



MINISTRY OF EDUCATION

Te Tāhuhu o te Mātauranga

INTERNATIONAL ENROLMENTS IN NEW ZEALAND

2000 – 2006

20 April 2007

International Division
Ministry of Education

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Introduction

This report summarises the publicly available data, from four main sources, on the actual enrolments of international students within New Zealand provider groups from 2000 to 2006. Summary information is also stated on the numbers of approved student visas and permits for the calendar years 2000 to 2006.

This information is disaggregated by origin, according to the key markets of China, Japan, and South Korea, the regions of South-East Asia, the Middle East, Europe and North America, and the developing markets of Latin America and India. 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. This information is disaggregated by the reported origins of international students.

School enrolments

The Ministry's data on international enrolments within schools is stated as at 1 July from 2000 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 2000 to 2006, 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 School enrolments

The information on enrolments within English language schools (ELS) is from the annual Statistics New Zealand Survey of English Language Providers, for the financial years ended 31 March 2000 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 Schools data from Statistics New Zealand is stated as covering the *previous* calendar year, i.e. the ELS 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 Schools are believed to be in New Zealand on visitor visas.

The Export Education Levy

The periods used for 2000 – 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 only been able to be collected from January 2006.

A limitation of the Levy data is that it only records enrolments of foreign fee-paying students, and so does not include international exchange students (in schools or universities), or students who have domestic status in New Zealand state education providers. This group includes 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 2006 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 153 percent from 2000 to 2002, from 50,026 to 126,919. From the market peak in 2002 there has been a 26 percent decline to 93,421 enrolments in 2006. This decline has mainly affected the schools, private tertiary education organisations, and English language schools. In 2005 and 2006 a reduction in total enrolments within the public tertiary education institutions 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 schools sector, followed by the public tertiary education institutions. While the decline since the 2002 peak is clearly evident, the 2006 level is still about 18 percent above the total recorded for 2001.

Table 1: International enrolments by provider groups	2000	2001	2002	2003	2004	2005	2006
Schools.	7,191	10,555	15,259	17,448	14,477	11,984	13,933
Public Tertiary Education Institutions.	13,326	20,405	30,714	39,009	43,047	40,706	35,261
Private Tertiary Education Organisations.	3,306	6,345	9,443	10,475	9,876	5,807	6,534
English Language Schools.	26,203	41,725	71,503	50,689	43,417	35,749	37,693
Totals	50,026	79,030	126,919	117,621	110,817	94,246	93,421

Sources:

2000 – 2005:

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

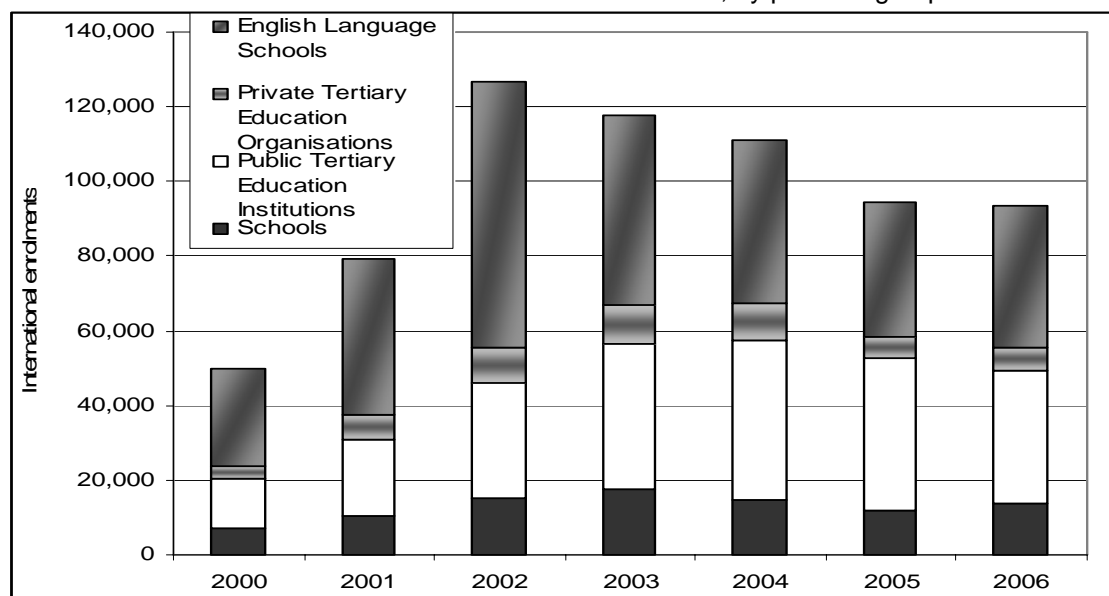
Tertiary data, for public and private providers, is for full calendar years 2000 to 2005 (Ministry of Education Single Data Return database).

English language schools data is for the financial years ended 31 March 2001 to 2006 (Statistics New Zealand Survey of English Language Providers).

2006:

Export Education Levy database *for the full calendar year*. This database records information for schools, tertiary education institutions, and private providers (described as ‘private training establishments’ – PTEs) according to their classification as ‘SDR’ and ‘non-SDR’ PTEs. ‘SDR’ PTEs enrol domestic students who receive state funding support, and so have to participate in the Single Data Return monitoring system.

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 2000 to 2002 was clearly driven by a rapid increase in enrolments of students from the People’s Republic of China (‘China’), rising 389 percent from 10,906 to 53,340 enrolments. Since the peak in 2002 there has been a 40 percent decline in Chinese enrolments to 31,905 in 2006.

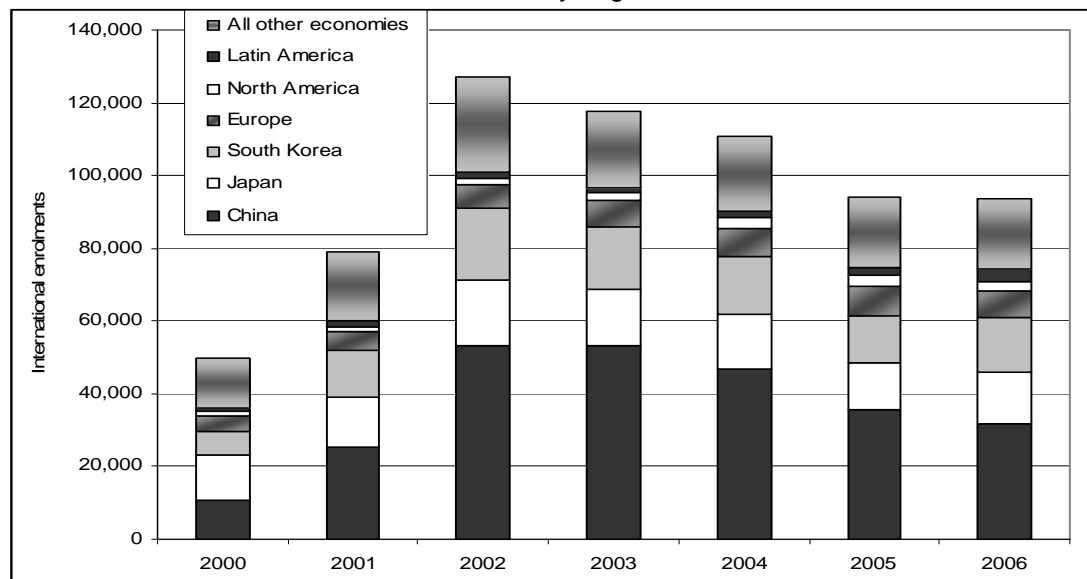
There was also a marked increase in enrolments of students from South Korea, rising 203 percent from 6,554 in 2000 to 19,881 in 2002. There has subsequently been an overall 24 percent fall in enrolments from South Korea, reducing to 15,067 in 2006.

Table 2: International enrolments by origin	2000	2001	2002	2003	2004	2005	2006
China	10,906	25,182	53,340	53,175	46,800	35,482	31,905
Japan	12,139	13,947	17,844	15,532	14,917	12,847	13,934
South Korea	6,554	12,802	19,881	17,300	15,814	13,275	15,067
Europe	4,539	5,171	6,546	6,988	7,973	7,923	7,365
North America	897	1,259	1,652	2,247	2,833	3,113	2,733
Latin America	963	1,842	1,769	1,535	1,794	2,087	3,204
All other economies ¹	14,028	18,827	25,887	20,844	20,686	19,519	19,213
Totals	50,026	79,030	126,919	117,621	110,817	94,246	93,421

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



¹ 'Other economies' include Asian countries other than China, Japan, and South Korea, the Pacific region, Africa, and the Middle East. In 2006 the South-East Asian countries of Thailand, Malaysia, Vietnam, Indonesia and Singapore provided 6,524 students.

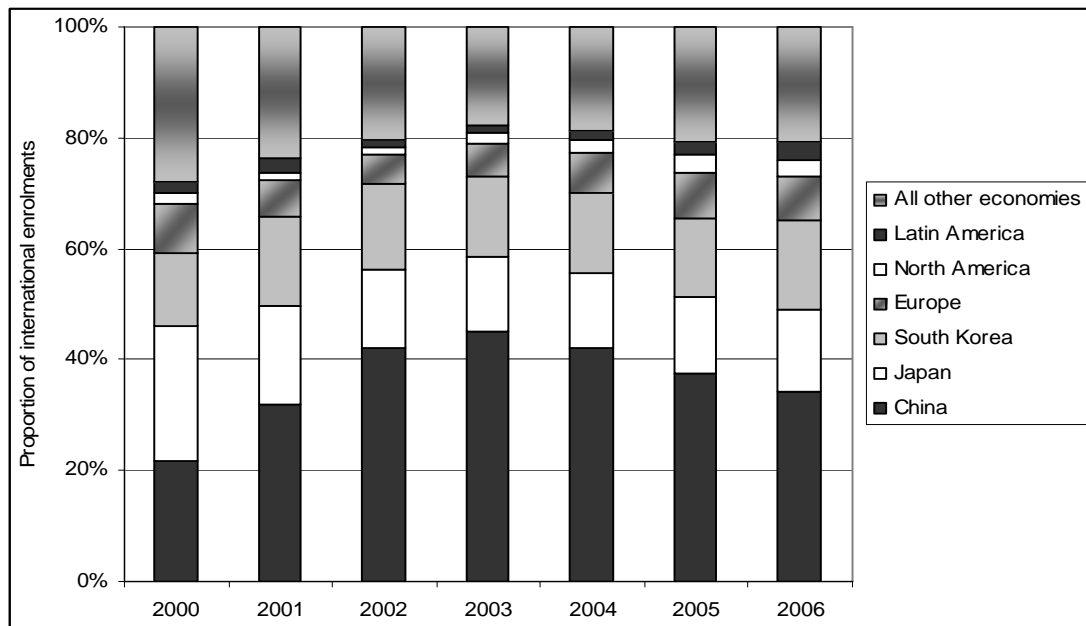
² At its lowest point in November 2000, 1 \$NZ was worth 0.40 \$US; by November 2004 the value of the \$NZ had risen 75 percent to 0.70 \$US (source: Reserve Bank of New Zealand).

The overall rise in enrolments of South Korean students since 2000 is believed to be based on a need to learn English, due to the requirements of the Korean examination system and employment within *chaebol* exporting companies. The relative decline in Korean enrolments since 2002 is likely due to strengthened pastoral care requirements for very young students, competition from other education destination countries, and the rising value of the NZ dollar.

While there has, since 2002, been a decline in the level of enrolments from China, South Korea, and other economies, there has been overall growth recorded from the relatively smaller source regions of Europe, North America, and Latin America. European enrolments have risen 62 percent from 2000 to 2006, and North American enrolments rose by 204 percent over the same period.

Chart 3 states the proportions of total international enrolments by student origins. In 2000 the 'top three' (China, Japan and South Korea) made up 59 percent of all enrolments. This rose to a peak of 73 percent in 2003, and has since reduced to 65 percent for 2006.

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 is summarised in Table 3, on a calendar year basis.

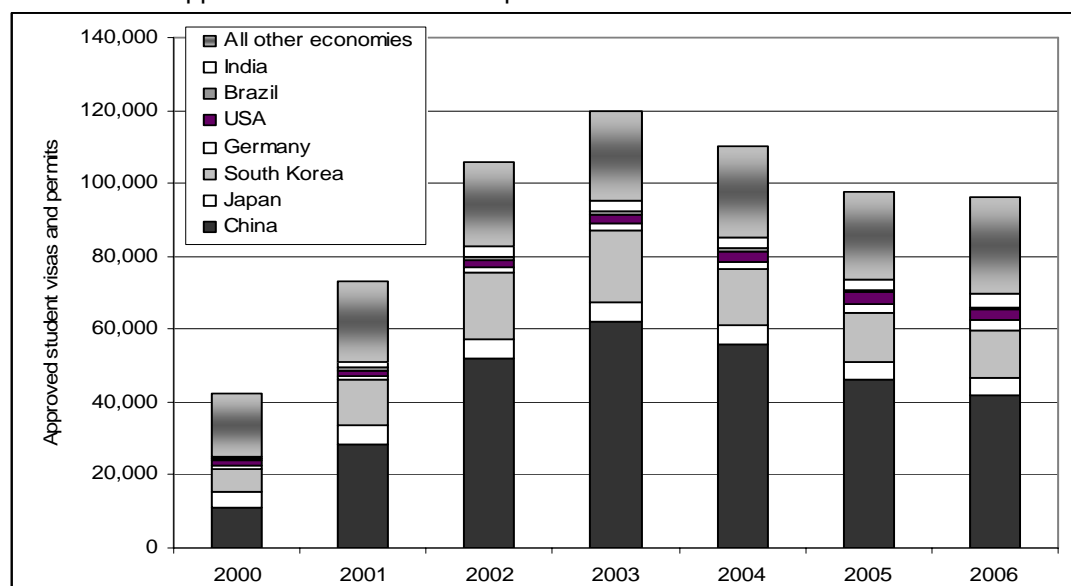
The growth in the numbers of student visas and permits from 2000 to 2003 was driven by a rapid increase in approvals for Chinese citizens, rising 463 percent from 10,992 to 61,935 approved visas and permits.

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 32 percent decline in total approvals for Chinese students, to 42,010 in 2006. There was also a marked increase in student visa and permit approvals for South Korean students, rising 204 percent from 6,420 in 2000 to 19,513 in 2003. There has subsequently been a 33 percent fall in these numbers to 12,971 in 2006.

Table 3: Approved student visas & permits, by origin	2000	2001	2002	2003	2004	2005	2006
China	10,992	28,607	51,919	61,935	55,941	46,220	42,010
Japan	4,258	5,242	5,508	5,525	5,186	4,858	4,685
South Korea	6,420	12,132	17,998	19,513	15,208	13,596	12,971
Germany	898	1,132	1,408	1,792	2,102	2,306	2,721
USA	1,249	1,442	1,973	2,603	3,033	3,050	2,913
Brazil	601	938	1,007	781	663	612	783
India	567	1,698	2,738	3,243	3,013	2,955	3,458
All other economies	17,400	21,994	23,172	24,222	24,924	24,171	26,664
Totals	42,385	73,185	105,723	119,614	110,070	97,768	96,205

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 schools 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 65 percent of all enrolments in 2006. There are also a significant number of students from Taiwan and Hong Kong (see Appendix 1 for this data) – including these enrolments in North Asia shows this region provided 69 percent of all international students in 2006.

Table 4: North Asia student enrolments	China		Japan		South Korea		Taiwan	
	2005	2006	2005	2006	2005	2006	2005	2006
Schools.	1,765	1,666	1,676	2,000	5,080	6,507	334	394
Public Tertiary Education Institutions.	23,469	18,359	1,171	1,989	1,542	2,007	422	529
Private Tertiary Education Organisations.	4,553	2,776	856	849	627	714	164	138
English Language Schools.	5,695	9,103	9,144	9,095	6,026	5,839	1,552	1,672
Totals	35,482	31,905	12,847	13,934	13,275	15,067	2,472	2,733

China

Table 5 presents a breakdown of enrolments of students from China over the past seven years. The rapid growth from 2000 to 2002 is apparent, as is the subsequent significant decline to 2006. The spread of Chinese students across provider groups is now concentrated within the public tertiary education institutions, though a decline has been evident in this sector since 2004.

This decline is due to a marked fall in new enrolments of Chinese students, who are consequently not replacing the flow of graduates⁴. While the English language schools sector reported a major fall in enrolments from 2002 to 2005, there was a substantial increase recorded in 2006. This may reflect the impact of continuing promotional activities by providers in China.

Table 5: China student enrolments*	2000	2001	2002	2003	2004	2005	2006
Schools	1,989	3,554	5,530	5,376	3,313	1,765	1,666
Public Tertiary Education Institutions	2,915	7,462	15,733	22,757	25,970	23,469	18,359
Private Tertiary Education Organisations	946	2,449	4,479	6,425	6,005	4,553	2,777
English Language Schools	5,056	11,717	27,598	18,617	11,512	5,695	9,103
Totals	10,906	25,182	53,340	53,175	46,800	35,482	31,905

* Not including the Hong Kong Special Administrative Region

Japan

Table 6 disaggregates the total enrolments from Japanese students according to provider groups. It is apparent that most Japanese students enrol within English language schools (65.3 percent in 2006). The relative stability of enrolment levels within schools is noticeable, with increases recorded each year since 2000. In the public tertiary education institutions there was a gradual fall in enrolments from 2002, and then a marked increase in 2006.

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 2002 a total of 19,357 first-time visas were issued to Chinese students; this declined to 2,393 in 2005.

Table 6: Japanese student enrolments	2000	2001	2002	2003	2004	2005	2006
Schools	1,254	1,422	1,482	1,509	1,530	1,676	2,000
Public Tertiary Education Institutions	1,210	1,363	1,424	1,325	1,276	1,171	1,989
Private Tertiary Education Organisations	650	1,040	1,202	858	861	856	850
English Language Schools	9,025	10,122	13,736	11,840	11,250	9,144	9,095
Totals	12,139	13,947	17,844	15,532	14,917	12,847	13,934

South Korea

There was a rapid growth in enrolments of South Korean students within the schools and English language sectors from 2000 to 2002. Following the downturn since the market peak, South Korean students are still concentrated in the schools and English language sectors. Notably, there has been an increasing trend in enrolments with tertiary providers since 2000.

Table 7: South Korean student enrolments	2000	2001	2002	2003	2004	2005	2006
Schools	1,496	2,622	5,063	7,232	6,519	5,080	6,507
Public Tertiary Education Institutions	713	1,146	1,446	1,411	1,562	1,542	2,007
Private Tertiary Education Organisations	508	841	1,089	812	760	627	714
English Language Schools	3,837	8,193	12,283	7,845	6,973	6,026	5,839
Totals	6,554	12,802	19,881	17,300	15,814	13,275	15,067

South-East Asia

The following table shows a sectoral breakdown for the four largest south-east Asian nations. There were increases in student enrolments recorded from Thailand, Malaysia and Indonesia from 2005 to 2006. There are wide variations in the enrolment patterns of students from these countries. Malaysian students are mainly enrolled in public tertiary education institutions, whereas Thai students predominantly enrol in English language schools. Vietnamese and Indonesian student enrolments are more broadly spread across the provider groups.

Table 8: South-East Asia student enrolments	<i>Thailand</i>		<i>Malaysia</i>		<i>Vietnam</i>		<i>Indonesia</i>	
	2005	2006	2005	2006	2005	2006	2005	2006
Schools.	786	887	124	118	166	199	70	52
Public Tertiary Education Institutions.	519	525	1,284	1,404	516	541	341	311
Private Tertiary Education Organisations.	102	136	-	42	127	107	45	70
English Language Schools.	1,279	1,347	65	122	240	137	128	331
Totals	2,686	2,895	1,473	1,686	1,049	984	584	764

India

There was a rapid growth in enrolments of students from India from 2000 to 2003, largely within the public tertiary education institutions. A further substantial increase occurred in 2006, mainly due to a surge of enrolments in English language schools.

Table 9: India student enrolments	2000	2001	2002	2003	2004	2005	2006
Schools	21	34	31	38	44	37	59
Public Tertiary Education Institutions	256	550	1,060	1,470	1,464	1,392	1,427
Private Tertiary Education Organisations	81	286	569	617	521	500	588
English Language Schools	-	217	449	178	167	185	492
Totals	358	1,087	2,109	2,303	2,196	2,114	2,566

It should be noted that the increase in enrolments in 2006 is consistent with the increase in the numbers of approved student visas and permits granted to Indian nationals, as shown in Table 3. There were a total of 3,458 approved applications recorded for the year ended 2006, a 17 percent increase from the level recorded for the year ended 2005.

The Middle East

Students from the Middle East studying in New Zealand are mainly from Saudi Arabia, and these students have predominantly enrolled in English language schools (80 percent in 2006). Recent activities by the international education sector have focused on attracting state-funded scholarship students to New Zealand universities.

Table 10: Middle East student enrolments, 2006	Saudi Arabia	Oman	UAE* & Bahrain	Turkey	Iran
Schools	43	14	7	1	3
Public Tertiary Education Institutions	257	140	40	15	39
Private Tertiary Education Organisations	62	25	8	5	4
English Language Schools	1,420	70	25	37	3
Totals	1,782	249	80	58	49

* UAE – United Arab Emirates

Europe

The consistent growth in enrolments of European students since 2000 is apparent in Table 11. Enrolments are concentrated within the English language schools and the public tertiary education institutions, though there has also been a gradual rise in enrolments in schools.

There was a significant fall in European enrolments in the tertiary institutions in 2006. The reasons for this are unclear, but *may* be linked to the ‘domestic status for new international PhD students’ policy which came into effect from 1 January 2006. Under this policy, new PhD students from Europe would not be registered as foreign fee-paying students, and so would not be included in the Export Education Levy database.

This does not wholly explain the drop in numbers, however, as there were a total of 1,084 international PhD students enrolled in New Zealand universities in 2006. Other reasons could include more competitive provision of higher education in Europe (notably in Great Britain), and the impact on student demand of the appreciating value of the New Zealand dollar relative to other destination countries' currencies.

Table 11: European student enrolments	2000	2001	2002	2003	2004	2005	2006
Schools	194	219	280	383	465	867	889
Public Tertiary Education Institutions	1,095	1,495	2,002	2,570	2,972	3,214	2,129
Private Tertiary Education Organisations	143	299	429	322	369	401	339
English Language Schools	3,107	3,158	3,835	3,713	4,167	3,441	4,014
Totals	4,539	5,171	6,546	6,988	7,973	7,923	7,365

North America

Enrolments of students from North America (overwhelmingly the United States of America) were predominantly within the public tertiary education institutions (90 percent in 2006). The fall in enrolments of fee-paying students in the tertiary institutions in 2006 may also be linked to the introduction of the 'domestic status for new international PhD students' policy from that year, for the same reasons as stated above, together with a possible impact on student demand due to the increased value of the New Zealand dollar relative to the United States dollar.

Table 12: North American student enrolments	2000	2001	2002	2003	2004	2005	2006
Schools	25	31	41	43	32	93	55
Public Tertiary Education Institutions	833	1,114	1,494	2,069	2,655	2,875	2,455
Private Tertiary Education Organisations	39	114	117	135	146	145	148
English Language Schools	-	-	-	-	-	-	75
Totals	897	1,259	1,652	2,247	2,833	3,113	2,733

Latin America

Enrolments of students from Latin America (defined as the Central and South America regions) have shifted to be mainly within the English language schools, from the initial broad spread across the sectors recorded in 2000. There has been a relatively slight but consistent growth in enrolments within the public tertiary education institutions. In 2006 there was a substantial increase in enrolments in the English language schools, driven mainly by demand from Brazilian students (who made up 1,805 of the 2,566 ELS enrolments).

Table 13: Latin America student enrolments	2000	2001	2002	2003	2004	2005	2006
Schools	136	211	216	189	184	248	172
Public Tertiary Education Institutions	149	201	252	273	297	324	353
Private Tertiary Education Organisations	34	57	108	175	142	116	113
English Language Schools	644	1,373	1,193	898	1,171	1,399	2,566
Totals	963	1,842	1,769	1,535	1,794	2,087	3,204

International tertiary enrolments by qualification level

The tertiary 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 14 presents the trend in international enrolments since 2000 (*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 2000 to 2002 was initially driven by a 187 percent increase in certificate enrolments; subsequently, growth until 2004 was based on a 513 percent increase in diploma and a 275 percent increase in undergraduate enrolments. Since the peak in 2002 there has been a 61 percent decline in certificate enrolments, and (since 2004) a 14 percent fall in diploma courses.

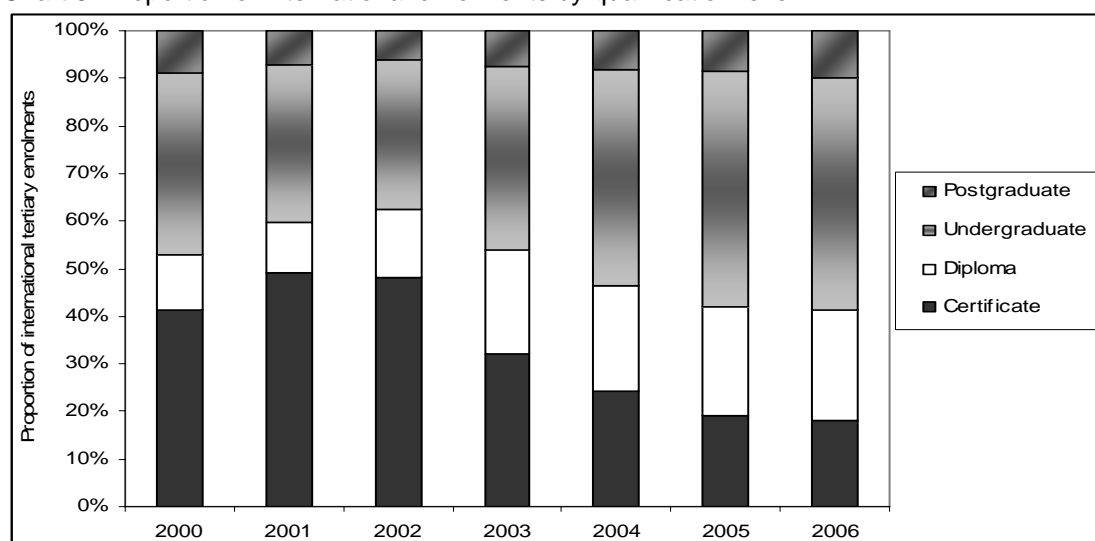
Table 14: International enrolments by qualification	2000	2001	2002	2003	2004	2005	2006	% of total, 2006
Certificate	7,399	13,921	21,240	16,714	13,483	9,931	8,228	18%
Diploma	2,018	3,017	6,313	11,302	12,381	11,643	10,639	23%
Undergraduate	6,833	9,331	13,883	19,906	25,102	25,645	22,325	49%
Postgraduate	1,595	2,067	2,760	3,935	4,567	4,351	4,442	10%
<i>Total enrolments</i>	<i>17,845</i>	<i>28,336</i>	<i>44,196</i>	<i>51,857</i>	<i>55,533</i>	<i>51,570</i>	<i>45,634</i>	<i>100%</i>
Total students*	16,809	26,565	41,461	47,121	50,450	47,369	42,652	

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 remained steady over time as a proportion of all international tertiary enrolments, at 9 percent in 2000 and nearly 10 percent in 2006. There was a marked increase in international doctorate (PhD) enrolments from

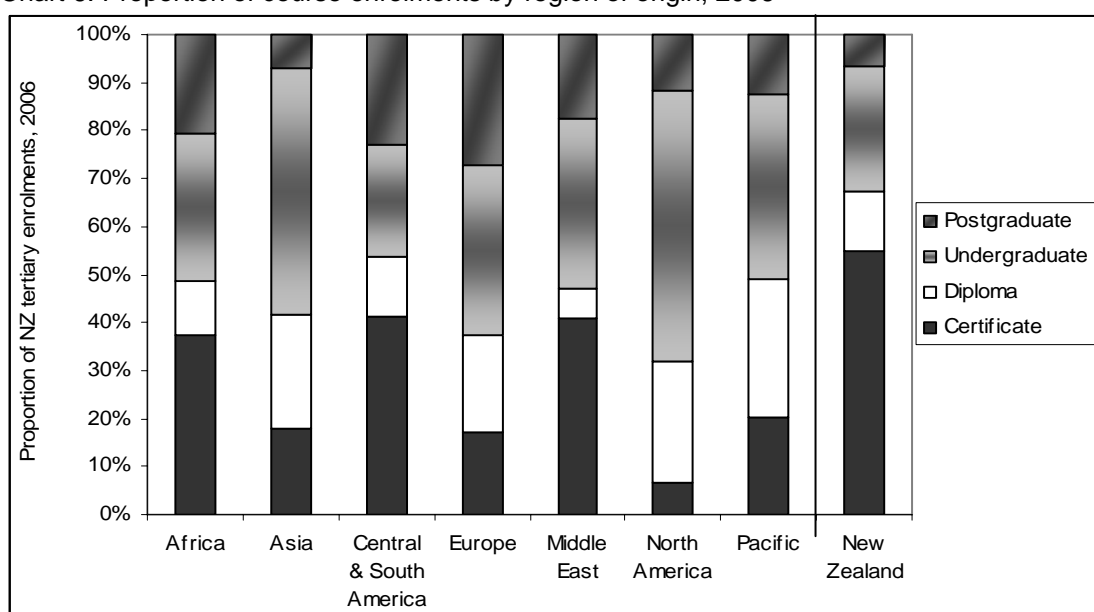
2005 to 2006 (rising from 693 to 1,084 students), however this was partly balanced by a reduction in international Masters enrolments from 2,086 to 1,800. As noted earlier, the increase in PhD studies can largely be attributed to the 'domestic fees status for new international PhD students' policy introduced from 2006.

Table 15 shows there were substantial variations in the profile of qualifications enrolments according to the regional origins of international students. In 2006 the great majority of international tertiary students came from Asia (77 percent), followed by Europe (9 percent) and North America (7 percent). Most Asian enrolments were in undergraduate courses (51 percent), as were most North American enrolments (57 percent). European enrolments had the highest proportion of postgraduate courses (27 percent).

A comparison with New Zealand tertiary enrolments in 2006 shows that, overall, international enrolments were much more focused on undergraduate studies (49 percent vs 26 percent), and had a substantially higher proportion of postgraduate enrolments (10 percent vs 6 percent). International tertiary students made up nearly 9 percent of all tertiary students in New Zealand during 2006.

Table 15: Tertiary enrolments by region & level, 2006	Africa	Asia	Central & South America	Europe	Middle East	North America	Pacific	New Zealand
Certificate	147	6,367	195	651	226	199	404	266,031
Diploma	43	8,383	59	765	35	749	573	61,090
Undergraduate	121	18,077	110	1,349	197	1,691	768	126,428
Postgraduate	81	2,521	109	1,037	96	345	252	31,304
<i>Total enrolments</i>	<i>392</i>	<i>35,348</i>	<i>473</i>	<i>3,802</i>	<i>554</i>	<i>2,984</i>	<i>1,997</i>	<i>484,853</i>
Total students	372	32,750	453	3,647	513	2,953	1,892	448,366
% of students	1%	77%	1%	9%	1%	7%	4%	

Chart 6: Proportion of course enrolments by region of origin, 2006



Appendix 1: Enrolments within provider groups by origin (2006)

The Export Education Levy database allows for disaggregation by type of provider, and specific countries, for 2006. A summary of these results is set out in Table 14, for a range of countries which either provided significant numbers of international fee-paying students, and/or have education relationships with New Zealand.

The results show that China dominates the enrolments in universities and other public tertiary institutions, respectively providing 55 percent and 46 percent of their international students. South Korea dominates enrolments in schools, providing 47 percent of these international students⁵.

It is notable that enrolments within the English language sector are now less reliant on demand from China than are the public tertiary institutions. China provided 24 percent of ELS enrolments in 2006, although the whole 'North Asia' region accounted for 69 percent of ELS students. By contrast, 'North Asia' provided 67 percent of university enrolments and 64 percent of enrolments in other public tertiary institutions.

Table 16:	Foreign Fee-Paying Students by origin, 2006	<i>Schools</i>	<i>Universities</i>	<i>Other Public Tertiary Institutions</i>	<i>Private Training Establishments (SDR providers)</i>	<i>English Language Schools (non-SDR providers)</i>	Totals
<i>North Asia</i>	China	1,666	13,316	5,043	2,777	9,103	31,905
	Japan	2,000	1,112	877	850	9,095	13,934
	South Korea	6,507	1,138	869	714	5,839	15,067
	Taiwan	394	405	124	138	1,672	2,733
	Hong Kong SAR	368	291	98	36	356	1,149
	<i>South-East Asia</i>	Vietnam	199	407	134	107	137
	Thailand	887	355	170	136	1,347	2,895
	Malaysia	118	1,265	139	42	122	1,686
	Singapore	13	142	18	10	12	195
	Indonesia	52	219	92	70	331	764
	India	59	637	790	588	492	2,566
	Saudi Arabia	43	207	50	62	1,420	1,782
	Russia	68	173	92	86	477	896
	Germany	644	356	117	40	985	2,142
	Great Britain*	58	215	345	98	63	779
	France	19	38	45	18	272	392
	USA	46	1,997	125	84	65	2,317
	Brazil	143	58	52	56	1,805	2,114
	Chile	13	60	20	14	348	455
	All other economies	636	1,887	1,783	608	3,752	8,666
Totals		13,933	24,278	10,983	6,534	37,693	93,421

* Including the United Kingdom, England, Scotland, Wales, Northern Ireland, the Channel Islands, and the Isle of Man.

⁵ South Korean students particularly dominate international enrolments in primary schools, providing (as at July 2006) 2,105 of the 2,455 foreign fee-paying students enrolled in Years 1 to 8, or 86 percent.

Appendix 2: 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 foreign fee-paying students recorded in the 2003 calendar year, there was a 23 percent decline to 93,421 in 2006.

Table 17: Foreign Fee-Paying Students who commenced a course of study during calendar years		2003	2004	2005	2006
Schools	Primary	5,380	4,792	3,471	3,611
	Secondary	15,558	13,530	10,974	10,322
	Sub-total	20,938	18,322	14,445	13,933
Tertiary Education Institutions	Polytechnics	12,483	12,599	11,965	10,721
	Colleges of Education	424	726	389	262
	Universities	24,498	28,195	27,251	24,278
	Wananga	2	8	8	0
	Sub-total	37,407	41,528	39,613	35,261
Private Providers	SDR Providers	7,334	7,682	8,895	6,515
	Non-SDR Providers	51,072	42,643	33,470	35,276
	Sub-total	58,406	50,325	42,365	41,791
Other Providers	Other Tertiary Education Providers (OTEPs)	29	12	20	19
	Subsidiary Providers*	4,387	2,488	1,823	2,417
	Totals	121,167	112,675	98,266	93,421

* 'Subsidiary providers' are mainly the English-language foundation skills units run by the universities; these figures are consequently added to the 'English language schools' figures for 2006.

Information on the tuition fee income received by providers from foreign fee-paying students also shows a declining trend. Total tuition income fell from a peak of \$775.3 million in 2004, to \$621.1 million in 2006. 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 18: Tuition fee income to providers (excl GST)		2003	2004	2005	2006
Schools	Primary	\$31,725,917	\$29,487,240	\$21,245,867	\$18,870,472
	Secondary	\$135,093,732	\$125,100,578	\$96,051,347	\$87,165,894
	Sub-total	\$166,819,649	\$154,587,818	\$117,297,214	\$106,036,366
Tertiary Education Institutions	Polytechnics	\$89,194,442	\$94,757,147	\$85,882,476	\$70,092,381
	Colleges of Education	\$3,414,971	\$4,539,753	\$4,110,798	\$2,487,184
	Universities	\$263,502,044	\$339,457,082	\$344,129,418	\$309,176,125
	Wananga	n/a	\$49,500	\$62,050	\$0
	Sub-total	\$356,111,457	\$438,803,482	\$434,184,742	\$381,755,690
Private Providers	Private Training Establishments	\$205,343,960	\$173,003,977	\$140,369,995	\$126,927,146
Other Providers	Other Tertiary Education Providers	\$65,400	\$100,150	\$138,601	\$128,904
	Subsidiary Providers	\$14,688,114	\$8,812,927	\$6,531,365	\$6,261,029
	Total Tuition Fees Paid	\$743,028,580	\$775,308,354	\$698,521,917	\$621,109,135

The distribution of foreign fee-paying students within New Zealand can also be determined from the Export Education Levy. Table 19 shows the regional breakdown of student enrolments for the 2004 to 2006 period. It is apparent that over half of international students enrol with providers located in Auckland (53 percent), followed by Canterbury (19 percent), Waikato (7 percent) and Otago (5 percent).

Almost all regions had a decline in international fee-paying enrolments from 2004 to 2006. Of the main regions with substantial numbers of students, Wellington reported the largest fall (by 36 percent), followed by Waikato (22 percent), and Manawatu-Wanganui (19 percent). Only Taranaki and Southland had slight increases in international enrolments over the period.

Table 19: Distribution of Foreign Fee-Paying Students within New Zealand	2004	2005	2006	<i>Proportion of total, 2006</i>	<i>Percentage change, 2004 - 2006</i>
Northland	563	424	396	0%	-30%
Auckland	57,884	50,901	49,558	53%	-14%
Waikato	8,146	6,897	6,326	7%	-22%
Bay of Plenty	2,345	2,432	2,112	2%	-10%
Gisborne	191	158	160	0%	-16%
Hawke's Bay	1,155	1,130	1,085	1%	-6%
Taranaki	921	1,081	989	1%	7%
Manawatu-Wanganui	3,210	3,124	2,598	3%	-19%
Wellington	9,539	7,975	6,150	7%	-36%
Tasman	114	88	107	0%	-6%
Nelson	949	911	798	1%	-16%
West Coast	54	46	81	0%	50%
Canterbury	21,382	17,497	17,710	19%	-17%
Otago	5,451	4,941	4,581	5%	-16%
Southland	292	283	318	0%	9%
<i>extramural</i>	358	272	370	0%	3%
Totals	112,675	98,266	93,421	100%	

Appendix 3: Economic benefit from international education

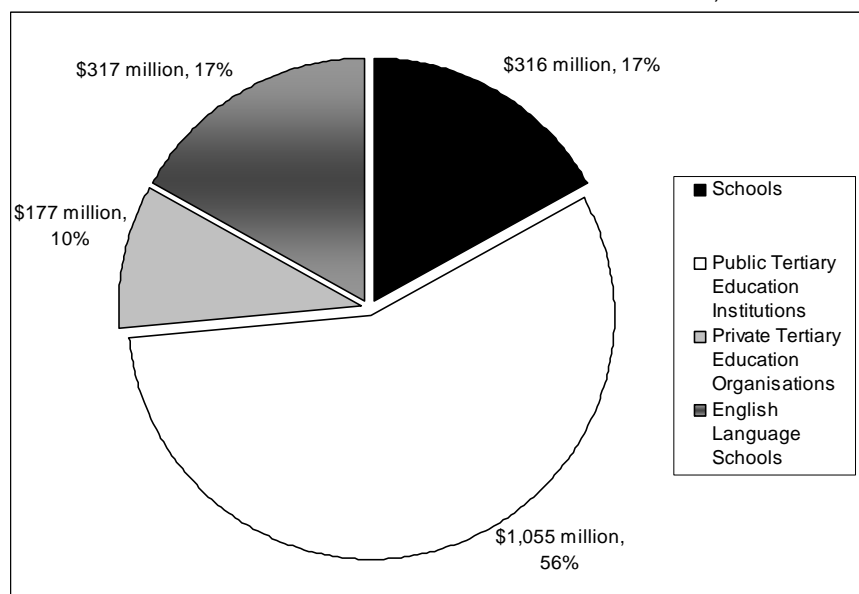
The economic contribution of the international education sector (i.e. foreign fee-paying students enrolled in New Zealand educational institutions) to the New Zealand economy has previously been calculated by Infometrics, based on 2004 data from the Export Education Levy⁶. This study estimated that the 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 and 2006 data from the Export Education Levy. Allowances have also been made for a rise in living costs based on Consumer Price Index (CPI) rates for 2005 and 2006.

Table 20: Estimated economic value-added		Schools	Public Tertiary Education Institutions	Private Tertiary Education Organisations	English Language Schools	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	37,693	93,421
<i>Economic impact</i>	<i>\$m</i>	316	1,055	177	317	1,865

It is apparent there has been a fall in EVA from \$2.21 billion in 2004, to an estimated \$1.865 billion in 2006. The distribution of the economic benefit is shown in Chart 7.

Chart 7: Economic value-added from international education, 2006



⁶ “The Economic Impact of Foreign Fee-Paying Students” Infometrics, February 2006. This report can be downloaded from <http://www.minedu.govt.nz/goto/international>