



TNE Institute

# TNE Institute UK x Voyage

Mapping South East Asian Student  
Perceptions of UK TNE offerings  
across the region

February 2026





# What's Inside

---

## **Purpose & Scope**

## **Foreword**

## **Executive Summary**

## **Quantitative Analysis**

- Data Overview
- Demand Overview
- Sentiment Analysis
- Emotional Deep-dive

## **Qualitative Analysis**

- Competitive Landscape
- Thematic Analysis
- Student Voices Deep-Dive

## **Strategic Implications**

## **Appendix**



## Purpose

The UK is actively expanding its transnational education (TNE) footprint across Southeast Asia, with recent announcements and bilateral discussions signalling renewed partnership ambitions across the South East Asian region.

Against this backdrop, this report provides a deep dive into how students perceive UK TNE pathways across six priority Southeast Asian markets: Singapore, Malaysia, Indonesia, Vietnam, Thailand, and the Philippines. The aim is to understand how prospective and current students are interpreting opportunity, value, risk, and outcomes within an evolving regional education landscape.

Drawing on real-time monitoring of student voices via the Social Source platform, this report captures experiences and sentiment as they develop, which might otherwise go unheard. The objective is to generate timely, evidence-based insight into how audiences interpret the value, credibility, accessibility, and outcomes associated with UK-linked TNE providers and offerings delivered in the market.

By listening to these often underrepresented student perspectives and analysing their reactions as they unfold, the report is designed to provide fresh perspectives and novel insights to support the UK government, UK TNE Institutions, and wider sector stakeholders in identifying emerging concerns, expectations, and opportunities for targeted engagement. These insights can help shape communications, recruitment strategies, and support frameworks that enable stronger enrolment outcomes as new partnerships come online.

## Scope

This report analyses student voice across six priority Southeast Asian markets: Malaysia, Singapore, Indonesia, Vietnam, Thailand, and the Philippines. Together, they reflect different levels of TNE maturity, regulation, and awareness, providing a regional view of how UK provision is understood.

As Malaysia and Singapore function as major education hubs, the study also captures perspectives from key sending countries driving demand. For Malaysia, this extends to include India, Bangladesh, Pakistan and China, and for Singapore, India and China.

While this report includes Chinese student perspectives, coverage at this stage is not exhaustive. China remains one of the most significant sending markets to Malaysia and Singapore, and expanded coverage of Chinese-language platforms will be incorporated in subsequent phases of analysis. A dedicated follow-up report will examine the China market in greater depth and detail.

The analysis spans January to December 2025.

Social Source employs social listening as its core methodology, gathering publicly available conversations through an extensive multilingual keyword framework. Queries capture student characteristics such as nationality, level of study etc., student intent, and decision drivers, alongside references to delivery models, partnerships, and UK providers operating in-market. All analysis is conducted on anonymised, publicly available conversations. No personally identifying information is collected, stored, or analysed.

The full thematic definitions and metric explanations underpinning this analysis are outlined in the Appendix.

## Data Sources



# Foreword

(TNE Institute UK x Voyage)

**The United Kingdom's ambitions for transnational education (TNE) are entering a pivotal phase. As the International Education Strategy evolves beyond recruitment targets toward sustainable global partnerships, the expansion of high-quality UK provision overseas is becoming an increasingly central pillar of the UK's international education agenda.**

Southeast Asia sits at the heart of this ambition. The region combines demographic growth, economic dynamism, and rising demand for internationally recognised qualifications. Yet ambition alone is not sufficient. The long-term success of UK TNE depends not only on institutional capability and regulatory alignment, but on how students themselves understand, evaluate, and trust the offerings available to them.

This report represents a shared commitment between TNE Institute UK and Voyage to place student voice at the centre of strategic decision-making. By combining sector expertise with real-time social listening, we capture how prospective and current students are navigating UK-linked TNE pathways across six Southeast Asian markets. These are not curated survey responses, but organic, peer-to-peer deliberations occurring in multilingual digital communities where decisions are actively shaped.

The findings are both encouraging and instructive. UK TNE is widely recognised as credible and accessible, particularly in comparison to the rising cost and uncertainty surrounding onshore study. However, recognition does not automatically translate into conviction. Students are rigorous, comparative decision-makers. Career outcomes, degree equivalence, and employer recognition ultimately determine consideration and conversion.

For universities and government stakeholders alike, the implications are clear: brand strength must be reinforced by transparent evidence, credible outcome signalling, and clear articulation of what UK TNE represents across markets at different stages of maturity.

We hope this report contributes meaningfully to ongoing dialogue within the UK and across Southeast Asia, supporting evidence-based strategy, stronger partnerships, and improved outcomes for students.



**Dr Cheryl Yu, SFHEA**  
Executive Director  
TNE Institute UK



**Matthew Donlon**  
Founder & CEO  
Voyage



# Executive Summary

## A pivotal moment for UK Transnational Education (TNE)

The United Kingdom's ambitions in TNE have rarely been more prominent. The Government's International Education Strategy (IES) 2026 aims to boost education exports to £40 billion annually by 2030. It shifts away from the previous 600,000 international students target, focusing on more sustainable, high quality and diverse recruitment, and the strategy offers strong encouragement for UK institutions to expand their physical and digital presence overseas through TNE.

Supported by the British Council, the recent policy signals a clear commitment to deepening the UK's global educational reach and TNE is at the forefront of this new strategy. Southeast Asia sits at the heart of this ambition. Recent bilateral announcements and the region's continuing demand for internationally recognised qualifications make it one of the most strategically important markets for UK higher education.

Whilst the ambition is clear and can be seen as a pivotal divergence in the UK's historical policy towards higher education, the ambition alone is insufficient. As British Council market intelligence has consistently highlighted, the success of UK TNE depends not only on institutional infrastructure, regulatory frameworks, cultural and educational awareness and local expertise, but on how students themselves understand, evaluate and trust the quality and authenticity of the offerings available to them. This is precisely the gap this report addresses.

## A novel approach: listening to the student voice at scale

Over the last decade or so the 'student voice' has become an increasingly important consideration for UK universities. The Office for Students makes it essential for UK institutions to engage with their students to enhance the academic experience. The student voice is heard throughout institutions and, over the last few years, has shifted from 'feedback' to 'partnership'. It is appropriate, then, that the student voice should also inform institutional approaches to TNE.

This report, produced jointly by TNE Institute UK and Voyage, represents a novel contribution to the evidence base on UK TNE in Southeast Asia. Rather than relying on surveys, recruitment data, or policy consultation, it draws on real-time social listening, capturing over 1,300 organic, student-led conversations across six priority markets for UK TNE: Indonesia, Malaysia, Singapore, Thailand, Vietnam, and the Philippines. These are the unfiltered voices of prospective, current, and former students as they navigate (or help others to navigate) one of the most consequential decisions of their lives — the choice of their international education journey.

This methodology is significant. Policy development and institutional strategy have historically been informed by what stakeholders tell decision-makers in formal settings. What students say to each other, on Reddit, across other social platforms, in multilingual peer communities, is rarely captured systematically. However, this is inevitably the raw and unfiltered data that could aid the decision making and strategy of international offices and partnership development teams across UK universities. This report offers policymakers and university leaders an evidence base grounded in authentic student deliberation rather than curated feedback.



# Executive Summary

## What the Evidence Reveals

The findings are both encouraging and instructive. UK TNE provision is often viewed by Southeast Asian students as a **credible, accessible and financially pragmatic pathway to globally recognised qualifications**. Sentiment towards UK TNE is meaningfully more positive than towards onshore UK study (net sentiment +0.09 versus -0.72), reflecting the **relative attractiveness of TNE in the current landscape**.

At the same time, students are increasingly **sophisticated comparative decision-makers**. **Career outcomes** and **educational quality** account for over half of all conversations that were analysed, and students actively **benchmark UK TNE against strong domestic universities, other branch campuses (most often, Australian), and onshore UK study**. The data reveals that trust is built more through peers and less on institutional messaging, and that information gaps include:

- TNE vs onshore degree equivalence
- Employer recognition of TNE
- Programme structures

## Implications for Policy and Practice

The strategic implications are clear and actionable. For **UK universities** and **local UK TNE providers**, the priority is to move beyond brand reliance toward outcome-led evidence, demonstrating degree equivalence, employability data, and alumni progression in formats that resonate with target communities. Institutional reputation may open doors, but it is not sufficient. Credibility will depend on authentic educational experience and meaningful engagement with local stakeholders.

For **government stakeholders**, clearer articulation of what UK TNE represents can unlock demand in cost-sensitive markets such as Indonesia, while reinforcing system-wide outcome signalling that supports the UK's quality assurance reputation.

These remain significant sources of friction in the decision-making process.

Market maturity varies across the region.

- Malaysia and Singapore host established TNE communities centred on flagship institutions (notably Nottingham's Malaysia campus and the Singapore Institute of Management–University of London partnership).
- Indonesia and Vietnam represent high-growth opportunities where awareness-building and value clarification are immediate priorities.
- Thailand and the Philippines are at an earlier stage, calling for foundational trust-building and sustained visibility investment.

UK TNE also aligns with emerging regional priorities. Governments across Southeast Asia are increasingly attentive to outbound capital flows and graduate retention. Well-structured TNE partnerships retain tuition spend domestically, strengthen local institutions, and reduce large-scale outward mobility. This alignment with national development objectives may become strategically important as governments balance internationalisation with domestic capacity-building.

The **data confirms that Southeast Asia is a high-leverage opportunity**, not a low-interest market. Student engagement with UK TNE content is strong; what is missing is a consistent flow of credible information in the digital and peer networks where decisions are shaped. **Targeted investment here could deliver outsized gains in consideration and conversion.**



# Quantitative Data Overview

Key Insights from online conversations

## Data Overview

### Data suggests an emerging TNE landscape in SEA

Over the past year, approximately **1.3K student-led** conversations related to UK transnational education (TNE) were surfaced across Southeast Asia. Much of this conversation was **concentrated within the digital spaces of Malaysia and Singapore.**

**Australian TNE Institutions generated marginally higher mention volume** within SEA student conversations. However, UK TNE Institutions followed closely, **capturing nearly 76% of Australian TNE share-of-voice** (1.3K vs 1.7K mentions). This reflects an **emerging TNE landscape** where awareness and active evaluation remain concentrated among **smaller, digitally engaged and information-driven student segments.**

Conversations around UK TNE Institutions saw notably higher engagement and reach than Australian TNE Institutions. On average, UK TNE Institutions generated approximately 62 engagements per mention against Australia TNE's 29 engagements per mention, suggesting that **UK TNE Institutions see more active peer interaction despite lower absolute mention volumes.** Reach metrics also suggest that **UK TNE-related discussions are achieving relatively higher visibility** within the broader student community and shaping early perceptions beyond direct participants.

**Key Insight:** Southeast Asia represents a high-leverage opportunity rather than a low-interest market for UK TNE Institutions. The constraint is not relevance, but limited visibility and a lack of steady, reliable flow of information to students looking to make informed decisions. Even modest increases in awareness led by UK universities and government could deliver outsized gains in reach, influence, and consideration.

## Comparative Analysis:

### Volume, Engagement and Reach (UK TNE Institutions vs Australian TNE Institutions)

UK TNE Institutions	1.3K Total Mentions	80.3K Total Engagement	2.1M Total Reach
AUS TNE (Benchmark)	1.7K Total Mentions	48.9K Total Engagement	1.4M Total Reach

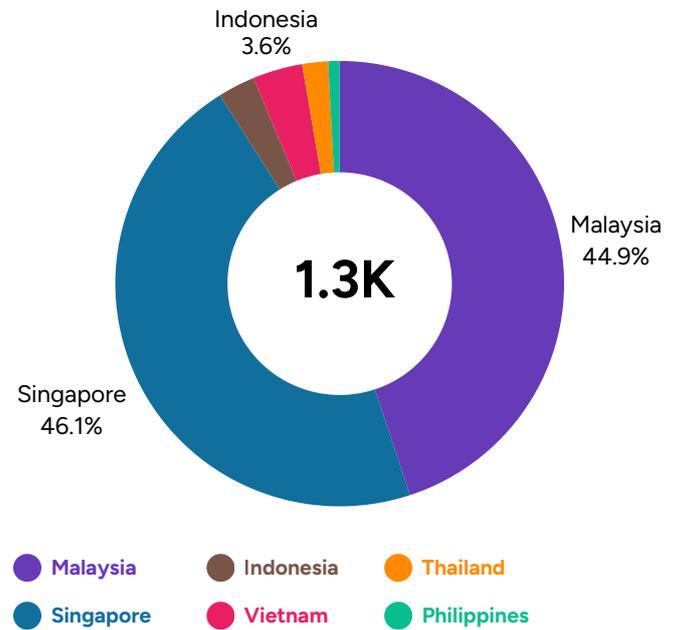


## Market Dominance

### Malaysia and Singapore lead conversations

The emerging nature of the TNE market is reflected in the distribution of discourse across destination markets. UK TNE offerings based in Malaysia and Singapore account for the vast majority of regional discourse, **accounting for over 90% of all UK TNE related conversations in Southeast Asia**. This concentration reflects higher awareness and familiarity, with student discussions clustering around these established provision hubs.

Social conversation volume broken down by destination markets

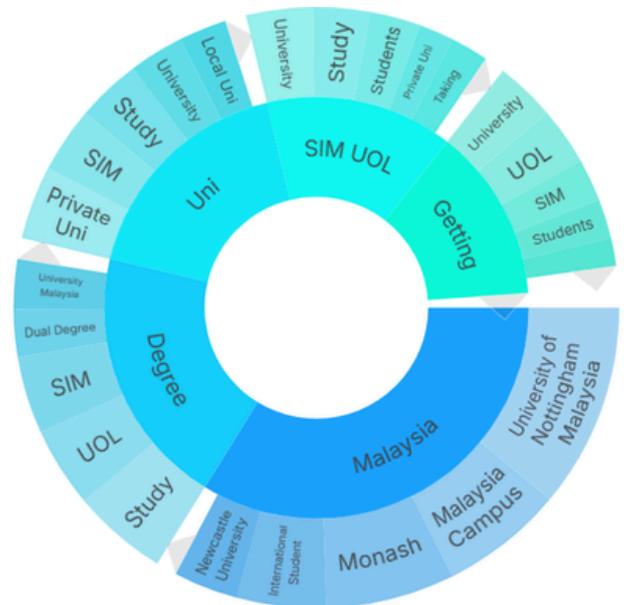


As reflected in the topic wheel, this **concentration is driven by institution-level dominance, particularly in Malaysia, where discussions largely centre on Nottingham Malaysia**. Its scale and brand position it as a key reference point, competing with leading local institutions such as University of Malaya and other prominent TNEs like Monash Malaysia. With such prestigious TNEs, interest in Malaysia extends beyond domestic students, with markets such as Vietnam drawn by comparable living costs and access to a UK degree.

Singapore follows as a secondary focal point, with **conversations shaped primarily by the SIM–University of London (UOL) partnership and debates about the strength of the UOL brand**.

**Key Insight:** UK TNE visibility in Southeast Asia is currently concentrated around a small number of anchor institutions rather than broad market awareness, with Nottingham Malaysia and SIM–UOL acting as focal points that concentrate student attention and shape regional consideration of UK TNE Institutions.

Topic wheel associated with social conversations





## Sentiment Analysis

### Sentiment analysis reveals a mix of optimism and skepticism

As an emerging market, sentiment towards UK TNE Institutions in Southeast Asia remains **balanced**. Students and key decision-makers, including parents, approach TNEs with a mix of **optimism and skepticism**, reflecting an active phase of evaluation. Prospective students focus on understanding the offering and conducting **cost-benefit assessments**, while current students contribute mixed experiences, resulting in neither strongly positive nor negative sentiment dominating.

**Neutral sentiment dominates (79%)**, driven by prospective students seeking information, validating assumptions, and assessing fit. Positive and negative sentiment are evenly split (10–11% each), underscoring cautious **optimism alongside skepticism**. Negative conversation was driven by skepticism around **quality, degree prestige versus onshore study**, and **post-study outcomes**, particularly in competitive markets such as Singapore. Positive discourse was driven by **affordability, accessibility, global exposure**, and **lower entry barriers**, positioning UK TNE Institutions as a **credible middle-ground or transitional option**. This balance results in a near-neutral net sentiment score of 0.09, indicating **attraction tempered by credibility scrutiny**.

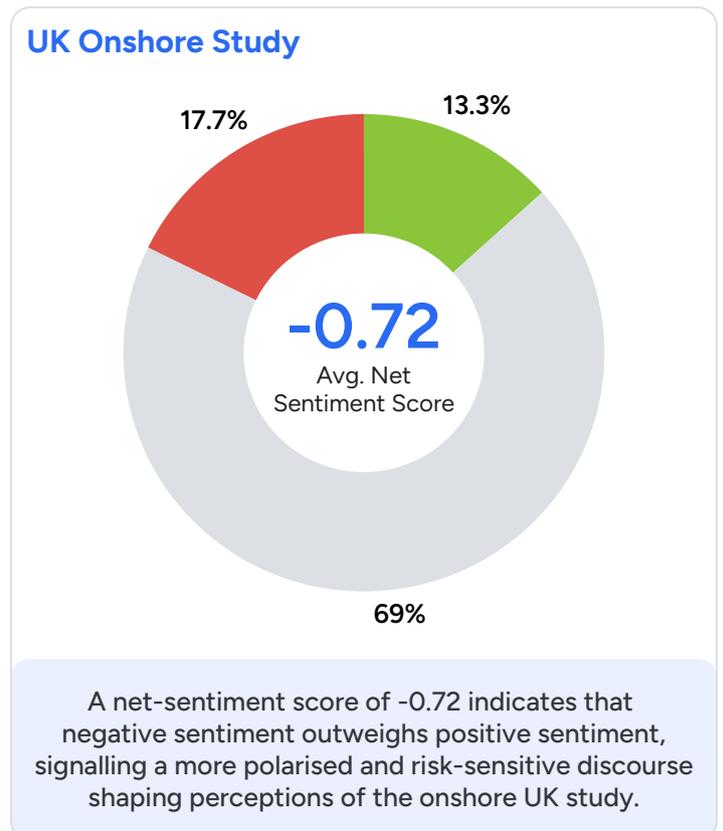
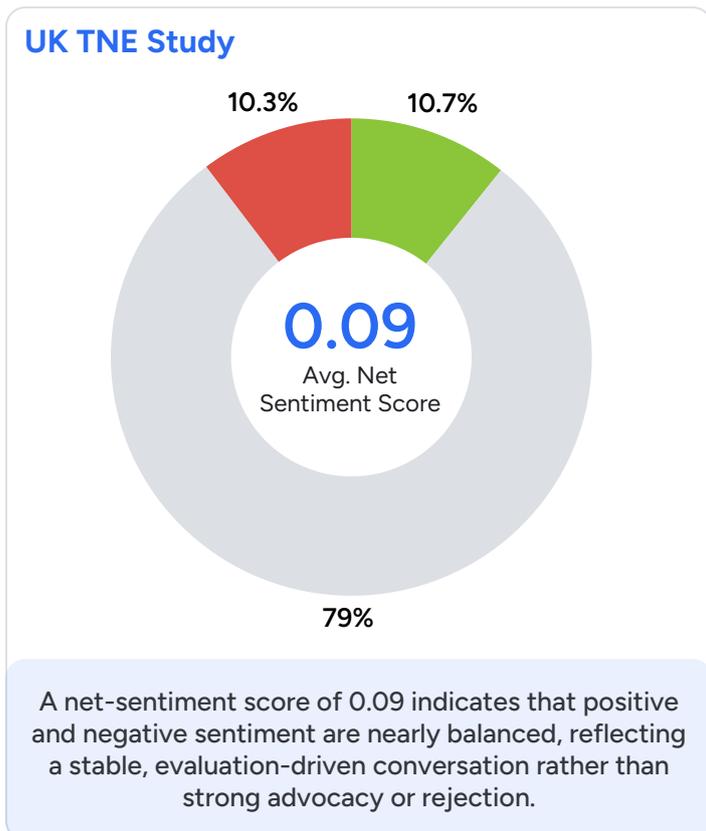
In comparison, sentiment towards onshore UK study was more **polarised and skewed negatively**. While positive sentiment (13.3%) reflects the UK's legacy institutions, rankings, and city appeal, negative sentiment is higher (17.3%), driven by **high living costs, uncertain job prospects**, and **questions surrounding education ROI**.

Overall, while onshore UK study retains aspirational appeal, **economic and structural uncertainties** are actively pushing students to reassess feasibility. This dynamic is creating a **relative advantage for UK TNE Institutions**, which are increasingly viewed as a **more affordable and accessible alternative**, especially at an undergraduate level.

### Comparative Analysis:

#### Sentiment in Online Social Coverage (UK Onshore vs UK TNE Study)

● Positive ● Neutral ● Negative





## Difference in emotions reveal relative advantages of UK TNE Institutions over onshore study

The emotional landscape of SEA student conversations further highlights not just trade-offs, but the behavioural tension underlying decisions between UK TNE Institutions and onshore UK study.

Discussions around UK TNE Institutions are characterised by **attraction (joy)** coupled with **credibility friction (anger)** as dominant emotions, with joy attributed to the availability of **affordable and accessible pathway to a UK degree**. Anger emerged from **decision friction** with students recognising the appeal of TNEs but **struggling to assess their true credibility, recognition, and long-term value**. In high-stakes decisions such as education, information gaps and ambiguity often translate into frustration, particularly when students feel unable to confidently validate whether a TNE delivers outcomes comparable to other modes of education.

In contrast, **conversations around onshore UK study are emotionally "heavier", dominated by sadness (24%) and fear (22%) besides joy (30%)**. These emotions stem from perceived **loss of feasibility in an increasingly unstable socio-economic climate of the UK**. Rising costs, uncertain post-study pathways, and weakened ROI are leading students to feel constrained despite strong aspirational pull.

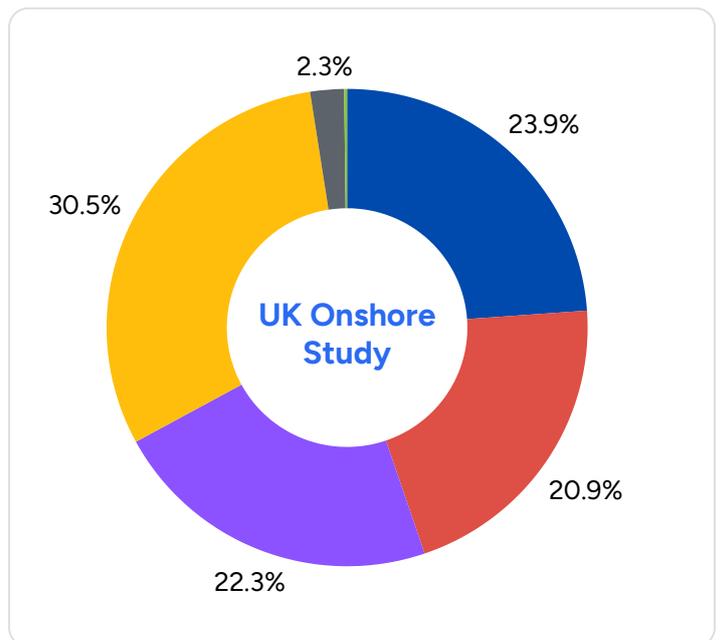
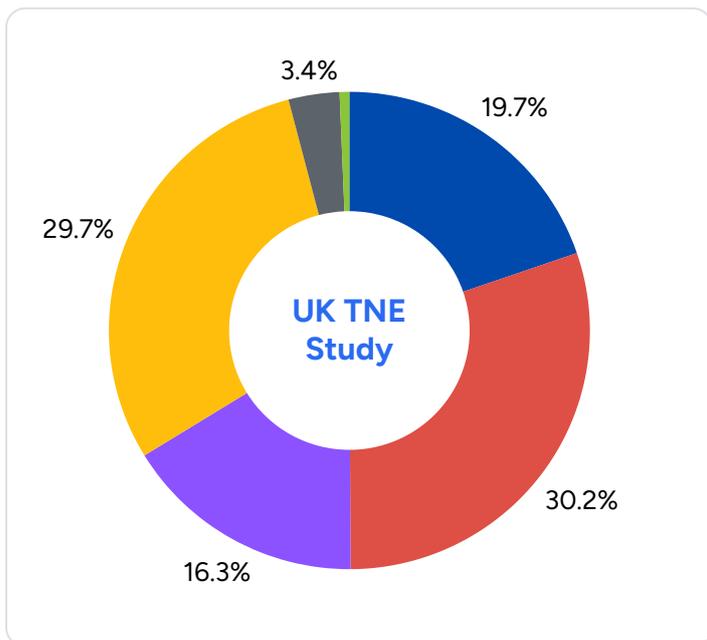
### How emotions are categorised:

Emotions are identified using AI-based natural language processing that analyses tone, context, and linguistic cues within each mention. Each post is assigned a dominant emotional category (e.g., joy, fear, anger) based on the strongest expressed sentiment, allowing us to quantify the prevailing emotional drivers shaping student perceptions.

### Comparative Analysis:

#### Emotional Volume in Online Social Coverage (UK Onshore vs UK TNE Study)

● Anger ● Disgust ● Fear ● Joy ● Sadness ● Surprise



**Key Insight:** Rising economic and outcome-related concerns are pushing students away from onshore UK study, while relative affordability and accessibility are pulling them towards UK TNE Institutions. This shift presents a clear opportunity for UK TNE Institutions to convert cautious evaluation into consideration, by eliminating decision friction and clearly addressing concerns around quality, prestige, and career outcomes.



# Qualitative Analysis

Key Insights from online conversations

## Competitive Landscape

### Students undertake rigorous evaluation of UK TNE Institutions against alternatives

While UK TNE Institutions are **generally perceived more favourably than onshore study in the UK**, this is largely driven by **concerns around growing instability in the global education and economic environment**, which has **made onshore study feel riskier**. However, this relative advantage does not automatically translate into a clear preference for TNE pathways.

For students in Southeast Asia, where **education represents a significant financial investment**, TNE decisions are shaped by rigorous cost–benefit evaluation, with **students weighing fees, living costs, outcomes, and long-term return on investment across a multitude of study options available to them**. Crucially, to understand how students truly perceive UK TNE Institutions, they must be viewed within the competitive frame students apply.

**Key Insight: UK TNE Institutions** are evaluated alongside onshore UK study, strong domestic universities, and TNEs from other exporters such as Australia. It is this comparative landscape, rather than sentiment in isolation that ultimately shapes consideration and choice.

#### UK TNE Providers

##### Local Institutes

“So if you've a choice, pick the local options over the local foreign u”

##### UK Onshore Study

“Actually I'm curious on both nottingham and monash because, why not go abroad and do at main campus instead of locally right?”

##### Other TNE Providers

“I recommend other universities like Sunway, Help, Taylors, or Monash (Malaysian campuses), they're also good”



## Thematic Analysis

### Students evaluate their choice on the quality outcome spectrum

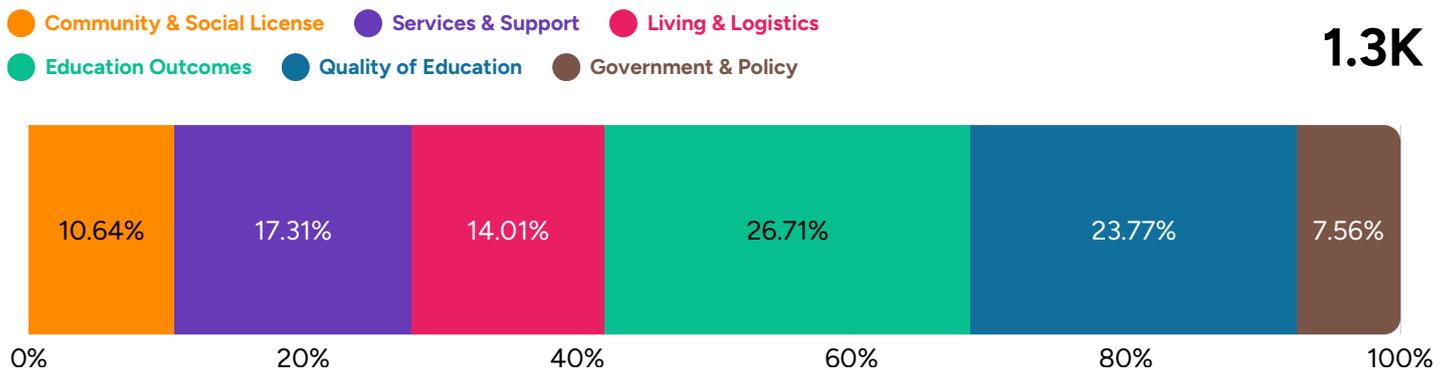
When evaluating TNEs within a competitive landscape, **students prioritise two core decision drivers i.e., career outcomes (~27%) and quality of education (~24%),** which together account for over half of all student conversations.

**Prospective and incoming students approach these decisions cautiously, actively turning to Reddit communities to seek advice and reassurance. This fuels a substantial volume of peer-led support conversations (~17%),** where current students and alumni share lived experiences, opinions, and outcomes related to education quality and career prospects, directly shaping decision-making.

Within these exchanges, the positioning of UK TNE Institutions becomes clear. They are widely viewed as more affordable and accessible than onshore UK study, yet simultaneously associated with greater uncertainty around prestige, exposure, and long-term outcomes.

**This tension defines UK TNE Institutions’ role in the regional landscape as a middle-ground option that balances cost, accessibility, and brand recognition, but remains challenged by perceptions of status and long-term advantage.**

Social conversation volume broken down themes



### Students lingo reveals what they care about

This evaluative mindset is also evident in the language students use. Words such as **“work,” “career,” “future,” “pay,” “job” and “opportunities”** surface frequently, **highlighting a focus on career outcomes and return on investment (ROI).** For many students, a TNE education is seen as worthwhile only if it delivers clear career returns that justify the higher fees of private TNE institutions against local universities with stronger domestic prestige and career networks.

Similarly, frequent use of terms like **“global,” “good,” “quality,” “teaching,” “learning” and “options”** points to sustained scrutiny of educational quality, with students questioning whether teaching standards, degree credibility, and prestige match onshore education, and whether a TNE degree delivers equivalent academic and signalling value.





## Market Deep Dive

### Student evaluation is determined by market maturity

The following in-country sections focus on markets with the highest discussion volume and most established UK TNE presence within the dataset. Markets with lower but emerging discussion volumes, including the Philippines, are reflected within the regional analysis but are not presented as standalone deep dives.

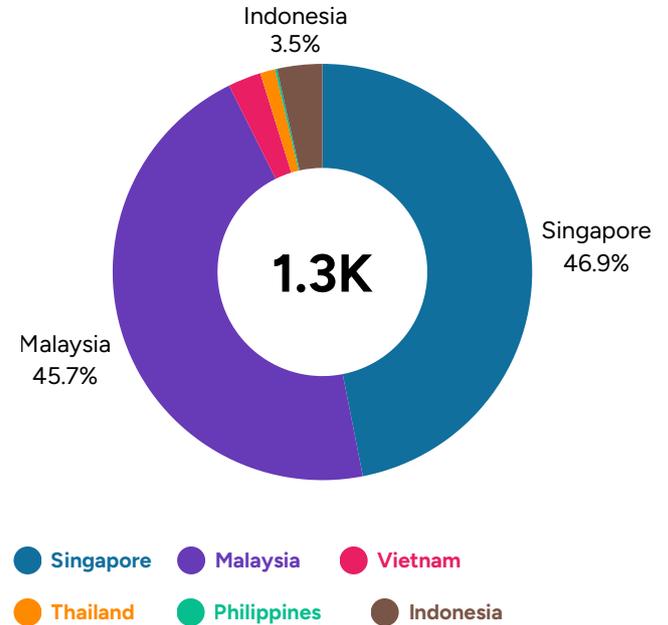
With Malaysia and Singapore emerging as the primary UK TNE host destinations in Southeast Asia, it is unsurprising that students based in these two markets drive the over 90% of conversation volume. This reflects not only the strong acceptance and familiarity of UK TNE Institutions in Malaysia and Singapore, but also the highly localised nature of TNE interest in the region, where engagement remains largely domestic.

That said, **Malaysia and Singapore also function as regional TNE hubs, attracting some intra-regional mobility.** In Malaysia, discussions are shaped by both domestic students and international voices from India, Bangladesh, and Pakistan, while in Singapore, conversations include international students from markets such as India and China, who form a meaningful share of UK TNE interest in the country.

In comparison, **Indonesia and Vietnam see domestic interest, while Thailand and the Philippines are still nascent.** This highlights differing stages of market maturity, with regional mobility concentrated around established TNE hubs rather than evenly distributed across Southeast Asia.

**Key Insight:** While UK TNE Institutions are emerging across Southeast Asia, markets sit at different maturity stages and require distinct strategies. Malaysia and Singapore need sharper differentiation and outcome-led positioning, Indonesia and Vietnam require awareness-building and value clarification, while Thailand and the Philippines call for early-stage, trust-building communication to seed future consideration.

Social conversation volume broken down by students source countries



### With differing market maturity, understanding market nuances is critical

With differing levels of market maturity, student conversations vary across Southeast Asia. **In Malaysia and Singapore, students engage from a more informed position, with clear push-pull factors** and strong current student voices, leading to greater consensus around affordability, recognition, and prestige and outcomes.

In contrast, **Vietnam and Indonesia reflect an earlier-stage mindset, with lower-volume, and students speaking from a position of exploration rather than evaluation.**

As market maturity plays a defining role in shaping student confidence and discourse, it is critical for UK TNE Institutions and government stakeholders to account for these differences and develop tailored, market-specific strategies, as a one-size-fits-all strategy is unlikely to deliver measurable impact.



## Malaysia (Domestic Student Voices)

### Students View UK TNE study as a Lower-Risk Alternative to On-Shore UK Study

**UK TNE Institutions** are seen as a middle ground solution among students offering international pedagogy, mobility, and prestige without financial risk and emotional challenges associated with UK onshore study. This positioning is especially strong among cost-conscious or family-oriented students.



Nottingham is a semi-target in UK finance, and ure **paying a fraction of what it would cost to study the entire degree in the UK**. Comparable semi-target unis like KCL,Edinburgh is **way more expensive for what is essentially the same prestige level**. So I think ROI wise, q worth it.



Most of my family, went to study abroad so they are like oh I really should go this and there so on, but also my brother who studied in the states said **it's just better to stay local, abroad is kinda too far from family** and just choose a good uni like nottingham or UM.



I would say **UNM/Monash Malaysia have always been some of the best schools in the country that give you that taste of international exposure/education** (albeit not the full "immersive foreign culture," but you do get a solid taste of it) at a relatively affordable price.



Not worth it then unless you can self fund without loan or debt (**even then go for a better university**)....**Consider a Malaysian private university which has a twinning program if you really wish to complete the degree in the UK, or opt for local programs that award a UK degree.**

### Uncertain Post-Study Prospects Push Students Toward UK TNE as a Staged Mobility Path

Concerns around job security and post-study pathways in the UK are discouraging students from committing to onshore undergraduate study. Instead, students are drawn to UK TNE Institutions as a more predictable entry point, completing their undergraduate education locally before reassessing onshore UK study at the master's level.



lot of them ended up **not being able to land a job abroad after graduation** even with the 2 year visa to find jobs and many, if not **most of them ended up returning to KL**...So that's why I chose to stay back in Malaysia to study, turns out it was the right choice.



Yes its a horrible idea. **If you forced to return to Malaysia after graduating it's a real gg**. ...Now unless its oxbridge, that's a different story. Do a masters in the uk once you're more stable if you really want to.



Why not just stay in malaysia? **Roi is pretty bad, job security afterwards is also a question mark**. Speaking from experience based on my relatives, all came back because couldnt get one to sponsor their visas. It is a tough market esp for international students.



It's **not worth it. Employment opportunities in the UK is limited with just a BSc**. You'd be better off spending for a Masters.



## Malaysia (Domestic Student Voices)

### Students Compare UK TNE Institutions Against Strong Australian Alternatives in Malaysia

While Malaysia offers a wide range of UK TNE options, the presence of equally prestigious Australian branch campuses introduces clear friction in the decision-making process. Institutions such as Monash are widely perceived as leading TNE providers, placing UK universities like Nottingham in direct competition.



Hello, I'm f19 international student, currently taking a look at my university options. For the most part I'd been **leaning towards Taylor's university but now also considering University of Nottingham Malaysia**...which one is considered **cheaper**?



**which unis are the best for finance jobs such as corporate finance, investment banking, private equity all that?** the unis im looking at right now are **University of Nottingham (Malaysian campus) and Sunway College (Victoria Uni programme)**.



for second preference, instead of **Sunway and Nottingham, actually i would recommend \*Monash\*'s Bachelor of Business and Commerce**...As **\*Monash is a QS Top 36 uni\*** with AACSB recognition, which **\*gives u higher employability recognition** upon ur degree graduation\*!

### Students Seek Assurance That UK TNE Degrees Match the Home Campus

Students validate whether a UK TNE degree in Malaysia is truly identical to the UK home campus degree. Recognition parity (certificate, transcript, logo) becomes a psychological anchor to offset fears of being seen as "lesser" because the study location is Malaysia.



Is the Lancaster dual degree **a real advantage in recruiting** or just a marketing trick with zero extra value **once recruiters know you studied in Malaysia**?



... but graduating from malaysia or their home campus is the same and the **degree would be recognised and given equal recognition**



Nottingham's cert and transcript will be the same as the UK one (logo, sign, etc). In a sense, **they don't differentiate you by campus**. So **it's the same, whether you study here or UK**.



Don't go to the branch universities, there are **complications with accreditations and employment**. You should **consider Taylor's university or universiti Malaya**. Both are recognised globally and in world rankings, you can do your masters in the UK still. If you go to the university of reading, make sure you transfer to the UK branch in your third year.



## Malaysia (Top Sending Country Voices)

### International Students View UK TNE in Malaysia as More Foreigner-Friendly Than Public Universities

For international students considering Malaysia, UK TNE Institutions and private universities are perceived as more foreigner-friendly than local public institutions, particularly in terms of language of instruction, perceived fairness, and post-graduation pathways. This creates a structural push away from local public universities and gives UK TNE Institutions a competitive and cultural advantage.

 You are probably **better off with one of the private universities in Malaysia** vs public as **you can't speak the Malay language.**

 It's not just **racism from students** but it'll also be hard for you to do group assignments, finding internships is also a big challenge. **Private uni at least give internship opportunities for international students.**

 **Private universities do send you to public hospitals to train, but some of them have their own hospitals, and their patients are more likely to be able to speak in English.** Additionally, all public universities require Malay language competency to be able to enroll.

### International Students Favour UK TNE in Malaysia for the Global Mobility It Preserves

The global recognition of UK TNE Institutions, relative to local Malaysian universities, acts as a key pull factor for international students considering Malaysia. Studying in Malaysia but holding a UK degree is seen as keeping doors open even if Malaysia itself is perceived as a dead end for foreigners.

 if you're thinking Malaysia you can forget it. **The chances of you getting into housemanship here as a foreigner are close to 0.** If you're planning on other countries then also forget it cause **local Malaysian unis are not accredited by a majority of the countries.**

 Since you are an international student, I would advise taking from a **well known international university.** This helps to pave a Plan B and C in case you can't find a job or don't want to work in Malaysia. **Monash/Nottingham Malaysia.**

 Since you're a foreigner **there's a higher chance of you leaving malaysia upon completion of your course** so make sure whatever institution you decide to go with has **good recognition abroad and in your home country.**

 **Since you're not Malaysian, I don't think you'll be able to do housemanship after graduation** since they only allow it for those who have the PR or IC. **Newcastle university is great because you get to do internship in the UK straight away** after graduation as long as you apply for the UKFPO program



## Singapore (Domestic Student Voices)

### Singapore Students Differentiate Between Elite UK Universities and TNE Delivery

Singapore students strongly distinguish between elite UK institutions and UK degrees delivered via TNEs. A UK awarding body alone does not confer prestige; where and how the degree is obtained matters. SIM-UOL, in particular, is widely perceived as structurally and reputationally separate from elite UK universities, and is instead viewed as equivalent to studying at a local private institution rather than in London.



Lmao, the **quality of education** u will get from a UOL uni in person is muchhh better than SIM.



**SIM-UOL is not UOL, and nothing about SiM-UOL was considered to determine UOL's ranking.** For example, can you name impactful academic research coming from SIM-UOL?



In the context of Singapore, a **UOL degree = SIM degree.**

### Singapore Students Prioritise Local Universities Over UK TNE for Employment Outcomes

In Singapore, a well-understood hierarchy in graduate outcomes positions local universities above UK TNE Institutions, despite the latter's global brand recognition. Local universities are seen as delivering superior career outcomes, while UK TNE Institutions are categorised as private degrees with lower hiring priority. This structural inferiority discourages local students, who recognise that global branding does not translate into equivalent local employment outcomes.



You basically answered your question. **Teaching quality, curriculum rigour and alumni network** plays an important role why **local U holds more weight than private U.**



This is because **local university graduates are generally more capable than private university graduates...**They have **curriculum rigor** as it has to be approved by MOE. Students are also more capable individual as the admission criteria and resources available to local universities student is higher.



**UOL ain't prestigious compared to local uni, I'm from SIM-UOL, they brand it as a distant learning programme...**So **if you can get into a course of your choice in local uni, you wouldn't give it up to go SIM-UOL basically.**



If you are in SIM or kaplan studying for a degree under those English public University, **hiring managers and general public consider them as private uni in Singapore's context.... Which makes it harder to get a job, and it will be a uphill better fighting against local uni grads from the local 6.**



## Singapore (Domestic Student Voices)

### Lower Entry Thresholds Position UK TNE as an Accessible Alternative

Lower barriers to entry increase the appeal of TNEs, attracting students who are unable to secure places in local or elite overseas universities. This dynamic positions TNEs as an alternative pathway for students prioritising access over selectivity.

 Im a 2024 O level student so i got my results, eae, jae, jae appeal yada yada all that lah basically i **didnt get the course that i want...**So im just looking for advise... from anyone...who've been to kaplan for diploma/degree, or any other private institution to complete diploma/degree

 Heyyo. SIM UOL grad here 2018. **No prestige honestly. I screwed my A levels (GP: S) so I couldn't get into a good course in local uni.** Next best alternative is a private uni which is somewhat recognised in the job sector in SG..... Honestly **if you can't get into a local uni, this is the next best alternative, in my time.**

 Because **getting into UK unis like Imperial, UCL, Kings is extremely hard**, requires straight As, and competitive while **usually people that didnt do well in 'A' lvls go to SIM**

 cause the UK UOL that ppl refer to is in fact UCL, KCL, ICL, LSE which are way more prestigious internationally and harder to get in. Usually top A level students go there to study. **SIM UOL is just pay to win and usually ppl who cannot get into uni go there.**

### Information Gaps Weaken Confidence in UK TNE

Limited and unclear information on UK TNE Institutions creates friction for Singaporeans. Confusion around degree structures (e.g. UOL's constituent model) and low awareness of lesser-known institutions like Stirling increase uncertainty and slow decision-making.

 **Lack of info is a red flag.** As a final mile of your education , **a school name that is recognisable in general goes a long way in your job search.**

 I am thinking of applying for marketing at University of Stirling or University of Birmingham at SIM GE. **But there isn't any information on the University of Stirling.** Mostly University of Birmingham

 **"UoL is not a true university"**...you're not wrong, but you're not entirely correct either, and I don't fault you – **the structure of UoL is quite complex and hard to grasp for many.**

 **What is the actual difference between obtaining a University of London (UOL) degree** through SIM versus **studying directly at UOL in the UK**, given that the **degree awarded is the same?**



## Singapore (Top Sending Country Voices)

### Students Value UK TNE for the International Pathways It Enables

Global recognition and international career pathways pull international students towards UK TNE Institutions in Singapore, positioning these programmes as gateways to opportunities beyond the local market.

 However **UOL is well known in other countries** and your cert have LSE on it so **overseas employers will put u on the same level as a uol grad from a LSE** and u have btr Competitiveness compared to SUSS degree.

 I'm an international student majoring in accounting at CSUSB...Why I'm Considering UoB at SIM (Singapore), **Global reputation and rankings seem stronger for UoB...**

 i've received offer letters from uol (through sim ge) and james cook university (jcu) singapore for business management. i'm an indian student finishing up my ib diploma...**both programs seem solid, but i know they're very different when it comes to global recognition... i'm aiming for a degree that gives me strong international value...**

### Limited Post-Study Work Options in Singapore for TNE Graduates Reduce the Appeal of UK TNE

Restricted post-study work and residency pathways in Singapore act as a key friction for international students, with TNE graduates perceived to be at a disadvantage relative to local university graduates, driving peer-led discouragement online.

 Sim? Dont waste your time, **especially as an intl student**

 If you think it will be any easier getting a job in sg, especially with a SIM degree, please think again. **We have no shortage of local fresh graduates.**

 i think its more worth it if u **use the money and spend it on other more reputable universities overseas like australia... intl student + private degree is really the worse combo in terms of job prospects.** also wouldn't help in your pr/citizenship application since u will be competing with foreigners that graduate from nus etc

 Yes. **Very hard as an international student to get a job here with a private degree...**and this is how employers are probably prioritising their selection process...**Local from Big Three (NUS/SMU/NTU) > Foreigner from Big Three = Local from SUSS/SUTD/SIT > Foreigner from SUSS/SUTD/SIT = Local with Private Degree > Foreigner with Private Degree**



## Indonesia (Domestic Student Voices)

### Concerns at Home and Caution Abroad Drive Indonesians Toward UK TNE in Other Countries

Indonesian students are increasingly considering TNE options in Malaysia and Singapore, shaped by concerns around local quality and limited exposure. At the same time, uncertainty about outcomes from studying fully overseas creates an opportunity for well-positioned in-country TNE provision.

 ...my dream is to leave Indonesia and develop in an international environment 😊...I'm not too interested in studying in Indonesia because I feel there are other opportunities such as Ausbildung which are more promising for me and continuing higher education in Germany.

 Hello, I'm an international student from Indonesia. I'm planning to study abroad to Malaysia next year, **taking actuarial science**. I ended up having 2 choices for universities, they are APU and Heriot Watt. I'm still reconsidering on which one to take.

 Bachelor's **degrees in economics in Indonesia seem like catch-all courses**, and the knowledge is likely to be useless.

 At MDIS, it's the same, depending on the department and partner university. **I personally studied a Bachelor's degree in Media & Communication at MDIS**, a partner university of the University of Sunderland.

 When considering job prospects, there's the **added difficulty of finding work abroad**, and **you have to consider the country's current policy of being open to immigrants**. My personal experience was that **when I studied in the UK, I couldn't get a job there because of the strong anti-immigrant sentiment**

### Prestige and Employer Recognition Shape Indonesian Evaluation of UK TNE

Institutional ranking, prestige, and recognisability are central considerations for Indonesian students, many of whom turn to community platforms such as Reddit to validate reputation, employer acceptance, and the relative value of different offerings, including TNE. As the model is still emerging in Indonesia, students remain in the process of understanding where these qualifications sit within the broader higher education landscape.

 **Does prestige/QS ranking of a university matter to employers?** Say I have completed many actuarial exams but graduated from a not-so-highly-ranked university, which has a ranking below 250; **would employers care about where I graduate from?**

 Additionally, are foreign, say UK, **employers serious about the university at which I graduate?** Does institute matter that much when I have completed many exams?

 I heard that Heriot Watt is pretty difficult and challenging, I'm afraid that I won't be able to survive there due to my lack of competence. Is it true? For overall, **which one do people prefer and recognize the most?**



## Indonesia (Domestic Student Voices)

### Funding Pathways Are Central to Indonesian Interest in UK TNE

Scholarship access is a defining priority for Indonesian students. Announcements of new TNE partnerships on social platforms often generate discussion around funding availability, reflecting the centrality of financial feasibility in decision-making.

However, in the Indonesian context, institutional alignment with major funding bodies, particularly the Indonesian Endowment Fund for Education (LPDP), is likely to be more influential than marginal differences in tuition pricing. As the country's largest government scholarship provider, LPDP offers full-ride funding packages, meaning eligibility and institutional recognition can materially shape demand.

 I hope the **scholarship** is not complicated yo rek. Arek arek East Java Ki smart smart just need a chance to support Karo ae. Cheers~ ✨

 Alhamdulillah, hopefully the LPDP **scholarships** for KCL Singhasari students will be realized soon. Keep up the good work, friends🔥

 May Allah make everything easy for you regarding the **LPDP scholarship** and the collaboration with KCL. Many young people are looking forward to this opportunity, O Allah 🙏

 "Smart East Java through world class campus **scholarships**🌟🌟

 Hi, **how to get a 100% scholarship?**

 Thank you East Java Provincial Government for opening **scholarship opportunities** for all of us... hopefully many young people from East Java can get through KCL... 👍

### Indonesians Welcome the Expansion of UK-Linked Opportunities

Overall, TNE models appear to be well received by Indonesian audiences, reflected in the positive and hopeful tone seen in responses to partnership announcements. For many, these initiatives signal progress and the promise of improved learning experiences, reinforcing favourable perceptions of the collaborations.

 So cool! **Blended learning directly from KCL lecturers is sure to be an amazing learning experience.** Hopefully, it continues.

 "Excellent, Madam Governor! The **presence of KCL in East Java is a major leap forward for our education system.** Hopefully, it will be the beginning of the birth of world-class human resources from East Java."

 The spirit towards East Java progressing and achieving🙌🙌🙌



## Vietnam (Domestic Student Voices)

### Cost Familiarity Makes Malaysia an Attractive Base for UK TNE

Vietnamese students consistently frame Malaysia as a cost-comparable extension of Vietnam, rather than a high-risk overseas destination. UK TNE Institutions in Malaysia benefit from this perception, as they offer international exposure without the sharp cost escalation associated with Europe or the US.

 The cost of living in Malaysia is quite reasonable; even in Kuala Lumpur, **the cost of living is only about 20% higher than in Ho Chi Minh City**. If you live in the suburbs, it's even cheaper, around 10-18 million VND per month.

 the cost of living, food, and transportation in Malaysia, **if you live in Kuala Lumpur, is almost the same as in Ho Chi Minh City, but the security and transportation are better.**

 Overall, the **cost of living is comparable to Vietnam. It's quite comfortable compared to European countries, the US, Korea, Japan, etc.**

### Vietnamese Students View UK TNE as a Stepping Stone to Better Opportunities

Vietnamese students explicitly evaluate UK TNE Institutions through a quality-and-employability lens, often comparing them among international destinations. In this, often TNEs are seen as a transitional option, providing pathways to something better after.

 You should consider Singapore or other major countries; I honestly recommend it, it will be worth the money you spend on studying abroad. **Malaysia is cheap and close, but there's nothing else to offer.** If you're going to study there, it's still okay...

 Regarding Nottingham, Malaysia... there aren't many reviews. **If you plan to study in the UK later, it's a decent option...I recommend other universities like Sunway, Help, Taylors, or Monash (Malaysian campuses), they're also good.**

 If you're going abroad to study, study engineering, science, or go to a first-world country to **get a green card.** Why waste your money and time studying some nonsense in Malaysia?



## Vietnam (Domestic Student Voices)

### Unclear Affiliations Undermine Trust in UK-Linked Programmes

While UK-linked programmes carry brand appeal, quality skepticism is high, especially for joint or affiliated programmes. Students and parents actively question whether “UK-linked” actually translates into rigorous teaching and outcomes. UK TNE Institutions gain trust when their academic linkage to the UK is explicit and verifiable (grading sent to the UK, part of a UK network). Vague or poorly explained affiliations can reduce confidence.



**sounds iffy. If you wanna do private uni (not the gov ones) then** there are some reputable ones: FPT, VinUni, RMIT, Fulbright, BUV, etc who have completed such joint programs? If so, please share your information and experiences.



I think the **departments affiliated with British universities are pretty good**; they're part of a British university network. The grading is also sent to the UK, so it should be okay.



I think you shouldn't enroll in those joint programs; **I've heard the quality is quite poor**. It's **better to go to international schools like RMIT**.



BUV focuses on economics, offering three different study programs with varying tuition fees. **The program in partnership with a UK university seems to have quite high tuition fees**, but the **degree and program quality also demand high-quality students**

# Strategic Implications

Student conversations across Southeast Asia show that UK TNE Institutions sit in a position of high potential but incomplete conviction, recognised as viable, yet not fully trusted. Students recognise the model as a financially safer and more accessible route to international education compared with on-shore study in the UK.

However, decisions are made within an intensely comparative environment where career outcomes, degree credibility, and recognisability ultimately outweigh brand alone. As a result, awareness exists, interest is present, but conversion depends on reducing uncertainty and proving value.

Before moving into specific recommendations, it is important to recognise where markets sit along the maturity curve, as this will determine how engagement should be prioritised and deployed.

- **Malaysia and Singapore:** Shift from building awareness to differentiation by competing on outcomes, prestige validation, and comparative advantage against alternatives.
- **Indonesia and Vietnam:** Prioritise strengthening institutional recognition and structural alignment. In Indonesia in particular, deepen engagement with major funding bodies such as the Indonesian Endowment Fund for Education (LPDP).
- **Thailand and Philippines:** Focus on seeding trust early through visibility, partnerships, and foundational storytelling.

As universities and government stakeholders look to implement the strategies outlined next, success will depend on keeping these differences in market maturity front of mind.

## For UK Universities and local UK TNE Providers:

### Move from brand to evidence

A UK name alone no longer guarantees confidence. Students seek proof. UK moderation, identical awards, shared faculty, mobility rights, and visible alumni outcomes could help build confidence.

### Lead with outcomes and funding

Students heavily weigh return on investment as well as affordability. Institutions that foreground employability, recognition, and progression opportunities and scholarship availability will align more closely with how students prioritise choices.

## For UK Government Stakeholders:

### Build national clarity around what UK TNE represents.

Students often struggle to understand how TNE compares with on-shore study. Government can reinforce this through consistent, cross-market messaging on quality assurance and comparability.

### Enable scholarship and financing narratives

Affordability and funding remains one of the clearest triggers of positive sentiment and intent. Targeted funding attached to new or priority partnerships can attract high-achieving students, raise the academic profile of TNE cohorts, and signal prestige

### Reduce ambiguity at the decision point

Directly addressing student concerns is critical to closing persistent information gaps. Complex degree structures, unclear affiliations, and unfamiliar institutional names create hesitation. Simplified explanations, comparison tools, and transparent FAQs can help shorten evaluation cycles.

### Activate peer advocacy

Prospective students rely heavily on current students and alumni. Universities should therefore embed authentic student experience into recruitment narratives rather than relying predominantly on institutional voice

### Support outcome signalling

Government can strengthen trust in UK TNE by promoting system-wide evidence of graduate outcomes, employer recognition, and international mobility, while deepening partnerships with industry and professional bodies to reinforce labour-market credibility.

### Increase visibility in emerging markets

In countries such as Indonesia and Vietnam. Even modest awareness interventions backed by the government could produce outsized gains given high engagement intensity



---

To explore student sentiment insights and market intelligence:

[Visit Voyage Website](#)

[Get in Touch](#)

---



---

To discuss institutional TNE strategy and staff development support:

[Visit TNE Website](#)

[Get in touch](#)

---

# Appendix



# Knowledge Architecture

---

## Themes



### Government Policy and Engagement

This theme explores how government policies, such as immigration and visa processes, financial support, and quality-of-life measures, affect international students.



### Community and Social License

The Community and Social License theme focuses on fostering positive relationships between international students, universities, and the wider community.



### Services and Support

This theme covers the accessibility and effectiveness of academic, career, mental health, and cultural adjustment services.



### Education Outcomes

This theme focuses on the relevance and quality of education provided to international students.



### Quality of Educational Experience

This theme emphasises the importance of teaching quality, cultural sensitivity, and academic support.



### Living and Logistics

Involving aspects like housing, transportation, healthcare, and cost of living. International students' satisfaction with these factors directly impacts their ability to focus on studies and integrate into Australia



# Knowledge Architecture

---

## Metrics



### Mention Volume

Mention volume is a metric at the forefront of social listening research. It is the volume of posts, comments, articles, etc. and is often used as a measure of awareness, buzz, and/or public interest.



### Engagements per Mention

Measures the average level of interaction generated by each individual mention. It is calculated by dividing the total number of engagements (such as reposts, comments, replies, and likes) by the total number of mentions.



### Net Sentiment Score

Measures the ratio of positive to negative conversation on a scale of -5 to +5. This is used as a general measure of sentiment surrounding a theme, topic, or brand, and is best read directionally (benchmarked).



### Reach

Reach is an estimate of the number of unique individuals that have seen a given mention.