

**key conclusions
and implications**

**future research
and development
recommendations**



The results of the 2007 National Survey provide the Ministry of Education with a comprehensive source of information about the experiences of international students studying in New Zealand. This section provides a synopsis of the research's key findings, conclusions and implications. For ease of presentation this section is separated out into the eight sub-sections of the questionnaire itself.

RESPONDENT PROFILE

Overall, it was concluded that a well-balanced and robust sample of international students participated in the National Survey in 2007. Small anomalies did exist in the final sample distribution, with private language school students being slightly under-represented and university students slightly over-represented in the 2007 research. The sample's distribution across educational sectors was strongly correlated to the enrolment patterns of international students in New Zealand.

The sample included 1,136 university students (42%), 415 ITP students (16%), 659 PTE / ELS (25%) and 467 (17%) secondary school students. Of these, 1,365 were males (51%) and 1,306 females (49%). The mean age of respondents was 22.9 years in 2007, in contrast to a mean age of 19.4 years in 2003. The majority of students resided in the North Island (75%) and had been in New Zealand for more than a year (53%).

In accordance with New Zealand international student enrolment trends, students from China (42%) were the largest national group of respondents, followed by students from Korea (11%) and Japan (7%). The remaining students originated from a range of different countries. In total over 80 different nationalities were represented. The overwhelming majority (91%) of the international students surveyed were Foreign Fee Paying students.

Thirty-five percent of international students surveyed had family members in New Zealand. Overall, only 23% of the students surveyed had been in New Zealand for 12 months or less. The vast majority of students had been in New Zealand for at least a year.

Ninety-four percent of international students surveyed had taken the International English Language Testing System (IELTS), with the median score for students being 6. In respect to students' self-assessment of their English language ability, the majority of students reported that their English reading (52%) and writing (50%) abilities were average while listening and speaking abilities were average to good.

Various financial sources were relied upon to support students' education in New Zealand. However, most students (72%) were supported by their parents. Twenty-three percent of students found payment for their education in New Zealand very difficult or extremely difficult.

The following sub-sections summarise the research findings. The findings are presented in line with the eight areas of inquiry in the survey instrument. Each section begins with a summary table of the key findings and development opportunities, followed by a more in-depth description of the general trends arising from the analysis.

MAKING A CHOICE ABOUT WHERE TO STUDY

Key Finding	Development Opportunities
<ul style="list-style-type: none"> 64% of students identified New Zealand as their first choice of study destination 	<ul style="list-style-type: none"> In AEI's 2006 International Student Survey, Australia was the country of first preference for 84% of international students studying at Australian universities
<ul style="list-style-type: none"> Those who did not choose New Zealand as first choice would prefer Australia, US or UK 	<ul style="list-style-type: none"> Scholarships, agents' recommendations and advertisements for study were not strong influencers of student choice
<ul style="list-style-type: none"> Choice was influenced by safety, quality and recognition of New Zealand qualifications and cost 	
<ul style="list-style-type: none"> Students' own preference generally took precedence over family preferences 	
<ul style="list-style-type: none"> Travel and adventure, beautiful scenery and New Zealand lifestyle were significantly more important to ESANA students than to Asian students 	
<ul style="list-style-type: none"> Sector level differences reveal that the 2007 tertiary students placed significantly more importance on agents', friends' and teachers' recommendations; tertiary students also viewed scholarships and financial support from employers or government as significantly more important in 2007 than in 2003. The quality of New Zealand education was also viewed as significantly more important in 2007 than in 2003. 	

The research results found that 64% of the students made New Zealand their first choice of study destination. While this result is positive for New Zealand education providers, it does highlight that the New Zealand education sector as a whole still needs to work hard to attract international students to our shores. Similar to the results found in 2003, the 2007 research highlights that New Zealand education providers and governing bodies need to do more to make New Zealand internationally competitive. We need to understand not only who our key competitors are but also how they are marketing and enticing international students to study in their countries, and what are the key drivers of choice for our different target markets (nationalities vs sector).

Those students who selected New Zealand as their first choice as a place of study were also more likely to recommend New Zealand as a place to study for family and / or friends. Moreover, the students who selected New Zealand as their first choice as a place of study viewed the quality of the services and facilities at their institutions higher than those students who did not, and overall these students were more satisfied with the progress they were making in their studies and more satisfied with their life in New Zealand.

LIVING ARRANGEMENTS IN NEW ZEALAND

Key Finding	Development Opportunities
<ul style="list-style-type: none"> 44% of students were either very satisfied or extremely satisfied with their accommodation arrangements 	<ul style="list-style-type: none"> The least satisfying aspects of accommodation were lack of value for money, poor internet access and support provided
<ul style="list-style-type: none"> Most students paid between \$100 and \$300 per week in living expenses; 5% of students reported they paid more than \$500 per week in living expenses 	<ul style="list-style-type: none"> Chinese students were the least satisfied with their accommodation
<ul style="list-style-type: none"> 80% of students spend less than 5 hours per week doing housework 	<ul style="list-style-type: none"> The key sources of dissatisfaction were: location, heating and size of accommodation; rules and regulations and quality of food provided
<ul style="list-style-type: none"> Homestay students were more satisfied with aspects of their living arrangements than students in other accommodation types 	<ul style="list-style-type: none"> Students who shared the home with other international students were generally less satisfied with living arrangements than students who lived with no other international students
<ul style="list-style-type: none"> 66% of students in homestays were very satisfied or extremely satisfied with their accommodation; only 2% were not at all satisfied 	
<ul style="list-style-type: none"> Students from South America were the most satisfied with their accommodation relative to other students 	

International students in New Zealand most frequently resided in rental accommodation (57%) and homestays (22%), with smaller numbers in hostels (9%), their own home or relatives' homes (10%). Just under half (44%) of the students reported that they were very or extremely satisfied with their accommodation arrangements. Consistent with the results found in 2003, those in homestays were more satisfied with their accommodation than those in rental property or in student hostels.

The vast majority of international students (69%) paid between \$101 and \$300 per week for living expenses. The majority of international students were moderately satisfied with all aspects of their accommodation. The aspects students appeared least satisfied with were value for money, access to internet and support / assistance provided.

In relation to the homestay experience, the 2007 research found that 54% of international students lived in New Zealand homes where there were no other international students. Seventy-three percent of students outlined that they interact no more than 10 hours per week with family members, and 13% claimed the interaction is less than one hour per week.

EDUCATIONAL EXPERIENCES IN NEW ZEALAND

Key Finding	Development Opportunities
<ul style="list-style-type: none"> The least challenging activities were understanding teachers, taking notes in class and completing assignments on time 	<ul style="list-style-type: none"> The least challenging activities were understanding teachers, taking notes in class and completing assignments on time
<ul style="list-style-type: none"> Only 28% of students were not satisfied with the progress they are making with their studies 	<ul style="list-style-type: none"> Only 33% of students believed that there are opportunities for other students to learn about their culture in class
<ul style="list-style-type: none"> Secondary school and PTE / ELS students in 2007 were significantly more satisfied with the progress they were making in their studies than their 2003 counterparts. 	<ul style="list-style-type: none"> Relative to other elements of cultural inclusiveness, students did not believe as strongly that teachers understood the problems of international students or that the teachers made special effort to help international students
<ul style="list-style-type: none"> Family interest in performance is high 	<ul style="list-style-type: none"> Perceptions of cultural inclusiveness were less positive in 2007 than in 2003, with 59% of 2003 respondents agreeing they 'feel included, in their class; this had declined to 47% for 2007 respondents
<ul style="list-style-type: none"> The most challenging academic activities were making oral presentations, taking exams and writing assignments 	
<ul style="list-style-type: none"> A high percentage of students (79%) felt that the amount of work and speed of teaching was about right; 7% responded that teaching was too slow 	
<ul style="list-style-type: none"> More PTE and ELS respondents assessed the course content and quality of instructors as excellent than students in any other group 	
<ul style="list-style-type: none"> Students in 2007 were generally more satisfied with the progress they are making in their studies than those in the 2003 survey 	

The majority of students described their academic progress as good (49%) or average (35%). Only 3% indicated that their progress was poor. Similar to 2003, family interest in student progress was high, with 68% of the students indicating that doing well academically was very important or extremely important to their families. This expectation was consistently held across all sector groups.

University students and private language students reported better progress than secondary or ITP students. Consistent with 2003, international students did not find routine academic tasks difficult. Making oral presentations and taking exams were seen as the most challenging, but these were rated as only slightly difficult. Secondary students found academic activities more demanding than tertiary or private language students.

Students evaluated their programme of studies (course content, feedback, quality of instructors and assessment procedures) in the average to good range. Tertiary students gave more favourable evaluations than secondary or language school students. Similar to 2003, overall Chinese students reported the least difficulty, followed by ESANA students. The students with the greatest level of difficulty were Middle East / African students, Other Asian students and Pacific Island students.

Similar to 2003, overall students report a moderate to good amount of cultural inclusiveness in their educational environments. However, the 2007 results are not as positive in a number of areas. In 2003 59% of students agreed that they 'feel included' in their class. This has declined to 47% in the 2007 survey. Furthermore, in 2003, 55% believed that students from different cultural groups work well with each other and in 2007 only 46% perceived this to be true. Again fewer students in 2007 (33%) believed that there are opportunities for other students to learn about their culture in class, suggesting that New Zealand educators may not be doing enough to internationalise their curricula.

SERVICES & FACILITIES

Key Finding	Development Opportunities
<ul style="list-style-type: none"> 53% of students used agents to assist with arrangements to study in New Zealand (61% in 2003) and found them to be particularly good at choosing a place to study, translating and making travel arrangements 	<ul style="list-style-type: none"> Only 31% of students who used an agent were very satisfied or extremely satisfied with their services
<ul style="list-style-type: none"> Evaluations of services and facilities provided by education institutions were good. Students rated the quality of library services, computing services, international student office, learning support, orientation services and recreational facilities highly 	<ul style="list-style-type: none"> Students knew the least about and were least satisfied with financial advisory services and 'buddy' programmes offered by institutions
<ul style="list-style-type: none"> 41% of students felt that New Zealand represented good value for money as an overseas study destination (up from 36% in 2003) and 53% were likely to recommend New Zealand as a study destination (up from 44% in 2003) 	<ul style="list-style-type: none"> Chinese students gave the least favourable response to the value for money question
<ul style="list-style-type: none"> PTE and ELS students gave the highest evaluation of New Zealand as good value for money 	
<ul style="list-style-type: none"> ITP students were more satisfied than university students with their agent experience, but university students tended to give more favourable evaluations of the services provided by their institution 	

On the whole, mean evaluations of specific services and facilities were good. In particular, students evaluated the quality of library services, computing services, learning support services, international student office, counselling services, student orientation services, and sports and recreational facilities better than in 2003.

In 2007 students appeared relatively more informed about the actual availability of services than students in 2003. In some cases, up to 40% of students were unable to say if their institution provided a particular service in 2003; however, this declined to only 23% in 2007. The key services students had difficulty with were financial advice services, language laboratories and buddy or mentor programmes.

Students who had been living in New Zealand for longer were more likely to perceive New Zealand education as good value for money and were also more likely to recommend New Zealand as a place to study for family and / or friends. Students who perceived New Zealand education as good value for money were students who did not have a high level of financial difficulty in paying for their education in New Zealand.

SUPPORT OR HELP THAT YOU MIGHT RECEIVE IN NEW ZEALAND

Key Finding	Development Opportunities
<ul style="list-style-type: none"> Students in 2007 generally were more satisfied with the support they received than in 2003 	<ul style="list-style-type: none"> Very little support is perceived to be available through clubs or community organisations
<ul style="list-style-type: none"> Students are more likely to seek social and emotional support from their international peers than any other group 	<ul style="list-style-type: none"> Secondary school students were significantly more satisfied than tertiary students with the support they received. In particular, tertiary students in 2007 were found to be significantly less satisfied with the overall support they received than tertiary students in 2003.
<ul style="list-style-type: none"> Staff in educational institutions are most likely to be sought to assist with practical problems or language issues 	
<ul style="list-style-type: none"> New Zealand students are a good source of support for information needs such as assisting students to find their way around 	

The 2007 results outlining students' perceptions on the availability and sources of social support to assist with both practical and emotional needs produced very similar results to those found in 2003. Students appeared to rely on support sources from both New Zealand and their home countries. People from students' home countries were particularly important for providing emotional support.

Staff in educational institutions, homestay families and New Zealand friends were seen as most widely available to assist with practical problems. Members of the wider community, however, were rarely seen as available to render support. On the whole students in 2007 were more satisfied with the support received than those in 2003.

YOUR RELATIONSHIPS WITH PEOPLE IN NEW ZEALAND

Key Finding	Development Opportunities
<ul style="list-style-type: none"> 61% of international students would like to have more New Zealand friends 	<ul style="list-style-type: none"> 29% believed that New Zealand students do not seem interested in having international friends
<ul style="list-style-type: none"> 34% of respondents reported that making New Zealand friends was difficult but only 42% felt they had tried their best to make friends 	<ul style="list-style-type: none"> 16% of students never spent any social time with New Zealanders and 23% said they never study with New Zealand students
<ul style="list-style-type: none"> Secondary school students socialised more often with other international students compared to tertiary students or PTE / ELS students 	<ul style="list-style-type: none"> Only 25% of international students reported that they had never experienced any discrimination from New Zealand students
<ul style="list-style-type: none"> Chinese students have significantly different perceptions of relationships from students from Other Asian countries 	

The 2007 results show similar trends to 2003, with 34% of international students stating that they believe that making New Zealand friends is difficult. Furthermore, 61% would like to have more local friends. Language proficiency appeared to be a barrier for 23% of international students in 2007; however, it is worthwhile noting that this was 12% lower than reported in 2003. Furthermore, only 42% of the students agreed that they themselves tried their best to make New Zealand friends. This result perhaps indicated that international students tend to place the pursuit of friendship with New Zealanders as too difficult.

The 2007 results were consistent with the 2003 survey in that Chinese students differed from other international students on all friendship items. They were less likely to want more New Zealand friends (only 47%); try their best to make New Zealand friends (35%); and see making New Zealand friends as difficult (28%). In contrast, 77% of Korean, 80% of Japanese, 69% of Vietnamese and 79% of Malaysian students desired to have more New Zealand friends. Furthermore, Vietnamese (62%) and Malaysian (55%) students were also more likely to try their best to make New Zealand friends, contrary to their Korean and Japanese counterparts who exhibited similar levels of effort as the Chinese.

It was somewhat concerning to report that only a quarter of the international students reported that they had never experienced discrimination from New Zealand students. It was more encouraging to see that greater proportions of students had never experienced discrimination from teachers (45%), administrative or support staff at their institutions (47%), or from other international students (48%).

LIFE IN NEW ZEALAND

Key Finding	Development Opportunities
<ul style="list-style-type: none"> Only 28% of students disagreed with the statement 'I am satisfied with my life in New Zealand'; this is an improvement over the 2003 findings 	<ul style="list-style-type: none"> Chinese students were the least satisfied nationality
<ul style="list-style-type: none"> Secondary students were the most satisfied group and ITP students least satisfied 	<ul style="list-style-type: none"> Students in urban centres tended to report lower levels of life satisfaction than those in less populated areas
<ul style="list-style-type: none"> The highest ranking aspects of life in New Zealand were banking and supermarkets 	<ul style="list-style-type: none"> The least satisfactory aspects of life in New Zealand were public transport, shopping and entertainment. However, 2007 secondary school and tertiary students found public transport significantly better quality than their counterparts in 2003. Shopping was viewed by secondary school and PTE /ELS students in 2007 to be of significantly better quality than that experienced by secondary school and PTE /ELS students in 2003.
<ul style="list-style-type: none"> 74% of students knew their entitlement to work in New Zealand 	<ul style="list-style-type: none"> Students had the most difficulty with finding work in New Zealand and making New Zealand friends
<ul style="list-style-type: none"> 35% of international students were currently in part-time work, mainly in hospitality or retail sectors 	<ul style="list-style-type: none"> Only 6% of part-time workers indicated they did so to improve their English skills
<ul style="list-style-type: none"> More students identified that the purpose of part-time work was to meet living and tuition costs rather than gaining work experience related to their study 	<ul style="list-style-type: none"> 5% of students work more than 20 hours per week, in conflict with their student permit

Forty percent of international students agreed (mildly agreed and / or strongly agreed) with the statement 'I am satisfied with my life in New Zealand'. In contrast to 2003, students in private language schools and secondary schools were more satisfied with their life in New Zealand than tertiary students. Chinese students were the least satisfied with their life in New Zealand, followed by Taiwanese students. However, North America, Brazilian and German students were all highly satisfied with their life in New Zealand. Students from Other Asian countries appeared to be moderately satisfied. Students residing in Auckland were less satisfied than those in the rest of the North and South Islands.

Students' perceptions in 2007 were moderately more positive than those in 2003, and their evaluations of the major features of town and city life were average to good. Students outlined that the areas in which they experienced the greatest difficulty were finding full-time and / or part-time work and making New Zealand friends.

With respect to working in New Zealand, overall 74% of students stated that their student permit allowed them to work part time in New Zealand for up to 20 hours per week; however, a small percentage (14%) stated that their student permits did not allow them to work and 12% were unsure. Thirty-five percent of the students surveyed indicated that they were currently in part-time employment. The sector with the greatest number of students working part time was the tertiary sector, with 48% of ITP and 45% of university students indicating that they were currently in part-time employment.

Those students who work while studying in New Zealand typically worked in hospitality (41%) and / or retail / sales (17%) sectors. The main reason students gave for opting to work part time was to meet living and tuition costs, with 47% of students stating this was their main reason for working.

To gain work experience directly relating to their area of study was also identified by just over a quarter of the students (26%) and a further 21% of students worked part time simply to gain general work experience in New Zealand.

FUTURE PLANS

Key Finding	Development Opportunities
<ul style="list-style-type: none"> 16% of students intend to continue further studies in New Zealand 	<ul style="list-style-type: none"> 57% of tertiary respondents were aware of special work permits available to them
<ul style="list-style-type: none"> 61% of international students intended to apply for permanent residence in New Zealand 	<ul style="list-style-type: none"> 26% of students from ESANA countries intended to return home for further study while only 2% of Chinese intended to do this
<ul style="list-style-type: none"> Despite their dissatisfaction with aspects of life in New Zealand, a large proportion of Chinese students (56%) proposed to stay in New Zealand and find employment 	

In total, 16% of the students intended to continue further studies in New Zealand. This is in contrast to 42% in 2003. However, this result possibly reflects the composition of the sample in 2003 and the high number of secondary school students surveyed. This may also explain the higher number of students (42%) in 2007 who indicated that they intend to find a job in New Zealand, in contrast to only 11% in 2003.

Future plans varied across educational sectors. Secondary school students generally plan to enrol for further studies, either in New Zealand (35%) or their home country (48%). For PTE / ELS students the numbers are slightly lower; however, 15% plan to continue studies in New Zealand or at home (15% also). University-based tertiary students are more likely to seek employment, most frequently in New Zealand (50%); however, 10% plan to enrol in further studies in New Zealand, and 14% plan to seek employment in their home country.

Students from China are more likely to continue their studies in New Zealand (14%) than in their home country (2%), as are students from Other Asian countries (19% in New Zealand and 12% in their home country). The reverse is true for ESANA students. Only 10% are likely to continue their studies in New Zealand, with 26% likely to go home and complete their studies.

In contrast to the 2003 results, a high percentage of Chinese students (56%) reported that they intend to stay in New Zealand and find employment, compared to 32% from Other Asian countries and 27% from ESANA countries.

International students did not have a strong awareness of the special work permits (Study to Work) that are available for them. In total, only 48% of students were aware of the special work permits. Testing showed a strong and statistically significant relationship existed between awareness of special work permits and intention to work in New Zealand.

In 2007, only 15% of students indicated that they planned to apply for permanent residence in another country. In 2003 this figure was 30%. In contrast, 61% of the international students surveyed stated that they intended to apply for permanent residence in New Zealand, which was up from 42% in 2003. Students indicating that they would apply for permanent residence in New Zealand were more likely to come from ITPs (81% of ITP respondents applying for permanent residence) and universities (67%). Secondary school students were the least likely to seek permanent residence.

6.0

FUTURE RESEARCH & DEVELOPMENT RECOMMENDATIONS

The research findings from the 2007 international student survey provide a comprehensive summary of the general feeling of international students studying in New Zealand. It is recommended that the Ministry of Education continue to replicate the research study in order to regularly monitor the satisfaction and changing experiences of international students in New Zealand.

However, to ensure the different sector groups derive value from the survey, a greater level of consultation may be needed to ensure the questions asked are addressing the information needs of the different sector groups. The administration of the National Survey frequently requires cooperation from education institutions across New Zealand. Therefore, it is important education institutions recognise the value of the survey and the information it may produce.

The online administration of the survey was used for the first time in 2007. The electronic survey tool was robustly piloted to determine whether or not it was a suitable mechanism to administer the National Survey. The research concluded that online administration worked very effectively – and it is strongly recommended that this form of administration is adopted in any future conduct of the National Survey.

Consideration should be given to reviewing the survey questions and the value of delivering one survey to all sectors groups. The survey currently consists of over seventy questions and is time consuming for international students to complete. Consistently during piloting, students commented on the length and time-consuming nature of the survey.

In addition to the above suggestions, the research findings suggest that other initiatives might be established by the Ministry, including those proposed below:

- The Ministry of Education and Education New Zealand may wish to examine the feasibility of establishing a special purpose fund for education institutions wishing to develop, implement and / or extend existing cultural awareness programmes in their institutions.
- The Ministry of Education may wish to encourage increasing interaction between local and international students by promoting strategic objectives in sector-specific Internationalisation Plans (i.e. support services, teaching, learning and curriculum development).
- The Ministry of Education in partnership with Education New Zealand could initiate a stocktake of what initiatives are currently being undertaken by education providers to assist cultural awareness in education institutions and publish case studies of those practices that are proving to be effective.
- Further market research should be carried out by the Ministry of Education on the expectations of Chinese students. A great deal of research focuses on Chinese students' experiences in New Zealand; however, little seems to address what expectations Chinese students have and why they choose to study in New Zealand. In particular, the research needs to understand why Chinese students' expectations vary markedly from other nationalities'. A comparative qualitative study examining other student groups' (depth market group) expectations – including New Zealand students – would be useful in order to better understand satisfaction drivers for key markets;

- At a local and institutional level, institutions should be actively encouraged to explore ways in which the wider community and New Zealand students can be better educated on international students. This may involve institutions developing programmes for assisting local students in gaining experience of international students, other cultures and cultural sensitivities.
- As in 2003 the research findings suggest that institutions need to do more to promote the services and / or facilities available to international students. At a local and institutional level, there is an opportunity for institutions to improve the awareness of services. It is recommended that institutions evaluate where resources could best be applied. The results would suggest financial advisory services and buddy programmes would be positively received and these may not be difficult or expensive to implement.
- The Ministry of Education could initiate the development of a communication and cultural handbook to better educate all students – international and domestic. For example, a domestic and international students' version could be developed, outlining the various cultural differences to expect etc.
- Conducting exploratory qualitative research into the 'depth market' countries of interest to the Ministry. The limitation of the 2007 research with respect to depth market analysis was that it failed to provide large enough samples of the many different depth markets to conduct reliable and robust statistical analysis.

Given the integration of Department of Labour questions in 2007, another area which may warrant further research is the synergies between international student enrolment, employment opportunities and permanent residence achievement.

In recent research, Verbik and Lasanowski (2007) report that chronic skills shortages are highlighting the importance of attracting international students, in terms of potential short- and long-term gains for institutions and countries. It is now very common for Western economies to actively seek to retain international students after graduation.

In many respects, recruiting overseas talent to compensate for local skills workforce shortages will become increasingly important. Indeed, in the wider socio-economic context, developed countries are looking to attract foreign skilled labour to supplement their rapidly decreasing labour pool and ageing population. The 2007 research has begun to examine some important aspects regarding the enrolment, employment and residence relationship. Thus, future research should continue to focus on furthering this knowledge base by examining study-work pathways, and the labour market and social integration outcomes of international students who have decided to stay in New Zealand temporarily for work or on a longer-term basis. Such research would assist in highlighting the challenges international students face while working and living in New Zealand.