



Ipsos Marketing

Improving Marketing Effectiveness by Better Understanding Perceptions and Needs of Taiwanese Potential Students, Parents, and Education Agents

Results of Education Agents

Prepared for: Education New Zealand



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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.
 - ⇒ Although agents claimed they would recommend NZ at least as much as other countries (except for tertiary study), this did not influence students and parents generally, as shown in their low consideration of NZ. This suggests that focusing on agents is not sufficient to grow interest in studying in NZ among students and parents.
- Possibly due to their familiarity and experience, agents rated NZ and key competing countries as performing similarly well, except for secondary schools, where NZ was marginally better perceived. Nonetheless, NZ's favourable perception among agents did not translate into good perceptions in students and parents' minds.
- 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 recommendation for agents are the *reputation of education institutions and student's safety*.
 - ⇒ Among agents' most important factors for country recommendation, NZ performed best in being considered as *a good place to raise children, lower costs*, as well as being *safe*. However, NZ education institutions were less well regarded compared with those of other countries.
 - ⇒ In general, the key reasons for agents to recommend NZ were its *safe/less crime environment*, and the *lower costs of living/ study*, which was consistent with students and parents' perceptions of NZ's strengths.
- In agents' perception, NZ was seen most strongly as being *friendly, safe, and good for raising children*, as well as *lower cost*, in line with the perceptions of students and parents.
- 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.

Executive Summary (3) – Marketing & Communication

- Half of agents rated NZ's marketing communication positively, but not as good as Australia and UK. More media exposure may be required, especially given the lack of familiarity of NZ as a study place among parents and students.
- Provide full lists of education institutions/ranking of education institution/specialty of education institution is the key suggestions on how ENZ could improve service/support to agents.
- Suggestions on how NZ education institution can improve promoting themselves include:
 - ⇒ Provide full list of education institutions/ranking of education institution/specialty of education institution.
 - ⇒ More flexibility for apply admissions/allow conditional admission

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 Education Agents



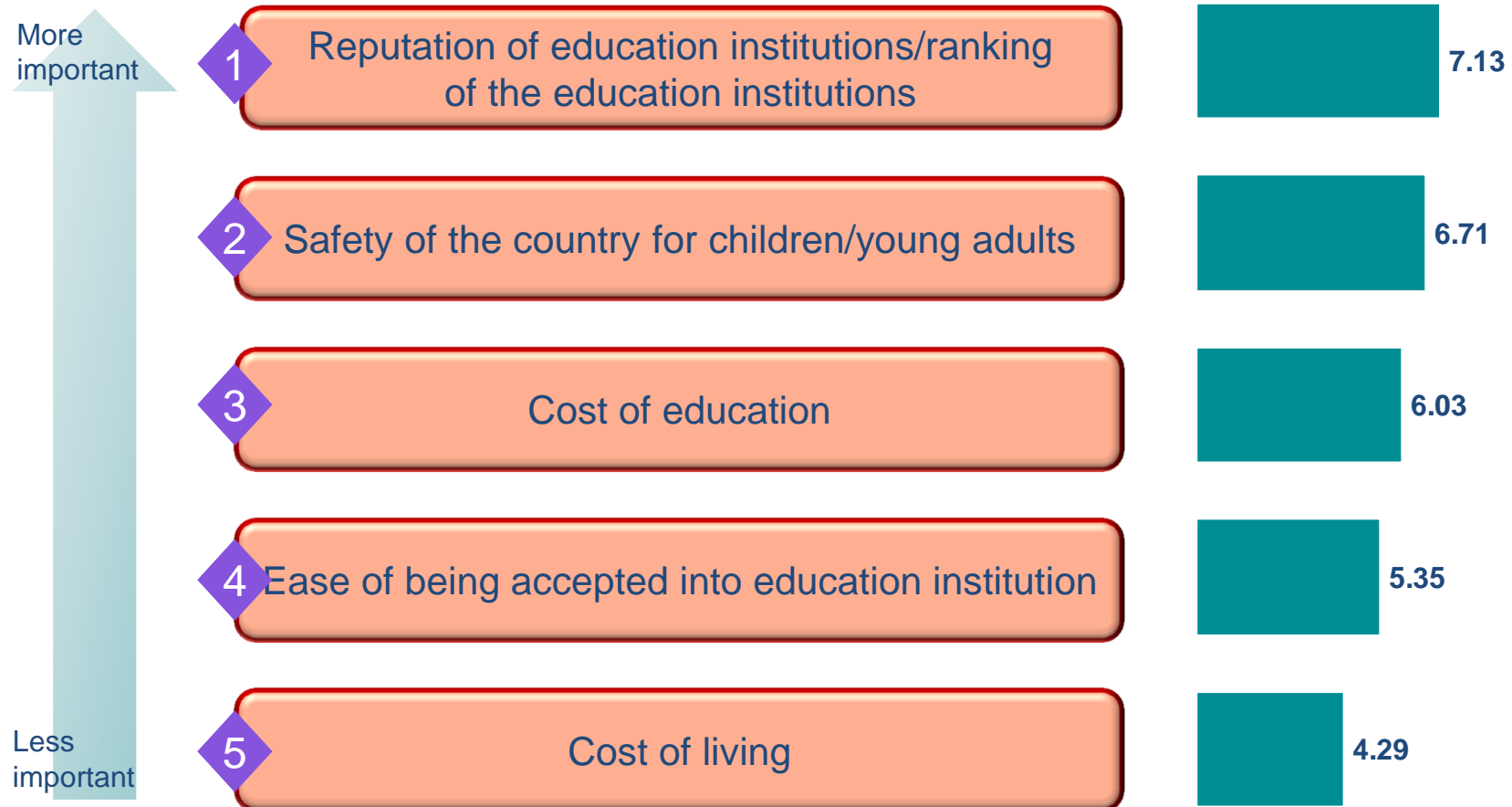
Key Findings

- Importance of Factors
in Country
Recommendation**

Education Agents

Similar with students and parents, *reputation* was the most important driver of country recommendation among agents, followed closely by *students' safety*.

Top 5 Important Factors When recommending A Country to Study In



Among 16 factors, respondents selected 10 important ones and ranked them from 1 to 10 in order of importance. In calculating importance, we assign 10 points if the factor was ranked 1st, 9 points if ranked 2nd, etc. For the factors that had not been chosen as top 10, we assigned 0 point to them.

Although agents did not consider *country awareness* an important factor (ranked 9 out of 16), the lack of familiarity was NZ's key disadvantage among students and parents, leading to a low level of consideration of NZ. Increasing awareness and familiarity of NZ is thus still important.

Less Important Factors When Recommending a Country to Study in



Among 16 factors, respondents selected 10 important ones and ranked them from 1 to 10 in order of importance. In calculating importance, we assigned 10 points if the factor was ranked 1st, 9 points if ranked 2nd, etc. For factors that were not chosen in the top 10, we assigned 0 point.

Key Findings

- Country Preference, Evaluation, and Perceptions**

Education Agents

Key Findings

- Country Preference

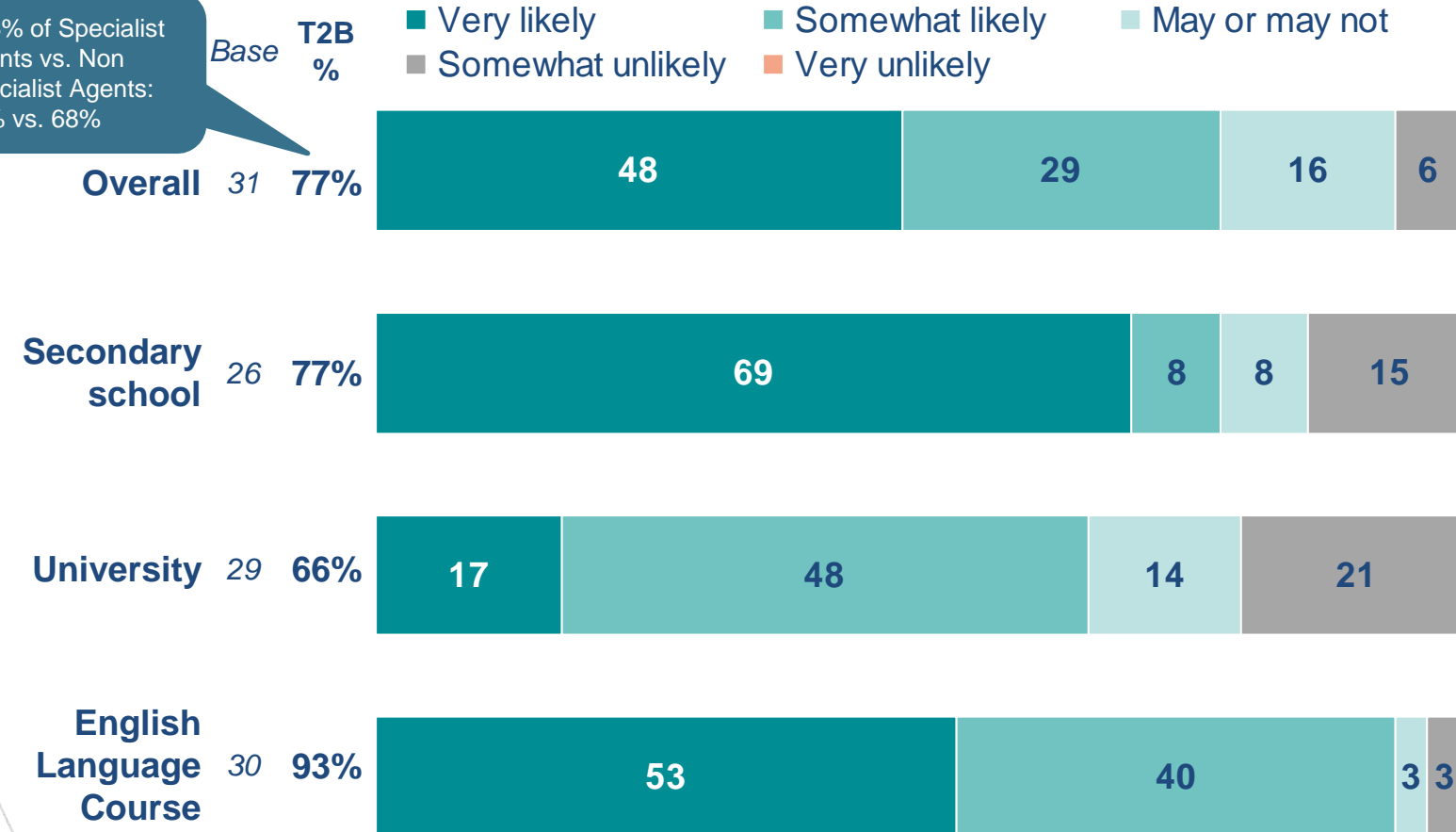
Education Agents



Apart from tertiary study, agents were very positive in their willingness to recommend NZ as a place to study. However, this strong support has not translated into high levels of consideration of NZ among students and parents, as shown in roughly 40% of students and parents being unlikely to consider studying in NZ.

Likelihood of Recommending NZ

T2B% of Specialist Agents vs. Non Specialist Agents: 92% vs. 68%



Base: All Respondents, n=31
Q10: Overall how likely would you be to recommend New Zealand?
Base: Those whose customers study for secondary school, n=26
Q11: For secondary school, how likely would you be to recommend New Zealand?
Base: Those whose customers study for university school, n=29
Q12: For university, how likely would you be to recommend New Zealand?
Base: Those whose customers study for English language school, n=30
Q13: For English language school, how likely would you be to recommend New Zealand?

Overall, very few agents claimed they would not recommend NZ, apart from tertiary study. Barriers contributing to low willingness to recommend NZ were typically related to a *lack of familiarity*.

Reasons for Not Recommending NZ

Overall (n=2)

- Fewer schools to choose from/fewer top schools
- Not easy to apply the admission nor easy to graduate
- Not familiar with the schools/environment/education system in New Zealand

University (n=6)

- Not familiar with the schools/environment/education system in New Zealand
- Fewer schools to choose from/fewer top schools
- Not good at technology/art/commercial related subjects
- The students are less willing to study in the country that have no friends/relatives live there

Secondary school(n=4)

- Fewer schools to choose from/fewer top schools
- Very few education institutions come to promote themselves
- Not familiar with the schools/environment/education system in New Zealand
- Our company focus on recommending to other countries
- Not convenient to live

Language course (n=1)

- Doesn't like the accent in New Zealand
- There are not enough attractive tourism attractions

Base:

Those who not recommend NZ as a place to study- overall, n=2

Q18:

For what reasons would you not likely to recommend New Zealand as a place to study overall?

Base:

Those who not recommend NZ as a place to study- Secondary school, n=4

Q19:

For what reasons would you not likely to recommend New Zealand as a place to go to secondary school in?

Base:

Those who not recommend NZ as a place to study- University, n=6

Q20:

For what reasons would you not likely to recommend New Zealand as a place to study to go to university in?

Base:

Those who not recommend NZ as a place to study- English language school, n=1

Q21:

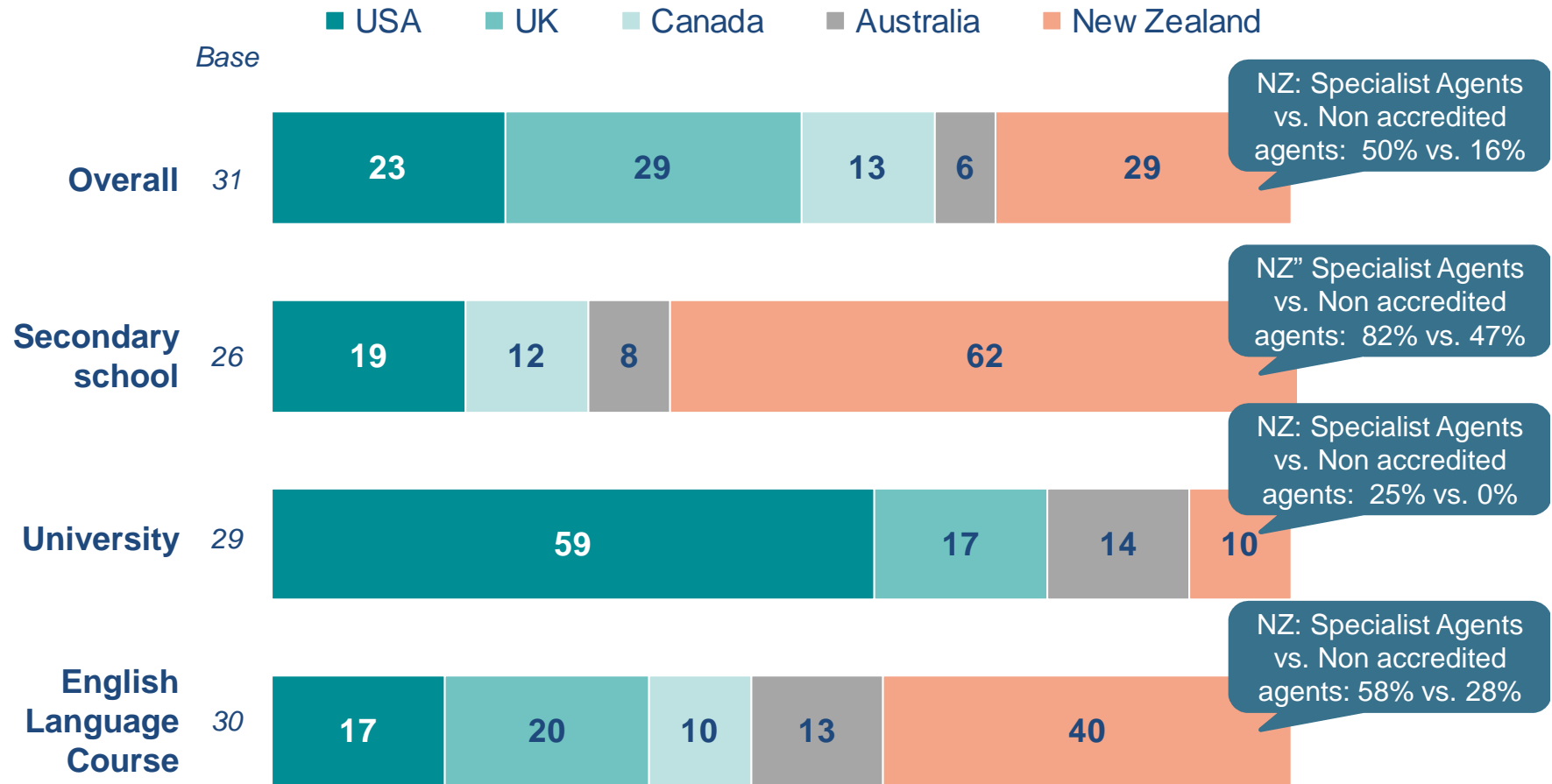
For what reasons would you not likely to recommend New Zealand as a place to study English in?



Although agents claimed they would recommend NZ at least as much as other countries (except for tertiary study), this did not influence students and parents generally, as shown in their low consideration of NZ. This suggests that focusing on agents is not sufficient to grow interest in studying in NZ among students and parents.

Education Agents

Countries Would Recommend



Base: All respondents, n=31
Q1: Which country would you overall be most likely to recommend as a place to study?
Base: Those whose customers study for secondary school, n=26
Q2: Which country would you be most likely to recommend as a place to study in the secondary school?
Base: Those whose customers study for university, n=29
Q3: Which country would you be most likely to recommend as a place to study in the university?
Base: Those whose customers study for English language school, n=30
Q4: Which country would you be most likely to recommend as a place to study in the English language school?

Key Findings

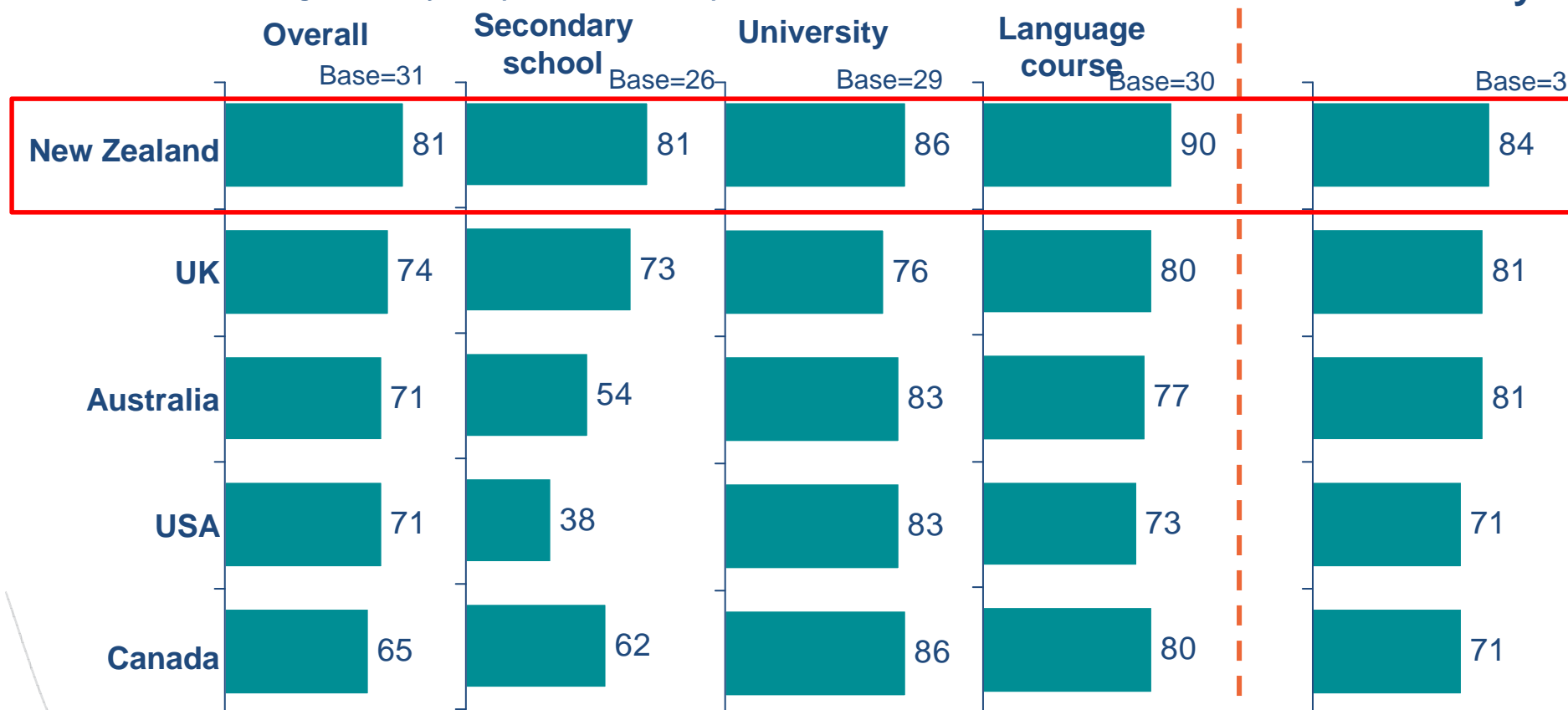
- Country Evaluation

Education Agents

Possibly due to their familiarity and experience, agents rated NZ and key competing countries as performing similarly well, except for secondary schools, where NZ was marginally better perceived. Nonetheless, NZ's favourable perception among agents did not translate into good perceptions in students and parents' minds.

Performance as a Place to Study

% rating the country 7~10 points based on 10-point scale.



Importance as a Place to Study

Base=31

% rating the country 5~7 points based on 7-point scale.

Base:

Q5: All Respondents, n=31

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

Base: Those whose customers study for secondary school, n=26

Q6: How would you rate each country as a place to go to secondary school in ?

Base: Those whose customers study for university school, n=29

Q7: How would you rate each country as a place to go to university in?

Base: Those whose customers study for English language school, n=30

Q8: How would you rate each country as a place to study English in, that is, go to an English language school?

Base: All Respondents, n=31

Q9: How important is your connection or relationship with each of these countries to you in terms of being a place to study?

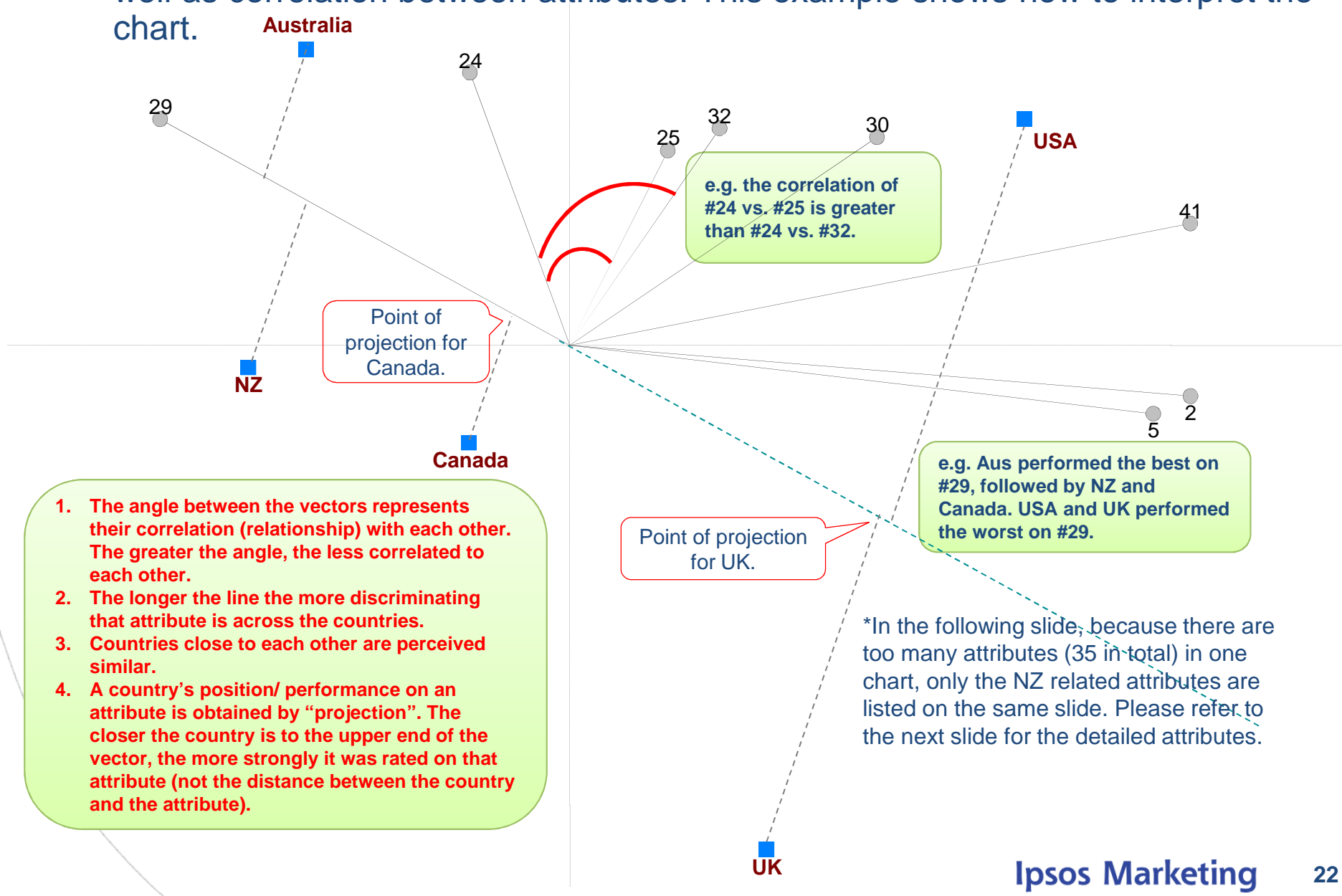
Key Findings

- Country Perceptions

Education Agents

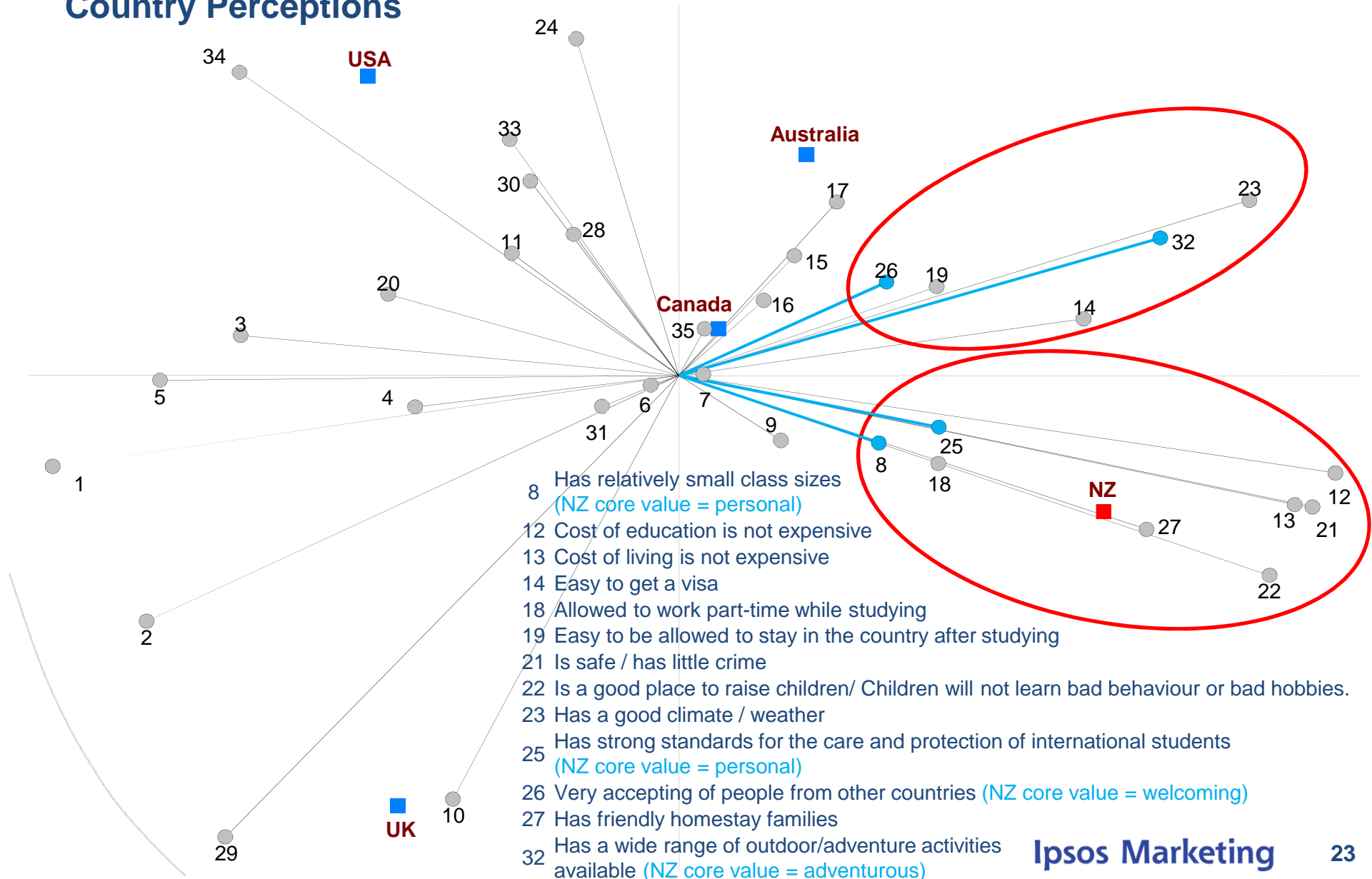
Country Perceptions and Performance

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



In agents' perception, NZ was seen most strongly as being *friendly, safe, and good for raising children*, as well as *lower cost*, in line with the perceptions of students and parents.

Country Perceptions



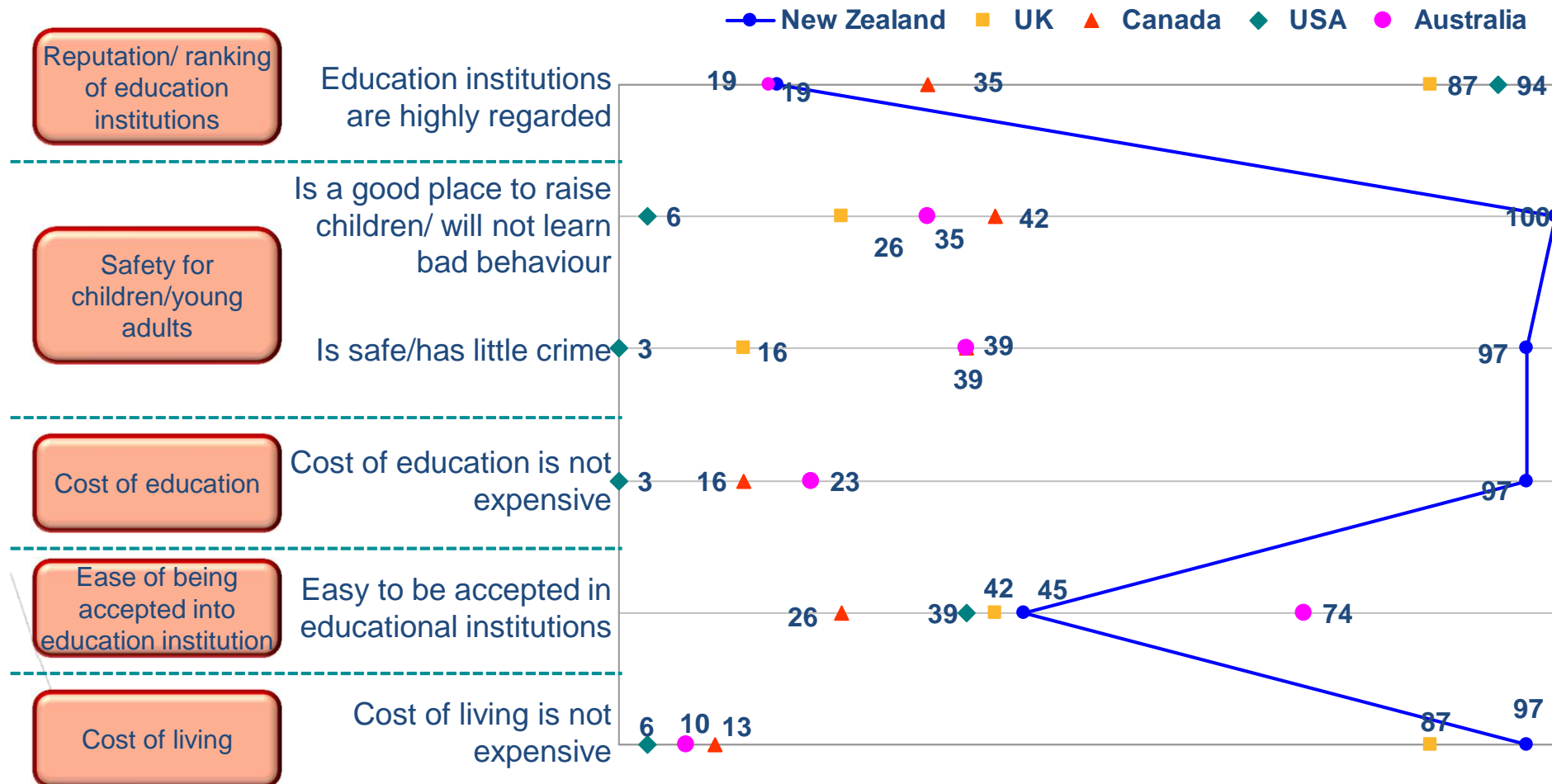
Detailed attributes of country perceptions

- 1 Education institutions are highly regarded internationally
- 2 Education institutions 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 here
- 6 Education system encourages independent thinking
- 7 Allows students the flexibility to choose the types of courses/subjects they want to study
- 8 Has relatively small class sizes
- 9 Number of tests required for each course is relatively few
- 10 Takes less time to complete the desired qualification
- 11 Easy to get a scholarship
- 12 Cost of education is not expensive
- 13 Cost of living is not expensive
- 14 Easy to get a visa
- 15 Academic requirements are not too strict
- 16 Easy to be accepted in educational institutions
- 17 Easy to travel to/from Taiwan
- 18 Allowed to work part-time while studying
- 19 Easy to be allowed to stay in the country after studying
- 20 Has a formal alumni network that allows students to easily maintain contact with fellow students
- 21 Is safe / has little crime
- 22 Is a good place to raise children/ Children will not learn bad behaviour or bad hobbies.
- 23 Has a good climate / weather
- 24 Many Taiwanese people live or study here
- 25 Has strong standards for the care and protection of international students
- 26 Very accepting of people from other countries
- 27 Has friendly homestay families
- 28 Has a wide range/diversity of people and cultures
- 29 Has a long history / culture
- 30 Has a lively, interesting lifestyle
- 31 Is a very convenient place to live
- 32 Has a wide range of outdoor/adventure activities available
- 33 The country is internationally recognised as being innovative
- 34 Is a technologically advanced country
- 35 Education institutions pay a higher level of commission



Among agents' most important factors for country recommendation, NZ performed best in being considered as *a good place to raise children, lower costs*, as well as being safe. However, NZ education institutions were less well regarded compared with those of other countries.

Country Perceptions on Most Important Factors



*Sort by factor importance

Base:
Q23:

All respondents, n=31
What countries can apply to the statement?

NZ's “simple” environment and affordable costs were the main reasons for agents to recommend it overall as a place of study.

Reason for Recommending a Country – Overall

	Total	New Zealand	UK	USA/ America	Canada	Australia
Base	31	9	9	7	4	2
	%	%	%	%	%	%
Environments	77	89	78	71	75	50
✓ Simple/safe environment/less crimes and temptations	32	56	22	-	75	-
✓ Is a good place for learning the language/'pure' English	13	11	33	-	-	-
✓ Can travel to other countries at the same time when studying in this country	10	-	33	-	-	-
✓ Taiwan students are familiar with this country/its culture	10	-	-	29	-	50
✓ Has much information (to consult)	10	11	-	29	-	-
✓ Easy to get visa/visa-waiver for 6 months	10	22	11	-	-	-
Education institutions/Qualifications	55	22	78	71	50	50
✓ Has many schools to choose from	19	-	22	43	25	-
✓ Takes less time to complete the qualification	10	-	33	-	-	-
Others	42	33	22	57	50	100
✓ (Agent) has personal experience in this country/had lived or studied in this country	16	22	22	-	25	-
✓ Many Taiwan student study in this country	13	-	-	43	-	50
✓ Has signed contracts with the schools/has good relationship with the schools/our company focuses on sending students to this country	10	-	-	14	-	100
Cost	26	67	11	-	25	-
✓ Cost of living/study is affordable/not expensive	26	67	11	-	25	-

Base:
Q14:

All respondents, n=31
What are the main reasons that you would be most likely to recommend [Q1 answer] overall as place to study in?

Only total >10% are shown

The perceived *simple environment* of NZ was the main driver for agents to recommend it as a place for secondary schooling.

Reason for Recommending a Country – Secondary School

	<u>Total</u>	<u>New Zealand</u>	<u>USA/ America</u>	<u>Canada</u>	<u>Australia</u>
<i>Base</i>	26	16	5	3	2
	%	%	%	%	%
Environments	73	88	60	67	-
✓ Simple/safe environment/less crimes and temptations	50	69	-	67	-
✓ Is a good place for learning the language/'pure' English	12	12	20	-	-
Education institutions/Qualifications	73	75	80	67	50
✓ Has good quality of course	23	31	-	33	-
✓ Education institutions take good care of students/are willing to solve students' problems	15	12	20	33	-
✓ Teaching style is more flexible/has more diversity	12	19	-	-	-
Cost	27	44	-	-	-
✓ Cost of living/study is affordable/not expensive	27	44	-	-	-

Base:
Q15:

Those whose customers study for secondary school, n=26
What are the main reasons that you would be most likely to recommend [Q2 answer] to go to secondary school in??

Only total >10% are shown

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Fewer agents recommended NZ as a place for tertiary study. USA was more commonly recommended, due to having more schools to choose from.

Reason for Recommending a Country – University

	<u>Total</u>	<u>USA/ America</u>	<u>UK</u>	<u>Australia</u>	<u>New Zealand</u>
<i>Base</i>	29	17	5	4	3
	%	%	%	%	%
Education institutions/Qualifications	90	88	100	75	100
✓ Has many schools to choose from	52	59	40	50	33
✓ Education institutions have high reputation/are well-known/have top ranking	24	18	20	50	33
✓ Has many subjects/courses to choose from	14	24	-	-	-
✓ Is less struck for applying admissions	14	18	-	25	-
Others	17	24	-	25	-
✓ Many Taiwan student study in this country	14	24	-	-	-

Base:
Q16:

Those whose customers study for university, n=29
What are the main reasons that you would be most likely to recommend [Q3 answer] to go to university in??

Only total >14% are shown

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For language courses, cost becomes a more relevant factor for agents when recommending.

Reason for Recommending a Country – Language Course

	<u>Total</u>	<u>New Zealand</u>	<u>UK</u>	<u>USA/ America</u>	<u>Australia</u>	<u>Canada</u>
Base	30	12	6	5	4	3
	%	%	%	%	%	%
Environments	73	67	100	80	50	67
✓ Simple/safe environment/less crimes and temptations	20	42	-	-	-	33
✓ Can travel to other countries at the same time when studying in this country	17	8	50	20	-	-
✓ Is a good place for learning the language/'pure' English	17	8	67	-	-	-
✓ Taiwan students are familiar with this country/its culture	10	-	-	40	25	-
✓ Easy to get visa/visa-waiver for 6 months	10	8	33	-	-	-
Cost	33	58	17	-	50	-
✓ Cost of living/study is affordable/not expensive	27	58	-	-	25	-
Education institutions/Qualifications	23	25	33	20	-	33
✓ Has good quality of course	10	8	33	-	-	-

Base:
Q17:

Those whose customers study for English language school, n=30
What are the main reasons that you would be most likely to recommend [Q3 answer] to go to English language school in??

Only total >10% are shown

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In general, the key reasons for agents to recommend NZ were its *safe/ less crime environment*, and the *lower costs of living/ study*, which was consistent with students and parents' perceptions of NZ's strengths.

Summary of NZ – Reasons for Recommending New Zealand to Study In

	Overall	Secondary school	University	Language school		Overall	Secondary school	University	Language school
Base	9	16	3	12	Base	9	16	3	12
<u>Environments</u>	89%	88%	67%	67%	<u>Others</u>	33%	6%	-	8%
Simple/safe environment/less crimes and temptations	56%	69%	-	42%	The students have friends/relatives in this country	22%	6%	-	8%
Easy to get visa/visa-waiver for 6 months	22%	-	-	8%	(Agent) has personal experience in this country/had lived or studied in this country	22%	-	-	8%
Homestay families are friendly	22%	12%	-	-	<u>Education institutions/Qualifications</u>	22%	75%	100%	25%
Has less race discrimination/is friendly to international students	11%	12%	-	8%	Has many good teachers	11%	6%	-	-
Has much information (to consult)	11%	-	-	8%	Has better education system	11%	6%	-	-
Is a good place for learning the language/'pure' English	11%	12%	-	8%	Education institutions take good care of students/are willing to solve students problems	11%	12%	33%	17%
Easy to find jobs after completing qualification	-	-	33%	-	Has good quality of course	-	31%	-	8%
Has more competitiveness	-	-	33%	-	Teaching style is more flexible/has more diversity	-	19%	33%	-
<u>Cost</u>	67%	44%	33%	58%	Education institutions have high reputation/are well-known/have top ranking	-	-	33%	-
Cost of living/study is affordable/not expensive	67%	44%	33%	58%	Has many schools to choose from	-	-	33%	-
					Less stress	-	-	33%	-

Only >10% shown

Base:
Q14-Q17:

Those who recommending NZ as a place to study
What are the main reasons that you would be most likely to recommend NZ as place to study in?

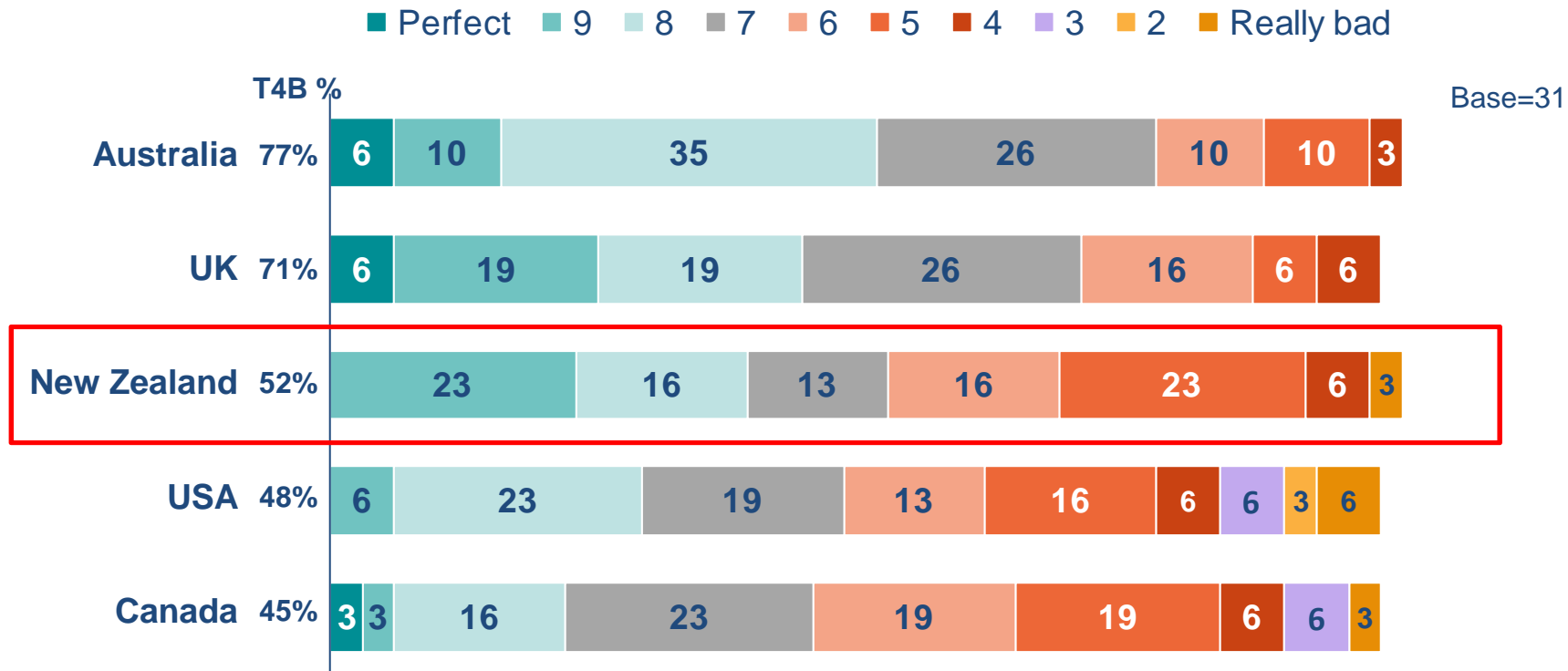
Key Findings

- Marketing Communications and Support to Agents

Education Agents

Half of agents rated NZ's marketing communication positively, but not as good as Australia and UK. More media exposure may be required, especially given the lack of familiarity of NZ as a study place among parents and students.

Marketing and Communication Performance



Reasons for giving poor rating for NZ - marketing/communication (n=3)

- Fewer education institutions come to the educational expo
- There is no official organisation to promote studying in New Zealand in Taiwan
- Has less advertising, e.g. little media exposure and few bus/MRT ads

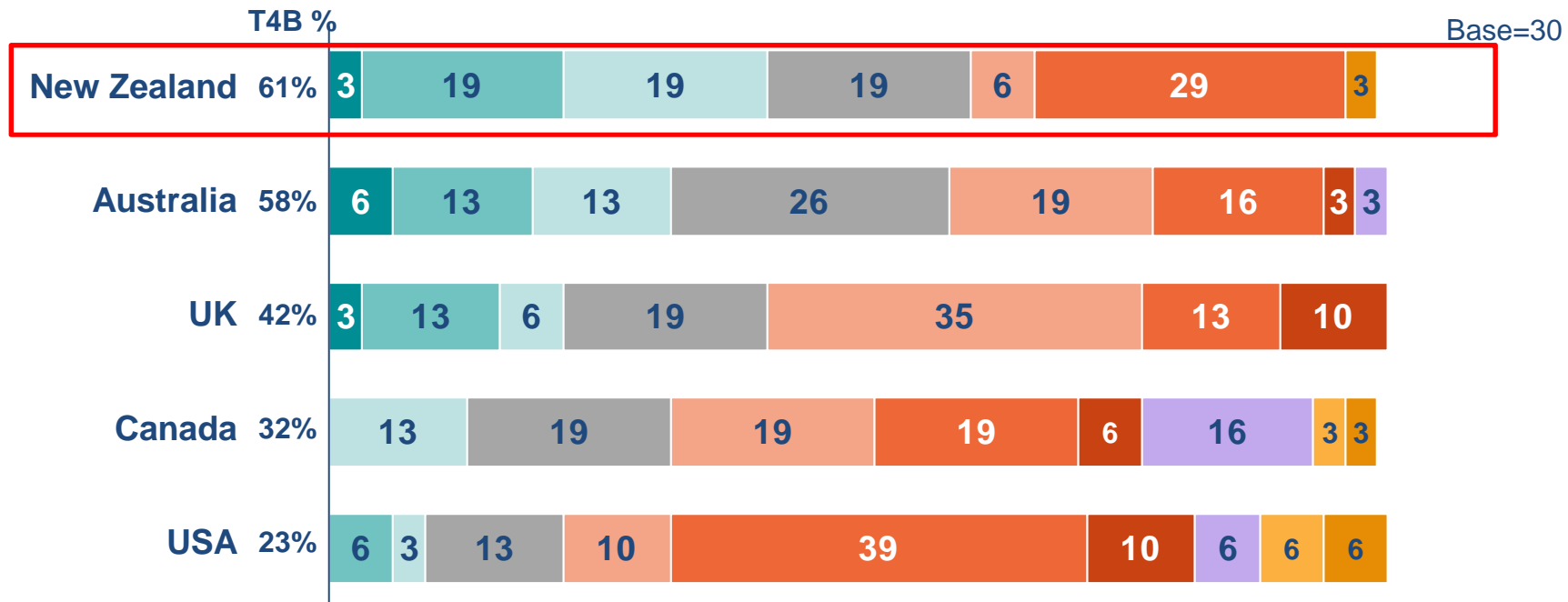
Base:
Q24:

All Respondents, n=31
How would you rate each of the following countries in terms of their marketing and communications, in terms of encouraging people to want to study there??

Among the 5 countries, ENZ performed on par with Australia and better than other countries' organisations in the support provided.

Performance of Support Provided by Official Country Organisations

Perfect 9 8 7 6 5 4 3 2 Really bad

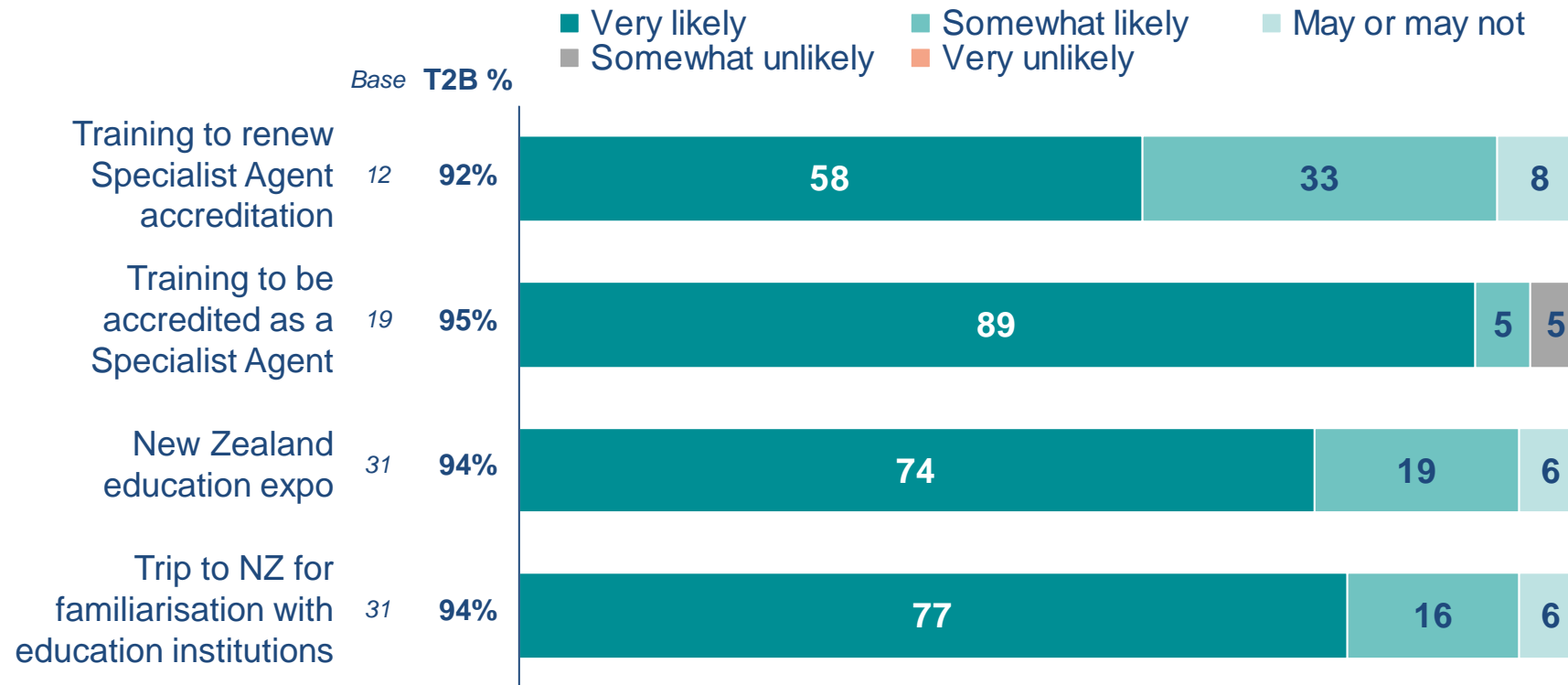


Reasons for giving poor rating for NZ - support from official organisations (n=1)

- Does not provide training or free trips to New Zealand for visiting education institutions

Interest in participating in ENZ-organised activities was very high.

Possibility to Participate the Activities Hold by ENZ



Reasons for not wanting to participate in Specialist Agent training (n=1)

- I am so familiar with New Zealand that I don't need such training

Key Findings

- Suggestions to ENZ and Education Institutions in NZ**

Education Agents

Suggestions for How ENZ Could Improve Service/ Support to Agents

<u>Interaction with agent</u>	<u>45%</u>
Arrange education institutions to visit agents by ENZ and avoid visiting individually at different time/increase meeting time with agents	16%
Hold agent seminar to introduce New Zealand education institutions/education system	10%
Improve the interaction with agents/visit agents more frequently	10%
<u>Promotion/Marketing</u>	<u>42%</u>
Apart from the natural scenes, introduce more New Zealand culture/schools/advantages	16%
Increase more ads/posters/promotion DVD	13%
Hold regular activities	10%
<u>Information</u>	<u>35%</u>
Provide full lists of education institutions/ranking of education institution/specialty of education institution	26%
Provide more information and comparison with Taiwan about living/economy situation, etc	13%
Introduction of the education system in New Zealand	10%
<u>Visa related</u>	<u>16%</u>
<u>Others</u>	<u>16%</u>

Only >10% shown

Base:
Q30:

All respondents, n=31
Do you have any suggestions regarding how Education New Zealand could improve how it promotes New Zealand, or its services and support to you?

Suggestions for How NZ Education Institutions Could Improve Promoting Themselves

<u>Applying education institution</u>	<u>32%</u>
More flexibility for apply admissions/allow conditional admission	19%
Has one single window to deal with applications	6%
<u>Promotion/Marketing</u>	<u>29%</u>
Produce instruction DVD/DVD which introduces school life in New Zealand by students from Taiwan	13%
Ask support from education institution to promote/participate education expo	6%
Increase the exposure of New Zealand education institution	6%
<u>Others</u>	<u>26%</u>
Provide 24hr customer service/reply agents' questions prompted	10%
Lower cost/allow working part-time	6%
<u>Information</u>	<u>23%</u>
Provide full list of education institutions/ranking of education institution/specialty of education institution	19%
Provide information regarding the proportion of international students in the education institution	6%
<u>Interaction with agent</u>	<u>10%</u>
Arrange more education institution to visit the agents/increase more meeting time with agents	10%
<u>None</u>	<u>13%</u>

Only >6% shown

Base:
Q31:

All respondents, n=31
Do you have any suggestions regarding how individual education institutions in New Zealand could improve how they promote themselves to agents, parents, or students??

Appendix

- Detailed Results

Education Agents

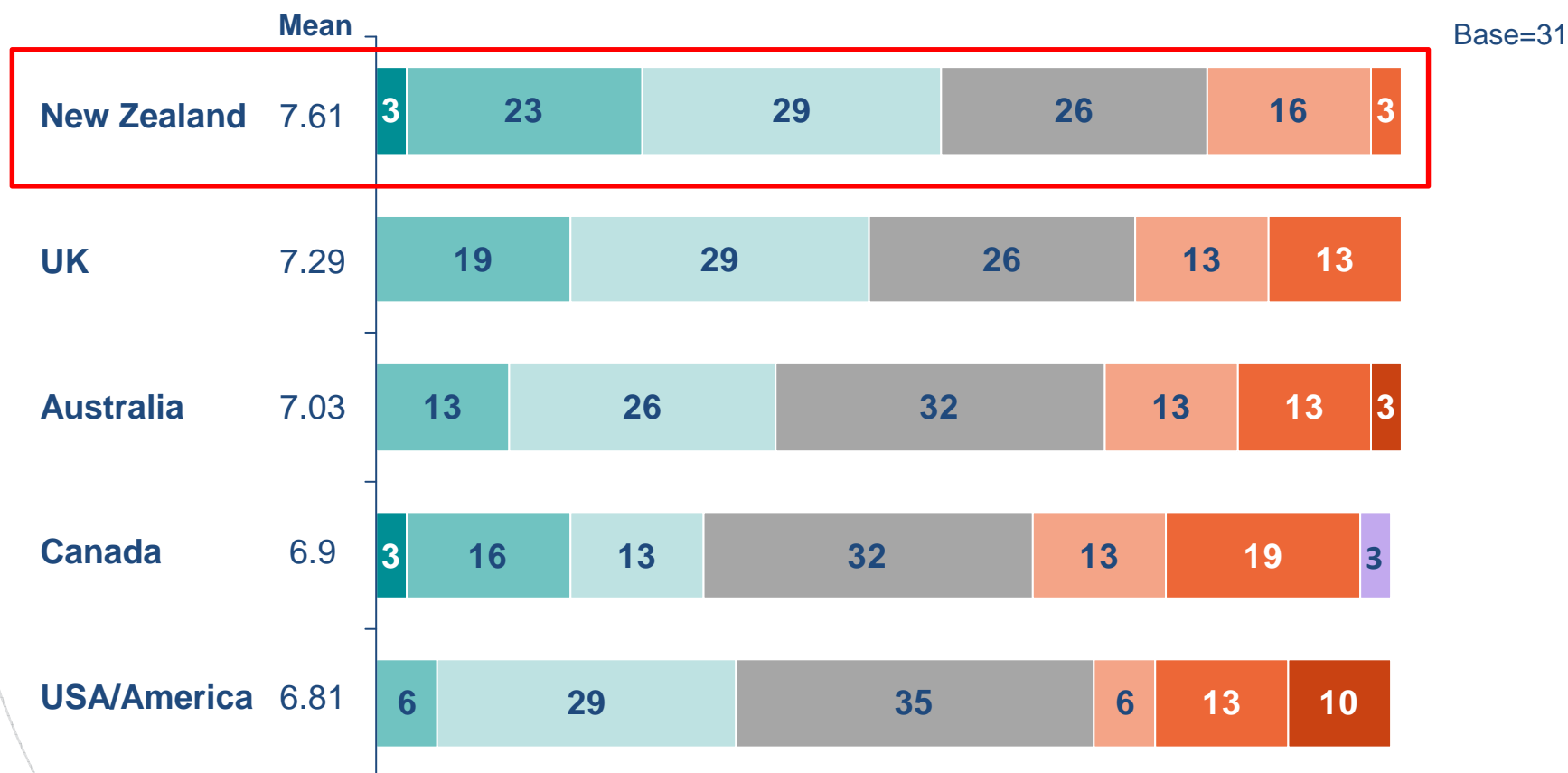
Appendix

- Detailed Results of Country Performance and Importance

Education Agents

Detailed Results of Performance as a Place to Study – Overall

Perfect 9 8 7 6 5 4 3 2 Really bad

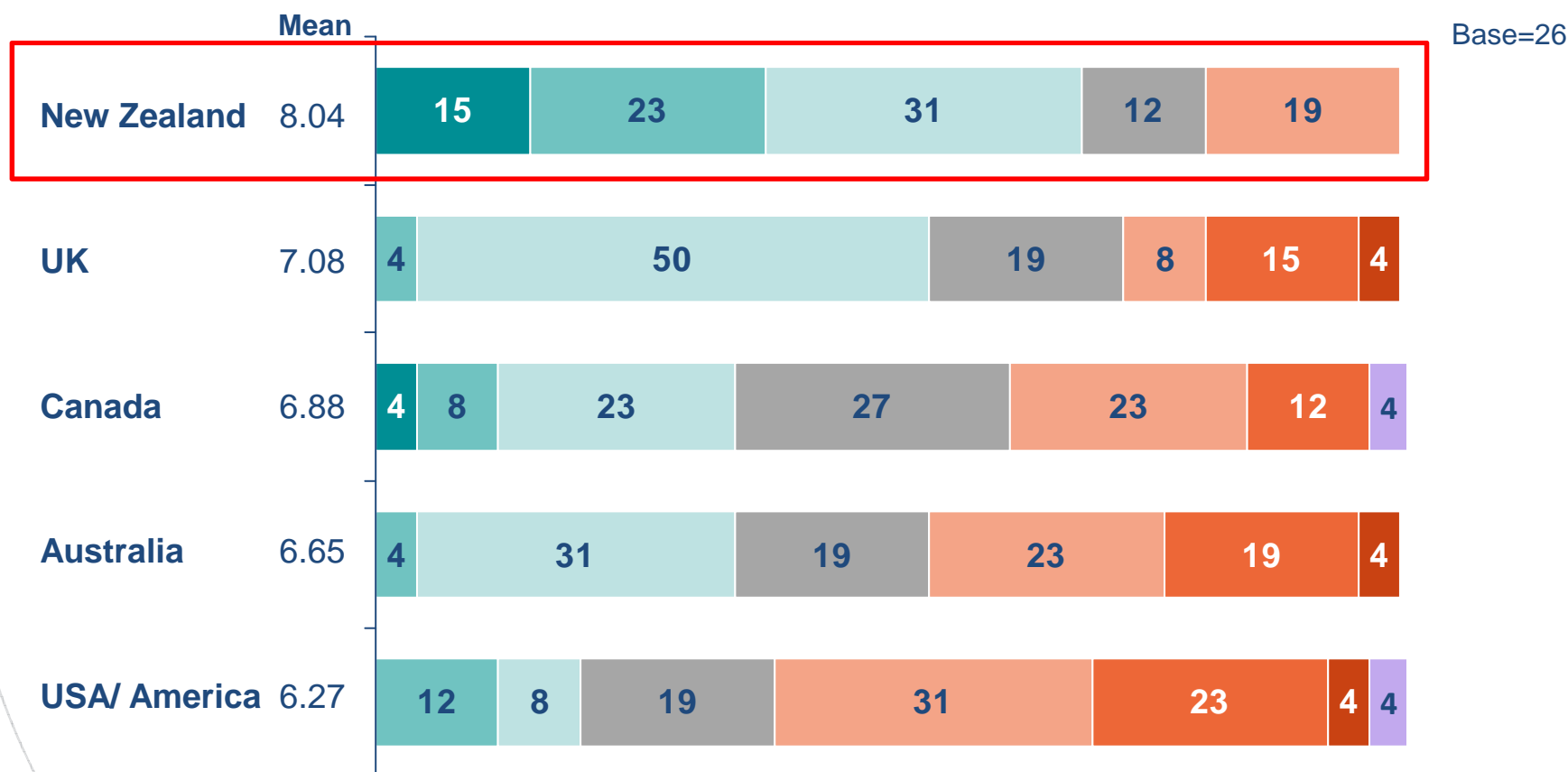


Base:
Q5:

All Respondents, n=31
How would you rate each of the following countries in terms of your overall opinion of it as a place to study?

Detailed Results of Performance as a Place to Study – Secondary School

Perfect 9 8 7 6 5 4 3 2 Really bad

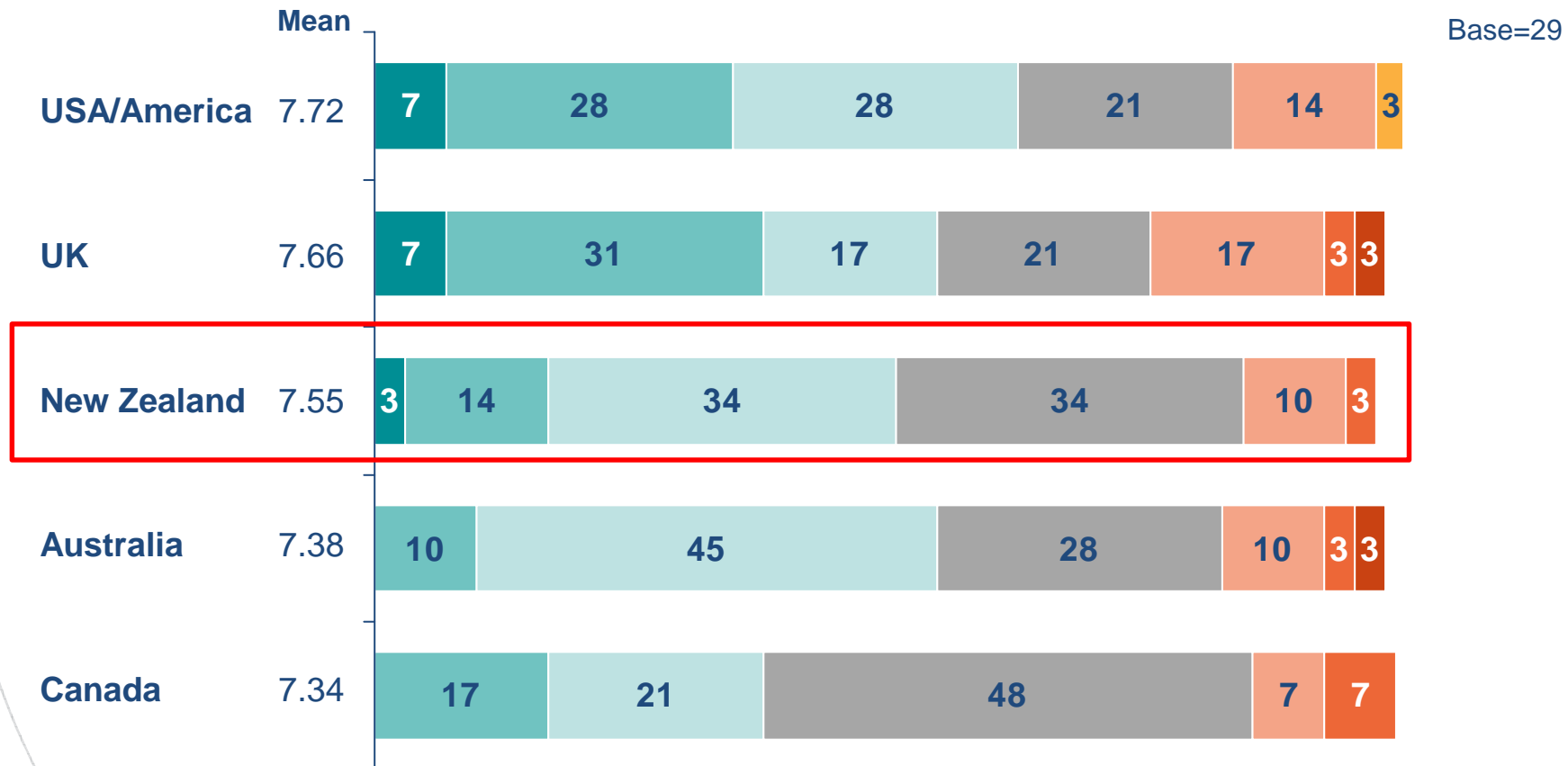


Base:
Q6:

Those whose customers study for secondary school, n=26
 How would you rate each country as a place to go to secondary school in ?

Detailed Results of Performance as a Place to Study – University

Perfect 9 8 7 6 5 4 3 2 Really bad

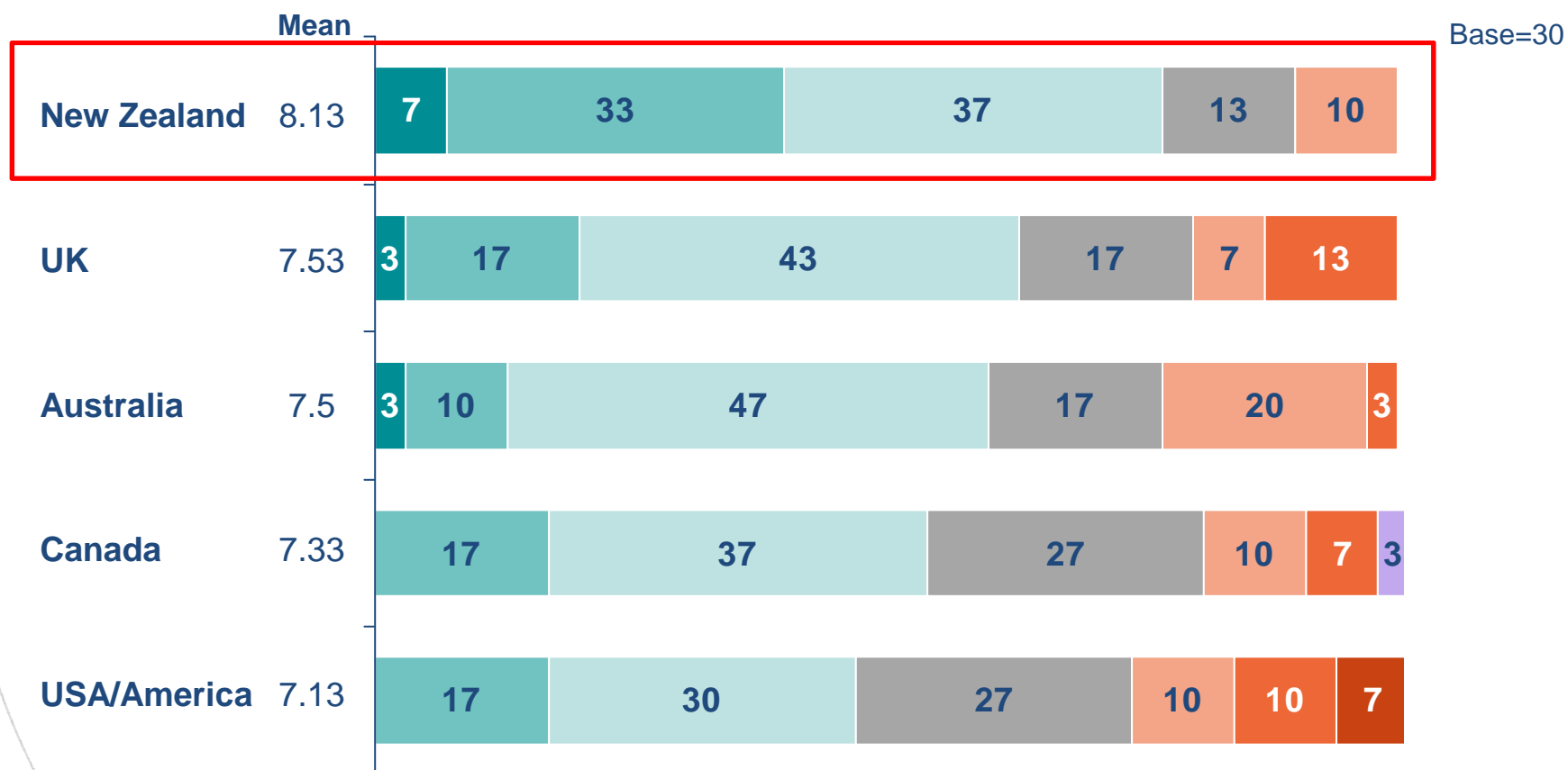


Base:
Q7:

Those whose customers study for university school, n=29
How would you rate each country as a place to go to university in?

Detailed Results of Performance as a Place to Study – Language Course

Perfect 9 8 7 6 5 4 3 2 Really bad

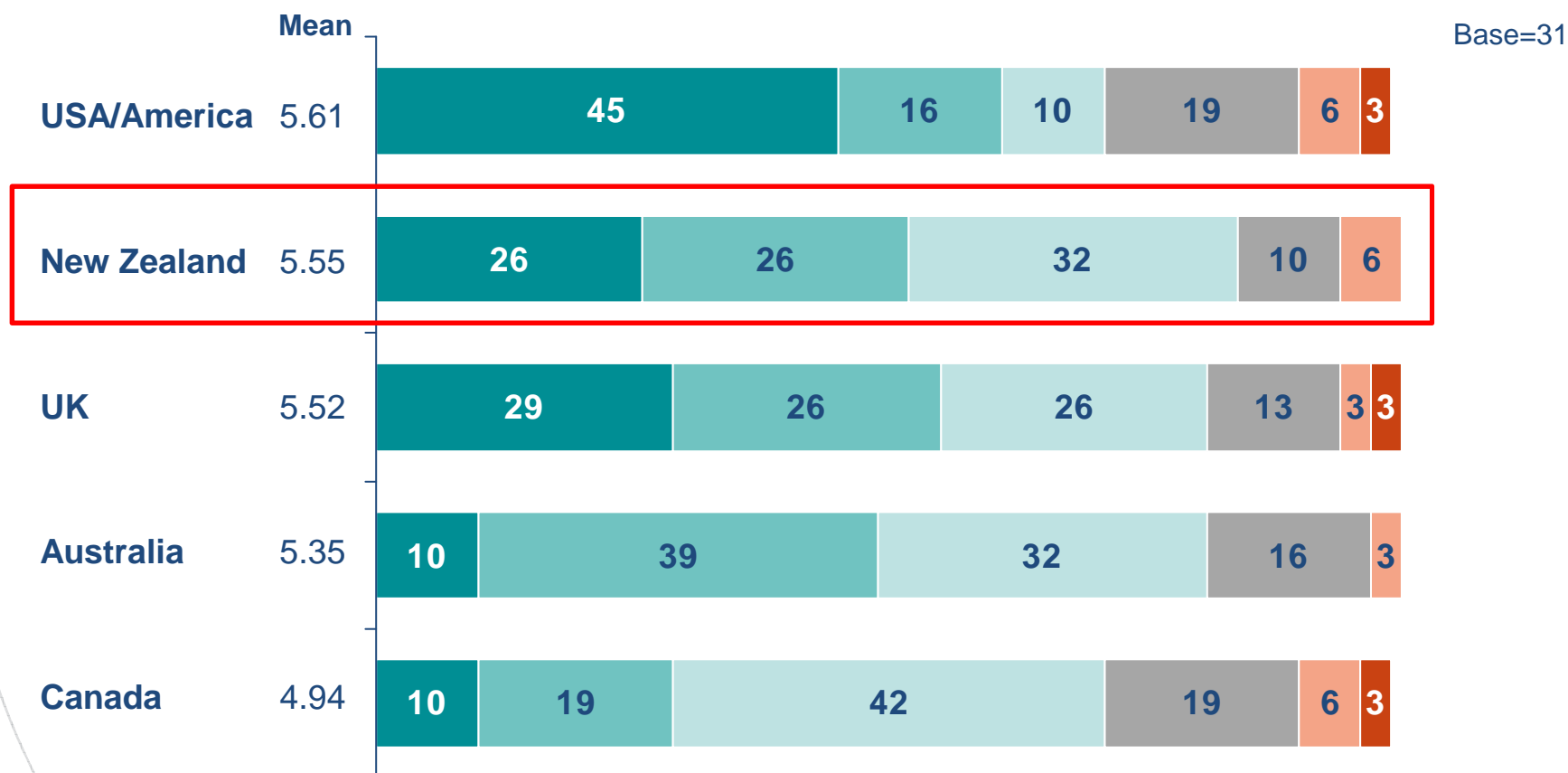


Base:
 Q8:

Those whose customers study for English language school, n=30
 How would you rate each country as a place to study English in, that is, go to an English language school?

Detailed Results of Importance as a Place to Study

Very important 6 5 4 3 2 Not at all important



Base:
Q9:

All Respondents, n=31
How important is your connection or relationship with each of these countries to you in terms of being a place to study?

Appendix

- Detailed Results of Country Perceptions

Education Agents

Perceptions of Specific Destination Countries (attributes 1-10)

	NZ	UK	Canada	USA	Australia
Is a good place to raise children/Children will not learn bad behaviour or bad hobbies	100	26 ▼	42 ▼	6 ▼	35 ▼
Cost of education is not expensive	97	-	16 ▼	3 ▼	23 ▼
Cost of living is not expensive	97	-	13 ▼	6 ▼	10 ▼
Is safe/has little crime	97	16 ▼	39 ▼	3 ▼	39 ▼
Has a wide range of outdoor/adventure activities available	97	26 ▼	48 ▼	45 ▼	81 ▼
Has friendly homestay families	90	29 ▼	42 ▼	16 ▼	35 ▼
Education system encourages independent thinking	87	84	74	90	77
Allowed to work part-time while studying	87	61 ▼	52 ▼	45 ▼	74
Allows students the flexibility to choose the types of courses/subjects they want to study	84	71	61 ▼	81	68
Has relatively small class sizes	84	55 ▼	48 ▼	52 ▼	58 ▼

Base:
Q23:
▼▲:

All respondents, n=31
What countries can apply to the statement?
Compared with NZ, the perception of the country is better ▲ or worse ▼ at 95% significance level

Perceptions of Specific Destination Countries (attributes 11-22)

	NZ	UK	Canada	USA	Australia
Easy to get a visa	81	35 ▼	52 ▼	32 ▼	81
Has a good climate/weather	77	-	23 ▼	16 ▼	74
Very accepting of people from other countries	71	29 ▼	48	52	48
Easy to travel to/from Taiwan	65	42	42	58	87 ▲
Has strong standards for the care and protection of international students	65	35 ▼	26 ▼	26 ▼	52
Has a wide range/diversity of people and cultures	58	52	52	84 ▲	55
Qualifications are highly regarded internationally	52	81 ▲	55	84 ▲	55
Number of tests required for each course is relatively few	45	35	29	26	35
Easy to be accepted in educational institutions	45	42	26	39	74 ▲
Easy to be allowed to stay in the country after studying	45	13 ▼	58	19 ▼	42
Has a lively, interesting lifestyle	45	45	45	81 ▲	55
Is a very convenient place to live	45	61	42	52	58

Base:
Q23:
▼▲:

All respondents, n=31
What countries can apply to the statement?
Compared with NZ, the perception of the country is better ▲ or worse ▼ at 95% significance level

Perceptions of Specific Destination Countries (attributes 23-35)

	NZ	UK	Canada	USA	Australia
Many Taiwanese people live or study here	32	29	61 ▲	74 ▲	65 ▲
Education institutions pay a higher level of commission	32	35	32	32	52
Has teachers/researchers who are highly regarded internationally	29	71 ▲	35	90 ▲	39
Famous/highly regarded people have studied here	29	77 ▲	29	97 ▲	29
Academic requirements are not too strict	29	16	10	23	52
Takes less time to complete the desired qualification	26	87 ▲	13	19	29
Has a formal alumni network that allows students to easily maintain contact with fellow students	26	52 ▲	32	71 ▲	39
The country is internationally recognised as being innovative	26	26	19	68 ▲	42
Education institutions are highly regarded internationally	19	87 ▲	35	94 ▲	19
Education institutions have a long history	19	94 ▲	26	68 ▲	23
Easy to get a scholarship	16	23	3	48 ▲	26
Is a technologically advanced country	16	32	26	100 ▲	23
Has a long history/culture	6	94 ▲	10	26 ▲	10

Base:

Q23:

▲ ▼ :

All respondents, n=31

What countries can apply to the statement?

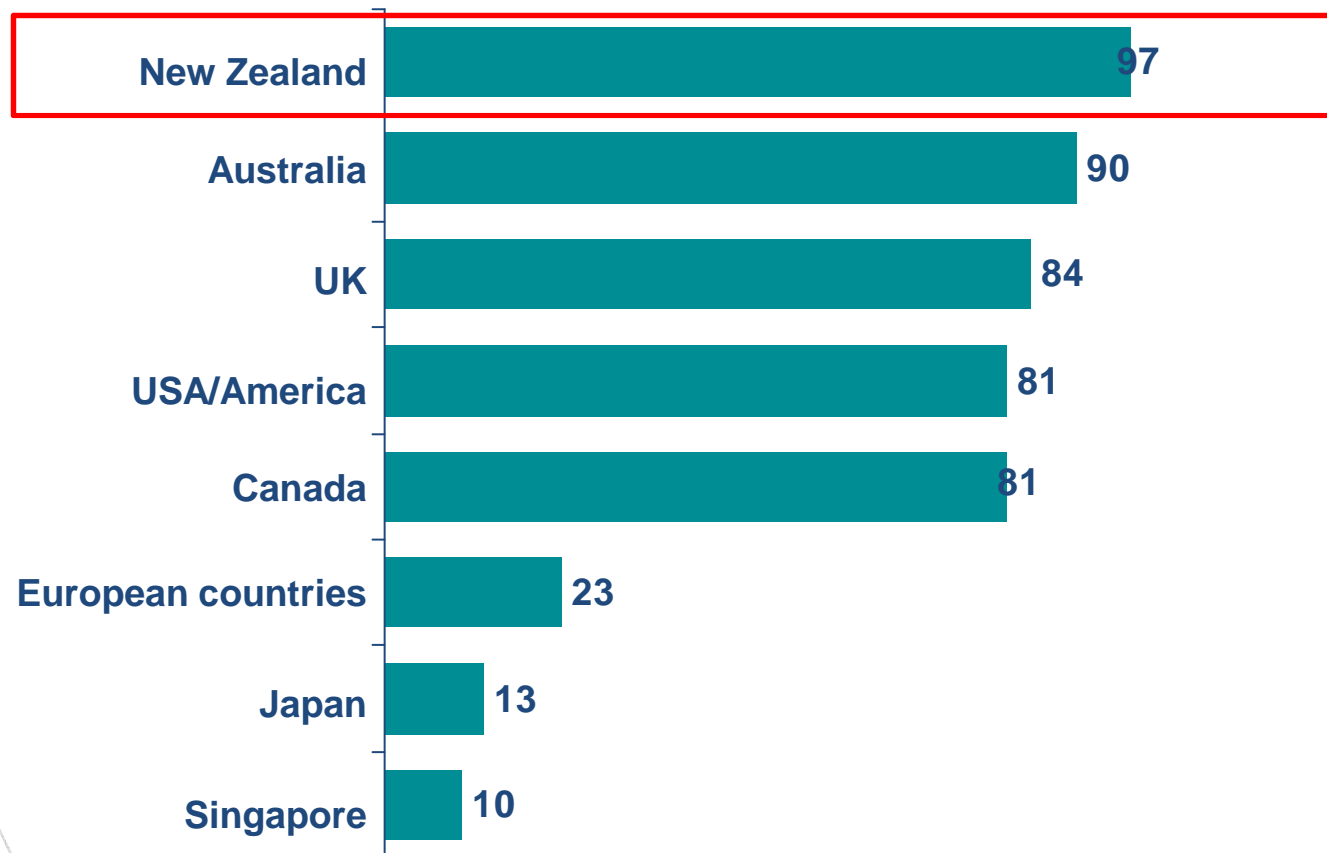
Compared with NZ, the perception of the country is better ▲ or worse ▼ at 95% significance level

Appendix

- Countries and Education Types Chosen by Customers

Education Agents

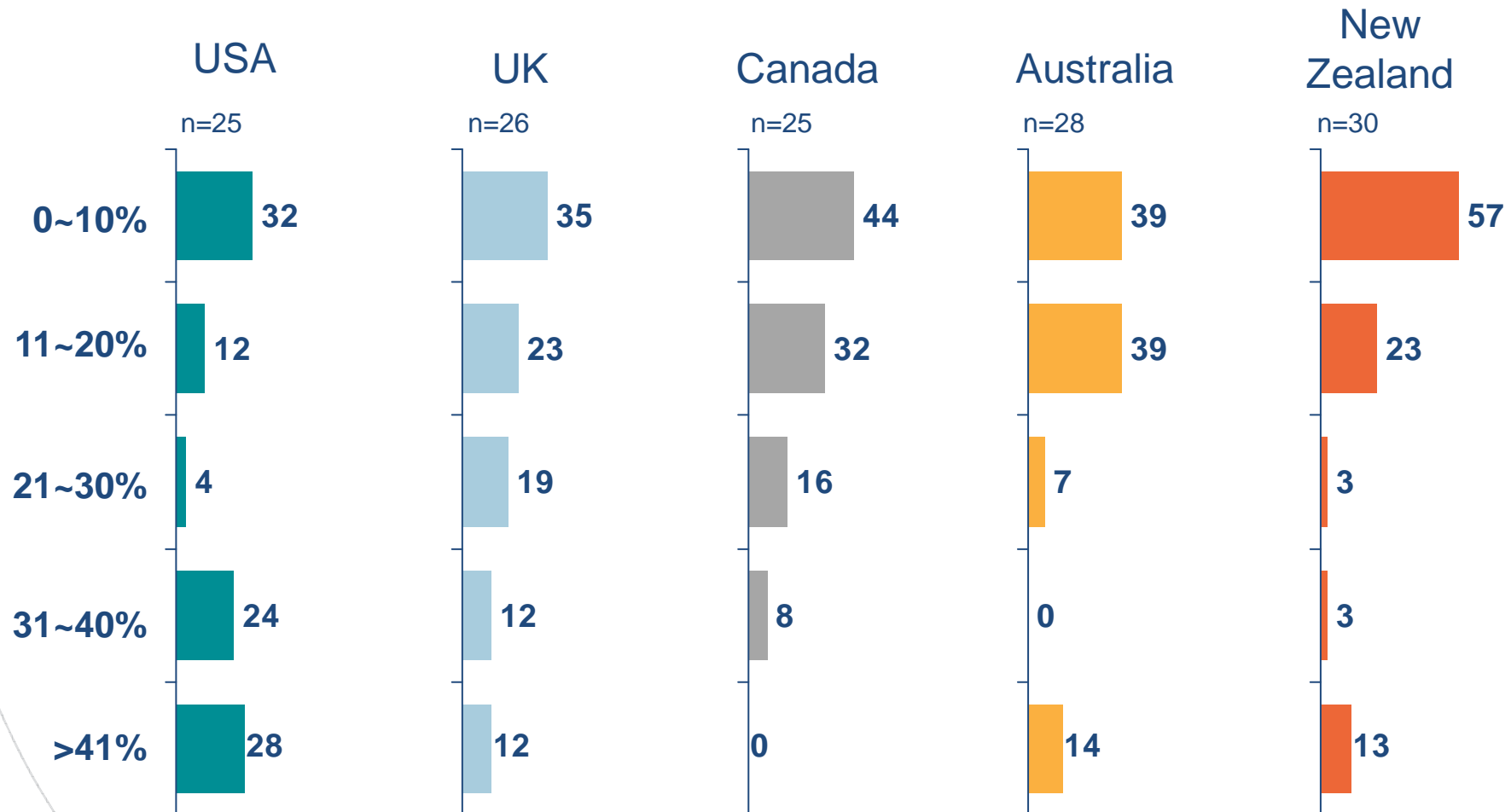
Countries That Customer Studied In



Base:
S2:

All respondent, n=31
In the past 3 years, which countries have your customers chosen to study in?

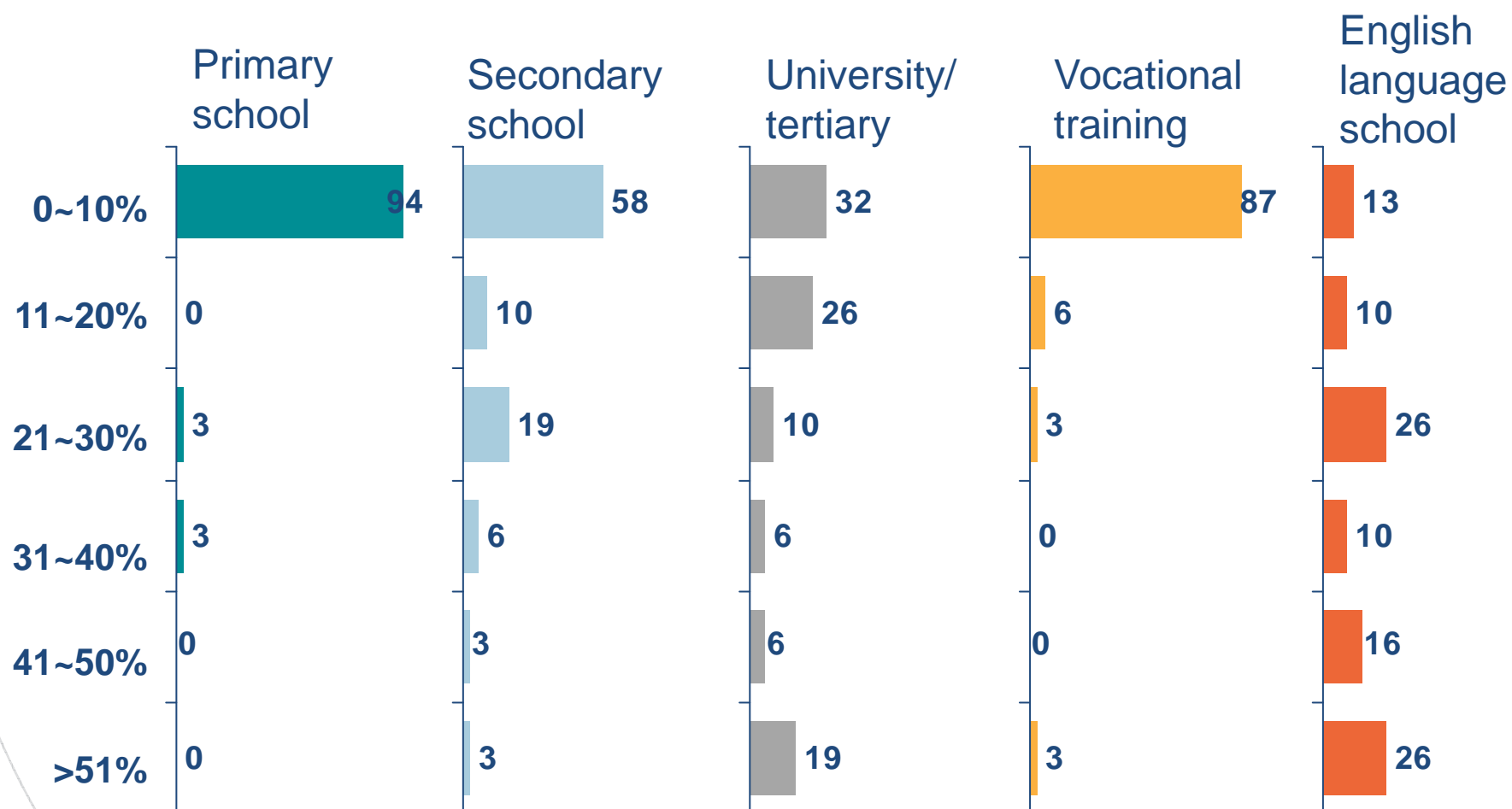
Countries Customer Studied In – Share of Each Country



Base:
S3:

Those whose customers study in the country
What was the share of each country over the past 3 years?

Type of Study Done by Customers – Share of Each Type



Base:
S4:

All respondents, n=31
What was the share between these different types of study?

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!