

## Quarter Two Report Education New Zealand Manapou ki te Ao

1 October to 31 December 2024





## Table of Contents

<b>1. Executive Summary.....</b>	<b>3</b>
<b>2. Performance Measure Highlights.....</b>	<b>3</b>
Measures at risk of not being achieved.....	3
<b>3. Global Outlook.....</b>	<b>3</b>
<b>4. Operational Highlights .....</b>	<b>4</b>
Visa Applications .....	4
Goal 1 - Grow international student numbers.....	5
Goal 2 - Partner and connect .....	11
Goal 3 - Support sector capability development.....	13
Goal 4 - Optimise Education New Zealand .....	15
<b>5. Risk Management .....</b>	<b>16</b>
<b>6. Looking Forward.....</b>	<b>16</b>
<b>7. ENZ Financial Performance to 31 December 2024 .....</b>	<b>18</b>
Summary .....	19
<b>8. Manaaki NZ Scholarship Programme .....</b>	<b>20</b>
Summary .....	20



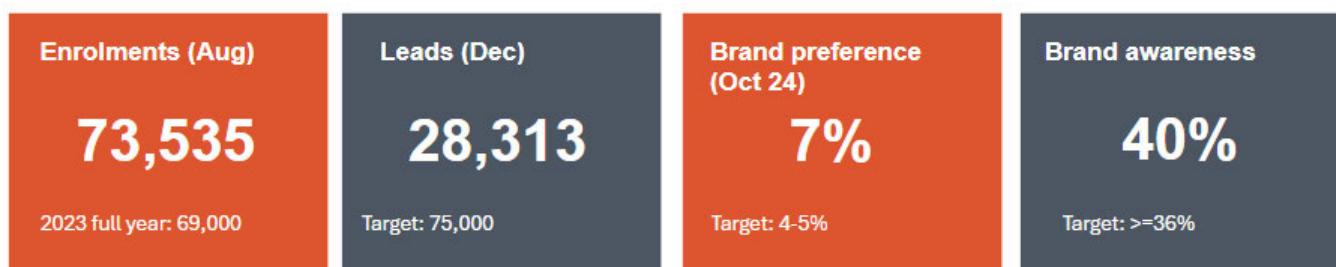
## 1. Executive Summary

Education New Zealand Manapou ki te Ao (ENZ) has continued to make good progress on delivering on the Government's ambition for the international education sector through coordinated actions across markets, digital platforms and brand positioning. Recent activities demonstrate tangible progress in raising global awareness of New Zealand as a high-quality education destination, effectively engaging with our international education partners offshore, and improving the efficiency and effectiveness within our organisation.

The key outcomes for this quarter include:

- There were 51,280 student visa holders in December 2024, up 10% from November, aligning with 2019 and 2023 patterns.
- Over the quarter, ENZ organised a wide range of in-market events and student fairs to increase awareness of New Zealand as a study destination.
- In November, ENZ's global awareness campaign 'Learn New Every Day' successfully contributed to a record 956,400 sessions on the Study with New Zealand website, up from the previous record of 777,000 achieved in October.
- Research on New Zealand's brand health was released showing that brand preference and unprompted awareness for New Zealand have both increased since the last survey in May 2024.
- The results of the October 2024 survey on New Zealanders perceptions of international education found that 72% of respondents believed that international education/international students benefit New Zealand and 77% said they would like to see more (41%) or the same (36%) number of international students studying here.

## 2. Performance Measure Highlights



### Measures at risk of not being achieved

There is currently one measure at risk of not being met:

1. **Diversify New Zealand Source Markets** – It is anticipated that China is likely to maintain its current market share of 35% (compared to a target of 34%) while India has a larger market share (14% compared to a target of 11%). Consequently, the share of other markets is unlikely to achieve its projected levels.

## 3. Global Outlook

New Zealand's competitors continued to tighten their international education and adjacent policy and operational settings. This included:

- Canada confirming its 2025 cap at 437,000 student permits. This is expected to reduce Canadian international student enrolments by 10% compared to the 2024 cap. In addition, Master's and PhD international students are now included in the cap, with 17% of places allocated to these students. Spouses of Master's degree international students will only receive work permit eligibility if the students programme is at least 16 months in duration.
- Canada also announced it will update its Post-Graduation Work Permit Programme. This update will include requiring all applicants to demonstrate a minimum French or English language proficiency and public college graduations will only be eligible for a Post Graduation Work Permit of up to three years if they graduate from a field of study linked to occupations in long-term shortage.
- Australia announced a new Ministerial Direction which came into effect on 19 December 2024. Ministerial Direction 111 sees visa processing prioritised for each provider until they receive 80% of their cap figure and replaced Ministerial Direction 107 which prioritised low risk education providers and source countries. The new Ministerial Direction was announced after the government was unable to pass legislation that would cap the number of new international students in Australia (ENZ ref 2425 – 169).

Education agents, financially impacted by the caps and falling confidence, are actively widening their market focus (refer to the below 'Agent appreciation events in Viet Nam'). As agents are a strategically important channel, a stronger partnership model and marketing support are planned to optimise the current environment.

These competitor policy settings present several opportunities to increase New Zealand's global brand preference and consequently lift the number of international students. At a marketing level, growth in our awareness and profile as a study destination continues to be a priority to realise this opportunity and compete against the increasing appeal of competitor markets such as Singapore, Germany, and transnational education within Asia. ENZ's research is used to deepen our understanding of the key drivers of influence.

## 4. Operational Highlights

### Visa Applications

#### Student Visa approvals:

In December 2024, 4,401 student **visa approvals** were granted.

- Year-to-date approval rate: 88%
- Visa decline rate reached 15% in December; lowest seen since March 2024
- Highest decline rates: NZIST/Te Pūkenga (34%), PTEs (28%), with universities being lower at 12% and schools the lowest at 2%
- **S 6 (a)**

#### S5 Valid Student Visa Holders:

- There were 51,280 student visa holders in December 2024, up 10% from November, aligning with 2019 and 2023 patterns
- December 2024 student visa holders were at 84% of December 2019 levels (61,167)
- 46% of student visa holders were enrolled at universities (23,545), mostly with the University of Auckland (7,785)
- China and India continued to remain significant markets for our sector, with 49% of all visa holders from China and India (down slightly from 50% in quarter one).

## Goal 1 - Grow international student numbers

Measure	Actual 2023/24	YTD (Q1&Q2) 2024/25	Target 2024/25	Comment
Maintain brand preference in targeted markets.	4%	7%	4% - 5%	The Global Brand Tracker, October 2024 reported a consolidated Top 1 Preference of 7%. A combination of policy changes in competitor markets, our global brand campaign and in-market activities have, in our opinion, led to this improvement.
Maintain or increase brand awareness (prompted)	36%	40%	>=36%	The Global Brand Tracker, October 2024 reported a consolidated Prompted Awareness of 40%. A combination of policy changes in competitor markets, our global brand campaign and in-market activities have, in our opinion, led to this improvement.
Increased number of students proactively gathering information about New Zealand as an international education destination	355,521	194,960	400,000	We are tracking ahead of the YTD target of 168,000 suggesting that our content and engagement on Study with New Zealand site has been effective.
Maintain or increase number of leads to providers (on-line and off-line) *	-*	28,313	75,000	We are trending slightly ahead of a YTD target of 27,313. We have a had stronger than anticipated first half of the year through higher digital engagement and stronger attendance at student fairs.
The economic contribution from international education is increased.	-	-	\$3.5 Bn	The International Student Expenditure Survey was completed in Q2. This is an important component of measuring the economic contribution. Progress on the Economic Value has slow due to external factors.
Increase in international student enrolments	-	73,535	85,000	Based on 2024 Jan-Aug enrolment numbers and if 2023 final term growth is observed in 2024 the sector will likely achieve the projection of 85,000.
Diversify New Zealand Source Markets**	35%	34%	35%	We anticipate China maintaining/slightly reducing its share, India increasing its share; consequently, other markets are unlikely to achieve the projection.
- China	11%	14%	11%	
- India	54%	52%	54%	

\*Note calculated on a different basis in 2023/24 (In 2023/24 we counted the direct enquiries from SWNZ to our providers. In 2024/25 we are counting the direct enquiries and the clicks from SWNZ through to provider websites.)

\*\*Note the targets were set before the final actual enrolment data was available for 2023/24.

## Supporting Prime Minister's Trade Delegation

ENZ worked alongside the Ministry of Foreign Affairs and Trade (MFAT) and New Zealand Trade and Enterprise (NZTE) to nominate education delegates for the Prime Minister's trade missions planned for the first quarter of 2025 to Viet Nam and India. ENZ identified participants across a range of sub-sectors who best align with the growth sectors in the respective markets including universities, Te Pūkenga/New Zealand Institute of Skills and Technology (NZIST), Private Training Establishments (PTEs) and EdTech. The following education deliverables were signed at the education event in Viet Nam.

New Zealand Provider	Key Deliverables
Auckland University of Technology	Memorandum of Understanding between AUT and Vietnam National University Ho Chi Minh City - University of Science on research collaboration activity in Computer Science and AI.

University of Auckland	Memorandum of Understanding between Ho Chi Minh City University of Technology and University of Auckland on expanding student mobility opportunities and establishing collaborative training programmes.
Massey University	Memorandum of Understanding between Massey University and Foreign Trade University to pursue a dual-degree arrangement at the Master's level.
Neurofrog	This is a national-level partnership between Neurofrog and Cộng Đồng Bầu with the goal of promoting New Zealand's leadership in the neuroscience of early education to all first-time parents in Viet Nam. The collaboration is expected to reach over 800,000 first-time parents each year, helping them access the 'First 1000 Days' curriculum through the Cộng Đồng Bầu Neurofrog application. This will position New Zealand education as the first choice in the minds of the next generation of Vietnamese and make it their top choice in the coming years, as they are introduced to the early education content from Cộng Đồng Bầu Neurofrog from birth.
Media Design School	Memorandum of Understanding between Media Design School (MDS), New Zealand and Hanoi University of Science and Technology, Viet Nam on the formation of a suitable pathway articulation for prospective students from Viet Nam transferring to MDS for degree completion.
Pacific International Hotel Management School	Memorandum of Understanding between Pacific International Hotel Management School (PIHMS) and Hai Phong Department of Education and Training. This collaboration includes scholarships, study abroad in New Zealand, skill-building programs, career orientation, and masterclasses. It also promotes cultural exchange through short-term experiential programs, joint conferences, shared learning, and research collaboration. These initiatives aim to enhance students' practical skills, strengthen educational ties, and foster mutual understanding.

## Global Brand Campaign - Learn New Every Day

The second phase of ENZ's Learn New Every Day global awareness campaign started on 24 September with continued focus on India, South Korea, Thailand, and Viet Nam, and the addition of Japan.

In November, the campaign successfully contributed to a record 956,400 sessions on the Study with New Zealand website, up from the previous record of 777,000 achieved in October. December saw 494,210 sessions<sup>1</sup> delivered with the reduction in numbers attributed to a pause in media spend this month. This was a planned phasing to manage the marketing spend more effectively and efficiently.

The total number of sessions for this quarter was 2.22 million bringing the total number for this financial year to 3.12 million. With such strong quarters 1 and 2 results, ENZ is well on its way to meeting its 2024/2025 target of 3.5 million sessions.

## Evolution of our global campaign

<sup>1</sup> A session is defined as a user interaction with the Study with New Zealand website that takes place within a given time frame.

Additional footage for the Learn New Every Day campaign was filmed in November following the Global Brand Health Tracking Research findings which identified a need to tailor our marketing messages further. This additional footage included 3D printing for markets interested in STEM subjects, a homestay, and a school learning environment for school markets. The new scenes were developed in discussion with our in-market teams. The new pieces of footage have been edited into the existing campaign assets.

## Global Brand Health Awareness research

ENZ ran its annual Global Brand Health Awareness research in October 2024, bringing it forward from April to align with, and inform, the business planning process<sup>2</sup>. The research surveyed 16-24 year olds from Brazil, China, India, Japan, South Korea, Thailand, the United States of America (USA) and Viet Nam and included parents that have a child aged 10-18 in China, South Korea, Thailand, and Viet Nam and are interested in their child studying internationally<sup>3</sup>.

Across all markets, the October 2024 research showed that:

- 44% of survey respondents identified that New Zealand was a study destination when shown a list of potential study destinations (known as “prompted awareness”). This is up from 36% in April and the 2023 result (37%)
- 11% ranked New Zealand as the top study destination that they would prefer to study at (known as “preference”). This has increased from 4% in April and 7% in 2023. The whole year, combining both the April and October research, is 7%<sup>4</sup>.

While awareness increased between April and October and in comparison to 2023, New Zealand continued to experience a lower prompted awareness and preference as a study destination compared to the USA, United Kingdom, Australia, and Canada.

This research continued to highlight the nuances of attracting prospective students from each of ENZ’s key markets. These nuances inform ENZ’s market-specific activities as we continue to build greater awareness and preference to achieve the Government’s goal for doubling export revenue from international education.

## Student Activities and Fairs

### *Education Fairs in Japan, South Korea and Viet Nam:*

October marked the peak period for student fairs in several of our focus markets. There was strong interest in all fair locations with a significant rise in numbers compared to 2023.

- Japan’s New Zealand Education Fair took place in Tokyo on Sunday 6 October. There were 54 New Zealand education providers in attendance to meet with the 516 students and 217 parents who accompanied them. This was up from the 266 students who attended the fair in 2023.
- On Saturday 12 October, ENZ hosted 46 education providers and 616 registered students at its New Zealand Education Fair in Seoul. This was more than double the number of students who attended in 2023 (303).

<sup>2</sup> The October 2024 survey was the second brand health research completed for ENZ by Accenture (Fifty-five 5).

<sup>3</sup> Indonesia was included in the April 2024 research but was not surveyed in October 2024. This change enabled ENZ to instead survey parents in five key school markets.

<sup>4</sup> To calculate the combined finding, the April and October survey samples were combined into one whole-of-year sample

- The final student fairs for October took place in Viet Nam, in Ho Chi Minh City and Hanoi on October 19 and 20. Across the two student fairs, there were 737 students attending this year. This was up from 641 in 2023.
- A total of 1,869 prospective students (or highly qualified leads) attended the four Fairs and were subsequently added into ENZ's lead management database.

## Agent Activities and Fairs

### Agent Fairs

A series of agent events followed the student fairs held in Japan, South Korea, and Viet Nam, to leverage the presence of New Zealand's education providers in-market during October.

- Agent fairs were held in Tokyo and Osaka and had 107 and 58 agents/educators attending the respective locations. 75% and 60% of education agents at the Tokyo and Osaka agent seminars respectively said in a post-event survey that they were much more likely to recommend New Zealand as a study destination following the event. 20% of those in Tokyo and 40% of those in Osaka said they were somewhat more likely to recommend New Zealand.
- The fairs then moved to Seoul which saw 69 agents/educators and 35 New Zealand education providers attending. In the post-event survey, 63% of education agents said they were much more likely, and 38% were somewhat more likely to recommend New Zealand as a study destination.
- Lastly, 68 education agents and 40 education providers attended the agent fair in Ho Chi Minh City and 49 education agents, and 39 providers attended in Ha Noi. 92% of agents attending both events said they were much more likely to recommend New Zealand as a study destination. The remaining 8% said they were somewhat likely.

### Webinar series for Education Agents

ENZ hosted a series of webinars in October to December, attended by 651 education agents. These sessions provided agents with critical information to better support international students and promote New Zealand as a study destination. The webinars also reinforced New Zealand's commitment to high-quality pastoral care and education standards.

The sessions covered key topics relevant to agents, including:

1. **NZQA Overview of the Code of Practice** – Presented by the New Zealand Qualifications Authority (NZQA) in October, this webinar provided an overview of the *Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021*. It outlined provider responsibilities in supporting international learners' wellbeing and safety, as well as requirements for managing and monitoring education agents.  
In December, a second webinar was organised with NZQA to help education agents better understand the NCEA qualification and the recent changes associated with it. This webinar was well received, with 241 attendees, and featured a robust question and answer session at the end.
2. **Spotlight on Te Tai Tokerau Northland and Waikato** – These webinars highlighted the region's education offerings and unique opportunities for international students.
3. **Introduction to Māori Culture** – This webinar offered education agents the opportunity to learn more about Māori culture and the unique experience international students are offered in New Zealand.
4. **International Education Data** – Presented by ENZ's Insights team, this webinar provided an overview of the *New Zealander's Perceptions of International Education Survey* and how to access data on *International Student Enrolments in New Zealand*.
5. **BrandLab Overview** – Presented by ENZ's Brand team, this webinar covered the range of digital resources showcasing the incredible educational opportunities and experiences that international students have in New Zealand. This included testimonial videos, brochures and

student profiles, assets which have been designed to support agents in promoting New Zealand education.

#### *INZ agent webinar*

Immigration New Zealand (INZ), in partnership with ENZ, held a Global Agent Webinar on 14 November which was attended by 1,303 agents. The webinar focused on providing the latest visa processing update, outlining the best practices for student visa applications and other key resources. The INZ team responded to common immigration-related queries asked by agents, and there was also a live question and answer segment at the end of the webinar.

The rationale behind this session was to improve the quality of student visa applications and foster a better understanding of immigration processes among education agents. To further support agent capability, the Q&A from this session was made available on AgentLab, ensuring that those who were unable to attend could still access this critical information. This aligns with ENZ's wider role in providing education agent training, increasing agent capability and equipping them with the tools needed to effectively market New Zealand as a study destination.

#### **Impact of the Webinars**

These webinars play a crucial role in strengthening agent capability and ensuring they have the latest, most accurate information to advise prospective students and their families. By equipping agents with knowledge on key topics such as visa processing, education pathways, and cultural understanding, ENZ is enhancing the student experience and reinforcing New Zealand's reputation as a trusted study destination. The strong engagement and positive feedback from attendees indicate that these initiatives are valuable in supporting international student recruitment and retention.

#### *China Agent Seminars*

ENZ hosted three agent seminars in Beijing, Wuhan, and Guangzhou from 4 to 11 November with a total of 423 attendees connecting with 36 New Zealand education providers. Education agents continue to be the main recruitment channel for the Chinese market for all subsectors and these flagship agent seminars are crucial for engaging with this market.

These seminars are organised twice a year and have been held for over a decade. The seminars included presentations from INZ which proved a highlight. 94% of agents from across the three seminars reported that the inclusion of INZ at the event was very important or extremely important.

#### *Online course in partnership with ICEF Academy:*

The joint ENZ-ICEF Academy online course for education agents (New Zealand Education Agent Course) has continued to garner interest. The course offers comprehensive insights into New Zealand's policies, culture, and education system, enhancing agents' ability to promote the country as a study destination. As of 30 November 2024, 1,259 have enrolled in the ICEF agent course and 355 have completed it. Course graduates are from 15 countries, with Australia leading, followed by New Zealand, Nepal, Japan, and India.

#### **Japan Destination Marketing with Whanganui**

From 4 to 6 November, ENZ supported a delegation from Whanganui & Partners visiting Okinawa Prefecture as part of its regional outreach and promotional programmes in Japan. The purpose of the visit was to raise awareness for studying in New Zealand, and particularly the Whanganui region, among students, parents, and teachers at international schools in Okinawa.

Internationalisation is a high priority for the Japanese government, with the number of international Baccalaureate (IB) schools now over 150. 100 of these IB schools are registered international schools in Japan. The delegation's programme aimed to leverage this drive for international education with several visits organised to international schools, as well as meeting with key education stakeholders across the Prefecture.

Local Okinawa media covered the visit with an item on its news channel reaching a potential audience of 600,000 households in the Prefecture.

## Viet Nam – NZ Universities Awards launched

ENZ announced the launch of the New Zealand Universities Awards (NZUA) in Viet Nam on 11 November. This is a provider-based and government-supported scholarship initiative designed for Vietnamese students pursuing undergraduate studies in New Zealand. The NZUA programme is applicable for the February 2026 intake of students and offers 14 scholarship each worth NZD 15,000 for students enrolling at one of New Zealand's universities. 100% of the scholarship funding comes from the universities directly, totalling NZD 210,000 across the eight universities. ENZ contributes NZD 21,500 which is used to market the scheme and manage the operations.

The launch of this scholarship, alongside the New Zealand Schools Scholarships (NZSS), and the Manaaki New Zealand Scholarships for postgraduate studies, means that New Zealand now provides support for Vietnamese students at all study levels with its government-supported scholarship programmes. The NZUA scholarship will specifically leverage and accelerate interest in New Zealand's university sector amongst prospective students.

## New Zealand to host Brazilian study abroad programmes scholarship recipients in 2025

It was announced during this quarter that New Zealand is one of five countries selected to host high school 'Ganhando o Mundo' scholarship winners from the Brazilian state of Paraná in 2025. An estimated 200 students from the state are expected to spend six months in New Zealand schools over the course of the year.

'Ganhando o Mundo' is an international education programme created by the Paraná State Department of Education which allows thousands of students from public high schools to study abroad for two terms with all expenses subsidised. The goal is to provide academic training in foreign institutions, as well as cultural and pedagogical experiences that can later be shared in schools in Paraná.

A similar study aboard programme has also been announced by the Government of São Paulo. 'Prontos pro Mundo' (Ready for the World) will send approximately 100 Brazilian students to study at New Zealand high schools during term 1, 2025.

## Market Assessment in the Middle East

ENZ undertook an assessment of countries within the Gulf Cooperation Council (GCC) to inform ENZ's future involvement in the region over several weeks in October. Highlights of the assessment included:

- Pre-departure meetings were held across the sector to assess interest and readiness for participation in student mobility initiatives within the GCC countries. These discussions

provided insights into the sector's appetite for engagement and potential opportunities for collaboration in the region

- Engagements were held in Dubai and Abu Dhabi in the United Arab Emirates, Riyadh in the Kingdom of Saudi Arabia, Muscat in Oman, and Kuwait City in Kuwait.
- A New Zealand alumni event was held in Riyadh and highlighted the significance of alumni connectivity in-market. This event underscored the value of sustained alumni engagement and the broader opportunities it presents for New Zealand's presence and relationships in the region.

## #WhyNewZealand – India PR Campaign

ENZ India's PR campaign, #WhyNewZealand, was awarded first place in the Education/EduTech category at the STAKES PR and Communications Excellence Conference & Awards 2024 on 22 November. The campaign was selected the winner from over 350 entries in this year's competition.

These Awards are an annual event that recognises the best work of communications professionals in India across the categories of Marketing, Advertising, Public Relations, Media, and Business Development. This recent win brings the fifth award win in 2024 for the #WhyNewZealand campaign and is the fourth consecutive year that ENZ has won Gold at these awards for its PR campaigns in the Education/EduTech category.

## New Zealanders' perception of international students

ENZ has been monitoring New Zealander's perceptions of international education and international students in New Zealand since 2016. The results of 2024's survey were published in October with the top line survey result finding that 72 percent of respondents believed that international education/international students benefit New Zealand. This is similar to 2023 when 75 percent agreed or strongly agreed with this statement and 73 percent in 2022.

For the first time this year, the annual survey asked respondents if they wanted to see more or fewer international students in the country. 41 percent of those surveyed said they would like to see more, with another 36 percent supporting the same number of students. 82 percent of New Zealanders agreed that international students contribute to our cultural diversity, with 79 percent feeling they help local students learn about other cultures and ways of life, as well as contributing to local businesses during their studies.

## Goal 2 - Partner and connect

Measure	Actual 2023/24	Q2 2024/25	Target 2024/25	Comment
ENZ's key connections and partnerships in targeted markets contribute to a connected New Zealand	Achieved	-	Qualitative	Work underway.
International students have access to relevant information to support their New Zealand education experience.	N/A	-	80%	Measure to be reported Quarter Four through the student experience survey.
ENZ's international education insights are valued by the international education sector and NZ Inc agencies.	New Measure	-	Deliver at least ten key insights publications	The measure is under development and will be reported in the next quarter report.

Measure	Actual 2023/24	Q2 2024/25	Target 2024/25	Comment
			and/or events to Sector. 75% satisfaction	
Maintain or increase Māori and Pasifika participation in the PMSA/LA	25.0% Māori	25.6% Māori 4.4% Pasifika	Maintain	We are on track overall to achieve the measure.
Percentage of payments ENZ makes to tertiary education institutions for the Manaaki NZ scholarships programme that are made within agreed timeframes	98%	97%	97%	On track.

## Country of Honour Announcement: China Annual Conference for International Education

On 31 October 2024, the China Education Association for International Exchange (CEAIE), an agency under the China Ministry of Education (China MoE) announced that New Zealand will be the Country of Honour (CoH) at the 2025 China Annual Conference and Expo for International Education (CACIE). CACIE is the largest international education conference in China connecting professionals, researchers, and international education stakeholders.

The event is usually attended by China's Minister of Education and high-level representatives from around the world. The main events of the 2025 conference are scheduled to take place in Beijing from 29 to 31 October with the Education Expo 31 October – 1 November. New Zealand's participation at CACIE will help enhance student mobility, academic and research collaboration, and people-to-people links. Being the Country of Honour means there are significant opportunities to showcase New Zealand education through a strong in-person presence, New Zealand-focused events, cultural performances and media engagements.

ENZ's Chief Executive, Amanda Malu, provided the 2025 Country of Honour acceptance address at this year's conference in Beijing and attended the China Education Expo meeting with representatives from 12 New Zealand providers exhibiting at the New Zealand national pavilion. Amanda also participated in media interviews with top education media outlets following the announcement and highlighted the popularity of New Zealand as a study destination for Chinese students.

## World Vocational and Technical Education Development Conference

ENZ's China team attended the World Vocational and Technical Development Conference held in November in China to support the New Zealand Ambassador and senior representatives from New Zealand education providers. Representatives included Chief Executives from Te Pūkenga/NZIST subsidiaries and Te Whare Wānanga o Awanuiārangi. The Ambassador was invited to provide remarks at the conference, a positive sign of the bilateral education relationship as the conference is hosted by the China Ministry of Education. The presence of a New Zealand official at the event put New Zealand's vocational education providers in the spotlight and amplified New Zealand's education offerings to a Chinese and global audience.

## 5th New Zealand-China Early Childhood Education Symposium

Eighty New Zealand and Chinese officials, academics and Early Childhood Education practitioners came together at the University of Canterbury in Christchurch for the 2024 New Zealand-China early Childhood Symposium on 3 December. This was the first time the event has been held in New Zealand.

The Symposium is an important strand of Government-to-Government education cooperation and demonstrates the value of the event for the education sector in both New Zealand and China. A 31-strong delegation from China across 21 universities, schools, kindergartens and government agencies attended to learn and share knowledge with their New Zealand peers.

ENZ worked closely with the China Center for International People to People Exchange, an agency under China's Ministry of Education to co-sponsor the Symposium which is referred to in the NZ-China Arrangement on Education and Training. Participation from both the Chinese Embassy in Wellington and the Chinese Consulate-General in Christchurch was a nod to the positive bilateral education relationship between New Zealand and China.

## Scholarship Programmes

### *Prime Minister's Scholarships for Asia and Latin America*

119 individuals were awarded scholarships in the latest individual round of the Prime Minister's Scholarships for Asia and Latin America (PMSA/PMSLA). This was announced in a media release issued by Minister Simmonds on 25 November and ENZ supported the office with the drafting of the release and the individual letters of congratulations.

The selection panels for the 2024 individual round of PMSLA took place at the end of September with 325 applications received (218 for Asia and 107 for Latin America). The 22 panellists involved included representatives from ENZ, NZTE, MFAT, Te Pūni Kōkiri, Centres of Asia and Pacific Excellence, the Asia New Zealand Foundation, and previous PMSA/LA alumni.

A total fund of NZD 1,810,904.51 was distributed through this individual round (NZD1,328,210.29 towards PMSA recipients and NZD482,694.22 to PMSLA recipients).

### *Manaaki New Zealand Scholarships Programme*

ENZ administered the third round of the Manaaki New Zealand Scholarships Programme's Pacific Diplomatic Training course that took place in Wellington in November. The course involved early career diplomats (with a cohort up to 30 scholars) from across the Pacific taking part in two rounds of training in Wellington and then an alternating Pacific country in early 2025.

## International Student Expenditure Survey and Economic Contribution Estimate

The fieldwork for the International Student Expenditure Survey has been completed. Compared to the 2018 survey (the last time this survey was conducted), a similar proportion of respondents (compared to the total international student population) was achieved thanks to support from INZ, peak bodies, and individual providers in sharing the survey.

The data from this survey will be a key input into the immediate economic contribution of international education estimate and Statistics New Zealand's Balance of Payments statistics. Conversations are progressing with the Ministry of Education and the Ministry of Business, Innovation and Employment to agree on the scope and accurate way of assessing the current value and tracking its growth.

## Goal 3 - Support sector capability development

Measure	Actual 2023/24	Q2 2024/25	Target 2024/25	Comment
ENZ's support is valued by the international education sector	77%	-	75%	Measure will be reported in Quarter Four via the Sector Survey. Planning for the survey will take place in Q3.

Provide international education insights that are valued by the sector	New Measure	Under Development	Deliver at least ten key insights publications and/or events to Sector. 75% satisfaction	This measure is under development and will be reported in the next quarter report.
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## Peak Body Forum

The final Peak Body Forum for 2024 was held at ENZ's Wellington office on 27 November 2024 with all peak bodies and key government agencies in attendance. The purpose of the Forum is to discuss sector-wide issues to support the growth of international education and connect education sector representatives and government agencies.

Minister Simmonds opened the Forum with an address and government agencies gave the following key updates:

- INZ noted that the 'apply early' message has been actively communicated through various channels with assistance from ENZ.
- MBIE provided an update on the policy work programme including in-study, partner and, post study work rights.
- MoE noted that an ongoing focus remains for the International Education Senior Officials group to strengthen the cohesion between government agencies to determine collective priorities and work collaboratively. The Ministry also noted that there was an interest in looking further into any job displacement issues related to post study work rights.
- NZQA noted that public consultation on the New Zealand Qualifications and Credentials Framework changes was completed in November with 43 submissions. Level descriptors is an area identified for further work along with credit recognition and transfer. A review of the integrated Quality Assurance Framework (iQAF) was also underway. This includes some major proposals such as no longer undertaking External Evaluation and Reviews which are acknowledged to have significant ramifications for the international education sector and need to be worked through.

## ENZ and SIEBA launch Primary Schools' Growth Programme

During October, ENZ launched the 'Primary schools' growth programme – E Tipu E rea' in collaboration with SIEBA. The programme was in response to feedback in ENZ's sector survey and SIEBA's member survey. It is designed to address a capability gap with many new schools starting to engage in international education with low commercial capability, and takes account of the subsector's unique challenges of recruiting/hosting a parent with a child which is a requirement for primary school age students studying in New Zealand.

The first session attracted 97 registrations, highlighting the strong interest in this programme. Two further sessions were held in this quarter.

## Building capability in the schools' sector

This quarter, ENZ continued to hold its monthly webinar series for primary and secondary schools who are currently active in international education to help build knowledge and capability. Each webinar focuses on a different topic with data and insights shared.

- October's topic focused on New Zealand's competitors in the school market and covered who our main competitors are, how they market themselves, their regulatory settings, and how New Zealand schools can set themselves apart.
- November's webinar had a focus on Thailand and participants were invited to meet our in-market experts and hear about ENZ's school sector Thailand initiatives for 2025.
- December's webinar included a workshop, with Michael Watson from Study Spy, taking attendees through how they can do a listing on the Study with New Zealand website to assist their student recruitment.

## PTE webinar series launched with Indian education agents

With India representing the largest source market for New Zealand PTEs, a virtual series was launched in October for education agents from India titled *Unlock Your Future with New Zealand PTEs*. The purpose of the series is to create a channel for PTEs to directly establish and strengthen relationships with agents in this market and provide them with information about programmes and courses.

A total of 62 education agents attended the first webinar which focused on Engineering, Technology, and IT programmes. A second webinar was held in November with nine PTEs and this session explored education options in food, hospitality, personal services, health, agriculture, and environmental studies.

## Goal 4 - Optimise Education New Zealand

Measure	Actual 2023/24	Q2 2024/25	Target 2024/25	Comment
Percentage of ENZ staff who have undertaken te reo Māori and cultural training	93%	100% completion of courses 1-7 of Te Rito	85%	Te Rito courses 1-7 have reached 100% completion by staff.
Percentage of ENZ staff who agree or strongly agree that ENZ's actions contribute to the safety and wellbeing of its employees	85%	-	85%	Reported via the pulse survey, scheduled for May 2025

## Ministerial Servicing

ENZ continued to provide timely and relevant briefings, reports, and responses to parliamentary questions for the Minister. December's high number of deliverables was due to 119 individualised letters of congratulations to Prime Minister's Scholarships for Asia and Latin America recipients.

Deliverables	Oct-24	Nov-24	Dec-24
<b>Briefings</b>	1	6	3
<b>Correspondence</b>			1
<b>Speech</b>			
<b>Ministerial Correspondence</b>	1		119
<b>Monthly Report</b>	1	1	1
<b>OIA - ENZ</b>	3	1	3
<b>OIA - Minister</b>			
<b>OIA – media request</b>			

Deliverables	Oct-24	Nov-24	Dec-24
WPQ	15	35	19
<b>Total</b>	<b>21</b>	<b>43</b>	<b>146</b>

## 5. Risk Management

This quarter, the Board approved an updated risk management policy and procedure to better align with ENZ's evolving business needs and strengthen its ability to manage risks and opportunities effectively. A key enhancement was the introduction of the Board's risk appetite rating framework, which uses a four-scale rating system to define the level of risk the Board is prepared for the organisation to accept in achieving its strategic objectives.

In December, the Audit and Risk Committee and the Board held biannual risk discussion, to review the current risk landscape and identify any emerging strategic risks, opportunities, and trends. The discussions also focused on reviewing the Board's risk appetite ratings to ensure alignment with strategic objectives. Additionally, the Board considered potential improvements to support informed decision-making and enhance its oversight of ENZ's risk management practices to be implemented in 2025. These risk discussions are an integral part of ENZ maintaining proactive and adaptive risk management practices by offering valuable insights and guidance from the Committee and Board.

## 6. Looking Forward

In the coming months, several key initiatives were planned to continue growing international student numbers, building partnerships, and supporting sector capability:

### CACIE and New Zealand as the Country of Honour

Planning for CoH activities is underway with a project team established and regular meetings scheduled. Engagement with the sector gathered momentum in March with a webinar to the sector and sectoral delegation survey.

### South America Roadshow

ENZ's South America Roadshow took place from 13 to 21 March, visiting Bogotá, São Paulo and Santiago. The events offered the New Zealand providers the opportunity to deliver presentations to local education agents, meet with them one-on-one, and network at a closing function. Providers included representatives from across our subsectors including English Language Schools, secondary schools, Te Pūkenga/NZIST subsidiaries, universities, and PTEs.

### New Zealand – India Connect and APAIE 2025

ENZ organised a high-level sector delegation to attend New Zealand-India Connect. This took place ahead of the APAIE 2025 Conference to be held in New Delhi from 24 to 28 March and timed to coincide with the Prime Minister's Trade Mission to India. Representatives at New Zealand-India Connect included senior members from all eight New Zealand universities. Representatives from Southern Institute of Technology, WhiteCliff College, and Ignite Colleges.

### ENZ-led in-market events



ENZ hosted a Global Agent Webinar, in partnership with INZ, on 5 March and a series of in-person agent seminars in Guangzhou, Beijing, and Shanghai from 20 to 26 March.

## 7. ENZ Financial Performance to 31 December 2024

STATEMENT OF FINANCIAL PERFORMANCE		For the 6 months to 31 December 2024		
		Actual	YTD Budget	Last Year
<b>\$000s</b>				
<b>Operating Revenue</b>				
Revenue from the Crown - Operating		13,466	14,020	14,967
Other revenue		167	164	81
<b>Total operating revenue</b>		<b>13,633</b>	<b>14,184</b>	<b>15,048</b>
<b>Scholarship Revenue</b>				
Revenue from the Crown - scholarships		1,875	1,875	1,875
<b>Total scholarship revenue</b>		<b>1,875</b>	<b>1,875</b>	<b>1,875</b>
<b>Operating Expenditure</b>				
Personnel costs		7,142	7,208	7,283
Contractors & Consultants		80	75	460
Other expenditure		6,268	7,008	7,246
<b>Total operating expenditure</b>		<b>13,490</b>	<b>14,291</b>	<b>14,989</b>
<b>Scholarship expenditure</b>				
Scholarship expenses		761	1,542	643
<b>Total scholarship expenditure</b>		<b>761</b>	<b>1,542</b>	<b>643</b>
<b>Net surplus / (deficit)</b>		<b>1,257</b>	<b>226</b>	<b>1,291</b>
STATEMENT OF FINANCIAL POSITION		As at 31 December 2024		
		Actual	Full Year Budget	Last Year
<b>\$000s</b>				
<b>Assets</b>				
Total current assets		6,710	6,181	6,993
Total non-current assets		701	339	433
<b>Total assets</b>		<b>7,414</b>	<b>6,520</b>	<b>7,426</b>
<b>Liabilities</b>				
Total current liabilities		2,839	3,600	3,188
Total non-current liabilities		591	202	231
<b>Total liabilities</b>		<b>3,430</b>	<b>3,802</b>	<b>3,419</b>
<b>Net assets</b>		<b>3,984</b>	<b>2,718</b>	<b>4,007</b>
Surplus made up of:		Year-to-date	Year-to-date Budget	Year-to-date Variance
International Education Programmes		143	(107)	(250)
Prime Minister's Scholarships		1,114	333	(781)
<b>Surplus/(Deficit)</b>		<b>1,257</b>	<b>226</b>	<b>(1,031)</b>

STATEMENT OF CASH FLOW		As at 31 December 2024	
\$000s		Actual	Full Budget
<b>Cash flows from operating activities</b>			
Receipts from the Crown		14,351	28,673
Receipts from Other revenue		1,173	1,500
Payments to suppliers, employees and IRD		(15,246)	(29,734)
<b>Net cash flow from operating activities</b>		<b>278</b>	<b>439</b>
<b>Cash flows from investing activities</b>			
Payments for new term deposits		(1,500)	0
Interest received		264	440
Purchase of property, plant and equipment		(47)	(257)
Receipt from maturity of term deposits		1,500	0
<b>Net cash flow from investing activities</b>		<b>217</b>	<b>183</b>
<b>Net cash flow from financing activities</b>			
Net increase/(decrease) in cash		493	622
Cash at the beginning of the year		2,917	329
<b>Cash at the end of the period</b>		<b>3,410</b>	<b>951</b>

## Summary

We are halfway through the year. International Education Programmes expenditure is largely on track to year-to-date budget. The Prime Minister's Scholarships payments are being made to scholars as they take up their scholarships.

## 8. Manaaki NZ Scholarship Programme

The Manaaki New Zealand Scholarship Programme (MNZSP) is funded by the Ministry of Foreign Affairs and Trade (MFAT) and is delivered by ENZ. Funding is paid in advance each month to maintain sufficient working capital.

STATEMENT OF FINANCIAL PERFORMANCE			For the 3 months to 31 December 2024		
			Actual	YTD Budget	Last Year
<b>\$000s</b>					
<b>Scholarship Revenue</b>					
Revenue from MFAT			33,403	34,439	30,133
<b>Total scholarship revenue</b>			<b>33,403</b>	<b>34,439</b>	<b>30,133</b>
<b>Operating Revenue</b>					
Revenue from MFAT - Operating			1,682	2,425	1,801
<b>Total operating revenue</b>			<b>1,682</b>	<b>2,425</b>	<b>1,801</b>
<b>Scholarship expenditure</b>					
Scholarship expenses			25,849	34,439	20,322
<b>Total scholarship expenditure</b>			<b>25,849</b>	<b>34,439</b>	<b>20,322</b>
<b>Operating Expenditure</b>					
Personnel costs			1,082	1,429	1,253
Other expenses			697	996	691
<b>Total operating expenditure</b>			<b>1,777</b>	<b>2,425</b>	<b>1,944</b>
<b>Net surplus/(deficit)</b>			<b>7,459</b>	<b>0</b>	<b>9,668</b>

STATEMENT OF FINANCIAL POSITION			As at 31 December 2024		
			Actual	Full Year Budget	Last Year
<b>\$000s</b>					
<b>Assets</b>					
Total current assets			12,664	14,570	12,904
Total non-current assets			-	-	-
<b>Total assets</b>			<b>12,664</b>	<b>14,570</b>	<b>12,904</b>
<b>Liabilities</b>					
Total current liabilities			5,205	14,570	3,235
Total non-current liabilities			-	-	-
<b>Total liabilities</b>			<b>5,205</b>	<b>14,570</b>	<b>3,235</b>
<b>Net assets</b>			<b>7,459</b>	<b>-</b>	<b>9,669</b>

### Summary

The MNZSP expenditure is tracking \$9.238m under the year-to-date (YTD) budget. The variance is attributed Manaaki Scholarships Expenditure: \$4.450m under the YTD budget and Manaaki Operations and Future State Project: \$1.060m under the YTD budget.