Tertiary Education Commission
Te Amorangi Mātauranga Matua

Tertiary Education Report: April 2022 Enrolment Update

Date:	10 June 2022	**TEC priority:**	Low
Security level:	In Confidence	**Report no:**	B-22-00264
		Minister's office No:	

ACTION SOUGHT		
	Action sought	**Deadline**
Hon Chris Hipkins Minister of Education	**Note** the sector's enrolment data following the April 2022 Single Data Return (SDR); **Note** the TEC will provide a Fees Free update in a separate briefing; **Note** the TEC will publish enrolment data in June; and **Agree** for the TEC to proactively release this briefing in due course.	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	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	☐ See Minister's Notes	☐ Withdrawn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:

Executive Summary

1. This briefing provides a summary of TEC-funded enrolments as at April 2022 compared to April 2020 and April 2021. Overall, there was a decline in learner numbers compared to April 2021, which was a turnaround from the record enrolment increase from April 2020 to April 2021. The enrolment numbers in April 2022 have, however, slightly increased compared to April 2020.

2. The number of provider-based learners dropped by 14,975 (-5.0%) compared to April 2021. The decline was led by decreased enrolments at SAC level 3 and above, which were down by 12,965 learners (-4.6%) from the previous year. All subsectors saw decreases at SAC level 3 and above and foundation-level education, although the changes were not evenly distributed. The reduction in SAC level 3 and above learners was led by Te Pūkenga with a decrease of 4,145 learners (-5.0%) compared to April 2021, followed by wānanga which saw a decrease of 3,830 learners (-16.9%).

3. The Industry Training Fund supported 102,555 learners, an increase of 3.3% compared to April 2021. This was driven by an increase in the number of apprentices, which were up 6,855 (12.4%) from April 2021, and up a significant 61.6% from April 2020. In contrast, trainee numbers decreased by 3,660 (-8.1%) compared to April 2021. This decrease in trainee numbers was more than offset by the increase in apprentice numbers.

Recommendations

Hon Chris Hipkins, Minister of Education

It is recommended that you:

1. **note** the sector's enrolment data following the April 2022 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 June 2022; and

4. **agree** for the TEC to proactively release this briefing in due course.

AGREED / NOT AGREED

Gillian Dudgeon

Deputy Chief Executive, Delivery

10 June 2022

Hon Chris Hipkins

Minister of Education

30 / 06 / 22

Purpose

1. This paper provides an update on enrolment trends as at April 2022 compared to April 2021 and April 2020. In this timeframe, we can see the impact of COVID-19 and the Government's response.

2. The paper focuses on enrolments across three funds: Student Achievement Component (SAC), Youth Guarantee (YG), and the Industry Training Fund (ITF)[1].

3. Enrolments in the paper are cumulative and reflect all known enrolments for the calendar year. The figures used include known enrolments as at April for reporting years 2022, 2021 and 2020[2]. These figures will differ to the Ministry of Education update due to different data extraction dates.

Background: The Government's response to COVID-19

4. In 2020, the TEC provided three key funding initiatives to support the tertiary education sector through COVID-19: the Targeted Training and Apprenticeship Fund (TTAF), the Hardship Fund for Learners (HAFL) and the Technology Access Fund for Learners (TAFL).

    a. In July 2020, the TTAF was introduced to cover fees for learners in all apprenticeships and a range of sub-degree level programmes until 31 December 2022. It targets industry areas that are expected to grow, or where more skills are needed, as New Zealand recovers from the social and economic impacts of COVID-19.

    b. The HAFL, established May 2020, allocated $19.5 million to 120 tertiary education organisations (TEOs) to provide financial assistance to learners facing hardship due to COVID-19. This fund was extended into 2021 with an additional $10 million allocated with the inclusion of technology-related costs. An additional $20 million was made available for allocation in September 2021 in response to the COVID-19 restrictions beginning on 17 August 2021.

    c. Also established May 2020, the TAFL allocated $15.8 million to TEOs to provide devices and internet connections to learners unable to access online learning. TAFL funding was subsequently incorporated with HAFL; HAFL covers hardship and technology-related costs.

5. The industry training subsector was further supported by the Apprenticeship Boost initiative (ABI), a multi-agency COVID-19 response initiative introduced in August 2020. Under ABI, employers receive payments that help them to retain and take on new apprentices, enabling apprentices to train and earn while the subsector recovers from the economic impacts of COVID-19. The ABI is available to employers until 31 December 2023.

6. The decline in enrolments is a turnaround from the previous year, when enrolment numbers saw a significant increase from April 2020 to April 2021. However, enrolment numbers in April 2022 remained higher in comparison to April 2020.

The number of learners enrolled declined compared to last year

7. In April 2022, overall provider-based enrolments dropped by 14,975 learners (-5.0%), to a total of 283,710 learners compared to April 2021. This was in contrast to enrolment trends from April 2020 to April 2021, when the number of learners significantly increased.

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[1] Data extracted as at 20 May 2022 from the April 2022 Single Data Return (SDR) and 28 May 2022 from the Industry Training Register (ITR) for the period ending 30 April 2022. Please note data is subject to change.
[2] Data for 2022 is not yet finalised and is subject to revision.

a. The number of learners enrolled at SAC level 3 and above dropped by 12,965 learners (-4.6%) to a total of 269,225 learners in April 2022. The largest decrease was in learners enrolled at the sub-degree level, down 9,800 (-8.5%) learners, compared to a drop of 3,850 (-2.2%) at degree level and above.

b. SAC levels 1 and 2 learners decreased by 1,335 (-9.4%) learners to a total of 12,830 learners in April 2022 compared to last April. This was 250 (-1.9%) less than in April 2020.

c. Youth Guarantee learner numbers have continued to decline. In April 2022, there were 980 (-22.9%) less learners reported than in last April. This was the largest percentage drop across all funds.

8. In April 2022, the number of learners in industry training increased by 3,310 learners (3.3%) compared to April 2021. The rate of increase in industry training numbers has slowed down after the significant increases from 2020 to 2021 followed by the introduction of the TTAF in July 2020 and the ABI in August 2020.

9. Table 1 shows the number of learners across the SAC, YG and ITF funds. Table 2 shows the number of EFTS/STMs across the same funds. The tables show how enrolment levels have changed following COVID-19 restrictions.

Table 1: April 2022 learner numbers and changes from April 2021 and April 2020[3]

		April 2021 to April 2022		April 2020 to April 2022	
Fund	**April 2022**	**Change**	**Percentage**	**Change**	**Percentage**
SAC level 3 and above	269,225	-12,965	-4.6%	+17,845	+7.1%
SAC levels 1 and 2	12,830	-1,335	-9.4%	-250	-1.9%
Youth Guarantee	3,295	-980	-22.9%	-1,090	-24.9%
Total provider-based learners	**283,710**	**-14,975**	**-5.0%**	**+16,680**	+6.2%
Industry Training Fund learners	**102,555**	**+3,310**	**+3.3%**	**+19,240**	**+23.1%**

Table 2: April 2022 EFTS/STMs and changes from April 2021 and April 2020

		April 2021 to April 2022		April 2020 to April 2022	
Fund	**April 2022**	**Change**	**Percentage**	**Change**	**Percentage**
SAC level 3 and above	174,240	-12,465	-6.7%	+5,725	+3.4%
SAC levels 1 and 2	6,700	-885	-11.7%	-65	-1.0%
Youth Guarantee	1,750	-590	-25.2%	-685	-28.1%
Total provider-based EFTS	**182,690**	**-13,945**	**-7.1%**	**+4,975**	**+2.8%**
Industry Training Fund STMs	**17,585**	**+1,400**	**+8.6%**	**+3,525**	**+25.1%**

SAC level 3 and above enrolments declined across all subsectors

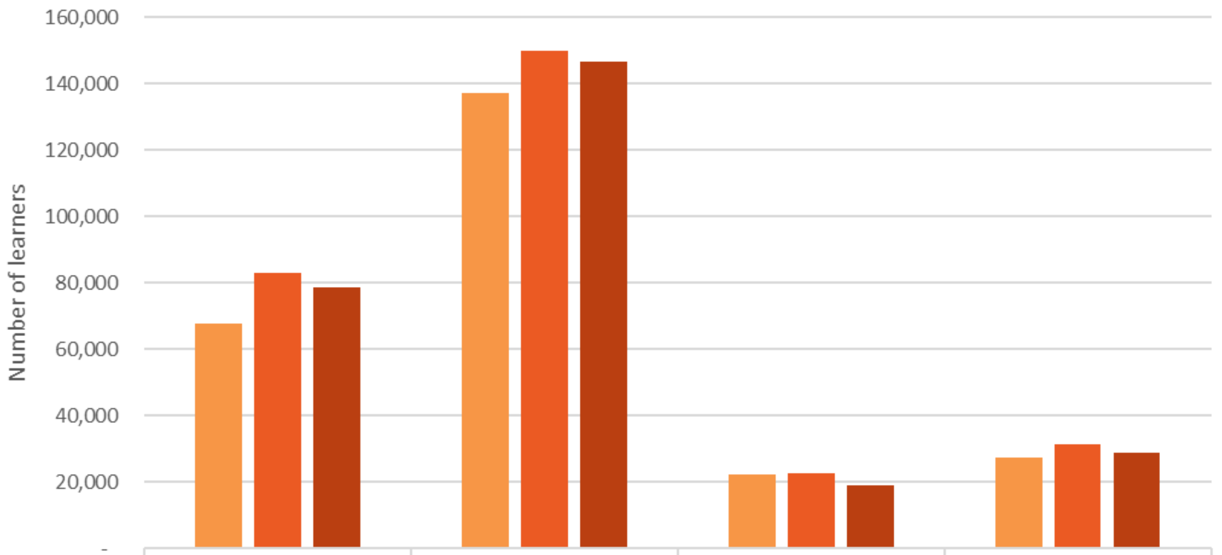
10. The number of learners enrolled at SAC level 3 and above saw decreases across all subsectors and most levels of study. Table 3 shows the changes in enrolments at SAC 3 level and above. Chart 1 shows the number of learners enrolled in each subsector in 2020, 2021, and 2022 for the reporting period as at April.

[3] All values in this briefing have been rounded to the nearest five. Due to rounding, underlying values may not add up exactly to the total values.

Table 3: April 2022 enrolment numbers by subsector and changes from April 2021 and April 2020 (SAC level 3 and above)[4]

		April 2021 to April 2022		April 2020 to April 2022	
Subsector	**April 2022**	**Change**	**Percentage**	**Change**	**Percentage**
Te Pūkenga	78,700	-4,145	-5.0%	10,865	16.0%
University	146,750	-2,970	-2.0%	9,545	7.0%
Wānanga	18,865	-3,830	-16.9%	-3,435	-15.4%
PTE	28,760	-2,520	-8.1%	1,285	4.7%
Provider Total	**269,225**	**-12,965**	**-4.6%**	**17,845**	**7.1%**

Chart 1: SAC level 3 and above number of learners by subsector from April 2020 to April 2022



	Te Pūkenga	University	Wānanga	PTE
April 2020	67,835	137,205	22,300	27,475
April 2021	82,845	149,720	22,695	31,280
April 2022	78,700	146,750	18,865	28,760

11. Te Pūkenga reported a decline of 4,145 learners (-5.0%) enrolled at SAC level 3 and above. This followed the significant increase from 2020 to 2021. Te Pūkenga showed decreases across nearly all levels of study, except for levels 5 to 7 (non-degree) where enrolments increased by 5.6%.

12. There were enrolment decreases across all Te Pūkenga subsidiaries from April 2021 to April 2022, except for Manukau Institute of Technology Ltd (MIT) and Open Polytechnic of New Zealand Ltd (Open Poly) which saw enrolment increases. The number of learners at MIT and Open Poly rose by 720 learners (18.3%), and 240 learners (1.1%) respectively. Toi Ohomai Institute of Technology saw the largest decrease in learner numbers, which fell by 710 learners (-12.0%). Tai Poutini Polytechnic Ltd and NorthTec Ltd had the largest percentages decreases in learner numbers of all the subsidiaries, each decreasing by more than 20% compared to April 2021.

13. University enrolments were down by 2,970 learners (-2.0%) to a total of 146,750 learners from April 2021. The decrease was mostly driven by enrolments at level 7 degree (down 2,865 learners, -2.9%). Enrolment numbers decreased across all universities from April 2021 to April 2022, except for University of Canterbury and Lincoln University where enrolments increased.

[4] Learners can be double counted when 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.

University of Canterbury's enrolment numbers increased by 515 learners (3.1%) and Lincoln University's enrolment numbers increased by 105 learners (4.6%) compared to last April. Massey University experienced the largest enrolment decrease in the university subsector, with a drop of 2,375 learners (-9.5%) from April 2021 to April 2022. Most of the decrease was driven by the enrolment drop at level 7 degree (down by 1,700 learners, -11.2%).

14. Most of the providers within the PTE subsector also reported reduced enrolments compared to April 2021, with a total decrease of 2,520 learners (-8.1%), to a total of 28,760 learners in April 2022. Most of the decrease in enrolments was at level 4, which represented 92.9% of the total decrease in PTE enrolments.

15. The wānanga subsector saw the largest percentage decrease in enrolments, with learner numbers down 3,830 (-16.9%) from April 2021 to a total of 18,865 learners in April 2022. This was the only subsector to see reduced enrolments compared to April 2020, which were down by 3,435 learners (-15.4%). The drop in learner numbers was mostly at level 3 and level 4, with decreases of 2,060 learners (-18.0%) and 1,875 learners (-21.1%) respectively.

16. The wānanga subsector saw fewer enrolments and higher course withdrawals in 2020 and 2021 due to the social and financial impacts of COVID-19. For example, learners at Te Wānanga o Aotearoa and Te Whare Wānanga o Awanuiārangi did not enrol or withdrew from courses as the delivery mode (eg, face-to-face, noho and marae-based learning) was no longer available.

More learners are enrolled in Information Technology and Health

17. Overall, most of the 12 qualification subject areas showed decreased enrolments, except for *Information Technology* and *Health*:

- Enrolments in *Information Technology* subject area increased by 2,000 learners (30.8%) to a total of 8,490 learners. The increase was mostly at sub-degree level, and follows the inclusion of *Information Technology* as a TTAF target area in January 2021[5];

- *Health* subject area increased slightly by 590 learners (1.6%) to a total of 36,595 learners.

However, all the other subject areas saw decreases in enrolments:

- *Management and Commerce* decreased by 4,590 learners (-9.5%) to a total of 43,650 learners. Enrolments at nearly all levels of study dropped;

- *Society and Culture* decreased by 4,610 learners (-6.8%) to a total of 63,215 learners in April 2022. The decrease was driven by a fall of enrolments at level 4.

Learner ethnicity changed slightly, gender demographics remain largely unchanged

18. Most of the ethnicity representations for learners enrolled at SAC level 3 and above have had little or no changes from last April with a few exceptions. Learners identifying as European represented 63.2% of learners, followed by Māori at 17.9% (down 0.9% from last April), Asian at 18.4% (up 1.4% from April 2021), and Pacific Peoples at 9.7% (up 0.2%).[6]

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[5] Target areas covered under TTAF include the following areas: Community support; Construction; Electrical Engineering; Manufacturing and mechanical engineering and technology; Primary Industries; and Road Transport. New and expanded TTAF target areas eligible from 1 January 2021 included conservation, information technology, and an expanded scope within community support. TTAF also includes all apprentices not covered by a target area.

[6] A learner may identify with more than one ethnicity and will be counted in each ethnicity they identify with. The proportions of people belonging to each ethnic group do not add up to 100 percent.

19. Female learners have continued to represent the majority of learners at 61.6%, followed by male learners at 37.9% and those identifying as another gender[7] at 0.5%.

More learners are aged under 25

20. While enrolments for learners in all age groups dropped, the overall proportions of learners in each age group have remained unchanged from April 2021. Learners aged under 25 represented 51.1% of all SAC level 3 and above learners in April 2022. However, learners aged under 25 accounted for 62.7% of the EFTS enrolments in April 2022 as more learners in this age group tend to study full-time than older learners.

Foundation-level enrolments dropped significantly

21. In April 2022, learners enrolled in foundation learning (SAC levels 1 and 2 and Youth Guarantee) declined by 2,305 learners (-12.5%) to 16,105 learners. This number was 1,325 learners (-7.6%) lower when compared to April 2020.

22. The decrease in foundation-level enrolments was driven by the drops in both SAC levels 1 and 2 and Youth Guarantee enrolments. Learners enrolled at SAC levels 1 and 2 fell by 1,335 learners (-9.4%) between April 2021 and April 2022. Youth Guarantee enrolments fell by 980 learners (-22.9%) in the same period. The decline in Youth Guarantee continues a trend from at least 2016, the decline between 2021 and 2022 was higher than recent years (Youth Guarantee 15.4% between 2019 and 2020).

23. Male learners dropped much faster than female learners for foundation-level enrolments. Male learners fell by 1,280 learners (-20.2%) while female learner number dropped by 1,080 learners (-9.0%). Male and female learners account for 31.4% and 68.0% of the foundation-level enrolments respectively.

24. Most of the foundation-level learners were identified as European at 56.6% (up 3.0% from April 2021), followed by learners identified as Māori at 44.1%, learners identified as Pacific peoples accounted for 9.0% (down 1.3%) of the total, and Asian learners at 8.4% (down 0.8%).

25. The proportion of learners aged 25 and over (in SAC levels 1 and 2 only) increased by 2.0% to 65.9% in April 2022. Learners aged under 25 (including Youth Guarantee) accounted for 34.1% of the SAC levels 1 and 2 and YG learners.

Apprentice numbers continue to rise

26. In April 2022, the industry training sector experienced an overall increase in enrolments, up 2,525 learners (2.5%) from April 2021 to 102,555 learners. This shift followed the introduction of the two COVID-19 response initiatives noted above, TTAF and ABI. Table 4 shows the number of trainees and apprentices in April 2022 and the changes compared to April 2021 and April 2020. Table 5 shows the STMs for April 2022 compared to April 2021 and April 2020.

[7] In April 2021, Stats NZ updated their Sex and gender statistical standards, whereby the "Gender diverse" response category was changed to "Another gender". The “Another gender” (Gender diverse) reporting option is only available in the SDR.

Table 4: April 2022 Industry Training enrolment numbers and changes from April 2021 and April 2020

		April 2021 to April 2022		April 2020 to April 2022	
Learner Type	**April 2022**	**Change**	**Percentage**	**Change**	**Percentage**
Traineeships	41,465	-3,660	-8.1%	-3,890	-8.6%
Apprenticeships	62,000	+6,855	+12.4%	+23,625	+61.6%
Total	**102,555**	**+3,310**	**+3.3%**	**+19,240**	**+23.1%**

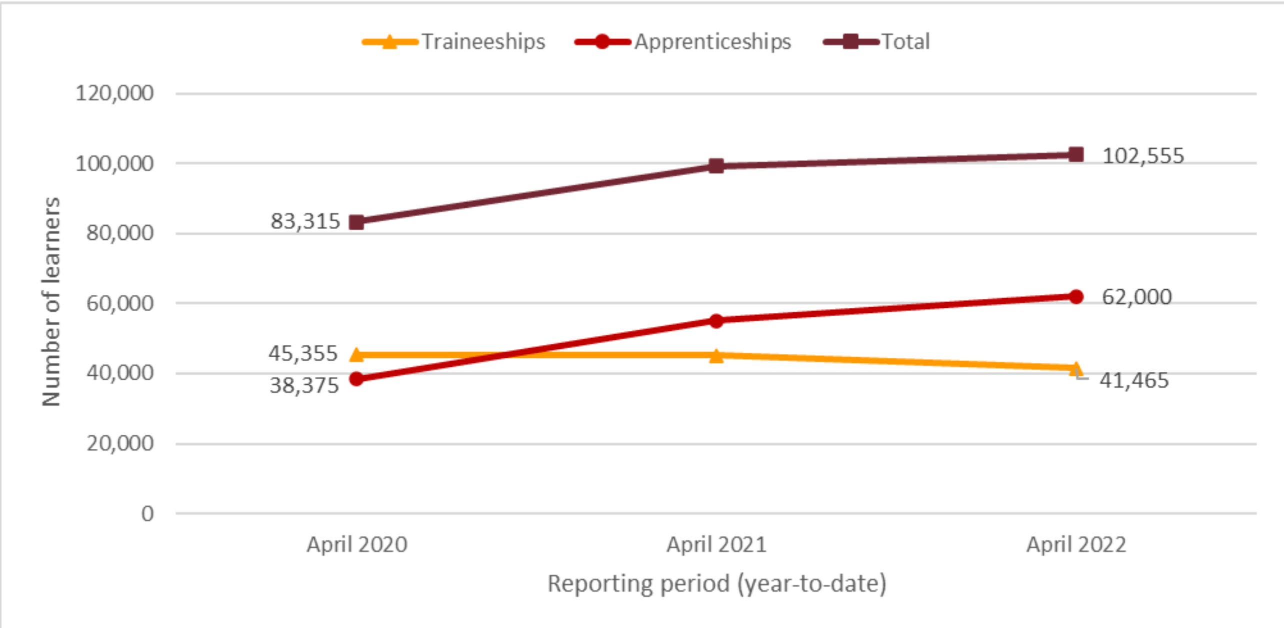
Table 5: April 2022 Industry Training STMs and changes from April 2021 and April 2020

		April 2021 to April 2022		April 2020 to April 2022	
Learner Type	**April 2022**	**Change**	**Percentage**	**Change**	**Percentage**
Traineeships	6,350	-270	-4.1%	-645	-9.2%
Apprenticeships	11,235	+1,670	+17.5%	+4,170	+59.0%
Total	**17,585**	**+1,400**	**+8.6%**	**+3,525**	**+25.1%**

27. The number of apprentices increased by 6,855 learners (12.4%) to 62,000 in April 2022 from April 2021. This represented a 61.6% increase from April 2020. It reflects the strong labour market, a range of wage subsidy supports including ABI, and free apprenticeship training through TTAF.

28. In contrast, trainee numbers have decreased by 3,660 learners (-8.1%) to a total of 41,465 learners between April 2021 and April 2022. Since April 2020, traineeships have decreased by 8.6%. The fall in trainee numbers, however, has been more than offset by the boost in apprenticeship learners. Chart 2 shows the number of learners in apprenticeships and traineeships from April 2020 to April 2022.

Chart 2: Industry Training Fund Enrolments by learner type from April 2020 to April 2022



Demographics of apprentices are changing: there is more representation of females, Asian and older learners

29. Although males continue to represent the majority of apprentices, the proportion of female apprentices increased by 1.2 percentage points to 15.1% of all apprentices in April 2022. The

number of female apprentices has increased 22.5%, from 7,660 learners in April 2021 to 9,380 learners in April 2022.

30. The change in female apprentice numbers was led by an increase in *Retail Trade*, *Health Care and Social Assistance*, and *Construction* industries. Together they accounted for 69.8% of the total increase in female apprentices from April 2021 to April 2022.

31. The shift in ethnicity demographics has continued, with the proportion of learners identifying as European down 1.9 percentage points from the previous year, while learners identifying as Asian increased by 0.7 percentage points and learners identifying as Pacific peoples increased by 0.6 percentage points. Overall, most learners identified as European (65.7%), followed by Māori (18.4%), Asian (8.0%), and Pacific Peoples (7.4%).

32. The age demographics of apprenticeship enrolments remained largely unchanged from last year, with the proportion of learners aged 25 and over slightly increased by 0.2% to 47.6% of the total apprentices. However, when comparing April 2020 and April 2022, the proportion of learners aged 25 and over have increased by 5.5 percentage points.

Data caveats

33. The SDR data in this briefing is for enrolment reporting purposes and includes all funding related to SAC and YG[8].

34. 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.

35. The ITR data relates to enrolments in industry-based training which occur throughout the year. Enrolment numbers are subject to change and are not comparable to previous years or more recent months.

36. 2022 data is interim and has not been finalized. Values are therefore subject to revision as data is updated.

We will update you following the April 2022 SDR

37. We will provide you with an enrolment update covering SAC, YG, and the ITF following the completion of the August 2022 SDR.

38. We will update you on Fees Free enrolments as at April 2022 in a separate briefing when the data has been finalised.

[8] Includes SAC levels 1 and 2 (which contains aggregate data for the following funds: SAC levels 1 and 2 Plan Process funding; SAC Level 1 & 2 Competitive Process Funding; and Māori Pasifika 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, Māori and Pasifika Trades Training levels 3 and 4, and ICT Graduate Schools).