

EDUCATION NEW ZEALAND – PHILIPPINES UPDATE



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WHAT HAVE WE LEARNT?

Key market and audience insights for improving performance

Pushing Quality: The market remains dominated by the PTE sector with 70% market share of students to New Zealand in 2016/17. Growth to date has been dominated by work and residency drivers. To increase the quality and value of students we receive from the Philippines the large majority of ENZ's activity will be targeted to L7+.

School system alignment: The Philippines K-12 education reform now brings the Philippine primary and secondary education systems into alignment with international norms, potentially increasing Filipino students' international mobility.

Student Mobility: With a median age of just over 23 years and one of the fastest-growing Asian economies in recent years, the Philippines is predicted to be a major source of international students by 2035. Filipino students have been increasingly outward focused since the start of the new millennium. According to the most recent UNESCO Institute for Statistics data available, approximately 12,000 students from the Philippines studied at foreign institutions in 2013, almost double the figure for 2002. Most of those students are self-funded.

Institutional partnerships - Explore the potential for building institutional partnerships with high schools, international schools and tertiary institutions in Manila that align with New Zealand's capability and offering.

The #1 barrier to us achieving our growth targets

To many Filipinos, education in New Zealand is perceived as a migration pathway and it is also marketed this way

THREE YEAR PLAN

Our Key issue is to reduce the market's reliance on immigration settings and residence pathways by establishing New Zealand's reputation as a world-class education destination to attract high value students

Our 'By 2020' Goals:

- Increase the student value by 50%
- Increase the number of University students from 142 to 350

Key Strategies for delivering on the opportunity

- Industry Engagement: Work alongside key sector partners to build market engagement
- K-12 Focus: Leverage NZ Inc. presence to develop networks and partnerships with local schools and tertiary institutions

PHILIPPINES ACTIVITY PLAN - 2018

Our 2018 Goals:

- Increase the number of L7+ students by 250
- Increase the average student value by 5%

Student Attraction Engine

- Digital Marketing
- Agent Seminars: Manila (20 March) and Cebu (19 September)
- Public Relations
- Agent Activity Fund: NZD 10,000 (September)
- Content Development
- School Roadshows (September/October)

NEW ENZRA PROGRAMME



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WHAT IS THE INTENT OF ENZ'S ENGAGEMENT WITH AGENTS?

“To contribute to the attraction of high-value students, and to enhance the student experience, by providing increased and sustained support to quality education agents who are promoting and marketing New Zealand as an international study destination.”

THE NEW ENZRA PROGRAMME

INTRODUCTION

- The ENZRA programme requires agents meeting three core tenets to gain or retain Recognised Agents status: points, conduct, and training
- The programme is designed to be transparent to agents and other stakeholders, have flexibility, and be simple to administer with few additional expectations on in-market staff
- It is also devised to incentivise agents to consider ENZ's core objectives regarding “value over volume”, and regional diversification
- It is not intended that it will force education agents to fundamentally change their business practices
- The programme ensures the list of Recognised Agents on the *Study in New Zealand* website remains relevant and up-to-date.

THREE CORE TENETS

ADMINISTRATION

It is intended that the annual review period for ENZRA will be from 1 July to 30 June each year.

Gaining, retaining, or losing Recognised Agent status

Immediately after the first annual review period of 30 June 2019, it is proposed that agents are able to apply to become, or renew, their Recognised Agent status for the succeeding year if they believe they have met all three core requirements.

In addition, current Recognised Agents will be removed from the programme at this time if they have been unable to meet any of the core requirements.

Review of current Recognised Agent cohort

Noting that the proposed points system would mean that the list of current Recognised Agents would not change until July 2019, a review of the Recognised Agents will occur before the implementation of the new ENZRA programme. This is intended to insure the agents listed on the *Study in New Zealand* website is up to date, and have demonstrated an on-going commitment to the New Zealand export education industry.

It is proposed that Recognised Agents who have not demonstrated the ability to meet the agreed target for their country would be removed from the programme on 30 June 2018.

Conversely, agents who are currently not Recognised Agents, but have demonstrated that they would meet their proposed country target would be recognised on 30 June 2018, and advised that in order to retain their status, they would need to continue to meet the points target.

THREE CORE TENETS

POINTS

A 'points' based earning system will be introduced in order to both measure agent output, and better align agent behaviour with ENZ's strategic objectives.

Agents will earn points for every successful placement of a student at a New Zealand education provider. Points earned vary depending on the quality of provider, and the student's course and location of study. Agents will have a points target they will need to meet each year, this will vary from country to country.

The benefits of the points earning system are:

- Its agility, allowing ENZ to amend points allocation as necessary depending on particular ENZ initiatives or projects
- It is transparent, allowing agents to track their own progress against targets throughout the year with relatively minimal administrative oversight by ENZ
- It relies on data that is already generated by Immigration New Zealand
- It provides a clear and straight-forward mechanism for agents to become Recognised by giving them a target to work towards
- It allows ENZ to continue to have Recognised Agents in non-focus countries whilst still ensuring some form of quality control
- It can easily identify agents who are performing exceptionally well, allowing ENZ to highlight and reward that behavior.

THREE CORE TENETS

CONDUCT

ENZ will have high expectations regarding the behaviour and conduct of Recognised Agents:

- In the first instance, ENZ will expect that the primary concern of a Recognised Agent will be the personal needs, academic aspirations, and career objectives of the students they are counselling
- Recognised Agents will be obliged to act ethically and in full accordance with the London Statement, and will be contractually obligated not to conduct themselves in any way that is detrimental to ENZ, education providers, or the New Zealand education industry
- They are also required to take responsibility for the provision of any false, fraudulent, or misrepresented documentation provided in the application for a Student Visa made to Immigration New Zealand. With the understanding that their status as a Recognised Agent is in jeopardy if they knowingly provide false or misleading information
- Recognised Agents should also expect that any complaints made against them will be investigated by ENZ's complaints committee, with the possibility of the suspension, or removal, of their status as a Recognised Agent by ENZ.

THREE CORE TENETS

TRAINING

- ENZ is also re-building and upgrading the agent Learning Management System (LMS) and agent training modules
- Once the new LMS is available for agents to access, Recognised Agents will be obligated to undertake courses and modules as directed by ENZ in order to maintain their status.

VALUE OFFERINGS TO RECOGNISED AGENTS

Understanding the motivations of agents helps inform how ENZRA can be most effective. ENZ accreditation has significant value in itself, however in order to maximise interactions with Recognised Agents, ENZ can also consider the following:

- Providing Recognised agents with exclusive marketing material that highlights their status as being accredited by ENZ
- Provide quality, consistent, and regular training to agents that they can then use when promoting New Zealand
- Provide exclusive marketing collateral to Recognised Agents highlighting their status
- Provide access to data and trends via the IntelliLab, allowing agents to better understand in-market trends, and make more informed decisions regarding what courses and institutions they promote
- Provide exclusive access to MyStudyNZ to assist them in finding courses that best suits the needs and requirements of the student
- Provide opportunities for Recognised Agents to organise and run ENZRA Fairs
- Attend education fairs run by Recognised Agents where possible
- Provide opportunities for be-spoke, and in-market promotional activities between education providers, ENZ, and Recognised Agents
- Regular face-to-face training and engagement sessions
- Identifying and publicly celebrating sustained good performance by Recognised Agents
- Engage with education providers to assist them in building and sustaining positive relationships with Recognised Agents.