NEW ZEALAND EDUCATION
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Education New Zealand Briefing — Quarter One Report for 1 July to 30 September 2025

To:	Hon. Erica Stanford, Minister of Education		
Date:	21 October 2025	**Priority:**	Medium
Security level:	In confidence	**ENZ ID no:**	2526-076
Deadline date:	14 November 2025		
Drafter:	Stephanie Morison, Senior Advisor Accountability & Ministerials	**DDI:**	022 302 0104
Key contact:	Di Solomon, Director Government Relations & Communications	**DDI:**	021 342 080
Agencies who have seen this report:		Ministry of Education	

Purpose

This briefing provides Education New Zealand's (ENZ) Quarter One Report for the period 1 June to 30 September 2025 for your consideration. This is attached as Appendix One.

Alignment with Government priorities

This report aligns with Government priorities by demonstrating how ENZ's activities and investments over the first quarter of 2025/26 enable the New Zealand international education sector to double its export revenue and achieve your expectations.

Recommendations and Proactive Release

ENZ recommends that you

a. **note** that ENZ's performance for Quarter One for 1 June to 30 September 2025 is outlined in the report attached as Appendix One.

b. **note** ENZ's activities delivered in the first quarter strongly align with the International Education Going for Growth Plan and provide a strong foundation to achieve the enrolment growth and awareness building targets

c. **agree** that this briefing will be proactively published with any information needing to be withheld done so in line with the provisions of the Official Information Act 1982.

Agree / Disagree

Amanda Malu
Chief Executive
Education New Zealand
22/10/2025

Hon Erica Stanford
Minister of Education
__/__/____

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Context

ENZ's Quarter One Report provides an overview of the organisation's performance for the period 1 July to 30 September 2025. It outlines how ENZ's activities and investment support the Government's International Education Plan Going for Growth Plan.

This is the first report on ENZ's new strategic goals and priorities for the 2025/26 financial year. These goals and initiatives delivered this quarter to achieve these goals reflect ENZ's revised market categorisation model outlined in the International Education Going for Growth Plan.

The broad range of in-market campaign and in-person activities delivered in quarter one strongly align with the International Education Going for Growth Plan and provide a strong foundation to achieve the enrolment growth and awareness building targets.

ENZ's Board recently reviewed the report and approved it being provided to you.

Summary of Performance

ENZ has had a very strong start to the new financial year and is tracking positively against the new strategic goals and its measures. With the Go-to-Market plans for all Grow, Core and Maintain markets now finalised and shared with the sector and NZ Inc agencies, activities to grow awareness and drive enrolment growth are well underway.

The first of several in-market events successfully took place in Thailand this quarter with a 20% increase in participation from last year indicating that interest in New Zealand continues to remain high. In-market activities were supported by our online campaigns which saw a shift from the previously long-running campaign to the launch of ENZ's new creative platform 'New Zealand Taught Me' communicating New Zealand's unique educational offerings through the eyes of some New Zealand's exceptional alumni.

Further preparations for New Zealand's Country of Honour campaign for the China Annual Conference and Expo for International Education (CACIE) and China Education Expo (CEE) taking place later in October and supporting Minister Reti's travel have been a significant focus for ENZ. ENZ has been working in collaboration with a range of providers and Ministries of Education, Foreign Affairs and Trade, and Business Innovation and Employment to deliver a range of events at CACIE and CEE.

There are two non-financial measures which are being monitored to ensure that the targets are met by the end of the financial year:

1. ENZ's forecast based on January to April enrolments indicate the year-end enrolments are likely to fall between the medium and high-growth scenarios. The variance is minor and well within expected bounds and is not likely to materially affect progress toward the 2027 target;
2. The number of leads is currently tracking 1,053 behind the September YTD target. The main contributor to this was online lead numbers tracking behind target with 13,133 (2,457 below target). Several initiatives (planned and new) are underway to address this shortfall.

Financial update

Overall, ENZ is progressing to activation with the International Education Plan for Growth. Operational delivery across Grow markets remains on track at the end of quarter one, as ENZ heads into delivery of the fairs and agent activities in October.

As of 30 September 2025, ENZ reported a year-to-date surplus of $1.484 million. This is driven by ENZ's approach of phasing income versus expenditure to align with peak student recruitment season and in-market events. Reallocation is currently underway to boost lead generation from our marketing campaign and to ensure that we meet our target for the financial half year. We are confident that we will reduce this underspend by year-end.

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Appendix One: ENZ's Quarter One Report 1 July to 30 September 2025