

Understanding the New Zealand education brand in key markets

Brand tracker report

September 2023



1 Methodology

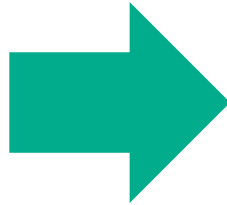


The content and coverage of the annual brand tracker has changed in 2023

2022 Overview

Since 2016, the annual brand tracker has been built around a driver model (showing both the impact of different perceptions and NZ's performance on these), alongside brand health and business issues to support that

Recent editions have also had a strong focus on understanding the impact of NZ's Covid 19 response on brand health.



2023 Overview

A reset of the survey was required to align with the revised 2018-2030 International Education Strategy and post-Covid rebuild.

The key changes can be summarised as such.

- a. The driver model has been removed
- b. There is a greater focus upon brand health with the addition of two new measures i.e. %Unprompted Aware and % Researched
- c. The brand association statements have been updated to be aligned with the latest Think New brand expression

The survey content was customised to the needs of ENZ in 2023, within the boundaries of a 10-minute questionnaire.

4001 considerers were surveyed online across 10 priority markets

Brand Tracker sample and methodology

Market	Total sample
Brazil	400
China tier 1	400
China tier 2	400
India	401
USA	400
Japan	400
South Korea	400
Thailand	400
Vietnam	400
Philippines	400
Total	4001



Survey respondents were 16-25 years old who were interested in studying overseas.

In each market, 20% of students were aged 16-17 and 80% were 18-25.

The survey was run from the 2nd of June to the 21st of June, followed by Philippines which was run between 8th of September and the 14th of September.

The survey data was weighted using two-step weighting to be representative of each market's population on age and gender

Throughout the report, the symbols below are used to represent any significant increases over time or between groups of students

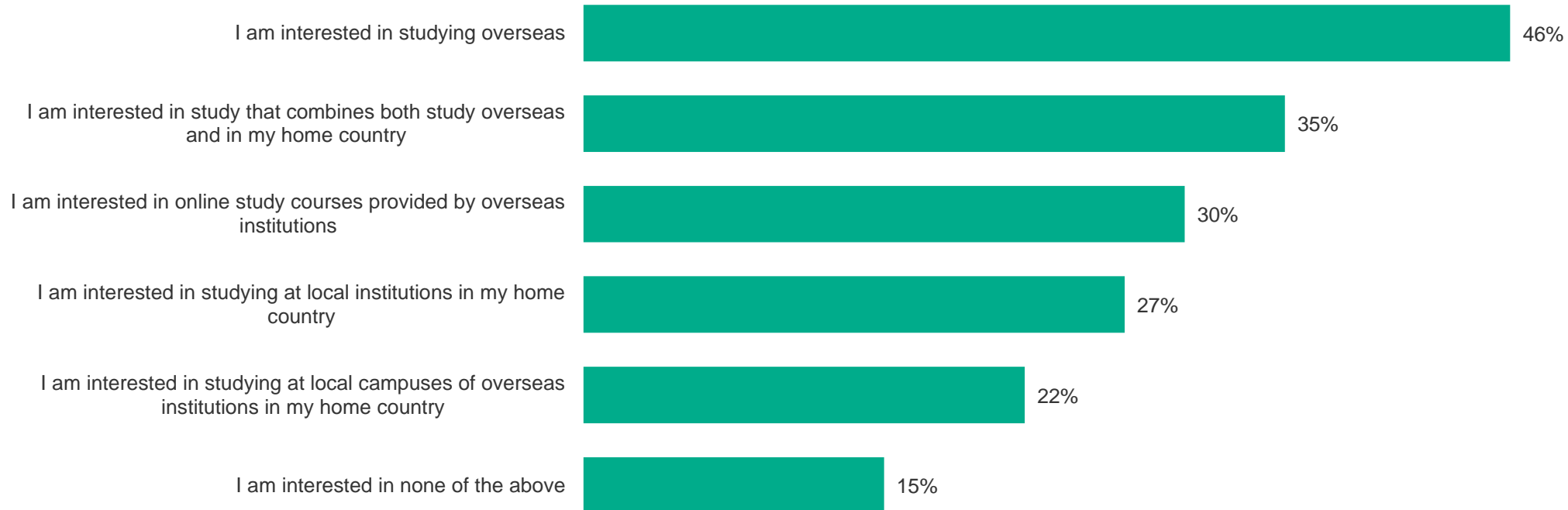
 Significantly higher /
 lower than previous waves or
comparison groups

2

What is the structure of overall demand for International Education?

70% of 16 to 25 year-olds are interested in studying overseas with offshore still the most appealing option

Interest in study by type & location



70% of 16 to 25 year-olds are interested in at least one of these options

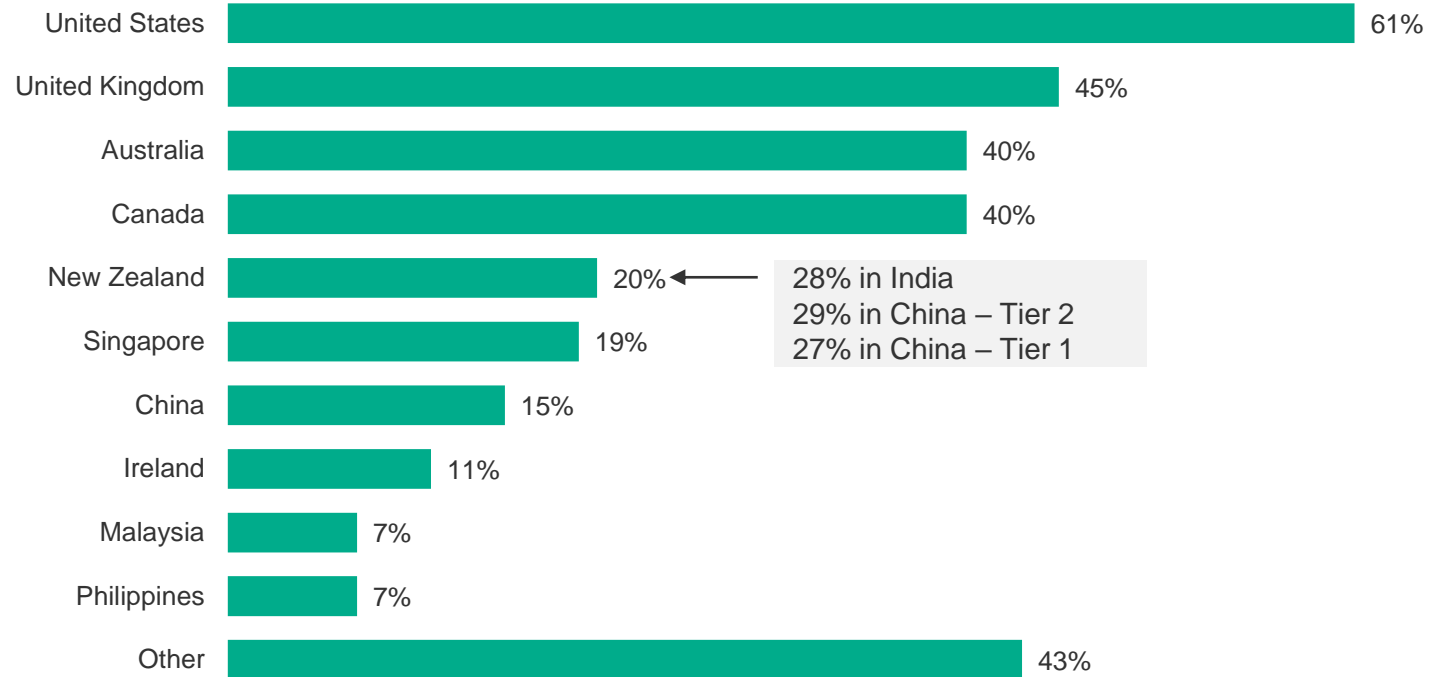
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Understanding NZ's Brand Health



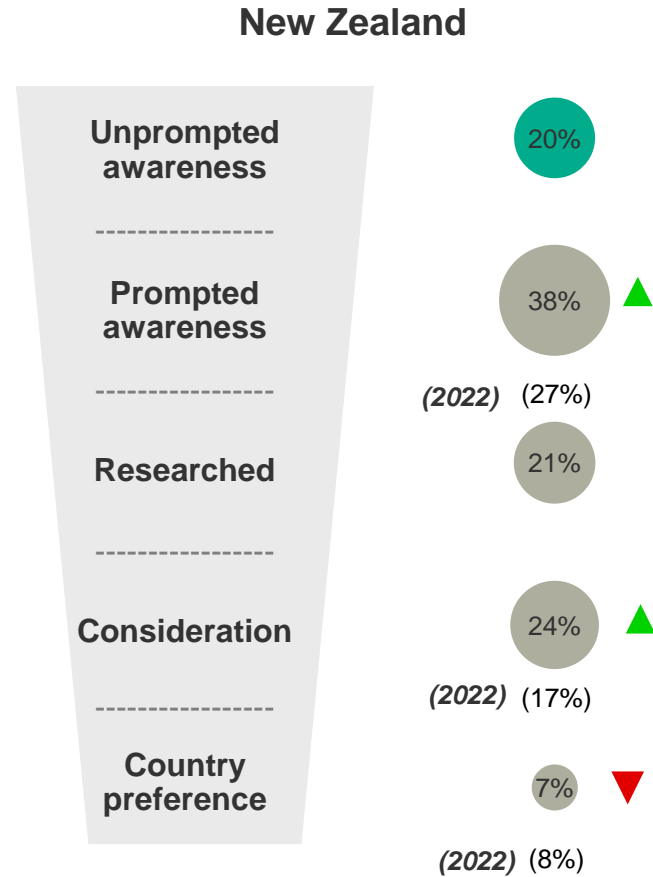
20% of global considerers are aware of NZ without prompting and this is higher in China & India

Unprompted awareness



When viewed in isolation, NZ's brand health has improved since 2022 with increases seen in prompted awareness and consideration

Brand funnel for New Zealand



Base sizes n = 4001 | 4001 | 4000 | 4001 | 4001

Q: Below are countries you typed in. To help us, use the boxes to choose the country you had in mind

Q: Which of these countries were you aware of as a possible study destination?

Q: Which of these countries would you consider as possible study destinations for you?

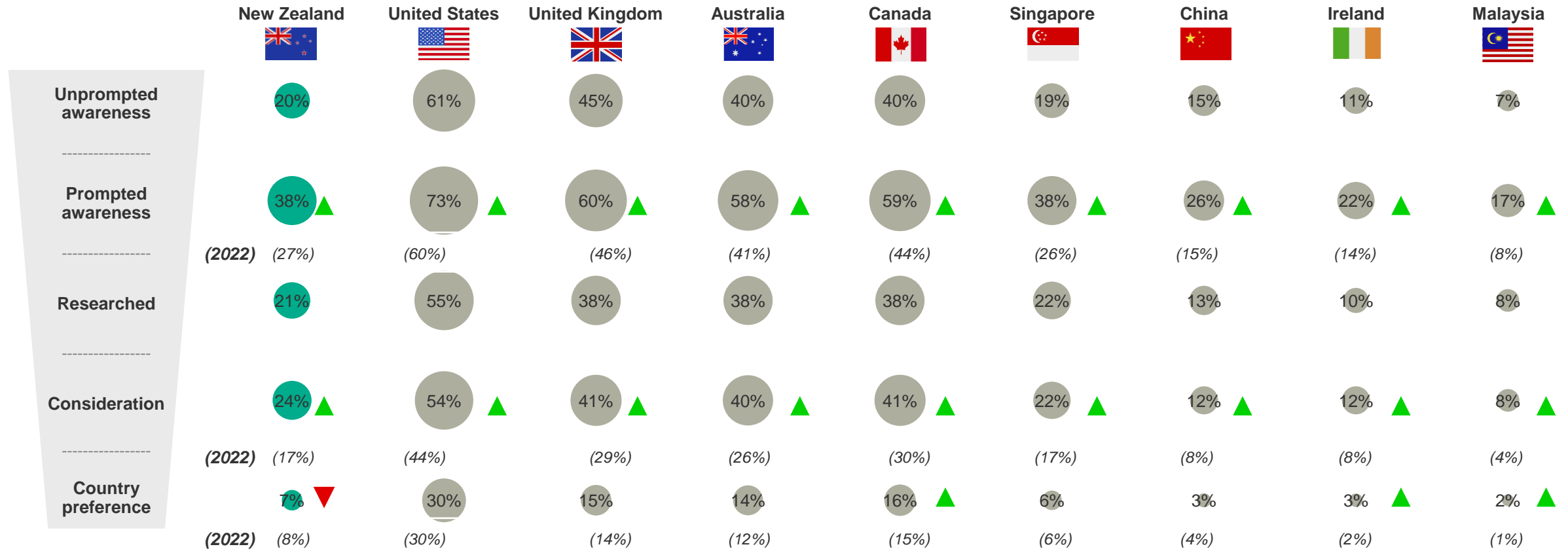
Q: And which of these countries have you collected information on – even if it's just informally?

Q: Please enter 1 for your most preferred country, 2 for your next most preferred destination etc...

▲ ▼ Significantly higher / lower than previous wave

However, most competing brands have also seen similar improvements in brand health, meaning NZ's competitive strength is effectively steady with 2022

Brand funnel by competitor



Base sizes n = 4001 | 4001 | 4000 | 4001 | 4001

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Q: Which of these countries would you consider as possible study destinations for you?

Q: Please enter 1 for your most preferred country, 2 for your next most preferred destination etc...










▲ ▼ Significantly higher / lower than previous wave

That steadiness of performance can be seen when looking at year on year changes, firstly in prompted awareness, where we also see that NZ's YoY increase is in line with our 2022 level

Change in Prompted Awareness 2022 to 2023










Share of Prompted Awareness		New Zealand	United States	United Kingdom	Canada	Australia	Singapore	China	Ireland	Malaysia
										
2022	9%	27%	60%	46%	41%	44%	26%	15%	14%	8%
2023	10%	38%	73%	60%	59%	58%	38%	26%	22%	17%
Increase YoY	1%	41%	22%	30%	44%	32%	46%	73%	57%	113%

Secondly regarding consideration, we also see YoY consistency at a share level, while the UK & Canda's strong performance likely also reflects its aggressive student acquisition tactics of 2022

		Change in Consideration 2022 to 2023								
Share of Consideration		New Zealand	United States	United Kingdom	Canada	Australia	Singapore	China	Ireland	Malaysia
										
2022 Consideration	9%	17%	44%	29%	26%	30%	17%	8%	8%	4%
2023 Consideration	9%	24%	54%	41%	41%	40%	22%	12%	12%	8%
Increase YoY	no change	41%	23%	41%	58%	33%	29%	50%	50%	100%

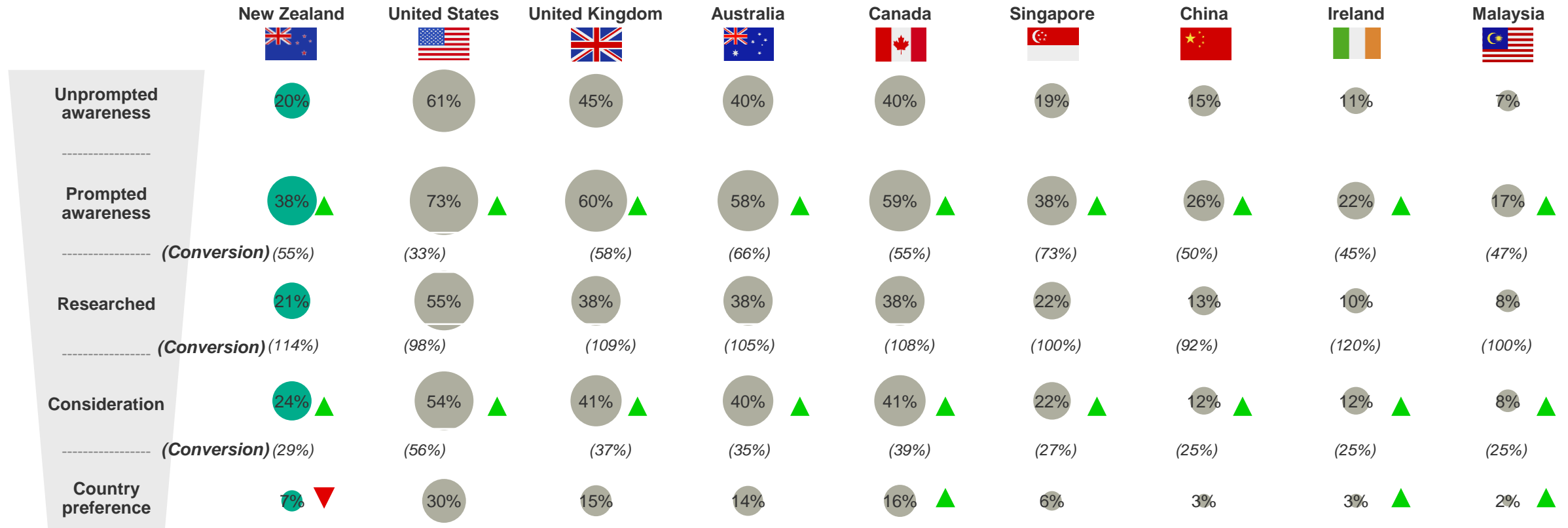
Finally, regarding Preference many brands have shown little change, but again the UK & Canada are strengthening their brand health

Change in Preference 2022 to 2023

	Share of Preference	New Zealand 	United States 	Canada 	United Kingdom 	Australia 	Singapore 	China 	Ireland 	Malaysia 
2022 Preference	8%	8%	30%	15%	14%	15%	6%	4%	2%	1%
2023 Preference	7%	7%	30%	16%	15%	14%	6%	3%	3%	2%
Increase YoY	-14%	-14%	no change	6%	7%	-7%	no change	-33%	50%	100%

NZ's unprompted awareness is low compared to key competitors i.e. 53% of those aware of NZ need prompting, compared to only 20% of those aware of the USA, or 27-36% of those aware of UK, Australia or Canada

Brand funnel by competitor



Base sizes n = 4001 | 4001 | 4000 | 4001 | 4001

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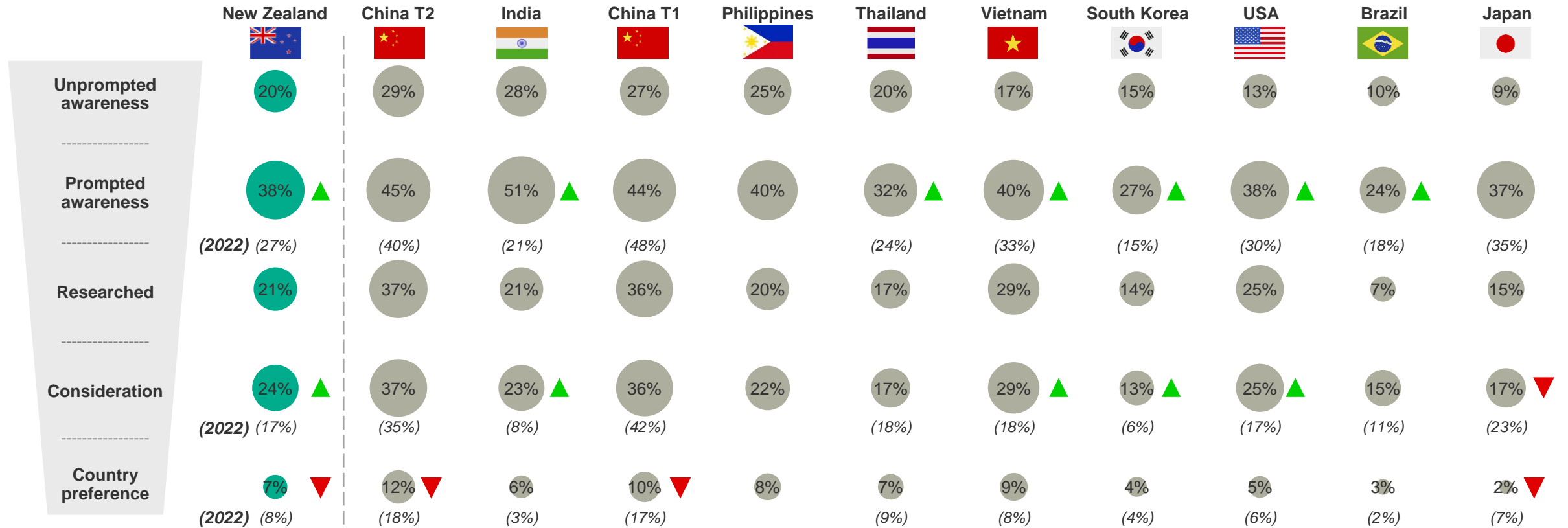
Q: Which of these countries would you consider as possible study destinations for you?

Q: Please enter 1 for your most preferred country, 2 for your next most preferred destination etc...

▲ ▼ Significantly higher / lower than previous wave

After a sustained period of positive brand performance, preference for NZ has declined across China & Japan

NZ Brand funnel by market



Base sizes n = 4001 | 4001 | 4000 | 4001 | 4001

Q: Below are countries you typed in. To help us, use the boxes to choose the country you had in mind

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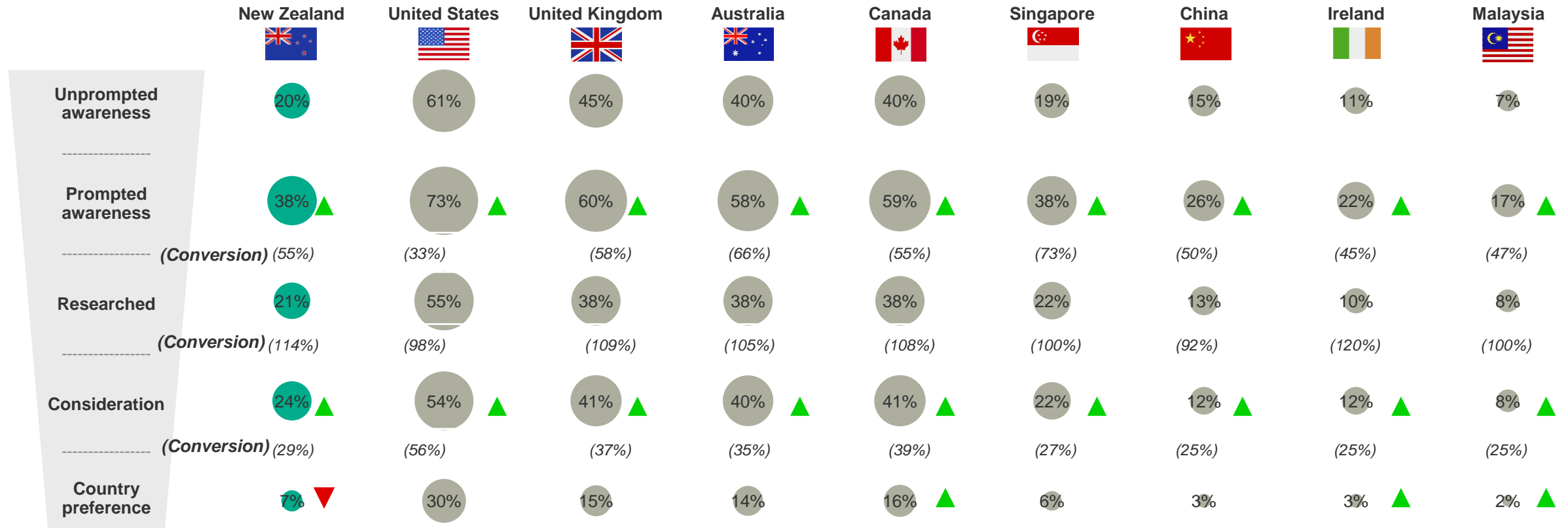
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We can also understand NZ's brand performance via conversion ratios, while NZ remains deadlocked with Singapore for competitive cut-through and effectiveness

Brand funnel by competitor



Base sizes n = 4001 | 4001 | 4000 | 4001 | 4001

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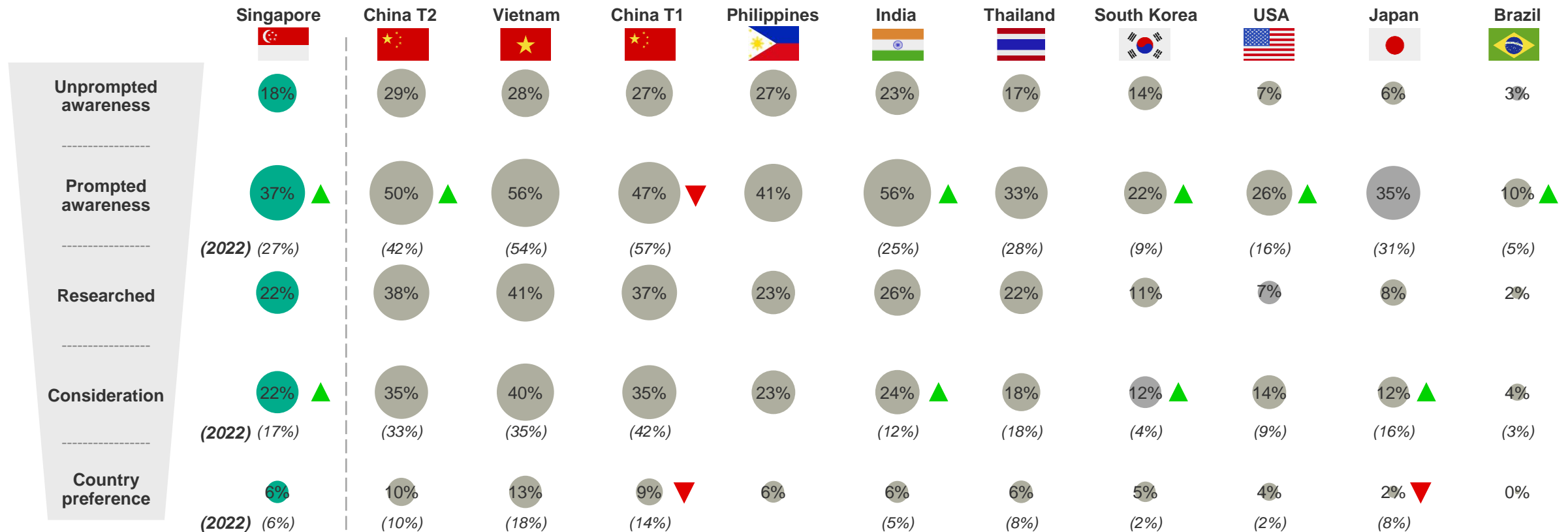
Q: Which of these countries would you consider as possible study destinations for you?

Q: Please enter 1 for your most preferred country, 2 for your next most preferred destination etc...

▲ ▼ Significantly higher / lower than previous wave

NZ's closest competitor Singapore has also seen awareness and consideration increase alongside declining preference in China & Japan

Singapore Brand funnel by market



Base sizes n = 4001 | 4001 | 4000 | 4001 | 4001

Q: Below are countries you typed in. To help us, use the boxes to choose the country you had in mind

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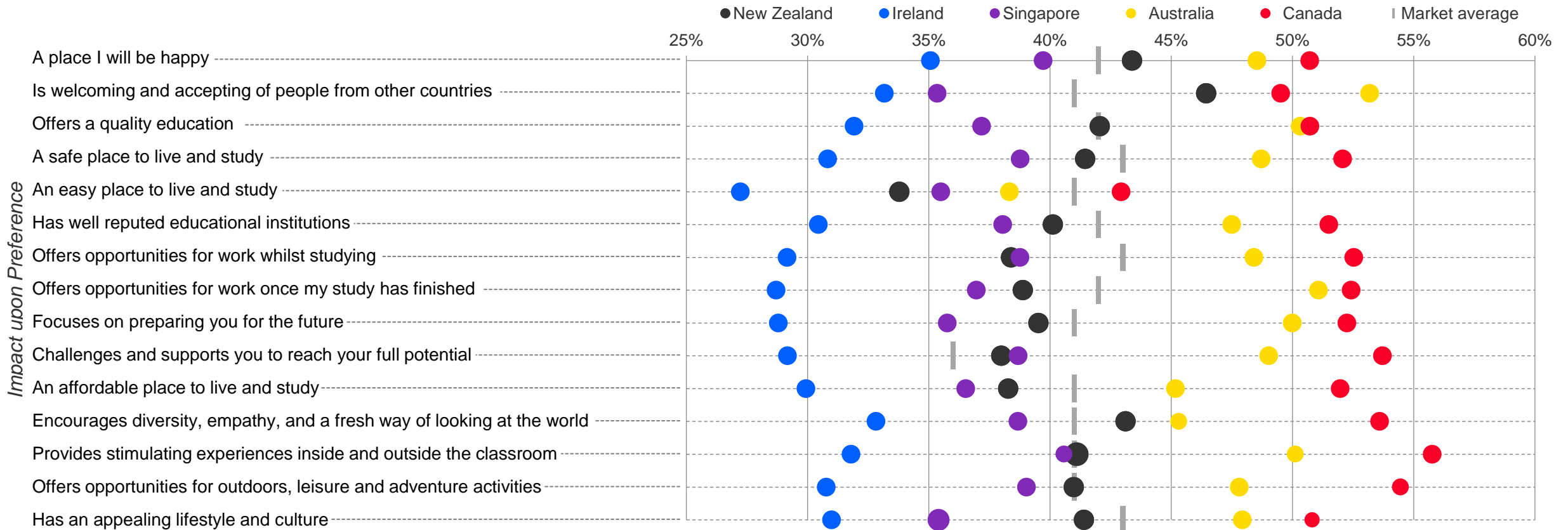
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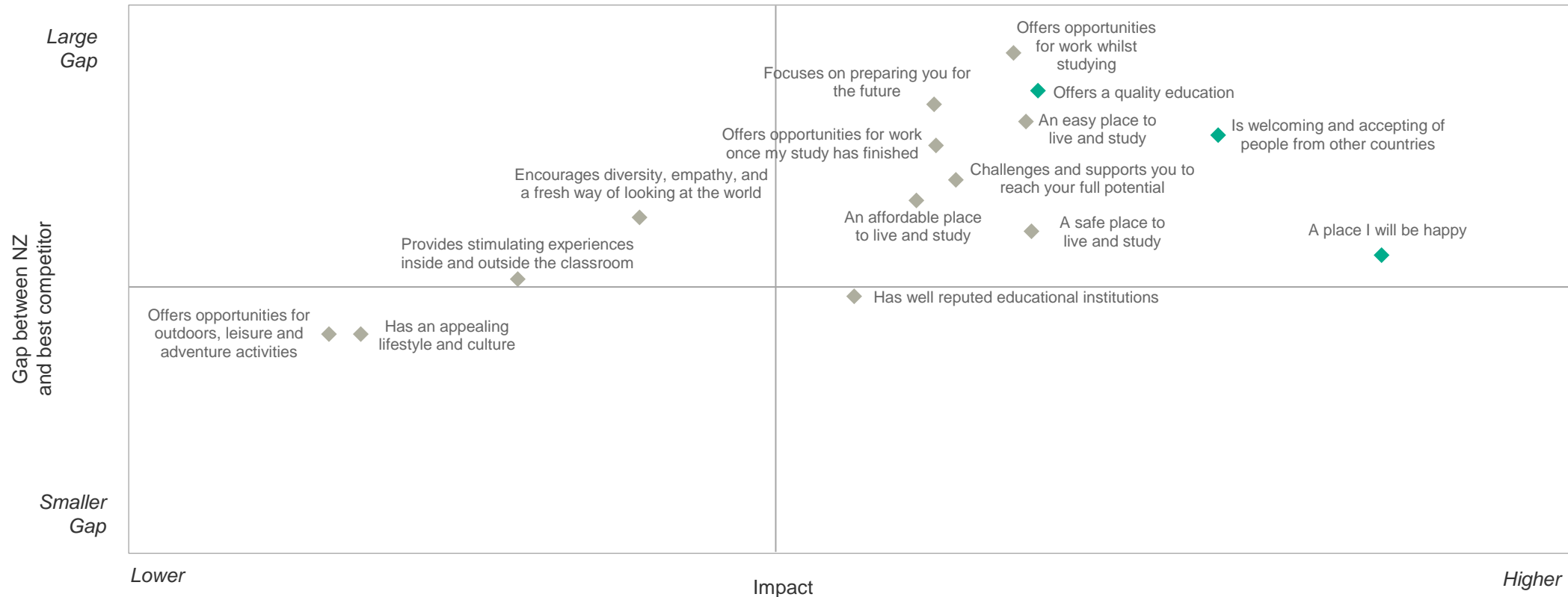
To differentiate further from Singapore, NZ could place more emphasis on a quality education and work opportunities during and post study

Brand Associations - % agree NZ vs. competitors (Top 2 Box %)



NZ has considerable ground to make up vs. Canada and Australia, with the highest impact brand associations of happiness and welcome offering the best opportunities to do so

Brand Associations - % agree NZ (Top 2 Box %) vs. Impact (Jaccard Co-efficients)



NZ's overall perceptual profile is tightly bunched with relative strengths in a safe, outdoor and quality education alongside relative weaknesses in work and affordability

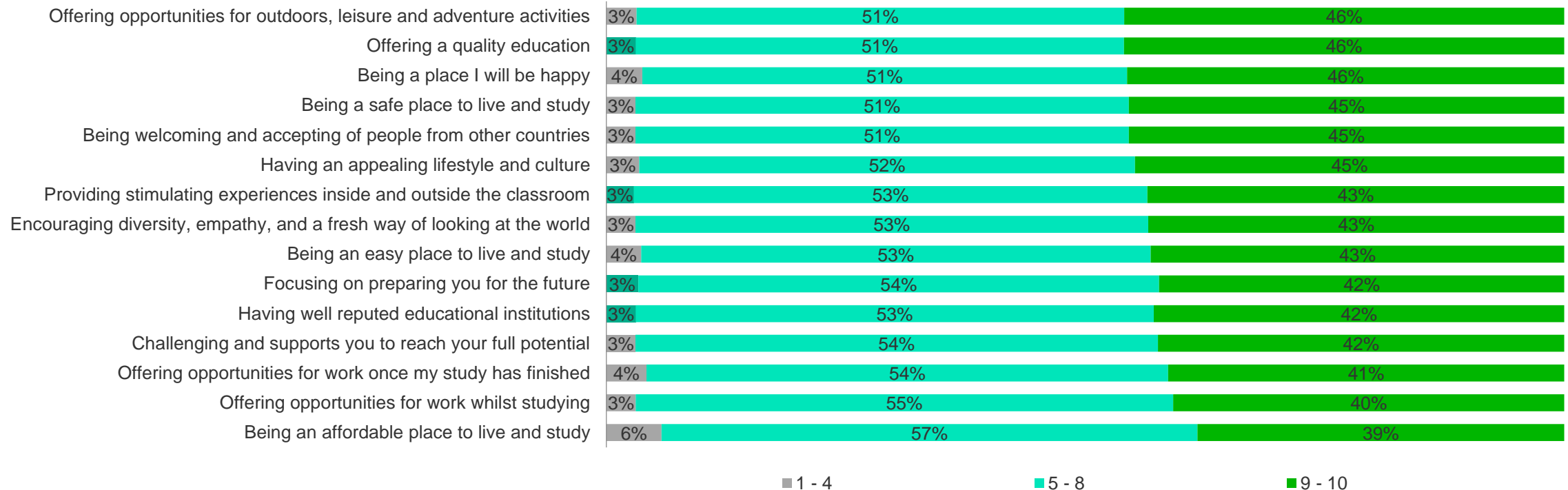
New Zealand Brand Association ratings (Top 2 Box %)



Overall, females in the 16 to 17 year age group, current school students, and high-income households tend to rate New Zealand highly across all attributes over other subgroups

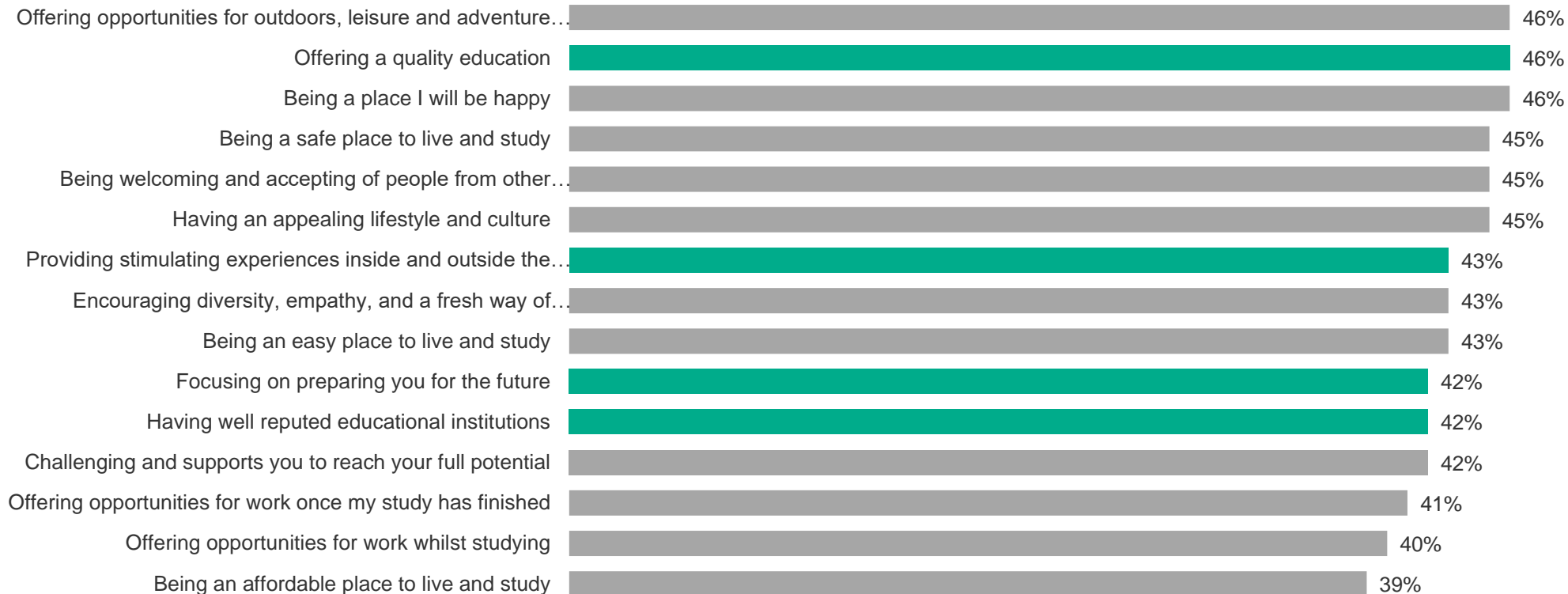
The distribution of NZ ratings also shows a very tight and consistent pattern

New Zealand Brand Association ratings



It is recommended to combine the below statements into a blended measure of Education Quality as it offers a more well-rounded appraisal

New Zealand Brand Association ratings (Top 2 Box %)



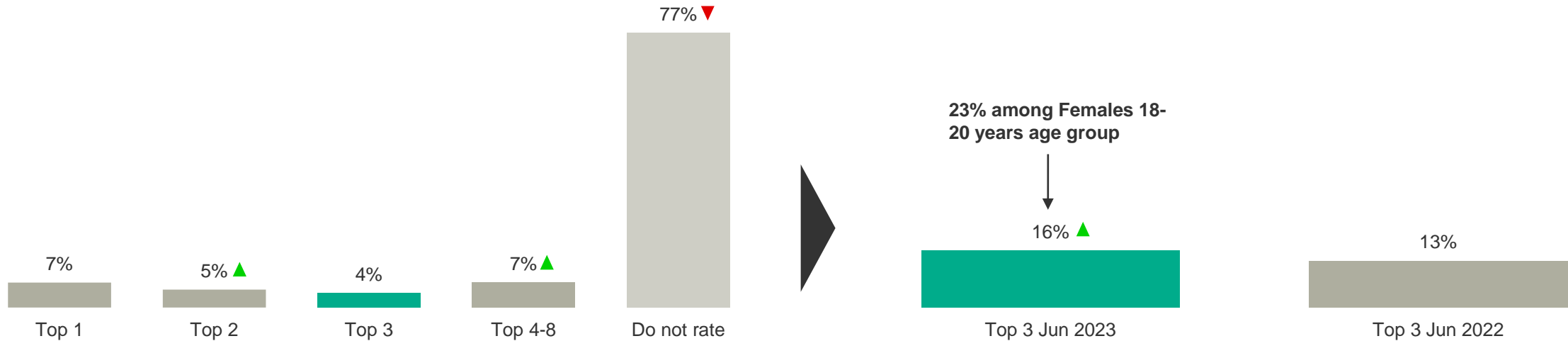
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Trends in Preference



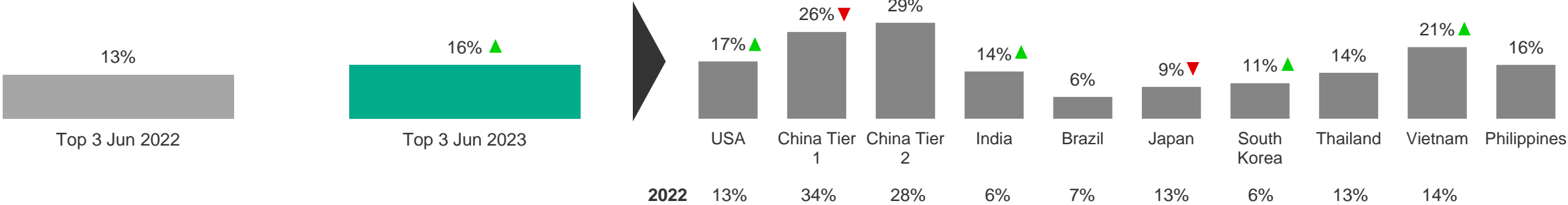
NZ has increased its top3% preference to 16% in 2023, and again we see some positive brand health for NZ among younger females

% of global student IE considerers who rate NZ in their...



Despite the declines in preference in Tier 1 cities, China still drives preference overall while Vietnam, South Korea, India & the US have all seen positive improvement in NZ preference

% of global student IE considerers who rate NZ in their...



5

Summary & Recommendations



A summary of findings is presented below

70% of 16 to 25 year-olds are interested in investing in an International Education, with offshore still the most appealing option.

20% of global considerers are spontaneously aware of NZ and this is higher in China, India, & the Philippines.

NZ's brand health has improved since 2022 with increases seen in prompted awareness and consideration.

However, most competing destinations have also seen similar proportionate increases in brand health, meaning **NZ's competitive strength overall is effectively steady** with 2022. Within these overall patterns, Canada & the UK appear to have positive brand momentum

NZ's **low top of mind recall** as a study destination has been seen, indicating that this is also a relevant brand challenge in addition to the level of conversion through to consideration and preference.

In an attempt to find clear competitive positioning within the 2nd tier of international education markets, NZ remains deadlocked with Singapore in terms of most brand health measures, but can find some areas of meaningful difference regarding education quality and work opportunities

It is in **China and Japan** where NZ's brand strength has seen the biggest declines in the last 12 months, although China remains a key driver of top3 preference for NZ, and this should be contextualised as having come off a sustained period of growth in brand health

The key perceptions of NZ that will have the greatest impact upon improving brand perceptions are happiness, welcome & acceptance and education quality – which offers an interesting opportunity to incorporate the best of NZ's nurturing archetype within the ongoing messaging regarding education quality

Key recommendations

- a. Incorporate Unprompted Awareness as a marketing / campaign KPI. 20% of global considerers are spontaneously aware of NZ and although higher in China, India, & the Philippines, it is relatively low compared to Australia and Canada which are NZ's two primary competitors
- b. Across the Asian markets & India, consider targeting Singapore more directly, highlighting NZ's education quality and work opportunities
- c. Consider an enhanced role for happiness, welcome & acceptance alongside the ongoing emphasis upon education quality within brand messaging and creative. Interpret happiness, welcome & acceptance in a contemporary EDI manner to carefully distinguish from the schools' nurturing expression of the same values
- d. Investigate the drop in brand health within Japan

KANTAR

Thank you

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