



Education New Zealand Briefing

Title:	Student visa summary: March 2019		
Date:	19 March 2019	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1819-159

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19 MAR 2019

O'Brien, Hon. H. P. C.

Action sought

Addressee:	Action sought:	Deadline:
Minister of Education	<p>Note that Education New Zealand will release the March 2019 student visa summary on 26 March 2019.</p> <p>Forward this briefing to the Minister of Immigration for his information.</p> <p>Agree that this briefing is proactively released as part of the April 2019 release.</p>	

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact
John Goulter	General Manager, Stakeholders and Communications	[Redacted]	[Redacted]	
Andy McPhee	Intelligence Manager	[Redacted]		x

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 Withdrawn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:

Proactively released

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Recommendations

Education New Zealand recommends that you

- a. **note** that Education New Zealand will release the March 2019 student visa summary on 26 March 2019
- b. **forward** this briefing to the Minister of Immigration for his information
- c. **agree** that this briefing is proactively released as part of the April 2019 release

Noted

Agree / Disagree



John Goulter
General Manager, Stakeholders and
Communications
Education New Zealand



Hon Chris Hipkins
Minister of Education

11419

Proactively released

Purpose

1. This paper summarises the March 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 26 March 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.

March 2019 student visa summary

7. At 1 March 2019¹, there were 4% fewer valid student visas compared to 1 March 2018. This was due to decreases in valid student visas for private training establishments (down 19%) and institutes of technology and polytechnics (down 11%). These decreases were partly offset by increases in the university (up 4%) and schools (up 8%) sectors.
8. First-time student visas were down 12% in the February year to date compared to the same period in 2018. This is being driven by decreases in the private training establishment and institute of technology and polytechnic sectors, which are partly offset by increases in the university and schools sectors. However, the high number of student visa applications on hand and awaiting processing is negatively influencing the number of valid student visas and first-time student visas.
9. 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 is up 6.5% in the

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.

November 2018 to January 2019 period compared to November 2017 to January 2018. However, these visas are awaiting processing.

10. Overall, it is still too early to accurately predict what 2019 could look like. The earliest that ENZ may be able to assess what the year ahead will look like for international student enrolments will be when the April 2019 valid and first-time student numbers are available.

Next steps

11. On 26 March 2019, ENZ will release the *Visa Summary: March 2019* (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

Appendix One: Visa Summary: March 2019

Visa Summary: March 2019



Overview

Still too early to tell

Key point

It is still too early to accurately predict what the year ahead could be looking like, indeed, it won't be until April at the earliest that a firm enough picture on the year ahead can be formed.

VSV

Total Valid Student Visas (VSV) for March 2019: 76,178 Down 4% (-3,374) on March 2018.

VSV for PTE are down 19% (-4,069) and ITP VSV are down 11% (-1,503).

FSV

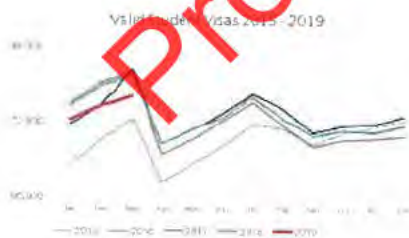
Total First-Time Student Visas (FSV) YTD 7,059. Down 12% (-958) on YTD 2018.

FSV YTD for PTE are down 20% (-501) and ITP FSV YTD are down 36% (-638). Declines on declines.



The high number of visas on hand and awaiting processing is negatively influencing both the FSV and VSV numbers (by virtue of less FSV in the system). In addition, VSV numbers are bolstered until 31 March when the visas of those currently in study expire.

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



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

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 dependent applicants under Section 51, and Variation of Conditions.

Sectors

Total VSV by sector



VSV YTD by sector of study



REGIONS

Total YTD FSV by region
Growth/Decline

