NEW ZEALAND
INTERNATIONAL EDUCATION SNAPSHOT

2013 FULL YEAR REPORT

NEW ZEALAND
EDUCATION

ThinkNew

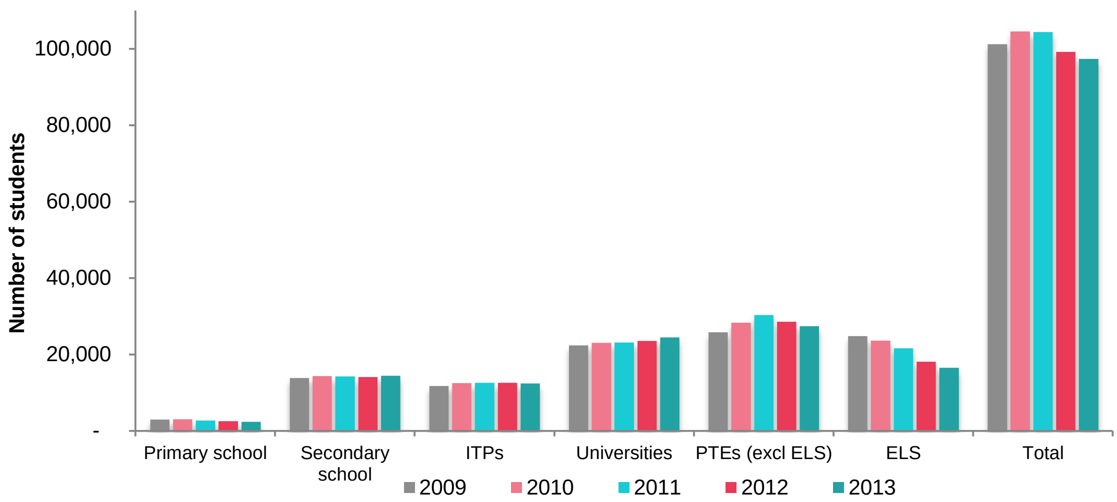
This report provides a snapshot of the trends in New Zealand's international education industry for the 2013 academic year. The report utilises information from the Export Education Levy, Single Data Return (SDR) and student visa statistics. It builds on two reports released in 2013 for the trimesters January – April and January – August.

Overview:

The 2013 academic year was a year of transition for New Zealand's international education industry. The decline experienced as a result of the Christchurch earthquakes over the past two years began to slow and stabilise, with the second half of 2013 showing strong signs of growth. This growth has continued into 2014 with student visa results trending at record levels.

In 2013 there were 97,283 international students enrolled at a New Zealand education provider[1].This is a decline of 1.8% (-1,811 students) for the full 2013 academic year compared to 2012. The decline occurred entirely in the first trimester of 2013 (January – April). Growth in the second and third trimesters offset some of this decline. The May – August trimester saw a 4% increase and the September – December trimester saw a 2% increase, on the same periods in 2012.

Figure 1[2]: The number of international students in the New Zealand international education industry, 2009 - 2013[3]



[1] This includes offshore students enrolled in a formal qualification at a university, institute of technology and polytechnics (ITPs), wānanga, and government funded private training establishment (PTEs). It also includes students enrolled in a non-formal qualification at a non-government funded PTE. See Appendix 1 for a breakdown and definition of international students used in this report.

[2] Acronyms used in Figure 1: institutes of technology (ITPs), private training establishments (PTEs) and English language providers (ELS).

[3] This excludes wānanga which had 11 enrolments in 2013, 0 in 2012, 2 in 2011, 0 in 2010, and 0 in 2009.

Table 1: The percentage and total change in international students and tuition income, 2013 vs. 2012 (excludes wānanga)

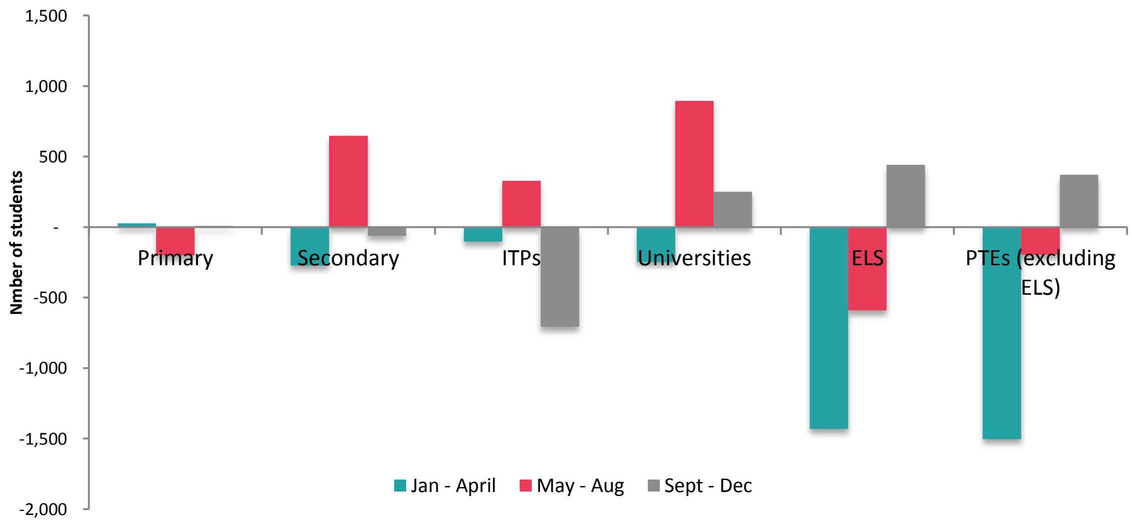
All Sectors	School	Universities	ITP	PTE (excluding ELS)	ELS	Total PTE	Total
% change in student numbers	↑1%	↑4%	↓1%	↓4%	↓9%	↓6%	**↓1.8%**
Total change	↑149	↑874	↓140	↓1,123	↓1,582	↓2,705	**↓1,811**
% change in tuition income	↑0.3%	↑6%	↑5%	↓6%	↓7%	↓6%	**↑1.3%**
Total change in tuition income ($M)	↑$0.41	↑$18.3	↑$4.6	↓$11.2	↓$2.6	↓$13.8	**↑$9.5**

Trimester trends:

The 2013 academic year saw two contrasting trends[4]. The first trimester (January – April), when approximately 60 – 65% of the year's international student enrolments occur, experienced a 5% decline in students. The remaining two trimesters (May – August and September – December) saw steady growth, when compared to the same periods in 2012.

The international education industry saw a significant change at the end of the first trimester. With the exception of the primary school sector, all sectors experienced a decline in the first trimester on the same period in 2012. From May – December, all sectors, with the exception of the institutes of technology and polytechnics (ITP) and primary school sectors, experienced steady growth. Universities ↑30%, secondary schools ↑15%, English language providers (ELS) ↑11%, and the overall private training establishment (PTE) sector was flat at 0.1%.

Figure 2: 2013 trimester breakdown of the change in the number of international students, when compared to the same period in 2012[5]



4 Trimesters are broken down to: January – April, May – August and September – December to align with SDR reporting cycles.
5 Excludes wānanga.

Key positive and negative trends for 2013:

May – December 2013 saw a 4% overall increase in student numbers on the same period in 2012. This is an increase of approximately 1,190 students.

Tuition fee income from full fee-paying students increased by 1.3% (approximately $9.5 million) in 2013. This was driven by a 4% increase in tuition income generated by postgraduate students in the Government funded tertiary sector[6].

Demand for science, technology and engineering related qualifications grew by 6%[7].

The university sector experienced growth of 4% (874), to 24,375 students.

Offshore enrolments increased by 7% in the Government funded tertiary sector.

The Canterbury region saw strong growth of 11% for the full 2013 academic year. This growth was driven by the Canterbury PTE sector which grew by 30% on 2012.

There was strong overall growth in Japanese students in 2013 (↑7%). Student numbers from China and India continued to grow at steady rates (↑2% and ↑3% respectively).

Total student visas between April and November increased by 7%.

The secondary school sector experienced growth of 2% for the full 2013 academic year when compared to 2012. The majority of this increase came from Auckland, Wellington and Canterbury, with respective increases of 2%, 10% and 7%.

While there was an overall decline in the PTE sector nationally, the final trimester (September – December) saw signs of recovery ↑7% on the same period in 2012.

Postgraduate enrolments saw strong growth (↑11%). Overall Masters level enrolments grew by 18% and PhDs grew by 9%.

Student numbers in the first trimester (January – April) declined by 5% (approximately 3,500 students), when compared to the same period in 2012.

The ITP sector had a flat result in 2013 ↓1% (-140). This decline was driven by a 5% (-619) decline in level seven and below qualifications (including Bachelors degrees). Enrolments in postgraduate qualifications continued to grow at ITPs with a 17% (324) increase in 2013.

Korean[8] student numbers declined by 15% (-1,422) in 2013. This decline equated to 80% of the total student decline in 2013.

The primary school sector declined by 7% (-165). This was driven by the decline in Korean students. If Korean students are excluded, the primary school sector saw an increase of 1% (121).

The overall decline was driven by the PTE sector which declined by 5.8% (-2,705 students). This accounted for 149% of the total decline with growth in other sectors offsetting some of the decline from this sector.

The ELS sector declined by 9%.

[6] Government funded providers include universities, ITPs, and Government funded PTEs.
[7] This includes SDR Broad Field categories: Engineering and Related Technologies and Natural and Physical Sciences.
[8] This only includes students from the Republic of Korea.

Overall international student trends

Full year 2013

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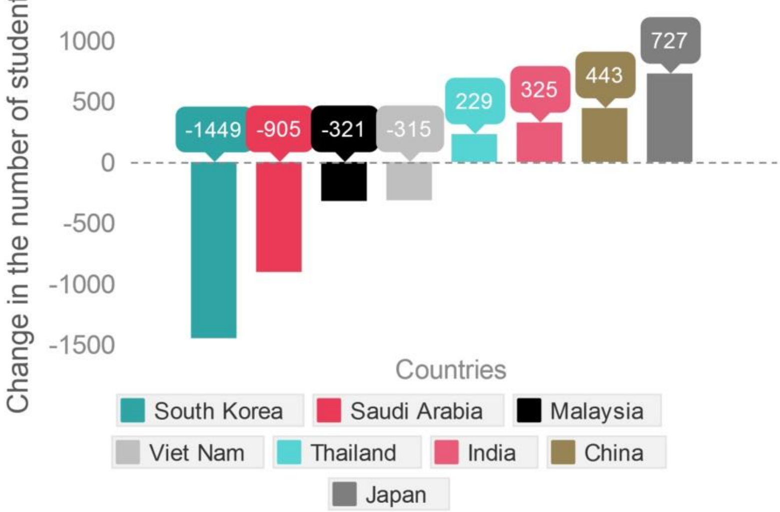
The number of international students	Tuition fee income for full fee-paying students	Students studying at Postgraduate level*	Students studying in the Canterbury region	Students studying offshore
-1.8%	+1.3%	+11%	+11%	+7%

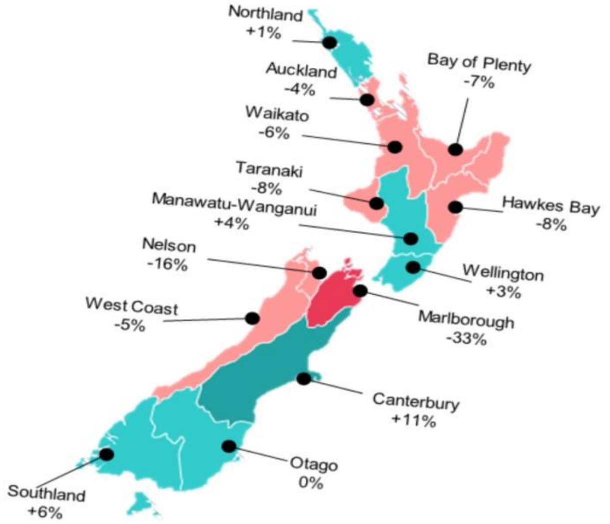
Number of international students from 2009 to 2013

2009	2010	2011	2012	2013
101178	104460	104293	99094	97283

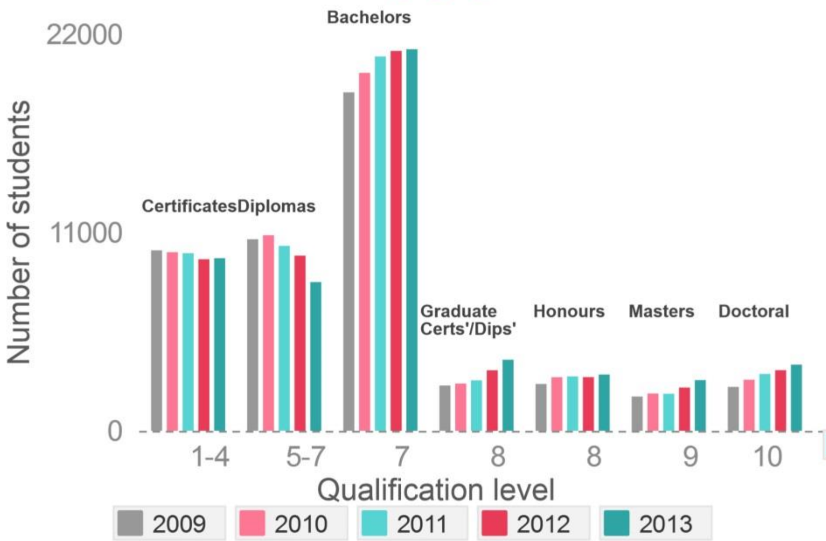
Top four increases & decreases by source country



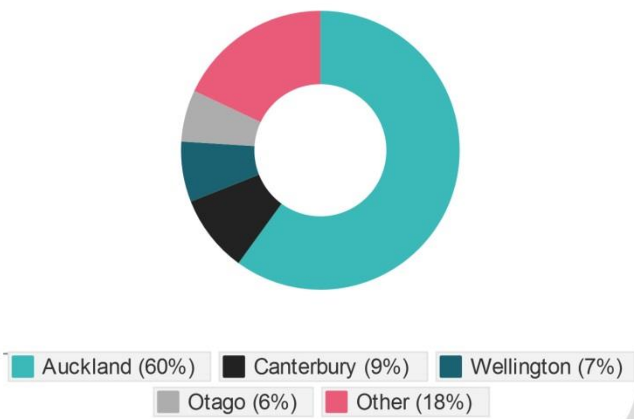
Regional increases & decreases



Number of students studying by level 2009 - 2013*



Proportional distribution of students by region, 2013



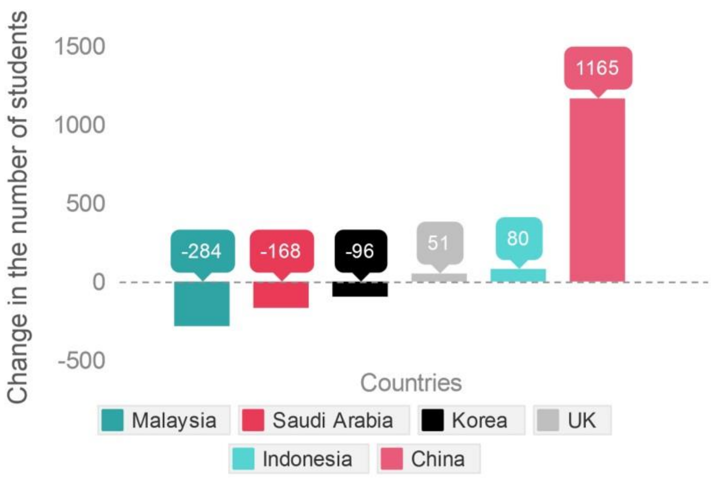
Developed by Education New Zealand.
This infographic includes data on full fee-paying, NZ Aid, PhD, foreign research postgraduate and exchange students.
It combines the following data sources from the Ministry of Education: the Export Education Levy and Single Data Return (SDR) data.
Offshore students are also included if classified as offshore in the SDR.
Links to data sources: student numbers (www.educationcounts.govt.nz), student visas (www.immigration.govt.nz), Australian data (www.aei.gov.au)
*These include Government funded tertiary providers only, which includes universities, institutes of technology (ITPs), wānanga, and government funded private training establishments (PTEs).

University sector international student trends Full year 2013

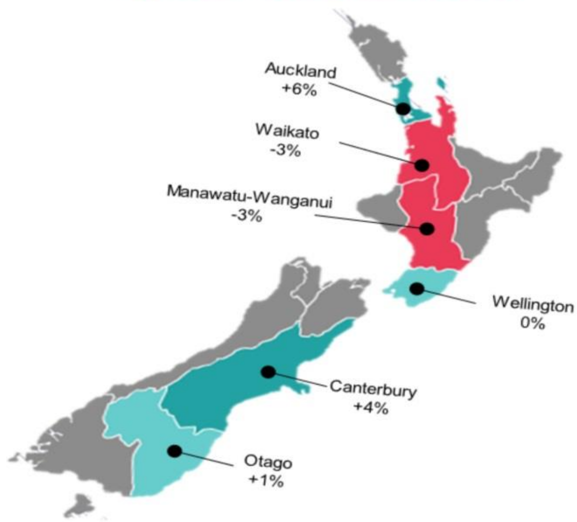
The number of international students	Tuition fee income for full fee-paying students	Students studying at Masters level	Students studying Engineering & related technologies	Number of "Higher Education" enrolments in Australia
+4%	+6%	+17%	+12%	+0.6%

Number of international students from 2009 to 2013

Top three increases & decreases by source country

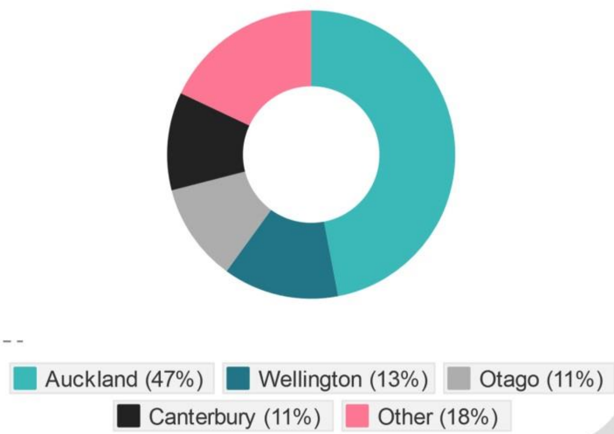


Regional increases & decreases



Students enrolments by level 2009 - 2013*

Proportional distribution of students by region, 2013



Developed by Education New Zealand.
This infographic includes data on full fee-paying, NZ Aid, PhD, foreign research postgraduate and exchange students.
The data was sourced from the Single Data Return (SDR) through the Ministry of Education.
Offshore students are also included if classified as offshore in the SDR.
Links to data sources: student numbers (www.educationcounts.govt.nz), student visas (www.immigration.govt.nz), Australian data (www.aei.gov.au)
*Sub-degree includes Certificates from level 1 – 4 and Diplomas from level 5 – 7.in the SDR.

ITP sector international student trends Full year 2013

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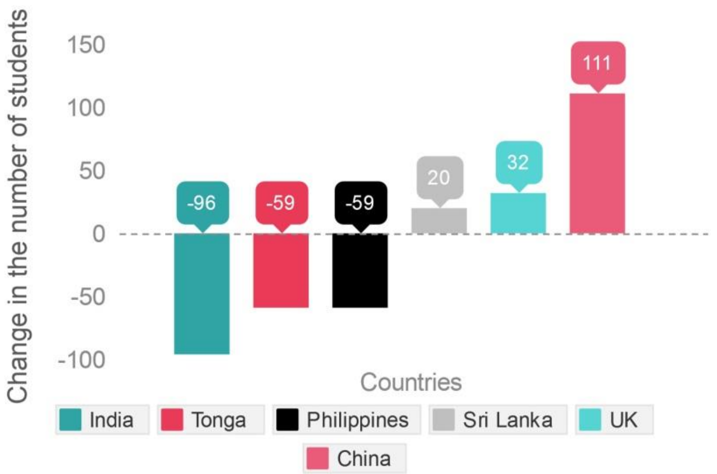
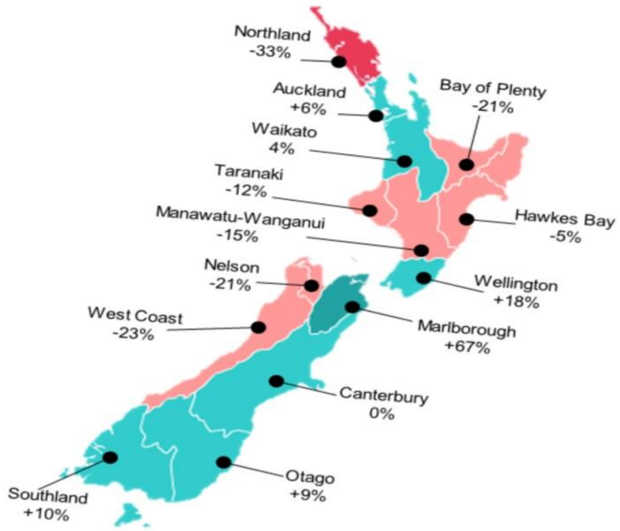
The number of international students	Tuition fee income for full fee-paying students	Students studying at postgraduate level	Students studying 'Architecture & Building'	Number of "Vocational Education & Training" enrolments in Australia
-1%	+5%	+17%	+20%	-6.4%

Number of international students from 2009 to 2013

Top three increases & decreases by source country

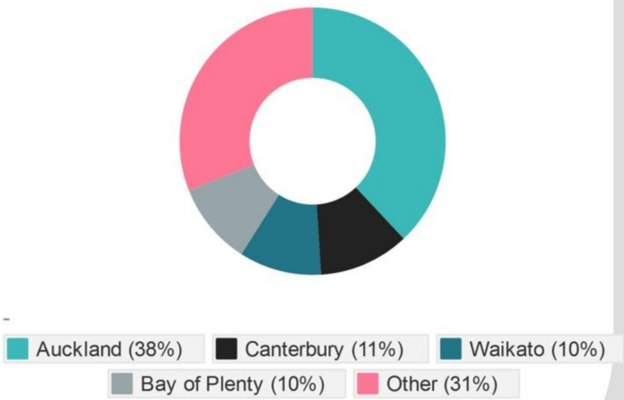


Regional increases & decreases



Students enrolments by level 2009 - 2013*

Proportional distribution of students by region, 2013



Developed by Education New Zealand.
This infographic includes data on full fee-paying, NZ Aid, PhD, foreign research postgraduate and exchange students sourced from the single data return (SDR).
Offshore students are also included if classified as offshore in the SDR.
Links to data sources: student numbers (www.educationcounts.govt.nz), student visas (www.immigration.govt.nz), Australian data (www.aei.gov.au)
*Postgraduate includes Graduate certificates, Honours, and Masters level qualifications.

School sector international student trends Full year 2013

The number of international students at primary schools

-7%

Tuition fee income for full fee-paying students at primary schools

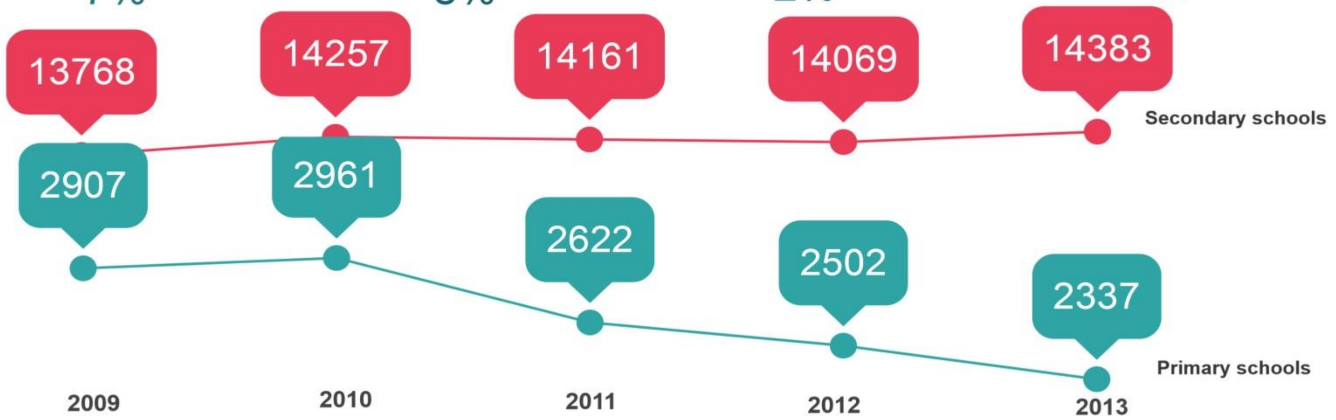
-8%

The number of international students at secondary schools

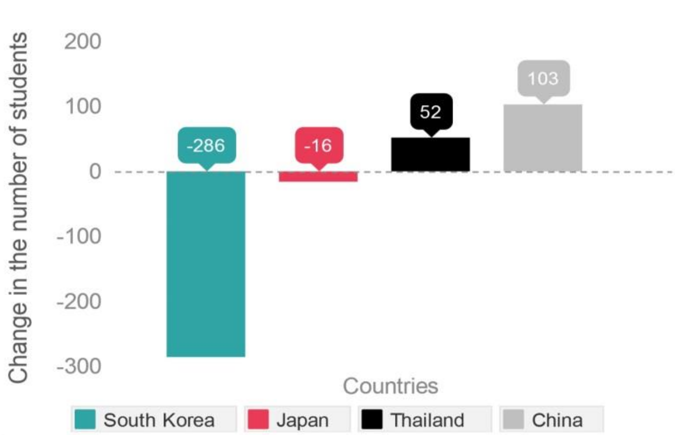
+2%

Tuition fee income for full fee-paying students at secondary schools

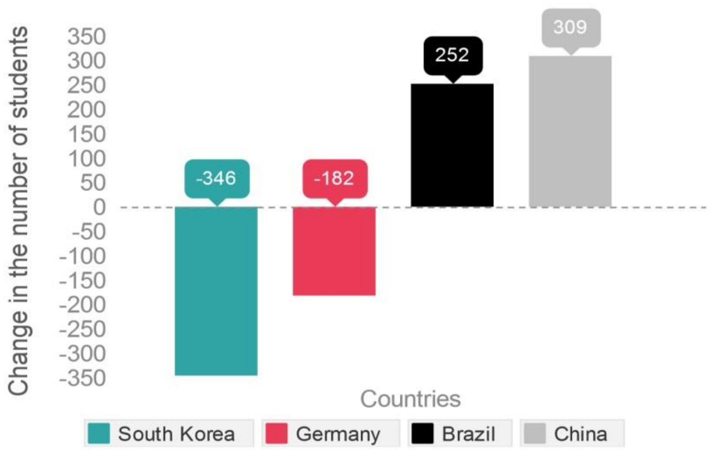
+1%



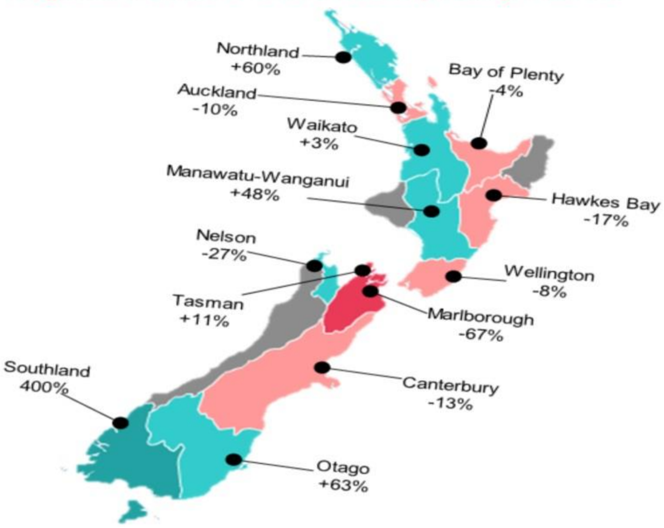
Top two increases & decreases by source country: primary schools



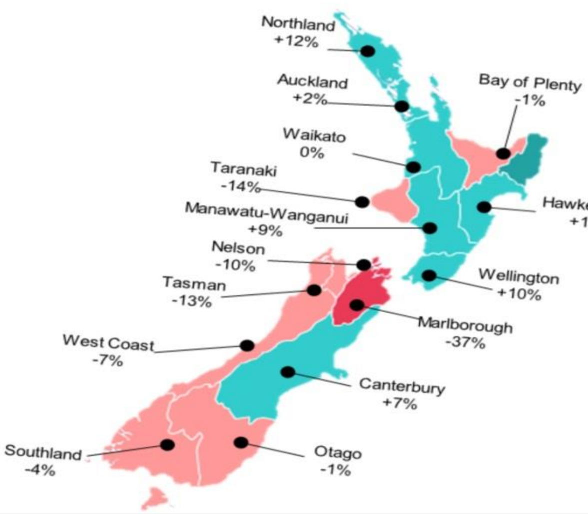
Top two increases & decreases by source country: secondary schools



Regional increases & decreases: primary schools



Regional increases & decreases: secondary schools



Developed by Education New Zealand.
This infographic includes data on full fee-paying and exchange students.
The data is sourced from the Ministry of Education's Export Education Levy data (www.educationcounts.govt.nz).

PTE sector international student trends Full year 2013

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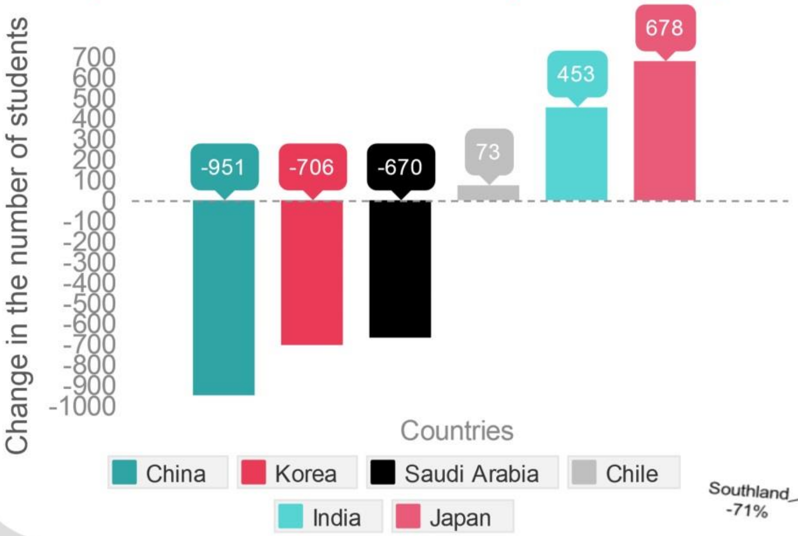
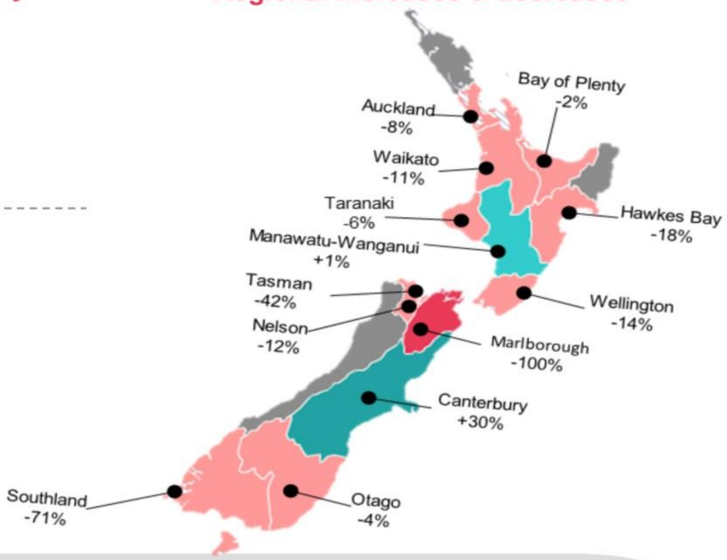
The number of international students	Tuition fee income for full fee-paying students	PTE Enrolments in Christchurch	Japanese students	Number of "English language sector" enrolments in Australia
-6%	-6%	+30%	+12%	+20%

Number of international students from 2009 to 2013

Top three increases & decreases by source country

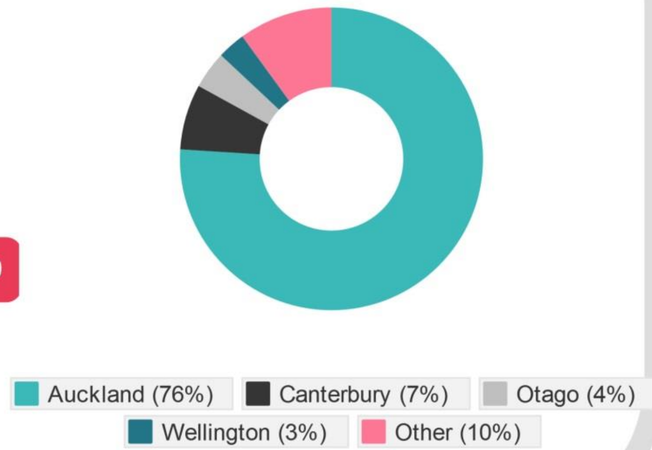


Regional increases & decreases



Number of international students in the English language sector from 2009 to 2013

Proportional distribution of students by region, 2013



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It combines the following data sources from the Ministry of Education: the Export Education Levy and Single Data Return (SDR) data.
Links to data sources: student numbers (www.educationcounts.govt.nz), student visas (www.immigration.govt.nz), Australian data (www.aei.gov.au).
This data includes SDR-PTEs, Non-SDR PTEs, and Subsidiaries

Analysis:

There were two key factors that impacted on the overall student numbers in New Zealand's international education industry in 2013. These were:

- **The loss of almost 1,450 Korean students, contributing to 80% of the total decline in students.**

- **The PTE sector experiencing a loss of 2,705 students, which was partially offset by growth from the university and secondary school sectors.**

Korean decline:

The signals from Korea suggest that the decline in students is a global trend, driven by in-market socio-economic factors, which have impacted on the number of Korean students studying abroad. There was a 40% decrease in outbound Korean school students between 2006 and 2012. There appears to be two key changes that have occurred in Korea to contribute to this:

- demographical changes such as decline in birth rate and the shrinking of the middle class

- a drive by the Korean government to retain students and expand the delivery of education domestically, specifically English language provision.

Students returning to Korea from New Zealand to continue studies are often required to produce documentation from New Zealand which states that the school or training provider they studied at was officially "government approved". Formal recognition arrangements between New Zealand and Korea would assist in the further promotion of New Zealand as a priority education destination for Korean students and may also impact on their willingness to stay on in New Zealand for tertiary study. A recognition arrangement with the key Korean agencies is currently being negotiated by the New Zealand Qualifications Authority (NZQA) and Education New Zealand (ENZ).

Early signals suggest that the Korean market is recovering and showing signs of growth with total approved student visas for the first quarter of 2014 ↑11% (247 additional student visas approved), when compared to the same period in 2013.

PTE decline:

There was a net decline of 5.8% (approximately 2,700 students) in the PTE sector, of which 58% (1,580 students) were attributed to English language providers. The decrease in PTE students was centred in Auckland which accounted for 99% of the net PTE decline. Decreases were experienced in other regions also such as Wellington ↓14% (-224) and Waikato ↓11% (-143). However, strong growth from the Canterbury region offset much of the overall decline (↑30%) (658).

Approximately 96% of the PTE decline can be attributed to four key countries; China represented 33%, Korea 24%, Saudi Arabia 23%, and Brazil 16% of the total decline.

ENZ met with a range of PTEs in October 2013 to understand the context and issues attributed to the Auckland decline. Providers highlighted increased global competition and the decline in Korean students as being the key contributing factors of the decline these providers are experiencing.

In August 2013 the PTE sector was tracking towards a greater decline than the net position, with a 28% (-3,720) decline on the same period in 2012. However a strong September – December quarter saw a 7% (813) increase on the same period in 2012, which partially mitigated the decline from the earlier trimesters. The growth came from an increase in Japanese and Indian PTE students in this final trimester, with approximately 85% of total Japanese and Indian PTE students for the 2013 year enrolling in the September – December period.

Regulatory response:

The industry identified that work rights would help to attract students to New Zealand. Government responded by extending the work rights pilot for international students enrolled in English language schools in Christchurch to all of New Zealand.

Though a full analysis has not been carried out on the cause for the significant increase in PTE students in the final trimester, we believe it is more likely than not a consequence of the September 2013 announcement of an extension to full-time work rights for all scheduled breaks for students enrolled for one academic year[9].

In order to attract more international students to New Zealand, Immigration New Zealand is currently running a pilot programme which will ease the visa processing stage for first time students by introducing Immigration partnerships with quality education providers to enable streamlined visa processing and shared responsibilities for compliance[10].

Commentary on notable trends:

Canterbury region:

In 2012 the Canterbury region declined by 26% (-2,627) when compared to 2011. This was the biggest regional decline in 2012, both in terms of actual decline in students and percentage decline. This was the peak of the declines the region faced as a result of the earthquakes.

In early 2012 the Government allocated $5 million to assist with the recovery of the international education industry in Canterbury[11]. ENZ has invested the funding to deliver a programme of work designed to support the recovery of Canterbury's international education industry in conjunction with providers, businesses and local and central Government agencies.

[9] This applies to all tertiary education providers, regardless of their External Evaluation Rating (EER) rating.

[10] This is currently a pilot programme which will run throughout 2014. Further information can be found: http://www.immigration.govt.nz/migrant/stream/study/application/industrypartnershippilot.htm

[11] http://www.beehive.govt.nz/release/govt-boosts-international-education-support-chch

Figure 3: Sector breakdown of the number of international students in the Canterbury region, 2011 - 2013

The decline in international student numbers in the Canterbury region slowed in the first trimester of 2013 after two years of significant declines. By the second trimester international students in the Canterbury region had grown by 35%, and in the final trimester numbers grew by 50%, when compared to the same periods in 2012. The net result was an 11% increase on 2012.

All Canterbury international education sectors saw growth in 2013, with the exception of the primary school sector. The primary school sector, though showing signs of recovery, was also impacted by the decline in Korean students. The ELS sector saw the biggest increase ↑71% (706) on 2012.

Value of international education:

While there was a net decline of 1,811 students – there was a net increase of 1.3% (approximately $9.5 million) in tuition fee income from full fee-paying students. This was driven by an increase in the number of international students enrolled in higher level programmes, and in particular postgraduate level qualifications.

It is estimated that the value of international education remains at $2.6 billion for 2013[12]. Growth in tuition fee income and an increase in inflation[13] have mitigated the potential reduction in industry value, which could otherwise be expected from the 1.8% decline in the total number of international students.

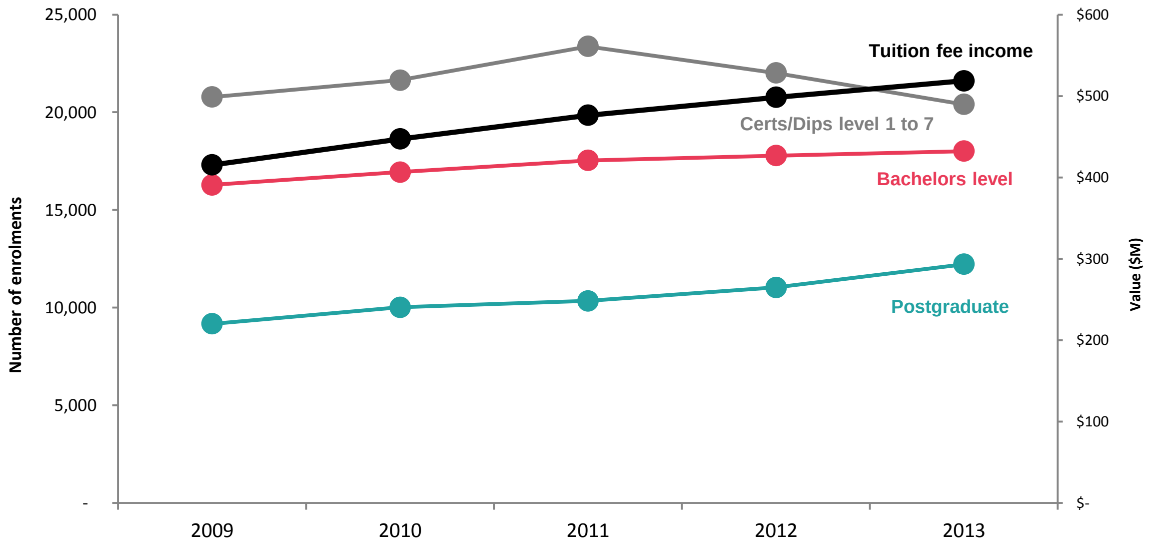
[12] The value of offshore services has not been evaluated for 2013. In the absence of a 2013 value, the 2012 value of $104 million determined by Infometrics in the Economic Impact of International Education 2012/2013 will be used until the next study in 2014/15.

[13] According to Statistics New Zealand, inflation for year ended December 2013 compared with year ended December 2012, the annual average change in the CPI was 1.15%: http://www.stats.govt.nz/browse_for_stats/economic_indicators/cpi_inflation/info-releases.aspx

Growth in postgraduate studies in Government funded tertiary providers:

There has been a consistent trend in international students focusing on quality higher education in New Zealand. There has been an average increase of 7% per annum in postgraduate enrolments between 2009 and 2013 in the Government funded tertiary sector. With a higher proportion of students enrolling in higher level qualifications, this increases the overall value of international education due to the higher fees and living costs associated with these qualifications.

Figure 4: Qualification level and value trends in Government funded tertiary providers, 2009 - 2013



The postgraduate increase has been driven by growth in PhD and Masters level enrolments, growing 51% and 41% respectively when compared to 2009. Masters level enrolments are expected to grow in 2014 with the recent release of taught Masters[14] programmes. These programmes have had high enrolment numbers globally, with New Zealand providers also experiencing strong interest.

Bachelors level qualifications have grown at a steady rate at 3% per annum since 2009. This growth however is being offset by a decline in low level qualifications which have been declining at an average of 4% per annum since 2009.

Chinese international students:

There has been steady and consistent growth from Chinese international students, ↑2% on 2012. Growth in Chinese students has been consistent in all sectors with the exception of the PTE sector where the number of Chinese students declined by 10% (-950). There has been a notable increase in Chinese students studying at postgraduate level. Notwithstanding this, there has also been an emerging trend of pre-tertiary students arriving in larger volumes than previous years.

China continues to be a key market for New Zealand's international education industry. In 2013 ENZ commissioned the development of a documentary to provide a window into Chinese students' experiences before, during and after studying in New Zealand. The 'Dragons in a Distant Land' documentary was aired in China between August and September 2013. Awareness levels of New Zealand in China showed strong signs of growth, with awareness levels increasing by 17% between April and December 2013.

[14] Also referred to as 180-point Masters and course work Masters

Global trends in international education:

International education trends in Australia[15]:

Australian international student enrolments for 2013 increased by 2.6% (13,180 enrolments) compared to 2012. This increase was driven by the English Language sector (ESOL) ↑20% (19,207). All other sectors declined or were flat with the higher education sector at 0% (1,019), the vocational education and training sector (VET) down by 6% (-9,179) and the school sector down by 4% (-710) respectively.

The overall increase was driven by Vietnamese enrolments ↑16% (3,592 enrolments), with 97% (3,481) of this increase occurring in the ESOL sector. ESOL Vietnamese enrolments increased by 78%. In-market intelligence reports that Australia continues to increase its presence in Viet Nam. There are also strong family/community ties in Australia for Vietnamese students which makes Australia a popular destination of choice.

Other increases came from Brazil ↑16% (2,464 enrolments), Colombia ↑19% (1,900), the Philippines ↑27% (1,894) and Pakistan ↑15% (1,697).

Key market declines for Australia came from more 'traditional' markets such as India (↓9%) (-4,664 enrolments), Saudi Arabia (↓7%) (-753), Indonesia (↓2%) (-306), Malaysia (↓1%) (-300) and Germany (↓1%) (-101). An observation is that Australia is looking to diversify its 'portfolio of source countries' as there was a previous strong reliance on traditional markets. This would lead to a slowing in student numbers in the short-term while Australia builds new markets.

International education trends in the United States of America (USA):

Overall international student numbers for 2012/13[16] were at record levels (↑7%) (819,644 students). Of this growth, 94% came from China (↑21%) and Saudi Arabia (↑31%), with traditional markets declining such as India (↓4%), Korea (↓2%), Japan (↓2%), Taiwan (↓6%) and Thailand (↓4%).

The increase is predominantly at undergraduate level ↑10%, with graduate level ↑4% and non-degree ↑6%.

While the growth is at record levels, the USA is heavily reliant on a few markets. When excluding China and Saudi Arabia the USA's 2012/13 results were flat (at 0.6%). Undergraduate students increased 2% and graduate numbers declined by 3%.

The USA has a strong and entrenched brand in the global international education industry. The growth from China and Saudi Arabia students appears to be linked to several key factors, one of which is the long standing international education ties between these countries. Notwithstanding this, the USA has recently invested in a digital campaign that is proving to be very popular with the Saudi Arabian market.

[15] "Australian Education International (AEI) student enrolment data generally does not represent the number of overseas students in Australia or the number of student visas issued in different countries. Instead data counts actual course enrolments." This methodology of counting students is different to how New Zealand international students have been counted in this report. This report counts the number of individual students (where possible). https://aei.gov.au/pages/default.aspx

[16] The American academic year spans from July 2012 to June 2013.

New Zealand student visa trends:

2013 academic year[17]:

Student visa data is the most immediate data available on the international education industry, as there is only a one month lag between student visas approved and Immigration New Zealand publishing the data. Student visa data is a strong indicator of whether students are remaining, leaving or entering New Zealand to study, which can be used as a predictor for future enrolment trends[18]. Similar to student enrolment trends, there was a 2% decline in student visas in 2013, which was caused by a significant decline in students during the first quarter in 2013[19].

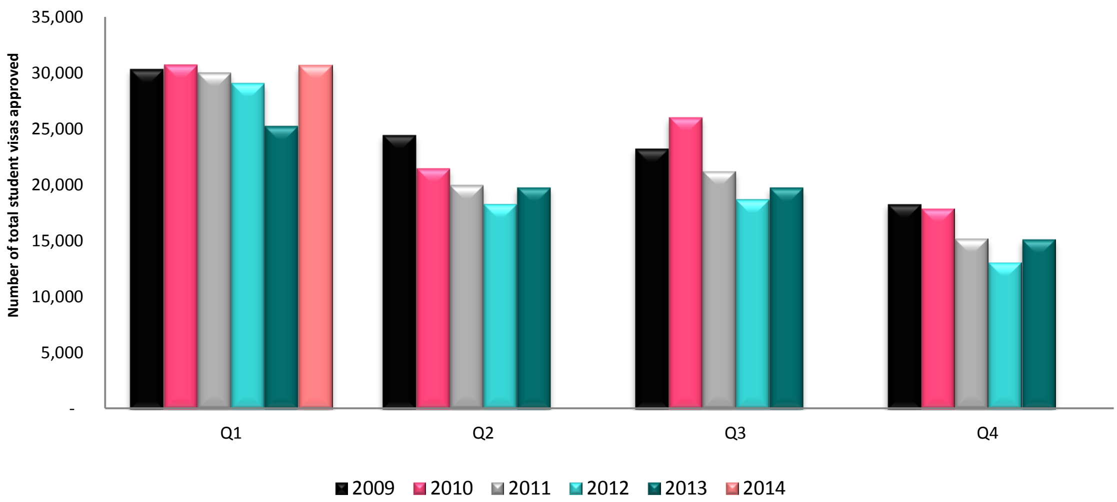
The December – March enrolment period is the most significant for the academic year, with approximately 40% of the whole year's student's visas being approved in this period. This is where the most significant decline occurred in 2013 (↓15%) (-5,178 total approved student visas), when compared to the same period in 2012. From April 2013 the decline stabilised with total student visas growing by 7% (3,335) between April and November.

Outlook for 2014

2014 student visa trends:

Given the leading indicator nature of student visa approvals and the strong increases in visa approvals seen in the period January – March 2014 (↑22% or 5,461 students over the same period in 2013), it is expected that the first trimester of 2014 should see a positive result with respect to enrolments.

Figure 5: Quarterly breakdown of total approved student visas, 2009 - 2014 (calendar years)



[17] This data was sourced from Immigration New Zealand: http://www.immigration.govt.nz/migrant/general/generalinformation/statistics/

[18] This data excludes students arriving on a visitor visas.

[19] There is a misalignment/lag between student visa statistics and student enrolments as student visas are approved, generally, a couple of months prior to a student arriving into New Zealand. Therefore student visas approved in December will be seen in student enrolment numbers in the following academic year.

Even when analysing the 2014 trends by calendar year quarters, the first quarter (Q1) of 2014 has been a very strong period for student visa approvals, ↑22% (5,461 additional total student visas (TSVs)) on Q1 2013. This is the strongest Q1 result since Q1 2010. India is the driving force behind the overall growth – with Indian TSVs for Q1 ↑75% (2,060) on the year before. This is the highest Q1 result on record for India. This growth is primarily in the PTE sector – with PTE first time student visas (FSV) ↑139% (1,216 additional FSVs).

China has also experienced growth ↑24% (1,858 TSVs). This growth is a continuation of steady growth experienced since Q2 2013. Q1 2014 is the strongest Q1 since 2002. This growth is coming from all sectors.

There has also been some steady growth coming out of ASEAN ↑14% (485 TSVs). Growth experienced by Chile and Colombia is at record levels – these students are predominantly enrolling in the PTE sector.

The Korean market appears to have bounced back and has experienced growth of 11% (247 TSVs) for Q1. These students are primarily intending to enrol at a PTE or the primary school sector. The PTE sector is experiencing significant growth, ↑75% (1,930 FSVs) for Q1.

Future trends:

International education commentators are still forecasting an increase in demand for international education globally, however at lower levels than previously predicted. Factors such as improved domestic provision, increased inter-regional student mobility and the strong growth of online provision has slowed the growth rate of international student mobility in traditional markets.

The changing and complex international environment presents new opportunities with the emergence of new markets such as Brazil, Indonesia and Chile, and new modes of delivery. These include in-market delivery, on-line delivery and new qualifications such as the taught Masters degrees which tend to have high demand due to the length and quality of the course.

New Zealand is well placed to take advantage of new opportunities in the international education industry. Education New Zealand (ENZ) is working with the New Zealand education industry through the strategic roadmaps process to develop a collective view of what success in 2025 will look like and what actions are required to achieve this success for each of their sectors.

New Zealand's international presence continues to strengthen with ENZ's on-going focus on developing relationships and business prospects in-market. The recent launch of the New Zealand Story, New Zealand Education Story and 'Think New' international education brand are also crucial in supporting New Zealand's presence in the global international education industry.

These factors, along with recent work rights changes, have begun to show strong results for New Zealand's international education industry for 2014. It is estimated that, based on student visa results for the Q1 2014, the first trimester of 2014 will see positive growth in international student numbers.

Appendix 1: Definition and breakdown of an international student:

As part of the Economic Impact of International Education 2012/2013 study, ENZ revised its definition of International students to align with international standards.

ENZ defines international students as students who are non-residents of New Zealand who:

- have entered into New Zealand expressly with the intention to study, or
- have enrolled in a New Zealand provider offshore, where the educational programme is delivered in-market.

Along with full fee-paying students, the following categories have been included when measuring the economic value and performance of international education industry[20]:

- international PhD students
- exchange students
- NZ AID students
- foreign research post graduate students
- offshore and onshore students

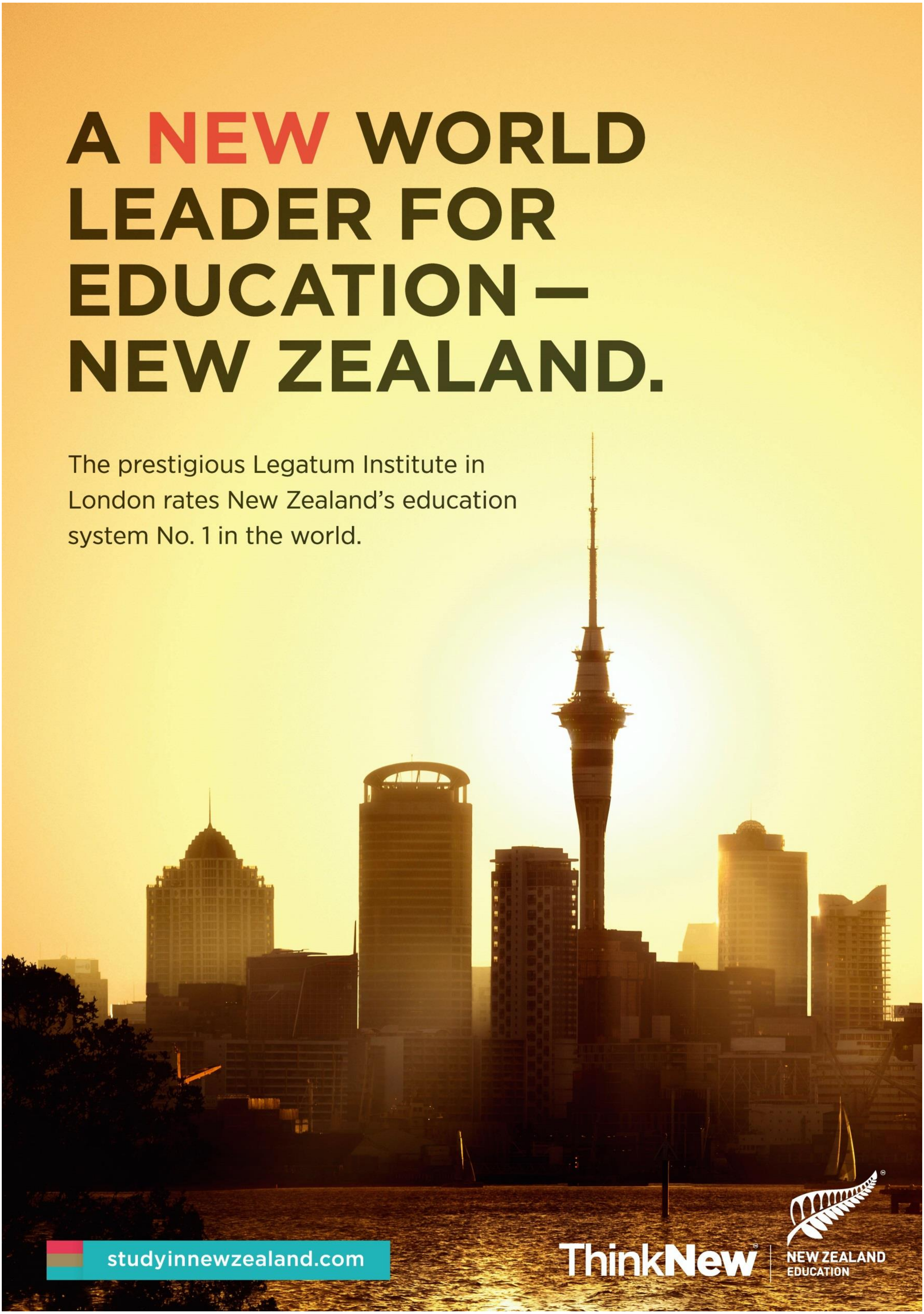
Data source and breakdown[21]:

Data source[22]	Sector	2012	2013	Change on 2012	% change
Formal qualifications: Onshore and offshore: SDR	Uni	23,501	24,375	874	3.7%
	ITPs	12,517	12,377	- 140	-1.1%
	Wānanga	-	11	11	
	SDR-PTEs	11,909	11,398	- 511	-4.3%
Full fee-paying and exchange students	Primary	2,502	2,337	- 165	-6.6%
	Secondary	14,069	14,383	314	2.2%
Export Education Levy	Non-SDR PTEs	30,505	28,073	- 2,432	-8.0%
	Subsidiaries	4,091	4,329	238	5.8%
	Total	**99,094**	**97,283**	**- 1,811**	**-1.8%**

[20] These categories are considered to be domestic students under the Education Act 1989.

[21] The Ministry of Education has revised the published number of full-fee paying international students for 2012 from 91,732 to 91,541.

[22] Data sourced from the Ministry of Education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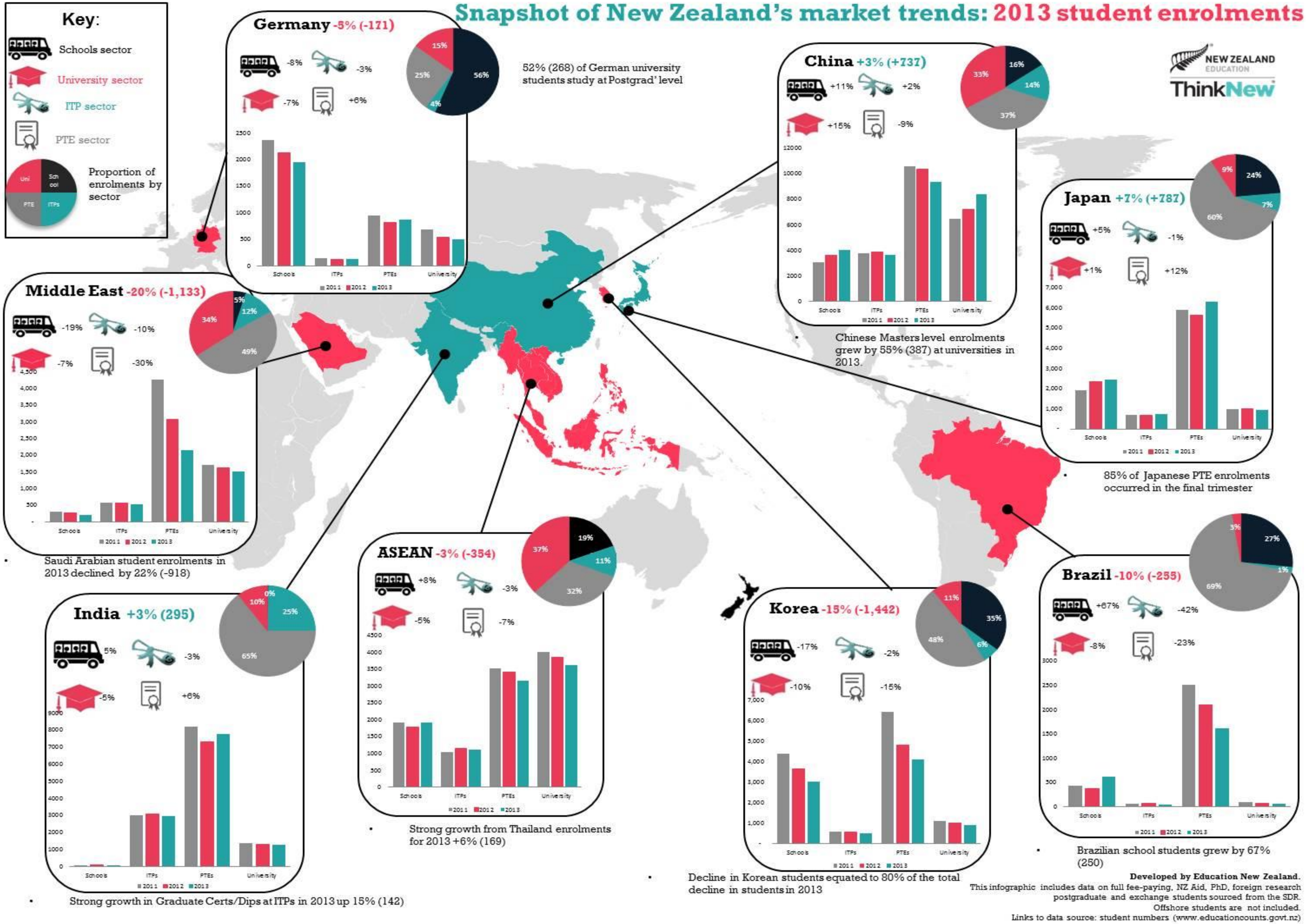

Snapshot of New Zealand's market trends: 2013 student enrolments
Key:
Schools sector
University sector
ITP sector
PTE sector
Proportion of enrolments by sector
Uni
School
PTE
ITPs
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Germany -5% (-171)
-8%
-3%
-7%
+6%
15%
25%
56%
4%
52% (268) of German university students study at Postgrad' level
Schools
ITPs
PTEs
University
2011
2012
2013
China +3% (+737)
+11%
+2%
+15%
-9%
16%
33%
14%
37%
Chinese Masters level enrolments grew by 55% (387) at universities in 2013.
Japan +7% (+787)
+5%
-1%
+1%
+12%
9%
24%
7%
60%
85% of Japanese PTE enrolments occurred in the final trimester
Middle East -20% (-1,133)
-19%
-10%
-7%
-30%
5%
12%
34%
49%
Saudi Arabian student enrolments in 2013 declined by 22% (-918)
ASEAN -3% (-354)
+8%
-3%
-5%
-7%
19%
37%
11%
32%
Strong growth from Thailand enrolments for 2013 +6% (169)
India +3% (295)
5%
-3%
-5%
+6%
0%
10%
25%
65%
Strong growth in Graduate Certs/Dips at ITPs in 2013 up 15% (142)
Korea -15% (-1,442)
-17%
-2%
-10%
-15%
11%
35%
48%
6%
Decline in Korean students equated to 80% of the total decline in students in 2013
Brazil -10% (-255)
+67%
-42%
-8%
-23%
3%
27%
69%
1%
Brazilian school students grew by 67% (250)
Developed by Education New Zealand.
This infographic includes data on full fee-paying, NZ Aid, PhD, foreign research postgraduate and exchange students sourced from the SDR.
Offshore students are not included.
Links to data source: student numbers (www.educationcounts.govt.nz)