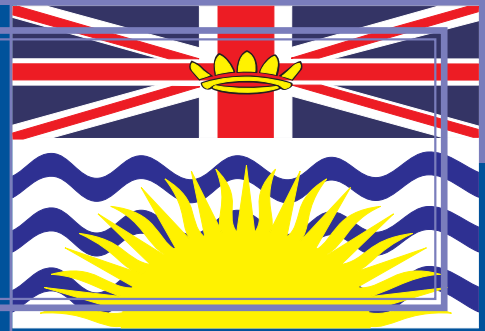


**THE INTERNATIONAL
STUDENT IN
BRITISH COLUMBIA**



**CHOICE FACTORS, PERCEPTIONS AND
INFLUENCES OF INTERNATIONAL
STUDENTS WHO ARE STUDYING
IN BRITISH COLUMBIA**

by JWT Education



BCCIE

THE INTERNATIONAL STUDENT IN BRITISH COLUMBIA

**Choice Factors, Perceptions And Influences
Of International Students Who
Are Studying in British Columbia**

Produced By:
JWT Education
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Introduction

The BC Centre for International Education (BCCIE), funded by the Provincial Government, coordinates international marketing, pursues contracts for international projects and sponsors professional development activities. BCCIE is comprised of the province's 28 government accredited and funded colleges, university-colleges, institutes and universities, which have extensive experience in servicing clients around the world.

This benchmark study examines the choice factors and influences of international students who have elected to study in British Columbia. The study involved completion of a written survey by international students at BCCIE member institutions in British Columbia.

This study primarily examines the attitudes and perceptions of international students from two major source regions – Asian/Pacific students and European/American students. A very small proportion of students from other source countries (3%) have also been included. Over 550 students studying throughout British Columbia participated in the study and their insights provide a unique, comparative perspective of what drives the decisions of international students who have elected to study in British Columbia and how they eventually arrived at their choice of country, province, institution and course.

The study explores numerous issues including when decisions are made, key selection criteria, standards of education and influencing factors. The results are compared between each of the source country groupings.

This report provides a unique insight into the values, expectations, and mindsets into the students of these strategically international markets. The information provides essential background material for post secondary education institutions when preparing marketing and communications strategies.

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1. Methodology

The approach used involved a self-completion questionnaire which was designed by JWT Education with the input of BCCIE at every stage. BCCIE distributed the questionnaire to the province's government accredited and funded colleges, university-colleges, institutes and universities, who then handed the questionnaires to its international students for self completion. Data processing was done for the most part by the Centre for Education Information, commissioned by BCCIE, which was then passed on to JWT Education for coding.

The study sample comprised of a total of 564 international students.

A range of international students are included in the study, these being: undergraduate students (131 respondents), postgraduate students (39 respondents), English language students (264 respondents), and Vocational students (61 respondents). Some comparative analysis has been undertaken on differences between the perceptions of the various kinds of students. However, it needs to be kept in mind that the disproportional sample sizes make it difficult to interpret differences, in an absolute sense (free from the effect of sample size bias).

International students from a range of countries are also included in the study, and some comparative analysis has been undertaken on the two groupings which comprise the greatest proportion of students in this particular study – these being Asian/Pacific students (449 respondents), and European/American students (90 respondents).

Sample selection

- A targeted quota of a minimum of 30 students in each of the student groupings was achieved.
- All attempts were made to minimize distortion in the results due to any sample size variation to enable statistically valid comparisons to be made with other destination countries.
- Students were selected on the basis that they met certain criteria, namely that they were international students who are currently studying in British Columbia.
- For the purposes of the study, a student was deemed to be 'from a particular source country' if it was their country of *permanent* residence. For example, a student who may have been born in India but whose country of permanent residence is Sri Lanka would be deemed Sri Lankan.

Reading the tables

The tables have been prepared so that the results can be interpreted in several ways:

- The combined responses of the 564 international students who were represented in the study. (See sample table)
- The responses according to the actual type of student (i.e. undergraduate, postgraduate etc).
- The responses according to the students' source country, grouped as follows: Asian/Pacific students, European/American students and students from other countries. The column for European/American students, for example, relates to all students participating in the study who are from European or American countries.

When analyzing the tables please note:

- Unless otherwise specified, all figures used for the data columns are percentages, rounded to zero decimal places.
- Percentages found in the 'Total' rows located in the tables throughout the report represent the actual percentage of respondents who answered the questions. As a result of rounding the tables to the nearest whole numbers, these totals may slightly differ from the sums of the columns.
- There are instances throughout the tables where a single response question has responses totaling in excess of 100%. This occurred where a respondent was unable to place a priority on one response over another and an equal weight result was therefore recorded for both responses.
 - ◆ Instances where percentages totaling in excess of 100% also occur where multiple responses have been recorded. This means the line that represents the total number of responses combines all of the totals and gives a figure in excess of 100%. However, in these instances the line that relates to each answer refers to the percentage of respondents who answered that particular point and therefore provides an accurate picture of how many participants answered (unprompted) the point in question in that particular way.
 - ◆ Similarly, if no responses were recorded, there are a few instances where the percent total gives a figure of just under 100%.

An assessment of the data on a question-by-question basis is included in this report and is supported by summary statistics tables, graphics, and principal findings, and comments on the findings and their implications.

The report details the number of respondents who answered each of the questions and shows this as a percentage of the total sample. Where comparative analysis between various groupings has occurred, the small actual size of each grouping needs to be taken into account. Nonetheless, where differences exist in responses between the larger groups of respondents against the criteria stated in the briefing document these differences have been highlighted in order to present comparative insights that may need further exploration.

This research provides BCCIE with a very comprehensive understanding of its current image among its international students, where the opportunities lie for British Columbian post-secondary institutions to go forward with respect to extending its horizons, and the degree to which they are currently positioned to deliver this and how they can do so in the future. It also offers a unique insight into the values, expectations, and mindsets of its international students, hence providing essential background material for BCCIE when endeavouring to develop effective growth and marketing strategies.

2. Executive Summary

This study is based on an international market research survey, which examined the decision-making processes, values and satisfaction levels of 564 international students who are currently studying in post-secondary education institutions in British Columbia. The study incorporates students from the major source markets. For comparative purposes, students from these source markets have been grouped in the following manner: *Asian/Pacific students*, *European/American students* and *students from other countries*.

Decision-Making Processes When Considering International Education

Students make the decision to study overseas for a range of reasons. Nonetheless, they most frequently tend to regard *the experience gained by living in an overseas country* the greatest attraction. Along with this factor, the other draw card seems to be that students get *the experience of living internationally*. This reasoning tends to apply to all kinds of students. *Educational* factors, whilst still commonly acknowledged as reasons inspiring students to choose to study internationally, are seen as secondary to the students *desire to broaden their experience*.

Regardless of type of student and country of origin, students first tend to choose a particular *country* (66%), before selecting other aspects.

Canada seems to be undoubtedly the most favored study destination for the majority of students in the survey (favored by 75% of all students), indicating that the majority of students are indeed studying in their favored destination for their current level of study. Although the tendency to favor *Canada* applies to all kinds of students, first year undergraduate students seem less inclined than other kinds of students, to favor studying in this country (62% compared with 75% overall), but are much more inclined to favor studying particularly in the *US* in particular (30% compared with 15% overall).

Those students who favor *Canada* as a study destination, most probably tend to do so because of either *educational* related factors (71%) and/or *lifestyle/work related* factors (68%). First year undergraduate students (82%) in particular, tend to favor *Canada* for *educational* factors, and have a lower tendency to favor it for *lifestyle/work related* factors (59%). Similarly, *Asian/Pacific* students who favor *Canada* as a study destination have a greater tendency than *European/American* students do, to favor it because of *educational factors* (74% compared with 54% respectively).

Overall, the four most outstanding individual reasons for students who favor *Canada* as a study destination, in order of prominence, tend to be :

- *Better lifestyle/ standard of living than other countries* (33%)
- *Cheaper cost of study/courses than in other countries* (30%)

- *Better reputation than other countries* (28%)
- *Better quality of education than other countries* (23%).

Family persuasion tends to be a force for a notable proportion of either first year undergraduates (23%) or English Language students (23%) who favor Canada as a study destination. However, this factor rarely impacts on either second year undergraduates who favor Canada as a study destination (8%) or postgraduates who favor it (9%).

Furthermore, *family persuasion* seems more likely to impact on Asian/Pacific students who favor Canada as a study destination than on European/American students who favor it (22% compared with 5% respectively). Similarly, *cost* tends to be a more influential force for Asian/Pacific students who favor Canada as a study destination than for European/American students who favor it (32% compared with 23%, respectively).

Students who favor other destinations are more inclined to do so for *lifestyle/work related* factors (68%) than for *educational* factors (44%). The four most outstanding individual deciding factors for favoring other study destinations, in order of prominence, tend to be :

- *Better work opportunities after completion of study* (27%)
- *Better chance to improve career prospects* (26%)
- *Qualification from other country is more highly respected* (22%), and
- *More chance to broaden experience* (22%)

Although *cost* factors seem to have some bearing on the choice of Canada as a study destination, they rarely have any bearing on the choice of other countries rather than Canada.

Students who prefer studying in other destinations gave a wide range of reasons for finally choosing Canada as their study destination. European/American students who do not favor studying in Canada are very likely to still choose Canada because of *educational reasons* (63%). In contrast, Asian/Pacific students who do not favor studying in Canada tend to cite *cost* as a reason for their choice of Canada (33%).

The majority of students (84%) in the survey are studying in their most favored Canadian province, and this is most likely to be favored because of *environmental* factors. More than three-quarters of the students who favor British Columbia, do so because of *environmental* factors (78%). More specifically, British Columbia tends to be favored because of *the location* in that *its cities/region is regarded as more interesting/beautiful* (61%) and/or because of its *more suitable weather* (59%).

Although, the *cost of undertaking study* is rated of greatest importance, of all factors presented to students, when choosing a study destination, it only tends to be regarded as *quite important*. Nonetheless, this factor has, by far, the highest mean rating (7.3 out of 10). In contrast, students consider *ease of getting work in country while studying*, *ease of getting permanent residence in the country*, and *ease of getting travel and other student discounts in the country*, as being of least importance (below 5.0 out of 10).

Generally, Canada's standard of education is regarded as being only *good*, (7.9 out of 10), and only marginally above that of its main competitors, US and UK. The fact that Canada's standard of education is generally only considered to be *good*, but far from *excellent*, indicates substantial opportunity for improvement in student perceptions of Canada, before it can be considered a global leader. A similar pattern is generally reflected in the mean ratings of British Columbia's standard of education

Sources of Information When Decision-Making

Most students could think of some type of information deficiencies. However, although none of these are outstanding (only referred to by one-quarter of the students overall), the following are the most frequently mentioned information deficiencies: insufficient/absent information about *courses* (particularly for Asian/Pacific students), and about *student services* and/or *finding accommodation* (particularly for European/American students and postgraduate students).

The majority of students used the *Internet*, at least to *some extent* to help them when looking for information about studying internationally. However, Asian/Pacific students are less inclined than European/American students are, to be very prolific users: about three-quarters of European/American students (74%), compared with only 43% of Asian/Pacific students, used it a lot.

Only a small proportion of students (16%) have made the decision to study in British Columbia *without anyone's influence*. The highest proportion of students have been influenced by their *parents* (40%), while the second highest proportion have been influenced by their *friends* (33%) when choosing British Columbia as a study destination.

Even though formal sources, such as *Education Agents* (19%) or *schoolteachers and careers advisors* (13%), only have a minimal influence on a student's decision to study in British Columbia, *parents* and *Education Agents* tend to have a greater impact on the decisions of Asian/Pacific students than on European/American students.

Overall, less than half of the students (46%) had some contact with an *Education Agent*. However, Agent contact appears to be more widespread for English Language students (55%) and Asian/Pacific students (51%) than it is for other kinds of students. In contrast, only 28% of the postgraduate students and only 30% of European/American students had used an agent.

Although the majority of students (64%) who had some form of Education Agent contact consider it *useful*, only 15% consider this contact *extremely useful*.

Responsiveness of the Administrative Systems

The majority of students (64%) receive an offer for a place in their university/institution, *within three months* after submitting their application. Just over half (54%) received an offer *within six weeks*. However, the proportion of students who think it should *take no more than six weeks* after submitting an application to receive an offer of a place is much greater than the proportion of students who actually received it within this period (80% compared with 54% respectively). Similarly, the proportion of students who think it should take *no more than six weeks* after submitting a visa application to receive a visa is much greater than the proportion of students who actually received it within this period (75% compared with 53% respectively). This implies that a considerable proportion of students are not satisfied with both the period of time they have to wait for their institution's place offer, and to a slightly lesser extent, the time they have to wait for their visa.

Furthermore, the longer it takes after submitting an application to receive an offer for a place in a higher education institution, or to receive a visa, the greater the proportion of dissatisfied students.

Evaluation of the international study experience

Hardly any of the students (10%) think their expectations regarding their institution *have been exceeded*, while in total only one-third of the students (33%) consider the experience with their institution to be *at least slightly better than expected*. Similarly, hardly any of the students (13%) think their expectations regarding their study experience in British Columbia *have been exceeded*, while in total, only 39% of the students consider it to be *at least slightly better than expected*. Furthermore, only 34% of the current students will *definitely recommend* the experience, indicating that students are hesitant to highly recommend studying in this destination. These findings suggest that the experience that students tend to get whilst studying in British Columbia, and its institutions, will still need to improve before recurrent loyalty and high recommendations can be expected from current students.

The length of time that the student has been studying their current course in British Columbia seems to impact on student satisfaction and likelihood of recommending the experience. It appears that not only do students tend to become more satisfied with their institution and with British Columbia as they get used to the experience of living in British Columbia, they also then seem to have a greater tendency to recommend it.

Furthermore, European/American students, not only tend to be better informed overall, they are more likely to be satisfied, than Asian/Pacific students are, with both their institution and particularly with their experience of living in British Columbia. As many as 49% of European/American students (compared with only 31% of Asian/Pacific students), consider their experience with their institution to be at least *slightly better than expected*. Furthermore, the majority of European/American students (58%), compared with only a minority of Asian/Pacific students (33%), tend to be *at least quite satisfied* with their experience of studying in British Columbia. Hence, not surprisingly, European/American students are more inclined to recommend this experience. Of particular note is the greater inclinations of European/American students to *definitely recommend* the experience (66% compared with only 27%), indicating that the majority of European/American students (while only the minority of Asian/Pacific students), will *definitely recommend* studying in British Columbia.

The likelihood of retention of English Language students is also of particular concern here. Not only do they have a much lower tendency to be satisfied with their institution: only 23% of these students (compared with 33% overall) think that their institution performs at least *slightly better than expected*; they also have a much lower tendency to be satisfied with the extent that their experience of studying in British Columbia has met their expectations for international study. Only 27% of these students (compared with 37% overall) think that their experience in British Columbia has been at least *slightly better than expected*. Given these findings, it is not surprising that English Language students also have an even lower tendency than other types of students do, to *definitely recommend* the experience (22% compared with 33% overall). There seems to be a particular problem regarding *lack of opportunity to practice English*, particularly in relation to English Language courses, and Asian/Pacific students.

Generally, the students who rate their institution as *worse than expected* gave a wide range of reasons why they consider this so. Nonetheless, the most frequently mentioned reasons relate to factors concerning *poor teaching/boring classes*. Altogether, 30% of the students who rate their institution as *worse than expected* give their institution this poor rating because of these types of factors.

Nonetheless, nearly all the students can think of something they like about studying in British Columbia – the most prominent strength, according to its students, relating to *environmental* factors. Two-thirds of its students (66%) refer to *nature/environment/natural features* as an attribute of this particular province. In particular, the *beautiful scenery/environment/nature* stands out as a strength

(mentioned by 47% of all students). Even though both groups are equally likely to regard *nature/environment/natural features* as a whole as a strength, European/American students have a much greater tendency than Asian/Pacific students do to mention the *beautiful scenery/environment/nature* as a strength (60% compared with 45%, respectively).

The other most commonly mentioned strength associated with British Columbia is *its people* (mentioned by 35% of respondents). In particular, reference is made to the *kind, polite, friendly people* (mentioned by 28% of all students). However, English Language students have a much lower tendency than other kinds of students do, to refer specifically to the factors relating to *the people* in British Columbia as a strength (referred to by only 27% of the English Language students as a strength).

It is noteworthy that only 18% of the students consider factors relating to British Columbian *education* to be one of its strengths.

Generally, specific strengths seem to be more identifiable than factors considered to be specific weaknesses – the most frequently mentioned weakness/dislike relating to factors concerning *facilities* (referred to by 22% of its students as a deficiency of this particular province).

Students studying in British Columbia/Canada seldom tend to visit the country before going there to undertake their current international studies (less than one-third visited there beforehand) and a high proportion of students who had visited British Columbia/Canada before, had been there for study purposes. Vocational students have a much greater tendency of previously being in British Columbia/Canada than other types of students have. The majority of vocational students (59%) had been in British Columbia/Canada before their current level of study (and most probably for study purposes). In comparison, only a small proportion of other types of students (less than one-quarter) had been in British Columbia/Canada before their current level of study.

Just over half of the students (52%) already have personal contacts in British Columbia before studying there (this contact most probably being a friend). Only 43% have neither *friends* nor *relatives* already in British Columbia.

Primarily, their *parents* fund the greatest proportion of students studying in British Columbia (61%). Less than one-fifth of the students (18%) are *self-funded*, and very few students (7%) are primarily funded by *some form of scholarship*.

However, although *parents* primarily fund the majority of international students, this predominately applies to first year undergraduates and English Language students (71% of either of these kinds of students are funded by their *parents*). In contrast, it does not apply to postgraduate students or vocational students (particularly second years); given that only 33% of postgraduate students, and only 25% of second year vocational students, are funded by their *parents*.

Instead, as many as 26% of the postgraduate students are *self-funded*, while a further 23% are on *some form of scholarship*. Similarly, as many as 50% of the second year vocational students are *self-funded*.

Furthermore, while *parents* primarily fund the majority of Asian/Pacific students (67%), they are unlikely to be the most over-riding funding source for the majority of European/American students (30%).

Summary

In sum, the survey has identified several challenges facing public post-secondary institutions in British Columbia to achieve the potential of being a key player in international education marketplace. The major concerns relate to lack of high satisfaction regarding international students' experiences with both their institution and their experiences of living in British Columbia, and consequently their subsequent hesitation to highly recommend either of the experiences. This applies particularly to Asian/Pacific students and English language students. Other concerns relate to long administrative procedures especially in relation to application for admission to an institution and in relation to visa applications. The tendency to be inadequately informed about certain aspects of the experience also raises concerns.

However, several encouraging findings overshadow the obstacles in relation to developing the competitive position of British Columbian/Canadian post secondary educational institutions in the international marketplace. The spectacular environment, enforcing the image that British Columbia is one of the world's most beautiful regions, as well as cost factors are undoubtedly outstanding attributes. Nonetheless, BCCIE and its educational institutions need to be wary of the obstacles highlighted in the study. These obstacles require attention, or they may hinder them from taking full advantage of the opportunity to expand globally.

Section A - Decision-Making Processes when Considering International Education

One of the first stages students move through prior to undertaking international education is the decision making stage. Issues concerning decision making processes are of particular importance when assessing influences on a student's pre-purchase decision.

Understanding which factors actually influence students to choose British Columbia/Canada over competitors assists in the development of informed strategy.

3. Reasons International Study is Chosen

	Type of Student									Country of Origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Educational reasons												
Total	63	71	73	67	72	58	64	64	63	61	70	94
International qualification more highly respected/better reputation	34	40	43	36	46	27	44	42	50	31	47	69
Better quality of education	27	29	33	23	21	27	34	29	50	29	14	63
Family wanted me to study internationally	18	20	26	11	10	20	10	11	6	20	4	25
Course I wanted to study not offered in own country	7	9	7	11	8	5	10	11	6	6	14	13
Given a scholarship from home country	6	12	9	16	18	1	2	2		3	24	
Studied internationally before	5	7	8	5	8	3	7	4	13	6	4	
A requirement of the next institution I want to attend	3				5	6				4	3	
Could not get a university/institutional place in own country	3	3	2	5	3	3	5	7		3	2	
Broaden experience/improve prospects												
Total	83	84	79	92	85	84	85	82	94	84	83	94
Broaden experience	62	61	58	66	64	62	66	64	69	65	57	63
Wanted the experience of living internationally	48	53	42	69	51	46	44	40	56	48	53	56
Improve career prospects	44	49	49	49	51	45	33	31	38	44	50	50
Want to become permanent overseas resident	9	8	6	11	10	10	11	11	13	9	10	6
English												
Total	45	42	39	48	44	51	48	44	56	47	43	19
Wanted to learn English from native English speakers	38	36	33	41	41	42	36	33	44	39	39	19
Want to work in an English speaking country	9	7	8	7	8	9	16	16	19	10	4	
Wanted to/want to go on to study at post secondary level at an English speaking institution	7	5	6	3	3	9	10	9	13	7	7	
Other	4	4	2	7	3	2	5	4	6	2	10	6
NOT ESTABLISHED	2									0		

This table examines the reasons behind the students' decisions to undertake the experience of studying internationally. This analysis helps British Columbian international education marketing professionals to understand the kinds of aspects worth emphasising in their marketing and recruitment campaigns.

General Observations

- The most prominent reason why students tend to choose to study internationally is to *broaden their experience*. Altogether, nearly two-thirds of the students (62%) went overseas to study because they want to *broaden their experience*. A further 48% want the *experience of living overseas*.
- Although not as prominent as *broadening their experience*, another frequently mentioned reason why students choose to study internationally relates to *improving their prospects*: just under half of the students want to *improve their career prospects* (44%).
- It is of interest that English Language students seem just as likely as other types of students, to choose to study internationally because of factors relating to *broadening their experience/improving their prospects*.
- Another relatively commonly mentioned factor enticing students relates to *English Language* factors. Altogether, 45% of the students mention *English Language* factors as reasons for going overseas to study. More specifically, more than one-third (38%) go overseas because they *want to learn English from native English speakers*. Furthermore, the tendency to go overseas to study because of *English Language* factors appears to be similar for all types of students.
- Overall, factors relating to *broadening their experience/improving their career prospects* predominate over *educational factors* as reasons for undertaking international study. Altogether, 83% of the students refer to factors relating to *broadening their experience/improving their career prospects*, while 63% refer to *educational factors*, as reasons for going overseas.
- *An inability to obtain an institutional place in their own country* (3%) tends to be amongst the negligible reasons why students choose to study internationally.
- European/American students seem more inclined than Asian/Pacific students do, to be motivated to study overseas, because of the following reasons:
 - ♦ they think *an international qualification will be more highly respected* (47% compared with 31% respectively)
 - ♦ they were *given a scholarship in their home country* (24% compared with 3%, respectively)

- In contrast, European/American students seem less inclined than Asian/Pacific students do, to be motivated to study overseas because of the following reasons:
 - ♦ *Better quality of education* (14% compared with 29%, respectively), and
 - ♦ *Family wanted them to study internationally* (4% compared with 20%, respectively).

Comments

- Students make the decision to study overseas for a range of reasons. There are distinct value segments in the market that cross over national boundaries. This needs to be acknowledged when implementing marketing campaigns. What motivates one student may not be the same as what motivates another. Hence, there is a need to take a values-based approach to marketing. Marketing campaigns need to be diverse in their objectives, highlighting a wide variety of benefits that students can expect from undertaking and achieving this experience.
- Nonetheless, students most frequently tend to regard the experience gained by living in an overseas country as being of greatest value in going overseas to study. Along with this factor, the other draw card seems to be that students get the experience of living internationally. Consequently, the students' desires to broaden their experience, and the experience of living internationally, are seen as more beneficial, than the benefit of obtaining a superior standard of education to that of their home country. This reasoning tends to apply to all kinds of students. Hence the value of the experience gained by living in Canada whilst studying needs to be at the forefront of marketing campaigns. This highlights the importance of promoting a quality learning experience in marketing campaigns.
- Educational factors, whilst still commonly acknowledged as reasons inspiring students to choose to study internationally, are seen as secondary to the students desire to broaden their experience. Nonetheless, it still confirms the value of strengthening the promotion of British Columbia post-secondary training and education services worldwide.
- Practical necessities (such as the inability to study a particular course in their home country) rarely seem to motivate students.
- The fact that European/American and Asian/Pacific students tend to differ in many respects in their reasoning for going overseas to study, highlights the need for distinguish certain factors highlighted in the marketing campaigns when targeting students in the various countries. More specifically, greater emphasis needs to be given to raising the respectability of its international qualifications when targeting European/American students markets. In contrast, there is little value in highlighting this aspect when targeting Asian/Pacific students market. Alternatively, it may be much more worthwhile

highlighting aspects such as the better quality of education offered by studying in British Columbia, as obtaining a better quality of education appears to be an effective incentive for Asian/Pacific students.

- Considering the proportion of students being funded through overseas degree courses by their families, the number quoting their “family’s wish” as a motive is surprisingly low (18%).

4. Factors Chosen First when Deciding to Study Internationally

The following examines the positioning of the stages of the students' decision processes – giving insight into stages international students move through and primary decisions made when considering undertaking international education at their current level. By gaining insight into what types of decisions are crucial for international students, British Columbian international education marketing professionals can understand which aspects are of primary importance in their marketing campaigns when targeting these students.

Factors rated as most important when making decisions where to study internationally

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Country	66	68	66	70	56	69	69	73	56	69	53	75
Course/program	17	13	11	15	21	16	25	24	25	16	26	13
Institution	8	13	17	8	5	7	2		6	8	4	6
City	3	3	2	5	8	3	2	2		2	12	
Province	1	1	1				2		6		1	
NOT ESTABLISHED	5	3	3	2	10	4	2		6	4	3	6

Factors rated as in top 3 when making decisions where to study internationally

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Country	90	93	91	97	82	91	95	96	94	92	89	88
Course/program	64	60	66	52	74	64	67	69	63	65	66	50
Institution	63	66	72	57	69	63	54	51	63	65	54	56
City	34	33	29	39	26	34	41	42	38	32	46	31
Province	31	36	28	49	18	30	38	42	25	29	40	44
NOT ESTABLISHED	5	3	3	2	10	4	2		6	4	3	6

General Observations

- Regardless of type of student and country of origin, students most probably first choose a particular *country*, before selecting other aspects. Two-thirds of the students (66%) first chose the *country* in which to study, before considering other aspects.
- In spite of an overriding tendency to initially select a *country* in which to study, choice of *province* within the *country* is least likely to be of primary significance. Hardly any of the students in total (1%) first chose the *province* in which they would.
- Even though they also tend to select their study *country* first, European/American students have a greater tendency than other students do, to select their *course* before selecting other factors. About one-quarter of European/American students (26%), compared with about one-seventh or less of the students from other source countries, first chose their *course* before considering other factors.
- In contrast, Asian/Pacific students have a very low tendency of selecting their *course* first (only 16% had done so), but a higher tendency than others have, to first select the *country* in which they are to study (69%).

Comments

- The order of selection for students studying in British Columbia distinctly tends to be country first, then other factors. For most students in British Columbia, province and city selection simply depended upon the location of their chosen institution or course. The high proportion of students choosing their country first reinforces the need for British Columbian post secondary education institutions to promote the fact they are in Canada (rather than focusing on the fact they are in British Columbia) at the forefront of their marketing efforts. Furthermore, the extremely low proportion of students choosing their course first reinforces the minimal value in also using a pragmatic approach in marketing which focuses on vocational relevance.
- Nonetheless, given the relatively high proportion of European/American students who tend to choose their course first; it may be worthwhile placing some emphasis on courses available in British Columbia when endeavoring to attract this particular student market. To gain the competitive edge in Europe or America, British Columbian international education marketing professionals would be well advised to position certain core areas as centres of global excellence, thereby positioning the courses offered by their own institutions as world leaders. This especially seems to apply where the particular type of expertise is considered highly desirable by the source country's government and/ or employers.

5. Favored Countries for International Study

The following table examines students' preferences when choosing a country for their overseas study experience. This helps British Columbian international education marketing professionals to gain an insight into their main competitors and into the relative positioning of Canada's profile against that of competitors.

Country of first choice for current level of study

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Canada	75	70	62	80	85	78	69	69	69	75	82	63
United States	15	21	30	8	10	14	16	11	31	16	8	31
United Kingdom	4	4	2	7		5	7	9		4	3	
Australia	1	1	2			1	3	4		1	2	
Germany	1	1		3			2	2			2	
France		1	1									
Other	1	2	2	2			2	2		1	2	
Invalid response	1				5					1		6
NOT ESTABLISHED	2					2	2	2		2		

General Observations

- *Canada* seems to be undoubtedly the most favored study destination for the majority of students in the survey. This tendency to favor *Canada* generally applies to students from most countries and to all types of students. Altogether, three-quarters of the students (75%) favor studying in *Canada*, indicating that the majority of students are indeed studying in their favored destination for their current level of study.
- Besides *Canada*, which is overwhelmingly favored by the majority of students studying there, the *US* is the only other country that has some, although minimal, following – with 15% of all the students indicating that they prefer this destination, above *Canada*, for their current level of study.
- Although the tendency to favor *Canada* applies to all kinds of students, first year undergraduate students seem less inclined than other kinds of students, to favor studying in this country (62% compared with 75% overall), but are much more inclined to favor studying particularly in the *US* in particular (30% compared with 15% overall).

- Very few students (less than 5%) favor studying in any of the other prominent international study destinations, including the *UK*.

Comments

- The majority of students (75%) in the survey are studying in their most favored country. British Columbian international education marketing professionals need to ascertain factors contributing to Canada's favoritism in market share for these students and take advantage of this information as important elements of its branding identity.
- British Columbian international education marketing professionals need to be wary of the slightly lower proportion of undergraduate students (when compared to other kinds of students) favoring Canada as a study option. At the same time, factors need to be ascertained which contribute to US's dominance in market share for some undergraduate students and perhaps this information could then be used as a model to elevate and enhance Canada's own image.

6. Reasons Why Canada is Favored as an International Study Destination

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	421	105	56	49	33	207	42	31	11	336	74	10
	100	100	100	100	100	100	100	100	100	100	100	100
Educational reasons												
Total	71	72	82	61	55	73	76	84	55	74	54	100
Cost of study/courses are cheaper than in other countries	30	29	30	27	30	33	29	35	9	32	23	30
Better quality of education than other countries	23	25	30	18	15	24	19	16	27	24	11	60
Family wanted me to study in Canada	19	16	23	8	9	23	19	23	9	22	5	20
Canadian qualification more highly respected	12	13	16	10		13	12	16		12	5	70
Better courses than other countries	8	8	11	4	9	7	7	3	18	7	11	20
Previously studied in Canada	7	9	13	4	3	7	10	6	18	8	5	
Did not have a choice, organized by my home institution	2	4	4	4	3	1	2	3		2	5	
My government gives scholarships to study in Canada	1	3	2	4	3						7	
Course I wanted to study											1	
Scholarship		1		2							1	
Sister college												
Lifestyle/work												
Total	68	66	59	73	79	65	74	65	100	67	74	70
Better lifestyle/standard of living than other countries	33	30	29	31	42	30	38	35	45	31	38	50
Better experience of living internationally	28	30	29	31	36	27	31	26	45	28	31	10
More chances to broaden experience	21	17	11	24	27	22	12	10	18	21	22	30
Wanted to/plan to become permanent resident of Canada	14	12	5	20	15	14	17	6	45	13	20	10
Better chance to improve career/work prospects	12	13	13	14	9	12	7	10		11	18	10

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	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Better work opportunities after completion of study	10	12	16	8	12	9	7	3	18	9	15	10
Better work opportunities while studying	3	3	2	4	3	2	2	3		2	4	10
Safe country	2	2	4		3	2	5	6		3		
Like Canada/always wanted to come here	1	1		2	3		2		9	1	3	
Canada is multicultural	1	2	4							1	1	
Location/environment	1	1		2						1	1	
Friends/relatives here					3		2	3			1	
Outdoor/Recreation		1		2							1	
Recommendation												
Total	44	45	46	43	36	45	40	39	45	44	45	60
Better reputation than other countries	28	25	30	18	12	31	33	29	45	31	15	50
Recommended	21	26	23	29	27	19	10	13		19	32	20
English speaking	1	2		4						1	3	
NOT ESTABLISHED					3							
Other	2	3		6		2	2	3		2	3	

General Observations

- Those students who favor Canada as a study destination, most probably tend to do so because of either *educational* factors and/or *lifestyle/work related* factors.
- Nearly three-quarters of the students who favor Canada as a study destination (71%) choose it because of *educational* factors– more specifically because they think the *cost of study/courses are cheaper than in other countries* (30%) and/or because Canada is considered to have a *better quality of education than other countries* (23%).
- More than two-thirds of the students who favor Canada as a study destination (68%), choose it because of *lifestyle/work related* factors. More specifically, it tends to be perceived by these students as having the following assets:
 - ♦ *Better lifestyle/ standard of living than other countries* (33%)
 - ♦ *Better experience of living internationally* (28%), and/or
 - ♦ *More chances to broaden experience* (21%).
- The next most prominent reason why students finally select Canada tends to relate to *recommendation* factors. Altogether nearly half of the students who favor Canada as a study destination (44%) selected Canada because of *recommendation* – more specifically because they think it has a *better*

reputation than other countries (28%) or because it was simply *recommended to them* (21%).

- However, reasons relating to *reputation* seem less likely to be relevant to postgraduate students who favor Canada as a study destination (36%) than to undergraduate (45%) or English Language students who favor this study destination (45%).
- Hence, the four most outstanding individual deciding factors for students who favor Canada as a study destination, in order of prominence, tend to be :
 - ♦ *Better lifestyle/ standard of living than other countries* (33%)
 - ♦ *Cheaper cost of study/courses than in other countries* (30%)
 - ♦ *Better reputation than other countries* (28%)
 - ♦ *Better quality of education than other countries* (23%).
- Amongst factors least likely to influence final choice of Canada as a study destination are: *safety, location/environment, having friends or relatives already there*. Hardly any of the students (less than 3%) mentioned any of these aspects as final choice factors.
- Undergraduate students who favor Canada as a study destination tend to differ in the emphasis they put on choosing Canada for *educational related* factors – with first year undergraduate students (82%) tending to emphasize this factor far more than second year undergraduate students (61%) or postgraduate students (55%).
- Similarly, Asian/Pacific students who favor Canada as a study destination tend to differ from European/American students who favor do so, in that they seem to have a greater tendency than European/American students do, to favor it because of *educational factors* (74% compared with 54% respectively).
- First year undergraduate students who favor Canada as a study destination have a lower tendency to base their choice on *lifestyle/work related* factors (59%), than second year undergraduate students (73%) or postgraduate students (79%) who favor Canada as a study destination.
- It is also noteworthy that all the second year vocational students who favor Canada as a study destination base their choice of Canada on *lifestyle/work* factors.
- *Family persuasion* tends to be a force for a notable proportion of either first year undergraduates who favor Canada as a study destination (23%) or English Language students who favor it (23%). However, this factor does not tend to impact hardly at all on either second year undergraduates who favor Canada as a study destination (8%) or postgraduates who favor it (9%).

- Furthermore, *family persuasion* seems more likely to impact on Asian/Pacific students who favor Canada as a study destination than on European/American students who favor it (22% compared with 5% respectively). Similarly, *cost* tends to be a more influential force for Asian/Pacific students who favor Canada as a study destination than for European/American students who favor it (32% compared with 23%, respectively).

Comments

- Indications are that marketing campaigns need to primarily focus on two aspects as benefits of study in Canada, these being educational benefits and lifestyle/work benefits, as these are aspects most likely to influence students to choose Canada as a study destination.
- A demand for offering quality education is evident with the notable proportion of students choosing Canada because of the better quality of education than other countries (23%). They also tend to choose Canada because they believe it has a better reputation than other countries.
- It is of interest that educational factors, whilst still commonly acknowledged as reasons inspiring students to choose to study internationally, are seen as secondary to the students desire to broaden their experience, yet they are the most common reasons why students who favor Canada as a study destination, choose it as a place to study.
- The tendency to favor Canada as a study destination because of education factors supports the value of promoting Canadian post-secondary and training and education services as a world-class provider of quality education.
- Cost factors seem to be a relevant deciding factor when it comes to finally choosing a country for undergraduate study. Canada's image of being a cheap destination for international study appears to be recognized – with a considerable proportion of students who favor Canada as a study destination (30%) choosing this country for this reason. This suggests that Canada has a perceived cost advantage over other destination countries. British Columbian international marketing professionals need to take advantage of this feature and highlight it in their marketing communications for differentiation.
- A demand for an improved lifestyle is also evident with the relatively high proportion of students choosing Canada for lifestyle/work related factors. More specifically, it tends to be perceived by these students as having the following assets:
 - ♦ Better lifestyle/standard of living than other countries (33%)
 - ♦ Better experience of living internationally (28%), and/or
 - ♦ More chances to broaden experience (21%).

- A demand for offering specialized courses is not evident with the negligible proportion of students choosing Canada because of the availability of specific courses.
- Students make the decision to choose Canada for a range of reasons. There are distinct value segments in the market. This needs to be acknowledged when implementing marketing campaigns. What motivates one kind of student may not be the same as what motivates another. Hence, there is a need to take a values-based approach to marketing. Marketing campaigns need to be diverse in their objectives, highlighting a wide variety of benefits that students can expect from undertaking and achieving this experience. The following differentiations need to be taken into account:
 - ♦ Reputation tends to be a particular draw card for undergraduate students and English Language students.
 - ♦ Educational related factors – tends to be a particular draw cards for first year undergraduate students and Asian/Pacific students.
 - ♦ Lifestyle/work related factors – tend to be particular draw cards for second year undergraduate students and postgraduate students.
- Asian/Pacific students are not only more inclined than European/American students to be motivated to study overseas because their family wanted them to study internationally, they are also more likely to be influenced by their family to choose Canada as a study destination. This suggests that it is worthwhile to target families of potential students, as it would appear to exert influence & encourage Asian/Pacific students, to make Canada their favored choice of country.

7. Reasons Why Other Destinations are Favored for International Study

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	143	46	34	12	6	57	19	14	5	113	16	6
	100	100	100	100	100	100	100	100	100	100	100	100
Educational reasons												
Total	44	48	47	50	50	46	47	43	60	45	69	
Qualification from other country more highly respected	22	24	26	17	50	18	26	14	60	22	31	
Better quality of education than Canada	15	15	18	8		19	16	14	20	17	13	
Better courses than Canada	13	13	15	8		12	21	29		12	31	
Family wanted me to study in other country	6	11	9	17		5	5		20	8		
Cost of study/courses are cheaper than in Canada	4	4	3	8		4	5	7		3	19	
Previously studied in Canada	1					4				2		
Lifestyle/work												
Total	68	72	74	67	67	77	63	71	40	71	75	67
Better work opportunities after completion of study	27	28	35	8	67	25	42	43	40	28	25	50
Better chance to improve career/work prospects	26	30	29	33	17	32	5	7		29	25	
More chances to broaden experience	22	17	21	8	17	37	5	7		27	6	17
Better work opportunities while studying	20	24	29	8	17	21	21	29		22	6	50
Had family/friends in other country	17	15	15	17	17	18	32	36	20	16	19	50
Better experience of living internationally	13	15	18	8	17	18				16		
Better lifestyle/standard of living than Canada	8	4	3	8		14	11	14		8	13	

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	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	143	46	34	12	6	57	19	14	5	113	16	6
	100	100	100	100	100	100	100	100	100	100	100	100
Wanted to/plan to become permanent resident of other country	4	9	12			2	5	7		4	6	
It was closer to home	3	7		25			11	14		2	19	
Recommendation												
Total	26	28	32	17	33	23	32	29	40	24	38	50
Better reputation than Canada	18	22	24	17	33	12	26	29	20	19	25	
Recommended	8	7	9			12	5		20	6	13	50
NOT ESTABLISHED	15	7	3	17	33	12	5	7		12	6	17
Other	8	9	6	17		11	5	7		9	13	

There were 143 students who favored study destinations other than Canada and they were asked reasons why they favored other destinations for their international study experience. This helps British Columbian international education marketing professionals to gain an insight into areas where other destinations may have the competitive edge over Canada. Reasons for selecting other countries are also significant because country selection is one of the first aspects students tend to look at.

General Observations

- Students tend to favor studying in other destinations primarily because of *lifestyle/work related* factors.
- Even though students who favor studying in Canada are just as likely to choose it for *educational* factors and/or *lifestyle/work related* factors, students who favor other destinations are more inclined to do so for *lifestyle/work related* factors (68%) than for *educational* factors (44%).
- The same proportion of students favor Canada for *lifestyle/work related* factors as those favoring other destinations (68%). More specifically, other destinations are favored because of *better work opportunities after completion of study* (27%); and/or *better chance to improve career/work prospects* (26%).

- Nearly half of the students who favor other study destinations (44%) do so because of *educational* factors. More specifically, they tend to favor other destinations because they *think the qualification from another country tends to be more highly respected* (22% of students not favoring Canada).
- Similarly, Asian/Pacific students seem to have a much greater tendency than European/American students do, to favor Canada as a study destination because of *educational* factors (74% compared with 54% respectively). However, they seem to have a lower tendency than European/American students do, to favor other study destinations because of these kinds of factors (45% compared with 69% respectively).
- Even though nearly half of the students favoring Canada (44%) selected this destination because of *recommendation*, a much lower proportion of students who favor other destinations tend to do so because of this reason (26%).
- Hence, although a long way away from representing the majority, the four most outstanding individual deciding factors for favoring other study destinations, in order of prominence, tend to be :
 - ♦ *Better work opportunities after completion of study* (27%)
 - ♦ *Better chance to improve career prospects* (26%)
 - ♦ *Qualification from other country is more highly respected* (22%), and
 - ♦ *More chance to broaden experience* (22%)
- *Cost* factors seem very unlikely to be deciding factors for students who do not tend to favor Canada as a study destination. They also tend to be of much lesser influence on these students than on those favoring studying in Canada. Only 4% of the students not favoring Canada, attribute favoring other destinations to *cost* factors. Similarly, students' *families*, although of some influence for students favoring studying in Canada, tend to be of minimal influence for students not favoring studying there (mentioned by only 6% of the students who do not favor studying in Canada, as a reason for their choice).

Comments

- Lifestyle/work factors not only tend to be amongst the prominent factors enticing students to favor Canada, they also tend to be the most prominent factors enticing students away from favoring Canada. This suggests that there are certain aspects about the Canadian lifestyle/workplace, which work as either a positive or a negative draw card for students when choosing this country as a study destination.
- Educational factors are quite likely to influence Asian/Pacific students to choose Canada, but are quite likely to influence European/American students to choose other destinations.

- Recommendation is far more likely to have bearing on the choice of Canada, than it is to have bearing on the choice of other destinations.
- Although cost factors seem to have some bearing on the choice of Canada as a study destination, they rarely have some bearing on the choice of other countries rather than Canada. Hence, Canada's image of being a cheap destination for international study appears to be dominant, suggesting that Canada quite possibly has a perceived cost advantage over other destination countries. British Columbian institutions need to take advantage of this feature and highlight it in their marketing communications for differentiation.

8. Reasons Why Canada is Chosen when it is Not the Preferred Study Destination

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	143	46	34	12	6	57	19	14	5	113	16	6
	100	100	100	100	100	100	100	100	100	100	100	100
Cheaper/costs less												
Total	27	26	32	8		33	32	29	40	33		33
Cost of study/education is cheaper than in other countries	20	17	21	8		23	32	29	40	24		33
Cost of living is cheaper	13	15	21			18	5		20	16		
Society												
Total	18	17	21	8		23	21	21	20	19	19	17
Canada is a safe country/peaceful/politically stable	10	7	9			18	5	7		12	6	17
Canada is a friendly country/less racism/discrimination/felt welcome	4	9	9	8			5		20	3	19	
Love Canada	3	2	3			4	5	7		4		
Canada is already multicultural	1					2				1		
Better chance to improve work/career prospects	1						5	7		1		
Better lifestyle/standard of living	1					2				1		
Educational reasons												
Total	21	33	29	42	33	11	21	21	20	16	63	33
Quality of education												
Total	6	11	15		17	4	5	7		5	13	17
Better quality of education than other countries	6	11	15		17	2	5	7		4	13	17
Better reputation of education institution	1					2	5	7		2		
Exchange programs/co operation between home university and Canadian one	5	9	6	17		4				4	19	
Organized by home institution/had no choice	3	7	3	17		2				4		
Canadian college accepted me first/before others	3	7	6	8						1	19	
Could study what I wanted to	3				17		16	14	20	1	13	17
Won scholarship	2	2	3		17	2				1	13	
Friends/family/recommendation												
Total	17	24	24	25		14	16	21		16	25	17
Relative/family/friend already lives in Canada	10	15	15	17		9	16	21		12	13	
Family wanted me to study in Canada	4	7	9			2	5	7		3	6	17

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	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	143	46	34	12	6	57	19	14	5	113	16	6
	100	100	100	100	100	100	100	100	100	100	100	100
Recommended to me	3	4		17		4				3	13	
English speaking												
Total	6	4	3	8		7				4	25	
Learn English/improve my English	4	4	3	8		5				4	13	
Wanted to study in English speaking country but not USA	3					4				2	13	
Other												
Total	17	24	29	8		16	21	21	20	19	13	17
Canadian visa easier to obtain	6	9	12			5	11	14		7		17
Canada is beautiful/has natural beauty	6	9	12			5	5	7		6	6	
Other	5	7	6	8		5	5		20	5	6	
Not answered	29	15	15	17	67	33	21	21	20	27	13	17

The 143 students, who favored study destinations other than Canada, were asked to give their reasons why they chose Canada, even though it is not their preferred study destination. This information helps British Columbian international education marketing professionals to gain further insight into perceived additional benefits in studying in Canada rather than in competing countries.

General Observations

- Students who would prefer to study in other destinations gave a wide range of reasons for finally choosing Canada as their study destination.
- Although this does not represent the majority of students who prefer studying in other destinations, *cost* factors tend to be the most prominent reasons for finally choosing Canada, even though it is not their preferred study destination. *Cost* factors are referred to by 27% of these students; and the *cost of study/education being seen as cheaper than in other countries*, is specifically mentioned in one-fifth of the instances. This especially applies to Asian/Pacific students, but is inapplicable to European/American students (mentioned by 33% of Asian/Pacific students but none of European/American students not favoring studying in Canada, as a reason for finally choosing it as a place to study).

- The next most prominent reasons why students finally chose Canada even though it is not their preferred study destination, relate to either *the college and/or its quality of education* (mentioned by 21% of the students who prefer other destinations). However, this predominately applies to European/American students, but rarely applies to Asian/Pacific students (mentioned by 63% of European/American students but only 16% of Asian/Pacific students, as a reason for finally choosing Canada as a place to study even though it is not their preferred study destination.).
- *Society-related factors and/or friends/family recommendation* are other prominent reasons referred to (each respectively mentioned by 21% and 17% of the students who prefer other destinations, as reasons why they finally chose to study in Canada).

Comments

- The importance of cost factors for Asian/Pacific students is emphasized by the finding that *cost* factors have some bearing on their choice of Canada as a study destination. This applies to Asian/Pacific students who favor Canada as a study destination, and also for Asian/Pacific students who may have preferred destinations other than Canada. This further substantiates the dominance of Canada's image of being a cheap destination for international study, and the perceived cost advantage of Canada over other destination countries.
- Even if Canada is not perceived as a quality or attractive choice in its own right, a considerable proportion of European/American students still tend to choose Canada because of the college and/or its quality of education. This corresponds with the finding that a relatively high proportion of European/American students tend to choose their course first. This supports the value of strengthening the promotion of British Columbian post-secondary training and education services in European and American markets – particularly by positioning certain core areas as centres of global excellence.
- The finding that Asian/Pacific students are quite likely to be influenced by their family to choose British Columbia as a study destination, regardless of whether it is their favored study destination, further substantiates the impact of family influence on Asian/Pacific students. This tends to verify the value in targeting families of potential Asian/Pacific students in promotional campaigns.
- The uniqueness of certain factors influencing the final decisions of Asian/Pacific students requires specific attention. This differentiation reinforces the need for British Columbian international education marketing professionals to recognize that Asian/Pacific students tend to be influenced about which country and province to choose according to a different set of forces than European/American students.

9. Whether British Columbia is the Favored Canadian Province for International Study

Having chosen to study in Canada, students were also asked whether British Columbia was their first choice of Canadian provinces.

The following table examines students' preferences when choosing a province for their international study experience. This helps British Columbian international education marketing professionals to gain an insight into the present positioning of their provinces profile against that of other Canadian provinces.

Whether British Columbia was first choice of Canadian provinces

	Total	Type of student						Country of origin				
		Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Yes	84	86	82	92	87	86	84	82	88	85	88	75
No	12	14	18	8	13	11	16	18	13	12	11	25
NOT ESTABLISHED	3					3				2	1	

General Observations

- The majority of students in the survey predominantly tend to favor *British Columbia* out of all Canadian provinces. This high inclination to favor *British Columbia*, having chosen Canada as a study destination, tends to apply to all groups of students in the survey. Altogether 84% of the students favored studying in *British Columbia*, indicating that the majority of students are indeed studying in their favored Canadian province.

Comments

- The majority of students (84%) in the survey are studying in their most favored Canadian province. This figure is particularly significant given that generic marketing in British Columbia is relatively uncommon. British Columbian international education marketing professionals need to ascertain factors contributing to British Columbia's favoritism in Canadian market share for these students, and take advantage of this information and use it as important elements of its brand identity.

10. Canadian Provinces Favored Above British Columbia

The 70 students who favored studying in Canadian provinces other than British Columbia, were asked to indicate their most favored province, and to give reasons why they preferred these particular Canadian provinces above British Columbia.

Preferred province for study

	Total	Type of student							Country of origin			
		Undergraduate			Postgraduate	English	Vocational		Asia Pacific	Europe Americas	Other	
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	70	21	16	5	5	29	10	8	2	56	10	4
	100	100	100	100	100	100	100	100	100	100	100	100
Alberta	29	19	19	20		41	30	38		34	10	
Saskatchewan	1									2		
Newfoundland	1	5	6								10	
Nova Scotia	3				20						20	
Ontario	56	57	50	80	80	52	60	50	100	59	40	50
Quebec	9	14	19			7	10	13		5	20	25
Invalid response	1	5	6							25		25

General Observations

- Students who prefer provinces other than British Columbia, tend to favor *Ontario*. More than half of the students in the survey not favoring studying in British Columbia (56%) prefer to study in *Ontario*. However, this relatively high representation of *Ontario* mainly applies to Asian/Pacific students. Generally, there are a considerably lower proportion of European/American students, than Asian/Pacific students favoring *Ontario*, rather than British Columbia (40% compared with 59% respectively).
- *Alberta* is the only other province that warrants a mention as a preferred alternative province to British Columbia. Altogether 29% of the students in the survey who had not favored studying in British Columbia prefer to study in *Alberta*. However, this tendency to prefer *Alberta* also mainly applies to Asian/Pacific students and is not representative of European/American students – where only 10% of European/American students compared with 34%/of Asian/Pacific students favor *Alberta*.
- Very few students, who had not favored studying in British Columbia, prefer studying in the remaining Canadian provinces than either *Ontario* or *Alberta*.

Comments

- Although the majority of international students studying in British Columbia, tend to favor studying there, international British Columbian international education marketing professionals need to be wary of the potential threat of Ontario as a study option within Asian/Pacific student marketplace.

11. Reasons Why Provinces Other than British Columbia are Favored

The 70 students who would most like to have studied in provinces other than British Columbia were asked to indicate why they preferred these other provinces. This helps British Columbian international education marketing professionals to gain further insight into areas where provinces other than British Columbia may have the competitive edge over British Columbia.

Reasons why other provinces preferred

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	70	21	16	5	5	29	10	8	2	56	10	4
	100	100	100	100	100	100	100	100	100	100	100	100
Educational reasons												
Total	33	29	19	60	40	41	30	13	100	36	30	
Better quality of education	29	24	19	40	20	38	30	13	100	34	10	
Course I wanted to do/preferred college	4	5		20	20	3				2	20	
Environment/cultural												
Total	71	81	81	80	60	66	90	88	100	71	60	100
Location - cities, region more interesting/beautiful	33	48	56	20	20	31	20	13	50	29	50	50
Had family/friends in that province	31	38	38	40	40	21	60	75		32	20	50
Cost of living/taxes cheaper	13	10	6	20		14	20	25		14		25
Weather better	9	10	13		40	7				5	10	50
Job opportunities	3						20	13	50	2		25
Recreational/social												
Total	33	38	50		20	34	30	38		34	30	25
Social/cultural opportunities better	27	33	44		20	28	20	25		29	20	25
Tourist activities better	10	19	25			7	10	13		11	10	
Recreational opportunities better	4	10	13							5		
Other	13	10	13		20	10	10	13		13	20	
NOT ESTABLISHED	3					7				4		

General Observations

- The majority of students who tend to favor studying in provinces other than British Columbia tend to do so primarily because of *environmental/cultural related* factors. Nearly three-quarters of the students who favor studying in other provinces (71%) tend to do so because of *environmental/cultural related* factors. More specifically, these other provinces tend to be favored by these students because of their *city location*, because the *region is considered more interesting/beautiful* (33%), and/or because *they have family/friends in that province* (31%).
- However, although impacting on all students, generally, *environmental/cultural* factors seem to have a greater impression on Asian/Pacific students than on European/American students as reasons for favoring studying in other provinces (71% compared with 60% respectively).
- Although *environmental/cultural related* factors tend to be the most prominent reasons why students favor studying in other provinces, *recreational/social related* factors and *educational* factors also tend to have some impact. About one-third of the students who favor studying in other provinces (33%) consider *recreational/social related* factors amongst the reasons for their preference. More specifically, 27% of these students favor provinces other than British Columbia because they think *the social/cultural opportunities are better* (27%).
- About one-third of the students who favor studying in provinces other than British Columbia (33%) mention *educational* factors as reasons for their preference. More specifically, other provinces are favored because the *education is considered to be better* (29%). However, undergraduate students who favor studying in other provinces seem to have a higher tendency than postgraduate students who also favor studying in other provinces, of citing *educational* factors as reasons for preferring other provinces above British Columbia.

Comments

- Environmental/cultural related factors seem to be a major draw card for the other study provinces in Canada particularly for those students who place high value on environmental aspects. A notable proportion of students (71%) choose provinces other than British Columbia for these kinds of reasons, suggesting that provinces such as Ontario, and to some extent, Alberta, may have a perceived advantage over British Columbia in that they are seen to have environments that are more appealing.

12. Reasons Why British Columbia is Chosen when it is Not the Preferred Canadian Province

The 70 students who favored studying in Canadian provinces other than British Columbia were asked to give their reasons why British Columbia was chosen as a place to study even though it is not their preferred Canadian province. This helps British Columbian international education marketing professionals to gain further insight into perceived additional benefits in studying in British Columbia rather than in other provinces.

Reasons finally chose to study in British Columbia

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	70	21	16	5	5	29	10	8	2	56	10	4
	100	100	100	100	100	100	100	100	100	100	100	100
Education												
Total	54	62	63	60	40	52	60	63	50	54	60	50
Quality												
Total	24	19	19	20	20	28	40	50		23	30	25
Better quality of education/many good education facilities	21	14	19		20	28	30	38		21	20	25
Reputation of certain BC educational institutions	3	5		20			10	13		2	10	
Lower tuition fees	11	19	19	20		10	10		50	14		
Ease of acceptance into uni/school relative to other parts of Canada	10	14	13	20	20	3	10	13		5	30	25
Could study what I wanted/found course I liked	6	5	6			10				7		
Sister college in BC	4	5	6			3				5		
Not many students from home country	3					7				4		
Able to transfer credit between institution and BC institution	1						10		50	2		
Nature/ environment												
Total	23	24	19	40	20	24	20	25		23	30	
Weather is more suitable	17	14	13	20	20	21	10	13		21		
Natural beauty	9	14	6	40		3	10	13		5	30	
Recreational opportunities	4	5	6		20	3				4	10	

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Other												
Total	39	33	25	60	60	41	20	25		34	60	50
Recommendation by others	11	5	6			17				11	20	
Had friends/family in British Columbia	9				20	14	10	13		7	10	25
Relative proximity to home/no need to swap flights/just across the Pacific	6	5		20		7	10	13		5	10	
Better job opportunities	3	5		20		3				4		
Wanted to move from British Columbia but couldn't get accepted elsewhere	3	5	6			3				4		
Other	13	14	13	20	40	7				7	40	25
Not answered	14	14	19		20	10	30	25	50	14		50

General Observations

- Students who prefer to study in other Canadian provinces, finally chose to study in British Columbia most probably because of *educational* factors (mentioned by more than half of the students (54%) who prefer other Canadian provinces, as reasons why they finally chose British Columbia). This generally applies to all the students.

Comments

- The finding that more than half of the students not favoring British Columbia, nonetheless still chose to study there because of educational factors substantiates the importance of educational factors to international students. Hence, even though British Columbia may not be seen as having a better environment than other study destinations, it has the competitive edge in relation to educational factors, and ultimately it appears that educational factors have a priority over environmental factors.
- This finding emphasizes the importance of educational factors in the international education marketplace.

13. Reasons Why British Columbia Tends to be the Favored Choice of Canadian Province

Those students whose first study preference was British Columbia rather than other Canadian provinces were asked to indicate why British Columbia is their most favored province.

Reasons why British Columbia was first choice

	Total	Type of student								Country of origin		
		Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	476	130	74	56	34	227	51	37	14	383	79	12
	100	100	100	100	100	100	100	100	100	100	100	100
Educational reasons												
Total	42	48	51	43	29	39	35	32	43	42	38	58
Better quality of education	21	20	27	11	15	22	24	24	21	23	9	33
Able to transfer credit to other institutions in BC/ Canada/other country	13	15	18	11	3	15	10	8	14	14	8	25
Able to transfer credit to home country institutions after completion	9	9	7	13	6	7	2	3		8	9	17
Able to transfer credit from home country studies	7	11	9	13		5	2		7	6	9	17
No choice/organized by home institution	2	4	4	4		2				2	6	
Course offerings	2	2	1	2	12					1	6	8
Environment												
Total	78	77	76	79	91	78	75	68	93	79	73	100
Location - cities, region more interesting/beautiful	61	56	53	61	85	59	63	51	93	59	67	83
Weather more suitable	59	58	57	61	56	62	59	51	79	62	39	67
Recreational/social												
Total	52	52	51	52	47	54	57	59	50	53	52	42
Family/friends in BC	29	31	32	29	9	31	43	51	21	31	22	17
Social/cultural opportunities better	18	18	18	18	26	18	14	8	29	19	18	
Tourist activities better	14	11	9	13	21	16	14	11	21	14	18	25
Recreational opportunities better	11	13	9	18	15	8	6	8		9	22	8
Other												
Proximity to home	1	1	1			1	2		7	1		
Recommended					3						1	
Safe/civilized						1				1		
Other	5	5	1	9	6	5	2		7	5	5	
NOT ESTABLISHED	1						8	11		1	1	

General Observations

- The majority of students who favor British Columbia as a Canadian province tend to do so because of *environmental* factors.
- More than three-quarters of the students who favor British Columbia, do so because of *environmental* factors (78%). More specifically, British Columbia tends to be favored because of *the location* in that *its cities/region is regarded as more interesting/beautiful* (61%) and/or because of its *more suitable weather* (59%).
- In some respects, postgraduate students who favor British Columbia as a Canadian province, tend to have different reasoning for choosing British Columbia, than other students do. In particular, postgraduate students have a greater tendency to attribute their choice to *environmental* factors (91% compared with 78% overall). More specifically, postgraduate students who prefer studying in British Columbia have a greater tendency to refer to the *location* in that *its cities/region is regarded as more interesting/beautiful*, as reasons for their preference (85% compared with 61% overall).
- Furthermore Asian/Pacific students who favor British Columbia as a Canadian province, tend to differ from European/American students who do so, in that Asian/Pacific students seem to have a greater tendency to favor this province because of *weather suitability* (62% compared with 39% respectively).
- *Recreational* factors are the second most prominent reasons given by students who favor British Columbia as a Canadian province, as a reason for doing so (52%).
- Although well below representing the majority, *educational* factors tend to have some impact on a student's choice of British Columbia. Altogether 42% of the students, who favor studying in British Columbia rather than in other provinces, attribute their preference to *educational* factors (most probably, because it is perceived to have a *better quality of education*).
- Postgraduate students who favor British Columbia as a Canadian province, tend to also vary with regard to the extent they attribute their preference to *educational* factors. Postgraduate students seem less inclined to emphasize *educational factors* as a reason for favoring British Columbia over other Canadian provinces: only 29% of postgraduate students compared with 42% of the students overall, and 48% of the undergraduate students who favor British Columbia over other provinces, do so because of *educational* factors.
- Hence, the two most outstanding individual deciding factors for students who favor British Columbia as a Canadian province, tend to be its *location -cities, region more interesting/beautiful* (61%), and/or *more suitable weather* (59%). Other factors that may sometimes have some impact are: *having family in British Columbia* (29%), and *better quality of education than other provinces* (21%).

Comments

- The majority of students who favor British Columbia as a Canadian province tend to do so because of environmental factors. Hence, in developing a database of British Columbian international education system attributes and marketing these attributes, it may be beneficial to highlight the benefit of a quality learning experience in a spectacular natural setting.
- British Columbia's image of being a beautiful interesting environment for international study appears to be at the forefront – with significant numbers of students (61%) choosing this country for this reason. British Columbia institutions need to take advantage of this feature and highlight it in their marketing communications for differentiation. This approach is particularly likely to be effective for postgraduate students.
- While cost factors are seen to be of some importance when choosing Canada over other study destinations, it does not seem to be a deciding factor when it comes to finally choosing a province within Canada for international study.
- The finding that about half of the students tend to choose British Columbia because of recreational factors, indicates a demand for good recreational facilities. In contrast, hardly any of the students who would have preferred a province other than British Columbia attribute their preference to recreational factors. Hence, this may also possibly be an area of competitive advantage for British Columbia over other provinces.
- Students are also quite likely to choose British Columbia because of education factors (42%). This correlates with the reasons why students chose to study in Canada.
- However, education factors do not tend to induce postgraduate students to consider studying in British Columbia.
- The uniqueness of certain factors influencing the final decisions of Asian/Pacific students requires specific attention. This differentiation reinforces the need for British Columbian international education marketing professionals to recognize that Asian/Pacific students tend to base their decision about which country and province to choose according to a different set of values than European/American students. In particular, the higher regard Asian/Pacific students tend to place on aspects such as weather suitability, needs to be taken into account.

14. Important Factors when Choosing an International Study Destination

The six factors relating to selection of an international study destination have been examined in terms of students' perceptions of their relative importance. Students are asked to rate the following five factors on a scale of 1 to 10, where 1 is Not at all Important and 10 is Very Important in students' choice of country as a study destination. The mean response for each of the factors in a student's choice of country as a study destination was then calculated. These factors were then ranked in order of most important to least important. By ranking each selection factor, a better understanding can be obtained of students' selection needs and hence areas for improvement can be targeted accordingly. This question enables further understanding about which attributes of an international study destination actually lead to students choosing it over other destinations.

The following table shows an interpretation of the mean ratings of the importance of international study destination selection factors:

Rating	Interpretation of rating
1.0 -2.9	Very unimportant
3.0 - 4.9	Unimportant
5.0 - 5.9	Mediocre/neutral
6.0 - 7.9	Slightly important
8.0 - 9.9	Quite important
10.0	Highly important

The overall mean scores given by the various students staff for the value of the various selection factors is shown in the table below on the following page:

Important factors when deciding on a study destination

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61			449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Cost of studying in country	7.3	7.4	7.5	7.3	6.8	7.2	7.6	7.6	7.8	7.3	7.1	7.3
Easy to get work in country after graduation	5.9	6.3	6.4	6.1	5.2	5.6	7.5	7.0	8.8	6.1	5	6.5
Easy to get student visa	5.8	6	6.2	5.7	4.5	6	6	5.8	6.8	5.9	5.4	6.3
Easy to get work in country while studying	4.9	5.3	5.5	4.9	4.2	4.5	5.8	5.9	5.7	5	4	4.9
Easy to get permanent residence in the country	4.9	5.1	5.4	4.7	4.8	4.6	6.1	5.7	7.3	5.1	4	4.6
Easy to get travel and other student discounts in country	4.4	4.3	4.1	4.5	3.7	4.4	4.7	4.6	5.2	4.4	4.3	4.4

Factors rated as top 3 when deciding on a study destination

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Cost of studying in country	55	62	66	57	48	54	62	35	50	56	52	69
Easy to get work in country after graduation	37	42	40	46	34	30	59	38	51	39	26	44
Easy to get student visa	34	38	41	32	21	36	34	33	39	35	29	44
Easy to get work in country while studying	22	28	28	26	18	18	27	27	32	24	12	25
Easy to get permanent residence	24	23	26	18	23	22	38	37	32	25	15	13
Easy to get travel and other student discounts	14	11	9	14	16	14	17	10	31	14	16	6

General Observations

- None of the factors presented to students are of very high or even quite high importance when selecting a study destination. No factors have an overall mean rating of at least 8.0 out of 10, which falls in the *high importance* range.
- Although of all factors presented to students, the *cost of undertaking study* is rated of greatest importance when choosing a study destination, students generally consider it only quite important. Nonetheless, this factor has, by far, the highest mean rating (7.3 out of 10). Furthermore, 55% of all students gave this factor one of the top three ratings.
- In contrast, students consider *ease of getting work in country while studying*, *ease of getting permanent residence in the country*, and *ease of getting travel and other student discounts in the country*, as being of least importance. All these factors have particularly low mean rating (below 5.0 out of 10), indicating that, on average, students consider these to be quite unimportant.
- The other two factors, *ease of getting work in the country after graduation*, and *ease of getting student visas*, fall between these extremes and are only considered to be of mediocre importance (with mean ratings only ranging from 5.8 to 5.9).
- It is noteworthy that postgraduate students tend to rate *ease of getting student visas* below the norm (giving this factor a mean rating of only 4.5 compared with the mean rating of 5.8 overall), indicating that this factor tends to be of even lesser importance to postgraduate students than to others.
- Furthermore, vocational students tend to rate *ease of getting permanent residence in the country* above the norm (giving this factor a mean rating of only 6.1 compared with the mean rating of 4.9 overall), indicating that this factor tends to be of greater importance to vocational students than to others.

Comments

- Students purchasing international education seem to be quite aware of cost. Although they are not tremendously conscious of it, they tend to be much more aware of this factor than they are of other factors. Over half the students surveyed are highly aware of institutional costs. Marketing efforts to attract students need to focus on cost considerations, highlighting aspects such as value for money.
- The very low emphasis that students tend to place on the ease of obtaining work while studying, ease of getting permanent residence in the country, and ease of getting travel and other student discounts in the country as selection factors, indicates that there is little value in British Columbia emphasising these factors in their marketing campaigns.

- Although Asian/Pacific students tend to base their decision about which country and province to choose according to a different set of values than European/American students, this differentiation is not evident with respect to perceptions of relative importance of factors relating to selection of an international study destination.

15. Mean Ratings of the Standard of International Education

Students were asked to rate the standard of education of a number of countries on a scale of 1 to 10, where 1 indicates very poor and 10 indicates the highest, this being excellent. The mean rating for each country was then calculated in order to provide an overall measure of student perceptions of the standard of education in the various countries.

The following table shows an interpretation of the mean ratings and their likely impact on student loyalty.

Rating	Interpretation of Rating	Likely impact on students' loyalty
1 - 2.9	Very poor	Will definitely not recommend; negative word of mouth likely
3 - 4.9	Poor	Will probably not recommend
5 - 5.9	Mediocre	Riding the fence
6 - 7.9	Good	May recommend
8 - 9.9	Very good/ Highly satisfactory	Very strong loyalty; positive referrals likely
10.0	Excellent/ Outstanding	Totally committed

The mean rating (out of 10.0) for each country's standard of postgraduate education is as follows:

Rating of quality of education overall

	Total	Type of student						Country of origin				
		Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61			449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Canada	7.9	8	7.8	8.3	8.4	7.8	7.9	8	7.9	7.9	8.3	7.5
British Columbia	7.8	7.7	7.4	8.1	8.4	7.7	8	7.9	8.3	7.7	8.2	8.3
United States	7.8	7.8	7.8	7.8	8.6	7.7	7.6	7.7	7.5	7.8	7.7	8.6
United Kingdom	7.7	8	8.1	7.8	7.8	7.5	7.8	7.8	8.1	7.6	8	7.7
Australia	6.9	7.1	6.8	7.7	7.3	6.7	6.5	6.5	6.4	6.7	7.8	7.4
Germany	6.9	7.1	6.9	7.3	7.2	6.6	7.1	6.6	8.8	6.7	7.8	5.4
France	6.7	6.9	6.9	7	6.9	6.3	6.7	6.2	8.6	6.5	7.5	5.9
Home Country	6.7	6.9	6.4	7.6	6.9	6.4	6.5			6.5	7.6	6.6
Japan	6.3	6.7	6.6	6.8	6.3	5.9	6.4	6.4	6.2	6.2	7.7	3.7
New Zealand	6	6.4	6.3	6.6	5.3	5.8	5.9	5.6	6.8	5.9	7.8	7.5
Singapore	5.8	6.6	6.5	6.6	5.8	5.2	6.4	6.1	7.3	5.8	7.5	4.5

General Observations

- None of the countries mentioned achieved a mean rating of more than 8.0 out of 10.0, indicating that none of these countries are regarded as having a consistently *outstanding* standard of education.
- Generally, Canada's standard of education is regarded as being only marginally above that of its main competitors, US and UK. Although Canada has the highest mean rating of all countries mentioned, its mean rating is only 7.9 out of 10, indicating that students only consider Canada to have a *good*, but not *very good* standard of education.
- Rating of Canada as being only *good* is consistent for all kinds of students except for second year undergraduate students, postgraduate students and European/American students - all of whom, on average tend to consider Canada's standard of education slightly higher (rating it, on average, in the *very good* range).
- Furthermore, although Canada's standard of education is generally regarded as the uppermost of all countries mentioned, this is not reflected in the mean ratings given to Canada by certain types of students. In particular, this does not tend to apply to either first year undergraduates (who tend to rate UK above Canada (8.1 compared with 7.8) and US as equal to Canada; or to postgraduate students (who tend to rate US above Canada (8.6 compared with 8.4). Furthermore, this does also not tend to apply to students from countries other than Asia/Pacific or Europe/America (who also tend to rate US well above Canada (8.6 compared with 7.5).
- On average, students tend to regard their home country's education standard as being, at best, only *good*, and generally below that of Canada.
- Most kinds of students generally consider British Columbia's standard of education as only *good* (i.e. mean ratings within the range of 6.0 and 7.9). However, this relatively low perception is not reflected in the ratings given by the following types of students: second year undergraduates, postgraduates and European/American students, and other non Asian/Pacific students (who rate, it on average, slightly higher at 8.3-8.4 out of 10, hence perceiving it to be *very good*).
- Generally, European/American students have a slightly greater tendency than Asian/Pacific students do, to highly regard both Canada's and British Columbia's standard of education. European/American students tend to give Canada a mean rating of 8.3 and British Columbia a mean rating of 8.2. In comparison Asian/Pacific students tend to give Canada a mean rating of only 7.9 and British Columbia a mean rating of 7.7.
- Furthermore, European/American students, when compared with Asian/Pacific students, also tend to place higher value on their home country's standard of education. European/American students tend to give their home country's standard of education a mean rating of 7.6, while

Asian/Pacific students tend to give their home country's standard of education a lower mean rating of only 6.5).

- Although students from both destinations tend to regard Canada's and British Columbia's standard of education as superior to that of their home country, this differentiation tends to be greater with regard to Asian/Pacific students than it does with regard to European/American students. Generally European/American students rate their home country's standard of education as 7.6, and that of Canada and British Columbia as 8.3 and 8.2 respectively, while Asian/Pacific students rate their home country's standard of education as 6.5, and that of Canada and British Columbia as 7.9 and 7.7 respectively.

Comments

- The fact that Canada's standard of education is generally only considered to be good, but far from excellent indicates substantial room for improvement in student perceptions of Canada. A similar pattern is generally reflected in the mean ratings of British Columbia's standard of education, indicating that both Canada and British Columbia should work co-operatively at improving the perception of quality to support the individual institutions' own marketing efforts. Both Canadian and British Columbian markets need to raise their educational standard in order to be considered to be providing international students high quality education and centres of education excellence.
- European/American students tend to have better perceptions of both Canada's and British Columbia's standard of education, than do Asian/Pacific students. European/American students tending to view it as very good while Asian/Pacific students tending to view it as only quite good, therefore suggesting a need to raise the profile of both Canada's and British Columbia's standard of education in Asian/Pacific marketplace.
- The fact that European/American students generally consider both Canada and British Columbia to have very high education standards, indicates that quality of education can be regarded as a draw card when marketing these destinations in Europe and America.
- Since the standard of education overseas is generally regarded as better than that of the students home country, it is surprising that obtaining a better standard of education is not seen as being a major force in enticing students to go overseas to study.
- Furthermore, it is of interest that the standard of education in the US and UK was ranked virtually equal to that of Canada and British Columbia even though the US and the UK are much less favored, than Canada. This implies that students prefer to study in Canada, rather than in the US or the UK, for reasons other than the standard of education.

- Nonetheless, since the discrepancy between home country's standard of education and that of Canada and British Columbia is quite large for Asian/Pacific students, obtaining a better standard of education may still therefore be a good draw card for this particular market.
- It appears that the number of students rating a country the highest on the quality scale does not necessarily equate to the number opting to study there. This indicates that, although perceived quality seems to be important, other factors may override it, even at the initial evaluation stage. This reinforces the need for British Columbian international education marketing professionals to adopt a values based approach in their marketing activities by recognising that individual students, or groups of students, base their decision about which country and institution to choose according to their own sets of values. For example, whilst a student may consider quality to be an important consideration, they may view a shorter undergraduate degree course, cost, safety or access, to be of equal or greater significance.
- The high rating that postgraduate students tend to give to British Columbia's standard of education is surprising given the previous finding that education factors do not tend to entice postgraduate students to consider studying in British Columbia.

16. Earliest Thoughts About Studying in Canada

Students were asked to indicate how long ago they first started thinking about studying in Canada. The following tables examine the timing of the students' decision process - when did it start, and how long did it take. This helps international education marketing professionals to understand the optimum timing for marketing activity in each source country

When first thought about studying in Canada

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
More than 3 years ago	19	25	21	31	18	12	41	33	63	20	14	38
2-3 years ago	17	20	18	23	18	15	18	18	19	17	20	13
1-2 years ago	37	33	34	31	31	42	20	20	19	38	36	19
6-11 months ago	16	13	14	11	23	18	18	24		14	24	19
Less than 6 months ago	5	5	8	2	3	7	2	2		6	3	13
Less than 3 months ago	3	2	3			4				3		
Less than 1 month ago	1	1		2	3	1				1	1	
Invalid response	1				5		2	2		1		
NOT ESTABLISHED	2	1	1								1	

General Observations

- Three-quarters of the students start thinking about studying in Canada *at least one year* before enrolling, and notably 36% start thinking about it *two or more years* beforehand.
- Generally only about one-quarter of the students (25%) enroll within the *same year* that they start thinking about studying in Canada.

Comments

- Students start making their decisions regarding international education at an age well before they are about to embark upon the experience. Overall, three-quarters of the students start thinking about studying in Canada at least twelve months before enrolling, and notably, 36% started thinking about it two or more years beforehand. This highlights a need to target marketing campaigns at late secondary age students, when they are about 15 or 16 years of age, because that is when the vast majority of decisions seem to be made.

17. Length of Time Taken to Choose British Columbia After Selecting Canada

Time to choose BC after deciding to study in Canada

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
More than 3 years	2	2	1	3		3	2	2		2	2	
2-3 years	3	1		2	8	3	5	4	6	3	3	6
12-23 months	3	3	3	3	5	3	3		13	3	2	
6-11 months	7	5	4	7	5	8	11	13	6	8	7	
Less than 6 months	9	9	11	5	5	9	8	7	13	9	6	13
Less than 3 months	13	15	19	10	13	13	5	4	6	13	8	25
Less than 1 month	21	21	17	28	15	24	16	18	13	22	21	6
No time at all/decision made immediately	39	43	43	43	46	36	48	51	38	37	49	44
Invalid response						1						
NOT ESTABLISHED	3	1	1		3	2	2		6	2	2	6

General Observations

- Nearly all of the students made the decision to study in British Columbia *within six months* of selecting Canada as a study destination – in fact as many as 60% made this decision *within one month* of choosing Canada.
- It is also notable that 39% of the students made their decision to study in British Columbia *at the same time* that they chose Canada as a study destination.

Comments

- There is negligible time lapse between choosing to study in Canada and choosing a study province. For effective marketing outreach, students need to be approached in mid to late secondary school years regarding studying in Canada and which province to study in.

Section B - Sources of Information when Decision-Making

The information search stage is another vital stage that students undergo before purchasing international education. Issues concerning information search are of particular importance when assessing influences on an international student's pre-purchase decision. Hence, establishing what sources are effective in initiating the purchase of international education is a critical aspect of understanding students' pre-selection needs and hence targeting improvements accordingly.

The information search stage generally involves the collecting of information about studying in Canada and British Columbia from either (or both) internal or external sources.

18. Most Valuable Information Sources when Selecting Canada/British Columbia

Information source of greatest value in decision to studying in Canada/BC

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Education agent/consultant	30	25	29	20	18	38	23	24	19	35	9	6
Course guide from institution	27	35	33	38	44	17	31	29	38	28	20	44
Internet	26	25	20	33	49	22	18	22	6	22	48	44
Other information from institution	12	19	22	13	8	10	7	2	19	12	9	13
School/college	10	15	16	15	8	9	3	4		10	13	13
Canadian Embassy/Consulate	10	13	12	13	3	11	10	7	19	10	8	13
Interview with institution representative	5	7	4	10	18	3	5	7		5	9	
CEC	5	7	8	7	5	5	2		6	6	1	
Publication/Directories	5	3	6			7	7	4	13	6		
BCCIE	4	3	3	2		3	5	4	6	4		
Newspaper advertisement/article	4	4	6	2		3	5	7		4		
Exhibition Fair	3	6	7	5	5	3				3	4	
Library	3	3	4	2	5	3	2	2		4		
Word of mouth (net)												
Total	49	41	46	34	41	55	56	60	44	50	50	50
Word of mouth - friends (peer group)	24	23	24	20	26	25	26	24	31	25	22	31
Word of mouth - family	17	16	20	10	5	20	15	18	6	17	14	25
Word of mouth - alumni/former student	13	8	7	10	5	15	20	24	6	13	18	
Word of mouth - teachers/careers advisor	8	7	9	5	13	9	8	9	6	8	10	6
Word of mouth - other	3	1	2		3	3	3	4		2	3	13
Travel agent	2	1		3		3				2	3	
Don't know	2	1		3		3	2	2		2	1	
Other	3	2	2	2	5	2	5	4	6	3	7	
NOT ESTABLISHED	3	1	1		3	2	2		6	2	1	

General Observations

- Students tend to think that *Education Agents/consultants*, *course guides from institutions*, and/or the *Internet* are the most valuable information sources out of the ones they used to which they used to make their decision about studying in Canada/British Columbia. Overall, just under one-third of the students (30%) think that *Education Agents/consultants* are of greatest value, while 27% think *course guides from institutions* are the most valuable of the individual information sources they used. A further 26% consider the *Internet* to be of greatest value of the information sources they used.
- However, overall, about half of the students consider *word-of-mouth sources* to be the most valuable information sources out of the ones they used to make their decision about studying in Canada/British Columbia. This high regard particularly applies to *peer group word-of-mouth*.

Comments

It is important to note that since students obviously did not use all the different kinds of information sources, therefore perceptions of greatest value are dependent on the actual information sources used. Hence, the ranking of the most valuable information sources has been influenced by the number of students actually using this source. This means that the greater the number of students actually using a particular source, the greater the probability that this source is considered of greatest value. Meanwhile infrequently used sources have a lower chance of being highly regarded, because students were not able to comparatively rate the value of these sources against ones they actually used. This needs to be kept in mind when interpreting the results of this question, as it may not necessarily give a clear overview of which are the most effective sources to use when targeting students

19. Kind of Information Received when Selecting Canada/British Columbia

The following table examines the information sources utilized by students when deciding to study in Canada/British Columbia. This helps British Columbian international education marketing professionals gain insight into the most powerful influences on students' pre-purchase decisions and the effectiveness of various forms of promotional material.

Information received from sources

	Type of student										Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other	
		Total	1st yr	2nd yr			Total	1st yr	2nd yr				
Total	564	151	90	61	39	264	61	45	16	449	90	16	
	100	100	100	100	100	100	100	100	100	100	100	100	
Information about courses	63	64	61	67	87	56	74	76	69	61	76	69	
Information about institutions	57	60	54	67	59	52	75	71	88	58	56	63	
Information about applying to institutions	40	46	46	48	41	38	39	42	31	41	39	44	
Information about the city where institutions located	40	42	40	44	41	36	46	44	50	40	40	44	
Information about the country	39	40	41	38	44	38	39	40	38	40	38	38	
Information about finding accommodation	30	29	26	34	36	32	18	20	13	30	37	13	
Information about the province	22	25	29	20	13	23	16	18	13	23	19	38	
Information about obtaining visa	22	24	24	23	18	23	18	18	19	21	24	38	
Student Services Information	11	13	14	11	10	12	3	4		11	11	6	
Canadian Immigration Information	5	5	7	2	3	6	7	2	19	6	4		
Information about social activities	5	4	3	5	5	5	2	2		5	4		
Did not receive any information	2	2	1	3		3	3	2	6	3	1		
Other	2	1	2			3				2			
NOT ESTABLISHED	4	3	2	3	3	2	2		6	2	4		

General Observations

- Students receive various kinds of information from the sources they used to help them decide to study in Canada/British Columbia.
- Information about *courses*, then information about *institutions* are the most commonly received kinds of information (mentioned by 63% and 57% respectively).
- Although not representing the majority, information about *the city where institutions located* (40%), information about *the country* (39%), and information about *finding accommodation* (30%), tend to be the other frequently mentioned kinds of information received.

Comments

- Generally, the kind of information that students tend to receive is diverse, indicating that a broad range of information needs to be promoted to ensure maximum effectiveness of any marketing campaign.
- In particular, these results indicate the value in showcasing information about institutions and their courses when promoting British Columbia educational products and services.

20. Information Gaps when Trying to Decide About Studying in Canada/British Columbia

Students were also asked to mention any information which they think is insufficient or missing that would have helped them decide about studying in Canada/British Columbia. By enquiring about what kinds of information students may have wanted more of, gaps in information provision can be established, hence giving further insight into the effectiveness of and demand for various forms of promotional material.

Information that was not enough or missing that would have helped in decision making

	Total	Type of student							Country of origin			
		Undergraduate			Postgraduate	English	Vocational		Asia Pacific	Europe Americas	Other	
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Information about courses	28	26	31	18	18	32	21	27	6	32	13	13
Information about student services	26	27	28	26	28	25	28	31	19	25	31	19
Information about finding accommodation	25	27	28	26	41	21	23	29	6	25	29	31
Information about social activities	19	20	23	15	23	20	11	13	6	20	13	19
Canadian Immigration Information	17	19	20	18	26	16	20	20	19	18	16	13
Did not consider information to be lacking	16	17	14	20	21	16	21	16	38	16	24	6
Information about BC	16	21	20	23	10	17	7	7	6	16	18	13
Information about the city where institution located	15	20	23	15	5	16	16	18	13	15	16	25
Information about institutions	14	16	18	13	5	16	18	20	13	14	14	13
Information about applying to institutions	14	13	17	8	8	17	8	11		16	4	6
Student visa information	12	9	10	8	18	12	11	13	6	13	10	
Information about the country	8	8	10	5	8	8	5	7		8	8	6
Other	4	6	6	7	5	3	8	7	13	4	4	19
NOT ESTABLISHED	4	3	1	7	3	2	5	2	13	2	6	6

General Observations

- There does not appear to be any prominent aspect of information that students think they needed more about to help them select to study in Canada/British Columbia.
- Nonetheless, most students could think of some type of missing or inadequately provided information. Only a small proportion of the students (16%) cannot think of any information deficiencies/gaps.
- Insufficient/absent information about *courses*; *student services* and/or *finding accommodation* tend to be the most frequently mentioned insufficiencies that students think would have helped them decide about studying in Canada/British Columbia. However although the greatest proportion of students refer to these aspects, this does not represent the majority. Only about one-quarter of the students refer to each of these aspects, hence none of them stand out as information deficiencies.
- Lack of/inadequate information about *finding accommodation* tends to be a particular problem for postgraduate students – with as many as 41% (compared with 25% overall) referring to this aspect as an information deficiency.
- Furthermore, lack of/inadequate Information about *British Columbia* and about *the city in which their institution is located* tends to be more prominent for undergraduate students than for postgraduate students – 21% of the undergraduate students (compared with only 10% of the postgraduate students) think there is lack of/inadequate information about *British Columbia*. Similarly, 20% of the undergraduate students (compared with only 5% of the postgraduate students) think information about *the city in which their institution is located*, is lacking.
- Lack of/inadequate information about *courses* tends to be a much more prominent deficiency for Asian/Pacific students than it does for European/American students (mentioned by 32% of Asian/Pacific students compared with only 13% of European/American students as an information gap).
- It is noteworthy that although 63% of the students receive information about *courses*, as many as 28% of all students think that information on this aspect is absent or insufficiently provided to help them decide about studying in Canada/British Columbia.
- However, despite only 22% receiving information about *British Columbia*, only 16% think that there is inadequate information on this aspect provided to help them decide about studying in Canada/British Columbia. Similarly, despite only 39% receiving information about *Canada*, only 8% think that there is insufficient information on this aspect.

Comments

- The finding that most students could think of some type of missing or inadequately provided information, suggests that there is still opportunity for information provision to be improved.
- The particular problem for postgraduate students in relation to lack of/inadequate information about finding accommodation needs tackling as this may be a driver for dissatisfaction for these particular kinds of students.
- The fact that there is variation between different kinds of students in relation to their perceptions of information deficiencies, indicates a need to develop separate marketing campaigns when targeting the various kinds of students, as their information needs tend to differ. Alternatively, it may be that accessibility to the available information which differs between various kinds of students. If this is the case, then issues regarding information accessibility need addressing.
- The lack of/inadequate information about courses for Asian/Pacific students also needs attention, as this tends to be quite a prominent deficiency for these students (mentioned by 32% of Asian/Pacific students).

21. Amount of Internet Access when Looking for Information About Studying Internationally

The following table outlines the frequency which students use the Internet to help them when looking for information about studying internationally. This information assists British Columbian international education marketing professionals in their understanding of the impact and value of using the Internet as a marketing instrument for British Columbian institutions.

Amount of Internet access for getting information

	Total	Type of student						Country of origin				
		Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Not at all	12	12	13	10	5	9	30	24	44	12	7	19
A little/somewhat	34	35	33	38	21	41	26	29	19	39	18	13
Very much	48	50	48	52	72	44	41	44	31	43	74	56
Don't know	3	3	4			5	2	2		3	1	13
NOT ESTABLISHED	2	1	1		3	1	2		6	2		

General Observations

- The majority of students used the Internet, at least to *some extent* to help them when looking for information about studying internationally. However, although still representing the majority, this tends to be less applicable to vocational students than it does to other kinds of students. Only 67% of the vocational students (compared with 82% overall) used the Internet, at least to *some extent* to help them when looking for information about studying internationally. This proportion drops to only 50% when considering second year vocational students only.
- However, although the Internet tends to be used, at least to *some extent*, by the majority of students, Asian/Pacific students are less inclined than European/American students are, to be prolific users. While about three-quarters of European/American students (74%) used it a lot, only 43% of Asian/Pacific students were prolific users.

Comments

- The vast majority of students used the Internet, indicating that there is great value in promoting British Columbia educational products and services through a searchable on-line system expertise database, and that utilising the Internet to facilitate communication and information sharing, indicates that

communication initiatives will indeed enhance British Columbia's communication efforts.

- There is considerable variation in the extent to which the Internet has penetrated each source country market: While the Internet seems to have successfully penetrated European/American student market, this does not apply to the Asian/Pacific student market. The majority of Asian/Pacific students are not prolific users. This correlates with the lower tendency of Asian/Pacific students to utilize this information source. This differentiation needs to be kept in mind when evaluating the best marketing means for the various international target markets.

22. Influences on a Student's Choice to Study in British Columbia

Students were asked who influenced their decision to study in British Columbia. Results are presented in the following table.

People who influenced decision to study in BC

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Parents	40	46	49	43	31	43	30	33	19	42	31	44
Friend (peer)	33	34	38	30	33	34	30	33	19	34	31	44
Education agent/consultant	19	13	17	8	23	24	10	11	6	22	6	6
No one influenced my decision	16	19	14	26	23	12	25	18	44	15	26	19
Former student from BC/Canada - alumni	16	9	11	5	21	17	18	16	25	17	14	6
Other relative	15	15	14	15	3	16	26	29	19	17	8	19
Teacher/careers adviser	13	14	14	13	15	12	13	13	13	12	19	6
Other	6	8	10	5	3	6	2	2		5	9	13
Institution representative	4	7	7	7	3	3	5	7		4	7	
Don't know	1	1		3		1				1	2	
NOT ESTABLISHED	2	1	1	2	3	1	2		6	2		

General Observations

- *Parents*, followed by *friends*, tend to have the greatest impact on a student's choice of British Columbia as a study destination. Although not quite representing the majority, the highest proportion of students have been influenced by their *parents* (40%), while the second highest proportion have been influenced by their *friends* (33%) when choosing British Columbia as a study destination.
- Only a relatively small proportion of students (16%) have made the decision to study in British Columbia without *anyone's* influence.
- Furthermore, formal sources, such as *Education Agents* (19%) or *schoolteachers and careers advisors* (13%), only have a minimal influence on a student's decision to study in British Columbia.

- The low impact of *alumni* as an influence (16%) also needs to be noted.
- There is considerable variation between Asian/Pacific students and European/American students regarding the impact of *parents*, and *Education Agents* on their decision to study in British Columbia. More specifically, either of these sources tends to have a greater impact on the decisions of Asian/Pacific students than on European/American students: 42% of Asian/Pacific students compared with only 31% of European/American students are influenced by *parents*. Similarly, Education Agents influence 22% of Asian/Pacific students, compared with only 6% of European/American students.
- Furthermore postgraduate or vocational students seem to have a lower tendency than other types of students do of being influenced by their *parents*: only 30%-31% of these kinds of students compared with at least 43% of the other kinds of students, tend to be influenced by their *parents* when choosing to study in British Columbia.
- However in relation to vocational students, *parental* influence and the influence of *friends* tends to be much less insignificant for second year vocational students (19%) than it does for first year vocational students (33%). However, in contrast, second year vocational students (44%) are much more inclined than first year vocational students (18%) to make their decision to study there, without anyones influence – in fact deciding on one's *own* tends to be much more common for second year vocational students, than it is for any other type of student.
- Overall, the comparatively low proportion of postgraduate students influenced by either *parents* (31% compared with 40% overall), or *other relatives* (3% compared with 15% overall) needs to be noted.

Comments

- Although the greatest proportions of students studying in British Columbia are funded primarily by their parents (61%), parental influence on a student's choice to study in British Columbia, is relatively not that high (40%). This correlates with the finding that students also do not generally tend to rely on information provided by their family when choosing a university.
- Even though there is no prevailing power, some influences undoubtedly exist, especially given that only a small proportion of students (16%) have made the decision to study in British Columbia without anyone's influence.
- At least one third of all students say that a parent influenced their decision to study in British Columbia, while about one-third referred to a friend. These results support the great value of using informal sources as primary information sources, and as crucial persuaders. This highlights the importance of ensuring effective and ongoing distribution of promotional material to the family and friends of prospective students, as well as the

students themselves. In particular, it seems that students tend to listen to what friends have to say about studying in British Columbia post secondary education institutions. Hence, the importance of targeting this source cannot be underestimated, as indications are that these informal sources tend to be more effective than formal sources.

- However, although parents may seem to be amongst the most effective marketing targets, the lower impact of this source within the European/American student market, and also on postgraduate or second year vocational students needs to be taken into account. This correlates with the finding that European/American students seem less inclined than Asian/Pacific students do, to be motivated to study overseas because *Family wanted them to study internationally*.
- In relation to Asian/Pacific students, parents are presumably influential in a student's decision, because in the majority of cases (67%), they are involved in the funding. There is also a stronger sense of family in many Asian countries, with parents playing a strong influential role in their children's lives. The relatively high proportion of Asian/Pacific students subject to parental influence is most probably a reflection of the high proportion of students funded by this source. The fact that family members frequently influenced student's decisions reinforces the need to target marketing campaigns not just at Asian/Pacific students, but also at the entire family unit.
- Although the second greatest proportion of students uses Education Agents, this proportion is well below the majority. Only just over one-third (36%) used this source indicating that Education Agents tend to be relatively infrequently used information sources. English Language students are unique in that their relationship with Education Agents tends to be relatively strong (44%).
- The low proportion of students saying that an Education Agent influenced their decision when choosing to study in British Columbia, indicates that although Education Agents may be of value in certain other aspects of a student's British Columbian study experience, their influence in relation to major decision-making issues is not strong.
- Nonetheless, the greater impact of Education Agents on the decisions of Asian/Pacific students than on European/American students needs to be noted, especially given that Asian/Pacific students also seem much more inclined than European/American students do, to utilize Agents as an information source (43% compared with 11% respectively).
- The relatively high proportion of second year vocational students (44%) who made their decision to study in British Columbia, without anyone's influence, suggests that concentrating marketing efforts directly on the student may be worthwhile when targeting these kinds of students.

- The extent that alumni influence a student's final choice of study in British Columbia is lower than expected (16%), suggesting the likelihood of an under-utilized opportunity. The previous finding that alumni are rarely used as information sources for Canadian/British Columbia education opportunities (only 14% of the students use alumni as an information source) further supports this. An alternative explanation could be that students who consult Canadian/British Columbia university alumni, tended to be referred to other study destinations, rather than British Columbia. This latter presumption needs to be explored, for if substantiated, may have implications for British Columbian marketing campaigns.
- Careers advisors and schools tend to be of only minor influence on a student's choice of study in British Columbia, when sourcing information about where to study, or when choosing to study abroad.
- When compared with most other kinds of students, postgraduate students have a lower tendency to be influenced by their parents or by their friends. This suggests that postgraduate students are least inclined to be persuaded by informal sources. Marketing efforts directed at postgraduate students and their peers may reap the greatest benefits if they are directed at formal sources.
- The relationship of target market audience with peers (friends, acquaintances, counselors, family etc.) contributes toward marketing decisions. Post secondary education institutions will have to build a network of "friends" and "family" who will convert their friends and acquaintances into loyal and frequent supporters. At present, this influence is not very strong, particularly in European/American countries. Means need to be devised that could influence these seemingly "secondary" (indirect) audiences as ways to reach primary targets.

Section C - The Value of Using an Agent in the Decision-Making Process

Education Agents are considered an important source of information for international students.

This section examines the impact of this information source in British Columbia and how the international student marketplace perceives the value of using this potentially important communication channel.

23. Extent of Contact with Education Agents

Had contact with an education agent/consultant

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
No	52	58	58	57	69	44	52	47	69	47	70	88
Yes	46	42	41	43	28	55	43	51	19	51	30	13
NOT ESTABLISHED	3	1	1		3	1	5	2	13	2		

General Observations

- Less than half of the students (46%) had some contact with an Education Agent.
- Education Agent contact appears to be more widespread for English Language students than it is for other students. English Language students are far more likely than other students (particularly when compared with postgraduate students) to have had contact with an Education Agent. More than half of the English Language students (55%) had contact with an Education Agent. In contrast, only 28% of the postgraduate students had done so.
- Similarly, Asian/Pacific students have a much greater tendency than European/American students do, to have had contact with an Education Agent. About half of Asian/Pacific students (51%) compared with only 30% of European/American students had done so.

Comments

- Education Agent contact tends to be more prevalent for English Language students and Asian/Pacific students, but is relatively infrequent for European/American students and students other than English Language students. The greater impact of Education Agents on the decisions of Asian/Pacific students and on English Language students is particularly relevant, especially given that these students also seem much more inclined to utilize Education Agents as an information source, and to be influenced by them into choosing British Columbia as a study destination.

- The higher proportion of students who had agent contact, than the proportion influenced by an Education Agent when deciding to study in British Columbia, indicates that although their influence in relation to major decision-making issues is not strong, Education Agents may be of value in certain other aspects of a students British Columbia study experience.

24. Type of Assistance Received from Education Agents

The 258 students who have had contact with an Education Agent were asked about what the Education Agent did for them. The following table shows their responses.

What education agent/consultant did

	Total	Type of student							Country of origin				
		Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe	Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr				
Total	258	63	37	26	11	144	26	23	3	228	27	2	
	100	100	100	100	100	100	100	100	100	100	100	100	
Gave information and brochures about institutions	75	79	86	69	45	74	73	70	100	76	59	100	
Submitted my application to institutions	65	63	65	62	82	65	54	52	67	66	59	50	
Gave me student visa, accommodation advice	59	52	62	38	64	63	42	43	33	63	30		
Gave advice on which institutions to apply to	52	52	49	58	45	49	58	61	33	51	59	50	
Gave me information about immigration to Canada	10	10	8	12	18	10	4		33	9	15		
Not very much	5	3	3	4		7	4	4		5	4		
Other	2	2		4		3				2	4		
NOT ESTABLISHED	3	2		4		3	8	9		2	7		

General Observations

- Education Agents most probably *gave students information and brochures about universities*: 75% of all students who had agent contact received this kind of assistance.
- Other frequently mentioned ways Education Agents assisted students are with *application submission* (65%), and/or *advice on visas and/ or accommodation* (59%), and/or *advice on which institutions to apply to* (52%).

- Education Agents assisted 82% of the postgraduate students who had agent contact by *submitting the students' applications to universities*. In contrast, less than two-thirds of the other kinds of students who had agent contact have been assisted in this manner. At the other extreme, only 54% of the vocational students have been assisted in this manner.
- Furthermore, while the large majority of students were assisted by *receiving information and brochures relating to universities*, this did not tend to apply to postgraduate students. Only a relatively low proportion of postgraduate students who had agent contact (45%), compared with about three-quarters of all other kinds of students who had agent contact, *received information and brochures relating to universities*.
- The proportion of students who *received advice regarding visa and accommodation* from their Education Agent also varied: ranging from 42% of the vocational students who had agent contact, to 63%-64% of the English-language or postgraduate students who had agent contact.
- There are also considerable differences in the way Asian/Pacific students and European/American students who had agent contact, are assisted. In particular, Asian/Pacific students have a much higher tendency than European/American students do, to get *information and brochures relating to post secondary education institutions* (76% compared with 59% respectively) and/or to get *advice regarding visa and accommodation* (63% compared with 30% respectively). However, the effect of disproportional sample sizes needs to be taken into account when drawing conclusions from this apparent difference.

Comments

- Education Agents tend to perform a diversity of tasks for students, depending on type of student, and also on source country of student. In particular, postgraduate students get assisted in different ways than other students.
- Furthermore, there is considerable variation between Asian/Pacific students and European/American students regarding the impact of Education Agents on their decision to study in British Columbia, and also regarding the kinds of assistance received. Education Agents not only tend to have a greater impact on the decisions of Asian/Pacific students than on European/American students, they also have a greater tendency to assist Asian/Pacific students by giving them information and brochures relating to post secondary education institutions, and/or by giving them advice regarding visa and accommodation.

25. Usefulness of Education Agents

The 258 students who have had contact with an Education Agent were asked to rate the usefulness of the contact. The following table shows their responses.

How useful the agent was

	Total	Type of student						Country of origin				
		Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	258	63	37	26	11	144	26	23	3	228	27	2
	100	100	100	100	100	100	100	100	100	100	100	100
Extremely useful	15	16	22	8	9	14	12	13		14	22	
Quite useful	49	52	41	69	45	49	46	48	33	49	52	50
Not very useful	24	21	27	12	36	26	15	17		25	11	50
Of no use	3	6	8	4		2	4	4		4		
Don't know	3	2		4		3	4		33	3		
Invalid response	0									0		
NOT ESTABLISHED	6	3	3	4	9	6	19	17	33	5	15	

What education agent/consultant did

	Gave information and brochures about institutions	Gave advice on which institutions to apply to	Submitted my application to institutions	Gave me student visa, accommodation advice	Gave me information about immigration to Canada	Not very much	Other	NOT ESTABLISHED
Total	193	134	168	151	25	13	6	7
	100	100	100	100	100	100	100	100
How useful the agent was								
Extremely useful	17	22	18	18	20			14
Quite useful	52	51	55	53	36	8	33	43
Not very useful	21	19	18	19	28	38	33	
Of no use	2	1	1	2	4	23		
Don't know	2	1	1	2	8	23	17	
Invalid response				1				
NOT ESTABLISHED	6	6	6	6	4	8	17	43

General Observations

- Although the majority of students (64%) who had agent contact consider this *useful*, only 15% consider this contact *extremely useful*.
- Giving students *information about immigration to Canada* is generally less likely to be considered of value, than the other forms of assistance referred to. Only 56% of the students, who received *information about immigration to Canada from their agent*, consider this to be of at least some use. In comparison, between 69% - 73% of the students who received other kinds of assistance from their Education Agent, consider it to be of at least some use.
- Second year undergraduate students tend to be more satisfied than other types of students do, with their Education Agents help – with 77% of the second year undergraduate Students compared with 64% overall, considering this help to be either *quite*, or *extremely useful*. In contrast, postgraduate students tend to be slightly less satisfied than other students are, with assistance they received. Only 54% of the postgraduate students who had agent contact regard this help as either *quite* or *extremely useful*. Postgraduate Students were most likely to receive *assistance from agents regarding application submission*.
- Asian/Pacific students seem less inclined than European/American students do, to be satisfied with their Education Agents help (63% compared with 74% respectively). However, the effect of disproportional sample sizes in this respect needs to be taken into account when drawing conclusions from this apparent difference (228 compared with 27 respectively).

Comments

- Education Agents are generally considered quite useful, tending to act as a buffer between the student and the institution. The fact that about two-thirds of the students found the Education Agents' help to be at least of some use, is particularly positive.
- Second year undergraduate students are most likely to find their Education Agent's assistance "extremely useful".
- Given that giving students information about immigration to Canada is generally less likely to be considered of value, than the other forms of assistance referred to, it may be worthwhile advice for British Columbia international education marketing professionals to encourage Agents to concentrate on assisting students in ways other than this.
- Reasons why Education Agents quite frequently tend to be seen as ineffective information sources for postgraduate students need to be explored. In particular, the effectiveness of the Education Agent's role in assisting students with their application submission requires some attention.

Section D – Responsiveness of the Administrative Systems

The success of Canada/British Columbia in attracting students often comes down to how quickly and effectively the country and its tertiary institutions can respond to relevant applications. Lengthy and cumbersome administrative systems tend to discourage prospective students, and hence they may look for alternative options.

26. Actual Gap Between Submitting Application to Current Institution and Offer of a Place

Before a student can apply to enter Canada as a student, they have to show proof that a recognized educational institution has accepted them. When they have a letter of acceptance, they are able to apply for student admission to Canada at the nearest Canadian Embassy, High Commission, or Consulate. Students were asked to indicate the length of time it took for them to receive an offer of a place after first applying. The following table shows the results.

Time after submitting application received an offer

	Total	Type of student							Country of origin			
		Undergraduate			Postgraduate	English	Vocational		Asia Pacific	Europe Americas	Other	
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Less than 2 weeks	14	9	8	11	3	21	8	9	6	15	17	
2-3 weeks after	15	15	13	18	3	18	15	16	13	16	17	6
4-6 weeks after	25	28	33	21	26	24	26	29	19	25	23	25
7-11 weeks after	10	11	6	20	28	6	11	9	19	10	13	19
12-17 weeks after	7	9	11	7	13	5	5	7		7	11	
18 weeks or more	4	3	3	3	13	2	7	7	6	4	4	25
Don't know	20	22	24	18	13	21	23	22	25	22	13	25
Invalid response		1		2								
NOT ESTABLISHED	3	1	1		3	2	5	2	13	2	1	

General Observations

- The majority of students (64%) receive an offer for a place in their university/institution, *within three months* after submitting their application. Just over half (54%) received an offer *within six weeks*.
- Shorter waits for offers tend to be more prevalent for English-language students (63% receiving offers *within six weeks*), but tend to be relatively uncommon for postgraduate students (only 32% receiving an offer *within six weeks*); in fact over half the postgraduate students (54%) waited *at least seven weeks* before receiving an offer.
- Country of origin does not seem to impact on length of time that a student waits to receive an offer for a place after submitting their application.

Comments

- Shorter waits for offers tend to be more prevalent for English-language students. The impact of the quick response to English Language student application submission would benefit from exploration, as it may show as a major advantage to these students.

27. Acceptable Gap Between Application Submission to Current Institution and Offer of a Place

Time it should take between submitting an application and receiving offer of a place

	Total	Type of student								Country of origin		
		Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Less than 2 weeks	24	21	20	23	8	34	11	11	13	27	17	13
2-3 weeks after	28	26	28	23	26	29	34	42	13	29	23	19
4-6 weeks after	28	35	33	38	41	20	38	31	56	25	39	44
7-11 weeks after	6	6	6	7	13	5	3	2	6	6	8	6
12-17 weeks after	1	1	1			1	2	2		2	1	
18 weeks or more						1						
Don't know	10	11	11	10	10	8	8	9	6	9	12	19
NOT ESTABLISHED	3	1	1		3	1	3	2	6	2		

Time after submitting application received an offer

	Less than 2 weeks	2-3 weeks after	4-6 weeks after	7-11 weeks after	12-17 weeks after	18 weeks or more	Don't know	Invalid response	NOT ESTABLISHED
RESPONDENTS	81	86	140	58	40	24	114	2	19
	100	100	100	100	100	100	100	100	100
Time it should take between submitting an application and receiving offer of a place									
Less than 2 weeks	69	36	16	12		17	13		
2-3 weeks after	15	47	36	22	13	21	26		
4-6 weeks after	7	9	39	43	48	42	25	50	21
7-11 weeks after		2	4	19	28	8	4		
12-17 weeks after					8	8	2		5
18 weeks or more			1		3				
Don't know	7	5	4	3	3	4	30		
Invalid response	1							50	
NOT ESTABLISHED		1							74

General Observations

- Generally, even though only 54% of the students waited *six weeks or less* between application submission to current institution/university and offer of a place, at least three-quarters of the students (80% overall) think it should take *no more than six weeks* after submitting an application to receive an offer of a place.
- When comparing the actual time and acceptable time taken after submitting an application to receive an offer of a place it indicates, that the proportion of students who think it should take less time tends to escalate, as the gap between time of submission and receiving an offer grows. In particular:
 - ♦ Only 47% of the students who waited *2-3 weeks* before receiving an offer are satisfied with this waiting period – while 36% consider it too long.
 - ♦ Only 39% of the students who waited *4-6 weeks* before receiving an offer are satisfied with this waiting period – while 52% consider it too long.
 - ♦ Only 19% of the students who waited *7-11 weeks* before receiving an offer are satisfied with this waiting period – while 77% regard it as too long.
 - ♦ Only 8% of the students who waited *12-17 weeks* before receiving an offer are satisfied with this waiting period – while 89% consider it too long.
 - ♦ None of the students who waited *18 weeks or more* before receiving an offer are satisfied with this waiting period.

Furthermore, although indications of dissatisfaction with waiting periods are evident for all types of students, they are especially evident in relation to postgraduate students – even though 32% waited *six weeks or less*, as many as 75% think it should only take this amount of time. Similarly, particular dissatisfaction with waiting periods are especially evident in relation to second year undergraduate students – even though 50% waited *six weeks or less*, as many as 84% think it should only take this amount of time.

Comments

- The proportion of students who think it should take no more than six weeks after submitting an application to receive an offer of a place is much greater than the proportion of students who actually received it within this period (80% compared with 54% respectively). This implies that a considerable proportion of students are not satisfied with the period of time they have to wait for their application to be approved. Prospective students are quite likely to become discouraged by lengthy administrative waits when applying for university placements, and hence may look for alternative options, even though British Columbia may have been their preferred study destination.

- There appears to be an association between length of time of application submission and offer of a place, and likelihood of student considering the time period to be acceptable. This suggests that the longer it takes after submitting an application to receive an offer of a place, the greater the proportion of dissatisfied students.
- The apparent dissatisfaction amongst the majority of postgraduate students and second year undergraduate students regarding waiting periods between application submission and offer of a place are of particular concern.

28. Actual Gap Between Visa Application and Acquisition

Time after application for Canadian visa before it came

	Total	Type of student							Country of origin			
		Undergraduate		Postgraduate	English	Vocational		Asia Pacific	Europe Americas	Other		
		Total	1st yr	2nd yr		Total	1st yr	2nd yr				
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Less than 2 weeks	15	11	8	16	21	17	11	13	6	12	31	
2-3 weeks after	17	20	16	26	13	15	18	24		15	23	25
4-6 weeks after	21	26	27	26	26	17	26	27	25	21	21	38
7-11 weeks after	10	11	13	8	8	11	7	4	13	10	11	13
12-17 weeks after	9	9	10	7	13	10	7	7	6	11	2	
18 weeks or more	13	11	13	7	8	14	16	16	19	15	2	19
Not applicable	2	1	1	2		3	2		6	2	3	
Don't know	10	10	11	8	8	11	11	9	19	12	3	
NOT ESTABLISHED	3	1	1		5	2	2		6	1	2	6

General Observations

- Only approximately half of the students (53%) waited *six weeks or less* before obtaining their visa, with about one-third (32%) waiting *no more than three weeks*.
- The length of time students have to wait after applying for a visa to obtain one varies amongst the different types of students – with second year undergraduates tending to wait the shortest time (42% receiving it *within three weeks*, and as many as 68% receiving it *within six weeks*). In contrast, second year vocational students seem least likely to receive it quite promptly (only 6% receiving it *within three weeks* and only 31% receiving it *within six weeks*).
- The length of time students have to wait after applying for a visa to obtain one varies amongst Asian/Pacific students and European/American students. Asian/Pacific students tend to wait much longer than European/American students do, to receive their visa – with 27% of Asian/Pacific students compared with 54% of European/American students receiving it *within three weeks*. Similarly, while only 48% of Asian/Pacific students received their visa *within six weeks*, as many as 75% of European/American students had done so.

Comments

- Long delays in the visa application process can contribute to student dissatisfaction and it is likely that visa regulations impact on the flow of international students.
- Delays tend to be shorter for second year undergraduates, and particularly for European/American students, when applying for visas. This could be a potential advantage for students from this destination over other study destinations, which could be used to encourage the flow of European/American students, and also second year undergraduate students to Canada/British Columbia.
- The long delay, which tends to be experienced by second year vocational students, and particularly by Asian/Pacific students, indicates potential problem areas in this process, which could be creating obstacles and hindering the flow of these kinds of international students to Canada/British Columbia.

29. Acceptable Gap Between Visa Application and Acquisition

Time it should take to receive visa

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Less than 2 weeks	34	38	36	43	33	35	25	24	25	31	49	56
2-3 weeks after	23	28	27	31	13	19	33	38	19	23	28	6
4-6 weeks after	18	15	14	15	26	20	16	16	19	20	13	
7-11 weeks after	8	8	8	8	5	7	13	9	25	9	1	6
12-17 weeks after	5	3	6			6	7	9		5	2	6
18 weeks or more	2	1	1		5	2	2	2		2		6
Not applicable	2	1		2		2	2	2		1	3	
Don't know	6	5	8	2	10	7				6	1	13
NOT ESTABLISHED	3	1	1		8	2	3		13	2	2	6

Time after application for Canadian visa before it came

	Less than 2 weeks	2-3 weeks after	4-6 weeks after	7-11 weeks after	12-17 weeks after	18 weeks or more	Not applicable	Don't know	Invalid response	NOT ESTABLISHED
RESPONDENTS	82	94	120	59	52	72	11	57	1	16
	100	100	100	100	100	100	100	100	100	100
Time it should take to receive visa										
Less than 2 weeks	85	49	28	14	10	15	36	21		13
2-3 weeks after	7	36	38	36	10	6	9	19	100	6
4-6 weeks after	2	11	27	22	29	26		19		
7-11 weeks after			1	15	27	24		7		
12-17 weeks after			1	5	15	18		4		
18 weeks or more		1		2	6	4		4		
Not applicable			2	2	2		45			
Don't know	2	3	3	2	2	7	9	26		
NOT ESTABLISHED	2		1	3						81

General Observations

- Generally, even though only 53% of the students waited six weeks or less, three-quarters of the students (75% overall) think it should take *no more than six weeks* after submitting an application to receive a visa, in fact 57% think it should take *three weeks or less* to receive one.
- When comparing the actual time and acceptable time taken after submitting an application to receive a visa, it indicates that the proportion of students who think it should take less time tends to escalate, as the gap between time of submission and receiving a visa grows. In particular:
 - ♦ Only 36% of the students who waited *2-3 weeks* before receiving a visa are satisfied with this waiting period – while 49% consider it too long.
 - ♦ Only 27% of the students who waited *4-6 weeks* before receiving a visa are satisfied with this waiting period – while 66% consider it too long.
 - ♦ Only 15% of the students who waited *7-11 weeks* before receiving a visa are satisfied with this waiting period – while 72% consider it too long.
 - ♦ Only 15% of the students who waited *12-17 weeks* before receiving a visa are satisfied with this waiting period – while 76% consider it too long.
 - ♦ Only 4% of the students who waited *18 weeks or more* before receiving a visa are satisfied with this waiting period – while 89% consider it too long.
- Furthermore, although indications of dissatisfaction with waiting periods are evident for all kinds of students, they are especially evident in relation to second year vocational students – even though only 31% waited *six weeks or less*, as many as 63% think it should only take this amount of time.
- However, even though European/American students tended to have shorter waits for visas, than Asian/Pacific students did, a greater proportion of European/American students were dissatisfied with their waiting periods. Altogether, 54% of European/American students waited *three weeks or less*, and 77% of these kinds of students think it should only take this amount of time, and as many as 49% want it to take *less than two weeks* to process). In contrast, even though only 27% of Asian/Pacific students waited *three weeks or less*, only 54% of these students think it should only take this amount of time.

Comments

- The proportion of students who think it should take no more than six weeks after submitting a visa application to receive a visa is much greater than the proportion of students who actually received it within this period (75% compared with 53% respectively). This implies that a considerable proportion of students are not satisfied with both the period of time they have to wait for their institutional place offer and, also to a slightly lesser extent, the time they

have to wait for their visa. Prospective students are quite likely to become discouraged by lengthy administrative waits when applying for either university placements, and/or their visa to come through, and hence may look for alternative options, even though British Columbia may have been their preferred study destination.

- There appears to be an association between time gap of visa application and receiving it, and likelihood of student considering the time period to be acceptable. This suggests that like the application to receive an offer for a place at a university/institution, the longer it takes after submitting an application to receive a visa, the greater the proportion of dissatisfied students.
- The apparent dissatisfaction amongst the majority of second year undergraduate students regarding waiting periods both between application submission and offer of a place, and also between application submission and offer of a visa are of particular concern.
- However, even though shorter waits for visas were more prevalent for European/American students than for Asian/Pacific students, European/American students tend to want the waiting periods to be shorter, indicating potential problem areas in this process, which could be creating obstacles and hindering the flow of European/American students to Canada/British Columbia.

30. Extent to which Institutions Meet Student Expectations

Understanding student expectations and then meeting or exceeding them is fundamental to creating student satisfaction and loyalty. Students become satisfied only when an experience at least meets or, better still, exceeds their expectations. Students become delighted, if their expectations are exceeded. Hence, to expect recurrent loyalty and high recommendations, students' expectations will need to be surpassed.

Students were asked to indicate from a range of options, the extent to which their current institution has met their expectations for international study. A five-point scale has been utilized on which respondents were asked to rate their current institution as much better than expected, better than expected, the same as expected, worse than expected or much worse than expected. This approach to measuring satisfaction against expectations helps to isolate the drivers of satisfaction and dissatisfaction.

This phase of the decision-making process can also provide insight into the extent British Columbian post secondary education institutions can expect recurrent loyalty and high recommendations from their students.

Overall rating of how institution met expectations

	Total	Type of student							Country of origin			
		Undergraduate			Postgraduate	English	Vocational		Asia Pacific	Europe Americas	Other	
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Better (net)												
Total	33	37	32	44	41	23	51	56	38	31	49	25
Much better than expected	10	9	6	13	13	8	13	11	19	9	17	13
Somewhat better than expected	23	28	27	31	28	16	38	44	19	22	32	13
The same as expected	31	34	32	38	28	31	28	24	38	33	28	38

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Worse (net)												
Total	22	19	23	13	21	29	13	13	13	24	14	19
Somewhat worse than expected	17	14	14	13	21	23	10	9	13	18	12	19
Much worse than expected	5	5	9			6	3	4		5	2	
Can't comment/haven't been here long enough to say	10	8	10	5	8	15	5	4	6	11	8	19
Invalid response	1	1	1				2	2		1		
NOT ESTABLISHED	2	1	1		3	2	2		6	1	1	

Overall rating of how institution met expectations

	Total	Time in Canada			
		Less than 6 months	6 mths - 1 yr	1 yr - 2 yrs	More than 2 years
RESPONDENTS	564	282	105	97	61
	100	100	100	100	100
Better (net)					
Total	33	32	32	32	48
Much better than expected	10	11	10	10	8
Somewhat better than expected	23	21	23	22	39
The same as expected	31	31	28	35	33
Worse (net)					
Total	22	23	29	22	11
Somewhat worse than expected	17	18	22	18	8
Much worse than expected	5	5	7	4	3
Can't comment/haven't been here long enough to say	10	13	10	9	5
Invalid response	1			1	3
NOT ESTABLISHED	2	1	2	1	

General Observations

- Generally, the majority of students in all destinations are not overly satisfied with their institution: although only 22% consider their experience with their institution to be *worse than expected*, only one-third of the students (33%) consider it at least *slightly better than expected*.
- Furthermore, only 10% of the students think their expectations have been exceeded (i.e. *much better than expected*) implying that hardly any of the students highly regard their institution.

- It is noteworthy that students who have been in Canada for at least two years show a greater tendency than students who have been there for a shorter period to be satisfied with their institution. As many as 48% of the students who have been in Canada for at least two years, compared with only 32% of the others, think their experience with their institution is, at least *slightly better than expected*.
- Furthermore, Asian/Pacific students seem less inclined than European/American students do, to be satisfied with their institution. As many as 49% of European/American students (compared with only 31% of Asian/Pacific students) think their experience with their institution is at least *slightly better than expected*.
- English Language students have a lower tendency to be satisfied with the extent that their institution has met their expectations for international study. Only 23% of these students (compared with 33% overall) think that their institution performs at least *slightly better than expected*. Furthermore, 29% of the English-language students, think that their tertiary institution is *worse than expected*, hence implying that they are disappointed.
- In contrast, second year undergraduates, postgraduate students and first year vocational students seem most inclined to think that their expectations are *exceeded*. Nearly half of the second year undergraduates (44%), postgraduate students (41%), and more than half of the first year vocational students (56%), think that their institution has exceeded their expectations.

Comments

- Hardly any of the students (10%) think their expectations regarding their institution have been exceeded, while in total, just on one-third of the students (33%) consider it at least slightly better than expected. This indicates that British Columbian post secondary education institutions will need to improve tremendously before they can expect recurrent loyalty and high recommendations from students.
- It is of concern that 22% of all students have unmet expectations regarding their institution. This issue needs addressing, as these students could potentially become defectors and will most likely not recommend their institution.
- Currently students who have been in Canada for at least two years, and European/American students seem to be the greatest stalwarts of their institution. Similarly second year undergraduates, postgraduate students and first year vocational students tend to be reasonably good stalwarts.
- In contrast, Asian/Pacific students and English Language students seem to be the most likely defectors.

- European/American students, not only tend to be better informed overall by their institution, they are also more likely to be satisfied than Asian/Pacific students are with their institution. This suggests a possible association between information adequacy and extent of satisfaction. It implies that the more informed a student is about their institution, then the greater the likelihood of the institution exceeding student expectations.

31. Ways in which Institutions are Worse Than Expected

The 124 students who considered their institution to be worse than expected were asked to indicate ways they considered this to be so.

Ways institution was worse than expected

	Total	Type of student							Country of origin			
		Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	124	29	21	8	8	77	8	6	2	107	13	3
	100	100	100	100	100	100	100	100	100	100	100	100
Poor teaching/boring classes												
Total	30	24	29	13	50	32	13	17		31	31	
Bad teachers/quality of teaching is poor	15	14	14	13	50	13				14	23	
English not taught properly	12	7	10		13	14	13	17		14		
Boring class	6	7	10			6				6	8	
Classes/course												
Total	19	3	5		25	25	25	17	50	19	31	
Classes are too big/too many students in classes	7					12				7	8	
Only a very limited range of courses available	7	3	5		25	5	25	17	50	7	15	
Too few classes/only 3 levels	5					8				6		
Takes too long to finish course(s)	2					4				2	8	
Student composition												
Total	11	10	10	13		13				12	8	
Too many students from same country/Too many Asians	6	3		13		9				7		
Too many students from same country undermine opportunities to practise English	6	7	10			5				6	8	
Admin./resources												
Total	23	28	29	25	38	17	38	50		23	23	
Unhelpful/disorganized administration	10	10	10	13	38	5	38	50		9	23	
Lack of resources/facilities	8	14	14	13	38	4				7	23	
Institution is too small	6	3	5			9				7		
Difficult to transfer to another college	2					1				2		

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Social												
Total	8	14	10	25		6	13	17		6	31	
Too few social activities on Campus	2	7		25			13	17		1	15	
Campus is in remote location/public transport to towns is poor	2					4				3		
Culture shock/everything is so different from home	2	3	5			1					15	
Too parochial/provincial/small town	2	3	5			1				2		
Not answered	18	28	24	38	25	13	25	33		16	15	67
Other	12	7	10			16	13		50	12	8	33

General Observations

- Generally, the students who rate their institution as *worse than expected* gave a wide range of reasons why they consider this so.
- Nonetheless, the most frequently mentioned reasons relate to factors concerning *poor teaching/boring classes*. Altogether, 30% of the students who rate their institution as *worse than expected* give their institution this poor rating because of these kinds of factors.
- The next most frequently mentioned reasons relate to factors concerning *administration/resources*. In total, 23% of the students who rate their institution as *worse than expected*, give their institution this poor rating because of these kinds of factors.
- However postgraduate students who rate their institution as *worse than expected*, have a much higher tendency than other kinds of students who rate it this way, to attribute their poor perception of their institution to factors concerning *poor teaching/boring classes*, or to factors concerning *administration/resources*. Altogether 50% of these postgraduate students compared with 30% overall, refer to *poor teaching/boring classes*, while 38% of these postgraduate students compared with 23% overall, referred to factors concerning *administration/resources*, as reasons for their poor perception of their institution.
- It is also pertinent that European/American students who rate their institution as *worse than expected*, have a greater tendency than Asian/Pacific students who rate their institution so poorly, to attribute this to factors concerning *classes/courses*, and/or *social factors*. Nearly one-third of European/American students (31%) compared with only 19% of Asian/Pacific students, who rate their institution as *worse than expected*, attribute their poor perception to factors concerning *classes/courses*. Similarly nearly one-third of European/American students (31%), compared with only 6% of Asian/Pacific students who rate their institution as *worse than expected*,

attribute their poor perception to *social factors*. European/American students also have a more prominent disliking to *the quality of teaching, unhelpful disorganized administration, and lack of resources/facilities*.

Comments

- The particular problem of poor teaching/boring classes, particularly in relation to postgraduate courses, needs tackling as this may be a driver for dissatisfaction for students.
- The notable variation between different kinds of students in relation to their perceptions of deficiencies of the institutions, further suggests that there are different value systems for Asian/Pacific students than for European/American students. Even though Asian/Pacific students seem much less inclined than European/American students do, to be satisfied with their institution, European/American students tend to have higher expectations about aspects such as classes/courses, and social factors. They also seem to have higher expectations about the quality of teaching, the administration, and resources/facilities.

Section E - Receptiveness of British Columbia/Canada

Having completed the pre-purchase decision-making stages, the concluding stage, which is post-purchase evaluation, needs to be determined. This final phase of the decision process concerns satisfaction with the disposition of the product, the product in this case being British Columbian/Canadian post-secondary education.

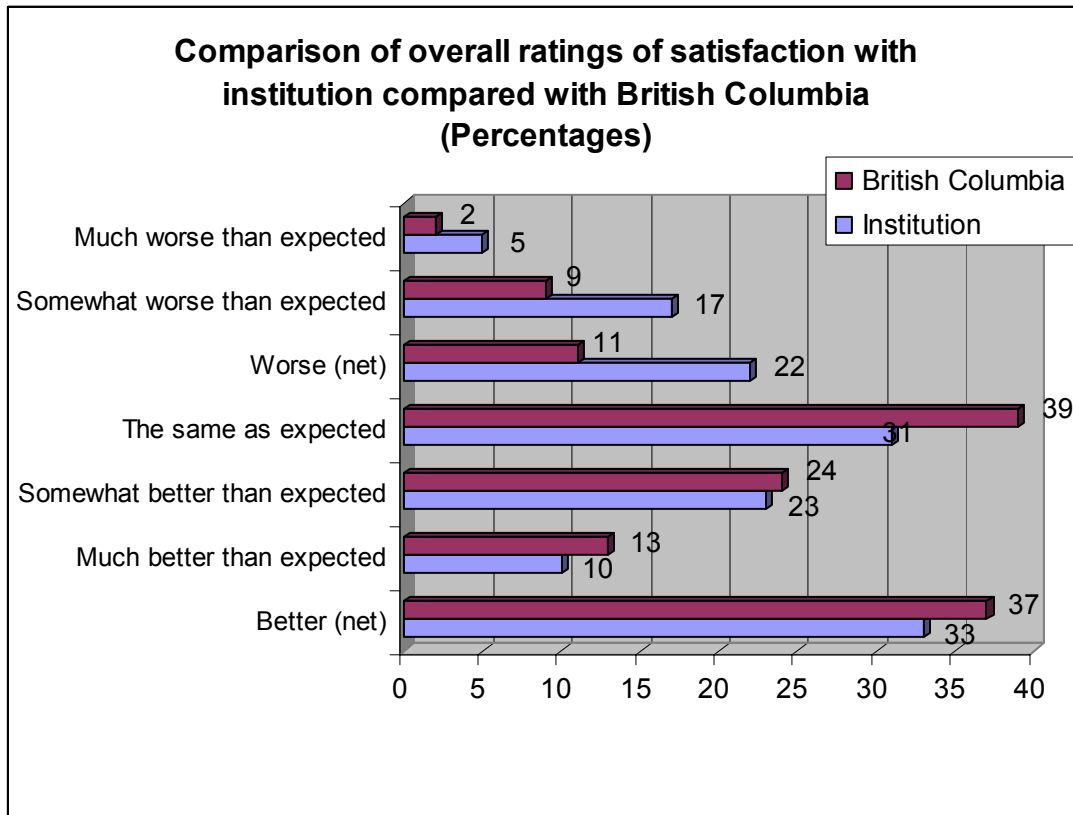
This section examines the relative performance of British Columbia.

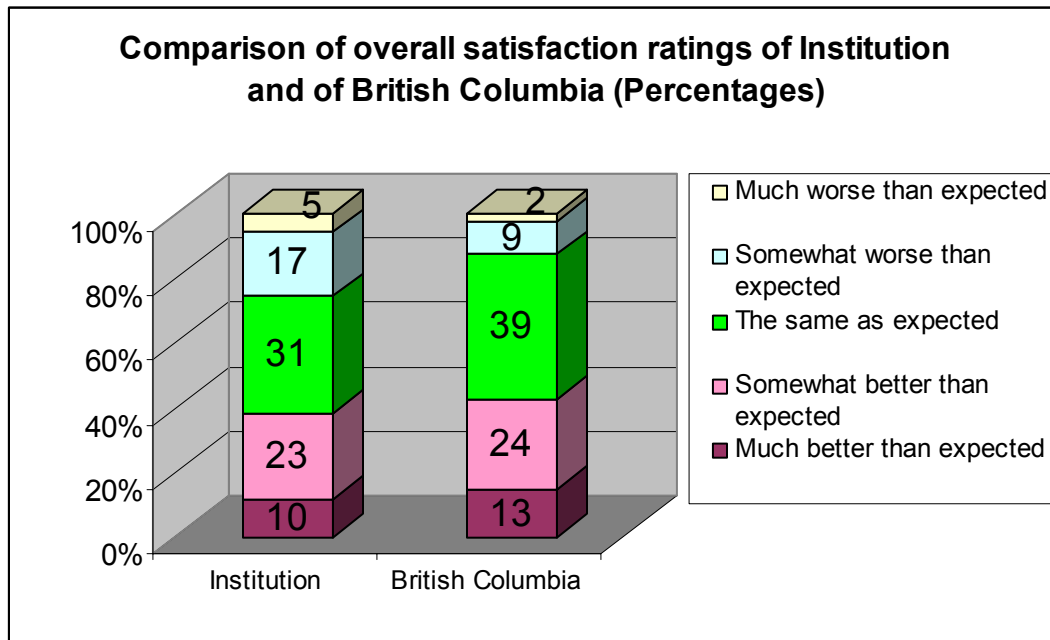
32. Extent to which British Columbia/Canada Meets Student Expectations

Understanding student expectations and then meeting or exceeding them is fundamental to creating student satisfaction and loyalty. Students become satisfied only when an experience meets or, better still, exceeds their expectations. Students become delighted, if their expectations are exceeded. Hence, to expect recurrent loyalty and high recommendations, students' expectations need to be surpassed.

Students were asked to indicate from a range of options, the extent to which British Columbia has met their expectations for international study. A five point scale has been utilized on which respondents were asked to rate their experience studying in British Columbia as; much better than expected, better than expected, the same as expected worse than expected or much worse than expected. This approach to measuring satisfaction against expectations helps to isolate the drivers of satisfaction and dissatisfaction.

This phase of the decision-making process can also provide insight into the extent British Columbia can expect recurrent loyalty and high recommendations from its international students.





Overall rating of how studying in British Columbia met expectations

	Total	Time in Canada			
		Less than 6 months	6 mths - 1 yr	1 yr - 2 yrs	More than 2 years
RESPONDENTS	564	282	105	97	61
	100	100	100	100	100
Better (net)					
Total	37	36	37	32	54
Much better than expected	13	12	15	11	20
Somewhat better than expected	24	24	22	21	34
The same as expected	39	38	40	49	31
Worse (net)					
Total	11	9	13	13	11
Somewhat worse than expected	9	6	11	12	8
Much worse than expected	2	3	2	1	3
Can't comment/haven't been here long enough to say	8	13	7	2	2
Invalid response	1	1	1		
NOT ESTABLISHED	4	4	2	3	2

General Observations

- Generally, as is the case with their institution, the majority of students in all destinations are also not overly satisfied studying in British Columbia: although only 11% consider their experience in British Columbia to be *worse than expected*, only 37% of the students rate their experience as being at least *slightly better than expected*.
- Furthermore, only 13% of the students think their expectations have been *exceeded* (i.e. *much better than expected*) implying that only a very low proportion of the students are highly satisfied with their experience in British Columbia, and will highly regard studying in this province.
- Nonetheless, as seen by the above chart, indications are that students are slightly less dissatisfied about studying in British Columbia as they are with their institution.
- It is also noteworthy that students who have been in Canada for at least two years, when compared with students who have been there for a shorter period than this, seem much more inclined to be satisfied with their experience of studying in British Columbia. As many as 54% of the students who have been in Canada for at least two years, compared with only 36% of the others, think their experience of studying in British Columbia is at least *slightly better than expected*.
- Furthermore, not only did Asian/Pacific students seem less inclined than European/American students did, to be satisfied with their institution, they also seem much less inclined to be satisfied with their experience of studying in British Columbia. As many as 58% of European/American students compared with only 33% of Asian/Pacific students think their experience with studying in British Columbia is at least *slightly better than expected*.
- It is of interest, that the majority of Asian/Pacific students do not tend to rate either their institution or their experience of studying in British Columbia as better than expected. Furthermore they tend to rate it about equal in value (31% think their institution, and 33% think their experience of studying in British Columbia is at least *slightly better than expected*).
- In contrast, European/American students tend to rate both their institution and their experience of studying in British Columbia *as better than expected*. However the ratings allocated to both of these factors tends to indicate that the experience of studying in British Columbia is even more highly regarded than their experience with their institution (49% of European/American students think their institution, and 58% think their experience of studying in British Columbia is at least *slightly better than expected*).
- English Language students not only have a much lower tendency to be satisfied with their institution, they also have a much lower tendency to be satisfied with the extent that their experience of studying in British Columbia has met their expectations for international study. Only 27% of these

students (compared with 37 overall) think that their experience of studying in British Columbia has been at least *slightly better than expected*. However, English Language students have a greater tendency than other students do, to think their experience of studying in British Columbia is the *same as expected*.

- Furthermore, English-language students have a lower tendency to be disappointed with studying in British Columbia, as they are with their institution. As many as 29% are disappointed with their institution (thinking that their experience is *worse than expected*), while only 11% are disappointed with their experience of studying in British Columbia.
- In contrast, second year undergraduates, postgraduate students and first year vocational students seem most inclined to think that their expectations regarding studying in British Columbia have been *exceeded*. Over half of either the second year undergraduates (54%), about half of the postgraduate students (49%) and the vocational students (49%) think that their expectations have been *exceeded*.
- It is of interest that second year vocational students tend to be more satisfied with their experience of studying in British Columbia, than they are with their institution. Only 38% of these students consider their experience with their institution to be *better than expected*. In contrast, nearly half (49%) consider their experience of studying in British Columbia to be *better than expected*.

Comments

- Generally, as is the case with their institution, hardly any of the students (13%) think their expectations regarding their study experience in British Columbia have been exceeded, while in total, only 37% of the students consider it at least slightly better than expected. This indicates that British Columbian international education marketing professionals will need to greatly improve both the image of the province itself, as well as its post secondary education institutions, before they can expect recurrent loyalty and high recommendations from students. Even though, indications are that students are slightly less dissatisfied about studying in British Columbia as they are with their institution, there is still a great need for British Columbia to improve the experiences of international students living there.
- However, students who have been in Canada for at least two years are more inclined than those who have been there for a shorter period than this, to be satisfied with their experience of studying in British Columbia. This implies that students tend to become more satisfied as they get used to the experience of living in British Columbia, hence indicating a need to improve the early adjustment years for the international student, in order to raise their satisfaction level with living in British Columbia.

- Currently students who have been in Canada for at least two years, and European/American students seem to be the greatest advocates of their institution. They also tend to be the greatest ambassadors of the province of British Columbia. In particular, the majority of European/American students (58%) tend to be quite satisfied with their experience of studying in British Columbia, and 28% tend to be very satisfied about it.
- In contrast, Asian/Pacific students and students who had only been in the province for a short time seem to be the most likely defectors. British Columbian international education marketing professionals need to take particular note that, unlike European/American students, only a minority of Asian/Pacific students tend to rate either their institution (31%) or their experience of studying in British Columbia (33%) as better than expected. Furthermore, hardly any of Asian/Pacific students (10%) rate their experience in British Columbia as much better than expected, and hence are considered to be ecstatic about it.
- European/American students, not only tend to be better informed overall, they are more likely to be satisfied, than Asian/Pacific students are, with both their institution and with their experience of living in British Columbia.
- The likelihood of retention of English Language students is of particular concern here. Not only do they have a much lower tendency to be satisfied with their institution, they also have a much lower tendency to be satisfied with the extent that their experience of studying in British Columbia has met their expectations for international study.

33. Ways in which British Columbia did Not Meet Expectations

The 61 students who considered studying in British Columbia to be worse than expected were asked to indicate ways they considered this to be so.

Ways studying in British Columbia was worse than expected

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
RESPONDENTS	61	20	14	6	2	30	8	7	1	56	5	
	100	100	100	100	100	100	100	100	100	100	100	
Too many (other) Asians - little opportunity to practice English	16	10	14			20	13	14		16	20	
Difficult to get into college of choice	16	25	21	33		7	38	29	100	18		
Inconvenient/bad transportation system	11	10	14		50	13				11	20	
Boring life/nothing to do/few activities/few opportunities	11	10	14			13	13	14		7	60	
Hard to learn/improve English skills	8				50	10	13	14		9		
People are unfriendly/aloof/hard to become friends with Canadians	8	5	7			7	25	29		7	20	
Small town/provincial/parochial	5				50	7				5		
High fees/school fees	5	5		17		7				5		
High taxes	3					7				4		
Hard to find work	3	5	7			3				4		
Other	16	10	14		50	20	13	14		18		
It wasn't worse than expected/good here	20	30	14	67		17	13	14		20	20	

General observations

- Generally, the students who rate studying in British Columbia as *worse than expected* gave a wide range of reasons why they consider this as such.
- Although by no means outstanding, the *lack of opportunity to practice English*, and/or *difficulties in getting into the college of ones choice* tend to be the most frequently mentioned reasons why the students who rate studying in British Columbia as *worse than expected* consider this to be so. In total 16% of the students who rate studying in British Columbia as *worse than expected* refer to either the *lack of opportunity to practice English* (most of these students

are Asian/Pacific students and/or English Language students); and/or the *difficulties in getting into the college of ones choice* as reasons for their poor ratings.

Comments

- The particular problem of the lack of opportunity to practice English, particularly in relation to English Language courses, and Asian/Pacific students, needs tackling as this may be a major driver for dissatisfaction for students, which may be preventing them from becoming “ambassadors” for British Columbia.

34. Likelihood of Recommending Studying in British Columbia

Students were asked to indicate from a range of options, whether they would recommend studying in the province of British Columbia as an international study destination to other students/friends in their home country. A five point scale has been utilized on which respondents were asked to rate their likelihood of recommending British Columbia as; definitely yes, probably yes, undecided/not sure, probably not, or definitely not. This phase of the decision-making process can also provide insight into the extent British Columbia can expect recurrent loyalty and high recommendations from its international students. The following table shows their responses.

Would recommend studying in British Columbia as an overseas study destination

		Time in Canada			
		Total	Less than 6 mths	6 mths - 1 yr	1 yr - 2yrs
Total	564	282	105	97	61
	100	100	100	100	100
Yes (net)					
Total	73	74	71	71	85
Definitely yes	33	34	30	28	43
Probably yes	40	40	41	43	43
Undecided/not sure	16	15	20	19	8
No (net)					
Total	4	4	5	7	3
Probably not	3	3	5	5	
Definitely not	1	1		2	3
Can't comment/haven't been here long enough to say	4	6	2	2	3
NOT ESTABLISHED	3	2	2	1	

Would recommend studying in British Columbia as an overseas study destination

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Yes (net)	73	75	70	84	82	71	72	71	75	70	91	88
Definitely yes	34	42	36	51	51	22	38	31	56	27	66	50
Probably yes	40	34	34	33	31	49	34	40	19	44	26	38
Undecided/not sure	16	13	17	8	10	19	16	18	13	19	2	
No (net)	5	3	6			5	10	11	6	23	2	
Probably not	3	2	3			4	7	7	6	4	1	
Definitely not	1	1	2			1	3	4		1	1	
Can't comment/haven't been here long enough to say	4	6	4	8	5	5				4	3	13
NOT ESTABLISHED	3	2	3		3	1	2		6	2	1	
TOTALS	100	100	100	100	100	100	100	100	100	100	100	100

Would recommend studying in British Columbia as an overseas study destination

	Time in Canada				
	Total	Less than 6 mths	6 mths - 1 yr	1 yr - 2yrs	Less than 2 years
RESPONDENTS	564	282	105	97	61
	100	100	100	100	100
Yes (net)	73	74	71	71	85
Definitely yes	33	34	30	28	43
Probably yes	40	40	41	43	43
Undecided/not sure	16	15	20	19	8
No (net)	25	11	5	7	2
RESPONDENTS	4	4	5	7	3
Probably not	3	3	5	5	
Definitely not	1	1		2	3
Can't comment/haven't been here long enough to say	4	6	2	2	3
NOT ESTABLISHED	3	2	2	1	

General observations

- Although the majority of students (74%) think that there is at least some likelihood that they will *recommend* studying in British Columbia, only 34% think they will *definitely recommend* it. This further suggests that students are hesitant to highly regard studying in this destination.
- Nonetheless, only 5% of the students think they are *not likely to recommend* this experience, suggesting that it is still definitely worthwhile using word of mouth via current students as a marketing source.
- Students who have been in British Columbia for at least two years have a far greater tendency than students who have been there for shorter periods than two years, to *recommend* (and *most definitely recommend*) studying in British Columbia. As many as 85% of Students who have been in British Columbia for at least two years, compared with about three-quarters overall, will *recommend* the experience. Furthermore, nearly half of the students (43%) who have been in British Columbia for at least two years, compared with only about one-third overall, will *definitely recommend* it.
- Furthermore, contrasts between the various types of students also are noteworthy. In particular, second year undergraduate students and postgraduate students have a greater tendency than other kinds of students do to *recommend* studying in British Columbia. Altogether 84% of the second year undergraduate students and 82% of the postgraduate students (compared with 75% of the undergraduates, 71% of the English Language students, and 72% of the vocational students) indicate that they will *recommend* the experience.
- Of particular note are the greater inclinations of second year undergraduate students and postgraduate students to *definitely recommend* the experience (about half of the students in either of these groups indicating that they will *definitely recommend* it). In contrast, English Language students have a much lower tendency than other types of students do, to *definitely recommend* the experience. Only 22% of the English Language students indicate that they will *definitely recommend* it.
- Noteworthy contrasts between Asian/Pacific students and European/American students are also evident – with European/American students showing a much greater inclination to recommend this experience. Nearly all European/American students, compared with only 70% of Asian/Pacific students, indicate that they will *recommend* the experience. Of particular note is the greater inclinations of European/American students to *definitely recommend* the experience (66% compared with only 27%), indicating that while the majority of European/American students will *definitely recommend* studying in British Columbia, only a minority of Asian/Pacific students in comparison, will tend to do so.

Comments

- It is encouraging that the majority of students (73%) think that there is at least some chance that they will recommend studying in British Columbia. This suggests that it is still definitely worthwhile using current students as a marketing source, as “ambassadors” for the experience of studying in British Columbia.
- However, given that only 34% of the current students will definitely recommend the experience, indicating that students are hesitant to highly commend studying in this destination. This is not surprising given the extremely low proportion of students overall who think their expectations regarding their institution (10%) or their study experience in British Columbia (13%) have been exceeded. These findings substantiate previous findings, which suggest that the experience that students tend to get whilst studying in British Columbia, and its institutions, will still need to improve before recurrent loyalty and high recommendations can be expected from current students.
- The impact of length of time in British Columbia on likelihood of recommending the experience is worth taking into account. It appears that not only do students tend to become more satisfied as they get used to the experience of living in British Columbia, they also then seem to have a greater tendency to recommend it. This finding adds weight to the previous indication that there is a need for improvement in the early adjustment years for the international student, in order to raise their satisfaction level with living in British Columbia.
- A similar pattern emerges when considering contrasts between Asian/Pacific students and European/American students - with European/American students showing a much greater inclination to recommend this experience. This finding is not surprising given that European/American students tend to be better informed overall and more likely to be satisfied, than Asian/Pacific students are, with their institution, and with their experience of living in British Columbia. Of particular note is the greater inclinations of European/American students to definitely recommend the experience (66% compared with only 27%), indicating that while the majority of European/American students will definitely recommend studying in British Columbia, a comparatively smaller proportion of Asian/Pacific students will tend to do so.
- Nonetheless, given that the majority of Asian/Pacific students did not have their expectations exceeded regarding either their institution or their experience studying in British Columbia, it is surprising that as many as 70% of Asian/Pacific students indicate that they, at least, may possibly recommend the experience. This suggests that there could be other factors that may be drawing current Asian/Pacific student’s loyalty.
- A similar pattern emerges when considering contrasts between the various kinds of students – with the same kinds of students who tend to be satisfied with their institution, and with their experience of studying in British Columbia,

also showing a much greater inclination to recommend this experience. In particular, second year undergraduate students and postgraduate students have a greater tendency than other kinds of students do, to recommend studying in British Columbia. This finding is not surprising given that these kinds of students tend to be better informed overall and more likely to be satisfied, than other kinds of students are, with their institution, and with their experience of living in British Columbia.

- Further concerns regarding the likelihood of retention of English Language students are reflected in the findings in relation to probability of recommending the experience of studying in British Columbia. Given that they have a much lower tendency to be satisfied with their institution, and with the extent that their experience has met their expectations for international study, it is not surprising that English Language students also have an even lower tendency than other types of students do, to definitely recommend the experience (22% compared with 33% overall).

35. Perceived Strengths of Studying in British Columbia

In order for British Columbian international education marketing professionals to gain insight into how their province is set apart from other study destinations, students were asked to indicate the strengths they think British Columbia has. This question enables British Columbian international education marketing professionals to gain some understanding about attributes, which may be influencing students to favor studying in British Columbia rather than other study destinations. This will then assist British Columbian international education marketing professionals in making informed strategy moves by finding out which of its components are most greatly valued. The following table shows the most frequently mentioned strengths.

Likes/strengths of British Columbia

	Total	Type of student								Country of origin		
		Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100

Nature/Environment/Natural Features

Total	66	70	66	75	69	65	70	69	75	67	70	50
Beautiful scenery/ environment/nature	47	52	44	64	51	41	56	51	69	45	60	31
Good climate/weather	32	32	31	33	41	31	38	36	44	34	27	25
Conducive to outdoor sporting activities	8	13	6	23	8	3	10	13		6	20	13
Fresh, clean air	2	2	2	2		2	5	4	6	3		
Many beautiful parks	1	1		2		2	2		6	1	2	

Society

Total	27	28	33	21	28	27	28	24	38	27	29	31
Safe place/low crime rate	7	5	7	3	8	11	3	4		8	8	
Good relaxed lifestyle	7	6	8	3	8	7	11	9	19	7	9	13
Good public transport system	4	3	3	3	5	3	7	4	13	4	2	6
Cheap	4	5	7	2	3	3	5	4	6	4	6	
Good services/ facilities	3	6	8	3	5	1	5	4	6	3	1	19
Good social scene/ entertainment/lots to do	3	2	2	2	5	3	2		6	3	7	
Clean place	3	3	2	5	3	3	2	2		3	3	

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	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
People												
Total	35	42	37	51	41	27	46	42	56	32	52	38
Kind, polite friendly people	28	33	24	46	36	23	33	29	44	24	51	31
Multicultural	9	13	14	10	10	4	20	20	19	10	6	13
Good English spoken	1					2				1		
Education												
Total	18	21	22	20	15	16	18	18	19	17	22	25
Quality of education system	12	15	17	13	13	10	15	13	19	12	10	25
Good schools/universities	3	4	3	5	3	3	2	2		2	10	
Many universities/diversity/choice	2	1	2		3	3	2	2		3	1	
Famous universities	2	2	2	2	3	3				2	2	
Other												
Close/closest to Asia	2	2	2	2		2	8	9	6	3		
Other	5	4	2	7	3	4	7	9		5	6	
Not answered	13	11	11	11	13	13	8	4	19	12	7	31
Don't know	2				3	3	2	2		2	1	

General observations

- Nearly all the students can think of something they like about studying in British Columbia. Only 2% of the students did not know of any strength, while a further 13% did not respond to this question.
- British Columbia's most prominent strength, according to its students, seems to be *environmental* factors. Two-thirds of its students (66%) refer to *nature/environment/natural features* as an attribute of this particular province. In particular, the *beautiful scenery/environment/nature* stands out as a strength (mentioned by 47% of all students). The *good climate/weather* although not as prominent as the *beautiful scenery/environment/nature* also gets notable mention (cited by 32% of all students).
- It is notable that students who have been in British Columbia for a longer period (at least two years) have a greater tendency than students who have been there for a shorter period than two years do, to regard *nature/environment/natural features* as a strength (mentioned by 77% of the students who have been in British Columbia for at least two years)

- The other most commonly mentioned strength associated with British Columbia is *its people* (mentioned by 35% of respondents). In particular, the *kind, polite, friendly people* are referred to (mentioned by 28% of all students).
- It is noteworthy that only 18% of the students consider factors relating to British Columbian *education* to be one of its strengths.
- Hence ranking of top three individual strengths based on frequency of response is as follows:

Ranking	Strength	Percentage
1	Beautiful scenery/environment/nature	47%
2	Good climate/weather	32%
3	Kind, polite, friendly people	28%

- Although overall, factors relating to *nature/environment/natural features*, tend to be the most frequently mentioned strengths associated with British Columbia, second year undergraduate students seem more inclined than other kinds of students do, to refer to this factor (75% compared with 66% overall). In particular, second year undergraduate students have a much greater tendency than other kinds of students do, to refer specifically to the *beautiful scenery/environment/nature* as a strength (64% compared with 47% overall).
- Similarly, second year undergraduate students have a much greater tendency than other students do, to refer specifically to the factors relating to *the people* in British Columbia as a strength (42% compared with 35% overall). In contrast, English Language students have a much lower tendency than other students do, to refer specifically to the factors relating to *the people* in British Columbia as a strength (referred to by only 27% of the English Language students as a strength).
- Contrasts between first and second year undergraduates also differ in relation to perception of *kind, polite, friendly people* as a strength – with only 24% of the first year undergraduate students, compared with 46% of the second year undergraduate students, considering this factor as a strength.
- Asian/Pacific students and European/American students also tend to differ regarding factors they perceive to be strengths of British Columbia. In particular:
 - ♦ Even though both groups are equally likely to regard *nature/environment/natural features* as a whole as a strength, European/American students have a much greater tendency than Asian/Pacific students do to mention the following as strengths :

- *Beautiful scenery/environment/nature* (60% compared with 45%, respectively), and
 - *Conducive to outdoor sporting activities* (20% compared with 6%, respectively).
- ♦ European/American students also have a much greater tendency than Asian/Pacific students do, to specifically regard factors relating to *the people* in British Columbia as a strength (52% compared with 32% respectively). In particular, European/American students specifically refer to the *kind, polite, friendly people* far more frequently than Asian/Pacific students (51% compared with 24% respectively).

Comments

- Environmental factors, particularly its nature/environment/natural features are perceived to be British Columbia's most prominent strength. This finding suggests that this aspect could be a core equity that British Columbian international education marketing professionals should exploit in the international marketplace. In developing a database of British Columbian system expertise and marketing that expertise, British Columbia international education marketing professionals will most likely benefit by presenting environmental factors at the forefront: In particular, they would benefit by promoting aspects such as nature/environment/natural features; the beautiful scenery/environment/nature, and the good climate/weather.
- The other most commonly mentioned strength associated with British Columbia is its people. If British Columbian post secondary education institutions are to consider expanding their horizons, they will also quite possibly benefit by presenting people at the forefront, giving particular mention to the *kind, polite, friendly people* in British Columbia. European/American students have a particularly high tendency to be impressed with British Columbia's people.
- It is noteworthy that education factors are rarely considered to be a strength associated with British Columbia, even though just under two-thirds of the students referred to educational factors, as reasons for going overseas to study. This substantiates the relatively low regard held for British Columbia's education system.

36. Perceived Weaknesses of Studying in British Columbia

In order for British Columbian international education marketing professionals to gain insight into areas where the province is lagging behind other international study destinations, students were asked to indicate any weaknesses they think British Columbia has. This question enables British Columbian international education marketing professionals to gain some understanding about any deficiencies discouraging students from favoring British Columbia over other international study destinations. This information will greatly assist in uncovering possible deficiencies within the province, which may be discouraging students from choosing British Columbia and which may be inhibiting effective positioning of the province within the international education marketplace. The following table shows the most frequently mentioned weaknesses.

Dislikes/weaknesses of British Columbia

	Type of student										Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other	
		Total	1st yr	2nd yr			Total	1st yr	2nd yr				
Total	564	151	90	61	39	264	61	45	16	449	90	16	
	100	100	100	100	100	100	100	100	100	100	100	100	
Nature/climate													
Total	10	7	4	11	15	10	13	9	25	8	17	13	
Too much rain	6	5	4	5	8	7	8	2	25	6	10	13	
Bad weather/climate	2	1		2	5	3	3	4		2	6		
Too cold	2	2		5	5	1	2	2		2	2		
Socio/Economic													
Total	10	14	14	13	21	6	18	18	19	10	13	19	
Few work opportunities	5	6	7	5	13	2	10	11	6	5	3	19	
Small towns/ provincial/ parochial	2	3	2	5		1	3	4		1	4		
Inconvenient business hours/closes too early	2	2	2	2	5	2				1	4		
Overall poor economic performance (in BC)	1	2	2	2	3	0	5	4	6	2			
Strikes	1	1	1	2		1	3	2	6	1	1		
Facilities													
Total	22	25	23	28	13	23	25	24	25	22	27	6	
Poor public transport system/long commutes	13	13	7	21	8	14	13	16	6	12	17	6	
Ennui/boredom	3	6	8	3		3	2	2		4	1		
Poor social scene/little entertainment/little to do	3	3	2	5		3	8	9	6	3	3		
Casual/lazy/slow pace	3	5	8		3	2	3		13	3	1		
Not enough nightlife	2	2	3			2	2	2		1	3	6	
Not enough facilities/poor services	1	1	1		3	1				1	1		

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	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
People												
Total	12	11	14	7	5	13	18	20	13	12	9	13
Too many Asians/foreigners/inhibit opportunities to practise English	7	5	8	2		10	11	13	6	8	2	6
People are unkind/aloof/racist	2	5	7	3		1	3	2	6	2	2	6
Too many junkies/drug problems/derelects	2	1	1	2	5	2	3	4		2	4	
Education												
Total	8	14	16	11		7	10	7	19	9	7	6
High tuition fees	4	8	8	8		3	7	2	19	5	3	
Not enough universities/school/limited choice	2	3	4	2		2	2	2		2		6
Poor quality educational system	2	3	3	3		1	2	2		2	3	
Universities are average	1	2	2	2		1				1	1	
Cost of living												
Total	16	15	17	13	18	17	15	16	13	17	12	6
High tax	9	9	10	7	5	11	7	7	6	11	1	
Expensive/cost of living high	9	9	10	8	13	7	8	9	6	8	11	6
Don't know	5	1	1	2	8	8				5	3	
Other	8	8	9	7	15	6	8	11		6	19	13
Not answered	29	25	21	31	21	31	25	22	31	27	30	50

General observations

- Generally, students who are able to think of aspects they dislike about studying in British Columbia mention a wide range of aspects. Furthermore, specific strengths seem to be more identifiable than factors considered to be specific weaknesses.
- Nonetheless, the most frequently mentioned weakness/dislike relates to factors concerning *facilities*. These kinds of factors are referred to by 22% of its students as a deficiency of this particular province. In particular, the *poor public transport system/commuting long distances* are referred to (mentioned by 13% of all students as a weakness).

- Although not of great prominence, it is noteworthy to draw attention to the fact that the next most commonly mentioned weakness associated with British Columbia relates to factors concerning the *cost of living* (mentioned by 16% of respondents).
- It is interesting that postgraduate students stand out in that they have a greater tendency than other types of students to dislike *socio-economic* factors, but a lower tendency to dislike *the facilities* in British Columbia. Although only 10% of the students overall, consider *socio-economic* factors to be a weakness, a considerably greater proportion of postgraduate students (21%) dislike these aspects. Similarly, while 22% of the students overall, consider *facilities* to be a weakness, a lower proportion of postgraduate students (13%) dislike these aspects.
- Although Asian/Pacific students and European/American students have slightly different perceptions about strengths of British Columbia, their perceptions regarding its weaknesses tend to be similar. The only notable exception is in relation to dislike of British Columbia's *nature and climate* – where 17% of European/American students consider this to be a weakness of British Columbia. In contrast, only 8% of Asian/Pacific students consider this aspect to be a weakness.
- It is of interest that while 35% of the students consider factors relating to its *people* as a strength of British Columbia, 12% considers these factors to be a weakness.

Comments

- It is encouraging that specific strong factors seem to be more identifiable than factors considered to be specific weaknesses.
- The low frequency by which the various weaknesses are mentioned by students tends to indicate that British Columbia does not appear to have an exceptional weakness that may be alienating the target market and which may be strongly inhibiting effective positioning of British Columbia within the marketplace.
- Nonetheless, British Columbia post secondary education institutions may consider the need to improve its facilities - especially relating to a sometimes perceived poor public transport communication system.

37. Previous Experiences in British Columbia/Canada

Students were asked to indicate whether they had previously visited British Columbia/Canada before their current level of study at their institution. The following table summarizes their responses.

Whether was in British Columbia before current level of study

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
No	64	65	63	67	72	68	36	38	31	63	71	75
Net Yes												
Total	30	32	34	30	23	28	59	60	56	33	22	13
Yes - as a student												
Total	21	23	24	20	8	20	43	47	31	24	9	13
Yes - student studying at this institution on a student visa	5	5	4	7	3	4	15	18	6	5	6	
Yes - student studying at in British Columbia on a student visa at another institution	12	14	16	11	3	12	23	24	19	15	1	13
Yes - student studying at in British Columbia on a tourist visa	2	2	3		3	3	2	2		2	1	
Yes - student studying in another province in Canada	1	1	1	2		2	3	2	6	2	1	
Yes - as a tourist only	9	10	10	10	13	7	13	11	19	8	11	
Yes - on business	1				3	1	3	2	6	1	2	
Invalid response	0						2	2			1	
NOT ESTABLISHED	5	3	2	3	5	4	3		13	4	6	13

Level of study previously

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	117	34	22	12	3	53	26	21	5	107	8	2
	100	100	100	100	100	100	100	100	100	100	100	100
Secondary school level	18	29	36	17		13	15	14	20	17	38	
Undergraduate course	15	15	5	33	33	13	19	14	40	14	38	
English language training	56	47	59	25	67	66	50	57	20	58	38	50
Foundation course	12	12	5	25		6	23	14	60	12		50
Vocational/career technical course	4					2	15	14	20	5		
Other	3	3	5			2	4	5		3		
NOT ESTABLISHED	2	3		8		2				2		

General Observations

- Overall, it is unlikely that students had been in British Columbia/Canada prior to commencing their international study there – less than one-third (30%) of the students had been in British Columbia/Canada before their current level of study. Most of these students who had been in British Columbia/Canada before, had been there as a *student*, not as a tourist. Only 9% of all students had been touring in British Columbia/Canada before commencing their current level of studies there, while 21% had been there as a *student*.
- Students who had been in British Columbia/Canada before as a *student*, had previously studied in various institutions. There was no particular predominant institution where this previous study tended to occur.
- Vocational students have a much greater tendency of previously being in British Columbia/Canada than other types of students have. The majority of vocational students (59%) had been in British Columbia/Canada before their current level of study (and most probably for study purposes). In comparison, only a small proportion of other types of students (less than one-quarter) had been in British Columbia/Canada before their current level of study.
- Furthermore, although there is only a low probability in either case, Asian/Pacific students have a greater likelihood than European/American students do, to have previously been in British Columbia/Canada before their current level of study (33% compared with 22% respectively). In particular, Asian/Pacific students have a much greater likelihood of having previously been there as a *student* (24% compared with 9%, respectively).

- More than half of the students (56%) who have already been in British Columbia/Canada as a *student* prior to undertaking their current level of study, had undertaken *English Language training*. Only a small proportion had undertaken this previous study at *secondary school level*.
- Furthermore, not only do Asian/Pacific students have a greater likelihood, than European/American students do, to have previously been in British Columbia/Canada before their current level of study, not surprisingly, Asian/Pacific students also have a greater tendency to undertake English Language training as this form of previous study in British Columbia/Canada. The majority of Asian/Pacific students (58%), compared with only 38% of European/American students who have previously studied in British Columbia/Canada, have undertaken *English Language training*.

Comments

- It is noteworthy that students studying in British Columbia/Canada seldom tend to visit the country before going there to undertake their international studies and a high proportion of those that had been there before, had been there for study purposes. From a British Columbian marketing perspective, this emphasizes the importance of high quality marketing material reaching students in their source country.
- Given that the majority of vocational students (59%) had been in British Columbia/Canada before their current level of study (and most probably for study purposes), an opportunity exists to reach prospective vocational students while already in British Columbia/Canada, as well as in their source country.
- In contrast, it seems more worthwhile to concentrate marketing campaigns to attract other kinds of students, particularly postgraduate students and English Language students within their home country, as only a relatively small proportion (less than 30%) tend to visit British Columbia/Canada beforehand.
- Although in either case the incidence is low, it may be worthwhile to try to reach Asian/Pacific students in British Columbia as well as in their home country, as they have a greater likelihood, than European/American students do, to have previously been in British Columbia/Canada before their current level of study (33% compared with 22% respectively). Asian/Pacific students already undertaking English Language courses, are quite likely to be the most worthwhile targets.
- In contrast, it seems more worthwhile to concentrate marketing campaigns to attract European/American students within their home country, as only a relatively small proportion tend to visit British Columbia/Canada beforehand.

- Given that only a small proportion of students had already been in British Columbia/Canada as a student at a secondary school, developing any marketing campaigns within British Columbia secondary schools can be considered of low priority.

38. Previous Personal Connections within British Columbia

Students were also asked to indicate whether they had friends or relatives already living in British Columbia, before they started their current study level/course in British Columbia. The following table summarizes their responses.

Before studying in BC whether had friends or relatives living here

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Friends only	31	26	19	38	36	34	33	36	25	32	31	19
Relatives only	12	13	14	11	8	14	13	18		12	11	31
Both friends and relatives	8	10	12	7	5	8	13	13	13	10	3	
Neither friends nor relatives	43	47	52	39	46	41	38	33	50	43	48	44
Invalid response						1						
NOT ESTABLISHED	5	3	2	5	5	3	3		13	3	7	6

General observations

- Just over half of students (51%) already have personal contacts in British Columbia before studying there. Only 43% have neither *friends* nor *relatives* already in the student's destination country.
- It is more common for students who already have personal contacts in British Columbia before studying there, to have *friends*, rather than *relatives* already in British Columbia. In total, 39% of the students already have *friends* there, while only 20% already have *relatives* there. Very few students (8%) already had both a *friend*, as well as a *relative* there.
- Furthermore, although Asian/Pacific students have a much greater likelihood, than European/American students do, to have previously been in British Columbia before their current level of study (33% compared with 22% respectively); they are just as unlikely to have either *friends* and/or *relatives* there.

Comments

- As the number of immigrants, visitors and students from source countries increases, and as the returning alumni grows, there is an opportunity to reach prospective students through these means. The considerable proportion of students with friends and/ or relatives already in British Columbia indicates an opportunity for British Columbia to expand its market share by broadly advertising its international programs within British Columbia itself – particularly through local international community agencies within the country. British Columbian marketers should not underestimate the potential of word of mouth within British Columbia. In a way, families and friends already in British Columbia inadvertently become promoters themselves, by encouraging students or families of potential students to make British Columbia the student’s favored choice.

Section G - Student Profile

This section provides a profile of the student sample used for collating and interpreting the results.

39. Type of Student

	Total	Country of origin		
		Asia Pacific	Europe Americas	Other
Total	564	449	90	16
	100	100	100	100
1st year Undergraduate (Bachelor level) student	16	17	9	38
2nd year Undergraduate (Bachelor level) student	11	9	24	
Post-Graduate/Graduate (Masters/PhD) student	7	4	21	13
English language (ESL) student	47	54	19	19
1st year Vocational/Career Technical student (Cert/Diploma)	8	8	9	13
2nd year Vocational/Career Technical student (Cert/Diploma)	3	3	1	6
Invalid response	2	1	9	
NOT ESTABLISHED	6	4	8	13

General observations

- As shown by the above table, the greatest proportion of the respondents are *English Language students* (47%), followed by *first year undergraduate students* (16%), then *second year undergraduate students* (11%). Only 11% of the respondents are *Vocational/Career Technical (Cert/Diploma) students*, while only 7% are *postgraduate students* – hence indicating a low representation of these kinds of students in the study.
- As seen by the above chart, Asian/Pacific students are far more likely than European/American students are, to be *English Language students* (54% compared with 19% respectively). In contrast, European/American students (although more evenly dispersed) are nonetheless more likely to be either *second year undergraduates* (24% compared with 9% respectively) or *postgraduate students* (21% compared with 4% respectively).

Comments

- Generally, there is a higher representation of English Language students, compared with other types of students, in the study. However, this over-representation of English Language students mainly applies to Asian/Pacific students, and is not reflected in European/American students.

40. Subjects Currently Undertaken

The results of this question are included in this section of the report because information about the nature of subjects/courses studied in British Columbia may be useful indicators of why the students choose to study abroad, and which areas may be considered inadequate in their home country. There are different factors involved in subject and course selection – such as recognition of a qualification for practice at home. Also, evidence of what subjects are appealing is an important element in understanding why students are electing to undertake international study in British Columbia.

Current subject areas

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Agricultural and Natural Sciences	2	2	2	2	15	1	2	2		1	9	
Business/Management related	30	40	36	48	49	15	51	58	31	29	33	31
Communications	4	3	4	2	3	4	7	7	6	4	4	6
Computer and Information Services	10	16	22	7	3	7	20	20	19	11	7	19
Construction and Metal Trades		1	1									
Education	2	3	3	3	3	1				2	2	
English Language (ESL)	49	19	24	11	10	88	7	9		57	21	19
Engineering, Electrical and electronics	3	3	4	2	3	2	3	2	6	2	3	19
Fine, Visual and Performing Arts	2	3	3	2	3		5	7		2	2	
Health	1	1	2		3		2	2		1	1	
Hospitality, Tourism Services	3	3	4	2		2	10	9	13	4	1	
Legal and Social Sciences	3	5	6	5	3		3		13	2	7	
Liberal Arts and Humanities	7	18	18	18		1	3	2	6	6	9	13
Mechanical related	1	1	1	2	3	1	2	2		1	2	13
Office Administration	1	1	1			1	2	2			3	
Physical Education/recreation/Leisure	1	2	1	3		1	3	2	6	2	1	
Sciences	4	7	8	5	5	2	2		6	3	7	6
Transportation											1	
NOT ESTABLISHED	5	5	2	8	8	3	3		13	3	8	13

General Observations

- As shown by the above chart, the students in the survey are undertaking a wide dispersion of subjects. Nonetheless, two stand out, these being foremost, *English Language (ESL)* subjects, followed by *Business/Management* related subjects. The greatest proportion of students (49%) are studying *English Language (ESL)* subjects. This proportion is substantially higher than the proportion studying the next most commonly mentioned subject area, *Business/Management* related subjects (30%).
- However, undergraduate, and especially postgraduate and vocational students are most likely to be studying *Business/Management* related subjects (undertaken by 40% of all undergraduate students, 49% of the postgraduate students, and 51% of the vocational students), while, as expected, the large majority of English Language students are studying *English Language (ESL)* subjects (88%).
- Furthermore, Asian/Pacific students have a much greater likelihood, than European/American students do, to have previously been in British Columbia before their current level of study (most probably to undertake English Language training), they also have a greater tendency to be currently studying *English Language (ESL)* subjects. The greatest proportion of Asian/Pacific students (57%), compared with only 21% of European/American students are studying *English Language (ESL)* subjects.
- Regardless of other factors, the proportion of international students studying the more traditional subjects such as *Engineering* (3%), *Science* (4%) and *Health* (1%) is extremely low.

Comments

- The finding that the students in the survey are undertaking a wide dispersion of subjects indicates International student programs in British Columbia indeed provide a comprehensive level of service to international students.
- English Language (ESL) subjects are dominant in the international study arena in British Columbia. Approximately half of the students are studying English Language (ESL) subjects. However, this over-representation of English Language subjects may in part be attributed to the over-representation of Asian/Pacific English Language students in the study, and is not reflected in European/American students, where the most predominant subjects tend to be business-related subjects.
- Business-related subjects are also quite prominent for undergraduate, and especially postgraduate and vocational students. At least 40% of these types of students are studying business-related subjects.

- When marketing their post secondary education institutions, British Columbian international education marketing professionals looking to expand their market scope should also take note of the implications of the reduction in the demand for the more traditional subjects such as Engineering and Science.
- However, British Columbian international education marketing professionals need to be wary that Asian/Pacific students are unique in that they tend to go to British Columbia to study English Language subjects, rather than more business-related subjects. In contrast, European/American students are tending to choose vocational options such as Business/ Management related ones – possibly because of improved career opportunities.

41. Primary Sources of Student Funding

Primary source of funding for current course

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Myself	18	10	7	15	26	20	31	24	50	19	18	19
Parents	61	63	71	51	33	71	48	56	25	67	30	75
Other family/relatives	2	3	3	2		1	8	9	6	2	1	6
Scholarship (net)												
Total	7	9	8	11	23	3	5	4	6	4	23	
Scholarship - home government	2	4	2	7	5						11	
Scholarship - industry		1		2								
Scholarship - university	3	4	6	2	8	3	2	2		3	6	
Scholarship - other	1	1		2	10		3	2	6		7	
Student loan/bank loan	2	5	3	8						1	8	
Other	1	1	1	2	3					1		
Invalid response	4	5	4	5	10	2	7	7	6	3	12	
NOT ESTABLISHED	5	4	2	7	5	3	2		6	3	8	

General Observations

- Primarily, their *parents* fund the greatest proportion of students studying in British Columbia (61%). Furthermore, this proportion represents the majority.
- Less than one-fifth of the students (18%) are *self-funded*.
- Overall, very few students (7%) are primarily funded by *some form of scholarship*.
- However, although *parents* primarily fund the majority of international students, this predominately applies to first year undergraduates and English Language students (71% of either of these kinds of students are funded by their *parents*). In contrast, given that only 33% of postgraduate students, and only 25% of second year vocational students, are funded by their *parents*, this does not apply to postgraduate students or vocational students (particularly second years). Instead, as many as 26% of the postgraduate students are *self-funded*, while a further 23% are on *some form of scholarship*. Similarly, as many as 50% of the second year vocational students are *self-funded*.

- Furthermore, while *parents* primarily fund the majority of Asian/Pacific students (67%), they are unlikely to be the most over-riding funding source for the majority of European/American students. Even though parents are still the most common funding source for European/American students, overall only a minority are funded by this source (30%). Furthermore, European/American students are only slightly less likely to be funded by *some form of scholarship* (23%), as they are to be funded by their *parents*.

Comments

- The proportion of students whose studies are funded by their parents (61%) does not tend to correlate with the low level of parental influence over destination decisions (40%).
- In relation to Asian/Pacific students, parents are presumably influential in a student's decision, because in the majority of cases (67%), they are involved in the funding. There is also a strong sense of family in many Asian countries, with parents playing an increased influential role in their children's lives. The relatively high proportion of Asian/Pacific students subject to parental influence is most probably a reflection of the high proportion of students funded by this source. The fact that family members frequently influenced student's decisions reinforces the need to target marketing campaigns not just at Asian/Pacific students, but also at the entire family unit.

42. Length of Time in Canada

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Under 6 months	50	38	33	46	67	57	23	27	13	46	76	44
Between 6 months and 1 year	19	15	19	8	13	24	15	18	6	20	10	19
Between 1 year and 2 years	17	25	28	20	8	14	30	31	25	19	8	13
Over 2 years	11	21	17	26	5	3	33	24	56	12	4	19
Invalid response					3							6
NOT ESTABLISHED	3	2	3		5	2				2	2	

General observations

- The majority of students in the study have been in Canada for *no more than one year* (69%) – the largest proportion having been there for only *up to six months* (50%). Only 11% have been there for *two years or more*.
- More Asian/Pacific students in the survey had been in Canada for longer periods than European/American students. Only 66% of Asian/Pacific students (compared with 86% of European/American students) in the study have been in Canada for *no more than one year*– with only 46% of Asian/Pacific students (compared with 76% of European/American students) having been there for only *up to six months*.
- Furthermore, postgraduate students and English Language students tend to have been in Canada for shorter periods of time than other types of students had. As many as 67% of postgraduate students and 57% of the English Language students in the study have been in Canada for only *up to six months*.

Comments

- Students who have been in Canada for a short period (no more than one year) are predominant in the study sample (69%) – with approximately half of the students having been there for only up to six months (50%). However, this over-representation of newcomers may, in part, be attributed to the over-representation of English Language students in the study. It may also quite possibly be a reflection of the British Columbian international study population where international students have a tendency to only remain in the country for short periods.

43. Students' Country of Permanent Residence

Respondent's country

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Asia/Pacific												
Total	80	76	84	64	46	92	80	78	88	100		
Japan	21	17	19	15		28	26	27	25	27		
South Korea	13	7	6	8	5	20	13	13	13	16		
Taiwan	7	10	12	7	5	6	3	2	6	9		
China - Hong Kong	26	19	22	13	31	33	21	18	31	33		
China	4	7	12		3	2	8	11		5		
Indonesia	2	3	3	3	3	1	2	2		2		
Thailand	1	1		2		1				1		
India	1	3	2	3			2	2		2		
Pakistan		1	1				2		6			
China (Macau)	1	1	1	2			2	2		1		
Nepal		1	1									
Bangladesh		1	1									
Korea		1	1									
Singapore	1	2	2	2			2		6	1		
Brunei		1		2								
Australia	2	3		8						3		
Europe/Americas												
Total	16	20	9	36	49	6	15	18	6		100	
United States	1	2	1	3	3						6	
Mexico	3	2	1	3	8	3	2	2			21	
Germany	3	5	4	7	8		3	4			18	
UK	1	1		2			3	4			7	
France	1	2		5							6	
Sweden	1	2		5	8						7	
Finland	1										3	
Denmark					3						1	
Russia		1		2							2	
Ukraine					3		2	2			2	
Romania					3						1	
Czech Republic											1	
Austria					3						1	
Slovakia							2		6		1	
Yugoslavia											1	
Norway		1	1	2							2	
Liechtenstein		1	1								1	
Bulgaria					3						1	

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	Type of student									Country of origin			
	Total	Undergraduate		Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other		
		Total	1st yr	2nd yr			Total	1st yr	2nd yr				
Venezuela		1		2								2	
Peru					3							2	
Ecuador					3		2	2				2	
Columbia	1				3	1						3	
Brazil	1	1		2	3							3	
Caribbean Islands (Not specified)							2	2				1	
Turks & Coricos Islands		1		2								1	
Catalunya		1		2								1	
Argentina		1		2								1	
Other													
Total	3	4	7		5	1	5	4	6				100
Saudi Arabia													6
Lebanon		1	1				2	2					13
Jordan		1	1										6
Israel					3								6
Iran	1				3		2	2					25
Bahrain							2		6				6
Uganda		1	1										6
Nigeria		1	1										6
Kenya		1	1										13
Ghana		1	1										6
Ethiopia													6
NOT ESTABLISHED	2												

General observations

- As shown by the above chart, the survey contains a wide dispersion of individual countries. However, students from *Asian/Pacific countries* dominate the survey – with 80% of students in the study coming from these types of countries. In comparison, only a very small proportion of the study sample came from *European/American countries* (16%), indicating a low representation of these students in the study.
- *Hong Kong*, followed by *Japan* are the individual countries which have the highest representation in the study - with 26% of all students coming from *Hong Kong* and 21% coming from *Japan*. The remainder were widely dispersed, but most likely also to be from *Asian/Pacific countries*.
- It is also of interest that none of the students who were anti- recommending studying in British Columbia, come from *Asian/Pacific countries*.

- Furthermore, while nearly all the English Language students (92%) are from *Asian/Pacific countries*; in contrast, less than half of the postgraduate students (46%) come from these countries. Alternatively, postgraduate students (and to some extent, also second year undergraduate students) have a much higher tendency than other types of students to come from *European/American countries*. Overall, 49% of the postgraduate students and 36% of second year undergraduate students, compared with less than one-fifth of the other types of students, come from *European/American countries*.

Comments

- There is an overrepresentation of Asian/Pacific students, compared with European/American students in the study. However, this is a reflection of the British Columbian international study population, whereby the international activity of British Columbian post-secondary institutions is presently focused on the countries of Asia and the Pacific Rim.
- The top source countries represented in the study are Japan and Hong Kong, which is a reflection of the major source countries of the international students enrolled at British Columbian post secondary education institutions.
- Similarly the large overrepresentation of English Language students from Asian/Pacific countries, and the overrepresentation of postgraduate students (and to some extent, second year undergraduate students) from European/American countries may also be a reflection of the British Columbian international study population.

44. Students' Age

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Age												
18 or under	9	6	9	2		13	3	4		9	8	13
19 to 21	39	51	59	39	5	41	28	33	13	43	23	38
22 to 24	27	26	17	41	33	23	30	31	25	24	36	44
25 to 34	20	11	12	10	54	20	33	29	44	20	26	6
35 to 45	1	1	1	2	3	0	3		13	1	1	
Invalid response							2	2				
NOT ESTABLISHED	5	4	2	7	5	2	2		6	3	7	

General Observations

- The majority of students in the study are aged *between 19 and 24 years of age* (66%) – the largest proportion being aged *between 19 and 21 years of age*. Only 9% are *below 19 years of age* and only 21% are *more than 24 years of age*.
- Accordingly, postgraduate students tended to be older than other groups (57% of the postgraduate students compared with 21% overall) are *more than 24 years of age*.
- Furthermore, European/American students tended to be older than Asian/Pacific students in British Columbia – with only 32% of European/American students compared with 52% of Asian/Pacific students being *below 22 years of age*.

Comments

- There is an overrepresentation of students in the study aged between 19 and 24 years of age (66%). However, this is most likely a reflection of the British Columbian tertiary study population in which this age grouping tends to predominate.

45. Gender of Students

Gender

	Type of student									Country of origin		
	Total	Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
Male	40	42	39	48	46	40	38	38	38	38	48	81
Female	55	54	59	46	49	58	61	62	56	59	46	19
NOT ESTABLISHED	5	4	2	7	5	3	2		6	3	7	

General Observations

- Overall, there is a lower representation of *males* than *females* in the study (40% compared with 55%, respectively). However, this under-representation of *males* mainly applies to students from Asian/Pacific countries, and is not reflected in European/American students, where, the *male* proportion (48%) is about equal to that of *females* (46%).

46. Institution Currently Studying At

The following is a breakdown of British Columbian post secondary education institutions from which the study sample was derived.

Institution studying at

	Total	Type of student						Country of origin				
		Undergraduate			Postgraduate	English	Vocational			Asia Pacific	Europe Americas	Other
		Total	1st yr	2nd yr			Total	1st yr	2nd yr			
Total	564	151	90	61	39	264	61	45	16	449	90	16
	100	100	100	100	100	100	100	100	100	100	100	100
British Columbia Institute of Technology	10	2	2	2	5	10	28	31	19	11	2	
Camosun College	2	5	7	2		1	2	2		2	2	6
Capilano College	4	3	1	5	10	4	10	7	19	4	9	
Douglas College	5	7	10	2		4	18	16	25	6	1	6
Langara College	3	3	4	2		3	3		13	3	1	
Vancouver Community College	3					6				4		
College of the Rockies	6	2	1	3		11				6	6	6
Selkirk College	3					5				3	1	
College of New Caledonia	3	1	2		3	5				3	2	
Northern Lights College	5	5	7	2		7	7	7	6	6	1	
Northwest Community College	1	1	1				3	4		1		
Malapina University College	1	3	3	3		1				2	1	
Kwantlen University College	1	3	3	2			7	9		1	1	13
University College of the Fraser Valley	5	7	8	7		5	8	7	13	6	3	19
Okanagan University College	3	2	2	2	3	5	2	2		4		
University College of Cariboo	13	23	28	16		11	13	16	6	15	6	13
Royal Roads University	1				15					1	2	
University of Victoria	10	12	3	25	18	7				7	24	6
Simon Fraser University	3	2	3		3	5				3	1	6
University of British Columbia	13	11	9	13	41	10				10	24	25
University of Northern British Columbia	3	9	4	16	3					1	11	



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