

Education New Zealand Briefing

Title: Education New Zealand release of The Insight Story

Date: 3 February 2021

Priority: Low

Security level: Unclassified

ENZ ID no: 2021-104

Action sought

Addressee	Action sought	Deadline
Minister of Education	<p>Agree to share The Insight Story with other Ministers associated with international education.</p> <p>Note that The Insight Story will be distributed to the international education industry.</p> <p>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.</p>	

Contact for telephone discussion (if required)

Name	Position	Cellphone	1 st contact
Angela Meredith	Accountability Manager	021 818 905	x
Grant McPherson	Chief Executive	021 665 300	

The following departments/agencies have seen this report

- MoE
 NZQA
 MBIE
 MFaT
 TEC
 Other: Immigration New Zealand

Comments

Education New Zealand Briefing

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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**



Grant McPherson
Chief Executive
Education New Zealand



Hon Chris Hipkins
Minister of Education
15 / 03 / 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 new quarterly 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 January 2021 Insight Story is the first edition of the new publication.
4. The Insight Story utilises data from the following sources:
 - a) Enrolment data produced by ENZ (2013-2019)
 - b) Immigration New Zealand student visa data as at 18 January 2021
 - c) 2019 school leaver transition data sourced through the Tertiary Education Commission
 - d) Social Licence qualitative research data undertaken in 2020
 - e) NZ Story, perception research undertaken in 2020
 - f) Education: Fast Forward to the Future, Citibank report.

Key findings from the January 2021 Insight Story

5. The January 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 (directly impacted by Covid-19):
 - a) Around 20,500 valid student visas are due to expire between 18 January and March 2021. Assuming student behaviour remains consistent with previous years¹, we expect 30-40 per cent of those students to get new visas so they can further their study or take advantage of post-study work opportunities.
 - b) There are approximately 39,000 international fee paying students on valid visas to study in New Zealand as of 18 January 2021. There have been several thousand new first time student visa holders since the closure of the borders in March 2020. These new students are non-citizens who were already in New Zealand and have chosen to remain here and study.
 - c) There continue to be high levels of interest in New Zealand as a place to study. More than 1.2 million users visited our Study in New Zealand website in 2020, with a total of 12,000 new registrations. This is despite all paid media campaigns being halted in

¹ Despite Covid-19, anecdotal feedback from the sector indicates that some sub-sectors are seeing a higher level of interest in continuing study while others are seeing lower levels, and on balance, the expected percentage of new visas is likely to be in line with previous years.

early 2020, which suggests organic, enduring interest in New Zealand as a study destination.

7. Longer-term analysis (trends over time and performance against the International Education Strategy):
 - a) Master's degrees have increased by 75 per cent since 2016, from 4,500 to nearly 8,000 in 2019. This is the largest increase of any qualification, followed by bachelor's and doctoral degrees.
 - b) The number of international students studying outside Auckland continued to grow, with 45 per cent of international students outside Auckland in 2019 compared with 42 per cent in 2018, 40 per cent in 2017 and 37 per cent in 2016.
 - c) In 2019, 34 per cent of international Year 13 school leavers transitioned to tertiary study within New Zealand (1,317 students). Of these, 86 per cent enrolled in a university, and 9 per cent enrolled in an Institute of Technology or Polytechnic.
 - d) This transition means that 32 per cent of international students who took a level 1, 2 or 3 qualification, whether NCEA or a different qualification, transitioned to the tertiary sector.
 - e) The majority of the Year 13 students transitioning to tertiary study (407 students or 31 per cent) have enrolled in a Management and Commerce course, followed by Natural and physical science (260 students or 20 per cent), or Society and Culture (209 students or 16 per cent).

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 has provided key and reactive messages to your office.
12. 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.