

## Education New Zealand Briefing

**Title:** Updated 2019 full year international student enrolments  
**Date:** 6 November 2020 **Priority:** Medium  
**Security level:** Unclassified **ENZ ID no:** 2021-063

### Action sought

Addressee	Action sought	Deadline
Minister of Education	<p><b>Note</b> that the number of international students enrolled with New Zealand providers in 2019 has been revised from 109,629 to 115,713.</p> <p><b>Note</b> that the economic contribution of international education to New Zealand has been revised from \$5.02 billion to \$5.23 billion.</p> <p><b>Agree</b> that this briefing will be proactively released as per your expectation that information be released as soon as possible. Any information which may need to be withheld will be done so in line with the provisions of the Official Information Act 1982.</p>	

### Contact for telephone discussion (if required)

Name	Position	Cellphone	1 <sup>st</sup> contact
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### The following departments/agencies have seen this report

MoE     NZQA     MBIE     MFaT     TEC     Other:

### Comments

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### Recommendations

Education New Zealand recommends that you

a. **note** that the number of international students enrolled with New Zealand providers in 2019 has been revised from 109,629 to 115,713

**Noted**

b. **note** that the economic contribution of international education to New Zealand has been revised from \$5.02 billion to \$5.23 billion

**Noted**

c. **agree** that this briefing will be proactively released as per your expectation that information be released as soon as possible. Any information which may need to be withheld will be done so in line with the provisions of the Official Information Act 1982

**Agree** /  **Disagree**



John Goulter  
**General Manager Stakeholders and Communications**  
Education New Zealand



Hon Chris Hipkins  
**Minister of Education**  
28 / 11 / 2020



## Purpose

1. This paper advises that revisions to the Export Education Levy data for 2019 has meant that Education New Zealand (ENZ) has revised the international student enrolments and economic contribution of international education to New Zealand for 2019. ENZ previously provided you with a briefing outlining the 2019 international student enrolments and economic contribution (ENZ 2021-026).

## Background

2. The Ministry of Education reports on Export Education Levy (EEL) data which reports on the number of full-fee paying international students who come to New Zealand for study. Full-fee paying international students are those students who are not defined as “domestic students” under the Education Act 1989.
3. Other non-New Zealand citizens and residents come to New Zealand for the purpose of study but are defined as “domestic students” under the Act, such as international PhD students. Therefore, ENZ defines an international student as a non-resident who has expressly entered New Zealand with the intention of studying here or has enrolled with a New Zealander provider offshore. Included in this definition are international PhD students, exchange students, New Zealand Aid students, foreign research postgraduate students and full fee-paying international students.
4. The Ministry of Education has revised the EEL data for 2019. As a result, ENZ has revised the international student enrolments and economic contribution of international education to New Zealand for 2019.

## Revised international student enrolments and economic contribution

5. The revised data shows that prior to the impacts of COVID-19, New Zealand’s international education sector was delivering shifts expected by the *New Zealand International Education Strategy 2018-2030*.
6. The revised data continued to show a move from a focus on volume to value with slightly fewer international students enrolled with New Zealand providers, but higher tuition fees and economic contribution of the sector to New Zealand from 2018 to 2019. There was a 1% decrease (revised from a 6% decrease) in international student enrolments but a 6% increase (revised from a 1.6% increase) in the economic contribution of international education to New Zealand from 2018 to 2019.
7. The key changes to the international student enrolments and economic contribution of international education to New Zealand are shown below.

		Original data	Revised data due to EEL revisions
Estimated economic contribution of international education to New Zealand	Value in 2019	\$5.02 billion	\$5.23 billion
	% change from 2018	+1.6%	+6%
Tuition fees	Dollar change between 2016 and 2019	+\$102 million	+\$126 million

		Original data	Revised data due to EEL revisions
International student enrolments	Number in 2019	109,629	115,713
	% change from 2018	-6%	-1%
Percentage of international students enrolled with crown owned education providers	% in 2019	68%	63%
International student enrolments in the English language school subsector (ELS)	Numerical change from 2018	-3,404	+1,700
	% change from 2018	-16%	+8%
International student enrolments in the Unfunded Private Training Establishment (PTE) subsector	Numerical change from 2018	-4,982	-3,811
	% change from 2018	-37%	-30%
International student enrolments in Auckland	Numerical change from 2018	-7,888	-4,912
	% change from 2018	-12%	-7%
International student enrolments in Wellington	Numerical change from 2018	-40	+923
	% change from 2018	-1%	+14%
International student enrolments in Canterbury	Numerical change from 2018	+75	+1,144
	% change from 2018	+1%	+9%
Chinese international student enrolments	% change from 2018	-2%	+1%
Indian international student enrolments	% change from 2018	-2%	+2%
Japanese international student enrolments	% change from 2018	-8%	+12%

8. The impact of the revised data on the 2019 international student enrolments and economic contribution was positive.
9. The largest impact of the revised data was the change to the ELS subsector which changed from recording a decrease of 3,404 international student enrolments in 2019 to recording an increase of 1,700 international students in 2019.
10. The revised international student enrolments also affected the number of international students studying outside Auckland with six New Zealand regions experiencing increased international student enrolments in 2019. This was up from the five regions which recorded increased enrolments prior to the revised data being included. Wellington reported increased enrolments when the revised data was included, in addition to the Waikato, Otago, Taranaki, the Hawkes Bay and Canterbury.
11. Additionally, the size of the decrease in international student enrolments in Auckland was revised from a 12% decrease to a 7% decrease. This change was due to the number of students enrolled in the ELS subsector in Auckland being revised from a 18% decrease to a 1% increase.

12. Prior to including the revised data, only one of New Zealand's top 10 source markets (Viet Nam) recorded an increase in international student enrolments in 2019. The revised data meant that four markets (Japan, India, Viet Nam and China) of the top 10 markets recorded increased enrolments in 2019. Including the revised data meant that China and India accounted for 47% of all international student enrolments (slightly down from 48% prior to the revised data being included).

### Next steps

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13. ENZ will work with your office to agree a date for the release of the international student enrolments data on IntelliLab.

Proactively released