



## Education New Zealand Briefing

**Title:** International Student Enrolments, August 2023  
**Date:** 15 February 2024 **Priority:** Medium  
**Security level:** Unclassified **ENZ ID no:** 2324-081

### Action sought

Addressee	Action sought	Deadline
Minister of Education	<p><b>Note</b> that in January to August 2023 there were 59,306 international students enrolled with New Zealand education providers, a 43% increase compared to the full year 2022.</p> <p><b>Note</b> that this data will be referenced in media material and speeches.</p>	
Minister for Tertiary Education and Skills	<p><b>Note</b> that this is one of the first publicly released enrolment data updates and as such gives an insight into the recovery of the international education sector following the opening of New Zealand's borders in August 2022</p> <p><b>Agree</b> to issue a media statement releasing these international student enrolment numbers,  <b>or</b>  <b>Agree</b> that ENZ can issue a media statement releasing these international student enrolment numbers.</p> <p><b>Agree</b> that this briefing will be proactively released with any information needing to be withheld done so in line with the provisions of the Official Information Act 1982.</p>	

### Contact for telephone discussion (if required)

Name	Position	Telephone	Cellphone	1 <sup>st</sup> contact
Marie Clark	Director Insights		021 793 046	√
Dr Linda Sissons	Acting Chief Executive			

### The following departments/agencies have seen this report

MoE     NZQA     MBIE     MFaT     TEC     Other:

### Comments



## Education New Zealand Briefing

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### Executive Summary

Education New Zealand (ENZ) receives updates on the number of international students three times a year from the Ministry of Education (MoE). The most recent update in December 2023 gives a picture of all students enrolled in January to August/Terms One and Two 2023. This is one of the first enrolment data updates and as such gives an insight into the recovery of the international education sector following the opening of New Zealand’s borders in August 2022.

In January to August/Terms One and Two 2023, there were 59,306 international students enrolled with New Zealand education providers, a 43% increase on the total (full year) students enrolled in 2022. International student enrolments have grown in 2023 in all subsectors (excluding wānanga), although some have experienced a faster recovery. MoE will provide ENZ with the final numbers for 2023 in March 2024.

Over 59,000 enrolments, in just eight months, confirms that international students continue to find New Zealand an attractive education destination. And for the university sectors with 27,535 students enrolled, where a proportion of learners may study for a number of years, there is a solid base of students from which to grow.

For the purposes of this paper, ENZ considers an international student as a non-resident who comes to New Zealand expressly for the purpose of study or has enrolled with a New Zealand education provider offshore. This includes students who are treated as a domestic student under the Education and Training Act 2020, for example exchange and PhD students.

### Recommendations

Education New Zealand recommends that you:

- a. **note** that in January to August 2023 there were 59,306 international students enrolled with New Zealand education providers, a 43% increase compared to the full year 2022
- b. **note** that this data will be referenced in media material and speeches

Noted

Noted

c. **note** that this is one of the first publicly released enrolment data updates and as such gives an insight into the recovery of the international education sector following the opening of New Zealand's borders in August 2022

Noted

d. **agree** for the Minister of Education **OR** Minister for Tertiary Education and Skills to publicly announce these international student numbers

Agree / Disagree

or

**agree** for the Chief Executive of Education New Zealand to issue the attached media statement to publicly announce these international student numbers

Agree / Disagree

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

Agree / Disagree

*Linda Sissons*

Linda Sissons  
Acting Chief Executive  
Education New Zealand  
15 / 02 / 2024

Hon Erica Stanford  
Minister of Education  
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*Penny Simmonds*  
Hon Penny Simmonds  
Minister for Tertiary  
Education and Skills  
17.2.24

## Purpose

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1. This paper provides a summary of the number of international students enrolled with New Zealand providers in January to August 2023 with comparisons for the full year 2022. Education New Zealand (ENZ) will work with your office to organise the release of the international student enrolment numbers.

## Background

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2. The number of international students enrolled with New Zealand providers, and the subsectors in which they study, are used to assess the state of the international education sector. Comparing the January to August 2023 numbers with 2022 shows how the sector is recovering from a prolonged period of border closures.
3. Historically, the Ministry of Education (MoE) has reported on Export Education Levy data which reports on the number of full-fee paying international students and foreign research-based postgraduate students who come to New Zealand for study. Full-fee paying international students are those students who are not treated as domestic students under the Education and Training Act 2020. Other non-New Zealand citizens and residents come to New Zealand for the purpose of study but are defined as domestic students under the Act, such as international PhD students.
4. In response to significant financial hardship being faced by the international education sector due to COVID-19, the obligation for providers to pay the Export Education Levy was suspended in 2020 and 2021, and further revoked in 2022. The levy was reintroduced from 1 January 2023.
5. For the purposes of this paper, ENZ has used the number of students who are non-resident who have expressly entered New Zealand with the intention of studying here (including full-fee paying international students, international PhD students, exchange students, NZ Aid students, foreign research-based postgraduate students) or have enrolled with a New Zealand provider offshore. These numbers are important for sector planning, and for informing the services ENZ provides the sector. ENZ reports international student enrolment numbers to the international education sector and government via [IntelliLab](#)<sup>1</sup>.

Those students not included in these numbers include Australian citizens and residents, work visa holders, dependents or partners of migrants working in New Zealand and dependents of foreign diplomats or military personnel.

## Source of the number of international students

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6. MoE provides consolidated data on international students who have enrolled with New Zealand providers to ENZ through the following three data sources:
  - school enrolment data from primary (years 1-6), intermediate (years 7-8) and secondary schools (years 9-13)

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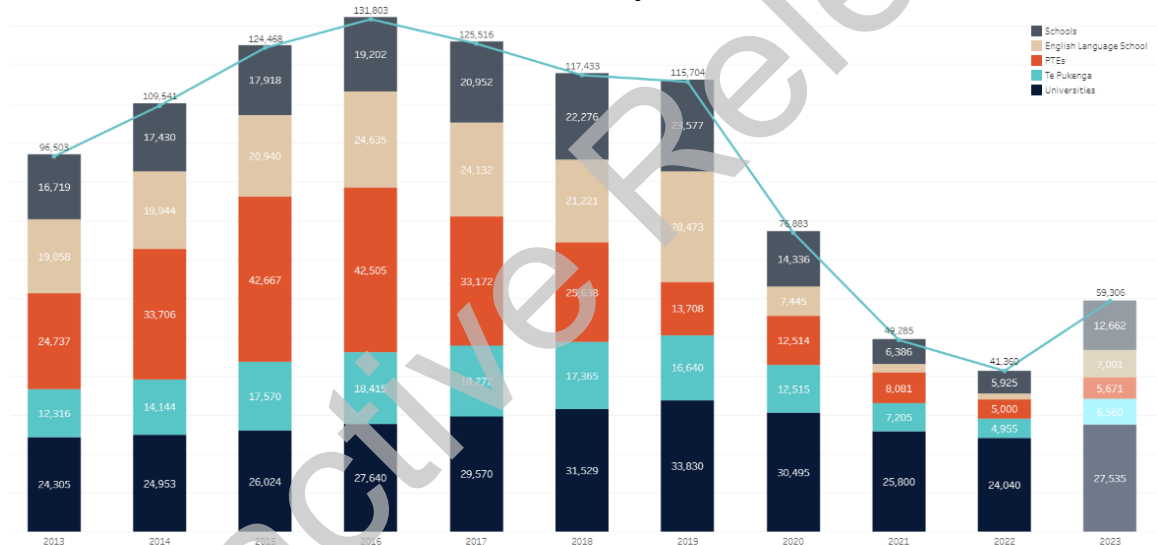
<sup>1</sup> IntelliLab is ENZ's intelligence portal that provides information and marketing intelligence to New Zealand's international education sector and government agencies.

- the single data return, completed each trimester by all tertiary institutions that receive government student funding<sup>2</sup>
- the unfunded international providers system (known as UIP) which captures international students who enrolled with unfunded English language schools and unfunded private training establishments.

This is provided to ENZ three times in a year. There are two “in year” updates (April/Term One and August/Term Two) and one final update (for the prior year) in March. All these updates can be subject to restatement (changed at a later date).

### International students enrolled with New Zealand providers

7. In January to August 2023, 59,306 international students were enrolled to study in New Zealand, a 43% increase from 41,360 in the full year 2022.<sup>3</sup>



### Longer term trends

8. International student enrolments at universities and schools have increased year on year since 2013. Enrolments at Te Pūkenga increased during the 2013 to 2017 period from 12,316 to 18,272. However, from 2018 to 2020 international student enrolment numbers declined to 16,640 in 2019. A similar trend was also seen with the private training establishments (both funded and unfunded) and English language sectors.
9. Prior to the border closure in 2020, there were encouraging signs suggesting that policy and regulatory settings changes, in addition to ENZ’s promotional activities being focused on a quality education and student experience, were delivering the shifts expected by the NZIES 2018-2030. The sector had started moving from a focus on volume to value with lower numbers of international student enrolments and a greater

<sup>2</sup> These institutions include institutes of technology and polytechnics (ITPs), universities, wananga, and some private training establishments (funded PTEs).

<sup>3</sup> There are 253 more international students enrolled in January to August 2023 compared to ENZ’s Briefing to the Incoming Minister (BIM) which reported 59,053 international student enrolments. The different is the result of updated data being provided to ENZ after the BIM was finalised.

proportion of international tertiary students studying at higher levels of study and in areas likely to support New Zealand's skill needs.

### Comparing 2023 to 2022:

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10. English language schools have seen the greatest percentage increase in international enrolments, increasing by 347% from 1,565 to 7,001. In respect of other subsectors:
- Schools: 114% increase from 5,925 to 12,662
  - Te Pūkenga: 32% increase from 4,955 to 6,560
  - Universities: 15% increase from 24,040 to 27,535
  - Private training establishments (funded and unfunded): 13% increase from 5,000 to 5,671.<sup>4</sup>

In August 2023, universities with 27,535 and schools with 12,662, remained New Zealand's two largest subsectors for international student enrolments.

11. China remains New Zealand's number one student source country with 36% of enrolments, followed by India (10%), Japan (10%), South Korea (5%), Thailand (4%), United States of America (4%), Germany (3%), Viet Nam (2%), Philippines (2%), and Brazil (1%). Like most of New Zealand's competitors, China is the world's largest source market for international students.
12. As in previous reports there is significant variance of source country by subsector:
- Schools: China (29%), Japan (23%), South Korea (12%), Germany (10%), and Thailand (7%)
  - Te Pūkenga: India (36%), China (27%), Philippines (7%), Sri Lanka (6%) and Nepal (3%)
  - Universities: China (50%), India (8%), United States of America (7%), Viet Nam (4%) and Malaysia (3%)
  - English language schools: Japan (30%), Thailand (12%), China (10%), Brazil (8%) and South Korea (7%)
  - Private training establishments: India (27%), China (26%), Philippines (13%), Japan (5%) and Nepal (4%).

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<sup>4</sup> In August 2023 there were five international students enrolled with wānanga. This is a 50% reduction from the 10 enrolled in 2022.

## Next steps

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13. ENZ will reference this data in media material and speeches.
14. A draft media statement is attached for your approval. ENZ will work with your office to organise the release of the international student enrolment data and for it to be published in IntelliLab. This data will be the first publicly released to reflect the recovery from COVID-19 on the international education sector. ENZ expects the release of this data to result in questions on the progress of recovery.

Proactive Release

## Media release (draft)

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### International student enrolments top 59,000 for the first eight months of 2023

The Minister of Education, Erica Stanford, today released international student enrolment data for the first eight months of 2023. From January to August 2023 there were 59,306 international student enrolments\* with New Zealand education providers, a 43% increase compared to the full year in 2022.

Minister Stanford said, “Over 59,000 enrolments, in just eight months, confirms that international students continue to find New Zealand an attractive education destination. And for the university sector with 27,535 students enrolled, where a proportion of learners may study for a number of years, there is a solid base of students from which to grow.”

International student enrolments have grown in all subsectors except wānanga. Comparing 2023 to 2022, English Language Schools have seen the greatest percentage increase in international enrolments, increasing by 347% from 1,565 to 7,001. Schools reported a 114% increase from 5,925 to 12,662. Te Pūkenga, a 32% increase from 4,955 to 6,560. Universities, a 15% increase from 24,040 to 27,535 and Private Training Establishments (funded and unfunded), a 13% increase from 5,000 to 5,671.

Universities and schools remained New Zealand’s two largest subsectors for international students.

As with all New Zealand’s competitors, China is the largest source market for international students. In the reporting period, China was 36% of enrolments, with India (10%), Japan (10%), South Korea (5%), and Thailand (4%) in the top five.

Minister Stanford said, “It is a Government priority to diversify our recruitment efforts for international students with the aim of reaching a broader spectrum of countries.”

Final enrolment numbers for 2023 will be available in March 2024.

ENDS

\* One individual may enrol more than once