Factsheet: Indonesia

Updated: August 2015

Purpose:

The purpose of this document is to provide an update on key statistics on international students in this market. It draws on several datasets, specifically the Export Education Levy figures (for full fee-paying numbers) and the Single Data Return (SDR) (for a comprehensive dataset of international students).

Developed by Education New Zealand
For more information please contact: intelligence@enz.govt.nz
Key headline figures

- **Student numbers:** 865 Indonesian international students studied in 2014, up 16% (119) compared to 2013
- **Total number of tertiary mobile students:** 39,098
- **Population:** 250 million (2014)
- **GDP:** USD $888 billion (2014), NZD $1.35 trillion (2014)
- **GDP per capita:** USD $3,553 (2014), NZD $5,405 (2014)

Socio-economic and business context

Indonesia’s economy successfully withstood the negative impact of the 2008-2009 global financial crisis, owing to ample internal demand stemming from its large population. However, the business environment faces challenges ranging from labour market rigidity to inadequate infrastructure. The government’s commitment to increased educational spending and its vast infrastructure development plan should redress the balance but rising wages could hamper competitiveness and increase inflation.

The economy is forecast to slow slightly in 2014. Consumer spending is the main driver while sluggish investment, anaemic exports and tighter credit limits restrict the pace of growth. Around 7 million people enter the middle income class each year and this trend is expected to continue in the medium-term. Fuel subsidies create fiscal problems. Inflation is uncomfortably high and well in excess of the central bank’s target range.

Population was 247 million in 2013, an increase of 96 million since 1980. The median age is currently 28.9 years, up from 19.0 years in 1980. Fertility has been more than halved since 1980 and presently stands at 2.0 births per female. As fertility continues to fall, Indonesia will experience an ageing process. The number of those over 65 years totalled 14.4 million in 2013 or 9 million greater than in 1980.

Market summary

Indonesia is an emerging market for international education. It is currently the 21st largest source country for international students for New Zealand.

Student numbers have been recovering since a significant decline in 2007, which was down 38% on 2006. There has been a shift towards higher level provision, with 45% of all Indonesian students now studying at university level. There has been a notable increase in postgraduate enrolments since 2009.

Australia has experienced a 6% decline in Indonesian enrolments since 2010. Indonesia is a key market for Australia, however they have not been able to reverse the declining trend.

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1 UNESCO - students studying at ISCED levels 5 and 6
2 Euromonitor
Full year student numbers 2006-2014

- 684 Indonesian international full fee-paying students studied in New Zealand in 2014, up 14% (84) on 2013.
- The Export Education Levy data varies from ENZ data due to differences in methodology. See the glossary on page 11 for more information.
The university sector grew by 16% (55) and the PTE sector grew by 16% (45) in 2014.
The secondary school sector also experienced strong growth in 2014, up 18% (11) on 2013.

45% of Indonesian students studied in the university sector in 2014, with 38% enrolling in the PTE sector.
Tertiary sector trends

- Enrolments at level 8 honours/postgraduate certificates increased by 12% (7), level 9 masters’ degrees increased by 68% (39), and level 10 doctoral degrees increased by 34% (31) in 2014.
- Level 4 certificates declined by 29% (-22), and level 1-3 certificates declined by 18% (-8) on 2013.

<table>
<thead>
<tr>
<th>Indonesia: proportion of tertiary enrolments by level</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1-3 Certificates</td>
<td>6%</td>
</tr>
<tr>
<td>Level 4 Certificates</td>
<td>8%</td>
</tr>
<tr>
<td>Level 5-7 Diplomas</td>
<td>16%</td>
</tr>
<tr>
<td>Level 7 Bachelors’ degrees</td>
<td>25%</td>
</tr>
<tr>
<td>Level 7 Graduate certs/dips</td>
<td>2%</td>
</tr>
<tr>
<td>Level 8 Honours/postgrad certs</td>
<td>10%</td>
</tr>
<tr>
<td>Level 9 Masters’ degrees</td>
<td>15%</td>
</tr>
<tr>
<td>Level 10 Doctoral degrees</td>
<td>19%</td>
</tr>
</tbody>
</table>

- 25% of Indonesian tertiary enrolments were in level 7 bachelors’ degrees and 19% were in level 10 doctoral degrees in 2014.

<table>
<thead>
<tr>
<th>Indonesia: proportion of tertiary enrolments</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Below Undergrad (L1-7)</td>
<td>36%</td>
<td>38%</td>
<td>38%</td>
<td>34%</td>
<td>30%</td>
</tr>
<tr>
<td>Undergrad (L7)</td>
<td>33%</td>
<td>26%</td>
<td>26%</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>Postgrad (L7+)</td>
<td>31%</td>
<td>37%</td>
<td>35%</td>
<td>38%</td>
<td>46%</td>
</tr>
</tbody>
</table>

- 46% of tertiary enrolments were at the postgraduate level in 2014, up from 31% in 2010.
### Indonesia: proportion of tertiary enrolments by field of study 2014

<table>
<thead>
<tr>
<th>Field of Study</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Environmental and Related Studies</td>
<td>1%</td>
</tr>
<tr>
<td>Architecture and Building</td>
<td>2%</td>
</tr>
<tr>
<td>Creative Arts</td>
<td>8%</td>
</tr>
<tr>
<td>Education</td>
<td>3%</td>
</tr>
<tr>
<td>Engineering and Related Technologies</td>
<td>4%</td>
</tr>
<tr>
<td>Food, Hospitality and Personal Services</td>
<td>5%</td>
</tr>
<tr>
<td>Health</td>
<td>3%</td>
</tr>
<tr>
<td>Information Technology</td>
<td>6%</td>
</tr>
<tr>
<td>Management and Commerce</td>
<td>18%</td>
</tr>
<tr>
<td>Mixed Field Programmes</td>
<td>7%</td>
</tr>
<tr>
<td>Natural and Physical Sciences</td>
<td>9%</td>
</tr>
<tr>
<td>Society and Culture</td>
<td>35%</td>
</tr>
</tbody>
</table>

[Source: ENZ definition]

- The most popular fields of study in 2014 were: society and culture (35%), management and commerce (18%), and natural and physical sciences (9%).

### Regional distribution

**Indonesian student enrolments by region, 2014**

![Pie chart showing regional distribution]

- Auckland (57%)
- Manawatu-Wanganui (13%)
- Wellington (11%)
- Other (8%)
- Canterbury (9%)
- Otago (4%)

[Source: ENZ definition]

The three most popular regional destinations for study amongst Indonesian students are: Auckland (57%), Manawatu-Wanganui (13%), and Wellington (11%).

**Student visa numbers**
For the latest information on international student trends, read our Student Visa Dashboards.

The dashboards are available monthly and contain detailed tables and graphs on the numbers of first time and total international student visas.

They can be found on the Education New Zealand website http://enz.govt.nz/markets-research/latest-research.

Competitor analysis
United States

[Image of chart showing international students at U.S. colleges and universities, 2004-2014]

[Source: IIE-Open Doors]

In 2014, 7,920 Indonesian tertiary students studied in the United States, an increase of 3.3% (250) on 2013. Indonesia is the nineteenth leading source country for the United States. There has been slow and steady growth from this market over the last three years.

The majority of Indonesian students studied at the undergraduate level, 68%, while 19% studied at graduate level.

The most popular fields of study for Indonesian students in 2014 were: business/management (30%), engineering (17%), and fine/applied arts (9%).

Indonesia tertiary students contributed USD $246 million (NZD $376 million) to the United States economy.
Total Indonesian student enrolments for 2014 were 17,925, up 5% (817) on 2013. The vocational education (VET) sector saw strong growth, up 15% (912), while the higher education sector was down 3% (-236). Indonesia was the ninth largest source country for Australia.

Since 2002, higher education has declined proportionally in Australia (61% of enrolments in 2002, down to 47% in 2014). In contrast, the VET sector has seen strong growth, with an increase from 18% of enrolments in 2002 to 38% in 2014.
In 2013 there were 1,167 Indonesian students studying in Canada, a 7% (73) increase in student numbers on 2012. Indonesian student numbers were steadily declining between 2004 and 2008, having dropped 31% (-459). Since 2008 the market has seen strong growth.

[Source: CIC Facts and Figures] 4

4 Citizenship and Immigration Canada
Tertiary student mobility

39,098 Indonesian tertiary students studied abroad in 2013, an increase of 9% (3,313) on 2012.

The majority of Indonesian tertiary students choose to study in: Australia (24%), the United States (19%), Malaysia (16%), Egypt (7%), and Japan (6%).

[Source: UNESCO] 6

5 UNESCO - students studying at ISCED levels 5 and 6
Links

Australian Government Department of Education and Training

Institute of International Education - Open Doors

CIC International students by top 50 countries of citizenship, 2004-2013

Glossary/ Definitions

Export Education Levy figures vs. ENZ figures: the Export Education Levy data may vary from ENZ data due to the methodology used to count students.

ENZ figures include full fee-paying, PhD, NZ Aid, exchange, and foreign postgraduate research students, but do not include students enrolled in non-formal courses.

Government funded tertiary providers: this includes universities, ITPs, and government funded (SDR) PTEs.

Levy full fee-paying statistics: includes all full-fee paying students (including non-formal courses), but does not include PhD, NZ Aid, exchange, and foreign postgraduate research students.

Student Mobility numbers: UNESCO counts students studying at ISCED levels 5 and 6. This is equivalent to level 5-7 diplomas through to (and including) bachelors' degrees.

Sector trends: only includes government funded tertiary providers.