



MINISTRY OF EDUCATION

Te Tākaka o te Mātauranga

INTERNATIONAL STUDENT ENROLMENTS IN NEW ZEALAND

2001 – 2007

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International Division
Ministry of Education

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Introduction

This report summarises the publicly available data, from four main sources, on enrolments of international students within New Zealand education provider sectors from 2001 to 2007. Summary information is also stated on the numbers of approved student visas and permits for the calendar years 2001 to 2007.

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

Sources

The information in this memorandum is based on public data released by the Ministry of Education, Statistics New Zealand, and the Immigration Service of the Department of Labour.

School enrolments

The Ministry's data on international enrolments within schools is stated as at 1 July from 2001 to 2005, and is from the roll returns summaries listed on the *Education Counts* website (<http://educationcounts.edcentre.govt.nz>).

Tertiary enrolments

The Ministry's data on international enrolments within public and private tertiary education organisations is for the years 2001 to 2005, 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://educationcounts.edcentre.govt.nz/statistics/tertiary/index.html>

English Language Provider enrolments

The information on enrolments within English language providers (ELP) is from the annual Statistics New Zealand Survey of English Language Providers, for the financial years ended 31 March 2001 to 31 March 2006 (<http://www.stats.govt.nz>). As a convention to aggregate the data sources used in the tables in this report, the English Language Provider data from Statistics New Zealand is stated as covering the *previous* calendar year, i.e. the ELP data for the year ended 31 March 2006 is included in the '2005' period.

Immigration data

The Immigration Service of the Department of Labour web-publishes monthly updates on the numbers of approved applications for student visas and permits (<http://www.immigration.govt.nz/migrant/general/generalinformation/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 by the Department of Labour.

A point to be borne in mind when referring to student visa and permit data is that it can understate total student numbers, as many enrollees in English Language Providers are believed to be in New Zealand on visitor visas.

The Export Education Levy

The periods used for 2001 – 2005 are not directly comparable with the calendar year information recorded for the Export Education Levy ('the Levy'), which has been administered by the Ministry of Education since January 2003. This Levy is paid by all providers which enrol foreign fee-paying students. Information on the national origins of enrolments has been collected from January 2006.

A limitation of the Levy 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, French and German post-graduate students, and international Doctor of Philosophy (PhD) students who enrolled from 19 April 2005.

The summary Levy data for the 2003 to 2007 calendar years is stated on the websites of the Ministry of Education, and of the Education NZ Trust (www.educationnz.org.nz/policy/statistics).

Summary

The total enrolments of international students across all provider groups rose by 61 percent from 2001 to 2002, from 79,030 to 126,919. From the market peak in 2002 there has been a 28 percent decline to 90,934 enrolments in 2006. This decline mainly affected the schools and private training establishments. From 2005 a reduction in total enrolments within the state tertiary education sector¹ was also recorded.

A graphical representation of this data is shown in Chart 1. It is apparent that the greatest increase in enrolments occurred within the English language provider sector, followed by the tertiary education institutions. While the decline since the 2002 peak is clearly evident, the 2007 level is still about 15 percent above the total recorded for 2001.

¹ The tertiary education sector includes the publicly-funded institutions of the universities, institutes of technology/polytechnics, wananga, and teachers colleges; and the private training establishments (PTEs) that receive government funding for their students.

Table 1: International enrolments by provider groups	2001	2002	2003	2004	2005	2006	2007
Schools.	10,555	15,259	17,448	14,477	11,984	13,933	15,207
Public Tertiary Education Institutions.	20,405	30,714	39,009	43,047	40,706	35,261	31,143
Private Training Establishments.	6,345	9,443	10,475	9,876	5,807	44,662	44,584
English Language Providers.	41,725	71,503	50,689	43,417	35,749
Totals	79,030	126,919	117,621	110,817	94,246	93,856	90,934

Sources:

2001 – 2005:

Schools data is as at 1 July (Ministry of Education roll returns).

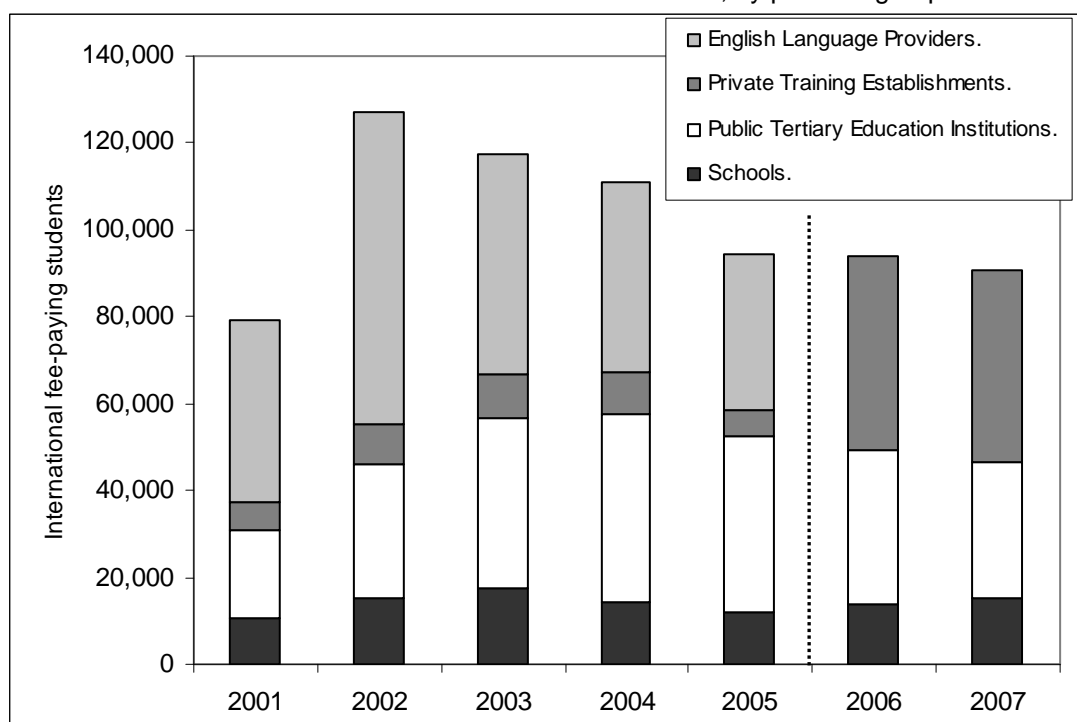
Tertiary data, for public and private providers, is for full calendar years 2001 to 2005 (Ministry of Education Single Data Return database).

English language provider data is for the financial years ended 31 March 2002 to 2006 (Statistics New Zealand Survey of English Language Providers).

2006 – 2007:

Export Education Levy database for the full calendar year for schools, state tertiary providers, and private training establishments (described as ‘SDR’ and ‘non-SDR’ private providers). The latter category *includes* English language providers.

Chart 1: Enrolments of international students in New Zealand, by provider groups



International enrolments by origin

The information on enrolments can be disaggregated by the reported origins of the students, as shown in Table 2 and Chart 2. The overall growth in the sector from 2001 to 2002 was clearly driven by a rapid increase in enrolments of students from the People’s Republic of China (‘China’), rising 118 percent from 25,182 to 53,340 enrolments. Since the peak in 2002 there has been a 54 percent decline in Chinese enrolments, to 24,776 in 2007.

There was also a marked increase in enrolments of students from South Korea, rising 55 percent from 12,802 in 2001 to 19,881 in 2002. Since the decline recorded from 2003 to 2005 there has been a recovery in enrolments from South Korea, rising to 17,503 in 2007.

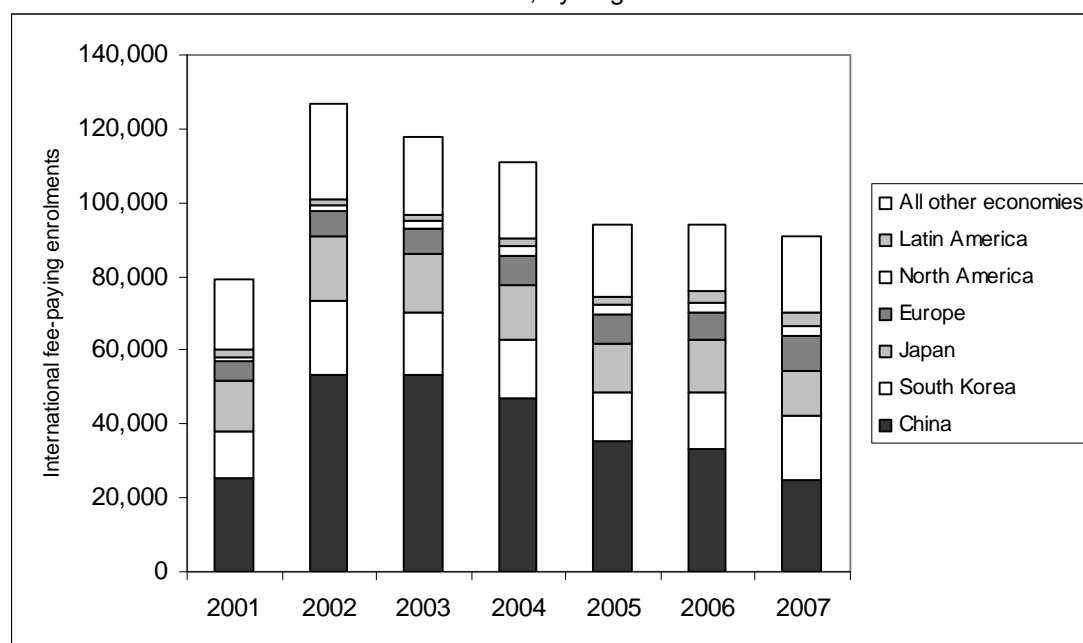
Table 2: International enrolments by origin	2001	2002	2003	2004	2005	2006	2007
China	25,182	53,340	53,175	46,800	35,482	33,054*	24,776*
South Korea	12,802	19,881	17,300	15,814	13,275	15,719	17,503
Japan	13,947	17,844	15,532	14,917	12,847	13,932	12,236
Europe	5,171	6,546	6,988	7,973	7,923	7,365	9,472
North America	1,259	1,652	2,247	2,833	3,113	2,733	2,730
Latin America	1,842	1,769	1,535	1,794	2,087	3,204	3,526
All other economies	18,827	25,887	20,844	20,686	19,519	17,849	20,691
Totals	79,030	126,919	117,621	110,817	94,246	93,856	90,934

* including the Hong Kong Special Administrative Region

The reasons for the initial rapid growth in enrolments from China include New Zealand's relatively open immigration system at the time, compared to the other 'main English-speaking education destination countries'; a heightened interest by Chinese students in gaining Western tertiary qualifications; and perceptions of New Zealand as being a relatively safe and low-cost country in which to study, due partly to the lower value of the New Zealand dollar.

The decline in Chinese interest since 2002 – 2003 has usually been ascribed to factors including negative publicity, due partly to the high-profile failure of a number of private education providers in New Zealand; much greater competition from other countries for Chinese students (notably from universities in Australia, Great Britain, and Canada); a greatly increased provision of tertiary education opportunities in China; and the rising value of the New Zealand dollar².

Chart 2: Enrolments of international students, by origin



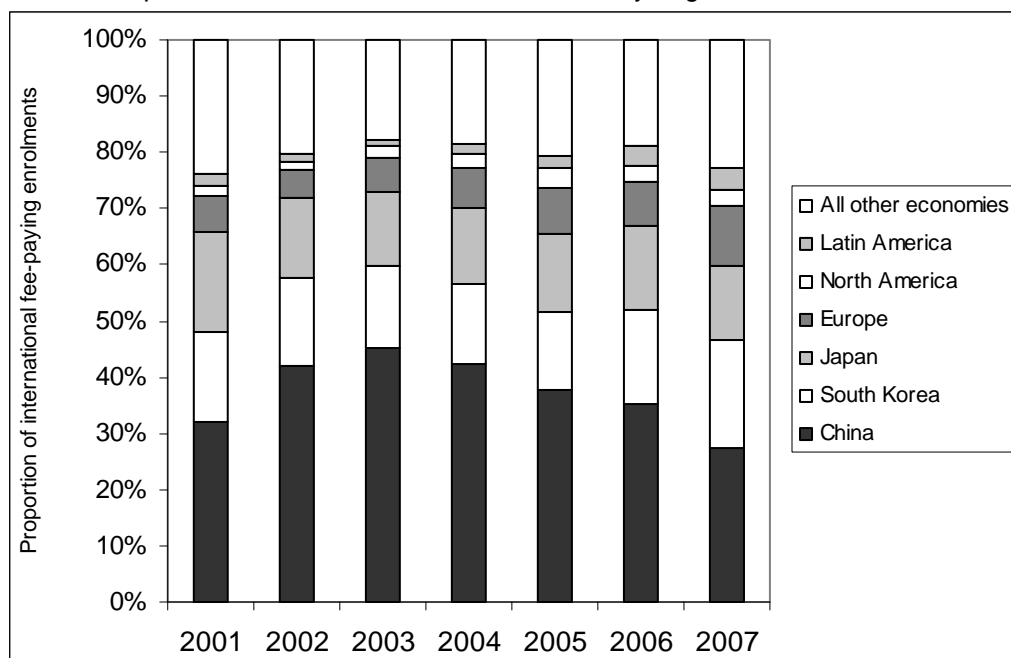
² At its lowest point in November 2000, 1 \$NZ was worth 0.40 \$US; by November 2004 the value of the \$NZ had risen 75 percent to 0.70 \$US (source: Reserve Bank of New Zealand).

The overall rise in enrolments of South Korean students since 2001 is believed to be based on a need to learn English, due to the requirements of the Korean examination system and employment within key *chaebol* exporting companies.

While there has, since 2002, been a decline in the level of enrolments from China, there has been overall growth recorded from the relatively smaller source regions of Europe, North America, and Latin America. European enrolments have risen 83 percent from 2001 to 2007, and North American enrolments rose by 168 percent over the same period.

Chart 3 states the proportions of total international enrolments by student origins. In 2001 the ‘top three’ (China, Japan and South Korea) made up 66 percent of all enrolments. This rose to a peak of 73 percent in 2003, and has since reduced to 60 percent for 2007.

Chart 3: Proportion of total international enrolments, by origin



Student visas and permits

The Immigration Service of the Department of Labour collates information on the numbers of approved (and non-approved) applications for student visas and student permits³. This information for the top seven source countries is summarised in Table 3, on a calendar year basis.

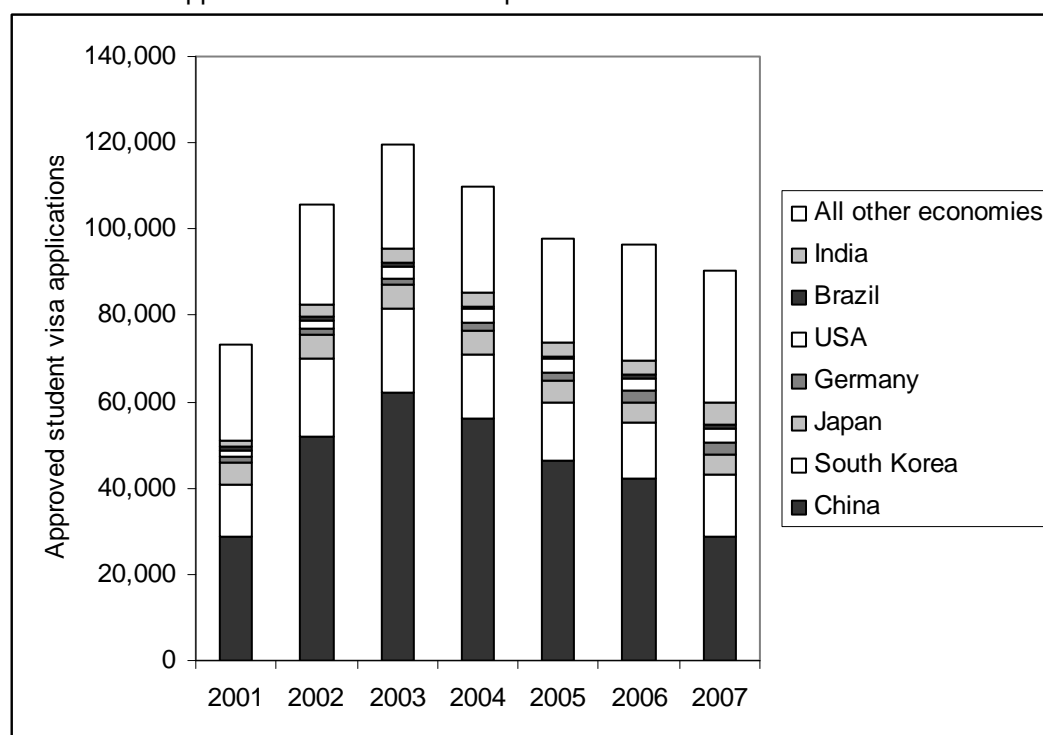
The growth in the numbers of student visas and permits from 2001 to 2003 was driven by a rapid increase in approvals for Chinese citizens, rising 116 percent from 28,607 to 61,935 approved visas and permits.

³ Student *visas* are applied for by people resident in other countries. Student *permits* are usually applied for by people who have already arrived in New Zealand, for example on tourist visas, and who wish to stay longer and study.

Since the peak in 2003 there has been a 53 percent decline in total approvals for Chinese students, to 28,887 in 2007. There was also a marked increase in student visa and permit approvals for South Korean students, rising 61 percent from 12,132 in 2001 to 19,513 in 2003.

Table 3: Approved student visas & permits, by origin	2001	2002	2003	2004	2005	2006	2007
China	28,607	51,919	61,935	55,941	46,220	42,010	28,887
South Korea	12,132	17,998	19,513	15,208	13,596	12,971	14,441
Japan	5,242	5,508	5,525	5,186	4,858	4,685	4,326
Germany	1,132	1,408	1,792	2,102	2,306	2,721	2,910
USA	1,442	1,973	2,603	3,033	3,050	2,913	3,044
Brazil	938	1,007	781	663	612	783	1,069
India	1,698	2,738	3,243	3,013	2,955	3,458	5,080
All other economies	21,994	23,172	24,222	24,924	24,171	26,664	30,590
Totals	73,185	105,723	119,614	110,070	97,768	96,205	90,347

Chart 4: Total approved student visas and permits



A comparison with the enrolment figures shows that there is usually a close match with the total approved student visas and permits in each calendar year. The notable exception is that the visas granted to people from Japan are much lower than their enrolments. This is because many Japanese students enrolled in short courses with English language providers are understood to be in New Zealand on visitor visas.

North Asia

The great majority of international enrolments in New Zealand come from the three main North Asian countries of China, Japan, and South Korea. These three countries provided 60 percent of all enrolments in 2007. There are also a significant number of students from Taiwan.

Table 4: North Asia student enrolments	<i>China*</i>		<i>Japan</i>		<i>South Korea</i>		<i>Taiwan</i>	
	2006	2007	2006	2007	2006	2007	2006	2007
Schools.	2,034	2,106	2,000	1,789	6,507	6,579	394	356
Public Tertiary Education Institutions.	18,749	13,262	1,989	2,020	2,007	2,118	529	526
Private Training Establishments.	12,271	9,408	9,944	8,427	6,553	8,806	1,810	1,942
Totals	33,054	24,776	13,934	12,236	15,067	17,503	2,733	2,824

* including the Hong Kong Special Administrative Region

The spread of Chinese students across provider groups is concentrated within the public tertiary education institutions, though a decline is evident in this sector due to a marked fall in new enrolments of Chinese students, who are consequently not replacing the flow of graduates⁴.

It is apparent that most Japanese students enrolled within private training establishments (69 percent in 2007), as did students from Taiwan. South Korean students were concentrated in the schools, and private training establishment sectors.

South-East Asia

The following table shows a sectoral breakdown for the four largest South-East Asia source countries for international students. There were increases in student enrolments recorded from Thailand, Malaysia and Vietnam from 2006 to 2007. There are wide variations in the enrolment patterns of students. Malaysian students were mainly enrolled in public tertiary education institutions, whereas Thai students were predominantly enrolled with private training establishments. Vietnamese student enrolments are more broadly spread across the provider groups.

Table 5: South-East Asia student enrolments	<i>Thailand</i>		<i>Malaysia</i>		<i>Vietnam</i>		<i>Indonesia</i>	
	2006	2007	2006	2007	2006	2007	2006	2007
Schools.	887	793	118	83	199	222	52	51
Public Tertiary Education Institutions.	525	485	1,404	1,658	541	539	311	281
Private Training Establishments.	1,483	1,691	164	190	244	271	401	152
Totals	2,895	2,969	1,686	1,931	984	1,032	764	484

⁴ A useful guide to the decline in new enrolments of Chinese students is the number of *first-time* approved student visas and permits. At the time of the peak in the 2001/02 financial year a total of 19,667 first-time visas were issued to Chinese students; this declined to 2,478 in 2005/06.

South Asia

There has been a rapid growth in enrolments of students from India from 2006 to 2007, particularly within the public tertiary education institutions.

Table 6: South-Asia student enrolments	<i>India</i>		<i>Pakistan</i>		<i>Bangladesh</i>		<i>Sri Lanka</i>	
	2006	2007	2006	2007	2006	2007	2006	2007
Schools.	59	73	10	6	1	1	12	10
Public Tertiary Education Institutions.	1,427	1,948	46	66	43	35	110	96
Private Training Establishments.	1,080	1,715	39	38	18	19	21	17
Totals	2,566	3,736	95	110	62	55	143	123

It is notable that the 46 percent increase in enrolments of Indian students in 2007 is consistent with the increase in approved student visas and permits granted to Indian nationals, as shown in Table 3. There were a total of 5,080 approved applications recorded for 2007, a 47 percent increase from the level recorded for 2006.

The Middle East

Students from the Middle East studying in New Zealand are mainly from Saudi Arabia, and these students have predominantly enrolled in private training establishments (78 percent in 2007). Recent activities by the international education sector have focused on attracting state-funded scholarship students to New Zealand universities.

Table 7: Middle East student enrolments	<i>Saudi Arabia</i>		<i>Oman</i>		<i>United Arab Emirates, Kuwait, Qatar & Bahrain</i>		<i>Turkey & Iran</i>	
	2006	2007	2006	2007	2006	2007	2006	2007
Schools.	43	92	14	13	8	39	4	12
Public Tertiary Education Institutions.	257	496	140	155	41	105	54	59
Private Training Establishments.	1,482	2,076	95	121	33	117	49	73
Totals	1,782	2,664	249	289	82	261	107	144

Europe

Enrolments of European students are concentrated within private training establishments and the public tertiary education institutions. Enrolment information for the top four European source countries is stated in Table 8. In 2007 there were marked increases in German enrolments in schools, and in French enrolments with private training establishments.

Table 8: European student enrolments	<i>Germany</i>		<i>France</i>		<i>Switzerland</i>		<i>Russia</i>	
	2006	2007	2006	2007	2006	2007	2006	2007
Schools.	644	1,460	19	52	25	29	68	91
Public Tertiary Education Institutions.	473	482	83	141	47	39	265	281
Private Training Establishments.	1,025	954	290	1,110	1,448	1,481	563	575
Totals	2,142	2,896	392	1,303	1,520	1,549	896	947

North America

Enrolments of students from North America (overwhelmingly the United States of America) were predominantly within the public tertiary education institutions. There was a slight fall in enrolments of students in the tertiary institutions in 2007. This may be linked to a possible impact on student demand due to the increased value of the New Zealand dollar, relative to the United States dollar.

Table 9: North America student enrolments	<i>United States of America</i>		<i>Canada</i>	
	2006	2007	2006	2007
Schools.	46	86	9	16
Public Tertiary Education Institutions.	2,122	2,106	333	273
Private Training Establishments.	149	151	74	98
Totals	2,317	2,343	416	387

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 are stated in Table 10.

Table 10: Latin America student enrolments	<i>Brazil</i>		<i>Chile</i>		<i>Argentina</i>		<i>Colombia</i>	
	2006	2007	2006	2007	2006	2007	2006	2007
Schools.	143	291	13	49	0	10	4	7
Public Tertiary Education Institutions.	110	104	80	96	29	25	19	27
Private Training Establishments.	1,859	2,022	362	309	158	210	106	173
Totals	2,114	2,417	455	454	187	245	129	207

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 public and private tertiary education providers, according to their qualification level. Table 11 presents the trend in international enrolments since 2001 (*note* – due to classification differences, this data is not directly comparable with the Export Education Levy information stated in the Appendices).

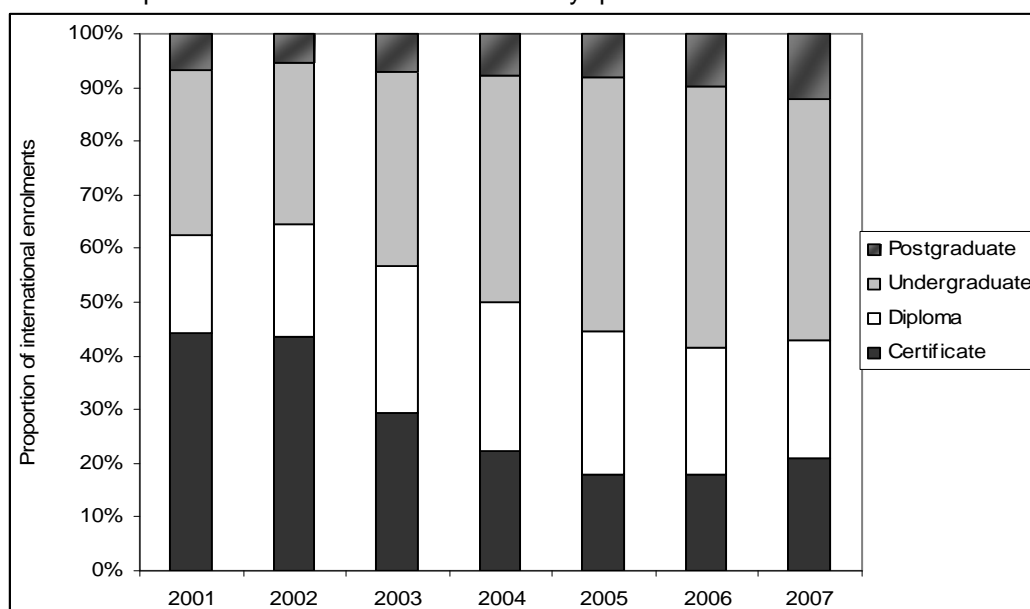
It is apparent that growth in international tertiary enrolments from 2001 to 2002 was driven by a 53 percent increase in certificate enrolments; subsequently, growth until 2004 was based on a 203 percent increase in diploma and a 169 percent increase in undergraduate enrolments. Since the peak in 2002 there has been a 54 percent decline in certificate enrolments, and (since 2004) a 40 percent fall in diploma enrolments.

Table 11: International enrolments by qualification level	2001	2002	2003	2004	2005	2006	2007	% of total, 2007
Certificate	12,618	19,326	15,330	12,541	9,183	8,190	8,858	21%
Diploma	5,119	9,356	14,425	15,539	13,704	10,736	9,344	22%
Undergraduate	8,726	13,342	18,972	23,525	24,354	22,139	19,138	45%
Postgraduate	1,940	2,480	3,631	4,368	4,242	4,437	5,154	12%
<i>Total enrolments</i>	<i>28,403</i>	<i>44,504</i>	<i>52,358</i>	<i>55,973</i>	<i>51,483</i>	<i>45,502</i>	<i>42,494</i>	<i>100%</i>
Total students*	26,236	40,824	47,115	50,441	47,365	42,651	39,942	

Postgraduate totals include Honours degrees & Postgraduate Diplomas; Masters; and Doctorates.

* Students who were enrolled at more than one qualification level have been counted in each level. Consequently, the sum of students is *less* than the sum of course enrolments.

Chart 5: Proportion of international enrolments by qualification level



International postgraduate studies have slowly risen over time as a proportion of all international tertiary enrolments, at 9 percent in 2000 and just over 12 percent in 2007. There was a marked increase in international doctorate (PhD) enrolments from

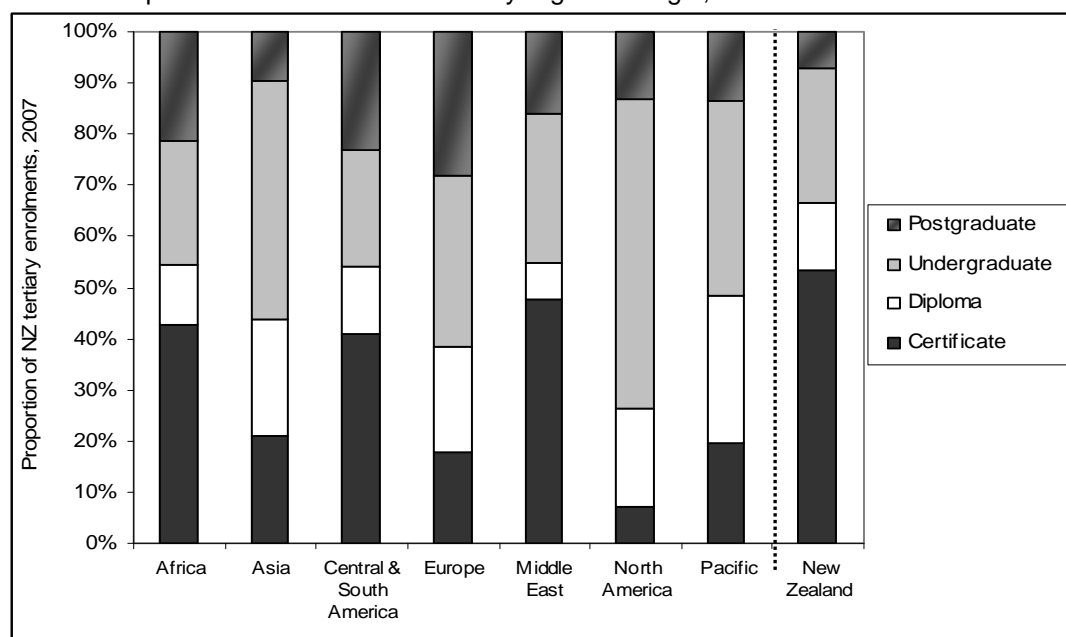
2005 to 2007 (rising from 693 to 1,522 students), however this was partly balanced by a reduction in international Masters enrolments from 2,082 to 1,762. As noted earlier, the increase in PhD studies can largely be attributed to the ‘domestic fees status for new international PhD students’ policy introduced from 2006.

Table 12 shows there were substantial variations in the profile of qualifications enrolments according to the regional origins of international students. In 2007 the great majority of international tertiary students came from Asia (73 percent), followed by Europe (10 percent) and North America (7 percent). Most Asian enrolments were in undergraduate courses (47 percent), as were most North American enrolments (61 percent). European enrolments had the highest proportion of participation in postgraduate courses (28 percent).

A comparison with New Zealand tertiary enrolments in 2007 shows that, overall, international enrolments were much more focused on undergraduate studies (45 percent vs 26 percent), and had a substantially higher proportion of postgraduate enrolments (12 percent vs 7 percent). International tertiary students made up just over 8 percent of all tertiary students in New Zealand during 2007.

Table 12: Tertiary enrolments by region & level, 2007	Africa	Asia	Central & South America	Europe	Middle East	North America	Pacific	New Zealand
Certificate	224	6,613	249	722	404	210	388	257,217
Diploma	62	7,134	78	840	60	575	579	62,748
Undergraduate	128	14,680	138	1,360	246	1,819	764	128,076
Postgraduate	112	2,962	141	1,140	137	394	267	33,915
<i>Total enrolments</i>	<i>526</i>	<i>31,389</i>	<i>606</i>	<i>4,062</i>	<i>847</i>	<i>2,998</i>	<i>1,998</i>	<i>481,956</i>
Total students	499	29,262	568	3,873	784	2,974	1,918	443,801
% of students	1%	73%	1%	10%	2%	7%	5%	

Chart 6: Proportion of course enrolments by region of origin, 2007



Appendix 1: Export Education Levy information

Data from the Export Education Levy, administered by the Ministry of Education since January 2003, shows a trend which is consistent with the enrolment information from the other sources stated in this paper. From 121,167 international fee-paying students recorded in 2003, there was a 25 percent decline to 90,934 in 2007.

Table 13: International Fee-Paying Student Enrolments		2003	2004	2005	2006	2007
Schools	Primary	5,380	4,792	3,471	3,611	3,527
	Secondary	15,558	13,530	10,974	10,322	11,680
	Sub-total	20,938	18,322	14,445	13,933	15,207
Tertiary Education Institutions	Polytechnics	12,483	12,599	11,965	10,721	10,007
	Colleges of Education*	424	726	389	262	0
	Universities	24,498	28,195	27,251	24,278	21,136
	Wananga	2	8	8	0	0
	Sub-total	37,407	41,528	39,613	35,261	31,143
Private Providers	SDR Providers	7,334	7,682	8,895	6,515	6,114
	Non-SDR Providers	51,072	42,643	33,470	35,711	35,853
	Sub-total	58,406	50,325	42,365	42,226	41,967
Other Providers	Other Tertiary Education Providers (OTEPs)	29	12	20	19	31
	Subsidiary Providers**	4,387	2,488	1,823	2,417	2,586
	Totals	121,167	112,675	98,266	93,856	90,934

* 'Colleges of Education' have now been merged with the respective universities.

** 'Subsidiary providers' are mainly the English-language foundation skills units run by the universities; in earlier tables, these numbers are added to the 'private training establishments' figures.

Information on the tuition fee income received by providers from international fee-paying students also shows a declining trend. Total tuition income fell from a peak of \$775.3 million in 2004, to \$597.2 million in 2007. The reason tuition income rose in 2004, despite the fall in student numbers from 2003, is because more students were enrolled in university courses which charge higher fees.

Table 14: Tuition fee income to providers, \$ million (excl GST)		2003	2004	2005	2006	2007
Schools	Primary	\$31.7	\$29.5	\$21.2	\$18.9	\$22.6
	Secondary	\$135.1	\$125.1	\$96.0	\$87.1	\$95.7
	Sub-total	\$166.8	\$154.6	\$117.3	\$106.0	\$118.2
Tertiary Education Institutions	Polytechnics	\$89.2	\$94.7	\$85.9	\$70.1	\$64.4
	Colleges of Education	\$3.4	\$4.5	\$4.1	\$2.5	\$0
	Universities	\$263.5	\$339.4	\$344.1	\$309.2	\$273.7
	Wananga	n/a	\$0	\$0	\$0	\$0
	Sub-total	\$356.1	\$438.8	\$434.2	\$381.8	\$338.1
Private Providers	SDR providers	\$72.9	\$65.0	\$60.4	\$51.2	\$47.1
	Non-SDR providers	\$132.4	\$107.9	\$79.9	\$77.6	\$85.3
Other Providers	OTEPs	\$0.6	\$0.1	\$0.1	\$0.1	\$0.2
	Subsidiary Providers	\$14.7	\$8.8	\$6.5	\$6.2	\$8.2
	Total Tuition Fees Paid	\$743.0	\$775.3	\$698.5	\$623.0	\$597.2

Note: Totals may not add due to rounding

The distribution of foreign fee-paying students within New Zealand can also be determined from the Export Education Levy. Table 15 shows the regional breakdown of student enrolments for the 2004 to 2007 period. It is apparent that, in 2007, over half of international students enrolled with providers located in Auckland (54 percent), followed by Canterbury (18 percent), Waikato and Wellington (6 percent) and Otago (5 percent).

Almost all regions had a decline in international fee-paying enrolments from 2004 to 2007. Of the main regions with substantial numbers of students, Wellington reported the largest fall (by 45 percent), followed by Southland (39 percent) and Waikato (32 percent).

Table 15: Distribution of International Fee-Paying Students	2004	2005	2006	2007	<i>Proportion of total, 2007</i>	<i>Percentage change, 2004 - 2007</i>
Northland	563	424	395	514	1%	-9%
Auckland	57,884	50,901	49,833	49,293	54%	-15%
Waikato	8,146	6,897	6,335	5,502	6%	-32%
Bay of Plenty	2,345	2,432	2,124	2,323	3%	-1%
Gisborne	191	158	160	135	0%	-29%
Hawkes Bay	1,155	1,130	1,090	1,145	1%	-1%
Taranaki	921	1,081	989	873	1%	-5%
Manawatu-Wanganui	3,210	3,124	2,598	2,400	3%	-25%
Wellington	9,539	7,975	6,157	5,219	6%	-45%
Tasman	114	88	108	133	0%	17%
Nelson	949	911	802	944	1%	-1%
West Coast	54	46	81	210	0%	289%
Canterbury	21,382	17,497	17,816	16,759	18%	-22%
Otago	5,451	4,941	4,597	4,680	5%	-14%
Southland	292	283	318	179	0%	-39%
<i>extramural</i>	358	272	371	541	1%	51%
Totals	112,675	98,266	93,856	90,934	100%	-19%

Appendix 2: Economic benefit from international education

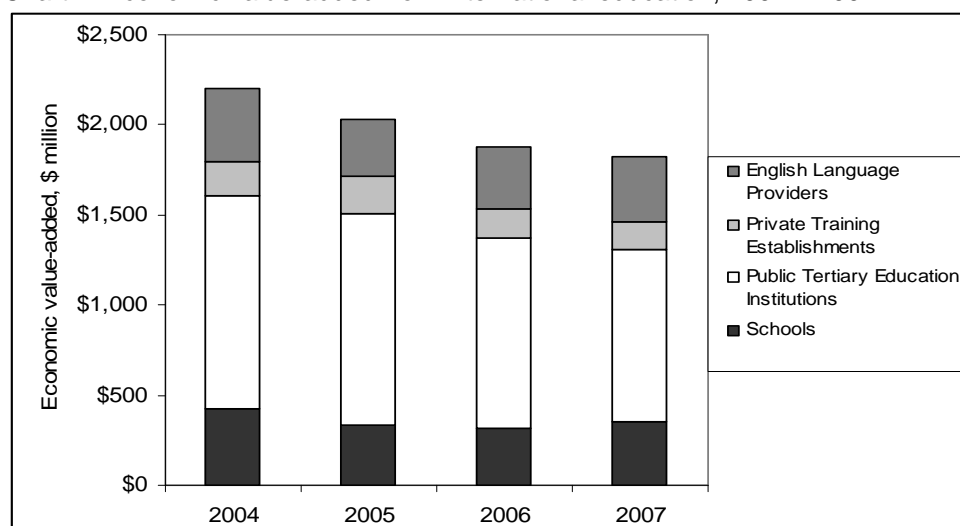
The economic contribution of the international education sector (i.e. foreign fee-paying students enrolled in New Zealand educational institutions) to the New Zealand economy has previously been calculated by Infometrics, based on 2004 data from the Export Education Levy⁵. This study estimated that the 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.

The following table presents an update of the estimated economic value-added (EVA) from international education, based on the Infometrics methodology, and using 2005 to 2007 data from the Export Education Levy. Allowances have also been made for a rise in living costs based on Consumer Price Index rates for 2005, 2006 and 2007.

Table 16: Estimated economic value-added		Schools	Public Tertiary Education Institutions	Private Training Establishments	English Language Providers	Totals
Students – 2004	No.	18,322	41,540	7,681	45,129	112,672
<i>Economic impact</i>	<i>\$m</i>	420	1,194	187	408	2,210
Students – 2005	No.	14,445	39,613	8,895	35,293	98,246
<i>Economic impact</i>	<i>\$m</i>	333	1,174	204	323	2,034
Students – 2006	No.	13,933	35,261	6,534	38,128	93,856
<i>Economic impact</i>	<i>\$m</i>	316	1,060	161	343	1,880
Students – 2007	No.	15,207	31,143	6,145	38,439	90,934
<i>Economic impact</i>	<i>\$m</i>	354	955	153	364	1,826

It is apparent there has been a fall in EVA from \$2.21 billion in 2004, to an estimated \$1.82 billion in 2007. The distribution of the economic benefit is shown in Chart 7.

Chart 7: Economic value-added from international education, 2004 – 2007



⁵ “The Economic Impact of Foreign Fee-Paying Students” Infometrics, February 2006. This report can be downloaded from <http://www.minedu.govt.nz/goto/international>