

New Zealand ELP Sector

English Language Barometer 2014

Summary report

Overview

The 2014 English Language Barometer was commissioned by Education New Zealand to investigate the decision making, expectations, perceptions and experiences of international students at English language providers in New Zealand. As well as providing insight into English language students in New Zealand, it incorporates a global benchmark (comprising results from over 14,000 English language students in various countries) to provide an indication of how New Zealand compares to other English language destination countries. The study follows previous Barometers run in 2008 and 2012.

This report provides a high-level summary of results for the sector, highlighting areas where results for New Zealand differ notably from the global benchmark and where there are particularly noteworthy differences since the last survey in 2012. Additional, more detailed analysis is available in the PowerPoint-format report and data files provided alongside this report.

Methodology and sample profile

1. The 2014 New Zealand English Language Barometer was conducted online between 25 August and 13 October 2014.
2. 2,103 English language students participated in the survey (up from 1,478 in 2012). These students were studying at 48 institutions – 24 specialist English language providers; 13 English language schools/centres at universities and ITPs; and 11 PTEs that offered English language courses in addition to other courses.
3. Three nationalities made up 50% of the sample. These were: China (22%), Japan (16%) and South Korea (12%). This is a lower proportion of Chinese students than the global benchmark group (33%) and a higher proportion of Japanese (8%) and South Koreans (6%), with the global benchmark comprising a wider group of nationalities.
4. The largest proportion of respondents were studying General English (61%). This was followed by those doing English for Academic Purposes (17%), those on IELTS preparation courses (10%) and those preparing for Cambridge Exams (8%).
5. The vast majority (85%) of the New Zealand sample were studying English courses lasting nine weeks or more. Students were at varying stages throughout their studies.
6. Students were most likely to have been funding their studies via their family (51%) or own funds (50%).
7. The 2012 sample was similar to the 2014 sample on all of the above characteristics, with a slightly higher proportion of students on IELTS preparation courses (17%) and a slightly lower proportion doing English for Academic purposes (9%).

Pre-arrival and the student decision-making process

8. Students were most likely to have chosen to study an English language course to prepare them for further study (31%) or to improve their future employment opportunities (31%). Around one in ten students wanted to experience living in a different country (12%), needed better English for their current employment (11%) or had a personal interest in learning a new language (10%).
9. New Zealand was the first choice for international language study for the majority (71%) of students surveyed. While around a fifth (22%) didn't consider studying in any country other than New Zealand, around a third also considered Australia (32%), USA (32%) and Canada (30%) and a quarter considered the UK.
10. The vast majority (90%) of the English language students surveyed in New Zealand only applied to study in New Zealand, suggesting that final choice of study destination is – in the majority of cases - made prior to the application stage.
11. The top factors for New Zealand English language students when deciding on where to study were teaching quality (97%) and personal safety (95%). These were followed by social life (89%), institution reputation (89%), cost of study (88%), cost of living (88%) and tourism (86%). While these top factors were largely in line with the global benchmark, English language students in New Zealand were considerably less likely than the global average to have seen opportunities for further study in this country (-12%), opportunities for full-time work in this country following their studies (-8%), friends in this country (-8%) and long-term employment or permanent residence in this country (-7%) as important.
12. Agents continue to play a key role in the decision-making process for students, with over half (57%) of the sample applying via an education agent and agents being the most commonly cited influence in helping students choose their institution. Friends (24%) and alumni (23%) are also key influences, demonstrating the importance of word of mouth promotion. They were cited above other sources such as the institution website (16%), parents (14%), the Education New Zealand website (10%) and prospectuses (9%).
13. Of those who applied via an agent or college representative office overseas, 92% rated the service as either good or very good. 78% would recommend their agent/overseas representative to other students thinking of applying.
14. Satisfaction with the visa application process was also generally high with 86% of students satisfied. Students were most likely to have been satisfied with the biometric information process (89%), support from their college (89%) and the immigration service on arrival at the border (88%). They were least likely to have been satisfied with the time taken to process their visa (77%).
15. The majority of students were satisfied with the accuracy of pre-arrival advice and information from their institution (91%), Immigration New Zealand (88%) and education agents (86%).

16. English language students in New Zealand were more likely than the global benchmark average to have been satisfied with the time taken between applying and receiving an offer from their language school (89% v 84%).

Overall satisfaction and propensity to recommend their school and New Zealand

17. Overall satisfaction with students' language school/centre experience is high; 89% of English language students surveyed were satisfied, 1% above the global benchmark and 1% higher than the last survey in 2012. Overall satisfaction varies by institution, with scores ranging from 64% to 98%¹. Nationalities with highest levels of satisfaction were Vietnamese (97%), Chilean (95%), New Caledonian and students from the Russian Federation (both 94%). Those with lowest levels of satisfaction were students from Colombia (80%), Brazil, France, Saudi Arabia and Switzerland (all 83%)².

18. 85% of students would recommend their institution to others thinking of applying there. This is 3% above the global benchmark group average and a 5% increase since 2012. Large variations exist between institutions, with a reported range³ between 55% and 100% although the majority scored above 80%. Nationalities most likely to recommend their institution were Russian (95%), French (95%), Swiss (94%) and Chilean (94%); this is interesting considering the relatively low satisfaction amongst French and Swiss students as noted above. Those least likely to recommend their institution were Taiwanese (78%), South Korean (79%) and Saudi Arabian (80%)⁴.

19. 89% of students would recommend New Zealand to others thinking of applying for a similar course. 100% of Chilean and French students surveyed would recommend New Zealand, along with 97% of Germans and Swiss, 96% of Thais and 95% of students from the Russian Federation. Nationalities least likely to recommend New Zealand were Brazilians (82%), Japanese and South Koreans (both 84%)⁵.

20. Reflections on the study experience in New Zealand were generally positive:

- 89% of students agreed they had made progress in learning English since beginning their course of study
- 84% agreed that they feel their English language course has been worth the investment of time
- 82% agreed that studying in New Zealand has been better than they expected
- 80% agreed that their language school/centre experience has lived up to their expectations
- 74% agreed that they feel their English language course offers good value for money.

21. It should be noted, however, that almost a third of students (29%) indicated that they feel isolated from their English language school/centre community.

¹ Amongst institutions with at least 15 respondents.

² Analysis based on nationalities with at least 15 respondents. Please note that the base sizes for Chile (21) and New Caledonia (16) were relatively low so these figures should be treated with caution.

³ Amongst institutions with at least 15 respondents.

⁴ Analysis based on nationalities with at least 15 respondents. Please note that the base sizes for Chile (16) and France (22) were relatively low so these figures should be treated with caution.

⁵ Analysis based on nationalities with at least 15 respondents. Please note that base sizes for Chile (16) and France (22) were relatively low so these figures should be treated with caution.

Arrival experience

22. 90% of students were satisfied with their overall arrival experience; this is equal to the satisfaction level shown in the global benchmark group.
23. Satisfaction with the more detailed aspects of the arrival experience was also generally high. Areas of the arrival that students were most satisfied with were registration and meeting staff (both 94%). Other elements of the arrival with particularly high satisfaction were the welcome received on arrival at the school (93%), the homestay welcome⁶ (92%), the formal welcome (92%), the school orientation (91%), and the first night (91%). Lowest satisfaction (85%) was with setting up a bank account.
24. Areas of the arrival experience where New Zealand institutions performed most strongly against the global benchmark were the welcome/pick-up (+7%), the first night (+5%) and assistance obtaining health insurance (+4%). There were no areas where satisfaction with New Zealand institutions was notably below the global benchmark.
25. Satisfaction has increased very slightly or stayed constant on almost all of the arrival factors since the last survey in 2012. The exception is setting up a bank account where satisfaction has dropped slightly (-3%).

Learning experience

26. 88% of students were satisfied with their overall learning experience, again equal to the global benchmark group's average score.
27. Again, satisfaction with many of the more detailed aspects of the learning experience was high. Students were most likely to be satisfied with staff/teachers being friendly and approachable (96%), teachers they can understand (96%), the teaching ability of teachers (95%), getting time from teachers/personal support when they needed it (94%), assessment (92%) and performance feedback (92%).
28. There are, however, some areas of lower satisfaction, several of which relate to technology: online library facilities (80%), technology (computers, networking, etc) (80%) and the virtual learning environment (82%) along with extra language support (82%) and non-classroom activities (83%).
29. While students are comparatively less satisfied with these technology-related factors, satisfaction has increased since the last survey in 2012. Satisfaction with the online library has increased 6%, technology has increased 4% and virtual learning 3%. Satisfaction has also increased with opportunities to practice English language skills (+4%), learning resources (+3%) and learning support (+3%).
30. In spite of these gains, however, New Zealand does still fall below the global benchmark on the technology-related elements of the learning experience: -6% on virtual learning and -8% on both

⁶ Students who live with a host family/in a homestay.

technology (computers, networking, etc) and on online library. It's also 5% behind the benchmark on the physical library.

Living experience

31. In line with the global benchmark, 89% of students were satisfied with their living experience overall. There is considerable variation, however, in scores for the individual elements that make up the living experience.
32. Elements students were most satisfied with include feeling safe and secure (94%), the surroundings outside the language school (94%), making friends from other countries (92%) and the campus environment (92%).
33. As in 2012, cost is clearly an issue for many students, with all elements related to cost showing low satisfaction scores: living cost (56%), availability of financial support (59%), the opportunity to earn money while studying (60%) and the cost of accommodation (64%). Students were also less likely to be satisfied with the weather (63%), transport links (70%), and the ability to make friends from New Zealand (71%).
34. Low satisfaction with cost-related factors does not appear to be New Zealand-specific. New Zealand scored similarly to the global benchmark on the cost of living (+1%), opportunities to earn money while studying (+2%), and the availability of financial support (-2%). And in fact students in New Zealand were more satisfied than the global benchmark with the cost of accommodation (+6%). English language students in New Zealand, however, were considerably less satisfied with the weather (-12%) and transport links (-9%) than the global benchmark.
35. Positively, students in 2014 were generally as satisfied, if not more so, with the living experience in New Zealand than students in 2012. In particular, satisfaction levels had increased with the ability to earn money while studying (+14%), internet access at their accommodation (+10%), transport links (+9%), making friends from New Zealand (+7%) and safety (+5%).
36. While the vast majority of English language students clearly feel safe and secure in New Zealand, there is a small proportion who report feeling unsafe on public transport (8%) or in public spaces (8%).

Support experience

37. Satisfaction with support overall is high, with 93% of students satisfied with support services. However, scores for the more detailed elements that make up the support experience tend to start slightly lower than for the other parts of the student experience. Students were most satisfied with visa application support (90%), social organisation (87%) and pre-arrival advice from their school (87%).
38. Support elements with the lowest levels of satisfaction were advice and guidance on finding part-time work in New Zealand (73%) and advice on future employment/careers (80%). Satisfaction with both of

these elements had increased since 2012, however, with advice on part-time work up 5% and future career advice up 3%.

39. There were few notable differences from the global benchmark, but English language students in New Zealand were slightly more likely to be satisfied with advice on finding medical care or counselling services and the accommodation placement service (both +3%).

Future plans

40. A third of the sample intend to stay in New Zealand for employment (10%) or further study (23%) after their current programme of 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 (23%).

Concluding remarks

41. As this short summary shows, there are generally high levels of satisfaction amongst international students studying English in New Zealand and most students would recommend their institution and New Zealand as a study destination. Students in 2014 were generally as satisfied, if not more so, than students in 2012 and satisfaction scores for New Zealand are on par with or slightly above the global benchmark on many aspects of the student experience.
42. Consideration should be given, however, to the relatively small proportion of English language students who are not satisfied with their experience. Even with 89% of students satisfied overall, that still leaves one in ten students who are not satisfied; and a similar proportion who would not recommend their institution or New Zealand to other students. There are also particular areas of the student experience where students are considerably less satisfied and where improvements could be made. One clear example is around technology-related elements of the learning experience; others are cost-related factors and transport links.
43. While some changes may be possible at an institutional level and others may require higher level attention, taking a systematic approach to try and further investigate and address areas where students are less satisfied can only help to build New Zealand's reputation and appeal as an English language study destination.

Accompanying notes

Satisfaction questions in the English Language Barometer were asked using a four point scale: Very satisfied; Satisfied; Dissatisfied; Very dissatisfied. This report uses net satisfaction based on the percentage of respondents who were 'very satisfied' or 'satisfied'.