

Aide-Memoire: TEC April 2026 Enrolment Update

To:	Hon Penny Simmonds, Minister for Tertiary Education
From:	Gillian Dudgeon, Acting Chief Executive, Tertiary Education Commission
Date:	13 July 2026
Reference:	AM-26-00780

Executive Summary

1. The TEC routinely briefs you on the volume of delivery (EFTS¹) after each Single Data Return (SDR) submission. This includes EFTS reported through the SDR and the Industry Training Register (ITR). These briefings are for your information only. This aide memoire was prepared following the April 2026 SDR².
2. Already in 2026 there is significant demand for most funds against what TEC is able to provide funding for. This paper primarily focuses on EFTS eligible for funding reported to TEC, regardless of whether the TEO has delivered or has commitments above their allocated funding. With additional funding in Budget 2026, some of the extra demand will be funded.
3. The overall number of EFTS eligible for funding increased 2% (4,709 EFTS) between April 2025 and April 2026 to 203,918 EFTS. Over the longer term, EFTS were 4% (-8,857 EFTS) lower compared to April 2021. Over this period, the delivery was highest at 212,775 EFTS in April 2021 and then declined until April 2023 when it started a slow, sustained growth.
4. The overall number of learners decreased by 1% (-5,305 learners) to 354,695 between April 2025 and April 2026. Learner numbers were 10% (-38,565 learners) lower than in April 2021.

¹ Equivalent Full-Time Student (EFTS) is the collective term being used to report on the different measures of study in the SDR (EFTS for provider-based volume of delivery) and ITR (Standard Training Measure (STM) for work-based volume of delivery). EFTS or STM represents a full-time learner workload that would normally be carried out in a single academic year (12-month period) and generally equates to 120 credits on the New Zealand Qualifications and Credentials Framework (NZQCF). Note since 2023, level 1 and 2 YG provision is the exception to EFTS reported through the SDR, with qualifications generally leading to 80 credits.

² The April 2026 data is interim and has not been finalised. Values are therefore subject to revision as data is updated. Data extracted on 22 May 2026 from the April 2026 Single Data Return (SDR) and the Industry Training Register (ITR) for the period ending 30 April 2026. EFTS and learner enrolments in this paper are cumulative and reflect all known enrolments for reporting periods April 2021 to April 2026. These figures could differ to the Ministry of Education (MoE) update due to different parameters applied and data extraction dates.

5. The overall increase in EFTS in the last year was due to strong growth in higher education and smaller growth in provider-based vocational education. Both work-based vocational education and foundation education saw declines of more than 10%.

Purpose

6. This paper provides an update on the volume of delivery (EFTS) and enrolment numbers in April 2026. It uses comparisons from April 2025 and April 2021 to give a view of longer-term trends.
7. The paper focuses on EFTS and learner numbers delivered across three provision levels:
 - a. Higher education³, which includes the delivery at Levels 7 (degree) to 10 on the New Zealand Qualifications and Credentials Framework (NZQCF) Fund (DQ7-10);
 - b. Vocational education, which includes the Delivery at Levels 3-7 (non-degree) on the NZQCF and all industry training Fund (DQ3-7); and
 - c. Foundation education, which includes the Delivery at Levels 1 and 2 on the NZQCF (DQ1-2) and Youth Guarantee Fund (YG)⁴.
8. We recommend that this aide-memoire is proactively released in full.

Changes since the last update

9. On 1 January 2026, 10 Institutes of Technology and Polytechnics (ITP) left the New Zealand Institute of Skills and Technology (NZIST): Unitec/MIT; Ara Institute; EIT; NMIT; Otago Polytechnic; SIT; Wintec; Open Polytechnic; and Toi Ohomai. Four remained within NZIST: Whitireia/WeiTec; NorthTec; WITT; and Tai Poutini.
10. The nine work-based learning (WBL) divisions also left NZIST on 1 January 2026. Two (BCITO and MITO) became standalone Private Training Establishments (PTEs) and the other seven became part of the newly established Industry Skills Boards (ISBs). Those within ISBs are expected to transition provision to a variety of providers in either 2026 or 2027.

EFTS are up and learner enrolments are down

11. The overall number of EFTS eligible for funding increased 2% (4,709 EFTS) between April 2025 and April 2026 to 203,918 EFTS, while overall learners decreased 1% (-5,305 learners). The increase in EFTS is driven mainly by higher education and with a small increase in provider-based vocational education; these increases were large enough to offset decrease in EFTS for work-based vocational and foundation education.

³ The higher education provision-level group does include a small amount of sub-degree level provision. This is based on the qualification award category (e.g., Certificate of Proficiency or Licensing) not being included in the vocational education definition. In 2026 this accounted for 3% of learners and 1% of EFTS reported in higher education.

⁴ Youth Guarantee eligibility changed in 2023. The maximum age increased to 24 years old, and the full-time study requirement was removed.

12. The following trends relate to the 12-month changes by provision-level groupings between April 2025 and April 2026:
 - a. Higher education EFTS grew 5% (6,945 EFTS) and learners 4% (6,480 learners). The average EFTS per learner slightly increased from 0.75 to 0.76, continuing the trajectory of higher EFTS per learner since April 2022.
 - b. Overall, vocational education EFTS declined by 2%, with 58,690 EFTS reported in April 2026 (-997 EFTS). The number of vocational learners enrolled declined by 5% (-9,105 learners).
 - i. Work-based vocational education enrolments continued to decline. EFTS decreased 10% (-1,354 EFTS) and learner numbers fell 11% (-8,020 learners). The large and continued decreases in work-based vocational education significantly influenced the overall trends in vocational education.
 - ii. In contrast there was growth in provider-based vocational education, with EFTS increasing 1% (358 EFTS) even as learners decreased 1% (-1,205 learners). The increase in provider-based vocational education did not offset the decline seen in work-based delivery.
13. Foundation EFTS decreased 11% (-1,240 EFTS) and learners decreased 12% (-3,130 learners) in April 2026. This is the first decrease reported since the Youth Guarantee⁴ eligibility changes in 2023, which likely drove the significant growth in foundation education in recent years. In addition, a change in the reporting approach by a wānanga who delivers a large volume of DQ 1-2 has impacted EFTS delivered (refer below).
14. All provision-level groups have experienced fluctuations in both EFTS and learner numbers year-on-year between April 2021 and April 2026.
 - a. Enrolments experienced notable increases following the introduction of several government funding initiatives in 2020 and 2021 to support the tertiary sector through COVID-19. Increased enrolments were also influenced by border restrictions and hesitation regarding overseas travel.
 - b. Between April 2022 and April 2023, Foundation Education was the only provision-level group to experience an increase as other groups saw decreases. However, since 2023 all provider-based delivery has increased while work-based delivery continues a downwards trajectory.
 - c. The overall, average EFTS per learner value across all provision-level groups has steadily increased by an average of 0.01 EFTS per learner year on year, since 2022. Meaning that learners are consuming more EFTS.
15. Across all provision, the longer-term five-year change shows the April 2026 EFTS decreased by 4% and learners decreased by 10% compared to April 2021. Work-based vocational education drove much of the decrease.
16. Tables in this paper provide April 2026 EFTS or learner enrolment numbers. The tables comprise of a year-on-year comparison between April 2025 and April 2026 and a five-year comparison between April 2021 and April 2026. Refer to the appendix for tables that show the actual delivery for each year and the year-on-year percentage changes from April 2021 to April 2026.

Table 1: April 2026 EFTS by provision-level and changes from April 2025 and April 2021

Provision-level group	2026	12 month change	5 year change	6 year trend
Higher education	134,799	5%	2%	
Vocational education: Provider-based	47,031	1%	-14%	
Vocational education: Work-based	11,658	-10%	-28%	
Total Vocational Education	58,690	-2%	-17%	
Foundation education	10,429	-11%	5%	
Total EFTS	203,918	2%	-4%	

Table 2: April 2026 learner numbers by provision-level and changes from April 2025 and April 2021

Provision-level group	2026	12 month change	5 year change	6 year trend
Higher education	176,730	4%	1%	
Vocational education: Provider-based	97,090	-1%	-12%	
Vocational education: Work-based	66,450	-11%	-33%	
Total Vocational Education	162,275	-5%	-22%	
Foundation education	22,460	-12%	22%	
Total learners	354,695	-1%	-10%	

Higher education EFTS increased across all subsectors

17. EFTS in higher education (DQ7-10) continued to grow. April 2026 saw an increase of 5% (6,945 EFTS) to 134,799 compared to April 2025. There were 176,730 learners enrolled in April 2026, which was 4% (6,480 learners) higher than April 2025. Compared to April 2021, higher education EFTS were 2% higher and learner numbers 1% higher.

Table 3: April 2026 EFTS by subsector and changes from April 2025 and April 2021 (Higher Education)

Subsector	2026	12 month change	5 year change	6 year trend
University	112,527	5%	1%	
ITP	14,988	6%	2%	
Wānanga	2,051	10%	35%	
PTE	5,233	5%	27%	
Higher Education Total EFTS	134,799	5%	2%	

18. All subsectors experienced increased EFTS in April 2026 compared to April 2025, but proportionally the University subsector accounted for the majority (81%, 5,658 EFTS) of the increase across all subsectors:

- a. Based on the number of EFTS delivered, the largest increases in higher education were at the University of Auckland (8%, 2,165 EFTS) and the University of Canterbury (8%, 1,254 EFTS). These two universities accounted for nearly half of the total growth in higher education delivery. With a minimal decline of six EFTS, Lincoln University was the only university to see a decrease in delivery.
 - b. EFTS at ITPs rose (6%, 868 EFTS) in April 2026. All ITPs reported increased EFTS ranging from less than 1% (5 EFTS) at Wintec to 91% (167 EFTS) at NorthTec. A large increase in nursing enrolments at NorthTec between April 2025 and April 2026 drove this April 2025 to April 2026 increase.
 - c. Wānanga EFTS increased by 10% (186 EFTS) between April 2025 and April 2026. Compared to April 2021 EFTS rose 35% (529 EFTS). All wānanga reported higher EFTS than in both April 2025 and April 2021, led by Te Wānanga o Raukawa up 29% on April 2025 and 110% on April 2021.
19. In April 2026, the EFTS increased across all NZQCF levels, ranging from 2% to 6%. In a longer-term comparison, EFTS at level 7 (degree) were less than 1% higher (445 EFTS) than in April 2021, while at levels 8, 9, and 10, the EFTS increased by 9%, 4%, and 8% respectively.
 20. In April 2026 EFTS increased in most subject areas when compared to April 2025. Three saw increases of more than 1,000 EFTS led by qualifications in *Society and Culture* (7%, 1,790 EFTS), followed by *Health* (8%, 1,742 EFTS), and *Management and Commerce* (8%, 1,342 EFTS).
 - a. The increase in *Health* was across multiple qualifications.
 - b. The increase in *Society and Culture* was led by university *Law*-related qualifications (830 EFTS, 10%), and *Psychology* qualifications (455 EFTS, 26%) with Victoria University of Wellington (up 167 EFTS, 24%) and University of Canterbury (up 235 EFTS, 45%).
 - c. The increase in *Management and Commerce* was driven by increased enrolments (10%, 1,203 EFTS) in Bachelor of Commerce and Bachelor of Business qualifications at universities.

Changes in vocational education EFTS were mixed

21. In April 2026, there were 58,690 EFTS enrolled in vocational education. This was a decrease of 2% (-997 EFTS) compared to April 2025. This was down 17% (-12,274 EFTS) compared to April 2021. The number of vocational education learners fell by 5% (-9,105 learners), to a total of 162,276 learners. Work-based provision contributed significantly to the overall decreases.
22. Vocational education saw large increases in 2021, and subsequently large reductions in EFTS were reported between 2022 and 2023⁵ (see Table 15 in the Appendix). Since 2023 all provider-based vocational education EFTS increased year on year, while work-based learning EFTS decreased year on year.

⁵ Growth in vocational education enrolments in 2021 was supported by the Targeted Training and Apprenticeship Fund (TTAF) that was available between July 2020 and December 2022. Vocational education provision was further supported by the Apprenticeship Boost initiative (ABI) that was introduced in April 2021. Provider-based delivery peaked in 2021 and declined in both 2022 and 2023 before increasing in 2025. Work-based delivery peaked in 2022 and has declined each year since then.

Table 4: April 2026 EFTS by provision-level group and subsector and changes from April 2025 and April 2021 (Vocational Education)

Provision-level group and Subsector	2026	12 month change	5 year change	6 year trend
Vocational education: Provider-based				
University	3,145	4%	11%	
ITP	20,315	0%	-22%	
Wānanga	10,975	0%	-8%	
PTE	12,596	1%	-10%	
Vocational: Provider-based Total	47,031	1%	-14%	
Vocational: Work-based Total	11,658	-10%	-28%	
Total Vocational EFTS	58,690	-2%	-17%	

Increases in provider-based vocational education were not enough to offset the decline in work-based provision

23. In April 2026, there were 47,031 provider-based vocational EFTS, up 1% (358 EFTS) compared to April 2025. This compares to a 10% reduction in EFTS (-1,354 EFTS) for work-based vocational education with a total of 11,658 EFTS reported over the 12-month period.
24. Provider-based EFTS increased across all subsectors between April 2025 and April 2026. Universities (107 EFTS, +4%) and PTEs (167 EFTS, +1%) accounted for more than 75% of the increase in provider-based vocational delivery (358 EFTS, 1%). ITPs and wānanga each increased by less than one half of one percent.
25. There were notably different changes across the subject areas in provider-based vocational EFTS compared to April 2025 including:
 - a. Increases from April 2025 in *Electrical Engineering* up 192 EFTS (13%); *Community Client Care* up 231 (13%); and *Veterinary Studies* up 150 EFTS (11%), led by the New Zealand Diploma in Veterinary Nursing (Level 6).
 - b. Decreases in *Building* down 436 EFTS (-15%) from April 2025 and down 2,816 EFTS (-51%) since April 2021.
 - c. *Language and Literature* down 327 EFTS (-5%) driven by a 297 EFTS (-5%) in Te Reo Māori provision.

Work-Based vocational EFTS continue to decline

26. In April 2026, there were 11,658 EFTS enrolled in work-based vocational education, this was down 10% (-1,354 EFTS) from April 2025; Apprenticeships accounted for 63% of work-based EFTS. Apprentice EFTS have declined 12% (-960 EFTS) since April 2025, and are 23% (-2,201 EFTS) lower compared to April 2021. Trainees EFTS declined 8% in the last 12 months and by 35% (-2,285 EFTS) since April 2021.

Table 5: April 2026 EFTS by learner type and changes from April 2025 and April 2021 (Work-based Vocational Education)

Learner type	2026	12 month change	5 year change	6 year trend
Apprentices	7,354	-12%	-23%	
Trainees	4,304	-8%	-35%	
Total Work-based EFTS	11,658	-10%	-28%	

27. In April 2026, there were 66,450 learners in work-based vocational education. Most learners (39,230 learners) were in apprenticeships, and 27,525 were in traineeships. The number of learners in work-based vocational education declined 11% (-8,020 learners) compared to April 2025. Since April 2021 the number of learners has declined steeply⁶. Apprenticeship learners declined by 29% (-15,890) and trainees by 39%.
28. Most subject areas saw a decline in work-based EFTS between April 2025 and April 2026, with *Architecture and Building* (-17%, -706 EFTS) and *Engineering and Related Technologies* (-9%, -413 EFTS) seeing the greatest decreases. These subject areas accounted for 63% of all work-based vocational education provision April 2026, contributing to a notable impact on work-based provision. *Architecture and Building* peaked in April 2022, and *Engineering and Related Technologies* peaked in April 2023. Each has declined annually since their peaks.

Provider-based and work-based vocational education attract different types of learners

29. There are noticeable differences between the types of learners enrolled in work-based and provider-based vocational education. Unlike work-based vocational education, which has predominantly been male (73%, 48,530 learners in April 2026), provider-based vocational education had more female learners (61%, 59,225 learners in April 2026). While the proportion of genders in provider-based and work-based vocational education remained largely unchanged over the last six year.
30. A noticeable shift in study type occurred across the last six years. Between April 2021 and April 2023, provider-based and work-based education each had about 50% of the learners⁷. Since then, provider-based has increased its share about three percentage points per year to 60% in April 2026.
31. Learner demographics within provider-based and work-based vocational education remained largely unchanged in terms of gender and age groups between April 2025 and April 2026. There were only minor shifts in the ethnicity makeup. Only Asian and Middle Eastern Latin American African ethnicities saw increases and they were both less than 1%, European, Māori, and Pacific peoples saw decrease between 5% and 7%.

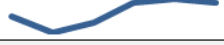
⁶ Some learners enrol as both trainees and apprentices in the same year. This may lead to the sum of percentages greater than 100%.

⁷ Some learners enrol in both work-based and provider-based in the same year. This leads to the sum of percentages greater than 100%.

Foundation education EFTS have decreased for the first time since 2022

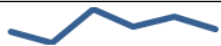
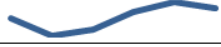
32. In April 2026, there were 10,429 EFTS enrolled in foundation education; This was down 11% (-1,240 EFTS) compared to April 2025. Compared to April 2021, foundation EFTS are up 5% (498 EFTS).
- a. Delivery in DQ1–2 accounted for nearly three quarters of foundation education EFTS. The decrease in April 2026 is largely driven by a change in reporting of the phasing of DQ1-2 by Te Wānanga o Aotearoa (TWOA). In April 2026, TWOA revised its approach to reporting EFTS. This change results in a lower proportion of EFTS being recorded in DQ1–2 in the April SDR, with the remaining proportion of EFTS being recorded in later SDR submissions. This has created an apparent decrease rather than a real change in delivery.
33. In April 2026, 22,460 learners enrolled in foundation education. This was a 12% decrease (-3,130 learners) compared to April 2025. Approximately 77% of learners are enrolled in education funded by DQ1-2 and the above reporting change by TWOA has driven this decrease. In April 2026, DQ1-2 EFTS decreased 12% (-1,088 EFTS) compared to April 2025; this was less than 1% (36 EFTS) higher when compared to the EFTS in April 2021. Youth Guarantee (YG) had a smaller decline of 5% (-151 EFTS) compared to April 2025. YG was significantly higher (20%, 463 EFTS) than in April 2021. This increase was likely driven by the change in eligibility for YG in 2023⁴.

Table 6: April 2026 EFTS by fund and changes from April 2025 and April 2021 (Foundation Education)

Fund	2026	12 month change	5 year change	6 year trend
DQ 1-2	7,622	-12%	0%	
Youth Guarantee	2,808	-5%	20%	
Total Foundation EFTS	10,429	-11%	5%	

34. All three subsectors saw declines in EFTS, led by wānanga with a 649 EFTS decline (-11%) followed by ITPs (-364 EFTS, -13%) and PTEs (-227 EFTS, -8%).
35. Te Wānanga o Aotearoa (TWOA) accounted for 96% of decline in wānanga EFTS.
36. Te Reo Māori qualifications accounted for 55% (5,724 EFTS) of foundation delivery. Most of the delivery was at wānanga (83%, 4,737 EFTS).

Table 7: April 2026 EFTS by subsector and changes from April 2025 and April 2021 (Foundation Education)

Subsector	2026	12 month change	5 year change	6 year trend
Wānanga	5,190	-11%	3%	
PTE	2,775	-8%	14%	
ITP	2,465	-13%	-1%	
Total Foundation EFTS	10,429	-11%	5%	

International EFTS increased 19% compared to last year

37. International EFTS have increased by 8% (2,155 EFTS) and international learners have increased by 9% (3,785 learners) between April 2025 and April 2026. International EFTS and international learners also increased between April 2021 and April 2026, with total international EFTS up 68% (11,770 EFTS) and learner numbers up 57% (16,635 learners).
38. EFTS increased significantly at universities and PTEs when comparing April 2025 and April 2026. Universities increased by 9% (1,663 EFTS) and PTEs increased by 12% (498 EFTS). These increases offset small declines at ITPs and wānanga which each saw declines of less than 5 EFTS.
39. In the university subsector, University of Otago had the largest percentage increase (21%, 269 EFTS) compared to April 2025. On an EFTS basis, University of Auckland has 603 more EFTS (12%).
40. In the PTE subsector over the last year, the largest increases were at Yoobee Colleges (466 EFTS, 181%) and Whitecliffe Enterprises (123 EFTS, 43%). Large declines were seen at AGI Education (-207 EFTS, -67%) and ICL Education (-166 EFTS, -17%). For ICL this comes after a significant increase between April 2024 and April 2025 (575 EFTS, 139%).
41. Compared to April 2021, international EFTS increased 68% (11,770 EFTS) with all subsectors experiencing growth. Universities accounted for 65% of the increase. Three universities saw EFTS rise by more than 1,000 over this time: University of Waikato (1,744, 152%); University of Auckland (1,702, 43%); and Massey University (1,241, 68%). Waikato and Massey growth is due to large increases in intramural overseas delivery.

Table 8: April 2026 EFTS by subsector and changes from April 2025 and April 2021 (International)

Subsector	2026	12 month change	5 year change	6 year trend
University	29,052	14%	58%	
PTE	8,813	6%	87%	
Wānanga	18	-10%	20%	
ITP	7,761	-2%	32%	
Total International EFTS	45,586	9%	57%	

Data caveats

42. The SDR data in this briefing is for enrolment reporting purposes and includes all funding related to Delivery of Qualifications on the NZQCF (formerly Student Achievement Component), Youth Guarantee, and International Fee-Paying Students.
43. The ITR data relates to learner numbers in work-based vocational education which occur throughout the year. Enrolment numbers are subject to change and are not comparable to previous years or more recent months.

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44. Enrolment figures in this briefing may differ from other published figures by TEC and MoE based on the specific purpose and focus of the information.

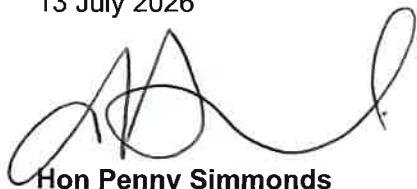
We will update you following the August 2026 SDR

45. We will provide you with an enrolment update following the August 2026 SDR.
46. We will update you on April 2026 Fees Free learner numbers in a separate briefing.



Gillian Dudgeon

Acting Chief Executive,
Tertiary Education Commission
13 July 2026



Hon Penny Simmonds

Minister for Vocational Education

21 / 07 / 2026

Appendix

Provision-level group

Table 9: Number of EFTS by provision-level group from April 2021 to April 2026

Provision-level group	EFTS delivered					
	Apr 2021	Apr 2022	Apr 2023	Apr 2024	Apr 2025	Apr 2026
Higher education	131,880	126,253	122,060	123,448	127,854	134,799
Vocational education: Provider-based	54,819	48,005	43,321	45,831	46,674	47,031
Vocational education: Work-based	16,145	17,654	16,845	14,355	13,013	11,658
Total Vocational Education	70,964	65,659	60,167	60,186	59,687	58,690
Foundation education	9,931	8,450	10,863	10,817	11,669	10,429
Total EFTS	212,775	200,361	193,090	194,451	199,209	203,918

Table 10 Year-on-year changes in EFTS by provision-level group

Provision-level group	Year-on-Year EFTS change					
	Apr 2021 to Apr 2022	Apr 2022 to Apr 2023	Apr 2023 to Apr 2024	Apr 2024 to Apr 2025	Apr 2025 to Apr 2026	Apr 2021 to Apr 2026
Higher education	-4%	-3%	1%	4%	5%	2%
Vocational education: Provider-based	-12%	-10%	6%	2%	1%	-14%
Vocational education: Work-based	9%	-5%	-15%	-9%	-10%	-28%
Total Vocational Education	-7%	-8%	0%	-1%	-2%	-17%
Foundation education	-15%	29%	0%	8%	-11%	5%
Total EFTS % Change	-6%	-4%	1%	2%	2%	-4%

Table 11: Number of learners by provision-level group from April 2021 to April 2026

Provision-level group	Number of Learners					
	Apr 2021	Apr 2022	Apr 2023	Apr 2024	Apr 2025	Apr 2026
Higher education	175,565	171,645	165,205	166,200	170,250	176,730
Vocational education: Provider-based	110,480	101,080	91,195	94,460	98,300	97,090
Vocational education: Work-based	99,060	104,350	97,440	83,035	74,470	66,450
Total Vocational Education	207,075	202,960	186,335	175,830	171,380	162,275
Foundation education	18,420	16,110	21,545	22,910	25,590	22,460
Total Learners	393,260	383,455	365,905	357,975	360,000	354,695

Table 12: Year-on-year changes in learners by provision-level group

Provision-level group	Year-on-Year Learner Change					
	Apr 2021 to Apr 2022	Apr 2022 to Apr 2023	Apr 2023 to Apr 2024	Apr 2024 to Apr 2025	Apr 2025 to Apr 2026	Apr 2021 to Apr 2026
Higher education	-2%	-4%	1%	2%	4%	1%
Vocational education: Provider-based	-9%	-10%	4%	4%	-1%	-12%
Vocational education: Work-based	5%	-7%	-15%	-10%	-11%	-33%
Total Vocational Education	-2%	-8%	-6%	-3%	-5%	-22%
Foundation education	-13%	34%	6%	12%	-12%	22%
Total Learners % Change	-2%	-5%	-2%	1%	-1%	-10%

Higher Education**Table 13: EFTS delivered by subsector from April 2021 to April 2026 (Higher Education)**

Subsector	EFTS delivered					
	Apr 2021	Apr 2022	Apr 2023	Apr 2024	Apr 2025	Apr 2026
University	111,566	107,155	102,697	103,555	106,870	112,527
ITPs	14,666	13,548	13,484	13,566	14,120	14,988
Wānanga	1,522	1,439	1,484	1,708	1,865	2,051
PTE	4,126	4,111	4,395	4,619	4,999	5,233
Total Higher Education EFTS	131,880	126,253	122,060	123,448	127,854	134,799

Table 14: Percentage change in EFTS delivered by subsector from April 2021 to April 2026 (Higher Education)

Subsector	Year-on-Year EFTS Change					
	Apr 2021 to Apr 2022	Apr 2022 to Apr 2023	Apr 2023 to Apr 2024	Apr 2024 to Apr 2025	Apr 2025 to Apr 2026	Apr 2021 to Apr 2026
University	-4%	-4%	1%	3%	5%	1%
ITPs	-8%	0%	1%	4%	6%	2%
Wānanga	-5%	3%	15%	9%	10%	35%
PTE	0%	7%	5%	8%	5%	27%
Higher Education EFTS % Change	-4%	-3%	1%	4%	5%	2%

Vocational Education**Table 15: Number of EFTS by provision-level group and subsector from April 2021 to April 2026 (Vocational Education)**

Provision-level group and Subsector	EFTS delivered					
	Apr 2021	Apr 2022	Apr 2023	Apr 2024	Apr 2025	Apr 2026
Vocational education: Provider-based						
ITP	26,067	23,193	19,684	19,843	20,269	20,315
PTE	13,940	12,261	10,731	12,162	12,429	12,596
Wānanga	11,982	10,019	10,460	10,999	10,938	10,975
University	2,831	2,531	2,447	2,827	3,038	3,145
Vocational: Provider-based Total	54,819	48,005	43,321	45,831	46,674	47,031
Vocational: Work-based Total	16,145	17,654	16,845	14,355	13,013	11,658
Total Vocational EFTS	70,964	65,659	60,167	60,186	59,687	58,690

Table 16: Percentage change in EFTS delivered by provision-level group and subsector from April 2021 to April 2026 (Vocational Education)

Provision-level group and Subsector	Year-on-Year EFTS Change					
	Apr 2021 to Apr 2022	Apr 2022 to Apr 2023	Apr 2023 to Apr 2024	Apr 2024 to Apr 2025	Apr 2025 to Apr 2026	Apr 2021 to Apr 2026
Vocational education: Provider-based						
ITP	-11%	-15%	1%	2%	0%	-22%
PTE	-12%	-12%	13%	2%	1%	-10%
Wānanga	-16%	4%	5%	-1%	0%	-8%
University	-11%	-3%	16%	7%	4%	11%
Vocational: Provider-based Total	-12%	-10%	6%	2%	1%	-14%
Vocational: Work-based Total	9%	-5%	-15%	-9%	-10%	-28%
Vocational EFTS % Change	-7%	-8%	0%	-1%	-2%	-17%

Table 17: EFTS delivered by learner type from 2021 to 2026 (Work-Based Vocational Education)

Learner Type	EFTS delivered					
	Apr 2021	Apr 2022	Apr 2023	Apr 2024	Apr 2025	Apr 2026
Apprentices	9,556	11,157	10,917	9,666	8,314	7,354
Trainees	6,589	6,498	5,929	4,689	4,699	4,304
Total Work-based EFTS	16,145	17,654	16,845	14,355	13,013	11,658

Table 18: Year-on-year changes in EFTS by learner type (Work-Based Vocational Education)

Learner Type	Year-on-Year EFTS Change					
	Apr 2021 to Apr 2022	Apr 2022 to Apr 2023	Apr 2023 to Apr 2024	Apr 2024 to Apr 2025	Apr 2025 to Apr 2026	Apr 2021 to Apr 2026
Apprentices	17%	-2%	-11%	-14%	-12%	-23%
Trainees	-1%	-9%	-21%	0%	-8%	-35%
Vocational EFTS % Change	9%	-5%	-15%	-9%	-10%	-28%

Foundation Education**Table 19: EFTS delivered by fund from April 2021 to April 2026 (Foundation Education)**

Fund	EFTS delivered					
	Apr 2021	Apr 2022	Apr 2023	Apr 2024	Apr 2025	Apr 2026
DQ 1-2	7,586	6,699	8,734	8,007	8,710	7,622
Youth Guarantee	2,345	1,750	2,129	2,810	2,959	2,808
Total Foundation EFTS	9,931	8,450	10,863	10,817	11,669	10,429

Table 20: Year-on-year changes in EFTS by learner type (Foundation Education)

Learner Type	Year-on-Year EFTS Change					
	Apr 2021 to Apr 2022	Apr 2022 to Apr 2023	Apr 2023 to Apr 2024	Apr 2024 to Apr 2025	Apr 2025 to Apr 2026	Apr 2021 to Apr 2026
DQ 1-2	-12%	30%	-8%	9%	-12%	0%
Youth Guarantee	-25%	22%	32%	5%	-5%	20%
Foundation EFTS % Change	-15%	29%	0%	8%	-11%	5%

International**Table 21: EFTS delivered by subsector from April 2021 to April 2026 (International)**

Subsector	EFTS delivered					
	Apr 2021	Apr 2022	Apr 2023	Apr 2024	Apr 2025	Apr 2026
University	11,632	9,624	13,267	14,717	17,612	19,275
ITP	3,067	1,689	3,214	4,455	4,974	4,969
PTE	2,613	1,319	1,647	3,016	4,331	4,829
Wānanga	6	3	2	10	16	14
Total International EFTS	17,318	12,635	18,131	22,199	26,932	29,088

Table 22: Year-on-year changes in EFTS by subsector (International)

Subsector	Year-on-Year EFTS Change					
	Apr 2021 to Apr 2022	Apr 2022 to Apr 2023	Apr 2023 to Apr 2024	Apr 2024 to Apr 2025	Apr 2025 to Apr 2026	Apr 2021 to Apr 2026
University	-17%	38%	11%	20%	9%	66%
ITP	-45%	90%	39%	12%	0%	62%
PTE	-50%	25%	83%	44%	12%	85%
Wānanga	-49%	-36%	434%	52%	-7%	146%
International EFTS % Change	-27%	43%	22%	21%	8%	68%