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**VIETNAM KINDERGARTEN EDUCATION INDUSTRY RESEARCH
AND TOUHULA'S POSSIBILITY OF EXPANDING TO & DEVELOP-
ING IN VIETNAM**

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Vietnam Kindergarten Education Industry Research and Touhula's Possibility of Expanding to & Developing in Vietnam

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Abstract

The project's aim is to investigate the kindergarten industry in the Vietnamese market to discover the possibility of Touhula expanding to and developing in this market. The research will support the company in understanding the kindergarten industry in Vietnam and see whether the company differentiates itself from currently available resources on the market.

The research implementation was conducted in a combination of both primary and secondary research. Primary data was attained from quantitative research by sending out a questionnaire to target buyers (parents and future parents of children at the nursery and kindergarten ages) in Vietnam, and to be more precise, mainly in Hanoi and Hai-phong. Meanwhile, secondary data was selected from related studies online.

The report has answered the question proposed at the beginning of the project, which is "Is Vietnam a potential market for Touhula to expand to and develop in?". With the results, Touhula will gain a clearer view of the preschool education industry in the Vietnamese market in order to make a decision on whether this market matches the company's expectations. Information regarding the market opportunities and challenges are shown with the suggestion that building a marketing plan is the first essential step to enter the market. In the final parts, the author also gives recommendations on penetration strategies and the matters that Touhula should take into consideration when entering the market.

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Market research, Vietnam, Export service, Kindergarten industry, Finnish education, preschool education

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1 INTRODUCTION

1.1 Company and project background

Touhula is a private Finnish organization that operates in the preschool education industry. It is the largest private day care company in Finland with more than 170 day care centers, over 9,000 children and 2,500 employees (Touhula 2019). The company's commitment is to provide quality, versatile and stimulating education in a joyful, safe and inspiring environment. The company organizes the day care centers according to four different themes: language, exercise, adventure and art, and culture. Its mission statement is: "Together with parents, we raise and educate today's small children into great individuals of tomorrow". Its operational goal is: "We are the most wanted early childhood educator in Finland and the rest of the world will learn from. Together, we are the best in the world - from the start". (Touhula 2019.)

Touhula's core value and philosophy are active (to put heart into work and to accomplish great things) and enthusiastic (to set measurable targets for everything they do), open-minded (to be ambitious and continuously develop the operations) and responsible (to treat everyone with equal respect: the children, the families, and each other), and are always the best for the families (the educational approach is rooted in caring and genuine encounters with children and parents). Touhula regularly measures its customer satisfaction and develops its operations based on the feedback received. In a customer satisfaction survey conducted in spring 2018, Touhula's satisfaction score is 4.32 on a scale of 1-5 and in the survey carried out in autumn 2017, it was 4.38. (Touhula 2019.)

Finnish education is globally well-known to be one of the tops in the world; Vietnam is no exception in its awareness of this. A lot of students have decided to choose Finland as a foreign study option for their Bachelor's or Master's degrees. Taking advantage of this, in order to check whether Vietnam is a potential market, a market research was carried out as the first essential step of expanding to understand the market. This paper will report on the preschool education industry and Touhula's possibility of developing in Vietnam. There has already been a Finnish preschool and a K-12 school implemented in Ho Chi Minh City (Persson 2017).

1.2 Thesis objectives, research questions and limitations

The objectives of the research are to see whether Vietnam is a suitable market for Touhula and the possibilities for Touhula to develop in this country.

A research question has been generated at the beginning in order to investigate the pre-school education industry in Vietnam and Touhula's potentiality: "Is Vietnam a potential market for Touhula to expand to and develop in?" Sub questions are then divided into different aspects in order to address the answers to the main question.

What is the kindergarten industry in Vietnam like?

The answer to this question has been explained and explored in the fifth part, "Kindergarten industry market research in Vietnam".

What are the value propositions that Touhula have?

To answer this question, a general picture of Touhula is given in the third part "Introduction to case company - Touhula"

Is there any willingness among consumers to have their children going to Touhula's schools?

To answer this question, a questionnaire was given to parents and future parents of children at the age of nursery and preschool. More information on this answer can be found in the sixth part, "Survey Results", of this report.

Does the business have sufficient resources to implement the plan?

The issue related to this question is given in the seventh part "Matters to take into consideration for Touhula" as well as the eighth part "Market penetration strategies recommendations".

1.3 Methodology and data collection

The research on the Vietnamese market was done mostly with secondary research from available sources and educational paper work online. In addition, primary research with quantitative data in the form of questionnaire was carried out with potential target customers who are parents having or about to have kids aged 0 - 6. Some people of married ages but who had not yet married also took part in answering the questionnaire. The results of the questionnaire were used to check the demand in the target country and Touhula's possibilities.

The survey was carried out in Vietnamese language as it is the native language of the country. In addition, using the native language helps the target audiences to have a clear understanding regarding the ideas and content of the questions and conveyer messages. The questionnaire was made mainly in the form of paper and divided across some groups in order to ensure the high percentage of return rate when comparing to the one made and divided through online platforms. However, the questionnaire was also made in a digital form. In this case, Google Forms was also used to send to a more active and willing group. Google Forms is an online platform that supports users to create free and personal online surveys. The survey was sent to a group of audiences by sending the shared link through Facebook Messenger, which is a commonly used social platform in Vietnam, for a fast and easy communication between audiences and author. Google Forms tracks answers automatically from participants. Therefore, after collecting the hard copy questionnaire answers, the author also put these data into Google Forms in order to track the results. The results were either analyzed with Google response summary or with Microsoft Excel.

In part 8.3 of this paper, the recommended location for the market entrance is Hanoi city. Therefore, the chosen market for carrying out the survey is Hanoi. In addition, the neighbor and also the third largest city in Vietnam, Haiphong, was chosen to be another market for carrying the survey. Haiphong was the ninth city in regards to number of pupils at nursery and kindergarten age (General Statistics Office of Vietnam 2017). Another reason for choosing Haiphong City is the support the author received to reach survey participant groups.

The target groups taking part in the survey were from four sources: a public company in Hanoi, a private company in Haiphong, a private kindergarten in Haiphong and a group

of people working in different private companies in Hanoi. For the first three groups, the author asked for assistance in distributing the questionnaire and collecting the hard-copy answers, while for the fourth group, the author sent the survey link directly to them and asked them to share the digital link with their friends if possible.

The questionnaire includes fifteen questions and three pages. The survey content contains two parts. While the first part concentrates on collecting the target group's information and behaviors, the second describes the company in general and identifies respondents' interests in the company. The questionnaire is located in the appendices. (Appendix 1 & Appendix 2.)

1.4 Outline of the report

The report will first introduce preschool education, Touhula Company and its model. Then, a theoretical framework is described as background theories for the report. After that, the report will have a deep investigation of the kindergarten industry in the Vietnamese market followed by the survey results to see the possibilities for Touhula in the market. The author also lists the factors that Touhula should take into consideration when exporting. In addition, there are suggestions on the possible cities market and partners, as well as the ways that the company can promote the new preschool model. This will come finally with a conclusion on whether Vietnam is a potential market for Touhula to enter.

2 PRESCHOOL EDUCATION IN FINLAND

In 2012, the Economist Intelligence Unit, commissioned by Lien Foundation, did a report on benchmarking early education across the world. The report ranked preschool provision of 45 countries from OECD (Organization for Economic Cooperation and Development) and major emerging markets. Specifically, the early childhood education (ECE) for children from three to six years old was assessed on three main categories: availability, affordability and quality of the preschool environment (social context category accounted a small percentage).

The country with the highest overall score (scale is from 1 -100) when combining four categorical points was Finland with 91.8 points, followed by Sweden with 91.7 points and Norway with 88.9 points. These three Nordic countries dominated the rankings in performing well at preschool provision. Other countries well-known among Vietnamese as countries of having great education in the world, had the following positions: UK – 4th (87.9), South Korea – 10th (72.5), Germany – 11th (71.9), Japan – 21st (63.5), USA – 24th (60.3), Canada – 26th (59.9), Australia – 28th (59.1) and Singapore – 29th (58.8).

Finland staying in the overall first position was due to a number of reasons. First, the preschool system has been developed since the 1960s in order to support the participation of women at work. Secondly, the government supports the rights of children to have access to local preschools, childcare as well as comprehensive healthcare. Third, teaching has been developed as a professional career with teachers pursuing high university qualification, while many complete a master's degree. Fourth, a teacher is considered as a highly respected professional in their society, similar to lawyer or doctor, and teachers receive good wages. Fifth, the class ratios were relative low of 11 children per teacher in order to reduce the stress level of the teacher and to ensure all children receive an adequate amount of concentration, education and care. Last but not least in importance, the teaching curriculum was well-defined together with health and safety standards. The long-term, sustained investments and concentration on early childhood development has been embedded in Finnish society and therefore supported to deliver a good overall performance of early childhood education and care (ECEC) to children. (Economist Intelligence Unit 2012.)

Looking separately at three main categories, Finland ranked fifth in availability and fourth in affordability while having the first position in quality. In the case of exporting Finnish education to a new market such as Vietnam, quality would be looked at to compare to existing countries' models in Vietnam market. It should be noted that quality, in this case, does not relate to specific pedagogical guidelines or to judge which is best. It was associated with the following indicators: student-teacher ratio in class, average teacher wages, curriculum guidelines, teacher training, health and safety guidelines, data collection mechanism, linkages between preschool and primary school, parental involvement and education programs. Finland was in the first position of 93.5 points. Well-known countries among the Vietnamese scored as follows: UK – 3rd (86.9), South Korea – 10th (69.0), Japan – 13th (67.7), Germany – 17th (62.4), USA – 22nd (57.8), Australia – 24th (56.4), Canada – 26th (54.5) and Singapore – 30th (50.6). Vietnam had an overall position of 41st with the score of 31.3 points, while the quality score was 26.8 and stayed in the 42nd position. (Economist Intelligence Unit 2012.)

3 INTRODUCTION TO CASE COMPANY – TOUHULA

3.1 Touhula's preschool model – concept & service

Touhula organizes daycare centers according to four different and specific themes including exercise daycare centers, language daycare centers, adventure daycare centers, and arts and culture daycare centers. Exercise daycare centers focus on exercise, which is included in all areas of children's learning, while the children will enjoy the active and healthy lifestyle. Language daycare centers support especially verbally gifted kids with the rich world of languages through various ways from interaction support activities, songs, rhymes, stories and games as well as dual language immersion, which will also be introduced here. Adventure daycare centers inspire kids to discover the world in all shapes and sizes without limitation and fear with the support statement that every child is a treasure. Arts and culture daycare centers inspire children in a cultural and artistically rich environment so that they can express themselves with creative souls. (Touhula operational approach 2018.)

What Touhula wants is to support children to have self-esteem, to respect life, to be playful, sporty and creative, to be happy and positive, and to have good cooperative skills (Touhula 2019). Touhula daycare centers follow the municipal early childhood education principals and plans while having their own individual annual action plan. Touhula focuses on quality standards; therefore, the organization only recruits trained, professional employees for permanent positions. Daycare centers also regularly measure the satisfactory of parents and continuously improve the operations based on the feedback received. (Touhula frequently asked questions 2019.)

Touhula daycare fees are based on daily time in daycare, value of the services at the local places as well as parents' income and family size. Touhula's philosophy considers that daycare fees should not be an obstacle for families to have their kids study at Touhula (Touhula frequently asked questions 2019). In Joensuu, the tuition fee range is 0 - 290 euros (EUR) per child. (Sirpa 2018.)

Touhula also values the parents' cooperation in planning and preparing the child's individual early childhood education and care (ECEC) plan. This plan will be discussed twice a year with the parents for improvement. In addition to this, there will be daily chats between parents and employees, which is considered as a supportive habit. (Touhula frequently asked questions 2019.)

3.2 Vision and principles

At Touhula, children get their equal share of love and limits, exercise and rest, a lot of new things and familiar things as well – all of this in just the right proportion (Touhula 2019). Within their operations, Touhula commits to be socially, ecologically and economically sustainable and responsible. Their important principles for sustainable developments are: safety and health come first, environmental education is part of every daycare center's pedagogies, human rights, diversity and equality are respected in all activities, natural resources are used responsibly, and partners are selected with sustainability commitment. (Touhula vastuullisuus 2019.)

Touhula believes consistency can create better cooperation among children, parents and employees. Every daycare center shares the same practices as well as policies that put children's interests at heart. They organize children into small groups to create better interactions between teachers and children and between children and their close friends. Touhula daycare centers work closely with parents to plan individual ECEC for children. In addition, there is also open interaction with parents including daily chats, meetings and events. Communication between daycare centers and parents can also be performed through electronic channels. (Touhula daycare info 2019.)

3.3 The team

As mentioned in Touhula's concept and service part, Touhula only recruits trained, professional employees for permanent positions. Therefore, it can be seen that the team commits to deliver a qualified and professional services. Touhula's philosophy and principles also show that the staff puts the kids at the heart of their activities. Furthermore, responsibility plays an important role in their work and tasks.

4 THEORITICAL FRAMEWORK

4.1 Education export as a service

According to Philip Kotler and Gary Armstrong in the book *Principles of Marketing* (2010), four service's characteristics are intangibility, variability, inseparability and perishability, which differentiate a service from a product / a good.

Even though education seems to include both tangible assets (equipment, facilities, etc.) and intangible assets (experiences, teaching methods, etc.), according to Kotler and Keller (2009), the core service of the education of educational institutions is about giving instructions and relating services such as caring, educating, tutoring, dining, etc. Therefore, it can be concluded that education export is a type of service export.

4.2 International market research

a. Definition

Globalization has made it easier than before to bring a business to international level. International market research is a process of collecting and analyzing the information of the targeting countries in order to make decisions. Understanding the foreign market and customers as well as its competitive environments and industries, the company will gain insights at the opportunities, challenges and be able to find a proper strategy on implementation at the targeting market. Because of international market research's importance, Watters (2015) stated, "To enter an international market, even a familiar one, without conducting market research increases the risk of misunderstanding and miscalculating the financial opportunity."

b. Process

Bock (n.d.) suggested that the market research process includes five steps: formulating a research question, designing a research methodology, data collection, analysis and communicating of the findings. Formulating the research questions means brain-storming the

key problem questions to be answered by the market research. Then, by designing a methodology, a plan for answering the questions is created. At this stage, primary or secondary research will be chosen. After that, the researchers will start collect the data based on methodology. The data collected will be analyzed in accordance with the questions. Finally, the last step of reporting the findings will be carried out.

Kepner (2012) illustrated a process of six steps: define the research problem and establish objectives, determine the sources of information to fulfill the research objectives, consider the costs and benefits of the research, gather the relevant data from secondary or primary sources or both, analyze interpret, and summarize the results and finally, effectively communicate the results to decision makers. Kepner's process is quite similar to Bock's. The only step that was added is the third step, where he suggested considering the costs and benefits of the research as well.

Applying to this thesis, the author has followed five steps suggested by Bock when performing the market research. The author formed the research questions in Section 1.2 and described the research methodology in Section 1.3. The data collection and analyzing phases were carried out in later parts of the thesis. The findings will be reported by this thesis written together with a presentation.

c. Limitation

Young and Javalgi (2007) stated a number of challenges that a researcher has to face with when conducting international marketing research. These include cultural differences (language, translation, syntax, cultural norms, time zones and foreign holidays), sampling issues (native interviewers, questionnaire length and incentives), measurement issues, market research infrastructure (currency fluctuations), data collection challenges and legal issues. Even though these are challenges of international marketing research, international market research faces the same issues.

In terms of the thesis, the author received a number of survey answers. However, a few of these were answered in unqualified forms. The participants did not answer all the question as required since most of them were carried out in the form of paper. Some did not properly read the question before answering. This led to inadequate answers. The sampling group that the author was able to carry out the survey with was mostly done through

personal network; therefore, it is limited. Performing surveys in companies and pre-schools, without previous connection, is considered to be impolite and not a norm in Vietnamese culture. In addition, the research findings were based on the sampling and could not represent the whole target population.

4.3 Market entry modes

4.3.1 Modes of entry

Different discussions on modes of entry lead to different names and types of entry modes. Some people list the most common types of entry modes, while others combine entry modes into bigger groups. Krzysztof Wach (2014), in his book *Market Entry Modes for International Businesses*, Chapter 7, has defined the three main market entry mode groups of exporting modes, contractual modes and investment modes. The exporting modes include cooperative export, direct and indirect export. The contractual modes include management contracts, turn-key operations, subcontracting, licensing and franchising. Investment modes include branches, joint venture subsidiaries and wholly-owned subsidiaries. In this part, the author will list only the most common market entry modes: exporting, ownership, Greenfield investment (also call Greenfield Venture), franchising, licensing and joint venture.

a. Exporting

Exporting is the most common way to enter a new market. While maintaining the business in the home market, the company sends goods to a foreign market. Exporting can be done in different forms of indirect exporting, direct exporting and cooperative exporting. While indirect exporting requires a domestic intermediary, direct exporting has the company connected to the foreign market itself by connecting to a foreign intermediary, setting up a representative office or having a foreign distribution network. Cooperative exporting is the type of export that is formed by at least two companies, which support the access advantages of each other in the foreign market (Krzysztof & Wach 2014). In general, exporting mode has a low cost of implementation and low risk compared to other entry

forms. Testing goods samples in the market and performing adjustments to the goods are possible with this mode type. (BIDC 2017.)

b. Greenfield Venture

A Greenfield Venture is a type of ownership where a company invests fund directly into the foreign country and builds its business from ground up. The advantage of this mode is that it brings a full control in the long term for the company as well as stimulating economic activities. Due to the economic support, the government might offer tax breaks and other incentives (BIDC 2017). However, Greenfield Investment also involves risks in terms of relationship with the host country, hidden issues and costs, which lead to time consuming and costs unpredictability.

c. Acquisitions

By purchasing a foreign firm's stock, the company gains control over the foreign firm. This is called acquisition. This mode gives the company a quick establishment in a new market with a great control level. If the two firms operate in the same industry, a customer base might be already there. Nevertheless, the company has to make a big investments over the foreign firm. (Saylor Academy 2012.)

d. Licensing

Licensing is when the company uses agreements or licenses to give the foreign company the right to use a product, process, patent, brand, and so on in an exchange for a fixed payment. Despite the fact that this mode saves time and finances when expanding to a new market, the company needs to spend time and efforts on monitoring, training, and renewals of various papers and documents. (BIDC 2017.)

e. Franchising

Franchising works well for repeatable business model companies with a strong brand. The difference of this mode comparing to licensing is that the company requires to be more involved with the foreign franchise in terms of development and marketing. In order to build a unique and synchronized brand name with the same quality image, controlling efforts need to be performed. (BIDC 2017.)

f. Joint venture

A joint venture is the entry mode in which the company and the foreign firm agree to cooperate in the foreign market. Usually, a third independently-managed firm will be created under control of both parties. The advantages are that the new firm will be built from the competences combination, and the risks are divided among two firms. Nevertheless, conflicts of interest between partners may occur. (BIDC 2017.)

4.3.2 Factors affecting selection of Market entry modes (MEMs)

As can be seen from above, there are different types of market entry modes. For a company to choose the most suitable type to enter the market, what factors affect their decisions? The following part will explain these factors.

The factors affecting MEMs are divided into two main groups of internal and external factors. While the first one focuses on factors from inside the organization itself, these factors includes the resources, goals, strengths, weaknesses and limitations, and so on; the second one identifies the factors from outside the organization (mainly from the foreign market) that affect the entry mode decision of the company. There are also some mixed factors introduced in Koch's model.

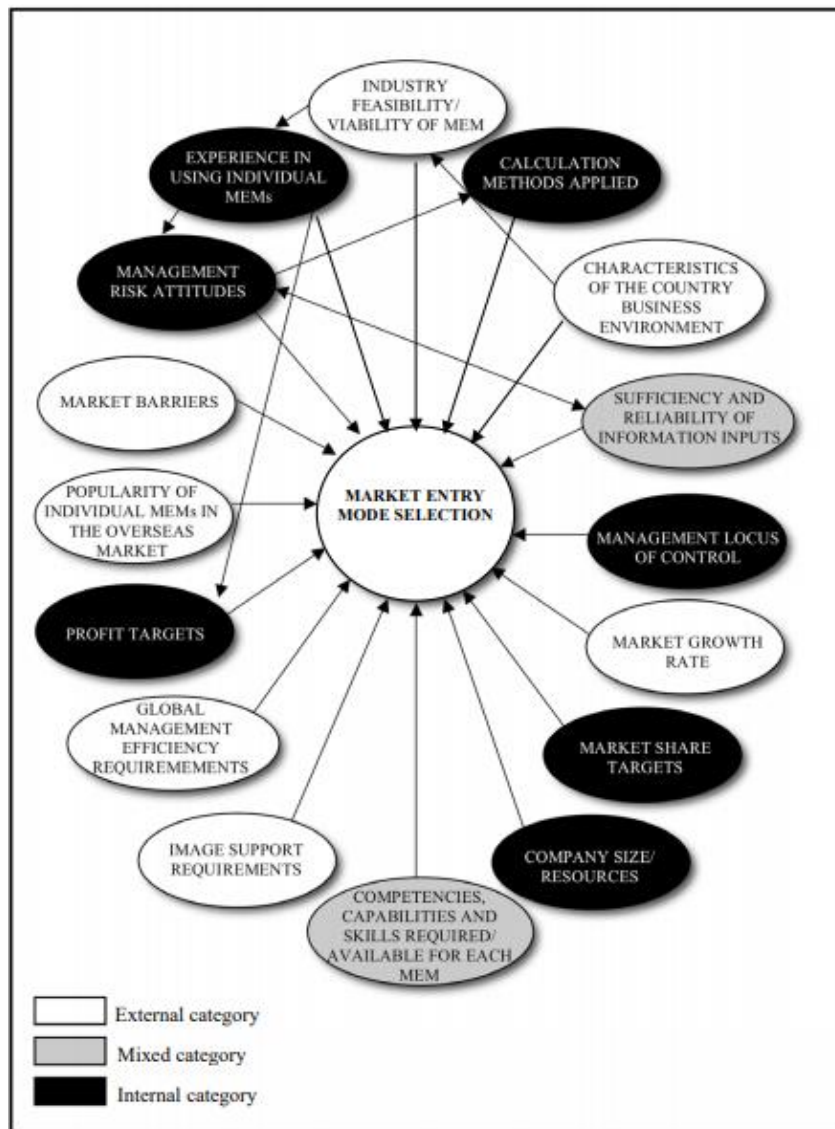


Figure 1. Factors affecting market entry modes selection (Source: Koch 2001).

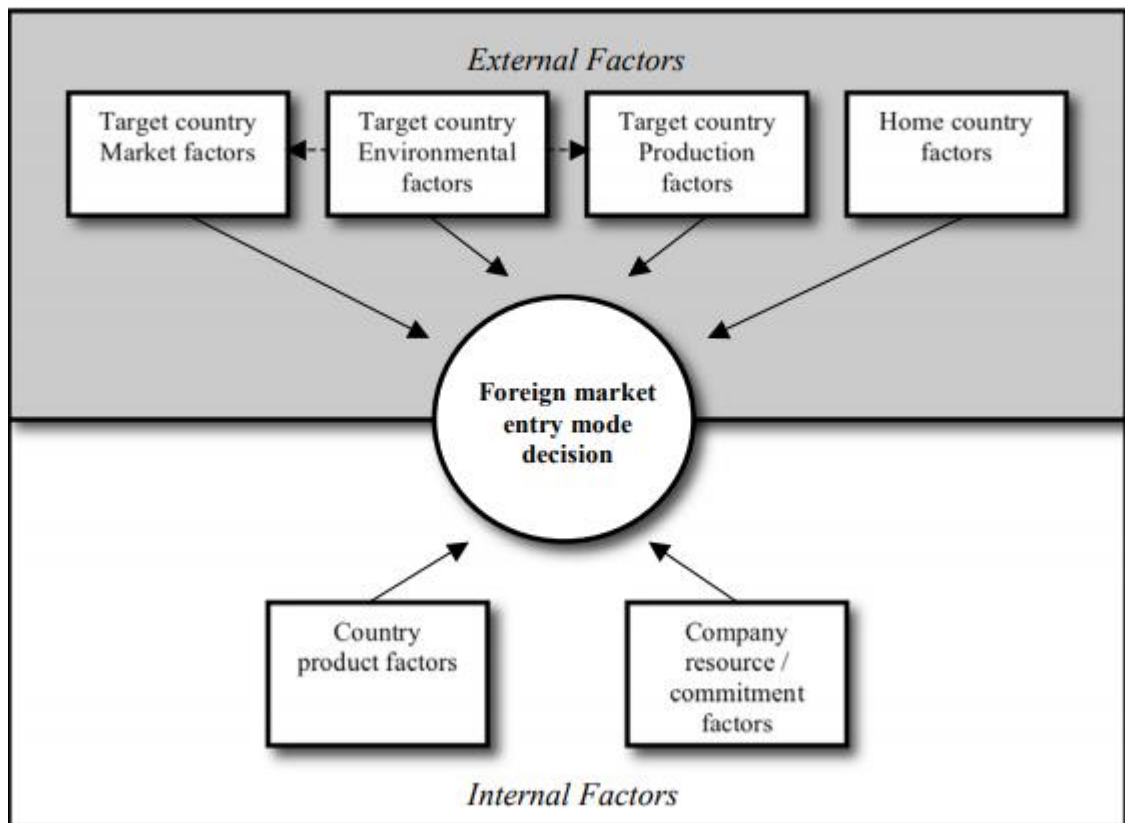


Figure 2. Factors affecting entry modes decision (Source: Root 1994).

a. Internal factors

Koch (2001) built a model of internal, external and mixed factors in relationship with market entry modes (MEMs) selection. As can be seen from his model, the internal factors include company size/resources, management locus of control, management risk attitudes, market share targets, calculation methods applied, profit targets, experience in using individual MEMs.

Brassington and Pettitt (2000) in their book of *Principles of Marketing* listed two other factors of speed and payback. Hollensen (2001) then added additional factors including product complexity and differentiation, risks and flexibility. In 2004, De Búrca, Brown & Fletcher pointed out the importance of Managerial Reasons factor. Relationships were another factor proposed by Frederick & Webster (1992).

Another model of MEMs selection and its relationship to different factors was introduced by Root (1994), in which he also focused on two main internal factors groups of (country) product factors and (company) resource / commitment factors.

b. External factors

Industry feasibility / viability of MEM, characteristics of the overseas country business environment, market growth rate, image support requirements, global management efficiency requirements, popularity of individual MEMs in the overseas market and market barriers are external factors proposed by Koch in his model. Similarly to factors in Koch's model, Hollensen (2001) in his book *Global Marketing: A Market-Responsive Approach* mentioned the following aspects: socio-cultural distance, country risk and demand uncertainty, market size and growth, direct and indirect trade barriers, competitive environment, and small numbers of relevant intermediaries available.

Root (1994), in his model, came up with four external factors groups: target country market factors, target country production factors, target country environmental factors and home country factors in which geographical distance was stated as an important factor. Adding to these two theories, Bell (1995) announced psychic distant, client follower ship and sector targeting factors. Later in 2004, De Búrca, Brown & Fletcher introduced laws and regulations as an additional element.

c. Mixed factors

In Koch's model, he also pointed out that sufficiency and reliability of information inputs and competencies, capabilities and skills required available for each member are the mixed category of both internal and external categories.

Applying to Touhula's case, the modes of entry will be discussed later in part 8.1 "Entry modes recommendation" of this paper.

4.4 Important factors of market success

Mazzarol (1998), in his research, defined four underlying dimensions of promotion and recruitment, image and resources, people and culture and coalition and forward integration as possible significant success factors for international education marketing. The results after the research showed that of these four factors, image and resources as well as

coalition and forward integration were found to be two critical indicators of market success.

Applying to the company case, building image and resources is an important factor to have successful market penetration. In addition, coalition and forward integration will support a long-term development. The matters regarding these factors are considered in Section 7 “Matters to take into consideration” and Section 8 “Market penetration strategies recommendation”.

4.5 A new marketing perspectives

In an article in Harvard Business Review, the three authors Ettenson, Conrado and Knowles (2013) gave a new point of view to the tool 4 Ps of marketing. The tool S.A.V.E was proposed with a more-opened view compared to the 4 Ps. The letters S.A.V.E stands for solutions, access, value, and education respectively. In fact, customers care for the solution that products/services bring to them, the access place of the products/services, and the value of the products/services instead of the price and the education subjects/issues through the messages given by the companies when promoting the products/services.

This new marketing perspective could be taken into consideration in this case in order to show the solution, the convenient access point, the value and the education point to the target group. Parents of children will look at the quality of Touhula’s teaching program (solution), the place where kindergarten is set up (access), what children will gain after studying at Touhula (value) and the information regarding the Touhula brand and Finnish preschool education (education).

4.6 Factors affecting children’s learning

To answer the question of what factors affect children’s learning, some research has been done.

The authors Hoang, Holopainenn, and Siekkinen (2018) worked on the research of “Classroom quality profiles and associations with children’s classroom engagement in

Vietnamese kindergartens". The results indicated that a teacher's age shows no and less relation to classroom quality profiles, while the teacher's years of experience shows a greater impact on the classroom quality profiles (Hoang et al. 2018, 4). In addition, the results suggested that "children were less disaffected in high-quality profile classrooms in comparing to children from lower-quality profile classrooms" (Hoang et al. 2018, 14). "Teacher's age and experience does not significantly affect children's classroom disaffection but affect children's classroom engagement" as they are more engaged in younger teachers' classroom (Hoang et al. 2018, 14).

The authors Hoang, Holopainen, and Siekkinen (2018) also had another related research on "Quality of teacher-child interactions and its relations to children's classroom engagement and disaffection in Vietnamese kindergarten". The results showed that while "teacher sensitivity and regards for children's perspectives was lower than those of Finland, Germany, U.S., and China; productivity and the instructional learning format were higher than those countries, except for Finland". It also indicated that "Vietnam kindergartens have a moderate quality of teacher-child interactions" in classrooms with "children in more well-organized classrooms were more engaged in learning" and "emotional support had a negative effect on children's classroom engagement". However, "children's disaffection was not significantly affected by quality of teacher-child interaction". (Hoang et al. 2018.)

Teaching practices also have an impact on the development of children's interest in reading and mathematics in kindergarten. Another research's results showed that when a teacher focuses more on child-centered teaching practices, children are more interested in reading and mathematics than when the teacher focuses more on teacher-directed teaching practice. (Lerikkanen, Kiuru, Pakarinen, Viljaranta, Poikkeus, Rasku-Puttonen, Siekkinen & Nurmi 2012)

Another study on the relationship between classroom organization and teacher stress and learning motivation in kindergarten children was published in 2010. The results revealed that low teacher stress and high classroom organization predicted high learning motivation in children, which supported their level of phonological awareness. Children's learning motivation is, therefore, a connection between teachers' stress levels and children's phonological awareness. Through the research, it can be seen that teachers' pedagogical

well-being and classroom organizational quality have vital roles in motivating children's learning. (Pakarinen, Kiuru, Lerkkanen & Eur J Psychol Educ 2010.)

The connection between the mentioned research results and this paper is about the classroom quality especially in terms of teacher and the teaching method. By understanding these issues, Touhula could have insights into the ways of organizing classroom and training teacher effectively.

4.7 A solution case in building a preschool in a high-density population city

In the time of urbanization and with high-density of population, having a safe playground for children is what parents are looking for. Understanding the need of spaces for nursing and public educational places, Vu Trong Nghia Architects designed a kindergarten with green solutions. The school has a green triple-knot-shape drawn roof while being a garden as well as an outdoor playing area for children. The school model also brought the agricultural education experience for the children in Bien Hoa city, Vietnam. (Vu 2016.)

The mentioned case could support the organization with a view when designing and building the institution in a highly populated city.

5 KINDERGARTEN INDUSTRY VIETNAM MARKET RE-SEARCH

5.1 Current situation

5.1.1 Related statistic of the targeted market

Population of children as the targeted group:

Touhula's target children group is at the age range of 1 to 6. In this section, the author finds the statistics of the target children group in Vietnam in 2018.

According to United Nation's statistics, the population in Vietnam in 2016 was less than 93 million with the number of children at the ages of 0 to 4 was about 7.7 million in both genders. This means that in 2018, the number of children at the ages of 2 to 6 was about 7.7 million. According to Population statistics, in 2017, about 1.6 million children were born; this means that in 2018, there were about 1.6 million children at the age of 1. Therefore, in total, from two above statistical data sources, in 2018, there were about 9.3 million children in Vietnam in the age range target.

On 25 September 2018, the updated population was less than 97 million citizens. The number of children in urban areas (about 5.2 million) was 2.2 times the number of children in rural areas (about 2.5 million). (United Nations 2017.)

In Finland, the population of the whole country was 5.5 million in 2016 with the number of children aged 0 to 4 less than 300,000 (Statistics Finland 2017). The number of children in urban areas (about 209,000) was 2.6 times more than the number of children in rural areas (about 80,000) (United Nations 2017). This means that in 2018, there were less than 300,000 children aged 2 to 6. In 2017, the birth statistics were recorded for about 50,000 children, which means that there were about 50,000 children at the age of 1 in 2018. Therefore, in 2018, there were about 350,000 children in the targeted age range in Finland.

Comparing the numbers, it can be shown that the number of children in the targeting age group in Vietnam is nearly 27 times higher than that of Finland. Therefore, it is impractical for Touhula to target the whole country. Rather, targeting one or some cities at first in Vietnam will be more feasible.

According to KHV Investment & Consulting (also known as Vietnam Plan) Company's statistics, the birth rate in Vietnam was stable at the rate of 1.96 over the last 4 years. Thus, the number of children being born is expected to be possibly steady in the coming years.

Education statistics

Here are the statistics of kindergarten education in Vietnam as of 30 September 2017 with the unit of thousand. There were about 4.6 million kindergarten pupils with 15,241 kindergarten schools within the country, about 155.8 thousand classes and 266.3 thousand teachers. From the data available, it shows that the average number of pupils per class was 30 and the average number of pupils per teacher was 17. (General Statistics Office of Vietnam 2017.)

Table 1 Kindergarten education as of 30 September 2017 by items, indicator and year (Unit: thousand) (Source: General statistics office of Vietnam 2017).

	Prel. 2017-2018
Total	
School	15,241.0
Class	155.8
Teacher	266.3
Pupil	4,599.8
Pupils per class	30.0
Pupils per teacher	17.0

In addition, the general statistics of Ministry of Education and Training about the kindergarten in the year of 2016-2017 showed that about 500,000 children more took part in kindergarten compared to the previous year of 2015-2016.

APPENDIX 3 shows the statistics of kindergarten education in different cities in Vietnam. The order is according to number of pupils in each city, from highest to lowest. Throughout the country, per city, the average number of pupils was about 73,000, of schools was about 240, of classes was about 2,470 and of teachers was about 4227. The statistics were from the General Statistics Office by the end of the third quarter of 2017 (updated August 2018).

5.1.2 General information of Kindergartens in Vietnam

Three types of facilities are provided for children at early stages, including kindergarten, nursery schools and day care centers. These types are organized privately, publicly or citizen-based. The differences among these types of organizations are:

- Public kindergartens/nursery schools/preschools set up by government. The government invests in building the facilities and ensuring fees for regular spending tasks.
- Citizen-based kindergartens/nursery schools/preschools set up by local communities. They invest in the construction of material foundations and ensure operation funding. These are also supported by local administrations.
- Private kindergartens/nursery schools/preschools established by social organizations, socio-vocational organizations, economic organizations or individuals. They invest in the construction of facilities and ensure the operational funding with non-state budget capital sources. (Ministry of Education and Training 2008.)

The government has regulated law decisions regarding preschool education, depending on the types of organizations. Therefore, a foreign organization who would like to operate in the market should check on this before preceding into further action.

5.1.3 PESTEL analysis of the kindergarten industry in Vietnam

A PESTEL analysis is used as a tool to evaluate the external environment and its effects on Touhula. The PESTEL analysis investigates the external environment a business operates in. Analyzing these factors helps the business to identify potential opportunities as well as threats that might affect the business directly or indirectly.

Political factors

For any business, knowing the regulation before entering a new market is necessary. Regarding political factors of the preschool industry in Vietnam, the company should take into consideration of the skills requirements of teachers and curricula, self-management issues of teacher development programs, and foreign trade policy and trade restrictions. These political parts will identify the first two issues, while the last one will be analyzed later in Section 7.4 “Legal issues”

The requirements for a person to become a preschool teacher is to have the diplomatic qualification at a vocational school. A teacher has more advantages when he/she also has qualified foreign language certificate of A2 or higher and an information technology certificate of IC3 or higher. To have practical experience before becoming a real preschool teacher, he/she should carry out a traineeship or be an assisting tutor at a public or private preschool. (Vocational education website 2017.)

However, the requirement of diplomatic level qualification has been proposed recently to be higher in the future. The proposal was that a teacher should get an associate’s degree from college. The reason for this change is to improve the quality, ability, professionalism and personality of teachers. People believe that with this improved requirement, the school violence caused by teachers to children within schools will be avoided and reduced. (Le Dang 2017.)

The government also issued the law that teachers can evaluate themselves or preschools can assess teachers based on the following criteria and abilities

- Teachers’ quality (in both ethics and working style)

- Professional development (self-professional development and nurturing, caring and educating towards comprehensive development of children)
- Building a safe, healthy, friendly educational environment with democratic rights,
- Developing relationships among school, family and community (to improve quality in raising, educating, nurturing children, and to protect the children's rights)
- Using foreign language (mainly English) (or ethnic language of children)
- Applying information technology
- Demonstrating artistic ability in nurturing, caring and educating children (Luat-Vietnam (in English: Law of Vietnam) 2018.)

In regards to curriculum, the Ministry of Education and Training distributed the circulars with requirements on content, methods of preschool education and evaluation of child development. The goals of the curriculum are to support the physique, perception, language, as well as love, social skills and artistic development. The curricular suggested specifically on activities, schedules, exercises, food nutrition, and so on for the children depending on their ages. Preschool institutions should build the teaching plan based on this and adapt the program to make it suitable locally. There might be small changes and updates year after year. Therefore, preschool institutions should review the curriculum again after each year. (LuatVietnam (in English: Law of Vietnam) 2009.)

The Ministry of Education and Training also suggested to support parents with skills and ability in nurturing and educating children as well as engage them in building proper upbringing and educating models. In addition, there should be professional training programs to support the teachers at private and citizen-based schools. (Vietnam Journal of Education 2018.)

Training for teachers can be performed in different methods. Teachers should take part in training classes organized by schools, department education and training, self-study and development and take part in related events, etc. Moreover, the teachers should earn points and salary based on their ability and contributions. (Nguyen, V. 2017.)

Economic factors

According to Phuong Dung (2017) from Dantri News (in English: Intellectuals News), the education industry inflation rate in September 2017 was 10% as a result of changes in

public service fees. In September 2018, the ministries' representatives had given out the forecast that the education fee inflation would be under 4% for the whole year. The government also set the goal for 2019 of maintaining the inflation rate of around 4% (Minh Anh 2018). With the government maintaining the inflation rate, it is expected that the education fees will be maintained at least for the next year without any changes.

Costs of kindergarten education

For public kindergartens and nursery groups in Hanoi, the costs are mentioned in Table 2.

Table 2 Tuition fee of public kindergartens and nursery groups in Hanoi (Source: People's Assembly of Hanoi 2017 & 2018).

	Tuition fee in the study year 2017 – 2018 (VND)	Tuition fee in the study year 2018 – 2019 (VND)
Pupils studying at institutions in urban area	110,000	155,000
Pupils studying at institutions in rural area (except for mountain area)	55,000	75,000
Pupils studying at institutions in mountain area	14,000	19,000

However, this tuition fee does not include the dining fee and other additional services fees such as organizing additional skills classes of dancing, English, drawing, life skills, etc. These could add up to total of 1 million VND (38 EUR) to 3 million VND (114 EUR).

For private kindergartens, schools decide the tuition fee themselves. For example, Vietnam Australia International School (VAS), the tuition fee is about 12 million VND per month for school year 2019-2020. For Vietnam America Kindergarten School (VASS), the tuition fee is about 4.7 – 5.9 million per month for the same school year. All of the above tuition fees do not include dining fees and other services fees. The tuition fee of Japanese International School for bilingual program for the same year is 8 million per month, including the dining fee.

Average salary

APPENDIX 4 presents the monthly average income per capita at current prices by Cities and Income Quintiles in 2016. The whole country had an average income of 3098 thousand VND with the quintile 1 of 771 thousand VND and quintile 5 of 7547 thousand VND. The statistics was from Vietnam General Statistics Office for the year 2016, updated in August 2018.

With the number of private schools increasing, the competitiveness will be increasing. As a result, the preschool education will be continuously developed. In addition, in 2017, GDP in Vietnam was 6.8% and GDP per capita was 5.7%, a rising trend from previous years (World Bank 2018). With the growth in the economy, industries including preschool education are expected to improve.

Social factors

According to Vietnam General Statistics Office, the number of children taking part in preschool is estimated to be 5.6 million by 2020. Table 1 shows that the number of pupils taking part in kindergarten and nursery school was about 4.6 million for the school year of 2017 - 2018. This means that after two school years, 1 million more pupils are going to take part in the preschool system. However, for many reasons, public-school system cannot be expanded. Therefore, to meet the demands and needs of citizen, the private school system takes this opportunity to flourish from now on. (Minh Hoang 2018.)

A number of issues has arisen. First, the scale of preschool development is not even in different regions, and the quality is not stable. The preschool education policy network is not synchronized. The resources invested in the industry are not adequate with the requirements. According to the regulations, the minimum number of teachers required for each kindergarten class is 2.2. However, in practice, at some regions, the number stays at 1.5 to 1.8 teachers. The reason for this low number of kindergarten teachers is due to high pressure and low income. It is estimated that about 33 thousand kindergarten teachers are needed. In the long term, the inadequate teacher number could lead to poor quality education and insecure learning environments for kids. (My Dung/VOV 2018.)

Due to the lack of public schools, parents have to accept the fact of sending kids to independent nursery groups or small family groups, which might contain risks. Lacking expertise, diplomas, skills and working under high pressure when taking care of a lot of children are the reasons for the acts of violence against children. More violence incidences were also reported from independent nursery groups. This issue has brought up a lot of opinions from the public, especially from the parents with the children of preschool age (My Dung/VOV 2018). This explains for the reason that the parents are considering private and international schools besides public schools. The citizen-based option comes at last when they are unable to find a suitable place for their children.

Parents with greater incomes are looking at having their children study in international schools with better education methods or private schools with foreign teaching methods in order to promote the children's growth. Traditional education is not as highly evaluated as before.

More private schools mean higher competition, and these places are constantly looking for ways and updated trends to improve themselves and to stand out more. New trends in preschool education include professionalizing the preschool education industry, the tendency to adopt flexible education models and programs in which teachers identify the ability of each student and individualize the instructional program, and the information technology integration in the education. (KidsOnline 2019.)

Technological factors

Technology is a necessary part attaching of education in the progressing modernizing era. Therefore, schools regularly look for ways to integrate technology into their management systems and study curricula. Preschools have the ability to afford televisions, interactive panels and multifunctional rooms with computer systems and projectors with internet connections to create the conditions for teachers to engage these into teaching methods. Additionally, there is a lot of new educational software such as Office, Lesson Editor/Violet, Photoshop, Converter, Movie Maker, and so on, which support designing lessons and managing the education in different activities (finance, database, etc.). (Tran n.d.)

However, there are still limitations regarding technology knowledge and skills. Thus, schools also support and expect teachers to get use to new tools and software to integrate them into teaching methods.

Technological development is necessary in engaging children with parents while they are at school. Some schools, for example, set up cameras in the classrooms, and allow the parents to see their kids through the computer screens whenever they want. There are also some preschool education managing apps and software in use to connect children, parents and schools together, such as KidsOnline. This app allows parents to receive notifications from children's classes and schools, check health and activities throughout the day, register activities of dining, picking up and extracurricular activities, check fees, etc. (KidsOnline 2019.)

Environmental factors

Many preschool institutions focus on ensuring a green, clean, beautiful and safe environment for children from small acts such as planting trees, cleaning toys, and commitment to food safety, recycling, saving energy, and so on. In addition, the tools, toys and other equipment should be recyclable to not only save funds in the long term but also to have a good impact on the environment.

Environmental education is considered as an important issue in having this attachment to the school curriculum in Vietnam, as children at the age of preschool are forming their attitudes as well as their perception (Bui 2014). Having small pupils equipped with the environmental knowledge creates shared environmental value in the future for both the children and the society. Schools can have students involving in protecting the environment through small activities such as planting trees, taking care of gardens, saving water, recycling, etc.

Legal factors

The first important legal factor is to ensure the safety for staffs and especially for children. The recently raised issue of children as victims of teacher violence at preschool institutions has raised a big matter in parents' concerns. The government has issued the law regarding pupils' safety within preschool institution, including the quality of facilities,

equipment, toys, environments, foods, and so on (abilities, skills, attitudes, stress level of teachers and staffs; suitability of teaching methods and curriculum). In addition, the government will enhance the number of inspection visits at private preschool facilities institutions to ensure the above-mentioned issues and investigate whether the institutions follow the enacted regulation, to avoid possible unfortunate accidents and to find possible solutions. (Phan 2016.)

Student rights have been regulated by government. Students have the rights to be raised, nurtured, and educated according to the goals of the program that the Education Ministry enacted. Disabled children integration is according to decisions and can follow the individual development plan. Children have the right to get health care and be entitled to free medical examinations and treatment at public medical establishments. They can participate in activities developing aptitudes and get reduced fees for public entertainment services, for example. (Education Ministry 2008.)

There are also general requirements for preschool that Touhula should take into consideration, such as regarding number of students and teachers per class, minimum spaces and funds per children, infrastructure, etc.

The requirements regarding number of pupils and teacher per group have indicated the following issues. For nursery group (for children from 3 months old to 3 years old), the maximum amount of children between 3 to 12 months age is 15, between 13 to 24 months old is 20, between 25 to 36 months old is 25. For kindergarten groups (for children from 3 to 6 years old), the maximum number of children between 3 to 4 years old is 25, between 4 to 5 years old is 30, between 5 to 6 years old is 35. If the kindergarten/ nursery class has a disabled child, the number of children in a class will be reduced by 5 and a class will not have more than 2 disabled children. For nursery groups, 2.5 teachers should be arranged. For kindergartens of whole day studying, 2.2 teachers should take care of each class, while for kindergartens of 1 session per day, 1.2 teachers should be arranged for each class. This is applied if the school arranges enough children according to nursery groups of kindergarten classes according to the above-mentioned rules. For the schools that cannot arrange enough children according to groups or classes according to above rules, the number of teachers can be calculated on the average age of the children's group or class. (Government of Vietnam 2018.)

Specifically, the following table describes the ratio of number of children from different age groups per one teacher.

Table 3 Ratio of number of children from different age groups per one teacher. (Government of Vietnam 2018.)

Type of class	Age group	Number of children per 1 teacher
Nursery group	3-12 months old	6 children
	13-24 months old	8 children
	25-36 months old	10 children
Kindergarten class (2 sessions per day: morning and afternoon)	3-4 years old	11 children
	4-5 years old	14 children
	5-6 years old	16 children
Kindergarten class of 1 session a day	3-4 years old	21 children
	4-5 years old	25 children
	5-6 years old	29 children

5.1.4 Education methods

Traditional preschool education methods are not highly valued as before by parents. They are constantly looking for innovative methods that support their children's unlimited growth in personality and intellect as well as in their creativity. This demand requires that educators look for more natural, unlimited and no pressure education. Some institutes have already been engaging advanced education methods in their curricula in addition to the traditional methods required by the government.

Many approaches to advanced education from foreign countries are highly valued. This includes Integrated approach or Development approach. Along with these are the following effective teaching methods: Steiner, Montessori, High Scope, Reggio Emilia, Howard Gardner's multi-faceted intelligence and so on.

Montessori, which is a teaching method formed by Educator Maria Montessori in 1907 in Italy, seems to be the most well-known among children's parents in Vietnam. To explain the method, it supports the learning and living skills, and five kids' senses through learning toys that are capable of playing, developing senses, perception and logical thinking skills for kids. It also promotes the development of child empowerment and helps

them to become disciplined voluntarily. Each Montessori room has 115 learning tools to support 5 areas of kids, including perception ability, mathematics, language, life skills and a first-step understanding the natural world and culture. (VnE 2013.)

Reggio Emilia is another teaching approach formed by the Italian psychologist Loris Malaguzzi. While Montessori focuses on developing personal skills for kids, Reggio Emilia concentrates more on group work and cooperation skills. The method opens the door for imagination and stimulates creativity in kids through the activities of drawing, molding, composing arts, etc. (Hanoi Academy Hub 2018.)

Besides these approaches, there is Howard Gardner's multi-faceted intelligence, in which Howard mentions the opinion that each kid has his/her own special capabilities that need to be discovered and nurtured. The intelligences includes the typical one in school, the art intelligence and the personal intelligence (language, mathematics, music, physical, spatial art, introspective and social, and natural, etc.). This theory supports the educator to support the brain growth of kids. (VnE 2013.)

Project Approach, suggested by Lilian Katz, gives and supports chances for kids to follow, learn, and discover about the issues that they are curious about and really interested in. This method promotes the process of self-researching, independent thinking and nurturing the learning passions in kids.

High Scope Curriculum with Plan-Do-Review activities allow kids to self-start the plan of discovering, implementing and evaluating the process of implementation under the lead of teachers. (HighScope n.d.)

Steiner methods, which are also called Waldorf education, is an education approach founded by Rudolf Steiner, an Austrian scientist and philosopher. This education takes into account a child's development academically, emotionally and spiritually by focusing on artistic activity and imagination development. (Steiner Waldorf Schools Fellowship n.d.)

International schools teach the children in English and Vietnamese. In Vietnam, international schools are popular with the study system integrated from countries such as US,

Australia, Japan, Korea and the UK. These international schools are quite active in engaging the above mentioned methods into teaching pedagogy. Therefore, parents also show their interest towards the education of international schools in Vietnam. However, private local schools also notice this trend and gradually think about applying different approaches into the curriculum.

5.2 Opportunities and trends

With the high population, limited number of public schools, and the uncertainty of citizen-based preschools' quality and safety, it is an ideal environment for private schools to implement and grow in the market. Touhula could make use of this and take part in the Vietnamese market. The requirements of teacher ability as well as sustainability also go well with Touhula's requirements. In addition, parents' preference of looking for qualitative and effective international schools to promote children's growth is an opportunity to show Touhula strengths in the market.

Three new trends that can be seen from preschool are to professionalize kindergarten education to have flexible education pedagogy application and information technology application in preschool education (Kidsonline n.d.). Understanding the new trends could support Touhula to build an integrated and suitable pedagogy for children in the targeted market.

Last but not least, Finland's education reputation has received more notice than before to Vietnam recently. Being one of the first Finnish preschools to enter the market can make use of this as well as to prove this statement. As the education reputation is popular among Bachelor's and Master's groups but not with parents of small children, an effective penetration plan and a powerful marketing plan will be needed in order to spread the news.

5.3 Competition and challenges

The challenges include the competition, funding and adaptation to the market. Touhula has to compete with the international schools as well as the teaching methods currently available on the market. These international schools are from Japan, Korea, US, Australia,

Canada, and so on and they have already engaged different teaching methods into their pedagogies. Therefore, emphasis on Touhula's value proposition to build the awareness and differentiate itself from others is essential.

Moreover, if entering Ho Chi Minh City, Touhula also needs to compete with Finland-Way preschool, which is a pioneer opening its first preschool in March 2019 (Education Finland 2018). This Finnish preschool has a FinlandWay® preschool concept, is in partnership with HEI School to work on pedagogy and operated by Quality Training Solution Vietnam.

In addition, Touhula should take into consideration government regulations when planning to enter the market. The entry mode is also needed to be considered due to the geographical and culture difference. Adaptation to the market is needed, especially with the current model. It is recommended to find a partner to cooperate with on the market, employ local teachers for training in addition to Finnish teachers. More of these can be found in what to take into consideration and recommendation parts.

6 SURVEY RESULTS

The survey received 221 reasonably valid responses. Of all these 221 participants, most of them are from Haiphong city (72.9%); the rest of them are from Hanoi (26.2%), Ho Chi Minh City (0.5%) and Vung Tau (0.5%). The largest age group is 25 – 34, which accounts for 66.1%, followed by 35 – 44 with 29.9%. The household monthly income groups that make up a high percentage are 11 – 20 million Vietnam Dong (VND) (about 418 – 761 EUR) (38.5%), 20 – 30 million VND (about 761 – 1141 EUR) (20.4%) and 6 – 10 million VND (about 228 – 380 EUR) (24.9%). The percentages of groups with income from 0 – 5 million VND (about 0 – 190 EUR) is 7.6%, 31 – 40 million VND (about 1178 – 1521 EUR) is 4.5%, 41-50 million VND (about 1559 – 1901 EUR) is 0.5% and more than 50 million VND (about 1901 EUR) is 3.6%. About half of the participants have their children take part at private or international preschools, while the others have their kids participate in public and citizen-based preschools.

When being asked about a country with good kindergarten education that the participants know about, of 160 answers, Japan was the most well-known option with 84 mentions. The following popular countries include US (19), Vietnam (15), the United Kingdom (10), Finland (10), Australia (8) and Singapore (7). The percentage of participants who had not yet heard of Finland's education is 16.3%, while others have known about this mostly through social media channels.

In regards to children's development aspects, five facets are proposed: Vietnamese native language, Vietnamese and an additional language, physical states, adventure of discovering the outside world and arts and culture. Of all the options, parents care most about children's physical states. Language comes as second option with bilingual study being more preferred. Arts and culture received least priority among parents. Discovering the outside world is not the first consideration when coming to parents' thoughts; however, it accounts for a large number of second and third priority positions. Some parents also mentioned that they would like to have their children to have comprehensive development of all the five facets. Besides these five aspects, parents also expressed their interests in children's development of logical thinking, mathematics, emotional intelligence and proper personalities to behave at home and in society, independence and life skills.

Parents were then asked whether they were interested in having children study in Touhula's model. About 73% of all parents agree or to some extent agree to have children study in such a model. When being asked to share their opinion on the Finnish model, they expressed the following issues:

- While some parents had also heard of Finland having a good education system, others have not heard about or heard much information about Finnish education
- A great number of parents expressed their concern about the tuition fee, whilst others also think that place, safety, environment and real quality of pedagogy and teachers matter as well
- They do not know whether the Finnish model environment is suitable with their Vietnamese children and whether Finnish education would result in a cultural shock for children when living in the Vietnamese environment
- They consider how the school will encourage potential and inspiration for children
- Some people show positive attitudes that the model will develop each child's ability and form child's personality naturally, without pressure.

Generally understanding Touhula's model while considering the families' income, about 77% of parents are willing to pay 2 – 5 million VND (about 76 - 190 EUR) per month for this school model. The rest, about 23%, are willing to pay 6 – 10 million VND (about 228 – 380 EUR) per month.

Of all four of Touhula's educational themes, the highest of preference goes to the language model with 34.4%, followed by the adventure model of 29.9% and the exercise model of 28.1%. The art and culture model receives the least attention.

Parents also gave advice for Touhula if entering Vietnam market. Touhula should do more research regarding culture, environment, average incomes, and the place of organizing school. Touhula should draw out its value propositions and its unique points clearly to target customers when penetrating the market, especially on its pedagogy and the teachers' qualification while still adapting these to Vietnamese environment and culture. They also mentioned that there should be focus mostly on physical states, language and life skills. In addition, some parents express their concern regarding the time it takes children to school and picking them up. In Vietnam, they could work from early morning around 7 a.m. until 6 p.m. on weekdays. Regarding marketing aspects, a few participants suggested organizing information dissemination conferences to increase the knowledge on Finnish education. Regarding place, the school is expected to be organized in an area with a highly cognitive citizen area, green environment and with suitable living standards. A centered city location seems to be more convenient in order to reach potential customers; however, in case of unsuitable environment (crowded, unsafety, etc.), a school can be built outside of the center while a school bus service should be provided to pick up and return children at certain points. Regarding service and cost, a few parents suggested building adjustable or suitable pedagogies for different target groups of low, medium and high incomes. Some other opinions include receiving children from the age of six months old, testing the model in the Vietnam market, building a school base first and developing gradually into a school chain, and developing a Finnish model from kindergarten to high school.

(1 EUR = 26,297.80000 VND; Monday 18.3.2019 based on the following exchange rate website <https://www.exchange-rates.org/history/VND/EUR/T>, accessed on 19.3.2019)

7 MATTERS TO TAKE INTO CONSIDERATION FOR TOUHULA

7.1 Expectation

Touhula needs to check the findings and see whether these are suitable with what they are expecting. Clear and achievable objectives are needed to be set. Based on the findings, if the results show that the market is suitable for expansion, a clear strategy on market penetration as well as a marketing plan have to be drawn out.

7.2 Human resources

Touhula, in the first step, has to work on the penetration plan and have all members of the company know about the information. Employers at the head offices should be committed and can give opinions and be involved in the process of a building plan. It is recommended to have a team member from the local country or to have a consultant, a partner from the local market in order to gain insights and reduce misunderstandings and barriers.

As mentioned in the above market research, Vietnam is facing the lack of preschool teachers due to high pressure and low-income occupation. Therefore, it is advised that Touhula takes this into account in the employee recruitment and retention process. In case of licensing Touhula's model, the local operator should take into account recruiting the employees with quality and meet the requirements. Touhula should provide training to these teachers. It is recommended to have a few Finnish teachers at the schools to support the mutual understanding between two parties.

7.3 Financial resources

Depending on the mode of entry, the requirements for financial resources is different. In consideration of financial risks, licensing seems to be a better option than cooperating with a local preschool and local real estate investors. More information of the mode of entry can be found in part 8.1 "Entry Modes Recommendation".

Besides the company's own funds, Touhula can ask for the funding from supportive organizations, such as Finnpartnership, Business Finland and the Finland-Vietnam Innovation Partnership Programme. More information of these organizations can be found in part 8.2 "Partner recommendations". The different monetary systems also play an important role, as changes in monetary value could result in increases or reductions in the fund required.

7.4 Legal issues

Depending on the mode of entry selection, the company can have a local partner or consultant to support with legal advice. The provisions on cooperation and investments with foreign institutions in the field of education need to be taken into consideration. More information on this can be found from this web page: <https://luatvietnam.vn/giao-duc/ngghi-dinh-86-2018-nd-cp-hop-tac-dau-tu-cua-nuoc-ngoai-trong-linh-vuc-giao-duc-164069-d1.html#noidung>. The government has updated the provisions on cooperation and investment with foreigners in the field of education in June 2018.

There are three ways to set up and operate an international school in Vietnam. The first is that the international school is set up as an educating and training cooperation by a private local education institution and a foreign approved education institution. The second is that the international school is set up with a foreign investment fund while the foreign fund should be less than 100%. The third is to set up a representative office of the foreign institution in Vietnam. This is not suitable in the case of Touhula. With the second option, the time for the international school operated is limited by 50 years, while the first one has a time limit of five years but can be extended no more than five years each time the extension is applied for. In addition, the number of Vietnamese students taking part in the study institution is regulated to be less than 50% of the total pupils taking part in the international school. (Government of Vietnam 2018.)

7.5 Customer profile

The targeting customer groups in Vietnam are medium class and upper medium class parents of kids at the ages of kindergarten and preschool. To be more specific, the targeting group should be the group with the income from quintile 5 in APPENDIX 4. They are more willingly to pay and have children study in an international environment with better teaching methods.

Based on the survey answers, the author identifies the participants profiles who totally and to some extent agree to have children to take part in the Touhula school model and are willing to pay 6 – 10 million VND (about 228 – 380 EUR). Of all 39 people, 87% have a Bachelor's degree or higher. Only one of them is aged 45 – 54 and has not yet married; the rest are at the ages of 25 – 44 with a larger percentage belonging to the age group of 25 - 34. The percentages of household average income groups of 11 – 20 million VND, 20 – 30 million VND, 31 – 40 million VND and more than 50 million VND are 38%, 23%, 8% and 13%, respectively. The remaining 18% belongs to groups with lower average incomes per month; however, even though they are willing to pay 6 – 10 million VND for the school model, it is not practical in the real case, as it is higher than their income. Therefore, it is feasible for Touhula to target a customer group with the household average income from 11-20 million VND per month or higher. In addition, about 56% of participants have already had children or had the intention for children to join private or international school while 18% participants choose for public option and the other 18% parents have kids join citizen-based schools. The rest have not decided on the future option yet. In regards to cities background, when comparing to the total amount of 221 participants, about 19% parents from Hanoi belong to the group of 39 participant profiles who would agree to have children to take part in Touhula school model and are willing to pay 6 – 10 million VND. In Haiphong, the percentage is quite similar to Hanoi, which is about 18%. Only one participant from Ho Chi Minh City is also in this group.

In conclusion, the customer profile of Touhula is a parent age 25 – 44, with a household income of 11 million VND and higher and holding a bachelor's degree or higher. But considering parents' affordability of Touhula school fee, the targeting group should be parents with the monthly income from quintile 5 in APPENDIX 4.

7.6 Service modification & unique

In case of consulting for Touhula's model, the company can consult partners from the partner recommendation list for modification. The questionnaire results may support Touhula with the decision of choosing the theme model that Vietnamese parents are interested in the most. The curriculum of Touhula also needs adaptation according to the Vietnamese Ministry of Education and Training's guidelines.

While considering service modification, Touhula should maintain and emphasize its unique points and its value propositions of the value that the service can bring to the children and the parents. The modification can be made in regards to language, culture and business environment.

8 MARKET PENETRATION STRATEGIES RECOMMENDATION

8.1 Entry modes recommendation

In the case of entering the Vietnamese market within the education industry, according to the regulations, Touhula can choose to either cooperate with a local education institute or invest foreign funds to build the preschool. However, with the case of foreign investment, the government does not allow 100% foreign funds and requires the involvement of at least one domestic organization. The case of having a representative office is not suitable to apply for. With the two possible methods of entering the market, Touhula can choose from three market entry modes: licensing, acquisition and joint venture.

Licensing the school model seems to be the option having the least risks of the three modes, as the company does not need to enter the market and its model is applied in Vietnam market by the organization that bought the model license. Acquisition is another way that helps Touhula gain a quick establishment in the market, and if the company acquires a current preschool on the market, existing customers are already there. However, as the government does not allow 100% foreign funding, Touhula can still opt for the option of buying mostly instead of all the stock of the organization. Nevertheless, an acquisition seems to be the means with the most risks of all three modes of entry. Besides the two options mentioned above, Touhula can go for a joint venture and cooperate with a local organization in the foreign market while receiving knowledge advice and other support from the partner. With this market entry mode selection, the risks will be divided among parties. Touhula can choose to cooperate with or buy stock in a local preschool. Another option, which takes more time to implement, is investing foreign funds together with real estate investors when building an urban area. They will have an urban living area plan when high buildings are built together with the facilities in the same area. When cooperating with them, Touhula can build its own preschool to serve this urban area without any competitor in the area.

8.2 Partner recommendation

Currently, Touhula is in partnership with HEI School. HEI School currently has been partnered with some organizations to build the schools internationally based on the HEI School concepts, which were researched and proven with results.

Wise Consulting Finland (WCF) is a company that could support with school concept implementation and training courses. WCF has consultation services for setting up or exporting a Finnish style school or educational program in adaptations with local contexts. The company also works with Finnish partners to provide leadership management and teacher training courses. The company has an office in Hanoi as well.

The organization Finnpartnership has three supportive categories of business partnership support, matchmaking and information. Business partnership support is financial support for the planning, development, training and pilot phases of projects involving developing countries. Matchmaking is to introduce companies operating in developing countries that are currently seeking business partners in Finland. Finnpartnership also supports the country and industry information with events, links, reports and analyses. Business Finland is a similar institution that offers funding, building an international network, rating the project potential, planning on the international strategy.

Quality Training Solutions Vietnam (QTS) is a leading education and training organization in Vietnam. This is the organization that cooperates with FinlandWay preschool to implement the first Finnish preschool in Ho Chi Minh City, Vietnam.

In regards to cooperating with local kindergartens, licensing the school model seems to be the least risky option for entering the market as the first step. The other option is to acquire control over a local kindergarten by buy most of its stock. However, the option depends on the resources of the company. On choosing a suitable local kindergarten to license the model or to acquire, Touhula should set a standard requirement background such as: it is an international school, it has already applied some foreign teaching methods, and it has a similar tuition fee range if Touhula is about to keep the existing customers, and so on.

In addition to the above options, Touhula can also be partnered with real estate investors that are investing in building new urban citizen centers. Real estate investors usually have plans on building kindergartens in the area; therefore, Touhula could invest in the plan and operate the kindergarten by itself. However, this takes more effort and has more risks than other options. Hence, the company can have this as an expansion option, or for a later step in the future.

8.3 Location recommendation

Table 4 Summary table of pupils numbers of 8 cities with highest average income in the whole country from 2 tables in APPENDIX 3 & 4.

Cities (in order of high to low average salary in the whole country)	Average monthly salary (position in the country and amount) (2016)	Average monthly salary of citizens of quintile 5 (2016)	Number of pupils (position high to low in the country and amount) (2017)
Ho Chi Minh	1 st – 5,109,000 VND	1 st – 11,985,000 VND	2 nd - 329,065 pupils
Binh Duong	2 nd – 5,005,000 VND	4 th – 11,819,000 VND	8 th - 95,347 pupils
Hanoi	3 rd – 4,875,000 VND	3 rd – 11,941,000 VND	1 st - 466,069 pupils
Danang	4 th – 4,441,000 VND	6 th – 10,211,000 VND	36 th - 51,029 pupils
Ba Ria – Vung Tau	5 th – 4,413,000 VND	2 nd – 11,953,000 VND	38 th - 49,451 pupils
Haiphong	6 th – 4,375,000 VND	5 th – 10,787,000 VND	9 th - 95,162 pupils
Dong Nai	7 th – 4,328,000 VND	8 th – 9,794,000 VND	5 th - 149,646 pupils
Bac Ninh	8 th – 4,308,000 VND	7 th – 9,916,000 VND	16 th - 79,726 pupils

Taking into account of the income of Vietnamese citizens in the whole country, it is feasible to choose and enter the cities with citizens having higher average salaries. With

higher income, parents are more demanding in higher quality education for their children. Table 4 shows the eight cities with highest average salary and also with the highest quintile 5 citizens' average income in Vietnam. However, the number of targeted group should be looked at as well. When also looking at the number of pupils in these cities, Hanoi, Ho Chi Minh City and Dong Nai were the three cities with high number of pupils of more than 140,000 in 2017. With the high number of pupils and the lack of public schools as mentioned in Vietnam market research part, it is an opportunity for Touhula to enter the market.

In addition, according to Education News, for the academic year 2016-2017, 354 schools were added to the market, of which 277 schools were non-public schools. The five cities with highest rate of non-public schools are Da Nang (64.8%, +0.3% compared to previous year), Binh Duong (63%, +0.15), Ho Chi Minh City (60.8%, +0.8%), Ba Ria – Vung Tau (30.5%, +0.1%) and Hanoi (28.8%, +0.3%) (Huong 2017). Da Nang, Binh Duong and Ho Chi Minh City are, therefore, more competitive in the case of non-public schools.

When taking into account the after preschool stage, Ho Chi Minh City currently seems to be an option as a Finnish-style K-12 school (from primary to high school, from grade 1 to grade 12) is at the implementation stage. The study year 2019-2020 is going to be the first study year of this K-12 school starting first with primary education. This K-12 School's name is VFIS (Vietnam Finland International School) and it is under the operation of Ton Duc Thang University. However, entering Ho Chi Minh City also means competing with the first Finnish preschool currently in the market operated by Quality Training Solution Vietnam with FinlandWay teaching methods. Future Finnish education institutions including high schools will be opening in Hanoi in the future as well in addition to Ho Chi Minh City location. (Vi Vu 2017.)

In conclusion, Hanoi is a recommended city in terms of the less competitive, future possibility development of Finnish institutions, and the fact that no Finnish preschool is in this city yet. Haiphong, a neighborhood city of Hanoi, is also a potential market in terms of the statistics mentioned in Table 4. When considering expansion, Haiphong could be a favorable option. Choosing the location in the city is also important, as Hanoi is the second biggest city and crowded. Finding the location spacious enough is necessary, and more research should be done on this. The position should be reasonable such as being

distant from the motorized road, lowland and polluted area. The school should be designed and built on children spirit to create a close relationship between school and children but should be in harmony with the nearby residential areas. (Nguyen, D. 2016.)

8.4 Marketing strategy recommendation

Building a company's awareness should be done from before launching the product or service in the market. Therefore, Touhula should start the marketing campaign even before launching the export model, especially when the parents of young children have not heard much of Finnish preschool education. To do this, Touhula can take part in international education events in Vietnam or organize events to reach to parents such as a Finnish School Day, a day at Finnish class and so on. In addition, advertising billboards, flyers and brochures about courses and teaching contents can be used to support the promotion.

Digital marketing also plays an important role, especially with social media and websites in all stages of implementation. If Touhula is going to export to the Vietnamese market, the company should create a website in Vietnamese. Social media is an effective channel to share information and content about the school. According to statistics, Vietnam is the seventh highest country with the number of people using Facebook at 58 million. Ho Chi Minh City also is in the top six cities with the highest number of Facebook users at 14 million. (Nguyen 2018.)

When planning on a marketing strategy, Touhula should understand the aspects that parents of young children are looking for. The marketing strategy should be built based on the marketing mix of the four Ps or S.A.V.E., as suggested in the theoretical part. The marketing messages should educate parents regarding Finnish education as well as the Touhula brand, prove the quality and value of the service together with the convenience of access to the target group.

9 CONCLUSION

The research has established an overview of the preschool education and kindergarten industry in Vietnam, describing the current situation, pointing out opportunities and trends together with competition and challenges. The information was collected from secondary data as well as primary sources. Based on the survey results as well as the demand for private schools as mentioned in the Vietnam market research part, it is feasible to decide that Vietnam is a suitable market for Touhula to enter.

However, Touhula should consider its expectation and its resources in combining with the research results in order to make decisions. In case of entering the market, instead of establishing the company immediately, the company should focus on building its image and have a marketing strategy implemented, first to raise awareness of Finnish education and the Finnish school model among parents. As the participants who joined the survey were quite limited in terms of number and in terms of diversity sources, it is recommended to carry out broader researches.

In summary, the results have answered the question given at the beginning of the thesis. In order to do international market research, the PESTEL model was used, together with analyses of additional kindergarten information and educational teaching methods. In the final parts, the author also gave advice to Touhula on matters to take into consideration as well as strategic recommendations on market penetration.

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APPENDICES

Survey in English

Survey for Vietnamese parents and future parents of kids at the age from 1-6 years old regarding interest in Finnish Preschool Education

Company A is a leading private kindergarten organization in Finland providing preschool education service for children at the age from 1 - 6 years old. The company is planning to enter the Vietnam market. We would like to make a market research on whether it is feasible to enter the market and to apply Finnish education solution into Vietnam market.

1. Title

- Mr.
 Mrs.
 Ms.

2. City you are living in:

- Hanoi
 Haiphong
 Another, please specify: _____

3. Age

- 16 – 24 25 – 34 35 – 44 45 – 54

4. What level of education did you finish or are you in?

- High school Vocational education Bachelor degree
 Master degree PhD/Higher degree College degree

5. Average monthly salary of the household:

- 0 – 5 million VND 6 - 10 million VND 11 - 20 million VND
 20 – 30 million VND 31 - 40 million VND 41 - 50 million VND
 More than 50 million VND

6. How many children at the age at 6 and younger do you have?

- Haven't married yet, 0 child
 Married, about to have child
 1 child
 2 children
 More than 2 children

Please answer number 4 if you have children at the age at 6 and younger.

7. Which type of kindergarten, nursery your kid(s) is/are studying at?

- A Public school
 A Private school
 A Citizen-based school

8. When speaking of high quality education, which country comes to your mind first?

9. Which aspects of your children's developments you focus on most? Please mark 3 options with the order number (1-most important -> 3- less important, and leave out the 2 options that you think not so go with your preferences)

- Language: Vietnamese national language
 Languages: Both Vietnamese and another foreign language (If not English please mention what language? _____)
 Physical states
 Adventure of outside world
 Arts and culture
 Others, please specify: _____

10. From which source(s) do you know about Finnish education?

- Social media channels (Facebook, YouTube, Twitter, LinkedIn, etc.)
 People around you (family, relatives, friends, colleagues, neighbors, etc.)
 Media (TV news, newspapers, etc.)
 Others, please specify: _____

The company A's commitment is to provide quality, versatile and stimulate education in a joyful, safe and inspiring environment. They organize the day care centers with 4 different themes: language, exercise, adventure and art and culture. The company A also engages parents in planning and preparing the child's individual early childhood education and care (ECEC) plan.

11. I am interested in having my children studied in such Finnish preschool

- Strongly agree
 Somewhat agree
 Neither agree nor disagree
 Somewhat disagree
 Strongly disagree

Would you specify for your option above?

12. What is the maximum tuition fee are you willing to pay to have your children to study in this Finnish model preschool?

- 2 – 5 million VND 6 - 10 million VND 11 - 20 million VND
 20 – 30 million VND 31 - 40 million VND 41 - 50 million VND
 More than 50 million VND

Exercise daycare centers focus on exercise, which is included in all areas of children's learning, while the children will enjoy the active and healthy lifestyle. Language daycare centers support especially verbally gifted kids with the rich world of languages through various ways from interaction support activities, songs, rhymes, stories and games as well as dual language immersion is introduced here. Adventure daycare centers inspires kids to discover the world in all shapes and sizes without limitation and fear with the support statement of that every child is a treasure. Arts and culture daycare centers inspires children in a cultural and artistic rich environments so that they can express themselves with creative souls.

13. Which of these 4 models you are interested in most?

- Exercise daycare center
- Language daycare center
- Adventure daycare center
- Arts and culture daycare center

14. Do you have any suggestion/recommendation for company A regarding entering the Vietnamese market?

15. Could you leave your contact information for a short possible interview for arising issues? (not obligatory)

Survey in Vietnamese**BẢNG CÂU HỎI KHẢO SÁT GIÁO DỤC MẦM NON VIỆT NAM**

Công ty A là một tổ chức giáo dục mầm non tư dẫn đầu tại Phần Lan, cung cấp dịch vụ giáo dục trước độ tuổi đi học cho trẻ từ 1-6 tuổi. Công ty đang có kế hoạch tìm hiểu và thâm nhập thị trường Việt Nam. Vì vậy, chúng tôi làm bảng khảo sát thị trường này để nhìn nhận khả năng và tiềm năng của thị trường và kiểm tra độ phù hợp khi ứng dụng giải pháp giáo dục mầm non Phần Lan vào Việt Nam. Đối tượng khảo sát là dành cho các bậc phụ huynh (hoặc sẽ là các bậc phụ huynh) của các em ở độ tuổi từ 0-6 tại Việt Nam. Mong quý phụ huynh giành thời gian điền bảng khảo sát theo các câu hỏi sau đây.

1. Giới tính

Nam Nữ

2. Thành phố anh/chị đang sinh sống

Hà Nội

Hải Phòng

Thành phố khác, xin hãy nêu tên: _____

3. Tuổi

16 – 24

25 – 34

35 – 44

45 – 54

4. Trình độ học vấn anh chị đã hoặc đang theo học?

Trung học cơ sở

Trung học phổ thông

Đại học

Thạc sĩ

Tiến sĩ

Cao đẳng

5. Thu nhập trung bình của hộ gia đình trong 1 tháng:

0 – 5 triệu VND

6 - 10 triệu VND

11 - 20 triệu VND

20 – 30 triệu VND

31 – 40 triệu VND

41 - 50 triệu VND

Trên 50 triệu VND

6. Có bao nhiêu trẻ từ độ tuổi 0-6 tuổi anh chị hiện đang có?

Chưa kết hôn, 0 trẻ

Đã kết hôn, chuẩn bị hoặc sẽ có em bé

1 trẻ

2 trẻ

Nhiều hơn 2 trẻ

Xin anh/chị hãy trả lời câu hỏi 7 nếu như anh chị có trẻ từ 0-6 tuổi

7. Loại hình mẫu giáo, mầm non nào con của anh/chị đang theo học hoặc dự định cho theo học?

- 1 trường công lập
- 1 trường tư nhân/quốc tế
- 1 cơ sở do dân lập

8. Khi nói về vấn đề giáo dục mầm non, mẫu giáo tốt, nước nào anh/chị nghĩ đến đầu tiên?

9. Khả năng phát triển nào của trẻ anh/chị quan tâm đến nhất? Xin hãy điền vào ô vuông bên cạnh theo số thứ tự (1 – tôi quan tâm khía cạnh này nhất, 2 – tôi quan tâm khía cạnh này thứ nhì, 3 – tôi quan tâm khía cạnh này thứ 3, 4 – tôi quan tâm khía cạnh này thứ 4, 5- tôi không hoặc ít quan tâm đến khía cạnh này)

- Khả năng phát triển ngôn ngữ: tiếng Việt – ngôn ngữ quốc gia
- Khả năng phát triển ngôn ngữ: Cả tiếng Việt và 1 loại ngôn ngữ nước ngoài (nếu không phải tiếng Anh, xin anh/chị đề cập đó là ngôn ngữ gì? _____)
- Khả năng phát triển thể chất của trẻ: thể dục, thể thao khỏe mạnh
- Khám phá về thế giới xung quanh: cây cỏ, động vật, rừng núi cùng các hoạt động ngoại khóa
- Nghệ thuật (hội họa, âm nhạc, kiến trúc và nền văn hóa)
- 1 khía cạnh khác mà tôi cũng rất quan tâm ngoài 3 lựa chọn trên đó là:

10. Anh/Chị biết đến giáo dục Phần Lan thông qua (những) nguồn nào?

- Các kênh mạng xã hội (Facebook, YouTube, Twitter, LinkedIn, etc.)
- Mọi người xung quanh (gia đình, họ hàng, bạn bè, đồng nghiệp, hàng xóm, ...)
- Các kênh truyền thông (bản tin tivi, báo, ...)
- 1 nguồn khác, đó là: _____

Công ty A hoạt động với cam kết cung cấp dịch vụ giáo dục chất lượng, thoải mái and truyền cảm hứng trẻ phát triển trong 1 môi trường vui vẻ, an toàn và thúc đẩy. Họ tổ chức các trung tâm giáo dục mầm non theo 4 chủ đề: ngôn ngữ; thể thao; khám phá; nghệ thuật và văn hóa. Công ty A cũng kết hợp với từng cha mẹ trong việc lên kế hoạch và chuẩn bị cho trẻ với kế hoạch chăm sóc và giáo dục từng cá nhân trẻ ở độ tuổi mầm non. Xin anh/chị hãy dựa vào thông tin này để trả lời câu hỏi từ 11 đến 14.

11. Anh/chị có hứng thú cho trẻ học trong một cơ sở giáo dục mầm non Phần Lan như vậy

- Hoàn toàn đồng ý
- Đồng ý ở 1 mức độ nào đó
- Trung lập
- Không đồng ý ở 1 mức độ nào đó
- Hoàn toàn không đồng ý

Xin anh/chị hãy giải thích lý do cho sự lựa chọn trên?

12. Số tiền học phí cao nhất mà anh/chị sẵn sàng trả cho con học ở mô hình trường mầm non Phần Lan này là khoảng:

- 2 – 5 triệu VND 6 - 10 triệu VND 11 - 20 triệu VND
 20 – 30 triệu VND 31 - 40 triệu VND 41 - 50 triệu VND
 Trên 50 triệu VND

- Trung tâm chăm sóc và giáo dục thể chất tập trung vào thể dục, thể thao trong tất cả các hoạt động học của trẻ và trẻ sẽ có một lối sống lành mạnh và năng động.
- Trung tâm chăm sóc và giáo dục ngôn ngữ hỗ trợ trẻ đặc biệt là các em có năng khiếu về nói chuyện với một thể giới ngôn ngữ phong phú thông qua cách khác nhau như các hoạt động hỗ trợ tương tác, các bài hát, giai điệu, các câu chuyện và các trò chơi. Trẻ sẽ được học trong môi trường 2 ngôn ngữ.
- Trung tâm chăm sóc và giáo dục khám phá truyền cảm hứng trẻ khám phá thế giới ở mọi hình hài và kích cỡ mà không có giới hạn và sự lo lắng nào.
- Trung tâm chăm sóc và giáo dục văn hóa và nghệ thuật truyền cảm hứng cho trẻ trong một môi trường giàu văn hóa và nghệ thuật để chúng có thể thể hiện bản thân mình với một tâm hồn sáng tạo

13. Mô hình nào trong 4 mô hình dạy và chăm sóc trẻ ở trên anh/chị quan tâm nhất :

- Giáo dục thể chất là trọng tâm
 Giáo dục ngôn ngữ là trọng tâm
 Giáo dục khám phá là trọng tâm
 Giáo dục nghệ thuật và văn hóa là trọng tâm

14. Anh/Chị có gợi ý hoặc lời khuyên nào cho công ty A về vấn đề thâm nhập thị trường Việt Nam?

15. Xin anh/chị để lại thông tin liên lạc cho 1 cuộc phỏng vấn ngắn về các vấn đề này sinh (Không bắt buộc)

Tên: _____

Email: _____

Số điện thoại: _____

Statistics of kindergarten education in different cities in Vietnam

	Pupil	School	Class	Teacher (Pers.)
Ha Noi	466069	1084	14886	34174
Ho Chi Minh city	329065	1208	11292	19482
Nghe An	188342	541	5647	9053
Thanh Hoa	187145	669	6557	10275
Dong Nai	149646	318	4877	7225
Bac Giang	109222	278	3567	5892
Hai Duong	107637	328	3447	6684
Binh Duong	95347	338	2820	4801
Hai Phong	95162	311	3412	6283
Dak Lak	93022	310	3327	5187
Nam Dinh	91693	266	2798	4897
Phu Tho	89738	318	2954	6051
Son La	86976	269	3191	4165
Thai Binh	86136	305	2822	4427
Gia Lai	80873	270	3485	3741
Bac Ninh	79726	168	2589	4139
Ha Tinh	75376	273	2259	3963
Thai Nguyen	72342	229	2125	4447
Vinh Phuc	70138	184	2351	3028
Quang Ninh	68898	216	2570	4759
Hung Yen	67759	187	2291	2983
Quang Nam	63453	260	2330	4160
Lam Dong	61320	228	1898	3606
Ha Giang	60777	217	2608	3664
An Giang	59010	196	1882	2312
Dong Thap	58227	197	1963	3028
Binh Dinh	56906	218	1871	2807
Tien Giang	55918	228	1526	2515
Binh Thuan	55246	193	1722	3364
Long An	54900	224	1798	3440
Quang Binh	52997	182	1754	3409
Khanh Hoa	52260	199	1764	3215
Hoa Binh	52196	227	1848	3791
Tuyen Quang	51962	149	1764	3227
Ninh Binh	51145	152	1478	2956
Da Nang	51029	199	1901	3961
Thua Thien-Hue	50532	207	2030	3326
Ba Ria - Vung Tau	49451	167	1584	2941
Yen Bai	49244	192	1536	2850

	Pupil	School	Class	Teacher (Pers.)
Kien Giang	49196	155	1620	2360
Lao Cai	49190	200	1996	3638
Soc Trang	49146	135	1567	2477
Quang Ngai	47906	214	2045	2819
Binh Phuoc	46659	156	1457	2721
Can Tho	46583	178	1933	2935
Ha Nam	46233	119	1553	2100
Lang Son	45795	231	1720	3295
Dien Bien	45344	176	1812	2428
Ben Tre	44038	178	1287	1998
Vinh Long	38865	128	1294	2196
Tra Vinh	38141	122	1261	1685
Lai Chau	37394	136	1525	2381
Ca Mau	36160	132	1230	1749
Kon Tum	36006	138	1365	1829
Tay Ninh	35926	134	1216	1686
Dak Nong	35283	119	1141	1930
Quang Tri	34513	167	1254	2317
Phu Yen	30520	138	1111	1731
Cao Bang	30209	192	1370	2144
Hau Giang	29569	85	962	1599
Bac Lieu	28412	88	867	1569
Ninh Thuan	23035	92	792	1293
Bac Kan	18833	123	873	1238

Source: General statistics office of Vietnam, 2017

The monthly average income per capita at current prices by income quintile and by Cities and Income quintile in 2016

	General average	Quintile 1	Quintile 2	Quintile 3	Quintile 4	Quintile 5
Ho Chi Minh city	5109	1829	2996	3775	4978	11985
Binh Duong	5005	1671	2933	3739	4919	11819
Ha Noi	4875	1390	2622	3576	4857	11941
Da Nang	4441	1595	2440	3267	4730	10211
Ba Ria - Vung Tau	4413	1373	2157	2816	3786	11953
Hai Phong	4375	1380	2443	3189	4120	10787
Dong Nai	4328	1581	2634	3344	4297	9794
Bac Ninh	4308	1505	2530	3282	4349	9916
Quang Ninh	3747	1088	2120	2933	3819	8826
Tay Ninh	3391	1282	1979	2539	3249	7946
Can Tho	3365	1176	1903	2500	3382	7917
Long An	3242	1075	1926	2575	3462	7208
Hai Duong	3169	1105	1955	2614	3441	6751
Binh Phuoc	3148	1034	1853	2481	3316	7093
Tien Giang	3139	1028	1819	2447	3269	7144
Kien Giang	3016	866	1439	2067	2973	7767
Nam Dinh	3014	1081	1832	2393	3071	6707
Thai Nguyen	3005	890	1682	2368	3267	6855
Lam Dong	2979	840	1430	2238	3175	7222
Ninh Binh	2914	964	1660	2260	3079	6662
Hung Yen	2895	1100	1792	2346	3074	6207
An Giang	2892	936	1514	2078	2862	7083
Khanh Hoa	2891	921	1680	2217	2939	6725
Vinh Phuc	2860	957	1730	2318	3067	6280
Ha Nam	2826	937	1740	2458	3226	5810
Thai Binh	2812	995	1684	2306	3067	6024
Bac Giang	2778	881	1626	2372	3242	5796
Binh Thuan	2714	1071	1664	2158	2846	5853
Dong Thap	2691	827	1389	1946	2824	6479
Hau Giang	2611	831	1420	1909	2675	6247
Binh Dinh	2605	865	1489	2086	2863	5743
Thua Thien-Hue	2604	837	1563	2131	2922	5599
Soc Trang	2548	821	1348	1778	2453	6375
Ben Tre	2450	770	1342	1933	2676	5569
Vinh Long	2378	827	1391	1875	2642	5171

	General average	Quintile 1	Quintile 2	Quintile 3	Quintile 4	Quintile 5
Ca Mau	2372	718	1194	1660	2380	5923
Phu Yen	2358	788	1321	1883	2577	5247
Ninh Thuan	2340	673	1227	1644	2336	5854
Dak Nong	2335	606	1069	1568	2511	5990
Dak Lak	2329	639	1094	1653	2606	5667
Bac Lieu	2319	708	1320	1888	2600	5088
Quang Binh	2256	636	1189	1785	2598	5089
Tra Vinh	2220	622	1185	1663	2403	5245
Thanh Hoa	2212	713	1137	1748	2644	4823
Quang Nam	2187	696	1179	1782	2604	4706
Quang Ngai	2153	684	1211	1784	2496	4625
Ha Tinh	2078	654	1085	1613	2382	4668
Quang Tri	2044	616	1036	1609	2474	4498
Kon Tum	1951	633	751	1227	2497	4658
Gia Lai	1950	535	845	1327	2279	4790
Hoa Binh	1925	574	991	1524	2254	4301
Lao Cai	1856	569	784	1204	2140	4604
Nghe An	1820	492	834	1410	2182	4202
Yen Bai	1805	565	837	1228	1931	4481
Tuyen Quang	1759	586	882	1306	1962	4071
Lang Son	1684	544	825	1191	1952	3924
Cao Bang	1643	474	633	893	1756	4472
Bac Kan	1401	414	711	940	1651	3305
Ha Giang	1324	549	655	799	1199	3430
Lai Chau	1312	462	640	813	1229	3424
Son La	1288	447	669	815	1261	3254
Dien Bien	1221	464	583	701	1013	3355

Source: General statistics office of Vietnam, 2016