



Post Fair Report

This report serves as a summary and evaluation of an Education New Zealand PACE 2007 Marketing Event. Written initially as a confidential document between ENZ, NZTE and participating institutions, this report will also be available for industry access at the Market Information section of www.educationnz.org.nz approximately 6 months after the event date.

Name of Event	New Zealand Education Fairs
Country Name	Viet Nam
Event Date	Ha Noi - 15 & 16 June Ho Chi Minh City - 17 & 18 June

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1. Executive Summary

New Zealand Trade and Enterprise Ho Chi Minh City and Education New Zealand co-organised Agent Workshops, Agent training seminars and Education Fairs in Ha Noi and Ho Chi Minh City from June 15 to June 18, 2007.

These were the ninth Education New Zealand Fairs to be held in Viet Nam. A total of 28 institutions participated covering all sectors - English Language, Foundation, Secondary School and Tertiary. It was pleasing to see representation from seven universities this time.

Visitor numbers for the Fairs in Ha Noi and Ho Chi Minh city were conservatively estimated at 400 and 1,000 respectively.

Agent workshops and agent training seminars were held in the two major centres and gave the agencies a special opportunity to meet with the institutions for further cooperation and to be updated with new changes on the visa process.

Visitor analysis indicated an overall 22% demand for Secondary School, 15% demand for Diploma study, 36% demand for Undergraduate study and 27% demand for Post-Graduate study. A 35% interest in business, followed by a 13% interest in IT and 8% in law were indicated with a wider range of other subjects emerging. The overall age profile showed 40% of visitors over the age of 23 (showing the strong involvement of parents), 32% under 18 and the balance in the 18-23 age bracket. The overall occupation profile showed that 35% of visitors were currently university students, 25% were in secondary school and of the balance, 40% were shown to be in some form of employment.

The promotional activities included newspaper advertising and information, street banners, website, student leaflet distributors, flyers, posters, and a small amount of direct mailing. High impact TV ads promoting the education fairs were used in Ha Noi and Ho Chi Minh in the week before the fairs. They created a good image of New Zealand education and generated good feedback from agents, institutions and fair visitors.

Media analysis showed 50% of visitors in Ho Chi Minh City reported that they learned about the Fair through newspaper, 18% knew from friends, 15% identifying television, 9% through street banners and 8% via website advertising. In Ha Noi 40% stated that they knew about the Fair through the newspapers, with 23% identifying street banners, 18% stating they obtained information from friends, 13% knew from TV ads and another 6% via website advertising.

2. Event Details

2.1 Promotional Activities

The pre-fair promotion included:

- 1/ Newspaper advertising: ½ page, B&W
 - Tuoi Tre Newspaper: 8 ads
 - Thanh Nien: 8 ads
 - Thoi Bao Kinh Te Viet Nam: 6 ads
 - Phu Nu: 4 ads
 - Giao duc Thanh Pho: 3 ads
 - Tiep Thi Gia dinh: 2 ads
 - Lao Dong: 4 ads
 - Ha Noi moi: 2 ads
- 2/ Newspaper articles about New Zealand education and the fairs
 - Tuoi Tre
 - Tiep Thi Gia Dinh
- 3/ Advertising on websites
 - Tuoi Tre online
 - Thanh Nien Online
 - Mang du hoc online
 - Dan tri Online
- 4/ 30 second TV ads on 2 TV channels
 - National channel VTV
 - HCM City channel HTV

Reporters from Vietnam Television (VTV) and HCM Television (HTV) visited the Fairs for interviews with some representatives and a preliminary show of individual institutions at their own booths. Local television included the New Zealand Fairs in a news coverage the following day.

5/ Student leaflet distributors

12,000 New Zealand Educated branded flyers were given out before the Fair to students from 16 selected high schools and 10 universities in the 2 cities. Students wearing graduation outfits were used to hand out the leaflets, which according to Vietnamese custom were folded in nice envelopes. It intrigued the receivers to discover what would be inside. Posters were also displayed in these institutions.

6/ Street banners

There were 26 banners (8m x 1m) hung at the corners of the most crowded intersections in Ho Chi Minh City and 20 banners in Ha Noi City.

7/ Direct mail

Information was sent to 100 interested parents and students in Ha Noi and HCMC.

8/ Lucky draw

All visitors to the exhibitions had the opportunity to enter the lucky draw for a few free English language courses and gifts offered by Apollo English Language Center in both cities. (Apollo had gone through official channels to request sponsorship rights).

2.2 Participants/NZ Representatives

26 participants representing 28 New Zealand institutions attended the fairs in Viet Nam.

List of the providers:

Institution Name	Participant Name
EF Education First	Jonas Jacobsson
The Campbell Institute - CLA	Tim Mahren Brown
Quality Auckland Regional Group (*)	Chris Klaassen
Cambridge High School	Lauree Fuller
Gisborne Boys' High School	Michele McCarthy
Golden Bay High School	Justine Butler
ISENZ	Russell Trethewey
Nayland College	Judy Glue
Newlands College	Deb Mills
Otumoetai College	Roy Ballantyne
Taylor's College	Thuong Duong Thi
Wanganui High School	Robert Lakeland
Wellington College	Michael Pallin
Wellington East Girls' College	Annette Cumming
Wellington Girls' College	Heather Twigg
William Colenso College	Robin Stewart
ACG	Kim Harase
CPIT	Annie Goh
Massey University	Anke Smith
Unitec	Jude Lydia
University of Canterbury	Farida Memon
University of Otago	Wayne Angus
Victoria University of Wellington	Kirsty Drysdale
Wintec (Waikato Institute of Technology)	Robyn Mccollum
University of Waikato	Kylie Smale
University of Auckland	Farnaaz Mohammed

* Quality AKL Group is Avondale College, Macleans College and AUT University

2.3 Market Briefing

Viet Nam has a population of 85 million people. A growing consumer class has emerged and as in other parts of Asia, this group puts a high value on the education of its children.

There are over 10,000 secondary schools in Viet Nam providing morning and afternoon classes. Most students also attend extra tuition classes in the evening. There are 2 academic terms a year – semester one is from early September to December and semester two is from January to mid May.

There are over 300 tertiary institutions in total. Universities belonging to the national system are considered high quality but only a small number of the private universities fit this category.

The demand for education and vocational training services within Viet Nam is significant and represents a sustainable market opportunity. Each year, there are over one million new entrants joining the workforce so reducing the level of unemployment is a major concern of the government. Raising education levels and advancing the population into higher value-

added occupations is seen as one way of countering unemployment. This continuous need will drive demand for technical and vocational education in Viet Nam.

The Vietnamese government recognises the need to upgrade its education systems to better meet the needs of the large population and a growing economy. As a developing country Viet Nam is getting assistance from international donor organisations such as the ADB and World Bank to improve education. The government is also encouraging foreign investment in the education sector in Viet Nam. Australia now has two tertiary institutions operating in Viet Nam.

As more English language schools are set up in Viet Nam, the English language skills of Vietnamese students are improving. However, learning English within a Vietnamese environment is very difficult and the value of language training in a Western environment is well understood. Most students enrolling in the New Zealand education system still require a period of language study or a foundation programme before they commence formal courses.

The number of students studying at secondary level continues to grow and the trend for students to spend several years overseas continues as the ultimate goal for most students is a tertiary qualification.

In 2006 there were over 1,500 Vietnamese students in New Zealand, a figure that has grown steadily each year from 2001, when there were 600 students studying in New Zealand across all sectors. New visas issued increased 30% in comparison with 2004 and slightly increased in 2006 compared to 2005. This good news showcases a promising market to NZ institutions.

The range of courses in demand is broadening as the market matures – aviation, airport technology, ICT, defence and rail are examples of potential niche areas. The Ministry of Education and Training and the People's Committees also have training programmes for their officials at both undergraduate and postgraduate level that provide another opportunity for New Zealand.

In 2002 some 12,500 visas were issued for Vietnamese students to study overseas. Recent Ministry of Education and Training figures suggest that this number has now grown to 75,000 of which some 5,000 have government scholarships. This illustrates the huge growth that has occurred in recent times as the consumer class expands. The Vietnamese economy has been growing some 7.6% a year for the last two years and the target for 2006 is 8.0%, second in Asia only to China. A qualification from the United States or the United Kingdom is considered the most desirable, but Australia, New Zealand and Canada are also recognised as quality destinations.

Opportunity areas for NZ exporters in the education and training sector in Viet Nam include English language training, secondary schooling, and undergraduate and post-graduate programmes, delivered in-country or abroad. Other areas include education systems reform, vocational training, training to facilitate Viet Nam's entry into the regional and global economies, upgrading the skills of government officials, teachers and private sector personnel at all levels. A particular need for middle management training is emerging as businesses expand in tandem with the growing economy.

Market Entry Strategy:

Viet Nam is an agent market and most families use the assistance of an agent. Agents provide ongoing communication services for those families that do not speak English (particularly important for parents of younger students), assist with documentation required for visas, and can assist with the transfer of funds. The number of agents is constantly growing.

New Zealand institutional representatives should avoid visiting the market at holiday times, especially around the Lunar New Year (Tet) period. Examination times should also be avoided. These run from middle April to early June.

In Viet Nam relationships are important. We recommend institution representatives come to Viet Nam, meet and select education agents, then visit the market on a regular basis to support their agents' efforts and to participate in seminar and fair activities.

New Zealand's strategy is to compete as a quality destination, targeting quality students who appreciate our world-class education system and lifestyle. Referrals from satisfied families will always be the most valuable way to source students. Education fairs, institution seminars targeting students and agents, and agent visits to New Zealand, are important marketing activities. NZTE and ENZ continuously work to raise the profile of New Zealand education in Vietnam. This includes but isn't limited to; fairs and exhibitions such as the New Zealand Education Fairs, VIECA and the International Career & Education Expo. The third edition of the 'Study in New Zealand' education directory in Vietnamese was released in mid 2005 and a further edition finished printing in June 07. In 2006 Vietnam was chosen by the NZ International Education Industry as one of the four depth markets for long term marketing investment. The depth marketing strategy is managed by ENZ, in consultation with NZTE Vietnam.

School Year Dates and Term Dates

The school year for all institutions starts on September 5 every year. All institutions have two academic terms a year. Semester one for secondary schools runs from September to December and semester two from January to mid May. Secondary school students sit a first semester examination in December and a second semester examination sometime between mid April and mid May. The national examinations for Year 9 and Year 12 students takes place at the end of May and the national entrance to university examination is in early July.

For universities and polytechnics semester one runs from September to December and semester two is from January to late June. Students sit first semester examinations in late December or early January and second semester examinations in mid July. Although June, July and August are holiday months for students, many of them will undertake extra classes during this period.

Public Holidays in 2007

1 January 2007	New Year's Day
16 –19 February 2007	Lunar New Year
20 & 21 February 2007	Holidays in lieu of Lunar New Year
30 April 2007	Reunification Day
1 May 2007	Labour Day
2 September 2007	National Day
3 September 2007	Holiday in lieu of National Day

2.4 Presentations and Speeches

This year, we did not hold a fair opening ceremony as previous years so there were no official speeches. However, we arranged a TV interview programme with 2 popular channels in each city to interview the NZ Ambassador in Ha Noi and the New Zealand Consul General in HCM City about the fair and general information about New Zealand. The TV crew also filmed individual institutions at their own booths and the general environment of the fair.

2.5 Seminars & Fairs Schedule

This year the fair relocated to the Sheraton Hotel which has been seen as the most central and modern hotel in Ho Chi Minh City. They offered a reasonable rental fee which was at the same rate as the New World Hotel where the fair was held in previous years. The feedback from the agents, visitors and New Zealand institutions was very positive.

1/ Public seminar:

These were held in the morning of the fair in Ha Noi and Ho Chi Minh City.

They gave comprehensive information on studying in New Zealand. There was also time for parents and students to raise questions and get answers with regard to their individual cases.

A total of 80 people attended at the seminar in Ho Chi Minh City and 40 in Ha Noi.

Schedule of the Seminars:

CITY	DATE	TIMING	VENUE
Ha Noi	Saturday, 16 June	10.30am – 11.30am	Function room 1&2, Level 1 Melia Hotel
Ho Chi Minh	Sunday, 17 June	10.30am – 11.30am	Saigon room, Level 2, Sheraton Hotel

2/ Education fair:

CITY	DATE	TIMING	VENUE
Ha Noi	Saturday, 16 June	9.00am – 5.00pm	Ballroom 1, Level 1 Melia Hotel
Ho Chi Minh	Sunday, 17 June	9.00am – 5.00pm	Ballroom 1&2, Level 3, Sheraton Hotel

2.6 Agent Workshops

1/ Agent Workshop

There was an agent workshop for agents and New Zealand providers in Ha Noi and Ho Chi Minh City. Thirty agents were invited in Ha Noi and 35 in Ho Chi Minh City representing those agencies that work with New Zealand institutions and are sending students to New Zealand.

The agent workshop continues to be a useful way for New Zealand participants and agents to meet with each other.

Schedule for the Agent workshop:

CITY	DATE	TIMING	VENUE
Ha Noi	Friday, 15 June	10.00am – 12.00noon	Ballroom 1, Level 1 Melia Hotel

Ho Chi Minh	Monday, 18 June	9.00am – 11.30am	Ballroom 2, Level 3, Sheraton Hotel
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2/ Agent training seminar

This was held for education agents and took place in Hanoi and Ho Chi Minh City. A representative from INZ Thailand and a visa officer in HCM attended and presented the updated and changed visa process which made it simpler and clearer for agents.

This was a good chance for the agents to raise questions and get relevant answers for their particular cases.

Schedule for the Agent training seminar:

CITY	DATE	TIMING	VENUE
Ha Noi	Friday, 15 June	1.30pm – 3.30pm	Function room 3, Level 2 Melia Hotel
Ho Chi Minh	Monday, 18 June	1.30pm – 3.30pm	Ballroom 2, Level 3, Sheraton Hotel

2.7 Giveaway Items

Giveaway items handed out to fair visitors at the fair were as follows:

- Gift bags with New Zealand Educated branding
- Study in New Zealand Vietnamese Directory
- Study in New Zealand Handbook & university prospectus
- Pens
- Fair plastic bags

2.8 Attendance

The Viet Nam June fairs went well with the following visitors numbers, based on registration forms received. (Note that the actual number of visitors was higher than the numbers recorded below as some people declined to fill in the registration and others accompanied their relatives but only one person filled in a form).

1,000 visitors in HCM City
400 visitors in Ha Noi City

Although the number of visitors to the fair both in Ha Noi and Ho Chi Minh City were similar to figures from last year, feedback from the institutions and attending agents confirmed that both the quantity and quality of visitors was better than last year. Visitors knew what they wanted and approached the institutions with direct and focussed questions. Some institutions were happy to announce that they had secured solid interest from suitably committed students as a result of the fairs.

2.9 De-briefing with New Zealand Representatives

A final debrief was held after the Ho Chi Minh City fair on June 17. Institutions gave feedback at the debrief on each city as follows:

In Ha Noi:

- Although the numbers were less than in Ho Chi Minh City, some commented that the quality of visitors was good.
- The Melia Hotel provided good accommodation and good food. The hotel services were also good and it was recommended that the same venue be used for the fair next year.

- They were happy with the quality of the interpreters.
- Suggest having a school name tag
- Asked to receive fair information from ENZ earlier.
- Using tables instead of booths was suggested as a way of cutting costs.
- A half day fair in Ha Noi was also suggested as a way of cutting costs

In Ho Chi Minh:

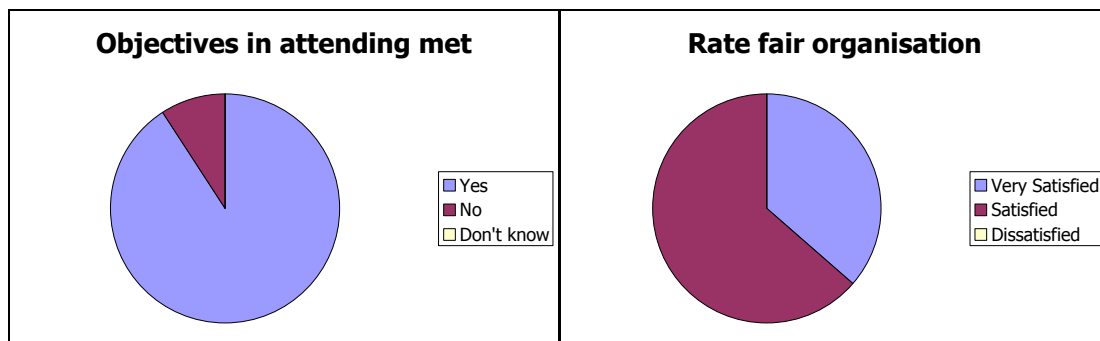
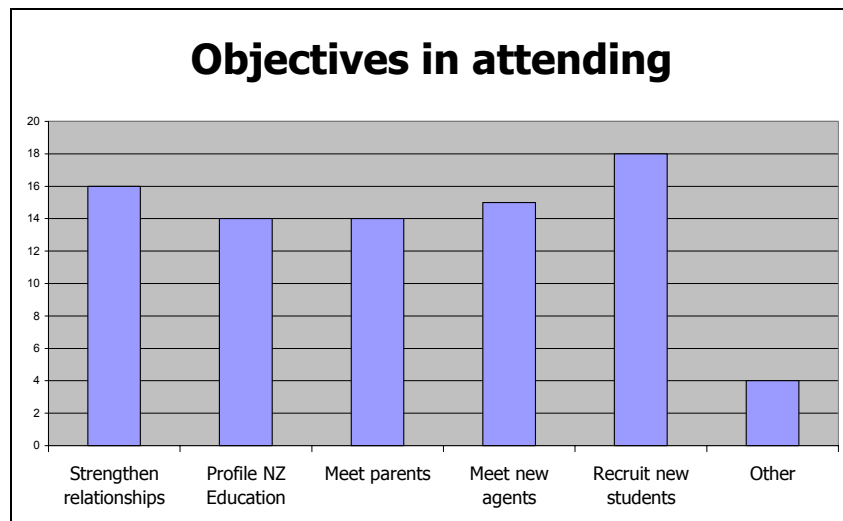
- Institutions were pleased with the number of visitors to the fair from the perspective of both quality and quantity. The fact that many parents came with their children demonstrated the serious interest by the visitors.
- The service from the Sheraton hotel was good and it was suggested to be used for the fair next year.
- Participants were happy with the quality of the interpreters.
- The design and quality of the branding was noted again.
- The advertising was noted as being effective.
- Suggest having a school name tag
- Asked to receive fair information from ENZ earlier
- It was suggested that booths be kept in HCM so as to better showcase the New Zealand brand.
- It was agreed that the fair continue to run for the entire day.

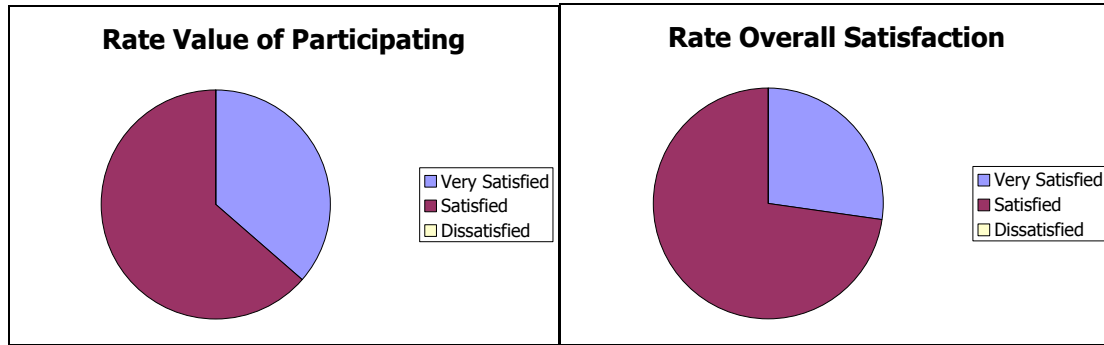
3. Summary of Participants' Evaluations

Education New Zealand received 11 evaluations of the Vietnamese fair series. Comments that have not arisen elsewhere in this report are summarised below.

- ✍ Agent workshops, functions, interpreters, venue design, branding all very successful
- ✍ A preference to the New World hotel over the Sheraton was mentioned twice
- ✍ Participants would like more information in advance including
 - List of participating institutions and representatives
 - List of agents attending the workshops
 - Detailed information regarding the agents' awards
- ✍ The shared booth option in Ho Chi Minh should have been wider rather than deeper
- ✍ Suggestion of a regional floor plan allocation rather than by sector. Visitors didn't seem to understand the colour and sector descriptions, so perhaps also add in Vietnamese which sector the participant was from?

Graphs summarising Evaluation Form feedback





4. Recommendations for Future Events

Once again the education fairs in Viet Nam have been a solid success, despite a huge amount of competitive activity in recent times. Participants commented that the quality of students was better than last year. The use of TV ads, student leaflet distributors and websites are new initiatives in attracting students to the fairs. Efforts to make full use of the 'New Zealand Educated' branding were well received by participants, agents and the general public alike.

Recommendations:

- Keep the Melia and Sheraton hotels for the fairs next year in Ha Noi and HCM City respectively
- Information distributed earlier
- School name tags produced
- Look at the use of tables instead of booths and potentially a half day fair for Ha Noi
- No significant changes to the HCM fair

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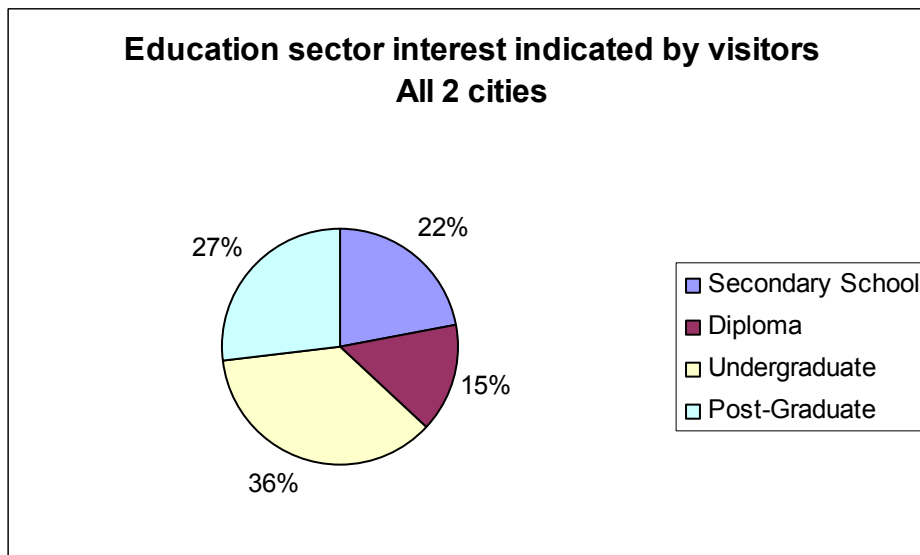
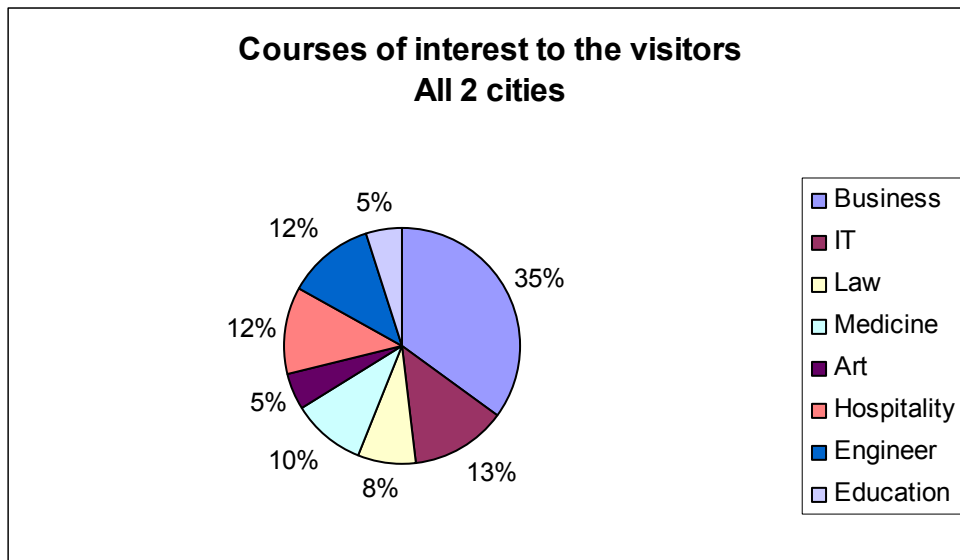
Appendix A: Visitor Data

Statistical and Demographic Data

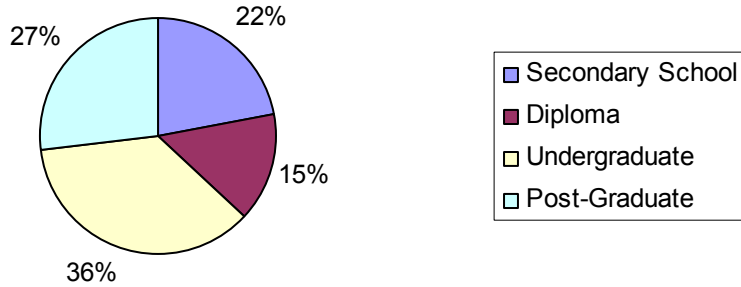
+ Visitor Analysis:

Registration forms were prepared for the Fair to capture some information about the interests of the visitors to the fairs.

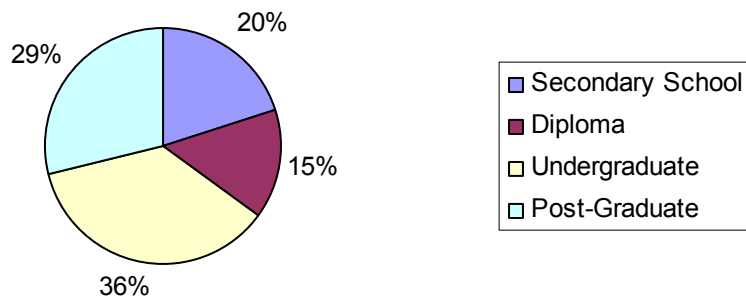
Visitors Analysis in Ha Noi and Ho Chi Minh City - June Fair 2007:



**Education sector interest indicated by visitors
Ho Chi Minh City**



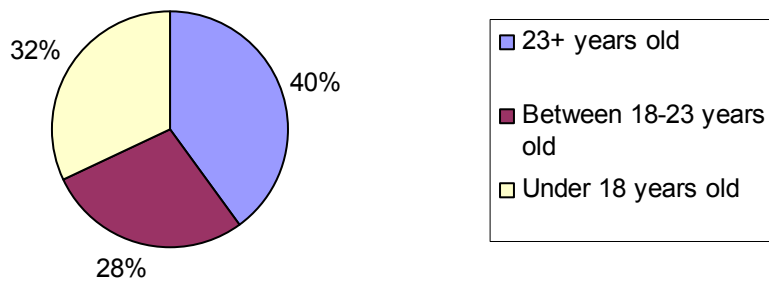
**Education sector interest indicated by visitors
Ha Noi**



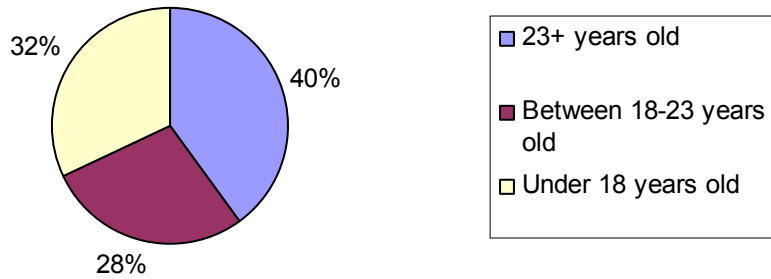
Age Profiles:

Total 2 cities

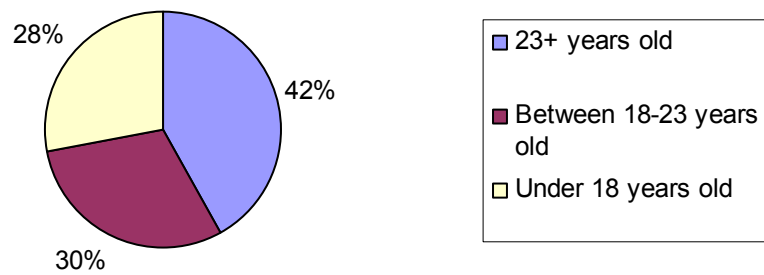
**Exhibition Visitors - Age Profile
Total 2 cities: HCMC, Ha Noi**



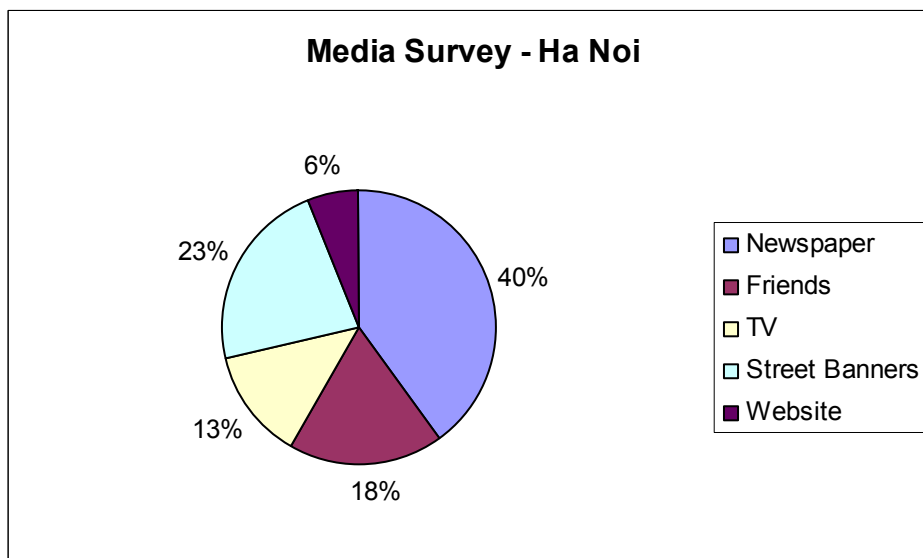
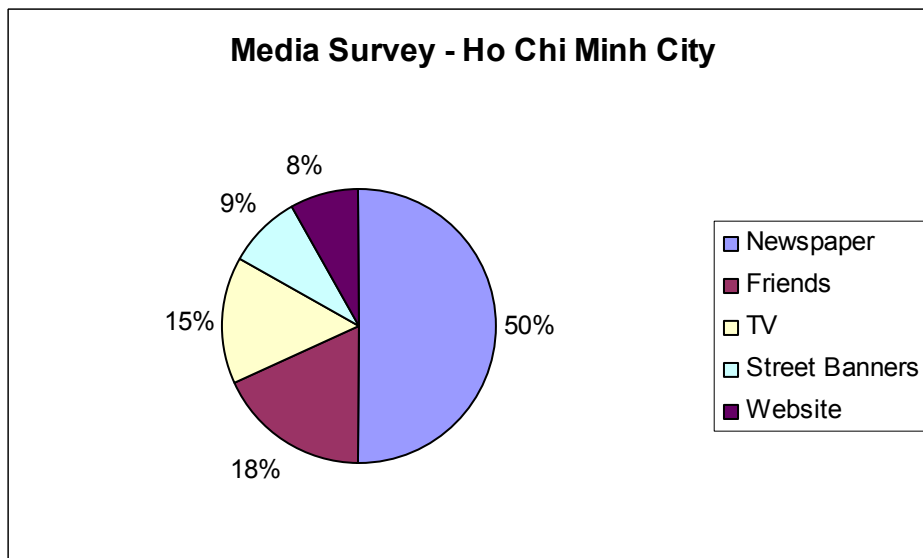
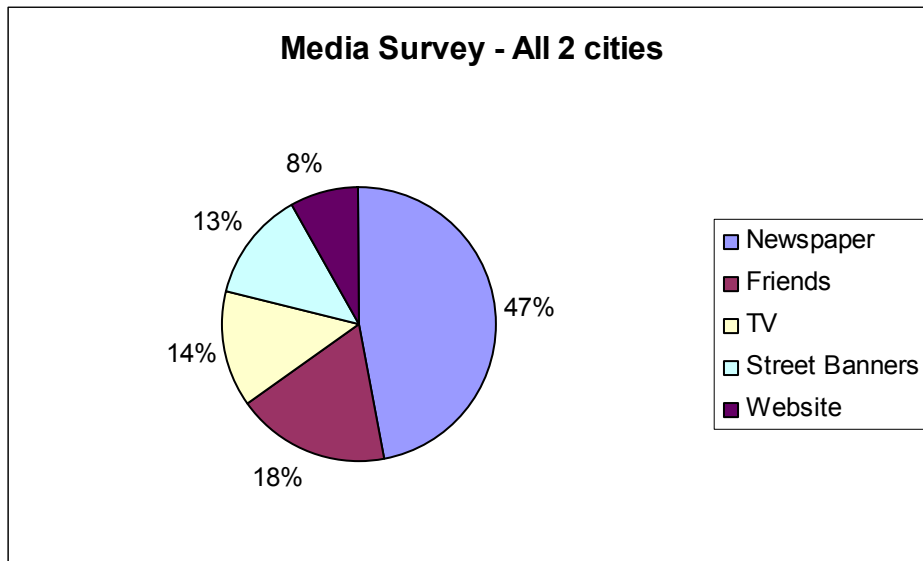
**Exhibition Visitors - Age Profile
Ho Chi Minh City**



**Exhibition Visitors - Age Profile
Ha Noi**



Media Analysis



Appendix B: Further documents & images

Documents handed out to participants in Vietnam were as follows. These can be re-supplied by ENZ on request:

Education Sector Profile for Vietnam.doc

Programme for June 2007 fairs.doc

List of Education Agents in HCM and Ha Noi.doc

Fair Images:

Print ad:

**Triển Lãm Giáo Dục
New Zealand 2007**

Với sự tham gia của hơn 30 trường Đại học, Trung học và Anh ngữ danh tiếng

- Triển lãm giáo dục lớn nhất trong năm của New Zealand với số lượng trường tham gia đông nhất.
- Cơ hội gặp gỡ với đại diện các trường để có sự chọn lựa du học phù hợp nhất.
- Cơ hội tìm hiểu về nền giáo dục cao cấp, môi trường an toàn và cộng đồng dân cư thân thiện, hiếu khách.
- Cơ hội du học để chuẩn bị cho một tương lai thành công tốt đẹp.

Tại Hà Nội:
Thời gian: Từ 9h00 đến 17h00, ngày thứ Bảy 16/06/2007
Địa Điểm: K/s Melia, số 44B Lý Thường Kiệt, Tp. Hà Nội

Tại Tp. Hồ Chí Minh:
Thời gian: Từ 9h00 đến 17h00, ngày Chủ Nhật 17/06/2007
Địa Điểm: K/s Sheraton, số 88 Đồng Khởi, Quận 1, Tp. Hồ Chí Minh

Vào cửa tự do

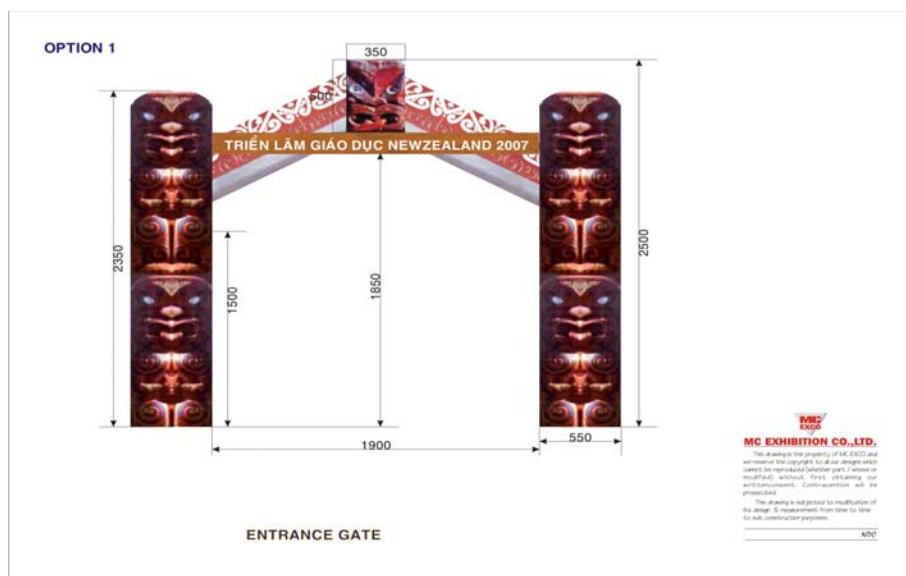
Vui lòng liên hệ:
Tổng lãnh sự quán New Zealand
Phường Cầu Giấy, Tầng 5, Phòng 509
Tòa nhà Metropolitan
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Cơ hội rút thăm trúng thưởng các khóa học Anh ngữ miễn phí tại trung tâm Apollo và nhiều quà tặng khác.

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