



## Briefing Note: High-level analysis of indicative enrolments at tertiary education providers in 2021

<b>To:</b>	Hon Chris Hipkins, Minister of Education		
<b>Date:</b>	14 April 2021	<b>Priority:</b>	Medium
<b>Security Level:</b>	In Confidence	<b>METIS No:</b>	1256058
<b>Drafter:</b>	Warren Smart	<b>DDI:</b>	
<b>Key Contact:</b>	Shona Ramsay	<b>DDI:</b>	9(2)(a)
<b>Messaging seen by Communications team:</b>	n/a	<b>Round Robin:</b>	No

### Purpose of Report

The purpose of this paper is for you to:

**Note** the high-level analysis of indicative enrolments at tertiary education providers as at 1 March 2021 compared with the previous year.

**Note** that the Ministry will be doing a more in-depth analysis of enrolments in 2021 using April Single Data Return data when it is available and undertake future analysis on how successful this large cohort of students were.

**Agree** that this Briefing will be proactively released.

Agree / Disagree

### Summary

- The Ministry has used data from the Indicative Single Data Return to provide a high-level analysis of the main trends in enrolments at tertiary education providers as at 1 March 2021 compared to the same time in the previous year.
- The indicative data shows that:
  - the increase in domestic students was 12% in 2021, compared with increases of less than 1% in each of the previous four years
  - although domestic enrolments were up overall, the rate of growth in enrolments was particularly strong for older age groups in Level 3-7 certificates/diplomas and in postgraduate studies
  - the rate of growth in Māori enrolments was lower than other ethnic groups, but a factor in this was that a third of Māori enrolments are in wānanga, where enrolments were relatively static in 2021.

- the rate of growth in domestic students who were enrolled in 2021 but not in the previous year, was substantially higher than for students who were enrolled in 2021 and were also enrolled in the previous year
  - in terms of fields of study of domestic students in 2021, at the non-degree level there were substantial increases in study in Building, at postgraduate level (combined with graduate certificates and diplomas) increases in Teacher education were a standout, while at bachelors degree level Nursing and Business and management exhibited the largest increases
  - the number of international students decreased by 31% in 2021 compared with the same time in the previous year.
- We will provide a more detailed analysis of 2021 enrolments at tertiary education providers using data from the April Single Data Return when it becomes available in May. We will brief you on the findings in early June 2021. We will repeat this exercise with full-year enrolment data for 2021 and use completions data to incorporate an analysis of how successful this large cohort of students was.



Shona Ramsay  
**Senior Manager, Tertiary Education**  
**Graduate Achievement, Vocations and Careers**  
14/04/2021



Hon Chris Hipkins  
**Minister of Education**

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## Background

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1. Since 2016, tertiary education providers have submitted an Indicative Single Data Return (SDR) which provides information on enrolments at the institutions as at 1 March in each year.
2. The quality of the data supplied via the Indicative SDR is lower than later returns in the year, as it does not contain all the information usually present in the SDR and does not go through the usual validations and quality control (for instance, unlike later returns, the providers are not required to 'sign-off' the indicative return). Therefore, the data in this return is indicative in nature only.
3. In the past, the indicative data has been used to check at the very highest level how enrolments may be tracking in a year. However, given the apparent scale of the increase in enrolments in 2021 and the associated high level of interest in how tertiary enrolments are tracking due to the impact of COVID-19, we have looked at the indicative data in more depth than usual to identify high-level trends in the data.
4. Confirmation of any trends will only come when we have analysed data submitted in the April SDR.

## High-level summary of key findings

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### All students

5. The indicative data shows that number of students at tertiary education providers increased by 6.2% between 2020 and 2021. There was a large increase in domestic students (12%), while there was a substantial decrease in international students (down 31%).

### Domestic students

6. The indicative data shows the following (see Table 1 in Annex 1):
  - a. *Overall*. The rate of growth in students in 2021 was significantly higher than in previous years. The number of domestic students increased by 12% in 2021, compared with 0.7% in 2020, 0.3% in 2019, and 0.6% in 2018.
  - b. *Age group*. The number of students in all age groups increased significantly in 2021, but the largest rates of growth were seen in older age groups. The number of students in the under 25 age group increased by around 8%, while the 25-39 age groups increased by 20% and the 40 and over age group by 14%.
  - c. *Gender*. There were similar increases for both men (12%) and women (13%) in 2021.
  - d. *Ethnic group*. The number of students of all ethnic groups increased, although the rate of increase for Māori (7.7%) was lower than for Europeans (13%), Pacific Peoples (14%) and Asians (17%). A factor in this lower rate of growth for Māori students was that around a third of Māori enrolments are usually in wānanga, and enrolment growth in this subsector was relatively flat in 2021. Growth in Māori enrolments in 2021 in universities (11%) and Te Pūkenga (13%) was substantially higher than the overall rate (7.7%).

- e. *Subsector.* There was considerable variation in the growth rates of students across the subsectors. The largest rate of growth in domestic students in 2021 was seen in Te Pūkenga (23%), followed by private training establishments (15%), universities (8.8%), and wānanga (0.8%).
- f. *Level of study.* The largest rates of increase in students in 2021 were seen in Level 3-7 certificates/diplomas and postgraduate qualifications such as masters and postgraduate diplomas/certificates. For example, the increase in students in Level 3 certificates and Level 5-7 certificates/diplomas was 25%, in Level 4 certificates 16%, in masters degrees 17%, in postgraduate certificates 21%, and in postgraduate diplomas 18%. Although the rate of growth in students enrolling in bachelors degrees was lower (5.9%), because this represents a large group of students, the increase in actual student numbers (around 6,600) was still substantial.
- g. *Enrolled in previous year or not.* There was a substantial difference in the rate of growth in students who were enrolled in tertiary education in the previous year and those that weren't. The number of students who were not enrolled in tertiary providers in the previous year increased by 22% in 2021, compared to a growth rate of 7.3% in students who were enrolled in the previous year.

### **Field of study of domestic students**

7. The analysis below looks at the fields of study that have made the largest contribution to increased enrolments in 2021 by broad levels of study. In this analysis, enrolments are measured by the number of equivalent full-time students (EFTS) and field of study is classified using the narrow New Zealand Standard Classification of Education (NZSCED).

#### *Level 1 and 2 certificates*

8. At these foundation levels, the fields of study which contributed the most to the increase in study load in 2021 were Language and literature, followed by General education programmes.

#### *Level 3-7 certificates/diplomas*

9. In this grouping, the biggest contributor to the growth in study load in 2021 by some margin was in the field of Building. This was followed by Human welfare studies and services and Electrical and electronic engineering and technology.
10. Perhaps not surprisingly, in 2021 there was a significant decrease in study load in the field of Tourism.

#### *Bachelors degrees*

11. For bachelors degrees, the biggest contributors to the increase in study load in 2021 were in the fields of Nursing, Business and management, and Behavioural science.

*Graduate certificates/diplomas, honours degrees, postgraduate certificates/diplomas, masters and doctoral degrees*

12. In this grouping, which combines graduate certificates/diplomas with postgraduate qualifications, the biggest contributor to the increase in study load in 2021 was the field of Teacher education.

**International students**

13. The indicative data showed that the number of international students decreased by 31% between 2020 and 2021 (see Table 2 in Annex 1). In terms of level of study, there were relatively lower rates of decrease in multi-year qualifications (such as bachelors degrees and doctoral degrees).

**Further analysis of 2021 enrolments and completions**

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14. The Ministry will be undertaking a more in-depth analysis of enrolments in 2021, including what students have enrolled in and who they are, using data from the April SDR which is available in May. The April SDR data goes through more validations and quality control than the Indicative SDR which allows more robust and detailed analysis. We expect to brief you on this analysis in early June 2021.
15. The analysis will also look at previous recessions such as the GFC for comparison as well as the unusual effect of increases in both on-job and off-job enrolment numbers (not normally seen at the same time in an economic cycle).
16. We intend to repeat this exercise using full-year enrolment data for 2021 and incorporate an analysis of completions data to see how successful this large cohort of students were. This analysis should be ready around June 2022 after the April SDR data is processed.

**Proactive Release**

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17. We recommend that this briefing is proactively released as per your expectation that information be released as soon as possible. Any information which may need to be withheld will be done so in line with the provisions of the Official Information Act 1982.

**Annexes**

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- Annex 1: Statistical tables

## Annex 1: Statistical tables

Table 1: Number of domestic students and equivalent full-time students (EFTS) by various characteristics

Characteristic	Sub-category	Students			EFTS		
		2020	2021	% change	2020	2021	% change
Gender	Female	153,620	173,010	13%	101,375	112,975	11%
	Male	94,770	105,935	12%	62,010	68,260	10%
	Diverse	350	735	110%	250	520	108%
	Total	248,765	279,670	12%	163,660	181,770	11%
Ethnic group	European	158,385	178,900	13%	104,700	117,095	12%
	Māori	51,015	54,935	7.7%	33,130	35,475	7.1%
	Pacific Peoples	23,910	27,185	14%	15,875	17,970	13%
	Asian	41,350	48,530	17%	28,210	32,165	14%
	Other	12,585	14,415	15%	8,070	9,070	12%
	Total	248,765	279,670	12%	163,660	181,770	11%
Age group	Under 20	42,175	45,730	8.4%	33,060	35,685	7.9%
	20-24	89,310	96,080	7.6%	70,205	75,540	7.6%
	25-39	69,635	83,520	20%	37,755	45,330	20%
	40 and over	47,615	54,325	14%	22,615	25,200	11%
	Total	248,765	279,670	12%	163,660	181,770	11%
Subsector	Universities	131,595	143,160	8.8%	100,465	109,600	9.1%
	Te Pūkenga	71,310	87,675	23%	34,435	41,495	21%
	Wānanga	25,395	25,610	0.8%	15,885	15,295	-3.7%
	Private training establishments	23,790	27,450	15%	12,880	15,380	19%
	Total	248,765	279,670	12%	163,660	181,770	11%
Type/Level of study	Certificates 1	13,655	13,985	2.4%	3,410	3,660	7.3%
	Certificates 2	15,045	16,415	9.1%	4,395	4,495	2.3%
	Certificates 3	29,945	37,395	25%	12,035	14,670	22%
	Certificates 4	30,435	35,375	16%	13,225	14,790	12%
	Certificates/diplomas 5-7	27,095	33,745	25%	14,445	18,035	25%
	Bachelors degrees 7	110,645	117,220	5.9%	88,230	93,965	6.5%
	Graduate certificates/diplomas 7	6,275	7,180	14%	3,515	4,320	23%
	Honours degrees 8	12,985	14,015	7.9%	11,250	11,905	5.8%
	Postgraduate certificates 8	3,265	3,945	21%	1,150	1,365	19%
	Postgraduate diplomas 8	5,455	6,415	18%	2,560	3,140	23%
	Masters degrees 9	12,440	14,565	17%	6,680	8,255	24%
	Doctorates 10	4,285	4,445	3.7%	2,660	2,790	4.9%
	Total	248,765	279,670	12%	163,660	181,770	11%
Enrolled in tertiary education in previous year	Yes	161,210	172,925	7.3%	100,305	107,080	6.8%
	No	90,045	109,985	22%	63,355	74,690	18%
	Total	248,765	279,670	12%	163,660	181,770	11%

### Notes:

1. Data relates to students enrolled as at 1 March with a tertiary education provider in formal qualifications of greater than 0.03 EFTS (more than one week's full-time duration). The 2021 data was extracted on this 25 March 2021.
2. Data excludes all non-formal learning and on-job industry training.
3. Data includes those private training establishments that received Student Achievement Component funding, and/or had students with student loans or allowances, and/or Youth Guarantee programmes.
4. Students are counted in each ethnic group they identify with, so the sum of the various ethnic groups may not add to the total.
5. Students are counted in each qualification type/NZQF level they enrol in, so the sum of the various types/levels may not add to the total.
6. Age is calculated as at 31 December.
7. Totals also include those students with unknown values.
8. Data in this table, including totals, have been rounded to the nearest 5 to protect the privacy of individuals, so the sum of individual counts may not add to the total.

Table 2: Number of International students and equivalent full-time students by type/level of study

Type/level of study	Students			EFTS		
	2020	2021	% change	2020	2021	% change
Certificates 1	390	380	-2.6%	185	210	14%
Certificates 2	365	95	-74%	75	30	-60%
Certificates 3	475	255	-46%	190	90	-53%
Certificates 4	2,010	885	-56%	860	330	-62%
Certificates/diplomas 5-7	4,580	2,580	-44%	2,460	1,370	-44%
Bachelors degrees 7	16,225	13,170	-19%	10,350	8,385	-19%
Graduate certificates/diplomas 7	4,130	1,315	-68%	2,735	830	-70%
Honours degrees 8	1,065	1,090	2.3%	890	865	-2.8%
Postgraduate certificates 8	115	110	-4.3%	55	40	-27%
Postgraduate diplomas 8	2,545	745	-71%	1,480	345	-77%
Masters degrees 9	6,495	4,635	-29%	3,995	2,240	-44%
Doctorates 10	4,175	3,990	-4.4%	3,085	2,895	-6.2%
Total	41,705	28,860	-31%	26,385	17,645	-33%

Notes:

1. Data relates to students enrolled as at 1 March with a tertiary education provider in formal qualifications of greater than 0.03 EFTS (more than one week's full-time duration). The 2021 data was extracted on this 25 March 2021.
2. Data excludes all non-formal learning and on-job industry training.
3. Data includes those private training establishments that received Student Achievement Component funding, and/or had students with student loans or allowances, and/or Youth Guarantee programmes.
4. Students are counted in each qualification type/NZQF level they enrol in, so the sum of the various types/levels may not add to the total.
5. Totals also include those students with unknown values.
6. Data in this table, including totals, have been rounded to the nearest 5 to protect the privacy of individuals, so the sum of individual counts may not add to the total.