



Ipsos Marketing

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

## Result of Language course & Vocational training Students

Prepared for: Education New Zealand



21<sup>th</sup> 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, and it is the same as the potential students who are intending to study in language course and vocational training.
  - ⇒ *A lack of familiarity of NZ as a place of study* (as opposed to a place to holiday or live) was the main reason which led to low consideration, as well as the *weak perceptions of NZ* on factors important to Taiwanese people.
- NZ has low consideration among the key Western destination countries for both general students and intending students of language course and vocational training. 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*. Apart from these elements, intending students of language course and vocational training also rated *cost* as an important factor but with lower priority.
  - ⇒ NZ had weak associations with important drivers relating to *qualification and specialty reputation*, contributing to lower consideration of NZ generally, which was consistent among language course and vocational training students.
- For intending students of language course and vocational training, NZ had strong perceptions in *lower cost, safety, good for raising children, good weather* etc.
  - ⇒ *Costs of education/living* are relatively more important for language course and vocational training students, suggesting promoting NZ as an affordable study destination should be maintained.
- 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

- 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,
  - ⇒ Online media may be a cost-efficient way to reach language course and vocational training students.

# 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**

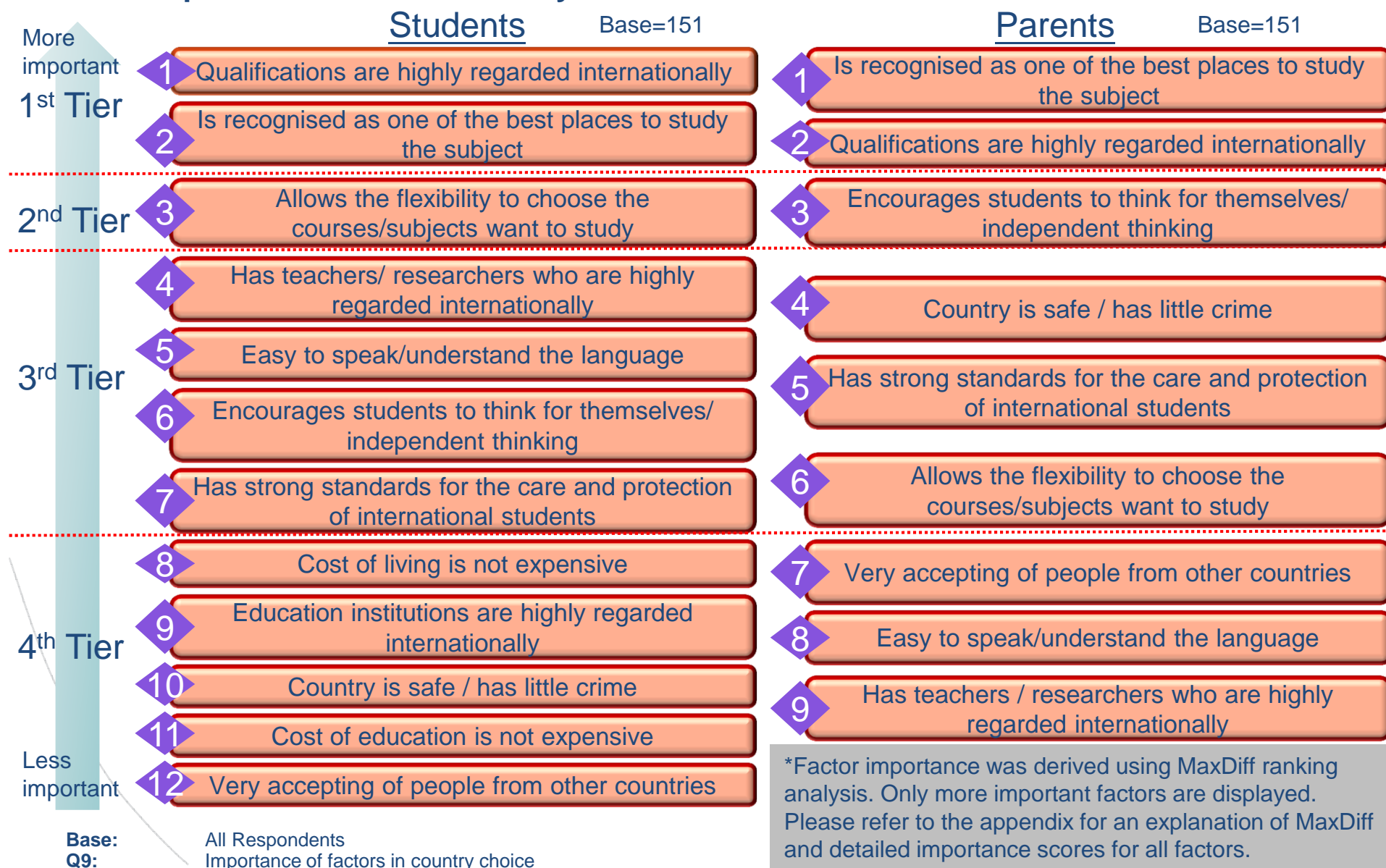
- Importance of Factors in Country Choice**

Potential students and  
Parents



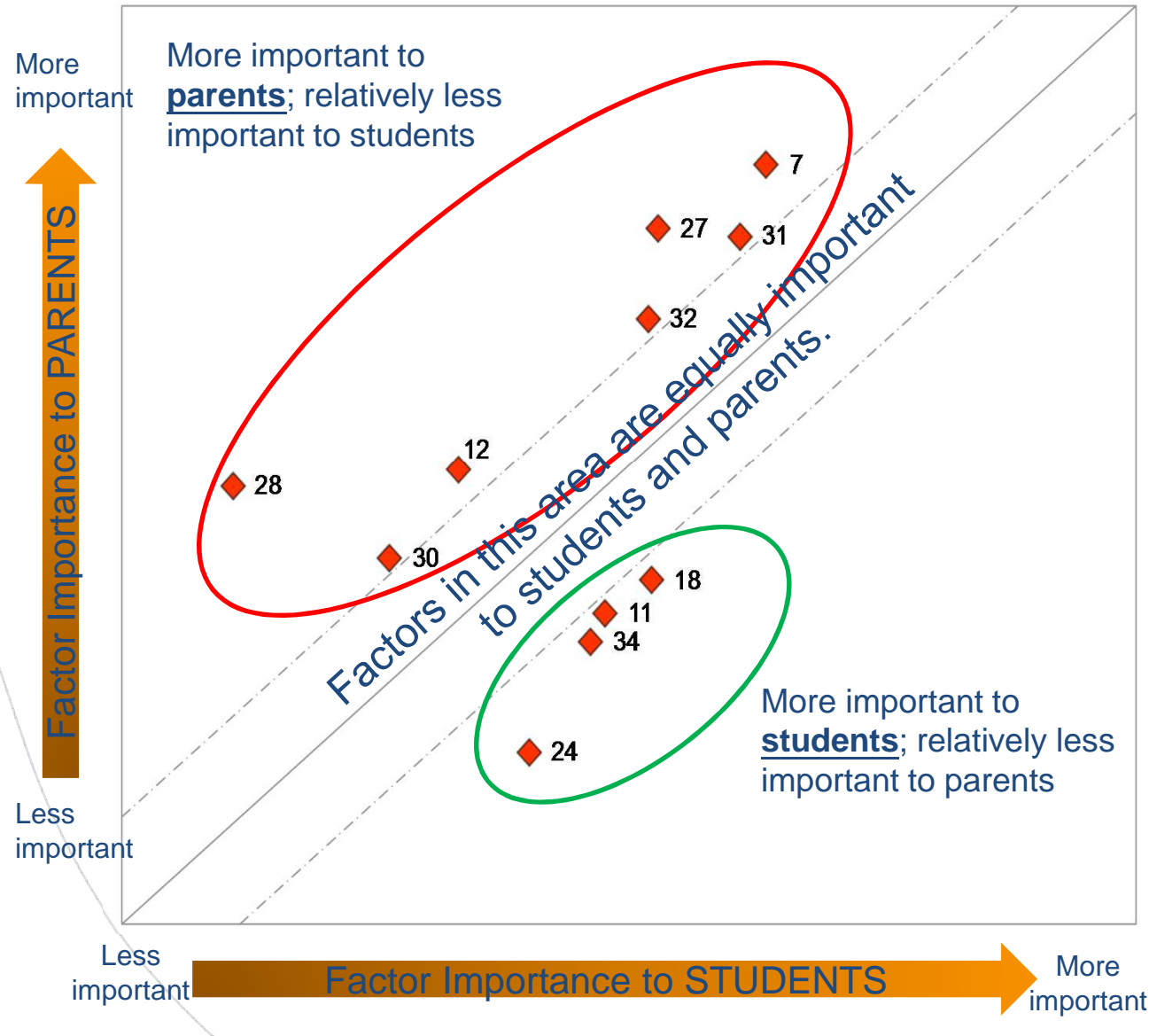
For both students and parents, the most important driver of country choice was the reputation of the intended qualification or place of study.

## Most Important Factors in Country Choice – Overall



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

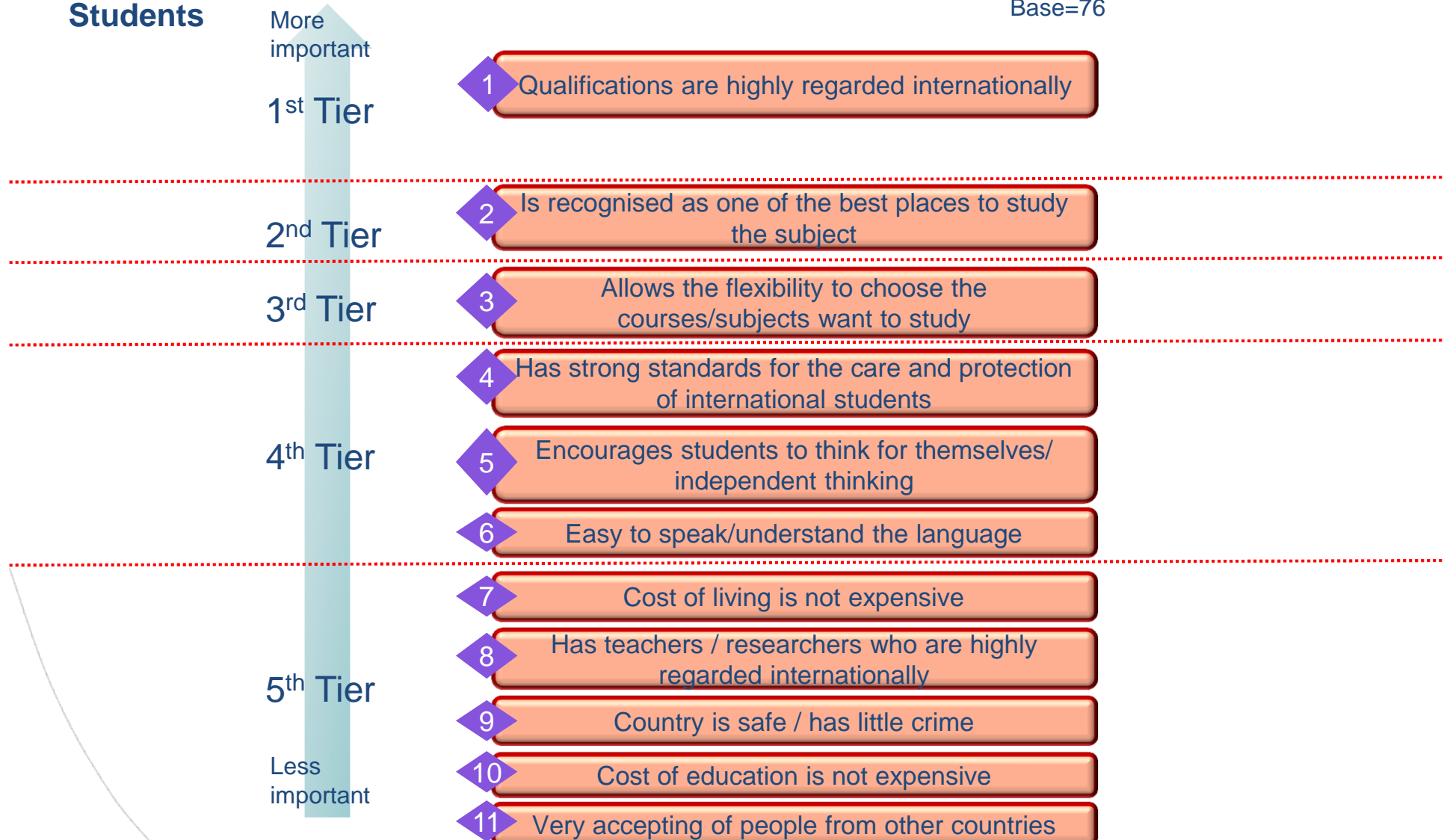


- |    |   |
|----|---|
| 7  | Education system encourages students to think for themselves (encourages independent thinking)  |
| 11 | Takes less time to complete the qualification want  |
| 12 | I have personal experience of the country   |
| 18 | Cost of education is not expensive  |
| 24 | Allowed to work part-time in the country while studying   |
| 27 | Country is safe / has little crime  |
| 28 | Country is a good place to raise children/ Children will not learn bad behaviour or bad habits. |
| 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                         |
| 34 | Country has a wide range/diversity of people and cultures                                       |

Cost was slightly more important to Language and Vocational training students, although it was not the primary concern for them.

## Most Important Factors in Country Choice – Language course & Vocational training Students

Base=76



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**

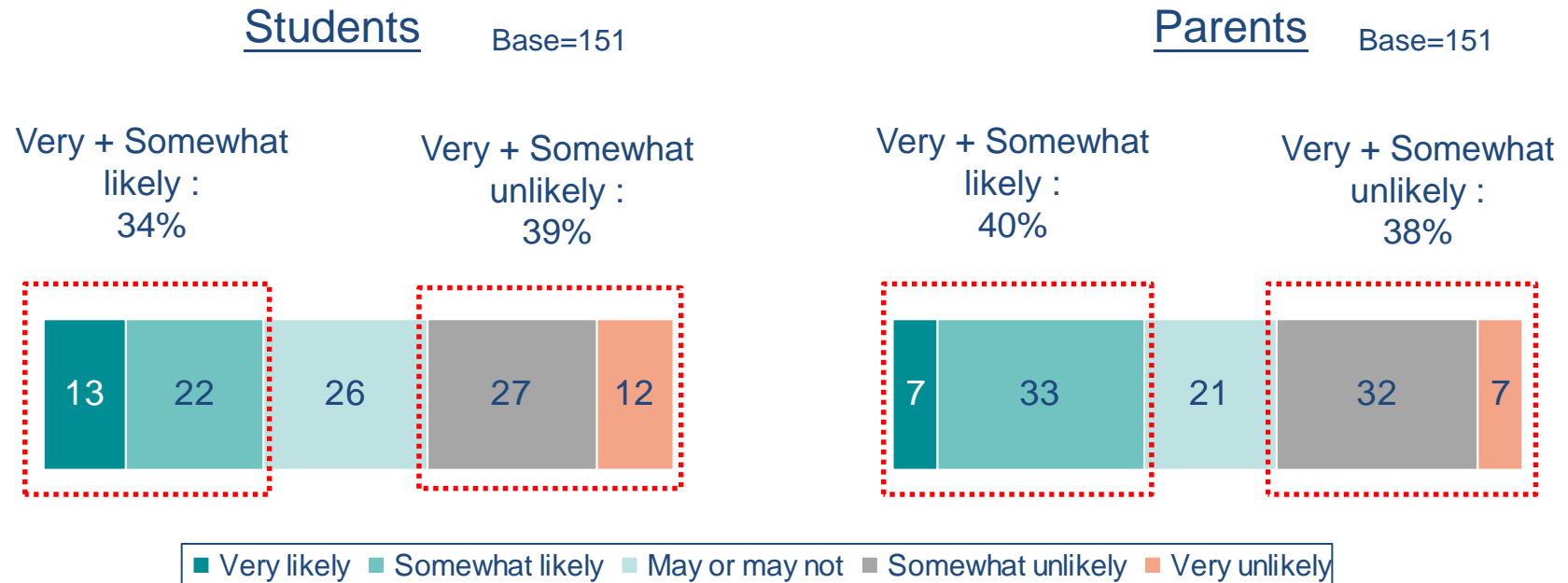
Potential students and  
Parents





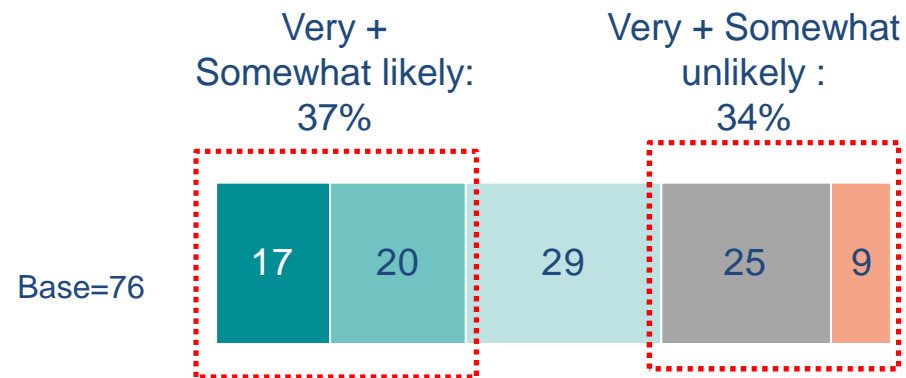
Increasing students and parents' consideration of NZ as a place of study is strongly required. For both students and parents, the acceptance level was matched by the extent of rejection.

## Likelihood of Considering Studying in New Zealand



Students plan to study language course or vocational training had similar likelihood of considering NZ as the destination country.

## Likelihood of Considering Studying in New Zealand – Language course & Vocational training Students



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

*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 encouraging 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>			<u>Reasons for Considering Studying in New Zealand</u>		
	Students	Parents		Students	Parents
Base	99	90	Base	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?

For language course & vocational training students, lack of familiarity with NZ as a place of study was still the key concern to consider studying in NZ.

## Motivators and Barriers to Considering Studying in New Zealand – Language course & Vocational training Students

<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	48	✓ Country is safe/has little crime	45
✗ The country is not the best places to study the subject interested in	44	✓ Many Taiwanese people live or study there	27
✗ Don't know anyone living or studying there/have not lived or studied there	25	✓ Is a good place to raise children/Children will not learn bad behaviours or bad hobbies	18
✗ Friends/family recommend not going there	23	✓ Friends/family recommend it	18
✗ Not many Taiwanese people live or study there	15	✓ Cost of living is affordable/not expensive	9
✗ Education institutions do not have a good reputation	12	✓ Easy to be accepted in educational institutions	9
	8	✓ Cost of education is affordable/not expensive	9
		✓ Yourself/friends/family live or study there/have lived or studied there	9
		Only mentioned by >10% (among total) are shown	

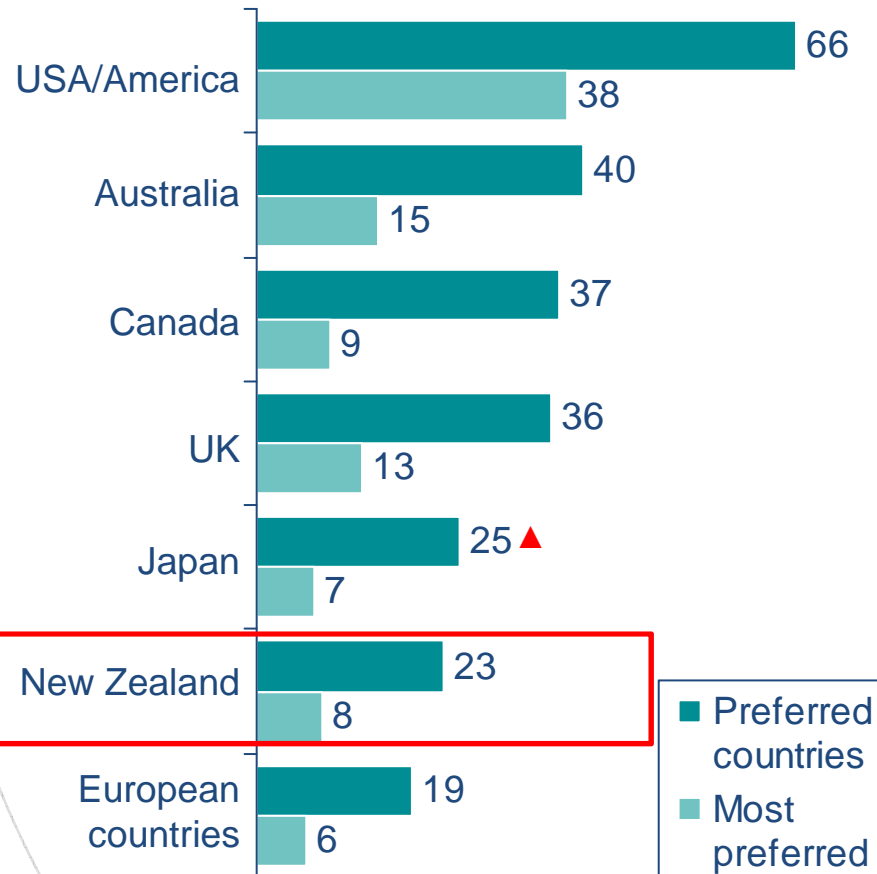
Base: Those who were somewhat unlikely or very unlikely to consider studying in NZ  
 Q8: For what reasons would you not consider studying in New Zealand?  
 Base: Those who didn't prefer NZ but were likely to consider studying in NZ  
 Q7: For what reasons would you consider studying in New Zealand?

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

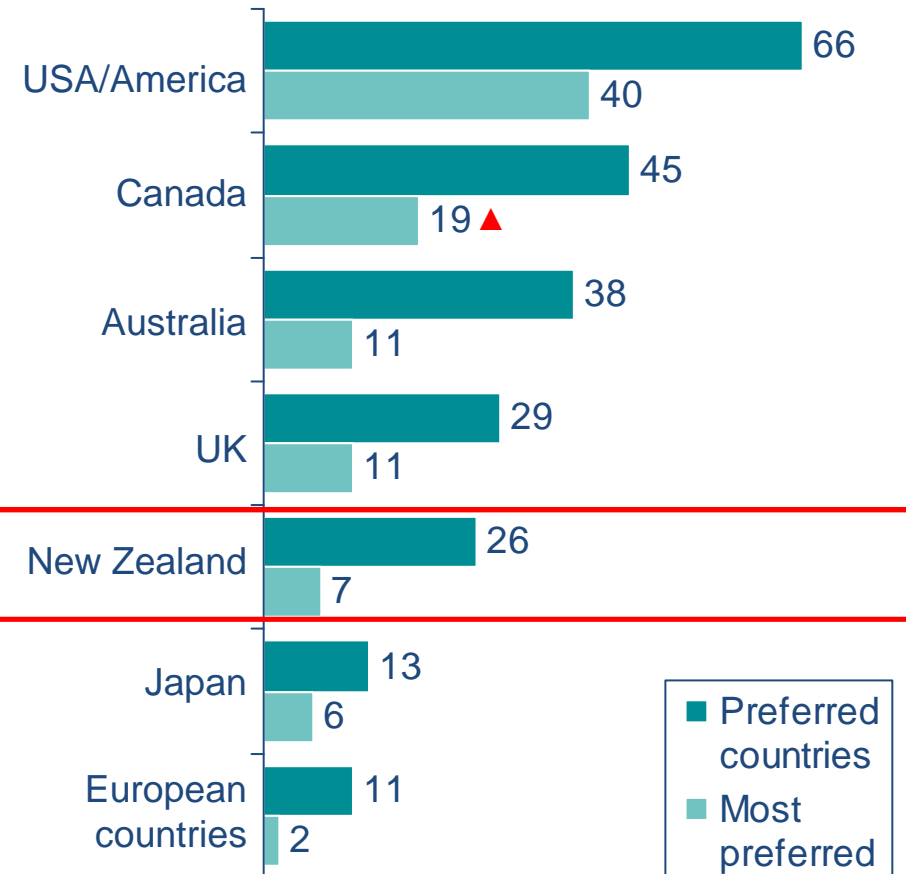
### Students

Base=151



### Parents

Base=151

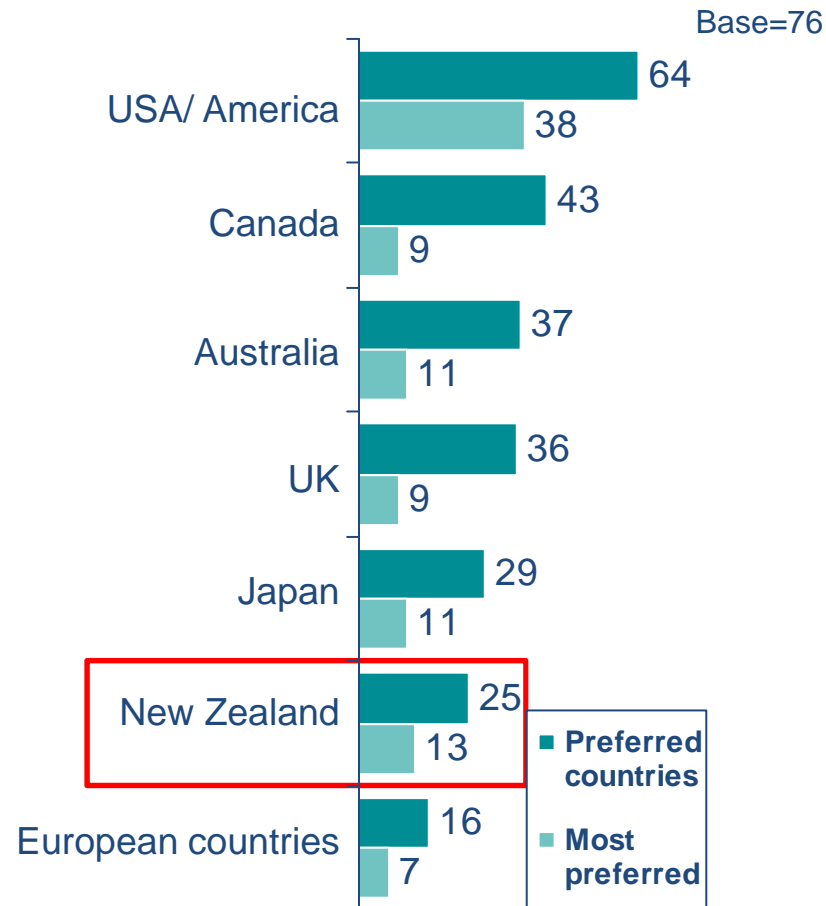


▲ denote significantly higher at 95% confidence level, comparing Students and Parents

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

For intending students of language course and vocational training, their preference was similar with general students, where NZ was preferred on par with Japan.

## Preferred Destination Study Countries – Language course & Vocational training Students



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.

Attitudinal Equity



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

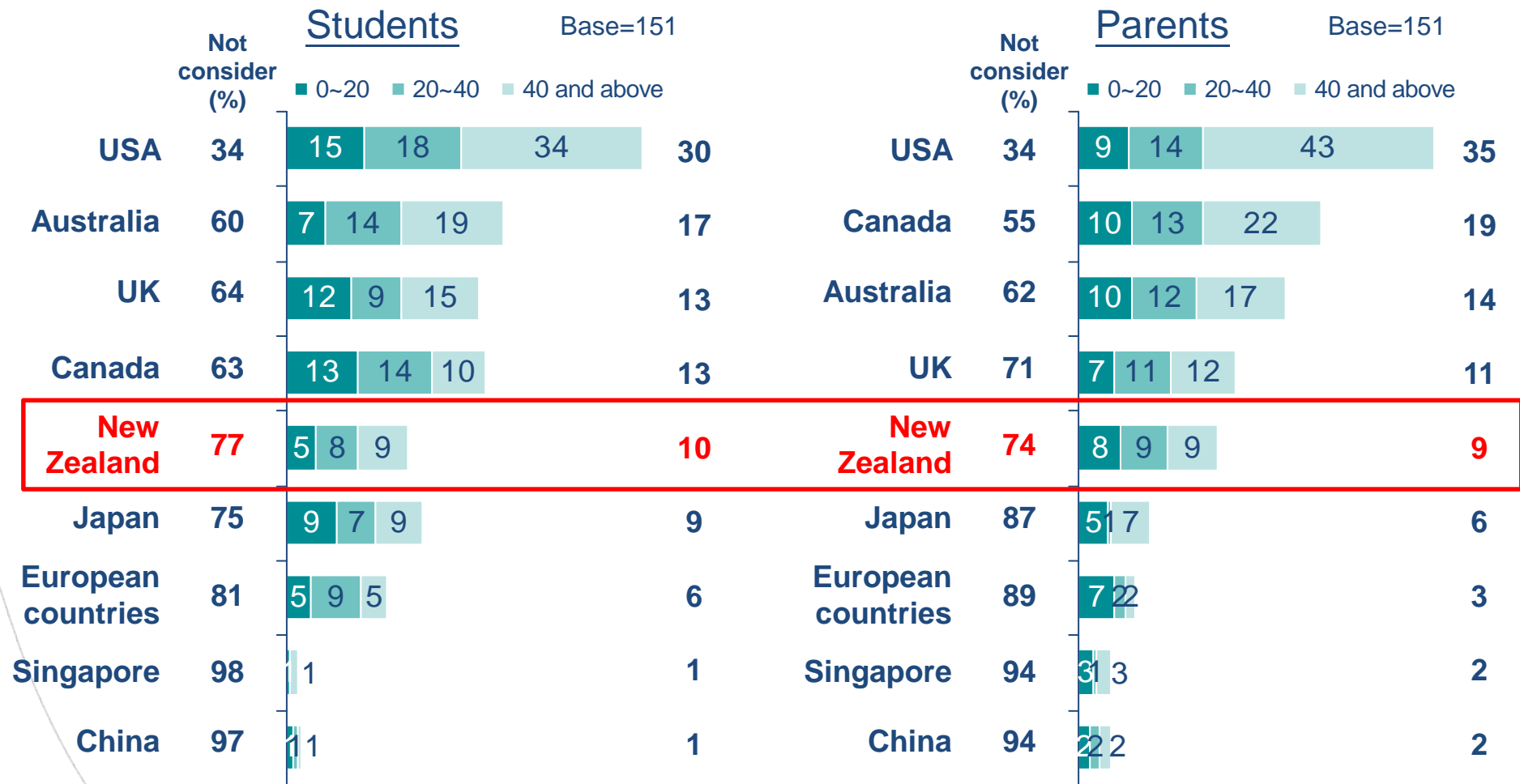




NZ's brand equity was similar among both students and parents, with *a lack of consideration* being the key contribution to weak brand equity. Increasing knowledge of NZ as a place of study is required to lift consideration of studying in NZ.

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

## Attitudinal Equity of Each Country



Base:

Q3:

Q4:

All respondent

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

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	65	45	Base	24	25	Base	6
<Environments>	75	73	<Environments>	71	64	<Environments>	100	
✓ Good environment/ beautiful natural scene	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	✓ 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	✓ Many Chinese people live in the country	17	12	<Cost>	33	
✓ Country has a wide range/diversity of people and cultures	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 ▲	<Schools/ Qualifications>	54	40			
✓ Familiar with the language/ culture/ Can speak the local language	8	13	✓ Has many top schools/schools with good reputation	25	16			
<Schools/ Qualifications>	37	31	✓ Has many schools to choose from	21	8			
✓ Has many top schools/ schools with good reputation	12	11	<Others>	8	40 ▲			
<Others>	15	38 ▲	✓ Have relatives/friends in that country	8	36 ▲			
✓ Have relatives/ friends in that country	11	29 ▲						

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

\*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?

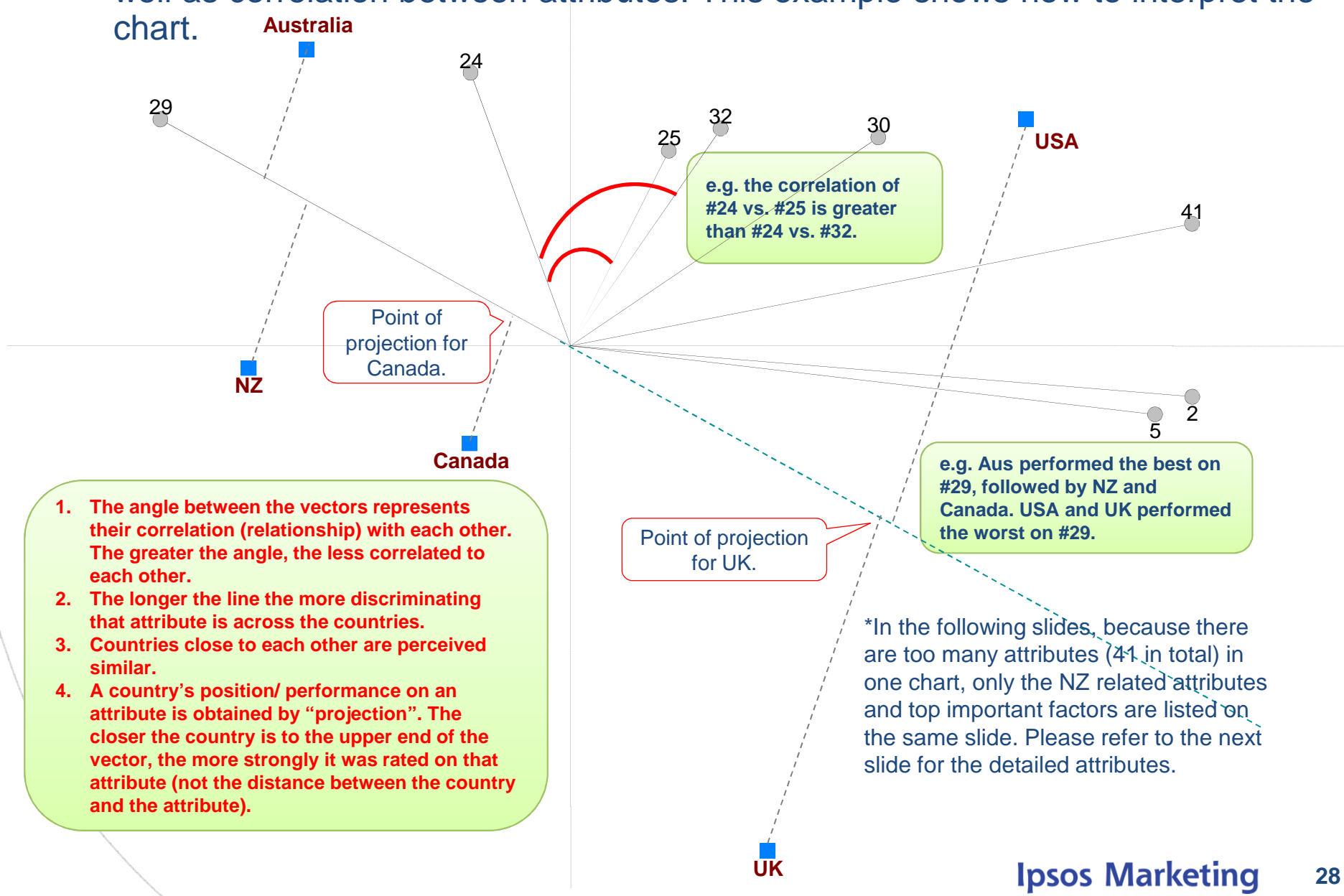
# **Key Findings**

## **- 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.

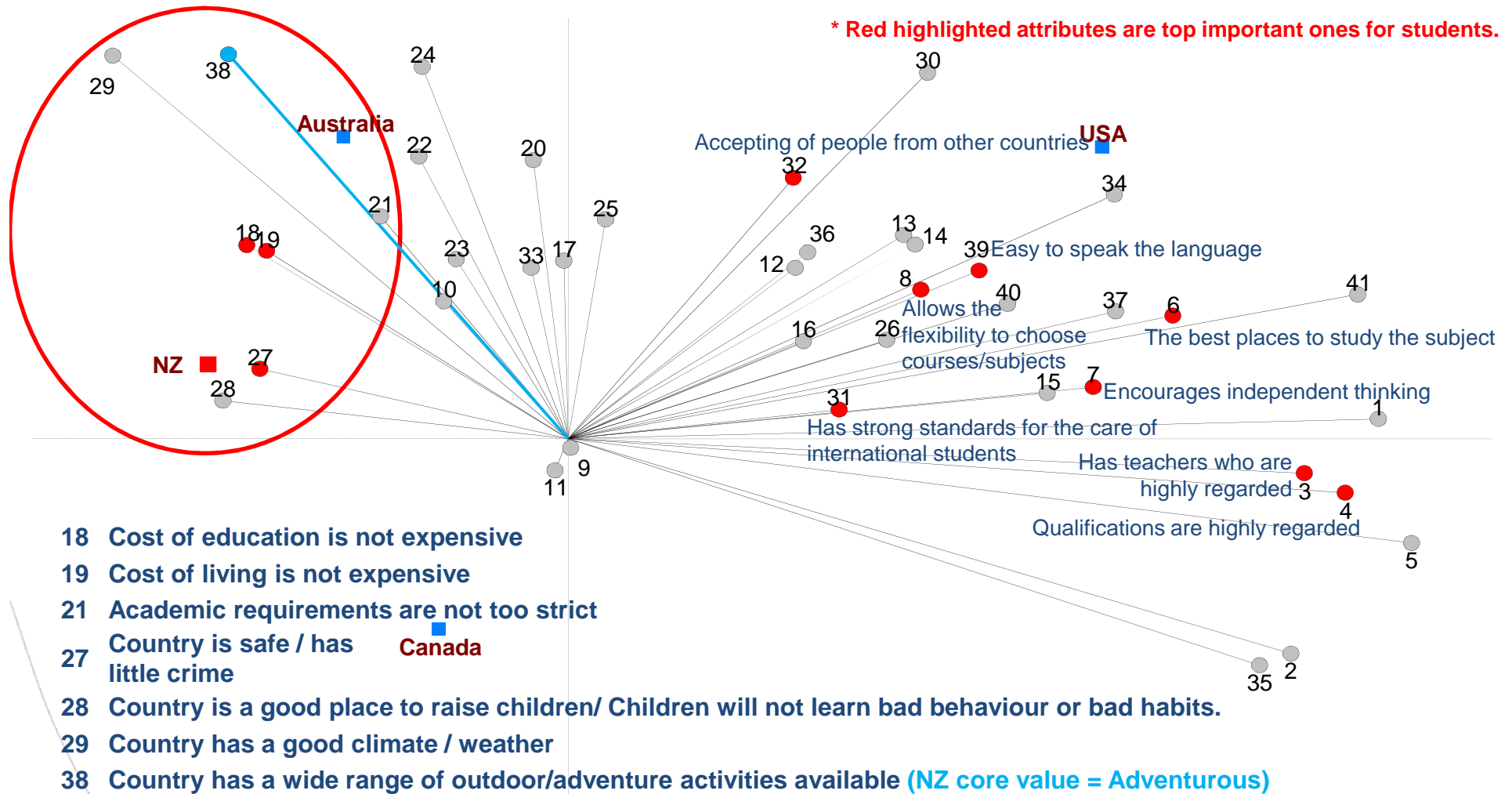


## Detailed attributes used in the biplots

- 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

NZ was well associated with affordable costs and safety, which were also important to intending students of language course and vocational training.

## Country Perceptions – Language Course & Vocational Training Students



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



Besides *academic reputation, family/friends recommendation or having family/friends live or study there* were the common drivers for language course and vocational training students' country choice.

## Reasons for Preferring a Country – Language Course & Vocational Training Students

	USA/ America	Canada	Australia	UK	New Zealand
Base	48	29	27	24	17
✓ Education institutions have good reputation	71	62	59	67	53
✓ Friends/family recommend it	56	62	63	50	53
✓ The country is recognised as one of the best places to study the subject you're/ your child is interested in	52	41	37	46	35
✓ Qualifications are internationally recognised	52	31	48	50	41
✓ Yourself/friends/family live or study there/have lived or studied there	35	59A	41	33	53
✓ Easier to speak the language	38	21	33	25	18
✓ Country is safe/has little crime	25	45	33	42	29
✓ Many Taiwanese people live or study there	27	28	15	21	35
✓ Easy to be allowed in the country/get a visa	25	31	19	21	35
✓ People in the country are very accepting of people from other countries	27	24	30	29	12
✓ Can work in the country after studying	23	14	33D	8	41BD
✓ Close to Taiwan	21	14	22	17	12
✓ Cost of living is affordable/not expensive	19	14	22	12	47ABD
✓ Teachers/school advisors recommend it	23	17	19	33	24
✓ Easy to be accepted in educational institutions	23	17	22	21	24
✓ Takes less time to complete the qualification	19	24	11	25	29
✓ Cost of education is affordable/not expensive	12	10	11	4	35ABD
✓ Education agents recommend it	15	10	11	4	12
✓ Is a good place to raise children/Children will not learn bad behaviours or bad hobbies	4	3	11	12	24AB

\*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

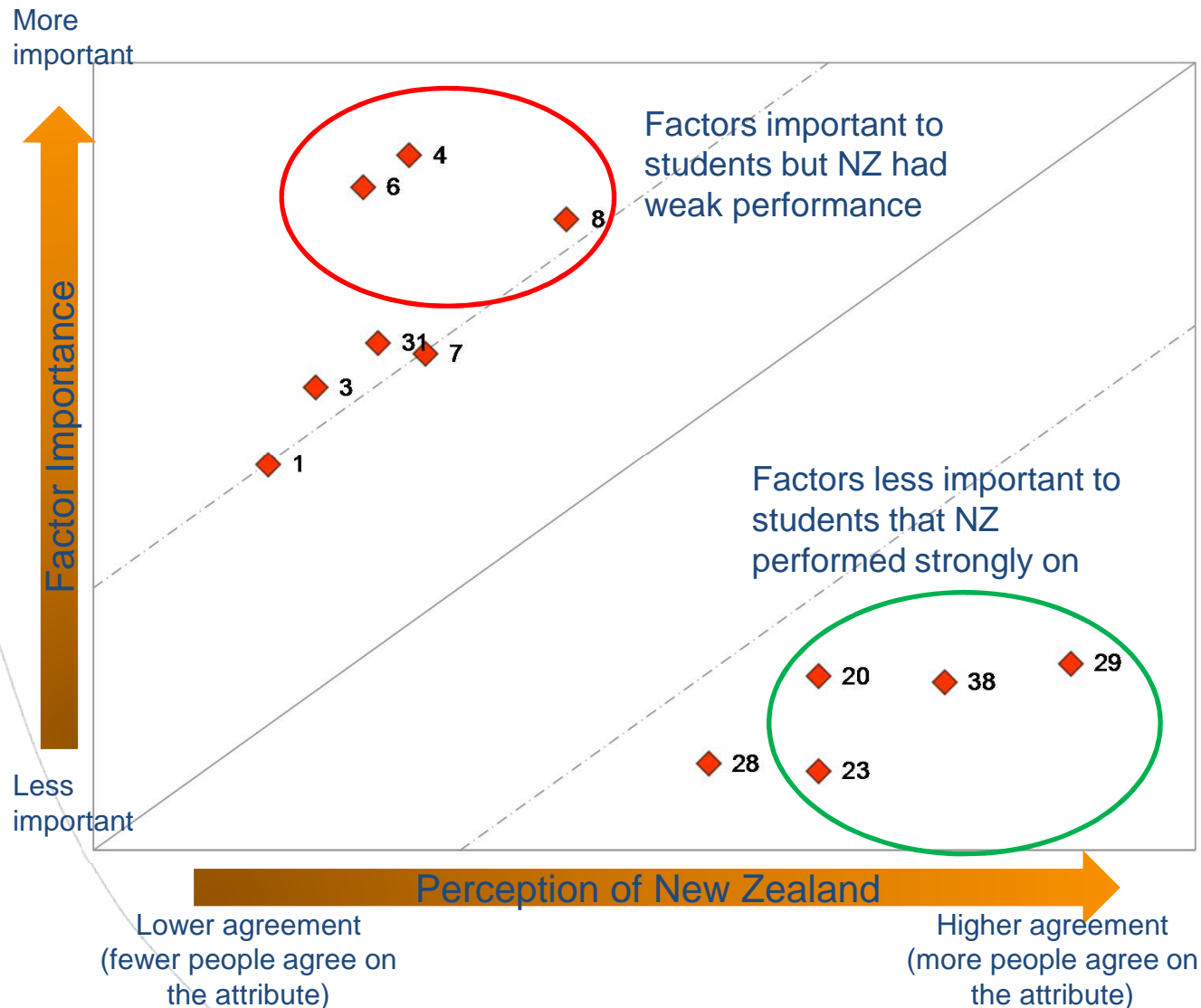
Base:  
Q6:

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



Academic qualification and specialty were important factors for intending students of language course and vocational training, but NZ had weak performance.

## Factor Importance vs. Perceptions of NZ – Language Course & Vocational Training Students



- |    |   |
|----|---|
| 1  | Education institutions are highly regarded internationally                                      |
| 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   |
| 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  |
| 31 | Has strong standards for the care and protection of international students                      |
| 38 | Country has a wide range of outdoor/adventure activities available                              |



## **Key Findings**

- Information Sources and Communication Perceptions**

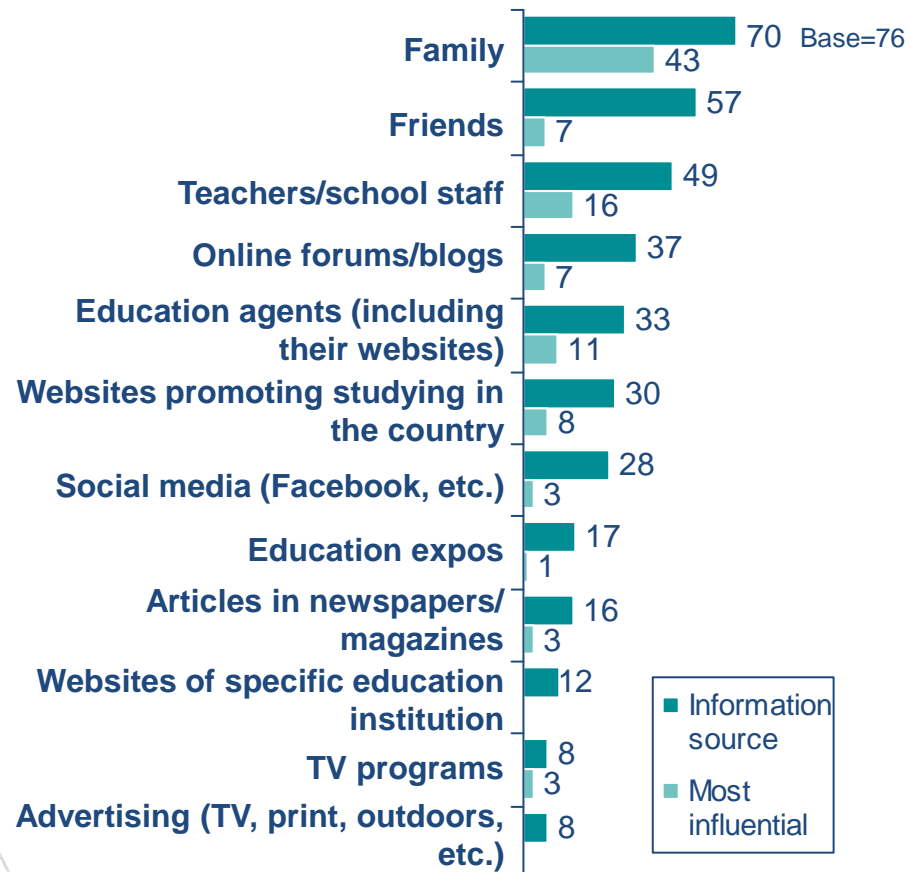
Potential students and  
Parents



Apart from word-of-mouth, internet was one of the common information source for the intending students of language course and vocational training. UK, USA and Australia were the education websites visited by those students.

## Information Sources for Country Choice and Websites Ever Visited – Language course & Vocational training Students

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

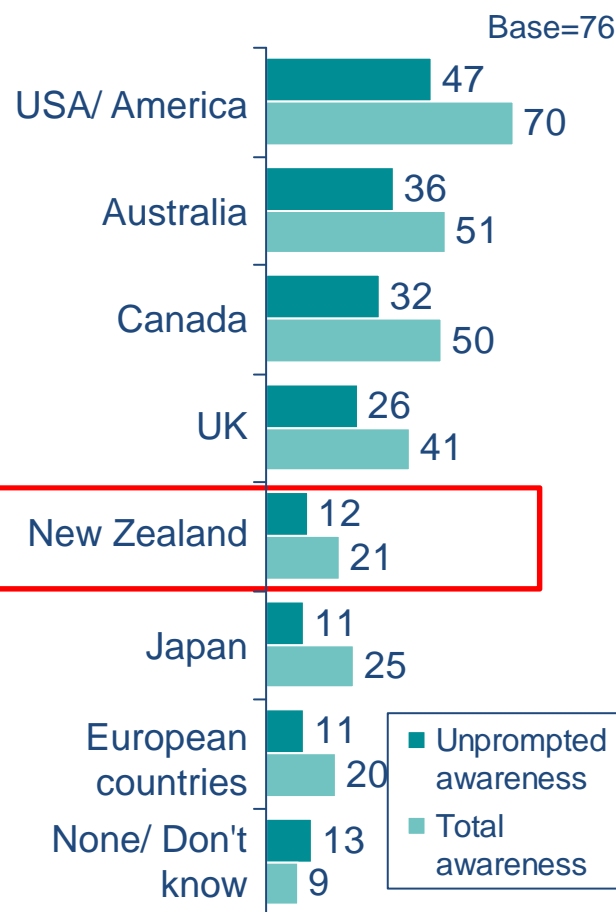


**Base:** All respondent,  
**Q11a:** Have you ever visited any of these websites?

Awareness of country advertising was similar with their country preference.

## Awareness of Country-Specific Promotions and Sources of Awareness of NZ-Specific Advertising – Language course & Vocational training Students

Awareness of Country-Specific Promotions



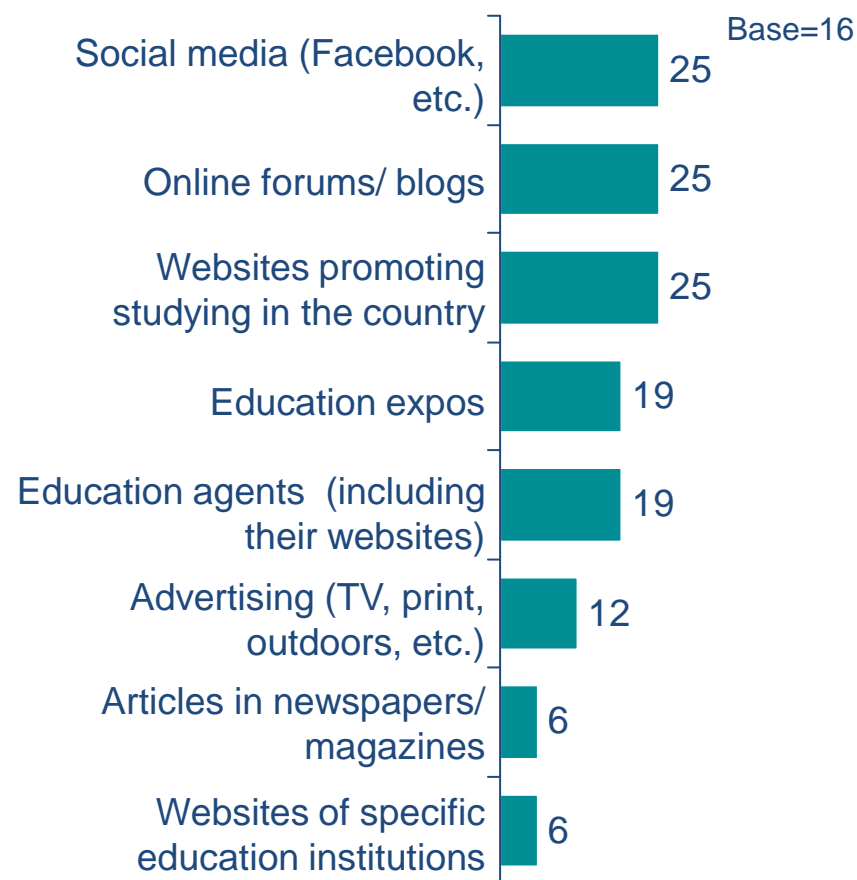
Base:  
Q13:

All respondent,  
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:  
Q15:

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



*Allowing part-time work* was captured by most of intending students of language and vocational training from NZ advertising.

## Information Received from New Zealand Advertising – Language course & Vocational training Students

	<i>Base</i>	16
✓ Allows work part-time		31
✓ Instructions of schools/subjects		19
✓ A good/best place for learning English		19
✓ Good climate		19
✓ Cost of living/study is affordable/not expensive		12

**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 – Language Course & Vocational Training students

## Most Important Factors

Rank	Attribute	Score
1	Qualifications are highly regarded internationally	5.31
2	The country is recognised as one of the best places to study the subject interested in	5.07
3	Allows the flexibility to choose the types of courses/subjects want to study	4.82
4	Has strong standards for the care and protection of international students	3.88
5	Education system encourages students to think for themselves (encourages independent thinking)	3.79
6	Easy to speak/understand the language	3.74
7	Cost of living is not expensive	3.56
8	Has teachers / researchers who are highly regarded internationally	3.54
9	Country is safe / has little crime	3.44
10	Cost of education is not expensive	3.42
11	People in the country are very accepting of people from other countries	3.25

## Less Important Factors

Rank	Attribute	Score
12	Is a very convenient place to live	2.99
13	Education institutions are highly regarded internationally	2.95
14	Has a lively, exciting lifestyle	2.88
15	Takes less time to complete the qualification you/ your children want	2.77
16	Country has a wide range/diversity of people and cultures	2.77
17	Easy to be accepted in educational institutions in the country	2.76
18	Allowed to work part-time in the country while studying	2.60
19	Has friendly homestay families	2.54
20	Is a technologically advanced country	2.41
21	Easy to be allowed to stay in the country after studying	2.40
22	My friends/family recommend it	2.29
23	Is a country internationally recognised as being innovative	2.13
24	School teachers / school advisors recommend it	2.08
25	Academic requirements are not too strict	2.06
26	I have personal experience of the country	1.96
27	Easy to get information about studying in the country	1.94
28	Easy to get a scholarship	1.89

## Least Important Factors

Rank	Attribute	Score
29	Has a long history / culture	1.57
30	Many Taiwanese people live or study there	1.52
31	Has a formal alumni network that allows you/ your children to easily maintain contact with fellow students	1.49
32	Country has a good climate / weather	1.44
33	Easy to be allowed in the country / get a visa	1.34
34	The number of tests required for each course is relatively few	1.31
35	Country has a wide range of outdoor/adventure activities available	1.30
36	Education institutions are historic / have a long history	1.26
37	Has relatively small class sizes (small number of students per class)	0.84
38	Education agents recommend it	0.82
39	Country is a good place to raise children/ Children will not learn bad behaviour or bad habits.	0.67
40	Easy to travel to/from Taiwan	0.62
41	Famous/highly regarded people have studied in the country	0.58

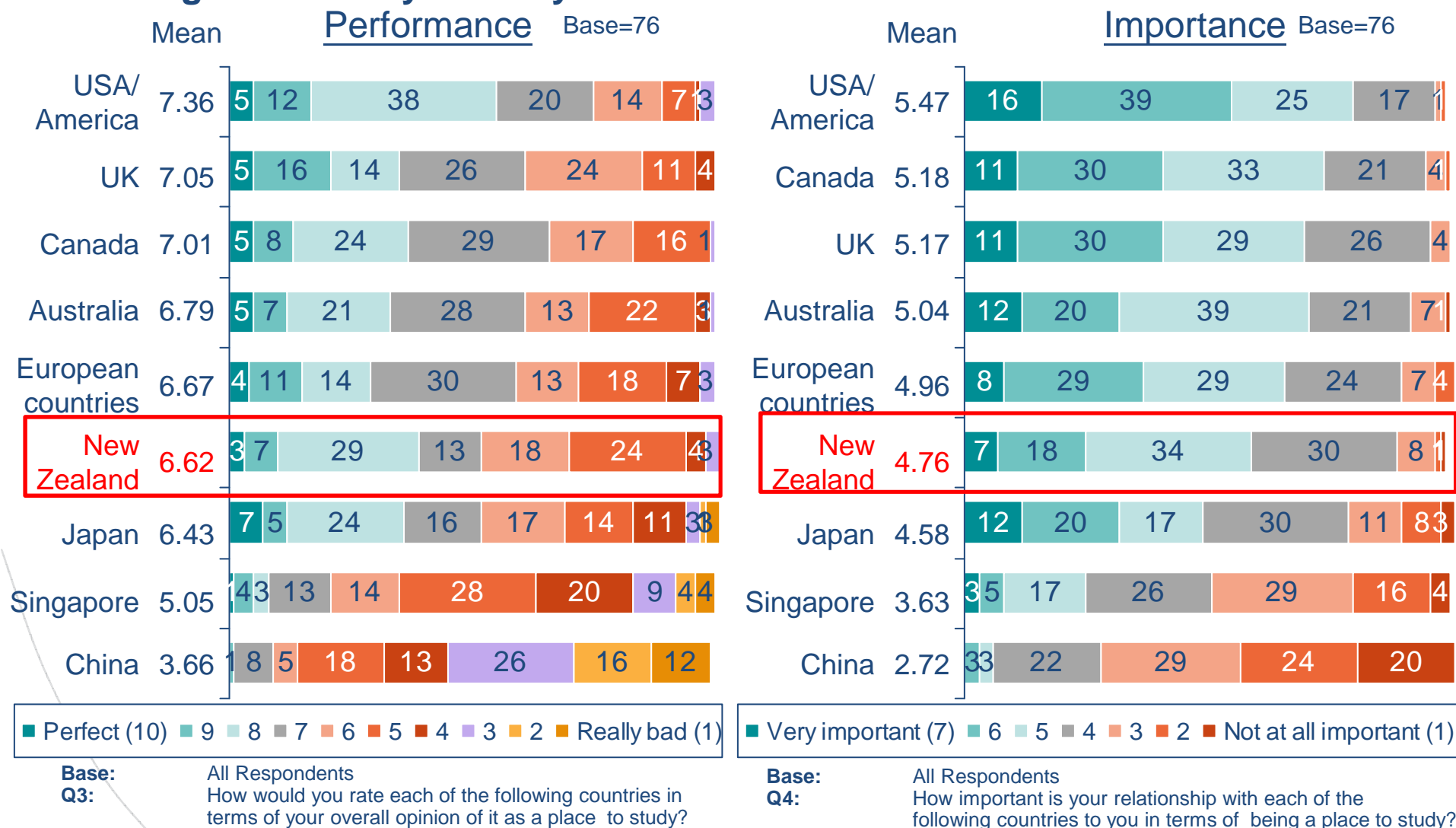


# **Appendix**

- Detailed Results of Country Importance and Country Performance**

Potential students and Parents

## Performance and Importance – Language Course & Vocational Training Students by Country



# **Appendix**

- Detailed Results of Country Perceptions**

Potential students and  
Parents

## Detailed Country Perceptions – Language Course & Vocational Training Students (attributes 1-15)

	NZ	UK	Canada	USA	Australia
Country has a good climate/weather	62	11 ▼	17 ▼	21 ▼	57
Country has a wide range of outdoor/adventure activities available	54	17 ▼	32 ▼	39	51
Allowed to work part-time in the country while studying	50	16 ▼	25 ▼	47	55
Country is safe/has little crime	47	22 ▼	22 ▼	11 ▼	26 ▼
Easy to be allowed in the country/get a visa	46	21 ▼	36	43	45
Easy to travel to/from Taiwan	46	16 ▼	24 ▼	33	39
Easy to get information about studying in the country	45	41	45	74 ▲	46
Cost of living is not expensive	42	1 ▼	12 ▼	9 ▼	29
Country is a good place to raise children/Children will not learn bad behaviour or bad hobbies	39	28	26	14 ▼	34
Cost of education is not expensive	38	3 ▼	16 ▼	9 ▼	25
Academic requirements are not too strict	38	8 ▼	16 ▼	20 ▼	41
Easy to be accepted in educational institutions in the country	34	12 ▼	24	32	36
Has a lively, exciting lifestyle	33	26	39	62 ▲	42
People in the country are very accepting of people from other countries	32	21	34	61 ▲	32
Has friendly homestay families	32	17 ▼	26	33	34

**Base:** All Language Course & Vocational Training Students, 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 – Language Course & Vocational Training Students (attributes 16-30)

	NZ	UK	Canada	USA	Australia
Allows you the flexibility to choose the types of courses/subjects you want to study	30	24	28	62 ▲	29
Has relatively small class sizes (small number of students per class)	29	28	28	25	20
Easy to speak/understand the language	29	38	34	74 ▲	28
Takes less time to complete the qualification you/ your children want	28	24	20	22	24
Country has a wide range/diversity of people and cultures	26	29	22	72 ▲	25
Education agents recommend it	25	39	25	53 ▲	30
The number of tests required for each course is relatively few	24	8 ▼	16	17	25
Easy to get a scholarship	24	3 ▼	16	26	24
Education system encourages students to think for themselves (encourages independent thinking)	21	32	25	82 ▲	29
Easy to be allowed to stay in the country after studying	21	7 ▼	25	41 ▲	24
Qualifications are highly regarded internationally	20	57 ▲	30	86 ▲	22
My friends/family recommend it	20	39 ▲	29	59 ▲	18
Many Taiwanese people live or study there	20	22	32	72 ▲	39 ▲
I have personal experience of the country (visited/lived there before, or have friends or family who have lived or studied there)	18	12	29	43 ▲	26
Has strong standards for the care and protection of international students	18	26	21	41 ▲	21

**Base:** All Language Course & Vocational Training Students, 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 – Language Course & Vocational Training Students (attributes 31-41)

	NZ	UK	Canada	USA	Australia
Is a country internationally recognised as being innovative	18	36 ▲	24	68 ▲	22
The country is recognised as one of the best places to study the subject you're interested in	17	33 ▲	21	70 ▲	16
Is a very convenient place to live	16	36 ▲	34 ▲	71 ▲	32 ▲
Has teachers/researchers who are highly regarded internationally	14	58 ▲	28 ▲	83 ▲	14
My teachers/school advisors recommend it	14	32 ▲	18	55 ▲	16
Has a formal alumni network that allows you/ your children to easily maintain contact with fellow students	14	21	26	51 ▲	20
Has a long history/culture	14	64 ▲	18	63 ▲	17
Education institutions are highly regarded internationally	11	64 ▲	26 ▲	89 ▲	20
Is a technologically advanced country	11	50 ▲	25 ▲	91 ▲	18
Education institutions are historic/have a long history	9	68 ▲	25 ▲	62 ▲	12
Famous/highly regarded people have studied in the country	7	55 ▲	25 ▲	87 ▲	3

**Base:** All Language Course & Vocational Training Students, 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 document

## Questionnaire: Parents of Potential Students



Microsoft Office  
Word document

## Questionnaire: Education Agents



Microsoft Office  
Word document



**Thank you!**