

New Zealanders' perceptions of the value of international students

Survey findings

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Background & objectives

Background

The aim of this research is to understand New Zealanders' perceptions about the value of international education to New Zealand.

This work helps measure progress towards goal 3 of the New Zealand International Education Strategy He Rautaki Mātauranga A Ao (NZIES): New Zealanders understand and embrace the benefits of international education.

As stated in the NZIES, Education New Zealand Manapou ki te Ao (ENZ) is responsible for proactively telling the story of international education in New Zealand and the social, cultural, and economic benefits it delivers for all New Zealand.

A thriving and sustainable international education sector needs the support and buy-in of New Zealanders (social license – defined as the ongoing acceptance of a sector's (in this case the international education sector) practices by the general public).

ENZ has been monitoring social license for international students in-country since 2016.

Objectives

Research objectives include understanding:

- The issues of most importance to New Zealanders
- Perceptions about New Zealand's economy and what things are most important to improve it
- Perceptions of the social, cultural and economic benefits of international education/students
- Subgroup differences in perceptions.

Measuring social license



Modified from Thomson & Boullier, 2011

Methodology

Methodology



A 6-minute online survey was sent to 1100 New Zealanders on the Ipsos FastFacts NZ panel.

Results are broadly representative of the New Zealand adult population by age, gender, and region.

Results presented are for the total sample.

No detailed statistical analysis has been undertaken by sub-groups at this time point. However general observations have been made.

Comparability of questions with previous surveys was maintained on key indicators of support and the value international students bring.

Where possible comparisons have been made between 2023 results with earlier years.



SOCIAL LICENSE SURVEY 2023

Ipsos Fast Facts NZ Panel

Sample size: n=1,100

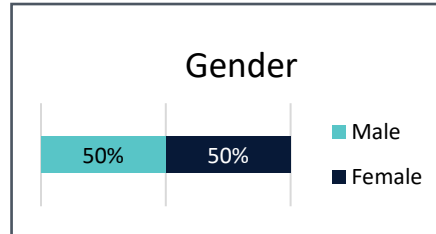
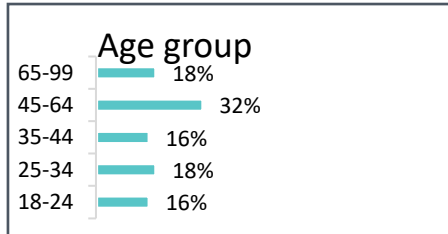
The maximum margin of error is $\pm 3.0\%$.

Fieldwork dates:

27 Nov to 1 Dec 2023



The 1100 Respondents were broadly representative of the NZ population



Income

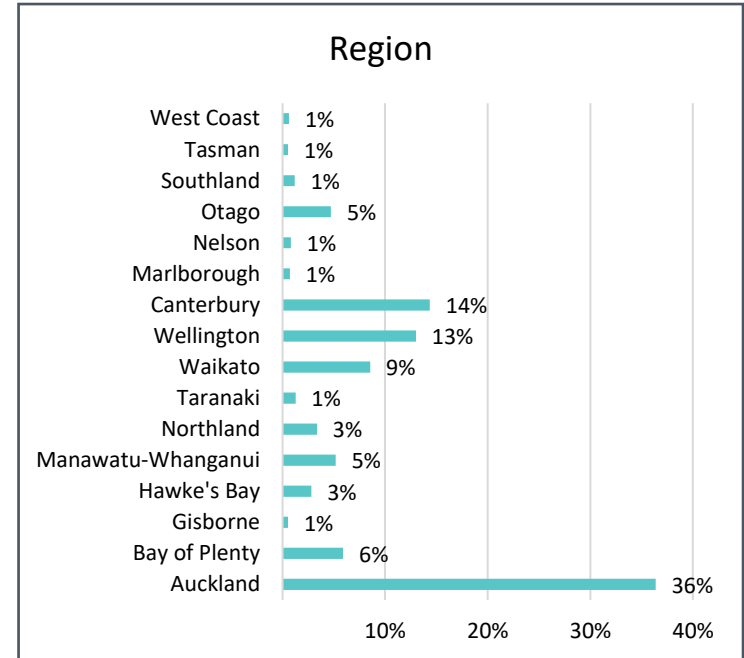
Income	Percentage
\$0-\$30,000	14%
\$30,001-\$60,000	21%
\$60,001-\$100,000	25%
\$100,001-\$150,000	19%
\$150,001 or more	14%

Ethnic group identity

Ethnic group identity	Percentage
New Zealand European	65%
Māori	14%
Pacific	7%
Other European	10%
Asian	18%
Other	4%

Education qualification

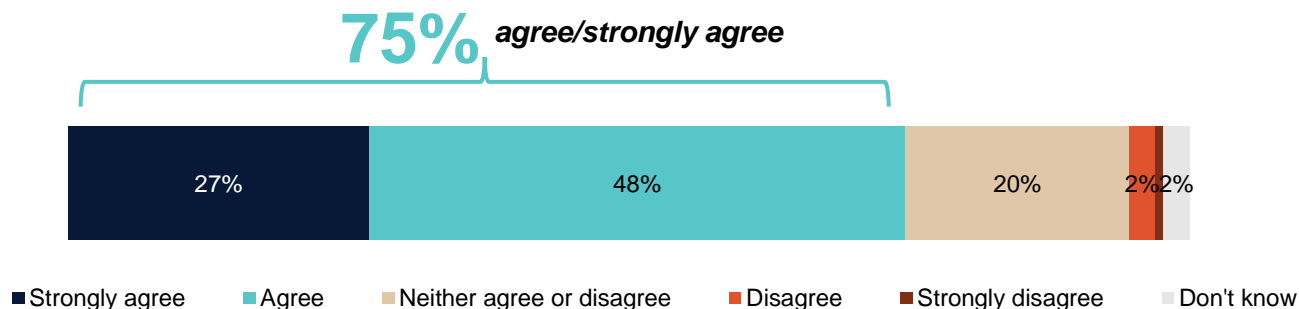
Education qualification	Percentage
Level 4 certificate or less	41%
Level 5 & 6 diploma	14%
Bachelor degree and level 7 qualification	26%
Post-graduate (Honours, Masters, Doctorate)	16%
Overseas secondary school qualification	3%



Key findings

75% of New Zealanders believe that international students benefit New Zealand, similar 73% in 2022.

Overall, to what extent do you agree or disagree that international education / international students benefit New Zealand?



When asked why, the economic benefit stood out (with 'Money' and 'Economy' mentioned in 20% and 18% respectively of all responses (n=1043), **but it wasn't just about money**



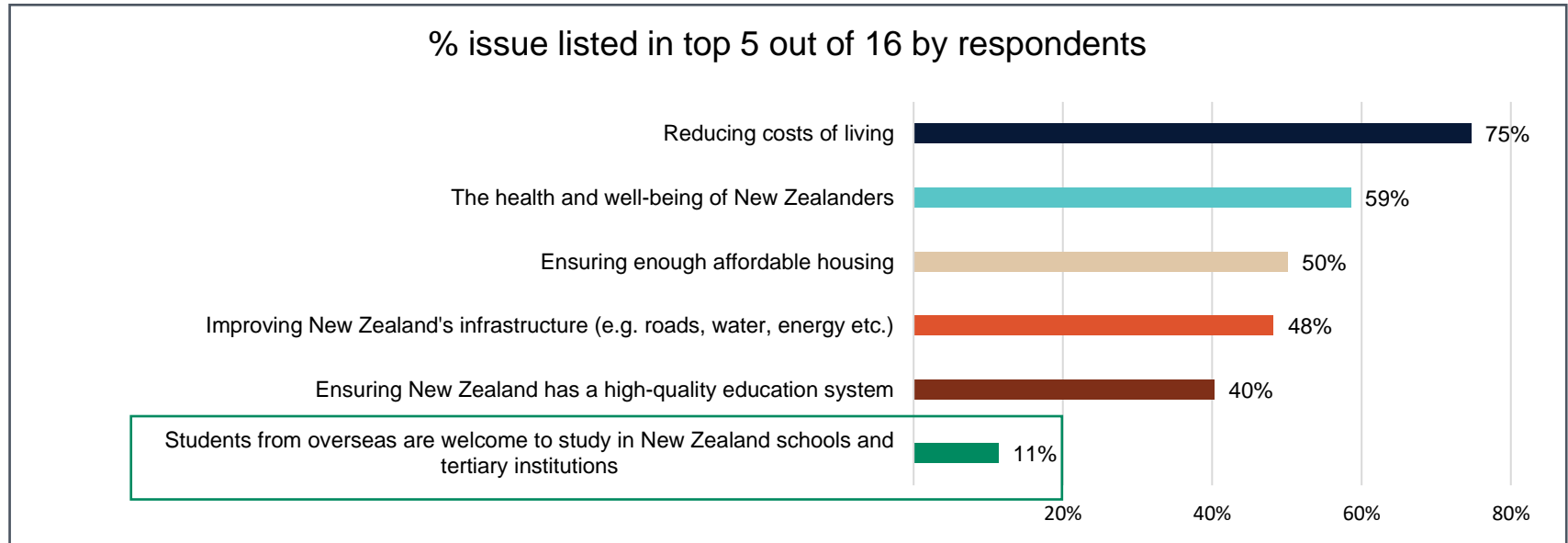
I think international students bringing and sharing their culture to NZ makes our country richer. We all have something to learn from international students. They are good for our economy. It is a great opportunity for young people to build relationships outside their usual social circles and allows them to see new perspectives.

(Quote from respondent who 'Strongly agreed')



However, international education/students remain a low priority as a front of mind issue for New Zealanders.

- Cost of living, health and housing are the three most important issues for most New Zealanders of the 16 issues listed. This is the same as last year.
- 'Students from overseas are welcome to study in New Zealand schools and tertiary institutions' ranked 14th out of 16 and was mentioned by 11% in their top five, which is like 2022 at 12%.



In 2023 the strongest support was for local and cultural contributions

Statement	% Strongly Agree / Agree	
	2023	2022
International students contribute to local businesses during their studies (e.g. spending, working while studying etc)	80%	80%
International students help local students learn about other cultures and/or ways of life	81%	76%
International students contribute to New Zealand's cultural diversity	81%	79%

It is beneficial for the educational institutions as they pay higher (or non-subsidised) fees, it is good for tourism and it is good for expanding our multiculturalism

It strengthens our educational system, students are able to interact with students from different cultural backgrounds, and they bring a lot of money into NZ educational institutions.

International students bring to New Zealand a unique perspective of business and economy and also a piece of their own country and culture which helps inspire fresh new ideas and offerings to the NZ economy and consumers.

Key findings – challenges to support

- Overtime, there has been a gradual positive shift in agreement for the benefits international students bring both economically and culturally.
- However, there are persistent challenges that remain to social license support for international students in country
- Differences in support by demographics are observable, and consistent with that reported for 2022

Perceived challenges:

- The most widely perceived challenge, as perceived by half of New Zealanders, was that international students use New Zealand's education system as a means to residency.
- Nearly 30% of New Zealanders thought that New Zealand's infrastructure isn't well-equipped to allow for international students and that they make it harder for New Zealanders to get jobs.
- Positively, fewer New Zealanders are agreeing that these things are challenges compared to 2018. And, that students take jobs from New Zealanders

Demographics:

Overall perception of the value of international students and the different benefits they bring to New Zealand tend to be higher for:

- Older New Zealanders; people of Asian descent; people in households with incomes of \$100,001 or more; and people whose highest level of education is degree of higher.
- In contrast younger New Zealanders; people with lower levels of education; people in households with incomes of \$50,000 or less; and people living outside New Zealand's main centers tend to be less aware of the value and benefits international students bring to New Zealand.

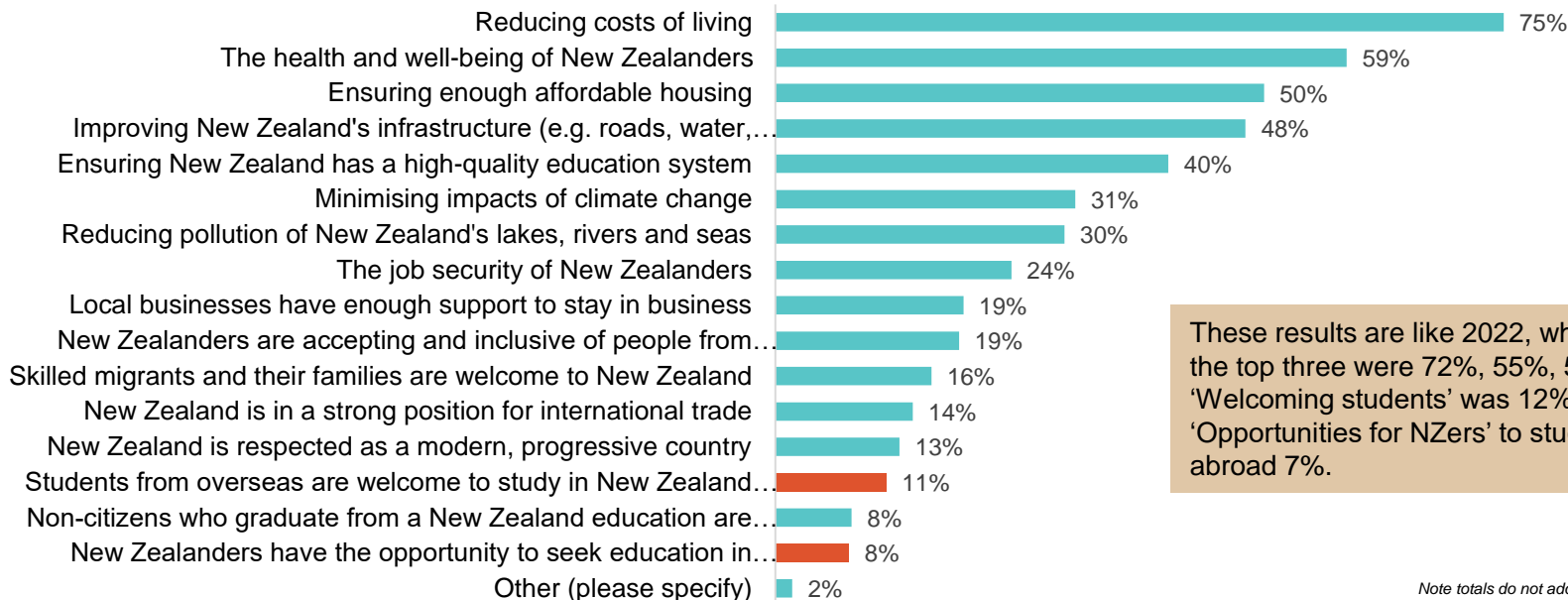
New Zealanders front of mind issues and the economy

*Providing the context for
international education as an issue
and contributor to the economy*



Cost of living was most frequently selected of importance to New Zealanders (75%), followed by health (55%), and housing affordability (51%). Few New Zealanders (11%) noted welcoming international students to NZ as an important issue.

Issues that are important to New Zealanders in Nov 2022 are very similar to Nov 2021



These results are like 2022, where the top three were 72%, 55%, 51%. 'Welcoming students' was 12%, and 'Opportunities for NZers' to study abroad 7%.

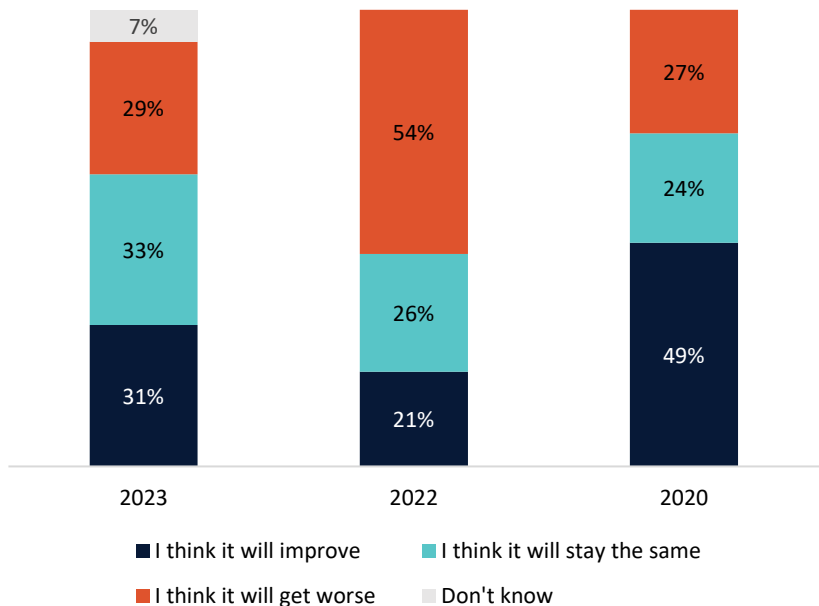
Note totals do not add up to 100% as respondents could select up to five options

Base: All respondents: n=1100. Ipsos Fast Facts, Nov 2023

Source question: Firstly, we would like to find out about the most important issues to New Zealanders. Listed below are a range of issues that people have described as being important to them. Please take the time to look through the full list, then select the ones you feel are most important to you. Please select up to five options

31% of New Zealanders think the economy will improve in the next year. International tourists were identified most frequently by 50% as important to improving the economy, compared to 23% identifying International students.

Feelings about New Zealand's economy



Most important things to improve the economy



Note totals do not add up to 100% as respondents could select up to three options

Base: All respondents (2023 n=1100; 2022: n=957; 2020: n=560 excluding don't know).

Source questions: How do you feel about the New Zealand economy over the next 12 months? Which of the following do you think are the most important to help improve the New Zealand economy? Please select up to three options.

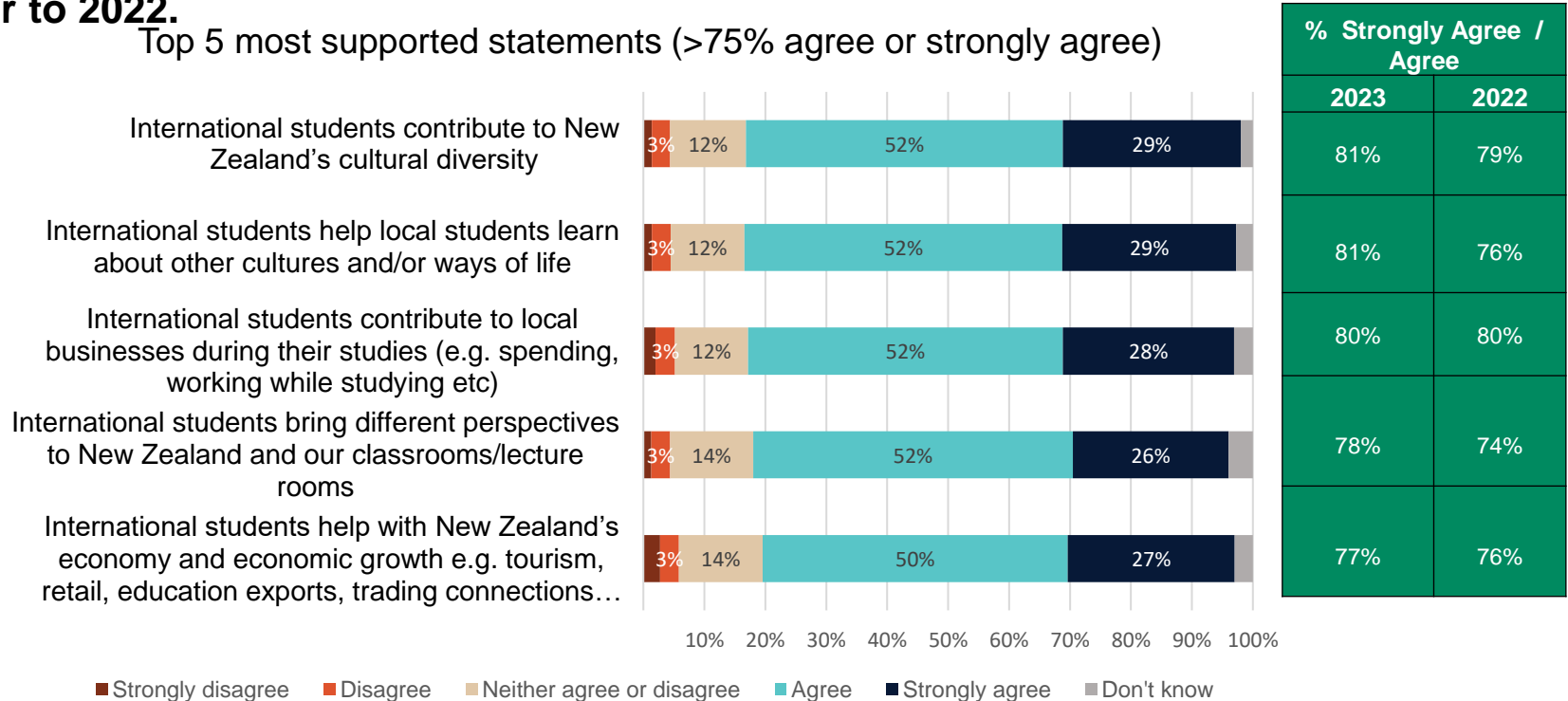
Perceptions of the contribution and challenges of international students

15 statements were presented.



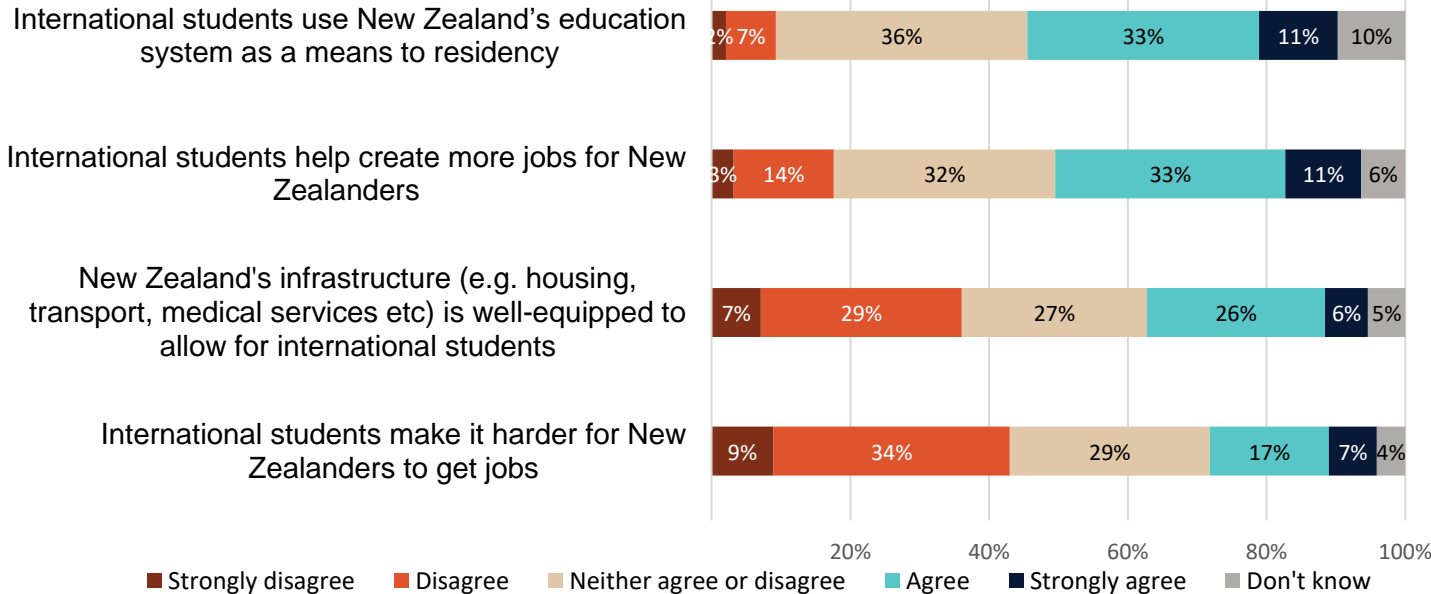
There was strong support and recognition of these values that international students bring: (i) international students contribute to cultural diversity, (ii) learning about other cultures, and (iii) contribute to local businesses during their studies. These results are similar to 2022.

Top 5 most supported statements (>75% agree or strongly agree)



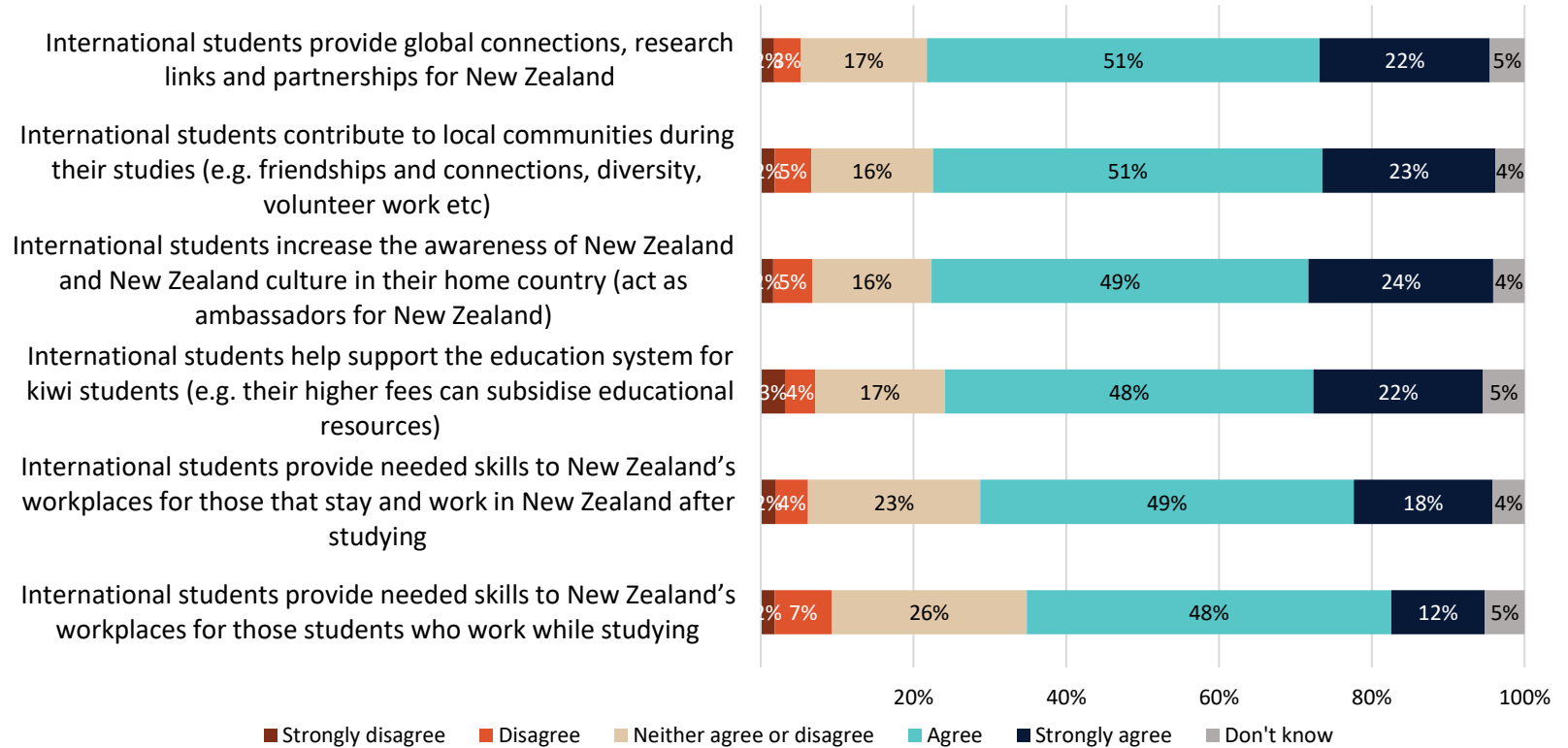
Areas where there are least support (less than 50%) for international students were infrastructure is well equipped to allow for international students, students using study as a means to residency, and help create jobs for NZers. These results are similar to 2022 except for making jobs harder for NZers

Least supported statements



% Strongly Agree / Agree	
2023	2022
45%	50%
44%	45%
32%	35%
23% 😊	43%

Support was generally positive (60% > 75% (Agree / Strongly agree) for these other statements. The results are like 2022

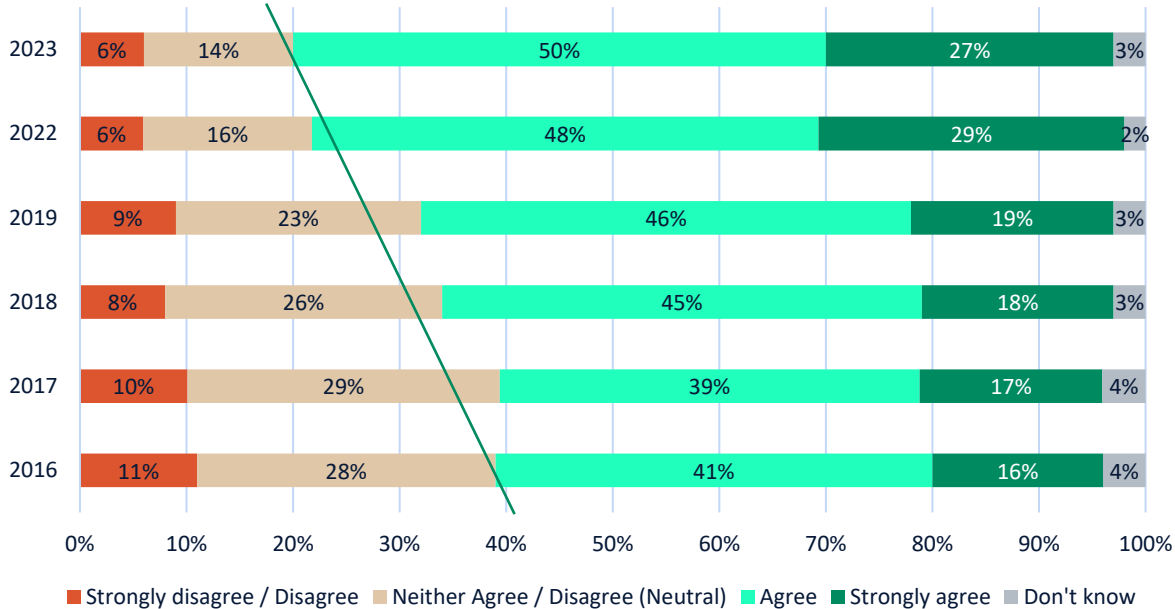


Change over time in support for international students in-country on key statements aligned with the NZIES

Support for statement:

Gradual positive shift since 2016 towards more support for the statement

International students help with New Zealand's economy and economic growth e.g. tourism, retail, education exports, trading connections and networks etc



Changes

- Since 2016 there has been a steady gradual shift towards more support in the NZ population agreeing and strongly agreeing that international students help with New Zealand's economy and economic growth.
- The proportion who are neutral and disagreed has gradually but steadily decreased over time.

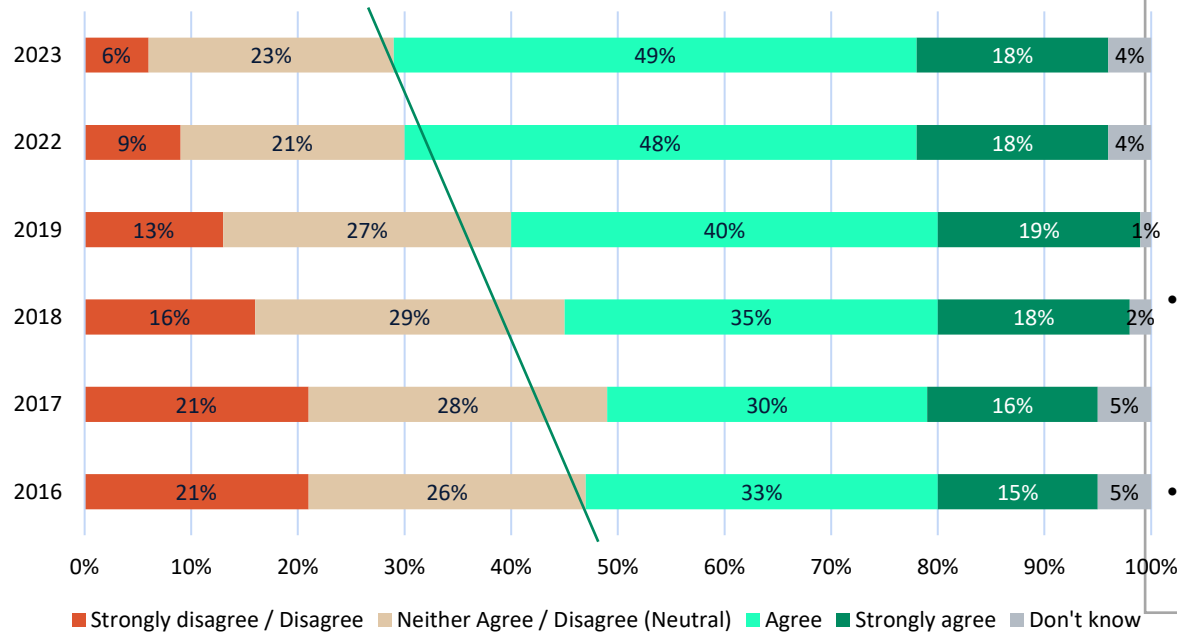
Base: All respondents: 2016 n=1000; 2017 n=1000; 2018 n= 1000; 2019 n= 1001; 2022 n= 1012; 2023 n=1100



Support for statement:

Gradual positive shift since 2016 towards more support for the statement

International students provide needed skills to New Zealand's workplaces for those that stay and work in New Zealand after studying



Changes

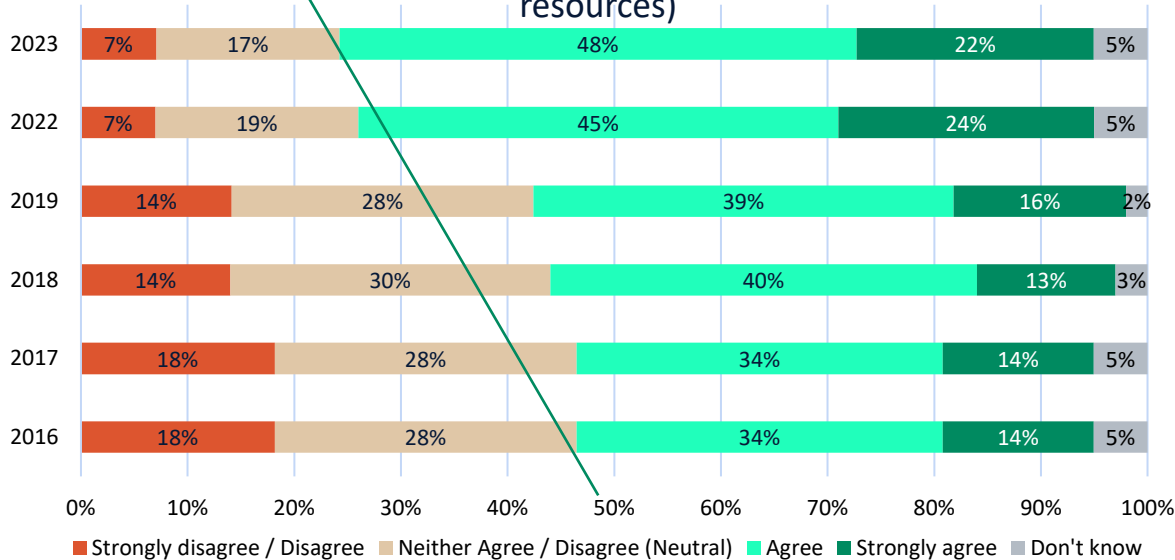
- The proportion of respondents agreeing that international students provide needed skills to New Zealand's workplaces for those that stay and work in New Zealand after studying has increased each year since 2017
- In 2023, 67% of New Zealanders agreed/strongly agreed with this statement compared to 46% in 2017.
- The proportion disagreeing has also significantly decreased.

Base: All respondents: 2016 n=1000; 2017 n=1000; 2018 n= 1000; 2019 n= 1001; 2022 n= 1012; 2023 n=1100

Support for statement:

Positive shift since 2016 towards more support for the statement

International students help support the education system for kiwi students (e.g. their higher fees can subsidise educational resources)



Changes

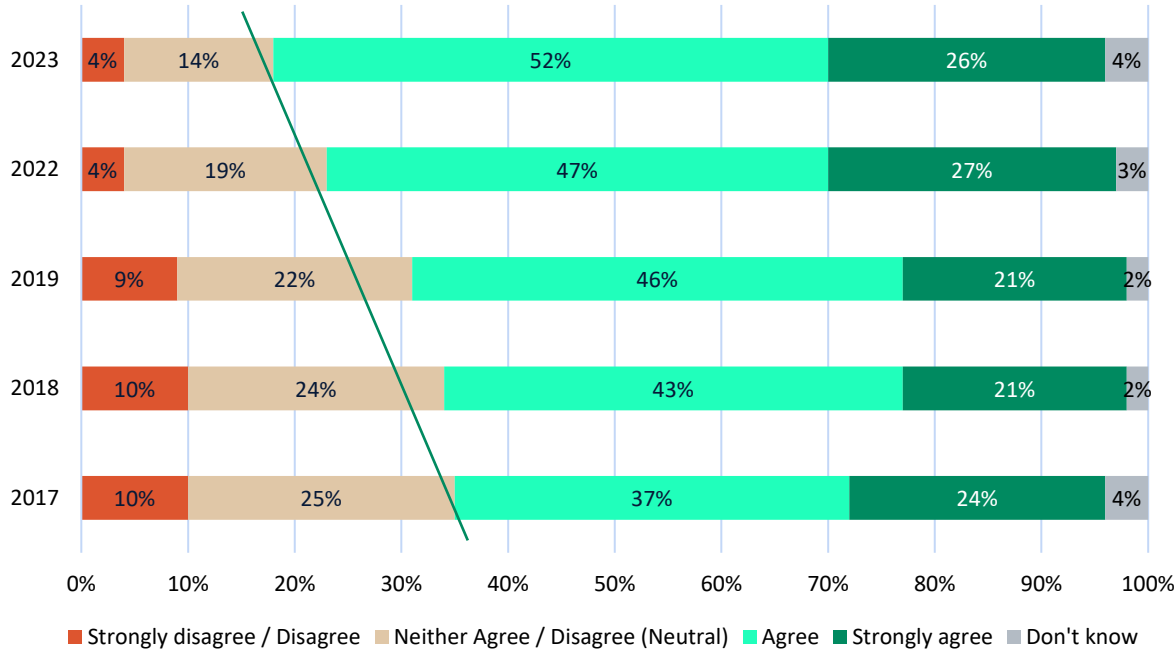
- There has been a steady increase in the proportion of the population agreeing/strongly agreeing with this statement from 58% in 2017 to 70% in 2023.
- Similarly, a decrease in neither agree/disagree or disagree/strongly disagree.

Base: All respondents: 2016 n=1000; 2017 n=1000; 2018 n= 1000; 2019 n= 1001; 2022 n= 1012; 2023 n=1100

Support for statement:

Gradual positive shift since 2017 towards support for the statement

International students bring different perspectives to New Zealand and our classrooms/lecture rooms



Base: All respondents: 2016 n=1000; 2017 n=1000; 2018 n= 1000; 2019 n= 1001; 2022 n= 1012; 2023 n=1100

Changes

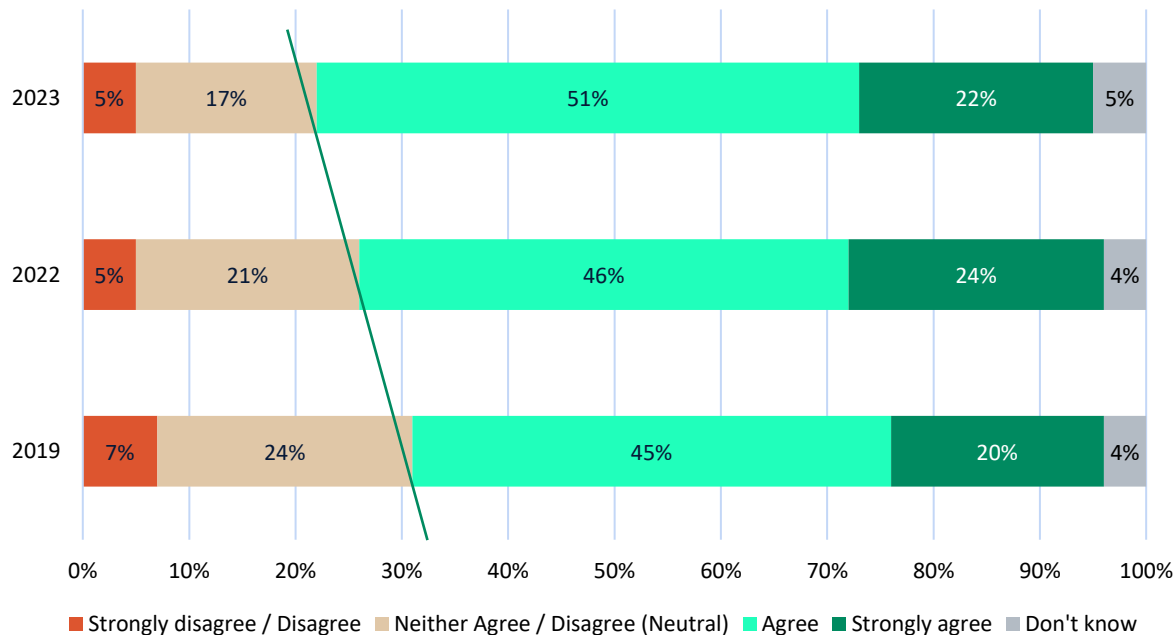
- There was a steady increase in the proportion of respondents agreeing (agree and strongly agree) with this statement from 2017.
- Since 2017 the support has increased from 61% to 78% who agree/strongly agree.



Support for statement:

Slight positive shift in support of the statement

International students provide global connections, research links and partnerships for New Zealand



Changes

- The proportion of New Zealanders that agree (agree and strongly agree) with this statement increased from 65% in 2019 to 73% in 2023.

Base: All respondents: 2016 n=1000; 2017 n=1000; 2018 n= 1000; 2019 n= 1001; 2022 n= 1012; 2023 n= 1100



Challenges to social license

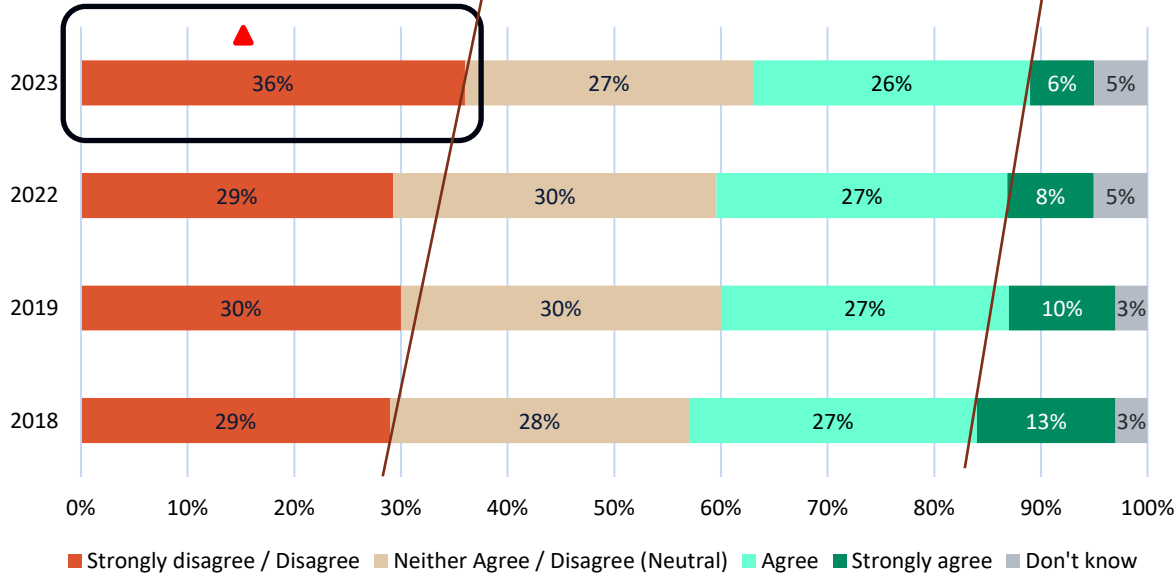
Change over time



Less support for:

Infrastructure remains a substantive challenge for growing support for more international students in country.

New Zealand's infrastructure (e.g. housing, transport, medical services etc) is well-equipped to allow for international students



Base: All respondents: 2018 n= 1000; 2019 n= 1001; 2022 n= 1012; 2023 n =1100

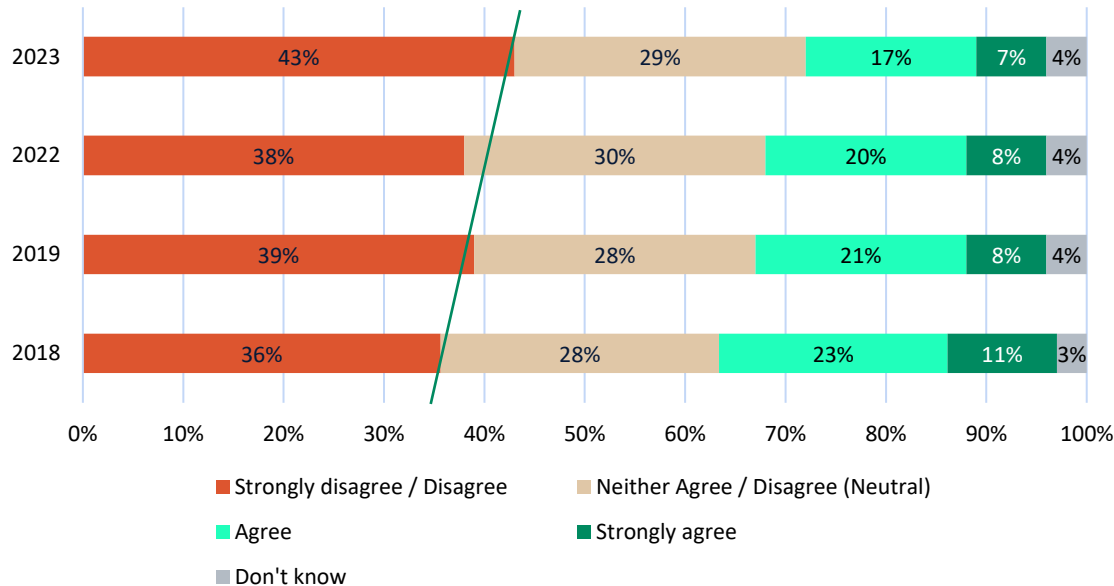
Changes

- In 2023, only 32% Agree/strongly agree the infrastructure is 'well-equipped' to allow for international students, which is down from 40% in 2018 and 37% in 2019.
- This change in sentiment in 2023 can also be seen in the jump to 36% of those who Strongly disagree/disagree that NZs infrastructure can support growth in international students. Up from 29% - 30% in previous years.
- Mixed sentiment around the question of infrastructure has been a consistent theme over time.

Perception of challenge:

There has been a decrease overtime in support for this statement (Strongly agree/agree) since 2018, however substantial ambivalence remains.

International students make it harder for New Zealanders to get jobs



Changes

- There has been a decrease in 2023 in the proportion of New Zealanders who Strongly agree / agree that international students make it harder for New Zealanders to get jobs. This is a positive shift in social license for international students.
- Overtime the decrease in support has been from 34% who Strongly agree/agree in 2018 to 24% in 2023. This is a positive shift for social license support.
- However, there is a substantive ambivalence about this topic remains in the population given the approx. 30% who neither agree or disagree.

Base: All respondents: 2018 n= 1000; 2019 n= 1001; 2022 n= 1008; 2023 n =1100

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