



Education New Zealand Briefing

<b>Title:</b>	Trends in the number of international students enrolled with New Zealand providers		
<b>Date:</b>	6 June 2018	<b>Priority:</b>	Medium
<b>Security level:</b>	Unclassified	<b>ENZ ID no:</b>	1718-146

03 JUN 2018  
BY OFFICER Han Hippen

Action sought

Addressee:	Action sought:	Deadline:
	<b>Note</b> that Education New Zealand will release the 2017 international student enrolment information on 20 June 2018.	
Minister of Education	<b>Forward</b> this briefing to the Minister of Immigration for his information.  <b>Agree</b> that this briefing is proactively released as part of the July 2018 release.	20 June 2018

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 <sup>st</sup> contact
John Goulter	General Manager Stakeholders and Communications	[REDACTED]	[REDACTED]	withheld under s9(2)(a)
Andy McPhee	Intelligence Manager	[REDACTED]	[REDACTED]	X withheld under s9(2)(a)

The following departments/agencies have seen this report

<input type="checkbox"/> ERO	<input type="checkbox"/> MBIE	<input type="checkbox"/> MFaT	<input type="checkbox"/> MoE	<input type="checkbox"/> MoH	<input type="checkbox"/> MSD
<input type="checkbox"/> NZQA	<input type="checkbox"/> NZTE	<input type="checkbox"/> TEC	<input type="checkbox"/> TPK	<input type="checkbox"/> Treasury	<input type="checkbox"/>

Minister's office to complete

<input type="checkbox"/> Approved	<input type="checkbox"/> Declined	<input type="checkbox"/> Noted	<input type="checkbox"/> Needs change
<input type="checkbox"/> Seen	<input type="checkbox"/> Overtaken by events	<input type="checkbox"/> See Minister's notes	<input type="checkbox"/> Withdrawn

**Comments:**

Proactively released

## Education New Zealand Briefing

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### Recommendations

Education New Zealand recommends that you

- a. **note** that Education New Zealand will release the 2017 international student enrolment information on 20 June 2018

Noted

- b. **forward** this briefing to the Minister of Immigration for his information

Agree  Disagree

- c. **agree** that this briefing is proactively released as part of the July 2018 release

Agree  Disagree



John Goulter  
Acting Chief Executive  
Education New Zealand



Hon Chris Hipkins  
Minister of Education

2016/18



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## Purpose

1. This paper summarises the number of international students enrolled with New Zealand providers in 2017. Education New Zealand (ENZ) will publish this information in [IntelliLab](#) (ENZ's portal for the international education sector and government agencies) and will inform the sector via its E-News newsletter on 20 June 2018.

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## Background

2. International student enrolment numbers, and the subsectors in which they study, are often used to assess the state of the international education industry. International student enrolment numbers are also important for industry planning and for government policy makers. As the lead government agency for international education, ENZ reports student visa and international student enrolment numbers to industry and government.
3. ENZ defines an international student as a non-resident who has expressly entered New Zealand with the intention of studying or has enrolled with a New Zealander provider offshore. Included in this definition are international PhD students, exchange students, NZ Aid students, foreign research postgraduate students and full fee-paying international students. Those not counted as international students include Australian citizens and residents, people identified as being in New Zealand on a work visa, dependents or partners of migrants working in New Zealand and dependents of foreign diplomats or military personnel.

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## International student enrolment numbers

4. International student enrolment numbers are provided to ENZ by the Ministry of Education (MoE). The numbers are obtained from two sources:
  - the single data return (SDR), completed each trimester by all institutions that receive government student funding<sup>1</sup>
  - a manual system to capture the balance of international students from unfunded English language schools (ELS) and private training establishment (PTE) providers.
5. Sometimes providers submit their data late to the MoE, and the MoE needs to extract and cleanse the submitted data from a number of systems. Combined, these factors can delay the international student enrolment numbers being provided to ENZ.
6. Counting the total number of international students enrolled with New Zealand providers (both onshore and offshore) is different from counting the total number of international student enrolments because an international student can enrol in more than one course in the same year. For example, an international student may enrol in a short-term English language course before starting a university course. ENZ counts the number of international students rather than the number of enrolments, to align with the economic valuation of the sector.

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<sup>1</sup> These institutions include primary schools, intermediate schools, secondary schools, institutes of technology and polytechnics, universities, some English language schools and some private training establishments.

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## Number of international students enrolled with New Zealand providers in 2017

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7. A summary of the number of international students for the 2017 calendar year is attached. This information has not yet been released by ENZ and will be made publicly available on 20 June 2018.
8. There were 125,392 international students enrolled with New Zealand providers in 2017, a 5% decrease compared to 2016. Using the previous biennial economic valuation methodology and living costs<sup>2</sup>, ENZ estimated that the 2017 economic value of the sector remained at a level similar to the published 2016 economic value of \$4.5 billion, despite the decrease in the number of international students. ENZ is currently undertaking an economic valuation analysis to calculate the actual economic value of international students to New Zealand for 2017.
9. In 2017, international students paid \$1.1 billion in tuition fees. The increase in the number of postgraduate international students drove the 2% increase in tuition fees paid by international students to New Zealand providers, despite the overall decrease in international student numbers.
10. The overall decrease in the number of international students was driven by a 22% decrease in the private training establishment (PTE) subsector, which was partly offset by increases in the university (up 7%) and secondary school (up 6%) subsectors. Both the English language and institutes of technology and polytechnics subsectors were flat with a 1% decrease in 2017, while primary and intermediate schools recorded increases of 29% and 14% respectively.
11. The decrease in the PTE subsector occurred in both funded and unfunded PTEs and was due to a 28% decrease in students from India. This drove the 9% decrease in international students in Auckland, while growth in the university and secondary school subsectors supported the increased number of international students in most other regions. The only other regions that saw decreases in international student numbers were Taranaki, the Bay of Plenty and the West Coast.
12. The growth in the university subsector saw a 5% increase in the number of international students studying at postgraduate level. Since 2013, the number of postgraduate international students has grown consistently with 61% more postgraduate international students in 2017 than in 2013.

### Next steps

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13. On 20 June 2018, ENZ will release the number of international students for the 2017 calendar year. ENZ will do this by:
  - publishing a story in E-News, ENZ's newsletter to the New Zealand international education sector
  - publishing the attached summary on IntelliLab which will be publicly available

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<sup>2</sup> When ENZ undertakes a biennial economic valuation, international students are surveyed to find out how much they spend while studying in New Zealand. In alternate years, ENZ reports an estimated international education sector value based on the most recent economic valuation and the current number of international students.



- publishing more detailed data tables for use by the New Zealand international education sector and New Zealand government agencies only on IntelliLab.

14. ENZ is currently undertaking two biennial economic valuations of the sector – one for the value of international students in New Zealand and another for the value of New Zealand education products and services delivered offshore. ENZ will provide you with the results of the valuations in August 2018.

#### **Proactive release**

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15. ENZ intends to proactively release this briefing as per your expectation that information be released as soon as possible. Any information which may need to be withheld will be done so in line with the provisions of the Official Information Act 1982.

Proactively released

# 2017 International Students Summary


**125,392**  
Total students in 2017



 Fees are up 2%\* (extra \$18 million)

 Positive rebalance towards high-level qualifications

 Consistent growth in the universities sector

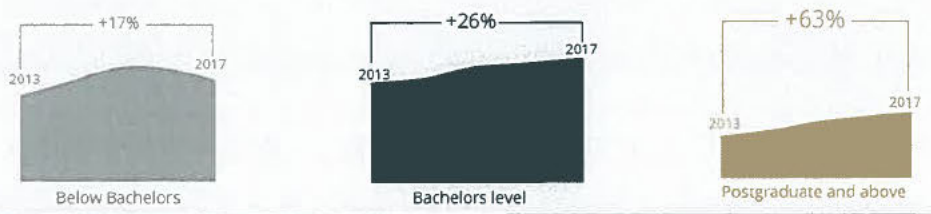
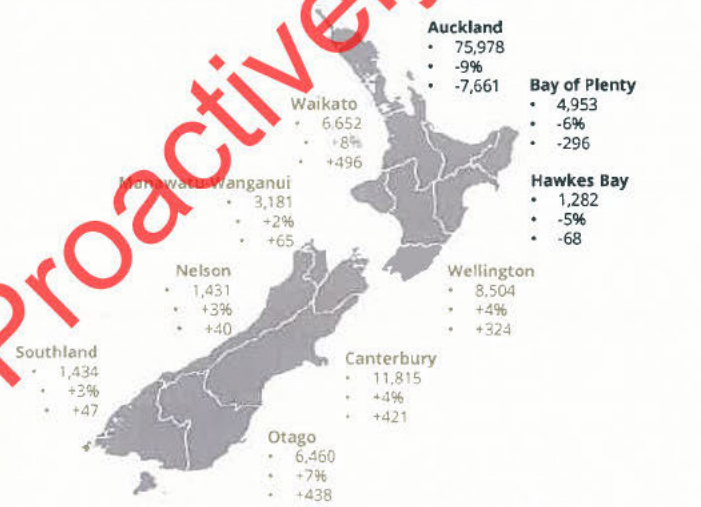
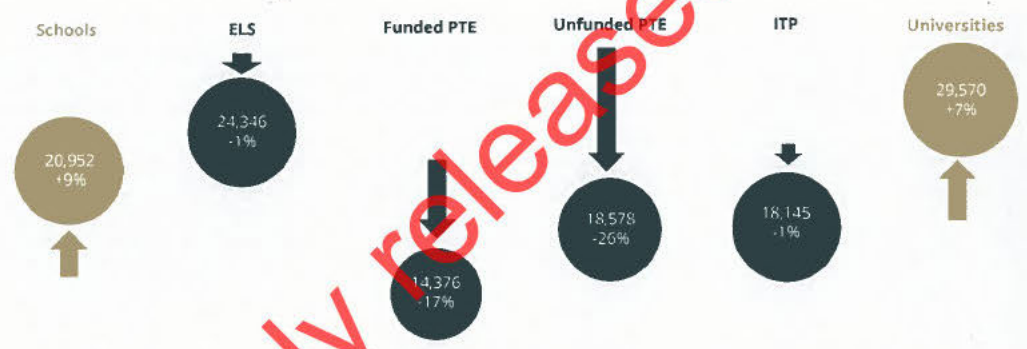
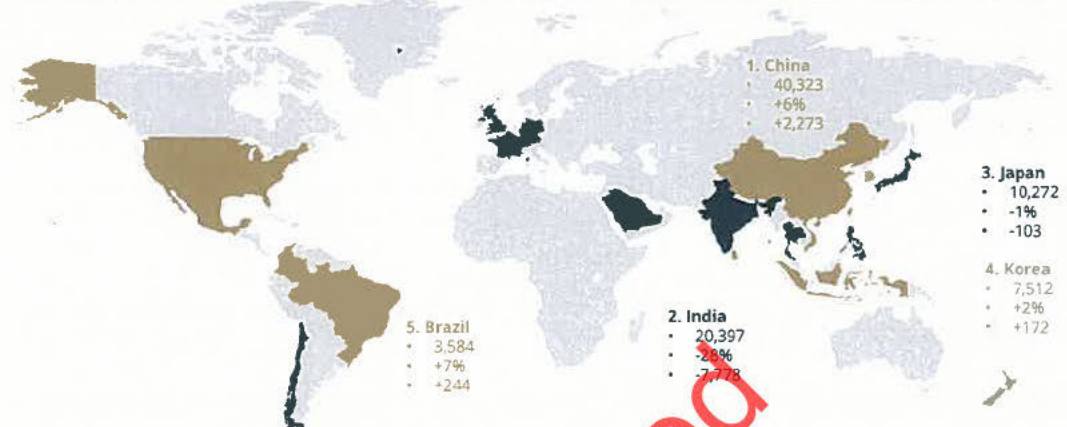
 More students studying at postgraduate and above level\*

 Growth across most of regional New Zealand

 Significant drop in students studying in Auckland

**-28%** Significant decline in the India market\*

 Significant decline in the PTE sector\*



This data is for the full year of 2017. \* Increases and decreases for this year are comparing the same period in 2016. All trends are for the period 2013-2017. This summary combines the data sources from the Ministry of Education; the Export Education Levy and Single Data Return (SDR) data. Offshore students are included if classified as offshore in the SDR. Link to data source: student numbers (www.educationcounts.gov.nz). The numbers of students by region and by qualification level will not add up to the total number because students study in multiple regions for multiple qualifications. Levels and Broad Field data pertinent to SDR only. Further revisions may occur.