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TR18-9259

Education New Zealand Briefing

18 JUL 2018

BY: Office of Hon Hipkins

Title:	June 2018 student visa summary		
Date:	18 July 2018	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1819-014

Action sought

Addressee:	Action sought:	Deadline:
Minister of Education	<p>Note that Education New Zealand will release the June 2018 student visa numbers on 20 July 2018.</p> <p>Forward this briefing to the Minister of Immigration for his information.</p> <p>Agree that this briefing is proactively released as part of the August 2018 release.</p>	

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact
John Goulter	General Manager, Stakeholders and Communications	[Redacted]	[Redacted]	Withheld under s9(2)(a)
Andy McPhee	Intelligence Manager	[Redacted]		x

The following departments/agencies have seen this report

<input type="checkbox"/> ERO	<input checked="" type="checkbox"/> MBIE	<input type="checkbox"/> MFaT	<input type="checkbox"/> MoE	<input type="checkbox"/> MoH	<input type="checkbox"/> MSD
<input type="checkbox"/> NZQA	<input type="checkbox"/> NZTE	<input type="checkbox"/> TEC	<input type="checkbox"/> TPK	<input type="checkbox"/> Treasury	<input type="checkbox"/>

Minister's office to complete

<input type="checkbox"/> Approved	<input type="checkbox"/> Declined	<input type="checkbox"/> Noted	<input type="checkbox"/> Needs change
<input type="checkbox"/> Seen	<input type="checkbox"/> Overtaken by events	<input type="checkbox"/> See Minister's notes	<input type="checkbox"/> Withdrawn

Comments:

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Recommendations

Education New Zealand recommends that you

- a. **note** that Education New Zealand will release the June 2018 student visa numbers on 25 July 2018

Noted

- b. **forward** this briefing to the Minister of Immigration for his information

- c. **agree** that this briefing is proactively released as part of the August 2018 release

Agree / Disagree



John Goulter
General Manager, Stakeholders and
Communications
Education New Zealand



Hon Chris Hipkins
Minister of Education

24/7/18

Proactively released

Purpose

1. This paper summarises the June 2018 student visa numbers that Education New Zealand (ENZ) will publish in [IntelliLab](#), ENZ's intelligence portal for the international education sector and government agencies, on 25 July 2018.

Background

2. International student enrolments and student visa numbers are used to assess trends in the international education sector. International student enrolments and student visa numbers are also important for sector planning and for government policy makers. ENZ reports student visa and international student enrolment numbers to industry and government.
3. Non-New Zealand residents wishing to study here generally require a visa to enter New Zealand. However, people from visa waiver countries who enter New Zealand on a visitor visa are able to study on courses of three months duration or less without requiring a student visa.
4. Student visa data, which is made available to ENZ on a monthly basis by Immigration New Zealand, provides a more timely indicator of sector trends than international student enrolment data, which is collected three times a year by the Ministry of Education. It should be noted however that student visa trends do not always provide an accurate means of estimating current (or future) international student enrolments.
5. ENZ focuses on first-time student visas to indicate the number of new international students being attracted to New Zealand and valid student visas as a lead indicator for international student enrolment numbers.
6. For sectors that typically attract multiyear enrolments (e.g. an international student undertaking a three-year Bachelors degree at a university), a decline in first-time student visas is often the first leading indicator of an impending future decline in total enrolments.

June 2018 student visa summary

7. For the June 2018 year to date, first-time student visas are down 4% compared to the same period in 2017. More first-time student visas have been approved for Indian students than for Chinese students. There has been a 5% increase in Indian first-time student visas in contrast to the 21% decrease in Chinese first-time student visas.
8. At 1 July 2018¹, there were 1% fewer valid student visas compared to July 2017. This was due to a 14% decrease in valid student visas for the private training establishment (PTE) sector and a 4% decrease for the institutes of technology and polytechnics sector. The decrease in the PTE sector was caused by decreases in the number of valid student visas for Indian and Chinese students. The decline in Chinese PTE students was centred on foundation studies courses and continues the trend that began in May 2017 for the China market. However, the decline in valid student visas for Indian PTE students is a more recent development that was hidden by a spike in first-time Indian PTE students at the start of 2018.

¹ Valid student visas are a count of the number of student visas that valid (i.e. a student visa that has been issued to an international student and has not expired) on a particular day.

Next steps

9. On 25 July 2018, ENZ will release the June 2018 Visa Summary (Appendix One) in its online intelligence portal, [IntelliLab](#).

Proactive release

10. ENZ intends to proactively release this briefing 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.

Proactively released

Appendix One: June 2018 Visa Summary

Visa Summary: June 2018



OVERVIEW

TOP-LINE TRENDS HOLD



There have been no changes in top-line visa trends.

VSV

YTD 2018 Valid Student Visas (VSV): 75,945. Stable (-1%, -595) on YTD 2017.

FSV

YTD 2018 First-time Student visas (FSV): 21,075. Down 4% (-776) on YTD 2017.



Universities sector VSV are up 9% on YTD 2017. However there have been few new recruitments with FSV on par with YTD 2017.



We continue to see a softening in Auckland, whereas Manawatu-Whanganui, Taranaki and Nelson regions have all seen FSV growth compared to YTD 2017.



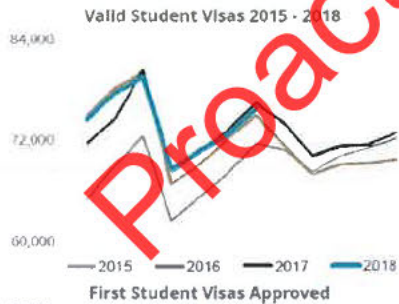
China FSV for the Secondary Schools sector continue to decline which is contributing to the downward trend in total China FSV.



India PTE VSV appear to be in decline despite a positive start to 2018, down 22% on YTD 2017.



The India PTE VSV decline combined with the ongoing decline in the China market are responsible for the overall 14% decline in the PTE sector.



Note: The principal visa indicator is now the VSV. This student visa type shows a stronger, closer and more consistent correlation to student enrolment levels and is less influenced by external factors such as processing speed. Unless otherwise specified, all VSV are a count as of 1 July 2018. To access in-depth visa data, kNZ's Interactive Visa (IV) Tool is available for download on IntelLab

1. Student visas only capture students who enter New Zealand with a student visa. These students are mostly those who are planning to study for more than three months. Students who undertake a course less than three months in duration are not required to enter on a student visa. Students who do choose to enter on a visitor visa (usually from visa-free nationalities) are not captured in this dashboard. Working holiday visas also allow students to study for up to six months. Those who enter New Zealand on a working holiday visa who plan on taking up this option are also not included in this dashboard. These factors will impact the PTE (including English Language Schools) numbers. 2. There is a potential delay of up to three months between students having their visas approved and their actual entry into New Zealand. Therefore, the figures shown here may not necessarily represent the actual number of students currently in New Zealand. 3. This dashboard excludes dependants, applicants under Section 63, and Variation of Conditions.

MARKETS

YTD FSV - Selected markets



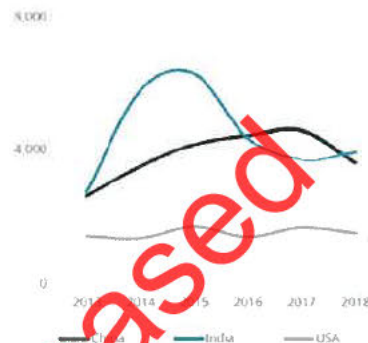
China FSV remain down 21% on YTD 2017.



India FSV continue to recover, up 5% on YTD 2017.



There are more new students from India than there are from China.



SECTORS

Total VSV by sector



+9% Universities sector VSV are up 2,229.

+3% Schools sector VSV are up 503.

-4% ITP sector VSV are down 452.

-14% PTE sector VSV are down 3,054.

REGIONS

Total VSV by region YTD

