



Overview of delivery in the ITP sector

This document provides an overview of tertiary education delivery in the institutes of technology and polytechnics (ITP) sector and highlights key changes since 2008.

Delivery in the ITP sector has declined over the past seven years

Equivalent full-time student (EFTS)¹ numbers in the ITP sector rose sharply from 2008 to 2010.² This followed the global financial crisis and the accompanying increase in unemployment, which led to an increase in people wanting to study. Since 2010, EFTS delivered in the ITP sector have continued to trend downwards.

After a large fall in 2013, EFTS were relatively flat over the next three years (Figure 1). However in 2017, EFTS declined by 7 percent. From the peak in 2010, total EFTS in the ITP sector have fallen by 11 percent.

Figure 1: Total EFTS in the ITP sector

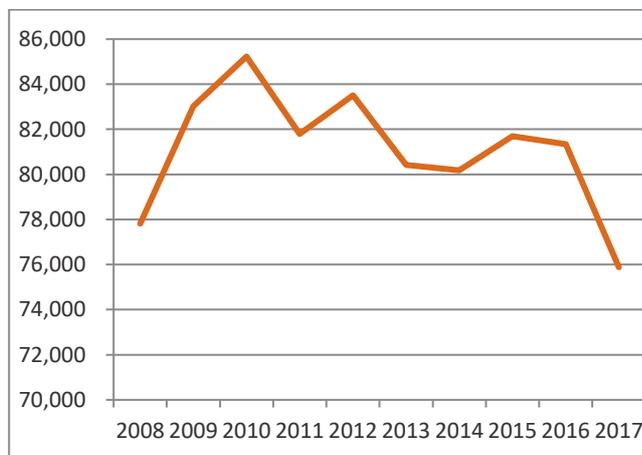
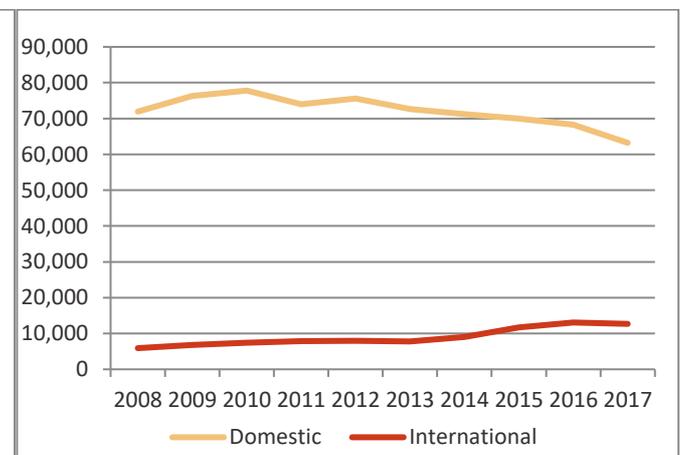


Figure 2: Domestic and international ITP EFTS



Most of the decline is due to a fall in domestic EFTS

The decline in overall EFTS in the ITP sector was driven by a fall in domestic EFTS (Figure 2). Domestic EFTS have declined by 19 percent (or 14,500 EFTS) since 2010. International EFTS have risen by 70 percent (or 5,000 EFTS) over the same period, which has partially offset the decline.

¹ One EFTS equates to the student workload that would normally be carried out in one year by a student enrolled full time.

² Data used in this infosheet is for all funding sources.

The decline in domestic EFTS in the ITP sector has been greatest for learners who are under 20 or over 40 years old. Reasons for the decline include:

- fewer school leavers, due to changing demographics
- an improving labour market, which tends to make full-time study less attractive for working-age people (who make up the majority of ITP learners)
- young people remaining in secondary school for longer and engaging in the increasing number of secondary-tertiary partnership programmes offered, such as Trades Academies
- government policy changes, such as removing access to student loans and allowances for those aged 55 and over
- the end of some funds, and the introduction of competitive foundation education funding (see explanation below)
- increased competition for learners from other providers.

Decline in EFTS in the ITP sector particularly strong at levels 1 to 3

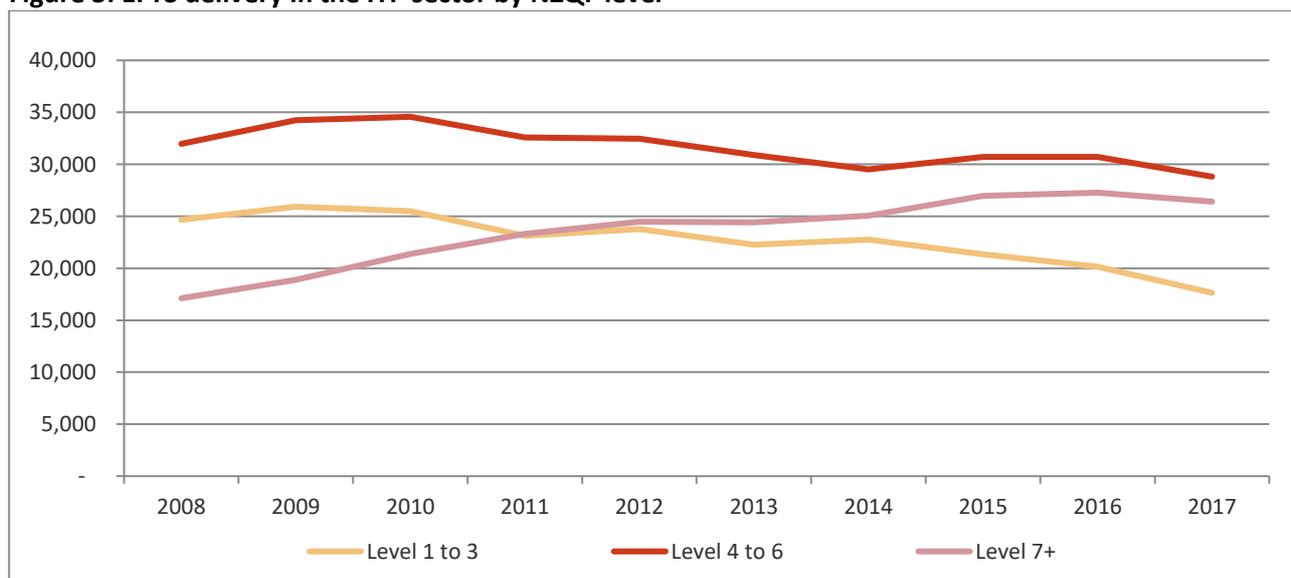
Most ITPs deliver across the New Zealand Qualifications Framework (NZQF), from foundation through to degree level and higher.

Delivery at levels 1 to 3 has declined sharply (down 31 percent) in the ITP sector since 2010 (Figure 3). Over the same period, the number of EFTS delivered at level 7 and above has risen by 24 percent, while delivery at levels 4 to 6 has declined by 17 percent.

The fall in ITP delivery at levels 1 to 3 has almost entirely been at level 2, with a smaller drop at level 1. Delivery at level 2 fell from around 10,000 EFTS in 2010 to around 4,000 EFTS in 2017 – a 59 percent reduction. Some of this reflects students remaining in school for longer and then leaving with higher NCEA attainment rates.

Another contributor to the decline was the introduction in 2012 of competitive funding for levels 1 and 2 foundation education. This resulted in a significant shift of foundation education funding from ITPs to Private Training Establishments (PTEs) and Wānanga.

Figure 3: EFTS delivery in the ITP sector by NZQF level



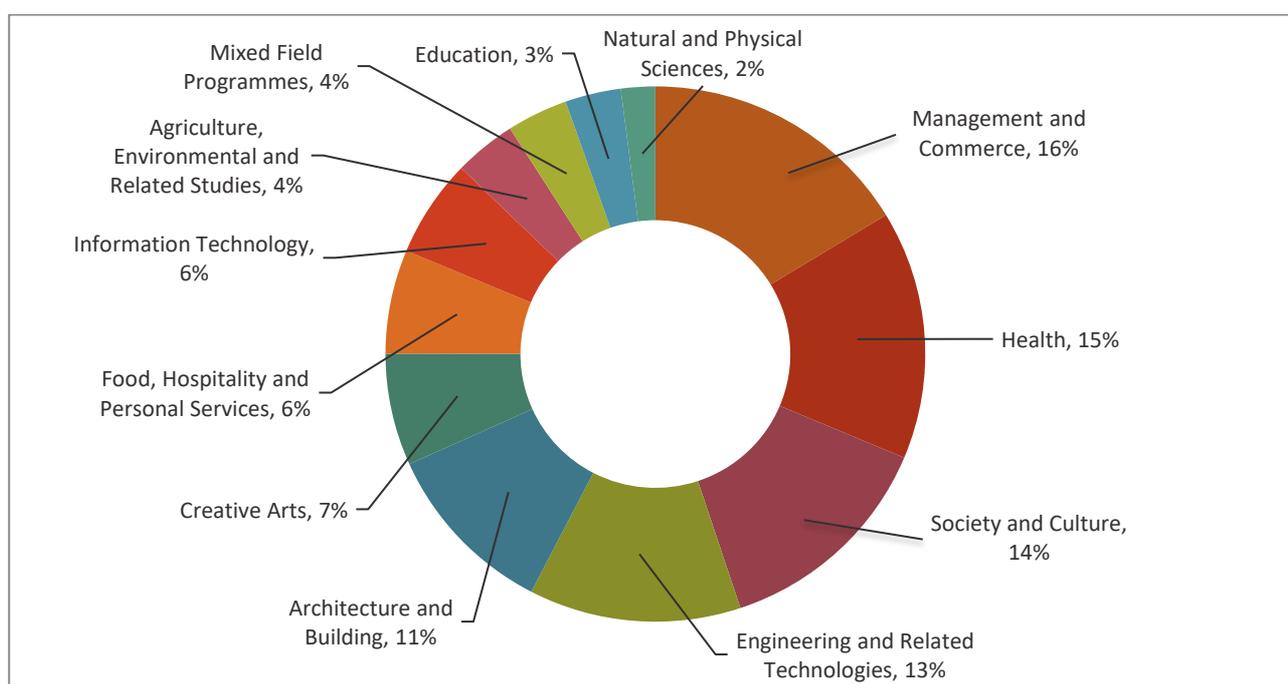
Mix of delivery by level has changed significantly over past seven years

In 2010, 31 percent of overall ITP delivery was at levels 1 to 3 and 26 percent of delivery was at levels 7 and above. By 2017, only 24 percent of overall delivery was at levels 1 to 3 while the proportion of delivery at level 7 and above had risen to 36 percent. Delivery at levels 4 to 6 has been relatively stable over the same period (around 40 percent).

ITPs deliver across a wide range of subject areas

ITPs deliver across many subject areas (Figure 4). While vocational trades training retain a key role in many ITPs' programme portfolios, the three biggest subject areas are now management and commerce (16 percent of all ITP delivery in 2017), health (15 percent) and society and culture (14 percent). Around half of the delivery in these three subject areas is at level 7 or above.

Figure 4: EFTS delivery in the ITP sector in 2017 by NZSCED broad field of study



The strongest growth areas over the past seven years have been in architecture and building (up 28 percent or 1,800 EFTS), information technology (up 11 percent or 500 EFTS) and health (up 10 percent or 1,100 EFTS). The biggest declines have been in agriculture, environmental and related studies (down 45 percent or 2,400 EFTS), creative arts (down 34 percent or 2,700 EFTS), and natural and physical sciences (down 29 percent or 600 EFTS).

ITPs have increased delivery to international learners

Many ITPs have had strong growth in international learners, with 70 percent more international EFTS in the ITP sector in 2017 compared with 2010.

More than half of international learners (55 percent in 2017) undertake study at level 7 and above. Most of the international growth since 2010 has come from those studying at levels 7 and above (up 128 percent). Delivery at levels 4 to 6 has also grown (up 31 percent). The biggest field of study for international learners is management and commerce (36 percent), followed by information technology (14 percent). India has been the biggest source country for international learners in the ITP sector in recent years, accounting for 40 percent of all international learners in 2017. This is followed by China at 34 percent.

Nearly all ITPs have experienced a fall in domestic EFTS

Table 1 shows domestic funded EFTS in 2010, 2016 and 2017. It also shows the changes over the past year and comparisons with seven years ago. Since 2010, changes have ranged from a 35 percent decline in domestic EFTS at Western Institute of Technology at Taranaki (WITT) to 10 percent growth at Otago Polytechnic. In 2017 however, almost all ITPs experienced a fall in domestic EFTS.

Table 1: Domestic funded EFTS delivered

	2010	2016	2017	2010-17 % change	2016-2017 % change
Ara Institute of Canterbury	N/A ³	6,615	6,183	-	-7%
Eastern Institute of Technology	N/A ⁴	4,179	3,998	-	-4%
Manukau Institute of Technology	6,754	6,219	5,501	-19%	-12%
Nelson Marlborough Institute of Technology	2,953	2,271	2,248	-24%	-1%
NorthTec	3,223	3,270	3,004	-7%	-8%
Open Polytechnic of New Zealand	6,730	5,817	5,627	-16%	-3%
Otago Polytechnic	3,510	4,006	3,873	10%	-3%
Southern Institute of Technology	4,481	4,228	4,019	-10%	-5%
Tai Poutini Polytechnic	2,280	1,891	1,894	-17%	0%
Toi Ohomai Institute of Technology	N/A ⁵	6,075	5,265	-	-13%
Universal College of Learning	3,755	3,066	3,039	-19%	-1%
Unitec New Zealand	8,955	6,986	6,407	-28%	-8%
Wellington Institute of Technology	4,049	3,429	3,131	-23%	-9%
Whitireia New Zealand	3,135	2,720	2,381	-24%	-12%
Waikato Institute of Technology	6,247	5,948	5,415	-13%	-9%
Western Institute of Technology Taranaki	1,893	1,551	1,228	-35%	-21%
Total	77,795	68,271	63,213	-19%	-7%

³ In 2016, the Christchurch Polytechnic Institute of Technology and Aoraki Polytechnic merged and became the Ara Institute of Canterbury. As a result, information is not available for 2010.

⁴ In 2011, Eastern Institute of Technology merged with Tairāwhiti Polytechnic. As a result, information is not available for 2010.

⁵ In 2016, the Waiariki Institute of Technology and Bay of Plenty Polytechnic merged and became Toi Ohomai Institute of Technology. As a result, information is not available for 2010.

Growth in international EFTS has varied significantly across ITPs since 2010

Table 2 shows international EFTS delivery in 2010, 2016 and 2017. It also shows the changes over the past year and comparisons with seven years ago. Since 2010, all but Whitireia have seen an increase in international EFTS. Some ITPs, such as NorthTec and Otago Polytechnic, have seen international EFTS increase six- or seven-fold over this period. In 2017, international EFTS fell across eleven institutions, with five others showing growth.

Table 2: International EFTS delivered

	2010	2016	2017	2010-17 % change	2016-2017% change
Ara Institute of Canterbury	N/A ²	1,024	879	-	-14%
Eastern Institute of Technology	N/A ³	418	519	-	24%
Manukau Institute of Technology	533	1,059	1,032	94%	-3%
Nelson Marlborough Institute of Technology	760	1,000	858	13%	-14%
NorthTec	87	672	740	753%	10%
Open Polytechnic of New Zealand	21	47	35	72%	-25%
Otago Polytechnic	170	795	1,253	635%	58%
Southern Institute of Technology	362	1,085	933	157%	-14%
Tai Poutini Polytechnic	24	80	60	147%	-24%
Toi Ohomai Institute of Technology	N/A ⁴	1,288	1,016	-	-21%
Universal College of Learning	197	267	219	11%	-18%
Unitec New Zealand	1,543	2,114	2,035	32%	-4%
Wellington Institute of Technology	301	766	834	177%	9%
Whitireia New Zealand	1,316	1,264	1,058	-20%	-16%
Waikato Institute of Technology	555	1,014	1,064	92%	5%
Western Institute of Technology Taranaki	84	175	135	61%	-23%
Total	7,432	13,068	12,670	70%	-3%

Further information

Further statistics on ITPs and the overall tertiary education sector can be found on the [Education Counts](#) website.

Information on funding allocations for ITPs and all other tertiary education organisations (TEOs) the TEC funds can be found on [our website](#).

TEOs can access further information through the information products in the Ngā Kete Portal.



We ensure New Zealand's future success.