English Language Providers (ELPs) Overview

1. Student from around 37 English language providers responded to the New Zealand English Language Barometer in 2012; this represents 44% of the total number of ELPs who were registered to teach international students. Students from 14 PTEs (who offered English language courses in addition to other courses) also responded to the English Language Barometer.

2. Responses were received from 1,478 English Language students. Those from English language providers (1213) represented 11% of the total number of ELP students studying in New Zealand in semester 2 in 2012*.

Response

3. The largest proportion of respondents were studying General English (59%) this was followed by those on IELTS preparation courses (17%). The remaining respondents were studying Cambridge preparation, English for academic purposes and English plus another subject/hobby although this accounted for the smallest proportion (2%). This is very similar to the data collected from the 2008 sample of English NZ instituions, with a slight increase in the number of students studying IELTS preparation (+6%).

4. Three nationalities made up over 50% of the sample, these were: China (22%), Japan (19%) and South Korea (13%). The global benchmark group differed slightly – China remained the number one nationality however the global sample had less Japanese and South Koreans, but more students from Saudi Arabia. In comparison to the 2008 sample, there has been a shift in the ranking position with South Korea and Japan representing the largest proportion of the sample in 2008.

5. 87% of the New Zealand sample were studying English courses lasting 9 weeks or more, which is broadly similar to the sample in 2008.

6. The majority of the sample were funded either through their family (58%) or own funds (40%).

Recommendation

7. 80% of international students would recommend their institution to others thinking of applying. This is 1% above the global benchmark groups average and a 4% increase since 2008. Large variations exist between institutions with a reported range between 48% and 97%, although the majority scored above 80%.

Pre-Arrival and the Student Decision-Making Process

8. For students looking to study English language abroad, Australia (36%), Canada (34%) and USA (33%) remain key competitors. However, at the point of application 87% of the sample population applied
only to New Zealand, with only a minority applying also to Australia (3%), USA (3%) and Canada (3%). This suggests that final choice of study destination is – in the majority of cases - made prior to the application stage. This is consistent across all New Zealand sector results. This has also changed slightly since 2008 with less students reporting Australia (-17%) and Canada (-13%) as alternative study destinations, this drop has been replaced by interest in new emerging markets.

9. Teaching quality (97%), personal safety (95%) and cost (living and study - 92%) were the top factors for students in considering their study destination. Other important factors included institution reputation (90%) and social life (89%). This is similar to decision-making factors in 2008, where students selected quality of teaching, reputation of school, and cost of education as the three most important factors. The least important factors were proximity to my home country (24%), friends in this country (44%), and long-term employment (55%).

10. Agents play a key role in the decision-making process for students, with more than half of the sample applying via an education agent, and 61% identifying the agent as the key influencer in choice of institution. This is 11% higher than the global benchmark group, and has increased by 22% since 2008 suggesting that the agent is becoming more influential in the choice of institution. At the same time, word of mouth promotion remains critical to influencing choice of institution with the three main influencers being agents, friends (25%) and alumni (24%) this is in comparison to other forms of communication which appear to be less influential including the institution website and the prospectus.

11. Of those who used an agent, 88% stated that the service was either good or very good. This is consistent with the results from students across the other sectors in New Zealand. 75% of students were also willing to recommend their agent to other students thinking of applying.

**Future Plans**

12. Almost a third of the sample intend to stay in New Zealand for employment or further study, with a further 12% stating that they intend to travel or take time off for more than three months. The largest proportion of the sample were still undecided (26%).

**Arrival Experience**

13. 89% of students indicated that they were either satisfied or very satisfied with their overall arrival experience; this is equal to the satisfaction level shown in the global benchmark group. Very little variation exists between student nationality groups with all nationalities showing an overall satisfaction of 80% or above.

14. When broken down into individual elements, areas where students identified exceptionally high satisfaction levels were: registration (95%), meeting staff (94%), formal welcome (92%), school/centre welcome (92%). All of these elements were either equal to or above the global benchmark group’s average.
Learning Experience

15. 88% of respondents stated that they were either satisfied or very satisfied with their overall learning experience. This is 2% below the global benchmark group’s average score.

16. Areas showing the highest satisfaction were friendly staff (97%), teachers’ English ability (95%), good teachers (93%), assessment (91%) and learning support (91%). When compared to the global benchmark group - friendly staff, learning support and classroom quality were all at least 2% above the average score.

17. Technology appears to be the main issue within the learning experience with several elements related to technology receiving low satisfaction scores. These include: the online library (74%), the use of learning technology in the classroom (76%) and the virtual learning environment (79%). Technology appears to be a continuing issue with low satisfaction reported in 2008 (75%), it is also the only area showing a significant difference between the global benchmark group (-9%). Variation does exist for each of these elements by institution and by nationality.

Living Experience

18. Overall, 88% of respondents stated that they were satisfied with their living experience.

19. Areas showing the highest satisfaction include: good place to be (92%), ability to make friends from other countries (91%) and the campus environment (91%) with each of these elements positioned relatively close to the global mean score.

20. Cost is an issue for many students, with all elements related to cost showing low satisfaction scores. This includes: opportunities to earn money (45%) living cost (57%) and accommodation cost (62%). These figures appear to be lower than those reported in other sectors and have all witnessed substantial decreases since 2008. This may be attributed to a number of factors including the strong New Zealand dollar and visa regulations for English language students in respect of work.

21. Areas showing the lowest satisfaction were the weather (60%), transport links (61%), making host friends (64%) and internet access (65%). Each of these issues were below the global benchmark group average, with internet access displaying the highest differentiation (-17%). Internet access is a continuing problem with a 3% drop reported since 2008; however it is also an area which attracts low satisfaction across all sectors in New Zealand.

22. The data showed no significant issues with perceptions on safety with the majority of respondents stating that they felt fairly safe or safe in their surroundings. A small percentage of respondents reported that they did not feel safe on public transport (11%) or in public spaces (13%). This is
consistent with the safety picture reported in other sectors with no significant difference reported by region.

23. When asked how many close friends students had with various groups of people, the survey showed that international students had made one or more close friends with people from their own country (91%) compared to 90% for people from other countries and 58% for New Zealanders. This is not surprising given the nature of an English teaching program where opportunities to mix with local native English speaking students are limited.

24. The above pattern continued when asked how much social and study time international students spent with the key groups of people with New Zealanders showing the lowest scores.

Support Experience

25. 91% of respondents reported that they were satisfied with the overall support that they had received from their institution with no institution receiving below 80% satisfaction.

26. Pre-arrival advice (89%) and visa application support (88%) received the highest satisfaction scores; however the sample size was relatively low. Organised social events (87%) and accommodation placement service (84%) also received high satisfaction scores with a statistically significant sample in comparison to the global benchmark group. Both of these elements also scored at least 4% above the global benchmark group.

27. Part-time work advice (67%) and future career advice (76%) attracted the lowest satisfaction scores, though representing a small proportion of the sample and scoring 5% and 3% above the global benchmark group. Support questions were only asked of those students who used the service and, given the potential for a large proportion of the sample who would not qualify for a work visa; this may explain the lack of satisfaction with part-time work advice. Large variations exist for both of these elements between nationalities with China who has the largest sample displaying relatively high satisfaction (83% and 80% respectively) and Columbian, Vietnamese and South Koreans showing some of the lowest satisfaction scores especially for part-time work advice.

* Total PTE student numbers in Semester 2 2012 have been estimated based on Semester 1 numbers taken from the Education Export Levy data returns 2012. Semester 2 returns are not due until July 2012.
% response rate of the sample population is unavailable due to lack of data being returned by participating institutions.