

Education New Zealand Briefing

Title:	Student visa summary: July 2019		
Date:	15 July 2019	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1920-008

Action sought

Addressee:	Action sought:	Deadline:
	<p>Note that Education New Zealand will release the July 2019 student visa summary on 23 July 2019.</p>	
Minister of Education	<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 August 2019 release.</p>	

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact
Grant McPherson	Chief Executive	[REDACTED]	[REDACTED]	
Andrew McPhee	Intelligence Manager	[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 Withdrawn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:

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Recommendations

Education New Zealand recommends that you

- note** that Education New Zealand will release the July 2019 student visa summary on 23 July 2019
- forward** this briefing to the Minister of Immigration for his information
- agree** that this briefing is proactively released as part of the August 2019 release

Noted

Agree / Disagree



Grant McPherson
Chief Executive
Education New Zealand



Hon Chris Hipkins
Minister of Education

16/7/19

Purpose

1. This paper summarises the July 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 23 July 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.

July 2019 student visa summary

7. There were 75,466 valid student visas¹ on 1 July 2019, down 3% compared to 1 July 2018. As at 1 July 2019, Immigration New Zealand had 7,743 student visa applications on hand. The high number of applications that have yet to be decided and the decline in first-time student visa (that started in 2018) are affecting the number of valid student visas.
8. The decline in valid student visas was driven by decreases in the private training establishment (down 19%) and the institutes of technology and polytechnic (down 7%) sectors which were partly offset by an increase in the university sector (up 5%).
9. There were 7% fewer first-time student visas approved in the June 2019 year to date compared to the June 2018 year to date. This was driven by decreases in the private training establishment (down 18%) and institutes of technology and polytechnic (down

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.

12%) sectors. The private training establishment sector has had 40% fewer first-time student visas compared to the year to June 2016.

10. The decline in first-time student visas has been driven by Europe (down 14%), Malaysia (down 47%) and India (down 2%).
11. For the June 2019 month, 1% fewer first-time student visas were approved compared to the June 2018 month. This may be an aberration or the precursor to a flattening of the general decline in first-time student visas that started in 2018. Education New Zealand will continue to monitor this.

Next steps

12. On 23 July 2019, ENZ will release the *Visa Summary: July 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: July 2019

Visa Summary: July 2019



Overview

All visas types remain down

VSV Valid Student Visas (VSV) for July 2019: 73,466. Down 3% (-2,481) on July 2018.

VSV YTD by Sector compared to YTD 2018:
 - PTE down 19% (-3,744)
 - ITP down 7% (-800)
 - University up 5% (+1,504)

FSV Total First-Time Student Visas (FSV) YTD: 19,661. Down 7% (-1,388) on YTD 2018.

FSV YTD by Sector compared to YTD 2018:
 - PTE down 18% (-1,203) (-40% to June 2016)
 - ITP down 12% (-431)
 - University up 3% (+195)

FSV YTD by market compared to YTD 2018:
 - China up 2% (+55)
 - India down 2% (-88)
 - Malaysia down 47% (-237)
 - Europe down 14% (-383)

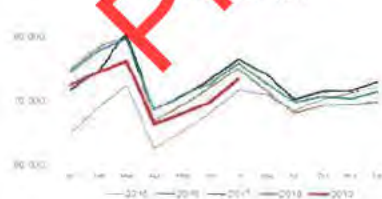
RSV Total Returning Student Visas (RSV) YTD: 27,966. Down 4% (-1,136) on YTD 2018.

RSV YTD by Sector compared to YTD 2018:
 - PTE down 18% (-1,335)
 - ITP down 10% (-430)
 - University up 4% (+475)



If FSV approvals continue to decline unabated, total student enrolments can be expected to be further down in the 2018 year.

Valid Student Visas 2015 - 2019



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

Key points

New student numbers (FSV) remain down on the YTD 2018. However, FSV for June are only down 1% (-35) when compared with June 2018. This could be an aberration or the precursor to a flattening of the general decline that commenced in 2018. However, it is too early to conclusively identify at this point.

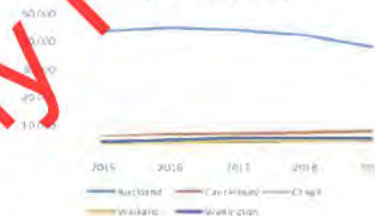
Existing student numbers (VSV) are continuing to decline year on year partly due to the decline in new students that commenced last year, and the 7,743 student visas on hand and awaiting processing on 1 July 2019.

Sectors

Total VSV by sector

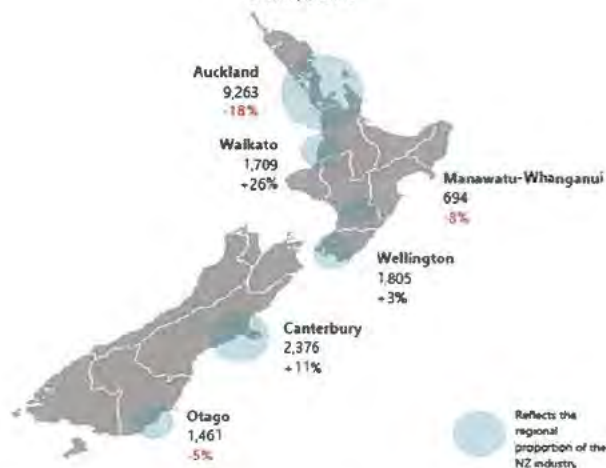


FSV by region by year



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 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.