STUDYMOVE

PRESS RELEASE

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International education in New Zealand continues to thrive. The results are in for the 3rd NZ International Education Benchmark!

The third benchmark report of international student recruitment and international mobility strategies for New Zealand universities is now complete and the results are in!

International education is an important enabler in strengthening New Zealand's economic, cultural and social links with the world. In 2016 the value of international education in New Zealand rose to $4.5 billion, with international student numbers increasing across almost all sectors of the industry. The industry is placed as the fourth largest export industry in New Zealand.

There is great interest among New Zealand Universities and the New Zealand Government to increase the number of international students studying at a New Zealand university and there is also a focus to increase opportunities for students to undertake a learning abroad experience. This report gives a very interesting insight that will be useful for future policy development at all levels.

This annual report developed by Studymove provides New Zealand universities with a detailed analysis of their internationalisation strategies at the national and individual university level. This year the analysis shows an impressive result for New Zealand universities in the area of international student recruitment and international student mobility.

All eight New Zealand universities reported growth in international student enrolments on-campus and revenue generated from international student fees in 2017. The fact that eight out of eight universities reported increments shows an overall positive result for the New Zealand Higher education sector. It is also a very positive result for New Zealand!

1. INTERNATIONAL STUDENT RECRUITMENT
MAIN RESULTS

The International Education Benchmark for New Zealand was established in October 2015 with the objective to benchmark all aspects of international student recruitment and international student mobility. In 2018, the comprehensive international education benchmark was conducted for the third time in conjunction with Education New Zealand and Universities New Zealand - Te Pōkai Tara. It benchmarks all eight New Zealand universities.

The report provides a comprehensive analysis of the recruitment strategies executed by all eight New Zealand universities. Below we present some of the highlights of the analysis.

Enrolments, Revenue and Impact to the New Zealand Economy

The eight New Zealand universities generated an aggregate **revenue of NZ$432.5 million from international student fees** (on-campus) in 2017. Also, all eight universities report an increment in revenue against the previous year. In aggregate universities reported **an increase of 11% in revenue** in comparison with 2016.

In 2017, all eight universities reported growth in international student enrolments with an aggregate of 28,099 which represented **an increase of 6.2% in international student enrolments** on-campus compared to 2016.

From the total, 46% were undergraduate students, 20% were postgraduate students, 18% were research students, 8% were study abroad, 5% exchange students and 4% were unknown.

After combining the results in revenue, international student enrolments and cost of living we can estimate that the 28,099 international students studying at New Zealand universities **contributed NZ$1.2 billion to the New Zealand economy** during the 2017.[i]

This figure confirms that the university sector provides the largest amount of international student fee revenue within the New Zealand international education industry.

Percentage of international students on campus

Another important aspect of this analysis Is to estimate the percentage of international student in campus. In 2017, all eight universities reported an aggregate of 167,505 student enrolments of which 28,099 were **international students which represents 16.8% of the student population**.

We can also report that the average percentage of international students in 2017 was 19% and the median was 17% of the student population. **In comparison, Australian universities reported that 26.8% of the student population are international students and for UK universities is 19%. (With Information from the Department of Education and Training, Australian Government, 2016).**

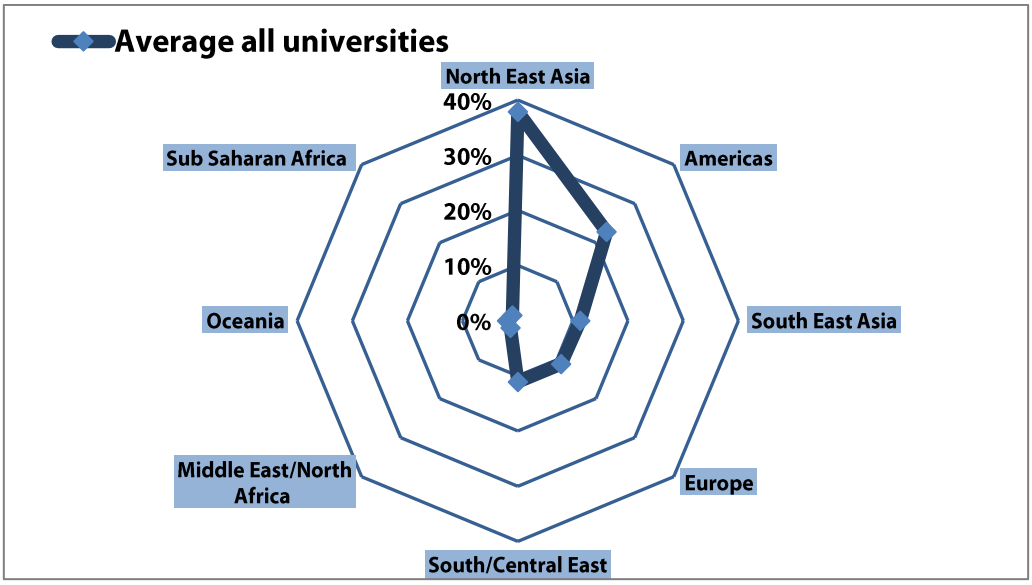
Where has growth come from?

All eight universities reported the nationality of international students from more than 57 countries in 2017.

In 2017, China was the largest source country with 4,234 international students, which represents 34.6% of the total. United States, India, Malaysia and Vietnam follow representing together 34.4% of the total. These top 5 markets represent almost 69.0% of the total number of international students recruited in 2017.

In 2017, the top regions for the recruitment of international students in aggregate were North East Asia with 39.1% (38.7% in 2016), Americas with 22.5% (20.6% in 2016) and South East Asia with 11.6% (11.3% in 2016).

Distribution of commencing international students by region (New Zealand, 2017)



Agents

All eight New Zealand universities provided information on the number of students recruited by agents. In 2017, **the average proportion of students via agents for this group of universities was 47.9%** and the median was 49.8%.

In 2017, **universities paid only 4.2% of their total generated revenue in commissions to education agents,** compared to 3.8% in 2016. Considering a different metric, universities invested NZ$1,426 in commissions for every international commencement in 2017.

2. INTERNATIONAL STUDENT MOBILITY
MAIN RESULTS

The study also focuses on assessing international mobility strategies implemented by all New Zealand universities. This analysis assists universities in gaining a better understanding of a future national strategy and what other universities may or may not be doing in this area.

Please note that universities continue to report difficulties in providing complete information in the non-credit area. So, it is likely that the data provided understates the actual participation level at most institutions.

Number of students in outbound mobility programs

The eight universities reported an aggregate of 2,789 students who participated in Outbound Mobility programs during 2017 in comparison with 2,894 students in 2016. This figure includes New Zealand citizens and international students from all academic levels and includes credit and non-credit Outbound Mobility programs.

Participation rate

To enable calculation of the participation rate, universities are asked to supply data including the total number of completing students. In aggregate, **all eight universities reported a participation rate of 6.4%** during 2017 in comparison with 5.7% in 2016 for all students. For undergraduate students, the aggregate participation rate in 2017 was 8.5% in comparison to 7.7% in 2016.

Where are they going?

All eight universities reported the destination of a total of 2,051 undergraduate and postgraduate students from 80 destinations in 2017. This total included also 1,815 undergraduate students and 204 postgraduate students.

In 2017, the top 25 destinations for students in Outbound Mobility Programs (undergraduate and graduate) were United Kingdom, United States of America, China, Canada, Australia, Netherlands, Japan, France, Korea (South), Germany, Denmark, Singapore, Spain, Sweden, Tonga, Multi-Destination, Hong Kong, Italy, Thailand, Do not know, Vietnam, India, Cook Islands, Ireland and South Africa.

The top 5 destinations represented 49% of the total and the top 25 made up 88% of all destinations in 2017.

When grouped by regions, **Europe was the most popular region for Outbound Mobility students in 2017.** In 2017, the average for Europe as a region was 34.8% in comparison with 29.0% in 2016. Asia was the second most popular region in 2017 with an average of 28.4% in comparison with 35.5% in 2016.

Percentage of destinations by regions (New Zealand, 2017)

REGION	Aggregate 2017
Asia	**27.2%**
Central America and the Caribbean	**0.0%**
Europe	**35.1%**
Middle East and North Africa	**0.5%**
North America	**19.6%**
Oceania	**11.0%**
Other (Includes Multi-Destination and Do not know)	**3.2%**
South America	**1.5%**
Sub-Saharan Africa	**2.0%**
TOTAL	**100.0%**

Credit status

An important element of this analysis was to determine if students in Outbound Mobility programs obtain academic credit during their experience. All eight New Zealand universities an aggregate of 72.7% of students participating in for-credit Outbound Mobility Programs in 2017 in comparison with 77.0% of students reported in 2016.

Study Level

In 2017, a total of 1,755 were undergraduate students which represents 80.9% of the total and 275 were postgraduate students which represents 12.7% of the total.

Field of Study

All eight universities reported on the number of New Zealand citizens or permanent residents that participated in Outbound Mobility Programs. In 2017, the top fields of study for undergraduate and postgraduate students in order of popularity were Society and Culture (30.5%), Management and Commerce (24.0%), Engineering and Related Technologies (14.0%), Health (10.3%), Natural and Physical Sciences (5.5%), Creative Arts (4.0%), Do not know (3.5%), Mixed field programs (1.4%), Information Technology (1.3%), Agriculture, Environmental and Related Studies (1.2%), Architecture and Building (1.2%), Other (1.2%), Undeclared (1.1%), Education (0.9%) and Food, Hospitality and Personal Services (0.1%).

Percentage of major fields of study – Undergraduate and Postgraduate (New Zealand, 2017)

MAJOR FIELD OF STUDY	Aggregate 2017
Agriculture, Environmental and Related Studies	**1.2%**
Architecture and Building	**1.2%**
Creative Arts	**4.0%**
Education	**0.9%**
Engineering and Related Technologies	**14.0%**
Food, Hospitality and Personal Services	**0.1%**
Health	**10.3%**
Information Technology	**1.3%**
Management and Commerce	**24.0%**
Mixed Field Programmes	**1.4%**
Natural and Physical Sciences	**5.5%**
Society and Culture	**30.5%**
Undeclared	**1.1%**
Other (please specify below – put count here)	**1.2%**
Do Not Know	**3.5%**
TOTAL	**100.0%**

Gender

Similar to Australia and the United States, New Zealand universities (seven reporting universities) reported more female students participating in Outbound Mobility programs in both 2016 and 2017.

In 2017, from the 1,694 undergraduate and postgraduate students that the seven universities reported, 938 students or 55.4% of those students were female and 702 students or 41.4% of students were male students participating in Outbound Mobility programs. In addition, universities reported that 3.2% were of unknown gender.

Duration

All eight New Zealand universities were able to report the program duration for undergraduate and postgraduate students who participated in an Outbound Mobility program.

Short-term programs were the most popular with an aggregate of 42.7%. Universities reported 41.8% of students undertook a mid-length program, 7.8% participated in other programs and 5.3% were participating in long-term programs.

Universities reported difficulties in providing complete information in this area. As a result, it is likely that the data provided understates the actual duration of outbound mobility programs at most institutions.

Program type

This section analysed what types of programs (for-credit and non-credit) that Outbound Mobility students participated in. The following categories were derived from areas of activity often grouped by practitioners, and with reference to international data:

A. **Exchange**
B. **Internship, Placements or Practical Training**
C. **Volunteering**
D. **Research**
E. **Conference**
F. **Language Program**
G. **Other**
H. **Unknown or not categorised**

All eight New Zealand universities were able to report on the totals by the program type and a breakdown of undergraduate and postgraduate students however, several universities reported data limitations for several program categories. It is likely that this analysis understates the actual participation levels in these program types.

In 2017, on average, the eight universities reported 41.4% of students participated in an internship, placement or practical training which is by far the most popular type of Outbound Mobility Program for all students. In 2017, 16.9% of students participated in an Exchange program.

Funding and support

Universities were asked to report how much they received and are allocating in funding to support student participation in Outbound Mobility programs. There were three categories of funding: Government funding, Institutional funding and Private funding.

Government funding - Four universities indicated that they receive funding via the Prime Minister's Scholarship for Asia and Latin America to support students' participation in Outbound Mobility programs. During 2017, the seven universities reported a total of 221 students receiving the Prime Minister's Scholarship for Asia for an undergraduate program.

Private funding – One university reported that they receive funding from private organisations or foundations in New Zealand to support outbound international mobility strategies.

Institutional funding - Universities reported on how much university funding, whether from the centre of the university or from faculties, was allocated to fund outbound international mobility of New Zealand university students. Seven universities reported how much university funding was allocated to outbound international mobility. The amount of institutional funding varied from NZ$20,000 to NZ$470,881 in 2016.

ABOUT STUDYMOVE

Studymove is an education consultancy specialising in the development of business intelligence reports, domestic and international benchmarking exercises and online marketing strategies for the international education industry. It was established in 2007 and in the last 11 years, we have been contracted to work on various small and large projects by institutions from Australia, Europe, Latin America, New Zealand and USA.

Our highly qualified and experienced team are experts in the development and implementation of specific solutions to support and enhance international student recruitment and mobility strategies. Our work is widely recognised for its analytical excellence and innovation.

More information about Studymove and their current projects is available via our website: www.studymove.com

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[i] Using cost of living calculations from *Infometrics and National Research Bureau (NRB), The Economic Impact of International Education in New Zealand 2015/16, 2016, New Zealand*.