New Zealand International Student Enrolments—2016 Full Year

131,609 international students in 2016

Overview

International student enrolments increased by +7,245 (6%) to 131,609 in 2016.

- China continued to grow, while the Indian market showed signs of rebalancing.
- There are signs of increasing diversification in the markets we are drawing from.
- Student numbers increased across all sectors except for private training establishments (PTEs, funded), which decreased slightly by -453 (-3%). This reflects a decrease in Indian student numbers.
- The economic value of New Zealand’s international education industry in 2016 is now estimated to be $4.5 billion (including $4.2 billion onshore and $242 million offshore), an increase of $200 million on 2015 student numbers.
- There are signs of increasing diversification in the markets we are drawing from.
- Sector recruitment focus from India to China.

Key market trends

50% of international students came from China and India in 2016 (2015: 50%).

- China led the growth with +4,429 students or a 13% increase (total 38,046). All sectors except for ITPs grew from 2015. Students in ELS grew +716 or 23% (3,791).
- India declined by -496 or 3% (total 28,154). This change was concentrated across the unfunded PTE (-1,268, -10%) and funded PTE (-1,092, -13%) sectors, but was offset by growth in ELS (+264, 391%) and ITP (+792, 12%) sectors. This is a rebalancing of the India market, following the implementation of Rule 18 in 2015, and subsequent additional measures.

Japan had the second-largest increase with +907 or 10% (total 10,375). This came from a 19% growth in ELS students (+968) as Japan prepares for the 2020 Olympic Games in Tokyo.

Philippines increased by +469 or 13% (4,112). Indonesia continued to show growth with +207 or 22% (1,142).

Regional distribution

Auckland at 63% (83,609) continues to be the dominant place to study for international students (2015: 63%).

Overall, regional market share remained relatively static compared to 2015.

Wellington grew by +746 or 10% (8,179 students), Bay of Plenty grew by +257 or 17% (1,754 students), Bay of Plenty grew by +260 or 5% (5,249 students), Canterbury by +875 or 8% (11,364 students) and Auckland by +4,827 or 6% (83,609 students).

Outlook

Student visa approvals have continued to increase in 2017. This is a reliable indicator that 2017 enrolments are also likely to continue to increase from 2016 levels. It is not yet clear if the recently announced changes for the skilled migrant visa category (SMC) will impact enrolment numbers, or if it will result in a rebalancing of course selection by migration-focused markets.

The India market is expected to continue declining in volume but increase in value. We foresee a rebalancing of course and subject, moving away from lower-level qualifications and towards university enrolments. It is likely that the SMC changes will impact Indian student numbers in Level 5-6 diplomas, hospitality and management programmes.

China is expected to continue to grow, as some providers have reportedly shifted recruitment focus from India to China.

Universities

There were 27,640 international students studying at universities in 2016. The sector grew by +1,616 (6%) overall, with an increase in post-graduate enrolments.

Key market trends: China showed steady year-on-year growth, up +1,024 or 9% (11,846). India increased by +275 or 19% (1,688) and Malaysia grew by +122 or 9% (1,534). Saudi Arabia declined by -142 or -21% (547) and Brazil by -119 or -48% (128). This was due to scholarship schemes no longer running in these markets.

Level of study: Postgraduate enrolments increased at all levels, with graduate certificates/diplomas increasing by +160 or 32% (867), masters degrees increasing by +513 or 14% (4,142), and doctoral degrees up +396 or 10% (4,472).

Regional distribution: 50% of students in the university sector were in the Auckland region (13,376), followed by Wellington (3,402) and Canterbury (3,307) with 12% each.

English Language Schools (ELS)

There were 24,635 international students in the ELS sector in 2016, an increase of +3,695 (18%) on 2015.

Key market trends: There were student increases from almost all markets. Japan showed the largest increase at +968 or 19% (6,325), driven by an increase in ELS students ahead of the upcoming Tokyo Olympics. This was followed by China at +718 or 23% (3,791), Brazil at +284 or 17% (1,951) and Thailand at +232 or 23% (1,226).

Regional distribution: 72% of ELS students (17,650) are based in Auckland, which had +2,895 or 20% growth. This accounted for the majority of the increase. Overall, Wellington (+297 or 17%, 1,754 students) and Bay of Plenty (1,107 students, +116 or 12%) regions showed an increase.

This document has been produced by Education New Zealand and contains interim figures intended to give a headline overview only. A full report will be released later in the year.
Institutes of technology and polytechnics (ITP)

There were 18,239 enrolments in the ITP sector in 2016, an increase of +786 or 5%. Key market trends: Students from India (7,495) made up 41% of this sector, while 31% (5,656) were from China and 6% (1,006) were from the Philippines. Student numbers are generally increasing, particularly Indian students up 12% or +792.

Private training establishments (PTE) sector (funded)

There were 17,239 international enrolments in the funded PTE sector in 2016, a decrease of -453 or -3% on 2015.

Key market trends: India decreased (-1,092 or -13%, 7,112 students), as did Japan (-147 or -21%, 527 students). There was growth in the China market (+431 or 11%, 4,347 students) and the Philippines (+244 or 40%, 849 students).

Regional distribution: 13,495 students (78%) were based in Auckland, followed by 995 or 6% in Canterbury.

Private training establishments sector (unfunded)

There were 25,237 international students studying in the unfunded PTE sector in 2016, stable with +260 or 1% on 2015.

Key market trends: The sector was stable after a large jump of +5,810 students or +30% in 2015. 11,505 students were from India, a -1,268 or -10% decrease which may reflect both the Rule 18 implementation in late 2015, and increased visa applications immediately prior. China grew 23% or +1,054 in 2016, to 5,617 students. The Philippines and Japan were stable with 2,038 and 527 students, and Korea (1,085 students, an increase of +96 or 10%) also grew. Of note: Brazil grew by +163 students or 47% (512 students), and Thailand grew by +122 or 37% (453 students).

Regional distribution: Auckland hosted 40% of students, the Bay of Plenty hosted 10% and Wellington hosted 9%.

Regional growth: Auckland at +588 or 9% (7,274), Wellington at +202 or 14% (1,806), Bay of Plenty at +123 or 7% (1,782), Waikato at +107 or 8% (1,371) and Otago at +75 or 20% (453). Decline in Canterbury at -125 or -9% (1,237).

*Students can enrol in courses at multiple levels. Therefore, the number of students in this graph exceeds the total number of students studying at ITPs.

This dashboard combines the data sources from the Ministry of Education; the Export Education Levy and Single Data Return (SDR) data. Offshore students are included if classified as offshore in the SDR. Link to data source: student numbers (www.educationcounts.govt.nz). Outlook: Immigration New Zealand Student Visas Data. Students currently enrolling in unfunded PTE and ELS do not receive a national student number. As a result of this students enrolled in more than one unfunded provider are counted at each provider they enrolled in.

(1) Includes Full Primary, Contributing Primary, and Intermediate. (2) Includes Special, Secondary School (Year7 - Year13), Composite School (Year 1 - Year13), Restricted Composite School, and Secondary School (Year9 - Year13)