An approach to international business recovery planning for Aotearoa/New Zealand schools

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FOREWORD

Tēnā koutou katoa,

The COVID-19 pandemic has profoundly disrupted the international education sector in New Zealand and has had an extraordinary impact on the schools subsector in particular. This is reflected in the reducing membership of the Schools International Education Business Association (SIEBA) as member schools have faced declining international enrolments and extended uncertainty of when students will be able to return to New Zealand.

SIEBA continues to represent the schools subsector in the collective effort to work with the government on an international education recovery plan. Within our organisation, we remain committed to our vision to partner with New Zealand schools to build capability for the advancement of international education, both now and beyond the pandemic.

In late 2020, we engaged Edified, as independent education consultants, to work with us to design an approach to business recovery for New Zealand schools engaged in international education. The first step was to gain deeper insight into the challenges faced by these schools, and the opportunities for development that they identify will be critical to future success. The next step was to develop an international business recovery approach to assist leaders and decision-makers of schools with strategic recovery planning.

The COVID crisis has also presented us with opportunities for change and new thinking. How can we prepare for what is likely to be a rocky ride through recovery, and still protect the quality of the New Zealand student experience and the wellbeing of our people and schools?

The scenarios presented in this document are intended as a starting point to assist schools to prepare themselves for possible futures, not only to be ‘ready to go’, but to have a clear sense of purpose for long-term success. They are an invitation for schools to identify with an approach, and work through the steps in the recovery framework to build a comprehensive international business recovery plan.

We are being challenged to shift our mindsets to innovate, adapt and make strategic business decisions for schools to recover, and to enable international education to thrive again in New Zealand schools.

Ngā mihi nui

John van der Zwan
Executive Director, SIEBA

THE PROCESS

A three step process was agreed.

STEP 1
Future focussed
Advisory group
Workshop
February 2021

STEP 2
Recovery readiness
Survey
March 2021

STEP 3
Recovery readiness
Framework
August 2021
The scenarios presented in this recovery approach, are intended to assist school leaders to prepare themselves, not only to be ‘ready to go’ when the borders open, but to have a clear strategic roadmap for long-term success. The scenarios are an invitation to identify with an approach or narrative, and work through the steps that follow to build a comprehensive international business recovery plan.

In contemplating which scenario is most aligned with the desired future state for an individual school, it is useful to consider the characteristics and mindset that may underpin each approach.

### Executive Summary

The school’s international recovery plan should be an intrinsic part of the school’s strategic plan, with ownership and oversight by school executive leadership.

### ‘How To’ Guide to Recovery Planning

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Return</th>
<th>Rethink</th>
<th>Reimagine</th>
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<tbody>
<tr>
<td>Mindset</td>
<td>Bring back our students</td>
<td>Build back a better sector</td>
<td>Aspire to be world-leading</td>
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<tr>
<td>Student experience</td>
<td>Pastoral care focus</td>
<td>Centred on student success</td>
<td>Excellent student outcomes</td>
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<tr>
<td>Marketing approach</td>
<td>Face-to-face event marketing</td>
<td>Virtual events</td>
<td>Remote recruitment</td>
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<td>Recruitment channels</td>
<td>Offshore ENZ</td>
<td>Local and offshore agents</td>
<td>Collaborative virtual events</td>
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<td>School sector collaboration</td>
<td>Individual school promotion</td>
<td>Regional school clusters/cooperatives</td>
<td>Promote regional pathways</td>
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**Step 1**: Know your ‘why’
- Financial
- Global citizenship
- Diversity and inclusion
- Te Tiriti o Waitangi
- Strategic alignment
- Student experience

**Step 2**: Opt in or pause

**Step 3**: Develop an international recovery plan

**Step 4**: Monitor and refine

The Digital Capability Imperative – Digital acceleration

The Recovery Readiness survey identified the need among schools to further develop and invest in digital capability to support future business recovery. Resources have been developed to assist schools to self-assess their own digital capabilities and identify gaps and priorities for investment as part of a recovery plan.

A digital self-assessment for schools is available here [https://www.surveymonkey.com/r/NZSchoolScorecard](https://www.surveymonkey.com/r/NZSchoolScorecard). Schools are invited to evaluate their digital marketing and remote recruitment capability. A guide to the fundamentals is included in this report.
An approach to international business recovery planning for Aotearoa/New Zealand schools

In the early days of the pandemic, the international education sector was profoundly impacted and initially focused on emergency response and crisis management. Few could have predicted the borders would remain closed for as long as they have. As the global pandemic has evolved, the New Zealand government position has remained firmly grounded in a COVID elimination strategy. The international education sector continues to advocate for a clear indication of when and how international students will be able to return to New Zealand. At the same time, there is an imperative for education providers, including schools, to act now to plan and prepare for business recovery and be in the best possible position for when international business can resume.

This visual journey shows the past, present and anticipated future stages of the pandemic, how the government response has impacted the international education sector and school subsector response.

### COVID EMERGENCY

| Government response | | | |
|---------------------|-----------------|-----------------|
| Crisis response | NZ borders closed to non-residents |
| NZ borders closed to non-residents | Community controls |
| Pause visa processing | Economic stimulus |

| International education sector focus | | | |
|--------------------------------------|-----------------|-----------------|
| Student hardship support | Government lobbying |
| Repatriate students | Shift to online delivery |
| | Provider closures |

| Schools sub-sector focus | | | |
|--------------------------|-----------------|-----------------|
| Student departures | Financial contraction |
| Loss of revenue | Agents diversify to global markets |
| Student distress | Brand NZ strong for COVID response |
| Loss of agent partnerships | |

### COVID PAUSE

| Government response | | | |
|---------------------|-----------------|-----------------|
| NZ borders closed to non-residents | Community controls |
| | Economic stimulus |

| International education sector focus | | | |
|--------------------------------------|-----------------|-----------------|
| Government lobbying | NZ borders closed to non-residents |
| Shift to online delivery | Community controls |
| Provider closures | Economic stimulus |

| Schools sub-sector focus | | | |
|--------------------------|-----------------|-----------------|
| NZ borders closed to non-residents | Community controls |
| | Economic stimulus |

### COVID MITIGATION

| Government response | | | |
|---------------------|-----------------|-----------------|
| Collaborative advocacy to government | Managed return of 1,200 tertiary students |
| | Grow offshore delivery partnerships |

| International education sector focus | | | |
|--------------------------------------|-----------------|-----------------|
| NZ borders closed to non-residents | Community controls |
| | Economic stimulus |

| Schools sub-sector focus | | | |
|--------------------------|-----------------|-----------------|
| NZ borders closed to non-residents | Community controls |
| | Economic stimulus |

### COVID TENTATIVE

| Government response | | | |
|---------------------|-----------------|-----------------|
| Gradual opening of borders | Managed isolation for students |
| | Visa processing for priority segments |

| International education sector focus | | | |
|--------------------------------------|-----------------|-----------------|
| NZ borders open to 'green' zone countries | Visa processing resumed |
| | Vaccinations mandated for student visa |

### COVID INTEGRATED

| Government response | | | |
|---------------------|-----------------|-----------------|
| NZ borders open to 'green' zone countries | Visa processing resumed |
| | Vaccinations mandated for student visa |

### Recovery Planning

<table>
<thead>
<tr>
<th>Impact</th>
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<tr>
<td>NZ lagging behind competitors</td>
<td>Students turn to other destinations</td>
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<table>
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<tr>
<th>Thinking</th>
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<tr>
<td>Our students need our help. Is this going to be short lived?</td>
<td>We will get through this. Will I keep my job?</td>
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<th>Feeling</th>
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<tr>
<td>ANXIOUS</td>
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<td>ANGER</td>
<td>URGENCY</td>
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<tr>
<th>Doing</th>
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<tbody>
<tr>
<td>Supporting students Crisis communications</td>
<td>Supporting students Managing agents</td>
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This visual journey continued.

### Recovery Planning

- **Recovery Planning**
  - NZ lagging behind competitors
  - Students turn to other destinations
  - |

- **Ready-to-go**
  - Clear direction for schools on timing
  - Market message – NZ open

- **Reactivate recruitment**
  - School demand returns
  - Initial slow growth in student numbers
  - Minimal diversity in the initial returning cohorts
  - |

### Impact

- NZ lagging behind competitors
- Students turn to other destinations
- |

### Thinking

- Our students need our help. Is this going to be short lived?
- We will get through this. Will I keep my job?

### Feeling

- ANXIOUS
- PANIC
- ANGER
- URGENCY

### Doing

- Supporting students Crisis communications
- Supporting students Managing agents

### Recovery planning

- Reducing marketing investment
- |

### Resource international departments

- Increasing awareness-raising
- |

### Reactivating agents

- Remote recruitment
- Student safety and wellbeing

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The situation for New Zealand schools is immensely challenging. With international student numbers in New Zealand rapidly diminishing and no new students on the immediate horizon, the impact on educational institutions and international education professionals has compounded. Until such time as there is certainty when the New Zealand border will re-open, the tide will not turn. However, there is a growing realisation within the international education sector that there is no going back to the former ways of doing business. The future of international education calls for innovation and digitisation of the way we think and operate.

The Aotearoa New Zealand Schools Recovery Readiness survey was conducted in February 2021 as the first in a series of initiatives to focus on a new future for international education in New Zealand schools. The 250 international director and school principal respondents to the survey provided a deeper insight into the shared and individual experience of SIEBA member and non-member schools around the country.

International departments in schools that still have international students are focused on a critical concern shared and individual experience of SIEBA member and non-member schools around the country. The situation for New Zealand schools is immensely challenging. With international student numbers in New Zealand rapidly diminishing and no new students on the immediate horizon, the impact on educational institutions and international education professionals has compounded. Until such time as there is certainty when the New Zealand border will re-open, the tide will not turn. However, there is a growing realisation within the international education sector that there is no going back to the former ways of doing business. The future of international education calls for innovation and digitisation of the way we think and operate.

The survey results provided an evidence base for the development of a recovery approach for New Zealand schools to think strategically about how to plan for and practically go about rebuilding their international education programmes, to provide an excellent student experience and a sustainable future for international education in New Zealand.

This recovery readiness approach for New Zealand schools has been based on the data and insights from the survey, consultation with SIEBA and its Future Focused Advisory group of members, and informed by current global trends in international education. The approach is both strategic in focus and includes practical steps to enable schools to plan for business recovery.

**CONTEXTUAL CONSIDERATIONS**

This project was carried out within the current contextual constraints that the international education sector in New Zealand is experiencing. The uncertainty of when the New Zealand borders will be open again for international students – or indeed when international travel will again become safe, frequent and affordable – is a major constraint. Rather than attempt to predict global trends or New Zealand government policy decisions, we have designed a flexible and adaptable approach for schools to be able to keep moving forward within what remains a volatile pandemic situation.

The recovery planning process has been designed for school principals and decision-makers who have a complex challenge on their hands. Strategic leadership is required to navigate through difficult investment decisions while facing revenue losses. Short-term financial risk mitigation has forced staff and budget reductions. The call to action is in planning for a medium-term horizon – to build capability and invest in what is required to prepare schools to be ready to restart their international education programmes.

Findings from the Aotearoa New Zealand Schools Recovery Readiness survey 2021

The Recovery Readiness survey results confirmed that international student recruitment and marketing is in a state of flux in many schools. The sustained reduction of international fee revenue has forced the redeployment or termination of International department staff positions in schools. While 38% of the schools sector survey respondents believed they could retain all their current staff if borders open by February 2022, this dropped sharply to 21% if borders do not open until July 2022. The implications of the borders remaining closed beyond July 2022 are even more impactful, with 37% of larger schools estimating they will lose up to 50% of their current International staff.

Early in 2021, most schools had a marketing and recruitment recovery plan in the process of development. However, only 5% of schools had the recovery plan completed. Marketing budgets have also been reduced. International directors reported that agents, both offshore and onshore, were key to their recruitment channel mix prior to COVID-19. Since the crisis, schools have been mainly focused on maintaining existing agent relationships. Without the ability to travel or to receive students, schools have struggled to maintain agent relationships, with 41% of respondents reporting they have lost some agents. Larger schools have also focused on developing new agent relationships (31%), while one in ten smaller schools reported no change to their agent relationships during the crisis.

Results suggested that general attitudes are both positive and responsive towards digital marketing and capability across the sector. However, resources and guidance are required to support international departments within schools to make the transition into a primarily digital approach.

While one third of respondents were considering or had initiated the use of social media marketing channels, this trend was mainly driven by larger schools. One in three smaller schools have not yet considered any new recruitment innovations. Approximately half (52%) indicated they were participating in virtual recruitment events, and only 32% were using social media marketing channels. Of respondents agreed that digital marketing will be a core part of their school’s future marketing strategy.

Professional development and financial support for advancing digital capability and marketing is critically needed. There is an identified gap in relevant and accessible professional learning and development for the sector, with tight budgets and varied needs. A solution for scalable, accessible professional learning and development (PLD) that’s focused on digital will need to be part of the future recovery strategy. This calls for a more collaborative approach within the sector, and a commitment to support and build recovery capability.

There is a broad understanding that strategic planning for business recovery will require robust sector data and market intelligence on which to make evidence-based decisions. However, only 21% of respondents find the New Zealand schools sector market intelligence and data to be very useful in meeting their school’s current needs. About two in three respondents are willing to share their school’s international education data to improve the quality of market intelligence and data across the sector and to support the sector’s recovery.

Respondents confirmed that SIEBA has an important role to play in long-term business recovery in the provision of resources, training and scenario planning. The majority of schools responding to the survey did not have a fully formed business continuity or recovery plan, with eight in ten in the early stages of developing a recovery plan, if they had one at all.

This recovery framework has been designed in response to the sector survey, to provide a strategic lens, as well as practical steps to recovery planning.
SCENARIO PLANNING
APPROACH TO RECOVERY

Why scenarios?
When faced with the need to plan during uncertainty, scenario planning is an approach that seeks to prepare rather than predict the future. Scenarios are stories about what the future may be like, created through a structured process to stretch thinking, challenge conventional wisdom, and drive better decisions. Scenarios are hypotheses about what could happen, designed to open our eyes to new opportunities or hidden risks.*

*Source: Deloitte, The world remade by COVID-19: Scenarios for resilient leaders | 3–5 years

When considering how this can be applied to the international education sector in New Zealand and the situation in which schools find themselves due to the pandemic disruption, there is value for schools in exploring scenarios and enabling future thinking and strategic planning.

The situational realities of the extended border closures and global uncertainty are demanding new thinking. We are being challenged to shift our mindsets and move beyond a belief that recovery will happen in a linear fashion; rather, it will more likely occur in waves. Further, we are now facing the need to shift our thinking from a post-COVID world to a world where we learn to live with COVID. Such thinking is uncomfortable and challenging.

How can we prepare for what is likely to be a rocky ride through recovery and still protect the quality of the New Zealand student experience, and the wellbeing of our people and schools?

New Zealanders are frequently characterised as pragmatic and resilient people, and the international education profession is no exception. At the same time, there is tension in the circumstances and expectations on the sector, peak bodies, government agencies and the government as a whole to provide leadership and a plan to recover as quickly as possible.

International education is important, but the return of students to New Zealand is a lower priority than other sectors dependent on people crossing the borders. The wellbeing of New Zealanders has taken precedence over economic impact and the real and perceived risks of opening the borders. Schools are being asked by the Government to be ‘ready to go’ and to have the ability to scale up quickly when borders do open. At the same time, schools are having to make the difficult financial decision to let international staff go and lose expertise as a consequence.

Considering the future likely scenarios for the international education sector in New Zealand and the schools subsector specifically, there are some tough truths that must first be acknowledged.

Summary of Key Insights

- A substantial loss of sector expertise is predicted
- Strong support for international education amongst school leadership
- Critical concern for student and parent wellbeing
- Call for a more collaborative approach
- Support and training needs differ amongst school size and type
- Support for advancing digital capability and marketing is needed
- Strategic planning will require improved, regular sector data and market intelligence
- Call for stronger advocacy on behalf of schools
- Schools business recovery planning is in early stages

*Source: Deloitte, The world remade by COVID-19: Scenarios for resilient leaders | 3–5 years
TOUGH TRUTHS

- At best, borders will be open to international students in 2022.
- International tertiary students will be permitted to return before school students are.
- The return of international students will be slow and tightly managed for some time.
- The New Zealand government has signalled a review of international education in primary and intermediate schools.
- More jobs will be lost in schools before students do return.
- Immigration New Zealand has extended the pause on visa processing until February 2022.
- Online delivery to international school students is not permitted by the regulators, leaving little space for innovation.

COVID-19 EFFECT

- The global situation continues to be volatile and unpredictable.
- The virus can still transmit among vaccinated populations.
- Fear of COVID-19 in the community is real and will endure.
- New strains of the virus are impacting each nation’s ability to protect its citizens.

INTERNATIONAL EDUCATION MARKET IMPACT

- Demand for education has shifted towards destinations with open borders.
- Education agents are turning away from New Zealand by necessity.
- Parents of prospective students have been impacted economically.
- International student and parent wellbeing in New Zealand is an increasing concern.
- Parents’ risk appetite for sending children abroad for education has reduced in some source markets.
- Air travel is currently operating at limited capacity and high cost.

RECENT INSIGHTS

On social license for international education in New Zealand:
Recent Education New Zealand (ENZ) research into public perceptions of the international education sector in New Zealand, shows sentiment is generally positive when people are aware of the value of international education to New Zealand. However, in the context of the pandemic, New Zealanders continue to see themselves as a team of 5 million ‘in this together’, placing significant cultural value on social connection. New Zealand’s COVID-19 response is still focused on protecting human beings from other human beings, and there is a very real fear of losing the hard won public health and safety as a result of people coming into New Zealand.

On issues most important to New Zealanders, 42% of New Zealanders feel it’s important that students from overseas are able to study in New Zealand, behind domestic priorities of health, education and the economy. New Zealanders’ awareness of international education as an export sector is low, but when prompted to think about international students in New Zealand:

- 77% agree international students bring different perspectives to New Zealand and our classrooms
- 78% agree international students help with New Zealand’s economy and economic growth
- 76% agree international students contribute to New Zealand’s cultural diversity

New Zealanders’ Perceptions of the International Education Sector
Surveyed in the 2020 pandemic context, December 2020, ENZ/TRA

On international student enrolment numbers:
International student data at April 2021 shows the number of international students onshore with a valid student visa had fallen to 25,523 with only 5,159 remaining in the schools subsector across New Zealand.

2021 onshore valid student visa by subsector

ENZ Insight Story June 2021
On the New Zealand Education brand:

New Zealand's safe handling of the pandemic has resulted in positive brand value. However, 2021 insights show that student demand is turning to accessible destinations. An IDP student survey reported that 39% of students were likely to switch their destination country if it meant they could access face-to-face on-campus learning earlier.

IDP Crossroads IV April 2021

Scenario planning can help schools to visualise possible futures and develop the foresight to plan for a preferred future while adapting to the uncertainties of the present.

The cone of plausibility

Illustration from Untangling New Zealand's Long-Term Future, Wendy McGuinness 2016

The scenarios presented have not attempted to predict timeframes for major policy change, but are designed to be useful for the medium term. When the COVID-19 outbreak closed the borders, there was optimism that the impact would be short-term. We are now experiencing the impact of prolonged border closures that most could not have predicted.

SIEBA is collaborating with other sector peak bodies on a ‘ready to go’ plan with the Ministry for Education, which will include cohort prioritisation for the return of international students, and the plan for safe management of their return. Government agencies are developing the International Education Recovery Plan 2.0 at the time of writing this document.

The scenarios presented here, therefore, are intended to assist schools to prepare themselves at a grassroots level, not only to be ‘ready to go’, but to have a clear strategic roadmap for long-term success. The scenarios are an invitation to identify with an approach or narrative, and work through the steps that follow to build a comprehensive international business recovery plan.
Narrative: Build back a better sector

COVID-19 has turned everything on its axis and we can no longer expect to return to how things used to be; international education is no exception. However uncomfortable to accept, there is a growing understanding that there is no going back, and that we have an opportunity to re-evaluate and improve on the past.

The reality of global travel is such that it will be some time yet before people are able to travel unrestricted, and it is likely that the new ways of recruiting students are here to stay. Many agents have invested in online methods of student attraction, and digital marketing and advertising. Students and parents are online more than ever due to the pandemic, and education events are now virtual and accessible to a wider audience.

New Zealand is losing market share because competitor destination countries have opened up the borders, or never really closed them. Brand New Zealand will likely have slipped off the radar for prospective parents in our key markets. We will have to prepare ourselves to be able to ramp up quickly using remote recruitment methods, and reconnect with agents who performed well for us in the past – if they are still in business.

Until such time as we can bring international students back to New Zealand schools, this is an opportunity to rethink the reasons why schools are participating in international education and prepare a plan for how we will rebuild. The government is expecting the international education sector to be ‘ready-to-go’ when borders re-open, at the same time as talking about a reset to international education in New Zealand. What does that mean for schools?

There have been rapid advances in remote recruitment in the sector globally and we have to ensure New Zealand schools are not left behind. Some schools have invested in online and digital solutions, but there is a long way to go until we can say we deliver a smooth digital user experience across the student/parent/agent journey.

Most have lost international capacity within the school as plummeting enrolments and reductions in revenue have forced job losses. We now need to use this time to plan so we are ready to go and will make best use of scarce resources. International students had a good experience overall in New Zealand schools, but there is always room for improvement. Improving the student experience will pay off in the long run, underpinning the reputation of New Zealand education.

The New Zealand government will continue to be cautious in its pandemic approach. Safe corridors will eventually open up from ‘green countries’, but managed isolation and quarantine will still be required. This will severely limit the accessibility for international students, and school-aged children will be at the back of the queue. The return of international students to the school sector will be gradual. We need to rethink and take a medium-term approach to business recovery.
Narrative: Aspire to be world-leading

The longer the borders remain closed, the more we understand that international education in New Zealand and globally will be irreversibly changed. The COVID-19 crisis and the closure of borders has highlighted the tenuous nature of public support (social license) for international education in New Zealand generally, and strengthened the government’s resolve to make lasting changes to the sector. This disruption has presented the sector with an opportunity to reflect on and reimagine international education in a way that is sustainable for the long-term.

International students bring a lot of benefits to schools and the wider local community, in addition to the financial benefits. Local kiwi students have the opportunity to develop cultural competencies from having international students in the classroom, and we want to do better at enabling this experience when students come back. We can do more to improve the student experience to be enriching and inclusive for all students. We can take the opportunity now to reflect on what students really want from their experience and how we can meet their expectations. If this is done well, we know it is what will keep attracting students in the future.

We can take steps now to be ready to build back and to do it differently. The business of international education has rapidly evolved, driven by digital technologies, online marketing and virtual engagement. If we are going to remain competitive, we will need to be capable of operating in the digital environment, or we risk being left behind. This will take investment in people to develop their digital capabilities, and investment in technologies to support the student journey.

Each school’s international strategy is central to the approach to recovery. The integration of international students into the school is part of the global citizenship education agenda, which has to benefit all students and makes for an optimal student experience. Safety and pastoral care will be more critical than ever, as parents’ anxieties are likely to be heightened at this stage. There will need to be an appropriate budget for adequate support to be provided to every student.

In contemplating which scenario is most aligned with the desired future state for an individual school, it is useful to consider the characteristics and mindset that may underpin each approach.
An approach to international business recovery planning for Aotearoa/New Zealand schools

Future business recovery is predicated on certain assumptions that inform scenario thinking and planning. Future success will likely require the presence of unique supporting characteristics.

**CHARACTERISTICS REQUIRED FOR RECOVERY**

- Focus energy and effort within our area of control or influence
- Develop the capability to be highly adaptable
- Adopt a medium-term mindset
- Practice resilience
- Engage in strategic decision-making

**Recovery assumptions**

- NZ education brand will remain positive for quality education and safety
- Demand for NZ education will return
- The NZ public will be vaccinated and the government will open up the borders for students and tourists from other vaccinated countries
- Education agencies and key relationships will return to promoting NZ
- Kiwis will support the return of international students because the economy needs to grow, and the sector is a significant export earner for NZ

**Risks to recovery**

- NZ will struggle to regain market share and rebuild brand positivity
- Public support (social license) for international students in the community has declined
- Global student recruitment has digitised, and NZ schools will be left behind
- NZ education specialist knowledge and capability is reducing
- Loss of international education professionals
- Changes to student visa policy may restrict growth

“It is a perfect time for a total reset of what we are doing, why we are doing it and how we want to go forward. We can fully professionalise existing and new staff within International departments (this does not mean removing all ‘heart’ from our work), as well as upskilling Principals, Boards, teachers and other support staff around what is involved in offering a quality education to international students within their school.”

(SIEBA SCHOOLS SECTOR SURVEY RESPONDENT)

‘HOW TO’ GUIDE TO RECOVERY PLANNING

The following is a step-by-step guide to recovery planning designed for school leaders and decision-makers to progress through a self-enquiry process. Once the strategic purpose is clear, the recovery framework that follows provides a practical approach to preparing for recovery while continuing with local and global outreach activity.

**STEP 1**
Know your ‘why’

**STEP 2**
Opt in or pause

**STEP 3**
Develop an international recovery plan

**STEP 4**
Monitor recovery, and refine
**STEP 1: Know your ‘why’**

Schools involved with international education have been involved for a myriad of reasons, ranging from historical to philosophical and financial. Developing international education programmes within schools may be championed by leaders or driven by necessity; a recent addition or a long-time feature. Reflecting on the reasons your school is involved and why you want to rebuild again beyond the crisis is a crucial first step in recovery planning.

1. **Financial**
   - What contribution has international student fee revenue made to the school, and what have been the implications and impact since the pandemic crisis?
   - What investment has been returned to international marketing and to improve student experience?

2. **Global citizenship**
   - Does the school have a comprehensive global citizenship strategy in which international student attraction sits alongside benefits for local students?
   - To what extent is the school engaged with global citizenship development and how does this link to international objectives?

3. **Diversity and inclusion**
   - What role does international education play in the school's diversity and inclusion objectives?
   - Is the school focused on the development of cultural competencies for students and staff?

4. **Te Tiriti o Waitangi**
   - How does international education contribute to our obligations under Te Tiriti, and what opportunities are available to Maori to benefit from the school's international engagement?
   - How does the school reflect te ao Maori values in how and why we engage in international education, how it benefits students and how it delivers the experience for international students?

5. **Strategic alignment**
   - How does the school's engagement in international education align with the school's values and purpose?
   - How does our local community benefit from and engage with our international activity?

6. **Student experience**
   - How do our students benefit from the school's engagement with international education?
   - How does the student experience of international students in our school need to be improved?

School leadership, boards of trustees and International staff should reflect on the future scenarios.

- Is there one scenario or elements of the scenarios that resonate more closely with the school's current thinking?
- Is there a scenario that feels most closely aligned with the school's ‘WHY’ or vision for international education in the medium term?

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*I think this crisis presents opportunities for all schools to seriously think about whether it is worthwhile for them to continue to have an international business or programme within their school. Boards of Trustees can look at the true profit or loss of their past international student programmes and use this information to guide what they do in the future.*

(SIEBA SCHOOLS SECTOR SURVEY RESPONDENT)

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**STEP 2: Opt in or pause**

Schools may be in a position to make a decision to either opt in and commit to the road to recovery, or pause international education until the future path is clearer. Each decision will determine a different course of action, and many schools have already paused international operations. Either way, a strategic recovery plan is recommended to provide clarity of direction and purpose, and to identify where business investment is required.

**Pause**

1. Wind down international operations by taking actions such as redeploying International staff and shifting resources elsewhere.
2. Support the remaining international students and parents until they depart.
3. Hibernate and plan for a restart when the international education sector is up and running again and student mobility has returned.

**OR**

**Opt in**

1. Commit to continuing with international education at the school as a strategic objective.
3. Prepare for the school to be ready to scale up as soon as the situation permits.
An approach to international business recovery planning for Aotearoa/New Zealand schools

**STEP 3: Develop an international recovery plan**

The next step is to create a strategic vision for international recovery for the school, considering the role of global citizenship and sustainability in the future business model.

1. Engage with internal stakeholders to gain input and support for the international vision.
2. Using the ‘Recovery framework’, develop a short- to medium-term plan for international business recovery that can be operationalised now, and has the ability to scale up when the situation changes and schools can begin marketing and accepting applications for new students.

**Student experience – LEAD WITH A STUDENT-CENTRED EXPERIENCE**

The quality of the student experience is the primary driver of student and parent choice of school education. This includes quality of the educational experience, social and cultural experience, and health and wellbeing.

- Be clear on the school’s value proposition for international students and parents for both academic-focused or short-term students.
- Develop ‘COVID wellbeing’ policy and procedures to communicate to local and international parents.
- Review the drivers of student wellbeing (ENZ Student Experience Survey 2019). Self-evaluate the school’s own student experience and known opportunities to improve.
- Understand the end-to-end student journey of your international students from their perspective.
- Review the model for student support, including pastoral care compliance and student success and retention.

**International operations – PLAN FOR THE STAGED RETURN OF OPERATIONS**

Most schools have been forced to reduce or redeploy international staff. While international revenues are down, costs of operations must be minimised. Creative solutions to maintaining international operations will allow for recovery preparation activity to continue.

- Consider options available for shared services or outsourced service providers.
- Distribute international responsibilities among teaching or support staff.
- Investigate options for sharing international marketing positions across a group of schools in the region.

**Marketing and recruitment – ENABLE DIGITAL-FIRST RECRUITMENT**

Remote recruitment and marketing using online platforms and driven by digital content has accelerated quickly during the pandemic.

- Review the opportunities to improve the applicant journey by automating the application and enrolment functions.
- Self-assess the school’s digital marketing capability using the self-assessment tool.
- Plan and budget for improvements in digital marketing capability, and identify marketing and brand activity that can be continued until recruitment can restart.
- Review the agent engagement model to include virtual activities.
- Invest in developing digital content to promote across recruitment channels, which showcases the student experience.

**Sustainability – AIM FOR SUSTAINABLE IMPACT**

The pandemic has amplified the need to examine the sustainability of international mobility and business practices, and there is an opportunity to innovate.

- Review how international education practices align with school values on sustainability and climate consciousness.
- Consider opportunities for remote and virtual student experiences, and student acquisition practices.
- Consider implications for international operations of a reduced carbon footprint, and opportunities for the school to offset international travel of students and staff.
People – (RE)BUILD INTERNATIONAL CAPABILITY

The loss of professional staff with international education sector experience is both a reality and a risk. In order to be well placed for recovery, schools need to consider how to mitigate the risk of losing international market knowledge and specialist capability.

• Rethink the international capabilities, structure and skill sets required to support the school’s recovery plan.
• Enable retained and future staff to respond to the demands of new technologies and sector innovation by providing access to appropriate professional development.

Finance and risk management – PLAN FOR SUSTAINABLE GROWTH

Evaluating the costs and benefits of the school’s international business will inform business recovery planning and resourcing.

• Review the costs of the school’s international operating model against revenues.
• Forecast budget requirements to scale up operations in the future.
• Consider budget requirements of operations in a digital recruitment environment, potentially including service providers.
• Evaluate the return on investment of international marketing costs to inform prudent use of marketing spend.
• Access market intelligence and evaluate enquiry-to-enrolment data to inform recruitment planning.
• Ensure market diversity is included in any future international recruitment plan to spread the risks of fluctuating demand and accessibility.

Community and partnerships – CHAMPION GLOBAL CITIZENSHIP FOR REGIONAL AND COMMUNITY BENEFIT

The development of global citizens can bring benefit to individuals, whanau, community and the local economy by building global and cultural competencies.

• Integrate global citizenship education to benefit all students, local and international.
• Build clear community benefits into the school’s international strategy to inform social license communications with the local community stakeholders.
• Consider opportunities for regional collaboration to promote the destination and leverage a collective approach to marketing to share effort and costs.
• If operating as a high school, negotiate a mutually beneficial strategic partnership with the local university to secure pathway outcomes for NCEA students, and to leverage the tertiary brands in marketing and recruitment.

International strategy – DEVELOP A STRATEGY FOR BUSINESS RECOVERY

Evaluate the school’s recovery readiness and how international education aligns with the school’s mission.

• Develop or refresh the school’s international strategy for the next 3–5 years to anchor business recovery alongside the strategic direction of the school.
• Set clear objectives for International that will inform international marketing and recruitment planning.
• Across the school, ensure wide engagement with the international strategy and how it integrates with the school’s broader purpose for students and the community.

STEP 4: Monitor and refine

All three scenarios – Return, Rethink and Reimagine – exist within the context of uncertainty. Any recovery plan will need to be monitored and refined as circumstances evolve; whether that is changes in policy, the gradual return of students through the borders, or global developments.

Identify those actions that can be taken that are not contingent on the borders opening, and focus on building capacity to ensure your school is in a position to be competitive when New Zealand schools are once again open for business.

The school’s international recovery plan should be an intrinsic part of the school’s strategic plan, with ownership and oversight by school executive leadership.

Core principles for future sustainability of the international education sector

The New Zealand government has signalled its continued commitment to the principles of the International Education Strategy 2018–2030 (IES). The goals of the IES remain relevant and can serve as a guide for the future recovery of the sector. While there is sentiment that the detail of the IES is oriented more for the tertiary sector, the overarching goals are universal.

International Education Strategy 2018-2030

This section examines three key areas that are expected to underpin business recovery and the future of the international education sector both within New Zealand and globally.

1. Global citizenship education
2. Sustainability and climate action
3. Growth in school-to-university pathways

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Global citizenship education

Global citizenship education (GCED) has the potential to bring local and international students together through a focus on global issues, and in development of global competencies. International students and parents are increasingly looking for schools that can demonstrably deliver GCED within the educational experience.

UNESCO’S FOCUS AREAS FOR GCED TOWARD SDG4 QUALITY EDUCATION ARE:

- global advocacy and policy dialogue
- the global measurement of progress on GCED and Education for Sustainable Development (ESD) (Target 4.7)
- peace and human rights education
- preventing violent extremism through education.

SDG Target 4.7: By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture’s contribution to sustainable development.

The current global indicator for this target is: 4.7.1. The extent to which
(i) global citizenship education and
(ii) education for sustainable development, including gender equality and human rights, are mainstreamed at all levels in:
(a) national education policies;
(b) curricula;
(c) teacher education; and
(d) student assessment.


GCED encourages global connections and develops young people to thrive and navigate in the chaos of the globally connected world. It is an opportunity to bring students, parents, staff and the local community on the journey by focusing on tangible actions, as well as the philosophical concepts. At the heart, global citizenship is about developing a sense of responsibility and opening up hearts and minds to differing world views.

How might the language of GCED help to bring together local and international students around shared issues, intercultural competencies and breaking down ‘othering’ and separateness?

Reflect on the role of GCED:
1. How is it integrated into the learner experience?
2. How are international students included specifically?
3. Does GCED have a role and a home?
4. Is GCED integrated across the curriculum?
5. Does it form part of the school’s internationalisation strategy?

TIPS FOR GETTING STARTED WITH GCED

1. Value what is already going on in the school, and map across the curriculum.
2. Start small, and grow from there.
3. Communicate well, and bring people along.
   ‘Think deeply, live wisely’.
   (Contributed by Libby Giles, Senior Strategist Global Citizens, St Cuthbert’s)

AFS has developed a free resource, AFS Effect+ for the Classroom Toolkit for Educators, a modular and flexible curriculum that can be delivered in person or online by secondary-level educators.

https://afs.org/2021/07/26/effect-plus-toolkit/

Curriculum resources for schools are available from the following organisations
Centres of Asia-Pacific Excellence
https://cape.org.nz/
OECD/PISA Preparing our Youth for an Inclusive and Sustainable World
Oxfam What is Global Citizenship?
https://www.oxfam.org.uk/education/who-we-are/what-is-global-citizenship/
Sustainability and climate action in international education

Generation Z fear for the future of the planet and are motivated by equity and climate change action. They are increasingly becoming conscious consumers, and there is a growing body of research that indicates that prospective international students are attracted to destination countries that demonstrate values and action on sustainability. In a recent THE (Times Higher Education) survey asking about students’ decision-making drivers, a significant 9% of international students rated a university’s rating on sustainability as the most important factor.*

The Ministry of Education developed the resource Pūtātara as a framework for incorporating sustainability and global citizenship across the curriculum in New Zealand. The resource is designed to support schools and teachers to develop learning opportunities that are place-based, inquiry-led and focused on participation for change. Pūtātara encourages schools and teachers to both create learning opportunities that expand learners’ understanding of complex issues, and take action for change.

Pūtātara also supports learners to explore concepts and issues that surround the Treaty of Waitangi, while building a sense of their own identity and acquiring knowledge of te reo Māori me ōna tikanga.

The New Zealand school curriculum on climate change, sustainability and global citizens, incorporated in Pūtātara, contributes to the rich student experience available to international students. Schools who can demonstrate this well and as part of the value proposition when promoting the school to prospective students will be well placed to attract students and parents looking for an educational experience that ‘walks the talk’.

The Climate Action Network for International Educators (CANIE) is a grassroots initiative formed by international education practitioners from around the world who see the need and the opportunity for the sector to step up and act on climate. Although many educational institutions have sustainability curriculum, programmes and even Net Zero targets, they can often overlook other opportunities to reduce their ecological footprint.

CANIE has identified practical ways for institutions and individuals engaged in international education to make a difference, such as by reducing airline travel and making sustainable choices around which routes and airlines to use, and offsetting carbon when they do fly.

### Three broad principles underpin the Pūtātara resource

**Place-based approaches**
- Worldwide change, right where I stand
Pūtātara supports schools to engage in local solutions for global-world impact. Learners begin by exploring and understanding the place in which they stand. Through inquiry into their own context, they develop a sense of belonging to a common humanity and develop respect for differences and diversity.

**Participation for change**
- I am the change I want to see in the world
Pūtātara supports schools and teachers to create the conditions for learners to respond to the complex challenges of sustainability and contribute actively to their community and world. Learners gain opportunities to participate in positive change for a more peaceful and sustainable world. Creative thinking skills are severely limited in a climate of fear, so this resource does not focus on the ‘doom and gloom’ of inaction – instead, it is unapologetically strengths-based, optimistic, and empowering.

**Integrated, inquiry-based learning**
- Inclusive by design, collaborative by nature
Pūtātara encourages schools, teachers, and learners to respond to the issues of global citizenship and sustainability in their own individualised ways, reflecting the distinct natures of learners, their community, and their local environment.

The Inquiry process within the resource leads learners to develop understanding and to think critically about global, national, and local issues and our interconnectedness on each other and the planet. The resource is inclusive by design and aligned with the principles of Universal Design for Learning, presenting content in varied and engaging formats, connecting across curriculum areas, and encouraging teachers to engage learners in diverse ways.

### CANIE ideas for taking action

- Include climate action in the orientation of new students and in exchange programmes.
- Invest in technology and shape policy to reduce the need to fly – e.g. increase use of video conferencing, and consider including intentions for reducing flight emissions in the recruitment and marketing strategy.
- Select the most energy-efficient airline on a particular route using the Atmosfair Airline Index or Skyscanner’s new environment section.
- Introduce a levy on flights and use the funds to support staff and students to come up with ways to make operations more sustainable.
- Make offsetting flights policy (the best offsetting programmes meet Verified Carbon Standard or Clean Development Mechanism standards). As a guide, 1 tree should be planted for every hour in the air, or plant 10 trees to counteract the emissions from 10 hours of flying.
- Make ethical purchasing and procurement choices.
- Offer students opportunities to take part in climate action projects and workshops.

[https://www.can-ie.org/taking-action.html](https://www.can-ie.org/taking-action.html)

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Growth in school-to-tertiary pathways

New Zealand secondary schools have for many years provided a steady flow of international students for New Zealand universities and tertiary institutions. Yet the transition rates from year 13 to tertiary were trending downwards prior to the pandemic crisis. International school students often plan to leave New Zealand either to return home for university or to travel to a third country such as Australia. Others do not complete year 13 and instead transition to university through foundation pathway programmes.

There is a clear opportunity for schools and tertiary providers to mutually benefit through closer collaboration and through marketing clear and compelling pathway propositions. Some ideas follow:

- Set intentions for close collaboration through formal agreements/memoranda between a school and tertiary provider
- Market the NCEA pathways (and CIE, IB where relevant) and leverage the tertiary brands to recruit new NCEA students
- Leverage tertiary provider agent relationships to include pathway commissions, as a strategy to increase the retention of students in the intended pathway
- Collaborate together on peer-to-peer marketing, using school alumni ambassadors (who have transitioned to tertiary study) to validate the student experience.
- If tertiary providers agree to share school alumni data, this would enable schools to tell the story of alumni success in their marketing message
- Actively encourage school level international students to remain in New Zealand, thus contributing to the regional economy

ENZ and the Minister for Education have signalled a priority on ‘high value’ students. High value has not been clearly defined, but pathway students who are on a long-term academic pathway can be arguably considered as high value. If the future focus is to concentrate on growth in international secondary school students preparing to transition to tertiary level study, then the value proposition for New Zealand is to increase the transition rates to universities and tertiary institutions.

One of the mechanisms to enable pathway transitions is the Pathway Student Visa. Prior to the pandemic, INZ had reviewed the Pathway Student Visa pilot and indicated the visa category would be made a permanent visa category. This visa is valid for up to five years for a student to study up to three courses on a single visa across different education providers. When temporary visa processing is reinstated, the future of the Pathway Student Visa will likely be made clearer.

Source: ENZ Pathway Transition Insights

International student transition from year 13 to tertiary 2015–2019

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International student year 13 NCEA Completions 2015–2019

Source: ENZ Pathway Transition Insights
The Recovery Readiness survey identified a need and desire among schools to further develop and invest in digital capability to support future business recovery. In response, the following resources have been developed to assist schools to self-assess their own digital capabilities and identify gaps and priorities for investment as part of a recovery plan.

**Digital acceleration**

The international marketing and recruitment landscape has been undergoing rapid and significant change for several years, and the impact of COVID-19 has exacerbated this. Our prospects and their influencers, such as parents and agents, are searching for information and making decisions (including those about where to study) almost entirely online, with face-to-face meetings and events used, where it’s even possible, more as confirmation of their decisions, rather than the drivers.

The expectation of this target audience is that all the study options will be readily available to them online, in the palm of their hand, and on demand. This expectation is not unrealistic; it has, in fact, become ‘the norm’ and many education providers, including schools around the world, are responding to the challenge. What is perhaps unrealistic is that a seamless digital experience – with information that is targeted to a specific type of student through a variety of digital channels – is achievable all at once.

Transition to a fully functioning and effective digital engagement strategy will take time, and is best done in stages, where improvement in one area leads to another. There are, however, some practical steps to consider. For example, before running a campaign that directs prospective students and parents to your website, you should review your website content and add the capability to capture their details so that you can provide follow-up information.

This may seem like a huge undertaking, but there are many resources and expertise available to help. The list of ‘digital fundamentals’ below will help to guide this process.

In terms of a post-COVID19 recovery plan, building capability in each of these areas over time will be vital to success, and schools that do not adapt to this new way of marketing and recruitment risk being left behind.
Digital marketing fundamentals

**ASSESS CURRENT LEVEL OF DIGITAL CAPABILITY**
Look at how this compares with your competitors' digital capability and identify gaps that need to be filled. Doing this also gives you an idea of some of the ‘best practice’ digital tactics and a model of digital engagement to aspire to. This assessment can help to guide where to prioritise resources and can also be the basis for a business case for additional funding if required. A digital capability self assessment for schools is available here: https://www.surveymonkey.com/r/NZSchoolsScorecard

**CAPTURE AS MUCH INFORMATION AS POSSIBLE**
Once you have the attention and interest of a prospective student online, finding out whatever you can about them so that you can keep ‘talking’ to them until they make a decision is vital. While a centralised Customer Relationship Management (CRM) system is the ideal solution for some large schools, it is not essential. Simple additions to your website such as data capture forms, downloadable brochures or tools such as online calculators or quizzes as an exchange for their details – are useful and easy to deploy. The main point here is that when a lead is collected, no matter which channel they have come through (website, virtual event, social media enquiry, etc.) their information should be recorded so that follow-up communications can be sent.

**TAILORED EMAILS TO SUIT THE AUDIENCE**
Information (content) and approach (channel) should be tailored. Gone are the days of ‘batch and blast’ emails, where the whole database receives the same information, regardless of who they are and what stage in their decision-making they are at. Where possible, split your database into different age groups, intended start dates or source markets, etc. so that you can deliver the relevant information to them at the appropriate stage.

**SEND OUT REGULAR UPDATES TO YOUR DATABASE**
A successful digital marketing strategy will have tactics in place to build an email list and engage families from their initial point of contact, right through to enrolment. It’s worthwhile creating an automated email series that sends follow-up enquiries. You’ll be able to craft specific emails that are tailored to target your audience at a specific point in their journey, ensuring you can convince them to enrol.

**USE AS MANY DIGITAL CHANNELS AS YOU CAN MANAGE EFFECTIVELY (BUT NOT MORE)**
Websites and emails are considered ‘price of entry’ in international recruitment, and depending on how large the international student programme is, this may be enough. The most important thing is that the content is up-to-date, relevant and interesting. Social media channels such as Facebook, Instagram, Youtube, Snapchat and TikTok are also very popular with this target demographic and are used extensively for word-of-mouth referral, as well as delivering engaging, highly visual and shareable content, and also providing in-time updates. Wherever possible, make sure the channels are linked to each other in the background so that information is not lost, and duplication is avoided.

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**TAKE A MOBILE-FIRST APPROACH**
In most countries, students and their parents will be on their mobile devices as they are searching for information and considering study options. Having a website that is purpose-built for this format will more effectively deliver the information. As a minimum, provide a mobile version of all of the website content, but a more sophisticated approach would include an app, or design and navigation that is purpose-built for mobile format.

**AUTOMATE SIMPLE TASKS**
While many schools will not have or need a marketing automation platform to manage email communications with prospective students, identifying any tasks that can be automated will allow more time to be spent on more high-value conversion tasks, such as phone call follow-ups. Automatic ‘Thank you’ responders for web enquiries are easy additions to existing websites, chatbots can help answer standard or repetitive questions, and setting up ‘flags’ and time-sensitive ‘triggers’ on an enquiry email account will streamline the follow-up process.

**TEST AND LEARN**
One advantage of digital marketing is the ability to quickly review and take remedial action. Analysing data can lead you to some very beneficial findings that will result in greater success in future campaigns. Advertising campaigns and audience data allow you to closely follow behavioural patterns. This gives you the chance to make adjustments to your strategies while they’re in motion, and will also prevent overspending on strategies that aren’t working.
Remote recruitment

With recruitment staff grounded and face-to-face agent meetings put on hold for the foreseeable future, new ways of recruiting students (based largely on online interactions) have become imperative for schools wanting to continue their international student programmes. Many schools have already delivered virtual events and some have boosted online application capability, but there is much more that can be done to achieve a sustainable strategy in the remote recruitment context. Below is a list of areas to consider in developing a long-term, successful remote recruitment strategy.

**AGENT ENGAGEMENT**

Agents have always been a dominant recruitment channel for schools, and reliance on them has increased during COVID. To keep agents interested and informed during this grounded period, without being able to make in-country visits, requires a rethink. What do agents need from us and how can they be encouraged to continue to promote New Zealand as a study option while borders remain closed?

Some options to support agents remotely include:

- an online toolkit including school videos and digital brochures
- online training with marketing and admissions teams
- on-demand training using videos, etc. via the school website
- a dedicated agent portal, which could include:
  - downloadable brochures
  - an application Checklist
  - links to videos
  - an image library and brand assets such as logos (if approved for use)
  - student stories and outcomes
  - latest news and policy/school updates
  - a contact list of who to contact for different questions
- access to an application dashboard to check the status of their applications
- a phone or chat hotline for urgent enquiries
- virtual recruitment events
- virtual familiarisation tours
- a dedicated WeChat (or similar) account for agents

In a changed agent landscape, there is also a need to consider how agent aggregators (sometimes called master agents) can be included in the agent mix alongside traditional agents.

**MULTICHLANAL ENQUIRY SUBMISSION**

This means having several ways to receive and respond to an enquiry. Having email or phone options available only during office hours limits the ability to respond quickly and can also create a backlog of enquiries when the office is open. For common enquiries, an FAQ sheet accessible via the website can be useful. Some schools have gone further and developed an AI-based chatbot for commonly asked questions. Using dedicated Facebook or WeChat groups, website enquiry forms and peer-to-peer chat functions are becoming more popular with schools who have high volumes of enquiries from students directly or from agents.

**ONLINE APPLICATION PORTALS**

Many New Zealand schools have an application portal in place, and this positions them well to receive applications and accompanying documentation efficiently. Whether applications are uploaded directly by students or by agents, the most important thing is that the portal integrates with existing student management systems so that the risk of data loss is reduced.

**VIRTUAL EVENTS**

Virtual events are a great way to present your school in an engaging way, with video, presentations and opportunities to chat with staff and current students. As a minimum, schools should be participating in virtual events run by agents and other industry organisations, but ideally, you should be hosting your own.

**VIRTUAL SCHOOL TOURS**

In contrast to static content, videos that provide a tour of the school are a much more interesting way of showcasing the school’s features and introducing prospects to its people. The video can be hosted on the school’s website, and can also be edited into short 10-20-second bites that can also be used in social media. While professionally produced videos are preferred for their high quality, there is also value in user-generated videos, captured by current students on mobile devices. These keep the costs down and create a feeling of authenticity.
Looking forward to a positive future

It is SIEBA’s intention to provide a useful resource for New Zealand schools as we navigate the road to international business recovery. We acknowledge there are a wide range of schools engaged in international education, varying in size and access to resources, which will impact on some schools’ ability to recover more quickly than others. The call to action is to take the next step, develop a strategic recovery plan and be prepared and ready to restart as soon as the situation permits. Investment is required, however small steps can make a significant difference. There are opportunities for schools to work collaboratively; to share knowledge, ideas and reduce costs. New Zealand will, once again, stand out internationally as offering a unique and quality student experience and SIEBA is committed to supporting schools on the road to recovery.

AN INTERNATIONAL EDUCATION STRATEGY for New Zealand 2018 – 2030

This International Education Strategy aims to create an environment where international education can thrive and provide economic, social and cultural benefits for all New Zealand. It builds on New Zealand’s quality education system and focuses on delivering both good education outcomes for international students and global opportunities for domestic students and our education institutions. The Strategy is underpinned by the International Student Wellbeing Strategy, and a commitment to maintaining the integrity of New Zealand’s immigration system.

GOALS

Excellent education and student experience
Sustainable growth
Global citizens

WHAT WE WILL ACHIEVE

International students receive a high-quality education
International students are welcome and safe
New Zealand delivers an excellent overall international student experience
International education is a high-value, high-quality sector, sought out for its distinctive New Zealand proposition
Regions throughout New Zealand increasingly share the benefits of international education
The international education sector flourishes through diversification of markets, people flows and innovative products and services
All students gain the knowledge, skills and capabilities they need to live, work and learn globally
International education provides stronger global connections, research links and partnerships for New Zealand
New Zealanders understand and embrace the benefits of international education

OUTCOME

A thriving and globally connected New Zealand through world-class international education
### APPENDIX B

**International Student Experience Survey Report 2019 Neilsen for ENZ**

#### PROFILE

**HIGH SCHOOL STUDENTS**

High school students who responded to the survey tended to be less positive than older students about their experience relative to expectations. They would like to feel more included in class and to have friendships beyond the international student fraternity.

**Key drivers:** The two key drivers of Overall Experience for a first year high school student were **Living Experience**, followed by **Arrival and Orientation**. For those not in their first year, **Living Experience** and **Education Experience** were the two key drivers.

High school students’ experience ratings for Living Experience were a little below the average (56% cf. 58% overall). Similarly, their ratings of their Arrival and Orientation were a little lower than the average (46% cf. 60%).

**Education Experience** is the area for which high school students gave comparatively low ratings (although it was not a major driver of their Overall Experience scores). Only 49% rated their Education Experience as very good or excellent, compared with 57% of all students. High school students did not always feel well supported by their teachers (63% cf. 72% overall), and they did not always feel included in classes (48% cf. 66%).

Nor did they always feel welcomed by other students (53% cf. 60%). In terms of wider connections, high school students were less likely than other students to feel that people get to know them or become friends with them (49% cf. 54% overall).

**Personal outcomes:** When asked if their New Zealand experience so far has helped them develop and grow their confidence, high school students were more likely to give a positive rating (56% said very good or excellent cf. 66% overall). This may be a function of their younger age and lack of work experience.

**Improving the experience:** Compared with other students, high school students were more likely to suggest the need for a wider range of activities and more affordable activities. They also commented on people’s personal attitudes toward international students.

### KEY METRICS

#### HIGH SCHOOL STUDENTS

<table>
<thead>
<tr>
<th>GENDER</th>
<th>Male</th>
<th>Female</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>31</td>
<td>68</td>
<td>1</td>
</tr>
</tbody>
</table>

#### AGE

<table>
<thead>
<tr>
<th>Year</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>6</td>
</tr>
<tr>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>16</td>
<td>32</td>
</tr>
<tr>
<td>17</td>
<td>24</td>
</tr>
<tr>
<td>18-19</td>
<td>20</td>
</tr>
</tbody>
</table>

#### LENGTH OF TIME IN NEW ZEALAND

<table>
<thead>
<tr>
<th>Time</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 3 months</td>
<td>6</td>
</tr>
<tr>
<td>3 months up to one year</td>
<td>36</td>
</tr>
<tr>
<td>First year of multi-year</td>
<td>13</td>
</tr>
<tr>
<td>Other year</td>
<td>34</td>
</tr>
<tr>
<td>Final year</td>
<td>11</td>
</tr>
</tbody>
</table>

#### COUNTRY OF ORIGIN

<table>
<thead>
<tr>
<th>Country</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>24</td>
</tr>
<tr>
<td>India</td>
<td>1</td>
</tr>
<tr>
<td>Japan</td>
<td>17</td>
</tr>
<tr>
<td>Korea</td>
<td>8</td>
</tr>
<tr>
<td>Thailand</td>
<td>8</td>
</tr>
<tr>
<td>Vietnam</td>
<td>7</td>
</tr>
<tr>
<td>South America</td>
<td>3</td>
</tr>
<tr>
<td>Other Asia</td>
<td>6</td>
</tr>
<tr>
<td>Germany</td>
<td>10</td>
</tr>
<tr>
<td>Other Europe</td>
<td>6</td>
</tr>
<tr>
<td>Pacific</td>
<td>3</td>
</tr>
</tbody>
</table>

#### ACCOMMODATION

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared accommodation/family</td>
<td>2</td>
</tr>
<tr>
<td>Honesty/host family</td>
<td>73</td>
</tr>
<tr>
<td>Student accommodation/residence</td>
<td>16</td>
</tr>
<tr>
<td>With relatives/family</td>
<td>16</td>
</tr>
</tbody>
</table>

#### REGION IN NEW ZEALAND

<table>
<thead>
<tr>
<th>Region</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auckland</td>
<td>44</td>
</tr>
<tr>
<td>Waikato</td>
<td>7</td>
</tr>
<tr>
<td>Bay of Plenty</td>
<td>7</td>
</tr>
<tr>
<td>Manukau-Whangāuru</td>
<td>3</td>
</tr>
<tr>
<td>Wellington</td>
<td>12</td>
</tr>
<tr>
<td>Nelson</td>
<td>2</td>
</tr>
<tr>
<td>Canterbury</td>
<td>5</td>
</tr>
<tr>
<td>Otago</td>
<td>3</td>
</tr>
<tr>
<td>Southland</td>
<td>2</td>
</tr>
</tbody>
</table>

#### DRIVERS OF OVERALL EXPERIENCE

<table>
<thead>
<tr>
<th>Driver</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Living Experience</td>
<td>0.36</td>
</tr>
<tr>
<td>Arrival and Orientation</td>
<td>0.30</td>
</tr>
<tr>
<td>People and Connections</td>
<td>0.19</td>
</tr>
<tr>
<td>Study Arrangements</td>
<td>0.10</td>
</tr>
<tr>
<td>Education Experience</td>
<td>0.10</td>
</tr>
<tr>
<td>Value for Money</td>
<td>0.03</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Driver</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>People and Connections</td>
<td>0.18</td>
</tr>
<tr>
<td>Education Experience</td>
<td>0.34</td>
</tr>
<tr>
<td>Living Experience</td>
<td>0.37</td>
</tr>
<tr>
<td>People and Connections</td>
<td>0.18</td>
</tr>
<tr>
<td>Study Arrangements</td>
<td>0.10</td>
</tr>
<tr>
<td>Education Experience</td>
<td>0.10</td>
</tr>
<tr>
<td>Value for Money</td>
<td>0.03</td>
</tr>
</tbody>
</table>

An approach to international business recovery planning for Aotearoa/New Zealand schools

### Snapshot

#### High School Students

<table>
<thead>
<tr>
<th>Overall Experience</th>
<th>86%</th>
<th>6-10 Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor (0-4)</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Adequate (5-6)</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Average (7-8)</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Excellent (9-10)</td>
<td>28%</td>
<td></td>
</tr>
</tbody>
</table>

**Likelihood of Recommending New Zealand**

<table>
<thead>
<tr>
<th>83%</th>
<th>6-10 Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all likely (0-4)</td>
<td>10%</td>
</tr>
<tr>
<td>Neither nor (5)</td>
<td>15%</td>
</tr>
<tr>
<td>Likely (6-7)</td>
<td>24%</td>
</tr>
<tr>
<td>Very likely (8-10)</td>
<td>30%</td>
</tr>
</tbody>
</table>

**Expectations of New Zealand Experience**

<table>
<thead>
<tr>
<th>57%</th>
<th>Met or Exceeded Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>No expectations</td>
<td>7%</td>
</tr>
<tr>
<td>Not met</td>
<td>7%</td>
</tr>
<tr>
<td>Somewhat met</td>
<td>29%</td>
</tr>
<tr>
<td>Met</td>
<td>30%</td>
</tr>
<tr>
<td>Exceeded</td>
<td>21%</td>
</tr>
</tbody>
</table>

**Ratings of Key Experience Aspects**

- Making Study Arrangements: 17% Poor, 39% Adequate, 31% Good, 10% Excellent
- Arrival and Orientation: 36% Poor, 33% Adequate, 33% Good, 15% Excellent
- Education Experience: 32% Poor, 38% Adequate, 36% Good, 12% Excellent
- Living Experience: 28% Poor, 28% Adequate, 37% Good, 19% Excellent
- People and Connections: 60% Poor, 31% Adequate, 36% Good, 18% Excellent
- Value for Money: 63% Poor, 34% Adequate, 17% Good, 10% Excellent

**Personal Outcomes**

Developing personal confidence: 23% Poor, 29% Adequate, 35% Good, 22% Excellent
Preparing me to be a citizen of the world: 23% Poor, 30% Adequate, 24% Good, 13% Excellent
Making progress with my studies: 16% Poor, 35% Adequate, 29% Good, 14% Excellent

*Base: All high school students (n=962)
Q7. How likely would you be to recommend New Zealand as a study destination?
Q8. Overall, how would you rate your overall experience in New Zealand? (0-10 scale)
Q13. How would you rate your overall experience in New Zealand? (0-10 scale)
Q14. How would you rate your overall experience in New Zealand? (0-10 scale)