



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

## TERTIARY STUDENT MOBILITY

Note: N/A means data is not available in the UNESCO data

**2.20%**

2.2 of every 100 tertiary students from CHINA were studying abroad in 2020

**1.3%**

Australia has 11.8% share  
13815 of the 1088466 outbound tertiary students from CHINA studied in New Zealand in 2020

**12th**

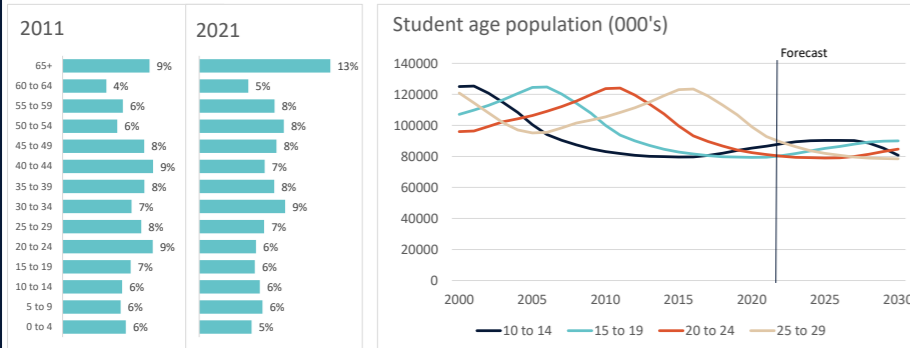
Australia is 3rd  
New Zealand is the 12th largest market for outbound tertiary students from CHINA

**N/A**

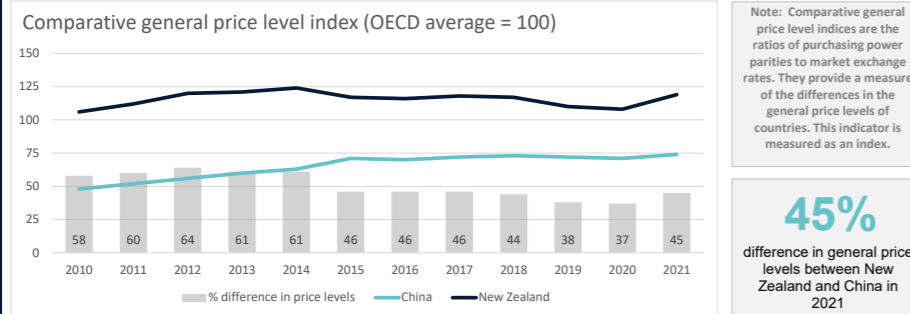
New Zealand tertiary students studied abroad in CHINA in 2020

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.

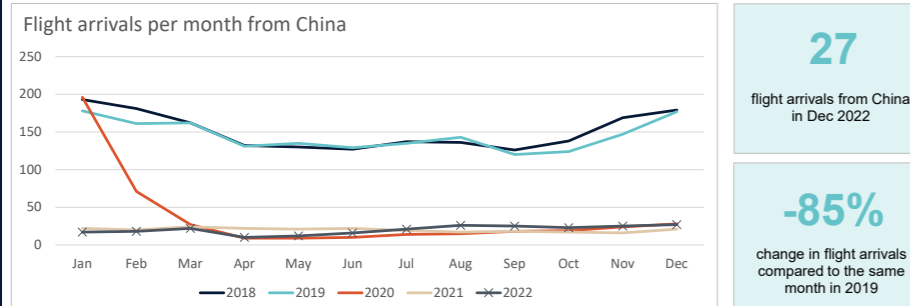
## POPULATION



## AFFORDABILITY



## FLIGHTS

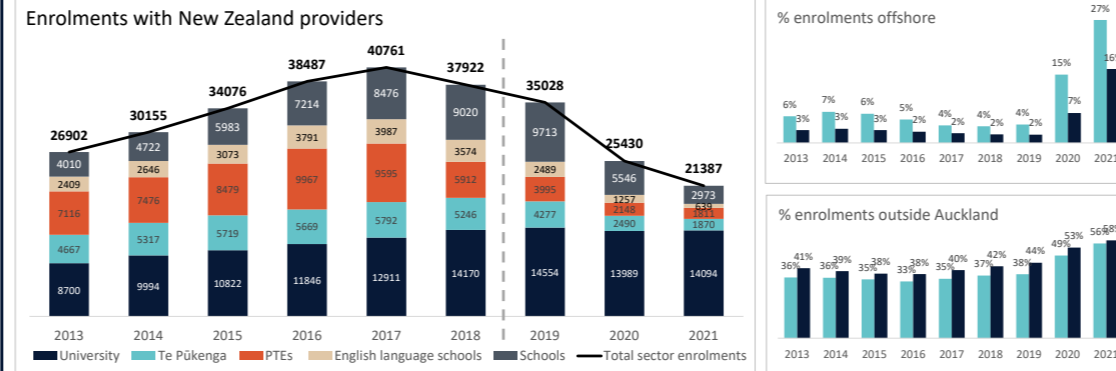


**Data sources:**

- UNESCO UIS International mobility data (2020) <https://uis.unesco.org/en/uis-student-flow>
- UN Population Division <https://population.un.org/wpp/Download/Standard/Population/>
- Comparative general price level index, OECD <https://data.oecd.org/price/price-level-indices.htm>
- Flight arrivals StatsNZ [http://infoshare.stats.govt.nz/\\_select?Tourism->International+Travel+and+Migration+ITM->Number+of+flights+by+direction+and+overseas+port+\(Monthly\)](http://infoshare.stats.govt.nz/_select?Tourism->International+Travel+and+Migration+ITM->Number+of+flights+by+direction+and+overseas+port+(Monthly))
- ENZ student enrolment data (2013 to 2021); Tableau online <https://prod-apsoutheast-1-online.tableau.com/#/site/educationnewzealand/views/OnshoreEnrolments2021/Tables?id=1>
- Immigration New Zealand student visa data (April 2019 to present)
- Student experience <https://intellilab.enz.govt.nz/document/682-international-student-experience-survey-2021-final-report>
- ENZ brand tracker (2020 to present)
- ENZ brand tracker <https://intellilab.enz.govt.nz/document/695-enz-brand-tracker-june-2022-final-report-pdf>

## ENROLMENTS

Note: A student may enrol with more than one provider/course/region during an academic year, so the sum for provider/course/region will often sum to more than the sum of the headcount. Note: There was a change in methodology from 2019, so data from 2013-20118 is not directly comparable to 2019 onwards



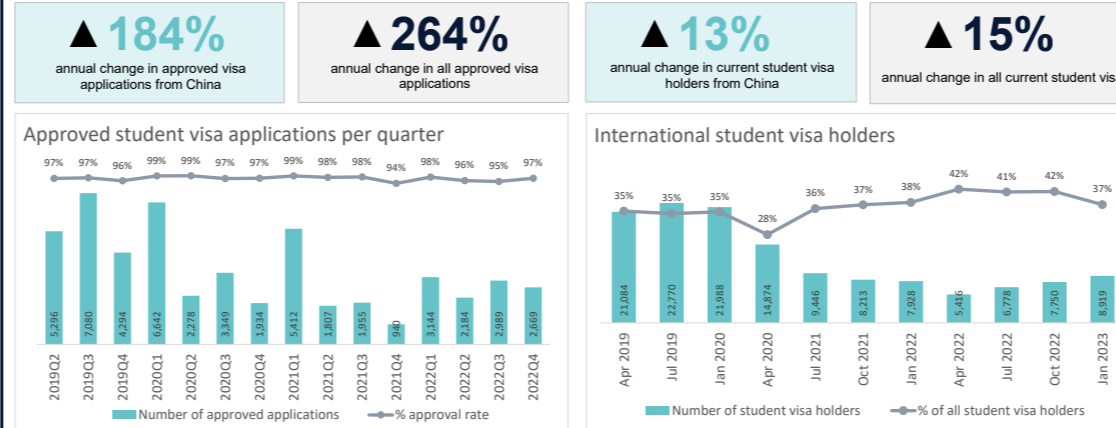
Top 3 study fields in each of the past two years

Year	Top 1	Top 2	Top 3
2021	Business and management (5363 enrolments)	Language and literature (4310 enrolments)	Computer science (3446 enrolments)
2020	Business and management (5863 enrolments)	Language and literature (5609 enrolments)	Computer science (3137 enrolments)

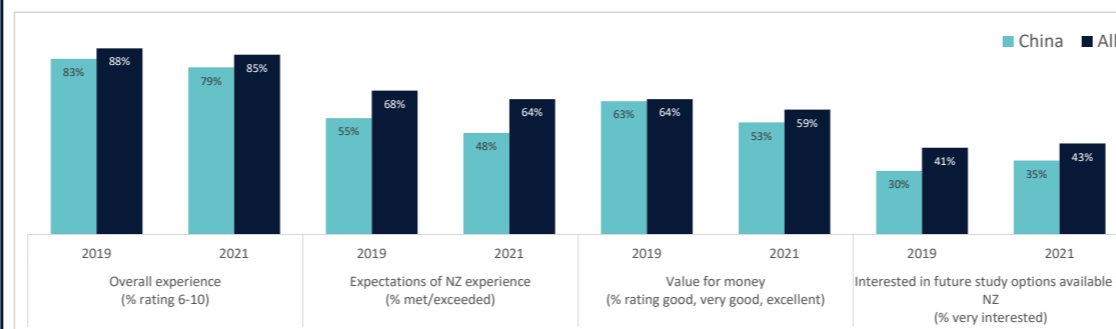
Note: Study field is for tertiary sector and ELS enrolments only. ELS enrolments are included in the study field called Language and literature

## STUDENT VISAS

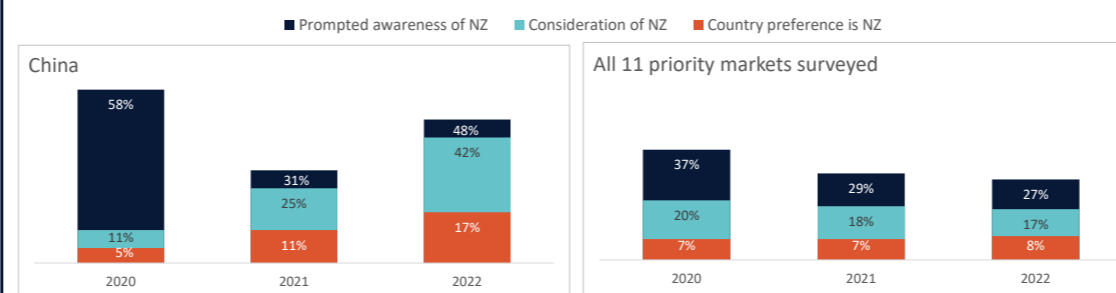
A valid student visa holder is a person with authority to study a course of three or more months in duration. It does not mean these students are present in New Zealand. Student visa applications include onshore and offshore applications.



## STUDENT EXPERIENCE



## BRAND HEALTH



## 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.

## ENZ IN-MARKET STAFF CONTACT

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