

# Student Visa Dashboard

## January 2015

### Overall



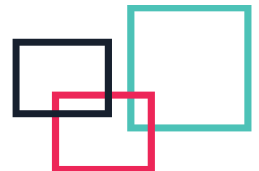
# Introduction

- *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 is the most immediate/instantaneous 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 or leaving New Zealand to study, which can be used as a predictor for 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 visas as an indicator of growth as it represents new students and the pipeline of students entering New Zealand.*
- *Total student visas gives us an overview of all student visas (ie: first time student visas and students re-issuing their visas).*
- *We can analyse the retention of students by subtracting first-time student visas from total student visas.*

# Caveats and notes



- Student visas vs. visitor visas:
  - Total student visas (TSV), first time student visas (FSV), and renewed student visas (RSV) 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 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.
  - This will impact the Private Training Establishments (including English Language Schools) numbers.
- Student visas vs. enrolments:
  - There is potential delay of up to three months between students having their visas approved and actual entry into New Zealand, therefore the figures shown here may not necessarily represent the actual number of students currently in New Zealand.
- Work in progress:
  - ENZ is currently working on:
    - Understanding the true demand of student visas – ie: TSV applications vs. TSVs approved
    - Understanding the correlation between ENZ activity and policy changes on FSV trends
    - Understanding the impact of RSV on overall trends. Further discussion will be required on the ownership and responsibility for retaining these students
    - Further work is being undertaken to understand a relatively large number of “not recorded” entries for FSVs at the provider level
    - Further analysis is being undertaken on understanding the correlation between student visas and enrolments



# How to read the dashboard

ThinkNew®

Name of the market/region

Overall indicator of the overall performance of the market

Overall: 

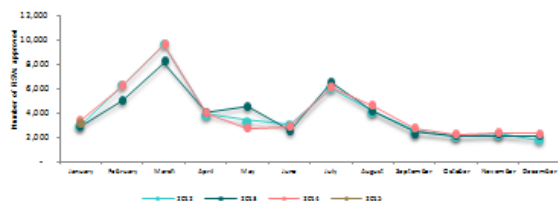
Overall: Total student visas (TSV) 2012 - 2015



Overall: First time student visas (FSV) 2012 - 2015



Overall: Renewed student visas (RSV) 2012 - 2015



These graphs show a monthly trend of actual visa numbers from 2011 - 2015

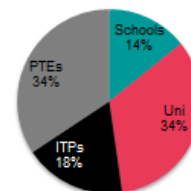
Key trends or interesting trends to consider

## Takeaways:

- TSVs and FSVs for January show a strong start for the 2015 academic year
- There has been a relatively healthy sector split of students in January

| January RSV | January FSV | January TSV |
|-------------|-------------|-------------|
| -196        | 1,057       | 861         |
| -6%         | 22%         | 10%         |

January 2015 sector breakdown of FSVs



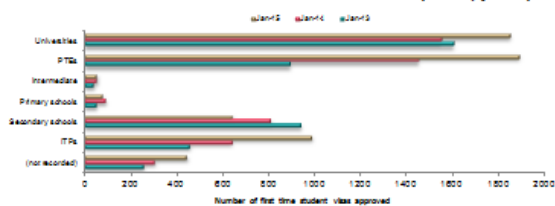
The monthly result:

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

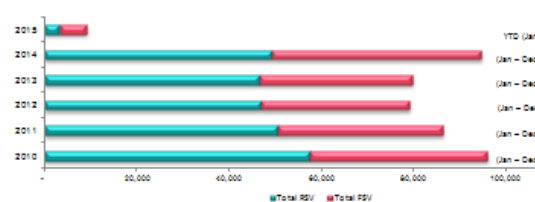
This pie graph represents the sector distribution of FSVs YTD.

Shows the Monthly sector performance of actual FSVs numbers.

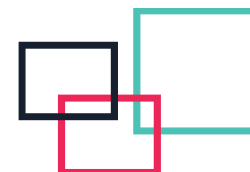
Overall: First time student visas issued by sector, January



Overall: Cumulative total for RSV vs. FSV 2010 - 2015



Shows the calendar year results for FSV + 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.



# Key trends

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## January:

- Following from a strong finish to 2014, total student visa (TSVs) approvals continued to grow into the 2015 academic year up 10% (861) on January 2014.
- The growth was driven by India up 47% (666), the United States of America up 44% (246) and China up 6% (104).
- First time student visas (FSVs) were up 22% (1,057). This was driven by India up 65% (720), the United States of America up 50% (258), Japan up 32% (49), Colombia up 142% (44).
- The PTE sector grew by 30% (439), ITPs grew by 55% (351) and universities grew by 20% (304).
- The secondary school sector experienced a relatively significant decline due to a reduction in Latin American scholarship students when compared to previous years.

Increases

| TSVs for January | Change | % change |
|------------------|--------|----------|
| India            | 666    | 47%      |
| USA              | 246    | 44%      |
| China            | 104    | 6%       |
| Thailand         | 88     | 22%      |
| Colombia         | 47     | 109%     |

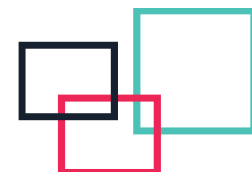
| FSVs for January | Change | % change |
|------------------|--------|----------|
| India            | 720    | 65%      |
| USA              | 258    | 50%      |
| Japan            | 49     | 32%      |
| Colombia         | 44     | 142%     |
| China            | 36     | 5%       |

| Sector FSVs for January | Change | % change |
|-------------------------|--------|----------|
| PTEs                    | 439    | 30%      |
| ITPs                    | 351    | 55%      |
| University              | 304    | 20%      |
| Intermediate            | 0      | 0%       |
| Primary school          | -13    | -14%     |
| Secondary school        | -166   | -20%     |

Decreases

|              |     |      |
|--------------|-----|------|
| Samoa        | -31 | -55% |
| Korea        | -36 | -8%  |
| Brazil       | -48 | -13% |
| Saudi Arabia | -84 | -37% |
| Chile        | -84 | -59% |

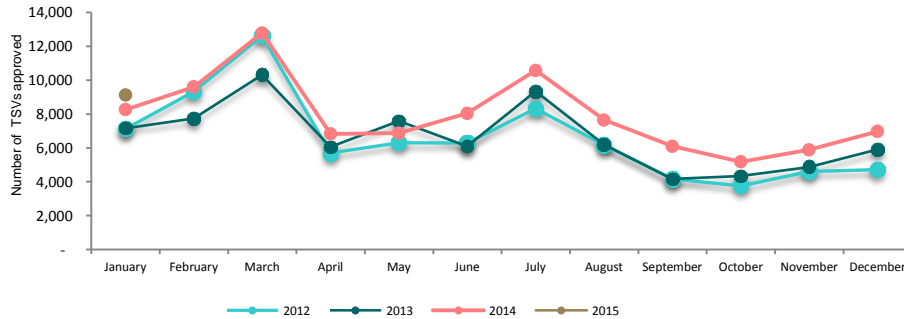
|              |     |      |
|--------------|-----|------|
| Malaysia     | -16 | -15% |
| Viet Nam     | -19 | -18% |
| Saudi Arabia | -47 | -64% |
| Brazil       | -59 | -16% |
| Chile        | -82 | -61% |



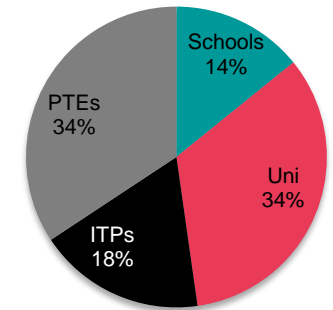
# Overall:

| January RSV  |     | January FSV   |     | January TSV   |     |
|--|-----|---|-----|---|-----|
|  -196 | -6% |  1,057 | 22% |  861 | 10% |

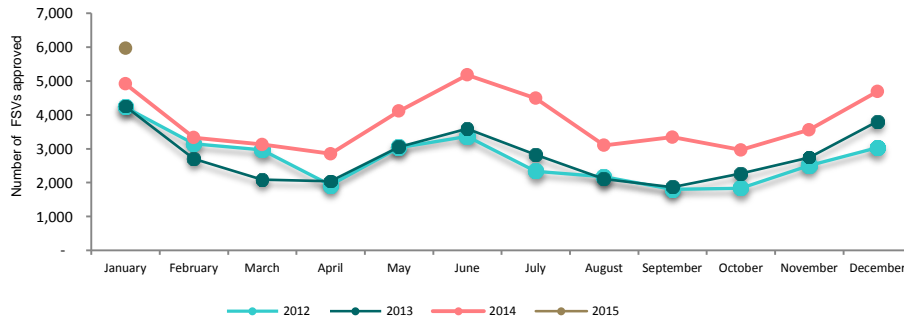
**Overall: Total student visas (TSV) 2012 - 2015**



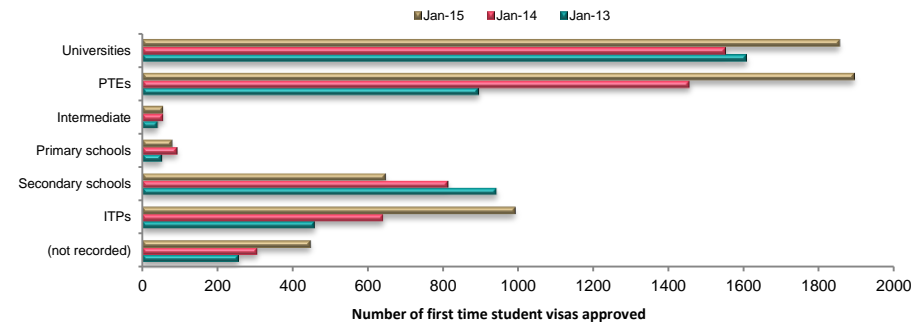
**January 2015 sector breakdown of FSVs**



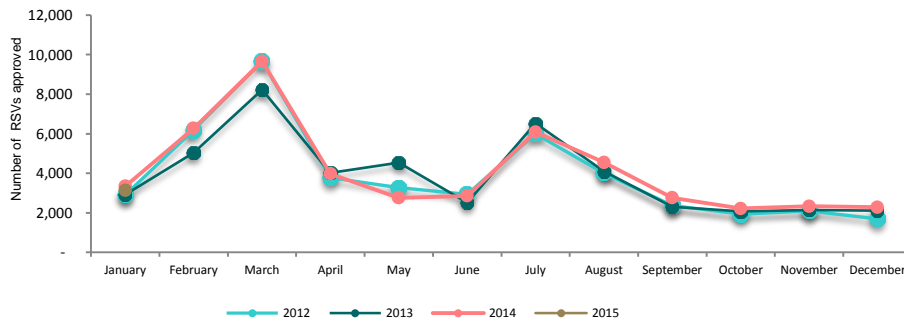
**Overall: First time student visas (FSV) 2012 - 2015**



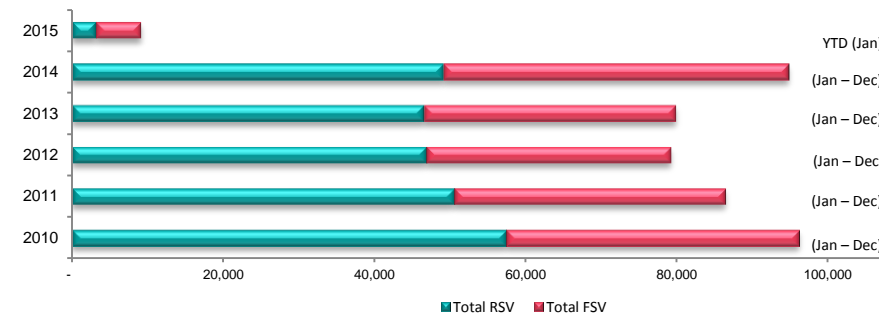
**Overall: First time student visas issued by sector, January**



**Overall: Renewed student visas (RSV) 2012 - 2015**



**Overall: Cumulative total for RSV vs. FSV 2010 - 2015**



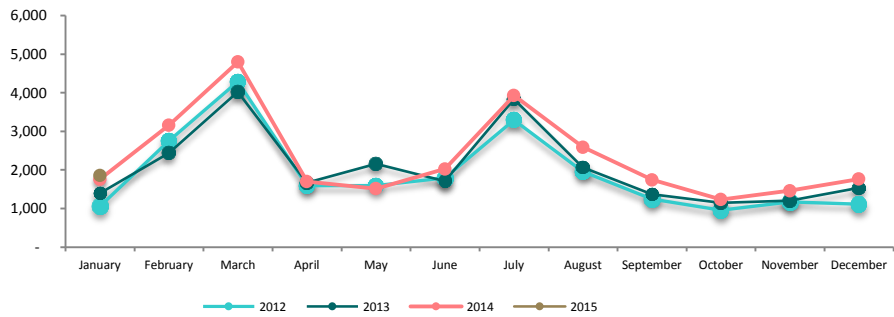
## Takeaways:

- TSVs and FSVs for January show a strong start for the 2015 academic year.
- There has been a relatively balanced sector split of students in January.

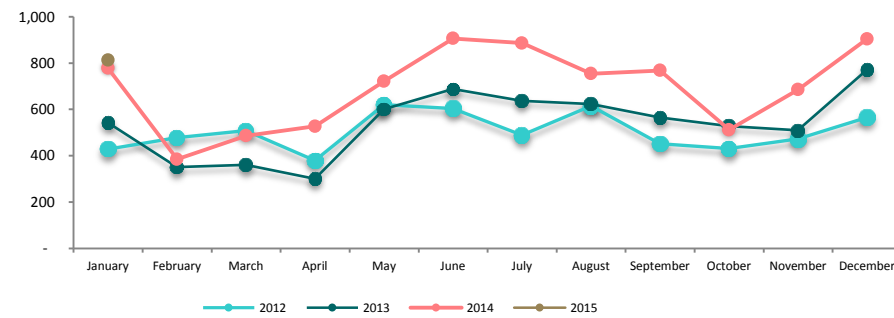


# China:

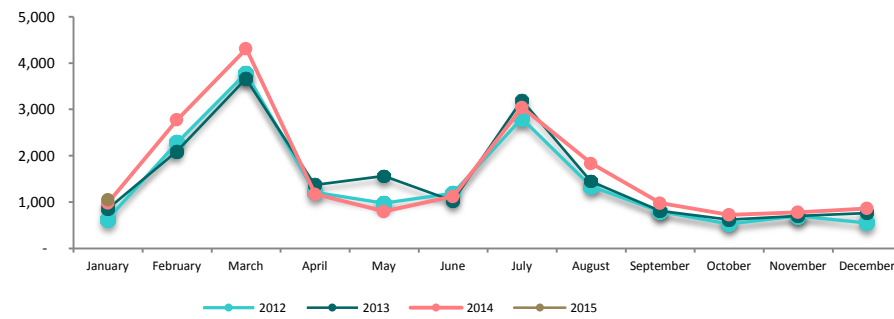
China: Total student visas (TSV) 2012 - 2015



China: First time student visas (FSV) 2012 - 2015



China: Renewed student visas (RSV) 2012 - 2015

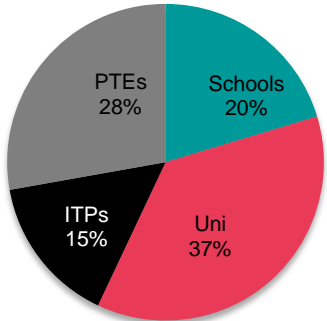


Takeaways:

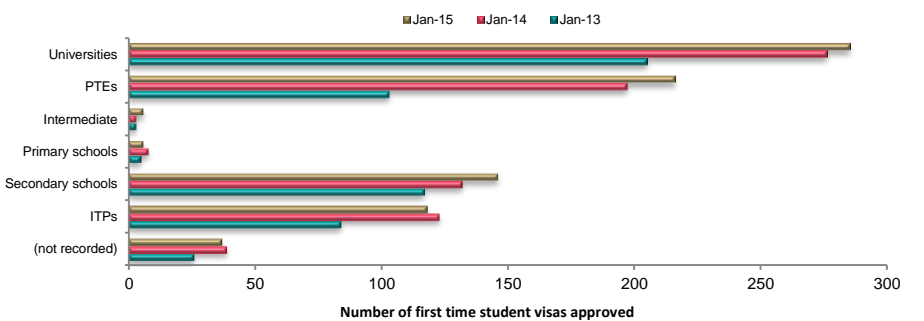
- China experienced a steady start to the 2015.

| January RSV |    | January FSV |   | January TSV |    |
|-------------|----|-------------|---|-------------|----|
| ↑           | 68 | 7%          | ↑ | 36          | 5% |
| ↑           |    |             | ↑ | 104         | 6% |

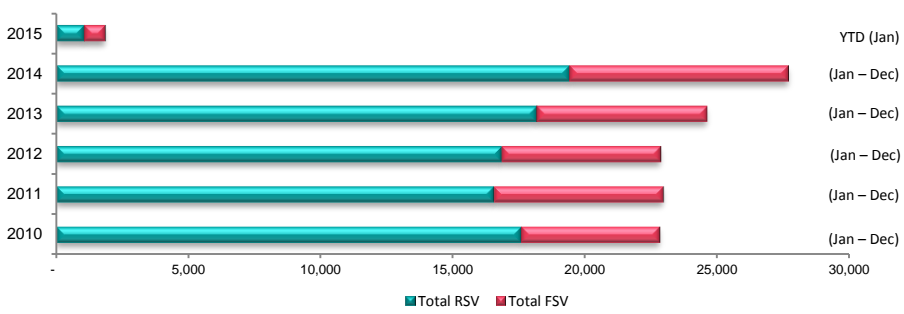
January 2015 sector breakdown of FSVs



China: First time student visas issued by sector, January



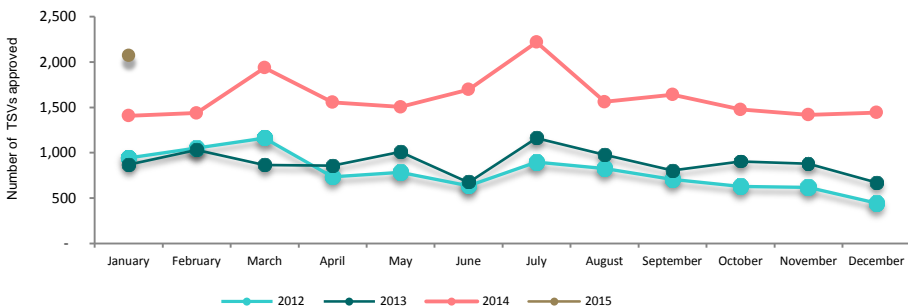
China: Cumulative total for RSV vs. FSV 2010 - 2015



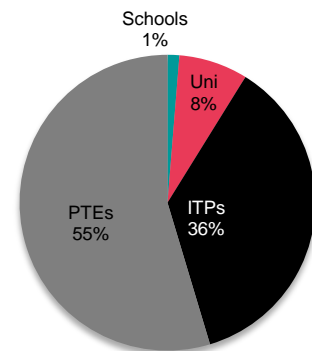


| January RSV | January FSV | January TSV |
|-------------|-------------|-------------|
| ↓ -54       | ↑ 720       | ↑ 666       |
| -18%        | 65%         | 47%         |

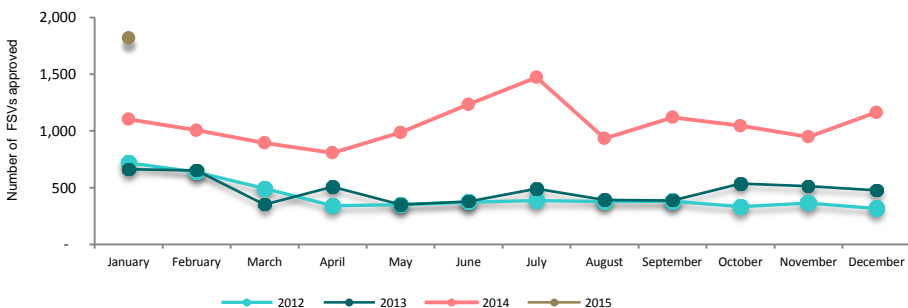
India: Total student visas (TSV) 2012 - 2015



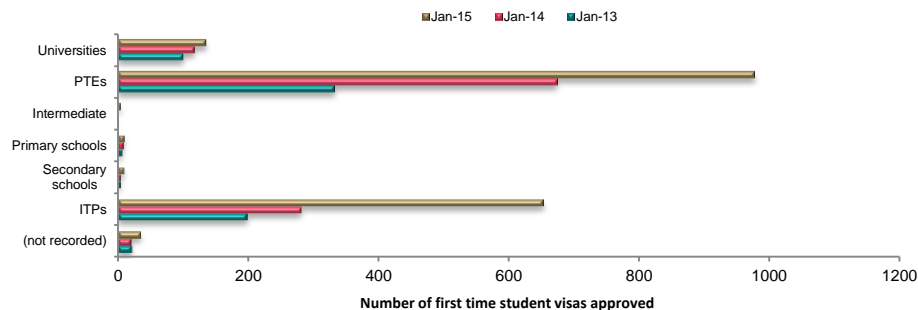
January 2015 sector breakdown of FSVs



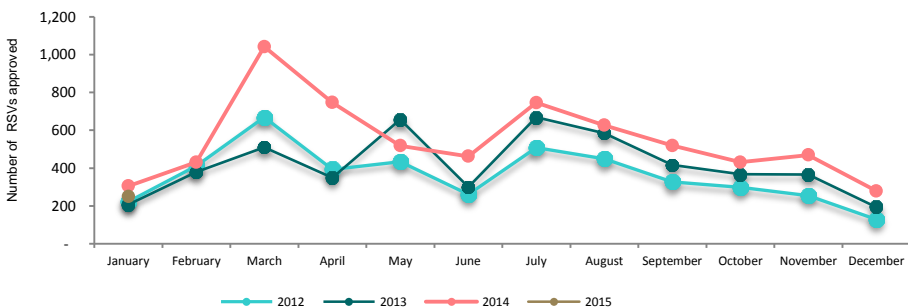
India: First time student visas (FSV) 2012 - 2015



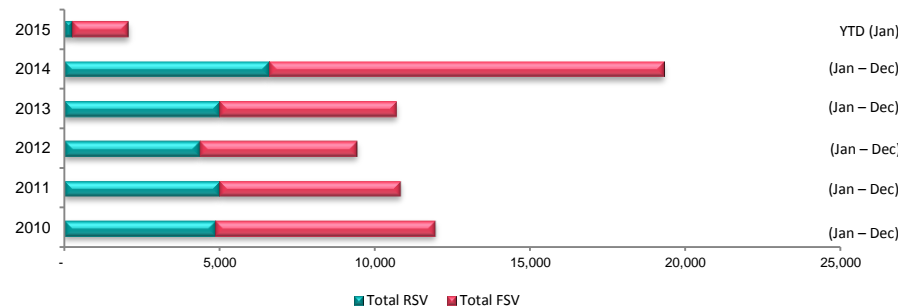
India: First time student visas issued by sector, January



India: Renewed student visas (RSV) 2012 - 2015



India: Cumulative total for RSV vs. FSV 2010 - 2015

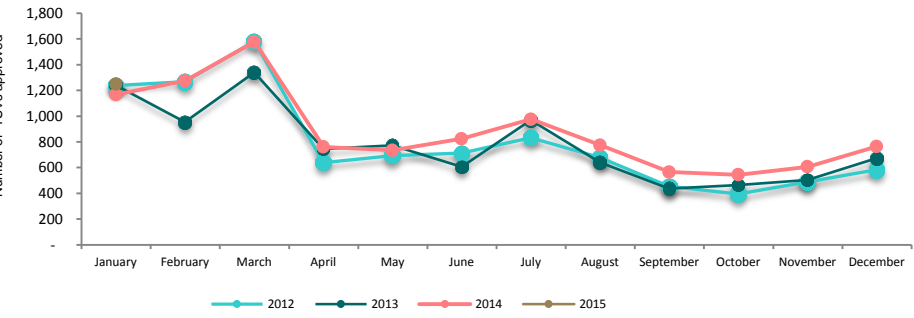


## Takeaways:

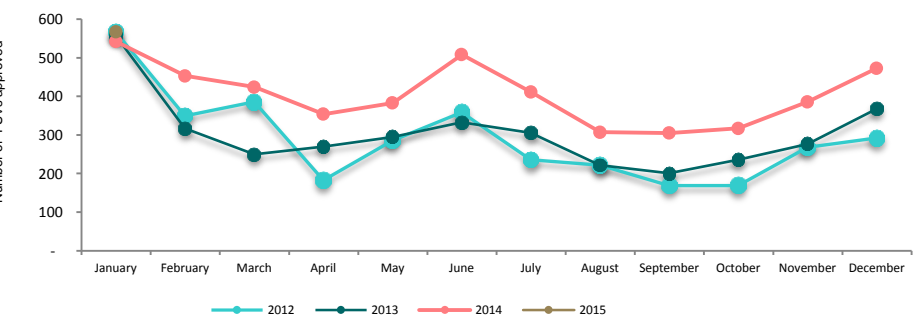
- Following a strong finish to 2014, India continues to see growth.
- The PTE and ITP sectors experienced the highest growth up, 45% and 132% in January 2015.
- RSVs have declined by 18% suggesting that students are not returning or continuing studying in New Zealand.



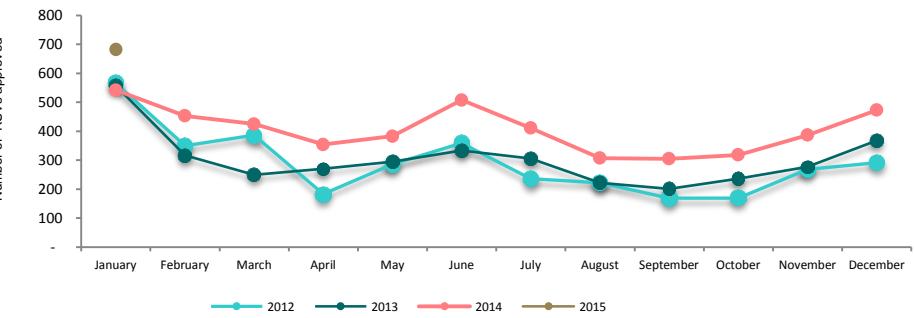
ASEAN: Total student visas (TSV) 2012 - 2015



ASEAN: First time student visas (FSV) 2012 - 2015

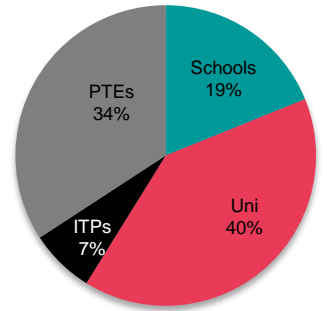


ASEAN: Renewed student visas (RSV) 2012 - 2015

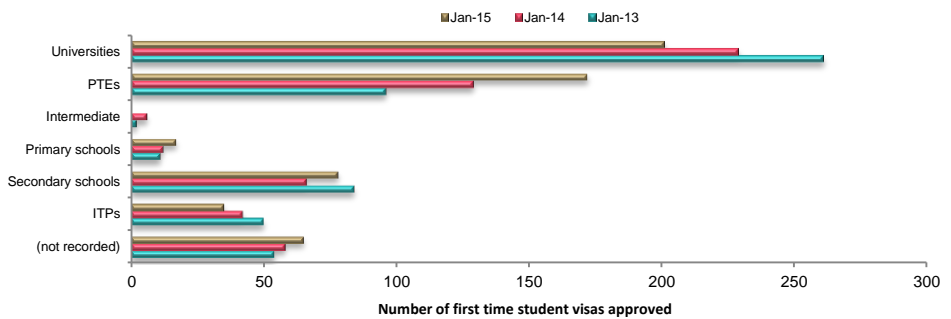


| January RSV |     |     | January FSV |    |    | January TSV |    |    |
|-------------|-----|-----|-------------|----|----|-------------|----|----|
| ↑           | 141 | 26% | ↑           | 26 | 5% | ↑           | 83 | 7% |

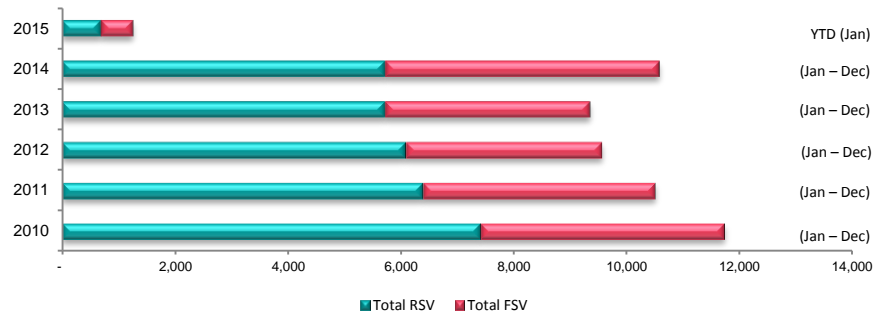
January 2015 sector breakdown of FSVs



ASEAN: First time student visas issued by sector, January



ASEAN: Cumulative total for RSV vs. FSV 2010 - 2015



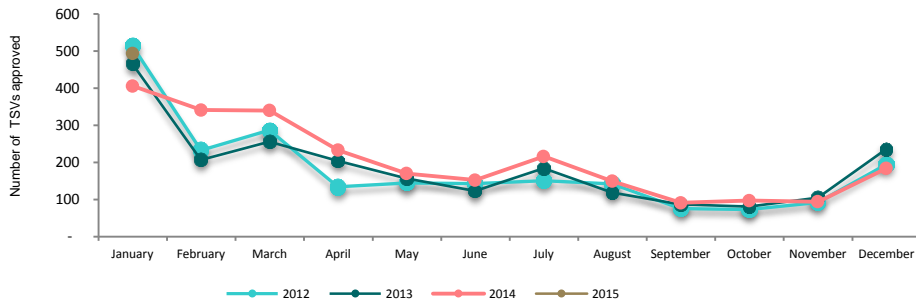
Takeaways:

- The ASEAN market experienced steady growth in 2015.
- There is a high proportion of student visas being approved for the university sector (40%).

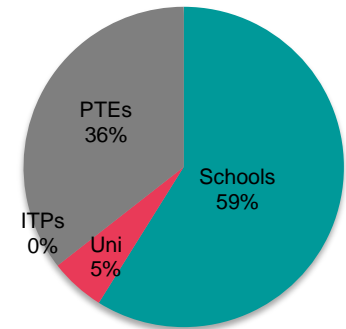
# Thailand:

| January RSV |    |     | January FSV |   | January TSV |   |    |     |
|-------------|----|-----|-------------|---|-------------|---|----|-----|
| ↑           | 85 | 27% | ↑           | 3 | 3%          | ↑ | 88 | 22% |

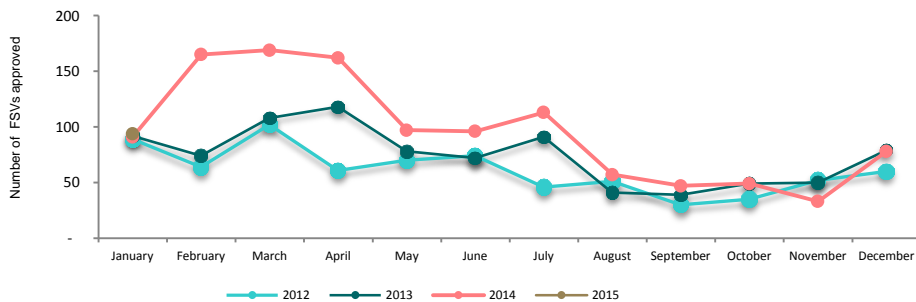
**Thailand: Total student visas (TSV) 2012 - 2015**



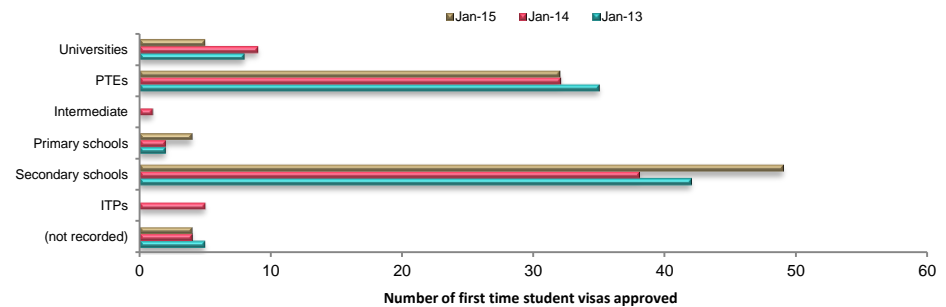
**January 2015 sector breakdown of FSVs**



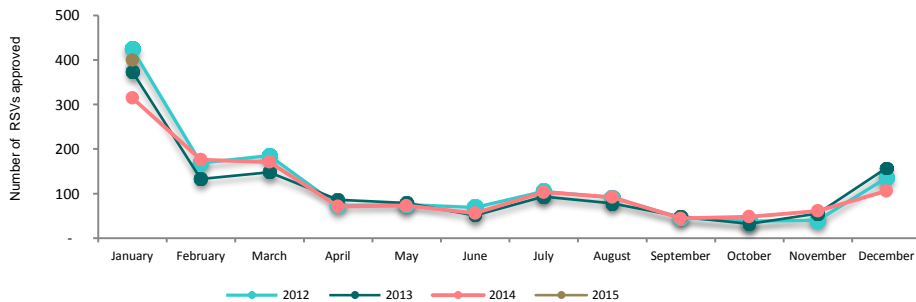
**Thailand: First time student visas (FSV) 2012 - 2015**



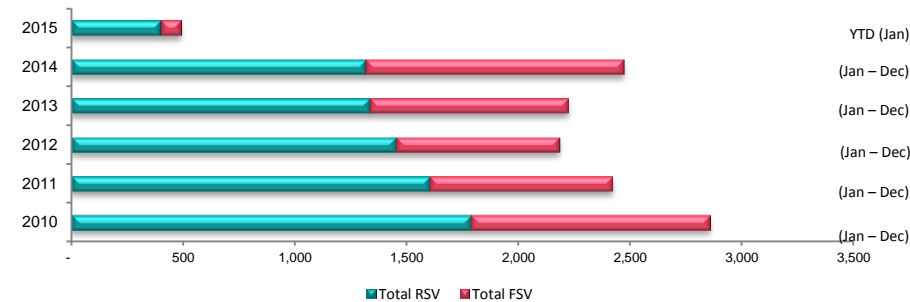
**Thailand: First time student visas issued by sector, January**



**Thailand: Renewed student visas (RSV) 2012 - 2015**






**Thailand: Cumulative total for RSV vs. FSV 2010 - 2015**



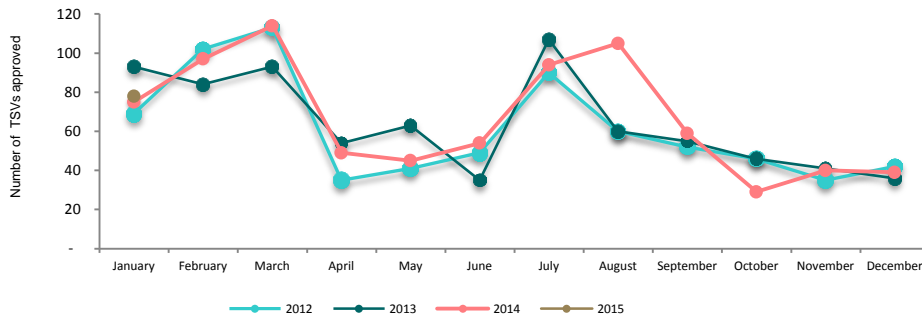
## Takeaways:

- This market experienced a strong start to the year driven by returning students (RSVs) up 27%. FSVs are relatively flat, up 3%.

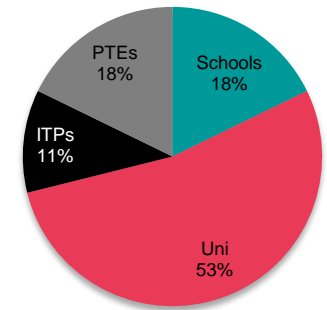
# Indonesia:

| January RSV   |   |    | January FSV   |   |    | January TSV   |   |    |
|---|---|----|---|---|----|---|---|----|
|  | 1 | 4% |  | 2 | 4% |  | 3 | 4% |

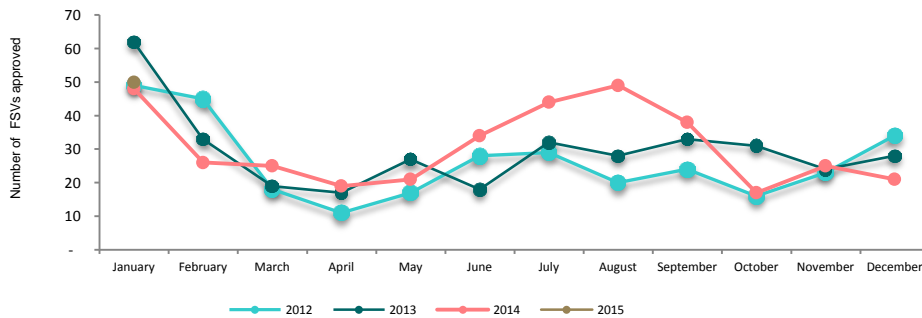
**Indonesia: Total student visas (TSV) 2012 - 2015**



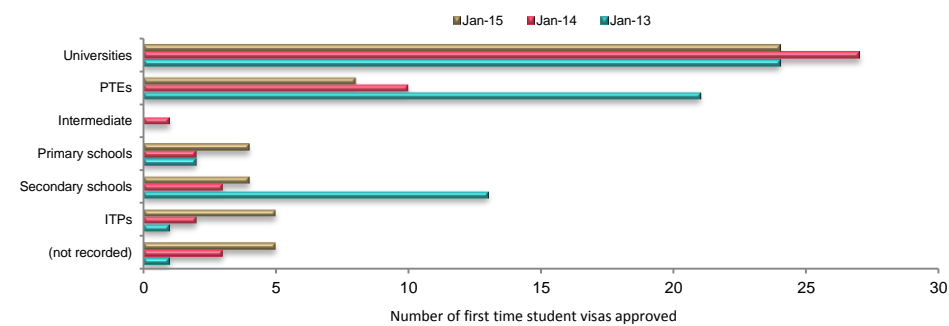
**January 2015 sector breakdown of FSVs**



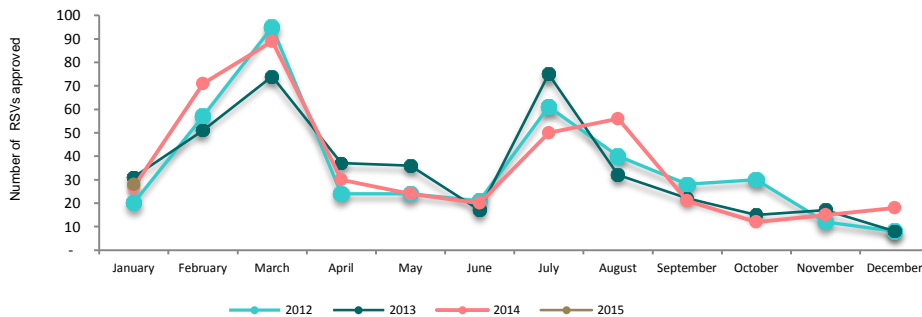
**Indonesia: First time student visas (FSV) 2012 - 2015**



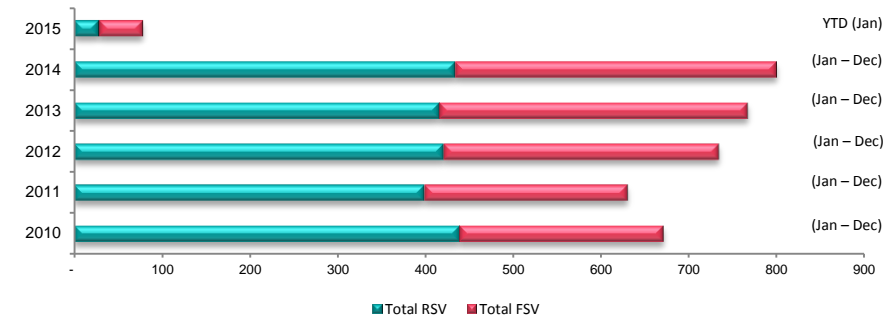
**Indonesia: First time student visas issued by sector, January**



**Indonesia: Renewed student visas (RSV) 2012 - 2015**



**Indonesia: Cumulative total for RSV vs. FSV 2010 - 2015**

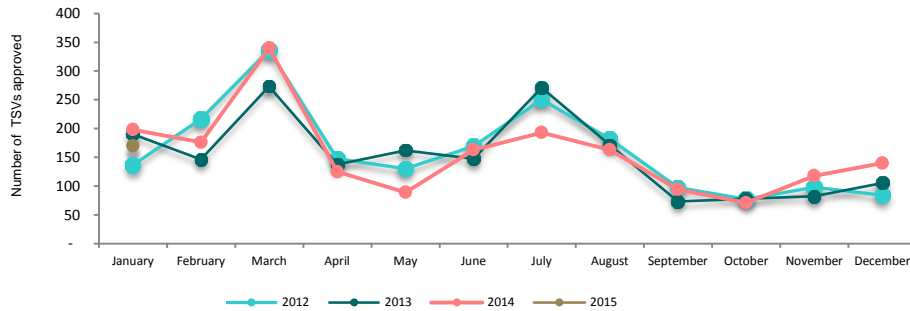


## Takeaways:

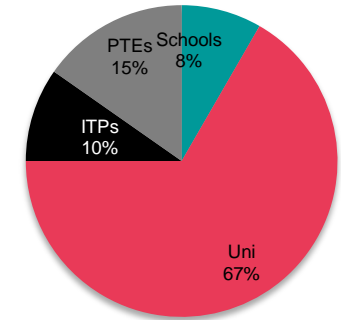
- After a relatively inconsistent 2014, this market has started the year in a flat position.

| January RSV |    |     | January FSV |     | January TSV |     |      |
|-------------|----|-----|-------------|-----|-------------|-----|------|
| ↓           | -9 | -9% | ↓           | -19 | ↓           | -28 | -14% |

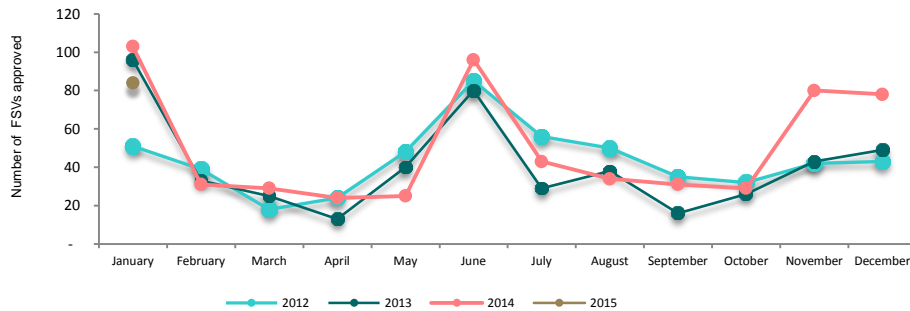
**Viet Nam: Total student visas (TSV) 2012 - 2015**



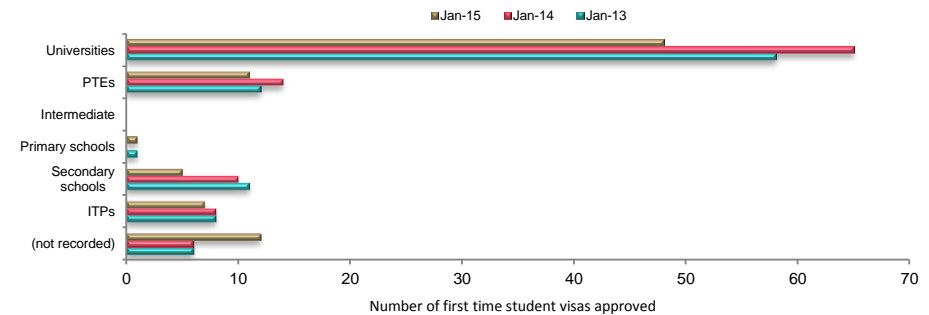
**January 2015 sector breakdown of FSVs**



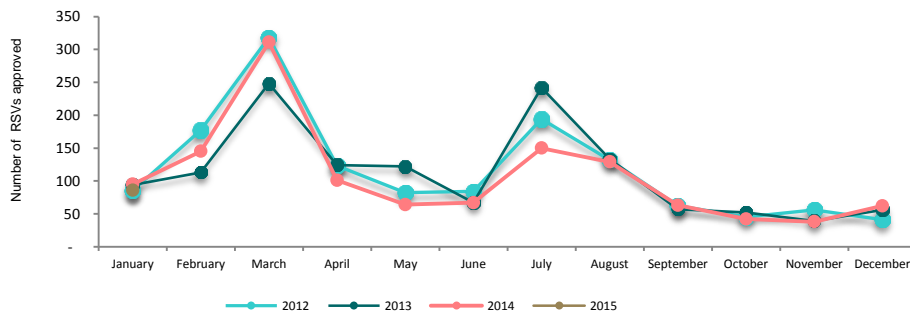
**Viet Nam: First time student visas (FSV) 2012 - 2015**



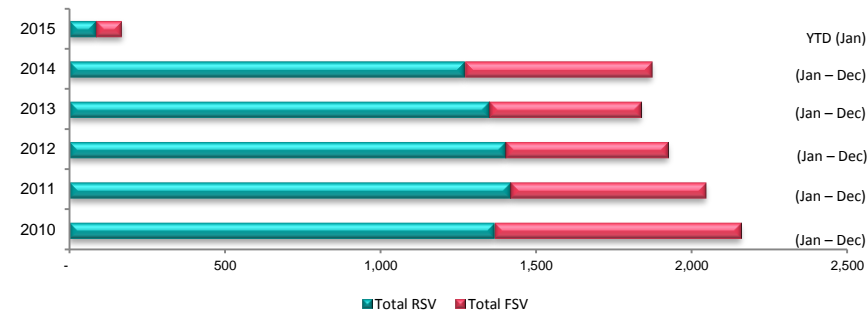
**Viet Nam: First time student visas issued by sector, January**



**Viet Nam: Renewed student visas (RSV) 2012 - 2015**



**Viet Nam: Cumulative total for RSV vs. FSV 2010 - 2015**

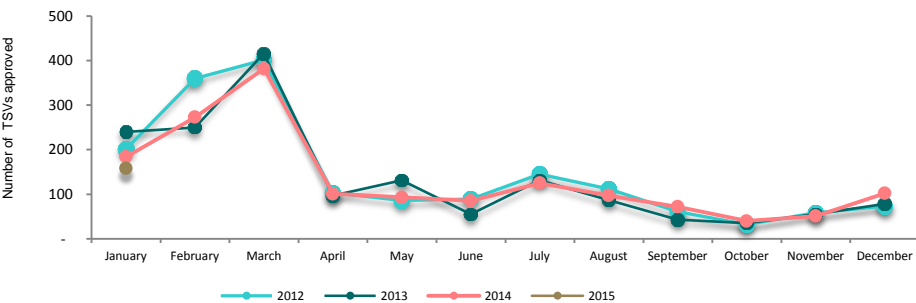


## Takeaways:

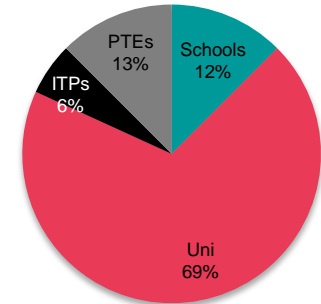
- The final quarter of 2014, specifically November and December, saw a strong finish to the year. However the start of 2015 has seen a relatively significant decline in student visa approvals.

| January RSV |      | January FSV |      | January TSV |      |
|-------------|------|-------------|------|-------------|------|
| ↓           | -9   | ↓           | -16  | ↓           | -25  |
|             | -12% |             | -15% |             | -14% |

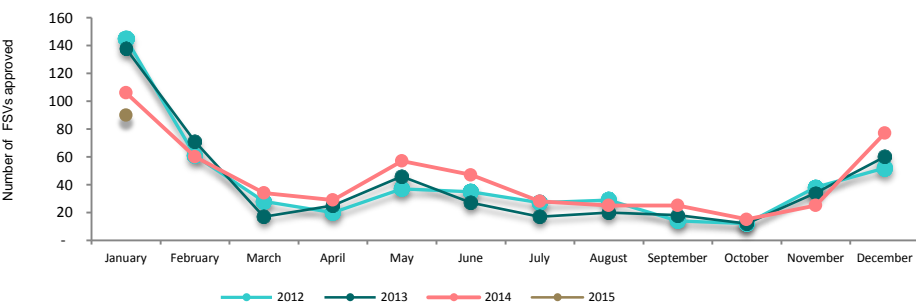
Malaysia: Total student visas (TSV) 2012 - 2015



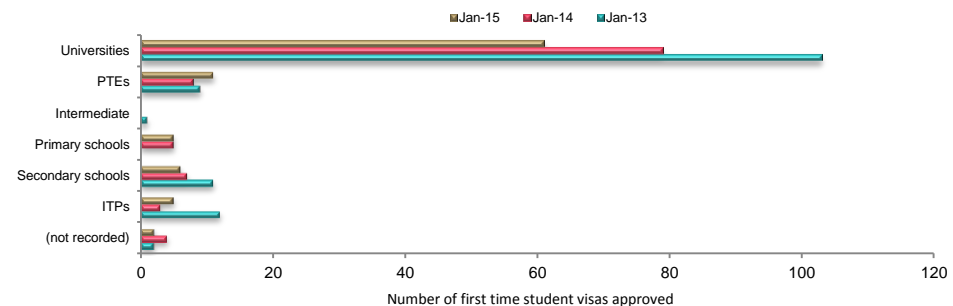
January 2015 sector breakdown of FSVs



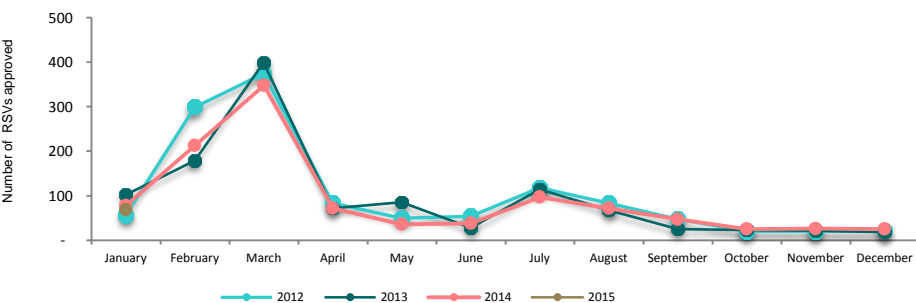
Malaysia: First time student visas (FSV) 2012 - 2015



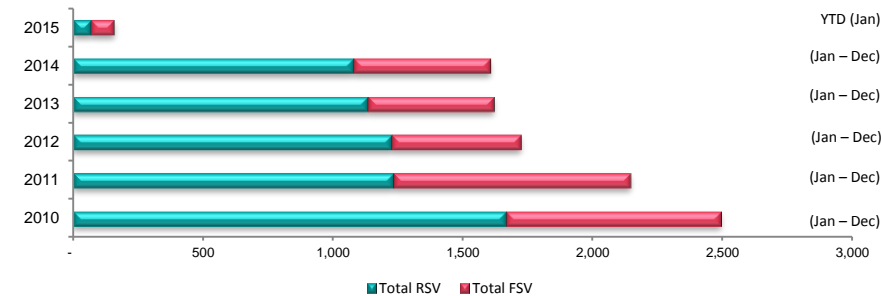
Malaysia: First time student visas issued by sector, January



Malaysia: Renewed student visas (RSV) 2012 - 2015






Malaysia: Cumulative total for RSV vs. FSV 2010 - 2015

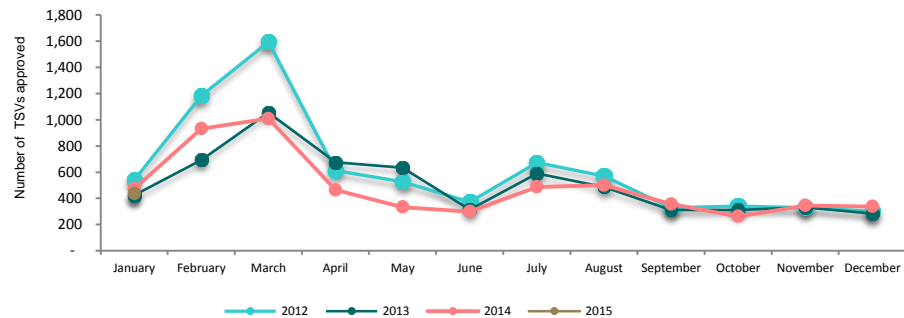


## Takeaways:

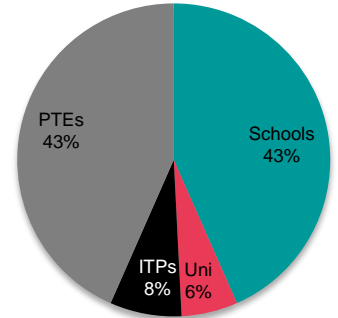
- This market has tracked flat throughout 2014 and has experienced a relatively significant decline in January 2015 down 14% TSVs.

| January RSV   |      | January FSV   |    | January TSV   |     |
|---|------|---|----|---|-----|
|  -39 | -14% |  3 | 2% |  -36 | -8% |

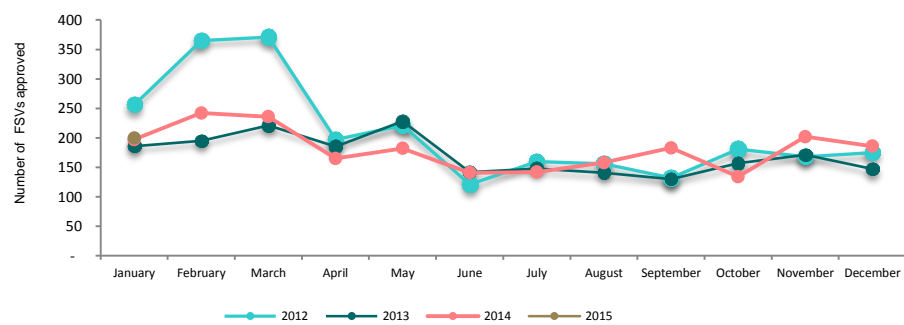
**Korea: Total student visas (TSV) 2012 - 2015**



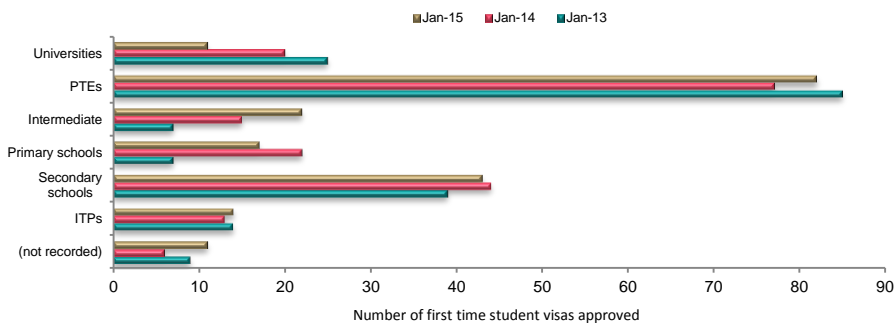
**January 2015 sector breakdown of FSVs**



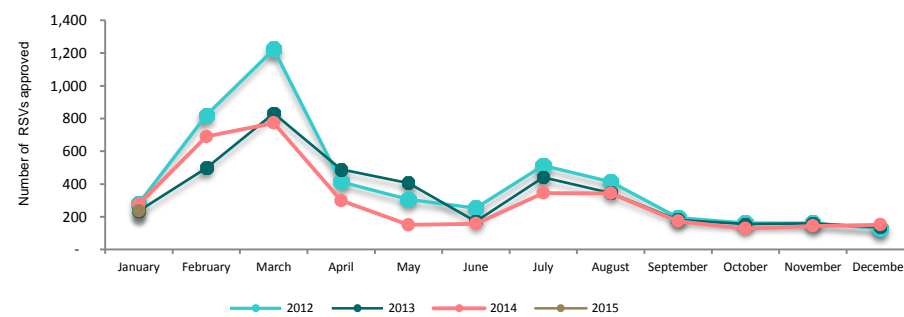
**Korea: First time student visas (FSV) 2012 - 2015**



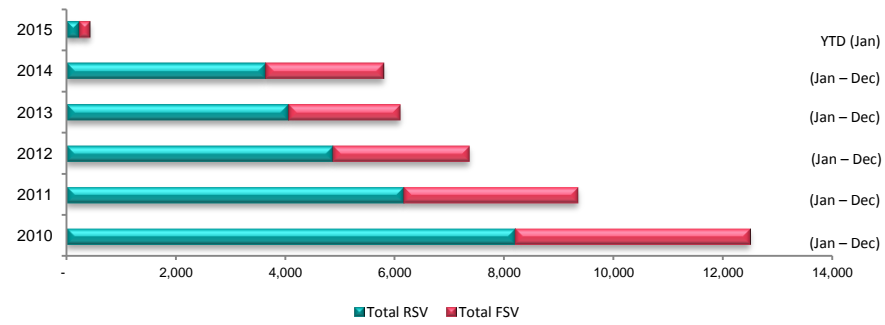
**Korea: First time student visas issued by sector, January**



**Korea: Total Renewed student visas (RSV) 2012 - 2015**



**Korea: Cumulative total for RSV vs. FSV 2010 - 2015**



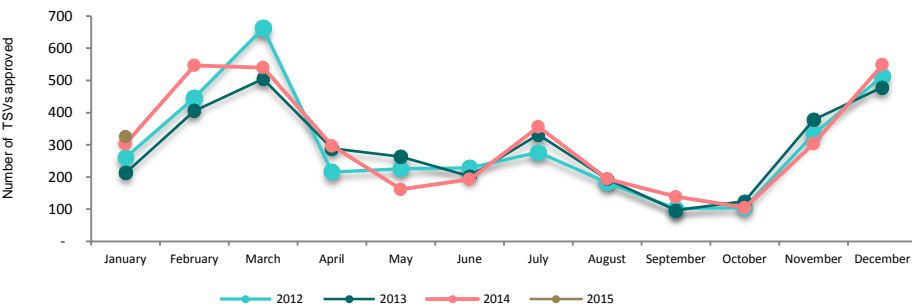
- Takeaways:**
- This market continues to see negative results.
  - There was a small increase in PTE and ITP FSV approvals.

# Japan:

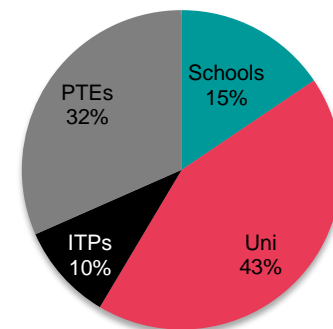


| January RSV |      | January FSV |     | January TSV |    |
|-------------|------|-------------|-----|-------------|----|
| ↓           | -27  | ↑           | 49  | ↑           | 22 |
|             | -18% |             | 32% |             | 7% |

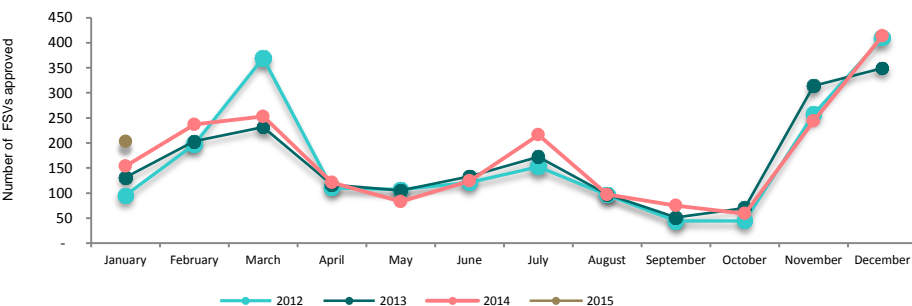
Japan: Total student visas (TSV) 2012 - 2015



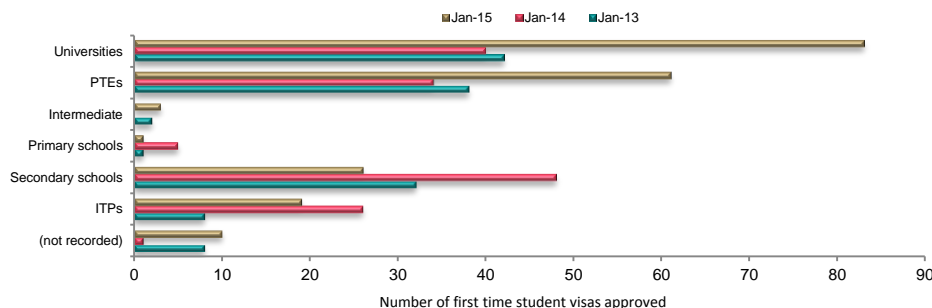
January 2015 sector breakdown of FSVs



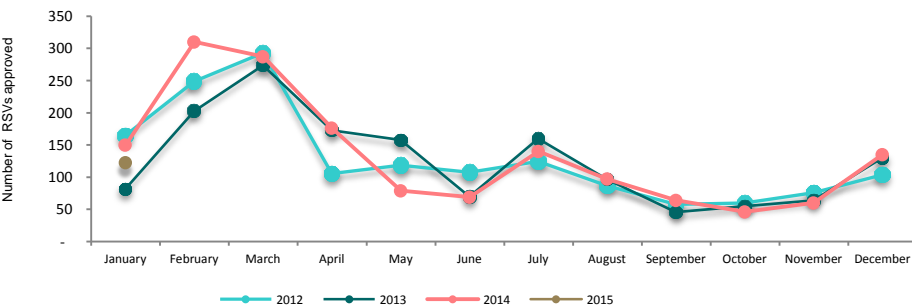
Japan: First time student visas (FSV) 2012 - 2015



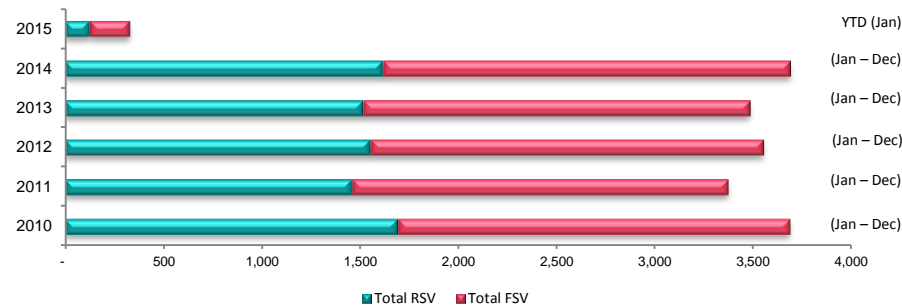
Japan: First time student visas issued by sector, January



Japan: Renewed student visas (RSV) 2012 - 2015



Japan: Cumulative total for RSV vs. FSV 2010 - 2015






## Takeaways:

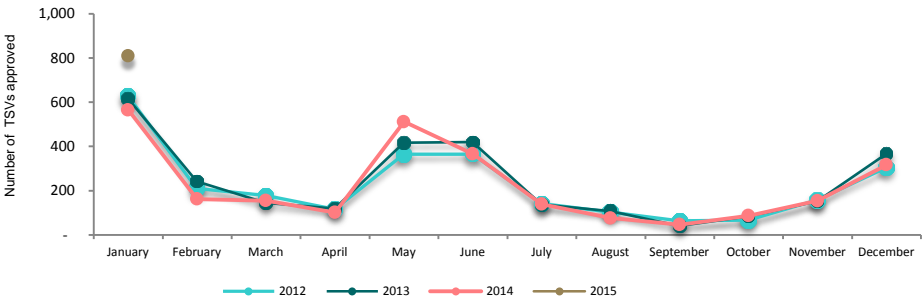
- This market has experienced a positive start to 2015, with the university and PTE sectors seeing strong growth, up 100% and 80%.



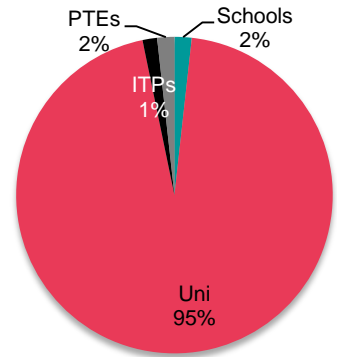
# United States of America:

| January RSV   |      | January FSV   |     | January TSV   |     |
|---|------|---|-----|---|-----|
|  -12 | -24% |  258 | 50% |  246 | 44% |

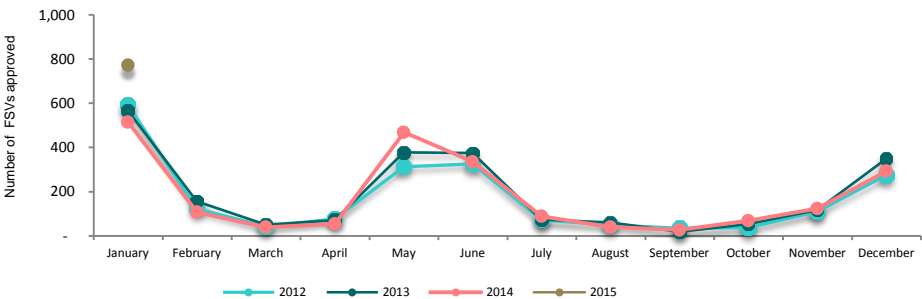
United States of America: Total student visas (TSV) 2012 - 2015



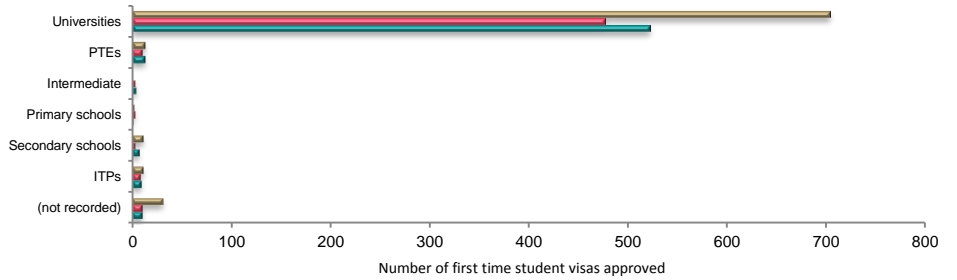
January 2015 sector breakdown of FSVs



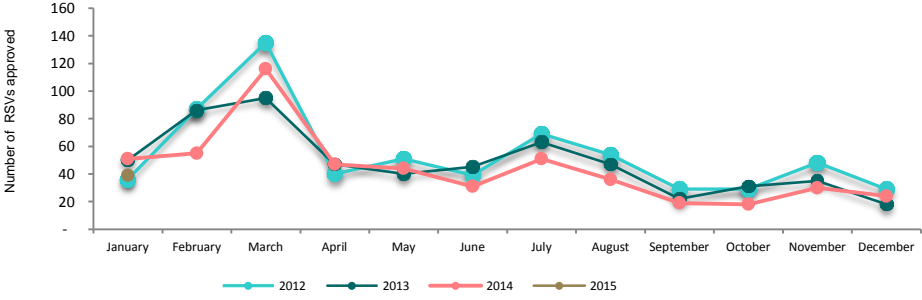
United States of America: First time student visas (FSV) 2012 - 2015



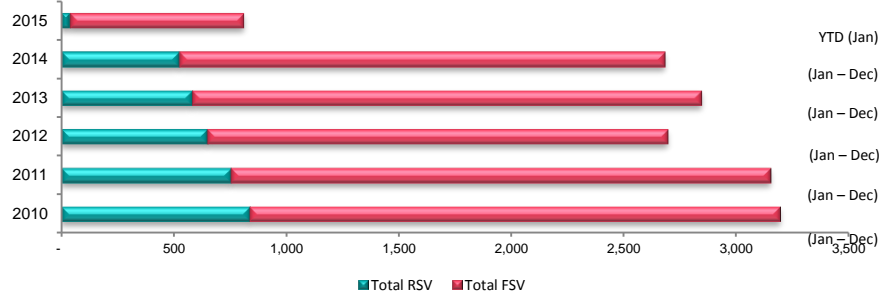
United States of America: First time student visas issued by sector, January



United States of America: Renewed student visas (RSV) 2012 - 2015



United States of America: Cumulative total for RSV vs. FSV 2010 - 2015

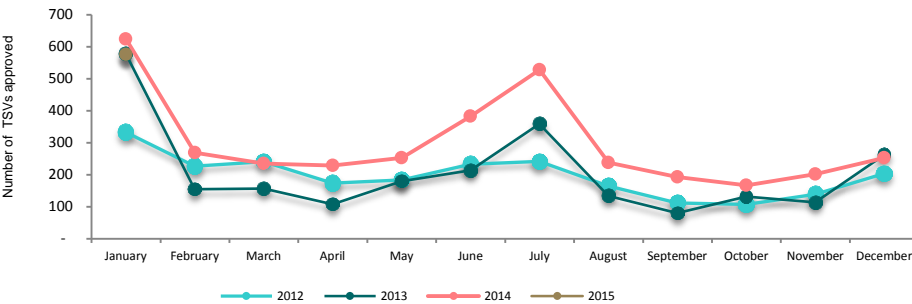


## Takeaways:

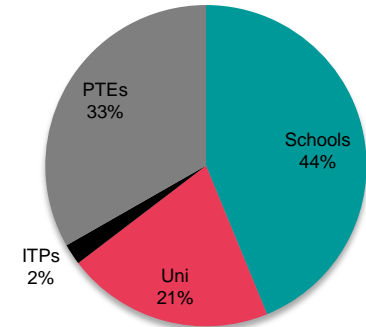
- This market has experienced a significant increase in FSVs, up 50% (258) on January 2014.
- 95% of the FSVs are university students.
- This market was the second fastest growing market for January 2015 after India.

| January RSV |   |    | January FSV |     | January TSV |     |     |
|-------------|---|----|-------------|-----|-------------|-----|-----|
| ↑           | 4 | 7% | ↓           | -51 | ↓           | -47 | -8% |

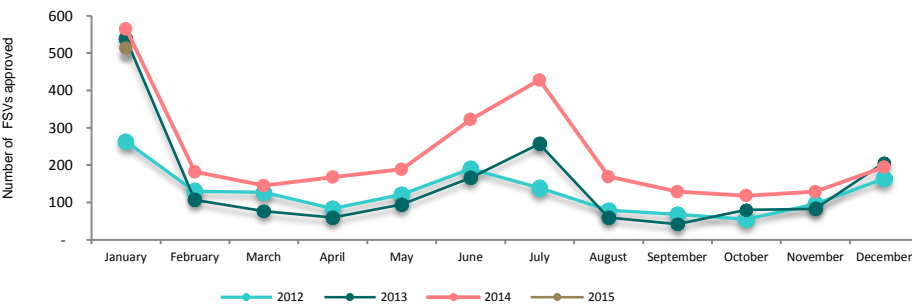
**Latin America: Total student visas (TSV) 2012 - 2015**



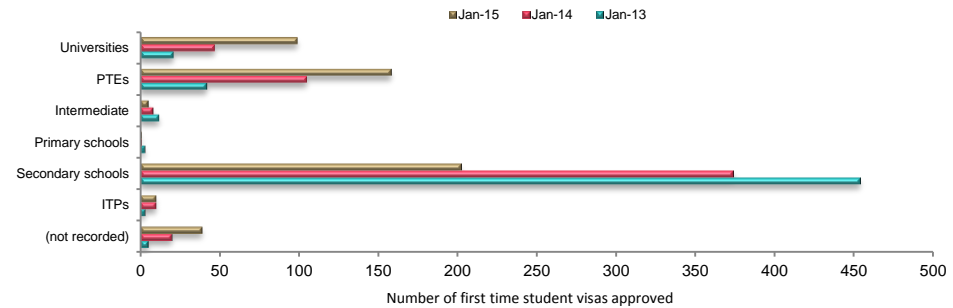
**January 2015 sector breakdown of FSVs**



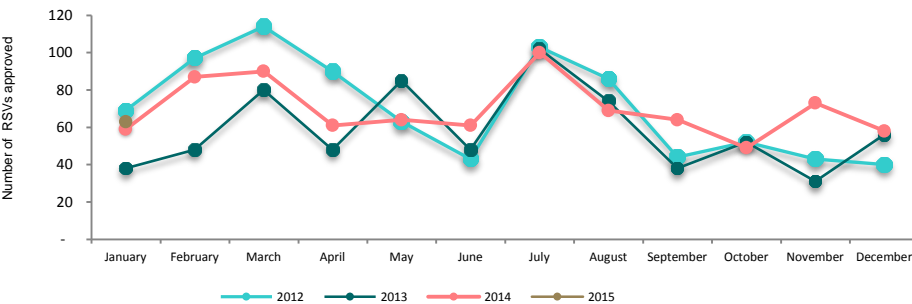
**Latin America: First time student visas (FSV) 2012 - 2015**



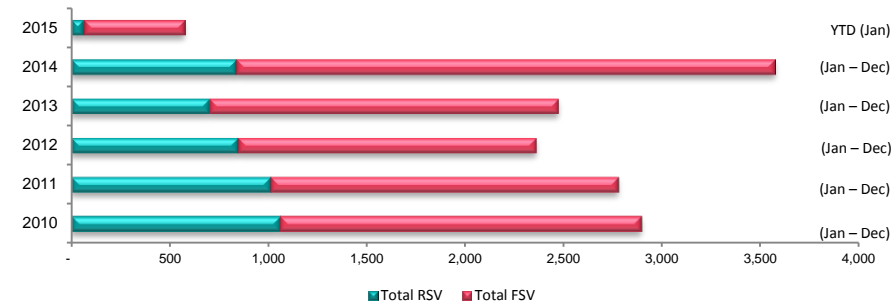
**Latin America: First time student visas issued by sector, January**



**Latin America: Renewed student visas (RSV) 2012 - 2015**






**Latin America: Cumulative total for RSV vs. FSV 2010 - 2015**



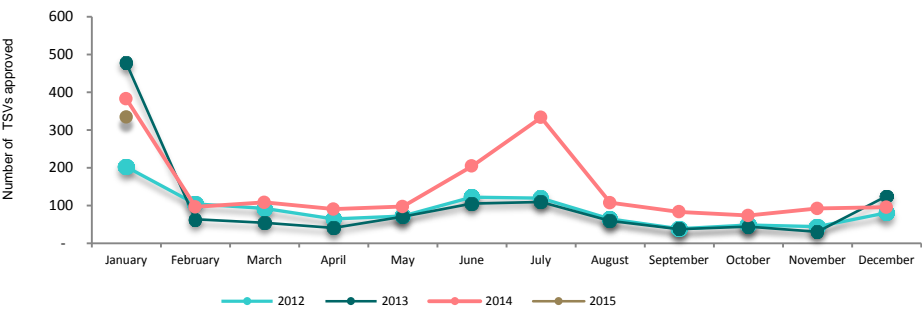
## Takeaways:

- This market experienced significant growth in 2014, however has had a slow start to 2015.
- The university and PTE sectors have experienced growth.
- The sharp decline in school FSVs is due to a reduction in Chilean scholarship students (Penguins).

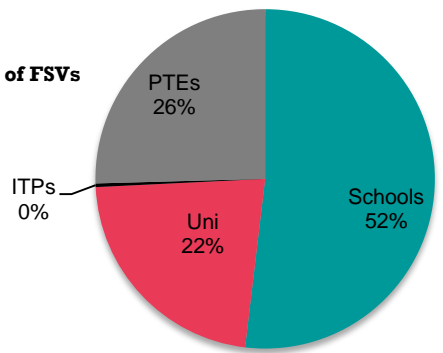
# Brazil:

| January RSV  | January FSV  | January TSV  |
|--|--|--|
|  11 58% |  -59 -16% |  -48 -13% |

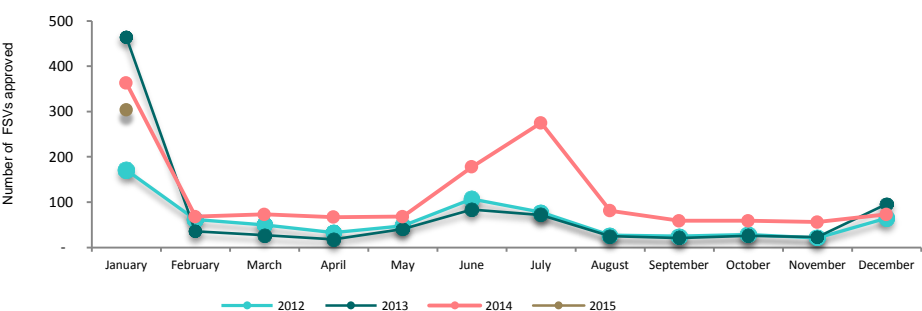
**Brazil: Total student visas (TSV) 2012 - 2015**



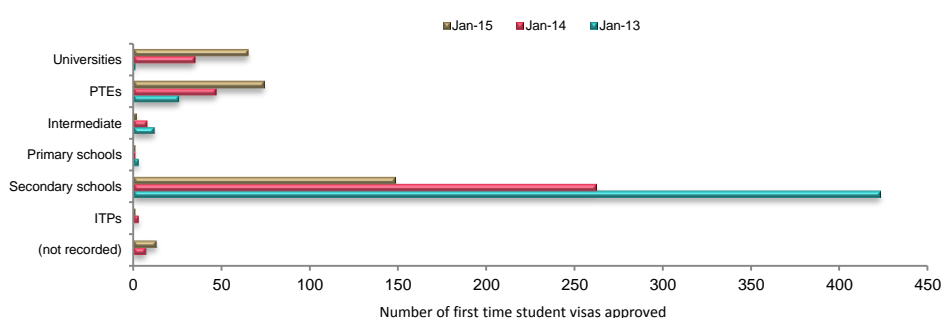
**January 2015 sector breakdown of FSVs**



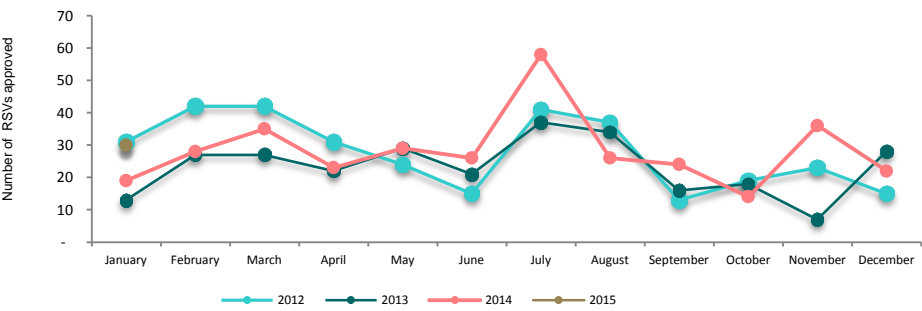
**Brazil: First time student visas (FSV) 2012 - 2015**



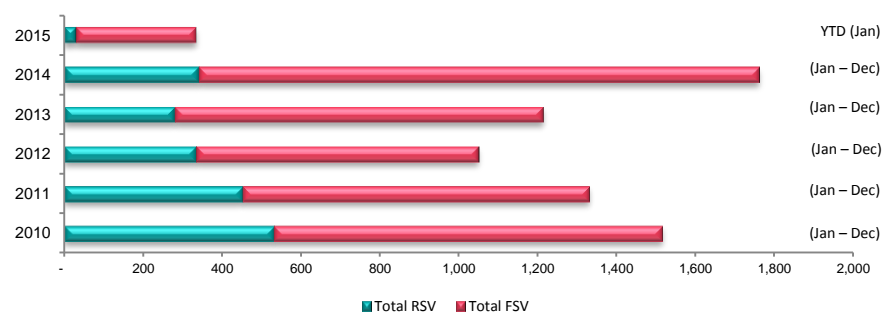
**Brazil: First time student visas issued by sector, January**



**Brazil: Renewed student visas (RSV) 2012 - 2015**



**Brazil: Cumulative total for RSV vs. FSV 2010 - 2015**

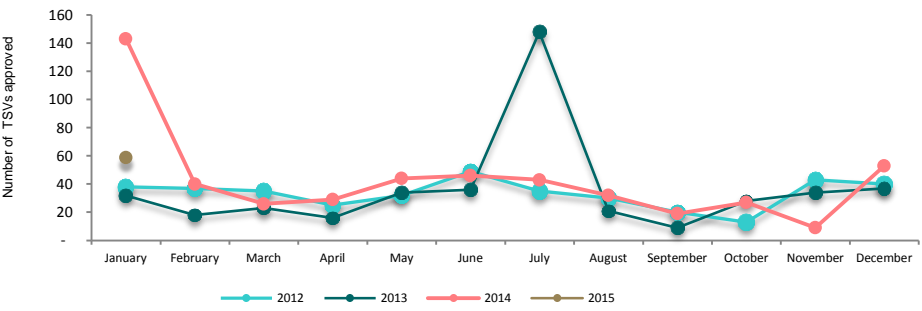


## Takeaways:

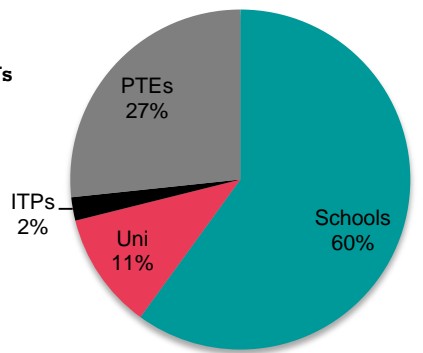
- This market has had a negative start to the year.
- Only university and PTE sectors have experienced growth.

| January RSV | January FSV | January TSV |
|-------------|-------------|-------------|
| ↓ -2        | ↓ -82       | ↓ -84       |
| -25%        | -61%        | -59%        |

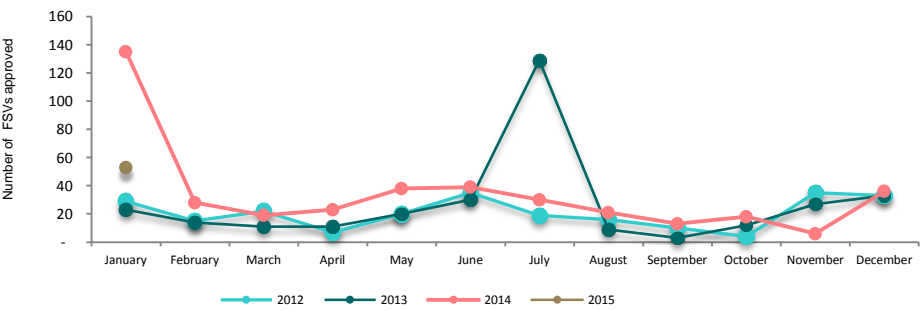
**Chile: Total student visas (TSV) 2012 - 2015**



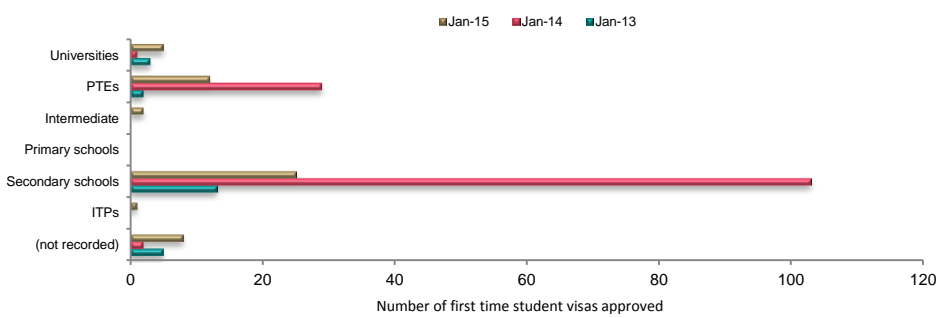
**January 2015 sector breakdown of FSVs**



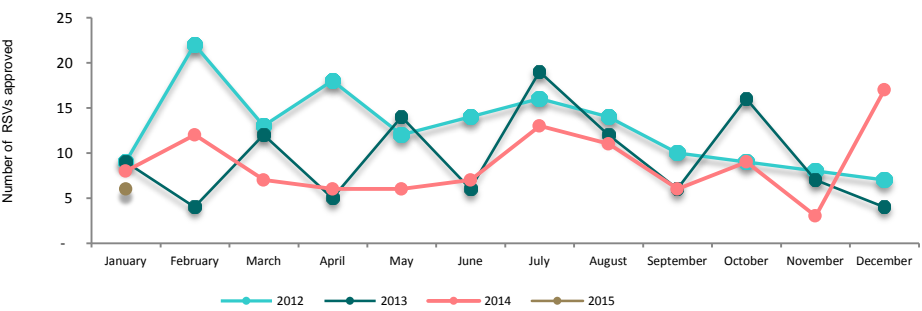
**Chile: First time student visas (FSV) 2012 - 2015**



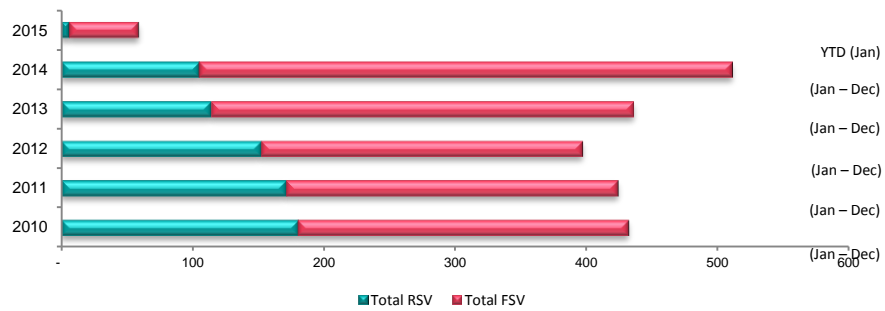
**Chile: First time student visas issued by sector, January**



**Chile: Renewed student visas (RSV) 2012 - 2015**






**Chile: Cumulative total for RSV vs. FSV 2010 - 2015**

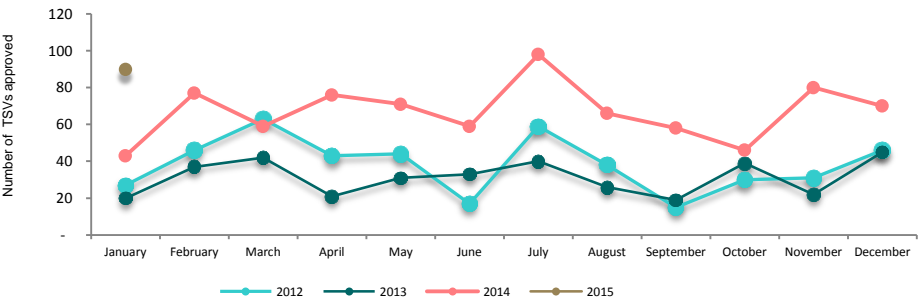


## Takeaways:

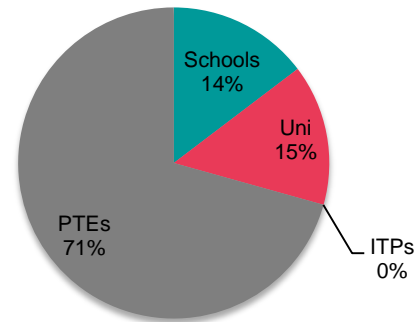
- This market has experienced a decline in visa approvals for January 2015.
- A reduction in Chilean scholarship students has caused a significant decline in secondary school students.

| January RSV  |   |     | January FSV   |    |      | January TSV   |    |      |
|--|---|-----|---|----|------|---|----|------|
|  | 3 | 25% |  | 44 | 142% |  | 47 | 109% |

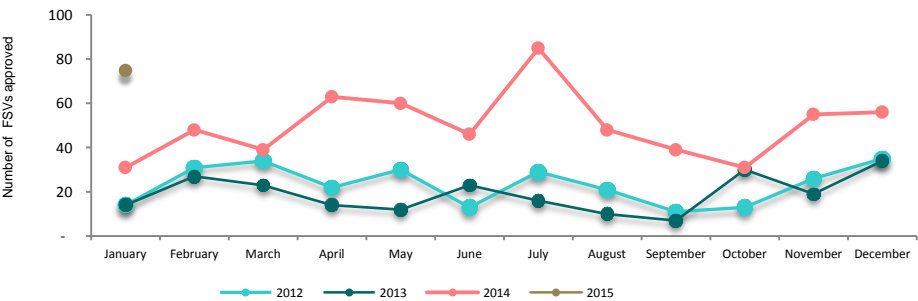
**Colombia: Total student visas (TSV) 2012 - 2015**



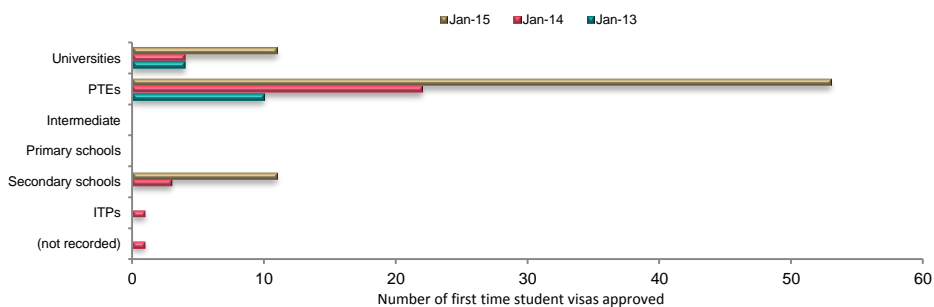
**January 2015 sector breakdown of FSVs**



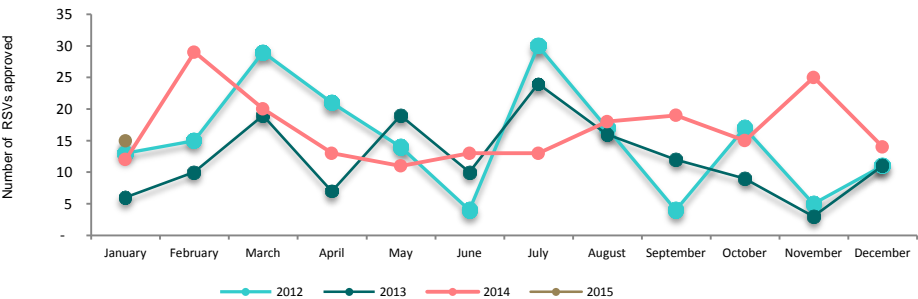
**Colombia: First time student visas (FSV) 2012 - 2015**



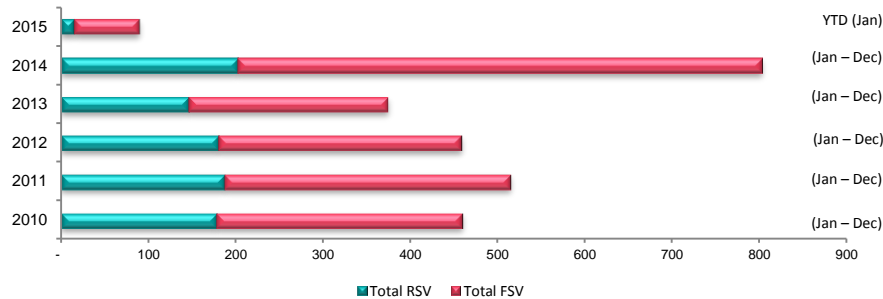
**Colombia: First time student visas issued by sector, January**



**Colombia: Renewed student visas (RSV) 2012 - 2015**



**Colombia: Cumulative total for RSV vs. FSV 2010 - 2015**



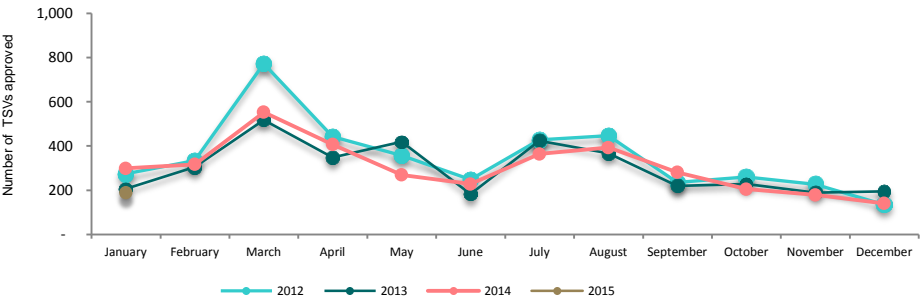
## Takeaways:

- This market has experienced significant growth in January.
- While the absolute numbers are relatively small, the university, PTE and schools sectors have experienced strong growth.

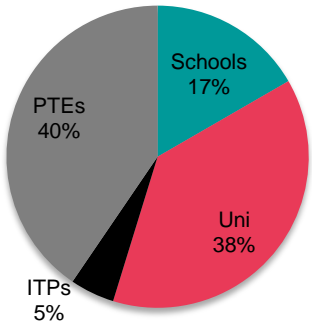
# Middle East:

| January RSV |      | January FSV |      | January TSV |      |
|-------------|------|-------------|------|-------------|------|
| ↓           | -56  | ↓           | -54  | ↓           | -110 |
|             | -29% |             | -51% |             | -37% |

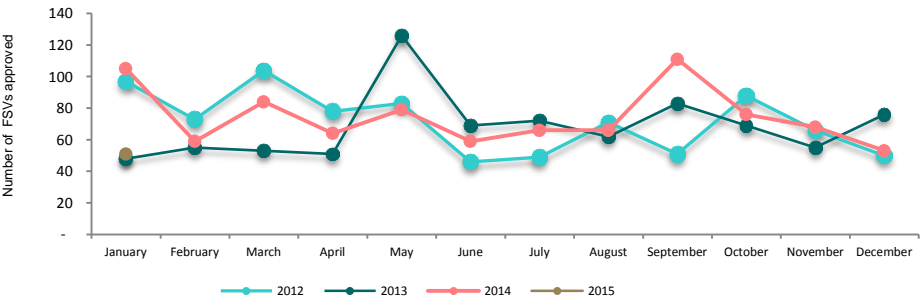
Middle East: Total student visas (TSV) 2012 - 2015



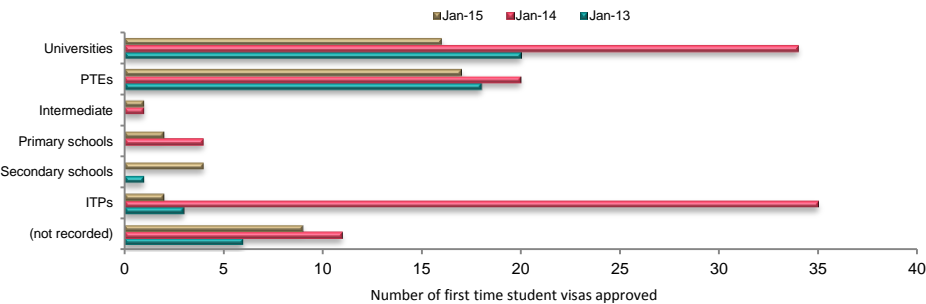
January 2015 sector breakdown of FSVs



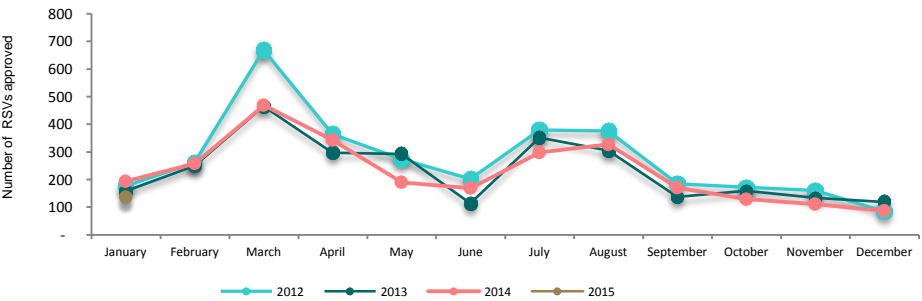
Middle East: First time student visas (FSV) 2012 - 2015



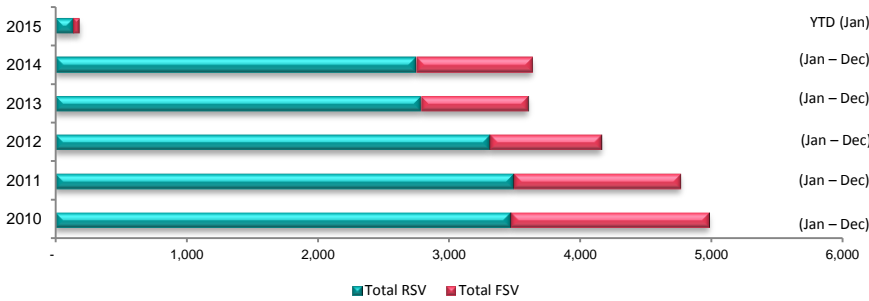
Middle East: First time student visas issued by sector, January



Middle East: Renewed student visas (RSV) 2012 - 2015






Middle East: Cumulative total for RSV vs. FSV 2010 - 2015



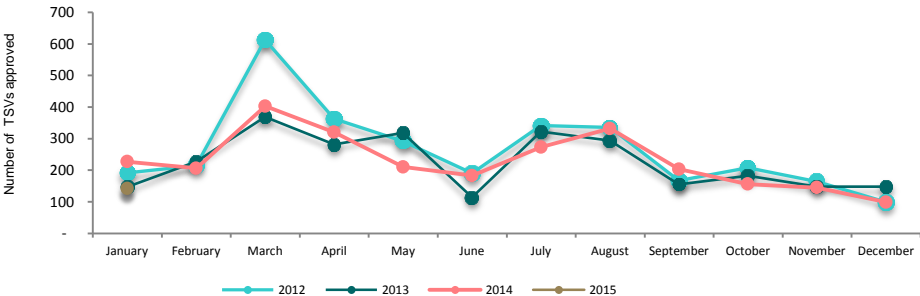
Takeaways:

- This market continues to experience negative results.

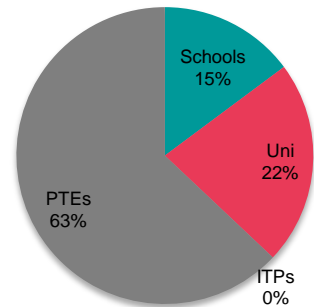
# Saudi Arabia:

| January RSV   | January FSV | January TSV   |
|---|-------------|---|
|  -37 | -24%        |  -47 |
|   |             | -64%  |
|   |             |  -84 |
|   |             | -37%  |

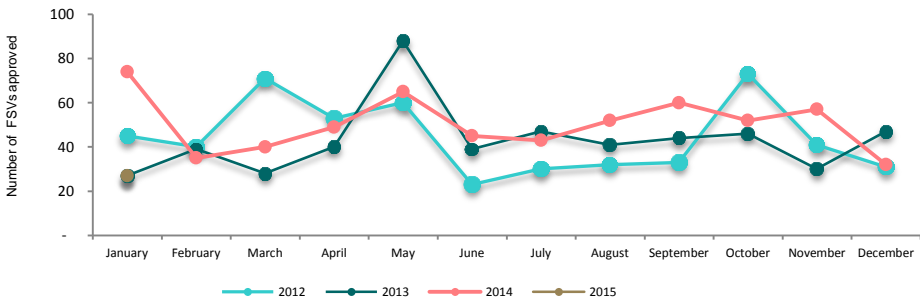
**Saudi Arabia: Total student visas (TSV) 2012 - 2015**



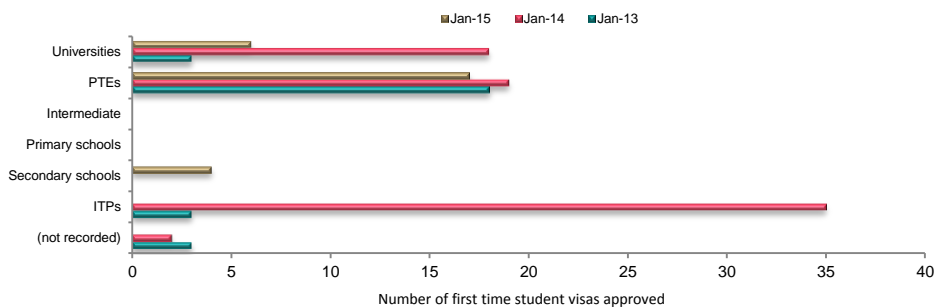
**January 2015 sector breakdown of FSVs**



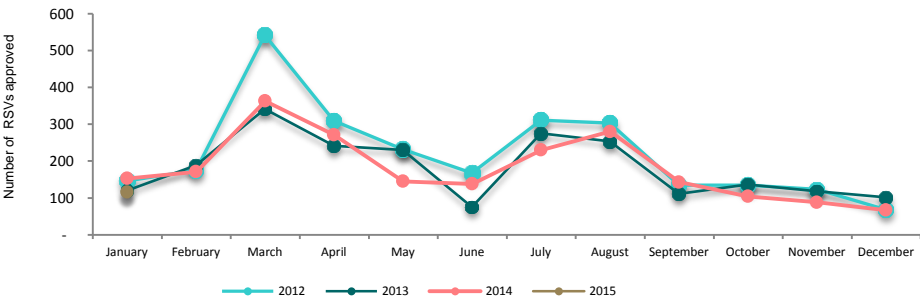
**Saudi Arabia: First time student visas (FSV) 2012 - 2015**



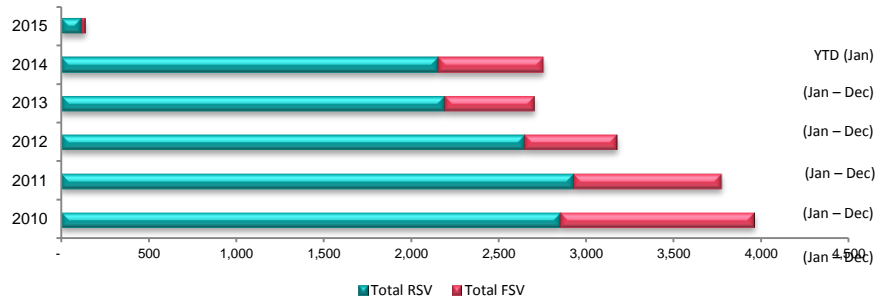
**Saudi Arabia: First time student visas issued by sector, January**



**Saudi Arabia: Renewed student visas (RSV) 2012 - 2015**



**Saudi Arabia: Cumulative total for RSV vs. FSV 2010 - 2015**



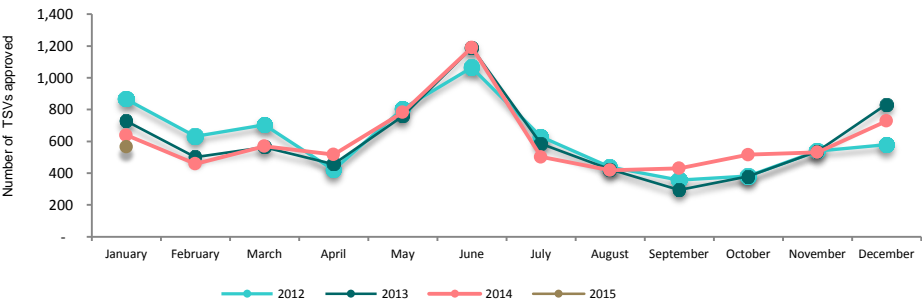
## Takeaways:

- This market continues to experience negative results.

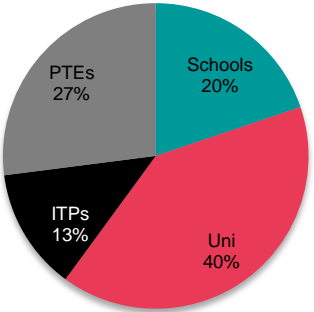


| January RSV |     | January FSV |   | January TSV |     |
|-------------|-----|-------------|---|-------------|-----|
| ↓           | -59 | -31%        | ↓ | -12         | -3% |
| ↓           | -71 | -11%        |   |             |     |

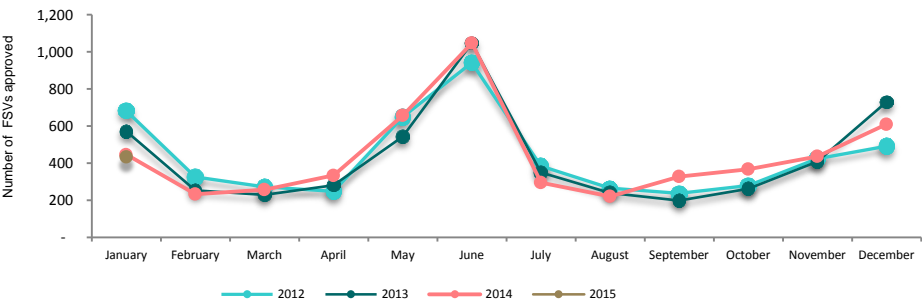
Europe: Total student visas (TSV) 2012 - 2015



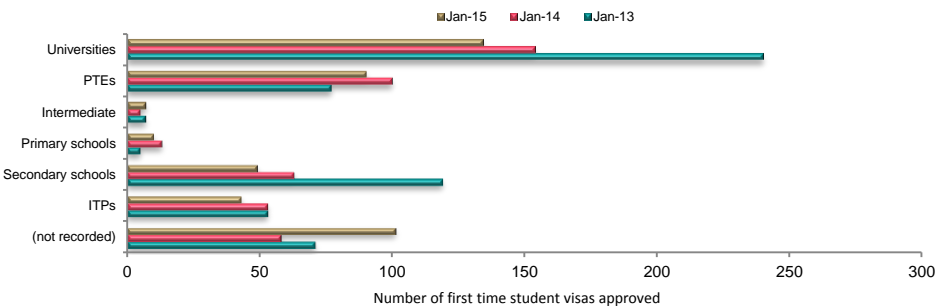
January 2015 sector breakdown of FSVs



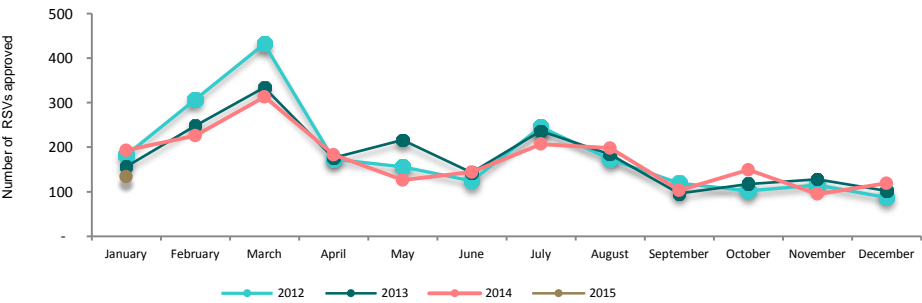
Europe: First time student visas (FSV) 2012 - 2015



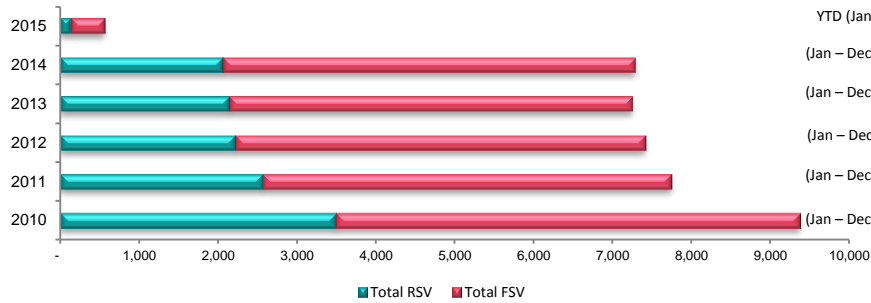
Europe: First time student visas issued by sector, January



Europe: Renewed student visas (RSV) 2012 - 2015



Europe: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- After experiencing a relatively flat 2014, this market has experienced a negative result for January 2015.

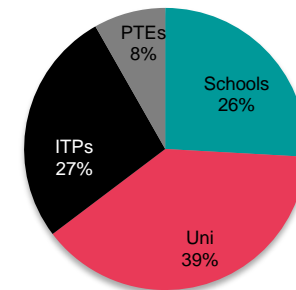
# Germany:

| January RSV |   |    | January FSV |      | January TSV |      |
|-------------|---|----|-------------|------|-------------|------|
| ↑           | 1 | 4% | ↓           | -15  | ↓           | -14  |
|             |   |    |             | -14% |             | -10% |

Germany: Total student visas (TSV) 2012 - 2015



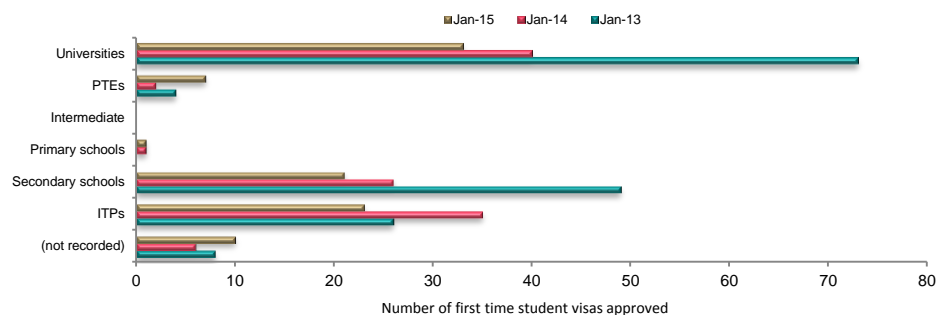
January 2015 sector breakdown of FSVs



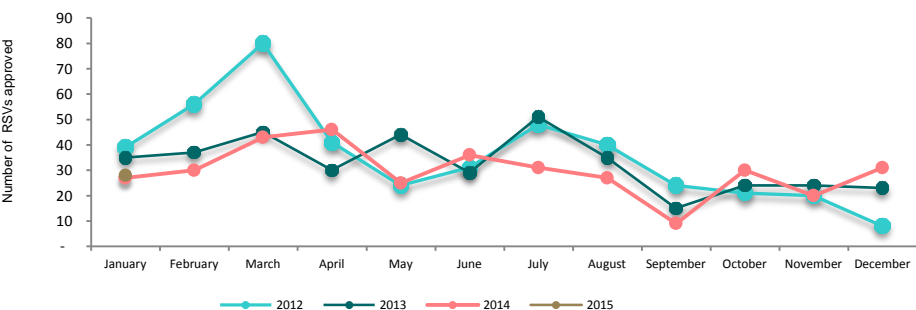
Germany: First time student visas (FSV) 2012 - 2015



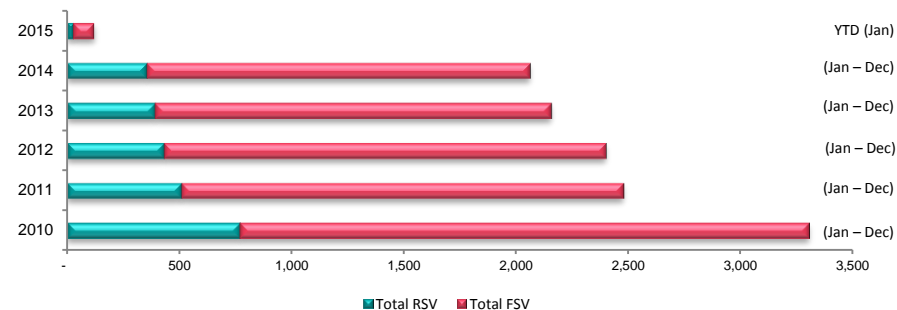
Germany: First time student visas issued by sector, January



Germany: Renewed student visas (RSV) 2012 - 2015



Germany: Cumulative total for RSV vs. FSV 2010 - 2015



## Takeaways:

- After experiencing a relatively flat 2014, this market has experienced a negative result for January 2015.