

Tertiary Education Report: August 2019 Enrolment Update

Date:	20 November 2019	TEC priority:	Medium
Security level:	In Confidence	Report no:	B/19/01339
		Minister's office No:	

ACTION SOUGHT		
	Action sought	Deadline
Hon Chris Hipkins Minister of Education	<p>Note the sector's enrolment data following the August 2019 SDR;</p> <p>Note the TEC has provided data for fees-free in a separate briefing [B/19/01340];</p> <p>Note that the TEC will publish enrolment data in December; and</p> <p>Agree for the TEC to proactively release this briefing in due course.</p>	At your earliest convenience
Enclosure: No	Round Robin: No	

CONTACT FOR TELEPHONE DISCUSSION (IF REQUIRED)			
Name	Position	Telephone	1st contact
Gillian Dudgeon	Deputy Chief Executive, Delivery	Section 9(2)(a)	✓

THE FOLLOWING DEPARTMENTS/AGENCIES HAVE SEEN THIS REPORT

- DPMC
 MPI
 ENZ
 ERO
 MBIE
 MoE
 MFAT
 MPP
 MSD
 NZQA
 NZTE
 TEC
 TPK
 Treasury

- Minister's Office to Complete:**
- | | |
|---|--|
| <input type="checkbox"/> Approved | <input type="checkbox"/> Declined |
| <input type="checkbox"/> Noted | <input type="checkbox"/> Needs change |
| <input type="checkbox"/> Seen | <input type="checkbox"/> Overtaken by Events |
| <input type="checkbox"/> See Minister's Notes | <input type="checkbox"/> Withdrawn |

Comments:

Recommendations

Hon Chris Hipkins, Minister of Education

It is recommended that you:

1. **note** the sector’s enrolment data following the August 2019 SDR;
2. **note** the TEC has provided data for fees-free in a separate briefing [B/19/01340];
3. **note** that the TEC will publish the enrolment data in December; and
4. **agree** for the TEC to proactively release this briefing in due course.

AGREED / NOT AGREED



Gillian Dudgeon

Deputy Chief Executive, Delivery
Tertiary Education Commission

25 November 2019

Hon Chris Hipkins

Minister of Education

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Purpose

1. This paper provides you with an update of enrolments as at August 2019 for the Student Achievement Component (SAC), Youth Guarantee (YG) and Industry Training (ITF) funds. It compares these enrolments to the same period in 2018. Enrolments from Open Polytechnic have been excluded from this report for 2018 and 2019. This is due to Open Polytechnic needing to resubmit its August 2019 SDR due to data issues.
2. Appendix A provides data tables for the SAC and YG funds.
3. Appendix B provides data tables for the ITF.
4. Some data provided in this briefing may differ to that in AM-19-01317 due to the date of extraction and the way the data has been defined. Therefore the data is not directly comparable.

Overall SAC level 3 and above enrolments are stable, but declines continue for Institutes of Technology and Polytechnics

5. Total SAC level 3 and above enrolments in August 2019 were down by 898 EFTS (-0.5%) and 1,674 students (-0.6%) compared to August 2018.
6. As shown in Table 1, the decline was primarily due to lower enrolments at institutes of technology and polytechnics (ITPs), which decreased by 2,053 EFTS (-4.7%) and 3,939 students (-5.5%). While the volume of delivery at wānanga decreased by 191 EFTS (-1.1%), enrolments increased by 447 students (1.6%).
7. The decline in EFTS at ITPs and wānanga was partially offset by increased enrolments at universities, which grew by an additional 591 EFTS (0.5%) and 276 students (0.2%).
8. There was also an increase in enrolments at private training establishments (PTEs), but this was mainly due to a reporting change caused by the Mind Lab separating from Unitec New Zealand (Unitec) to become its own PTE.

Table 1: SAC level 3 and above enrolments

	August 2019		August 2018		Change			
	EFTS	Students	EFTS	Students	EFTS	%	Students	%
ITP ¹	41,385	67,592	43,438	71,531	-2,053	-4.7%	-3,939	-5.5%
Wānanga	16,794	28,122	16,985	27,675	-191	-1.1%	447	1.6%
University	114,389	146,935	113,798	146,659	591	0.5%	276	0.2%
PTE ²	19,350	32,584	18,595	31,070	755	4.1%	1,514	4.9%
Total³	191,918	270,146	192,816	271,820	-898	-0.5%	-1,674	-0.6%

¹ Figures exclude Open Polytechnic as it intends to resubmit its August 2019 SDR data.

² PTE enrolments appear to increase, but this is primarily due to a reporting change with the Mind Lab becoming its own PTE. The Mind Lab reported 317 EFTS and 722 learners in the August 2019 SDR.

³ The total student count is based on the total number of unique students (using their National Student Number), rather than the sum of the student figures, as students can study at more than one provider and/or can study one or more qualifications.

Universities

9. The small net growth in university enrolments was due to increases at the University of Canterbury (UC) and Massey University (Massey). UC had approximately 5% more enrolments (622 EFTS and 718 students) in August 2019 than it had in August 2018. Since 2015 enrolments at Massey have been declining, however as at August 2019 Massey's enrolments had increased between 1.5% to 1.9% (280 EFTS and 369 learners) across a range of qualifications and levels when compared to August 2018.
10. Three universities had lower enrolments in August 2019 than in August 2018. The University of Auckland's enrolments decreased by 209 EFTS (-0.7%) and 293 students (-0.8%). Victoria University of Wellington's enrolments fell slightly by 20 EFTS (-0.1%) and 219 students (-1.1%). Lincoln University's enrolments continue to decline across all levels of delivery. As at August 2019, its enrolments were down by 128 EFTS (-7.3%) and 161 students (-7.6%).

Institutes of Technology and Polytechnics

11. ITP enrolments declined by 4.7% (-2,053 EFTS) due to falling enrolments at nine of the 15 ITPs (excluding Open Polytechnic). The largest decreases occurred at Unitec and Tai Poutini Polytechnic (TPP).
- Unitec had 1,017 fewer EFTS (-18.2%) and 1,937 fewer students (-21.2%). The decline can partially be attributed to the separation of the Mind Lab into a separate PTE, which caused enrolments to drop. However, there were also fewer enrolments across a range of level 6 and 7 qualifications.
 - TPP had a 68.4% decrease in EFTS (-414) and a 63.9% decrease in the number of students (-721). A range of factors contributed to the fall in enrolments (B-19-00882 refers), such as cessation of teaching outside the West Coast and transfer of delivery to another provider (e.g. scaffolding delivery being transferred to industry training organisations).
12. Enrolments at Nelson Marlborough Institute of Technology, Waikato Institute of Technology, Wellington Institute of Technology, Universal College of Learning, NorthTec, Toi Ohomai Institute of Technology and Whitireia New Zealand decreased across a range of qualifications and levels.

Wānanga

13. SAC level 3 and above delivery volumes in the wānanga sector decreased slightly by 191 EFTS (-1.1%), but the number of students increased by 447 (1.6%). The decrease in EFTS was due to falling enrolments at Te Wānanga O Aotearoa (TWoA) (412 fewer EFTS or -3.0%) and Te Whare Wānanga O Awanuiārangi (221 fewer EFTS or -13.5%).
14. The overall increase in students was due to 53% (1,696) more students at Te Wānanga O Raukawa (TWoR). The increase was mainly attributed to their free⁴ online language programme, Poupou Huia Te Reo, which more than doubled its enrolments from 1,687 students in August 2018 to 3,541 students in August 2019.

Foundation education enrolments continue to decline

15. Foundation education enrolments continue to fall. YG enrolments decreased by 880 EFTS (-16.5%) and 1,297 students (-15.0%). SAC levels 1 and 2 enrolments decreased by 796 EFTS (-8.6%) and 1,678 students (-10.2%).

⁴ Poupou Huia Te Reo (Certificate in Māori Protocol and Language for use in the Home) is free to citizens, permanent residents and domestic students of Aotearoa, New Zealand. This includes New Zealand citizens living outside of Aotearoa, New Zealand. Fees apply for non-New Zealand citizens.

16. The decrease in YG enrolments at level 3 was partly due to students (aged under 20) choosing to use their fees-free entitlement to enrol in SAC funded programmes.
17. The drop in SAC levels 1 and 2 enrolments was primarily at TWoA, which had 656 fewer EFTS (-12.3%) and 1,325 learners (-19.5%). The decrease may be due, in part, to TWoA deciding to stop delivering some unit standards and programmes due to moderation issues.
18. However, SAC levels 1 and 2 enrolments at ITPs increased by 84 EFTS (4.2%) and 263 students (5.6%).

Apprenticeships at ITOs are growing

19. Between August 2018 and August 2019 the industry training sector has experienced an increase of 521 (1.8%) standard training measures (STMs) and a decrease of 1,099 (-1.0%) learners.
20. The overall increase in STMs was due to a rise in apprenticeships⁵, which increased by 1,283 STMs (10.0%) and 2,698 learners (6.5%). The growth was primarily in BCITO's carpentry programme, and a rise in learners in the Skills Organisation's electrical engineering and trades certificates.
21. Enrolments in traineeships decreased by 762 STMs (-4.5%) and 4,193 learners (-5.8%). The decrease was caused by the continued decline in level 2 qualifications, which dropped by 24% (-811 STMs and -4,633 learners) compared to August 2018. Some of this decrease occurred at Primary ITO as it has reduced training at lower levels.
22. All enrolments at Careerforce also declined by 31 STMs (-0.8%). Most of the decrease was in level 2 and level 4 care and support qualifications. This decrease is expected as enrolments in care and support qualifications peaked after the Care and Support (Pay Equity) Settlement Act 2017 came into force in mid-2017 and linked Care and Support worker pay rates to qualifications.

Table 2: Industry Training Fund enrolment by learner type

	August 2019		August 2018		Change			
	STM	Learners	STM	Learners	STM	%	Learners	%
Trainees	16,141	67,664	16,902	71,857	-762	-4.5%	-4,193	-5.8%
Apprentices	14,096	43,935	12,814	41,237	1,283	10.0%	2,698	6.5%
Total^{3,6}	30,237	110,473	29,716	111,572	521	1.8%	-1,099	-1.0%

Differences between data in this briefing and data the TEC publishes

23. We publish high-level sector and individual TEO SDR enrolment data after each reporting period. The TEC does this for transparency of funding purposes; accordingly, we present the data by funding streams and EFTS consumed as they relate to funding.
24. The SDR data in this briefing is for enrolment reporting purposes and includes all funding streams that are related to YG and SAC⁷. Enrolment figures in this briefing compared to the enrolment by funding stream figures published on the TEC website will differ based on the approaches used to extract the data.

⁵ Based on the number of unique learners funded as Modern Apprentices and New Zealand Apprentices.

⁶ Due to rounding of the figures the totals may not add up exactly to the underlying values.

⁷ Includes SAC level 3 and above which contains aggregate data for the following funds: SAC level 3 and above, SAC levels 3 and 4 Competitive funding, Māori and Pasifika Trades Training levels 3 and 4 and ICT Graduate Schools.

25. Enrolments at ITOs can fluctuate during the year, and ITOs rely on rolling enrolments rather than a surge at the start of the year. While training levels may be down by individual ITO on this same time last year, enrolment levels can change at any stage.

We will continue to update you on 2019 enrolments after the December 2019 SDR

26. In early 2020, we will provide you with final data for the full 2019 year following the December SDR. At the same time, we will provide you with updated fees-free enrolment data.

Appendix A: Data tables for SAC funds and Youth Guarantee (excluding Open Polytechnic)

SAC levels 1 and 2

	August 2019		August 2018		Change			
	EFTS	Students	EFTS	Students	EFTS	%	Students	%
Wānanga	4,881	7,094	5,517	8,415	-636	-11.5%	-1,321	-15.7%
PTE	1,541	2,722	1,785	3,382	-244	-13.7%	-660	-19.5%
ITP	2,078	4,949	1,994	4,686	84	4.2%	263	5.6%
Total³	8,500	14,693	9,296	16,371	-796	-8.6%	-1,678	-10.2%

Youth Guarantee⁸

	August 2019		August 2018		Change			
	EFTS	Students	EFTS	Students	EFTS	%	Students	%
ITP ¹	1,192	1,828	1,396	2,221	-204	-14.6%	-393	-17.7%
PTE	3,203	5,465	3,692	6,102	-489	-13.2%	-637	-10.4%
School	5	18	8	28	-3	-37.5%	-10	-35.7%
Wānanga	49	72	233	369	-184	-79.0%	-297	-80.5%
Total³	4,449	7,321	5,329	8,618	-880	-16.5%	-1,297	-15.0%

⁸ The Youth Guarantee figures have not been adjusted to account for the redefinition of an EFTS to 100 credits. The TEC has only applied this definition for the purposes of funding, not reporting.

Tertiary Education Institutions (TEIs) - SAC level 3 and above

TEI name	August 2019		August 2018		Change			
	EFTS	Students	EFTS	Students	EFTS	%	Students	%
Ara Institute of Canterbury	5,468	9,076	5,129	9,046	339	6.6%	30	0.3%
Eastern Institute of Technology	2,919	4,898	2,895	4,723	24	0.8%	175	3.7%
Manukau Institute of Technology	3,092	5,139	2,988	4,986	104	3.5%	153	3.1%
Nelson Marlborough Institute of Technology	1,593	3,149	1,825	3,465	-232	-12.7%	-316	-9.1%
NorthTec	1,478	2,613	1,597	2,679	-119	-7.5%	-66	-2.5%
Otago Polytechnic	3,939	5,415	3,647	5,200	292	8.0%	215	4.1%
Southern Institute of Technology	3,394	6,691	3,366	6,694	28	0.8%	-3	0.0%
Tai Poutini Polytechnic	191	408	605	1,129	-414	-68.4%	-721	-63.9%
Toi Ohomai Institute of Technology	3,945	6,698	4,171	6,835	-226	-5.4%	-137	-2.0%
Unitec New Zealand	4,566	7,186	5,583	9,123	-1,017	-18.2%	-1,937	-21.2%
Universal College of Learning	2,452	3,583	2,651	3,831	-199	-7.5%	-248	-6.5%
Waikato Institute of Technology	3,554	6,285	3,934	7,046	-380	-9.7%	-761	-10.8%
Wellington Institute of Technology	1,998	2,911	2,189	3,104	-191	-8.7%	-193	-6.2%
Western Institute of Technology at Taranaki	869	1,459	847	1,446	22	2.6%	13	0.9%
Whitireia Community Polytechnic	1,927	2,472	2,012	2,661	-85	-4.2%	-189	-7.1%
Total ITPs^{1,3}	41,385	67,592	43,438	71,531	-2,053	-4.7%	-3,939	-5.5%
Auckland University of Technology	16,104	21,777	16,112	22,108	-8	0.0%	-331	-1.5%
Lincoln University	1,629	1,947	1,757	2,108	-128	-7.3%	-161	-7.6%
Massey University	15,191	25,240	14,911	24,871	280	1.9%	369	1.5%
University of Auckland	28,317	35,246	28,526	35,539	-209	-0.7%	-293	-0.8%
University of Canterbury	12,630	15,287	12,008	14,569	622	5.2%	718	4.9%
University of Otago	16,858	18,661	16,826	18,608	32	0.2%	53	0.3%
University of Waikato	8,098	10,550	8,077	10,600	21	0.3%	-50	-0.5%
Victoria University of Wellington	15,561	19,330	15,581	19,549	-20	-0.1%	-219	-1.1%
Total Universities³	114,389	146,935	113,798	146,659	591	0.5%	276	0.2%
Te Wānanga O Aotearoa	13,383	21,060	13,795	21,999	-412	-3.0%	-939	-4.3%
Te Wānanga O Raukawa	1,994	4,898	1,552	3,202	442	28.5%	1,696	53.0%
Te Whare Wānanga O Awanuiārangi	1,417	2,657	1,638	2,938	-221	-13.5%	-281	-9.6%
Total Wānanga³	16,794	28,122	16,985	27,675	-191	-1.1%	447	1.6%
Total TEIs^{1,3}	172,568	239,729	174,221	242,727	-1,653	-0.9%	-2,998	-1.2%

Appendix B: Data tables for Industry Training Fund

Industry Training Fund by Learner type and level

	August 2019		August 2018		Change			
	STM	Learners	STM	Learners	STM	%	Learners	%
Industry Trainees Level 1	0	S 9(2)(a)	2	17	-2	-82.0%	S 9(2)(a)	-94.1%
Industry Trainees Level 2	2,569	12,751	3,380	17,384	-811	-24.0%	-4,633	-26.7%
Industry Trainees Level 3	8,714	37,667	8,661	37,851	53	0.6%	-184	-0.5%
Industry Trainees Level 4	3,812	15,601	3,806	16,110	6	0.2%	-509	-3.2%
Industry Trainees Level 5	814	3,112	824	2,881	-10	-1.2%	231	8.0%
Industry Trainees Level 6	226	718	220	692	6	2.8%	26	3.8%
Industry Trainees Level 7	5	S 9(2)(a)	9	20	-4	-42.9%	S 9(2)(a)	-45.0%
Apprenticeships	14,096	43,935	12,814	41,237	1,283	10.0%	2,698	6.5%
Total^{3,6}	30,237	110,473	29,716	111,572	521	1.8%	-1,099	-1.0%

Industry Training Fund by Industry Training Organisation (ITO)

ITO Name	August 2019		August 2018		Change			
	STM	Learners	STM	Learners	STM	%	Learners	%
BCITO	4,951	15,751	4,440	14,525	511	11.5%	1,226	8.4%
Careerforce	3,660	14,264	3,691	15,530	-31	-0.8%	-1,266	-8.2%
Competenz	3,543	14,092	3,393	13,503	150	4.4%	589	4.4%
Connexis	1,298	4,532	1,299	5,217	-1	-0.1%	-685	-13.1%
HITO	390	1,313	374	1,326	17	4.4%	-13	-1.0%
MITO	1,803	5,721	1,674	5,472	129	7.7%	249	4.6%
NZMAC ITO	160	567	147	569	12	8.4%	-2	-0.4%
Primary ITO	3,802	15,872	4,119	17,187	-317	-7.7%	-1,315	-7.7%
ServicIQ	2,915	12,716	2,750	12,677	165	6.0%	39	0.3%
Skills Active Aotearoa	1,298	5,064	1,175	5,139	123	10.5%	-75	-1.5%
The Skills Organisation	6,301	21,082	6,149	19,727	153	2.5%	1,355	6.9%
Total ITOs^{3,6}	30,121	110,066	29,210	109,581	911	3.1%	485	0.4%
Employers in direct funding								
Fletcher Building Holdings	97	356	149	517	-51	-34.5%	-161	-31.1%
Vodafone New Zealand	1	1	1	1	-	0.0%	-	0.0%
Ryman Healthcare	0	1	0	1	-	0.0%	-	0.0%
Southern Group Training Trust	16	85	49	160	-34	-68.5%	-75	-46.9%
St John New Zealand	2	42	307	1,380	-305	-99.2%	-1,338	-97.0%
Total Direct Funding Organisations^{3, 6,9}	116	485	506	2,059	-390	-77.1%	-1,574	-76.4%
Total^{3,6}	30,237	110,473	29,716	111,572	521	1.8%	-1,099	-1.0%

⁹ The Direct Funding Scheme is for employers to be funded through the Industry Training Fund without needing to enrol learners through an ITO. The Scheme is not accepting any new employers.