
NZ INTERNATIONAL EDUCATION INDUSTRY

STRATEGIC ROADMAP

2015 PROGRESS UPDATE

INTRODUCTION

It's now been just over one year since the launch of the strategic roadmaps for New Zealand's international education industry in August 2014.

The six sector specific roadmaps and one overarching industry roadmap that were launched in 2014 reflect the culmination of nine months of industry effort to map out the 'strategic choices' and 'specific actions' which have been identified by each sector as key enablers of their future success.

The roadmaps themselves were produced through a consultative industry-led process involving an extensive series of sector workshops, innovation cafes, and in-depth interviews with a large number of industry participants and experts.

I am pleased that ENZ has been able to work with each sector over the last 12 months to both prioritise the most important strategic choices for each sector and to support the implementation of a number of key strategic actions.

"The industry roadmaps were always intended to be living documents"

I am also pleased to see the progress that has been made towards achieving a number of government priorities to facilitate future industry growth.

As the industry roadmaps were always intended to be living documents, it is timely to review the progress that has been made towards both industry' and government's 2025 goals over the last year, and to re-examine where industry see now future priorities.

We look forward to working with you over the next year to continue the journey together.



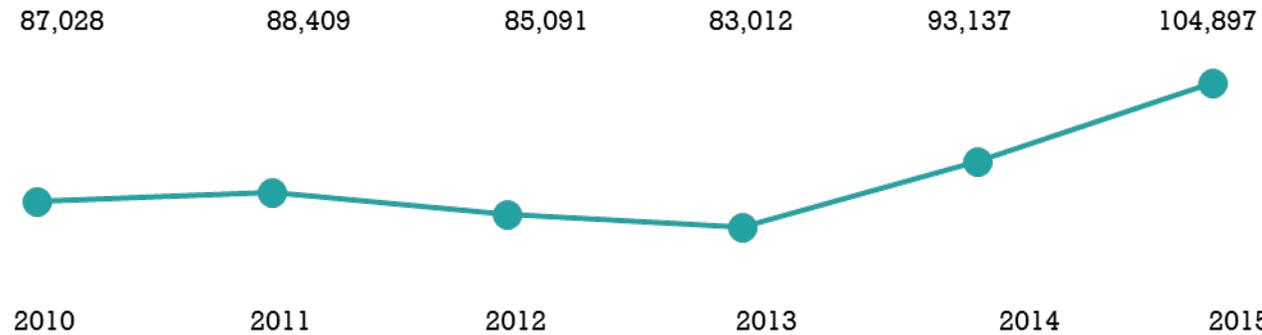
Grant McPherson
Chief Executive
Education New Zealand



WHERE ARE WE ON OUR JOURNEY?



YTD OVERVIEW



Speed of growth to reach \$5b



Accelerated speed



+13% (11,760)

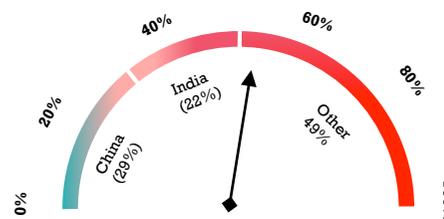
The number of international students



+13% (191m)

Tuition fee income

..but is it the right direction?



51% (53,448)

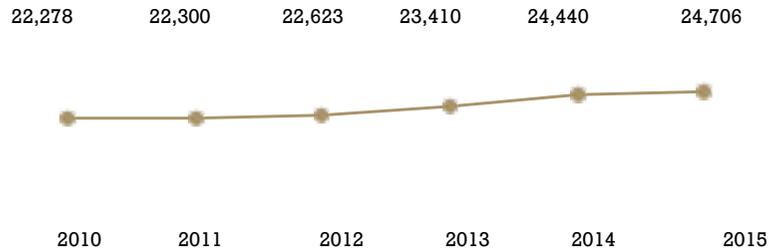
Of international students come from two markets



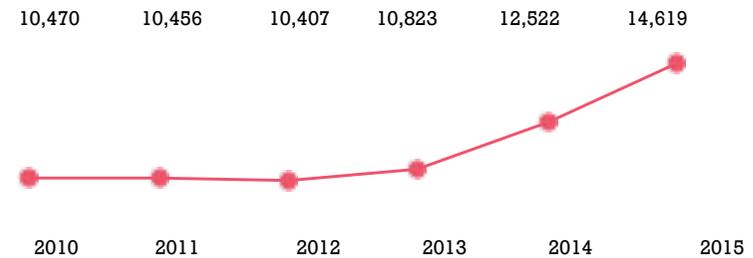
62% (65,293)

Of international students enrol in Auckland

YTD UNIVERSITY



YTD ITP



Positives



+4% (\$13.6m)
Tuition fee income



+11% (328)
Students studying at Masters level

Challenges



+1% (266)
The number of international students



+8% (951)
The only two markets that experienced strong growth

Positives



+31% (\$32m)
Tuition fee income



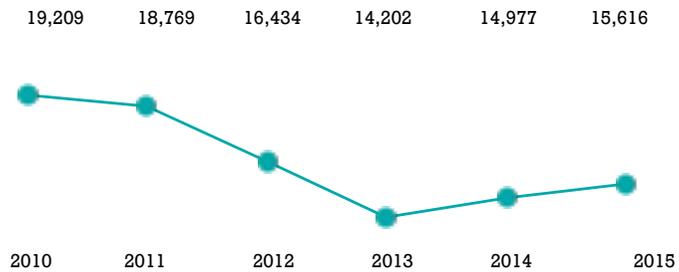
+17% (2,097)
The number of international students

Challenges



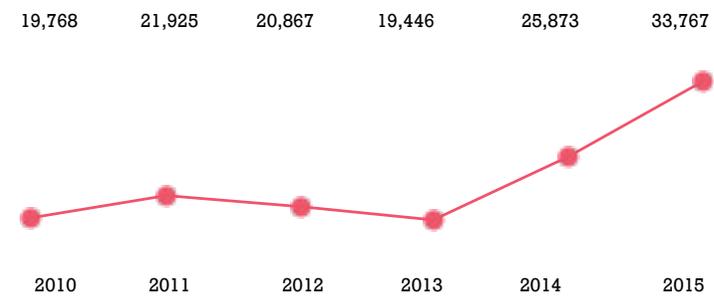
98% (2,072)
Of the growth came from India

YTD ELS



YTD PTES

(excl ELS)



Positives



+11% (\$3.1m)

Tuition fee income

Challenges



+70% (10,916)

Of students enrol in Auckland



+4% (639)

The number of international students

Positives



+22% (\$35m)

Tuition fee income

Challenges



66% (5,650)

Of the growth came from India

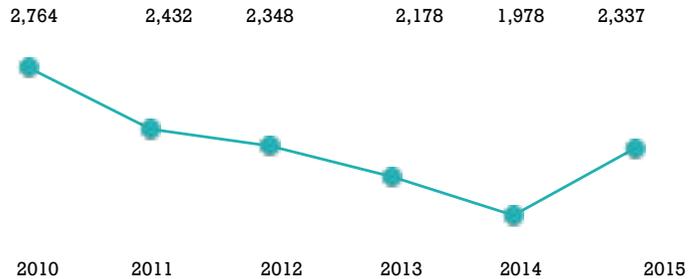


+21% (8,533)

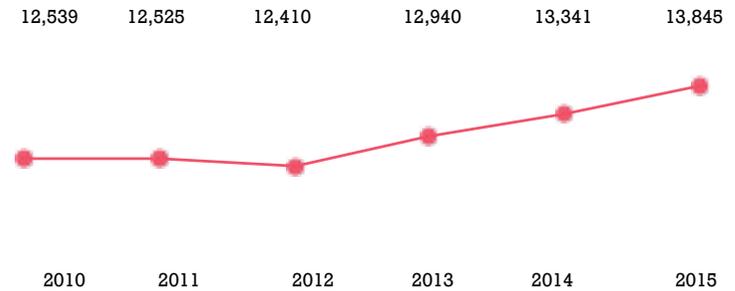
The number of international students

YTD PRIMARY SCHOOLS

Includes Intermediates



YTD SECONDARY SCHOOLS



Positives



+6% (\$475k)
Tuition fee income



+18% (359)
The number of international students

Challenges



+78% (308)
The only market to experience strong growth



91% (326)
Of international students enrol in Auckland

Positives



+9% (\$7.1m)
Tuition fee income



+4% (504)
The number of international students

Challenges



112% (577)
Of international students enrol in Auckland. Declines in other region offset growth

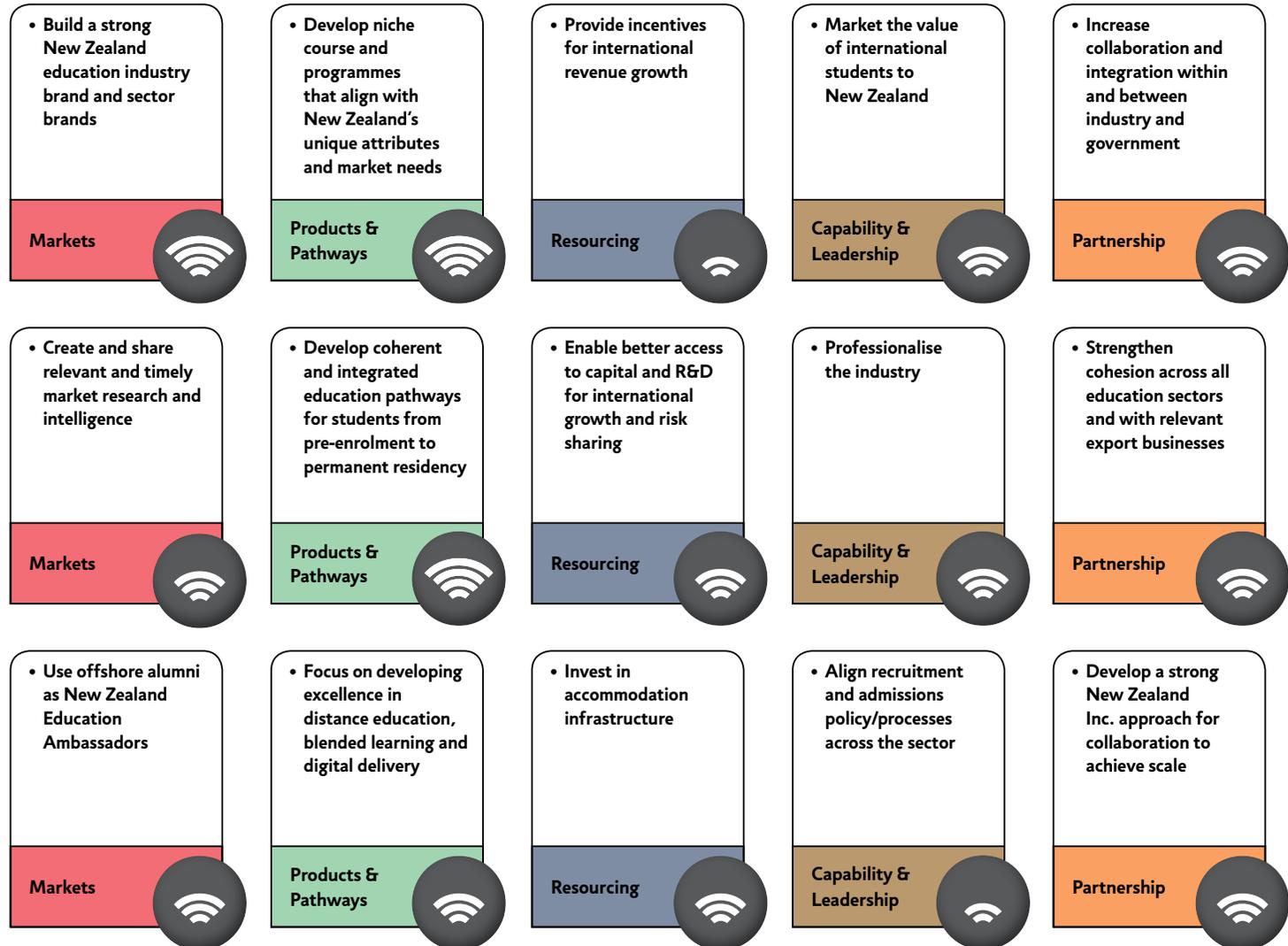


Strong growth from China (↑23%, 931) has been offset by declines by traditional markets incl' Brazil (↓45%, -286) and Germany (↓7%, 111).

ROADMAP PROGRESS: INDUSTRY OVERVIEW

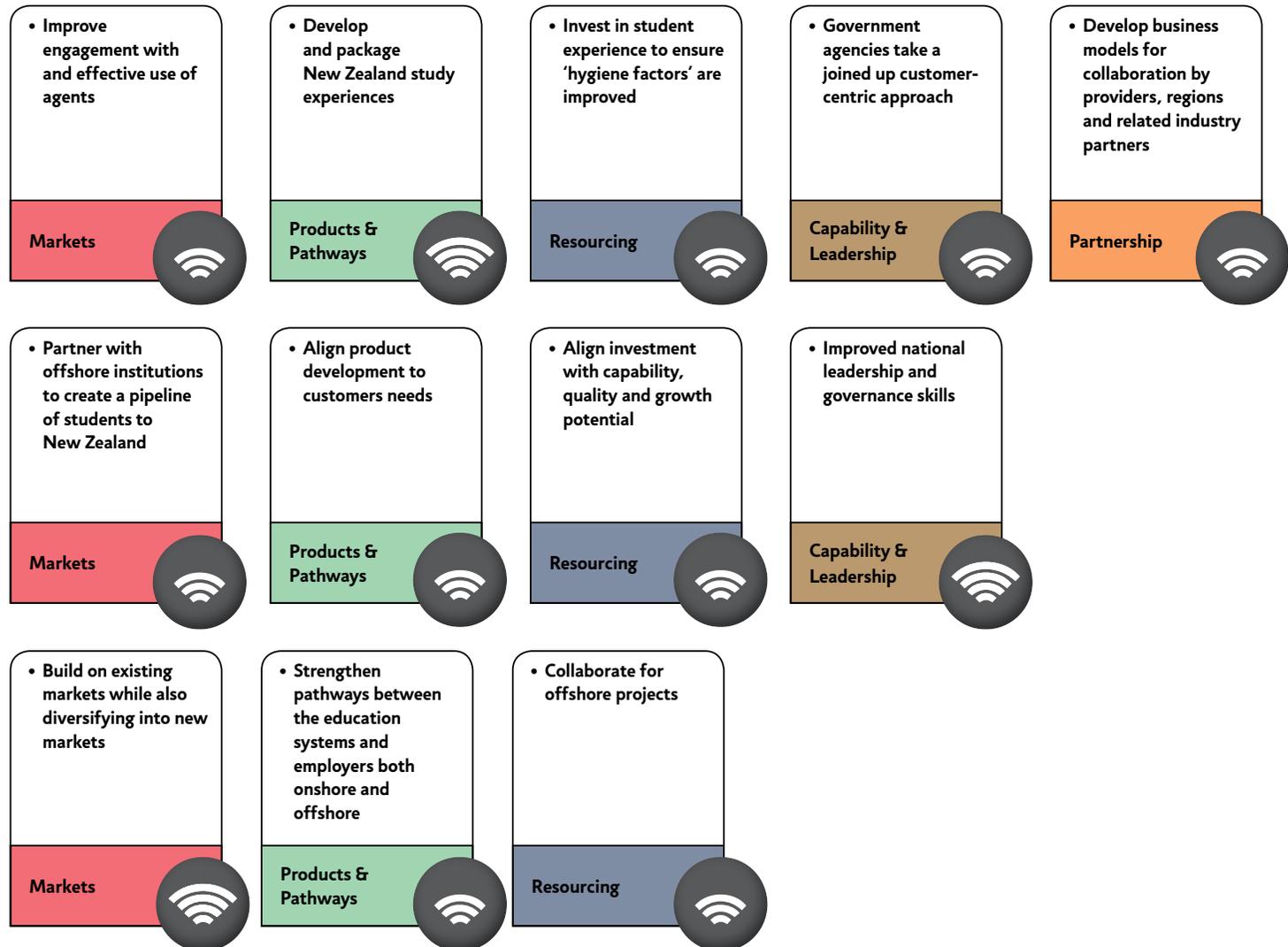


PROGRESS OVERVIEW: INDUSTRY



- Good Progress
- Some Progress
- Yet to Progress

PROGRESS OVERVIEW: INDUSTRY



- Good Progress
- Some Progress
- Yet to Progress

SECTOR ROADMAP PRIORITIES 2014/15

University sector priorities:

1. University sector story development
2. Increase collaboration with government
3. Market research and intelligence

English language sector priorities:

1. Financial benchmarking for sector
2. Development of priority and emerging markets
3. New product development

School sector priorities:

1. Establishment of SIEBA
2. School sector story development
3. Collaborative shared services models

ITP sector priorities:

1. PAVE sector story development

PTE sector priorities:

1. Lift capability of individual providers
2. Build new sector collaborations for offshore delivery
3. Ensure ENZ, INZ and NZQA are aligned on growth markets

Educational services and products sector priorities:

1. Better sector coordination and representation
2. Develop more digital channels and blended delivery
3. Develop and grow industry clusters

OVERVIEW — GOOD PROGRESS



OVERVIEW — GOOD PROGRESS

- Build on existing markets while also diversifying into new markets

Markets



- > Extensive market evaluation process undertaken
- > Four market categories identified (Mature, Rebalance, Promote, Explore)
- > 16 markets identified for diversification and future potential
- > Progress in three explore markets:
 - > ENZ presence establish in Colombia
 - > Philippines: student fairs plus Ministerial visit
 - > Pakistan: industry mission to Pakistan, Pakistani Vice-Chancellors' visit to NZ
- > Greater focus on growing volume in promote markets
- > Trialling strategic education engagement in Viet Nam with universities to drive two-way growth
- > Prime Minister's Scholarships for Latin America announced

ENZ MARKET PRIORITISATION

Promote markets

- > Brazil
- > Indonesia
- > Japan
- > Saudi Arabia
- > Thailand
- > United States
- > Viet Nam

Explore markets

- > Colombia
- > Pakistan
- > Philippines

Rebalance markets

- > China
- > India

Mature markets

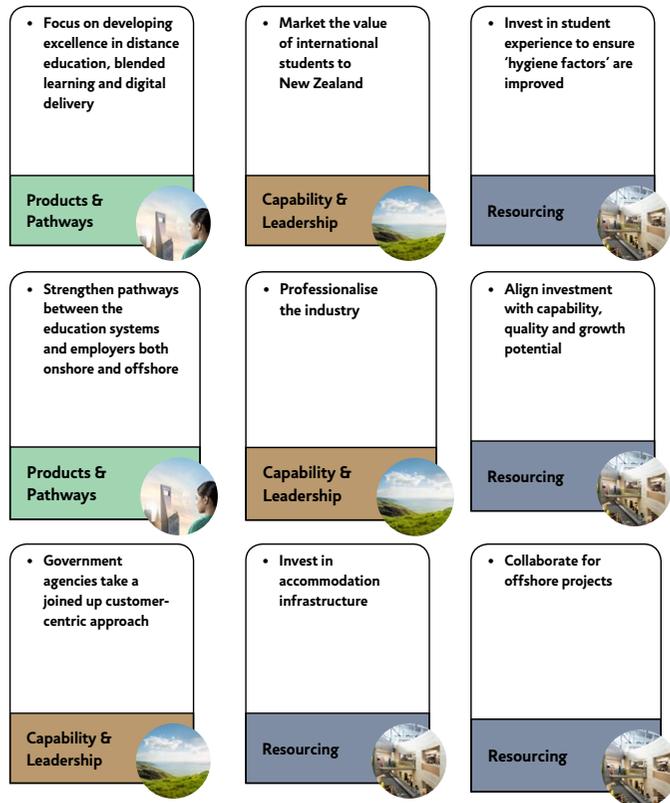
- > Chile
- > Germany
- > Malaysia
- > South Korea

OVERVIEW – SOME PROGRESS



- Collaborative sector story developments (university, school, PAVE) to sit underneath the New Zealand Story and New Zealand Education Story
- Dedicated sector landing pages (for universities, ITPs etc), subject landing pages (eg. engineering), full translation into Chinese, Vietnamese and Thai for studyinnewzealand.com website
- Development of framework to identify internationalisation opportunities for collaborative investment (UNZ)
- Market research and intelligence – feasibility studies into taught Masters (IEGF, UoA); research on India and Brazil to inform UNZ engagement strategies (for UNZ), ISB surveys, expansion of TNS brand surveys to major markets, TNS regional survey; monthly visa dashboard
- Education New Zealand Recognised Agent programme (ENZRA) independently reviewed
- ENZ partnership with KEA to develop effective alumni channels
- Alumni voices project and ASEAN Student Voices forum gather insights and perspectives
- Otago University, Victoria University of Wellington and Waikato University collaborative development of a Malaysia based NZ-Uni foundation programme in conjunction with Kolej Yayasan Saad International College (KYSIC)

OVERVIEW – SOME PROGRESS



- > Accommodation –
 - > The University of Canterbury opened two new student accommodation villages, with 140 beds in total
 - > The University of Auckland opened a 433-bed accommodation block at Carlaw Park (and started a second stage)
 - > Massey University opened a 292-bed student accommodation block at Albany
 - > Victoria University completed its 11th hall of residence, Katharine Jermyn Hall, which will house 390 students.
- > Job Ready Programme launched in Dunedin
- > Regional Partnership Programme expanded to include Hawkes Bay, Dunedin, Queenstown Lakes, Nelson
- > International Education Senior Officials Group (IESOG): progress on pathways through INZ dual visa pilot
- > ENZ speaking programme launched to reach new business, local government and other non-education audiences
- > Increased regional media engagement to raise awareness of international education in regional communities
- > India public relations campaign received top honours at the prestigious PR Week Awards Asia 2015 with a Silver award in the Public Affairs Campaign of the Year category and a Bronze award in the Public Sector Campaign of the Year category, for the same campaign.

ROADMAP PROGRESS: SECTORS



PROGRESS OVERVIEW: UNIVERSITY SECTOR

- Develop a New Zealand universities' story to promote the main benefits of our system

Markets



- Use offshore alumni as New Zealand Education Ambassadors

Markets



- Enable better access to capital and R&D for international growth and risk sharing

Resourcing



- Collaborate for offshore projects

Resourcing



- Market the value of international students to New Zealanders

Capability & Leadership



- Optimise recruitment and admissions policy / processes across the sector

Capability & Leadership



- Increase collaboration and integration within and between industry and government

Partnership



- Create and share relevant and timely market research and intelligence

Markets



UNIVERSITY SECTOR ROADMAP PROGRESS

- > Development and implementation of a UNZ International Education Roadmaps Implementation Strategy
- > Collaboration on development of the university story (completion expected early 2016)
- > Development of university and subject pages (engineering) for Always On marketing campaign and studyinnewzealand.com.
- > Closer links between institutional digital marketing managers and ENZ including on campaigns like Go Overseas study abroad, ASEAN interns, 'A Day in the Life' and 'Share NZ with a Friend'
- > University Alumni Directors group established and connected to Kea alumni project and Alumni Voices project
- > Over \$470,000 IEGF co-invested in nine university projects
- > Closer UNZ collaboration with ENZ and INZ including on: immigration settings; market prioritisation; Ministerial visits and offshore missions to Latin America, Viet Nam, China and Pakistan; government-to-government processes such as the Malaysia-NZ Joint Working Group; and, inward visits eg. Morocco, Pakistan
- > University collaboration on development of foundation programmes in Malaysia and AUT/VUW designated leads for Latin America engagement
- > Bringing NARIC training sessions to NZ; ENZ-tertiary pilot to optimise conversion of leads to enrolment
- > Launch of Victoria University of Wellington postgraduate programmes in international education
- > Suite of ENZ market research provided, including on India, Brazil, International Student Barometer, taught masters etc.
- > Massey University Worldwide launched at Go Global conference.

PROGRESS OVERVIEW: PTE SECTOR

- Build on existing markets while also diversifying into new markets

Markets



- Make it easy for students to apply and enrol – a seamless experience

Markets



- Develop the full potential of personal relationships with our students, families and alumni

Markets



- Develop niche / boutique programmes aligned to NZ Inc. export priorities and national strengths

Products & Pathways



- Support a NZ Inc. approach, with clusters of PTEs, other providers and export businesses

Resourcing



- Ensure that entrepreneurial role models are supported to provide sector leadership

Capability & Leadership



- Develop a stronger NZ Inc. approach for collaboration to achieve scale

Partnership



PTE SECTOR ROADMAP PROGRESS

- > New Zealand Myanmar Training Organisation vocational training collaboration established and market scoping visit made to Myanmar
- > Agri vocational training collaboration established and market scoping visit made to Chile and Colombia
- > New secondary and tertiary partnership relationships developed through the Auckland Futures industry leadership group
- > PTE capability building and international market diversification briefings delivered at ITENZ conference and regional roadshows
- > INAKL international student welcomes, networking events and employment pathway briefings for PTE students piloted in partnership with ATEED, Auckland Chamber of Commerce and Immigration New Zealand
- > PTE i-Graduate international student satisfaction survey completed and insights shared through dedicated briefing sessions
- > PTE forums with NZQA, INZ and ENZ held with PTE peak body leaders to capture international growth opportunities and issues

PROGRESS OVERVIEW: ITP SECTOR

- Develop a NZ VET story to promote the strengths of our system

Markets



- Use offshore alumni as New Zealand education ambassadors

Markets



- Increase the value of our graduates by adopting and embedding technology and applied science from industry

Products & Pathways



- Ensure that the VET sector has an effective and cohesive peak body

Capability & Leadership



- Work with employers to ensure work readiness and employability of graduates

Products & Pathways



- Develop integrated pathways for vocational students though to priority sectors of the New Zealand economy

Partnership



- Enable better access to capital and R&D for international growth and risk sharing

Resourcing



ITP SECTOR ROADMAP PROGRESS

- > Professional and Vocational Education (PAVE) sector story launched at NZIEC 2015
- > The INZ dual visa pilot targets pathways from levels 6/7 to postgraduate study
- > ITPs supported to win offshore delivery opportunities
- > ENZ support for an ITP consortium to leverage alumni stories to position themselves in the German market
- > ITO and ITP sectors collaborate to establish an in-country resource in Middle East and North African markets
- > ENZ support for the industry through the Sino-NZ project to develop NZ model vocational programmes in Chinese institutions
- > ITPs supported to enter North America market through NAFSA
- > Establishment funding for the ITP India Consortium to present the TVET proposition in India
- > Support for the NZED (ITP India) Consortium to prepare a bid for the Indian state and central governments to pilot the trades academy model in India
- > Open Polytechnic's iQualify platform launched

PROGRESS OVERVIEW: SCHOOL SECTOR

- Develop and promote pathways that include New Zealand schools

Products & Pathways



- Develop and position NCEA as an international qualification

Products & Pathways



- Increase the ability of schools to coordinate change and drive quality

Capability & Leadership



- Increase business capability, professionalism and succession planning within the school sector and Government

Capability & Leadership



- Build on existing markets while also diversifying into new markets

Markets



- Strengthen the position of New Zealand Schools as a quality brand

Markets



- Develop business models for collaboration by schools, regions and related industry partners

Partnership



SCHOOL SECTOR ROADMAP PROGRESS

- > Collaborative shared services models piloted
- > IEGF school cluster recipients to Mexico, Bolivia and Colombia
- > IEGF Catholic school cluster to Brazil
- > Cross sector collaboration: Thai teacher / student English language and school package developed
- > Offshore pathway provision into New Zealand schools developed
- > Scoping of services to drive quality improvement
- > Development of a school sector story and associated marketing collateral
- > Developing awareness and a consistency to products and pricing: niche/group visits
- > Fifty school partnerships supported through the New Zealand-China Sister Schools Fund

Schools International Education Business Association

- > SIEBA established as peak body for schools active in international education
- > Engaging with SIEBA to identify and plan school sector & government priorities to be addressed
- > Raising quality and professionalism through SEIBA by developing high quality templates for the school sector
- > Utilisation of SIEBA as the mandated school sector voice on emerging issues and policy changes

PROGRESS OVERVIEW: ENGLISH LANGUAGE SECTOR

- Build on existing markets while developing new markets

Markets



- Align visa settings to facilitate product development and marketing

Products & Pathways



- Consolidate position as a destination-based language travel market

Products & Pathways



- Enhance student experience

Products & Pathways



- Develop strategic partnership with tourism industry

Partnership



- Align regulatory processes with the commercial requirements of the sector

Partnership



- Increase collaboration and integration within and between industry and government

Partnership



ENGLISH LANGUAGE SECTOR ROADMAP PROGRESS

- > In 2014 the English language sector reversed over five years of enrolment declines
- > English NZ strategic agreement with ENZ to support entry into Western Europe, Southeast Asia and South America
- > Financial benchmarking project has provided the sector with rich data to manage performance and provide recommendations for new entrants to the industry
- > ENZ support for bloggers from Colombia and Japan to visit NZ
- > Introduction of work rights for 14+ weeks' study responds to market demand and aids development of South America market
- > Dual visa pilot to encourage packaging of programmes with tertiary providers promotes development of pathways
- > Game On English programme developed to enhance student experience and encourage collaboration with high-value tourism providers
- > Game On English pilot programme extended into five regions. New partnerships formed with rugby unions, English New Zealand members and university language schools
- > Increased engagement/communication between ELS and ENZ regarding regulatory and policy issues

PROGRESS OVERVIEW: EDUCATIONAL SERVICES SECTOR

- Better sector coordination and representation

Capability & Leadership



- Create and share relevant and timely market research and intelligence

Markets



- Focus on niche sectors where New Zealand has competitive advantage

Products & Pathways



- Focus on developing and growing industry clusters

Resourcing



- Develop more digital channels and blended delivery

Products & Pathways



- Develop public / private partnerships

Partnership



- Enable better access to capital and R&D for international growth and risk sharing

Resourcing



EDUCATIONAL SERVICES SECTOR ROADMAP PROGRESS

- > Third EdTech for Export (et4e) conference held to encourage networking, collaboration and sector development
- > EdTechNZ community established and series of networking events launched; over 200 EdTech institutions added to ENZ database
- > New institutional partnerships developed for offshore delivery and as channels to bring students onshore
- > EdTech market research for Education Publishers purchased and commissioned research on South Korea, Hong Kong and Taiwanese markets
- > Support and market access funds provided through PANZ to help education publishers leverage NZ guest of honour status at Taipei International Book Fair. Funding also facilitates industry mentoring & delegation visits to South Korea and Hong Kong and to Frankfurt Fairs.
- > IEGF co-investment of over \$360,000 in sector helps develop and market niche products such as Bud-E Digital's digital and print early reading programme to Asia and Biozone's biology texts to the US
- > Establishment of G2G Partnership Office and agency-industry / industry-institution partnerships for international work.

ThinkNew[®]



**NEW ZEALAND
EDUCATION**

studyinnewzealand.com
enz.govt.nz