



MINISTRY OF EDUCATION

*Te Tākaka o te Mātauranga*

# INTERNATIONAL STUDENT ENROLMENTS IN NEW ZEALAND

2002 – 2008

30 July 2009

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 2002 to 2008. Summary information is also stated on the numbers of approved student visas and permits during the 2002/03 to 2008/09 financial years.

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 2002 to 2005, and is from the roll returns summaries listed on the *Education Counts* website ([www.educationcounts.govt.nz](http://www.educationcounts.govt.nz)).

### Tertiary enrolments

The Ministry's data on international enrolments within public and private tertiary education organisations is for the years 2002 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 (i.e. 'Single Data Return' providers). 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 *Education Counts* website at [www.educationcounts.govt.nz](http://www.educationcounts.govt.nz)

### 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 2002 to 31 March 2006 ([www.statistics.govt.nz](http://www.statistics.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, for example 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 publishes monthly updates on the numbers of approved applications for student visas and permits ([www.immigration.govt.nz](http://www.immigration.govt.nz)). 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 2002 to 2005 are not directly comparable with the calendar year information recorded for 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 2008 calendar years is on the websites of Education Counts, and of the Education New Zealand Trust ([www.educationnz.org.nz](http://www.educationnz.org.nz)).

## **Summary**

From a peak of 126,919 international enrolments in 2002 there has been a 28% decline to 88,557 enrolments in 2008. This decline initially mainly affected private training establishments and schools, and from 2005 a reduction in total enrolments within the public tertiary education sector<sup>1</sup> was also recorded. A graphical representation of this data is shown in Chart 1.

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<sup>1</sup> 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.

<b>Table 1: International enrolments by provider groups</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>
Schools.	15,259	17,448	14,477	11,984	13,934	15,574	15,643
Public Tertiary Education Institutions.	30,714	39,009	43,047	40,706	35,261	31,143	29,127
Private Training Establishments.	9,443	10,475	9,876	5,807	43,909	41,998	40,912
English Language Providers.	71,503	50,689	43,417	35,749	..	..	..
Subsidiary providers	n.a.	n.a.	n.a.	n.a.	2,192	2,586	2,875
<b>Totals</b>	<b>126,919</b>	<b>117,621</b>	<b>110,817</b>	<b>94,246</b>	<b>95,296</b>	<b>91,301</b>	<b>88,557</b>

**Sources:**

2002 – 2005:

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

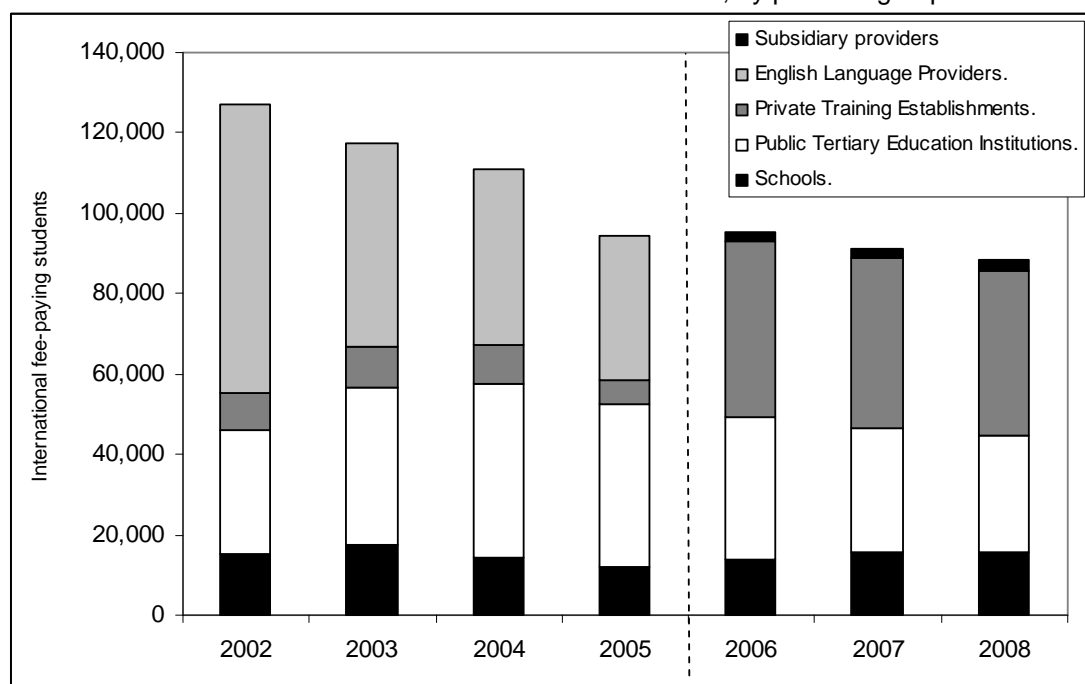
Tertiary data, for public and private providers, is for full calendar years 2001 to 2005 (Ministry of Education Single Data Return database).

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

2006 – 2008:

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. Subsidiary providers are mainly the English-language training affiliates of the eight universities.

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 size of the sector in 2002 was clearly driven by enrolments of students from the People’s Republic of China (‘China’), with 53,340 enrolments. Since the peak in 2002 there has been a 61% decline in Chinese enrolments, to 20,579 in 2008.

There has also been a marked change over time in enrolments of students from South Korea, which declined from 19,881 in 2002 to 13,275 in 2005. Since the decline recorded from 2002 to 2005 there has been a recovery in enrolments from South Korea, rising to 17,189 in 2008.

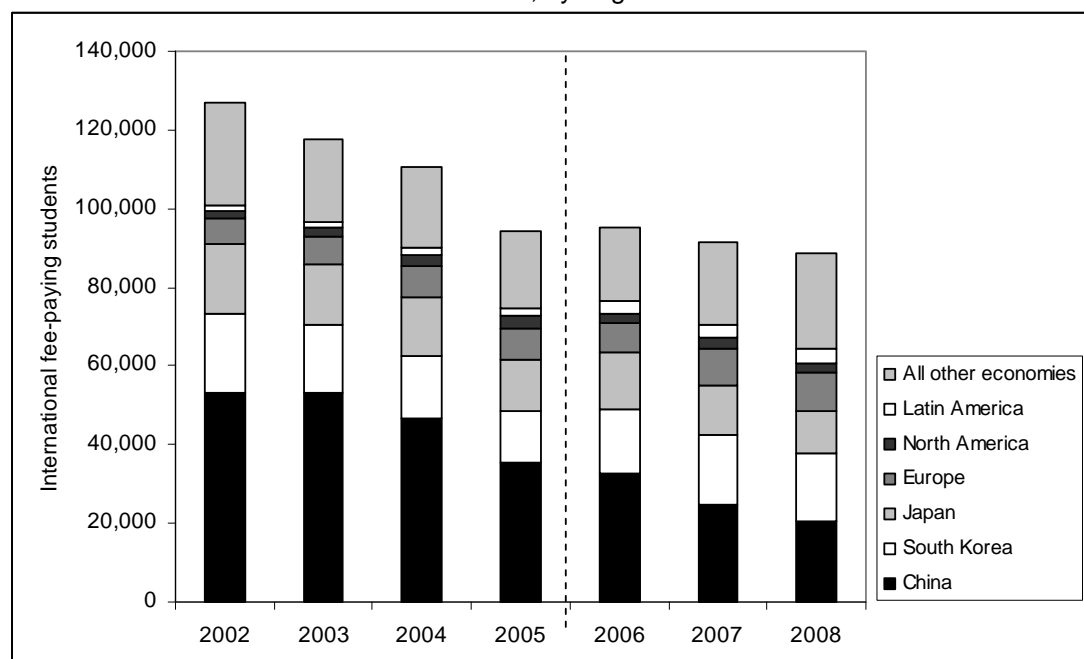
<b>Table 2: International enrolments by origin</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>
China	53,340	53,175	46,800	35,482	32,612*	24,754*	20,579*
South Korea	19,881	17,300	15,814	13,275	16,327	17,904	17,189
Japan	17,844	15,532	14,917	12,847	14,455	12,236	10,676
Europe	6,546	6,988	7,973	7,923	7,310	9,465	9,735
North America	1,652	2,247	2,833	3,113	2,734	2,730	2,651
Latin America	1,769	1,535	1,794	2,087	3,144	3,559	3,767
All other economies	25,887	20,844	20,686	19,519	18,714	20,653	23,960
<b>Totals</b>	<b>126,919</b>	<b>117,621</b>	<b>110,817</b>	<b>94,246</b>	<b>95,296</b>	<b>91,301</b>	<b>88,557</b>

\* 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 the 2002 to 2003 period has usually been ascribed to much greater competition from other countries for Chinese students (notably from Australia, the USA, Great Britain, and Canada); a greatly increased provision of tertiary education opportunities in China; and the rising value of the New Zealand dollar<sup>2</sup>.

Chart 2: Enrolments of international students, by origin



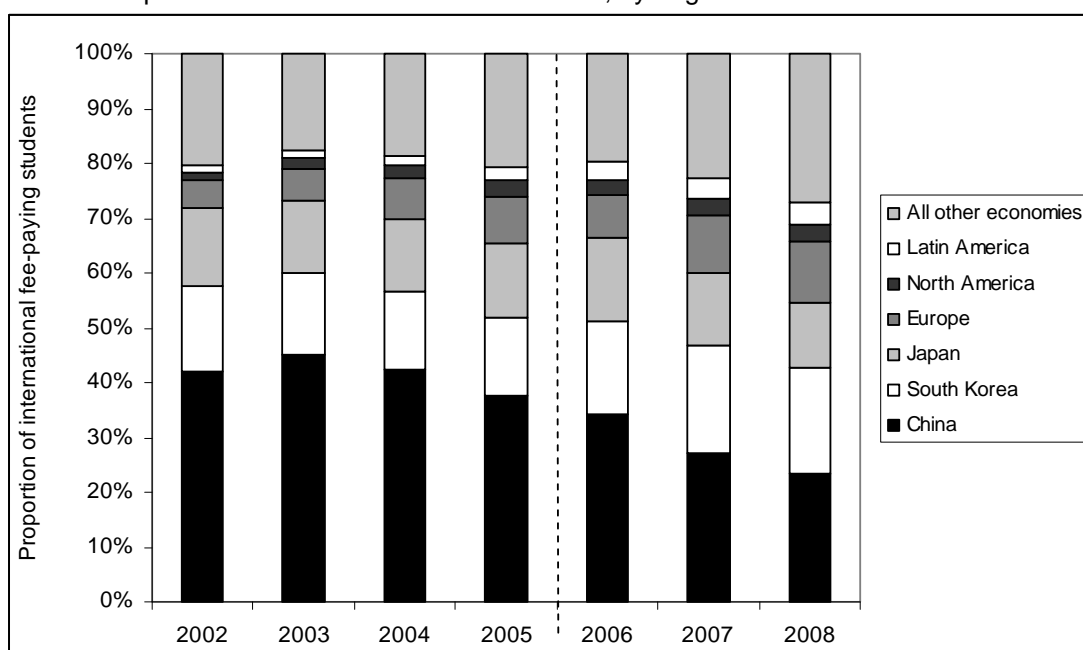
<sup>2</sup> At its lowest point in November 2000, 1 \$NZ was worth 0.40 \$US; by November 2004 the value of the \$NZ had risen 75 percent to 0.70 \$US (source: Reserve Bank of New Zealand).

The overall rise in enrolments of South Korean students since 2005 is believed to be based on a need to learn English, due to the requirements of the Korean scholastic examination system and employment within key *chaebol* exporting companies.

Since 2002 there has been overall growth recorded from the source regions of Europe, Latin America, and ‘all other economies’. In particular, as outlined later in this report, from 2006 there has been a very marked growth in enrolments of students from India and Saudi Arabia.

Chart 3 states the proportions of total international enrolments by student origins. In 2002 the ‘top three’ (China, Japan and South Korea) made up 72% of all enrolments. This proportion reduced to 55% for 2008.

Chart 3: Proportion of total international enrolments, by origin



## Student visas and permits

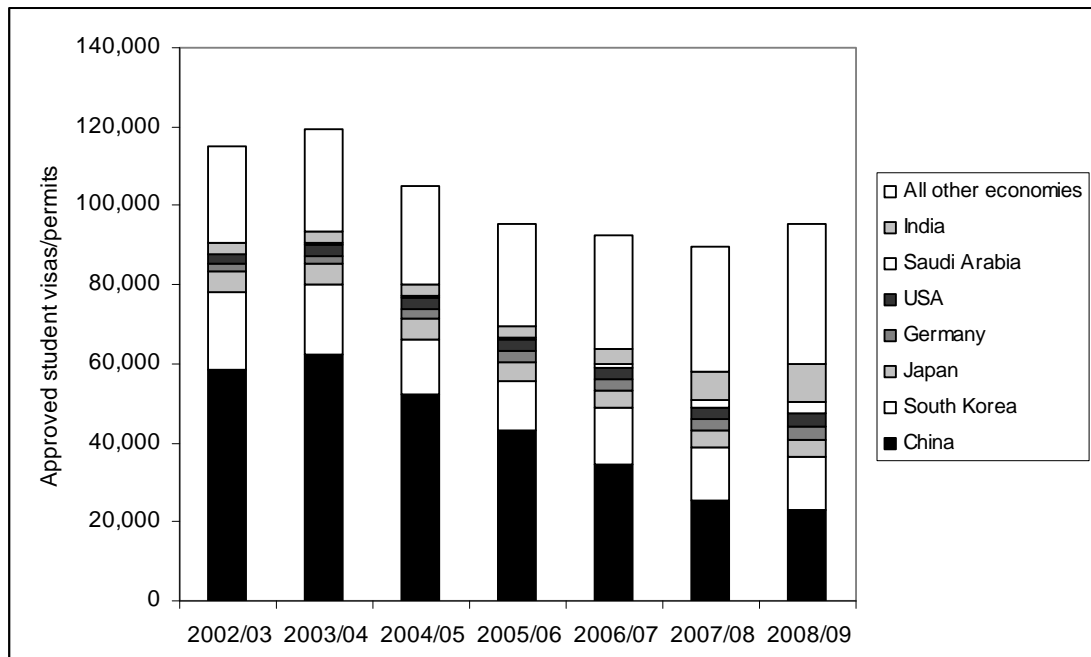
The Immigration Service of the Department of Labour collates information on the numbers of approved (and declined) applications for student visas and student permits<sup>3</sup>. This information for seven key source countries is summarised in Table 3, on a financial year basis (i.e. for the years ending 30 June).

Since the peak in 2003/04 there has been a 53% decline in total approvals for Chinese students, from 62,417 to 22,917 in 2008/09. There was a very marked increase in student visa and permit approvals for Saudi Arabian students, rising from 381 in 2005/06 to 3,162 in 2008/09. Significant growth was also recorded in the numbers of approvals for students from India.

<sup>3</sup> 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, who wish to study here.

<b>Table 3: Approved student visas &amp; permits, by origin</b>	<b>2002/03</b>	<b>2003/04</b>	<b>2004/05</b>	<b>2005/06</b>	<b>2006/07</b>	<b>2007/08</b>	<b>2008/09</b>
China	58,375	62,417	52,061	43,055	34,464	25,179	22,917
South Korea	19,643	17,521	14,231	12,742	14,342	13,849	13,716
Japan	5,595	5,353	5,123	4,685	4,351	4,091	3,906
Germany	1,595	2,096	2,229	2,698	2,881	2,994	3,602
USA	2,361	2,917	3,120	2,889	3,008	2,979	3,112
Saudi Arabia	145	174	286	381	838	1,851	3,162
India	2,977	3,233	2,973	3,220	3,954	6,858	9,684
All other economies	24,509	25,564	24,798	25,612	28,859	31,804	35,438
<b>Totals</b>	<b>115,200</b>	<b>119,275</b>	<b>104,821</b>	<b>95,282</b>	<b>92,697</b>	<b>89,605</b>	<b>95,537</b>

Chart 4: Total approved student visas and permits



A comparison with the enrolment information for calendar years shows that there is usually a close relationship with the total approved student visas and permits in each financial year. The notable exceptions are that the visas approved for people from South Korea and Japan are much lower than their enrolment numbers. This is because many Korean and 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 and permit records.

### North Asia

The majority of international enrolments in New Zealand continue to come from the three main North Asian countries of China, Japan, and South Korea. These three countries provided 55% of all enrolments in 2008. There are also a significant number of students from Taiwan.

<b>Table 4: North Asia student enrolments</b>	<i>China (including Hong Kong SAR)</i>		<i>Japan</i>		<i>South Korea</i>		<i>Taiwan ROC</i>	
	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>
Schools.	2,106	2,080	1,789	1,667	6,579	6,584	356	329
Public Tertiary Education Institutions.	13,262	10,056	2,020	1,816	2,118	1,984	526	500
Private Training Establishments*	9,408	8,443	8,427	7,193	8,806	8,621	1,942	1,289
<b>Totals</b>	<b>24,776</b>	<b>20,579</b>	<b>12,236</b>	<b>10,676</b>	<b>17,503</b>	<b>17,189</b>	<b>2,824</b>	<b>2,118</b>

**Note:** The slight differences between the respective country totals for 2007, as stated in Table 2 and Table 4, are due to minor errors in reporting/recording of provider details.

\* including subsidiary providers.

The spread of Chinese students across provider groups is concentrated within the public tertiary education institutions, though a decline has been evident in this sector due to a marked fall in new enrolments of Chinese students since 2004.

It is apparent that most Japanese students enrolled within private training establishments (67% in 2008), as did students from Taiwan. South Korean students were concentrated in the schools, and private training establishment sectors, with relatively few enrolled with public tertiary education institutions.

## 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.

<b>Table 5: South-East Asia student enrolments</b>	<i>Thailand</i>		<i>Malaysia</i>		<i>Vietnam</i>		<i>Indonesia</i>	
	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>
Schools.	793	887	83	85	222	283	51	38
Public Tertiary Education Institutions.	485	559	1,658	1,795	539	453	281	255
Private Training Establishments.	1,691	1,187	190	267	271	362	152	177
<b>Totals</b>	<b>2,969</b>	<b>2,633</b>	<b>1,931</b>	<b>2,147</b>	<b>1,032</b>	<b>1,098</b>	<b>484</b>	<b>470</b>

## South Asia

There has been a rapid growth in enrolments of students from India from 2007 to 2008, particularly within public tertiary education institutions and private training establishments.

<b>Table 6: South-Asia student enrolments</b>	<i>India</i>		<i>Pakistan</i>		<i>Bangladesh</i>		<i>Sri Lanka</i>	
	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>
Schools.	73	76	6	4	1	3	10	7
Public Tertiary Education Institutions.	1,948	2,992	66	104	35	26	96	120
Private Training Establishments.	1,715	2,972	38	52	19	28	17	64
<b>Totals</b>	<b>3,736</b>	<b>6,040</b>	<b>110</b>	<b>160</b>	<b>55</b>	<b>57</b>	<b>123</b>	<b>191</b>

It is notable that the 61% increase in enrolments of Indian students recorded from 2007 to 2008 is greater than the 41% increase in approved student visas and permits granted to Indian nationals from 2007/08 to 2008/09, as shown in Table 3.

### **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 (71% in 2008).

<b>Table 7: Middle East student enrolments</b>	<i>Saudi Arabia</i>		<i>Oman</i>		<i>United Arab Emirates, Kuwait, Qatar &amp; Bahrain</i>		<i>Turkey &amp; Iran</i>	
	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>
Schools.	92	231	13	12	39	40	12	11
Public Tertiary Education Institutions.	496	955	155	157	105	134	59	45
Private Training Establishments.	2,076	2,914	121	111	117	154	73	106
<b>Totals</b>	<b>2,664</b>	<b>4,100</b>	<b>289</b>	<b>280</b>	<b>261</b>	<b>328</b>	<b>144</b>	<b>162</b>

### **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. From 2007 to 2008 there were marked increases in enrolments of German students in schools, and in French enrolments with private training establishments.

<b>Table 8: European student enrolments</b>	<i>Germany</i>		<i>France</i>		<i>Switzerland</i>		<i>Russia</i>	
	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>
Schools.	1,460	1,672	52	63	29	22	91	109
Public Tertiary Education Institutions.	482	460	141	113	39	30	281	304
Private Training Establishments.	954	966	1,110	1,273	1,481	1,282	575	735
<b>Totals</b>	<b>2,896</b>	<b>3,098</b>	<b>1,303</b>	<b>1,449</b>	<b>1,549</b>	<b>1,334</b>	<b>947</b>	<b>1,148</b>

## North America

Enrolments of students from North America (overwhelmingly the United States of America) are predominantly within the public tertiary education institutions.

<b>Table 9: North America student enrolments</b>	<i>United States of America</i>		<i>Canada</i>	
	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>
Schools.	86	64	16	24
Public Tertiary Education Institutions.	2,106	2,043	273	294
Private Training Establishments.	151	144	98	82
<b>Totals</b>	<b>2,343</b>	<b>2,251</b>	<b>387</b>	<b>400</b>

## 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 10.

<b>Table 10: Latin America student enrolments</b>	<i>Brazil</i>		<i>Chile</i>		<i>Argentina</i>		<i>Colombia</i>	
	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>	<b>2007</b>	<b>2008</b>
Schools.	291	389	49	42	10	17	7	28
Public Tertiary Education Institutions.	104	95	96	92	25	24	27	23
Private Training Establishments.	2,022	1,997	309	391	210	114	173	276
<b>Totals</b>	<b>2,417</b>	<b>2,481</b>	<b>454</b>	<b>525</b>	<b>245</b>	<b>155</b>	<b>207</b>	<b>327</b>

## 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 2002 (*note* – this data is not directly comparable with the Export Education Levy data in the Appendices).

It is notable that there have been marked changes in demand from international students for the qualifications taught by tertiary education providers. From 2002 to 2007 there was a 55% decline in international enrolments in certificate courses. Similarly, from 2003 to 2007 there was a 35% fall in enrolments in diploma courses. Conversely, there has been a marked rise in international enrolments in postgraduate courses, rising 147% from 2002 to the end of 2008. There was a very marked increase in international doctorate (PhD) enrolments from 2005 to 2008 (rising from 692 to 1,960 students). This increase can largely be attributed to the ‘domestic fees status for new international PhD students’ policy introduced from 2006.

<b>Table 11: International enrolments by qualification level</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>% of total, 2008</b>
Certificate	19,326	15,140	12,377	9,018	8,335	8,768	9,484	22%
Diploma	9,357	14,467	15,604	13,726	10,674	9,323	9,712	23%
Undergraduate	13,384	18,719	23,184	23,910	21,685	19,391	17,022	40%
Postgraduate	2,482	3,971	4,835	4,810	4,969	5,442	6,124	14%
<i>Total enrolments</i>	<i>44,549</i>	<i>52,297</i>	<i>56,000</i>	<i>51,464</i>	<i>45,663</i>	<i>42,924</i>	<i>42,342</i>	<i>100%</i>
<b>Total students*</b>	<b>40,825</b>	<b>47,056</b>	<b>50,395</b>	<b>47,278</b>	<b>42,705</b>	<b>39,842</b>	<b>39,783</b>	

**Notes:** Postgraduate totals include Honours degrees & Postgraduate Diplomas; Masters; & 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

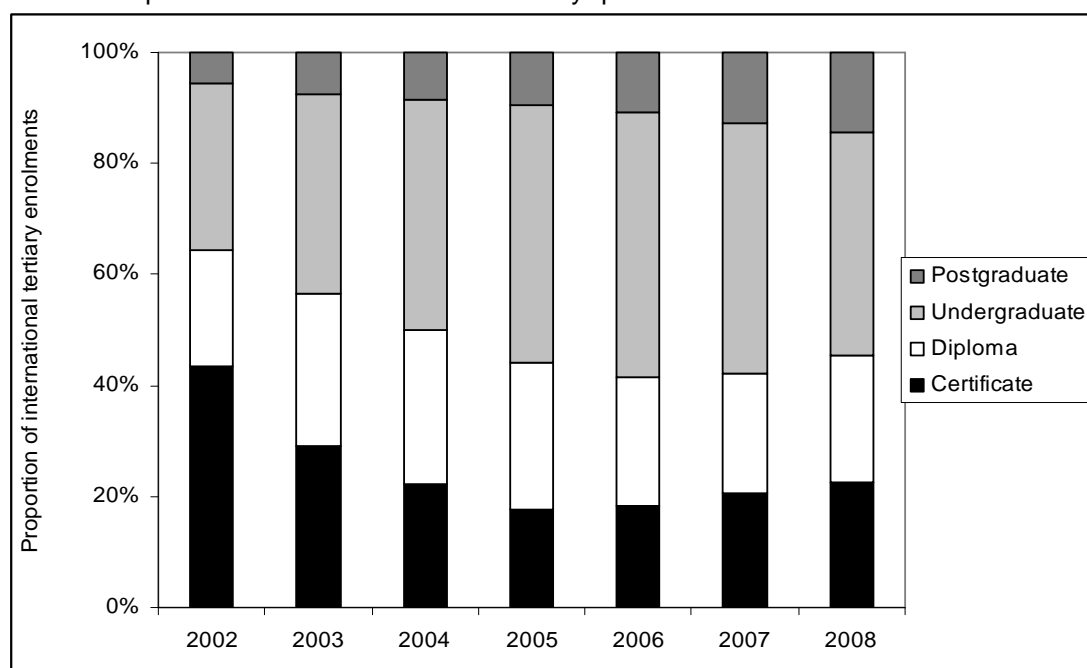
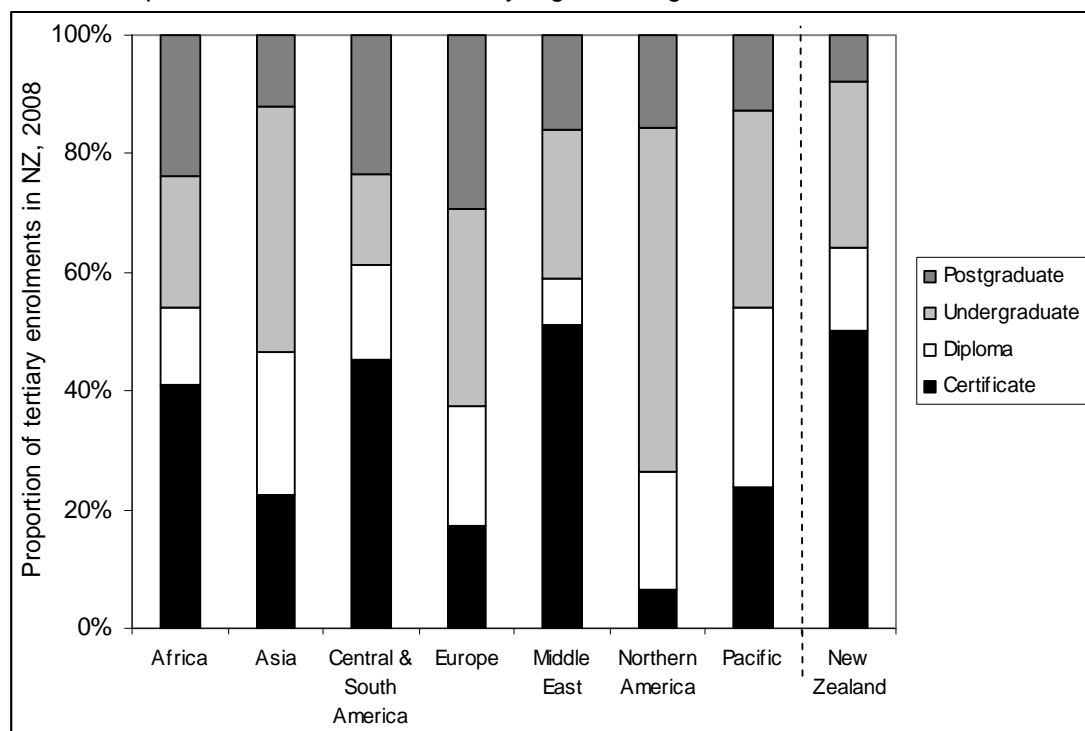


Table 12 shows there were substantial variations in the profile of qualifications enrolments according to the regional origins of international students. In 2008 the great majority of international tertiary students came from Asia (71%), followed by Europe (10%) and Northern America (8%). The largest proportion of Asia enrolments were in undergraduate courses (41%), as were most North American enrolments (58%). European enrolments had the highest proportion of participation in postgraduate courses (29%).

A comparison with New Zealand tertiary enrolments during 2008 shows that, overall, international enrolments were much more focused on undergraduate studies (40% vs 28%), and had a substantially higher proportion of postgraduate enrolments (14% vs 8%). During 2008 the 39,783 international tertiary students made up nearly 9% of all tertiary students enrolled with New Zealand tertiary providers.

<b>Table 12: Tertiary enrolments by region &amp; level, 2008</b>	<b>Africa</b>	<b>Asia</b>	<b>Central &amp; South America</b>	<b>Europe</b>	<b>Middle East</b>	<b>Northern America</b>	<b>Pacific</b>	<b>New Zealand</b>
Certificate	247	6,853	310	717	651	200	506	229,593
Diploma	78	7,348	109	830	101	596	650	63,524
Undergraduate	132	12,622	104	1,385	319	1,746	714	128,746
Postgraduate	143	3,655	160	1,215	205	476	269	35,961
<i>Total enrolments</i>	<i>600</i>	<i>30,478</i>	<i>683</i>	<i>4,147</i>	<i>1,276</i>	<i>3,018</i>	<i>2,139</i>	<i>457,824</i>
<b>Total students</b>	<b>568</b>	<b>28,395</b>	<b>660</b>	<b>3,955</b>	<b>1,203</b>	<b>2,987</b>	<b>2,014</b>	<b>420,634</b>
% of students	1%	71%	2%	10%	3%	8%	5%	

Chart 6: Proportion of course enrolments by region of origin, 2008



## 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 the peak of 121,190 international fee-paying students recorded in 2003, there was a 27% decline to 88,557 in 2008.

<b>Table 13: International Fee-Paying Student Enrolments</b>		2003	2004	2005	2006	2007	2008
Schools	Primary	5,277	4,755	3,467	3,611	4,109	3,470
	Secondary	15,658	13,556	10,980	10,323	11,465	12,173
	<b>Sub-total</b>	<b>20,935</b>	<b>18,311</b>	<b>14,447</b>	<b>13,934</b>	<b>15,574</b>	<b>15,643</b>
Tertiary Education Institutions	Polytechnics	12,483	12,599	11,965	10,721	10,007	10,179
	Colleges of Education*	424	726	389	262	0	0
	Universities	24,922	28,921	27,640	24,540	21,136	18,948
	Wananga	2	8	8	0	0	0
	<b>Sub-total</b>	<b>37,407</b>	<b>41,528</b>	<b>39,613</b>	<b>35,261</b>	<b>31,143</b>	<b>29,127</b>
Private Providers	SDR Providers	7,334	7,682	8,895	6,515	6,114	7,009
	Non-SDR Providers	51,072	42,643	33,470	37,375	35,853	33,887
	Other Tertiary Education Providers	29	12	20	19	31	16
	<b>Sub-total</b>	<b>58,435</b>	<b>50,337</b>	<b>42,385</b>	<b>423,909</b>	<b>41,998</b>	<b>40,912</b>
	Subsidiary Providers**	4,413	2,488	1,823	2,192	2,586	2,875
	<b>Totals</b>	<b>121,190</b>	<b>112,664</b>	<b>98,268</b>	<b>95,296</b>	<b>91,301</b>	<b>88,557</b>

\* '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 shows a declining trend from 2004 to 2007, and a slight increase in 2008.

<b>Table 14: Tuition fee income to providers, \$ million (excl GST)</b>		2003	2004	2005	2006	2007	2008
Schools	Primary	\$31.7	\$29.5	\$21.2	\$18.9	\$22.6	\$18.6
	Secondary	\$135.1	\$125.1	\$96.0	\$87.1	\$95.7	\$100.0
	<b>Sub-total</b>	<b>\$166.8</b>	<b>\$154.6</b>	<b>\$117.3</b>	<b>\$106.0</b>	<b>\$118.2</b>	<b>\$118.6</b>
Tertiary Education Institutions	Polytechnics	\$89.2	\$94.7	\$85.9	\$70.1	\$64.4	\$67.1
	Colleges of Education	\$3.4	\$4.5	\$4.1	\$2.5	\$0	\$0
	Universities	\$263.5	\$339.4	\$344.1	\$309.2	\$273.7	\$251.1
	Wananga	n/a	\$0	\$0	\$0	\$0	\$0
	<b>Sub-total</b>	<b>\$356.1</b>	<b>\$438.8</b>	<b>\$434.2</b>	<b>\$381.8</b>	<b>\$338.1</b>	<b>\$318.2</b>
Private Providers	SDR providers	\$72.9	\$65.0	\$60.4	\$51.2	\$47.1	\$59.3
	Non-SDR providers	\$132.4	\$107.9	\$79.9	\$77.6	\$84.9	\$96.5
	Other Tertiary Providers	\$0.6	\$0.1	\$0.1	\$0.1	\$0.2	\$0.1
	<b>Sub-total</b>	<b>\$205.1</b>	<b>\$169.9</b>	<b>\$140.5</b>	<b>\$129.3</b>	<b>\$132.3</b>	<b>\$155.9</b>
	Subsidiary Providers	\$14.7	\$8.8	\$6.5	\$6.2	\$8.2	\$9.5
	<b>Total Tuition Fees Paid</b>	<b>\$742.7</b>	<b>\$772.1</b>	<b>\$698.5</b>	<b>\$623.3</b>	<b>\$596.8</b>	<b>\$602.3</b>

**Note:** Totals may not add due to rounding.

The distribution of international 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 2008 period. It is apparent that, in 2008, over half of international students enrolled with providers located in Auckland (57%), followed by Canterbury (16%), Waikato and Wellington (6%) and Otago (5%).

Most regions had a decline in their international fee-paying enrolments from 2004 to 2008, with the exceptions of the Tasman – Nelson – West Coast regions. Of the main areas with substantial numbers of students, Wellington reported the largest fall (-49%), followed by Waikato (-33%) and Canterbury (-32%).

<b>Table 15: Distribution of International Fee- Paying Students</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<i>Proportion of total, 2008</i>	<i>Percentage change, 2004 - 2008</i>
Northland	563	424	395	514	479	1%	-15%
Auckland	57,884	50,901	49,833	49,293	50,177	57%	-13%
Waikato	8,146	6,897	6,335	5,502	5,452	6%	-33%
Bay of Plenty	2,345	2,432	2,124	2,323	2,330	3%	-1%
Gisborne	191	158	160	135	64	0%	-66%
Hawkes Bay	1,155	1,130	1,090	1,145	1,065	1%	-8%
Taranaki	921	1,081	989	873	1,085	1%	18%
Manawatu- Wanganui	3,210	3,124	2,598	2,400	2,204	2%	-31%
Wellington	9,539	7,975	6,157	5,219	4,883	6%	-49%
Tasman	114	88	108	133	143	0%	25%
Nelson	949	911	802	944	982	1%	3%
West Coast	54	46	81	210	106	0%	96%
Canterbury	21,382	17,497	17,816	16,759	14,443	16%	-32%
Otago	5,451	4,941	4,597	4,680	4,528	5%	-17%
Southland	292	283	318	179	268	0%	-8%
<i>extramural</i>	358	272	371	541	189	0%	-47%
<b>Totals</b>	<b>112,675</b>	<b>98,266</b>	<b>93,856</b>	<b>90,934</b>	<b>88,478</b>	<b>100%</b>	<b>-21%</b>

**Note:** The slight differences in the annual totals stated in Tables 13 and 15 are due to minor non-recording of some of the information on enrolments by specific providers.

## Appendix 2: 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 2004 data from the Export Education Levy<sup>4</sup>. 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.

A further study was undertaken for the 2007/08 period<sup>5</sup>, based on a statistically significant survey of international students and research with New Zealand education providers which are active in other countries. The following table summarises the key findings of these research projects, together with data from the Export Education Levy on the fees revenue earned by providers from their enrolments of international students.

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 fees revenue, amounting to nearly \$600 million in 2007, also means international education is one of New Zealand’s top services export earners.

<b>Table 16: Estimated economic value-added</b>	Tuition fees revenue (Export Education Levy)	Estimated economic impact*	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	\$2.1 billion	\$70 million

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

Table 16 refers to the extent of offshore earnings by NZ 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’s small satellite campus in Ho Chi Minh City, Vietnam; and a major project by a consortium of New Zealand providers in developing the vocational training sector in Oman).

<sup>4</sup> “The Economic Impact of Foreign Fee-Paying Students” Infometrics, February 2006. This report can be downloaded from <http://www.minedu.govt.nz/goto/international>

<sup>5</sup> “The Economic Impact of Export Education” Infometrics, NRB and SkinnerStrategic, 30 June 2008. This report can be downloaded from <http://www.educationnz.org.nz>