

Taranaki International Student Retention

7 December 2021



venture
TARANAKI
Te Puna Umanga

Acknowledgements

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PREPARED FOR VENTURE TARANAKI



Students at TET Stadium, Inglewood



PIHMS students

Executive Summary

This research supports re-building the international education sector in Taranaki when borders open. Its focus is how to increase the retention of the approximately 13 international secondary school students who finish school each year in Taranaki, by them choosing to continue to tertiary study in the region e.g., at the Western Institute of Technology at Taranaki (WITT) or the Pacific International Hotel Management School (PIHMS).

The report provides six recommendations to do this, with the main one being changing perceptions of vocational education, and linking to wider opportunities in the regional economy.

It's recognised the number of students is small and the modest potential gains of these recommendations pale into comparison with the challenge of the international education re-build for schools, WITT and PIHMS once borders open. International education is a relationship business, and it's acknowledged that these education institutions are likely to revert to existing strong relationships, tactics and markets to get back to a viable scale as quickly as possible.

To be of wider benefit, this research has also taken a long-term strategic look at what some unique international education propositions for the region could be - propositions that fit with high transition rates to tertiary, regional direction and strengths; as well as the direction of Education New Zealand (ENZ), Te Pūkenga and Immigration New Zealand (INZ).

Background

International education is an intensely competitive space, with not only competition from traditional markets (UK, USA, Canada, Australia), but increasingly from Asia and online. Taranaki however, only needs a small number of students to be successful in the vast pool of demand. Schools, WITT and PIHMS have successfully specialised in specific markets/ regions, with bespoke sales propositions. Pre COVID-19 all were growing student numbers.

There is very little overlap between the target marketing of secondary and tertiary education in Taranaki. For example, in 2019, 41% of international high school students in Taranaki were from Japan and Germany, where across NZ, less than 5% stay for tertiary study. Whereas 56% of tertiary students were from India, where less than 1% of total international students are attending secondary school in NZ.

Between 2009-2019 fifteen Year 13 students transitioned from Taranaki secondary schools to WITT or PIHMS, with 10 going to WITT and 5 to PIHMS. While this is a quite a high transition rate (20%), it equates to 1.5 students a year in comparison to the 790 international students in tertiary study in 2019. Three of these students were interviewed, and they all had family in the region and this was one of the strong draw cards to stay.

China, Korea and Vietnam¹ are the countries where there is the most overlap of students in secondary schools and at tertiary study in Taranaki. However, these are still small numbers, mostly all the tertiary students are at PIHMS, and secondary and tertiary institutions market to different regions/ segments in these countries. Of the students that had transitioned between 2009-2019, Fiji and China were the highest home countries, although not by a significant amount.

Recommendations to encourage transition

The following are potential opportunities to explore further to encourage transition:

1. Providing information that **changes perceptions** of courses offered by WITT and PIHMS:
 - Organise an **online information session** for international students and their parents, particularly focusing on job opportunities from vocational education and student stories
 - WITT providing an **overview session to international directors**, including development in offerings and student stories
 - WITT could also **target international secondary school students in the central north island region**, given these students could be more amenable to Taranaki as a destination
 - Strong promotion of the **PIHMS bachelor degree** to secondary school students from China, Vietnam, Korea
 - Organise for international **agents** to meet PIHMS and WITT graduates during any regional visits
 - Market **internships** with post study work options.
2. Highlight the links between **WITT's strategic development** and secondary school student interests:
 - Consider developing new products that align with WITT's **Sports Academy** (e.g., market Hockey, Adventure Racing, Kite Surfing/ Surfing, Triathlon to German students and market Rugby, Surfing and Golf to Japanese students) and **sustainability** plans with TOPEC.
 - Update students on potential options to study a first year at WITT, and then transition to the second year of university courses that have agreements with WITT.
3. **Pathway scholarships**
 - WITT and PIHMS to consider developing "pathway scholarships" available to local international high school students

4. Targeting **taster programmes** and secondary-tertiary pathway programmes at secondary international students
 - WITT and secondary schools may want to consider joint funding of scholarships to reduce the international fees of secondary-tertiary pathway courses, from school through to the Trades Academy.
5. Continuing to provide an excellent student experience with strong pastoral support, with potential ways to develop this further being:
 - Consider supporting the **PIHMS Student Association** to run events that include or focus on international secondary school students
 - Invite WITT international students to secondary school events to meet students and hold events on the WITT campus.
 - Discuss with Te Wānanga o Aotearoa the opportunity for an offering in language, the indigenous perspective, tikanga and history for international students.

6. Agent relationships

- Examine if agent commission structures have created any significant barriers to students transitioning to tertiary in the region, and if a pathway commission may have merit.

It is noted that there will be a number of **challenges** to implementing these recommendations. This includes the capacity of the sector, the cost, and the uncertainty caused by COVID-19.

There may also be opportunities to develop a programme to encourage international students who leave Taranaki for tertiary study, to come back in the holidays or once their study has been completed, via work experience, internships or employment opportunities.

The case for a new whole-of-region strategic direction

The focus on getting more secondary school students to transition to tertiary study in the region is part of the wider New Zealand International Education Strategy², and growing the benefits of international education beyond just revenue generation.

To realistically think about how to increase transitions, a longer-term strategic approach has also been considered that fits with the direction of the New Zealand International Education Strategy and other drivers.

¹ In 2019 there were 99 Chinese international students in Taranaki, with 22 at schools, 73 at PIHMS and 4 at WITT. For Vietnam, there were 3 at schools and 78 students were at PIHMS. For South Korea 14 students were at schools and 9 at PIHMS.

² Education New Zealand. (2018). *International Education Strategy, He Rautaki Mātauranga a ao: 2018-2030*

In considering a whole-of-region approach that benefits schools, tertiary providers and the needs of the regional economy, the following has been considered:

- The Government's direction is looking for **value over volume**. Value could mean students staying here for secondary and tertiary study, meeting regional skills needs, and/or being alumni that bring overseas business and investment to Taranaki.
- With the **centralisation of international education in Institutes of Technology and Polytechnics (ITPs)** via Te Pūkenga, there is likely to need to be some degree of **niche offering to distinguish a region** on the ITP network. Taranaki has a regional development strategy focused on a low-emissions future with high-value sectors delivering prosperity and sustainability. The region's strengths include energy, food and fibres, engineering, agri-chemicals, biodiversity, manufacturing.
- Te Pūkenga has signalled the importance of international education being part of a wider internationalisation of ITPs to gain benefits beyond revenue generation, with **partnerships with other institutions, student exchanges and business links**. This signals specific links with schools, businesses and tertiary institutions in regions that align with Taranaki's strengths.
- The **cost of university education is increasing** and students increasingly weigh up the cost of a qualification, versus the impact on their employment prospects. The university graduate job market is much

more competitive, with many international students feeling they need Masters-level qualifications to compete. **Vocational education** is often less expensive and provides just as much, or more chance of getting a job straight after study. This is a **compelling sales proposition**, especially with the uncertainty of COVID-19. In addition, Te Pūkenga also offers a new branding opportunity, becoming the 35th largest tertiary institute in the world.

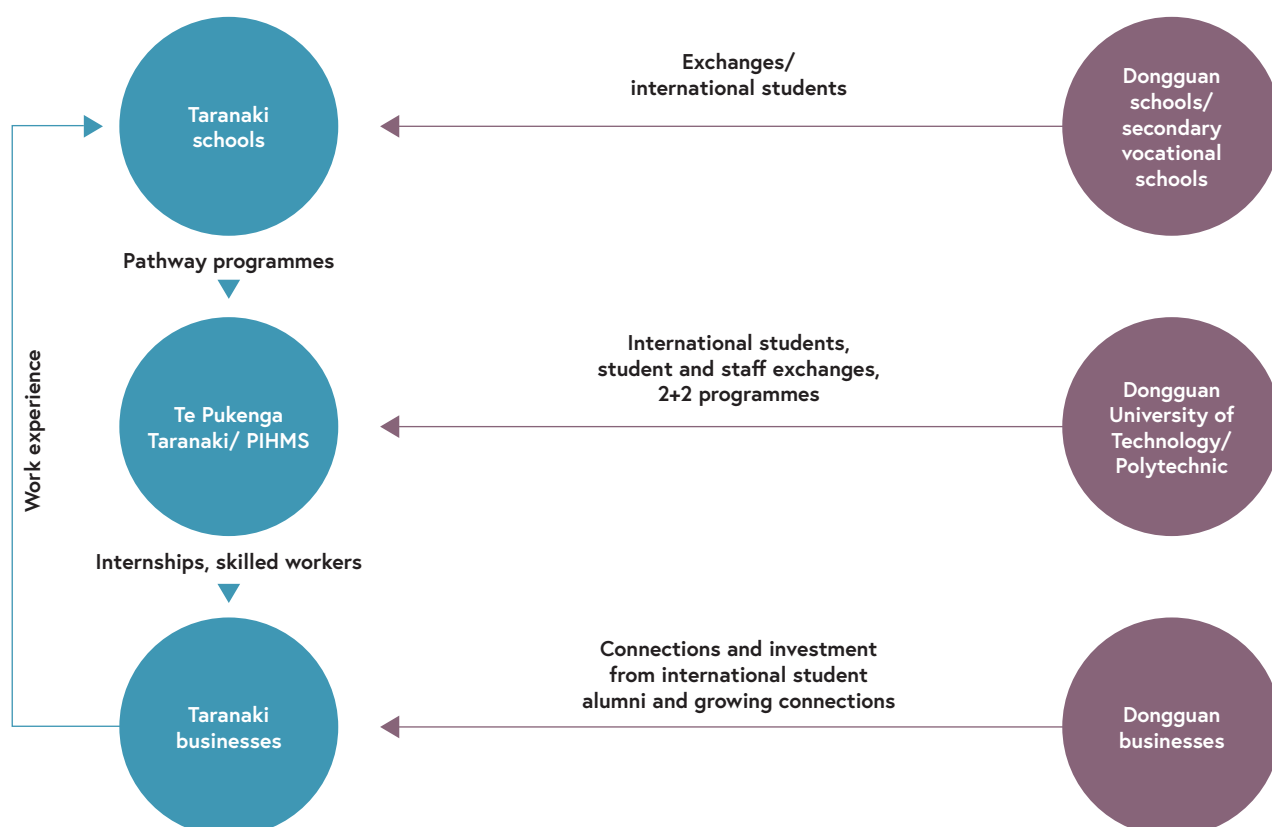
A potential long-term direction

If a whole-of-region approach is applied to secondary and tertiary education and the regional economy, the direction shifts to joined-up connections to overseas regions, focused on the specialised areas mentioned above.

The diagram below illustrates what this could look like. For example, Taranaki could develop a specialisation in low-emissions energy and sustainability, and have partnerships with Dongguan and Kunming, China (electrical engineering and manufacturing); Vestland, Norway (offshore wind); Northern California (new energy IT and manufacturing); and Fukushima, Japan (Hydrogen).

Figure 1 is an illustration of how this might be developed with Dongguan, China. Links could also be widened to Ara Ake, local government and other key groups in the region.

Figure 1: Illustration of whole-of-region model with Dongguan, China





Students at St Marys brainstorming working together school work

The unique sales proposition to attract international students could become:

- **For schools:** Able to market specialised pathway programmes to tertiary study, with options to gain work experience and undertake some study at tertiary institutes while at school. These skills could link with jobs in Taranaki and the students' home region.
- **For WITT/ Te Pūkenga:** Builds links with other institutes to grow specialisms, e.g. opportunity for 2+2 programmes³ and applied research. Opportunities for student and teacher exchange both ways.
- **For PIHMS:** Builds on already excellent reputation and specialisation by growing the reputation of the region in hotel management, sustainable tourism and hospitality.
- **For Taranaki businesses:** Provides access to the skills needed, increased links to businesses in the region, greater awareness of Taranaki, potential connections and investment by international alumni.

The research has considered where these areas could be by looking at existing relationships across education, business and local government; and competitive strengths in regions/ markets. An initial scan of possible areas by sector (in addition to low-emissions energy already mentioned) are:

- **Food and fibre:** Harbin, Northeast China
- **Hotel management, sustainable tourism and hospitality:** Kunming, China; Mishima, Japan
- **Biodiversity and environmental management:** Chile, North America
- **Infrastructure, highways and civil engineering:** Russia and Indonesia

It should be noted that this report was finalised as the re-opening of the New Zealand borders was announced. This illustrates that this is a fast-developing area, and the recommendations should be reviewed in light of any recent developments.

³ This is where an awarding institution reviews the provision of another organization and deems that the curriculum is of an adequate standard for the award of specific credit leading to direct entry into year two, three or four of the specified program at the awarding institution. These arrangements occur most frequently at the undergraduate level. Examples might include 2+2, 3+1, and 2+1 agreements. Students are aware from the outset that they will qualify for advanced standing at a particular institution upon completion of the partner section of the program. There are also a number of other arrangements possible, such as franchising, joint degrees and dual degrees.

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1. Introduction

KEY TAKE-OUTS: This research report has been commissioned by Education New Zealand and Te Puna Umanga/ Venture Taranaki to investigate why international students do not stay in Taranaki after high school, and what opportunities and strategies will encourage them to stay.



New Zealand competes across the world for international students, and there is strong and growing competition. The benefits of the international education sector go beyond just the direct economic benefits. There are some indications that once a student studies abroad, they become loyal advocates for their host nation, and its education system. Education New Zealand (ENZ) notes that recruiting students is expensive and time-consuming, so retaining and transitioning secondary students to higher-value tertiary education makes sense.

Education New Zealand's strategy in this area is to focus on recruiting students with the capability and intention of transitioning to tertiary study. They consider the benefits of this approach include:

- Students will need less intensive support and will have more positive academic experiences because they will already be familiar with the New Zealand culture and system;
- International tertiary enrolments will be spread across a greater number of providers and regions; and
- Tertiary institutions will save on recruitment costs and reduce their environmental impact (carbon footprint will be reduced due to less international travel).

ENZ and the Minister for Education have also 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 (SIEBA, August 2021). It is also likely that the Reform of Vocational Education will make it more likely students are studying courses that are industry relevant and where post study work rights will contribute to reducing skills shortages.

Purpose and scope

The research is part of a broader programme by ENZ on increasing the transition rate for international students moving from secondary to tertiary study (Education New Zealand, June 2021, p. 11).

This research report has been commissioned by Education New Zealand and Te Puna Umanga/ Venture Taranaki to investigate:

1. Why international students don't stay in Taranaki after high school, and what might entice them to stay;
2. What the opportunities are for international students' pathways from an education product perspective (i.e., courses, study programmes, extra-curricular activities or pastoral care);
3. What are initiatives, such as such internships or short programmes, that are available to international students that can act as tasters for long-term programmes;
4. How to inform strategy development by identifying what overseas markets are best for study programmes that encourage the school to tertiary transition that fits with the regional strengths and skill areas identified;
5. How the recruitment and marketing process can be better be utilised to promote long-term retention; and

6. Recommendations for a new student secondary to tertiary transition strategy and some key actions for the international education sector to work on.

Approach to report

Initial research was conducted between 20 September and 15 December 2021.

A desktop analysis of existing research and data was completed. The majority of the research was conducted by interviews. Table 1 summarises the 42 people interviewed. A session on the draft report was also held with the Executive Leadership Team of WITT.

Table 1: Summary of interviews

Area	People interviewed
International students	8
International education agents	6
High school international directors/ staff	4
Education New Zealand international markets staff	9
Tertiary institute international staff	5
Other regional stakeholders	9
Other New Zealand stakeholders	1

COVID-19 has created some challenges in the research as there are fewer international students in Taranaki and education institutions have had to divest resources due to the lack of income.

It should be noted that this report was finalised as the re-opening of the New Zealand borders was announced. As at early December 2021, the Government had announced that fully vaccinated non-New Zealand residents and citizens would be able to enter the country without staying in managed isolation and quarantine. This was however, caveated with a note that this approach may be staged over time to manage the volume of arrivals into New Zealand, health risks, and immigration visa processing capacity⁴. Immigration NZ has also extended the suspension on processing temporary visas, including for students, until at least 5 August 2022.

This is a fast-developing area, and the recommendations should be reviewed in light of any recent developments.

While conducting this research it has also become clear there are many other developments, initiatives and partnerships happening in supporting the transition from secondary to tertiary study for international students. For example, the work of Education New Zealand, similar studies and initiatives in Auckland, Wellington and Dunedin and the work of agents, regional partnerships and the Schools International Education Business Association (SIEBA). This research has completed a high-level scan of developments, but recognises it has not been possible to take all these developments into account, and recommendations should be considered in this context.

2. Background to international education

KEY TAKE-OUTS: International education has been significantly damaged by border closures, and the Government is looking to build back in a way that delivers the NZ International Education Strategy – focused on the wider benefits of international education, beyond just revenue generation.



WITT students at campus

International education in New Zealand

Before COVID-19, international education was New Zealand's fifth largest export sector, earning over \$5 billion in 2019 alone, from over 115,000 students (Education New Zealand, 2018, p.10).

NEW ZEALAND INTERNATIONAL EDUCATION STRATEGY 2018 – 2030

The New Zealand International Education Strategy 2018 – 2030 was published in 2018, with the vision of "A thriving and globally connected New Zealand through world-class international education" (NZ Government, August 2018, p. 5). The Strategy is summarised in Figure 2.

Figure 2: Summary of International Education Strategy (2018-2030)



IMPACT OF COVID-19

New Zealand's international education sector has been decimated by COVID-19. As at June 2021, there were only around 25,500 international students studying across New Zealand.

The impact of border closures has also created significant uncertainty, with providers unsure about what will happen with enrolments in the next few years. Education New Zealand believes it could take up to 10 years to build back to pre COVID-19 levels (Education New Zealand, June 2021, p. 6). This message was reinforced across interviews, with particular concern that many competitor markets already have their borders open, with students particularly shifting to Canada and Ireland. The longer the borders are closed for, the more unwelcoming New Zealand looks, and the higher likelihood that agents who specialised in New Zealand will need to leave the market.

Education New Zealand states that, "As we all look to rebuild, ENZ is focused on broadening out the impact international education can have on and for New Zealand, to ensure the benefits are enduring and are understood by wider audiences." (Education New Zealand, June 2021, p. 6).

International education in Taranaki

KEY TAKE-OUTS: In 2019, 80% of Taranaki's international students were at tertiary level, divided approximately equally between WITT and PIHMS. 20% were at secondary schools, mainly located in five schools in New Plymouth. All sub-sectors were growing.

The markets of India and China dominated the tertiary level. The school markets had strong presences from Japan, Germany and China, followed by smaller presences of Thailand, Vanuatu, Brazil and Korea.

China, Korea and Vietnam were the main markets where there was both a secondary and tertiary presence of international students in Taranaki.

Taranaki's international education average student numbers grew by 45% between 2013 and 2019, from 545 students to 983 students. As shown in Figure 3, this growth has been primarily by the Western Institute of Technology at Taranaki (WITT) - the ITP (Institutes of Technology and Polytechnics) in the region.

Appendix 2 provides a detailed analysis of the characteristics of international students in Taranaki. A summary of provided below.

In 2019, of the total number of international students in Taranaki:

- 42% of students attended Private Training Establishments (PTEs), 38% of students attended ITPs, and 20% of students attended schools.
- Asia dominated the home countries, particularly India and China. The growth in students from India has been driven by the growth of students in the tertiary sector, rather than the secondary sector. This is shown in Figure 4.
- The majority of international students are studying at levels 5-7, as shown in Figure 5.

The main fields of study across students are Food and Hospitality, Business and Management, Sales and Marketing and Accountancy. There was a step-up in all these areas in 2019, and also steady growth in civil engineering, as shown in Figure 6.

As at February 2021 there were there were 299 valid student visas in Taranaki. This includes 36 students at schools, 89 students at PTEs (expected to be PIHMS) and 174 students at ITPs (expected to be WITT).

It should also be noted that:

- The Green School New Zealand opened in Taranaki in February 2020. This is part of an international network of schools with a unique learning approach, and expects non-New Zealand students to make a significant proportion of its enrolment. As the school only recently opened and has been impacted by COVID-19, it's difficult to estimate what the impact on student transitions will be at this stage.
- Te Wānanga o Aotearoa has a New Plymouth campus that offers courses from levels 3 to 6, although only accepts research PhD international students, and does not have any of these in Taranaki.

Figure 3: Taranaki region international students by subsector, 2013-2019

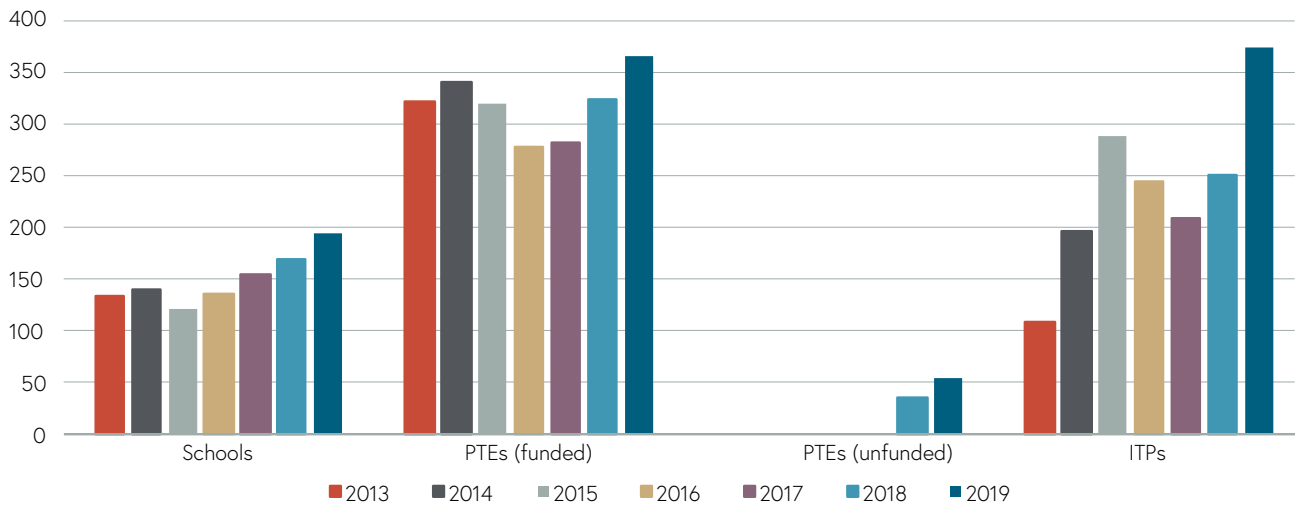


Figure 4: Taranaki Region international students by top ten source countries in 2019

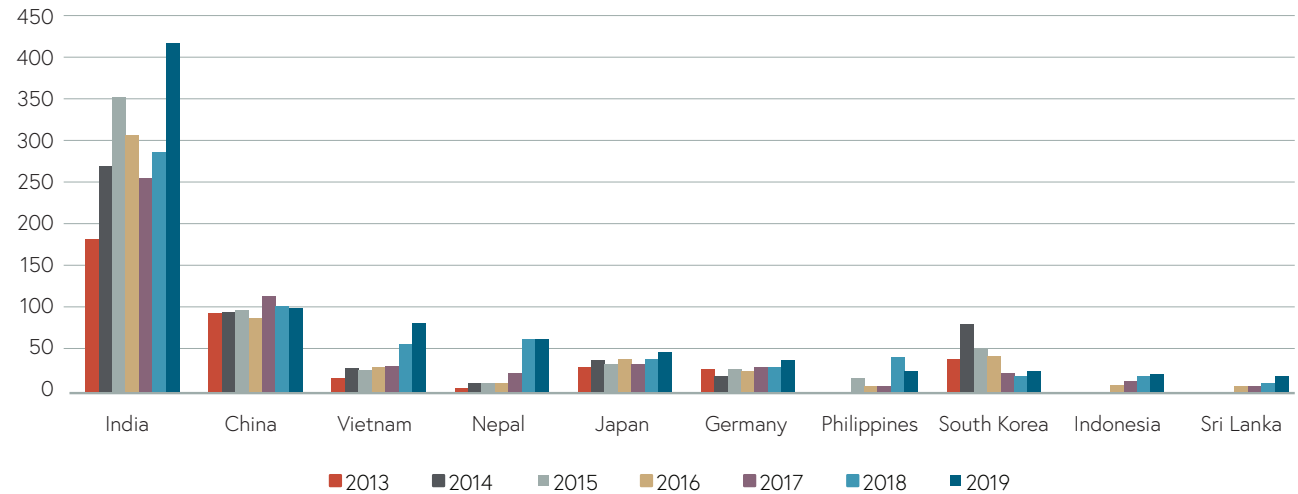


Figure 5: Level of study of international students in Taranaki (2013 – 2019)

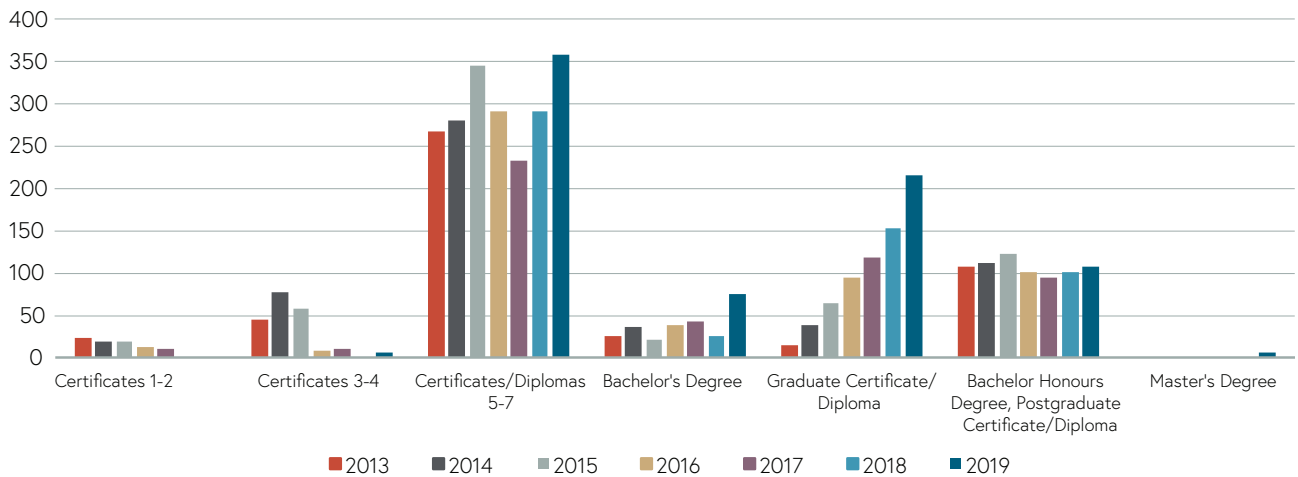
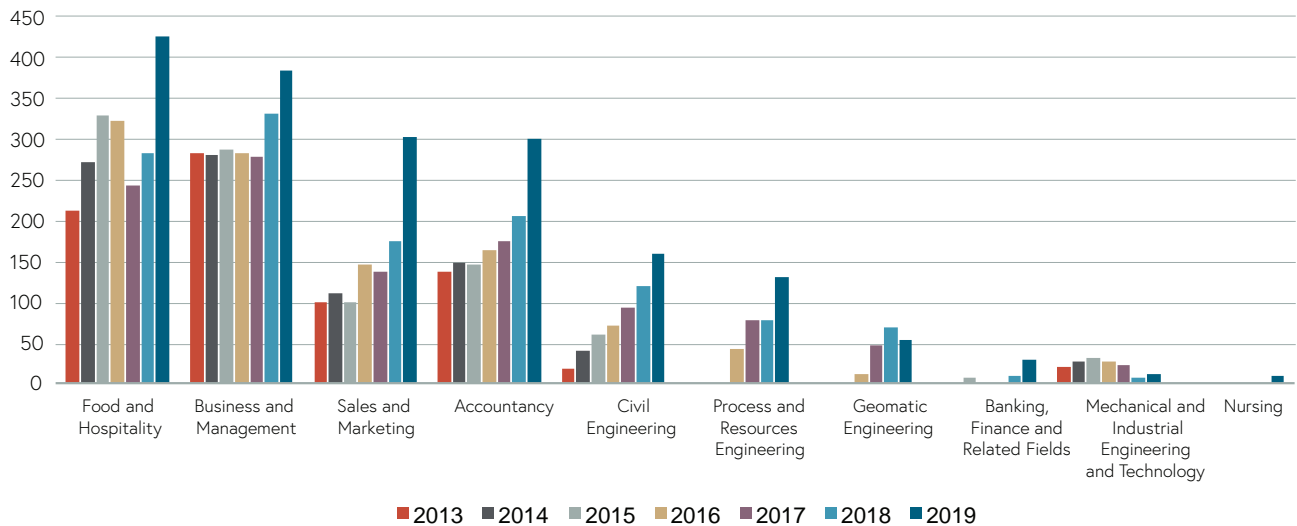


Figure 3-5 Source: Education New Zealand, The Enrolments Data (TED), downloaded from IntelliLab on 23 September 2021

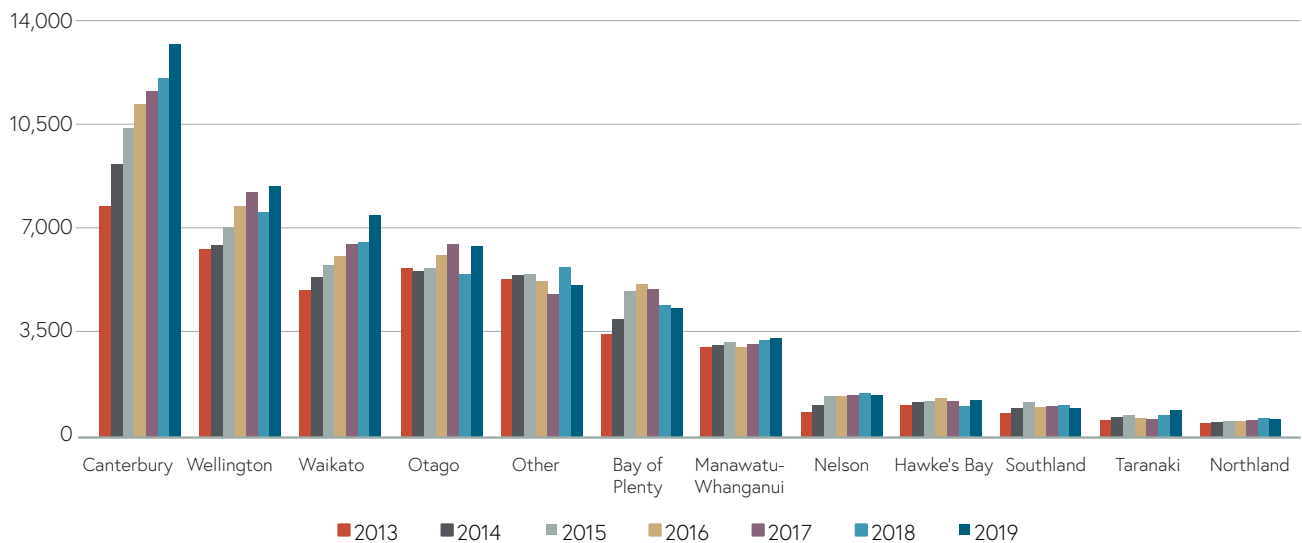
Figure 6: Fields of study of international students in Taranaki (2013 – 2019)



Source: Education New Zealand, The Enrolments Data (TED), downloaded from IntelliLab on 23 September 2021

In comparison to New Zealand, Taranaki's share of total international students is small, but in line with other regions of similar size without a university, such as Nelson, Hawke's Bay and Northland. This is shown in Figure 7. Taranaki has also made greater gains as a percentage of national totals than these other regions.

Figure 7: International students by regions outside of Auckland (2013-2019)



Source: Education New Zealand, The Insight Story: A Quarterly data-based snapshot of the New Zealand International Education Sector, January 2021, page 5.

3. Secondary to tertiary transition

KEY TAKE-OUTS: Over the last five years, an average of 35% of Year 13 international students in Taranaki have transitioned to tertiary study in New Zealand (3.4 students per year). It's estimated 40% of this has been to WITT or PIHMS. Recommendations to increase the transition rate to tertiary study in Taranaki include raising awareness of course offerings at WITT and PIHMS to students, their parents and agents; as well as providing incentives for them to remain in the region.



International students at Te Rewa Rewa Bridge

Introduction

This section considers the transition processes for international students from secondary school to tertiary study. This is a complex area, as while many students choose to go directly into tertiary education after leaving school, some take a break. The transition process is also influenced by many factors outside the education system. This section:

- Analyses New Zealand and Taranaki transitions data for international students to understand the scale and characteristics of what is currently happening;
- Contrasts this to data on transitions of domestic students in Taranaki;
- Provides an overview of the current transition pathways in Taranaki for all students, and then any specific initiatives for international students;
- Summarises the findings of research on barriers and opportunities to pathway to tertiary study in Taranaki; and
- Provides recommendations for consideration.

Transition data

NEW ZEALAND TRANSITIONS DATA FOR INTERNATIONAL STUDENTS

KEY TAKE-OUTS: Pre COVID-19, around 46% of international students at Year 13 transitioned to tertiary study in New Zealand, with most going to universities (87%). The vast majority of students transitioning were Chinese (74%) and living in Auckland (74%).

In New Zealand:

- Between 2015 and 2017, New Zealand's international student transition rate from secondary to tertiary was around 46%. This dropped to 35% in 2019 due to the impact of COVID-19.
- There are four schools in New Zealand with transition rates over 60%, and three of these are in Auckland.
- Of those students transitioning into tertiary, 87% went onto universities; and 9% went to ITPs (now Te Pūkenga) and 4% went to PTEs.
- The majority of transitioning students were enrolling in a Bachelors degree (69%).
- The most common subjects studied were Management and Commerce (33%), followed by Other (21%) and Natural and Physical Sciences (19%).
- The vast majority of students transitioning were Chinese (74%), due to both high student numbers and a high transition rate. The next highest was South Korean (5%) and Vietnamese (3%) (Education New Zealand, March 2021).

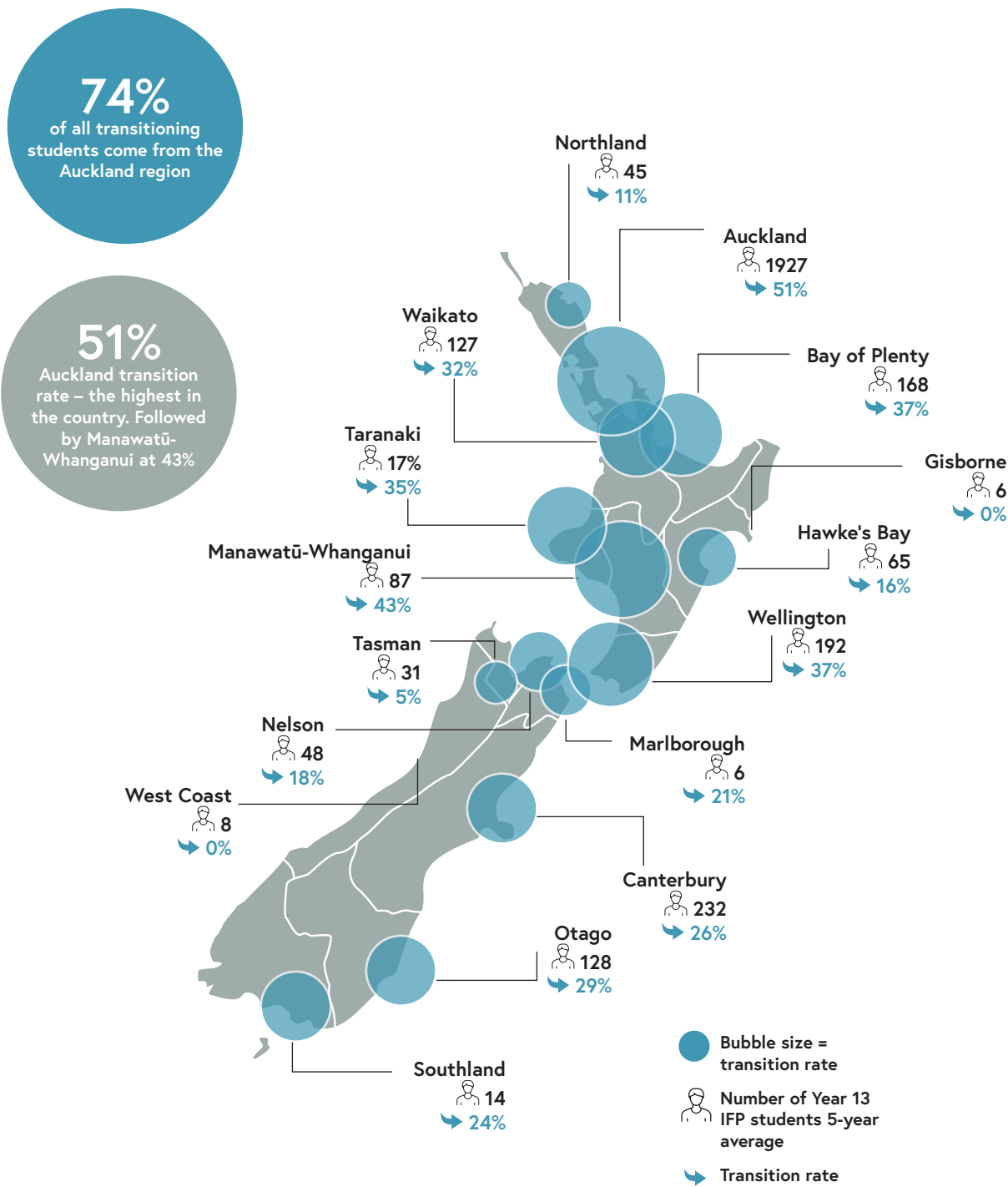
MartinJenkins found with international data that around half students transitioned after five years, meaning that the long game is important. (MartinJenkins, 2021, p. 5).

TARANAKI TRANSITIONS DATA FOR INTERNATIONAL STUDENTS

KEY TAKE-OUTS: Between 2015 and 2019, there were an average of thirteen Year-13 students studying in Taranaki and an average transition rate of 35%. This is the fifth highest rate in New Zealand. Between 2009-2019 fifteen Year 13 students transitioned from Taranaki secondary schools to WITT or PIHMS, with 10 going to WITT and 5 to PIHMS. While this is a quite a high transition rate (20%), it equates to 1.5 students a year in comparison to the 790 international students in tertiary study in 2019. PIHMS estimates that it receives around 10-15 international students from New Zealand secondary schools each year, with many coming from the Central North Island region.

Between 2015 and 2019, there were an average of 13 Year-13 students each year, with 35% of these transitioning to tertiary study. As shown in Figure 8, this is fifth highest transition rate.

Figure 8: Transition rate of year 13 international students to tertiary education in New Zealand (2015-2019)



Between 2009-2019 fifteen Year 13 students transitioned from Taranaki secondary schools to WITT or PIHMS, with 10 going to WITT and 5 to PIHMS. While this is a quite a high transition rate (20%), it equates to 1.5 students a year in comparison to the 790 international students in tertiary study in 2019. Three of these students were interviewed, and they all had family in the region and this was a draw card to stay.

There is very little overlap between the target marketing of secondary and tertiary education in Taranaki. For example, in 2019, 41% of international high school students were from Japan and Germany, where less than 5% stay for tertiary study. Whereas 56% of tertiary students were from India, where less than 1% of total international students are attending secondary school in NZ.

China, Korea and Vietnam⁵ are the countries where there are students in secondary schools and at tertiary study in Taranaki. However, these are still small numbers, mostly all the tertiary students are at PIHMS, with secondary and tertiary providers marketing to different regions/segments in these countries.

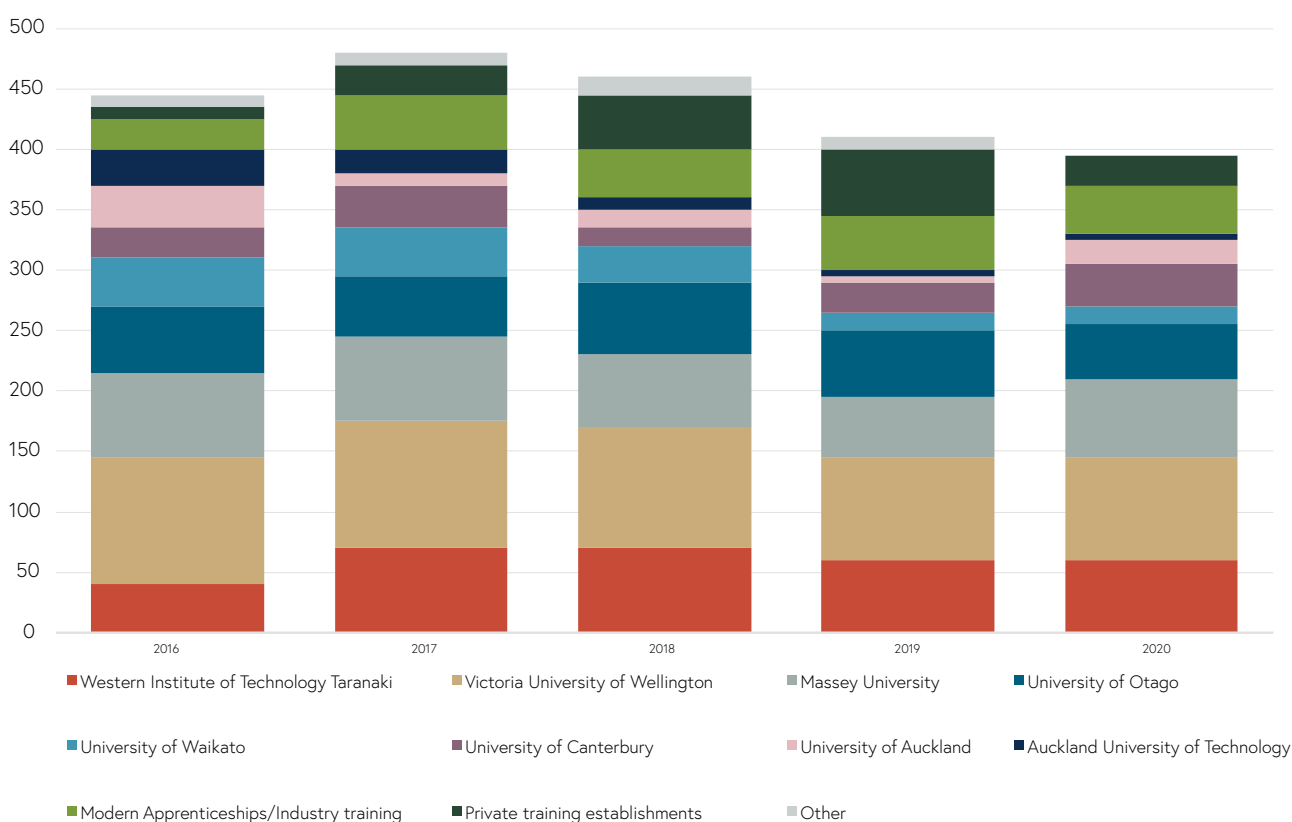
TARANAKI TRANSITIONS DATA FOR DOMESTIC STUDENTS

KEY TAKE-OUTS: In 2020, for domestic students 21% stayed in the region for tertiary study, mainly to study at WITT. 68% left the region to attend universities, the most popular being Victoria University and Massey University.

Below shows the destinations of all Taranaki schools leavers between 2016 and 2020 that went to tertiary study. In 2020:

- 68% went to university, with the most popular choices being Victoria University (22%) and Massey University (16%);
- 15% went to the Western Institute of Technology at Taranaki;
- 10% went to apprenticeships or industry training; and
- 6% went to a PTE in the region, which is most likely to be the Pacific International Hotel Management School.

Figure 9: Tertiary destinations of all Taranaki school leavers (2016-2020)



Source: Ministry of Education, Domestic Students in their first year after leaving school (NCEA Level 3)

⁵ In 2019 there were 99 Chinese international students in Taranaki, with 22 at schools, 73 at PIHMS and 4 at WITT. For Vietnam, there were 3 at schools and 78 students were at PIHMS. For South Korea 14 students were at schools and 9 at PIHMS.

The transition process

NATIONAL FRAMEWORK FOR TRANSITION FROM SECONDARY TO TERTIARY STUDY

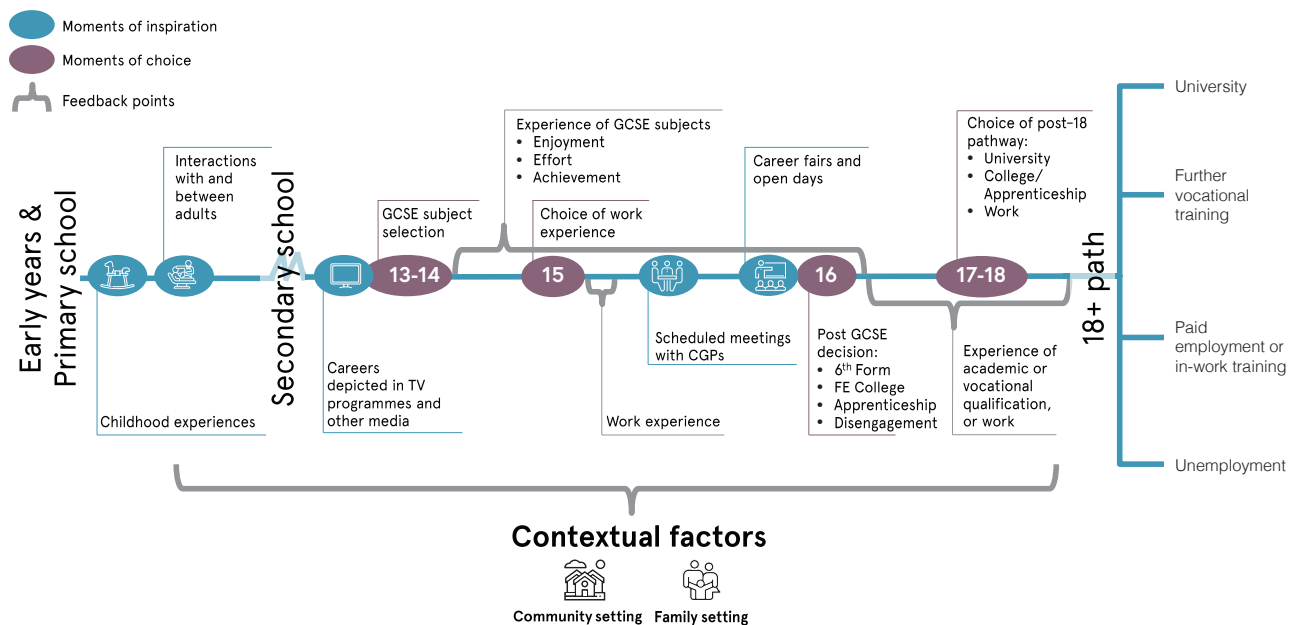
KEY TAKEOUT: There are a range of policies, programmes and pathways that aim to encourage students to transition to tertiary study, noting that the decision-making process starts at a young age and is influenced by a range of factors. There has been an increasing focus on providing more vocational pathways, including a range of programmes such as Gateway, STAR and 3+2.

The Ministry of Education (MoE) and Tertiary Education Commission (TEC) both have a range of strategies and policies that assist students in their decision-making regarding transitioning from secondary education to tertiary study. This includes the Careers System Action Plan (MoE) and the Careers System Strategy and the Tertiary Education Strategy (both TEC).

The MoE National Education Guidelines also require schools to "provide appropriate career education and guidance for all students in year 7 and above, with a particular emphasis on specific career guidance for those students who have been identified by the school as being at risk of leaving school unprepared for the transition to the workplace or further education/training"⁶.

Figure 10 was developed in the United Kingdom, but is relevant to New Zealand and shows the high-level factors impacting decision-making in entering tertiary education.

Figure 10: Education and career journey (from secondary school)



Source: The Behavioural Insights Team. (2016). Moments of Choice.

6 NAG 1, (f). <https://www.education.govt.nz/our-work/legislation/nags/>



New Plymouth Girls' High School library

Martin-Jenkins (2021) considered the concept of the "conversion channel" in understanding pathways. This channel is summarised below, with the key focus being on the "awareness" and "interest" stages

Awareness > To interest > To conversion > to the Customer Experience > Loyalty

This journey of **decision-making** includes the following features/ services:

- **Schools:** Delivering careers advice and guidance, including subject choice and meetings with careers advisors
- **Careers Expos** and open days
- **Tertiary institutes:** Visits and talks to school, marketing and products (e.g., prospectuses and taster programmes) to provide information on study options to prospective students.
- **Careers New Zealand** – Providing information and tools and a partnership approach across the careers network:
 - Careers Website
 - The **Inspiring the Future programme**, that connects primary and intermediate school students with role models from the world of work in a fun and inspiring event that broadens students' horizons about future work possibilities
- **Online learning pathway system** in secondary schools that allows students to explore their interests and aptitudes.
- **Vocational pathways:** A partnership of government agencies, the industry training sector, and representatives from the secondary and tertiary sector and industry and employers. This is a simple way to understand how studies align to industry across six broad sectors.
- **Other government-funded information sources** on tertiary study e.g., the Ministry of Business, Innovation and Employment publishes Occupational Outlook information and the New Zealand Qualifications Authority provides online resources that enables students to compare credits across qualifications
- **Programmes** to assist transition. The tables below are provided by Sacred Heart Girls College to their students to give an overview of what is available in their school, and is a comprehensive summary.

Figure 11: Pathway options for students at Sacred Heart Girls College in Taranaki

Gateway	STAR	Trades Academy	3+2	Te Kura	Redshirts
Supported work experience (in almost any sector) and industry learning and assessments	A range of courses can be studied. Includes beauty carpentry, front of house, hospitality, automotive, sport etc. University courses are available for Year 13	A range of courses can be studied at WITT. Includes building, makeup, police, hairdressing, hospitality, fitness etc	A range of courses can be studied at WITT. Includes police, sport, cookery, makeup and more	A large range of subjects can be studied online. Useful for clashes or if a subject is not offered at SHGC	A customer service and retail course
30 students approx.	1 – 10 students	10 – 20 students	1 – 10 students	Unlimited	8 – 12 students
Level 2 (usually)	Level 1 (usually)	Level 2	Level 3 (and some 2)	Level 1, 2, 3	Level 2
1 day per week for 1-2 terms on average	Half a day, usually 3 times	1 day per week, Term 1-3	2 days per week, Term 1-3	4 hours per week in or out of Pathways	1 day per week for 1 term (Terms 1-3)
20 credits approx.	1 – 6 credits depending on course	20 – 60 credits depending on course	38 – 60 credits depending on course	20 credits depending on the subject	23 credits
Pathway into employment or tertiary education	These are taster courses that can pathway to Trades Academies	Pathway to 3+2, other WITT courses or other tertiary education	Pathway to employment or tertiary education	Pathway into the next level of the subject	Pathway to employment or further training

Porse/ Careerforce/ Plunket/TDHB	Work Ex	External Provider	TSB TOPEC	Accelerator	Tourism
Assisted learning in ECE, Social work and Health careers. Sometimes a placement is required	A flexible opportunity to experience time with an employer of your choice	Occasional one-off courses eg. barista, bartending, cooking, baby-sitting, Duke of Edinburgh, film, taster days eg. PIHMS	NZ Cert Outdoor Experiences (Yr 12) and NZ Cert Outdoor Leadership (Yr 13)	Work experience and leadership mentoring course run by Taranaki Futures	Complete tourism workbooks (or online) for learning about the industry and credits
Unlimited	Unlimited	10 – 20 students	Up to 10 students	20 students approx.	Unlimited
Level 2 or 3	Level 2 or 3	Level 2 or 3	Level 3 (Yr 12) Level 4 (Yr 13)	Level 2 or 3	Level 2 or 3
One line of Pathways and a placement if required	Flexible including holidays	1 -3 days (usually) sometimes after hours eg. 4 - 6pm	One line of Pathways	Tuesdays, 5 -7pm in Term 2	One line of Pathways
20 – 70 credits depending on course	None	8 -15 credits depending on course	Level 3 = 40, Level 4 = 60	None	20 credits approx.
Pathway into employment or tertiary education	Pathway into training or employment	Gain experience and credits for a part time job	Become work ready, build skills and competencies	Gain experience, build networks and learn from people who are doing the job that you want to do	Pathway into training or employment eg. hotel management, cabin crew, event management

Source: www.shgcnp.school.nz/subject/pathways/

Subsequent to decision-making, once enrolled, tertiary institutes have a range of services to support the initial transitions, such as enrolment/application support to reduce "summer melt", pre-enrolment information, orientation weeks and student support services.

THE TARANAKI CONTEXT

KEY TAKE-OUTS: While each school in Taranaki has its own approach to careers information, advice and support; both WITT and PIHMS target marketing to all schools in the region. Universities in New Zealand visit all secondary schools in Taranaki.

There are also a wide range of taster programmes available from universities, well developed secondary to tertiary pathways from WITT, and PIHMS offers Careers Week three times a year.

This section describes in more detail what exists in Taranaki to support transition from secondary to tertiary study.

Secondary schools

Schools provide a careers advisor, who can direct students to information on pathway options that may suit them.

All universities visit Taranaki high schools and provide talks and information. Interested students are able to attend these. The key contact point is the university's school liaison officer or team. These teams are highly experienced and work around the country and across schools to provide information. They also provide a connection to other events, such as on-campus open days and speciality programmes.

The Taranaki Careers Expo Trust Board hold a two-day careers expo annually, with all secondary schools apart from one attending. There are around 50 exhibitors, including WITT, universities, industry training organisations, careers advisors and employers. Free buses are provided to students, and a scholarship programme is also run alongside the Expo. In the week of the Expo, most University Liaison officers do a second visit to schools to provide more information, such as on course options, scholarships and accommodation.

Tertiary institutes

The following is undertaken in the region:

- WITT undertakes significant marketing and liaison with Taranaki schools:
 - Marketing includes social media and wide advertising across print, radio and visual media, a weekly slot on a local radio show, and presence at community events and markets.
 - Open days, taster days, guest lecturers, visits from the Waka Kai Food Truck.
 - Careers Advice and Careers Directory: A dedicated careers advisor for students/ prospective students.
 - Study Prospectus produced and distributed widely.
 - Scholarships to Year 13 students.

- Investment to modernise the Bell Street campus, including signage, refurbishment of the Te Kāuta café and area, a Fitness Factory and computer labs.
- Partnerships across the region, including with TOPEC, the Taranaki District Health Board, Chamber of Commerce, Taranaki Young Professionals, the Taranaki Science Fair, Dress for Success and the Careers Expo.
- Specific engagement on the secondary-tertiary pathways, with visits to all schools in Term 3 following the Careers Expo, and visits in Term 4 to support enrolment.
- WITT also runs the EVelocity programme in partnership with Ara Ake. In 2021, 20 students across 7 schools students built an electric vehicle and then raced them.

- PIHMS undertakes a wide range of marketing and school visits in the region. They also run Careers Week.

WITT's pathway programmes to Universities

WITT has been implementing its new Strategic Plan: Te Korowai Mātauranga o Taranaki, and this includes a range of initiatives to ensure it is an essential regional education hub.

In November 2021, WITT signed Memorandum of Understanding to establish a strategic partnership with the University of Canterbury and Te Herenga Waka–Victoria University of Wellington. The agreement creates opportunities for joint teaching and for students to move more easily from one institution to the other. For example, students studying a first year at WITT, before proceeding to university.

These types of arrangements may appeal to international students who enjoy and feel settled in Taranaki, and can decide to stay an additional year before making a decision to move to a different place to study at a university.

PIHMS: Careers Week

PIHMS runs careers weeks three times a year in the NZ Secondary School Holidays in April, July and October. It aims to provide any year 12 or 13 student the opportunity to experience the culture, lifestyle, education and training at PIHMS.

Over two days students get to:

- Be part of the PIHMS hotel campus by staying on site
- Interact with current PIHMS students
- Find out about different career paths offered within the business, tourism and hospitality industries
- Meet professionals from the tourism, hotel and hospitality industry
- Learn about the PIHMS internationally recognised Diplomas, Degree and Postgraduate qualifications with guaranteed hotel job
- See where our students travel to on their paid Industry Placements
- Meet the friendly PIHMS team and students through a variety of classroom and social activities

- Free time to explore New Plymouth and the surrounding area and all it has to offer
- Welcome and farewell luncheon for family and friends upon arrival and departure.

Other

The organisations below are also listed as providing the following in Taranaki:

- **Trades Academies:** NZ Primary Industries Trades Academy, Huarahi Trades Academy by Te Aho o Te Kura Pounamu
- **Youth Guarantee:** Taranaki Educare Training Trust, U-Turn Community Training Services Limited, Achievement NZ, Feats, Literacy Aotearoa.

The transition experience for international students

KEY TAKE-OUTS: From interviews, most international students had clear ideas of their pathway from a young age, had been heavily influenced by their parents, and been proactive in seeking information about tertiary study. Students who have struggled with the transition have generally used their international director and careers advisor for support. These students are more likely to have transitioned to PIHMS or WITT.

It was clear that students are aware that the first-time job market is becoming increasingly competitive, with many continuing to Masters-level qualifications to differentiate themselves. This is creating greater questioning of if the increasing costs of university study are worth the benefits, particularly if qualifications do not equate to Immigration NZ skill shortages lists. There is a compelling case to highlight to benefits of vocational education in this context.

In Taranaki, international secondary school students can generally be classified into four groups:

- Short-term stay, or Year 10-12 student, who intends to do the final year of school in their home country to attend university there;
- Student in year 13 but intends to do tertiary study back in their home country;
- Students who want to study tertiary education internationally, but not in New Zealand; and
- Students who want to study tertiary education internationally, but not Taranaki.

For the first two groups, it will be very difficult to persuade these students to stay. The section below discusses the main barriers for the second two groups of students.

International students tend to have a clear idea of their pathway...

From interviews, international students who went to university often had a quite specific idea of what they wanted to study and their pathway from an early age. They had normally discussed this with, and been heavily influenced by, their parents. Many were very focused on the goal, aware of what subjects and performance was needed and dedicated to their study.

This included considering the international ranking of universities, and what the best approach was to either seek successful employment in their home country or abroad. There were frequent mentions of how competitive it was to gain employment after graduation in sought after companies by Japanese, Korean and Chinese students.

For example, one student was considering IT or Robotics Engineering, and was weighing up universities in NZ or Germany. The interest in Germany was to live in Europe and learn another language to further bolster their CV.

Kearney reports that, "According to QS international survey data, which focuses on international students undertaking university studies, 45% of parents are decision-makers for tertiary study choice (university and location) for undergraduate students. Agents are more likely to influence decisions about tertiary provider (university choice) than country, with 37% influence over choice of tertiary provider. However, of the students considering New Zealand as a destination for tertiary study, 40% were not planning to use an agent".

This aligns with interviews, where students already studying in secondary school in New Zealand, did not use their original agent to help with their tertiary choice in New Zealand. These students generally used the schools' regular information on universities and careers advice, and also used their International Directors as a source of advice and support. The students interviewed all commented on how supportive the staff at their school were.

In other research, international students have expressed a desire for more specific targeting from school liaison visits to only international students, to provide information that only applies to them e.g., on English entrance requirements, fees and scholarship opportunities (Kearny).

This did not arise in Taranaki interviews, but that may be because of the strong support from international directors at schools, who provide a high level of support. There may be merit in this idea, particularly with WITT substantially broadening its offerings in recent years. (Noting PIHMS is already well-known to school international directors.)

In Taranaki, a number of students stay in hostels, so the staff around the hostel and international director support network is an important source of advice.

Although, for some international education was part of developing their independence and the path was more uncertain...

From interviews there were also students whose pathway was not so clear. Parents saw international education as a way to build students independence and life experience. There were examples where students were struggling with their education, and unsure where to go next. In these cases, both the careers' advisors and International Directors were important sources of support and information.

It is clear that there are particularly good relationships across the international directors in Taranaki, working together.

As shown above, there are a range of pathway options available in Taranaki for students who would enjoy more vocational study, and can earn NCEA credits at the same time e.g., Gateway, STAR, 3+2. These include study at WITT or work experience. Some international students have been interested in studying these, but the Government funding only covers domestic students, for example, WITT has to charge international fees for its courses in addition to the fees the student is already paying the school. In addition, WITT is unable to accept an enrolment from an international student for a pathway course if it means a domestic student would miss out on a place.

There have been two recent examples of students undertaking these programmes. For example, a student from Indonesia took part in the Engineering to E2E (Level 3) under the Trades Academy, and then transitioned to WITT full-time after school to complete the Diploma in Civil Engineering. In this case, the student had to pay an international student fee for the Trades Academy to WITT, but the school agreed reduced their fee by the same amount.

For students whose path is less certain, they need significant support and encouragement to progress on the tertiary pathway. From interviews, it was mentioned that going to a tertiary institute can be very daunting, especially when they have no experience of what it was like. The schools-tertiary pathways programmes offer a great opportunity for students to experience a taster of study at a tertiary institute.

Reasons for leaving New Zealand

Interviews raised a range of reasons why students decided to pursue international tertiary study outside New Zealand:

- University rankings, with many universities in the USA, UK and Australia all having higher rankings than New Zealand, and Auckland University being the only one in the global top 100;
- Perception of better career prospects in economies larger than New Zealand, and the need to study there to access a post study work visa;
- Course options, noting that when you open up options across all the countries above, you can find a very specific course to meet your needs;
- That some course options in New Zealand are highly competitive for international students and only has limited number of places (e.g., for medicine);
- Other universities may not require NCEA Level 3, e.g., a student could study a Foundation Course at a university in the UK after NCEA Level 2, which makes it easier to access the UK course afterwards (especially one that is competitive);
- The desire to live somewhere else, noting that many international students are quite independent after living away from home, and keen to experience other places and/or learn new languages; and
- University fees and living costs – being the key constraining point to all the above. It was noted that the New Zealand Government requires students to show evidence of enough funds to pay for all tuition and living costs, which can be around \$105,000 for a Bachelors degree.

If staying in New Zealand, universities in major cities were a popular choice after living in Taranaki

A strong desire to go to an urban area with more going on was cited multiple times in interviews.

Two students interviewed were studying at Auckland University and commented that they chose this university for the following reasons:

- For one student, it was one of only two universities that offered the course the student wanted to study;
- After being in Taranaki for so long, they wanted to live in a big city with more things to do and more similar to their home city environment; and
- While they appreciated the benefits of having a small number of international students while in Taranaki (i.e., they socialised more with domestic students and developed better English), they were keen to be in a place with a lot more students from their home country.

Both these students decided to rent a flat in the city, rather than seek hostel accommodation as they have been boarding at school for so long and wanted to live away from this structure.

Other reasons for university choice from interviews were:

- It was the only university in New Zealand with the specific course they wanted to study;
- The level of scholarship offered, with an example of one student switching university choice after a more competitive scholarship offer from another New Zealand university; and
- Choosing the university their friends or partner were going to.

There is a mix of students who see their future as returning home, versus staying in New Zealand long-term

The interviews showed the importance of international education in finding a job in a large successful company in their home country. This was described as very competitive and the importance of showing a point of difference, as well as having good English and a degree from a highly rated university.

For other students, they viewed themselves staying in New Zealand for a long-time, and keen to study in New Zealand and gain employment and work experience here afterwards. The immigration system (length of post study work visa and pathway to residency) for these students was viewed as a key strength of staying in New Zealand.

There was growing concern about job prospects after gaining a degree

Some students cited how hard their friends had found it to get a job after gaining a degree, and COVID-19 as increased fears of this occurring. There was growing concern that a degree without a clear job pathway was not as useful, and increasing interest in gaining skills that could directly be used in a job. This shows that marketing vocational qualifications has strong merit.

There are some compelling student stories e.g., about how students had initially started a bachelors programme at a university, but for a variety of reasons, found this was not for them. They then transitioned to a more vocational course and found this transformative. This included using their strengths, gaining on-the-job skills while studying, having a clear pathway into the first-time job market and having a highly in-demand skill.

Pre and post enrolment experiences

The students interviewed who had transitioned to study at universities in New Zealand found the process relatively straight forward. They had similar issues that many students find, such as having to complete application forms, the stress of whether they would be accepted and deciding on their accommodation options. However, they were supported by their school/ international director and they all commented that the visa process was straight-forward.

Interviews also sought to understand the pre and post enrolment process for WITT and PIHMS international students.

At both WITT and PIHMS there is strong support for students during enrolment. For example:

- Pick-up of students from the airport and organising accommodation;
- Specific orientation for international students, including city and campus tours;
- Dedicated pastoral support, for example, WITT's dedicated Indian pastoral worker and also supporting students to quickly find part-time work.

PIHMS has a very active student association. The Association arranges activities and events for students, which is particularly useful as many students don't have vehicles.

It should be noted that WITT has restructured its international operations in 2021 due to border closures and the eventual integration of all ITPs into Te Pūkenga. Decentralising certain functions also aims to allow the revised Pastoral Care of Tertiary and International Learners – Code of Practice 2021 to take a greater presence in the four Schools of WITT where the learners are situated. Pastoral care is now part of the Student Support Services.

BARRIERS IDENTIFIED IN OTHER RESEARCH

MartinJenkins (2021) completed a literature review on international research and initiatives relating to secondary to tertiary transition. It found that very little research had been conducted to date on this area. The review identified the most promising transition strategies across five countries. The summary of conversion strategies and key enablers are below.

Table 2: Summary of conversion strategies identified during literature review (MartinJenkins, 2021, p.6)

AWARENESS/ INTEREST	CONVERSION		
	Push Factor	Bridging factor	Pull factor
Invest in marketing <ul style="list-style-type: none"> • Online • Regional • Social media • Trips/tours (to campus) • Events/fairs • Alumni engagement • Via diplomatic ties • Target social networks (eg host families) 	Provide application support <ul style="list-style-type: none"> • From teachers, mentors • From school counsellors • From International Student Coordinator Provide skills training <ul style="list-style-type: none"> • English language support • Essay writing 	Establish partnerships (secondary-tertiary) <ul style="list-style-type: none"> • Visits – schools to visit campus, tertiary outreach to key schools • Dual enrolment and dual credit • Site integration – secondary school on tertiary campus 	Provide information <ul style="list-style-type: none"> • Easy access to useful information <ul style="list-style-type: none"> – Via online gateway/portal 'one source of truth' – Via career counsellors – Via print brochures Partner with recruitment agents <ul style="list-style-type: none"> • Those responsible for placement of secondary students Build 1-to-1 connections <ul style="list-style-type: none"> • Between students and 'rock star' faculty • Between school students and current tertiary students Offer short-term programmes <ul style="list-style-type: none"> • Pathway programs/transition programs that include language, culture and learning skills • Short courses Lower financial barriers <ul style="list-style-type: none"> • Offer merit scholarships • Offer financial incentives/lower cost tuition • Provide discounts for students who complete short courses and return Streamline application processes <ul style="list-style-type: none"> • Conditional acceptance (eg no extra ESOL tests) • Express mailing of acceptance letters • 'Concierge' service/supports • Streamlined Visa processes • Timely communication

Table 3: Summary of key enablers to conversion from literature review (MartinJenkins, 2021, p. 7)

LEVEL	DETAIL
Remove administrative barriers	Visa application <ul style="list-style-type: none"> Streamlined Visa processes No caps on Visa #s Financial support <ul style="list-style-type: none"> Access to alternative finance options
Strengthen the system	Insights <ul style="list-style-type: none"> Research to understand this student cohort & their choices Understanding (and sharing) of best practice at school & tertiary level Capability building <ul style="list-style-type: none"> Upskilling stakeholders across the system – host families, teachers, tertiary staff etc.
Regional & national enablers	'Lifestyle' factors <ul style="list-style-type: none"> Safe, politically and socially stable > Positive international reputation Access to reasonable accommodation options Low cost of living Whole-of-government approach <ul style="list-style-type: none"> To identify opportunities and strategies To improve overall customer experience including well-being

Recommendations to entice students to stay in Taranaki

Following this analysis, the following are recommendations to explore further to entice secondary school students to pursue tertiary study in Taranaki.

1. PROVIDING INFORMATION THAT CHANGES PERCEPTIONS OF COURSES BY WITT AND PIHMS

As discussed earlier, there is growing appreciation by students that the graduate market is highly competitive, and investing in a vocational direction may have more merit than they thought. The high employment prospects of vocational education, linked to skills shortages in the region may provide a compelling case for some students.

From interviews, it was clear that communication to students, their parents and agents is very important. Students frequently interact with each other through their networks. There is the potential for misinformation based on word of mouth. This illustrates the importance of sharing positive student stories.

Parents are also heavily influencing decisions of students, and may have views of subjects or institutions based on their own experiences, which may well be out of date. This shows the importance of communication to the parents, especially on the number of vocational courses available and career opportunities these provide.

Most agents involved in secondary school placement, also provide tertiary services, and can also be another trusted source of information used by parents and students.

In addition, WITT has significantly developed its offerings over the last few years, and while careers advisors will be aware of this, international directors may be less so.

This includes the MoU's signed with Victoria University of Wellington and Canterbury University, with the vision that students can study a first year at WITT before moving to the second year at these institutions.

- a. *Recommended action:* Organise an **online information session** for students and their parents on options offered in the Taranaki region and stories of student success.
- b. *Recommended action:* WITT to provide an **overview session to international directors** on potential offerings for students, and benefits of study at WITT versus other options. (Noting international directors already have a good understanding of the current offering of PIHMS.)

- c. *Recommended action:* Given the overlaps of some secondary school countries with PIHMS, there is merit in stronger promotion of the **PIHMS bachelor** to secondary school students from China, Vietnam, Korea (and also Italy and Thailand to a smaller extent), particularly stressing the management aspect and employment opportunities.
- d. *Recommended action:* Promotion of WITT qualifications **in engineering and healthcare**, given high local demand for these skills.
- e. *Recommended action:* WITT could **target international secondary school students in the central north island region** in areas that they specialise and courses not offered e.g., biodiversity and nursing.
- f. *Recommended action:* Organise for **agents** to meet PIHMS and WITT graduates during regional visits
- g. *Recommended action:* Market **internships** with post study work options to students who are likely to transition home for tertiary study.

2. LINK WITT'S STRATEGIC DEVELOPMENT AND SECONDARY SCHOOL STUDENT INTERESTS

WITT's strategy has and is continuing to build strengths in a range of areas. Looking at the alignment of this with the current secondary school market and student interests, the following are potential opportunities:

- The **WITT Sports Academy**, has potential to be a drawcard to a number of existing secondary school markets, such as Germany (e.g., regional strengths in hockey, outdoor adventure/adventure racing, kite surfing/surfing, triathlon) and Japan (e.g., regional strengths in rugby, surfing, golf). This will further develop when the multi-sports hub is built.
- **WITT/ TOPEC** are looking at developing a stronger sustainability focus, and this may appeal to German students, who have a high interest in this area and the outdoors.
- Update students on potential options to study a first year at WITT, and then transition to the second year of university courses that have agreements with WITT.

If secondary school students use these facilities and pathway programmes, they may become more aware and interested in continuing their education at WITT.

- h. *Recommended action:* Considering developing products and marketing in the areas above.

3. PATHWAY SCHOLARSHIPS

There were mixed findings on how affordable New Zealand education was. This aligns with Keany's findings that, "Tertiary study fees were a consideration for some of the families, while for others they 'wouldn't have made a difference.' One student was unable to pursue their preferred course of study (Medicine) due to the cost. Another student noted that New Zealand was the only country on the family's study abroad shortlist that was affordable. Another student turned down an offer to study at the University of Auckland due to cost and was only able to return to New Zealand for tertiary study after receiving a full scholarship at the University of Otago".

It was clear that international education is becoming more competitive both with other countries and within New Zealand. Some markets are also very sensitive to scholarships or discounts (e.g., Vietnam and Germany). It was commented that some universities in Australia have created automatic scholarships for all students who study online for a year before, and also that New Zealand will need to be quite aggressive when borders re-open to reclaim the lost share of the market. The availability of scholarships and the overall package will need to be considered.

It was also noted that for some students the scholarship is not necessarily about the reduced cost, but about the prestige associated with it.

Secondary schools and tertiary institutes in Taranaki have generally been hesitant to offer international scholarships. WITT offers a variety of scholarships (e.g., school leavers and Sports Academy scholarships), and currently has \$2,000 regional scholarships plus 4 weeks free accommodation.

- i. *Recommended action:* Review pricing points for a Taranaki strategic approach, and consider the role that scholarships may play. There may be benefit in WITT and PIHMS developing a "Pathway Scholarship" available to local international secondary school students.

4. TARGETING TASTER PROGRAMMES AT INTERNATIONAL STUDENTS AND WITT PART-TIME OPTIONS FOR SECONDARY INTERNATIONAL STUDENTS

Keany found that "try before you buy" was really important given how unnerving the transition process to tertiary can be. PIHMS has had much success running Careers Week, and WITT also offers a wide range of taster programmes and experiences, including the comprehensive secondary-tertiary pathways programmes.

As noted earlier, the government does not fund international students to undertake WITT's secondary to tertiary pathway programmes. This could be a potential barrier if WITT and the school are unable to work out a resolution.

Students working on computer talking with teacher at WITT



There may be benefit in having a taster programme specifically for international secondary school students, and involve the tertiary international students already studying at WITT.

- j. *Recommended action:* WITT and schools may also want to consider joint funding scholarships to reduce the international fees of secondary-tertiary pathway courses, such as Trades Academy.

5. PROVIDING AN EXCELLENT STUDENT EXPERIENCE WITH STRONG SUPPORT

In interviews it was clear that there is a very high level of support offered to Taranaki international students. The homestay managers also had excellent relationships across the homestay families, and quickly able to resolve issues. One student commented how important the International Student Prefect was in helping him settle in.

It was however, clear that many students wanted to seek more urban areas with greater excitement, activities, part time job opportunities and interaction with other international students. While Taranaki cannot replicate Auckland, students commented that they'd like to have more activities and transport. The Taranaki schools have already been organising activities that bring the international students together across schools. This is clearly been important to students, and worth continuing and developing.

It does not seem that social activities have mixed international secondary and tertiary students. PIHMS has an active student association, that undertakes a variety of activities, including cultural activities. Making connections between these students may break down barriers to students considering studying at PIHMS or WITT.

WITT also has had success in reaching out to students by just getting them physically to the campus to experience student life and see what is offered.

In addition, in interviews it was commented that understanding Taranaki and New Zealand's unique Māori culture is important to many international students. The New Plymouth campus of Te Wānanga o Aotearoa could be a good connection and collaboration for an offering to students that provides a taster into language, the indigenous perspective, tikanga and history. Some exploratory conversations signal that Te Wānanga may be interested in this.

- k. *Recommended action:* Consider supporting the PIHMS Student Association and to run events that invite international secondary school students.

- l. *Recommended action:* Invite WITT international students to secondary school events to meet students and hold events on the WITT campus.

- m. *Recommended action:* Discuss with Te Wānanga o Aotearoa the opportunity for an offering in language, the indigenous perspective, tikanga and history for international students.

6. AGENT RELATIONSHIPS

In interviews it was noted that agents may require an agreement with a tertiary institution before they can access a commission. Where students have a pre-existing agreement with their secondary school agent, this may cause issues.

- n. *Recommended action:* Examine if this has been an issue with WITT and PIHMS and if so, if there are ways to address the issue e.g., if a pathway commission may have merit

There may also be opportunities to develop a programme to encourage international students who leave Taranaki for tertiary study, to come back in the holidays or once their study has been completed, via work experience, internships or employment opportunities.

4. A possible future long-term direction

KEY TAKE-OUTS: To think about how to increase transitions further, a longer-term strategic approach has been considered that fits with Taranaki's strengths, and the direction of the New Zealand International Education Strategy, Te Pūkenga and Immigration NZ. This is a whole-of-region, co-ordinated direction, that strategically invests in connections to overseas regions that link to Taranaki's specialised economics areas and builds on existing relationships.



Introduction

Given the limited overlap between secondary and tertiary international student markets, this research takes a long-term strategic look at what some unique international education propositions for the region could be - propositions that fit with high transition rates to tertiary in the region, regional direction and strengths; as well as the direction of Education New Zealand, Te Pūkenga and Immigration New Zealand.

To examine this, the research considers:

- New Zealand current competitive advantages, and Taranaki's advantages within that;
- Future trends in international education and key markets, including the impact of COVID-19;
- The likely direction of Te Pūkenga, Education NZ and Immigration NZ;
- The current and future needs of the regional economy, particularly skill needs;
- Current relationships with overseas regions/ cities, schools, businesses and tertiary institutes.

It concludes by considering what a model of internationalisation across the whole region could look like.

NEW ZEALAND CURRENT COMPETITIVE ADVANTAGES

KEY TAKE-OUTS: Compared to traditional competitors (e.g., UK, US, Australia, Canada), NZ has competitive advantages in affordability, safety, visa requirements and NCEA flexibility. Weaknesses are lower ranking of universities, perceptions of less graduate opportunities and low awareness. Competition has been increasing from both traditional markets, new markets (e.g., Singapore, Malaysia) and online delivery. The long closure of NZ's borders is also weakening our position against our competitors, although the recent border re-opening announcements may change this.

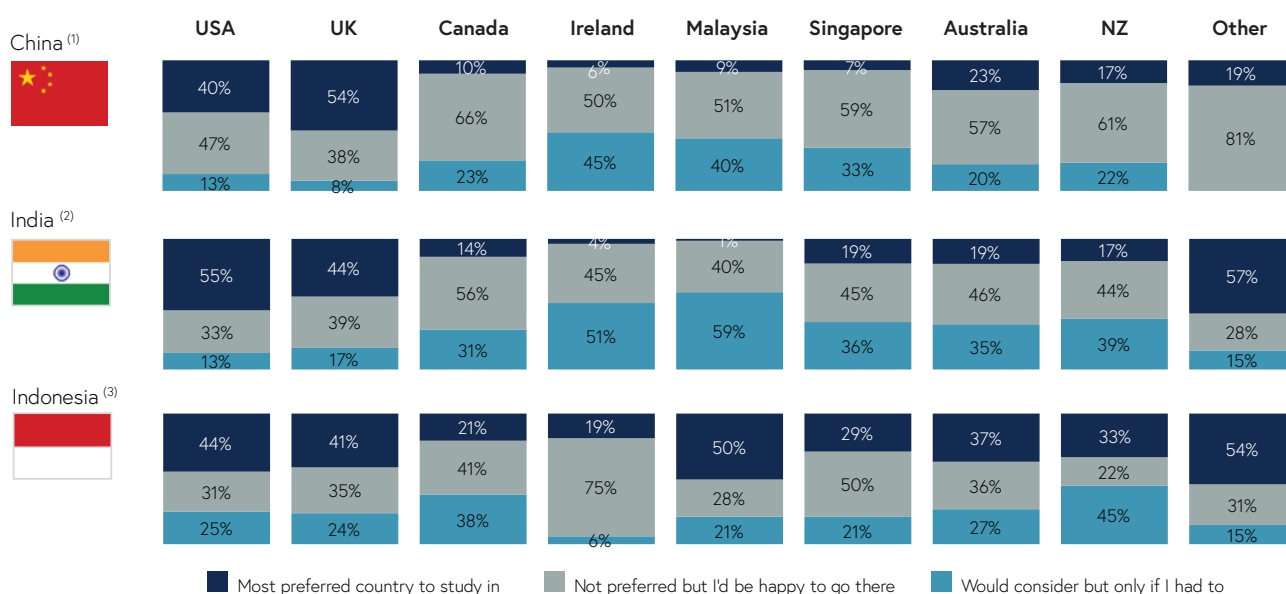
New Zealand's traditional competitors in the international education market are Australia, the United States, the United Kingdom and Canada. Competition has increased over the last 20 years, mainly driven by the worldwide trend to reduce government funding for tertiary education.

COVID-19 has also led to educational institutions relying on international students to lost significant revenue, and New Zealand is already at a disadvantage given competitor countries have either opened borders, or communicated plans to open borders, in the case of Australia. It was noted in interviews many students were heading to Canada at the moment, given Australia and NZ's border closures.

New competitors have also emerged, such as most of Asia (particularly Malaysia, Hong Kong and Singapore), Turkey, the Middle East, Russia and Europe. Online delivery is also a competitor, for example, there are currently a greater number of international students studying for UK degrees outside of the UK than there are within it. (Education New Zealand, 2014, p.17).

In interviews, people spoke of the USA and UK being top tier international student destinations; and Canada, Australia and New Zealand being second tier. This is demonstrated in the figure below, although this also shows how preferences vary from market to market.

Figure 12: Degree of preference for English speaking study destination



Source: Education NZ, International Education Roadmap, 2014, p19

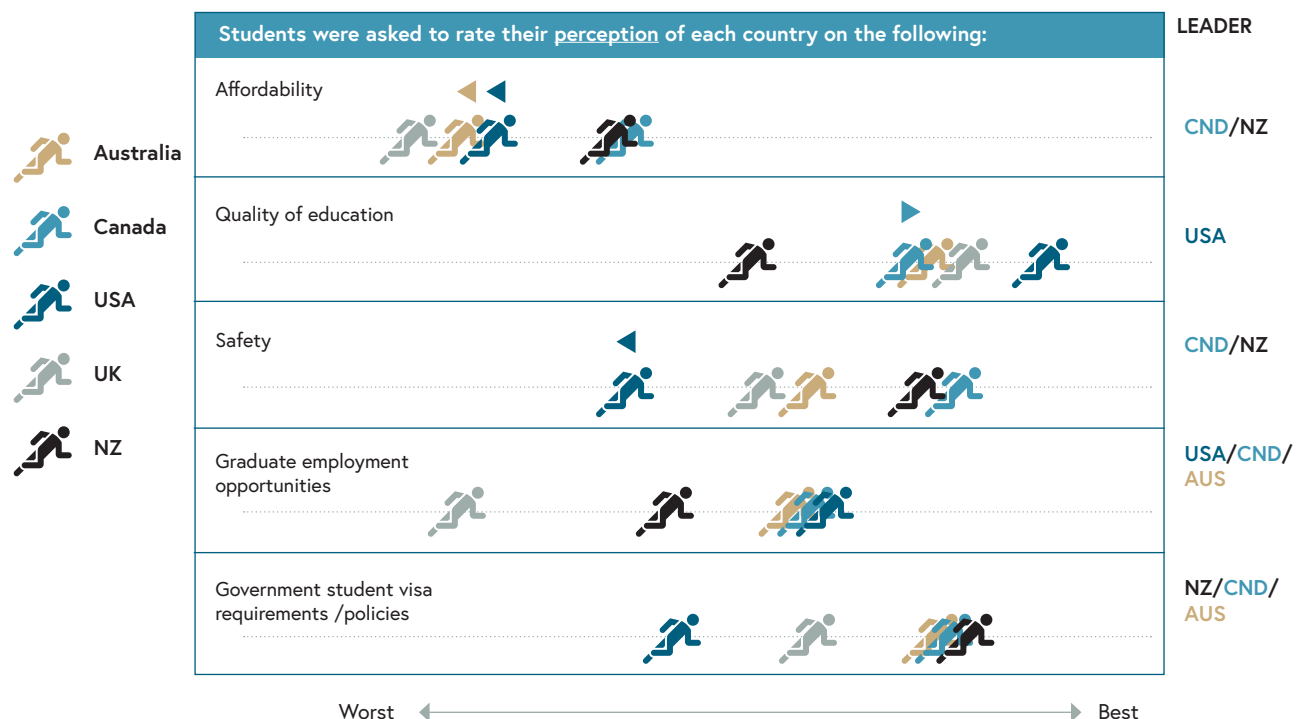
To summarise, the comparative advantages of New Zealand were:

- A safe English-speaking country;
- NCEA/ NZ school system providing more flexibility and variety of subject options (e.g., subjects such as graphic design, fashion design, marine biology) and a better work life balance for students than the home country;
- A strong academic teaching system - New Zealand ranks first out of 35 economies in having an education system, and teachers trained, to provide skills needed for the future;⁷
- The different experience e.g., the New Zealand environment and culture;
- Cost competitiveness (fees, living costs, degree of part-time work allowed while studying, and requirements of financing that Immigration NZ require);
- For some students, the outdoors/ extreme sport culture and Māori culture are unique selling points; and
- For tertiary study, the three-year post student work visa is longer than other countries, and New Zealand has a positive reputation regarding the process for gaining residency.

⁷ Worldwide Educating for the Future Index, The Economist Intelligence Unit. See <http://educatingforthefuture.economist.com>

This competitiveness is demonstrated in the figure below:

Figure 13: New Zealand's strengths



Source: IDP/Education NZ, International Education Roadmap, 2014, p.20

Factors working against NZ are:

- Perceptions that a smaller economy leads to more limited employment opportunities;
- While there is a highly ranked secondary school education system, NZ has lower ranked international universities compared to other competitor countries;
- Low awareness of the country (tending to get grouped in with Australia); and
- Perceptions as traditionally agriculture, with not much major industry or technology, so unlikely to come here to study those subjects.

TARANAKI'S CURRENT COMPETITIVE ADVANTAGES

KEY TAKE-OUTS: In the context of international secondary students choosing NZ, it was commented that Taranaki was often chosen due to the positive experience and wrap-around support provided to previous students (creating excellent word-of-mouth marketing). Parents often also preferred their child to have a more authentic NZ experience, outside of Auckland. In tertiary, it was more about the course being provided. Across both, all had built-up excellent relationships with agents, noting this is a "relationship business".

Secondary education

In Taranaki, for schools the unique selling points versus other NZ regions have been:

- Two state schools and three state integrated schools with good academic results that offer single sex hostel accommodation (attractive to some Asian students), with some facilities of a very high standard (commented that Hawkes Bay is the only other region with this).
- A more authentic New Zealand experience outside NZ urban areas. Also, less distractions for students, and more likely that students will engage with other non-international students (as less of them).
- Good experiences from previous students, supported by strong wrap-around support from international directors and other support staff.
- A number of migrant communities in the region (Indian, Chinese, Filipino, Korean, Japanese, Vietnamese and Thai).
- Strong connections and relationships formed by international staff over the years, noting that this is a "relationship business". The region has a Memorandum of Understanding with OPEC (Thailand's Office of Private and Vocational Education), and a number of connections with specific schools in China, Japan, Chile etc.
- The uniqueness of offerings of specific schools. For example, the uniqueness of Spotswood College's curriculum was also mentioned, as well as the number of Brazilian students who attend who are attracted to Taranaki's surf. The Outdoor Education offering and hockey programme at Boy's High was mentioned as attractive to German students.
- The relaxed nature, and beautiful environment with beaches, Maunga and art (although some other NZ regions are also strong in this area).
- Some schools set a more inclusive fee, meaning no hidden extra charges (although comment that this may come across as being initially more expensive).

Taranaki also has some uniqueness in the Maunga and Māori culture, although this did not feature highly in interviews.

Some disadvantages of Taranaki are:

- Many students want to live in big cities
- There is currently no ESOL centre, meaning students have to travel to other places to study this in their holidays. (Note that this could be addressed by WITT and PIHMS offering pre-enrolment courses. The PIHMS IPass model may also allow for high school English preparation before leaving and provide an online option.)
- The need to get a domestic flight from Auckland
- Low awareness of the region (e.g., via tourism), although it was noted anecdotally that the region was growing in interest among Chinese as a travel destination.

Tertiary education

It is clear the programme offering for tertiary education is crucial in attracting students. They are aware of Immigration NZ's direction and are increasingly looking to complete Level 7 qualifications or higher. In 2021 the options offered across WITT and PIMS were:

- Graduate Diploma in Engineering (Highways) (WITT)
- Graduate Diploma in Hospitality Management (WITT)
- Bachelor of Applied Management (WITT), with a Postgraduate offering being developed
- Bachelor of Nursing (WITT)
- Bachelor of Engineering Technology (WITT)
- Bachelor of Applied Hospitality and Tourism Management (PIHMS)
- Master and Postgraduate Diploma in Hotel Management (PIHMS)

Students are also looking for strong pathways to work, and want to align with skills on the skills shortage list and where there are jobs in the region.

WITT and PIHMS have very strong international education offerings, with:

- Strong connections with agents in their target markets
- Student support, e.g., with finding accommodation, pick up from flight, help finding part time employment, orientation/ city tour, student support and activities.

In addition, Taranaki could also market that it has the highest GDP per capita in New Zealand, and is leading the country in taking a just transition to a low-emissions economy.

FUTURE TRENDS IN INTERNATIONAL EDUCATION MARKETS

KEY TAKE-OUTS: Trends include growing demand from countries such as Malaysia, Thailand and Indonesia, contrasted with flattening demand in China and Korea; as greater competition comes from Asia and online.

Students are expected to increasingly be interested in employability, future-focused subjects (e.g., sustainability, digital skills and entrepreneurialism); and seek more flexible products (e.g., packaging in travel, and 2+2 programmes). The rising cost of tertiary education and qualification escalation for first time jobs may increase interest in vocational options.

Key trends in international education to note are:

- As mentioned earlier, increasing competition from online and student source countries. This includes Malaysia, Taiwan, South Korea, Japan, Singapore and China, which are attracting growing numbers of international students in the Asian region. (Education NZ, 2014, p. 11)
- Growth in demand in countries where the middle classes are growing, with increased access to resources and expectations of access to quality education. Markets such as South Korea and China are expected to flatten, and growth is expected in countries such as Malaysia, Thailand, Indonesia, Philippines, Vietnam and India.
- Disaggregating course modules, shorter course options.
- Packaging of study with tourism, accommodation and travel.
- Demand for future-focused skills, including entrepreneurialism, innovation, digital literacy and creativity.
- Increasing student interest in sustainability e.g., the United Nations Sustainable Development Goals.
- Focus on employment-ready graduates, and the qualification escalation for a first full-time job (e.g., increasingly students seek Masters-level qualifications to differentiate themselves).
- Transnational Education, where host countries upgrade their education systems through international partnerships and offshore campuses.

Summary of markets assessment

The table below provides a summary of the extent to which various markets are currently active in Taranaki, and future trends and opportunities.

Market	Taranaki strength - Secondary	Taranaki strength - Tertiary	Forecasted LT growth demand?	Students likely to transition?	Overall rating	Commentary and opportunities
China	✓✓✓	✓✓✓	x	✓✓✓	✓✓✓	<ul style="list-style-type: none"> • Strong market for both secondary and tertiary, and highest number of transitioning students to study in Taranaki. Noted that there are a number of trends that suggest overall demand in China may flatten, however, also noted that there is much diversity in China and Taranaki only needs to seek a small number of students. • Reasons for flattening include increased competitive, (e.g. trend of sending students to international schools in China, rather than overseas), consideration that overseas education less of an advantage than it once was, and concern at increasing anti-Chinese sentiment. • Noted potential to do more 2+2 programmes with China institutions.
Vietnam	✓	✓✓	✓✓✓	✓✓	✓✓✓	<ul style="list-style-type: none"> • While few secondary school students in Taranaki, very strong growth in Auckland, Canterbury and Manawatu. Vietnamese students do go to regions for school and more likely to transition, shown by numbers at PIHMS (78 students in 2019). Challenge is that still traditional in preference to university rather than ITP, but PIHMS shows this can be overcome. • Still good sentiment and interest in NZ, but challenging right now with borders. • Agent and scholarship market • Demand forecasted to grow • Students keen for taster trials to experience NZ high school eg some schools offering virtual summer programmes online where they learn something academic or about NZ culture

Market	Taranaki strength - Secondary	Taranaki strength - Tertiary	Forecasted LT growth demand?	Students likely to transition?	Overall rating	Commentary and opportunities
Thailand	✓✓	✓	✓✓✓	✓	✓✓	<ul style="list-style-type: none"> • ENZ strategy in country to pathway more secondary students into the tertiary sector to create the critical mass required to raise awareness of New Zealand. • Suggested to target the secondary cities, where students less likely to want a big city • Thai school system inflexible, so NCEA has benefit of offering much more choice • Heavily agent based. ENZ been raising awareness with agents • Opportunity to promote vocational education more heavily, as high value on gaining job after study • Opportunity to create 6-month programme with short course and learning English. Study tour programmes also are popular
Korea	✓✓	✓✓	x	✓✓	✓✓	<ul style="list-style-type: none"> • Small secondary school market – benefit of high-quality hostels in Taranaki • Quite a few students have attended PIHMS (ranging from 9-72 students over the last 8 years)
Japan	✓✓✓	x	x	x	✓	<ul style="list-style-type: none"> • Japan focused on internationalisation and Government supportive to students learning overseas. • Most students come back to Japan for tertiary study. (Noted that easier pathway to competitive Japanese universities if you've studied overseas) • Destination marketing/ connection with tourism really important.
Germany	✓✓✓	x	x	x	✓	<ul style="list-style-type: none"> • Very strong secondary school market, and interest in sports (e.g., hockey) and outdoors. NCEA has many subjects students can't study in Germany • Many students really interested in sustainability – thinking about an experience with low carbon footprint • Expectation that students will have done a number of internships while studying, so opportunity to offer an internship programme for students to stay on for 6 months in Taranaki after school • ENZ currently negotiating arrangements for German academic exchange services for young academics • The few students in the ITP sector are mostly doing bachelors, mostly in the South Island and mostly in Business and Management.
India/ Nepal	x	✓✓✓	✓✓✓	x	✓	<ul style="list-style-type: none"> • Significant growth in Taranaki/ WITT in the last five years, and biggest international student population (40% students) • Strong relationships in WITT and PIHMS. • Nepal has also seen strong growth in since 2018, and was the 4th largest international student population in Taranaki in 2019 (and is 4th largest market for ITPs) • Only around 120 secondary school students in whole of NZ • Significant and growing demand, although susceptible to changes in immigration policies and English language criteria.

Market	Taranaki strength - Secondary	Taranaki strength - Tertiary	Forecasted LT growth demand?	Students likely to transition?	Overall rating	Commentary and opportunities
Philippines	x	✓	✓	✓✓	✓	<ul style="list-style-type: none"> Not really been a market for secondary or tertiary, although quite significant Filipino population in Taranaki. 5-14 students at WITT over the last 5 years. Filipino market is the 3rd largest in the ITP sector (after India and China). Good overlaps with subjects and Taranaki economy needs: Business, Management, Engineering, Healthcare (Nursing), IT & computer Science, Renewable Energy, Agriculture.
Pacific/ PNG	✓✓	✓	x	✓✓	✓	<ul style="list-style-type: none"> 5-15 secondary school students from Vanuatu, with 1-2 from Fiji and Micronesia. In 2018 and 2019 had ~5 students from PNG (only 42 in NZ). A few PNG students have attended WITT and PIHMS. Fiji is the 10th largest market for ITPs, and has had number of students transition to WITT and PIHMS. This may be due to students who win rugby scholarships at schools, then stay to play for the Taranaki Rugby Union, and study at WITT while they do this.
Brazil/ Chile	✓✓	x	✓	✓	✓	<ul style="list-style-type: none"> Spotswood College has strong links with Brazil and 15 students attended in 2018/2019, and Girls High has an exchange programme with Chile. A few Brazilian students have attended WITT and PIHMS in the last few years.
Other European	✓✓	x	x	x	✓	<ul style="list-style-type: none"> Some students from France, Switzerland. Across NZ, Italy and France are the 7th and 8th most popular markets in secondary schools. Noted potential of Norway, as only Scandinavian country where students have a 6-month window for overseas study
USA	x	x	x	x	x	<ul style="list-style-type: none"> Some opportunity with rising costs of gaining a degree. Community colleges are much cheaper, but currently unable to offer degrees. Potential to form linkages with Te Pūkenga where students' complete degree in NZ Student interest in authentic experiences, entrepreneurship, climate change/ sustainability, social justice (diversity/ equity/ inclusion), indigenous rights/ development Could connect with regions with similar climate change transition processes or leading new energy (e.g., California, Texas or Nevada) Some existing links with NZ universities e.g., AUT has connection with Vermont University, AFS links with Massey University. Taranaki students have gone to US universities on sports scholarships. ENZ focus on raising awareness of NZ by working with High Schools
Russia	x	✓	x	x	x	<ul style="list-style-type: none"> Around 10-30 students have studied at PIHMS each year. Russia is the 8th largest market for ITPs.

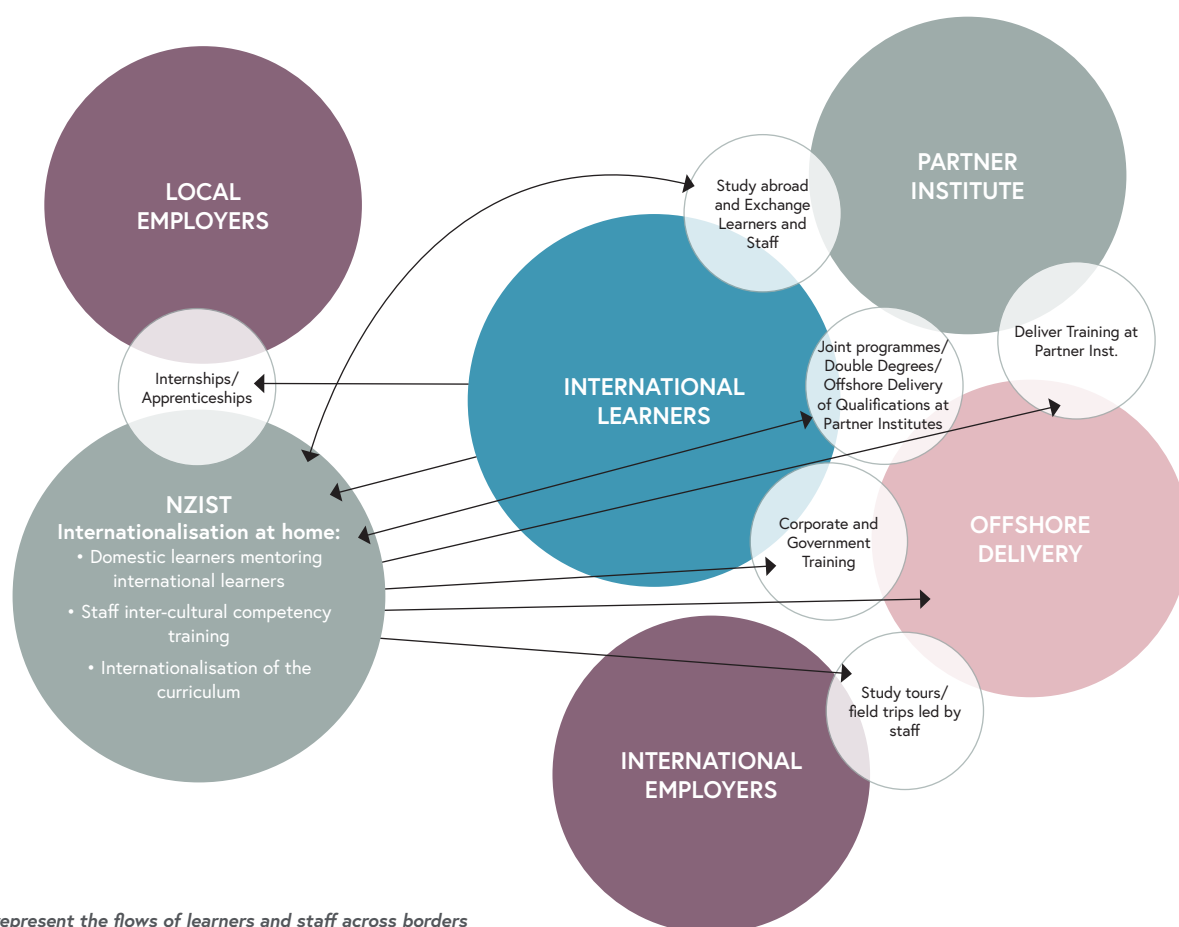
FUTURE DIRECTION OF TE PŪKENGĀ

KEY TAKE-OUTS: The creation of Te Pūkenga, and its chosen direction will have a significant impact on secondary to tertiary transitions in Taranaki. With the increased centralisation and unified branding, it will be important that Taranaki carves out niche areas. Work to establish Te Pūkenga suggested that its direction is focused on internationalisation – i.e., gaining the whole value from international relationships, rather than mostly revenue generation. This suggests that forming strong regional/ institutional connections will be very important e.g., with students travelling both ways and sharing knowledge.

All NZ's ITPs are being merged into one institution from 1 January 2023 – Te Pūkenga. Te Pūkenga is still developing its operating model, and so its approach to international education, and the impact this will have on WITT is relatively unknown at this stage. It is assumed that the approach will reflect the key principles of Te Pūkenga, such as putting learners and their whānau at the centre and honouring and upholding Te Tiriti o Waitangi.

The Establishment Board of Te Pūkenga (called NZIST at the time) and Minister for Education commissioned a working group report on internationalisation in 2019. Internationalisation was defined as going beyond the revenue benefit of international education, and seeking the full benefits across the institution. This is demonstrated in the report in the diagram below.

Figure 14: Internationalisation – the International Mobility of Learners and Staff



Source: New Zealand Institute of Skills and Technology Establishment Board. (2019). *Mobilising the New World: Report of the Internationalisation Working Group*

The Group also considered:

- "Value over volume" – how to build the brand of international delivery (e.g., regionally-based international delivery, possible 'whole of NZ experience') as well as supporting financial viability for Te Pūkenga.
- Channels already in place through subsidiaries and transitional ITOs; how and if to bring all international marketing approaches and offerings together.
- Analysis of what workforce capability exists and what development is needed.
- Programme and qualification development - existing and new.
- Ensuring consistency of support for learner wellbeing, and what best practice looks like.

The figure below summarises six priorities to underpin the success of internationalisation for Te Pūkenga (previously referred to as NZIST).

Figure 15: The six priorities to underpin the success of internationalisation for Te Pūkenga



Source: New Zealand Institute of Skills and Technology Establishment Board. (2019). *Mobilising the New World: Report of the Internationalisation Working Group*

The Working Group had several recommended actions under the six priority areas, however the revenue impact of border closures on Te Pūkenga has been substantial. It is predicted that subsidiary international revenue in 2021 is likely to be \$110 million less than this revenue in 2019 which was \$169 million⁸, so the speed with which Te Pūkenga implements the recommendations may be fairly slow.

Te Pūkenga also may also have some ability to spread international students to regional areas, to help support those institutions, and meet regional skill shortages. This could be an opportunity.

FutureLearn:

Te Pūkenga is also currently partnering with Education New Zealand to deliver a pilot on FutureLearn, an online platform offering courses of learning. This will showcase a selection of taster courses from New Zealand providers to worldwide online learners, under the ENZ national Think New brand umbrella.

As part of the pilot, ENZ is exploring aligning New Zealand education offerings to a global cause-based theme, in this instance, sustainability and regenerative practices. Insights from the pilot will inform ENZ's work to support the education sector.⁹

FUTURE DIRECTION OF NEW ZEALAND IMMIGRATION POLICY

Immigration settings have a significant impact on international students, particularly in the tertiary sector. Immigration NZ reviewed international student post-study visa work rights in 2018 and made a number of changes.

It had also developed a Pathway Student Visa pilot from 2015 and indicated this may be made a permanent visa category. In the pilot the visa was valid for up to five years for a student to study up to three courses on a single visa across different education providers.

The Productivity Commission has recently released its preliminary findings and recommendations from its immigration inquiry. This included that the Government should assess NZ's absorptive capacity for immigration, and set clear policy goals. It also raised the idea that post-study work rights and residence pathways could be prioritised for graduates in fields of significance to New Zealand's frontier firms.

SKILLS NEEDS IN TARANAKI

KEY TAKE-OUTS: Current regional skills shortages are in IT, health and social services, agriculture, trades, education, engineering and hospitality. These are all expected to grow in the future, as well as in professional services and management/commerce. The regional transition plan, Taranaki 2050, considers future growth areas in the areas of low emissions energy (e.g., offshore wind, hydrogen), food and fibres, future-focused areas (e.g., digital related) and biodiversity.

Considering the requirement to carve out niche areas and support future regional economic needs, this section considers current Taranaki skills gaps, and looks forward to where future niche areas may arise. It considers existing regional development plans such as Tapuae Roa, Taranaki 2050 and Te Aranga o Taranaki, and the work of the Taranaki Regional Skills Leadership Group.

Current skills gaps

Taranaki currently has large shortages in the following areas: IT, Healthcare, professional services, agriculture, and trades and construction and infrastructure.

The current Taranaki skills shortage list with Immigration New Zealand is below. This is where skilled workers are required but there are no New Zealand citizens or residents to take up the positions¹⁰:

- **Agriculture and forestry:** Apiarist, arborist, beef cattle manager, dairy cattle manager, dairy cattle farmer, market gardener, pig farmer
- **Education:** Early childhood teacher, primary school teacher, post-doctoral fellow, secondary school teacher, university lecturer
- **Engineering:** Mechanical engineering draughtsperson
- **Health and social services:** Anaesthetic technician, medical technician, midwife, resident medical officer, GP/ physician
- **Recreation, hospitality and tourism:** Jockey, skydive tandem master, snowsport instructor
- **Trades:** Baker, composite technician, electronic equipment worker, foundry moulder, metal fabricator, metal machinist, motor mechanic, panel beater, plastics technician, sheetmetal worker, vehicle painter.

⁸ <https://xn--tepkenga-szb.ac.nz/news/category/News/mobilising-for-internationalisation-in-a-new-world>

⁹ <https://xn--tepkenga-szb.ac.nz/news/category/News/new-blog-post-3>

¹⁰ List from <https://skillshortages.immigration.govt.nz/>, as at 5 November 2021.

Future skills gaps

The table below forecasts the top 10 growth industries in Taranaki between 2019-2025. In summary, the top five growth areas are in health care and social assistance, education and training, professional, scientific and technical services, construction services and other services.

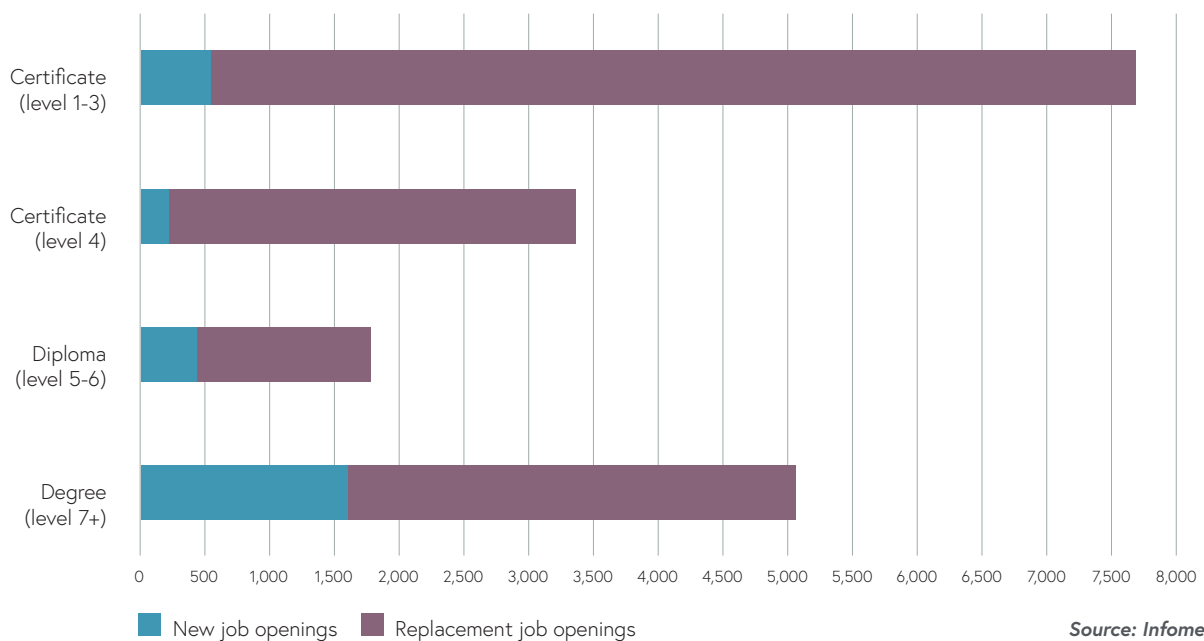
Table 4: Forecast of top 10 growth industries in Taranaki region 2019-2025

Industry	Employment 2019	Māori share %	JOB OPENINGS IN TARANAKI REGION		
			New	Replacement	Total
Health Care & Social Assistance	5,702	11.5	360	1,450	1,810
Education & Training	4,090	11.0	210	961	1,171
Professional, Scientific & Tech Services	3,709	5.6	294	794	1,088
Construction Services	3,240	12.3	233	842	1,075
Other Services	2,565	8.8	160	642	802
Administrative & Support Services	2,079	17.5	227	547	774
Meat & Meat Product Manufacturing	2,208	38.3	33	711	744
Dairy Product Manufacturing	1,839	22.8	236	493	729
Dairy Cattle Farming	3,350	8.1	-23	750	727
Other Store & Non Store Retailing	2,625	9.9	-60	716	656

Source: Infometrics

The graph below shows the qualification levels that employers are likely to require between 2019 and 2025 in Taranaki. These are mainly in levels 1-3 and level 7 and above.

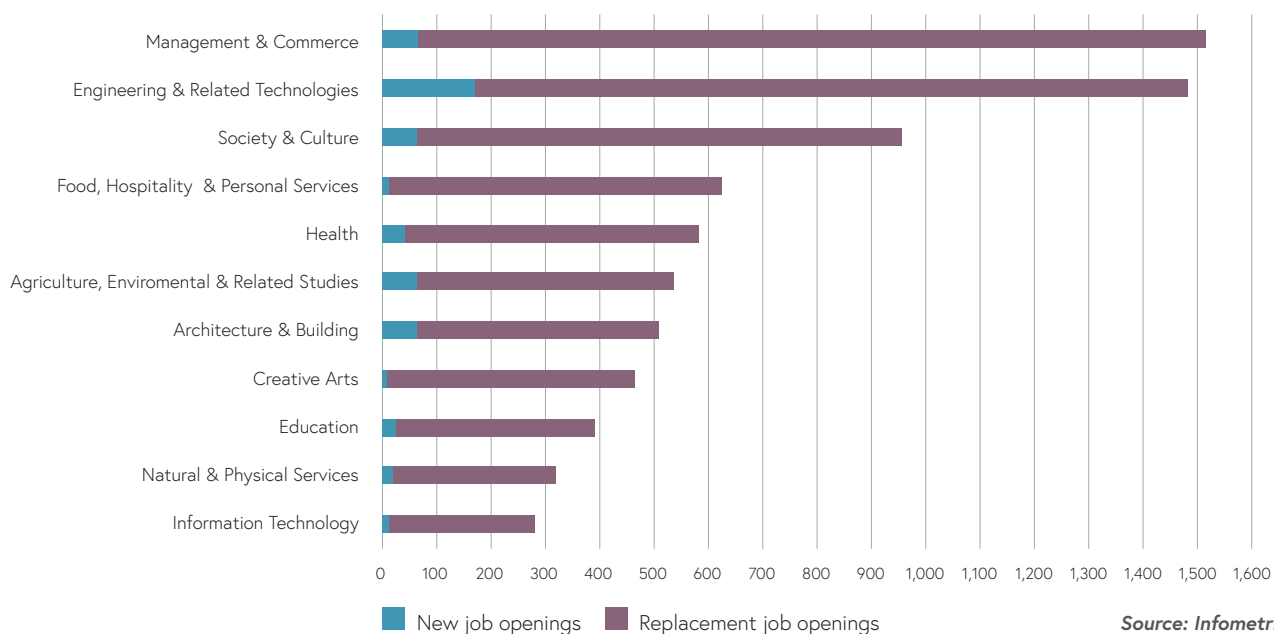
Figure 16: Forecast total job openings in Taranaki region between 2019 and 2025 by qualifications required by employers





WITT culinary student in kitchen

Figure 17: Forecast certificate (level 1-3) job openings in Taranaki between 2019 and 2025 by field of study required by employers





Students on a tour around Taranaki

Possible new strategic direction

KEY TAKE-OUTS: Pulling all the information above together, there is a potential value proposition in a whole-of-region international education approach that benefits schools, tertiary institutions and the needs of the regional economy.

Pulling this information together and considering a whole-of-region international education approach that benefits schools, tertiary institutions and the needs of the regional economy, the following is pertinent:

- The Government's direction is looking for **value over volume**. Value could mean students staying here for secondary and tertiary study, meeting regional skills needs, and/or being alumni that bring overseas business and investment to Taranaki.
- With the **centralisation of international education in Institutes of Technology and Polytechnics (ITPs)**

via Te Pūkenga, there is likely to need to be some degree of **niche offering to distinguish a region** on the ITP network. Taranaki has a regional development strategy focused on a low-emissions future with high-value sectors delivering prosperity and sustainability. The region's strengths include energy, food and fibres, engineering, agri-chemicals, biodiversity, manufacturing.

- Te Pūkenga has signalled the importance of international education being part of a wider internationalisation of ITPs to gain benefits beyond revenue generation, with **partnerships with other institutions, student exchanges and business links**. This signals specific links with schools, businesses and tertiary institutions in regions that align with Taranaki's strengths.
- The **cost of university education is increasing** and students increasingly weigh up the cost of a qualification, versus the impact of their employment prospects. The university graduate job market is much more competitive, with many international students feeling they need Masters-level qualifications to compete. **Vocational education** is often less expensive and provides just as much, or more chance of getting a job straight after study. This is a **compelling sales proposition**, especially with the uncertainty of COVID-19. In addition, Te Pūkenga also offers a new branding opportunity, becoming the 35th largest tertiary institute in the world.

A potential long-term overall regional direction for international education

KEY TAKE-OUTS: A whole-of-region approach would require specialisation in areas that link to the Taranaki economy, and build on existing relationships. A high-level review of where there may be existing linkages has been completed to show how this might work.

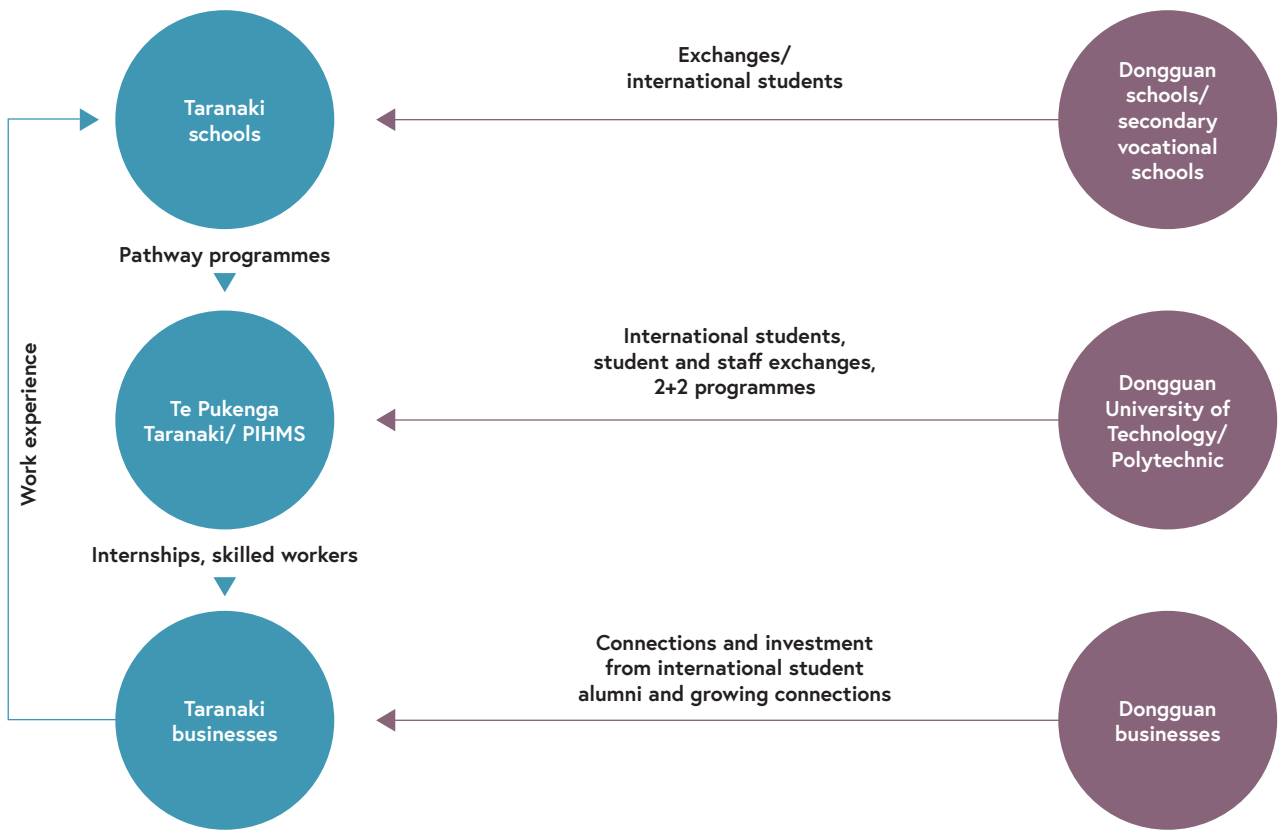
If a whole-of-region approach is applied to secondary and tertiary education, and the regional economy, the direction shifts to joined-up connections to the region's future, focused on specialised areas. For example, Venture Taranaki's work on potential niche sectors has identified areas such as new energy, sustainability and biodiversity, food-related, agri-chemicals and manufacturing in wood products, metal and equipment as examples of high potential specialisms.

The region already has developed a wide-range of relationships. For example, across school exchanges, local government sister cities programmes, business connections and tertiary connections with other institutes and from tutor relationships.

The diagram below illustrates what this could look like. For example, Taranaki could develop a specialisation in low-emissions energy and sustainability, and have partnerships with Dongguan, China (electrical engineering and manufacturing); Vestland, Norway (offshore wind); Northern California (new energy IT and manufacturing); and Fukushima, Japan (Hydrogen).

Figure 18 is an illustration of what this could look like with Dongguan, China.

Figure 18: Illustration of whole-of-region model with Dongguan, China



The unique sales proposition to attract international students could become:

- **For schools:** Able to market specialised pathway programmes to tertiary study, with options to gain work experience and undertake some study at tertiary institutes while at school. These skills could link with jobs in Taranaki and the students' home region.
- **For WITT/ Te Pūkenga:** Builds links with other institutes to grow specialism, benefiting quality of education, opportunity for 2+2 programmes and applied research. Opportunities for student and teacher exchange both ways. For example, students studying the Bachelor of Applied Engineering could study a semester or year in Norway or Japan, or those doing the Bachelor of Applied Management could do the same in China.
- **For PIHMS:** Builds on already excellent reputation and specialisation by growing reputation of the region in hotel management, sustainable tourism and hospitality.
- **For Taranaki businesses:** Access to skills needed, increased links to businesses in region, greater awareness of Taranaki, potential connections and investment by international alumni.

In addition, links could be built or strengthened across local government, institutions such as Ara Ake and other key regional groups.

The research has considered where these areas could be by looking at existing relationships across education, business and local government; and competitive strengths in regions/ markets. Niche areas and possible sectors are discussed below:

1. Low-emissions energy

- a. WITT is looking to create a centre of excellence in energy and engineering. It is also looking at micro-credentials related to environmental sustainability. This builds on Taranaki's strong energy and engineering skill sets, and regional interest in a transition to a low-emission's future.
- b. Education NZ has developed a booklet on "Studying sustainability on Aotearoa New Zealand"¹¹. Courses listed are:
 - i. Universities (such as Massey, Waikato, Victoria, Canterbury, Otago and Lincoln) provide bachelors and masters covering environmental studies/ science/ management/planning/engineering/ sustainability, business sustainability, ecology and conservation.
 - ii. ITP offerings include Ara providing a bachelor of sustainability and outdoor education and a Master in Sustainable Practice, and Nelson Marlborough offering a postgraduate diploma in sustainable aquaculture.

c. Possible regions to link with are:

- i. **Dongguan, China:** Francis Douglas and Sacred Heart had been doing exchanges with a Middle School pre-COVID-19. There may be regional linkages with manufacturing in the region. (It is also worth noting that Nexan Olex NZ manufactures cables in Kunming, China and further linkages with this area are discussed below.)
- ii. **Vestland, Norway** (offshore wind): This area of Norway is the centre of the Norwegian Offshore Wind Cluster, which aims to be the be the strongest supply chain for floating offshore wind world-wide. Offshore wind development is an area that Taranaki is very interested in. High school students in Norway have a window where they can study abroad for six months, so may be potential to explore this.
- iii. **Northern California** (new energy IT and manufacturing): There are a range of new energy clusters across the USA, e.g., Tesla has factories in California, Nevada, Buffalo, Austin and Michigan. California is home to a range of technology companies and also closer geographically to New Zealand. While Taranaki does not have much industry in this area at the moment, it may be an area to further explore. The USA Community College system is unable to award degrees, so there may be opportunities to form 2+2 type programmes, where students finish the last two years of study at WITT to gain a degree.
- iv. **Fukushima, Japan** (Hydrogen): Taranaki is developing a range of interests in hydrogen technology. Japan has signalled a strong interest in hydrogen, developing a national hydrogen framework and several strategic documents. While activity is happening around the country, a major hydrogen research complex is based in Fukushima Prefecture. The Fukushima Hydrogen Energy Research Field (FH2R) opened in March 2020.

2. Food and fibres

- a. In interviews it was commented that Asian countries perceive New Zealand as being largely agricultural, and given Taranaki has a very strong dairy industry, this is probably the perception of the region as well.
- b. Taranaki leads the way in a number of respects in dairy, for example, in riparian fencing and planting and productivity rates. In addition, agriculture and related manufacturing and services is a significant employer in the region, and this is likely to be the case going forward. There are also a number of areas of skills needs now and in the future. WITT is looking to develop more courses in this area to support future skills needs.
- c. In 2019 Venture Taranaki organised a programme with the Japanese government to host secondary students interested in agriculture.

11 Available at <https://www.studywithnewzealand.govt.nz/studying-sustainability-in-aotearoa-new-zealand>

d. Possible regions to link with are:

- i. **Harbin, Northeast China:** South Taranaki District Council has had a sister city relationship since 2005. The region has around ~10 million people. The Council was scheduled to host the first delegation of students and staff from the Harbin College of Horticulture and Landscape Architecture of Northeast Agricultural University (NEAU), although this had to be postponed.

3. Hotel management, hospitality and sustainable tourism

- a. PIHMS already specialises in this area, with highly developed relationships with industry and ability for students to have paid industry placements during their course. Its main competition is the Queenstown Resort College, with campuses in Queenstown and Tai Tokerau. A number of ITPs also offer bachelors or diplomas in Tourism and Hotel Management (e.g., SIT, Otago, Ara, WINTEC).
- b. WITT currently offers hospitality management and is considering its course offerings in sustainable tourism in conjunction with TOPEC.
- c. A strategic approach could build on PIHMS specialism, and link to tourism studies in schools or TOPECs work in outdoor education and NZ and Taranaki's schools' high performance in outdoor activities e.g. adventure racing. This could target European markets with an interest in tourism.

d. Possible regions to link with are:

- i. **Kunming, China:** NPDC sister city since 2003. The horticulture sector in Kunming and Taranaki has close ties. The Kunming Botanical Institute and Pukeiti Rhododendron Trust established a relationship over a decade ago. Kunming Number 15 Middle School and Inglewood High School exchange students who live with host families and attend classes at their host school. Some Kunming students, who have experienced life in Inglewood, have returned to New Plymouth to study at the Pacific International Hotel Management School.
- ii. **Mishima, Japan:** NPDC sister city since 1991. Every year New Plymouth families play host to junior high students from Mishima. In 2006 the inaugural Mishima-New Plymouth teaching programme started. Every two years, Mishima and New Plymouth send a teacher to spend up to a month in their sister city to observe learning and teaching practice in local schools and to interact with educational colleagues and the wider community.

4. Biodiversity, environmental management and sustainability

- a. There is a large investment going into biodiversity in the region, with Taranaki Tūrangā - Towards Predator-Free Taranaki. Jobs for Nature has also invested in a number of cadets, and there is strong iwi interest in conservation and biodiversity.
- b. Tupu ā nuku is a Taranaki environmental workforce development programme led by Ngāti Maru, with a joined-up approach to pathways, education, pastoral care, employment and iwi leadership. WITT also offers courses, and Te Pūkenga is in discussions with the Department of Conservation about a Conservation Academy.
- c. The Provincial Growth Fund and NEXT Foundation supported the development of a business model and economic impact report into a Taranaki Biodiversity Institute.
- d. There would be a range of possible regions to explore, depending on the focus. Examples could be:
 - i. **Chile:** Predator Free 2050 Ltd recently briefed the Chilean Environment Ministry to support their beaver eradication programme, and New Plymouth Girls High School has a student exchange programme with Chile.
 - ii. **North America:** Predator Free 2050 also gave a keynote address to the 2021 North American Invasive Species Forum, and there may be opportunities to work with particular regions considering pest eradication in large-scale urban environments. Ngā iwi o Taranaki may also have linkages with indigenous groups in North America.

5. Infrastructure, highways and civil engineering

- a. WITT has the New Zealand Institute for Highways and Technology, and is developing an infrastructure park. It's expected there'll be significant growth in demand for these skills in the next five years.
- b. Possible regions to link with are:
 - i. **Russia:** Technix has recently created a portable manufacturing plant to go to one of the world's largest bitumen producers, Gazpromneft Bitumen Materials LLC, in Russia. PIHMS has developed Russia as one of its main markets.
 - ii. **Indonesia:** A Taranaki engineering consultancy is leading a large-scale project here.



Seachange Survey students investigating rock pools

5. Conclusions

Pre-COVID-19, Taranaki had been performing well in international education at both secondary and tertiary levels, with steady growth to 2019. Students at secondary schools receive high levels of support, PIHMS offers a unique sales proposition, and WITT has transformed its international education offering and has been rapidly expanding.

It is clear there is not much overlap between secondary and tertiary markets at the moment, with around 20% of students transitioning to WITT or PIHMS between 2009 and 2019. However, students are increasingly recognising that universities can be an expensive option with no guarantee of a job at the end. On the other hand, vocational education can offer an excellent student experience, with significant employability afterwards.

WITT's MoU's with Victoria and Canterbury Universities also should lead to offer exciting new opportunities for students to stay in the region for their first year of study.

In the research there were some compelling student stories, where it was clear that staff had gone above and beyond to ensure their international students had the best opportunities that worked with their strengths.

Looking forward, it is clear the long-term direction is changing. There are many unknowns in what will happen with border restrictions under COVID-19, Immigration New Zealand and Te Pūkenga's direction. However, this pause provides an opportunity to think about what a more joined-up, strategic and specialised approach could look like for Taranaki.

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7. Appendices

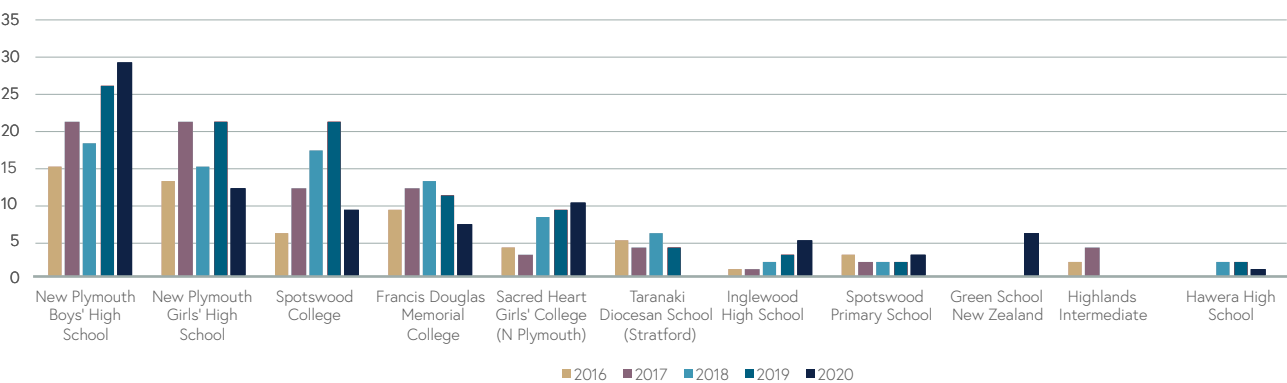
International students in Taranaki

This appendix provides more detail on the characteristics of international students in Taranaki across schools, the Western Institute of Technology at Taranaki (WITT) and the Pacific International Hotel Management School (PIHMS).

SCHOOLS

School type: The vast majority of students are in secondary schools (93% in 2017). This is dominated by the five high schools in New Plymouth, as shown below.

Figure 19: International students across Taranaki secondary schools (2016 – 2020)

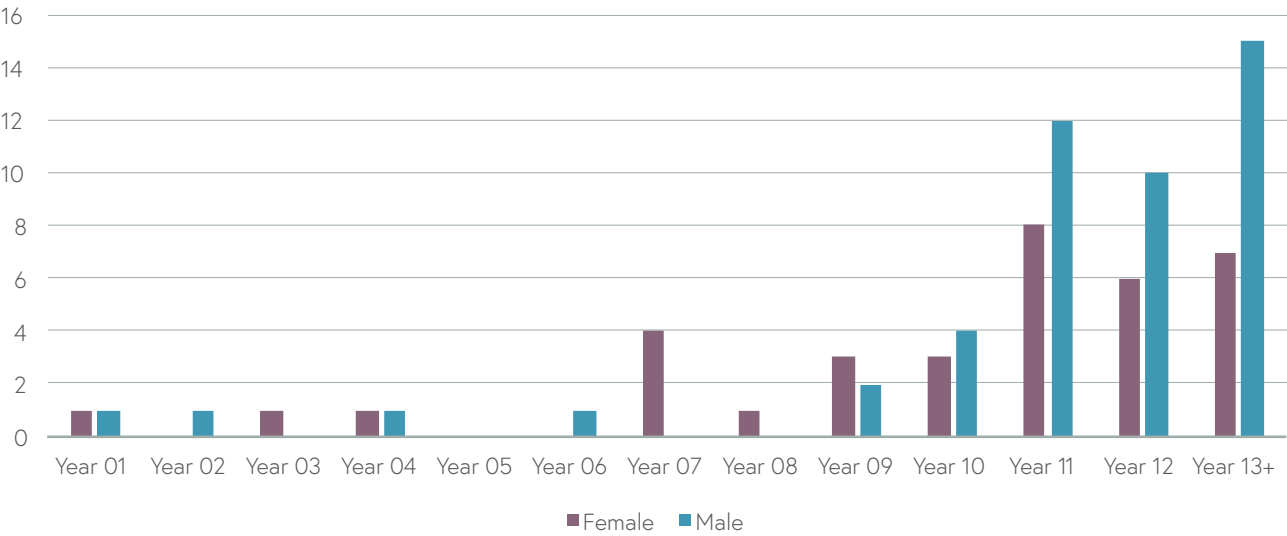


WITT Civil engineering students and teacher



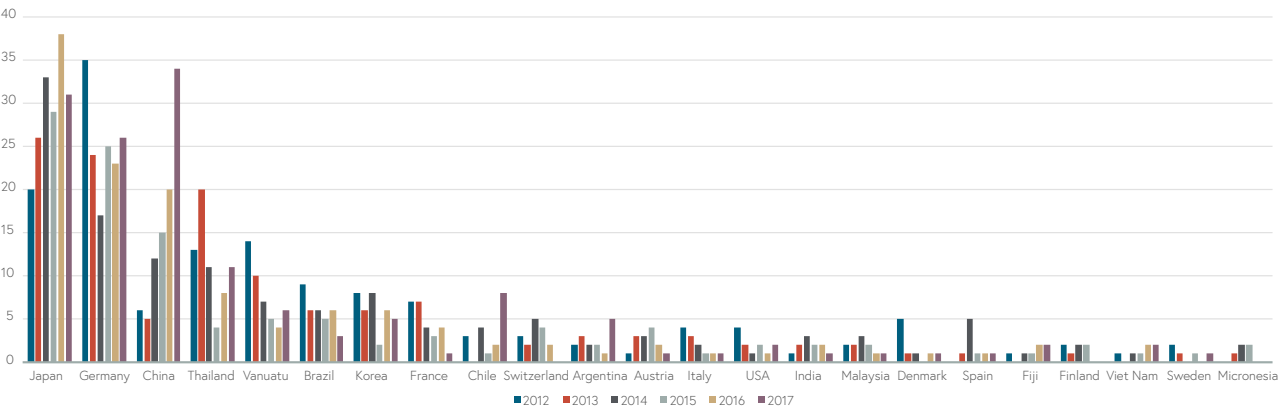
Age and gender: Years 11 -13 dominated in 2021, with a greater proportion of male students.

Figure 20: International students in Taranaki schools by age and gender (2021)



Markets: Students have come from a wide range of markets, with Japan, Germany and China dominating between 2012 and 2017.

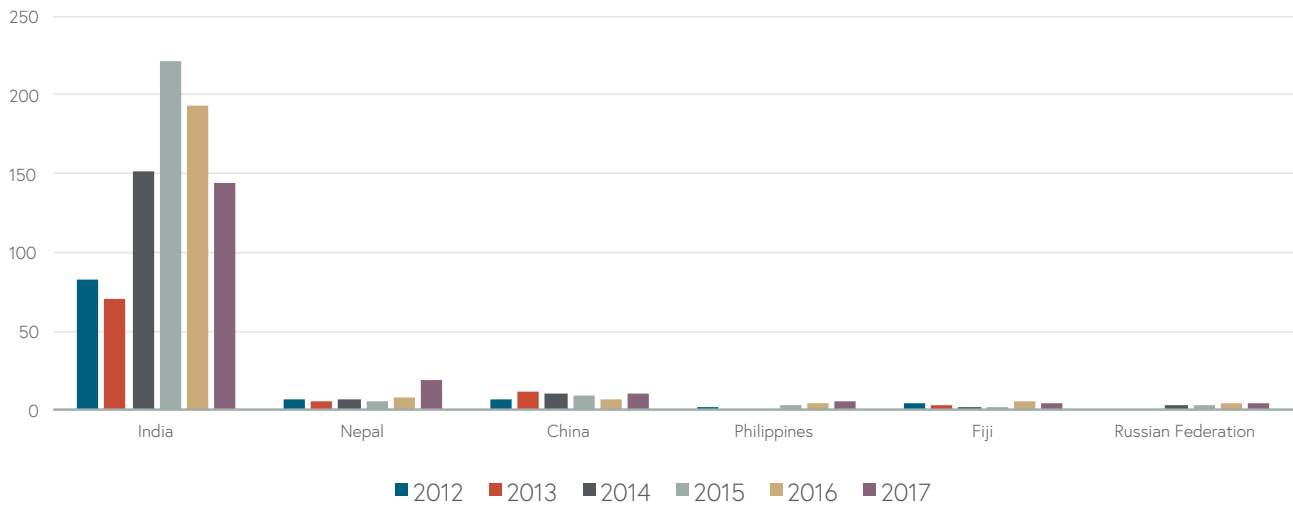
Figure 21: Citizenship of Taranaki international school students (2012-2017)



WESTERN INSTITUTE OF TECHNOLOGY AT TARANAKI

Markets: Students are dominated by India, with 76% of students coming from India between 2012 and 2017. The next largest markets were China and Nepal (5% and 4% respectively).

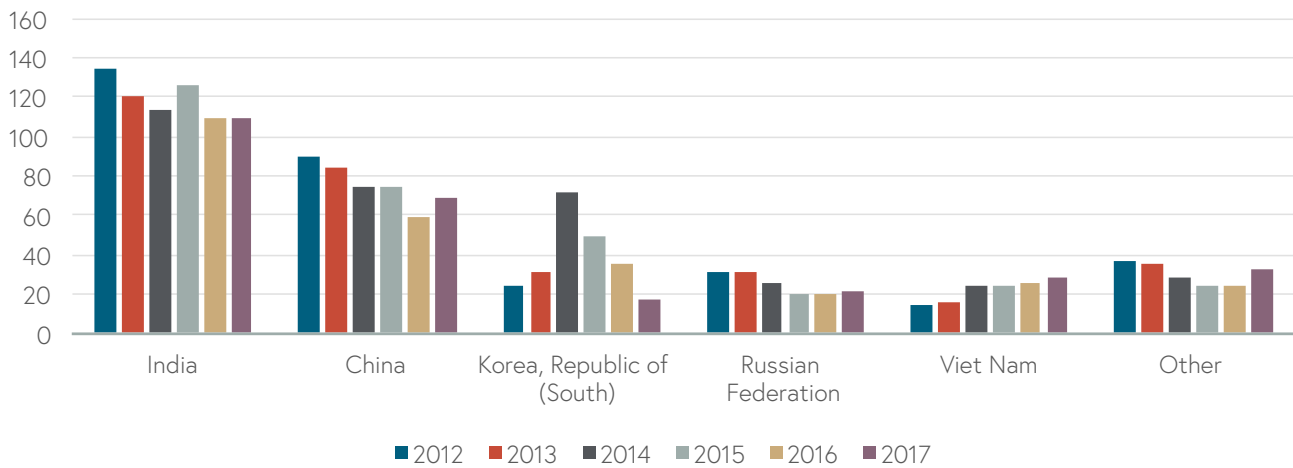
Figure 22: Citizenship of WITT international students (2012-2017)



PRIVATE TRAINING ESTABLISHMENTS: PACIFIC INTERNATIONAL HOTEL MANAGEMENT SCHOOL

Markets: Students are spread across five main markets, dominated by India and China.

Figure 23: Citizenship of PIHMS international students (2012-2017)



Focus group research in 2017

INTRODUCTION

Focus group research was undertaken in 2017 with 25 international students in Taranaki. The aims were to gain a better understanding of international student perspectives on studying in Taranaki; and inform initiatives on growing international student numbers in the region.

SECONDARY SCHOOL STUDENTS

Key characteristics of the students in the focus groups were:

- Independent
- Want to take opportunities to improve
- Have a plan
- Want to improve their English
- Want to experience something different
- Males tend to be more interested in sport
- Under 19 years old

In **choosing to study overseas:**

- The primary reason was to improve their English competency, and the secondary reason was experiencing something different.
- Overseas study is a requirement for some schools
- There are differences between countries and gender as to what they are looking for in international study destinations
- Family and friends were the most important influencers in choosing New Zealand as a study destination.
- Australia is too hot and has dangerous animals, Canada is too cold, America is perceived as not as welcoming and England is too close to Europe.
- The biggest concern for international students was around 'connecting' with locals when English is not your first language.

In **choosing to study in Taranaki:**

- There was no single reason why students choose to study in Taranaki. Rather it was a range of factors.
- Boys from Germany required a boys' school with hostel and the opportunity to play sport.
- Girls from Germany were interested in fewer international students and the environment.

- The 'channel' e.g., AFS, Rotary etc is a significant influencer in student study destination decisions.
- Spotswood College website appeared welcoming to international students.
- Family and friends were the most common source of information to learn about Taranaki as a study destination.
- Social media was not cited as a channel to learn about Taranaki as a study destination.

On their experience in **Taranaki:**

- Students had few expectations before coming to Taranaki
- Schooling in New Zealand was more relaxed than their home country
- Locals are friendly
- Students are interested in understanding how the learning they are undertaking compares to their home country. They want to ensure they are progressing and not getting behind when they return to their home country.
- Students are interested in exploring new things and meeting people.
- Students who choose homestays want to choose the location and stay with people their own age.
- Students generally were open minded about things that were different and saw this as part of the experience
- Students enjoy the difference in schooling in NZ
- There were no significant issues identified by students

On **plans after study:**

- Most students were returning to schooling in their home countries
- Students indicating, they will continue on to university in New Zealand both came from China
- Only one student thought they might consider additional study in Taranaki when they complete their current studies
- 50% of the students are very likely to recommend Taranaki as a destination for study
- 52% of the students were interested in being ambassadors for Taranaki
- 48% of the students indicated an interest in continued participation in the international student initiative

TERTIARY STUDENTS

Key characteristics of the students in the focus groups were:

- Independent
- Motivated to improve their career prospects
- Wanted to improve their English
- Enjoyed an outdoor lifestyle
- Liked smaller cities
- Wanted to experience something different
- 20 - 30 years old.

In **choosing to study overseas**, students:

- Wanted to improve their English to improve their career prospects;
- Found international agents to be a very important part in the process;
- Had no common reason why they selected New Zealand as their study destination;
- Did not necessarily select New Zealand, it was more the country filled their criteria;
- Made their decision first, and then discussed it for approval;
- Found that families and friends were important influencers;
- Reported that missing home comforts, family and friends were their main concerns before travelling.

In **choosing to study in Taranaki**, students:

- Perceived Taranaki as having cheaper living expenses than larger cities;
- Enjoyed that Taranaki offered an outdoor, relaxed lifestyle in a smaller city;
- Reported that offering the right course is a key criteria for selecting a study destination;
- Found the 'like no other' website an important source of information;
- Found that information in English only is a barrier for countries where English is not the first language;
- Reported that information had to be sourced from multiple sites which can be confusing;
- Reported that international agents were viewed as the most important source of information for deciding to study in Taranaki.

On recommendations to **improve study in Taranaki**, students:

- Hoped to find work to support them while they were studying, but there was a perceived lack of job opportunities. Employment opportunities, particularly in their field of study, were also important;
- Found Taranaki people friendly and welcoming, and the environment was clean;
- Found the changeable Taranaki weather took some adjusting;
- If from large cities found New Plymouth small and 'boring'
- Would like to see more events in Taranaki, and gain a better understanding of the local culture.

On **plans after study**:

- Intend to leave Taranaki to find more job opportunities elsewhere
- 50% of students very likely to recommend Taranaki as a study destination
- Students indicated they would like to participate in promoting Taranaki as a study destination

RECOMMENDATIONS

The recommendations were:

- The primary motivator for students to travel overseas is the opportunity to improve their career prospects. Consider positioning studying in Taranaki as a great way to learn English and enhance career prospects
- Employment opportunities are highly important to students. Strengthening the work opportunities for international students would be well received
- Align courses with work opportunities locally
- Make promotional material available in multiple languages so influencers e.g., family/friends can access the information
- Taranaki doesn't appeal to all students. Promotions should show Taranaki's outdoor, relaxed lifestyle and small urban environment.
- Feature comparatively cheaper living expenses in promotions for Taranaki
- Promote and build good connections with international agents
- Consider ways to utilise international students in promoting Taranaki as a study destination.

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