

Education New Zealand

Quarterly Report for 1 July to 30 September 2020

Proactive release

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ENZ's Leadership role

International education and its contribution to New Zealand has been significantly changed by the COVID-19 pandemic. Education New Zealand's (ENZ's) role is to help the international education sector to recover and rebuild. We do this by being the government agency that leads the future thinking on New Zealand's international education delivery, while supporting the sector through brand, marketing, business capability and international representation.

In this period of high uncertainty, agencies have a variety of views about the issues and opportunities facing the international education sector and New Zealand. Convening and chairing the Chief Executives' Group enables ENZ to lead the conversation to get buy-in to the strategy for international education by other agencies while ensuring that agencies' concerns and issues are discussed. This group can also shape and steer the sector to ensure that New Zealand will more widely benefit from international education than in the past.

The first Chief Executives' Group meeting was productive with the chief executives committed to ensuring their agencies work together to enable the recovery of the sector. The group has commissioned work around the wider value of the sector and a supporting intelligence group has been established, ensuring improved sharing of data and intelligence to support the rebuild of the international education sector.

Prior to the General Election, ENZ's Board Chair and Deputy Chair met with your office to discuss the critical issues facing New Zealand's international education sector. The Recovery Plan is focused on the need to diversify to new modes of delivery – online, blended and offshore – and to new markets. Some significant issues are emerging, threatening that model. The issues include:

- Sub-sectors (other than the school sub-sector) fear New Zealand is losing the ability to capitalise on the country's strong COVID-19 response. They fear a competitive disadvantage as other countries open their borders or signal strong support for international education or paths to re-entry.
- Decreasing number of people in New Zealand with a valid visa for study as there is usually around 70,000 students in New Zealand at any time. In August 2020¹, there were less than 48,000 people with a valid visa for study and this is forecast to decrease to 40,000 by the end of 2020. By the start of semester one 2021, there are likely to be as few as 25-30,000 students in New Zealand and assuming a very slow build over 2021, there could be around 35,000 students by the end of 2021.
- All sub-sectors will suffer a significant decline in tuition fees. Each sub-sector will be affected in different ways. Private training establishments (PTEs) will have virtually no revenue and schools and institutes of technology and polytechnics (ITPs) will both suffer large losses of revenue.
- There is widespread concern from the sector that the Recovery Plan will not be sufficient or timely enough to address the issues. Many believe the medium-term transformative initiatives will be unrealistic because the sector will have lost scale and momentum and will no longer be globally competitive.
- Some universities, ITPs and PTEs are retrenching and undertaking staff lay-offs which will jeopardise the ability of the sector to recover.

Withheld under s 9(2)(b)(ii) of the Official Information Act 1982

With the large disruption caused by COVID-19 and the above issues, opportunities have also arisen at both an economic and social level. For example, rebuilding a high-quality student attraction market, as well as developing other education products and services, will involve a more thoughtful approach and increased sophistication involving more targeted marketing that will benefit New Zealand in the longer term. In addition to an improved student recruitment approach,

¹ This report includes calendar year and financial year information. A calendar year is shown as a single year, such as 2020, while dates such as 2020/21 refer to a financial year.

the development of a broader delivery model including online, blended and offshore (like the Universities Pathway project) will reduce New Zealand's reliance on student attraction.

ENZ is facing huge change with international education. Much of ENZ's work is focused on reducing the impact of the above issues while preparing the sector to take advantage of the opportunities that arise. As a result, ENZ has been focused on:

- Setting up the Chief Executives' Group and General Managers' Group to drive, enable and influence the delivery of the Government's *Strategic Recovery Plan for International Education*
- Retaining current international students in New Zealand and ensuring any students thinking about staying in New Zealand over the summer period, understand the implications of their decision and have information about what is available over summer.

ENZ has been focused on ensuring that international students in New Zealand have an excellent student experience and will continue to do so to encourage students to stay in New Zealand over the summer period. As international students who leave New Zealand are unable to re-enter for semester 1 2021 study, this has been an important initiative to help maintain international student numbers. ENZ and the sector will know if the desired outcome of retaining students has been successful early in the new year if we see continued enrolment by international students.

ENZ's work will evolve throughout the year to reflect the changing environment and any new opportunities while working to address the issues facing the international education sector. ENZ would like to meet with you to discuss ENZ's quarterly performance, the opportunities and issues facing the sector and how agencies (including ENZ) can speed up implementing the Recovery Plan.

ENZ plans to hold a key stakeholders' workshop in early 2021, either in late January or February, to look at the issues of maintaining the viability of the international education sector and the platform needed to 'build back better' following the pandemic. ENZ invites you to attend and speak at the workshop. Immediately after the workshop, ENZ's Board and management will finalise our plan for our 2021 activities to which we hope you will also be able to contribute to.

Introduction

The report summarises ENZ's performance in delivering its strategic priorities and the outcomes of the Government's Strategic Recovery Plan for International Education (the Recovery Plan).

This quarterly report is assessed against ENZ's *Statement of Intent 2019-2023*, *Statement of Performance Expectations 2020/21*, *ENZ Business Plan 2020/21* and the Interim Letter of Expectations from Minister Hipkins,

To achieve good governance and management of overall effectiveness, these priorities are organised under the following overarching themes and workstreams of the ENZ Business Plan 2020/21:

- Early return of students including student experience
- Innovation including a Pathways project
- International reputation including Brand positioning and protection including PR
- Social licence of international education in New Zealand
- ENZ's capability.

ENZ monitors delivery against ENZ's Business Plan 2020/21 by regularly reviewing progress and management of risk and issues against the projects to anticipate and mitigate emerging risks and issues.

The next quarterly report will include further information of the implementation and delivery of ENZ's strategic initiatives and the implementation of the Recovery Plan to provide assurance for operational stability and effectiveness. The report will outline further impact on ENZ's performance measures for the second quarter of the 2020/21 financial year.

ENZ's Operational update

ENZ is committed to implementing its component of the Recovery Plan through ENZ's Business Plan 2020/21 and convening the Chief Executives' Group to oversee the implementation of the Recovery Plan, along with delivering ENZ's strategic priorities and overall outcome in accordance with the *International Education Strategy 2018-2030*.

Implementation governance and project management is managed within each applicable workstream including detailed workstream level planning and resourcing for delivery to ensure the delivery of outputs, outcomes and key milestones.

ENZ continues to make steady progress against delivering workstream outcomes and project outputs across the workstreams.

Overall management of strategic and high-level implementation risks and issues are discussed under the Risks section to ensure that likely impacts of anticipated changes are managed.

Not all projects have been fully initiated due to prioritisation based on Ministerial expectations; such as the 'Retention of students activity' planned for the summer period, timing of funding and resourcing requirements. We will provide progress updates against those in the next quarterly report.

Recovery Plan Governance and Engagement Workstream

This workstream delivers its outcomes through two key initiatives, Governance and Engagement. Under the Governance initiative the project manages the establishment, monitoring and reporting of the General Managers and Chief Executives' Groups to drive, enable and influence the delivery of the Recovery Plan. The Engagement initiative delivers through the following projects:

- Input into other agencies work to strengthen the system
- Government engagement with NZ Inc
- Sector engagement
- [REDACTED]

[REDACTED]
Withheld under s 9(2)(f)(iv) of the Official Information Act 1982

Key Activities

Highlights over the quarter

ENZ acts as a secretariat for the Chief Executives' Group, convening and chairing the group. The first meeting of the Chief Executives' Group was held in September and its' Terms of Reference agreed.

In parallel ENZ established the General Managers' Group and is overseeing the monitoring and reporting framework. The General Managers' Group met in August and September. Bringing together the work programme and planning for the Chief Executives' Group first meeting were key agenda items.

ENZ, along with other agencies as appropriate, during the July to September period led a series of engagements with sector representatives to introduce and discuss the Recovery Plan. This involved engaging with representatives from the sub-sectors and will be followed by deep dive workshops with sub-sectors in the coming months. Whilst the sector welcomed the plan in general terms, many providers were concerned about short-term survival.

Early Return of Students Workstream

This workstream contributes to delivering the outcomes to ensure that current international students extend their education experience as well as ensuring ENZ's readiness and the ability to capitalise on re-opening of international education markets. The workstream is delivering these achievements through the following initiatives:

- The Retention of existing students in New Zealand including both:
 - Early return of students to New Zealand
 - Retention of students in New Zealand
- The Waiting Room pipeline development
- Student experience.

Key Activities

Highlights over the quarter

Tū Ngā āhi is a domestic programme of activity allowing ENZ and our sector partners to unite behind a collective brand and messaging to communicate to international students in New Zealand that we stand together with them, and that they are welcome in New Zealand. The Tū Ngā āhi programme will be implemented in the next reporting period with a planned launch to coincide with student retention activities.

NauMai NZ, ENZ's platform for international students in New Zealand, has been live for 16 months. Since its launch in May 2019, the platform has had over 207,000 users and over 275,000 sessions. There are over 8,400 students signed up to the NauMai NZ database with work continuing to encourage students to join the platform. The three COVID-19 related pages, developed in March and April 2020, have had over 54,500 views to date.

ENZ is continuing to update and develop new content for the platform and is planning to enhance user experience as well as working to engage students on social media channels. The NauMai NZ WeChat mini-programme was launched in October with a Tencent Live session to promote the programme and the summer in New Zealand 2020 work for international students already in New Zealand being run in the next quarter.

An online programme of events focused on student wellbeing and keeping students connected is being developed for international students in New Zealand and will be started in the next quarter. New pages on NauMai NZ will go live in the next reporting quarter to provide advice and information on options and activities to keep international students in New Zealand engaged and connected over the summer period. Students whose programmes are due to finish this year are also being encouraged to consider further programmes of study in New Zealand.

An ENZ/Immigration New Zealand (INZ) message was sent out via INZ's channels to current student visa holders encouraging the students to visit NauMai NZ to learn about options for summer. A comprehensive communications campaign is being developed to raise awareness of summer options.

The NauMai NZ summer pages are now live with stakeholders submitting their pre-recorded sessions for an online fair hosted by ENZ for students highlighting the options and resources available to students over the summer from SkyKiwi studios in Auckland in the next quarter. Key partners have been invited to participate in the fair, including regional economic development agencies, Asian Family Services, Tourism New Zealand, LinkedIn, the New Zealand Police and the New Zealand International Students' Association.

The International Student Hardship Fund (the Fund) was set up to assist international students who have experienced temporary hardship due to the COVID-19 pandemic. The Fund had \$1 million available to provide grants to education providers, peak bodies or community organisations to support international fee-paying students. The Fund in 2019/20 supported 3,381 international students in hardship by spending \$888,988, with a total underspend of \$111,012 which will be returned to the Export Education Levy. Some students who were in hardship were able to improve their situations without the need for financial support, either by returning to their home countries or finding part-time employment.

Social licence of international education in New Zealand Workstream:

The workstream's aim is to ensure that international education is understood and valued as a key component of New Zealand's rebuild by New Zealanders and a broad range of stakeholders. Another objective is to establish that ENZ is seen as a trusted leader of international education and supported by the sector, government agencies and other stakeholders. The workstream delivers these outcomes with the following initiatives:

- Creating a national conversation on the future state of international education in New Zealand
- Broader sector value (creating broad national recognition of the wider benefits of international education)
- Undertaking research, which includes measuring the social, cultural and economic contribution of international education to New Zealand.

Key Activities

Highlights over the quarter

ENZ is developing a new strategy to create a new narrative for international education that reflects the new operating environment post COVID-19 and to improve people's understanding that international education is not just about people travelling to New Zealand for study. ENZ engaged The Research Agency Ltd (TRA) to source research insights into how aspects of international education do or do not align with New Zealanders' values and beliefs and to understand their current perceptions of international education.

Both qualitative and quantitative research was completed in the quarter which included focus groups from across New Zealand. It found half of respondents were enthusiastic champions for international education. While the remaining respondents had limited awareness of international education, they became strongly supportive when told about the benefits. In addition, two thirds of respondents were positive about international students returning to New Zealand by the end of 2021.

These insights will be used to inform development of a social licence strategy and messaging toolkits for peak bodies and New Zealand education providers. TRA presented interim insights from the qualitative work to the Peak Body Forum, Institutes of Technology and Polytechnics International (ITPI) group and University Communications Directors. Social licence is an area that has been signalled as very important by various peak bodies recently and insights from this work will provide a messaging framework that can be shared with the sector. Initial findings suggest the greatest opportunity to shape the conversation is through socially observable norms.

A range of other activities are underway and resource requirements for the next quarter are being scoped.

International reputation Workstream:

The workstream is focused on achieving objectives to ensure that New Zealand's strong country brand sentiment is leveraged to increase preference for New Zealand education. Work is underway to define and deliver the evolution of the brand over the next 24 months, including extending the brand beyond student recruitment and integrating with our global PR strategy. The workstream achieves the delivery of its objectives through the following initiatives:

- Brand positioning and protection including PR
- Using global initiatives to build and strengthen partnerships and academic reciprocity
- Achieve the strengthening of New Zealand's education brand by leveraging alumni to better use New Zealand's international alumni.

Key Activities

Highlights over the quarter

ENZ started running the current Brand Protect campaign² to reintroduce the New Zealand education brand into several key markets and build equity into ENZ's core brand position "I Am New". The campaign is centred on high-level brand positioning, not student attraction and is intended to reposition the 'Think New' brand for long-term brand building while New Zealand's borders are closed, focusing on building familiarity with the I AM NEW message.

Work is underway to extend this campaign into new markets and the initial campaign results were that it is the most successful brand awareness campaign ENZ has run. The Brand Protect campaign was set out to maintain education brand presence in Brazil, Indonesia and Germany. There were positive early results with just under 30 social million media engagements across the three active countries and an engagement rate of 20-23% which is the highest engagement rate achieved for ENZ's global campaigns.

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The first phase of Brand Protect campaign was completed and the second phase is being scoped with an early-mid October launch.

ENZ is supporting education agents via activities such as the ENZ Recognised Agency (ENZRA) Programme, webinars and funding provided to agents to undertake small scale promotional/awareness raising activities.

As a response to the impacts of COVID-19 ENZ has postponed the annual review and application period for ENZRA from 31 October 2020 to February 2022 (at the earliest). This is to acknowledge there will likely be limits on the number of international students able to enter New Zealand for the foreseeable future and to not disadvantage Recognised Agencies for circumstances beyond their control. All current Recognised Agencies will remain in the ENZRA Programme upon signing an updated participation agreement and undergoing a review of conduct with assistance from INZ. New education agencies will not be able to join the programme at this time.

The AgentLab WeChat mini-programme is currently being developed specifically for China based agents and will be launched in the next quarter.

Innovation Workstream:

The workstream's aim is to support the international education sector to adopt non-traditional approaches to the delivery of international education. The workstream achieves its outcomes through five initiatives.

- Explore, develop new products and services (the new products and services project will be initiated in the next quarter as the contingency fund was approved in October)

² Background on this campaign was included in a fortnightly report, ENZ ref 2021-009.

- Piloting offshore delivery (Pathways Project)
- Exploring online learning (UDLP)
- Repurposing the Prime Minister's Scholarships and;
- Supporting Te Pūkenga.

Key Activities

Highlights over the quarter

ENZ is taking a 'whole of New Zealand approach' to promote education pathways that enable students to begin their study journey to New Zealand from their home country. To achieve this, ENZ is leading the Pathways Project to deliver an initiative to enable students to do one to two years of study in their home country and then enter any of New Zealand's eight universities' Bachelor's or Master's degree programmes.

The Pathways' Project achieved a significant milestone on 27 August by facilitating negotiations with all eight universities agreeing terms with the UK-headquartered University Consortium (NCUK) to promote New Zealand as a destination for students studying pathway programmes in more than 30 countries. ENZ will support the November 2020 global launch of the partnership through marketing, public relations and business development support.

This partnership represents the first phase and in the coming months ENZ is continuing to progress further phases of the Pathway Project, including dedicated New Zealand Study Centres and extending the Study In New Zealand website to promote a broader range of existing institutions. It also includes the partnerships that enable students to start their study in their home country.

To undertake the exploration of online delivery via the Unified Digital Learning Platform (UDLP) project and provide a one-stop shop digital platform, ENZ is planning the UDLP feasibility study and engagement plan and work will be commenced in the next quarter. The contingency funding for this project was approved by joint Ministers in October.

ENZ has initiated the short-term 'Future Focus Programme' (FFP) funded through redirected existing appropriation, directed to sector peak bodies and underpins the transformation of the international education sector to successfully realign their business models and products and also tailor the programme to the needs and interests of each sub-sectors to develop new products, services and modes of delivery to help equip them to rebuild. The funding supports the development of an innovation plan for their sector and to initiate innovation projects that help start to reimagine international education and plan for the future following the COVID-19 crisis.

The FFP is gradually moving into implementation phase. Universities New Zealand and Schools International Education Business Association (SIEBA) have now appointed staff to progress their FFP projects. English New Zealand has contracted a research company to conduct the first phase of its' project and Publisher Association of New Zealand (PANZ) is rolling out its two initial projects relating to research and a digital platform pilot. Other peak bodies are still in the phase of scoping their innovation plans and projects. Implementation is expected to occur over the remainder of this financial year, and into the next.

ENZ continued strong engagements with the emerging Te Pūkenga (formerly known as New Zealand Institute of Skills and Technology). Te Pūkenga International Working Group (IWG) was set up and held its first meeting to propose three different models for international education to Te Pūkenga Council on 28 September. The IWG provides ENZ with an important opportunity to influence thinking towards a high-quality and future focused vocational sector that meets the differing national, regional and international needs for students, government and industry. The IWG comprises several institutes of technology and polytechnics chief executives and international directors, ENZ and Te Pūkenga staff.

ENZ facilitated a brand workshop with domestic marketing managers and ITPI Directors around how the newly launched Te Pūkenga brand needs to adapt in international markets as this is a significant strategic opportunity for ENZ to engage at a formative stage around business model, markets, offshore, online and blended delivery.

Recovery Plan Implementation - Risks and Issues Management

This section describes ENZ's monitoring and reporting mechanism for managing risks and issues to maintain oversight and provide assurance over the initiatives of ENZ's Business Plan 2020/21.

To maintain high level oversight over ENZ's strategic objectives and manage risks and issues effectively, ENZ's strategic risks are regularly received by the Audit and Risk Committee which provides independent assurance related to ENZ's strategic risks. During the quarter, the Chief Executive updated the Committee Chair on the actions being taken to address the key risks facing ENZ due to the impacts of COVID-19 on a fortnightly basis. ENZ's senior leadership team also undertakes monthly risk reporting to ensure the mitigation plans are in place, managed and effective.

Risk management decisions for initiatives under the ENZ's Business Plan 2020/21 are managed within each workstream as the projects routinely identify, assess, manage and review their risks against established project objectives.

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Our organisational development

Building ENZ's capability Workstream:

The workstream delivers its set outcomes through six initiatives and ten projects to ensure that ENZ has the capability, systems and processes to deliver its priorities within our changed operating environment. ENZ is also developing new ways of doing things, with staff adapting to new projects and roles to meet the challenges and take advantage of the opportunities arising.

Successes

Highlights of achievements over the quarter

Ngā Manapou which represents the weaving together of our “Ways of Working” and Nga Mātāpono (principles) was launched after an extensive consultation programme with input from staff. It is now featured in staff development plan templates and in approaches to recruitment.

ENZ also incorporated the Ngā Manapou values to build ENZ's culture to drive leadership and support for priority projects.

The Rautaki Māori pou of fostering capability in te reo me ōna tikanga by all staff to promote te wiki o te reo Māori with speakers engaged to address staff about te Tiriti, tikanga and te reo and co-hosted by the Kaitohu Matua Māori.

ENZ has started the implementation of Healix, the new international safety provider to deliver an emergency all-staff communication channel via SMS as well as real time safety and health alerts globally.

As a response to COVID-19 ENZ's Auckland based staff largely continued working from home, but some staff have started to work from the Auckland office (none have returned to the office full-time). ENZ's offshore staff worldwide also alternate between working from home and in the office with the exception of some who predominantly work from home.

ENZ's New Zealand offices continued to be accessed only by staff, with meetings with external parties being held via Zoom where possible. To better support staff, ENZ's CoVideo information-sharing meetings continued to be held twice weekly with very high staff attendance for these optional meetings.

Following the previous Pulse survey in April, ENZ launched a new pulse survey focusing on staff wellbeing as many staff have only been able to work from home for the last six months and the continuing uncertainty about the international education sector.

ENZ presented the ENZ Business Plan 2020/21 to staff, with staff invited to express interest in participating in the workstreams. Staff were encouraged to get involved and use their involvement in these projects to develop their skills and experience more broadly.

Financial performance to 30 September 2020

STATEMENT OF FINANCIAL PERFORMANCE	For the 3 months to 30 September		
\$000s	Actual 2020/21	Budget 2020/21	Actual 2019/20 ³
Operating Revenue			
Revenue from the Crown - Operating	7,497	7,497	6,883
Revenue from the Crown - EEL	817	817	816
Other revenue	188	44	1,734
Total operating revenue	8,502	8,358	9,433
Scholarship Revenue			
Revenue from the Crown - scholarships	1,006	1,012	1,087
Total scholarship revenue	1,006	1,012	1,087
Operating Expenditure			
Personnel costs	3,326	3,196	3,209
Other expenses	2,343	3,321	6,165
Depreciation & amortisation expenses	69	76	88
Total operating expenditure	5,738	6,93	9,462
Scholarship expenditure			
Scholarship expenses	45	0	(4)
Total scholarship expenditure	45	0	(4)
Net surplus	3,725	2,777	1,062

STATEMENT OF FINANCIAL POSITION	As at 30 September		
\$000s	Actual 2020/21	Budget 2020/21	Actual 2019/20
Assets			
Total current assets	8,659	5,998	6,719
Total non-current assets	533	450	709
Total assets	9,192	6,448	7,428
Liabilities			
Total current liabilities	2,424	4,000	3,702
Total non-current liabilities	230	-	171
Total liabilities	2,654	4,000	3,873
Net assets	6,538	2,448	3,555

For the three months to the end of September 2020, ENZ expenditure is tracking \$1.0 million ahead of the budgeted year-to-date surplus. All year-to-date budget variances are timing related at this stage of the year. Traditional face-to-face engagements and events are restricted in many offshore markets so ENZ has piloted and is now launching various virtual or hybrid events. Digital properties are being further developed to increase engagement with providers, students, agents and other stakeholders. ENZ will continue to closely monitor its financials through a re-forecast on a monthly rolling basis.

³ These are the unaudited financial results for 2019/20. The audited financial results will be provided in ENZ's Annual Report for 2019/20.

ENZ's financial review

In the coming months ENZ will be undertaking a financial review and the analysis of critical success factors with discretionary spend reprioritised to support the implementation of the Recovery Plan.

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ENZ's Impact, Performance and Organisational measures

Impact measures

	Target 2020/21	2018/19 Full Year Result	2019/20 Full Year Result	2020/21 YTD Result	on Track ⁴	Comment
International student perceptions of education quality.	2020: 8.2 out of 10	2019: 7.8 out of 10	2020: 7.8 out of 10		●	The result will be reported in Q4.
The percentage of international students who were satisfied or very satisfied with their overall experience.	2020: Increase	New baseline in 2019/20	88%		*	ENZ plans to run the survey in semester one 2021.
The economic value from New Zealand's international education sector.	2020: Maintain	2018: \$4.94 billion	2019: \$5.23 billion		●	The result will be reported in Q4.
The economic value per international student.	2020: Increase	2018: \$39,000	2019: \$44,951		●	The result will be reported in Q4.
The percentage of international students enrolled to study outside Auckland.	2020: Increase	2018: 44%	2019: 45%		●	The result will be reported in Q4.
The percentage of the international education sector's economic value coming from New Zealand's top two markets.	2020: Decrease	2018: 51.6% of economic value New Zealand	2019: 50.4% of the onshore economic value to New Zealand		●	The result will be reported in Q4.
Awareness of the contribution of international education to New Zealand.	2019/20: Increase	2018/19: 58%	Not surveyed ⁵		●	The result will be reported in Q4.

⁴ Key: ✓ on track to achieve full year target

* target not met

● not measured or not on track to achieve full year target

NA result is not yet available, but will be included in the Annual Report 2019/20

⁵ Due to the significant impact of COVID-19, ENZ did not survey New Zealanders about their perceptions.

Performance measures

The financial and non-financial information set out in our Statement of Performance Expectations 2020/21 (SPE) were developed prior to COVID-19 and have been impacted by the pandemic. The extent of this impact means that some of the measures set out are no longer relevant / unable to be met or measured, or that new measures are required. ENZ plans to provide an amended SPE to you later in 2020/21.

	Target 2020/21	2018/19 Full Year Result	2019/20 Full Year Result	2020/21 YTD Result	On Track ⁶	Comment
Percentage of facilitated customers that agree ENZ's services and support have added value to their organisation.	≥ 75%	93%	Not surveyed ⁷		●	The result will be reported in Q4.
Percentage of Active Visits on ENZ's studyinnewzealand.govt.nz website.	≥ 75%	77%	77%	80%	✓	
Number of registrations to ENZ's Student Membership Programme through studyinnewzealand.govt.nz website.	80-100,000	New measure in 2019/20	93,052	13,792	●	Not on track due to changed focus for this year on retaining students in New Zealand and brand protect activity undertaken to maintain awareness of the brand, rather than calling students to action.
Number of registrations to NauMai NZ.	2,800	New measure in 2019/20	6,263	1,045	✓	
Number of key messages about the benefits to New Zealand from international education delivered by third parties.	100	156	127	15	✗	
Percentage of users satisfied with the information and intelligence provided by ENZ.	≥ 87% of users rate it as good or higher	78% of industry users rated ENZ's information and intelligence as 'good' or higher	Not surveyed ⁸		●	The result will be reported in Q4.

⁶ Key: ✓ on track to achieve full year target

✗ target not met

● not measured or not on track to achieve full year target

⁷ Due to the significant impact of COVID-19 on the international education sector and the cross-agency work to provide communications and support to the international education sector, ENZ did not survey the sector about ENZ's work.

⁸ Due to the significant impact of COVID-19 on the international education sector and the cross-agency work to provide communications and support to the international education sector, ENZ did not survey the sector about ENZ's work.

	Target 2020/21	2018/19 Full Year Result	2019/20 Full Year Result	2020/21 YTD Result	On Track ⁶	Comment
Percentage of Prime Minister's Scholarship recipients who report making five or more professional/business connections during their time on scholarship.	≥ 60%	56%	55%		*	There are no outbound scholarships due to border closures. ENZ does not expect to be able to report on this measure for 2020/21.
Percentage of Prime Minister's Scholarship recipients who report making five or more academic connections during their time on scholarship.	≥ 60%	52%	53%		*	There are no outbound scholarships due to border closures. ENZ does not expect to be able to report on this measure for 2020/21.

Activity indicator

	2020/21 Activity Standard	2018/19 Full Year Result	2019/20 Full Year Result	2021/21 YTD Result	On Track ⁹	Comment
Number of New Zealand International Doctoral Research Scholarships funded.	10-20	27	20	10	✓	There are 10 remaining NZIDRS scholars in New Zealand.

Organisational capability

	2020/21 Target	2018/19 Full Year Result	2019/20 Full Year Result	2021/21 YTD Result	On Track ⁹	Comment
Employee engagement.	Increase	New baseline established	66% favourable		●	This is an annual measure.

⁹ Key: ✓ on track to achieve full year target

* target not met

● not measured or not on track to achieve full year target