



Ipsos Marketing

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

## Results of Secondary School Parents

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.
  - ⇒ 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 secondary school 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*, which is also consistent among secondary school parents.
  - ⇒ NZ had weak associations with important drivers relating to *qualification and specialty reputation*, contributing to lower consideration of NZ generally.
- Same with general parents, secondary school parents are particularly concerned about *student's safety and care* and NZ's favorable associations on these elements should be reinforced.
  - ⇒ The strongest perceptions of NZ 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.

## 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,
  - ⇒ Traditional media such as TV or print advertising, or possibly PR (maybe sponsored TV shows) will be a more effective way to reach secondary school 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**

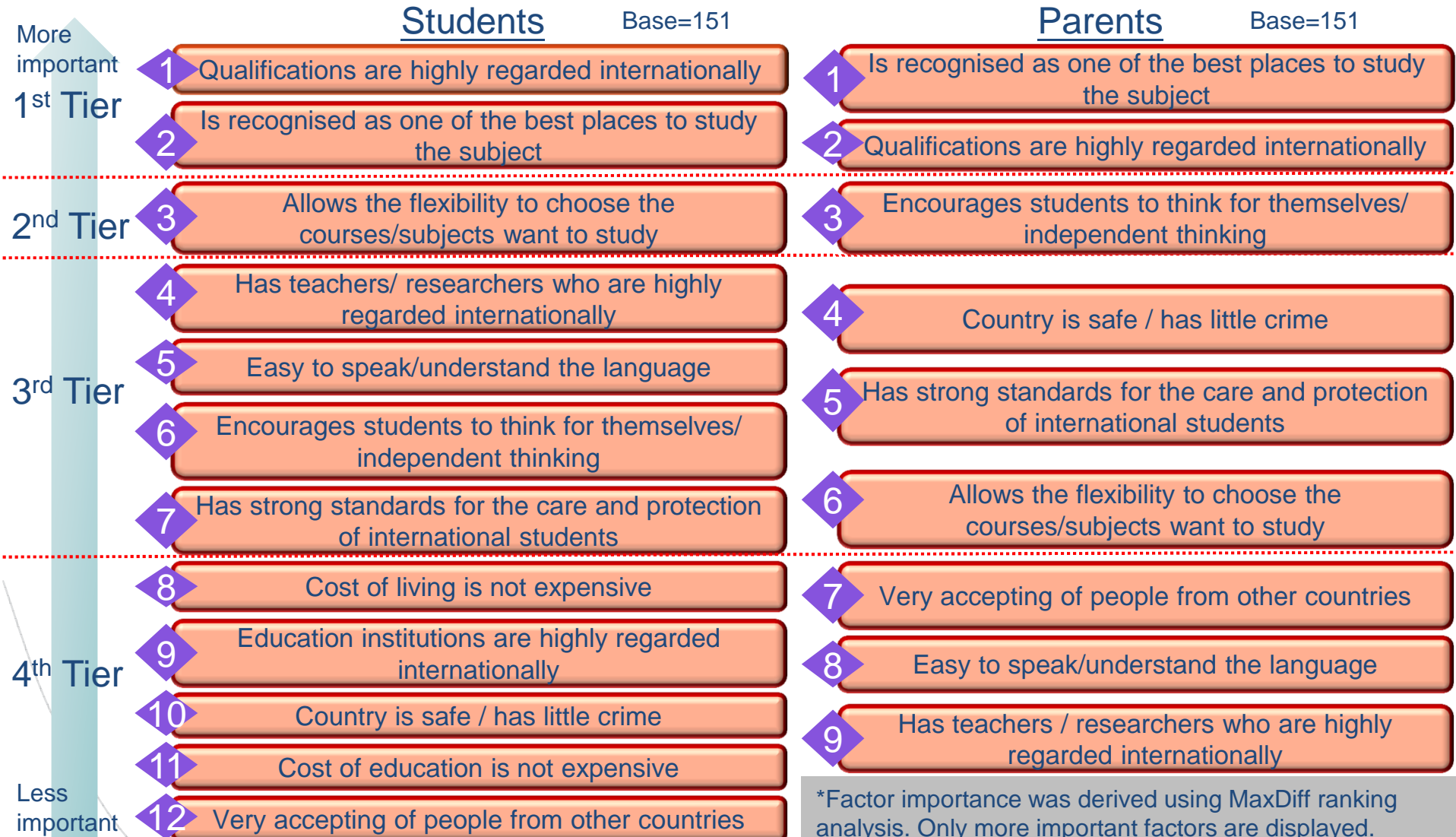
- Importance of Factors in Country Choice**

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



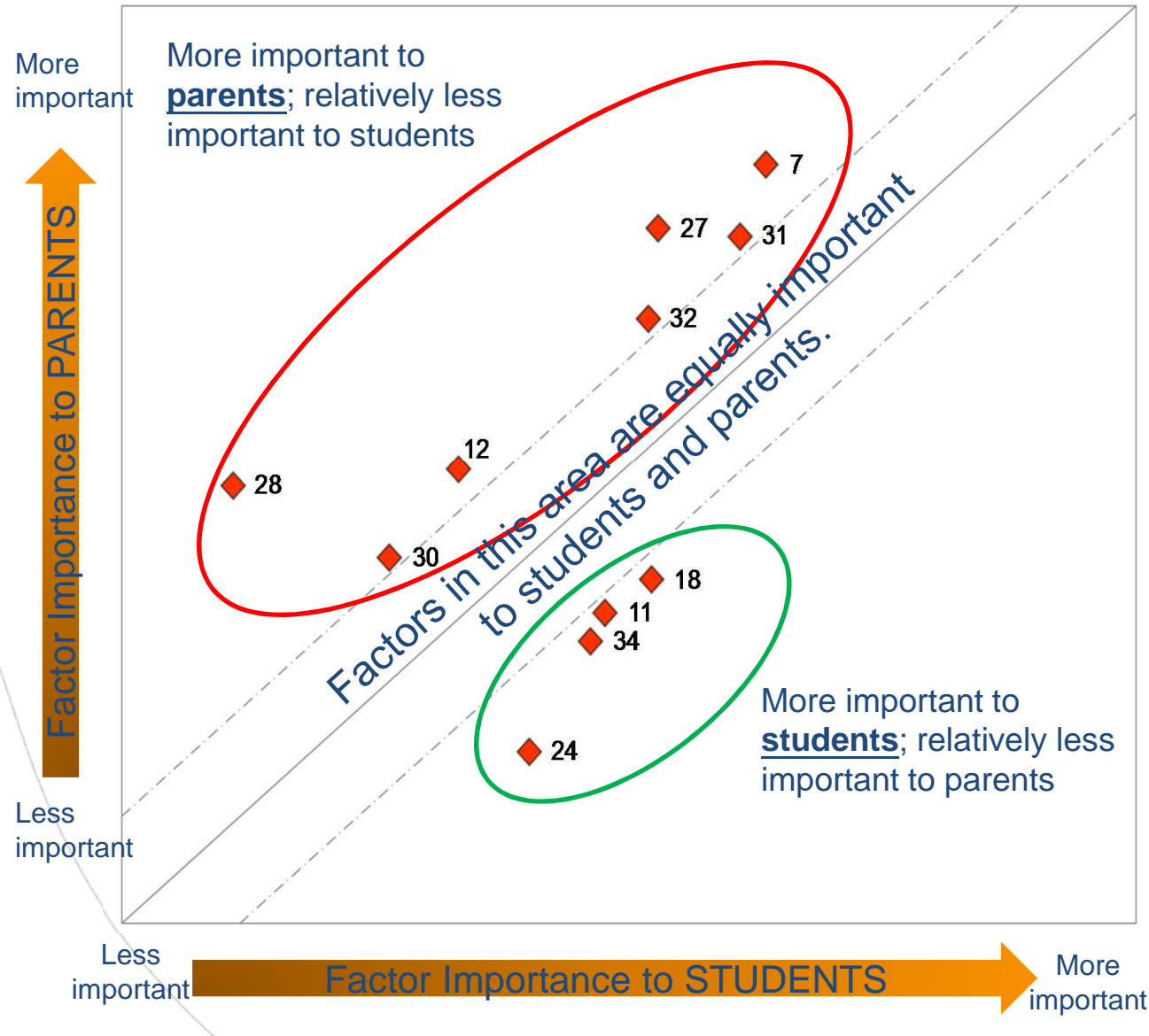
Base:  
Q9:

All Respondents  
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

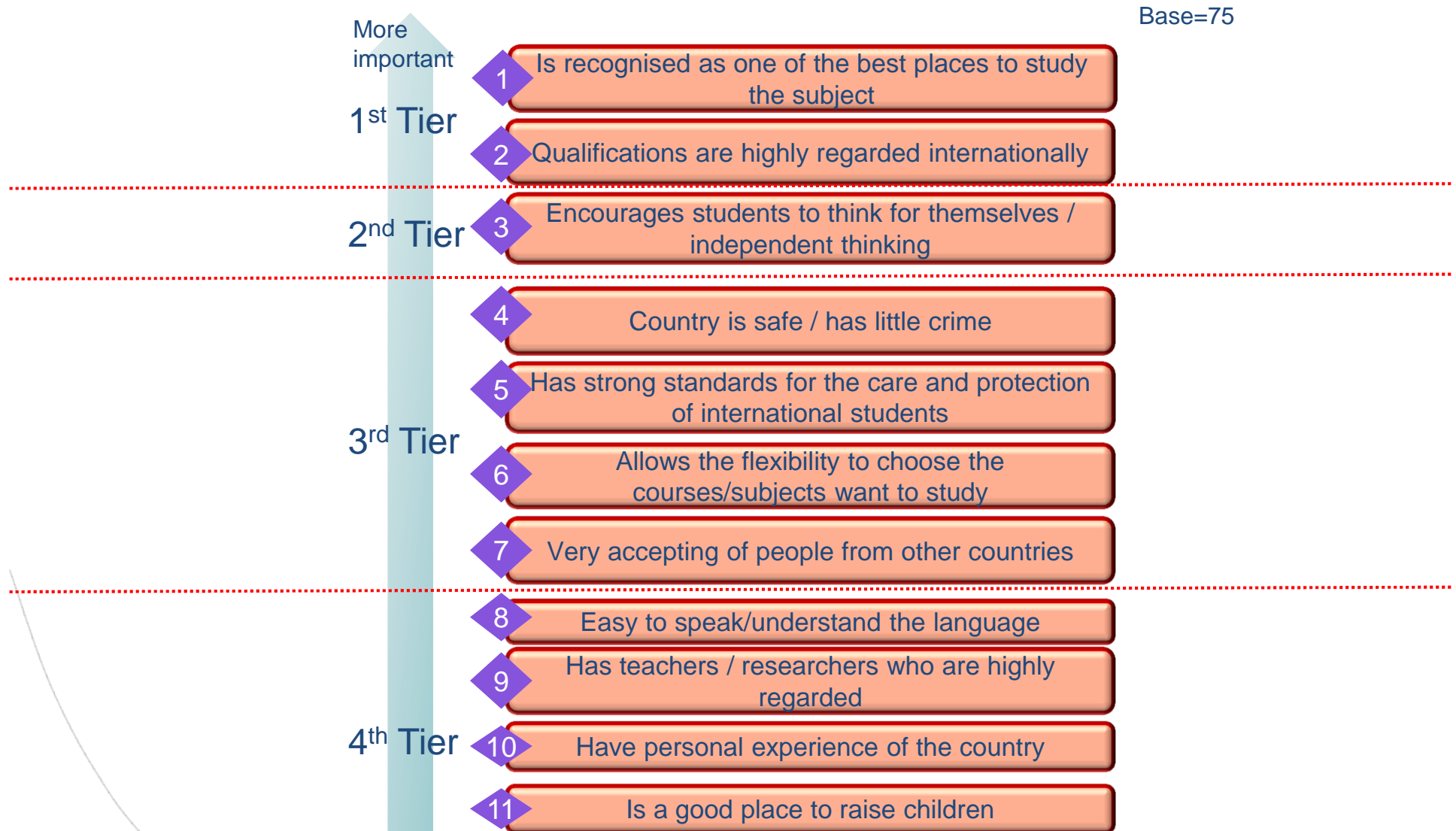


- |    |   |
|----|---|
| 7  | Education system encourages students to think for themselves (encourages independent thinking)  |
| 11 | Takes less time to complete the qualification want  |
| 12 | I have personal experience of the country   |
| 18 | Cost of education is not expensive  |
| 24 | Allowed to work part-time in the country while studying   |
| 27 | Country is safe / has little crime  |
| 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                                       |



For parents of potential secondary school students, *students' care and safety*, and *being accepted in the country* were still important factors.

## Most Important Factors in Country Choice – Secondary School Parents



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**

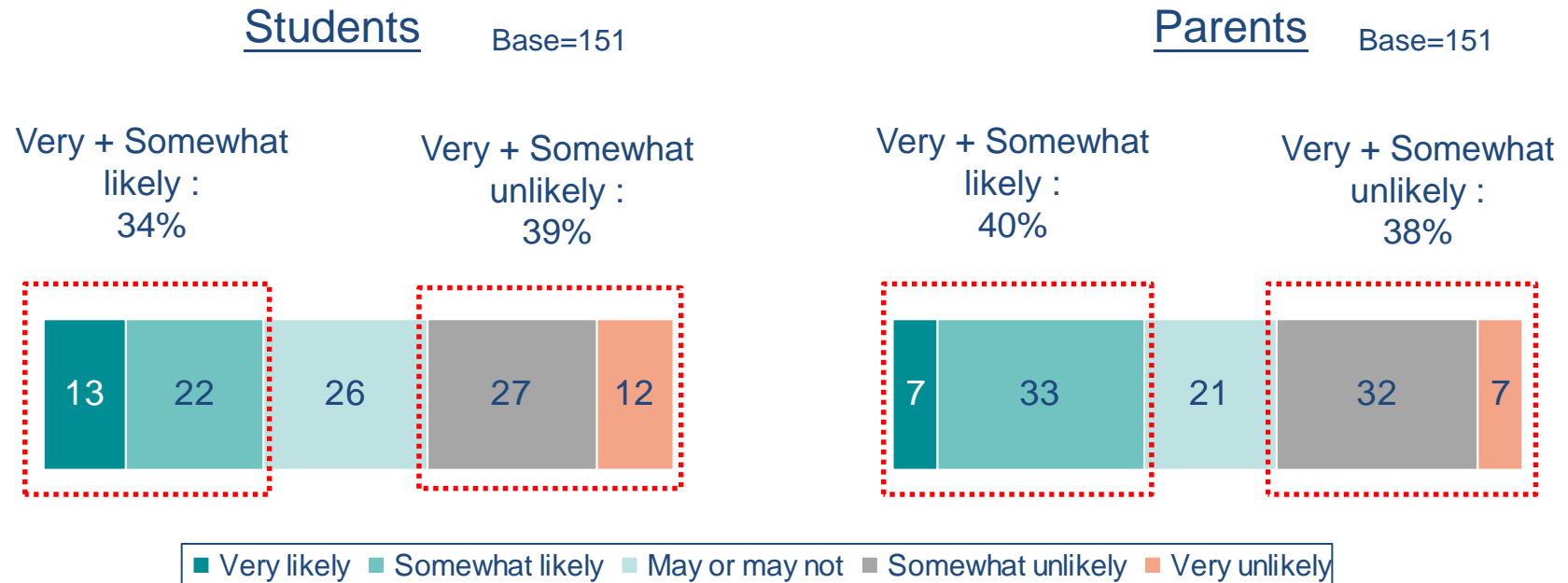
Potential students and  
Parents





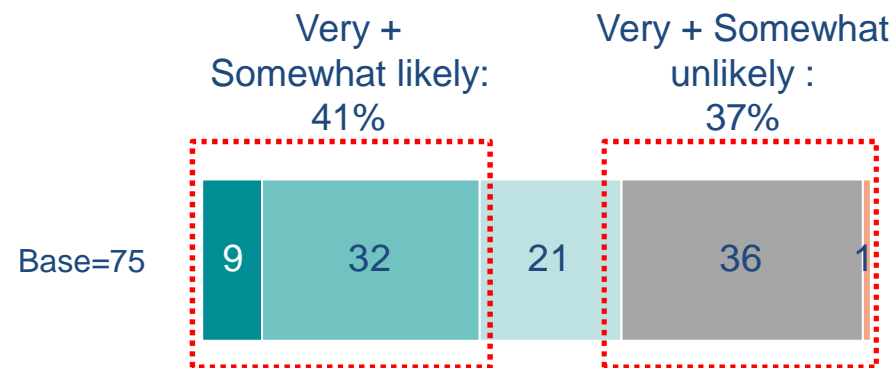
Increasing students and parents' consideration of NZ as a place of study is strongly required. For both students and parents, the acceptance level was matched by the extent of rejection.

## Likelihood of Considering Studying in New Zealand



The likelihood of considering studying in NZ among parents of secondary school students was on par with general parents.

## Likelihood of Considering Studying in New Zealand – Secondary School Parents



■ 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 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>			<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?

*Lack of familiarity with NZ as a place of study* was the common key barrier to consider studying in NZ, including parents of secondary school students.

## Motivators and Barriers to Considering Studying in New Zealand – Secondary School 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	44	✓ Country is safe/has little crime	15*
	57	✓ Cost of living is affordable/not expensive	40
✗ Don't know anyone living or studying there/have not lived or studied there	34	✓ Is a good place to raise children/Children will not learn bad behaviours or bad hobbies	33
✗ Friends/family recommend not going there	18	✓ Is a good place to raise children/Children will not learn bad behaviours or bad hobbies	27
✗ Education institutions do not have a good reputation	14	✓ Many Taiwanese people live or study there	20
✗ Not many Taiwanese people live or study there	14	✓ Cost of education is affordable/not expensive	20
✗ The country is not the best places to study the subject interested in	7	✓ Friends/family recommend it	7
		✓ Easy to be accepted in educational institutions	7
		✓ Yourself/friends/family live or study there/have lived or studied there	7
		Only mentioned by >10% (among total) are shown	

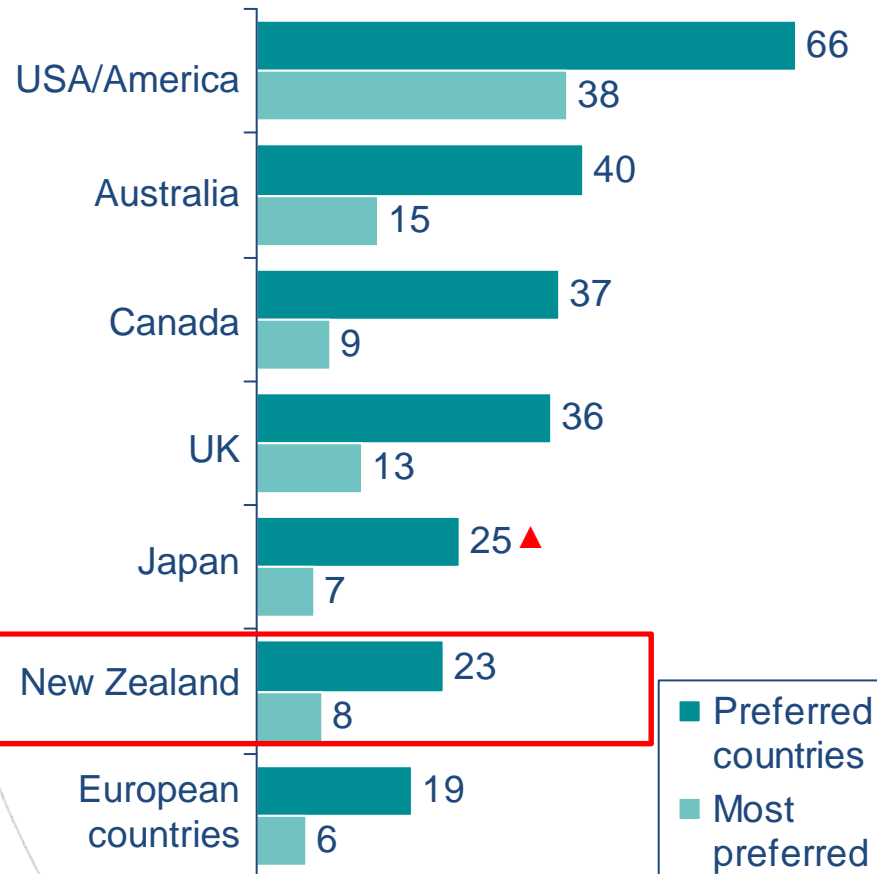
Base: Those who were somewhat unlikely or very unlikely to consider studying in NZ  
 Q8: For what reasons would you not consider studying in New Zealand?  
 Base: Those who didn't prefer NZ but were likely to consider studying in NZ  
 Q7: For what reasons would you consider studying in New Zealand?

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

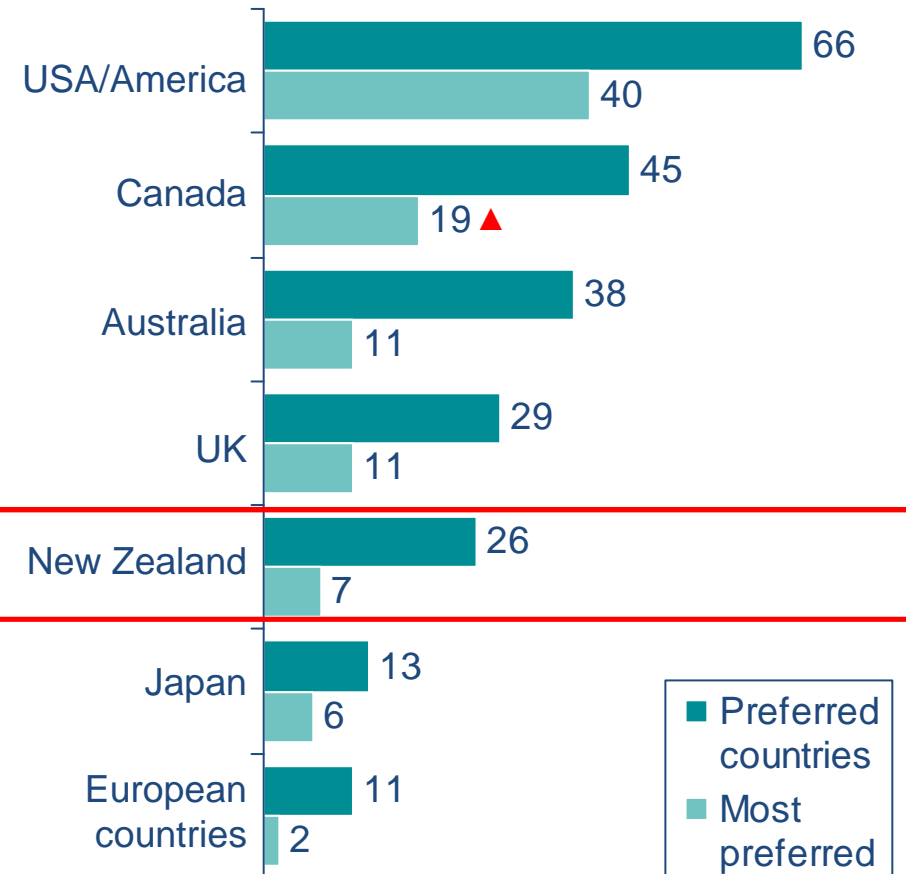
### Students

Base=151



### Parents

Base=151



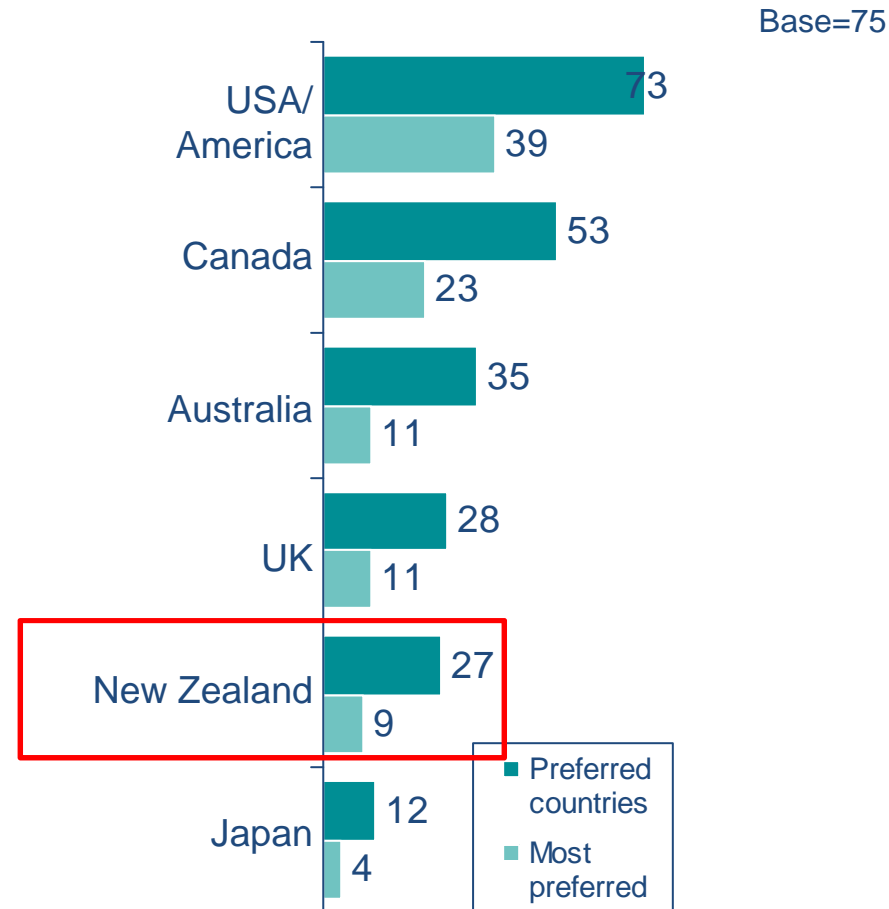
▲ denote significantly higher at 95% confidence level, comparing Students and Parents

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 secondary school parents, their preference toward NZ was on par with UK and close to Australia.

## Preferred Destination Study Countries – Secondary School Parents



Base:  
Q1:  
Q2a:

All respondent  
Which countries are you currently considering studying or training in?  
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.

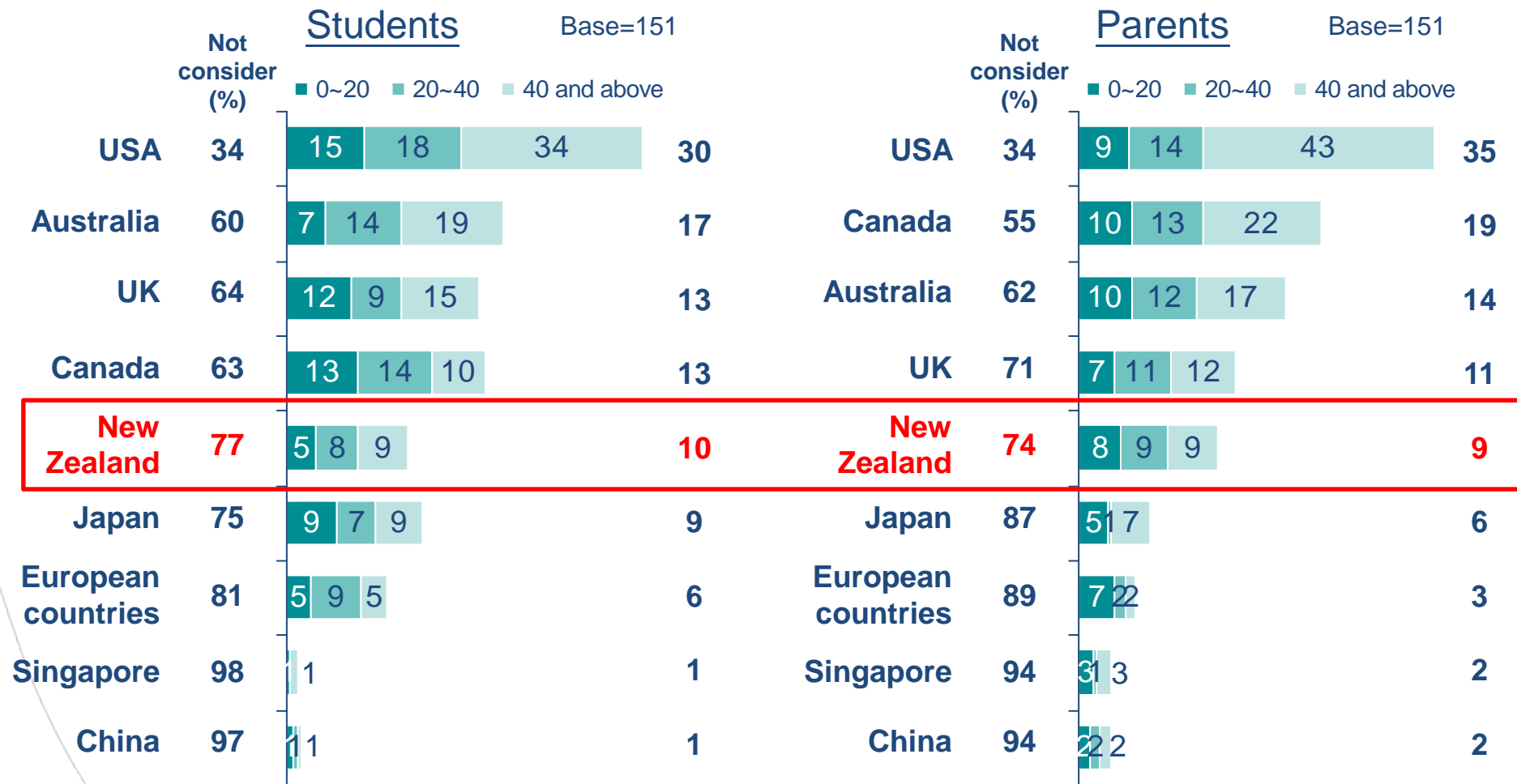




NZ's brand equity was similar among both students and parents, with *a lack of consideration* being the key contribution to weak brand equity. Increasing knowledge of NZ as a place of study is required to lift consideration of studying in NZ.

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			Base			Base
<Environments>	65	45	<Environments>	24	25	<Environments>	6
✓ Good environment/ beautiful natural scene	75	73	✓ Is a good place/ suitable place for learning the language	71	64	✓ Good environment/ beautiful natural scene	100
✓ Is a good place/ suitable place for learning the language	28 ▲	4	✓ Country has a wide range/diversity of people and cultures	29	8	✓ Good climate	50
✓ Has more job vacancies/ easy to find jobs/part-time works/ intern jobs	15	13	✓ Many Chinese people live in the country	25	12	<Cost>	33
✓ Country has a wide range/diversity of people and cultures	14	9	✓ People in the country are very accepting of people from other countries	17	12	✓ Cost of living/study is affordable/not expensive	33
✓ Country is safe/has little crime	11	9	<Schools/ Qualifications>	54	40		
✓ Familiar with the language/ culture/ Can speak the local language	6	18 ▲	✓ 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

▲ 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?

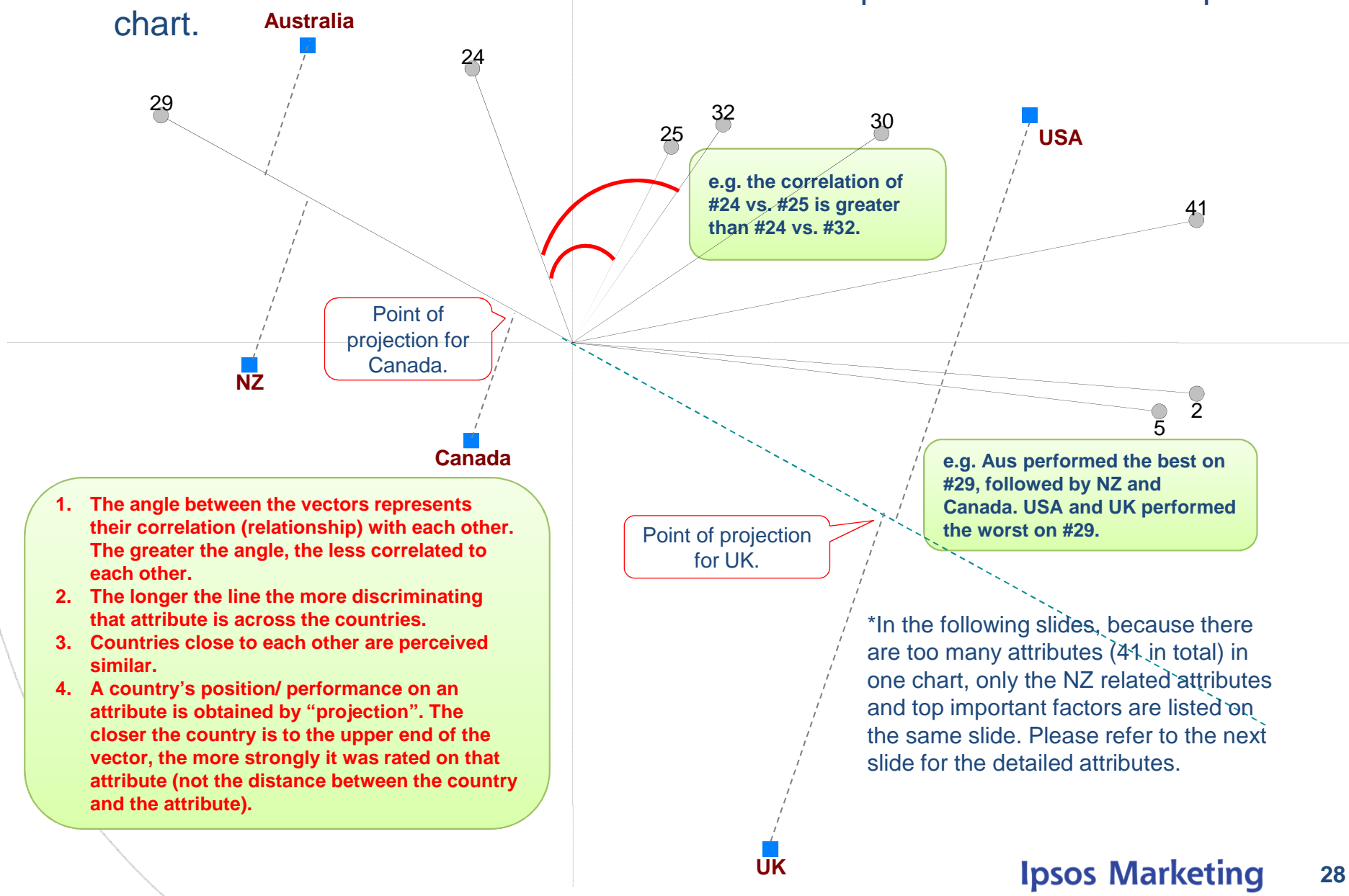
# **Key Findings**

## **- 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.

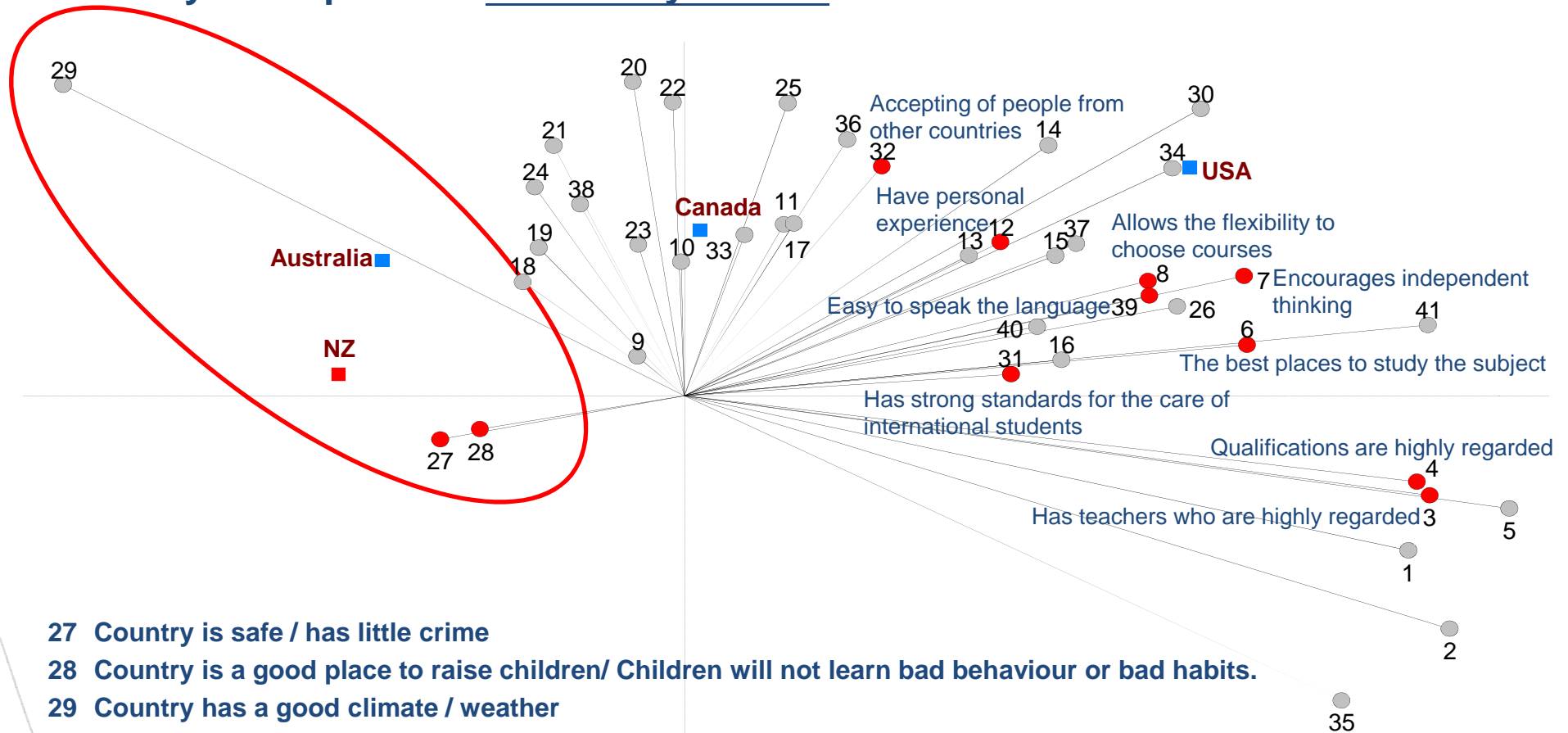


## Detailed attributes used in the biplots

- 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

For secondary school parents, NZ was *safe, good for raising children and with good climate/weather*.

## Country Perceptions – Secondary School Parents



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

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

\* Red highlighted attributes are top important ones for parents.

For secondary school parents, *qualification* was the main driver for preference across countries.

## Reasons for Preferring a Country – Secondary School Parents

	USA/ America	Canada	Australia	UK	New Zealand
Base	54	39	23	19	16
✓ Qualifications are internationally recognised	59	51	57	79B	75
✓ Yourself/friends/family live or study there/have lived or studied there	59	51	52	53	50
✓ The country is recognised as one of the best places to study the subject you're/ your child is interested in	54	44	48	74B	44
✓ Friends/family recommend it	50	64	57	58	69
✓ Education institutions have good reputation	50	51	65	68	69
✓ Many Taiwanese people live or study there	33	33	48	32	56
✓ Easier to speak the language	31	18	22	37	31
✓ Country is safe/has little crime	31	28	48	32	50
✓ People in the country are very accepting of people from other countries	28	13	26	21	31
✓ Is a good place to raise children/Children will not learn bad behaviours or bad hobbies	28	26	30	21	50
✓ Easy to be accepted in educational institutions	24	26	26	37	50A
✓ Can work in the country after studying	22B	5	26B	16	19
✓ Cost of living is affordable/not expensive	20	28	22	16	38
✓ Takes less time to complete the qualification	20	23	22	11	25
✓ Close to Taiwan	15	8	13	11	19
✓ Cost of education is affordable/not expensive	11	21	30A	11	38A
✓ Easy to be allowed in the country/get a visa	9	15	13	16	31A
✓ Education agents recommend it	9	13	17	11	31A

\*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

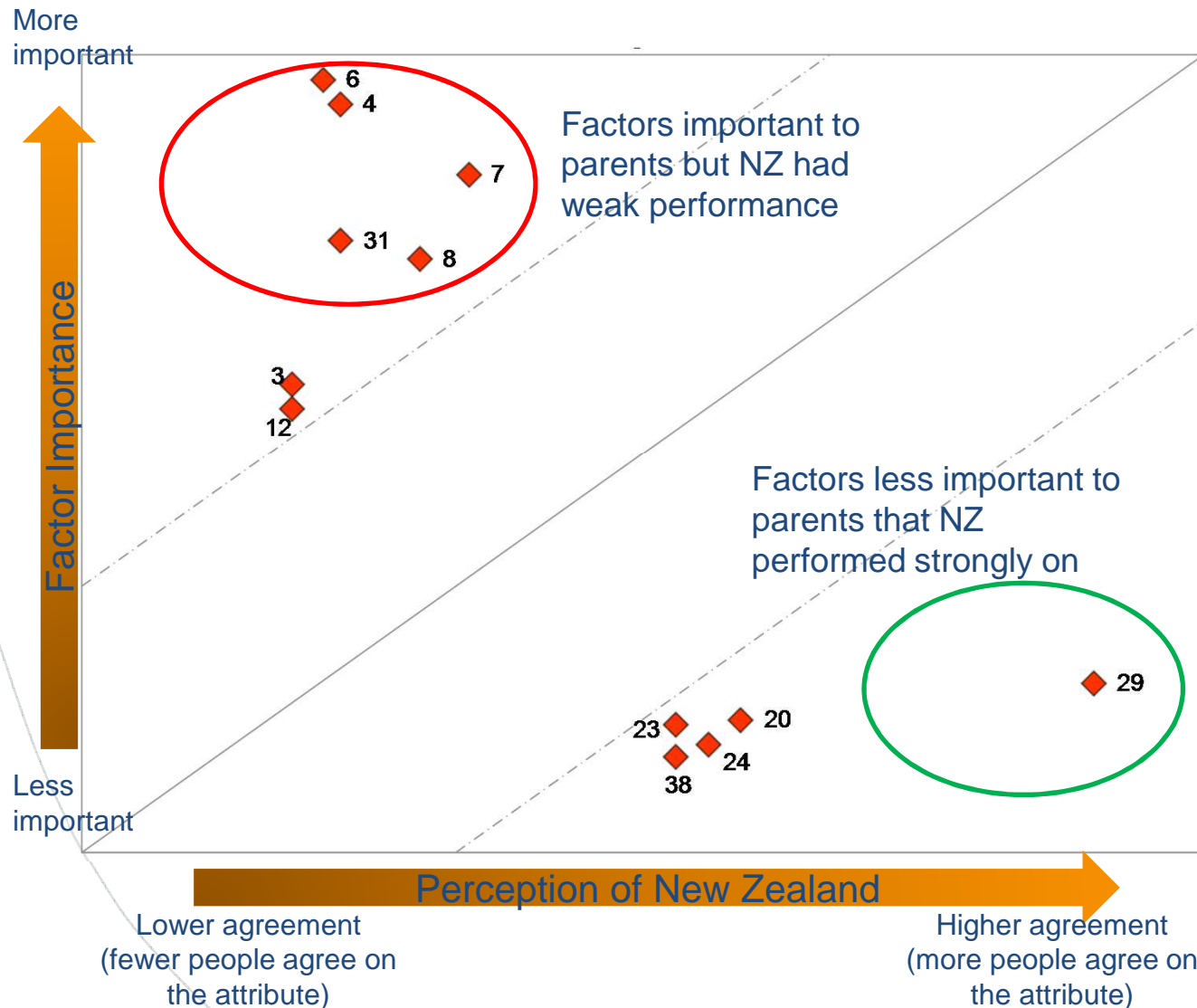
Base:  
Q6:

All respondents

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

*Qualification and specialty of the institution* were the areas to improve for NZ among secondary school parents, since they are poorly linked with NZ while they were the key concerns when considering a country to study in.

## Factor Importance vs. Perceptions of NZ – Secondary School 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
12	I have personal experience of the country
20	Easy to be allowed in the country /get a visa
23	Easy to travel to/from Taiwan
24	Allowed to work part-time in the country while studying
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**

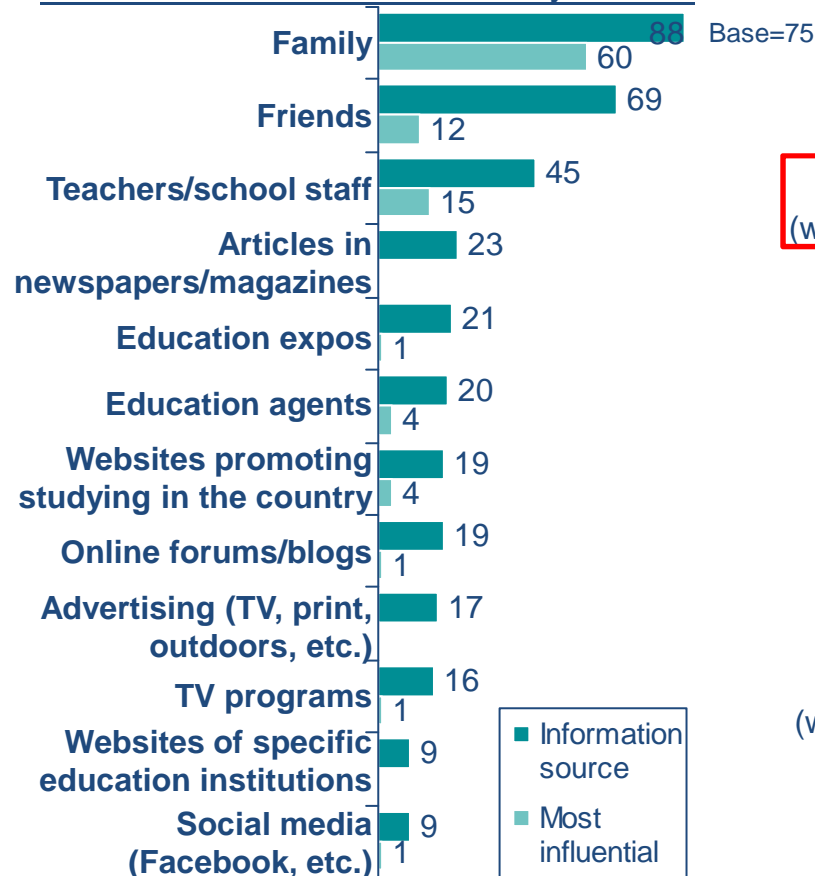
- Information Sources and Communication Perceptions**

Potential students and Parents

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

## Information Sources for Country Choice – Secondary School 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

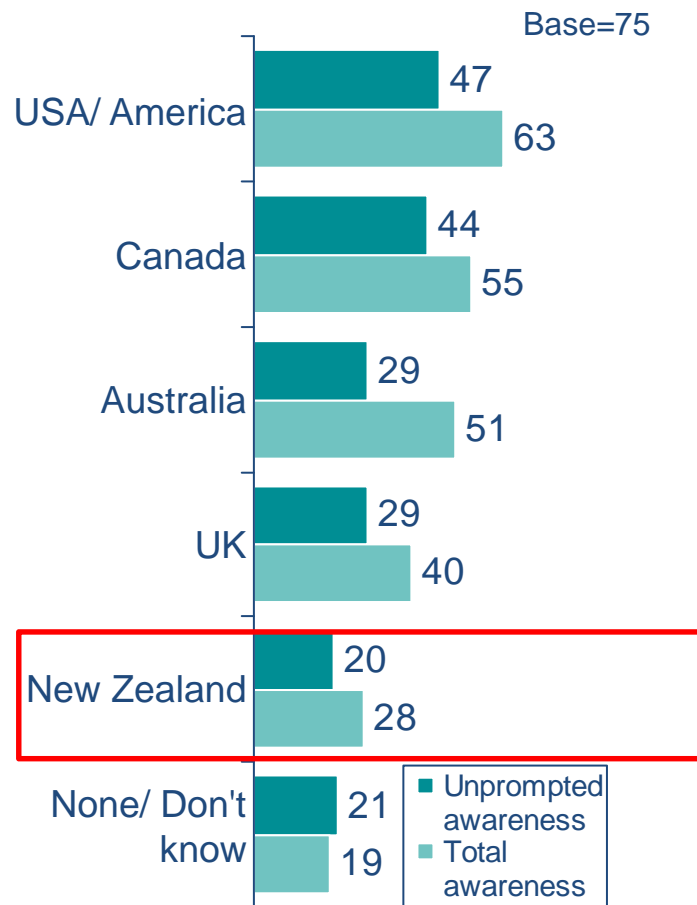


**Base:** All respondent,  
**Q11a:** Have you ever visited any of these websites?

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

## Awareness of Country-Specific Promotions – Secondary School Parents

Awareness of Country-Specific Promotions



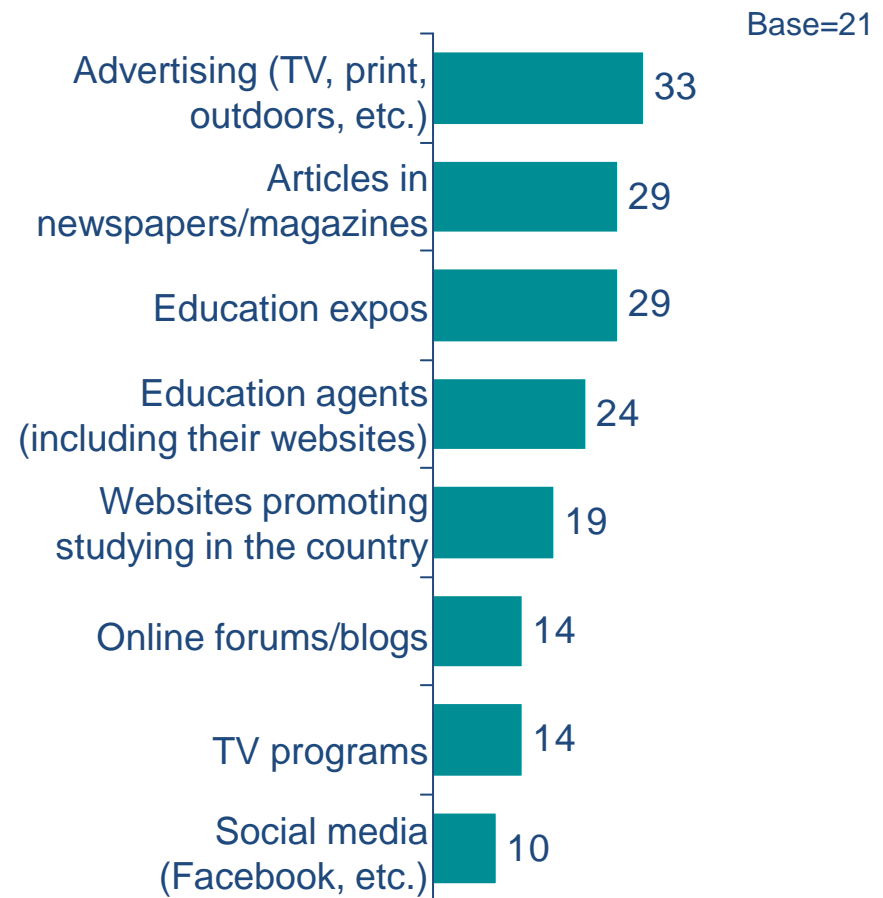
Base:  
Q13:

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 works and country/ school information were the key message take-out from the NZ advertising for secondary school parents.

## Information Received from New Zealand Advertising – Secondary School Parents

	<i>Base</i>	<i>21</i>
✓ Allows work part-time		19
✓ Instructions of schools/subjects		14
✓ Instructions of the culture/ environment of this country		14
✓ Beautiful natural scene		14
✓ Has small classes		14
✓ Cost of living/study is affordable/not expensive		10
✓ Less crimes/safe		10
✓ Good environment for studying		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 – Secondary School Parents

## Most Important Factors

Rank	Attribute	Score
1	The country is recognised as one of the best places to study the subject interested in	5.83
2	Qualifications are highly regarded internationally	5.64
3	Education system encourages students to think for themselves (encourages independent thinking)	5.11
4	Country is safe / has little crime	4.67
5	Has strong standards for the care and protection of international students	4.61
6	Allows the flexibility to choose the types of courses/subjects want to study	4.47
7	People in the country are very accepting of people from other countries	4.26
8	Easy to speak/understand the language	3.69
9	Has teachers / researchers who are highly regarded internationally	3.53
10	I have personal experience of the country	3.35
11	Country is a good place to raise children/ Children will not learn bad behaviour or bad habits.	3.16

## Less Important Factors

Rank	Attribute	Score
12	Is a technologically advanced country	2.96
13	My friends/family recommend it	2.92
14	Easy to be accepted in educational institutions in the country	2.87
15	Cost of living is not expensive	2.76
16	Education institutions are highly regarded internationally	2.71
17	Is a very convenient place to live	2.53
18	Has a lively, exciting lifestyle	2.39
19	Many Taiwanese people live or study there	2.25
20	Easy to be allowed to stay in the country after studying	2.11
21	Has friendly homestay families	2.07
22	Cost of education is not expensive	1.99
23	Country has a wide range/diversity of people and cultures	1.89
24	Academic requirements are not too strict	1.88
25	Takes less time to complete the qualification you/ your children want	1.81
26	Is a country internationally recognised as being innovative	1.81
27	Easy to get information about studying in the country	1.69
28	School teachers / school advisors recommend it	1.53

## Least Important Factors

Rank	Attribute	Score
29	Easy to get a scholarship	1.41
30	Country has a good climate / weather	1.29
31	Has a formal alumni network that allows you/ your children to easily maintain contact with fellow students	1.27
32	Education institutions are historic / have a long history	1.19
33	Has a long history / culture	1.16
34	The number of tests required for each course is relatively few	1.11
35	Famous/highly regarded people have studied in the country	1.11
36	Easy to be allowed in the country / get a visa	1.01
37	Easy to travel to/from Taiwan	0.98
38	Allowed to work part-time in the country while studying	0.83
39	Education agents recommend it	0.75
40	Country has a wide range of outdoor/adventure activities available	0.74
41	Has relatively small class sizes (small number of students per class)	0.68

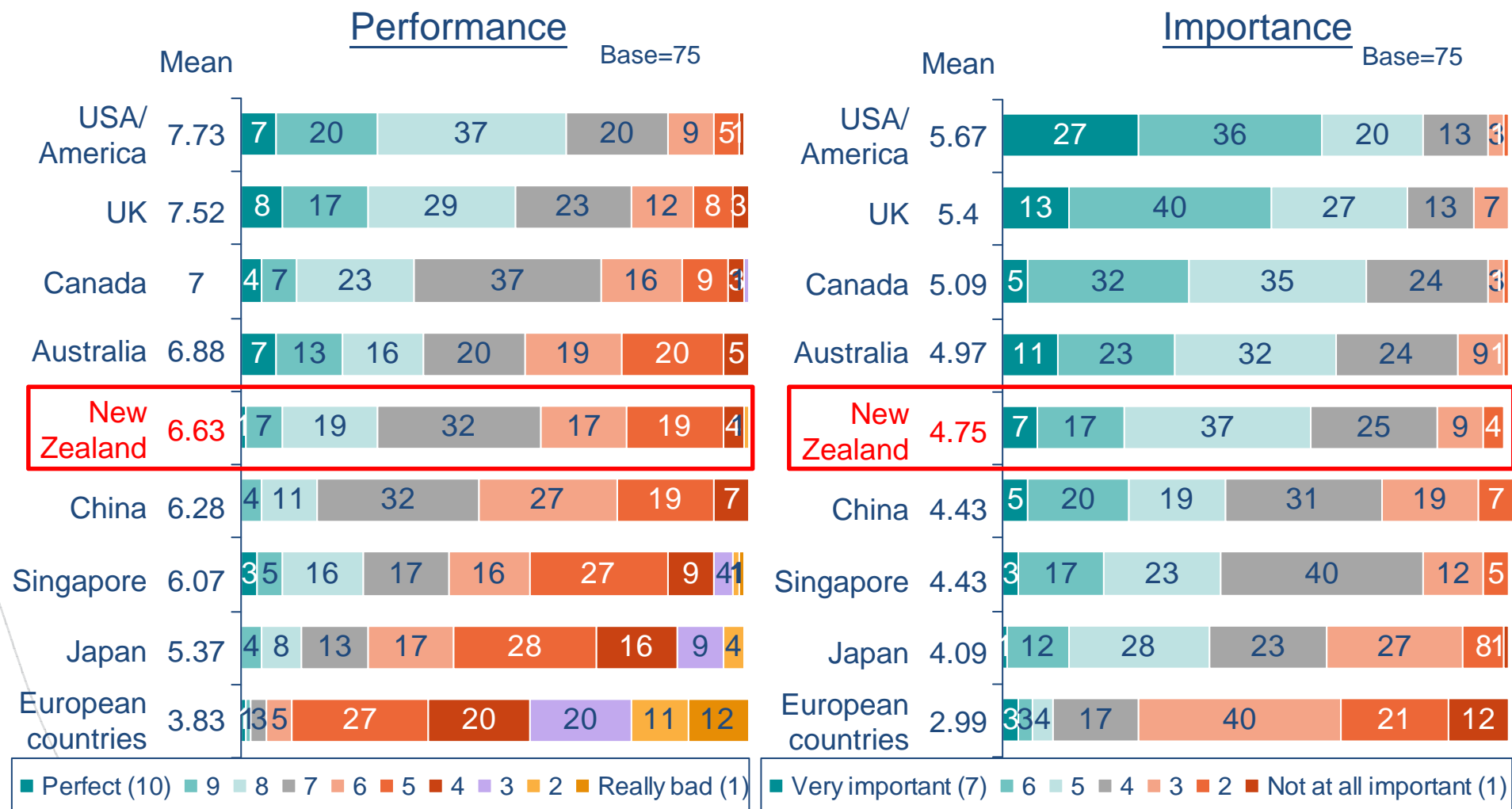


# **Appendix**

- Detailed Results of Country Importance and Country Performance**

Potential students and Parents

## Performance and Importance – Secondary School Parents by Country



# **Appendix**

## **- Detailed Results of Country Perceptions**

Potential students and  
Parents

## Detailed Country Perceptions – Secondary School Parents (attributes 1-15)

	NZ	UK	Canada	USA	Australia
Country has a good climate/weather	63	3 ▼	28 ▼	15 ▼	65
Country is safe/has little crime	44	35	37	19 ▼	41
Easy to get information about studying in the country	41	44	53	71 ▲	43
Easy to be allowed in the country/get a visa	41	15 ▼	51	43	43
Country is a good place to raise children/Children will not learn bad behaviour or bad hobbies	40	35	32	23 ▼	45
Allowed to work part-time in the country while studying	39	17 ▼	25	37	52
Easy to travel to/from Taiwan	37	25	35	40	45
Country has a wide range of outdoor/adventure activities available	37	20 ▼	33	37	48
Easy to be accepted in educational institutions in the country	33	7 ▼	37	37	31
People in the country are very accepting of people from other countries	33	29	51 ▲	59 ▲	41
Cost of living is not expensive	32	4 ▼	17 ▼	17 ▼	20
Academic requirements are not too strict	32	5 ▼	27	27	35
Has a lively, exciting lifestyle	31	23	41	57 ▲	43
Is a very convenient place to live	28	39	55 ▲	68 ▲	32
Easy to speak/understand the language	28	40	44 ▲	71 ▲	24

**Base:** All Secondary parents , n=75  
**Q10:** What countries can apply to the statement?  
**Significant notation:** ▲/▼ denote significant higher/ lower than NZ at 95% confidence level.

## Detailed Country Perceptions – Secondary School Parents (attributes 16-30)

	NZ	UK	Canada	USA	Australia
Cost of education is not expensive	27	5 ▼	19	11 ▼	19
Is a country internationally recognised as being innovative	27	31	24	59 ▲	20
Has relatively small class sizes (small number of students per class)	25	19	24	21	24
Many Taiwanese people live or study there	25	33	60 ▲	81 ▲	33
Education system encourages students to think for themselves (encourages independent thinking)	24	40 ▲	39 ▲	79 ▲	25
Easy to be allowed to stay in the country after studying	24	5 ▼	32	40 ▲	25
Has friendly homestay families	24	19	36	36	32
Allows you the flexibility to choose the types of courses/subjects you want to study	21	39 ▲	48 ▲	68 ▲	27
Education institutions are highly regarded internationally	20	69 ▲	41 ▲	85 ▲	23
Takes less time to complete the qualification you/ your children want	20	13	27	35 ▲	25
The number of tests required for each course is relatively few	19	7 ▼	15	23	21
My friends/family recommend it	19	19	41 ▲	59 ▲	23
Education agents recommend it	19	37 ▲	36 ▲	56 ▲	23
Country has a wide range/diversity of people and cultures	17	28	41 ▲	72 ▲	29
Qualifications are highly regarded internationally	16	61 ▲	40 ▲	84 ▲	21

Base:

All Secondary parents , n=75

Q10:

What countries can apply to the statement?

Significant notation: ▲/▼ denote significant higher/ lower than NZ at 95% confidence level.

## Detailed Country Perceptions – Secondary School Parents (attributes 31-41)

	NZ	UK	Canada	USA	Australia
Has strong standards for the care and protection of international students	16	33 ▲	32 ▲	48 ▲	20
The country is recognised as one of the best places to study the subject you're interested in	15	41 ▲	43 ▲	68 ▲	17
Easy to get a scholarship	15	5 ▼	23	27	12
Has a formal alumni network that allows you/ your children to easily maintain contact with fellow students	15	31 ▲	35 ▲	61 ▲	13
Has a long history/culture	15	72 ▲	35 ▲	68 ▲	13
Has teachers/researchers who are highly regarded internationally	13	57 ▲	37 ▲	79 ▲	12
I have personal experience of the country (visited/lived there before, or have friends or family who have lived or studied there)	13	23	43 ▲	47 ▲	20
Is a technologically advanced country	12	45 ▲	41 ▲	84 ▲	17
My teachers/school advisors recommend it	11	25 ▲	40 ▲	51 ▲	20
Education institutions are historic/have a long history	9	67 ▲	32 ▲	76 ▲	12
Famous/highly regarded people have studied in the country	8	56 ▲	24 ▲	84 ▲	11

**Base:** All Secondary parents , n=75  
**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!**