



## Education New Zealand Briefing

**Title:** Update on the Global Brand Tracking Report 2024  
**Date:** 22 July 2024 **Priority:** Medium  
**Security level:** Unclassified **ENZ ID no:** 2425-006

### Action sought

Addressee	Action sought	Deadline
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Minister for  
Tertiary  
Education and  
Skills

**Note** that each year, Education New Zealand Manapou ki te Ao (ENZ) commissions research to understand the health of the New Zealand education brand and what is currently driving prospective international students when considering where to study internationally.

**Note** that New Zealand is more closely competing with Singapore, France and China to attract international students when compared to a range of study destinations.

**Note** that awareness (36% in 2024) of and preference (4% in 2024) for New Zealand as a study destination has decreased slightly compared to 2023, with changes in methodology being a major contributing factor to the decrease in preference.

**Note** that Education New Zealand will share the results at the New Zealand International Education Conference KI TUA 2024 on 7 August.

**Agree** that this briefing will be proactively released with any information needing to be withheld done so in line with the provisions of the Official Information Act 1982.

### Contact for telephone discussion (if required)

Name	Position	Cellphone	1 <sup>st</sup> contact
Geoff Bilbrough	General Manager Marketing and Communications	021 776 443	X
Dr Linda Sissons	Acting Chief Executive	s9(2)(a)	

### The following departments/agencies have seen this report

MoE     NZQA     MBIE     MFaT     TEC     Other:

### Comments

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### Executive Summary

International education is a globally competitive industry with prospective international students usually selecting the country to study in before selecting their course or preferred education provider. This means that it is important to understand whether prospective international students are aware of New Zealand as a study destination and would prefer to study in New Zealand. This is Education New Zealand Manapou ki te Ao's (ENZ's) key focus of its brand and marketing investment. It enables international education providers to then focus on promoting themselves and their education offerings.

Each year, ENZ commissions research to understand the health of the New Zealand education brand and what is currently driving prospective international students when considering where to study internationally.

The research surveyed 16-24 year olds who are interested in studying internationally. The survey was run in April 2024 in Brazil, China, India, Indonesia, Japan, South Korea, Thailand, the United States of America (USA) and Viet Nam.

Across all markets, the research shows that:

- 36% of survey respondents identify that New Zealand is a study destination when shown a list of potential study destinations (known as "prompted awareness"). This is comparable to the 2023 result (37%)
- 4% rank New Zealand as the top study destination that they would prefer to study at (known as "preference"). This has decreased from 7% in 2023. The methodology changes including an expanded list of competitor countries in 2024, are a major contributing factor in this decrease.

These results mean that New Zealand continues to have low prompted awareness and preference as a study destination compared to the USA, United Kingdom, Australia and Canada. It also shows that the brand health for New Zealand is more similar to Singapore, France and China.

The survey respondents also identified the key drivers of their preferences between competitor countries. The top drivers were around availability of accommodation, being an easy place to live and study, opportunities for further study or work, and the reputation of a country's education system.

This research continues to highlight the nuances of attracting prospective students from each of our markets. These nuances will inform market-specific activities that ENZ plans to

undertake for 2024/25 to build greater awareness and preference to achieve the Government's goal for doubling export revenue from international education.

ENZ will present the research results to the international education sector at the New Zealand International Education Conference (NZIEC KI TUA) on 7 August 2024. ENZ is moving the timing of this annual research with the next survey to be run each October, starting in October 2024. This will enable the research to be used to inform ENZ's environmental scanning and business planning processes.

## Recommendations

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Education New Zealand recommends that you:

**Note** that each year, Education New Zealand Manapou ki te Ao (ENZ) commissions research to understand the health of the New Zealand education brand and what is currently driving prospective international students when considering where to study internationally.

**Note** that New Zealand is more closely competing with Singapore, France and China to attract international students when compared to a range of study destinations

**Note** that awareness of (36% in 2024) and preference for (4% in 2024) New Zealand as a study destination has decreased slightly compared to 2023, with changes in methodology being a major contributing factor to the decrease in preference

**Note** that ENZ will share the results at NZIEC KI TUA 2024 on 7 August

**Agree** that this briefing will be proactively released with any information needing to be withheld done so in line with the provisions of the Official Information Act 1982

**Agree / Disagree**



Dr Linda Sissons  
**Acting Chief Executive  
Education New Zealand**



Hon Penny Simmonds  
**Minister for Tertiary  
Education and Skills**

24/7/2024

## Purpose

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1. To provide a high-level summary of the findings of the Global Brand Tracking Report 2024, including preference for a New Zealand education, commissioned by Education New Zealand Manapou ki te Ao (ENZ). ENZ will discuss the results with the international education sector at the New Zealand International Education Conference KI TUA 2024 on Wednesday 7 August.

## Background

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2. Countries compete for international students based on the attractiveness of their overall offering that they offer to international students. Typically, prospective international students first select the country to study in. ENZ's key focus of its brand and marketing investment is build interest, awareness and preference for a study destination which is important as international education providers can then build on country awareness/preference to promote themselves and their education offerings.
3. The brand tracking research is an annual survey of more than 4,000 people who are interested in studying overseas (known as "considerers") who were surveyed online in Brazil, China (split into Tier 1 and New Tier 1)<sup>1</sup>, India, Indonesia<sup>2</sup>, Japan, South Korea, Thailand, the United States of America (USA) and Viet Nam. The 2024 survey field work dates were 3-29 April 2024.<sup>3</sup>
4. Survey respondents were 16-24-year-olds who are interested in studying in an English-speaking country. In each country, 25% of students were aged 16-17 and 75% were 18-24.
5. This is the first research completed by a new partner, Accenture (Fifty-five 5).<sup>4</sup> In 2024, a pilot survey was undertaken prior to the main survey to ensure the effectiveness of the approach. With the change in partner, a change in methodology was made which included expanding the list of competitor countries assessed for preference and surveying from a wider geographic area in countries (not just main centres) which gives richer, more actionable market information and insights. As explained further in the briefing, these changes have made it difficult to compare some of the 2024 results with 2023.
6. As ENZ is focused on growing and diversifying the number and value of students studying with New Zealand, ENZ uses this research to report on its Statement of Intent measure *Maintain brand preference in targeted markets* and its Statement of Performance Expectations measure *Increased brand awareness in targeted markets*.

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<sup>1</sup> China Tier 1 comprises Beijing, Guangzhou, Shanghai and Shenzhen. China New Tier 1 comprises other large cities in China (Chengdu, Hangzhou, and Wuhan).

<sup>2</sup> Indonesia was not included in the 2023 research but is included in the 2024 research.

<sup>3</sup> Due to the timing, recent major policy announcements by competitor countries (including Australia and Canada) relating to international students will not be reflected in this research.

<sup>4</sup> The research was previously undertaken on ENZ's behalf by Kantar.

## Awareness and preference for New Zealand education

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### Spontaneous/unprompted awareness

7. Spontaneous/unprompted awareness is when survey respondents identify New Zealand as a study destination when asked which countries come to mind when thinking about international education i.e. without a list of countries in front of them.
8. Our 2024 research shows that many prospective students have a stereotypical view of New Zealand. More generally, New Zealand is widely known for the natural environment, outdoors and leisure activities, although the attributes associated with New Zealand vary between each market.
9. Many prospective students do not immediately associate New Zealand with education, reducing the likelihood that they are aware of New Zealand's education offerings (refer to Appendix 1). However, spontaneous/unprompted awareness for New Zealand is strongest in Thailand (23%) and China Tier 1 (22%); both markets are where prospective international students are also more likely to identify education attributes when asked to describe New Zealand.

### Prompted awareness

10. Prompted awareness is when survey respondents identify that New Zealand is a study destination when shown a list of potential study destinations. Globally, prompted awareness of New Zealand education was 36% which is in line with the 2023 score of 37% (refer to Appendix 2).
11. New Zealand's brand health, as measured by prompted awareness, is strongest in China Tier 1 (54%), followed by China New Tier 1 (46%) and India (41%) which are New Zealand's top two sources of international students.

### Preference

12. Preference for a New Zealand education is when survey respondents rank New Zealand as the study destination that they would prefer to study at when provided with a list of countries.
13. Overall preference to study in New Zealand is 4%, a decrease from 7% in 2023. The methodology changes in 2024, including a larger set of competitor countries, are a major contributing factor to the decrease in preference scores. Like previous years' brand tracking research, the 2024 research shows that low awareness of New Zealand continues to drive low preference scores across all markets. i.e. preference cannot increase without first increasing awareness of a New Zealand education.

## New Zealand's performance compared to other countries

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14. Attracting international students is a globally competitive industry. When it comes to other destinations for international students, New Zealand most closely competes with

Singapore, France and China (refer to Appendix 3).<sup>5</sup> The USA, United Kingdom and Australia are the destinations with the highest awareness and preference scores. These results identify that New Zealand is not only competing with our traditional competitor English speaking countries, but also with a wider range of emerging competitor countries that are seeking to attract international students.

## **What is important to prospective students when choosing a study destination**

15. The survey respondents were asked to rank a range of “preference driver” statements that are guiding their preference in selecting where to study. In 2024, the research contained an expanded list of “preference driver” statements so the 2024 results are unable to be compared to previous years.
16. In 2024, the top five drivers of respondents’ preference were:
- accommodation options that meet my needs (new statement in 2024)
  - being an easy place to live and study
  - clear opportunities for further study once initial studies are complete (new statement in 2024)
  - offers opportunities for work in my field once my study has finished
  - their education system has a good reputation in my home country.
17. Over the last few years, concerns around accommodation globally have been viewed as an issue. It is likely to be in response to general housing crises across the globe and issues around the availability of student accommodation in competitor countries, such as the United Kingdom, Australia, and Canada.<sup>6</sup> ENZ notes that accommodation has also been the rationale for some of the policy changes implemented by New Zealand’s competitors, including Canada’s cap on the number of international students and restrictions on international students bringing dependents with them to the United Kingdom unless the student is studying a research postgraduate programme.
18. There is a cluster of preference drivers focused on New Zealand’s physical environment, lifestyle and quality of life that ENZ can leverage to differentiate New Zealand from its competitors. In contrast, the key driver that needs to be improved is respondents’ perceptions of the quality of the New Zealand education system. ENZ has been working to improve perceptions of the education system through recent brand and marketing activities, for example social media posts and press releases for international media about teenagers in New Zealand being among the most creative thinkers in the world according to the latest edition of OECD’s Programme for International Student Assessment (PISA) Volume 3 results.
19. There are significant differences in preference drivers by market (refer to Appendix 4). These nuances will inform market-specific activities that ENZ plans to undertake for

<sup>5</sup> Both Singapore and China have been included in the list of competitor countries used in previous years’ research, but this is the first time France has been included in the list of competitors. Previous brand tracking research focused on competitors that were English-speaking countries or Asian countries that enrolled large numbers of international students.

<sup>6</sup> Media reporting on this issue includes <https://www.bbc.com/news/articles/cn0r43j899xo>, <https://thepienews.com/international-students-unfairly-blamed-for-australian-rental-crisis/>, <https://www.cbc.ca/news/canada/british-columbia/international-students-unsuitable-housing-stats-canada> and <https://thepienews.com/accommodation-issues-world/>.



2024/25 to build greater awareness and preference to achieve the Government's goal for doubling export revenue from international education.

## Conclusion

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20. There is significant variation in awareness of New Zealand across target markets. At best, one in two students are aware of New Zealand as destination for international study. In the long term, ENZ will work to build awareness of New Zealand as a study destination in its "growth" markets<sup>7</sup> to drive diversification. More broadly, there is a role for tailored strategies across markets (refer to Appendix 5). As noted previously this is a focus for ENZ in 2024/25.

## Next steps











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21. The findings have been incorporated into ENZ's marketing plans for 2024/25 and will see even more tailoring of activities to address the specific needs of the market and the sectors in each.
22. As this research is a useful input into the environmental scanning that starts ENZ's business planning process, ENZ is moving the timing of this annual research to later in the calendar year. As a result, the next survey will be run in October 2024. We expect to inform you of the results before the end of 2024.

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<sup>7</sup> These are markets with segments where recovery has been slow and lags previous performance; and/or are identified by the sector and ENZ with the potential for growth.

**Appendix 1: Attributes generally associated with New Zealand by market (Top 5 ranked in 2024)<sup>8</sup>**

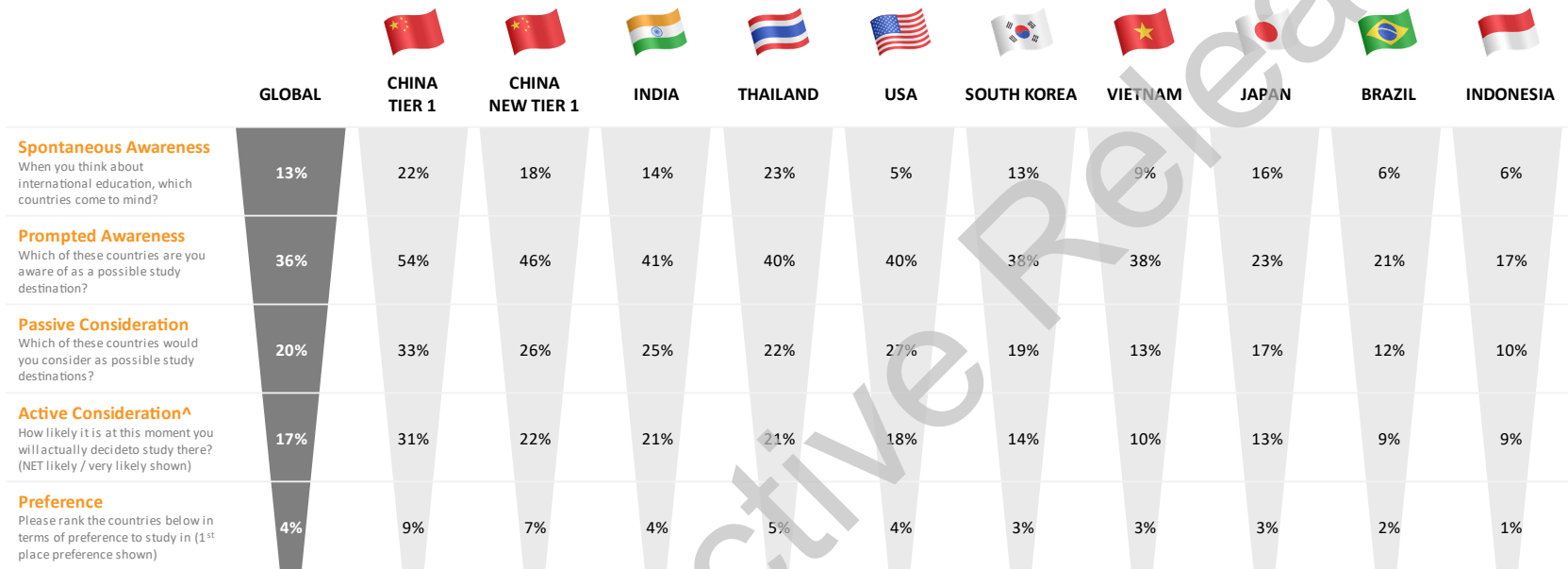
	 CHINA TIER 1	 CHINA NEW TIER 1	 INDIA	 BRAZIL	 USA	 JAPAN	 SOUTH KOREA	 VIETNAM	 THAILAND	 INDONESIA
Has a beautiful natural environment	3		2	1	1	1	1	1	1	1
Offers opportunities for outdoor leisure and adventure activities	2		5	2	2	4	2	2	3	3
Would be a unique cultural experience	4					2	5			2
A safe place to live and study			3		4	5		4	2	5
Is welcoming and accepting of people from other countries					5			5		4
Provides an opportunity for personal growth		2	1				3			
Provides stimulating experiences inside and outside the classroom					3	5			4	
Offers a quality education			4	2				3	5	
Offers life experiences that challenge me				4			4			
Accommodation options that meet my means	5									
Has internationally recognised qualifications		1								
Opportunities for scholarships and financial assistance		4								
Access to affordable and highquality healthcare		5		5						
An affordable place to live and study	1									
Clear opportunities for migration after my studies		3								

<sup>8</sup> The question is “From the list below, please tell us which country or countries that you associate with each of the following statements. You can choose as few or as many countries as you like.”





**Appendix 2: Awareness, consideration and preference for New Zealand education for each market (2024)**



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**Appendix 3: Overall awareness, preference and consideration for each competitor country (2024)**

	UNITED STATES	UNITED KINGDOM	AUSTRALIA	CANADA	JAPAN	GERMANY	FRANCE	SINGAPORE	NEW ZEALAND	CHINA	IRELAND	MALAYSIA
<b>Spontaneous Awareness</b> When you think about international education, which countries come to mind?	60%	55%	40%	34%	30%	29%	30%	19%	13%	18%	5%	4%
<b>Prompted Awareness</b> Which of these countries are you aware of as a possible study destination?	72%	64%	59%	53%	52%	47%	44%	40%	36%	28%	21%	17%
<b>Passive Consideration</b> Which of these countries would you consider as possible study destinations?	48%	46%	41%	34%	27%	27%	24%	23%	20%	11%	12%	7%
<b>Active Consideration<sup>^</sup></b> How likely it is at this moment you will actually decideto study there? (NET likely / very likely shown)	42%	40%	36%	28%	23%	22%	20%	19%	17%	9%	9%	5%
<b>Preference</b> Please rank the countries below in terms of preference to study in (1 <sup>st</sup> place preference shown)	24%	16%	13%	8%	10%	6%	5%	5%	4%	3%	2%	1%

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**Appendix 4: Prospective students' drivers of preference by each market (Top 5 ranked in 2024)**

	 CHINA TIER 1	 CHINA NEW TIER 1	 INDIA	 BRAZIL	 USA	 JAPAN	 SOUTH KOREA	 VIETNAM	 THAILAND	 INDONESIA
Accommodation options	5		5	1	5	4		1	1	
Further study after initial studies	3		4		2			2		5
Easy place to live & study		1	2		1			5		1
Work after completing studies				2	3		4	3	2	
Education system reputation	2		1				1	4		
Work while studying		2		3			5			
Quality education	4	3	3			3				
High living standard	1	5		5					4	
Skills & qualifications needed		4								4
Stimulating experiences						1				
Migration after my studies					4				3	
Personal growth										3
Scholarship & financial assistance				4					5	2
Highly ranked institutions							2			
Internationally recognised							3			
Welcoming & accepting					5					
Challenging life experiences					2					



**Appendix 5: Key findings by market (2024)**

										
	CHINA T1	CHINA NEW T1	INDIA	USA	THAILAND	VIETNAM	SOUTH KOREA	JAPAN	INDONESIA	BRAZIL
KEY PRIORITY METRICS	Preference	Consideration & Preference	Spontaneous awareness & Preference	Spontaneous awareness & Preference	Spontaneous awareness & Consideration	Awareness & Consideration	Awareness & Consideration	Awareness	Awareness	Awareness
STRONGEST COMPETITORS	UK	UK	USA	UK	USA	Australia	USA	USA	Japan	USA
	USA	USA	UK	France	Australia	USA	Canada	Australia	UK	Canada
	Australia	Australia	Canada	Japan	Japan	UK	Australia	UK	USA	UK
CLOSEST COMPETITORS	Singapore	Germany	Singapore	Ireland	China	Singapore	Singapore	Singapore	France	Australia
	France	Canada	France	China	Singapore	France	France	France	Malaysia	Japan
	Canada	Japan	Japan	Singapore	Canada	China	Germany	Germany	China	Ireland
FOCUS AREAS	Good education system reputation	Offers a high standard of living	Internationally recognised qualifications	Opportunities for further study	Opportunities for work within my field	Opportunities for work within my field	Internationally recognised qualifications	Offers a quality education	Highly ranked institutions	Good education system reputation
	Offers a high standard of living	Provides skills & qualification that are needed	Highly ranked institutions	Good education system reputation	Highly ranked institutions	Highly ranked institutions	Highly ranked institutions	Opportunities for further study	Scholarships & financial assistance	Opportunities for further study
	Provides skills & qualification that are needed	An easy place to live and study	Good education system reputation	Opportunities for work within my field	Scholarships & financial assistance	Good education system reputation	Good education system reputation	Good education system reputation	Provides skills & qualification that are needed	Opportunities for work within my field