



Education New Zealand Briefing

REC
18 JUN 2018
Office Honk plus

Title:	May 2018 student visa summary		
Date:	18 June 2018	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1718-155

Action sought

Addressee:	Action sought:	Deadline:
Minister of Education	<p>Note that Education New Zealand will release the May 2018 student visa numbers on 25 June 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 July 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 withheld under s9(2)(a)

The following departments/agencies have seen this report

<input type="checkbox"/> ERO	<input 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 Withdrawn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:

Proactively released

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Recommendations

Education New Zealand recommends that you

- note** that Education New Zealand will release the May 2018 student visa numbers on 25 June 2018
- forward** this briefing to the Minister of Immigration for his information
- agree** that this briefing is proactively released as part of the July 2018 release

Noted

Agree Disagree



John Goulter
General Manager, Stakeholders and
Communications
Education New Zealand



Hon Chris Hipkins
Minister of Education
20/6/18

Purpose

1. This paper summarises the May 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 June 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.

May 2018 student visa summary

7. For the May 2018 year to date, first-time student visas are down 5% compared to the same period in 2017. The decrease is mainly due to a 21% decrease in Chinese first-time student visas, predominantly in foundation studies at private training establishments in Auckland. The Chinese first-time student visas decrease which started in May 2017 continued and may see the private training establishment sector return to 2014 international student enrolment levels (the point at which the sector rapidly grew following the relaxation of the Rule 18 of the New Zealand Qualifications Framework Programme Approval and Accreditation Rules).
8. At 8 June 2018¹, there were 72,733 valid student visas, which was 1% down on June 2017. Decreases in valid student visas for the private training establishment and institutes of technology and polytechnics sectors offset increases in the university and schools sectors. The increase in university valid student visas reflects a rebalancing of

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.

the market as a higher proportion of international students study at higher-level qualifications.

Next steps

9. On 25 June 2018, ENZ will release the May 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: May 2018 Visa Summary

Visa Summary: May 2018



OVERVIEW

VISAS SOFTEN

== Early Valid Student visas (VSV) growth continues to soften.

VSV YTD 2018 VSV: 72,733.
Stable (-1%, -572) on YTD 2017.

FSV YTD 2018 First-time Student visas (FSV):
16,837. Down 5% (-816) on YTD 2017.

Universities sector VSV are up 9% on YTD 2017, as students move to higher-level qualifications.

We continue to see declines in Auckland. Whereas Canterbury, Otago, Taranaki and Waikato have all increased in VSV compared to YTD 2017.

China's FSV decline continues.

The impact of the China FSV decline may see the PTE sector return to 2014 enrolment levels.

MARKETS

Market	YTD FSV	FSV Proportion	Trendline*
India	3287		
China	2864		
USA	1254		
Japan	928		
Korea	829		
Brazil	829		

* The YTD trends for FSV numbers 2015 to 2018.

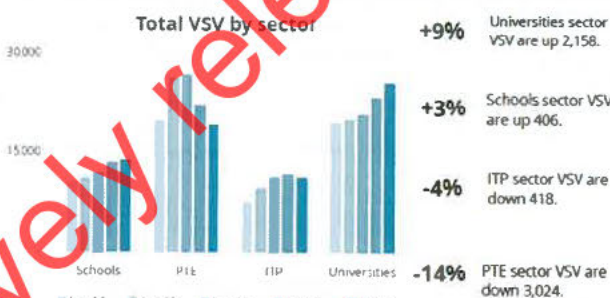
China FSV are down 21% on YTD 2017.

Most of the China FSV decline has occurred within the PTE sector.

India's FSV growth has stabilised, up 6% on last year.

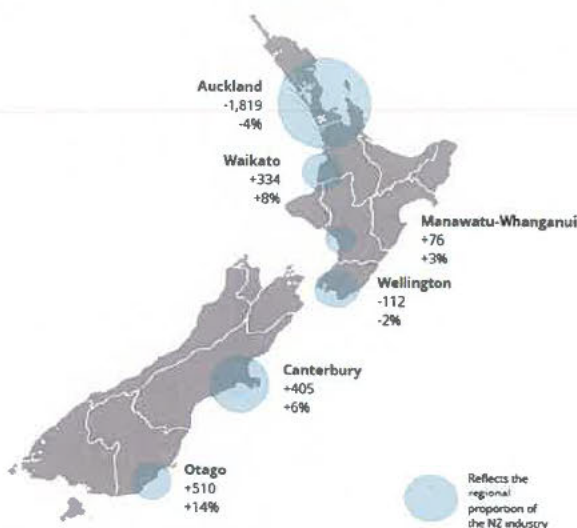
There are more new students from India than there are from China.

SECTORS



REGIONS

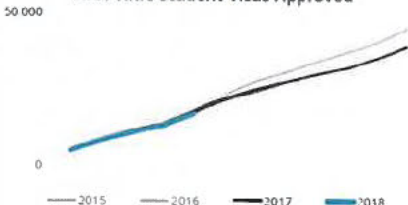
Total VSV by region YTD



Valid Student Visas 2015 - 2018



First-Time Student Visas Approved



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 less influenced by external factors such as processing speed. Unless otherwise specified, all VSV are a count as of 8 June 2018. To access in-depth visa data, ENZ's Interactive Visa (IV) Tool is available for download on IntelliLab.

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 61, and Variation of Conditions.