said the cost of studying abroad or interest in local culture was a top factor and third behind both Australia and Korea among those who said that a welcoming and inclusive

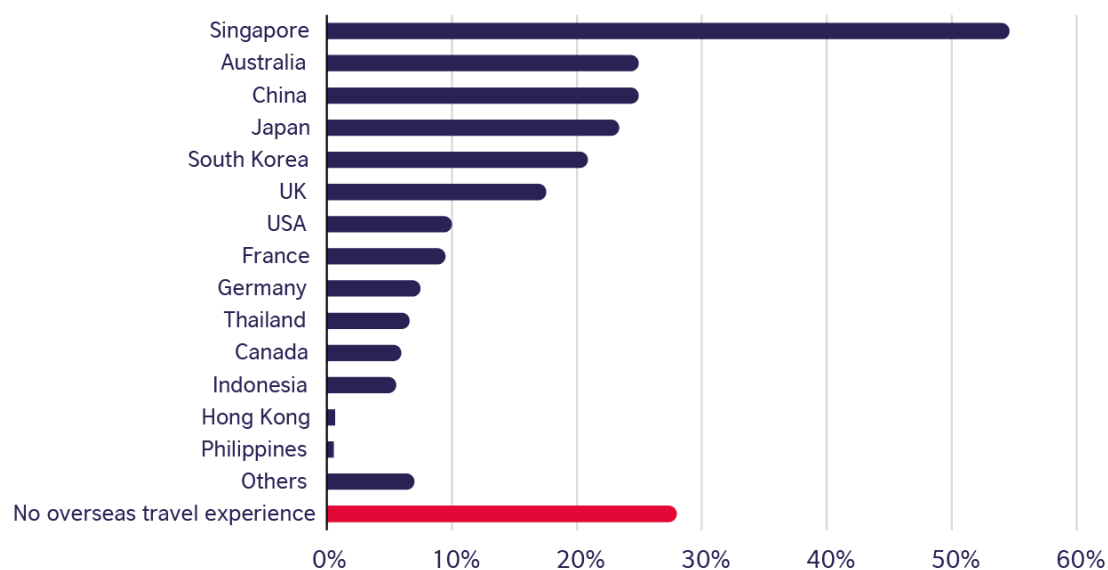
environment was one of the most important part of their overseas study choices. The importance of cultural interest is discussed in more detail in Section 4.4.

4.2 Interest in overseas travel

Travel was a popular topic among focus group participants. While 2020 and 2021 have not been the best years for overseas travel, focus group participants say that their interest has not diminished and all participants are ready to travel again when the world has recovered from the pandemic. Malaysians commented that they were interested in experiencing scenery and climates that do not exist in Malaysia; exploring a ‘Western world’ experience that they have been exposed to through Western media and content; experiencing different people, food and lifestyles; experiencing ‘traditional’ customs; relaxing through an ‘escape’ such as a beach holiday; or having a once-in-a-lifetime extraordinary experience with a way of life that seems mysterious, faraway and considered out of reach.

Survey results show that a large proportion of Malaysians have experienced travel overseas: 72 per cent said they had been abroad at least once, with Singapore as the most common destination followed by Australia and China. The UK was the 6th most popular destination, with 18 per cent saying they had travelled to the country. People reported taking an average of 1.8 overseas trips in 2019.⁵

Figure 31: Previous travel experience by destination country



Base: All respondents in Malaysia (1,800 respondents)

When asked about their attitudes towards overseas travel, most Malaysians had positive responses to every country we asked about. A little over three quarters of respondents

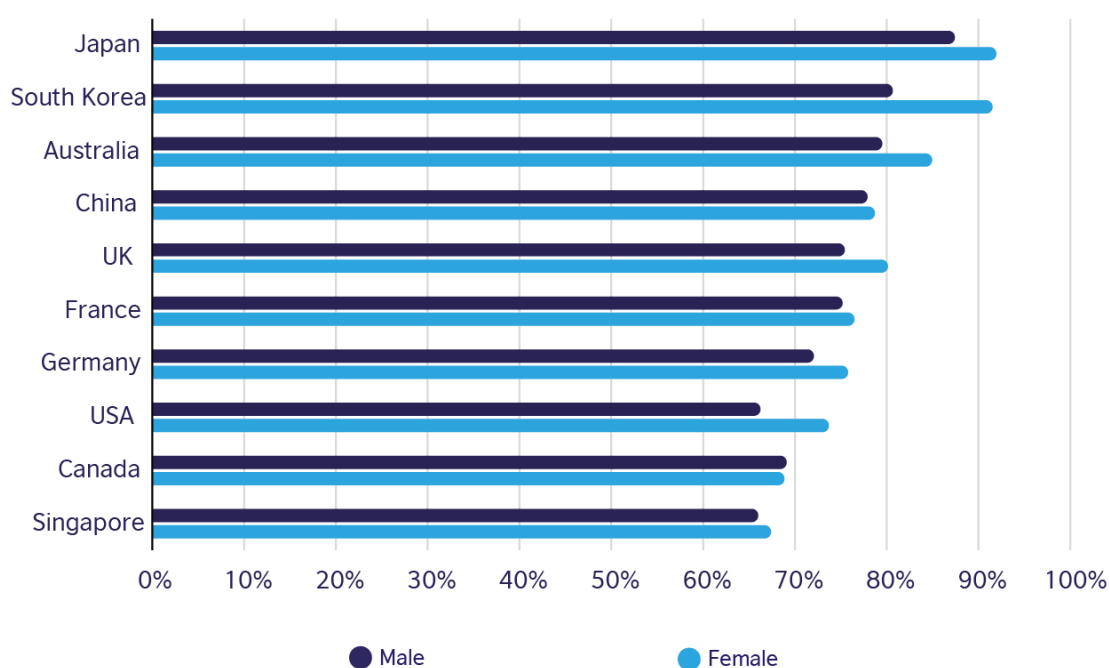
⁵ The survey specifically asked about 2019, as international travel in 2020 was affected by the Covid-19 pandemic.

said that they would like to travel to the UK as a tourist, ranking the country 5th among the 10 countries we asked about – marginally behind China, but slightly ahead of France.

Overall the most attractive countries for travel were Japan and South Korea, while the least attractive was Singapore – perhaps because more than half of Malaysians had already visited this country and felt that they had already seen all it has to offer.

While both male and female Malaysians have a strong interest in overseas travel, this is relatively more popular among women – all countries except Canada had a larger proportion of female respondents wanting to travel there than males. The UK had a gap of five percentage points between the two genders, while Korea had the largest difference at 11 percentage points.

Figure 32: Interest in travelling to selected countries, by gender

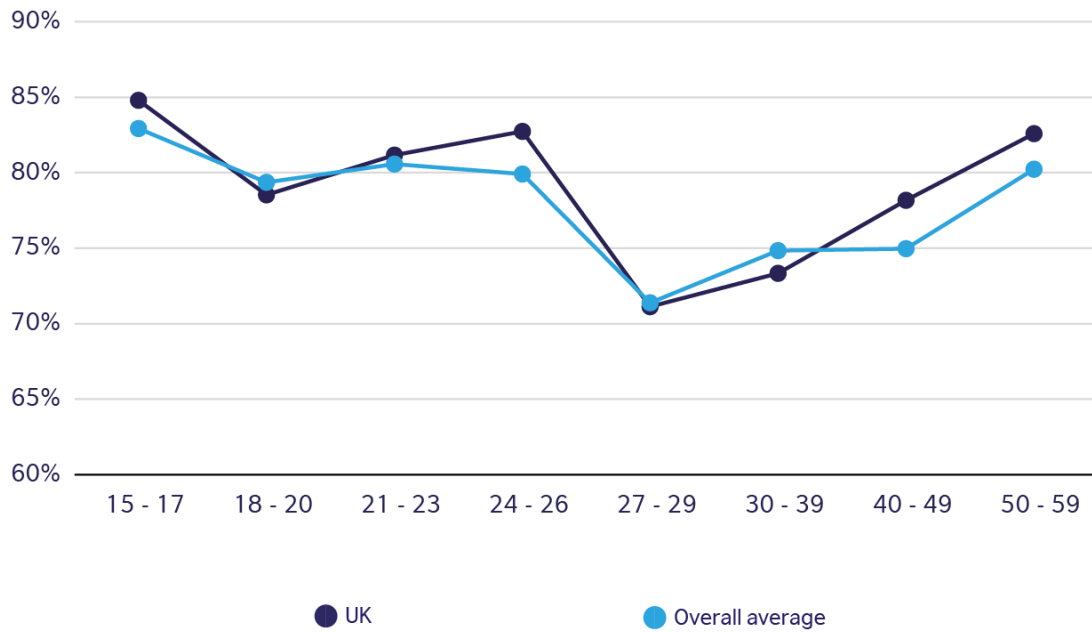


Base: All respondents in Malaysia (1,800 respondents)

Analysing interest in overseas travel by age shows a somewhat complicated pattern. Interest rises as Malaysians approach their mid 20s, but then drops substantially for those in the 27 – 29 age group. Interest then increases again as people get older, with the highest overall level of interest being in the 50-59 age group – the oldest covered in the survey. This may reflect people in their late 20s becoming busier in terms of work and family life, while older people have more time and opportunities to go abroad.

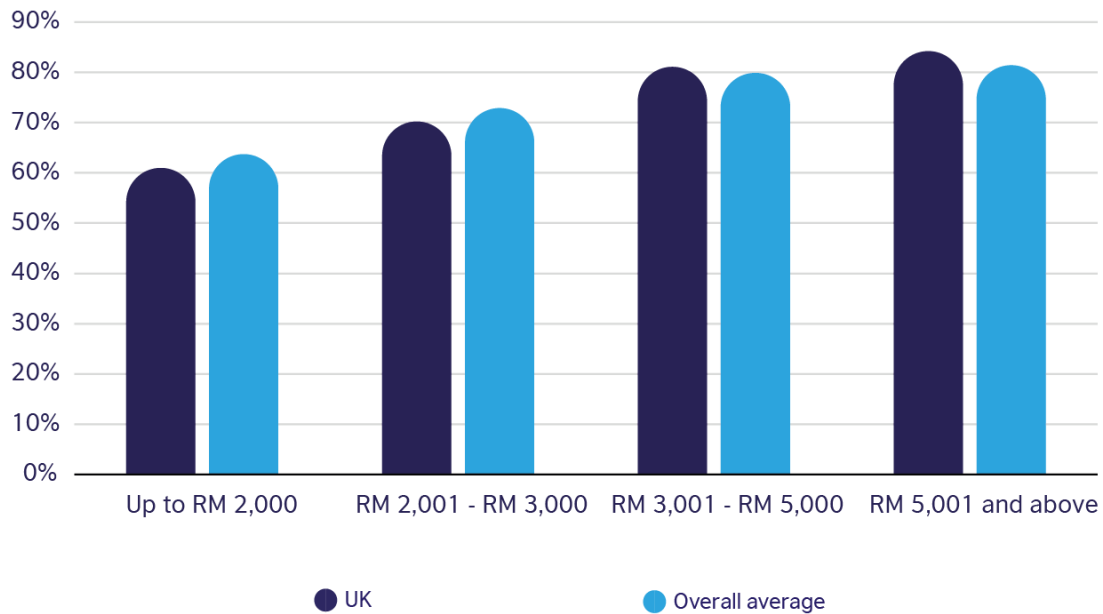
As the chart below shows, interest in travel to the UK tracks the overall average quite closely, although some other countries have different patterns. Malaysians' interest in travelling to Singapore declines consistently as they get older, while interest in visiting France increases with age.

Figure 33: Interest in travelling to the UK, by age



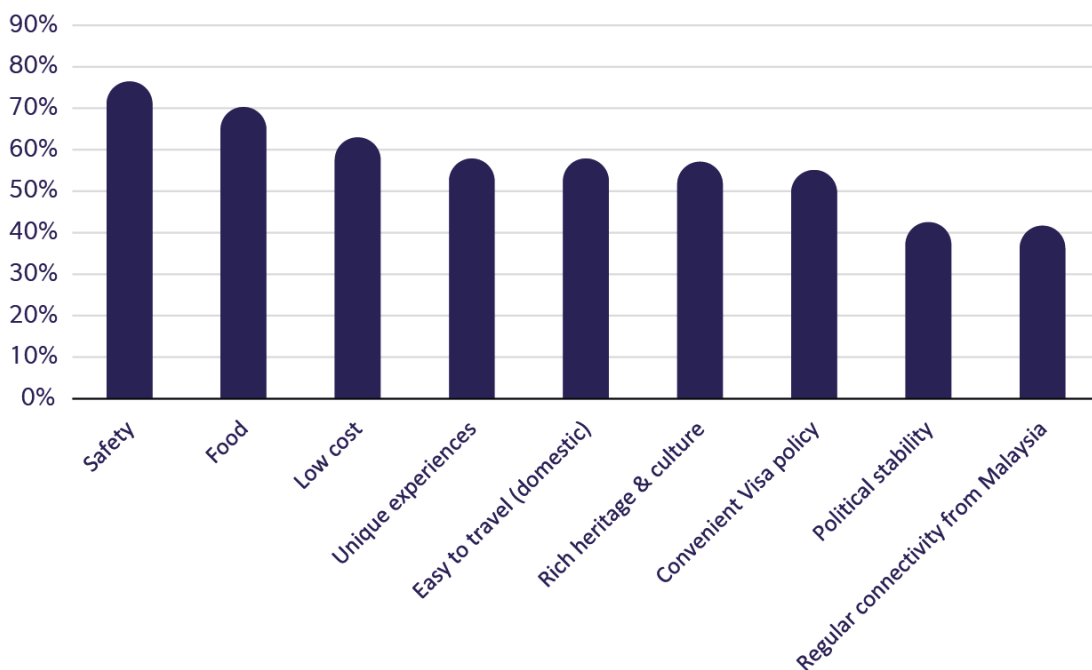
Base: All respondents in Malaysia (1,800 respondents)

Income also has a strong effect on interest in overseas tourism, with a clear increasing trend as people become wealthier. The UK is no exception – 84 per cent of respondents in the wealthiest income group say they are interested in travel to the UK, compared to 61 per cent in the least wealthy segment.

Figure 34: Interest in travelling to the UK, by monthly household income

Base: All respondents in Malaysia (1,800 respondents)

When survey respondents were asked about the important factors that determine the overseas countries they want to visit, the top result was safety which more than three quarters said was an important factor. Food was also seen as important by a fairly large majority, followed by cost. Among the nine listed factors only two – travel links from Malaysia and political stability – were described as important by less than half of survey respondents, but even these were both named by over 40 per cent of respondents.

Figure 35: Important factors when deciding whether to travel to an overseas country

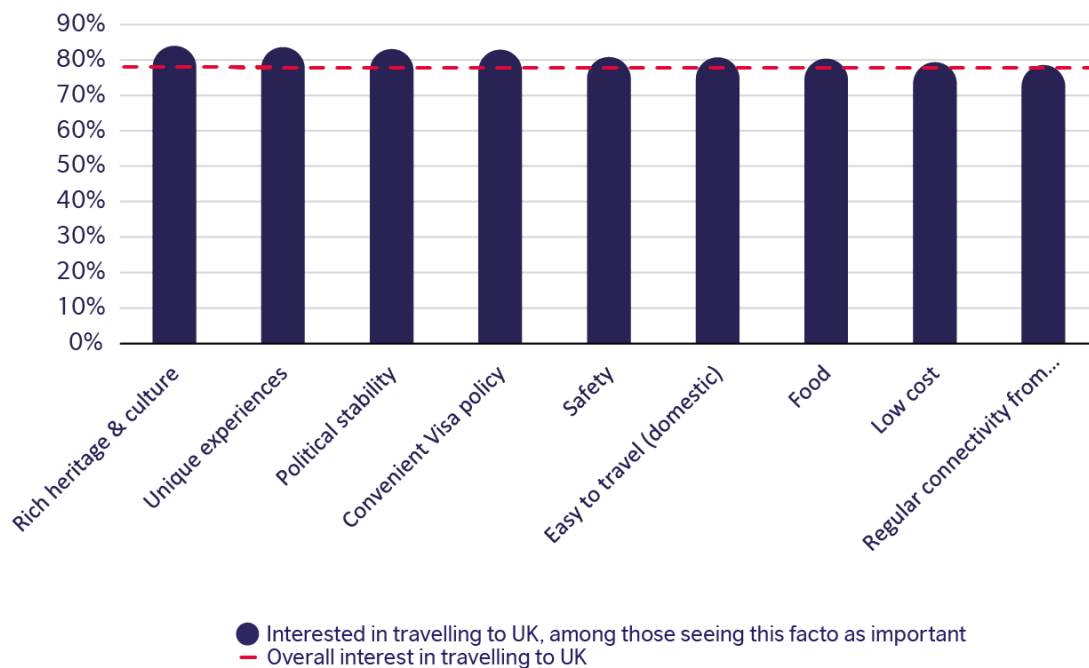
Base: All respondents in Malaysia (1,800 respondents)

Meanwhile, focus group discussions showed that the main aim of travelling abroad is to see, taste, hear and experience the country via interacting with the local attractions, people and food. Malaysians talked about paying attention to local attractions; locals’ behaviour and characteristics like their openness, friendliness and helpfulness; characteristic foods associated with a country; the weather and climate – with “four seasons” seen as an attractive factor due to its difference from Malaysia’s own climate – and commercial activities such as shopping and leisure activities. The cost of travelling was also mentioned, but was seen as more important for younger people, likely due to their due to lower incomes.

Talking about the UK specifically, Malaysians talked about interest in visiting attractions such as London Eye, Big Ben, London Bridge (likely referring to Tower Bridge) and Stonehenge. The also mentioned fish and chips as the food most closely associated with the UK.

Going back to the survey results, a look at the influence of these factors on Malaysians’ decisions shows that they have a relatively limited effect on country preference. The group most likely to say they wanted to travel to the UK was those who saw rich heritage & culture as an important factor, followed by those looking for unique experiences – but in both cases the proportion of people wanting to travel to the UK was only slightly higher than the overall survey sample at 84 per cent. The factors least likely to inspire people to choose the UK were connectivity from Malaysia, low cost and food – all unsurprising results as these areas are not among the UK’s main strengths.

Figure 36: Interest in travelling to the UK, by factors Malaysians see as important when deciding whether to travel to an overseas country



Base: All respondents in Malaysia (1,800 respondents)

As with education decisions, cultural attraction also affects Malaysians' choice of preferred travel destination. This issue is discussed in more detail in Section 4.4.

4.3 Interest in overseas business, work and immigration

The proportion of Malaysians saying they were interested in trade or doing business with overseas countries was also high. The proportion of people saying that they were interested in doing business with specific countries ranged from 66 per cent for Japan to 43 per cent for France.

These proportions are very high and contrasted with focus group findings, where most participants did not see this as relevant to them. Young people in focus groups described overseas business and trade as not very relevant to them, while even most adults said that the nature of their job does not require business interaction with overseas people. As with overseas education plans the survey findings appear to reflect very vague initial aspirations rather than serious engagement in this field.

Living or working abroad for a longer period received a more lukewarm response both in focus groups and in the survey findings. Most Malaysians described themselves as contented with being in Malaysia – however if they were to live abroad, considerations would very much revolve around their specific reasons to move, whether that involves their career, education, a better life for their children or other factors. Among the 10 target countries Malaysians were most likely to express interest in living in Singapore due to having a similar culture, ethnicities and language. Young people appeared more interested in moving abroad which they linked to making progress in their career and elevating their standard of living through earning a higher income.

Compared to other countries the UK performed comparatively poorly with only 53 per cent of survey respondents saying they wanted to do business with British people; this ranks the country 8th among the 10 target countries. Despite perceptions of the UK as a strong country economically, Malaysians typically do not see this as directly relevant to their own engagement.

Figure 37: Interest in doing business internationally or living overseas long-term, by overseas partner country



Base: All respondents in Malaysia (1,800 respondents)

Interest in trade with all countries was strongly linked to gender, with male Malaysians much more likely than females to say they were interested in doing business with people from almost all overseas countries. The UK had a larger-than-average gender gap of 9 percentage points, with 58 per cent of males but only 49 per cent of females saying they were interested in doing business with the UK. There is no consistent variation by age. When it comes to interest in living abroad there are relatively few differences by gender, while attitudes across different age groups age varies significantly but inconsistently.

When discussing factors that influenced peoples' interest in business interactions with people from a given country, focus group participants that were interested in this type of interaction first mentioned a country's stability – whether politically, economically, or socially. Other critical factors were safety, lack of corruption, and the size of the country's economy.

Government policy is also a critical factor, including the level of openness, specific rules and regulations, taxation, and any specific processes required.

Other factors include the technological advancement of a country, the behaviour and attitude of locals including honesty and working efficiency, and the costs associated with doing business in the country. Survey respondents gave relatively similar answers, naming the general ease of doing business as the top factor followed by cooperative government policy and political stability and then the country's infrastructure.

When talking about desire to work in a country the most important single factor according to survey results was the level of salary that could be earned, followed by career opportunities and quality of life. Safety was also seen as important by 70 per cent of respondents, while other factors such as visa policy, cost of living and connectivity to

Malaysia were much less important. When talking about living abroad long term, the top factors were safety, the country's economy, and the quality of the local healthcare system. This was slightly different to answers given in focus groups which centred around stability and lifestyle, although concerns about personal safety were also important.

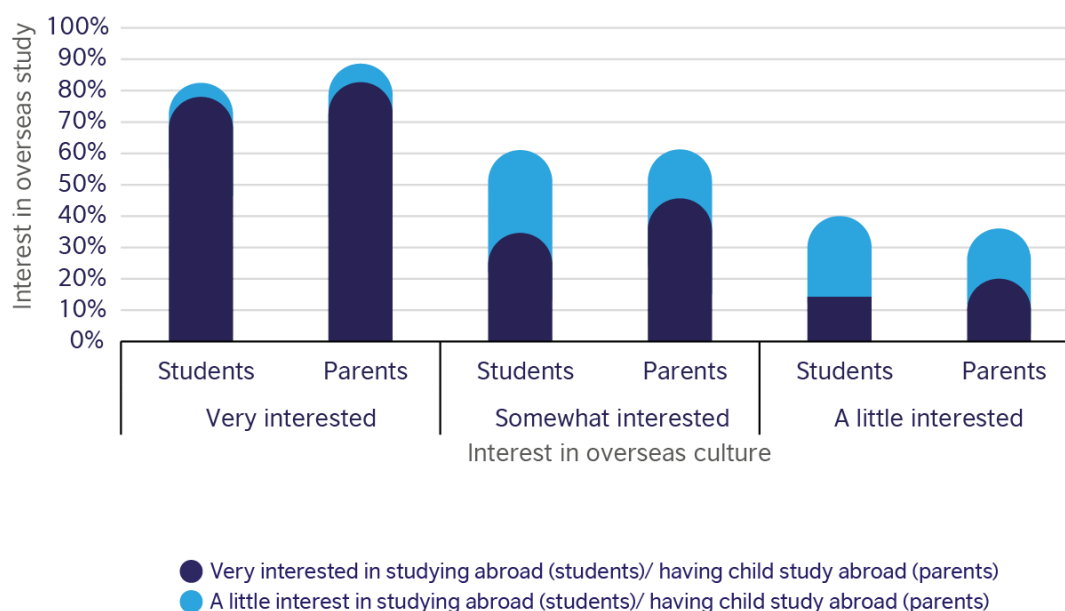
Survey questions for each of these three interaction methods – business, working abroad and living abroad long-term – also included an option for “rich heritage and culture”. Only a minority of Malaysians saw this as important for each type of interaction, ranging from 23 per cent for business interactions to 26 per cent for living abroad long-term.

4.4 The link between cultural interest and overseas interaction

One of the main goals when the British Council set out to conduct this research was to examine the connection between cultural interest and intention to study overseas or otherwise interact with overseas countries.

As with other ASEAN countries, survey-based research found a direct link between Malaysians' attitudes towards overseas culture and their level of interest in overseas study. Among both students and parents, people that described themselves as “very interested” in overseas culture were the most likely to say they wanted to study abroad (for students) or that they wanted their child to study abroad (for parents), followed by those describing themselves as “somewhat interested”.

Figure 38: Students' and parents' interest in studying abroad, by level of interest in overseas culture



Base: Students (338 respondents) and parents (448 respondents)

Note: Comparisons for and parents describing themselves as “not at all interested” in overseas culture are not shown, due to low numbers of respondents giving this answer ($n < 10$)

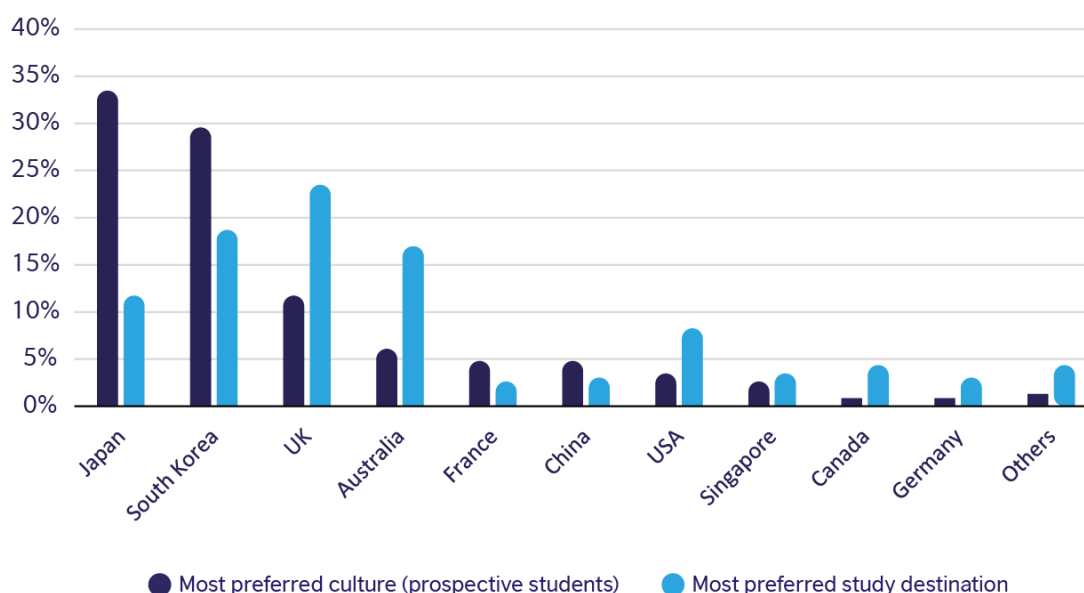
However, focus group findings show that, while culture may be an influencing factor for some prospective students, most Malaysians take a more practical view of overseas

study. Some saw it as virtually irrelevant – one focus group participant who had previously studied abroad, quoted above in Section 4.1, commented that “*We are there to study, and not there to sightsee, not there to play, not there for leisure, and not there to live long-term*”. Others gave more nuanced opinions, saying that culture was important to them because they will be living in a country as they complete their studies, although it was still seen as a secondary influential factor, taking a back seat to the education system’s quality, cost of education and living, and the strength of the qualification / certification back in Malaysia. One prospective student said that “*the main objective is for us to achieve a certain qualification. Culture comes after our main objective-which is the qualification*”.

When asked about the important factors driving students’ choice of overseas study destination, only 22 per cent named interest in the country’s culture – lower than any other option and far behind the leading factors such as education quality, cost and safety.

There are also notable differences between the overall top preferred countries in cultural terms and prospective students’ preferred study destinations. The UK performs much more strongly in terms of education preference than overall cultural interest, being the most-preferred destination but only the third most likely to be chosen as the most interesting overseas culture by students who said they were at least a little interested in studying abroad. In comparison Japanese culture attracted the most interest by a large margin but the country was only 4th overall in terms of the number of students naming it as their preferred place to study.

Figure 39: Students’ preferred overseas culture and preferred study destination



Base: Students interested in studying overseas (230 respondents)

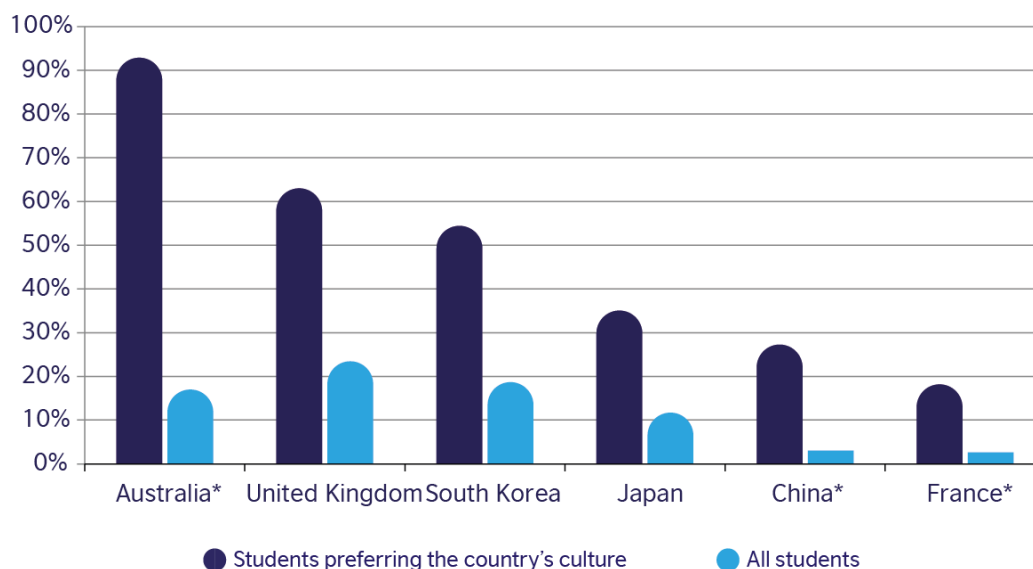
When we asked directly about the impact of cultural interest on doing business, this was again described as being less important than most other factors. Focus group participants said that culture was important to the extent that the two parties had

mutual respect, agreement and understanding, and to ensure that *“business and transactions can be done well, without misunderstanding, no errors, and to ensure a smooth deal, with low risk”*. However, this was seen as a low bar to reach. Only 23 per cent of survey respondents described culture as one of the most important factors they considered when deciding whether to do business with someone from an overseas country, less than half the proportion that named any other listed factor.

In comparison to education and business, when it comes to tourism there is a much more direct connection between culture and travel interest. Focus group participants discussed aspects relating to locals’ behaviour such as openness, flexibility, friendliness and helpfulness, as well as talking about cultural aspects like art, food, festivals or customs. One participant commented that *“The culture is what we can bring back as a memory, the overall experience”*, while conversations about travel to the UK often revolved around cultural aspects like literature or history.

Finally, when it comes to living and working abroad, culture was seen as a particularly important factor. Focus group respondents distinguished this from travel or other short overseas visits, with one saying that even a poor experience can be endured during a short-term visit but that if moving abroad for an extended period *“the culture must suit us [...] culture is the top priority”*.

Despite comments that culture is not a major factor in education choices, a closer look at the data shows that there is still a strong connection between cultural preference and choice of study destination. Among prospective students, those that named a country as their favourite in terms of culture were significantly more likely to also name it as their preferred study destination. Almost half of all students that said they were interested in overseas study said that the country they saw as their first-choice destination was the same as that whose culture they preferred – far more than would be expected by chance.

Figure 40: Students' preferred study destination, overall and for students preferring this country's culture

Base: Students interested in studying overseas (230 respondents)⁶

In the case of the UK, the proportion of prospective students choosing this country as their top-choice study destination was 63 per cent among the group who saw the country's culture as the most attractive, almost three times the proportion who chose the UK in the overall student group.

Similarly more than half of the prospective overseas students who said they preferred Korean culture wanted to study in that country, compared to only four per cent of those who did not name the country as the most attractive in cultural terms, suggesting that this study interest is almost entirely driven by interest in the country's culture.

If study destinations beyond the first choice are also included, the proportion of prospective overseas students preferring the UK's culture who are also considering studying in the country increases to 85 per cent, compared to 59 per cent of those who did not choose the UK as their preferred country in terms of culture. Trends for other countries are similar, with 69 per cent of prospective overseas students that were interested in Japanese culture naming it as a possible study destination, while among the small group of students interested in Australian culture all of them said that they would consider studying there.

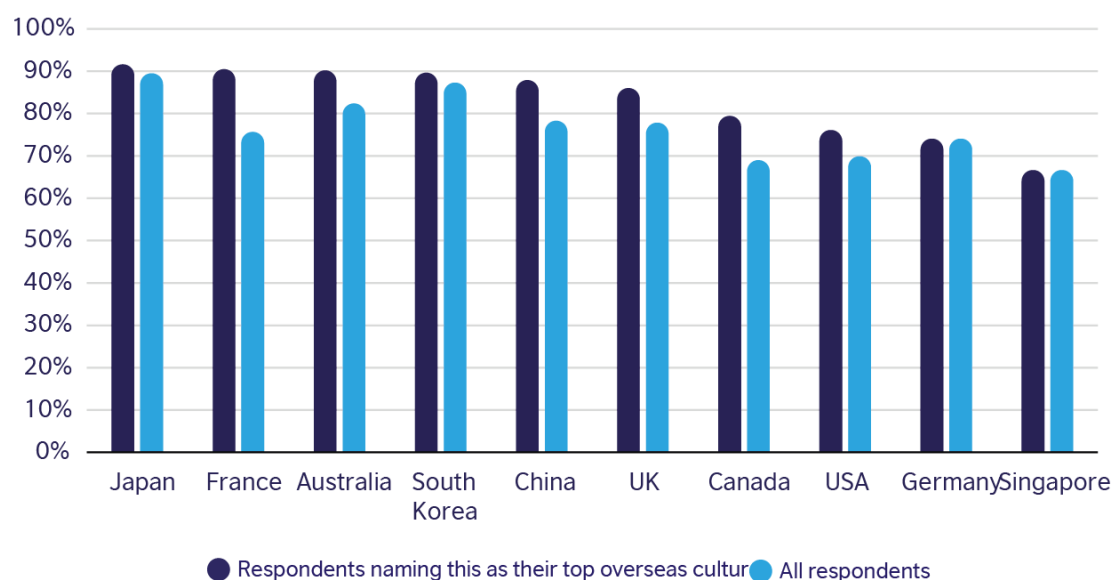
This relationship holds even among students who said that interest in a country's culture did not play an important role in their choice of study destination. Even among survey respondents that said this was not an important factor, the proportion of students naming their culturally-preferred country as their first-choice study destination was far

⁶ Data for students preferring Australian, Chinese and French culture may be unreliable as fewer than 20 prospective overseas students named each country as their preferred overseas culture. Data for Canada, Germany, Singapore and the US is not included in the chart above as fewer than 10 prospective overseas students named each of these countries as their preferred overseas culture

higher than the overall rate of students choosing that country, with a ratio of more than 2x for every target country.

Looking at the impact of cultural preference on tourism, survey results show that, while most respondents said that they would be interested in travelling to a country in any case, this proportion was even higher when we asked about the country that they named as most interesting in terms of overseas culture. For example, while 78 per cent of all Malaysians said they wanted to travel to the UK, this rose to 86 per cent for those who named the country as their top cultural preference, while the 87 per cent who wanted to visit Korea turned into 90 per cent of those who were most interested in Korean culture. France has the widest gap, with 90 per cent of Malaysians that prefer French culture wanting to travel there compared with 76 per cent overall.

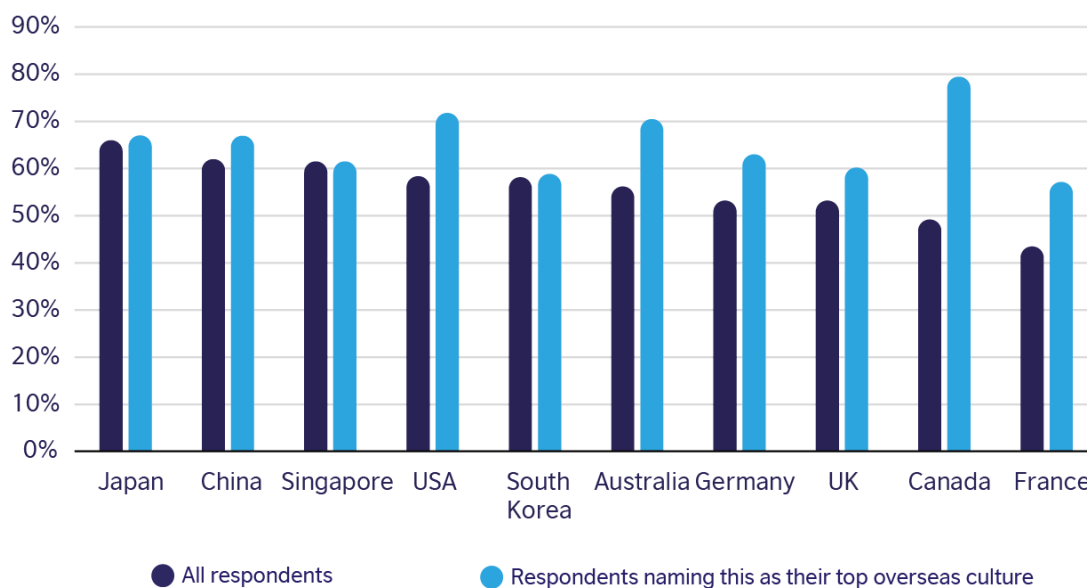
Figure 41: Interest in travelling to selected countries, overall and for Malaysians preferring this country's culture



Base: All respondents in Malaysia (1,800 respondents)

Among the 10 target countries there were only two exceptions: Singapore and Germany. Cultural interest in these two countries did not appear to increase travel intentions – perhaps because Singapore is preferred for its similarity with Malaysia, which would imply that Malaysians who name this as their favourite overseas culture are less interested in travelling overall, while fans of German culture often name aspects like technology which do not directly lead to interest in travel. However, even among those two countries the impact of cultural interest is not negative.

As with education, Malaysians' self-reported disinterest in cultural factors when considering overseas business masks a small but real effect of cultural preference on interest in doing business with people from a country. In the case of the UK, 60 per cent of respondents that named the UK as having the most interesting culture among overseas countries said that they would be interested in doing business with the country, compared to 53 per cent of all survey respondents. There were similar gaps for most other countries.

Figure 42: Interest in doing business with partners in selected countries, overall and for Malaysians preferring this country's culture

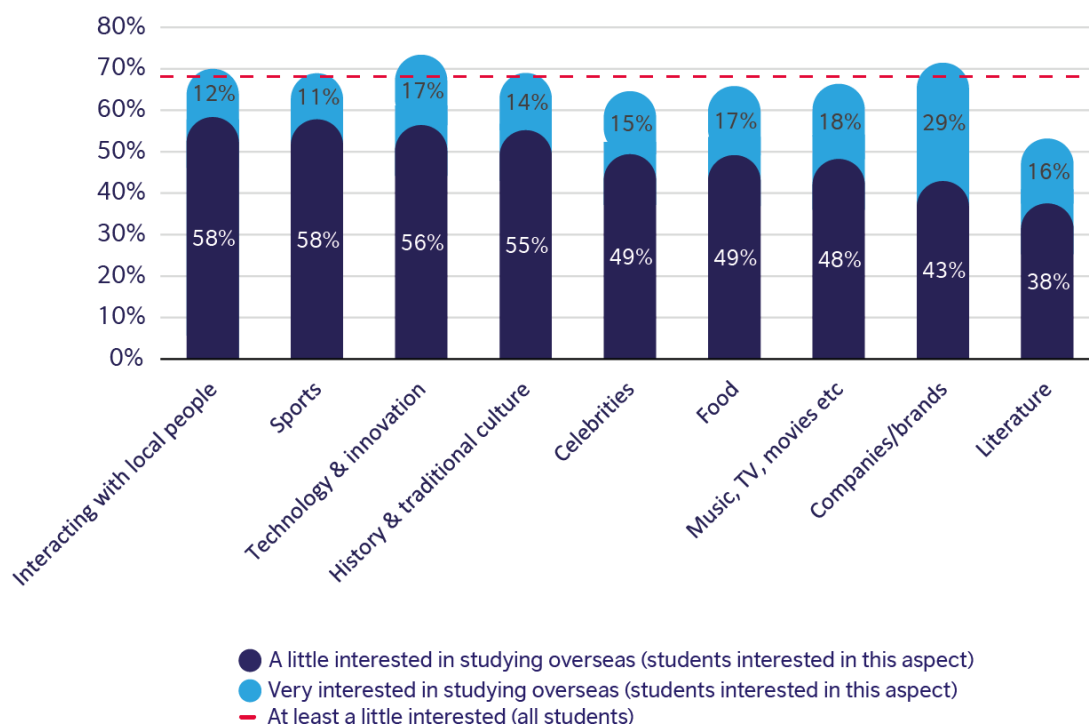
Base: All respondents in Malaysia (1,800 respondents)

The gaps in interest in living in different countries long-term depending on cultural interest were substantially larger than those for business or tourism. In the case of the UK, 57 per cent of those that named the country as their preferred overseas culture said that they would be interested in living in the country long-term, compared to just over a third of the overall sample.⁷

Interest in different aspects of overseas culture also affects the level of interest in overseas interaction. Looking first at education, the proportion of students who said they were interested in studying abroad varied substantially based on what aspects of overseas culture they found most interesting.

73 per cent of students who named technology and innovation among the aspects of overseas culture they were most interested in said that they were at least a little interested in studying abroad, compared to 68 per cent overall and 53 per cent of those who saw literature as one of their top overseas cultural interests. Those naming interaction with local people as a top cultural interest were the most likely to describe themselves as “very interested” in overseas study.

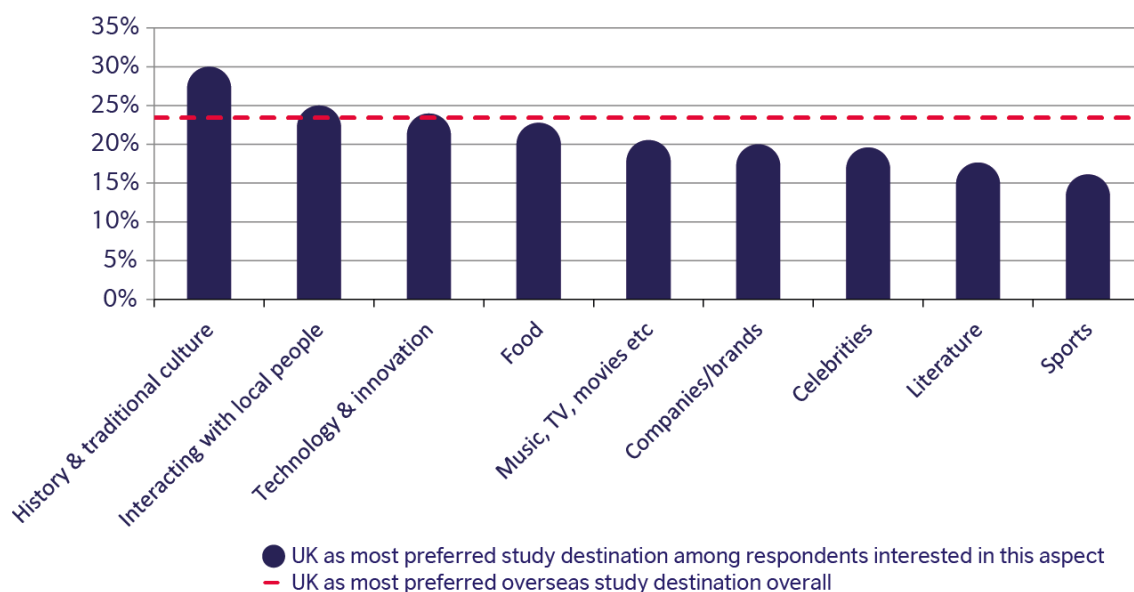
⁷ As noted several times in this report, the nature of this survey means that this level of “interest” is extremely broad, and many respondents appear not to have taken practical barriers into account when it comes to expressing their preferences.

Figure 43: Students' interest in studying overseas, by interested aspects of overseas culture

Base: Students (338 respondents)

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 history and traditional culture, while the country is less likely to be chosen as the top destination by those more attracted to sports, celebrities or literature.

The last of these is perhaps surprising as literature was a positive indicator for overall cultural interest in the UK, as well as a positive indicator of interest in UK study in some other countries. One possible reason is that the number of prospective overseas students (those that said they were at least a little interested in studying abroad) that named literature as one of their most-interested aspects of overseas culture was much lower than any other aspect with only 7 per cent of this group expressing an interest in overseas literature, which means that randomness could have a strong impact on results for this aspect.

Figure 44: Students' preference for the UK as a study destination, by interested aspects of overseas culture

Base: Students interested in studying overseas (230 respondents)

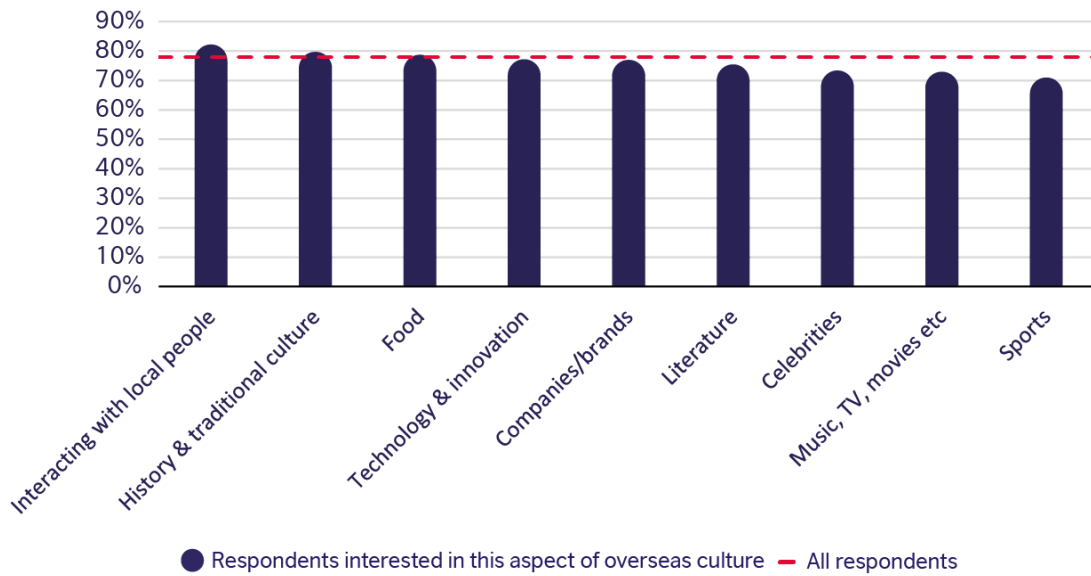
Other countries show an even stronger pattern of differences by cultural interest. The most notable is Korea, which was chosen as the preferred overseas study destination for 45 per cent of students who named celebrities among their top overseas cultural interests – more than twice the proportion of the overall group that named Korea as their top study destination overall. Looking at other major study destinations, Australia performed highly among those that named sports, companies and interacting with local people among their top cultural interests, while Japan did well with those naming literature and history and the US performed particularly well against people who said that sports were among their top interests when it comes to overseas culture.

Beyond attitudes, there is also a strong connection between physical visits and interest in studying in a country. Dividing prospective students into people who have and have not visited the UK, 41 per cent of those who have visited named the country as their top overseas study destination, almost twice the proportion among those who had never been to the UK.

Attraction to countries for tourism purposes also depends on the type of overseas culture that respondents are interested in. The group most likely to want to travel to the UK were those that named interacting with local people as one of the three most interesting aspects of overseas culture – 82 per cent of this group expressed an interest in visiting the UK compared with 78 per cent of all survey respondents. Those interested in history and traditional culture were also more likely than average to have an interest in UK tourism, with 80 per cent of this group saying they were interested in coming to the country.

Meanwhile those interested in sports, media and celebrities had the lowest chance of wanting to visit the UK, although even the lowest of these groups still had a strong majority in favour with 71 per cent wanting to come to the country.

Figure 45: Interest in travelling to the UK, by interested aspects of overseas culture

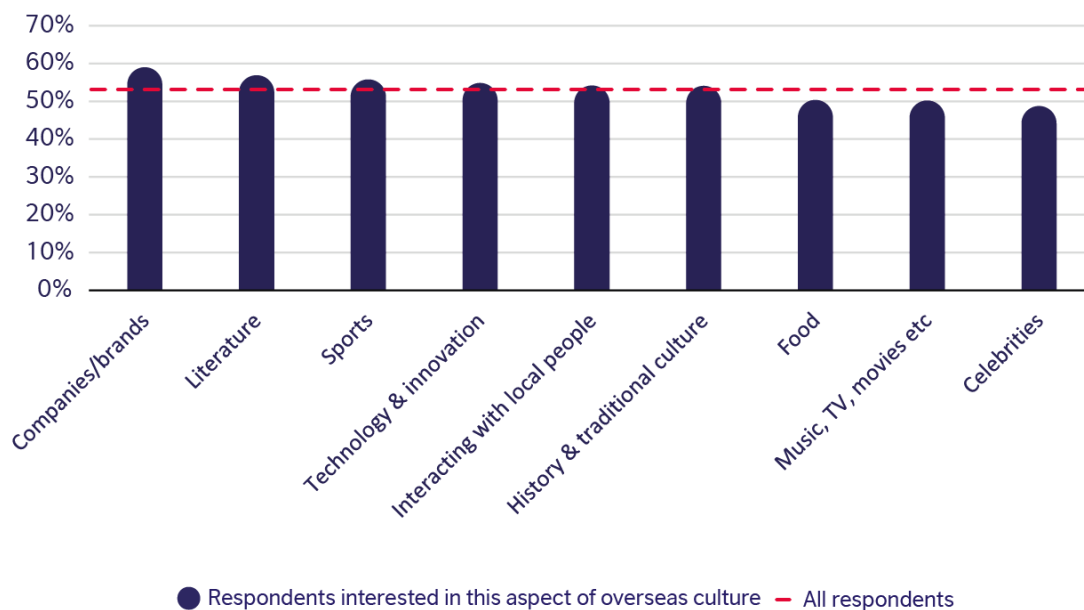


Base: All respondents in Malaysia (1,800 respondents)

Interest in different aspects of culture predicted interest in tourism to different countries. Tourism to Korea was strongly predicted by interest in celebrities, while the top aspect for those wanting to travel to Japan was history and traditional culture.

Looking at the impact of preferred aspects of overseas culture, people who described companies and brands as among their three most interested aspects were the most likely to want to do business with the UK, followed by those interested in literature. The least likely were those who were interested in overseas celebrities or popular media.

Figure 46: Interest in doing business with partners in the UK, by interested aspects of overseas culture



Base: All respondents in Malaysia (1,800 respondents)

5. CONCLUSIONS

This report has shown that, while Malaysians report a relatively strong level of interest in overseas culture, the UK is not seen as one of the most attractive countries in terms of culture. While online discussion of different aspects of UK culture was on the whole favourable, only 6 per cent of respondents to a large-scale survey named the UK as having the most interesting culture among a list of overseas countries. This puts the UK far behind Japan and Korea in terms of cultural interest as well as being slightly behind China and Australia.

The UK did perform well in one particular area. Focus group participants, social media discussion and survey results all show that the UK is very favourably regarded in the field of education, with positive comments and a large proportion of prospective overseas students seeing the country as their first-choice destination. In contrast the UK was seen as less competitive in other areas such as media or technology, with focus group participants saying they had little exposure to UK culture or that they found it hard to distinguish the UK's output from other Western countries.

Over the longer term, the relatively low level of interest in UK culture could have an impact on the country's positioning in terms of trade, tourism or even education. Research conducted for this report shows that there is a strong connection between Malaysians' cultural attitudes towards different overseas countries and their attitudes towards studying or living in these countries as well as visiting or doing business with them.

This is true even in areas where respondents do not necessarily see culture as particularly relevant. While only around a quarter of prospective overseas students said that cultural interest was an important factor in their choice of study destination, survey results showed that those who named the UK as having the most interesting overseas culture were almost three times as likely to say that the country was their preferred overseas study destination compared to prospective students as a whole. Similarly, although culture was described as having little to no impact on overseas business activities, people who said they preferred UK culture were seven percentage points more likely to want to do business with the UK compared to the overall proportion of the population.

As noted several times in this report, the survey results discussed in this report are at the very initial stage of the funnel. 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, and the true proportion of Malaysian students going abroad is far lower than the 68 per cent who expressed an interest in this in the survey. It is similarly unlikely that more than half the population would engage in trade or business with the UK, or that most of the 34 per cent of Malaysians who said they were interested in living in the UK long-term would actually move there even if this was a serious option for them.

Nevertheless, this initial level of interest does help to set the initial “default option” when considering studying, travelling or doing business abroad and to determine which countries people consider as part of their decision, as well as inspiring the idea to study or travel abroad in the first place. Changes in Malaysian attitudes towards UK culture could therefore lead to improvements in the number of students coming to the UK as well as more potential business opportunities for UK companies.