



Tertiary Education Report: December 2019 Enrolment Update

Date:	15 June 2020	TEC priority:	Low
Security level:	In Confidence	Report no:	B/20/00276
		Minister's office No:	

ACTION SOUGHT

	Action sought	Deadline
Hon Chris Hipkins Minister of Education	<p>Note the sector's enrolment data following the December 2019 SDR;</p> <p>Note the TEC has provided data for fees-free in a separate briefing [B/20/00275];</p> <p>Note the TEC will publish enrolment data in August; and</p> <p>Agree for the TEC to proactively release this briefing in due course.</p>	At your earliest convenience
Enclosure: Yes/No	Round Robin: No	

CONTACT FOR TELEPHONE DISCUSSION (IF REQUIRED)

Name	Position	Telephone	1st contact
Gillian Dudgeon	Deputy Chief Executive, Delivery	s9(2)(a) [REDACTED] s9(2)(a) [REDACTED]	✓

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 Withdrawn |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 December 2019 SDR;
2. **note** the TEC has provided data for fees-free in a separate briefing [B/20/00275];
3. **note** the TEC will publish the enrolment data in August; 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

15 June 2020



Hon Chris Hipkins

Minister of Education

01 / 07 / 2020

Purpose

1. This paper provides you with an update of enrolments as at December 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.
2. Appendix A provides data tables for the SAC and YG funds.
3. Appendix B provides data tables for the ITF.

Summary

4. SAC level 3 and above enrolments are stable between December 2018 and December 2019.
5. Lower level enrolments (SAC levels 1 and 2 and Youth Guarantee) have dropped.
6. Overall enrolments in industry training are steady; apprenticeship enrolments increased while traineeships decreased.

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

7. Total SAC level 3 and above enrolments in December 2019 were down by 1,845 EFTS (-0.9%) and 2,845 students (-0.9%) compared to December 2018.
8. As shown in Table 1, the decline was primarily due to lower enrolments at institutes of technology and polytechnics (ITPs), which decreased by 2,535 EFTS (-5.0%) and 4,365 students (-4.3%). While the enrolments at wānanga decreased by 800 EFTS (-4.5%), student numbers declined by 630 (-2.2%).
9. The decline in EFTS at ITPs and wānanga was partially offset by increased enrolments at private training establishments (PTEs), which grew by an additional 1,060 EFTS (5.2%) and 1,965 students (5.6%).
10. There was also a small increase in enrolments at universities, which grew by an additional 430 EFTS (0.4%) and 85 students (0.1%).

Table 1: SAC level 3 and above enrolments

	December 2018		December 2019		Change			
	EFTS	Students	EFTS	Students	EFTS	%	Students	%
ITP	50,240	100,460	47,705	96,095	-2,535	-5.0%	-4,365	-4.3%
PTE	20,205	35,315	21,265	37,280	1,060	5.2%	1,965	5.6%
University	115,445	148,660	115,875	148,745	430	0.4%	85	0.1%
Wānanga	17,610	29,280	16,810	28,650	-800	-4.5%	-630	-2.2%
Total^{1 2}	203,500	305,910	201,655	303,065	-1,845	-0.9%	-2,845	-0.9%

¹ Students can be double counted when they are studying at more than one provider and/or at more than one qualification level. The totals in the SAC tables removes double counted students. Therefore, the student numbers in each of these tables do not equal the totals in the tables.

² All values have been rounded. Due to rounding of the figures the totals may not add up exactly to the underlying values.

Universities

11. The small net growth in university enrolments was due to increases at the University of Canterbury (UC) and Massey University (Massey). UC had 5% more enrolments by EFTS (615 EFTS) and 4.7% more students (705 students) in December 2019 than it had in December 2018. Massey's enrolments increased 1.1% by EFTS (165 EFTS) and 0.6% by students (165 students) across a range of qualifications and levels when compared to December 2018.
12. Four universities had lower enrolments in December 2019 than in December 2018. The University of Auckland's enrolments decreased by 105 EFTS (-0.4%) and 170 students (-0.5%). University of Waikato enrolments fell by 185 EFTS (-2.2%) and 130 students (-1.2%). Lincoln University's enrolments were down by 130 EFTS (-7.2%) and 165 students (-7.7%). The University of Otago had a slight decrease of enrolments of 3 EFTS but an overall increase of 30 students.

Institutes of Technology and Polytechnics

13. ITP enrolments declined by 5% (-2,535 EFTS) due to falling enrolments at 11 of the 16 ITPs. The largest decreases occurred at Unitec and Tai Poutini Polytechnic (TPP).
- Unitec had 1,120 fewer EFTS (-19.6%) and 2,700 fewer students (-27.1%). 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 levels and qualifications.
 - TPP had a 66.7% decrease in EFTS (-400) and a 64.3% decrease in the number of students (-775). 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).
14. Enrolments at Ara Institute of Canterbury, Nelson Marlborough Institute of Technology, Waikato Institute of Technology, Southern 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. More detail can be found in Appendix A.

Wānanga

15. SAC level 3 and above delivery volumes in the wānanga sector decreased by 800 EFTS (-4.5%), and 630 fewer students (-2.2%). The decrease in EFTS was due to falling enrolments at Te Wānanga O Aotearoa (TWOA) (560 fewer EFTS or -4.0%). Te Whare Wānanga O Awanuiārangi reported 300 fewer EFTS (-14.4%), largely at level 4 and 5 Te Reo and Tikanga related qualifications.
16. Te Wānanga O Raukawa (TWO R) increased overall enrolments by 55 EFTS (3.4%) and 515 students (14.9%) between December 2019 and December 2018.
- In the August 2019 enrolment update (B-19-01339) we reported an increase in TWO R enrolments attributed to their free online language programme, Poupou Huia Te Reo³ which more than doubled its enrolments from 1,690 students in August 2018 to 3,540 students in August 2019.
 - A significant proportion of these additional enrolments (890 students) were not reported as part of TWO R's December SDR submission, resulting in a smaller than expected increase

³ 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.

in the number of EFTS and students. These students were not reported as withdrawing from the course. It is not uncommon for this to occur with programmes being delivered online where internet and device access is required. TWR's funding in relation to this course is assessed as part of the standard funding reconciliation process and will be recovered where appropriate.

Foundation education enrolments continue to decline

17. Foundation education enrolments continue to fall. YG enrolments decreased by 1,010 EFTS (-16.5%) and 1,385 students (-14.0%). SAC levels 1 and 2 enrolments decreased by 870 EFTS (-8.5%) and 2,115 students (-10.4%).
18. The decrease in YG enrolments at level 3 is likely due to the combination of a reduction of the 18-24 year old cohort, continued increased competition from the labour market and students (aged under 20) choosing to use their fees-free entitlement to enrol in SAC funded programmes.
19. The drop in SAC levels 1 and 2 enrolments was primarily at TWA, which had 705 fewer EFTS (-13.0%) and 1,430 learners (-17.1%). This was due to TWA stopping the delivery of foundation and creative arts programmes in 2019 and decreased enrolments in Te Reo programmes.
20. However, SAC levels 1 and 2 enrolments at ITPs increased slightly by 70 EFTS (2.7%) and 20 students (0.3%).

Apprenticeships at ITOs are growing

21. Between December 2018 and December 2019 the industry training sector has experienced an increase of 95 (0.2%) standard training measures (STMs) and a decrease of 265 (-0.2%) learners.
22. The overall increase in STMs was due to a rise in apprenticeships⁴, which increased by 1,650 STMs (8.5%) and 3,230 learners (7.1%). The growth was primarily in BCITO's carpentry programme, and a rise in learners in the Skills Organisation's electrical engineering and trades certificates.
23. Enrolments in traineeships decreased by 1,555 STMs (-6.1%) and 3,770 learners (-4.4%). The decrease was caused by the continued decline in level 2 qualifications, which dropped by 23.5% (-1,170 STMs and -3,990 learners) and in direct employer-led training that dropped 83.4% (-605 STMs) compared to December 2018. Some of this decrease occurred at Primary ITO as it has reduced training at lower levels.

Table 2: Industry Training Fund enrolment by learner type

	December 2018		December 2019		Change			
	STM	Learners	STM	Learners	STM	%	Learners	%
Apprenticeships	19,520	45,355	21,170	48,585	1,650	8.5%	3,230	7.1%
Traineeships	25,335	85,835	23,780	82,065	-1,555	-6.1%	-3,770	-4.4%
Total^{1 2}	44,855	128,930	44,950	128,665	95	0.2%	-265	-0.2%

⁴ Based on the number of unique learners funded as Modern Apprentices and New Zealand Apprentices.

Differences between data in this briefing and data the TEC publishes

24. 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.
25. The SDR data in this briefing is for enrolment reporting purposes and includes all funding streams related to YG and SAC⁵. Enrolment figures in this briefing compared to the enrolment by funding stream figures published on the TEC and MoE website will differ based on the approaches used to extract the data.
26. 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 update you on 2020 enrolments throughout the year

27. We will provide you with enrolment updates following the completion of the April SDR submissions and reconciliation.
28. Please note the effect of COVID-19 on enrolments may not be reflected in the SDR until the 2020 August return.

⁵ 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.

Appendix A: Data tables for SAC funds and Youth Guarantee

SAC levels 1 and 2

TEO type	December 2018		December 2019		Change			
	EFTS	Students	EFTS	Students	EFTS	%	Students	%
ITP	2,570	7,735	2,640	7,755	70	2.7%	20	0.3%
PTE	2,055	4,090	1,790	3,320	-265	-12.9%	-770	-18.8%
Wānanga	5,625	8,715	4,950	7,340	-675	-12.0%	-1,375	-15.8%
Total^{1 2}	10,250	20,350	9,380	18,235	-870	-8.5%	-2,115	-10.4%

Youth Guarantee⁶

TEO type	December 2018		December 2019		Change			
	EFTS	Students	EFTS	Students	EFTS	%	Students	%
ITP	1,455	2,300	1,215	1,890	-240	-16.5%	-410	-17.8%
PTE	4,425	7,310	3,825	6,570	-600	-13.6%	-740	-10.1%
School	10	35	10	30	0	0.0%	-5	-14.3%
Wānanga	230	370	55	90	-175	-76.1%	-280	-75.7%
Total^{1 2}	6,120	9,870	5,110	8,485	-1,010	-16.5%	-1,385	-14.0%

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⁶ 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	December 2018		December 2019		Change			
	EFTS	Students	EFTS	Students	EFTS	%	Students	%
Ara Institute of Canterbury	5,535	9,755	5,530	9,520	-5	-0.1%	-235	-2.4%
Eastern Institute of Technology	2,990	5,100	3,050	5,250	60	2.0%	150	2.9%
Manukau Institute of Technology	3,685	6,000	3,685	6,005	0	0.0%	5	0.1%
Nelson Marlborough Institute of Technology	1,930	3,810	1,710	3,465	-220	-11.4%	-345	-9.1%
NorthTec	1,720	2,980	1,670	2,885	-50	-2.9%	-95	-3.2%
Open Polytechnic of New Zealand	4,590	24,840	4,805	25,590	215	4.7%	750	3.0%
Otago Polytechnic	3,890	5,495	4,025	5,670	135	3.5%	175	3.2%
Southern Institute of Technology	3,405	6,850	3,375	6,795	-30	-0.9%	-55	-0.8%
Tai Poutini Polytechnic	600	1,205	200	430	-400	-66.7%	-775	-64.3%
Toi Ohomai Institute of Technology	4,370	7,455	3,965	6,975	-405	-9.3%	-480	-6.4%
Unitec New Zealand	5,705	9,950	4,585	7,250	-1,120	-19.6%	-2,700	-27.1%
Universal College of Learning	2,635	3,945	2,400	3,590	-235	-8.9%	-355	-9.0%
Waikato Institute of Technology	4,115	7,305	3,895	7,080	-220	-5.3%	-225	-3.1%
Wellington Institute of Technology	2,180	3,105	1,990	2,910	-190	-8.7%	-195	-6.3%
Western Institute of Technology at Taranaki	860	1,560	900	1,705	40	4.7%	145	9.3%
Whitireia Community Polytechnic	2,025	2,705	1,920	2,485	-105	-5.2%	-220	-8.1%
Total ITPs^{1 7}	50,240	100,460	47,705	96,095	-2,535	-5.0%	-4,365	-4.3%
Auckland University of Technology	16,540	22,550	16,595	22,240	55	0.3%	-310	-1.4%
Lincoln University	1,795	2,135	1,665	1,970	-130	-7.2%	-165	-7.7%
Massey University	15,120	25,455	15,285	25,620	165	1.1%	165	0.6%
University of Auckland	28,520	35,635	28,415	35,465	-105	-0.4%	-170	-0.5%
University of Canterbury	12,230	14,845	12,845	15,550	615	5.0%	705	4.7%
University of Otago	16,975	18,760	16,975	18,790	<5	0.0%	30	0.2%
University of Waikato	8,465	10,915	8,280	10,785	-185	-2.2%	-130	-1.2%
Victoria University of Wellington	15,800	19,860	15,815	19,600	15	0.1%	-260	-1.3%
Total Universities^{1 7}	115,445	148,660	115,875	148,745	430	0.4%	85	0.1%
Te Wānanga O Aotearoa	13,910	22,410	13,350	21,295	-560	-4.0%	-1,115	-5.0%
Te Wānanga O Raukawa	1,625	3,465	1,680	3,980	55	3.4%	515	14.9%
Te Whare Wānanga O Awanuiārangi	2,080	4,015	1,780	3,905	-300	-14.4%	-110	-2.7%
Total Wānanga^{1 7}	17,610	29,280	16,810	28,650	-800	-4.5%	-630	-2.2%
Total TEIs^{1 7}	183,295	273,630	180,390	268,975	-2,905	-1.6%	-4,655	-1.7%

⁷ Due to rounding of the figures the totals may not add up exactly to the underlying values.

Appendix B: Data tables for Industry Training Fund

Industry Training Fund by Learner type and level

	December 2018		December 2019		Change			
	STM	Learners	STM	Learners	STM	%	Learners	%
Industry Trainees Level 1	0	15	0	0	0	-100.0%	-15	-100.0%
Industry Trainees Level 2	4,970	20,630	3,800	16,640	-1,170	-23.5%	-3,990	-19.3%
Industry Trainees Level 3	12,980	46,175	12,725	45,635	-255	-2.0%	-540	-1.2%
Industry Trainees Level 4	5,810	19,450	5,610	18,945	-200	-3.4%	-505	-2.6%
Industry Trainees Level 5	1,220	3,490	1,325	3,930	105	8.6%	440	12.6%
Industry Trainees Level 6	340	805	315	790	-25	-7.4%	-15	-1.9%
Industry Trainees Level 7	15	20	10	15	-5	-33.3%	-5	-25.0%
Apprenticeships	19,520	45,355	21,170	48,585	1,650	8.5%	3,230	7.1%
Total^{1 2 7}	44,855	128,930	44,950	128,665	95	0.2%	-265	-0.2%

Industry Training Fund by Industry Training Organisation (ITO)

ITO Name	December 2018		December 2019		Change			
	STM	Learners	STM	Learners	STM	%	Learners	%
BCITO	6,780	16,045	7,405	17,200	625	9.2%	1,155	7.2%
Careerforce	5,555	18,630	5,140	18,105	-415	-7.5%	-525	-2.8%
Competenz	5,160	15,230	5,435	16,380	275	5.3%	1,150	7.6%
Connexis	1,950	5,910	1,980	5,105	30	1.5%	-805	-13.6%
HITO	560	1,535	555	1,470	-5	-0.9%	-65	-4.2%
MITO	2,555	5,975	2,690	6,265	135	5.3%	290	4.9%
NZ Marine and Composites ITO	220	615	240	600	20	9.1%	-15	-2.4%
Primary ITO	6,200	20,220	5,475	19,320	-725	-11.7%	-900	-4.5%
ServicelQ	4,140	14,865	4,265	14,820	125	3.0%	-45	-0.3%
Skills Active Aotearoa	1,820	6,730	1,830	6,125	10	0.5%	-605	-9.0%
The Skills Organisation	9,190	22,465	9,820	24,335	630	6.9%	1,870	8.3%
Total ITOs^{1 2 7}	44,130	126,950	44,830	128,260	700	1.6%	1,310	1.0%
Employers in direct funding								
Fletcher Building Holdings	230	520	100	355	-130	-56.5%	-165	-31.7%
Vodafone New Zealand	<5	<5	<5	<5	0	0.0%	0	0.0%
Southern Group Training Trust	75	175	15	85	-60	-80.0%	-90	-51.4%
St John New Zealand	425	1,405	<5	40	-420	-99.5%	-1,360	-97.2%
Total Direct Funding Organisations^{1 2 8}	725	1,405	120	485	-605	-83.4%	-920	-65.5%
Total^{1 2 7}	44,855	128,930	44,950	128,665	95	0.2%	-265	-0.2%

⁸ 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.