



VIETNAM VOICES

Consumer Attitudes Towards Transnational
Education (TNE) in Vietnam

Table of Contents

- ➔ 03 Executive Summary
- ➔ 04 Introduction and Overview of TNE in Vietnam
- ➔ 06 Goals of the Survey
- ➔ 07 Our Research Provider
- ➔ 08 Research Methodology
- ➔ 10 Survey Results
- ➔ 28 Key Insights
- ➔ 29 Conclusion & Recommendations
- ➔ 30 About Acumen – Our Services in Vietnam



Executive Summary

Vietnam has emerged as a key market for international education in recent years, with almost 200,000 Vietnamese students studying overseas each year.

At the same time, Vietnam's education system is also undergoing rapid transformation and internationalisation. This is leading to huge interest in opportunities for Transnational Education (TNE) – to deliver international tertiary level programs in Vietnam.

In response, Acumen commissioned this first ever public survey focused on the Transnational Education (TNE) market in Vietnam, working with our research partner YouGov Decision Lab. We surveyed over 1000 parents, at certain income levels and with children in the range of 8–22 years.

Why:

The market demand for TNE programs in Vietnam

Who:

Who are the key decision makers in choosing college/university (hypothesis = it is the parents)

What:

Parents attitudes towards TNE programs, including what they are prepared to pay for TNE programs

How:

The best channels and messages to engage parents

The results offer a fascinating insight into how the market views TNE programs, with actionable intelligence for institutions considering TNE in Vietnam.

For example:

- ▶ Parents remain the key decision makers in selecting college/university for their children (in 82% of cases)
- ▶ 85% of parents surveyed indicated an openness to TNE in Vietnam (as one potential option)
- ▶ The US ranks highest as the preferred country for TNE programs, followed by Australia and the UK
- ▶ There is a stronger preference (and market) for TNE in the 6 key cities of Vietnam compared to other parts of the country
- ▶ Official offline channels (rather than social media) are the most influential for convincing parents about TNE programs

Introduction & Overview of TNE in Vietnam

Vietnam has emerged in recent years as a key source market for international students for institutions in Australia, US, Canada, New Zealand, UK and elsewhere. Vietnam is the 9th largest source of international students globally, and a top #5 market globally for Australia, Canada and New Zealand.

More than 40% of all higher education students from Southeast Asia to the US and Canada are Vietnamese.

This growth – and ongoing excitement about Vietnam as an important market for international education – is underpinned by a number of key drivers including:



These same drivers are also driving growth in international higher education programs (Transnational Education or TNE programs) delivered partly or fully in Vietnam.

There are more than 400 joint programs approved between Vietnamese and international institutions, and 5 foreign invested campuses (including RMIT and British University Vietnam). At least 15,000 students are now studying Australian programs in Vietnam, with the UK, US and New Zealand also offering many programs.

As incomes grow, Acumen assesses that demand will continue to grow among the middle/upper middle class for international programs delivered partly or fully in Vietnam.

To test this, in partnership with YouGov, Acumen commissioned and designed the survey “TNE Opportunities in Vietnam” of more than 1000 parents. This is the first ever market survey focused exclusively on consumers’ attitudes towards transnational education in Vietnam.





Goals of the Survey

Acumen commissioned this survey with our research partner YouGov Decision Lab to understand:

- Market interest in TNE programs in Vietnam
- Who are the key decision makers in choosing college/university (hypothesis = parents)
- Parents attitudes towards TNE programs
- The best channels and messages to engage parents

Questions:

- Is there a growing market for TNE in Vietnam?
- Who are the decision makers choosing the study destination (e.g. study domestically, study international in Vietnam or study abroad?)
- What are the key drivers for these decisions?
- Where is the market?
- What are families prepared to pay for international study in Vietnam?
- Which countries are preferred for international programs delivered in Vietnam?
- Which sources of information are the most influential for decision makers to make their decision?
- What are the pros and cons of TNE programs and how can these be addressed?

Our survey findings offer unique insights for those considering TNE programs in Vietnam.

About Our Research Provider

YouGov® | Decision Lab

YouGov Decision Lab is a partnership committed to driving new thinking and technology in marketing with Vietnam's most modern market research offering. Combining Decision Lab's thought leadership and problem-crunching capability with the industry's strongest data solutions provides a best-in-class offering for leading innovative brands that are ready to transform with the changing market conditions.

Decision Lab – the only boutique agency in the country – is well-known for its thought leadership in digital media and understanding of a new generation of consumers. Since 2016, the agency has been driven by global technology partners and a sought-after talent programme. It has also worked with some of the most forward-thinking multinational and global brands as well as leading global tech giants.

YouGov is a global leader in delivering living consumer data to brands. This is made possible through innovative data solutions allowing brands to react faster and with more in-depth understanding of market changes and new trends.

Decision Lab is the exclusive partner of YouGov in Vietnam.

**150,000
total
panelists.**



Vietnam



**10,000+
background
variables**

**Highly
responsive**



**3-5
days
fieldwork**



Research Methodology

QUANTITATIVE



1005

TOTAL SAMPLE SIZE



15 MINS

INTERVIEW LENGTH



20%

INCIDENT RATE

Target profile

TARGET

Both genders

Age: parents with kids between 8 to 22 years old

SEC (monthly disposable household income): ABCD

- SEC D: Under VND 10mil
- SEC C: VND 10mil – under VND 15mil
- SEC B: VND 15mil – under VND 22.5mil
- SEC A: VND 22.5mil and above

Location: Nationwide

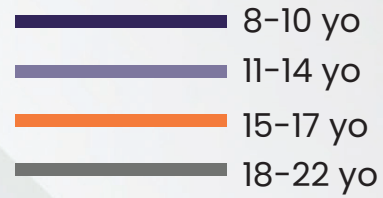
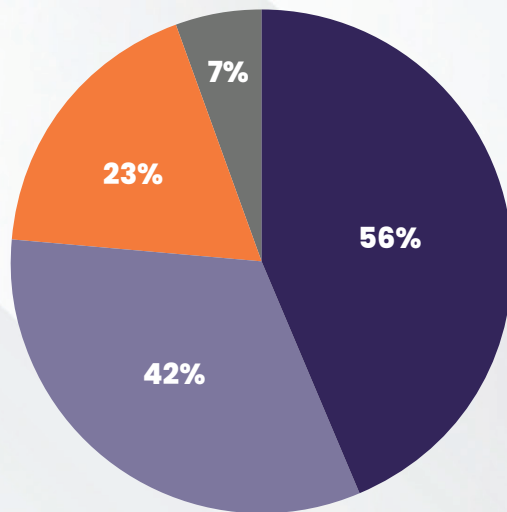
Behaviors:

- Main and joint decision-makers in the education of their children
- Intends to/Have plans to let their children study in an international programs and / or studying abroad

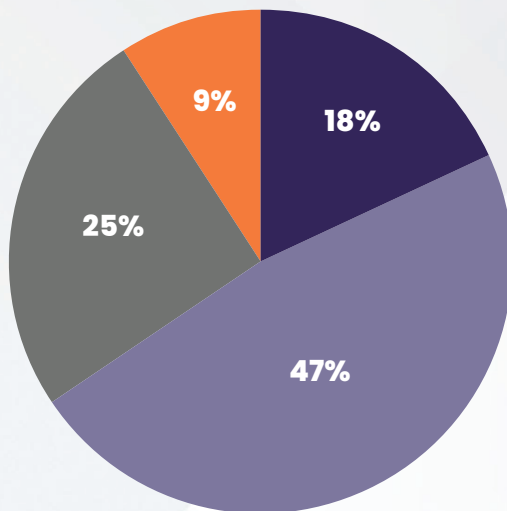


Sample size overview

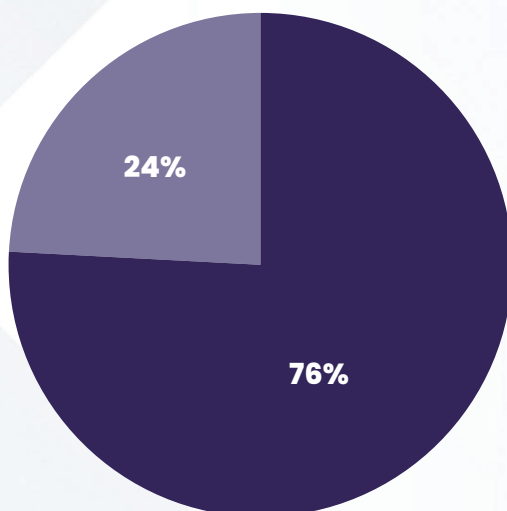
CHILD'S AGE GROUP



MONTHLY HOUSEHOLD INCOME



LOCATION

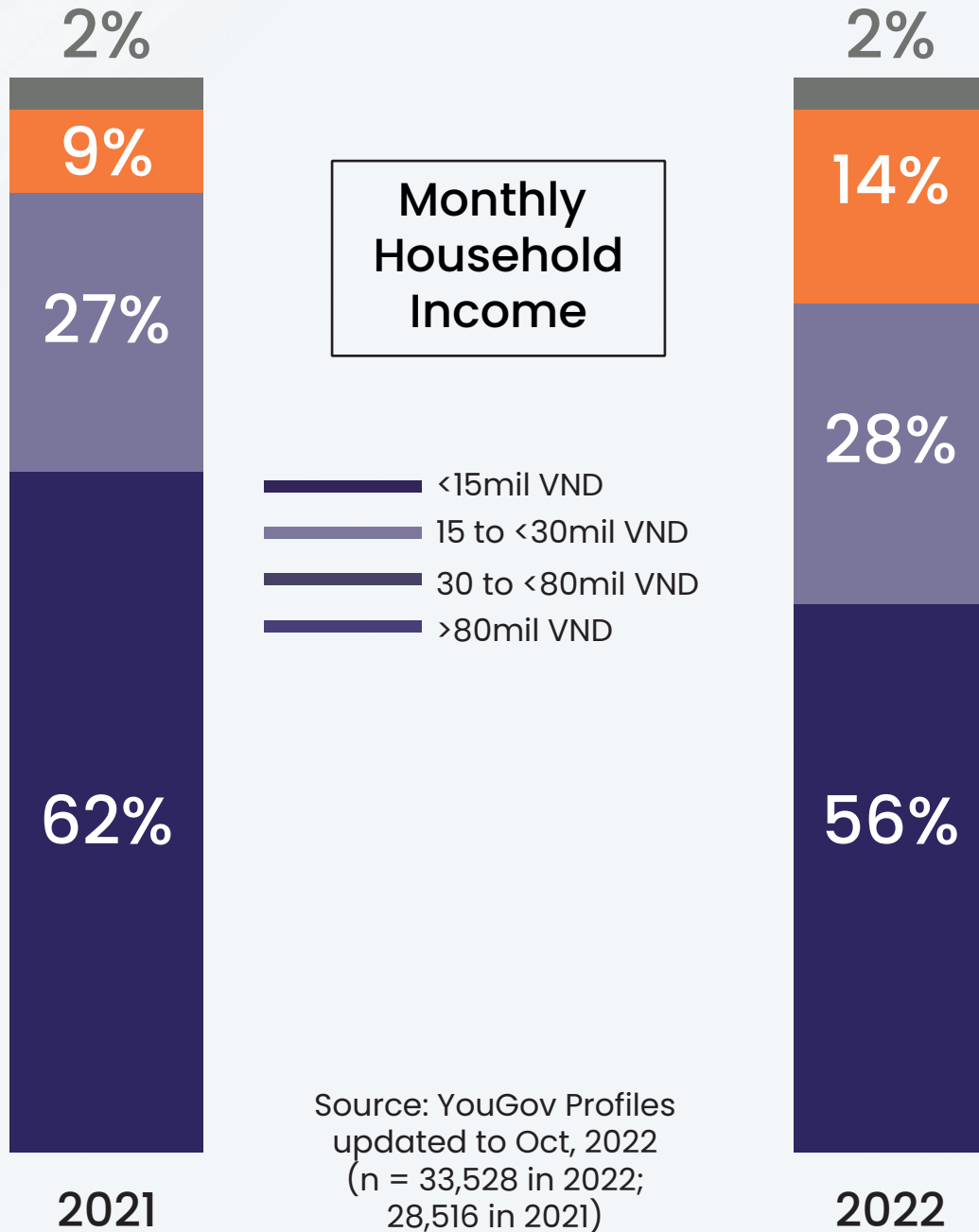


Survey Results



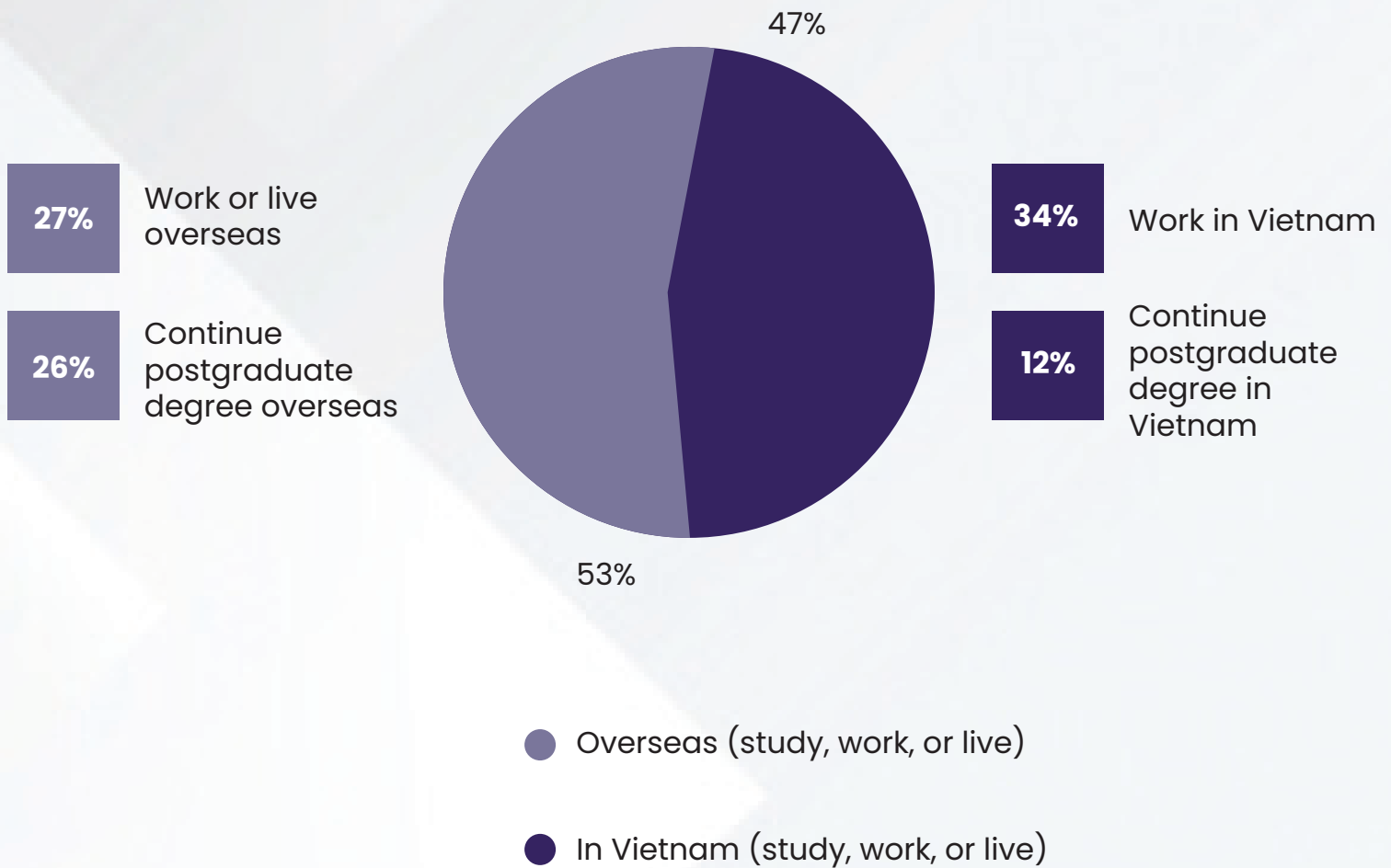
Since 2020, Vietnamese monthly household income continues to grow, which indicates stronger purchasing power.

16% of Vietnamese households now have monthly income of at least VND 30 million VND (US\$1,275).



Source: YouGov Decision Lab survey

Parents' direction for their children's future after graduation: almost half of parents see their children's future opportunity in Vietnam.



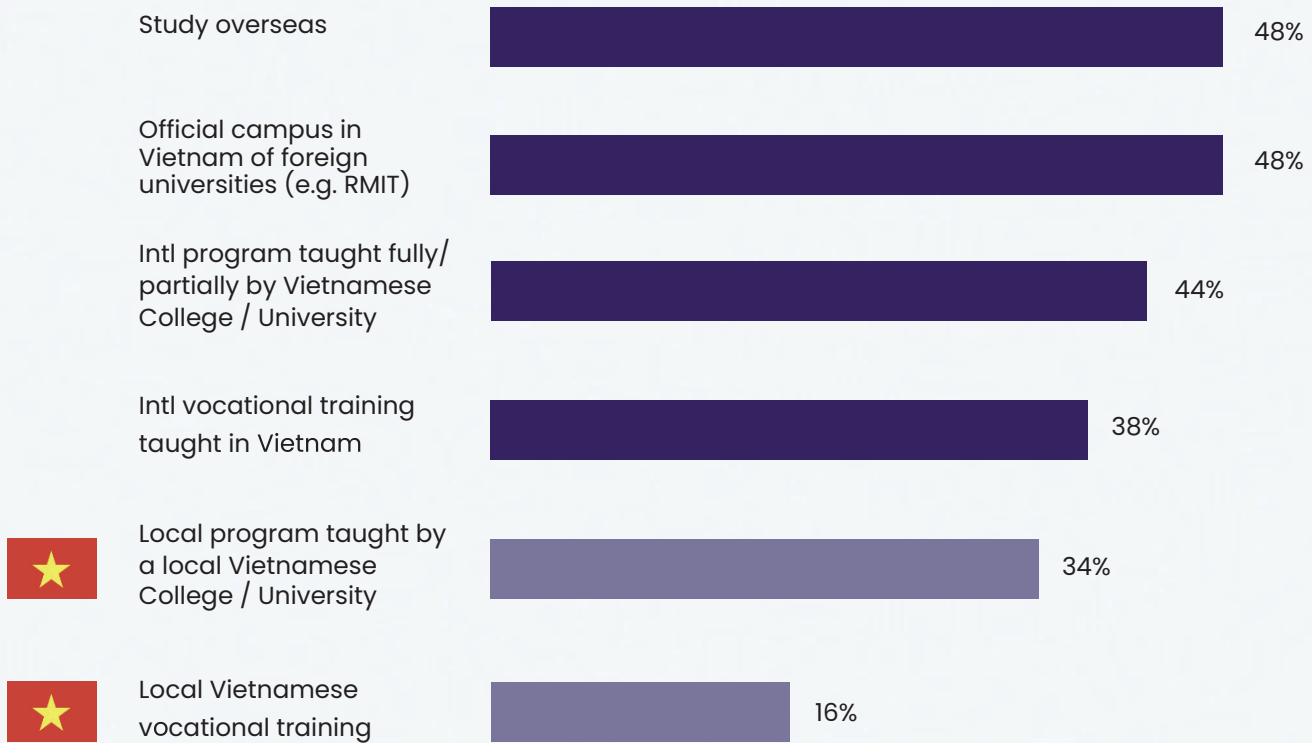
Q: What would be your guidance for your children after they graduate from college / university? (SA)
(n=1005)

Source: YouGov Decision Lab survey


Parents prefer international programs for their children’s higher education, whether taught in Vietnam or overseas.

85% of parents indicated an openness for their children to study TNE programs*.

Preference for higher education programs for children in the future



Q: Which higher education programs are you considering to choose for your children in the future? (MA)
(n=1005)

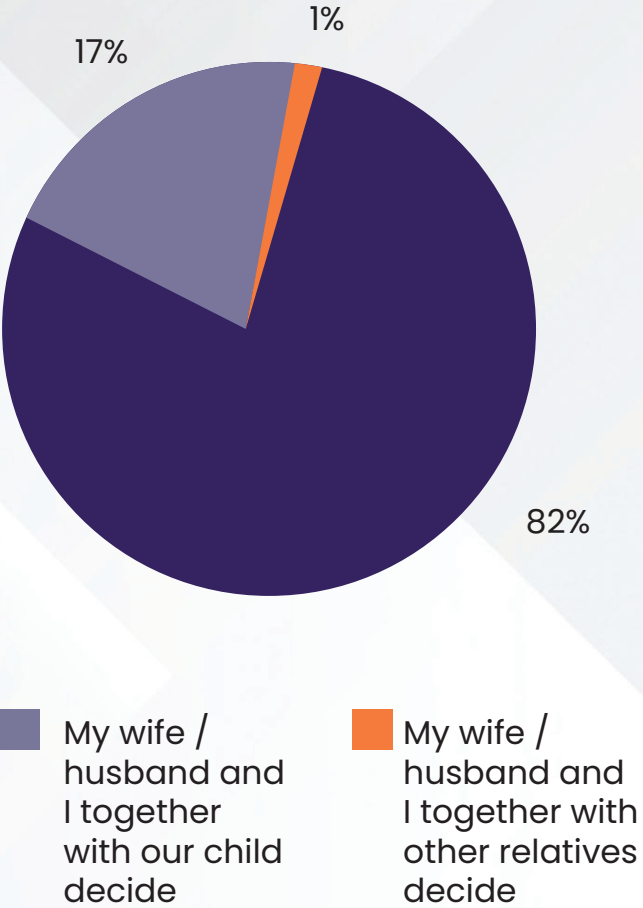
 100% local study (program + location)

Source: YouGov Decision Lab survey

Parents are the key decision maker in choosing the institution for their children’s higher education.

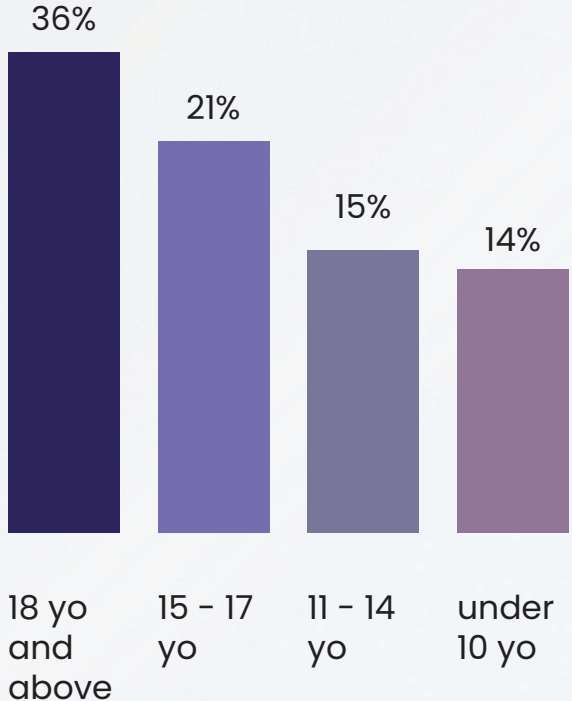
As children get older, they become more involved in choosing their study programs.

Decision maker in choosing higher education institution for children



I and/or my spouse decide

% of children which join their parents in choosing the institution, by age group



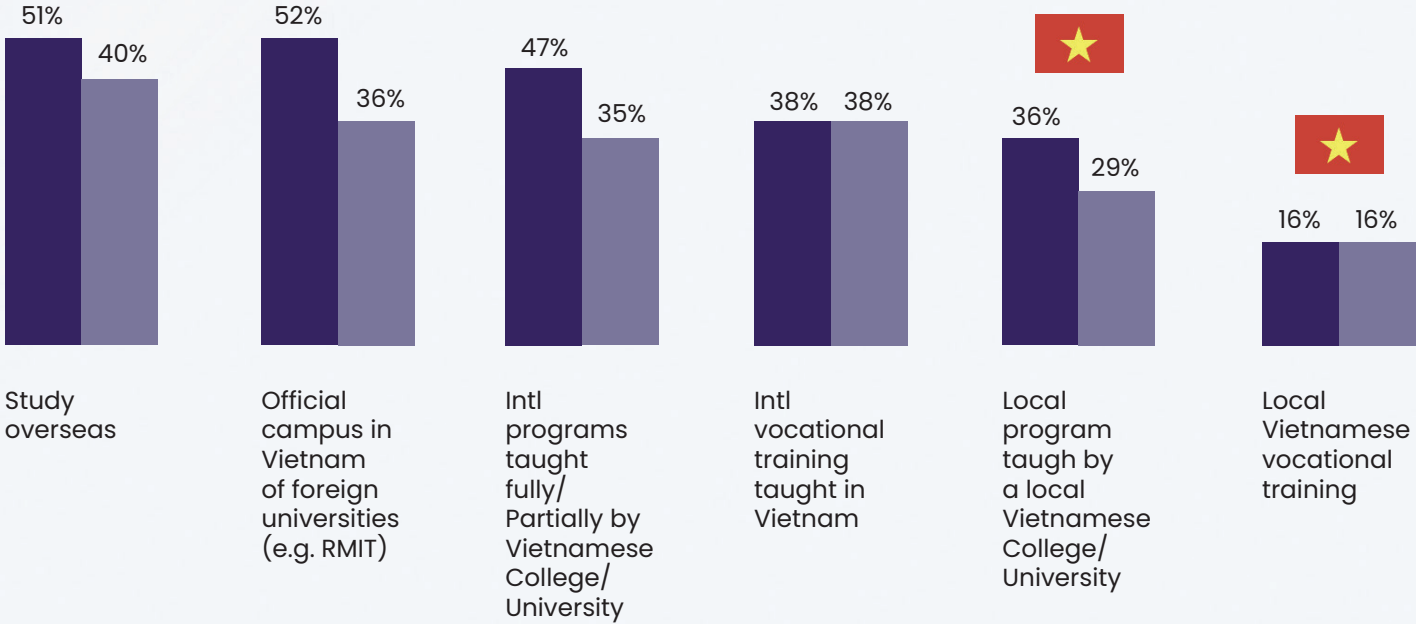
Q: Please select the member involved in the decision-making process of choosing the program for your child’s higher education (SA) (n=1005)

Source: YouGov Decision Lab survey

Consumers in key cities should remain the focus for TNE.

Outside the 6 key cities**, there is a relatively greater demand for vocational training options.

Choices of future education program for children



Source: YouGov Decision Lab survey

- 6 key cities (n=662)
- The rest (n=208)

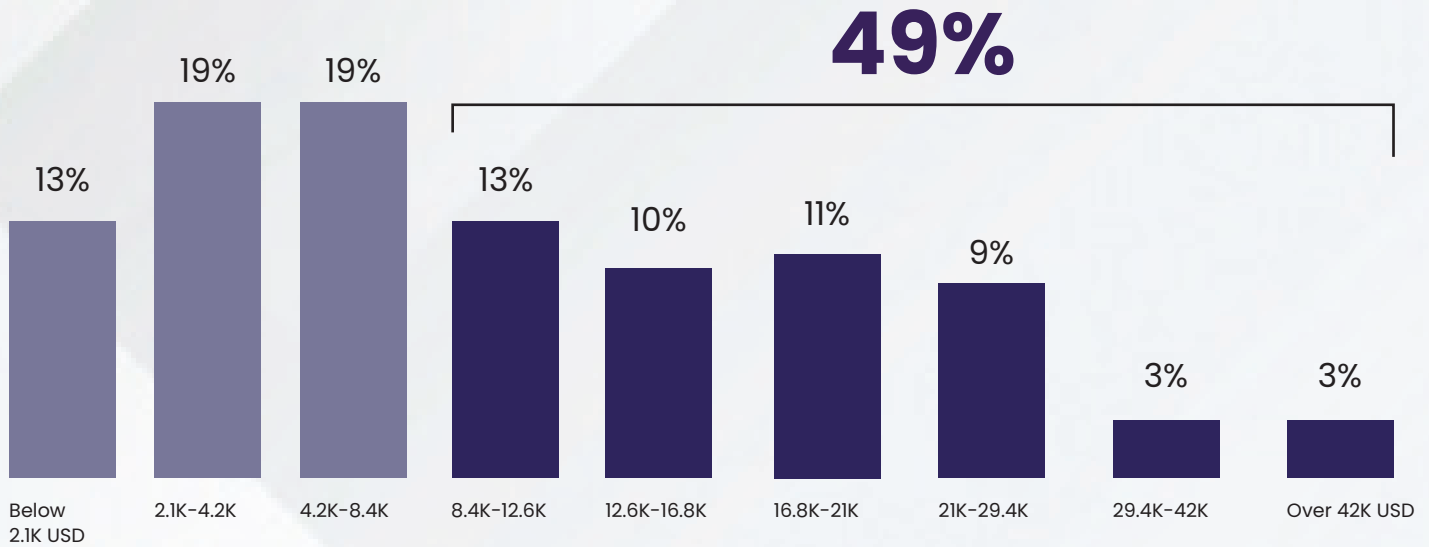


Q: Which programs are you considering to choose for your children in the future? (MA) (n=1005)

** 6 key cities are Hanoi, Ho Chi Minh, Hai Phong, Can Tho, Da Nang, Nha Trang

Half of all parents surveyed are willing to pay at least US\$8,400 per year for an international program taught in Vietnam.

Willingness to pay each year for an international program



67%

Parents are willing to take out loans if actual tuition exceed their ability to pay

5-8K USD

Average tuition fee per year of the current international programs in Vietnam

[For parents intended to choose any of the TNE program types for their children’s higher education]

Q1: With your current income, how much are you able to pay for tuition fee of international programs taught in Vietnam of your child each year? If you have more than 1 child, please specify the average expense for each child. (SA)

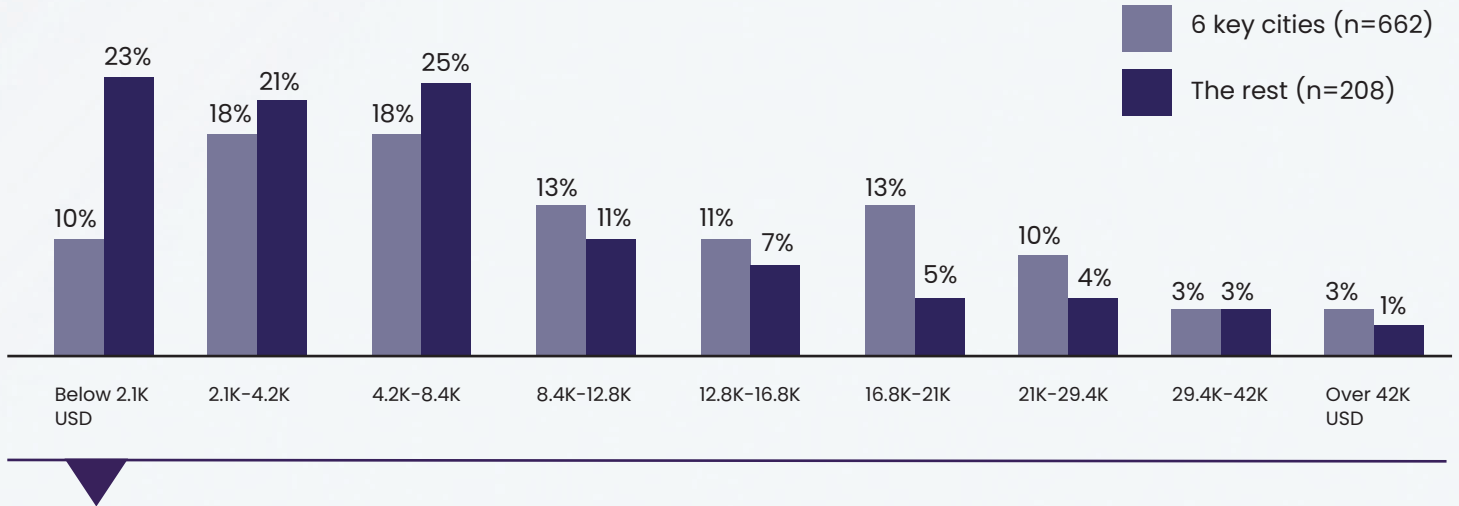
Q2: If the educational expenses are beyond your ability to pay, please indicate the possibility that you will get a loan to pay for your child’s international programs taught in Vietnam. (SA)

Source of tuition fee: Acumen research (n=870)

Source: YouGov Decision Lab survey

Consumers outside key cities are not as willing to pay as much for international programs as those in the 6 key cities.

Willingness to pay each year for an international program



Willing to take out loans if actual tuition exceeds their ability to pay

68% vs. **62%**
 in 6 key cities outside key cities

NOT willing to take out loans if actual tuition exceeds their ability to pay

10% vs. **14%**
 in 6 key cities outside key cities

[For parents intended to choose any of the TNE program types for their children’s higher education]

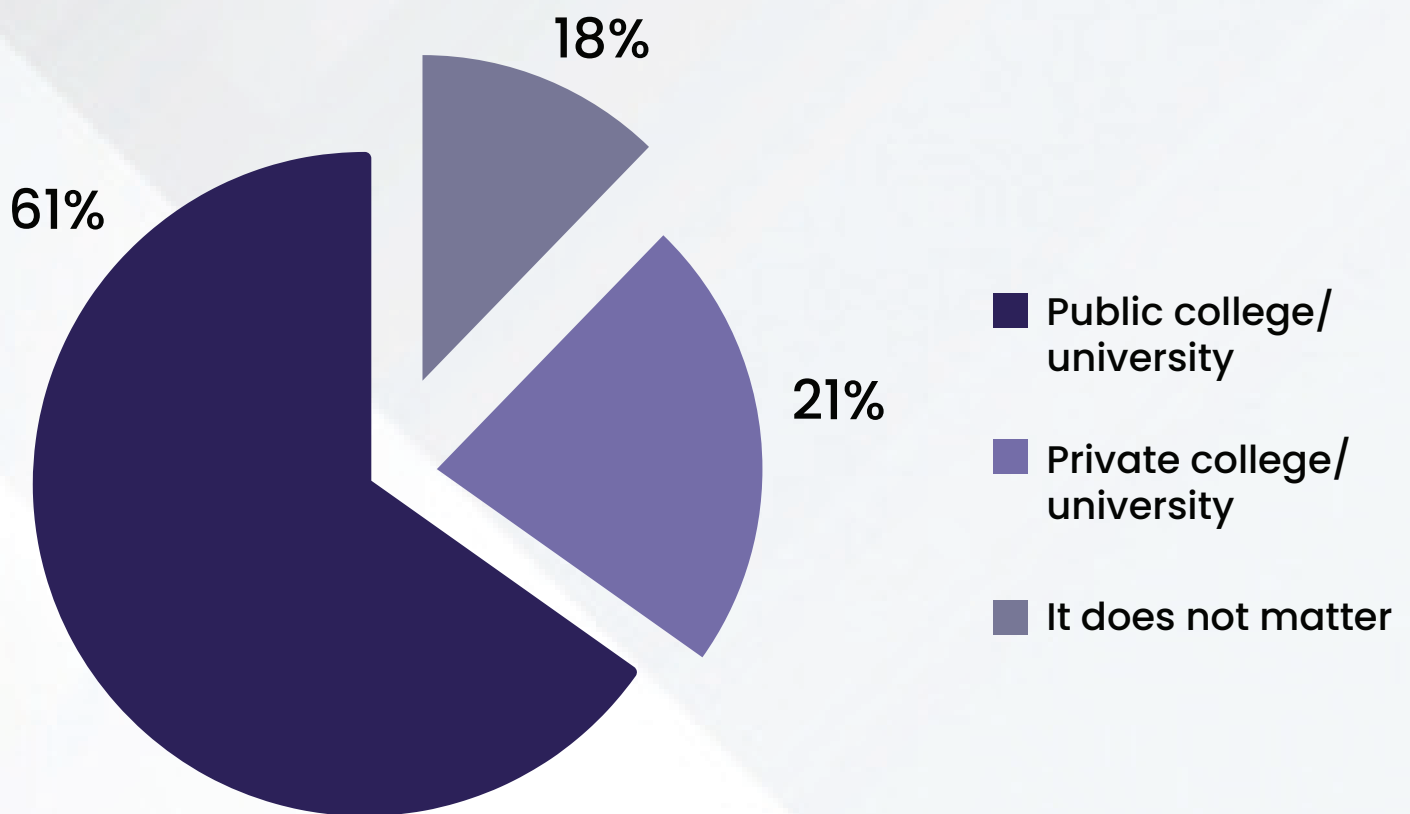
Q1: With your current income, how much are you able to pay for tuition fee of international programs taught in Vietnam of your child each year? If you have more than 1 child, please specify the average expense for each child. (SA)

Q2: If the educational expenses are beyond your ability to pay, please indicate the possibility that you will get a loan to pay for your child’s international programs taught in Vietnam. (SA)

Source: YouGov Decision Lab survey

Parents still prefer public institutions when considering international programs taught in Vietnam. However, 40% parents are open to private institutions or do not have a strong preference between public and private institutions.

Types of college / university considered for international programs



[For parents intended to choose any of the TNE program types for their children's higher education]

Q: Mentioning about international programs, which types of institutions are you considering for your children?

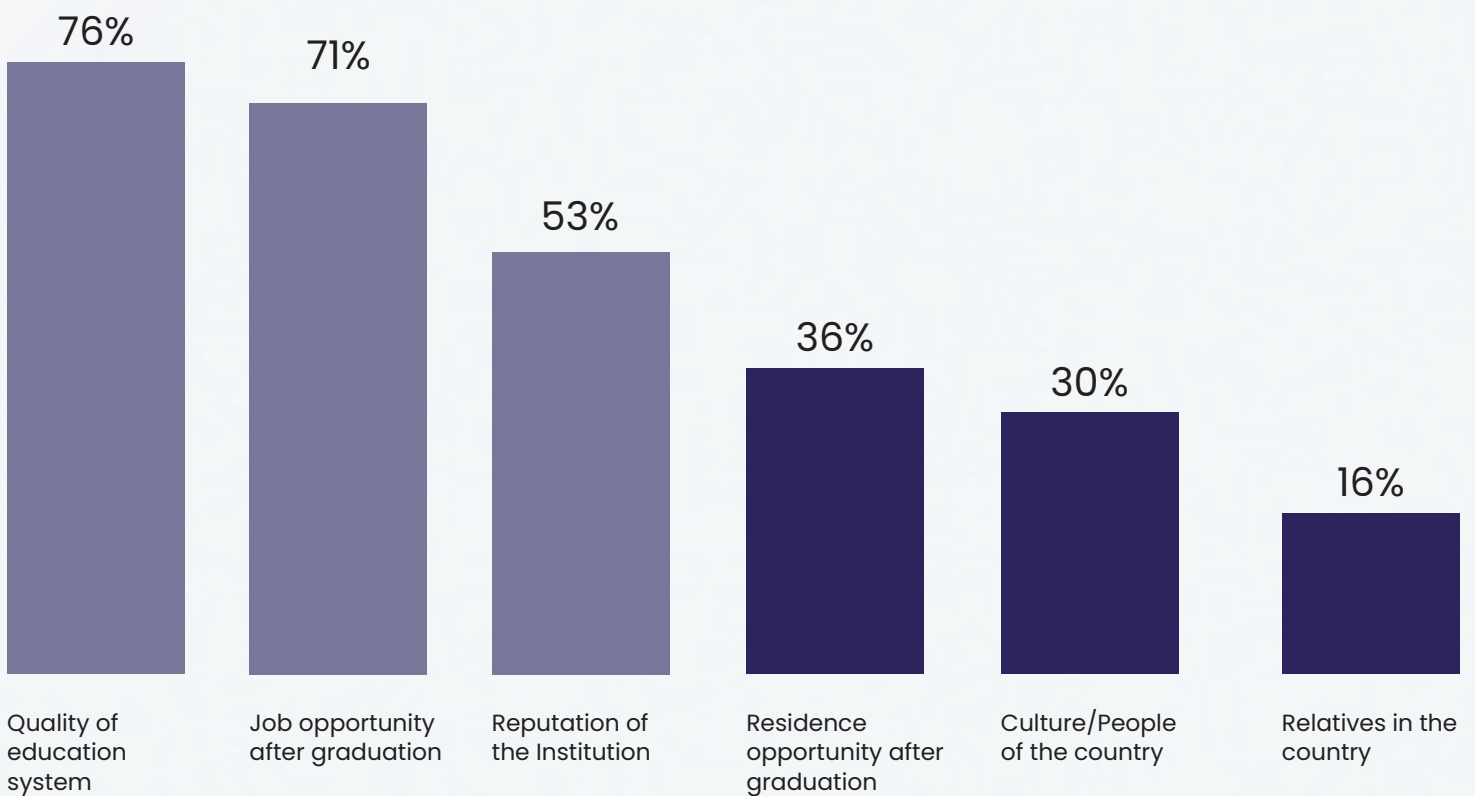
(SA)

(n=652)

Source: YouGov Decision Lab survey

Quality of the education system and job opportunities after graduation come first when choosing the country offering TNE programs.

Top 3 factors in choosing the country providing international programs taught in Vietnam



[For parents intending to choose any of the TNE program types for their children’s higher education]
 Q: Please select up to 3 factors which you consider the most when choosing the country that provides international programs taught in Vietnam (MA)
 (n=870)

Source: YouGov Decision Lab survey

US, UK, and Australia rank at the top in Vietnamese parents' minds for providing the TNE programs.



66%

United States



55%

United Kingdom



55%

Australia



36%

Japan



29%

Canada



21%

New Zealand

Source: YouGov Decision Lab survey

[For parents intended to choose any of the TNE program types for their children's higher education]

Q: Please select up to 3 countries you consider as the top providers of international programs. (MA)
(n=870)

Developing cultural-exchange initiatives and addressing the barriers to TNE in the consultation stage with parents may improve conversion rates.

Barriers to international programs taught in Vietnam

48%

Lack of cultural learning & experience

39%

Ability to find jobs

37%

Recognition / Value of the degree

32%

Domestic education quality

30%

Opportunity of residence overseas

[For parents with no intention to choose TNE program for their children's higher education]

Q: Please indicate 3 main factors that make you not consider international programs taught in Vietnam for your children (MA up to 3 options)

(n=135)

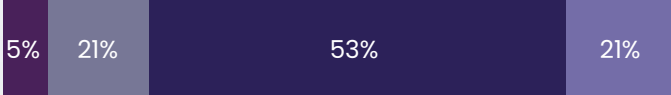
Source: YouGov Decision Lab survey

There is a satisfaction gap between official campus of foreign institutions & international programs taught by Vietnamese institutions, which opens opportunities for new international programs.

Overall satisfaction

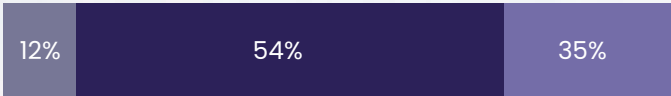
Customer satisfaction score

International programs taught by Vietnamese colleges/universities
(n=19)



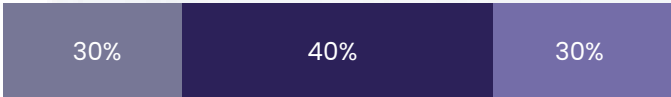
74

Official campus in Vietnam of foreign universities
(n=26)



89

International vocational training taught in Vietnam
(n=10)



70

Extremely dissatisfied Dissatisfied Neutral Satisfied Extremely Satisfied

Customer Satisfaction score = %Very Satisfied + %Satisfied

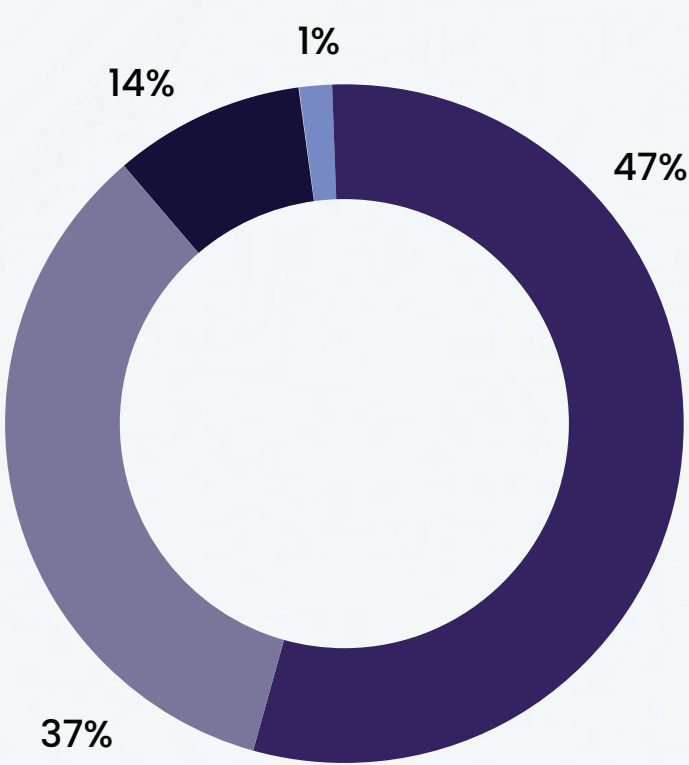
Q: Among parents having kids studying international programs: On the scale of 5, how satisfied are you with the international programs taught in Vietnam that your children are/have been studying.

* Low sample size, for reference use only

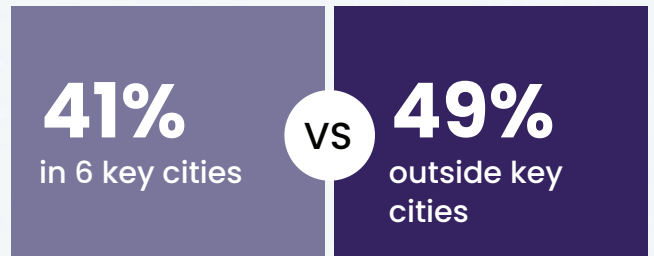
Source: YouGov Decision Lab survey

Right timing: parents start to consider international programs for their children early.

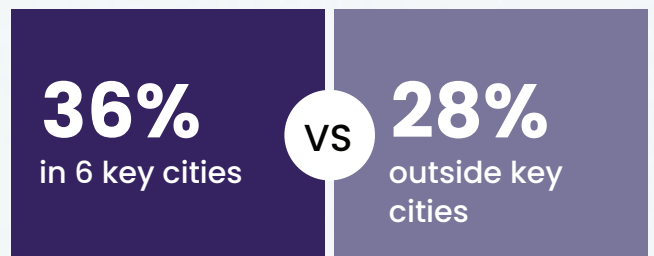
Timing for considering international programs for their children



During child's primary school time



During child's secondary school time



- During university time
- During secondary school time
- During high school time
- During child's primary school time

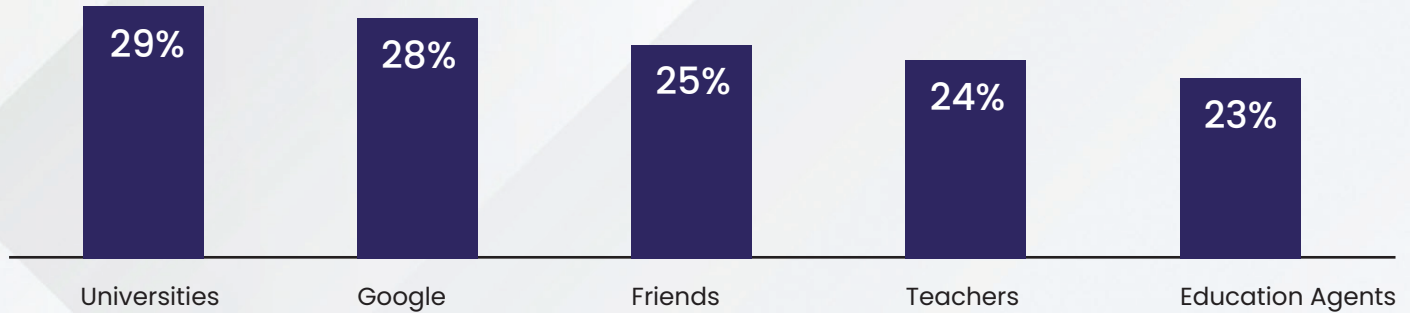
[For parents intended to choose any of the TNE program types for their children's higher education]

Q: When do you start having an idea of choosing an international programs taught in Vietnam for your children?
(n=870)

Source: YouGov Decision Lab survey

Parents choosing TNE know about these programs via official sources, word of mouth & organic search rather than social media exposure.

Top 5 sources from which parents know about TNE



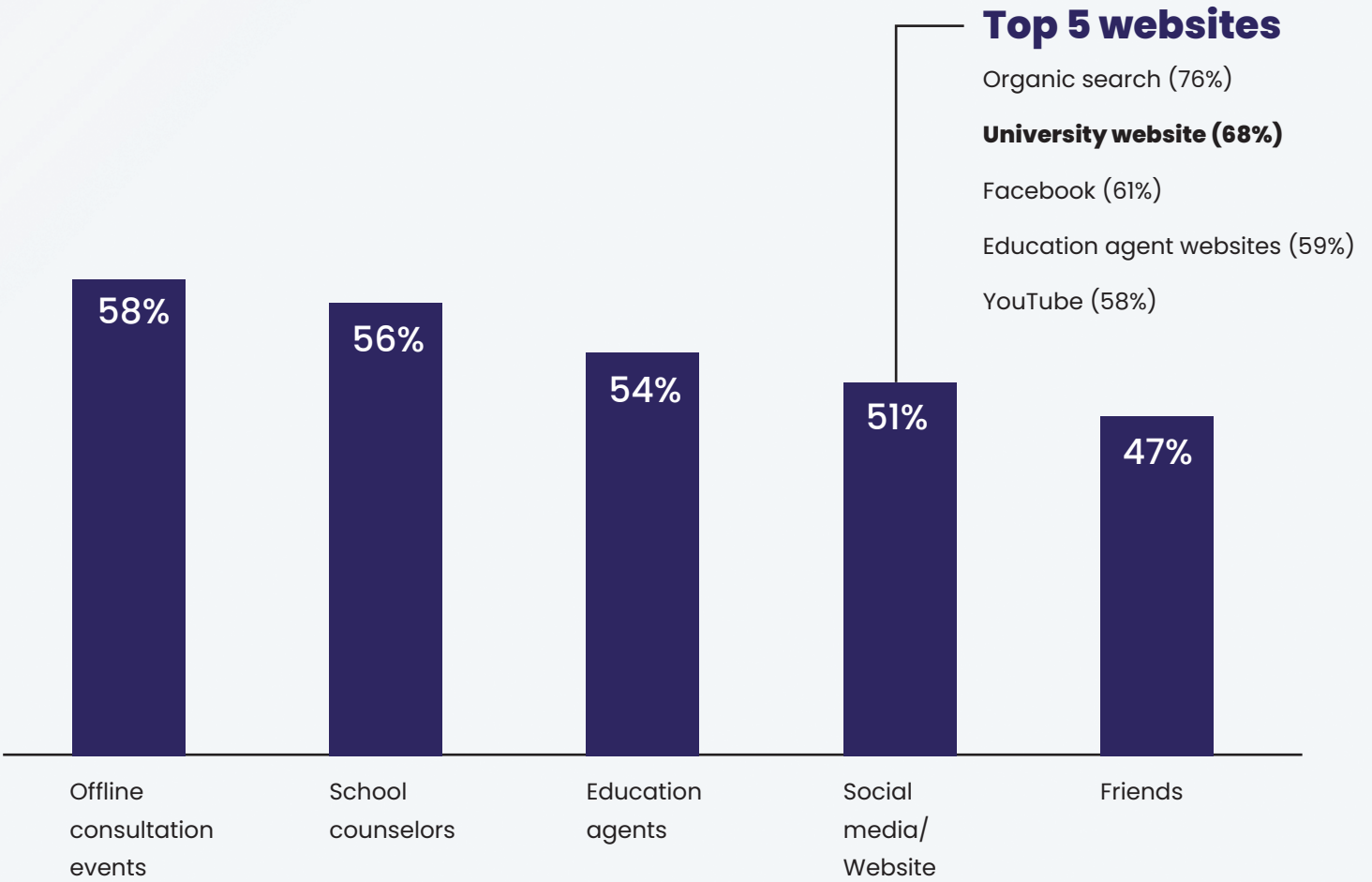
[For parents intended to choose any of the TNE program types for their children's higher education]
Q: From which channel do you know about the international programs taught in Vietnam? (MA)
(n=870)

Source: YouGov Decision Lab survey



Parents then actively search for more information about the program via professional and reliable sources.

Top 5 sources from which parents search for more information about TNE



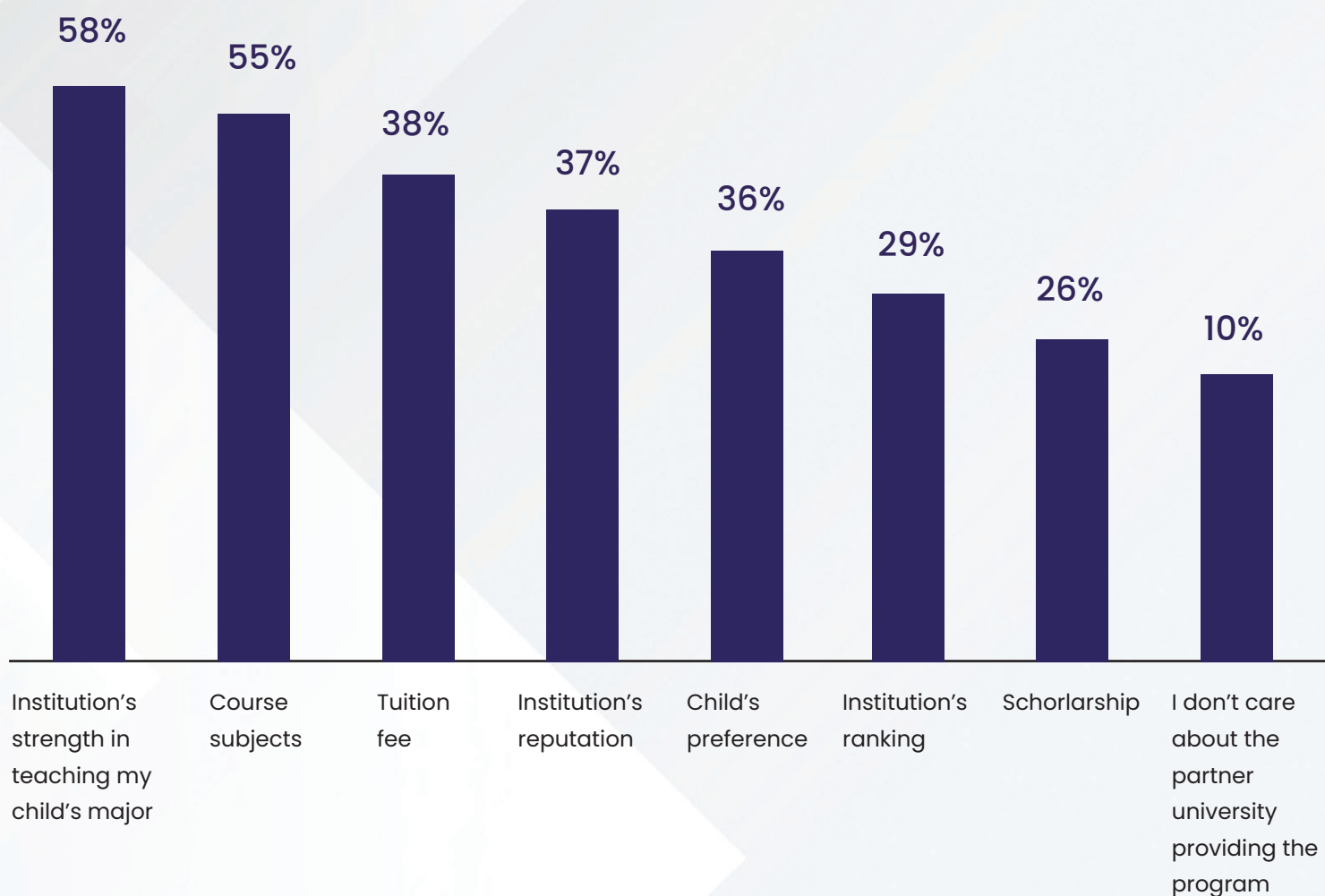
[For parents intended to choose any of the TNE program types for their children’s higher education]

Q1: Which channels do you usually research information about international programs taught in Vietnam on? (MA)

Q2: Which social media/website do you usually research information about international programs taught in Vietnam on? (MA)
(n=870)

Source: YouGov Decision Lab survey

An international institution's strength in a particular subject / major is the most important factor for parents in selecting a TNE program.



[For parents intending to choose any of the TNE program types for their children's higher education]

Q: Please select up to 3 factors which you consider the most when choosing the institution that provides international programs in Vietnam (MA)
(n=223)

Source: YouGov Decision Lab survey

The top sources of information which influence parents' decision making are offline official events and school counsellors.

66% Offline consultation events

54% Family/ spouse

58% School counsellors

51% University website

55% Education agents

50% My kids

[For parents intended to choose any of the TNE program types for their children's higher education]

Q: Among selected channels, please rank top 5 channels that influence your decision for international programs taught in Vietnam the most (1 - Most influential)

(n=870)

Source: YouGov Decision Lab survey



Key Insights

The future is bright for TNE providers in Vietnam, as the middle-class population is rising, there is a clear preference for international programs, and parents are relatively positive about their children's future prospects in Vietnam.

Parents are the primary decision-makers of their children's higher education

There is opportunity for international providers to partner with private institutions to offer TNE programs in Vietnam

The demand and willingness to pay for international programs is greater in the 6 key cities

Official offline channels are the most influential for convincing parents about TNE programs.

The strength of the local and international partner in a given major/subject is a critical decision factor



Conclusion & Recommendations

There is significant interest in TNE in Vietnam. There is an openness to international programs delivered partly or fully in Vietnam from parents, local partners and the government. This market segment looks set to grow in the coming years, catering to the fast-growing middle class.

Based on this report and our own experience, our five key recommendations are:

- ④ **Outcomes:** Be clear about the outcomes you are seeking through TNE engagement in Vietnam. If your primary outcome is commercial, be clear on the delivery model, price point and student volume you will need to deliver that outcome.
- ④ **Partner:** Seek a local partner who also seeks those same outcomes. Alignment of interests between partners is a critical foundation for success.
- ④ **Timeframes:** Be clear on the timeframes by which you measure success. If you are taking a longer (5-10 year) time horizon then looking at emerging cities beyond HCMC and Hanoi is a viable strategy.
- ④ **Engagement with the market:** Target messaging to parents as well as students and seek to engage while the family's children are still some years off university study (e.g from Y7-Y8 onwards)
- ④ **Messages:** Based on our survey, it is important to highlight your strength in given program areas as well as your institutional ranking.



Acumen in Vietnam – Our Services in Vietnam

Borders aren't Boundaries

Explore and expand globally with the most-trusted brand in education internationalisation.

The Acumen team in Vietnam is ready to help. We offer a full suite of services for our international clients in Vietnam, including:

- ▶ **Presence:** Your dedicated in-market presence – a low risk high value solution with strong in-country management and support.
- ▶ **Enrolment services:** We support our clients to manage key points in the admissions funnel, from enquiry management and lead nurture through to conversion.
- ▶ **Research & Consulting:**
 - Market landscape reports to understand the student recruitment market, competitive benchmarking, as well as market strategy development.
 - Vietnam Rising Program: a bespoke program for global university leaders to get a strategic view of Vietnam's education market.
- ▶ **TNE services:** TNE market discovery and partner matching, as well as facilitation and review of partnerships.

About Acumen

From our origins in India to our diverse, global education service across Asia and beyond, our approach has always been to give organisational leaders precisely what they need. Guidance and expertise through their internationalisation journey that they can trust.

Our end-to-end approach empowers universities, educational institutions, and organisations to take their first steps onto the global stage. We're here every step of the way to provide the recommendations and resources needed to achieve positive results.

Since our story began in 2008 under the Sannam S4 Group umbrella, Acumen, the most-trusted name in the education sector, is focussed on providing valuable market insight, guidance, and internationalisation to our clients. Our unique understanding, people-first approach and student-focussed insights have made us an invaluable partner for education institutions and organisations in every corner of the globe.

We take the globalisation of education institutions and organisations to the next level, never losing sight of what's important. Our people and partners.

Speak with our team



Australia@Acumen.education



UK@Acumen.education



USA@Acumen.education



SEA@Acumen.education



www.acumen.education

Disclaimer and copyright

Published in January 2023. This publication is subject to copyright. Reasonable use (including quoting) of the findings or other material in this publication is permitted, subject to appropriate attribution to Acumen. However, this publication may not be redistributed, or republished in part or in full without explicit consent from Acumen.

This publication has been prepared by Acumen for general guidance on matters of interest only and does not constitute professional advice.

No representation or warranty (express or implied) is given as to the accuracy or completeness of the information contained in this publication, and Acumen does not accept or assume any liability, responsibility, or duty of care for any consequences of a third party acting, or refraining to act, in reliance on the information contained in this publication or for any decision based on it.



www.acumen.education

