



Award date: 2016-01-26
Contract # 08324-150460/001/CY
POR 036-15



Global Affairs Canada Education Brand Refresh

Executive Summary October 2016

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Mike Colledge
President
Ipsos Public Affairs

Executive Summary

Background and Introduction

After seven years of using the same brand and key messages, the International Education Division at Global Affairs Canada has hired the global marketing firm of Ogilvy & Mather to refresh its education brand and develop a three-year Integrated Marketing Plan to raise international awareness about the world-class education and research opportunities available in Canada.

The Education Brand Refresh and Integrated Marketing Plan initiative is a major milestone of the International Education Strategy (IES) launched by Global Affairs Canada in 2014. Findings from this research will be used by the International Education Division to improve creative concepts and targeted messaging.

This report details the results of this research, conducted in two parts, qualitative and quantitative, between March 2016 and April 2016. The total contract value of this research was \$198,089.00 including HST.

The key audiences for this study include those interested in studying abroad in the future as well as their parents and other influencers for these decisions. The major characteristics of each target audience are as follows:

- **Undergraduate students:** Secondary, college or university students who indicate an interest in studying abroad during their post-secondary studies, referred throughout the report as undergraduate students for readability;
- **Graduate students:** University students at the undergraduate who indicate an interest in studying abroad for their graduate studies and graduate students or Researchers who indicate an interest in studying or conducting research abroad as part of their Graduate or Post-Graduate studies; and,
- **Parents:** Parents of current high school students interested in studying abroad in grade 10, 11 or 12.

Objectives

The objectives of this research were to:

- To determine which of a series of images presented are most effective in eliciting a strong emotional response from target audience members;
- To ensure that copy proposed for each of the concepts resonates with the intended targeted audiences in each market;
- To determine the creative concepts effectiveness in reaching the target audiences in each market; and
- To provide Global Affairs Canada and the marketing firm with the opportunity to revise the proposed concepts to ensure appropriateness and visual appeal.



Methodology

Overview of Methodology

This research was conducted in two phases:

- **Global Advisor** – Ipsos added three questions to the Global Advisor online omnibus style syndicated study in two markets, India and Mexico. Fieldwork was conducted between February 19th, 2016 and March 4th, 2016. This provided quantitative benchmarks for interest in Canada and important communications channels among the general public and key audiences for this research.
- **Focus Groups** – Ipsos conducted 15 focus groups between April 6th and April 14th, 2016 among three audiences in six different markets: Brazil, China, India, Mexico, Morocco and Vietnam. Focus groups evaluated the effectiveness of creative concepts and provided an opportunity to test the resonance and appropriateness of concepts in these markets.

Quantitative Survey

The quantitative research took the form of an online survey using Ipsos Global Advisor, conducted in two of the priority markets: India and Mexico. In each market, participants invited to complete the online survey were drawn from Ipsos and local vendor panel sample and screened according to the target audience required (students and parents with an interest in overseas educational opportunities).

The sample in each market is constructed of online panel sample. The final data collected through this survey vehicle is weighted in most markets to gender, age and education. The following table outlines the overall sample sizes achievable in each market, should no screening screen-out criteria be applied.

Country	Overall Sample size	Language	Representation	Definition
Mexico	500	Spanish	Primary Consumer	Completed primary education or higher, have Internet access
India	500	English	Online Population	Have Internet access

The survey was open (with no screen-outs) to allow for a more robust overall sample size within each market. It was likely that within the target audience definitions to be applied (students and parents of students interested in studying abroad), the final sample sizes of specific target audiences would be much smaller in each market given the lower incidence of these niche populations in the overall sample.

It should be noted that the quantitative findings are not generalizable to a larger population, and that they should be considered directional only.

Qualitative Focus Groups

The table below indicates the country, market, audiences as well as language of moderation for the 15 focus groups that were conducted. For sessions conducted in India and Morocco, Ipsos Canada worked in close collaboration with Ipsos in-market researchers to ensure optimum language of moderation choices to suit these specific markets. All screeners and guides were translated into the local language for reference by the in-country project team and moderators. Pre-research briefings were held with each in-market team to ensure consistency in the approach, regardless of geography.

It should be noted that the qualitative findings are not generalizable to a larger population, and that they should be considered directional only.

Country / Market	Language	Audience
Sao Paulo, Brazil	Portuguese (Brazilian style)	<ul style="list-style-type: none"> Secondary/Post-secondary students (college/university undergraduates) Graduate students
Beijing, China	Text: Simplified Chinese Group: Mandarin	<ul style="list-style-type: none"> Secondary/Post-secondary students (college/university undergraduates) Graduate students Parents of students in high school, potentially interested in studying abroad in grade 10, 11 or 12 (one group among parents)
New Delhi, India	Hindi &/or English	<ul style="list-style-type: none"> Secondary/Post-secondary students (college/university undergraduates) Graduate students
Mexico City, Mexico	Spanish	<ul style="list-style-type: none"> Secondary/Post-secondary students (college/university undergraduates) Graduate students Parents of students in high school, potentially interested in studying abroad in grade 10, 11 or 12 (one group among parents)
Casablanca, Morocco	French &/or Arabic (local style)	<ul style="list-style-type: none"> Secondary/Post-secondary students (college/university undergraduates) Graduate students
Ho Chi Minh City, Vietnam	Vietnamese	<ul style="list-style-type: none"> Secondary/Post-secondary students (college/university undergraduates) Graduate students Parents of students in high school, potentially interested in studying abroad in grade 10, 11 or 12 (one group among parents)

Recruitment and Screener

Ipsos randomly recruited participants in this research through a variety of means:

- In-person intercepts, likely to be conducted on university campuses, designed to randomly select and screen students to participate in a focus group;
- Telephone recruitment, designed to identify parents of prospective international students; and,
- Listed sample: contact lists maintained by Ipsos partners' in-country.



Incentives/honoraria

For the qualitative focus groups, Ipsos-Reid provided an honorarium of \$100 CDN equivalent in local market currency (on average) to participants to attend the focus groups in order to encourage full attendance.

This Report

This report contains the findings from the qualitative discussion group sessions only, which include a reflection on a series of imagery as well as the creative concepts. Results of the quantitative survey are included in an Appendix to this document.

Key Findings

Studying abroad

There are many aspects to the factors that incite interest in studying abroad, both in terms of the perceived deficits in one's home country, and the perceived attractions of a particular country as a study destination. These included:

- The quality of education offered, including the ranking and renown of a particular institution and its program of study;
- The day-to-day environment of living abroad, including opportunities for socialization, but also safety, security, familiarity, and tolerance;
- The anticipated experiences offered by living abroad, such as opportunities for travel and leisure activities;
- The anticipated opportunities for post-study career opportunities, both domestically and abroad, as well as the possibility of immigration.

These themes were regularly discussed through the evaluation of concepts as well as discussion around education opportunities in Canada and elsewhere. For example, the extent to which both the Journey Concept and Proof Concept were seen as credible by participants, either in terms of its narrative and/or the protagonist (including their physical characteristics and name), related to how well they could connect the experiences and information conveyed to their own situation.

While some commonalities were identified across markets in relation to the factors that incite interest in studying abroad, differences emerged among individual markets both in terms of certain factors, as well as the weight accorded to them. For example, obtaining a superior education in terms of the facilities at the institution as well as practical knowledge were particularly valued by participants in Vietnam, India, and China. Other common reasons included improving one's language skills, broadening one's horizons through exposure to other cultures, and aspirations to a better life.

Summary of Feedback, by Market

Brazil	<ul style="list-style-type: none">– Protagonist should reflect the status of the individual (as a PhD student, business owner, etc)– Image of protagonist should not be disproportionately larger than the other content– Concept should have a singular focus only (merits of Canada as an academic
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	<ul style="list-style-type: none"> destination) – Topic of study should be broad enough to appeal to those with an interest beyond a specific field of study (e.g. International Relations, Engineering) – Narrative and imagery should be in sync, with a focus on education – Concept should be engaging and inclusive in nature in order to be considered relevant – Identifying the sponsor of the initiative as the Government of Canada was viewed as enhancing its credibility
China	<ul style="list-style-type: none"> – Images depicting landscapes and social activities – Family images evoked feelings of happiness, relaxation and warmth – Concept should depict more ‘convincing’ success stories Names must be realistic, not “too fake” – Protagonist should reflect the status of the individual (as a PhD student, business owner, etc) – Environment depicting students of various cultures together was considered appealing – Topic of study should be broad enough to appeal to those with an interest beyond a specific field of study (e.g. International Relations, Engineering) – Value elements of multiculturalism and diversity – Include more information about life in Canada and educational institutions – Should not include “arrogant” or unsubstantiated claims for which evidence is not readily presented (e.g. “18,000 reasons”)
Mexico	<ul style="list-style-type: none"> – Protagonist should reflect the status of the individual (as a PhD student, business owner, etc) – Emphasis of narrative should be on Canada, not an individual – Image of protagonist should not be disproportionately larger than the other content – Include description of non-academic aspects of studying in Canada (e.g. social environment, sports, culture, etc) – Narrative should tie together what Canadian educational institutions can provide and what can result/be achieved from studying in Canada – Distinguishing elements (such as mention of Nobel Prize-winning professors) were appealing – Should not include “arrogant” or unsubstantiated claims for which evidence is not readily presented (e.g. “18,000 reasons”) – Formality of the concept is considered to establish trust – Identifying the sponsor of the initiative as the Government of Canada was viewed as enhancing its credibility
Morocco	<ul style="list-style-type: none"> – Names must be realistic, not “too perfect” – Protagonist should reflect the status of the individual (as a PhD student, business owner, etc) – Topic of study should be broad enough to appeal to those with an interest beyond a specific field of study (e.g. International Relations, Engineering) – Narrative and imagery should be in sync, with a focus on education – Narrative should contain details around claims, particularly those signifying ‘success’ (e.g. such as starting a business) – Should not include “arrogant” or unsubstantiated claims for which evidence is not readily presented (e.g. “18,000 reasons”)



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India	<ul style="list-style-type: none"> – Value elements of multiculturalism and diversity – Emphasis on protagonist’s experience was considered credible and realistic – Imagery suggesting practical experience while studying was considered appealing – Narrative and imagery should be in sync, with a focus on education – Protagonist was relatable and the narrative – Should not include “arrogant” or unsubstantiated claims for which evidence is not readily presented (e.g. “18,000 reasons”) – Claims about number of educational institutions was considered intriguing and prompted interest in seeking further information about education in Canada
Vietnam	<ul style="list-style-type: none"> – Protagonist should reflect the status of the individual (as a PhD student, business owner, etc) – Ambitious narrative shows credibility – Value elements of multiculturalism and diversity – Topic of study should be broad enough to appeal to those with an interest beyond a specific field of study (e.g. International Relations, Engineering) – Narrative and imagery highlighting opportunities for exposure to a society that values social integration and multiculturalism – Conveying aspirations for a better life was seen as highly relevant – Should not include “arrogant” or unsubstantiated claims for which evidence is not readily presented (e.g. “18,000 reasons”) – Demonstrate benefits of having a qualified pool of lecturers, why Canada should be viewed as being among best in world, opportunities available to students after graduation

Summary of Feedback, by Audience

Undergraduates	<ul style="list-style-type: none"> – Looking for a credible story that is not overly ambitious or unbelievable (across markets) – Information/claims that can be validated on a website – Images depicting landscapes and social activities – Topic of study should be broad enough to appeal to those with an interest beyond a specific field of study (e.g. International Relations, Engineering) – Concept should have a singular focus only (merits of Canada as an academic destination) – Narrative and imagery highlighting opportunities for exposure to a society that values social integration and multiculturalism – Include description of non-academic aspects of studying in Canada (e.g. social environment, sports, culture, etc) – Narrative should tie together what Canadian educational institutions can provide and what can result/be achieved from studying in Canada – Concept should be engaging and inclusive in nature in order to be considered relevant – Should not include “arrogant” or unsubstantiated claims for which evidence is not readily presented (e.g. “18,000 reasons”)
Graduates	<ul style="list-style-type: none"> – Images depicting landscapes and social activities – Concept should have a singular focus only (merits of Canada as an academic destination)

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	<ul style="list-style-type: none"> – Narrative should contain details around claims, particularly those signifying ‘success’ (e.g. such as starting a business) – Include description of non-academic aspects of studying in Canada (e.g. social environment, sports, culture, etc) – Narrative should tie together what Canadian educational institutions can provide and what can result/be achieved from studying in Canada – Formality of the concept is considered to establish trust – Demonstrate benefits of having a qualified pool of lecturers, why Canada should be viewed as being among best in world, opportunities available to students after graduation
Parents	<ul style="list-style-type: none"> – Looking for a credible story that is not overly ambitious, unbelievable or costly to pursue (Mexico) – Protagonist is expected to be professional-looking (Mexico) – Environment depicting students of various cultures together was considered appealing (China) – Use elements to convey peace-of-mind to parents that their children will be taken care of – Include more information about life in Canada and educational institutions – Offer new information about Canada that is different to what is stereotypically known – Concepts should aim at appropriate target audience of parents of older children (not necessarily younger children interested in a foreign exchange program) (Mexico) – Value opportunity for children to improve their English-language skills

Interest in studying in Canada compared to other destinations

The U.S. and the U.K. were almost universally viewed as being the gold standard for a high-quality education, with some participants demonstrating detailed knowledge of which programs were perceived to be the best in these countries. Generally, Canada was viewed as being somewhat less-known.

In terms of other, non-educational considerations, however, Canada was favourably viewed for its affordability, quality of life, job opportunities, and favourable immigration policies.

Online sources (such as Google, specialist websites, and the websites of institutions) were considered an important source of information about target destinations and programs. Word-of-mouth was also considered an important source, particularly in Vietnam and Morocco.

Key strengths and weaknesses of Canada as a destination

The high quality of life, safety, and security were universally viewed as one of Canada’s strengths, followed by Canada’s favourable policies and practices in terms of immigrating and obtaining a visa.

The universal weakness as related by focus group participants of Canada was perceived to be its harsh and icy climate.



Imagery

Most appealing elements of the imagery

There are several broad categories in which the imagery and the Concepts which held the most appeal across markets can be classified:

- Aspirational experience anticipated by participants at the target destination (including opportunities for travel and leisure), and post-graduation success (including eventual immigration to the target country);
- The extent to which participants could imagine themselves in various settings; and
- Differentiation of the participant's own environment (including physical surroundings as well as characteristics of academic life, such as opportunities for practical knowledge and working closely with professors), often expressed in comparisons with the home country.

Least appealing elements of the imagery

The categories of elements deemed less appealing across markets were often the absence or converse of those that were most appealing to participants:

- Lack of ability to relate, both in terms of images that depicted less than ideal situations (such as working in isolation), as well as aspects of the protagonist featured in the Journey Concept (ranging from their physical appearance to aspects of the narrative not being credible);
- Lack of differentiation from their home environment, ranging from images depicting landscapes to those of classroom or work places deemed too similar to their current surroundings; and
- Perceived irrelevance to education also emerged as a justification for finding particular images to be less appealing.

Reactions to Concepts

Perhaps due to the importance placed on a personal connection and the ability to put themselves in the imagery, participants in most markets and audiences generally preferred the Proof Concept over that of Journey in terms of content and, to some degree, format. The Proof Concept highlighted opportunities for them, such as the wide range of programs available or quality education. In certain markets, participants perceived the protagonist in the Journey Concepts to be an actual person, rather than interpreting the individual as a composite image.

Suggestions for improving both Concepts often reflected the factors that participants had considered to be most important in considering studying abroad, in terms of both text and images. For example, participants suggested including images of group work (such as in Image 10) and practical experience (Image 26), as well as achievement (Image 36) and opportunities for leisure (Image 13), reflecting the importance of aspiration as a factor.



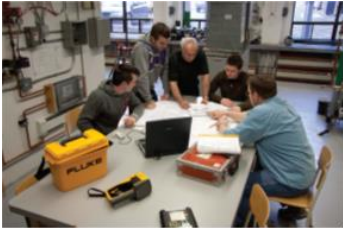


Image 10

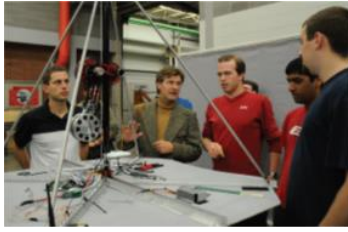


Image 26



Image 36



Image 13

Other improvements to both Concepts included revising claims that may lead to disbelief and skepticism (such as the reference to 18,000 programs being offered in Canada in the Proof Concept, or the establishment of one's own company in the Journey Concept).

Suggested Improvements

The elements considered most appealing in both text and images were those reflecting aspiration, in terms of the experiences participants hoped to have both in the short-term (i.e., the academic and leisure experiences) and the long-term (improved prospects both personally and professionally).

Of the two Concepts, Proof was most widely preferred across markets and audiences. Recommended revisions to this Concept include providing more information about Nobel Laureates and Field Medallists (in that shown to graduates), and having a less “boastful” tone.

Concepts should reflect the importance of various factors that were considered important in individual markets, as well as those that are important to specific audiences. For example, Parents in various markets placed more importance on elements relating to the safety and comfort of their children, while graduates were more concerned about the quality of education and job prospects. Undergraduates were interested in student life and experiences available.

We suggest revising the Journey Concept to include photos that demonstrate a more “credible” connection to a student, perhaps taken by friends or family, as well as a more average story, perhaps in a more familiar tone. The Proof Concept could also be revised to demonstrate the inclusion of the viewer and how the facts presented would impact them if they were to choose Canada as a study destination.

Recommendations

No Clear Front Runner

While the Proof Concept was narrowly preferred overall across markets and audience groups, neither creative concept was a clear front-runner in terms of attracting target audience attention or conveying the benefits of pursuing further education in Canada. A creative campaign utilizing either of these creative concepts, in their current format or containing their current copy, would not be recommended.

Online websites are key source of information about studying abroad

As online sources (such as Google, specialist websites, and the websites of educational institutions) were considered important sources of information about target destinations and programs, a digital creative campaign may provide greater flexibility to communicate market or audience specific messages, as well as the adaptability to customize the imagery used to convey these messages.

Accessible, searchable content provides opportunity to continue 'the story'

The use of multilingual micro-websites to host information which is searchable and easily accessible would be an effective means to continue an online engagement with interested audiences. The opportunity to share stories, of real individuals from abroad who have studied in Canada, would add credibility to the messages and reflect a more approachable, familiar tone expressed from a students' perspective.

Opportunities presented by social media

The rise of social media and the 24/7 nature of personal mobile connection is having a major impact on communications and marketing efforts. As social media increasingly represents a crucial forum for public dialogue and conversation, we would recommend including a social media component to the digital communications strategy. This not only provides an efficient, customizable, and adaptable approach to communicating with the target audiences, but also provides a mechanism to track engagement online using social media analytics.

Getting the right message and tone

Combining social media activity with a first-person story perspective (real-life experience such as 'day in the life of' student profile) will foster the more authentic connection between the target audience and the experience of studying in Canada that participants were looking for.



Summary of Feedback

In evaluating the effectiveness of the headlines and the creative concepts, both the reasons for studying abroad and the factors to consider when thinking of doing so played a role in participants' reactions. While certain commonalities were found across markets and audiences, differences also emerged, based on the extent to which themes presented in the materials reflected or related to participants' expectations and aspirations of studying abroad.

There are different factors that initially incite interest in studying abroad and others that drive students to study in a particular country. Each of these different motivators for studying abroad are important in understanding students' and parents' reactions to the images and concepts. Generally speaking, there are two types of motivators, both of which are reflected across a variety of topics addressed in the discussions: those that attract participants to consider studying abroad, and those that encourage them to look outside their home country, such as environment, experience, and opportunities not available at home. Motivators that encourage study abroad are particularly important as they help differentiate Canada as a market for study-abroad experiences, and may be glimpsed in participants' preference for images which are different from their home country (such as those featuring landscapes) and the lack of appeal of images of those which "could be anywhere" or reminded them of home (such as that of the walkway).

While these factors are important, the predominant consideration among participants across markets was that of obtaining value for money and a return on the investment extending well beyond the time spent in the program of study. Consequently, other considerations included:

- **Post-study job placements, career opportunities and immigration:** Even among participants who did not plan on remaining permanently in the country in which they were studying (such as those in India and Brazil), many still envisioned acquiring some work experience in that country as a way of enhancing their opportunities. For participants in Vietnam and China, however, possibilities of immigration were even given greater weight.
- **Safety and security/Familiarity/Attitude of tolerance:** For participants in Vietnam, China, and Mexico, the safety and security of both the campus and the country in general emerged as important considerations, particularly among parents. While not directly related to safety, familiarity was also viewed as providing a degree of comfort that was valued among some participants, such as those in India. Participants in China also mentioned the importance of a friendly attitude towards the Chinese.
- **Cultural and social life, including travel:** For many participants, the cultural and social life of the target country was also a key consideration. The importance of this consideration was also evident in the justifications offered for preferring images reflecting elements of social life (such as those depicting interactions with peers) and cultural experiences (such as natural landscapes, travel, and adventure) which emerged in both the imagery and the Concept testing segments of the discussions.
- **Quality of the institution:** While related to the ranking of the institution, this consideration also included features such as equipment and opportunities for gaining practical experience.

- **Ranking and renown of the academic institution/program of study:** The ranking of the institution was deemed to be a very important factor in several markets, as it was viewed as being closely associated with future job opportunities, as well as the importance of obtaining professional recognition. The renown of specific degree programs within institutions was also considered to be important, particularly among graduates who were interested in working with specific professors. However, the renown of an institution was often weighed in relation to the cost of studying at a particular institution.

