



Measuring the cultural dividend

How does interest in overseas culture
impact study decisions in the Philippines?

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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.

RESEARCH AND EDITORIAL TEAM



Jazreel Goh

Director, British Council Malaysia

Jazreel has over 25 years international education experience shared between China, Malaysia, Australia and Hong Kong, and in 2011 she established British Council's Education Intelligence Unit – the first e-marketing platform dedicated to international education research for the global industry. In 2013, she led the development of the UK's flagship outward mobility programme, Generation UK China, which has since led to a 104 per cent growth in British students to China. She was awarded an MBE in 2017 for her services to UK education.

Kevin Prest

Senior Analyst, Education Insights

Kevin leads the Education Insight team's data analysis, providing UK education institutions and other stakeholders with insights and evidence-based recommendations to help them understand overseas markets and develop international partnerships. His work covers international student recruitment, transnational education partnerships and other forms of international education cooperation. Before joining the British Council in 2014 Kevin worked in market research across a variety of industries in China, including telecommunications, chemicals and construction materials.



Matt Durnin

Head of Education Insights

Specialising in the economics of higher education, Matt leads a global team of analysts to provide UK institutions with the data, analysis and insights required to succeed in the rapidly changing international education industry. Since joining the British Council in 2015, Matt has played a coordinating role in establishing more than 30 academic and research partnerships across 15 countries and has helped numerous universities form or revise their international strategies. He has over 12 years of work experience in China and speaks Mandarin.

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1. EXECUTIVE SUMMARY

- This report analyses the link between people from the Philippines' 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.
- People from the Philippines have a very high level of interest in overseas culture, with 89 per cent describing themselves as "very interested" or "somewhat interested" in overseas culture – higher than any of the other five target countries. Despite the impact of Covid-19, the majority of survey respondents said that they had become more interested in overseas culture over the previous year.
- The aspects of overseas culture attracting the most interest are food, history and traditional culture, and technology and innovation.
- In contrast to most other ASEAN countries, demographic factors did not make a great difference to attitudes towards overseas culture in the Philippines. Interest was similarly high between male and female survey respondents, between different age groups, and between people with different levels of household income.
- While interest in overseas culture in general is high, only a relatively small proportion of survey respondents were attracted to UK culture specifically. Only 6 per cent of survey respondents chose the UK as their preferred overseas country in terms of culture, far below the proportion who named Japan or Korea, and ranking 5th overall from a list of 11 overseas countries.
- Nevertheless, awareness of UK culture, and particularly in the areas of entertainment media or literature, was higher in the Philippines than in most other ASEAN countries – although the US was still seen as setting the standard for Western entertainment and the UK was not perceived to be a technology leader in comparison to other Western countries. The UK was described as having a safe, well-mannered and civilised society with a high standard of living, but it was also seen as expensive and some people felt that there may be a lot of discrimination.
- People from the Philippines have a strong interest in overseas study, with around two-thirds of students saying that they are at least a little interested in overseas study and more than 40 per cent who describe themselves as "very interested". Male students and people from the Metro Manilla region were more likely to describe themselves as interested, but the connection with income levels was weaker than in most other ASEAN countries.
- However, this level of interest is far higher than the proportion of students from the Philippines who actually go abroad to study, showing that most prospective

international students are put off by practical considerations like costs, academic or language requirements and the amount of time they would need to spend abroad.

- Among students that say they want to study overseas, around one in ten identified the UK as their first-choice overseas study destination. Though this is substantially higher than the proportion of people who prefer UK culture, it is still well behind other study destinations such as the US. Focus group participants who are actively engaged in preparing for overseas study described the UK as having a strong education system, but view the US as stronger in this regard.
- While most students did not describe culture as one of the most important aspects in their study decisions, there was a strong connection between interest in overseas culture and desire to study overseas, with students who described themselves as more interested in overseas culture also more likely to say they wanted to study abroad. There were also strong links between country preferences in cultural terms and choice of preferred study destination - students who named the UK as their preferred overseas culture were more than five times as likely to name the UK as their first-choice destination compared to the overall group of potential overseas students.
- While most people from the Philippines had little or no experience with overseas travel, survey respondents described themselves as keen to travel abroad in the future and did not see Covid-19 as posing any impact to their future travel plans over the medium to long term. A large majority described themselves as potentially interested in visiting each of the overseas countries asked about in the survey; respondents who expressed a preference for UK culture were correspondingly more likely to say they wanted to travel to the UK. Similarly, higher levels of cultural interest appear connected to interest in engaging with the UK for business, travel and work.
- The link between interest in a country's culture and preference to study in that country means that the low level of interest in UK culture in the Philippines is likely negatively affecting attitudes towards UK study. While the UK's favourability among groups that are more engaged in preparing to study overseas is higher than among the overall population, this initial interest still has an important impact in the consideration process which suggests that greater visibility of UK culture would likely have a positive effect on attitudes towards UK study, as well as other forms of interaction such as travel and business cooperation.

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.

This report is one in a series of reports that will extend and expand on research published by the British Council in 2017, ***Measuring the cultural dividend: How does interest in UK culture affect Chinese study decisions?***, which 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 series will 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 geopolitics, demographic changes and improving HE quality at home will likely cause growth in ASEAN's international student mobility to slow in the 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 students in the Philippines planning to study abroad, returned alumni, parents and young people, conducted in early 2021; and
- 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 was based on posts made in the period between June 2019 and 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 35,790 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 well-being.

Quantitative surveys were distributed in the first quarter of 2021 through an online platform. Users were targeted based on a representative sample of people in the country, taking into account factors such as gender, age and region. A total of 2,000 responses were received in the Philippines, as part of a total of 13,200 responses across all six target ASEAN countries.

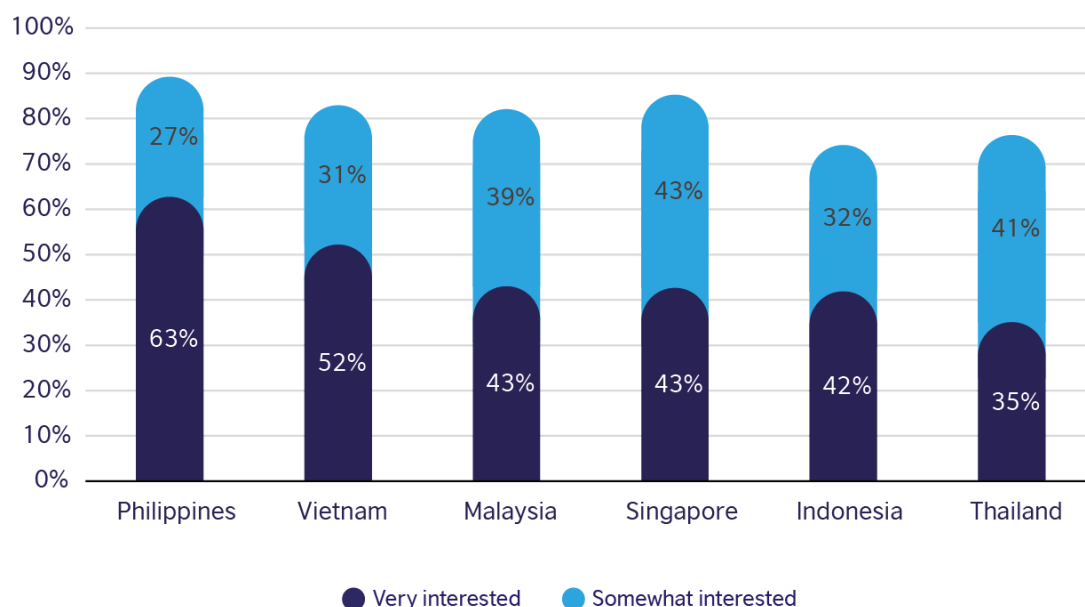
Four separate online focus groups were conducted in the country in late January 2021.

3. INTEREST IN OVERSEAS CULTURE

3.1 Level of interest in overseas culture

Among six ASEAN countries, people from the Philippines were the most likely by far to express an interest in overseas culture, with 63 per cent describing themselves as “very interested.” The next highest response came from Vietnam, with 52 per cent of respondents “very interested” in overseas culture. A total of 89 per cent of survey respondents described themselves as at least “somewhat interested” in overseas culture.

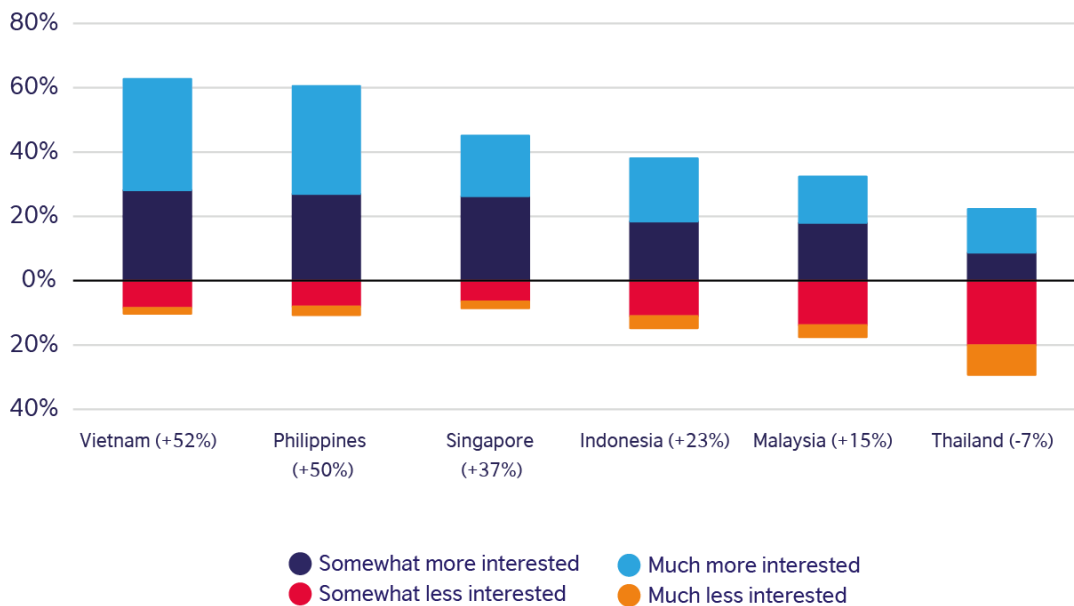
Figure 1: Interest in overseas culture, Philippines vs other ASEAN countries



Base: All respondents (2,000 respondents in the Philippines / 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 prior. As well as having a higher overall level of interest in overseas culture, responses from the Philippines were the second most positive overall in terms of change over this period; 61 per cent of respondents described themselves as having become more interested in overseas culture over the last year compared to only 11 per cent who said the opposite, putting the country second in the region in terms of net change.

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



Base: All respondents (2,000 respondents in the Philippines / 13,200 respondents total)

Four focus group discussions were held in each country, involving groups of prospective overseas students, parents of students considering overseas study, returned overseas graduates and a broader selection of young people.

In the Philippines, focus group participants’ strongest associations when asked what they associated with “overseas culture” were local people’s identity, traditions, customs and lifestyle. Focus group participants commented that these included the way locals live their everyday lives; their values, norms and beliefs; and their cultural backgrounds and influences.

Focus group participants also described relationships and social behaviour as an important element of culture, including how people interact with each another and how open they are to foreigners. Meanwhile a country’s history and heritage was also described as very strongly linked to its culture, including architecture / buildings, religion, festivals and family traditions.

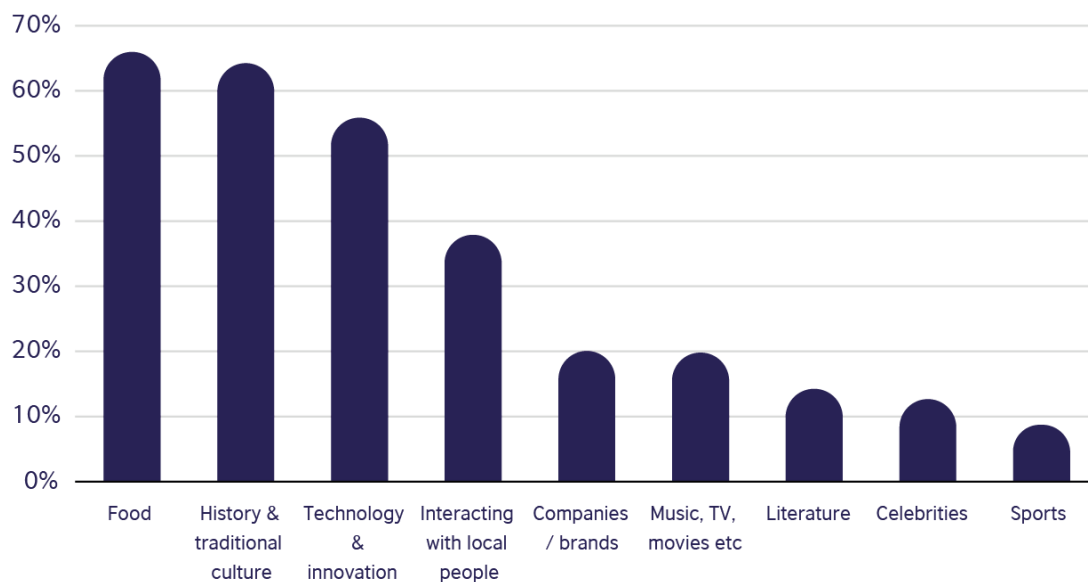
The country mentioned the most when people were asked about countries with an attractive culture was Japan, which was renowned for its safety, the discipline and politeness of its people and its high-quality infrastructure. Interest in specific overseas countries’ culture is discussed in more detail in Section 3.3 of this report.

When survey respondents in the Philippines were asked what they found most interesting about overseas culture, the top answer chosen from a list of nine was food. Overall, almost two thirds of respondents named this as their top interest, slightly ahead of a country’s history and traditional culture, which was chosen by 64 per cent.

Technology and innovation was the third most popular category, while interacting with local people was ranked 4th, with 38 per cent of survey respondents naming this among

their top three cultural aspects. Other aspects of overseas culture were comparatively less popular; sports were the least likely to be mentioned, attracting less than one in ten survey respondents.

Figure 3: Interest in different aspects of overseas culture



Base: All respondents in the Philippines (2,000 respondents)

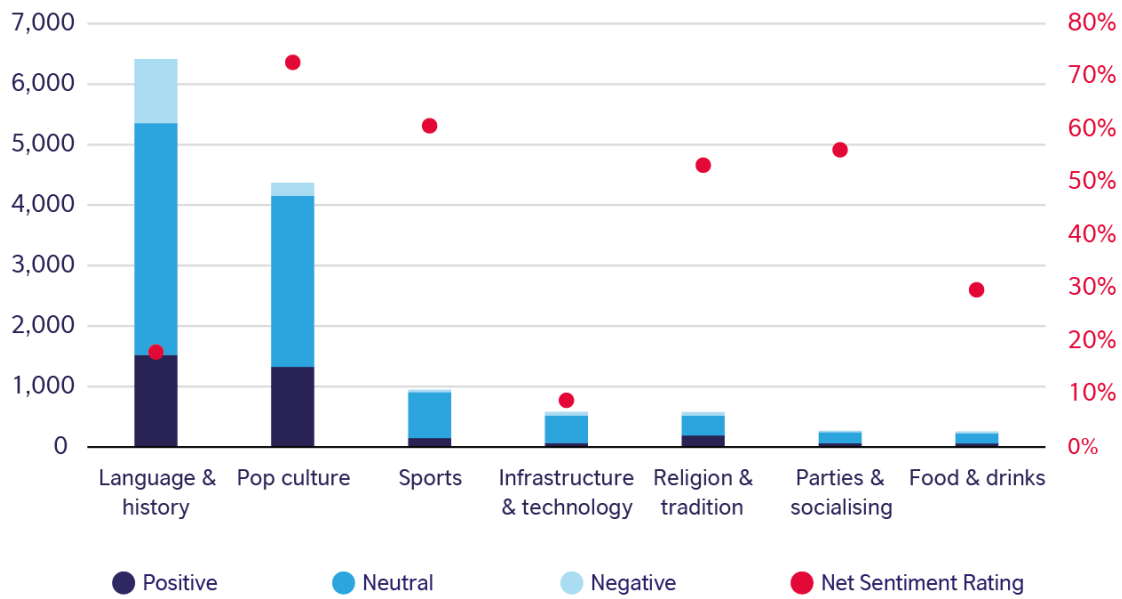
When comparing other countries to the Philippines, foreign entertainment and media were seen as having a particular advantage over local offerings. One focus group participant commented that local dramas have had “*the same plot*” for years, and that “*there are other issues that our country is dealing with and are not being presented*”, while another said that they “*want to see a lot of Filipinos consume more Filipino media that’s intelligent, that promotes critical thinking, that promotes good culture [...] but I’m still finding it very lacking*”. Others expressed similar opinions.

Similarly most focus group participants mentioned that the Philippines had a lot of catching up to do in terms of technology and was not on par with other countries. One commented that “*it’s sad that we don’t have our own*” in a variety of fields such as cars and mobile phones, while others saw people from the Philippines as possessing a hard-working attitude but said that the country lacks investment opportunities and systems to expand their economy. In terms of lifestyle many people criticised the Philippines’ quality of life, including overwork, poor infrastructure, poverty and a lack of safety and security.

Data analyses was carried out from social media posts relating to cultural topics in three major overseas countries: the UK, the US and China.

The top fields of discussion were language and history, which corresponds with the popularity of history and traditional culture in the survey results; a large number of posts pertained to popular culture, e.g., music, television programmes and movies. Other culture-related topics drove much less online discussion.

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

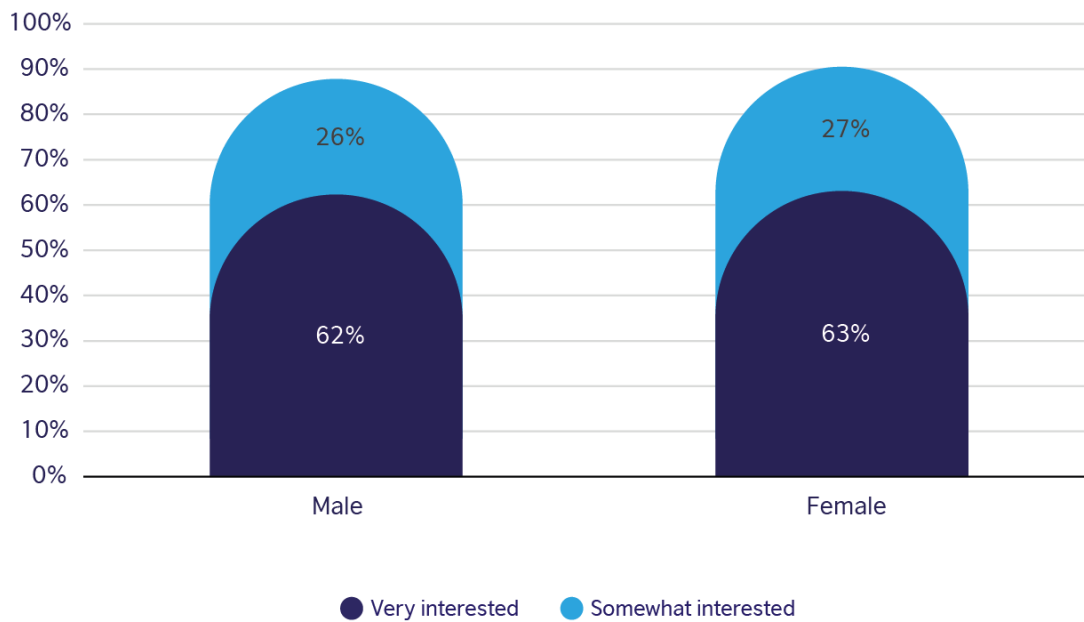
Analysis shows that the net sentiment ratio of these posts¹ was most positive for those tagged as related to popular culture. However, positive comments outnumbered the negative ones in all subject areas.

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

3.2 Factors affecting interest in overseas culture

Survey results from the Philippines showed little difference in levels of enthusiasm towards overseas culture based on sex; respectively, 62 and 63 per cent of boys/men and girls/women described themselves as “very interested” in overseas culture. There was no significant gap in the proportion of people describing themselves as “somewhat interested.”

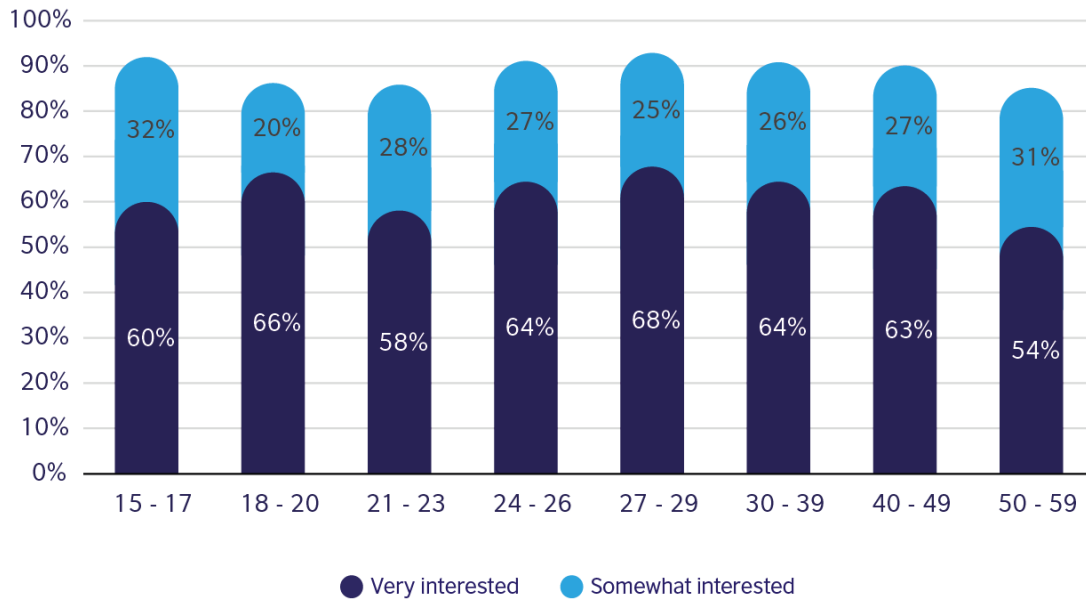
¹ Defined as the number of positive posts minus the number of negatives posts and divided by the total number of posts.

Figure 5: Interest in overseas culture by gender

Base: All respondents in the Philippines (2,000 respondents)

Age was also not a material factor in the level of interest in overseas culture among survey respondents. While people in their late 20s expressed the most interest, with interest falling off on either side of this range, the differences between most age groups were relatively small. One exception were those aged 50+, who were substantially less likely than average to express interest in overseas culture – only 54 per cent described themselves as “very interested” compared to 63 per cent of the overall survey sample. Nevertheless, the overall level of interest in all groups was higher than the ASEAN average, and even in the 50+ group, more than 85 per cent of respondents described themselves as at least somewhat interested in overseas culture.

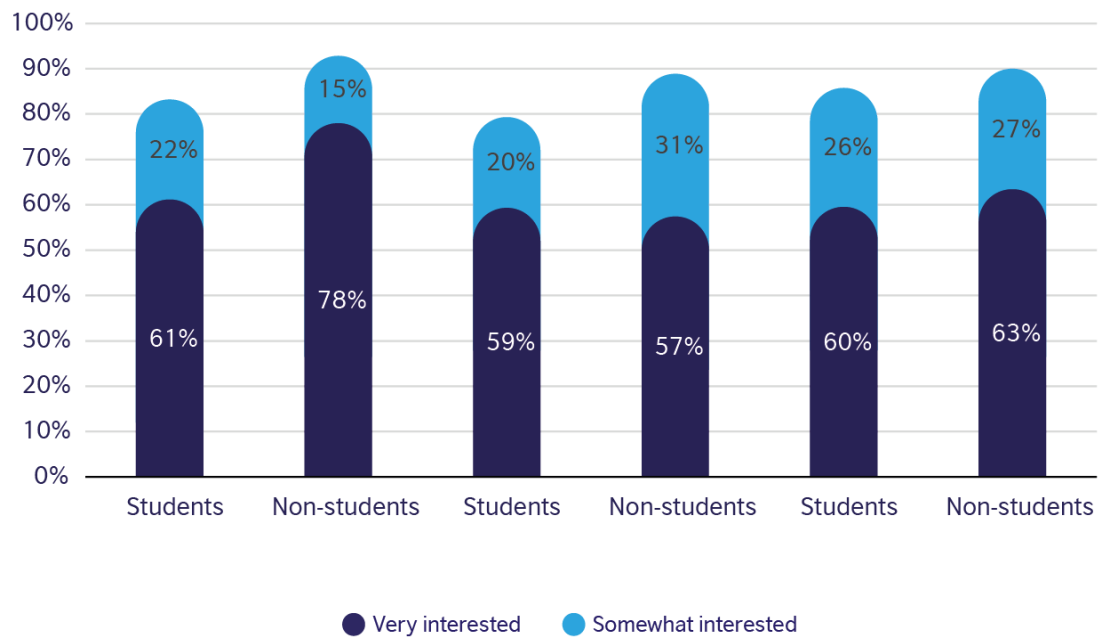
Figure 6: Interest in overseas culture by age



Base: All respondents in the Philippines (2,200 respondents)

In age bands with substantial numbers of both students and non-students – 18-20 and 21-23 – non-students were somewhat more likely than students to express an interest in overseas culture. Total interest across non-students at all ages is also slightly higher than among students, driven by both this factor and by an overall higher level of interest around the late 20s age range.

Figure 7: Interest in overseas culture by age and student status

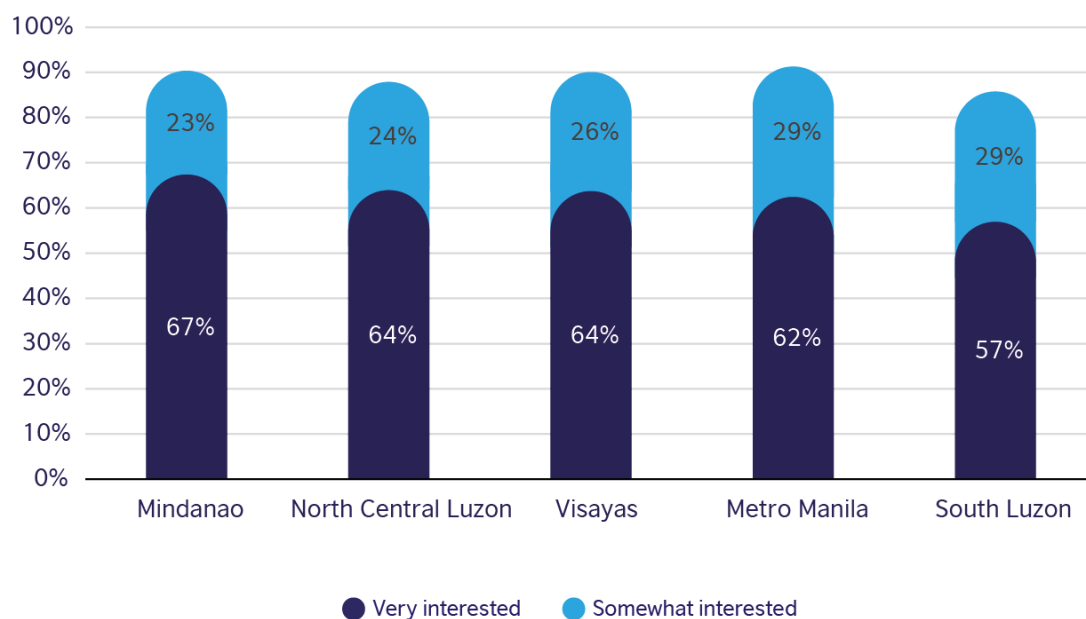


Base: All respondents in the Philippines (2,000 respondents)²

A regional comparison of survey results shows that interest in overseas culture is quite diffused in the Philippines. Unlike survey results obtained from other ASEAN countries, the level of interest in foreign cultures is not concentrated in its capital and does not differ greatly by region.

The exception is South Luzon, where people were noticeably less likely than the national average to describe themselves as “very interested” in overseas culture.

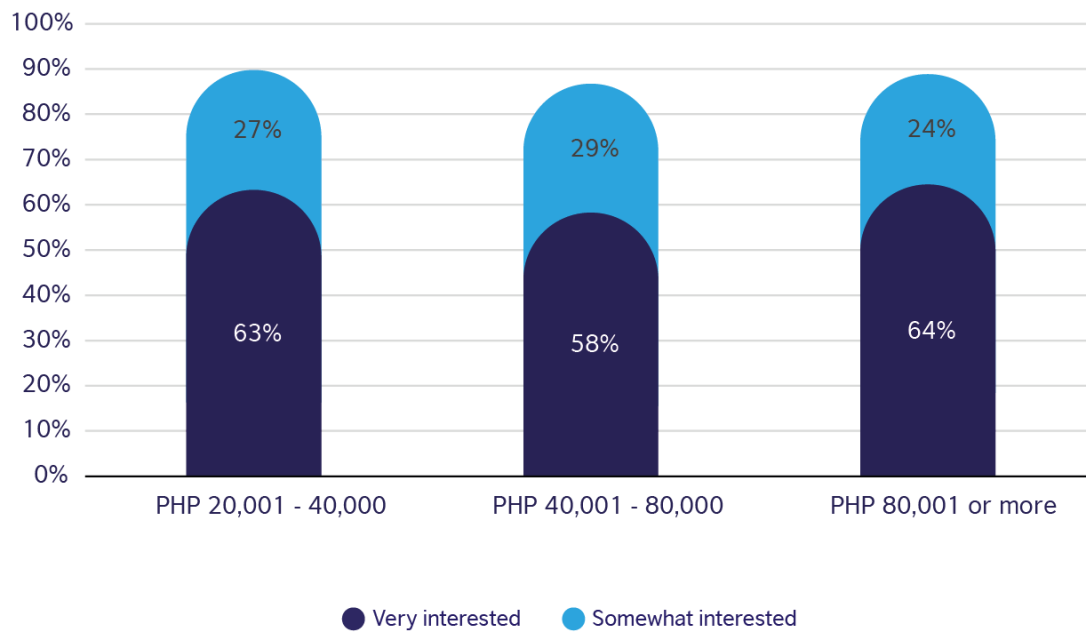
Figure 8: Interest in overseas culture by region



Base: All respondents in the Philippines (2,000 respondents)

In contrast to most other parts of ASEAN, overseas cultural interest among survey respondents in the Philippines had little relationship with household income. People with household incomes above PHP 80,000 (£1,200) per month were slightly more likely than average to describe themselves as very interested in overseas culture, but the second-highest level of interest was not in the middle-income group but among those with monthly household incomes below PHP 40,000 (£600).

² Comparisons for age groups above 23 and below 18 are not shown, due to low numbers of student and non-student respondents respectively

Figure 9: Interest in overseas culture by monthly household income

Base: All respondents in the Philippines (2,000 respondents)

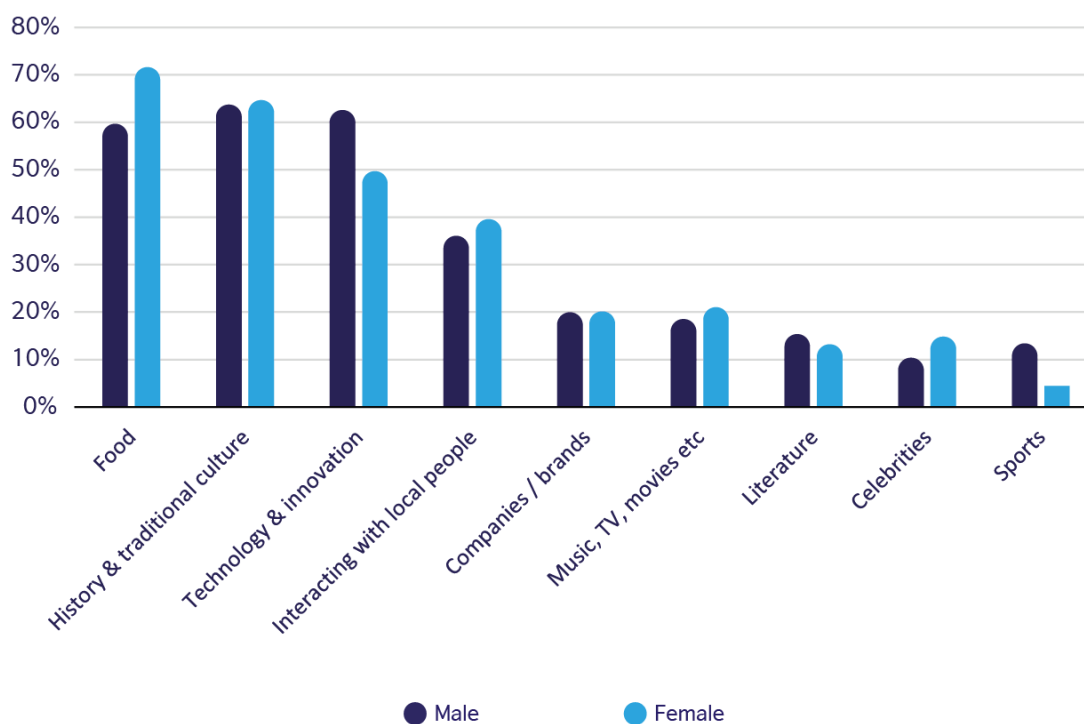
Survey participants' change in interest over the last year also had no consistent trend by income or sex.³

Age did have an impact on this question, with younger respondents more likely to say that their level of interest had increased over the last year, despite the Covid-19 pandemic. However, no group gave an overall net negative response.

Male respondents were 13 percentage points more likely than female respondents to list technology and innovation among the top three aspects of overseas culture they found most interesting; sports had an even larger gap, with more than three times as many male respondents listing this as a top three interest than female respondents.

Meanwhile, female respondents were relatively more likely to name food among their top three interests, as well as celebrities and interacting with local people.

³ As noted in previous sections, the survey was conducted in early 2021

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

Base: All respondents in the Philippines (2,000 respondents)

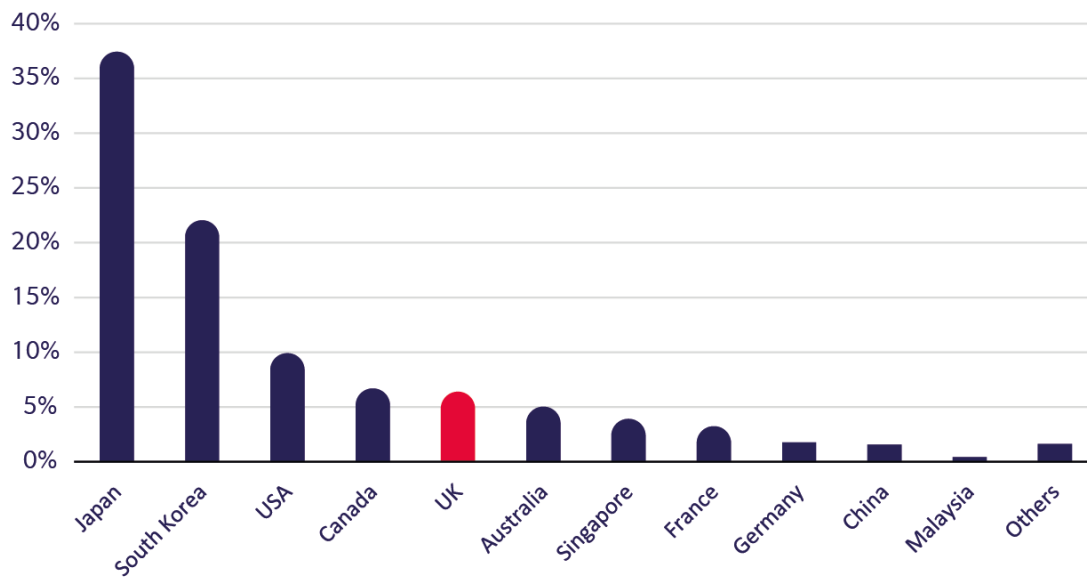
Variation by age is comparatively smaller, although history & traditional culture and interacting with local people are somewhat more popular among older groups, while interest in popular culture such as music, TV and movies or celebrities is less popular among older people in the Philippines.

3.3 Interest in specific overseas countries' culture

As with all other ASEAN countries, Japan stood out as the most attractive in terms of overseas culture to Filipino survey respondents.

Among those who described themselves as “interested” or “very interested” in overseas culture, the proportion who listed Japan as the most attractive in cultural terms was by far the largest. Korea was placed at a distant second, with the US in third.

The UK ranked 5th overall, with 6 per cent of respondents listing it as their preferred country in terms of culture.

Figure 11: Preferred overseas country in terms of culture

Base: Respondents at least somewhat interested in overseas culture (1,782 respondents)

Participants in focus groups expressed similarly positive attitudes towards Japan. The country was described as clean and safe, well-disciplined and with excellent infrastructure while at the same time being gentle, polite, courteous and non-judgmental towards foreigners.

Focus group participants described Japan as having advantages in “*all aspects*”, from the attitudes of the people to the quality of public transport. Japanese anime was also seen as attractive, while the country was also named as a leader in terms of technology with one participant commenting that “*even their toilet has tech*”.

South Korea was also seen as attractive by both survey respondents and focus group participants. The country was seen as having a vibrant and modern lifestyle but still being aware of their history and having respect for elders. As elsewhere in East Asia, South Korean culture was seen as particularly attractive to younger people, driven by an interest in Korean pop music as well as TV dramas. A typical comment was a student who described recent changes in Korean culture as “*just inspiring [...] It’s not changing entirely but it’s including the changes of the modern times*”.

Other countries were seen as attractive for their lifestyles – especially Australia and New Zealand, which were seen as having more relaxed ways of living – or for their history, with focus group respondents referring to a broadly-defined “Europe” as having centuries-old traditions, heritage and history. Meanwhile the US was seen as attractive in numerous ways including having a wide variety of high-quality entertainment content, being a world leader in terms of technology, and having top-ranked universities.

The UK was not mentioned when people in the Philippines were asked a broad question on the attractiveness of different overseas countries’ culture but was named when specific aspects of culture were discussed.

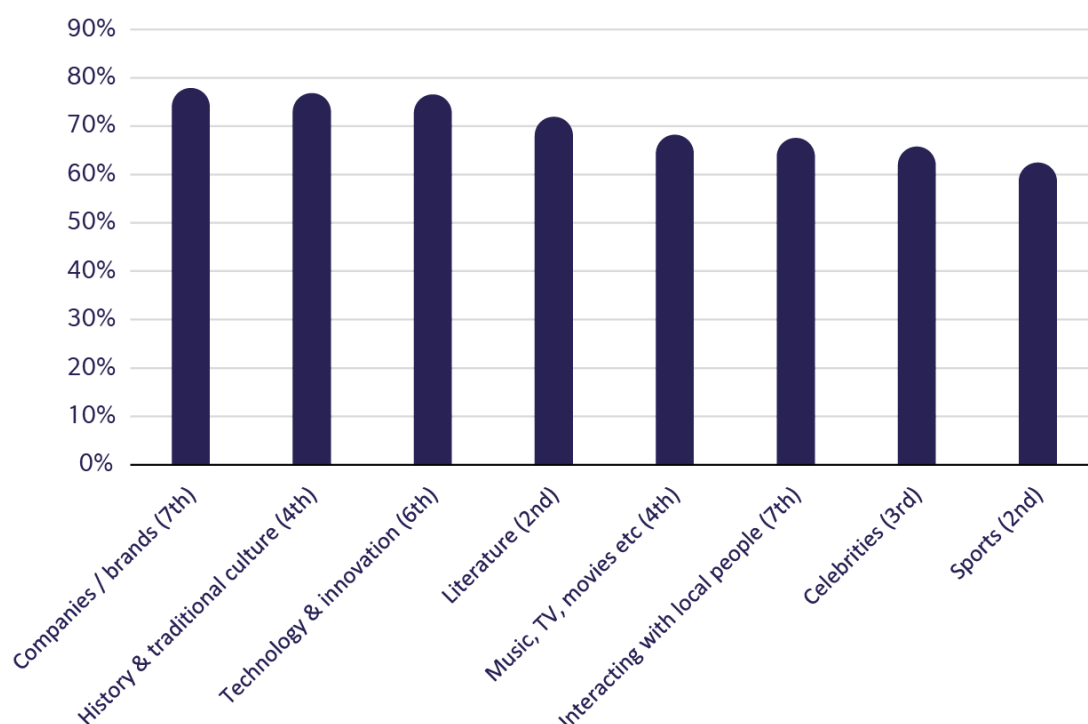
The UK was described as having a safe, well-mannered and civilized society, but it was also seen as having a high cost of living and some people felt that there may be a lot of discrimination. Other perceived features of the UK included a high-quality but expensive education system, quirky and unique humour and a good music scene.

When survey respondents were asked about countries' attractiveness in terms of specific aspects of overseas culture, the fields in which the UK had the strongest performance relative to other overseas countries were literature and sports. In both of these areas, the UK was ranked as the second-most attractive overseas country, behind Japan and the United States, respectively.

Aside from literature, Japan also led in four other fields: technology, history & traditional culture, companies & brands, and interacting with local people. South Korea led in two areas: celebrities and popular media, such as music, film and TV.

Aside from the UK's strength in literature and sports, it was also described as attractive in terms of celebrities, and ranked 4th in terms of history & traditional culture, and popular media.

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



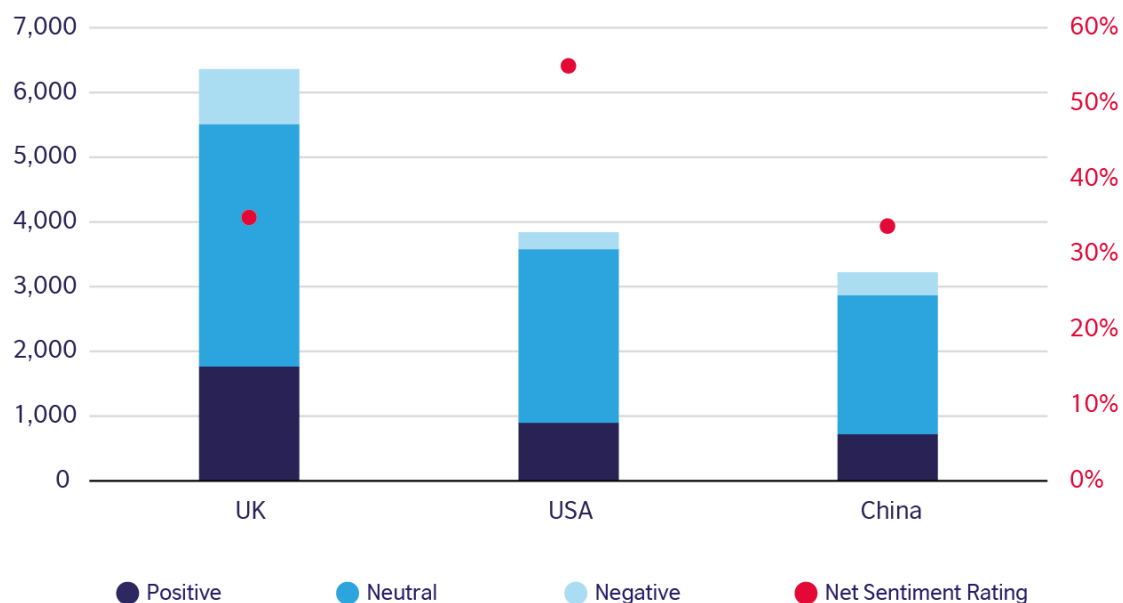
Base: All respondents in the Philippines (2,000 respondents)

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 people from the Philippines; 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 food from the Philippines; drinking culture

The largest share of posts from the Philippines on this broad collection of topics were related to the culture of the UK, followed by posts about the United States. However, the highest net sentiment ratio (NSR)⁴ was seen for US-related posts, with those discussing the UK having similar sentiment overall to those discussing China.

⁴ 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 13: Social media post volume and net sentiment ratio by overseas country (UK, China & USA)

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

Looking more closely at these particular fields, the UK's advantage can be attributed to the number of posts related to language and history, often in discussion of English accents.

Some mention a fascination with the accents used by celebrities and actors in movies, tv shows and music, with any post of this kind assessed as showing positive sentiment.

However, others feel harshly judged on how well they speak and on their own accents, in the UK. Perceived inability to sometimes understand and process a foreign accent and a sense of embarrassment when trying to converse creates negative sentiments.

Posts about history include discussions of the Philippines as a former US colony; people feel that the Philippines' true history has been misrepresented and hidden, and that they must hide it to blend in while in the USA. Other social media conversations express a positive sentiment about this history, specifically the advantage of the widespread use of English.

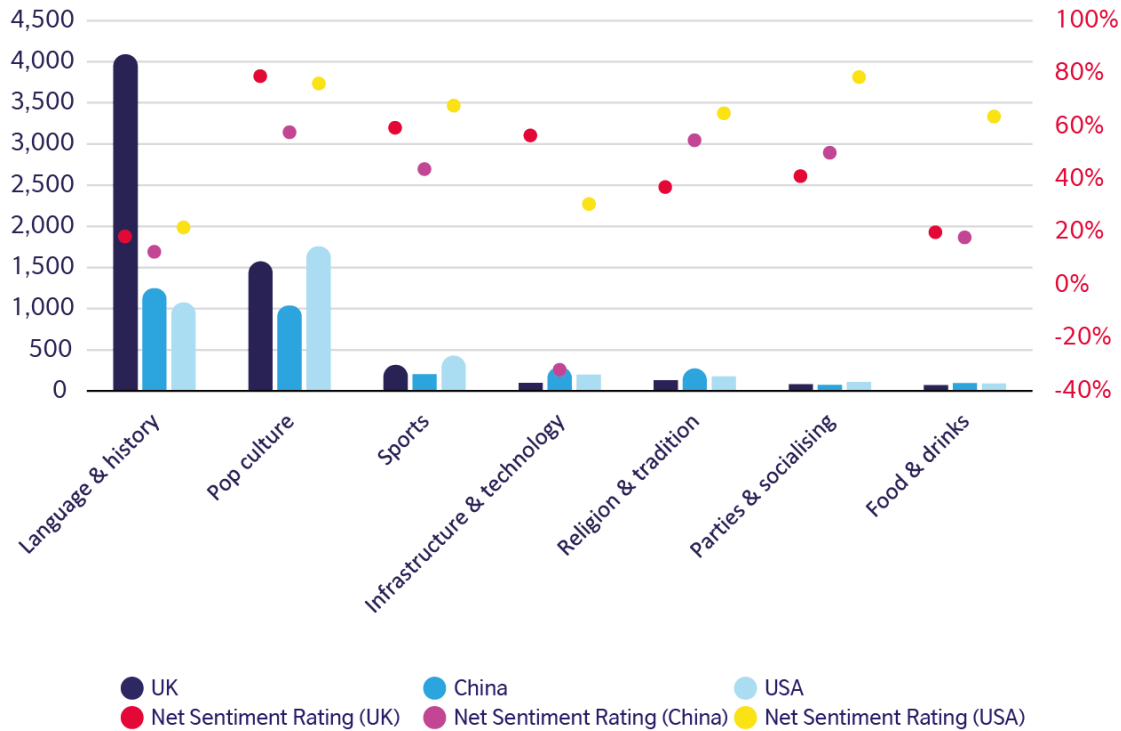
Fashion events and trends in the US, UK and China were topics of interest amongst Filipino netizens in social media analysis, specifically New York Fashion Week, the British fashion industry and Chinese street fashion. Harry Potter and Peppa Pig were also topics of interest, and positive sentiments were expressed in relation to celebrity and music industry and award show news.

Discussion about sports were dominated by basketball and the NBA; other sports discussed in social media posts include football and cricket.

China dominates discussion about infrastructure and tradition. Sentiment in this regard is mixed, with many negative posts related to infrastructure and development partnerships between the Philippines and Chinese authorities.

However, discussion of Chinese traditions like Chinese New Year, Mid-Autumn Festival and the Dragon Boat Festival showed more positive attitudes.

Figure 14: Social media post volume and net sentiment ratio by overseas country and aspect of culture (UK, China & USA)



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

3.4 Strengths and weaknesses of different overseas countries

When focus group participants were asked about their perceptions of the UK, the Royal Family and the British Empire were frequently mentioned. There was a common perception that British people were elegant, polished and well-mannered.

The UK was also described as having a rich history with many museums and as strong in the arts. These were seen as having an impact on British cultural products such as literature and TV dramas – one participant commented that *“in terms of production and drama, the UK has it because culturally they all have the palaces and royal families to talk upon”* and also described UK literature as *“more profound”* than that from the US.

Another top-of-mind answer was that the UK had a strong education system. This response was unsurprisingly more common among people who were interested in overseas study, and is discussed in more detail in Section 4.

When discussing different countries’ media, there was relatively high awareness of UK music and TV content among Filipino focus group participants compared to many other ASEAN countries. British comedy was particularly admired – some saw the UK as having quirky or unique humour, with comments such as *“the self-deprecating humour is nice about UK comedy”*. Others mentioned that the UK made good historical dramas or that they enjoyed British music.

However, while perceptions of UK television programmes were positive, focus group participants generally held American content as the standard in entertainment. Others, participation in younger groups, had difficulty differentiating between UK and US-sourced media. For example, a student commented that *“I’m not so sure if the shows I watch are from UK”* before going on to clarify that they did not have a strong impression of UK entertainment, seeing it as *“typical[ly] Western, the same as the States”*.

More broadly, focus group participants in the Philippines– again, especially young people – had relatively low awareness of other aspects of the UK, such as the living environment, lifestyle, working environment and social behaviour. Many had the impression that British people were “a bit conservative” or that they had aristocratic attitudes in the way they treated other people, which were seen as negative traits; some saw these as creating a divide in British society and as a leading cause of Brexit.

People commented that the country had a high standard of living – mentioning safety, good public medical care, a good education system and a stable government – but that this meant that the UK was an expensive place to live or visit.

The UK was not perceived to be a leader in technology or innovation. A typical example was a young person who said *“the European countries are all similar I guess”* – the UK’s position as a developed Western country implied a certain level of technological advancement but focus group participants were not aware of any particular advantages beyond this. Meanwhile British cuisine and the country’s climate both had a negative reputation.

With regard to other countries, the American entertainment industry was seen as particularly attractive, with high exposure through platforms such as cinemas, YouTube and Netflix. It is also seen as a tech leader, producing and funding innovative companies and brands.

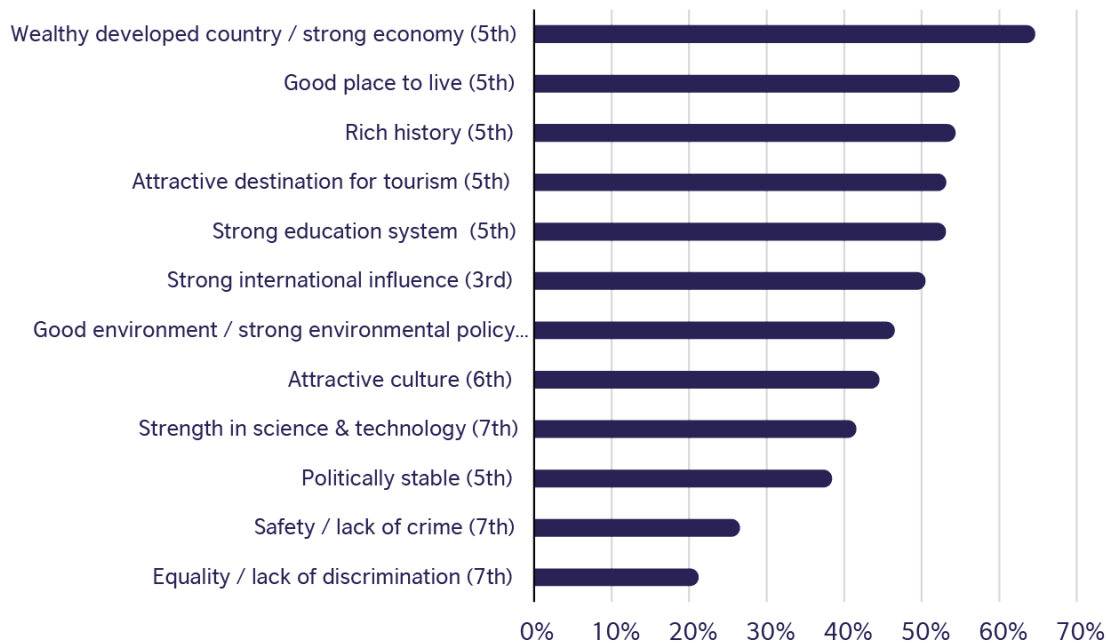
South Korea was viewed positively in terms of pop culture content, particularly through K-pop, television dramas and variety shows.

Other countries seen as strong in technology included Germany, especially its automotive industry and, more broadly, engineering; South Korea and Japan, which were seen as having strong brands and world-class technological development; and China, which was described as having advanced technology but lacking original innovation.

When asked to choose different countries’ strengths and weaknesses from a list, survey results showed that in most areas the UK’s performance was not as strong as several other overseas countries. Among 12 possible strengths there was only one – “strong international influence” – where the UK placed in the top three.

The UK ranked 5th in six other areas, including its economic strength, attractiveness as a place to live, the richness of its history, attractiveness as a tourism destination, education quality and political stability. However, the UK was also not seen as especially unattractive in any area, ranking no worse than 7th in any area among 11 target countries.

Figure 15: Perceptions of UK strengths



Base: All respondents in the Philippines (2,000 respondents)

Japan topped the list in six of 12 categories among survey respondents: history, economic strength, strength in science and technology, attractiveness as a tourism destination, overall cultural attractiveness, safety, and good environment.

Japan also came a close second behind South Korea as an attractive tourism destination, while the US was ranked top for its education system and international influence.

Three other countries each led in a single category: Australia was the most likely to be named as being a good place to live, Singapore had the highest proportion of survey respondents agreeing that it was politically stable, and Canada was commonly described as having an advantage in terms of equality and lack of discrimination.

The area where the largest proportion of people felt the UK had a distinct disadvantage was in terms of racial or socio-economic discrimination. A little over a third of respondents in the Philippines agreed that the UK was at a disadvantage here, behind the US and China but higher than any other country. The UK was also the 3rd most likely country to be described as unsafe, again behind the US and China, although in this case only 18 per cent of people agreed.

Figure 16: Perceptions of UK weaknesses

Base: All respondents in the Philippines (2,000 respondents)

3.5 Perceptions of people from different countries

As noted above, most survey respondents from the Philippines do not have direct experience interacting with British people, but the general stereotype is linked with aristocracy and conservatism. This has both positive and negative aspects. The positive side of this stereotype is that British people are seen as elegant, well-mannered and polished, and this likely also contributes to the perception of the UK as having elite education.

However, the same stereotype is also associated with perceptions of being arrogant, cold and aloof, while some people perceive the likelihood that British people will discriminate against Asians.

Others see Brexit as evidence that some British people are conservative or that there are social divisions in the country. Nevertheless, not all people agreed, with some – including those that have previous experience of visiting or studying in the UK – describing the people as friendly.

Focus group participants also had relatively little experience of people from other countries, again describing them in broad terms based mainly on general impressions rather than personal experience. For example, Japanese people were described as disciplined, gentle, polite, courteous and non-judgmental, while Australians and New Zealanders were thought to be laid-back and relaxed.

Survey respondents were also asked about their perceptions of British people. Among 12 statements, the most commonly agreed upon was that people from the UK are “proud of their country” (61 per cent) and “value their culture” (55 per cent), followed by a description of British people as friendly and hard-working (both 47 per cent).

The statements with the least agreement were descriptions of British people as uninterested / distant and racist / intolerant, with only 8 per cent and 11 per cent of respondents agreeing with these descriptions, respectively.

On most of these questions, results for the UK did not stand out from other overseas countries included in the survey. However, British people were more likely to be described as racist than people from most other overseas countries, apart from the US and China, while less likely to be described as hard working than people from most other countries.

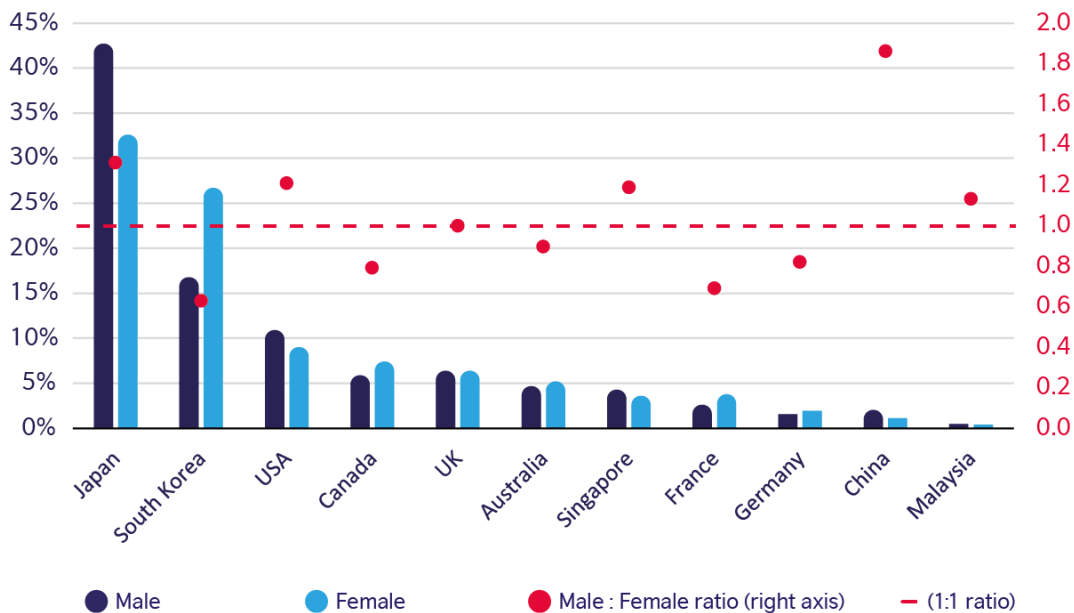
3.6 Factors affecting interest in different countries

Demographic factors, specifically sex, within the respondent population had a clear effect on their interest in some overseas countries.

On the question of preferred overseas country in terms of culture, for example, the gap between the top two countries was notably larger among male survey respondents, where 43 per cent named Japan and only 17 per cent named South Korea, than among females, where the gap was only 33 to 27 per cent, respectively.

The US and China were also somewhat more popular among males, while Canada and France had a slight gender gap in favour of female respondents. However, interest in the UK seemed to be balanced between both genders, with 6 per cent of each group naming this as their preferred overseas country in terms of culture.

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



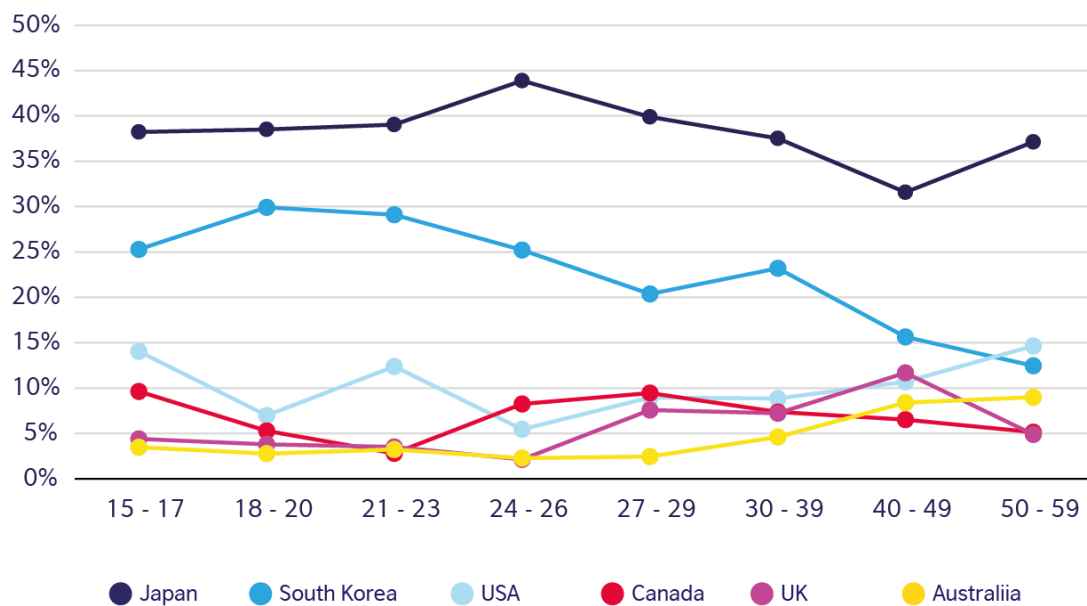
Base: Respondents at least somewhat interested in overseas culture (1,782 respondents)

An analysis of trends among different age groups shows a strong relationship between age and interest in Korean culture. The proportion of younger people in the Philippines preferring Korean culture is far higher than in their parents' generation. In comparison, the UK is more popular among people in their late 20s and above.

Australia and Canada also increase in popularity with age, while interest in the United States is highest among both the youngest and oldest groups compared with those towards the middle of the age distribution.

Focus group discussions showed a similar trend, with interest in Asian countries being comparatively higher among younger people while older participants were more likely to describe an interest in Western countries.

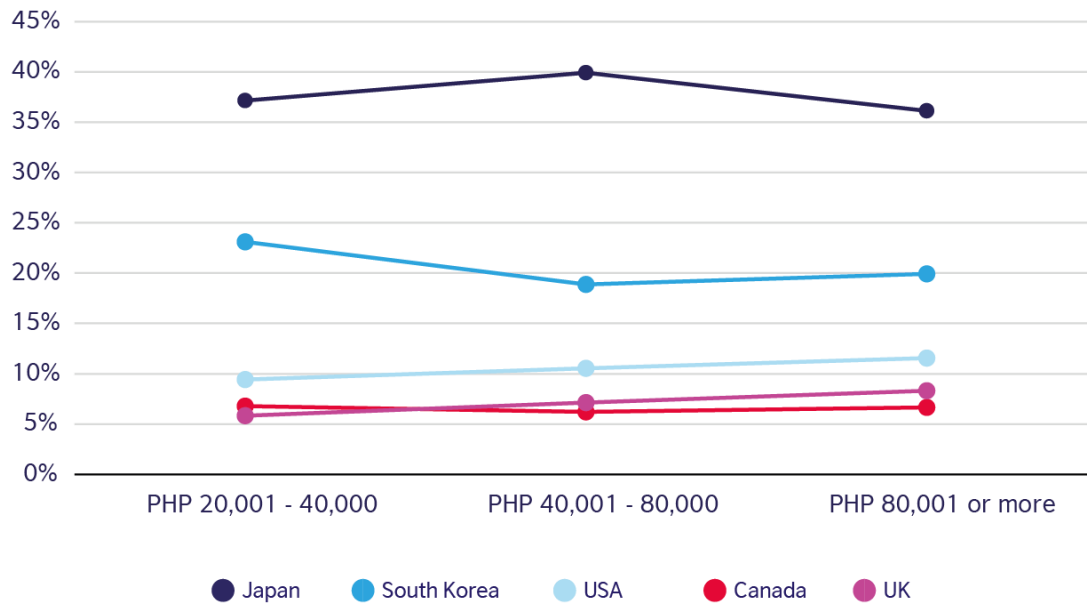
Figure 18: Preferred overseas country in terms of culture, by age



Base: Respondents at least somewhat interested in overseas culture (1,782 respondents)

Analysis by income level shows that survey respondents in the lowest household income band were more likely than other groups to say that they had a preference for Korean culture. Meanwhile, higher incomes were connected with a higher probability of preferring UK culture as well as that of the United States.

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

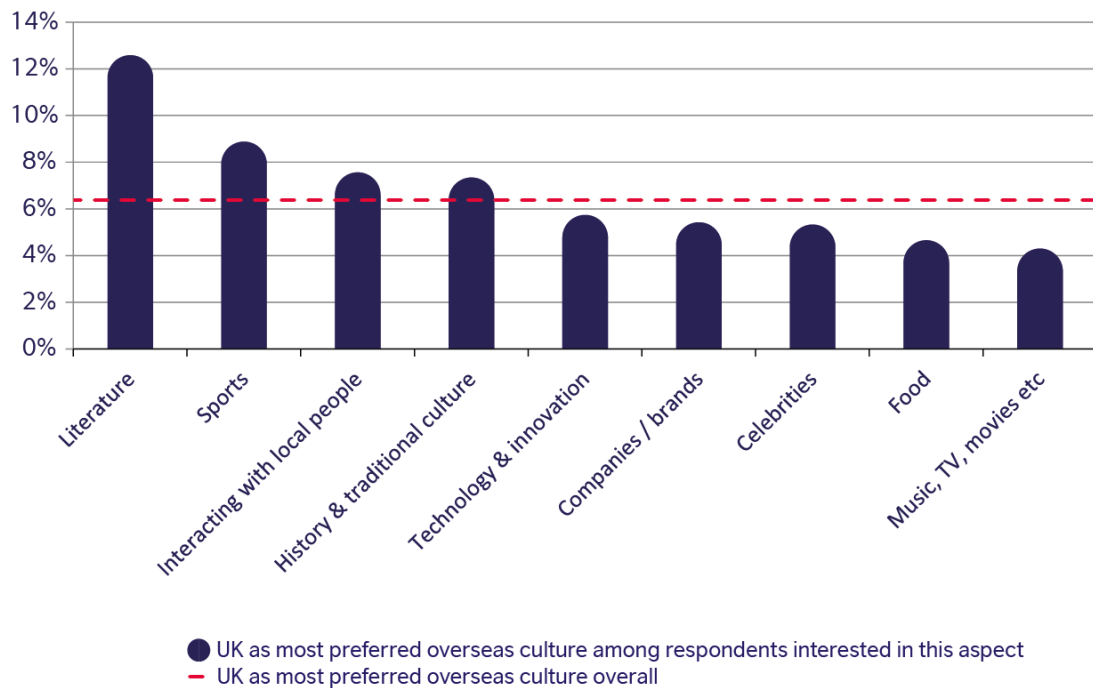


Base: Respondents at least somewhat interested in overseas culture (1,782 respondents)

Perceptions of the UK were noticeably more positive among people describing themselves as interested in overseas literature. The proportion of people in this group naming the UK as their preferred overseas culture was roughly double that of the overall survey sample.

An interest in overseas sports was also linked to a higher level of interest in the UK, while survey respondents naming food or popular media among their areas of interest were the least likely to name the UK as the most attractive country in cultural terms.

Similarly, while Japan was the country seen as most attractive by survey respondents, it performed particularly strongly among people interested in technology, but fell well behind South Korea among those who named celebrities as one of their main cultural interests. South Korea was also the most-preferred country among people interested in overseas media. Meanwhile, the United States was substantially more likely to be seen as the most attractive culture among people who named sports among their interests – 22 per cent of this group preferred US culture compared to only 10 per cent overall.

Figure 20: Preference for UK culture by interest in aspects of overseas culture

Base: Respondents at least somewhat interested in overseas culture (1,782 respondents)

These findings mirrored perceptions of the strengths of different countries. As described in Section 3.3, surveys and focus group discussions showed that literature and sports were the two fields in which the UK had the strongest performance relative to others, while Korea was known for its celebrities and media.

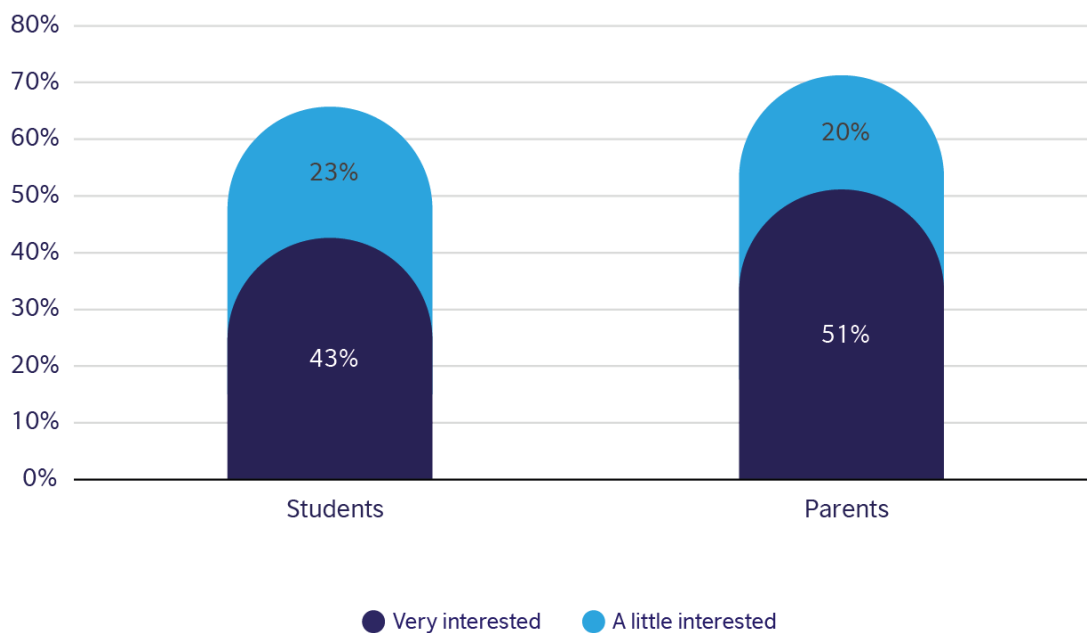
4. THE EFFECT OF CULTURAL INTEREST ON INTERACTION WITH OVERSEAS COUNTRIES

4.1 Interest in overseas education

Survey results show a strong level of interest in studying abroad among young Filipinos. Overall, 43 per cent of surveyed students from the country said that they were “very interested” in studying overseas, while almost two thirds described themselves as at least “a little interested.”

Parents had even more positive attitudes, with more than half describing themselves as “very interested” in having their child study overseas, while 20 per cent were at least “a little interested.”

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



Base: Students (379 respondents) and parents (1,087 respondents)

Survey results show that students at all levels of study have a strong interest in studying abroad. The highest level of interest was in the 18-20 age group, where 45 per cent of students described themselves as “very interested” in studying abroad; this proportion was also relatively high in the 21+ age group while being somewhat lower among students aged under 18.

Survey analysis additionally shows that male students are slightly more interested in studying abroad than their female counterparts; overall, 46 per cent of male respondents said they were interested in studying abroad compared to 40 per cent of female students.

Parents also showed a similar gender gap to students, with fathers being significantly more likely than mothers to want their child to study abroad. Overall, 55 per cent of

fathers said they were very interested in having their child study outside the Philippines, while only 47 per cent of mothers said the same thing.

The levels of reported interest in studying abroad are much higher than the number of students who actually do. Data from UNESCO reports slightly under 19,000 students from the Philippines enrolled in tertiary education overseas in 2018, representing only around half of one per cent of the country's domestic tertiary student population.

Data from HESA shows that the majority of full-time students from the Philippines studying higher education courses in the UK were enrolled on postgraduate programmes. Meanwhile, despite the penchant of male survey respondents to profess higher interest in studying abroad, HESA data reveals that around 61 per cent of enrolled students in the UK from the Philippines were female in the 2019/20 academic year.

The substantial gap between survey findings and actual overseas study decisions shows that students are likely only expressing a broad initial interest in overseas study rather than actively planning to go abroad. Most of these students will eventually decide not to study abroad, due to constraints that include tuition fees, difficulty meeting academic requirements, or not wishing to be away from home for a long period. Nevertheless, an initial interest in studying abroad is an important first step in overseas study decisions.

Focus group discussions included groups with a higher overall level of interest and awareness in overseas study, including students preparing to study abroad, parents of students planning to study abroad and returned graduates, as well as other young people. The level of interest in overseas study was high among all groups, including young respondents.

Students wanted to level up their academic qualifications in order to obtain opportunities to work and live in other countries after graduation. Focus group participants said that the current Covid-19 situation did not have any impact on their future interest to further their studies abroad.

In general, students from the Philippines saw overseas universities as having higher educational standards, being more prestigious, and awarding qualifications that are valued more highly than local institutions. One student summarized local companies' attitudes by commenting that *"I'm not saying that they don't recognize Philippines education, but other countries' education is being recognized more and the degrees that you earn in the other countries are being valued more"*.

Students and their parents also saw overseas countries offering opportunities to thrive professionally after graduation. Unlike prospective students from most ASEAN countries, students from the Philippines do not face a significant language barrier when studying in countries like the UK or US as the local education system also uses English as a medium of instruction.

Household incomes are less predictive of attitudes towards overseas study in the Philippines compared to many other ASEAN countries. Dividing survey respondents into three levels, students with monthly household incomes in the upper two bands – PHP

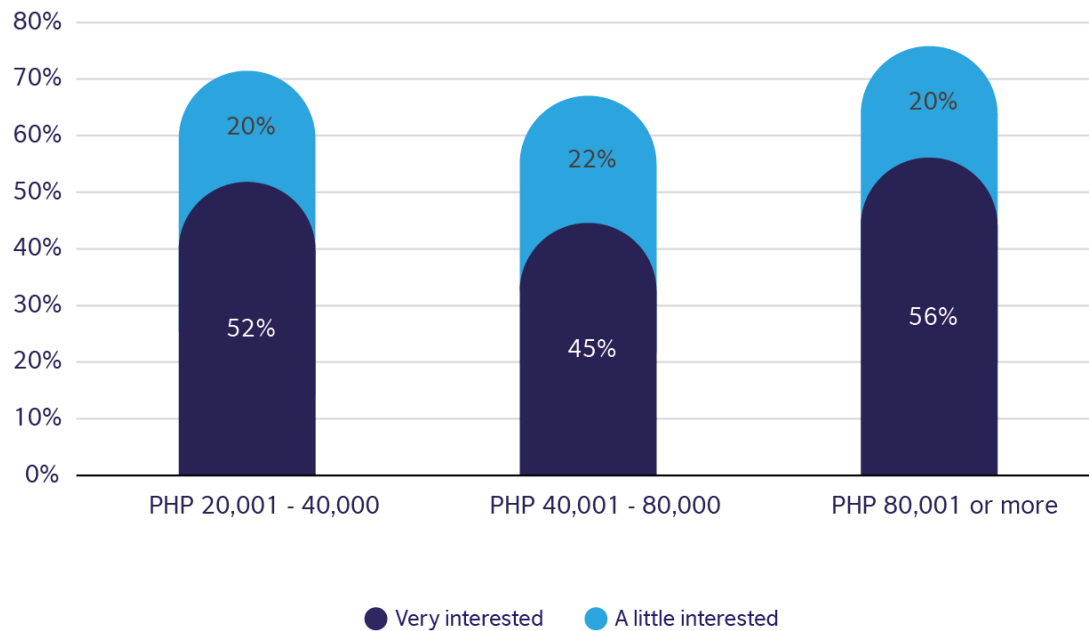
40,001 to 80,000 and over PHP 80,000 – were more likely to describe themselves as very interested in overseas study than those whose families earned PHP 40,000 a month or below; however, the highest-income category was not the group with the highest level of interest overall.

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



Base: Students (379 respondents)

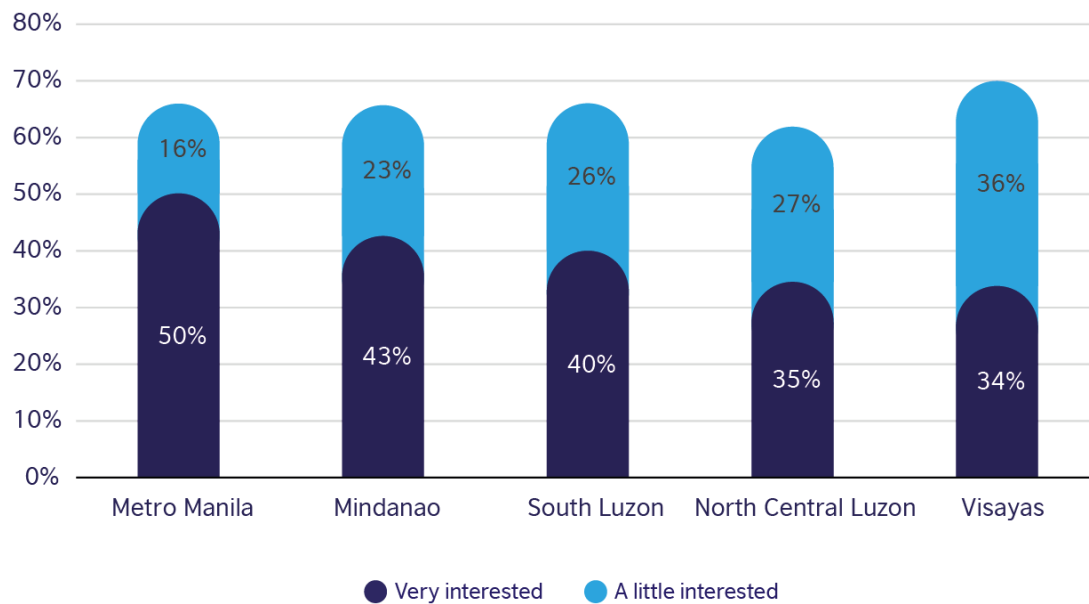
As with students, parents did not show a consistent increase in interest in sending their children abroad as incomes increased. While parents in the highest income group were more likely than average to want their children to study overseas, parents in the lowest income group were more likely than those in the PHP 40,001 – 80,000 range to say they were very interested in this option.

Figure 23: Parents' interest in overseas study for their children by monthly household income

Base: Parents (1,087 respondents)

The inconsistent relationship between household income and interest in overseas study confirms that survey responses are measuring students' initial level of interest rather than serious overseas study intentions. However, survey results also show that this initial potential interest is high among all segments of society.

Meanwhile, location had a relatively stronger effect on interest in overseas study. Half of surveyed students in Metro Manilla described themselves as "very interested" in overseas study, compared with an overall average of 43 per cent. The lowest proportions were in Visayas and North Central Luzon, where 34 and 35 per cent of students respectively described themselves as "very interested" in overseas study.

Figure 24: Students' interest in overseas study by region

Base: Students (379 respondents)

When deciding on an overseas study location, the two most important factors to survey respondents were quality of education and prospects for working in the destination country after graduation. Students saw these two factors as roughly equally important, while parents were slightly more likely to describe education quality as important.

In contrast to this general student survey, focus group discussions with people actively engaged in overseas study preparations or with previous study experience showed that people in this group placed relatively more weight on education quality.

The factor seen as most important in these groups was the reputation or ranking of target universities, as certificates from renowned universities are seen as more helpful for potential job prospects. Other education-related factors were seen as the second most important factor, with participants mentioning study methodology, curriculum contents, course duration and the variety of courses available.

Another important consideration listed by focus group participants was the cost of study, including both tuition fees and other expenses such as accommodation or flights as well as the potential to receive scholarship funding. Slightly over half of student survey respondents and 37 per cent of parents also saw this issue as important, a noticeably lower proportion than those who named education quality or work opportunities as important.

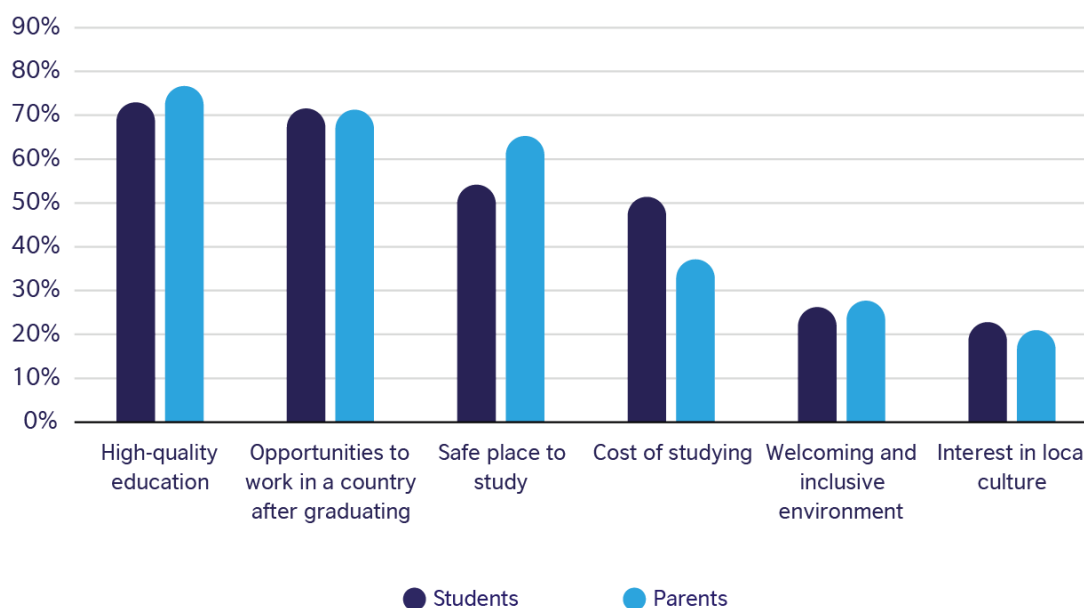
Although work opportunities were lower down the priority list for focus group participants, this does not mean that they were unimportant. Several students saw overseas work – whether during studies, for a short period after graduation to gain overseas experience, or for an extended period to take advantage of higher wages and a perceived higher quality of life abroad – as an important element of their studies, while parents also named this as an important factor.

Other factors mentioned by focus groups included quality of life and family already living in the relevant country as important. The latter factor was especially important to parents who saw relatives as a social support system for their children when studying overseas. Meanwhile survey results showed that a little over half of students and almost two thirds of parents saw safety as one of the most important factors in their decisions.

Perceptions of the country's culture were seen as being of secondary importance. Students' main goal in studying abroad was to graduate and build a brighter future. Culture is important to this goal insofar as it helps students adjust to studying overseas, but distinctly less important than the quality of the educational institution, cost of education and employability post-graduation; only a quarter of students and 31 per cent of parents described this as an important factor in their decisions.

Interest in the local culture was the survey option chosen by the lowest proportion of both students and parents, while focus group participants did not mention cultural factors without being prompted. Section 4.4 goes into more detail on the link between cultural interest and attitudes towards overseas study.

Figure 25: Students' and parents' important factors when considering a country for overseas study



Base: Students interested in studying overseas (250 respondents) and parents interested in their children studying overseas (773 respondents)

When focus group participants were asked about their preferred countries for overseas study, the United States emerged as the clear front-runner in terms of popularity. People from the Philippines have a strong familiarity with US education, partly due to their own education system being based on that of the US. Participants also mentioned elite and top-ranking universities in the US as well as good prospects for graduates to work in the country after they finished their course.

Opinions of focus group participants were echoed in survey responses. The US was the country selected by the largest proportion of those students who expressed an interest

in studying abroad, with 26 per cent of this group naming the US as their first choice and a further third saying that they would consider studying in this country even though it was not their top preferred destination.

Despite the overall preference for the US, the priority for participants was for a “branded university” with a strong world ranking. Australia and New Zealand were named as good choices by focus group participants due to their good courses combined with abundant work opportunities and high quality of life after graduation, with the opportunity to work part-time while studying also seen as an advantage. Meanwhile Canada was the country named by the second largest proportion of survey respondents, likely for similar reasons.

The UK was also mentioned as an attractive destination, known for its high quality of education – particularly in the business field – and its selection of top-ranking universities.

However, focus group participants saw the UK as a particularly expensive study destination, which was seen as a barrier for many students; in contrast, other countries such as Australia were described as offering better value for money.

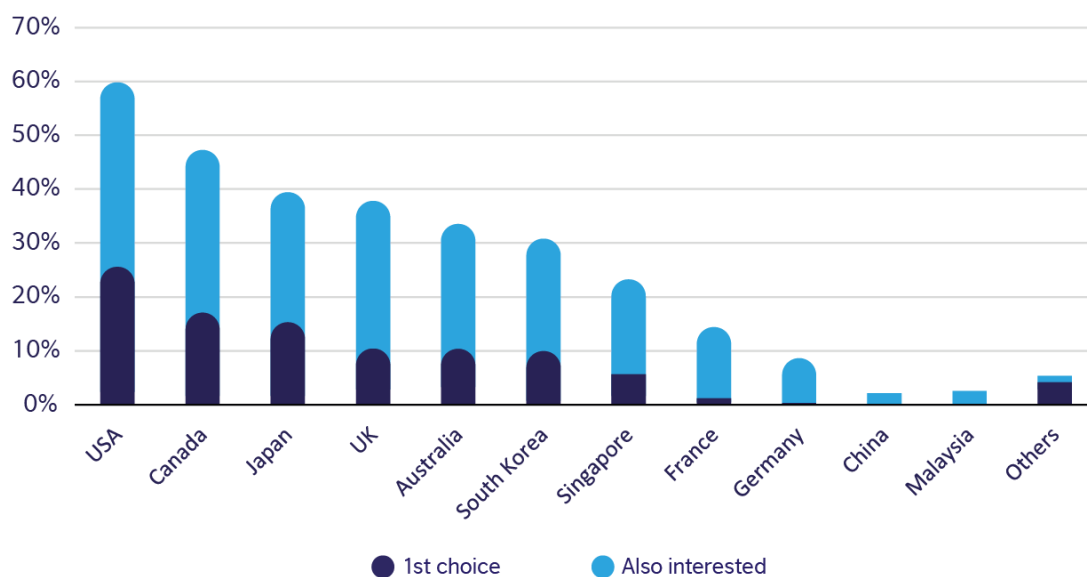
One student expressed a common attitude across the focus groups by saying that *“[The] standard of education of UK is also good, it’s one of the best. But I have this stigma that it’s expensive – not only the tuition but the lifestyle, the living, high standards of living. So that’s why that’s no longer included in my choices [...] if there’s something similar that’s acceptable, that’s what we will go after”*.

Nevertheless, the UK was the 4th most likely country to be named as a preferred study destination among student survey respondents, with 10 per cent of students who expressed an interest in overseas study choosing this as their first-choice destination and another quarter saying that they would consider the UK among their secondary choices.

Focus group discussions of overseas study showed that people who had experience in studying abroad or who were in the process of applying for overseas study the countries seen as attractive were almost entirely Anglophone destinations.

However, among the survey respondent group which, as noted above, consisted mainly of students who had not deeply investigated the different overseas study options, Japan and Korea were also common choices as first-choice study destinations for 15 and 10 per cent of respondents, respectively. Only a very small minority of respondents chose European countries, China or Malaysia among their top study choices.

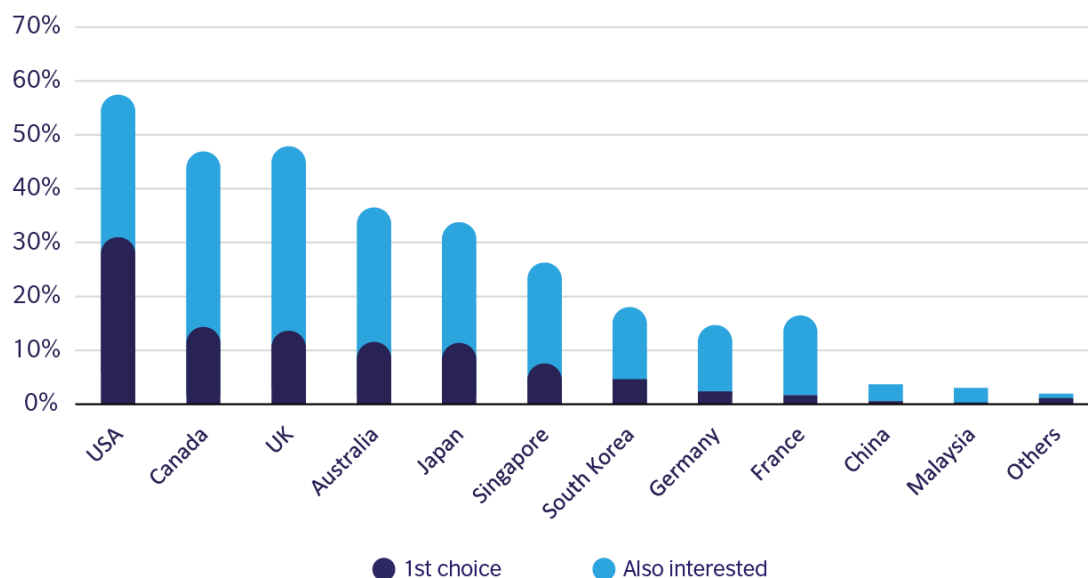
Figure 26: Students’ preferred countries for overseas study



Base: Students interested in studying overseas (250 respondents)

Parents who were interested in their child studying overseas gave broadly similar answers to the students themselves when asked about their preferred study destinations for their children. The most-preferred country was the US, followed by Canada. The parent group had an even stronger preference for Anglophone destinations, and the UK was rated as the third most preferred country, with 14 per cent of parents choosing this as their first-choice destination.

Figure 27: Parents' preferred countries for overseas study



Base: Parents interested in their children studying overseas (773 respondents)

Social media analysis of posts by people in the Philippines about studying in three key countries (the UK, US and China) shows that the student experience is the most common discussion topic in online discussions about all three countries. This topic includes

students’ overseas study experience as well as enthusiasm and anticipation about studying abroad.

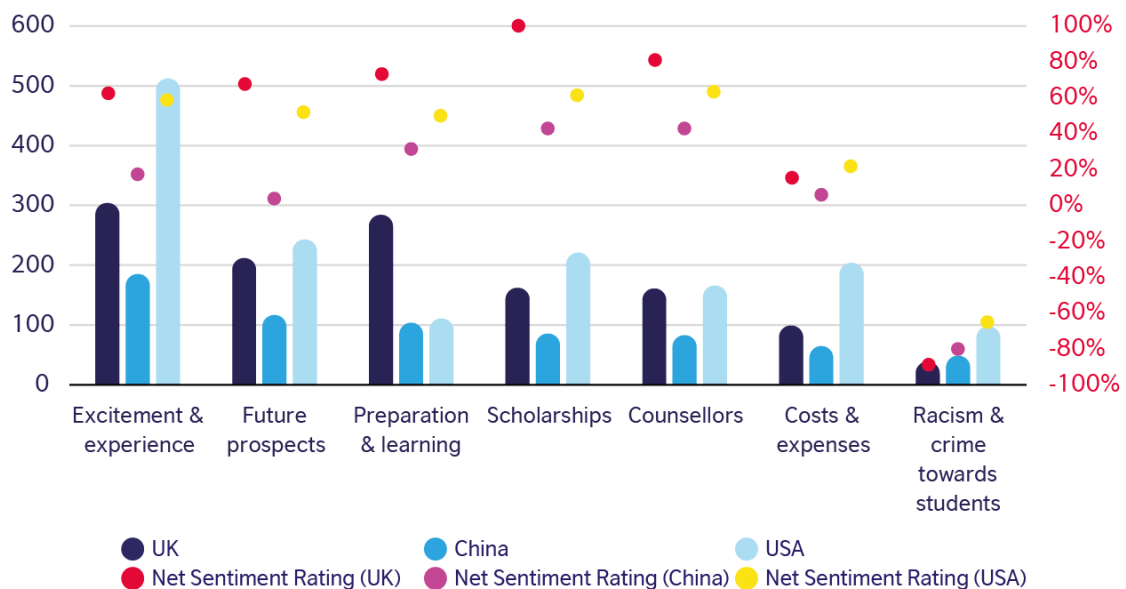
The US was the most-discussed country overall and an American education is considered a lifetime achievement for many. Anecdotes around first- and second-hand experiences are widely shared, discussing both academia and wider life in the United States. American education is considered a lifetime achievement for many.

In contrast, a larger proportion of posts on this subject related to the UK and China are specifically about academia, including getting accepted to and graduating from university, studying specific courses, and other individual experiences.

Looking specifically at posts related to the UK, the second most common topic was preparation and learning for overseas study – especially related to preparing for language tests such as IELTS. However, a larger proportion of posts relating to the other two countries were tagged as being on the theme of future prospects, often related to career opportunities after graduation.

Posts assessed as having positive sentiment greatly outnumbered those classed as negative for both the UK and the US, although in most areas – especially scholarships – the US-related posts had an even greater net sentiment ratio. Among posts discussing China the overall net sentiment ratio was 8 per cent, meaning that positive posts only outnumbered negative ones by a narrow margin.

Figure 28: Social media post volume and net sentiment ratio by aspect of overseas education



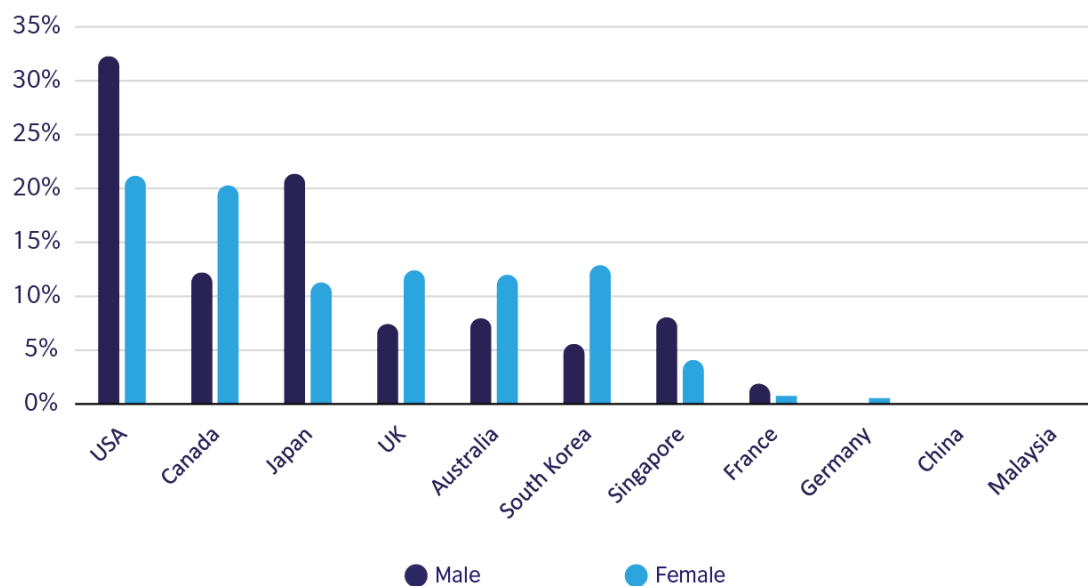
Base: Social media posts discussing the UK, US or China in terms of culture, June 2019 – March 2021

When survey results about country preferences were broken down by sex, there were noticeable differences between male and female students. The UK was relatively more popular among female students than among males, with 13 per cent of female students

that were interested in overseas study naming this country as their first-choice destination compared to 7 per cent of males.

Canada, Korea and Australia were also more popular among girls, with an especially wide margin in Korea which female students were more than twice as likely as their male counterparts to name as their most preferred destination country. Meanwhile male students were substantially more likely to say they wanted to study in the US or Japan.

Figure 29: Students' preferred countries for overseas study, by gender



Base: Students interested in studying overseas (250 respondents)

Analysis by age showed that younger students were somewhat more likely to name the UK as their preferred destination – 14 per cent of students in the 15-18 age range, compared to 11 per cent in the 18-20 age group and 9 per cent of those aged 21 or above. Meanwhile there was no clear and consistent trend by income level, with the middle-income band (monthly household incomes from PHP 40,001 to 80,000) having a lower proportion of students preferring the UK than either the lowest or highest income group. There were no statistically significant trends by region in terms of preference for UK education.

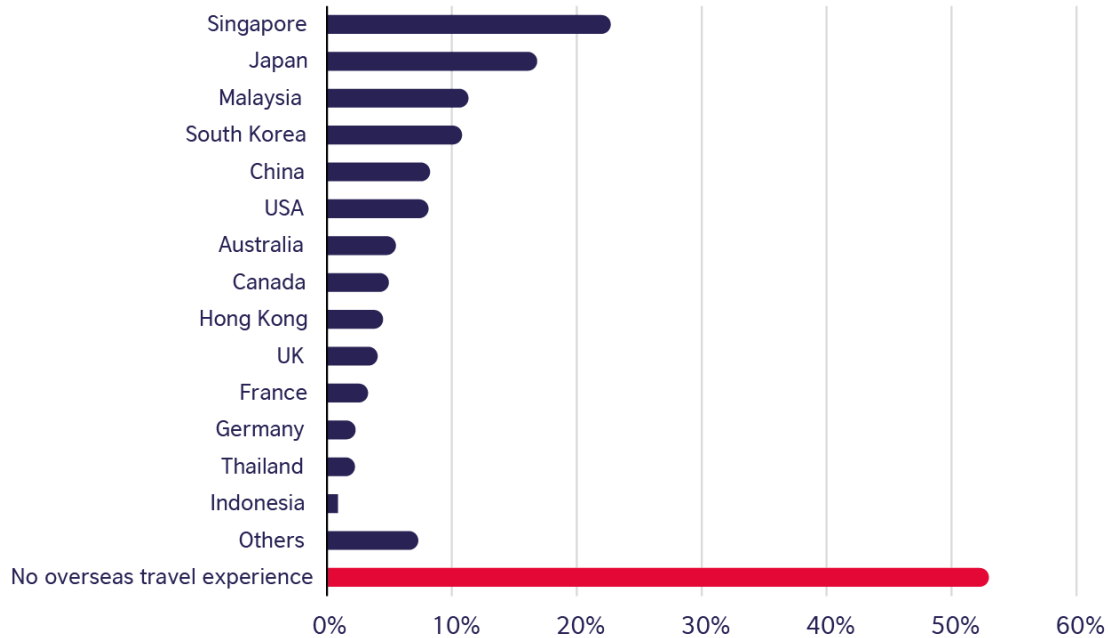
Looking at the factors that students said were most important when choosing a country, most had little effect on students' likelihood of choosing the UK – although among the relatively small group of students who said that interest in local culture played an important role in their decision there was a relatively higher level of preference for the UK.

4.2 Interest in overseas travel

Survey results showed that roughly half of survey respondents in the Philippines had travelled abroad in the past. The most common travel destination was Singapore, which had been visited by almost a quarter of respondents, followed by Japan, Malaysia and

Korea. Only a very small minority of 4 per cent said that they had previously visited the UK.

Figure 30: Previous travel experience by destination country



Base: All respondents in the Philippines (2,000 respondents)

Despite the relatively low proportion of previous overseas travel, respondents in the Philippines described themselves as keen to travel abroad in the future, including to destinations that can provide a feel of modernity, those with interesting traditional practices and places with attractive natural scenery.

Focus group participants did not see Covid-19 as posing any impact to their future travel plans over the medium to long term, as they looked forward to a quick global recovery from the effects of the virus.⁵

These focus group participants saw unique places of interest, such as heritage sites, buildings, architecture, museums and art galleries, as well as music and nightlife venues, as one of the most important factors when deciding where to travel to.

Lifestyle factors such as cuisine, traditions, ambience and language were also seen as an important reason to travel overseas and a major factor when choosing a destination. Natural scenery and climate were also described as important to their decisions, with countries with four seasons being described as attractive because of the Philippines climate’s lack of this feature.

Among survey respondents the most important single factor was safety, with almost four in five people in the Philippines naming this as a factor affecting their decisions. Aside

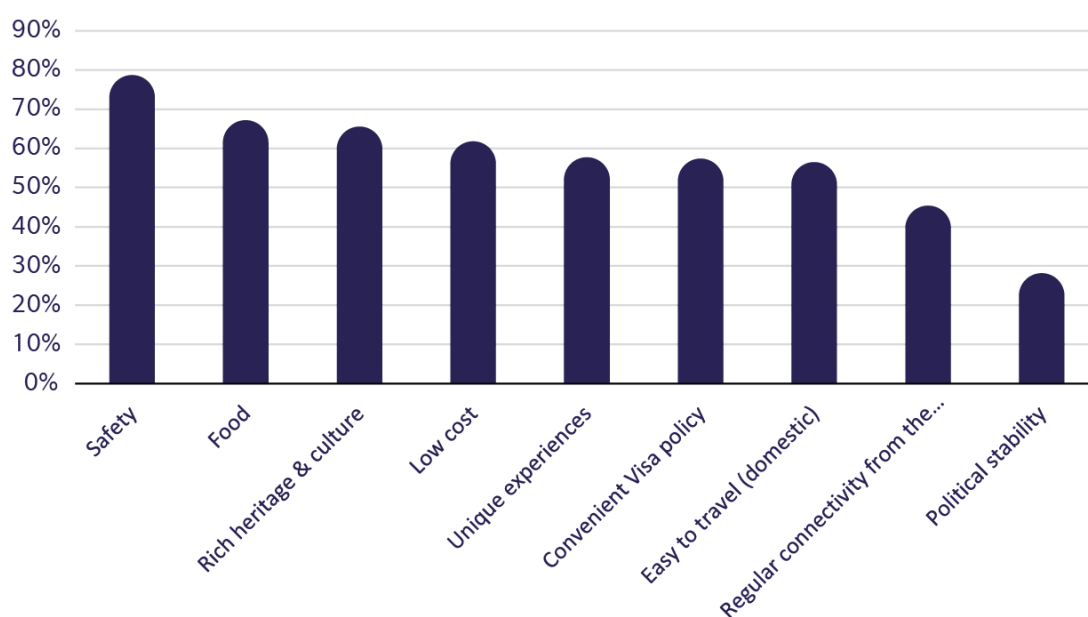
⁵ Focus groups were conducted in early 2021

from this, the two most important factors were a country's food and its heritage and culture.

Affordability of travelling to the destination and expenses while staying there was also described as important by many focus group participants and slightly less than two thirds of survey respondents.

Aside from these factors, somewhat over half of survey respondents agreed that visa policies and ease of domestic travel were important factors when deciding where to travel, while connectivity to the Philippines and political stability were seen as important by a smaller proportion of respondents.

Figure 31: Important factors when deciding whether to travel to an overseas country



Base: All respondents in the Philippines (2,000 respondents)

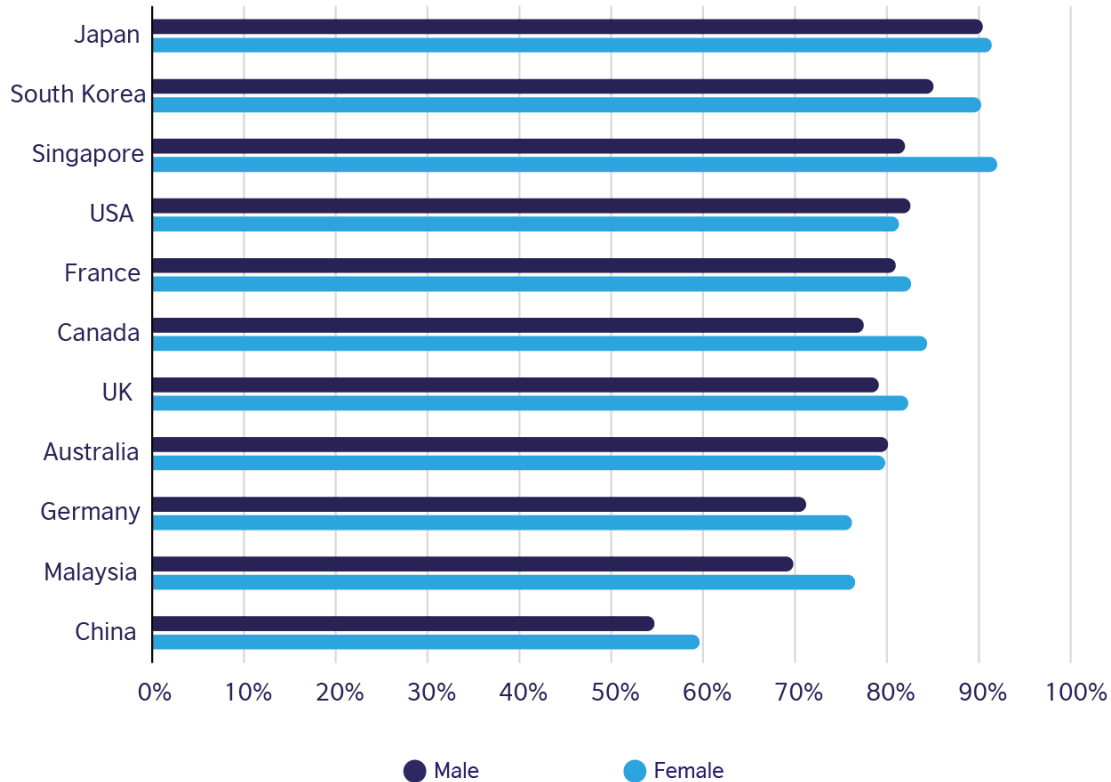
When survey respondents were asked about their attitude towards visiting specific places, people in the Philippines had positive attitudes towards visiting all 11 countries included in the survey. Even the least-preferred destination, China, had 57 per cent of respondents saying they wished to travel there, while the most-preferred destination was Japan which more than 90 per cent of people said they wanted to visit.

The UK ranked 7th overall among this list of countries, with 81 per cent of respondents saying they were interested in travelling there – a very similar proportion to other Western countries including the US, France, Canada and Australia. Aside from Japan, the second and third most preferred countries – Korea and Singapore respectively – were also in East Asia.

Female survey respondents were slightly more likely to say they wanted to visit almost all destinations, although the size of this gender gap was small. With regard to the UK, the relevant percentages were 79 per cent of male respondents and 82 per cent of

females. Singapore was the country for which male and female respondents had the largest gender gap.

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



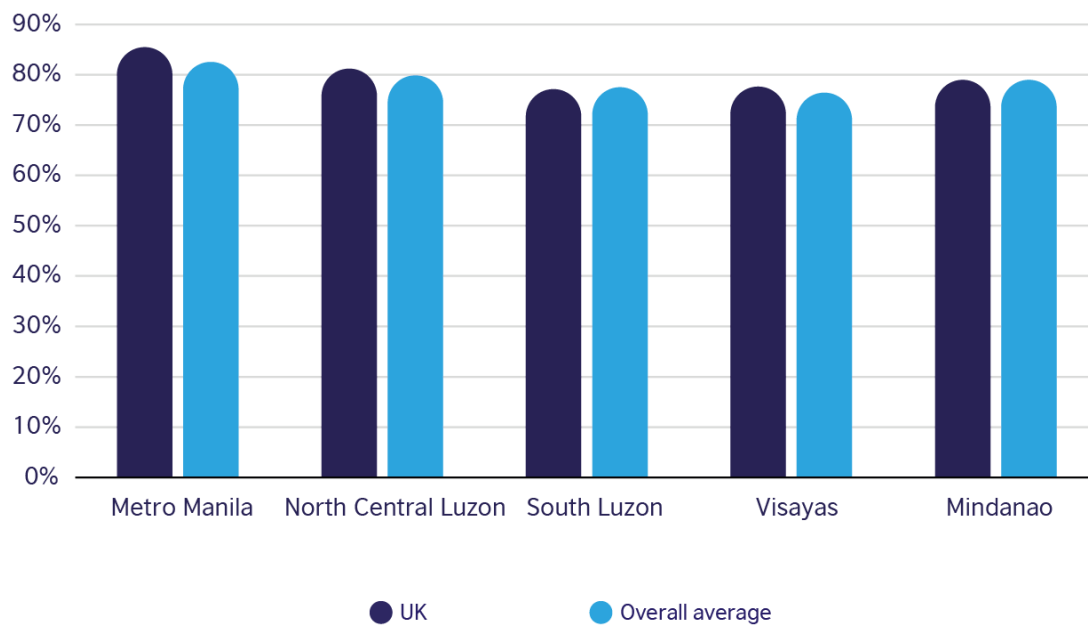
Base: All respondents in the Philippines (2,000 respondents)

There was no consistent correlation in overseas travel attitudes by survey respondents' ages when asked about the UK or across all countries included in the survey on average.

Unlike survey results in most other ASEAN countries, there was very little difference in attitudes towards overseas travel by income; in the case of the UK, the level of interest was between 80 and 82 per cent in each of the three income bands.

Survey results do show a statistically significant difference by region: 85 per cent of residents of metro Manila said they were interested in visiting the UK compared to 81 per cent in North Central Luzon, the region with the next-highest interest, and 77 per cent in Visayas which had the lowest level of interest.

Metro Manila was also the region with the highest level of interest in travelling overseas if data is averaged across all destination countries.

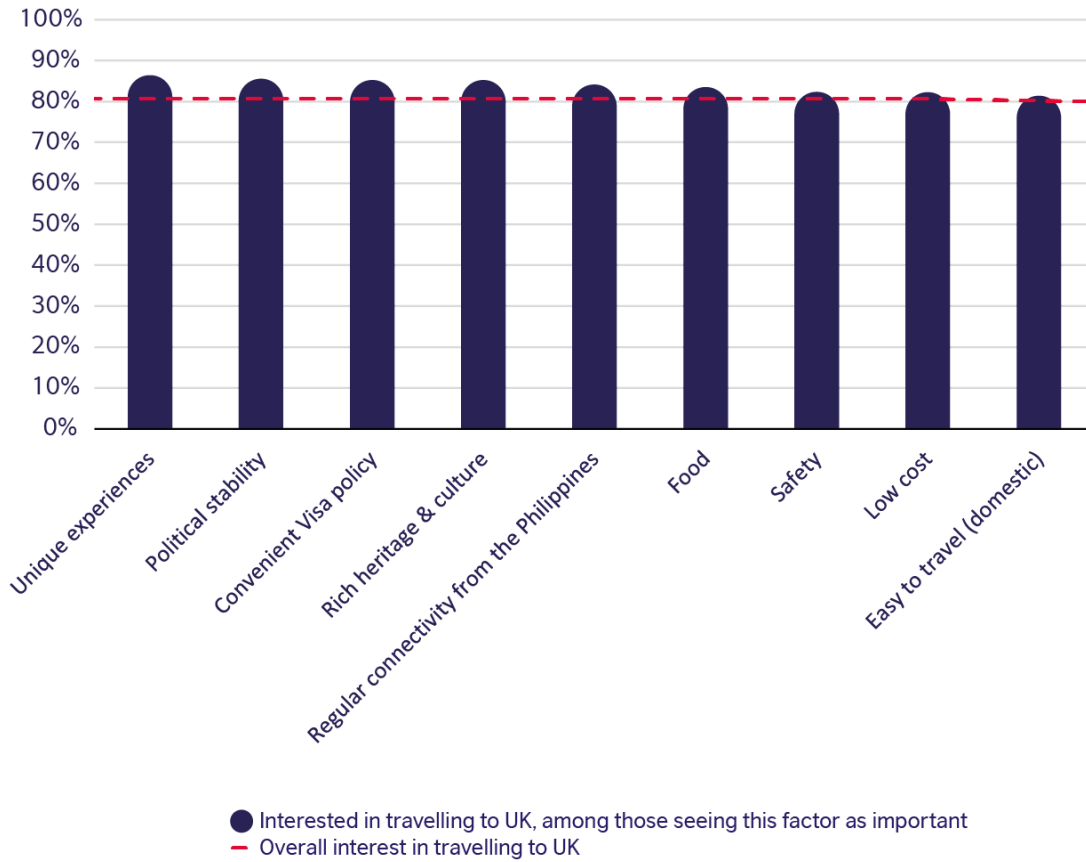
Figure 33: Interest in travelling to the UK, by region

Base: All respondents in the Philippines (2,000 respondents)

Survey results indicate that the factors identified by respondents as important when deciding to travel abroad has relatively little impact on their desire to travel to the UK. Those who named unique experiences, political stability, convenient visa policies or rich heritage and culture as important factors were slightly more likely to say they wanted to visit the UK, but differences were small overall.⁶

⁶ As in other ASEAN countries, people with a greater level of interest in overseas travel tended to name more factors as important, so those interested in any individual factor are at least slightly more likely to want to say they want to go abroad.

Figure 34: Interest in travelling to the UK, by factors seen as important when deciding whether to travel to an overseas country



Base: All respondents in the Philippines (2,000 respondents)

4.3 Interest in overseas business, work and immigration

A high proportion of survey respondents from the Philippines said that they were interested in trade or doing business with overseas countries. All countries asked about in the survey had more than half of all respondents saying that they were interested in doing business with partners in that country. Only two countries – China and Malaysia – had an agreement rate below 60 per cent.

The country that attracted the highest level of interest was Japan; 80 per cent of survey respondents in the Philippines said they wanted to do business with Japanese companies.

As with other countries, comments in focus group discussions suggest that survey responses may reflect passive interest rather than actual intention of doing business. Most participants commented that business opportunities were not directly relevant to them as they were currently not in a position to do business with overseas partners, either because they were currently still students, lacked seniority, or were employed in a position that did not involve business interaction with overseas people.

However, in contrast to focus group participants in many other parts of the ASEAN region, people in the Philippines did express interest in small side businesses as opportunities to grow their wealth, particularly among the younger age groups.

Respondents in the Philippines also had a particularly high level of interest in moving abroad compared to their counterparts elsewhere in the region.

While surveys in most other countries showed much lower interest in living overseas than in doing business with foreign companies, the gap in the Philippines was much smaller.

The majority of surveyed Filipino residents agreed that they would like to live abroad for an extended period in almost all of the target countries; 58 per cent of respondents in the Philippines said they would be interested in moving to the UK, while the only places that less than half of survey respondents said they would be interested in living were China, Malaysia and Germany.

Focus group discussions reflected this high level of interest. Most participants had family members living abroad, and barriers to following suit appeared minimal. Younger people said that they would like to live abroad if this would bring better job prospects, while parents expressed the belief their children would have a “brighter future” abroad, while also imagining being able to retire overseas themselves.

Figure 35: Interest in doing business internationally or living overseas long-term, by overseas partner country



Base: All respondents in the Philippines (2,000 respondents)

Male survey respondents were generally more likely to take an interest in overseas trade, with an average gap of 5 percentage points if data from all countries is averaged together. In the case of the UK, 70 per cent of male survey respondents said that they were at least somewhat interested in doing business with British people compared to 64

per cent of females. In contrast, interest in living abroad long-term was more balanced in terms of gender.

Focus group discussions showed that people in the Philippines saw an overseas country's overall level of economic development as the most important factor affecting their interest in business cooperation, including higher spending power, a business scene welcoming foreign investments, and proper infrastructure supported by the government. These factors were seen as leading directly to stronger profit potential when selling products overseas.

Survey respondents saw ease of doing business and a cooperative government or regulatory environment as the most important factors. Clear regulations and ease of compliance and a reasonable cost of doing business were also described as important.

Some participants said that they did not think in terms of actively deciding to do business with a specific country. One focus group participant commented that *"It is hard for us to choose our clients, it is really the business that dictates it so whoever the clients we get from a different country, we cater to them, adapt to them"*.

Focus group participants in the Philippines did not have any strong perceptions or specific interest in doing business with UK companies, but said they would be willing to explore any opportunities that presented themselves.

When talking about desire to live abroad, focus group participants named a variety of factors, but the most-mentioned issue was safety and stability – including a stable economy as well as a lack of racism and discrimination. Cost of living and quality of life were also mentioned, while career opportunities – and especially opportunities for foreigners – were particularly important among younger age groups who were looking to earn higher incomes and build their career and future overseas.

Family and friends abroad were also mentioned as an important advantage, which led to a lower level of interest in the UK as participants were less likely to have relatives in this country. The UK was also seen as having a high cost of living and a lifestyle which may not be suitable for people from the Philippines, including unattractive cuisine, poor weather and people who were seen as less warm or friendly.

Compared to other countries, a higher proportion of respondents in the Philippines named cultural attraction as important to their decisions. However, a country's heritage and culture were still the least likely of the listed options to be described as playing an important role in decisions, with only 36 per cent of respondents describing this as important to business cooperation and 43 per cent saying it would be important when choosing where or whether to live abroad.

4.4 The link between cultural interest and overseas interaction

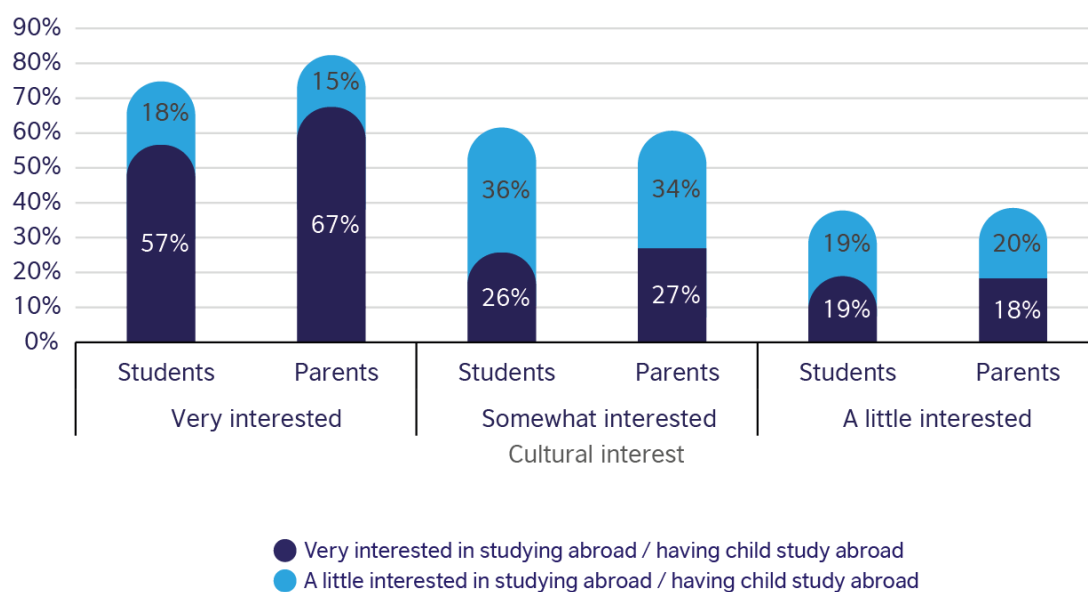
In the Philippines, as in other countries investigated in this series of reports, there is a strong connection between respondents' interest in overseas culture and their attitudes towards interaction with that country.

A comparison of students' answers to two questions demonstrates a direct relationship between their level of interest in overseas culture and their interest in studying abroad. For example, 57 per cent of those who described themselves as "very interested" in overseas culture said that they were also very interested in studying abroad; the corresponding proportion was 29 per cent among those who said they were "somewhat interested" in overseas culture and just 3 per cent among those who said they were only "a little interested".

A similar pattern applies among parents, although to a lesser extent. The group "very interested" in overseas culture also had the highest level of interest in sending their children to study abroad. Decreasing interest in culture was associated with a similar decline in attitudes towards overseas study.

Parents who described themselves as "a little interested" in overseas culture were only a third as likely to say they were "very interested" in sending their child to study abroad, or roughly half as likely to say that they were at least a little interested in this option.

Figure 36: Students' and parents' interest in studying abroad, by level of interest in overseas culture⁷



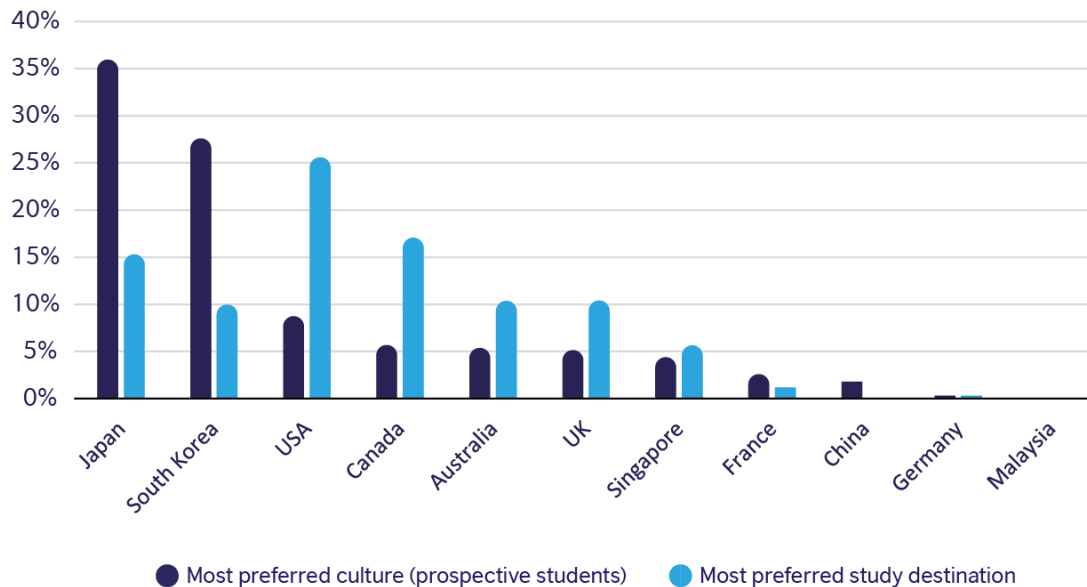
Base: Students (379 respondents) and parents (1,087 respondents)

Focus group discussions showed that culture is seen as a secondary factor when it comes to interest in overseas study. Adapting to the local culture was seen as important when considering studying abroad, as students will need to live abroad for a year or more to complete their course, but this was seen as a less important factor than the quality of educational institutions, the programmes they offer, the cost of studying and living abroad, and the opportunities that an overseas education can provide.

⁷ Data for students and parents describing themselves as "not very interested" or "not at all interested" in overseas study is not provided due to the small number of respondents choosing these options.

When comparing the countries that students said were most attractive in cultural terms and those that they named as their preferred overseas study destinations, some countries perform much more strongly on one question than the other. While Japan was the clear favourite in terms of cultural preference, the country was ranked only third as a place to study, while Anglophone countries were seen as much more attractive for education than they were in terms of culture.

Figure 37: Students' preferred overseas culture and preferred study destination



Base: Students interested in studying overseas (250 respondents)

Outside of education, discussions of the importance of culture in overseas business cooperation generally reflected an attitude that culture is not a major factor influencing these decisions. Some people did say that understanding local people could help to make the process of business transactions smoother or that it is important to cater to customers' preferences; however, cultural interest was not described as an important factor in this area.

Survey results showed that a country's cultural heritage was the least likely of 8 factors to be named as important by respondents in the Philippines when asked about doing business with overseas partners, although the 36 per cent who agreed with this statement was in a higher proportion than any other ASEAN country.

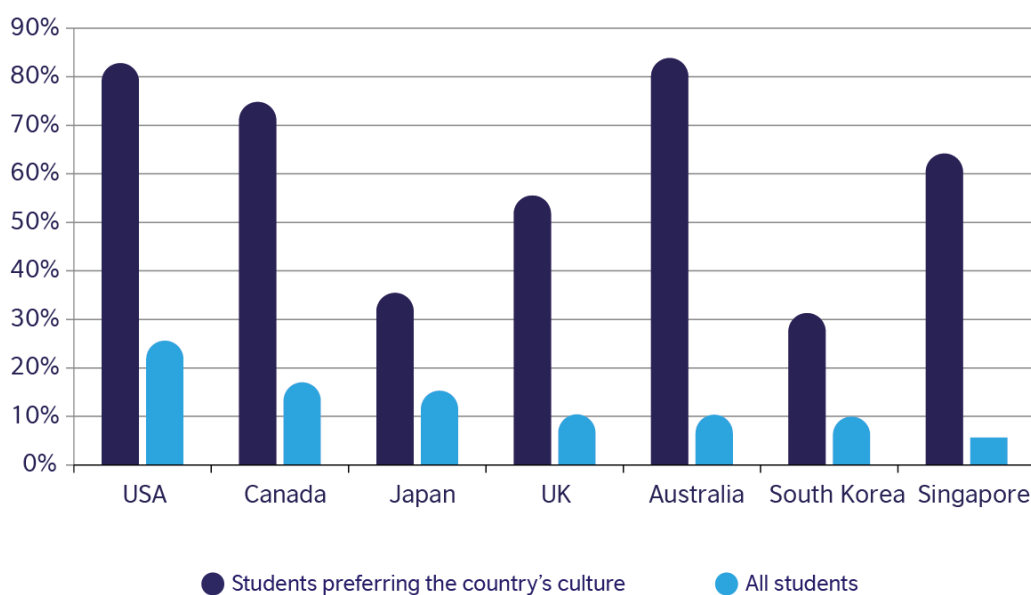
When asked about tourism, aspects of overseas culture were seen as more important. Specifically, heritage sites, museums or art galleries were listed as the most important factor when deciding where and whether to travel abroad, while other culturally-related issues such as lifestyle, cuisine and local traditions were also mentioned.

One participant said that the US is "*the superpower that we can't escape*" and that "*everything is Americanised*", but then commented that "*a lot of what I like are from there [...] so it would be nice to travel there*". Even outside of specific cultural activities, participants commented that "*the ambience, how locals live*" is something they can feel when travelling. These focus group comments were supported by survey results, where

two thirds of respondents in the Philippines saw heritage and culture as among the most important factors to visit a country for tourist purposes, making this the third most important factor overall behind safety and food.

As noted above, most prospective overseas students described other factors as more important than cultural interest when choosing a country to study in. However, survey results show that cultural interest may have a greater impact on study choices than these comments might suggest. For any given country, students who preferred this country in cultural terms were far more likely to describe it as their preferred study destination than those who had less interest in this country's culture.

Figure 38: Students' preferred study destination, overall and for students preferring this country's culture⁸



Base: Students interested in studying overseas (250 respondents)

Among students who said they preferred UK culture and were interested in studying abroad, more than half named this country as their preferred study destination compared to just 10 per cent of all students considering overseas study.

Similarly, the proportion of students who preferred US culture who said they would also prefer to study in this country was 83 per cent, more than three times the proportion among all prospective overseas students. Even Japan and Korea, which were both substantially less popular as study destinations compared to their popularity in cultural terms, were both seen as much more attractive study destinations by students that preferred their culture compared to those that found other countries more attractive.

If study destinations beyond the first choice are also included, a similar trend applies; as with first-choice preferences, students who prefer a country's culture are substantially more likely to say that they are considering studying in that country. For example, 85 per cent of the survey respondents that preferred UK culture and who also expressed

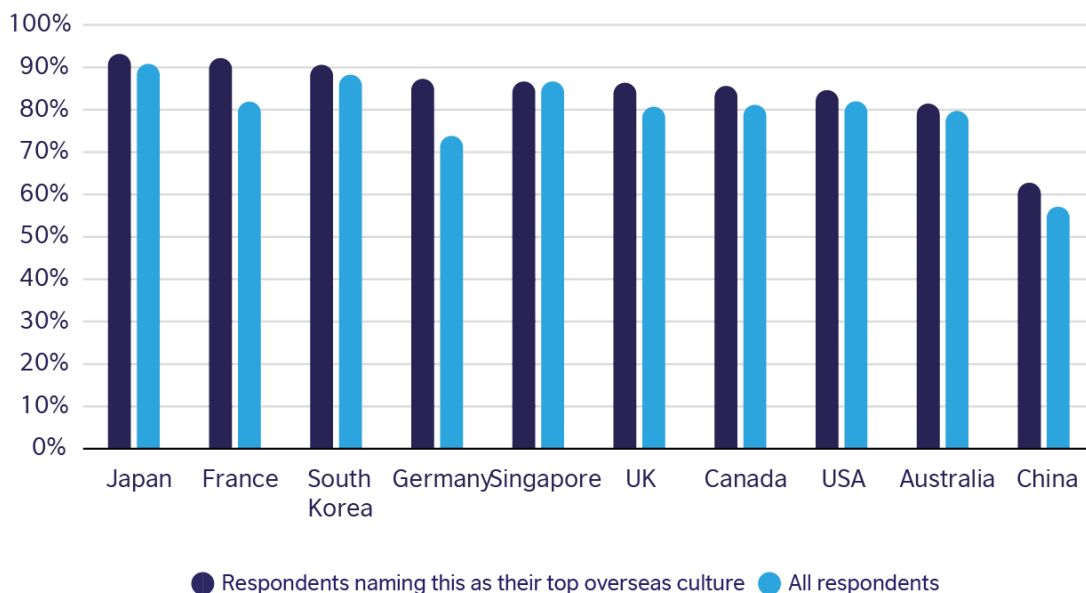
⁸ Data for France, Germany, China and Malaysia is not shown as only a small number of prospective overseas students described these countries as their preferred overseas countries in terms of culture

interest in overseas study named the UK as a country they were considering as a study destination, compared to 37 per cent of the overall survey sample.

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, students naming a given country as their cultural preference were much more likely to name that country as their first-choice study destination.

The effect on interest in travelling to a particular country as a tourist is slightly smaller, due to the high overall likelihood of travelling to any given country. However, people that prefer a country’s culture are still on average 5 per cent more likely to want to travel to that country compared to the overall survey population. In the case of the UK, 86 per cent of respondents who preferred UK culture said they were interested in travelling to the country compared with 81 per cent of all survey respondents.

Figure 39: Interest in travelling to selected countries, overall and for people preferring this country’s culture⁹

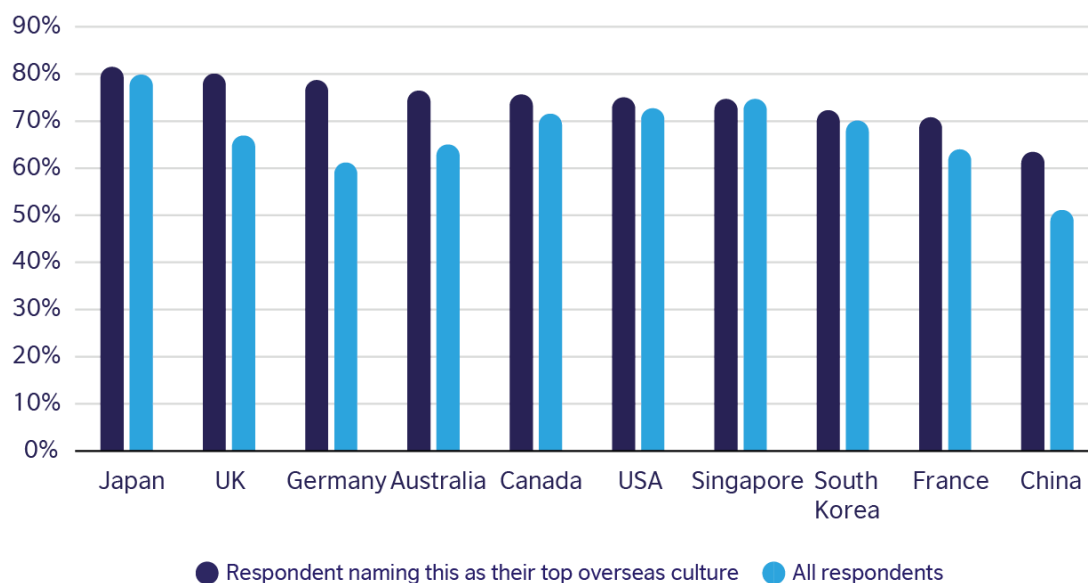


Base: All respondents in the Philippines (2,000 respondents)

Survey respondents who preferred a country’s culture were also slightly more likely to say they were interested in doing business with partners in that country, with an average 7 per cent difference across all countries compared to survey respondents as a whole. This gap was somewhat larger for the UK, with 80 per cent of people who preferred UK culture saying that they were interested in business cooperation compared to 67 per cent of all survey respondents.

⁹ Data for Malaysia is not included in the chart due to the low number of respondents naming this country as their most-preferred culture

Figure 40: Interest in doing business with partners in selected countries, overall and for people preferring this country's culture¹⁰



Base: All respondents in the Philippines (2,000 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, 79 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 58 per cent of the overall sample.¹¹

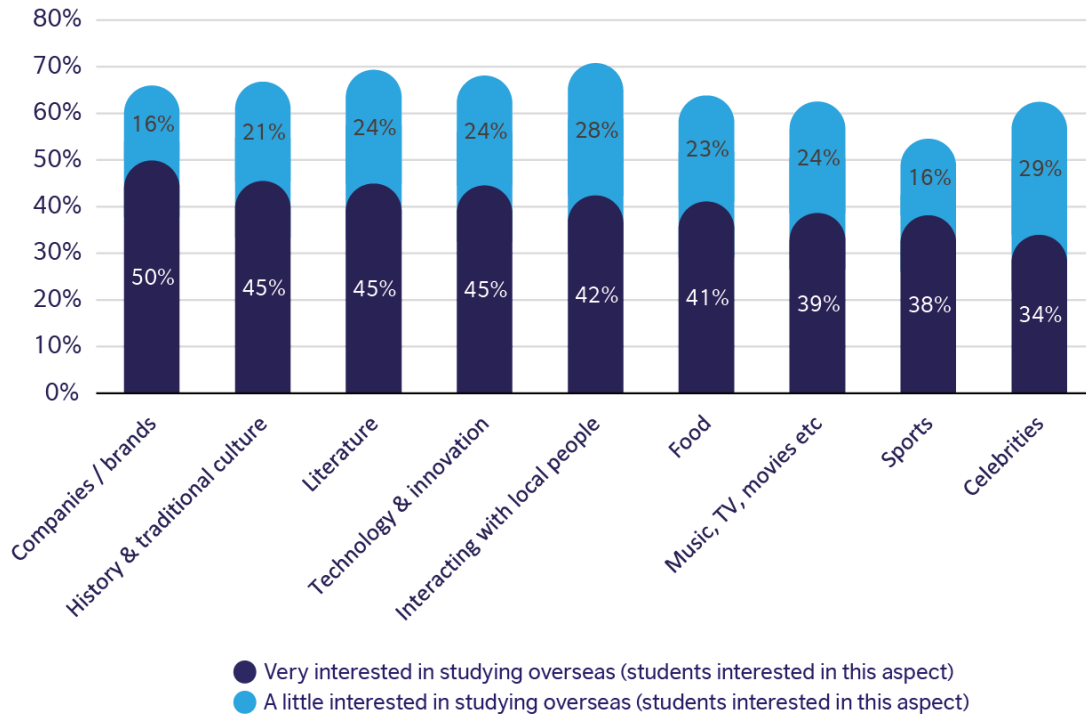
Interest in different aspects of overseas culture also affects the level of interest in overseas interaction. Looking first at education, the proportion of students who said they were very interested in studying abroad varied from 34 to 50 per cent depending on the aspects of overseas culture they said they found most interesting.

The group of students who were most likely to say they were very interested in studying abroad were those who named companies and brands among their top overseas cultural interests, followed by those interested in history & traditional culture, literature and technology. Meanwhile students who named celebrities, sports or popular culture among their top overseas cultural interests were the least likely to express a strong interest in studying abroad.

¹⁰ Data for Malaysia is not included in the chart due to the low number of respondents naming this country as their most-preferred culture

¹¹ 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 41: Students’ interest in studying overseas, by interested aspects of overseas culture



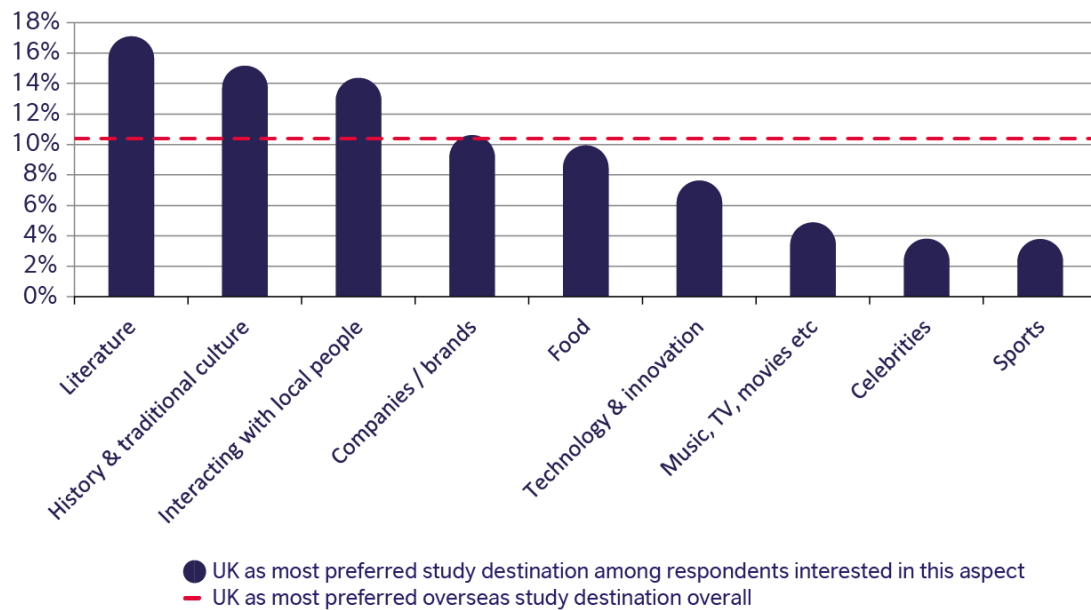
Base: Students (379 respondents)

Beyond students’ overall choice of preferred overseas culture, attitudes towards specific aspects of overseas culture also had an impact on study destination preferences.

The groups with the strongest preference for the UK were those interested in literature, history and traditional culture or interacting with local people, while the country was less likely to be chosen as the top destination by those who named sports, celebrities or popular media among their top interests.

In the case of literature this interest could be connected to perceptions of the UK as being strong in this field; however, perceptions of the UK as strong in the area of sports do not appear to be linked to a similar advantage among this group.

Figure 42: Students' preference for the UK as a study destination, by interested aspects of overseas culture

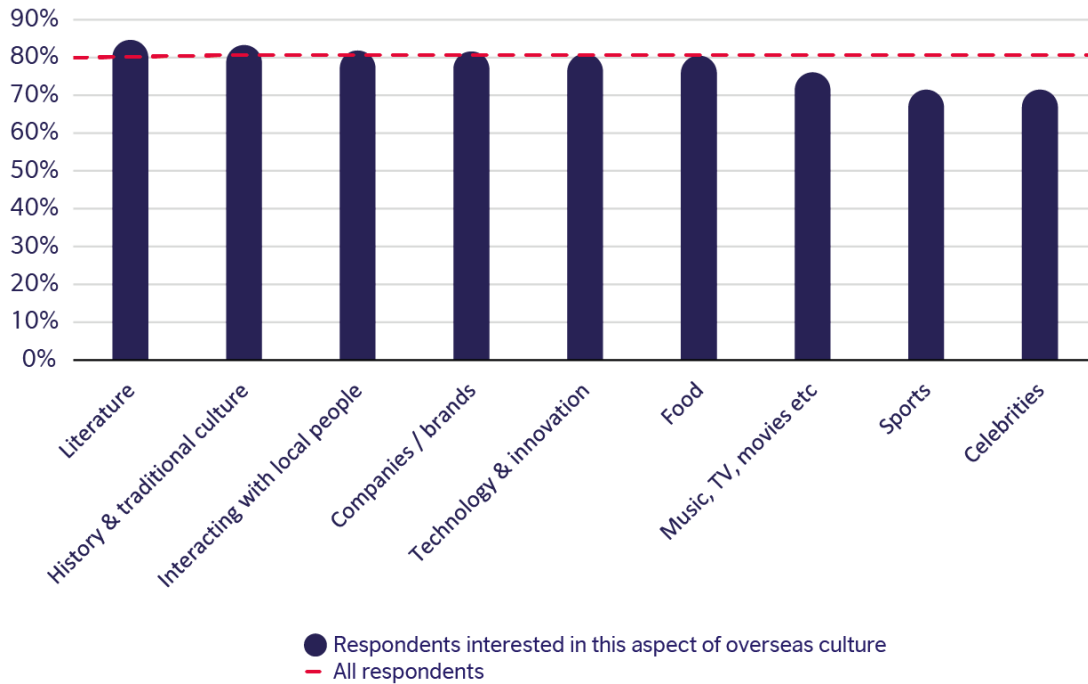


Base: Students interested in studying overseas (250 respondents)

While the US is the most popular destination country among all groups, it was particularly popular among students interested in celebrities and technology, while being less popular than average (although still more popular than any other study destination) among those who named interacting with local people among their top interests, being only slightly more popular than Japan or Canada.

There is also a strong connection between physical visits and interest in studying in a country. While the number of survey respondents who had visited the UK was not large enough to draw any conclusions, prospective overseas students who had visited Japan were more than twice as likely to name this as their top overseas study destination compared to prospective overseas students as a whole, while those who had visited Korea or Singapore were roughly half again as likely to say that these were their first-choice study destinations compared to the overall study sample.

Figure 43: Interest in travelling to the UK, by interested aspects of overseas culture

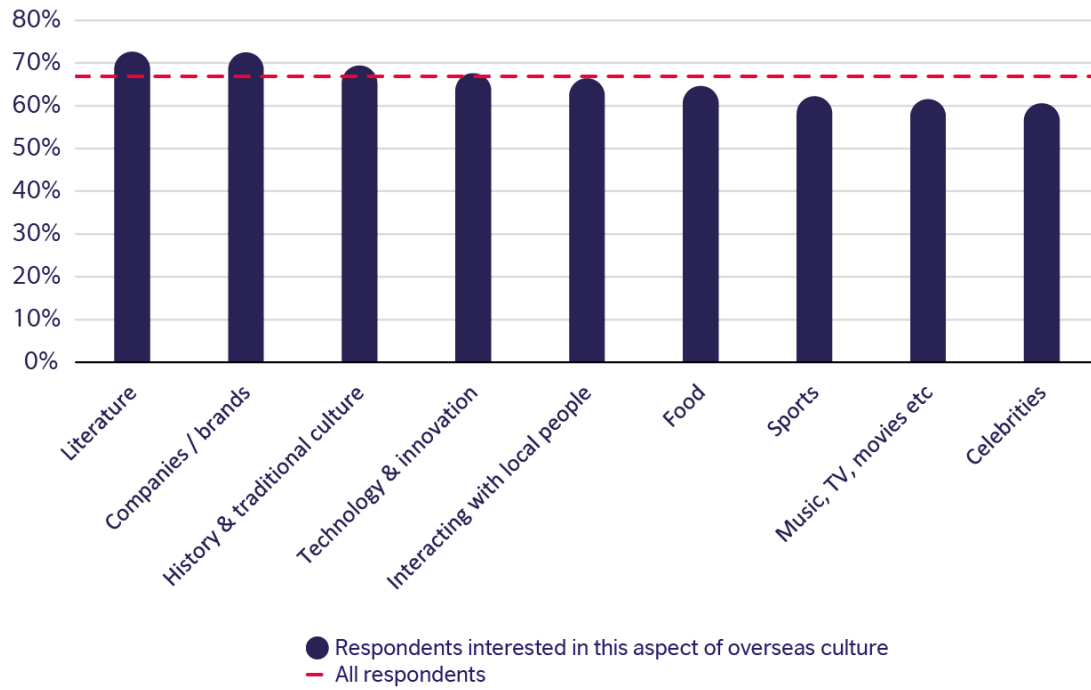


Base: All respondents in the Philippines (2,000 respondents)

Finally, interest in doing business with partners in the UK was also influenced by the aspects of overseas culture that survey respondents found attractive.

Respondents who named companies and brands as their top overseas cultural interest were more likely to say they wanted to do business with UK partners. People interested in overseas celebrities were again the group least likely to want to do business with UK partners, along with those who named media and sports among their top overseas cultural interests.

Figure 44: Interest in doing business with partners in the UK, by interested aspects of overseas culture



Base: All respondents in the Philippines (2,000 respondents)

5. CONCLUSIONS

This report has shown that, while people in the Philippines report a very high level of interest in overseas culture, the UK is not seen as one of the most attractive countries in terms of culture.

Though 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. In contrast Japan and Korea are by far the leaders in terms of cultural interest, while the UK also falls behind the US and Canada.

Similarly, social media analysis and focus group discussions suggest that most people in the Philippines do not find the UK especially attractive in cultural terms, although awareness of UK media such as TV shows was wider in the Philippines than in most other ASEAN countries.

As with other ASEAN countries, research in the Philippines showed that the UK was seen as much more attractive in the field of education than in terms of overall cultural interest. This was particularly true among people actively engaged in applying for overseas higher education courses or who have studied abroad in the past, who described the UK as attractive due to its high quality of education – particularly in the business field – and its selection of top-ranking universities. However, the UK was also seen as an expensive study destination, which was regarded as a barrier for many students, and the US was more prominent when people discussed the top study destinations.

In the general student population, the UK was also seen as being less attractive than the US but still performed better than it did in terms of overall cultural interest. More broadly, survey respondents had a strong interest in overseas study, with around two thirds of students saying that they are at least a little interested in overseas study.

As with their counterparts in other ASEAN countries, most people in the Philippines did not describe cultural interest as being among the most important factors when it comes to their decision to study overseas, their choice of study destination or their attitude towards overseas business.

However, indirect evidence from survey results showed that attitudes towards overseas countries' culture could have a stronger effect than these answers may suggest. Both in the Philippines and elsewhere in the ASEAN region there were strong connections between survey respondents' answers when asked about their interest in different countries' culture and their attitudes towards studying in, travelling to, doing business with, or working in those countries.

In the field of education, surveyed students in the Philippines who described themselves as "very interested" in overseas culture were more than twice as likely to also say that they were very interested in studying abroad compared to those describing themselves as "somewhat interested", and had an even bigger gap compared to those expressing a lower level of interest in overseas culture.

At the same time, among students expressing an interest in studying abroad, those who named the UK as their favourite overseas country in cultural terms were also around five times as likely to name this country as their preferred study destination. People who preferred UK culture were also more likely to want to do business with the UK, to want to visit the country as a tourist, or to say they want to live and work in the country for an extended period.

Readers should be aware that survey responses discussed in this report only reflect the initial stage of potential students' decision process. The true proportion of HE students from the Philippines that go abroad for further study is far lower than the share of survey respondents who describe themselves as interested – or even “very interested” – in studying overseas. 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. Survey results also likely overestimate the proportion of people from the Philippines who would realistically be likely to interact with the UK in other ways such as trade or business with UK partners or travelling to the country for leisure.

However, this report shows that cultural interest does have an important effect on whether people start to consider engaging with overseas countries in ways like studying, doing business or travelling, while an interest in UK culture is strongly linked to an initial preference for the UK as a study destination, business partner or travel destination. This suggests that changes in attitudes towards UK culture could lead to an increase in the number of students coming to the UK as well as more potential business opportunities for UK companies.