



Measuring the cultural dividend

How does interest in overseas culture
affect Thai 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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CONTENTS

1. Executive Summary	6
2. Introduction and Methodology.....	8
3. Thai people’s interest in overseas culture.....	10
3.1 Level of interest in overseas culture	10
3.2 Factors affecting interest in overseas culture.....	13
3.3 Interest in specific overseas countries’ culture	17
3.4 Strengths and weaknesses of different overseas countries.....	23
3.5 Perceptions of people from different countries.....	26
3.6 Factors affecting interest in different countries.....	27
4. The effect of cultural interest on interaction with overseas countries	31
4.1 Interest in overseas education.....	31
4.2 Interest in overseas travel	41
4.3 Interest in overseas business, work and immigration.....	46
4.4 The link between cultural interest and overseas interaction	48
5. Conclusions	57

1. EXECUTIVE SUMMARY

- This report analyses the link between Thai 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.
- Interest in overseas culture was somewhat lower in Thailand than in other ASEAN countries, with only 35 per cent describing themselves as "very interested" in overseas culture. Thais' change in attitudes towards overseas culture over the previous 12 months was also the most negative among all target countries. However the level of interest was still high in absolute terms, with around three quarters describing themselves as at least somewhat interested. The aspects of overseas culture that Thais are most likely to be interested in included food, technology and innovation, and history and traditional culture.
- Female Thais were somewhat more likely to describe themselves as interested in overseas culture than their male counterparts, although their level of interest was still lower than in other parts of the ASEAN region. Wealth also has a strong effect, with those with monthly household incomes of 60,000 THB or above being almost twice as likely to describe themselves as "very interested" compared to the lowest-income group of survey respondents.
- Beyond Thais' interest in overseas culture as a whole, interest in the UK specifically is relatively low. Only 5 per cent of survey respondents named the UK as their preferred overseas country in terms of culture, ranking 6th overall among 11 countries. In contrast Japan was by far the most popular overseas country, with almost half of respondents rating it as the most attractive in cultural terms.
- In general Thai people have relatively little knowledge of UK culture, and the country is less prominent in their minds than some other overseas countries. The general perception is that the country is broadly similar to other Western countries and was not particularly outstanding in terms of entertainment media or technology, although people did mention the UK's strength in literature and the Premier League and British accents were regarded as signifying high status.
- Thais' interest in overseas study was lower than in other ASEAN countries but still very positive in absolute terms – a little over a third of students said that they were "very interested" in overseas study while a further quarter were at least a little interested. Female students were relatively more interested than their male counterparts, but in contrast to most other countries the survey results in Thailand did not show a strong connection between income level and interest in overseas study.
- The proportion of Thai student survey respondents describing themselves as interested in studying overseas is far higher than the proportion who actually go

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

- The UK performs more strongly in terms of overseas study intention than overall cultural interest but is still only described as the first-choice study destination for around one in ten Thai survey respondents that say they want to study overseas. This places the country fifth behind the US, Japan, Korea and China. Opinions were more positive among people who were actively engaged with overseas study preparations, showing that the UK's overall attractiveness is stronger than the country's initial image among Thai students and their parents more broadly.
- 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.
- Thais expressed strong interest in travelling abroad in the future and did not foresee Covid-19 having a major impact on their travel once the pandemic subsides. A large majority described themselves as potentially interested in visiting the UK, although survey respondents said the same about other countries and the UK was less popular than nearby East Asian countries. Almost half of Thai survey respondents said they wanted to do business with UK partners and a little over a quarter expressed interest in living and working in the UK for an extended period – although as with overseas study these responses are likely reflecting a broad initial potential interest rather than actual serious plans to do so.
- As with study preferences, interest in travel, overseas business and living and working abroad is linked to cultural attitudes. People with more interest in overseas culture were more likely to want to engage in those forms of international interaction, while a preference for UK culture is also linked to a higher likelihood of wanting to engage with the UK specifically.
- The link between interest in a country's culture and preference for studying in that country means that Thai people's low level of interest in UK culture is likely affecting attitudes towards UK study in a negative way. Higher preference for the UK as a destination among people preparing to study overseas shows that the UK's favourability rises as people pay more attention to overseas study, while interest in studying in some other countries falls off as students look into overseas study options in more depth. However, this initial interest still has an important effect in determining study destinations, so greater visibility of UK culture would likely have a positive effect on attitudes towards UK study, as well as other forms of interaction such as travel and business cooperation.

2. INTRODUCTION AND METHODOLOGY

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

When overseas students are asked about their intentions to study abroad and the process of choosing a country to study in, they often name cultural interest in the destination as one of their most important decision factors. Cultural interest is also often described as important for other forms of interaction with overseas countries such as tourism or business cooperation. 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.

This 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 Thai 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 26,391 posts – slightly over half 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 Thais and were further weighted to reflect the country's demographics, taking into account factors such as gender, age and region. A total of 2,200 responses were received in Thailand, as part of a total of 13,200 responses across all six target ASEAN countries.

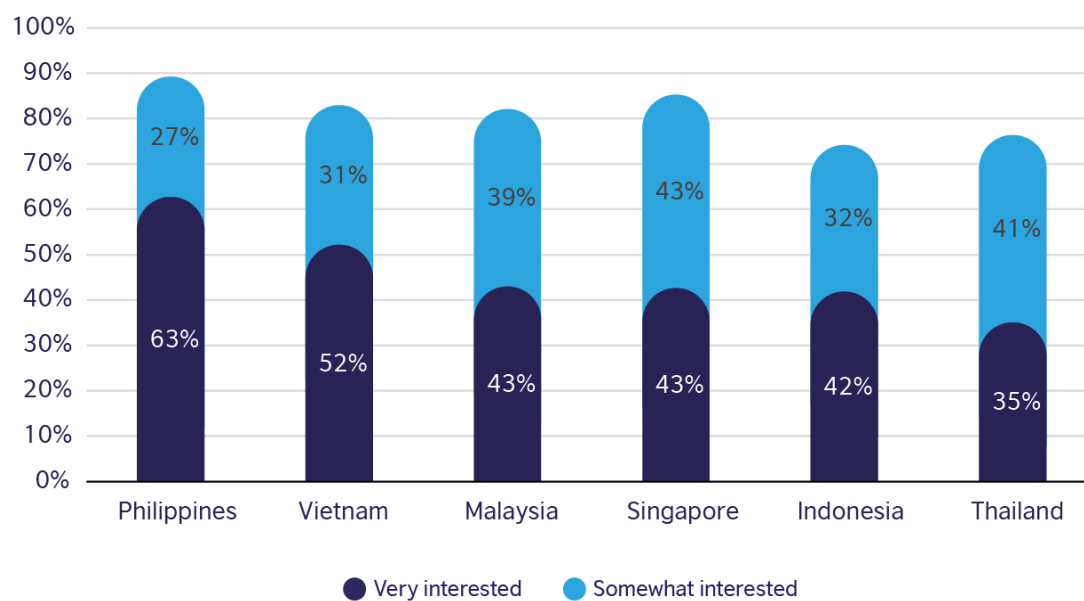
Four separate focus groups were conducted online with Thai participants in late January 2021.

3. THAI INTEREST IN OVERSEAS CULTURE

3.1 Level of interest in overseas culture

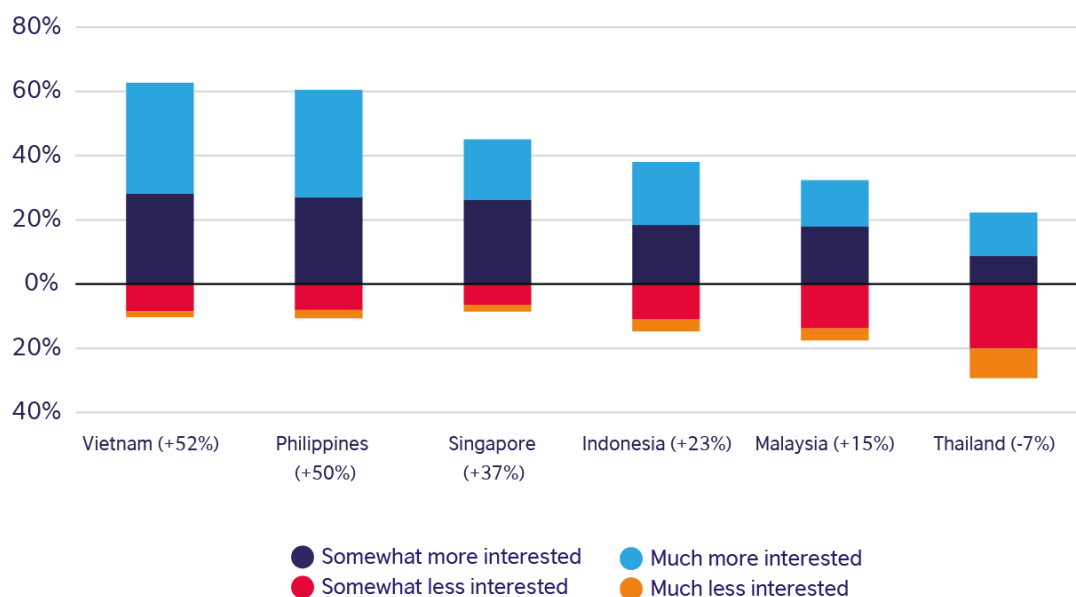
While Thai people were less likely to express an interest in overseas culture than their counterparts in other ASEAN countries, a relatively high proportion still described themselves as interested in overseas culture and interacting with overseas countries. Overall, 35 per cent of Thai respondents described themselves as “very interested” when they were asked a broad question about their level of interest in overseas culture, while 76 per cent described themselves as at least “somewhat interested”.

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



Base: All respondents (2,200 respondents in Thailand / 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. Thailand was the only country in the ASEAN region where net results were negative overall – 29 per cent described themselves as having become less interested in overseas culture over the last year, compared to 22 per cent who said their interest had increased.

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

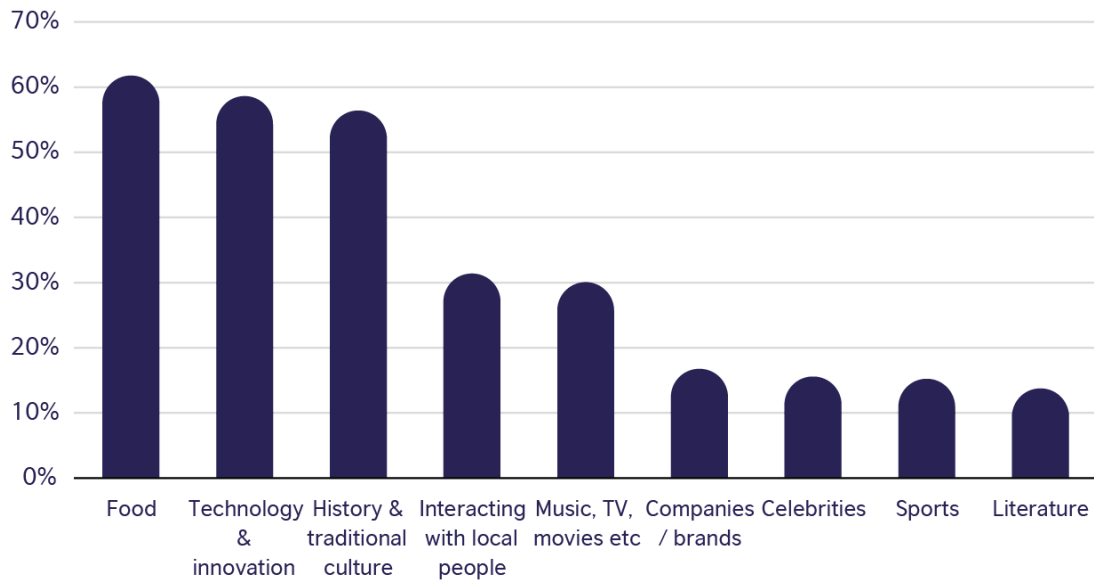
Base: All respondents (2,200 respondents in Thailand / 13,200 respondents total)

Four focus group discussions were held in Thailand, involving groups of prospective overseas students, parents of students considering overseas study, returned overseas graduates and a broader selection of young people. The things that participants in these groups associated most strongly with “overseas culture” related to the traditions and heritage of people from overseas countries, including religion, family tradition and festivals as well as historical architecture and buildings. They also saw culture as strongly related to lifestyle-related issues such as people’s values, norms and attitudes, while social behaviour such as the way people treat others was also mentioned as something associated with culture.

People in Thailand mentioned a variety of places when asked about countries they associated with culture, with no one country particularly standing out – including China, Japan, the Netherlands, Portugal, and Thailand itself. However, when asked later about the most attractive countries in cultural terms there was a greater degree of consensus as described in later sections of this report.

When asked about the aspects of overseas culture they found most interesting, the most common responses among Thai people were food, technology and innovation and history and traditional culture. These three responses were all substantially more common than interaction with local people and popular media such as music, TV and movies; in turn these two factors were more likely to be named than literature, sports, celebrities or companies / brands.

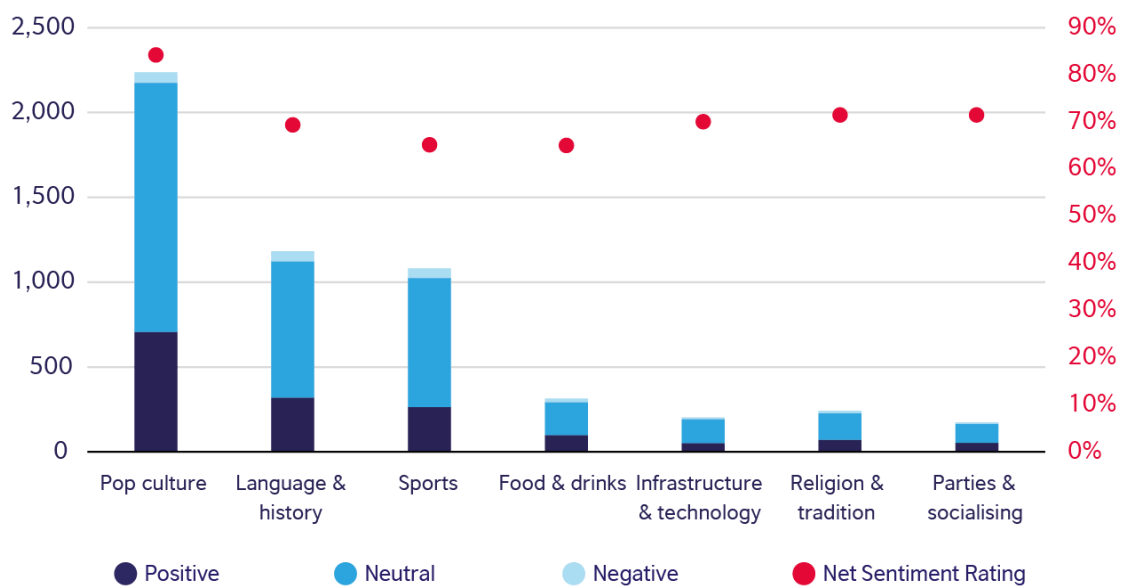
Figure 3: Interest in different aspects of overseas culture



Base: All respondents in Thailand (2,200 respondents)

While popular culture was only mentioned as a preferred aspect by around a third of survey respondents, social media discussion of three major overseas countries – including the UK, the US and China – showed a comparatively greater amount of discussion of this topic. Posts discussing this subject made up by far the largest share of all discussion tagged as related to overseas culture and mentioning one of these three countries. Meanwhile posts identified as discussing language and history or sports were also comparatively common compared to other aspects of overseas culture.

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



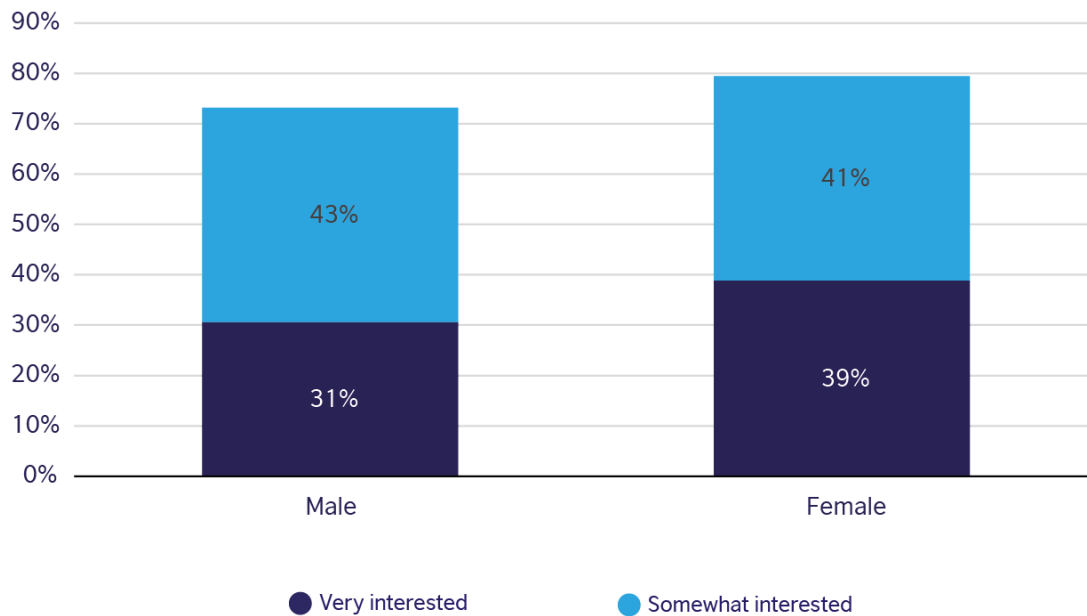
Base: Social media posts discussing the UK, US or China in terms of culture, June 2019 – March 2021

Analysis of the sentiment of these posts shows that discussion of overseas countries' popular culture was also the most positive, with a 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 – of over 80 per cent. More detail on attitudes towards specific countries' culture can be found in Section 3.3.

3.2 Factors affecting interest in overseas culture

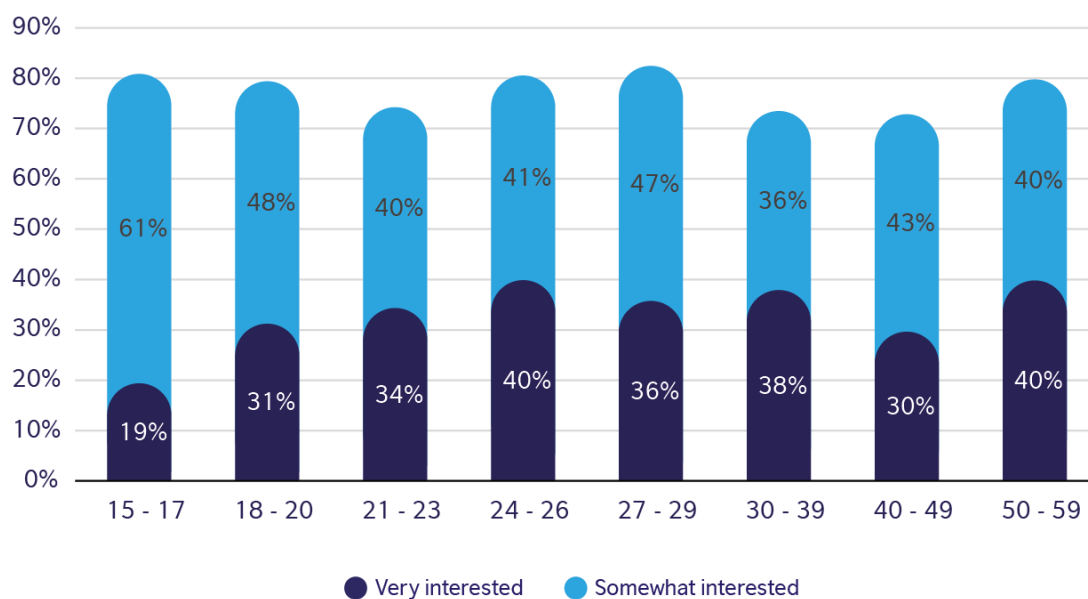
A comparison of male and female survey respondents shows a significant difference in the two genders. 39 per cent of Thai women and girls described themselves as “very interested” in overseas culture, compared to only 31 per cent of male survey respondents in the country. There was a similar gap in the proportion describing themselves as at least “somewhat interested”.

Figure 5: Interest in overseas culture by gender



Base: All respondents in Thailand (2,200 respondents)

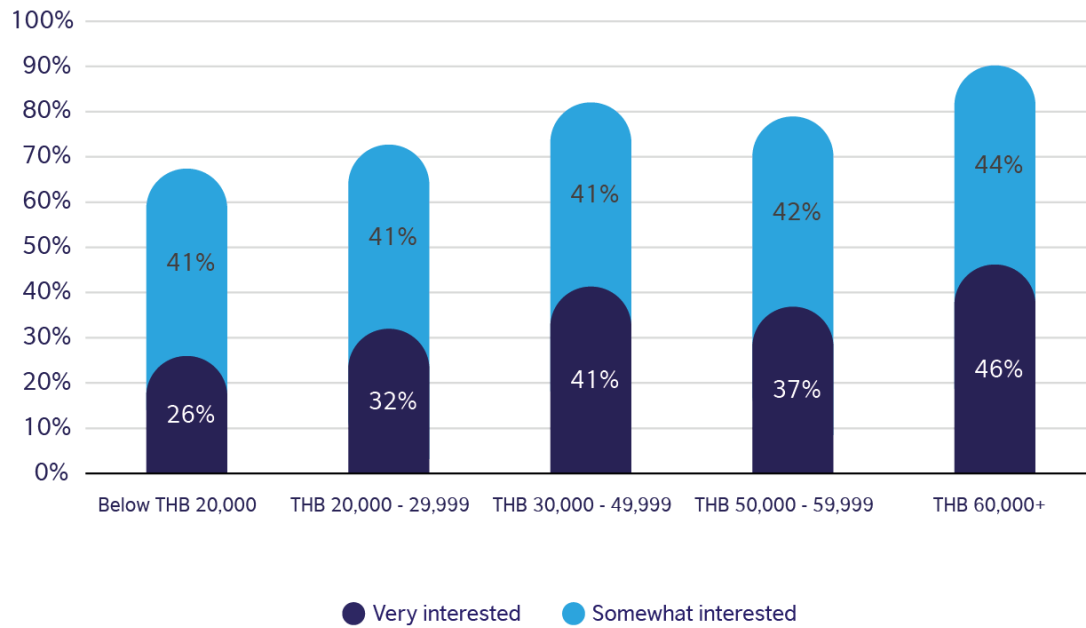
Analysing the data by age, the trend was less consistent. The overall level of interest in older age groups was higher than that among Thais in their early 20s and below, but there was no clear trend within these older age bands – people aged 24-26 and those aged 50+ were equally likely to express an interest in overseas culture. However, student or non-student status did not appear to have a substantial effect on interest in overseas culture.

Figure 6: Interest in overseas culture by age

Base: All respondents in Thailand (2,200 respondents)

Dividing survey respondents by region, Thailand was somewhat unusual among ASEAN countries. In most countries in the region, people living in the capital were more likely to express an interest in overseas culture; however, in Thailand the level of interest in Bangkok was slightly below the national average while people living in the Northeast of the country were the most likely to describe themselves as very interested in overseas culture.

A stronger indicator of interest in overseas culture is household income, with wealthier groups generally being more likely to describe themselves as very or somewhat interested in overseas culture. The wealthiest group, people from households earning at least THB 60,000 (£1,300) per month, had the highest level of interest – 46 per cent described themselves as very interested in overseas culture, with a total of 90 per cent saying they were at least somewhat interested. Meanwhile the least wealthy group, with monthly household incomes below THB 20,000 (£450), were the least interested in overseas culture; around a quarter of this group said they were very interested in overseas culture.

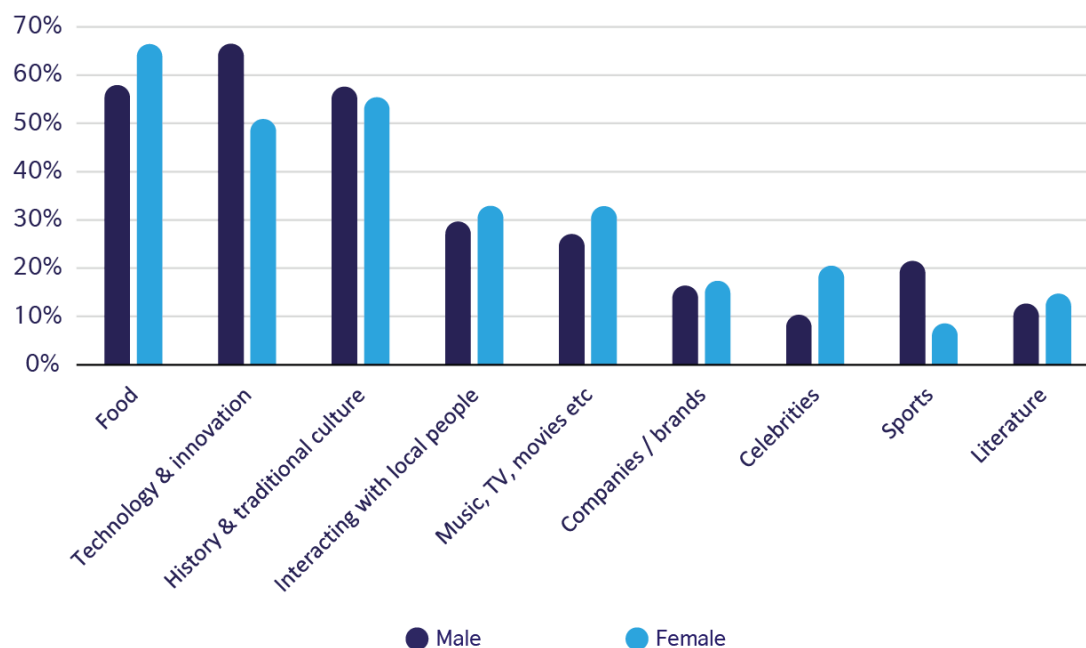
Figure 8: Interest in overseas culture by monthly household income

Base: All respondents in Thailand (2,200 respondents)

As noted in the previous section, survey participants were also asked about the extent to which their attitudes towards overseas culture had changed over the last year.¹ Male respondents answered in the most negative way, with 30 per cent saying that their interest had decreased since the beginning of the Covid-19 pandemic, while Thai women and girls roughly equally likely to say that their interest had increased or decreased. There were no consistent trends by age group or income.

Looking at interest in different aspects of overseas culture, the level of interest in some of these aspects varies significantly by gender. Male respondents were twice as likely as females to name sports among their top three aspects of overseas culture, while the opposite trend applied to interest in celebrities which were among the top aspects for 20 per cent of female respondents but just 10 per cent of males. The largest gap overall was in innovation and technology, which was among the top aspects of overseas culture for 66 per cent of males compared to 51 per cent of females.

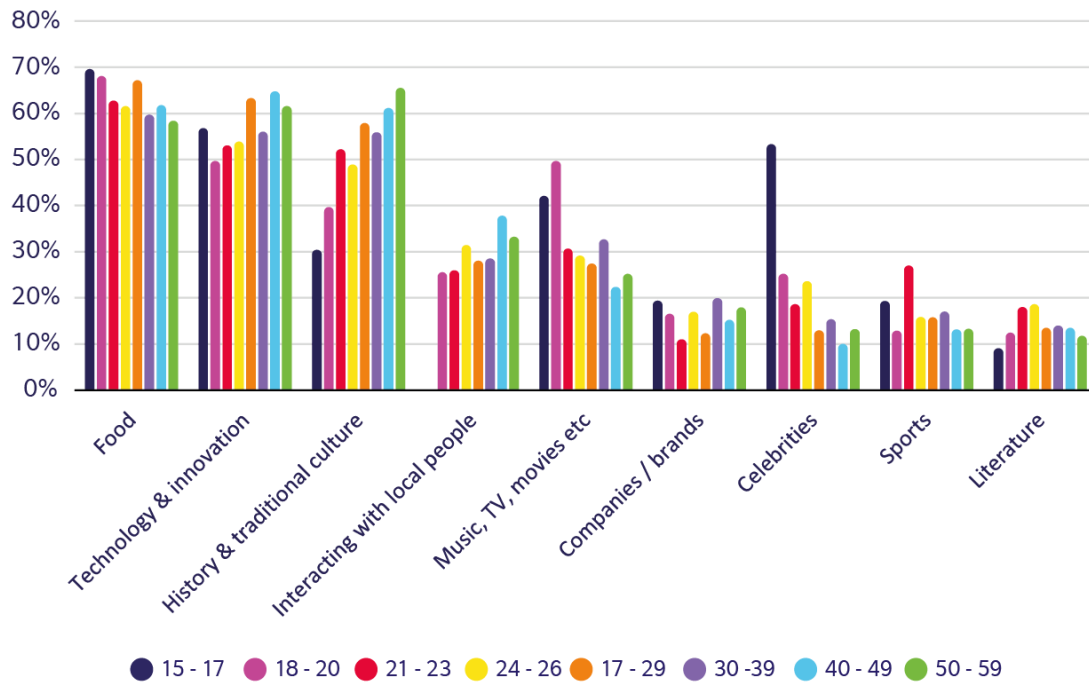
¹ As noted in previous sections, the survey was conducted in early 2021

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

Base: All respondents in Thailand (2,200 respondents)

A comparison across age groups shows that history and traditional culture is substantially more attractive to older Thai people, while popular culture such as music, TV and movies is relatively more popular among younger age groups. Celebrities were particularly attractive to the youngest group of survey respondents (ages 15-17) while being less interesting as people grew older.

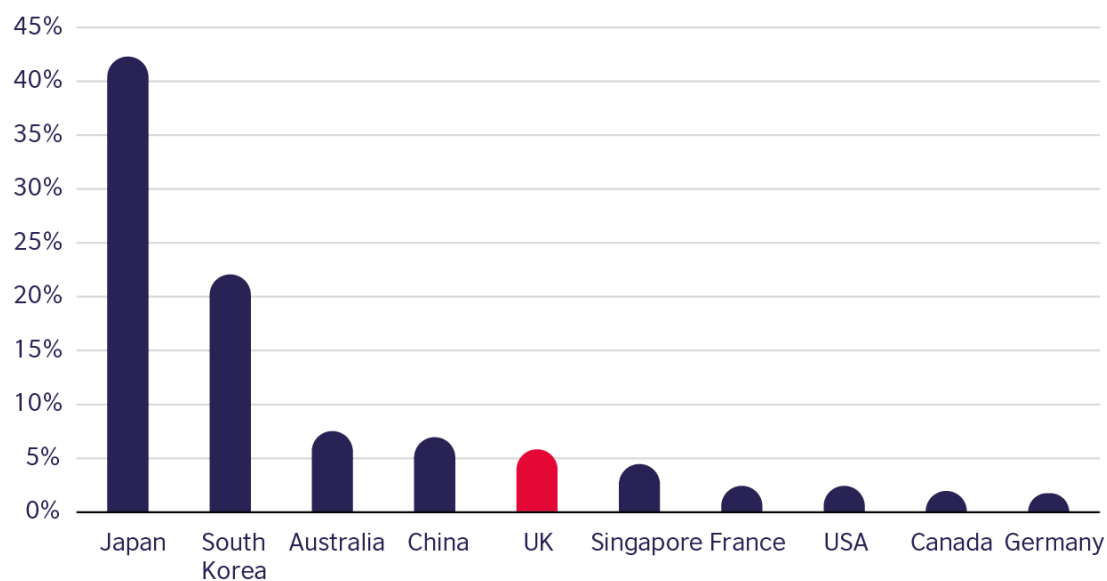
Figure 10: Interest in different aspects of overseas culture by age



Base: All respondents in Thailand (2,200 respondents)

3.3 Interest in specific overseas countries' culture

As in other ASEAN countries, Japan was the clear leader when Thais were asked to name their preferred overseas country in terms of culture. 45 per cent of survey respondents who said they were interested or very interested in overseas culture said that this was the country they saw as most interesting in cultural terms, far more than any other country. South Korea and China, the next most popular countries, were each named as favourites by less than a third of the number of people who chose Japan. The UK was in 6th place with a five per cent share of respondents.

Figure 11: Preferred overseas country in terms of culture

Base: Respondents at least somewhat interested in overseas culture (1,690 respondents)

These survey results were in line with comments from focus groups in Thailand. Japan was the most-mentioned country when participants were asked about the most attractive overseas culture, with people praising the country for being modern and developed but maintaining its original identity by keeping their traditions alive. Japanese people were described as “friendly, calm, punctual, and well-disciplined”.

Australia and New Zealand were also mentioned as having an attractive culture, with people focusing on the lifestyles of people in these countries. They saw people from these countries as maintaining a strong work-life balance but still maintaining strong development and financial stability. Australia was also described as having a “sense of familiarity” due to its large Asian community and relatively close location.

China was also seen as culturally attractive across a range of characteristics, being described as maintaining its traditions while also encouraging modern development. People who had visited China commented on the convenience of apps such as Eleme for food delivery and Taobao for online shopping, as well as praising the public transport options available in Chinese cities. China was described – along with Korea and Japan – as an “engineering country” that develops its own technology rather than purchasing from other countries, and the country’s strength was attributed to its people being self-disciplined and working hard to achieve success.

South Korea was particularly popular among young people, being mainly attractive for its entertainment content such as TV dramas and K-pop. The success of other aspects of Korean culture was seen as being related to this – one participant summed this up by saying that “*they are very successful because the world knows about them via their entertainment*”, while others agreed that their positive attitudes towards Korea were influenced by Korean entertainment content. As well as being attractive to watch, Korean dramas were seen as more socially responsible than Thai content, for example in

terms of gender relations. Aside from entertainment, Koreans also had positive attitudes towards Korean brands and technology.

Some focus group participants commented that the popularity of Korean entertainment had been driven by the country's government, which supports content that promotes Korean culture, or that this popularity was due to a "massive PR effort" and advertisements. Others noted that the country's media was particularly prominent on social media.

"European countries" were also described as having attractive culture, including more open mindsets and an open attitude towards accepting new people, as well as being developed countries with good quality of life but being "not too stressful". The UK was seen as one such country, as were Germany, Portugal, the Netherlands, Switzerland; Canada was also noted as having a similar "European lifestyle" despite its location.

The US was not initially named as one of the countries with an attractive culture, but when Thais were asked about various specific aspects of overseas culture the country was described as among the most attractive in almost all areas. In terms of lifestyle the US was seen as giving greater freedom, although this was contrasted against a "low sense of community" exemplified by reluctance to wear masks during the Covid-19 pandemic. The US was also praised for its technological development, described as having "*many kinds of technologies with large production capacity, R&D and budget*" and for taking risks in investing in new technologies that had led to innovations such as the Internet. Meanwhile Thais had high exposure to popular media, both through cinemas and via online platforms such as YouTube and Netflix; as with South Korea, media from the US was seen as being very popular among young people but older participants generally tended to be more interested in local Thai content.

Alongside foreign countries, focus group participants also mentioned their appreciation for their own Thai culture. They described Thailand as having a good lifestyle and living environment along with a low cost of living, and Thai people as respecting traditions and balancing traditional and modern activities.

The UK was generally less prominent in Thai people's minds than the most popular overseas countries. As described above, the country was mentioned alongside other nearby countries when talking about countries with a "European lifestyle", but some felt that British people were more individualistic and "more snobbish" than people from European countries.

When specifically asked about their perceptions of the UK, the level of awareness was relatively low and the country was generally seen as similar to other Western countries. For example, they had relatively little exposure to British media, while UK technology "*can compete with others [...] but it's not the top compared to like China and US*".

There were three other strong associations with the UK. One was of high quality education, with long-established and world-famous universities; attitudes towards overseas education are discussed in more detail in Section 4. Meanwhile the UK was also known for the Premier League, with focus group participants saying that "*everyone*

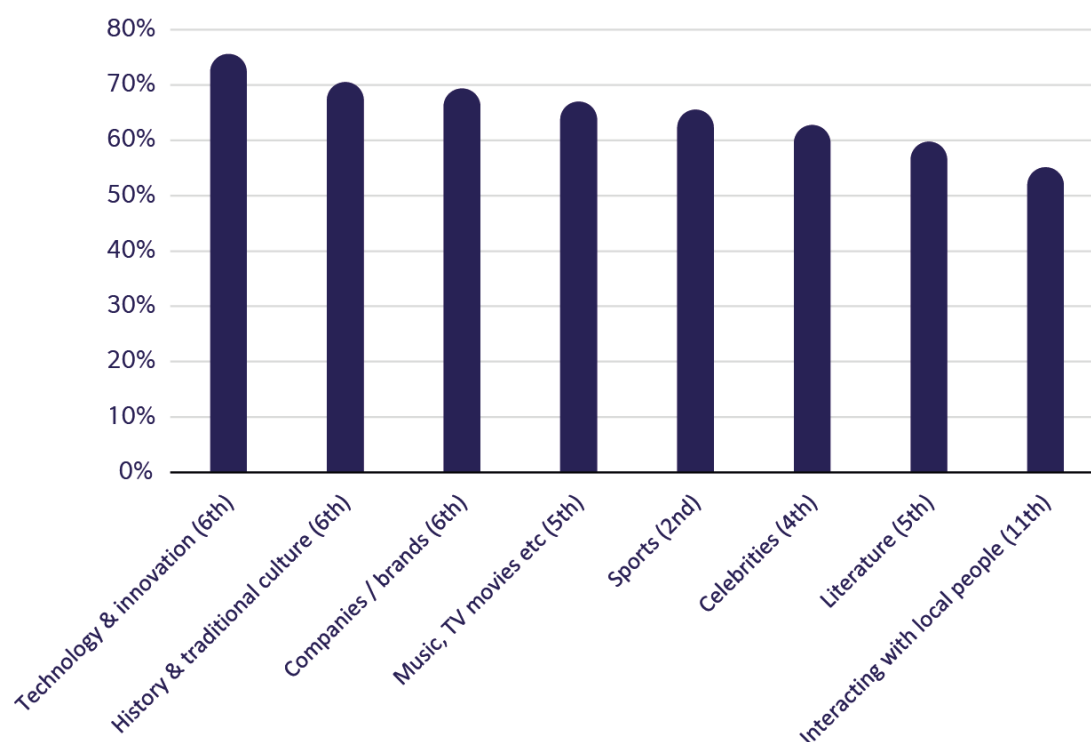
knows the EPL". Finally, multiple focus group participants said that the British accent "sounds superior" to American English, and would be better regarded.

When Thais were asked about countries' attractiveness in terms of specific aspects of overseas culture, no single country stood out overall. The US was rated as the strongest country in two of the eight broad areas covered in the survey, with the highest proportion of respondents describing it as attractive or very attractive in terms of companies & brands and sports, while it took joint first place with Korea in terms of celebrities. Meanwhile Japan was the country most likely to be described as attractive in terms of history & traditional culture and technology, while Singapore was the leader in terms of literature and interacting with local people. Aside from celebrities, Korea also took the number 1 position in terms of media.

The UK was not seen as the top country in any specific field. The country's strongest position in relative terms was in the field of sports, where 66 per cent of Thais saw the country as attractive – more than any other country except the US. Aside from this area the country's highest position was as the 4th most popular country in terms of celebrities and the 5th in terms of both popular media and literature.

One area where the UK performed particularly poorly was in terms of interacting with local people, where only 55 per cent of people described the UK as attractive – lower than any other country asked about in the survey.

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



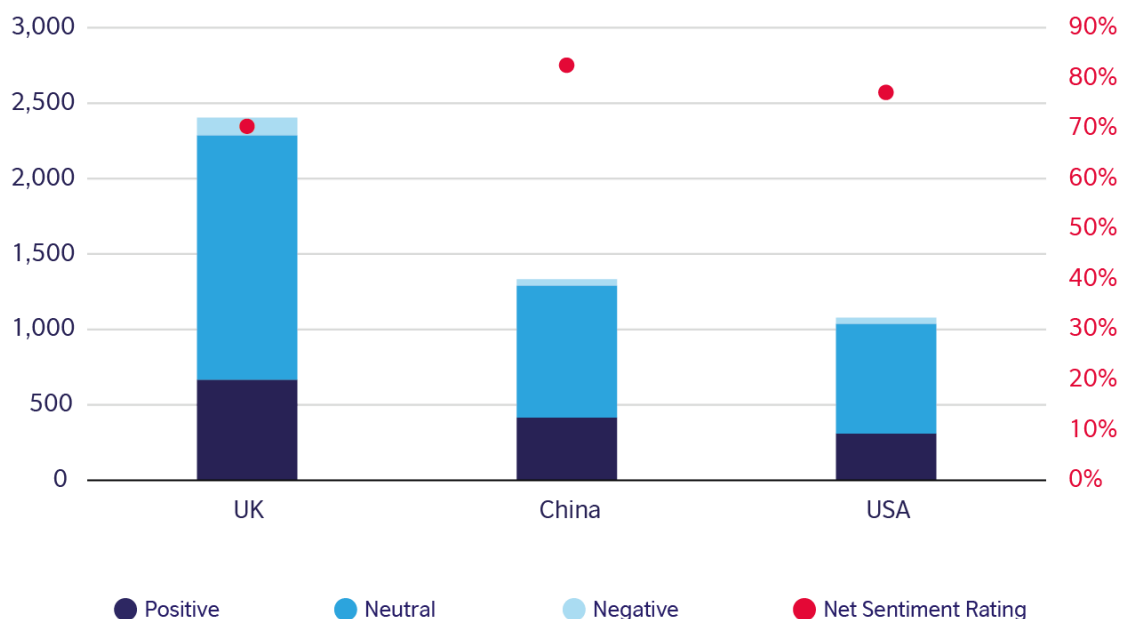
Base: All respondents in Thailand (2,200 respondents)

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 Thais; 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 Thai food; drinking culture

Analysis of social media posts showed that the UK attracted more discussion volume than either of the two other countries, on culture-related subjects. However, the UK had a slightly lower net sentiment ratio (NSR)² than posts related to the US or China. Nevertheless, all countries had substantially more positive than negative posts.

² NSR is defined as (the number of positive posts minus the number of negative posts) divided by (the number of positive plus negative posts)

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

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

The subject accounting for the largest share of discussion in all three of these countries was popular culture, with this subject making up a particularly large share of discussion related to the US. Top discussion topics within this field included the latest music, movies, fashion shows and celebrity news.

The second most discussed subject overall was language and history, with one particularly popular topic in this area being accents with a large number of posts related to British and American accents. People mentioned watching movies, music and interviews to learn and pick up these accents.

For the UK specifically, sports was a particularly popular discussion topic – accounting for a large part of the UK’s advantage in total discussion volume. This mostly consisted of conversations about the latest news in the Premier League, while discussions of sports in the US and China were much less common.

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

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

3.4 Strengths and weaknesses of different overseas countries

When asked about the UK's greatest strengths, the most common answer in focus groups was the country's higher education system. The UK was seen as a top country for overseas study, especially among students and parents engaged in the application process for a course abroad and among returned alumni. More details on Thai perceptions of overseas higher education are described in Section 4.

Another key strength of the UK, across all groups of Thai people, was football. Thailand has a large number of fans of Premier League clubs, and this contributes strongly to the UK's image in many people's eyes.

Beyond this, one of the strongest images Thais have of the UK is linked to a perception of British people as aristocratic and cultured. Focus group participants talked about manners, afternoon tea and etiquette, seeing this as an advantage the UK has over other countries. A British accent is also perceived as high-class among both foreigners and English-speaking Thais.

Some focus group participants also saw literature as a major advantage of the UK, naming historical authors or playwrights such as Dickens and Shakespeare. However, this is seen as irrelevant by most Thais who do not have a strong interest in foreign literature.

Finally, the UK is seen as an example of a developed Western country which offers an attractive lifestyle in a more relaxed environment than in comparably developed Asian countries, as well as high wages. Western countries in general, including the UK, are regarded as offering more freedom than Thailand, and the UK is seen as an example of

this. Moreover, the UK is seen as safer than the US while offering many of the same advantages.

Most Thais do not see the UK as having major disadvantages. Instead, the strongest negative factor in terms of their perceptions of the UK is a lack of awareness and exposure, which is particularly acute amongst younger segments.

This leads to a perception that the UK has no particularly remarkable aspects. For example, a parent commented that *“UK media is not outstanding – USA media is more popular”*. Similarly another focus group participant said that *“UK technology can compete with others [...] but it’s not the top compared to China and the US”*, and the living environment in the UK was described as similar to other parts of Europe with no particular competitive edge.

The UK’s handling of the Covid pandemic had both positive and negative effects on perceptions of the country. In the focus groups, which were conducted in early 2021, some participants saw the Astra Zeneca vaccine as evidence of the UK’s strength in the healthcare sector, although others criticised British people’s reactions to the pandemic such as unwillingness to wear masks.

When asked to choose several countries’ strengths and weaknesses from a list, the UK’s strongest performance relative to other overseas countries was in the field of education – 40 per cent of respondents felt that the UK had a strong advantage in this area, second only to the US which had 42 per cent agreement. Meanwhile the area seen as the strongest advantage in absolute terms was that the UK was a wealthy developed country with strong economic power, which 46 per cent saw as a major UK advantage.

Other areas where the UK performed relatively strongly were the country’s history and its international influence – both ranked 3rd overall. However, in most fields the UK’s position was fairly unremarkable, and the UK was neither the strongest nor the weakest overseas country by any metric.

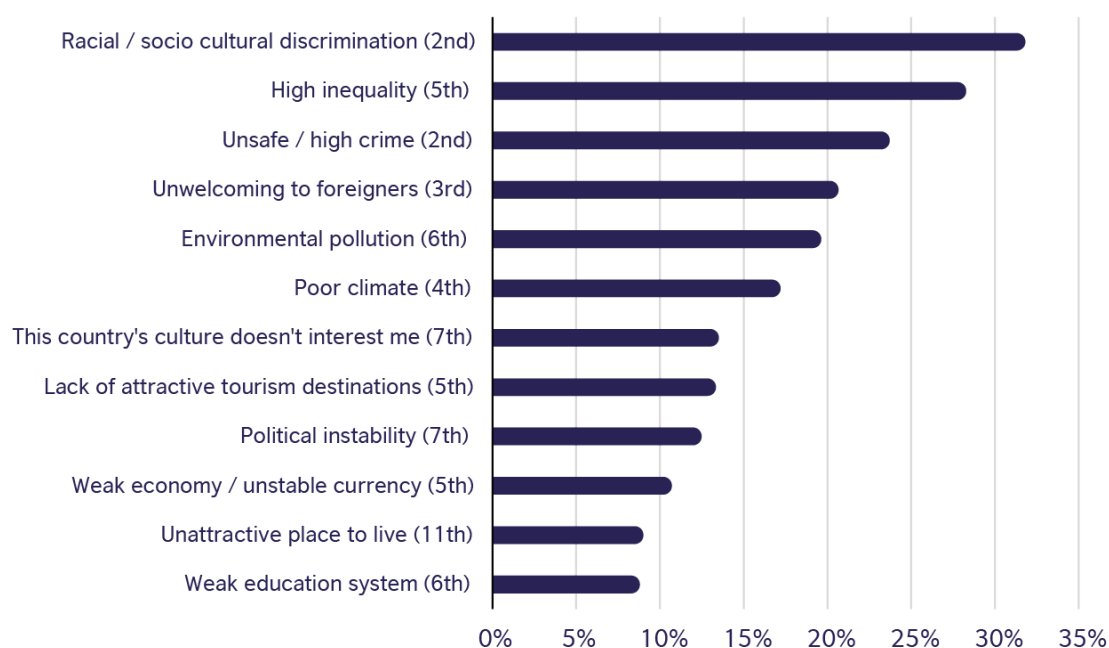
Figure 15: Perceptions of UK strengths

Base: All respondents in Thailand (2,200 respondents)

The countries who performed the most strongly on this question were the United States – rated top in five of the 12 categories, including economic power, education, science & innovation, international influence and political stability – and Japan, which performed the most strongly in terms of tourism, environment and overall cultural attractiveness. Meanwhile Australia was seen as the top country for its living environment and lack of discrimination, while China was the most likely to be described as attractive for its history and Singapore led in terms of safety.

When asked about different countries' weaknesses, the UK did not come out worst on any question but there were two areas where the country performed the second-worst across the 11 overseas countries asked about in the survey. 32 per cent of Thais said that racial or socio-cultural discrimination was a major disadvantage for the UK, while 24 per cent named a lack of safety or high crime as an issue. In both of these areas the proportion of people saying that the UK had important disadvantages in the relevant field was second only to the US. Other areas where the UK did relatively poorly were in terms of being unwelcoming to foreigners – where the UK was the third most likely country to be described as having a disadvantage – and as having a poor climate.

Nevertheless, the proportion of people describing the UK as having disadvantages in any area was less than a third. Most Thais did not see the UK as having any major disadvantages.

Figure 16: Perceptions of UK weaknesses

Base: All respondents in Thailand (2,200 respondents)

3.5 Perceptions of people from different countries

As described above, focus groups showed that the general perception of British people among Thais was related to a stereotype of being polite, well-mannered, well-dressed and aristocratic. Even among Thais themselves, a British accent was described as making people seem to be “*of a higher standard*” and giving social advantages.

However, the negative side of this stereotype is that they are also seen as arrogant, with focus group participants commenting that “*British people are snobbish and look down on people*”.

Meanwhile when it comes to work, British people were described as well-disciplined, polite and punctual, with Thais believing that in business cooperation, people from the UK would deliver their work well. Again, this has downsides as well as advantages, with people from the UK being described as “*slightly more rigid, and not as flexible as Thais*”.

When talking about people from other countries, people from Japanese were described as “*strict, well-disciplined and hard working*”, while Australians were described as friendly. Westerners in general were seen as more individualistic than Thais, which has both positive and negative aspects – greater freedom and independence were contrasted against factors like not complying with public health rules during the pandemic.

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 (45 per cent) and value their culture (38 per cent), followed by a description of British people as disciplined (34 per cent) and friendly (32 per cent) and helpful (29 per cent). The statements with the least agreement were descriptions of

British people as uninterested / distant and hard-working, with 17 per cent and 18 per cent agreement respectively.

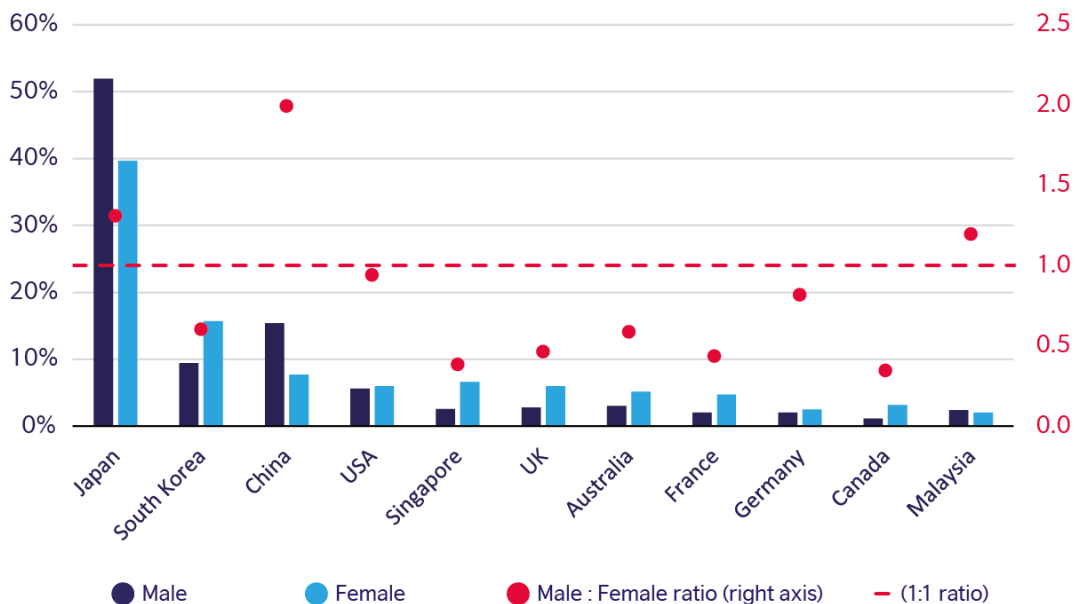
The UK performed relatively poorly on both of the two negative factors described above compared to other countries – British people were more likely to be described as uninterested or distant than people from any other country, while they were rated as the second most racist national group after Americans. The UK also performed comparatively poorly when Thai people were asked whether people from a given country were helpful and kind, with only 23 per cent agreement – lower than anywhere except China. In other areas perceptions of British people were more in line with the average across other overseas countries.

3.6 Factors affecting interest in different countries

In Thailand, as in other countries, there are strong gender differences in the level of interest in certain countries. While Japan is seen as the most attractive overseas country in cultural terms by both male and female survey respondents there is a substantial gap between these two groups, with 52 per cent of males but only 40 per cent of females preferring the country.

Chinese culture is also comparatively more attractive to male Thais, with roughly twice as many males as females seeing the country’s culture as interesting. In comparison South Korea, Singapore, the UK, Australia, France and Canada are all noticeably more popular among female survey respondents. Looking at the UK, 6 per cent of female respondents but only 3 per cent of males see this as their preferred overseas country in terms of culture.

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



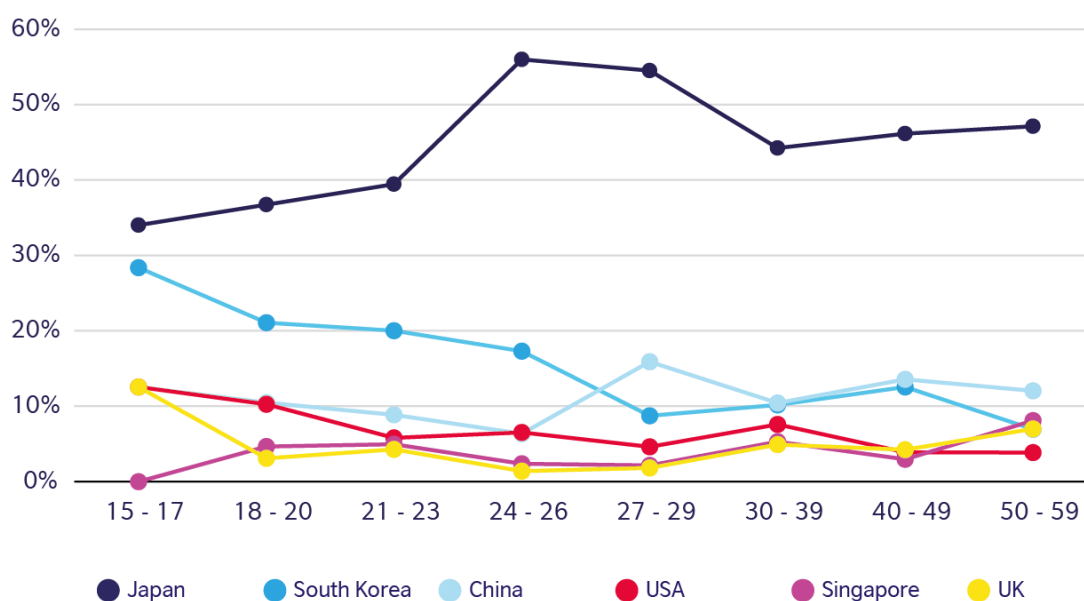
Base: Respondents at least somewhat interested in overseas culture (1,690 respondents)

Analysis by age shows that interest in Japanese and Korean culture show opposite trends. Japan is comparatively more popular in older age groups, while younger Thais

are substantially more likely than their parents' generation to see South Korea as attractive – 28 per cent of the 15-17 age group name this as their favourite overseas culture compared to just 7 per cent of 50+ year olds.

The comparatively low proportion of Thais choosing the UK as their favourite overseas culture means that it is difficult to see clear trends in interest in this country. In general there is a moderate trend towards increasing interest among older age groups; the 15-17 age group is an exception here but the number of survey respondents in this age band was low and this is likely just due to random variation. Interest in Chinese culture also increases with age, while the US appears to be more popular among younger age groups.

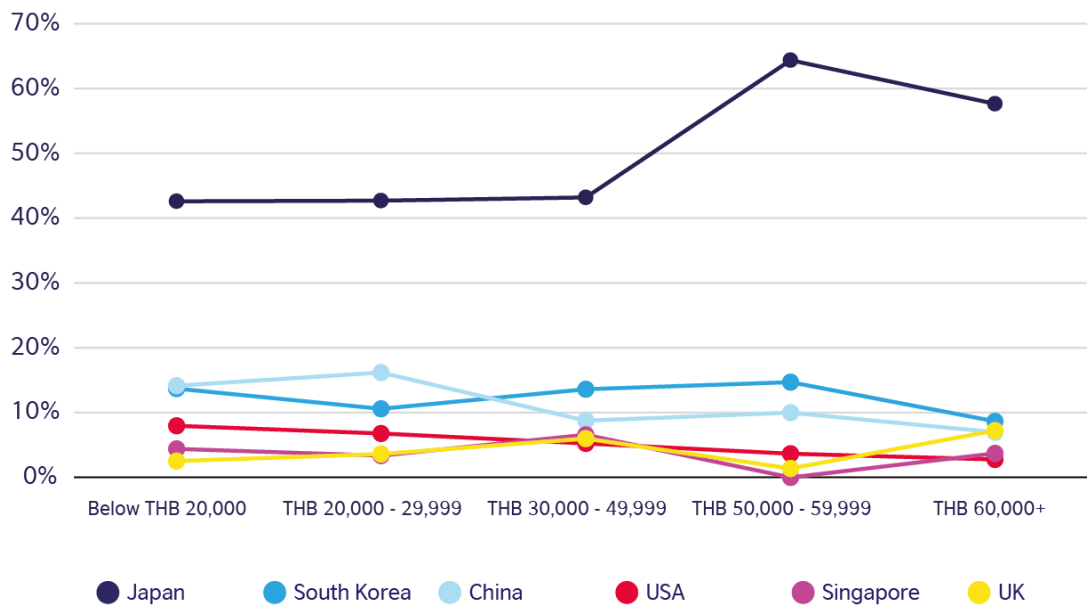
Figure 18: Preferred overseas country in terms of culture, by age



Base: Respondents at least somewhat interested in overseas culture (1,690 respondents)

A comparison between groups by income level shows that Thais with higher average incomes are substantially more likely to name Japan as their preferred overseas country in terms of culture, while there is a clear connection between preference for China and lower household incomes.

Looking at the UK, there is a general trend towards increasing level of interest as household incomes increase. Among Thais who were interested in overseas culture, 7 per cent of those with monthly household incomes of THB 60,000 (£1,300) and above named the UK as their preferred overseas culture, more than double the 3 per cent proportion of those in the lowest household income band (below THB 20,000 / £450 per month). The USA, meanwhile, showed the opposite trend with a somewhat higher degree of interest among lower-income households.

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

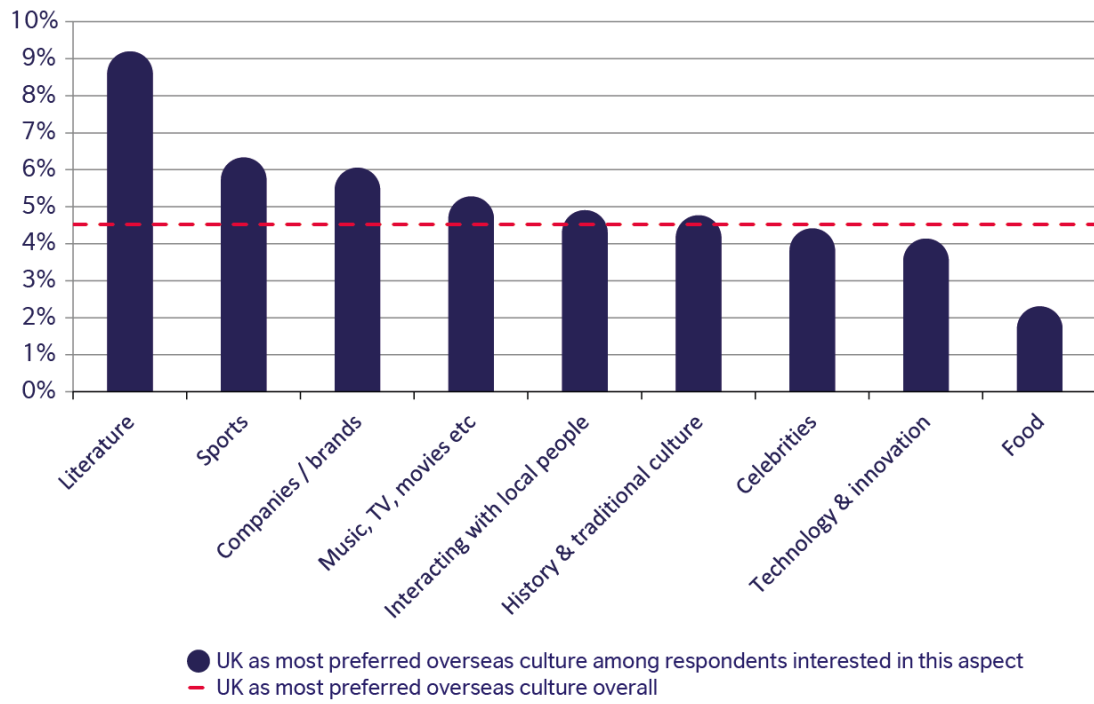
Base: Respondents at least somewhat interested in overseas culture (1,690 respondents)

The countries a person sees as most attractive in cultural terms is also affected by the specific aspects of overseas culture they are interested in.

In the case of the UK, people who named literature among the top three aspects of overseas culture they are interested in were roughly twice as likely as average to name the UK as their preferred overseas culture – matching with the general perception of literature as one of the UK's main cultural advantages. Meanwhile people expressing interest in sports – another area seen as a major UK advantage – and companies / brands were also more likely to prefer UK culture. Meanwhile those who were more interested in food were relatively less likely to name the UK, again matching with Thais' generally poor opinions towards British food.

In other countries, people who expressed an interest in overseas celebrities were most likely to name Korea as their favourite overseas culture, with this group more than twice as likely as the overall survey population to prefer Korean culture. While Japan was the most popular country in all other groups it performed particularly well among people interested in food, technology and history & traditional culture, again areas seen as Japanese advantages.

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



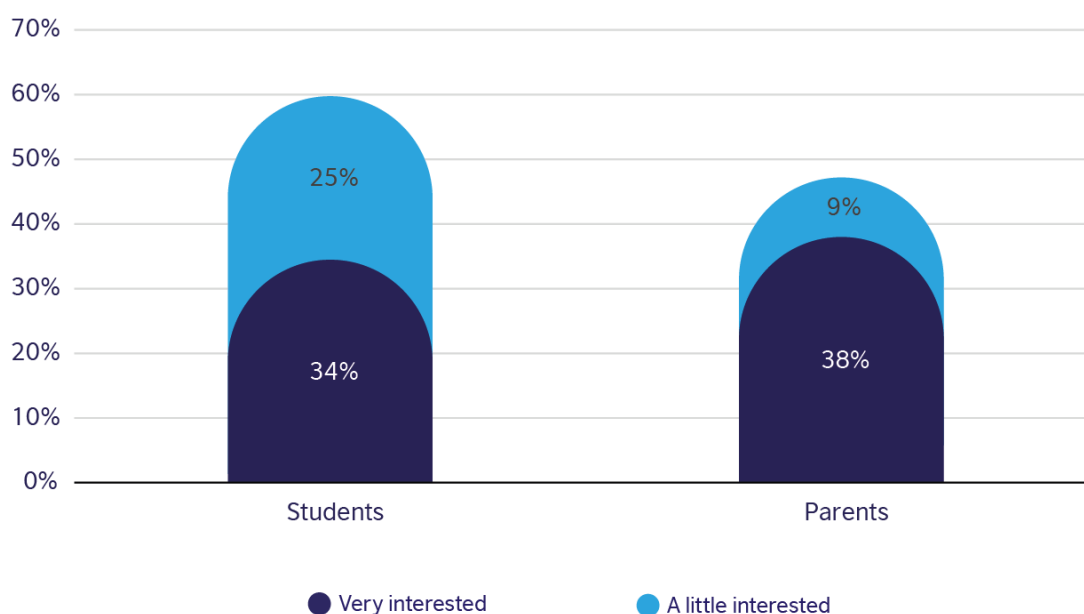
Base: Respondents at least somewhat interested in overseas culture (1,690 respondents)

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

4.1 Interest in overseas education

While a relatively high proportion of young Thais claim to be interested in studying abroad, this proportion was still somewhat lower than in other ASEAN countries. Slightly over a third of students described themselves as “very interested” in overseas study, with a further 25 per cent saying that they were at least “a little interested”. The proportion of parents describing themselves as “very interested” was even higher than among students, with 38 per cent giving this response while 47 per cent were at least a little interested.

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



Base: Students (233 respondents) and parents (785 respondents)

As in all ASEAN countries, the number of students expressing an interest in studying abroad is far higher than the actual proportion who say that they want to do so. The most recent data available through UNESCO shows that around 2.41 million Thai students were studying a tertiary programme domestically in 2016, while slightly under 33,000 Thais were studying tertiary programmes abroad in 2018 – roughly 1.4 per cent of the domestic student population.

This suggests that survey responses are measuring a broad level of initial interest in overseas study, and the majority of those who expressed an interest in overseas study – even those who described themselves as “very interested” – are unlikely to actually study abroad. This is likely due to practical factors such as the high cost of overseas education (including both tuition fees and living expenses), academic and language requirements, and the need to stay away from home for a long period. Nevertheless, while initial interest in studying abroad is not the only factor influencing overseas study, it is still an important factor in this decision.

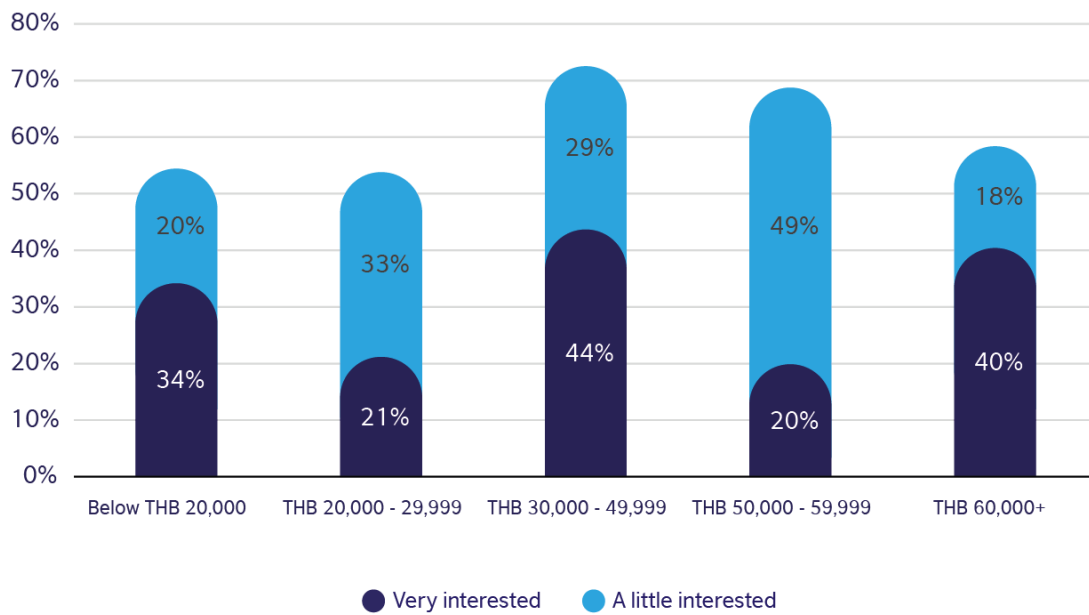
Focus group discussions included a larger proportion of people who were already considering overseas study for themselves or their children or who had previously studied abroad. These people, along with some of the focus group participants who were not selected based on their engagement with overseas study, mainly saw overseas education as having the potential to upgrade their quality of life by securing a career with bright future. While the Covid-19 situation had delayed overseas study in some cases, it did not deter future interest in studying abroad.

People in these groups generally saw higher education in Thailand as broadly acceptable considering the country's level of development but described it as lacking in several areas such as proactive problem solving, critical thinking and self-motivation, while English language proficiency was also seen as a major advantage of overseas study. Reasons to study abroad included attending renowned world-class institutions, experiencing a different learning style, an association with successful past graduates including politicians and the Thai royal family, improving English proficiency, and the opportunity to work abroad and earn a higher salary.

Survey results show that, among age bands with large numbers of students, the group with the largest proportion wanting to study abroad was the 21-23 age band, with 43 per cent of this group saying they were very interested in overseas study. Meanwhile only 34 per cent of students in the 18-20 age band and 37 per cent in the under-18 group said they wanted to study abroad. Figures from the UK's Higher Education Statistics Agency show an even greater imbalance, with more than two thirds of Thai higher education students in the UK studying at the postgraduate level.

However, survey results did not show the strong connection between interest in overseas study and household income that existed in most other ASEAN countries. While students in the highest income band were more likely than average to describe themselves as interested in studying abroad, this group had only the second-highest level of interest; meanwhile those in the lowest income band were no less likely than the average respondent to want to study abroad. This suggests that initial interest in overseas study in Thailand does not appear to be strongly related to a student's financial situation, although the cost of overseas study means that it is likely that the eventual decision to study abroad will still depend strongly on household income.

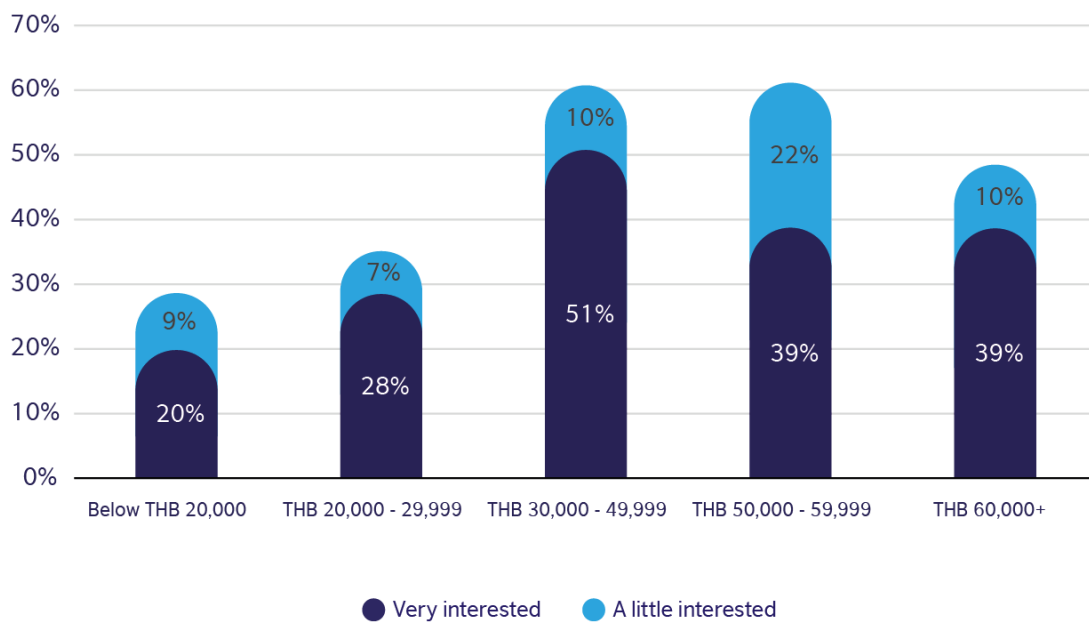
Figure 22: Students' interest in overseas study by monthly household income



Base: Students (223 respondents)

Parents' level of interest in overseas study had a stronger correlation with income than among the students themselves, although even here the wealthiest group were not the most likely to say they wanted to study abroad. The main difference between income levels among parents was between those in the lowest two income bands – corresponding to monthly household incomes below THB 30,000 (£680) – and those in higher-income groups.

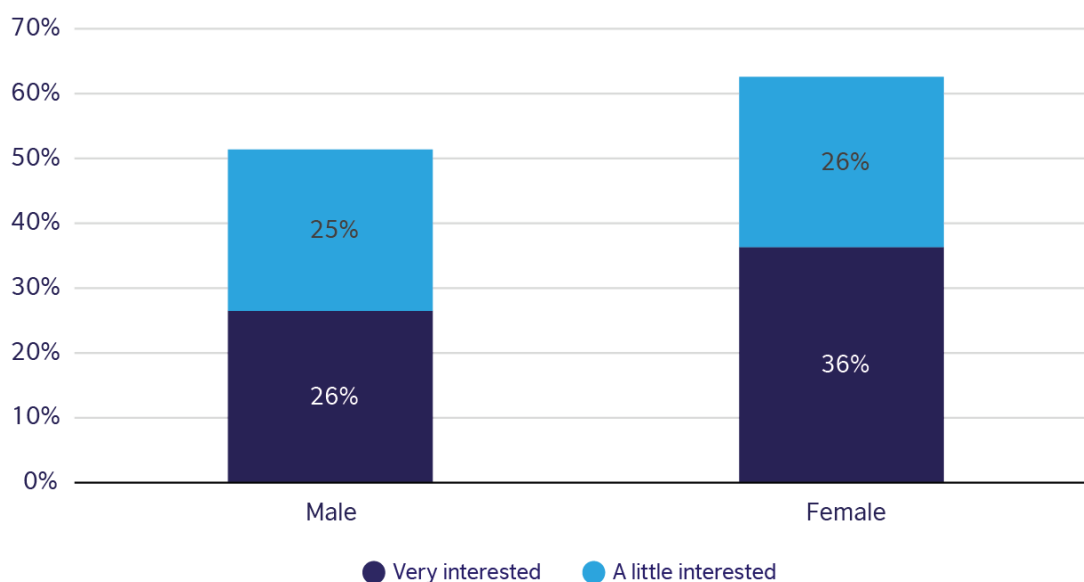
Figure 23: Parents' interest in overseas study for their children by monthly household income



Base: Parents (785 respondents)

As with overall interest in overseas culture, female students were noticeably more likely to be interested in studying abroad. Overall, 36 per cent of female students said they were very interested in studying overseas, compared to only 26 per cent of males. The corresponding proportions among those who were at least a little interested were 63 per cent and 51 per cent respectively. This roughly corresponds to 58:42 female-to-male gender ratio among Thai students in UK universities.

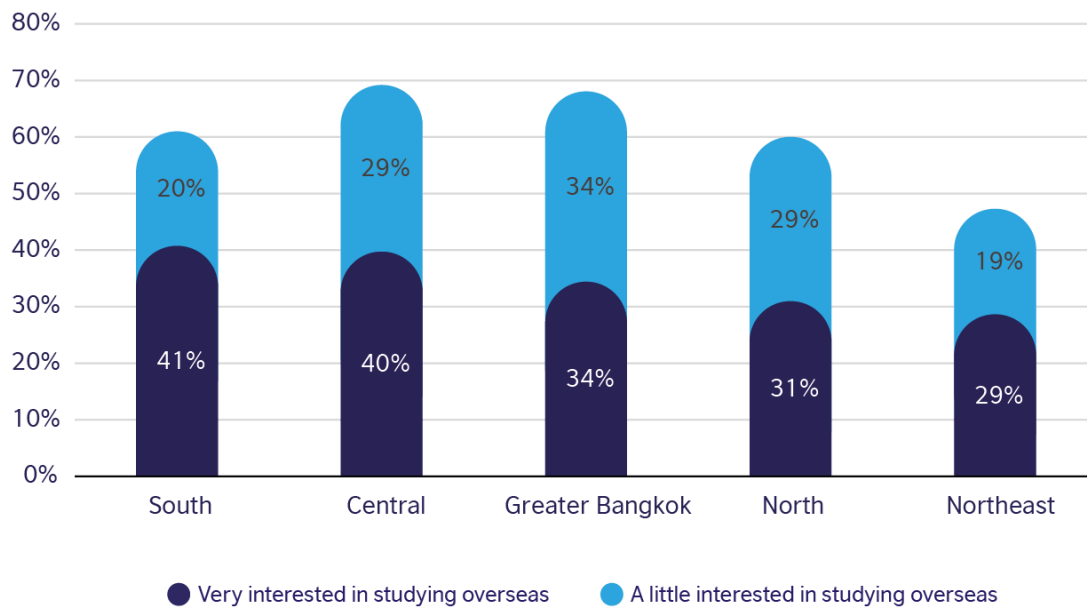
Figure 24: Students' interest in overseas study by gender



Base: Students (223 respondents)

There is also a noticeable gender gap in parents' attitudes towards overseas study for their children. Thai mothers were far more likely than fathers to say they wanted their child to study overseas, with almost half of female parents describing themselves as very interested in this option compared to only a quarter of male parents.

As noted above, Thailand was unusual among ASEAN countries in that residents of the country's capital were not among the most likely groups to express an interest in overseas culture. A similar trend holds for overseas study, with only 34 per cent of students in Bangkok describing themselves as very interested in overseas study – the same as the overall average across the country.

Figure 25: Students' interest in overseas study by region

Base: Students (223 respondents)

When deciding where to study, survey results showed that the most important factor for students was education quality, with 72 per cent naming this among the top factors they consider when thinking about overseas study destinations while slightly under two thirds of parents said the same thing.

This aligns with comments made in focus groups, where many participants were actively engaged in the overseas study application process for themselves or their children or had studied abroad in the past, and so were likely more engaged with the overseas study decision process. The reputation and recognition of an overseas university was the most important factor among focus group participants. This included the university's worldwide ranking and its strength or ranking in various specific fields of study, and employment of renowned lecturers. Other factors relating to the course such as study style, the variety of programmes available, language of instruction and course duration were also seen as very important. For example, a prospective student commented that there is a perception that Thais have a perception that "[people] who graduated from UK has better education have better English communication skills", meaning that this would give an advantage when seeking employment in Thailand

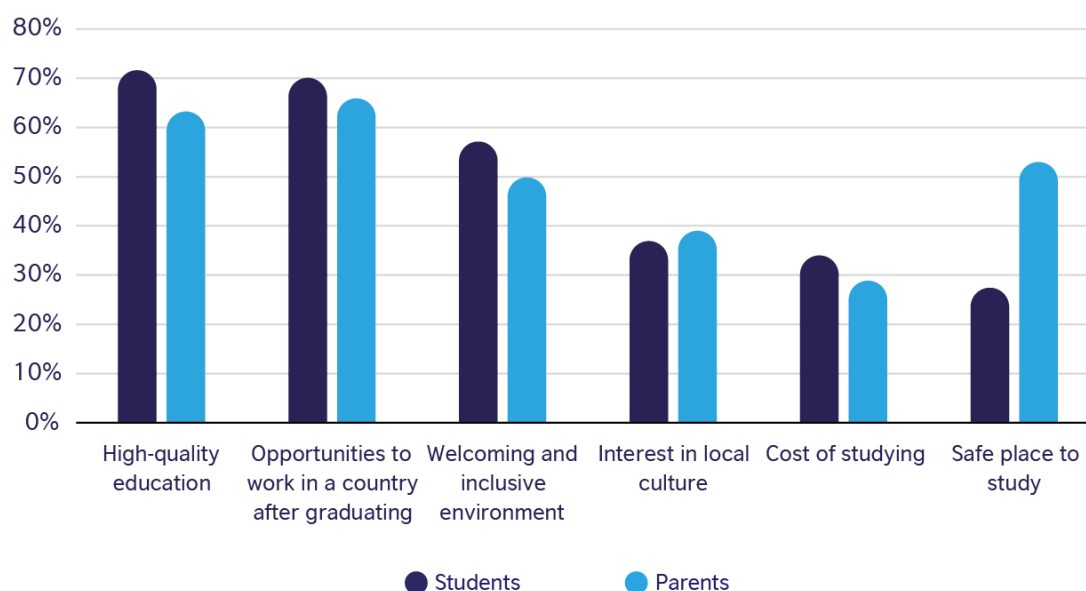
Survey results showed that the opportunity to work overseas after graduation was the second most important factor for student respondents, closely behind education quality, while for parent respondents it was the most important single factor. The ability to apply for a working visa after graduation was also discussed as a relevant factor in these groups, and many prospective students wanted to work abroad for at least a short period; however in these groups the importance was not as high as it was among survey respondents.

Another important factor discussed in focus groups was the cost of education. This was again seen as more important by focus group participants than to survey respondents

who said they were interested in studying overseas, possibly indicating that students who have not closely looked into opportunities for overseas study are not aware of the costs involved in studying abroad. Focus group participants commented that they need to consider the total cost involved in studying abroad including tuition fees as well as other expenses, and that the duration of study also has a strong effect on this – for example, one alumnus said that “*The expense per year in the UK is higher than in the USA, but lower in overall expenses. So, I decided to study in the UK*”.

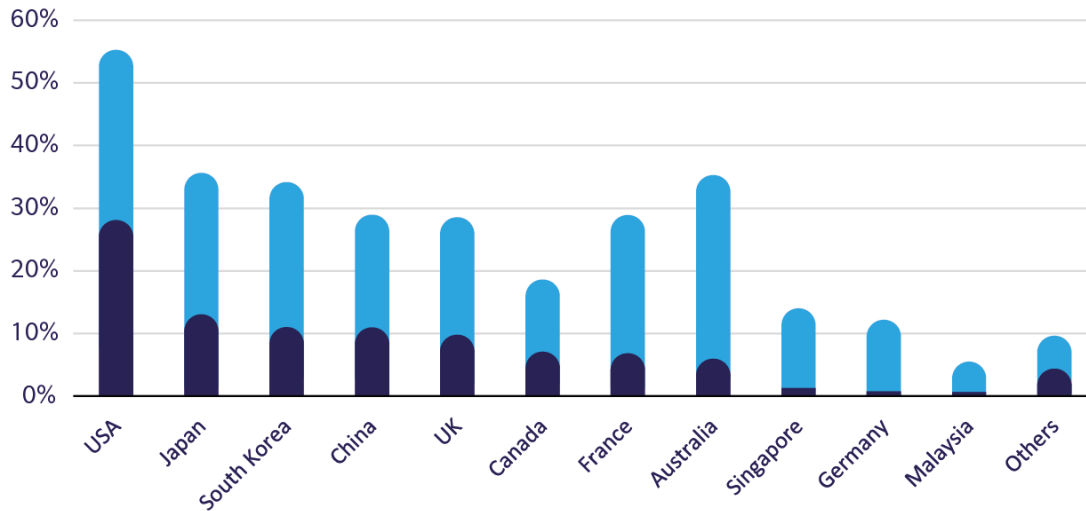
While interest in the local culture was described as being among the relevant factors for study decisions, this was not the most important issue. Nevertheless this was mentioned by parents in focus groups and relatively large proportions of survey respondents – 45 per cent of students and 39 per cent of parents. The influence of cultural interest on study choices is discussed in more detail in Section 4.

Figure 26: Students’ and parents’ important factors when considering a country for overseas study



Base: Students interested in studying overseas (141 respondents) and parents interested in their children studying overseas (386 respondents)

When asked about their first-choice country for overseas study, the US emerged as the clear leader among both students and their parents. In the case of students, this country was followed by Japan, with the UK coming in 5th place slightly behind Korea and China. Overall, 10 per cent of students who described themselves as interested in overseas study named the UK as their first-choice study destination.

Figure 27: Students' preferred countries for overseas study

Base: Students interested in studying overseas (141 respondents)

In comparison to these survey respondents, focus group participants had a greater level of engagement with overseas study, with many either in the process of applying to study abroad or having already done so. Results in this group were somewhat different, with a much higher level of interest in the UK. Universities in the UK were at the top of people's minds among the groups of parents, alumni and some prospective students, although less so among young Thai people who were not actively applying to study abroad.

When describing UK universities, these were described as "old and famous", with some focus group participants commenting on high-profile Thai people that had studied in the UK such as former prime ministers. Others commented that the UK "has something different from other countries" and talked about the prestige associated with the UK more broadly, such as the perception of British English accents as high-class.

As noted above, education quality was seen as a leading factor in study decisions, and this is an area where the UK is seen as having an advantage. As well as the ranking or reputation of individual universities, prospective students and their parents had positive views of the UK style of education, saying that this was more practical than universities in Thailand and gave graduates more confidence. Another advantage of British education according to a returned alumnus was the duration of the country's master's degrees, meaning that they were able to complete a course in less time than it would have taken in another destination, while the country was also seen as offering greater freedom for students compared to Thailand, being safer than the US, and offering good prospects for working after graduation either in Thailand or overseas.

However, some students and parents did express negative views about some aspects of UK education. The main issue here was cost, with the country seen as an expensive destination in terms of not only tuition fees but also living expenses while studying in the

UK. Some prospective students also had a negative response to the large difference in tuition fees between British people and international students.

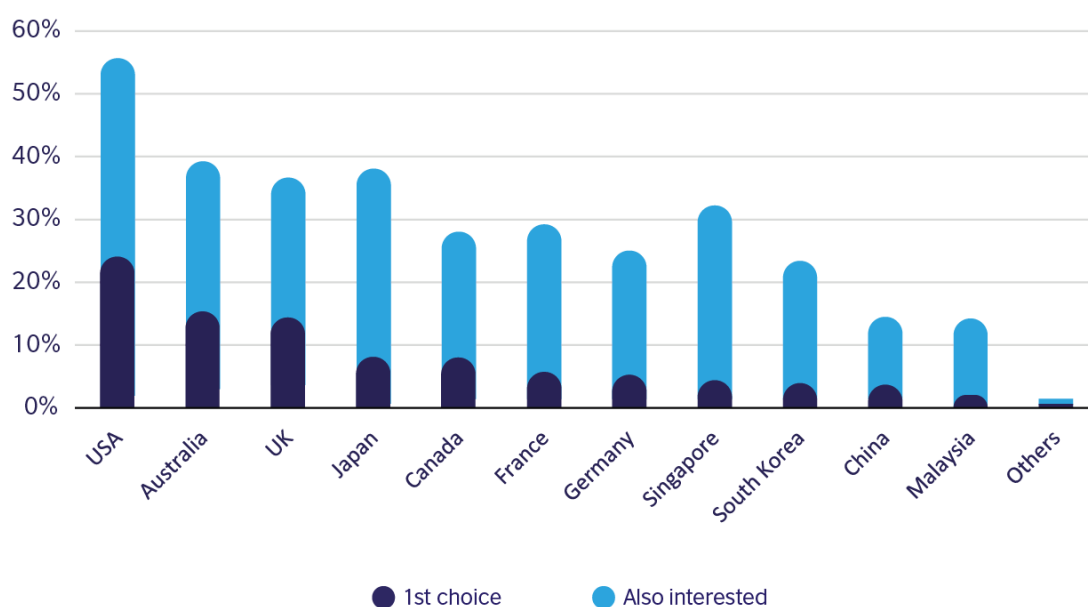
Other countries were also seen as having strong higher education systems. The most-mentioned was the US, which like the UK is home to universities ranked among the top institutions worldwide and was seen as having world-renowned educational quality even beyond the leading institutions in the country. Some focus group participants saw the US as stronger than the UK in technology-related fields – sometimes linked to the country’s strength in technology more broadly rather than specifically about the education field – or said that the best country to study in would depend on the subject.

Other Western countries described as strong in education included Australia, Switzerland, Canada, Germany, and “Europe”. In general these countries were described as having similar advantages to the UK and US.

Several Thais also discussed China as an attractive higher education destination. Even among those that intended to study or had already studied in China, the country was not necessarily seen as offering the highest quality courses – China’s higher education system was seen as stronger than that of Thailand but not necessarily equivalent to the UK or US. Instead, money was described as an important reason to choose China as a study destination, as studying in China does not need the same budget as going to a Western country. China’s other advantages included its location, allowing students to return to Thailand more often, as well as the career advantages of learning Chinese.

Survey responses from parents gave quite a different country ranking to those from the students themselves. Among parents who were interested in their child studying abroad, the top choice of destination was again the US but this was followed by Australia and the UK, with 15 per cent and 14 per cent agreement respectively. The 4th most preferred country, Japan, was substantially behind, being preferred by only 8 per cent of parents.

Figure 28: Parents’ preferred countries for overseas study



Base: Parents interested in their children studying overseas (386 respondents)

Social media analysis shows that the most popular topic discussed in Thais' online posts related to education in three major destination countries (the UK, the US and China) is preparation and learning – a category including preparation for overseas studies and tests used in overseas study such as IELTS and SAT. Posts on this subject were particularly common for discussions of the UK, which can be attributed to a large amount of content around preparation and tips for tests like IELTS as well as a greater volume of posts related to learning English in relation to studying in the UK.

The UK is also the subject of the greatest share of social media discussion about overseas study more broadly, accounting for almost half (49 per cent) of total discussion about these three countries. Meanwhile the US accounts for a somewhat larger share of discussion than China.

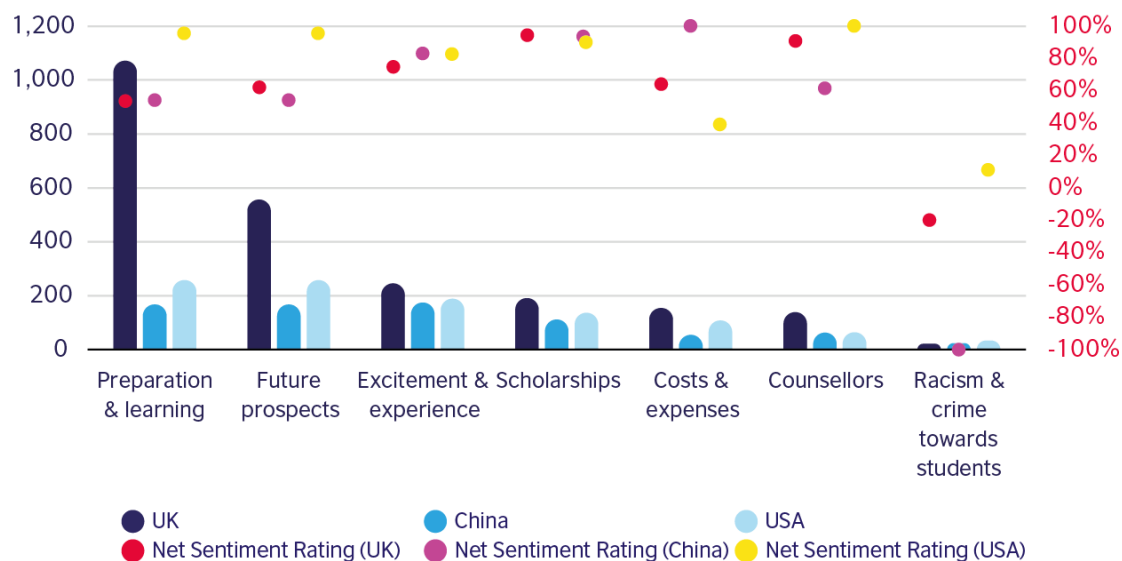
After preparation & learning, the second most popular overseas education-related topic discussed in Thai social media posts about overseas education – both overall and specifically related to the UK – was future prospects. This included discussions on subjects such as internship opportunities in the UK, sharing apprenticeship experiences in the US, and the pros and cons of living abroad after graduation compared to returning to Thailand.

The net sentiment ratio³ for posts in these areas related to UK was relatively positive – 54 per cent and 62 per cent, meaning that positive posts outnumbered negative posts by 3.3:1 and 4.3:1 respectively. However this was not as positive in either case as posts related to the US. Posts assessed as having negative sentiment included comparisons between the IELTS and TOEFL / TOEIC tests and complaints about high test fees.

Other popular subject areas included excitement and experience, including students' experiences studying abroad or posts expressing enthusiasm about being accepted to universities in the UK or other overseas countries; posts about scholarships, and discussion about the expense of overseas study. In the latter case the UK performs better than the US in terms of post sentiment, although posts on this subject related to China are more positive than for either, reflecting the perception that studying in China has cost advantages compared to Anglophone countries.

³ NSR is defined as the number of positive posts minus the number of negative posts, divided by the number of positive posts plus the number of negative posts. A topic with an equal number of positive and negative posts would therefore have an NSR of 0%.

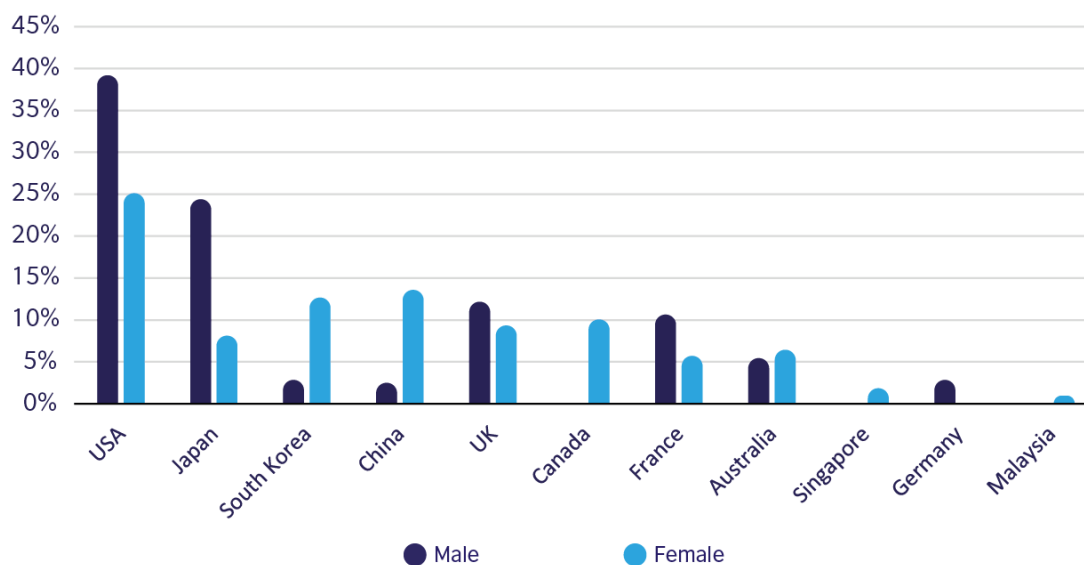
Figure 29: Social media post volume and net sentiment ratio by aspect of overseas education



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

Like students’ overall interest in studying abroad, attitudes towards preferred countries for overseas study varied by gender. The difference in students’ preference for the UK was relatively small, with 12 per cent of male students who were interested in studying overseas naming this as their first-choice country compared to 9 per cent of female students. There were larger differences in attitudes towards other countries: Japan was much more likely to be preferred by male students, 24 per cent of whom named it as their first-choice destination compared to only 8 per cent of females, while South Korea, China and Canada were all substantially more likely to be preferred by female students.

Figure 30: Students’ preferred countries for overseas study, by gender



Base: Students interested in studying overseas (141 respondents)

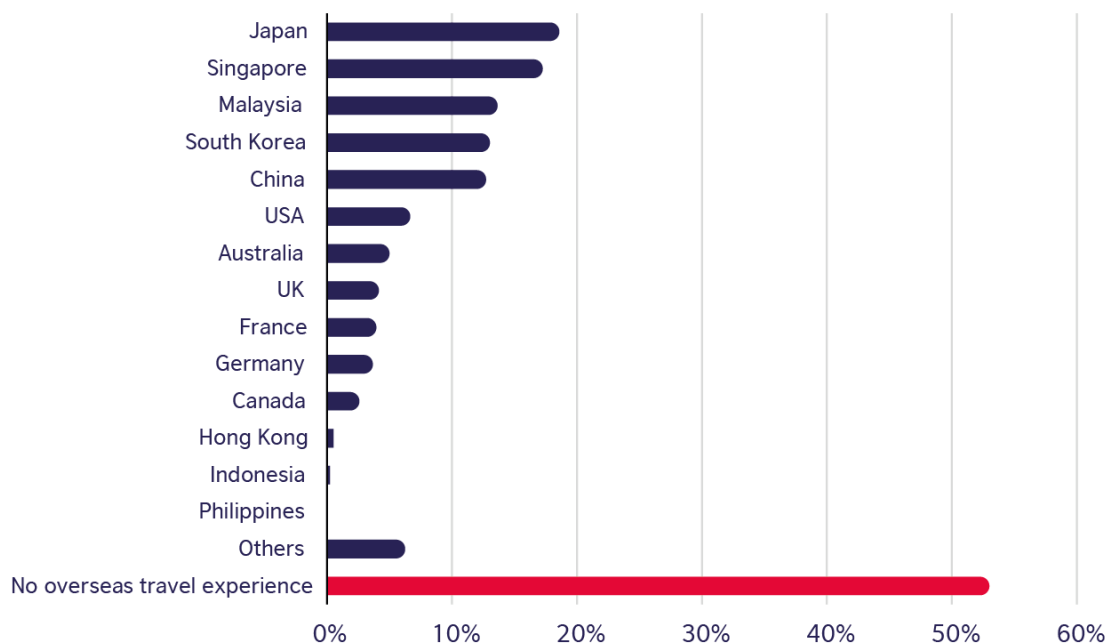
There did not appear to be any consistent trend in preference for the UK between different age or income groups in Thailand, nor was there a consistent trend in attitudes towards other major study destinations. Meanwhile by region the highest level of interest in UK study was in central Thailand and the Greater Bangkok regions, with students in the south of the country having the lowest probability of choosing the UK as their preferred destination.

4.2 Interest in overseas travel

Thai focus group participants described themselves as interested in overseas travel and did not foresee Covid-19 situation having a major impact on their future travel after the pandemic as they were confident about the vaccination plans which were starting to be implemented globally at the time of the discussions.⁴ Their main reason for travelling abroad was to enjoy something they had “never experienced before”, in terms of lifestyle, sightseeing, or interesting history of the destination country.

Almost half of survey respondents in Thailand had previously travelled abroad, while 53 per cent had never left their home country. No specific country stood out as a preferred destination, with the most popular, Japan, having been visited by 19 per cent; other countries that had been visited by more than 10 per cent of survey respondents included Singapore, Malaysia, South Korea and China. Meanwhile only 4 per cent had visited the UK, making this the 8th most popular country overall.

Figure 31: Previous travel experience by destination country



Base: All respondents in Thailand (2,200 respondents)

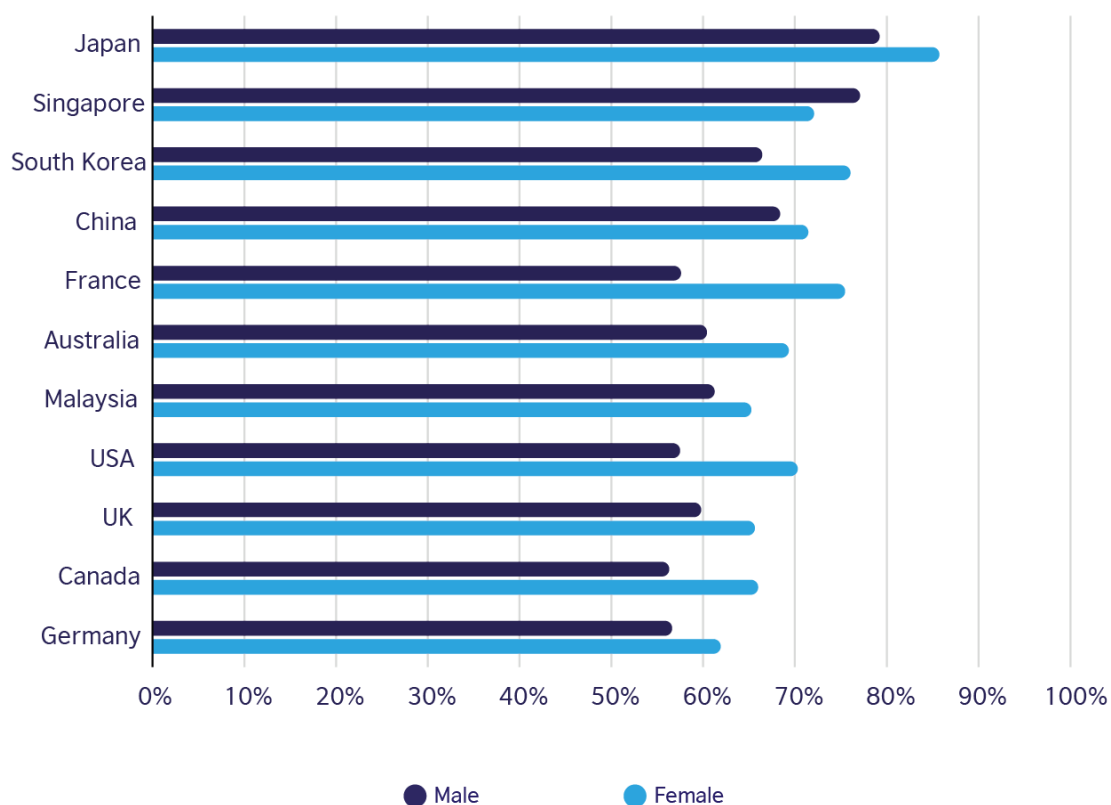
Japan was also the country that the largest proportion of respondents said they wanted to travel to in the future. In general Thai people’s attitudes towards travelling to any overseas country were very positive – even the country with the fewest favourable

⁴ Focus group discussions took place in early 2021

responses among the 11 countries asked about in the survey, Germany, had 59 per cent of survey respondents wishing to go there. The UK ranked 9th among these 11 countries with 63 per cent of Thais saying they wanted to visit.

Female Thais were generally more likely to say they wanted to go abroad than their male counterparts. Averaging across all countries, 71 per cent of Thai women and girls wanted to visit the average country compared to 64 per cent of males, and only one country (Singapore) attracted more interest among males than among females. Looking specifically at the UK, 60 per cent of male survey respondents said they wanted to visit compared to 66 per cent of females.

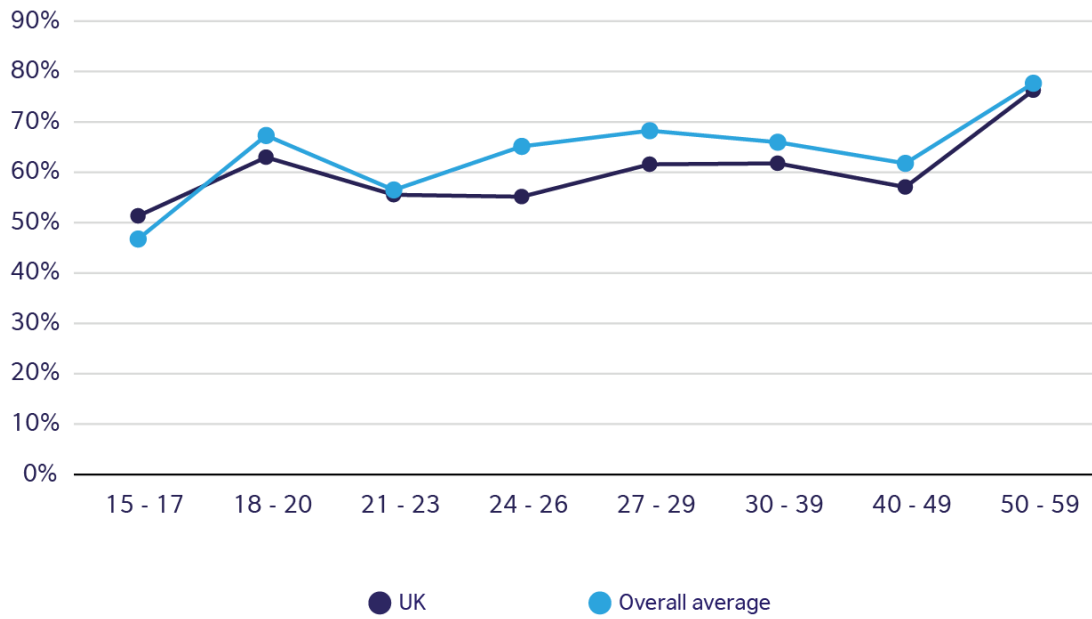
Figure 32: Interest in travelling to selected countries, by gender



Base: All respondents in Thailand (2,200 respondents)

The survey shows a general trend towards older people being more interested in overseas travel, both to the UK and on average across all 11 countries asked about in the survey. There was a noticeable uptick in attitudes towards overseas travel among the 50+ age group compared to younger people, perhaps due to greater interest in travelling among retirees or those close to retirement.

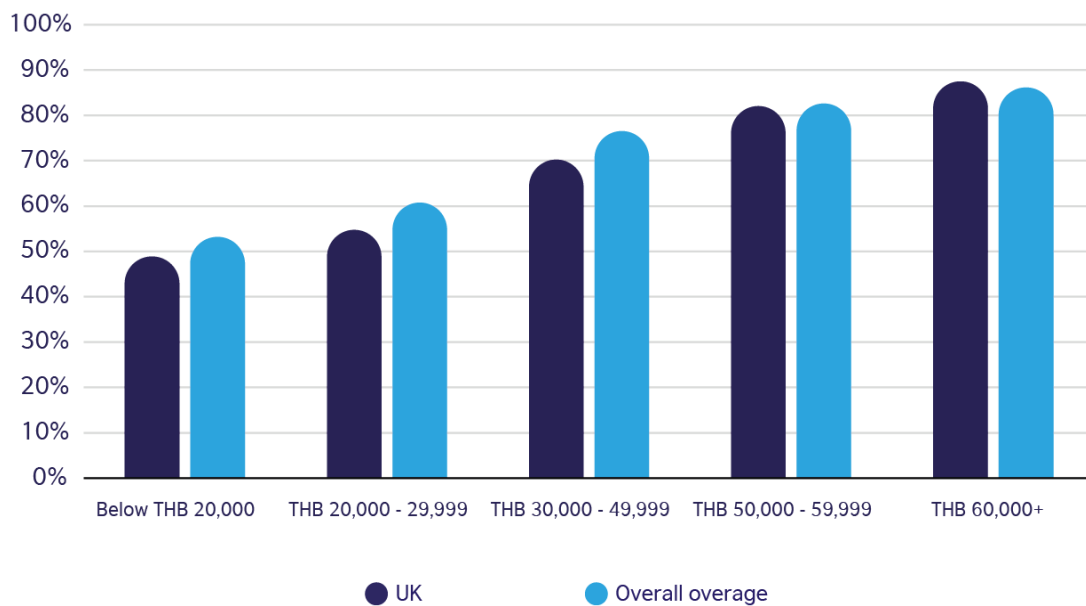
Figure 33: Interest in travelling to the UK, by age



Base: All respondents in Thailand (2,200 respondents)

Interest in both overall overseas travel and travel to the UK shows an even stronger connection, with travel intention increasing monotonically with household income. In the highest income group, people with monthly household incomes of THB 60,000 (£1,300) or higher, the proportion of people saying they wanted to visit the UK was 87 per cent; in comparison the proportion among people with monthly household incomes below THB 20,000 (£450) was only 45 per cent.

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



Base: All respondents in Thailand (2,200 respondents)

Meanwhile breaking down travel intention by region, the group with the highest level of interest in travelling to both the UK and to overseas countries in general was people from the capital Bangkok.

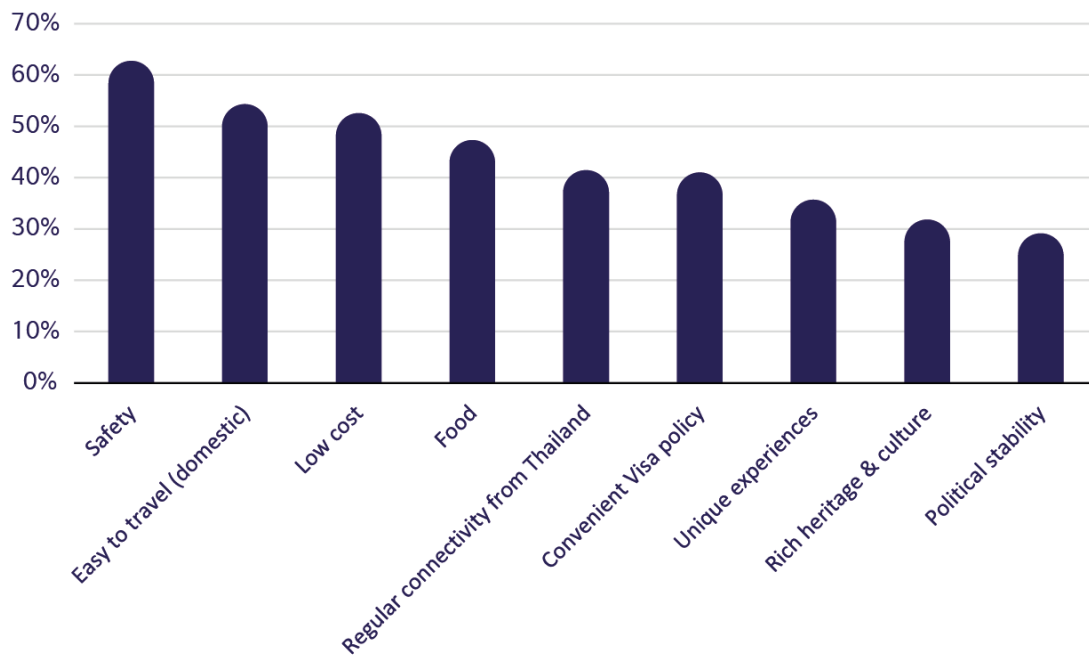
When focus group participants were asked about the important factors that determine the overseas countries they want to visit, the most common answer was unique sights and activities. In general Thais valued novelty, saying that they wanted to see things they had never seen before. The second most common reason to choose a country was closely related, with people talking about the richness of a country's history and talking about exotic places and ancient sites from centuries ago, as well as traditions and religion.

Lifestyle and commercial activities were also mentioned, especially for Western countries and more-developed Asian countries such as Korea and Japan. People talked about food, festivals, lifestyles, and activities such as shopping or attending shows and events. Several also gave answers related to weather or seasons, wanting to experience winter and autumn temperatures in countries with climates different to Thailand. A small number of people named more exotic destinations, such as adventure trips to the Himalayas or the African savannah.

People did not specifically mention the UK without prompting. When asked specifically about travel to the UK, interest was not especially strong – Thais did not have a strong awareness of the country and some mentioned a lack of unique attractions. A few people in younger segments said they UK was an attractive shopping destination, with outlet stores offering name-brand products for cheaper prices than in Thailand, but others' main impression was a perception of UK food as tasting bad.

Survey results showed that safety and cost are also important factors when Thais decide whether to travel to an overseas country. Safety was the most-chosen factor, with 63 per cent agreement, followed by ease of travel and low cost. Food was also very important, while survey responses suggested that unique experiences and rich cultural heritage are not the main factors for most Thais.

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



Base: All respondents in Thailand (2,200 respondents)

A comparison between the factors survey respondents said were important and their attitudes towards travelling to the UK show that groups rating the UK as relatively more attractive include those who saw heritage and culture, political stability and convenient visa policies as among the most important factors in their decisions. Meanwhile, those who saw low cost as important were less likely than average to want to visit the UK –an unsurprising result given the UK’s distance from Thailand and its image as an expensive destination.

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



Base: All respondents in Thailand (2,200 respondents)

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

4.3 Interest in overseas business, work and immigration

The proportion of Thais who said they wanted to do business with overseas countries was relatively high, ranging from 63 per cent for Singapore to 40 per cent for Canada. The UK was towards the bottom of this range, with 44 per cent of survey respondents saying they would be interested in doing business with a UK partner, similar to Australia and to European countries. Meanwhile three countries attracted more than 50 per cent agreement: Japan, China and the US.

Focus group discussions confirmed this high level of interest – most participants, especially in younger age groups, had a positive attitude towards overseas business opportunities and were at least open to engaging in this sort of activity in the future. However, most did not expect to take any active steps in this direction in the near future, saying instead that this was not relevant to their current situation even though they were interested in overseas business in the future.

Attitudes towards living and working abroad were also relatively high among prospective students, who saw this as leading to a better career and higher-earning opportunities and therefore a higher quality of life. However, other groups, including young people who were not actively looking to study abroad, had a lower level of interest, preferring to stay closer to home.

The UK was named among the most attractive countries for long-term overseas residence based on the potential to earn a high salary there. Other countries attractive for the same reason included the US and China, while there were also positive attitudes towards other parts of Asia – including Korea, Singapore, Taiwan and mainland China – as countries which are closer to home and have a more familiar culture.

Survey results showed that the proportion expressing interest in living in the UK for a long-term period (excluding overseas study) was slightly over a quarter, while the overall average across 11 countries was 30 per cent. The most popular country in this regard was again Singapore, while China attracted the lowest amount of interest.

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



Base: All respondents in Thailand (2,200 respondents)

In contrast to some ASEAN countries there was no major gender difference in interest in international business. 44 per cent of male survey respondents expressed an interest in doing business with UK partners compared to 43 per cent of females, while the gender gap after averaging across all countries was less than a single percentage point. However, there was a larger difference between male and female respondents when asking about long-term residence – female respondents were more likely to say they wanted to live for an extended period in all countries included in the survey, with the gender gap in the UK being 30 per cent to 23 per cent.

When talking about doing business in overseas countries, Thai people generally said that the main issue affecting their decisions was the business opportunities available in those countries, with strong / rapidly growing economies, large populations, gaps unfilled by local companies, strong infrastructure, favourable regulations / ease of doing business, and a local business scene that welcomed overseas trade or investments being the main factors of importance. Geographical distance is also very important which raised the attractiveness of China – which was described as having a strong economy with high purchasing power and an interest in investing in countries such as Thailand – and also Cambodia, which was seen as having attractive investment opportunities for Thai businesses.

Survey results gave a similar story – the most-chosen factors seen as important when deciding to do business with partners from a country were ease of doing business, good infrastructure and cooperative government policy.

Meanwhile when talking about living overseas, quality of life and higher salaries were roughly equally important to Thai survey respondents and were also described as important by focus group participants. However, focus group participants placed a

higher level of importance on safety, welcoming attitudes towards foreigners / lack of discrimination, and the cost of living.

When asked about both business cooperation and long-term residence, “rich heritage and culture” was the option least likely to be chosen by survey respondents, with 27 and 20 per cent of people respectively describing this as an important factor. However, more loosely culture-related topics such as the behaviour and attitudes of locals were described as more important as described in the following section.

4.4 The link between cultural interest and overseas interaction

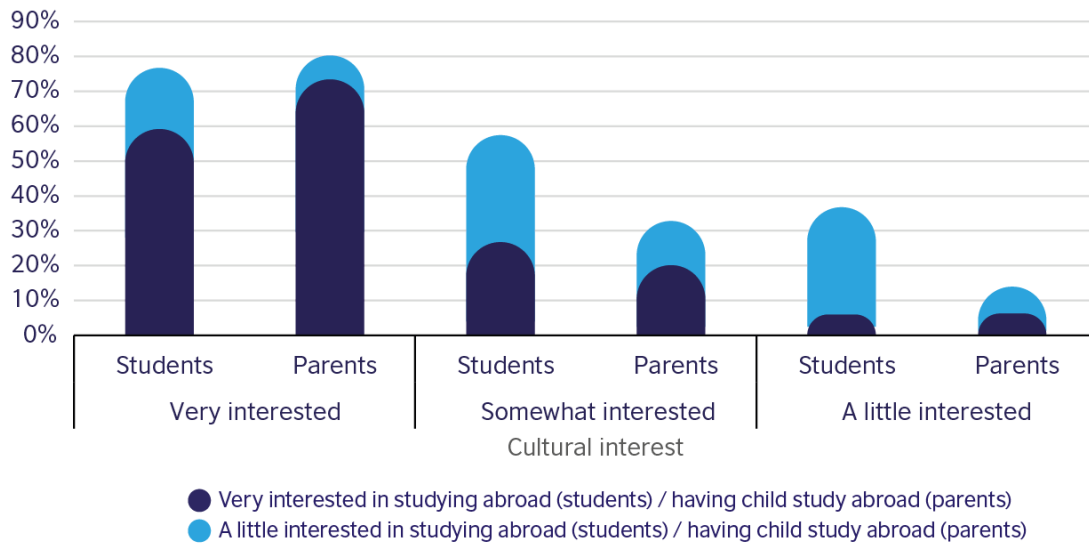
The British council’s research revealed a strong connection between interest in overseas culture and interest in studying abroad, as well as a strong connection between interest in a particular country’s culture and preference for that country as a study destination. This trend was found in all ASEAN countries including Thailand.

Despite the relatively low proportion of potential overseas students who named culture as being among the top factors they considered in overseas study decisions, a comparison of survey results shows a strong and direct connection between overseas cultural interest and interest in studying abroad, both among students themselves and among their parents.

Overall, 77 per cent of students who described themselves as very interested in overseas culture said that they were at least somewhat interested in studying abroad, including 59 per cent who described themselves as “very interested”. This proportion is much higher than the proportion among those who only described themselves as “somewhat interested” in overseas culture, which in turn was higher than those who were only “a little interested”.

The pattern among parents was similar. Those who were very interested in overseas culture were the most likely to want their child to study abroad, with almost three quarters of this group describing themselves as “very interested” in sending them overseas. This level of interest fell off sharply as interest in overseas culture decreased, with only 14 per cent of those describing themselves as “a little interested” in overseas culture wanting their child to study abroad.

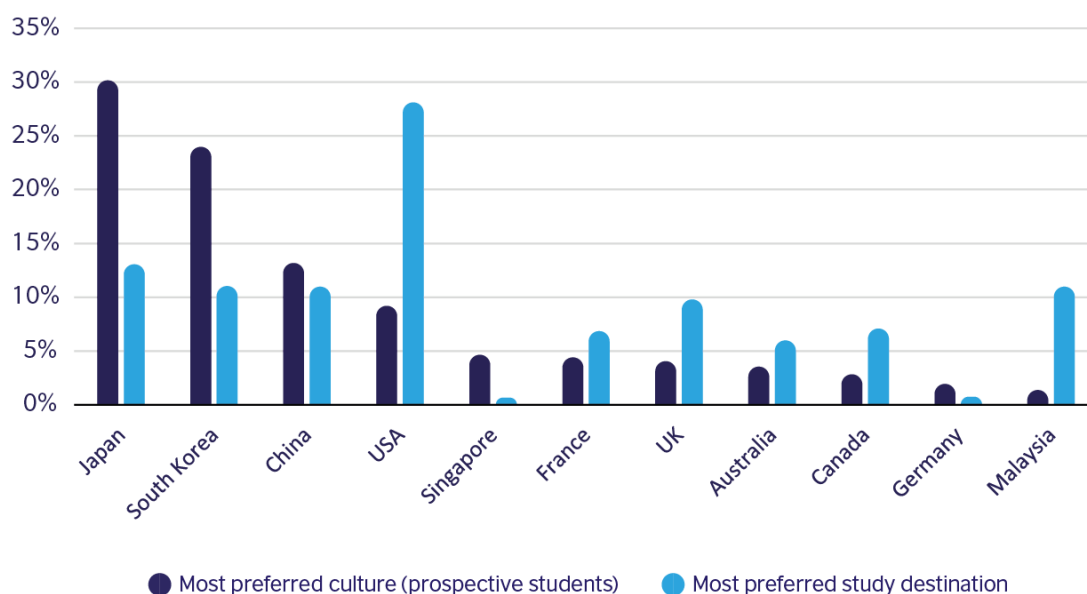
Figure 38: Students' and parents' interest in studying abroad, by level of interest in overseas culture



Base: Students (233 respondents) and parents (785 respondents)

In focus group discussions, students and their parents described culture as having a moderate impact on their interest in studying abroad. Factors mentioned included the behaviour of the local students and lecturers and attitudes towards foreigners, especially how well foreign students can communicate and socialize. However, the educational institution's quality / ranking and other factors such as employability were described as clearly more important.

A comparison between students' top preferred countries in cultural terms and their preferred study destinations shows that the UK is distinctly more popular as a study destination compared to preference for the country in cultural terms. Among students who expressed an interest in studying abroad, only 4 per cent named the UK as their preferred overseas culture compared to 10 per cent who saw the UK as their most-preferred study destination. Other countries had similarly large gaps – the US was three times as likely to be named as a preferred study destination compared to the share of students who saw it as the most attractive country in cultural terms, while Japan and South Korea were both much less attractive as study destinations than in terms of culture.

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

Base: Students interested in studying overseas (141 respondents)

When discussing the importance of culture in overseas business cooperation, focus group participants again said that other factors were more important but that culture did have some level of influence. The most important cultural factors were the behaviour and attitudes of locals, including their sincerity, transparency, honesty and attitudes towards work. Cultural similarity with Thailand was also an important issue, with participants saying that similarities with China meant that there was a “*sense of familiarity*” when doing business in the country, or that understanding local culture would lead to easier communication with local people.

Culture was described as being comparatively more important when considering visiting a country for tourism purposes. Focus group participants agreed that history, lifestyles, tourist attractions, food and other aspects of the country’s culture make up an important element of their decisions, with some mentioning that they would like to go to “beautiful places” that they had seen in movies while a participant working in the hospitality industry commented that “*culture is one of the products – people pay for it to get experience and create value for themselves*”. A country’s “rich heritage and culture” was also regarded as relatively important by survey respondents, with 36 per cent of this group naming this among the most important factors when considering overseas travel options.

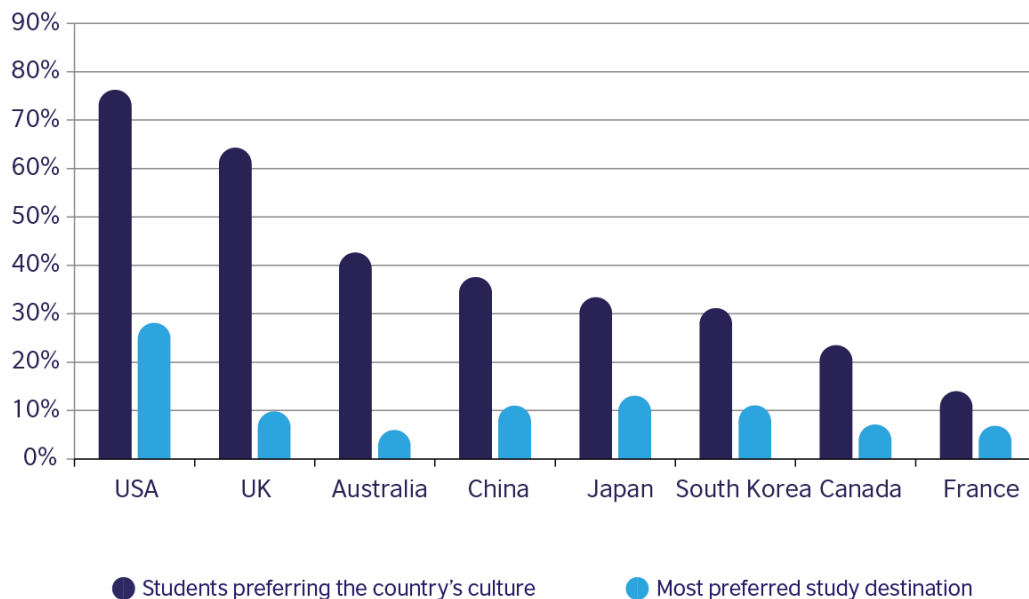
When it comes to long-term overseas residence, younger groups were more likely to describe culture as important to their choice than older Thais. As with business, personal interest in a country’s culture was generally seen as less important than aspects such as local people’s values and behaviours and attitudes towards foreigners, which were described by focus group participants as being among the most important factors when considering living or working abroad for an extended period.

Returning to the subject of education, although as noted above cultural interest was not described as one of the most important factors when prospective students were asked

about the factors that determined their choice of country, a deeper analysis of survey responses shows that this factor does appear to have a strong impact on their choice of country in which to study.

Among students who expressed an interest in overseas study, those who named any given study destination as the country whose culture they found most attractive were substantially more likely to say that they wanted to study in this country than those who had a different cultural preference. Overall, 35 per cent named the same country as their preferred choice for both culture and education – not a majority but far higher than would be expected by chance.

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



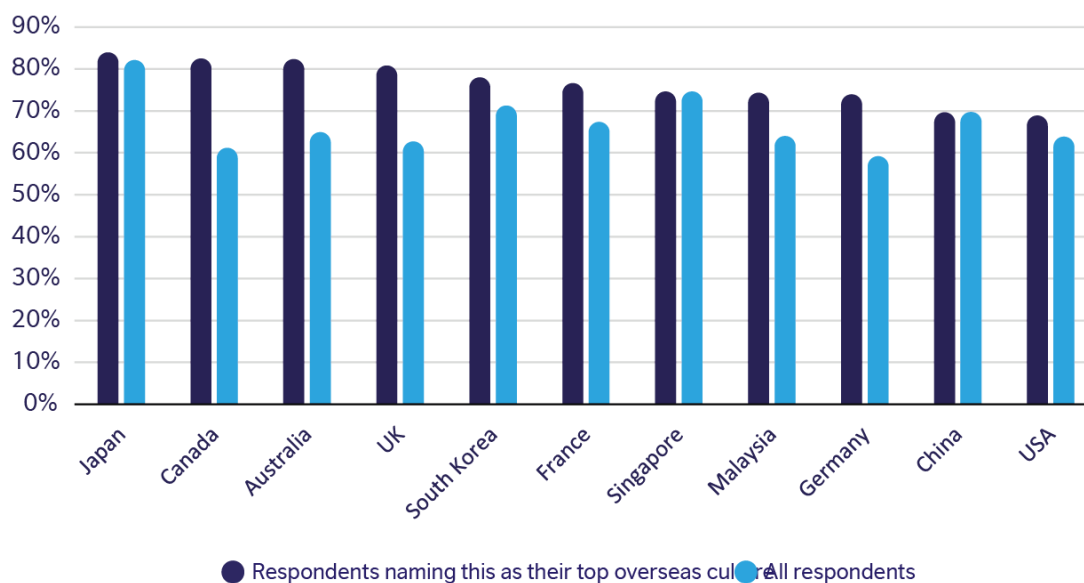
Base: Students interested in studying overseas (121 respondents)

While only a small number of prospective overseas students preferred UK culture, two thirds of this group named the country as their first-choice study destination – far above the 10 per cent of all prospective overseas students who said they wanted to study in the country. Trends were similar in other overseas countries – more than three quarters of students who preferred US culture wanted to study there compared to 28 per cent of the overall sample, and while only a third of students who preferred Japanese culture said they also wanted to study there this is substantially higher than the country's 13 per cent share among all students interested in overseas study.

If study destinations beyond the first choice are also included, students who prefer a country's culture are again substantially more likely to say that they are considering studying in that country – in the case of the UK, 90 per cent of students who prefer the country's culture and wanted to study abroad said they would consider studying in the UK, roughly double the 46 per cent of all prospective overseas students that said the same thing. The positive relationship between cultural interest and study interest applies even among respondents who did not name cultural interest as a major factor in their study decisions.

Trends are similar when survey respondents were asked about their attitudes towards visiting specific countries for tourism. For example, while 63 per cent of Thai survey respondents said they wanted to visit the UK, the proportion among those who said they preferred UK culture was much higher at 82 per cent. Results for almost all countries were in the same direction, although the size of the gap was generally larger for Western countries than for local Asian destinations.

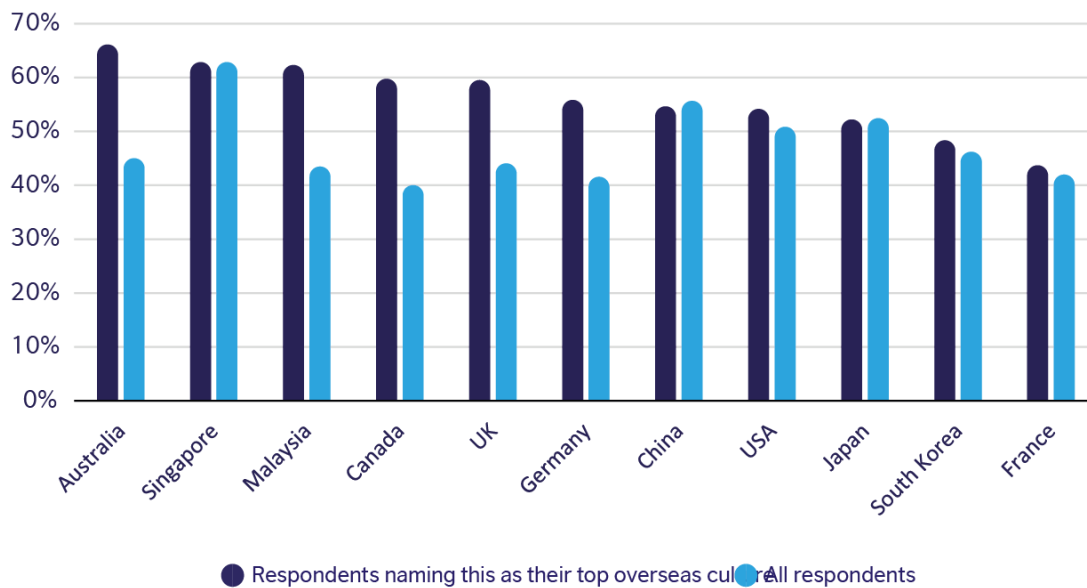
Figure 41: Interest in travelling to selected countries, overall and for Thais preferring this country's culture



Base: All respondents in Thailand (2,200 respondents)

Interest in specific overseas countries' culture also appears to have a similar effect on interest in business cooperation, despite a general perception of cultural interest as not being very important to decisions in this area. In the case of the UK, people who preferred UK culture were more likely to say they wanted to do business with UK partners by 16 percentage points – 60 per cent of this group said they wanted to do business with the UK, compared to only 44 per cent of the general survey population. Most other countries showed a similar trend, with people who were attracted to a country's culture generally more likely to want to do business with that country than those who were not.

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

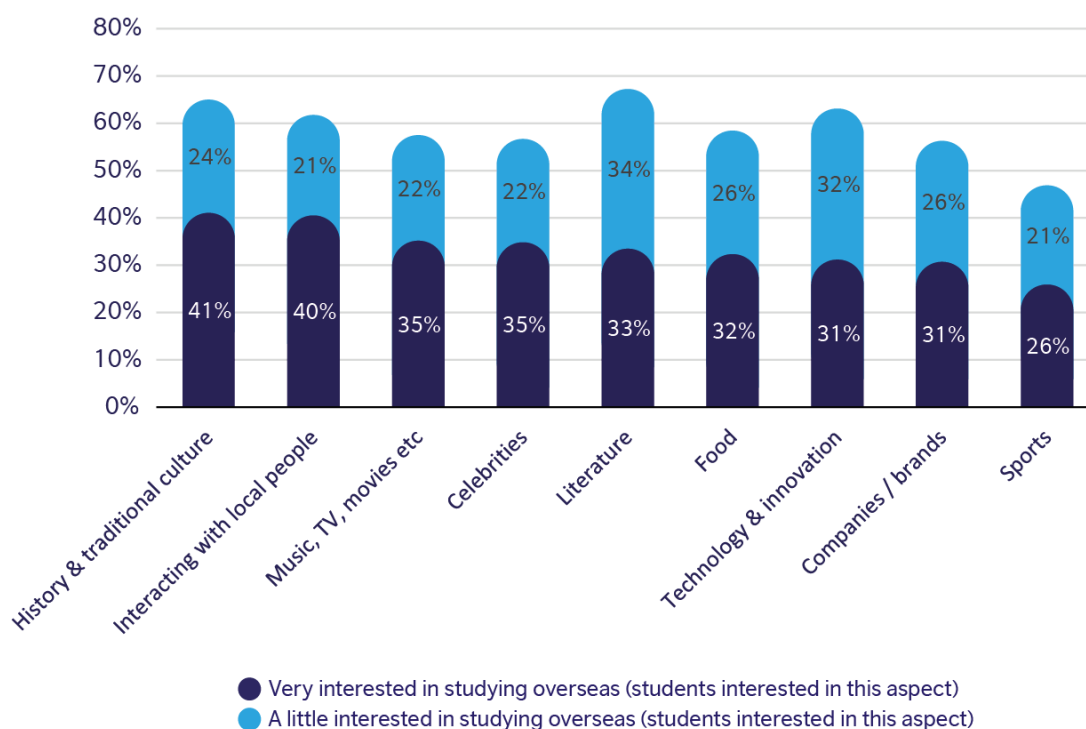


Base: All respondents in Thailand (2,200 respondents)

Similar trends also held for interest in living in different countries long-term, with even larger differences in relative terms. 48 per cent of people who said they preferred UK culture expressed an interest in living or working in the country for an extended period, well over the 27 per cent share of all survey respondents who said the same thing.⁵ Again, similar trends were apparent for almost all countries.

Interest in different aspects of overseas culture also affects the level of interest in overseas study and other forms of interaction. The most likely students to describe themselves as “very interested” in studying overseas were those that named history and traditional culture or interaction with overseas people among their top overseas cultural interests – although it should be noted that both of these groups were relatively small and so still only represent a small proportion of students wanting to study abroad. Meanwhile those who listed sports among their most-interested elements of overseas culture were the least likely to say they wanted to study abroad, either at the “very interested” or “at least a little interested” level.

⁵ As noted several times in this report, the nature of this survey means that this level of “interest” is extremely broad, and many respondents appear not to have taken practical barriers into account when it comes to expressing their preferences.

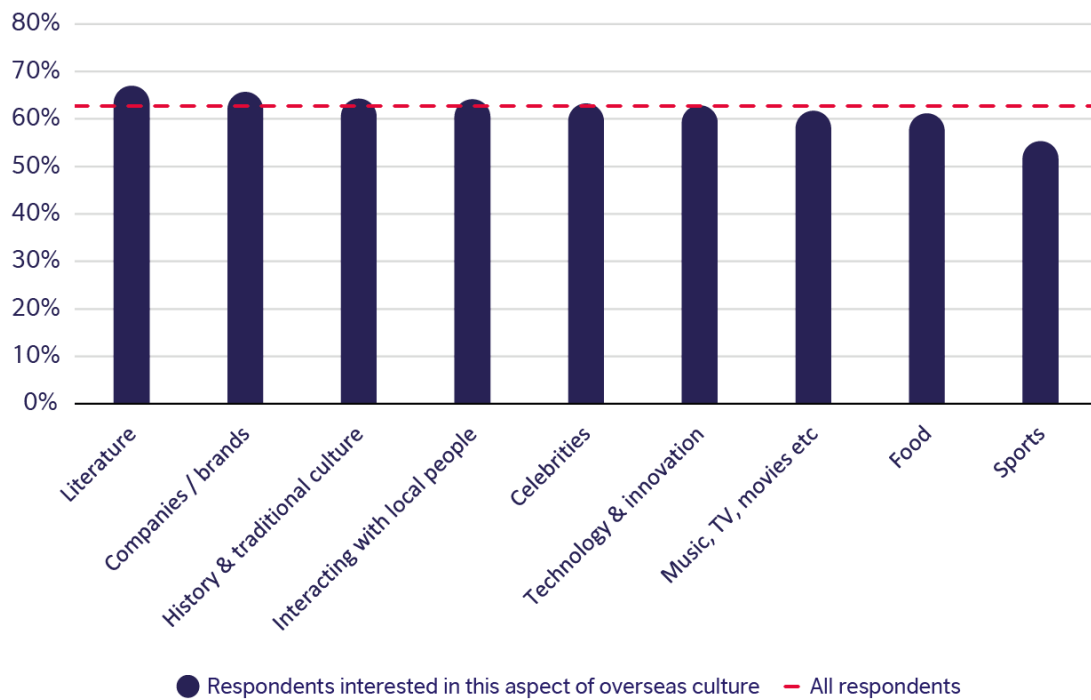
Figure 43: Students' interest in studying overseas, by interested aspects of overseas culture

Base: Students (233 respondents)

The relatively low number of students naming the UK as their preferred destination means that detailed analysis by this aspect is difficult, but survey results do show that those naming sports among their top interests in terms of overseas culture were substantially more likely to name the UK as their preferred destination, while those who said that celebrities or technology were important were less likely than average to want to study in the UK. Looking at other countries, the US was the most popular destination amongst most groups but those who named celebrities as their main interest were more likely to choose South Korea, while Japan stood out as particularly attractive (although still behind the US) among those who expressed an interest in technology.

Beyond attitudes, there is also a strong connection between physical visits and interest in studying in a country. Among prospective overseas students who had visited the UK, the proportion naming this country as their preferred overseas study destination was roughly double the proportion across all prospective overseas students, while a similar trend also applied for most other overseas countries.

Thai people's interest in travelling to the UK also varied slightly based on the aspects of culture people were interested in. Overall, people who named literature were the most likely to say they wanted to travel to the UK; meanwhile those who named sports had the lowest likelihood of wanting to travel overseas.

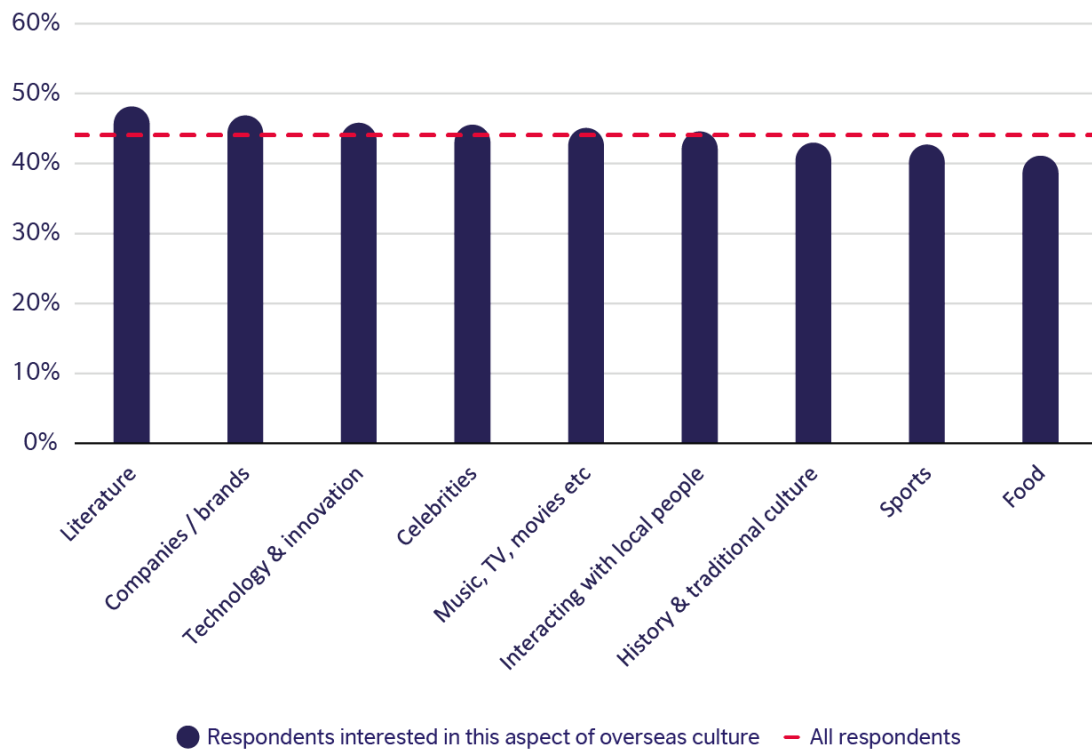
Figure 44: Interest in travelling to the UK, by interested aspects of overseas culture

Base: All respondents in Thailand (2,200 respondents)

The impact here again varied based on different countries' perceived strengths. For example, the group most likely to want to visit South Korea was those who named celebrities among their top interests.

Finally, interest in doing business with partners in the UK also varied based on the aspects of overseas culture that survey respondents found attractive, again with a generally higher level of interest in areas where the UK is regarded as comparatively strong. 48 per cent of respondents who named literature among their top cultural interests said they wanted to do business with UK partners, while those naming food were the least likely group with only 41 per cent expressing an interest in business cooperation with the UK.

Figure 45: Interest in doing business with partners in the UK, by interested aspects of overseas culture



Base: All respondents in Thailand (2,200 respondents)

5. CONCLUSIONS

This report has shown that, while Thais report a lower level of interest in overseas culture than their counterparts in other ASEAN countries, interest is still high in absolute terms. However, 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 5 per cent of respondents to a large-scale survey named the UK as having the most interesting culture among a list of overseas countries. In contrast Japan is by far the leader in terms of cultural interest, while the UK also falls behind Korea, China, the US and Singapore. Similarly, social media analysis and focus group discussions also show that most Thais do not find the UK especially attractive in cultural terms.

The general perception of the UK in Thailand is as a modern developed country but not one that especially stands out compared to other Western countries in areas such as technology or media – although the Premier League was popular and well regarded. British people were seen as polite and disciplined, but also somewhat arrogant and inflexible.

Another advantage of the UK is the country's higher education system. This is particularly true among people actively engaged in applying for overseas higher education courses or who have studied abroad in the past, who discussed the UK's leading universities and strong teaching methods as well as saying that graduates' cultural markers such as the British accent would give them advantages when returning to Thailand and applying for jobs. In contrast the cost of UK study was seen as its main disadvantage.

The UK's strength as an education destination is somewhat less well known in the broader student population. Survey results showed that a large proportion of Thai students said they would be interested in studying abroad, with around a third describing themselves as "very interested" and almost 60 per cent saying they were at least a little interested, but only around one in ten prospective overseas students named the UK as their preferred study destination.

As with their counterparts in other ASEAN countries, most Thais did not describe cultural interest as being among the most important factors when it comes to their decision to study overseas, their choice of study destination or their attitude towards overseas business. However, indirect evidence from survey results showed that attitudes towards overseas countries' culture could have a stronger effect than these answers may suggest, both in Thailand and elsewhere in the ASEAN region, with strong connections between survey respondents' answers when asked about their interest in different countries' culture and their attitudes towards studying in, travelling to, doing business with or working in those countries.

In the case of education, Thai students who described themselves as "very interested" in overseas culture were more than twice as likely to also say that they were very interested in studying abroad compared to those describing themselves as "somewhat interested", and had an even bigger gap compared to those describing themselves as

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

As noted throughout this report, readers should be aware that survey responses discussed in this report only reflect the initial stage of potential students' decision process. Data from UNESCO shows that true proportion of Thai students going abroad is far lower than the 59 per cent of students who expressed an interest in this in the survey, and 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. The proportion of Thais 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.

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