



**Education New Zealand Briefing**

<b>Title:</b>	September 2018 student visa summary		
<b>Date:</b>	11 October 2018	<b>Priority:</b>	Medium
<b>Security level:</b>	Unclassified	<b>ENZ ID no:</b>	1819-085

**RECEIVED**  
 11 OCT 2018  
 Office of Hon. H. Hipkins

**Action sought**

Addressee:	Action sought:	Deadline:
	<b>Note</b> that Education New Zealand will release the September 2018 student visa numbers on 25 October 2018.	
Minister of Education	<b>Forward</b> this briefing to the Minister of Immigration for his information.  <b>Agree</b> that this briefing is proactively released as part of the November 2018 release.	

**Contact for telephone discussion (if required)**

Name:	Position:	Telephone:	Cell phone:	1 <sup>st</sup> contact
John Goulter	General Manager Stakeholders and Communications	[Redacted]	[Redacted]	
		<i>Withheld under s9(2)(a)</i>		
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 Withdrawn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 September 2018 student visa numbers on 25 October 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 November 2018 release

Agree / Disagree



John Goulter  
General Manager Stakeholders and  
Communications  
Education New Zealand



Hon Chris Hipkins  
Minister of Education  
23/10/18

Proactively released



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## Purpose

1. This paper summarises the September 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 October 2018.

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## 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.

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## September 2018 student visa summary

7. First-time student visas are down 5% in the September 2018 year to date compared to the same period in 2017. The 21% decline in Chinese first-time student visas is being partly offset by increases in first-time student visas from India, Saudi Arabia, Germany and Nepal.
8. The ongoing decline in Chinese first-time student visas for the private training establishment (which includes the English language sector) is expected to affect the university sector as 50% of these students transition through to university study. This will exacerbate the impact of flat first-time university student visas and the departing 2018 university student cohort.
9. At 1 October 2018<sup>1</sup>, overall there were 1% fewer valid student visas compared to 1 October 2017. Decreases in the number of valid student visas for the private training establishment and the institutes of technology and polytechnics sectors were partly offset

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<sup>1</sup> 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.

by increases in the university and schools sectors. There were fewer valid student visas on 1 October 2017 compared to 1 October 2014.

10. ENZ is continuing to monitor the Chinese and Indian markets due to their ability to impact the international education sector. The success of ENZ's 'volume to value' strategy for India is reflected in the year on year growth in Indian valid student visas for the university sector since 2015, with Indian university students now making up 15% of Indian valid student visas.
11. ENZ expects to finalise and start to implement its' plan to address the decline in Chinese first-time student visas in October 2018.

### Next steps

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

### Proactive release

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13. 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: September 2018 Visa Summary

# Visa Summary: September 2018

### OVERVIEW

#### Fewer students in 2019?

**VSV** YTD 2018 Valid student visas (VSV): 70,762. Down 1% (-678) on October 1 2017.

**FSV** YTD 2018 First-time student visas (FSV): 26,367. Down 5% (-1,406) on YTD 2017.

YTD FSV are now below 2014 numbers.

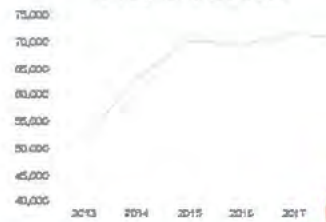
Declining China FSV (-21%, 1,477) are bringing down total FSV as increases in India, Saudi Arabia, Germany, and Nepal markets are insufficient to counter the decline.

The school and university sectors, that have seen consecutive years of flat FSVs, could be impacted by declining student enrolment numbers as early as next year.

New Chinese foundation students in the PTE sector continue to decline. This will flow into the university sector in 2019, and is expected to exacerbate the impact of flat University FSV and the departing 2018 cohort.

We continue to monitor movements within the China and India markets due to their ability to significantly impact the international education sector.

Summary: VSV for 2013 to 2018



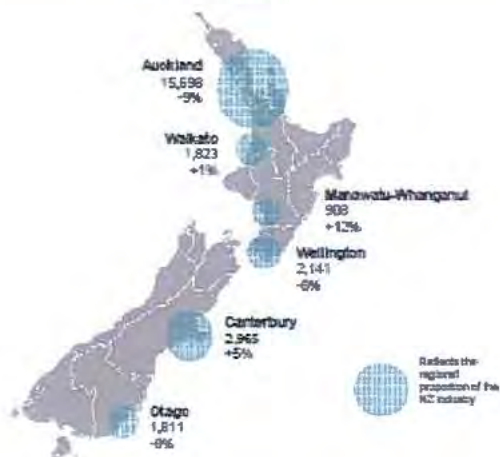
### Sectors

Total VSV by sector



### Regions

Total YTD FSV by region  
Growth/Decline



Note: The principal visa indicator is now the VSV. This student visa type shows a stronger, closer and more consistent correlation to student arrivals levels and is less influenced by external factors such as processing speed. Unless otherwise specified, all VSV are counted on the first of the month. To access detailed visa data, IENZ's Interactive Visa (IV) Tool is available for download on ITeNZ.

1. Student visas only capture students who enter New Zealand with a student visa. These students are primarily those who are starting 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 student visa (usually from visa-free regions) 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 wish to bring 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 dependent applicants under Section 61 and Visas of Conditions.