

Education New Zealand Briefing

Title:	Student visa summary: May 2019		
Date:	14 May 2019	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1819-208

Action sought

Addressee:	Action sought:	Deadline:
	Note that Education New Zealand will release the May 2019 student visa summary on 22 May 2019.	
Minister of Education	Forward this briefing to the Minister of Immigration for his information. Agree that this briefing is proactively released as part of the June 2019 release.	

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact
John Goulter	General Manager, Stakeholders and Communications	[Redacted]	[Redacted]	
Angela Meredith	Accountability Manager	[Redacted]	[Redacted]	x

Withheld under s9(2)(a) of the OIA

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 Withdrawn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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14 MAY 2019
Office of the Minister

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Recommendations

Education New Zealand recommends that you

- note** that Education New Zealand will release the May 2019 student visa summary on 22 May 2019
- forward** this briefing to the Minister of Immigration for his information
- agree** that this briefing is proactively released as part of the June 2019 release

Noted

Agree / Disagree



John Goulter
General Manager, Stakeholders and
Communications
Education New Zealand



Hon Chris Hipkins
Minister of Education
21 / 5 / 19

Proactively released

Purpose

1. This paper summarises the May 2019 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 22 May 2019.

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 2019 student visa summary

7. The number of valid student visas¹ and first-time student visas have continued their year-on-year decline. The high number of student visa applications on hand and awaiting processing continues to limit ENZ's ability to accurately interpret the data and forecast the year ahead.
8. On 1 May 2019, there were 4% fewer valid student visas than on 1 May 2018. This was driven by a 17% decrease in the private training establishment (PTE) sector and a 9% decrease in the institutes of technology and polytechnic (ITP) sector. These decreases were partly offset by a 5% increase in the university sector. Increases in the number of valid student visas were driven by the Nepal, Viet Nam and South African markets.
9. In the April 2019 year to date, first-time student visas were down 7% compared to the same period in 2018. This was driven by decreases in the Indian and Malaysian markets, down 8% and 55% respectively.

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.

10. Fewer first-time student visas were approved for study in Auckland (down 17%), Otago (down 10%) and Manawatu-Whanganui (down 9%) in the April 2019 year to date compared the same period in 2018. More first-time student visas were approved for study in Canterbury (up 13%), the Waikato (up 21%) and Wellington (up 5%).
11. In the April 2019 year to date, there were also 4% fewer returning student visas approved than in the same period in 2018. This was driven by decreases in the PTE and ITP sectors.

Next steps

12. On 22 May 2019, ENZ will release the *Visa Summary: May 2019* (Appendix One) in its online intelligence portal, [IntelliLab](#).

Proactive release

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: Visa Summary: May 2019

Visa Summary: May 2019

ThinkNow

Overview

Early signs of diversification

VSV Total Valid Student Visas (VSV) for May 2019: 67,366. Down 4% (-2,820) on May 2018.

VSV by Sector compared to May 2018:

- PTE down 17% (-3,270)
- ITP down 9% (-973)
- University up 5% (+1,163)

VSV by market compared to May 2018:

- Viet Nam up 8% (+158)
- Philippines up 6% (+99)

FSV Total First-Time Student Visas (FSV) YTD: 12,058. Down 3% (-858) on YTD 2018.

FSV YTD by Sector compared to YTD 2018:

- PTE down 15% (-698)
- ITP down 18% (-422)
- University up 3% (+122)

FSV YTD by market compared to YTD 2018:

- India down 8% (-199)
- Malaysia down 55% (-155)
- Philippines up 14% (+45)

RSV Total Returning Student Visas (RSV) YTD: 23,213. Down 4% (-1,022) on YTD 2018.

RSV YTD by Sector compared to YTD 2018:

- PTE down 16% (-764)
- ITP down 9% (-291)
- University up 3% (+341)



The high number of visas on hold and awaiting processing continues to negatively influence both the FSV and VSV numbers.



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 May 2019. To access in-depth visa data, ENZ's Interactive Visa (IV) Tool is available for download on IntelliLab.

* 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 student visa (usually from the nationalised visa not captured in this dashboard) working holiday visas also show students to study for up to six months. Those who enter New Zealand on a working holiday visa who plan on working up to six months are also not included in this dashboard. These factors will impact the PTE (including English Language Network) numbers. 2. There is a potential delay of up to three months between a student having their visa 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. The dashboard automatically deprioritises applications under section 61 and Violation of Conditions.

Key point

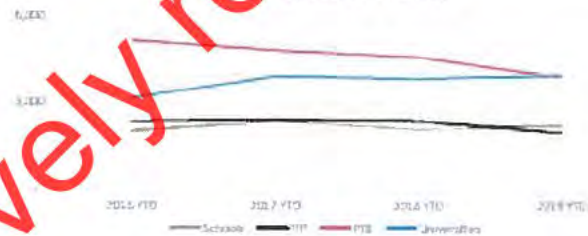
While FSV and VSV student numbers are continuing to decline year on year, we are seeing VSV changes that suggest diversification (Nepal +244, Viet Nam +158, South Africa +118). However the large number of visas requiring processing continues to limit our ability to accurately interpret the data and forecast the year ahead.

Sectors

Total VSV by sector



FSV YTD by sector of study



REGIONS

Total YTD FSV by region
Growth/Decline

