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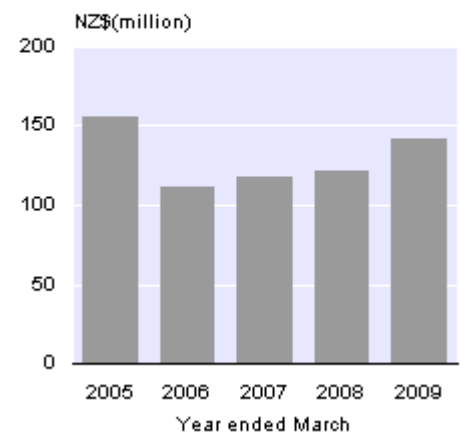
Survey of English Language Providers: Year ended March 2009

Highlights

For the year ended March 2009:

- English language schools received \$142 million in tuition and related fees from international students, up \$21 million from the previous March year.
- As in the previous year, Saudi Arabian students accounted for the biggest increase in expenditure on tuition and related fees – they spent \$13 million more than in the March 2008 year.
- The number of international students enrolled at English language schools dropped 6.8 percent.
- The total number of student weeks completed at English language schools was up 14.2 percent.

Total Tuition and Related Fees
All countries
2005–09



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Commentary

Overview

This release provides detail on spending by international students in New Zealand. This spending forms part of the exports of travel services component in the Balance of Payments and the expenditure measure of Gross Domestic Product.

Travel exports (spending by visitors to New Zealand) were valued at \$6,954 million for the year ended March 2009 and accounted for 12.3 percent of total exports of goods and services. Estimated spending by international students contributed \$1,335 million, or 19.2 percent of travel exports. Spending by international students is made up of expenditure by international students studying at primary and secondary schools and for formal tertiary qualifications, as well as students studying at English language schools.

Total expenditure by international students

The estimated total value of expenditure by all international students studying in New Zealand was \$1,335 million for the year ended March 2009. This compares with the revised value of \$1,464 million for the year ended March 2008. These figures will be further revised and published in the *Balance of Payments and International Investment Position: June 2009 quarter* on 22 September 2009. According to the English Language Providers (ELP) survey, total expenditure by students studying at English language schools increased \$41 million in the March 2009 year. This publication focuses on the data gathered from the ELP survey.

Results from the English Language Providers survey

During the March 2009 year, 36,990 international students were enrolled in English language schools in New Zealand. These schools earned \$142 million in tuition and related fees during the year. The number of students dropped 6.8 percent in the year ended March 2009 compared with the year ended March 2008. This followed an increase of 5.1 percent between the March 2007 and March 2008 years. Despite the fall in student numbers, income earned from tuition and related fees increased \$20.7 million (17.1 percent) in the March 2009 year compared with the March 2008 year.

Spending on English language tuition by Saudi Arabian students has increased every year since March 2003, from \$0.6 million for the year ended March 2003 to \$23 million for the year ended March 2009.

On average, students enrolled in longer courses in the March 2009 year than in the previous year. An increase in the average length of study was the main contributor to the increase in tuition revenue reported and it more than offset the decrease in student numbers.

Expenditure by international students at English language schools

Total expenditure by international students studying at English language schools includes expenditure on tuition and accommodation sourced from the ELP survey. The calculation of total expenditure also includes an estimate for other expenditure (such as living costs) derived from figures supplied by English language tuition providers. The total estimate for expenditure by international students studying at English language schools was \$284 million in the March 2009 year, an increase of \$41 million from the March 2008 year. Revenue from tuition and related fees increased 17.1 percent in the March 2009 year, while revenue from accommodation provision increased 22.7 percent.

Revenue from English language tuition

Despite a fall in student numbers, revenue from English language tuition increased from \$121 million for the March 2008 year to \$142 million for the March 2009 year. Revenue from tuition and related fees has increased since the March 2006 year, but remains 44.9 percent lower than the peak of \$258 million in the March 2003 year. The increase in expenditure on tuition and related fees between the March 2008 and March 2009 years was mainly due to a \$13 million (137.2 percent) increase in expenditure by Saudi Arabian students.

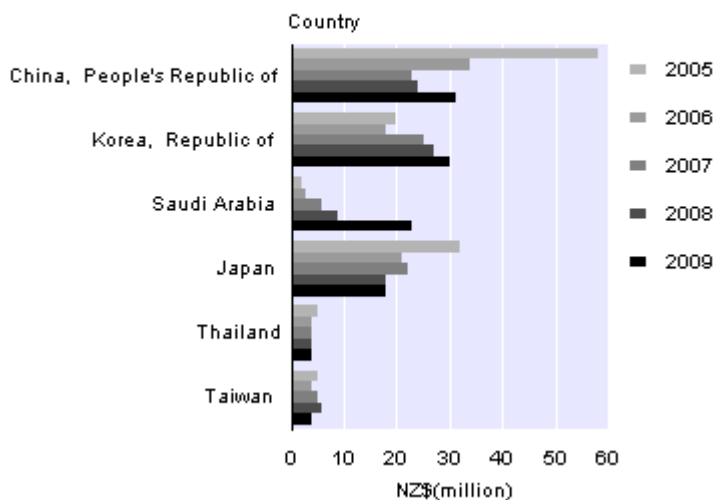
Saudi Arabia surpassed Japan as the third largest contributor to English language tuition expenditure in March 2009. Both the number of students from Saudi Arabia and their average length of study increased from the March 2008 year. In the March 2009 year, average expenditure per week for Saudi Arabian students was \$399, compared with \$296 for students from South Korea and \$293 for students from the People's Republic of China.

Students from China made the other significant contribution to the increase in tuition revenue; their expenditure increased \$7.5 million (31.8 percent). Tuition and related fees received from Chinese students (\$31.1 million) surpassed that of students from South Korea (\$29.5 million) and is now the highest for all countries in the March 2009 year. The increase in total tuition revenue in the March 2009 year was partly offset by a \$2.1 million (35.9 percent) decrease in revenue received from Taiwanese students.

Student Tuition Expenditure

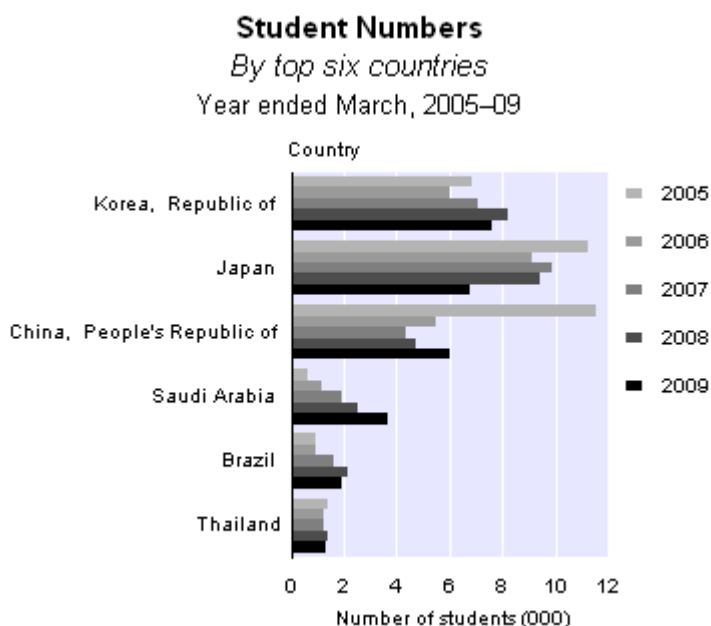
By top six countries

Year ended March, 2005–09



Student numbers

The number of international students enrolled in English language courses in New Zealand during the March 2009 year was 36,990, down 6.8 percent from the previous March year. This follows an increase of 5.1 percent in the March 2008 year. A fall of 2,633 (28.1 percent) in the number of Japanese students enrolled in English language courses during March 2009 was the major contributor to the fall in total student numbers. There were also 620 fewer South Korean students in March 2009 year compared with March 2008 year. These falls were consistent with the drop in total short-term visitor numbers from Japan and South Korea during the year. These falls were partly offset by increases in the number of Chinese (up 27.7 percent) and Saudi Arabian students (up 43 percent).



Student weeks

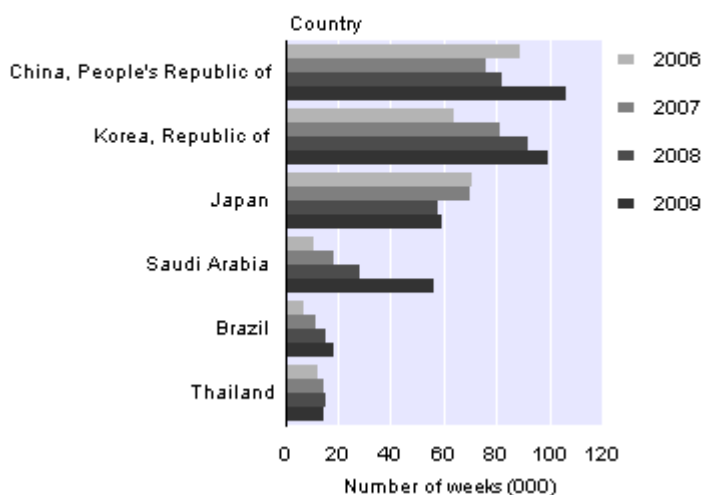
Total weeks studied by all students increased 14.2 percent from the March 2008 year to the March 2009 year. This increase drove the overall increase in tuition and related fees during the March 2009 year. The largest increases in the number of weeks studied were recorded for students from Saudi Arabia (up 28,018 or 98.3 percent) and China (up 24,165 or 29.4 percent). The largest decrease in weeks studied was for students from Taiwan and was partly due to a fall in student numbers from that country.

The average length of study for English language courses in the March 2009 year was 12 weeks. This compares with an average length of 10 weeks in March 2008. On average, Chinese students studied for the longest period of time (17.7 weeks) and Japanese students studied for the shortest period of time (8.8 weeks). The average length of study for Saudi Arabian students was 15.4 weeks during the year ended March 2009.

Total Student Weeks by Country

By top six countries

Year ended March, 2006–09



English language provider accommodation provision

Accommodation revenue collected in the ELP survey only includes revenue for accommodation provided or arranged by English language schools. For the year ended March 2009, English language provider accommodation revenue was \$41 million, an increase of \$8 million (22.7 percent) from the previous year. The largest increase in accommodation expenditure was by students from South Korea, up \$2.6 million (62.2 percent). Students from China and Saudi Arabia also increased their spending on accommodation by \$2.5 million (46.5 percent) and \$1.6 million (53.5 percent) respectively, during March 2009.

Data sources

Two main data sources are used to estimate spending by international students in New Zealand:

- The survey of English Language Providers (ELP) is an annual survey that collects information from English language schools on expenditure by non-resident students studying in New Zealand.
- Estimated spending by international students studying at primary and secondary schools, and in formal tertiary courses, is calculated using enrolment numbers from the Ministry of Education. Data on student enrolments at these institutions is provided using Full-time Equivalent (FTE) student numbers for the year ended 31 December 2008. This data is used as an approximation for the year ended March 2009 figures, as it is the most recent data available.

The estimated total value of expenditure by all international students studying in New Zealand reported in this publication will be revised and published in the June 2009 quarter release of the Balance of Payments and International Investment Position statistics (22 September 2009).

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Next release...

Survey of English Language Providers: Year ended March 2009 will be released in August 2010.

Technical notes

Purpose of the survey

The objective of the Survey of English Language Providers (ELP) is to measure the revenue earned by New Zealand English Language schools for education services provided to non-resident students studying in New Zealand. The data collected from this survey is then used in the calculation of total education exports in the travel component of the Balance of Payments statistics.

Information collected

The ELP survey collects data on total revenue received from tuition and other types of fees for education services provided to non-resident students studying at English language schools. Other types of fees include activity fees, enrolment fees, book fees, and administration and processing fees. The survey also collects data on the total revenue received from non-resident students for any boarding, accommodation or homestay placement fees, where accommodation is arranged by the school. Data is requested by the country of residence of students. Also collected is the number of students from each country, and the number of weeks students studied.

Population

All known New Zealand private, polytechnic and university English language schools with non-resident students are surveyed. Respondents are identified from the Statistics New Zealand Business Frame, the English Language Schools Register (provided by the Ministry of Education), and media search activity. Primary and secondary schools are not included in the ELP survey. Where institutions offer other courses, for example formal tertiary qualifications, international students enrolled in these courses are recorded separately.

Methodology

Imputations are calculated to allow for English language providers who were surveyed but did not respond. Non-response imputations are based on the data received from that respondent the year before, rated forward by a measure of the change in the data of schools that did respond. If the respondent was not in the survey previously, or did not respond in the previous year, non-response is imputed from the average of similar-sized respondents. An estimate is also made for spending by international students on accommodation not provided by English language schools and for other spending by English language students.

Limitations

The ELP survey collects data on expenditure by international students on tuition and accommodation arranged by English language schools. No other expenditure data is collected. Expenditure estimates for international students studying in New Zealand at primary and secondary schools, and those studying for formal tertiary qualifications are based on data on average course fees.

Country data from the ELP survey should be used with caution. Respondents may not always be able to accurately identify the number of students by country of origin. Further, some respondents were able to report the number of students by country and total tuition revenue, but not tuition revenue on a by-country basis. In such cases, the same average expenditure per student was applied to all students, regardless of country of origin.

The ELP survey is designed to collect data on the number of students and expenditure for the period between 1 April and 31 March. However, it is not always possible for English language schools to report on a year ended March basis. In such cases, the respondents are asked to provide the requested information for an alternative recent year ended, such as the year ended December.

In the ELP survey, respondents are asked to provide an estimate for revenue from accommodation arranged by the school. Statistics NZ does not explicitly collect information on the accommodation expenditure of international students that do not have their accommodation arranged by the English language school. However, the estimate for other expenditure by ELP students includes all spending, other than tuition and related fees, by international students studying on English language courses in New Zealand. Therefore, all accommodation expenditure, whether arranged by an English language school or not, will be implicitly included in the 'other expenditure' estimate.

Student numbers

Student numbers collected in the ELP survey are the number of students studying during the period April 2008 to the end of March 2009. This number of students does not reflect full-time equivalent student numbers, therefore differences in tuition and accommodation expenditure per student can be a result of the differences in the length of courses.

Student weeks

Since the year ended March 2006 ELP survey, respondents were asked to provide the number of student weeks by country. This data provides information on the lengths of courses being undertaken by international students at English language schools. Together with student numbers figures, this additional data will help explain movements in tuition revenue. Some schools are unable to provide accurate information on the number of student weeks studied by country, in these instances the average number of student weeks, as reported by all other respondents, is assigned to the relevant countries. Where schools provide data in full-time equivalent student (EFTS) numbers, these figures are reported as student weeks by using the ratio of one EFTS equals 40 student weeks.

Response rates

The ELP survey has been run as a census since 2003. One hundred and sixty-three schools provided data for the year ended March 2009, and a response rate of 99 percent was achieved for the survey. Schools that closed down during the survey period may have had students earlier in the year that may not have been included in the results.

Number of schools in survey

In the March 2009 year, there were 163 schools in the survey population for the ELP questionnaire. The number of schools returning data was 161 in the March 2009 year, with 34 schools responding as having no revenue or students for the period. These 'nil responses' are a mixture of schools that have closed down, newly established schools which were planning to begin operations during the March 2010 year, and schools that have had no activity during the March 2009 year but are expecting data for the following year.

Responses to the ELP Survey					
	2005	2006	2007	2008	2009
Schools in survey	189	193	179	177	163
Number responding with non-zero data	139	125	122	121	127
Total responding	173	162	161	158	161
Response rate (%)	92	84	90	89	99

Revisions to previously published data

Revisions were made to the estimated expenditure of international students studying in New Zealand, due to new or improved data.

Sampling errors

As the ELP survey is run as a census, sampling errors are not calculated.

Non-sampling errors

Non-sampling errors in the survey data may result from errors in the survey frame, respondent error, mistakes made during processing survey results and non-response imputation. There may be some English language schools that are not registered or are for some other reason not included in this survey population. Statistics NZ adopts procedures to detect and minimise these types of errors but they may still occur and they are not quantifiable.

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Tables

The following tables are printed with this Hot Off The Press and can also be downloaded from the Statistics New Zealand website in Excel format. If you do not have access to Excel, you may use the [Excel file viewer](#) to view, print and export the contents of the file.

1. Tuition and related fees
2. Student numbers
3. Accommodation provision
4. Student weeks

Survey of English Language Providers: Year ended March 2009

Table 1

Tuition and Related Fees⁽¹⁾⁽²⁾⁽³⁾
Year ended March

	2005	2006	2007	2008	2009	Percentage change
	NZ\$(000)					
China, People's Republic of	58,469	34,388	23,252	23,632	31,140	31.8
Korea, Republic of	20,267	18,058	24,964	26,642	29,516	10.8
Saudi Arabia	1,869	3,019	5,636	9,511	22,559	137.2
Japan	32,205	20,599	22,328	18,448	18,371	-0.4
Thailand	4,589	3,867	4,162	4,523	4,314	-4.6
Taiwan	4,889	4,542	4,981	5,988	3,840	-35.9
Brazil	1,917	1,908	2,894	3,603	3,691	2.4
Switzerland	5,550	3,624	3,679	3,487	3,289	-5.7
Viet Nam	1,920	1,464	1,065	940	3,106	230.5
Russia	1,821	1,426	1,729	1,554	2,890	86.0
Germany	2,518	2,193	1,837	1,754	1,751	-0.1
French Polynesia	520	1,251	759	828	1,237	49.3
Colombia	316	222	438	619	1,216	96.5
France	904	473	651	842	1,082	28.5
Philippines	137	184	862	.. C	.. C	.. C
Chile	393	611	956	1,191	807	-32.2
India	.. C	1,003	755	1,318	797	-39.5
Hong Kong (SAR)	1,173	803	858	718	768	7.0
Spain	289	146	266	468	669	43.1
Oman	809	397	395	225	570	153.3
Indonesia	680	497	570	428	442	3.4
New Caledonia	388	430	417	406	389	-4.2
Czech Republic	323	364	412	.. C	.. C	.. C
Cambodia	380	370	440	452	342	-24.2
Argentina	.. C	256	212	320	342	6.6
Malaysia	262	274	292	160	333	108.0
Country unspecified ⁽⁴⁾	7,964	6,314	9,224	7,232	3,249	-55.1
Other countries ⁽⁵⁾	4,582 R	3,006 R	3,313 R	5,780 R	5,100	-16.8
Total	155,134	111,689	117,347 R	121,068	141,812	17.1

(1) Calculated using results from the Survey of English Language Providers.

(2) Data may not sum to stated totals due to rounding.

(3) Tuition and related fees include activity fees, enrolment fees, book fees, and administration or processing fees.

(4) Country unspecified includes those answers where country of student was not specified and those answers that were imputed for non-responding schools.

(5) Other countries includes those countries with confidential data and those not shown on the table.

Symbols:

C confidential

R revised

.. data not available

Survey of English Language Providers: Year ended March 2009

Table 2

Student Numbers⁽¹⁾⁽²⁾
Year ended March

	2005	2006	2007	2008	2009	Percentage change
Korea, Republic of	6,873	6,024	7,051	8,192	7,572	-7.6
Japan	11,250	9,144	9,835	9,385	6,752	-28.1
China, People's Republic of	11,512	5,499	4,383	4,696	5,998	27.7
Saudi Arabia	629	1,191	1,899	2,564	3,667	43.0
Brazil	911	968	1,648	2,180	1,951	-10.5
Thailand	1,429	1,279	1,272	1,404	1,288	-8.3
Switzerland	1,763	1,338	1,281	1,244	1,148	-7.7
Taiwan	1,439	1,551	1,749	1,639	1,106	-32.5
Germany	1,175	1,240	1,093	902	1,052	16.6
French Polynesia	246	585	452	351	624	77.8
Russia	447	280	400	446	614	37.7
France	435	239	291	389	502	29.1
Viet Nam	336	240	196	193	381	97.4
Chile	167	261	402	385	310	-19.5
Spain	105	83	144	288	298	3.5
Hong Kong (SAR)	372	282	288	236	284	20.3
New Caledonia	171	216	207	193	237	22.8
Philippines	33	67	237	.. C	217	.. C
Colombia	109	74	106	.. C	194	.. C
Argentina	93	170	136	155	188	21.3
Czech Republic	129	153	207	154	187	21.4
Malaysia	51	65	94 R	55	177	221.8
India	167	185	141	293	161	-45.1
Indonesia	193	128	160	113	136	20.4
Italy	113	108	124	170	120	-29.4
Oman	114	84	94	96	119	24.0
Country unspecified ⁽³⁾	2,163	3,265	2,848	1,867	586	-68.6
Other countries ⁽⁴⁾	992 R	831 R	990 R	2,078	1,121	-37.4
Total	43,417	35,550	37,728 R	39,668	36,990	-6.8

(1) Calculated using results from the Survey of English Language Providers.

(2) Data may not sum to stated totals due to rounding.

(3) Country unspecified includes those answers where country of student was not specified and those answers that were imputed for non-responding schools.

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Survey of English Language Providers: Year ended March 2009

Table 3

Accommodation Provision⁽¹⁾⁽²⁾⁽³⁾
Year ended March

	2005	2006	2007	2008	2009	Percentage change
	NZ\$(000)					
China, People's Republic of	11,028	6,167	4,665	5,401	7,911	46.5
Korea, Republic of	2,875	2,766	3,857	4,237	6,874	62.2
Japan	8,947	5,973	6,654	6,162	6,303	2.3
Saudi Arabia	703	1,033	2,369	3,009	4,618	53.5
Switzerland	2,642	1,598	1,796	1,981	2,024	2.2
Brazil	907	611	1,408	1,881	1,704	-9.4
Taiwan	1,924	1,351	1,598	1,766	1,578	-10.6
Thailand	1,172	973	990	1,478	1,443	-2.4
Viet Nam	489	242	189	231	1,275	451.9
Russia	627	380	439	438	1,004	129.3
Germany	1,288	995	594	842	783	-7.0
Hong Kong (SAR)	324	278	278	265	650	145.5
France	297	145	274	391	498	27.3
French Polynesia	255	442	308	323	463	43.4
Chile	114	152	392	259	347	34.0
Spain	134	58	125	185	303	63.6
Colombia	.. C	.. C	.. C	190	278	46.4
Czech Republic	152	109	176	135	217	61.0
Oman	.. C	.. C	.. C	62	202	225.3
New Caledonia	142	144	220	197	179	-9.3
Country unspecified ⁽⁴⁾	2,925	3,889	3,848	1,677	573	-65.9
Other countries ⁽⁵⁾	2,154 R	1,181 R	1,727 R	2,011 R	1,420	-29.4
Total	39,099	28,487	31,907	33,121	40,647	22.7

(1) Calculated using results from the Survey of English Language Providers.

(2) Data may not sum to stated totals due to rounding.

(3) Accommodation provision includes fees received by English language schools for accommodation provided or arranged by that school.

(4) Country unspecified includes those answers where country of student was not specified and those answers that were imputed for non-responding schools.

(5) Other countries includes those countries with confidential data and those not shown on the table.

Symbols:

C confidential

R revised

.. data not available

Survey of English Language Providers: Year ended March 2009

Table 4

Total Student Weeks⁽¹⁾⁽²⁾
Year ended March

	2006	2007	2008	2009	Percentage change
China, People's Republic of	88,782	76,237	82,121	106,286	29.4
Korea, Republic of	64,007	81,529	91,869	99,723	8.5
Japan	70,685	69,796	57,601	59,501	3.3
Saudi Arabia	10,938	18,588	28,506	56,524	98.3
Brazil	6,894	11,355	15,191	18,654	22.8
Thailand	12,773	15,075	15,240	14,669	-3.7
Taiwan	14,355	16,890	18,480	12,724	-31.1
Switzerland	10,917	10,699	10,583	9,868	-6.8
Russia	4,707	5,463	4,534	9,180	102.5
Viet Nam	4,659	3,485	3,049	7,991	162.1
Germany	5,696	6,966	5,929	6,124	3.3
France	1,591	2,016	2,854	3,941	38.1
Colombia	914	1,582	1,740	3,681	111.5
French Polynesia	3,381	2,177	2,128	3,623	70.2
Chile	2,238	3,086	3,850	3,184	-17.3
Hong Kong (SAR)	2,459	2,828	2,148	2,787	29.8
India	2,498	2,320	5,875	2,615	-55.5
Philippines	754	.. C	.. C	.. C	.. C
Spain	483	791	1,684	2,148	27.6
Malaysia	805	1,095	563	1,865	231.3
Oman	1,292	1,200	797	1,696	112.8
Indonesia	1,750	1,703	1,383	1,526	10.3
Cambodia	1,767	1,951	2,177	1,377	-36.7
Czech Republic	1,568	1,274	1,252	1,352	8.0
Sweden	290	.. C	.. C	.. C	.. C
Argentina	1,043	679	1,198	1,128	-5.9
Qatar	--	--	394	1,064	170.1
Turkey	313	620	757	1,014	33.9
New Caledonia	1,291	1,342	944	982	4.1
Country unspecified ⁽³⁾	31,329	32,403	21,043	9,649	-54.1
Other countries ⁽⁴⁾	7,769 R	11,917 R	16,802 R	12,773	-35.4
Total	357,948	385,067	400,691	457,647	14.2

(1) As calculated using results from the Survey of English Language Providers.

(2) Data may not sum to stated totals due to rounding.

(3) Country unspecified includes those answers where country of student was not specified and those answers that were imputed for non-responding schools.

(4) Other countries includes those countries with confidential data and those not shown on the table.

Symbols:

C confidential

R revised

.. data not available

-- amount too small to be expressed