

Tertiary Education Report: Fees-free demographic data as at April 2018

Date:	8 August 2018	TEC priority:	Medium
Security level:	In Confidence	Report no:	B/18/00460
		Minister's office No:	

ACTION SOUGHT		
	Action sought	Deadline
Hon Chris Hipkins Minister of Education	note the demographic data on fees-free learners collected from April 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
Enclosure: Yes	Round Robin: Yes	

CONTACT FOR TELEPHONE DISCUSSION (IF REQUIRED)				
Name	Position	Telephone		1st contact
Tim Fowler	Chief Executive	Section 9(2)(a)	Section 9(2)(a)	
Section 9(2)(a)	Chief Advisor		Section 9(2)(a)	✓

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 Withdrawn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

Hon Chris Hipkins, Minister of Education

It is recommended that you:

1. **note** the demographic data on fees-free learners collected from April 2018 enrolment data submitted by tertiary education organisations in the Single Data Return, Industry Training Register and manual fees-free enrolment returns; and
2. **agree** that the TEC release this briefing in full at the same time as release of briefing B/18/00160, *April 2018 enrolments at tertiary education organisations.*

AGREED / NOT AGREED



Tim Fowler

Chief Executive

Tertiary Education Commission

8 August 2018

Hon Chris Hipkins

Minister of Education

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Purpose

1. This briefing provides you with demographic data on fees-free learners, sourced from the tertiary education organisation (TEO) enrolment data collected as at April 2018.

Background

2. In May 2018 we provided you with high-level enrolment data for TEOs, including fees-free, as at April 2018 [B/18/00160 refers].
3. Your office requested additional data on learner demographics including regional data. We have undertaken an analysis of the April enrolment returns looking at key high-level demographic traits of fees-free learners and compared them to the demographic traits of all enrolled learners as at the April enrolment returns. This paper does not make any comment on learner motivations or behaviour regarding their enrolment into tertiary education.

TEOs submit most enrolment data to the TEC through two data collection systems based on fund and TEO type

4. For tertiary providers¹ enrolment data is collected through the Single Data Return (SDR). For industry training organisations (ITOs) enrolment data is collected through the Industry Training Register (ITR).
5. Although fees-free data is submitted monthly through a separate bespoke manual process, we can only verify and do comparisons with all enrolment data three times a year when the SDR is submitted in April, August and December. The April enrolment returns show that there are about 2,000 National Student Numbers (NSNs) in the SDR that appear to be fees-free eligible but have not been included in the fees-free reporting submitted by providers. The fees-free manual enrolment reports are showing small but steady increases each month since April. These increases will be verified against enrolment returns when they are submitted in mid-August.

There were 33,500 eligible NSNs enrolled in fees-free eligible qualifications² as at April

6. As at April 2018 there were 33,500 eligible NSNs enrolled in fees-free across all TEO. Of these, there were 33,300 unique individual NSNs. The remaining NSNs relate to people that are enrolled with more than one TEO. We do not yet have sufficient data to analyse fees at an equivalent full-time student (EFTS) level.

¹ Institutes of technology and polytechnics (ITPs), private training establishments (PTEs), universities and wānanga.

² Funded through eligible sources of funding at New Zealand Qualifications Framework (NZQF) level 3 or above.

Younger learners are the main recipients of fees-free

7. Most people enrolled in fees-free are 19 years old or under - 83.8% in Student Achievement Component (SAC) and 68.1% in the Industry Training Fund (ITF). Table One below indicates that the age profile of initial fees-free enrolments differs quite significantly from the current profile of all enrolments in both SAC and ITF.
8. We expect that most enrolments are coming from people who finished school very recently, most likely in 2017 (the up to 19 years age band). Older learners are less likely to meet the eligibility criteria to receive fees-free.

Table One: Fees-free April 2018 enrolments by age compared to all enrolments

Age band	SAC Level 3+				ITF			
	All students		Fees-free students		All learners		Fees-free learners	
	Students	Proportion	Students	Proportion	Learners	Proportion	Learners	Proportion
Up to 19 years	52,504	20.5%	27,390	83.8%	7,314	9.2%	816	68.1%
20 – 24 years	83,099	32.5%	3,015	9.2%	20,565	25.9%	182	15.2%
25 – 34 years	54,771	21.4%	1,000	3.1%	25,162	31.7%	132	11.0%
35 – 44 years	32,249	12.6%	637	1.9%	12,199	15.4%	50	4.2%
45 – 54 years	21,757	8.5%	468	1.4%	8,942	11.3%	9(2)(a)	9(2)(a)
55 years and over	11,277	4.4%	171	0.5%	5,211	6.6%	9(2)(a)	9(2)(a)
Total	255,657	100.0%	32,681³	100.0%	79,393		1,199	

European learners are the main recipients of fees-free

9. Table Two has a breakdown of data by ethnicity. It shows that a higher proportion of fees-free enrolments identify as European (70.9% in SAC and 79.4% in ITF) when compared with the proportion of all enrolments that identify as European (66.5% in SAC and 63.3% in ITF).
10. This initial data also shows that a lower proportion of Māori are accessing fees-free in SAC compared to the proportion of all Māori SAC enrolments. This proportion may change as second semester enrolments are received and following the August 2018 SDR we will run this analysis again. In contrast, the ITF Māori fees-free enrolments are similar to all Māori enrolments.
11. Pasifika proportions in both SAC and ITF enrolments for fees-free are similar to all Pasifika enrolments and in the case of SAC is slightly increased. The only notable difference is that Asian ITF enrolments account for 10.3% of all learner enrolments but only 3% of fees-free enrolments.

³ This total of 32,681 differs from the figures noted in paragraph six because it includes students that have accessed some fees-free entitlement but are not reported in the SDR. This is due to students who may have initially enrolled in a qualification subsequently withdrawing within the period for which a provider is not able to claim TEC funding and therefore is not reported.

Table Two: Fees-free April 2018 enrolments by ethnicity compared to all enrolments

Ethnicity	SAC Level 3+				ITF			
	All students		Fees-free students		All learners		Fees-free learners	
	Students	Proportion	Students	Proportion	Learners	Proportion	Learners	Proportion
Asian	43,833	17.1%	5,237	16.0%	8,175	10.3%	36	3.0%
European	170,090	66.5%	23,163	70.9%	50,261	63.3%	952	79.4%
Māori	51,366	20.1%	5,165	15.8%	12,922	16.3%	203	16.9%
Middle Eastern/Latin American/African	7,860	3.1%	790	2.4%	1,508	1.9%	23	1.9%
Pacific Peoples	24,019	9.4%	3,539	10.8%	5,912	7.4%	84	7.0%
Other Ethnicity	6,872	2.7%	529	1.6%	1,372	1.7%	5	0.4%
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

* Learners can be counted up to three times if they have disclosed three ethnicities (therefore the totals in this table have not been included as they overstate total enrolments).

* The ethnicities above only relate to domestic students and does not include international students.

12. Further information on Māori and Pasifika enrolments by age are detailed in Appendix One. The Māori age fees-free enrolments profile is similar to that of the all ethnicities age fees-free enrolments profile in Table Two with the majority of enrolments in younger age bands. This seems to indicate that age may be the biggest driver for fees-free enrolments in 2018. The fees-free Māori enrolments age profile does not match the age profile for all SAC Māori enrolments. All Māori enrolments are spread across the different age bands with half of all enrolments in the 20 to 34 age bracket and only 16.9% of enrolments in the up to 19 years age bracket.

Gender fees-free splits in SAC align to all SAC enrolments but differ in ITF

13. More than half of fees-free enrolments in SAC are female students (58.1%). This aligns with the all enrolments cohort and trends in recent years of increasing female enrolments in tertiary education.
14. ITF fees-free enrolments are dominated by males (92.3%). This proportion in fees-free male is significantly greater than all ITF male enrolments (71.8%). This is likely due to the fact that over two-thirds of fees-free ITF enrolments are in construction-related training programmes with over 40% in carpentry alone. These industries are dominated by male trainees.

Table Three: Fees-free April 2018 enrolments by gender compared to all enrolments

Gender	SAC Level 3+				ITF			
	All students		Fees-free students		All learners		Fees-free learners	
	Students	Proportion	Students	Proportion	Learners	Proportion	Learners	Proportion
Female	156,232	61.1%	19,004	58.1%	2,117	27.9%	91	7.6%
Male	99,425	38.9%	13,677	41.9%	56,998	71.8%	1,107	92.3%
Totals	255,657	100.0%	32,681⁴	100.0%	79,393		1,199	

Region of delivery/study

15. A regional breakdown of all fees-free enrolments is included in Appendix Two. The regional distribution of fees-free SAC enrolments is very similar to all enrolments. The distribution across regions reflects locations of large TEO campuses, particularly the universities and ITPs.
16. ITOs are national organisations and don't have campuses, so for ITF enrolled learners, the region of the learner's employer is reported. Most of the fees-free ITF enrolments seem to mirror all ITF enrolments. The two notable exceptions are Auckland which has 25.7% proportion of all ITF enrolments compared to 33.9% of fees-free ITF enrolments, and Canterbury which has 14.9% of all ITF enrolments compared to 7.9% of fees-free ITF enrolments. It is likely that this is due to the fact that over two-thirds of ITF fees-free eligible enrolments are in construction-related training programmes, and that the Auckland region is experiencing significant demand for construction related workers.

Additional analysis will be conducted on all data collected

17. The August enrolment returns will provide the next check-in point to more accurately conduct an analysis on eligible fees-free enrolments at providers. The fees-free monthly TEO reports will continue to give us a sense of fees-free provider enrolments.

Publicly communicating enrolment data and release of this briefing

18. We would like to discuss with you and your office how and when you would like to publicly communicate the fees-free specific data. For the last few years the TEC has published high-level sector and individual TEO SDR enrolment data after each reporting period. This tends to happen a couple of months following submission of the SDR. The TEC is currently considering the options for publishing fees-free data on its website. We will keep your office informed.
19. We recommend that you proactively release this briefing in full at the same time that you release our previous briefing to you (B/18/00160, *April 2018 enrolments at tertiary education organisations*).

⁴ This total of 32,681 differs from the figures noted in paragraph six because it includes students that have accessed some fees-free entitlement but are not reported in the SDR. This is due to students who may have initially enrolled in a qualification subsequently withdrawing within the period for which a provider is not able to claim TEC funding and therefore is not reported.

Appendix One – Enrolments by age and ethnicity

Māori students by age band

Table Four: Fees-free enrolments April 2018 – Māori students by age band

Age band	SAC Level 3+				ITF			
	All students		Fees-free students		All learners		Fees-free learners	
	Students	Proportion	Students	Proportion	Learners	Proportion	Learners	Proportion
Up to 19 years	8,658	16.9%	4,065	78.7%	1,301	10.1%	120	59.1%
20 – 24 years	13,061	25.4%	641	12.4%	3,510	27.2%	42	20.7%
25 – 34 years	12,573	24.5%	250	4.8%	4,003	31.0%	31	15.3%
35 – 44 years	7,912	15.4%	115	2.2%	1,906	14.8%	9(2)(a)	9(2)(a)
45 – 54 years	5,592	10.9%	67	1.3%	1,423	11.0%	9(2)(a)	9(2)(a)
55 years and over	3,570	7.0%	27	0.5%	779	6.0%	-	0.0%
Totals	51,366	100.0%	5,165	100.0%	12,922	100.0%	203	

Pasifika students by age band

Table Five: Fees-free enrolments April 2018 – Pasifika students by age band

Age band	SAC Level 3+				ITF			
	All students		Fees-free students		All learners		Fees-free learners	
	Students	Proportion	Students	Proportion	Learners	Proportion	Learners	Proportion
Up to 19 years	5,856	24.4%	2,979	84.2%	419	7.1%	44	52.4%
20 – 24 years	8,281	34.5%	317	9.0%	1,285	21.7%	16	19.0%
25 – 34 years	5,134	21.4%	115	3.2%	2,019	34.2%	16	19.0%
35 – 44 years	2,754	11.5%	78	2.2%	1,130	19.1%	9(2)(a)	9(2)(a)
45 – 54 years	1,525	6.3%	41	1.2%	728	12.3%	9(2)(a)	9(2)(a)
55 years and over	469	2.0%	9	0.3%	331	5.6%	-	0.0%
Totals	24,019	100.0%	3,539	100.0%	5,912	100.0%	84	

Appendix Two - Table Six: SAC level 3 and above April 2018 by region of delivery/study

Learners are counted more than once if they are studying in more than one region (so the proportion of students adds to more than 100%).

Region	SAC Level 3+				ITF			
	All students		Fees-free students		All learners		Fees-free learners	
	Students	Proportion	Students	Proportion	Learners	Proportion	Learners	Proportion
Northland	3,397	1.3%	279	0.9%	2,430	3.0%	44	3.7%
Auckland	85,177	33.3%	11,693	35.8%	20,477	25.7%	407	33.9%
Waikato	17,746	6.9%	2,325	7.1%	7,506	9.4%	113	9.4%
Bay of Plenty	10,085	3.9%	1,018	3.1%	6,092	7.6%	98	8.2%
Gisborne	1,553	0.6%	77	0.2%	869	1.1%	13	1.1%
Hawke's Bay	3,473	1.4%	337	1.0%	2,909	3.6%	44	3.7%
Taranaki	1,870	0.7%	172	0.5%	2,200	2.8%	36	3.0%
Manawatu-Wanganui	10,244	4.0%	1,337	4.1%	4,085	5.1%	64	5.3%
Wellington	33,535	13.1%	5,280	16.2%	10,167	12.8%	117	9.7%
Tasman	77	0.0%	5	0.0%	662	0.8%	13	1.1%
Nelson	1,781	0.7%	268	0.8%	1,240	1.6%	24	2.0%
Marlborough	320	0.1%	36	0.1%	1,335	1.7%	11	0.9%
West Coast	238	0.1%	71	0.2%	661	0.8%	10	0.8%
Canterbury	25,652	10.0%	4,365	13.4%	11,907	14.9%	95	7.9%
Otago	19,276	7.5%	4,099	12.5%	4,702	5.9%	81	6.7%
Southland	2,128	0.8%	330	1.0%	2,446	3.1%	31	2.6%
Extramural	48,358	18.9%	1,578	4.8%	-	-	-	-
Unknown	1,895	0.7%	31	0.1%	17	0.0%	-	0.0%
Total	266,805⁵	n/a	33,301	n/a	79,705		1,201	

⁵ The regional all-learners total of 266,805 and fees-free learners total of 33,301 in Table Six do not match the respective totals of 255,657 and 32,681 in Table One as delivery can be reported in multiple regions.