



Measuring the cultural dividend

How does interest in overseas culture
affect Singaporean study decisions?

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ABOUT EDUCATION FUTURES

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

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1. EXECUTIVE SUMMARY

- This report analyses the link between Singaporean people's interest in overseas culture and their desire to interact with overseas countries for study abroad, tourism or business. It is based on a combination of focus groups and large-scale surveys carried out in early 2021 as well as analysis of user-generated posts on social media. The report forms part of a series analysing attitudes in six different ASEAN countries.
- Singaporean people have a relatively high level of interest in overseas culture. Overall, 86 per cent of people described themselves as "very interested" or "somewhat interested" in overseas culture, ranking 2nd among the six target countries. The aspects of overseas culture that Singaporeans are most likely to be interested in included food, history and traditional culture, interaction with local people, and technology and innovation.
- Characteristics affecting Singaporeans' interest in overseas culture included wealth and student status, with wealthier Singaporeans and students both being more likely to describe overseas culture as attractive. There was little consistent difference in Singaporeans' interest in overseas culture as a whole by age or gender, although the aspects of overseas culture people see as interesting varies based on these characteristics. COVID-19 does not appear to have negatively affected Singaporeans' interest in overseas culture, with survey respondents reporting an overall net increase in their level of interest over the previous 12 months.
- Although interest in overseas countries as a whole is high, interest in the UK specifically is much lower. Only 6 per cent of survey respondents named the UK as their preferred overseas country in terms of culture, ranking 6th overall among 10 countries and far behind the leader Japan.
- Many Singaporeans' impressions of the UK revolve around the country's history and perceptions of British people as well-mannered and polite, while the country's higher education system is also well regarded. However they do not see the country as having particular strengths in terms of technology and innovation, and generally associate English-language entertainment media with the US rather than the UK.
- Singaporeans 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 including over a third who describe themselves as "very interested". These proportions were even higher among students from higher-income families as well as among parents. However, it should be noted that the proportion of Singaporeans actually going abroad is substantially lower than this as the initial interest measured by the survey is only the first stage of overseas study consideration - most of these potential students are likely to change their mind after considering practical factors like costs and the amount of time spent abroad.

- The UK performs much more strongly in terms of overseas study intention than overall cultural interest - the UK was the most likely country to be named as Singaporean students' first-choice destination for overseas study, with focus group participants mentioning the country's top-ranked world universities, long history in international education and historical connections to Singapore. The UK was also responsible for the highest volume of Singaporeans' posts about overseas education on social media
- 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 almost three times as likely to name the UK as their first-choice destination compared to the overall group of potential overseas students.
- Singaporeans expressed strong interest in travelling abroad once the pandemic subsides, saying that Covid-19 has not dampened their interest in overseas travel in the long run. A large majority described themselves as potentially interested in visiting the UK, and among those that said they preferred UK culture the proportion is even higher. While the effect of cultural interest on doing business with overseas countries was relatively small, cultural preferences have a much larger effect on Singaporeans' attitudes towards living and working overseas for a longer period.
- Despite the UK's strong share of Singaporean outbound students, the country's relatively weak position in terms of cultural preferences is likely affecting demand for UK study. While most Singaporeans do not consciously see culture as having a large effect on their overseas study decisions, the results of this research show that it does have a significant effect on their initial country preferences, which in turn can affect students' information search process and the extent to which they look into overseas study at all. Cultural preferences also have a small but significant effect on interest in doing business with the UK, meaning that an improvement in attitudes towards UK culture could lead to more business opportunities in the future.

2. INTRODUCTION AND METHODOLOGY

Students often say that a country's culture is important when deciding where to study. But what exactly does this mean?

When overseas students are asked about their intentions to study abroad and the process of choosing a country to study in, they often name cultural interest in the destination as one of their most important decision factors. Cultural interest is also often described as important for other forms of interaction with overseas countries such as tourism or business cooperation. In 2017 a British Council report, *Measuring the cultural dividend: How does interest in UK culture affect Chinese study decisions?*, found that interest in overseas culture was a strong predictor of Chinese students' interest in going abroad for further study, while interest in a particular country was an important driver of students' initial overseas study preferences.

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

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

The research in the current study draws on 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 Singaporean students planning to study abroad, returned alumni, parents and young people, conducted in early 2021.
- Previously published research and studies of opinion and attitudes to overseas culture and international study, including previous British Council reports as well as third-party research.

Analysis of social media posts was based on posts made in the period from June 2019 to March 2021. Relevant posts were identified based on natural language mining tools with human quality assurance, and customised tools were used to analyse buzz volume,

content and sentiment. The analysis covered a total of 57,397 posts – the majority of which were on Twitter – that mentioned the UK, US or China in the context of culture, education, work & immigration or personal wellbeing.

Quantitative surveys were distributed in the first quarter of 2021 through an online platform. Users were targeted based on a representative sample of Singaporeans, taking into account factors such as gender, age and ethnic group. A total of 1,400 responses were received in Singapore, as part of a total of 13,200 responses across all six target ASEAN countries.

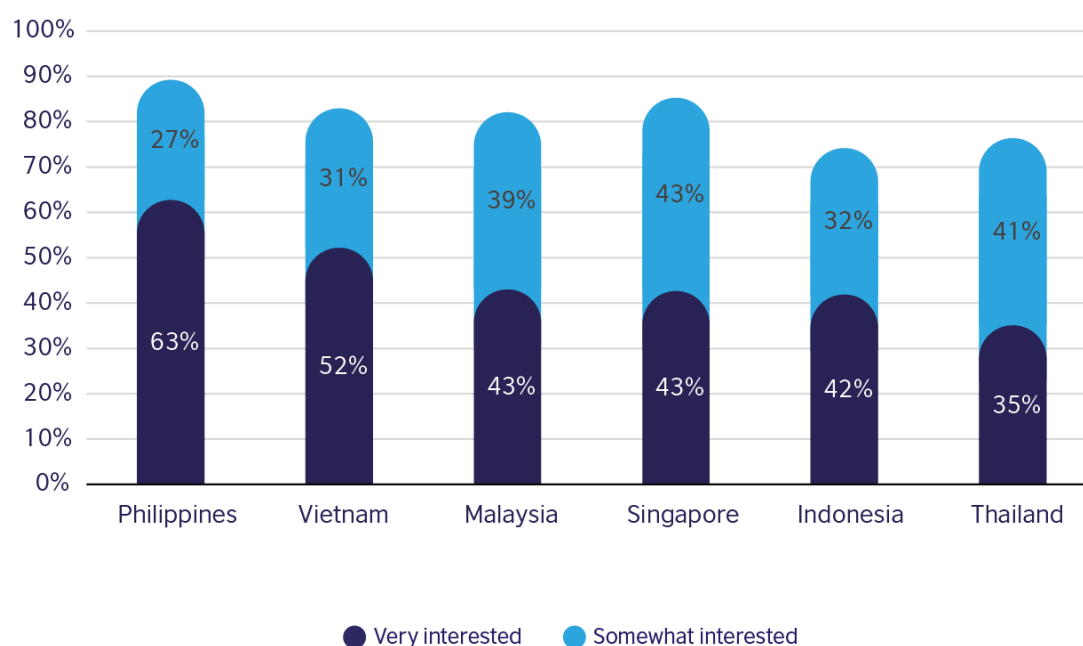
Four separate focus groups were conducted with Singaporeans in late January 2021. Given the pandemic situation this research was conducted online.

3. INTEREST IN OVERSEAS CULTURE

3.1 Level of interest in overseas culture

Overall, a large majority of Singaporeans described themselves as interested in overseas culture and interacting with overseas countries. Survey results found that 43 per cent of Singaporean respondents described themselves as “very interested” when they were asked a broad question about their level of interest in overseas culture, while 86 per cent described themselves as at least “somewhat interested” – higher than four of the five other countries covered by this series of reports.

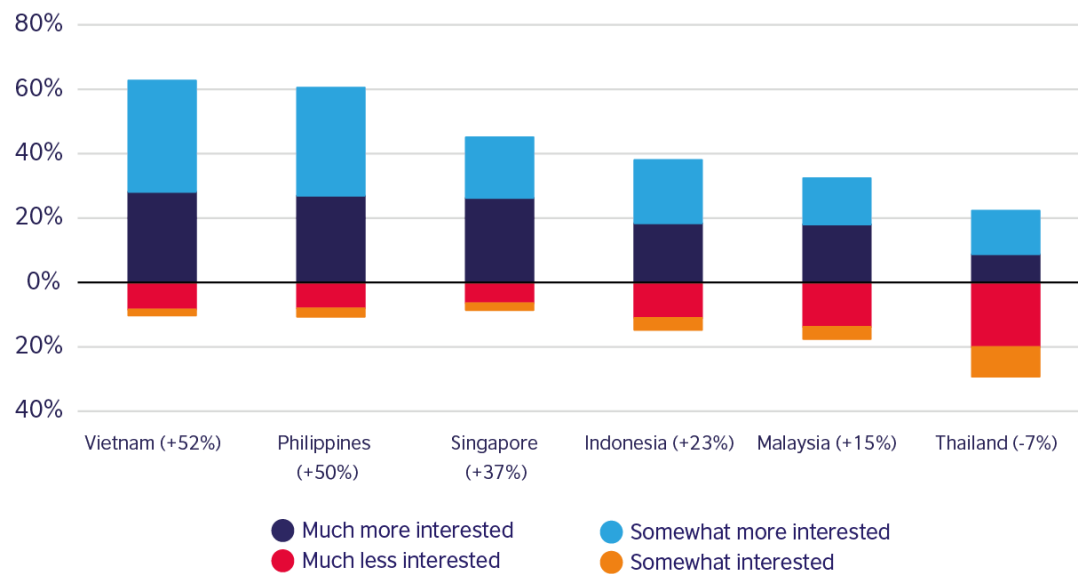
Figure 1: Interest in overseas culture, Singapore vs other ASEAN countries



Base: All respondents (1,400 respondents in Singapore / 13,200 respondents total)

The surveys – carried out in early 2021 – also asked about the change in respondents’ attitudes towards overseas culture compared to 12 months earlier. Despite this period covering the start of the Covid-19 pandemic, results were very positive – 45 per cent of respondents said that they had become much more interested or somewhat more interested in overseas culture over the last year, around five times as many as those who said the opposite. Overall, the net result for Singapore was +37 per cent, defined as the proportion of respondents who expressed a positive change minus those who gave a negative response.

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



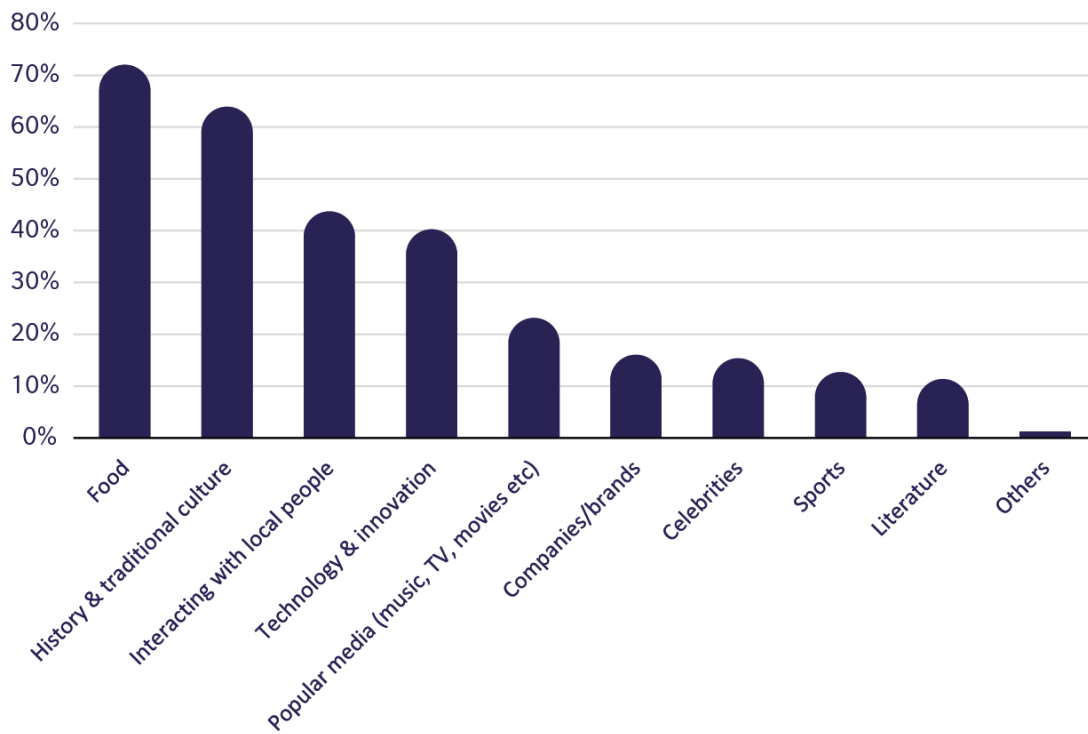
Base: All respondents (1,400 respondents in Singapore / 13,200 respondents total)

Focus group discussions with Singaporeans – including groups of parents, of prospective overseas students, of returned overseas alumni and of young people – show that culture is associated with the unique aspects of overseas countries, including lifestyles and behaviour, values and mindset, and history and heritage. Other factors they mentioned included languages, food, religion, architecture, education, and government and society. As with groups in several other ASEAN countries, Japan was the most-mentioned country when it comes to perceptions of culture, being at the top of many Singaporeans' minds for both the traditional and modern aspects of its culture as well as the nature of its people.

When asked about the aspects of overseas culture they found most interesting, Singaporeans – as with their counterparts elsewhere in ASEAN – were most likely to mention food. More than 70 per cent of survey respondents named this among the top three aspects of overseas culture that they were interested in, followed by history and traditional culture which was chosen by 64 per cent of respondents. Interaction with local people and technology & innovation were also relatively popular, with a major gap between these and other aspects of overseas culture which attracted comparatively less attention.

The least popular of the nine areas listed in the survey was literature, which only 11 per cent of Singaporeans listed in their top three cultural aspects. Some aspects, such as history & traditional culture, interaction with local people and literature, were relatively more popular among respondents that described themselves as interested in overseas culture, while others, including food, media (music, film and TV) and technology and sports were more likely to be named as top-3 aspects among people who said they were less interested in overseas culture.

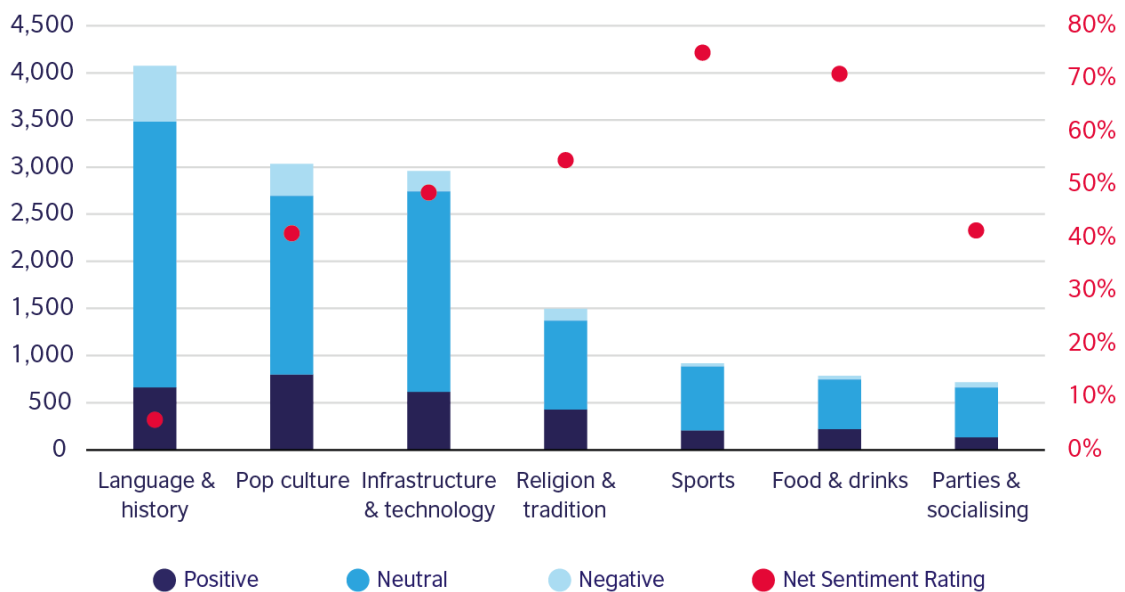
Figure 3: Interest in different aspects of overseas culture



Base: All respondents in Singapore (1,400 respondents)

Social media discussion of three major overseas countries, including the UK, the US and China, supports an interest in overseas history but mentions of overseas countries’ food were comparatively less popular. Meanwhile popular culture such as movies, TV and music attracted relatively more attention than described by survey respondents.

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

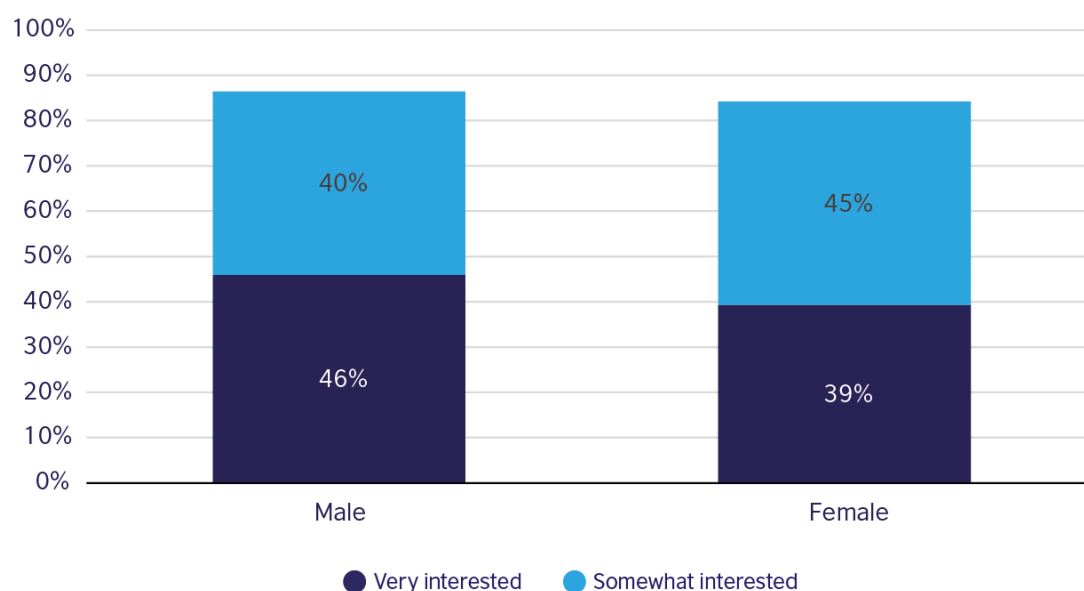
Analysis of the sentiment of these posts shows that discussion of overseas countries' sports and food was the most positive. In these subject areas the net sentiment ratio – defined as the number of positive posts minus the number of negative posts, divided by the total number of positive or negative posts – was over 70 per cent, meaning that positive posts far outnumbered negative ones. More detail on attitudes towards specific countries' culture can be found in Section 3.3.

3.2 Factors affecting interest in overseas culture

A closer look at survey results shows a moderate degree of variation in interest in overseas culture between Singaporeans with different demographic factors.

By gender, male Singaporeans were somewhat more likely to say that they were interested in overseas culture than females – 46 per cent of male respondents said that they were “*very interested*” in overseas study, compared to only 39 per cent of females. However, large majorities across both groups described themselves as at least somewhat interested in overseas culture.

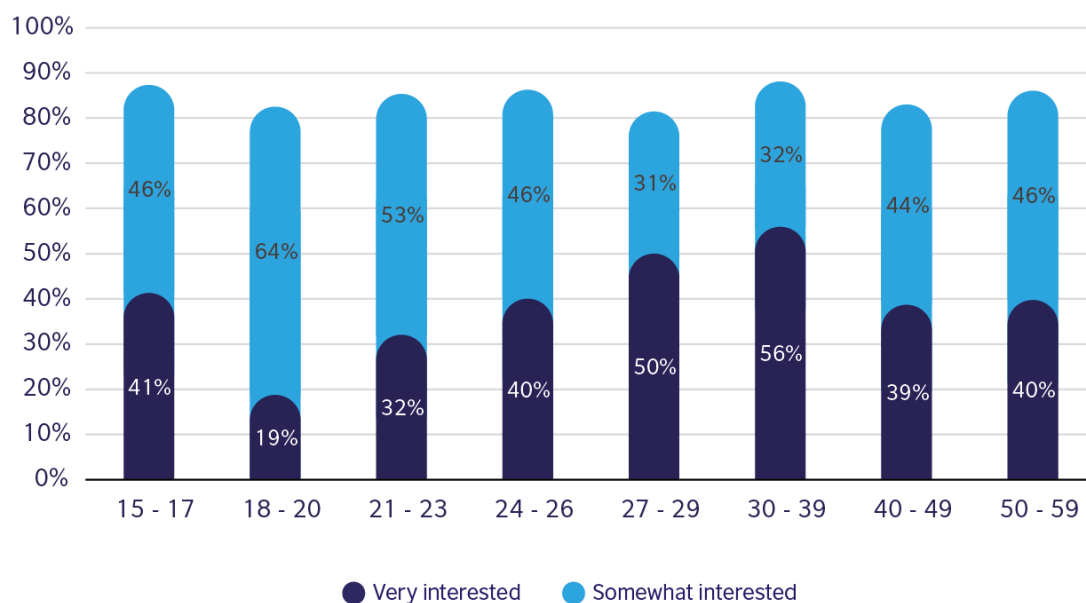
Figure 5: Interest in overseas culture by gender



Base: All respondents in Singapore (1,400 respondents)

Singaporeans in their 30s were the most likely to describe themselves as “*very interested*” in overseas culture, with interest increasing as they approach this age band and falling off afterwards. The youngest age group – 15-17 – was something of an exception here, with a noticeably higher level of interest than older teens and Singaporeans in their early 20s. As with gender, large majorities of all age groups described themselves as at least somewhat interested in overseas culture.

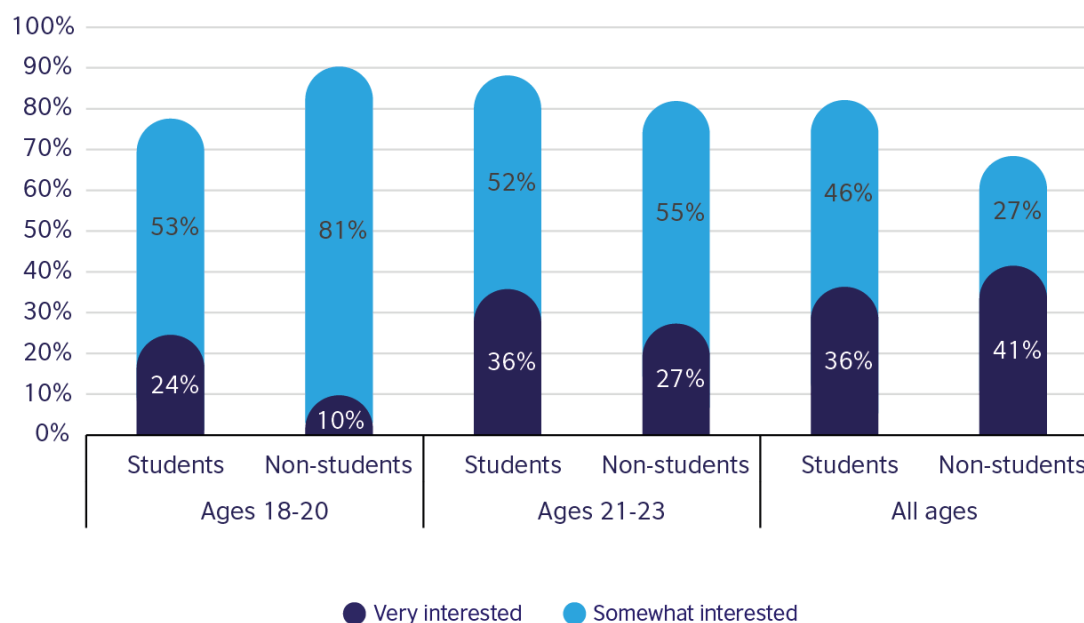
Figure 6: Interest in overseas culture by age



Base: All respondents in Singapore (1,400 respondents)

Within age bands that have substantial numbers of both students and non-students – 18-20 and 21-23 – students were more likely than non-students to describe themselves as very interested in overseas culture. However, the overall level of interest is higher among non-students as a result of the higher interest in overseas culture in older age bands described above.

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



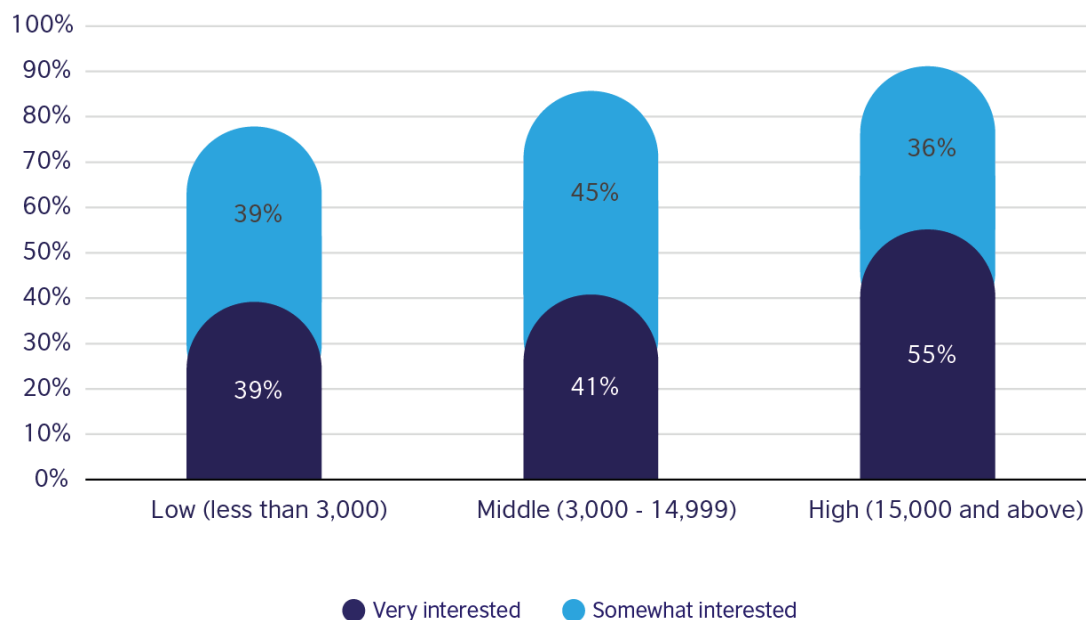
Base: All respondents in Singapore (1,400 respondents)¹

¹ Comparisons for age groups above 23 and below 18 are not shown, due to low numbers of student and non-student respondents respectively

There were also noticeable differences by ethnic group, with ethnic minorities² being substantially more likely to express an interest in overseas culture. 55 per cent of minority respondents said that they were very interested in overseas culture compared to 38 per cent of Chinese-Singaporeans.

A final indicator of interest in overseas culture is household income, with a strong link between increasing wealth and the likelihood of giving a positive answer. 91 per cent of Singaporeans in the highest income band – those with household incomes of S\$15,000 (£8,000) per month or above – said that they were at least somewhat interested in overseas culture. The lowest income band – respondents reporting household incomes below S\$3,000 (£1,600) per month – were the least likely to express interest with only 39 per cent describing themselves as very interested and 77 per cent saying that they are at least somewhat interested.

Figure 8: Interest in overseas culture by monthly household income



Base: All respondents in Singapore (1,400 respondents)

As noted in the previous section, survey participants were also asked about the extent to which their attitudes had changed over the last year.³ Male Singaporeans and those with higher income levels were more likely to say that their level of interest had increased over the last year despite the Covid-19 pandemic, while the variation by age showed that people's attitudes became more positive towards their 30s, with older and younger groups giving less positive responses. However, no group gave an overall net negative response, with only small proportions of each category saying that their interest in overseas culture had decreased over the previous 12 months.

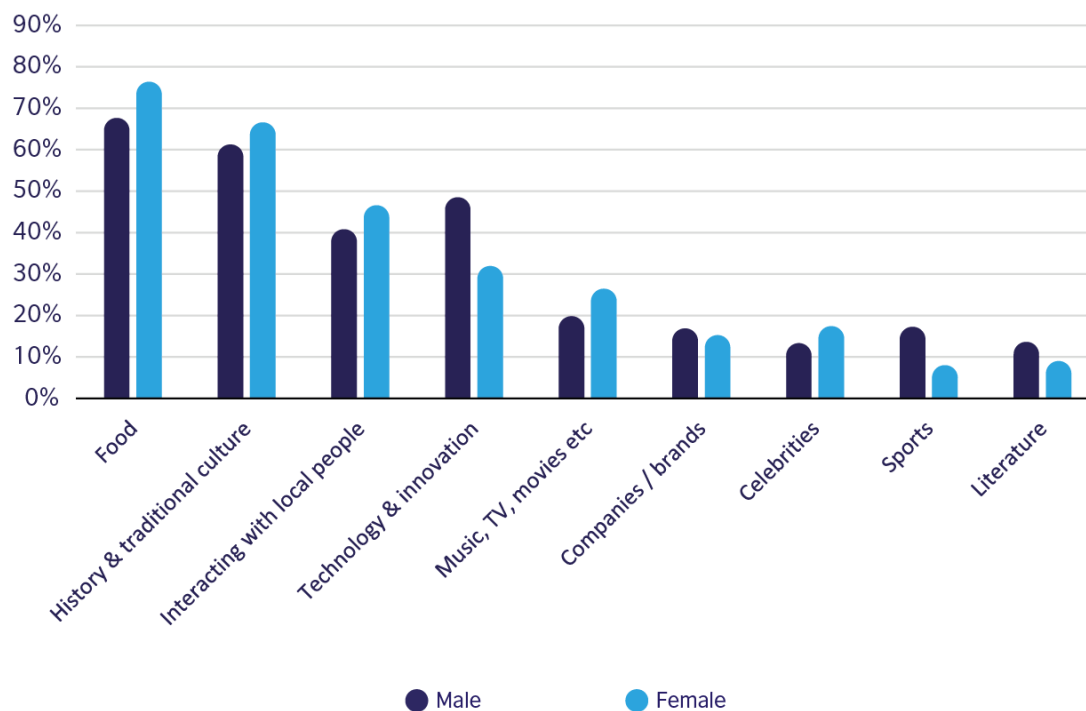
Interest in some of these topics varies significantly by gender. Male respondents were more than twice as likely as females to name sports among their top three aspects of overseas culture, while technology had an even larger gap in absolute terms with 49 per

² The term "ethnic minorities" refers to all groups other than Chinese-Singaporeans

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

cent of male respondents naming this among the three aspects of overseas culture that they were most interested in compared to less than a third of female respondents. In the other direction, female respondents were relatively more likely to say they were interested in overseas media and celebrities, as well as to a lesser extent food, history and interacting with local people.

Figure 9: Interest in different aspects of overseas culture by gender

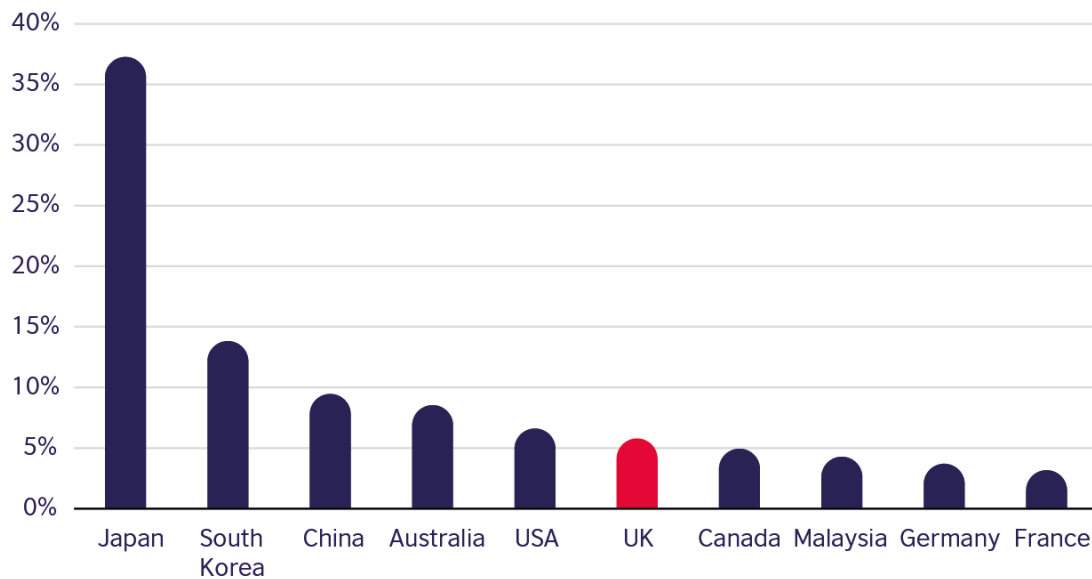


Base: All respondents in Singapore (1,400 respondents)

Analysing the answers to this question by age shows that history & traditional culture as well as technology are more popular among older groups, while some other aspects of overseas culture – particularly popular culture such as music, TV and movies – are comparatively more popular among younger Singaporeans.

3.3 Interest in specific overseas countries' culture

When asked to name their preferred overseas country in terms of culture, Japan stood out as the clear leader. Among survey respondents who said they were interested or very interested in overseas culture, 37 per cent said that they saw Japan as the most interesting country in cultural terms – well over twice as many as the proportion who named the second-most popular country, South Korea, and six times the UK's 6 per cent share of respondents. Overall, the UK was the 6th most preferred country in terms of culture.

Figure 10: Preferred overseas country in terms of culture

Base: Respondents at least somewhat interested in overseas culture (1,194 respondents)

Focus groups confirmed that Japan was the country most commonly seen as attractive. The country was praised for its peaceful living environment, natural scenery, food, well-mannered and polite society, and valuing both the traditional and modern elements of its culture. Japan's manga and anime series were also named as attractive, as well as its high-technology brands.

South Korea was particularly attractive among younger respondents due to the strength of the country's media – including both K-Pop and K-Drama. Some Singaporeans commented that this has changed substantially over the past 20 years, with Korean (and other Asian) media becoming more original rather than simply copying the US; social media and the internet were also named as having increased access to non-English media.

Some parents mentioned that Chinese music and media were becoming more popular among their children's generation – some mentioned content on the TikTok social media app, which is operated by a Chinese company, as having a major influence here. China was also described as a rapidly developing country that is highly advanced in technology and innovation and has excellent infrastructure such as high-speed trains.

Meanwhile Australia was seen as offering a balanced lifestyle with high quality of life along with an open society and stable government, with a population that are "not so driven by money". The country's ethnic diversity was also named as an advantage by some focus group participants, who commented that this also made it easy to find familiar food options.

While only a relatively small number of people who named the US as their favourite overseas culture, aspects of this country's culture were widely discussed in focus groups showing this country's strong international influence. The US was highly prominent in discussions of media due to the presence of online streaming platforms

such as Netflix and Hulu, with the majority of participants constantly consuming English-speaking media. There was general agreement that the US leads the world in technology and innovation despite competition from China.

The UK was not initially mentioned when focus group participants were asked to name their preferred country in terms of culture, while only 6 per cent of survey respondents named the UK as their favourite overseas country. The UK was also not named in discussions of the countries offering the best living environment or having strengths in technology and innovation – a lower level of awareness of UK technology compared to other countries such as the US or China means that the country is seen as less technologically innovative than other top countries.

When it comes to entertainment, the UK is regarded positively by some Singaporeans – for example a focus group participant who said that they “appreciate the UK style of humour” or those that like to watch English football – but most Singaporeans associate English-language entertainment media with the US rather than the UK. In general UK content is more popular among older age groups, while younger Singaporeans have less awareness and therefore a lower level of interest.

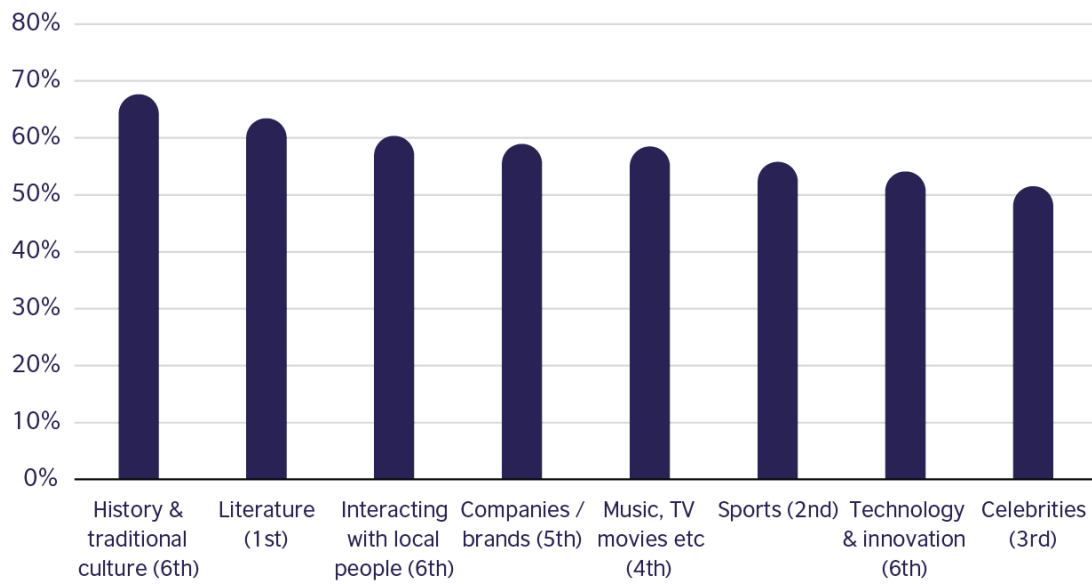
When asked specifically about their perceptions of the UK, Singaporeans associate the country as having a long-standing heritage, a well-mannered society, a unique style of humour, and especially as being an excellent destination for higher education with world-ranking universities and a long history of academic excellence.

Among the 10 countries mentioned in the survey, the UK was the 6th most likely country to be named as Singaporeans’ favourite in terms of culture. The four countries named on the survey that were seen as less attractive than the UK were Canada, Malaysia, France and Germany. In general these countries attracted relatively little mind-share among Singaporeans, with none highlighted in focus groups as having attractive media or technology although France was mentioned by one participant for its food and history and laid-back work culture.

When Singaporeans were asked about countries’ attractiveness in terms of specific aspects of overseas culture, Japan was again the strongest-performing country overall, having the highest proportion of respondents describing it as attractive or very attractive in three of the eight broad areas covered in the survey: technology and innovation, interaction with local people, and history and traditional culture. The US was also ranked as top in three fields – celebrities, companies & brands, and sports – while Korea was seen as having the most attractive media and the UK as being the best in terms of literature.

Aside from the UK’s strength in literature, the country was also seen as the second most attractive country in terms of sports and the third in terms of celebrities – although in the latter case the number of respondents saying the UK was attractive was far lower than the proportion who said the same for the US or South Korea.

Figure 11: Attractiveness of the UK in terms of different aspects of culture



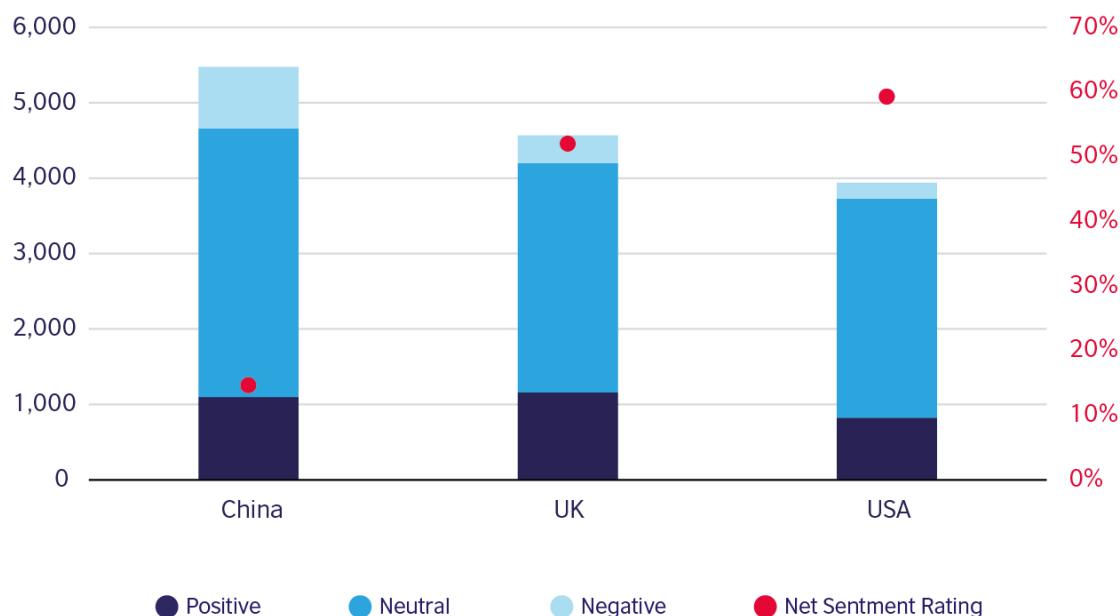
Base: All respondents in Singapore (1,400 respondents)

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 Singaporeans; 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 Singaporean food; drinking culture

The country attracting the most social media posts in these subject areas was China, but the country with the highest net sentiment ratio (NSR)⁴ was the United States. Although the UK's proportion of positive posts was slightly lower, the total number of positive posts about the country was higher than that for the US due to having a greater volume of discussion, as well as being higher than that for China.

Figure 12: Social media post volume and net sentiment ratio by country (UK, China & USA)

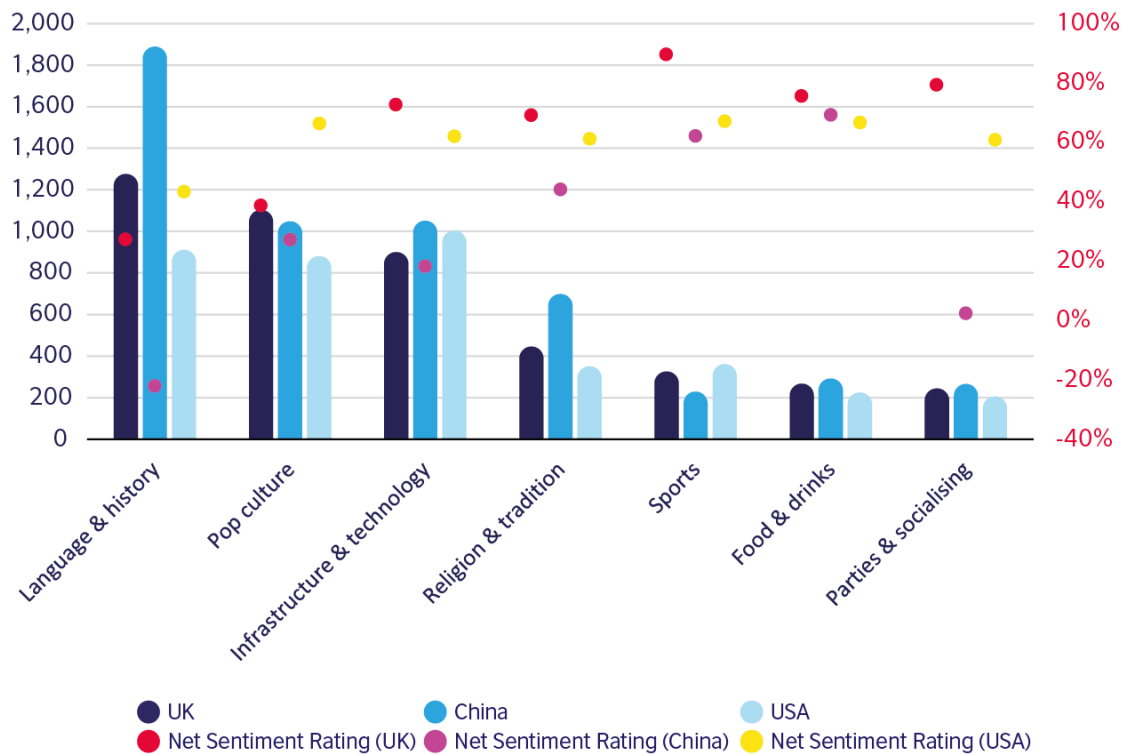


Base: Social media posts discussing the UK, US or China in terms of culture, June 2019 – March 2021

By topic, the largest proportion of UK-related posts are related to the country's language and history, followed by popular culture (including movies, music etc) infrastructure & technology and tradition & religion. While China attracts more discussion in almost all fields aside from popular culture and sports, the net sentiment ratio of posts related to the UK is higher than that for posts related to China in all fields. UK-related sentiment is also higher than that for US-related posts in most fields, although the US has a particularly strong advantage in terms of popular culture that means posts about that country are more positive than those related to the UK on average.

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 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 asked about their perceptions of the UK, focus group participants’ strongest impression was about the country’s long heritage and perceptions of British people as having good manners and “proper upbringing”. Several participants mentioned the country’s ties to Singapore through the Commonwealth, while others talked about the UK’s advantages in terms of history and as the origin of the English language. Additionally, there is a good degree of affinity towards the UK especially amongst older Singaporeans due to historical interaction between UK and Singapore during the colonial era, with many associating the UK with being a well-established and highly civilized country.

On the other hand, some Singaporeans – including those with generally positive impressions of the UK – see the country’s strengths as lying mainly in the past. When describing the advantages of the country, one Singaporean said that these were because the UK “*was once a great country*”, while some younger participants saw the UK as conservative and old-fashioned.

Perhaps the strongest advantage of the UK in the eyes of many Singaporeans is the country’s education system. The UK was regarded as the top destination worldwide for higher education, with long-established and renowned educational institutions associated with education excellence but still staying relevant in the modern era. People also mentioned key political figures that have been educated in the UK and similarities between the UK and Singaporean education systems, increasing the attractiveness of UK

education to Singaporeans. Attitudes towards overseas education are discussed in more detail in Section 4.1.

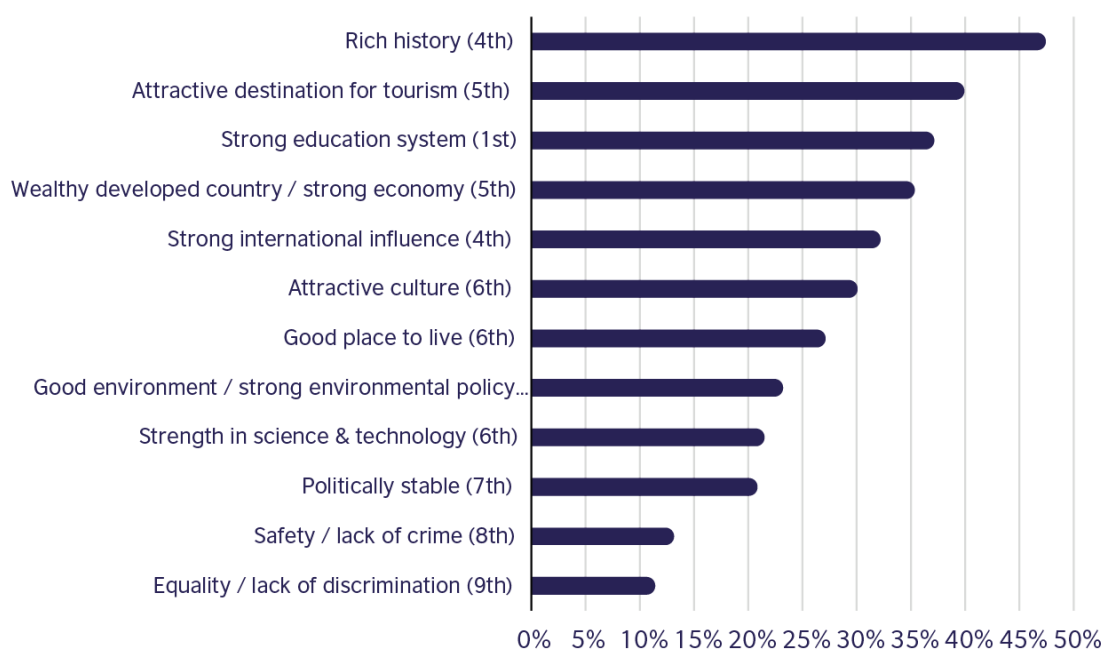
Other advantages of the UK described by focus group participants include a higher degree of freedom of speech than Singapore – with a key example being the level of media criticism of politicians and the Royal Family. The UK’s diversity and openness towards foreign communities was also praised by some participants, especially younger people. However, not all agreed – in particular, members of Singapore’s Muslim community are concerned about British people’s perceived lack of acceptance towards Muslims. UK tolerance of different lifestyles is also not universally seen as a positive thing, with one parent mentioning that the UK’s acceptance of homosexual relationships was a point of concern when considering sending their child to study in the UK.

Food and weather were also seen as negative factors for the UK. Weather that is “harsh, cold [and] rainy with grey sky and less sun” is a key pain point for Singaporeans, while UK food was described as “the worst” by one participant. These opinions were common among Singaporeans that had visited the UK as well as those that had never been, showing that they are not only a matter of perception.

Finally, some focus group participants commented that the UK’s handling of the Covid-19 crisis had affected their view towards UK in a negative way.

When asked to choose several countries’ strengths and weaknesses from a list, survey respondents were more likely to say that the UK had a strong education system than they were to describe any other country in this way, with a relatively large percentage also describing the country as having a rich history – but the UK’s performance in other aspects was unremarkable, ranking between 4th and 9th among the list of 10 overseas countries.

Figure 14: Perceptions of UK strengths

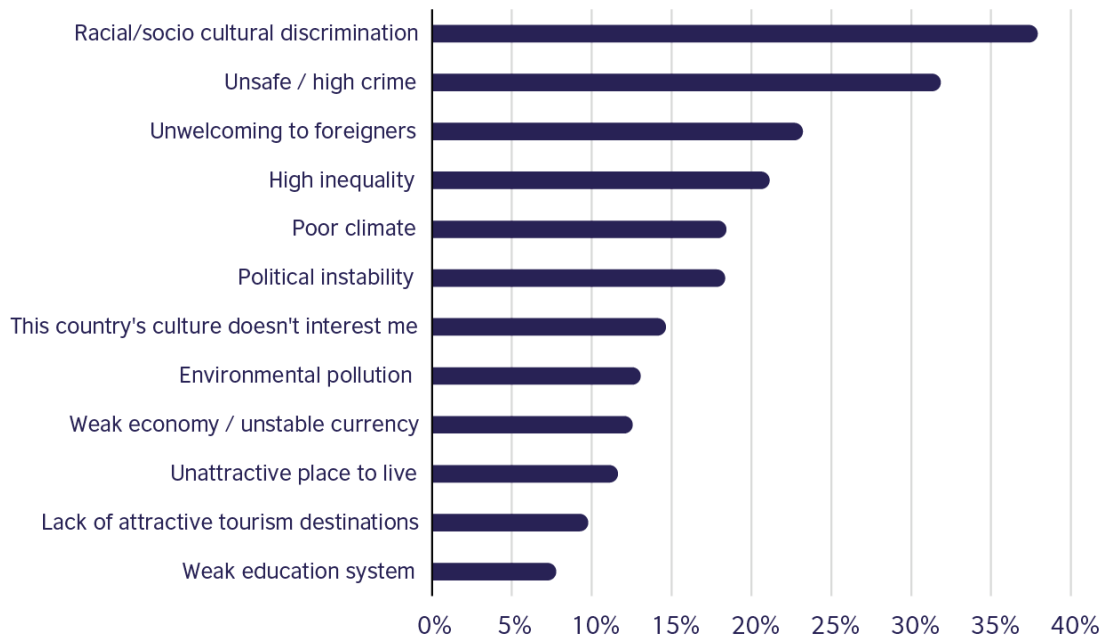


Base: All respondents in Singapore (1,400 respondents)

In contrast Japan was rated top in six of the twelve categories that survey respondents were asked about, including history, strength in science and technology, attractiveness as a tourism destination, overall cultural attractiveness, safety, and good environment. Canada was ranked top in three categories – equality / lack of discrimination, political stability, and being a “good place to live” – while the US led in terms of economic strength and international influence.

On the other hand, Singaporeans were also unlikely to name the UK when asked about countries with major disadvantages. The country’s biggest disadvantage was seen as racial discrimination, where the UK was the third most likely country (after the US and Australia) to be described as having this problem. A lack of safety was also a concern for almost a third of Singaporeans, although this was a much smaller proportion than those that said the same thing about the US. The least-chosen UK weakness was “weak education system”, with only 8 per cent of Singaporeans saying that this applied to the UK.

Figure 15: Perceptions of UK weaknesses



Base: All respondents in Singapore (1,400 respondents)

3.5 Perceptions of people from different countries

As noted above, Singaporean focus group participants had a stereotype of British people as civilised, polite and well-mannered, with a unique style of humour, but also as conservative and “*a bit reserved*” compared with Americans.

This perception appeared to be common among both younger and older participants, although those that had more experience of the UK were also likely to describe British people as open-minded and more open to interacting with strangers in comparison to Singaporeans.

Singaporeans also saw Japanese people as well-mannered and respectful. People from other South East Asian countries were seen as friendly, while people from Australia and New Zealand were seen as living a relaxed and laid-back lifestyle and having a positive mindset.

Survey respondents were also asked about their perceptions of British people. Among 12 statements, the most commonly agreed with were that people from the UK are proud of their country and value their culture, followed by a description of British people as friendly and helpful. The statements with the least agreement were descriptions of British people as disciplined and hard-working, both of which received only 17 per cent agreement.

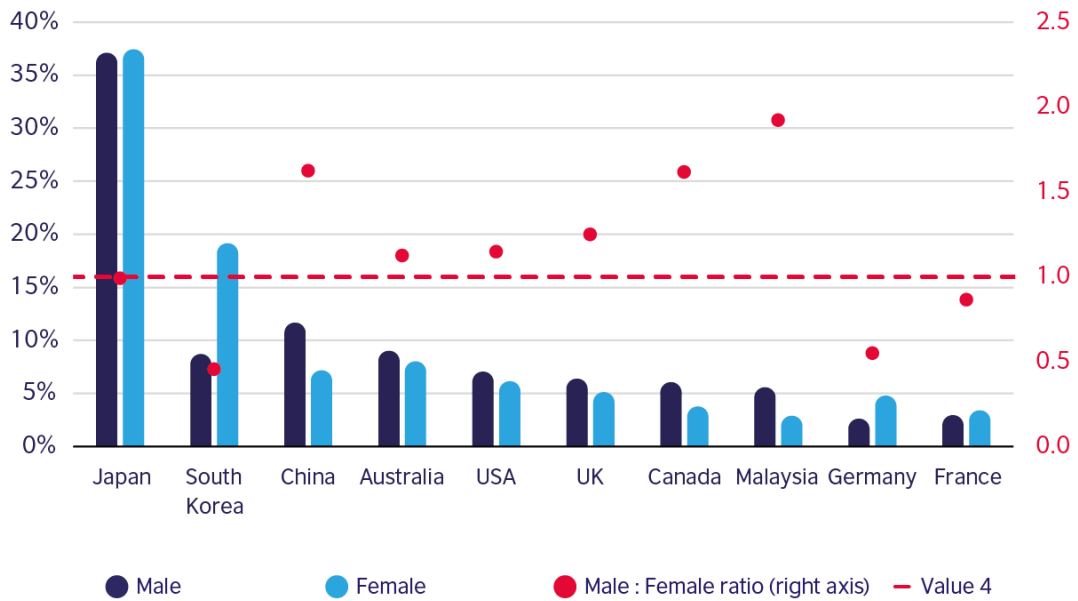
On most of these questions, results for the UK did not particularly stand out from other overseas countries that survey respondents were asked about. However, on the questions on hard work and discipline perceptions of the UK were substantially more negative than those on nearby Asian countries; in this area Japan had the most positive perceptions with 69 per cent of Singaporeans seeing Japanese people as hard working. Germany also performed well on these questions, while other Anglophone countries had similar scores to the UK and France performed even more poorly.

3.6 Factors affecting interest in different countries

There are clear gender differences between the people who say they are interested in the culture of particular countries. South Korea had the largest difference, with a gap of more than 10 percentage points and more than twice as many female respondents describing this as their favourite overseas culture compared to males. In comparison China had a substantial gender gap in the opposite direction, with male Singaporeans much more likely than their female counterparts to describe it as the most attractive country.

Preference for the UK also varied somewhat by gender, with male respondents slightly more likely to name this country as their favourite overseas country in cultural terms. However, this difference did not meet the threshold for statistical significance and could be explained by random effects given the relatively small number of Singaporeans naming the UK as their preferred overseas culture.

Figure 16: Preferred overseas country in terms of culture, by gender

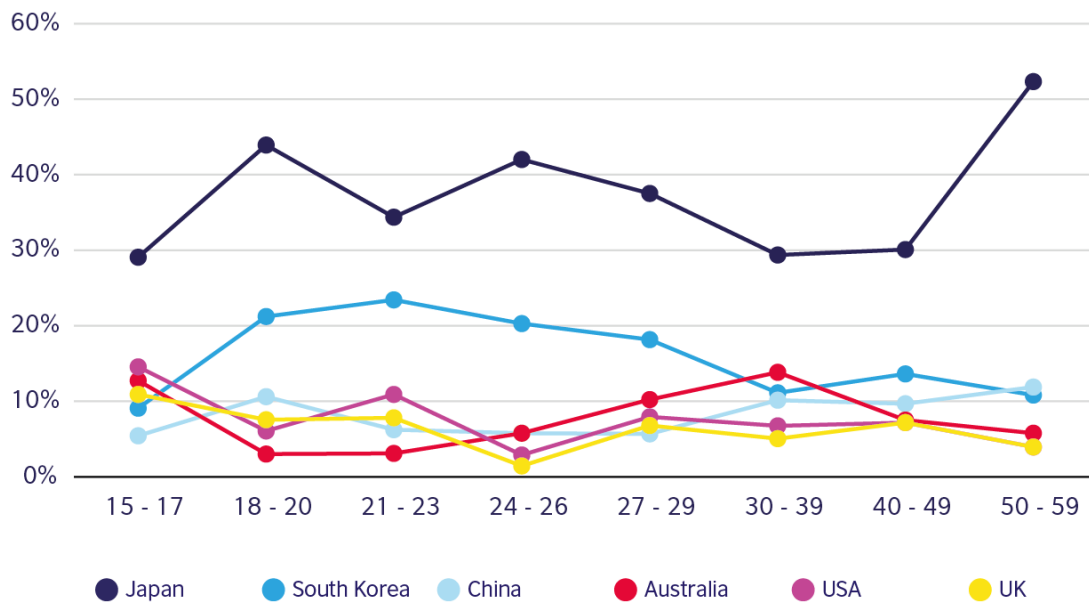


Base: Respondents at least somewhat interested in overseas culture (1,194 respondents)

Breaking down the data by age suggests that preference for the UK seems to be slightly stronger among younger Singaporeans, although again the relatively low number of respondents preferring UK culture means that these differences do not meet the standard for statistical significance. The clearest trend by age is in preference for Korean culture, which is generally more popular among younger age groups (with the exception of the 15-17 age group where the number of responses was again limited) than among Singaporeans in their late 20s and above. Nevertheless, Japan remains the most popular country with survey respondents of all ages.

Focus groups confirmed the stronger preference for Korean culture among young people, while these groups did not reveal any major age-related differences in interest in the UK.

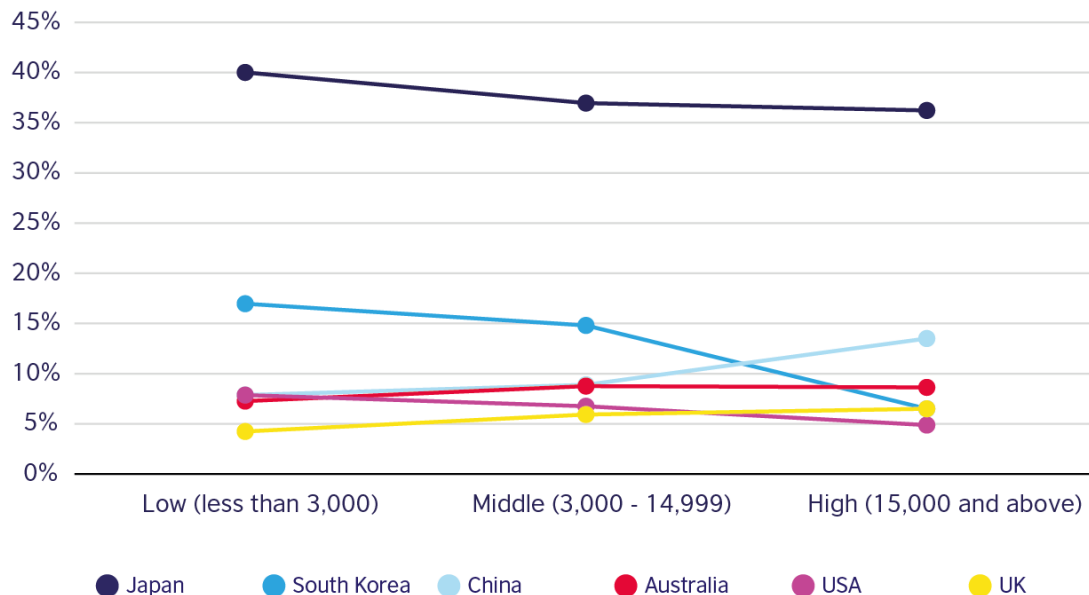
Figure 17: Preferred overseas country in terms of culture, by age



Base: Respondents at least somewhat interested in overseas culture (1,194 respondents)

Comparing Singaporean survey respondents by income level, there is a definite trend for those with lower self-reported household incomes to have a stronger preference for Korean culture, while interest in the UK is positively correlated with income levels. Attitudes towards China also become more positive with increasing income, while there is also a weak negative correlation between income and interest in Japanese culture.

Figure 18: Preferred overseas country in terms of culture, by monthly household income



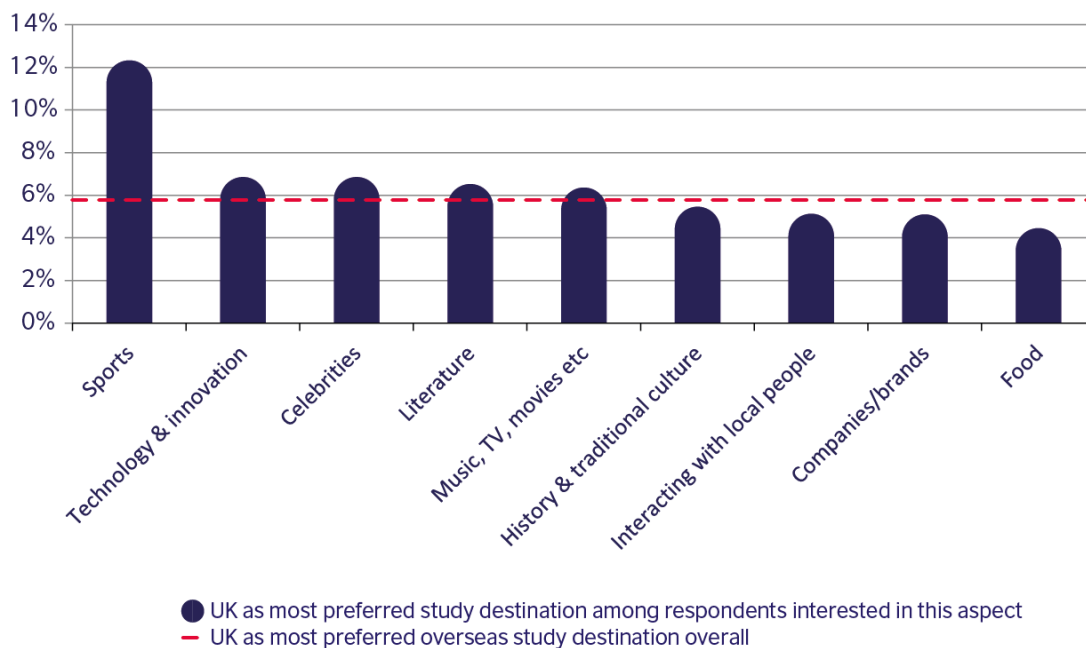
Base: Respondents at least somewhat interested in overseas culture (1,194 respondents)

Beyond demographics, a person’s preferred aspects of overseas culture also have a direct influence on which countries’ culture they find attractive. There was a surprisingly strong connection between interest in overseas sports and a preference for UK culture,

with people who named sports among the three aspects of overseas culture they find most interesting being twice as likely as other groups to express a preference for the UK – although this may partly be due to random effects given the relatively low number of people naming sports among the top aspects of overseas culture. Meanwhile the UK was slightly more likely to be named as the top overseas culture by people interested in technology, celebrities or literature, while those who named food among the top aspects of overseas culture were particularly unlikely to prefer the UK.

Preference for other countries was also affected by the aspects of overseas culture that respondents found interesting. While Japan was the clear favourite overseas country overall, it fell well short of Korea in the group that said they were interested in overseas celebrities, and behind China among those who named literature as the top aspect of overseas culture. Japan's advantage over Korea was also much smaller among Singaporeans that expressed an interest in overseas media such as TV, music and movies than it was across the whole sample. Meanwhile Japan did particularly well among people interested in food or in interacting with local people, while the US did well among those interested in companies, media, literature, technology and sports but much more poorly among Singaporeans who named history or food as one of their top cultural interests.

Figure 19: Preference for UK culture by interested aspects of overseas culture



Base: Respondents at least somewhat interested in overseas culture (1,194 respondents)

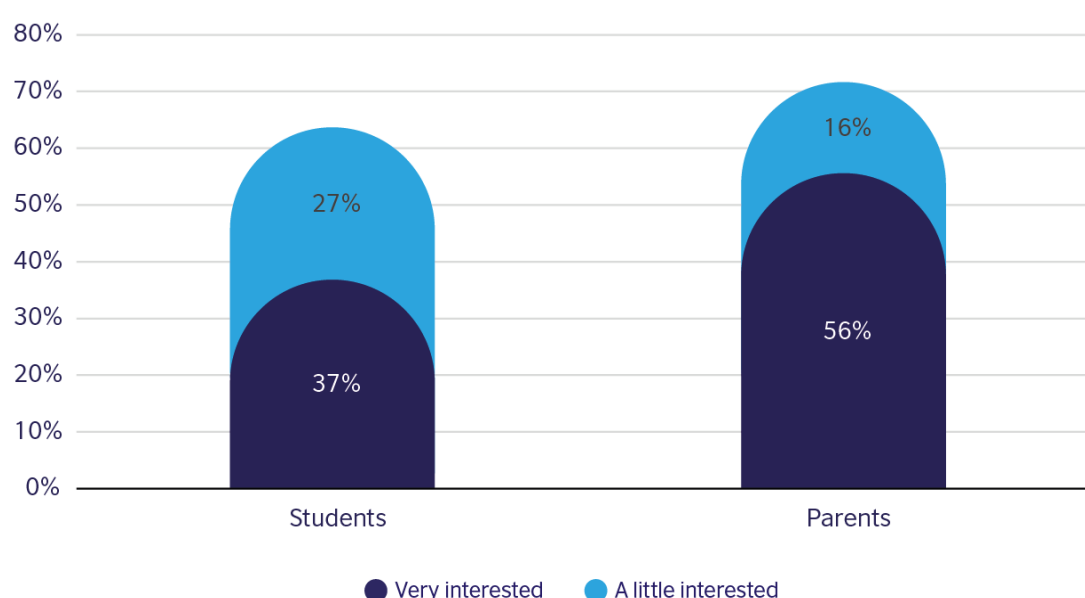
This broadly matches the relative standings of the UK when Singaporeans were asked about attractiveness of specific aspects of the country's culture as described in Section 3.3, showing – perhaps unsurprisingly – that country preference is strongly affected by a country's strength in the areas a person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

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

4.1 Interest in overseas education

A relatively high proportion of Singaporean young people claim to be interested in studying abroad. More than a third of surveyed students described themselves as “very interested” in overseas study, with nearly two thirds describing themselves as at least “a little interested”. Parents seemed even more positive, with 56 per cent saying that they are “very interested” in sending their child to study abroad and almost three quarters expressing at least some interest.

Figure 20: Students’ and parents’ interest in overseas study



Base: Students (190 respondents) and parents (448 respondents)

Despite the strength of Singapore’s domestic education system the country has a long tradition of sending students to study abroad, with UNESCO reporting a total of almost 24,000 students studying tertiary programmes overseas in 2018 – around a third of the number of students studying university courses within Singapore. However, even this high level of outbound mobility is still lower than the proportion reported by survey respondents, meaning that many of the students who describe themselves as interested or very interested in overseas study will likely eventually decide not to go abroad. Reasons for this change in attitude include practical aspects such as high tuition fees and the need to spend a long period away from home, although Singapore’s high incomes means that the proportion of students who will change their minds for financial reasons is likely lower than the corresponding group in other ASEAN countries.

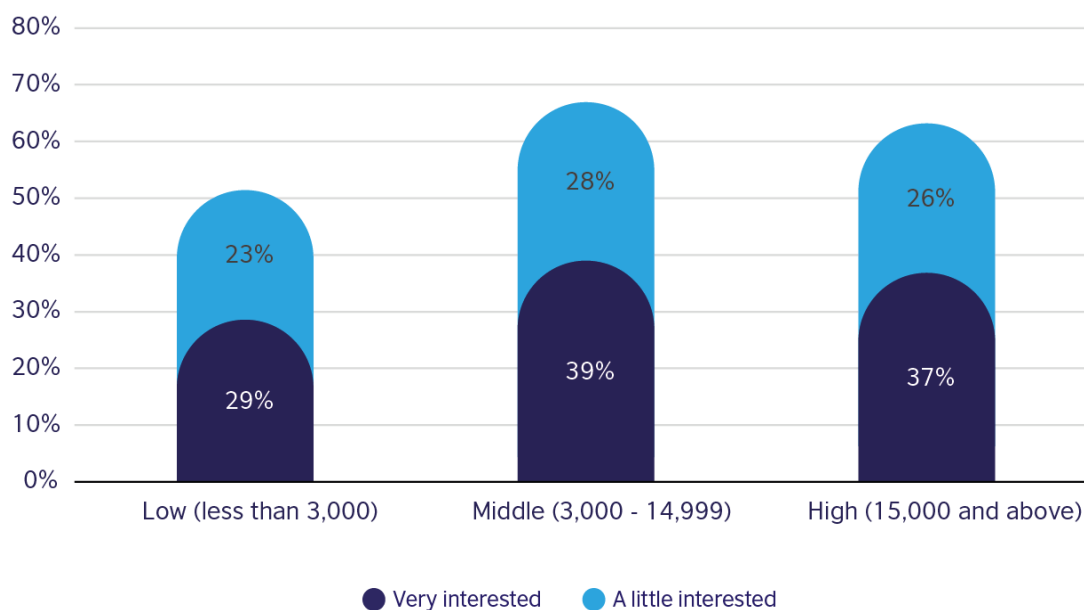
Focus group discussions also reflect a strong regard for overseas education. Although the majority view Singapore’s higher education as solid or even world-leading, there is a perception that foreign universities – especially those in the UK and US - offer better career opportunities, with overseas graduates obtaining higher pay and easier

promotions. Parents also see international universities as an attractive option as they expose their children to overseas culture.

Students at all levels of study expressed an interest in studying abroad, but the group with the highest level of interest was current high school students. More than half of students in the under-18 age group described themselves as “very interested” in overseas study compared to 31 per cent of those aged 18-20 and 24 per cent in the 21-23 range. The particularly high level of interest in younger age groups reflects the large proportion of Singaporean overseas students who go abroad at the undergraduate level, while many those in the university age range will have already considered overseas study but decided not to study abroad.

Income is also a predictor of opinions on overseas study. While a little over half of students were interested in overseas study even in the lowest of the income bands analysed in the survey, the proportion of respondents with higher incomes was substantially higher. However, in contrast to other countries, there did appear to be threshold effects, with no statistically significant difference between respondents in the top income band and those in the middle group of households.

Figure 21: Students’ interest in overseas study by monthly household income



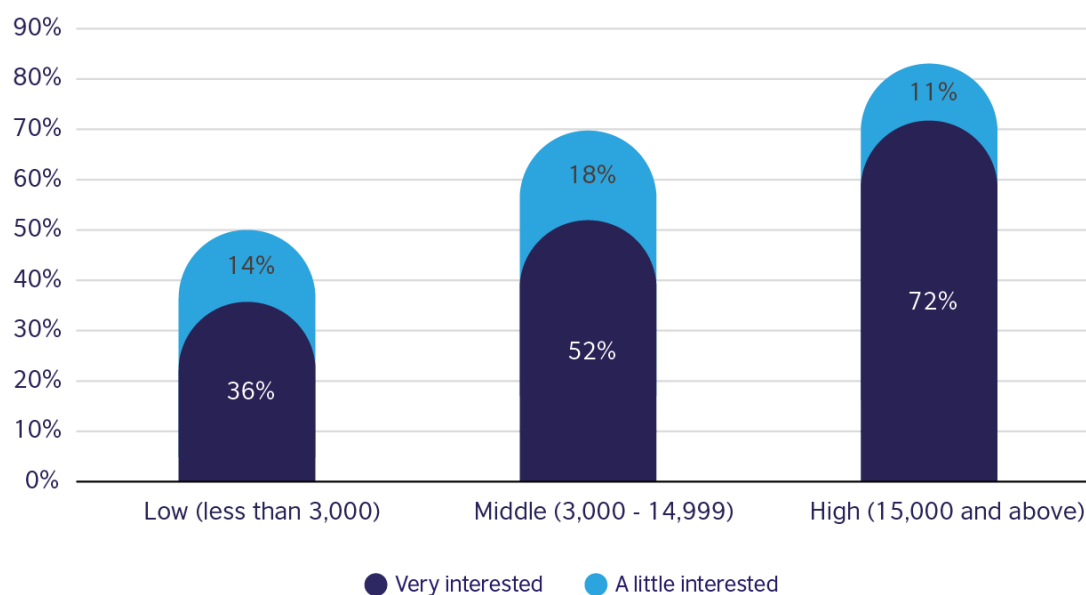
Base: Students (190 respondents)

As with overall interest in overseas culture, there was little difference between male and female respondents in the proportion of students describing themselves as at least a little interested in overseas study. However, female respondents were noticeably more likely to describe themselves as “very interested”, with 42 per cent of female students giving this answer compared to only 31 per cent of males.

Statistics from the UK’s Higher Education Statistics Agency (HESA) show that student mobility to the UK is roughly balanced in terms of gender. Overall, 53 per cent of Singaporean students studying in UK higher education institutions are female, which is closer to equality than the proportions of domestic students in the UK.

As noted above, Singaporean parents are somewhat more likely than the students themselves to be interested in sending their children to study abroad. One other notable difference between parents and their children is the pattern by household income, with much sharper differences among parents. Overall only half of parents in the lowest income band say they are interested in sending their children to study abroad – still a very high proportion but substantially lower than the 70 per cent of those in the middle-income band who said the same thing or the 83 per cent of the highest-income group.

Figure 22: Parents' interest in overseas study for their children by monthly household income



Base: Parents (448 respondents)

There is also a noticeable gap between the opinions of male and female parents, with fathers substantially more likely than mothers to describe themselves as interested in sending their child to study overseas.

When deciding on a study location, both Singaporean students and their parents see education quality as the most important factor, with around two thirds of each group naming this among the factors when making a decision. This was also described as very important in focus group discussions: recognition and value of the degree were described as the most important factors, but these were often seen as driven by academic excellence and university ranking (although recognition by the Singaporean government was also a factor here). A track record of high-achieving alumni and graduates was also seen as important by focus group participants.

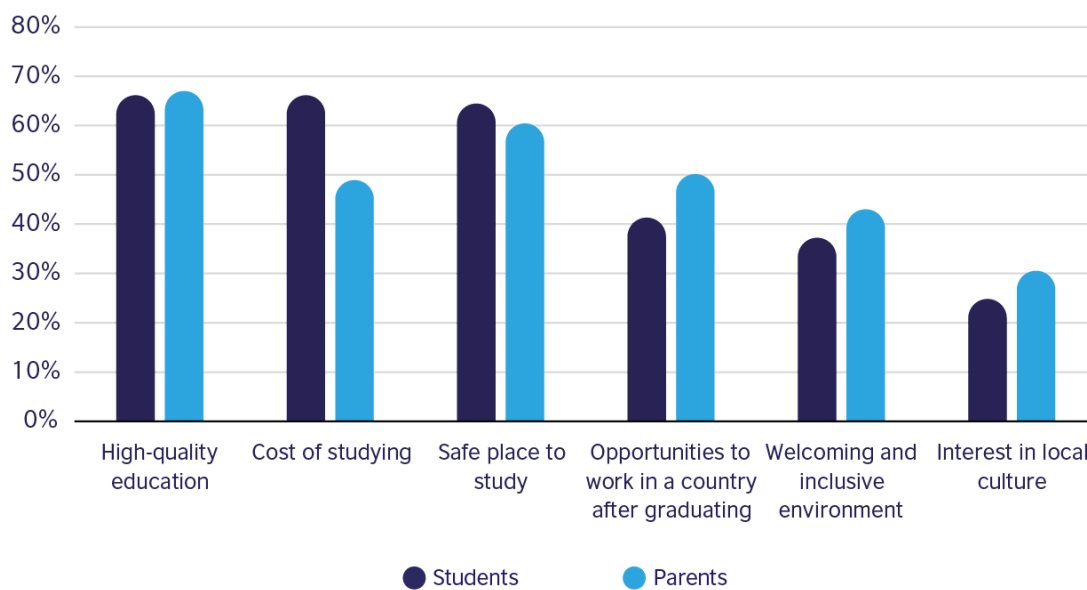
Safety was also a very important factor. This includes not only physical safety but also aspects such as healthcare – one prospective overseas student described their parents as particularly concerned about a country's healthcare coverage. Meanwhile the financial costs of studying abroad were seen as the second most important decision factor among students and the third for their parents, behind safety. Parents generally expressed more concern about financial issues than the prospective students

themselves, as in most families the parents would be mostly responsible for paying the cost of overseas study.

Other factors are comparatively less important to both students and their parents. While focus group participants did discuss issues like international student support, overseas work opportunities after graduation and the overseas cultural environment, these were seen as less important than the main factors discussed above. Only 41 per cent of surveyed students described work opportunities as important compared to around two thirds naming education quality, costs and safety.

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 after graduation; only a quarter of students and 31 per cent of parents described culture as an important factor in their decisions.

Figure 23: Students' and parents' important factors when considering a country for overseas study



Base: Students interested in studying overseas (121 respondents) and parents interested in their children studying overseas (321 respondents)

When asked about their first-choice country for overseas study, both students and parents in focus groups named the UK. This also matches the results of focus discussions, where the UK was the most-named country in all groups for this purpose and the majority of participants agreed that this was the most attractive country for overseas study.

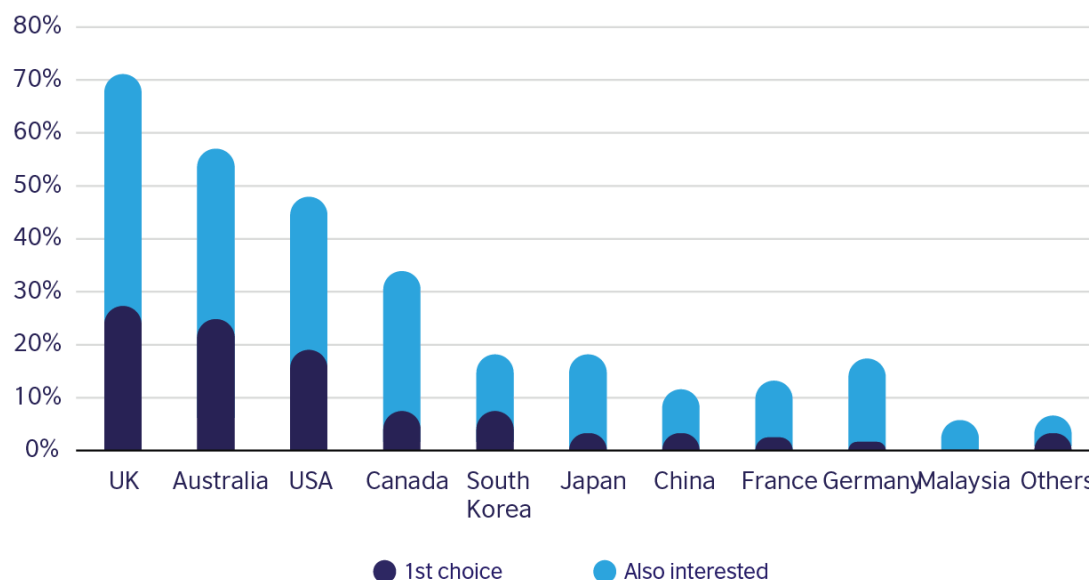
Aside from the UK's large number of top-ranked world universities and long history in international education, the UK's historical connections with Singapore are also seen as an advantage – including the number of high-profile Singaporeans educated in the UK and the similarity between the two education systems. One alumnus commented that

recognition is also a factor, saying that although the US has “*a lot of universities that are the top ones*”, it also has some non-accredited institutions; however, it is not clear how widely these views are held.

Other Anglophone countries including Australia, the US and to a lesser extent Canada are also well regarded in terms of education. The US is favoured for its highly-ranked universities, flexible and open higher education system and successful alumni, while Australia was described as having an established education system, good living standards, a balanced and inclusive society with a large Asian minority, and strong opportunities to succeed post-graduation.

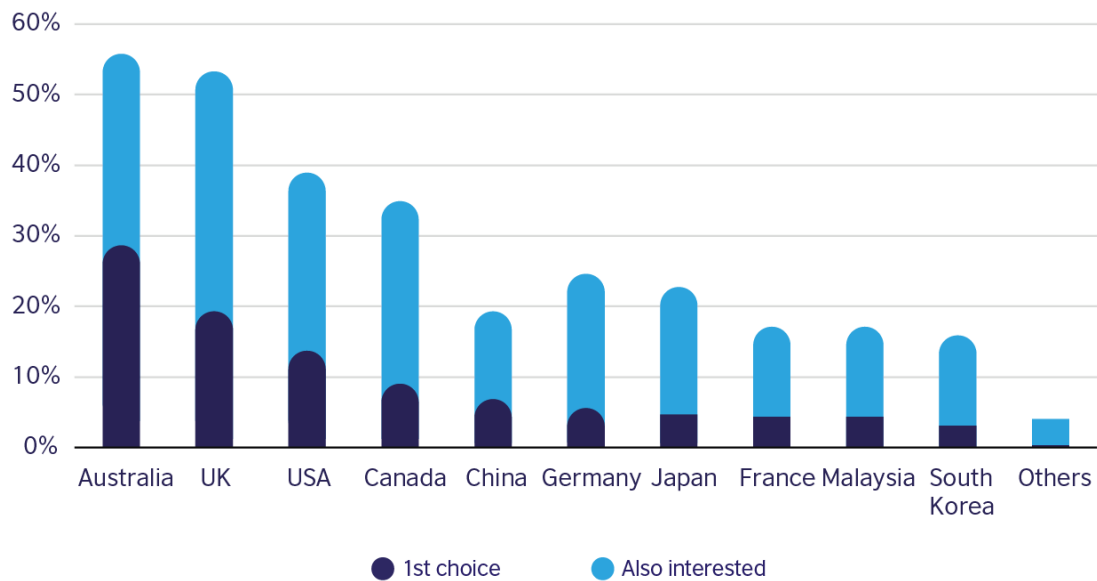
Non-Anglophone countries were much less likely to be mentioned. The most popular was South Korea, named by only 7 per cent of students, with a further 11 per cent saying they would potentially be interested in studying there even though it was not their first choice. Germany was also relatively attractive due to its low cost, but language was seen as an issue.

Figure 24: Students’ preferred countries for overseas study



Base: Students interested in studying overseas (121 respondents)

In comparison to students, the top choice of country among parents was Australia – perhaps due to its closer geographical location. The UK was the second most popular choice among this group, followed by the US and Canada. The most popular non-Anglophone choices were China and Germany, but these were again far less popular than the major English-speaking study destinations.

Figure 25: Parents' preferred countries for overseas study

Base: Parents interested in their children studying overseas (321 respondents)

Social media analysis shows that the student experience is the most common discussion topic in Singaporeans' online discussions of education in three key countries (the UK, US and China). This topic includes students' overseas study experience as well as enthusiasm and anticipation about studying abroad.

The second largest topic overall, and the top category for discussion about UK education, is discussion of future prospects – often related to employability after graduation. The number three topic in both the UK and overall is about scholarships.

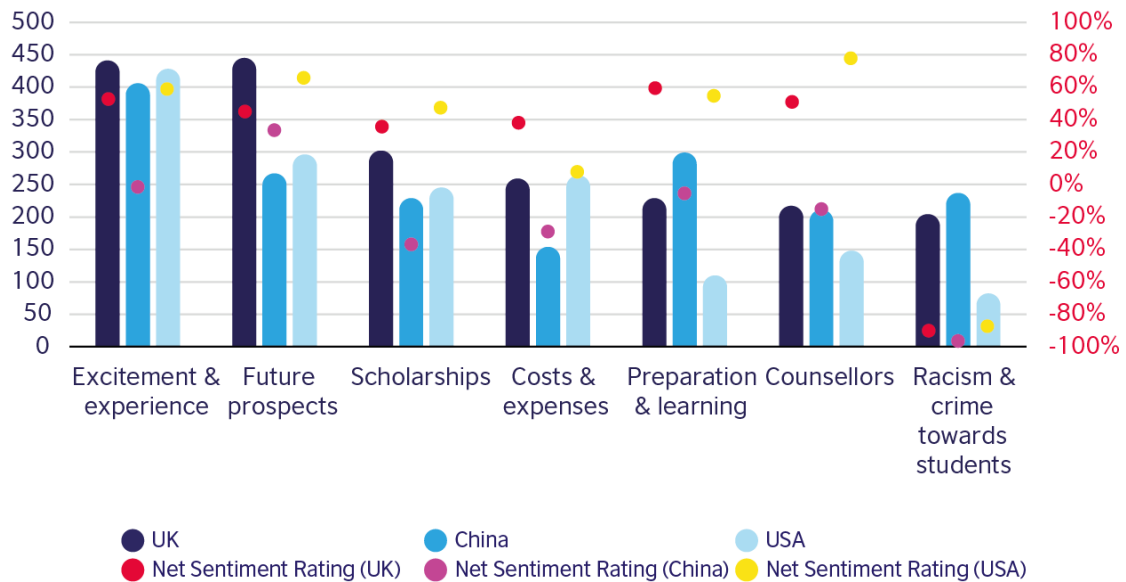
In contrast with discussion about overseas culture – but in line with the country's leading market share as Singapore's top overseas education destination – the UK was responsible for the highest volume of Singaporeans' posts about overseas education on social media. However, the overall net sentiment ratio was somewhat higher among posts about US education than those about the UK – although both were far higher than China's score which was net-negative overall.

The US had a particularly strong advantage over the UK in terms of sentiment about future prospects, although the volume of posts on this subject about the US was also substantially lower and the overall attitudes towards both countries were positive, discussing university prestige, international exposure and high-paying jobs. Meanwhile there was little difference between the two countries in analysed sentiment about the student experience, with excitement over the idea of studying in a Western country, and the UK had a more positive rating when it came to posts about the cost of studying abroad. All countries had positive mentions around announcements on social media about getting admission in desired universities, sharing stories and experiences, and offering guidance to aspiring students

Conversations on education in China tended to have a much more negative tone. Part of this was related to the medium of instruction, with the need to study in Mandarin.

Meanwhile discussion of racially charged incidents on campus and discriminatory occurrences gained quick traction in online communities with strong negative sentiment.

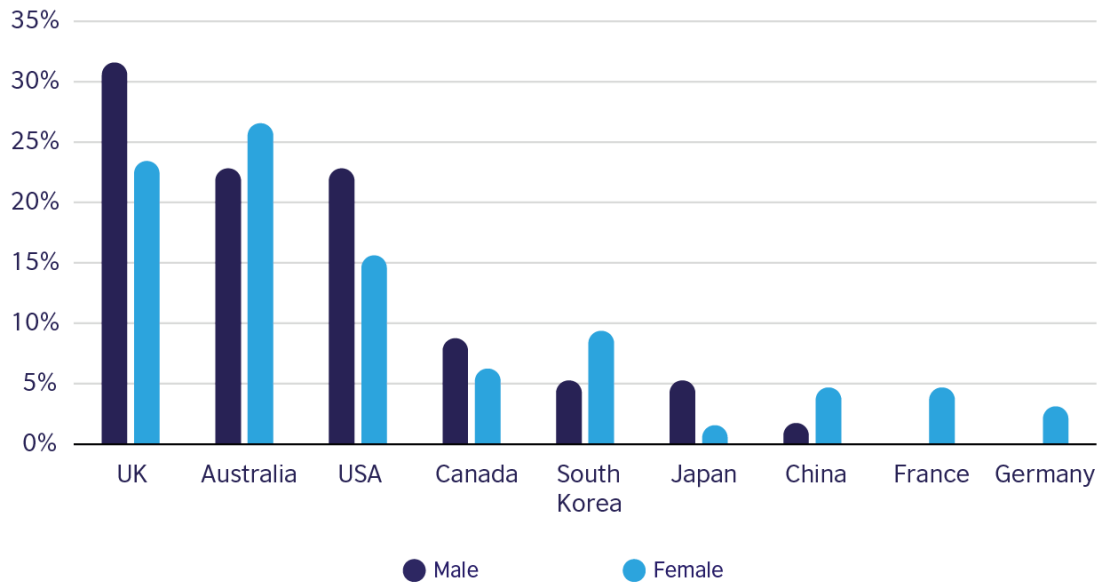
Figure 26: Social media post volume and net sentiment ratio by aspect of overseas education



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

Breaking down the survey results by gender, the UK was noticeably more likely to be chosen as a first-choice study destination by male survey respondents. Among those that said they were at least a little interested in studying abroad, 32 per cent of males said they would prefer to study in the UK, compared to only 23 per cent of females. The US was also more likely to be chosen by male students than by their female counterparts, while South Korea was almost twice as popular among female students as among males. EU destinations were also more likely to be preferred by girls, with no male students naming France or Germany as their top-choice destination.

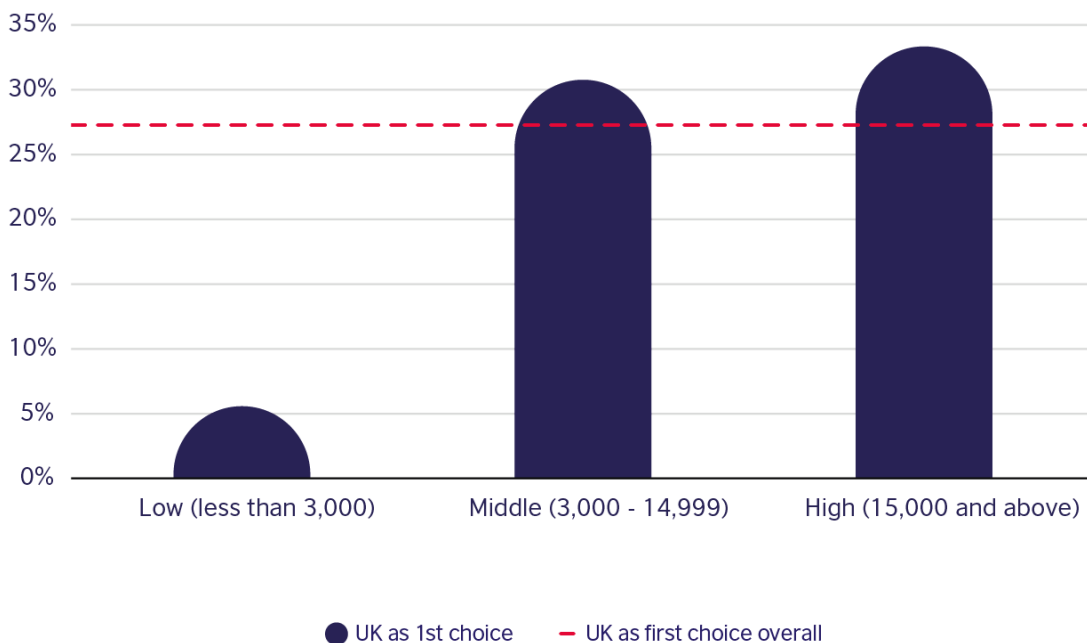
Figure 27: Students’ preferred countries for overseas study, by gender



Base: Students interested in studying overseas (121 respondents)

People’s economic situation also impacts their choice of study destination. While 18 students in the lowest income band – those with monthly household incomes below \$3,000 SGD per month – said that they were interested in studying abroad, only one of those said that the UK was their preferred study destination, compared to 31 per cent of respondents in the middle-income band and a third of those in the highest income group. In comparison China, France and Canada were comparatively more popular among students in lower income bands.

Figure 28: Students’ preference for studying in the UK by monthly household income



Base: Students interested in studying overseas (121 respondents)

Students' age or current level of study did not make a major difference to students' likelihood of preferring UK the UK, but there were some differences in preferences for other countries – most notably Australia, which was more likely to be preferred by current school students, while students already at university who were more likely than their school-age counterparts to name Canada or China.

In contrast to other ASEAN countries, the connections between the factors that students said were most important when choosing a country and their top choice of destination were relatively weak. Despite general agreement that the UK was a leading country in terms of high-quality education, survey respondents who named this among their most important factors were in fact slightly less likely than average to choose the UK as their preferred destination, while those who said that opportunities to work in a country after graduation had a slightly above average chance of choosing the UK even though the UK performed comparatively poorly in terms of perceptions of its strength in this area.

4.2 Interest in overseas travel

Singaporeans expressed strong interest in travelling abroad once the pandemic subsides. Focus group participants said that Covid-19 has not dampened their interest in overseas travel in the long run, or even in the shorter term as long as the requirements are fairly simple (such as masking and vaccination).

Singaporeans saw local attractions as the most important factor when deciding on an overseas travel destination, including places of interest, activities, scenery and the natural environment, and places like museums and art galleries. Friendliness and politeness of local people was also seen as important, along with a preference for places where they would not face language barriers, while several focus group participants also mentioned food as an important aspect of overseas travel.

Geographical proximity was comparatively more important for older age groups, who saw factors such as the flight duration and jet lag as important issues, while younger Singaporeans were more likely to say that the cost of travelling was important. Another factor mentioned by fewer people was weather, with the consensus being that places without harsh weather conditions – neither too hot nor too cold – were preferable.

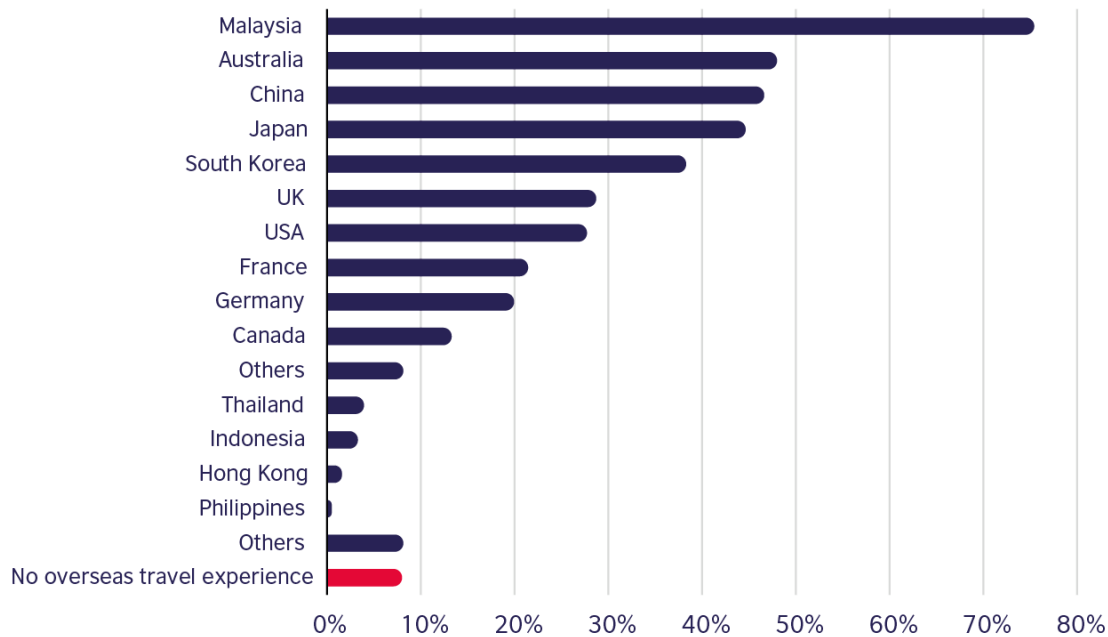
When talking about Western countries, Singaporeans said that major reasons to visit included shopping and experiencing a more relaxing lifestyle. European countries and Australia were preferred; the US was a less common destination due to the long flight times required. Most said that they would like to travel to the UK at least once in their lifetime, describing the country as welcoming and with a rich heritage.

Singapore's small size meant that almost all participants had travelled overseas – only 8 per cent of survey respondents had not been abroad with an average of 3.2 overseas trips in 2019.⁵ Neighbouring Malaysia was the most common destination, having been visited by three quarters of survey respondents, followed by Australia, China and Japan.

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

The UK was the 6th most popular destination, with 29 per cent of Singaporeans saying they had travelled to the country.

Figure 29: Previous travel experience by destination country



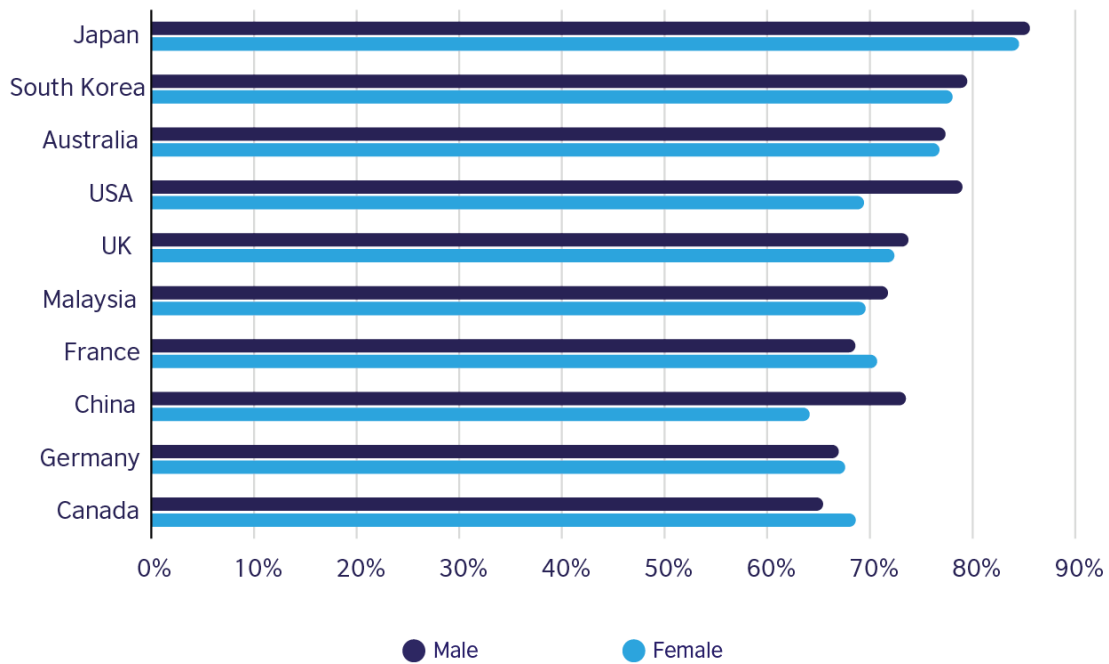
Base: All respondents in Singapore (1,400 respondents)

When asked about their attitudes towards travelling abroad in the future, Singaporeans had favourable attitudes towards visiting all of the ten countries included in the survey. However, Japan was the most preferred, with 85 per cent of survey respondents expressing interest in travelling to this country. South Korea was the second most preferred destination with 79 per cent of respondents wanting to go there.

The UK was 5th overall, with 73 per cent of respondents expressing interest, while even the least-preferred country in the survey, Canada, was seen as an attractive destination by more than two thirds of Singaporeans.

For most destinations including the UK there was very little difference between the attitudes of male and female Singaporeans. However, male survey respondents were significantly more likely to want to visit both the USA and China.

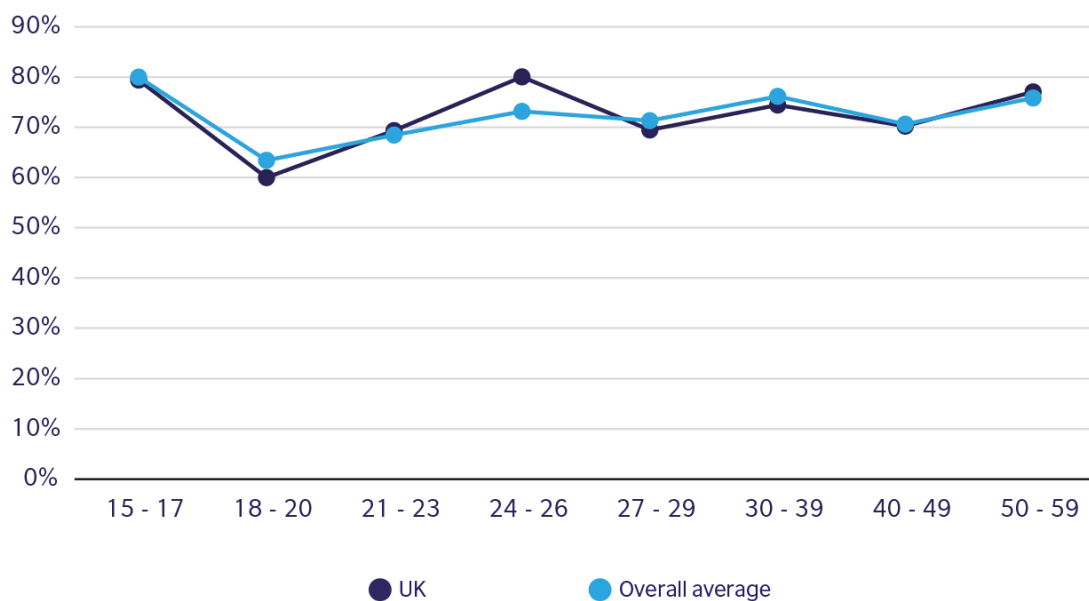
Figure 30: Interest in travelling to selected countries, by gender



Base: All respondents in Singapore (1,400 respondents)

The survey shows a slight trend towards increasing interest in overseas travel with age, although the youngest age group is an exception with 15–17-year-olds among the most likely to want to visit other countries. Comparing interest in UK travel to the overall interest across the 10 target countries there does not appear to be any major age-related gap in preference for the UK, although the gaps were larger for other countries – most notably for South Korea which was a much more popular travel destination for the younger generation than their parents.

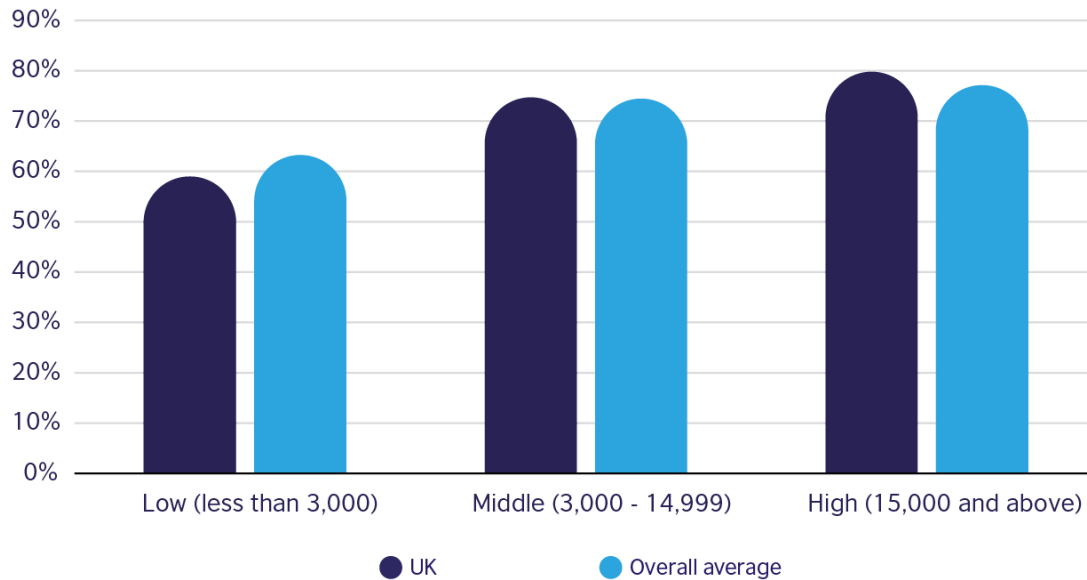
Figure 31: Interest in travelling to the UK, by age



Base: All respondents in Singapore (1,400 respondents)

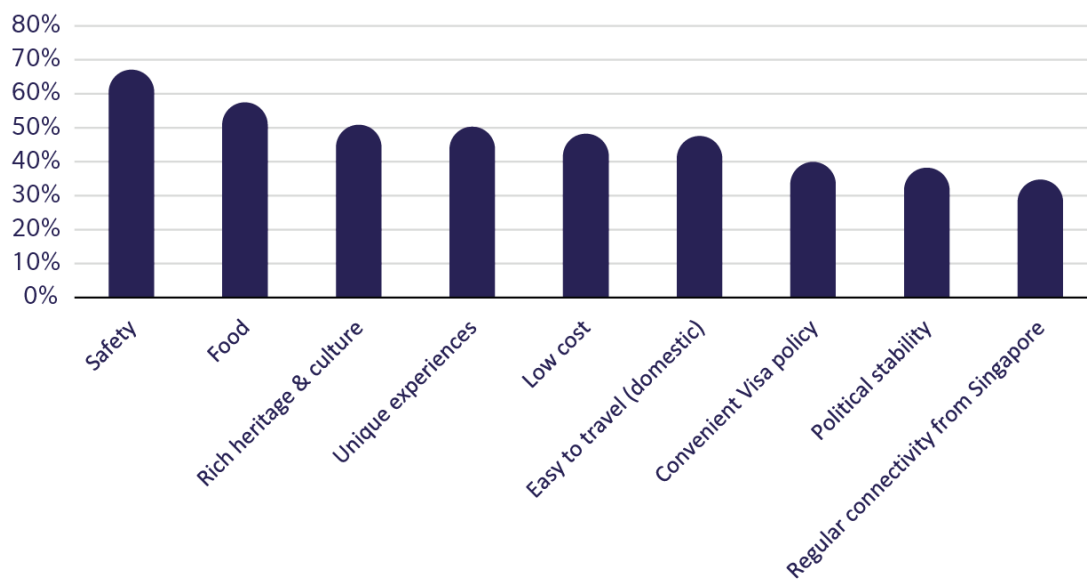
Interest in both overall overseas travel and travel to the UK is also strongly affected by income, with a clear increasing trend as people become wealthier. 80 per cent of Singaporeans in the wealthiest income group said that they were interested in travelling to the UK, compared to 59 per cent in the least wealthy group. This trend was slightly more pronounced than the average across all selected overseas destinations.

Figure 32: Interest in travelling to the UK, by monthly household income



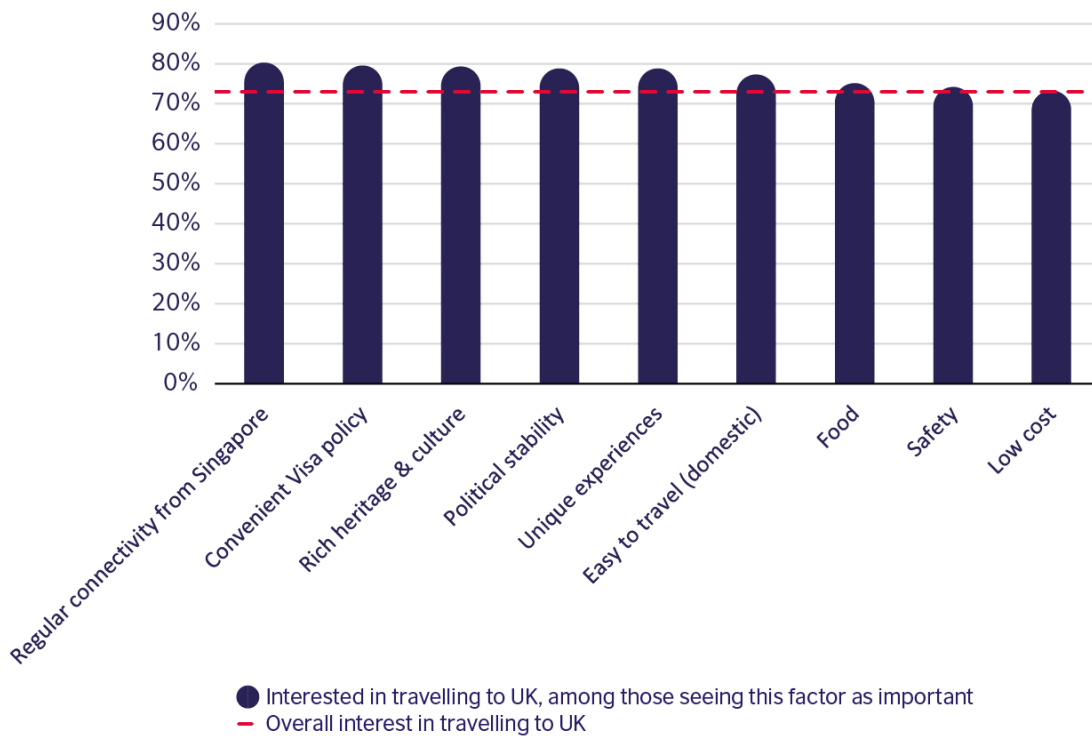
Base: All respondents in Singapore (1,400 respondents)

When survey respondents were asked about the important factors that determine the overseas countries they want to visit, the top result was safety which more than two thirds said was an important factor. Food was also seen as important by the majority of survey respondents, with around half mentioning a country's heritage and culture and unique travel experiences. Connectivity from Singapore and political stability were seen as the least important factors, described as important by 35 and 38 per cent of survey respondents respectively.

Figure 33: Important factors when deciding whether to travel to an overseas country

Base: All respondents in Singapore (1,400 respondents)

However, these factors mainly appear to have relatively little impact on Singaporeans' desire to travel to the UK or to other countries. Those who saw convenience in travel arrangements or visa requirements as an important factor were slightly more likely than the overall average to say that they wanted to visit the UK, along with those who valued a country's heritage and culture, political stability or the unique experiences of visiting the country, but the level of difference was relatively low overall and accounted for only a few percentage points.

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

Base: All respondents in Singapore (1,400 respondents)

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

4.3 Interest in overseas business, work and immigration

A high proportion of Singaporean survey responses said that they were interested in trade or doing business with overseas countries. The proportion for each country named in the survey ranged from ranging from 66 per cent for the US to 38 per cent for France, but these two countries were outliers at the top and bottom of the scale respectively; other countries fell in the range of 49 to 57 per cent. The UK was towards the bottom of this middle group, ranked 7th overall with 51 per cent of Singaporeans saying that they were interested in doing business with British people.

Despite the high level of interest expressed in the survey, focus groups showed that this interest was passive rather than active. Most focus group participants said that this question did not apply to them, as they were students or company employees rather than entrepreneurs, and even some of those whose work involved international trade said that decisions were made by their employer rather than themselves. Others said that interest in overseas business was driven mainly by their own industry's situation and potential business opportunities rather than interest in a specific country. However, most did feel that there might be potential business opportunities in the UK due partly to the country's strong international connections.

When asked about living abroad for a longer period the level of interest was also comparatively high – roughly between a third and a half of survey respondents agreed

that they would be interested in this, depending on the country in question, with the US at the top end of the scale followed by Australia and Canada. The UK again performed relatively poorly, with only 34 per cent of survey respondents saying they were interested in living there for an extended period (excluding overseas education courses).

Many younger Singaporeans in focus groups said that they were keen to live abroad in countries that present opportunities for work experience and progression in their career, though most do not want to live abroad long-term as they are rooted to their families in Singapore. Meanwhile older segments have more interest in moving abroad in retirement to countries with a slower pace of life. Focus group participants said that Covid-19 had no impact on long-term plans to live overseas.

When the prospects to live in the UK long-term, younger Singaporeans expressed interest due to a perception of better work opportunities, a lack of language barrier, diverse ethnicities and acceptable living standards. However, the country's cost of living is considered high – compared not only to nearby Asian countries but also to other Western countries such as Australia – while there were some concerns among Muslims about discrimination.

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



Base: All respondents in Singapore (1,400 respondents)

Interest in trade with all countries was strongly linked to gender, with male Singaporeans much more likely than females to say they were interested in doing business with people from almost all overseas countries. In the case of the UK, 58 per cent of males said that they were at least somewhat interested in doing business with British people compared to only 44 per cent of females, a gap of 14 percentage points. Male Singaporeans were also somewhat more likely than their female counterparts to say they wanted to live in the UK long-term, although the gap was smaller here at only 7 percentage points.

As with several other countries, focus groups in Singapore saw a country's stability as the most important factor both for doing business overseas or living there long-term, including both economic and political stability. For business the next most commonly mentioned factors were government policy and potential business opportunities, while those interested in living abroad long-term said that lifestyle and the cost of living were more important.

Survey results showed similar results. The most-named factor affecting interest in doing business was the ease of doing business in a country, followed by the country's stability and how cooperative the government is. A country's heritage and culture was seen as comparatively unimportant, with only 20 per cent of respondents saying that this was an important factor.

When talking about desire to work in a country the most important factors for Singaporeans were quality of life and salary levels, which were chosen by 63 and 62 per cent of respondents respectively. Career progression opportunities and safety were also important to relatively large numbers of respondents. Meanwhile when it comes to living abroad long term the top factors were safety and healthcare, both of which were much more popular choices than any other option.

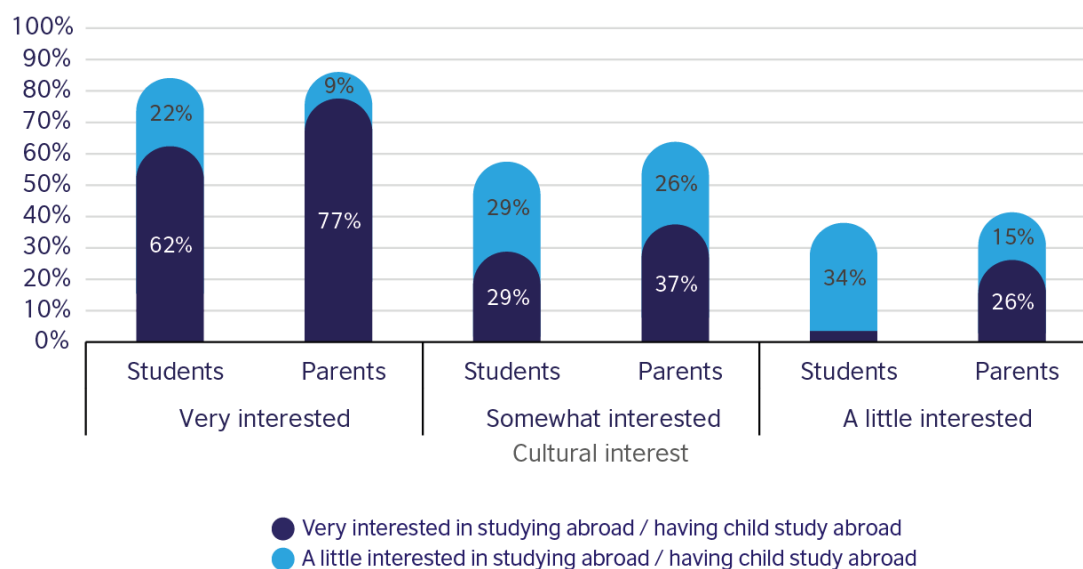
As with business cooperation, a country's culture was among the least important factors, mentioned by only a quarter of respondents talking about long-term residence and 23 per cent when discussing working abroad.

4.4 The link between cultural interest and overseas interaction

As with other ASEAN countries, research in Singapore found a strong connection between interest in overseas culture, as well as a strong link between attraction to a particular country and intention to study in that country.

Although interest in overseas culture was by no means the most important factor in students' decisions to study abroad, it nevertheless plays an important role. This is illustrated by survey results showing a direct connection between students' self-reported interest in overseas culture and their likelihood of saying that they are interested in studying overseas, as well as a similar connection between parents' interest in overseas culture and their desire for their child to study abroad.

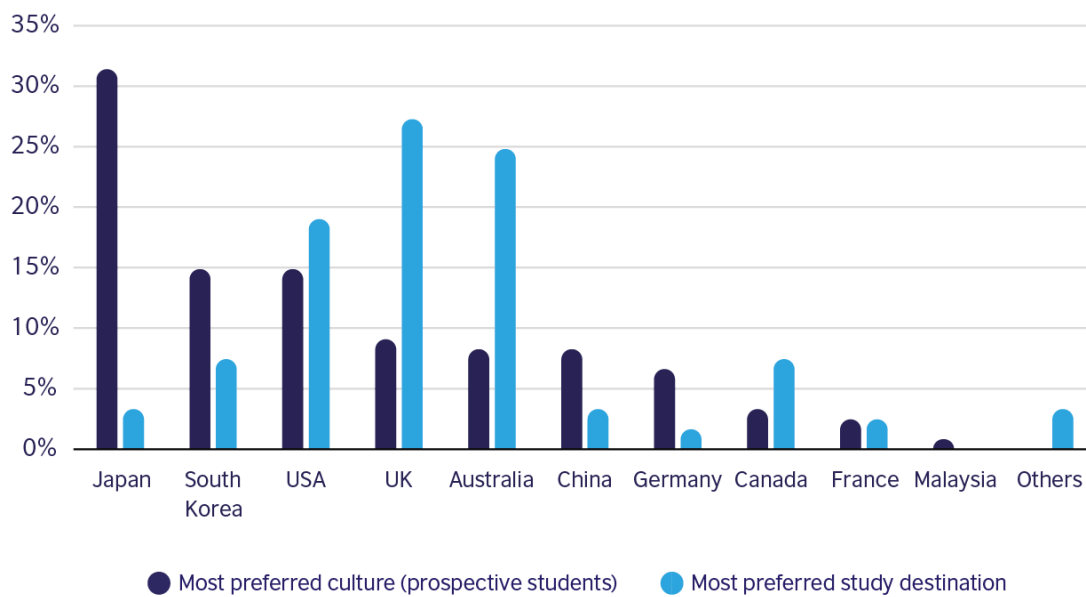
Overall, 84 per cent of students who described themselves as "very interested" in overseas culture said that they were at least somewhat interested in studying abroad, compared to 54 per cent of those describing themselves as "somewhat interested" and 37 per cent of those who said they were only "a little interested". Parents had a similar pattern, with 86 per cent of the "very interested" group expressing an interest in their child studying abroad compared to only 41 per cent of the "a little interested" group.

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

Base: Students (190 respondents) and parents (448 respondents)

Focus group findings confirmed that cultural interest and a desire to experience new cultures was an important factor in some students' decision to study abroad, but also showed that this was not the top factor for most students. Although the UK's culture and lifestyle were described as advantages by several students they saw this as secondary to directly education-related advantages – including overall education quality, teaching style and the esteem in which overseas universities are held by employers.

A comparison between students' top preferred countries in cultural terms and their preferred study destinations shows that there are substantial differences in the answers they gave to these questions. Among students who expressed an interest in studying abroad, almost a third named Japan as their preferred overseas culture but only 3 per cent named this country as their top study destination. In comparison the 27 per cent of students who named the UK as their most preferred destination was triple the proportion of these students who said the country was their favourite overseas country in terms of culture.

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

Base: Students interested in studying overseas (121 respondents)

When focus group participants were asked about the importance of culture in their overseas business cooperation, attitudes reflected the low importance placed on this by survey respondents. One respondent commented that *“I don’t think culture is the defining role”*, clarifying that *“it is all about profit, dollars and cents, how easy it is to do business, the rules and regulations, etc”*. Another participant commented that as an employee *“probably I have no choice and I have to go”*. Although some people saw culture as important, all saw it as less important than many other factors when it comes to doing business abroad.

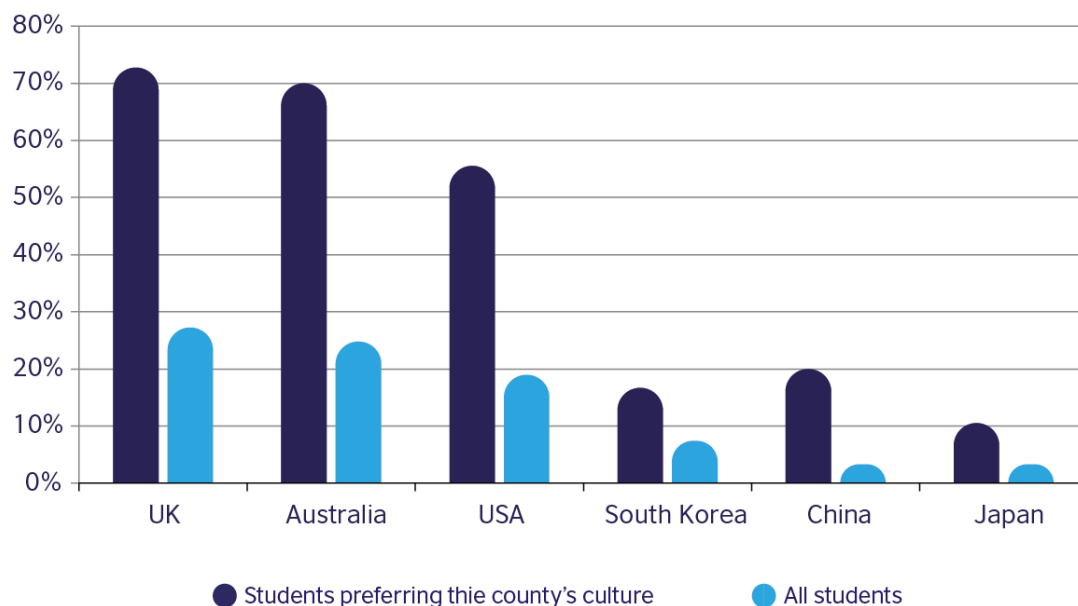
Singaporeans saw interest in a country’s culture as somewhat more important when it comes to tourism, with one focus group participant commenting that things like *“the country, culture, people, cuisines, religions”* were all important to their decision while others said that experiencing a country’s lifestyle or experiencing diverse cultures were major reasons to travel abroad. When talking about the UK, participants described the country’s heritage and the manners of British people as reasons to choose to visit the country.

Culture was also seen as a more important factor in decisions to live or work abroad for an extended period. One focus group participant commented that this was more important than for travel or study because of the length of time that they would be staying abroad – *“Travel or study is shorter. I can adapt, tweak and live with it then I come back. If I want to live abroad, I really have to think in-depth about it”*.

Although most prospective overseas students did not describe cultural interest as one of their most important decision factors when asked about this directly, analysing their answers to two of the survey’s questions suggests that factor does have a strong effect on their decisions. Among students that said they were at least somewhat interested in going on to future study abroad, slightly under 30 per cent said that the country they named as their favourite in terms of culture was also their preferred study destination.

While this proportion was lower than that for some other ASEAN countries, but still far higher than the result that would be expected by random chance.

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



Base: Students interested in studying overseas (121 respondents)

In the case of the UK, almost three quarters of the prospective students who said that this country's culture was the most attractive to them also planned to study in the UK, compared to only around a quarter of all prospective students. Other countries showed similar trends – for example only 3 per cent of all students said that Japan was their preferred destination, but the corresponding proportion among students who rated Japan's culture as the most attractive was 11 per cent.

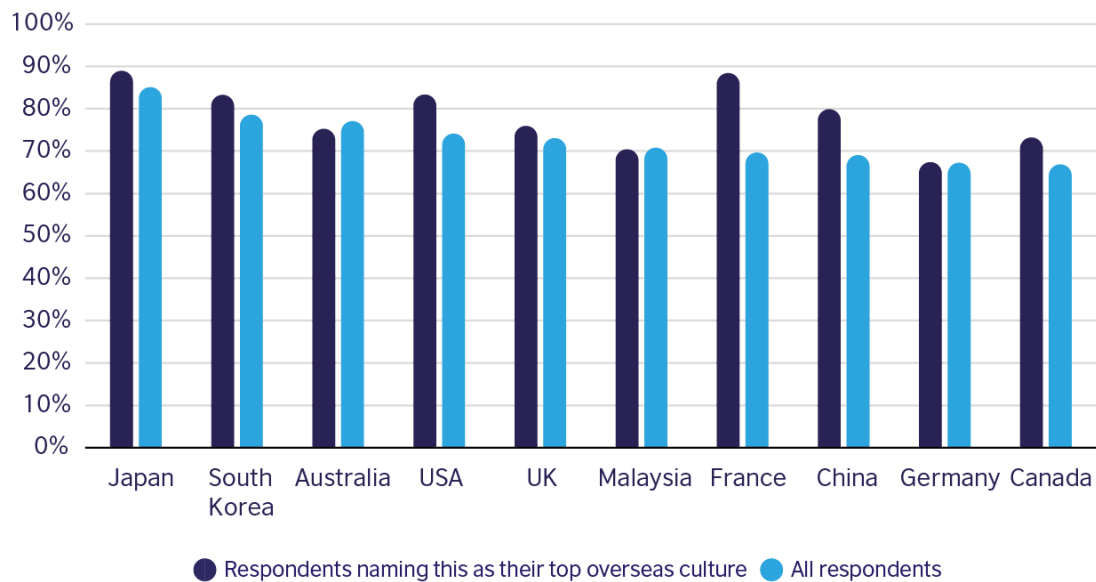
If study destinations beyond the first choice are also included, students preferring an overseas country's culture are even more likely to say they want to study there. Almost all of the 11 prospective overseas students that preferred UK culture named this among the study destinations they were interested in. A similar pattern applied to other countries – for example an overall total of 29 per cent of the prospective overseas students who named Japan as their favourite country also named this among the study destinations they were considering.

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 more than twice as likely to name that country as their first-choice study destination – a ratio almost as high as for students who said that culture was not something they consciously considered when choosing a country.

Results are somewhat less dramatic when it comes to the impact of cultural preference on tourism, perhaps because the proportion of Singaporeans interested in travelling to any given country was already very high. However, there is still a slight trend towards

higher interest in travelling to the countries individual survey respondents named as the ones they saw as most attractive in cultural terms. For example, 76 per cent of Singaporeans who named the UK as their top cultural preference said that they were interested in travelling to the country which is slightly higher than the overall 73 per cent proportion.

Figure 39: Interest in travelling to selected countries, overall and for Singaporeans preferring this country's culture

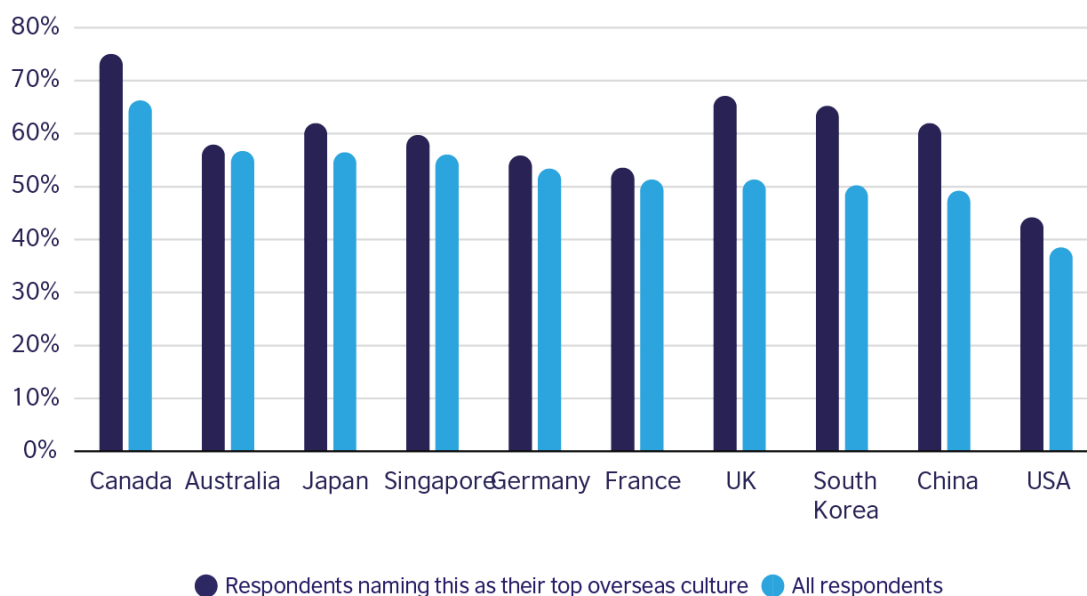


Base: All respondents in Singapore (1,400 respondents)

The same pattern held for seven of the 10 target countries, with the largest gap being for France which only 70 per cent of all respondents wanted to visit compared to 88 per cent of those who preferred the country's culture.

Interest in overseas business also shows a similar trend – while Singaporeans mainly described cultural interest as not being very important to their decisions, survey respondents' answers when asked about their interest in doing business with specific overseas countries did vary significantly based on whether they saw these countries' culture as attractive. The effect here was particularly strong for the UK, with 67 per cent of respondents that saw the UK as having the most interesting culture saying they would be interested in doing business with the country, compared to 53 per cent of all survey respondents. Other countries mainly had somewhat smaller gaps, but in all cases people who were attracted to a country's culture were more likely to want to do business with that country than those who were not.

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



Base: All respondents in Singapore (1,400 respondents)

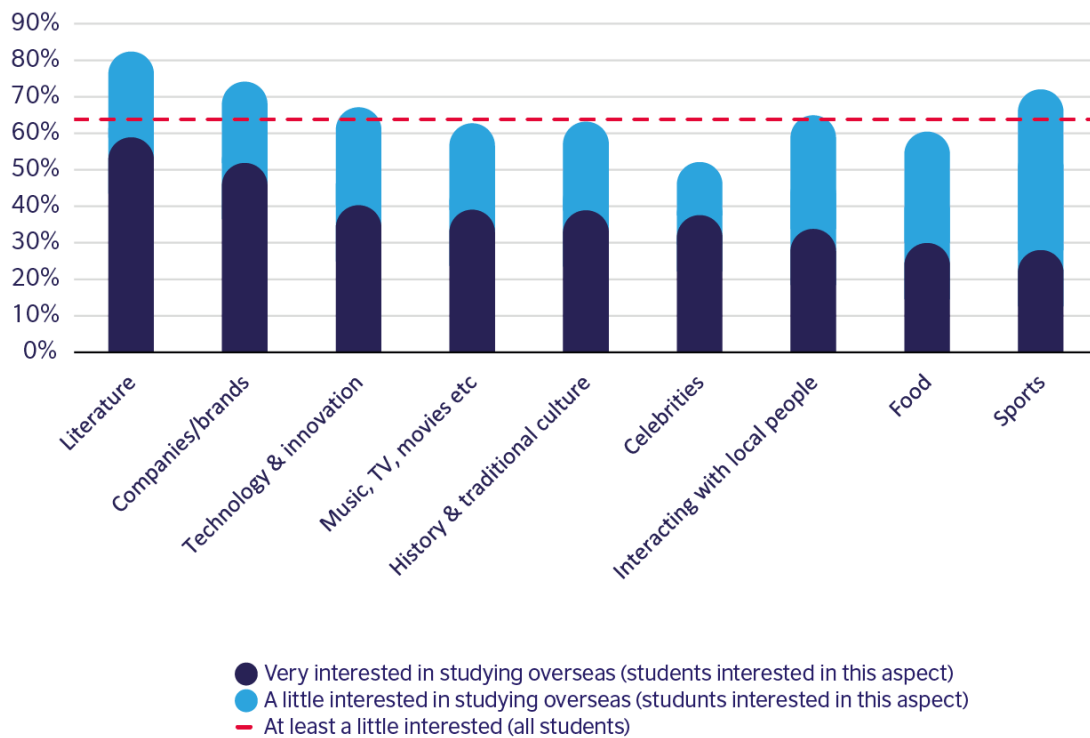
The gaps in interest in living in different countries long-term depending on cultural interest were substantially larger than those for business or tourism. In the case of the UK, 54 per cent of those that named the country as their preferred overseas culture said that they would be interested in living in the country long-term, compared to just over a third of the overall sample.⁶

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

The group of students who named literature among their top overseas cultural interests were the most likely to say they wanted to study overseas, with more than 80 per cent describing themselves as interested. However, it should be noted that this group was relatively small, with only 27 students describing themselves as interested in literature, so this group still only represents a small proportion of students wanting to study abroad.

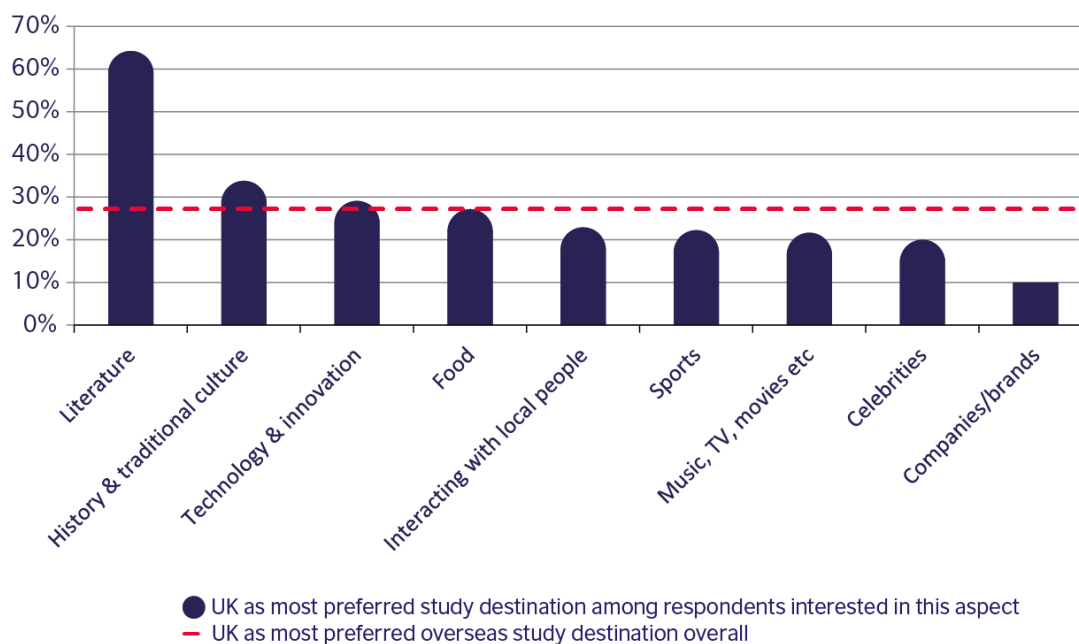
Among the elements of overseas culture that were more commonly named among students' interests, technology and innovation was associated with higher-than-average interest in studying abroad, while those that named food among the top three aspects were less likely than average to describe themselves as either very interested or a little interested in overseas study.

⁶ 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 (190 respondents)

Beyond students' overall choice of preferred overseas culture, attitudes towards specific aspects of overseas culture also has an impact on study destination preferences. The UK is particularly likely to be seen as an attractive study destination by students who have an interest in literature or in history and traditional culture, while the country is less likely to be chosen as the top destination by those more attracted to companies/brands, celebrities, or popular media such as films, music and TV. The higher interest among students interested in literature is unsurprising as this was named by many survey respondents as a UK strength.

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

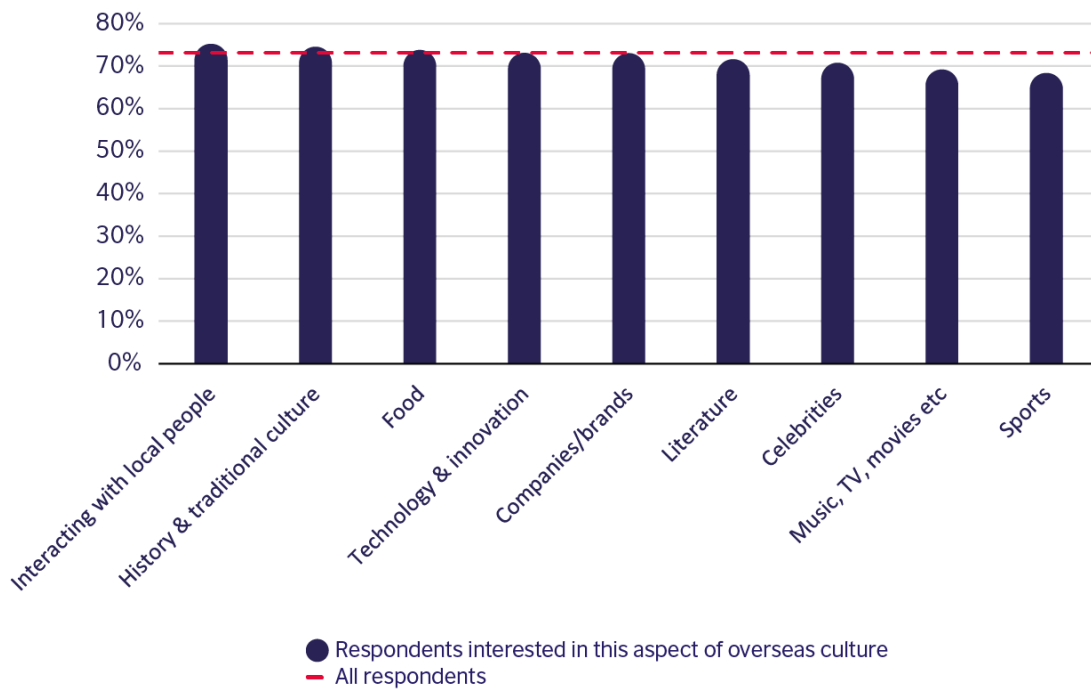
Base: Students interested in studying overseas (121 respondents)

Other countries show an even stronger pattern of differences by cultural interest. The most notable is Korea, which was chosen as the preferred overseas study destination for 16 per cent of students who named celebrities among their top overseas cultural interests – more than twice the proportion of the overall group that named Korea as their top study destination overall. Looking at other major study destinations, Australia performed the most strongly among those that named interacting with local people among their top cultural interests, while the US did well among those who named companies/brands and technology and innovation.

Beyond attitudes, there is also a strong connection between physical visits and interest in studying in a country. Dividing prospective students into people who have and have not visited the UK, 36 per cent of those who have visited named the country as their top overseas study destination, more than twice the proportion among those who had never been to the UK.

In comparison to education purposes there was relatively little variation in Singaporeans' interest in visiting the UK based on the aspects of overseas culture they are most interested in. The group with the highest proportion wanting to travel to the UK was those interested in interaction with local people, 75 per cent of whom wanted to visit the UK, compared to 68 per cent of those who named sports among their top overseas cultural interests and 69 per cent of those who named media such as music, TV and films.

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

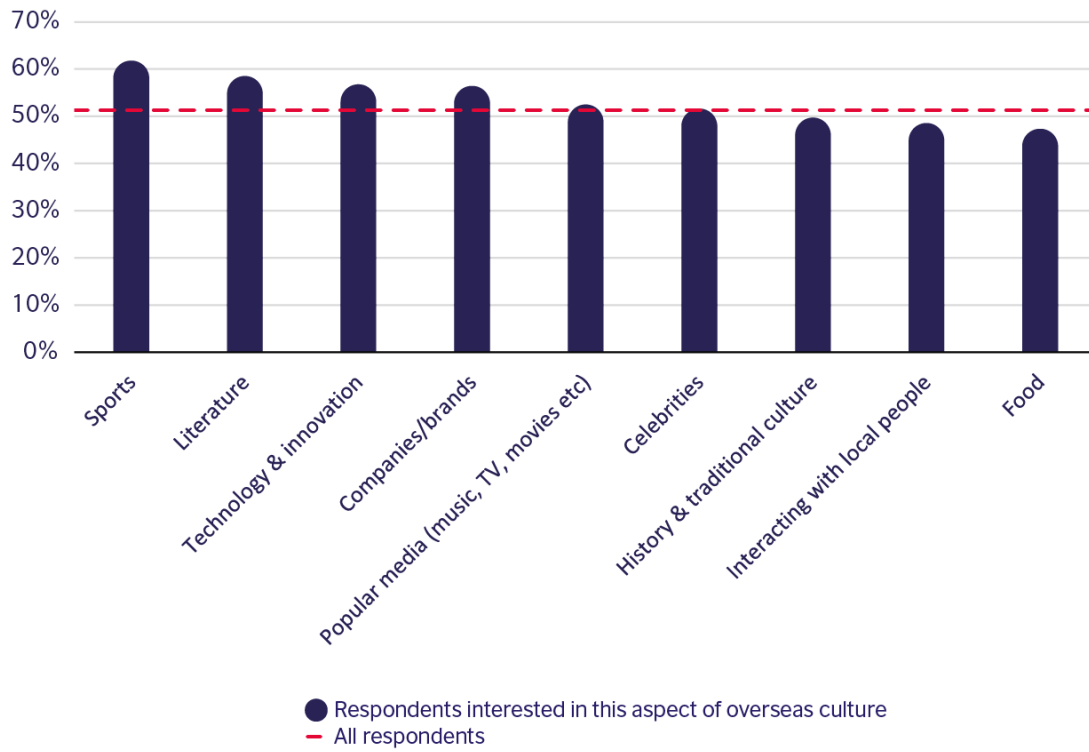


Base: All respondents in Singapore (1,400 respondents)

The impact here was stronger in some other countries. South Korea had a gap of 28 percentage points between its highest and lowest categories – 87 per cent of survey respondents who described themselves as interested in overseas media said they wanted to visit the country along with 83 per cent of those who said that overseas celebrities were among their top interests, vs only 59 per cent of people interested in literature.

Finally, interest in doing business with partners in the UK was also influenced by the aspects of overseas culture that survey respondents found attractive. Some of these factors seemed to have little connection to business – the group most likely to express this interest were people who named sports among their most interested cultural aspects, followed by literature, although people describing themselves as interested in companies and brands were also more likely than average. People who said that food was one of their top aspects of overseas culture were the least likely to want to do business with UK partners.

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



Base: All respondents in Singapore (1,400 respondents)

5. CONCLUSIONS

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

As with other ASEAN countries, research in Singapore showed that the UK performed much more strongly in the field of education than in terms of overall cultural interest. Focus group participants, social media discussion and survey results all showed that the UK was Singaporeans' top choice as an overseas higher education destination, with the country's advantages coming from both its strong position in world university rankings as well as historical connections to Singapore.

In contrast, the UK was seen as less competitive in other areas such as media or technology. Focus group participants and survey respondents said that they associated other countries more strongly with entertainment content, while the UK's strengths were seen as being more connected to the country's past than to technological innovation.

Although most Singaporeans do not see cultural interest as one of the most important factors when it comes to education or international trade, their relatively low level of cultural interest in the UK could still have an impact on this type of interaction with the country. Research conducted for this report shows that there is a strong connection between cultural attitudes towards different overseas countries and attitudes towards visiting, studying in and doing business with them, both for Singaporeans and their counterparts elsewhere in the ASEAN region.

For education this connection results in students who named the UK as their preferred overseas culture being almost three times as likely to choose the country as their preferred overseas study destination – a connection which is almost as strong for those that said that cultural interest did not play a major role in their decision as for those who saw this as an important factor. Similarly, people who preferred UK culture were more likely to express an interest in doing 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.

As noted several times in this report, the questions on overseas study intentions discussed in this report only reflect the initial stage of potential students' decision process. Focus group research shows that once students start to seriously engage with overseas university applications there are many other factors they take into account beyond their initial level of interest, and the true proportion of Singaporean students going abroad is far lower than the 64 per cent who expressed an interest in this in the survey. The proportion of Singaporeans who would realistically be likely to engage in trade or business with the UK is likely also substantially lower than the proportion of survey respondents who expressed interest in this.

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