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Education New Zealand Briefing

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Title:	Student visa summary: January 2019		
Date:	15 February 2019	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1819-130

Action sought

Addressee:	Action sought:	Deadline:
	Note that Education New Zealand will release the January 2019 student visa summary on 25 February 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 March 2019 release.	

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact
Grant McPherson	Chief Executive	[Redacted]	[Redacted]	
Andy McPhee	Intelligence Manager	[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 Withdrawn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

Title:	Student visa summary: January 2019		
Date:	14 February 2019	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1819-130

Recommendations

Education New Zealand recommends that you

- note** that Education New Zealand will release the January 2019 student visa summary on 25 February 2019
- forward** this briefing to the Minister of Immigration for his information
- agree** that this briefing is proactively released as part of the March 2019 release

Noted

Agree / Disagree



Grant McPherson
Chief Executive
Education New Zealand



Hon Chris Hipkins
Minister of Education
25/2/19

Purpose

1. This paper summarises the January 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 25 February 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.

January 2019 student visa summary

7. In January 2019 there were 4,145 first-time student visas approved, down 5% on January 2018. However, as previously reported to you (ENZ 1819-121 refers) Immigration New Zealand (INZ) reports that large volumes of student visas applications are being received at present.
8. INZ advised on 29 January 2019 that approximately 8,500 student visa applications are on hand. They also advise that the volume of student visas received offshore is up 6.5% in the November 2018 to January 2019 period compared to November 2017 to January 2018. Increases have occurred in India (41%), China (13.4%), Japan (13.2%) and Korea (9.5%), while the United States of America declined by 7.5%.
9. ENZ and INZ are working to develop a joint briefing for you and the Minister of Immigration to provide further advice on student visa processing, including detailed statistics about the current situation.

10. Overall, January is too early to accurately predict what 2019 could look like, ENZ expects to be able to assess what the year ahead will look like for international student enrolments when the April 2019 valid and first-time student numbers are available.
11. At 1 February 2019¹, there were 5% fewer valid student visas compared to 1 February 2018. This was due to decreases in valid student visas for private training establishments (down 17%) and institutes of technology and polytechnics (down 7%).

Next steps

12. On 25 February 2019, ENZ will release the *Visa Summary: January 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

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.

Appendix One: Visa Summary: January 2019

Visa Summary: January 2019



Overview

Too early to tell

VSV
Total Valid Student Visas (VSV) for February 2019: 74,533. Down 5% (-3,233) on February 2018.

VSV YTD for PTE are down 17% (-3,556) and ITP YTD VSV are down 7% (-832). Declines upon declines

FSV

Total First-Time Student Visas (FSV) YTD 4,145. Down 15% (-711) on YTD 2018.

FSV YTD for PTE are down 29% (-384) and ITP FSV YTD are down 28% (-252). Declines on declines.



However, Immigration NZ (INZ) advised on 29 January 2019 that approximately 8,500 student visas were on hand.

INZ advise that overall, the volume of student visa applications received is up 6.5% on the November-January period in 2017/2018.

Substantial number changes in visa applications submitted offshore (most of these will be first time students) have been noted from some markets:

- India +41%
- China +13.4%
- Japan +13.2%
- Korea +9.5%
- USA -7.5%



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

Key point

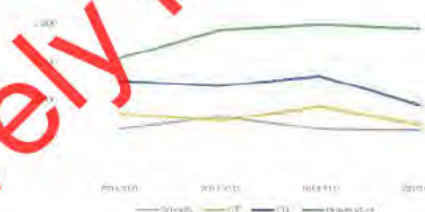
January is too early to accurately predict what the year ahead could be looking like. Indeed, it won't be until April that a firm enough picture on the year ahead can be formed. This year the normal paucity of information is exacerbated through having approximately 8,500 FSV on hand.

Sectors

Total VSV by sector



FSV YTD by sector of study



REGIONS

Total YTD FSV by region
Growth/Decline



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