

## Tertiary Education Report: 2018 final full-year enrolments at tertiary education organisations

|                        |               |                              |            |
|------------------------|---------------|------------------------------|------------|
| <b>Date:</b>           | 31 May 2019   | <b>TEC priority:</b>         | High       |
| <b>Security level:</b> | In Confidence | <b>Report no:</b>            | B-19-00706 |
|                        |               | <b>Minister's office No:</b> |            |

| ACTION SOUGHT                                     |   |                              |
|---|---|------------------------------|
|   | Action sought   | Deadline                     |
| <b>Hon Chris Hipkins</b><br>Minister of Education | <b>Note</b> the final full-year 2018 enrolment data submitted by tertiary education organisations in the Single Data Return, Industry Training Register and manual fees-free enrolment returns. | At your earliest convenience |
| <b>Enclosure:</b> No                              | <b>Round Robin:</b> No  |                              |

| CONTACT FOR TELEPHONE DISCUSSION (IF REQUIRED) |   |                    |            |             |
|--|---|--------------------|------------|-------------|
| Name   | Position                                      | Telephone          |            | 1st contact |
| Gillian Dudgeon                                | Deputy Chief Executive – Delivery Directorate | 9(2)(a) [REDACTED] | [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:**
 Approved   
  Declined  
 Noted   
 Needs change  
 Seen   
 Overtaken by Events  
 See Minister's Notes   
 Withdrawn

**Comments:**

## Recommendations

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**Hon Chris Hipkins**, Minister of Education

*It is recommended that you:*

1. **note** the 2018 final full-year enrolment data submitted by tertiary education organisations in the Single Data Return, Industry Training Register and manual fees-free enrolment returns;
2. **note** that this data updates an earlier briefing [B/19/00360] on 2018 interim enrolments;
3. **note** that there have been minor changes between the interim report and this report to account for a few late data submissions and the final cut-off date for industry training data; and
4. **note** that the TEC will release this briefing at the same time as any public announcement on final 2018 fees-free and enrolment data.



**Gillian Dudgeon**

Deputy Chief Executive, Delivery  
Tertiary Education Commission

31 May 2019

**Hon Chris Hipkins**

Minister of Education

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## Purpose

1. This paper provides you with final full-year 2018 enrolment data for Tertiary Education Organisations (TEOs). The data is now final and updates our earlier 25 March briefing which provided you with interim 2018 data [B-19-00360].

## Small change to SAC level 3 and above enrolment trends in the SDR

*SAC Levels 3 and above enrolments have remained flat across the whole sector with variability between sub-sectors*

2. The March briefing noted that there were outstanding 2018 December Single Data Returns (SDRs) from a small number of Private Training Establishments (PTEs). All late submissions have now been received and we have finalised enrolment data. Table 1 shows final 2018 enrolments for SAC Levels 3 and above.
3. For all subsectors, the commentary on enrolment trends has not changed. A detailed breakdown is provided in Appendix A.
4. The sector-wide 2018 enrolments were flat compared to 2017, with a decrease of 648 equivalent full-time students (EFTS) or a 0.3% decrease. This equates to a decrease of 4,562 students or a 1.5% decrease.
5. The universities are the only subsector with slightly increased EFTS, up 1.1%, however the number of students declined slightly. The largest increase was at level 5, up 1,381 EFTS (10.8%). Postgraduate programmes at levels 8, 9 and 10 showed a total increase of 951 EFTS, 3.1%. The largest declines were at levels 4 and 6 which saw a total decline of 3,236 EFTS or 7,262 students.

**Table 1: SAC Level 3 and above enrolments 2018 compared to 2017<sup>1</sup>**

|              | Dec-18         |                | Dec-17         |                | Change       |              |                |              |
|--------------|----------------|----------------|----------------|----------------|--------------|--------------|----------------|--------------|
|              | EFTS           | Students       | EFTS           | Students       | EFTS         | %age         | Students       | %age         |
| Universities | 115,440        | 148,646        | 114,228        | 148,801        | 1,212        | 1.1%         | (155)          | -0.1%        |
| ITPs         | 50,238         | 100,460        | 51,202         | 101,239        | (964)        | -1.9%        | (779)          | -0.8%        |
| Wānanga      | 17,612         | 29,281         | 18,303         | 31,205         | (690)        | -3.8%        | (1,924)        | -6.2%        |
| PTEs         | 20,219         | 35,338         | 20,424         | 37,042         | (205)        | -1.0%        | (1,704)        | -4.6%        |
| <b>Total</b> | <b>203,510</b> | <b>305,920</b> | <b>204,157</b> | <b>310,023</b> | <b>(648)</b> | <b>-0.3%</b> | <b>(4,562)</b> | <b>-1.5%</b> |

6. For SAC Levels 1 and 2 and Youth Guarantee, the trends noted in our previous briefing remain the same with minor changes in the level of enrolments:
  - a. SAC levels 1 and 2 showed an increase in EFTS delivered (+185) but a slight decrease in student numbers (-143); and
  - b. Youth Guarantee showed another year of decreasing enrolments (-1,357 EFTS and -1,790 students).

<sup>1</sup> 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.

## ITO<sup>2</sup> enrolment trends were similarly flat

7. The data provided below and in Appendix B reflect final 2018 Industry Training Organisation (ITO) delivery as of 1 April 2019. Compared to our previous briefing on interim 2018 enrolments, the data has changed only marginally. The overall trends remain as we noted in our previous briefing.
8. Table 2 provides the revised figures. The trends of increasing enrolments in apprenticeships and decreasing enrolments in industry training continued during 2018. Apprenticeship learner enrolments were up about 11% compared with 2017, while industry training learner enrolments decreased by 9%.

**Table 2: Industry Training Fund delivery by learner type**

|                                | 2018          |                | 2017          |                | Change       |              |                |              |
|--------------------------------|---------------|----------------|---------------|----------------|--------------|--------------|----------------|--------------|
|                                | STMs          | Learners       | STMs          | Learners       | STMs         | %age         | Learners       | %age         |
| Apprentices                    | 19,535        | 45,350         | 17,605        | 40,905         | 1,930        | 11.0%        | 4,445          | 10.9%        |
| Industry trainees              | 25,381        | 85,695         | 28,075        | 94,150         | (2,694)      | -9.6%        | (8,455)        | -9.0%        |
| <b>Grand Total<sup>3</sup></b> | <b>44,915</b> | <b>128,802</b> | <b>45,680</b> | <b>132,537</b> | <b>(764)</b> | <b>-1.7%</b> | <b>(3,735)</b> | <b>-2.8%</b> |

9. Five ITOs decreased their standard training measures (STMs) in 2018 compared to 2017: PrimaryITO, Competenz, ServiselQ, Connexis and Skills Active Aotearoa.
10. Three ITOs had significant increases:
  - a. Building and Construction ITO (626 STMs or 1,199 learners),
  - b. The Skills Organisation (619 STMs or 1,645 learners), and
  - c. Careerforce (548 STMs or 899 learners).

The STM figures in paragraph 10 were incorrectly transposed. The corrected figures are:

- a. Building and Construction ITO (460 STMs or 1,199 learners),
- b. The Skills Organisation (599 STMs or 1,645 learners), and
- c. Careerforce (539 STMs or 899 learners).

## Fees-free enrolments have increased from 41,700 in August to 47,019 in December

11. Table 3 shows there are 47,019 eligible students or trainees (learners) enrolled in eligible qualifications for the full year 2018<sup>4</sup>. This compares to the about 46,800 we reported to you as an interim year end number [B-19-00360].
12. In March and April 2019, the TEC carried out a 2018 funding recovery process of 21 tertiary education providers who resubmitted their fees-free data. In addition to this, 12 tertiary education providers that had not submitted their Single Data Return by the due date (05 February) have since had their 2018 wash-up calculation.

<sup>2</sup> The term "ITOs" includes enrolments at employers (DFOs) that are funded directly through the direct funding scheme, including Vodafone which exited the scheme between 2017 and 2018.

<sup>3</sup> "Grand Total" learner count numbers represent distinct learners - for this reason the Grand Totals for 2017 and 2018 learners will be less than total learner numbers arrived at through summing up the individual rows.

<sup>4</sup> This analysis reflects TEO reporting that the TEC has received for the year ending 31 December 2018 and learner (student and trainees) eligibility as at 5 February 2019. All provider data relates to claims for the full year of study. Industry training organisations' data relates to an enrolment in a fees-free eligible programme commencing in 2018.

**Table 3: Number of students or trainees receiving a financial benefit from fees-free reported by TEO type for 2018**

| Tertiary Education Organisation Type          | December enrolments | August enrolments | April enrolments  | % of total fees-free enrolments |
|---|---------------------|-------------------|-------------------|---------------------------------|
|   | Students/trainees   | Students/trainees | Students/trainees |                                 |
| Universities                                  | 23,838              | 23,500            | 21,100            | 49.7%                           |
| Institutes of Technology & Polytechnics       | 12,115              | 10,800            | 7,500             | 25.3%                           |
| Wānanga                                       | 163                 | 100               | 100               | 0.3%                            |
| <b>Total Tertiary Education Institutions</b>  | <b>36,116</b>       | <b>34,400</b>     | <b>28,700</b>     | <b>75.3%</b>                    |
| Private Training Establishments               | 6,973               | 5,300             | 3,600             | 14.5%                           |
| <b>Total Tertiary Education Providers</b>     | <b>43,089</b>       | <b>39,700</b>     | <b>32,300</b>     | <b>89.9%</b>                    |
| Industry Training Organisations               | 4,845               | 2,600             | 1,200             | 10.1%                           |
| <b>Total Tertiary Education Organisations</b> | <b>47,934</b>       | <b>42,300</b>     | <b>33,500</b>     | <b>100.0%</b>                   |
| Less Multi-enrolments                         | (915)               | 600               | 200               |                                 |
| <b>Unique Students &amp; Trainees</b>         | <b>47,019</b>       | <b>41,700</b>     | <b>33,300</b>     |                                 |

13. As previously indicated most fees-free eligible enrolments are in universities (49.7%) and ITPs (25.3%). Smaller percentages of learners are enrolled in PTEs (14.5%) and wānanga (less than 1%). ITOs make up 10.1%. These figures have not changed substantively from the interim figures.
14. As noted in our previous briefing, the wānanga fees-free enrolments are low for a couple of reasons. Many of the students that are enrolling at wānanga are older learners who have a high likelihood of prior tertiary study and therefore are ineligible for fees-free. There are also many programmes offered at the wānanga which were “fees free” prior to the introduction of the fees-free policy. Therefore, students enrolled in these programmes will not be receiving a financial benefit from the fees-free policy and are not included in the fees-free figures in Table 3.
15. In total, TEOs claimed \$270,803,199 (excluding GST) for fees-free enrolments in 2018. Broken down by provider and ITO, \$263,706,177 were claimed by TEIs and PTEs and \$7,097,023 by ITOs.
16. Note that the final figures may change once:
  - a. Further reconciliations to the December 2018 SDR and April 2019 ITR have been completed
  - b. The April 2019 SDR has been fully analysed
  - c. Any further reviews requested by a TEO of their data and/or payment allocation have been completed (there are current reviews underway)
  - d. Any further reviews requested by learners of their eligibility status have been completed.

#### *Actuals vs Forecast*

17. In October 2018, Ministry of Education (MoE) estimated that around 50,000 students or trainees were expected to take up fees-free by the end of 2018. This number was based on the number

of learners that were enrolled in fees-free eligible programmes and whose characteristics indicated they could be eligible for fees-free support, as at August 2018, and projected out to December 2018.

18. Actual figures for the full 2018 year are 2,981 students and trainees fewer than the projection provided in October 2018. Only about 5,300 more people took up fees free in 2018 after August 2018 data was reported. TEOs were encouraged to review specific students and trainees identified in data (to August 2018) who were not receiving a financial benefit, in order to determine whether they were in fact eligible for fees-free.
19. Estimates of those benefiting from fees-free are likely to be higher than actuals as they estimate probable eligibility, and will include some students and trainees who are not actually eligible for fees-free. This is due to not all eligibility criteria being available in tertiary data sets, such as prior overseas study, prior New Zealand study undertaken a significant time ago, or insufficient residency period.

## **Differences of data in this briefing with data TEC publishes**

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20. As noted in our previous briefing, we publish high-level sector and individual TEO SDR enrolment data after each reporting period. The TEC does this for transparency of funding purposes and thus we cut the data by funding streams and EFTS consumed as they relate to funding. We expect this to occur in June 2019.
21. The SDR data in this briefing is for enrolment reporting purposes, it includes all funding streams that are related to SAC 3+ (all SAC L3+, SAC L3&4 Competitive funding, MPTT L3&4 and ICT grad schools). Therefore 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.

## **Publicly communicating enrolment data and release of this briefing**

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22. In our previous briefing, you agreed that we would proactively release the briefings at the same time that any public announcement on fees-free and enrolment data is made.
23. We will discuss with your office how and when you would like to publicly communicate the fees-free specific data and whether you wish to update your Cabinet colleagues prior to its release.

## Appendix A: Tertiary education organisations - SAC level 3 and above enrolments by provider and sector<sup>5</sup>

|                      | Dec-18         |                | Dec-17         |                | Change       |              |                |              |
|----------------------|----------------|----------------|----------------|----------------|--------------|--------------|----------------|--------------|
|                      | EFTS           | Students       | EFTS           | Students       | EFTS         | %age         | Students       | %age         |
| UA                   | 28,518         | 35,633         | 28,704         | 36,071         | (187)        | -0.7%        | (438)          | -1.2%        |
| AUT                  | 16,541         | 22,550         | 16,270         | 22,196         | 271          | 1.7%         | 354            | 1.6%         |
| UW                   | 8,465          | 10,915         | 8,270          | 10,712         | 195          | 2.4%         | 203            | 1.9%         |
| Massey               | 15,118         | 25,453         | 15,051         | 25,857         | 68           | 0.4%         | (404)          | -1.6%        |
| VUW                  | 15,799         | 19,859         | 15,682         | 19,792         | 117          | 0.7%         | 67             | 0.3%         |
| UC                   | 12,232         | 14,847         | 11,549         | 14,140         | 684          | 5.9%         | 707            | 5.0%         |
| Lincoln              | 1,794          | 2,136          | 1,984          | 2,924          | (190)        | -9.6%        | (788)          | -26.9%       |
| UO                   | 16,972         | 18,748         | 16,718         | 18,567         | 254          | 1.5%         | 181            | 1.0%         |
| <b>Total Unis</b>    | <b>115,440</b> | <b>148,646</b> | <b>114,228</b> | <b>148,801</b> | <b>1,212</b> | <b>1.1%</b>  | <b>(155)</b>   | <b>-0.1%</b> |
| Unitec               | 5,707          | 9,950          | 5,840          | 10,438         | (132)        | -2.3%        | (488)          | -4.7%        |
| Ara                  | 5,537          | 9,756          | 5,450          | 9,814          | 87           | 1.6%         | (58)           | -0.6%        |
| EIT                  | 2,988          | 5,098          | 2,888          | 4,759          | 100          | 3.4%         | 339            | 7.1%         |
| WelTec               | 2,180          | 3,107          | 2,170          | 3,180          | 10           | 0.4%         | (73)           | -2.3%        |
| UCoL                 | 2,635          | 3,946          | 2,591          | 3,835          | 44           | 1.7%         | 111            | 2.9%         |
| MIT                  | 3,687          | 5,998          | 4,009          | 6,535          | (321)        | -8.0%        | (537)          | -8.2%        |
| NMIT                 | 1,932          | 3,809          | 1,917          | 3,657          | 15           | 0.8%         | 152            | 4.2%         |
| NorthTec             | 1,720          | 2,981          | 1,902          | 3,197          | (182)        | -9.6%        | (216)          | -6.8%        |
| Otago                | 3,892          | 5,497          | 3,633          | 4,939          | 259          | 7.1%         | 558            | 11.3%        |
| Whitireia            | 2,025          | 2,704          | 1,969          | 2,793          | 57           | 2.9%         | (89)           | -3.2%        |
| SIT                  | 3,403          | 6,849          | 3,229          | 6,698          | 174          | 5.4%         | 151            | 2.3%         |
| WITT                 | 860            | 1,561          | 881            | 1,719          | (21)         | -2.3%        | (158)          | -9.2%        |
| Wintec               | 4,113          | 7,305          | 4,052          | 7,180          | 62           | 1.5%         | 125            | 1.7%         |
| OPNZ                 | 4,592          | 24,841         | 4,868          | 24,210         | (276)        | -5.7%        | 631            | 2.6%         |
| TPP                  | 598            | 1,206          | 1,380          | 2,687          | (782)        | -56.7%       | (1,481)        | -55.1%       |
| Toi Ohomai           | 4,370          | 7,456          | 4,426          | 7,251          | (56)         | -1.3%        | 205            | 2.8%         |
| <b>Total ITPs</b>    | <b>50,238</b>  | <b>100,460</b> | <b>51,202</b>  | <b>101,239</b> | <b>(964)</b> | <b>-1.9%</b> | <b>(779)</b>   | <b>-0.8%</b> |
| TWoA                 | 13,908         | 22,409         | 14,276         | 22,916         | (369)        | -2.6%        | (507)          | -2.2%        |
| TWoR                 | 1,626          | 3,464          | 1,630          | 3,383          | (5)          | -0.3%        | 81             | 2.4%         |
| TWWoA                | 2,079          | 4,016          | 2,396          | 5,672          | (317)        | -13.2%       | (1,656)        | -29.2%       |
| <b>Total Wānanga</b> | <b>17,612</b>  | <b>29,281</b>  | <b>18,303</b>  | <b>31,205</b>  | <b>(690)</b> | <b>-3.8%</b> | <b>(1,924)</b> | <b>-6.2%</b> |
| <b>Total TEIs</b>    | <b>183,291</b> | <b>273,616</b> | <b>183,733</b> | <b>276,241</b> | <b>(442)</b> | <b>-0.2%</b> | <b>(2,625)</b> | <b>-1.0%</b> |
| All PTEs             | 20,219         | 35,338         | 20,424         | 37,042         | (205)        | -1.0%        | (1,704)        | -4.6%        |
| <b>Total All</b>     | <b>203,510</b> | <b>305,920</b> | <b>204,157</b> | <b>310,023</b> | <b>(648)</b> | <b>-0.3%</b> | <b>(4,103)</b> | <b>-1.3%</b> |

<sup>5</sup> 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.

## Appendix B: Industry Training Fund data by Industry Training Organisation

### Industry Training Fund by Organisation type and Organisation

|  | 2018          |                | 2017          |                | Change       |               |                |               |
|--|---------------|----------------|---------------|----------------|--------------|---------------|----------------|---------------|
|  | STMs          | Learners       | STMs          | Learners       | STMs         | %age          | Learners       | %age          |
| BCITO                                  | 6,803         | 16,053         | 6,343         | 14,854         | 460          | 7.2%          | 1,199          | 8.1%          |
| Careerforce                            | 5,537         | 18,435         | 4,998         | 17,536         | 539          | 10.8%         | 899            | 5.1%          |
| Competenz                              | 5,171         | 15,238         | 5,747         | 17,627         | (576)        | -10.0%        | (2,389)        | -13.6%        |
| Connexis                               | 1,949         | 5,903          | 2,113         | 6,115          | (164)        | -7.8%         | (212)          | -3.5%         |
| HITO                                   | 561           | 1,536          | 523           | 1,332          | 38           | 7.2%          | 204            | 15.3%         |
| MITO                                   | 2,554         | 5,979          | 2,332         | 5,742          | 222          | 9.5%          | 237            | 4.1%          |
| NZMAC ITO                              | 219           | 613            | 209           | 576            | 10           | 4.8%          | 37             | 6.4%          |
| Primary ITO                            | 6,180         | 20,280         | 6,999         | 23,577         | (819)        | -11.7%        | (3,297)        | -14.0%        |
| ServiceIQ                              | 4,151         | 14,874         | 4,905         | 17,014         | (754)        | -15.4%        | (2,140)        | -12.6%        |
| Skills Active Aotearoa                 | 1,816         | 6,700          | 1,854         | 6,145          | (38)         | -2.1%         | 555            | 9.0%          |
| The Skills Organisation                | 9,221         | 22,474         | 8,623         | 20,829         | 599          | 6.9%          | 1,645          | 7.9%          |
| <b>Total ITOs</b>                      | <b>44,163</b> | <b>126,818</b> | <b>44,647</b> | <b>129,820</b> | <b>(483)</b> | <b>-1.1%</b>  | <b>(3,002)</b> | <b>-2.3%</b>  |
| Fletcher Building                      | 253           | 521            | 14            | 190            | 239          | 1672.9%       | 331            | 174.2%        |
| Southern Group                         |               |                |               |                |              |               |                |               |
| Training                               | 74            | 174            | 65            | 152            | 9            | 13.7%         | 22             | 14.5%         |
| St John NZ                             | 424           | 1,404          | 674           | 1,799          | (250)        | -37.1%        | (395)          | -22.0%        |
| Vodafone                               | 1             | 1              | 280           | 712            | (279)        | -99.7%        | (711)          | -99.9%        |
| <b>Total DFOs</b>                      | <b>752</b>    | <b>2,100</b>   | <b>1,033</b>  | <b>2,853</b>   | <b>(281)</b> | <b>-27.2%</b> | <b>(753)</b>   | <b>-26.4%</b> |
| <b>Total Organisations<sup>6</sup></b> | <b>44,915</b> | <b>128,802</b> | <b>45,680</b> | <b>132,537</b> | <b>(764)</b> | <b>-1.7%</b>  | <b>(3,735)</b> | <b>-2.8%</b>  |

<sup>6</sup> "Total Organisations" learner count numbers represent distinct learners - for this reason the organisation totals for 2017 and 2018 learners will be less than total learner numbers arrived at through summing up the individual ITO and DFO rows.