



EXPORT EDUCATION INDUSTRY DEVELOPMENT FUND

Proposed Work Programme for

2007 / 2008

RESEARCH WORK STREAM

Immigration Policy Benchmarking

Purpose of Project:

This project would benchmark our immigration policy against those of our key competitors (ie: Canada, USA, UK, Australia etc). This exercise would support industry lobbying, as well as providing market information for providers.

Market Research

Purpose of Project:

The key objectives of this project will be to undertake a mix of desk-research and sample analysis of prospective international students through surveys and focus groups, to provide market research of relevance to New Zealand Education institutions and promotional agencies which will inform future marketing strategies, product supply, and pricing decision in two key source countries. The research will cover current projected volume/demand trends of outbound fee-paying international students to key destination countries (particularly USA/Canada; UK/Ireland; Australia and New Zealand); Segmentation of customers by destination country, education sector (from English language to schooling/foundation and tertiary/university), education institution type (private/public mix), and course/programme type (e.g. discipline mix-business, engineering, science etc).

Also to be covered will be an assessment of key 'drivers' in prospective student demand and purchase decisions:- for example Quality, Price, Safety, Articulation pathways, Immigration and job opportunities etc; Process issues (e.g. response to 'turn round' times for admission applications, student visas); Role of 'gatekeepers' and diverse information sources (recruitment agents, internet education exhibitions, parents/teachers and peer recommendation, word of mouth feedback from current students); Price elasticity of demand – estimate price/volume mix from prospective students in response to current and future price/cost level tuition fees/living expenses to reflect factors such as Quality/International Ranking of education institutions; Accreditation of degree programmes by local and overseas professional associations; Location in large cities, regional towns.

Research evidence will be assessed and advice to be provided on appropriate brand messaging for "New Zealand Educated" and cost-effective promotion and recruitment strategies for New Zealand agencies (e.g. Education New Zealand, MoE, NZTE) and education institutions – with particular reference to successful strategies implemented by key competitor countries (Australia, UK, Canada, Ireland).

Markets of interest will be Thailand, and USA.

Agent Research / Training

Purpose of Project

Education agents play a vital role in the promotion of New Zealand's education offerings offshore.

Education New Zealand has undertaken a modest amount of preliminary research on a potential Agent Training and Certification package to up skill and be able to prioritise agents. Discussions held thus far have been wholly supported by all groups as they benefit the International Education industry within New Zealand in a variety of ways, in addition to benefits to education agents' business. The objective of this project is to research and develop a training programme for agents to assist them in the promotion of NZ as an education destination for overseas students.

Student Post Study Progress and Success

Purpose of Project:

What happens to our students once they finish studying with us?

This research would be undertaken focussing on two areas:

- What happens to students once they complete their studies? How do they fit back into their home country / home country education system? Where do they go, ie: to another country to complete studies, and if so why aren't we capturing them in NZ? Role of alumni – do students join and maintain links with NZ? Do students who obtain undergraduate qualifications in NZ have difficulty in obtaining postgraduate qualifications in their home country, and if so why? Is it a country specific problem?
- The visa policy and our marketing is saying study – work – PR. How successful are international students at finding work on completion of their qualifications; are there any differences between ethnic groups, undergraduate and postgraduate qualifications, regional differences? Where do they go, what do they do? What assistance is given to students prior to leaving NZ in 'where to go to from here' – ie: finding employment?

The market of focus for this research is India.

Current Marketing Challenges

Purpose of Project:

The market has changed, and everyone seems to be finding it a challenge. Australia's international student population has increased - NZ's has not. What actually are the challenges, what has caused them, how can we reverse them? Is it a product and price issue, or a marketing issue? Do we need to market differently? What does the research suggest re: policy prescriptions? Where is the industry going, what is the best way to manage/grow from it, and turn it to the industry's advantage? What is Australia doing that NZ is not? This project could target particular markets, as well as identify the unique qualities of the various NZ education sectors, and what strategies they could consider to market themselves offshore in various markets.

Masters Research

Purpose of Project:

This research was initially going to be incorporated into the Current Marketing Challenges project, however has been extracted as a stand alone project.

The objective of this project is to evaluate NZ's position in the international student marketplace for taught masters' degrees, and future development options aimed at international students. This will include a comparative analysis with the UK and Australian models — both in terms of global competitiveness and perceived academic credibility. The research should also analyse wider global trends at the Masters level and set out costs and benefits for NZ of our current system, and of possible alternative approaches to this level of study.

CAPABILITY AND QUALITY DEVELOPMENT WORK STREAM

Leadership Development Programme

Purpose of Project:

The international education industry is a continually changing and evolving environment. Internal and external influences impact significantly. A need has been identified for senior administration staff in this industry for specialised development in managing the dynamics of this environment.

Unitec have completed phase one of this project – the scoping phase, which was supported via industry consultation through both this phase and through the Vince Catherwood report. The outcome of the scoping exercise was the moving forward into developing a Leadership Development programme that focuses initially on training, as well as the modules building towards a First Line Management/Business Level 4 Certificate. There are alternative qualifications that can build onto this certificate also. Phase two will continue with the development and delivery of this qualification.

Industry Dissemination, Research and Resource Facility

Purpose of Project:

Industry Dissemination:

Dissemination of research outcomes, with an overview (where applicable) of how the findings can be incorporated into or addressed by individual sectors, has been highlighted repeatedly as an industry wide need. Although all research reports are available via the ENZ website, individuals have varying preferences in regard to the best method of absorption of information, therefore written, verbal and observational dissemination will be undertaken for relevant reports. We are also mindful of the findings of the Deloitte Review, which indicated the desirability of improved industry wide dissemination in general, and additional publications and a variety of additional means of distributing other information and outcomes to the industry will be undertaken.

Research and Resource Facility, Community Forum / Network – online:

A Research and Resource Facility for sector wide use has been highlighted as an industry need. This Facility would contain all research reports that have been undertaken by ENZ / the EEIDF, as well as other research that would be of interest to the NZ export industry, harvested from other organisations within NZ and from offshore sites.

There will also be a facility for a Community Forum. There has been a consistent request for a networking forum to enable individuals within institutions to seek guidance or advice from their counterparts. This community network forum will contain sections on frequently asked questions; links on where to go for further advice on particular subjects (ie: immigration); and other tips that may be useful. Those that are signed up can register to receive 'alert emails' when a new posting on a topic of interest is logged, and can choose to log in and

view or contribute to any discussion, via a facilitated process. The aim of this project is to assist in networking and sharing of knowledge for industry participants.

As part of this project there would also be a register developed of professional development providers and consultants for industry access to assist with individual institutions professional development needs.

We anticipate that this facility would be attached to the Education NZ industry website.

How to Recruit the Best Students for your Institution (workshop)

Purpose of Project:

With greater transparency and enhanced mobility in education, competition for students has inevitably increased. This workshop will meet an immediate need by assisting institutions in learning how to become more attractive to the best students. Topics will include identifying students – academic levels, interests, push/pull factors; development of attractive educational programmes; pricing and competition; developing a strategic marketing plan – the country specific approach; developing a media communication plan – how effective are advertisements, education fairs, networks, brokers, internet; customer relations management – customer satisfaction, after sales and alumni; the organisation and response rate of the sales department – application, admission and registration.

Code of Practice – Regulatory Compliance Workshops

Purpose of Project:

The objective of the project is to keep support staff updated to assist them in making informed decisions within the guidelines of the Code of Practice for the Pastoral Care of International Students; as well as other regulatory requirements. These workshops would include pre-arrival information, orientation, NZIS information, monitoring, the role of the student support person, accommodation issues, pre departure seminars and any other information that was considered to be essential for their operation, ie: crisis management, identification and monitoring of risk, privacy act and other legislative updates.

Strategic Offshore Development Enabler

Purpose of Project:

This output enables Industry Support and Development activities to be undertaken. It recognises that organisational activities that could be undertaken by institutions in particular key markets that provide generic benefit should be supported by the Industry Development Fund.

At this stage it is not possible to set out what activities might be undertaken, or the markets in which they will be undertaken. This is dependent on the offshore development opportunities that may arise. However, the range of activities that might be supported includes:

- Presentation of papers by invitation from an overseas provider, on NZ education and related activities at high profile overseas conferences, at which the presence of a NZ representative will positively increase the profile of the NZ Education Industry;
- Representation at an event (as above) where the information gained would be of benefit to the NZ Export Education Industry as a whole;
- Development of new capability or quality initiatives/resources for the benefit of the industry;
- 'Ad-hoc' funding of emerging opportunities.

There will obviously be a degree of personal benefit for any organisation undertaking such an activity, therefore co-investment will be a parameter around this output, as will be a maximum individual funding claim. This would enable the support of more than one organisation / sector / event.

Funding would be provided upon receipt of a post-activity report for industry wide access.

PROMOTIONS WORK STREAM

Generic Campaigns in Support of Depth Strategy

Purpose of Project:

A two stage industry consultation process was undertaken, and PRG met during the process to make interim decisions and provide further guidance.

In summary, the depth markets selected are:

- China
- India
- Viet Nam
- South Korea

The fifth market is a composite of five separate markets:

- North America
- Thailand
- Germany
- Brazil
- Malaysia

This is the same output as last year, for the same purpose – support of the nominated Tier 1 and Tier 2 markets. The overall dollar total is slightly lower for two reasons – the overall fiscal envelope is slightly smaller this year, and some of the work especially on the PR side is picked up under the next output breakout (see below).

Note that in past years, the Government has made a specific India allocation, which has added to the overall depth funding available. This was a temporary measure and as such is not included in this years AP.

Market Development and Leverage

Purpose of Project:

This is a new output, and is aimed at supporting the work of the offshore staff network, both in depth markets and especially in the non depth market. Unless this capacity is effectively resourced, then it is wasted potential. Work under this output will be part of the individual

market workplans that each of the ENZ managed staff submit on an annual basis, with interim updates to reflect new opportunities.

Website Evolution and Exploitation

Purpose of Project:

The redevelopment of the 'newzealandeducated.com' website is nearly complete and was funded through the 06/07 AP. The exploitation of the site to maximise its capabilities is now the key focus.

ENZ has made representations to Government for further support of the evolved Brand, and its exploitation. The website is a key element of this exploitation. At this time, we do not know whether this request of Government will be met, and if it is to what level. Accordingly, both this output, and the Brand evolution and exploitation output are 'placeholder' allocations. Should the Government provide further support, then this can supplement or even supplant these allocations. However, should further support not be possible then the output allocations set out here will allow some exploitation and 'roll-out' of both Brand and website.

Website Maintenance

Purpose of Project:

This is an ongoing output. The amount is increased this year, as we anticipate a marked increase in traffic and bandwidth requirement. To cater for this we have undertaken a contested tender for hosting services, with a 'future proofed' spec for potential service supply levels.

Brand Evolution and Exploitation

Purpose of Project:

The Brand evolution project, undertaken by ENZ and BRR Ltd, has completed its major development phase, which was funded out of the 06/07 AP. Our desired objective is very vigorous exploitation, but the allocated output allows for a baseline 'roll out' in the absence of further support.

Industry Media Management

Purpose of Project:

Ongoing and proactive media management is an essential core task, especially in the light of the combination of a static and/or declining market and media preoccupation with some of the more 'sensational' aspects of the industry. These include student incidents, foreign media and Governmental attitudes and coverage, and domestic 'dramas' such as student magazine reportage.

This output is undertaken by ENZ, and has the following overall objectives:

- Build good relationships with key media
- Protect and enhance the public reputation of the industry
- Encourage a positive engagement by current and potential stakeholders via a positive portrayal of industry
- Deal effectively with media and public issues relating to industry and the wider operational environment
- Be a resource for domestic and international media for reliable, factual and relevant information about the industry, either generally or in relation to specific issues

This task is set down in the Pan Industry Strategy as a core industry function, and is funded at the same level as previous years.

Industry Consultation, Liaison and Dissemination

Purpose of Project:

An essential component of the 'whole of industry' approach to generic promotion and marketing is a process of industry consultation. The desirability and need for programme consultation via forums and focus groups continues to grow. This process costs participants time and money, and given that the outcome of consultation is by nature concerned with national rather than institutionally specific issues, the direct cost component to participants should fairly be met.

We are also mindful of the findings of the Deloitte Review, which indicated the desirability of improved industry wide dissemination. Progress has been made in both of these areas, and will continue as a priority.
