

Education New Zealand Briefing

Title:	February 2018 student visa summary		
Date:	9 March 2018	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1718-105

Action sought

Addressee:	Action sought:	Deadline:
Minister of Education	<p>Note that Education New Zealand will release the February 2018 student visa numbers on 12 March 2018.</p> <p>Forward this briefing to the Minister of Immigration for his information.</p>	

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact
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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 Withdrawn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:

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Recommendations

Education New Zealand recommends that you

- a. **note** that Education New Zealand will release the February 2018 student visa numbers on 12 March 2018

Noted

- b. **forward** this briefing to the Minister of Immigration for his information



Clive Jones
**General Manager, Strategy and
Insight**
Education New Zealand

Hon Chris Hipkins
Minister of Education

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Purpose

1. This paper summarises the February 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 12 March 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 visa¹.
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 (FSV) to indicate the number of new international students being attracted to New Zealand and valid student visas² (VSV) as a lead indicator for international student enrolment numbers.
6. For subsectors that typically attract multiyear enrolments (e.g. an international student undertaking a three year Bachelors degree in the university sector), a decline in first time student visas is often the first leading indicator of an impending future decline in total enrolments. However, the growing trend towards international students increasingly taking shorter postgraduate qualifications may make this important leading indicator less reliable for the purposes of future forecasting.

February 2018 student visa numbers

7. The number of first time student visas approved in the February 2018 calendar year to date was 2% lower compared to the same period in 2017. As the peak processing time for student visas is February to March, external factors may have influenced the increase in first time student visas that had been seen in January 2018.
8. The decrease in first time student visa numbers was driven by China, the United States and Latin America and was partly offset by increases in India, Nepal and Thailand. Notably, the 2018 calendar year to date saw a continuation of the declining trend in first

¹ There are approximately 60 visa waiver countries whose citizens can be granted visitors visas on arrival for stays of three months or less. Some visa waiver countries are major student markets such as Korea and Japan.

² Valid student visas are the number of people holding a student visa at the beginning of each month.

time Chinese student visa numbers being below the first time student visa numbers from the same month in the previous year – this trend started in May 2017.

9. At 1 March 2018 there were 79,552 valid student visas, a 1% decrease compared to 1 March 2017. The PTE sector, down 14%, was largely offset by increases in all the other sectors. The decrease in the PTE sector drove the decrease in the valid student visas in Auckland.

Next steps

10. On 12 March 2018, ENZ will release the February 2018 student visa numbers in its online intelligence portal, [IntelliLab](#).

Visa Summary: February 2018

OVERVIEW

2018 ON PAR WITH 2017



All visa types are now on par with the same time last year



External factors may have influenced an earlier increase in January 2018 visa approvals.

VSV

79,552. Stable, -1% (-866) on YTD 2017

FSV

8,064. Stable, -2% (-136) on YTD 2017



Regional growth indicators remain positive. Though Auckland's growth is flat, many other regions grew for YTD 2018



The rebalance towards high-level qualifications continued as VSV for the universities sector increased as VSV for the PTE sector declined

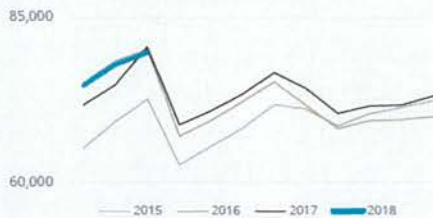


FSV for India, Nepal and Thailand increased in YTD 2018 whilst China, USA and Latin America declined

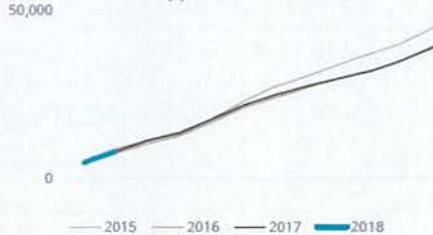


Increased FSV for China in 2015-2016 have resulted in increased RSV. The eventual anticipated decline in RSV will result in an overall decrease in China VSV and enrolments.

VSV in 2015-2018



FSV approved - cumulative



Note: The principal visa indicator is now the Valid Student Visa (VSV). This student visa type shows a stronger, closer and more consistent correlation to student enrolments levels and are less influenced by external factors such as processing speed. Unless otherwise specified, all VSV are a count as of the 01 March 2018. 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 dependents, applicants under Section 61, and Variation of Conditions.

MARKETS

Market	FSV YTD 2018	FSV Proportion	Trendline*
India	1,953		
China	1,119		
USA	605		
Brazil	415		
Japan	387		
Korea	385		



India had an increase of 24% in FSV, mostly in Auckland



PTE FSV for India increased by 194 (68%) compared to YTD 2017



China FSV are down 22% and have been declining since mid 2017



USA FSV are down 27% and may be a result of earlier processing in 2017

SECTORS

Total VSV by sector



Most sectors are up

+7%

Universities sector VSV are up 1,789

+4%

Schools sector VSV are up 579

+0%

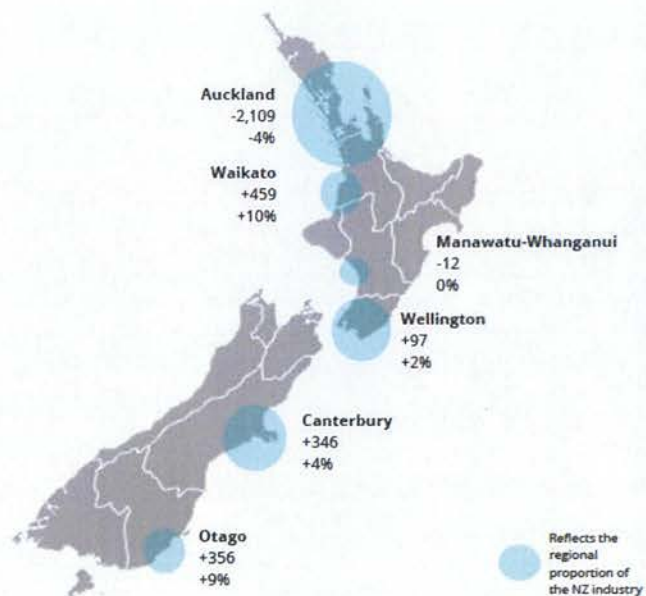
ITP sector VSV are stable (up 5)

-14%

PTE sector VSV are down 3,617

REGIONS

Total VSV by region YTD



Reflects the regional proportion of the NZ industry