TERTIARY EDUCATION ORGANISATION
INTERNATIONALISATION SURVEY
2014

PHASE ONE:
INTERNATIONAL STUDENT PROGRAMMES

INSTITUTES OF TECHNOLOGY AND POLYTECHNICS
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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 institutes of technology and polytechnics (ITPs).

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 in 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. Five ITPs 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.¹ 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 ITPs was 1.59:1 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 who are full fee-paying.

¹ SDR is a source system that holds education information required by Ministry of Education and Tertiary Education Commission. This is being used for funding, monitoring performance against investment plans, publishing performance information as well as statistical reporting purposes.
PART ONE: INTERNATIONALISATION SURVEY PHASE ONE RESULTS

1. 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. Five of New Zealand’s eighteen ITPs responded to the 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

2. Three of the five ITPs reported having Study Abroad students enrolled in 2013. The number of study abroad students at these ITPs was three, 39, and 856. The countries these students came from and the numbers of students from each country are listed below:

<table>
<thead>
<tr>
<th>ITP A</th>
<th>ITP B</th>
<th>ITP C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>No. of students</td>
<td>Country</td>
</tr>
<tr>
<td><strong>Largest</strong></td>
<td>India</td>
<td>320</td>
</tr>
<tr>
<td><strong>Second largest</strong></td>
<td>China</td>
<td>179</td>
</tr>
<tr>
<td><strong>Third largest</strong></td>
<td>Fiji</td>
<td>75</td>
</tr>
<tr>
<td><strong>Fourth largest</strong></td>
<td>Saudi Arabia</td>
<td>44</td>
</tr>
<tr>
<td><strong>Fifth largest</strong></td>
<td>Kenya</td>
<td>22</td>
</tr>
</tbody>
</table>

2013 SHORT PROGRAMMES (PROGRAMMES SHORTER THAN THREE MONTHS)

3. Three of the five ITPs offered short programmes (programmes shorter than three months). These were the same three ITPs who had enrolled Study Abroad students.

4. Of the three ITPs that offered short programmes, one had 13 students enrolled in short courses (with no students being on visitor visas), one had 141 (34 on visitor visas), and one had 169 (165 on visitor visas). One of those ITPs offered one short programme, one offered 15, and one did not respond.

5. Three ITPs listed the fields of study in which they offered short programmes. They mentioned the following fields of study:

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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.
* At ITP C the majority of ESOL short programmes were 'English plus' (e.g. English plus vocational teacher training, English plus business studies, etc.). The students do not usually seek a New Zealand qualification. Students include foreign English teachers, vocational teachers, university lecturers and university students.

**RECRUITMENT AND MARKETING**

**Levels of study**

6. ITPs were asked to rank the three levels of study they will most target when recruiting international students in 2014. Of the five ITPs, four said Bachelors degree was the most important, and one said Certificate/Diploma (Levels1-6) was the most important. One ITP added that they also targeted English language and foundation students who wanted to pathway through to Bachelors study. The following graph shows the number of times each level of study was mentioned in an ITP’s top three (one ITP only listed two levels):

**Figure 1: Priority levels of study for international student recruitment**
**Disciplines of study**

7. All five ITPs promoted their strengths in particular fields of study/disciplines.

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

![Figure 2: Disciplines ITPs promote during international student recruitment and the number of ITPs that promote each discipline](image)

**Recruitment and marketing tools**

9. A range of recruitment and marketing tools were used by the ITPs. The following were used by all five:
   - offshore education agents
   - onshore education agents
   - fairs and expos
   - New Zealand specialist agents
   - high-level Memoranda of Understanding (MoU).

**Agents**

10. When asked what proportion of their international students was recruited by agents, three ITPs answered between 71-80%, one answered between 51-60%, and one answered between 11-20%.

**Preferred tools**

11. The tools that most ITPs found the most effective (when asked which three tools were the most effective) were offshore education agents, onshore education agents, New Zealand specialist agents, fairs and expos, and high-level MoU.

12. Tools with a high level of disparity between use and perceived effectiveness included onshore education agents, social media, alumni, advertisements, feeder institutions, and high-level MoU. This is charted in the graph below:
13. Other tools used in recruitment included regional education group special missions, sister city relationships, and local cultural events. One ITP listed its website among its most effective recruitment tools.

**Social media**

14. Facebook, LinkedIn, and Youtube were the social media platforms most used by ITPs, although as mentioned above, ITPs did not find them to be particularly effective. One ITP also used social media platforms popular in their priority countries such as China, India and South Korea.

15. All five ITPs stated that Facebook was the most effective social media platform (although one ITP noted that it was difficult to measure effectiveness of social media). ITPs said of Facebook that it was the largest and easiest social media platform to access, and students are avid users of it. It was used to stay in contact with current students and alumni as well as to make contact with prospective new students.

16. All ITPs stated that they had a web-page dedicated to international students. All ITP websites were hosted in New Zealand.
Regional education promotional groups
17. All five ITPs reported that they were part of a regional education promotion group. They included:
   • Study Auckland (three ITPs)
   • Christchurch Educated (two)
   • Auckland Chamber of Commerce
   • International Manager Programmes
   • Independent Tertiary Education New Zealand
   • International Education Manawatu.

18. All five ITPs indicated that they participate in education promotion activities organised by the regional group to which they belong.

Use of international partnerships to recruit students
19. Three of the five ITPs said they leverage off other international partnerships to recruit international students (excluding international network memberships, MoUs and twinning arrangements). These included:
   • a partnership with another ITP running an offshore liaison office in Bangalore, India
   • the Lincwantok Scholarship Programme (Western Province, Papua New Guinea)
   • the SWB Programme in Brazil
   • the New Zealand Aid Programme
   • offshore government scholarship programmes.

Onshore recruitment
20. All five ITPs actively recruited international students in New Zealand. All recruited from high schools, English language schools, and other onshore tertiary education organisations. One recruited from non-ESOL PTEs and another recruited from website enquiries.

21. On average ITPs recruited more international students offshore than onshore, with ITPs recruiting between 50% and 95% of international students offshore.

Effectiveness of Government agencies in supporting international student recruitment
22. ITPs ranked organisations in terms of effectiveness in supporting their marketing and recruitment of international students on a scale of 1 (not effective) to 4 (highly effective). The following graph shows the average rating across the ITPs’ answers for each organisation:
PROMOTION OF WORK RIGHTS

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

PASTORAL CARE AND ASSISTANCE FOR INTERNATIONAL STUDENTS

24. All five ITPs indicated that they had an institutional strategy/plan that aimed to ensure sufficient care and support for international students.

Support for staff
25. All five ITPs provided cross-cultural training for staff members who may come in direct contact with international students.

26. Types of training include:
   - staff workshops (three ITPs)
   - training in cultural differences/cultural norms (two – one ITP mentioned a specific focus on training staff on working with Muslim students)
   - staff orientation (one).

Support for international students
27. ITPs offered a range of support targeted at international students.
   - All five ITPs offered:
     - orientation on studying and living in New Zealand in general, and the institution in particular
     - language support, including ESOL support
     - referral services, including health or financial counselling, banking, accommodation etc.
     - 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.
   - Four ITPs offered special support to meet international students’ cultural/religious needs. One ITP added that it ran an activities programme and an events programme for international students.
English language assistance available to international students

28. After admission into their chosen academic programme, ITPs offered international students several types of English language assistance, as illustrated in the graph below:

Figure 6: English language assistance available to international students

29. One ITP added that it also ran an academic reading and writing elective in the first semester of study and a modular Foundation Learning Programme that meets the needs of the individual student.

Advice on working while studying and working after study

30. ITPs offered a range of advice for international students on working while studying and working after study

- All five ITPs provided advice for international students on their entitlements under the employment law and regulations.
- Four out of the five ITPs provided:
  - career advice/support to international students for finding part-time jobs while studying
  - career advice/support for international students while studying to find employment post-study.
- Two out of the five ITPs provided career advice/support for international graduates after graduation to find employment post-study.
- One out of the five ITPs provided advice or referrals for international graduates to settle permanently in NZ.
- One ITP added that it provides a series of free workshops over four weeks called "Finding Work in New Zealand", saying that these have been very successful and involve employers, graduates in employment, and Immigration New Zealand (INZ). The workshops are organised by their career centre and the international office and student support team.

Dissemination of information about the Code of Practice for Pastoral Care

31. To ensure that international students are aware of the Code of Practice for Pastoral Care of International Students and in particular the grievance procedures, ITPs offered several measures, illustrated by the following graph.
Figure 7: Dissemination of information about the Code of Practice for Pastoral Care

Student satisfaction surveys
32. All five ITPs participated in international student satisfaction surveys. One participated twice a year and four participated once a year.

33. Three ITPs specified that they participated in i-Graduate International Student Barometer surveys, and three mentioned that they ran in-house surveys of international students. Students at one ITP also participated in surveys run by the regional education promotion group.

INTERNATIONAL ALUMNI

34. Two of the five ITPs said they had international alumni chapters or networking groups. The locations of those alumni groups and their characteristics are listed below:

<table>
<thead>
<tr>
<th>Size</th>
<th>ITP A</th>
<th>ITP B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Largest</td>
<td>China</td>
<td>New Zealand</td>
</tr>
<tr>
<td>Second largest</td>
<td>India</td>
<td>Laos</td>
</tr>
<tr>
<td>Third largest</td>
<td>South Korea</td>
<td>Cambodia</td>
</tr>
<tr>
<td>Other locations</td>
<td>Brazil, Colombia, Fiji, Japan, Russia, Saudi Arabia, Vietnam</td>
<td></td>
</tr>
</tbody>
</table>

35. ITP A reported that its most active alumni groups were in China, then India, and then South Korea. ITP B said that its most active alumni group was in New Zealand.

36. Both ITPs organised separate alumni functions for international students living in New Zealand and international students who had returned to their home country.

37. Both ITPs were working on developing an annual calendar of alumni events, with one adding that at present it only published those events based in New Zealand.

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3 One of the ITPs that said that its alumni groups are usually programme-specific and involve both domestic and international students.
38. At ITP A, alumni events were hosted by students or agents. ITP B hosted its own alumni events.\textsuperscript{4}

39. Both ITPs sought feedback from alumni, in terms of:
   • satisfaction with their study experience
   • how their study has benefitted their career
   • whether they wish to remain engaged
   • the quality of their engagement (e.g. events, benefits and services).

40. Both ITPs actively engaged international student alumni in student recruitment. ITP A also engaged alumni in pre-departure briefings for incoming international students, career mentoring and the provision of internships.

Connecting with alumni
41. ITPs identified the main challenge to maintaining connections with alumni to be a lack of resources.

42. ITP A found the following to be of most use in maintaining connections with alumni:
   • webpage use
   • social media
   • email
   • face-to-face contact.

43. ITP B said that it was keen to develop in the area of alumni relationships and to learn more about effective tools for maintaining contact. A key cohort for this ITP was its former NZAID students.

QUALIFICATION RECOGNITION

44. Three ITPs had found that some of their international students’ New Zealand qualifications had not been recognised on returning to their home country or another country. This happened in relation to employment (three ITPs), further study (two), and funding from banks (one). Countries in which this had occurred were Brazil, China, Fiji, Germany, India, Indonesia, Japan, Malaysia, Russia, Saudi Arabia, South Korea, Sri Lanka, Thailand, and Vietnam. One ITP added that it experienced qualification recognition problems in British Commonwealth countries.

45. Recognition problems included lack of international benchmarks for comparisons, lack of recognition of Graduate diplomas, foreign governments not recognising degree qualifications for jobs in government, and foreign governments not recognising degrees for scholarship students.

46. One ITP resolved these problems at peak body level and at individual level with the assistance of the New Zealand Qualification Authority (NZQA) and INZ. Another ITP joined the International Association of Universities and by meeting their membership requirements got their degrees approved. This ITP added that ITP qualifications are not readily recognised overseas with ITP degrees not seen as equal to university degrees. It added that it would be useful if NZQA talked more in terms of “degree entry” rather than

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\textsuperscript{4} Neither ITP regularly conducted fundraising with international alumni, produced an electronic publication/newsletter for alumni or had an alumni web page. Nor did they provide ‘life-long’ services/benefits for alumni.
“university entry requirements,” and that information on the New Zealand Qualifications Framework (NZQF) should be more readily available.

**OFFSHORE DELIVERY**

47. Three of the five ITPs reported to be involved in offshore delivery. The two ITPs who did not offer offshore delivery said that they had no plans to do so in the near future.

**Bilateral academic credit recognition**

48. All three ITPs 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 their institution. Two listed the countries with which they had bilateral academic credit arrangements:

- China (two ITPs)
- Germany (one)
- India (one)
- Japan (one)
- Malaysia (one)
- South Korea (one)
- United Kingdom (one)
- United States of America (one).

49. One ITP added that bilateral academic credit recognition was a big focus for future development.

**Offshore delivery through a partner institution**

50. One ITP delivered its qualifications or components of those qualifications at other institutions but using its own staff, in China and India.

**Offshore training and consultancy services**

51. One ITP also delivered vocational teacher training and consultancy and English language teacher training and consultancy services in a range of countries, most recently in Saudi Arabia.5

**Joint arrangements with offshore institutions**

52. Three ITPs engaged in twinning/articulation programmes; one engaged in jointly taught programmes; and one engaged in jointly awarded qualifications.

**Distance education**

53. Only one ITP offered distance education programmes to international students offshore, using: online course materials and course administration, and online forums for student/student and student/teacher discussions. These programmes were offered globally.

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

54. The ITP who delivered courses at institutions in India and China using its own staff had implemented the NZQF Offshore Programme Delivery Rules.

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5 None of the respondent ITPs delivered their qualifications or components of those qualifications at their own offshore campus. Nor did any commission or franchise offshore institutions to deliver their qualifications or components of those qualifications on their behalf.
55. The ITP whose offshore delivery comprised training and consultancy services said it had not implemented these rules because its clients are interested in training or consultancy services rather than qualifications.

56. Two ITPs had quality assurance rules or procedures in addition to the NZQF Rules. None of the ITPs had pastoral care arrangements in place for offshore students.

FUTURE PLANS FOR OFFSHORE DELIVERY

57. Of the three ITPs currently involved in offshore delivery two ITPs had plans to expand their offshore delivery. Future plans for delivery for all three ITPs are recorded in the table below:

<table>
<thead>
<tr>
<th>Countries for planned expansion</th>
<th>ITP A</th>
<th>ITP B</th>
<th>ITP C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colombia</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Vietnam</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>China</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fiji</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>India</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indonesia</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Malaysia</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Philippines</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Singapore</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>South Korea</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sri Lanka</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taiwan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thailand</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Level of study for future delivery</th>
<th>ITP A</th>
<th>ITP B</th>
<th>ITP C</th>
</tr>
</thead>
<tbody>
<tr>
<td>-</td>
<td></td>
<td>Certificates/Diplomas (Level 5-7)</td>
<td>Bachelors degrees (Level 7)</td>
</tr>
</tbody>
</table>

58. Three had plans to deliver the following fields of study offshore as illustrated by the graph below:

Figure 8: Fields of study considered for expansion of offshore delivery
OVERALL PRIORITIES FOR INTERNATIONAL STUDENT RECRUITMENT

59. ITPs were asked to rank the marketing and recruitment priority that they gave to particular categories of international students, from 1 (highest) to 5 (lowest).

60. A key trend is that onshore on-campus students are the highest priority for all respondents, and that offshore off-campus is either the lowest or second to lowest priority. The three that answered gave the following average rankings:

Figure 9: ITP international student recruitment priorities
PART TWO: INTERNATIONAL STUDENT DATA

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

TOTAL INTERNATIONAL ITP STUDENT NUMBERS

2. Total international student enrolments at New Zealand ITPs increased 6.7% between 2009-2013.

3. The graph below shows the total number of international students enrolled at New Zealand ITPs onshore and offshore, by year in 2009-2013. The graph shows:
   • onshore numbers increased 14.7% between 2009-2013
   • offshore numbers decreased 27.2% between 2009-2013.

Figure 10: Onshore and offshore international student numbers at ITPs 2009-2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Onshore</th>
<th>Offshore</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>9,430</td>
<td>2,280</td>
</tr>
<tr>
<td>2010</td>
<td>10,430</td>
<td>1,980</td>
</tr>
<tr>
<td>2011</td>
<td>10,870</td>
<td>1,780</td>
</tr>
<tr>
<td>2012</td>
<td>11,170</td>
<td>1,700</td>
</tr>
<tr>
<td>2013</td>
<td>10,820</td>
<td>1,660</td>
</tr>
</tbody>
</table>

DISTRIBUTION OF INTERNATIONAL STUDENTS ACROSS TERTIARY EDUCATION ORGANISATIONS

4. In 2013 ITPs attracted 25.4% of all international students enrolled in Government-funded TEOs including Private Training Establishments (PTEs) who receive Government tuition subsidies. The data excludes those PTEs that do not receive Government subsidies and all non-formal learning and on-the-job industry training.
5. ITPs’ share of the international student market compared with universities and Government-funded PTEs has decreased very slightly over the last five years, from 26.3% in 2009 to 25.4% in 2013. This decrease is not statistically significant.

**Figure 11: Distribution of international students across Government-funded TEOs in 2013**

**Figure 12: International student numbers across universities, ITPs and Government-funded PTEs 2009-2013**

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Universities</strong></td>
<td>22,340</td>
<td>22,950</td>
<td>23,060</td>
<td>23,410</td>
<td>24,230</td>
</tr>
<tr>
<td><strong>ITPs</strong></td>
<td>11,560</td>
<td>12,340</td>
<td>12,600</td>
<td>12,480</td>
<td>12,340</td>
</tr>
<tr>
<td><strong>PTEs</strong></td>
<td>10,900</td>
<td>10,870</td>
<td>12,980</td>
<td>12,370</td>
<td>11,990</td>
</tr>
</tbody>
</table>
6. In 2013 the two main sources of international students at ITPs were China and India, with Saudi Arabia, the Philippines, and Korea coming third, fourth, and fifth. The graph below charts the top 11 source countries for international students:

Figure 13: Top eleven international intramural onshore student numbers in New Zealand ITPs 2013

7. The period between 2009 and 2013 saw a significant increase in international students from Sri Lanka, Saudi Arabia, Philippines, China, and India, and a decline in international students from Fiji, South Korea, and Japan.

Source Country Trends 2009-2013

Percentage increase between 2009-2013

- Sri Lanka: 216.7%
- Saudi Arabia: 118.2%
- Philippines: 91.7%
- China: 39.2%

Percentage decrease between 2009-2013

- Fiji: 28.1%
- South Korea: 20.8%
- Japan: 19.6%
8. Student numbers from China, India, and the Philippines peaked in 2012, and then declined slightly in 2013. The decline in students from South Korea is consistent with trends across the tertiary sector.

Figure 14: International intramural onshore student numbers from top 10 source countries in NZ ITPs 2009-2013

<table>
<thead>
<tr>
<th>Country</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>2,630</td>
<td>3,000</td>
<td>3,660</td>
<td>3,780</td>
<td>3,860</td>
</tr>
<tr>
<td>India</td>
<td>2,690</td>
<td>2,910</td>
<td>2,930</td>
<td>2,990</td>
<td>2,850</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>220</td>
<td>360</td>
<td>550</td>
<td>530</td>
<td>480</td>
</tr>
<tr>
<td>Philippines</td>
<td>240</td>
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<td>Korea</td>
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<td>420</td>
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<td>Japan</td>
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<td>260</td>
<td>220</td>
<td>230</td>
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<tr>
<td>Sri Lanka</td>
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<td>90</td>
<td>140</td>
<td>170</td>
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</tr>
<tr>
<td>UK</td>
<td>190</td>
<td>130</td>
<td>140</td>
<td>170</td>
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</tr>
<tr>
<td>Vietnam</td>
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<td>190</td>
<td>180</td>
<td>180</td>
<td>190</td>
</tr>
</tbody>
</table>

NUMBERS OF INTERNATIONAL STUDENTS STUDYING IN NEW ZEALAND ITPS BY LEVEL OF STUDY

9. 27% of international students are studying at Bachelors level and 27% are studying Certificates/Diplomas (Levels 5-7). The next largest cohorts of international students were those studying Level 4 Certificates and Graduate certificates/diplomas. The proportions of international student numbers across all levels of ITP study are illustrated by the graph below:
Level of study trends
10. Between 2009 and 2013 international student numbers increased significantly at almost every level of study: Honours/Postgraduate certificates/diplomas, Graduate certificates/diplomas, Masters, and Bachelors.

11. The number of international students studying Certificates/Diplomas (Levels 5-7) decreased steadily between 2009 and 2013. This decrease may be linked to the increase in Graduate certificates/diplomas over the same period, with students electing to study these higher level qualifications instead.

12. Very few international students are enrolled in PhD study because only one ITP offers PhD programmes.

### Percentage increase between 2009-2013
- Honours/Postgraduate certificates/diplomas: 144.4%
- Graduate certificates/diplomas: 124.7%
- Masters: 100%
- Bachelors: 58.7%

### Percentage decrease between 2009-2013
- Certificates/Diplomas 5-7: 12.2%
14. ITP trends in field of study were broadly similar whether analysed by EFTS or student numbers. This contrasts with field of study trends for universities and PTEs, where quite different trends emerged depending on which metrics were used. This suggests that at ITPs there is more consistency in course length across all fields of study.

15. When analysed by total number of students, management and commerce was the most popular field of study followed by society and culture, and then health. This is demonstrated by the graph below:
16. When broken down by EFTS, engineering replaces health as the third most popular field of study, and food and hospitality swaps places with creative arts to become sixth most popular field of study.
Field of study trends – by intramural onshore student numbers

17. Figure 19 shows that between 2009 and 2013 the number of international students studying management and commerce, engineering, and food and hospitality increased steadily. The number of international students studying information technology and creative arts remained stable over the period, excepting a peak in both in 2010. Up until 2012 society and culture was the most popular field of study when measured by international student numbers. The numbers dropped in 2013 to just below 2009 figures.

Figure 19: International intramural onshore student numbers in NZ ITPs by field of study (course NZSCED) 2009-2013
Field of Study Trends – by intramural onshore EFTS

18. When analysed by EFTS, sharper trends emerge. EFTS in health, management and commerce, and engineering increased more significantly while the percentage increase in food and hospitality was less marked.

<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>Management &amp; commerce</td>
<td>3,020</td>
<td>3,710</td>
<td>3,880</td>
<td>3,940</td>
<td>4,180</td>
</tr>
<tr>
<td>Society &amp; culture</td>
<td>3,600</td>
<td>3,990</td>
<td>4,450</td>
<td>4,140</td>
<td>3,540</td>
</tr>
<tr>
<td>Health</td>
<td>1,180</td>
<td>1,310</td>
<td>1,750</td>
<td>1,970</td>
<td>1,840</td>
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<tr>
<td>Engineering</td>
<td>1,040</td>
<td>1,100</td>
<td>1,130</td>
<td>1,250</td>
<td>1,360</td>
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<tr>
<td>IT</td>
<td>1,390</td>
<td>1,550</td>
<td>1,340</td>
<td>1,310</td>
<td>1,340</td>
</tr>
<tr>
<td>Creative arts</td>
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<td>1,320</td>
<td>1,070</td>
<td>1,040</td>
<td>1,050</td>
</tr>
<tr>
<td>Food &amp; hospitality</td>
<td>700</td>
<td>710</td>
<td>680</td>
<td>800</td>
<td>910</td>
</tr>
<tr>
<td>Sciences</td>
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<td>530</td>
<td>710</td>
<td>540</td>
<td>630</td>
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<tr>
<td>Architecture</td>
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<td>260</td>
<td>320</td>
<td>340</td>
<td>410</td>
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<tr>
<td>Education</td>
<td>270</td>
<td>300</td>
<td>340</td>
<td>310</td>
<td>300</td>
</tr>
<tr>
<td>Agriculture &amp; environment</td>
<td>210</td>
<td>140</td>
<td>170</td>
<td>130</td>
<td>220</td>
</tr>
<tr>
<td>Mixed field studies</td>
<td>200</td>
<td>230</td>
<td>200</td>
<td>110</td>
<td>180</td>
</tr>
</tbody>
</table>

Percentage increase between 2009-2013

<table>
<thead>
<tr>
<th>Field of Study</th>
<th>Percentage</th>
<th>EFTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health</td>
<td>55.9%</td>
<td>63.4%</td>
</tr>
<tr>
<td>Management &amp; commerce</td>
<td>38.4%</td>
<td>55.4%</td>
</tr>
<tr>
<td>Engineering</td>
<td>30.8%</td>
<td>49%</td>
</tr>
<tr>
<td>Food &amp; hospitality</td>
<td>30%</td>
<td>10.8%</td>
</tr>
</tbody>
</table>

Figure 20: International intramural onshore EFTS in NZ ITPs by field of study (course NZSCED) 2009-2013
NUMBERS OF INTERNATIONAL STUDENTS STUDYING IN NEW ZEALAND ITPS ON RECOGNISED EXCHANGE SCHEMES

19. The number of students coming to New Zealand ITPs on exchange schemes decreased by 8% between 2009 and 2013. This data also comes from the SDR.

20. ITPs attract a small proportion of the total number of tertiary students on exchange schemes. However their share of this market has increased slightly over the last five years, from 6.6% in 2009 to 8.5% in 2013.

21. The overall decline in international students coming to New Zealand on exchange schemes, together with ITPs’ slightly increasing share of international exchange students, are reflected in the graph below:

Figure 21: International intramural onshore students in NZ universities and ITPs on recognised exchange schemes 2009-2013

<table>
<thead>
<tr>
<th>Management &amp; commerce</th>
<th>1,390</th>
<th>1,780</th>
<th>1,880</th>
<th>1,990</th>
<th>2,160</th>
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</thead>
<tbody>
<tr>
<td>Society &amp; culture</td>
<td>1,420</td>
<td>1,480</td>
<td>1,790</td>
<td>1,550</td>
<td>1,320</td>
</tr>
<tr>
<td>Health</td>
<td>410</td>
<td>450</td>
<td>610</td>
<td>820</td>
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<tr>
<td>Engineering</td>
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<td>590</td>
<td>620</td>
<td>720</td>
<td>760</td>
</tr>
<tr>
<td>IT</td>
<td>700</td>
<td>790</td>
<td>660</td>
<td>670</td>
<td>670</td>
</tr>
<tr>
<td>Creative arts</td>
<td>310</td>
<td>340</td>
<td>330</td>
<td>320</td>
<td>320</td>
</tr>
<tr>
<td>Food &amp; hospitality</td>
<td>370</td>
<td>370</td>
<td>300</td>
<td>320</td>
<td>410</td>
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<tr>
<td>Sciences</td>
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<tr>
<td>Architecture</td>
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<tr>
<td>Education</td>
<td>100</td>
<td>130</td>
<td>140</td>
<td>130</td>
<td>110</td>
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<tr>
<td>Agriculture &amp; environment</td>
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<tr>
<td>Mixed field studies</td>
<td>20</td>
<td>30</td>
<td>30</td>
<td>20</td>
<td>20</td>
</tr>
</tbody>
</table>
**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.