

New Zealand PTE Sector

International Student Barometer 2014

Summary report

Overview

The 2014 private training establishment (PTE) International Student Barometer (ISB) was commissioned by Education New Zealand to investigate the decision making, expectations, perceptions and experiences of international students at PTEs in New Zealand. As well as providing insight into international students at New Zealand PTEs, it incorporates a global benchmark (comprising results from over 13,000 providers in various countries) to provide an indication of how New Zealand compares to other study destinations. The study follows a previous ISB run in the PTE sector in 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 PTE ISB was conducted online between 25 August and 13 October 2014.
2. 2,071 international PTE students participated in the survey (up from 1,454 in 2012). These students were studying at 31 providers (five of which were based in multiple locations in New Zealand).
3. As in 2012, two nationality groups dominated the sample: Indian (42%) and Chinese (20%). While the proportion of Chinese students in the New Zealand sample was similar to that in the global benchmark group (23%), the proportion of Indian students is much higher. Other notable nationalities were Filipino (6%), Nepalese, Fijian and South Korean (all 4%).
4. Students were most likely to have been studying at Certificate/Diploma, Level 5 (30%), Certificate/Diploma, Level 6 (17%) and Diploma, Level 7 (25%). Like 2012, the largest proportion of the sample was studying Business, Finance, Property Services and Administration (26%), followed by Computing, Information Technology and Information Systems (17%) and Tourism, Hospitality and Event Management (15%)¹.
5. Students were most likely to have been receiving funding from their family (68%) or using their own funds (31%). Around a fifth were working part-time to fund their studies (22%) or using a loan (17%).
6. Almost a fifth of the sample (17%) were studying or working in New Zealand before beginning their current programme of study.

¹ Please note that any PTE students who indicated that their main area of study was English language were directed to the English Language Barometer, the results of which are provided in a separate report.

Pre-arrival and the student decision-making process²

7. Views on whether it is the country or the provider that is more important in the decision of where to study were split with around half (51%) of students feeling that it was the country and 42% feeling it was the provider. New Zealand was the first choice country for the majority (80%) of students. While almost a fifth (17%) didn't consider studying in any country other than New Zealand, almost half (45%) considered Australia, over a third considered the USA (36%) and Canada (34%) and a fifth (19%) considered the UK.
8. Despite this, however, the majority (82%) of the PTE 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.
9. Teaching quality, personal safety, institution reputation and qualification reputation (all 96%) were the top factors for students when deciding where to study. These were followed closely by quality research (95%), the cost of study, cost of living and earning potential (all 94%). These results followed a similar pattern to the global benchmark group; however students in New Zealand seem more likely than the global average to consider many factors as important, possibly indicating higher expectations amongst this group. Of particular note, New Zealand students were more likely than the global average to consider work-related factors as important; 92% considered opportunities for full-time work in this country following their studies as important (12% above the global average), 92% considered opportunities to work while studying as important (10% above the global average) and 90% considered opportunities for long-term employment or permanent residence in this country as important (12% above the global average).
10. Agents continue to play a key role in the decision-making process for students, with almost two-thirds (63%) of the sample applying via an education agent; this was up from 56% in 2012. Agents were the most commonly cited influence in helping students choose their institution (64%), followed by friends (28%), the university website (27%), parents (20%) and the Education New Zealand website (19%).
11. Of those who applied via an agent or college representative office overseas, 88% rated the service as either good or very good. Students were most likely to feel that the agent provided helpful services for their visa application (92%), was knowledgeable about the institute/college application process (88%) and was not pushy or forceful with them during the application/enrolment process (88%). Students were less likely to feel that the agent reduced their overall costs (63%), described the institute/college accurately (82%) and provided helpful pre-departure orientation services (82%).
12. Satisfaction with the visa application process was also generally high with at least 90% of students satisfied with the biometric information process, the immigration service on arrival at the border and support from their institution/college with their visa application process. Students were slightly less satisfied with the time taken to process their visa (83%) and service levels from visa office staff in their home country (85%).

² Questions in this section were just asked of students in their first year of study so that the experience was still relatively recent.

Overall satisfaction and propensity to recommend their provider

13. Overall satisfaction with students' experience at their provider is high; 88% of PTE 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 73% to 100%³. It also varies considerably by nationality with the highest levels of satisfaction found amongst Canadian and British students (both 100%) followed by Thai (93%) and Sri Lankan (92%) students, and the lowest satisfaction levels found amongst students from South Korea and Brazil (both 71%) and the Russian Federation (72%)⁴.
14. Three-quarters (76%) of students would recommend their institution to others thinking of applying there, the same proportion as in 2012. This is slightly (2%) below the global benchmark group average. Large variations exist between institutions, with a reported range⁵ between 44% and 96%. Nationalities most likely to recommend their institution were, again, Canadian and British (both 93%) and Fijian (86%) students. Those least likely to recommend their institution were Nepalese (60%), South Korean (64%) and Bangladeshi (68%)⁶.

Arrival experience⁷

15. 93% of students were satisfied with their overall arrival experience; this is slightly above the satisfaction level shown in the global benchmark group (90%).
16. 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 the provider accounts/finance department (97%), and registration (96%). Other elements of the arrival with particularly high satisfaction were making friends from students' own country (94%), assistance to obtain health insurance (94%) and meeting academic staff (93%). Lowest satisfaction was with social activities (83%), making friends from New Zealand (83%) and local orientation (85%).
17. New Zealand providers perform strongly on these more detailed elements of the arrival experience, with students in New Zealand at least as satisfied, if not more so, than the global average on most. In particular, New Zealand PTE students were more likely than the global average to be satisfied with registration (+5%), health insurance (+5%), the welcome/pick-up (+5%) and the finance office (+4%). Also, despite relatively lower levels of satisfaction, New Zealand students were more satisfied than the global average with making friends from the host country, i.e. New Zealand (+4%).
18. There have been some slight changes in satisfaction with elements of the arrival experience since the last survey in 2012, with satisfaction increasing with the welcome/pick-up, internet access at students'

³ Amongst institutions with at least 15 respondents.

⁴ Analysis based on nationalities with at least 15 respondents. Please note that base sizes for Canada (15), Thailand (15), Brazil (17) and the Russian Federation (18) were relatively low so these figures should be treated with caution.

⁵ Amongst institutions with at least 15 respondents.

⁶ Analysis based on nationalities with at least 15 respondents. Please note that the base size for Canada is just 15 so this figure should be treated with caution.

⁷ Questions in this section were just asked of students in their first year of study so that the experience was still relatively recent.

accommodation and the provider accounts/finance department (all +3%). Satisfaction has dropped slightly with local orientation (-5%) and making friends from New Zealand and other countries (both -3%).

Learning experience

19. 90% of students were satisfied with their overall learning experience, slightly higher (+2%) than the global benchmark group's average score.
20. Again, satisfaction with many of the more detailed aspects of the learning experience was high, with at least 90% of students satisfied with 14 out of 23 elements. Students were most likely to be satisfied with academic staff whose English they can understand (95%) and, for postgraduate students, guidance in topic selection (94%). Other elements of the arrival with particularly high satisfaction were assessment, help to improve English language skills if applicable, the teaching ability of teachers, getting time with academic staff/personal learning support and the subject area expertise of teachers (all 93%).
21. Satisfaction with physical library facilities was relatively low (76%), however, as was satisfaction with online library facilities (82%) and learning technology (82%). Students were also less likely to be satisfied with advice and guidance on long-term job opportunities and careers from academic staff (80%) and opportunities for work experience/work placements as part of their studies (81%). As illustrated above, work-related factors were particularly important to students at New Zealand PTEs when choosing their study destination, so this could be an area for focusing attention.
22. There has, however, been an increase in satisfaction with some of these work-related elements of the learning experience since 2012 with satisfaction with work experience increasing 7%, careers advice up 4% and learning that will help students get a good job up 3%. There have been no particularly notable decreases in satisfaction since 2012.
23. New Zealand students were at least as satisfied, if not slightly more so, than the global average on many of the elements of the learning experience. The main exceptions to this where students in New Zealand are less satisfied than average were with physical library facilities (-7%), online library facilities (-4%) and learning technology (-4%).

Living experience

24. 90% of students were satisfied with their overall living experience, again slightly higher (+2%) than the global benchmark group's average score. Looking at the more detailed aspects of the living experience, however, there are fewer elements with very high (90%+) satisfaction compared to the arrival, learning and support experience.
25. Students were most likely to be satisfied with making friends from their home country (93%), the surroundings outside the provider (91%), the provider's eco-friendly attitude (91%), feeling safe and secure (90%) and making friends from other countries (90%).

26. As in 2012, cost is clearly an issue for many students, with all elements related to cost showing low satisfaction scores: the cost of accommodation (64%), living cost (66%), the opportunity to earn money while studying (67%) and the availability of financial support (73%). Satisfaction with transport links was also low (78%).
27. The opportunity to earn money while studying is an area where students in New Zealand are significantly less satisfied than the global benchmark average (-7%). This may link back to expectations and is an area for further investigation. Students are also less likely to be satisfied with transport links (-6%), campus buildings (-4%) and the campus environment (-4%). On the flip side, they are more likely to be satisfied with making friends in their host country, i.e. New Zealand, than the global average (+5%).
28. Satisfaction levels have increased most since 2012 with internet access in students' accommodation (+4%) and have fallen most with the availability of financial support (-4%).

Support experience

29. 89% of students were satisfied with support services overall, similar to the global benchmark of 88%.
30. Satisfaction with the majority of support services amongst those who used them is high - over 90%. Students were most likely to be satisfied with the counselling service (95%), the accounts/finance department (95%), faith provision (94%), the international office (94%) and the student advisory service (94%).
31. Like 2012, the one real exception is satisfaction with the careers service (79%). Although satisfaction with the careers service has increased 4% since 2012 - along with faith provision (+5%) and disability support (+6%) – New Zealand satisfaction levels are still 8% below the global average. With the importance of employment to international students at New Zealand PTEs, this is an area for focus alongside the other previously mentioned work-related elements of the student experience.

Future plans

32. Over half of the PTE students' future plans involve staying in New Zealand after their current programme of study. Over a third (35%) intend to stay in New Zealand for employment – either short term (8%), long term (16%) or migration/permanent residence (11%). A fifth (20%) intend to stay in New Zealand for further study, either at the same provider (11%) or a different one (8%). Just over a quarter (26%) of students are undecided what they will do following their study.

Concluding remarks

33. As this short summary shows, there are generally relatively high levels of satisfaction amongst international students studying at PTEs in New Zealand and satisfaction scores for New Zealand are on par with or slightly above the global benchmark on many aspects of the student experience. Around three-quarters of students would recommend their institution to other students thinking of applying there.
34. While this can be seen as a relatively positive result, it does still leave around a quarter of students who would not recommend their institution. Understanding the reasons behind this and working to address them is important for both individual institutions and at sector level.
35. Particular areas that may warrant attention include costs and, potentially linked to this, work-related factors. When choosing a study destination, international students studying at PTEs in New Zealand appear to place considerably more importance on opportunities to work both during and after study than their counterparts studying abroad in other countries. However, despite satisfaction with a number of work-related factors having increased since 2012, it seems that New Zealand is not always delivering on these expectations. Continuing to focus on aspects such as work experience, opportunities to earn money while studying and careers guidance/services will help in meeting students' expectations and in developing the reputation of both individual institutions and New Zealand as a whole for employment.

Accompanying notes

Satisfaction questions in the International Student 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'.