MINISTRY OF EDUCATION
Te Tāhuhu o te Mātauranga

INTERNATIONAL STUDENT ENROLMENTS IN NEW ZEALAND

2006 – 2012

1 May 2013

International Division
Ministry of Education

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Introduction

This report is the latest in a series of annual summaries of the publicly available data, from three main sources, on the number of enrolments of international fee-paying students with New Zealand education providers. This report covers the period from 2006 to 2012. Summary information is also stated on the numbers of approved student visas to 2012, and international enrolments in tertiary (higher) education.

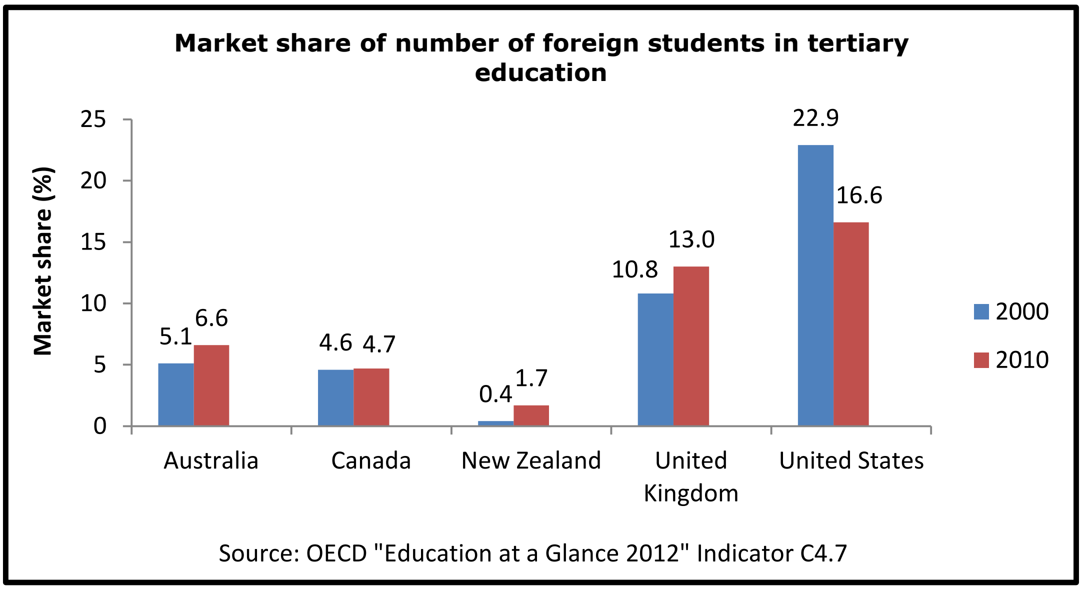
This information is disaggregated by origin, according to the key markets of North Asia, South-East Asia, South Asia, the Middle East, Europe, Latin America and North America. The estimated economic value-added to New Zealand from international education is also referenced.

Overview

The Education Act 1989 provides the legislative framework for the enrolment of fee-paying international students by New Zealand schools and tertiary education institutions. The issuing of visas for international students is regulated by the provisions of the Immigration Act 2009.

New Zealand education providers experienced a rapid rise in their international enrolments from 1998 to 2003, driven primarily by interest from Chinese students. New Zealand was one of the first Western countries to permit open access to student visas by Chinese nationals, a measure quickly followed by Australia, the United Kingdom, Canada and the United States of America. This group is generally known as the 'main English-speaking destination countries' (MESDC) for international fee-paying students.

The following chart illustrates the respective market shares of international tertiary students by the MESDC group, including New Zealand (note: this data *excludes* school students and enrolments with private English language providers). It is apparent that New Zealand's market share rose from 0.4% in 2000, to 1.7% in 2010.



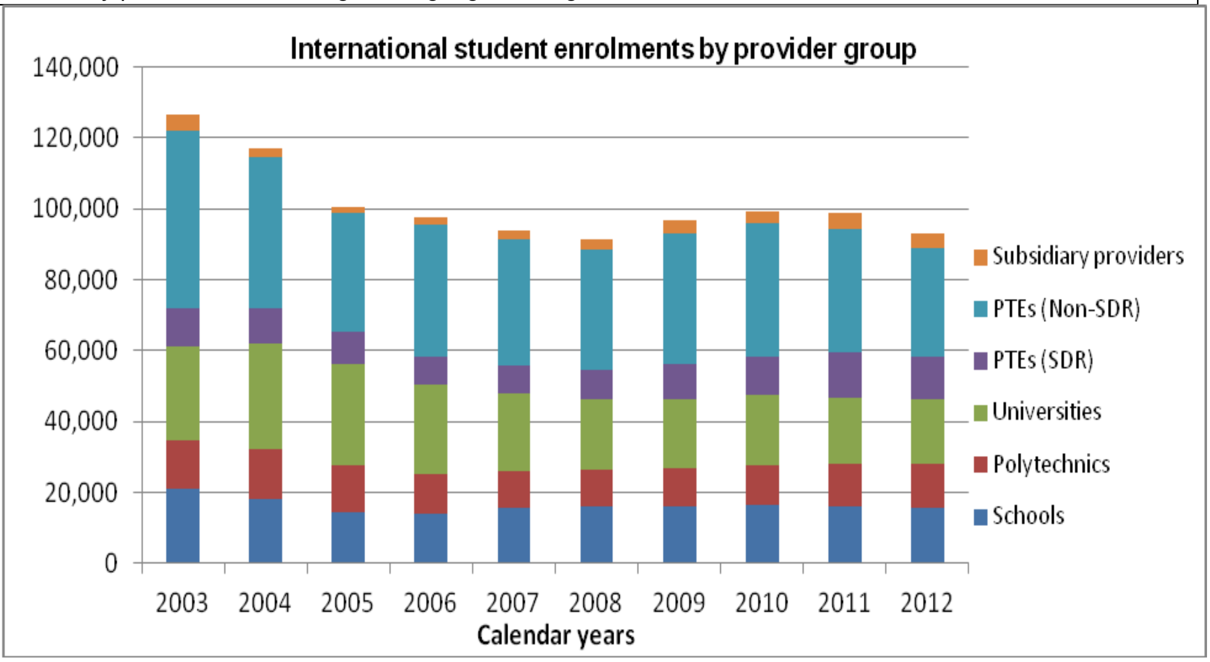
Summary of enrolment trends

From a peak of 126,503 international fee-paying enrolments in 2003 there was a 27.7% decline to 91,388 enrolments in 2008, and a subsequent 8.8% recovery to 99,446 enrolments during 2010. Compared to 2011, during the 2012 calendar year there was a 5.7% decrease in international student enrolments to 92,995.

The reduction was likely to have been partly due to the consequences of the Christchurch earthquake of 22 February 2011, which has led to a marked fall in enrolments in Canterbury (see Table 16 of this report), and also to the rising value of the New Zealand dollar (see Table 5). The value of the currency is known to particularly affect enrolments in 'non-SDR PTEs', mainly English language providers.

Table 1: International enrolments by provider groups	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Schools	20,935	18,311	14,447	13,934	15,512	16,015	15,898	16,486	16,140	15,645
ITPs	13,868	13,957	13,155	11,299	10,625	10,586	10,911	11,281	11,821	12,255
Universities	26,305	29,796	28,721	25,175	21,748	19,562	19,424	19,678	18,690	18,300
PTEs (SDR)	10,916	9,817	8,808	7,776	7,743	8,463	9,863	10,847	12,911	12,199
PTEs (non SDR)	50,064	42,704	33,574	37,371	35,722	33,887	37,156	37,688	34,895	30,505
Subsidiary	4,413	2,488	1,830	2,192	2,586	2,875	3,644	3,466	4,203	4,091
Totals	**126,503**	**117,081**	**100,543**	**97,748**	**93,936**	**91,388**	**96,896**	**99,446**	**98,660**	**92,995**
Year % change		*-7.5%*	*-14.1%*	*-2.8%*	*-3.9%*	*-2.7%*	*6.0%*	*2.6%*	*-0.8%*	*-5.7%*

Source: Export Education Levy (EEL) for the full calendar year for schools, public tertiary education institutions, and private training establishments. The EEL data is published on 'Education Counts' (http://www.educationcounts.govt.nz/statistics/international/international-students-in-new-zealand)
Notes: Public Tertiary Education Institutions are the eight universities (including the colleges of education), 20 institutes of technology/polytechnics (ITPs) and the three wānanga. Private Training Establishments (PTEs) are described as 'Single Data Return' (SDR) or 'non-SDR'. The latter category *includes* English language providers, which do not receive government-funded student subsidies and so do not complete the SDR.
Subsidiary providers are the English-language training affiliates of the universities, and some schools.

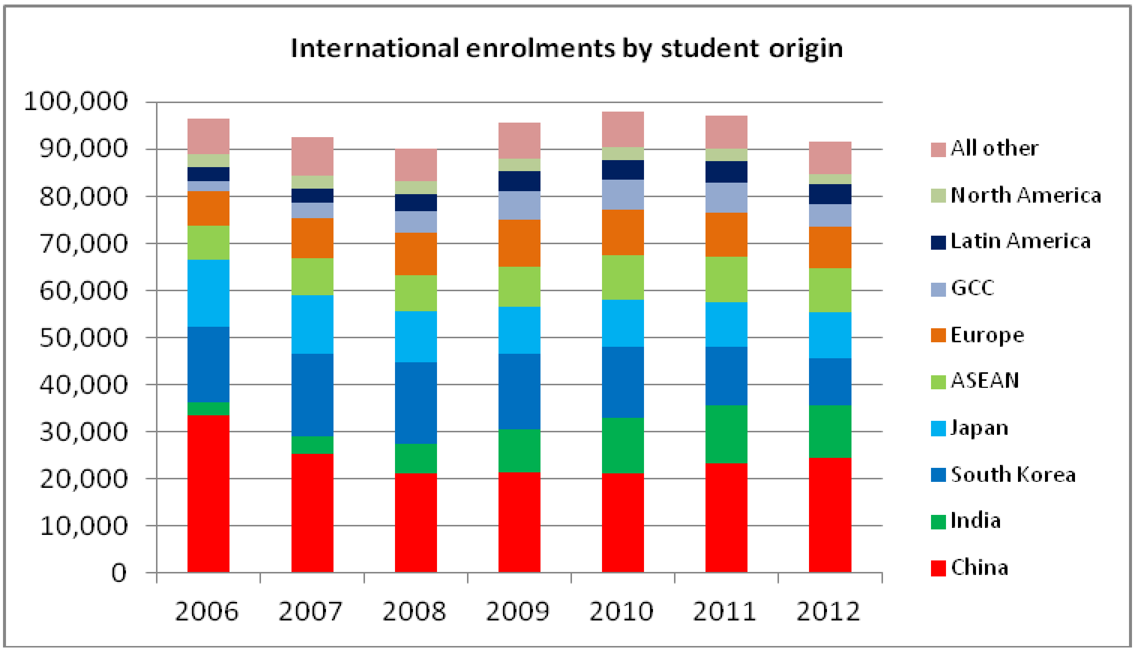


International students by origin

From 2006 the Export Education Levy system has requested information from providers on the nationalities of their students. The information on enrolments can be disaggregated by the origins of the students, as shown in Table 2 (the total figures are slightly different because some students enrol with more than one provider). A key trend evident since 2010 has been the rise in Chinese enrolments, and falls in South Korean enrolments. From 2006 to 2011 there were rapid rises in enrolments from India and the Gulf Co-Operation Council (GCC), though these dropped in 2012.

Table 2: International students by origin	2006	2007	2008	2009	2010	2011	2012	*% change, 2011 - 2012*
China	33,649	25,216	21,080	21,327	21,256	23,366	24,412	*4.5%*
India	2,599	3,855	6,348	9,252	11,616	12,301	11,349	*-7.7%*
South Korea	15,930	17,500	17,331	16,070	15,283	12,396	9,990	*-19.4%*
Japan	14,299	12,325	10,755	9,761	9,745	9,312	9,563	*2.7%*
ASEAN	7,356	7,816	7,809	8,701	9,507	9,723	9,351	*-3.8%*
Europe	7,139	8,536	8,832	9,857	9,747	9,490	8,817	*-7.1%*
GCC	2,143	3,214	4,707	6,049	6,150	6,343	4,900	*-22.7%*
Latin America	2,968	3,226	3,514	4,222	4,404	4,497	4,026	*-10.5%*
North America	2,746	2,751	2,704	2,737	2,742	2,544	2,226	*-12.5%*
All other	7,554	8,063	6,998	7,462	7,588	7,031	7,098	*1.0%*
Totals	**96,383**	**92,502**	**90,078**	**95,438**	**98,038**	**97,003**	**91,732**	***-5.4%***

China includes the Hong Kong SAR. Association of South-East Asian Nations (*ASEAN)* is Indonesia, Thailand, Vietnam, Malaysia, Singapore, Brunei, Laos, Myanmar, Philippines, & Cambodia. *Europe* is Germany, France, Spain, Switzerland, Czech Republic, United Kingdom, Russia, & Italy. *Latin America* is Brazil, Chile, Colombia & Mexico. *North America* is a total for the USA & Canada. *Gulf Co-Operation Council (GCC)* is Saudi Arabia, Oman, Kuwait, Bahrain, Qatar & the United Arab Emirates.



The next chart shows the relative importance of the 'top 5' source countries – China, South Korea, India, Japan, and Saudi Arabia – for each of the provider groups during 2012. It is apparent that South Korea, China and Japan are key sources of students for schools, with 61.3% of all students coming from those three nations. South Korean students made up 66.8% of international enrolments in primary schools. Students from India (25.6%) and China (32.0%) are key source markets for the polytechnics. Chinese students made up 37.4% of fee-paying enrolments in the eight universities.

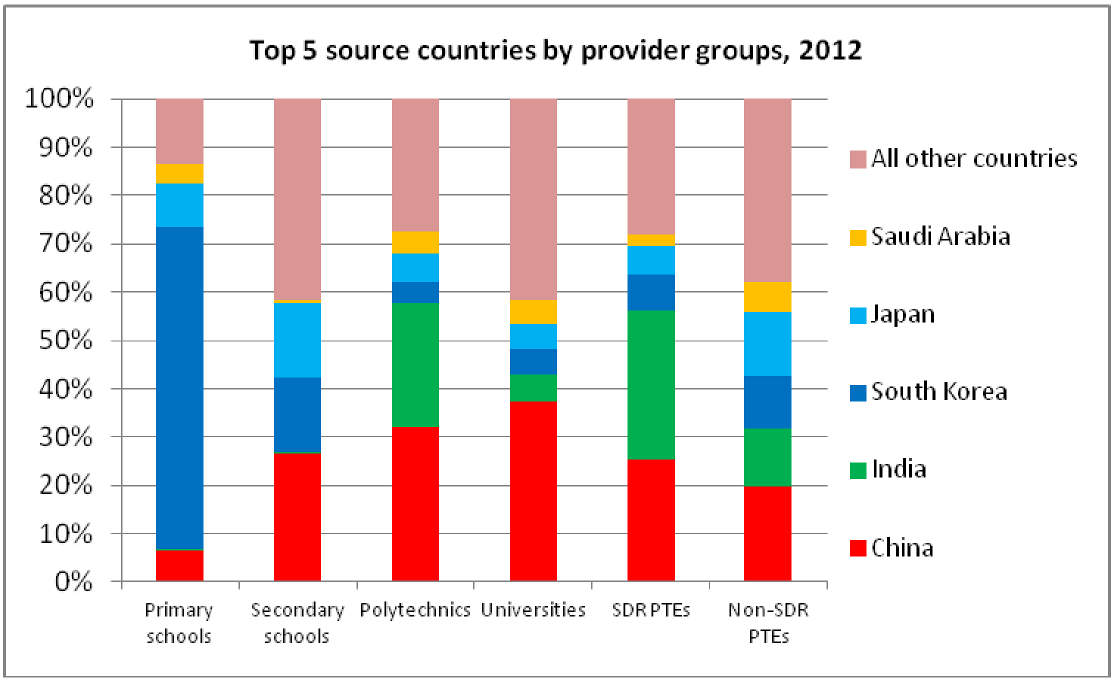
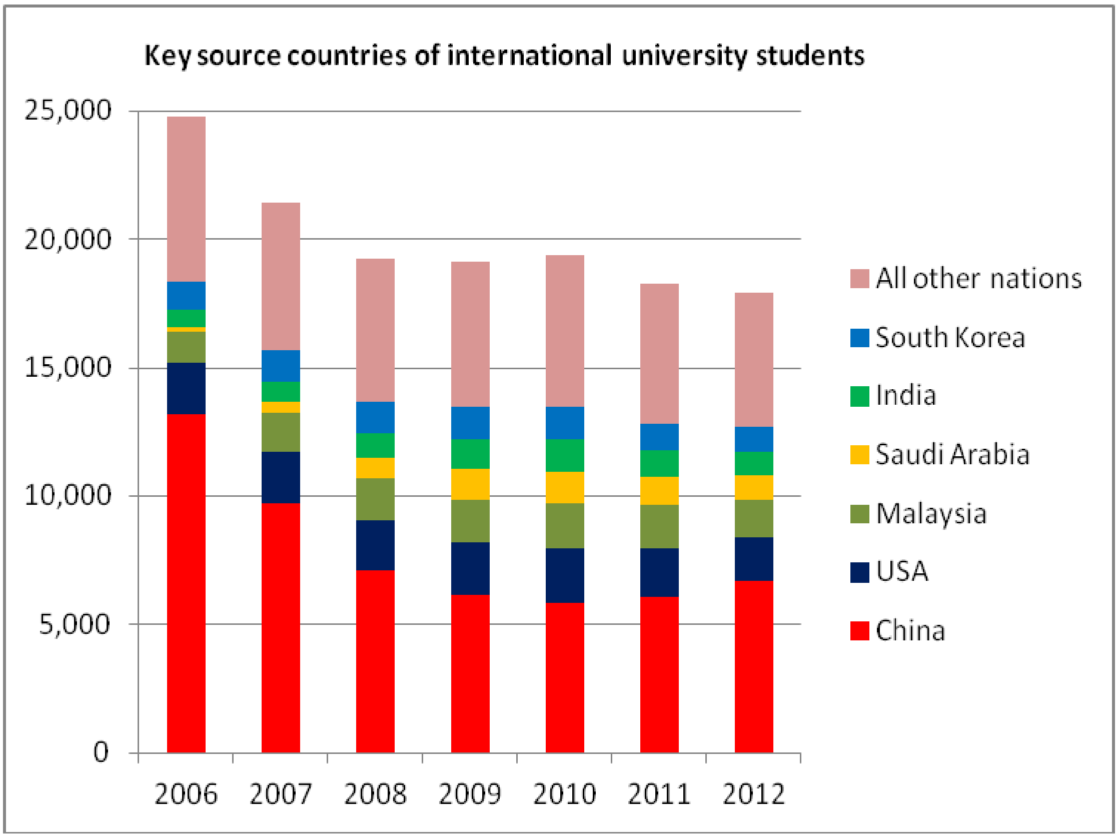


Table 3 and the associated chart shows the trend in the key source countries for international fee-paying students enrolled in the universities, from 2006 to 2012. The fall in Chinese enrolments from 2006 to 2010 is apparent, and the subsequent rise in these students from 2010 to 2012. The marked increase in enrolments from India and Saudi Arabia from 2006 to 2010 has been followed by respective declines to 2012. USA student numbers have been relatively constant over time, although these also declined from 2010 to 2012.

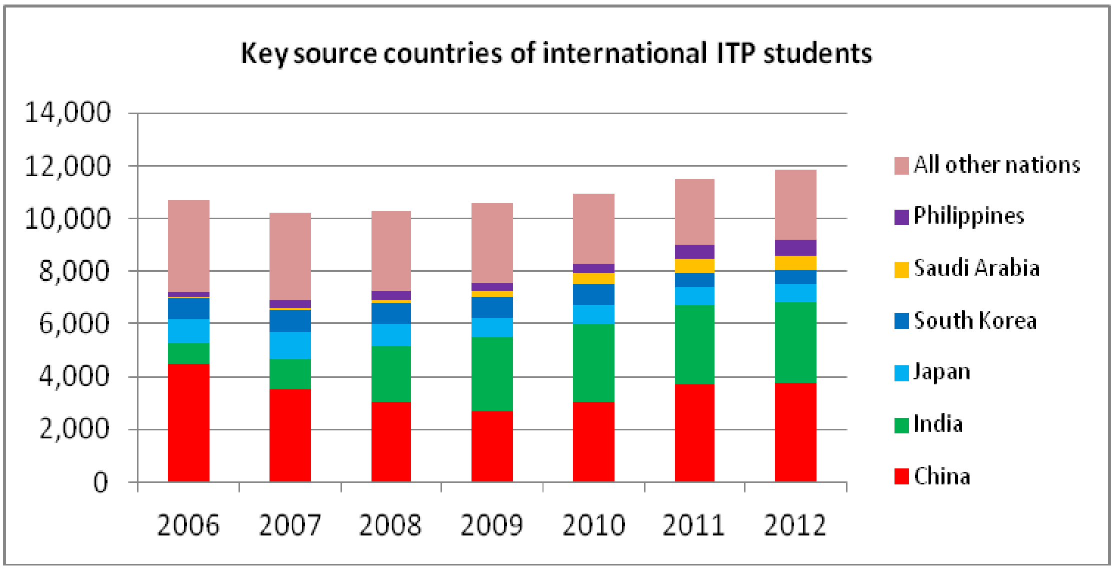
Table 3: New Zealand university international students	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**
China	13,167	9,730	7,098	6,164	5,860	6,089	6,709
USA	1,987	1,999	1,949	2,018	2,115	1,882	1,688
Malaysia	1,248	1,520	1,637	1,666	1,717	1,659	1,465
Saudi Arabia	201	414	810	1,212	1,245	1,102	922
India	644	774	952	1,146	1,243	1,059	964
South Korea	1,115	1,217	1,219	1,263	1,278	1,042	933
All other nations	6,409	5,755	5,587	5,5654	5,896	5,467	5,254
Totals	**24,771**	**21,409**	**19,252**	**19,123**	**19,354**	**18,300**	**17,935**



Note: The annual total of fee-paying *students* differs from the total of *enrolments* stated in Table 1, because a small number of students enrol more than once each year.

Table 4 details the trend in the key source countries for international fee-paying students enrolled in the Institutes of Technology/Polytechnics (ITPs), from 2006 to 2012. A similar trend to that for the universities is evident in the fall in Chinese student enrolments from 2006 to 2009, recovering from 2010 to 2012. It is clear that Indian students have grown to be a key market for the ITPs.

Table 4: New Zealand ITP international students	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**
China	4,513	3,521	3,054	2,651	3,020	3,710	3,792
India	744	1,174	2,077	2,874	3,001	2,993	3,039
Japan	921	970	853	724	725	674	700
South Korea	782	850	791	759	758	577	537
Saudi Arabia	43	72	121	228	404	529	538
Philippines	209	293	388	350	398	505	591
All other nations	3,500	3,313	2,985	3,004	2,660	2,473	2,667
Totals	**10,712**	**10,193**	**10,269**	**10,590**	**10,966**	**11,461**	**11,864**



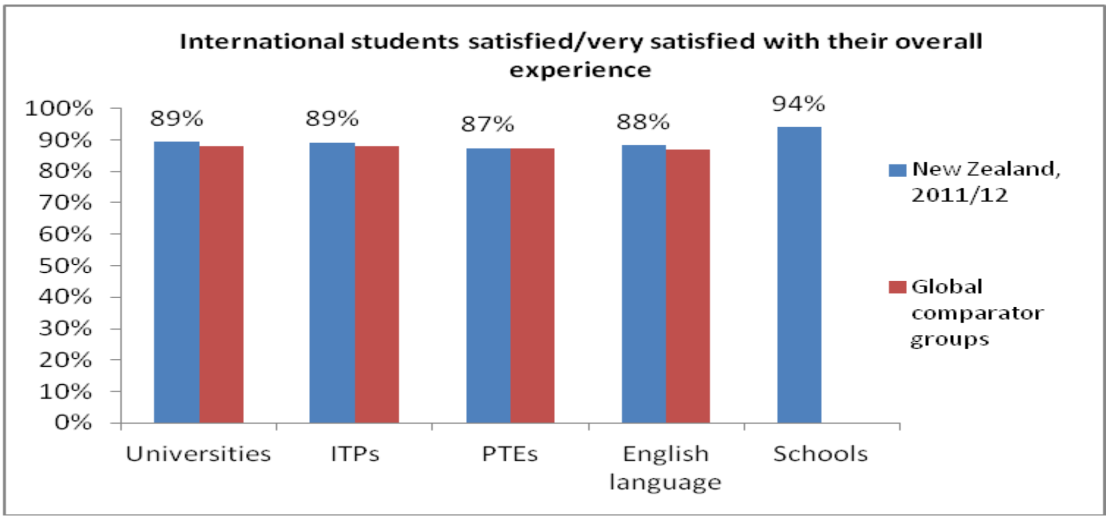
Note: The annual total of students differs from the total of enrolments stated in Table 1, because a small number of students enrol more than once each year

Summary of student experience surveys

The Ministry of Education contracted the International Graduate Insight Group (i-graduate) to undertake surveys of international students enrolled with New Zealand education providers. A total of 12,246 international students responded to online questionnaires in 2011 and 2012 across the five international education sectors.

Students rated their overall New Zealand education experience very highly. Students in secondary schools (schools) gave the highest overall rating, with 94% of students satisfied or very satisfied. Students studying in private training establishments (PTEs) gave a very high rating of 87% satisfied or very satisfied.

The ratings of international students at New Zealand providers were compared by i-graduate with the ratings of international students in other countries. The percentage of students satisfied or very satisfied with their overall experience in New Zealand was the same or higher than for students in the global comparator groups. The survey in schools was the first completed by i-graduate, and therefore no i-graduate international comparison data for schools exists as yet. Further information on the detailed survey results can be found on the 'Education Counts' website.



Relationship between enrolments and the New Zealand dollar

Table 5 and the associated set of charts present simple correlations of the value of the New Zealand dollar (NZ$) against the United States dollar (US$), averaged over each of the 2003 to 2012 calendar years, against the annual level of international fee-paying enrolments in the universities, institutes of technology/polytechnics, SDR and non-SDR Private Training Establishments, schools and subsidiary providers.

The United States dollar is used for the currency comparison because there is strong international competition for international students, and the US$, as the global reserve currency, is generally used as an indicator of relative cost-competitiveness. The United States also has the highest level of market share of international tertiary students (ref: OECD *Education at a Glance*, 2012: www.oecd.org).

As the value of the New Zealand dollar increases, it becomes relatively more expensive for international students to study in New Zealand. Table 5 shows the results of using a simple Pearson correlation to measure the strength and direction of the linear relationship between the NZ$/US$ rate, and the number of international fee paying students enrolled at different education institutions in New Zealand. The hypothesis is that as the value of the NZ$/US$ increases, then the number of international student enrolments would decrease.

In support of the hypothesis there was a statistically significant relationship, at the 99% confidence interval, between enrolments in 'non-SDR PTEs' (i.e. mainly English language providers) and the value of the New Zealand dollar. Enrolments of international students in English language providers are reported to share similarities with features of the tourism sector, in that enrolments in short courses are often delivered as part of a New Zealand vacation. There is strong international competition for short-term visitors, and relative currency values would be expected to affect their decision-making on which countries to visit.

Table 5: International fee-paying student enrolments and the NZ$/US$ rate, 2003 to 2012	*Correlation (r)*	*R-squared*	*P-value*
Universities	-0.56	0.32	0.092
Institutes of Technology/Polytechnics (ITPs)	-0.31	0.10	0.38
SDR Private Training Establishments	0.39	0.15	0.27
Non-SDR Private Training Establishments	-0.80	0.64	<0.01
Schools	-0.47	0.22	0.17
Subsidiary Providers	0.12	0.01	0.741

For the universities there was a negative trend between the NZ$/US$, and the number of international fee paying students. In other words, as the value of the New Zealand dollar increased the number of international fee paying students enrolled in New Zealand universities decreased. The R-squared value for the universities was 0.32, meaning approximately 32% of the variation in the number of enrolments can be explained by the NZ$/US$ rate, and the remaining 68% can be explained by unknown variables or inherent variability in the number of enrolments. Universities in other countries are active competitors for international students, and these factors would be expected to have affected enrolments in New Zealand universities.

There was no significant relationship between currency and international enrolments for the 'SDR PTEs', subsidiary providers, Institutes of Technology/Polytechnics, or schools. This could indicate that, for these sectors, there are more important factors influencing their international enrolments than the value of the New Zealand dollar.

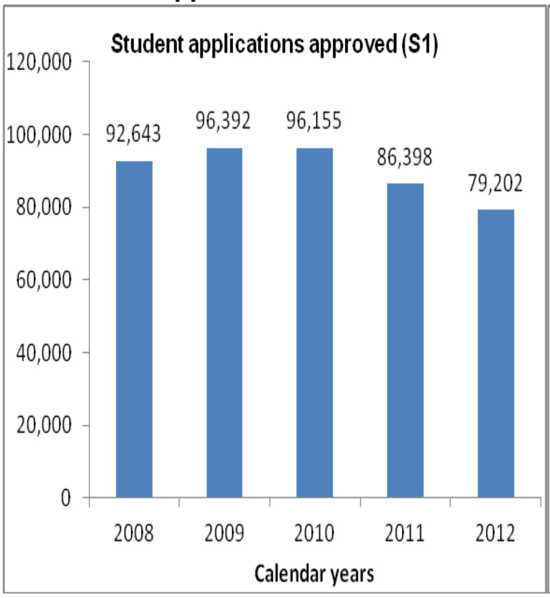
International student enrolments and the NZ$/US$ rate

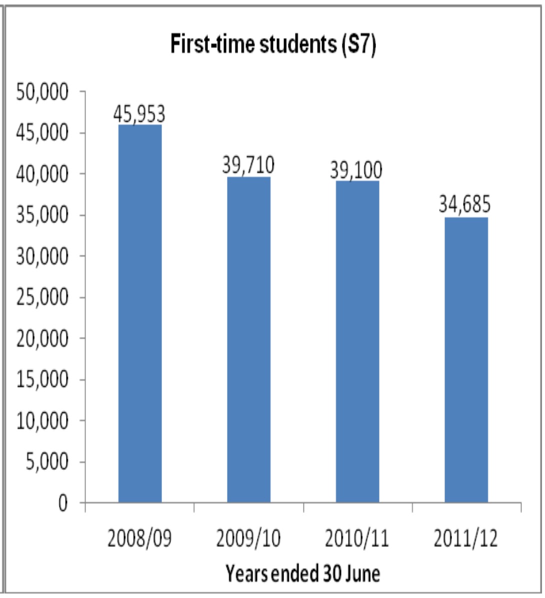
Student visas

The Ministry of Business, Innovation and Employment (Immigration New Zealand) collates information on the numbers of approved applications for student visas and permits. The information for total (S1) and first-time approvals (S7) is summarised in the charts below. The number of *first-time* approved student visas and permits is a leading indicator of changes in demand from prospective international students, and the trends evident in first-time approvals are generally reflected in total approvals and enrolment figures in subsequent years.

A comparison of the detailed student visa data with the enrolment information for calendar years shows that there is usually a close relationship. The notable exceptions are that the visas approved for people from Japan (and South Korea, to a lesser extent) are much lower than the enrolment numbers. This is because many Japanese students who are enrolled in short courses with English language providers are understood to be in New Zealand on *visitor* visas, which are not included in the student visa records.

Student visa applications





Enrolment changes by key source countries

This section provides breakdowns of information, from the Export Education Levy, on the annual changes in international fee-paying students enrolled in each provider group according to key source countries. Broad geographic categories are used in each table to enable simple comparisons of the source countries in the respective regions/national groupings. The enrolment information for 2011 has been updated, and may differ from that stated in an earlier report.

North Asia

The single largest proportion of international enrolments in New Zealand continues to come from the three North Asian countries of China, Japan, and South Korea. These three countries provided 48% of all enrolments in 2012. There are also a significant number of students from Taiwan.

Table 6: North Asia student enrolments	*China (including Hong Kong SAR)*		*Japan*		*South Korea*		*Taiwan*	
	2011	**2012**	**2011**	**2012**	**2011**	**2012**	**2011**	**2012**
Schools	3,022	3,618	1,827	2,255	4,374	3,719	326	296
Polytechnics	3,710	3,792	674	700	577	537	82	75
Universities	6,089	6,709	927	959	1,042	933	278	240
SDR PTEs	2,961	2,961	614	697	1,050	847	100	87
Non-SDR PTEs	6,588	6,046	4,354	4,056	4,800	3,299	882	687
Subsidiaries	996	1,286	916	896	553	655	102	63
Totals	**23,366**	**24,412**	**9,312**	**9,563**	**12,396**	**9,990**	**1,770**	**1,448**

The spread of Chinese students across provider groups was concentrated within the public tertiary education institutions and private training establishments. It is apparent that most Japanese students enrolled within private training establishments, as did students from Taiwan. South Korean students were concentrated in the schools and private training establishments, with fewer people enrolled in the public tertiary education institutions.

Association of South East Asian Nations

The following table shows a sectoral breakdown for the four largest South East Asian source countries for international students. There were decreases in student enrolments recorded from Thailand and Malaysia from 2011 to 2012. There were wide variations in the enrolment patterns of students. Malaysian students were mainly enrolled in the universities, whereas Thai students were predominantly enrolled with schools and private training establishments.

Table 7: South-East Asia student enrolments	*Thailand*		*Malaysia*		*Vietnam*		*Philippines*	
	2011	**2012**	**2011**	**2012**	**2011**	**2012**	**2011**	**2012**
Schools	1,258	1,176	96	81	423	357	20	32
Polytechnics	113	113	142	125	168	169	505	591
Universities	251	223	1,659	1,465	719	794	48	42
SDR PTEs	277	277	82	89	305	267	380	184
Non-SDR PTEs	997	936	91	68	399	461	260	382
Subsidiaries	91	117	18	8	143	110	6	3
Totals	**2,987**	**2,842**	**2,088**	**1,836**	**2,157**	**2,158**	**1,219**	**1,234**

South Asia

There was an 8% decline in enrolments of students from India from 2011 to 2012, particularly within private training establishments. In 2012 there was a 30% growth in enrolments of students from Sri Lanka.

Table 8: South-Asia student enrolments	*India*		*Pakistan*		*Bangladesh*		*Sri Lanka*	
	2011	**2012**	**2011**	**2012**	**2011**	**2012**	**2011**	**2012**
Schools	70	56	3	1	2		4	4
Polytechnics	2,993	3,039	26	28	19	27	144	175
Universities	1,059	964	35	32	31	21	74	86
SDR PTEs	4,037	3,612	30	25	42	39	231	316
Non-SDR PTEs	4,131	3,671	33	52	35	33	83	117
Subsidiaries	11	7	3	1				1
Totals	**12,301**	**11,349**	**130**	**139**	**129**	**120**	**536**	**699**

Gulf Co-Operation Council (GCC)

Students from the GCC who are studying in New Zealand are overwhelmingly from the Kingdom of Saudi Arabia, and these students have mainly enrolled in private training establishments – predominantly English language schools, including subsidiary providers (i.e. 54% in 2012). In 2012 there was a 26% decline in Saudi enrolments with New Zealand providers.

Table 9: GCC student enrolments	*Kingdom of Saudi Arabia*		*Oman*		*United Arab Emirates*		*Kuwait*	
	2011	**2012**	**2011**	**2012**	**2011**	**2012**	**2011**	**2012**
Schools	258	183	13	11	12	9	13	37
Polytechnics	529	538	4	1	3	3	1	
Universities	1,102	922	111	93	42	34	48	106
SDR PTEs	339	298	4	11	36	37	1	1
Non-SDR PTEs	2,812	1,886	60	64	42	47	41	44
Subsidiaries	606	375	29	45	9	4	77	74
Totals	**5,646**	**4,202**	**221**	**225**	**144**	**134**	**181**	**262**

Europe

The summary enrolment information for the top four European source countries is stated in Table 10. With the exception of German students, European enrolments were concentrated within private training establishments. From 2011 to 2012 the enrolments of German and Swiss students fell by 13% and 15%, respectively.

Table 10: European enrolments	*Germany*		*France*		*Switzerland*		*Russia*	
	2011	**2012**	**2011**	**2012**	**2011**	**2012**	**2011**	**2012**
Schools	2,141	1,907	83	100	47	36	129	133
Polytechnics	123	104	74	85	11	10	96	95
Universities	321	242	124	134	19	21	176	167
SDR PTEs	52	41	85	109	10	16	111	113
Non-SDR PTEs	877	780	1,540	1,508	1,013	865	540	542
Subsidiaries	17	4	46	57	64	42	55	30
Totals	**3,531**	**3,078**	**1,952**	**1,993**	**1,164**	**990**	**1,107**	**1,080**

Latin America

Enrolments of students from Latin America (defined as the Central and South America regions) were mainly with private training establishments. Enrolment information for the top four source countries is stated in Table 11. In 2012 Brazilian enrolments declined by 16%, whereas Colombian enrolments rose by 26%.

Table 11: Latin America enrolments	*Brazil*		*Chile*		*Colombia*		*Mexico*	
	2011	**2012**	**2011**	**2012**	**2011**	**2012**	**2011**	**2012**
Schools	417	350	110	149	55	59	52	52
Polytechnics	55	58	32	26	8	15	21	33
Universities	44	32	59	36	25	22	21	23
SDR PTEs	291	353	31	37	64	73	26	26
Non-SDR PTEs	2,107	1,631	361	302	329	506	86	54
Subsidiaries	115	109	53	24	94	52	15	4
Totals	**3,029**	**2,533**	**646**	**574**	**575**	**727**	**221**	**192**

North America

Enrolments of students from North America (overwhelmingly the United States of America) were predominantly with the universities. Overall enrolment levels declined by 10% from 2011 to 2012.

Table 12: North America student enrolments	*United States of America*		*Canada*	
	2011	**2012**	**2011**	**2012**
Schools	64	59	15	11
Polytechnics	65	57	19	25
Universities	1,882	1,688	166	127
SDR PTEs	69	76	106	89
Non-SDR PTEs	69	85	9	9
Totals	**2,149**	**1,965**	**315**	**261**

International tertiary enrolments by qualification level

The tertiary Single Data Return (SDR) system operated by the Ministry of Education allows for detailed extraction of data on the enrolments of international students in funded public and private tertiary education providers, according to their qualification level. Table 13 presents the trend in international enrolments since 2005 (*note* – this data source is not directly comparable with the Export Education Levy information).

There have been some marked changes in demand from international students for the qualifications taught by tertiary education providers. From 2007 to 2012 there was a 53.8% increase in international enrolments in diploma courses. There has also been a consistent growth in international enrolments in postgraduate courses, rising 74.3% from 2006 to 2012. This increase can partly be attributed to the success of the 'domestic fees status for new international PhD students' policy which was introduced from 2006.

Table 13: International enrolments by qualification level	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	***% of total, 2012***
Certificate	8,691	9,173	10,038	10,786	10,379	10,882	10,023	*19.0%*
Diploma	10,470	8,941	9,038	11,271	12,276	13,752	13,754	*26.0%*
Bachelors	23,559	20,503	18,504	18,635	19,226	19,880	20,300	*38.4%*
Postgraduate	5,015	5,478	6,162	7,114	7,902	8,214	8,740	*16.5%*
Total enrolments	**47,735**	**44,095**	**43,742**	**47,806**	**49,783**	**52,728**	**52,817**	
Total students*	**42,709**	**39,824**	**39,522**	**43,116**	**45,294**	**47,771**	**47,668**	

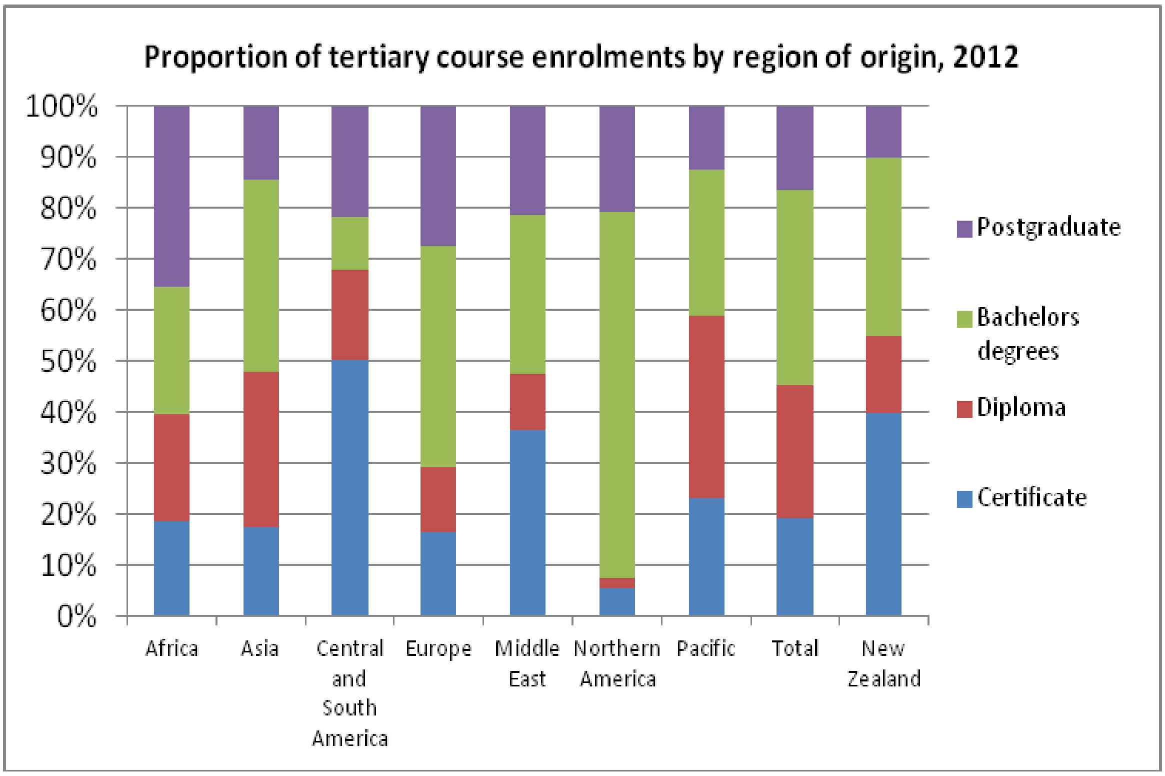
Notes: Postgraduate totals include Honours degrees & Postgraduate Diplomas; Masters; & Doctorates. Data is revised and may differ from previously published figures.
* Students who were enrolled at more than one qualification level have been counted in each level. Consequently, the sum of students in each level may not add up to the total.

Table 14 shows there were substantial variations in the profile of qualifications enrolments according to the regional origins of international students. In 2012 the great majority of international tertiary students came from Asia (73.9%), followed by Europe (7.2%) and the Middle East (5.9%). The largest proportion of Asia enrolments were in bachelors courses (37.7%), as were most North American enrolments (71.7%). European enrolments had the highest proportion of participation in postgraduate courses (27.7%).

A comparison with New Zealand tertiary enrolments during 2012 shows that, overall, international enrolments were rather more focused on bachelor studies (38.4% *vs* 35.2%), and had a substantially higher proportion of postgraduate enrolments (16.5% *vs* 10.1%). During 2012 the 47,668 international tertiary students made up 10.1% of all tertiary students enrolled with New Zealand's funded tertiary education providers.

Table 14: Tertiary enrolments by region & level, 2012	**Africa**	**Asia**	**Central & South America**	**Europe**	**Middle East**	**Northern America**	**Pacific**	***New Zealand***
Certificate	109	6,872	605	627	1,135	159	516	193,347
Diploma	124	11,749	214	472	334	56	805	72,640
Bachelors	147	14,726	127	1,636	964	2,060	640	171,165
Postgraduate	210	5,671	263	1,046	670	598	282	49,261
Total enrolments	**590**	**39,018**	**1,209**	**3,781**	**3,103**	**2,873**	**2,243**	**486,413**
Total students*	**554**	**34,956**	**1,128**	**3,577**	**2,611**	**2,824**	**2,018**	**422,453**
% of international enrolments	1.1%	73.9%	2.3%	7.2%	5.9%	5.4%	4.2%	

* Students who were enrolled at more than one qualification level have been counted in each level. Consequently, the sum of students in each level may not add up to the total.


Proportion of tertiary course enrolments by region of origin, 2012
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Africa
Asia
Central and South America
Europe
Middle East
Northern America
Pacific
Total
New Zealand
Postgraduate
Bachelors degrees
Diploma
Certificate

Appendix 1: Sources

The information in this memorandum is based on public data released by the Ministry of Education and the Ministry of Business, Innovation and Employment.

The Export Education Levy

The calendar year information on international fee-paying enrolments is recorded as part of the Export Education Levy (EEL), which has been administered by the Ministry of Education since January 2003. The EEL is paid by all providers which enrol international fee-paying students. Information on the national origins of enrolments has been collected from January 2006.

A limitation of the EEL data is that it only records enrolments of international fee-paying students, and so does not include students who have domestic fees status with New Zealand state education providers. This group includes exchange students, and international Doctor of Philosophy (PhD) students who enrolled from 19 April 2005.

The summary EEL data for the 2003 to 2012 calendar years is on the Education Counts website http://www.educationcounts.govt.nz/statistics/international_education

Tertiary enrolments

The Ministry's Single Data Return (SDR) information on international enrolments within public and private tertiary education organisations is for calendar years, and summarises those students enrolled at any time during the year in formal qualifications of more than a weeks duration at the 35 public tertiary educational institutions and the 263 private providers that received Ministry of Education funding, or that enrolled students in receipt of student loans or student allowances.

The statistics represent student numbers rather than enrolments, and include exchange, scholarship, and foreign fee-paying students. For more statistics on international students visit the Ministry's *Education Counts* website at http://www.educationcounts.govt.nz/statistics/tertiary_education

Immigration data

The Ministry of Business, Innovation and Employment (Immigration New Zealand) publishes monthly updates on the numbers of approved applications for student visas and permits (http://www.immigration.govt.nz/statistics). While this information source provides a timely update on the origins of *prospective* international students, the data is not able to be matched with the actual enrolments in different providers, as this information is not collected.

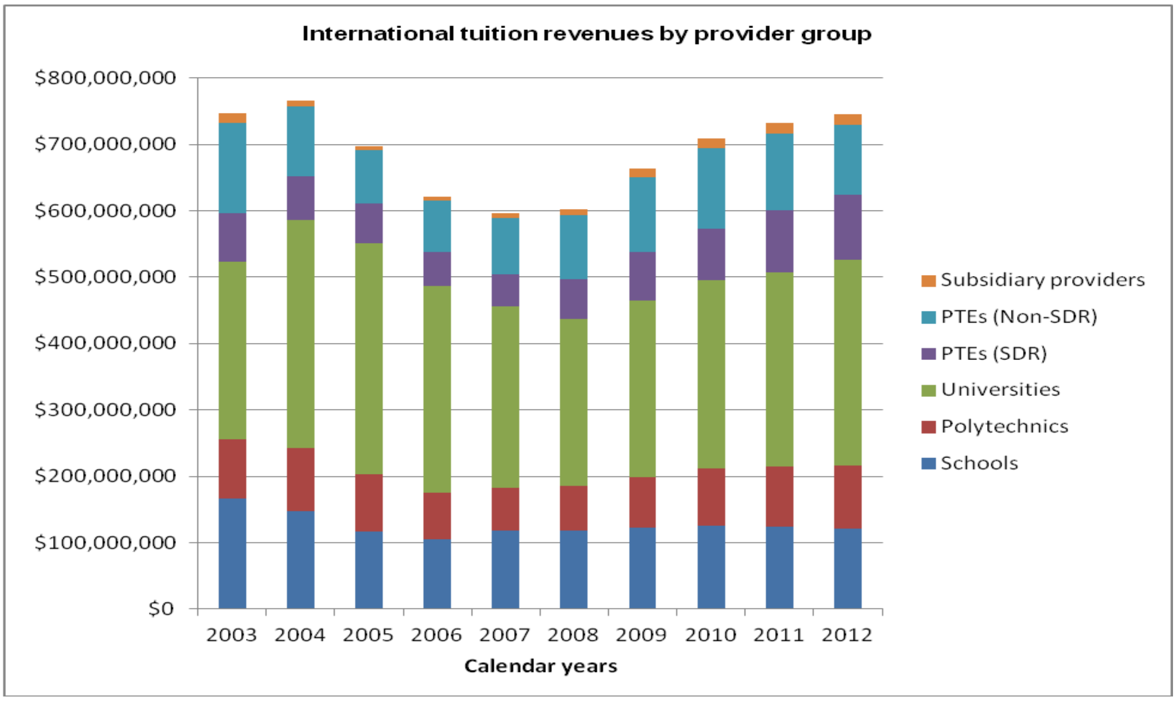
A point to be borne in mind when referring to student visa data is that it can understate total student numbers, as many students enrolled in short courses with English language providers are believed to be in New Zealand on visitor visas.

Appendix 2: Export Education Levy information

The Export Education Levy, administered by the Ministry of Education, allows for the collection of information on the tuition fee income received by providers from international fee-paying students. There was an overall peak of $772 million in 2004, reducing to $597 million in 2007, and then rising to $746 million in 2012. It is apparent that the eight universities have consistently reported the highest levels of tuition income from international students ($309 million in 2012), followed by private education providers ($204 million in 2012) and schools ($122 million).

Table 15:	**Tuition fee income, NZ$ million**	2006	2007	2008	2009	2010	2011	2012
Schools	Primary	$18.6	$22.5	$18.6	$16.9	$16.3	$13.9	$11.3
	Secondary	$85.8	$95.8	$100.1	$105.1	$108.8	$109.8	$110.4
	Sub-total	**$104.4**	**$118.3**	**$118.7**	**$122.1**	**$125.1**	**$123.7**	**$121.7**
Tertiary Education Institutions	Polytechnics	$70.1	$64.4	$67.1	$76.2	$86.1	$90.5	$94.9
	Colleges of Education*	$2.5	$0	$0	$0	$0	$0	$0
	Universities	$309.2	$273.7	$251.1	$267.0	$284.0	$292.7	$308.9
	Wānanga	$0	$0	$0	$0	$0	$0	$0
	Sub-total	**$381.8**	**$338.1**	**$318.2**	**$343.2**	**$370.1**	**$383.2**	**$403.8**
Private Providers	SDR PTEs	$51.3	$47.1	$59.3	$72.1	$77.0	$93.1	$99.2
	Non-SDR	$78.1	$84.9	$96.5	$112.6	$121.1	$115.5	$105.1
	Other	$0.1	$0.2	$0.1	$0.1	$0.1	$0	$0
	Sub-total	**$129.5**	**$132.2**	**$155.9**	**$184.8**	**$198.2**	**$208.6**	**$204.3**
	Subsidiary	$6.2	$8.2	$9.5	$14.0	$15.1	$16.8	$15.9
	Total Tuition	**$621.9**	**$596.8**	**$602.3**	**$664.1**	**$708.6**	**$732.3**	**$745.7**

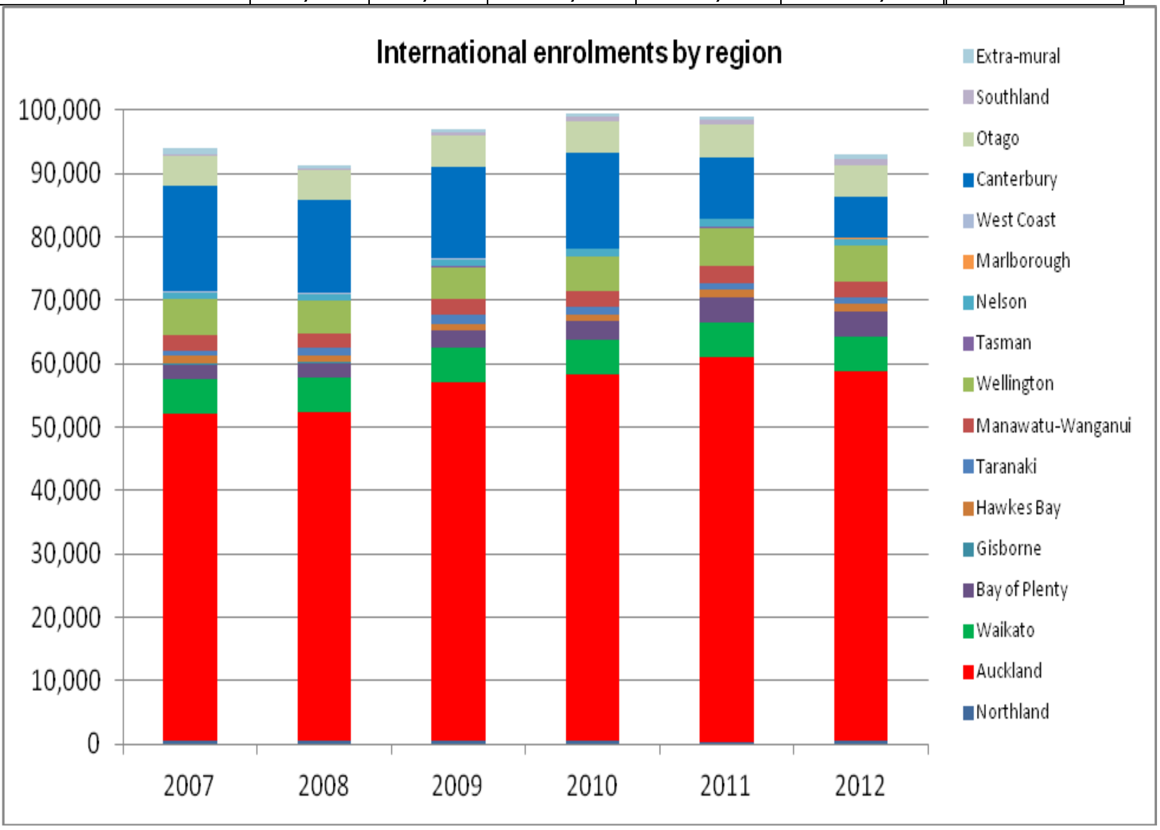
* The colleges of education were progressively amalgamated with the universities.



The distribution of international fee-paying students within New Zealand can also be determined from the Export Education Levy. Table 16 shows the regional breakdown

of student enrolments for the 2008 to 2012 period. The Auckland region is the primary location for international enrolments, with 62.6% in 2012. It is apparent that Canterbury recorded a 57.0% fall in international enrolments from 2010 to 2012, due to the consequences of the Christchurch earthquake of 22 February 2011.

Table 16: Distribution of International Fee-Paying Students	**2008**	**2009**	**2010**	**2011**	**2012**	*Proportion of total, 2012*
Northland	435	445	437	385	452	*0.5%*
Auckland	51,825	56,690	57,834	60,667	58,255	*62.6%*
Waikato	5,473	5,351	5,601	5,407	5,630	*6.1%*
Bay of Plenty	2,386	2,641	2,777	4,033	3,818	*4.1%*
Gisborne	63	56	33	29	36	*0.0%*
Hawkes Bay	1,074	993	1,050	1,194	1,271	*1.4%*
Taranaki	1,251	1,480	1,302	1,033	1,082	*1.2%*
Manawatu-Wanganui	2,268	2,460	2,383	2,602	2,477	*2.7%*
Wellington	5,087	5,153	5,385	6,009	5,504	*5.9%*
Tasman	145	134	162	144	167	*0.2%*
Nelson	984	1,026	1,070	1,238	999	*1.1%*
Marlborough	81	90	62	101	104	*0.1%*
West Coast	104	79	74	74	77	*0.1%*
Canterbury	14,754	14,487	15,201	9,573	6,545	*7.0%*
Otago	4,510	4,835	4,906	5,319	4,944	*5.3%*
Southland	338	449	612	750	864	*0.9%*
Extra-mural	610	527	557	372	772	*0.8%*
Totals	**91,388**	**96,896**	**99,446**	**98,930**	**92,995**	***100.0%***



Appendix 3: Economic benefit from international education

The economic contribution of the international education sector (i.e. international fee-paying students enrolled in New Zealand educational institutions) to the New Zealand economy has previously been calculated by Infometrics, based on data from the Export Education Levy[1]. The 2006 study estimated that the overall economic benefit – including tuition fees paid, living costs for students, and multiplier factors for the wider economy – amounted to $2.21 billion in 2004.

A further study was undertaken for the 2007/08 period, based on a statistically significant survey of international students and research with New Zealand education providers which are active in other countries. Table 17 summarises the key findings of these research projects, together with data from the Export Education Levy on the international fees revenue earned by providers.

It is notable that the international education sector has consistently produced an annual economic benefit to New Zealand of over $2 billion since 2004. The tuition fees revenue to providers, amounting to about $746 million in 2012, also means international education is one of New Zealand's top services export earners.

Table 17: Estimated economic value-add	Tuition fees revenue (Export Education Levy)	Estimated economic impact* (contribution to GDP)	Offshore education earnings
2004	$775 million	$2.21 billion	n.a.
2005	$699 million	n.a.	n.a.
2006	$623 million	n.a.	n.a.
2007/08	$597 million	$2.07 billion	$70 million
2009	$664 million	n.a.	n.a.
2010	$708 million	n.a.	n.a.
2011	$732 million	$2.23 billion	$109 million
2012	$746 million	To be advised	To be advised

* Calculated by Infometrics. Economic impact includes tuition fees, living expenditure by students, and multiplier factors for the wider economy.

Table 17 refers to the extent of offshore earnings by New Zealand education providers and consultancies which are known to be active in other countries. This is an expanding area of business which has significant potential for further growth, particularly in the Gulf States and South-East Asia. A number of New Zealand tertiary providers are becoming more active in establishing education joint ventures with providers in other countries (for example: Victoria University of Wellington has a small satellite campus in Ho Chi Minh City, Vietnam; and there is a major project by a consortium of New Zealand providers in developing the vocational training sector in Oman).

[1] "The Economic Impact of Foreign Fee-Paying Students" Infometrics, February 2006. This report can be downloaded from http://www.minedu.govt.nz/goto/international
"The Economic Impact of Export Education" Infometrics, NRB and SkinnerStrategic, 30 June 2008. "The Economic Impact of Export Education in 2011" Infometrics, April 2012
These reports can be downloaded from http://www.educationnz.govt.nz