

STUDYMOVE

PRESS RELEASE

STUDYMOVE completes the second International Education Benchmark for New Zealand.

November 8, 2017 – The second comprehensive benchmark analysis of international student recruitment and international mobility strategies for New Zealand universities was recently presented in Auckland. The benchmarks objective is to provide an annual comprehensive dataset which provides New Zealand universities with a detailed analysis of their internationalisation strategies at the national and individual university level.

The analysis was developed by Studymove Education Consultants with the support of Education NZ, Universities New Zealand - Te Pūkai Tara and all eight New Zealand universities. The report includes a comprehensive analysis of international operations including international office budgets and how human and financial resources are allocated within each university. It also provides a comprehensive view of current and future recruitment opportunities for the New Zealand international education industry.

An important element of this exercise was also the inclusion of international student mobility strategies. There is great interest among New Zealand Universities and the New Zealand Government to increase the opportunities for students to undertake a learning abroad experience and the report gives a very interesting insight that will be useful for future policy development at all levels.

OVERVIEW

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 2017, the comprehensive international education benchmark was conducted for the second time in conjunction with Education New Zealand and Universities New Zealand - Te Pūkai Tara. It benchmarks all eight New Zealand universities.

This benchmark analysis supports the development of international education strategies for all eight New Zealand universities and aims to assist in the creation of government policies in the future. The report allows universities to anonymously compare their strategies, overall operations and performance of both international student recruitment and international student mobility.

International education is an important enabler in strengthening New Zealand's economic, cultural and social links with the world. The value of the international education industry reached NZ\$4.28 billion in 2015/16 according to a report produced by Infometrics and the National Research Bureau and released by Education New Zealand (ENZ). This signified a 50 per cent increase over the previous estimate of its value in 2014 and International student numbers are increasing across almost all sectors of the industry.

INTERNATIONAL STUDENT RECRUITMENT

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.

Revenue

The eight New Zealand universities generated an aggregate revenue of \$391.3 million from international student fees (on-campus) in 2016. This represented an increase of 7.9% in comparison with 2015.

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

Growth in international student enrolments

In 2016, the eight universities reported an aggregate of 26,442 international student enrolments on-campus representing an increase of 10.3% in comparison to the 23,967 student enrolments reported in 2015. From the total, 46% were undergraduate students, 19% were postgraduate students, 18% were research students, 14% were study abroad and exchange students and 3% were unknown.

Percentage of international students on campus

In 2016, all eight universities reported an aggregate of 166,687 student enrolments of which 26,442 were international students which represents 16% of the student population.

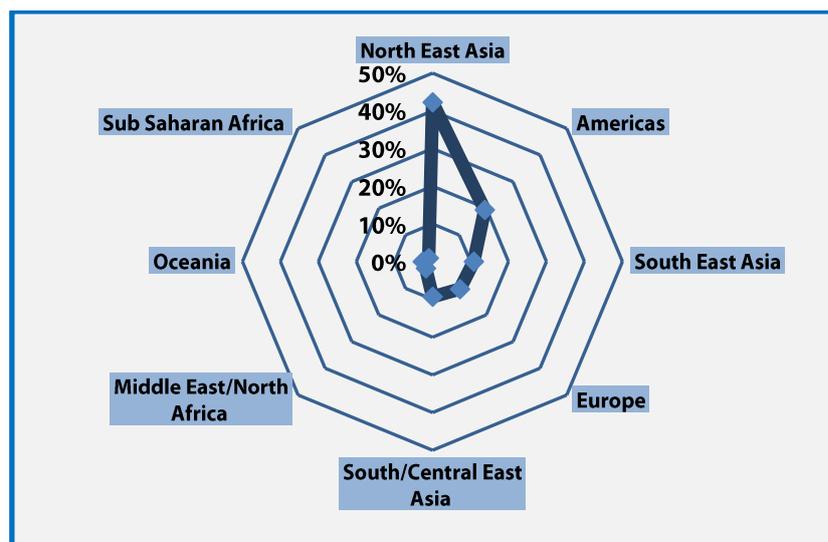
Where has growth come from?

All eight universities reported the nationality of international students from more than 57 countries in 2016.

In 2016, China was the largest source country with 4,644 international students, which represents 36.6% of the total. United States, India, Malaysia and Japan follow representing together 30.4% of the total. These top 5 markets represent almost 67.1% of the total number of international students recruited in 2016.

In 2016, the top regions for the recruitment of international students in aggregate were North East Asia with 43.0%, Americas with 19.4% and South-East Asia with 11.4%.

Distribution of commencing international students by region (New Zealand, 2016)



Agents

Seven New Zealand universities provided information on the number of students recruited by agents. In 2016, the average proportion of students via agents for this group of universities was 38.7% and the median was 33.8%.

In 2016, universities paid only 3.7% of their total generated revenue in commissions to education agents. Considering a different metric, universities invested NZ\$1,234 in commissions for every international commencement in 2016.

INTERNATIONAL STUDENT MOBILITY

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. It also supports the management and development of outbound and incoming student mobility strategies.

An important part of the project was to analyse the student participation rate in Outbound Mobility programs, defined as all international activities (credit and non-credit) recorded by the university. We requested information on the total number of students that undertook outbound mobility programs over several categories and during the period of 2015 and 2016.

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 2,874 students who participated in Outbound Mobility programs during 2016 in comparison with 2,551 students in 2015. 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 4.3% during 2016 in comparison with 4.8% in 2015 for all students. For undergraduate students, the aggregate participation rate in 2016 was 6.1% in comparison to 8.5% in 2015.

Where are they going?

All eight universities reported the destination of a total of 2,015 undergraduate and postgraduate students from 72 destinations in 2016. This total included also 1,753 undergraduate students and 262 postgraduate students.

In 2016, the top 25 destinations for students in Outbound Mobility Programs (undergraduate and graduate) were United States of America, United Kingdom, China, Canada, Australia, Japan, Do not know/other, Netherlands, France, Korea (South), Singapore, India, Denmark, Germany, Sweden, Italy, Spain, Hong Kong, Macau, Vietnam, Thailand, Indonesia, Malta, Samoa and Multi-Destination.

The top 5 destinations represented 44% of the total and the top 25 made up 87% of all destinations in 2016.

When grouped by regions, Asia was the most popular region for Outbound Mobility students in 2016. In 2016, the average for Asia as a region was 33.8% in comparison with 24.4% in 2015. Europe was the second most popular region in 2016 with an average of 29.6% in comparison with 34.7% in 2015.

Percentage of destinations by regions (New Zealand, 2016)

REGION	Aggregate 2016
Asia	29.1%
Central America and the Caribbean	0.1%
Europe	32.7%
Middle East and North Africa	0.6%
North America	20.3%
Oceania	8.6%
Other (Includes Multi-Destination and Do not know)	5.8%
South America	1.2%
Sub-Saharan Africa	1.6%
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 76.9% of students participating in for-credit Outbound Mobility Programs in 2016 in comparison with 75.0% students reported in 2015.

Study Level

In 2016, a total of 1,740 were undergraduate students which represents 86.7% of the total and 258 were postgraduate students which represents 12.9% of the total.

Field of Study

Seven universities reported on the number of New Zealand citizens or permanent residents that participated in Outbound Mobility Programs.

In 2016, the top fields of study for undergraduate and postgraduate students in order of popularity were Management and Commerce (25.7%), Society and Culture (22.6%), Health (14.0%), Engineering and Related Technologies (10.4%), Natural and Physical Sciences (8.2%), Creative Arts (8.0%), Do not know (3.2%), Other (1.8%), Architecture and Building (1.8%), Agriculture, Environmental and Related Studies (1.5%), Information Technology (1.3%), Mixed field programs (1.0%), Education (0.5%), Food, Hospitality and Personal Services (0.1%) and Undeclared (0.0%).

Percentage of major fields of study – Undergraduate and Postgraduate (New Zealand, 2016)

MAJOR FIELD OF STUDY	Aggregate 2016
Agriculture, Environmental and Related Studies	1.5%
Architecture and Building	1.8%
Creative Arts	8.0%
Education	0.5%
Engineering and Related Technologies	10.4%
Food, Hospitality and Personal Services	0.1%
Health	14.0%
Information Technology	1.3%
Management and Commerce	25.7%
Mixed Field Programmes	1.0%
Natural and Physical Sciences	8.2%
Society and Culture	22.6%
Undeclared	0.0%
Other (please specify below – put count here)	1.8%
Do Not Know	3.2%
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 2015 and 2016.

In 2016, from the 1,781 undergraduate and postgraduate students that the seven universities reported, 1,016 students or 57% of those students were female and 732 students or 41% of students were male students. In addition, universities reported that 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.

Mid-length programs (one semester) were the most popular with an aggregate of 48.9%. Universities reported 40.2% of students undertook a short-term program and 7.5% participated 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 2016, 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 2016, 17% 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 - Six 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.

Private funding - Universities reported on the amount of funding they received from private organisations or foundations in New Zealand to support outbound international mobility strategies. Two universities reported that they do not receive any private funding and three universities reported that this question did not apply to their university. Two universities reported that they do receive some funding from private organisations or foundations in New Zealand and that amount of private funding in 2016 varied from NZ\$17,000 to NZ\$20,000.

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. Five universities reported how much university funding was allocated to outbound international mobility, one university reported how much university funding was allocated to fund exchanges and two universities indicated that this question was not applicable to their university. The amount of institutional funding varied from NZ\$20,000 to NZ\$300,000 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 10 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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