TERTIARY EDUCATION ORGANISATION
INTERNATIONALISATION STUDY

2014

PHASE ONE:
INTERNATIONAL STUDENT PROGRAMMES

UNIVERSITIES
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INTRODUCTION

This paper presents the results from the international student programme phase of the Ministry of Education’s Tertiary Education Organisation Internationalisation Study. This is the first of three phases in a wider study of internationalisation in the tertiary sector. This report focuses on universities.

The three phases of the Study are:
- the international student programme
- international experiences for domestic students (including student mobility)
- institutional internationalisation, including institutional strategies, research internationalisation and international outreach.

The three phases of the Study will provide a snapshot of internationalisation within New Zealand tertiary education organisations (TEOs) as at 2014. This updates previous studies in 2006 and 1998.

Reports on Phases Two and Three will be published mid-2015.

Aim of the Tertiary Education Organisation Internationalisation Study
The Study aims to accurately document TEO internationalisation practice to provide a useful resource for the tertiary sector and for Government.

The Study goes beyond export education to look at internationalisation more broadly. The Study will help TEOs individually and collectively to understand the process of internationalisation in their subsector.

The Study will help Government better understand the value of international education and its impact on the New Zealand higher education system. It will also help the Government, the sector, and TEOs to understand the sectors’ strengths and areas for improvement and formulate targeted strategies and priority actions for the future.

The Study (particularly Phase Three) will also assist with the monitoring of priority six of the 2014-2019 Tertiary Education Strategy, which focuses on ‘growing international linkages.’

Information Sources for Phase One
The information in this paper comes from two sources. Part one is based on information from a survey conducted by the Ministry of Education between December 2013 and March 2014. All eight universities responded to the survey.

The Ministry of Education would like to thank the Sector Advisory Group, who assisted in the development of the survey. The members of the Sector Advisory Group were:
- Wayne Angus – University of Otago
- Beth Knowles – Christchurch Polytechnic Institute of Technology
- Neil Miller – Independent Tertiary Institutions
- Craig Musson – Independent Tertiary Education New Zealand
- Professor Rob Rabel (Chair) – Victoria University of Wellington
- Distinguished Professor Graham Hingangaroa Smith – Te Whare Wānanga o Awanuiārangi.

Universities New Zealand, Education New Zealand, Immigration New Zealand and the New Zealand Qualifications Authority also contributed to the development of the survey.
The data in part two of this paper comes from the Single Data Return (SDR) dataset. SDR data provided here goes beyond what is routinely released by the Ministry of Education on the Education Counts website, providing, for example, more information about international students by field of study, level of study, country of origin, and sector differences. It also counts non-full fee-paying students, including PhDs, exchange students, and NZAID scholarship students.

Historical data, also from the SDR, has also been used to provide a picture of the sector from 2009 onwards. Note that unless otherwise stated, total student numbers have been used, as opposed to equivalent full-time students (EFTS). The ratio of total students to EFTS at universities was 1.31:1 in 2013; this should be taken into account when determining the overall economic impact of international students. Unless otherwise stated, the figures refer to all international students, not just those paying full fees.
PART ONE: INTERNATIONALISATION SURVEY PHASE ONE RESULTS

The data in the first part of this report comes from Phase One of the Tertiary Education Internationalisation survey, which focused on the international student programme. All eight universities responded to this survey. The survey provides additional information not collected by the Single Data Return. It covers:

- study abroad student numbers
- students on short programmes
- recruitment and marketing techniques
- pastoral care
- alumni engagement
- qualification recognition
- offshore delivery.

2013 STUDY ABROAD STUDENTS

1. All eight universities reported having study abroad students enrolled in 2013. The total number of study abroad students enrolled across all eight universities was 1,934, accounting for eight percent of all international students.

2. The top source countries for study abroad students in 2013 were: United States of America, Germany, Norway, Denmark, and Japan. By far the largest cohort of students comes from the United States of America, as illustrated by the graph below:

![Figure 1: Top source countries for university study abroad students in 2013](image)

3. The number of study abroad students enrolled in each of the eight universities ranged from 95 to 529.

2013 SHORT PROGRAMMES (PROGRAMMES SHORTER THAN THREE MONTHS)

4. Six of the eight universities offered short programmes.

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2 Offering scholarships is one mechanism that can be used to attract international students. While scholarships for international students were included in the topics covered in the previous 2006 internationalisation study, a decision was made not to repeat this question in this 2014 study.
5. The total number of students enrolled in short courses was 1,662, of these 1,289 were on visitor visas. The number of short programmes offered by universities ranged from 1 to 17.

6. Six universities listed the fields of study in which they offered short programmes. They mentioned the following fields of study:

<table>
<thead>
<tr>
<th>University A</th>
<th>University B</th>
<th>University C</th>
<th>University D</th>
<th>University E</th>
<th>University F</th>
</tr>
</thead>
<tbody>
<tr>
<td>ESOL*</td>
<td>ESOL</td>
<td>ESOL</td>
<td>ESOL</td>
<td>Education</td>
<td>Agriculture</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* This university delivered ESOL programmes tailored to special interest areas in agriculture, education, New Zealand culture and nursing.

7. By far the majority of students in short programmes were studying ESOL (~89%), followed by education (~5%) and management and commerce (~4%).

8. Students in short programmes received certificates of attendance, participation, and completion, rather than formal qualifications.

RECRUITMENT AND MARKETING

Levels of Study
9. Universities were asked to rank the three levels of study they will most target when recruiting international students in 2014. Of the seven universities that responded to this question, six said Bachelors degree (Level 7) was the most important, and one said 180-point Masters was the most important. The following graph shows the number of times each level of study was mentioned in a university’s top three:

Figure 2: Priority levels of study for international student recruitment
Disciplines of Study
10. Six of the eight universities said they promoted their strengths in particular disciplines when recruiting international students.

11. Respondents were asked to list the fields of study/disciplines they promoted when recruiting international students. The answers of the six universities that responded are detailed in the following graph, which illustrates the fields of study promoted by those universities, along with the number of universities that promote subjects in each field of study.

Figure 3: Disciplines universities promote during international student recruitment and the number of universities that promote each discipline

Recruitment and marketing tools
12. A range of recruitment and marketing tools were used by the universities. The following are used by all eight:
   - offshore education agents
   - social media
   - fairs and expos
   - feeder institutions, and
   - high-level Memoranda of Understanding (MoU) with overseas universities.

Agents
13. When asked what proportions of their international students were recruited by agents, five universities answered between 21-30%, and three answered between 41-50%.

Preferred tools
14. When asked which recruitment tools they found most effective, seven out of eight universities listed offshore education agents. The next most commonly mentioned recruitment tools were feeder institutions and fairs/expos, both of which were listed by five institutions.

15. Tools with a high level of disparity between use and perceived effectiveness included social media, alumni, international networks, and high-level MoU. This is charted in the graph below:
Figure 4: Most used versus most effective recruitment tools

Social Media
16. Facebook, Youtube, and Twitter were the social media platforms most used by universities, although as suggested in the preceding graph, most universities did not find them to be particularly effective. While universities have focused on Western social media, almost half also made use of social media platforms based in Asia, with one listing Weibo as among the most effective across all social media platforms.

17. Facebook and Youtube were found to be the most effective social media platform by the most universities (when asked for just one).

18. Those who chose Facebook commented that this platform is a friendly space to engage with students, students are comfortable using it, and that it is used to drive traffic to web-pages and send targeted messages out to contacts, including study abroad groups. It is also used to develop alumni networks.

19. Those who chose Youtube said that videos generate more interest as they appeal to the institution’s target audience, and allow targeting and a richer storytelling experience.
20. All universities said that they had a web-page dedicated to international students, as part of their university website. All university websites were hosted in New Zealand.

Regional education promotional groups
21. Seven universities reported that they were part of a regional education promotion group. These groups included:
   - Study Auckland (three universities)
   - Study Wellington (two universities)
   - Christchurch Educated
   - International Education Tauranga
   - Study Dunedin
   - International Education Manawatu
   - Waikato Education.

22. All seven universities indicated that they participate in education promotion activities organised by the regional group to which they belong.

Use of international partnerships to recruit students
23. Seven of the eight universities said that they leverage off other international partnerships to recruit international students (excluding international network memberships, MoU and twinning arrangements). These included partnerships with:
   - foreign governments (five universities)
   - foreign government scholarship bodies (four universities).

24. Universities also leveraged off relationships with foundation partner colleges, NZAID, Asian Development Bank, ANZ Bank, and local body tourism agencies.

Onshore recruitment
25. All eight universities actively recruited international students in New Zealand. The following graph shows the number of universities that actively recruited from each onshore source:
26. Universities recruited far more international students offshore than onshore, with between 75% and 90% of international students recruited offshore. The most common response to this question was “85%”.

**Effectiveness of Government agencies in supporting international student recruitment**

27. Universities ranked Government organisations in terms of effectiveness in supporting their marketing and recruitment of international students on a scale from 1 (not effective) to 4 (highly effective). The following graph shows universities’ ratings for each organisation:

**Figure 6: Onshore sources of international students**

![Bar chart showing the distribution of onshore sources of international students](image)

**Figure 7: University rankings of the effectiveness of Government agencies in supporting international student recruitment**

![Bar chart showing the effectiveness ratings of various government agencies](image)
PROMOTION OF WORK RIGHTS

28. During international student recruitment, all eight universities promoted opportunities to work part-time while studying and opportunities to apply for graduate work visas post-study, while four promoted opportunities for post-study pathways to residence.

PASTORAL CARE AND ASSISTANCE FOR INTERNATIONAL STUDENTS

29. All eight universities indicated that they had an institutional strategy/plan that aimed to ensure sufficient care and support for international students.

Support for staff

30. Seven out of eight universities said they provided cross-cultural training for academic and general staff who may come in direct contact with international students. Training commonly took the form of cross-cultural training workshops delivered by internal or external professional development teams.

31. Types of training include:
   - cross-cultural communication workshops offered twice yearly to all staff
   - mix of cross-cultural training workshops run by an external provider and internal workshops run by appropriately qualified staff
   - intercultural communications workshop
   - cross-cultural workshops and one-one training for key staff
   - on-the-job training for office staff and ISANA conference attendance for pastoral care staff
   - workshops on compliance with the Code of Practice for the Pastoral Care of International Students available through the university staff development
   - sessions run by the Professional Development team using existing staff.

Support for international students

32. Universities offered a range of support targeted at international students.
   - All eight universities offered:
     - orientation on studying and living in New Zealand in general, and the institution in particular
     - referral services, including health or financial counselling, banking, and accommodation
     - special support to meet international students’ cultural/religious needs.
   - Seven of the eight universities offered:
     - language support, including ESOL support
     - special measures to encourage international students to interact with domestic students and/or integrate with local communities
     - provision of information and pastoral care tailored to students with dependants and/or families.

English language assistance available to international students

33. After admission into their chosen academic programme, universities offered international students several types of English language assistance, as illustrated in the graph below:
Advice on working while studying and working after study
34. Universities provided a range of advice for international students on working while studying and working after study.
   • All eight universities provided for international students:
     o advice on their entitlements under employment law and regulations – this ranged from information provided on websites or at orientation to formal services where students can seek advice on employment law
     o career advice and/or support to find employment upon completion of their studies.
   • Seven out of the eight universities provided advice and/or support to help international students find part-time jobs while studying.
   • Five out of the eight universities said they provided career advice and/or support to their international graduates to help them find work after they had completed their studies.
   • Two out of the eight universities provided advice or referrals for international graduates to settle permanently in New Zealand. Two of the universities who answered ‘no’ to this question added that they refer students directly to Immigration New Zealand.

Dissemination of information about the Code of Practice for Pastoral Care
35. To ensure that international students are aware of the Code of Practice for Pastoral Care of international students and in particular the grievance procedures, universities disseminated information in a variety of ways, shown in the following graph:
Student satisfaction surveys
36. All eight universities participated in international student satisfaction surveys. One participated more than twice a year, six participated once a year, and one participated once every two years.

37. In the comments section, six universities said they participated in the i-Graduate International Student Barometer. Six universities also conducted their own surveys of their international students.

INTERNATIONAL ALUMNI
38. Five of the eight universities said they had international alumni chapters or networking groups. Of the universities that said they did not have alumni chapters or networking groups, one said that they do have alumni representatives in some countries and another said that while they did not have a chapter-based programme, they did organise and host alumni events.

39. For the five universities that said they had international alumni chapters or networking groups, the chart below indicates in which countries these groups operated and the number of universities that operated there:
One university added that they have alumni groups in Scandinavia.

40. Universities reported that their largest alumni groups were in the following countries:
   - Malaysia (four universities)
   - United States of America (three)
   - China (two)
   - United Kingdom (two)
   - Vietnam (two)
   - Denmark (one)
   - Germany (one).

41. Universities reported that their most active alumni groups were in the following countries:
   - Malaysia (four universities)
   - China (two)
   - United Kingdom (two)
   - Vietnam (two)
   - Denmark (one)
   - Germany (one)
   - Singapore (one)
   - United States of America (one).

42. Three universities commented that they did not restrict attendance at alumni events to particular cohorts (e.g. domestic students, international students), but rather ran events for all alumni in a number of countries each year.

43. All five universities with alumni chapters/networking groups held international alumni events, hosted by the university itself, or in conjunction with other universities, New Zealand Government agencies (such as Education New Zealand (ENZ) or the embassy/consulate), or local universities.
44. Four of the five universities regularly conducted fundraising with international alumni, but only two of the four found that these fundraising initiatives met their expectations. One university who said that fundraising initiatives were below their expectations listed maintenance of contact details and lack of resources to engage with alumni in meaningful ways as key challenges.

45. The most effective forms of fundraising were reported to be approaches to individuals, targeted appeals, and direct mail annual giving programmes.

46. Universities engaged with alumni in a variety of ways. Four of the five:
   - sought support from eminent international student alumni in promotions
   - regularly produced an electronic publication/newsletter for alumni, and had an alumni web page
   - provided ‘life-long’ services/benefits for alumni (library and gym access, networking opportunities, professional development opportunities, public lectures, and a ‘landing pad’ for newly arrived alumni).

47. The five universities drew on alumni networks to work with prospective students, current students and graduates in the following ways:
   - student recruitment (five universities)
   - provision of internships (two)
   - briefings before new students leave country (one)
   - student career mentoring (one).

48. The five universities sought feedback from alumni on:
   - whether they wish to remain engaged (four universities)
   - the quality of their engagement with events (three)
   - satisfaction with their study experience (two)
   - how their study has benefitted their careers (two).

Connecting with Alumni

49. Universities identified the main challenges to maintaining connections with alumni as:
   - maintaining accurate information and contact details for alumni
   - frequency of face-to-face contact
   - costs of postal communications
   - keeping communications relevant to diverse international communities
   - engaging alumni in activities
   - limited staff resources and budget.

50. Universities found the following methods to be of most use in maintaining connections with alumni:
   - regular events and face-to-face meetings in key locations
   - ensuring contact details are current
   - ensuring communications are relevant and engaging
   - frequent contact with in-country alumni representatives
   - local networks
   - connecting with alumni through social media and email.

QUALIFICATION RECOGNITION

51. Only one university reported that their international students found that their qualification was not recognised on their return home. This issue, affecting New Zealand Doctoral
graduates who were unable to use the title Dr. in Germany was subsequently resolved through government to government negotiation.

52. The same university reported that its graduates in the professions (law, teaching, etc.) experienced a range of accreditation issues offshore.

**OFFSHORE DELIVERY**

53. Six out of the eight universities are involved in offshore delivery. The two universities who did not deliver offshore said that they had no plans to do so in the near future.

**Bilateral academic credit recognition**

54. All six universities engaged in offshore delivery have bilateral academic credit recognition and matching arrangements with offshore institutions. These arrangements allow students to undertake a substantial portion of their programmes offshore before enrolling at the New Zealand partner institution. The range of countries our universities have bilateral credit recognition arrangements with is illustrated in the following graph:

Figure 11: Locations of offshore bilateral and academic credit recognition and matching arrangements

![Graph illustrating locations of offshore bilateral and academic credit recognition and matching arrangements]

**Offshore campuses**

55. Only one university delivered its qualifications or components of its qualifications at their own offshore campus using their own staff, in Singapore.

**Offshore delivery through a partner institution**

56. The most popular mode of offshore delivery among universities was to deliver their qualifications or components of those qualifications at other institutions but using their own staff. Five universities had such arrangements across a diverse range of countries.

57. Three universities had offshore delivery arrangements through partner institutions in China and three had such arrangements in Singapore.
Franchise models

58. Two universities commissioned or franchised offshore institutions to deliver their qualifications or components of their qualifications on their behalf. One university had such an arrangement in China and another university had one in Singapore.

Other offshore delivery models

59. Universities also offered offshore delivery through models not listed above.

60. One university offered blended delivery with a mix of on-site in New Zealand, on-site offshore and online supported programmes. This university also offered fly-in, fly-out offshore delivery, English language support delivered offshore to students prior to articulating into programmes in New Zealand and fully online delivery.

61. Five New Zealand universities collaborated to contribute to the New Zealand Studies programme at Peking University.

Joint arrangements with offshore institutions

62. Six universities had twinning/articulation programmes, four offered jointly taught programmes, and three offered jointly awarded qualifications.

63. One university added that it offered dual awards where offshore partners teach their own programmes which are designed to dovetail into a research Masters at their university.

Distance education

64. Four universities said they offered distance education programmes to international students offshore. Most of these programmes are offered globally and open to students in any country. One university provided distance education specifically in Sri Lanka, but added that it also intended to deliver Massive Open Online Courses (MOOCs) worldwide.

65. The following delivery methods were used by all four universities offering distance education:
   - online course materials and course administration
   - online forums for student/student and student/teacher discussions
   - webinars and other such online modes to support real-time tutorials.

66. Three universities used face-to-face contact courses/block courses to enhance distance learning and one university used postal or courier services to deliver study material.

67. Elaborating on their distance delivery programmes, one university added that blended teaching/learning models are their preferred mode of delivery, as they balance quality assurance needs with a financially viable model. This university offered a blended online model in a number of countries, including: China, Mongolia, Bhutan, Bangladesh, India, Sri Lanka, Pakistan, Nepal, and Afghanistan.
68. Two universities delivered distance education through consortia which provide a MOOC platform: one partnered with Open2Study and the other collaborated to deliver a MOOC with international partners.

**Quality assurance and pastoral care for students studying offshore**

69. Of the five universities offering programmes offshore, three universities implemented the New Zealand Qualifications Framework (NZQF) Offshore Programme Delivery Rules. One university said that these rules were not applicable because their courses were delivered entirely from a New Zealand campus.

70. Four universities had in place quality assurance rules or procedures in addition to the NZQF Rules. Three universities gave further detail, adding that offshore programmes must also comply with institutional quality assurance processes and rules as well as those of the Committee on University Academic Programmes. One added that they also adhered to international accreditation requirements; another noted that programmes are regularly audited internally and externally.

71. All five universities that offered programmes offshore had pastoral care arrangements in place for offshore students.

**FUTURE PLANS FOR OFFSHORE DELIVERY**

72. All five universities involved in offshore delivery said they had plans to expand their offshore delivery. Universities said they would look to expand into the following modes of delivery:

<table>
<thead>
<tr>
<th>University A</th>
<th>University B</th>
<th>University C</th>
<th>University D</th>
<th>University E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twinning Articulation</td>
<td>Collaborative provision (mainly articulation agreements; some jointly taught awards) Some distance delivery</td>
<td>Blended delivery Fully-online delivery Offshore fly-in fly-out (where viable) Offshore campus (if viable model found)²</td>
<td>Small growth in distance education</td>
<td>Dual masters ‘Flying faculty’ where opportunities arise</td>
</tr>
</tbody>
</table>

73. The following graphs show, for future expansion of offshore delivery: (1) the countries that universities will target, (2) the levels of study universities will teach, and (3) which fields of study will be offered:
74. Two universities commented that as they were looking to expand their distance education delivery, they planned to expand globally, not just in particular countries. However, one university added that it was exploring offshore delivery into the Middle East region.
OVERALL PRIORITIES FOR INTERNATIONAL STUDENT RECRUITMENT

75. The universities who said that they were interested in expanding their offshore activities were asked to rank the marketing and recruitment priority that they gave to particular categories of international students, from 1 (highest) to 5 (lowest).

76. A key trend is that onshore on-campus students are the highest priority for all respondents, and that offshore on-campus is either the lowest or second to lowest priority.

77. The five that answered gave the following average rankings:

Figure 15: University international student recruitment priorities
PART TWO: INTERNATIONAL STUDENT DATA

The following data provides an overview of international students enrolled at New Zealand universities in 2013. It comes from the SDR, and complements the survey by rounding out information on the international student programme at universities. More information is available on the Ministry’s Education Counts website, although the data covered here is more detailed in certain areas.

TOTAL INTERNATIONAL UNIVERSITY STUDENT NUMBERS

1. Total international student enrolments at New Zealand universities increased 8.5% between 2009-2013.

2. The graph below shows the total number of international students enrolled at New Zealand universities onshore and offshore, by year in 2009-2013. The graph shows:
   - onshore numbers increased 6% between 2009-2013
   - offshore numbers increased 112.1% between 2009-2013 (from a very low base).

Figure 16: Onshore and offshore international student numbers at universities 2009-2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Onshore</th>
<th>Offshore</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>21,730</td>
<td>660</td>
</tr>
<tr>
<td>2010</td>
<td>22,040</td>
<td>950</td>
</tr>
<tr>
<td>2011</td>
<td>22,180</td>
<td>1,010</td>
</tr>
<tr>
<td>2012</td>
<td>22,250</td>
<td>1,290</td>
</tr>
<tr>
<td>2013</td>
<td>23,030</td>
<td>1,400</td>
</tr>
</tbody>
</table>

DISTRIBUTION OF INTERNATIONAL STUDENTS ACROSS TERTIARY EDUCATION ORGANISATIONS

3. In 2013 universities attracted 50% of all international students enrolled in Government-funded TEOs including Institutes of Technology and Polytechnics (ITPs) and Government-funded Private Training Establishments (PTEs). The data excludes those PTEs that do not receive Government subsidies and all non-formal learning and on-job industry training.
4. Universities’ share of the international student market compared with ITPs and PTEs has decreased very slightly over the last five years, from 50.8% in 2009 to 49.9% in 2013. This decrease is not statistically significant.

5. In 2013 the three main sources for international students studying in New Zealand universities were China, the United States and Malaysia. The United States is primarily
a study abroad market. The graph below charts the top 11 source countries for international students:

**Figure 19: Top eleven source countries for international intramural onshore student numbers in universities 2013**

<table>
<thead>
<tr>
<th>Source Country</th>
<th>2013 Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>8,110</td>
</tr>
<tr>
<td>USA</td>
<td>2,160</td>
</tr>
<tr>
<td>Malaysia</td>
<td>1,520</td>
</tr>
<tr>
<td>India</td>
<td>1,200</td>
</tr>
<tr>
<td>South Korea</td>
<td>850</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>810</td>
</tr>
<tr>
<td>Vietnam</td>
<td>780</td>
</tr>
<tr>
<td>Japan</td>
<td>520</td>
</tr>
<tr>
<td>Germany</td>
<td>490</td>
</tr>
<tr>
<td>UK</td>
<td>420</td>
</tr>
<tr>
<td>Indonesia</td>
<td>320</td>
</tr>
</tbody>
</table>

**Source Country Trends 2009-2013**

6. The period between 2009 and 2013 saw an increase in key markets China, Vietnam and Indonesia, and a decline in the markets of Germany, South Korea and Malaysia. The decline in the German market is likely to be linked to the removal of domestic fees for German Masters students.

<table>
<thead>
<tr>
<th>Increasing</th>
<th>Percentage increase between 2009-2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>China: 32.5%</td>
<td></td>
</tr>
<tr>
<td>Vietnam: 66%</td>
<td></td>
</tr>
<tr>
<td>Indonesia: 52.4%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Decreasing</th>
<th>Percentage decrease between 2009-2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany: 59.2%</td>
<td></td>
</tr>
<tr>
<td>South Korea: 28%</td>
<td></td>
</tr>
<tr>
<td>Malaysia: 22.1%</td>
<td></td>
</tr>
</tbody>
</table>
NUMBERS OF INTERNATIONAL STUDENTS STUDYING IN NEW ZEALAND UNIVERSITIES BY LEVEL OF STUDY

7. Bachelor degree students made up over half of the cohort of international students studying at our universities followed by Doctoral, then Masters students. The proportions of international students across all levels of university study are illustrated by the graph below:
Figure 21: Percentage of international intramural onshore student numbers by level of study 2013

8. Between 2009 and 2013 numbers of international students at Bachelors level remained static, while numbers in Doctoral and Masters study increased steadily. The increase in doctoral numbers can be largely attributed to the Government’s domestic fees for international PhD students.

9. The steeper increase in the number of international Masters students between 2012 and 2013 compared with previous years is likely due in part to the introduction in 2013 of the 150-point or 180-point Masters, which students may enter after three years of Bachelors study.

10. International student numbers in pre-degree study decreased between 2009 and 2013.

### Level of study trends

<table>
<thead>
<tr>
<th>Percentage increase between 2009-2013</th>
<th>Percentage decrease between 2009-2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctoral: 49.8%</td>
<td>Certificates and Diplomas Levels 5-7: 79.5%</td>
</tr>
<tr>
<td>Masters: 39%</td>
<td></td>
</tr>
</tbody>
</table>

**Table:**

<table>
<thead>
<tr>
<th>Level of Study</th>
<th>Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelors</td>
<td>12,520</td>
</tr>
<tr>
<td>Doctoral</td>
<td>3,580</td>
</tr>
<tr>
<td>Masters</td>
<td>2,480</td>
</tr>
<tr>
<td>Honours/Postgraduate certificates/diplomas</td>
<td>2,020</td>
</tr>
<tr>
<td>Certificate 4</td>
<td>1,930</td>
</tr>
<tr>
<td>Graduate certificates/diplomas</td>
<td>510</td>
</tr>
<tr>
<td>Certificates 1-3</td>
<td>380</td>
</tr>
<tr>
<td>Certificates 5-7</td>
<td>170</td>
</tr>
</tbody>
</table>
11. ‘Field of study’ is the only variable where trends differ when analysed by EFTS or by student numbers. For this reason we have included data using both metrics.

12. When analysed by total number of students, society and culture is the most popular field of study followed by management and commerce, and then science. This is demonstrated by the graph below:

### NUMBERS OF INTERNATIONAL UNIVERSITY STUDENTS STUDYING IN NEW ZEALAND AT UNIVERSITY CAMPUSES BY FIELD OF STUDY

<table>
<thead>
<tr>
<th>Field of Study</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelors</td>
<td>12,320</td>
<td>12,220</td>
<td>12,420</td>
<td>12,380</td>
<td>12,520</td>
</tr>
<tr>
<td>Doctoral</td>
<td>2,390</td>
<td>2,780</td>
<td>3,110</td>
<td>3,280</td>
<td>3,580</td>
</tr>
<tr>
<td>Masters</td>
<td>1,770</td>
<td>1,840</td>
<td>1,780</td>
<td>2,080</td>
<td>2,460</td>
</tr>
<tr>
<td>Honours/Postgraduate certificates/diplomas</td>
<td>2,050</td>
<td>2,090</td>
<td>2,040</td>
<td>1,910</td>
<td>2,020</td>
</tr>
<tr>
<td>Certificate 4</td>
<td>1,760</td>
<td>1,810</td>
<td>1,950</td>
<td>2,060</td>
<td>1,930</td>
</tr>
<tr>
<td>Graduate certificates/diplomas</td>
<td>860</td>
<td>840</td>
<td>660</td>
<td>520</td>
<td>510</td>
</tr>
<tr>
<td>Certificates 1-3</td>
<td>730</td>
<td>550</td>
<td>500</td>
<td>410</td>
<td>380</td>
</tr>
<tr>
<td>Certificates 5-7</td>
<td>830</td>
<td>740</td>
<td>530</td>
<td>440</td>
<td>170</td>
</tr>
</tbody>
</table>
13. By contrast, when analysed by EFTS, management and commerce becomes the most popular field of study, followed by society and culture and then sciences. A likely reason for the difference between analysis by EFTS and by total students numbers is that society and culture subjects are popular amongst study abroad students, a significant cohort of whom are only here for one semester.
Field of study trends – by student numbers

14. Between 2009 and 2013 international student numbers in management and commerce, IT, and sciences increased steadily. Engineering numbers increased more steeply. Student numbers in society and culture and creative arts remained static over this period, while numbers in education and mixed field studies decreased.

<table>
<thead>
<tr>
<th>Field of Study</th>
<th>2009-2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Society and culture</td>
<td>3,930</td>
</tr>
<tr>
<td>Management and commerce</td>
<td>4,640</td>
</tr>
<tr>
<td>Sciences</td>
<td>2,850</td>
</tr>
<tr>
<td>IT</td>
<td>1,140</td>
</tr>
<tr>
<td>Engineering</td>
<td>1,670</td>
</tr>
<tr>
<td>Creative arts</td>
<td>690</td>
</tr>
<tr>
<td>Health</td>
<td>1,160</td>
</tr>
<tr>
<td>Education</td>
<td>500</td>
</tr>
<tr>
<td>Agriculture and environment</td>
<td>320</td>
</tr>
<tr>
<td>Architecture</td>
<td>340</td>
</tr>
<tr>
<td>Mixed field studies</td>
<td>120</td>
</tr>
<tr>
<td>Food and hospitality</td>
<td>90</td>
</tr>
</tbody>
</table>

Percentage increase between 2009-2013

- Engineering: 44.3%
- IT: 15.5%
- Management & commerce: 9%

Percentage decrease between 2009-2013

- Education: 18.2%
- Mixed field studies: 52.7%

Figure 25: International intramural onshore student numbers in NZ universities by field of study (course NZSCED) 2009-2013
Field of study trends – by EFTS

15. When analysed by EFTS, sharper trends emerge. Management and commerce and engineering EFTS increased steeply, while EFTS in society and culture and education show a stronger declining trend.

<table>
<thead>
<tr>
<th>Field of Study</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Society and culture</td>
<td>10,410</td>
<td>10,410</td>
<td>10,460</td>
<td>10,560</td>
<td>10,340</td>
</tr>
<tr>
<td>Management and commerce</td>
<td>7,850</td>
<td>7,720</td>
<td>7,720</td>
<td>7,960</td>
<td>8,560</td>
</tr>
<tr>
<td>Sciences</td>
<td>6,000</td>
<td>6,240</td>
<td>6,390</td>
<td>6,430</td>
<td>8,690</td>
</tr>
<tr>
<td>IT</td>
<td>3,220</td>
<td>3,330</td>
<td>3,520</td>
<td>3,810</td>
<td>3,720</td>
</tr>
<tr>
<td>Engineering</td>
<td>2,030</td>
<td>2,240</td>
<td>2,360</td>
<td>2,560</td>
<td>2,930</td>
</tr>
<tr>
<td>Creative arts</td>
<td>2,320</td>
<td>2,350</td>
<td>2,400</td>
<td>2,240</td>
<td>2,270</td>
</tr>
<tr>
<td>Health</td>
<td>1,700</td>
<td>1,840</td>
<td>1,830</td>
<td>1,850</td>
<td>1,890</td>
</tr>
<tr>
<td>Education</td>
<td>1,210</td>
<td>1,300</td>
<td>1,350</td>
<td>1,100</td>
<td>990</td>
</tr>
<tr>
<td>Agriculture and environment</td>
<td>800</td>
<td>870</td>
<td>890</td>
<td>810</td>
<td>950</td>
</tr>
<tr>
<td>Architecture</td>
<td>400</td>
<td>390</td>
<td>400</td>
<td>410</td>
<td>510</td>
</tr>
<tr>
<td>Mixed field studies</td>
<td>930</td>
<td>980</td>
<td>770</td>
<td>660</td>
<td>440</td>
</tr>
<tr>
<td>Food and hospitality</td>
<td>260</td>
<td>250</td>
<td>240</td>
<td>230</td>
<td>300</td>
</tr>
</tbody>
</table>

Figure 26: International intramural onshore EFTS in NZ universities by field of study (course NZSCED) 2009-2013

Percentage increase between 2009-2013

- Engineering: 39.1%
- IT: 15.2%
- Management & commerce: 14.6%

Percentage decrease between 2009-2013

- Society and culture: 8.2%
- Education: 29.6%
- Mixed field studies: 60%
The number of students coming to New Zealand universities on exchange schemes decreased by 30.6% between 2009 and 2013. This data also comes from the SDR.

Universities attract by far the largest number of tertiary students on exchange schemes. However their share of this market has decreased slightly over the last five years, from 92.9% in 2009 to 91.5% in 2013. It should be noted that the number of inbound students on exchange is closely linked to the number of outbound students, as exchanges must be reciprocal. The decline in international students coming to New Zealand universities on exchange schemes is reflected in the graph below:

Figure 27: International intramural onshore students in NZ universities and ITPs on recognised exchange schemes 2009-2013
APPENDIX: Definitions

Foreign Fee-Paying Student
An international student who meets full tuition costs on their own or from funds provided to them by sponsors other than the New Zealand Ministry of Foreign Affairs and Trade.

Formal Student
For statistical purposes, a tertiary student is considered to be a formal student when enrolled in a formal programme of study at a tertiary education provider with an aggregated EFTS consumption value greater than 0.03 (i.e., more than one week’s full-time duration).

Institution
The term ‘institution’ is used in the survey instrument in a generic sense to include the full range of tertiary provider organisations surveyed: universities, ITPs, colleges and private training establishments.

International Student
A student who is not a New Zealand citizen, New Zealand permanent resident, or Australian citizen.

Onshore On-campus (Intramural) Student
A student, enrolled by the New Zealand institution as one of its students, undertaking a programme of study at a New Zealand campus of the institution. Units of study are undertaken through regular attendance at the institution as an integral and compulsory component of the course; or, where the student is studying towards a higher degree and regular attendance is not required, the student attends the institution for supervision and/or instruction as agreed with the supervisor. This includes any international student who is studying on campus in New Zealand as a component of a programme that involves study at campuses both in New Zealand and offshore.

Onshore Off-campus (Extramural) Student
A student, enrolled by the New Zealand institution as one of its students, undertaking a programme of study using materials provided by the institution in New Zealand, where lesson materials, assignments etc are delivered to the student off campus, and any associated attendance is of an incidental, special or voluntary nature.

Offshore On-campus (Intramural) Student
A student, enrolled by the New Zealand institution as one of its students, undertaking a programme of study provided by an offshore campus, study centre, or twinning partner of the institution, where attendance is required. The programme is undertaken through regular or intensive attendance or supervision.

Offshore Off-campus (Extramural) Student
A student, enrolled by the New Zealand institution as one of its students, undertaking a programme of study using materials provided by an offshore campus, study centre, or twinning partner of the institution, where lesson materials, assignments etc are delivered to the student off campus, and any associated attendance is of an incidental, special or voluntary nature.

Study Abroad
An Incoming Study Abroad Student is a student who is not a New Zealand citizen, a New Zealand permanent resident or an Australian citizen, and who is studying at a
New Zealand institution (for one or two semesters) on a fee-paying programme such as Study Abroad. A Study Abroad student would not normally intend to obtain a completed qualification from the New Zealand institution.

**Exchange Student**

An *Incoming Exchange Student* is a student who is not a New Zealand citizen, a New Zealand permanent resident or an Australian citizen, and who is studying at a New Zealand institution (usually for one or two semesters) under an exchange, reciprocal or joint programme or research project which does not involve the payment of an overseas student fee. An Exchange Student would not normally intend to obtain a completed qualification from the New Zealand institution.

An *Outgoing Exchange Student* is a student at a New Zealand institution who is studying at an overseas institution (usually for one or two semesters) under an exchange, reciprocal or joint programme or research project that does not involve the payment of an overseas student fee. An Exchange Student would normally intend to count the study at the overseas institution towards a qualification from the New Zealand institution.