

Education New Zealand Briefing

Title:	March 2018 student visa summary		
Date:	18 April 2018	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1718-122

Action sought

Addressee:	Action sought:	Deadline:
Minister of Education	<p>Note that Education New Zealand will release the March 2018 student visa numbers on 23 April 2018.</p> <p>Forward this briefing to the Minister of Immigration for his information.</p>	

Contact for telephone discussion (if required)

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Andy McPhee	Intelligence Manager	[REDACTED]	[REDACTED]	x

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 Withdrawn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:

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Recommendations

Education New Zealand recommends that you

- a. **note** that Education New Zealand will release the March 2018 student visa numbers on 23 April 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 May 2018 release

Agree / Disagree



Clive Jones
General Manager, Strategy and Insight
Education New Zealand

Hon Chris Hipkins
Minister of Education

___/___/___

Purpose

1. This paper summarises the March 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 23 April 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 (FSV) to indicate the number of new international students being attracted to New Zealand and valid student visas (VSV) as a lead indicator for international student enrolment numbers.
6. For subsectors that typically attract multiyear enrolments (e.g. an international student undertaking a three-year Bachelors degree in the university sector), a decline in first time student visas is often the first leading indicator of an impending future decline in total enrolments. However, the growing trend towards international students taking shorter postgraduate qualifications may make this important leading indicator less reliable for the purposes of future forecasting.

March 2018 student visa numbers

7. The number of first time student visas approved in the March 2018 calendar year to date was 6% lower compared to the same period in 2017. As the peak processing season of January to March has ended, the results seem to confirm that the positive start to 2018 that was seen in the January 2018 month was the result of the earlier visa processing.
8. The year to date decrease in first time student visa numbers was driven by a decrease in Chinese students entering foundation level courses in preparation for tertiary level study. This decline has been partially offset by an increase in Chinese students entering universities directly. ENZ is undertaking deeper analysis on the continued decline in first time student visas from China to understand the causes and potential impacts on the international education sector.
9. At 1 April 2018 there were 68,613 valid student visas, which was stable compared to the 68,609 valid student visas on 1 April 2017. The university and schools sectors increased,

up 10% and 4% respectively, while the private training establishment (PTE) and institutes of technology and polytechnics sectors decreased. The decrease in the PTE sector drove the decrease in the number of valid student visas for Auckland.

Next steps

10. On 23 April 2018, ENZ will release the March 2018 Visa Summary (appendix one) in its online intelligence portal, [IntelliLab](#).

Proactive release

11. 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.

Appendix One: March 2018 Visa Summary

Visa Summary: March 2018



OVERVIEW

2018 PROSPECTS NOW LOOK MIXED



The positive start to 2018, a result of earlier visa processing, is now flattening out with some sectors down on last year.



The regular recruitment season has concluded and new student visas (FSVs) are down on previous years.

FSV

YTD 2018 FSV: 10,580.
Down 6% (-726) on YTD 2017

VSV

YTD 2018 VSV: 68,613.
Stable (+4) on YTD 2017



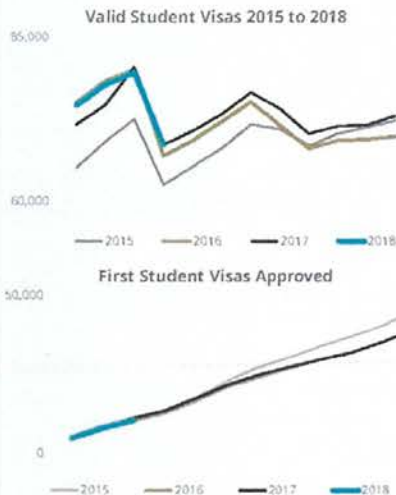
Regional growth indicators remain positive. Though Auckland declined, many other regions grew in VSV for YTD 2018.



Steady growth in the Universities sector continues to shift the balance of the industry towards high-level qualifications.



China FSV continue to decline. A deeper analysis on the China market will be released separately to this summary.



Note: The principal visa indicator is now the Valid Student Visa (VSV). This student visa type shows a stronger, closer and more consistent correlation to student enrolment levels and are less influenced by external factors such as processing speed. Unless otherwise specified, all VSV are a count as of 05 April 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.

MARKETS

Market	YTD FSV	FSV Proportion	Trendline*
India	2262		
China	1706		
Japan	707		
USA	624		
Brazil	564		
Korea	560		

* The YTD trends for FSV numbers 2015 to 2018.



China FSV continue to decline (-2.2%)



China FSV for the PTE sector have been in unseasonal decline since September 2017



India's FSV growth continues, up 5% on last year



Renewed interest in the PTE sector remains, with India FSV up 15% on the low levels of 2017

SECTORS



REGIONS

