

## Education New Zealand Aide memoire

**Title:** Update on the Kantar brand health survey for international student preference

**Date:** 10 August 2022 **Priority:** Medium

**Security level:** Unclassified **ENZ ID no:** 2223-037

### Contact for telephone discussion (if required)

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### Purpose

1. To provide a high-level summary of the findings of the 2022 Brand tracker report, including preference for a New Zealand education, commissioned by Education New Zealand Manapou ki te Ao (ENZ). Kantar Research will discuss these results with the international education sector at the New Zealand International Education Conference 2022 on Tuesday 16 August.

### Background

2. The Brand tracker report is an annual survey of more than 4,000 *considerers* surveyed online across 11 countries.
3. Survey respondents were 16-25-year-olds who are interested in studying overseas. In each country, 20% of students were aged 16-17 and 80% were 18-25. In some countries, parents (who must be at least 30 years old) were asked their opinions. The survey was run from 2-21 June 2022.
4. ENZ uses this report in relation to its Statement of Intent impact measure "Prospective international students' preference for a New Zealand education is increased."

### Key findings of the report

5. The key findings are:
  - *Prompted awareness* of New Zealand is at 27% down from 29% from 2021. *Consideration* and *country preference* are unchanged from the 2021 study.
  - The percentage of international education *considerers* placing New Zealand in their top three preferred destinations is steady at 13%.
  - *Being a safe place to live and study* has gone from 10<sup>th</sup> in 2021 to being the highest impact brand association. Against our competitors, New Zealand rates highly on this

brand association. To establish a brand association, respondents are asked *From the list below, please tell us which country or countries that you associate with each of the following statements* and to rank each statement in order of impact.

### Student motivations and demand

6. Importantly, students are still considering international study for the same core reasons: to live and travel overseas, to meet new people and to enhance their employability. Fuelled by these traditional motivations, the pandemic has only slightly altered the level of demand for international study.

	2022	2021	2020	2019
I am interested in studying overseas	69%	71%	72%	71%

7. Of the 69% interested in studying overseas, there is less COVID-related delay in students' planning and an increase in studying at home, online, and in a country closer to home.

	2022	2021
I am considering studying overseas <i>but not until the COVID-19 pandemic settles</i>	34%	48%
I am considering studying overseas but <i>I'm also considering studying at home</i>	29%	23%
I am considering studying overseas but <i>I'm now considering studying online</i>	20%	18%
I am considering studying overseas but <i>I'm now considering studying in a closer country</i>	12%	10%

### Country choice drivers

8. The ranking of country choice drivers is unchanged from 2021. The top four drivers are presented below.

	2022	2021	2021 & 2022 Rank
Providing you with the knowledge and applied skill and adaptability that will make you ready for the future of work	51%	53%	1
Providing you with the skills and knowledge to work globally	45%	49%	2
Providing positively challenging experiences for personal growth	43%	46%	3
Having a variety of stimulating learning experiences, inside and outside of the classroom	40%	43%	4

### New Zealand's brand performance

9. New Zealand's brand performance compared to other countries is:

	New Zealand	Canada	Australia	Singapore
Prompted awareness	27%	44%	41%	26%
Consideration	17%	30%	26%	17%
Country preference	8%	15%	12%	6%

### Analysis for New Zealand's brand performance

10. New Zealand and Singapore were closely ranked for the fifth strongest brand in student mobility (noting that the United Kingdom (UK) and the United States of America (US) are consistently ranked first). A decline in prompted awareness is the only change. Consideration and country preference are unchanged from the 2021 study.
11. The reduction in prompted awareness is not unexpected due to the borders being closed and, amongst other things, agents redirecting resources. That consideration and country preference are unchanged is good news in this context.
12. New Zealand's prompted awareness, consideration and country preference are all significantly higher among parents than among prospective students.
13. New Zealand's brand health is, however, becoming more polarised; improving where it is strong in China (Tier 1 cities) and declining where it is weaker in Brazil, India and Colombia.

Partner country	Prompted awareness <sup>1</sup>	Consideration	Country preference
China (Tier 1 cities)	48% (31%)	42% (25%)	17% (11%)
China (Tier 2 cities)	40% (38%)	35% (32%)	18% (14%)
India	21% (33%)	8% (18%)	3% (3%)
Japan	35% (41%)	23% (16%)	7% (6%)
South Korea	15% (15%)	6% (7%)	4% (4%)
Thailand	24% (31%)	18% (24%)	9% (11%)
Brazil	18% (27%)	11% (18%)	2% (4%)
US	30% (26%)	17% (15%)	6% (6%)
Viet Nam	33% (39%)	18% (16%)	8% (7%)
Germany	30% (33%)	15% (20%)	6% (8%)

<sup>1</sup> 2021 result in brackets for comparison.

## Brand associations

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14. The four high impact brand associations for considerers in 2022 are:

- a. Being a safe place to live and study
- b. Focusing on preparing students for the future
- c. Welcoming to new ideas and ways of thinking
- d. Providing the knowledge, applied skills and adaptability to make you ready for the future of work

## Analysis for brand associations

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15. Being a safe place to live and study has gone from 10<sup>th</sup> in 2021 to being the highest impact brand association. Against other countries, New Zealand rates highly on this brand association, and is second only to Canada, ahead of the UK, Australia and the US.
16. On the other attributes New Zealand is ahead of, or matches, Australia, but lags behind other countries and the market average. Thailand, China and Viet Nam have the most positive perceptions of New Zealand on the statements that matter, and Korea, Japan and India the most negative.
17. Perceptions among our *experience/knowledge* target segment remain more positive on these priority brand association statements and that the size of the *experience/knowledge* segment, is unchanged at 27%.

## Recommendations

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Education New Zealand recommends that you:

- a. **Note** that prompted awareness of New Zealand is at 27% down from 29% from 2021, while consideration and country preference are unchanged from the 2021 study
- b. **Note** that the percentage of international education considerers placing New Zealand in their top three preferred destinations is steady at 13%
- c. **Note** that Kantar Research will discuss the results at the New Zealand International Education Conference 2022 on Tuesday 16 August
- d. **Note** that this briefing will be proactively released as per your expectation that information be released as soon as possible

**Noted**



Di Solomon  
**General Manager Government Relations**  
Education New Zealand



Hon Chris Hipkins  
**Minister of Education**  
[18 / 08 / 2022](#)