Student Visa Dashboard

April 2016

NEW ZEALAND IMMIGRATION

About the Student Visa Dashboard

- The following dashboard was developed by Education New Zealand and is based on Immigration New Zealand (INZ) data on issued student visas. This data source provides the latest data available on the international education sector, as there is only a one month lag between student visas approved and INZ publishing the data. Student visa data is a strong indicator of whether students are entering, remaining in or leaving New Zealand and can be used for predicting future enrolment trends.

- Student visa trends allow us to analyse two key indicators: 1) growth of new students and 2) retention of students.

- We use first time student visa data as an indicator of growth as it represents new students and the pipeline of students entering New Zealand.

- Total student visa data gives us an overview of all student visas (i.e. first time student visas as well as students renewing their visas).

- We can analyse the retention of students by subtracting first time student visas from total student visas.

Caveats and notes

1. Student visas vs. visitor visas:
    - 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 NZ on a working holiday visa who plan on taking up this option are also not included in this dashboard
    - These factors will impact the Private Training Establishments (PTEs), including English Language Schools (ELS) numbers.

2. Student visas vs. enrolments:
    - 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. Other exclusions:
    - This dashboard excludes dependants, applicants under Section 61, and Variation of Conditions. Dashboards prior to May 2015 include approvals from "all" applicants, including dependants.

How to read the dashboard

Name of the market/region/sector

Indicator of the overall performance of the market

The monthly/YTD result:

- Actual change in visa numbers
- Percentage change in visas
- Directional indicator

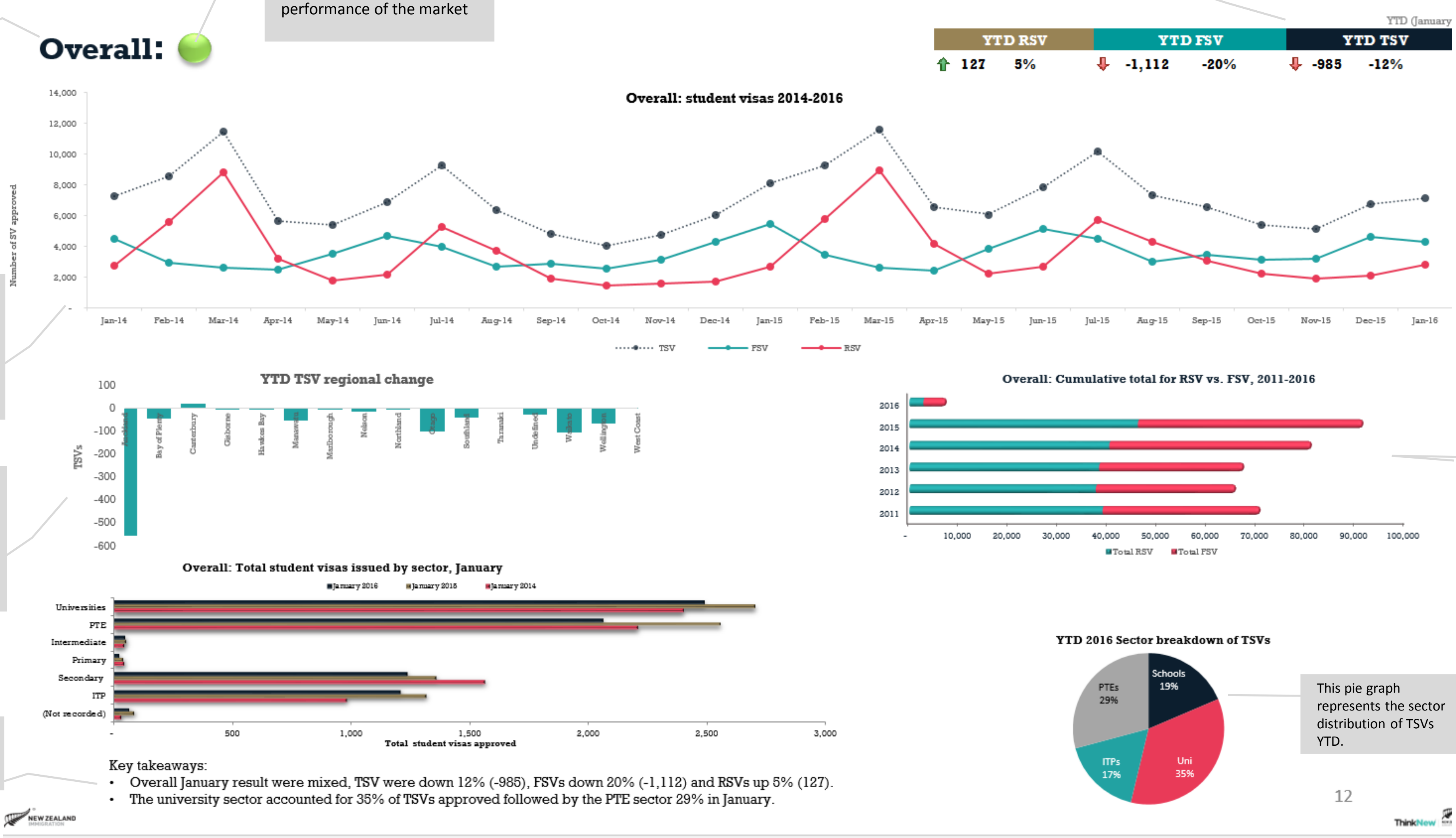
These graphs show a monthly trend of actual TSV, FSV and RSV approvals from 2014 – 2016.

These graphs shows the regional change for the market

Key or interesting trends to consider

Shows the calendar year results for FSVs + RSVs. This also demonstrates the proportional make-up of a market as we progress through the year, while comparing the overall result from previous years.

This pie graph represents the sector distribution of TSVs YTD.



Overall student visa trends

April 2016

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Executive Summary

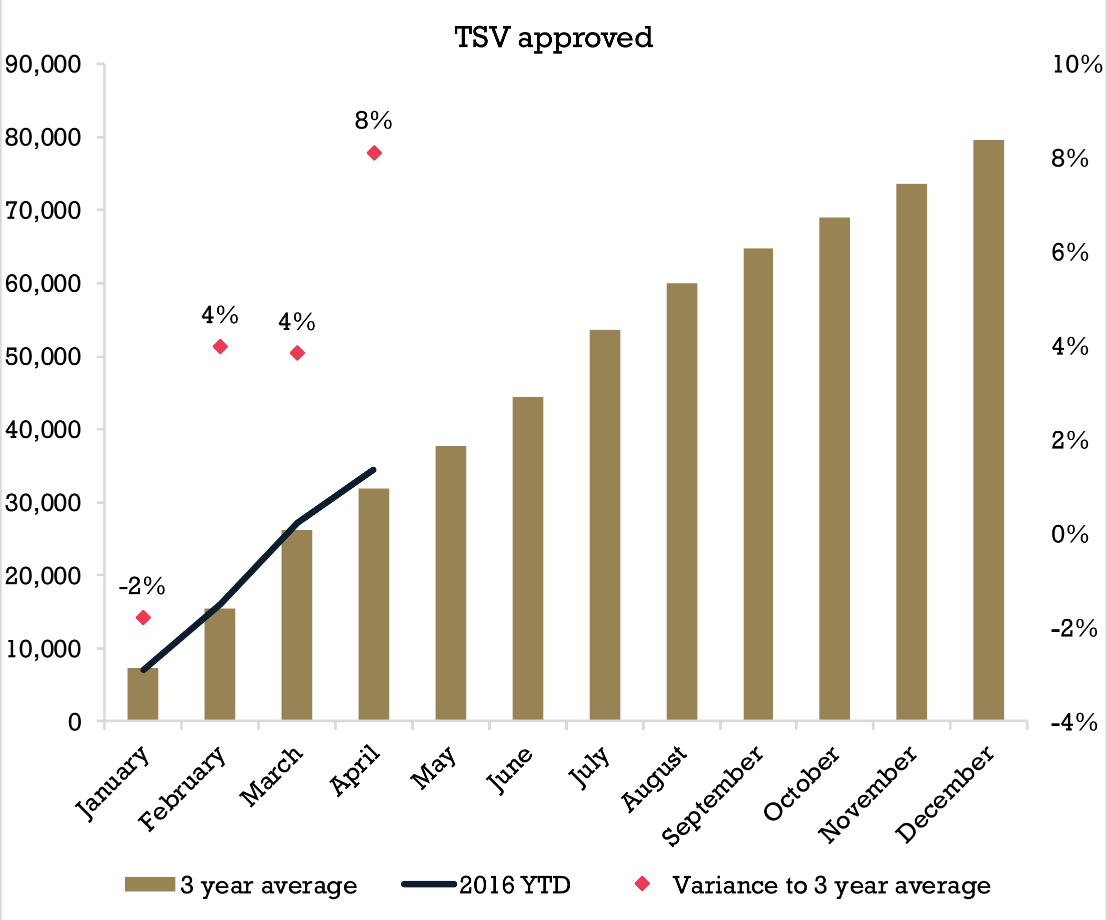
1. 2016 started off with decreases in January and February compared to the previous year, for both total student visas (TSV), (-12%, -4% respectively) and first time student visas (FSV), (-21%, -2% respectively). The drop in student visas has been driven by:
   - A decline in FSV (-7%, -939), with India and the Philippines making up 98% of this following the change in English language requirements (Rule 18) in 2015.
   - Early processing of visas in the USA (approved in late 2015).

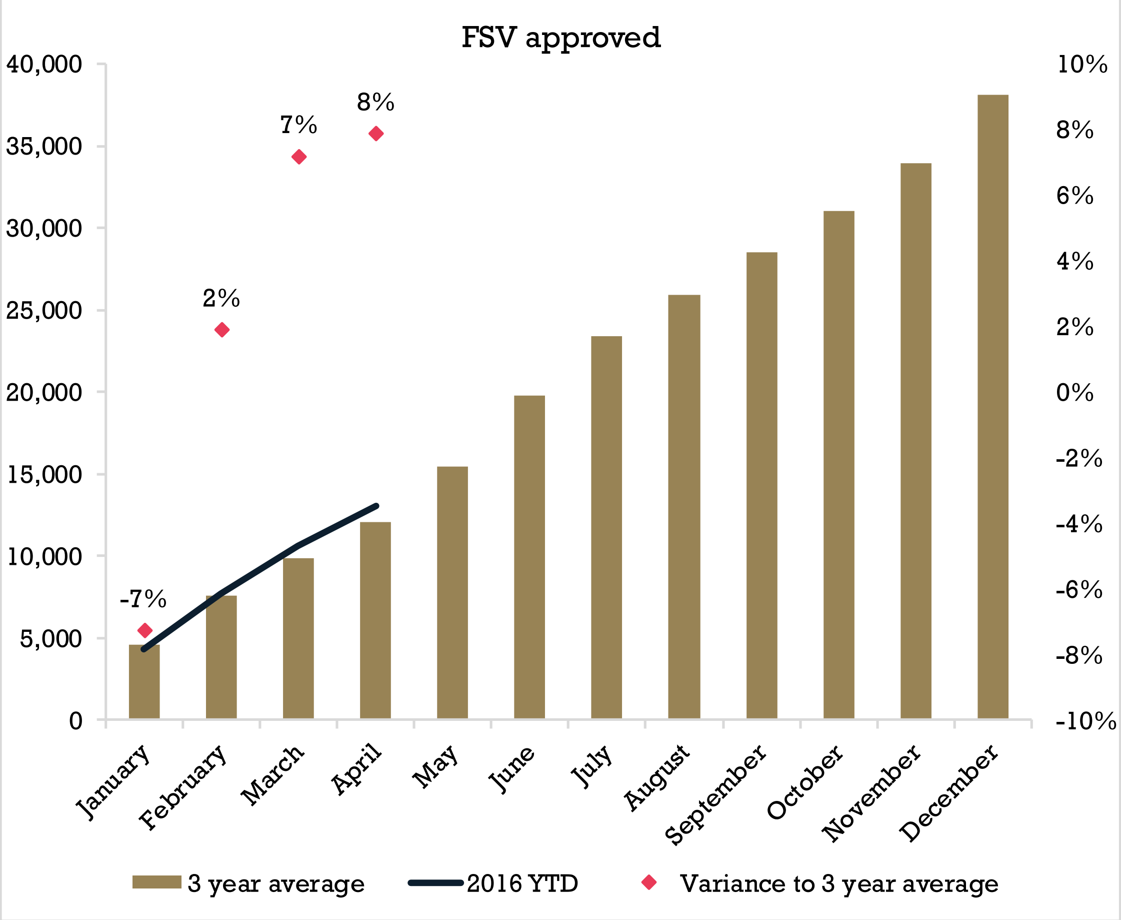
2. Current YTD figures show TSV down 3% and FSV down 7% suggesting that this initial decline is stabilising in March/April. March experienced an 11% increase for FSV (+282) and remained stable in April (+10) compared to the same months last year. TSV also increased in April (+11%, +731 visas approved).

3. Most regions have seen an increase in both TSV and FSV approved in April 2016, compared to April 2015. This includes 54 FSV in Otago (+52%), 41 in Bay of Plenty (+77%) and 17 in Hawke's Bay (+89%).

4. There was a 24% decline in FSV approved for China in April 2016 (-152) compared to April 2015. Further analysis shows this is likely to be due to visas being applied for/approved earlier, as March 2016 saw a 23% increase in FSV (+115) compared to March 2015. These variances mainly affected the university sector in Waikato. China also experienced the largest growth in TSV in April, suggesting students are applying for visas in order to extend their study in NZ.

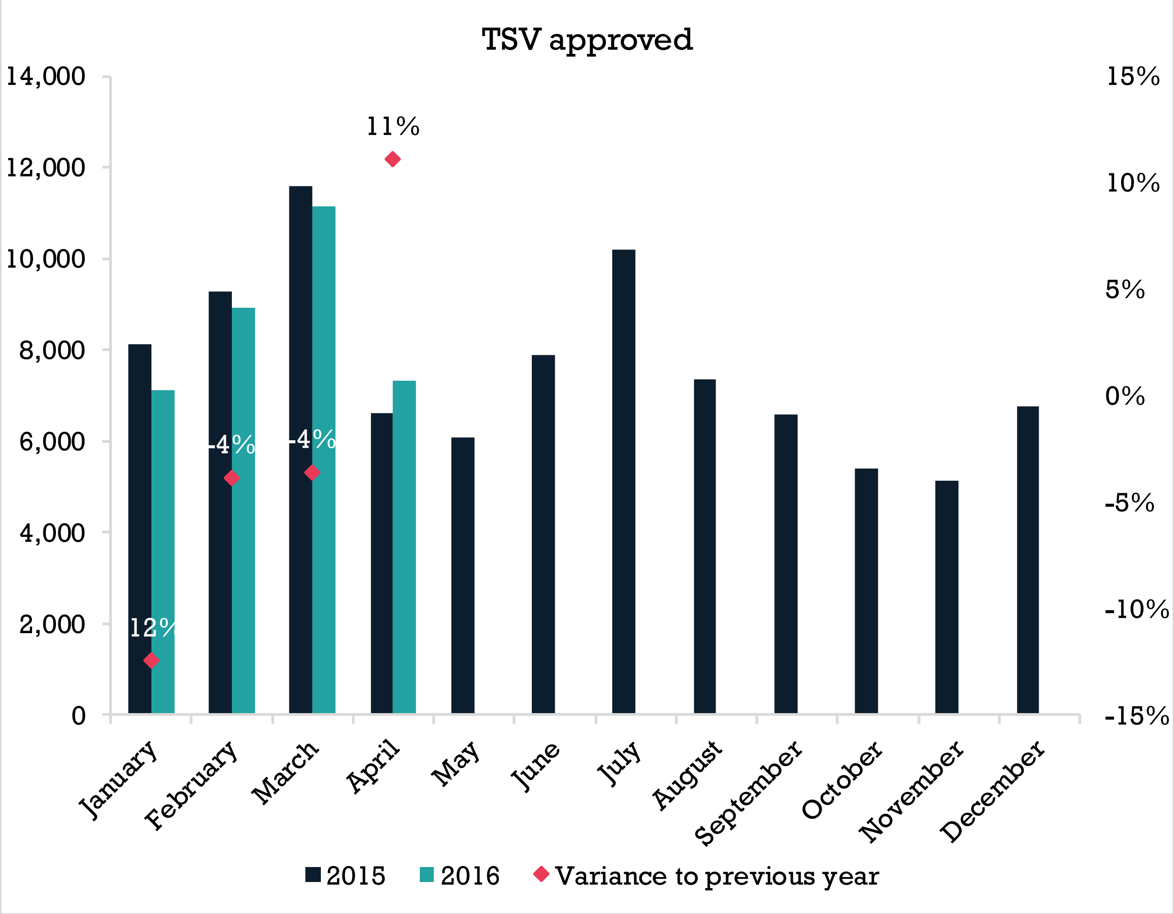
Comparison to 3 year average (Year-to-Date)

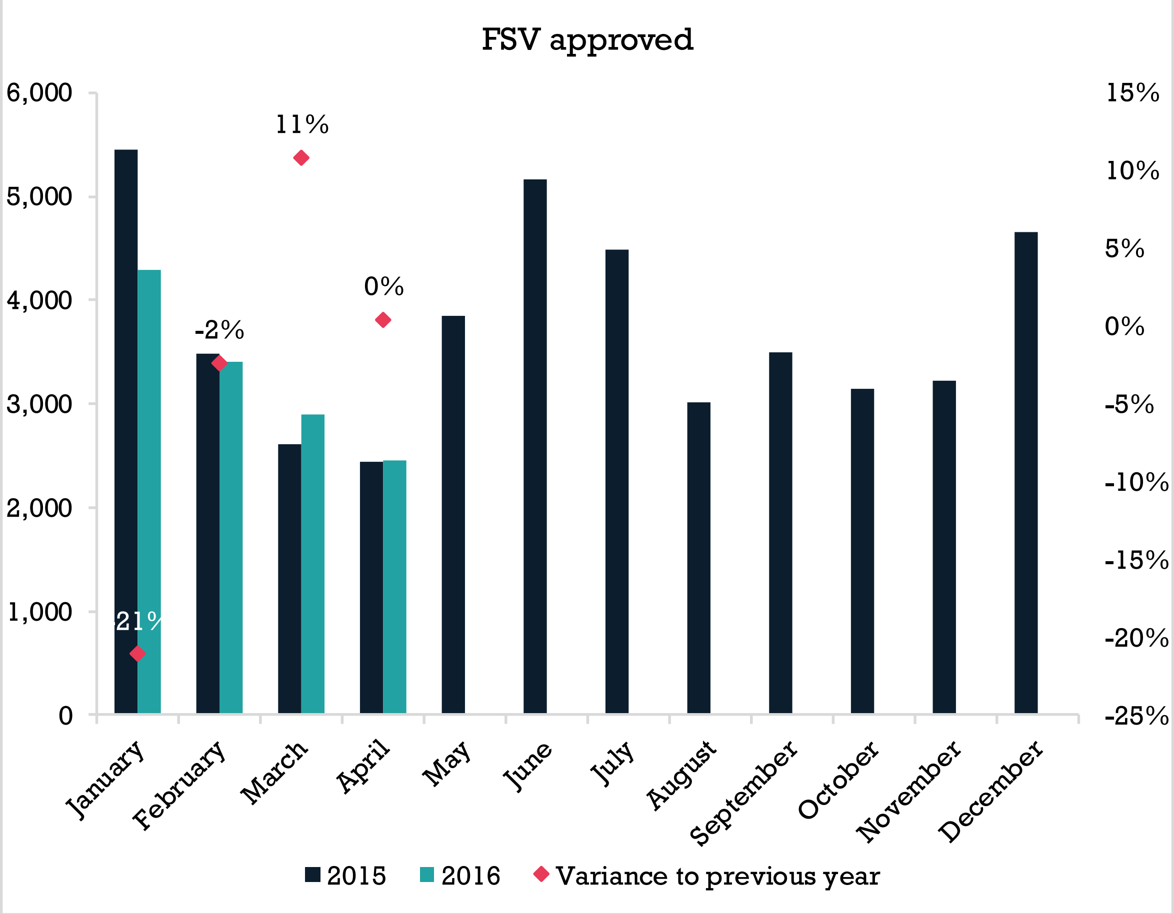




- These charts show us how student visas (both total and first time) are tracking year-to-date, compared to the three year average (an average of 2013, 2014 and 2015). The variance looks at where we are this year, compared to the three year average. For example, the three year average for April is the average of Jan-Apr 2013, Jan-Apr 2014 and Jan – Apr 2015.
- 2016 YTD student visa data is in line with the 3 year average, with 34,538 TSV approved compared to a yearly average of 31,944 (+8%). The approval rate for TSV remained relatively stable YTD (89%), compared to 2015 YTD (88%).
- FSV are also up 8% compared to the 3 year average, with 13,041 visas approved compared to 12,090.

Month-on-Month comparison





- These charts show us how student visas (both total and first time) are tracking monthly compared to the same month last year.
- 2016 started off with declines in both TSV (-12%) and FSV (-21%) for January, driven by early processing of visas in the USA (approved in late 2015) and the change in English language requirements (Rule 18) in 2015.
- This decline appears to be stabilising, with March experiencing an 11% increase for FSV (+282) and remaining stable in April (+10) compared to the same months last year.
- TSV increased in April (+11%, +731 visas approved).

Overall market performance (Year-to-Date)

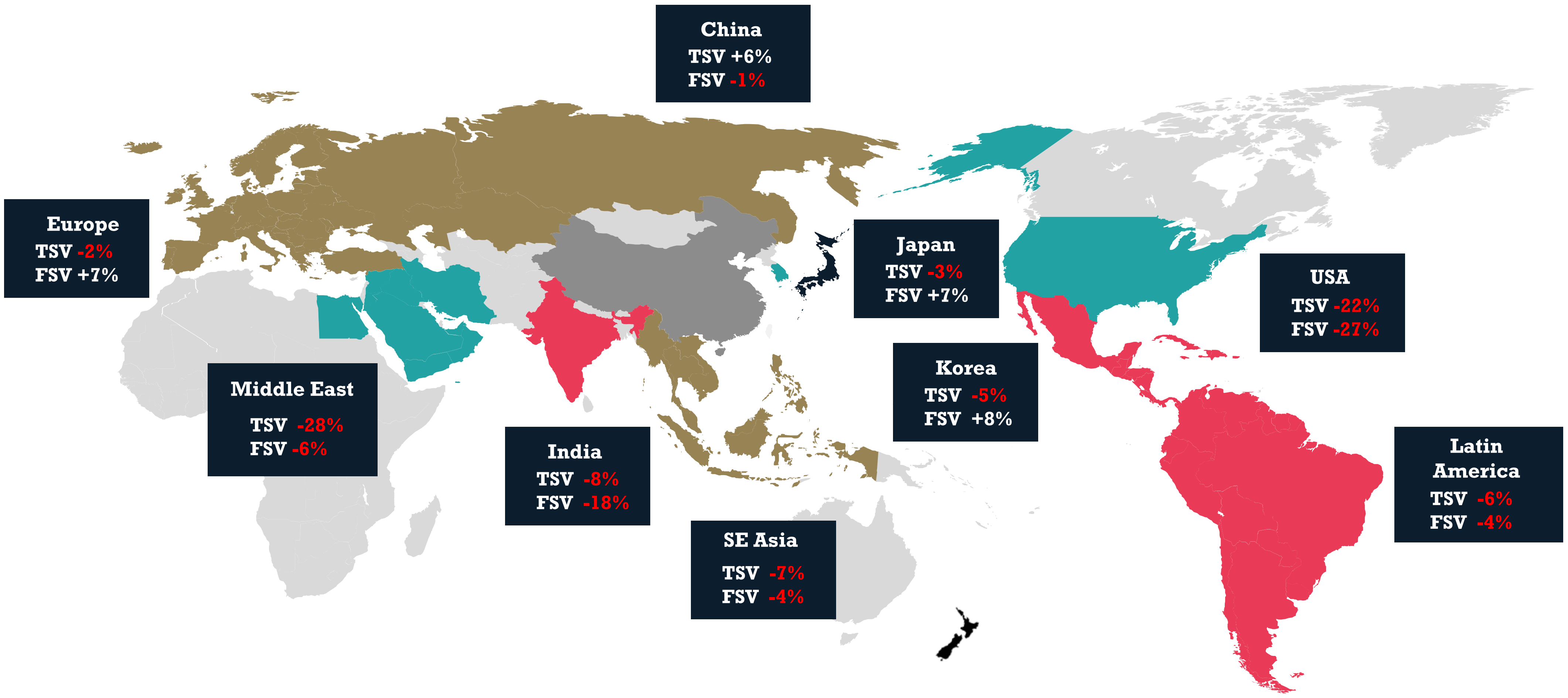
Top 20 markets (in order of 2016 volume)

Indicator	TSV	2015 YTD	2016 YTD	Change in numbers	% change
↑	China	12,352	13,036	684	6%
↓	India	6,863	6,307	-556	-8%
↓	Korea	2,272	2,169	-103	-5%
→	Japan	1,555	1,505	-50	-3%
↓	Thailand	1,247	1,093	-154	-12%
↓	USA	1,100	861	-239	-22%
→	Malaysia	789	792	3	0%
→	Vietnam	678	698	20	3%
↓	Brazil	713	628	-85	-12%
↓	Hong Kong	616	588	-28	-5%
↓	Saudi Arabia	936	587	-349	-37%
↓	Philippines	668	489	-179	-27%
→	Germany	384	392	8	2%
↓	Taiwan	430	379	-51	-12%
↓	Fiji	402	348	-54	-13%
→	Sri Lanka	312	305	-7	-2%
↓	Colombia	342	296	-46	-13%
→	Indonesia	285	295	10	4%
↑	Nepal	158	246	88	56%
↓	Russia	247	221	-26	-11%
→	**Grand Total**	**35,594**	**34,538**	**- 1,056**	**-3%**

Indicator	FSV	2015 YTD	2016 YTD	Change in numbers	% change
↓	India	4,153	3,416	-737	-18%
→	China	2,378	2,364	-14	-1%
↑	Japan	783	840	57	7%
↑	Korea	698	754	56	8%
↓	USA	942	688	-254	-27%
↓	Brazil	585	525	-60	-10%
↓	Thailand	459	402	-57	-12%
↓	Philippines	560	377	-183	-33%
↑	Germany	289	310	21	7%
↑	Malaysia	184	263	79	43%
↓	Colombia	272	233	-39	-14%
↑	Vietnam	146	174	28	19%
↑	Fiji	142	155	13	9%
↑	Sri Lanka	130	149	19	15%
↑	Chile	124	137	13	10%
↓	Great Britain	170	134	-36	-21%
↑	Nepal	80	131	51	64%
↑	France	95	116	21	22%
↑	Indonesia	97	111	14	14%
↑	Argentina	52	99	47	90%
↓	**Grand Total**	**13,980**	**13,041**	**- 939**	**-7%**

- This table shows the changes by top 20 markets for both total and first time visas. It compares 2016 YTD with 2015 YTD.
- Overall TSV are down 3% (-1,056) YTD however this decline has slowed, with April seeing an increase in TSV (see slide 5).
- The decline is being driven by FSV (-7%, -939) with India and the Philippines making up 98% of this, following the change in English language requirements (Rule 18) in 2015.

Market overview (Year-to-Date)



- This image shows the changes by priority markets for both total and first time visas. It compares 2016 YTD with 2015 YTD.
- Most markets have seen a decline YTD in both TSV and FSV with the exception of increases in first time students from Korea, Japan and Europe. The growth in TSV from China (+6%) is being driven by returning students (see next page).

Note: The colours of the markets do not have any significance

Market overview (Month-on-Month)

- These tables show the largest increases and decreases by markets for both total and first time visas in April 2016 compared to April 2015.
- FSV remain stable in April 2016, with the increases seen from Korea, India, Vietnam, USA and Thailand being offset by declines from China (-152) and the Philippines (-51).
- FSV from China declined in April, but did increase in March 2016 compared to March 2015. This market also experienced the largest growth in TSV, suggesting students are applying for visas in order to extend their study in NZ.

TSV

Markets	Change	% change
China	277	13%
India	169	10%
Korea	125	33%
Thailand	54	35%
Vietnam	54	51%
Great Britain	-10	-16%
Sri Lanka	-14	-16%
Iran	-21	-38%
Philippines	-28	-19%
Saudi Arabia	-74	-30%

FSV

Markets	Change	% change
Korea	71	59%
India	46	8%
Vietnam	34	213%
USA	33	53%
Thailand	30	40%
Sri Lanka	-12	-36%
Chile	-14	-37%
Bangladesh	-16	-70%
Philippines	-51	-40%
China	-152	-24%

Overall regional performance (Year-to-Date)

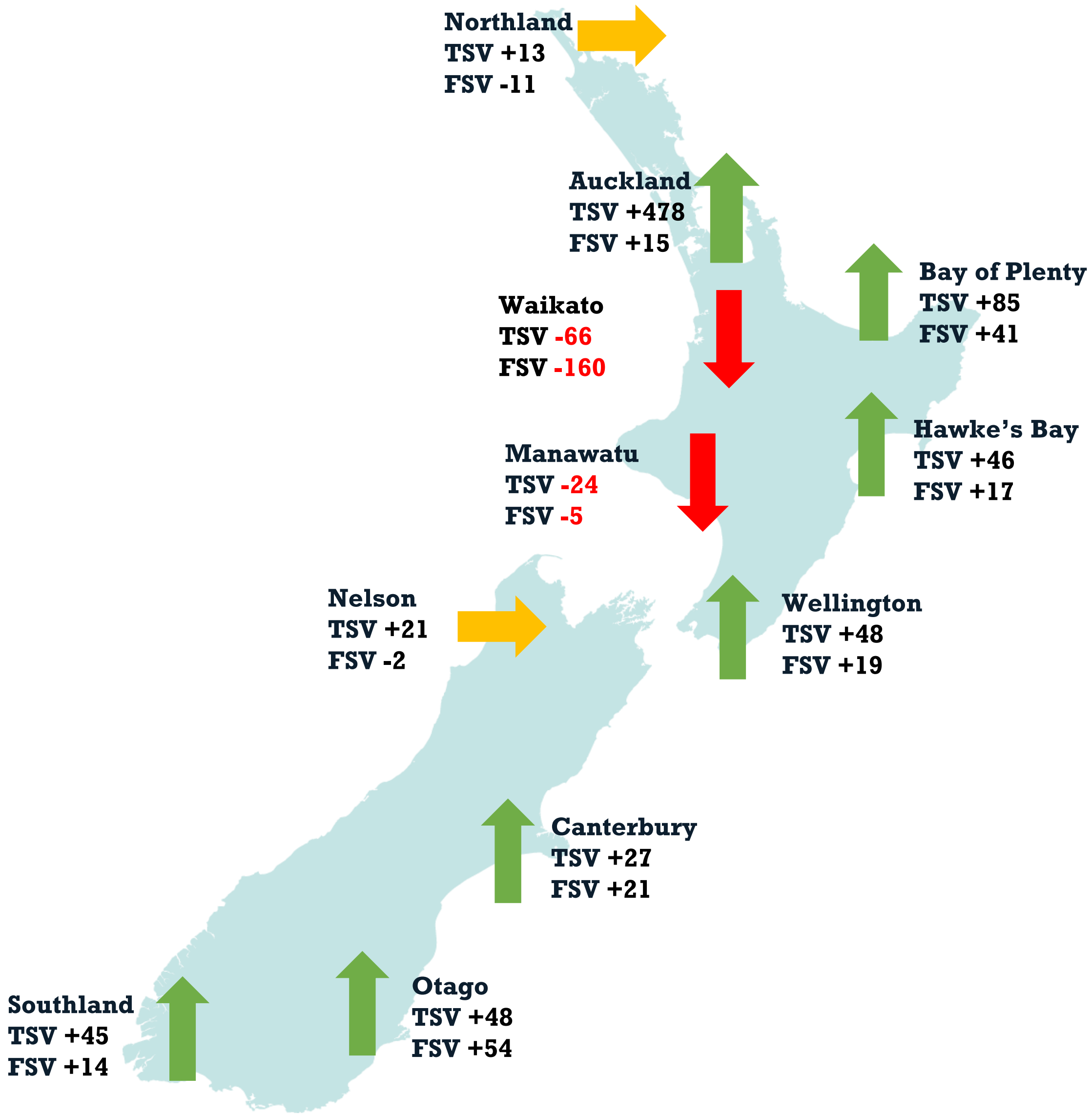
(Listed in order of 2016 volume)

Indicator	TSV	2015 YTD	2016 YTD	Change in numbers	% change
	Auckland	21,758	20,837	-921	-4%
	Canterbury	3,315	3,358	43	1%
	Waikato	2,542	2,441	-101	-4%
	Wellington	2,345	2,379	34	1%
	Otago	2,084	2,017	-67	-3%
	Manawatu	1,232	1,020	-212	-17%
	Bay of Plenty	722	777	55	8%
	Hawke's Bay	301	378	77	26%
	Southland	348	371	23	7%
	Nelson	327	363	36	11%
	Taranaki	247	242	-5	-2%
	Other	178	172	-6	-3%
	Northland	166	163	-3	-2%
	Gisborne	21	16	-5	-24%
	West Coast	5	4	-1	-20%
	Grand Total	**35,594**	**34,538**	**- 1,056**	**-3%**

Indicator	FSV	2015 YTD	2016 YTD	Change in numbers	% change
	Auckland	8,370	7,502	-868	-10%
	Canterbury	1,316	1,347	31	2%
	Waikato	990	924	-66	-7%
	Wellington	949	900	-49	-5%
	Otago	762	751	-11	-1%
	Bay of Plenty	347	400	53	15%
	Manawatu	447	379	-68	-15%
	Hawke's Bay	151	217	66	44%
	Nelson	183	171	-12	-7%
	Southland	170	170	0	0%
	Other	139	129	-10	-7%
	Taranaki	70	74	4	6%
	Northland	74	68	-6	-8%
	Gisborne	7	7	0	0%
	West Coast	3	2	-1	-33%
	Grand Total	**13,980**	**13,041**	**- 939**	**-7%**

- This table shows the changes by NZ region for both total and first time visas. It compares 2016 YTD with 2015 YTD.
- Auckland has experienced a decline in both TSV and FSV YTD, while Canterbury remains stable. Waikato and Wellington saw a decrease in FSV YTD (-66,-49 respectively), while Hawke’s Bay and Bay of Plenty both saw growth in FSV (+66,+53 respectively).

Regional overview (Month-on-Month)



- This image shows the changes in volume by region for both total and first time visas in April 2016, compared to April 2015.

- Most regions saw an increase in both TSV and FSV approved in April 2016, compared to April 2015. This includes 54 FSV in Otago (+52%), 41 in Bay of Plenty (+77%) and 17 in Hawke's Bay (+89%).

- A significant decline in FSV approved for Waikato was seen in April 2016 (-160,-53%). Further analysis shows this was driven by China, with 173 visas approved in April 2015, and only 32 in April 2016 - an 82% decline. However, Waikato saw a 98% increase in FSV approved in March (+127) suggesting visas have been applied for/processed earlier.

Sector overview (Year-to-Date)

Primary	Intermediate	Secondary	ITP	PTE	University
TSV -16%	TSV +10%	TSV +1%	TSV +3%	TSV -8%	TSV -2%
FSV -26%	FSV +19%	FSV -2%	FSV +4%	FSV -13%	FSV -6%

- This visual shows the changes by sector for both total and first time visas. It compares 2016 YTD with 2015 YTD.
- The primary school sector has experienced the largest decline in TSV YTD, down 16% (-32). This is being driven by the decline in FSV approvals (-26%, -28).
- The intermediate school sector has experience the largest growth YTD, with an additional 21 TSV approved, compared to the same period last year. Again, this is being driven by FSV (+19%, +17).

Sector overview (Month-on-month)

- These tables show the changes by sector for both total and first time visas in April 2016 compared to April 2015.

- A large increase in TSV approved for the secondary school sector was evident in April, up 489 (+56%) compared to last April. This includes 62 FSV (+16%). Similarly, Information Technology Polytechnics (ITPs) saw a significant growth of 211 TSV approved (+27%), including 46 FSV (+16%).

- The university sector decline is being driven by a reduction in FSV approved for Chinese students studying at universities in Waikato this April compared to April 2015 (-149, -93%). However, as mentioned previously, FSV for the university sector were up in March 2016 compared to March 2015 (+36%, +115).

TSV

Sectors	Change	% change
Secondary	489	56%
ITPs	211	27%
PTEs	89	3%
Intermediate	25	53%
Primary	6	14%
Universities	-83	-5%

FSV

Sectors	Change	% change
Secondary	62	16%
ITPs	46	16%
PTEs	24	2%
Intermediate	16	73%
Primary	3	14%
Universities	-131	-25%

Trends by market

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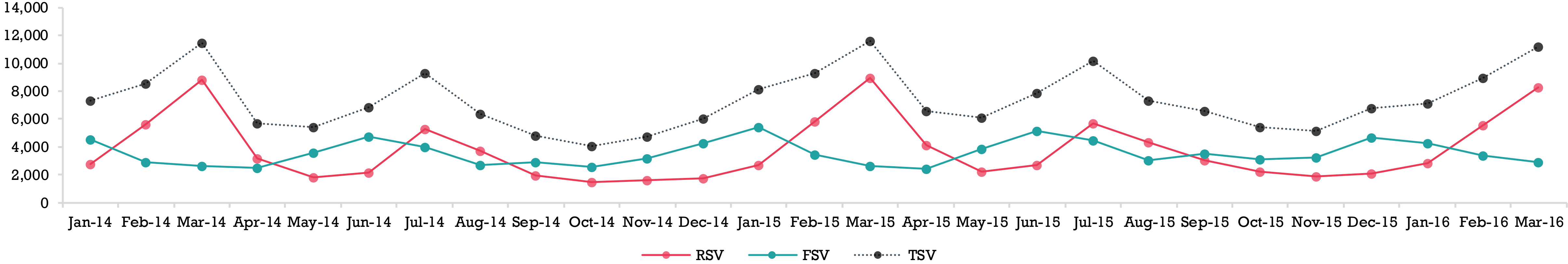
Overall:

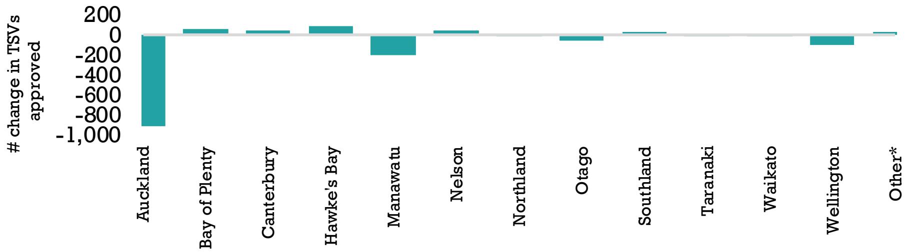
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
721 17%	10 0%	731 11%	-117 -1%	-939 -7%	-1,056 -3%

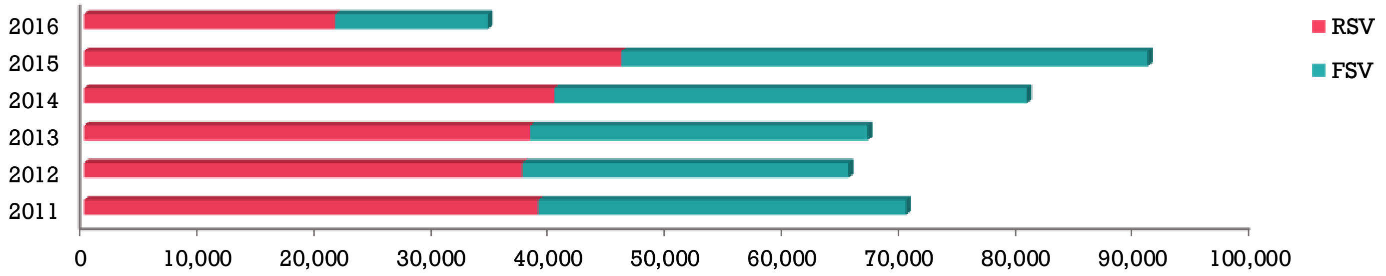
Overall: student visas approved 2014-2016



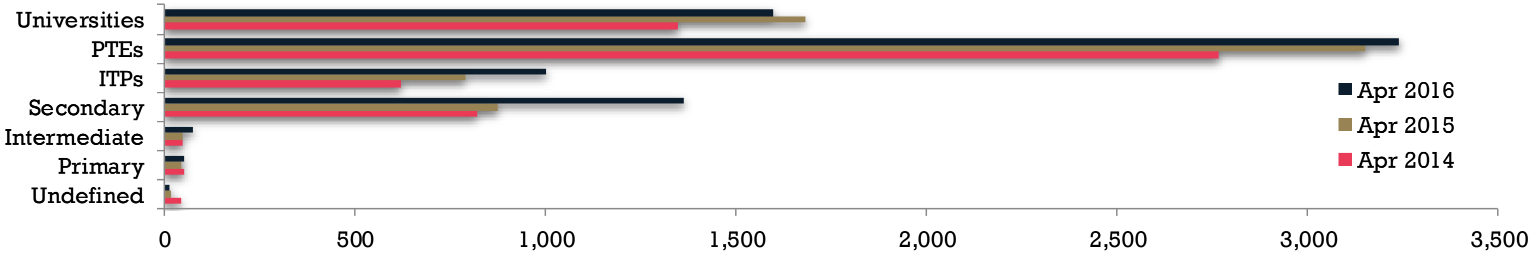
Overall: 2016 YTD TSV regional change



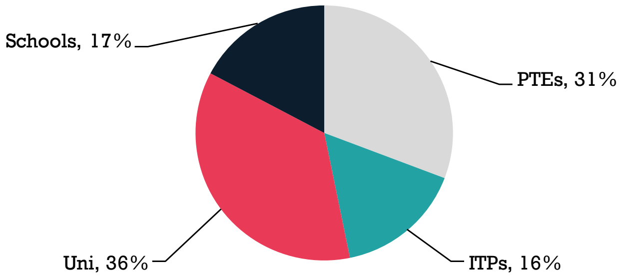
Overall: Cumulative total for RSV vs. FSV, 2011-2016



Overall: Total student visas approved by sector, April



Overall: 2016 YTD Sector breakdown of TSV



Key takeaways:

2016 started off with decreases in January and February compared to the previous year, for both total student visas (-12%, -4% respectively) and first time student visas (-21%, -2% respectively). The drop in student visas has been driven by:

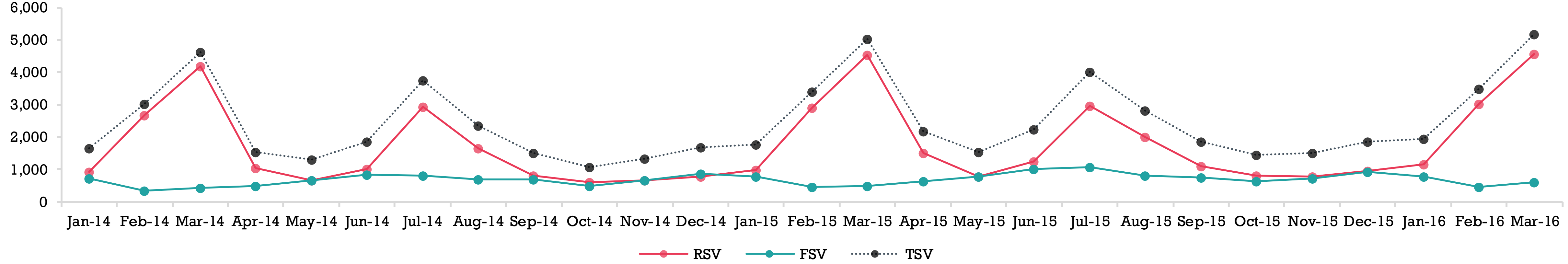
- A decline in FSV (-7%, -939) with India and the Philippines making up 98% of this, following the change in English language requirements (Rule 18) in 2015.
- Early processing of visas in the USA (approved in late 2015).

China:

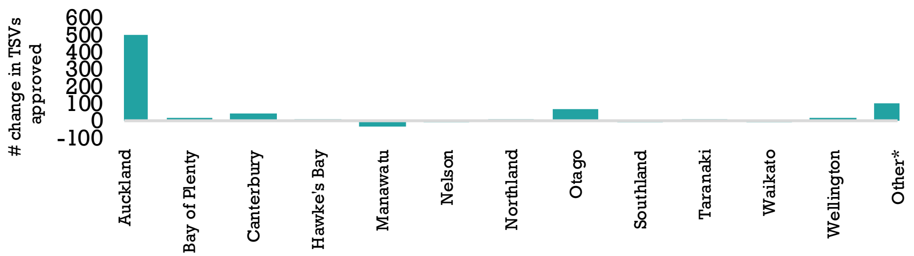
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
429 ⇧ 28%	-152 ⇩ -24%	277 ⇧ 13%	698 ⇧ 7%	-14 ⇨ -1%	684 ⇧ 6%

China: student visas approved 2014-2016

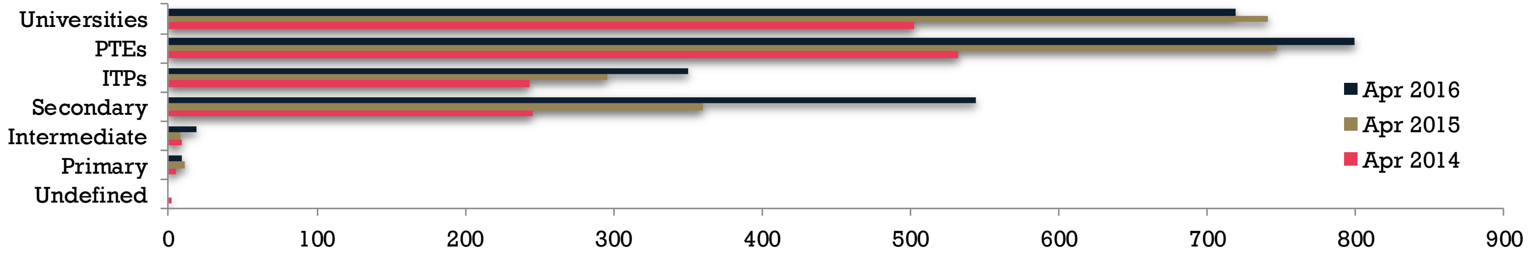


China: 2016 YTD TSV regional change

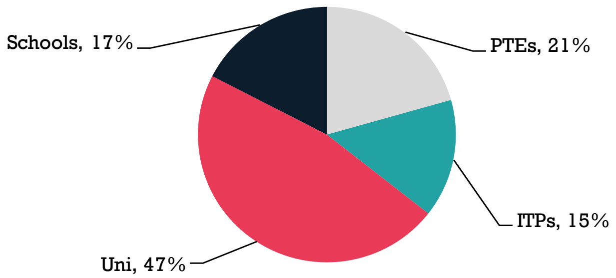


China: Cumulative total for RSV vs. FSV, 2011-2016

China: Total student visas approved by sector, April



China: 2016 YTD Sector breakdown of TSV



Key takeaways:

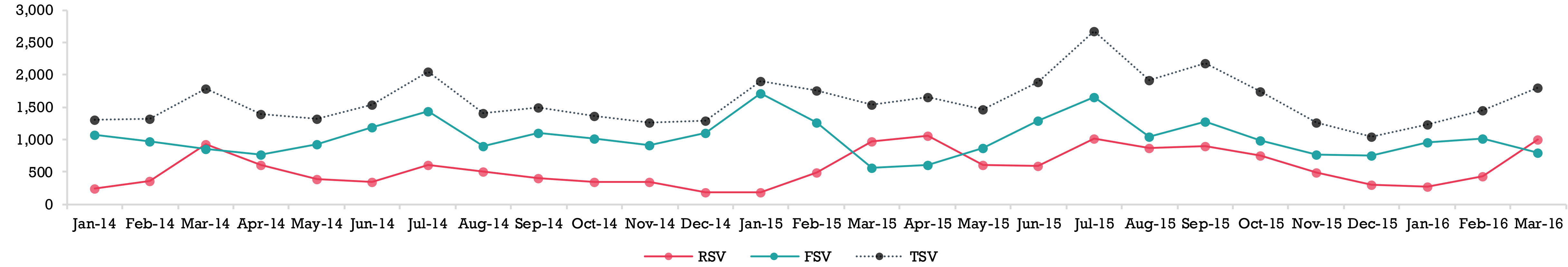
- FSV from China declined 24% in April 2016 (-152) compared to April 2015. This is resulted in the YTD figure stabilising at -1%, compared to +8% for Jan-Mar 2016.
- Further analysis shows this is likely to be due to visas being applied for/approved earlier, as March 2016 saw a 23% increase in FSV (+115) compared to March 2015. These variances mainly affected the university sector in Waikato. China also experienced the largest growth in TSV in April, suggesting students are applying for visas in order to extend their study in NZ.

India:

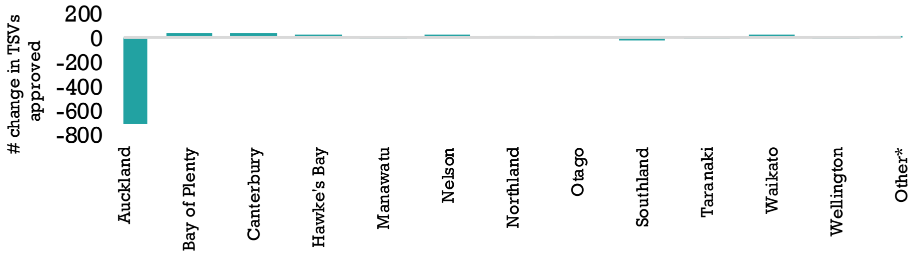
April RSV		April FSV		April TSV		YTD RSV		YTD FSV		YTD TSV	
123 ↑	12%	46 ↑	8%	169 ↑	10%	181 ↑	7%	-737 ↓	-18%	-556 ↓	-8%

YTD (April)

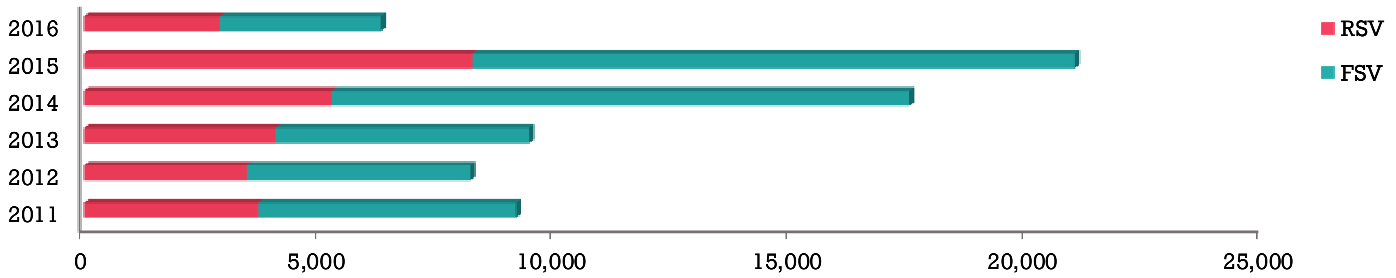
India: student visas approved 2014-2016



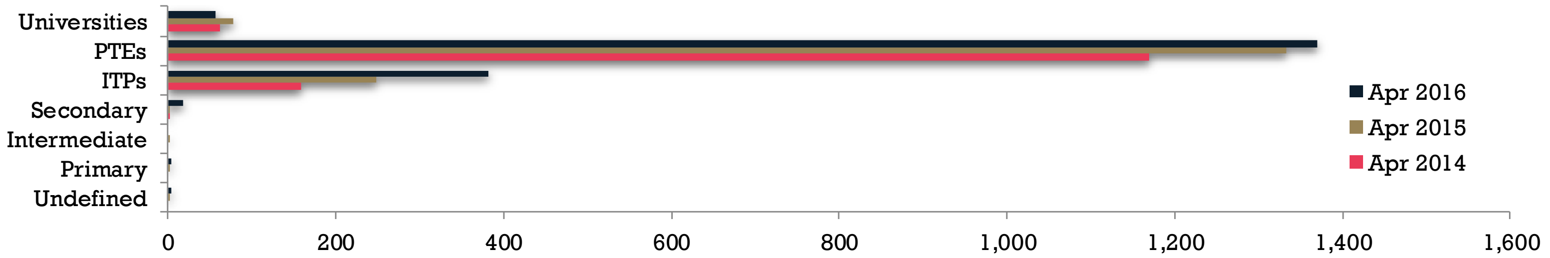
India: 2016 YTD TSV regional change



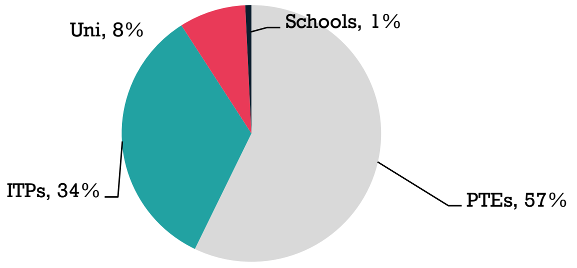
India: Cumulative total for RSV vs. FSV, 2011-2016



India: Total student visas approved by sector, April



India: 2016 YTD Sector breakdown of TSV



Key takeaways:

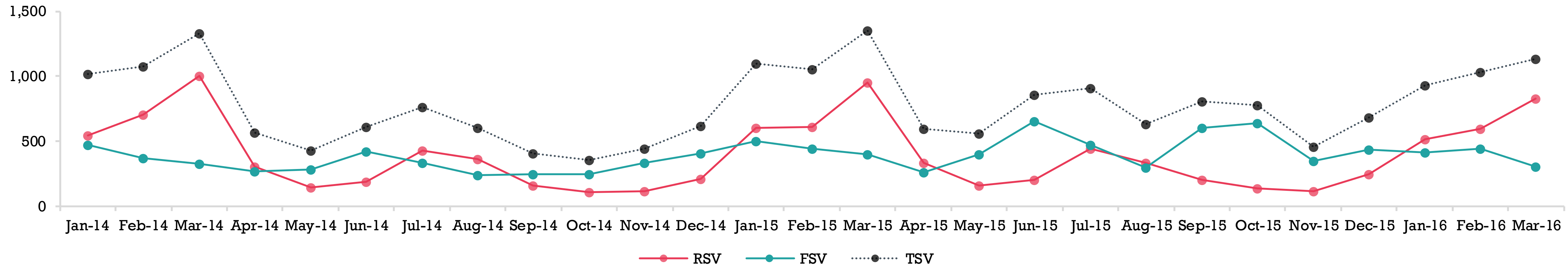
- Overall results for April 2016 were positive for India with both FSV and TSV up compared to April 2015 (+8%, +10%). YTD results however continue to be much lower than the same period last year, driven by an 18% decline in FSV, following the change in English language requirements (Rule 18) in 2015.
- The increases in April 2016 have positively impacted Private Training Establishments (PTEs) and ITPs.

South East Asia:

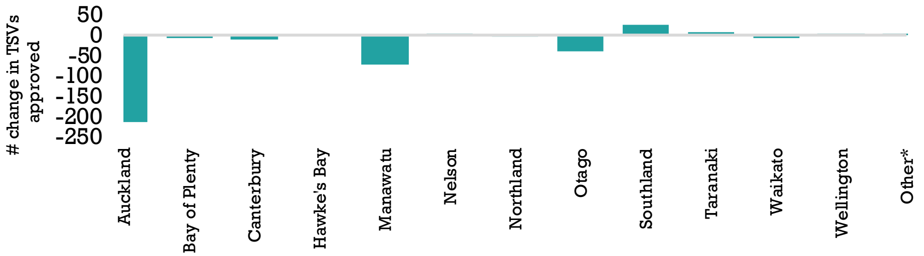
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
54 ↑ 16%	28 ↑ 11%	82 ↑ 14%	-174 ↓ -7%	-153 ↓ -10%	-327 ↓ -8%

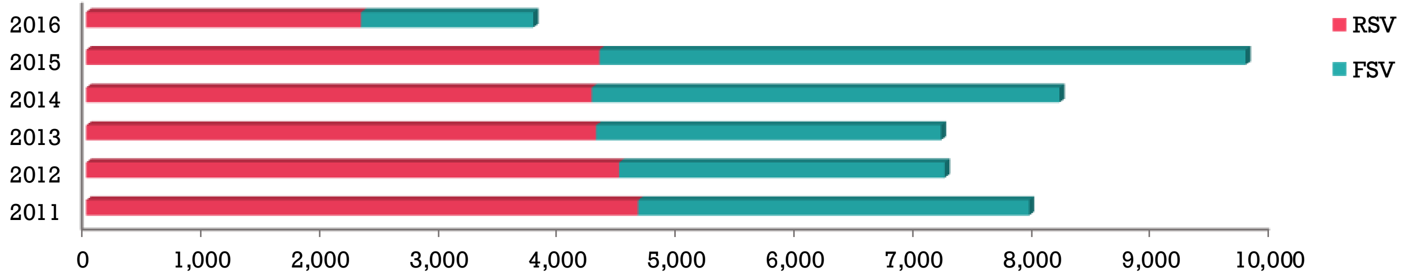
South East Asia: student visas approved 2014-2016



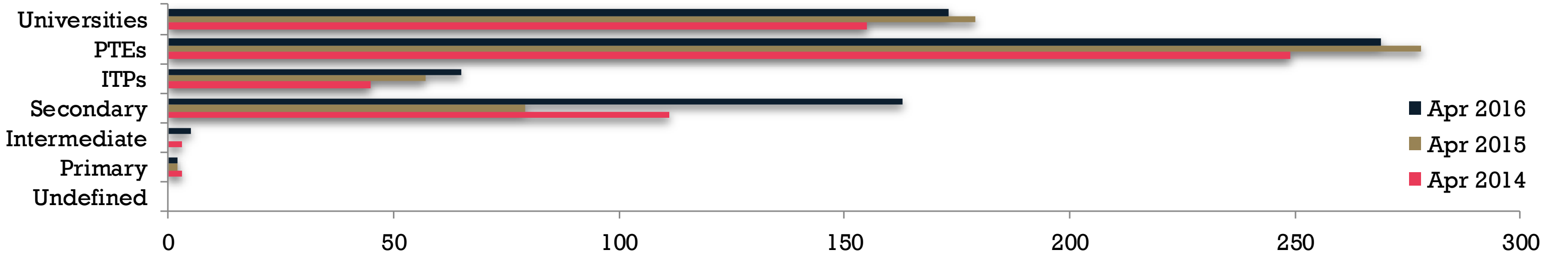
South East Asia: 2016 YTD TSV regional change



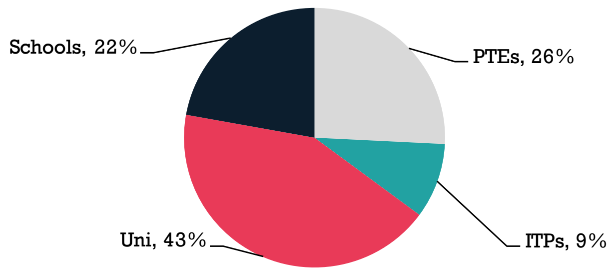
South East Asia: Cumulative total for RSV vs. FSV, 2011-2016



South East Asia: Total student visas approved by sector, April



South East Asia: 2016 YTD Sector breakdown of TSV



Key takeaways:

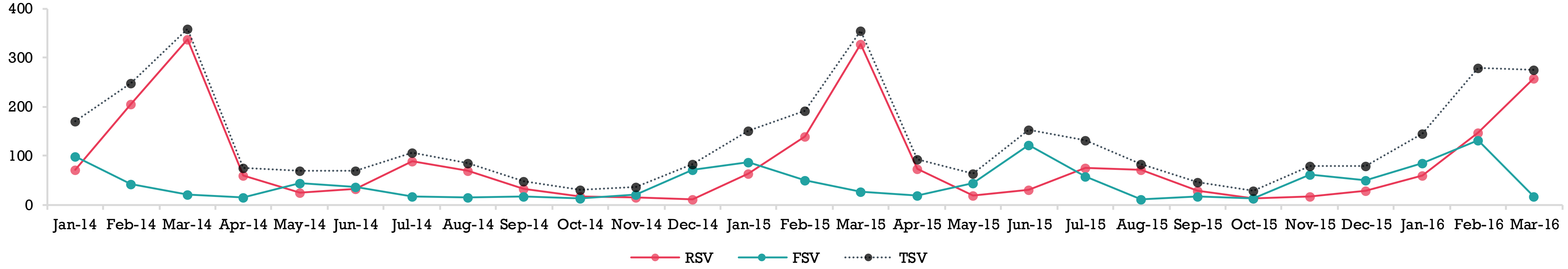
- The South East Asia region saw positive results in April, however YTD figures remain down compared to the same period last year: TSV (-7%, -430), FSV (-4%, -97). The decline in TSV YTD is being driven by Thailand (-12%, -57) and Philippines (-33%, -183).
- So far this year, students from the South East Asia region are choosing to study within the university (34%), schools (30%) and PTE (28%) sectors.

Malaysia:

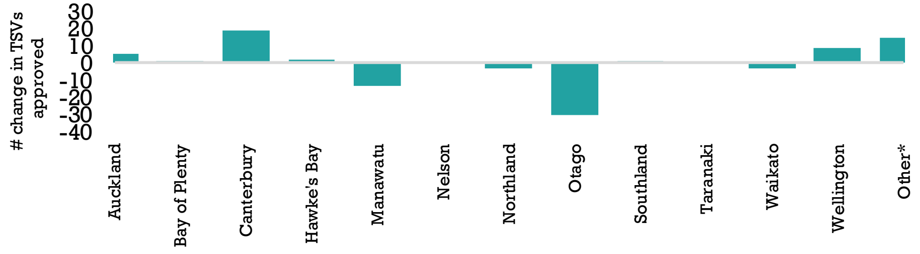
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
-9 ⇩ -12%	9 ⇧ 45%	0 ⇨ 0%	-76 ⇩ -13%	79 ⇧ 43%	3 ⇨ 0%

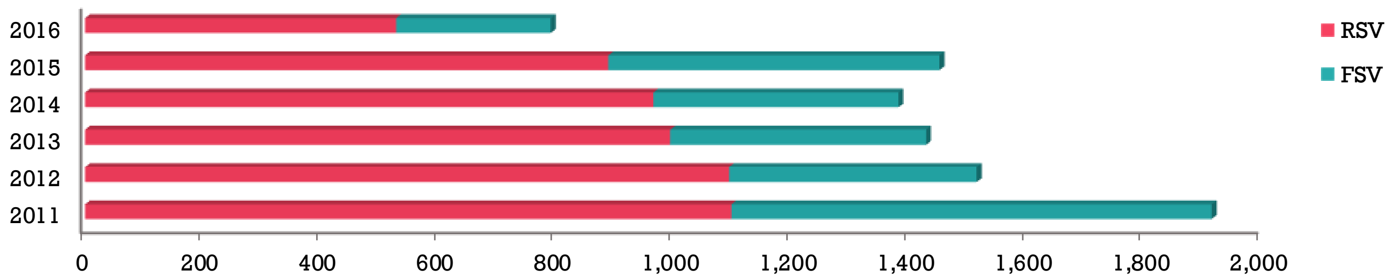
Malaysia: student visas approved 2014-2016



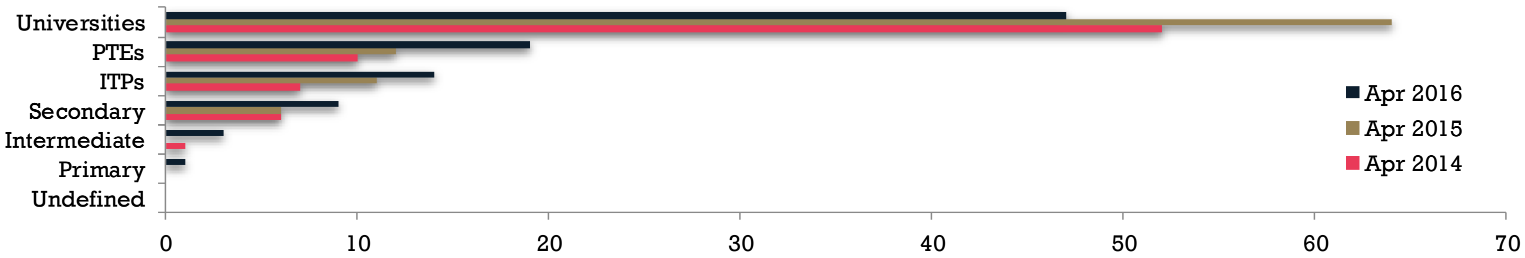
Malaysia: 2016 YTD TSV regional change



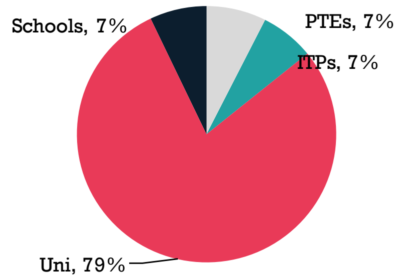
Malaysia: Cumulative total for RSV vs. FSV, 2011-2016



Malaysia: Total student visas approved by sector, April



Malaysia: 2016 YTD Sector breakdown of TSV



Key takeaways:

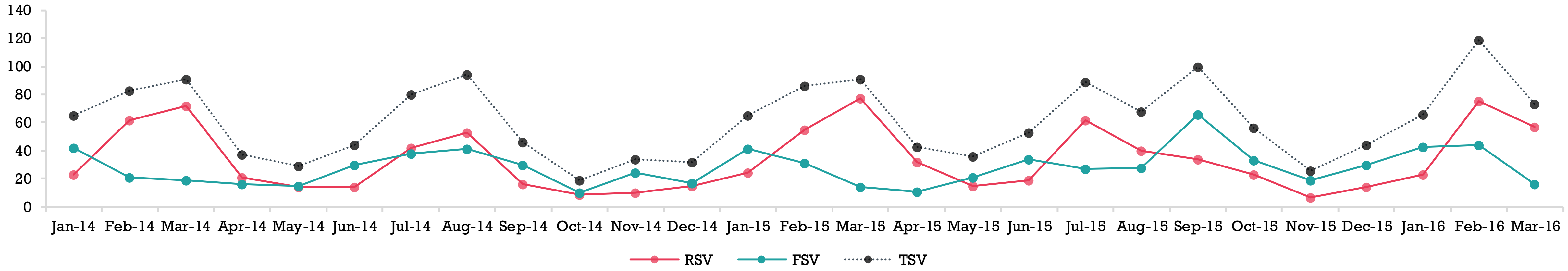
- TSV approved for Malaysia remains stable YTD. Although an increase was seen in FSV (+43%, +79), this was offset by a decline in RSV (-13%, -76).
- The university sector made up the majority of TSV approved YTD (79%).
- An increase was evident in the Canterbury region, while Otago saw a decline in Malaysian students YTD.

Indonesia:

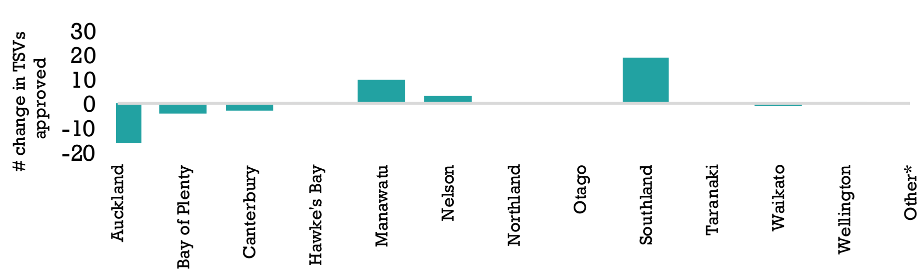
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
-3 -9%	-3 -27%	-6 -14%	-4 -2%	14 14%	10 4%

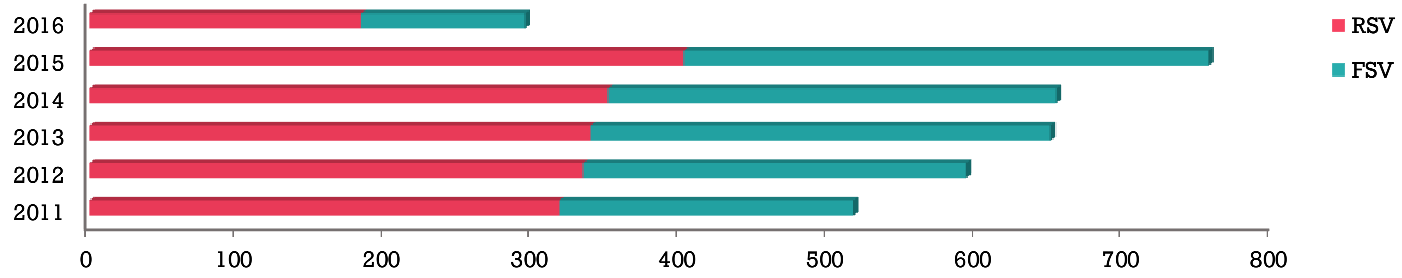
Indonesia: student visas approved 2014-2016



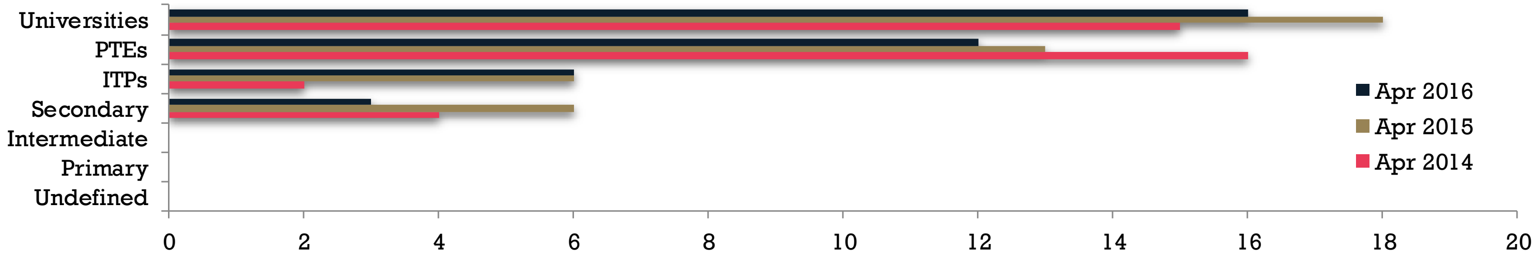
Indonesia: 2016 YTD TSV regional change



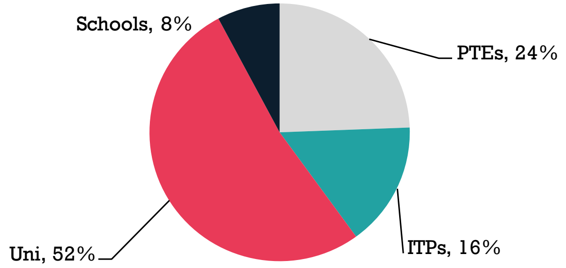
Indonesia: Cumulative total for RSV vs. FSV, 2011-2016



Indonesia: Total student visas approved by sector, April



Indonesia: 2016 YTD Sector breakdown of TSV



Key takeaways:

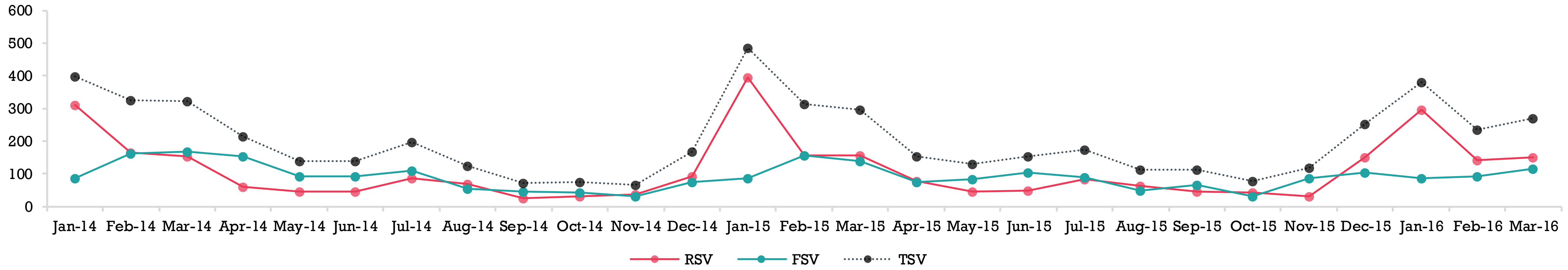
- The number of visas approved for Indonesian students in April 2016 was down compared to April 2015. However, results remain stable YTD compared to 2015 YTD, with TSV up 4% (+10) being driven by FSV (+14%, +14).
- The university sector made up 52% of TSV YTD, followed by the PTE sector with 24%. The increase in FSV YTD is evident in the Manawatu and Southland regions.

Thailand:

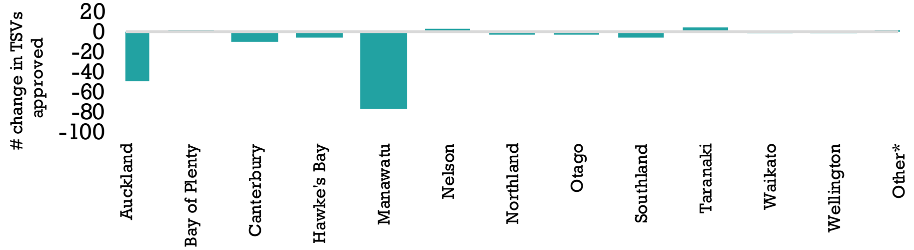
April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
24 ↑ 30%	30 ↑ 40%	54 ↑ 35%	-97 ↓ -12%	-57 ↓ -12%	-154 ↓ -12%

YTD (April)

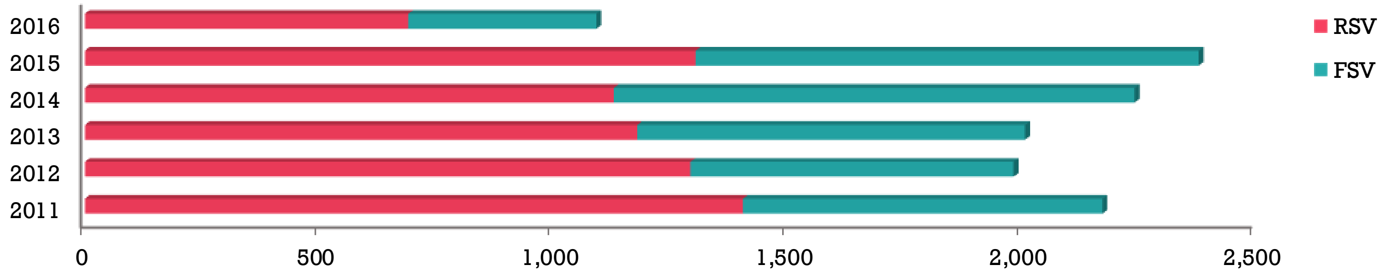
Thailand: student visas approved 2014-2016



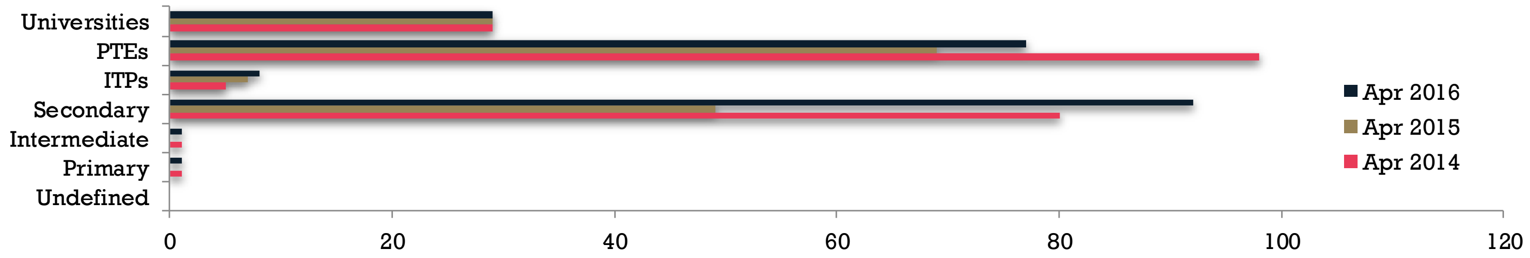
Thailand: 2016 YTD TSV regional change



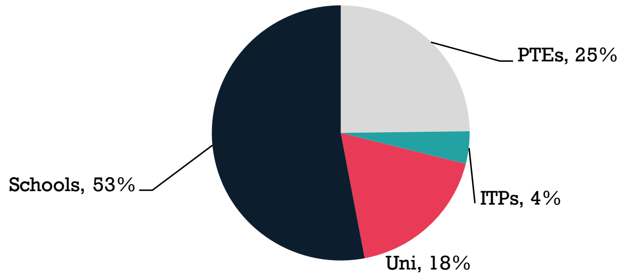
Thailand: Cumulative total for RSV vs. FSV, 2011-2016



Thailand: Total student visas approved by sector, April



Thailand: 2016 YTD Sector breakdown of TSV



Key takeaways:

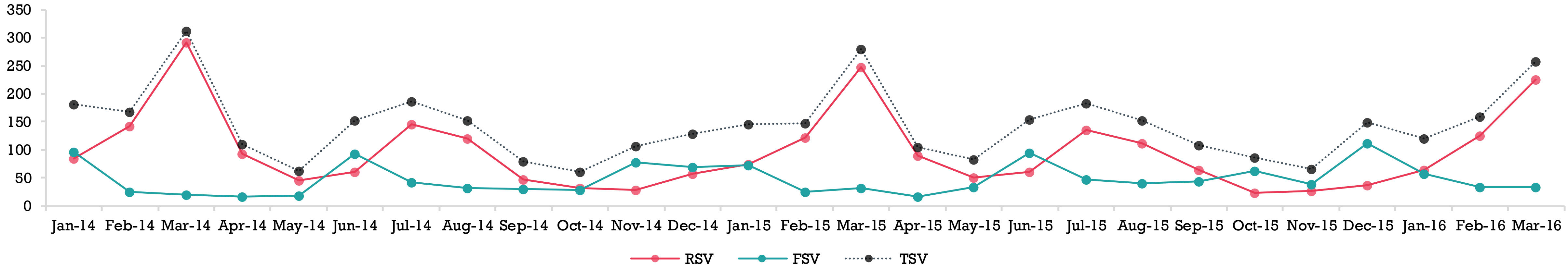
- April 2016 was a strong month for Thailand compared to April 2015 with TSV up 35% (+54). However YTD results continue to be lower than the same period last year (TSV down 12%, -154) being driven by a reduction in RSV and FSV.
- The schools sector make up the majority of TSV approved YTD (53%), followed by the PTE sector with 25%. The decrease in Thai students was felt in the Auckland and Manawatu regions.

Vietnam:

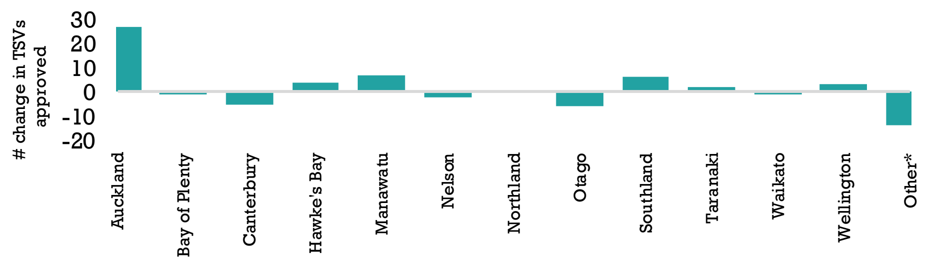
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
20 ↑ 22%	34 ↑ 213%	54 ↑ 51%	-8 ⇨ -2%	28 ↑ 19%	20 ⇨ 3%

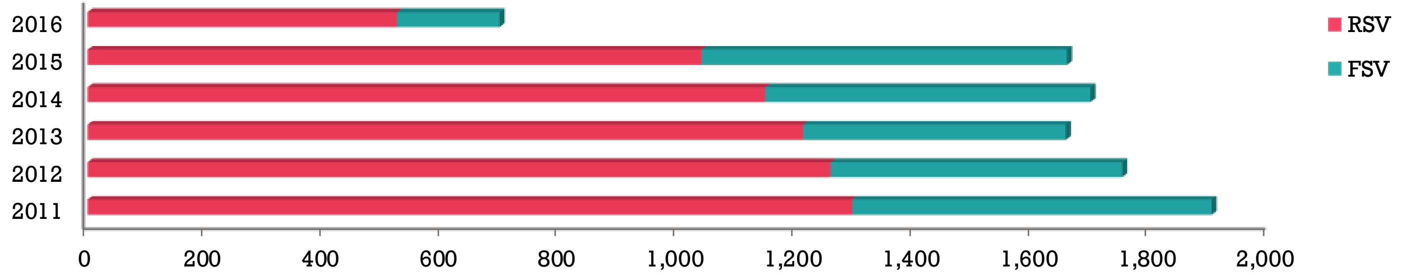
Vietnam: student visas approved 2014-2016



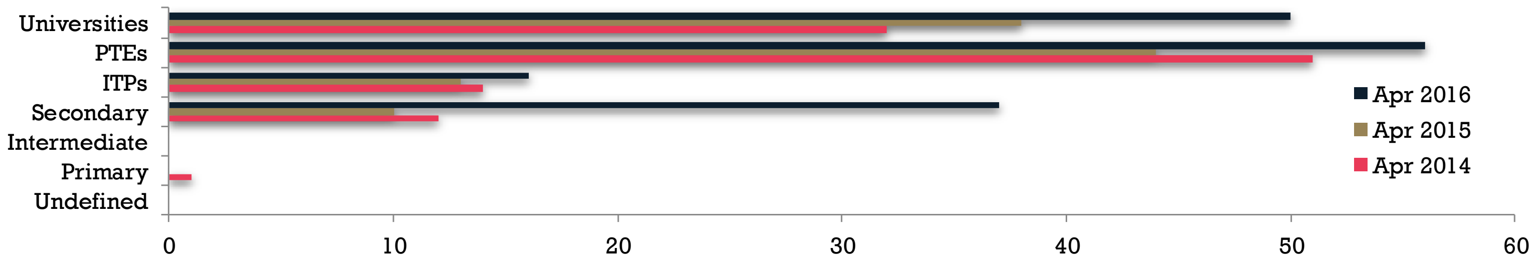
Vietnam: 2016 YTD TSV regional change



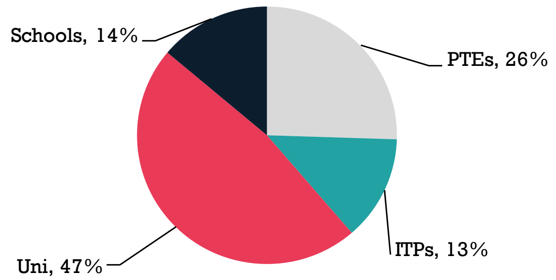
Vietnam: Cumulative total for RSV vs. FSV, 2011-2016



Vietnam: Total student visas approved by sector, April



Vietnam: 2016 YTD Sector breakdown of TSV



Key takeaways:

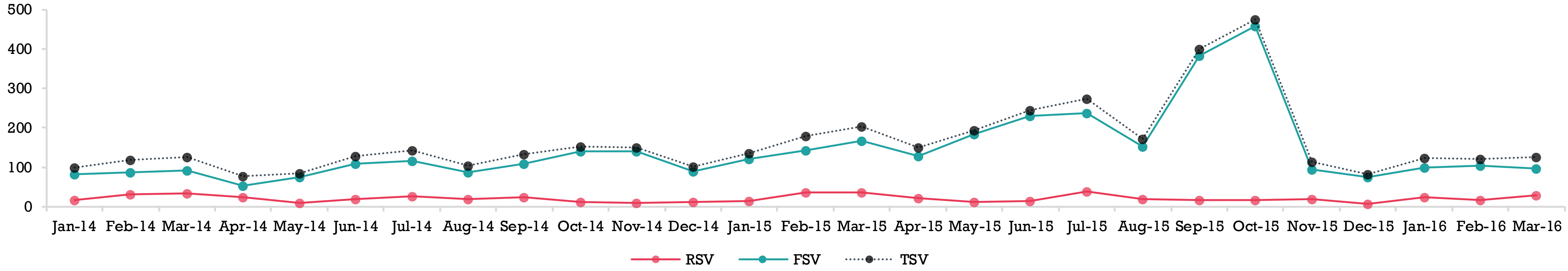
- Viet Nam is tracking well YTD with FSV up 19% (+19) and TSV remaining stable (+3%, +20). A very strong April saw an additional 24 FSV and 20 RSV approved compared to April 2015.
- 47% of TSV approved were in the university sector and 26% in the PTE sector. The increase in April impacted the secondary schools as well as the university, PTE and ITP sectors.

Philippines:

YTD (April)

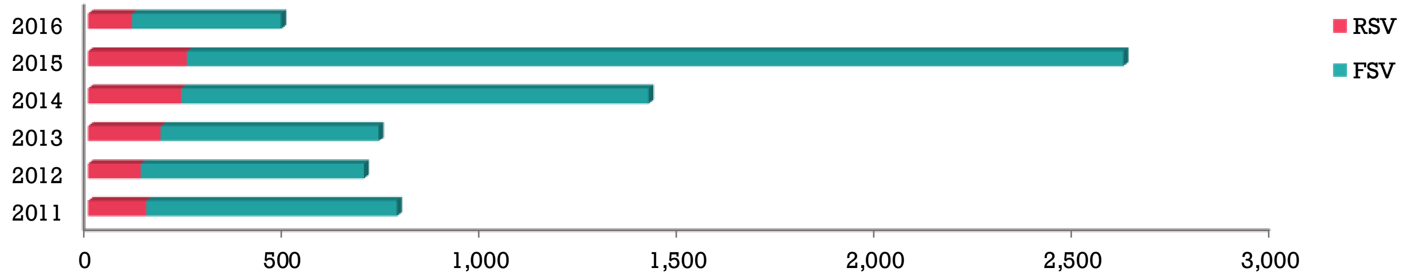
April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
23 ↑ 110%	-51 ↓ -40%	-28 ↓ -19%	4 → 4%	-183 ↓ -33%	-179 ↓ -27%

Philippines: student visas approved 2014-2016

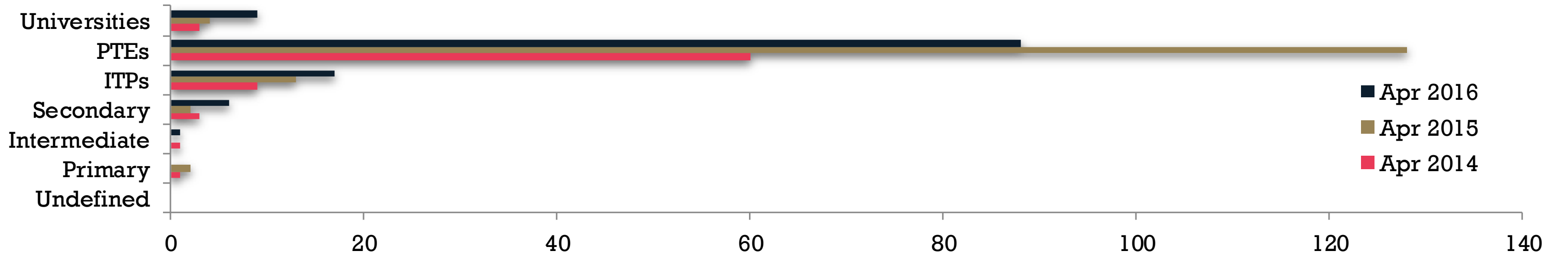


Philippines: 2016 YTD TSV regional change

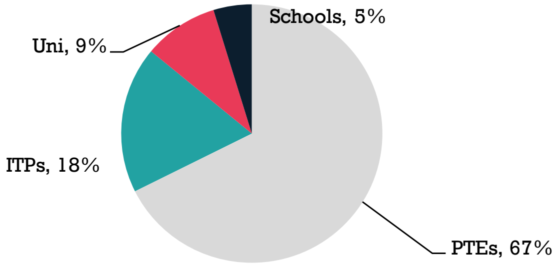
Philippines: Cumulative total for RSV vs. FSV, 2011-2016



Philippines: Total student visas approved by sector, April



Philippines: 2016 YTD Sector breakdown of TSV



Key takeaways:

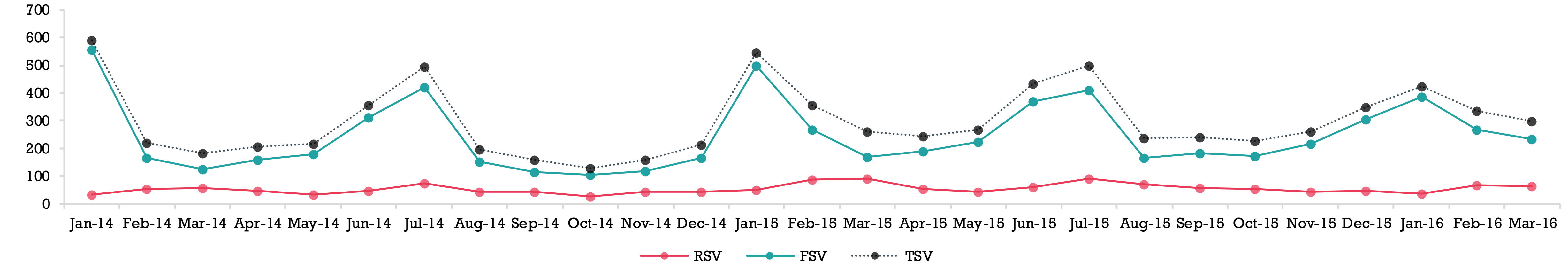
- FSV approved from the Philippines remain down YTD (-33%, -183), further driving down TSV (-27%, -179). This decline follows an exceptional year of growth that would be hard to match. The change in English language requirements (Rule 18) that took place in 2015 had an immediate effect on the number of student visas from the Philippines.
- 95% of TSV approved were in the PTE, ITP and university sectors.

Latin America:

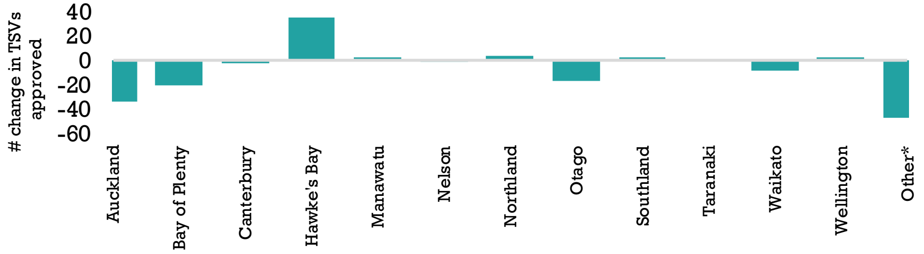
April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
15 ↑ 27%	1 ⇨ 1%	16 ↑ 7%	-44 ↓ -16%	-44 ⇨ -4%	-88 ↓ -6%

YTD (April)

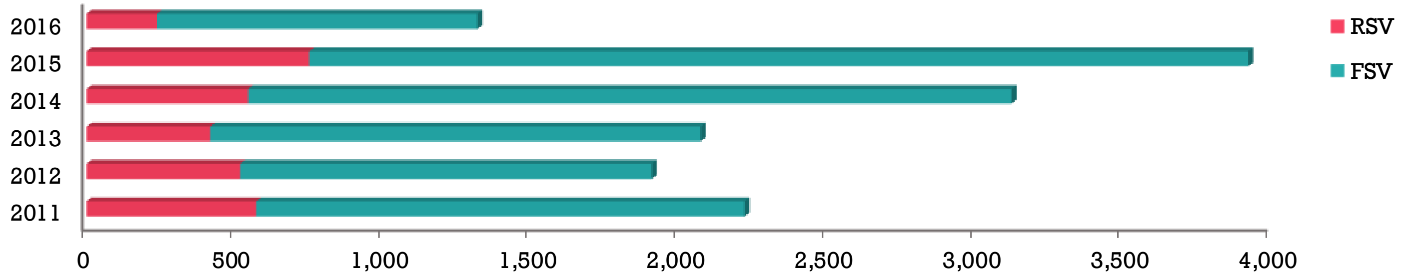
Latin America: student visas approved 2014-2016



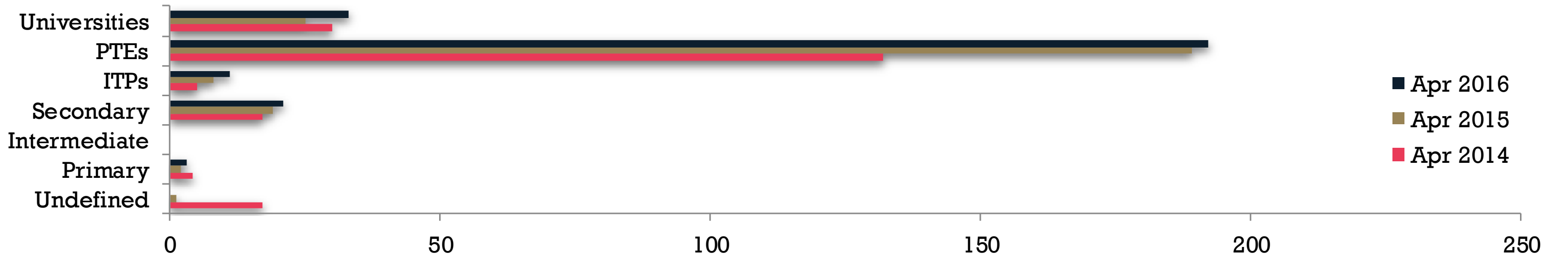
Latin America: 2016 YTD TSV regional change



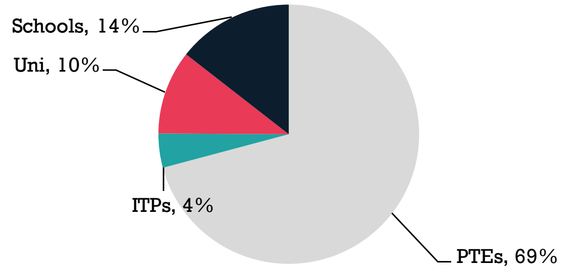
Latin America: Cumulative total for RSV vs. FSV, 2011-2016



Latin America: Total student visas approved by sector, April



Latin America: 2016 YTD Sector breakdown of TSV



Key takeaways:

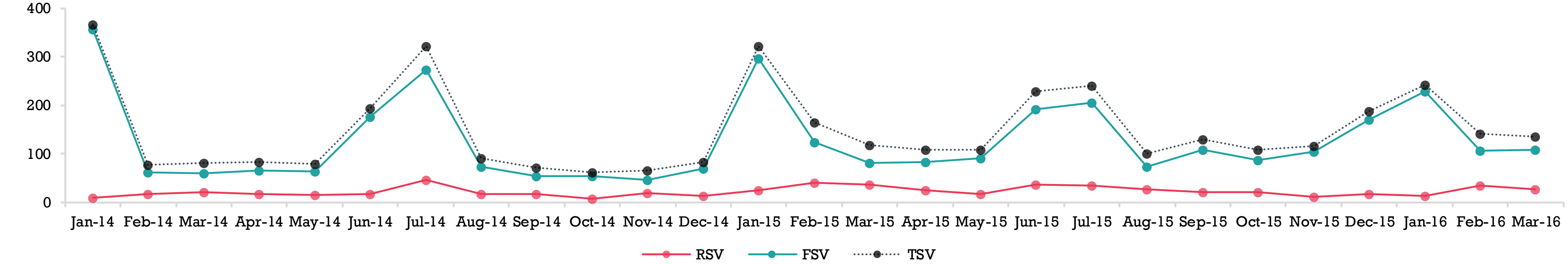
- The Latin America region continued to experience a decline YTD (-6%, -88), being driven by both RSV and FSV. However students who had visas approved to remain in NZ to study did increase in April (+27%, +15).
- The PTE sector accounts for the majority of TSV approved, 69%, followed by the school sectors with 14%.

Brazil:

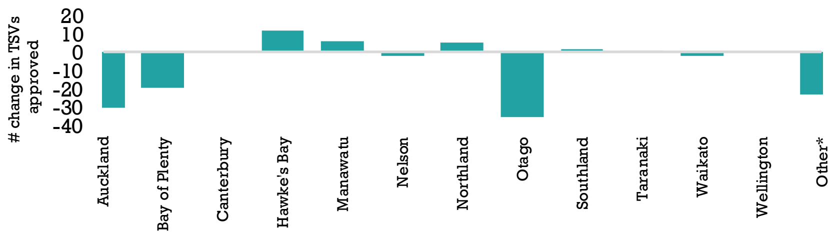
YTD (April)

April RSV		April FSV		April TSV		YTD RSV		YTD FSV		YTD TSV	
3 ⇧	12%	-3 ⇨	-4%	0 ⇨	0%	-25 ⇩	-20%	-60 ⇩	-10%	-85 ⇩	-12%

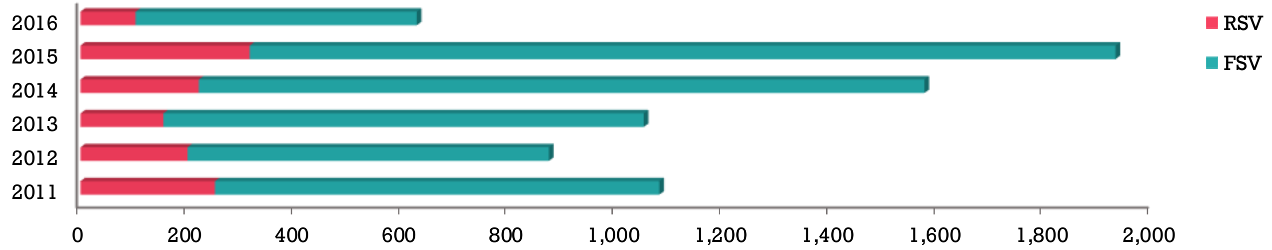
Brazil: student visas approved 2014-2016



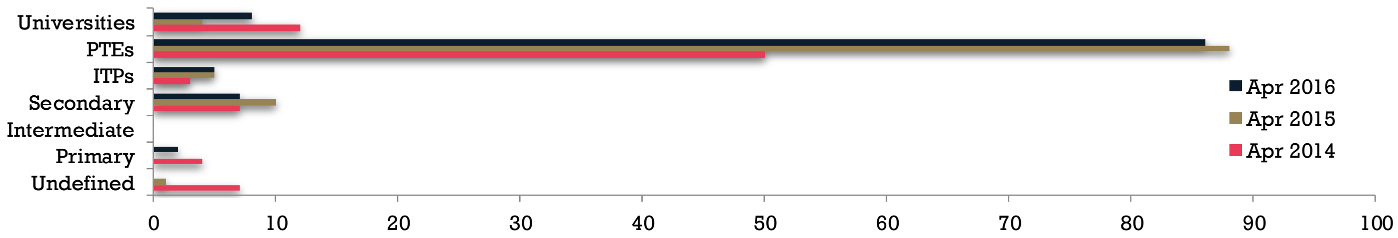
Brazil: 2016 YTD TSV regional change



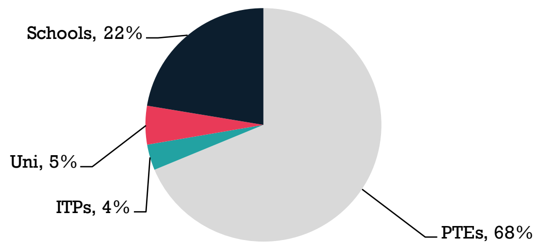
Brazil: Cumulative total for RSV vs. FSV, 2011-2016



Brazil: Total student visas approved by sector, April



Brazil: 2016 YTD Sector breakdown of TSV



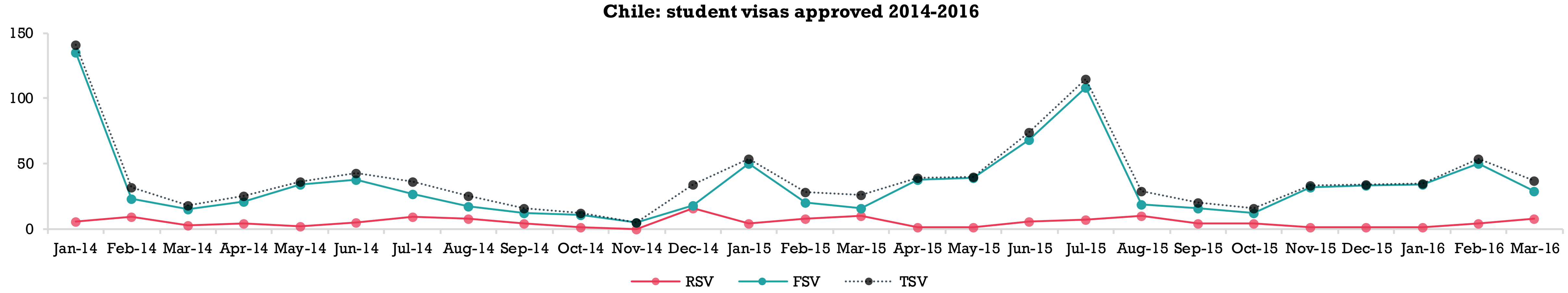
Key takeaways :

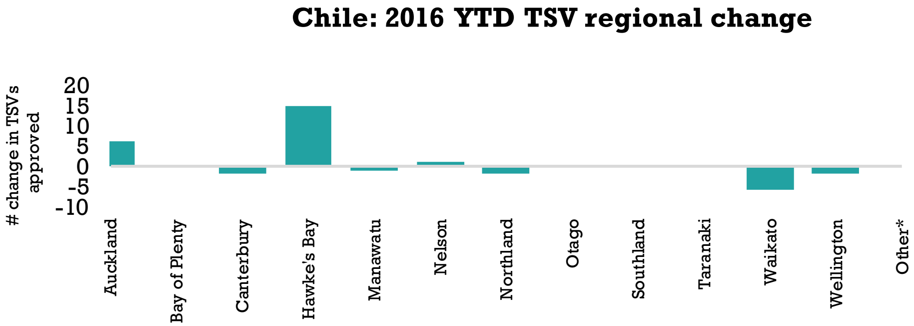
- Brazil continues to see a decline in TSV YTD, down 12% (-85) while April results remain stable compared to April 2015.
- The Brazilian government is in the thick of a political and economic crisis. The government-funded scholarship scheme 'Science Without Borders' (SwB) was put on hold in early-2015 and, at a recent education fair, ENZ representatives found that most students had been planning to study through SwB, and were now researching alternative ways to come to NZ to study. It may take another 12 months to fully understand the impact of this scholarship programme being on hold. In 2014 100 students studied through SwB.

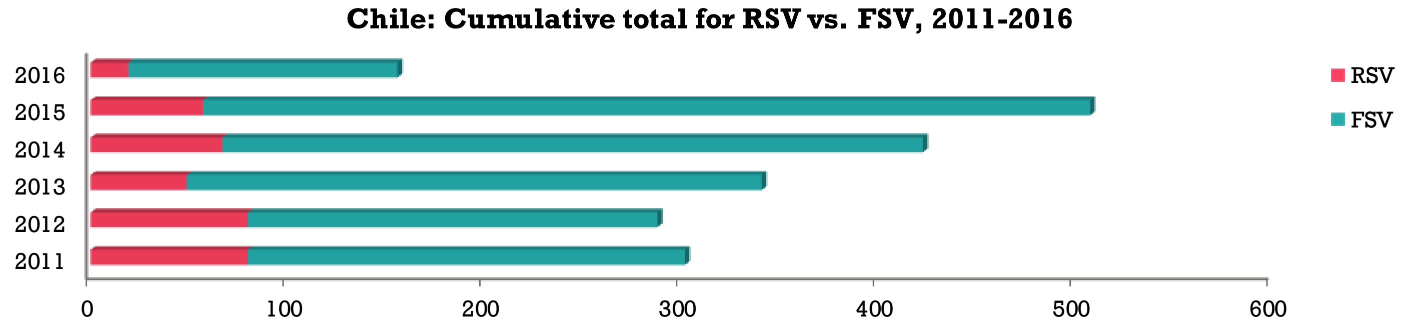
Chile:

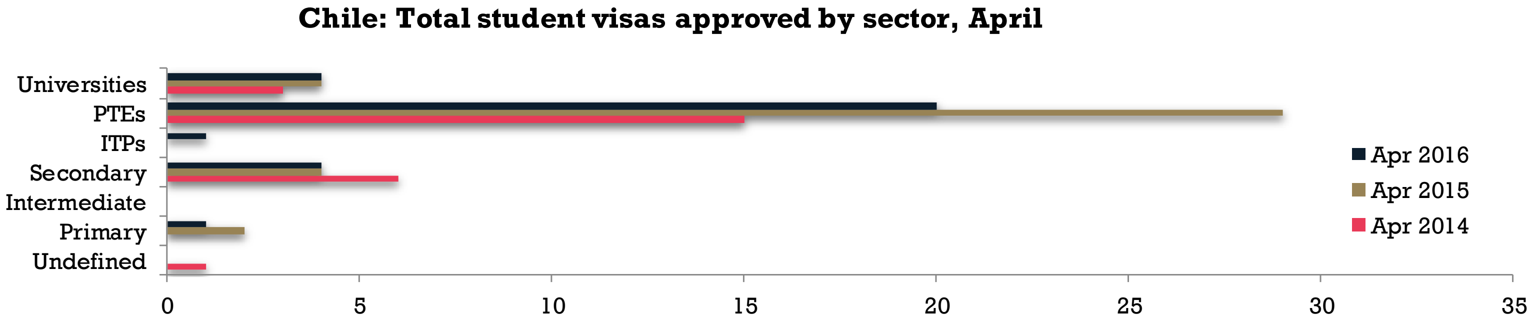
YTD (April)

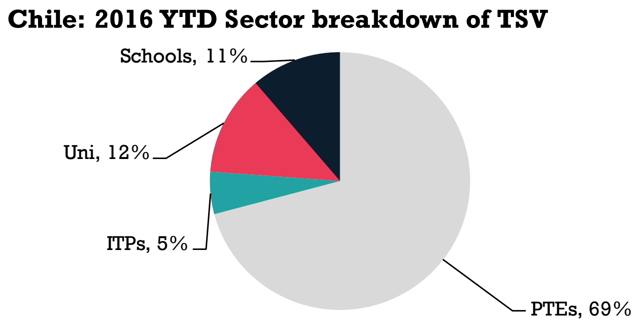
April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
5 ↑ 500%	-14 ↓ -37%	-9 ↓ -23%	-4 ↓ -17%	13 ↑ 10%	9 ↑ 6%











Key takeaways:

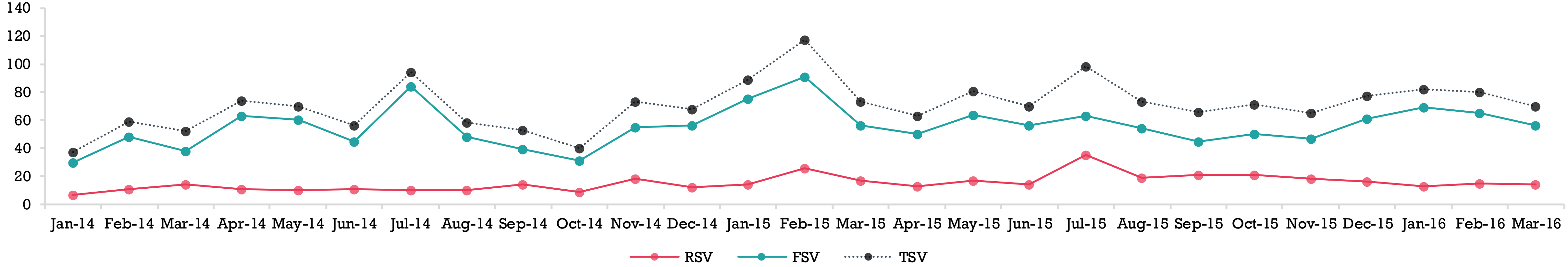
- There have been an additional 13 visas approved for first time students from Chile so far this year (+10%) and this growth has been felt in PTEs in Hawke's Bay.
- 69% of Chilean students are choosing to study at PTEs so far this year.

Colombia:

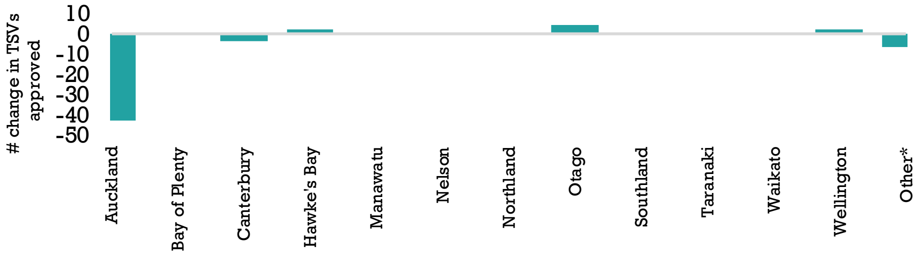
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
8 ⇧ 62%	-7 ⇩ -14%	1 ⇨ 2%	-7 ⇩ -10%	-39 ⇩ -14%	-46 ⇩ -13%

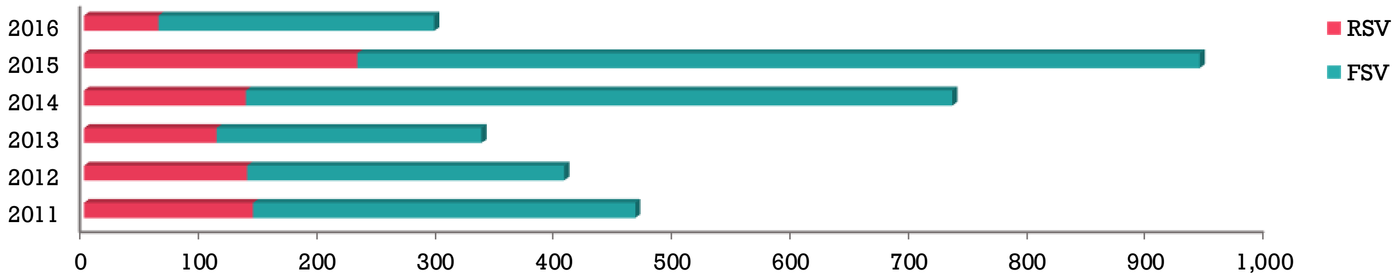
Colombia: student visas approved 2014-2016



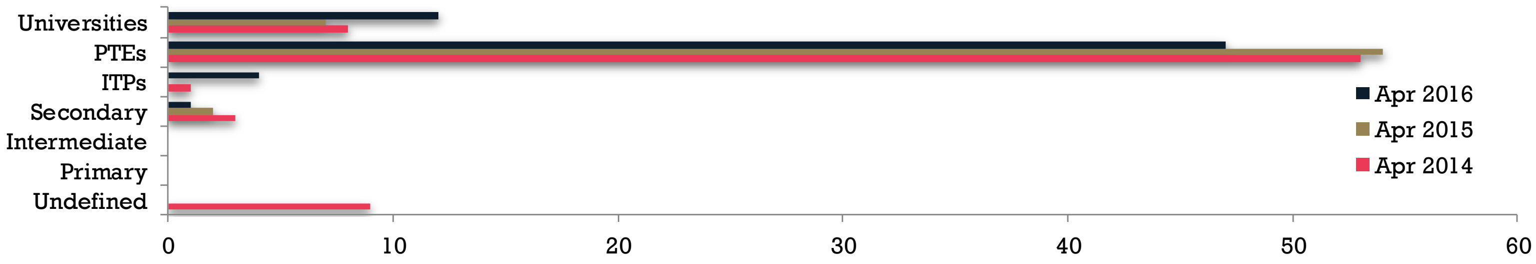
Colombia: 2016 YTD TSV regional change



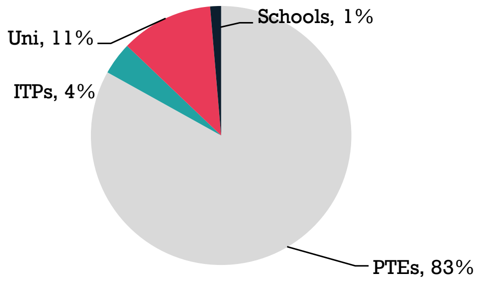
Colombia: Cumulative total for RSV vs. FSV, 2011-2016



Colombia: Total student visas approved by sector, April



Colombia: 2016 YTD Sector breakdown of TSV



Key takeaways:

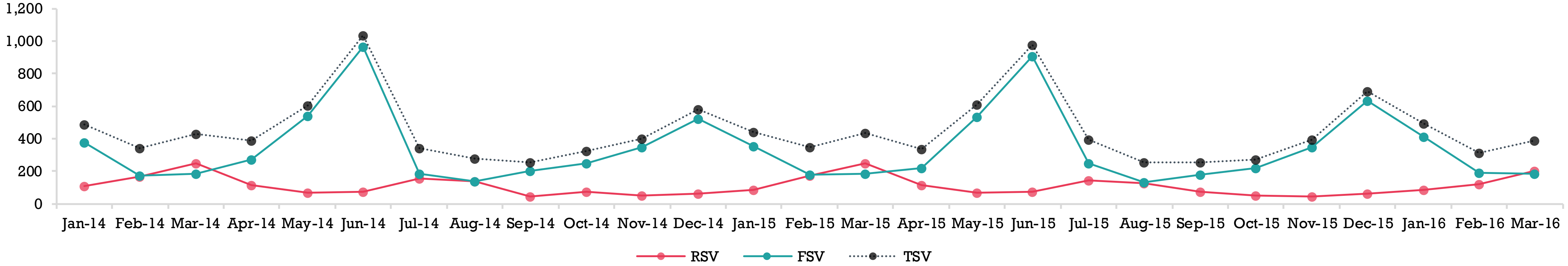
- Results for Colombia continue to decline YTD, driven by both RSV (-10%, -7) and FSV (-14%, -39). However, there was an increase of 8 visas approved for Colombian students returning to NZ to study in April 2016. Similarly to the USA, the YTD decline is not reflective of the market, as there was an increase in TSV approved in Q4 of 2015 (+18%). It is likely agents have learnt from their experience of slow visa processing times and have applied for visas earlier in order to not experience the problems they encountered in 2014/15.

Europe:

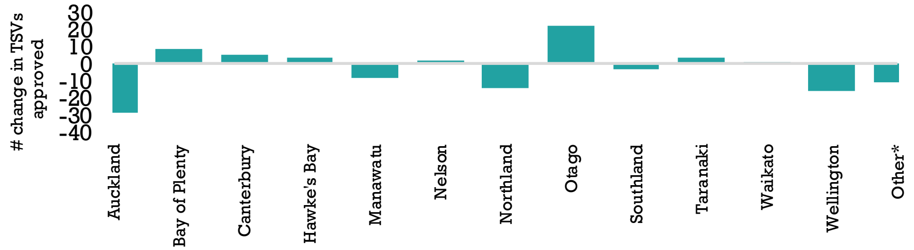
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
-3 -3%	-2 -1%	-5 -1%	-104 -17%	70 7%	-34 -2%

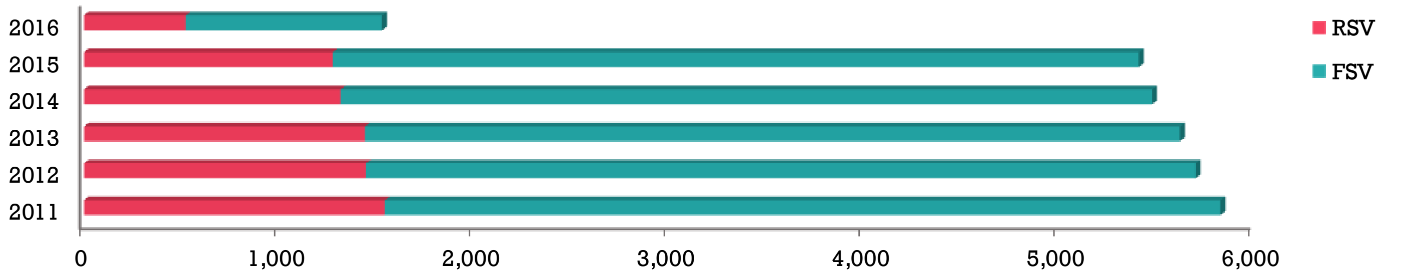
Europe: student visas approved 2014-2016



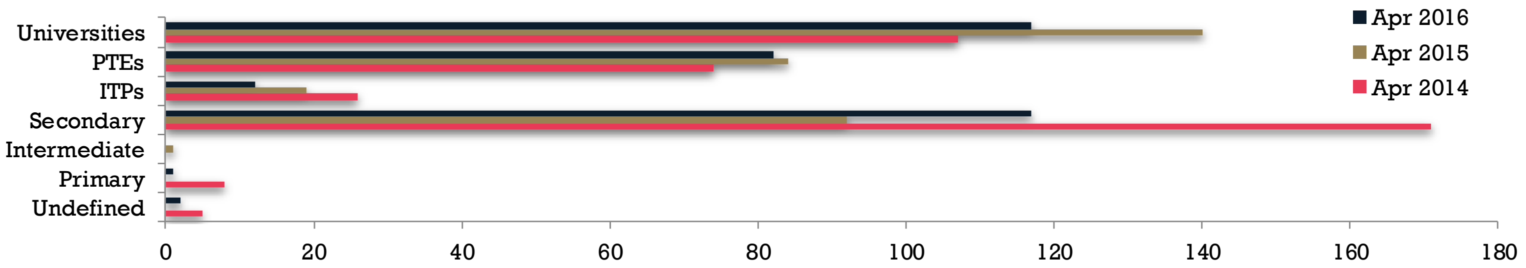
Europe: 2016 YTD TSV regional change



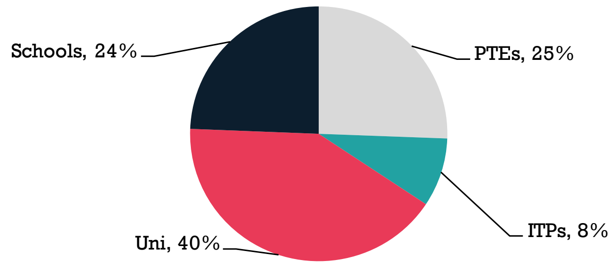
Europe: Cumulative total for RSV vs. FSV, 2011-2016



Europe: Total student visas approved by sector, April



Europe: 2016 YTD Sector breakdown of TSV



Key takeaways:

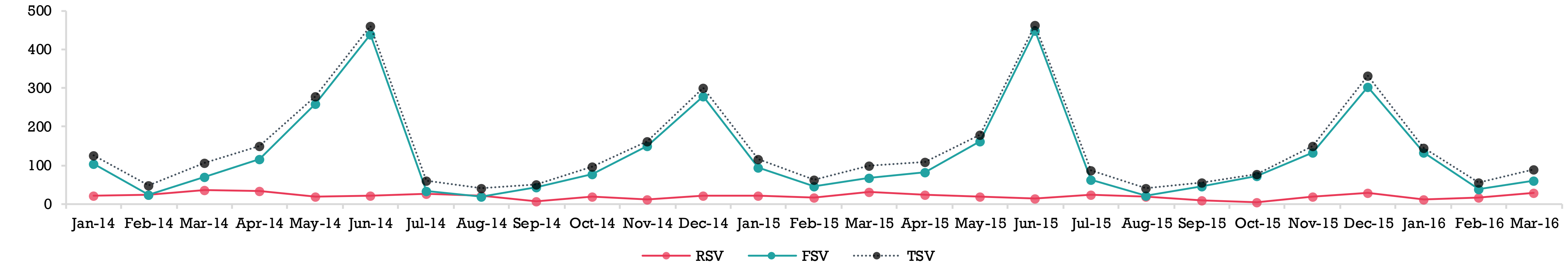
- Europe continues to experience strong growth in FSV, up 7% YTD (+70). However, there are fewer students returning to study YTD compared to the same period last year (-17%, -104).
- The increase in FSV is being driven by France (+22%, +21), Germany (+7%, +21) and Switzerland (+47%, +14).
- The university, PTE and school sectors attract the majority of European students (92%).

Germany:

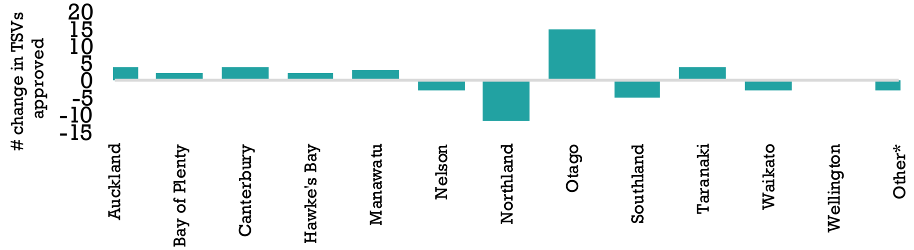
April RSV		April FSV		April TSV		YTD RSV		YTD FSV		YTD TSV	
-2	-8%	-6	-7%	-8	-7%	-13	-14%	21	7%	8	2%

YTD (April)

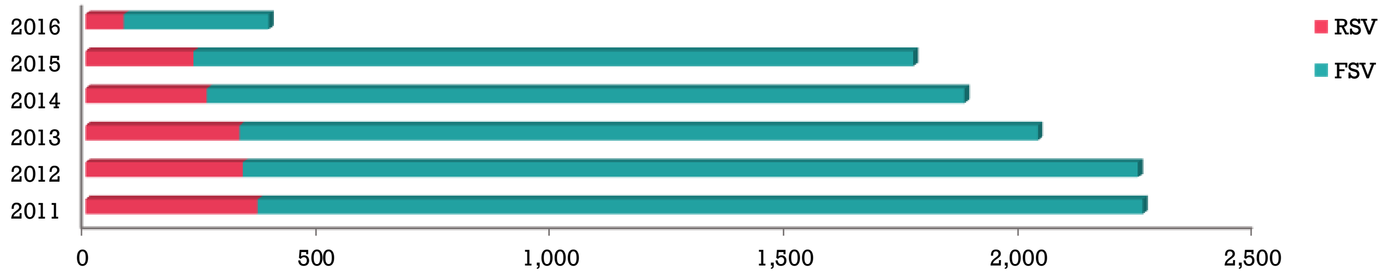
Germany: student visas approved 2014-2016



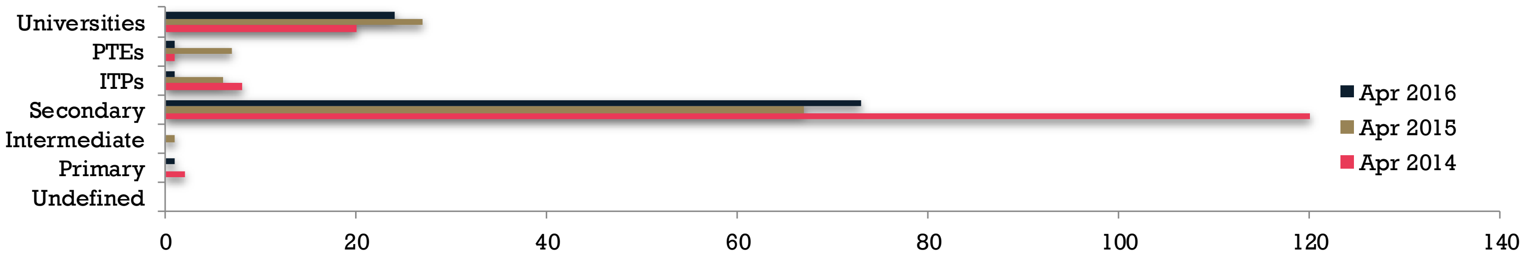
Germany: 2016 YTD TSV regional change



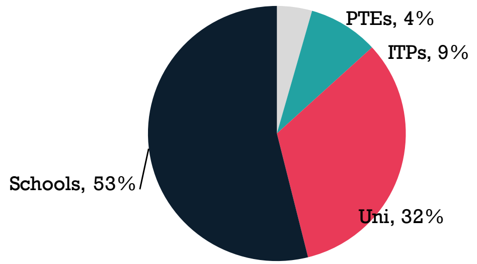
Germany: Cumulative total for RSV vs. FSV, 2011-2016



Germany: Total student visas approved by sector, April



Germany: 2016 YTD Sector breakdown of TSV



Key takeaways:

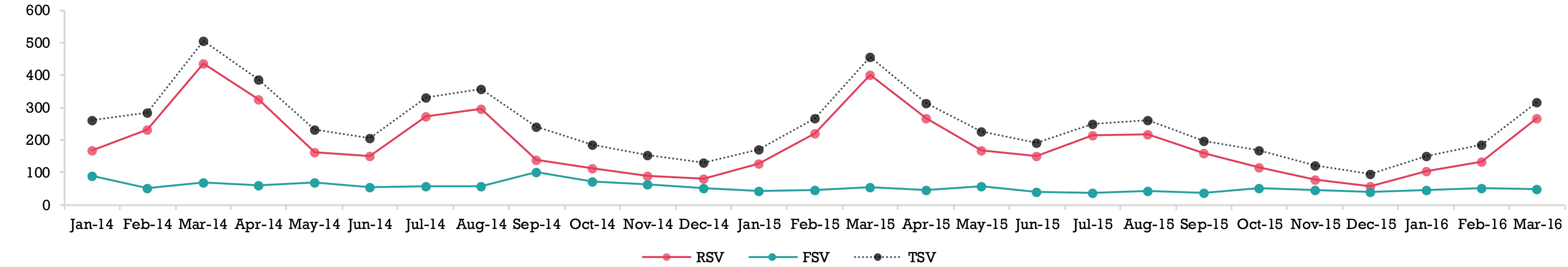
- Germany continues to experience growth in FSV, up 7% (+21) YTD. However, there are fewer students returning to study YTD, compared to the same period last year (-14%, -13).
- 51% of German students are in the school sector YTD and further analysis shows this is growth in secondary schools.
- The growth is being seen across all regions except Northland, Southland and Wellington.

Middle East:

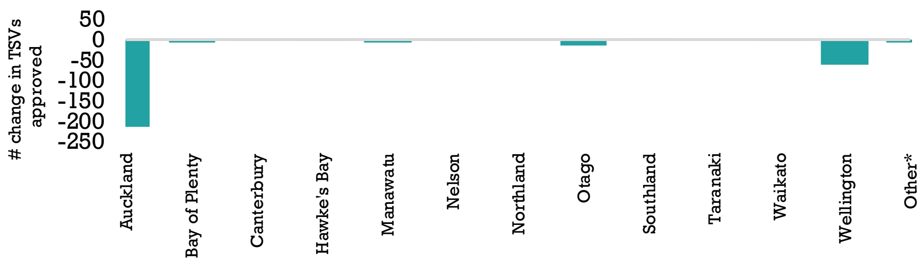
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
-78 ⇩ -29%	-18 ⇩ -39%	-96 ⇩ -31%	-323 ⇩ -32%	-12 ⇩ -6%	-335 ⇩ -28%

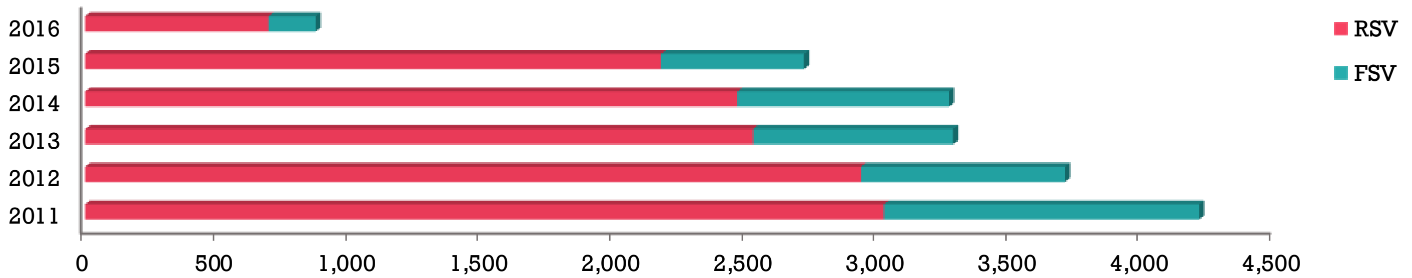
Middle East: student visas approved 2014-2016



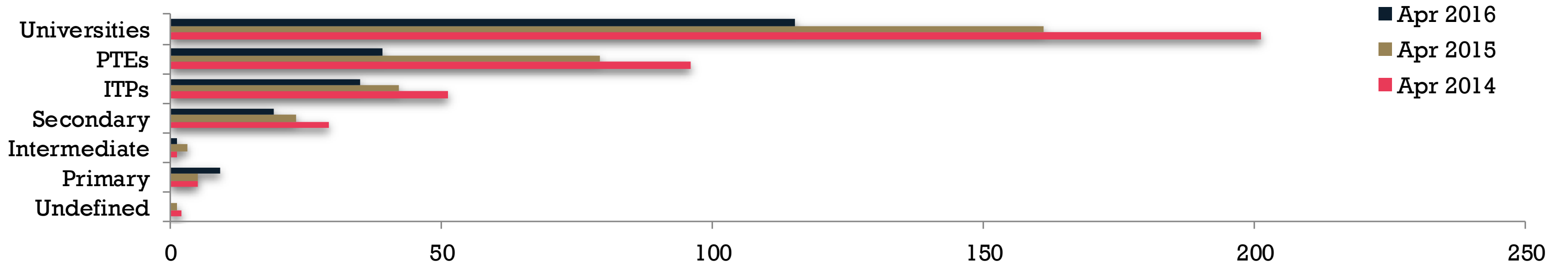
Middle East: 2016 YTD TSV regional change



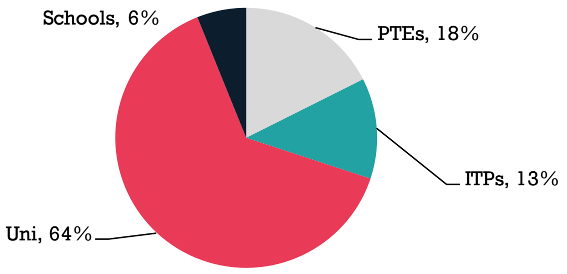
Middle East: Cumulative total for RSV vs. FSV, 2011-2016



Middle East: Total student visas approved by sector, April



Middle East: 2016 YTD Sector breakdown of TSV



Key takeaways:

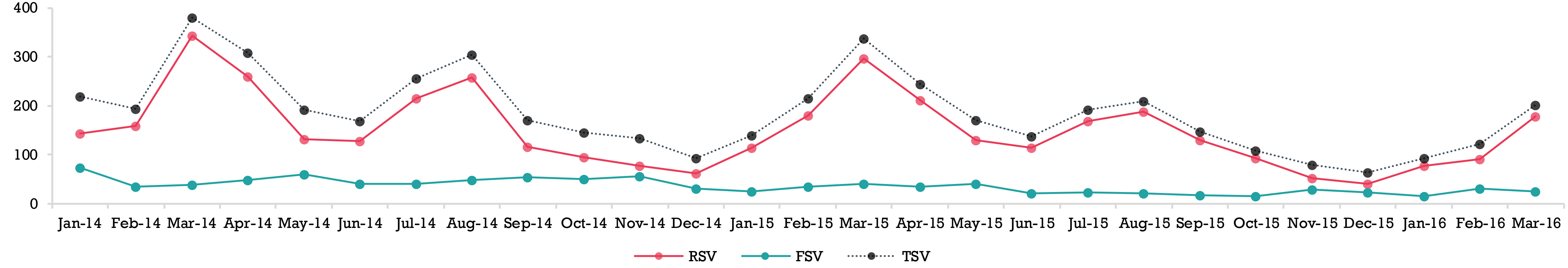
- Results continue to be down for the Middle East being driven by a lower number of students returning to NZ to study, compared to the same period last year (-32%, -323).
- First time students are also decreasing, down 6% YTD (-12). While FSV approved for students from Saudi Arabia are down (-31%, -41), there has been an increase in 29 FSV approved for Iranian students YTD (+121%). The university sector accounts for 64% of TSV approved followed by the PTE sector with 18%.

Saudi Arabia:

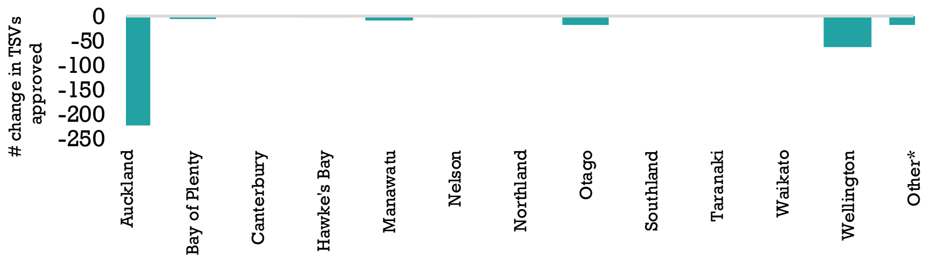
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
-62 ⇩ -29%	-12 ⇩ -35%	-74 ⇩ -30%	-308 ⇩ -38%	-41 ⇩ -31%	-349 ⇩ -37%

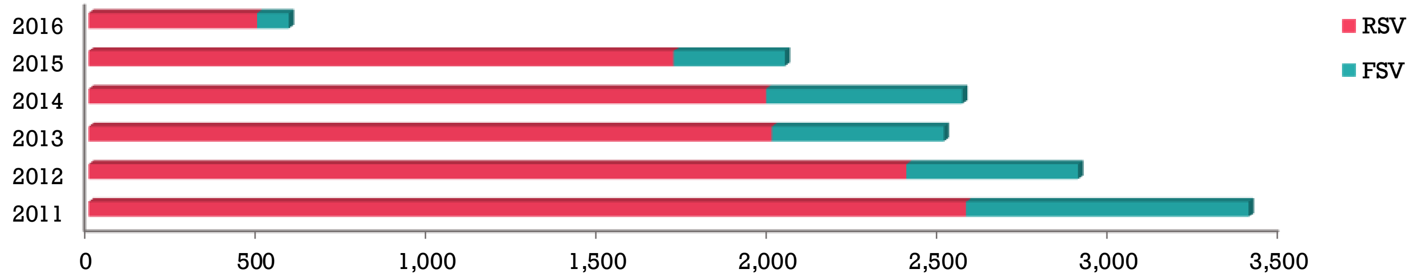
Saudi Arabia: student visas approved 2014-2016



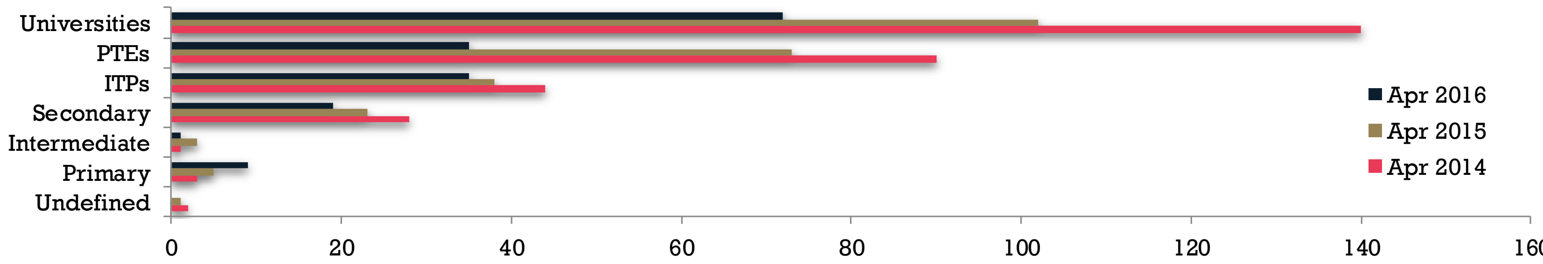
Saudi Arabia: 2016 YTD TSV regional change



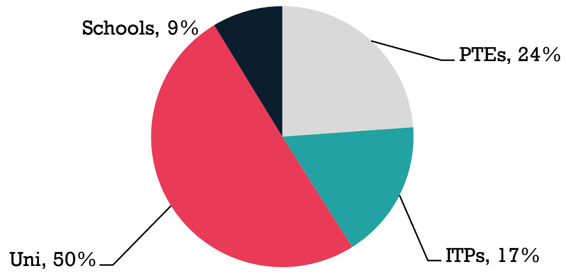
Saudi Arabia: Cumulative total for RSV vs. FSV, 2011-2016



Saudi Arabia: Total student visas approved by sector, April



Saudi Arabia: 2016 YTD Sector breakdown of TSV



Key takeaways:

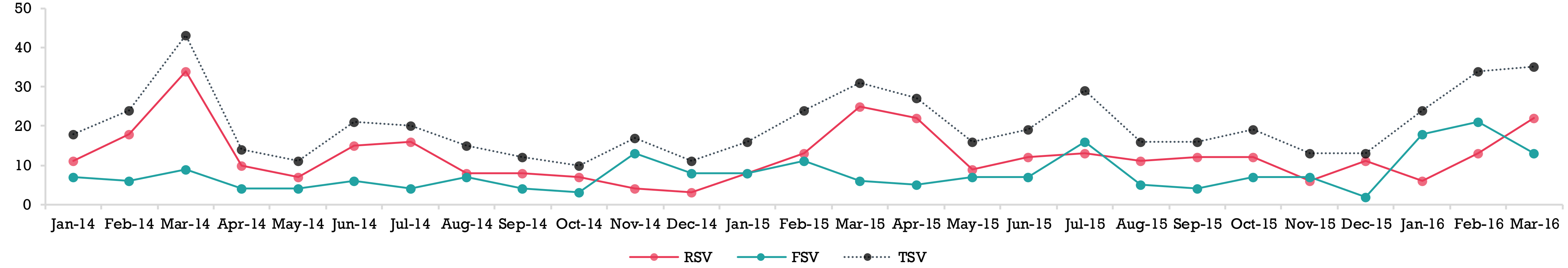
- Saudi Arabia continues to see negative results, with TSV down YTD (-37%, -349). This is being driven by both a decline in FSV and RSV.
- The university sector for this market is down 29% (-122), due to the delay in scholarship allocations being finalised. PTEs and ITPs have also faced Saudi expenditure reductions, down 49% (-133) and 45% (-81) respectively.

Pakistan:

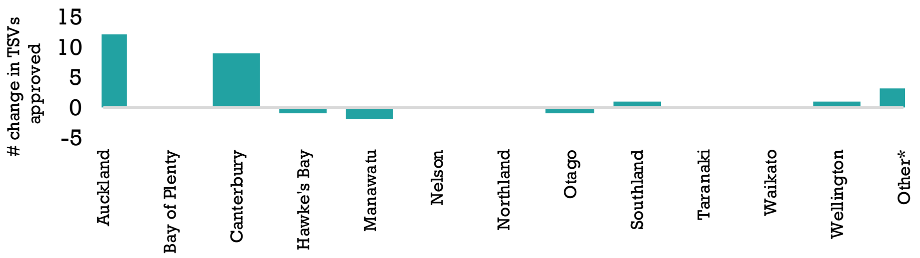
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
-4 -18%	4 80%	0 0%	-9 -13%	31 103%	22 22%

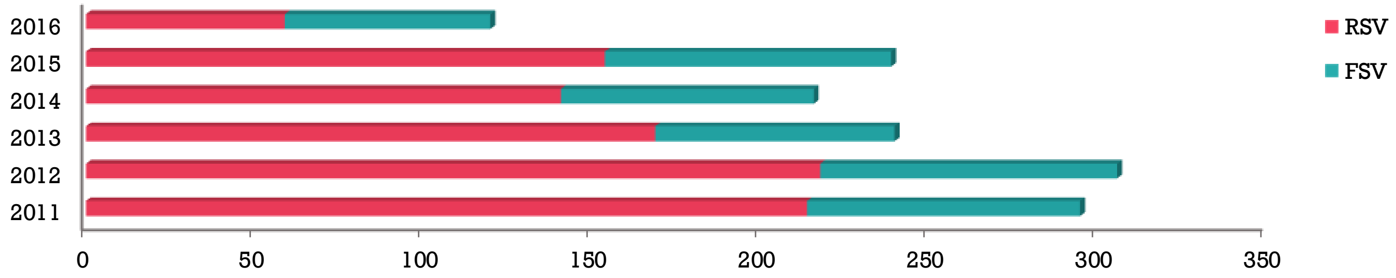
Pakistan: student visas approved 2014-2016



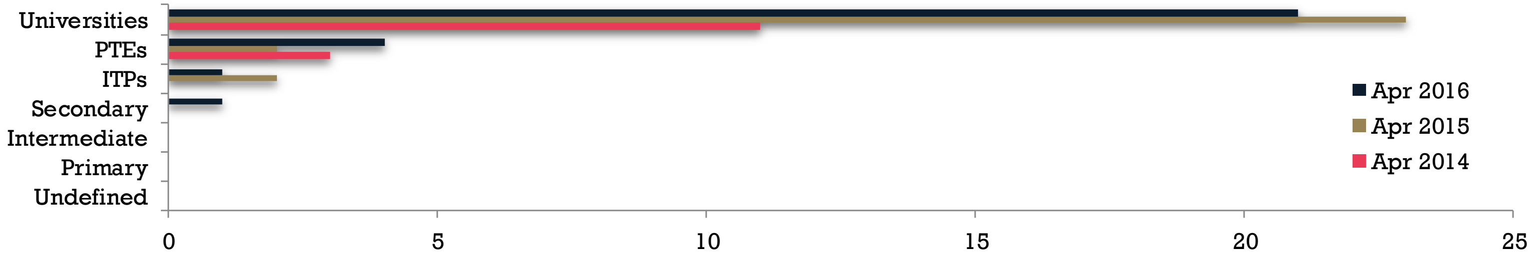
Pakistan: 2016 YTD TSV regional change



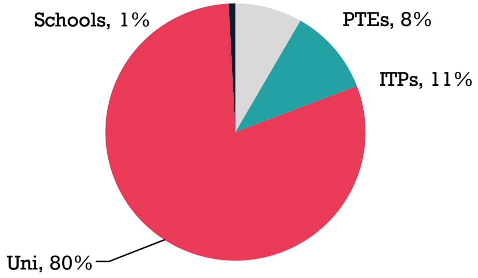
Pakistan: Cumulative total for RSV vs. FSV, 2011-2016



Pakistan: Total student visas approved by sector, April



Pakistan: 2016 YTD Sector breakdown of TSV



Key takeaways:

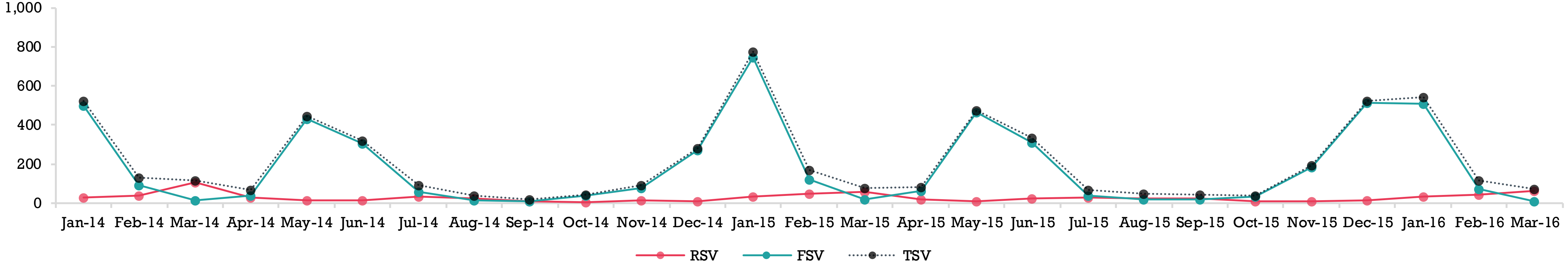
- Pakistan has seen good results YTD, with TSV increasing by 22% (+22). This is being driven by an increase in FSV (+103%, +31), led by higher level university programmes.
- This market is driven by the university sector, with 80% of TSV approved YTD.
- Auckland and Canterbury regions have benefited from these increases.

USA:

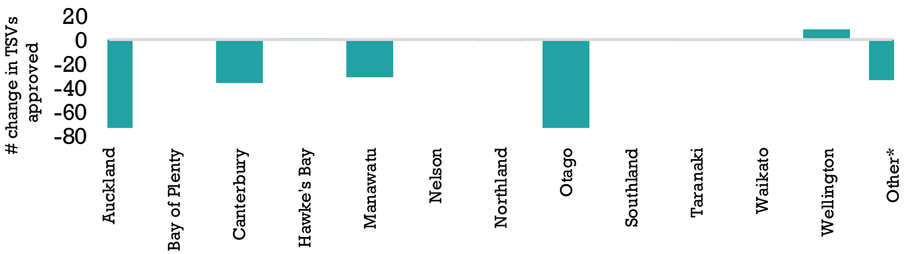
April RSV		April FSV		April TSV		YTD RSV		YTD FSV		YTD TSV	
16	84%	33	53%	49	60%	15	9%	-254	-27%	-239	-22%

YTD (April)

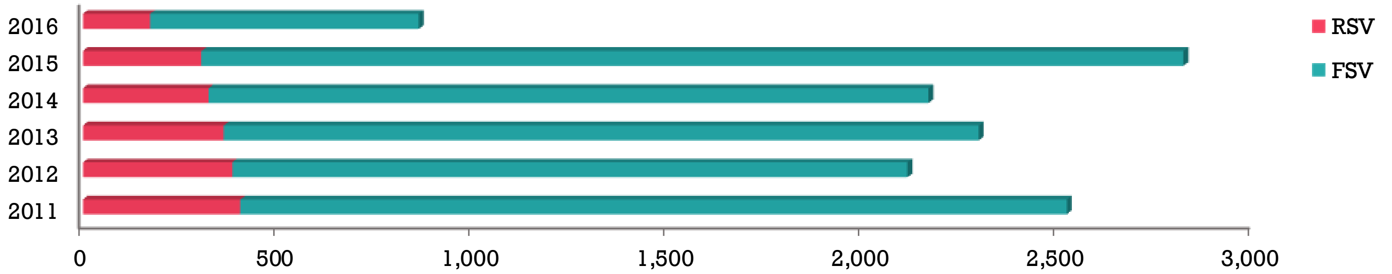
USA: student visas approved 2014-2016



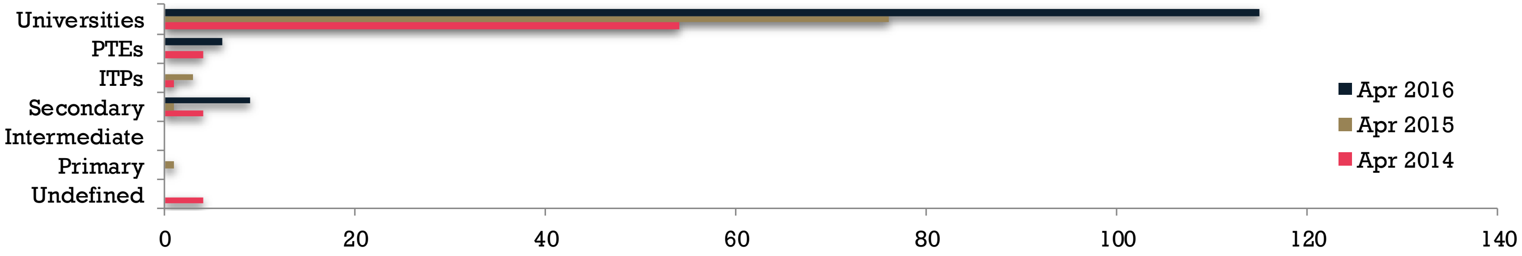
USA: 2016 YTD TSV regional change



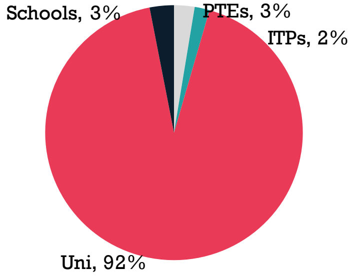
USA: Cumulative total for RSV vs. FSV, 2011-2016



USA: Total student visas approved by sector, April



USA: 2016 YTD Sector breakdown of TSV



Key takeaways:

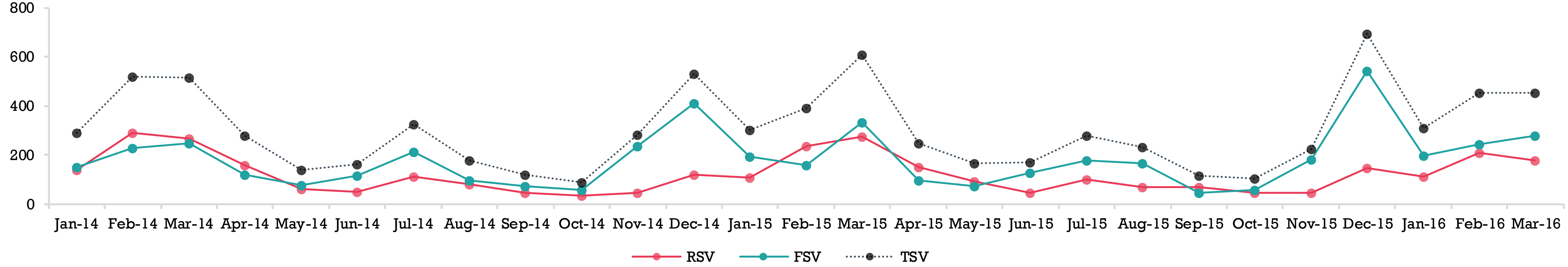
- While USA TSV appear to be much lower than normal YTD (-22%, -239), this is not reflective of the market. There was an 82% increase in the last quarter of 2015, where visas typically approved in the first quarter of 2016, were approved earlier.
- April 2016 saw strong results, with TSV up 60% (+49), including an additional 33 FSV approved (+52%) compared to April 2015.
- The university sector makes up the majority of TSV approved for USA (92%).

Japan:

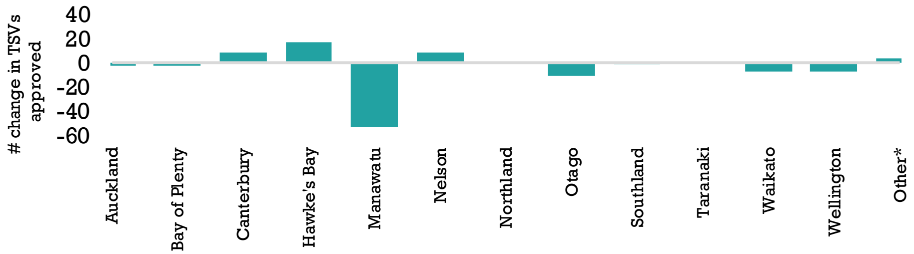
YTD (April)

April RSV			April FSV			April TSV			YTD RSV			YTD FSV			YTD TSV		
17	↑	11%	23	↑	24%	40	↑	16%	-107	↓	-14%	57	↑	7%	-50	→	-3%

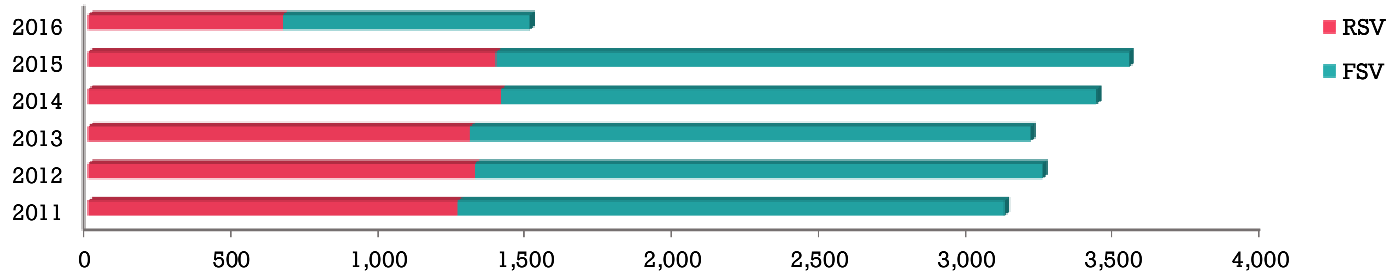
Japan: student visas approved 2014-2016



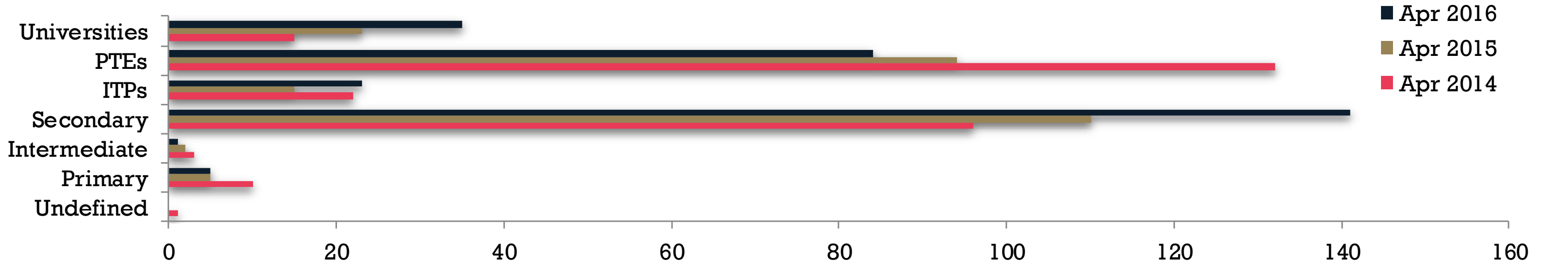
Japan: 2016 YTD TSV regional change



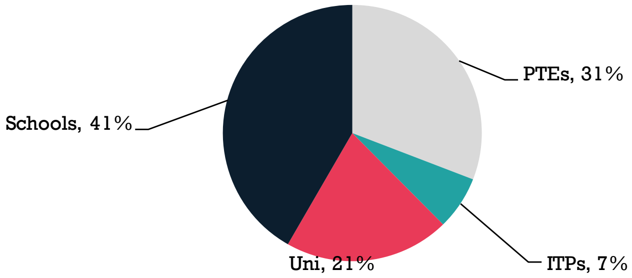
Japan: Cumulative total for RSV vs. FSV, 2011-2016



Japan: Total student visas approved by sector, April



Japan: 2016 YTD Sector breakdown of TSV



Key takeaways:

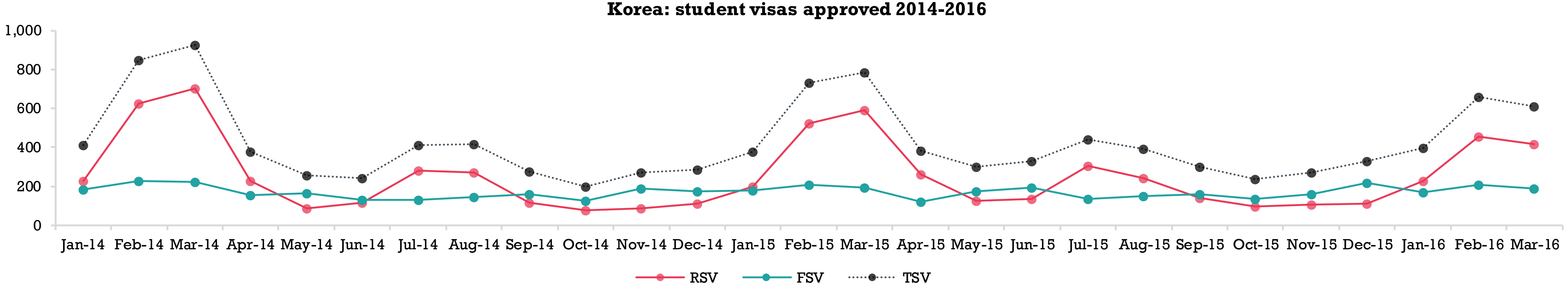
- Japan has seen an increase in FSV approved YTD (+7%, +57), however, the number of students returning to study has declined compared to 2015 YTD (-14%, -107).
- The school and PTE sectors draw 72% of Japanese students to NZ and April saw strong results, with an additional 23 FSV approved for PTEs.

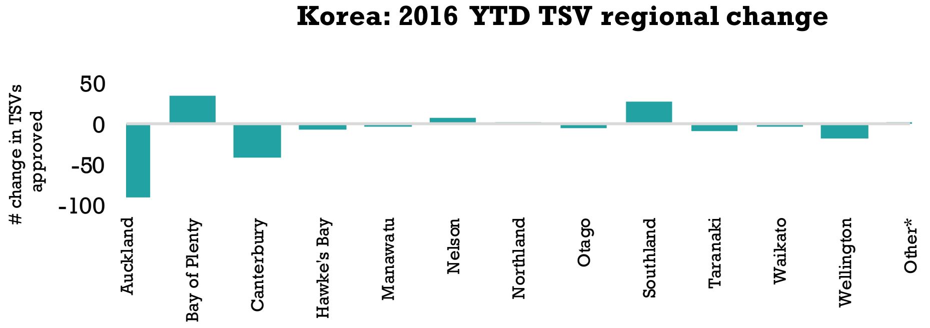
Korea:

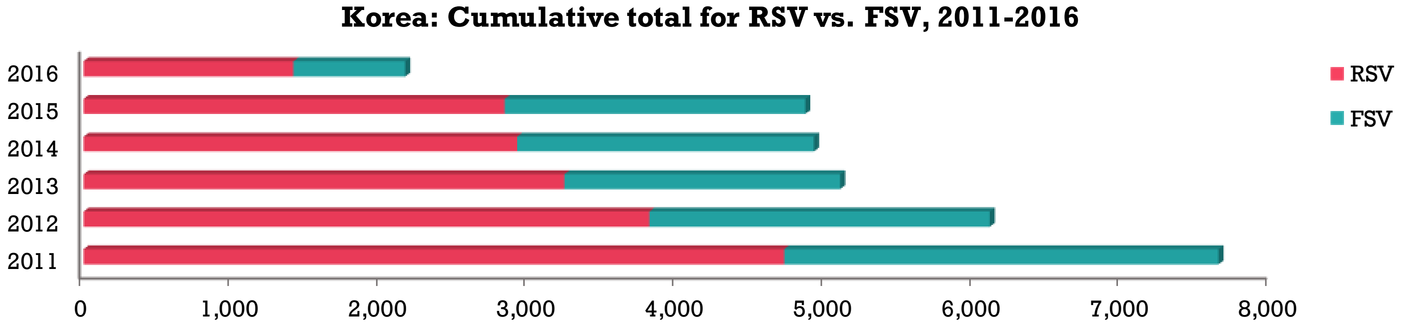
April RSV		April FSV		April TSV	
54	↑ 21%	71	↑ 59%	125	↑ 33%

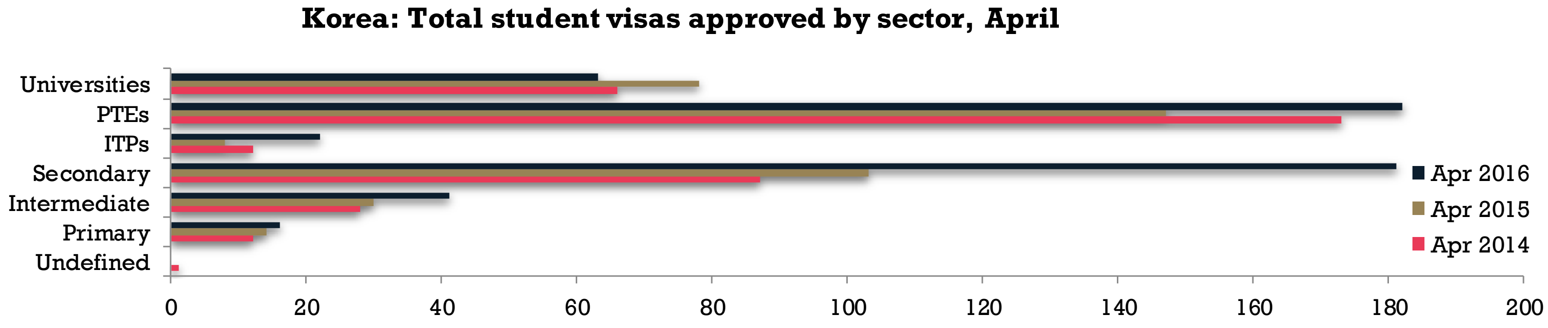
YTD (April)

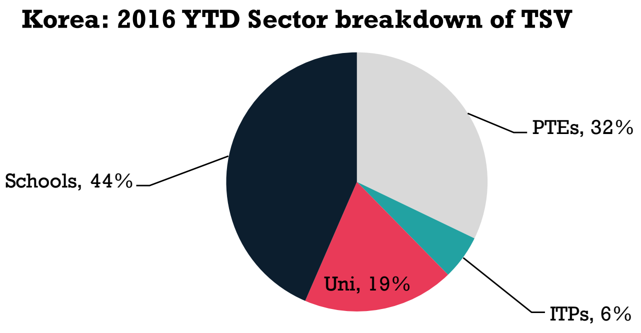
YTD RSV		YTD FSV		YTD TSV	
-159	↓ -10%	56	↑ 8%	-103	↓ -5%











Key takeaways:

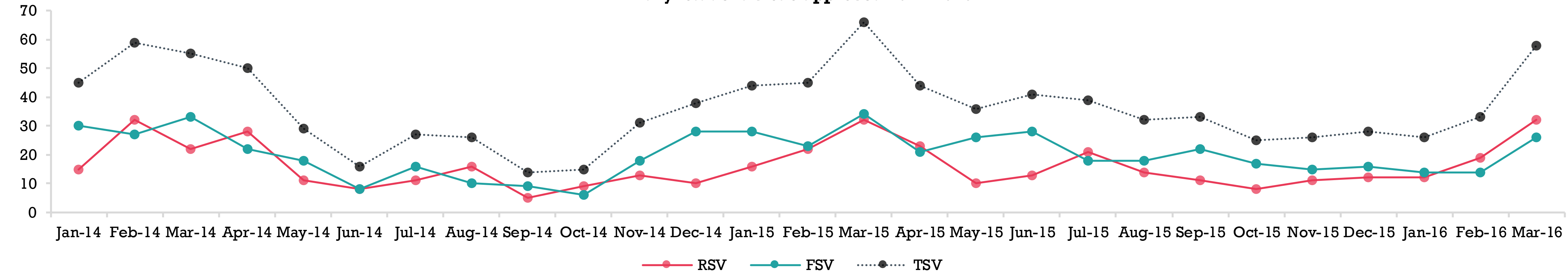
- Korea results were down YTD with a reduction seen in TSV (-5%, -103) driven mainly by RSV (-10%, -159). This decline has been felt in the school sector (-9%, -99) and the university sector YTD (-12%, -54).
- It has been suggested that Korean students are less encouraged to study abroad in English-speaking countries due to changing (and uncertain) domestic university entrance policies.

Trends by sector

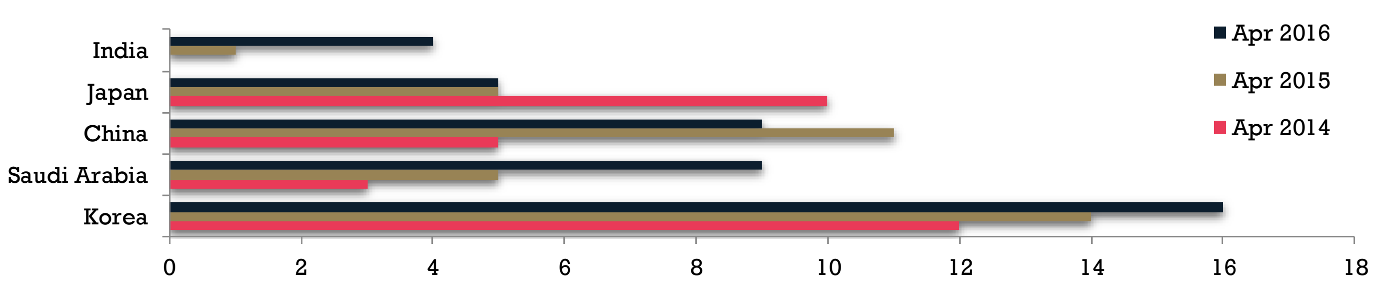
Primary Schools:

YTD (April)

Primary: student visas approved 2014-2016

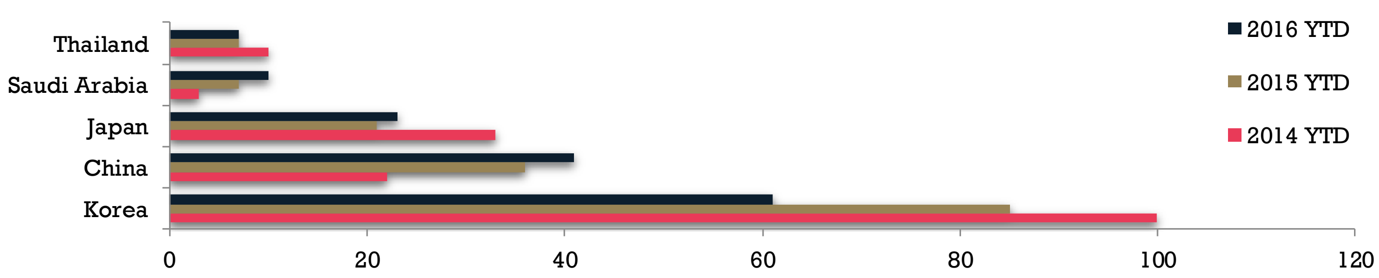


Primary: Total student visas approved by sector, April

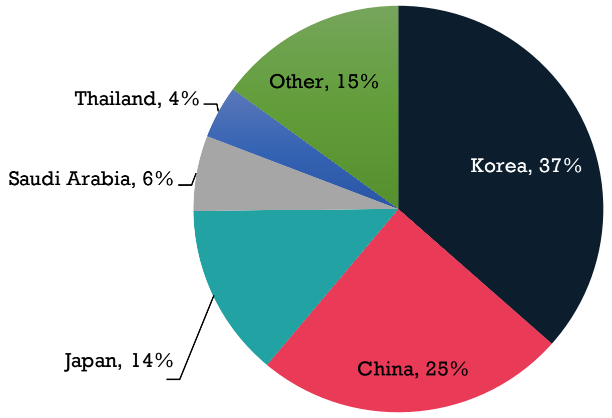


April RSV			April FSV			April TSV		
3	↑	13%	3	↑	14%	6	↑	14%
YTD RSV			**YTD FSV**			**YTD TSV**		
-4	↓	-4%	-28	↓	-26%	-32	↓	-16%

Primary: Total student visas approved by sector, YTD



Primary: YTD 2016 Sector breakdown of TSV

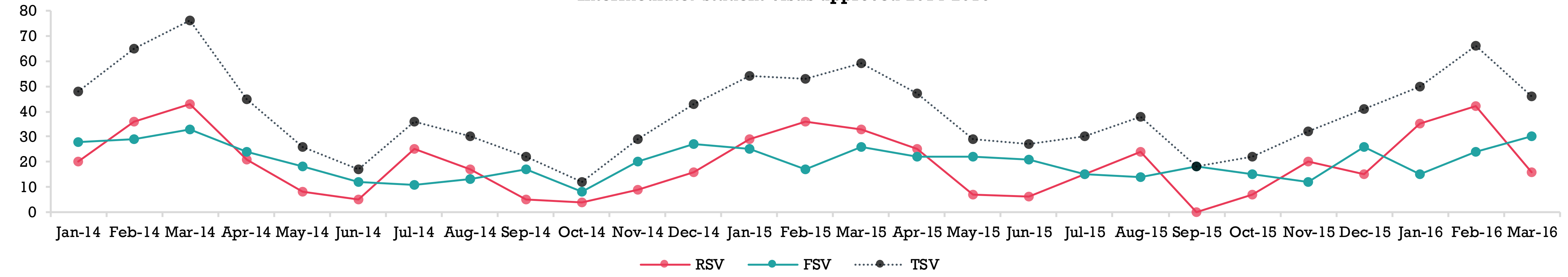


Key takeaways:

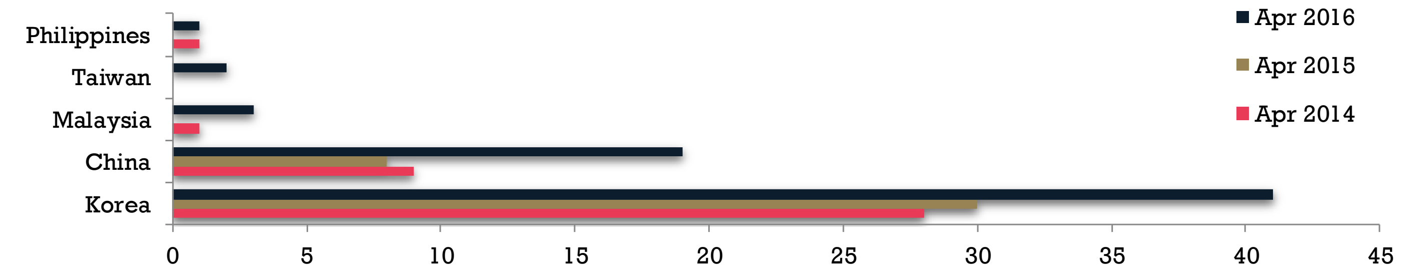
- Despite increases seen in April 2016, the number of TSV approved for the primary school sector continues to decline YTD compared to the same period last year (-16%, -32). This is mainly being driven by FSV (-26%, -28).
- Increases in TSV approved for the primary school sector in April came from India, South Korea and Saudi Arabia.

Intermediate Schools:

Intermediate: student visas approved 2014-2016

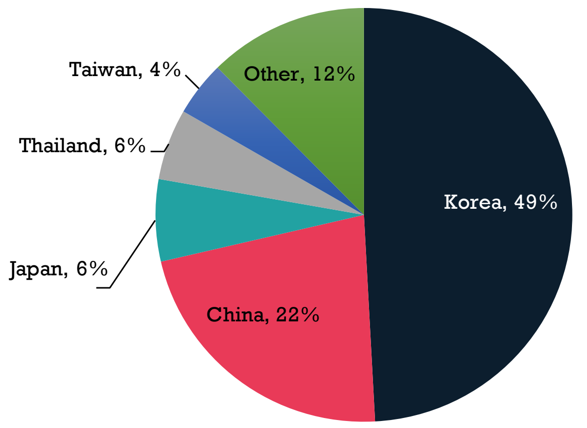


Intermediate: Total student visas approved by sector, April

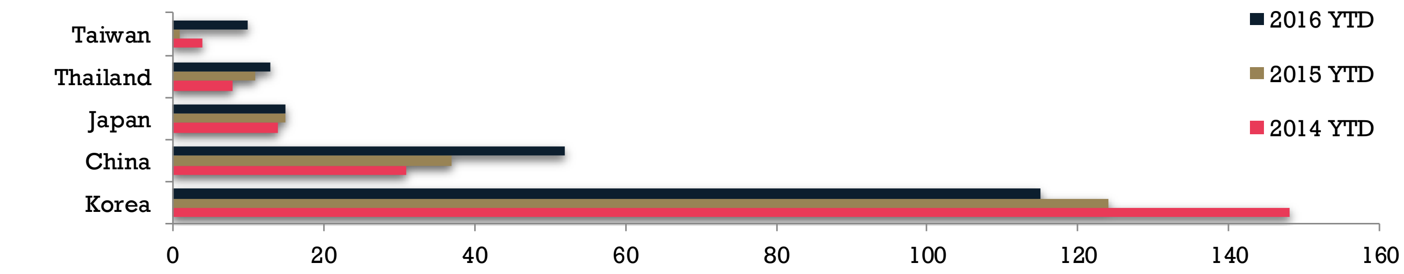


April RSV		April FSV		April TSV	
9	36%	16	73%	25	53%
YTD RSV		**YTD FSV**		**YTD TSV**	
4	3%	17	19%	21	10%

Intermediate: YTD 2016 Sector breakdown of TSV



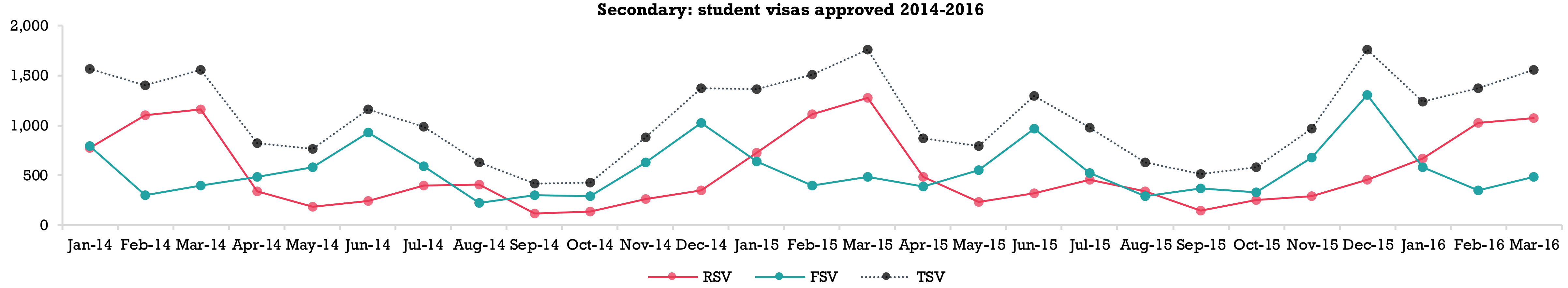
Intermediate: Total student visas approved by sector, YTD

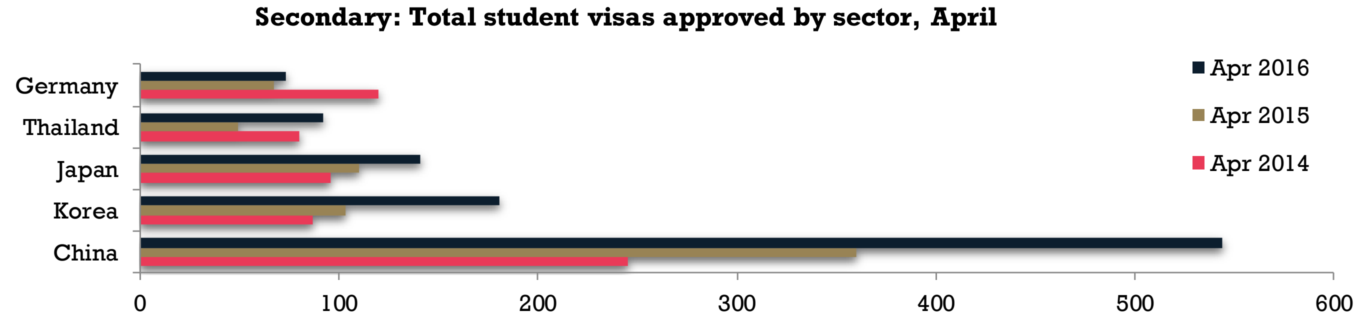


Key takeaways:

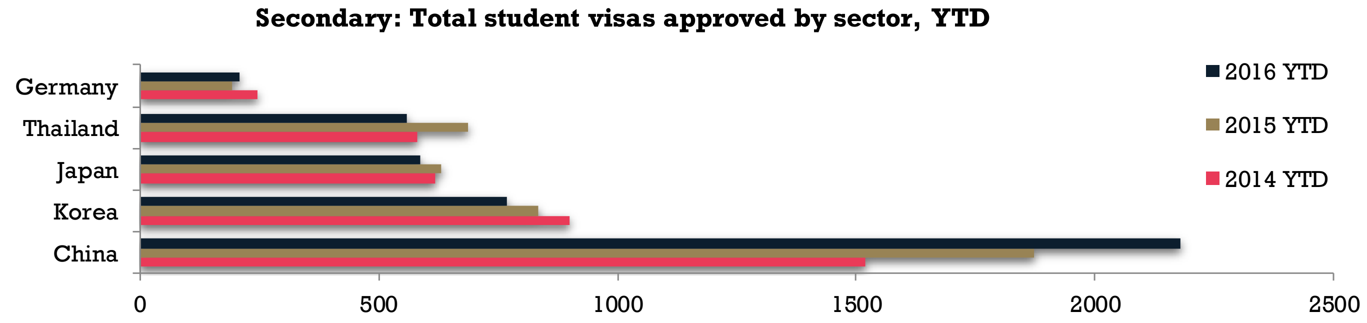
- The intermediate school sector is experiencing growth in TSV YTD (+10%, +21). There was a 73% increase in FSV approved in April 2016 compared to April 2015. This includes growth from Korea and China, whose students make up 71% of international students within the Intermediate sector.
- Auckland and Bay of Plenty have experienced increases in Intermediate students this year.

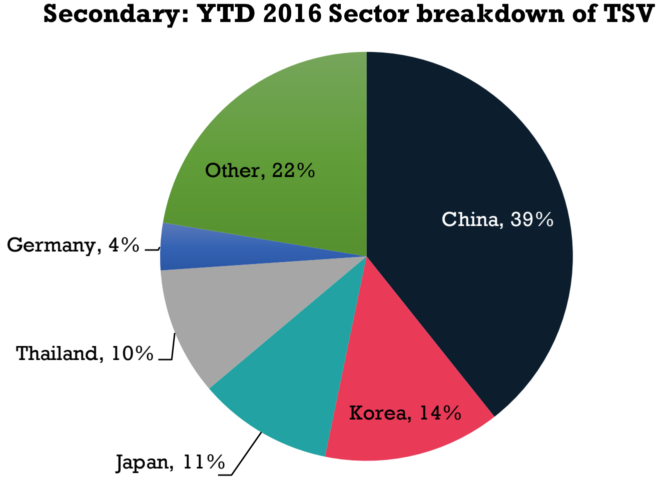
Secondary Schools:





April RSV			April FSV			April TSV		
427	↑	88%	62	↑	16%	489	↑	56%
YTD RSV			**YTD FSV**			**YTD TSV**		
74	→	2%	-43	→	-2%	31	→	1%

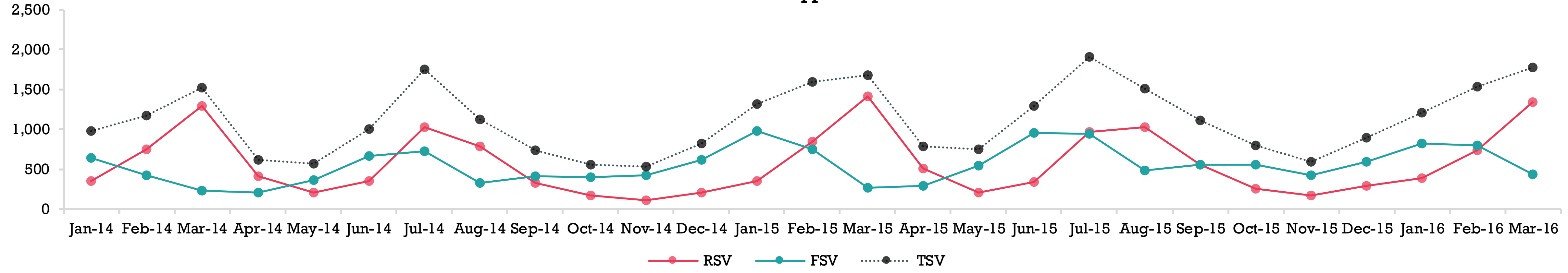




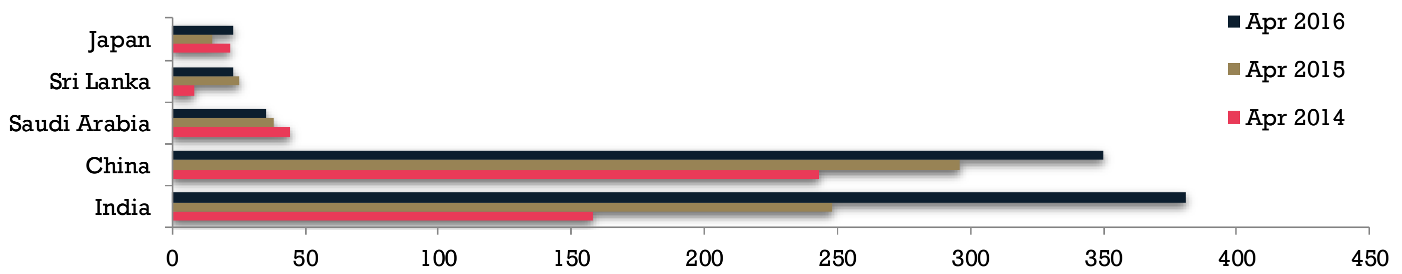
Key takeaways:
- The secondary school market has stabilised YTD following a strong month in April, with TSV up 56% (+489). This is being driven by RSV, up 88%, (+427).
- Top markets contributing to the increase in TSV in April include China, Korea, Japan and Thailand.
- These April increases are being felt in secondary schools within most NZ regions, in particular: Auckland (+179), Wellington (+74) and Bay of Plenty (+52).

Institute of Technology and Polytechnics (ITPs):

ITPs: student visas approved 2014-2016

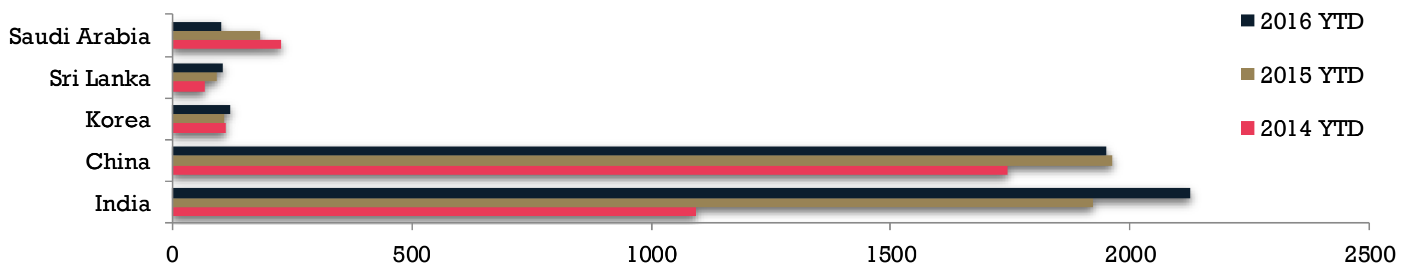


ITPs: Total student visas approved by sector, April

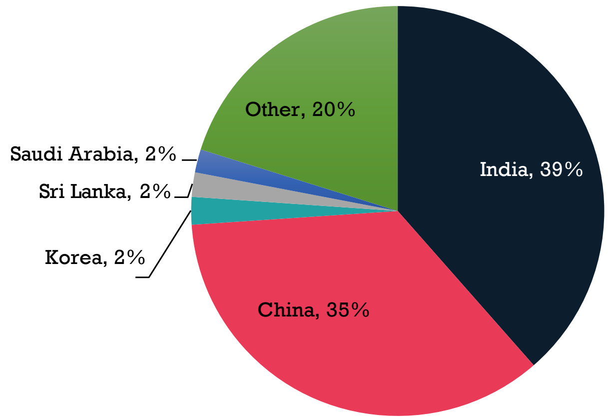


April RSV			April FSV			April TSV		
165	↑	33%	46	↑	16%	211	↑	27%
YTD RSV			**YTD FSV**			**YTD TSV**		
38	⇨	1%	101	↑	4%	139	⇨	3%

ITPs: Total student visas approved by sector, YTD



ITPs: YTD 2016 Sector breakdown of TSV

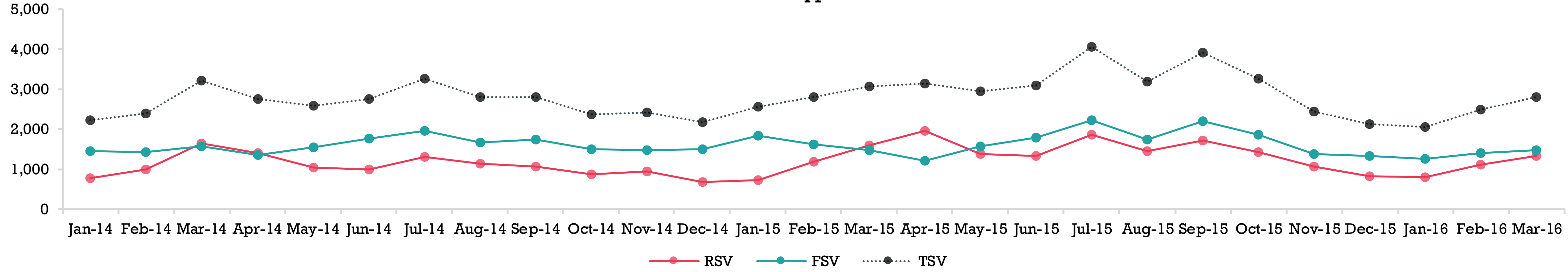


Key takeaways:

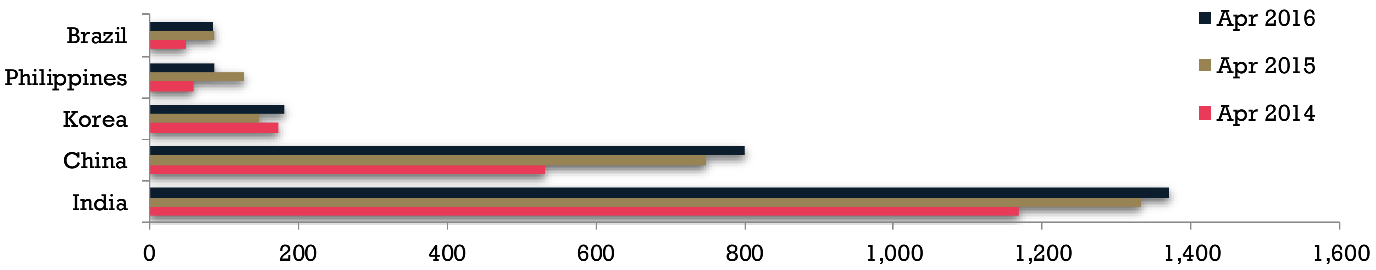
- A promising month in April has resulted in the number of FSV approved for the ITP sector to increase YTD (+4%, +101). TSV remain stable (+3%, +139).
- The majority of students in the ITP sector are Indian and Chinese (74% YTD).
- In April, increases were seen for FSV in ITPs within most NZ regions, in particular: Auckland (+60), Southland (+42) and Waikato (+36).

Private Training Establishments (PTEs):

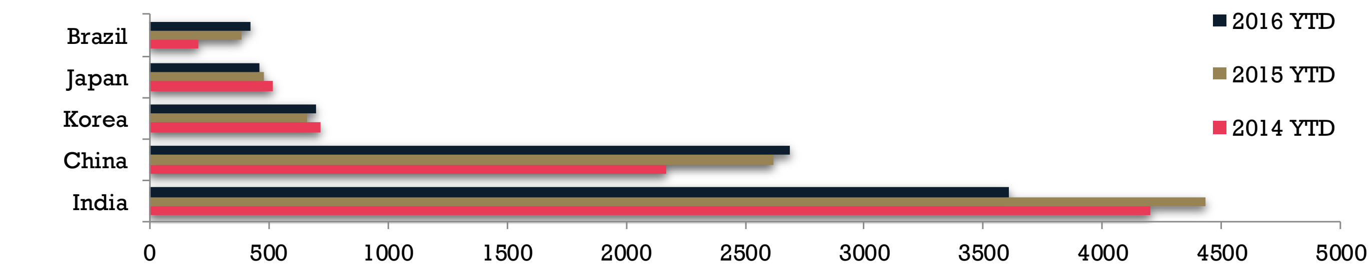
PTEs: student visas approved 2014-2016



PTEs: Total student visas approved by sector, April

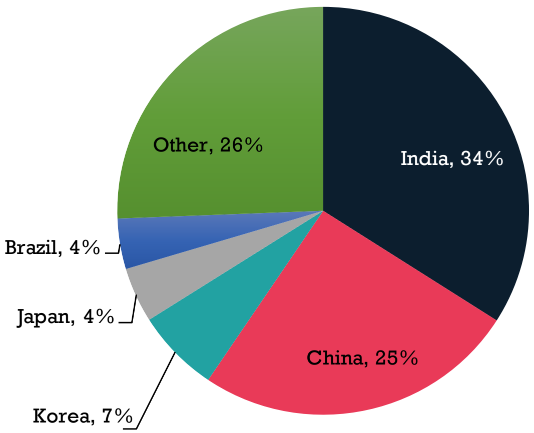


PTEs: Total student visas approved by sector, YTD



April RSV		April FSV		April TSV	
65	3%	24	2%	89	3%
YTD RSV		**YTD FSV**		**YTD TSV**	
-213	-4%	-768	-13%	-981	-8%

PTEs: YTD 2016 Sector breakdown of TSV

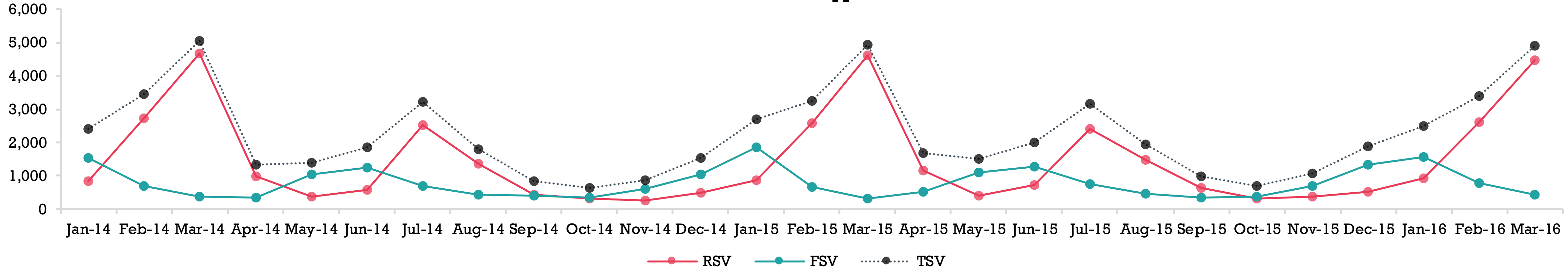


Key takeaways:

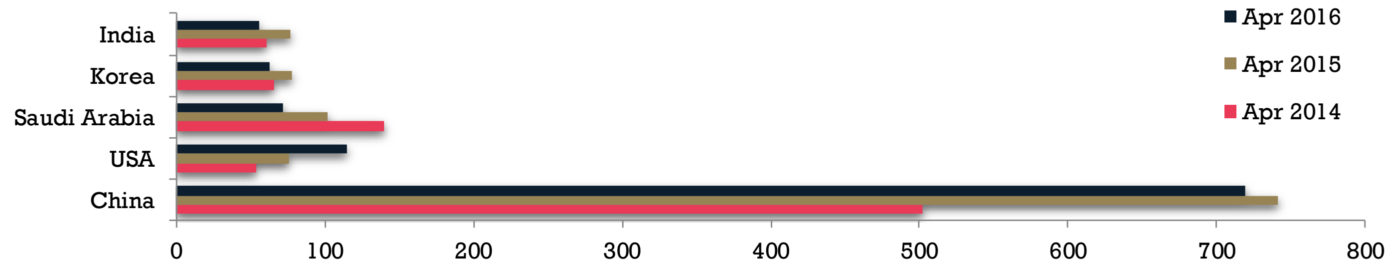
- TSV for the PTEs sector continue to decrease YTD (-8% , -981). This is largely being driven by the decline in FSV approved for students from India and the Philippines (-1,009 YTD) following changes to the English language requirements (Rule 18) in 2015.
- Hawke's Bay region has seen an increase in FSV approved for PTEs YTD (+90%, +43).

Universities:

Universities: student visas approved 2014-2016

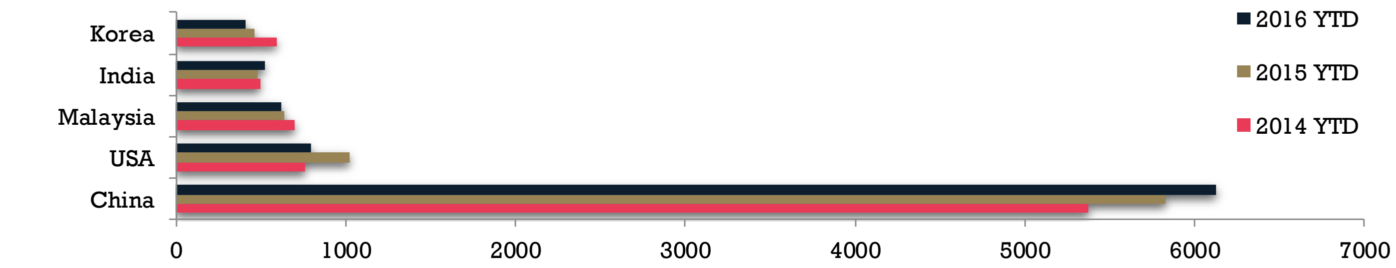


Universities: Total student visas approved by sector, April

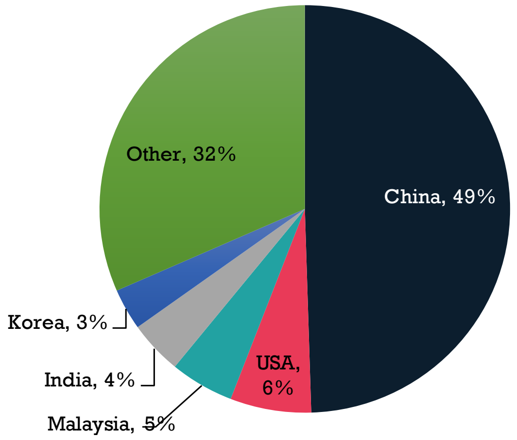


April RSV			April FSV			April TSV		
48	⇧	4%	-131	⇩	-25%	-83	⇩	-5%
YTD RSV			**YTD FSV**			**YTD TSV**		
-22	⇨	0%	-188	⇩	-6%	-210	⇨	-2%

Universities: Total student visas approved by sector, YTD



Universities: YTD 2016 Sector breakdown of TSV



Key takeaways:

- YTD results for the university sector remain stable (-2%, -210). There were 188 fewer FSV approved YTD for the university sector, being driven by the USA , Chinese and Brazilian markets which are all down compared to 2015 YTD.
- China makes up just under half of all TSV approved YTD (49%) for the university sector.

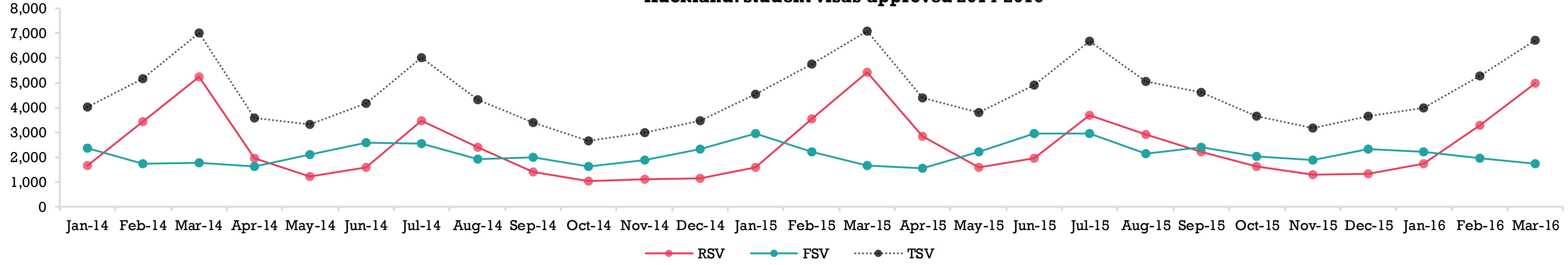
Trends by region

Auckland:

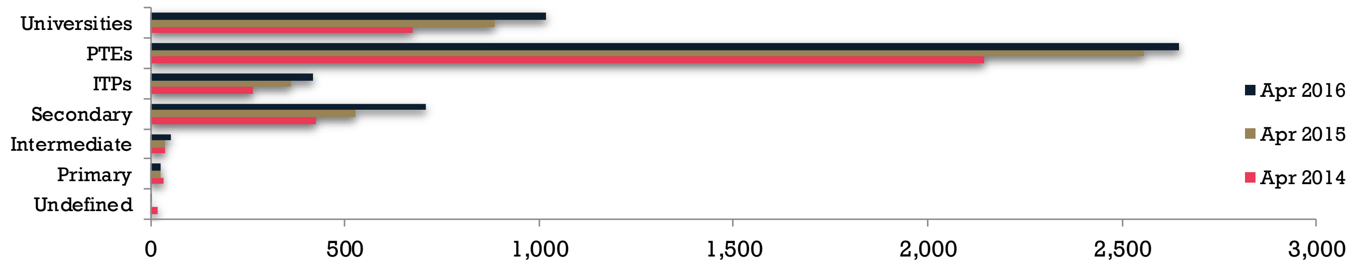
April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
463 16%	15 1%	478 11%	-53 0%	-868 -10%	-921 -4%

YTD (April)

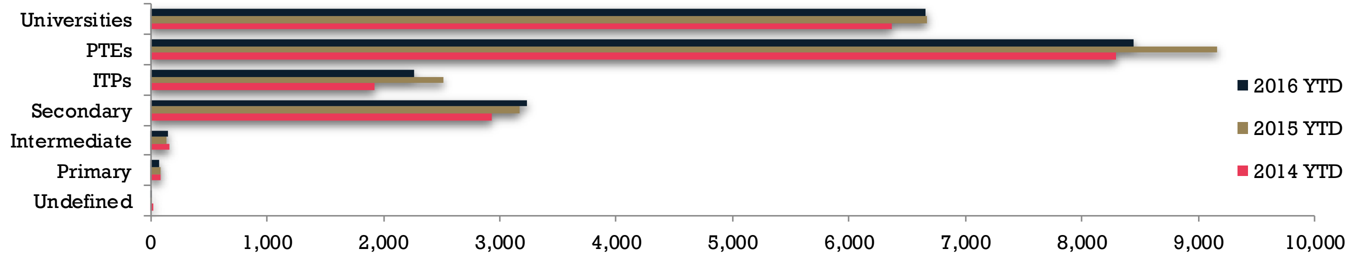
Auckland: student visas approved 2014-2016



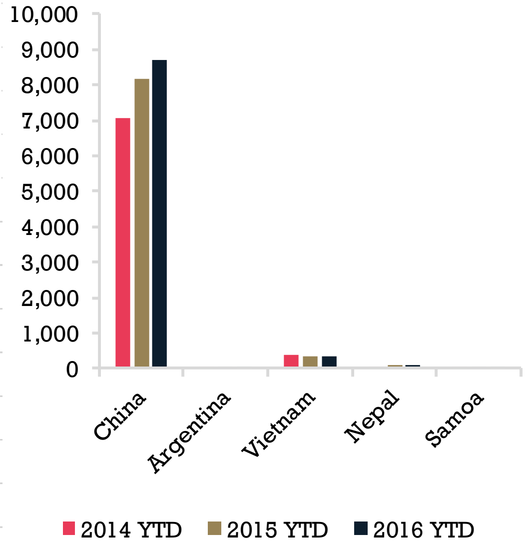
Auckland: Total student visas approved by sector, April



Auckland: Total student visas approved by sector, YTD



Auckland: YTD top five market shifts (TSVs)



Top FSV shifts

April FSV	Change	% change
India	34	8%
Korea	24	27%
Vietnam	20	250%
Chile	-15	-52%
China	-24	-6%
Philippines	-48	-47%

FSVs YTD	Change	% change
Argentina	37	185%
Vietnam	32	56%
Korea	29	6%
USA	-76	-26%
Philippines	-176	-42%
India	-755	-26%

Key takeaways:

- The Auckland region has seen a decline in TSV down 4% (-921) being driven by a drop in FSV approved for Indian and Filipino students YTD (-931) as a result of the change in English language requirements (Rule 18) in 2015.
- Growth in FSV YTD was from Argentina (+37), Vietnam (+32) and Korea (+29).

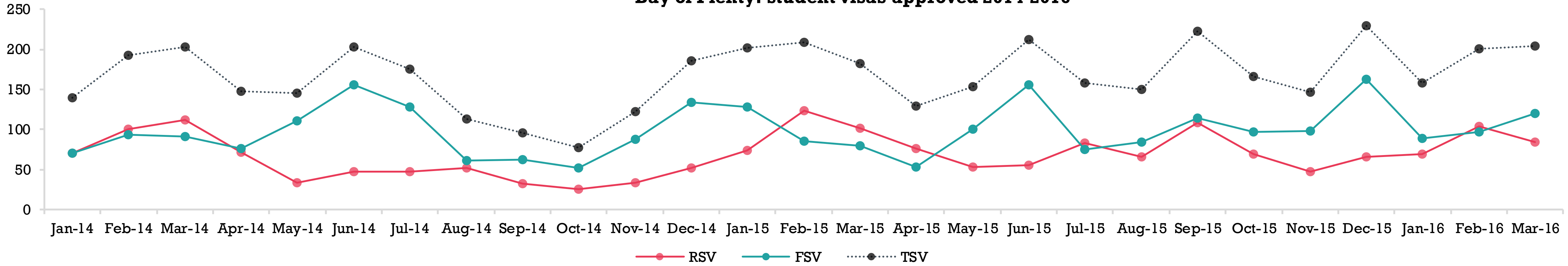
Bay of Plenty:

April RSV		April FSV		April TSV	
44	↑ 58%	41	↑ 77%	85	↑ 66%

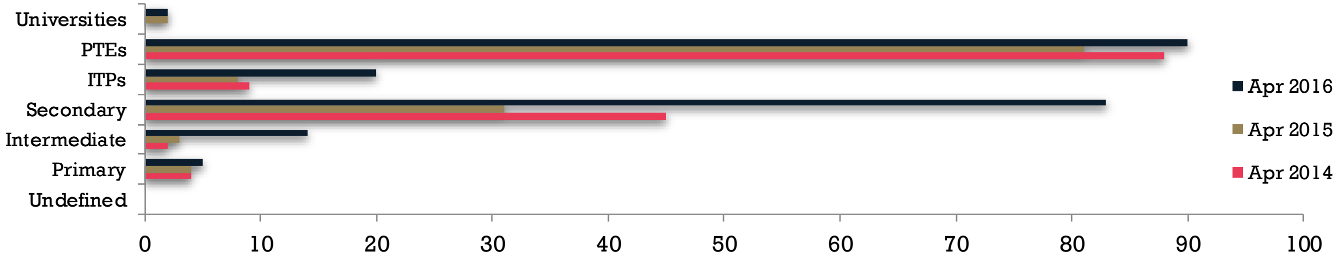
YTD (April)

YTD RSV		YTD FSV		YTD TSV	
2	⇨ 1%	53	↑ 15%	55	↑ 8%

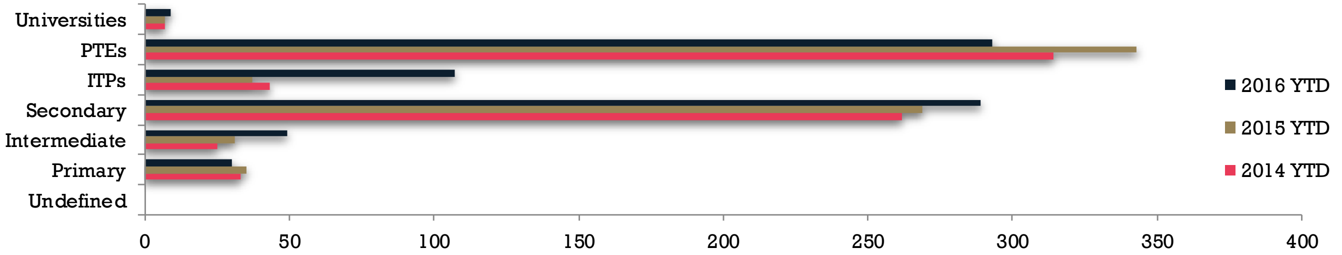
Bay of Plenty: student visas approved 2014-2016



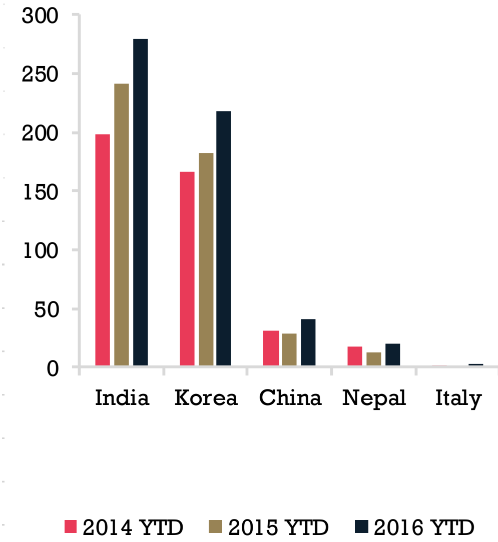
Bay of Plenty: Total student visas approved by sector, April



Bay of Plenty: Total student visas approved by sector, YTD



Bay of Plenty: YTD top five market shifts (TSVs)



Top FSV shifts

April FSV	Change	% change
Korea	30	375%
India	14	82%
China	3	100%
Chile	-2	-100%
Philippines	-3	-60%
Nepal	-4	-100%

FSVs YTD	Change	% change
Korea	34	56%
India	30	23%
Japan	10	91%
Sri Lanka	-4	-100%
Bangladesh	-7	-78%
Brazil	-22	-69%

Key takeaways:

- TSV approved for Bay of Plenty are up YTD (+8%, +55) due to a strong April which saw FSV increase by 77% (+41) and RSV increase by 58% (+44).
- Growth in FSV YTD were seen from: Korea, India and Japan.

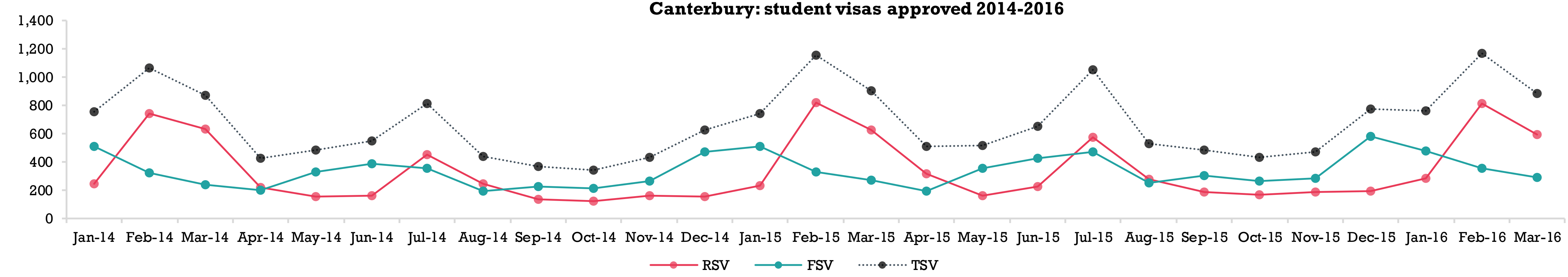
NEW ZEALAND IMMIGRATION

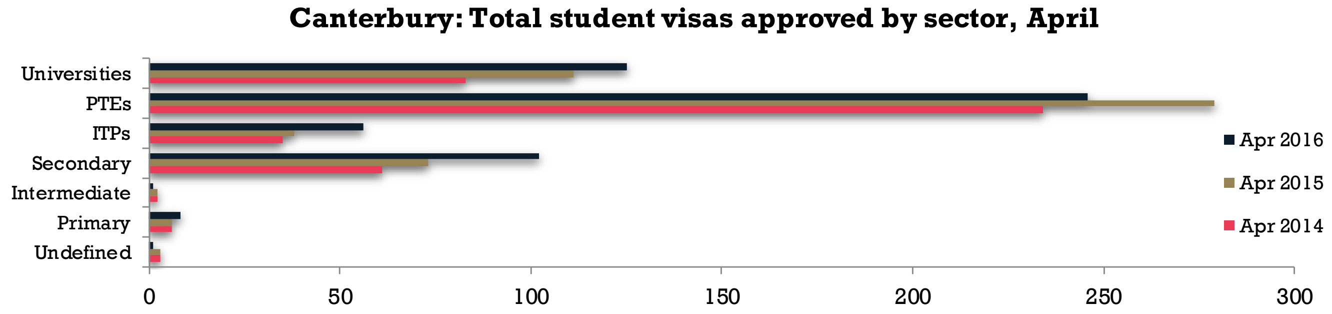
NEW ZEALAND EDUCATION ThinkNew

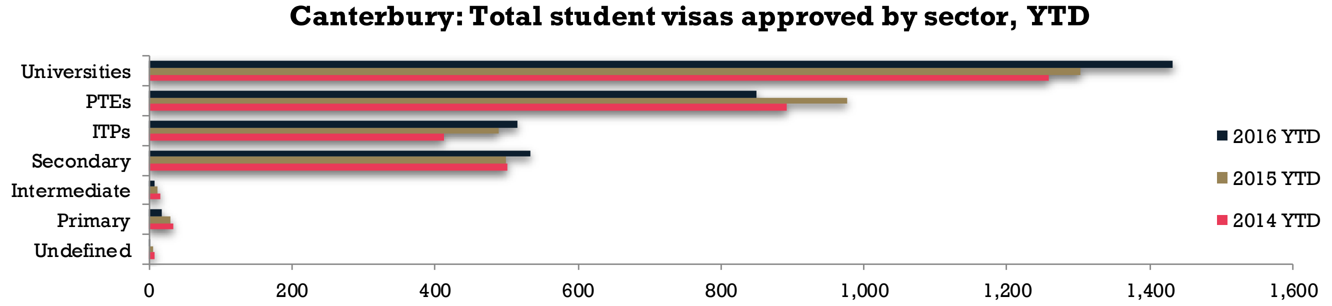
Canterbury:

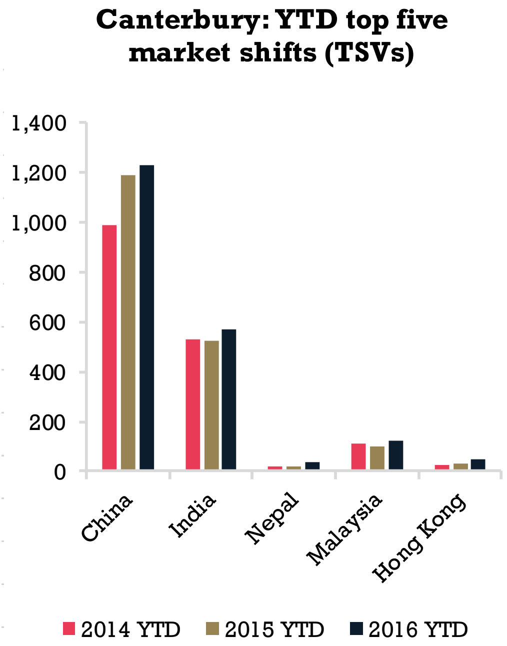
YTD (April)

April RSV		April FSV		April TSV		YTD RSV		YTD FSV		YTD TSV	
6	2%	21	11%	27	5%	12	1%	31	2%	43	1%









Top FSV shifts

April FSV	Change	% change
USA	7	58%
China	6	18%
India	6	11%
Fiji	-3	-100%
Netherlands	-3	-100%
Taiwan	-3	-75%

FSVs YTD	Change	% change
India	54	18%
Malaysia	20	67%
Nepal	15	300%
Thailand	-15	-31%
Korea	-21	-39%
USA	-36	-26%

Key takeaways:

- Canterbury results remain stable YTD, compared to 2015 YTD. FSV saw an increase in April, up 11%, +21. Growth in FSV during April were from: USA, China and India.
- The university sector in Canterbury continues to be the largest sector (43%) and experienced a 10% increase in TSV approved YTD (+129). Secondary schools and ITPs in the Canterbury region have also seen an increase in TSV YTD (+7% and +5% respectively).

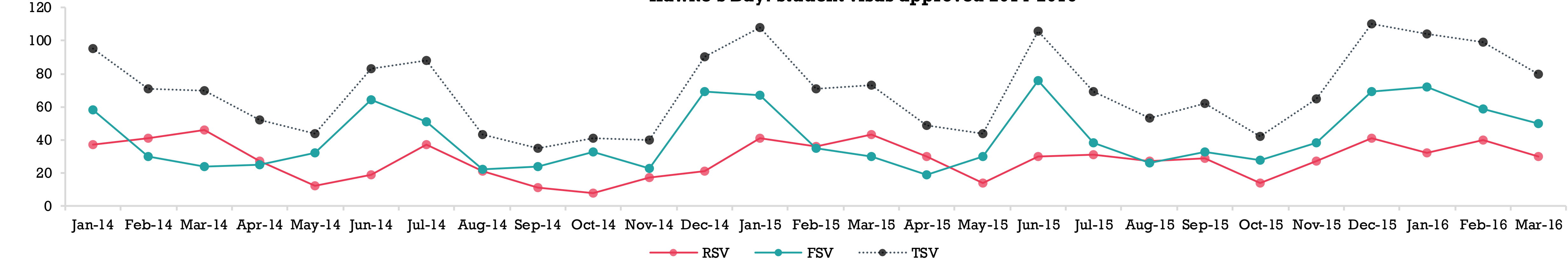
Hawke's Bay:

April RSV		April FSV		April TSV	
29	↑ 97%	17	↑ 89%	46	↑ 94%

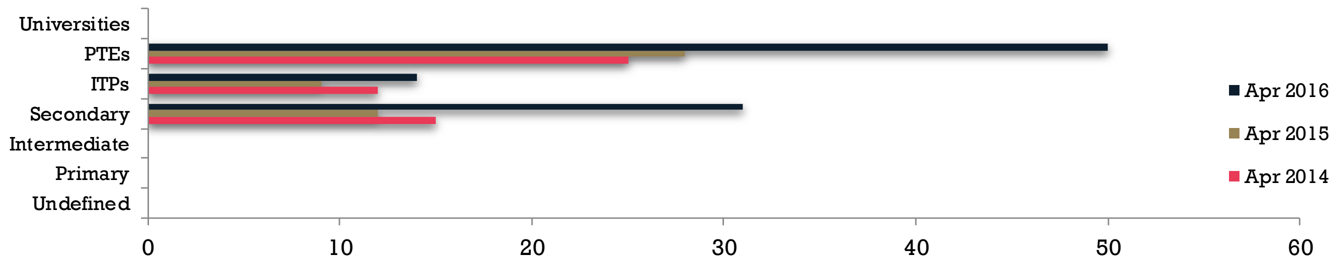
YTD RSV		YTD FSV		YTD TSV	
11	↑ 7%	66	↑ 44%	77	↑ 26%

YTD (April)

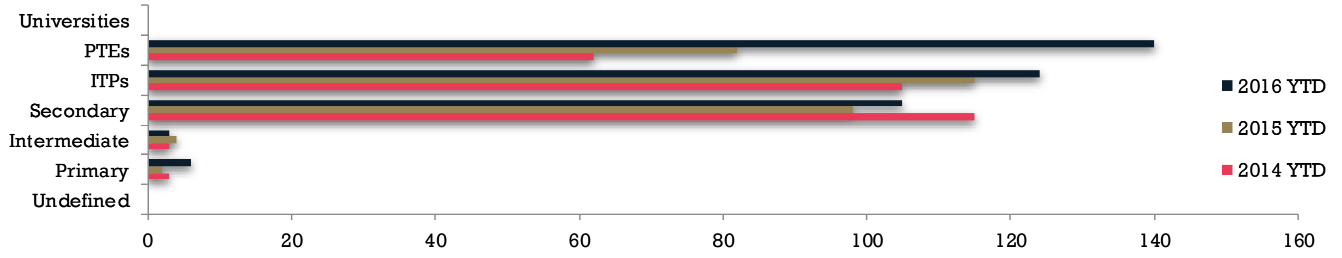
Hawke's Bay: student visas approved 2014-2016



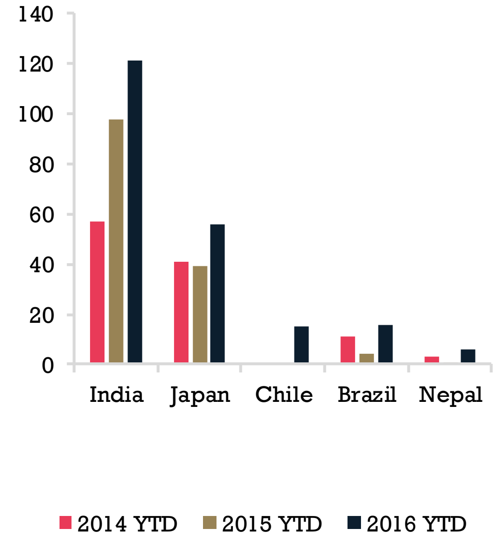
Hawke's Bay: Total student visas approved by sector, April



Hawke's Bay: Total student visas approved by sector, YTD



Hawke's Bay: YTD top five market shifts (TSVs)



Top FSV shifts

April FSV	Change	% change
Brazil	4	-
Chile	3	-
China	3	-
Sri Lanka	-1	-100%
Germany	-3	-50%
India	-3	-33%

FSVs YTD	Change	% change
Japan	19	136%
Chile	15	-
Brazil	11	275%
USA	-1	-50%
Hong Kong	-2	-100%
Singapore	-2	-100%

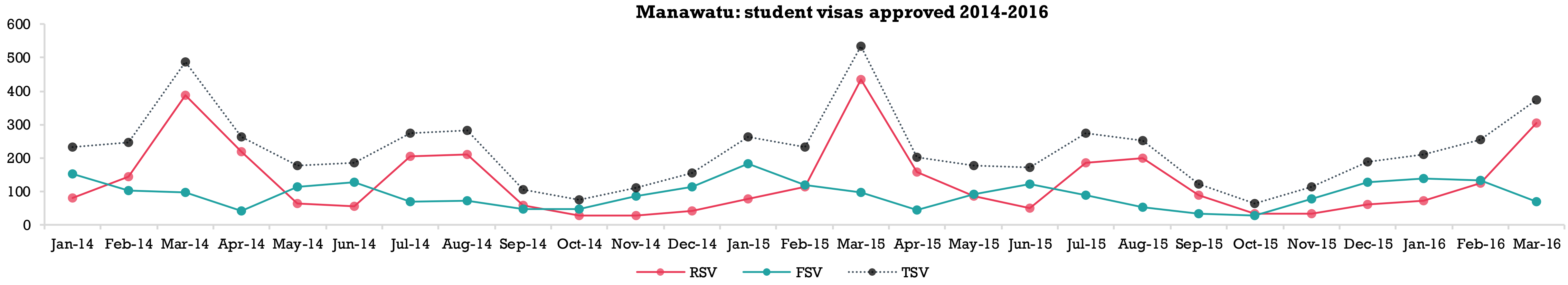
Key takeaways:

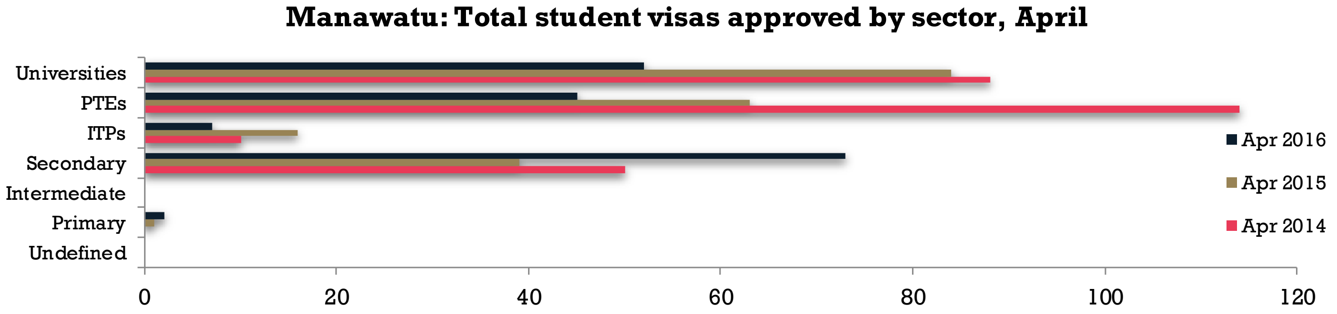
- Results are positive in Hawke’s Bay, with a 26% increase in FSV seen YTD (+77). This is being driven by increases in FSV approved for Japan, Chile and Brazil.
- The largest growth is being felt in the PTE sector (+71%, +58).

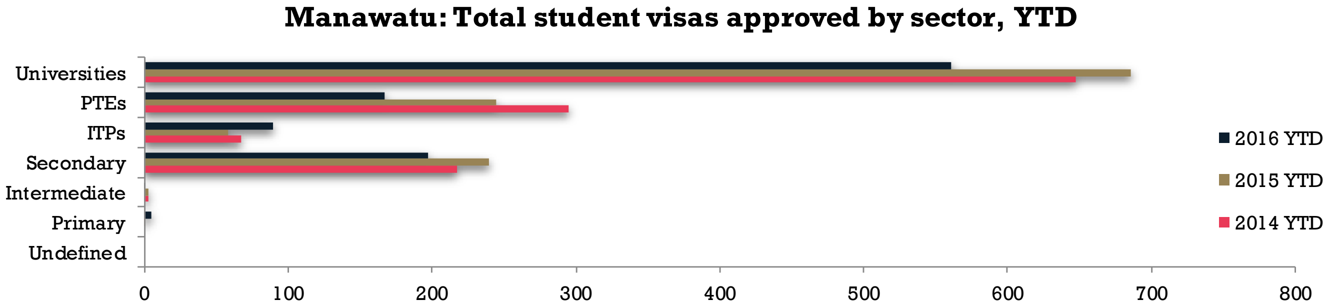
Manawatu:

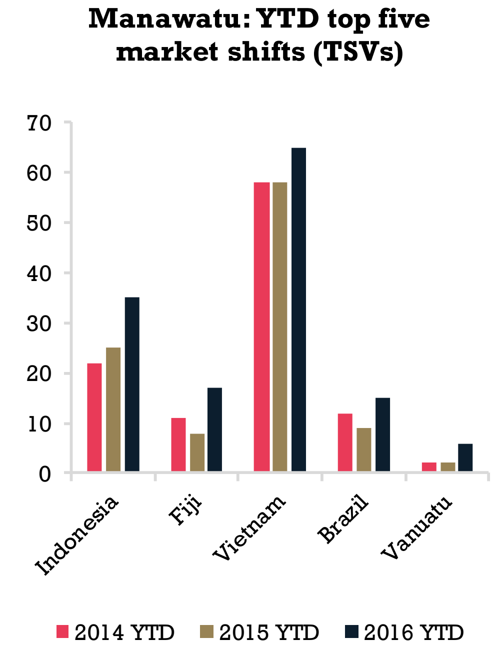
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
-19 ⇩ -12%	-5 ⇩ -11%	-24 ⇩ -12%	-144 ⇩ -18%	-68 ⇩ -15%	-212 ⇩ -17%









Top FSV shifts

April FSV	Change	% change
Japan	6	600%
Vietnam	4	200%
Sri Lanka	3	-
Singapore	-3	-100%
USA	-3	-75%
China	-7	-70%

FSVs YTD	Change	% change
Indonesia	17	283%
Fiji	8	267%
Brazil	6	67%
China	-18	-31%
USA	-27	-50%
Thailand	-56	-86%

Key takeaways:

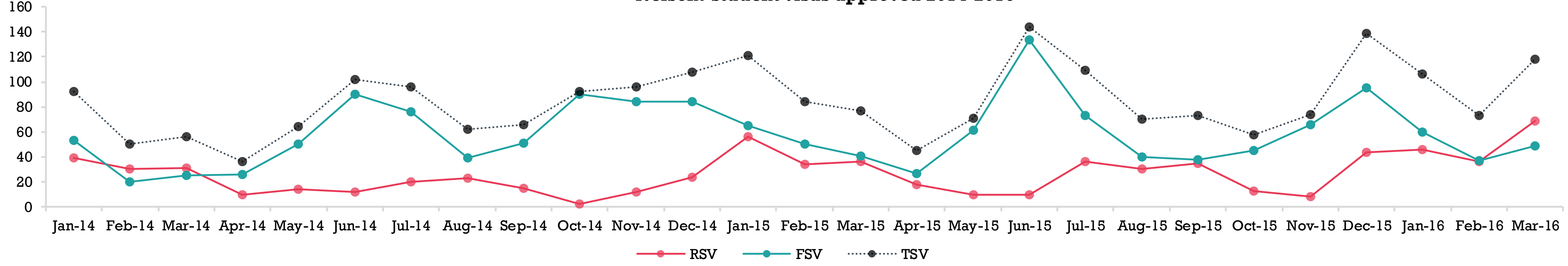
- Results are down across the board for the Manawatu region YTD, with FSV down 15% (-68) and RSV down 18% (-144). The three markets that contributed most to this decline were China, USA and Thailand.
- Despite the overall decline, the ITP sector continues to experience an increase in TSV approved YTD (+53%, +31).

Nelson:

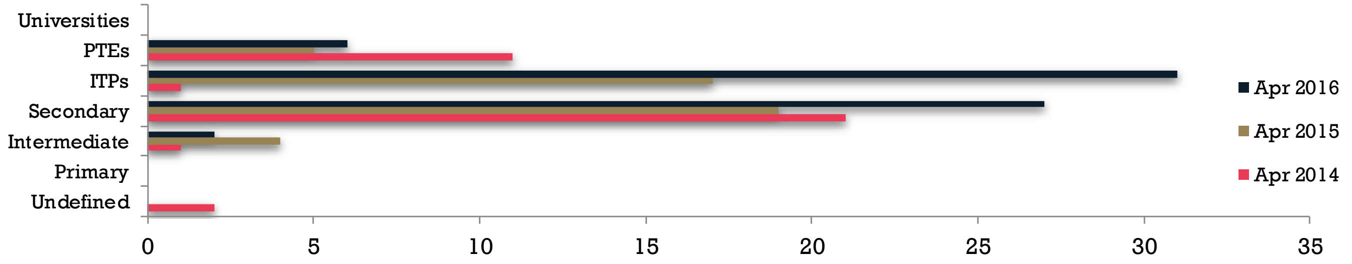
April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
23 ↑ 128%	-2 ↓ -7%	21 ↑ 47%	48 ↑ 33%	-12 ↓ -7%	36 ↑ 11%

YTD (April)

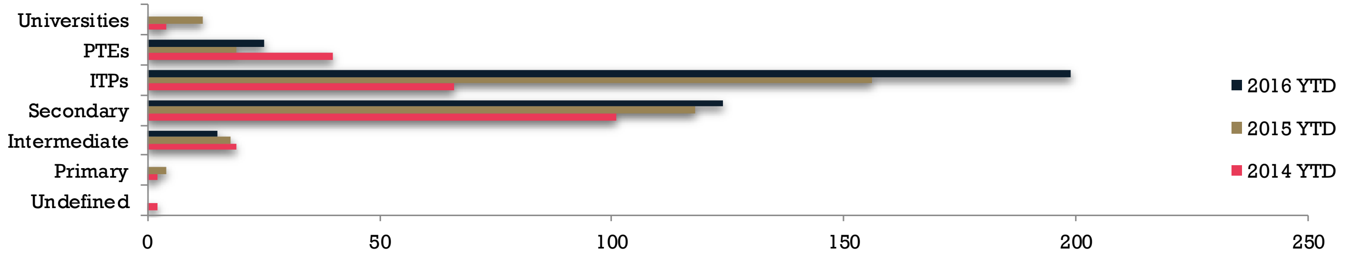
Nelson: student visas approved 2014-2016



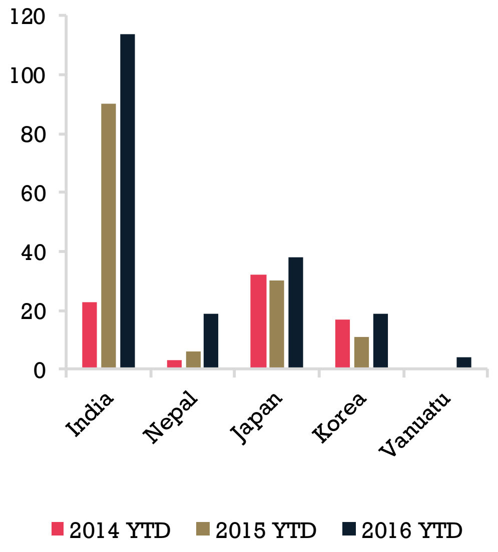
Nelson: Total student visas approved by sector, April



Nelson: Total student visas approved by sector, YTD



Nelson: YTD top five market shifts (TSVs)



Top FSV shifts

April FSV	Change	% change
Hong Kong	3	-
Austria	1	-
Brazil	1	-
China	-2	-100%
Germany	-2	-22%
India	-2	-29%

FSVs YTD	Change	% change
Japan	14	93%
Korea	10	333%
Nepal	5	167%
Fiji	-4	-100%
Thailand	-5	-28%
India	-46	-61%

Key takeaways:

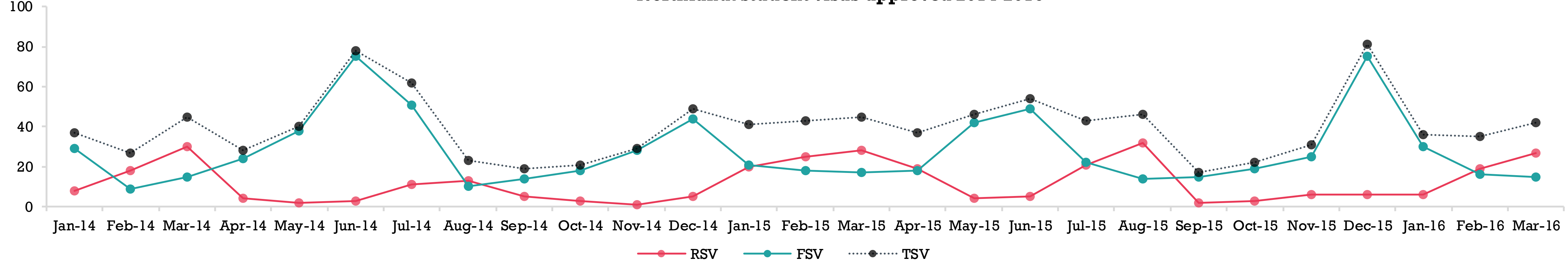
- The Nelson region has experienced a decline in FSV approved YTD (-7%, -12), however a 33% increase in RSV YTD (+48) continues to boost Nelson's overall results. This increase has benefited the ITP sector, with an additional 43 TSV approved YTD (+28%) compared to 2015 YTD.
- Growth in FSV YTD were from: Japan, South Korea and Nepal.

Northland:

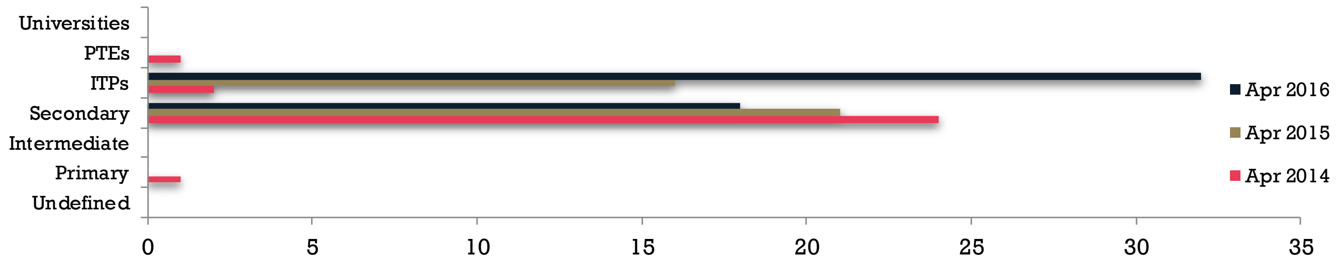
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
24 126%	-11 -61%	13 35%	3 3%	-6 -8%	-3 -2%

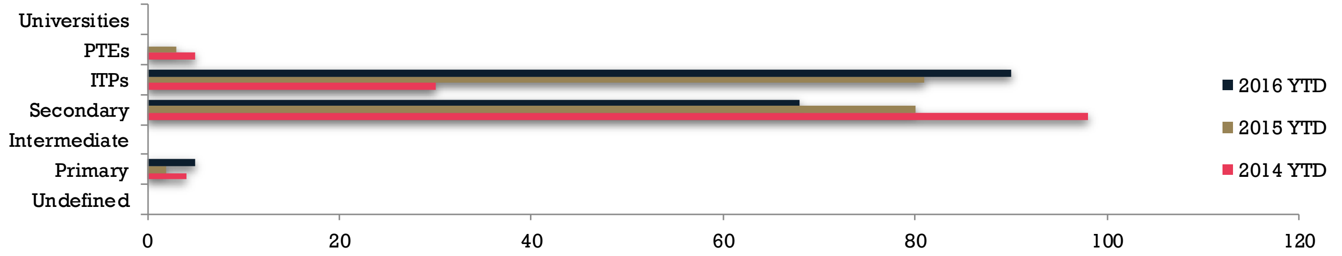
Northland: student visas approved 2014-2016



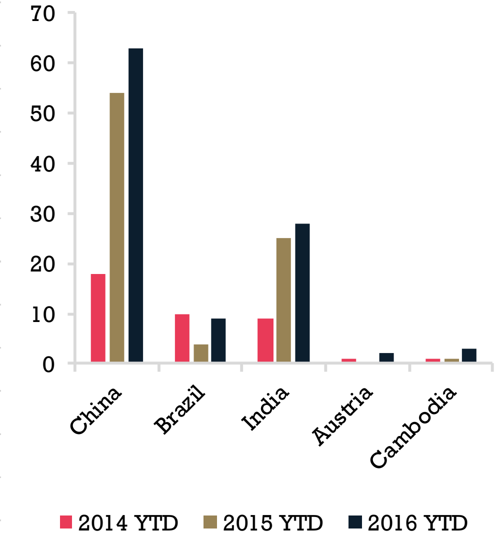
Northland: Total student visas approved by sector, April



Northland: Total student visas approved by sector, YTD



Northland: YTD top five market shifts (TSVs)



Top FSV shifts

April FSV	Change	% change
Austria	1	-
Thailand	1	-
Ukraine	1	-
USA	-1	-100%
Korea	-3	-100%
Germany	-5	-71%

FSVs YTD	Change	% change
China	7	70%
Japan	6	600%
Brazil	5	125%
India	-3	-21%
Thailand	-3	-75%
Germany	-10	-56%

Key takeaways:

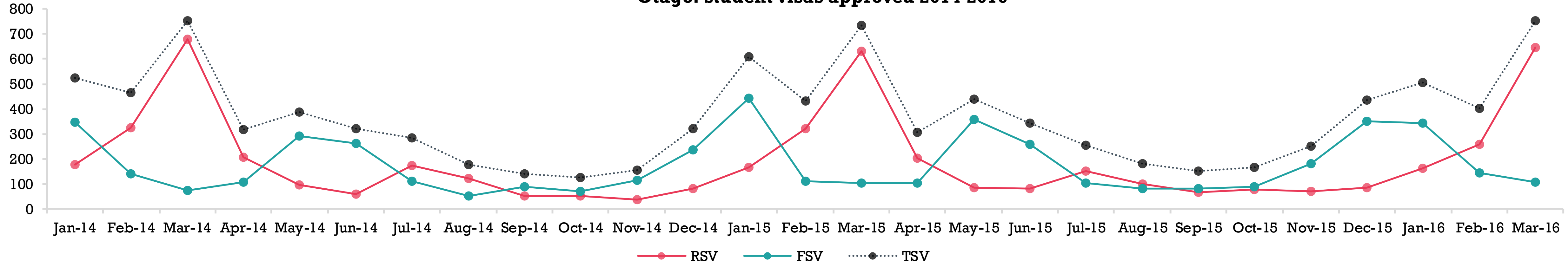
- Northland's results are mixed, with the number of TSV approved remaining stable YTD (-2%, -3). In April, there was a 126% increase in RSV approved (+24), mainly affecting the ITP sector.
- Growth in TSV YTD were from: China (+9), Brazil (+5) and India (+3).

Otago:

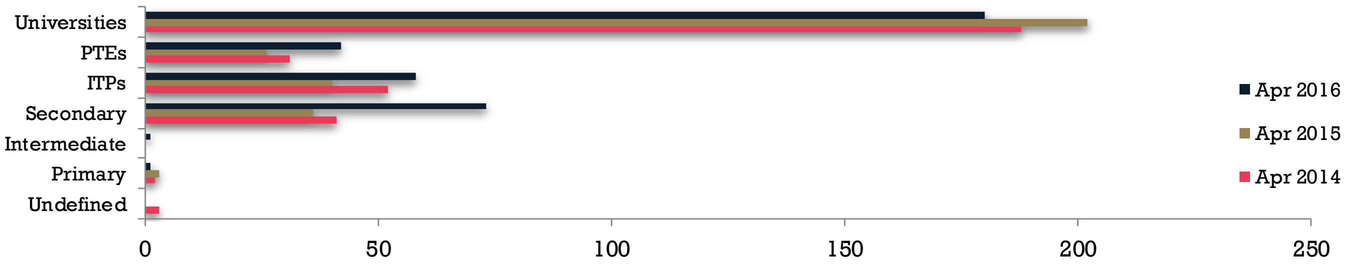
YTD (April)

April RSV		April FSV		April TSV		YTD RSV		YTD FSV		YTD TSV	
-6	-3%	54	52%	48	16%	-56	-4%	-11	-1%	-67	-3%

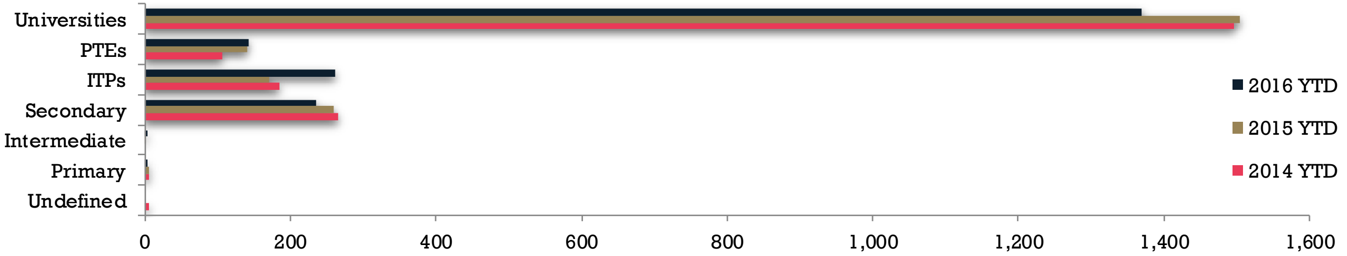
Otago: student visas approved 2014-2016



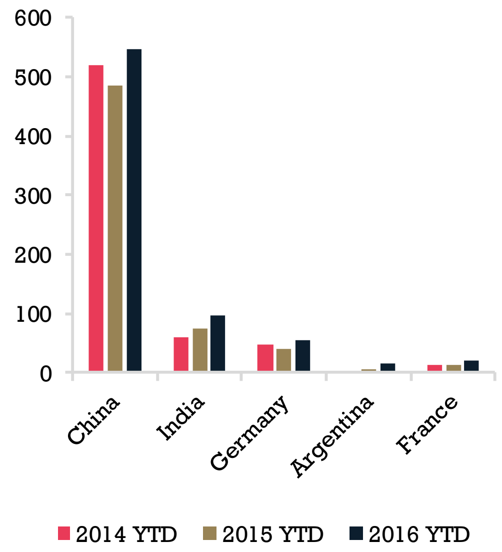
Otago: Total student visas approved by sector, April



Otago: Total student visas approved by sector, YTD



Otago: YTD top five market shifts (TSVs)



Top FSV shifts

April FSV	Change	% change
USA	13	108%
Malaysia	8	267%
China	4	33%
Saudi Arabia	-1	-100%
Taiwan	-1	-100%
Austria	-2	-100%

FSVs YTD	Change	% change
Germany	12	41%
India	12	31%
Thailand	11	32%
Malaysia	-4	-12%
Brazil	-26	-36%
USA	-67	-26%

Key takeaways:

- TSV are down YTD for the Otago region (-3%, -67) but the number of FSV approved in April increased by 52% compared to April 2015 (+54). The markets driving the increase in FSV in April include USA, Malaysia and China.
- ITPs in the Otago region continue to experience strong growth in TSV YTD (+53%, +91) while the university sector has declined slightly (-9%, -136).

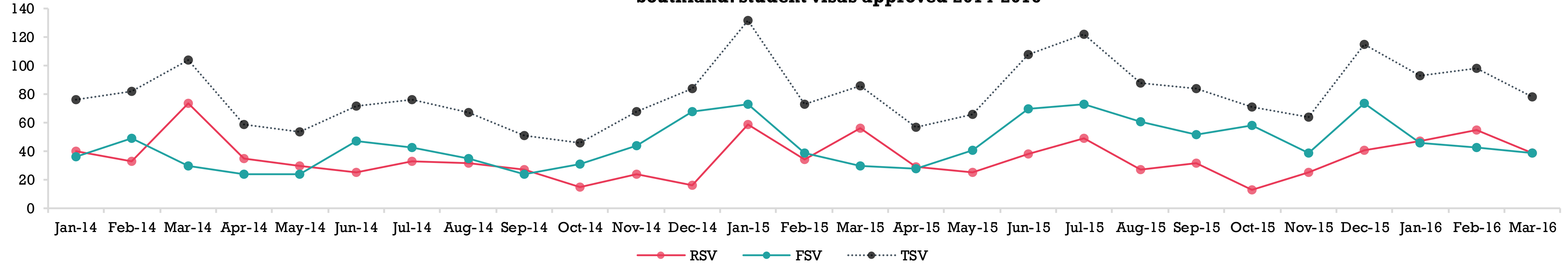
Southland:

YTD (April)

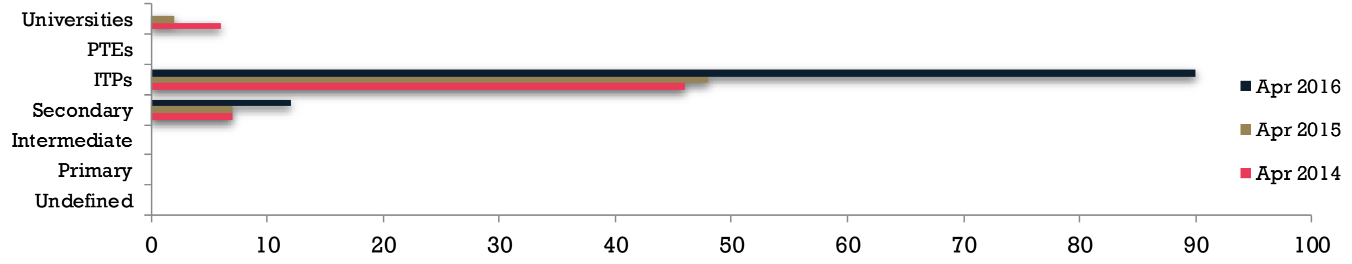
April RSV		April FSV		April TSV	
31	↑ 107%	14	↑ 50%	45	↑ 79%

YTD RSV		YTD FSV		YTD TSV	
23	↑ 13%	0	⇨ 0%	23	↑ 7%

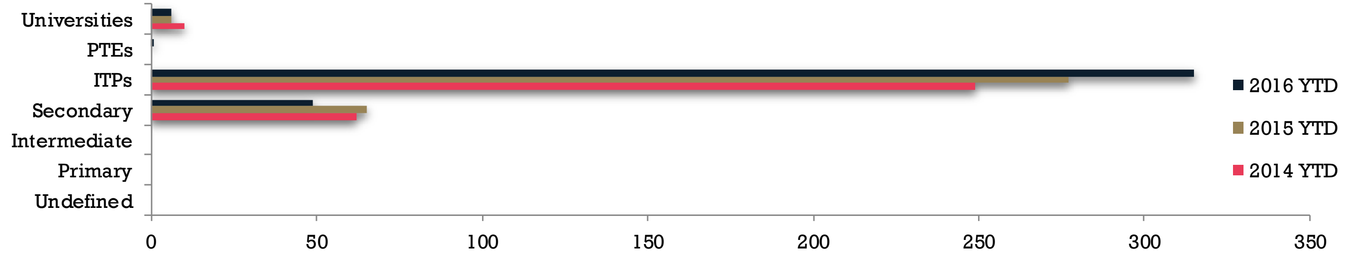
Southland: student visas approved 2014-2016



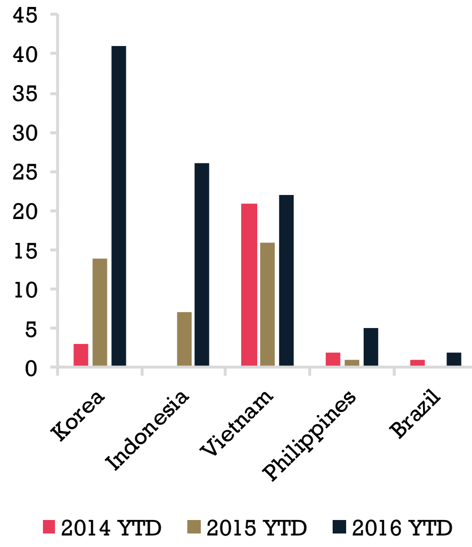
Southland: Total student visas approved by sector, April



Southland: Total student visas approved by sector, YTD



Southland: YTD top five market shifts (TSVs)



Top FSV shifts

April FSV	Change	% change
Korea	10	-
China	7	350%
Brazil	2	-
Russia	-1	-100%
Germany	-4	-100%
India	-6	-75%

FSVs YTD	Change	% change
China	14	82%
Korea	10	83%
Indonesia	7	100%
Thailand	-4	-22%
Germany	-5	-71%
India	-25	-45%

Key takeaways:

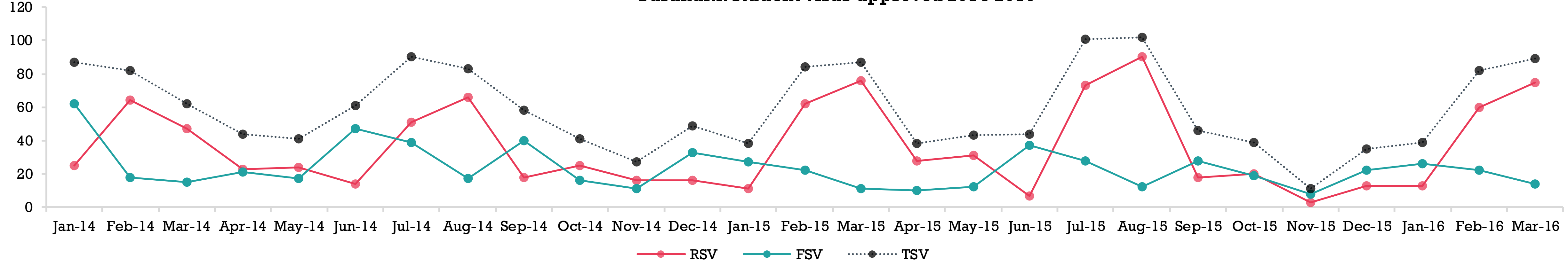
- Southland is experiencing good results YTD, with TSV up 7% (+23).
- This is being driven by a strong month in April with TSV up 79% (+45), with growth mainly felt in the ITP sector and in secondary schools.
- Korea and Indonesia have both seen large increases in TSV approved YTD, in the Southland region.

Taranaki:

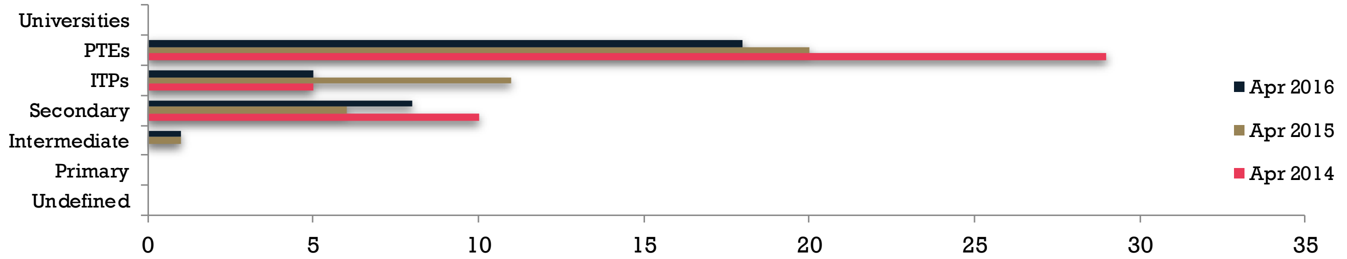
YTD (April)

April RSV		April FSV		April TSV		YTD RSV		YTD FSV		YTD TSV	
-8	-29%	2	20%	-6	-16%	-9	-5%	4	6%	-5	-2%

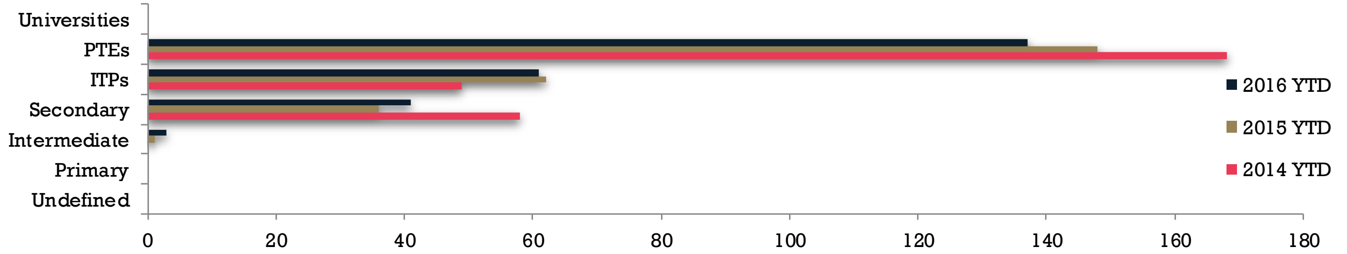
Taranaki: student visas approved 2014-2016



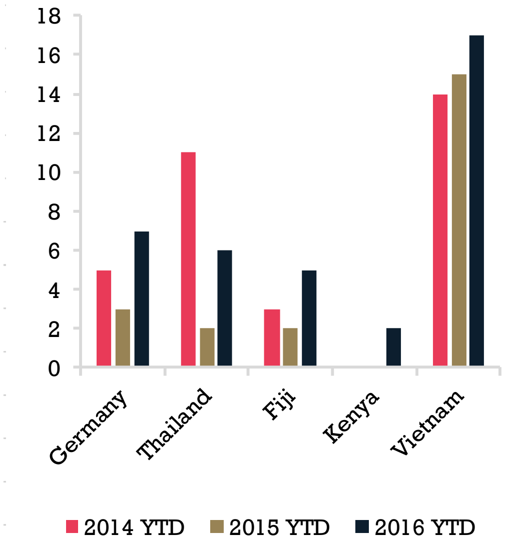
Taranaki: Total student visas approved by sector, April



Taranaki: Total student visas approved by sector, YTD



Taranaki: YTD top five market shifts (TSVs)



Top FSV shifts

April FSV	Change	% change
Germany	2	200%
China	1	-
Fiji	1	-
Vanuatu	1	-
Philippines	-1	-100%
India	-3	-38%

FSVs YTD	Change	% change
China	4	67%
Germany	3	100%
Japan	3	300%
Philippines	-2	-100%
Russia	-3	-60%
India	-9	-22%

Key takeaways:

- Taranaki's results remain stable, with relatively no change compared to the same period last year (-2%, -5).
- The highest number of TSV approvals YTD were for the PTE sector, followed by ITPs and secondary schools.

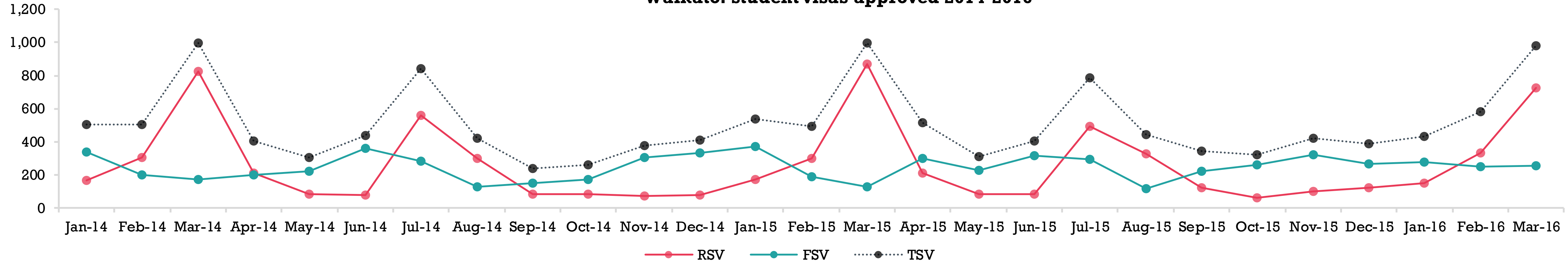
Waikato:

YTD (April)

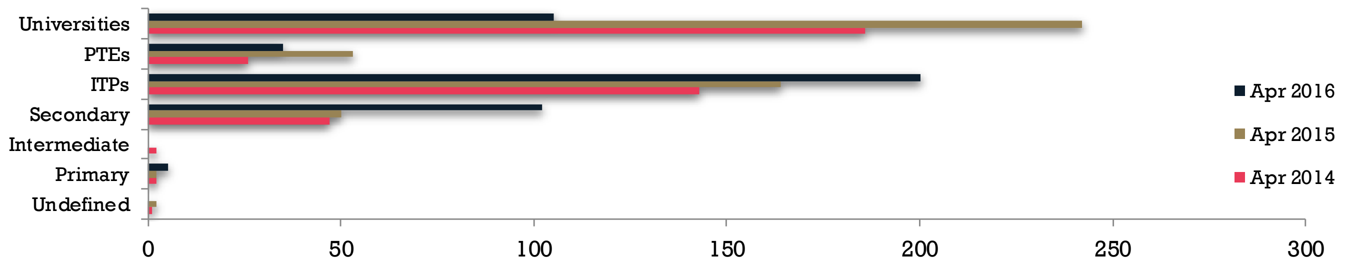
April RSV			April FSV			April TSV		
94	⇧	44%	-160	⇩	-53%	-66	⇩	-13%

YTD RSV			YTD FSV			YTD TSV		
-35	⇨	-2%	-66	⇩	-7%	-101	⇨	-4%

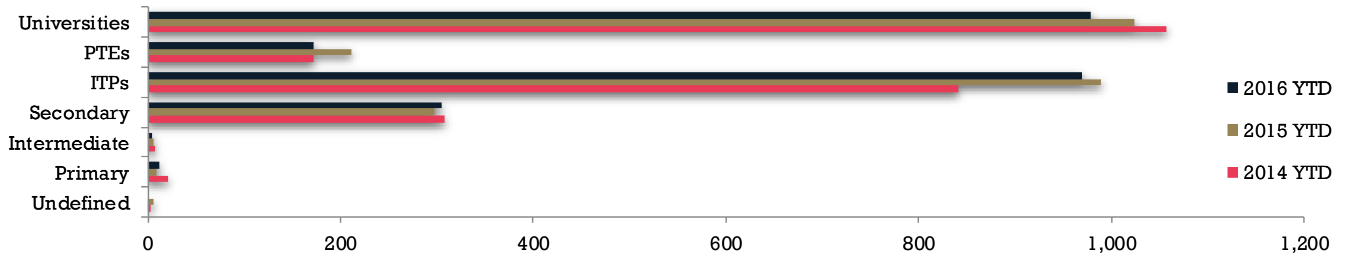
Waikato: student visas approved 2014-2016



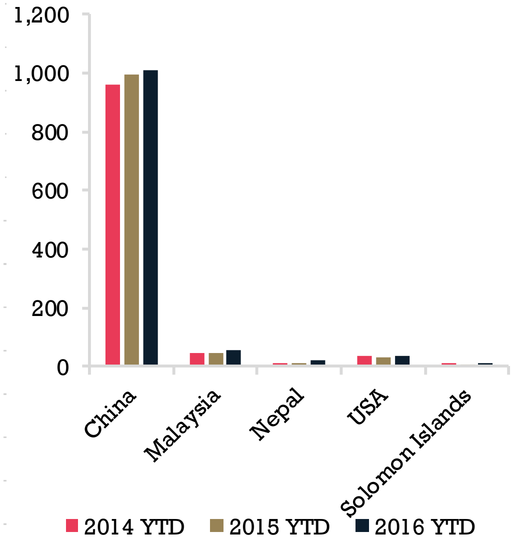
Waikato: Total student visas approved by sector, April



Waikato: Total student visas approved by sector, YTD



Waikato: YTD top five market shifts (TSVs)



Top FSV shifts

April FSV	Change	% change
USA	5	500%
Chile	2	-
Hong Kong	2	100%
Great Britain	-4	-24%
France	-7	-100%
China	-141	-82%

FSVs YTD	Change	% change
Thailand	12	100%
Malaysia	11	157%
Philippines	8	23%
Korea	-15	-54%
Great Britain	-18	-22%
China	-24	-10%

Key takeaways:

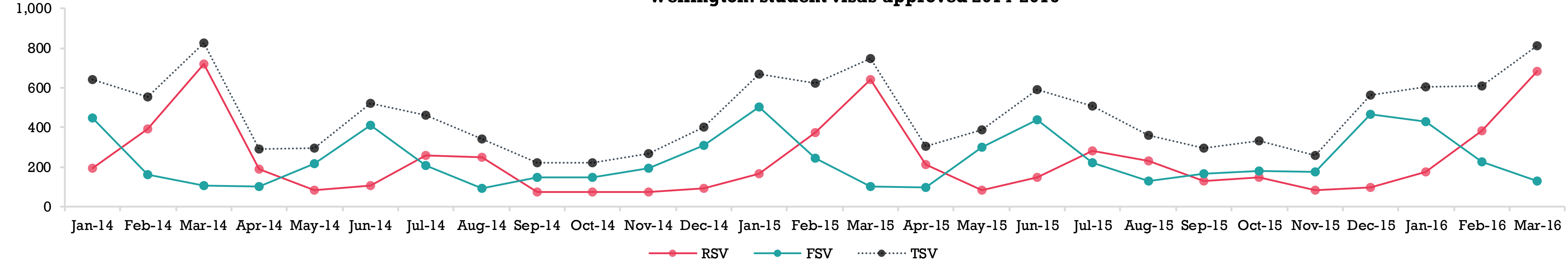
- FSV for the Waikato region are down 53% (-160) this April which is being driven by a decline in FSV from China and is mainly affecting the university sector in Waikato.
- However further analysis shows this is likely due to visas being applied for/approved earlier, as March 2016 saw a 98% increase in FSV (+127) for the Waikato region, also driven by China.

Wellington:

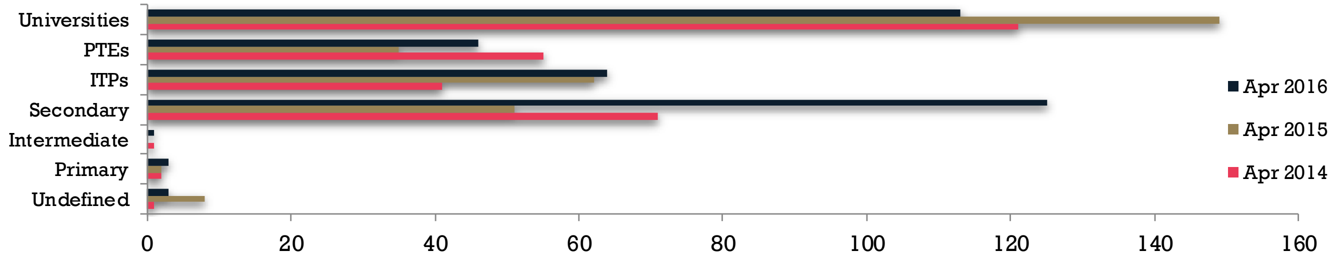
YTD (April)

April RSV	April FSV	April TSV	YTD RSV	YTD FSV	YTD TSV
29 ↑ 14%	19 ↑ 20%	48 ↑ 16%	83 ↑ 6%	-49 ↓ -5%	34 → 1%

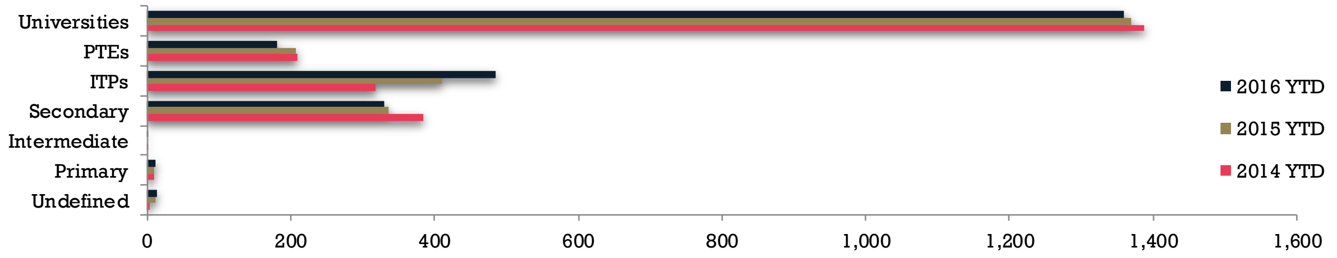
Wellington: student visas approved 2014-2016



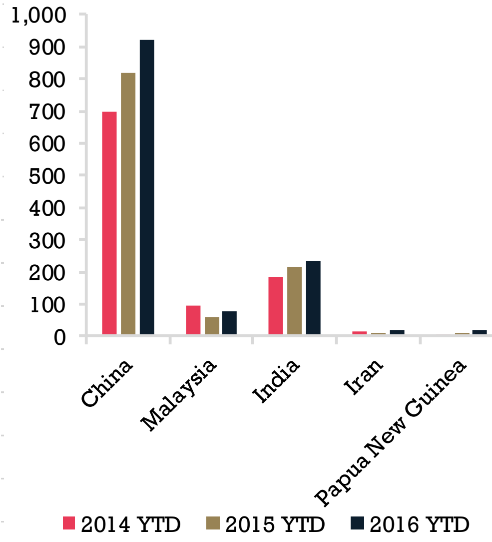
Wellington: Total student visas approved by sector, April



Wellington: Total student visas approved by sector, YTD



Wellington: YTD top five market shifts (TSVs)



Top FSV shifts

April FSV	Change	% change
Korea	12	-
USA	6	75%
Thailand	5	125%
Spain	-2	-100%
Fiji	-6	-100%
Great Britain	-8	-89%

FSVs YTD	Change	% change
Malaysia	22	183%
Thailand	16	80%
Korea	10	53%
Brazil	-16	-44%
Peru	-17	-100%
USA	-50	-30%

Key takeaways:

- Overall results for Wellington remain stable (+1%, +34) although the region continues to see improvements for FSV (+20%, +19) and RSV (+14%, +29) in April 2016. Markets contributing to the increase in FSV this April include Korea, USA and Thailand.
- TSV approved for the ITP sector continues to increase YTD, and secondary schools saw a large increase this April compared to April 2015 (+145%, +74).