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NEW ZEALAND
EDUCATION

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Education New Zealand Briefing

Title:	August 2018 student visa summary		
Date:	17 September 2018	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1819-070

Action sought

Addressee:	Action sought:	Deadline:
	Note that Education New Zealand will release the August 2018 student visa numbers on 24 September 2018.	
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 October 2018 release.	

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact
John Goulter	Acting Chief Executive	[Redacted]	[Redacted]	
Andy McPhee	Intelligence Manager	[Redacted]	[Redacted]	x

Withheld under s9(2)(a)

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 Withdrawn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:

[Empty text area for comments]

Proactively released

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Recommendations

Education New Zealand recommends that you

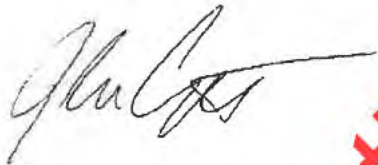
- a. **note** that Education New Zealand will release the August 2018 student visa numbers on 24 September 2018

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 October 2018 release

Agree / Disagree



John Goulter
Acting Chief Executive
Education New Zealand



Hon Chris Hipkins
Minister of Education

18/9/18

Proactively released

Purpose

1. This paper summarises the August 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 24 September 2018.

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.

August 2018 student visa summary

7. First-time student visas are down 3% in the August 2018 year to date compared to the same period in 2017. This is being driven by declines in first-time student visas from China, United States, Viet Nam and the Philippines which are being partly offset by increased visas from India, Saudi Arabia, Germany and Nepal. The increase in Indian first-time student visas is due to increased visas for study in the private training establishment (which includes the English language sector) and university sectors.
8. The ongoing declines in the first-time student visas for foundation studies in the private training establishment sector are expected to affect the university sector, exacerbating the impact of flat first-time university student visas. This is due to the decrease in Chinese first-time students undertaking foundation studies, 50% of whom transition through to university.

9. At 1 September 2018¹, there were 1% fewer valid student visas in total compared to September 2017. There was a 14% decrease in valid student visas for the private training establishment sector and a 5% decrease for the institutes of technology and polytechnics sector. Both the university and schools sectors increased, up 10% and 3% respectively.
10. ENZ is continuing to monitor the Chinese and Indian markets due to their ability to impact the international education sector. ENZ is developing a plan to address the decline in Chinese first-time student visas.

Next steps

11. On 24 September 2018, ENZ will release the August 2018 Visa Summary (Appendix One) in its online intelligence portal, [IntelliLab](#).

Proactive release

12. 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: August 2018 Visa Summary

Visa Summary: August 2018

ThinkNow

OVERVIEW

MIND THE FLOW-ON IMPACTS

VSV YTD 2018 Valid Student Visas (VSV): 69,833. Down 1% (-474) on 1 September 2017.

FSV YTD 2018 First-time Student visas (FSV): 26,552. Down 3% (-942) on YTD 2017.

FSV levels are being shaped by a collective of movements: declines in the China, USA, Viet Nam and Philippines markets - offset by increases in the India, Saudi Arabia, Germany and Nepal markets.

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

The ongoing FSV decline in Foundation Studies in the PTE sector will see flow-on declines into the Universities sector, exacerbating the impact of the flat Universities FSV.

We continue to monitor movements within the China and India markets due to their ability to significantly impact our industry.



India FSV continue to recover in the PTE and Universities sectors.



Nepal FSV continue to grow in the PTE sector whilst Saudi Arabia FSV are up in the Schools and Universities sectors.*

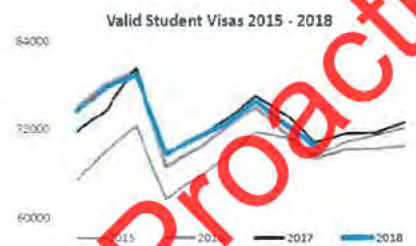
*This may be a result of political tensions between Canadian and Saudi officials.

SECTORS

YTD VSV vs YTD FSV



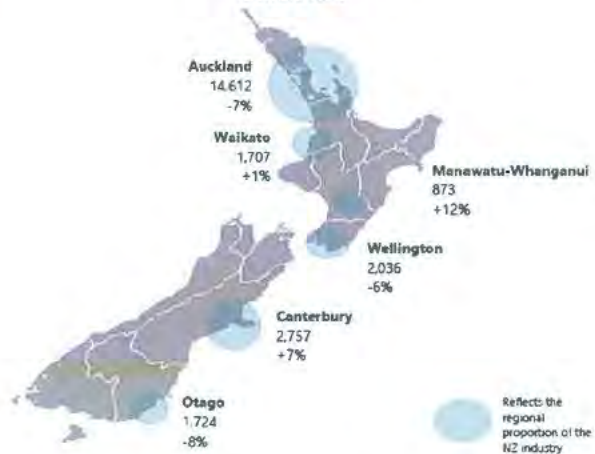
Sector	VSV	FSV
Schools	+3%	-7%
PTE	-14%	-6%
ITP	-5%	0%
Universities	+10%	0%



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 September 2018. To access in-depth visa data, ENZ's Interactive Visa (IV) Tool is available for download on Intell-Lab.

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 the dashboard. Working holiday visas also allow students to study for up to 24 months. Those who enter New Zealand on a working holiday visa who plan on taking up the option are also not included in the dashboard. These factors will impact the FTE (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.