



Ipsos Marketing

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

Results of Tertiary Students

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. Particularly for intending tertiary students, their likelihood to consider NZ was relatively lower than others.
 - ⇒ Low consideration was 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.
- Same with general students and parents, consideration of NZ among tertiary students 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 tertiary students.
 - ⇒ For both general students or tertiary students, NZ had weak associations with important drivers relating to *qualification and specialty reputation*, contributing to lower consideration of NZ generally.
- For tertiary students, their perception of NZ were similar with general students and parents – *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 strengths (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 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 tertiary 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.

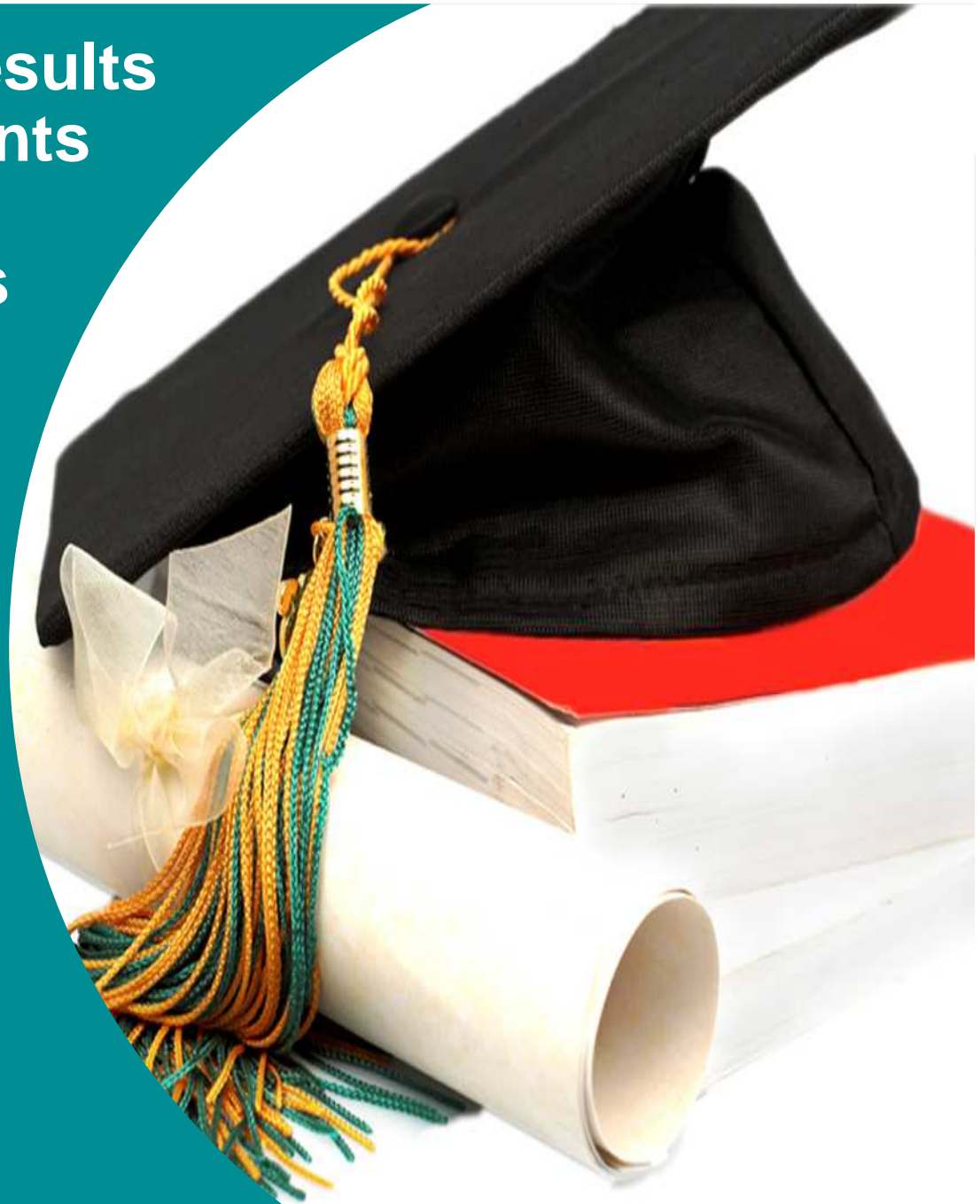
- Research Objectives:

- ⇒ 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

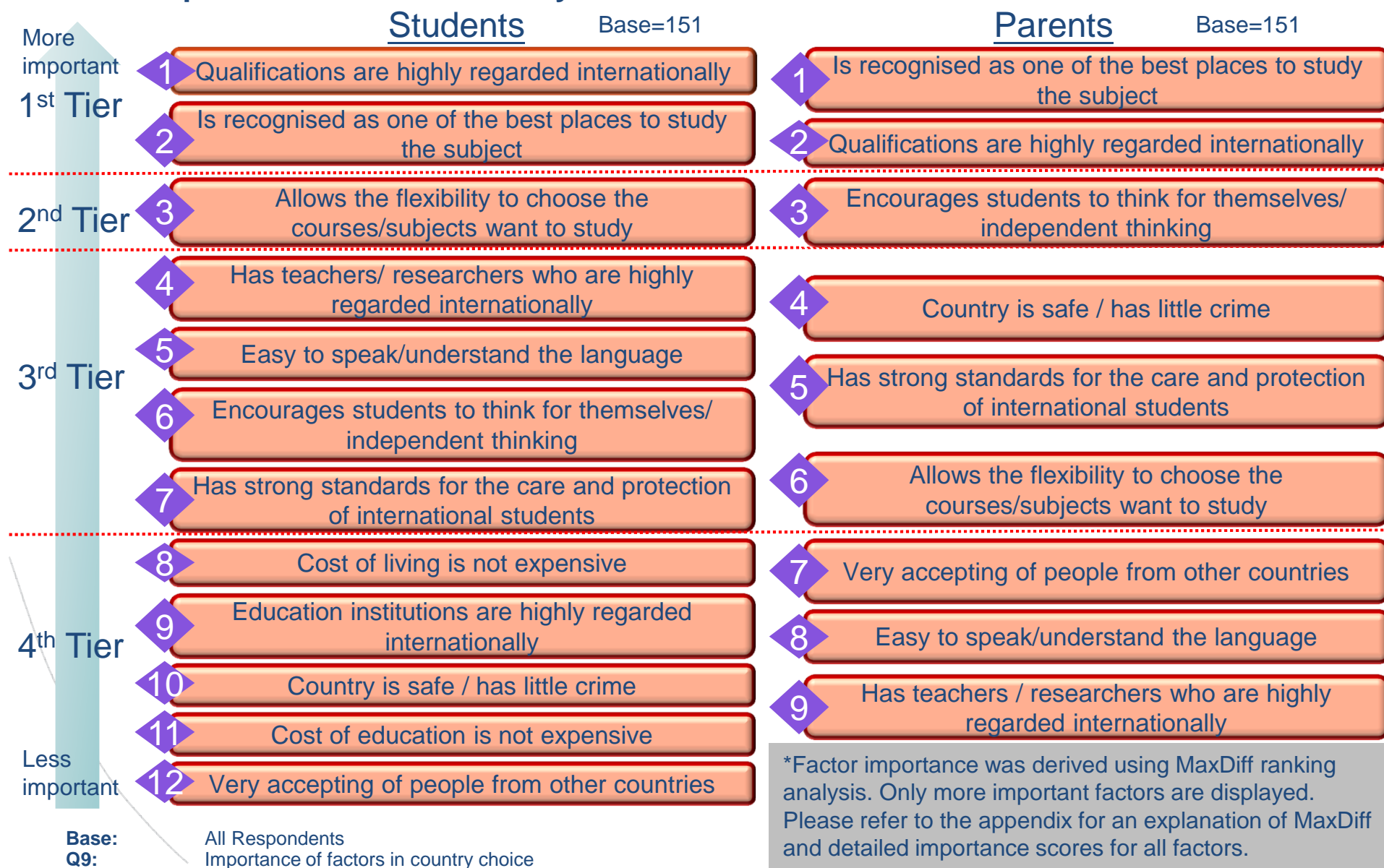
- Importance of Factors in Country Choice**

Potential students and
Parents



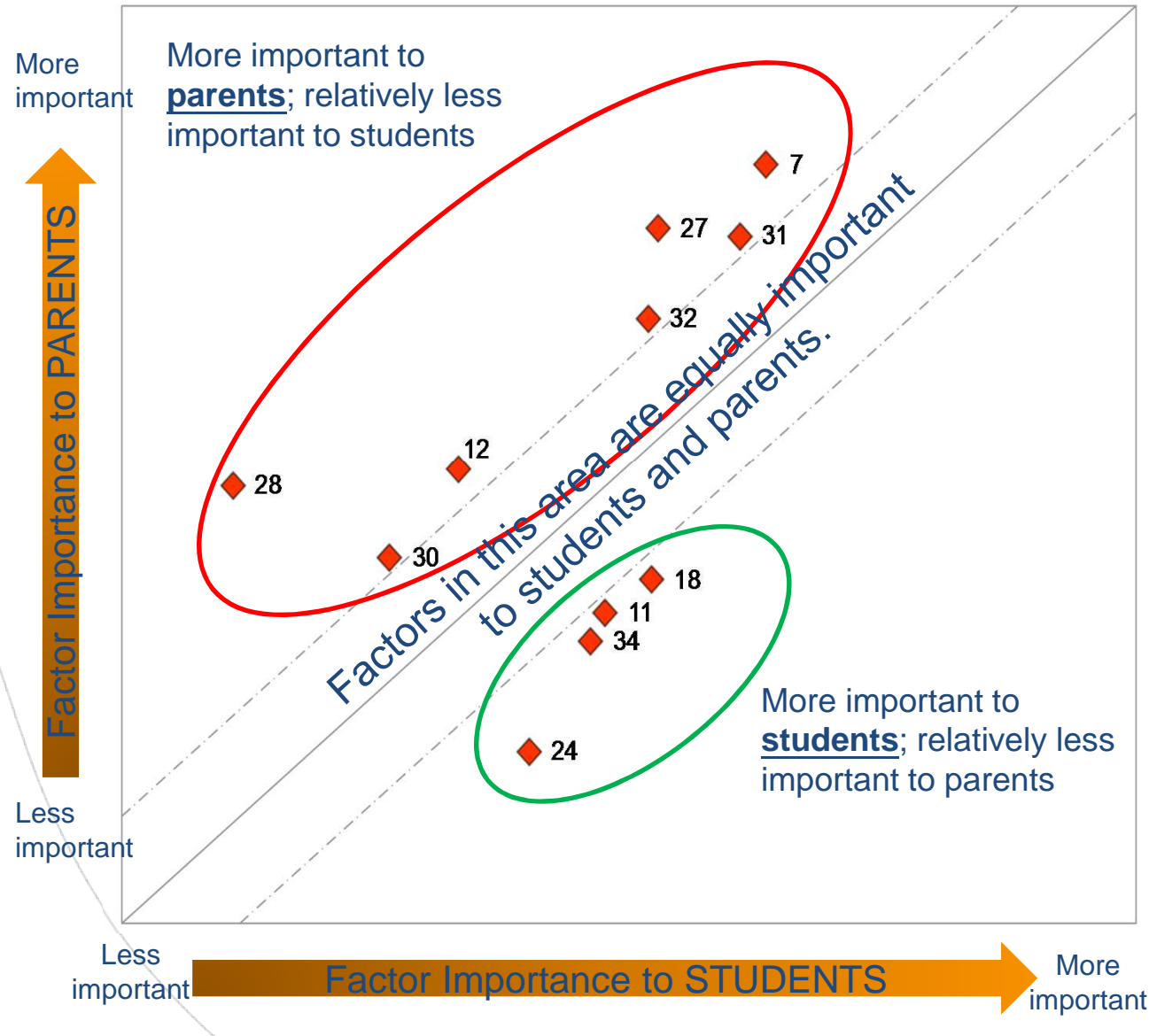
For both students and parents, the most important driver of country choice was the reputation of the intended qualification or place of study.

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

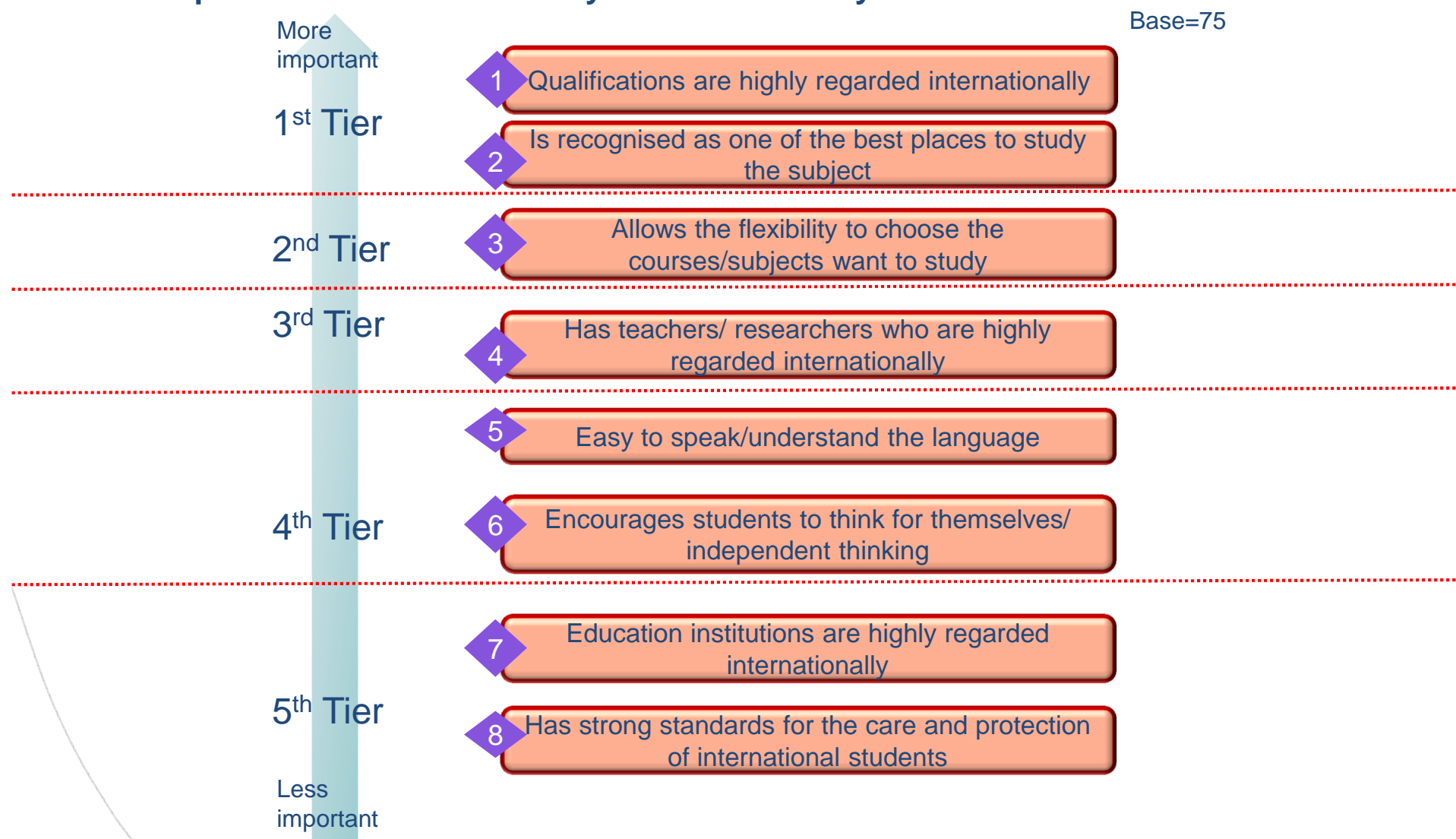


- | | |
|----|---|
| 7 | Education system encourages students to think for themselves (encourages independent thinking) |
| 11 | Takes less time to complete the qualification want |
| 12 | I have personal experience of the country |
| 18 | Cost of education is not expensive |
| 24 | Allowed to work part-time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



Similar with all students, tertiary students considered *academic qualification and reputation* as the most important factors, however, *costs* appeared to be less important to them.

Most Important Factors in Country Choice – Tertiary Students



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

Key Findings

- Country Preference, Evaluation, and Perceptions**

Potential students and Parents

Key Findings

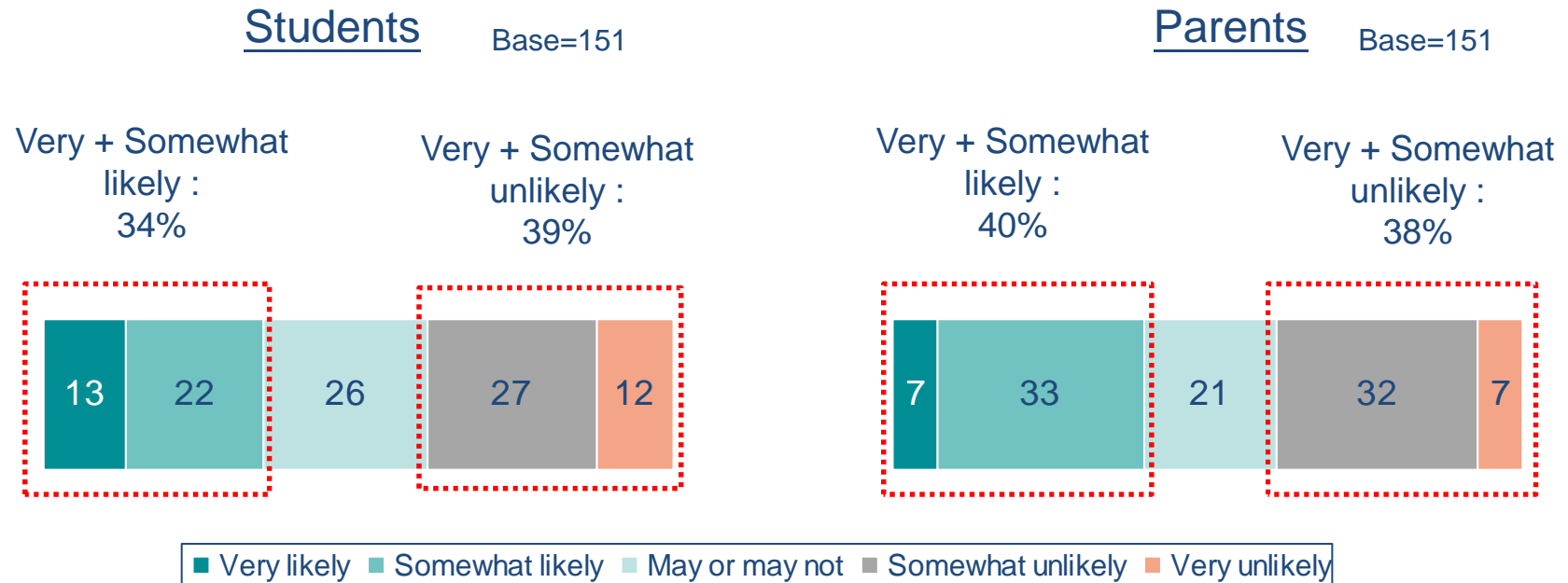
- Country Preference

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.

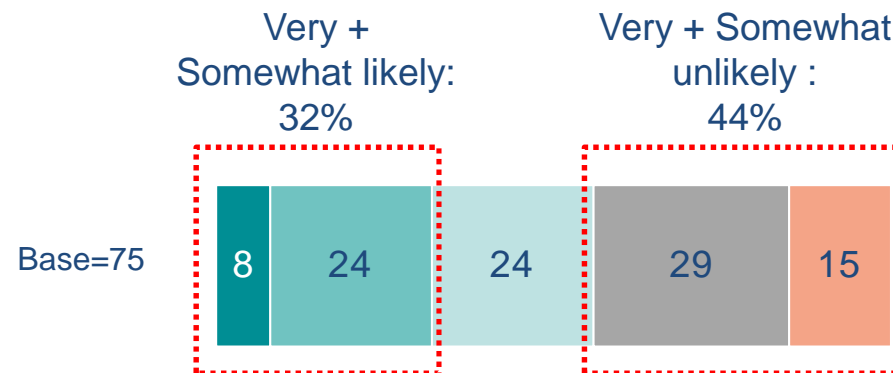
Likelihood of Considering Studying in New Zealand





Compared with all students and parents, intending tertiary students had relatively lower interest in studying in NZ – suggesting a target for improved marketing and communications.

Likelihood of Considering Studying in New Zealand – Tertiary 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?

Same with the general perception, *lack of familiarity with NZ as a place of study* was the key barrier to consider studying in NZ for tertiary students.

Motivators and Barriers to Considering Studying in New Zealand – Tertiary Students

<u>Reasons for NOT Considering Studying in New Zealand</u>		<u>Reasons for Considering Studying in New Zealand</u>	
	Base 51		Base 9*
✗ Don't know enough about New Zealand to consider it	65	✓ Country is safe/has little crime	22
✗ The country is not the best places to study the subject interested in	33	✓ Is a good place to raise children/Children will not learn bad behaviours or bad hobbies	22
✗ Don't know anyone living or studying there/have not lived or studied there	25	✓ Many Taiwanese people live or study there	11
✗ Friends/family recommend not going there	14	✓ Friends/family recommend it	11
✗ Education institutions do not have a good reputation	12	✓ Cost of living is affordable/not expensive	11
✗ Not many Taiwanese people live or study there	10	✓ Easy to be accepted in educational institutions	11
		✓ Cost of education is affordable/not expensive	-
		✓ Yourself/friends/family live or study there/have lived or studied there	-
		Only mentioned by >10% (among total) are shown	

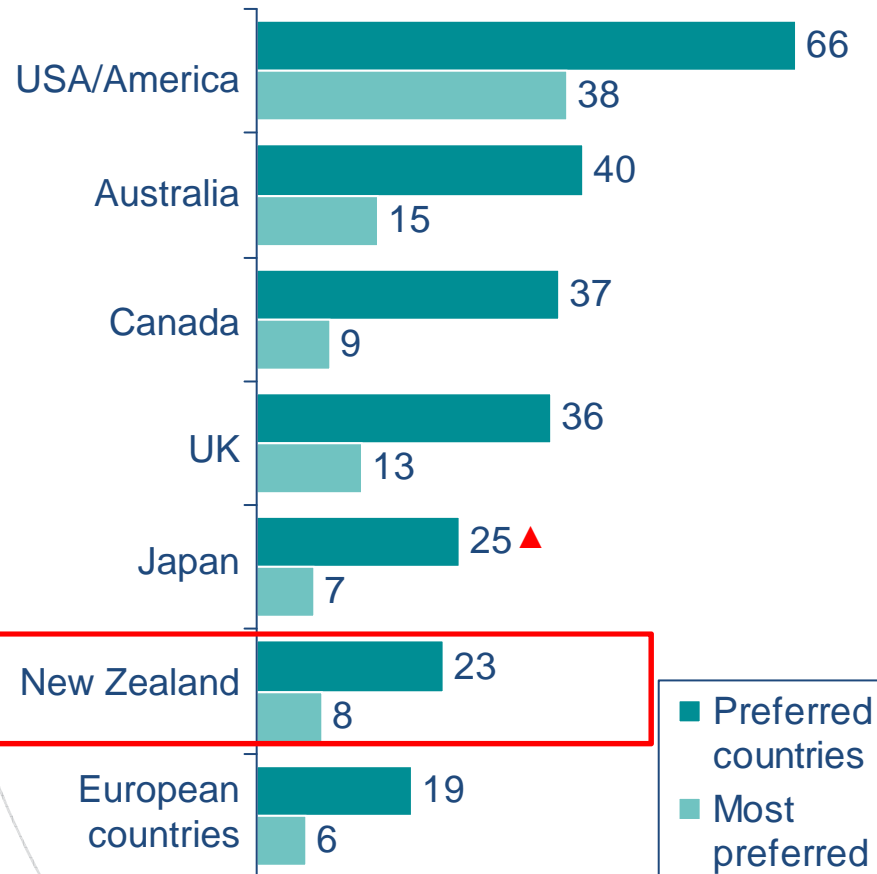
Base: Those who were somewhat unlikely or very unlikely to consider studying in NZ
 Q8: For what reasons would you not consider studying in New Zealand?
 Base: Those who didn't prefer NZ but were likely to consider studying in NZ
 Q7: For what reasons would you consider studying in New Zealand?

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

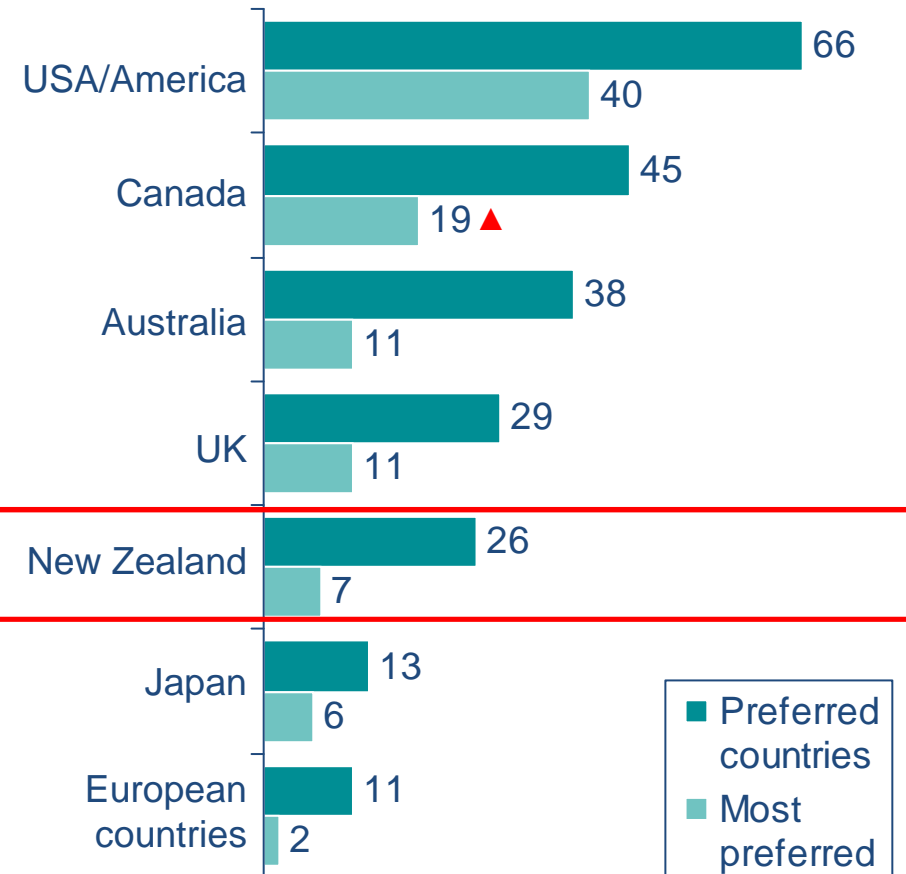
Students

Base=151



Parents

Base=151

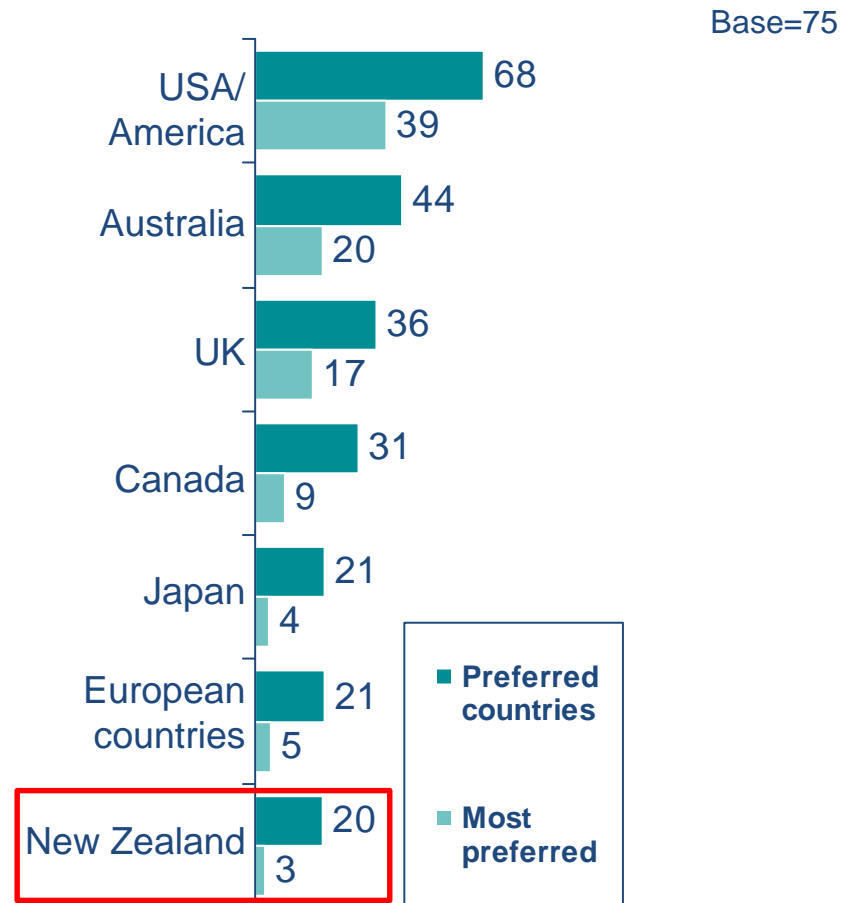


▲ denote significantly higher at 95% confidence level, comparing Students and Parents

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

Consistent with the lower likelihood to consider NZ, intending tertiary students also had the lowest preference for NZ, reinforcing the need to review marketing messages and activities aimed at this group.

Preferred Destination Study Countries – Tertiary 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



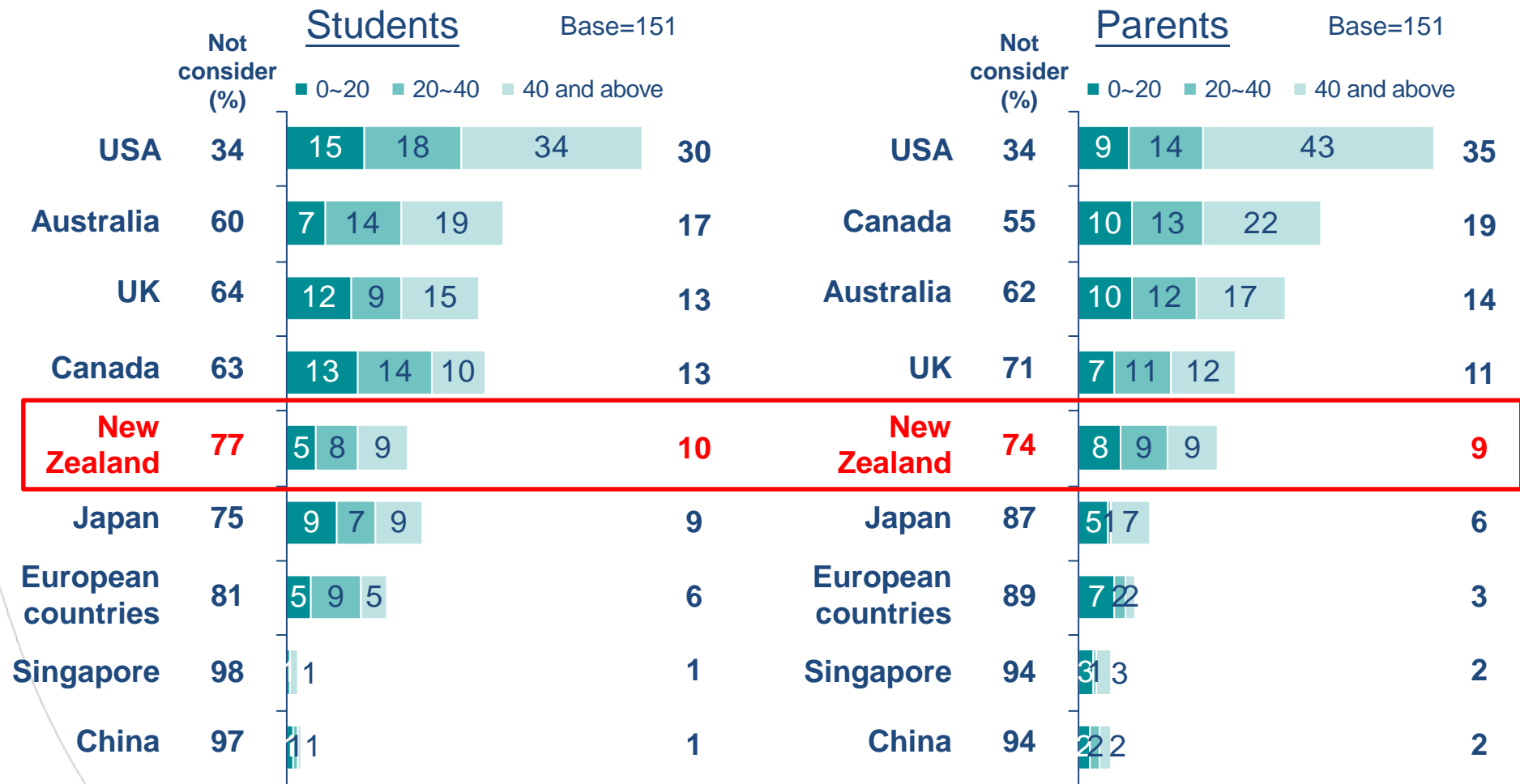
Among the countries, NZ has a "share of mind" 10%. This shows how much people "like" NZ overall, relative to their liking of competitors.



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			USA			New Zealand		
	Students	Parents		Students	Parents		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

▲ 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?

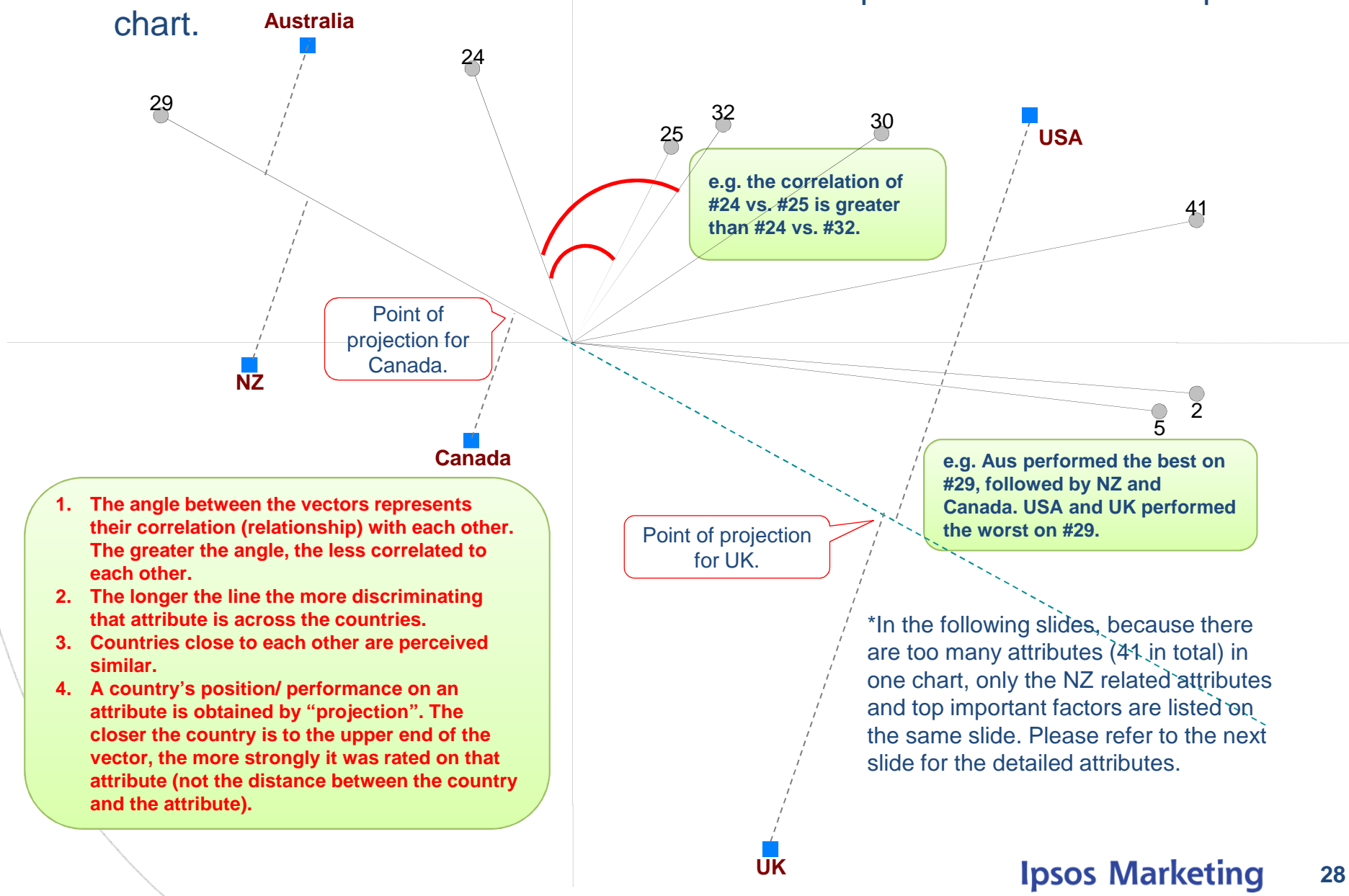
Key Findings

- 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.



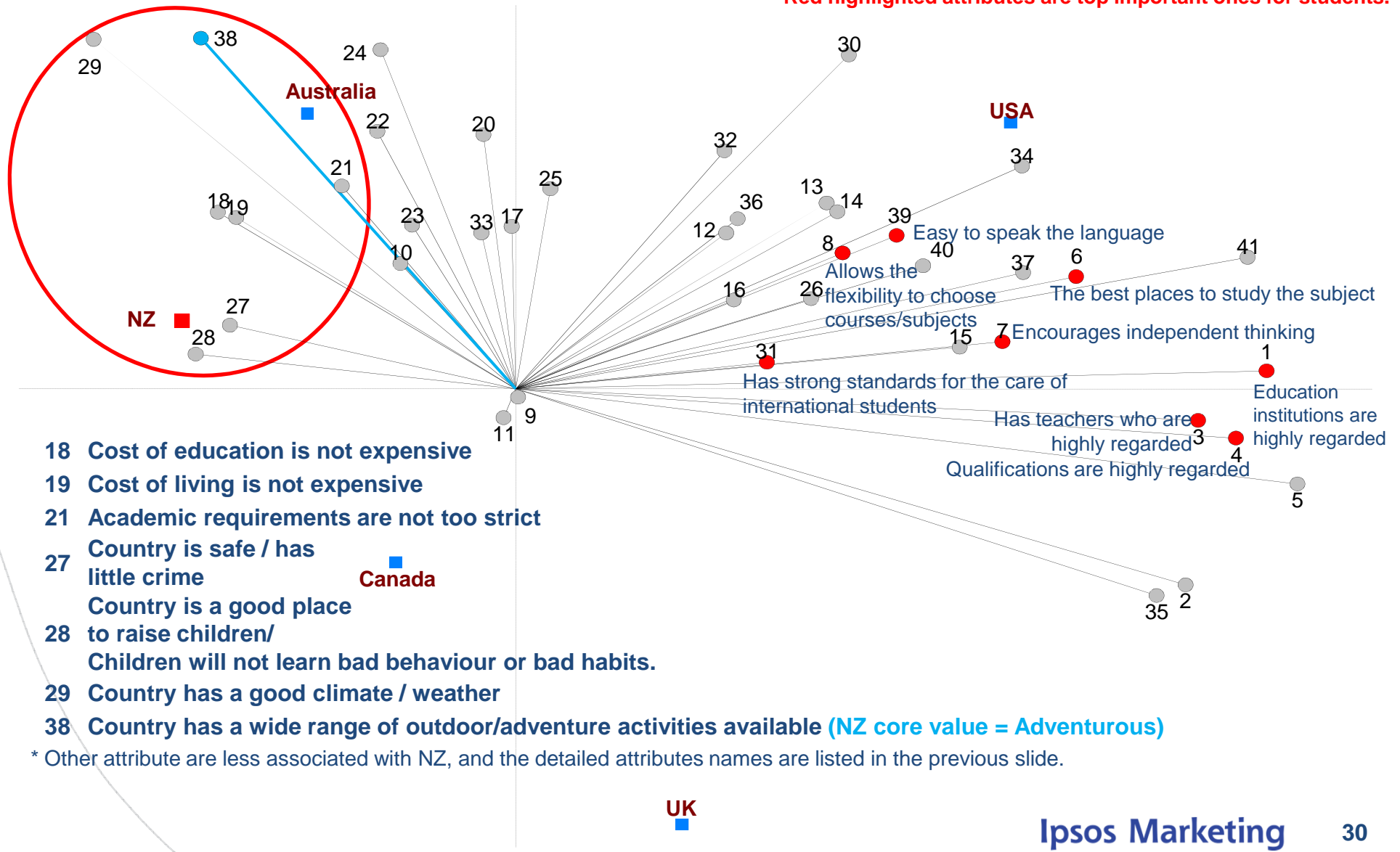
Detailed attributes used in the biplots

- 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

Affordable costs, safe, good weather, and has various of outdoor/adventure activities were the perceptions that tertiary students associated with NZ.

Country Perceptions – Tertiary Students

* Red highlighted attributes are top important ones for students.



Across countries, *academic reputation* was an important driver for intending tertiary students' country choice.

Reasons for Preferring a Country – Tertiary Students

	USA/ America	Australia	UK	Canada	New Zealand
Base	49	30	25	22	15
✓ Education institutions have good reputation	71B	47	80B	73	67
✓ Qualifications are internationally recognised	59	37	64B	59	33
✓ The country is recognised as one of the best places to study the subject you're/ your child is interested in	51	37	60	45	40
✓ Friends/family recommend it	45	53	60	59	53
✓ Yourself/friends/family live or study there/have lived or studied there	37	53	44	55	53
✓ Easier to speak the language	37	33	28	41	27
✓ Can work in the country after studying	29	20	24	32	20
✓ People in the country are very accepting of people from other countries	29	23	16	27	33
✓ Many Taiwanese people live or study there	27	23	28	36	27
✓ Takes less time to complete the qualification	24	20	40	23	20
✓ Teachers/school advisors recommend it	24	20	40	45E	13
✓ Cost of living is affordable/not expensive	22	23	28	27	33
✓ Easy to be allowed in the country/get a visa	18	20	16	36	33
✓ Country is safe/has little crime	16	43AC	16	27	53AC
✓ Easy to be accepted in educational institutions	16	17	24	32	33
✓ Can get a scholarship/easy to get scholarship	16B	-	12	18B	7
✓ Cost of education is affordable/not expensive	14	13	24	23	13
✓ Close to Taiwan	10	23	16	14	13

*Only 5 main countries are shown

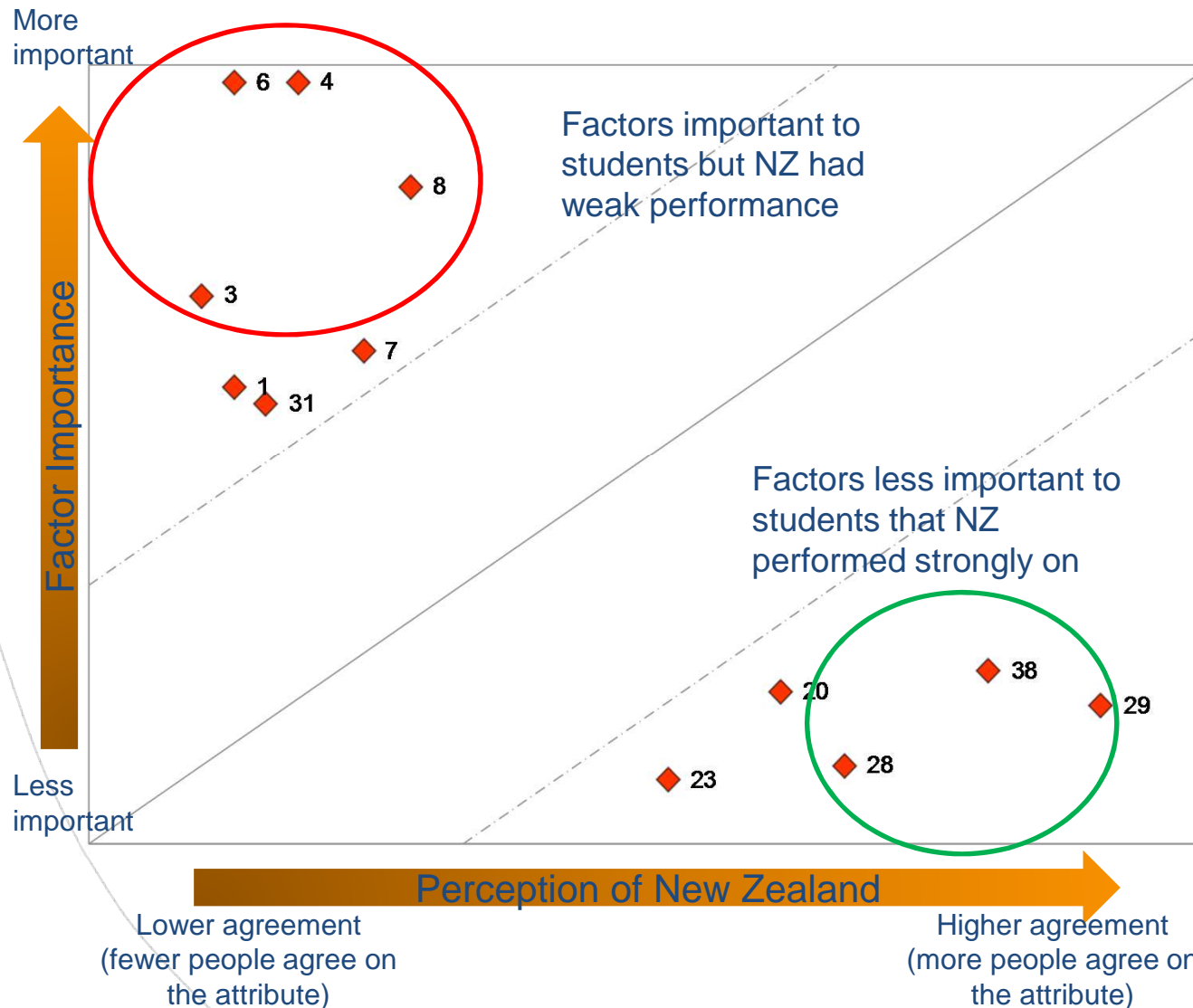
A/B/C/D denote significantly higher at 95% confidence level
Figures highlighted by are the top reasons for the country

Base:
Q6:

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

NZ was poorly linked with important drivers, such as academic qualification and specialty, indicating areas to be improved.

Factor Importance vs. Perceptions of NZ – Tertiary 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

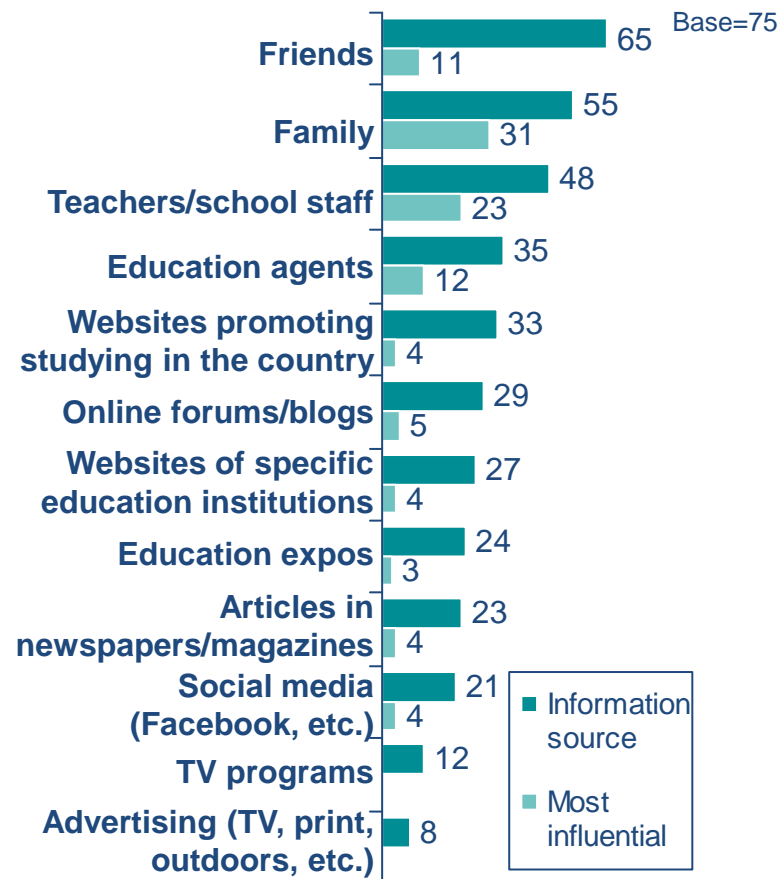
- Information Sources and Communication Perceptions**

Potential students and Parents

Word-of-mouth was the main information sources for tertiary students and only a few students had ever paid visits to ENZ's website.

Information Sources for Country Choice and Websites Ever Visited – Tertiary Students

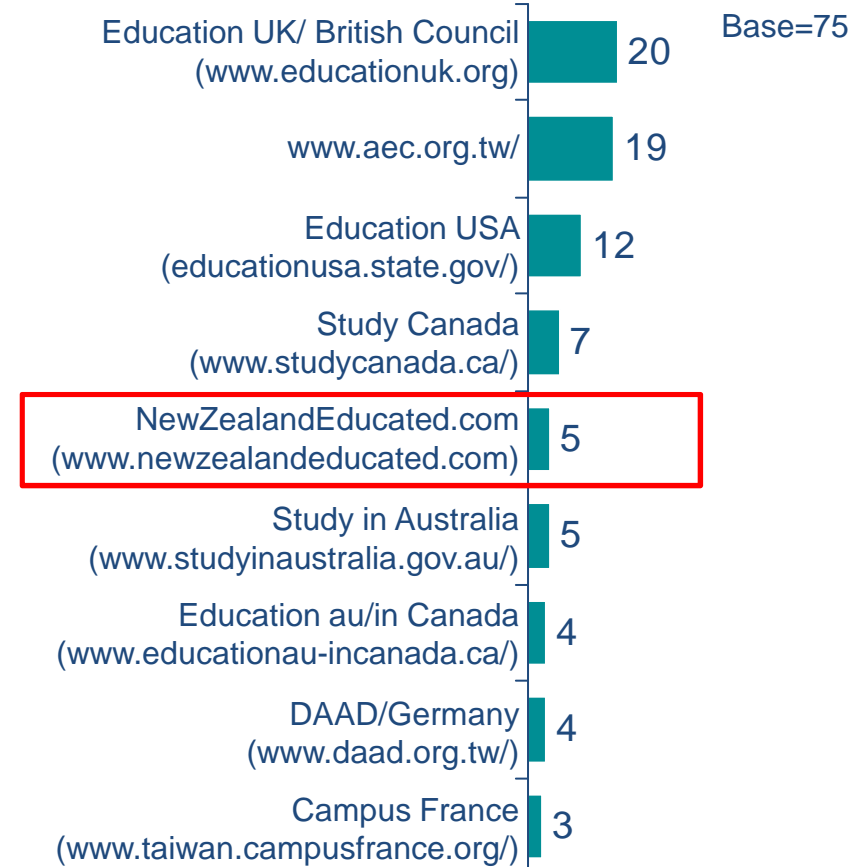
Information Sources for Country Choice



Base:
Q11:

All respondent,
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



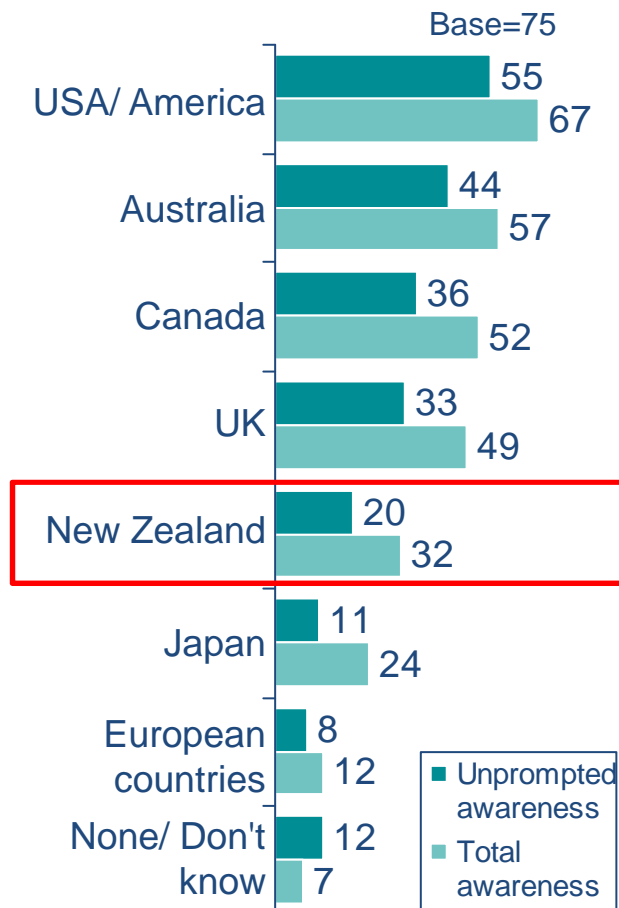
Base:
Q11a:

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

Awareness of country advertising was similar with people's consideration set of countries and tertiary students claimed they mainly learned the information from education expos.

Awareness of Country-Specific Promotions and Sources of Awareness of NZ-Specific Advertising – Tertiary Students

Awareness of Country-Specific Promotions



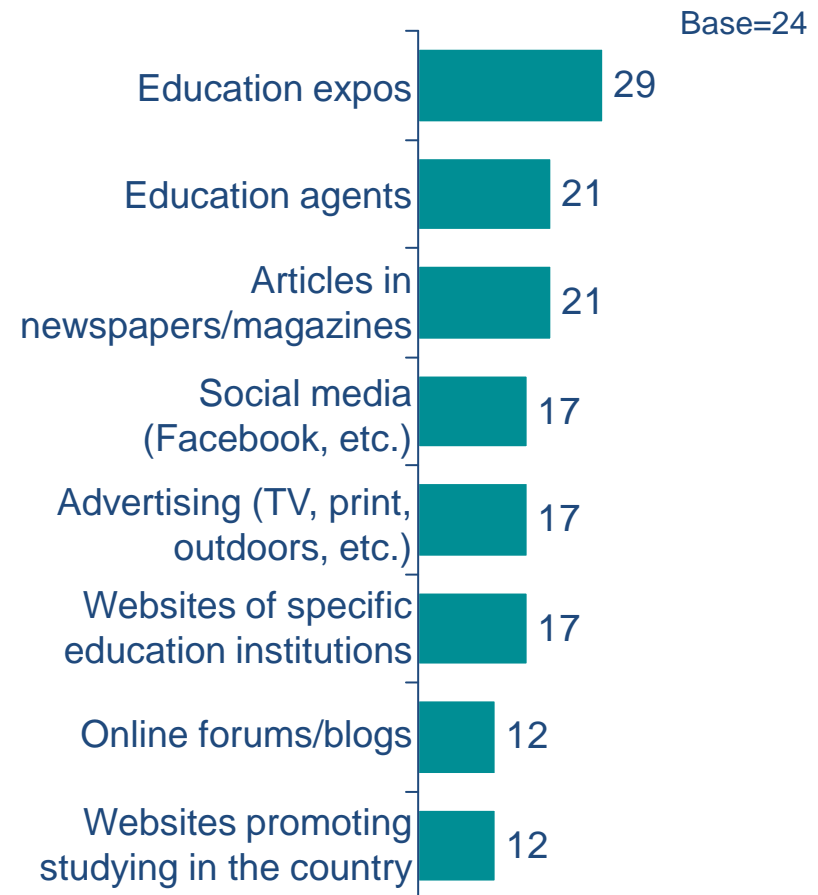
Base:
Q13:

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 works was the main information received from NZ-specific communications.

Information Received from New Zealand Advertising – Tertiary Students

	<i>Base</i>	<i>24</i>
✓ Allows work part-time		33
✓ Cost of living/study is affordable/not expensive		21
✓ Instructions of schools/subjects		17

Base:
Q16:

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

Appendix

- Detailed Results

Potential students and
Parents

Appendix

- Detailed Results of Factor Importance & Explanation of MaxDiff**

Potential students and Parents

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

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

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

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

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

Detailed Importance Scores of Each Attributes – Tertiary Students

Most Important Factors

Rank	Attribute	Score
1	Qualifications are highly regarded internationally	5.89
2	The country is recognised as one of the best places to study the subject interested in	5.88
3	Allows the flexibility to choose the types of courses/subjects want to study	5.08
4	Has teachers / researchers who are highly regarded internationally	4.25
5	Easy to speak/understand the language	3.95
6	Education system encourages students to think for themselves (encourages independent thinking)	3.82
7	Education institutions are highly regarded internationally	3.54
8	Has strong standards for the care and protection of international students	3.41

Less Important Factors

Rank	Attribute	Score
9	Cost of living is not expensive	3.09
10	People in the country are very accepting of people from other countries	2.95
11	Takes less time to complete the qualification you/ your children want	2.93
12	Country is safe / has little crime	2.89
13	Cost of education is not expensive	2.83
14	Country has a wide range/diversity of people and cultures	2.76
15	Easy to be accepted in educational institutions in the country	2.72
16	Is a very convenient place to live	2.63
17	Easy to get information about studying in the country	2.42
18	Academic requirements are not too strict	2.42
19	Is a country internationally recognised as being innovative	2.40
20	Has a lively, exciting lifestyle	2.34
21	Is a technologically advanced country	2.33
22	Allowed to work part-time in the country while studying	2.20
23	Easy to get a scholarship	2.18
24	My friends/family recommend it	2.09
25	Has friendly homestay families	2.04
26	Easy to be allowed to stay in the country after studying	2.03
27	I have personal experience of the country	2.00
28	School teachers / school advisors recommend it	1.96

Least Important Factors

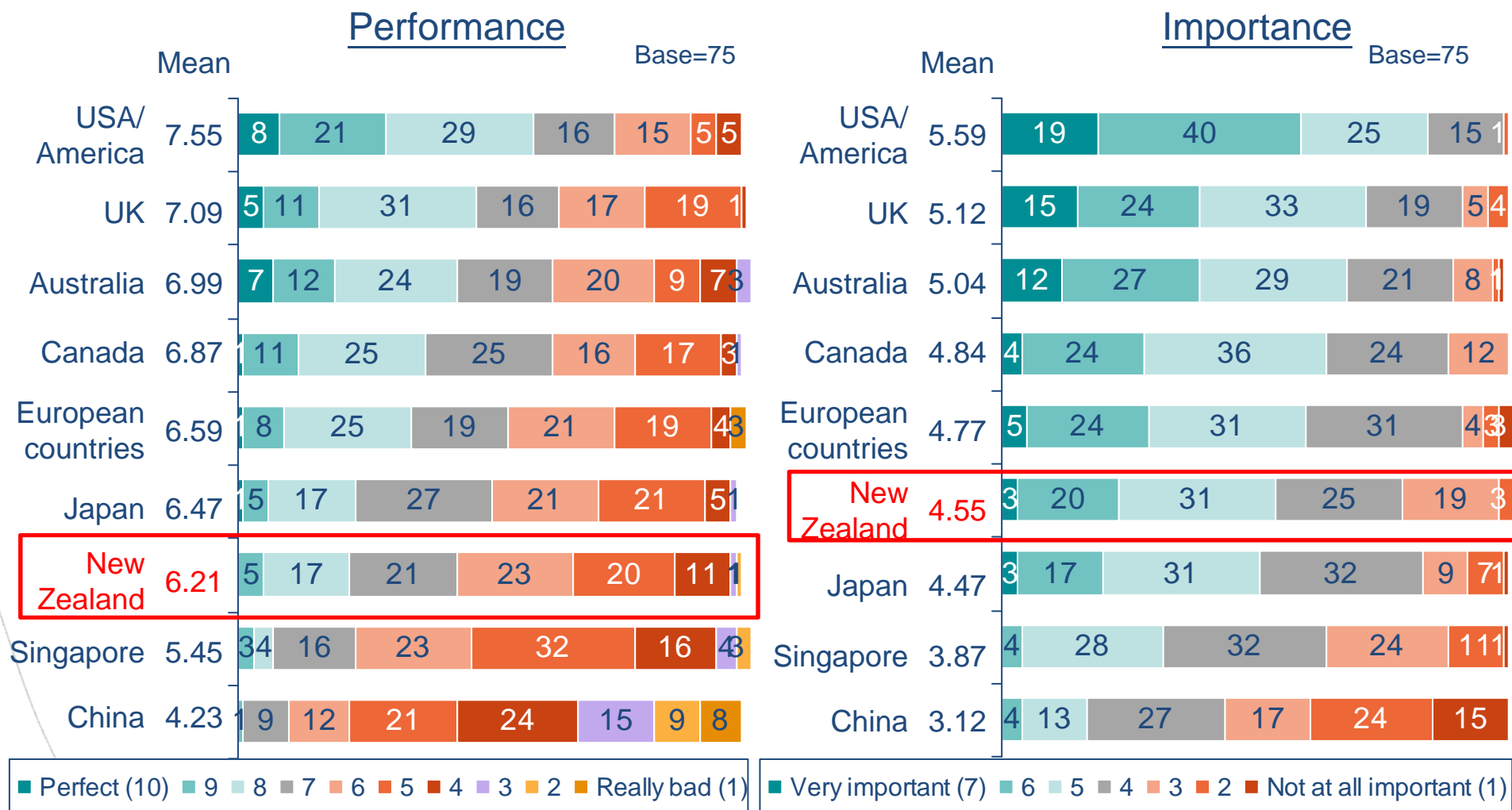
Rank	Attribute	Score
29	Many Taiwanese people live or study there	1.64
30	Has a long history / culture	1.58
31	Has a formal alumni network that allows you/ your children to easily maintain contact with fellow students	1.57
32	The number of tests required for each course is relatively few	1.57
33	Country has a wide range of outdoor/adventure activities available	1.35
34	Education institutions are historic / have a long history	1.34
35	Easy to be allowed in the country / get a visa	1.19
36	Country has a good climate / weather	1.08
37	Education agents recommend it	0.88
38	Has relatively small class sizes (small number of students per class)	0.86
39	Famous/highly regarded people have studied in the country	0.77
40	Country is a good place to raise children/ Children will not learn bad behaviour or bad habits.	0.62
41	Easy to travel to/from Taiwan	0.51

Appendix

- Detailed Results of Country Importance and Country Performance**

Potential students and Parents

Performance and Importance – Tertiary Students by Country



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

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

Appendix

- Detailed Results of Country Perceptions**

Potential students and
Parents

Detailed Country Perceptions – Tertiary Students (attributes 1-15)

	NZ	UK	Canada	USA	Australia
Country has a good climate/weather	63	13 ▼	20 ▼	23 ▼	67
Country has a wide range of outdoor/adventure activities available	56	8 ▼	29 ▼	31 ▼	59
Allowed to work part-time in the country while studying	48	17 ▼	27 ▼	43	60
Country is a good place to raise children/Children will not learn bad behaviour or bad hobbies	47	27 ▼	40	16 ▼	48
Country is safe/has little crime	45	23 ▼	35	17 ▼	44
Easy to be allowed in the country/get a visa	43	17 ▼	35	47	45
Easy to get information about studying in the country	40	45	49	81 ▲	52
Cost of living is not expensive	40	3 ▼	20 ▼	12 ▼	31
Academic requirements are not too strict	40	16 ▼	13 ▼	23 ▼	43
Cost of education is not expensive	39	7 ▼	19 ▼	11 ▼	39
Easy to be accepted in educational institutions in the country	39	13 ▼	21 ▼	31	47
Easy to travel to/from Taiwan	36	20 ▼	28	31	44
Has friendly homestay families	35	23	24	35	41
Easy to speak/understand the language	35	41	47	81 ▲	39
Has relatively small class sizes (small number of students per class)	29	23	31	28	20

Base:

All Tertiary Students, 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 – Tertiary Students (attributes 16-30)

	NZ	UK	Canada	USA	Australia
People in the country are very accepting of people from other countries	29	25	33	61 ▲	43
Has a lively, exciting lifestyle	28	29	29	57 ▲	37
The number of tests required for each course is relatively few	27	15	20	20	36
Takes less time to complete the qualification you/ your children want	25	32	17	21	29
Easy to get a scholarship	25	9 ▼	17	28	25
Easy to be allowed to stay in the country after studying	25	11 ▼	20	35	31
Has a formal alumni network that allows you/ your children to easily maintain contact with fellow students	24	35	35	60 ▲	32
Education agents recommend it	23	29	16	45 ▲	25
Many Taiwanese people live or study there	23	20	32	73 ▲	44 ▲
Is a country internationally recognised as being innovative	21	33	20	64 ▲	23
Allows you the flexibility to choose the types of courses/subjects you want to study	20	36 ▲	24	60 ▲	37 ▲
Country has a wide range/diversity of people and cultures	20	32	27	80 ▲	31
Education system encourages students to think for themselves (encourages independent thinking)	17	48 ▲	32 ▲	72 ▲	32 ▲
Is a very convenient place to live	16	37 ▲	35 ▲	76 ▲	27
My friends/family recommend it	15	29 ▲	20	57 ▲	36 ▲

Base: All Tertiary Students, 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 – Tertiary Students (attributes 31-41)

	NZ	UK	Canada	USA	Australia
Is a technologically advanced country	15	47 ▲	32 ▲	96 ▲	25
Qualifications are highly regarded internationally	13	65 ▲	31 ▲	87 ▲	25
I have personal experience of the country (visited/lived there before, or have friends or family who have lived or studied there)	13	21	20	44 ▲	32 ▲
Education institutions are historic/have a long history	12	72 ▲	25 ▲	73 ▲	16
My teachers/school advisors recommend it	11	36 ▲	21	59 ▲	19
Has strong standards for the care and protection of international students	11	29 ▲	16	39 ▲	21
Education institutions are highly regarded internationally	9	59 ▲	21 ▲	87 ▲	24 ▲
The country is recognised as one of the best places to study the subject you're interested in	9	32 ▲	21 ▲	71 ▲	16
Has a long history/culture	9	73 ▲	25 ▲	69 ▲	20
Has teachers/researchers who are highly regarded internationally	7	51 ▲	19 ▲	75 ▲	12
Famous/highly regarded people have studied in the country	4	61 ▲	21 ▲	81 ▲	11

Base: All Tertiary Students, 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!