



**NEW ZEALAND
EDUCATION**
Manapou ki te Ao

Quarter Four Report

Education New Zealand

Manapou ki te Ao

1 April to 30 June 2025

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1. Executive Summary

In this last quarter of the 2024/2025 financial year, Education New Zealand Manapou ki te Ao (ENZ) performed extremely well against its strategic goals, achieving almost all its targets for the year. Several targets were also significantly exceeded. Highlights for the quarter included:

- Finalising and delivering the International Go to Market plans and actively contributing to the development of the International Education Going for Growth Plan (Growth Plan) to Cabinet;
- Supporting the Prime Minister's Mission to China during which New Zealand's Country of Honour campaign for the China Annual Conference and Expo for International Education (CACIE) was launched. Ten new partnership signings were also either established or reaffirmed during the visit with the combined education partnership revenue exceeding NZ\$43.8 million;
- The broad range of in-market campaign and in-person activities delivered results that surpassed ENZ's awareness, new website sign-ups, and lead generation targets. As well as student and agent facing roadshows, fairs, and webinars, activity included the launch of the Green List and Emerging Market agile campaigns alongside ENZ's Learn New Every Day global brand campaign; and
- The conclusion of scholarship campaigns for various subsectors and markets that received significant PR coverage.

Looking forward to quarter one of the new financial year and delivering against the goals of the Growth Plan, ENZ is focused on the following:

- Finalising its 2025/26 Business Plan including focused investment in India and China in line with the Growth Plan;
- Developing a new creative platform to start delivering on the Growth Plan's goals to enhance New Zealand's global awareness and preference. The new creative expression is "New Zealand taught me..." and will be communicated through the eyes of New Zealand's alumni. The campaign will go live in August.
- Further preparations to leverage New Zealand's Country of Honour status at CACIE;
- Actioning quarter one initiatives that support the growth in international student numbers including co-funded activity with agents, student fairs etc; and
- Sharing the results of the 2025 International Student Experience Survey.

2. Performance Measure Highlights



Other performance highlights which provide a strong foundation to ENZ supporting the delivery of the Growth Plan include:

- Increasing the economic contribution from international education which reached \$3.75b as at March 2025 (from Stats NZ)
- Improving the value ENZ provides to the international education sector as seen in the 2025 Sector Survey. 95% reported that they value the insights and research shared by ENZ. The survey also revealed an increase in the perceived value of ENZ's support from the 2023/24 survey, exceeding the 2024/25 target.
- Achieving the target for online and offline leads to providers.



ENZ's Green List Marketing campaign delivered exceptional results, helping to lift several performance measures against Goal 1. Highlights of the campaign included:



Measures not achieved

There was one target that was partially achieved for the 2024/2025 financial year and two that narrowly missed being met:

1. **Diversify New Zealand Source Markets.** ENZ partially achieved this measure. It achieved its target of reducing China as a source market to below 35% (33.5% achieved), while increasing India's share to above 11% (14.2% achieved). Due to the significant increase in India's share, 'Other' markets did not achieve their target of 54% (52.3% achieved).
2. **Increase in international student enrolments.** International student enrolments for the full year in 2024 reached 83,423, just falling short of the projected target of 85,000 enrolments. Encouragingly however, June 2025 student visa holders have reached 92% of June 2019 levels (61,506).
3. **Percentage of ENZ staff who agree or strongly agree that ENZ's actions contribute to the safety and wellbeing of its employees.** In the most recent Pulse survey, 80% of staff vs a target 85% agreed with this statement. A theme of high workloads has emerged and has likely impacted these overall wellbeing scores. This is alongside mixed comments regarding the change in flexible working policy. Focussed sessions with staff to understand perceptions and identify actions to improve are underway.

3. Global Outlook

New Zealand's competitors continued to explore changes to their international education and adjacent policy and operational settings:

- The United States of America temporarily paused interviews for student visa applicants to implement an expanded social media vetting policy.
- The United Kingdom released an immigration white paper setting out plans to create an immigration system that promotes growth while being controlled and managed. One of the proposals is to introduce a 6% levy on international students' tuition fees to be reinvested into the higher education and skills system. A forecast reduction of 31,000 international students is linked to the white paper's proposed policy changes.
- Australia increased its student visa fee to A\$2,000 from 1 July 2025, the highest student visa fee in the world according to *PieNews*. The fee increase is intended to strengthen the integrity of the student visa programme by ensuring visas are granted to genuine students who support Australia's sustainable economic growth. Some stakeholders have partially linked the slow recovery of Australia's English language sector to Australia's high student visa fee compared to other English language destinations.
- Canada updated its list of post-graduate work permit eligible programmes for non-degree programmes. The changes are intended to align Canada's post-secondary education system with its labour market shortages.

4. Operational Highlights

Visa Applications

International student visa approvals, particularly first-time approvals, provide an important first lead indicator of the number of international students who are likely to enrol in any given year. While not all international students require a student visa, most students in the tertiary subsectors do. While enrolments will always be higher due to the inclusion of returning students, first-time visa holders provide a useful point in time indicator of the growth in the number of new international students in New Zealand.

Student Visa approvals:

In June 2025, 4,614 student **visa approvals** were granted (3,822 of these were first time visas).

- Year-to-date approval rate: 88% (83% for first time visas).
- Visa decline rate (all visas) reached 11% in June.
- Highest decline rates (all visas) in June: Te Pūkenga/NZIST (21%), PTEs (20%), with universities lower at 7% and schools the lowest at 1%.
- **S 6 (a)**

S5 Valid Student Visa Holders:

- There were 56,700 student visa holders as of 30 June 2025, up 12% from May, like the pattern seen in 2024.
- June 2025 student visa holders were at 92% of June 2019 levels (61,506).
- As of 30 June 2025, 48% of student visa holders were enrolled at universities (27,386), the largest proportion with the University of Auckland (9,379).
- In June 2025, China and India continued to remain significant markets for our sector, with 48% of all visa holders from China and India.

Goal 1 - Grow international student numbers

Measure	Actual 2023/24	YTD 2024/25	Target 2024/25	Comment
Maintain or increase brand awareness (prompted)	36%	44%	>=36%	Achieved
Increased number of students proactively gathering information about New Zealand as an international education destination*	355,521	552,145	400,000	Achieved
Maintain brand preference in targeted markets	4%	11%	4-5%	Achieved
Maintain or increase number of leads to providers	-	76,748 (across online, offline**/offshore)	75,000	Achieved
The economic contribution from international education is increased	-	\$3.75b (interim March 25 result)	\$3.5b projected	Achieved – Final Result for Q4 ending June 25 will be available September 25.
Increase in international student enrolments	69,133	83,423	85,000	Not achieved
	China	35%	33.5%	Partially Achieved. The 2024/25 government direction was to diversify our international
	India	11%	14.2%	

Measure	Actual 2023/24	YTD 2024/25	Target 2024/25	Comment
Diversify New Zealand Source Markets***	Others 54%	52.3%	>=54%	student country source and reduce our reliance on the high proportion of students from China. Targeting a reduction to a 35% student source target from China was exceeded. Equally we wanted to specifically focus on India and lift this source market to 11% which was also exceeded- lifting this proportion of our student population to 14.2%. In doing so we fell short of our wider source market goal of 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).

**Offline includes registration for flagship events that are fully funded by ENZ.

***The diversification goal was set in the 2024 Statement of Performance Expectations (SPE) using August 2023 enrolment data, as full-year data was not available when the SPE was being produced. The target was set based on a modest shift on the August 2023 figures, with the expectation of greater shifts in out-years.

Marketing Campaigns

In quarter four, three significant campaigns were live across ENZ's markets. These campaigns are:

- **Learn New Every Day** – ENZ's current global brand campaign. Live throughout the quarter
- **Emerging Markets** – an extension of 'Learn New Every Day' running across paid digital media in Viet Nam, Sri Lanka, the Philippines, Thailand, and the United States of America, with the goal of driving sign-ups and nurturing them into enquiries and referrals. This has been live from 15 May to 30 June 2025.
- **Green List** - An agile delivery campaign targeted at students interested in study pathways that support potential long-term residency through New Zealand's skills shortage. This is optimised toward signups to the SWNZ database and enquiries to providers and has also been live from 15 May to 30 June 2025.

The figures achieved this quarter have led to ENZ achieving well above its awareness targets for the 2024/2025 financial year. These results demonstrate the effectiveness of ENZ's in-marketing campaign activity and the momentum that the campaigns continue to experience in key markets.

The key metric these campaigns were designed to impact was sign-ups to the SwNZ website. The key to a 'sign-up' is that it allows potential students to be nurtured through email to enquiry to a New Zealand education provider. The target for the quarter was 16,000 sign-ups which was well surpassed by a total of 41,182 sign-ups due to the focused activity and investment. Of this figure, 21,263 new sign-ups were attributed to the Learn New Every Day and Emerging Markets campaigns while 11,825 new sign-ups came from the Green List campaign.

The campaigns which ran across the quarter also impacted the other tracked metrics. From 1 April to 30 June 2025:

- 3,745,088 sessions were recorded on the SwNZ site. This brings the total for the year to 8,152,590.
- Advertising Impressions reached 554,429,439. This contributed to a total of 1,389,317,651 advertising impressions¹ achieved across the full financial year.



- Course Researchers² to ENZ's website was recorded at 205,853 in quarter four. This brings the year-end total to 552,145 exceeding the full year target of 400,000.
- The number of enquiries to providers saw a healthy lift this quarter with 6,747 passed on to providers via the SwNZ website. These enquiries added to the annual total of 28,516 on a target of 27,000.

New identity for New Zealand's international education brand

In line with the International Education Going for Growth Plan, ENZ is evolving and strengthening its core brand identity to aid growth in awareness of a New Zealand education across key markets. Research in these markets and engagement with the sector has informed these changes which have started to roll out this quarter.

Education Agent Events

Agent co-funded activities which have translated to higher awareness and lead generation

Market	Timing	Highlights/Updates
Indonesia	May	<ul style="list-style-type: none">• The Extravaganza New Zealand Study Fairs across Jakarta and Surabaya, delivered in collaboration with SUN Education in May 2025 achieved 526 student leads. In the post event survey, 88% of sector representatives said that they were either extremely or somewhat satisfied with the event.
Malaysia	April	<ul style="list-style-type: none">• A schools' roadshow was held in Kota Kinabalu (in collaboration with JM Education in East Malaysia). This achieved 386 student leads.
The Philippines	June	<ul style="list-style-type: none">• A student fair was organised with Secure Visa Consulting Inc and achieved 400 student leads and 127 approved student visas. Fenix Visa Consulting held a student seminar on 21 June in Makati City with 22 student leads where one student already applied to study in NZ.
Thailand	April (end date)	<ul style="list-style-type: none">• A digital marketing campaign that ran over several months with an education agent consortium (including 12 education agencies) finished this quarter. The consortium was able to confirm that the campaign saw a very high conversion rate with the 151 student leads translating to 130 student enrolments.
Viet Nam	April to June	<ul style="list-style-type: none">• A series of co-funded activities with three education agencies wrapped up this quarter. Two digital marketing campaigns, two student-facing events and three online events were held with education agencies, AU Hannah (December 2024 to May 2025) and Catholic MTA (January to April 2025). 338 student leads were achieved from these activities.• Two student-facing events and digital marketing activities were held with education agency, Eduvina, throughout March and April. These translated to 279 student leads.
Colombia	June	<ul style="list-style-type: none">• A co-funded event was organised for 20 education agents alongside the Ministry of Foreign Affairs and Trade (MFAT), Language Studies International, and Whitecliffe College in Bucaramanga. In Bogota, ENZ held training sessions with 20 education agents and participated in a hybrid student event organised by a local agency.

Agent webinar with Immigration Advisers Authority

ENZ supported a webinar hosted by Immigration Advisers Authority on 29 May 2025. The webinar was designed to help education agents stay compliant with New Zealand Immigration rules. Two sessions were held to account for the time differences and 919 education agents from 47 different countries were in attendance across the two sessions. Agents based in New Zealand (363), India (180), Colombia (132), Viet Nam (131), and Brazil (42) made up the top five countries.

Other agent events

Market	Timing	Highlights/Updates
China	April to June	<ul style="list-style-type: none"> ENZ helped four providers prepare for the China Institute of College Admission Counselling Conference which reached more than 50 school counsellors. A series of Education International Cooperation New Zealand only fairs in Jinan, Shijiazhuang, and Guangzhou were undertaken, supporting up to 12 NZ providers. ENZ also supported a University of Canterbury partnership in Wenzhou promoting NZ education to more than 1000 students currently involved in the Joint Programme.
India	April	<ul style="list-style-type: none"> In partnership with INZ, ENZ organised an agent offsite session with 22 agencies from India and Sri Lanka. A social media campaign is running to enhance visibility for the campaign and has received 1 million plus impressions and 25,000 engagements.

Student Activities

Goal 1 initiatives and events previously reported

The following table includes those ENZ-led events that have been previously reported to the Minister in ENZ's monthly updates. Highlights or additional updates are provided where relevant.

Initiative	Timing	Highlights/Updates
Agent and student events		
ITP/PTE Roadshow in the Philippines	26 May to 7 June	<ul style="list-style-type: none"> 11 New Zealand providers represented. 500 students and 47 education agents attended across the three locations. 23 schools attended the two school guidance counsellor workshops. 100% of agents who completed the surveys were 100% more likely to recommend New Zealand as a country to study after attending the events.
PTE sector webinars for education agents in India	June	<ul style="list-style-type: none"> ENZ hosted the 3rd 'Unlock your future with NZ PTEs' webinar for India. Five New Zealand PTEs were represented in Management and Commerce fields. 64 education agents attended.
Kiwi EdLink Consortium hosts agent event in Thailand	June	<ul style="list-style-type: none"> ENZ partnered with four Auckland secondary schools, representing the Kiwi EdLink Consortium. 15 education agents and a representative from the New Zealand-Thai Chamber of Commerce attended.
Auckland Schools' visit to Japan	May	<ul style="list-style-type: none"> 15 Auckland-based secondary schools visited Japan. The group met with over 50 education agents and local schools at an ENZ-arranged event at the New Zealand Embassy in Tokyo.
KIWI Challenge Final	April	<ul style="list-style-type: none"> The final of the KIWI Challenge in the Philippines took place on 12 April. There were 15,800 web views of the final and 9,000 SwNZ sign-ups recorded.

Exploratory visit to Sri Lanka	June	<ul style="list-style-type: none"> ENZ conducted a two-day visit to Colombo in early June, meeting with a range of stakeholders to better understand growth opportunities in this emerging market.
Promotional scholarships		
NZEA	April/June	<ul style="list-style-type: none"> Applications for the New Zealand Excellence Awards (NZE) scholarship programme in India closed in April and scholarships confirmed in June. 30 scholarships were awarded across eight universities.
Viet Nam – NZSS Scholarship Award Ceremony	June	<ul style="list-style-type: none"> 2025 New Zealand Schools Scholarships (NZSS) concluded in June. 20 students were awarded scholarships. The campaign achieved 40 media clippings valued at NZD120,000 in PR coverage.
Welcome to NZ Scholarship	June	<ul style="list-style-type: none"> Scholarships have been awarded to the three winners from Germany and Italy. The Italian winner, a 16-year-old student from Milan, was awarded their scholarship at an event timed to leverage a market visit to Italy to engage directly with education agents.

ENZ's Goal 2 - Partner and connect

Measure	Actual 2023/24	YTD 2024/25	Target 2024/25	Comment
ENZ's key connections and partnerships in targeted markets contribute to a connected New Zealand	Achieved	96% of partnerships achieved target results	Qualitative assessment	Achieved
International students have access to relevant information to support their New Zealand education experience. **	87%	87%	80%	Achieved
ENZ's international education insights that are valued by the international education sector and NZ Inc agencies.	New measure	1. 391 publications and/or events 2. 95% ¹ satisfaction achieved in ENZ's sector survey (does not include NZ Inc agencies)	1. Deliver at least 10 key insights publications and/or events to NZ Inc. 2. 75% satisfaction	Satisfaction Achieved. The high number of insights publications is attributable to the provision of the International Education Go to Market Plans to NZ Inc agencies. We do not anticipate these to be developed again for FY25/26 and accordingly the target for FY25/26 reflects this.
Maintain or increase Māori and Pasifika participation in the PMSA/LA	25%	30.5%	Maintain	Achieved
International students in New Zealand have a positive experience**	New measure	87%	Projection 80%	Achieved
Percentage of payments ENZ makes to tertiary education institutions for the Manaaki NZ scholarships programme that are made within agreed timeframes	98%	98%	97%	Achieved

^{*}Note: There was an equivalent measure in 2023/24, though wording has now been changed from "timely, relevant and useful information" to simply "relevant". The target was set before a result was available for 2023/24.

^{**} As recorded in the 2024 New Zealand International Student Experience Survey

¹ The same insight delivered to multiple audiences has been counted only once, as it represents a single insight delivered.

² This result was reported from the 2025 Sector Survey.



Supporting the Prime Minister's Trade Delegation to China

The Prime Minister's Trade Mission to China from 17 to 20 June 2025 saw significant education outcomes delivered and support for the tertiary education sector's engagement with China, New Zealand's largest source market of international students. The visit also reinforced at the Government and sector level our strong bilateral education relationship.

The Mission's education highlights included:

- The three education providers, alongside ENZ's Chief Executive, establishing or reaffirming ten new partnership signings with combined education partnership revenue exceeding NZ\$43.8 million. Some of the partnerships directly relate to increasing the number of Chinese students studying in New Zealand, and others are programmes with components of offshore delivery in China. Refer to table below outlining these new partnerships.
- An education event at Fudan University in Shanghai, one of China's most prestigious universities. During this event, the Prime Minister announced the 2025 New Zealand – China Tripartite Fund recipients and commemorated 20 years of the New Zealand-China Tripartite Partnership Programme.
- In Beijing, ENZ hosted New Zealand Education Connect and showcased New Zealand as a study destination to key partners. Alongside the Prime Minister, ENZ officially launched New Zealand's Country of Honour campaign for the China Annual Conference and Expo for International Education (CACIE) which will be taking place later this year.
- Media activity and promotional campaigns launched to coincide with the Prime Minister's visit led to significant third-party media outreach and online activity including:
 - 7,472 education-related coverage pieces, accounting for 95% of all media mentions related to the Prime Minister's visit to China (as at June 26 2025)³.
 - 4,430 new followers to ENZ's WeChat Official Account and WeChat Channel Account within two weeks of the visit. This represents 63.29% of the total follower target, with the campaign set to run until 31 July.
 - Social media activity surrounding the two events in Shanghai and Fudan achieved a total of 8.7K organic reads, an 85% increase from the yearly average, and generated 1.2K likes, comments, and shares, a 137% increase from the yearly average.

Details of the ten MOUs signed during the Mission:

Education Providers/Agency	Key deliverable and value ⁴
Te Pūkenga/New Zealand Institute of Skills and Technology	<p>Aim: Support future growth in vocational partnerships to increase the value of international education for the sector.</p> <ul style="list-style-type: none">• MOU between Unitec and Shanghai University of Engineering Science. This aims to raise the profile and influence of New Zealand education in China through education and research exchange.^{5 9 (2)(b)(ii)}• MOU between Nelson Marlborough Institute of Technology and Zhejiang University of Water Resources and Electric Power. Three degrees will be taught in China over four years with 100 students in each cohort (est. NZ \$4 million annual revenue).
Te Herenga Waka -Victoria University of Wellington	<p>Aim: Develop joint research and student mobility.</p> <ul style="list-style-type: none">• MOU between Victoria University of Wellington & Communication University of Zhejiang - Dual degrees offered in Master of Intercultural Communication and Applied Translation and Master of Computer Science. ^{5 9 (2)(b)(ii)}• Study Abroad arrangement between Victoria University of Wellington & Zhengzhou University – to enable students, beyond those in the existing Joint Education Institute, to

³ Data sourced from third-party media monitoring as of 26 June 2025. "Education-related coverage" refers to mentions of education, which may include articles that also covered other aspects of the Prime Minister's visit.

⁴ Please note: Revenue projection sensitivities and use of commercial in confidence information. New Zealand education providers do not wish to have any commercial figures publicly attributed to the partnerships. The figures supplied are to help report broader economic value for New Zealand.



	<p>study at VUW for one or two trimesters, enhancing academic exchange S 9 (2)(b)(ii)</p> <ul style="list-style-type: none">MOU between Victoria University of Wellington & Yantai University – new partnership in Bachelor of Arts S 9 (2)(b)(ii)(Presented during Fudan University event) MOU between Victoria University of Wellington & Fudan University – revitalise the relationship, achieve resumption of student flows, and pursue research cooperation in the areas of public health, bio-tech and climate science. S 9 (2)(b)(ii)
Up Education	<p>Aim: Showcase the strength of New Zealand's education partnerships and reinforce momentum at provider level with three MOU signings.</p> <ul style="list-style-type: none">MOU: Up Education (University of Auckland International College, UoAIC) & Beijing National Day School (BNDS) S 9 (2)(b)(ii)MOU: Up Education (University of Auckland International College) & Hangzhou No. 2 School Group. S 9 (2)(b)(ii)MOU: Up Education (New Zealand Tertiary College) & Etonkids Educational Group – Teacher Training S 9 (2)(b)(ii)
Education New Zealand Manapou ki te Ao	<p>Aim: Expand bilateral cooperation with strategic Chinese government partners to highlight New Zealand's quality education providers.</p> <ul style="list-style-type: none">Arrangement signed between ENZ & China Education Association for International Exchange to formalise the framework for New Zealand's Country of Honour engagement.

Goal 2: Activities previously reported to the Minister

The following table lists the activities and initiatives that have been previously reported to the Minister in ENZ's monthly updates relevant to this quarter.

Initiative	Timing	Highlights/Updates
Incheon MOE visit	5-13 May	<ul style="list-style-type: none">A delegation of senior school leaders from the Incheon Metropolitan Office of Education East Asia Global Education Institute (Incheon MOE) visited New Zealand in May.
WDEC in Wuhan, China	14-15 May	<ul style="list-style-type: none">ENZ in China accompanied New Zealand Ambassador H.E Jonathan Austin to the World Digital Education Conference (WDEC).The visit was leveraged to engage with the Provincial Education Bureau, a key relationship to drive student recruitment in China.
NAFSA 2025	27-30 May	<ul style="list-style-type: none">A New Zealand Pavilion at the 2025 NAFSA Conference in San Diego provided a prominent and valuable platform for the eight New Zealand providers to connect with global education professionals under the New Zealand banner.
TNE partnerships in China	May	<ul style="list-style-type: none">New Zealand had a 100% success rate with Transnational Education (TNE) applications approved for four New Zealand universities and three business divisions of Te Pūkenga/NZIST.
PMSA/LA	June	<ul style="list-style-type: none">25 group programmes which included 197 scholars have now been awarded in the final group round of the Prime Minister's Scholarships for Asia and Latin America (PMSA/LA).16 groups will head to Asia (Japan, India, China, Thailand, Singapore, and Taiwan), while nine groups will undertake their programmes in Latin America (Chile, Colombia, Brazil, and Mexico).
Philippine Delegation in New Zealand	June	<ul style="list-style-type: none">Senior officials from the Philippines Commission on Higher Education (CHED) and Technical Education and Skills Development Authority (TESDA) along with institutional presidents visited New Zealand from 23 – 27 June supported by ENZ, MOE, and the New Zealand Qualifications Authority (NZQA).

		<ul style="list-style-type: none"> Included in the series of meetings with MOE, NZQA, Universities NZ, various tertiary education providers, was an introductory meeting with Minister Reti.
MNZSP update	June	<ul style="list-style-type: none"> The procurement programme for the Manaaki New Zealand Scholarships Programme (MNZSP) schemes is on track with the following activity underway: <ul style="list-style-type: none"> Transition to new suppliers for the Thematic Short-Term Training Scheme and Tertiary Selection. Set-up of supplier contracts for Vocational Short-Term Training; the English Language Training for Officials Scheme. Commencement of procurement for the Tertiary Education Institution Outcome Agreements and In Country English Language Training services. The delivery phase has started for the Manaaki Future State improvement project. An implementation business case was presented to the Investment and Delivery Governance Group (a co-sponsored governance group with members from MFAT and ENZ) in mid-June.

Goal 3 - Support sector capability development

Measure	Actual 2023/24	YTD 2024/25	Target 2024/25	Comment
ENZ's support is valued by the international education sector	77%	79%	75%	Achieved
Provide international education insights that are valued by the sector	New measure	1. 21 ⁵ publications and/or events 2. 95% satisfaction ⁶	1. Deliver at least 10 key insights publications and/or events to NZ Inc. 2. 75% satisfaction	1. Achieved. 2. Satisfaction Achieved: 95% of respondents in the 2025 Sector Survey reported that market insights, research, and data provided by ENZ were important or very important to their organisation.

International Student Experience Survey

The fieldwork for the 2025 International Student Experience Survey was completed in May with the reports currently being finalised. These reports will be provided to the Minister's office and subsequent presentations and interactive dashboards provided to education providers to help them inform their student attraction strategies.

The aim of this survey is to better understand the overall student experience for international students enrolled with a New Zealand education provider, as well as those students who had recently completed their studies. This marks the fifth survey in this series.

ENZ's Sector Survey

ENZ undertook its annual sector survey in June. This survey is an important tool for ENZ to hear from New Zealand international education providers on its performance including which services and support are valued by the sector and what they would like to see more of. Top line results included:

- 79% of respondents agreed or strongly agreed that ENZ's support is valued by their organisation up from 77% in the 2023/24 financial year.
- There was large variation in the services used, with the most common being off-shore events (87%), market insights (60%), and overseas connections (55%). Less common were business

⁵ Some insights include presentations delivered to both the sector and other audiences, and have been counted as insights to the sector.

⁶ This result was reported from the 2025 Sector Survey.



and market advice (30%), enrolment opportunities (24%), and resources to improve student experience (30%).

- All services that were used were deemed highly important for their organisation. Most important were those related to connections, market strategy and support, and intelligence. Less important were branding and marketing and enrolment opportunities.

Peak Bodies Forum

The Peak Body Forum took place on 18 June 2025 in Wellington with all peak bodies attending alongside key government agencies including ENZ, MOE, INZ, MBIE, NZQA and MFAT. Key topics focused on the International Education Going for Growth Plan and INZ presenting on its new ADEPT system.

SIEBA 10th Anniversary

Schools International Education Business Association (SIEBA) recently celebrated its 10th anniversary with a workshop and event in Wellington. SIEBA was established with support from ENZ in July 2015, as a key recommendation of the international education Strategic Roadmaps project. Schools called for leadership, increased capability, greater collaboration, and stronger representation within the wider international education sector. The recommendation was to create a professional body that would bring cohesion to the hundreds of schools, professionalise the sector and grow the business.

Since 2015, ENZ has provided \$2.4 million in funding to SIEBA and has continued to partner on a range of initiatives to support the professional and capability development of the school subsector. This subsector is active in a diverse number of international markets individually, in small clusters, and as part of larger regional and city-based clusters.

Goal 4 - Optimise Education New Zealand

Measure	Actual 2023/24	YTD 2024/25	Target 2024/25	Comment
Percentage of ENZ staff who have undertaken te reo Māori and cultural training	93%	95%	85%	Achieved
Percentage of ENZ staff who agree or strongly agree that ENZ's actions contribute to the safety and wellbeing of its employees	85%	80%	85%	Not achieved: May 2025 wellbeing score likely impacted by high workload and mixed sentiment on return-to-office expectations. No November 2024 survey due to organisation change feedback – result not reflective of full year.

Supporting an effective Crown Entity

Over the quarter, ENZ invested considerable effort in the development of the Growth Plan, which was approved by Cabinet on 30 June 2025. ENZ worked closely with the sector in shaping ENZ's role in supporting international education double its export revenue contribution to \$7.2 billion by 2034.

Alongside the Growth Plan, ENZ developed and finalised its Statement of Intent 2025 to 2029 and Statement of Performance Expectations 2025/26. ENZ ensured that its priorities, areas of focus, and performance measures in these key accountability documents are strongly aligned to the Growth Plan.

ENZ has also engaged with its monitoring agency, Ministry of Education, on a range of topics which have informed their advice to you, including: Business Planning, Procurement and Contract Management, and Finance & People.

ENZ's Pulse Survey

In June, ENZ conducted a Pulse Survey, achieving a strong response rate of 94%. The overall engagement score reached 81%, reflecting a 6% increase since the previous survey in May 2024. Results indicate that staff have a clear understanding of how their work contributes to ENZ's goals and express pride in being part of the organisation. A significant number of comments included positive feedback about ENZ as a workplace. The survey also identified areas requiring improvement to support the achievement of targets set out in the Statement of Intent 2025-2029. These insights are now informing ENZ's performance planning for the upcoming financial year.

Ministerial Servicing

During the quarter, ENZ engaged with the Monitors on its work to develop the Go-to-Market plan, corporate activities and the finalisation of its Statement of Intent and Statement of Performance Expectations. ENZ also continued to provide timely and relevant briefings, reports, and responses to parliamentary questions for the Minister. May was the busiest month (70) during this quarter.

Deliverables	Apr-24	May-24	Jun-24
Briefings and Information Updates	12	7	5
ENZ Correspondence	2		
Ministerial Correspondence			1
Speeches			2
Monthly Update	1	1	1
OIA - ENZ	2	4	2
OIA - Minister			
OIA - Media Request	1	3	
WPQ	15	55	22
Total	33	70	33

5. Risk Management

The Board's strategic risks and ENZ's enterprise risks continue to be actively monitored by the Senior Leadership Team, with bimonthly reporting to the Board and quarterly oversight from the Audit and Risk Committee.

ENZ's risk environment remained largely stable over the quarter. The organisation continues to monitor the effective delivery of the Government's priorities, which remains a key focus for the Senior Leadership Team. There has been encouraging progress in organisational culture-related risks, reflecting the impact of targeted mitigation strategies implemented over recent months.

During the quarter, the Audit and Risk Committee undertook two risk deep dives. The first focused on the financial drivers influencing ENZ's long-term fiscal sustainability. The second examined risks related to the organisation's culture and Te Tiriti o Waitangi commitments, including areas where these responsibilities intersect. This session was timely, coinciding with early results from the recent Pulse Survey (which had a dedicated set of questions related to Te Tiriti). The Committee received an initial view of these insights and will inform early planning for engagement activity in the financial year ahead.

A refresh of ENZ's strategic and enterprise risks for 2025/26 is underway, drawing on feedback from both the Audit and Risk Committee and the Board, to ensure continued alignment with organisational priorities and the Board's risk appetite.

6. Looking Forward

International Education Going for Growth Plan

For 2025/26, ENZ's focus will be on delivering the actions outlined in the Growth Plan with the objective of promoting New Zealand as a destination of choice for international students and doubling export revenue from international education. Alongside this, the implementation of the Go to Market Plans in our key markets, which outlines key activities and sub-sectors this supports, will play a pivotal role in the achieving the Plan's objectives.

One of the first actions will be the development of a new creative platform to start delivering on the Growth Plan. ENZ believes New Zealand could become the world's most meaningful study destination, one that stays true to who we are while connecting with the cultures, values, and needs of globally minded students. The new creative expression is "New Zealand taught me..." and will be communicated through the eyes of New Zealand's alumni. The campaign will go live in August.

CACIE and New Zealand as the Country of Honour

Planning for Country of Honour activities is well underway with 16 institutions confirmed to exhibit on the New Zealand pavilion at the China Education Expo 31 October – 1 November, the exposition portion of the Conference. On the pavilion there will be eight universities, private training establishments, Te Pūkenga/NZIST, and Tourism New Zealand.

ENZ is in the process of formalising a contract with The Haka Experience for three cultural performances during the Conference and Expo in Beijing. Ten performers are anticipated to travel to Beijing to take part. A two-step registration process for New Zealand providers to attend the conference and participate in the Country of Honour initiatives, including the Business-to-Business Networking Session and a NZ-China High-level Education Forum, will open on the ENZ event page in mid-July.



7. ENZ Financial Performance to 30 June 2025

STATEMENT OF FINANCIAL PERFORMANCE		For the 12 months to 30 June 2025		
\$000s		Actual	Full year Budget	Last Year
Operating Revenue				
Revenue from the Crown - Operating		24,951	25,206	27,248
Other revenue		1,997	2,265	1,942
Total operating revenue		26,948	27,471	29,190
Scholarship Revenue				
Revenue from the Crown - scholarships		3,750	3,750	3,560
Total scholarship revenue		3,750	3,750	3,560
Operating Expenditure				
Personnel costs		13,325	14,388	14,669
Contractors & Consultants		346	176	697
Other expenditure		12,490	12,907	13,817
Total operating expenditure		26,161	27,471	29,183
Scholarship expenditure				
Scholarship expenses		3,677	3,750	3,560
Total scholarship expenditure		3,677	3,750	3,560
Net surplus / (deficit)		860	0	8
STATEMENT OF FINANCIAL POSITION		As at 30 June 2025		
\$000s		Actual	Full Year Budget	Last Year
Assets				
Total current assets		8,025	6,181	6,902
Total non-current assets		554	339	755
Total assets		8,579	6,520	7,657
Liabilities				
Total current liabilities		4,407	3,600	4,287
Total non-current liabilities		587	202	644
Total liabilities		4,994	3,802	4,931
Net assets		3,585	2,718	2,726
Surplus made up of:	Full year Actuals			
International Education Programmes	787			
Prime Minister's Scholarships	73			
Surplus/(Deficit)	860			



STATEMENT OF CASH FLOW		As at 30 June 2025	
\$000s		Actual	Full Budget
Cash flows from operating activities			
Receipts from the Crown		28,701	28,673
Receipts from Other revenue		1,679	1,500
Payments to suppliers, employees and IRD		(30,020)	(29,734)
Net cash flow from operating activities		360	439
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Cash flows from investing activities			
Payments for new term deposits		(2,000)	0
Interest received		465	440
Purchase of property, plant and equipment		0	(257)
Receipt from maturity of term deposits		0	0
Net cash flow from investing activities		(1,535)	183
Net cash flow from financing activities		0	0
Net increase/(decrease) in cash		(1,176)	622
Cash at the beginning of the year		2,918	329
Cash at the end of the period		1,742	951

Summary

The result remains unaudited until Audit New Zealand conducts its field audit in October 2025. Based on the interim audit feedback, ENZ does not anticipate any issues receiving the final audit opinion from Audit New Zealand.



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 12 months to 30 June 2025		
\$000s		Actual	YTD Budget	Last Year
Scholarship Revenue				
Revenue from MFAT		74,920	82,185	61,873
Total scholarship revenue		74,920	82,185	61,873
Operating Revenue				
Revenue from MFAT - Operating		4,351	5,540	4,532
Total operating revenue		4,351	5,540	4,532
Scholarship expenditure				
Scholarship expenses		74,920	82,185	61,873
Total scholarship expenditure		74,920	82,185	61,873
Operating Expenditure				
Personnel costs		2,535	2,876	2,539
Other expenses		1,815	2,664	1,994
Total operating expenditure		4,351	5,540	4,532
Net surplus/(deficit)		0	0	0
STATEMENT OF FINANCIAL POSITION		As at 30 June 2025		
\$000s		Actual	Full Year Budget	Last Year
Assets				
Total current assets		18,257	14,570	17,305
Total non-current assets		0	0	0
Total assets		18,257	14,570	17,305
Liabilities				
Total current liabilities		18,257	14,570	17,305
Total non-current liabilities		0	0	0
Total liabilities		18,257	14,570	17,305
Net assets		0	0	0

Summary

The result remains unaudited until Audit New Zealand conducts its field audit in October 2025. Based on the interim audit feedback, ENZ does not anticipate any issues receiving the final audit opinion from Audit New Zealand.