

TR18. 9762



Education New Zealand Briefing

Title:	October 2018 student visa summary		
Date:	19 November 2018	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1819-096

RECEIVED
 19 NOV 2018
Office of Hon. H. Peters

Action sought

Addressee:	Action sought:	Deadline:
	Note that Education New Zealand will release the October 2018 student visa numbers on 26 November 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 January 2019 release.	

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact
John Goulter	General Manager Stakeholders and Communications	[Redacted]	[Redacted]	
		<i>Withheld under s9(2)(a)</i>		
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 Withdrawn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 October 2018 student visa numbers on 26 November 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 January 2019 release

Agree / Disagree



John Goulter
General Manager Stakeholders and
Communications
Education New Zealand



Hon Chris Hipkins
Minister of Education

23/11/18

Purpose

1. This paper summarises the October 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 26 November 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.

October 2018 student visa summary

7. First-time student visas are down 4% in the October 2018 year to date compared to the same period in 2017. This is being driven by a 33% decline in Chinese first-time student visas for the private training establishment sector. In the same period, Chinese returning student visas for the private training establishment sector are also down by 21% compared to 2017.
8. At 1 November 2018¹, overall there were 2% fewer valid student visas compared to 1 November 2017. This was due to 31% fewer Chinese valid student visas in the private training establishment sector. The decline in Chinese valid student visas for the sector reflects the decrease in both first-time and returning student visas.
9. ENZ expects the decline in valid student visas for the private training establishment sector to be reflected in 2018 international student enrolments and lower economic value for the sector when the 2018 full year enrolments are available in mid-2019.

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.

10. Looking ahead to 2019 international student enrolments, the normal progression of Chinese students is to enrol in the university sector following study in the private training establishment sector. Therefore, in 2019 ENZ expects university enrolments to start being affected by the decrease in Chinese students enrolled with the private training establishment sector.

Next steps

11. On 26 November 2018, ENZ will release the October 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

Appendix One: October 2018 Visa Summary

Visa Summary: October 2018

ThinkNow

OVERVIEW

PTE ENROLMENTS LIKELY TO FALL FURTHER IN 2018

VSV Total Valid Student Visas (VSV) for YTD 2018: 70,390. Down 2% (-1,193) on YTD 2017.

FSV YTD 2018 First-Time Student Visas (FSV): 30,466. Down 4% (-1,426) on YTD 2017.

Total VSV for China, our most valuable market, are 24,717. Down 5% on YTD 2017. Total FSV for China are down 20% on YTD 2017.

This is because China VSV for the PTE sector have been in decline. They are now down 31% compared to YTD 2017.

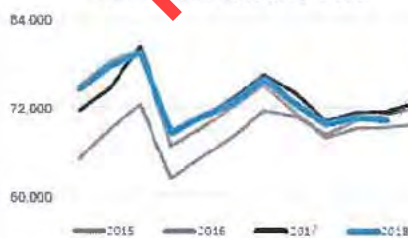
ENZ expects this decline will also manifest as a decrease in student enrolments and value for the PTE sector for 2018.

This decline is the result of a fall in both new students (FSV) and renewing students (RSV).

Given the normal progression of Chinese PTE students to Universities, ENZ expect University enrolments to be affected by this decline as early as the start of 2019.

Much of this decline is concentrated in the Auckland region, where VSVs are down 6% (-2,011) on YTD 2017. ENZ anticipate a drop in enrolments and value for the region in 2018.

Valid Student Visas 2015 - 2018



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 4 November 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 dependants, applicants under Section 61, and Variation of Conditions.

KEY POINT

China PTE VSV



↓ 33%

China FSV for the PTE sector have been in decline since mid-2017. They are now down 31% on YTD 2017.

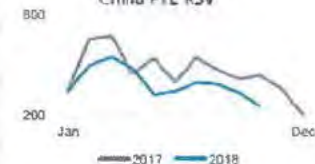
↓ 21%

China RSV for the PTE sector have not recovered as seasonally expected in 2018. They are now down 21% on YTD 2017.

China PTE FSV



China PTE RSV



REGIONS

Total YTD FSV by region Growth/Decline

