



Education New Zealand Briefing

Title: Education New Zealand release of The Insight Story

Date: 2 June 2021

Priority: Low

Security level: Unclassified

ENZ ID no: 2021-212

Action sought

Addressee	Action sought	Deadline
Minister of Education	Agree to share The Insight Story with other Ministers associated with international education.	9 June 2021

Note that The Insight Story will be distributed to the international education industry.

Agree that this briefing will be proactively released as per your expectation that information be released as soon as possible. Any information which may need to be withheld will be done so in line with the provisions of the Official Information Act 1982.

Contact for telephone discussion (if required)

Name	Position	Cellphone	1 st contact
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Fiona Cameron	Acting Chief Executive	027 2035 905	

The following departments/agencies have seen this report

MoE
 NZQA
 MBIE
 MFaT
 TEC
 Other

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Recommendations

Education New Zealand recommends that you

- a. **Agree** to share The Insight Story with other Ministers associated with international education

Agree Not agree

- b. **Note** that The Insight Story will be distributed to the international education industry

Noted

- c. **Agree** that this briefing will be proactively released as per your expectation that information be released as soon as possible. Any information which may need to be withheld will be done so in line with the provisions of the Official Information Act 1982

Agree Not agree



Fiona Cameron
Acting Chief Executive
Education New Zealand



Hon Chris Hipkins
Minister of Education

9 / 6 /2021

Purpose

1. Education New Zealand (ENZ) advises that it will shortly distribute The Insight Story, its new data-based snapshot of the international education sector, to New Zealand's international education sector. This report is provided to you as an attachment for your information.

The Insight Story

2. ENZ has developed The Insight Story as a regular publication for the international education sector. It aims to provide data and analysis to the international education sector in a timely manner and with value-added insights that the sector can use to monitor performance and inform strategic decisions.
3. The June 2021 Insight Story is the second edition of the new publication. The first was published in February 2021 (ENZ briefing 2021-107 refers).
4. The Insight Story utilises data from the following sources:
 - a) Enrolment data produced by ENZ (2013-2020)
 - b) Immigration New Zealand student visa data as at 27 April 2021
 - c) Transitions data from the Tertiary Education Commission
 - d) Agent survey – run by ENZ
 - e) Student demand – derived from ENZ website traffic and engagement
 - f) Social Licence qualitative research data undertaken in 2020
 - g) New Zealand public perceptions data from social listening, gathered by Text Ferret using publicly available data from 2017-2021
 - h) Learners' priorities, using QS sustainability in Higher Education report
 - i) Chatbot data derived from ENZ sources
 - j) School survey for SIEBA gathered by Edified Education, and
 - k) Students working while studying data gathered by Universities New Zealand using the Integrated Data Infrastructure (IDI).

Key findings from the June 2021 Insight Story

5. The June 2021 Insight Story provides analysis and insight over both the short term (i.e. directly impacted by Covid-19) and the longer term (trends from 2013 until now, including in relation to the International Education Strategy).
6. Short-term findings include:
 - a) As at 27 April 2021, there were 25,523 students in New Zealand with valid onshore student visas.
 - b) The total number of international student tertiary enrolments decreased by 16% from 2019 to 2020, largely driven by a 22% decrease in international students who studied in New Zealand.
 - c) The number of international students enrolled with New Zealand institutions but studying offshore increased significantly in 2020, up 145%. This was largely driven by university enrolments, up 238%.
 - d) In 2020, nearly 8 in 10 international students who studied offshore with New Zealand institutions were from China. Restrictions on entering New Zealand from China put in

place in early February 2020 is likely to have driven this increase in offshore enrolments by students in China.

7. Longer-term analysis (trends over time and performance against the International Education Strategy):
 - a) The proportion of tertiary international students studying outside Auckland continued to grow, with 55% studying outside Auckland in 2020 compared with 51% in 2019 and 46% in 2018. Please note that this considers tertiary students only (the February 2021 Insight Story referred to overall enrolments), as we do not yet have finalised full year data for the whole international education sector.
 - b) Student demand on ENZ's Study in New Zealand platform remains consistent, with the website recording an average of 145,986 visitors per month over the last 18 months. In the February 2021 Insight Story we noted that 1.2 million users had visited the website over a 12 month period and that number has now extended to 1.75 million users over an 18 month period.

Next steps

8. The Insight Story will be distributed to an ENZ database of contacts within the international education sector in New Zealand. There are approximately 25,000 contacts within this database.
9. The Insight Story will be available via MaiENZ and Intellilab, two registration-based digital services hosted by ENZ for education providers and others involved in the sector. Intellilab is available only to ENZ Recognised Education Agents, New Zealand education providers, New Zealand government agencies and key media contacts.
10. We will seek feedback from the sector on The Insight Story to ensure it is an accurate, timely and relevant source of data, analysis and insight into the sector's performance.
11. ENZ can provide key and reactive messages to your office.
12. Subject to your review, we propose to release this edition of The Insight Story on Thursday 10 June 2021.
13. The Insight Story may be of interest to other Ministers whose portfolios touch on international education. ENZ suggests that you share The Insight Story with those Ministers for information.