



# Measuring the cultural dividend

How does interest in overseas culture affect Vietnamese study decisions?

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## **ABOUT EDUCATION FUTURES**

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

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# 1. EXECUTIVE SUMMARY

- This report analyses the link between Vietnamese 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.
- Vietnamese people have a relatively high level of interest in overseas culture, with 83 per cent of survey respondents describing themselves as "very interested" or "somewhat interested" in overseas culture. Despite the impact of Covid-19, the majority of survey respondents said that they had become more interested in overseas culture over the previous year.
- The aspects of overseas culture that Vietnamese people are most likely to describe themselves as interested in included history and traditional culture, technology and innovation, and food.
- Female survey respondents were substantially more likely to describe themselves as interested in overseas culture, while older people and those from wealthier families also had a higher level of interest. A regional analysis shows that people living in the country's two largest cities – Ho Chi Minh City and the capital Hanoi – have the highest level of interest.
- While interest in overseas culture in general is high, most are not attracted to UK culture specifically. Only 6 per cent of survey respondents chose the UK as their preferred overseas country in terms of culture, far below the proportion who named Japan or Korea and ranking 6<sup>th</sup> overall from a list of 11 overseas countries.
- In general, Vietnamese people describe the UK as a modern developed country whose people are polite and courteous but also reserved and somewhat conservative. The country's higher education system is well regarded but most people in Vietnam have little awareness of British media such as films, music and TV shows, while the country is not regarded as having a particular advantage in technology or innovation compared to other developed countries.
- Vietnamese students report a high level of interest in overseas study, with over 40 per cent of students describing themselves as "very interested" and another fifth saying that they are at least a little interested in overseas study. Students from higher-income families and from Hanoi and Ho Chi Minh City have an even higher level of interest, while a very large majority of parents said that they were interested in studying abroad.
- However, the proportion of Vietnamese students actually going abroad to study is far lower than the fraction of survey respondents expressing interest in this

option, 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 eight students who say they want to study overseas, putting it behind Japan, Singapore and the US. 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 Vietnamese students and their parents.
- 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 four times as likely to name the UK as their first-choice destination compared to the overall group of potential overseas students.
- Vietnamese people expressed strong interest in travelling abroad once the pandemic subsides, saying that the current Covid-19 situation has not hampered their travel interest in the long term – all are ready to travel again when the world has recovered from the pandemic. A large majority described themselves as potentially interested in visiting the UK, while also saying similar things about other countries; as with study preferences those that said they preferred a country's culture had an even higher likelihood of wanting to travel there. There is a similar effect on attitudes towards overseas business and living and working overseas for a longer period – a higher level of cultural interest is connected to an elevated level of interest in these forms of engagement, while a preference for UK culture is also linked to a higher likelihood of wanting to engage with the UK in particular.
- The link between interest in a country's culture and preference for that country as a study preference means that Vietnamese people's low level of interest in UK culture is likely affecting attitudes towards UK study in a negative way. The higher level of interest in the UK among groups that are more engaged in 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 do they mean?*

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

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

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

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

- Analysis of user-generated posts on social media, especially Twitter posts as well as public posts on other networks including forums, blogs, comments on relevant news sites and other sources
- A large-scale online survey distributed in early 2021
- Online focus groups with Vietnamese 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 12,591 posts 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 Vietnamese people and were further weighted to reflect the country's demographics, taking into account factors such as gender, age and region. A total of 1,800 responses were received in Vietnam, as part of a total of 13,200 responses across all six target ASEAN countries.

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

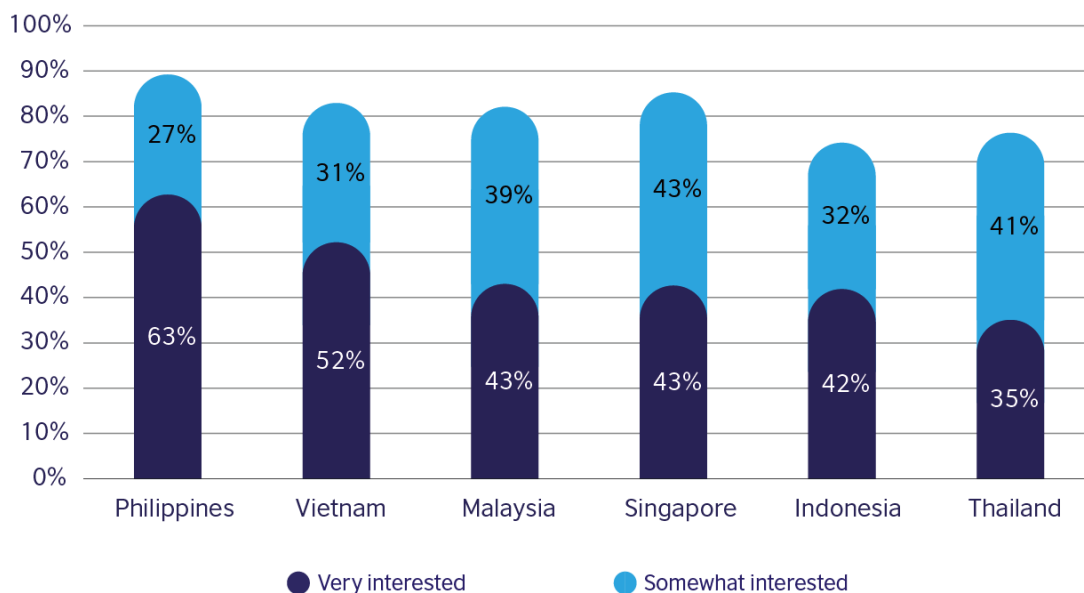
## 3. VIETNAMESE PEOPLE'S INTEREST IN OVERSEAS CULTURE

### 3.1 Level of interest in overseas culture

Based on a large-scale survey of 1,800 Vietnamese people, 52 per cent described themselves as “very interested” when they were asked a broad question about their level of interest in overseas culture, while a total of 83 per cent described themselves as at least “somewhat interested”.

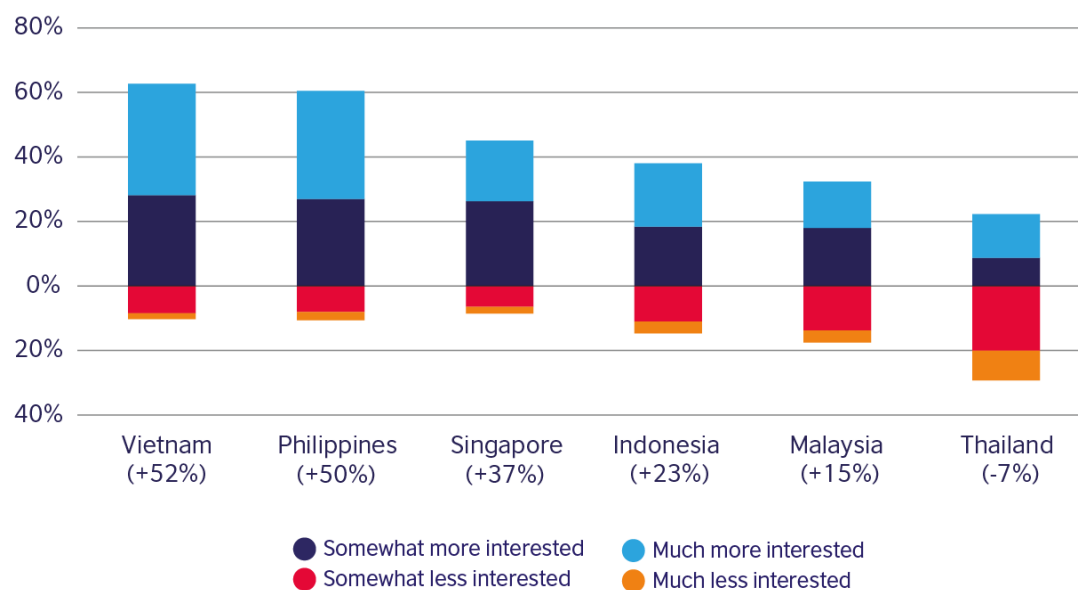
This level of interest was above the ASEAN average in both cases, being second only to the Philippines in terms of the number of people who were very interested in overseas culture and third overall in terms of the number who were at least somewhat interested.

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



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

The surveys – carried out in early 2021 – also asked about the change in respondents’ attitudes towards overseas culture compared to 12 months earlier. Despite the disruption to international activities caused by the Covid-19 pandemic, Vietnamese people reported a very positive shift in their attitudes, with more than 60 per cent saying they have become more interested in overseas culture over that period while only one in ten reported a negative change. The net positive shift in Vietnam was higher than in any other ASEAN country.

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

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

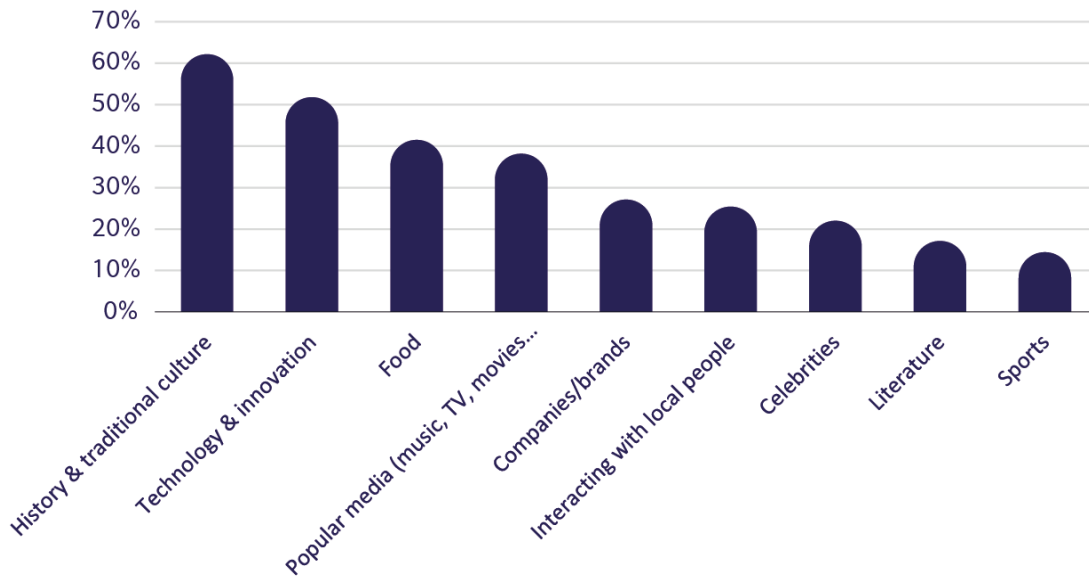
Focus group discussions with people in Vietnam – including groups of parents, of prospective overseas students, of returned overseas alumni and of young people – show that the things Vietnamese people associate most strongly with overseas culture are traditions and customs, such as festivals, religion and food. They also strongly associate overseas culture with human factors such as peoples’ behaviour, attitudes and values, and with people’s living patterns and habits such as work-life balance, working style and living quality.

As with other ASEAN countries, the country at the top of most Vietnamese people’s mind when they were asked about overseas culture was Japan, with other countries strongly associated with culture including the UK, “European countries” such as Germany, France and the Netherlands, and the United States.

In line with this concept of overseas culture, when Vietnamese people were asked about the aspects of overseas culture they found most interesting the top response was history and traditional culture. 62 per cent of survey respondents named this among their top three aspects of overseas culture, followed by technology and innovation with 52 per cent, food with 42 per cent, and popular media such as music, film and television which was named by 38 per cent of respondents. Among the nine areas listed in the survey, the least popular were sports and literature which were named by 14 and 17 per cent of survey respondents respectively.

Some aspects, such as history & traditional culture and interaction with local people and literature, were relatively more popular among respondents that described themselves as interested in overseas culture, while others, including media (music, film and TV) and sports were more likely to be named as top-three aspects among people who said they were comparatively less interested in overseas culture.

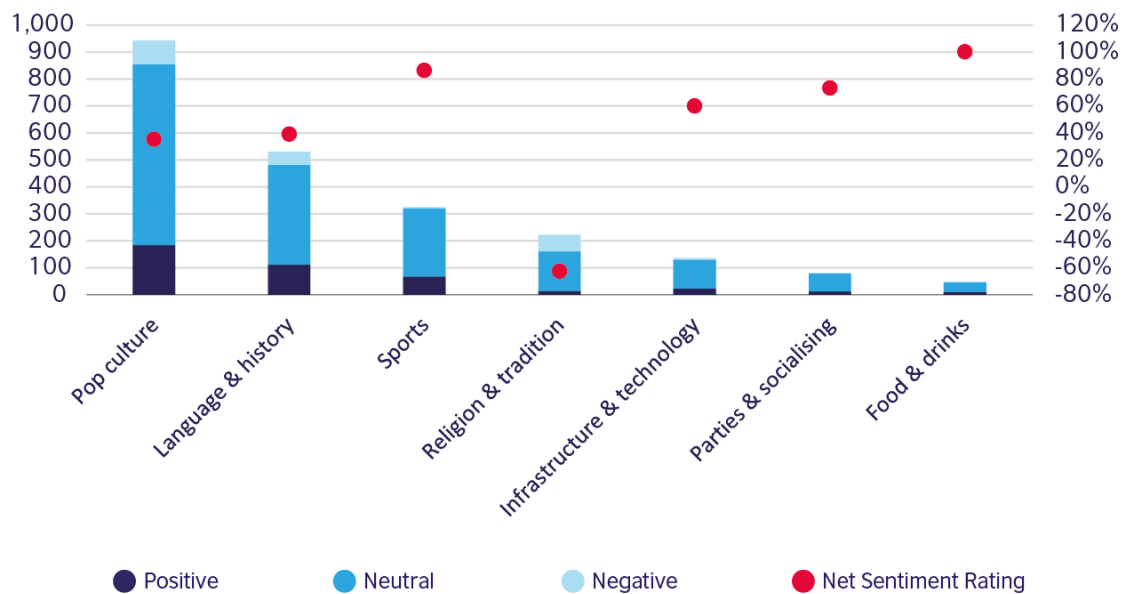
**Figure 3: Interest in different aspects of overseas culture**



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

However, analysis of Vietnamese social media discussion shows that popular culture such as movies, TV and music made up the largest share of online discussion related to three major overseas countries: the UK, the US and China. Discussion of overseas language and history took second place, ahead of sports which accounted for the third largest share of discussion tagged as related to these countries' culture on social media, blogs and forums.

**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

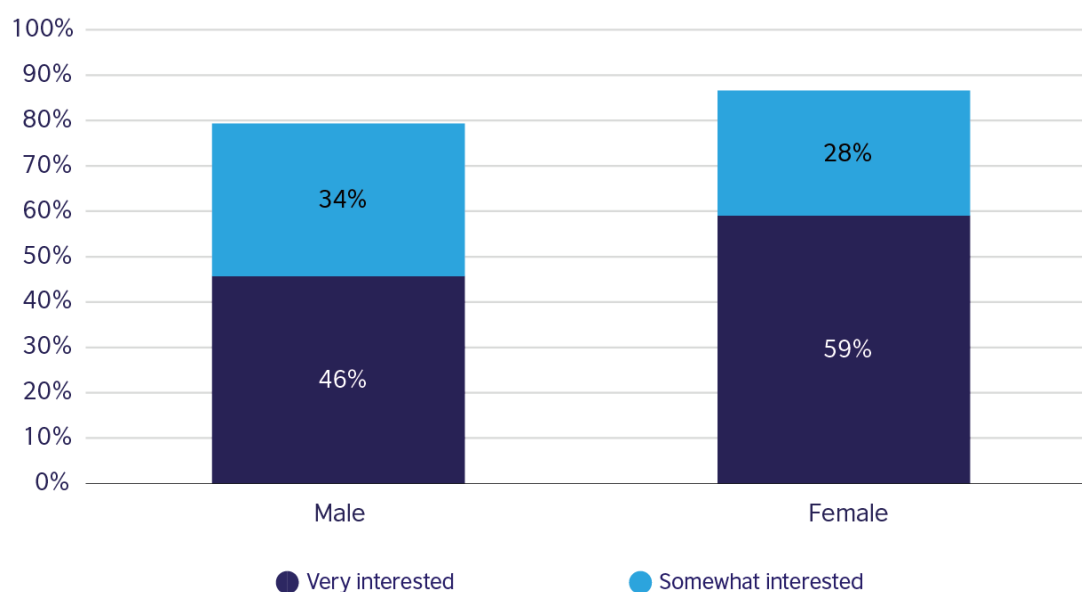
Analysis of the sentiment of these posts shows that discussion of overseas countries' food was virtually entirely positive or neutral, while discussion of overseas sports was also highly positive with a net sentiment ratio – defined as the number of positive posts minus the number of negative posts, divided by the combined total of positive and negative posts – of 86 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

Several demographic factors have a large effect on Vietnamese people's interest in overseas culture.

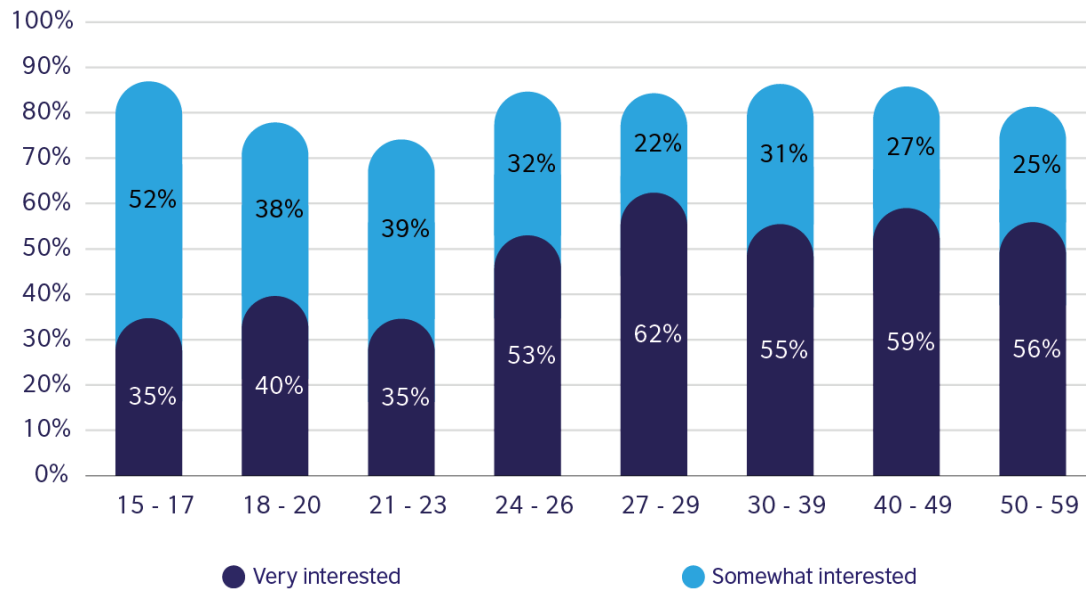
Dividing survey respondents by gender shows that overseas culture is much more attractive to female Vietnamese people than to their male counterparts. A strong majority of 59 per cent of female survey respondents described themselves as “very interested” in overseas culture compared to only 46 per cent of males, while the corresponding figures for people saying that they were at least “somewhat interested” were 87 per cent and 79 per cent respectively.

**Figure 5: Interest in overseas culture by gender**



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

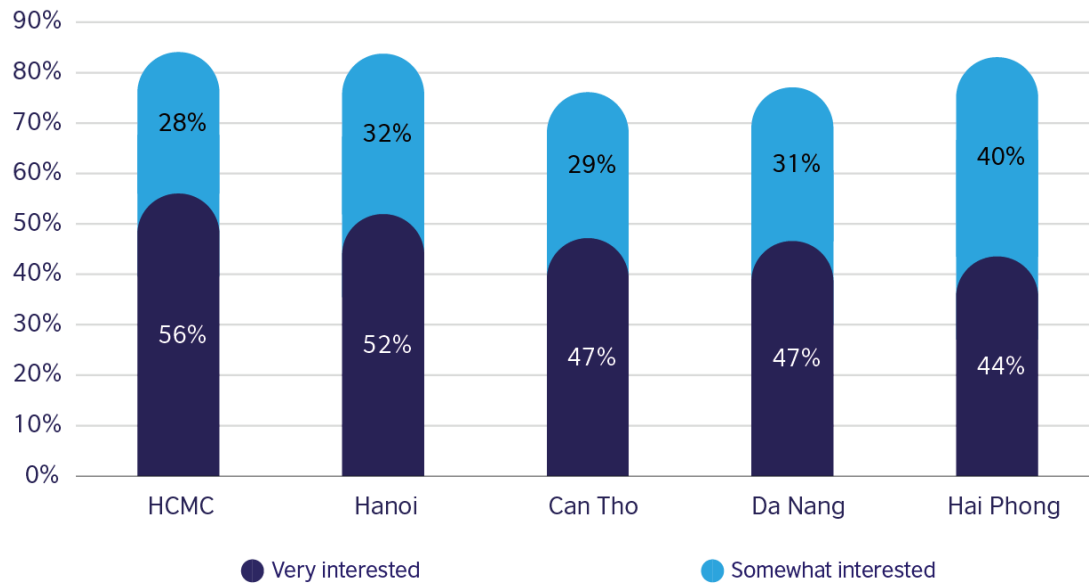
Variation by age shows a broad tendency for older people to express a greater level of interest in overseas culture. There is a noticeable difference between teenagers and people in their early 20s – where all groups had between 35 and 40 per cent of survey respondents saying they were very interested in overseas culture – and people in their late 20s and beyond, where the proportion describing themselves as very interested ranged between 55 and 62 per cent. However, results were not perfectly linear and the group with the highest level of interest was people aged between 27 and 29.

**Figure 6: Interest in overseas culture by age**

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

In contrast to some other ASEAN countries the survey results did not show distinct differences between students and non-students within age bands that had substantial numbers of both student and non-student respondents – although the overall variation by age meant that non-students rated overseas culture as more attractive overall.

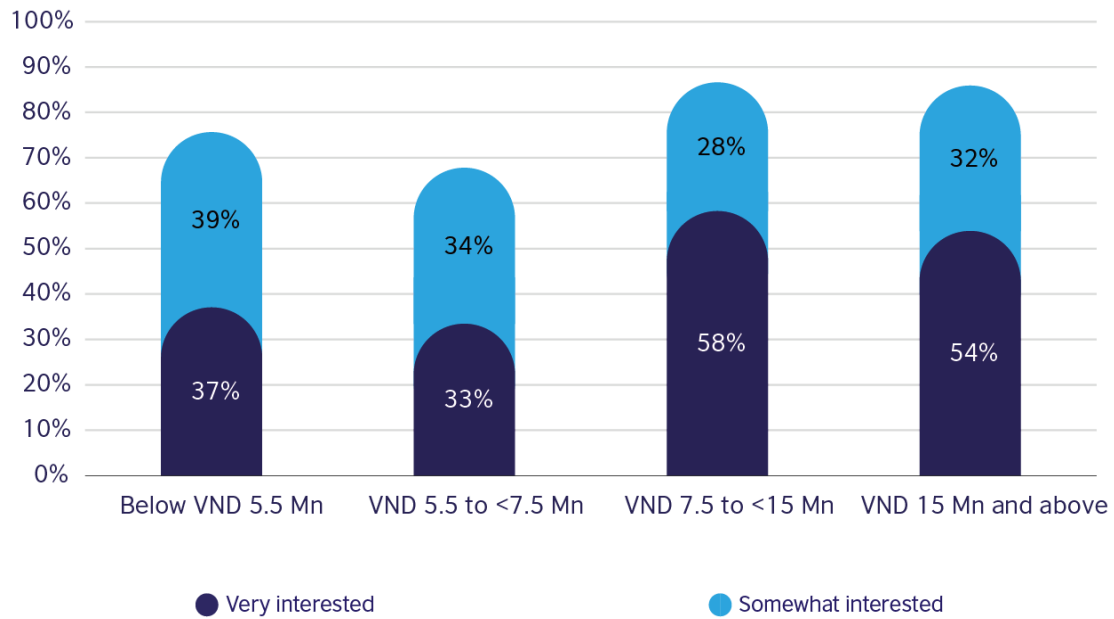
A regional breakdown shows that interest in overseas culture is highest in Ho Chi Minh City (HCMC), the largest city in Vietnam, with the country's capital and second-largest city Hanoi having the second largest proportion of people describing themselves as very interested in overseas culture. Other regions of the country had comparatively lower levels of interest, although the proportion was still relatively high compared to other ASEAN countries – even Hai Phong, which had the lowest level of interest, had 44 per cent of residents describing themselves as very interested in overseas culture.

**Figure 7: Interest in overseas culture by region**

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

Wealth is also an important determiner of interest in overseas culture – but the effect of this factor in Vietnam appears to be weaker and less consistent than in most other ASEAN countries. While in most investigated countries each household income band had a higher level of interest in overseas culture than the band below, Vietnamese respondents in the second-highest income band were slightly more likely to express interest in overseas culture than those with household incomes over VND 15 million (£480) per month, while interest in the lowest income group was slightly higher than that in the second-lowest group. Nevertheless, survey results do clearly show that respondents in the higher two income bands have more interest in overseas culture than those from lower-income families.



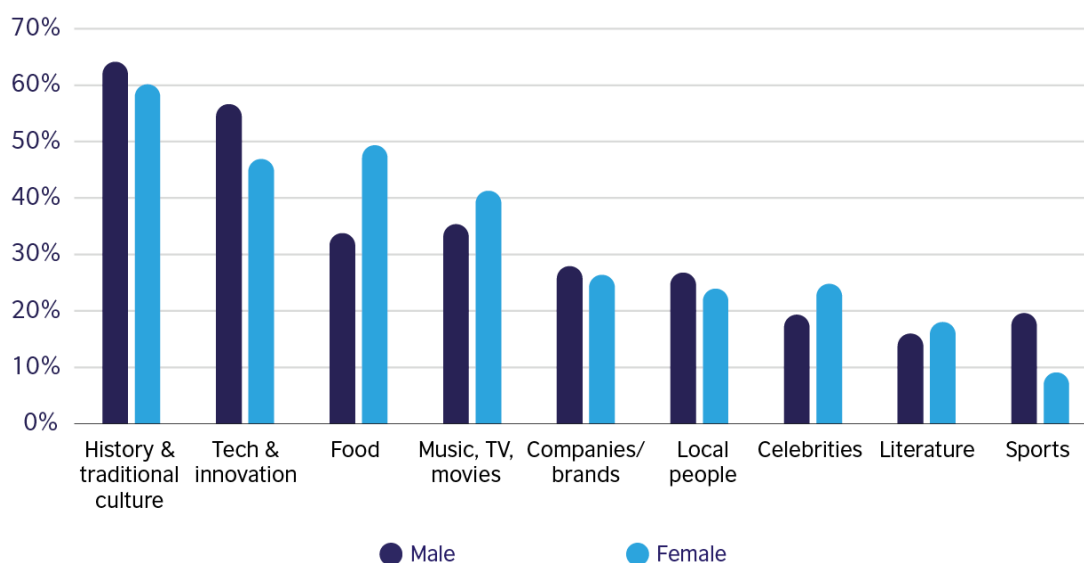
**Figure 8: Interest in overseas culture by monthly household income**

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

As noted in the previous section, the survey also asked about the extent to which their attitudes had changed over the last year.<sup>1</sup> Along with their overall higher level of interest in overseas culture, female survey respondents in Vietnam were also more likely to say that their level of interest had increased over the last year despite the Covid-19 pandemic. There was no consistent trend in answers by age or income level, with all groups giving strongly positive responses to this question – only a small minority of each category said that their interest in overseas culture had decreased over the previous 12 months.

Demographic factors also affect interest in specific topics relating to overseas culture. Gender has a strong effect, with male respondents were more than twice as likely as females to name sports among their top three aspects of overseas culture, while they were also 10 percentage points more likely to name technology and innovation among the areas of overseas culture they were most interested in. Female survey respondents were relatively more likely to name food, celebrities and popular media among their top overseas cultural interests.

<sup>1</sup> As noted in previous sections, the survey was conducted in early 2021

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

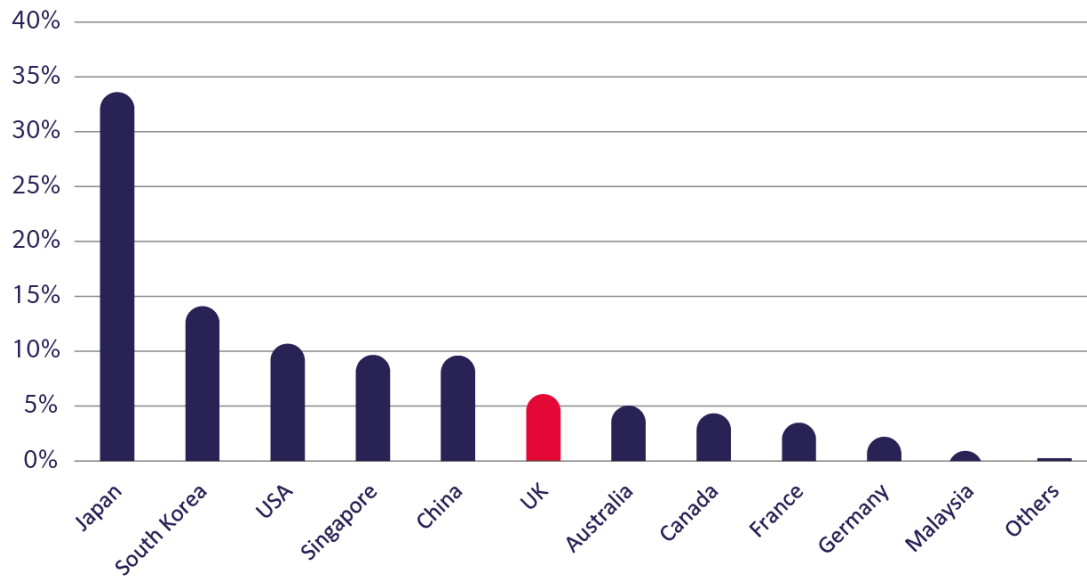
Base: All respondents in Vietnam (1,800 respondents)

Breaking down this data by age, older age groups were increasingly more likely to describe themselves as interested in overseas history & traditional culture and to a lesser extent technology and innovation, while younger people tended to have a higher level of interest in food, popular media and celebrities. Similar trends applied between wealth levels, with people from wealthier households relatively more likely to say they were interested in history and traditional culture and in technology and innovation while those with lower household incomes described themselves as more interested in popular media, sports and celebrities.

### 3.3 Interest in specific overseas countries' culture

When survey respondents were asked to name their preferred overseas country in terms of culture, Japan stood out as the clear leader. 34 per cent of Vietnamese survey respondents chose this as their most-preferred country, more than twice the 14 per cent who chose second-placed South Korea and more than three times as many as any other country.

The UK was chosen by 6 per cent of Vietnamese respondents that described themselves as at least somewhat interested in overseas culture, placing it 6<sup>th</sup> overall, slightly ahead of Australia. Aside from Japan and South Korea, the three other countries rated as more popular than the UK were the US, Singapore and China, each of which was chosen by 10 to 11 per cent of respondents.

**Figure 10: Preferred overseas country in terms of culture**

Base: Respondents at least somewhat interested in overseas culture (1,502 respondents)

Focus groups confirmed that Japan is many Vietnamese people's favourite country in terms of overseas culture. The country was described as "traditional yet modern", with locals described as respectful, hardworking and punctual. People also mentioned Japan's traditional customs, clothing and food, and beautiful natural scenery, and described the country as a leader in technology and with an attractive lifestyle.

The UK was also mentioned by focus group participants when asked about their preferred country in terms of culture, and described – along with other European countries – as being modern and developed and having a sense of order, with long history and heritage and with many ancient sites and buildings. These countries were described as having a more leisurely lifestyle with a better work-life balance. The UK was also specifically mentioned as having a strong higher education system with top-ranking world universities and an emphasis on practical skills, creativity and critical thinking; attitudes towards UK education are described in more detail in Section 4.

The third country mentioned in focus groups as having an attractive culture was the United States, which was described as being civilised and advanced, with an emphasis on freedom and ethnic diversity. The US was also mentioned as the world leader when participants were asked about foreign countries' strength in technology and innovation, and alongside South Korea as a leader in the media field.

When focus group participants were specifically asked about their attitudes towards the UK, the strongest association was again education, with the UK described as being known for world-renowned universities and a quality education system more broadly. Another strong impression of the UK was as a developed country with a long heritage and having strong worldwide political influence as well as a mix of modernity with tradition.

A third major perception of the UK among Vietnamese people was as a country of “gentlemen”, with an emphasis on being polite and courteous, but also as a country where people tend to be more conservative and reserved and being hard to make emotional connections with. Perceptions of people from the UK and other countries are discussed in more detail in Section 3.5.

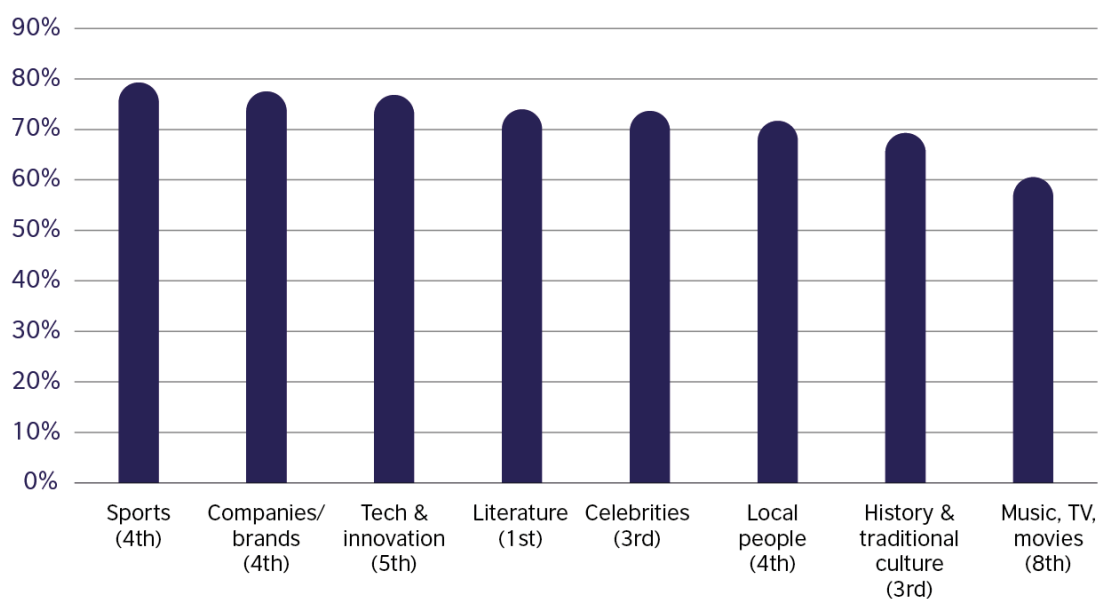
Aside from these factors, the UK is known as the origin of the English language, but less positively for its climate. Other associations with the UK include the royal family, the Premier League, Margaret Thatcher and “high tea culture”.

The UK was not mentioned when Vietnamese people were asked about countries that were strong in media or in terms of technology and innovation.

When survey respondents were asked about the attractiveness of countries in terms of different aspects of overseas culture, Japan again came out as the strongest performer. Respondents rated this as the strongest country in terms of four of the eight fields that were asked about, including technology and innovation, popular media, sports, and companies and brands.

The UK was rated as the most attractive overseas country in one area, literature, while South Korea was seen as the leading overseas country in terms of celebrities and the US was the most likely to be described as attractive for interaction with local people. China and France were equally likely to be described as countries that were attractive in terms of history and traditional culture.

Aside from literature, the UK also performed comparatively well in terms of its history and traditional culture and in terms of its celebrities, being ranked third across a total of nine overseas countries in each area. The UK’s relative performance was weakest in the area of popular media, where the country ranked 8<sup>th</sup> with 61 per cent of people describing the country as attractive in this area.

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

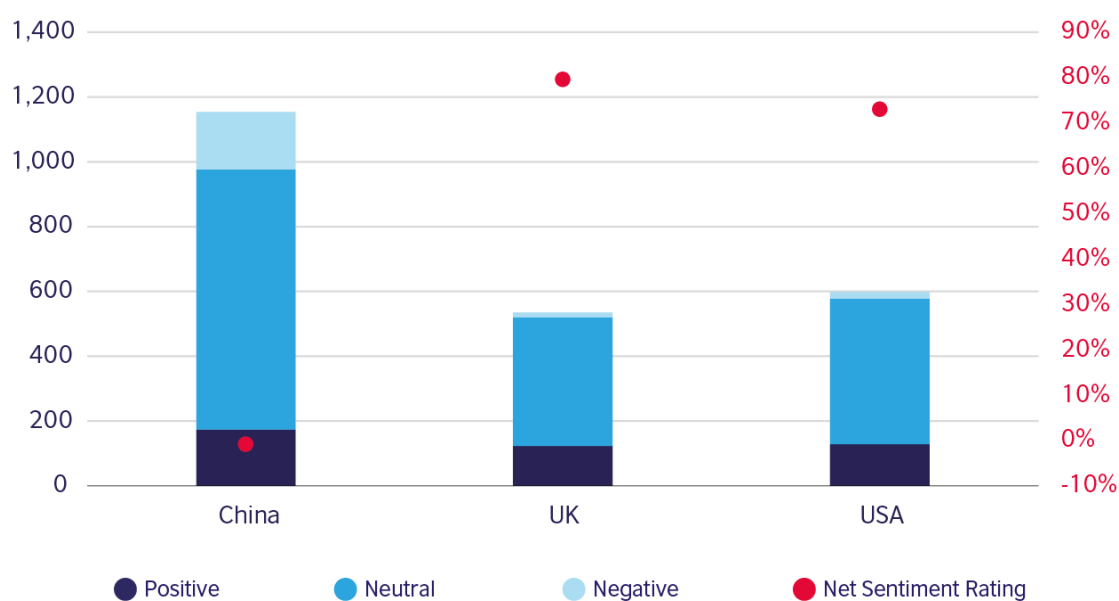
Base: All respondents in Vietnam (1,800 respondents)

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
<b>Language &amp; History</b>	English/Chinese as a necessity/skill for Vietnamese people; History of UK/USA/China in context of its cultural value/prospects
<b>Pop Culture</b>	Arts, Films, Music, Celebrities, Fashion, etc. that are of intrigue and representative of the destination country
<b>Infrastructure &amp; Technology</b>	Opportunities, amenities, comforts, modernity, public systems
<b>Religion &amp; Tradition</b>	Religious expression, local traditions, folk culture, festivals, heritage
<b>Sports</b>	Sports clubs/teams & sporting culture
<b>Parties &amp; Socializing</b>	Socializing and networking in a new society; meeting locals
<b>Food &amp; Drinks</b>	Local cuisines, nostalgia about Vietnamese food; drinking culture

The volume of discussion of UK culture on social media was lower than that for either China or the United States, with China attracting more posts than the UK and US combined. However, an analysis of the sentiment of these social media posts showed that posts related to Chinese culture were more likely to be negative than positive, while posts about the UK or US had a much higher proportion of positive-sentiment posts.

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



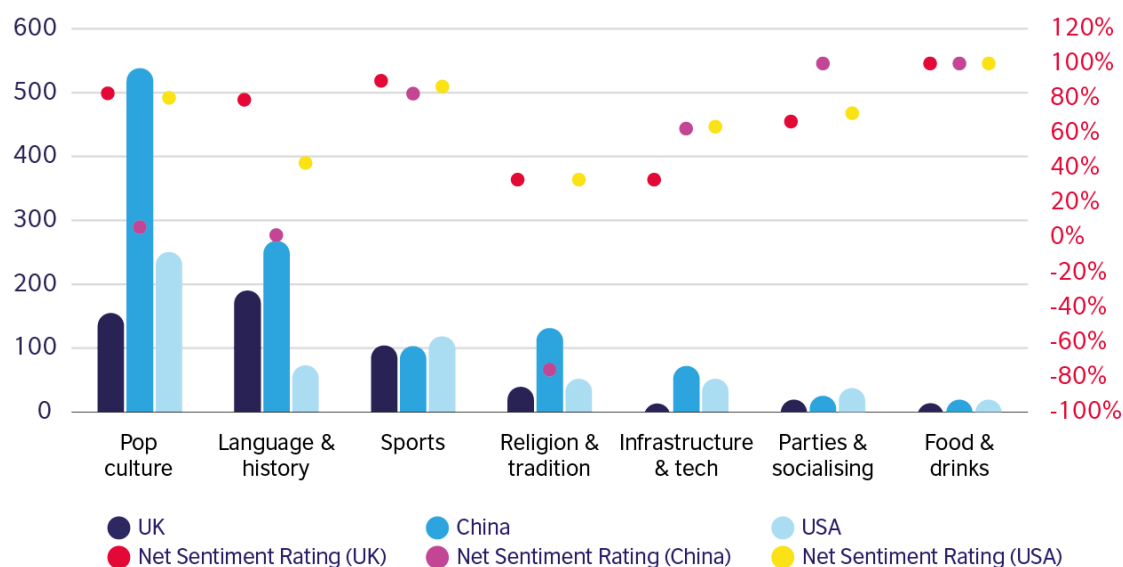
*Base: Social media posts discussing the UK, US or China in terms of culture, June 2019 – March 2021*

The most common topic of discussion related to the US and China was popular culture including movies, music and TV shows among other related aspects. Discussion of popular culture in the UK and US was generally positive and related to issues such as the quality of films or celebrity gossip, while China-related discussion included significant levels of negative sentiments due to issues like nationalist films related to conflicting territorial claims in the South China Sea, copyright infringement by Chinese fashion artists. Other negative discussion in the context of a Chinese variety show using traditional Vietnamese music in a way seen as cultural appropriation has been classified under the Religion and Tradition category.

Language and history was the most popular cultural-related topic in social media discussion of the UK, including interest in learning English and the British accent. Discussion of China in this area was more negative, mainly due to the influence of history and politics.

Sports were also a popular subject of discussion, which for the UK mainly included discussion about the Premier League. Vietnamese people also discussed different American sports like the NBA, MLS & MLB as well as a few mentions of Chinese football and e-sports which generated positive sentiment.

**Figure 13: 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

As noted above, Vietnamese focus group respondents' strongest association with the UK was as a leading country in the field of education. The country is famed for its top world-ranking universities as well as a strong higher education system more broadly, which was described as having an emphasis on practical skills, training students to be creative and critical thinkers, and having quality syllabuses and facilities. The US and Australia were also described as having strengths in this area. Attitudes towards overseas education are discussed in more detail in Section 4.1.

The UK was also described in positive terms as being a modern developed country, which led to several other advantages including economic strength, good infrastructure, global political influence, and an attractive lifestyle which allows people to have a good work-life balance where they “do not need to strive tirelessly”.

Other countries were described as having different strengths in terms of lifestyle. Singapore, Japan and Korea were all praised as highly developed and modern Asian countries with clean environments, while Finland, Switzerland and Norway were named as safe and highly developed nations known for high quality social welfare for their citizens. Focus group participants viewed their own country as somewhat less developed and orderly than other countries, but described Vietnam as having a “sense of harmony and peace” and close family ties.

The UK's natural landscapes were also described as an advantage for the country, as well as its famous historical sites. Meanwhile the UK was seen as having polite and courteous people. Sports leagues (especially the Premier League), the royal family and the English language were all also described as important UK advantages.

Other countries were described as having different strengths. When Vietnamese people were asked about countries with strengths in the media sector the top answer was South Korea, which is known for its actors and singers. Focus group correspondents commented that strong publicity over the years and high government investment had not only made the country's music, TV dramas and movies popular but also created high interest in traveling to Korea to experience its culture. Vietnam's own music scene was described as mimicking South Korean but being "*not as high quality*".

The US was also known for its strength in movies, with quality technical aspects such as sound and special effects, interesting storylines and famous actors. The American music industry was also highly respected. Meanwhile Chinese TV series were mentioned by several participants, all of whom were young people, as having interesting contents and "decent" special effects.

The UK did not stand out as having particular strengths in the media field, with most people not being familiar with any UK media. The general perception when asked about this directly was that UK media was similar to that of the US but not as advanced, although some were familiar with classic UK content.

In contrast to overseas countries, local Vietnamese media is seen as still developing – tending to focus on historical series with lower quality effects and known for its censorship of sensitive content.

The US was also described as having strengths in IT and innovation, with advanced infrastructure to boost industries in consumer products, military and space exploration as well as being the home of popular platforms like Netflix. China was named as another country having strong advantages in this area, showing rapid advancement in recent years and being good at mimicking other countries' technologies and producing quality products.

Other countries described as having advantages in technology included Japan – which was seen as having particular strengths in robotics – and Germany, with a long history of mechanical advancement, especially in automobile engineering.

However, the UK was not seen as synonymous with advancement in technology and innovation. Although focus group participants admitted that the country was "more developed than Vietnam", this was not seen as a great achievement as they described their own country as "many years behind" other countries due to lack of investment.

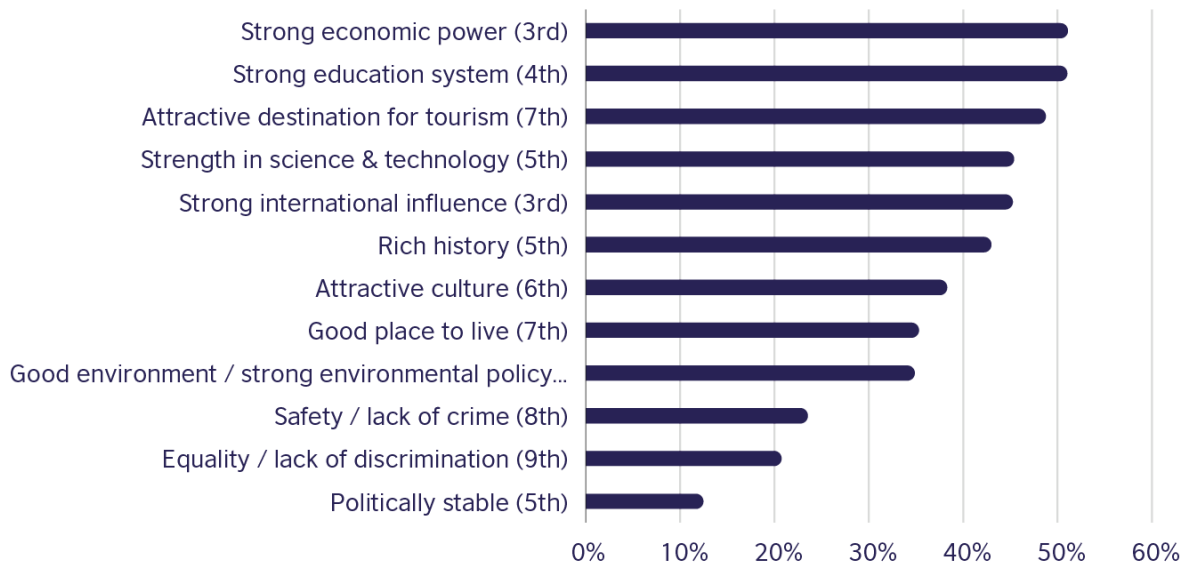
These perceptions were broadly confirmed by survey results. Vietnamese respondents were asked about their agreement with a range of statements about countries' advantages, with the UK seeing the highest agreement with statements that the country had strong economic power and a strong education system, with 51 per cent agreement on each of these questions. The UK ranked 3<sup>rd</sup> and 4<sup>th</sup> respectively among 11 countries on these questions, while also ranking 3<sup>rd</sup> on the question of whether strong international influence was an advantage for the country.

Areas where the UK performed relatively weakly compared to other countries included whether safety or lack of discrimination were advantages for the country. Less than a



quarter of respondents agreed with each of these statements, ranking the UK 8<sup>th</sup> and 9<sup>th</sup> among 11 countries respectively.

**Figure 14: Perceptions of UK strengths**

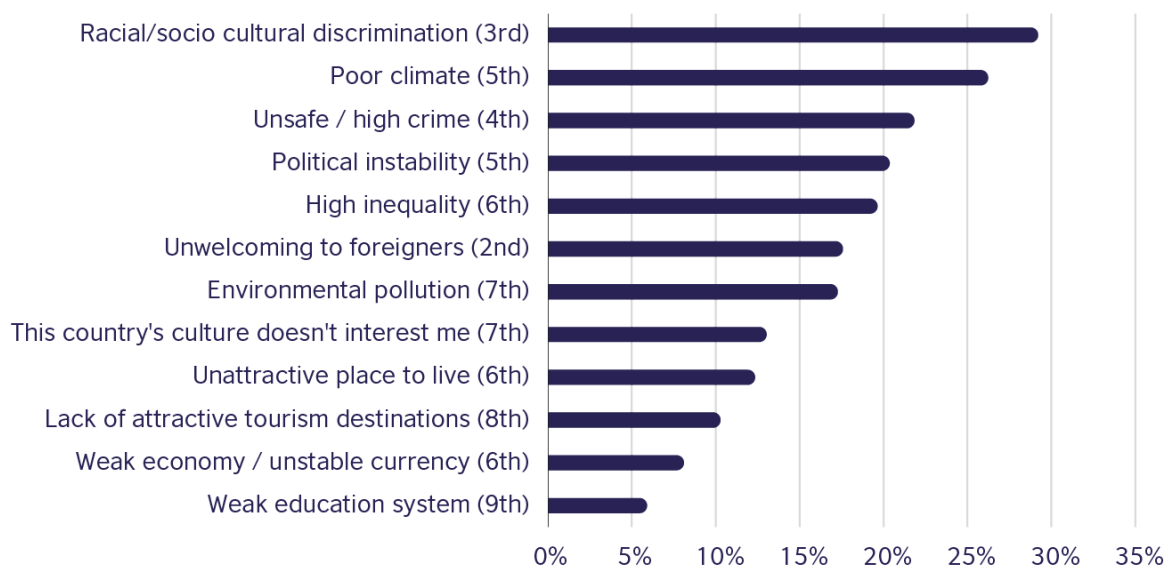


*Base: All respondents in Vietnam (1,800 respondents)*

Vietnamese people did not describe the UK as particularly weak in any field, although they saw the country as not being as strong as the US or Japan in areas like technological development and popular media.

When instead asked about UK weaknesses, the only two major negative aspects of the country discussed by focus group participants were the weather and people's personalities. The UK's climate was described as "cold and misty" while British people were described as "more conservative and reserved", which is seen as a barrier to forming connections.

Survey responses gave a similar result, with only relatively small minorities of people agreeing that the UK had weaknesses across a variety of key fields. The most common of these were racial or socio-cultural discrimination – where 29 per cent of people saw the UK as having a problem, more than any other country other than the US (49 per cent) and France (30 per cent) – and undesirable climate, where 26 per cent of survey respondents described as a weakness of the UK. In relative terms the UK was also more likely than most other countries to be described as "unwelcoming to foreigners", being more likely to be described this way than any other country except China.

**Figure 15: Perceptions of UK weaknesses**

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

### 3.5 Perceptions of people from different countries

As noted above, the most common perception of British people in Vietnamese focus groups was that they are courteous and polite. Participants also described the UK as having a “sense of order”.

The UK was also described as having a more leisurely lifestyle, with British people seen as caring more about work-life balance compared to Vietnamese people. Focus group participants also described British people as open-minded and liberal.

Some focus group participants saw British people as conservative and somewhat cold, commenting that it was hard to form connections with people from the UK. However, not everyone agreed – survey results show that 43 per cent of survey respondents saw British people as “friendly” and 36 per cent said they were “helpful and kind”, while only 14 per cent said that they were “uninterested and distant”.

The most popular descriptions among survey respondents were that British people are “proud of their own country” and “value their culture” – with 53 and 51 per cent of respondents agreeing with these statements respectively. Another common perception was the people from the UK are “disciplined”, which 44 per cent of Vietnamese people agreed with.

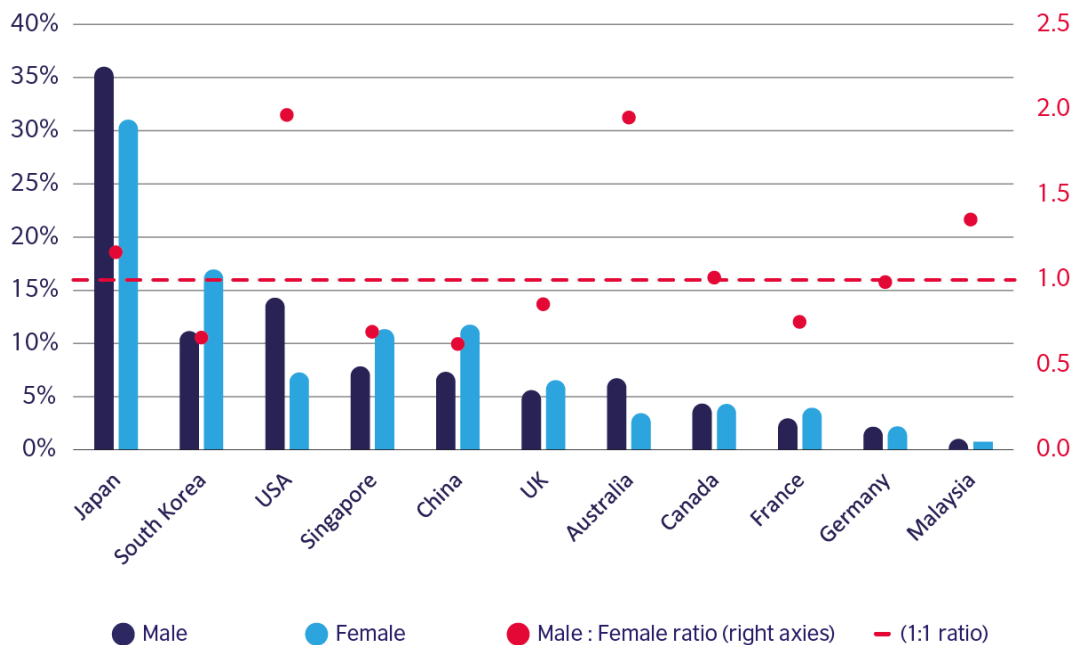
Other than people from the UK, Vietnamese people have strong impressions of Japanese people, who were described in focus groups as being respectful, diligent and hardworking, and punctual. Survey respondents agreed, with 71 per cent describing Japanese people as disciplined and 67 per cent saying they were hard-working, far more than the proportion who said the same about people from any other country. Meanwhile Americans were described as having “a sense of freedom”.

### 3.6 Factors affecting interest in different countries

As with other countries, Vietnamese people's interest in different countries varies based on a number of characteristics.

While the amount of variation by gender is smaller than in many parts of ASEAN, there are still notable gender differences in attitudes towards some countries. This is most notable in two countries: the US and South Korea. Korea was described as the most attractive overseas country by 17 per cent of female respondents but only 11 per cent of males, while the US was twice as popular among males as among females, with 14 per cent of male survey respondents naming it as their preferred overseas culture compared to only 7 per cent of their female counterparts. In comparison the UK was roughly equally popular among male and female Vietnamese people, being favoured by 6 per cent of males and 7 per cent of females.

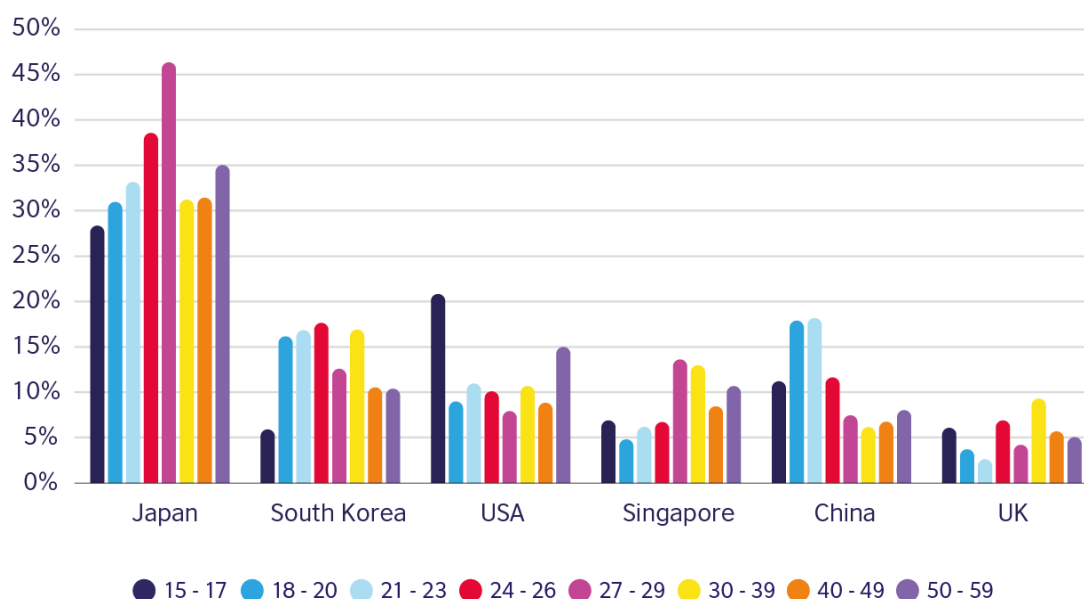
**Figure 16: Preferred overseas country in terms of culture, by gender**



*Base: Respondents at least somewhat interested in overseas culture (1,502 respondents)*

Breaking down the data by age does not show a significant trend in preference for UK culture – while some age groups have a higher level of interest than others, there is no consistent pattern. The trend in interest in South Korean culture is also much weaker than in most other ASEAN countries – while this country's culture does appear to be slightly more popular among people between their late teens and mid 20s, the size of the gap is far smaller than in other countries.

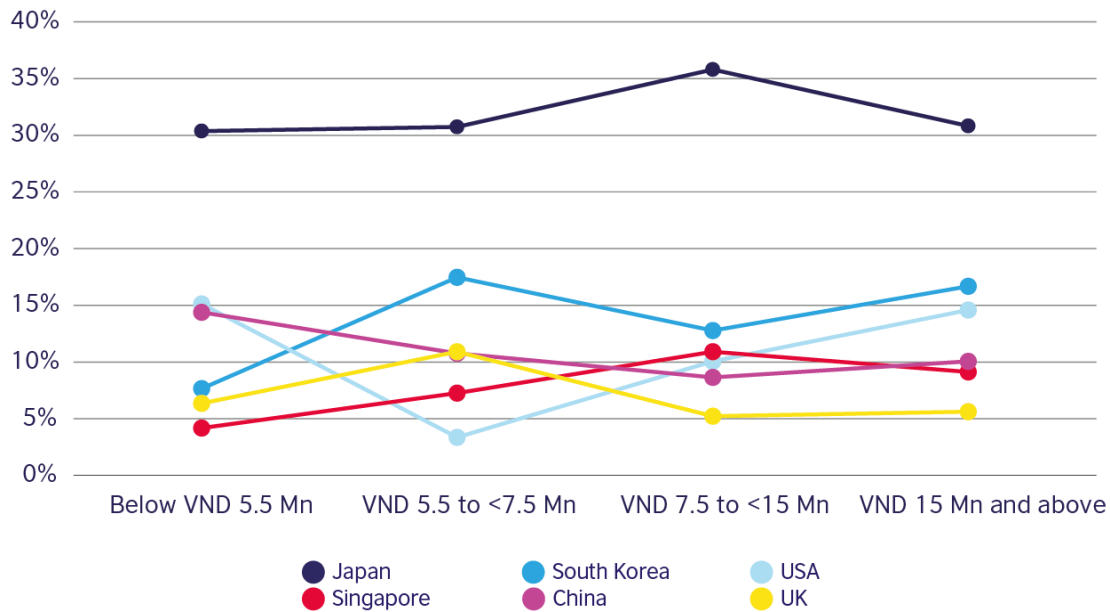
However, there do appear to be trends in interest in Chinese culture – which appears to be more popular among younger people – and in preference for Singapore, which is named by a higher proportion of people in older age groups. Japan remains the most preferred country in all age groups but interest in this country's culture is highest among people in their late 20s.

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

Base: Respondents at least somewhat interested in overseas culture (1,502 respondents)

Trends by socio-economic status are also less pronounced than those in many other parts of the ASEAN region. No country has a consistent trend of increasing or decreasing popularity in line with household income as observed in other countries, while interest in Korean culture appears to have a positive relationship with wealth which stands in contrast to the country's culture more popular among less wealthy households in most other parts of the region.

In contrast, Chinese culture has a broadly negative relationship with household income, meaning that wealthier Vietnamese people are less likely to prefer this country's culture. Data for the UK is inconclusive but weakly suggests the same pattern, having a slight negative correlation with household income.

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

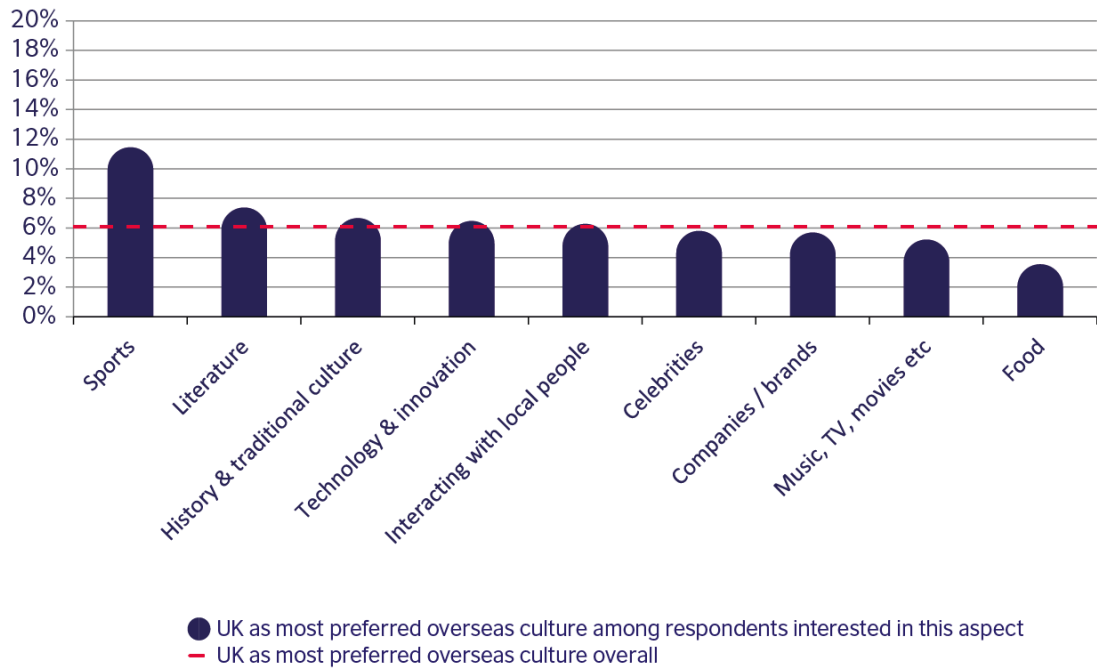
Base: Respondents at least somewhat interested in overseas culture (1,502 respondents)

Interest in specific aspects of overseas culture is also associated with differences in Vietnamese people's most-preferred country in cultural terms. People who named sports among their top three interests were the most likely to prefer the UK, followed by those interested in literature. At the other end of the scale, people who placed more importance on food and popular media were less likely to prefer the UK. These relationships match descriptions of the UK's strengths and weaknesses in surveys and focus groups.

Preference for other countries was also affected by the aspects of overseas culture that respondents found interesting. While Japan was the most likely country to be named as the favourite overseas culture across all sub-groups, this country's advantage was the strongest among people interested in technology and innovation – where 38 per cent named Japan as their preferred overseas country – while Korea performed almost as strongly as Japan among people who were interested in overseas celebrities, coming within one percentage point of Japan.

China was also particularly strong among people interested in celebrities, as well as those who named literature or popular media among their interests. Meanwhile the United States was most strongly preferred by those interested in overseas companies and brands, technology and innovation, and popular media.

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



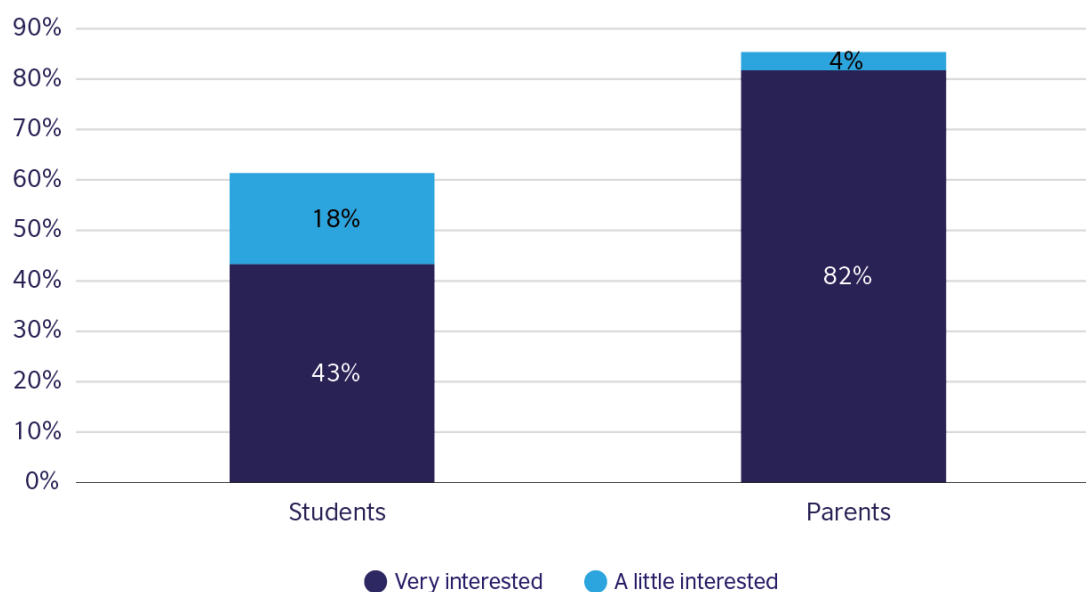
Base: Respondents at least somewhat interested in overseas culture (1,502 respondents)

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

### 4.1 Interest in overseas education

Survey results showed that 43 per cent of current Vietnamese students said they were “very interested” in studying abroad in the future, while another 18 per cent were at least a little interested. Interest among parents was substantially higher, with more than 80 per cent saying that they were very interested in sending their child to study abroad.

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



*Base: Students (335 respondents) and parents (1,054 respondents)*

While the level of interest expressed by Vietnamese students is lower than in most other ASEAN countries, it is still far higher than the proportion of Vietnamese students who actually go on to study abroad. According to data from UNESCO, around 109,000 Vietnamese students were studying tertiary programmes overseas in 2018, compared to slightly less than 2 million domestic tertiary students in 2019,<sup>2</sup> giving an outbound study rate of 5.5 per cent.

The size of this gap shows that the large majority of Vietnamese students who described themselves as wanting to study abroad will not actually go on to do so. One major reason is financial, as the tuition fees and living expenses associated with overseas study are far higher than those in Vietnam. Other reasons include the language skills needed to complete an overseas education programme and the need for students to be apart from their friends and family for a long time.

Focus group participants included prospective overseas students and their parents, alumni of overseas universities, and young people who were not selected for their interest in overseas study. Even in the latter group there was a relatively high level of

<sup>2</sup> Data is not available for domestic students in 2018 or for students studying abroad in 2019.

interest in overseas education and a perception that education in overseas countries was better than that in Vietnam. Across all groups, participants noted that Vietnam performed poorly in terms of factors like world university rankings and saw the country's education system as high-pressure and focusing too much on aspects like rote memorisation and preparation for exams rather than practical skills or creativity. One parent described Vietnamese universities as “*100 years behind*” compared to those in overseas countries.

Overseas education was also commonly linked to opportunities to live and work abroad after graduation, as well as better job opportunities if graduates returned to Vietnam. Other advantages included the opportunity to improve English or other foreign language skills – which was again seen as an advantage in finding job opportunities post-graduation – and the chance to see and experience the world outside of Vietnam. While the Covid-19 situation had delayed some focus group participants' study plans, it had not had a permanent effect on their intention to study abroad.

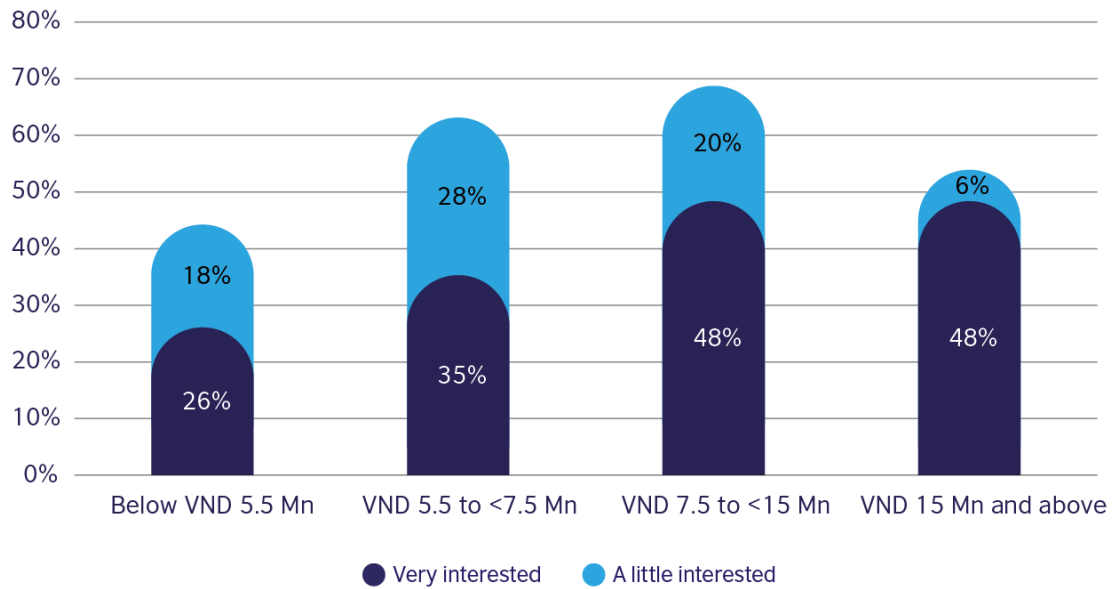
While study abroad attracted interest across all levels of study, the group with the highest level of interest was current high school students with half of 15–17-year-olds describing themselves as very interested in studying abroad compared to 37 per cent of 18–20-year-old students and 34 per cent of students in the 21–24 age group. This contrasts somewhat with data on Vietnamese HE students in the UK, where the majority of incoming students are studying at the postgraduate level with only 37 per cent joining undergraduate courses. One possible reason is that younger students have less understanding of barriers to overseas study such as cost, distance and language requirements.

However, there is very little difference between male and female Vietnamese students in terms of their interest in overseas study. 42 per cent of male students said they were very interested in studying abroad compared to 44 per cent of females; the corresponding proportions for those expressing at least some interest in overseas study were 60 and 62 per cent. While this again contrasts with enrolment data from the UK, where almost two thirds of Vietnamese HE students are female, this may be explained by a much greater preference for the UK among female students as described later in this section.

Income is also a predictor of opinions on overseas study, with 48 per cent of students who reported household incomes of VND 7.5 million (£240) per month or higher saying that they were very interested in overseas study compared to only 26 per cent of those in the lowest income band and 35 per cent of those whose families earned between VND 5.5 and 7.5 million per month. Despite these differences there was no difference between the number of students describing themselves as “very interested” in overseas study in the top two groups, and students from households in the top income band were actually somewhat less likely to describe themselves as at least a little interested in studying abroad. It is notable that even people with incomes in the highest income band of VND 15 million (£480) and above per month may find it difficult to afford overseas tuition fees in countries such as the UK.



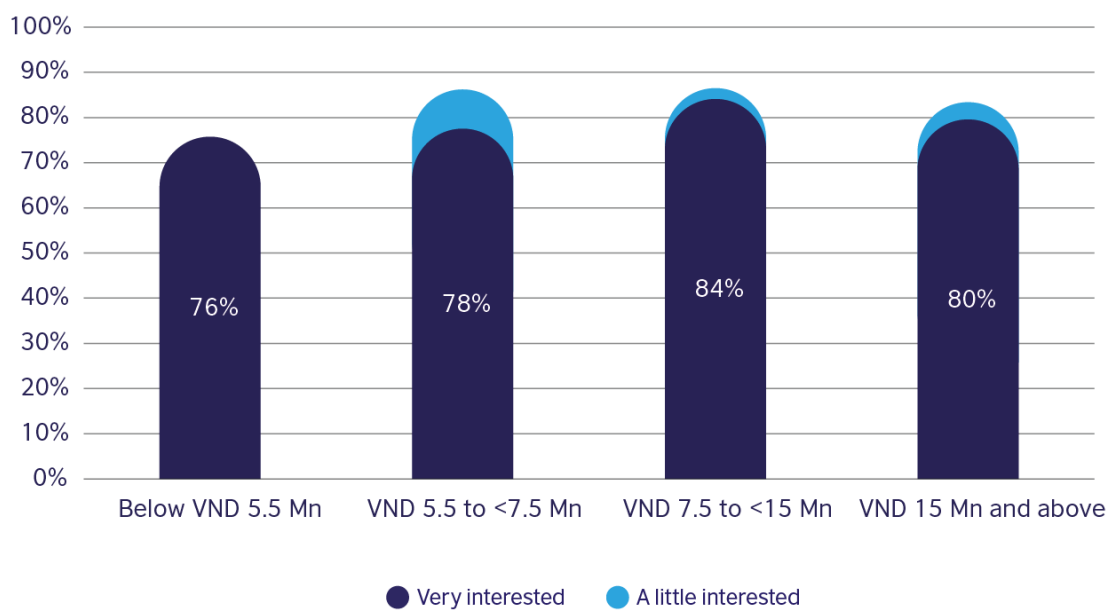
**Figure 21: Students’ interest in overseas study by monthly household income**



Base: Students (335 respondents)

Parents had a higher overall level of interest in overseas study than their children which meant that there was less room for variation between income groups. Nevertheless, there were still gaps between parents in different income bands, with the proportion of parents describing themselves as “very interested” climbing from 76 per cent among those with monthly household incomes of VND 5.5 million (£180) and below to 84 per cent in the VND 7.5 to 15 million income band, although again the level of interest in the top income band was slightly below the level in the second-wealthiest group.

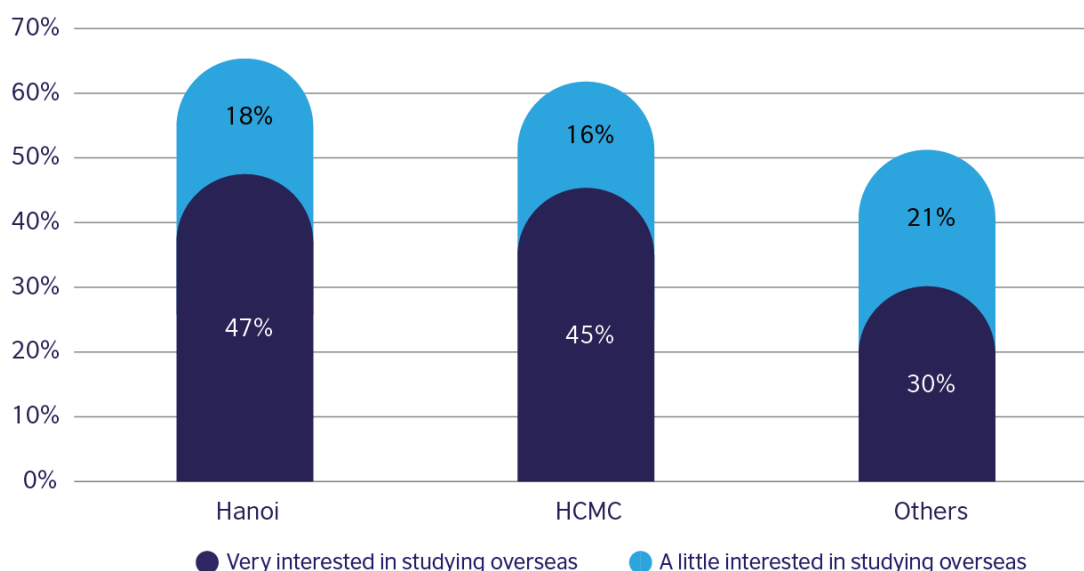
**Figure 22: Parents’ interest in overseas study for their children by monthly household income**



Base: Parents (1,054 respondents)

Looking at the geographical breakdown of interest in overseas study, students in Hanoi and Ho Chi Minh City were substantially more likely to say they wanted to study abroad than those in other parts of the country. Overall, 47 per cent of students in Hanoi and 45 per cent of those in HCMC described themselves as very interested in studying abroad, compared to only 30 per cent of those living elsewhere in Vietnam.

**Figure 23: Students' interest in overseas by region<sup>3</sup>**



Base: Students (335 respondents)

Education quality was by far the most important factor when Vietnamese students and their parents talked about choosing a study destination. Survey results showed that 79 per cent of students who expressed interest in studying abroad named this among their most important factors, as did almost the same proportion of parents who were interested in their children studying abroad. Meanwhile the most common answers in focus groups were the value of the degree in securing future job or career opportunities and the reputation of universities in that destination. The latter category was described as including broad academic excellence and international rankings, strength in specific fields of education and a suitable learning environment.

The cost of education was also an important factor for Vietnamese students. 56 per cent of survey respondents named this among their top factors, although this was seen as slightly less important by parents with only 42 per cent of this group naming it among the most important decision factors. Meanwhile among focus group participants this was a concern for both parents and prospective students, who noted that this included not only the cost of study itself but also overseas countries' living expenses, which are substantially higher than those in Vietnam. People commented that there are "many good overseas universities" which means that it is possible to choose based on which institution or country suits their budget.

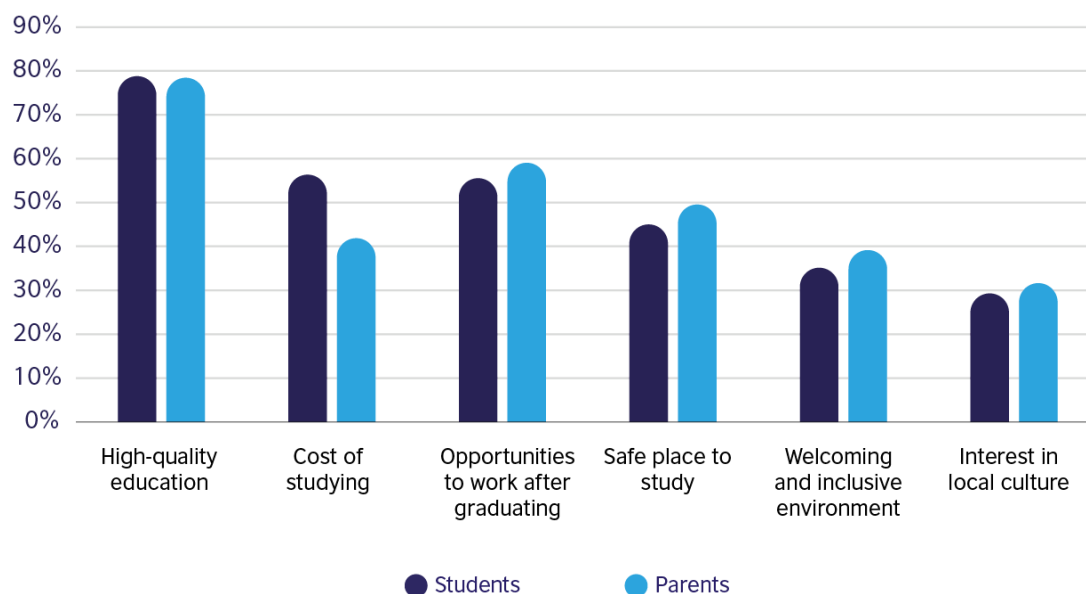
<sup>3</sup> Data for regions other than Hanoi and Ho Chi Minh City are not separated out due to comparatively low sample sizes in other cities

Opportunities to work in a country after graduation were also named as important by students and parents in both survey results and focus groups. Overseas university study was seen as an opportunity for the student to build a brighter future after graduation, and some focus group participants saw these opportunities as more common overseas. For example, one participant commented that “*you need to think about whether the country can give job future opportunities after you graduate*”. Some people also noted the presence of many companies from countries like Japan in Vietnam, and saw education in these companies’ home country – as opposed to other overseas countries like the UK whose companies are less prominent employers in Vietnam – as leading to better career opportunities after returning. More broadly an overseas degree is seen as an advantage when looking for jobs, as long as their degree certificates are recognised by local employers.

The living environment when studying abroad was also seen as somewhat important, particularly safety which was especially important to parents. A number of focus group participants also commented that having friends, relatives or a local Vietnamese community nearby was an important advantage, with this point of view again being more common among parents.

Interest in the local culture was only named as an important factor by a small minority of respondents. In surveys, only 29 per cent of students and 32 per cent of parents named this as an important factor. Focus group participants commented that culture is somewhat important when studying abroad as it will determine whether students can adjust to daily life for the time they spend overseas, but this was seen as very much secondary to concerns like the quality of the educational institution, cost of education and employability post-graduation.

Perceptions of the country’s culture were seen as being of secondary importance. These do play a role to a certain extent, students commenting that adapting to the local culture would provide a smoother educational experience, but other factors such as education quality were seen as comparatively more important. Similarly, only slightly over a quarter of survey respondents named interest in the local culture as among the most important aspects when considering a location for overseas study.

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

Base: Students interested in studying overseas (216 respondents) and parents interested in their children studying overseas (902 respondents)

Survey results showed that the UK was the 4<sup>th</sup> most common country named when Vietnamese students who said they were interested in overseas study were asked about their preferred destinations. 13 per cent of students named the UK as their first-choice destination, behind Japan, Singapore and the US but slightly ahead of Australia and South Korea. The UK also took 4<sup>th</sup> place when students were asked about countries where they would potentially be interested in studying but which were not their first-choice destination.

Focus group discussions about international education destinations showed a comparatively higher level of interest in UK study among participants who were actively involved in preparing to study abroad or who had previously studied abroad before returning to Vietnam. The UK was the most common country to be named when the topic of overseas education was raised, and was described as having top-ranked universities, a strong academic heritage. British education was described as having high standards; giving focused attention on students (especially compared to the Vietnamese system); having an emphasis on teaching students practical skills and to be creative and critical thinkers; and having high-quality syllabuses and facilities. Some participants noted the large number of well-known universities in the UK or that the UK is well-known for education, particularly in terms of business courses; the country is also seen as having open-minded lecturers.

Not every focus group participant rated the UK as number one in this field. The US and Australia were also noted for having large numbers of high-quality universities, and Australia in particular was described as having more scholarship opportunities than the UK. Others, especially parents, pointed out that Australia is closer to Vietnam and has a

large Vietnamese community which would help to support their children while studying abroad.

A number of focus group participants also talked about different countries' strengths in particular fields. Aside from the UK's strength in the business field mentioned above, a prospective student commented that "*Germany and Japan both are very developed in automobile engineering*" while an alumnus said "*I studied in France as I know they are strong in the arts*". Countries' strength in particular fields seemed to be a more prominent concern in Vietnam than in other ASEAN countries included in the present study.

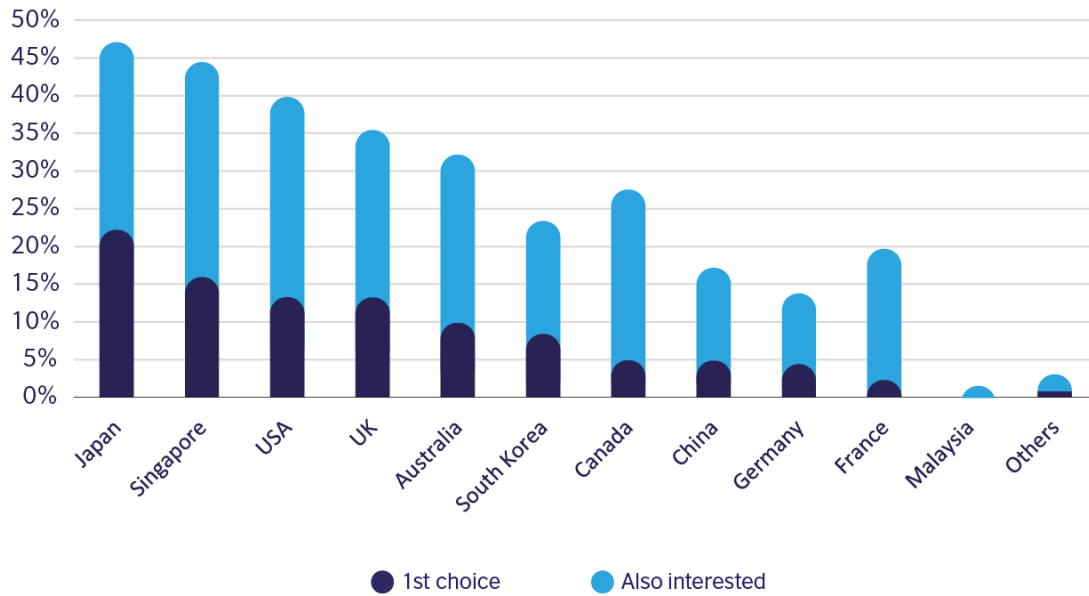
The most commonly mentioned disadvantage of UK study was its cost. One parent commented that "*I am definitely interested to send my children [to the UK] to study but the tuition fees are expensive as compared Germany*", while a prospective student said that "*it's difficult to study there since it's expensive*". Other focus group participants raised similar concerns, mentioning living expenses as well as tuition fees.

Statistics from the Japan Student Services Organization (JASSO) confirm that Japan's strong performance in the survey corresponds to a large number of Vietnamese students studying in the country's higher education institutions. Over 43,000 students from Vietnam were enrolled in Japanese HEIs in 2020, not including more than 18,000 others studying at language schools. This number was a slight drop compared to 2019 but was more than double the number of Vietnamese students at Japanese HEIs in 2015.

In contrast, the number of Vietnamese students in the UK has dropped over the last five years. Data from HESA shows that there were slightly over 3,500 Vietnamese HE students studying in the UK in the 2019/20 academic year, an 18 per cent drop compared to five years earlier.

Statistics from other countries show that the US had more than 21,000 Vietnamese HE students in 2019/20 while Australia hosted more than 13,000 in 2019. This means that the proportion of Vietnamese students eventually choosing the UK as their study destination is substantially lower than the proportion of students who chose the country as their preferred destination in the survey, suggesting a drop-off between initial interest and actual study decisions.

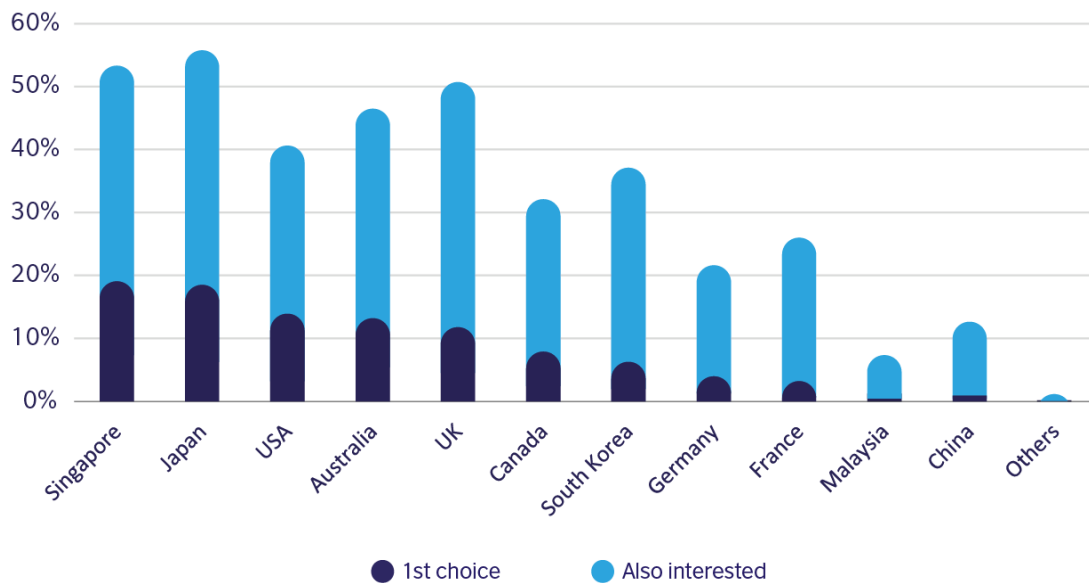
**Figure 25: Students' preferred countries for overseas study**



Base: Students interested in studying overseas (216 respondents)

Surveyed parents had a broader spread of preferred countries. The proportion naming the UK as their preferred destination for their child’s overseas study was 12 per cent, similar to that among students, but the UK was only placed 5<sup>th</sup> in this group between Australia and Canada. Compared to students who named Japan as their first-choice destination, Singapore was slightly more preferred among parents of prospective overseas students.

**Figure 26: Parents' preferred countries for overseas study**



Base: Parents interested in their children studying overseas (902 respondents)

Analysis of social media posts relating to education in three key countries – the UK, the US and China – showed that the US attracted the highest volume of posts, 60 per cent

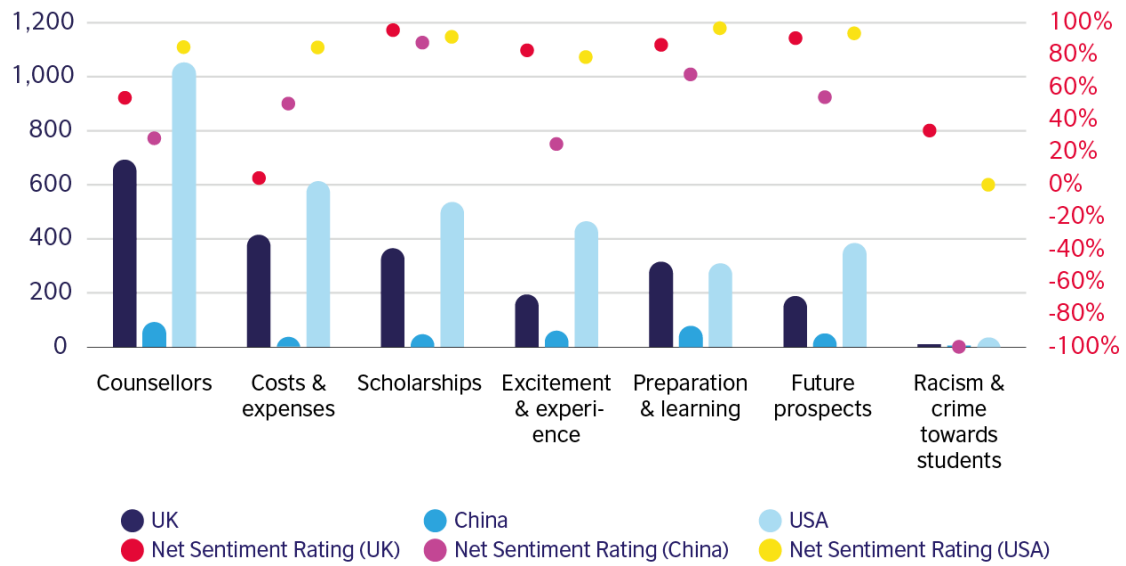
higher than the UK and more than nine times as many as for China. This shows that Vietnamese people do not readily see China as an education destination compared to other two countries – a conclusion backed up by China’s poor performance in the surveys discussed above.

A large proportion of this content comes from admissions counselling companies and experienced individuals offering study-abroad information and advice via a variety of social media channels. This content includes comparative lists of universities, help with deciding the country/university, current events affecting study abroad prospects, and advice on building a profile and preparing for life abroad. Overall a third of Vietnamese social media posts about overseas study were classed as being by or related to counsellors, substantially more than average across ASEAN countries.

The next most common discussion topics were costs and scholarships, including tuition fee comparisons, related living expenses, and even children’s school fees. Posts related to the cost of studying abroad in the UK were rated as having much lower sentiment ratings than those on similar subjects but related to the United States or China, showing that in the eyes of Vietnamese people the UK is a very expensive study destination. While discussion of scholarships was rated as having very positive sentiment in all countries there were substantially fewer posts of this type for the UK than for the US.

Posts expressing enthusiasm about overseas study and discussing experiences were also much more common for the US, perhaps reflecting the larger number of Vietnamese students that move to that country to study. In this area the net sentiment rating of posts related to China was substantially lower than those talking about the UK or USA. Meanwhile there was a more equal balance between countries of posts to preparation for studying abroad such as language certificates like IELTS, TOEFL or the HSK.

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



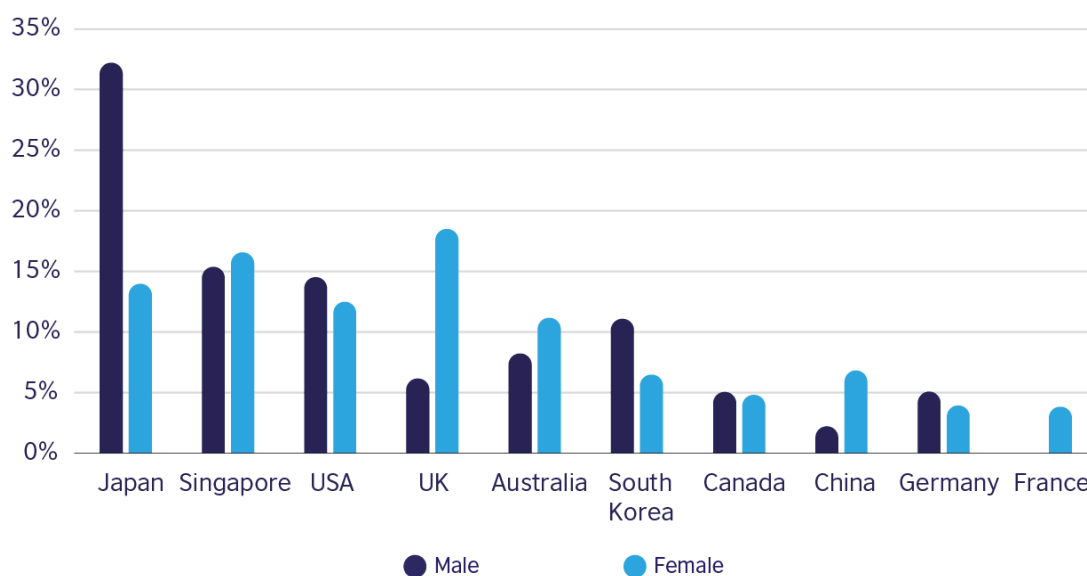
Base: Social media posts discussing education in the UK, US or China, June 2019 – March 2021

Analysis of the survey results by demographic factors shows that there are important differences in the countries preferred by male and female Vietnamese students. 19 per cent of female students who were interested in studying abroad said that the UK was their preferred study destination, more than any other country, with the second most popular country being Singapore which attracted 17 per cent of this group.

In contrast, male students are far less likely to choose UK education. Only 6 per cent of prospective Vietnamese overseas students wanted to study in the UK, with five other countries – Japan, Singapore, the US, Korea and Australia – being more popular.

Japan had a substantial advantage among male students being almost twice as popular among males as among females. Another country with an advantage among males was South Korea, which stood in contrast to most other ASEAN countries where this country was more attractive to female than to male students, while the US also had a slight advantage among male students.



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

Base: Students interested in studying overseas (216 respondents)

Survey results also suggested that the UK was somewhat more popular among older students while being at its least popular in the 15-17 age group. Yet there was no consistent trend in students' preference for the UK or other countries by household income.

Looking at regional trends, the UK, US and Canada were comparatively more popular destinations among students living in Ho Chi Minh City. In contrast Japan and Singapore were most popular among students from Hanoi, while the popularity of Australia, South Korea and China were all concentrated among students from smaller cities in Vietnam.<sup>4</sup> The UK's popularity outside of Vietnam's top two cities was particularly low compared to the overall level of interest in the country.

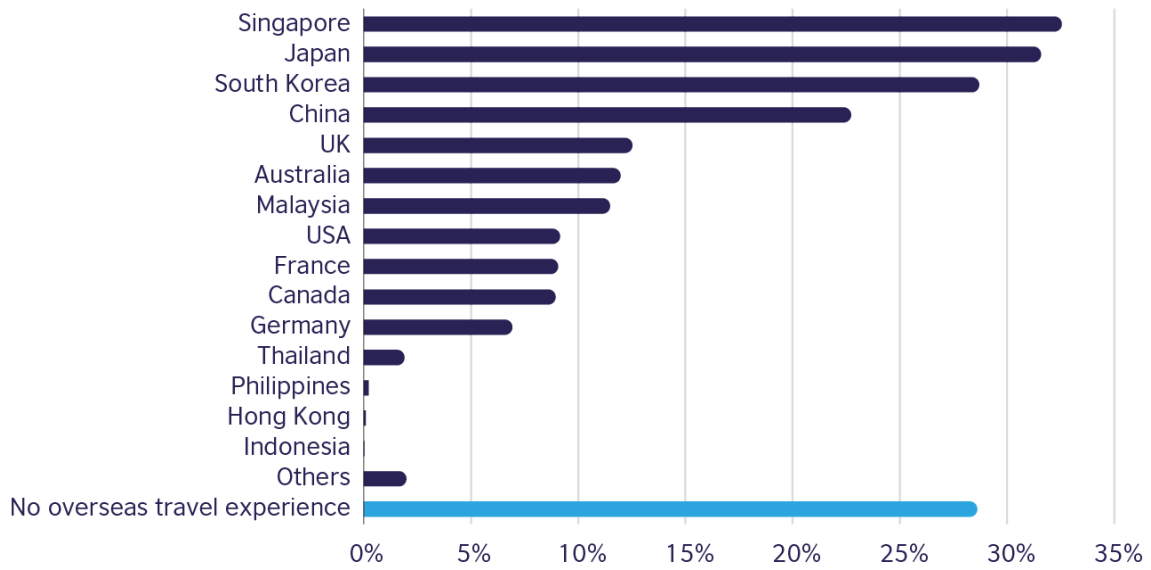
#### 4.2 Interest in overseas travel

Vietnamese focus group participants had a strong interest in travelling abroad, saying that the current Covid-19 situation has not hampered their travel interest in the long term – all are ready to travel again when the world has recovered from the pandemic. Survey results showed that over 70 per cent of surveyed Vietnamese people had travelled abroad in the past, with Singapore, Japan, South Korea and China being the most common destinations. Among those that had travelled abroad, the average number of overseas trips taken in 2019 was two.<sup>5</sup>

<sup>4</sup> However, due to the higher popularity of overseas study in Vietnam's top two cities, the total number of students from Hanoi / HCMC saying they wanted to study in these cities is still higher than the number from other parts of the country.

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

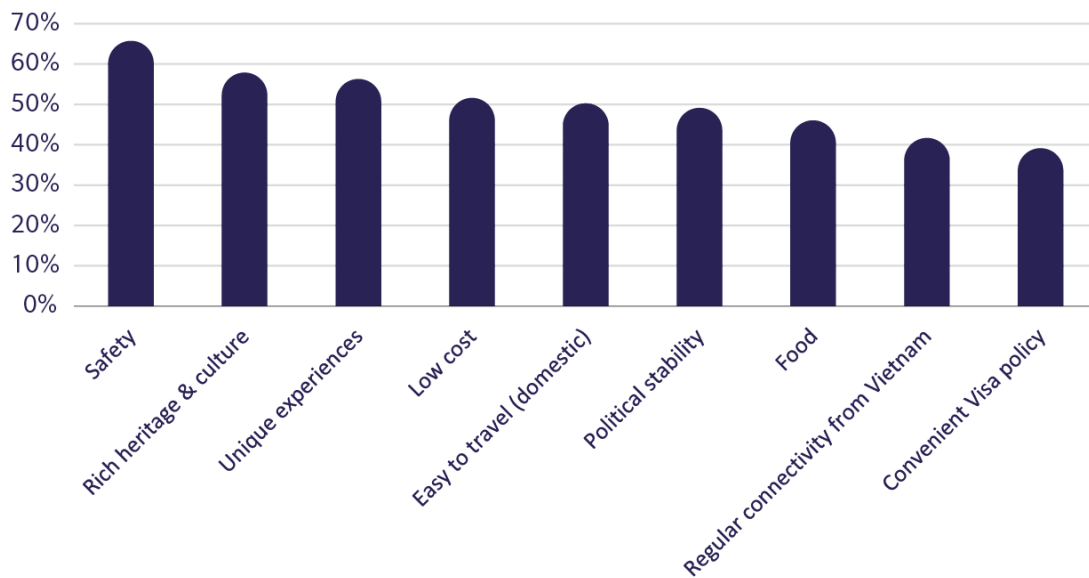
**Figure 29: Previous travel experience by destination country**



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

When survey respondents were asked about the important factors that determine the overseas countries they want to visit, the top result was safety which was chosen by around two thirds of survey respondents. The next most important factors were the destination country’s heritage and culture and the unique experiences it could offer, followed by how much it would cost to travel there.

**Figure 30: Important factors when deciding whether to travel to an overseas country**



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

The most common reason to want to travel abroad was to explore different local attractions – which depending on the country and the person involved could be anything from natural landscapes and scenery, classic historical sites, or even activities

such as sports or shopping. In the UK, one focus group participant named Manchester United's Old Trafford stadium as a place that they had a strong desire to visit, while others mentioned more traditional sites like castles and palaces.

Vietnamese people also aspire to know more about locals' way of life, attitudes and behavior, while food also emerged as an important feature of any overseas travel – for example saying that they wanted to try “real sushi” in Japan or to taste the variety of Chinese food in mainland China or Hong Kong.

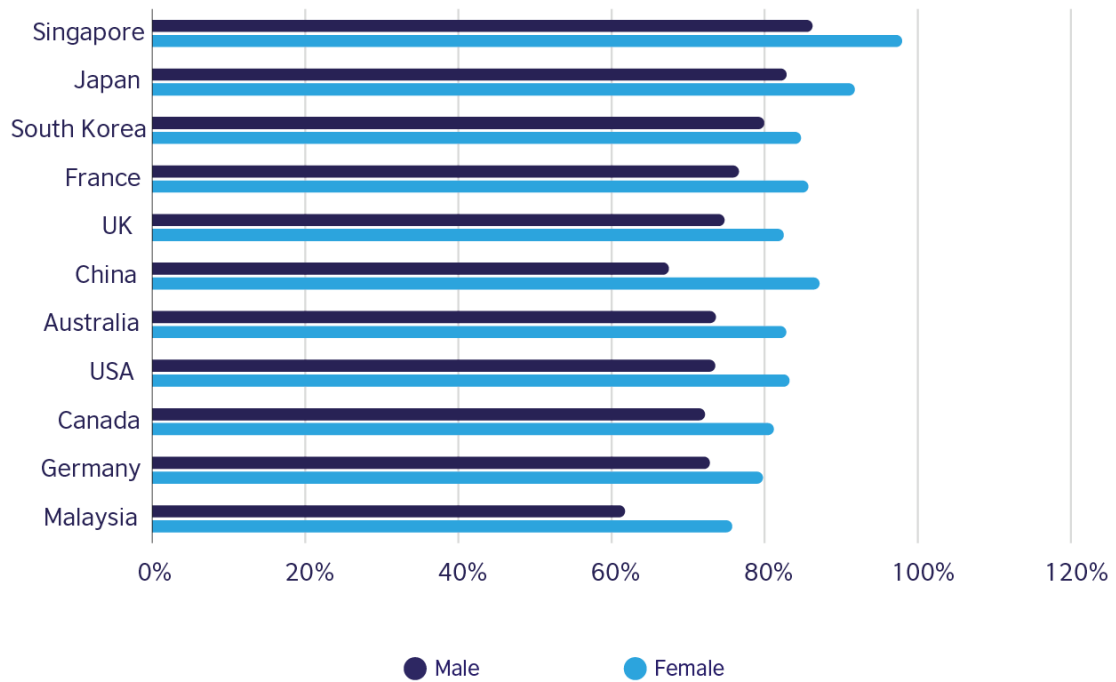
When talking specifically about Western countries, Vietnamese focus group participants linked travel to these countries with experiencing Western culture and linked this to media such as movies and TV shows that they were already familiar with. An example was a focus group participant who commented that “*Since I watch a lot of American movies, I want to see the life there to learn about it, what their lifestyle is like – it seems so interesting to explore*”. The UK was seen as more exotic than the US, Canada or Australia, with people referring to a European trip as a “once-in-a-lifetime extraordinary experience”.

As with people in other ASEAN countries, most Vietnamese respondents agreed that they wanted to travel to every country they were asked about. However, the level of interest varied, from 93 per cent overall agreement for Singapore and 87 per cent for Japan, to 68 per cent wanting to visit Malaysia, which was the lowest-rated country in the survey.

When asked about the UK 79 per cent of survey respondents said they wanted to visit, making this the 5<sup>th</sup> most popular country overall but within one percentage point of three other countries including China, Australia and the US.

The proportion of people wanting to travel abroad was higher among female survey respondents than among males for all potential destination countries, including the UK. Overall, 82 per cent of female respondents said they wanted to visit the UK compared to 75 per cent of males.

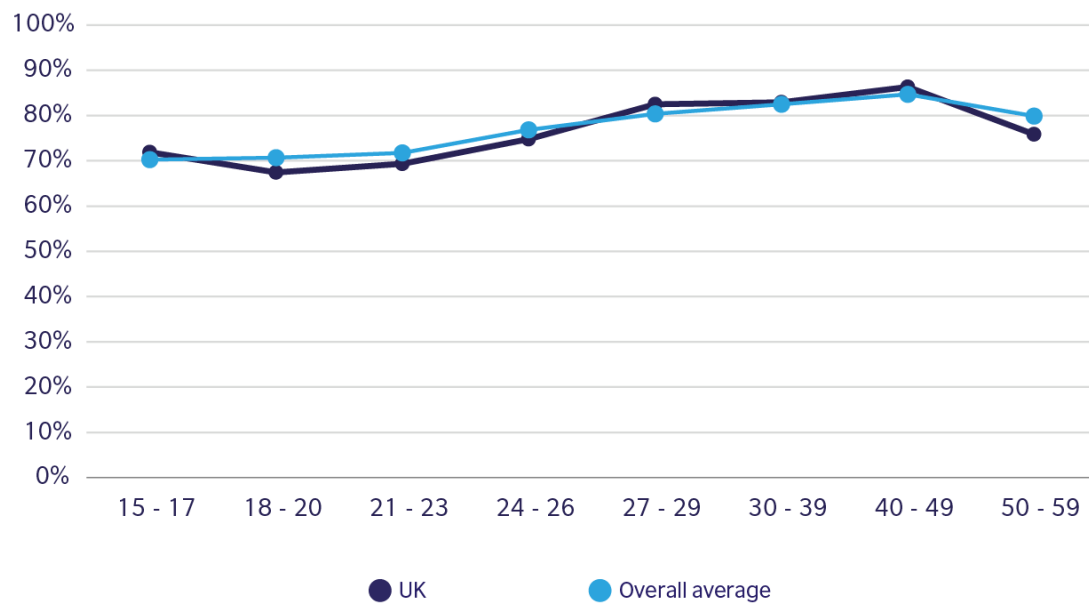
**Figure 31: Interest in travelling to selected countries, by gender**



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

The survey shows that interest in overseas travel increases slightly with age, with the overall average across all countries being 85 per cent for people in their 40s compared to 70 per cent for teenagers. Again, the trend for the UK is similar to that for travel to other countries.

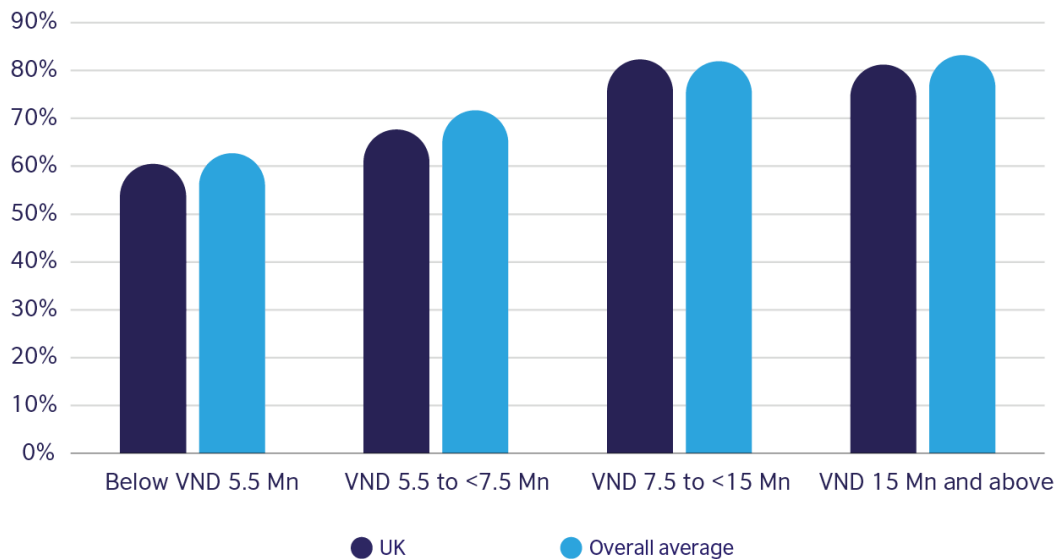
**Figure 32: Interest in travelling to the UK, by age**



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

Interest in both overall overseas travel and travel to the UK is also strongly affected by income, with a clear increasing trend as people become wealthier. 81 per cent of people in the wealthiest income group said that they were interested in travelling to the UK, 21 percentage points higher than in the least wealthy group. However, as with other income-related trends, there is comparatively little difference between interest between the top two income bands.

**Figure 33: Interest in travelling to the UK, by monthly household income**



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

By region, respondents living in Ho Chi Minh City expressed the highest amount of interest in travelling abroad, followed by those in Hanoi. Residents of other cities were less likely to want to visit other countries, although even in regions outside of Vietnam's two largest cities the level of interest was still very high at 75 per cent on average.

There is relatively little connection between the factors people see as important to their travel decisions and their likelihood of travelling to the UK. Overall the highest interest in UK travel was among people who saw a convenient visa policy as important, while those who valued a low-cost destination were the least inclined to visit the UK; however the difference between these two groups is only seven percentage points.

As with education decisions, cultural attraction also affects Vietnamese people's 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

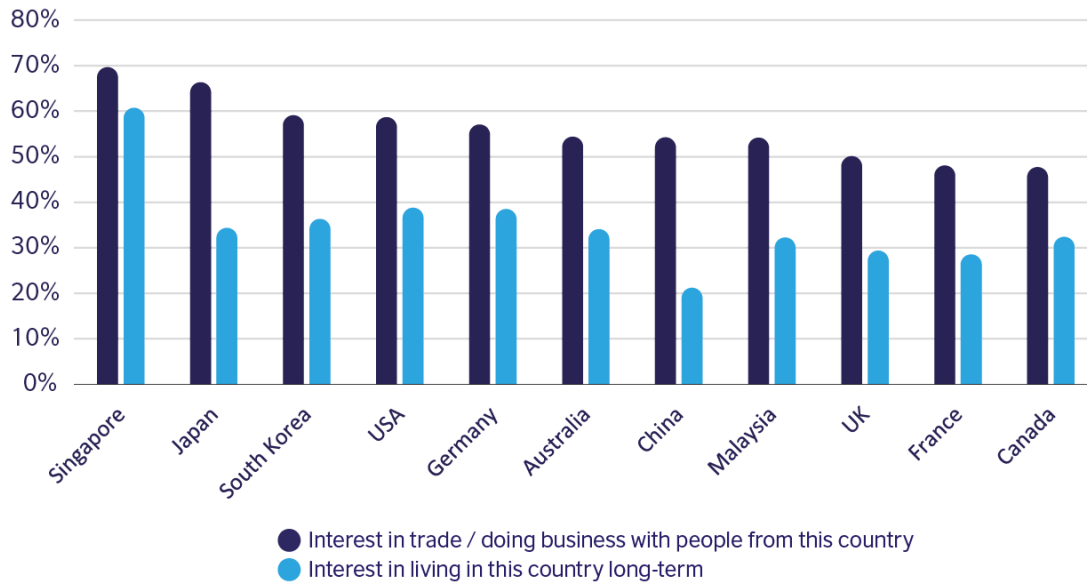
Vietnamese people had broadly positive attitudes towards overseas business. Most survey respondents gave positive answers when asked about their interest in doing business internationally with partners from any individual country, ranging from 82 per cent agreement for Singapore to 52 per cent agreement for Malaysia. The UK was in the middle of the pack, with 65 per cent of Vietnamese survey respondents saying they wanted to do business with UK partners – very similar to the proportion who said the same thing about South Korea or Canada, but somewhat lower than the number who agreed with this statement about Singapore, Japan or the US.

However, focus group responses suggest that this level of interest is relatively passive rather than representing actual plans for overseas business activities. Participants generally commented that any interest in this area is dependent on their company or employer, with many respondents saying that this is not an area with any relevance to them as they were not employed in a related field.

When focus group participants were asked about potential partner countries the only four countries mentioned were Japan, China, France and Korea. More specific questions about the UK showed that only a minority had any relevant experience or expected to be involved in this area in the future, although no focus group participants mentioned any particular barriers related to trade with the UK.

Interest in living abroad for a longer period was lower than that for business, with around half of survey respondents describing themselves as interested in moving to most countries – although Singapore was an outlier with 78 per cent of survey respondents wanting saying they wanted to live in this country for an extended period of time. Outliers in the opposite direction included Malaysia and China, while the UK was roughly average among the 11 countries listed in the survey with 47 per cent agreement. Again, focus groups show that these survey responses likely represented a fairly passive level of interest rather than an active desire to move abroad, although some young people did have a desire to work in developed countries and earn a higher income.

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



*Base: All respondents in Vietnam (1,800 respondents)*

Female survey respondents were slightly more likely than their male counterparts to say they wanted to do business with most other countries or that they wanted to live abroad for an extended period. In the UK the relevant figures were 61 per cent agreement among male respondents vs 69 per cent for females on the question of trade, and 44 vs 53 per cent when it came to interest in long-term residence abroad.

Meanwhile older age groups were generally more likely to want to do business with the UK by a substantial margin – 76 per cent of people in their 40s expressed some interest in this sort of activity compared to just 52 per cent in the 18-20 age group. When asked about moving abroad for an extended period the level of agreement was also higher among older people, which contrasted with the comments made in focus groups where working overseas appeared to be a more popular option for younger people.

When discussing the factors affecting doing business with an overseas country, the most commonly mentioned factors among Vietnamese focus group participants were economic and political stability and favourable government policy, as well as incentives or benefits offered to foreign businesses.

Another factor that focus group participants said would affect their willingness to do business with partners from a company was the behavior and attitudes of locals. Professionalism, reliability and honesty were all valued, with Japan given as an example of a country that was attractive in this way. Survey results on this topic showed that the ease of doing business stood out as the top factor when considering trade opportunities, followed by political stability and good infrastructure, while factors important for work or long-term residence included salary levels, quality of life, career opportunities, political stability, and safety or low crime rates. In both cases only a small proportion of residents saw a country's cultural heritage as an important factor, with 28

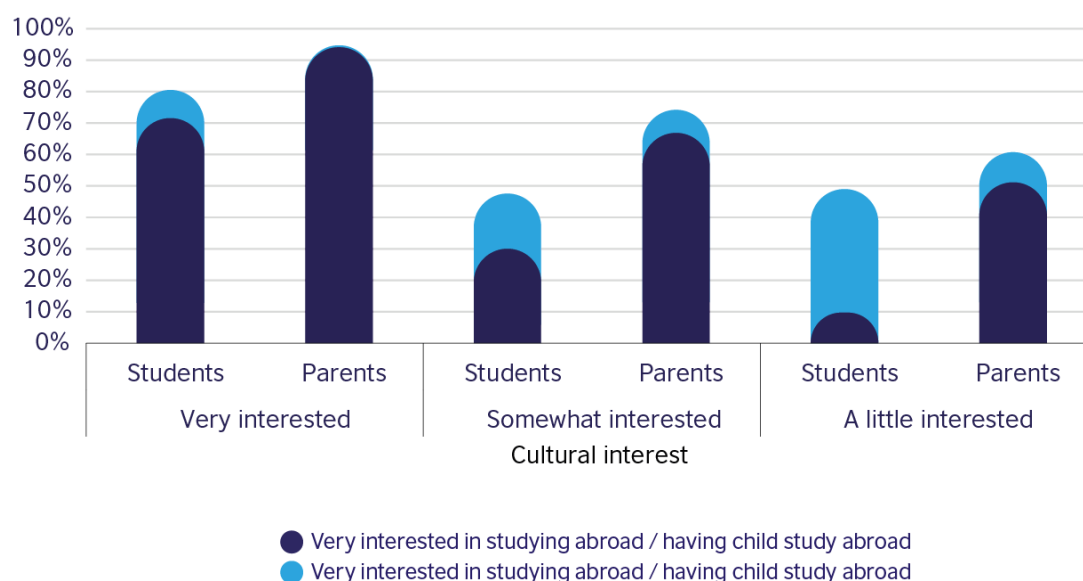
per cent agreeing with this statement for trading partners and 29 per cent agreeing in the case of long-term residence.

#### 4.4 The link between cultural interest and overseas interaction

While Vietnamese people do not see interest in other countries' culture as the main factor driving their opinions about overseas study there is nevertheless a strong connection between interest in overseas culture and students' or parents' attitude towards overseas study, in the same way as other countries in the ASEAN region.

This is clearly illustrated by survey results which show that more than 70 per cent of students describing themselves as "very interested" in overseas culture were also very interested in studying abroad. The corresponding figures were only 30 per cent for those that were only "somewhat interested" in overseas culture and 10 per cent for those describing themselves as just "a little interested". Parents expressed a higher degree of interest in overseas study overall but the trend in this group was in a similar direction, with the "very interested" group again expressing more interest in sending their children to study abroad than the "somewhat interested" group who were in turn more open to this idea than those describing themselves as only "a little interested" in overseas culture.<sup>6</sup>

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



Base: Students (335 respondents) and parents (1,054 respondents)

A comparison between students' top preferred countries in cultural terms and their preferred study destinations shows that the most attractive countries by one criterion are not necessarily the same as those who perform well in the other category. While Japan was the leading country by both metrics, the proportion of students who saw it as

<sup>6</sup> Only a very small number of students or parents described themselves as "not very interested" or "not at all interested" in overseas culture, meaning that statistics for these groups are not reliable; nevertheless the levels of interest in these groups are even lower than the "a little interested" group in line with the trend.



the top study destination was 11 percentage points lower than the proportion who named it as their favourite overseas country in cultural terms. Meanwhile China had an even larger relative gap, being more than three times as attractive for its culture as for its education opportunities. Meanwhile the opposite trend applied to Singapore and the UK – looking at the UK specifically, only 4 per cent of students who were interested in overseas study named this country as the most attractive in cultural terms, while 13 per cent said that this was their preferred study destination.<sup>7</sup>

As noted in the previous section, survey results showed that only a little over a quarter of potential overseas students saw a country's heritage and culture among the most important factors determining their interest in doing business with that country. Meanwhile in focus group discussions the consensus among both student and parent groups was that culture was seen as a secondary concern and substantially less important than the quality of the educational institution, cost of education, and post-graduation employability, among both students and their parents. To the extent that they consciously considered cultural factors when considering overseas study options this was largely linked to a potential overseas student's lifestyle and study environment – for example, a prospective overseas student commented that *"it is important that the culture is conducive to my learning environment"*, while a parent said that a suitable culture was *"crucial for study, as my daughter needs to be able to live comfortably there during her course"*.

Both survey results and focus group discussions showed that culture was seen as a more important factor in terms of overseas travel plans. 58 per cent of respondents described a country's heritage and culture as an important factor when making these plans, a higher proportion than any other factor except safety. Meanwhile focus group participants commented about the importance of experiencing cultures different from Vietnam, while interest in visiting some countries was driven by exposure to these countries' popular media or an interest in visiting famous cultural and historical landmarks.

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When it comes to living abroad, culture is important in that it determines the ability to assimilate with locals' lifestyle and way of living, and so influence whether someone would be comfortable living and working in a country for a long period. However, people interested in trade and business interactions only see culture as important in the sense

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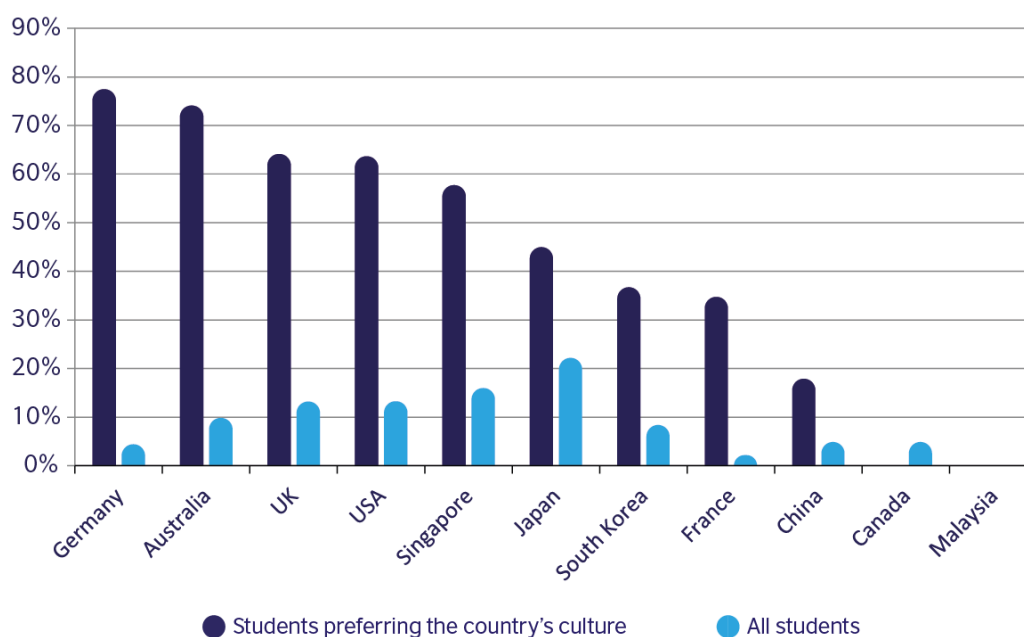
<sup>7</sup> Cultural preference for some countries is different to the figures given in Section 3.3 as the results in this section refer specifically to preference among students interested in overseas study.

of knowing how to deal with the locals there to ensure the business goes well, and commented that *“the main purpose is to get money”*.

Despite culture being consciously seen as only a secondary factor in students’ choice of study destination, survey results from Vietnamese students who described themselves as interested in studying abroad shows that cultural interest actually has a substantial effect on students’ choice of study destination. An overall total of 44 per cent of these students said that the country they named as their favourite in terms of culture was also their preferred study destination – a far higher proportion than would be expected from random chance.

Looking more closely at individual countries, students who preferred the culture of any given country were far more likely to choose this country as their preferred study destination than the general survey population. In the case of the UK, 64 per cent of students who said they preferred UK culture also said that this was their first-choice study destination, almost five times the share across the whole survey population; the ratio for the US was similar while Germany and Australia were preferred by an even larger margin by people who described themselves as interested in these countries’ culture

**Figure 37: Students’ preferred study destination, overall and for students preferring this country’s culture**



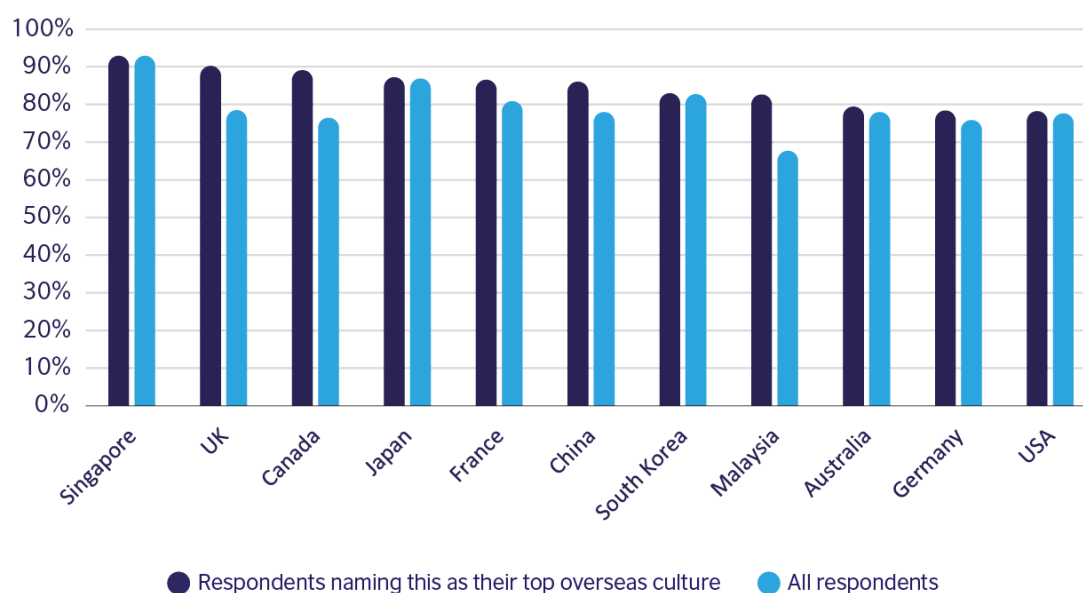
Base: Students interested in studying overseas (216 respondents)

If study destinations beyond the first choice are also included, students preferring an overseas country’s culture are even more likely to say they want to study there – in the case of the UK, 85 per cent of prospective overseas students that preferred UK culture named this among the study destinations they were interested in, far higher than the overall 45 per cent share among all prospective overseas students.

This relationship holds even among students who said that interest in a country's culture did not play an important role in their choice of study destination. Even among survey respondents that said this was not an important factor, students naming a given country as their cultural preference were far more likely to name that country as their first-choice study destination compared to the overall population, by a ratio similar to that for students who said that culture was something they consciously considered when choosing a country.

Survey results show that the same trend applies to tourism in most countries. Treating the UK as an example, while 79 per cent of all survey respondents said they wanted to visit the country, the proportion among people who described the UK as their preferred overseas culture was 90 per cent.

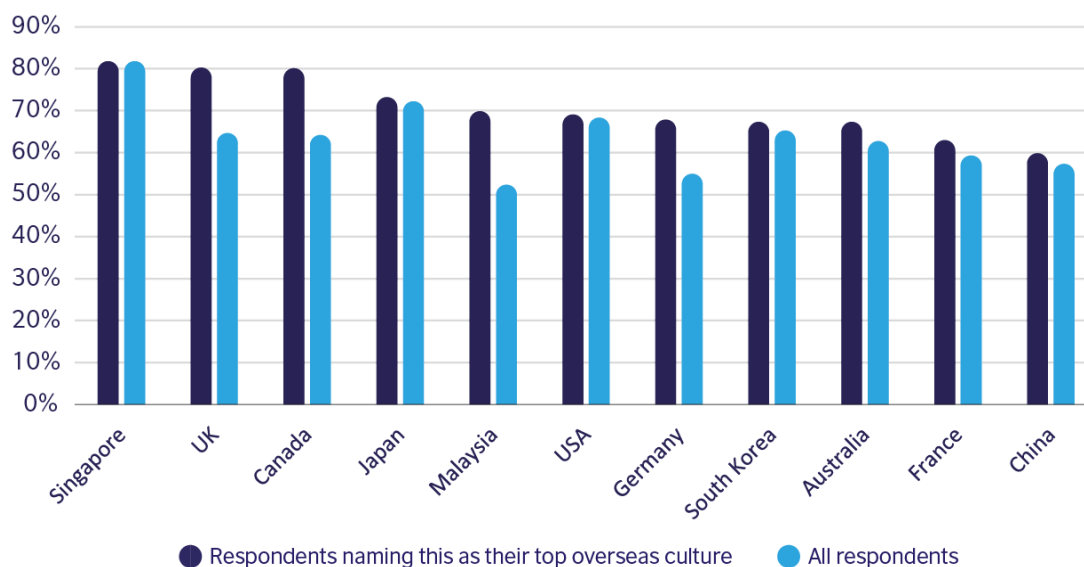
**Figure 38: Interest in travelling to selected countries, overall and for Vietnamese people preferring this country's culture**



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

The same effect applies in the business field, where surveys and focus groups expressed the general attitude that cultural interest does not play an important role. While 65 per cent of all survey respondents said they wanted to pursue trade or business opportunities with UK partners, the proportion among those who found UK culture attractive was as high as 80 per cent. Attitudes towards other countries are also affected, although the countries with the strongest overall performance in terms of perceived business opportunities such as Singapore, Japan and the US generally saw a smaller gap between people who found their culture attractive and those with less interest.

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



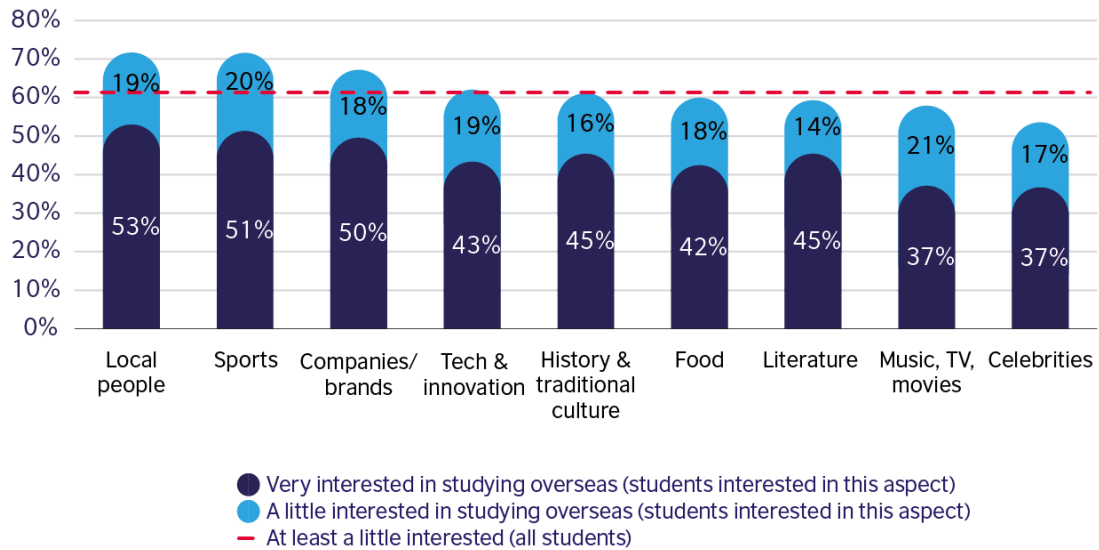
Base: All respondents in Vietnam (1,800 respondents)

The gaps in interest in living in different countries long-term depending on cultural interest were substantially larger than those for business or tourism. In the case of the UK, 62 per cent of those that named the country as their preferred overseas culture said that they would be interested in living in the country long-term, compared to only 47 per cent of all survey respondents.

As noted throughout this report, survey results likely overestimate the proportion of people who will actually go on to study, visit, work in or do business with an overseas country, and largely reflect a very broad initial level of interest rather than people who have seriously considered this activity and taken practical barriers into account. Results should therefore be taken as describing the effect of cultural interest on these broad initial preferences rather than directly impacting on actual international interactions. However, broad initial interest is the first step towards student mobility, business activity etc, showing that interest in the UK does have the potential to affect these forms of cross-cultural interaction.

Interest in different aspects of overseas culture had a moderate effect on students' level of interest in overseas education. Overall, the group who were most likely to say they wanted to study abroad were those who named interacting with local people among the aspects of overseas culture they were most interested in, while those describing themselves as interested in overseas celebrities were comparatively less likely to say they were interested in studying overseas.

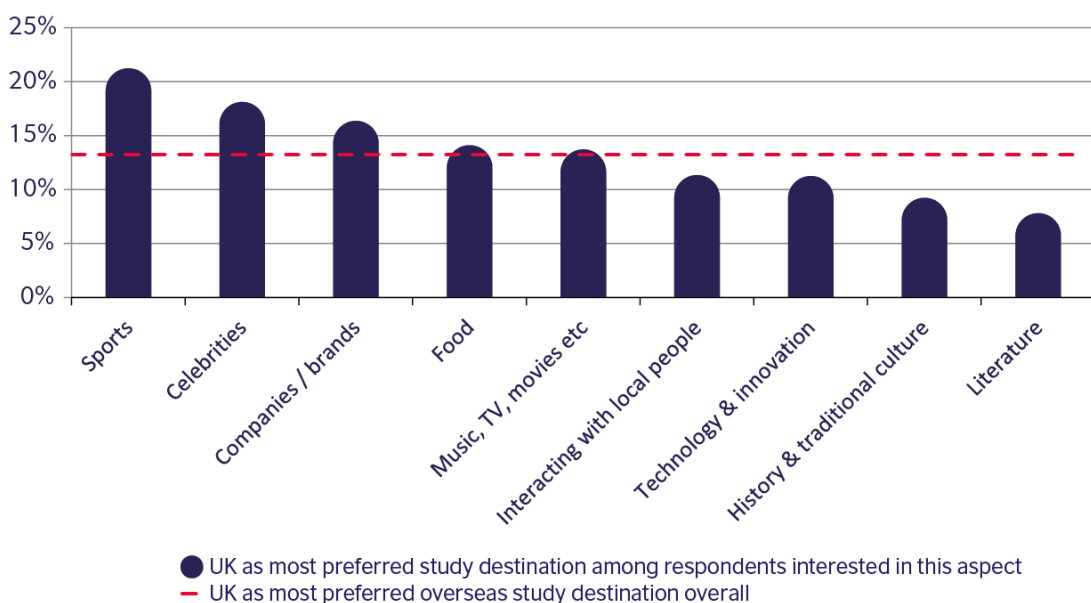
**Figure 41: Students' interest in studying overseas, by interested aspects of overseas culture**



Base: Students (335 respondents)

Among students who were interested in studying abroad, the group most likely to choose the UK as their preferred destination were those who named sports among their most-interested aspects of overseas culture. This difference is likely due to a combination of two factors described above – a strong interest in UK sports, particularly Premier League football, and the overlap between cultural attraction and study preference. However, another area where the UK is seen as culturally attractive is literature, but in Vietnam students interested in this aspect of overseas culture were instead less likely than average to say they wanted to study in the UK. This may simply be due to random effects as a result of the relatively small number of Vietnamese students who described themselves as interested in overseas literature.

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



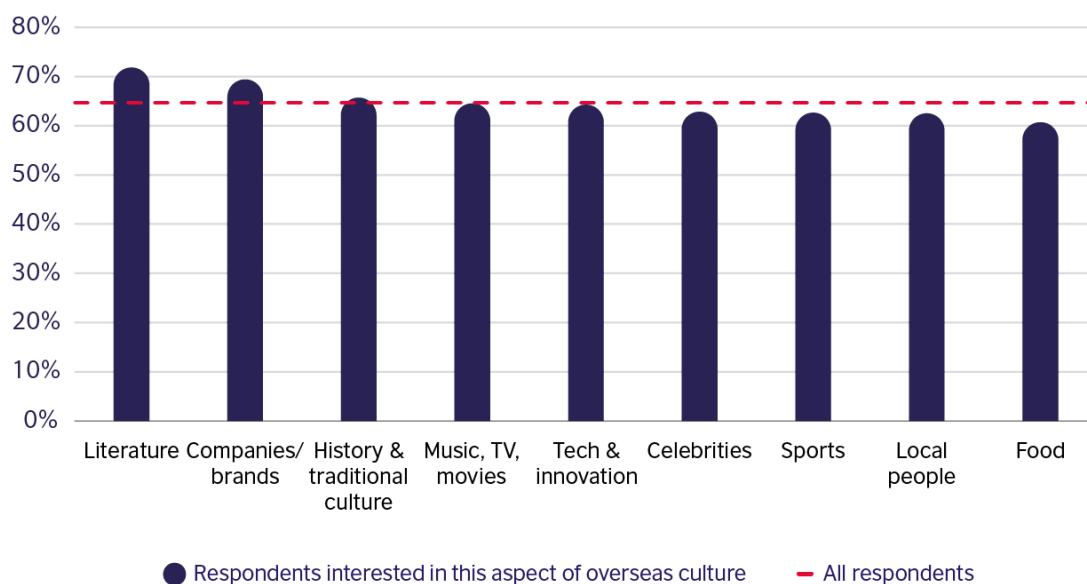
Base: Students interested in studying overseas (216 respondents)

Beyond attitudes, there is also a strong connection between physical visits and interest in studying in a country. Across most countries, students who have visited that country are substantially more likely to say that this is their first-choice study destination – for example, 41 per cent of prospective overseas students who had visited Japan said that this was their preferred study destination. This trend did not hold for the UK specifically, where prospective overseas students who had visited the country were slightly less likely to say they wanted to study there – but this difference was not statistically significant due to the relatively small number of prospective students who had visited the UK.

Interest in specific aspects of overseas culture made less difference to Vietnamese people's interest in visiting the UK than to study intentions, with the most obvious impact being that people interested in sports and celebrities were less likely to say they wanted to visit the UK. This corresponds with these groups typically being younger and less interested in overseas travel in general.

Meanwhile a preference for particular aspects of overseas culture had a moderate impact on interest in doing business with partners in the UK. People who described themselves as interested in overseas literature or companies / brands were slightly more likely to want to do business with UK partners, while those naming food as one of their main interests were the least likely.

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



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

## 5. CONCLUSIONS

While Vietnamese people have a strong interest in overseas culture, the UK is not among the top countries that they find culturally attractive. Respondents to a large-scale survey conducted in the country were far more likely to express an interest in Japanese or Korean culture, while the US, Singapore and China were also more likely to be described as culturally attractive. Similarly, social media analysis and focus group discussions also show that the UK is not among the top overseas countries that Vietnamese people are interested in. The general perception of the UK in Vietnam is as a modern developed country whose people are polite and courteous but also reserved and somewhat conservative.

One key advantage of the UK in the eyes of Vietnamese people is the strength of 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 described the UK as having top universities and a strong academic heritage as well as having an emphasis on creativity and practical skills.

The UK's strength as an education destination is somewhat less well known in the broader student population. Survey results showed that more than half of Vietnamese students said that they would be interested in studying abroad, with over 40 per cent describing themselves as "very interested". Within this group around one in eight students said that the UK would be their preferred study destination, putting the country behind Japan, Singapore and the US. Even among students preparing to study abroad several said that other countries would be more attractive than the UK, saying that other countries such as the US or Australia also had top-ranked universities, offered more attractive scholarships, or had a larger population of Vietnamese people that would give students travelling abroad a more familiar environment.

In most other areas the UK was not seen as having strong advantages over other developed countries. Most Vietnamese people are unfamiliar with UK media, in contrast to their strong interest in Korean or US content, while the country was seen as stronger than Vietnam in terms of innovation but not to the extent of being competitive with the US or China which they saw as global technology leaders.

As with their counterparts in other ASEAN countries, when Vietnamese people were asked about their choices of study destination or their attitudes towards business cooperation or living abroad, they described cultural interest as having at best a minor impact on these types of cooperation and being much less important than other factors. However, survey results showed that the impact of attitudes towards overseas countries' culture could have a stronger connection than these answers would suggest.

In the case of education, Vietnamese students who described themselves as "very interested" in overseas culture were more than twice as likely to say that they were very interested in studying abroad compared to those describing themselves as "somewhat interested" and seven times as likely as those describing themselves as "a little interested". Among students expressing an interest in studying abroad, those who named the UK as their favourite overseas country in cultural terms were also almost five

times as likely to name this country as their preferred study destination, while 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.

When interpreting the results in this report, readers should be aware that survey responses only indicate an initial level of interest and in many cases this will not translate to actual engagement with overseas countries. For example, over 40 per cent of surveyed students described themselves as “very interested” in studying abroad, while data from UNESCO shows that only around 5 per cent of Vietnamese tertiary students are actually studying overseas.

However, this report shows that cultural interest does have an important effect on whether Vietnamese people start to consider engaging with overseas countries in ways like studying, doing business or travelling. Meanwhile, an interest in UK culture is strongly linked to an initial preference for the UK as a study destination, business partner or travel destination which could set the tone for future consideration. This suggests that improvements of Vietnamese peoples’ 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.