

## Education New Zealand Briefing

<b>Title:</b>	Student visa summary: June 2019		
<b>Date:</b>	19 June 2019	<b>Priority:</b>	Medium
<b>Security level:</b>	Unclassified	<b>ENZ ID no:</b>	1819-221

### Action sought

Addressee:	Action sought:	Deadline:
Minister of Education	<p><b>Note</b> that Education New Zealand will release the June 2019 student visa summary on 27 June 2019.</p> <p><b>Forward</b> this briefing to the Minister of Immigration for his information.</p> <p><b>Agree</b> that this briefing is proactively released as part of the July 2019 release.</p>	

### Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 <sup>st</sup> contact
Grant McPherson	Chief Executive	[Redacted]	[Redacted]	
Andrew McPhee	Intelligence Manager	[Redacted]	[Redacted]	x

*Withheld under s9(2)(a) of the OIA*

### 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 Withdrawn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:

**RECEIVED**  
 19 JUN 2019  
*office de non hipis*

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## Recommendations

Education New Zealand recommends that you

- a. **note** that Education New Zealand will release the June 2019 student visa summary on 27 June 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 July 2019 release

Noted

Agree / Disagree



Grant McPherson  
Chief Executive  
Education New Zealand



Hon Chris Hipkins  
Minister of Education

28/6/19

## Purpose

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1. This paper summarises the June 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 27 June 2019.

## Background

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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.

## June 2019 student visa summary

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7. The number of valid student visas<sup>1</sup> and first-time student visas have continued their year-on-year decline. The high number of student visa applications on hand and awaiting processing continues to limit ENZ's ability to accurately interpret the data. The traditional mid-year visa peak processing period is currently commencing.
8. There were 68,861 valid student visas on 1 June 2019, down 5% compared to 1 June 2018. This was driven by decreases in the private training establishment (down 17%) and the institutes of technology and polytechnic (down 9%) sectors which were partly offset by an increase in the university sector (up 2%).
9. In the May 2019 year to date, first-time student visas were down 8% compared to the same period in 2018. Along with a 10% decline in the Indian market, declines in first-time student visas have occurred in markets that are traditionally viewed as less volatile. The

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<sup>1</sup> 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.

number of first-time student visas have declined in the European (down 19%), North American (down 18%) and Oceania (down 18%) markets.

10. The schools and the university sectors are the only sectors to show growth in the number of first-time student visas, with both sectors up 4%. Growth in the schools sector is evenly split between primary and secondary schools.
11. In the April 2019 year to date, there were also 4% fewer returning student visas approved than in the same period in 2018. This was driven by decreases in the private training establishment and institutes of technology and polytechnic sectors.

### Next steps

12. On 27 June 2019, ENZ will release the *Visa Summary: June 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

## Appendix One: Visa Summary: June 2019

# Visa Summary: June 2019

ThinkNew

### Overview

### Key point

#### Visas remain down

New (FSV) and existing (VSV) student numbers are continuing to decline year on year. The FSV declines are now in markets traditionally viewed as less volatile (Europe (-347, -19%), North America (-532, -18%) Oceania (-71, -18%)).

**VSV** Valid Student Visas (VSV) for June 2019: 68,861  
Down 5% (-3,872) on June 2018.

VSV YTD by Sector compared to YTD 2018:  
- PTE down 17% (-3,329)  
- ITP down 9% (-1,076)  
- University up 2% (+629)

**FSV** Total First-Time Student Visas (FSV) YTD: 15,462  
Down 8% (-1,353) on YTD 2018.

FSV YTD by Sector compared to YTD 2018:  
- PTE down 19% (-1,116)  
- ITP down 18% (-525)  
- University up 4% (+196)

FSV YTD by market compared to YTD 2018:  
- India down 10% (-344)  
- Malaysia down 44% (-136)  
- Europe down 19% (-347)

**RSV** Total Returning Student Visas (RSV) YTD: 25,535  
Down 4% (-1,037) on YTD 2018.

RSV YTD by Sector compared to YTD 2018:  
- PTE down 16% (-784)  
- ITP down 9% (-291)  
- University up 3% (+341)

RSV YTD by market compared to YTD 2018:  
- China down 6% (-870)  
- India down 1% (-35)  
- Malaysia down 12% (-77)  
- Viet Nam up 12% (+84)  
- Nepal up 93% (+131)

The traditional mid-year visa peak, that is currently commencing, is in addition to the high number of visas on hand that require processing.



Proactively released

### Sectors

FSV YTD by sector of study



The schools and the universities sectors are the only sectors to show growth in new students. Growth in the schools is evenly split between primary and secondary, with university growth likely reflecting the improved post-study work-rights for Level 7 degrees and above.

By comparison, YTD FSV for PTEs are now 30% down on their peak in 2016.

### REGIONS

Total YTD FSV by region  
Growth/Decline



**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 June 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 opt 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 includes dependants, applicants under Section 61 and Variation of Conditions.