

THE NEW ZEALAND INTERNATIONAL EDUCATION SECTOR

TRENDS FROM 1999 TO 2004

International Division & Data Management and Analysis

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Introduction

This report sets out the available information on the key trends in enrolments of foreign fee-paying students (FFPS) within the New Zealand education sectors, including primary and secondary schools, public tertiary education institutions (i.e. universities, polytechnics/institutes of technology, colleges of education) and private training establishments (including English language schools).

From 1999 to 2003, New Zealand's previously small international education sector, that is, in terms of enrolments of foreign fee-paying students, experienced rapid growth. Enrolment numbers rose by 318 percent over the five year period to nearly 119,000, with an estimated economic value of \$2.2 billion. The sector has had a commensurately increasing impact on the wider education system, greater importance to the national economy and higher visibility in society.

However, in the 2003 – 2004 period there was a decline in student inflows from countries in north Asia, with the main impact affecting enrolments in schools and English language training providers.

The rapid development of the international education sector has raised a number of issues for the New Zealand government and the lead industry bodies. Among these are the need for enhanced quality assurance systems, implemented through the *Code of Practice for the Pastoral Care of Foreign Fee-Paying Students* (operated by the Ministry of Education), and the processes of the New Zealand Qualifications Authority (NZQA).

A need for greater investment in cross-sector promotion in international source countries has become apparent, and there has been increased interest in professional development among providers and in research into education activities and effectiveness. Extensive cooperation between the government and the lead industry bodies has resulted in the development of a number of initiatives.

Export Education Development Programme

A wide range of development and risk management activities for the export education industry, including international promotions, research, professional development and quality assurance, are funded through the Export Education Levy. The levy is authorised according to section 238 of the Education Act 1989. Regulations prescribing the levy first came into force on 10 January 2003. The levy consists of a flat fee component of \$185 payable by each provider, together with 0.45 percent of tuition fee income from international students.

International Education Budget Package

The 2004 Budget stated a significant commitment to supporting international education with a new investment of \$40 million over the next four years, designed to lift New Zealand's profile overseas and further strengthen the sector through a comprehensive programme of new activity. The Budget package provided funding to support a range of activities across five broad areas. The new initiatives include:

- **Education diplomacy** - offshore education counsellor positions will be established to work in key markets overseas;

- **Strengthening quality** - in conjunction with the sector, the focus will go on identifying the best ways to improve achievement of international students. This will include the development of good practice examples and quality assurance indicators; and extending the scope of New Zealand quality assurance systems to cover off-shore programmes by New Zealand providers. It will be linked to our domestic focus on strategies for effectively teaching students from diverse backgrounds;
- **Scholarships** - to attract top international post-graduate and undergraduate students to study and carry out research in New Zealand. From 2005 about 33 scholarships will be available annually for international students at doctoral (PhD) level and there will be 33 scholarships at the undergraduate level. By 2007 there will be 200 of these scholarships available;
- **Study Abroad awards** - to increase opportunities for talented New Zealand students, teachers and researchers to undertake overseas study. By 2007 there will be at least 100 awards each year at secondary and 100 at tertiary level. The first 33 tertiary awards will be available in 2005, while the secondary awards will be introduced progressively from the beginning of 2006;
- **The Export Education Innovation Programme** - funding will help New Zealand providers to research risk factors, build capability, access seed funding for new products and partnerships, and undertake feasibility studies on options like satellite campuses, e-learning, and off shore courses; and
- **Generic promotion and marketing** - to support the promotion of New Zealand education internationally, with improved co-ordination of marketing efforts and promotion of an effective national brand in a wider range of markets.

On 19 April 2005 the government announced extra spending of \$21 million on international education over the next four years, to further boost the industry in New Zealand and strengthen bi-lateral links offshore. This brings the government's investment in international education to over \$70 million across the five years from June 2004 to 30 June 2009.

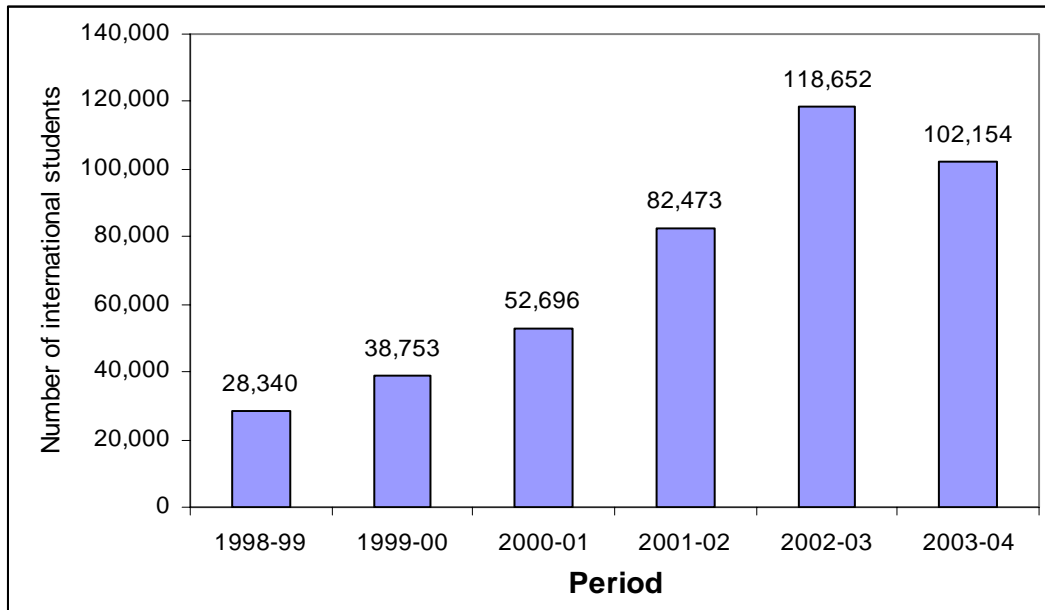
- The new funding lowers the cost of Doctor of Philosophy (PhD) study to domestic fee levels for new international students enrolled in New Zealand universities, from the beginning of 2006.
- It also allows the children of all international PhD students to attend school without paying international student fees.
- The new funding also speeds up the establishment of the off-shore education counsellor network with three new education counsellors. It allows for expansion of the network from four to at least seven countries or regions by the end of 2006.

Foreign Fee-Paying Students in New Zealand

The trend in total student numbers

From 1999 to 2003 there was rapid growth in international student numbers, and provider involvement in education activities. Over this period, there was a 409 percent increase in international student enrolments, from 28,340 to 118,652. This trend came to an end in the year to July 2004, with a 16.5 percent decrease in international student numbers. This is shown in Figure 1 below.

Figure 1: Foreign Fee-Paying Students in New Zealand, July 1999 – July 2004



Distribution of Foreign Fee-Paying Students by sector

The numbers of Foreign Fee-Paying Students (FFPS) enrolled with New Zealand providers in the year to July 2004 are stated in Table 1. Due to differences in data collection systems, the numbers of FFPS enrolled at English Language Schools (ELS) are relatively over-stated¹.

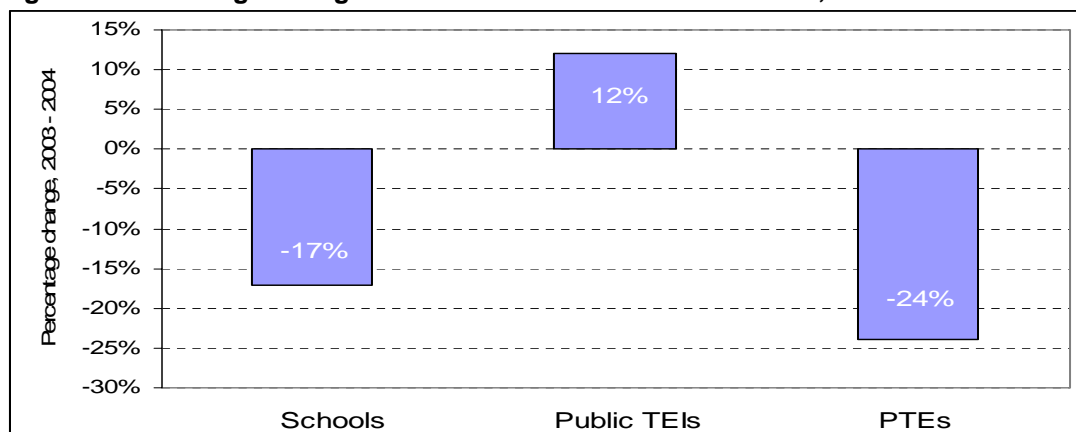
Table 1: Foreign Fee-Paying Students in New Zealand, 2003 – 2004

Schools	Primary	3,910
	Secondary	10,567
Public Tertiary Education Institutions	Universities	21,116
	Polytechnics	7,526
	Colleges of Education	409
	Wananga	0
Private Tertiary	Private Training Establishments	8,032
	English Language Schools	50,594
Total		102,154

¹ The numbers of Foreign Fee-Paying Students enrolled at ELS are *cumulative*, and are taken from the annual Statistics New Zealand Survey of English Language Providers for the year ended March 2004. All other figures are a *snapshot* of student numbers, based on Ministry of Education statistical returns for 1 July 2004. One significant difficulty in simply comparing these numbers is that they cover quite different time periods.

As can be seen in Figure 2, the largest decline from 2003 to 2004 in FFPS was reported by private training establishments (PTEs), including English Language Schools. The number of FFPS in PTEs decreased by 24 percent over this period. Schools also reported a decline in international student numbers, for the first time since 1999, with a drop of 17 percent from 2003 to 2004.

Figure 2: Percentage change in international student enrolments, 2003 – 2004



Foreign Fee-Paying Students by region and economy of origin

Table 2 below shows that the vast majority of FFPS studying in New Zealand in 2004 were of Asian origin. European students were the next largest regional grouping.

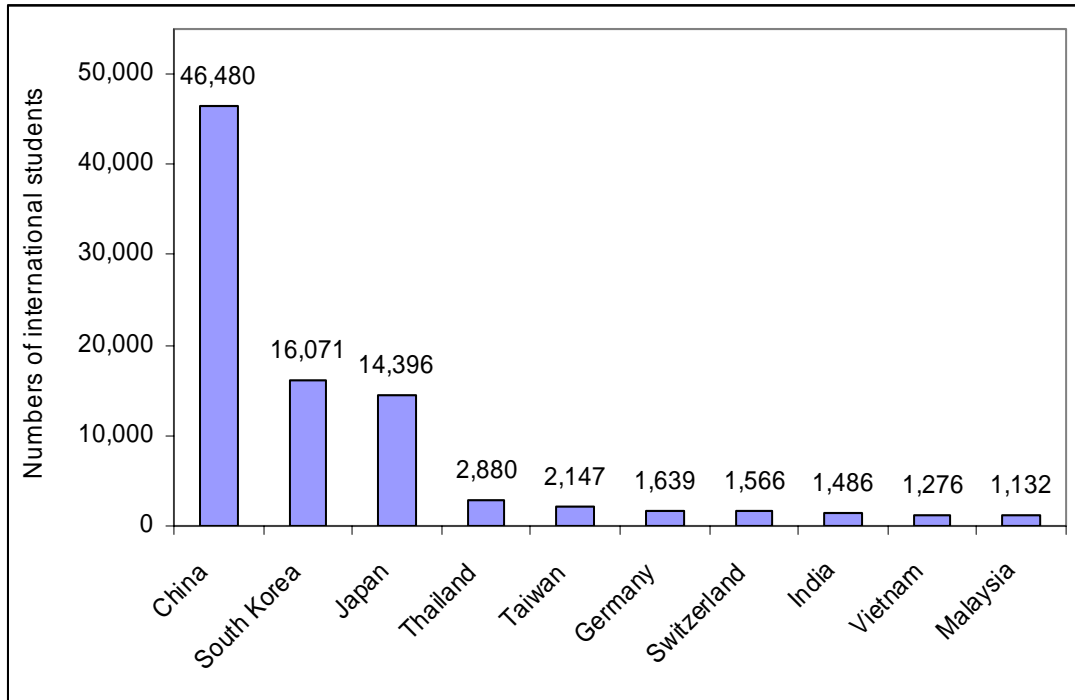
Table 2: Region of origin of FFP Students, 2003 – 2004

Regions	Percentage
Pacific	1.6
Asia	86.5
North America	1.2
South America	1.0
Africa	0.3
Europe	5.3
Middle East	0.5
Unknown / Not Stated	3.5
Total	100.0

Of the top ten source economies in 2004, eight were in Asia (see Figure 3). Students from China were the largest group enrolled at all providers, with the exception of primary schools. Overall, China accounted for 45 percent of FFPS in New Zealand.

South Korea accounted for the second largest number of FFPS, with 16 percent, followed by Japan with 14 percent. These three nations, therefore, accounted for three-quarters of all international enrolments. The top ten source economies accounted for almost 90 percent of all FFPS.

Figure 3: Top Ten Source Economies in 2004



The Economic Impact of Foreign Fee-Paying Students

Table 3 presents a summary of the economic contribution of the international education sector, which was estimated to amount to NZ\$2.19 billion in 2004.

Table 3: Foreign Fee-Paying Students and economic impact, by sector²

International student enrolments \$NZ x 1000	2002 – 2003	2003 – 2004
Schools	17,448 \$446,285	14,477 \$389,605
Universities	18,532 \$742,391	21,103 \$865,666
Polytechnics/Institutes of Technology	7,219 \$241,670	7,521 \$257,819
Colleges of Education	297 \$9,839	409 \$13,875
Private Tertiary Establishments	7,152 \$227,190	8,032 \$255,144
English Language Schools	69,494 \$544,277	50,594 \$405,713
Totals	120,142 \$2,211,652	102,136 \$2,187,822

Source: Education New Zealand Trust (www.educationnz.org.nz)

Note: The total stated for 2002-2003 differs from that in Figure 1 due to the use of provisional data in the economic calculation.

A key finding to note is that the economic contribution of international education did not fall significantly in 2004, despite the decline in the number of students from the peak of 2003. This is because of the increase in international student enrolments in the eight universities, as students enrolled in these institutions generally pay higher fees, and spend more on living costs, for their multi-year courses. By comparison, students enrolled with English language providers usually study for a maximum of six months.

Information from the Export Education Levy collected by the Ministry of Education indicates the tuition fee income received by the different sectors from FFPS. The relevant data for the 2003 and 2004 calendar years is shown in Table 4. This shows that, while school fees revenues declined by 7.3 percent and that of private providers by 15.7 percent, the overall income of public tertiary education institutions rose by 20.7 percent.

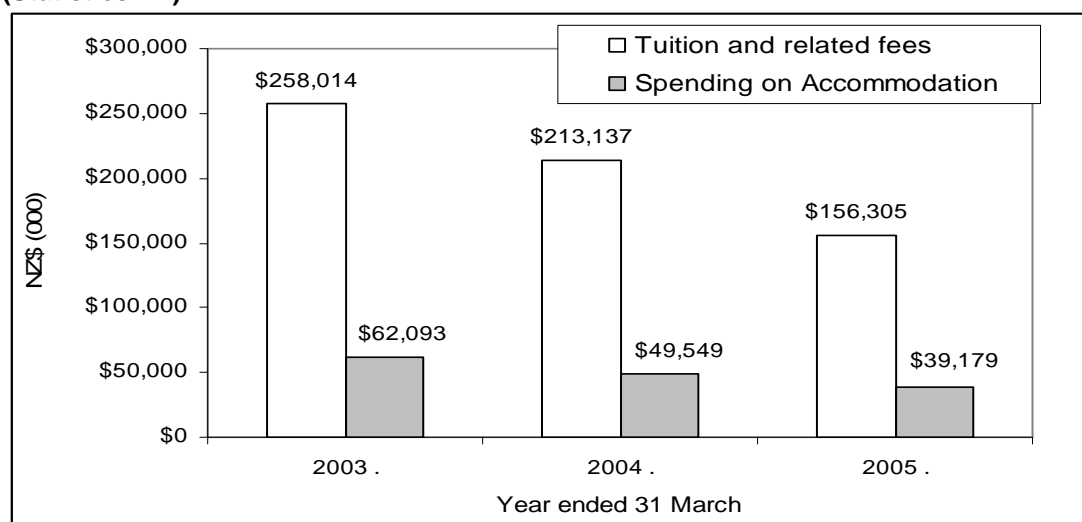
² This is based on the two data sets for student numbers: the July Ministry of Education returns (all compulsory sector, Ministry funded PTE's and state tertiary institutions), and the Statistics New Zealand March ELS survey. Average fees and multiplier numbers are then applied to this data to produce the economic impact. The average fees, and the multiplier, are based on a comprehensive analysis prepared by Infometrics in 2000.

Table 4: Tuition fee income by sector (Ministry of Education)

Export Education Levy database for calendar years	2003	2004	% change
Primary schools	\$31,725,917	\$29,487,240	-7.1%
Secondary schools	\$135,093,732	\$125,100,578	-7.4%
	\$166,819,649	\$154,587,818	-7.3%
Universities	\$263,502,044	\$339,457,082	28.8%
Polytechnics/Institutes of Technology	\$89,194,442	\$94,757,147	6.2%
Colleges of Education	\$3,414,971	\$4,539,753	32.9%
Subsidiary providers	\$14,688,114	\$8,812,927	-40.0%
	\$370,799,571	\$447,566,909	20.7%
Private Tertiary Establishments	\$72,889,431	\$65,057,509	-10.7%
English Language Schools	\$132,454,529	\$107,946,468	-18.5%
Other tertiary education providers	\$65,400	\$100,150	53.1%
	\$205,409,360	\$173,104,127	-15.7%
Total tuition fee income	\$743,028,580	\$775,258,854	4.3%

Further information is available from Statistics New Zealand, for FFPS enrolled with English language providers, on the level of tuition and related fees and reported spending on accommodation.

Figure 4 shows that overall tuition fees income declined by 39.4 percent from 2003 to 2005, and student spending on accommodation declined by 36.9 percent over the period.

Figure 4: Expenditure data: Students enrolled with English language providers (Statistics NZ)

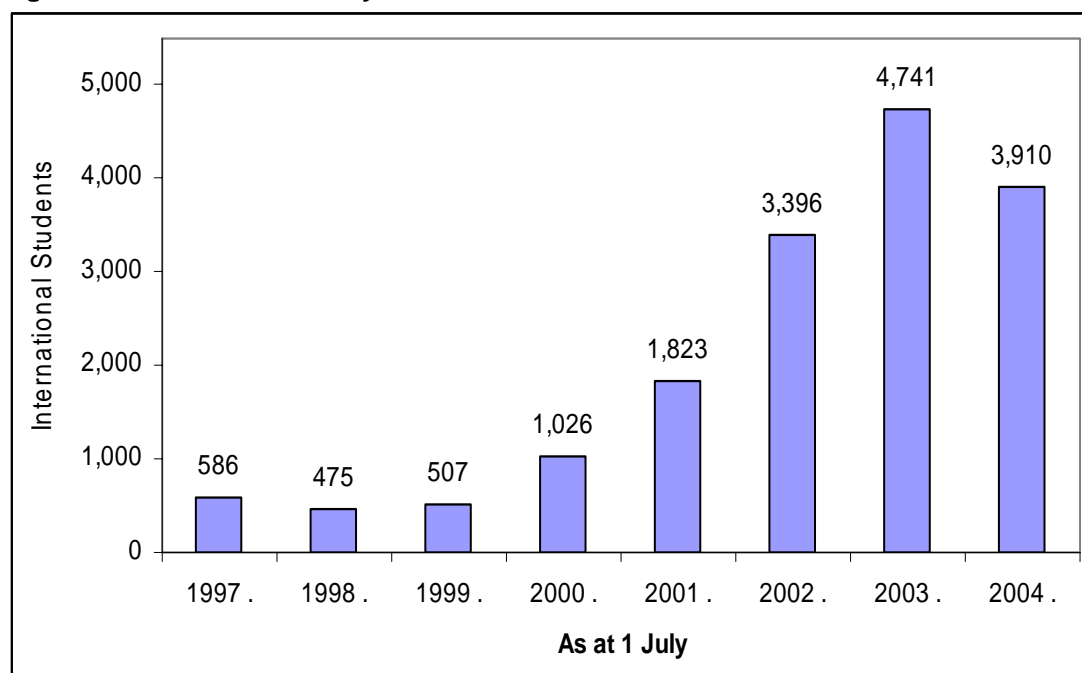
Note: The different tuition fee income figures stated in Table 4 and Figure 4 are mainly due to the different time periods used for the collection of this data.

Foreign Fee-Paying Students in Primary Schools

Trend in student numbers

There was a constant increase in the numbers of FFPS enrolled in primary schools from 1992 to 2003, with a period of extraordinarily rapid growth from 1999. By 2003, numbers of primary FFPS had grown by 835 percent from 1999, from 507 to 4741. This trend did not continue into 2004, however, with an 18 percent decrease in numbers reported, as shown in Figure 5.

Figure 5: Numbers of Primary FFP Students



Primary students by economy of origin

Virtually all (97 percent) of the 3,910 FFPS in primary schools in 2004 were Asian. A total of 3,460, or 89 percent, were from South Korea alone. The next largest cohorts enrolled at New Zealand primary schools numbered between 50 and 80 students, drawn from Japan, Thailand, China and Taiwan. There was no region outside of Asia that provided over 40 primary FFPS.

There was a 19 percent decrease in number of South Korean students enrolled at New Zealand primary schools, from 4,262 in 2003, to 3,460 in 2004.

Table 5 shows the number of FFPS in primary schools by region of origin from 1999 to 2004. Within each region only the economies with the greatest number of students are shown.

Table 5: Primary FFP Students by region and economy of origin

Region	Economy	1999	2000	2001	2002	2003	2004
Pacific		70	76	64	88	55	36
	Solomon Islands	11	16	15	23	14	10
	Fiji	15	16	14	18	10	14
	Papua New Guinea	7	6	10	9	10	5
	Tonga	13	12	11	15	9	2
	New Caledonia					6	2
ASIA		395	892	1,680	3,233	4,606	3,798
	South Korea	196	636	1,266	2,872	4,262	3,460
	Japan	16	30	47	65	68	76
	Taiwan	39	62	58	49	66	53
	Thailand	34	39	48	83	65	63
	People's Republic of China	23	33	59	66	60	58
	Malaysia	19	16	7	26	25	21
	Indonesia	19	16	4	13	8	7
	Philippines	3	6	5	12	8	10
	Hong Kong SAR	11	23	20	18	18	18
	India	9	7	14	7	8	11
	Cambodia	7	10	9	7	4	4
	Singapore	2	2	1	4	4	6
	Vietnam	2	3	3	3	4	4
NORTH AMERICA		9	10	17	17	19	16
	United States of America	8	10	14	13	17	14
CENTRAL AND SOUTH AMERICA		1	7	6	12	9	9
	Chile					4	2
AFRICA		9	8	20	10	14	13
	South Africa	8	3	10	2	4	6
	Uganda	0	0	4	4	3	0
EUROPE		23	32	32	32	36	34
	England	4	11	5	14	10	11
	Russia	4	7	8	7	7	9
	France					7	3
MIDDLE EAST		0	1	4	4	2	1
Totals		507	1,026	1,823	3,396	4,741	3,910

Note The sum of the figures stated in tables 5 and 6 may differ from the total of 3,910 primary international students, due to some variations in the information stated on the school roll returns.

Regional distribution throughout New Zealand

Auckland and Canterbury were the regions that attracted the most primary FFPS. Auckland remained the most appealing destination, despite a 21 percent decline in the number of FFPS. Of all primary FFPS enrolled in 2004, 56 percent studied in Auckland. This is down from 59 percent in 2003 and 64 percent in 2002. Table 6 shows the regional breakdown of primary school FFPS from 1999 to 2004.

Table 6: Regional Breakdown of Primary FFP Students, 1999 – 2004

Region	1999	2000	2001	2002	2003	2004
Northland	7	9	10	36	40	40
Auckland	295	648	1,199	2,173	2,799	2,207
Waikato	25	47	90	197	317	284
Bay of Plenty	12	24	33	56	109	109
Gisborne	1	1	3	2	7	4
Hawkes Bay	5	9	8	9	18	22
Taranaki					3	7
Manawatu-Wanganui	23	34	48	124	123	99
Wellington	36	57	58	95	166	142
West Coast				2		1
Canterbury	84	175	337	652	1,054	885
Otago	18	20	32	45	79	81
Southland	1		3	1	5	9
Tasman				1	8	3
Nelson		2	1	3	12	16
Marlborough			1		1	1
Total students	507	1,026	1,823	3,396	4,741	3,910

Participation by schools in teaching Foreign Fee-Paying Students

As can be seen in Table 7, the number of primary schools teaching FFPS has dropped for the first time since 1999. The number of primary schools teaching FFPS in 2004 is still larger than in any year prior to 2003. Despite the decline between 2003 and 2004, since 1999 there has been a 104 percent increase in the number of schools teaching FFPS.

Table 7 shows the number of schools with FFPS, by the number of FFPS enrolled.

Table 7: Number of Primary Schools by International Student Enrolments

International student numbers per school	Number of schools					
	1999	2000	2001	2002	2003	2004
1 – 2	187	193	187	188	144	158
3 – 4	45	52	61	95	77	101
5 – 6	17	30	54	60	55	54
7 – 10	3	24	37	62	85	67
11 – 15		6	18	41	59	72
16 – 20		6	13	24	51	30
21 – 30		2	9	23	28	19
31 – 40			2	3	11	7
40+				5	8	6
Total schools	252	313	381	501	518	514

Table 8 sets out the participation rates of primary schools by decile³ in 2003 and 2004. In 2004, as in 2003, approximately 24 percent of primary school FFPS were in decile 10 schools, significantly more than the approximately 15 percent in decile 9. As shown in Table 8, lower decile schools have a lower proportion of the total number of FFPS. Almost 45 percent of decile 10 schools enrolled FFPS in 2004,

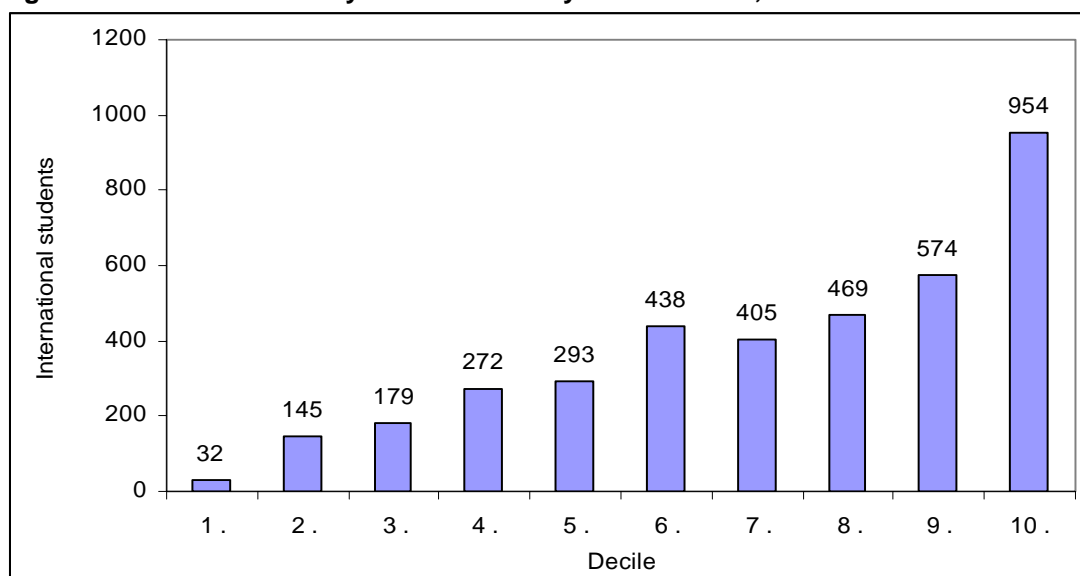
³ All state and state integrated schools are given a decile ranking (1-10), depending on the extent to which they draw from low socio-economic communities. Schools with lower decile rankings have proportionately more students from a low socio-economic background than those with higher decile rankings.

compared to just over 4 percent of decile 1 schools. The numerical distribution of FFPs by decile is illustrated in Figure 6.

Table 8: Participation of Primary Schools in the International Student Market by Decile

	Year	Decile											Total
		1	2	3	4	5	6	7	8	9	10	Do not know	
Number of schools in decile	2003	250	232	232	236	229	222	228	222	236	239	35	2,361
	2004	245	225	228	231	220	218	226	213	236	233	38	2,313
Number of schools with FFP students	2003	14	32	43	48	40	54	55	59	57	100	16	518
	2004	10	27	38	47	41	54	54	61	58	104	20	514
% of schools with FFP students	2003	5.6	13.8	18.5	20.3	17.5	24.3	24.1	26.6	24.2	41.8	45.7	21.9
	2004	4.1	12.0	16.7	20.3	18.6	24.8	23.9	28.6	24.6	44.6	52.6	22.2
% of total FFP student schools	2003	2.7	6.2	8.3	9.3	7.7	10.4	10.6	11.4	11.0	19.3	3.1	100
	2004	1.9	5.3	7.4	9.1	8.0	10.5	10.5	11.9	11.3	20.2	3.9	100
Number of FFP students	2003	48	224	280	335	373	579	509	487	663	1092	152	4,742
	2004	32	145	179	272	293	438	405	469	574	954	149	3,910
% of total FFP students	2003	1.0	4.7	5.9	7.1	7.9	12.2	10.7	10.3	14.0	23.0	3.2	100
	2004	0.8	3.7	4.6	7.0	7.5	11.2	10.4	12.0	14.7	24.4	3.8	100
Average number of FFP students per school	2003	3.4	7.0	6.5	7.0	9.3	10.7	9.3	8.3	11.6	10.9	9.5	9.2
	2004	3.2	5.4	4.7	5.8	7.1	8.1	7.5	7.7	9.9	9.2	7.5	7.6

Figure 6: Number of Primary FFP Students by school decile, 2004

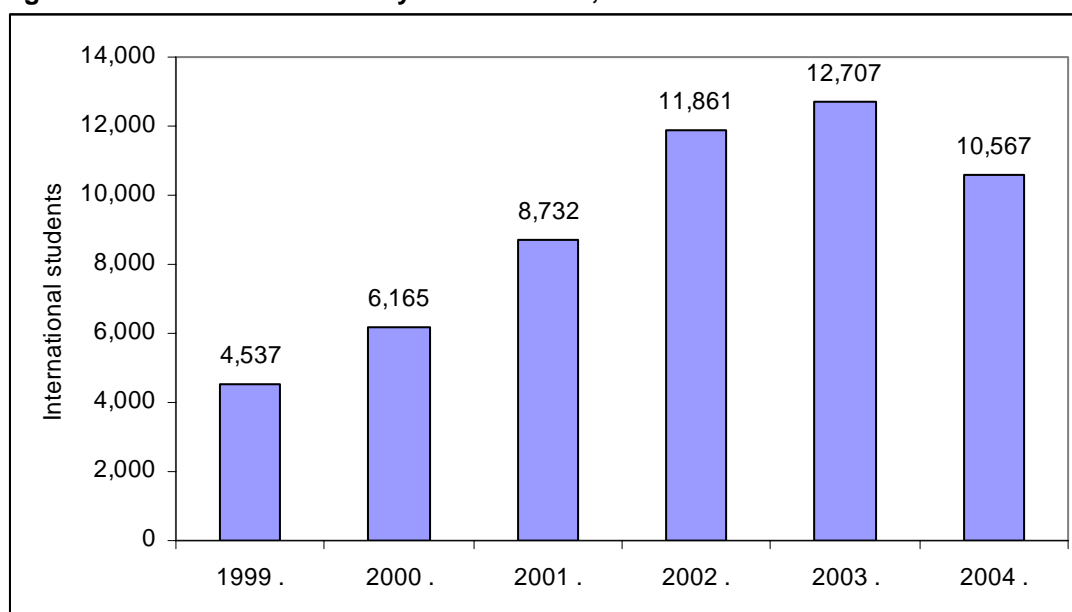


Foreign Fee-Paying Students in Secondary Schools

Trend in student numbers

There was a significant slowing in growth in 2003 over 2002, relative to the growth rate experienced since 1999, and in 2004 this turned into decline. Figure 7 shows that, for the first time since 1999, a decline in international student numbers was reported by secondary schools.

Figure 7: Numbers of Secondary FFP Students, 1999 – 2004



Foreign Fee-Paying Students by economy of origin

The established trend of over 90 percent of secondary FFPS being drawn from Asia continued in 2004. The economies with the highest number of secondary FFPS in New Zealand were China with 3,255 (31 percent), Korea with 3,059 (29 percent) and Japan with 1,454 (14 percent).

The decline that started in 2003 in the number of Chinese secondary FFPS continued but more dramatically, with a 39 percent drop. Despite the overall decline in secondary numbers, the number from South Korea continued to increase, up 3 percent. Table 9 below shows the number of secondary students by region and economy of origin for the period 1999 to 2004. Within each region only the economies with the greatest market share are shown.

Table 9: Secondary FFP Students by Region and Economy, 1999 – 2004

Region	Economy	1999	2000	2001	2002	2003	2004
PACIFIC		205	228	272	236	195	168
	Fiji	56	62	96	76	68	69
	Tonga	54	22	52	43	34	25
	Solomon Islands	22	22	34	37	28	22
	French Polynesia	13	8	15	18	15	15
	Samoa	22	18	15	10	14	9
ASIA		4,019	5,614	8,031	11,343	11,927	9,751
	China	562	1,956	3,495	5,464	5,316	3,255
	Hong Kong SAR	387	351	370	418	396	339
	Korea	770	860	1,356	2,191	2,970	3,059
	Japan	1,049	1,224	1,375	1,417	1,441	1,454
	Thailand	470	474	580	744	888	848
	Taiwan	420	364	372	327	318	277
	Vietnam	22	71	139	214	218	188
	Malaysia	92	74	132	120	122	109
	Indonesia	159	122	90	87	88	76
	Cambodia	25	58	48	55	53	38
	India	15	14	20	24	30	33
	Macau	3	9	5	7	12	11
	Philippines	12	8	7	11	12	7
	Laos	0	0	0	3	11	11
	Maldives	6	11	12	8	11	14
NORTH AMERICA		21	15	14	24	24	16
	United States of America	18	14	12	17	19	11
CENTRAL AND SOUTH AMERICA		170	129	205	204	180	175
	Brazil	164	121	194	201	169	161
AFRICA		12	12	15	5	15	10
	South Africa	9	7	5	2	4	3
EUROPE		106	162	187	248	347	431
	Germany	64	106	139	171	236	307
	Russia	15	19	15	20	37	44
MIDDLE EAST		4	5	8	12	19	16
Totals		4,537	6,165	8,732	11,863	12,707	10,567

Note The sum of the figures stated in tables 9 and 10 may differ from the total of 10,567 secondary international students, due to some variations in the information stated on the school roll returns.

Regional distribution

There was little change in the distribution around New Zealand of FFPS attending secondary schools in 2004 over 2003. Auckland was the only major centre that reported a drop in the proportion of secondary FFPS, with a fall of 4 percent to 48 percent of all secondary Foreign Fee-Paying Students. Despite the overall decline in secondary international numbers in 2004, the Waikato, Bay of Plenty, West Coast and Tasman regions all reported a slight increase in enrolments.

Table 10: Regional Breakdown of Secondary FFP Students, 1999 – 2004

Region	1999	2000	2001	2002	2003	2004
Northland	54	66	66	125	173	139
Auckland	1,940	2,959	4,651	6,398	6,501	5,107
Waikato	238	308	418	511	679	686
Bay of Plenty	151	187	245	386	419	422
Gisborne	12	20	41	52	49	42
Hawkes Bay	114	136	178	221	205	169
Taranaki	26	28	36	56	82	74
Manawatu-Wanganui	275	287	331	514	542	464
Wellington	401	572	663	955	994	836
West Coast	5	6	7	7	12	16
Canterbury	820	971	1,323	1,686	1,938	1,676
Otago	335	442	520	633	720	565
Southland	62	63	89	92	110	97
Tasman	21	17	22	31	37	43
Nelson	70	74	87	116	155	154
Marlborough	13	29	55	80	91	77
Total students	4,537	6,165	8,732	11,863	12,707	10,567

Participation by schools in teaching Foreign Fee-Paying Students

The number of schools teaching FFPS declined slightly in line with the overall fall in student numbers. The number of schools teaching secondary FFPS, however, is still up by 13 percent since 1999. Table 11 shows the number of schools teaching secondary FFPS by the range of enrolled students.

Table 11: Number of Secondary Schools by size of enrolment, 1999 – 2004

Range of FFPS enrolments	1999	2000	2001	2002	2003	2004
1 – 2	51	44	50	37	33	38
3 – 4	27	34	27	25	26	23
5 – 6	23	18	29	24	26	17
7 – 10	51	47	29	23	23	31
11 – 15	38	44	25	28	18	26
16 – 20	20	20	25	25	27	25
21 – 30	28	26	45	47	44	42
31 – 40	19	22	27	27	27	34
40+	25	43	58	86	102	82
Total schools	282	298	315	322	326	318

Table 12 shows that FFPS as a percentage of enrolments have increased significantly since 1999, but declined from 2003 to 2004. In what are traditionally the last two years of secondary school (Years 12 and 13), the percentage of secondary FFPS more than doubled from 1999 to 2003.

Table 12 illustrates secondary international student participation as a percentage of total secondary enrolments.

Table 12: Secondary FFP Students as a Percentage of Total Enrolments

Year	1999	2000	2001	2002	2003	2004
Year 9	0.3	0.5	0.8	1.0	1.4	1.2
Year 10	0.8	1.0	1.4	1.9	2.0	1.9
Year 11	1.6	2.4	2.4	3.1	3.4	3.1
Year 12	3.5	4.3	5.6	7.3	7.0	6.1
Year 13	3.9	6.1	8.5	12.6	11.1	8.2
Year 14	2.4	3.6	19.3	22.7	28.5	28.1
Year 15	2.7	2.2	54.6	35.2	60.5	34.6

The majority of secondary FFPS were spread throughout the upper decile schools. In both 2003 and 2004, decile 7 schools had the highest proportion of secondary FFPS with 25.7 percent and 20.7 percent, respectively.

In 2004, over 90 percent of decile 9 and decile 10 schools enrolled FFPS, compared to just over 10 percent of decile 1 schools. Table 13 sets out the participation rates of secondary schools in the international student market, by decile, in 2004.

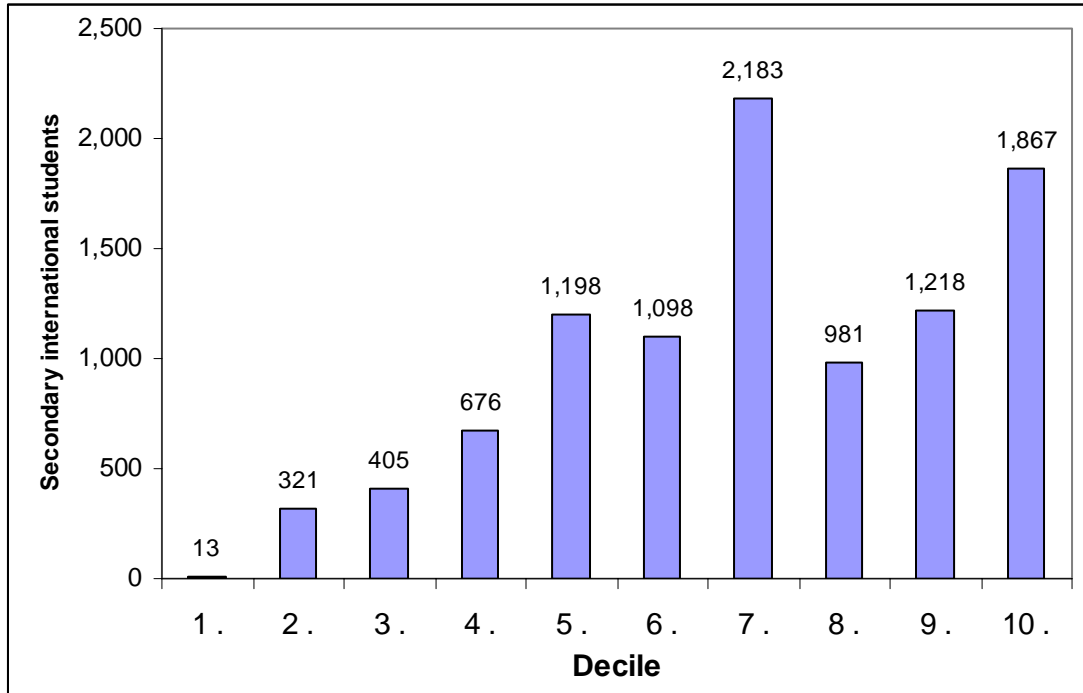
Table 13: Participation of Secondary Schools⁴ in the International Student Market

	Year	Decile											Total
		1	2	3	4	5	6	7	8	9	10	Do not know	
Number of schools in decile	2003	42	54	45	56	56	50	51	38	32	46	34	504
	2004	44	54	44	57	56	51	49	39	32	46	38	510
Number of schools with FFP students	2003	7	22	19	37	36	36	42	29	30	44	24	326
	2004	5	23	17	34	34	36	40	31	30	44	24	318
% of Schools with FFP students	2003	16.7	40.7	42.2	66.1	64.3	72.0	82.4	76.3	93.8	95.7	70.6	64.7
	2004	11.4	42.6	38.6	59.6	60.7	70.6	81.6	79.5	93.8	95.7	63.2	62.4
% of FFP students in schools	2003	2.1	6.7	5.8	11.3	11.0	11.0	12.9	8.9	9.2	13.5	7.4	100
	2004	1.6	7.2	5.3	10.7	10.7	11.3	12.6	9.7	9.4	13.8	7.5	100
Number of FFP students	2003	31	412	635	949	1384	1303	3266	1074	1279	1893	479	12705
	2004	13	321	405	676	1198	1098	2183	981	1218	1867	607	10567
% of total FFP students	2003	0.2	3.2	5.0	7.5	10.9	10.3	25.7	8.5	10.1	14.9	3.8	100
	2004	0.1	3.0	3.8	6.4	11.3	10.4	20.7	9.3	11.5	17.7	5.7	100
Average number of FFP students per school	2003	4.4	18.7	33.4	25.6	38.4	36.2	77.8	37.0	42.6	43.0	20.0	39.0
	2004	2.6	14.0	23.8	19.9	35.2	30.5	54.6	31.6	40.6	42.4	25.3	33.2

The distribution of secondary FFPS by school decile is shown in Figure 8.

⁴ Includes composite schools (Year 1 – 13)

Figure 8: Number of Secondary FFP Students by decile, 2004

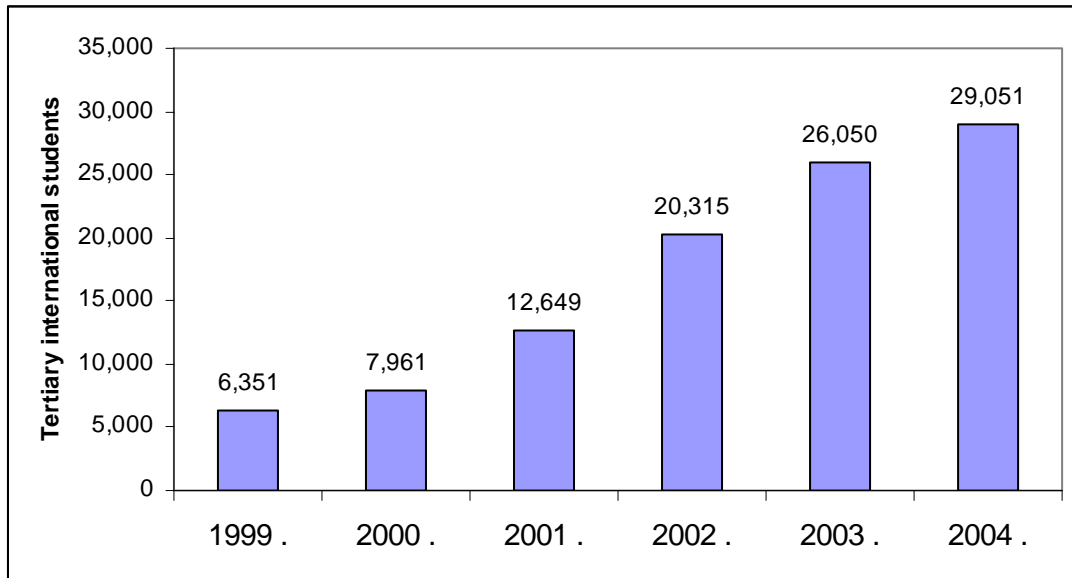


Foreign Fee-Paying Students in Public Tertiary Institutions

Trend in student numbers

The growth in the numbers of FFPS enrolling in public tertiary education institutions (TEIs) continued in 2004, with an 11.5 percent increase over 2003, as shown in Figure 9.

Figure 9: Numbers of FFP Students at Public Tertiary Institutions



TEIs are made up of four types of institutions: universities, polytechnics/institutes of technology, colleges of education, and wananga. Table 14 illustrates the different growth patterns by provider type from 1999 to 2004. It can be seen that universities have experienced the largest numerical increases in international enrolments, boosting their proportion of total tertiary FFPS to over 70 percent in 2004.

Although enrolling modest numbers, Colleges of Education have experienced the largest percentage increases in recent years, more than doubling between 2001 and 2002 and then doubling again between 2002 and 2003. There was a 37 percent increase in the number of FFPS enrolled at Colleges of Education between 2003 and 2004.

Table 14: Numbers of FFP Students studying at Public Tertiary Institutions

Institution Type	1999	2000	2001	2002	2003	2004
Polytechnics	2,495	2,416	4,337	6,802	7,219	7,526
Colleges of Education	99	81	65	139	297	409
Universities	3,757	5,462	8,246	13,373	18,532	21,116
Wananga	0	2	1	1	2	0
Totals	6,351	7,961	12,649	20,315	26,050	29,051

Foreign Fee-Paying Students by economy of origin

Asia remains the main regional contributor of FFPS to public tertiary providers. In 2004, 88 percent of public tertiary FFPS were from Asia.

In 2004, China provided 68 percent of total public tertiary FFPS. Malaysia became the second largest national source of public tertiary FFPS in 2004, with 3 percent of all students, followed by the United States of America, South Korea, and India.

Table 15 sets out the number of FFPS in public tertiary institutions by region and economy for the period 1999 to 2004. Within each region, only the economies with the greatest numbers of students are shown.

Table 15: Public Tertiary FFP Students by Region and Economy, 1999 – 2004

		1999	2000	2001	2002	2003	2004
1. PACIFIC		486	616	741	894	784	712
	Fiji	201	235	344	378	348	329
	Tonga	77	119	93	213	148	133
2. Asia		4,966	6,276	10,545	17,462	22,815	25,603
	China	457	1,696	5,236	11,677	17,004	19,763
	Malaysia	1,552	1,235	1,126	871	841	973
	South Korea	358	509	753	1,009	902	927
	India	61	190	333	814	945	883
	Japan	725	707	766	770	769	744
	Hong Kong SAR	396	375	465	435	421	399
	Thailand	353	361	409	423	380	377
	Viet Nam	31	51	129	202	274	331
	Taiwan	369	396	417	373	316	297
	Indonesia	298	309	347	330	279	254
	Singapore	202	195	180	176	200	205
	Sri Lanka	53	63	78	111	121	112
3. NORTH AMERICA		283	401	459	706	1,011	1,157
	United States of America	241	354	397	604	839	970
4. CENTRAL & SOUTH AMERICA		40	41	56	75	99	98
	Chile	1	2	10	13	23	19
	Brazil	12	20	22	20	17	15
	Mexico	8	5	13	21	48	37
5. AFRICA		50	62	97	154	168	203
	South Africa	18	23	29	45	37	64
	Zimbabwe	1	7	19	31	36	38
6. EUROPE		397	533	680	918	1,062	1,101
	Germany	65	102	101	189	194	184
	Great Britain	91	119	137	178	227	309
	Sweden	70	99	114	137	118	91
	Norway	60	95	139	166	200	182
	Russia	17	19	44	80	103	137
7. MIDDLE EAST		12	32	70	105	109	163
	Saudi Arabia	1	9	31	34	42	54
Totals		6,351	7,961	12,649	20,315	26,050	29,051

Regional distribution

Auckland, with almost 40 percent of public tertiary FFPS, was the most popular region for study. Both Wellington and Canterbury had much higher growth rates than Auckland in 2004, although the highest growth rate in the country was experienced by Otago, with a 35 percent increase in student numbers.

There were also a number of decreases in 2004 over 2003, most noticeably in the Bay of Plenty, Gisborne, Southland, and Nelson regions. Table 16 below shows the regional breakdown of public tertiary FFPS for the period 2003 – 2004.

Table 16: Regional Breakdown of Public Tertiary FFP Students, 2003-2004⁵

Region	2003	2004	% change from 2003 -2004
Auckland	10,310	11,095	7.6
Bay Of Plenty	328	230	-29.9
Canterbury	3,498	4,362	24.7
Gisborne	116	69	-40.5
Hawkes Bay	225	222	-1.3
Manawatu-Wanganui	1,349	1,600	18.6
Marlborough	8	13	21.0
Nelson	189	130	-31.2
Northland	72	94	30.6
Otago	1,453	1,965	35.2
Southland	81	62	-23.5
Taranaki	152	173	13.8
Tasman	2	2	0.00
Waikato	2,680	2,992	11.6
Wellington	4,238	4,810	13.5
West Coast	7	3	13.5
Missing	172	0	
Not Applicable	1,170	1,229	
Total	26,050	29,051	11.5

* Students are considered to be 'Not Applicable' for the following reasons:

- the student is studying extramurally or by distance learning, either in New Zealand or overseas
- the student is studying at an overseas campus of a New Zealand provider

Participation in teaching Foreign Fee-Paying Students

Table 17 shows a general trend towards public tertiary institutions enrolling increasing numbers of FFPS per institution between 1999 and 2004.

Table 17: Public Tertiary Institutions Teaching FFP Students

Number of FFP Students per institution	Number of Institutions					
	1999	2000	2001	2002	2003	2004
1 – 100	20	23	14	10	11	8
101 – 300	4	3	8	9	8	7
301 – 500	4	3	3	2	3	5
501 – 700	3	3	3	1	2	1
700+	2	4	6	10	10	11

Table 18 illustrates the number of public tertiary FFPS as a percentage of the total roll, broken down by institution types in 2004. Universities reported the highest number of FFPS as a percentage of the total roll, with 15.2 percent, compared to the polytechnics with 6.4 percent.

⁵ Prior to 2000, tertiary enrolments were not reported on a regional basis.

Table 18: FFP Students / Total Roll Numbers at Public Tertiary Institutions

		Polytechnics	Colleges of Education	Universities	Wananga	Total
2004	FFPS	7,526	409	21,116	0	29,051
	Total Roll	117,514	11,107	138,583	41,644	308,848
	FFPS %	6.4%	3.7%	15.2%	0.0%	9.4%

Field of study

Numbers of public tertiary FFPS studying Management and Commerce subjects continued to grow with a 73 percent increase from 2002 to 2004. Management and Commerce subjects account for an increasing proportion of all public tertiary FFPS, growing from 43 percent in 2002 to 52 percent in 2004.

Mixed Field Programmes and Society and Culture were the next most popular choices, but both experienced a drop in enrolment numbers for 2004. Engineering and Related Technologies experienced a 48 percent growth in enrolments from 2003. Table 19 sets out the number of public tertiary FFPS by field of study for the period 2002 to 2004.

Table 19: Public Tertiary FFP Students by Field of Study, 2002 – 2004

Field of Study	2002	2003	2004	% of enrolments, 2004
1. Natural and Physical Sciences	1,286	1,724	2,087	7.2%
2. Information Technology	1,225	1,530	1,781	6.1%
3. Engineering and Related Technologies	759	992	1,475	5.1%
4. Architecture and Building	197	277	323	1.1%
5. Agriculture and Environmental Studies	120	139	215	0.7%
6. Health	481	667	904	3.1%
7. Education	166	308	446	1.5%
8. Management and Commerce	8,742	13,086	15,174	52.2%
9. Society and Culture	3,357	3,090	2,853	9.8%
10. Creative Arts	639	717	823	2.8%
11. Food, Hospitality & Personal Services	174	280	436	1.5%
12. Mixed Field Programmes	3,169	3,240	2,534	8.7%
Total	20,315	26,050	29,051	100%

Subject Level

In 2004 a total of 63 percent of all FFPS were enrolled in under-graduate (i.e. Bachelors) degree programmes, followed by diplomas (16.8 percent) and certificates (13.2 percent), with the fewest enrolments in post-graduate qualifications (6.7 percent). See Table 20.

Table 20: Number of FFP Students by Qualification Award Level and Sector

		PROGRAMME AWARD CATEGORY				Total
		Post-graduate Degree	Under-graduate Degree	Diploma	Certificate	
2004	Polytechnics	77	2,349	2,780	2,320	7,526
	Colleges of Education	20	159	147	83	409
	Universities	1,872	15,841	1,955	1,448	21,116
	Total	1,969	18,349	4,882	3,851	29,051
	Proportions	6.8%	63.2%	16.8%	13.2%	100%

International Students in Private Training Establishments

There is no complete data picture available of the private training sector and the data which is available in relation to private training establishments (PTEs), which include English Language schools, is limited compared to that for the public tertiary sector.

Private Training Establishments (Ministry of Education data)

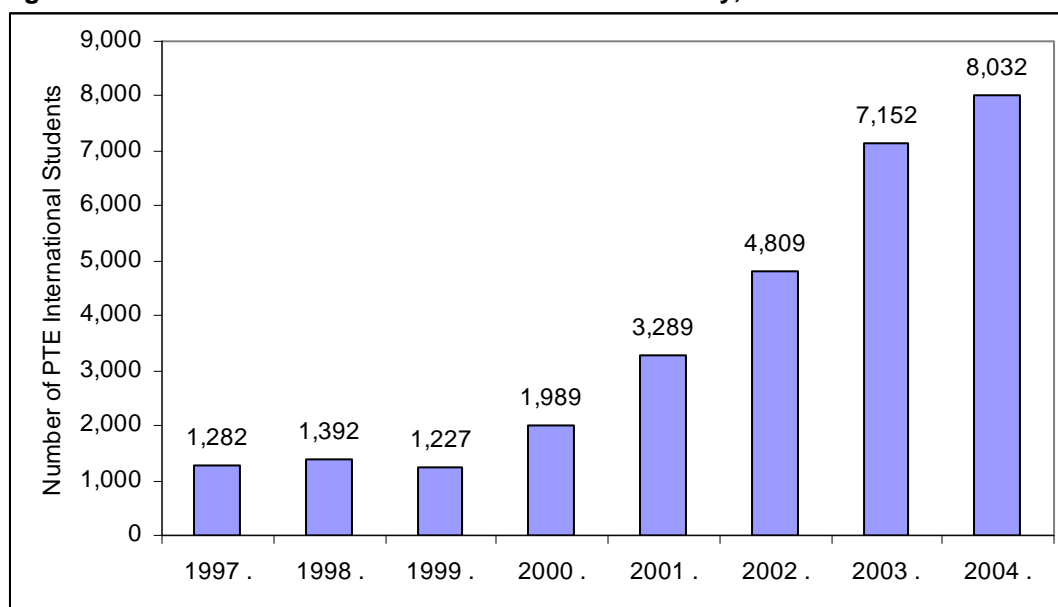
The Ministry of Education receives statistical returns, in the same way as for public tertiary institutions, from those PTEs that are in receipt of tuition subsidies from the Ministry and/or are recognised for student loans and allowances. This however only represents a minority of the private training providers. It does not include most English language schools, for example, which concentrate on foreign fee-paying students. These providers generally do not qualify for government tuition subsidies, or loans and allowances that are only available for students who are New Zealand citizens or permanent residents.

The Ministry sends a questionnaire to all other PTEs registered with the New Zealand Qualifications Authority (NZQA). However, despite a very good response rate, the majority of providers report no foreign students at the time of the survey, which is generally a one-week snapshot in July.

This may partly reflect the nature of the provider's business, with a number of short courses being offered throughout the year, as opposed to a full year programme. However, it also reflects the way in which data is requested. As a result, foreign fee-paying (FFP) student numbers appear to be lower than is actually the case.

Based on the July statistical returns for both funded and unfunded providers, FFP student numbers appear to be stabilising after a period of strong growth. Returns for 2004 show an increase of 12% compared with annual increases of over 45% since 1999. Figure 10 sets out the number of FFP students in PTEs, based on the July statistical returns, between 1997 and 2004.

Figure 10: Numbers of FFP Students in PTEs as at 31 July, 1997 to 2004



English Language Schools (Statistics New Zealand data)

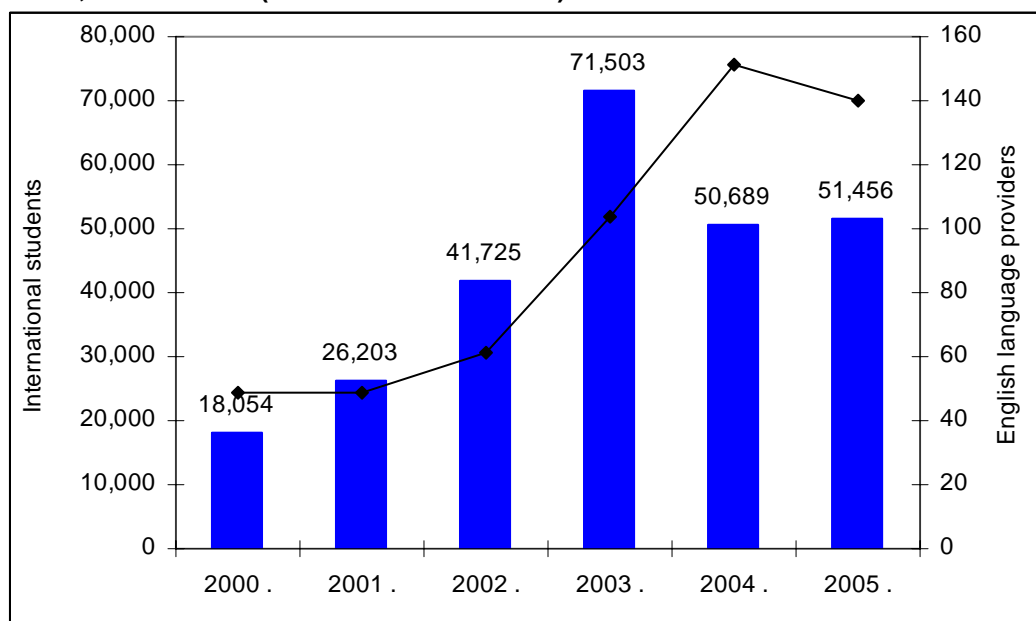
Statistics New Zealand conducts annual data collections from English Language schools through its yearly Survey of English Language Providers. These form part of its reporting on New Zealand's balance of payments.

The surveys for the years ending 31 March 2003 through 2005 were surveys of all known New Zealand private, polytechnic and university English language schools with non-resident students. Foreign Fee-Paying Students enrolled in other courses, for example formal tertiary qualifications, are recorded separately.

Figure 11 displays the numbers of Foreign Fee-Paying Students reported to be enrolled with English language providers, and the number of providers. Student numbers rose from 18,054 for the year ended 31 March 2000 to a peak of 71,053 for the year ended 31 March 2003. Enrolments declined in 2004, and have since stabilised at 51,456 for the year ended 31 March 2005.

The number of surveyed English language providers increased from 49 in 2000 to a peak of 151 in 2004, and then declined to 140 in 2005.

Figure 11: FFP Students enrolled at English Language Providers for years ending 31 March, 2000 to 2005 (Statistics New Zealand)



Note: The differences in the 2004 FFP figures stated in Figure 11 and Table 1 are due to the use of provisional data.

Economies of origin

Private Training Establishments (Ministry of Education data)

Based on the July return for both funded and unfunded providers, there was an increase of 12% in numbers of FFP students studying at PTEs in 2004 over 2003. The majority of FFP students in the private training sector were of Asian citizenship (83% in 2004, down from 93% in 2003). The most common economy of origin of FFP students in 2004 was China, with 60% of all FFP students in PTEs. Chinese student numbers showed a slight decrease from 4,903 students in 2003 to 4,827 students in 2004.

Table 21 sets out the region and country of citizenship for private tertiary FFP students for the period 2000 to 2004, based on the Ministry's July return for both funded and unfunded providers. Within each region only the countries with the greatest numbers of students are shown.

Table 21: Numbers and Percentages of FFP Students in PTEs by Economy of Origin as at 31 July, 2003 and 2004, surveyed by the Ministry of Education

Economy of Origin	2003 Numbers	2004 Numbers	2003 Percentages	2004 Percentages
1. PACIFIC	124	127	1.7	1.6
Fiji	62	64	0.9	0.8
Samoa	11	15	0.2	0.2
Tonga	20	15	0.3	0.2
2. ASIA	6,659	6,677	93.1	83.1
Cambodia	27	23	0.4	0.3
China	4903	4827	68.6	60.1
Hong Kong	31	35	0.4	0.4
India	438	381	6.1	4.7
Indonesia	43	55	0.6	0.7
Japan	246	302	3.4	3.8
Malaysia	22	29	0.3	0.4
Pakistan	16	16	0.2	0.2
South Korea	648	677	9.1	8.4
Sri Lanka	12	19	0.2	0.2
Taiwan	97	111	1.4	1.4
Thailand	88	81	1.2	1.0
Viet Nam	58	82	0.8	1.0
3. NORTH AMERICA	68	54	1.0	0.7
Canada	26	26	0.4	0.3
United States of America	42	28	0.6	0.3
4. CENTRAL & SOUTH AMERICA	40	34	0.6	0.4
Brazil	12	15	0.2	0.2
5. AFRICA	29	48	0.4	0.6
South Africa	15	29	0.2	0.4
Zimbabwe	7	16	0.1	0.2
6. EUROPE	187	182	2.6	2.3
Germany	21	18	0.3	0.2
Great Britain	83	62	1.2	0.8
Russia	35	35	0.5	0.4
7. MIDDLE EAST	44	41	0.6	0.5
Saudi Arabia	26	32	0.4	0.4
NOT STATED	1	869	0.0	10.8
Total Foreign Fee-Paying Students	7,152	8,032	100.0	100.0

English Language Schools (Statistics New Zealand data)

The great majority of students at English Language Providers were of Asian origin, with Japan as the most common economy of origin (26%), followed by China (23%) and South Korea (17%). Table 22 sets out a comparison of the number of students at English Language providers by economy of origin between the years ending 31 March 2003 to 31 March 2005.

Table 22: Numbers and Percentages of FFP Students at English Language Providers by Economy of Origin, Years ended 31 March 2003 to 2005 (Statistics New Zealand)

Economy of origin	Number			Percentages		
	2003	2004	2005	2003	2004	2005
Japan	13,736	11,840	13,417	19.2	23.4	26.1
China, People's Republic of	27,598	18,617	11,673	38.6	36.7	22.7
Korea, Republic of	12,283	7,845	8,663	17.2	15.5	16.8
Switzerland	1,615	1,561	2,332	2.3	3.1	4.5
Thailand	2,944	1,511	2,115	4.1	3.0	4.1
Taiwan	3,056	1,416	1,744	4.3	2.8	3.4
Germany	1,215	1,130	1,506	1.7	2.2	2.9
Brazil	1,046	743	1,240	1.5	1.5	2.4
Russia	383	367	970	0.5	0.7	1.9
Saudi Arabia	229	317	922	0.3	0.6	1.8
France	171	236	489	0.2	0.5	1.0
Hong Kong (SAR)	655	325	375	0.9	0.6	0.7
Viet Nam	930	671	336	1.3	1.3	0.7
Chile	66	87	292	0.1	0.2	0.6
New Caledonia	254	241	290	0.4	0.5	0.6
French Polynesia	288	361	246	0.4	0.7	0.5
Indonesia	218	170	194	0.3	0.3	0.4
Czech Republic	235	225	188	0.3	0.4	0.4
India	449	178	167	0.6	0.4	0.3
Oman	..C	67	114	..C	0.1	0.2
Italy	103	97	113	0.1	0.2	0.2
Spain	113	97	105	0.2	0.2	0.2
Argentina	81	68	93	0.1	0.1	0.2
Cambodia	220	110	71	0.3	0.2	0.1
Country Unspecified	2,285	1,453	2,163	3.2	2.9	4.2
Other Countries	1,330	956	1,638	1.9	1.9	3.2
Total	71,503	50,689	51,456	100.0	100.0	100.0

Notes: 'C' means confidential.

Regional Distribution

The majority of FFP students at PTEs studied in Auckland in 2004. PTEs based in the top five regions (Auckland, Canterbury, Taranaki, Waikato, and Wellington) accounted for 95 percent of the total student enrolments. This is shown in Table 23.

Table 23: Regional breakdown of PTE FFP Students, 2004 (Ministry of Education)

	Number	Percentage
Auckland	6,290	78.3
Canterbury	769	9.6
Taranaki	231	2.9
Waikato	234	2.9
Wellington	102	1.3
Manawatu-Wanganui	37	0.5
Southland	32	0.4
Bay Of Plenty	65	0.8
Hawkes Bay	10	0.1
Northland	13	0.2
Otago	56	0.7
Nelson	38	0.5
Missing / Unspecified	148	1.8
Not Applicable	7	0.1
Total	8,032	100.0

Subject Choice

The majority of FFP students were enrolled in programmes in the field of *management and commerce* or *mixed field programmes*, the two fields accounting for 75 percent of all enrolments as at 2004.

Table 24: Numbers of FFP Students at PTEs by Field of Study, 2002 – 2004 (Ministry of Education)

Field of Study	Number			Percentage		
	2002	2003	2004	2002	2003	2004
1. Natural and Physical Sciences	1	0	1	0.0	0.0	0.0
2. Information Technology	423	1,165	411	8.8	16.3	5.1
3. Engineering and Related Technologies	59	108	79	1.2	1.5	1.0
4. Architecture and Building	9	14	17	0.2	0.2	0.2
5. Agriculture and Environmental Studies	30	2	25	0.6	0.0	0.3
6. Health	43	83	125	0.9	1.2	1.6
7. Education	28	48	63	0.6	0.7	0.8
8. Management and Commerce	1,282	2,455	3,266	26.7	34.3	40.7
9. Society and Culture	1,066	769	652	22.2	10.8	8.1
10. Creative Arts	134	314	411	2.8	4.4	5.1
11. Food, Hospitality & Personal Services	33	113	212	0.7	1.6	2.6
12. Mixed Field Programmes	1,701	2,081	2,770	35.4	29.1	34.5
Total	4,809	7,152	8,032	100.0	100.0	100.0

Data Sources and Definitions

Foreign Fee-Paying (FFP) Students

"Foreign fee-paying students" includes all Foreign Fee-Paying Students who pay full fees, but does not include Ministry of Foreign Affairs and Trade (MFAT) or New Zealand Agency for International Development (NZAID) sponsored students, exchange students or domestic tertiary students who pay partial tuition fees.

Primary and Secondary

Year of schooling (1-15) measures the number of years of schooling a student has received. It provides the Ministry of Education with a method of counting students for funding and staffing purposes that is independent of the way schools are organised or the particular programme of study that a student may be undertaking.

Therefore, in these sections, the primary sector is based on years 1-8, and the secondary sector is based on years 9-15.

Data for both the primary and secondary sector are drawn from the July statistical return made to the Ministry of Education by each school. This return is a headcount of all students enrolled at 1 July and therefore may include part-time students.

Decile Number

All schools are given a decile number (1-10), depending on the socio-economic status of the area they serve. Schools with lower decile numbers draw on communities with lower socio-economic status, while schools with higher decile numbers draw on communities with higher socio-economic status.

Economy of Origin

Note that not all economies of origin of FFP students are shown for each region. Economies listed are the main source economies only.

Public Tertiary

The term 'public tertiary' includes universities, polytechnics and institutes of technology, colleges of education, and wananga. Wananga are centres for tertiary learning according to Maori traditions and customs. Data for the public tertiary sector are based on July returns made to the Ministry by public tertiary institutions. The figures are based on student numbers as at 31 July of the return year and do not include students enrolled in very short courses of duration less than a week or 0.03 of a full-time course load.

Private Training Establishments (PTEs)

PTEs include non-public providers of tertiary programmes and English language schools. Two data sources have been used in this report for the private training area: Ministry of Education July snapshot data, based on statistical returns made to the Ministry by providers; and Statistics New Zealand data from the annual census/survey of English Language providers.