



# Education New Zealand Manapou ki te Ao

## The Insight Story

A data-based snapshot of the New Zealand international education sector

ISSN 2815-8113

April 2023



# THINK NEW<sup>™</sup>



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## NOTE

To read the Dig Deeper articles linked from this report you need to be registered with intellilab.

ENZRA agents, education providers and government agencies can register [here](#)





# Education New Zealand Manapou ki te Ao

**Education New Zealand Manapou ki te Ao (ENZ) is a Crown Agency with a dedicated focus on international education which delivers social, cultural, and economic benefits for all New Zealand.**

Our work ensures that international education provides enduring benefits for New Zealand by taking New Zealand education experiences to the world as well as supporting overseas and onshore study opportunities for New Zealanders.

# From ENZ Director Insights



## Kia ora tātou.

As we write our first edition of the Insight Story for 2023, we are thrilled to see the approved international student visas continue to increase and convert into valid international student visa holders.

A warm welcome to the thousands of international students commencing their study across New Zealand!

We are pleased to note that interest in New Zealand remains high:

- » Traffic to the Study with New Zealand website increased from around 75,000 users in November 2022 to around 295,000 users in February 2023.
- » International student visa application decisions completed each month have increased since October 2022. Over December 2022 to February 2023, Immigration New Zealand completed decisions on around 16,000 international students.
- » At the beginning of March 2023 there were nearly 34,000 international student visa holders, an increase of 98% since borders reopened.

A look at our English-speaking competitor destinations shows they are experiencing growth in the number of visas granted. Canada and the UK have experienced the largest increases in student visas, up 74% and 55% respectively in 2022 compared to 2019.

Overseas activity is also resuming in earnest. This edition we focus on our largest pre-pandemic market, China. Alongside insights from ENZ in-country staff we include the first of our refreshed Insight Dashboards for China.

Two other reports in this edition highlight the benefits of international education to New Zealand. The first looks at the benefits that New Zealanders told ENZ that international students bring New Zealand. The second looks at both the immediate and longer-term economic benefits of international education to New Zealand.

If you have any feedback on The Insight Story or suggestions for topics we should cover please get in contact at [intelligence@enz.govt.nz](mailto:intelligence@enz.govt.nz).

Ngā mihi nui

**Marie Clark, Director Insights**



### **E-News – ENZ's monthly e-mail newsletter**

The Insight Story keeps you updated on research, insights and trends from across the sector, but ENZ also sends out a monthly email newsletter that is useful for keeping up to date with industry and market developments and finding out about events, policy changes, and other reminders.

To find out more [click here](#).



# Student Attraction

**To be able to attract students to study with Aotearoa New Zealand we need to understand what we have to offer and what learners and markets need.**

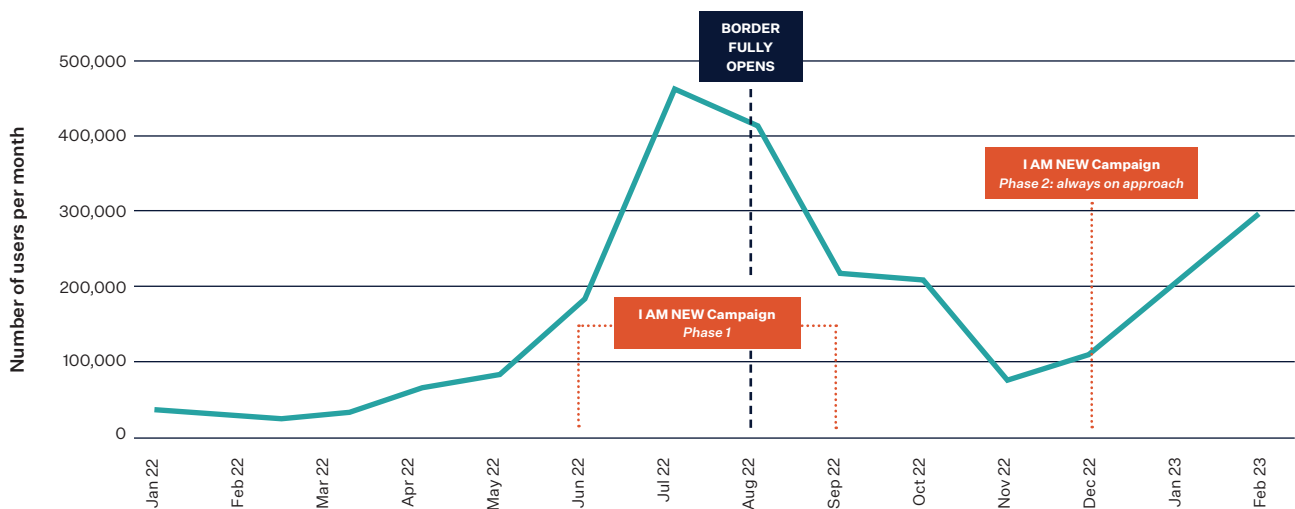
This chapter focuses on data and research related to the competitiveness of a New Zealand education, and student interest in a New Zealand education.

# Users from India make up increased proportions of Study with New Zealand's web traffic

**Traffic to the Study with New Zealand website has steadily increased over the last few months. Users from India have been the main driver for this increase, with website user numbers in February 2023 199% higher than three months prior in November 2022.**

Website activity is heavily influenced by our campaign activity in market. ENZ moved into Phase 2 of the I AM NEW campaign in December 2022 and since this time there has been an increase each month in users to the Study with New Zealand website.<sup>1</sup> In November 2022, there were around 75,000 users increasing to around 295,000 users in February 2023.


Study with New Zealand website users<sup>3</sup> per month, 1 Jan 2022-28 Feb 2023



The top website user country in February 2023 was India, followed by Viet Nam, Brazil, Thailand and Japan. Users from India made up 56% of all users in February 2023, whereas the second highest user country – Viet Nam made up 6% of users. Although India was the top website user country three months prior, in November 2022, they only made up 38% of all users.

In February 2023, of the top 10 user countries, six experienced a higher-than-average increase in users compared to three months prior, in November 2022.

The largest percentage increase in users over this period came from Brazil (1444%), followed by Japan (975%), Viet Nam (649%), India (497% increase), USA (422%), South Korea (394%), and Nigeria (327%) – compared to an average of 301% for all users.

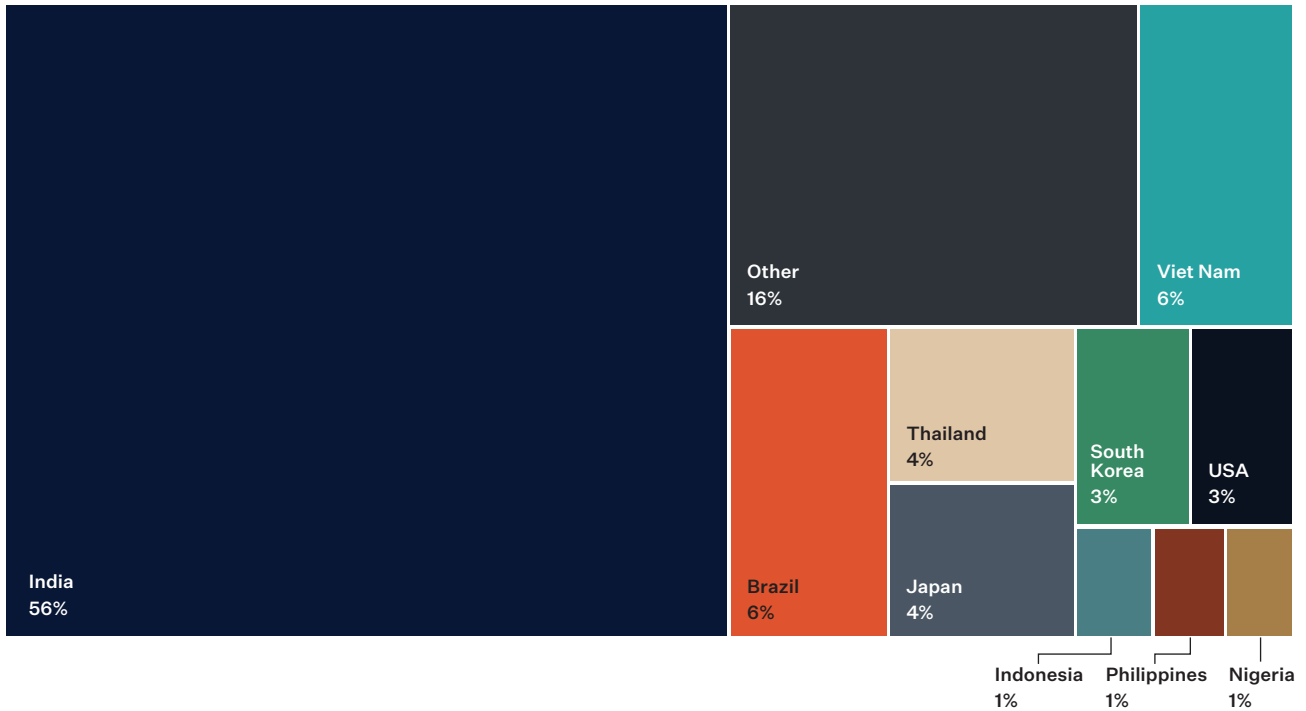


56%

of web traffic were from Indian users in February 2023, compared to 38% in November 2022

<sup>1</sup> Note that we have a separate website for China.

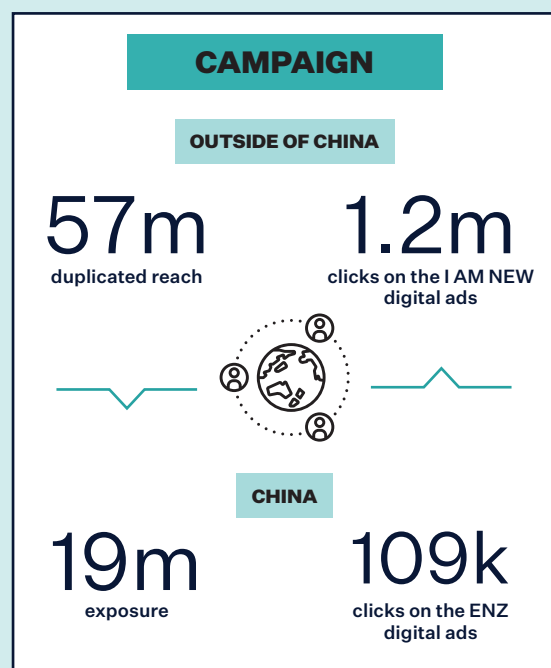
**Top 10 study with New Zealand website user countries, February 2023**



**The second phase of the I AM NEW campaign, ENZ’s brand campaign to raise awareness of New Zealand as an education destination, started on the 12th December 2022. This phase of the campaign has moved to an always-on approach and focusses on the individual stories of the students who starred in the campaign. Messaging centres on why they came to study in New Zealand, and the unique benefits a New Zealand education has provided them.**

Campaign activity targets potential international students (tertiary and schools year 9+) and their parents across ten markets: China, India, USA, Thailand, Viet Nam, Germany, Brazil, Japan, and South Korea.

Paid digital advertising placements – which included videos, banner ads and static social tiles – ran across Google, Facebook, Instagram, YouTube, TikTok, DV360, WeChat, and Bilibili.



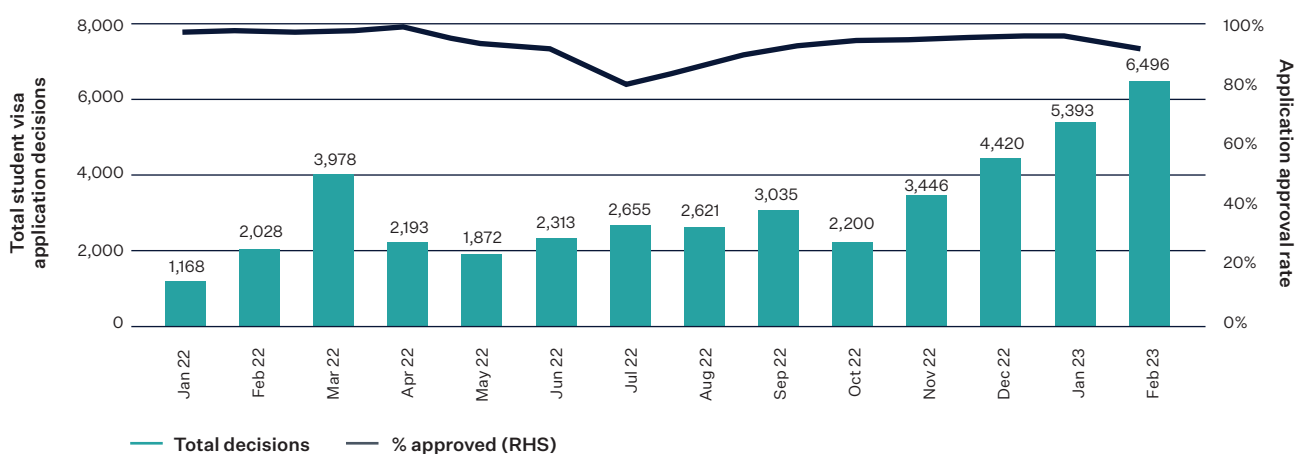
# Overall application approvals return to around two-thirds of pre-pandemic levels

**It is encouraging to see that the number of approved international student visa applications has steadily increased over recent months. In the three-month period (December 2022 to February 2023), the number of approved visas was around two-thirds the number that was approved over the same period pre-pandemic (December 2019 to February 2020).**

The number of international student visa application decisions completed each month has increased since October 2022. Over the most recent three months (December 2022 to February 2023), Immigration New Zealand completed decisions on around 16,000 international student visa applications (with an average approval rate of 95%), compared to nearly 25,000 (with an average approval rate of 92%) in the same period pre-pandemic (December 2019 to February 2020). Comparing these three-month time periods, overall international student visa application decisions are currently 34% lower.

All sectors have seen increases in the number of approved international student visa applications over the last few months, but, with the exception of universities, these are at lower levels than pre-pandemic. Approved applications for study at university are 4% higher in the three months December 2022 to February 2023, compared to the same period in 2019/2020.

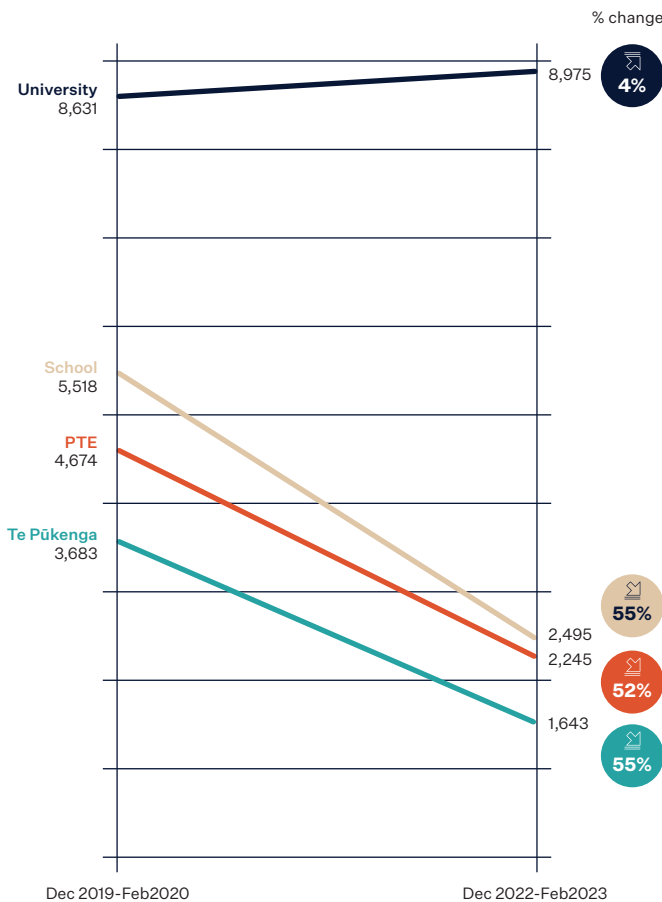
**Student visa application decisions and approval rates, January 2022 to February 2023**







**Approved international student visas by sector, Dec19 to Feb20 and Dec20 to Feb23**



Total approved student visa applications are 32% lower in December 2022 to February 2023 compared to December 2019 to February 2020. Students from China and India had the highest number of approved visa applications in both time periods (n=10,202 and n=7,253 respectively), but in the December 2022 to February 2023 period, approved applications from China are 8% lower than December 2019 to February 2020, whereas approved applications from India are 59% lower. Other nationalities, from the top 20, that have a lower-than-average number of approved student visas in December 2022 to February 2023 compared to December 2019 to February 2020 include: South Korea (51% lower), Thailand (67% lower) and Brazil (51% lower).

Of the top 20 nationalities, only two have higher numbers of approved student visas in December 2022 to February 2023 compared to December 2019 to February 2020 – Viet Nam and Malaysia are 17% and 4% higher respectively.

**Top 20 nationalities with approved student visa applications in December 2022 to February 2023 compared to pre-pandemic in December 2019 to February 2020**

| DECEMBER 2019 TO FEBRUARY 2020 |                       |                            | DECEMBER 2022 TO FEBRUARY 2023 |                       |                            |
|--------------------------------|-----------------------|----------------------------|--------------------------------|-----------------------|----------------------------|
| NATIONALITY                    | APPROVED APPLICATIONS | % OF APPROVED APPLICATIONS | NATIONALITY                    | APPROVED APPLICATIONS | % OF APPROVED APPLICATIONS |
| Total                          | 27,727                | 100%                       | Total                          | 15,441                | 100%                       |
| China                          | 6,083                 | 27%                        | China                          | 5,576                 | 36%                        |
| India                          | 4,119                 | 18%                        | India                          | 1,677                 | 11%                        |
| South Korea                    | 1,646                 | 7%                         | Japan                          | 917                   | 6%                         |
| Japan                          | 1,482                 | 7%                         | USA                            | 842                   | 5%                         |
| USA                            | 1,231                 | 5%                         | South Korea                    | 812                   | 5%                         |
| Thailand                       | 912                   | 4%                         | Viet Nam                       | 689                   | 4%                         |
| Viet Nam                       | 590                   | 3%                         | Hong Kong                      | 378                   | 2%                         |
| Brazil                         | 574                   | 3%                         | Malaysia                       | 333                   | 2%                         |
| Hong Kong                      | 462                   | 2%                         | Thailand                       | 304                   | 2%                         |
| Germany                        | 418                   | 2%                         | Brazil                         | 283                   | 2%                         |
| Nepal                          | 399                   | 2%                         | Philippines                    | 278                   | 2%                         |
| Philippines                    | 322                   | 1%                         | Nepal                          | 251                   | 2%                         |
| Malaysia                       | 319                   | 1%                         | Sri Lanka                      | 223                   | 1%                         |
| Sri Lanka                      | 272                   | 1%                         | Indonesia                      | 202                   | 1%                         |
| Colombia                       | 240                   | 1%                         | Russia                         | 159                   | 1%                         |
| Indonesia                      | 232                   | 1%                         | Saudi Arabia                   | 147                   | 1%                         |
| Great Britain                  | 222                   | 1%                         | Canada                         | 139                   | 1%                         |
| Taiwan                         | 208                   | 1%                         | Colombia                       | 134                   | 1%                         |
| Fiji                           | 200                   | 1%                         | Taiwan                         | 131                   | 1%                         |
| Canada                         | 193                   | 1%                         | Cambodia                       | 130                   | 1%                         |
| % Top 2                        | 10,202                | 45%                        | % Top 2                        | 7,253                 | 47%                        |
| % Top 5                        | 14,561                | 64%                        | % Top 5                        | 9,825                 | 64%                        |
| % Top 10                       | 17,517                | 77%                        | % Top 10                       | 11,811                | 76%                        |

# Spotlight on China

**ENZ in-country staff have provided some key insights and context since China reopened following the removal of its zero-COVID policy. Of key importance is that China's demand for international education following the pandemic remains strong and the Chinese government continues to be supportive of students seeking overseas study.**

|   |   |
|---|---|
|  <p><b>Initial signs are that demand for overseas study remains strong as China enters the post-pandemic phase</b></p>         | <ul style="list-style-type: none"> <li>» Concerns from earlier in the pandemic, such as contracting COVID-19, travel restrictions and the higher cost of travel have dissipated quickly, giving way to strong sentiment for overseas travel and study. Pent up demand and China's non-recognition of online study have further pushed students toward in-person offshore study.</li> <li>» The US remains the top destination for Chinese international students, but more Chinese students are turning to Asian and European countries or regions as study destinations.</li> <li>» China's vocational education is undergoing reform and there is high interest in New Zealand's vocational education. This presents opportunities for NZ's high school and tertiary education sectors as more students will look to an offshore education pathway after completing intermediate in China.</li> </ul> |
|  <p><b>China is a relationship heavy market that continues to be a critical foundation for the education sector</b></p>      | <ul style="list-style-type: none"> <li>» The state of government relationships at all levels has a significant impact on institution cooperation, access to key stakeholders, student recruitment, and student and academic mobility.</li> <li>» Frequent contact is required to make progress, from student recruitment through agents to advancing sister-city relationships with an education component.</li> <li>» New Zealand and China share a long-term close education relationship. This spans all levels of the education sector and underpins the bilateral relationship between the two countries, which celebrated its 50th anniversary in 2022.</li> </ul>  |
|  <p><b>Employment opportunities are key</b></p>  | <ul style="list-style-type: none"> <li>» More Chinese students are giving priority to the employment prospect when deciding destination and study area.</li> <li>» Chinese students' top preferences are still in the areas of STEM and business.</li> <li>» Interdisciplinary studies are becoming an emerging trend.</li> <li>» A high proportion of Chinese students are expected to return to China for employment after completing overseas study.</li> </ul>  |
|  <p><b>Safety and good value for money are key factors influencing students' decision of overseas study destination.</b></p> | <ul style="list-style-type: none"> <li>» A safe and inclusive social environment is becoming an increasingly important factor in choosing a study destination.</li> <li>» Under the pressure of the economy, cost performance of overseas study is important.</li> <li>» New Zealand has traditionally enjoyed strong perceptions of both safety and value for money in the China market. However, competitor countries have closed the gap in recent years.</li> </ul>   |
|  <p><b>Marketing and social media</b></p>  | <ul style="list-style-type: none"> <li>» Social media apps are great tools for marketing in China. Popular apps include: WeChat, Bilibili, Weibo, Little Red Book, Zhihu and Tik Tok.</li> <li>» The social media app WeChat ranks number one as the must-have tool for NZ international education promotion and marketing in China. Its powerful ecosystem offers popular functionalities which include but not limited to: official account, video account, WeChat moment ads, WeChat mini program, payment code, WeChat search and group chat.</li> <li>» ENZ China will trial more social media/digital campaigns in FY 23 and onwards, which include but not limited to: LinkedIn ENZ China page set-up, more livestreams, Study with NZ short video series.</li> </ul>  |



### A look at our updated China Insight Dashboard

China's population growth has slowed, increasing only 5% from 2011 to 2021. Over this time the student age population decreased by 17% but is forecast to remain relatively unchanged over the next ten years. UNESCO estimated over one million Chinese students studied abroad at tertiary level in 2020. The USA was China's largest market for outbound students – hosting 32% in 2020. In comparison, New Zealand hosted 1.3% and Australia 11.8%.

China continues to be New Zealand's largest source market based on student enrolments, accounting for 45% of international student enrolments in 2021. The majority of students from China come to New Zealand to attend university, with enrolments increasing from 2013 to 2019, then remaining relatively unchanged through the pandemic. The schools' sector had also been increasing prior to the pandemic, but this, and the other sectors were hit harder by the COVID-19 restrictions.

Student visa applications are trending in the right direction, with approved applications for Chinese students in Q4 2022, 184% higher than the same period in 2021. However, this increase is below that for all students which increased by 264% over this time.

When Chinese students come to New Zealand to study the majority have positive student experiences, but they tend to rate their experience lower than the average – 79% giving a rating of 6 to 10 in 2021 compared to 85% for all students.

# INSIGHT DASHBOARD: CHINA (MAINLAND)

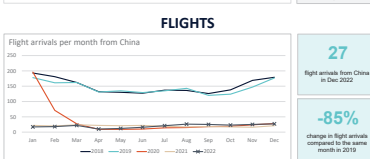
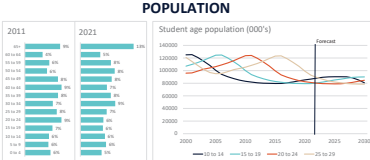
**THINK NEW** NEW ZEALAND EDUCATION

Last updated 20 February 2023

**1st** largest market for New Zealand  
21308 students enrolled with New Zealand providers in 2021

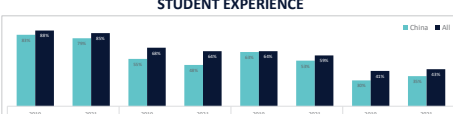
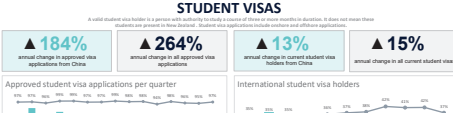
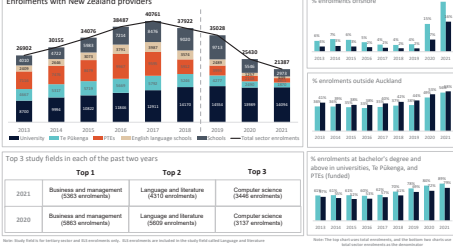
**TERTIARY STUDENT MOBILITY**  
2.20% 1.3% 12th N/A  
2.2 of every 100 tertiary students from CHINA were studying abroad in 2020  
1.3% of every 100 tertiary students from CHINA studied in New Zealand in 2020  
New Zealand is the 12th largest market for outbound tertiary students from CHINA in 2020  
New Zealand tertiary students studying abroad in CHINA in 2020

China has a moderate tertiary student mobility rate at 2.2%. In 2020 New Zealand hosted 1.3% of China's mobile tertiary students (in comparison Australia hosted 11.8%). The USA is China's largest market for outbound tertiary students - hosting 32% in 2020.



**Data sources:**  
- OECD (OECD tertiary student mobility data 2020)  
- NZ Education Providers (NZEP)  
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## ENROLMENTS



## Summary:

China had a population of 1426 million in 2021 of which 340 million were student aged (10 to 29 years), China's total population increased 5% from 2011 to 2021 but over this time the student age population decreased 17%. The student age population is forecast to remain relatively unchanged over the next 10 years.  
In 2021, general prices in New Zealand were 45% higher than in China, a slight increase since 2020, but the difference in general prices had decreased gradually since 2012 (where general prices in New Zealand were 64% higher).  
The number of flight arrivals into New Zealand from Chinese ports is much lower than pre-pandemic and may cause capacity constraints for students looking to study in New Zealand. In December 2022 there were 27 arrivals compared to 177 arrivals in December 2019.  
China plays a key role as a source market for international students, with UNESCO estimating 1.1 million Chinese students studied abroad at tertiary level in 2020, making it the world's largest outbound market. The USA hosts the largest proportion of China's outbound tertiary students. In 2020, New Zealand hosted 1.3% of China's outbound tertiary students (Australia hosted 11.8%).  
China is New Zealand's largest source market and accounted for 45% of international student enrolments in 2021. The majority of these students come to New Zealand to attend university. Chinese student enrolments at New Zealand universities increased from 2013 to 2019, and have remained relatively unchanged through the pandemic. Chinese enrolments in other sectors were hit harder by the COVID-19 restrictions. Chinese students are currently returning to New Zealand, and applying for student visas, at a lower rate than the average for all visas. Approved student visa applications for Chinese students were 184% higher in Q4 2022 compared to Q4 2021 (compared to 264% for all approved visas). Chinese student visa holders were 13% higher in Jan 2023 compared to Jan 2022 (compared to 15% higher for all student visa holders). While the majority of Chinese students have positive student experiences in New Zealand, they rate it lower than the average. They are also less positive about New Zealand's value for money.  
The NZ brand has performed well in China over recent years, with consideration and preference for NZ as a study destination steadily increasing.

## KEY STATS

- 21,308 China student enrolments with New Zealand education providers in 2021 making up 45.2% of all international student enrolments.
- 66% of enrolments from China were with universities in 2021, making this the largest sub-sector for China students.
- Student enrolments from China decreased by 15.6% from 2020 to 2021, following a 27.3% decrease from 2019 to 2020.
- 79% of China students rated their overall experience in New Zealand positively (6-10 rating) in 2021.
- 53% of China students rated New Zealand's value for money as good, very good or excellent in 2021.
- Flight arrivals from China were 85% lower in December 2022 compared to December 2019.

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**Education Manapou ki te Ao is in the process of updating our top source country 'Insight dashboards'. These one-page dashboards provide the sector with data, and commentary, to help understand the current state of our key source countries.<sup>2</sup> Data is presented on student age population, student mobility, student enrolment by sector, brand health, student experience, value for money and more. Where possible, data is presented over time and compared to the average for all markets.**

**These dashboards will be released individually on Intellilab over the coming months.**



<sup>2</sup> We define our key source countries based on enrolment counts.

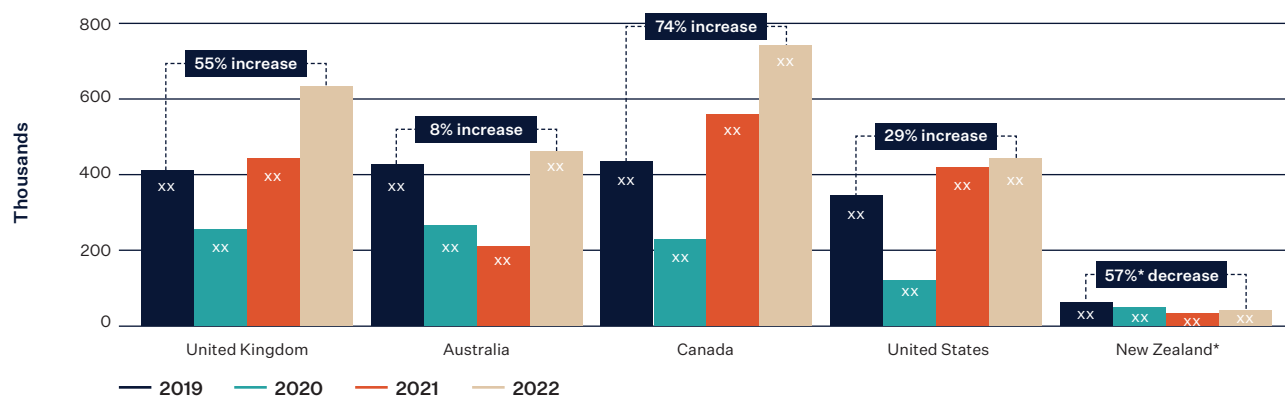
# New Zealand's competitor English-speaking international education destinations have experienced growth in 2022

**English-speaking international education competitor destinations continue to experience strong recovery in the number of visas granted,<sup>3</sup> with the number of visas granted in 2022 higher than the previous year and pre-pandemic in 2019. All these countries granted the highest number of visas to students from India in 2022.**

Canada has experienced the largest increase in student visas, with study permits processed up 74% in 2022 compared to 2019. Study permits from Indian students accounted for around half (49%) of these permits in 2022, compared to 41% in 2019. Over this time study permits processed for Indian students increased by 109% (n≈ 190,000). Canada has also experienced large growth over this time for Filipino students (up ≈ 26,500 (315%)), Nigerian students (up ≈ 19,500 (108%)), and Colombian students (up ≈ 8,500 (182%)).

The UK has experienced the second highest increase in visas, up 55% from 2019 to 2022. In 2022, the highest number of visas issued were to Indian students, followed by Nigerian students and Chinese students (Chinese students had the highest number of visas issued in 2019). The UK's Indian and Nigerian market has grown considerably since 2019 (up ≈ 135,000 and 111,000 respectively) but they have also had a large increase in visas issued to students from Pakistan (up ≈ 30,500 (522%)), Bangladesh (up ≈ 19,000 (796%)), and Sri Lanka (up ≈ 10,190 (1170%)). Of the UK's top 10 nationalities issued visas in 2022, the largest decrease in visas issued were to students from China (down ≈ 55,000), and Saudi Arabia (down ≈ 14,000).

**Student visas granted<sup>3</sup> in the main English-speaking international education markets, 2019 to 2022**



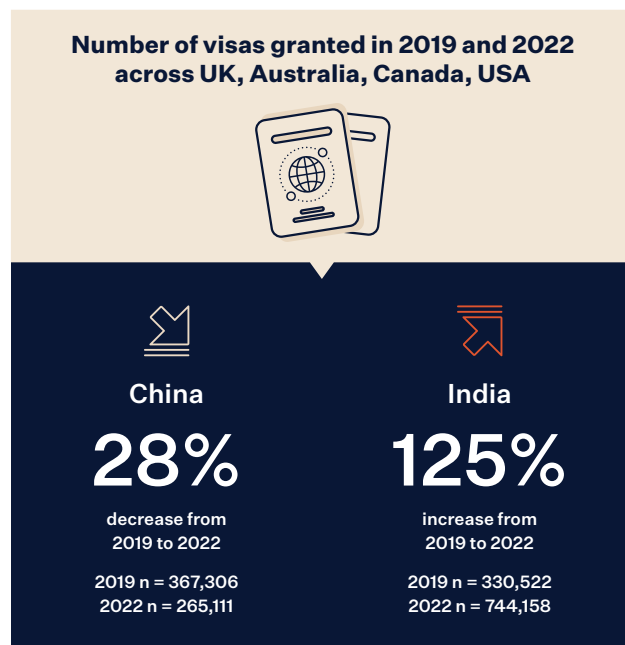
Note: Visa definitions vary across countries

\* NZ data for 2019 does not include Q1, the change from 2019 to 2022 is only based on Q2 to Q4 data in both years.

<sup>3</sup> Available visa data definitions are slightly different for each of the English-speaking countries. These are:  
**UK:** Sponsored study visas issued to both main applicants and their dependents. Accessed from: <https://www.gov.uk/government/statistical-data-sets/managed-migration-datasets>  
**Australia:** Student visas granted for primary and secondary applicants. Accessed from: <https://data.gov.au/dataset/ds-dga-324aa4f7-46bb-4d56-bc2d-772333a2317e/details>  
**Canada:** Applications for new study permits processed. Accessed from: <https://open.canada.ca/data/en/dataset/9b34e712-513f-44e9-babf-9df4f7256550>  
**USA:** F1 and F2 visas issued. Accessed from: <https://travel.state.gov/content/travel/en/legal/visa-law0/visa-statistics/nonimmigrant-visa-statistics/monthly-nonimmigrant-visa-issuances.html>  
**New Zealand:** Student visas granted for courses of 3 months or longer. Data supplied by Immigration New Zealand.

Growth in student visas issued for study in the USA from 2019 to 2022 is more modest, at 29%, compared to Canada and the UK. The increase in visas issued to Indian students has driven this growth (up ≈ 80,000 (184%)) and to lesser extent students from Bangladesh (up ≈ 8,000 (353%)). Over half of the USAs top 10 nationalities issued visas in 2022 experienced a decrease in visa numbers compared to 2019 – China, Saudi Arabia, Brazil, Viet Nam, Japan, and South Korea.

Australia opened its border to international students in December 2021, so 2022 is Australia’s first full academic year with restrictions removed since 2019. Australia’s international education sector has experienced a strong recovery – visas granted are 8% higher in 2022 than pre-pandemic in 2019. Unlike the other English-speaking destinations that have seen growth in visa levels driven by one or two nationalities, Australia has experienced strong growth across a range of nationalities including Nepal, India, Thailand, Colombia, Philippines, Pakistan, Indonesia, and Viet Nam.



**Top 10 nationalities^ granted student visas\* in other English-speaking international education markets in 2022 (compared to 2019)**



UNITED KINGDOM



AUSTRALIA



CANADA



UNITED STATES

| NATIONALITY   | 2019           | 2022           | NATIONALITY  | 2019           | 2022           | NATIONALITY  | 2019           | 2022           | NATIONALITY  | 2019           | 2022           |
|---------------|----------------|----------------|--------------|----------------|----------------|--------------|----------------|----------------|--------------|----------------|----------------|
| India         | 43,562         | 178,624        | India        | 68,664         | 77,338         | India        | 174,638        | 364,380        | India        | 43,658         | 123,816        |
| Nigeria       | 9,260          | 119,997        | China        | 87,267         | 74,728         | Nigeria      | 18,225         | 37,833         | China        | 87,050         | 58,645         |
| China         | 158,317        | 103,637        | Nepal        | 29,898         | 43,921         | Philippines  | 8,399          | 34,832         | South Korea  | 20,151         | 19,207         |
| Pakistan      | 5,854          | 36,429         | Colombia     | 16,695         | 23,393         | China        | 34,672         | 28,101         | Viet Nam     | 15,946         | 13,473         |
| Bangladesh    | 2,434          | 21,799         | Brazil       | 19,834         | 19,192         | Iran         | 14,297         | 16,715         | Japan        | 13,145         | 11,031         |
| United States | 15,505         | 15,517         | Thailand     | 10,289         | 18,512         | Colombia     | 4,625          | 13,051         | Brazil       | 13,618         | 10,258         |
| Sri Lanka     | 871            | 11,061         | Philippines  | 12,788         | 17,286         | Algeria      | 10,939         | 12,103         | Bangladesh   | 2,205          | 9,981          |
| Saudi Arabia  | 22,921         | 8,865          | Viet Nam     | 12,933         | 15,330         | France       | 11,410         | 12,099         | Nigeria      | 4,564          | 8,928          |
| Hong Kong     | 9,416          | 7,974          | Indonesia    | 9,573          | 13,276         | Bangladesh   | 7,400          | 10,899         | Mexico       | 5,736          | 8,213          |
| Malaysia      | 7,573          | 7,231          | Pakistan     | 8,243          | 12,290         | Brazil       | 8,293          | 9,801          | Saudi Arabia | 12,871         | 7,247          |
| Other         | 128,697        | 115,417        | Other        | 144,584        | 138,418        | Other        | 61,654         | 42,289         | Other        | 118,570        | 164,028        |
| <b>Total</b>  | <b>404,410</b> | <b>626,551</b> | <b>Total</b> | <b>420,768</b> | <b>453,684</b> | <b>Total</b> | <b>423,835</b> | <b>739,283</b> | <b>Total</b> | <b>337,514</b> | <b>434,827</b> |
| %Top1         |                | 29%            | %Top1        |                | 17%            | %Top1        |                | 49%            | %Top1        |                | 28%            |
| %Top2         |                | 48%            | %Top2        |                | 34%            | %Top2        |                | 54%            | %Top2        |                | 42%            |
| %Top5         |                | 73%            | %Top5        |                | 53%            | %Top5        |                | 65%            | %Top5        |                | 52%            |

^ Top 10 nationalities in 2022

\* Visa definitions vary across countries

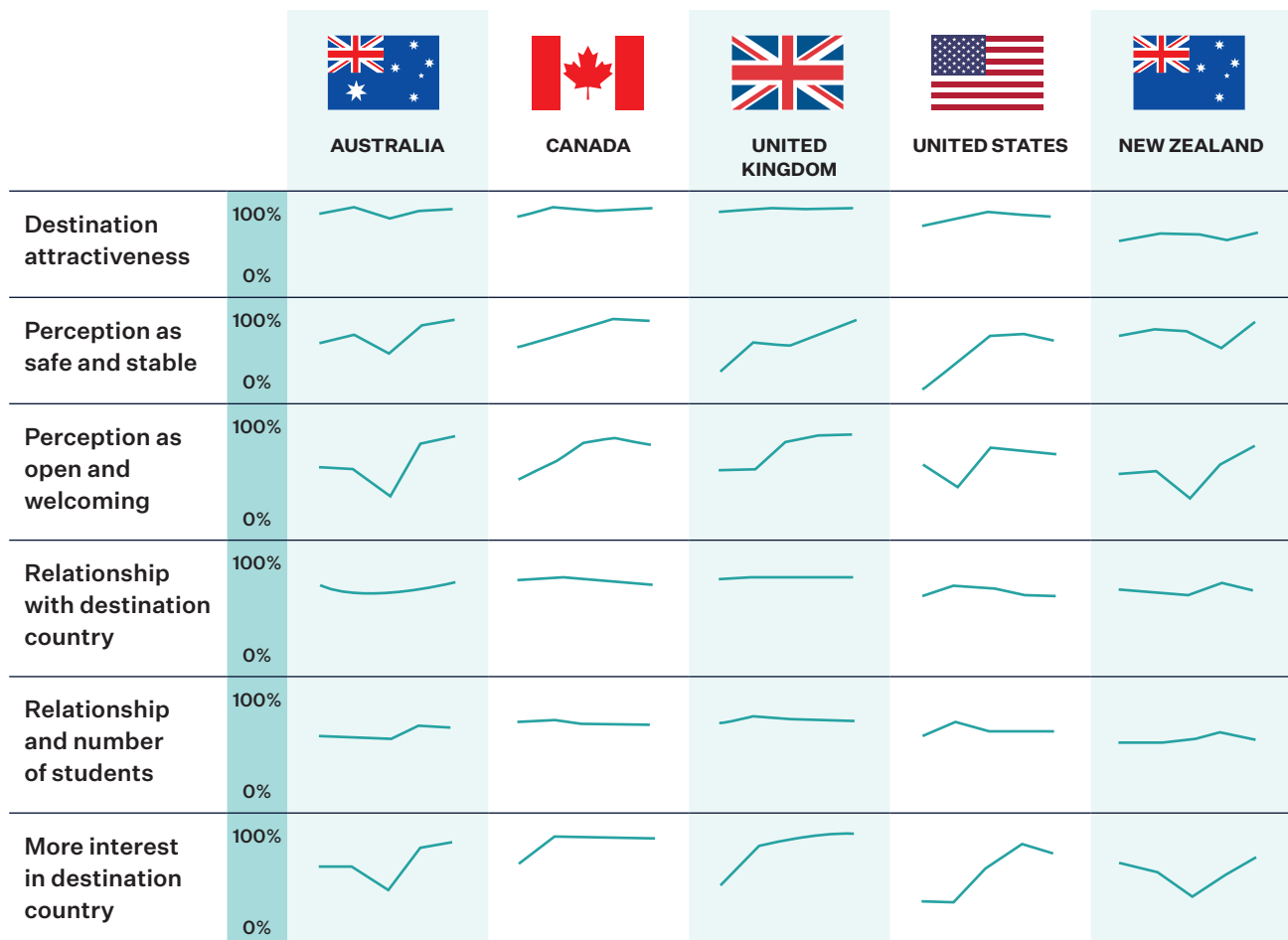
# Agents think that New Zealand's attractiveness has improved

**New Zealand improved its position across almost all measures in the October 2022 Navitas Agent perception Survey. Agents perceive New Zealand as less attractive than other English-speaking destinations, but New Zealand's attractiveness has increased, and is perceived as both more 'open and welcoming' and 'safe and stable'.**

The most recent Navitas Agent survey in October 2022<sup>4</sup> of over 800 agents in 70 countries found that 59% of agents reported more interest in New Zealand as a destination, a significant increase from just 20% a year prior. New Zealand's reputation as open and welcoming has also increased substantially, with 80% of agents (from a low of 20% a year earlier) agreeing that New Zealand's reputation as open and welcoming for international students has improved over the past two months.

New Zealand has also seen recent improvements in its reputation as safe and welcoming for international students. Despite these improvements, at 80% New Zealand has lost its market advantage as being perceived as safe and stable – with a decline during COVID – and is now trailing Australia (88%), Canada (84%) and the UK (84%).

Agents' perception of English-speaking destinations on a range of measures, July 2020 to October 2022



<sup>4</sup> The October 2022 survey results were provided to ENZ by Navitas. Some survey results are publicly available here: <https://insights.navitas.com/>





# Studying with New Zealand

**When studying with Aotearoa New Zealand we want international students to receive an excellent education and student experience – *Te hora hiranga mātauranga me nga wheako taura.***

This will be achieved by providing high-quality and diverse education experiences and making sure international students feel welcome, safe, and well while they are in New Zealand. To understand how New Zealand's international education sector is delivering to its international students this chapter focusses on data and research related to international student enrolments, their student experience, transitions to further study, education outcomes, and the diversification of education products and services.



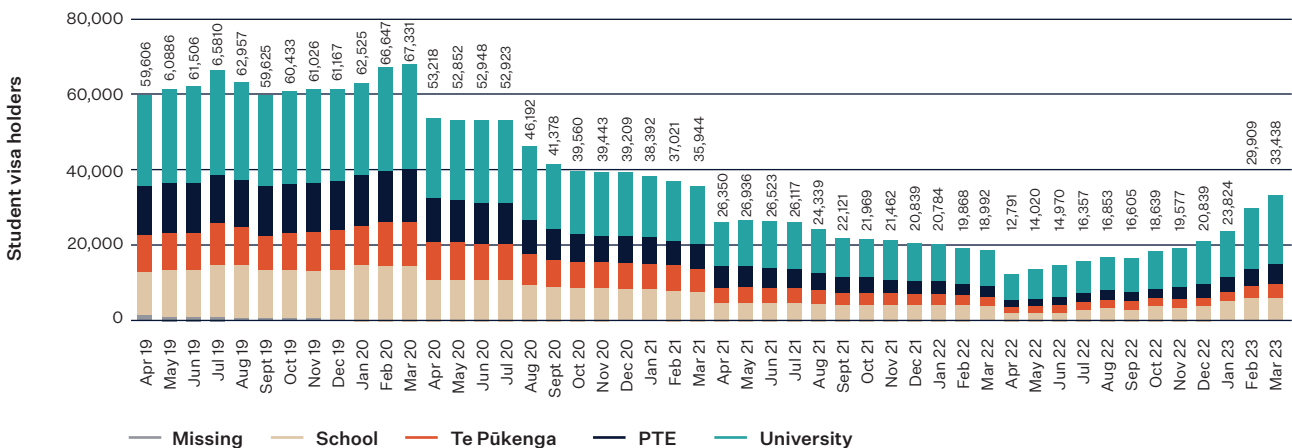
# The number of international student visa holders has nearly doubled since borders reopened in August 2022

**Valid international student visa holders continue to increase. At the beginning of March 2023 there were nearly 34,000 international student visa holders, an increase of 98% since borders reopened at the start of August 2022.**

All sectors have experienced an increase in student visa holders since August 2022. Visas for study at universities and PTEs had a higher-than-average increase (109% and 112% respectively compared to 98% overall), visas for study at schools increased 77% and Te Pūkenga increased 71%.

The top 4 student visa holder nationalities at the start of March 2023 were Chinese, Indian, South Korea and Japanese. These were also New Zealand's top 4 visa holder nationalities pre-pandemic in March 2020. Visa holders from India are currently making up a much smaller proportion of international student visa holders, 10% in March 2023 compared to 19% in March 2020.

**International student visa holders by sector, April 2019 to March 2023**



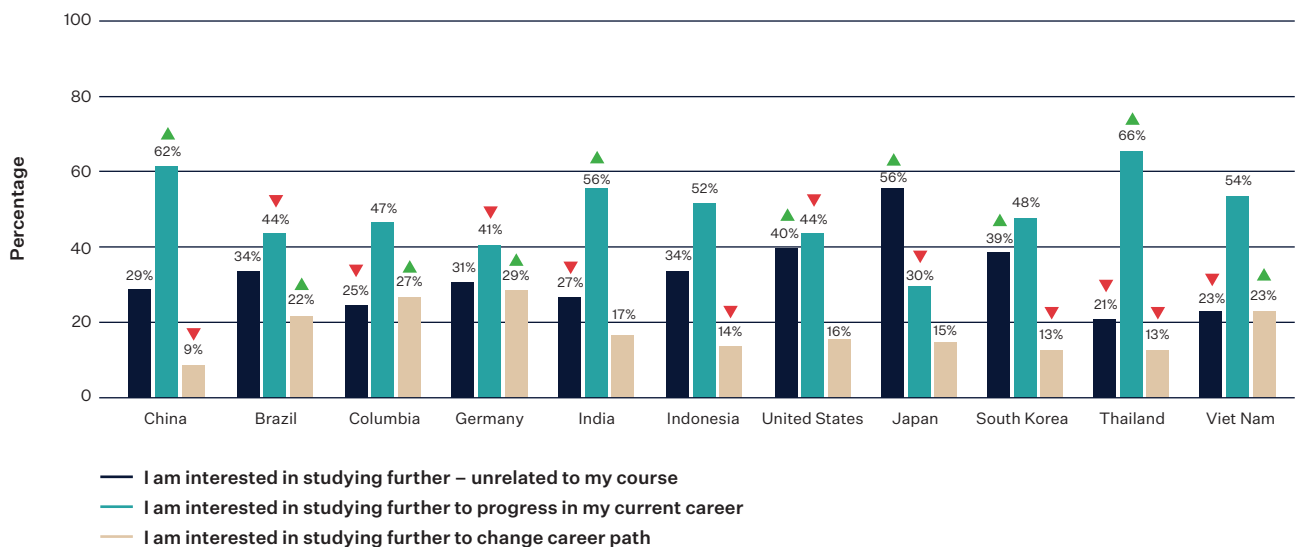
# International older professionals are more focussed on learning that will help their career success

**Nearly half of international older professionals (aged 35-55) who are interested in further study said they would prefer to study in their home country. Their reason for studying was also clear with a little over half interested in studying further to progress in their current career.**

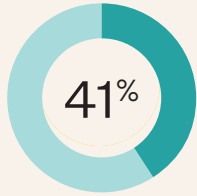
In October 2022, ENZ surveyed more than 4,500 working professionals (aged 35-55) across 11 of New Zealand’s priority markets to understand their level of interest in studying overseas and the appeal of Aotearoa New Zealand as a provider of online and virtual education products. Where possible results from working professionals are also compared to those from students that were reported through ENZs annual brand tracker.<sup>5</sup>

The level of interest in studying overseas is predictably lower for international older professionals than students (31% compared to 54%). Older professionals interested in further study are more likely to want to study in their home country (49%). Of different ways to study in their home country the most interest was through online study courses by overseas institutions, followed by studying at local institutions.

## Purpose of further education by priority market



<sup>5</sup> ENZs annual brand tracker surveys around 4,000 considering students (16-25 year olds who are interested in studying overseas) across 11 of New Zealand’s priority markets.



of older professionals interested in further study said they are interested in online study courses provided by overseas institutions in future.

Half (51%) of older professionals surveyed noted that they were interested in studying further to progress in their current career and a further 17% noted that they were interested in studying further to change career path. This held true across all markets except Japan, where older professionals were more likely to indicate they were interested in further study that is unrelated to their current career.

New Zealand's overall brand ranking of 5th (behind the USA, Australia, UK and Canada) with older professionals is consistent with students, although the absolute levels of awareness, consideration and preference are higher among older professionals. The educational interests of older professionals are different, however, in that the majority are focused on learning that will help their career **success**.

**ENZ has recently launched the Study with New Zealand Online pilot learning platform for adult professionals. The platform is New Zealand owned and branded and offers global learners a new way to engage with a New Zealand education.**

The pilot platform was developed in response to findings from the older professionals research that there is a significant career-oriented adult learner market looking for ways to advance their current career. Study with New Zealand Online aims to tap into that market and test if there is value in what New Zealand can offer.

Study with New Zealand Online has up to 60 courses available from over 20 education providers.

This project, part of the Strategic Recovery Plan for International Education launched in 2020, is about exploring new and different ways to deliver, and new and different audiences for, the New Zealand education experience.



**DIG DEEPER**

The *Understanding NZ's Brand Health and Future Trends Among Older Professionals* report is available [here](#)

# Fifty-four countries make up 80% of international student enrolments worldwide

**A recent report found that most international students are recruited from just a handful of countries with many institutions overly reliant on too few source countries for international students.**

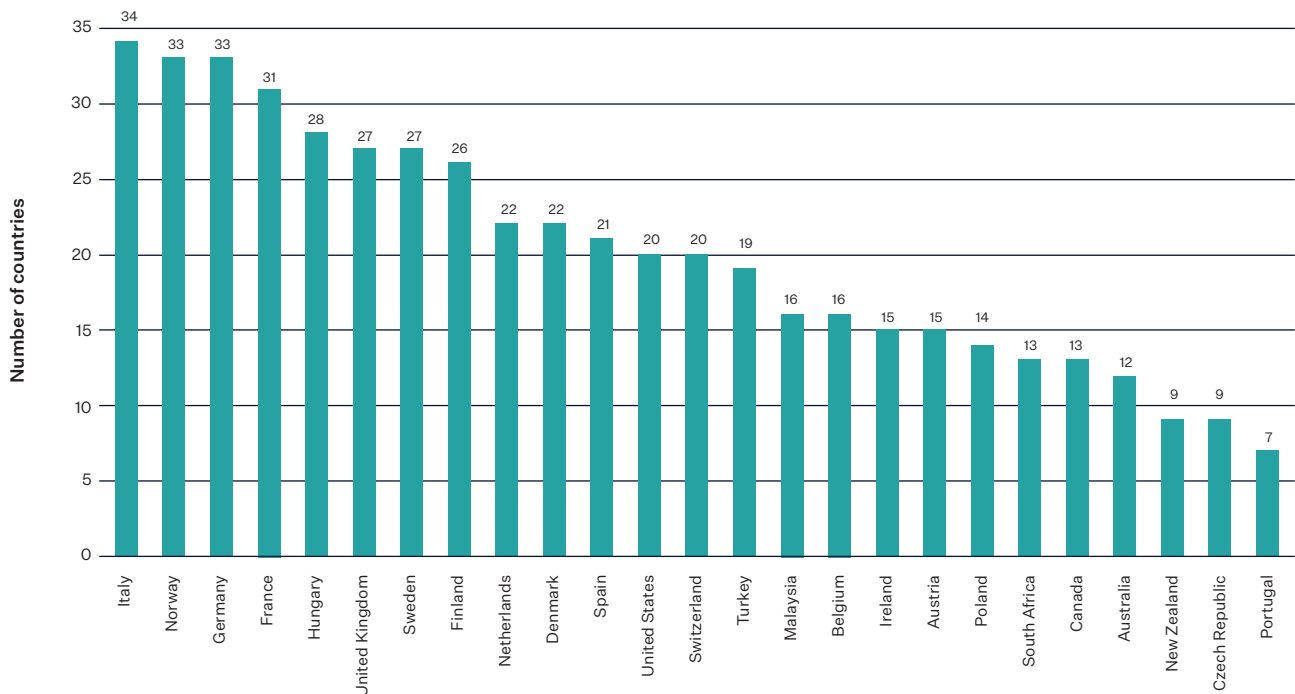
Study Portals used estimates from UNESCO and OECD to examine the source markets for international student enrolments and present a picture of student mobility based on past enrolments.<sup>6</sup> They found that 14 countries make up half of all international student enrolments and only 54 countries (of over 200) make up 80% of international student enrolments worldwide.

Of 25 study destinations examined, they noted that western European countries were most diversified.

They also found that New Zealand, alongside Australia and Canada, were some of the least diversified being overly reliant on just a handful of origin countries for its students.

Looking to the future, the report notes many of the origin countries with rising student interest share a common profile: young and mobile populations, and an appetite for high-quality higher education not yet matched by local institutions.

**The number of origin countries that contribute to 80% of past student enrolment by study destination**



<sup>6</sup> Study Portals (2022) Diversify with Data: Insights for Higher Ed Institutions <https://studyportals.com/report/benchmarking-geographic-diversification/>



# International education benefits and connections

**International education can provide economic, social and cultural benefits for all New Zealand.**

We want New Zealanders to understand and embrace the opportunities that arise from international education, and leverage them to strengthen global connections and benefits to New Zealand. This chapter focuses on data and research related to the longer-term and broader impacts that international education has for New Zealand.

# New Zealanders' perceptions of the value of international students holds strong

**International students not only bring economic benefits to New Zealand communities they also bring social and cultural values into New Zealand. In November 2022, 69% of a representative sample of 1,000 New Zealanders told ENZ that they agreed that international education benefits New Zealand.**

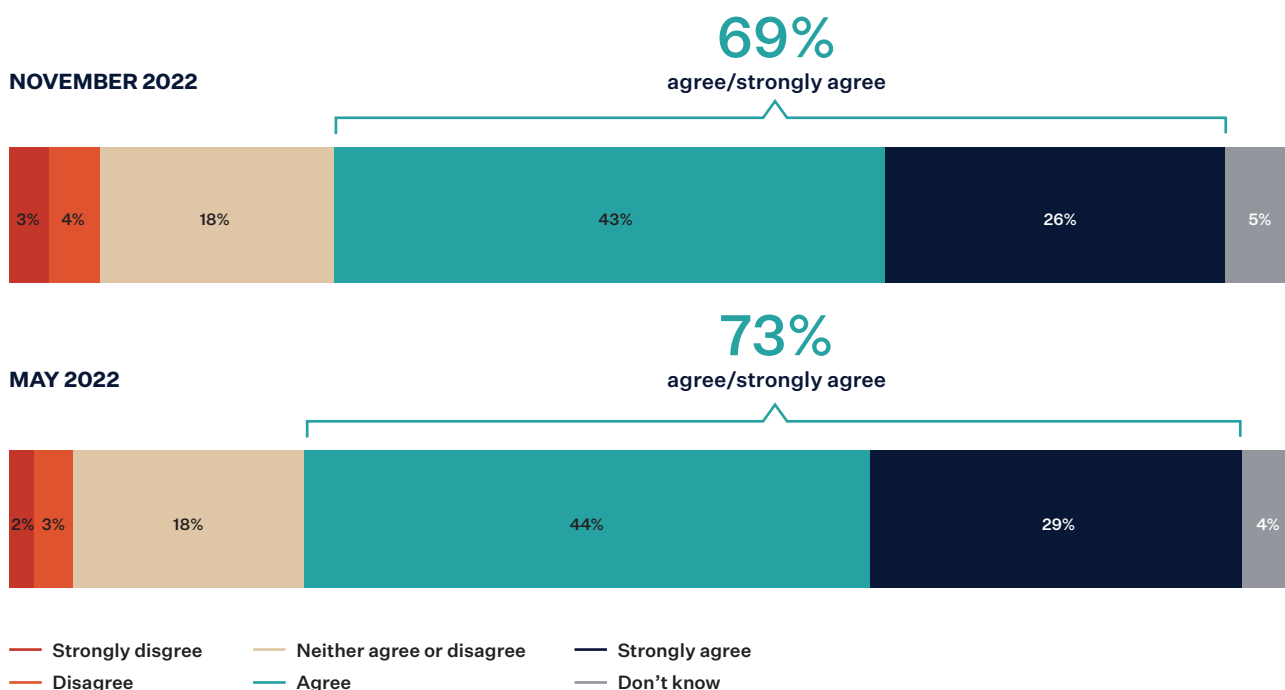
A thriving and sustainable international education sector needs the support and buy-in of New Zealanders – this is referred to as the ‘social license to operate’. Social license is defined as the ongoing acceptance of a sector’s (in this case the international education sector) practices by the public.

In November 2022, ENZ conducted an online survey of a representative sample of 1,000 adult New Zealanders. The survey helps understand the biggest issues currently facing New Zealanders, the importance of international students in relation to these issues, the overall level of support for international students and the factors influencing the level of support.

Respondents frequently noted the increasing cost of living (76%), followed by the health and well-being of New Zealanders (72%), and the lack of affordable housing (56%) as the issues most important to them. Issues related to international education were ranked much lower, but the proportion of respondents noting them as important has increased between the last two surveys.

Over two-thirds (69%) of New Zealanders agree that international education benefits New Zealand, in line with 73% in the previous survey. Of the benefits listed in the survey, New Zealanders were most aware that international students contribute to local businesses during their studies (81%) and to Aotearoa New Zealand’s cultural diversity (79%).

**The extent to which New Zealanders agree or disagree that international education/international students benefit New Zealand, May 2022 and November 2022**

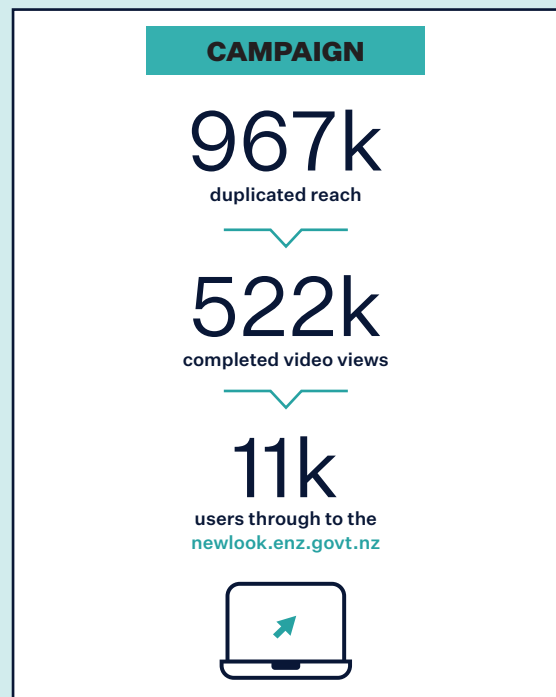




**To help improve the social license of the international education sector, ENZ ran a social license campaign in December 2022. The campaign aimed to raise awareness amongst New Zealanders of the benefits of international education.**

The campaign centred around video ads that featured inspirational stories from three international students who came to New Zealand and the benefits their work and study have had for Aotearoa New Zealand. The online videos pointed people to a dedicated website, [newlook.enz.govt.nz](http://newlook.enz.govt.nz), where people could learn more about the international students featured in the campaign and also access many other inspiring stories and videos of international students and communities in New Zealand.

The campaign included a suite of online video ads that ran across TVNZ OnDemand, Three Now, Facebook, and YouTube.



**DIG DEEPER**

The New Zealander's Perceptions of the Value of International Students survey results are available on **Tableau**



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# International education is an important contributor to New Zealand's rebuild

**ENZ recently released a report on the broader benefits of international education for New Zealand. It provides a baseline valuation of both the immediate and longer-term economic benefits of international education. The immediate benefit of international education to New Zealand was estimated to be \$3.7 billion in 2019, and \$5.9 billion in longer-term benefits in the form of labour supply and productivity to New Zealand's GDP.**

This latest valuation applied the Computable General Equilibrium (CGE) methodology to determine both the immediate and longer-term contributions. This is a more rigorous methodology than previous economic assessments, that applied an input-output methodology which only examined the immediate economic benefits.

## Immediate benefits

The report estimates that in 2019 the immediate benefit of international education to New Zealand was \$3.7 billion and around 6,000 jobs in flow-on employment. By 2022, these immediate benefits were estimated to have reduced significantly by to \$790 million. The lower immediate value in 2022 reflects the substantial decline in student volumes onshore due to the COVID pandemic.

## Longer term benefits

This valuation also explored the extent of the indirect longer-term contribution of international education to New Zealand's GDP. This is the first time that these longer-term contributions have been examined.

Determining this contribution involved estimating the GDP output and wage impacts associated with domestically trained international students who remained in New Zealand and transitioned into the domestic workforce in the 10 years leading up to each year - 73,885 and 73,080 international students in 2019 and 2022 respectively. It was found that these students contributed around \$6 billion in the form of labour supply and productivity to New Zealand's GDP in both 2019 and 2022. It also found that one in four former international students transitioned into occupations that are on the Long-Term Skill Shortage List.

**“This report confirms the tough time the sector has had over the past two years, highlights the contribution it made in the past, and tells us that it is possible to become a vibrant, sustainable and resilient sector in the future.”**

Grant McPherson, Chief Executive

## Scenarios for recovery

At the time the valuation modelling was carried out (October-December 2021), there was uncertainty about the timing of the New Zealand border reopening and the immigration policy settings that would be in place. Given this uncertainty, three scenarios were applied to the CGE modelling of the future economic impacts based on different assumptions around the timing and volume of international learner enrolments.

The scenario which had the border reopening in a similar way to what eventuated saw international learner enrolments in New Zealand increasing from 2023 onwards up to a maximum of 75% of pre-pandemic numbers by 2026. This scenario has the immediate direct economic contribution to the New Zealand economy returning to pre-pandemic levels by 2028 and the longer-term additional contribution starting to recover by 2030.



### DIG DEEPER

The full *Broader Benefits of International Education for New Zealand* report is available on [Intellilab](#)

# THE BROADER BENEFITS OF INTERNATIONAL EDUCATION TO NEW ZEALANDERS



International education is an important contributor to New Zealand's GDP.

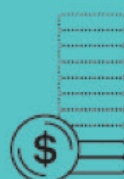


**\$3.7 billion in 2019**

direct financial contribution to GDP<sup>1</sup>

**6,000 jobs**

In flow-on employment



**\$0.8 billion in 2022**

the impact of the pandemic and the borders being closed **reduced** international education's direct immediate financial contribution to \$0.8 billion

International students living and working in New Zealand after completing their studies, contributed economic, social, cultural, and international benefits.



**\$5.9 billion in 2019** | **\$6.1 billion in 2020**

In labour supply and productivity to New Zealand's GDP<sup>2</sup>



**73,885**

International students remained in New Zealand and transitioned into the domestic workforce in the previous 10 years



**78%**

of international students with post-degree and honours qualifications remain in New Zealand after the first year post-study



**23%**

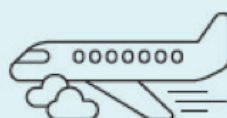
of international students transitioned into occupations in long term skill shortage areas



**11%**

of international students volunteer in their communities during study

Most international students return home after they have completed their studies.



**62%**

return to their country of origin after they have completed their studies

**75%**

have returned home after three years

International education can enable global competence.

More broadly, there is evidence that international education can enable domestic students to develop global competence within a structured teaching environment, and contributes to soft power in diplomacy, trade, and perceptions of New Zealand through a range of mechanisms, although these impacts were not directly quantifiable. Broader impacts for Māori are potentially also present across each area of impact from international education.

- 1 The direct financial contribution was calculated using the Computable General Equilibrium (CGE) methodology. This methodology is more rigorous than previous analyses that used an Input Output methodology and calculated a direct financial contribution of \$5.0 billion.
- 2 Determining this contribution involved using NZ Statistics Department IDI data and EY CGE modelling to estimate the GDP output and wage impacts associated with domestically trained international students who remained in New Zealand and transitioned into the domestic workforce in the 10 years leading up to each year.

## Sources used for this report

- » Google analytics data for the studywithnewzealand.govt.nz website
- » Immigration New Zealand student visa data as at 2 March 2023
- » Insight dashboard for China. ENZ. March 2023. This can be downloaded from: [need url link](#)
- » Competitor country visa data:
  - UK:** Accessed on 8 March 2023 from <https://www.gov.uk/government/statistical-data-sets/managed-migration-datasets>
  - Australia:** Accessed on 8 March 2023 from <https://data.gov.au/dataset/ds-dga-324aa4f7-46bb-4d56-bc2d-772333a2317e/details>
  - Canada:** Accessed on 8 March 2023 from <https://open.canada.ca/data/en/dataset/9b34e712-513f-44e9-babf-9df4f7256550>
  - USA:** Accessed on 8 March 2023 from <https://travel.state.gov/content/travel/en/legal/visa-law0/visa-statistics/nonimmigrant-visa-statistics/monthly-nonimmigrant-visa-issuances.html>
- » Navitas Agent Survey October 2022. Some survey results are publicly available here: <https://insights.navitas.com/>
- » Understanding New Zealand's brand health and future trends among older professionals. This can be downloaded from: <https://newproductsservices.enz.govt.nz/category/new-products-and-services/new-products-and-services-resources/>
- » <https://studyportals.com/report/benchmarking-geographic-diversification/>
- » ENZ International student enrolment data dashboards. These are available through Tableau here: <https://prod-apsoutheast-a.online.tableau.com/#/site/educationnewzealand/views/OnshoreEnrolments2021/EnrolmentSummary>
- » New Zealanders' perceptions of the value of international students. Survey findings available on tableau here: <https://prod-apsoutheast-a.online.tableau.com/#/site/educationnewzealand/views/PerceptionsofInternationalEducationSocialLicence/Demographics?:iid=1>
- » Broader benefits of international education for New Zealand. April 2023. This can be downloaded from: [need url link](#)

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**Disclaimer:** This report provides you with information that is true and accurate to the best of Education New Zealand's knowledge, as of 17 March 2023.

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