



# Measuring the cultural dividend

How does interest in overseas culture  
affect Indonesian 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 Indonesian interest in overseas culture and the 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.
- Survey results show that, while a relatively high proportion of Indonesians described themselves as interested in overseas culture, this proportion was lower than in most other ASEAN countries. Overall, 42 per cent described themselves as “very interested”, while a total of 72 per cent described themselves as at least “somewhat interested”, ranking 5<sup>th</sup> and 6<sup>th</sup> respectively among the six target countries. The aspects of overseas culture that Indonesians are most likely to be interested in included technology and innovation, history and traditional culture, and food.
- The demographic factor with the strongest effect on Indonesians’ attitudes towards overseas culture was wealth, with people from wealthier households being much more likely to describe overseas culture as attractive. Female Indonesians were also somewhat more likely to find overseas culture attractive, while the region with the most positive attitudes was the greater Jakarta area.
- COVID-19 does not appear to have negatively affected Indonesians’ interest in overseas culture, with survey respondents reporting an overall net increase in their level of interest over the previous 12 months.
- Although interest in overseas countries as a whole is high, interest in the UK specifically is much lower. Only 5 per cent of survey respondents named the UK as their preferred overseas country in terms of culture, ranking 4<sup>th</sup> overall among 11 countries but far behind the leaders Japan and Korea.
- Indonesians see the UK as a modern developed country with a strong economy, but do not generally see it as a leader in terms of entertainment or technology in comparison to other Western countries. However, they do see the country as having strengths in its education sector. Their general perception of the UK revolves around the country’s image as a “civilised country” where people respect rules and regulations, while the UK’s history and the Royal Family are seen as its most distinctive features.
- Surveys show that a very large proportion of Indonesian young people are interested in overseas study, with over 60 per cent of students describing themselves as “very interested” and more than four fifths saying that they are at least a little interested in overseas study. Female students, people from wealthier families and students in relatively older age groups (21+) had even higher levels of interest.

- However, the proportion of Indonesian students actually going abroad to study is far lower than the fraction of survey respondents expressing interest in this option, which suggests 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 proportion of Indonesian young people saying that they were interested in studying abroad was extremely high – more than 60 per cent said they were “very interested” in overseas study, with more than four fifths of all surveyed students describing themselves as at least “a little interested”. Parents were also very positive about their children studying overseas, with 62 per cent saying that they are “very interested” and a further 10 per cent expressing at least some interest.
- While the UK was rated as more popular in terms of overseas study compared to overall cultural interest, most Indonesian students did not see the country as their preferred study destination – only around 8 per cent of all survey respondents that said they wanted to study abroad named the UK as their first-choice destination. Instead, Japan and the US were seen as the most attractive destinations, followed by Korea and Australia.
- Attitudes towards UK education were more positive among groups who were actively engaged with overseas study preparations, as the country’s education system was seen as having strong advantages due to top global universities and encouraging critical thinking and practical applications; the only other country seen as having a comparable level of quality was the US. However, students also described UK education as expensive and having a lack of scholarship options compared to other overseas countries.
- 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 three times as likely to name the UK as their first-choice destination compared to the overall group of potential overseas students.
- Most Indonesians described themselves as interested in travelling abroad, although the Covid-19 pandemic has reduced interest in overseas travel in the short term. However, while a majority said they would like to visit the UK, the proportion of people saying this was lower than for most other overseas countries. The proportion of people saying they wished to do business with UK partners or to live or work in the country for an extended period was also lower than for most other overseas countries.



- As with study preferences, interest in travel, overseas business and living and working abroad is linked to cultural attitudes. People with more interest in overseas culture were more likely to want to engage in those forms of international interaction, while a preference for UK culture is also linked to a higher likelihood of wanting to engage with the UK specifically.
- The link between interest in a country's culture and preference for that country as a study preference means that Indonesian 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 does this mean?*

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

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

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

The research in the current study draws on several sources:

- Analysis of user-generated posts on social media, especially Twitter posts as well as public posts on other networks including forums, blogs, comments on relevant news sites and other sources.
- A large-scale online survey distributed in early 2021.
- Online focus groups with Indonesian 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 93,653 posts – the majority of which were on Twitter – that mentioned the UK, US or China in the context of culture, education, work & immigration or personal wellbeing.

Quantitative surveys were distributed in the first quarter of 2021 through an online platform. Users were targeted based on a representative sample of Indonesians, taking into account factors such as gender, age and ethnic group. A total of 2,500 responses were received in Indonesia, as part of a total of 13,200 responses across all six target ASEAN countries.

Some of the analysis in this report discusses differences between Indonesians in terms of socio-economic status. Survey respondents divided into categories based on Nielsen's classification of Indonesian socio-economic status, which is based on a combination of household income, household size, fuels used for daily cooking needs and sources of drinking water. The highest socio-economic status group was labelled as "Upper 1", with other categories in descending order of SES including "Upper 2", "Middle 1" and "Middle 2"; respondents classified below Middle 2 were excluded from the survey results.

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

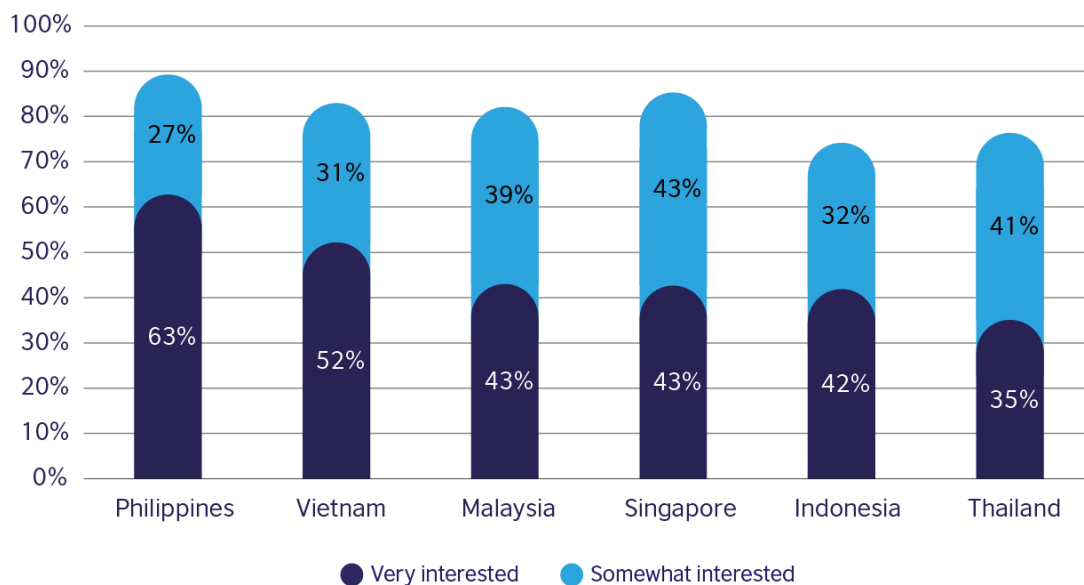
## 3. INDONESIAN PEOPLE'S INTEREST IN OVERSEAS CULTURE

### 3.1 Level of interest in overseas culture

Survey results show that 42 per cent of Indonesians described themselves as “very interested” when they were asked a broad question about their level of interest in overseas culture, while a total of 72 per cent described themselves as at least “somewhat interested”.

While this represents a strong majority of the population it is still noticeably lower than many other ASEAN countries. Indonesia ranks 5th among the six countries covered by this series of reports in terms of the proportion of respondents who were very interested in overseas culture, and 6th if measured by those who were at least somewhat interested.

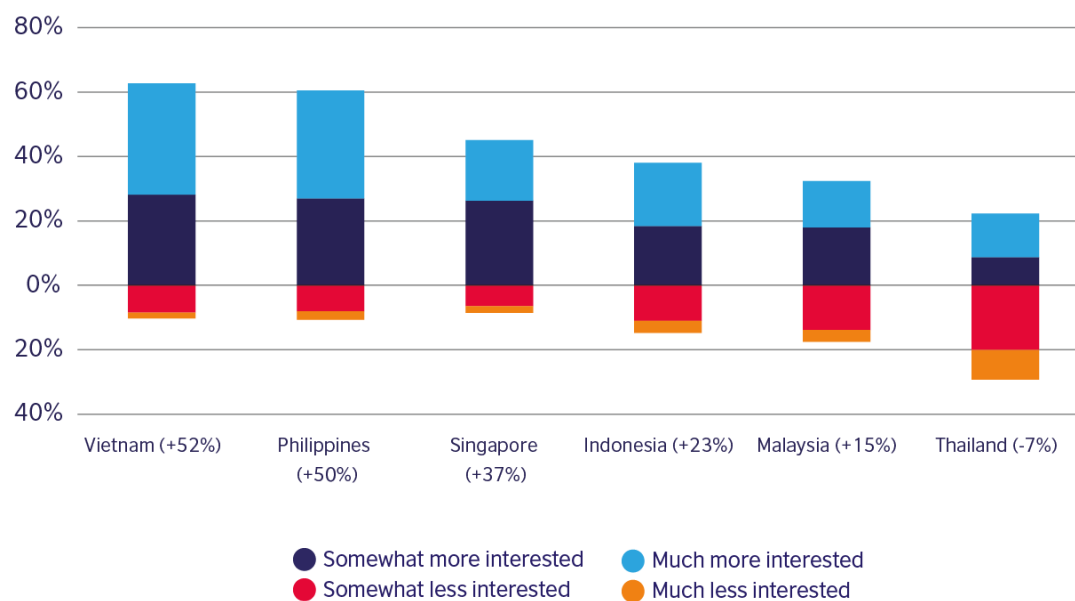
**Figure 1: Interest in overseas culture, Indonesia vs other ASEAN countries**



*Base: All respondents (2,500 respondents in Indonesia / 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. Responses in Indonesia suggest an overall net positive change, with 38 per cent of people saying they have become more interested in overseas culture over that period compared to 15 per cent who said the opposite. However, Indonesian attitudes were again less positive than the overall ASEAN average.

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



Base: All respondents (2,500 respondents in Indonesia / 13,200 respondents total)

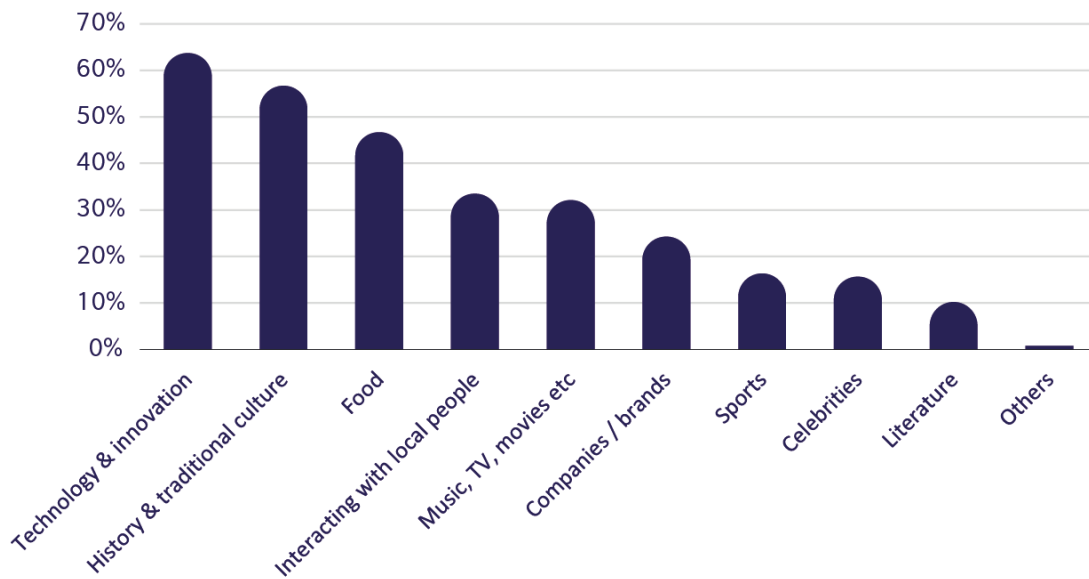
Focus group discussions with Indonesians – including groups of parents, of prospective overseas students, of returned overseas alumni and of young people – show that the strongest perceptions of culture are related to local people, including their behaviour, manners, values and habits, as well as how they interact with others and the environment. Lifestyles such as work/life balance are also seen as important elements of a country's culture, while another important aspect includes customs, traditions and historical heritage.

As with other ASEAN countries, Japan was at the top of many Indonesians' minds when the subject of culture was mentioned, while others compared Singapore, the Middle East, Germany, China and Thailand.

When asked about the aspects of overseas culture they found most interesting, the most popular topic for Indonesians was technology and innovation. Almost two thirds named this among the top three aspects of overseas culture that they were interested in, followed by history and traditional culture which was chosen by 57 per cent of respondents. Almost half expressed an interest in food as an aspect of overseas culture, with a major gap between this and other aspects of overseas culture. The least popular of the nine areas listed in the survey was literature, which only 10 per cent of Indonesians listed in their top three cultural aspects.

Some aspects, such as history & traditional culture, literature and interaction with local people, were relatively more popular among respondents that described themselves as interested in overseas culture, while others, including sports as well as celebrities and media (music, film and TV), were more likely to be named as top-3 aspects among people who said they were comparatively less interested in overseas culture.

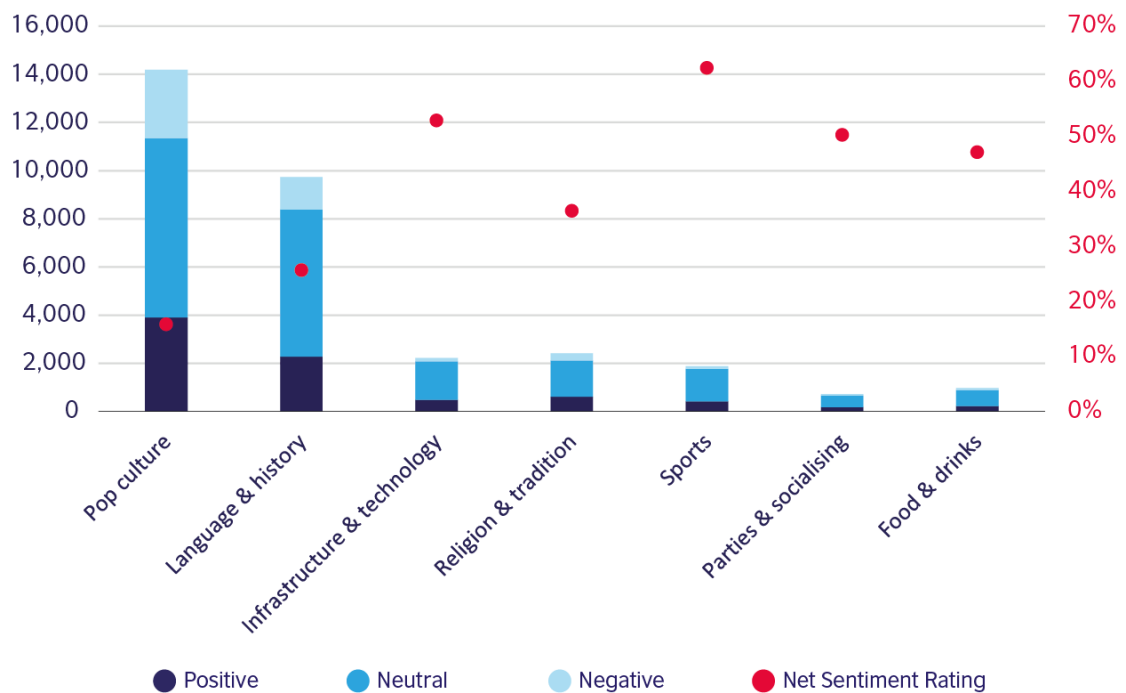
**Figure 3: Interest in different aspects of overseas culture**



Base: All respondents in Indonesia (2,500 respondents)

Social media discussion of three major overseas countries, including the UK, the US and China, shows that overseas popular culture such as movies, TV and music was the most common relevant discussion topic online, followed by discussion of overseas language and history. These two topics made up almost three quarters of Indonesians’ discussion of overseas 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’ sports was the most positive in terms of net sentiment ratio – defined as the number of

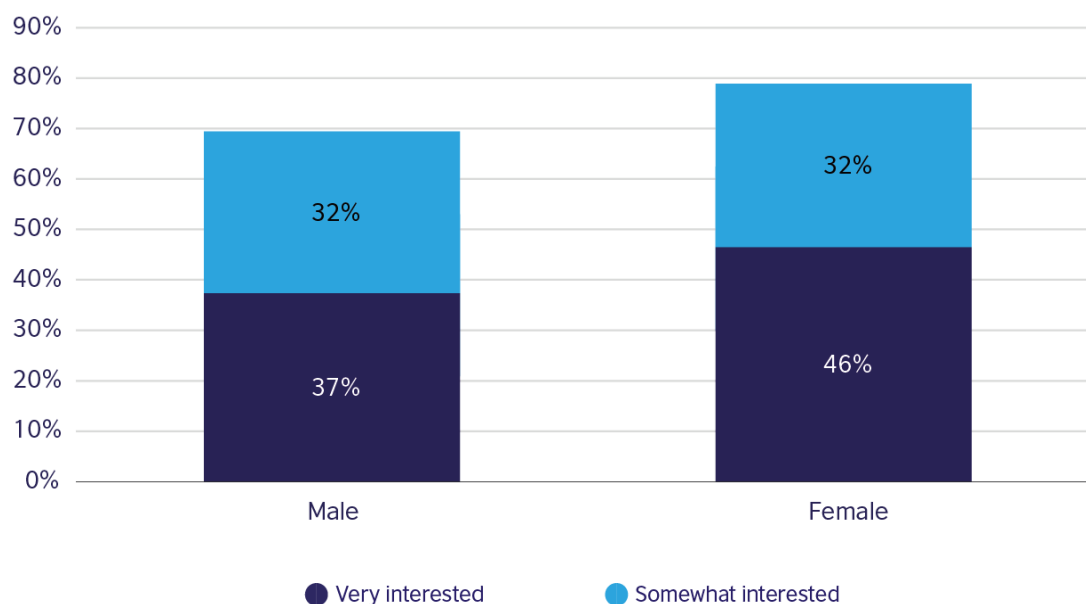
positive posts minus the number of negative posts, divided by the combined total of positive and negative posts. The NSR for sports-related posts was over 80 per cent, followed by infrastructure and technology with an NSR of 76 per cent. More detail on attitudes towards specific countries' culture can be found in Section 3.3.

### 3.2 Factors affecting interest in overseas culture

Dividing survey respondents by demographic factors, the survey results show that some of these factors have a major effect on interest in overseas culture.

Female Indonesians were much more likely to be interested in overseas culture than their male counterparts, with 46 per cent describing themselves as “very interested” compared to only 37 per cent of males. The corresponding figures for those seeing themselves as at least “somewhat interested in overseas culture” were 79 per cent and 69 per cent respectively.

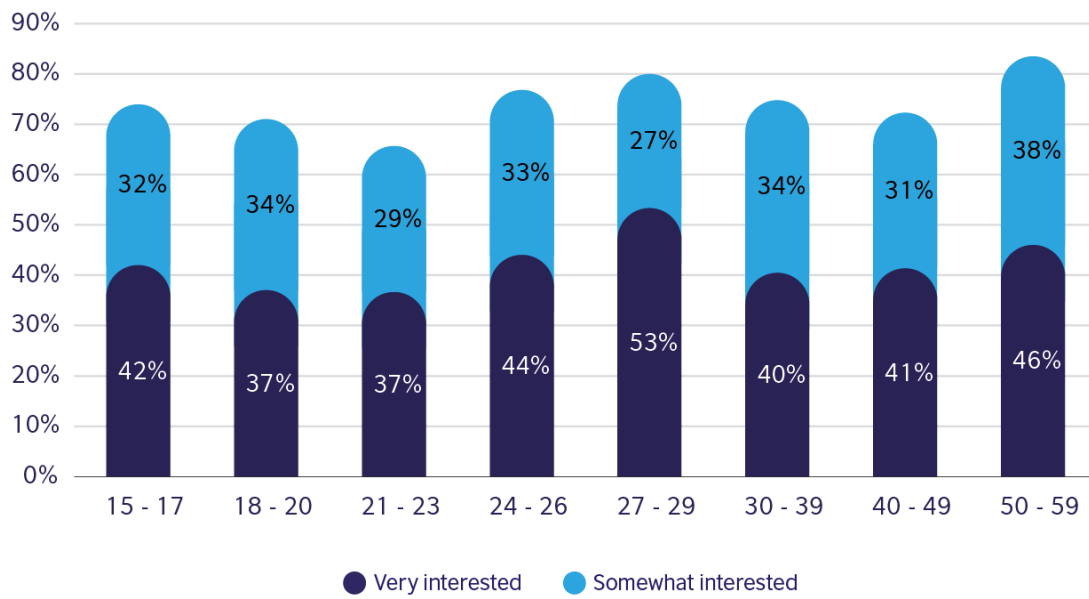
**Figure 5: Interest in overseas culture by gender**



*Base: All respondents in Indonesia (2,500 respondents)*

Variation by age is less consistent, with Indonesians in their mid to late 20s being the most likely to describe themselves as “very interested” in overseas culture but the oldest age group – those aged 50+ – also showing a high level of interest. Meanwhile Indonesians in their late teens to early 20s were the least likely to describe themselves as interested in overseas culture. However, there was little difference in attitudes between students and non-students in the same age groups.

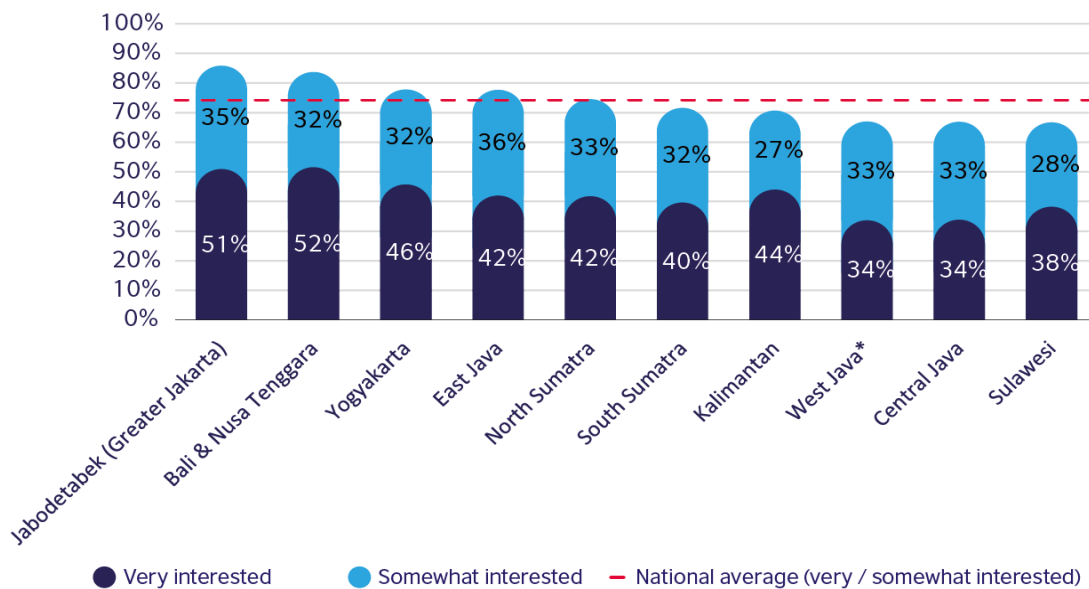
**Figure 6: Interest in overseas culture by age**



Base: All respondents in Indonesia (2,500 respondents)

A regional breakdown shows that overseas culture is most popular in the Jabodetabek region – the area surrounding the capital Jakarta, which also includes the surrounding cities of Bogor, Depok and Bekasi. Another area where survey respondents expressed strong interest in overseas culture was Bali and Nusa Tenggara in the South-East of the country, followed by Yogyakarta. Meanwhile Indonesians living in Sulawesi expressed the lowest level of interest in overseas culture.

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



Base: All respondents in Indonesia (2,500 respondents)<sup>1</sup>

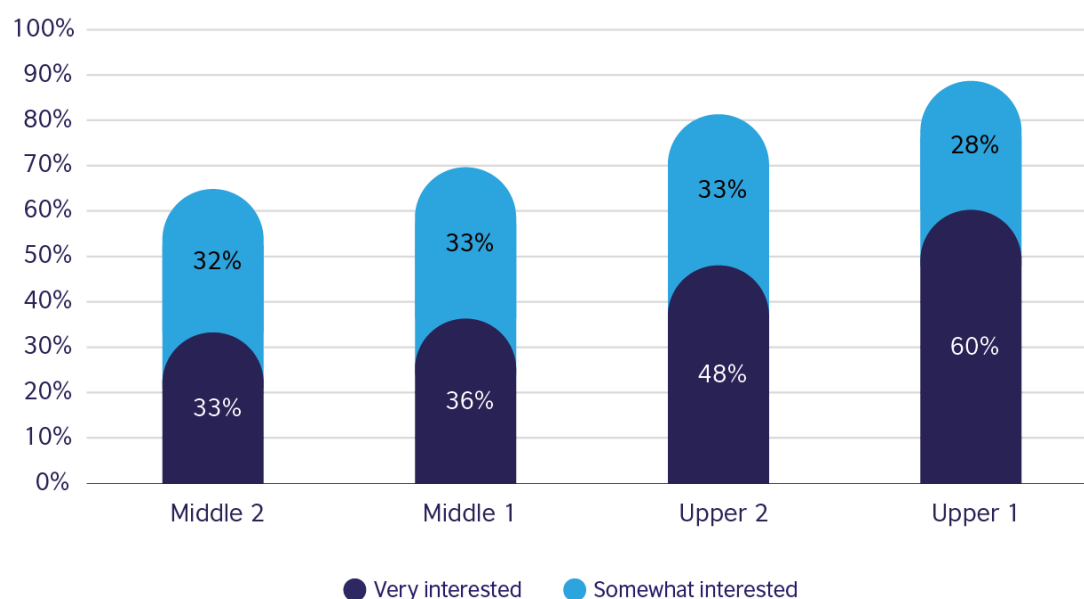
<sup>1</sup> The West Java region excludes Bogor, Depok and Bekasi, which are included in the Jabodetabek (Greater Jakarta) region



Wealth is a particularly strong indicator of interest in overseas culture. Indonesian survey respondents were assigned to four different socio-economic status bands based on total household income, household size and access to resources as described in the Methodology section of this report. From the most to the least wealthy these bands were Upper 1, Upper 2, Middle 1 and Middle 2.

There was a direct link between increasing wealth and interest in overseas culture. 89 per cent of Indonesians in the highest income band were at least somewhat interested in overseas culture, compared to only 65 per cent of those in the least wealthy category. The difference in those describing themselves as “very interested” was even more dramatic, rising from a third of respondents in the lowest of the four categories to 60 per cent of the wealthiest group.

**Figure 8: Interest in overseas culture by socio-economic status**



*Base: All respondents in Indonesia (2,500 respondents)*

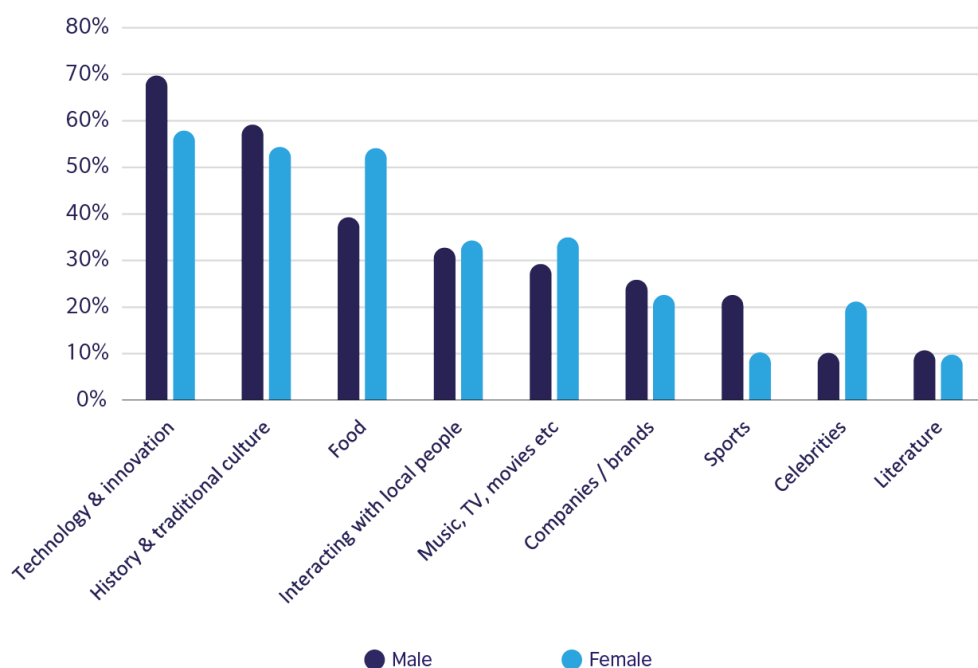
As noted in the previous section, survey participants were also asked about the extent to which their attitudes had changed over the last year.<sup>2</sup> Female Indonesians were substantially more likely to say that their level of interest had increased over the last year despite the Covid-19 pandemic, while people in higher socio-economic status groups also had much more positive answers about their change over time. However, this does not mean that male respondents and lower-SES groups had seen a decrease in their level of interest – all groups reported a net positive overall change in their interest in overseas culture over the previous 12 months. In Indonesia there did not appear to be any consistent trend in responses to this question by age.

Demographic factors also affect Indonesians’ interest in specific topics relating to overseas culture. Gender has the strongest effect here: male respondents were more than twice as likely as females to name sports among their top three aspects of overseas culture, while technology also had a large gap with male respondents more

<sup>2</sup> As noted in previous sections, the survey was conducted in early 2021

likely to express an interest in this topic by twelve percentage points. Meanwhile, female Indonesians were twice as likely as their male counterparts to express an interest in overseas celebrities as well as being substantially more likely to name food among their top three aspects of overseas culture.

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



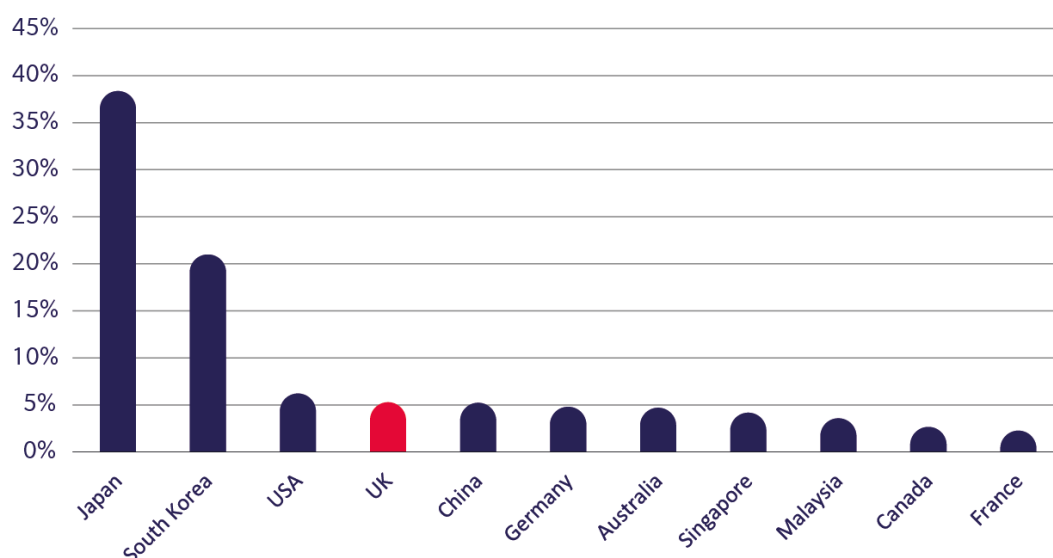
Base: All respondents in Indonesia (2,500 respondents)

Other than gender, older people were more likely to describe themselves as interested in overseas history & traditional culture, while a greater proportion of young people named popular media and celebrities among their interests. There were also differences by socio-economic status level, with wealthier people being more likely to say they were interested in literature, history and interacting with local people overseas, while lower-SES respondents were comparatively more interested in overseas celebrities, media and sports.

### 3.3 Interest in specific overseas countries' culture

Japan and Korea were by far the most popular options when Indonesians were asked to name their preferred overseas country in terms of culture. Among survey respondents who said they were interested or very interested in overseas culture, 38 per cent named Japan as the most attractive overseas countries while another 21 per cent chose South Korea.

All other countries were far behind. The US, which was the third most popular country, was only chosen by 6 per cent of respondents. The UK was named by 5 per cent of respondents, placing it 4th overall, but was only marginally ahead of China, Germany and Australia whose share of survey respondents all also rounded to 5 per cent.

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

Base: Respondents at least somewhat interested in overseas culture (1,855 respondents)

In focus groups, which also confirmed these two countries as Indonesians' favourites in terms of culture, Japan was praised for its beautiful and clean environment, good food, respectful people, well preserved customs and historical heritage, and good work ethic. The country was also named as "the most advanced Asian country", with participants discussing its well-known technology brands and consumer electronics as well as innovations like bullet trains and robotics while some were also interested in Japanese anime and manga.

Korea was described as "similar to Japan" in many ways, including lifestyle and the mindset of its people, but was also favoured for its fashion and entertainment media as well as beauty products. Indonesians commented that Korean entertainment content was ubiquitous across social media, meaning that even people who are not especially interested in this content were still aware of current trends.

The UK was not initially mentioned by focus group participants when asked about their preferred country in terms of culture, nor was it mentioned when they were asked about countries with a good lifestyle, attractive media or strengths in science and technology. Indonesians did name the UK as a leader in terms of education, both for well-known individual universities and because of a broader education system that encourages critical thinking, practical opportunities and support for students. More information on attitudes towards UK education can be found in Section 4.

When asked specifically about their attitudes towards the UK, Indonesians again mentioned the country's strong higher education system and also talked about the UK as having a strong economy and being well developed in all aspects. In the words of one participant, "everything that we deem as modern can be found there". In terms of lifestyle, the UK is seen as a typical developed country, with good infrastructure but a high cost of living. The most distinctive characteristic of the UK among many Indonesians was its history and the Royal Family.

When discussing UK entertainment media, Indonesians commented that this is not as popular as content from the United States and some found it hard to distinguish between British and American content. However, some did express positive opinions on British music and sports, particularly the Premier League.

The UK is also not regarded as being a technology leader in the same way as the US, Japan or China. One participant commented that “*the USA is mostly associated with military technology, Japan focuses on daily life technology, but when it comes to the UK, I don't see or hear any news*”. Others agreed that they did not see the UK as having particular advantages in this area.

Another prominent perception of the UK revolves around the country's image as a “civilised country” where people respect rules and regulations and have polite manners and a friendly attitude, but who are also seen as somewhat arrogant and closed-minded. Perceptions of people from the UK and other countries are discussed in more detail in Section 3.5.

Indonesians also discussed their perceptions of other countries. The strongest perceptions of the United States were as a developed country with a high standard of living, as well as a technology leader. Focus group participants were familiar with US media, mostly through online streaming platforms, and also named the US as one of the countries with a strong higher education system as it was the home of top many worldwide universities.

China's strongest advantage was seen as its strong advancement in technology and innovation – backed and encouraged by the Chinese government's policies. One Indonesian commented that “*even the beggar on the street does not accept cash but they will show you a QR code*”, seeing that as an example of how China's technological advancement; others also described China as an innovative country. China's food and historical heritage were seen as attractive, while some Indonesians also see Chinese-language movies and TV dramas as attractive, although this was not the case for all focus group participants.

Finally, Singapore was also mentioned as attractive in cultural terms due to its “clean and orderly society” and harmonious racial relations and respect of cultural differences. This country was seen as offering an attractive lifestyle due to good infrastructure and a low crime rate.

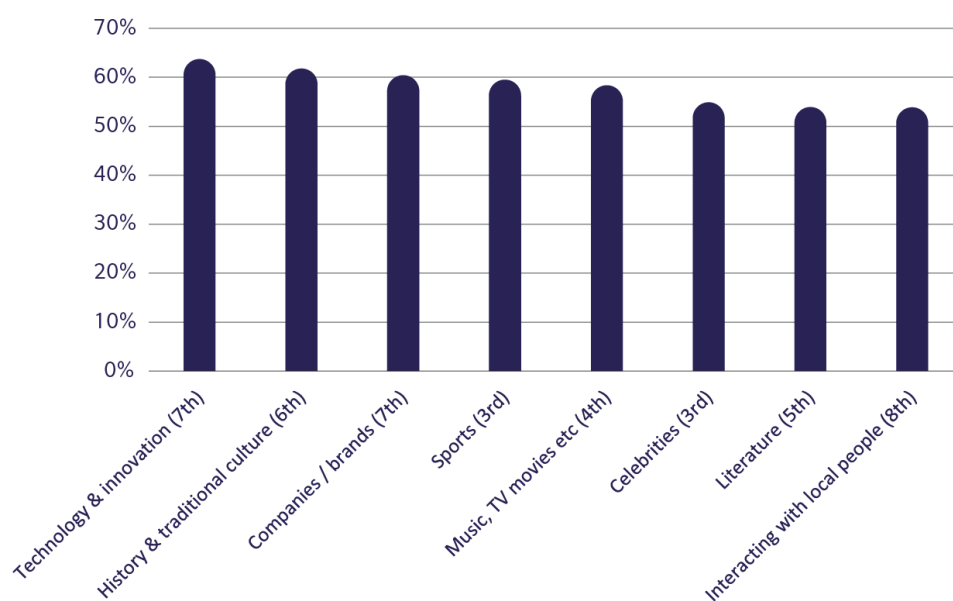
The majority of focus group participants felt that Indonesia itself was not on a par with the leading overseas countries, due to lower standards of living, a lack of government support and resources for technological development, and a lack of self discipline. They did express positive attitudes towards Indonesian entertainment content, saying that the country is making progress in this area although there is still room for improvement.

Similar attitudes were expressed in survey questions about the attractiveness of countries in terms of different aspects of overseas culture. Japan was the strongest performer across most categories, with the highest proportion of Indonesians describing it as attractive in terms of companies and brands, history and traditional culture, interaction with local people, literature, and technological innovation. Korea was

ranked second among most of these categories and was also seen as the leading overseas country in terms of celebrities and popular media. Meanwhile the US was seen as the top overseas country in terms of sports, as well as being second to Korea in terms of celebrities and media and second behind Japan in the strength of its companies.

The area where the highest proportion of Indonesians described the UK as attractive was technology and innovation followed by history and traditional culture. However other overseas countries performed even more strongly in these areas, meaning that the UK's performance was relatively weak in comparison. In relative terms the UK's strongest performance was in sports and celebrities, with the country being seen as the third strongest country in each of these two aspects.

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



Base: All respondents in Indonesia (2,500 respondents)

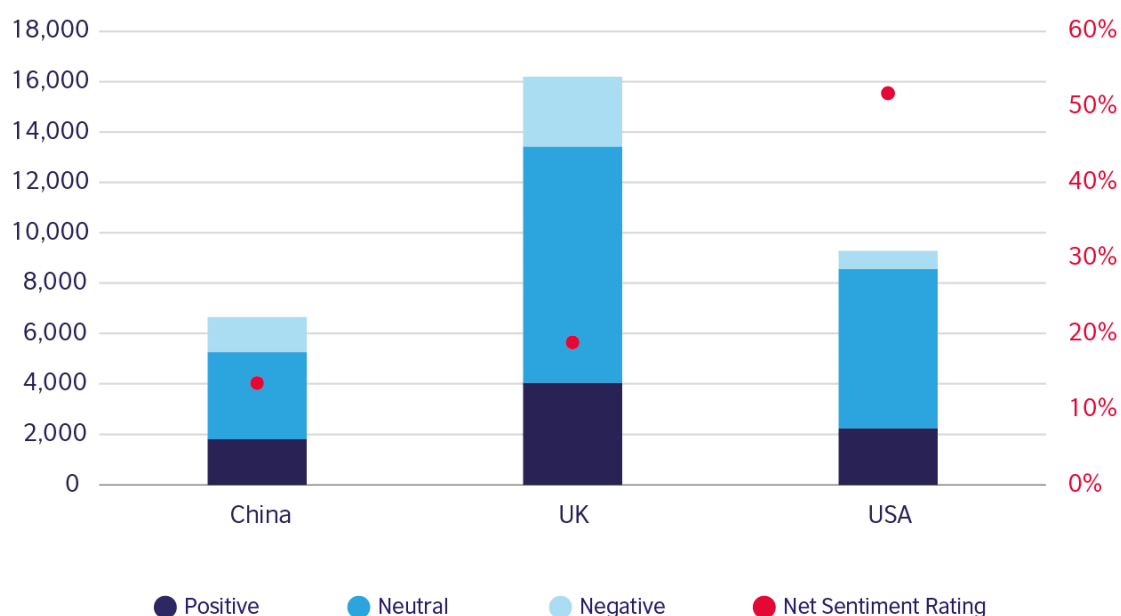
Social media analysis compared discussion of UK culture to two important competitor countries: China and the United States, with discussion separated into seven broad fields.

Aspect of culture	Description
<b>Language &amp; History</b>	English/Chinese as a necessity/skill for Indonesians; 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 Indonesian food; drinking culture

This analysis concluded that the country attracting the most social media posts in these subject areas was the UK, with more posts tagged as related to this country than for China and the US combined. However, the proportion of posts assessed as showing positive sentiment was higher for the United States, with a Net Sentiment Ratio (NSR)<sup>3</sup> of 52 per cent compared to 19 per cent for the UK and 13 per cent for China.

**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

Popular culture including movies, music etc was the most popular topic of discussion for all countries. Indonesians see Movies and Music not only as a source of entertainment but also as a source of learning the culture, language and lifestyle of these countries. Sharing experiences of watching movies and learning about the culture & lifestyle of a country, writing reviews, recommending movies, sharing the positive impact of movies etc. generate positive sentiments for all countries, whereas bad movie reviews and difficulties in picking up the accent while watching movies led to negative sentiments.

The category accounting for the second largest proportion of posts related to each of the three countries was language and history. In this area, as with most others, the average sentiment of social media posts relating to the UK was more positive than that related to China but less positive than the US. Netizens elicit great interest in the history

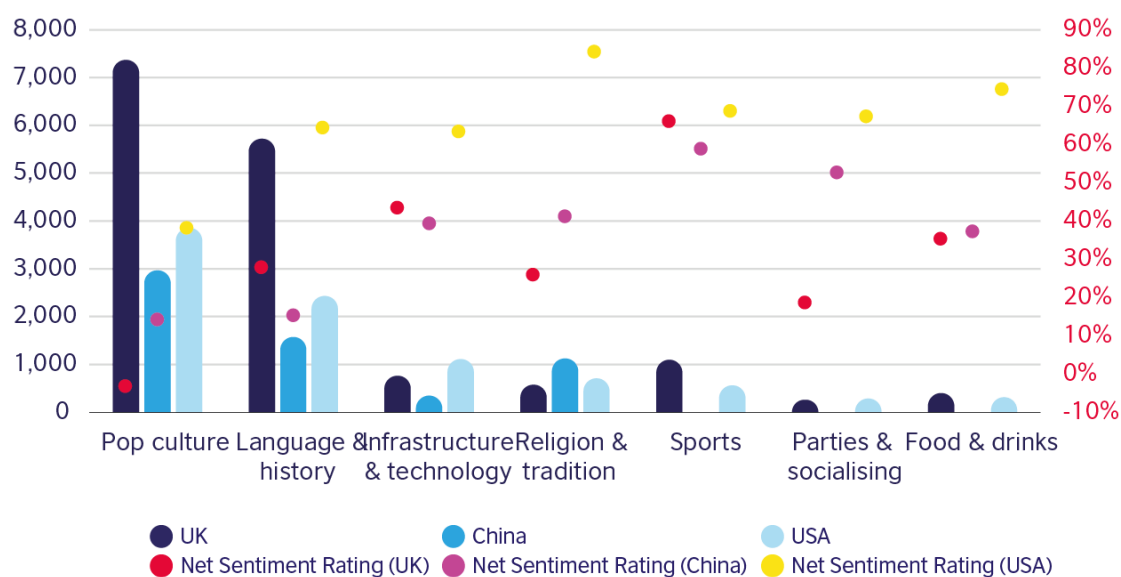
<sup>3</sup> NSR is defined as (the number of positive posts minus the number of negative posts) divided by (the number of positive plus negative posts)

and literature of Britain and China and want to learn more through various mediums. Discussions about history and the influence of Javanese & Betawi culture comes up as a prominent conversation with respect to China. They also they wish they could understand and use more English in their daily lives. However, difficulty understanding British accents and the perceived difficulty of the English language in general create negative sentiment in this area for the UK. In contrast, not a lot of prominent interest was seen in learning Mandarin or other Chinese languages.

In the case of the UK the third most popular subject area is sports. The UK dominates conversations in this field, with an interest in the English Premier League generating positive sentiments, while an incident in badminton in 2021 – in which the team was asked to back out of a tournament in the UK for reasons seen as unfair – generated negative sentiment.

Mentions of China in the Religion & Tradition category mainly included Chinese New Year celebrations and its impacts on the lives of people, along with China's relations with the Islamic world. Meanwhile the strength of the US and China in the field of technology and infrastructure highlight how Indonesia aspires to be as developed as these countries in the future.

**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, the only area where Indonesians proactively mentioned the UK as a leading country was in terms of its education system. The country is famed for its top world-ranking universities, with Oxford and Cambridge being specifically mentioned by focus group participants, but is also well regarded in terms of its higher education system more broadly – British education is seen as encouraging critical thinking, providing practical opportunities and providing good student support, while focus group



participants noted that British qualifications are recognised worldwide. Attitudes towards overseas education are discussed in more detail in Section 4.1.

Outside of education the UK's greatest strength in the eyes of Indonesian focus group participants was its status as a highly developed country, with a strong economy, good infrastructure and stable politics.

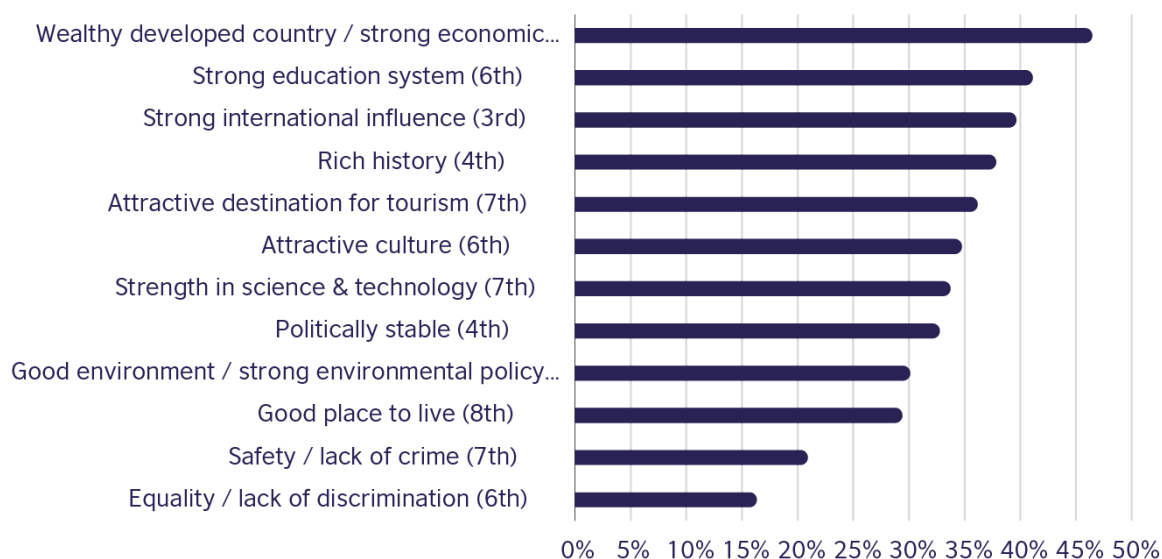
These perceptions were confirmed by survey results. Among a series of statements about countries' advantages, the two factors where Indonesians expressed the strongest agreement for the UK were that this was a "wealthy developed country with strong economic power" and that the country had a "strong education system". However, the UK's overall results for this question were behind many other overseas competitors, and fewer than half of survey respondents agreed with any given strength; among 11 countries the UK ranked only 6th on the education question and 7th on its economy. In contrast Japan performed the most strongly on these two questions as well as overall.

A related strength discussed in focus groups was the UK's perception as a "civilized country". Local people are seen as polite, friendly, respectful and disciplined, which contrasted with a perception of a lack of self-discipline among fellow Indonesians. Perceptions of people from overseas countries are discussed in more detail in Section 3.5.

Indonesians also felt that the UK had strong international influence. This was the factor where the UK had the highest overall performance relative to other countries, ranking third behind only the US and China. The UK was described as "*not dependent on any other country*" and was even described as a superpower by one focus group participant.

British history was seen as an advantage by 38 per cent of survey respondents, with the UK ranking 4<sup>th</sup> on this indicator, while focus group participants also commented on aspects like historic architecture in the UK. However, the UK performed relatively poorly when survey respondents were asked whether countries were attractive tourism destinations, with only 36 per cent agreeing, putting the country into 7<sup>th</sup> place among the 11 countries asked about in the survey.

Other advantages mentioned by focus group respondents included British sports – specifically football and the premier league, with teams such as Manchester United and Liverpool being well known in Indonesia – and the country's music industry.

**Figure 14: Perceptions of UK strengths**

Base: All respondents in Indonesia (2,500 respondents)

The country with the strongest performance on these questions was Japan, which outperformed the UK in every category except international influence and was named as the country with the strongest advantages in five fields: history, economic power, education, science & technology and overall cultural attractiveness. Singapore was the most likely to be named in four other areas – political stability, safety, environment and equality – while Korea, the US and Australia were the leaders in the categories of tourism attractiveness, international influence and attractiveness as a place to live respectively.

When instead asked about UK weaknesses, the strongest sentiment was that the UK was seen as a conservative country, with some Indonesians describing the country as a “closed-off culture” and British people as arrogant or narrow-minded. The UK was also regarded as less advanced than other leading developed countries like Japan, China and the US in terms of technological development, while a high cost of living was also described as a negative aspect of the country. Focus group participants also mentioned that studying in the UK was expensive and scholarship opportunities were limited compared to other countries, especially Germany where it is possible for Indonesian students to study for free.

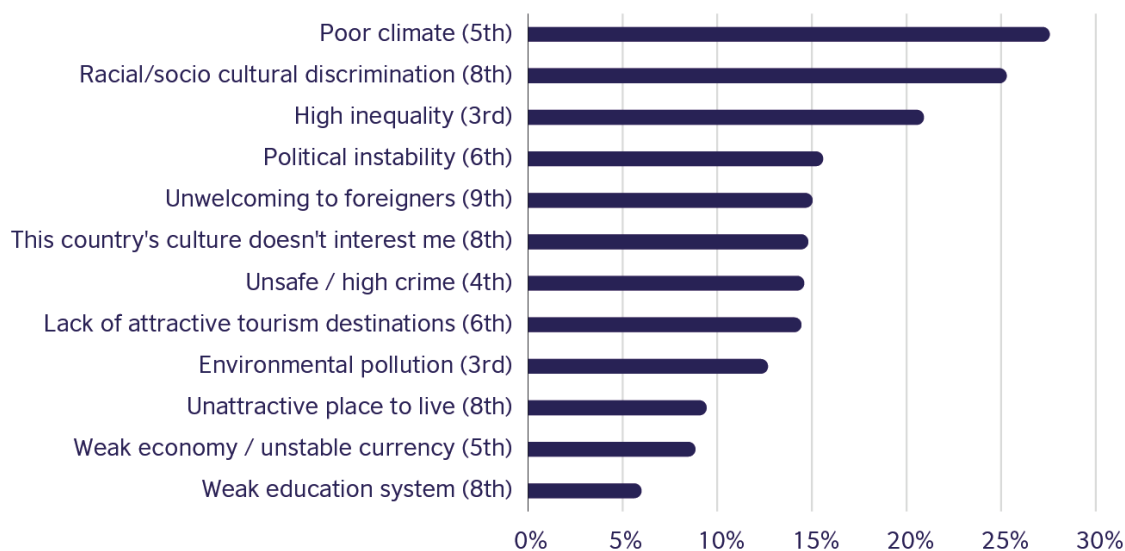
However, Indonesians generally did not see the UK as having any major weaknesses. Among 12 different areas, the field where the country was seen as having the biggest disadvantage was climate – but even here, only 28 per cent of respondents described this as a substantial weakness of the UK.

Survey results showed that the second strongest negative perception of the UK was that the country had a problem with discrimination. A quarter of Indonesians agreed with this statement, and one focus group participant – who had previously studied in the UK – commented that “*the first impression for the most of us about the UK is that they are racist*”. This former student confirmed that they had had some negative experiences with discrimination in the UK but commented that it did not apply to all British people and that the perception could be improved with better communication. Nevertheless,

the UK did not appear to have a particularly negative image in this area compared with other countries, as seven of the 10 other countries performed even worse than the UK on this question – especially the US, where more than half of Indonesians saw racial or socio-cultural discrimination as a problem.

Other negative perceptions were held by even lower proportions of Indonesians. Inequality was seen as an issue by 21 per cent of survey respondents, while even lower proportions agreed with other negative descriptions of the UK.

**Figure 15: Perceptions of UK weaknesses**



Base: All respondents in Indonesia (2,500 respondents)

### 3.5 Perceptions of people from different countries

As noted above, the most common perception of British people in Indonesian focus groups was that they are civilised and polite. British people were described as “*very disciplined and orderly*”, with examples such as obeying traffic rules, queuing up in order, and obeying lockdown restrictions during the Covid-19 pandemic.

Survey results showed that the strongest perceptions of British people among Indonesians is that they are disciplined, proud of their country and culture, and hard working. However, while the proportion describing British people as disciplined or hard working was relatively high – 45 per cent and 41 per cent of survey respondents respectively – this was substantially lower than the proportions who said the same about Japanese people, statements which almost three quarters of survey respondents agreed with. British people were also less likely to be described in this way than Germans or Singaporeans.

Several focus group respondents contrasted this with their perceptions of their fellow Indonesians, who they described as egoistic and lacking punctuality and self-discipline, commenting about people disobeying traffic rules or ignoring stay-at-home rules during the pandemic.

However, there is also a negative side to this perception of British people, with some focus group participants having an image of them as cold, arrogant and closed-minded. Nevertheless, survey results show that impressions are in general positive – 30 per cent of Indonesians described British people as friendly compared to only 8 per cent that said they were uninterested and distant.

Another common topic when Indonesians were asked about their perceptions of British people was the British accent. Some commented that they had less familiarity with British English than with US English, and so felt that people from the UK would be more difficult to understand.

As noted in the previous section, some Indonesians also see British people as racist, although others commented that the UK is more accepting of diversity than many other countries. In general most Indonesians have little experience with British people and their perceptions are based on broad stereotypes rather than actual knowledge.

Compared to people from the UK, Indonesians have much stronger impressions of Japanese people, who they describe as being polite, respecting their seniors and having an “excellent work ethic”. Singaporeans were also described as “very disciplined”.

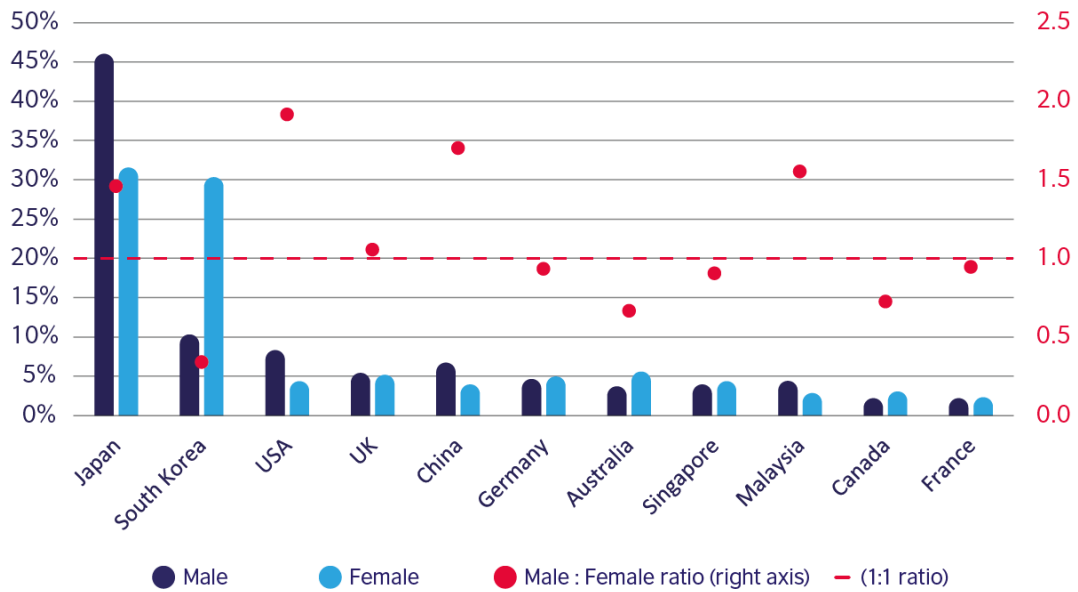
### **3.6 Factors affecting interest in different countries**

Preference for different overseas countries varies based on gender, with some countries relatively more popular among male Indonesians while others are more attractive to males.

The country with the biggest gender gap is South Korea, which was named as the favourite overseas culture by 30 per cent of female survey respondents but only 10 per cent of males – a 3:1 difference. In contrast the US was the country that had the largest relative imbalance in the other direction, with twice as many male Indonesians as females naming this as their favourite overseas culture; China and the US were both also substantially more popular among male respondents.

By contrast, there was not a major gender difference in interest in UK culture. Among Indonesians who said they were at least somewhat interested in overseas culture the proportion of both male and female respondents choosing the UK was the same, at 5 per cent.

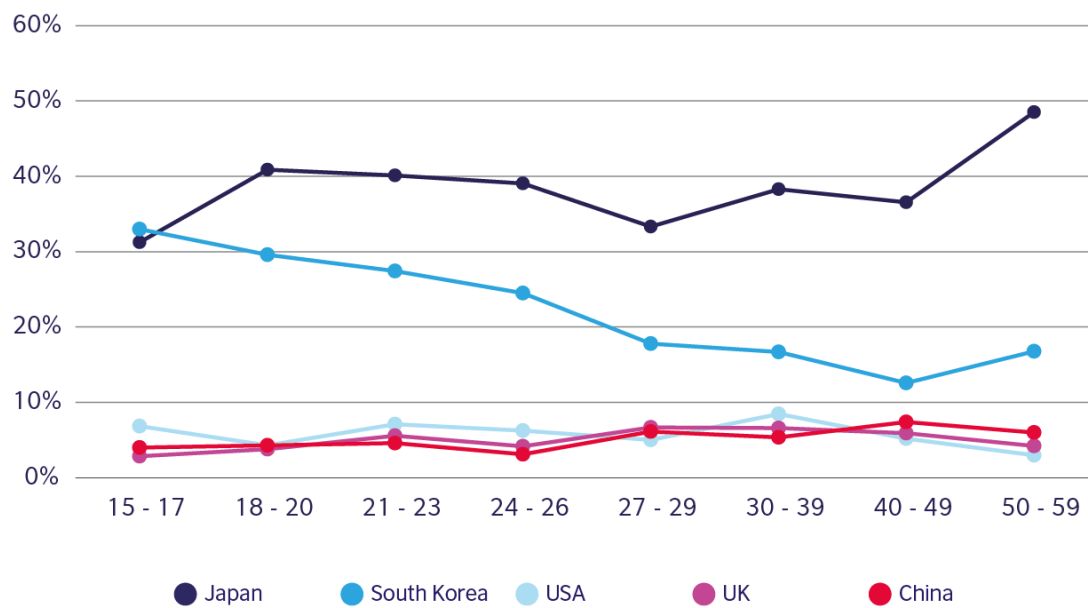
**Figure 16: Preferred overseas country in terms of culture, by gender**



Base: Respondents at least somewhat interested in overseas culture (1,855 respondents)

Breaking down the data by age shows a slightly higher preference for UK culture among older age groups, but the size of this effect is fairly limited. However, preference for Korean culture does show a very strong trend by age, with the country being far more popular among teenagers and people in their early 20s than among those in their late 20s and beyond. Japan shows the opposite trend, with relatively higher preference among older age groups.

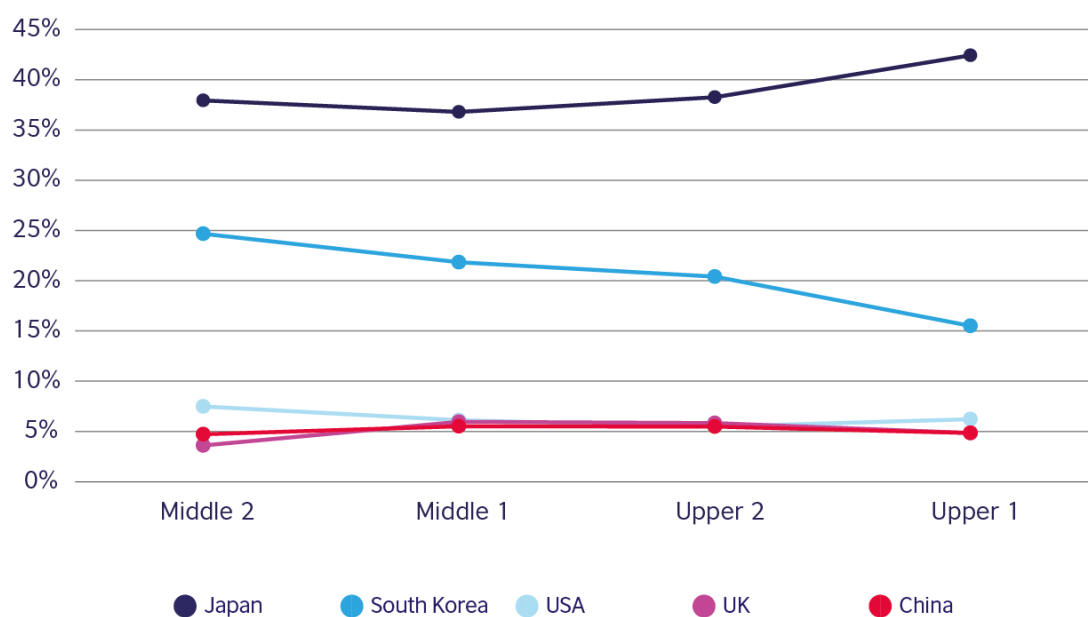
While individual Anglophone and European countries have relatively low popularity and it is difficult to see trends in preference for these countries, treating these as a group shows that interest in these countries is highest among Indonesians between their late 20s and their 40s. However, Japan remains more popular than all Western countries put together across any age group, while Korea is also more popular than this entire group up until the 24-26 age band.

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

Base: Respondents at least somewhat interested in overseas culture (1,855 respondents)

A comparison of responses by socio-economic status also shows diverging trends for Japan and Korea, with Korean culture substantially more popular among people from households with lower socio-economic status while Japan is relatively more popular among richer Indonesians.

In the case of the UK there is a slight positive trend between Indonesians' income and their likelihood of choosing this country as their favourite in terms of culture but looking at Anglophone countries more broadly there is not a consistent connection between socio-economic status and level of interest.

**Figure 18: Preferred overseas country in terms of culture, by socio-economic status**

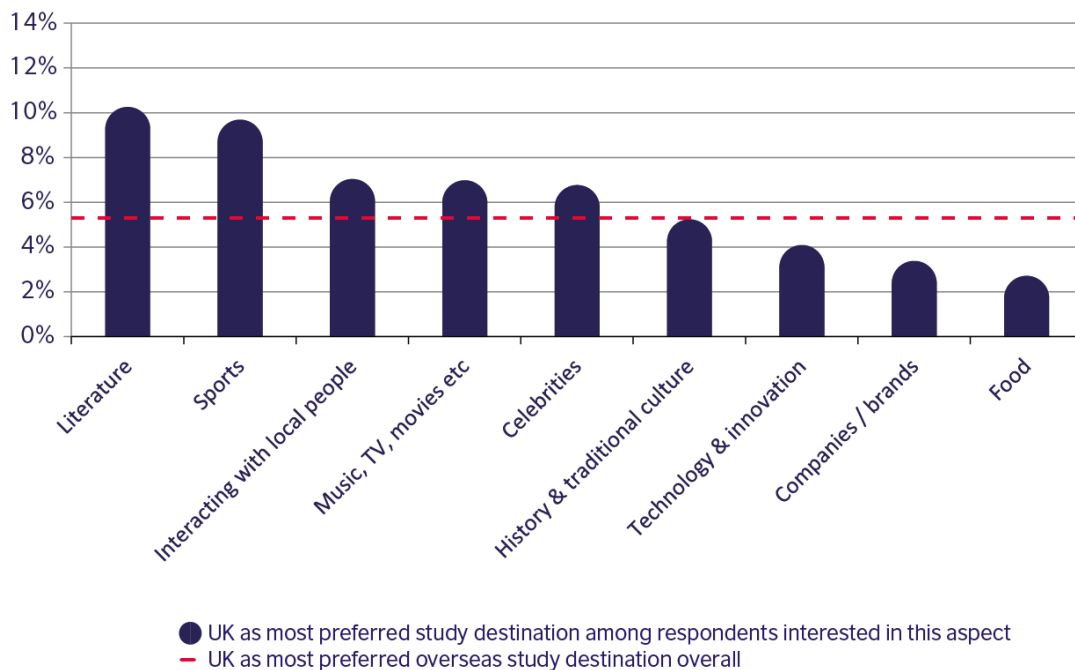
Base: Respondents at least somewhat interested in overseas culture (1,855 respondents)

Beyond demographics, a person’s preferred aspects of overseas culture also have a direct influence on which countries’ culture they find attractive. People who named literature or sports among their top three cultural interests were substantially more likely to express a preference for the UK, with 10 per cent of these groups naming the UK as their favourite overseas country in cultural terms compared to only 5 per cent overall – although it should be noted that these interests were only held by a relatively small fraction of the Indonesian population.

In contrast, people who named food among the aspects of overseas culture that they were most interested in were the least likely to name the UK as their favourite country, followed by those who expressed an interest in overseas companies and brands and technology – corresponding with less positive impressions of UK competitiveness in these areas.

Preference for other countries was also affected by the aspects of overseas culture that respondents found interesting. Korea was by far the preferred overseas country among people who said they were interested in overseas celebrities, with 42 per cent of this group naming Korea as their top overseas culture, more than twice the overall proportion of all Indonesians who chose this as their preferred country. Korea also slightly outperformed Japan to be the favourite overseas country for Indonesians interested in overseas media such as music, films and TV shows. In contrast Japan was the preferred country for Indonesians interested in all other aspects of overseas culture and performed particularly strongly among those interested in technology and in history and traditional culture.

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



Base: Respondents at least somewhat interested in overseas culture (1,855 respondents)

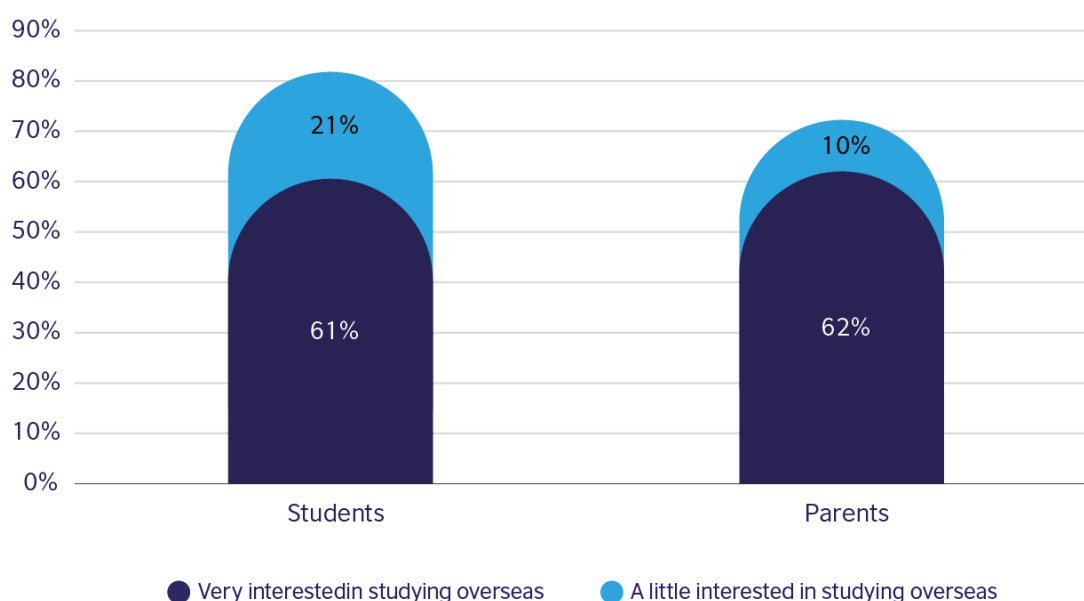


## 4. THE EFFECT OF CULTURAL INTEREST ON INTERACTION WITH OVERSEAS COUNTRIES

### 4.1 Interest in overseas education

The proportion of Indonesian young people saying that they were interested in studying abroad was extremely high – more than 60 per cent said they were “very interested” in overseas study, with more than four fifths of all surveyed students describing themselves as at least “a little interested”. Parents were also very positive about their children studying overseas, with 62 per cent saying that they are “very interested” and a further 10 per cent expressing at least some interest.

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



*Base: Students (532 respondents) and parents (1,145 respondents)*

However, this level of interest – which is even higher than in other ASEAN countries - does not necessarily translate to a large proportion of Indonesians actually going abroad to study. Data from UNESCO shows that slightly fewer than 50,000 Indonesian students were pursuing tertiary education programmes abroad in 2018 compared to more than 34 million tertiary education students studying domestically, meaning that just a fraction of one per cent of Indonesian students actually enrol on a higher education programme abroad.

The large gap between these two proportions shows that, although a large number of Indonesian students may have an initial interest in overseas study, most will eventually change their minds. This is often for financial reasons such as difficulty affording high international tuition fees, although other factors such as the need to spend a long period away from home likely also play an important role.

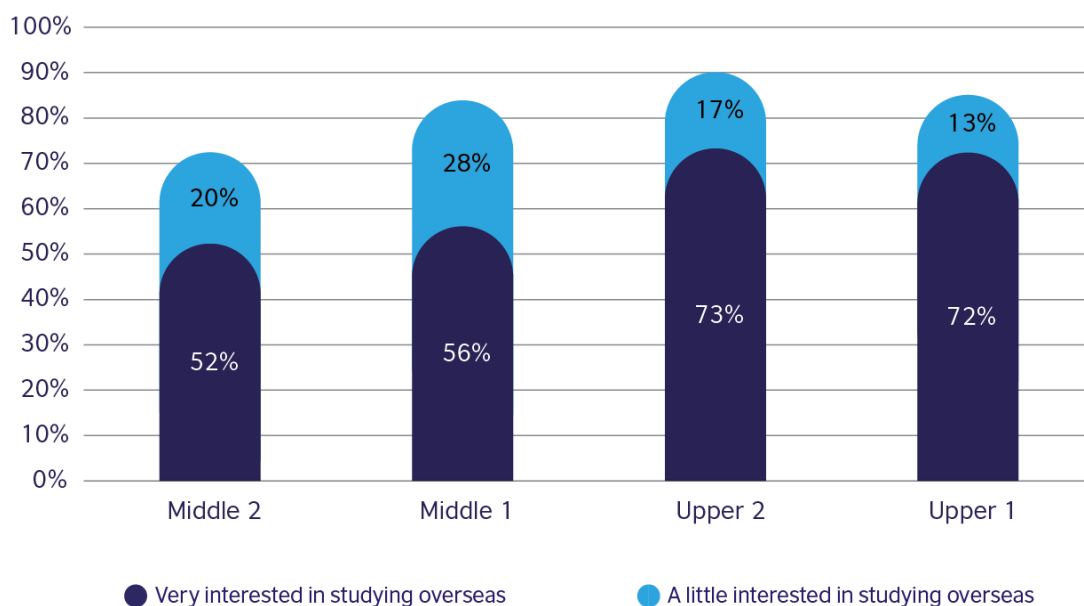
Focus group discussions also reflect a high level of interest in overseas education, even in the groups where this was not a factor for selecting participants. Overseas countries

were seen as having top-ranked universities offering high quality education, as well as promoting skills such as critical thinking, encouraging the freedom to question, and providing better student support and access to materials such as scientific journals. In contrast local education was seen as lacking variety, with rigid curriculums based on theory rather than practical applications. Beyond the subjects students will study overseas education was also valued as a way to see and experience the world outside of Indonesia.

Students at all levels of study expressed an interest in studying abroad, but this option was particularly attractive to students at higher levels – 57 per cent of students in the under-18 age group described themselves as “very interested” in overseas study compared to 66 per cent of those currently aged 21+. This corresponds with data for Indonesian students studying in the UK, where 61 per cent of new students in the 2019/20 academic year enrolled on postgraduate programmes.

Socio-economic status is also a predictor of opinions on overseas study. As noted in previous sections, Indonesians were divided into four SES bands based on a combination of factors including total household income and household size. While interest was high across all respondents, there were substantial differences between the groups, with 52 per cent of respondents in the lowest SES group saying they were very interested in studying abroad while more than 70 per cent of students in the top two bands gave this answer. However, there was no statistically significant difference between these top two groups.

**Figure 21: Students’ interest in overseas study by socio-economic status**

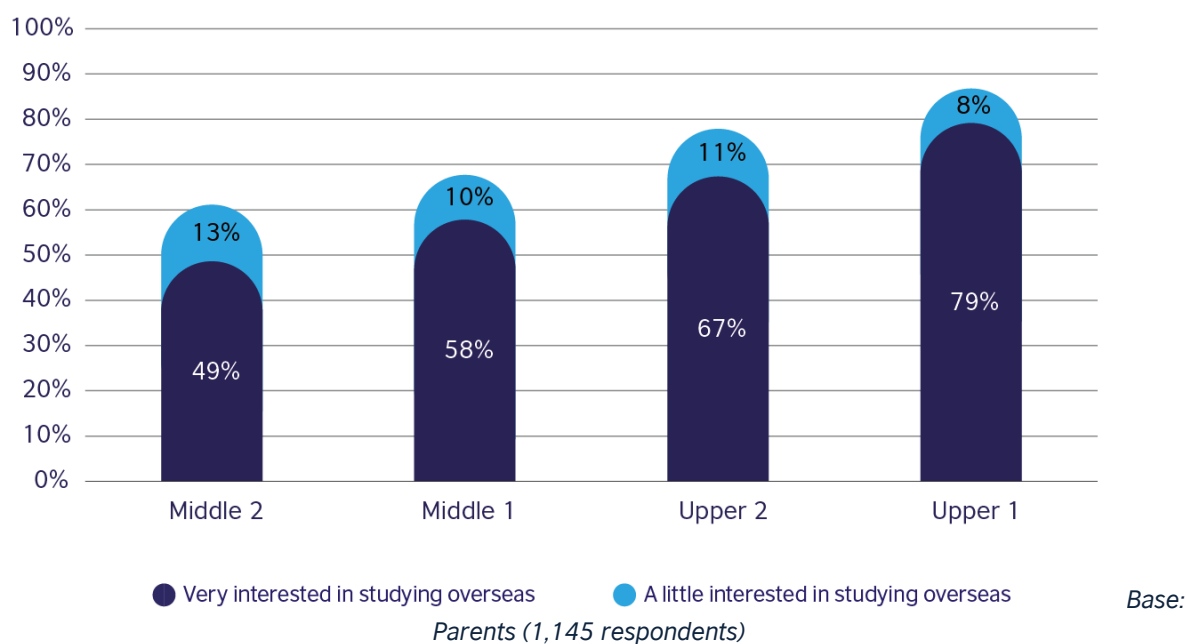


Base: Students (532 respondents)

This difference was even more pronounced among parents, with 79 per cent of the Upper 1 group saying they were very interested in sending their children to study abroad compared to 49 per cent of the Middle 2 band. In contrast to the students themselves there was a clear difference between parents in the highest and second-

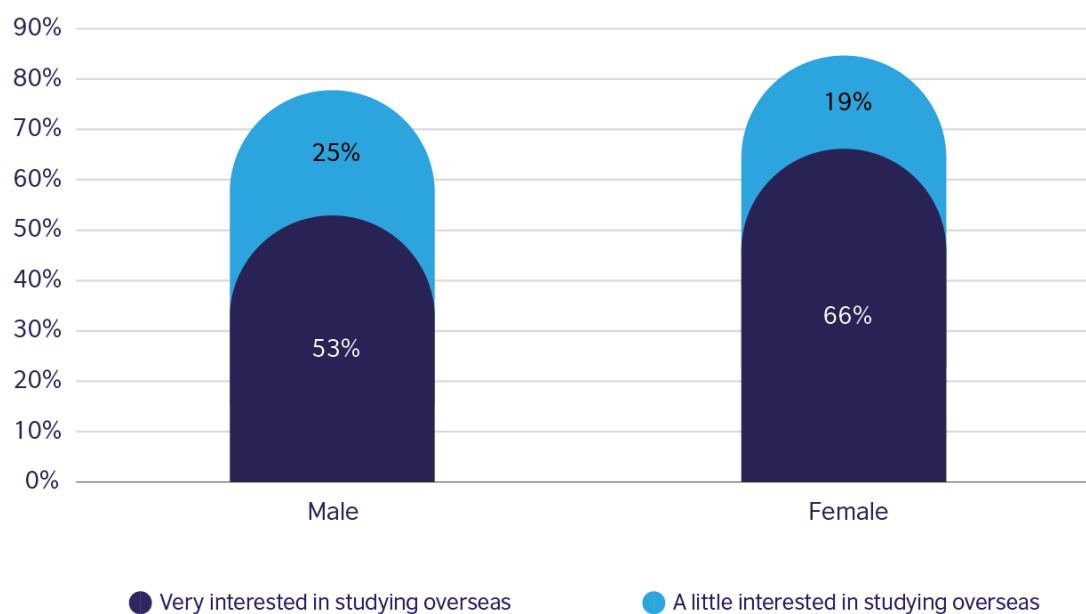
highest SES groups, which each group being substantially more interested in overseas study than the band below.

**Figure 22: Parents' interest in overseas study for their children by socio-economic status**



There was also a noticeable difference in attitudes between male and female students in Indonesia. While the proportion of male students saying they were very interested in studying abroad was a little over half, the proportion of female students giving the same answer was substantially higher at 66 per cent.

**Figure 23: Students' interest in overseas study by gender**



Base: Students (532 respondents)

This difference in interest contrasts with statistics from the UK's Higher Education Statistics Agency (HESA), which do not show a substantial gender imbalance in Indonesian students in the UK – male and female students each make up 50 per cent of the total after rounding to the nearest percentage point.

Looking at the geographical breakdown of interest in overseas study, students in West Java and Greater Jakarta were the most likely to describe themselves as very interested in overseas study, followed by North Sumatra and Yogyakarta. Parents in the Greater Jakarta region were also among the most likely to want their children to study abroad, along with those in Bali and Nusa Tenggara.

Education quality was the most important factor when choosing an overseas study location, according to survey results among students and their parents who expressed an interest in overseas study. Focus groups, which included a greater proportion of participants who were actively involved in applying for overseas study, showed a similar result – the most important factor according to this group was the course content and methodology, including teaching methods and balance of practical vs theoretical content, while the institution's history and reputation (including ranking and track record of past successful graduates) was also named as a critical factor.

Opportunities to work in a country after graduation were the second most important factor overall for students, although these fell behind safety among surveyed parents. This was a comparatively less important feature among the prospective students interviewed in focus groups, suggesting that it may play more of a role in the initial stages of students' initial interest than in their final decision-making process.

Meanwhile the cost of studying abroad was an important factor for both students and their parents, and affordability is a major hurdle when considering whether or not to go abroad. Several students and parents commented that availability of scholarships played into this decision, as it could make the difference between being able to study abroad or not.

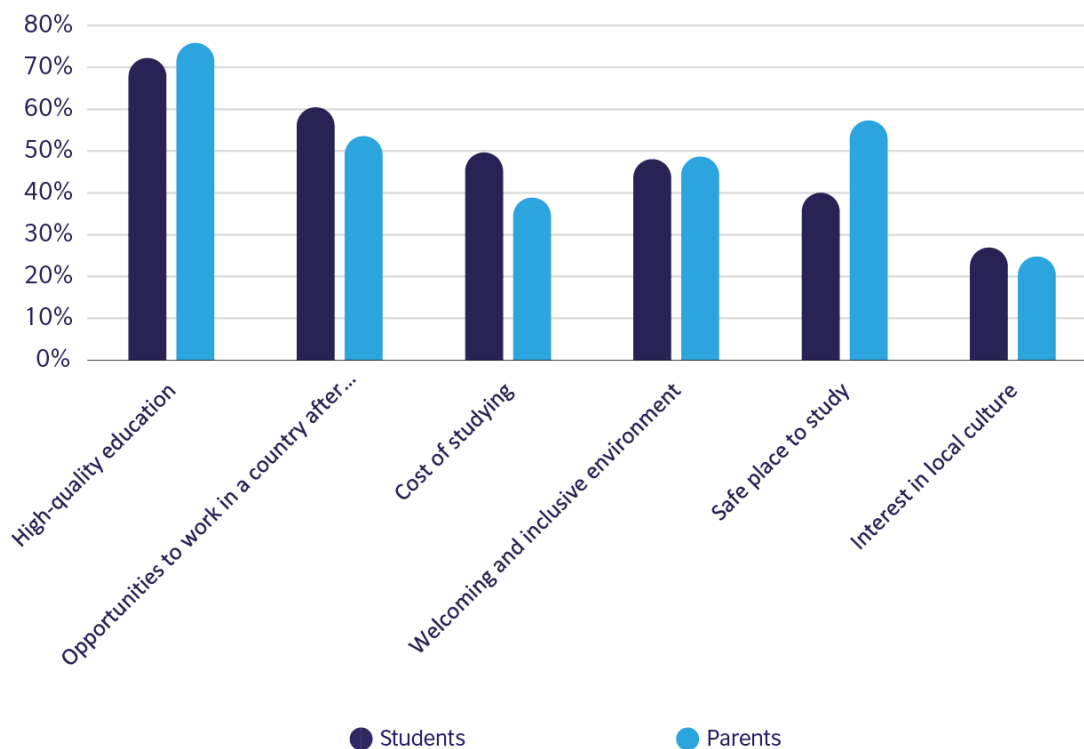
Slightly less than half of both students and their parents who expressed an interest in overseas study said that a welcoming and inclusive environment was among the three most important factors that would determine their study destination. Factors such as living environment and lifestyle were also described as important in focus groups, including cleanliness, accessibility and safety. However, survey responses showed that safety was a much more important consideration to parents than to the students themselves, with 57 per cent of parents seeing this as important compared to only 40 per cent of students.

A final factor listed by focus group participants was language – a lack of language barrier was seen as essential to successfully completing a higher education course abroad, which gave a strong advantage to English-speaking countries (including neighbouring Singapore) as well as to Malaysia.

Perceptions of the country's culture were seen as being of secondary importance. These do play a role to a certain extent, with one student summing up this attitude by saying that that *“adapting to [the local] culture will provide us with a smooth sailing*

*education journey*”, but focus group participants did not see this as being as important as other factors such as education quality. 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 (435 respondents) and parents interested in their children studying overseas (827 respondents)

Survey results showed that the UK performed poorly when Indonesians were asked about their preferred overseas study destinations. Among students who said they were interested in overseas study the country most likely to be named as their first-choice destination was Japan, followed by the US, South Korea and Australia. The UK ranked 6th overall, between Germany and Singapore, with only 8 per cent of Indonesian students naming this as their first-choice destination while a further 15 per cent named another country but said they would also be interested in studying in the UK.

This result was very different to survey findings in neighbouring Singapore and Malaysia, where the UK clearly stood out as the first-choice education destination. One important difference between these countries and Indonesia is the UK’s historical connections to Singapore and Malaysia, while Indonesians have less cultural familiarity as well as an education system which has less in common with that in the UK.

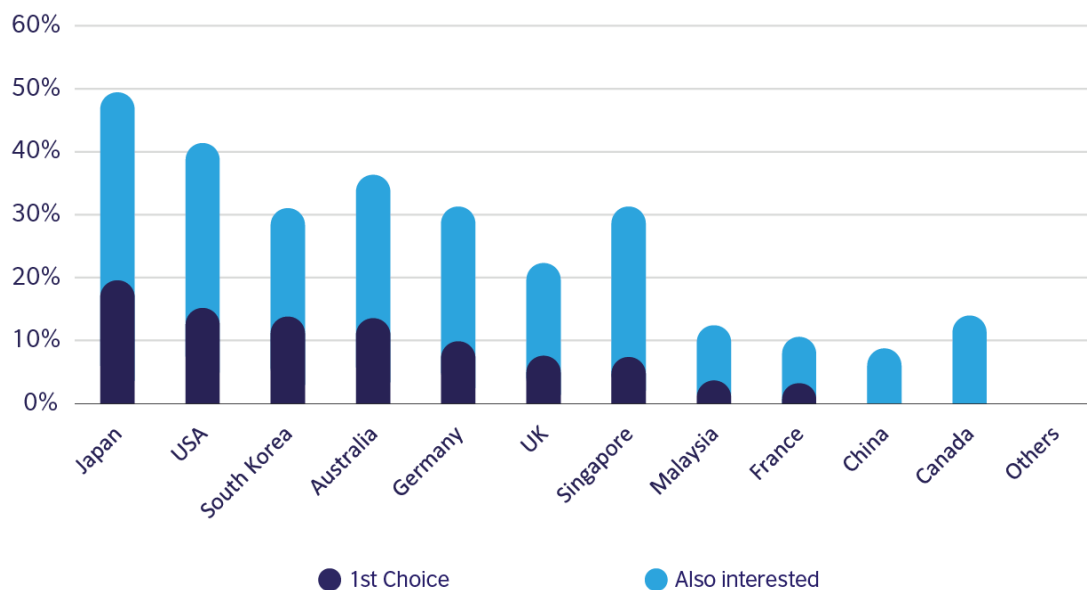
Statistics from the Japan Student Services Organization (JASSO) confirm that Japan is a popular study destination for Indonesians. 5,132 Indonesian students were studying at higher education institutions in the country in 2020, and this number has increased by more than 70 per cent over the last five years.

However, Japan's relative advantage over the UK in initial student interest as revealed by the survey is substantially stronger than its performance in terms of actual international student numbers. This suggests that as students look into overseas study options more closely they become relatively more interested in UK study – a finding that is supported by focus group research. Prospective international students who are in the process of applying to study abroad described the UK and the US as the countries with the strongest higher education systems, naming top world-ranked universities as well as broader advantages in the style of education in these two countries.

These prospective Indonesian international students saw the UK's education system as encouraging critical thinking and a greater focus on practical or applied aspects of education, especially in contrast to Indonesia's own higher education system which was described as having a rigid curriculum and focusing mainly on theory. Others described UK lecturers as more supportive than those in Indonesia and saw advantages in the way UK education encouraged discussions and asking questions, which they saw as especially suitable for *"those who are passionate about their studies"*. Some participants also mentioned the UK's strong history in education and in the sciences, talking about UK scientists' role in developing important theories.

While acknowledging the quality of UK education, several Indonesian students also commented on its cost which they saw as a significant disadvantage. Several talked about high tuition fees in the UK, which some students blame on the UK's education sector being *"too commercialized"* while others see the UK as an expensive place more broadly, commenting on the high cost of housing compared to prices in Indonesia. One common theme when discussing the price of studying in the UK was the relative lack of scholarships issued by UK universities or government bodies compared to other countries, with the UK described as *"stingy"* by one student. Germany, where higher education is cheap or free even for international students, was a common point of comparison.

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

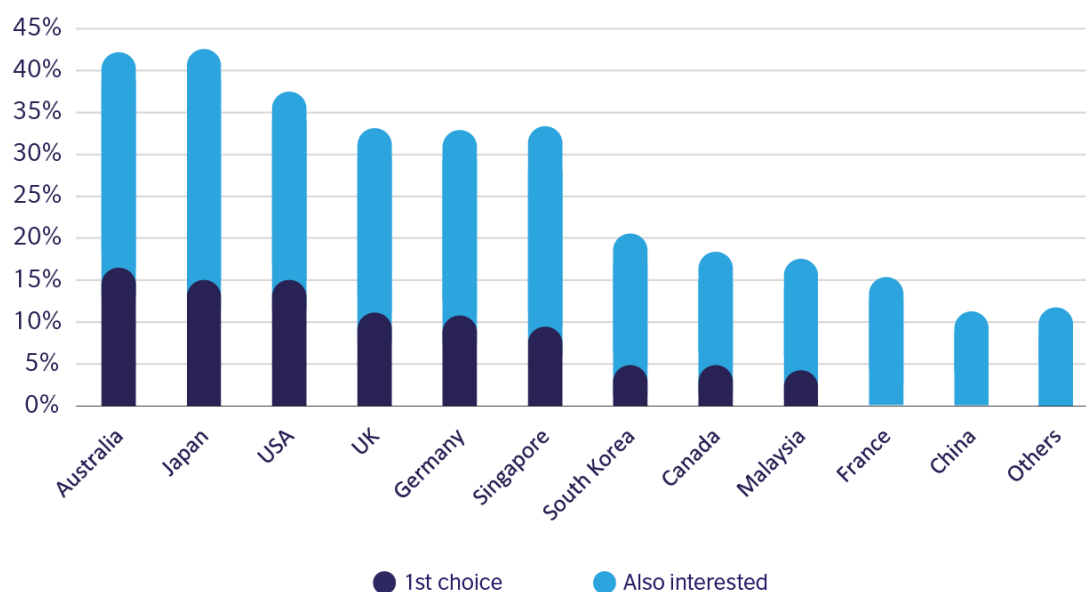


Base: Students interested in studying overseas (435 respondents)

Parents had a somewhat higher preference for Anglophone destinations, with the UK performing slightly more strongly in this group than among students – 11 per cent of parents who were interested in their child studying overseas named the UK as their top preferred destination, placing the country 4th behind Australia, Japan and the US. One country with a particularly large difference in performance between the student and parent groups was Korea, which was chosen as a first-choice destination by 14 per cent of students but only five per cent of parents.

Sentiments expressed by parents in focus groups were similar to those raised by the students themselves, seeing the UK as offering high-quality education but having high tuition fees and a lack of scholarships.

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



*Base: Parents interested in their children studying overseas (827 respondents)*

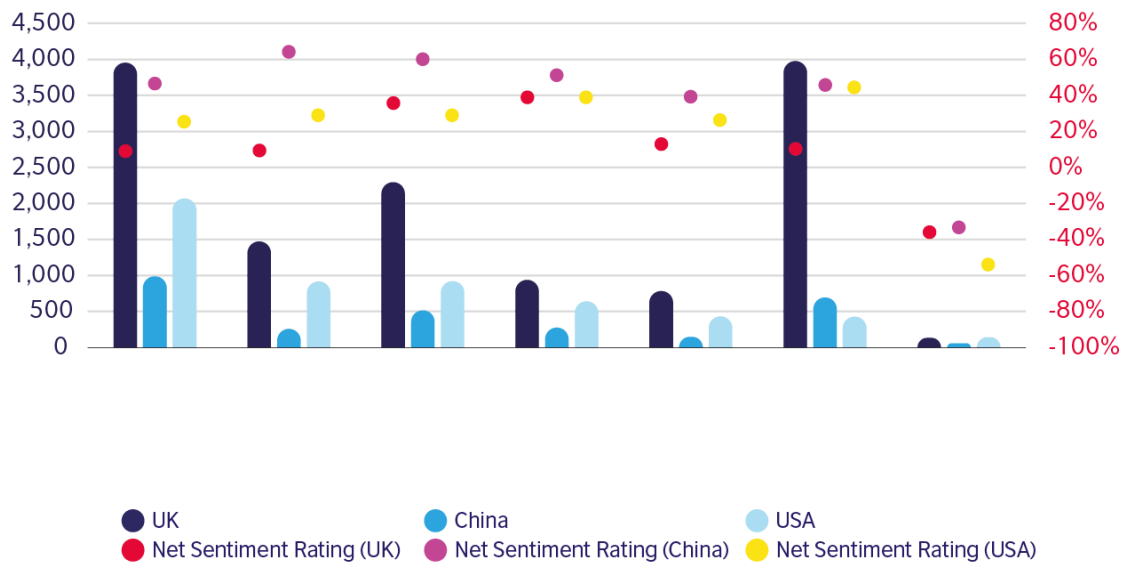
Discussion of the UK accounted for the greatest volume of posts about overseas study among these three countries, with the UK also having a distinct advantage in terms of net sentiment ratio in most sub-fields. Social media analysis shows that the future prospects such as employment opportunities make up the most common discussion topic in Indonesians' online discussions of education in three key countries (the UK, US and China). Success stories and discussion of career/life opportunities were shared extensively, and the change in work policy announced by the UK for graduating international students resonated on all top media sources - news, blogs, forums and Twitter. However, the uncertainties faced by international students trying to live in the US beyond the duration of education resulted in negative sentiments.

While future prospects were the top subject overall and in discussion of both the US and China, the largest topic for discussion of UK education was posts tagged as preparation and learning. Posts related to virtual information sessions, webinars about specific universities and courses offered on IELTS & TOEFL indicate the existence of a more organized network that supports students aspiring to study in the UK.

Posts implying excitement at going abroad for education were much more common for the UK and the US than for China, showing that western education is regarded as more prestigious. Meanwhile the online sentiment related to scholarship opportunities in the UK and other overseas countries was assessed as high due to a large amount of material informing students about various scholarships on Twitter and even Instagram; however this detected online sentiment was not mirrored in focus groups where students perceived a lack of scholarships for UK universities which they saw as a negative point for UK study.

One area where social media discussion was negative for all countries was racism and crime towards students. The US performed particularly poorly in this area, with both more discussion of this topic and a more negative net sentiment ratio, but both the UK and China also had sentiment ratios well below zero on this topic.

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

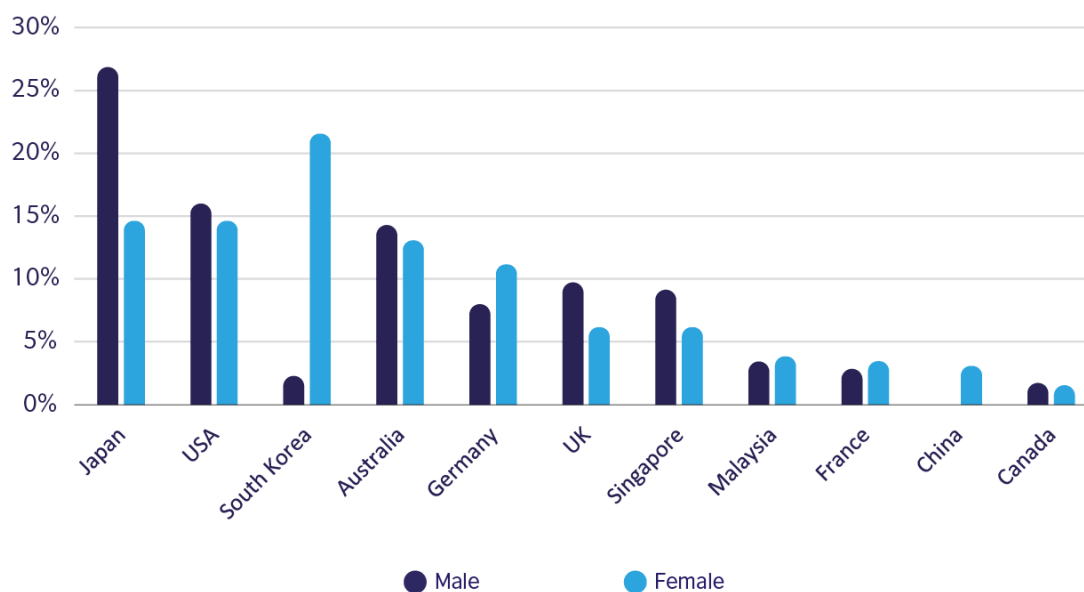


Base: Social media posts discussing education in the UK, US or China, June 2019 – March 2021

Breaking down the survey results by gender, the UK was somewhat more likely to be chosen as a first-choice study destination by male survey respondents, with 10 per cent of this group naming the UK as their top study destination compared to only 6 per cent of females.

Japan also had a noticeable advantage among male students, while the overwhelming majority of students that said they were interested in studying in Korea were female – 22 per cent of girls who said they were interested in studying abroad chose this country, compared to only 2 per cent of boys.



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

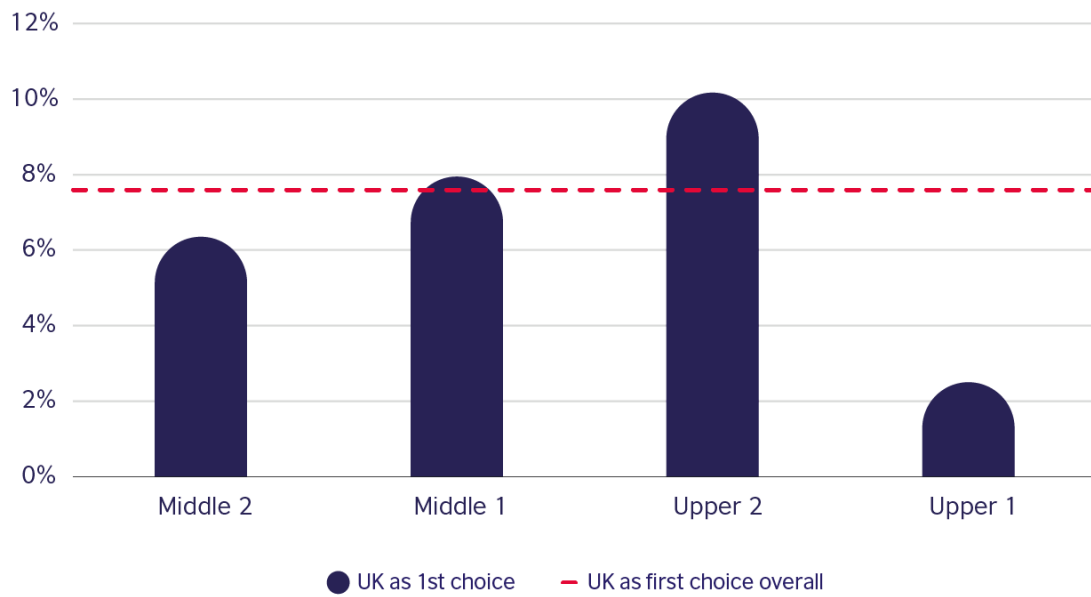
Base: Students interested in studying overseas (435 respondents)

Survey results by socio-economic status were inconsistent for the UK specifically, but looking at Anglophone countries as a whole the total proportion of students that wanted to study in an English-speaking destination increased as income levels grew.

Students' age did not appear to make a major difference to students' likelihood of preferring the UK, while regional differences were also not statistically significant given the comparatively small numbers of students involved.

Looking at the connection between country preference and the factors that students said were most important when choosing a country, the group most likely to choose the UK were those who named safety among their top three factors. Slightly over 10 per cent of this group named the UK as their first-choice destination, compared to a little under 8 per cent overall. In contrast the group least likely to choose the UK were those that said that opportunities to work in a country after graduation were important to them, which may be related to continuing perceptions of the UK as weak in this area despite the introduction of the new graduate route working visa policy.

**Figure 29: Factors seen as important by students considering overseas study**

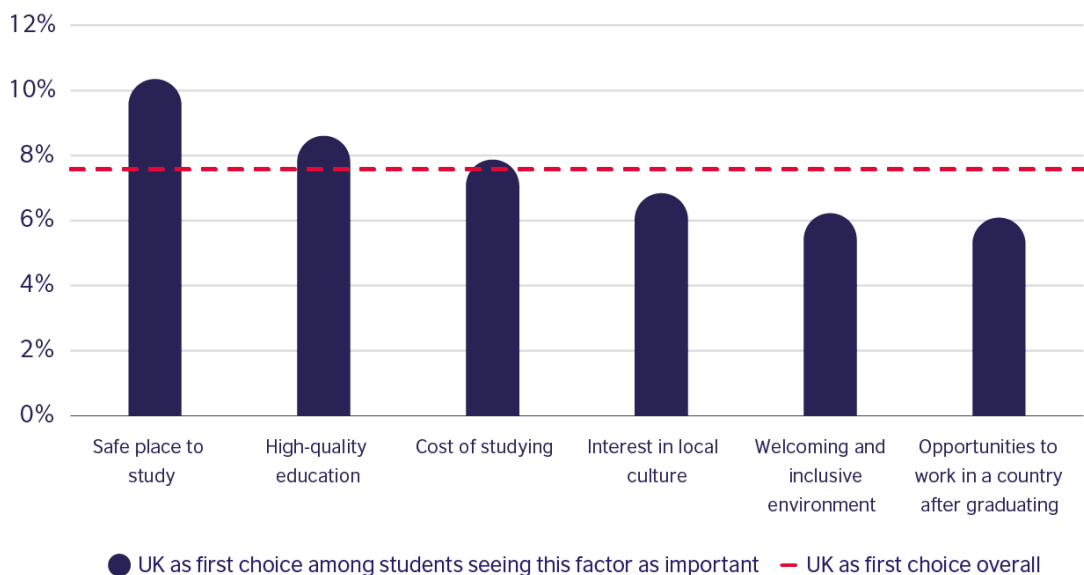


Base: Students interested in studying overseas (435 respondents)

#### 4.2 Interest in overseas travel

Most Indonesians have little or no overseas travel experience, with almost three quarters of survey respondents saying they had never been out of Indonesia. The most common destinations among those that have travelled abroad in the past were neighbouring Singapore and Malaysia, followed by Australia and Japan. Among those that had travelled abroad, the average number of overseas trips taken in 2019 was 1.8.<sup>4</sup>

**Figure 30: Previous travel experience by destination country**



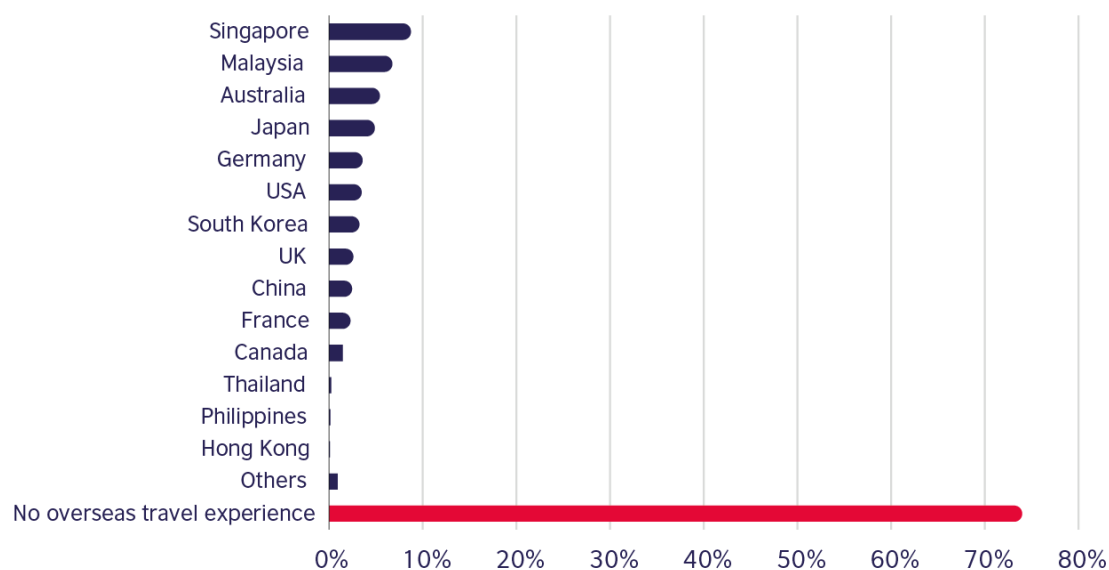
Base: All respondents in Indonesia (2,500 respondents)

<sup>4</sup> The survey specifically asked about 2019, as international travel in 2020 was affected by the Covid-19 pandemic.

While Indonesians expressed interest in travelling abroad once the pandemic subsides, the current Covid-19 situation impacted on most groups' attitudes towards overseas travel. Indonesian focus group participants were worried both about the risk of being infected as well as the disruption and hassle created by Covid prevention protocols.

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 61 per cent of survey respondents, followed by low cost, a rich heritage and culture, and a convenient visa policy.

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



*Base: All respondents in Indonesia (2,500 respondents)*

When talking specifically about Western countries, Indonesian focus group participants saw the opportunity to absorb history and Western culture as the most important reason to visit. Nature and scenery of kinds that don't exist in Indonesia are also attractive reasons to go abroad, including countries with four seasons rather than Indonesia's tropical climate. Talking specifically about the UK, Indonesians mentioned tourist spots like Stonehenge.

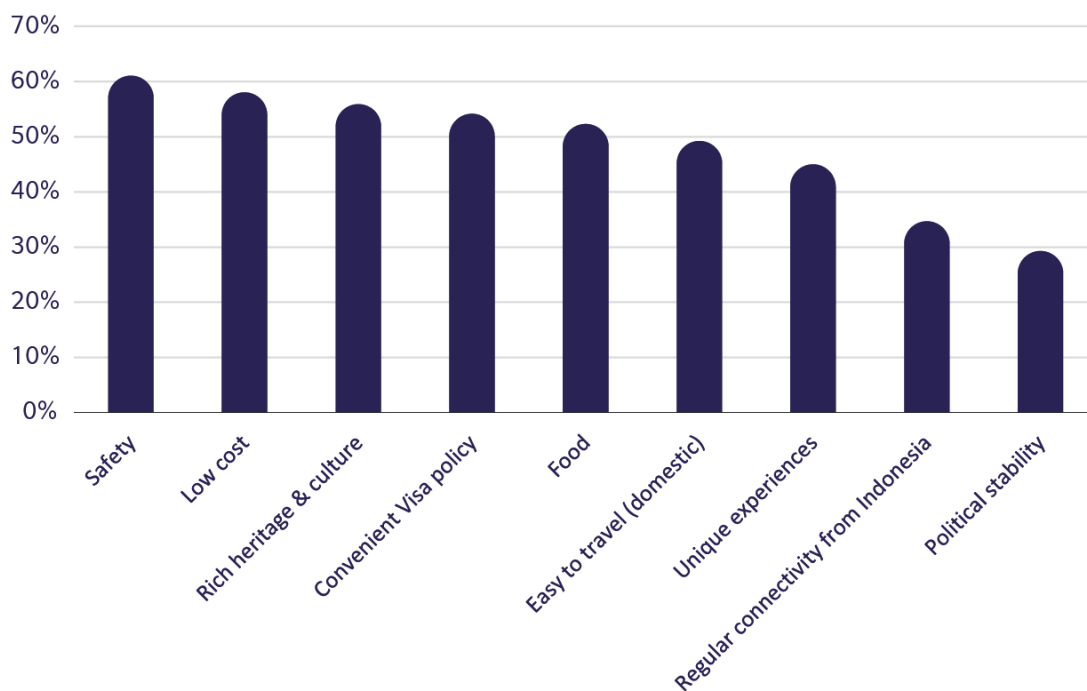
When talking about countries closer to home, food culture was a common selling point, while South Korea in particular was described as a "shopping paradise" with cheap and high-quality products. Other parts of the world were described as a "once-in-a-lifetime extraordinary experience", while Mecca in Saudi Arabia was mentioned by a number of focus group participants as a destination for religious pilgrimage.

When asked about their intentions to visit specific overseas countries, large majorities of Indonesians said they wanted to visit every individual country that they were asked about. Interest levels ranged from 85 per cent who said they wanted to visit South Korea to 62 per cent who said they wanted to go to Canada, with the UK being towards the bottom of the list with 66 per cent agreement.

Focus group participants also expressed interest when they were asked about their attitude towards travelling to the UK. They commented on visiting tourist destinations such as Stonehenge and Westminster Abbey as well as places associated with the royal family, watching football matches in the Premier League, and experiencing “high tea culture”.

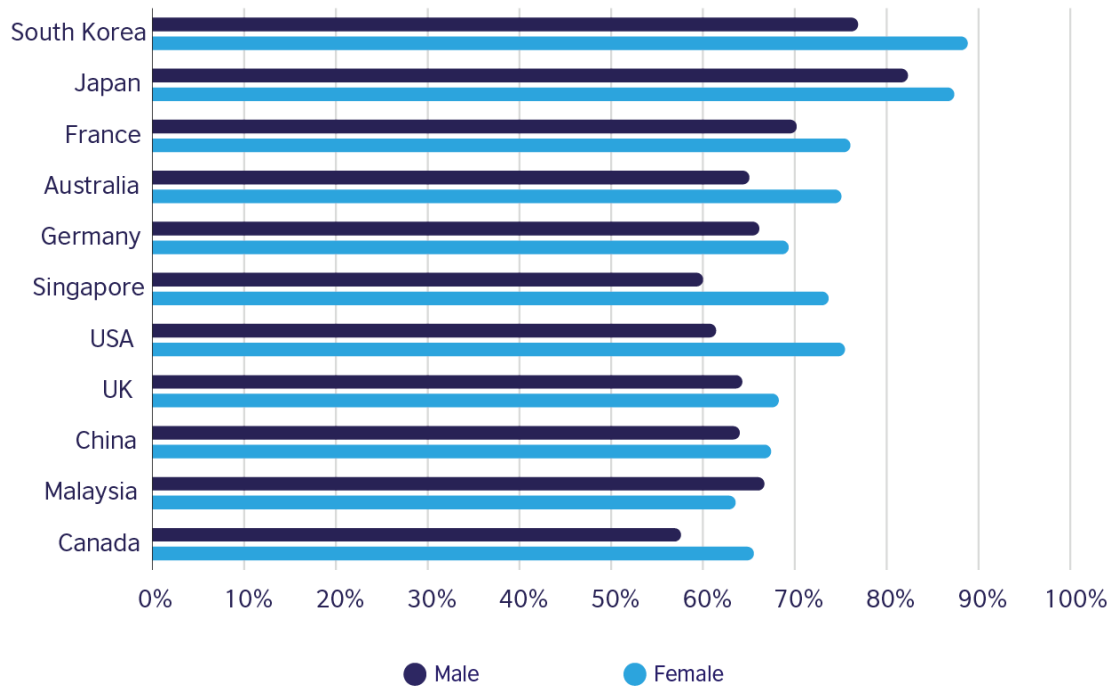
In general female Indonesians were more likely to express an interest in travelling abroad, with particularly large gender gaps for Singapore, the US and South Korea. However, this gap was comparatively small for the UK, which 64 per cent of male respondents and 68 per cent of female respondents wanted to visit.

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



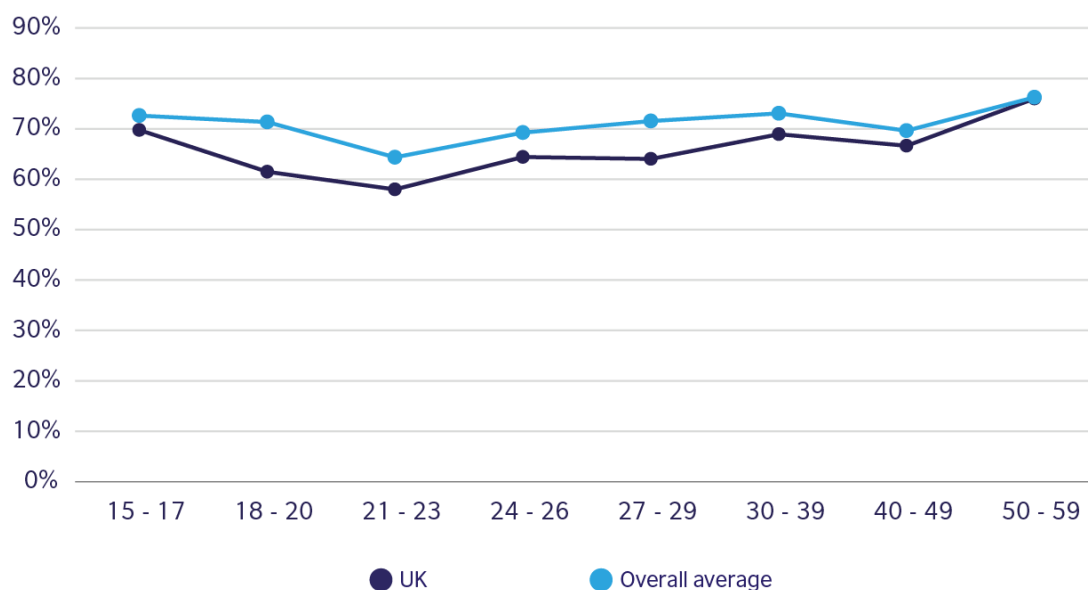
*Base: All respondents in Indonesia (2,500 respondents)*

The survey shows roughly similar levels of interest in overseas travel at all age groups, with an uptick among the oldest Indonesians aged 50+ - perhaps because this group are more likely to be retirees and so have more free time to travel. Interest in the UK is below the average across all overseas countries for most age groups but the size of this gap generally decreases with age, meaning that older Indonesians have a higher level of interest in travel to the UK compared to people in their early 20s.

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

Base: All respondents in Indonesia (2,500 respondents)

Interest in both overall overseas travel and travel to the UK is also strongly affected by socio-economic status, with a clear increasing trend as people become wealthier. 80 per cent of Indonesians in the wealthiest group said that they were interested in travelling to the UK, compared to 53 per cent in the least wealthy group. This trend was slightly more pronounced than the average across all overseas destinations, perhaps because travel to the UK is more expensive than visiting nearby countries like Singapore or Malaysia.

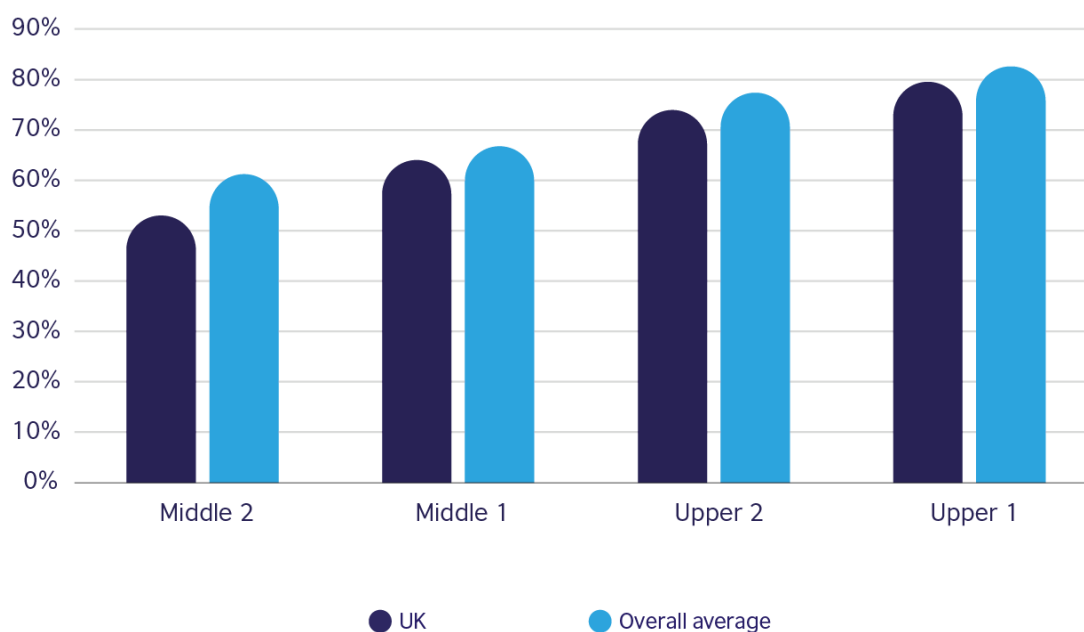
**Figure 34: Interest in travelling to the UK, by socio-economic status**

Base: All respondents in Indonesia (2,500 respondents)

By region, Indonesians living in the Greater Jakarta area (Jabodetabek) were the most likely to want to travel abroad, with an average of 79 per cent interest across all target countries. This was also the area with the highest level of interest in visiting the UK, which also stood at 79 per cent. Yogyakarta was the region with the second highest level of interest in overseas travel, while people in Sulawesi reported the lowest level of interest with an average of 64 per cent across all countries or 59 per cent for the UK.

Looking at the factors Indonesians say are important to their travel decisions, the group with the highest interest in travelling to the UK are those that named political stability as an important factor, followed by those that mentioned a convenient visa policy and regular connectivity from Indonesia. These factors do not appear to have a particularly strong connection with Indonesians' descriptions of the UK's advantages. However, the group with the lowest level of interest in travelling to the UK is those who say low cost is important, which aligns with focus groups respondents' description of the country as an expensive destination.

**Figure 35: Interest in travelling to the UK, by factors Indonesians see as important when deciding whether to travel to an overseas country**



*Base: All respondents in Indonesia (2,500 respondents)*

As with education decisions, cultural attraction also affects Indonesians' 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

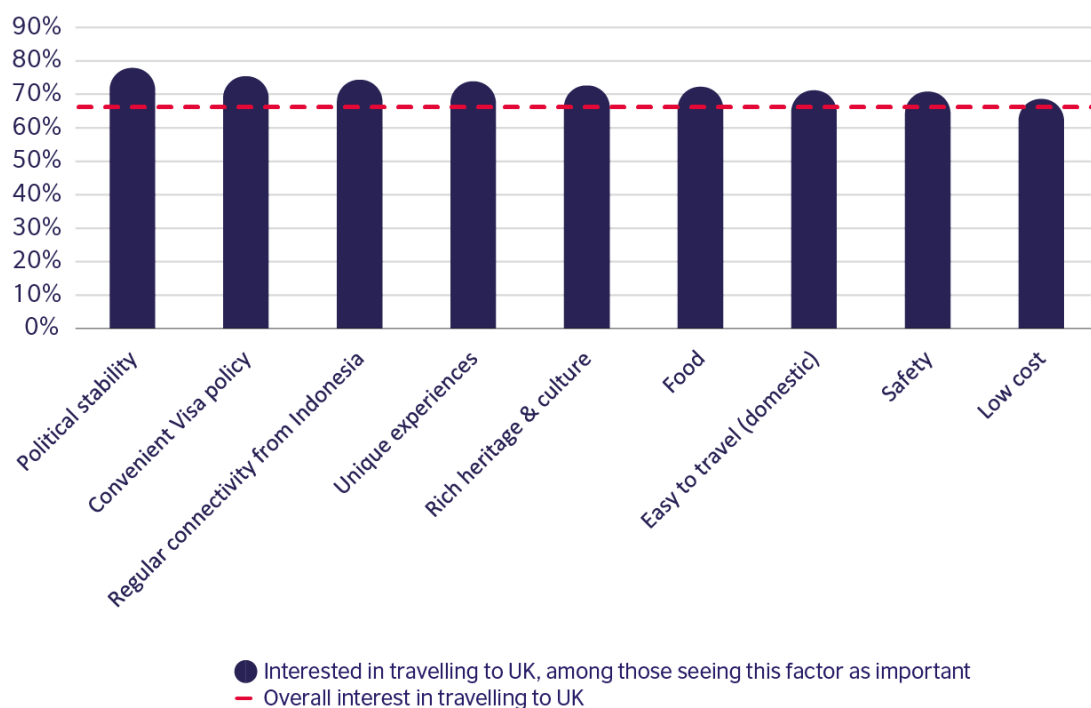
When asked about doing business with people from overseas countries, a large proportion of Indonesians gave a positive answer about any given country – ranging from 70 per cent for Singapore to 48 per cent for France and Canada. The UK performed relatively poorly compared to most other countries, with slightly over 50 per cent saying that they wanted to do business with British people.

Focus group responses suggest that, as with the questions on overseas study, this mainly represents passive interest in potential future business opportunities rather than actual plans to do business internationally, with most participants saying that they had no experience in this area. However, this was much more popular among the group of alumni from overseas universities, showing that international education and interest in cross-border business are closely linked.

When focus group participants were asked about potential partner countries the most-mentioned partners were nearby South East Asian countries as well as Japan, Korea, China and the US, with the UK not being mentioned. When asked specifically about the UK some Indonesians did have positive attitudes and no participants mentioned any barriers, but the level of interest seemed lower than for many other countries.

Interest in living abroad for a longer period was somewhat lower but a significant proportion of Indonesians still expressed interest. The UK was again less popular than most overseas countries, with 29 per cent of survey respondents saying they were interested in living there for an extended period (excluding overseas education courses) compared to an average of 35 per cent across all overseas countries. Singapore was a particular outlier here, with 61 per cent agreement compared to 39 per cent for the next most popular countries (the US and Germany respectively).

**Figure 36: Interest in doing business internationally or living overseas long-term, by overseas partner country**



Base: All respondents in Indonesia (2,500 respondents)

Male Indonesians were slightly more likely than their female counterparts to say they wanted to do business with other countries. In the case of the UK the proportion was 53 per cent for male respondents and 47 per cent for females, while most other countries had a similar gap. Age also had a substantial effect on interest in doing overseas

business, with older age groups substantially more likely to want to do business with the UK – 60 per cent of Indonesians in their 40s expressed an interest, compared to just 38 per cent in the 18-20 age group.

In contrast when survey respondents were asked about moving overseas for an extended period the gap was much smaller, with no significant gender difference for the UK and a comparatively small gap between different age groups.

When discussing the factors affecting doing business with an overseas country, Indonesian focus group participants saw the most important factor as the costs involved, including the cost to start a business and the amount of investment needed. Other important factors were the technological advancement of the partner country – with participants preferring advanced technology and leading products which can be imported into Indonesia – and favourable government policies such as openness, simple regulatory processes and low taxes. Survey results showed similar answers, with respondents naming the ease of doing business, cooperative government policies and convenient visa / immigration policies as well as good infrastructure. Cultural factors such as locals' attitude, sincerity and honesty were seen as important but only 20 per cent of Indonesians saw a country's heritage and culture as important factors for this decision.

When talking about desire to work in a country the most important factors for Indonesians were salary levels, career opportunities and quality of life. These factors were chosen by 69, 67 and 65 per cent of respondents respectively. Safety and convenient visa policies were also chosen by at least half of Indonesian survey respondents. Meanwhile when it comes to living abroad long term the top factors included a country's economic stability, health and safety, the language spoken, attitude towards foreigners and its geographic location were seen as the most important issues. Again, only a small proportion of respondents – 21 per cent in both groups – saw a country's cultural heritage as a major issue.

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

As with other ASEAN countries, research in Indonesia found a strong connection between interest in overseas culture, as well as a strong link between attraction to a particular country and intention to study in that country. Although interest in overseas culture was by no means the most important factor in students' decisions to study abroad, it nevertheless plays an important role.

This is illustrated by survey results showing a direct connection between self-reported interest in overseas culture and a student or parent's likelihood of saying that they are interested in overseas study. As shown in the chart below, more than 90 per cent of students and parents who described themselves as "very interested" in overseas culture said that they were at least somewhat interested in studying abroad or having their child study abroad, with more than 80 per cent of each group describing themselves as "very interested". Interest remains relatively high among students at all levels, with 44 per cent expressing at least some interest in overseas study even if they were not at all interested in overseas culture, but each successively lower level of interest in overseas culture is associated with a correspondingly lower level of interest in overseas study.



**Figure 37: Students' and parents' interest in studying abroad, by level of interest in overseas culture**

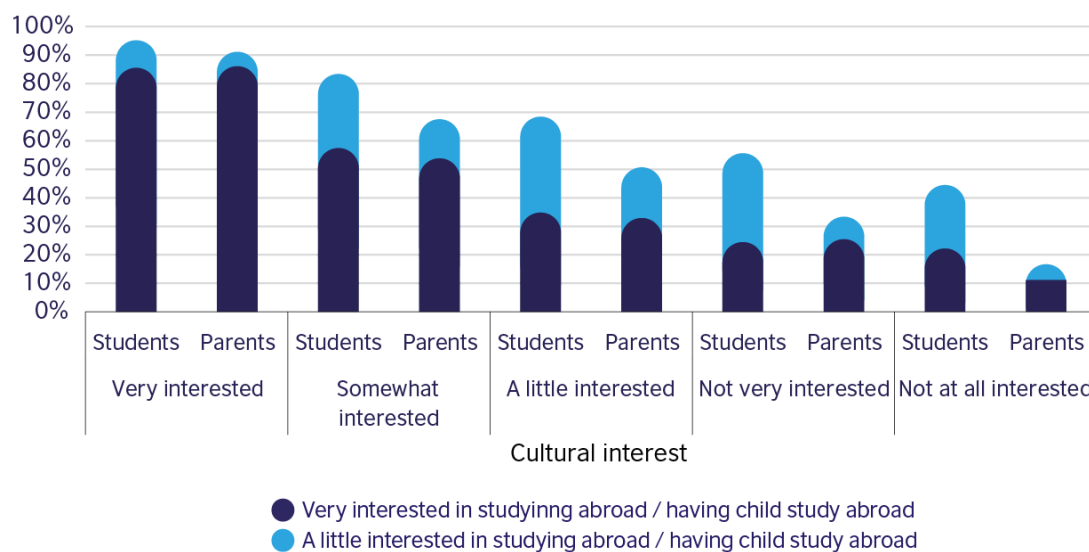


Base: Students (532 respondents) and parents (1,145 respondents)

When prospective overseas students and their parents were asked about the link between education and culture in focus groups, the general consensus was that culture was important to a certain extent as it will affect the overseas study experience, while experiencing the world outside of Indonesia was seen as an important element of the overseas study experience. The living environment in an overseas country, such as whether that country has an “orderly society”, was seen as a key element to study decisions.

However, descriptions of the importance a country’s culture were mainly limited to lifestyle and the character of the people. Relatively few people saw broader cultural aspects as comparably important factors like education quality and cost / scholarships.

A comparison between students’ top preferred countries in cultural terms and their preferred study destinations shows that there are substantial differences in the answers they gave to these questions. Among students who expressed an interest in studying abroad, almost 40 per cent named Japan as their preferred overseas culture and nearly 30 per cent named Korea, but the number naming these as their preferred education destinations was only half of that proportion. In contrast countries like the US and Australia were seen as much more attractive in terms of education than in terms of culture – 15 per cent named the US as their most preferred education destination compared to 5 per cent who preferred that country’s culture. The UK was slightly more popular as an education destination than for its culture, being the favourite of 5 per cent of prospective overseas students in cultural terms but chosen as a first-choice education destination by 8 per cent of this group.

**Figure 38: Students' preferred overseas culture and preferred study destination**

Base: Students interested in studying overseas (435 respondents)

As noted in the previous section, only around one in five survey respondents listed an overseas country's heritage and culture among the most important factors determining their interest in doing business with that country. However, focus group discussions showed that culture was still important to some extent, especially as it relates to understanding the behaviour and attitudes of local people, such as politeness and "the way they work"; this was seen as helping to avoid misunderstandings. This emphasis on cultural understanding as opposed to broader cultural interest or attractiveness was common across all focus group participants that were interested in overseas business.

When it comes to travel, culture took on a much more important role – more than half of survey respondents named a country's culture and heritage as an important factor to their tourism decisions, making this the third most important factor behind safety and cost. Focus group participants commented that they wanted to experience a country's culture through its people, food, history, architecture and other aspects, and in the words of one participant they "want to experience something that is different from Indonesia". Those considering travelling to the UK or another Western country saw a "Western world experience" as a key element of their trip, wishing to absorb different cultures and their history.

Culture was also seen as an important factor in decisions to live or work abroad for an extended period, with some focus group participants commenting that it is "essential to understand the culture" of a country that you were considering moving to – particularly but not only the people, lifestyle and environment – to ensure that it is a suitable place to live for an extended period.

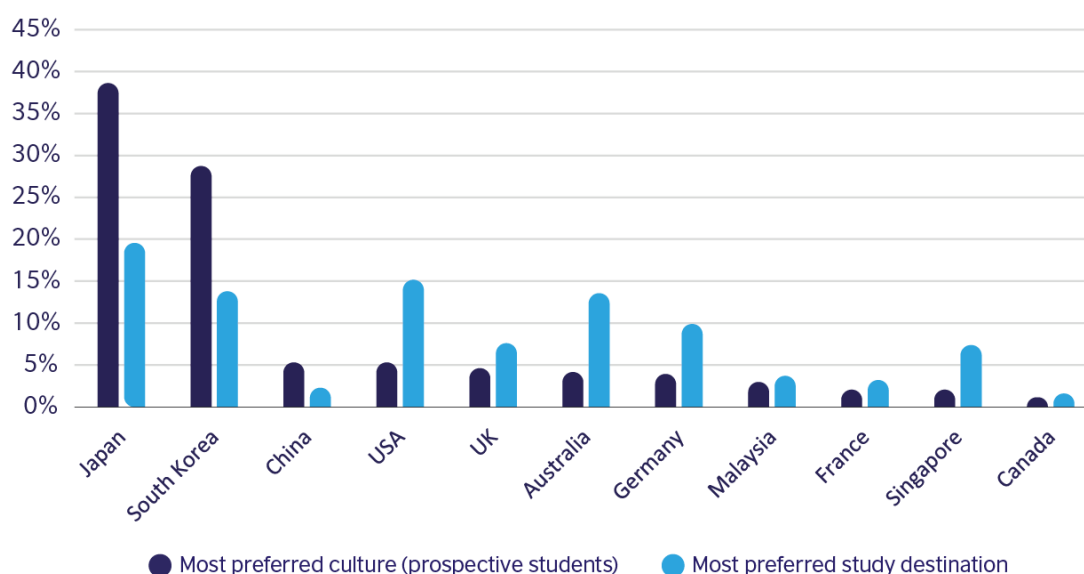
As mentioned above, when talking about their choice of study destination, overall cultural interest was described as a relatively minor factor with the main importance of culture being limited to lifestyle and the character of local people. However, a deeper

analysis of survey results shows that broader cultural interest has a stronger effect than prospective students consciously realise.

Among students that said they were at least somewhat interested in going on to future study abroad, more than 40 per cent 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.

The size of the gap was especially large in the UK, where 55 per cent of prospective overseas students who preferred UK culture also named the country as their preferred education destination – a far higher proportion than the 8 per cent of all students who gave this answer. Four other countries – Australia, Germany, the US and Singapore – also saw more than half of students preferring that country’s culture naming it as their first-choice education destination, in all cases well above the proportion of all respondents who wanted to study there.

**Figure 39: Students’ preferred study destination, overall and for students preferring this country’s culture**



*Base: Students interested in studying overseas (435 respondents)*

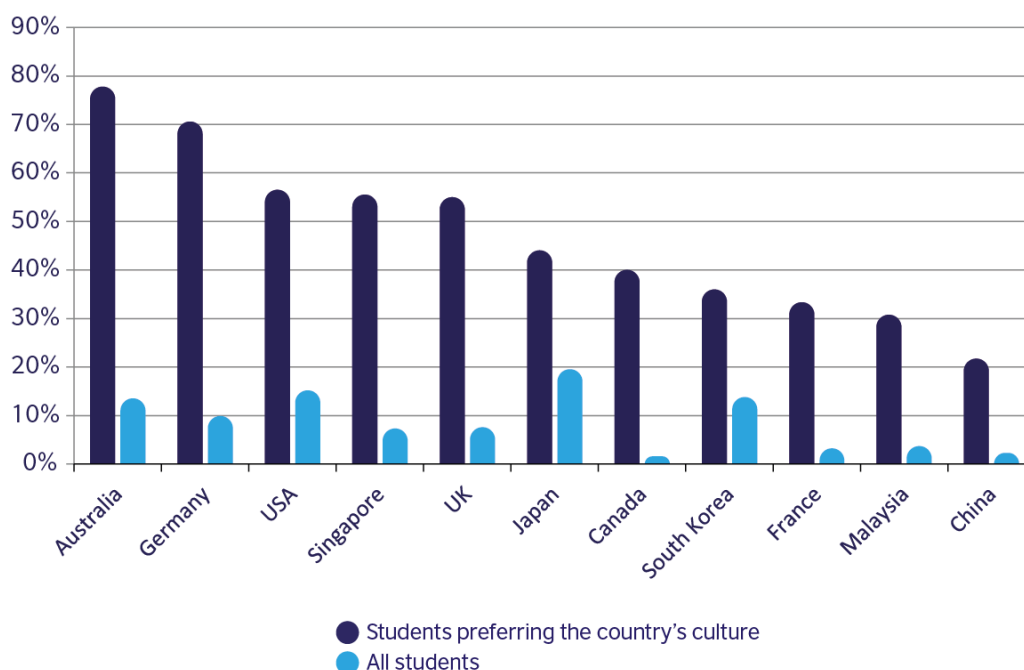
If study destinations beyond the first choice are also included, students preferring an overseas country’s culture are even more likely to say they want to study there. 85 per cent of prospective overseas students that preferred UK culture named this among the study destinations they were interested in, compared to only 22 per cent of the overall prospective student population. Similar patterns applied to other countries.

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 – in the case of the UK there was very little difference in this ratio between for students who said that culture was not something they consciously

considered when choosing a country compared to those that did see culture as an important factor.

Survey results show a similar effect on interest in overseas tourism. In almost all countries the proportion of Indonesians expressing an interest in travelling to the country was higher among those who said they preferred that country's culture than among the overall survey sample, with the UK seeing a particularly strong gap by this measure. Meanwhile Malaysia and Singapore were exceptions to the trend, perhaps because of these countries' cultural similarity with Indonesia.

**Figure 40: Interest in travelling to selected countries, overall and for Indonesians preferring this country's culture**



Base: All respondents in Indonesia (2,500 respondents)

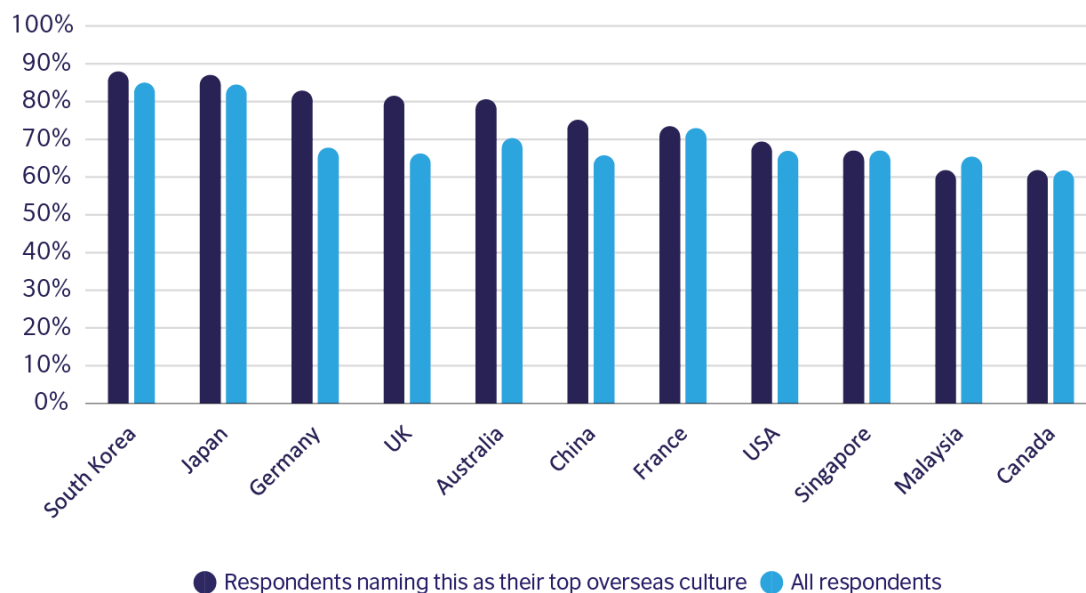
Despite a general attitude that cultural interest does not play an important role in business opportunities, Indonesians who saw a country's culture as attractive were substantially more likely to want to do business with people from that country. The UK was again the country with the largest gap between those preferring the country's culture and the general population; survey results showed that 69 per cent of the former group said they were interested in doing business with the UK compared to just half of the overall survey sample.

Malaysia and Singapore were again exceptions, which may again be due to the cultural similarity between these countries and Indonesia. South Korea was also an exception to the trend which is likely due to the country's cultural popularity being concentrated among younger people who as a group had less interest in overseas business partnerships.

As noted in the previous section, the proportion of Indonesians who will actually go on to do business with these overseas countries is likely much lower than the survey results

suggest – as with education this is measuring a very initial level of potential interest, which is only the initial stage of the filter before people decide to commit the time and resources necessary to do business overseas.

**Figure 41: Interest in doing business with partners in selected countries, overall and for Indonesians preferring this country's culture**



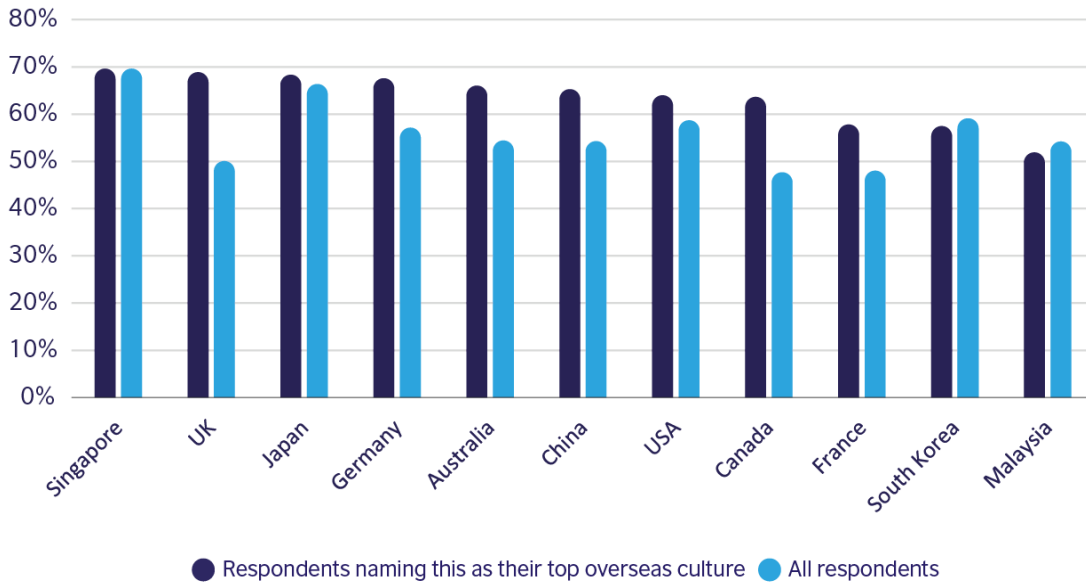
Base: All respondents in Indonesia (2,500 respondents)

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, 60 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 less than a third of the overall sample.<sup>5</sup>

In contrast to some other ASEAN countries, interest in different aspects of overseas culture did not greatly affect students' level of interest in overseas education. Students who named sports among their main overseas cultural interests were noticeably less likely to want to study abroad, while those expressing an interest in history and traditional culture were slightly more likely to be interested in overseas study and those interested in literature were the most likely to describe themselves as "very interested"; however interest in most aspects of overseas culture did not have a major effect on interest in overseas study.

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

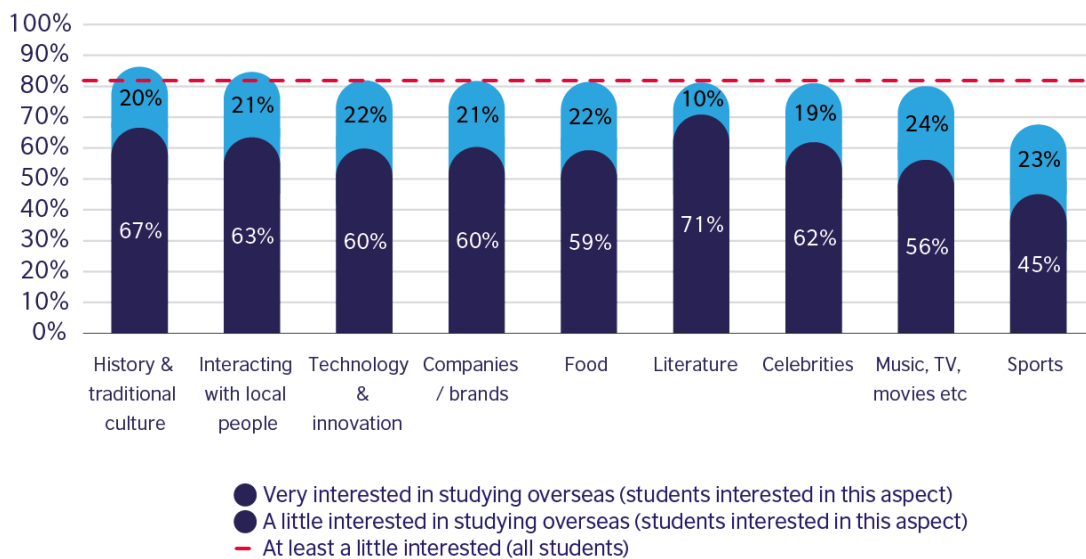
**Figure 42: Students' interest in studying overseas, by interested aspects of overseas culture**



Base: Students (532 respondents)

Interest in different aspects of overseas culture had a much larger effect on overseas country preference among those students that were interested in studying abroad. Students interested in overseas literature were the most likely to choose the UK as their preferred study destination, with 13 per cent of this group wanting to study in the UK. Meanwhile those who named countries / brands or celebrities among their top overseas cultural interests were much less likely to want to go to the UK, which was only around half as popular among this group as among all students who wanted to study abroad.

**Figure 43: Students' preference for the UK as a study destination, by interested aspects of overseas culture**



Base: Students interested in studying overseas (435 respondents)

Other countries show an even stronger pattern of differences by cultural interest. Among students who were interested in studying abroad and expressed an interest in overseas celebrities, over a third wanted to study in South Korea, compared to only 14 per cent overall. Looking at other major study destinations, Japan performed the most strongly among Indonesians that named popular media, technology, history or food among their top overseas cultural interests while the US did best among those who mentioned companies / brands.

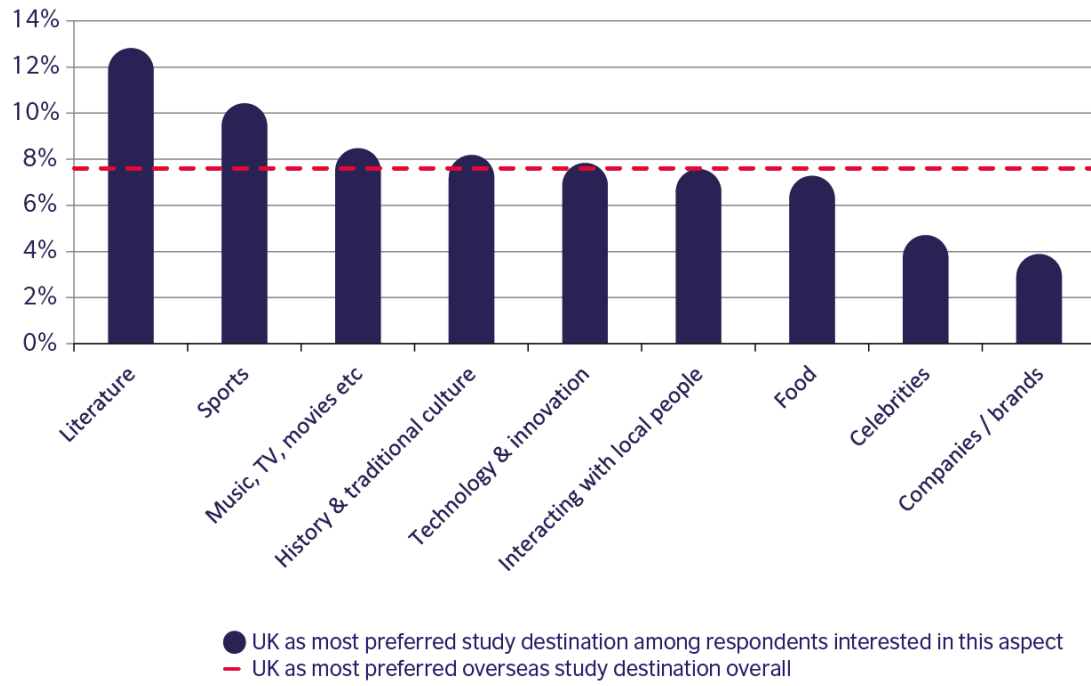
Beyond attitudes, there is also a strong connection between physical visits and interest in studying in a country. While too few prospective Indonesian students had travelled abroad for the results to be statistically significant for any one country, overall students who had visited a country in the past were substantially more likely to name that country as their top overseas study destination.

In comparison to education purposes there was relatively little variation in Indonesians' interest in visiting the UK based on the aspects of overseas culture they are most interested in. The group with the highest proportion wanting to travel to the UK was those interested in interaction with local people and in history & traditional culture, with 72 per cent of both groups wanting to visit the UK compared to 66 per cent of survey respondents as a whole. In contrast those interested in sports, celebrities or companies / brands were the least likely to want to visit the UK.

The UK results were similar to those across all countries, which also saw people interested in interaction with local people or in history or traditional culture being more interested in visiting while those naming sports, companies / brands or celebrities among their top cultural interests were less likely to want to travel abroad.

Finally, interest in doing business with partners in the UK was influenced by interest in some aspects of overseas culture. People who described themselves as interested in overseas literature were comparatively more likely to want to do business with UK partners, while those interested in celebrities were less likely than average to be interested in cooperating with a UK business partner.

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



Base: All respondents in Indonesia (2,500 respondents)



## 5. CONCLUSIONS

This report has shown that Indonesians report a relatively strong level of interest in overseas culture, albeit to a lesser extent than most other ASEAN countries. However, the UK is not seen as one of the most attractive countries in terms of culture. While online discussion of different aspects of UK culture was on the whole favourable, only 5 per cent of respondents to a large-scale survey named the UK as having the most interesting culture among a list of overseas countries. This puts the UK far behind Japan and Korea in terms of cultural interest as well as being slightly behind the US. In general the UK is seen as a modern, developed and “civilised” country, but also as somewhat conservative.

Research in Indonesia showed that the UK performed more strongly in the field of education than in terms of overall cultural interest. This was particularly among focus group participants who were more actively engaged in preparing to study abroad, with this group seeing the country as having world-class universities and good teaching methods but also as an expensive study destination. Among the broader student population the perception was less positive, being less likely to be preferred compared to several major competitors, but the UK was still seen as relatively more popular in terms of education than in terms of culture as a whole.

In contrast the UK was seen as less competitive in other areas such as media or technology. There is generally low awareness of UK media with many people saying that they have difficulty distinguishing between UK and US content; meanwhile there is also low awareness of the UK’s advantages in science and technology and Indonesians do not generally associate the country with technological progress.

As with their counterparts in other ASEAN countries, when Indonesians 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, Indonesian students who described themselves as “very interested” in overseas culture were 50 per cent more likely to say that they were very interested in studying abroad compared to those describing themselves as “somewhat interested”, and more than three times as likely to say this as those describing themselves as “not very interested” or “not at all interested”. Among students expressing an interest in studying abroad, those who named the UK as their favourite overseas country in cultural terms were also around three 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 60 per cent

of surveyed students described themselves as “very interested” in studying abroad, while data from UNESCO shows that the true proportion of Indonesian tertiary students studying overseas is lower than one per cent. The proportion of Indonesians who would realistically be likely to engage in trade or business with the UK is also likely to be substantially lower than the proportion of survey respondents who expressed interest in this.

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