NEW ZEALAND EDUCATION
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Education New Zealand Briefing

Quarter Two Report for 1 October to 31 December 2025

To:	Hon. Erica Stanford, Minister of Education		
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Agencies who have seen this report:		Ministry of Education	

Purpose

This briefing provides Education New Zealand's (ENZ) Quarter Two Report for the period 1 October to 31 December 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 second 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 Two for 1 October to 31 December 2025 is outlined in the report attached as Appendix One.

b. **note** ENZ's activities delivered in the second 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.

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c. **note** 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.

Linda Sissons	**Hon Erica Stanford**
Acting Chief Executive	Minister of Education
Education New Zealand	_/_/2026
17/03/2026	

Context

ENZ's Quarter Two Report provides an overview of the organisation's performance for the period 1 October to 31 December 2025. It outlines how ENZ's activities and investment support the Government's International Education Plan Going for Growth Plan.

This report brings us to the halfway mark of the 2025/26 financial year and at the halfway point in meeting ENZ's new strategic goals and priorities. This quarter represents a very active period in the student recruitment cycle with a broad range of in-market campaigns and in-person activities delivered to achieve the goals set out in the International Education Going for Growth Plan.

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

Summary of Performance

Overall, organisational performance remained strong in Quarter Two of this 2025/26 financial year, with ENZ continuing the momentum from Quarter One and delivering solid results across its strategic goals. Specific highlights include:

- The Country of Honour campaign at CACIE and the China Education Expo generated significant visibility, with multiple agreements signed and extensive media coverage.
- ENZ's global recruitment activities, including events across Thailand, Viet Nam, Japan, and South Korea, attracted strong attendance and positive provider feedback, contributing to increased awareness and preference for New Zealand as a study destination.
- Enrolment data released during the quarter showed a 14% year-on-year increase, while public support for international education remained high at 77%.

Performance measures largely tracked well against annual targets, with key indicators in marketing and student recruitment showing positive progress. Operational delivery capability and programme management also advanced meaningfully during the quarter. Other highlights include:

- ENZ successfully implemented Phase One of the new Manaaki Scholarship management system, completing user testing, provider training, and migration of scholar data.
- Sector-facing outputs remained strong, with insights products such as the 2025 Student Experience Survey and 2025 New Zealand Public Perceptions Survey, agent engagement rollout, and support materials (such as the student visa preparation video) gaining substantial uptake.
- Preparation for upcoming brand research, ongoing delivery of the Go-to-Market plan activities, and international events indicates strong forward momentum heading into Quarter Three.

Most measures are tracking towards their YTD target with the following three measures being monitored:

1. **Increase in international student enrolments.** While enrolments have grown strongly (as at August 2025, international enrolments reached 83,535, a 14%

increase on the same period in 2024), numbers are tracking slightly behind target and forecasting to reach around 96% of the 2025 target.

2. **Maintain a ratio of no less than 40% of ENZ staff based offshore in key markets.** This ratio currently sits at 36%. Planned recruitment activity across the next two quarters means that ENZ expects to be on track to achieve this result by the end of the financial year.

3. **ENZ staff understand how their work contributes to the goals of ENZ:** The November Pulse Survey result has this measure sitting at 80%. This shows no significant change from May 2025 and is behind the year-end target of 85%. It is expected that the May 2026 survey will move this closer to the year-end target.

Financial update

As of 31 December 2025, ENZ reported a year-to-date surplus of $1.786 million. A forecast through to 30 June 2026 has been completed and strategic reallocation decisions made to prioritise Go-to-Market deliverables. This includes lifting the investment in media presence through the second half of the financial year, piloting international education platform partnerships, and marketing AI technology. We are currently sourcing specialist staff for key projects, which may see some carry forward funding from this financial year into 2026/27 financial year.

Appendix One: ENZ's Quarter Two Report 1 October to 31 December 2025