



### Education New Zealand Briefing

<b>Title:</b>	Student visa summary: April 2019		
<b>Date:</b>	15 April 2019	<b>Priority:</b>	Medium
<b>Security level:</b>	Unclassified	<b>ENZ ID no:</b>	1819-183

#### Action sought

Addressee:	Action sought:	Deadline:
Minister of Education	<p><b>Note</b> that Education New Zealand will release the April 2019 student visa summary on 24 April 2019.</p> <p><b>Forward</b> this briefing to the Minister of Immigration for his information.</p> <p><b>Agree</b> that this briefing is proactively released as part of the May 2019 release.</p>	

#### 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]	
Andy McPhee	Intelligence Manager	[Redacted]		x

Withheld under s9(2)(a) of the Official Information Act

#### 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 Withdrawn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:**

RECEIVED

15 APR 2019

office of Hon. Nicky

## Education New Zealand Briefing

<b>Title:</b>	Student visa summary: April 2019		
<b>Date:</b>	15 April 2019	<b>Priority:</b>	Medium
<b>Security level:</b>	Unclassified	<b>ENZ ID no:</b>	1819-183

### Recommendations

Education New Zealand recommends that you

- note** that Education New Zealand will release the April 2019 student visa summary on 24 April 2019
- forward** this briefing to the Minister of Immigration for his information
- agree** that this briefing is proactively released as part of the May 2019 release

Noted

Agree  Disagree



John Goulter  
General Manager, Stakeholders and  
Communications  
Education New Zealand



Hon Chris Hipkins  
Minister of Education

3 / 5 / 19

## Purpose

---

1. This paper summarises the April 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 24 April 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.

## April 2019 student visa summary

---

7. The number of valid student visas<sup>1</sup> and first-time student visas have continued their year on year decline after reaching a peak in 2017. The high number of student visa applications on hand and awaiting processing continues to negatively impact on the number of valid student visas and first-time student visas.
8. Due to the high number of student visa applications awaiting processing, ENZ is not yet able to estimate the number of international students likely to be enrolled with New Zealand providers in 2019.
9. At 1 April 2019, there were 3% fewer valid student visas compared to 1 April 2018. This was driven by decreases in valid student visas for private training establishments (down 15%) and institutes of technology and polytechnics (down 6%). These decreases were partly offset by a 5% increase in the university sector.

---

<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.

10. First-time student visas were down 9% in the March year to date compared to the same period in 2018. This is being driven by decreases in the institute of technology and polytechnic (21%), private training establishment (down 16%) and university (down 2%) sectors. The decline in first-time student visas has been focused on students from China, India and Malaysia.
11. Returning student visas<sup>2</sup> were down 2% in the March year to date compared to the same period in 2018. This was driven by decreases in the private training establishment and institutes of technology and polytechnic sectors while the university sector increased.

### Next steps

---

12. On 24 April 2019, ENZ will release the *Visa Summary: April 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

---

<sup>2</sup> This is the number of subsequent student visas issued after a student has been granted their first student visa. An international student may be issued more than one returning student visa during a year.

## Appendix One: Visa Summary: April 2019

# Visa Summary: April 2019

ThinkNew

### Overview

#### Continuing declines

**VSV** Total Valid Student Visas (VSV) for April 2019: 66,407. Down 3% (-2,206) on April 2018 (3% down on April 2017).

VSV YTD by sector v YTD 2018  
 PTE -15% (-2,965)  
 ITP -6% (-596)  
 University +5% (1,254)

**FSV** Total First-Time Student Visas (FSV) YTD 9,597. Down 9% (-955) on YTD 2018. (down 15% YTD 2017).

FSV YTD by sector v YTD 2018  
 PTE -16% (-578)  
 ITP -21% (-428)  
 University -2% (-74)

**RSV** Total Returning Student Visas (RSV) YTD 19,766. Down 2% (-491) on YTD 2018 (down 3.5% YTD 2017).

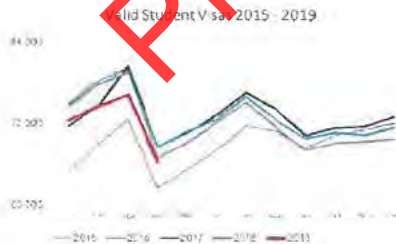
RSV YTD by sector v YTD 2018  
 PTE -11% (-351)  
 ITP -9% (-243)  
 University 3% (325)



FSV Market declines are centred in China (-199), India (-318), and Malaysia (-133). RSV declines are centred in China (-160) and Japan (-94).



The high number of visas on hand and awaiting processing continues to negatively influence both the FSV and VSV numbers (by virtue of fewer VSV in the system).



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

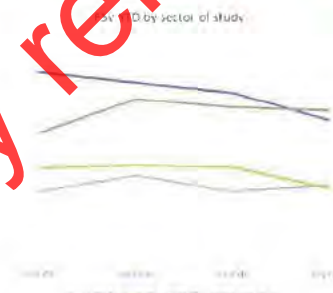
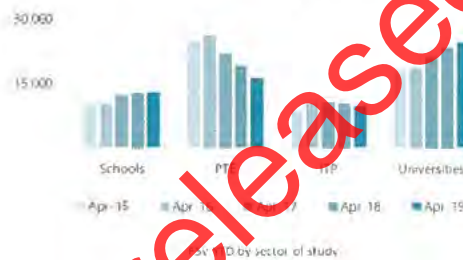
1. Student visas only capture students who enter New Zealand with a student visa. These students are mostly those who are planning to study for more than three months. Students who undertake a course less than three months in duration are not required to enter on a student visa. Students who do choose 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.

### Key point

New (FSV) and existing (VSV) student numbers are continuing to decline year on year from the zenith in 2017. However, the large number of visas requiring processing continues to hamper our ability to forecast the year ahead. Of concern is the continuing decline in new students for the PTE and ITP sectors. However, this isn't entirely unexpected given changes to post-study work rights.

### Sectors

#### Total VSV by sector



### REGIONS

#### Total YTD FSV by region

Growth/Decline

