



## Tertiary Education Report: December 2020 Enrolment Update

<b>Date:</b>	9 April 2021	<b>TEC priority:</b>	Low
<b>Security level:</b>	In Confidence	<b>Report no:</b>	B-21-00132
		<b>Minister's office No:</b>	

### ACTION SOUGHT

	Action(s) Sought	Deadline
<b>Hon Chris Hipkins</b> Minister of Education	<p><b>Note</b> the sector's enrolment data following the December 2020 Single Data Return (SDR);</p> <p><b>Note</b> the TEC will provide a Fees Free update in a separate briefing;</p> <p><b>Note</b> the TEC will publish enrolment data in April; and</p> <p><b>Agree</b> for the TEC to proactively release this briefing in due course.</p>	At your earliest convenience
<b>Enclosure:</b> No	<b>Round Robin:</b> Yes	

### CONTACT FOR TELEPHONE DISCUSSION (IF REQUIRED)

Name	Position	Telephone	1st contact
Gillian Dudgeon	Deputy Chief Executive, Delivery	9(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 Withdrawn           |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

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**Hon Chris Hipkins**, Minister of Education

*It is recommended that you:*

1. **note** the sector's enrolment data following the December 2020 Single Data Return (SDR);
2. **note** the TEC will provide a Fees Free enrolment update in a separate briefing;
3. **note** the TEC will publish enrolment data in April; and
4. **agree** for the TEC to proactively release this briefing in due course.

**AGREED** /  **NOT AGREED**



**Gillian Dudgeon**

Deputy Chief Executive, Delivery

9 April 2021



**Hon Chris Hipkins**

Minister of Education

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## Purpose

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1. This paper provides an update on enrolments as at December 2020 compared to the same time in 2019. In terms of funding, the Government committed to not recover funding in 2020 for all funds covered in this briefing. Consequently, any changes in enrolment patterns will not affect funding received by tertiary education organisations (TEOs).
2. The paper focuses on enrolments in three funds – Student Achievement Component (SAC), Youth Guarantee (YG), and the Industry Training Fund (ITF)<sup>1</sup>.
3. Enrolments are cumulative and build from January to December during the calendar year. The figures used include learners who were eligible for funding between January and December 2020.

## Enrolment patterns vary between funds and sub-sectors

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4. Overall there was a small increase in the number of learners in industry training in December 2020 compared to the same period in 2019 (550/0.4%). However, the number of apprentices increased by 8,525 (17.6%).
5. Overall SAC level 3 and above enrolments were stable when comparing December 2019 and December 2020.
6. Foundation level enrolments (SAC levels 1 and 2 and Youth Guarantee) continue to decline. SAC levels 1 and 2 enrolments declined by 2,490 learners (-13.7%) and YG enrolments by 1,275 learners (-15.3%). These decreases were greater than the declines reported between 2018 and 2019 (-10.4% for SAC levels 1 and 2 and -14% for YG).

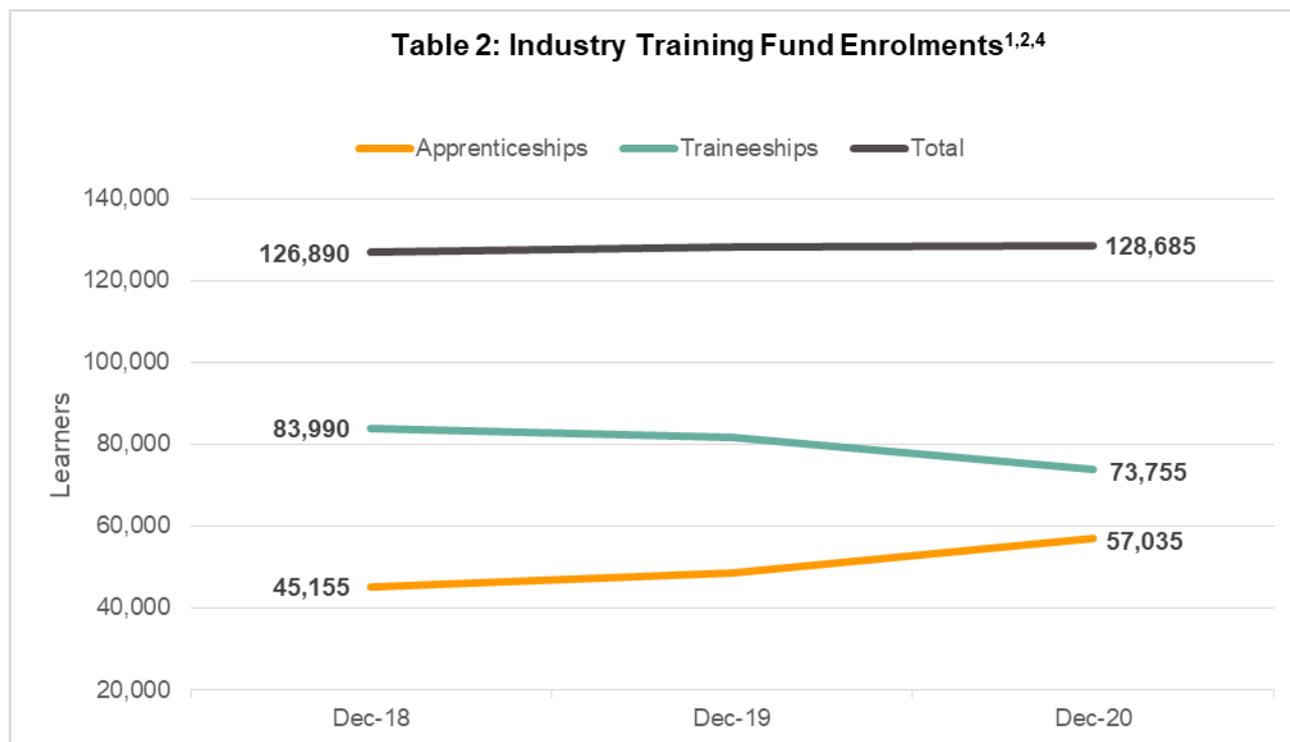
**Table 1: Enrolment changes between December 2019 and December 2020<sup>2</sup>**

Fund	Change in EFTS/STMs		Change in Learners	
	Number	Percentage	Number	Percentage
Industry Training Fund	-1,050	-2.3%	550	0.4%
SAC level 3 and above	-125	-0.1%	2,375	0.8%
SAC levels 1 and 2	-1,930	-20.6%	-2,490	-13.7%
Youth Guarantee	-1,060	-21.3%	-1,275	-15.3%

<sup>1</sup> Data extracted as at 4 March 2021 from the December Single Data Return (SDR) and for the period ending 31 December 2020 from the Industry Training Register (ITR). Please note data is subject to change.

<sup>2</sup> All values in this briefing have been rounded to the nearest 5. Due to rounding, total values may not add up exactly to the underlying values.

## While industry training enrolments are steady overall, apprenticeships have grown<sup>3</sup>



7. The industry training sector experienced a small increase of 550 (0.4%) learners. However, standard training measures (STMs) decreased by 1,050 (-2.3%) between December 2019 and December 2020.
8. In December 2020, 7,870 (-9.6%) fewer trainees were reported compared to December 2019. This equates to a decrease of 2,940 (-12.4%) STMs. Nine of the 11 Transitional Industry Training Organisations (Transitional ITOs) reported decreased trainee enrolments. BCITO and Competenz increased their trainee numbers by 660 (43.4%) and 145 (1.4%) respectively.
9. In December 2020, apprenticeship numbers<sup>5</sup> increased by 8,525 learners (17.6%) and 1,890 STMs (9.0%) compared to the same time last year. All Transitional ITOs reported increases in apprenticeship enrolments.
10. We have been monitoring industry training enrolments monthly. As reported in our August 2020 enrolment update (B-20-00674), apprenticeship enrolments dropped by 1,540 learners (-3.7%) in June 2020 when compared to the same period in June 2019. The drop had reversed by the end of August and enrolments increased further for the rest of 2020. This may be due to apprentices starting later due to the COVID-19 restrictions applied to many workplaces from March to May 2020, and responses to initiatives such as the Targeted Training and Apprenticeship Fund (TTAF) and Apprenticeship Boost.

<sup>3</sup> For Industry Training Register data we have focussed on changes in learner numbers. This is because the correlation between learners and STMs is not as comparable as between learners and EFTS due to learners being in employment.

<sup>4</sup> Learners can be double counted where they are studying at more than one TEO and/or in more than one qualification. The totals in the tables and graphs remove double counted learners. Therefore, the sum of learner numbers by sub-category may not equal the totals in the tables.

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

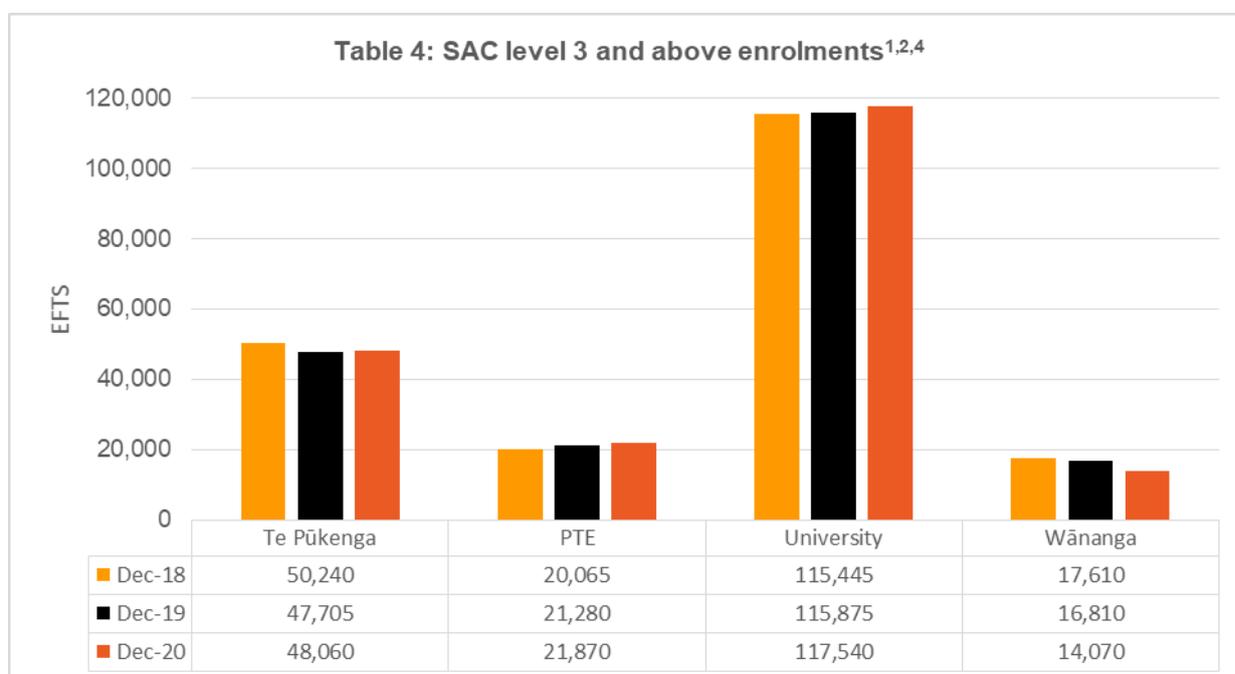
**Table 3: Transitional ITOs with the largest increases in apprenticeships<sup>2</sup>**

Transitional ITO	2020 Apprenticeships	Apprentice Increase	Percentage
BCITO	19,055	3,420	21.9%
The Skills Organisation	12,035	1,515	14.4%
Primary ITO	5,780	995	20.8%
Connexis	2,635	585	28.5%
Competenz	6,380	555	9.5%

### *Enrolment demographics have changed for apprentices*

- There has been a large increase in apprentices aged over 25-years-old between December 2019 and December 2020. The number of apprentices aged 25 to 39-years-old increased by 3,730 (19.7%) and those 40-years-old and over increased by 1,510 (28.3%). There was a smaller increase in apprentices aged under 25-years-old (3,280/13.5%).
- Apprentices who identify as Māori or Pacific Peoples increased by 2,295 (28%) and 965 (29.2%) respectively, compared to 6,355 (16%) for other ethnicities between December 2019 and December 2020.
- The proportion and number of women enrolled in industry training have both increased. While the proportion of women is relatively low, female apprentices increased from 11.6% to 12.7% of all apprentices. The number of female apprentices increased 29.1% (1,635 apprentices) between December 2019 and December 2020. In the same period male apprentices increased by 6,790 (15.9%).

### **Overall SAC level 3 and above enrolments are stable**



- In December 2020, total SAC level 3 and above enrolments decreased by 125 EFTS (-0.1%) compared to December 2019. However, the number of learners enrolled increased by 2,375 (0.8%) in the same period. The difference between EFTS and learners is due to a combination of new enrolments studying part-time and learners starting study in the second half of the year.

15. Universities, Te Pūkenga, and Private Training Establishments (PTEs) reported increases in both equivalent full-time student (EFTS) and learners (refer to Table 5). However, enrolments have decreased significantly at Wānanga (-16.3% EFTS or -14.5% learners).
16. As mentioned in the August 2020 enrolment update (B-20-00674), enrolments decreased significantly at Te Wānanga O Aotearoa (TWOA). TWOA reported 3,890 fewer learners (-18.3%) or 2,675 fewer (-20%) EFTS in December 2020 compared with December 2019. Te Whare Wānanga O Awanuiārangi also reported a decrease of 430 learners (-10.9%), while Te Wānanga O Raukawa reported a small increase of 50 learners (1.3%).
17. TWOA surveyed learners who withdrew from their courses in the first half of 2020. The survey results showed the decline was due to the financial and social impacts of COVID-19, including school aged children learning from home. The demographic makeup at TWOA, where 70% of learners are females aged 25 and over, is likely to have contributed to the significant decline in enrolments.
18. PTE learner enrolments increased by 2,595 (7%) between December 2019 and December 2020. Increases were reported at all levels of study. There was a large increase (from 20 to 630) in learners enrolled in micro-credentials at PTEs.

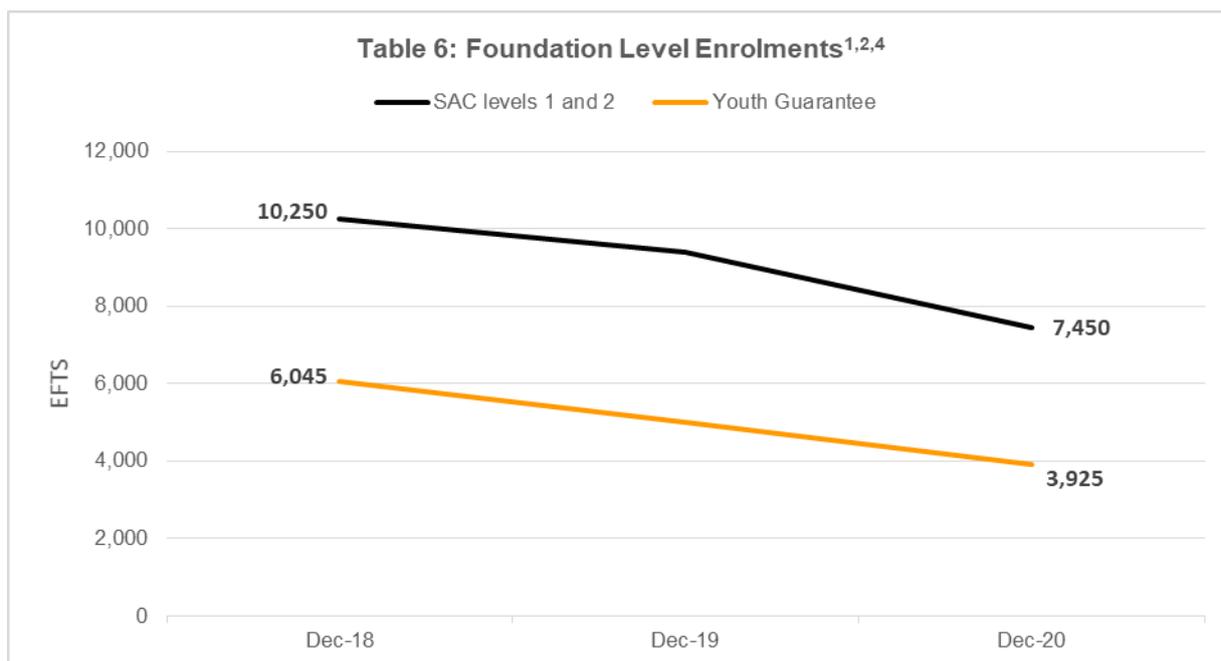
**Table 5: SAC level 3 and above enrolments<sup>1,2,4</sup>**

	December 2019		December 2020		Change			
	EFTS	Students	EFTS	Students	EFTS	%	Students	%
PTE	21,280	37,285	21,870	39,880	590	2.8%	2,595	7.0%
Te Pūkenga	47,705	96,095	48,060	97,500	355	0.7%	1,415	1.5%
University	115,875	148,745	117,540	150,955	1,665	1.4%	2,210	1.5%
Wānanga	16,810	28,650	14,070	24,510	-2,740	-16.3%	-4,140	-14.5%
<b>Total<sup>1,2,4</sup></b>	<b>201,665</b>	<b>303,070</b>	<b>201,540</b>	<b>305,445</b>	<b>-125</b>	<b>-0.1%</b>	<b>2,375</b>	<b>0.8%</b>

#### *Learner demographics have changed*

19. There have been shifts in the age demographics of learners in December 2020 compared to December 2019. Learners aged between 25-39 years old increased by 3,275 (3.5%). Overall, the number of learners aged 40 and over decreased by 844 (-1.4%). However, PTEs (1,440/17.2%) and universities (418/2.7%) reported an increase in learners in this age group.
20. During 2020, 30.4% of all SAC level 3 and above learners enrolled extramurally in at least one course. This is an increase of 9,545 learners (11.5%) compared with December 2019.
21. The number of female learners increased 1,375 (0.7%) in December 2020 compared to December 2019. Male learner numbers increased by 725 (0.6%). The proportion of female learners has remained the unchanged at 61.9% of all SAC level 3 and above learners.
22. Learners who identify as Māori decreased by 2,230 (-4%) between December 2019 and December 2020. However, Pacific Peoples increased by 435 (2%) and non-Māori and non-Pacific Peoples by 4,295 (2%).

## Foundation education enrolments continue to decline



23. Foundation education enrolments continue to fall across all subsectors. YG enrolments decreased by 1,060 EFTS (-21.3%) and 1,275 students (-15.3%). SAC levels 1 and 2 enrolments decreased by 1,930 EFTS (-20.6%) and 2,490 students (-13.7%). The drop in YG learner numbers primarily occurred at PTEs while the decrease in SAC levels 1 and 2 occurred at TWoA.
24. The decline in foundation level enrolments has occurred across all applicable sub-sectors and continues the trend seen for at least the past three years.

## Differences between data in this briefing and data the TEC publishes

25. The SDR data in this briefing is for enrolment reporting purposes and includes all funding related to YG and SAC<sup>6</sup>. Enrolment figures in this briefing will differ to enrolment figures published on the TEC and MoE websites based on the approaches used to extract the data.
26. Enrolments at Transitional ITOs can occur throughout the year. Enrolment levels are subject to change.

## We will update you following the April 2021 SDR

27. We will provide you with an enrolment update covering SAC, YG, and the ITF following the completion of the April 2021 SDR.
28. We will update you on Fees Free enrolments as at December 2020 in a separate briefing when the data has been finalised.

<sup>6</sup> Includes SAC levels 1 and 2 (which contains aggregate data for the following funds: SAC levels 1 and 2 Competitive funding, SAC levels 1 and 2 Plan Process funding and Maori Pasif ka Trade Training levels 1 and 2) and 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 Pasif ka Trades Training levels 3 and 4, and ICT Graduate Schools.)