

Education New Zealand Briefing

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| Title: | International Student Experience Survey 2019 | | |
| Date: | 2 March 2020 | Priority: | Medium |
| Security level: | Unclassified | ENZ ID no: | 1920-121 |

Action sought

| Addressee: | Action sought: | Deadline: |
|-----------------------|---|-----------|
| Minister of Education | <p>Note that 88% of international students rated their overall experience positively, with 86% likely to recommend New Zealand as a study destination.</p> <p>Note that the international students who studied in Dunedin (94%), Christchurch (90%) and Wellington (90%) were most positive about their overall experience.</p> <p>Agree that proactive publication of this briefing is deferred until after you announce the results of the research.</p> | |

Contact for telephone discussion (if required)

| Name: | Position: | Telephone: | Cell phone: | 1 st contact |
|-----------------|------------------------|------------|-------------|-------------------------|
| Grant McPherson | Chief Executive | [Redacted] | [Redacted] | |
| Angela Meredith | Accountability Manager | [Redacted] | [Redacted] | x |

The following departments/agencies have seen this report

| | | | | | |
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| <input type="checkbox"/> ERO | <input type="checkbox"/> MBIE | <input type="checkbox"/> MFaT | <input type="checkbox"/> MoE | <input type="checkbox"/> MoH | <input type="checkbox"/> MSD |
| <input type="checkbox"/> NZQA | <input type="checkbox"/> NZTE | <input type="checkbox"/> TEC | <input type="checkbox"/> TPK | <input type="checkbox"/> Treasury | <input type="checkbox"/> |

Minister's office to complete

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|-----------------------------------|--|---|---------------------------------------|
| <input type="checkbox"/> Approved | <input type="checkbox"/> Declined | <input type="checkbox"/> Noted | <input type="checkbox"/> Needs change |
| <input type="checkbox"/> Seen | <input type="checkbox"/> Overtaken by events | <input type="checkbox"/> See Minister's notes | <input type="checkbox"/> Withdrawn |

Comments:

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Recommendations

Education New Zealand recommends that you

- a. **note** that 88% of international students rated their overall experience positively, with 86% likely to recommend New Zealand as a study destination
- b. **Note** that the international students who studied in Dunedin (94%), Christchurch (90%) and Wellington (90%) were most positive about their overall experience

Noted

- c. **agree** that proactive publication of this briefing is deferred until after you announce the results of the survey

Agree / Disagree



Grant McPherson
Chief Executive
Education New Zealand

Hon Chris Hipkins
Minister of Education

___/___/___

Purpose

1. The purpose of this briefing is to provide you with the results of 2019 research into international students' experience while studying in New Zealand.

Background

2. In 2019 international education was valued at \$4.94 billion and is New Zealand's fifth largest export sector, making an important contribution to the national and regional economies. More than 117,000 international students studied with New Zealand providers in 2018. These students make a valuable contribution to New Zealand's educational institutions, workplaces and society by building New Zealand's global linkages, filling skill shortages, enriching cultural diversity and bolstering the economy.
3. The success of the international education sector is dependent on international students having an excellent student experience, which goes beyond their classroom to their whole experience.
4. In previous years, the student experience has been measured using the International Student Barometer (ISB). The ISB is completed in students' first semester of study only. Only aggregated data for sub-sectors is presented and not all providers within a sub-sector take part in the survey. This means the insights gathered are not a full representation of the whole student experience.
5. In 2018, Education New Zealand (ENZ) decided to develop a New Zealand International Student Experience survey, which would be run annually and would survey international students from all sub-sectors who are studying across the country and are at varying points in their student journey. This is intended to provide richer insights and data to inform ENZ and other agencies' student experience work.
6. The survey was designed to track progress on the International Education Strategy goals as well as the success statements of the *International Student Wellbeing Strategy*. Findings from the survey will inform future student experience work stream development and implementation across agencies.
7. The three main aims of the survey were to:
 - better understand the overall student experience in New Zealand
 - identify what is being done well
 - identify where improvements can be made.
8. Between August and September 2019, ENZ commissioned research agency, Nielsen to undertake an online survey of international students. The survey was built around the conceptual model of 'experience drivers' developed in a previous study of international students and has been customised for different education sub-sectors and student journey stages.
9. Almost 8,000 people responded to the survey.
10. This inaugural survey is the first time in New Zealand that an international student experience survey has been conducted across the entire student journey (students who

have just arrived in New Zealand through to those who have recently completed their studies).

11. It surveyed international students from all sub-sectors (schools, universities, English Language schools, private training establishments and institutes of technology and polytechnics), and from across the country.
12. The survey results will be used as a benchmark for the future and allow ENZ to track progress in the student experience area.

International Student Experience Survey 2019

13. The overall satisfaction rate and the percentage of those who would recommend New Zealand as a study destination was very high, with 88% rating their overall experience positively and 86% were likely to recommend New Zealand as a study destination.
14. The top drivers of a student's overall experience rating depended upon the stage of the student journey they are at. For students who were currently studying, living experience was the number one driver, while those who had completed their tertiary studies it was education.
15. This is a positive outcome as it demonstrates that those who study in New Zealand have a good experience.
16. For 83% of students, New Zealand was their first choice of study destination. Students from the United States of America had the highest preference for New Zealand at 93% compared to China at 80% and Korea at 76%.
17. 'People and Connections' was the highest ranked aspect of the student experience (88% rated it positively). Unprompted, 52% commented on the friendliness of people in New Zealand, New Zealand ethics, inclusion and kiwi culture as a 'positive surprise'.
18. New Zealand's multiculturalism was also a positive surprise for students – with particular mention of the ability to experience Māori culture.
19. Of the nine top factors driving the decision to study in New Zealand, there is an equal balance between lifestyle and academic factors.
20. There is high endorsement of proof points that sit behind the Think New education brand positioning – growing and developing confidence, preparing to be a citizen of the world, helping encourage their curiosity and developing new ideas.

Other outcomes

21. The decision making of students to study in New Zealand is consistent with key *International Education Strategy* measures. Two of the top three decision making factors were associated with New Zealand's reputation as being safe, inclusive and welcoming.
22. Those that studied in Dunedin (94%), Christchurch (90%) and Wellington (90%) were the most positive about their experience.

23. When asked to consider whether their overall experience had met or exceeded expectations, students from the United States of America (87%), Europe (78%), Brazil (77%) and the Philippines (76%) said that it had.
24. Students were positive about their use of agents, with 83% of respondents saying their agent was a useful information source for them.
25. Whilst the sample pool was small (217 in total), private training establishment students are generally more positive about their experience and had the highest overall experience rating at 90%.

Areas for improvement

26. 68% of international students say that their New Zealand experience has met or exceeded expectations, while 23% said it somewhat met their expectations.
27. Unexpectedly high living costs contribute to a negative experience for international students.
28. Unprompted 'Suggestions to improve the experience' had 59% of students commenting on aspects of economic wellbeing. Areas for improvement were identified as:
 - finding and arranging acceptable accommodation
 - money management.
 - opportunities for work experience
 - improving visa processes.
29. ENZ is informing other agencies, peak bodies and sector partners of the results of the survey.

Next steps

30. ENZ is preparing a communications plan to support the release of the survey.
31. ENZ proposes to draft a media release on behalf of the Minister to announce the survey results, emphasising the positive experience we are giving international students, and how it aligns to the *International Education Strategy*. The release will be backed up by social media. It is suggested the media release is issued after the temporary entry restrictions are lifted.
32. After the announcement, the full research document will be released on IntelliLab so the New Zealand international education sector and government agencies can access it.
33. To make the survey results more accessible to a larger audience, ENZ will create smaller information resources, split by sub-sector. ENZ will also create an overview presentation that will give a snapshot of the complete picture.
34. ENZ staff will share key highlights with sector representatives and develop a plan to address the improvements highlighted by students with lead agencies and sector partners.

Proactive release

35. ENZ proposes to defer the proactive release of this briefing until after the results of the research are announced.

Proactively released