



17 September 2025

S9(2)(a)

Official Information Act 1982 request

I refer to your Official Information Act (the Act) request on 8 August 2025 seeking information as below:

If you could share the documents relating to the development of the International Education Going for Growth Plan with QTI and ITENZ, that will be appreciated.

The following documents have been identified within the scope of your request:

- 2425-233 ENZ Market Assessments cover paper*
- 2425-237 Analysis of the numbers
- 2425-239 The role of agents*
- 2425-240 International Education Plan for Growth to 2034: Draft outline*
- 2425-242 Developing the International Education Plan for Growth
- 2425-263 Draft Education New Zealand Integrated Go to Market Plan*
- Excerpts from ENZ's monthly updates and Quarter Four Report to the Minister*

*Please note that these documents are currently being prepared for release and will be sent to you without undue delay.

The documents listed below are either already publicly available or soon to be publicly available. I am therefore partially refusing your request under s18 (d) of the Act on the basis that the information is already publicly available or will soon be publicly available.

- 2425-237 *Analysis of the numbers*. This will be available on the Ministry of Education's website here - [Advice seen by our ministers - Ministry of Education](#)
- 2425-242 *Developing the International Education Plan for Growth*. This will be available on the Ministry of Education's website here - [Advice seen by our ministers - Ministry of Education](#)
- Draft market plans as attachments to 2425-233 *ENZ Market Assessments* and 2425-263 *Draft Education New Zealand Integrated Go to Market Plan*. This information is already available on Intellilab here - [ENZ Go-to-Market Plans | ENZ IntelliLab](#) (login required).

In relation to the document, *ENZ's Integrated go to Market Plan*, we would like to advise of a correction on page 6. This incorrectly asserts Stats NZ's intention to revise historic figures in September 2025. Stats NZ revised the March 2024 to March 2025 quarters (inclusive) to be

based on the latest Export Education Levy data compiled by the Ministry of Education and updated student visa numbers compiled by Immigration NZ. Stats NZ also revised the March 2024 to March 2025 quarters (inclusive) to better reflect prices of tuition and living costs for New Zealanders studying overseas, and to use updated New Zealand resident arrival numbers.

You have the right to seek an investigation and review by the Ombudsman of this decision. Information about how to make a complaint is available at www.ombudsman.parliament.nz or freephone 0800 802 602. If you wish to discuss this decision with us, please feel free to contact me at Di.Solomon@enz.govt.nz.

Please note that it is our policy to proactively release our responses to official information requests, where possible. Please contact us if you have any questions about this.

Yours sincerely



Di Solomon

Director Government Relations & Communications

Released under the Official Information Act 1987

Information Update

To Hon Erica Stanford, Minister of Education

From Amanda Malu, Chief Executive, Education New Zealand

Date 15 April 2025

Subject Education New Zealand Market Assessments, April 2025

Security level In Confidence

Purpose

1. The attached Market Assessments provide analysis of the potential of 14 key markets currently being considered to support the growth of the international education sector. Each Market Assessment provides options for growth and are designed to inform the development of the International Education Growth Plan.

Context

2. The attached Market Assessments were developed by Education New Zealand (ENZ) for **S 9(2)(j)**
[Redacted]
3. The Market Assessments for **S 9(2)(j)** were developed in February/March 2025, and were previously provided to you. The format of the Market Assessments for these two countries has now been updated to be consistent with the other Market Assessments.
4. The Market Assessments have been conducted at an individual market level. Further work to develop a consolidated view, along with recommended priorities will form part of the development of the International Education Growth Plan.
5. Where appropriate, the Market Assessments have been reviewed by other agencies, including Immigration New Zealand, Ministry of Education, Ministry of Foreign Affairs and Trade, and New Zealand Qualifications Authority. There are elements within the Market Assessments that other agencies would be best placed to take a lead on, such as policy settings. This has been reflected in the other briefings you have received on the development of the International Education Growth Plan.
6. Each Market Assessment covers:
 - Approach to education including international education
 - The economic environment of the market and growth potential

- New Zealand's bilateral education relationship
- In-market competitor activity
- Intent, investment, and strategy of New Zealand's international education providers.

Timing of the market assessments

7. The market projections were based on 2023 international student enrolment data.
8. The global economic and political environment is experiencing a high degree of disruption and uncertainty. The economic indicators and projections used to develop the Market Assessments were largely calculated prior to the recent tariff announcements by the USA. As a result, they are susceptible to change with the rapidly evolving situation.

Summary of the Market Assessments

9. Overall, the international education sector is targeting a return to pre-Covid export revenue of \$4.3b by 2027 and to double the sector's export revenue to \$6b by 2034.
10. The Market Assessments identify key areas of influence, growth sources and enablers that can unlock growth potential. The core principle underlying all growth aspirations is to ensure we deliver 'quality growth' which allows New Zealand to prioritise sustainable international education opportunities which benefit the broader New Zealand economy.
11. The Market Assessments consistently recognise approaches to enhancing growth which can be applied for both short-term and sustainable long-term returns. The five main sources of growth are:
 - i. Investment: Develop New Zealand's equity as an international education destination: Insight driven marketing to increase awareness, preference and enrolment decisions
 - ii. Diversification: Increase New Zealand's share within ENZ's current priority markets outside of S 9(2)(j), and explore new market opportunities
 - iii. Partnerships to enable offshore delivery: Explore the growing transnational education and hybrid models of education delivery
 - iv. Promote settings: Marketing based on policy settings and study pathways, including the Green List
 - v. Product development: Explore opportunities to support the growth of the education products and services subsector, and the diversification of course offerings.
12. For both short and long-term growth targets, there are core enablers that can unlock growth. These will be explored further with recommendations to be submitted through the International Education Growth Plan process.

Next Steps

13. ENZ will work to finalise the attached Market Assessments. This will include reforecasting the market projections to 2034 based on the 2024 full year enrolment numbers.
14. ENZ intends to regularly refresh the Market Assessments to feed into ENZ's planning processes.

Released under the Official Information Act 1982

Information Update

To Hon Erica Stanford, Minister of Education

From Amanda Malu, Chief Executive, Education New Zealand

Date 30 April 2025

Subject The role of education agents in growing international education

Security level Unclassified

Purpose

1. This paper is one paper in a series of advice to support the International Education Plan for Growth.
2. It provides an overview of the role of education agents or advisors, their importance as a recruitment channel for NZ and how we can better partner with them globally to support the growth of international education for New Zealand.

Recommended action

Education New Zealand (ENZ) recommends that you:

- a. **Note** the importance of agents in driving growth in international education, from raising awareness of New Zealand as a study destination, shifting student preference to contributing to market diversification.
- b. **Note** the various roles of agencies engaged with agents including Immigration NZ (INZ), the New Zealand Qualifications Authority (NZQA) and ENZ in the provision of information, advice, training and supporting promotional efforts to ensure optimisation of the channel.
- c. **Note** that agencies have identified a range of measures to enhance the agent channel and drive improved growth outcomes.

Definition of agents and how they operate

3. An education agent is a person or organisation that deals directly with prospective international students on behalf of education providers. They are sometimes referred to as international student recruitment agents or international student recruitment representatives. Education agents operate under different business models, ranging from B2C (business-to-consumer) which are involved in direct recruitment through to

B2B (business-to-business) which contract sub-agents to facilitate the recruitment process.

4. Agents are contracted directly or indirectly to deliver a range of services to potential students and the provider. Student services ordinarily include education counselling, such as course and institution matching, and assistance with academic and visa applications. Anyone can help students fill in their visa application form however any individual providing immigration advice either in New Zealand or offshore must be licensed by the Immigration Advisers Authority (IAA), unless exempt under the Immigration Advisers Licensing Act 2007 (the Act).

This could be:

- a licensed immigration adviser (LIA), or
 - someone who is 'exempt' and does not need to be licensed, such as a lawyer, diplomat or an education agent based offshore.
5. Education agents help prospective students find an institution with programs that meet their needs. In doing so, agents promote countries, regions and education providers therefore contributing to market and sector diversification. Many agents offer additional services, which all support students and their families, and the international education industry. While some education agents also offer post-enrolment services and most remain in touch with their placed students beyond the first few months, the services ordinarily covered by the education provider and education agent contract finish once enrolment is confirmed.
 6. Agents are commercial businesses and are paid a commission by education providers for the recruitment service they provide. Some agents also charge a fee to prospective students for additional services, such as support with accommodation and visas. Commission structures vary depending on the sub-sector, for example universities paying commission on first year fees, whereas English language pay commission on the full tuition fees.

Their role and why they're important

7. Education agents are important recruitment partners for New Zealand's international education sector and a key partner in promoting NZ as a top international study destination. Historically, over 50% (depending on the sub-sector) of all international students enrolling in New Zealand education used an education agent.¹
8. While we lack definitive data on agent utilisation by channel, we can point to anecdotal evidence which highlights their importance:
 - 2024 research from Studymove reports that 44% of international university students in NZ received assistance from an agent vs 86% for Australia (based on 2022 numbers). In the same study, most NZ universities indicated they want to

¹ 2020 Studymove benchmark for NZ universities.

increase their engagement with agents and point to the need to drive greater awareness of NZ as a study destination with agents.

- Schools are heavily reliant on agents, anecdotally at least 80%. In response, the international education peak body for schools, the School International Education Business Association (SIEBA), has developed an agent registration service to support schools.
9. Agents will play a role in achieving growth, as they serve as frontline representatives of New Zealand's education sector and are our largest recruitment channel. By strategically engaging and equipping agents with high-quality resources, market insights, and targeted support, we aim to empower them not only to promote New Zealand but also to raise awareness and preference for NZ education. This, in turn, will drive enrolment growth, support entry into new markets, and directly contribute to the export earnings growth objective.

How government agencies currently work with agents

10. New Zealand has various regulatory levers associated with quality assurance of education agent practice and behaviour, with different government agencies responsible. Immigration NZ (INZ) sets migration policies and the New Zealand Qualifications Authority (NZQA) administers the Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021 (the Code). Education New Zealand (ENZ) works with education agents to provide information, training and support promotional efforts. The Immigration Advisers Authority (IAA) is responsible for maintaining a register of licensed immigration advisers and protecting people who receive immigration advice.
11. INZ publishes student visa agent approval rates for a select number of countries (those where there is some volume of applications represented by agents), [S 9 \(2\)\(j\)](#). This serves as a performance indicator for targeted agent partnerships.
12. INZ's work with education agents and licensed advisors includes the following:
- INZ hosts a regular forum called the Immigration Reference Group (IRG). The members are either Licensed Immigration Advisers (LIAs) or have exemption as immigration professionals under the Immigration Advisers Licensing Act 2007, such as lawyers. The purpose of the IRG is sharing of up-to-date information between INZ and the industry. It also aims to create a greater degree of understanding across the immigration system, and in turn contributes to the improvement of immigration processes.
 - INZ has strong engagement with the LIA network, including their associations and representative bodies. LIAs are both onshore and offshore.
 - INZ has a less direct relationship with offshore based 'agents' who are not regulated because of exemption under the Immigration Advisers Licensing Act 2007 to the provision of advice pertaining to student visas.
 - Strategic engagement with offshore agents is through collaboration with ENZ and/or peak bodies. These may include webinars, seminars, expos, agent workshops and retreats. The intent is to deliver content to improve application quality by educating

- and updating agents on policy and process. These interactions with the agent market are supported newly appointed engagement advisers in India and China markets.
- INZ provides a devoted email address to respond to complex queries from agents educationagents@mbie.govt.nz. This service has back end support from student visa subject matter experts based in our primary student visa processing site.
13. When providers partner with agents, the Code requires the provider to have a process for managing and monitoring these agents (Outcome 9, Process 2). While the Code does not regulate agents directly, it does hold providers to account for activities organised on their behalf, which would include the actions of their agents. NZQA can receive complaints from international learners in relation to the Code and its requirements.
 14. NZQA provides capability-building support for education providers, including running Code workshops, publishing a guide to managing education agents, and providing information about Outcome 9, Process 2 of the Code. NZQA also has a dedicated email address to respond to code-related queries at code.enquiries@nzqa.govt.nz.
 15. To contribute to consistent promotion of New Zealand as an education destination ENZ focuses its work on:
 - Delivering accurate information to agents, through collaboration with NZ Inc agencies.
 - Supporting training for agents through delivery of seminars, online channels such as AgentLab, webinars, co-workshops with NZ institutions and contribution to external training providers such as ICEF Academy.
 - Supporting select agents to promote NZ as an education destination, using INZ data to inform agent selection.
 16. This activity is designed to enhance the agent channel and support the broader education sector, by working to support the sector and enhance the interconnectedness of agent/provider activities and achieve sector growth. ENZ delivers resources and training through the AgentLab platform and in-market staff presence.

Opportunities to better partner with agents to grow numbers

17. As a key recruitment channel, agencies have identified ways to partner with education agents to drive growth outcomes in the future.
18. International education growth will require:
 - Increased awareness of NZ's education offerings among agents.
 - Enhanced agent knowledge and skills resulting in greater global promotion of New Zealand's education offerings through high-performing agents advocating for New Zealand.
 - Increased student enrolments through strengthened agent partnerships and joint marketing initiatives.
 - Increased number of student applications and approval rates from agent referrals and higher quality student applications.



- S 9 (2)(f)(iv)
[Redacted text]

21. Focus areas for agencies will need to be tested with the sector as part of engagement.

Released under the Official Information Act 1982

International Education Plan for Growth to 2034: Draft outline

Summary

This will be a one page diagram of the three areas of focus for government agencies, the key actions to be delivered (e.g. ENZ's marketing plan), and how we will measure progress in working to achieve the overall target of doubling export revenue by 2034. An example is outlined below.

Double international education export revenue to \$6.2 billion by 2034



Introduction

It will outline the key components of the international education ecosystem that will be required to work together in order to drive sustainable growth to 2034.

It will identify the interconnectedness of the constituent parts of the international education sector and the various roles the government agencies play to promote the New Zealand offer, manage the risks inherent in growth and to ensure the integrity of New Zealand's immigration system and the domestic education system is not compromised.

Key to the context is understanding the interplay between the education and immigration policy settings to attract genuine and contributing international students to New Zealand, and the impact of the levers available within the system on the education providers' ability to diversify the sector's collective offerings, quality assurance and monitoring to manage system risks, and maintain quality standards.

Context and environment

This section will lay the foundations for the actions sitting under the three areas of focus. It will briefly explain the contextual narrative of the size, shape and value of the sector prior to the pandemic and the recovery journey so far. It will include a breakdown by subsector and by target markets.

This section will also examine how the New Zealand sector can navigate dynamic market conditions over the next decade to build a resilient, responsive and agile sector. Global competitive, economic and geo-political factors and how they impact student flows and demand will be included.



Opportunities for growth

This short section will explore the likely impact of the global operating environment on the Plan based on Minister Stanford's preferred approach.

It will combine:

- lessons learnt from the rapid growth period in the mid-2010s, and recent experience in Australia and Canada
- the opportunities identified in ENZ's draft Market Assessments (ENZ ref 2425-233)
- the forecast growth potential by the total number of enrolled international students from the *Analysis of the numbers* information update (ENZ ref 2425-237)
- the sector's views on where they are focusing their marketing efforts (which will be provided to Minister Stanford on 21 May 2025).

Before drafting this section, agencies will need to undertake more work after engaging with the international education sector on where they are focusing their marketing efforts.

Three areas of focus

Each area of focus section will include:

- the short, medium and long-term actions to be undertaken by each agency, the timeline and how progress will be measured
- a short explanation of the rationale for why agencies are focusing on this area and how the actions will deliver on the overall target of doubling export revenue.

The area of focus sections will reflect Minister Stanford's preferred approach for developing the International Education Plan for Growth (ENZ ref 2425-242) and her decisions regarding the immigration options to support international education sector growth (MBIE ref REQ-0012473).

Marketing and promotion to attract international students

Actions	Agencies	Timeline	How we will measure progress
Implement marketing plan	ENZ		Increase in the number of international students coming from ENZ's key markets
Diversify source markets for international students	ENZ, MBIE, MFAT		Grow market share in targeted markets other than China and India



This section will provide the rationale for the marketing and promotional activities to be delivered by Education New Zealand (ENZ). It will summarise ENZ's marketing plan which is currently being developed.

It will identify the key markets that ENZ is focusing on and the subsectors that are expected to deliver growth from each market. It will show that ENZ is focused on stimulating demand that can be met within the sector capacity to achieve the growth target.

System settings to create opportunities and manage risk

Actions	Agencies	Timeline	How we will measure impact
Develop an engagement approach for prominent education agents in key markets S 9 (2)(j)	MBIE, ENZ	July 2025	Increase in student visa applications via prominent education agents
Extend eligibility for in-study work rights in line with in-study work rights for all tertiary students on approved exchange or Study Abroad programmes, including programmes that are one semester in duration	MBIE	Early 2026	Increase the number of tertiary students on approved exchange or Study Abroad programmes
S 9 (2)(f)(iv)	S 9 (2)(f)(iv)	S 9 (2)(f)(iv)	

This section will set out any policy changes that will be delivered to create opportunities for growth while managing risks. It will also include any operational changes required to ensure that any new or elevated risks resulting from policy setting changes will be effectively managed by agencies. Any policy setting changes and operational changes will reflect the lessons learnt from the rapid growth period in the mid-2010s.

Excellent education and student experience

This section will discuss this foundational element for growing international student enrolments and achieving the growth target. It will briefly discuss:

- the role that alumni can play in influencing prospective international students by raising awareness of New Zealand education
- the importance of New Zealand education having a high-quality reputation because the reputation of education systems is a driver of preference for prospective international students when they are considering where to study
- the importance of international students having an excellent student experience to create engaged alumni who are willing to promote New Zealand education.

Bringing these factors together highlights that an excellent education and student experience are essential foundations to enable us to achieve the growth target. Illustrative examples of actions that could support this foundation are:

- Changes to variations of conditions for a student visa so international students who want to switch to a lower-level course or change provider should be required to apply for a new visa
- Improve user experience by ensuring the student visa application form gives applicants clear prompts for the evidence (including financial evidence) required based on their circumstances.

Released under the Official Information Act 1982

DRAFT: ENZ's Integrated go to Market Plan

2025 – 2027 (and plan to 2034)

Released under the Official Information Act 1982

**THINK
NEW**[®]



DRAFT: ENZ's Integrated go to Market Plan

Executive summary

Education New Zealand (ENZ) has been tasked to deliver on the Government's ambition to double the value of international education sector, taking export earnings from over \$3b to \$6.2b by 2034. International Education growth fuels New Zealand's economic prosperity, strengthens communities, enhances global connections, and fosters a skilled and adaptable workforce. It creates local jobs, and builds global skills and cultural competencies, greatly contributing to our local communities. Our strategic goal is to enable a sustainable, high-quality international education sector for New Zealand.

To achieve growth, ENZ draws on our core functions and capabilities in marketing and international engagement, to:

- Raise awareness of New Zealand as a study destination through outstanding marketing and promotion
- Influence student choice through our onshore and offshore partnering and sector engagement.

We will also support the delivery of education diplomacy and services offshore and administer scholarships through delivering the Manaaki New Zealand Scholarships programme.

Our plan details the evidence-driven, tailored approaches we will take to stimulate demand, where growth will be realised, how we will measure progress and adapt to dynamic market shifts over the coming nine years to 2034.

Our Go to Market plan reflects ENZ as an integrated business, utilising our established offshore teams and network of relationships in market, with modern marketing platforms and approaches to promote New Zealand as a study destination.

Core to the development of this plan is:

- A clear line of sight from evidence to intervention – we have used data to inform strategic approaches to market. Our model uses a logical flow of data from environmental scan to market assessment and selection, through to refined interventions we can have confidence in.
- Collaboration across New Zealand Inc, creating shared understanding between ENZ and INZ about risk and opportunity to assure the effectiveness of our Go to Market approaches
- Engaging with the sector through peak bodies to understand provider capacity for growth and barriers to that growth
- Leveraging our existing toolsets and approaches that have supported growth in the sector between 2022 and 2024¹. We are harnessing and optimising our approaches and delivery channels to best effect through strategic choices at the market and subsector level.

We have drawn from environmental scans, conducting detailed market assessments that reflect the current and potential growth opportunities by sub-sector, consulting partnering with a top tier consultancy firm to build on our extensive data and develop models to quantify and model growth scenarios, and selecting the right levers and channels to stimulate demand and foster growth. This work, along with collaboration with our partner agencies to understand the impact of system levers such as policy and immigration setting changes, has culminated in a sophisticated set of market approaches and interventions that will deliver on our commitments to

¹ Our graphs in this document do not include

growth over this period but can be provided in v2.

Government. *We have provided several examples of these plans in this plan, with further tailored plans to come by June 2025.*

Our Integrated Go to Market Plan for growth is the lifeblood of our operations at ENZ, and our primary focus. The plan is tightly integrated with our strategic outcomes framework, Statement of Intent and Statement of Performance Expectation¹. This focus is reflected in our business plan with 80% of the 2025/26 plan and 81% of all organisational resources dedicated to executing the plan.

Released under the Official Information Act 1982

ENZ's Integrated Go to Market Plan on a page

Vision	Enable a sustainable, high-quality international education sector for New Zealand							
Objectives	Raising awareness of New Zealand as a study destination through strategic marketing, promotions and scholarships Influencing student choice through our onshore and offshore partnering and sector engagement.							
Target Audience	Primary: Globally Mobile Learners, Parents & Guardians Secondary: Professional Education Specialists and Student Influencers							
Goals	Win the hearts and minds of students and influencers Strengthen Global Distribution channels Drive Sustainable Commercial Growth							
Imperatives	Ignite Brand Engagement		Target and Diversify with Evidence		Unlock Next Level Digital Impact		Align Scholarships to Outcomes	
	Strengthen NZInc System Integration		Advance Government to Government for Education		Build Commercial Capability		Foster High Trust Partnerships: Sector & Agent	
Initiatives	Global Brand Pull	Market Edge Intelligence	Agent Network Model	Sector Fame Story Engine	24/7 AI Service Platform	In Market Experiences	Education Diplomacy	Tailored Market & Subsector Plans
Enablers	Immigration Settings		Market Assessments		Student Experience		Product Development (TNE etc)	
	Performance Evaluation		Social Licence		Product Development (TNE etc)		NZInc	

Initiative Implementation Horizon Plan

Initiative	Horizon 1 Months 1-4	Horizon 2 Months 5-18	Horizon 3 Months 19-36
Global Brand Pull	Develop new Brand Proposition and Creative Direction Review and Define Future state digital interface Commence tech build and develop new ways of working for Scholarships	Activate brand Proposition across priority markets and subsectors Design and Deploy unified digital touchpoints across key audience journeys Finalise and leverage Manaaki Scholarship improvement program	Amplify Brand Proposition to drive preference and global distinctiveness Optimise and scale the digital state to enable seamless, personalised experiences Embed new ways of working and deliver outcomes based approach to scholarships
Education Edge Intelligence	Refine Education Edge Intelligence portal	Pilot enhancements of the intelligence portal with priority data sets and early adopters	Maximise potential to drive insights, foresight and sector wide decision making
Agent Model Network	Agent Model defined and agreed	Agent Engagement model implemented and targeted partnerships with clear outcomes underway	Review Agent Model results and refine approach
Sector Fame Story Engine	Launch new Sector Fame story telling across Digital	Scale story telling impact through co-creation and partnerships	Embed Sector fame as a global platform to drive sustained preference
24/7 AI Service Platform	Concept develop the 24/7 AI service Platform	Trial AI platform solutions to deliver real time support and engagement	Scale AI platform to provide personalised always-on experience at global scale
In Market Experiences	Evaluate & Deliver a Blueprint for In-Market Experiences	Activate Pilot In-Market Experiences in priority markets to test impact and engagement	Scale High Impact experiences to drive global preference
Education Diplomacy	Identify strategic Government to Government opportunities and define Education Diplomacy priorities	Activate bilateral and multilateral opportunities which align education with trade, talent and diplomacy goals	Position NZ as a trusted Government to Government partner in Global Education systems and policy development
Tailored Market & Subsector Plans	Define and Develop Tailored Market and Subsector Plans	Activate Market and Sector Plans	Optimise and scale plans to maximise impact and global positioning

Approach to growth

Our approach considers where opportunities to accelerate growth exist now, alongside managing core markets from which New Zealand traditionally attracts international students. This market categorisation pinpoints where, geographically, we will direct marketing and engagement resourcing to capitalise where there is high potential for new growth while maintaining our relationships and reach into our core markets.

Our market selection approach considers factors such as the size of the opportunity, which sub-sectors have high growth potential, and our ease of access to that market.

Our projections take account of:

- Market selection (assessment model, sector input) – size of prize and sectors of focus – validate the approach
- 2024 enrolment figures (actuals). This represents the latest full year set of international student information.
- Indicative projections for 2025. Although these figures are incomplete and subject to change, this information is consistent with recent (post-COVID) trends, where several subsectors have experienced annual higher than historic levels. The next opportunity to review this will be when April SDR/ Term One enrolment data is available.
- Expected growth in export education values per student.

Due to significant uncertainty in published export education data, including Statistics New Zealand's intention to revise historic figures in September 2025, charts and other estimates in this document focus on student enrolment volumes. This approach provides greater transparency about the drivers and quantum of future projections, as well as supporting more direct comparisons against historic trends.

- Note that the modest levels of growth in student volumes expected between 2027 and 2034 reflect conservative assumptions about the level of investment and intervention by ENZ and sector stakeholders in the medium to long term.
- Export education revenue can nevertheless be expected to continue to rise over this period, based on historic trends. Average dollar per student figures have grown consistently in recent years (Statistics New Zealand – annual export education revenue). Applying this trend to post-2028 projections indicates that total revenues from international education, measured in \$ NZD, will grow significantly to 2034 and beyond.



Using the market assessments, sector input and our in-market institutional knowledge we're using the following market categorisation matrix to focus ENZ's investment on short-term growth.



NURTURE	GROW
<p>Focus on establishing profile and reputation</p> <ul style="list-style-type: none"> • Invest in building Awareness • Target quality, sustainable leads • Long term growth potential -future 'Grow' market • Environmental change/Diversity play • Government Agency & Sector alignment 	<p>Focus on winning share.</p> <ul style="list-style-type: none"> • Grow ahead of the market & competition • Strengthen awareness and target quality, sustainable leads • Markets of rapid growth potential • Environmental change/Diversity play • Government Agency & Sector alignment
MANAGE	CORE
<p>Manage current profile and visibility</p> <ul style="list-style-type: none"> • Maintain numbers but growth profile not aligned due to barriers of funding • Maintain reputation through key elements such as G2G, Scholarships and Sector hosting • Maintain key partnerships to continue visibility of a NZ education 	<p>Focus on maintaining share</p> <ul style="list-style-type: none"> • Grow with the market • Invest and optimise lead conversion and long-term relationships • Enhance Sector support and marketing efficiencies • Government Agency & Sector alignment

Providers will continue to invest in a broader mix of markets – the above sets parameters for ENZ investment. Sub-sectors have expressed interest in a number of other markets with growth potential – we will work with the sub-sectors to undertake risk and opportunity analysis as resources allow.

We have set out below for each of the nurture, grow, manage, and core markets how we project enrolments to grow over time. If that level of growth is seen, then we can anticipate a corresponding increase in revenue. Specific levels of revenue per student and by subsector can be subject to considerable variance. Estimates are based on a conservative average per enrolments basis and presented in NZD.

As ENZ usually refers to enrolments i.e. headcount as the primary published measure of student volumes, charts and analysis below replicate this approach. It should be noted that revenue per student can vary considerably by a range of variables including region of study, level of study, nationality, subsector and course duration.

Further high level information on the approach to projecting growth can be found in **Appendix A**. Statistics NZ Export Education Revenue for 2023, noted below, is year end December 2023.

Core Markets

S 9(2)(j)

Released under the Official Information Act 1982

Grow Markets

S 9(2)(j)

Released under the Official Information Act 1982

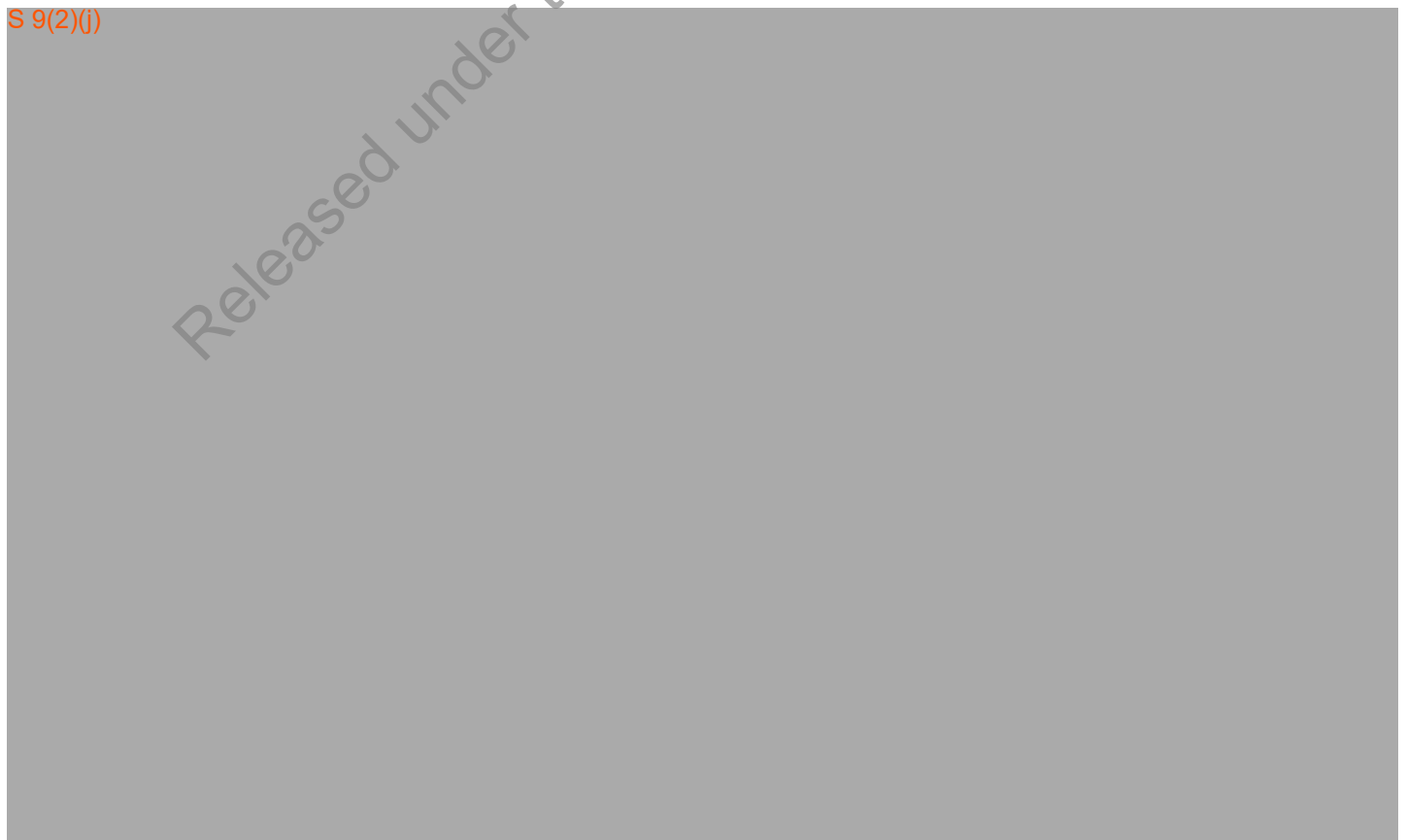
Nurture Markets

S 9(2)(j)



Manage Markets

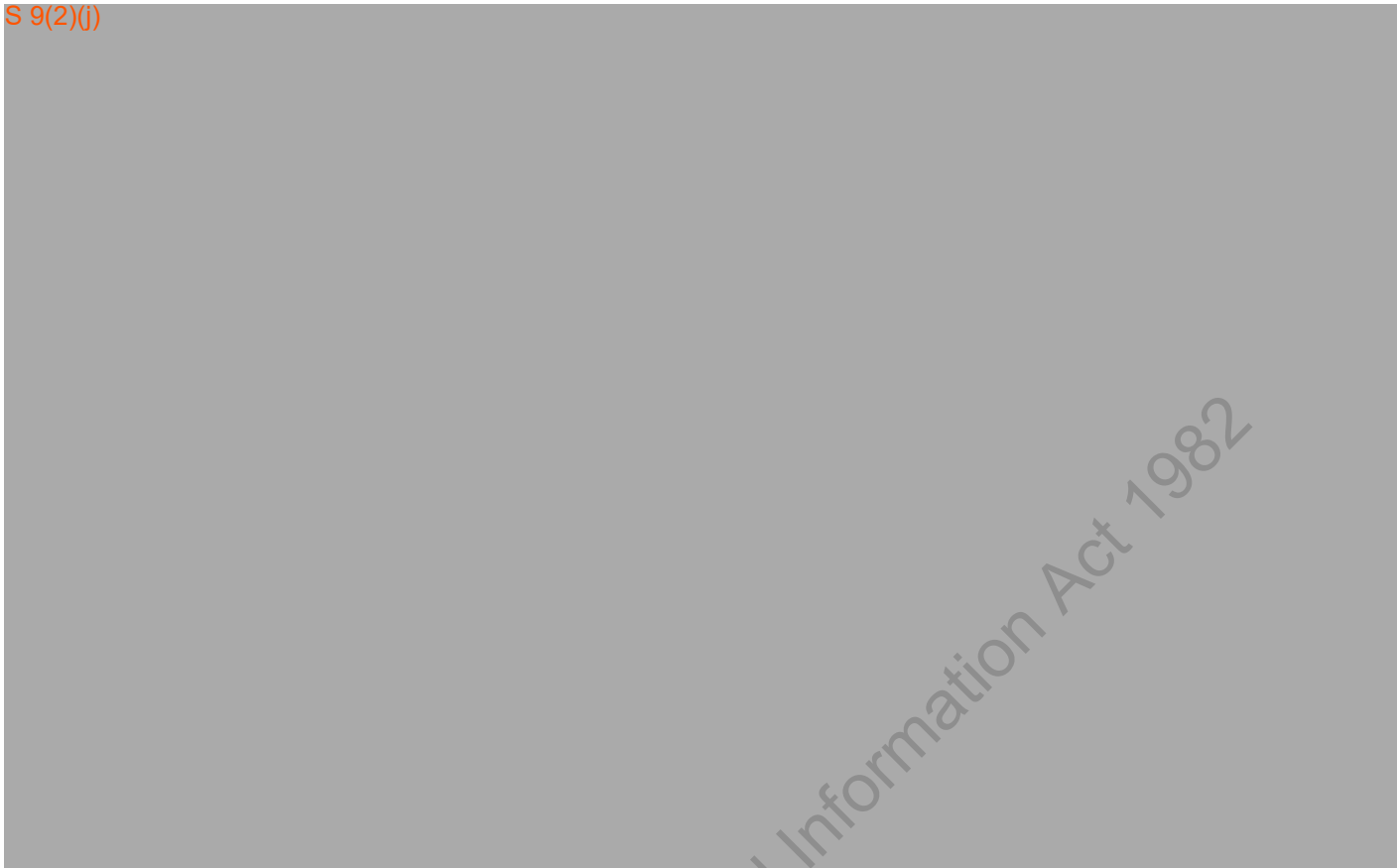
S 9(2)(j)



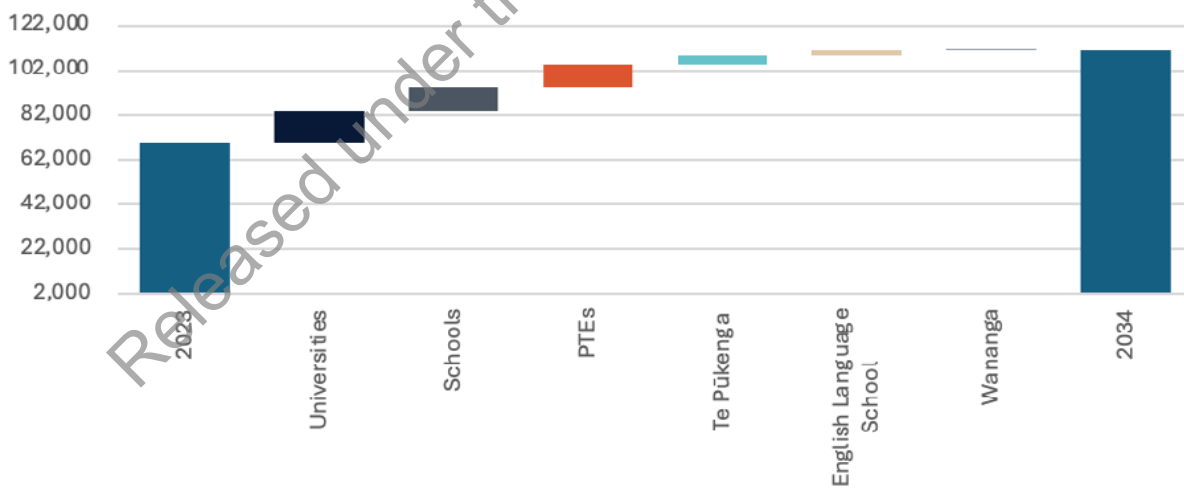
S 9(2)(j)

Released under the Official Information Act 1982

S 9(2)(j)

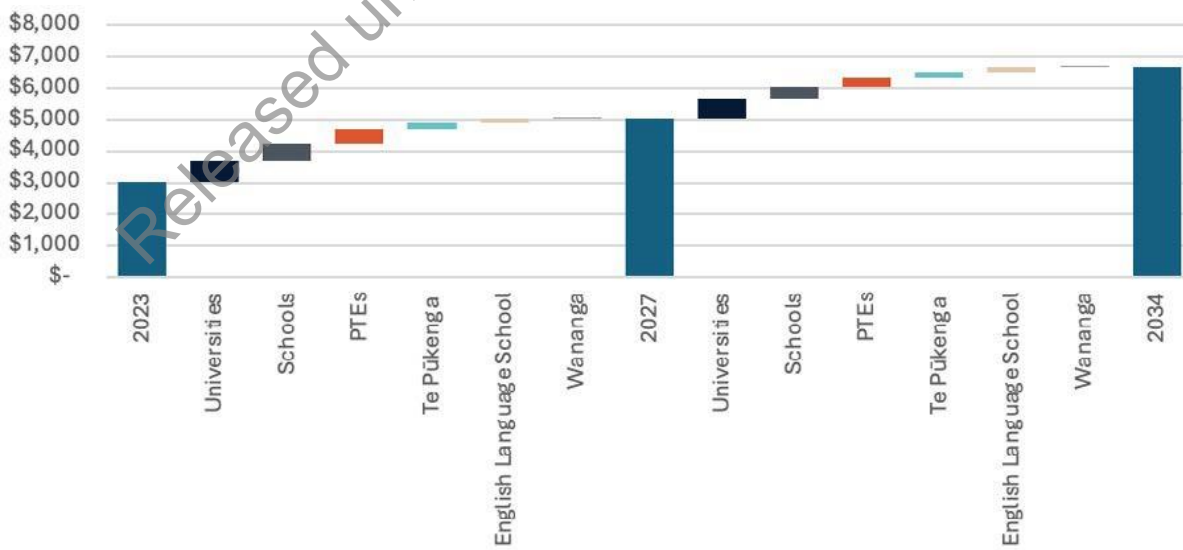


Projected student enrolments by subsector, 2023, 2027 and 2034



S 9(2)(j)

Projected revenue growth by subsector, 2023, 2027 and 2034



ENZ's Integrated 'Go to Market' Plan

ENZ's Integrated 'Go to Market' Plan and Horizon Plans are included above. Detailed explanations are included in **Appendix B**.

Whilst there will be a suite of initiatives to support the sector to grow, below are examples of market activation and specific sub-sector support to drive growth:

- **NZIST:** support to rebuild their brand in key markets (eg S 9(2)(j)) & taking an all of NZ Inc approach to growing S 9(2)(j))
- **Universities:** partnership approach to optimise efficiency and impact of collective investment in key markets
- **Schools:** collaborate to target right market segments into the right schools (eg short-term study groups from S 9(2)(j)) and continue to drive growth in core markets
- **English Language Schools:** drive growth in S 9(2)(j) support with digital marketing in S 9(2)(j) & partner with sector and INZ in S 9(2)(j) to raise awareness and open up market access in a sustainable way
- **PTEs:** partner to drive market development in S 9(2)(j))
- **Wānanga:** partner to understand and support growth capacity and aspirations

Released under the Official Information Act 1982

Accountability

The impact of the Integrated Go to Market plan will be measured by the growth of enrolment numbers and the economic contribution of international education to New Zealand. The sector valuation includes wider system measures impacted by a range of contributors and shared amongst ENZ, the sector and NZ Inc.

The table below details the growth targets for sector valuation and enrolment numbers.

Measures

Measure	2023/24 Actual	2024/25 Projection	2027/28 Projection	2034/35 Projection
The economic contribution from international education is increased to double the export value of international education by 2034*	\$3.1b	\$3.2b	\$5.1b	\$6.8b
Increase in international student enrolments	69135	85000	105726	112319

The export value captured in the tables are based on Stats NZ figures

ENZ's contribution to the system measures are our marketing and promotional activity to increase student/parent awareness of, and preference for, New Zealand as a study destination. Our work ultimately drives leads to New Zealand providers. ENZ will carry out its marketing and promotional activity within the context of diversifying New Zealand's source markets for international students.

Measures

	2023/24 Actual	2024/25 Actual	2027/28 Target	2034/5 Target
Grow brand awareness in the markets we operate in	36%	40%	>or=40%	>or=40%
Maintain brand preference in markets we operate in	4 %	7%	7%	7%
Increase number of leads to providers***	69134	55,820 (ytd)	85,000	92,000
Diversify New Zealand's source markets for international education: S 9(2)(j)	S 9(2)(j)	S 9 (2)(j)	S 9 (2)(j)	S 9 (2)(j)
S 9(2)(j)	S 9(2)(j)	S 9 (2)(j)	S 9 (2)(j)	S 9 (2)(j)
S 9(2)(j)	S 9(2)(j)	S 9 (2)(j)	S 9 (2)(j)	S 9 (2)(j)

Integral to ENZ's marketing and promotional activity is working in collaboration with the sector and NZ Inc (as described) and ensuring responses are data driven. This activity will be measured by...

Measures

	2023/24 Actual	2024/25 Actual	2027/28 Target	2034/5 Target
ENZ's support is valued by the international education sector	77%	75%	80%	80%
ENZ's international education insights are valued by the international education sector and NZ Inc agencies: Number	N/A	27	Deliver at least twenty key insights publications and/or events to the sector & NZ Inc	Deliver at least twenty key insights publications and/or events to the sector & NZ Inc
Satisfaction	N/A	100%	85%	85%

Ongoing monitoring and responding to change

Globally, the international education sector reacts to geopolitical, economic, environmental and individual market policy changes to name a few. ENZ and the wider sector must remain flexible to respond to the

relevant changes. ENZ will stay abreast of these changes and amend relevant measures and responses as appropriate.

Budget allocation to growth activity

The ENZ Integrated Go to Market Plan will be delivered within our existing baseline funding, and represents leveraging of our strategic assets including our digital marketing platforms, data and insights, and our in-market presence. For 2025/26, 81% of our baseline funding will be directed to executing the plan. The table below details the proportional split of ENZ's budget to activities within the plan, The remaining budget will fund overheads and organisational resilience activities.

International brand & digital	International presence, partnerships and promotion	International research and Insights	Total investment %
22%	55%	4%	81%

Released under the Official Information Act 1982

Appendix A: International Student Numbers Projections Tool

Projections contained in this document have been generated from the beta International Student Numbers Projections Tool. The most recent update to this tool was the inclusion recent data supplied by the Ministry of Education.

The tool supports exploratory analysis of international education projections in 2025 and beyond. It offers the flexibility to consider alternative baseline levels, drivers of growth, and per-student revenue projections.

Input data, growth, and revenue assumptions can be modified. Projections for 2027 and 2034 are contained in this document and alternative scenarios can be easily explored.

The flexibility of this tool, as well as the range of potential inputs, reflects that future projections will always involve a degree of uncertainty. Scenarios have been developed by ENZ with the support of EY to ensure that judgements about sector performance and other relevant trends can be considered explicitly and transparently.

An international student enrolment is someone who is a non-resident of New Zealand and who has entered New Zealand expressly with the intention to study; or has enrolled with a New Zealand provider offshore, where the educational programme is delivered in-market.

By default, the tool compares revenue to 2023 figures.

Released under the Official Information Act 1982

Appendix B: Strategic Education Go-To-Market Plan Summary

Goals

Our goals are the outcomes we seek from our activities

Win the hearts and minds of students and influencers: Develop a compelling brand and experiences that deeply engage prospective students and their influencers, building strong emotional affinity for New Zealand education.

Strengthen global distribution channels: Enhance education delivery channels (such as education agents and the Study with New Zealand platform) both domestically and internationally to improve the impact, accessibility and appeal of New Zealand study programs.

Drive sustainable commercial growth: Drive sustainable revenue growth by increasing student enrolments and expanding into new markets and diversified offerings.

Imperatives

Our imperatives describe the specific settings and capabilities required to enable achievement of our goals

Ignite Brand Potential Engagement: Leverage compelling branding and marketing campaigns to create an emotional connection with target audiences, strengthening the global appeal and reputation of New Zealand education.

Unlock Next-Level Digital Impact: Use tech and data to drive reach, relevance, and results.

Strengthen NZInc System Integration: Ensure cohesive coordination among government bodies, education providers, and industry to present a unified and strategic international education approach.

Build Commercial Capability: Strengthen the commercial skills and capabilities of ENZ so that we operate effectively in competitive markets and capitalise on new opportunities.

Target and Diversify with Evidence Use data and evidence driven research to identify high-potential markets and student groups. Prioritise market diversification across regions and subsectors.

Align Scholarships to Outcomes: Design and implement scholarship programs linked to clear outcomes to demonstrate tangible impact for NZ and partner countries.

Advance Government to Government for Education:

Establish and leverage direct government-to-government partnerships to facilitate education agreements, policy alignment, and cooperative initiatives.

Foster High Trust Partnerships (Sector/Agent): Build strong, trust-based relationships with educational institutions and international education agents to ensure ethical collaboration and sustained support driving growth outcomes.

Initiatives

Our initiatives are the activities we will undertake to raise awareness of, and influence preference for, New Zealand as a study destination.

Global Brand Pull: Launch a high-profile global branding campaign to showcase New Zealand education's unique advantages and raise awareness in key international markets. Integrate scholarships to accelerate impact behind brand engagement.

Education Edge Intelligence: A shared intelligence portal to unify market data, insights and best-practice learnings across the sector led by ENZ. Ultimately 'Education Edge' gives the entire education sector a strategic competitive advantage through collaboration and shared knowledge.

Agent Network Model: In partnership with INZ, implement an improved agent network model that standardises training and engagement with recruitment agents to increase effectiveness in student outreach and enhances education provider collaboration with agents.

Sector Fame - Story Engine: Utilise a dynamic storytelling engine to continuously create and distribute compelling narratives about New Zealand's leading study sectors and success stories. Celebrate quality and strengthen education reputation.

24/7 AI Service Platform: Advance our AI-driven platform providing round-the-clock support and information to prospective students and partners worldwide, improving responsiveness and service quality.

In-Market Experiences: Organise immersive in-market events and experiences (e.g. roadshows, delegations, fairs, events) to directly engage students, parents, and influencers and showcase New Zealand's educational environment.

Education Diplomacy: Maintain government to government relationships, contributing to NZ's diplomatic efforts, building partnerships to promote New Zealand education abroad.

Tailored Market & Subsector Plans: Develop tailored go to market plans for each target country and education subsector, addressing specific needs and opportunities to optimise local impact.

Enablers

Our enablers describe our ways of working with others, and the system settings that create the environment for growth opportunities to be capitalised upon. They include our research and analysis to inform our Go to Market initiatives, and the settings that contribute to New Zealand's attractiveness as a study destination.

Immigration Settings: Understand visa and immigration settings to support the promotion of international education by facilitating student entry, study stays, and post-study work opportunities in New Zealand.

Market Assessments: Conduct ongoing market research and analysis to inform strategic decisions, ensuring initiatives remain responsive to trends, demand shifts, and competitive landscapes.

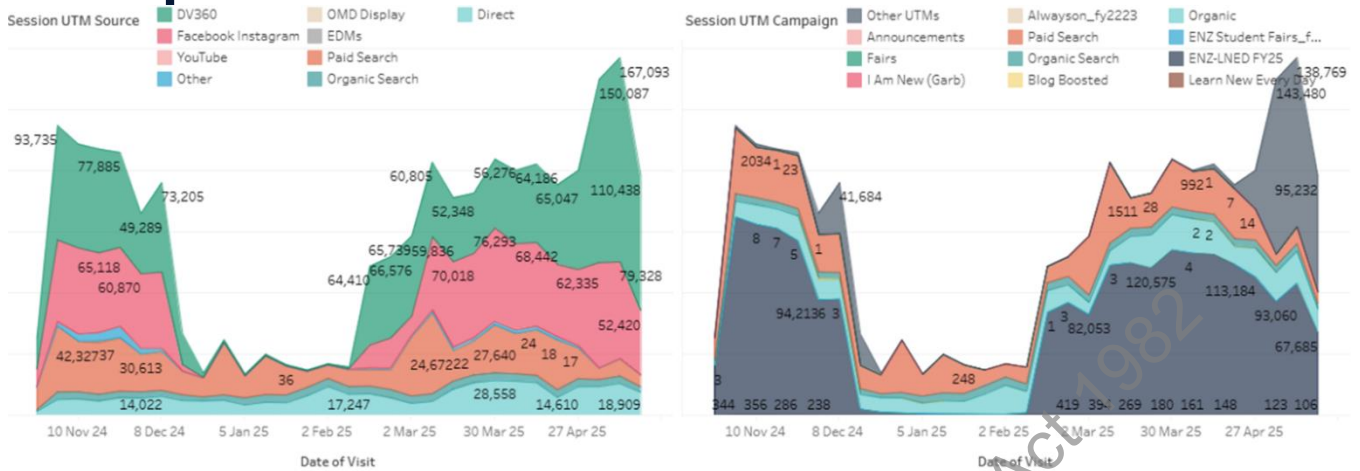
Student Experience: Understand the end-to-end student experience (from recruitment through post-study) to support improvements satisfaction, retention, and positive word-of-mouth.

Social Licence: Maintain public and stakeholder support by ensuring the education sector operates ethically, transparently, and in line with community expectations and values.

NZ Inc: Work collaboratively with NZ Inc to drive growth for international education.

Product Development (TNE etc): Develop new education products and delivery modes (such as transnational education programs) to diversify offerings and meet evolving global demand.

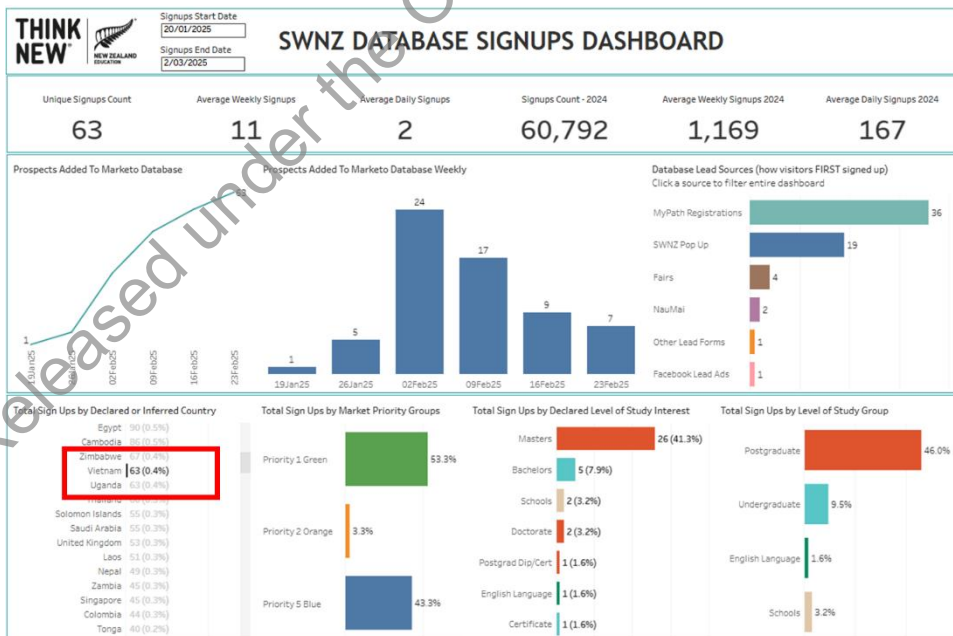
Appendix C: Performance evaluation example



ENZ regularly reviews, on a monthly and quarterly basis, our activity impact across markets to understand and refine our approach and to optimise our return on investment. Data allows us to be agile in our decision making to retarget areas where we're having greater impact and reduce low-performing spend.

One example is where our investment does not allow us to be always advertising in markets we can see an immediate impact in the engagement of our potential audience. In this case January 2025 saw a paid media freeze with only our social media support driving awareness and engagement.

Where we have activity in a market, particularly where there is a concerted NZ Inc approach, such as a Prime Ministerial mission into market, or a new campaign launch we can leverage the initial impact to drive preference and leads for education providers.



Appendix D: Market assessment examples

Three Market Assessments representing Core, Grow and Nurture investment classifications are included. A full suite of Market Assessments have been developed and inform our go to market activities. Further subsector activity planning will be undertaken to leverage the specific growth opportunities in those markets. These will be living documents, reviewed quarterly, and as and when significant market shifts occur to ensure we are maximising growth potential.

Released under the Official Information Act 1982

Monthly update excerpts

February 2025 monthly update

Contributions to the Government's Economic Growth Plan

ENZ has responded to requests from the cross-agency team working on the Government's Economic Growth Plan to demonstrate how international education will support New Zealand's growth. ENZ highlighted to the team that international education is a key plank of the plan and that there is room for further growth in international student numbers.

ENZ also provided the team with a case study on international education under the 'overseas investment and trade' pillar. The case study outlines the work to strengthen education connections with China through:

- The inaugural New Zealand – China High-level Education Forum that was held in Auckland in June 2024;
- The seven partnerships established under a Memorandum of Arrangement between Te Pūkenga/NZIST and China Centre for International People-to-People Exchange;
- The first cohort of Chinese students arriving to study at Lincoln University under the Joint Institute between Lincoln University and Huazhong Agricultural University; and
- New Zealand being named as the 2025 Country of Honour for the China Annual Conference and Expo for International Education.

April 2025 monthly update:

Market Assessment Summaries	<ul style="list-style-type: none">• 14 priority market assessment summaries have been shared with your office this week. An additional 4-5 market assessment summaries will be completed by the end of April and will be provided to you.• These summaries will inform International Education Growth Plan and will be reviewed regularly by ENZ to ensure New Zealand remains agile to respond to shifts in market conditions and updated intelligence and performance data.
------------------------------------	--

July 2025 monthly update:

Input to refresh of Going for Growth Plan	ENZ has provided a case study for inclusion in the report back on the Government's wider Going for Growth Plan that demonstrates international education sector's contribution in boosting export revenue. This was in response to a Ministerial request via New Zealand Trade and Enterprise. Please refer to Appendix I for the case study.
--	---

Released under the Official Information Act 1982

Appendix I - International education case study

The International Education Going for Growth Plan aims to position New Zealand as the destination of choice for international students and double international education's export revenue to \$7.2 billion by 2034. To achieve the goal, the Government is focused on accelerating the number and quality of international students coming to New Zealand. This can be achieved in a sustainable way while delivering a high-quality education to international students in New Zealand.

- Education New Zealand's Go-to-Market Plan is a central feature of the Going for Growth Plan. ENZ's promotional activity aims to bring New Zealand's distinctive brand and quality education experience to life by delivering a tailored marketing approach in each key market. ENZ will launch a global branding campaign to showcase New Zealand education's unique advantages and raise awareness in key international markets. This will commence with a tactical digital campaign "**We're Open. You're Welcome**", planned for Quarter One 2025/26.

Implementing ENZ's Go-to-Market Plan will raise awareness of New Zealand's unique offering from 38% in 2024 to 44% by 2034 and increase preference for a New Zealand education.

Going for growth in New Zealand's largest market for international students

S 9 (2)(j)

The June 2025 Prime Minister's visit to China witnessed the signing of ten agreements between New Zealand and Chinese educational institutions, with an estimated total value of over \$40 million for the New Zealand education providers involved. Additionally, the visit to Fudan University, one of China's most prestigious universities, and the launch of the New Zealand Country of Honour Promotional Campaign leading up to one of the largest international education events in China, significantly boosted awareness of New Zealand education. The Prime Minister Education-related coverage accounted for 84% of all media mentions related to the Prime Minister's visit to China⁴. This marks an 88% increase in media attention toward New Zealand education compared to the week prior, with notable growth in news coverage.

August 2025 monthly update:

Go to Market Plans - Grow and Core Markets

ENZ's Go to Market plans have been finalised this month with a focus on activities across the targeted Grow and Core markets, as defined in the International Education Going for Growth Plan. These plans integrate insights and in-market expertise and have been shared with targeted peak bodies through interactive webinars with key activity calendars extended out for 18 months to support the various subsector's own planning cycles.

Activities are already underway through brand marketing work and advance preparation is under completion for the Thailand Student Fair at the end of August and subsequent fairs in Japan, Viet Nam, and South Korea.

Next steps:

ENZ will share all the relevant Go to Market plans with all subsectors in the next week.

ENZ will also develop tailored market plans for its 'Maintain' markets. We will deliver promotional activities aimed at elevating awareness and drive preference of New Zealand as a premier study destination.

Quarter Four Report 2024/25 excerpt

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.

Out of scope



Released under the Official Information Act 1982