

**Education New Zealand Briefing**

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17 SEP 2019  
Min Hipkins

<b>Title:</b>	Student visa summary: August 2019		
<b>Date:</b>	10 September 2019	<b>Priority:</b>	Medium
<b>Security level:</b>	Unclassified	<b>ENZ ID no:</b>	1920-031

**Action sought**

Addressee:	Action sought:	Deadline:
Minister of Education	<p>Note that Education New Zealand released the August 2019 student visa summary on 27 August 2019.</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 September 2019 release.</p>	

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

Name:	Position:	Telephone:	Cell phone:	1 <sup>st</sup> contact
Grant McPherson	Chief Executive	[Redacted]	[Redacted]	
Angela Meredith	Accountability 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 Withdrawn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:**

Proactively released

## Education New Zealand Briefing

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### Recommendations

Education New Zealand recommends that you

- a. **note** that Education New Zealand released the August 2019 student visa summary on 27 August 2019

**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 September 2019 release

**Agree / Disagree**



Grant McPherson  
Chief Executive  
Education New Zealand



Hon Chris Hipkins  
Minister of Education

26 / 9 / 19

Proactively released



## Purpose

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1. This paper summarises the August 2019 student visa numbers that Education New Zealand (ENZ) published in [IntelliLab](#), ENZ's intelligence portal for the international education sector and government agencies, on 27 August 2019.

## Background

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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.

## August 2019 student visa summary

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7. There were 10,393 valid student visas<sup>1</sup> on 1 August 2019, down 3% compared to 1 August 2018. The number of valid student visas has now fallen below 2015 levels, driven by decreases in the Chinese and Indian markets. The number of valid student visas was driven by decreases in the private training establishment (down 18%) and the institutes of technology and polytechnic (down 8%) sectors, which were partly offset by an increase in the university sector (up 5%).
8. There were 4% fewer first-time student visas approved in the July year to date compared to the same period in 2018. This was driven by decreases in Auckland (down 16%), Manawatu-Whanganui (down 6%) and Otago (down 2%). The decrease in Auckland was driven by the private training establishment sector, Manawatu-Whanganui by the university sector and Otago by the schools sector.

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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.

9. As at 30 July 2019, Immigration New Zealand had 7,707 student visa applications on hand. The high number of applications that have yet to be decided and the decline in first-time student visa (that started in 2018) are affecting the number of valid student visas. The decline in first-time student visas will exacerbate the low valid student visas numbers. This is likely to result in a decline in international student enrolments in 2019.

#### **Next steps**

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10. On 27 August 2019, ENZ released the *Visa Summary: August 2019* (Appendix One) in its online intelligence portal, [IntelliLab](#).

#### **Proactive release**

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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.

Proactively released



## Appendix One: Visa Summary: August 2019

# Visa Summary: August 2019



### Overview

#### Enrolments likely to be down

**VSV** Valid Student Visas (VSV) for August 2019: 70,393 Down 3% (-2,257) on August 2018.

VSV by sector compared to August 2018:  
 - Schools flat, up 1% (+99)  
 - PTE down 18% (-3,239)  
 - ITP down 8% (-914)  
 - University up 5% (+1,292)

**FSV** Total First-Time Student Visas (FSV) YTD: 23,316 Down 4% (-867) on YTD 2018.

FSV YTD by sector compared to YTD 2018:  
 - Schools flat, up 2% (+75)  
 - PTE down 16% (-1,314)  
 - ITP down 5% (-208)  
 - University up 8% (+585)

FSV decline for Manawatu-Whanganui is attributed to the University sector, whilst the decline in Otago is attributed to the Schools sector.



Total VSV for 2019 have fallen below 2015 levels, driven by decreases in the China and India markets. FSV declines will exacerbate low VSV, likely resulting in further declines in student enrolments for 2019.



There are 7,707 student visas on hand and awaiting processing as of 30 July 2019.

### FSV 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 is less influenced by external factors such as processing speed. Unless otherwise specified, all VSV are a count as of 1 August 2019. To access in-depth visa data, ENZ's Interactive Visa (IV) Tool is available for download on Intellilab.

### Markets

#### VSV for India and China



### Sectors

#### VSV by Sector



### Regions

#### 2019 YTD FSV by region Growth/Decline



Reflects the regional proportion of the NZ industry

1. The source of this student visa data is Immigration New Zealand. 2. 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 the option are also not included in this dashboard. These factors will impact the PTE (including English Language Schools) numbers. 3. 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. 4. This dashboard excludes dependents, applicants under Section 61 and Variation of Conditions.