



Ipsos Marketing

Improving Marketing Effectiveness by Better Understanding Perceptions and Needs of Taiwanese Potential Students, Parents, and Education Agents
Results of Tertiary, Language course & Vocational training Parents

Prepared for: Education New Zealand



22th June, 2012

© 2012 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.



Content

1. Executive Summary
2. Research Overview
3. Key Findings
4. Appendix
 - a) Detailed Results
 - b) Questionnaires

Executive Summary



Executive Summary (1) – New Zealand as a Study Destination

- ENZ's focus for action should be on growing consideration of NZ as a place of study among potential students and parents. Although agents are supportive and favorable of NZ, this favorable perception among agents did not translate into good perceptions in students and parents' minds. Therefore, targeting education agents is not sufficient.
 - ⇒ Consideration among students and parents is low, mainly due to a *lack of familiarity of NZ as a place of study* (as opposed to a place to holiday or live), and *weak perceptions of NZ* on factors important to Taiwanese people.

- Consideration of NZ among Tertiary, Language course & Vocational Training parents is the lowest among the key Western destination countries. The main factors include:
 - ⇒ *A lack of familiarity of NZ as a place of study,*
 - ⇒ *A lack of awareness of NZ's education institutions and educational strengths or specialties,*
 - ⇒ *Perceptions of relatively few Taiwanese people having studied in NZ* (also resulting in *less positively reinforcing word-of-mouth*).

- In conclusion, increasing awareness of NZ as a place of study among Taiwanese is probably ENZ's first step to take, as the biggest issue faced is that students and parents typically do not put NZ in their consideration set when choosing a country.



Executive Summary (2) – Country Choice Drivers

- The most important driver of country choice for Taiwanese students and parents is the *reputation of the intended qualification or the place of study*.
 - ⇒ NZ had weak associations with important drivers relating to *qualification and specialty reputation*, contributing to lower consideration of NZ generally.
- The strongest perceptions of NZ among Tertiary, Language/Vocational Training parents were non-educational factors – *lower cost, safety, good for raising children, good weather* etc. NZ was perceived on par with Australia as a lower cost place of study.
- More focus should also be placed on promoting NZ's educational strength (e.g., *qualification, reputation, and the best place of the study*), which are key factors in driving country choice.

- ENZ may need to revise its marketing approach in Taiwan to communicate more about NZ's education-specific strengths, particularly regarding the *reputation of NZ's qualifications, subject specialties, or institutions*. Communicating the ranking of NZ's schools may be useful as Taiwanese students and parents are likely to be particularly interested in this information.

- Some areas should be de-emphasized in communications. Although NZ is strongly associated with *good climate* and *outdoors activities*, these factors are less important to Taiwanese people when choosing a study destination (not a holiday destination).

- More advertising or PR would be needed to enhance people's knowledge about studying in NZ. Apart from the main personal sources of word-of-mouth from friends, family, and school teacher,
 - ⇒ Traditional media such as TV or print advertising, or possibly PR (maybe sponsored TV shows) will be a more effective way to reach Tertiary, Language/Vocational Training parents.

Research Overview



Research Background and Objectives

- **Research Background:**

- ⇒ Education New Zealand wants to increase the share of New Zealand as an education destination country among Taiwanese students. This research was commissioned particularly to better understand perceptions of New Zealand among Taiwanese consumers and their education needs.

- **Research Objectives:**

- ⇒ Identify current levels of consideration of New Zealand as a study destination.
 - ⇒ Understand perceptions of New Zealand as a study destination, and New Zealand's "brand equity".
 - ⇒ Identify the perceived strengths and weaknesses of New Zealand relative to other competing study destination countries.
 - ⇒ Understand willingness to recommend New Zealand among education agents.
 - ⇒ Understand which factors drive preference of destination country among potential students, parents, and education agents.
 - ⇒ Understand the usage and preference of information sources.

- The research approach included the following elements:
 - ⇒ Potential students / Parents of potential students:
 - 150 quantitative interviews with potential students to understand perceptions of destination countries, drivers of choice, etc.
 - 150 quantitative interviews with parents of potential students to understand perceptions of destination countries, drivers of choice, etc.
 - ⇒ Education agents:
 - Two qualitative in-depth interviews to inform the development of the quantitative questionnaire.
 - 30 quantitative interviews to understand perceptions of destination countries, willingness to promote New Zealand, etc.
- Methodology
 - ⇒ Potential students / Parents of potential students: Face-to-face interviewing, with respondents sampled by referral.
 - ⇒ Education agents: Face-to-face interviewing, with eligible agent list provided by ENZ.
- Sample size:
 - ⇒ 150 potential students: 50% potential university/tertiary students and 50% language school / vocational training students
 - ⇒ 150 parents of potential students: 50% parents of potential secondary school students and 50% parents of tertiary/ language school/vocational training students
 - ⇒ Education agents: 30 interviews (including Specialist and non-Specialist agents)
- Geographic coverage: Taipei City, New Taipei City, Taichung City and Kaohsiung City.



Key Findings – Results of Potential Students and Parents of Potential Students



Key Findings

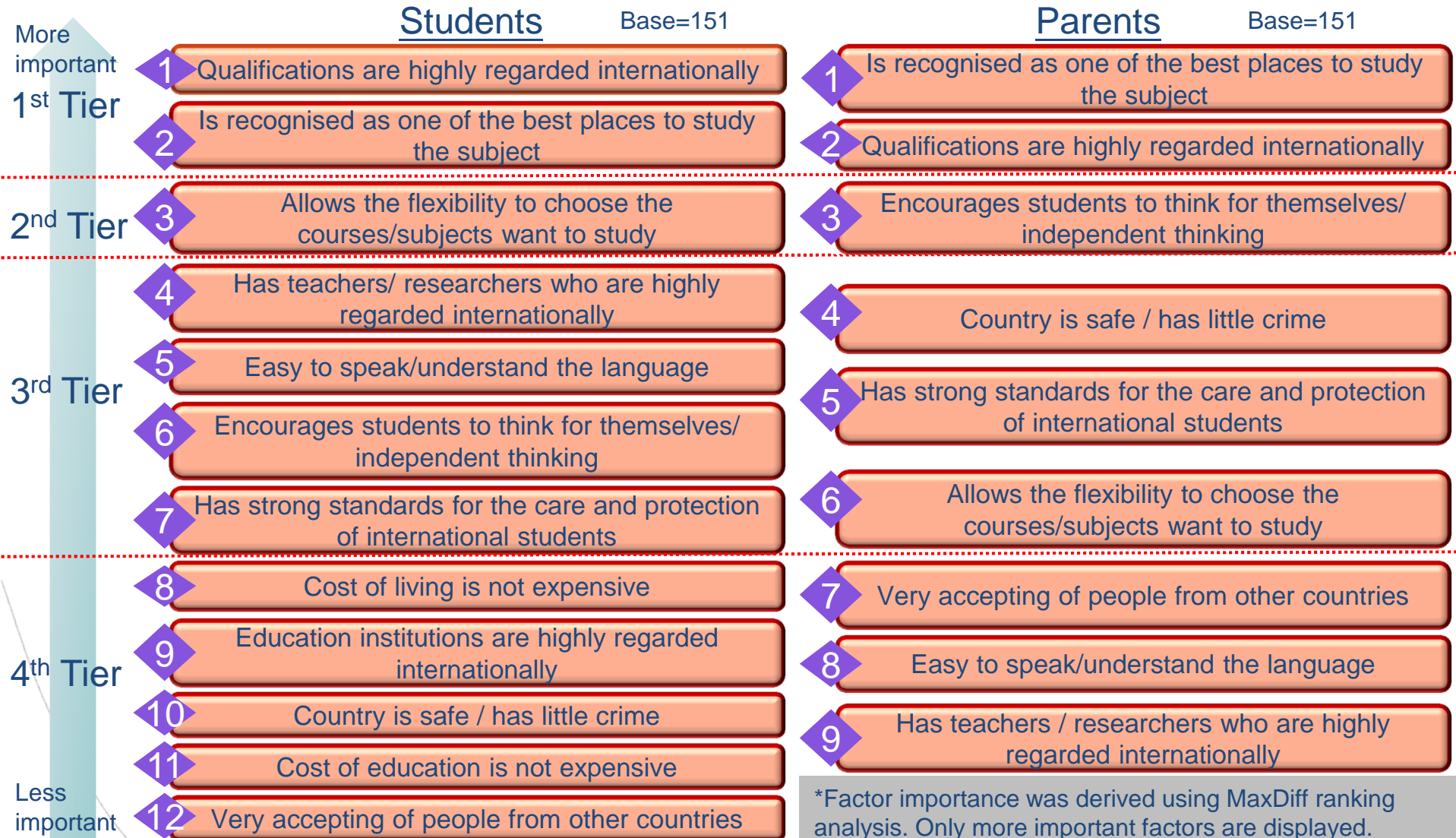
- Importance of Factors in Country Choice**

Potential students and Parents



For both students and parents, the most important driver of country choice was the reputation of the intended qualification or place of study.

Most Important Factors in Country Choice – Overall



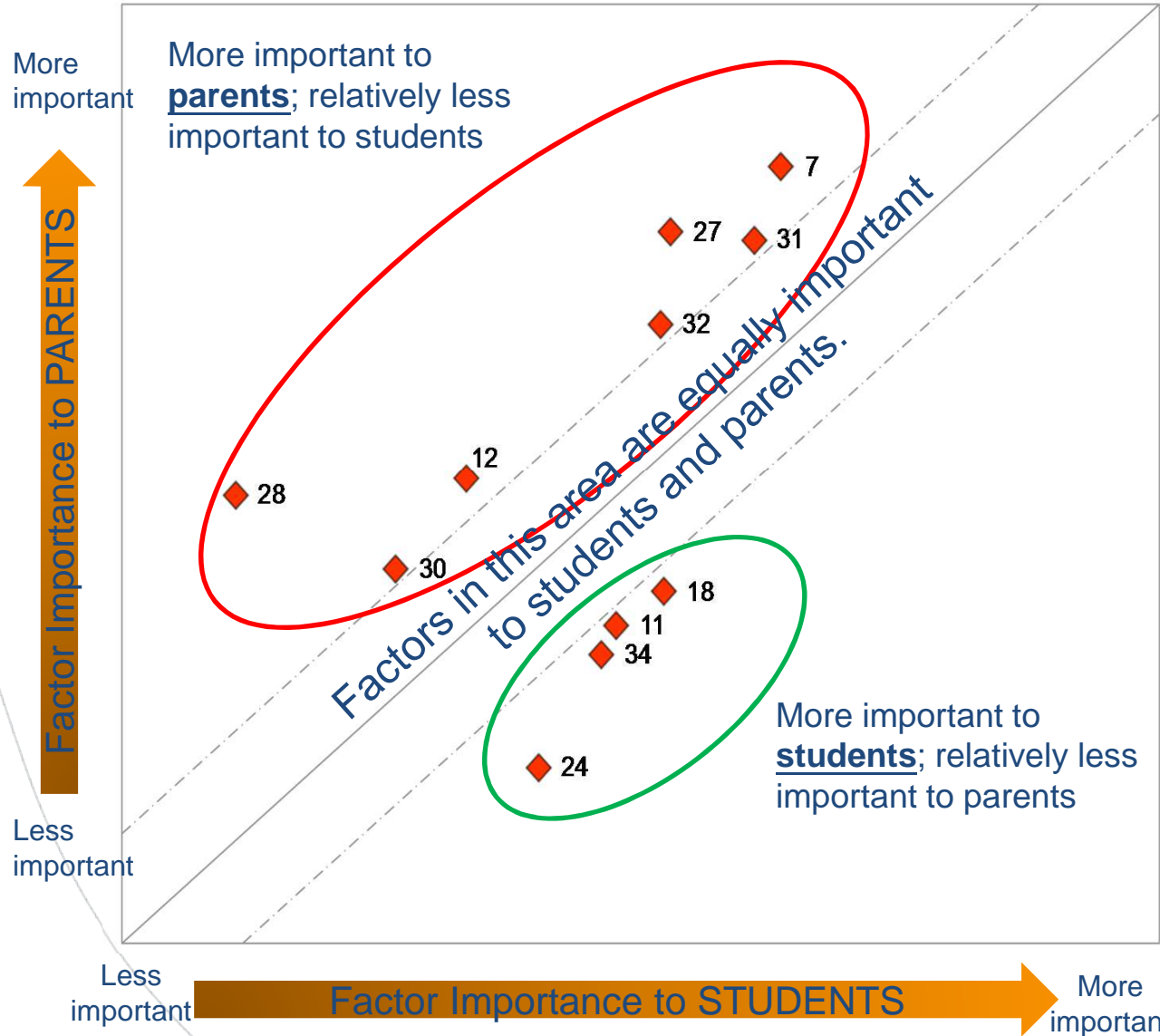
Base: All Respondents
Q9: Importance of factors in country choice

*Factor importance was derived using MaxDiff ranking analysis. Only more important factors are displayed. Please refer to the appendix for an explanation of MaxDiff and detailed importance scores for all factors.



Compared with students, parents cared more about *students' care and safety*, and *being accepted in the country*. In contrast, students were more concerned than parents about the *cost and time required* and *the diversity of people and culture*.

Differences in Factor Importance Between Students and Parents



- 7 Education system encourages students to think for themselves (encourages independent thinking)
- 11 Takes less time to complete the qualification want
- 12 I have personal experience of the country
- 18 Cost of education is not expensive
- 24 Allowed to work part-time in the country while studying
- 27 Country is safe / has little crime
Country is a good place to raise children/ Children will not learn bad behaviour or bad habits.
- 28 Many Taiwanese people live or study there
- 30 Has strong standards for the care and protection of international students
- 31 People in the country are very accepting of people from other countries
- 32 Country has a wide range/diversity of people and cultures



Tertiary, Language course & Vocational training parents (TLV parents) considered *academic qualification and reputation* as the most important factors as well as their children's safety and care.

Most Important Factors in Country Choice – Tertiary, Language course & Vocational training Parents (TLV parents)

Base=76

More important

1st Tier

- 1 Qualifications are highly regarded internationally
- 2 Is recognised as one of the best places to study the subject

2nd Tier

- 3 Encourages students to think for themselves /independent thinking)
- 4 Country is safe / has little crime

3rd Tier

- 5 Allows the flexibility to choose the courses/subjects want to study
- 6 Has strong standards for the care and protection of international students

4th Tier

- 7 Easy to speak/understand the language
- 8 Very accepting of people from other countries
- 9 Has teachers/ researchers who are highly regarded internationally

Base:
Q9:

All Respondents
Importance of factors in country choice

Key Findings

- Country Preference, Evaluation, and Perceptions**

Potential students and Parents

Key Findings

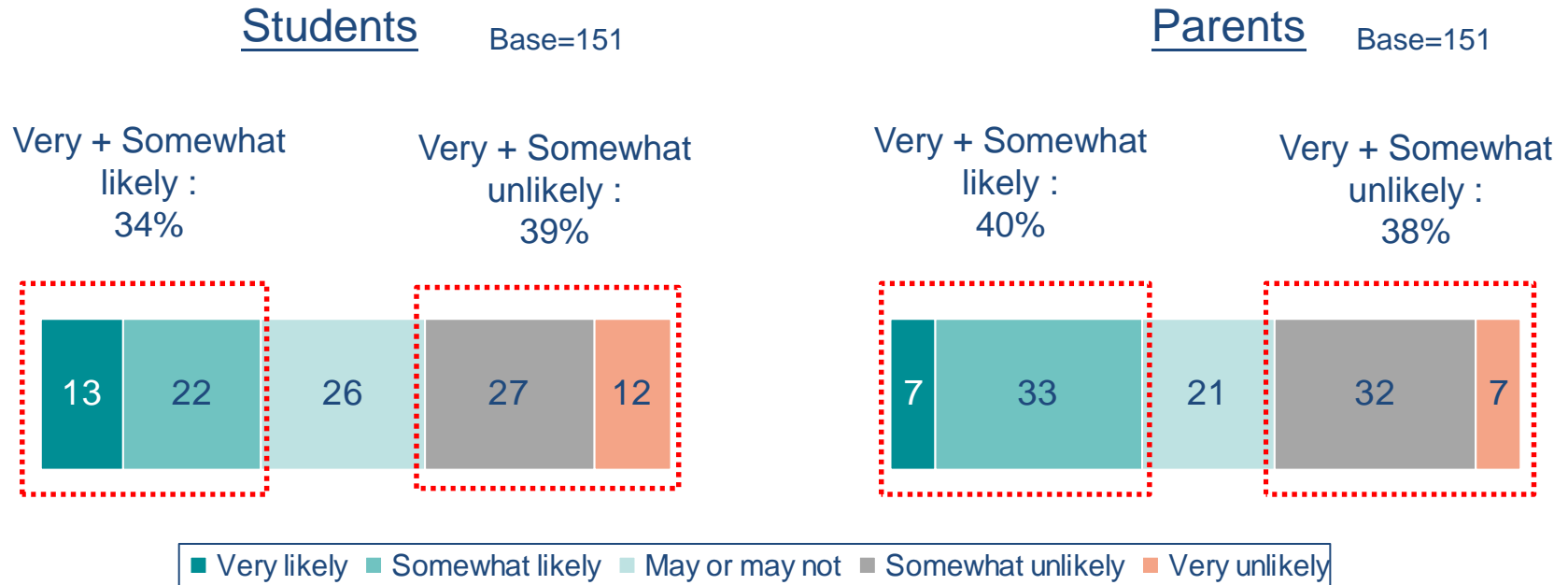
- Country Preference

Potential students and
Parents



Increasing students and parents' consideration of NZ as a place of study is strongly required. For both students and parents, the acceptance level was matched by the extent of rejection.

Likelihood of Considering Studying in New Zealand

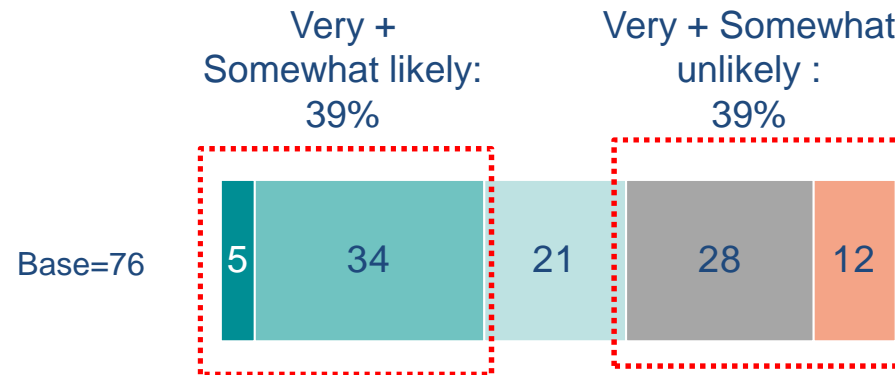


Base: All Respondents
 Q5: How likely or unlikely would you be to consider studying in New Zealand?



The likelihood of considering studying in NZ among TLV parents was on par with general parents.

Likelihood of Considering Studying in New Zealand – Tertiary, Language course & Vocational training (TLV) Parents



■ Very likely
 ■ Somewhat likely
 ■ May or may not
 ■ Somewhat unlikely
 ■ Very unlikely

Base:
Q5:

All Respondents
How likely or unlikely would you be to consider studying in New Zealand?



Lack of familiarity with NZ was the major barrier for Taiwanese people to consider studying in NZ. Enhancing knowledge of NZ as a place of study (not just holiday) is the first step to encourage people to study there. The perceived safety of NZ was a key driver to consider studying there, for both students and parents.

Motivators and Barriers to Considering Studying in New Zealand

<u>Reasons for NOT Considering Studying in New Zealand</u>	Students Parents		<u>Reasons for Considering Studying in New Zealand</u>	Students Parents	
	Base			Base	
	99	90		20	28
✗ Don't know enough about New Zealand to consider it	55	67	✓ Country is safe/ has little crime	35	32
✗ The country is not the best places to study the subject you're/ your child is interested in	29▲	16	✓ Is a good place to raise children/ Children will not learn bad behaviours or bad hobbies	20	21
✗ Don't know anyone living or studying there/have not lived or studied there	24	31	✓ Many Taiwanese people live or study there	20	14
✗ Friends/family recommend not going there	14	12	✓ Friends/family recommend it	15	7
✗ Not many Taiwanese people live or study there	11	11	✓ Cost of living is affordable/not expensive	10	21
✗ Education institutions do not have a good reputation/ not top ranking schools	10	17	✓ Easy to be accepted in educational institutions	10	11
✗ Cannot easily speak/understand the language	10	9	✓ Cost of education is affordable/ not expensive	5	18
			✓ Yourself/friends/family live or study there/have lived or studied there	5	14

Only mentioned by >10% (among total) are shown

▲ denote significantly higher result at 95% confidence level, comparing Students and Parents

Base: Those who were somewhat unlikely or very unlikely to consider studying in NZ
Q8: For what reasons would you not consider studying in New Zealand?
Base: Those who didn't prefer NZ but were likely to consider studying in NZ
Q7: For what reasons would you consider studying in New Zealand?



Among all types of parents and students, *lack of familiarity with NZ as a place of study* was the key barrier to consider studying in NZ.

Motivators and Barriers to Considering Studying in New Zealand – Tertiary, Language course & Vocational training Parents

<u>Reasons for NOT Considering Studying in New Zealand</u>		<u>Reasons for Considering Studying in New Zealand</u>	
	Base		Base
✗ Don't know enough about New Zealand to consider it	46	✓ Country is safe/has little crime	13*
✗ Don't know anyone living or studying there/have not lived or studied there	76	✓ Is a good place to raise children/Children will not learn bad behaviours or bad hobbies	23
✗ The country is not the best places to study the subject interested in	28	✓ Yourself/friends/family live or study there/have lived or studied there	15
✗ Education institutions do not have a good reputation	24	✓ Easy to be accepted in educational institutions	23
✗ Not many Taiwanese people live or study there	20	✓ Cost of education is affordable/not expensive	15
✗ Friends/family recommend not going there	9	✓ Many Taiwanese people live or study there	8
	7	✓ Friends/family recommend it	8
		✓ Cost of living is affordable/not expensive	8

Only mentioned by >10% (among total) are shown

Base: Those who were somewhat unlikely or very unlikely to consider studying in NZ
Q8: For what reasons would you not consider studying in New Zealand?
Base: Those who didn't prefer NZ but were likely to consider studying in NZ
Q7: For what reasons would you consider studying in New Zealand?

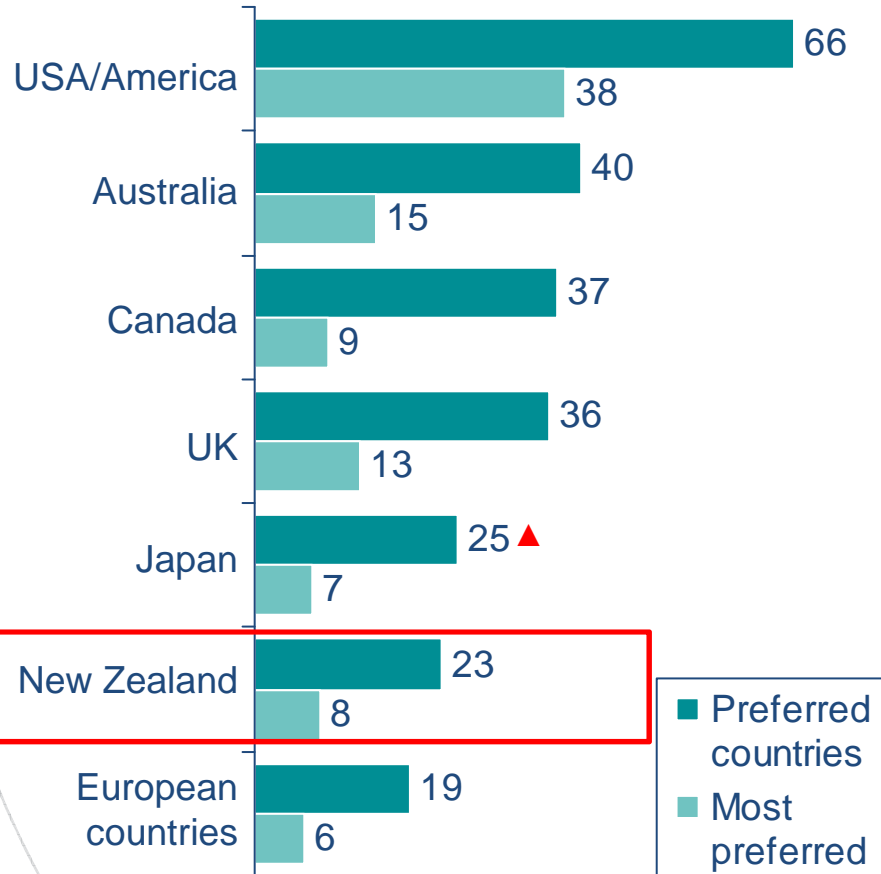


Students and parents had similar preference for destination countries – USA first and NZ last among key competitors. Among students, NZ was preferred on par with Japan.

Preferred Destination Study Countries

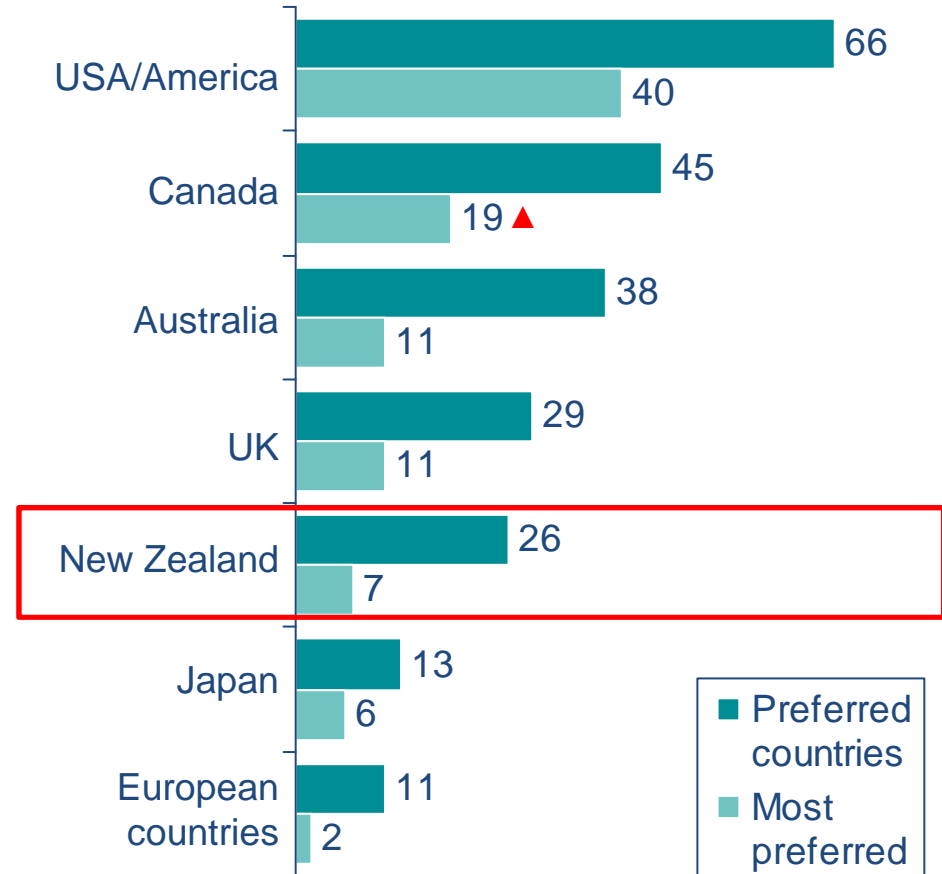
Students

Base=151



Parents

Base=151



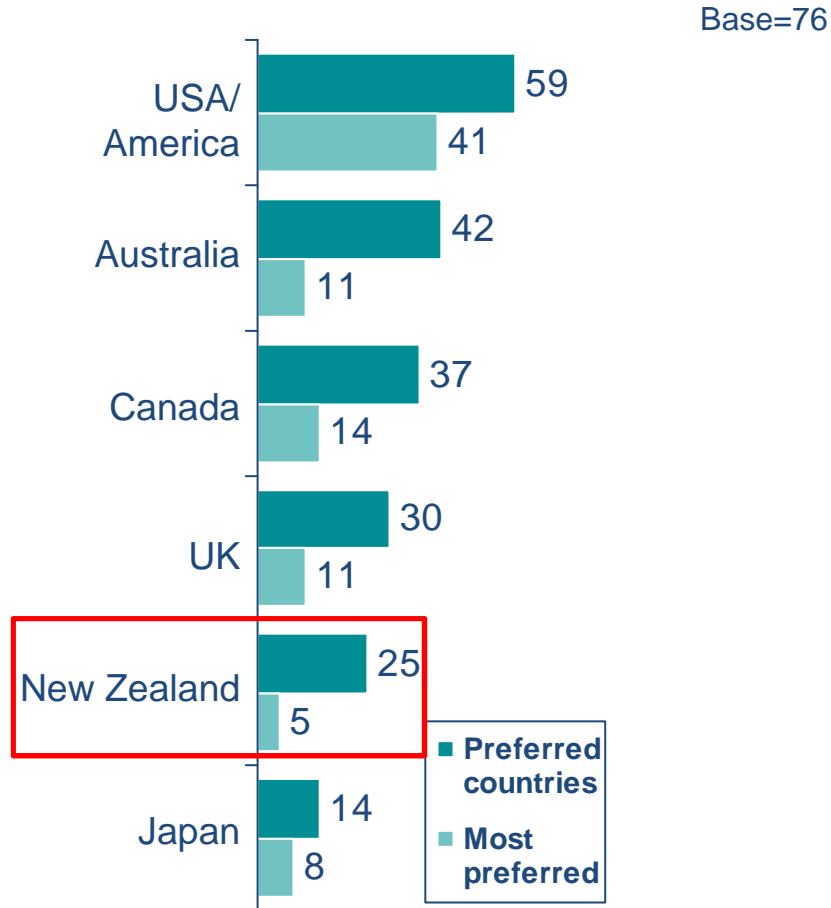
▲ denote significantly higher at 95% confidence level, comparing Students and Parents

Base: All respondent
Q1: Which countries are you currently considering studying or training in?
Q2a: Which of these countries do you currently most prefer?



Among TLV parents, their preference toward NZ was on par with UK.

Preferred Destination Study Countries – Tertiary, Language course & Vocational training (TLV) Parents



Base: All respondent
 Q1: Which countries are you currently considering studying or training in?
 Q2a: Which of these countries do you currently most prefer?

Key Findings

- Country Evaluation

Potential students and
Parents



Measuring NZ's "Brand Equity"

- We used "Attitudinal Equity (AE)" to measure how strongly people want to study in each country (NZ and key competitors).
- Two inputs were used:

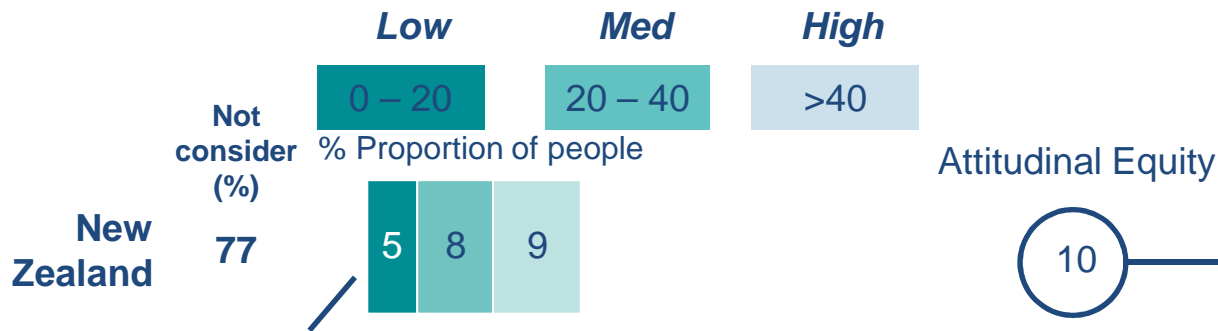
Q1
Performance
How would you rate each country in terms of your overall feelings?
(10 pt)



(Attraction relative to competition)

Q2
Appeal
How important is this country to you?
(7 pt)

- AE results can be interpreted as below:



% of people with varying strengths of desire to study in NZ; e.g. 5% have a *weak* desire to study in NZ, whereas 9% have a *strong* attraction to study in NZ.
In NZ's case, a key barrier is that 77% do not even consider studying in NZ.

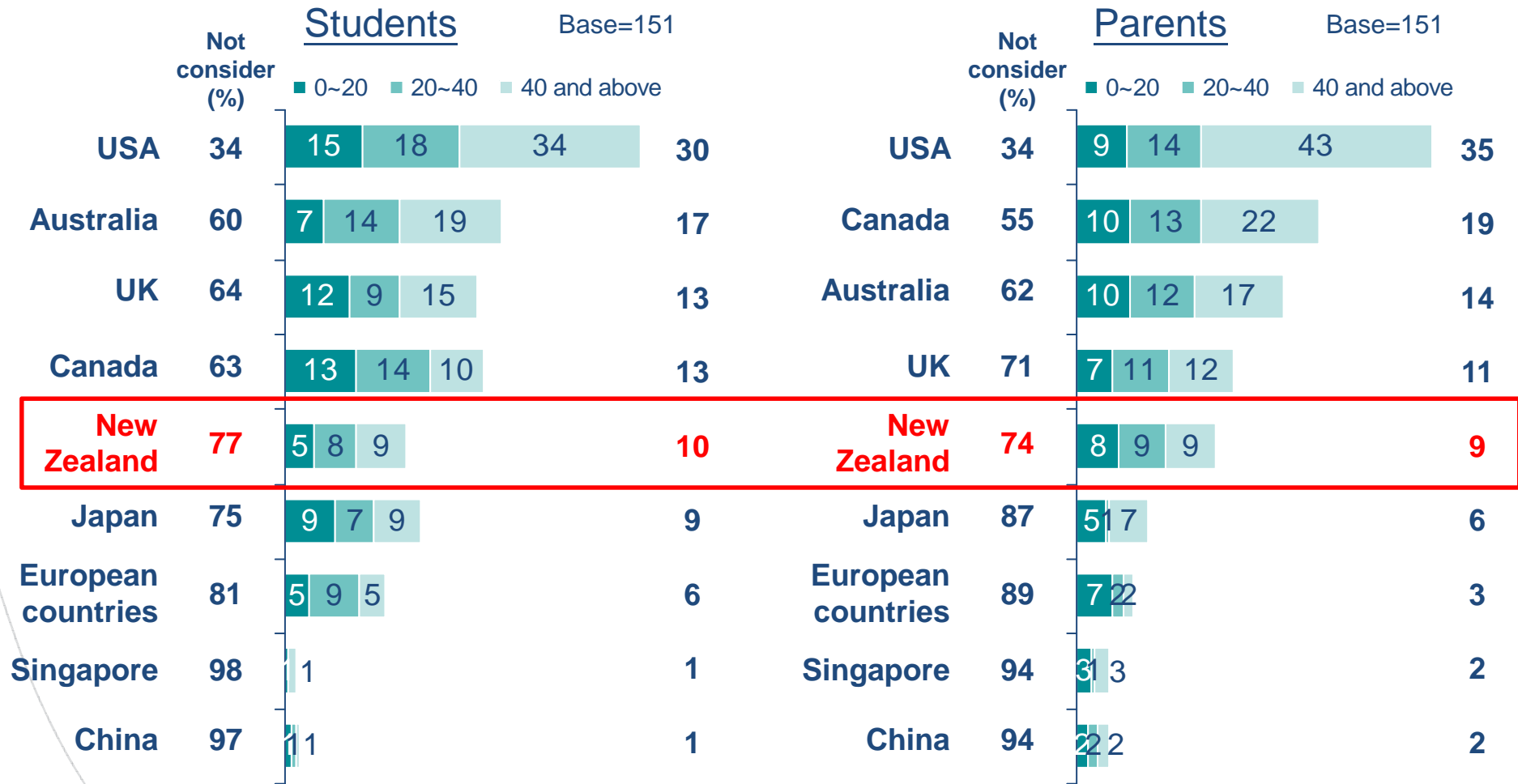
Among the countries, NZ has a "share of mind" 10%. This shows how much people "like" NZ overall, relative to their liking of competitors.



NZ's brand equity was similar among both students and parents, with *a lack of consideration* being the key contribution to weak brand equity. Increasing knowledge of NZ as a place of study is required to lift consideration of studying in NZ.

Although USA is dominant, its brand equity is stronger among parents than students.

Attitudinal Equity of Each Country



Base: All respondent
 Q3: How would you rate each of the following countries in terms of your overall opinion of it as a place to study?
 Q4: How important is your relationship with each of the following countries to you in terms of being a place to study?



Among parents and students who considered one country more important than others, students based this perceived greater importance on the country's *good environment*, while parents were more affected by *having relatives or friends living there*, reflecting the relatively greater importance of students' safety and care to parents.

Reasons For Rating One Particular Country the Most Important

Overall	Students		Parents		USA	Students		Parents		New Zealand	Students
	Base					Base					
<Environments>	75	73	75	73	<Environments>	71	64	<Environments>	100	6	
✓ Good environment/ beautiful natural scene	28 ▲	4	28 ▲	4	✓ Is a good place/ suitable place for learning the language	29	8	✓ Good environment/ beautiful natural scene	50		
✓ Is a good place/ suitable place for learning the language	15	13	15	13	✓ Country has a wide range/diversity of people and cultures	25	12	✓ Good climate	33		
✓ Has more job vacancies/ easy to find jobs/part-time works/ intern jobs	14	9	14	9	✓ Many Chinese people live in the country	17	12	<Cost>	33		
✓ Country has a wide range/diversity of people and cultures	11	9	11	9	✓ People in the country are very accepting of people from other countries	17	8	✓ Cost of living/study is affordable/not expensive	33		
✓ Country is safe/has little crime	6	18 ▲	6	18 ▲	<Schools/ Qualifications>	54	40				
✓ Familiar with the language/ culture/ Can speak the local language	8	13	8	13	✓ Has many top schools/schools with good reputation	25	16				
<Schools/ Qualifications>	37	31	37	31	✓ Has many schools to choose from	21	8				
✓ Has many top schools/ schools with good reputation	12	11	12	11	<Others>	8	40 ▲				
<Others>	15	38 ▲	15	38 ▲	✓ Have relatives/friends in that country	8	36 ▲				
✓ Have relatives/ friends in that country	11	29 ▲	11	29 ▲							

*There were no parents rated NZ as the one most important country. Thus, only students' result is shown for NZ..

*Only NZ and USA are shown; only reasons mentioned by more respondents are shown

▲ denote significantly higher at 95% confidence level, comparing Students and Parents

Base: Those who select one most important country
 Q4a: For what reasons is [country] so important to you?

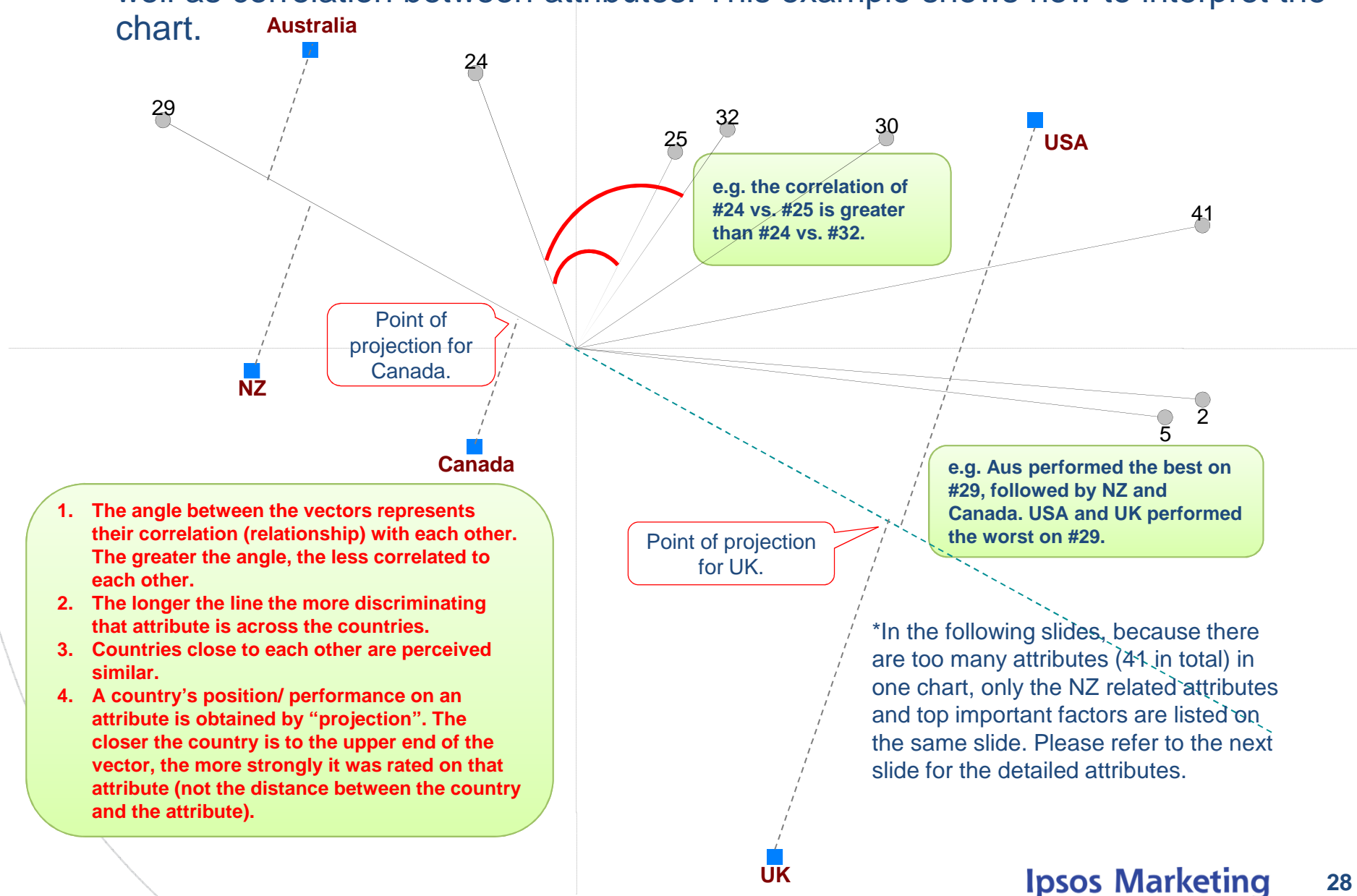
Key Findings

- Country Perceptions

Potential students and
Parents

Country Perceptions and Performance

The following slides use a “biplot” to show country performance on attributes, as well as correlation between attributes. This example shows how to interpret the chart.



1. The angle between the vectors represents their correlation (relationship) with each other. The greater the angle, the less correlated to each other.
2. The longer the line the more discriminating that attribute is across the countries.
3. Countries close to each other are perceived similar.
4. A country's position/ performance on an attribute is obtained by "projection". The closer the country is to the upper end of the vector, the more strongly it was rated on that attribute (not the distance between the country and the attribute).

*In the following slides, because there are too many attributes (41 in total) in one chart, only the NZ related attributes and top important factors are listed on the same slide. Please refer to the next slide for the detailed attributes.



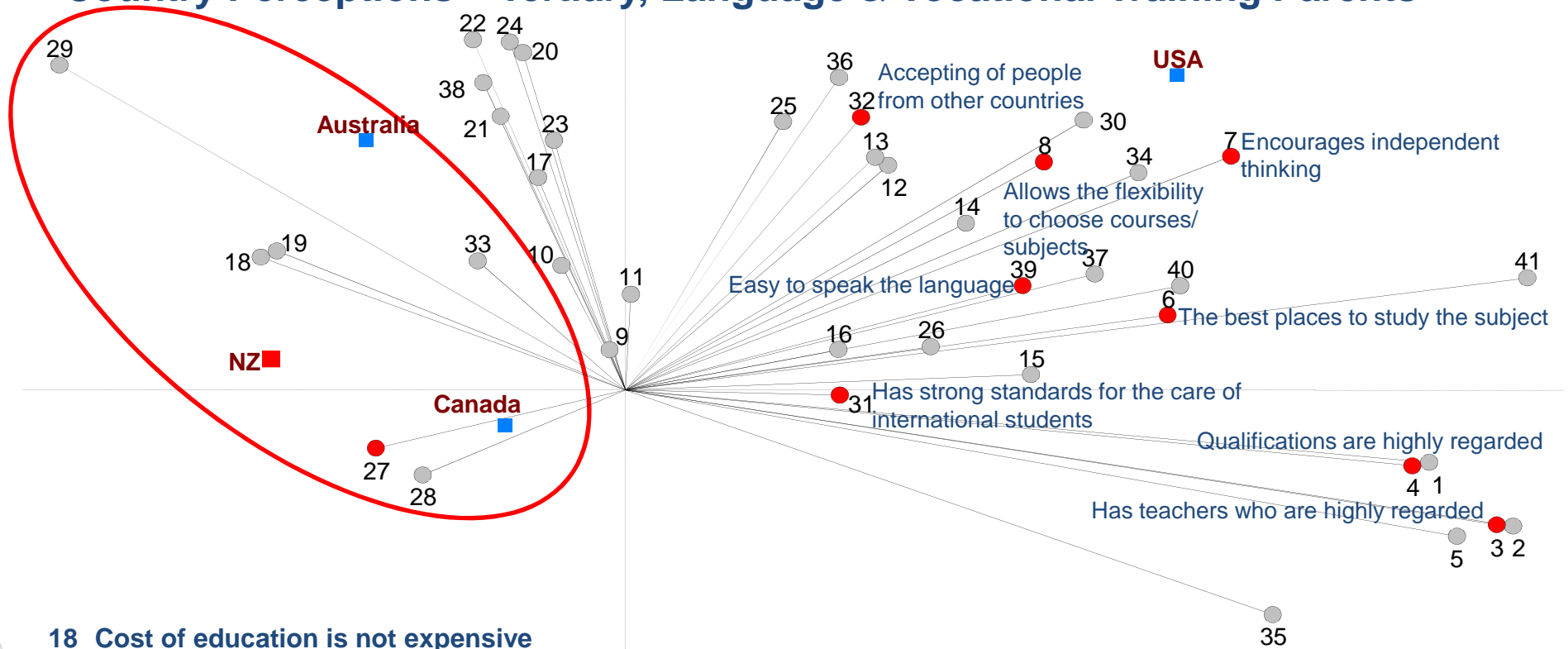
Detailed attributes used in the biplots

- 1 Education institutions are highly regarded internationally
- 2 Education institutions are historic / have a long history
- 3 Has teachers / researchers who are highly regarded internationally
- 4 Qualifications are highly regarded internationally
- 5 Famous/highly regarded people have studied in the country
- 6 The country is recognised as one of the best places to study the subject interested in
- 7 Education system encourages students to think for themselves (encourages independent thinking)
- 8 Allows the flexibility to choose the types of courses/subjects want to study
- 9 Has relatively small class sizes (small number of students per class)
- 10 The number of tests required for each course is relatively few
- 11 Takes less time to complete the qualification you/ your children want
- 12 I have personal experience of the country
- 13 Easy to get information about studying in the country
- 14 My friends/family recommend it
- 15 School teachers / school advisors recommend it
- 16 Education agents recommend it
- 17 Easy to get a scholarship
- 18 Cost of education is not expensive
- 19 Cost of living is not expensive
- 20 Easy to be allowed in the country / get a visa
- 21 Academic requirements are not too strict
- 22 Easy to be accepted in educational institutions in the country
- 23 Easy to travel to/from Taiwan
- 24 Allowed to work part-time in the country while studying
- 25 Easy to be allowed to stay in the country after studying
- 26 Has a formal alumni network that allows you/ your children to easily maintain contact with fellow students
- 27 Country is safe / has little crime
- 28 Country is a good place to raise children/ Children will not learn bad behaviour or bad habits.
- 29 Country has a good climate / weather
- 30 Many Taiwanese people live or study there
- 31 Has strong standards for the care and protection of international students
- 32 People in the country are very accepting of people from other countries
- 33 Has friendly homestay families
- 34 Country has a wide range/diversity of people and cultures
- 35 Has a long history / culture
- 36 Has a lively, exciting lifestyle
- 37 Is a very convenient place to live
- 38 Country has a wide range of outdoor/adventure activities available
- 39 Easy to speak/understand the language
- 40 Is a country internationally recognised as being innovative
- 41 Is a technologically advanced country



Tertiary and language/vocational parents considered NZ as lower cost, safe, good place to raise children and good weather.

Country Perceptions – Tertiary, Language & Vocational Training Parents



- 18 Cost of education is not expensive
- 19 Cost of living is not expensive
- 27 Country is safe / has little crime
- 28 Country is a good place to raise children/ Children will not learn bad behaviour or bad habits.
- 29 Country has a good climate / weather
- 33 Has friendly homestay families

* Other attribute are less associated with NZ, and the detailed attributes names are listed in the previous slide.

* Red highlighted attributes are top important for parents.





For TLV parents, reputation, specialty and friends/family recommendation were the reasons for country preference.

Reasons for Preferring a Country – Tertiary, Language & Vocational Training (TLV) Parents

	Base	USA/ America	Australia	Canada	UK	New Zealand
✓ Education institutions have good reputation	44	70CE	55	43	80CE	35
✓ The country is recognised as one of the best places to study the subject you're/ your child is interested in	66		52	46	75CE	41
✓ Friends/family recommend it	59		58	64	50	59
✓ Qualifications are internationally recognised	57E		39	43	65E	29
✓ Easier to speak the language	48		39	32	50	24
✓ Yourself/friends/family live or study there/have lived or studied there	45		39	46	35	29
✓ People in the country are very accepting of people from other countries	34		32	36	20	35
✓ Many Taiwanese people live or study there	25		32	29	20	35
✓ Country is safe/has little crime	20		48AD	25	15	47AD
✓ Takes less time to complete the qualification	18		23	32	30	35
✓ Teachers/school advisors recommend it	18		10	11	35BCE	6
✓ Close to Taiwan	14		26	18	10	12
✓ Can work in the country after studying	14		16	25	10	12
✓ Easy to be accepted in educational institutions	11		23	29D	5	24
✓ Cost of education is affordable/not expensive	11		39AD	21	10	29
✓ Easy to be allowed in the country/get a visa	11		6	18	10	12
✓ Is a good place to raise children/Children will not learn bad behaviours or bad hobbies	9		45AD	25	10	47AD
✓ Cost of living is affordable/not expensive	9		23	18	5	12

*Only 5 main countries are shown

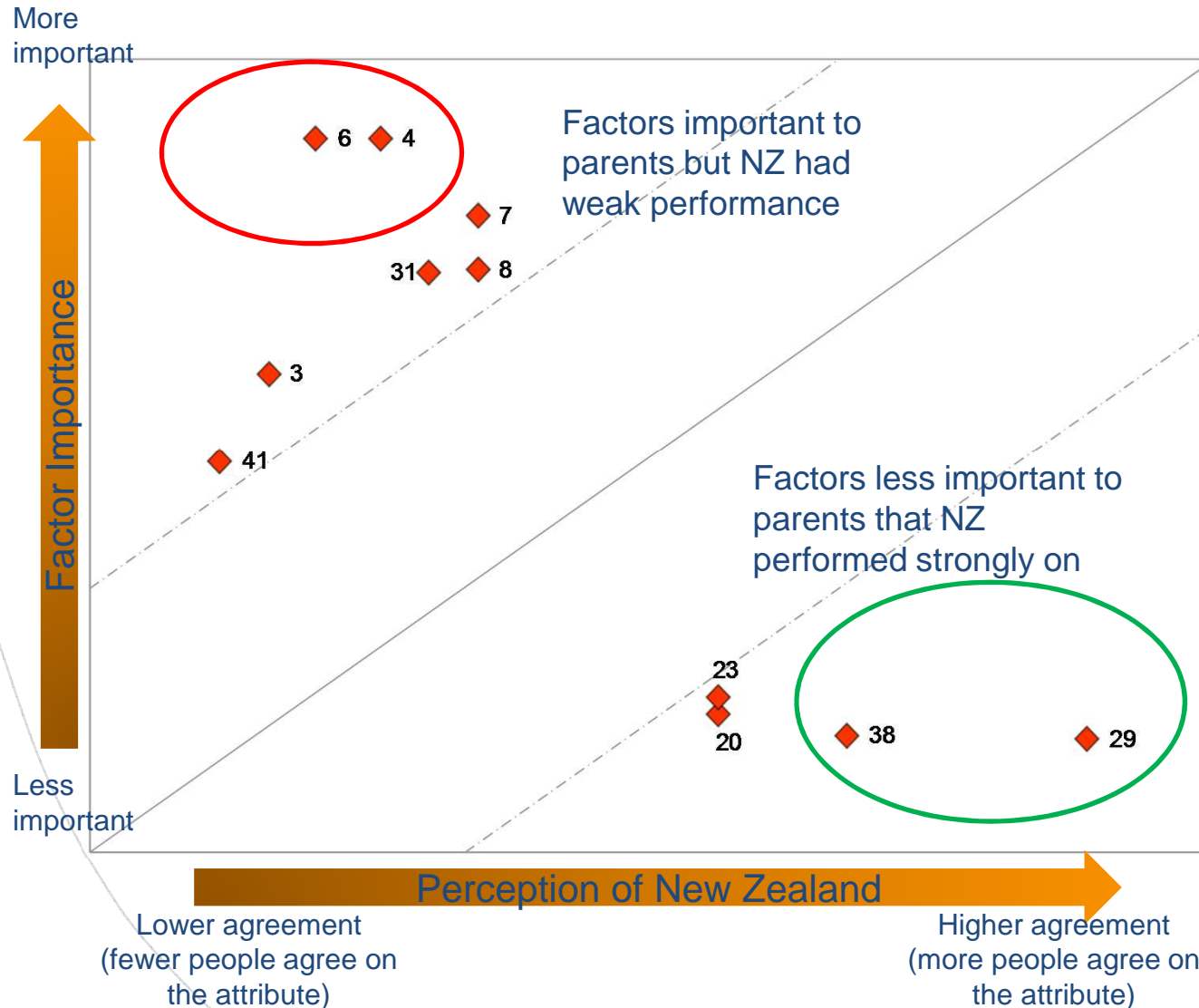
A/B/C/D denote significantly higher at 95% confidence level
 Figures highlighted by are the top reasons for the country

Base: All respondents
 Q6: What are the main reasons you are considering studying in [Preferred Country]?



Improving perceptions of NZ on the reputation of its *qualification* and *specialties* were also the needed changes for TLV parents.

Factor Importance vs. Perceptions of NZ – Tertiary, Language & Vocational Training (TLV) Parents



- 3 Has teachers / researchers who are highly regarded internationally
- 4 Qualifications are highly regarded internationally
- 6 The country is recognised as one of the best places to study the subject interested in
- 7 Education system encourages students to think for themselves (encourages independent thinking)
- 8 Allows the flexibility to choose the types of courses/subjects want to study
- 20 Easy to be allowed in the country /get a visa
- 23 Easy to travel to/from Taiwan
- 29 Country has a good climate / weather
- 31 Has strong standards for the care and protection of international students
- 38 Country has a wide range of outdoor/adventure activities available
- 41 Is a technologically advanced country

Key Findings

- Information Sources and Communication Perceptions**

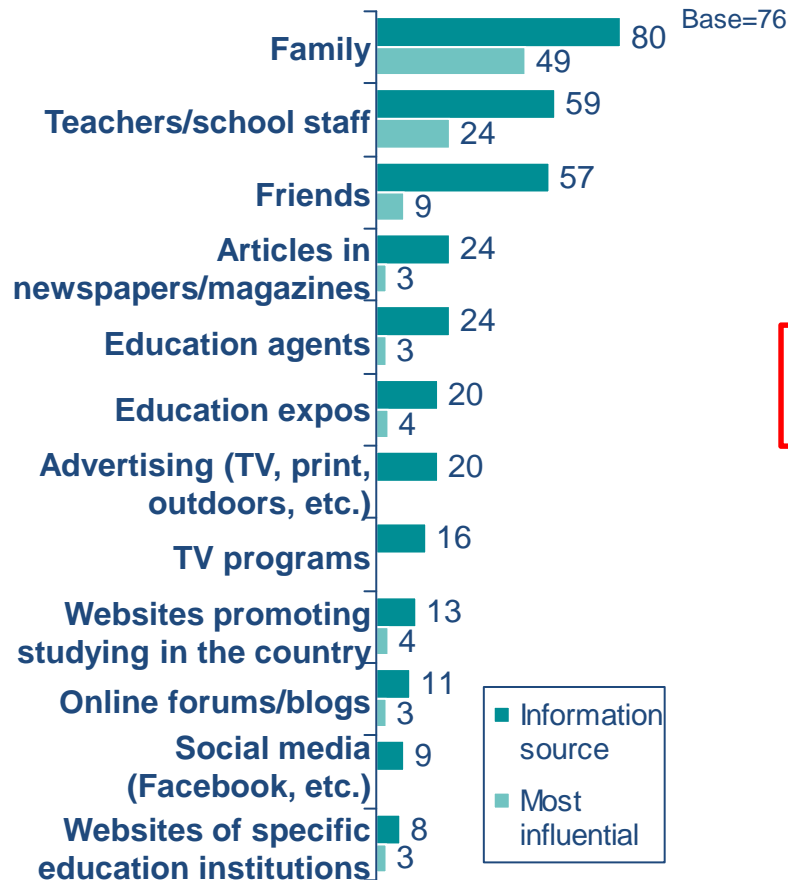
Potential students and Parents



Word-of-mouth was the main information source of TLV parents, mainly from family, friends, and school teachers.

Information Sources for Country Choice – Tertiary, Language & Vocational Training (TLV) Parents

Information Sources for Country Choice



Base: All respondent,
Q11: Now we would like to ask you about how you get information to help you choose a country to study in. Which of these sources have you already used to get information about countries you are considering studying in?
Q12: And which source has had the most influence on you so far in deciding which country to study in?

Websites Ever Visited



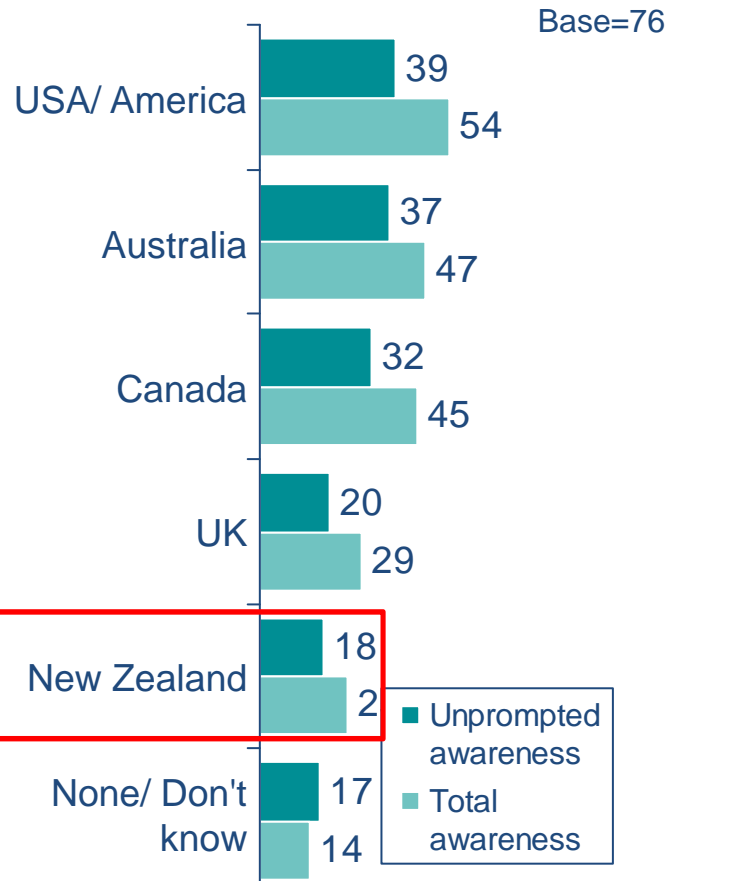
Base: All respondent,
Q11a: Have you ever visited any of these websites?



NZ had the lowest promotion awareness among key countries, and traditional media was the main sources of the advertising.

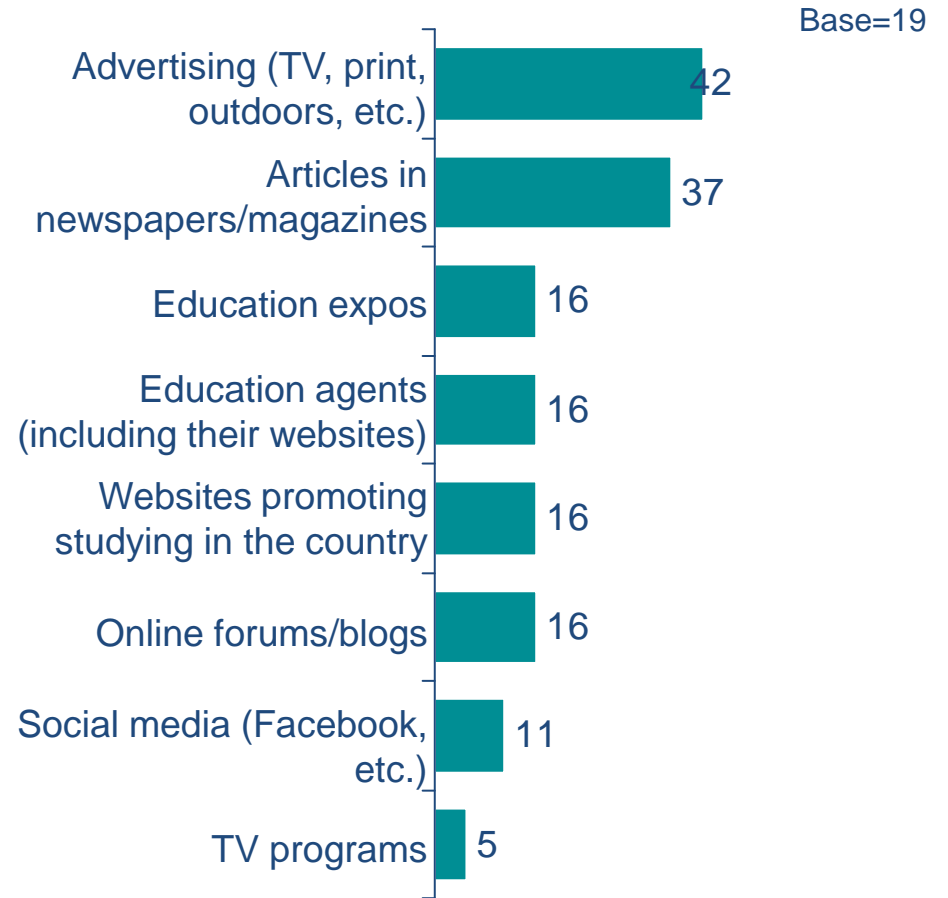
Awareness of Country-Specific Promotions and Sources of Awareness of NZ-Specific Advertising – Tertiary, Language & Vocational Training (TLV) Parents

Awareness of Country-Specific Promotions



Base: All respondent,
Q13: Have you seen or read any information or advertising promoting studying in a particular country? If yes, which countries were those?
Q14: And have you seen or read any information or advertising promoting studying in these countries?

Sources of Awareness of NZ-Specific Advertising



Base: Those who had ever seen NZ advertising,
Q15: Where have you seen or read information promoting studying in New Zealand?



Allowing part-time works and country/ school information were the key message take-out from the NZ advertising for TLV parents.

Information Received from New Zealand Advertising – Tertiary, Language & Vocational Training (TLV) Parents

	<i>Base</i>	<i>19</i>
✓ Instructions of schools/subjects		26
✓ Instructions of the culture/ environment of this country		26
✓ Beautiful natural scene		21
✓ Good environment for studying		21
✓ Cost of living/study is affordable/not expensive		16
✓ Allows work part-time		11
✓ Less crimes/safe		11
✓ Has small classes		5

Base:
Q16:

Those who had ever seen NZ advertising,
Thinking about all of the information you have seen or read promoting studying in New Zealand,
what messages or content do you most remember?

Appendix

- Detailed Results

Potential students and
Parents

Appendix

- Detailed Results of Factor Importance & Explanation of MaxDiff

Potential students and Parents



MaxDiff – Analysis Approach for Determining Importance of Factors Affecting Country Choice

- When identifying the importance of the various factors influencing country choice, we used a technique called Maximum Difference Scaling (MaxDiff). This approach ensures more differentiation between factor importance, compared with simple importance ratings, and is easier for respondents to do compared with ranking a long list of factors.
- Respondents were shown a series of choice sets (see example below), each set containing a different combination of factors. The series of sets and combination of factors was controlled by a rotation design. Respondents chose which factor was most important to them and which one was least important.

When considering different which country you might want to study in, among the five attributes shown here, which is the most and which is the least important to you?

Most Important		Least Important
<input checked="" type="checkbox"/>	Ease of getting a student visa	<input type="checkbox"/>
<input type="checkbox"/>	Friends / family living in the country	<input type="checkbox"/>
<input type="checkbox"/>	Have lived in the country / travelled there	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Availability of scholarships	<input type="checkbox"/>
<input type="checkbox"/>	Reputation of education institutions	<input type="checkbox"/>

- In analysis, an important score was then generated for each attribute. The important scores is a ratio-scaled rating, subsequently rescaled from 0 to 100, representing the probability of an item being selected.



Detailed Importance Scores of Each Attributes – Tertiary, Language Course & Vocational Training Parents

Most Important Factors

Less Important Factors

Least Important Factors

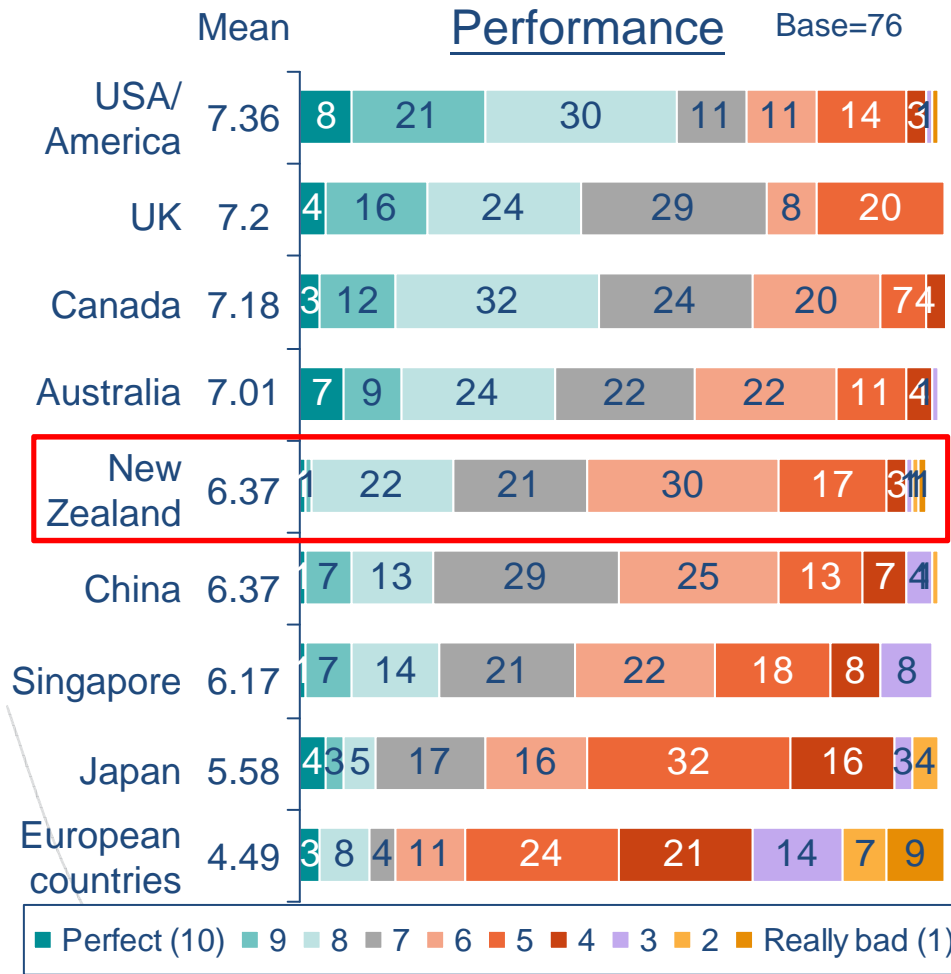
Rank	Attribute	Score	Rank	Attribute	Score	Rank	Attribute	Score
1	Qualifications are highly regarded internationally	5.42	10	Is a technologically advanced country	2.97	29	Allowed to work part-time in the country while studying	1.44
2	The country is recognised as one of the best places to study the subject interested in	5.42	11	Is a very convenient place to live	2.93	30	School teachers / school advisors recommend it	1.43
3	Education system encourages students to think for themselves (encourages independent thinking)	4.83	12	My friends/family recommend it	2.90	31	The number of tests required for each course is relatively few	1.40
4	Country is safe / has little crime	4.44	13	Cost of living is not expensive	2.75	32	Easy to travel to/from Taiwan	1.19
5	Allows the flexibility to choose the types of courses/subjects want to study	4.42	14	Easy to be accepted in educational institutions in the country	2.72	33	Education institutions are historic / have a long history	1.18
6	Has strong standards for the care and protection of international students	4.41	15	Education institutions are highly regarded internationally	2.68	34	Has a formal alumni network that allows you/ your children to easily maintain contact with fellow students	1.18
7	Easy to speak/understand the language	3.74	16	I have personal experience of the country	2.62	35	Has a long history / culture	1.08
8	People in the country are very accepting of people from other countries	3.68	17	Country is a good place to raise children/ Children will not learn bad behaviour or bad habits.	2.59	36	Easy to be allowed in the country / get a visa	1.06
9	Has teachers / researchers who are highly regarded internationally	3.64	18	Many Taiwanese people live or study there	2.55	37	Has relatively small class sizes (small number of students per class)	1.06
			19	Cost of education is not expensive	2.51	38	Famous/highly regarded people have studied in the country	1.06
			20	Has a lively, exciting lifestyle	2.43	39	Education agents recommend it	1.00
			21	Academic requirements are not too strict	2.31	40	Country has a wide range of outdoor/adventure activities available	0.90
			22	Takes less time to complete the qualification you/ your children want	2.27	41	Country has a good climate / weather	0.87
			23	Easy to be allowed to stay in the country after studying	2.08			
			24	Is a country internationally recognised as being innovative	1.94			
			25	Has friendly homestay families	1.85			
			26	Country has a wide range/diversity of people and cultures	1.82			
			27	Easy to get information about studying in the country	1.78			
			28	Easy to get a scholarship	1.46			

Appendix

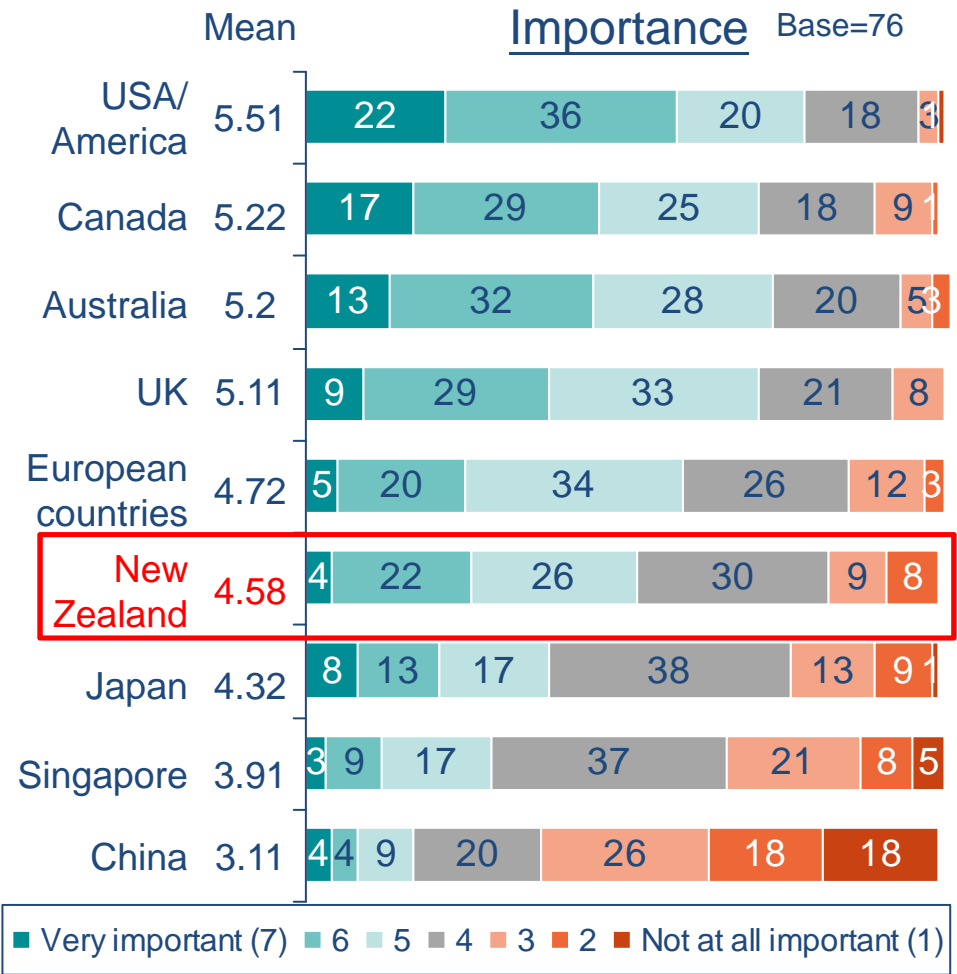
- Detailed Results of Country Importance and Country Performance

Potential students and Parents

Performance and Importance – Tertiary, Language Course & Vocational Training Parents by Country



Base: Q3: All Respondents
How would you rate each of the following countries in terms of your overall opinion of it as a place to study?



Base: Q4: All Respondents
How important is your relationship with each of the following countries to you in terms of being a place to study?

Appendix

- Detailed Results of Country Perceptions

Potential students and
Parents

Detailed Country Perceptions – Tertiary, Language course & Vocational training parents (attributes 1-15)

	NZ	UK	Canada	USA	Australia
Country has a good climate/weather	62	9 ▼	29 ▼	18 ▼	64
Country has a wide range of outdoor/adventure activities available	47	17 ▼	29 ▼	41	51
Easy to get information about studying in the country	41	39	51	72 ▲	49
Easy to be accepted in educational institutions in the country	41	8 ▼	30	37	46
Easy to be allowed in the country/get a visa	39	12 ▼	45	43	47
Easy to travel to/from Taiwan	39	20 ▼	34	41	47
Country is a good place to raise children/Children will not learn bad behaviour or bad hobbies	39	36	29	18 ▼	39
Cost of education is not expensive	37	4 ▼	14 ▼	4 ▼	30
Allowed to work part-time in the country while studying	37	18 ▼	29	42	62 ▲
Country is safe/has little crime	37	36	34	17 ▼	47
Cost of living is not expensive	36	1 ▼	16 ▼	4 ▼	25
Has friendly homestay families	36	16 ▼	30	25	32
Easy to speak/understand the language	36	45	41	72 ▲	34
Academic requirements are not too strict	34	5 ▼	25	29	33
Has a lively, exciting lifestyle	32	25	33	62 ▲	46

Base: All Tertiary, Language course & Vocational training parents, n=76
Q10: What countries can apply to the statement?
Significant notation: ▲/▼ denote significant higher/ lower than NZ at 95% confidence level.

Detailed Country Perceptions – Tertiary, Language course & Vocational training parents (attributes 16-30)

	NZ	UK	Canada	USA	Australia
People in the country are very accepting of people from other countries	29	25	29	59 ▲	41
Has relatively small class sizes (small number of students per class)	28	22	12 ▼	24	26
Has a formal alumni network that allows you/ your children to easily maintain contact with fellow students	26	36	37	54 ▲	24
Easy to get a scholarship	25	1 ▼	18	21	21
Many Taiwanese people live or study there	25	28	38	74 ▲	30
Education system encourages students to think for themselves (encourages independent thinking)	24	37	30	83 ▲	30
Allows you the flexibility to choose the types of courses/subjects you want to study	24	30	30	68 ▲	32
Takes less time to complete the qualification you/ your children want	24	21	18	28	32
Education agents recommend it	22	30	26	42 ▲	24
Has strong standards for the care and protection of international students	21	32	22	39 ▲	22
The number of tests required for each course is relatively few	20	13	21	21	30
Country has a wide range/diversity of people and cultures	20	34	33	74 ▲	32
Qualifications are highly regarded internationally	18	68 ▲	34 ▲	87 ▲	29
Easy to be allowed to stay in the country after studying	17	8	30	42 ▲	25
Is a very convenient place to live	17	37 ▲	38 ▲	66 ▲	28

Base: All Tertiary, Language course & Vocational training parents, n=76
Q10: What countries can apply to the statement?
Significant notation: ▲/▼ denote significant higher/ lower than NZ at 95% confidence level.

Detailed Country Perceptions – Tertiary, Language course & Vocational training parents (attributes 31-41)

	NZ	UK	Canada	USA	Australia
Is a country internationally recognised as being innovative	17	37 ▲	24	68 ▲	21
Has a long history/culture	16	67 ▲	24	66 ▲	20
Education institutions are highly regarded internationally	14	62 ▲	28 ▲	83 ▲	21
The country is recognised as one of the best places to study the subject you're interested in	14	36 ▲	25	64 ▲	18
My friends/family recommend it	14	29 ▲	29 ▲	55 ▲	34 ▲
Famous/highly regarded people have studied in the country	13	64 ▲	25	80 ▲	13
My teachers/school advisors recommend it	13	34 ▲	22	50 ▲	18
Has teachers/researchers who are highly regarded internationally	11	63 ▲	25 ▲	82 ▲	11
I have personal experience of the country (visited/lived there before, or have friends or family who have lived or studied there)	9	13	30 ▲	45 ▲	24 ▲
Is a technologically advanced country	8	49 ▲	30 ▲	93 ▲	20 ▲
Education institutions are historic/have a long history	5	62 ▲	18 ▲	79 ▲	12

Base: All Tertiary, Language course & Vocational training parents, n=76
Q10: What countries can apply to the statement?
Significant notation: ▲/▼ denote significant higher/ lower than NZ at 95% confidence level.

Appendix - Questionnaires

Questionnaire: Potential Students



Microsoft Office
Word 2010

Questionnaire: Parents of Potential Students



Microsoft Office
Word 2010

Questionnaire: Education Agents



Microsoft Office
Word 2010

Thank you!