

# Student Visa Dashboard

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June 2016



- The following dashboard was developed by Education New Zealand (ENZ) 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.

## 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 New Zealand on a working holiday visa who plan on taking up this option are also not included in this dashboard.
- These factors will impact the Private Training Establishments (PTEs), including English Language Schools (ELS) numbers.

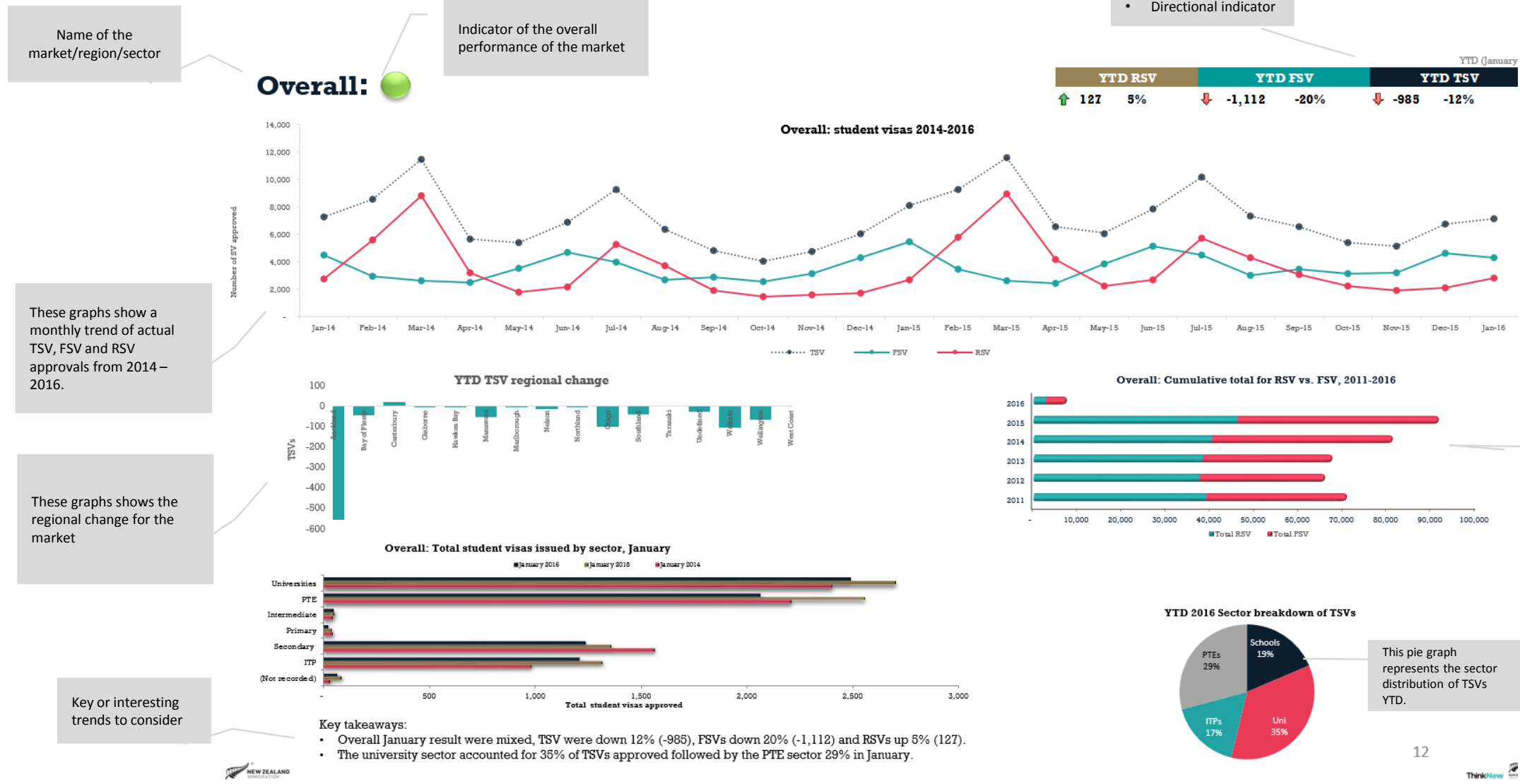
## 2. Student visas vs. enrolments:

- 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



# Overall student visa trends

## June 2016



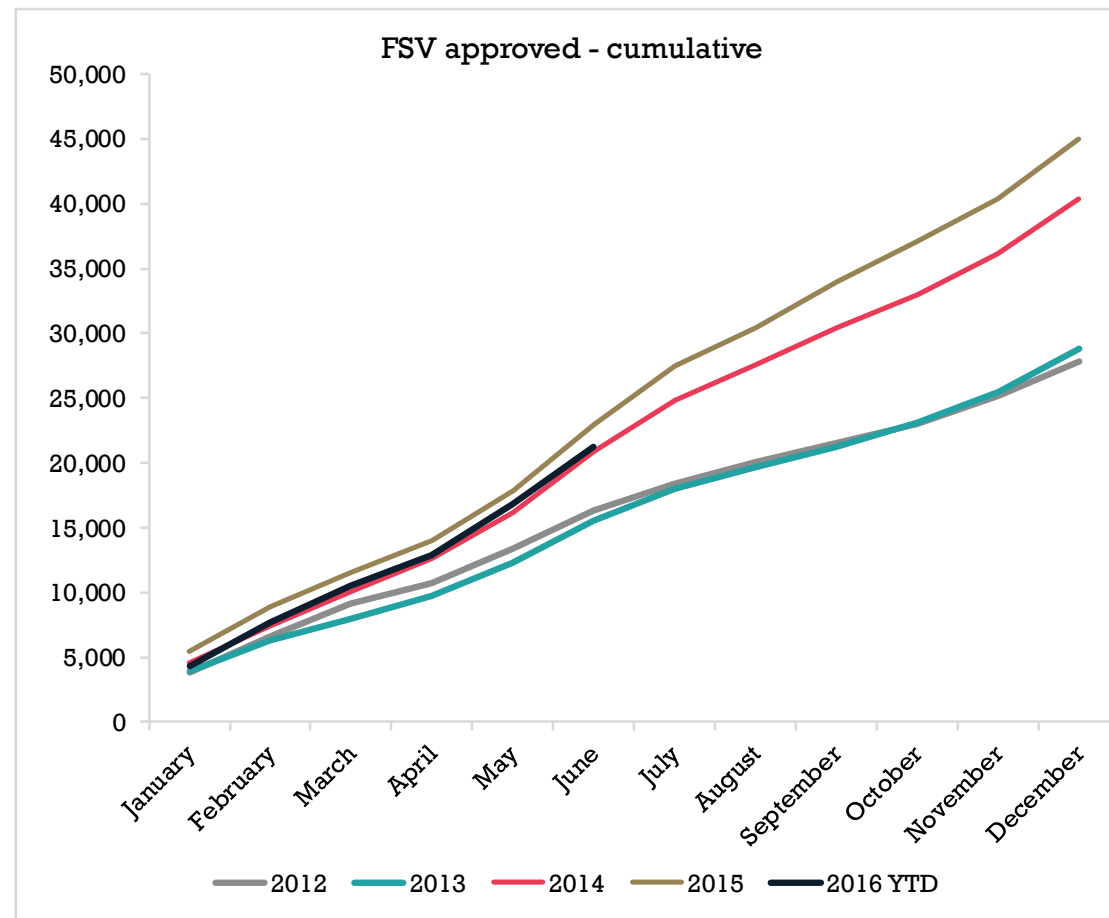
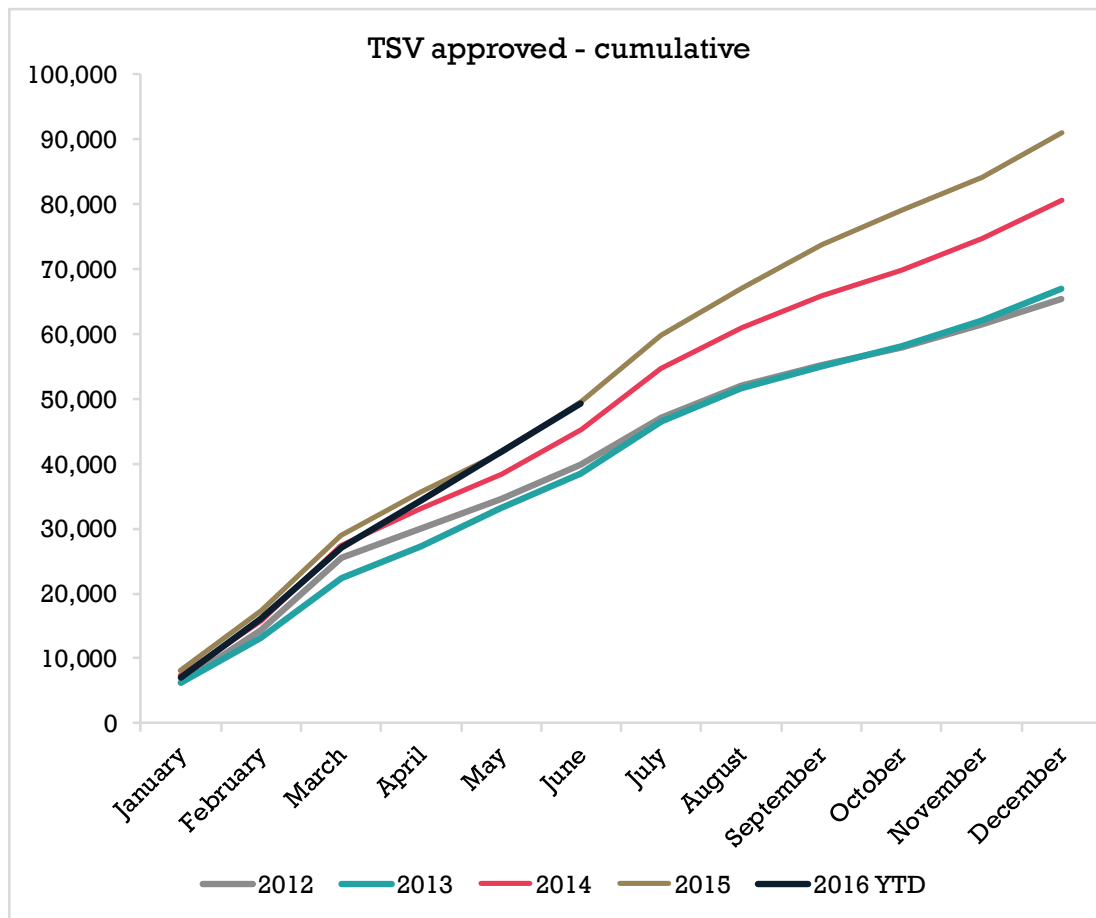
# Executive summary

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1. New Zealand has started to see the initial decline of student visa numbers, felt in the first quarter of 2016, stabilise in the second quarter of 2016. Current YTD figures show that total student visas (TSV) are flat (-0.5%) and first time student visas (FSV) are down 8%. June 2016 experienced a 5% decline for TSV (-419) which was driven by a decline in FSV -15% (-771) compared to June 2015.
2. China and Japan have seen increases of over 100 FSV approved for the first half of 2016 compared to the same period last year. There has also been some promising growth from Korea, Germany, Malaysia, Viet Nam, Indonesia and Nepal.
3. Thailand, the Philippines, USA and Saudi Arabia continue to decline compared to 2015 YTD:
  - Thailand - a large decrease in TSV approved in the first quarter of 2016 (-207) has driven down the YTD performance. June 2016 saw a flat result in TSV (-2,1%) however FSV (-9, 9%) continued to see a decline.
  - Philippines – another country affected by changes to English language requirements - evidenced by the decline in FSV approved YTD (-370, -38%).
  - USA - early processing of visas (approved in late 2015) resulting in fewer visas approved in Jan/Feb 2016. June 2016 saw 49 less visas approved compared to June 2015, however there was a similar increase in visas (+52) approved in April this year, which may suggest early processing of visas is continuing for this market.
  - Saudi Arabia - a 35% reduction in TSV approved YTD (-432). Interestingly there have only been 20 less FSV approved for this market YTD, suggesting that the decline is due to students not returning to, or remaining in New Zealand to study.
4. Most regions saw a decline in TSV approved in June 2016 compared to June 2015. The largest decline was seen in Auckland (-463, -9%), while Wellington saw an increase (+118, 20%).

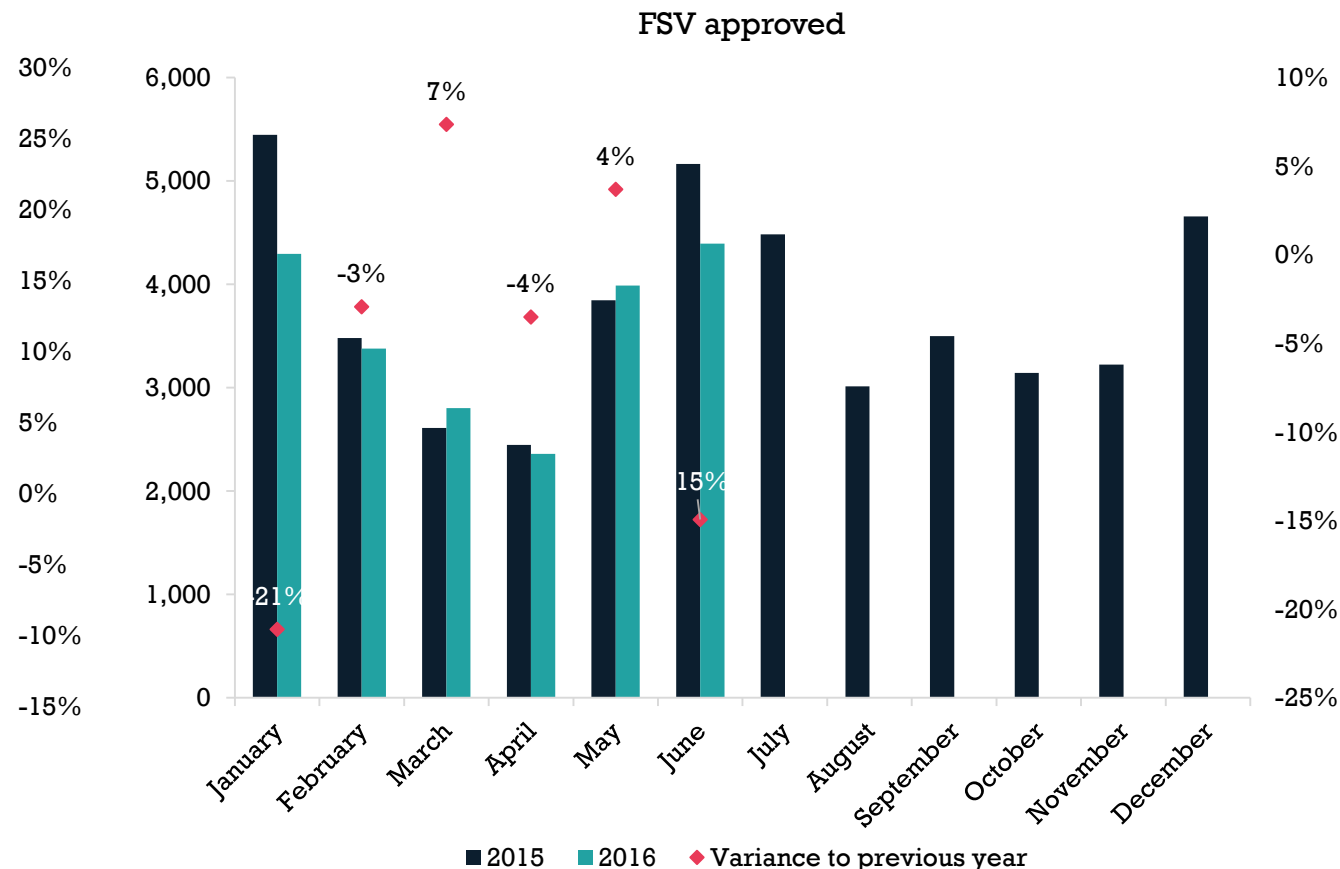
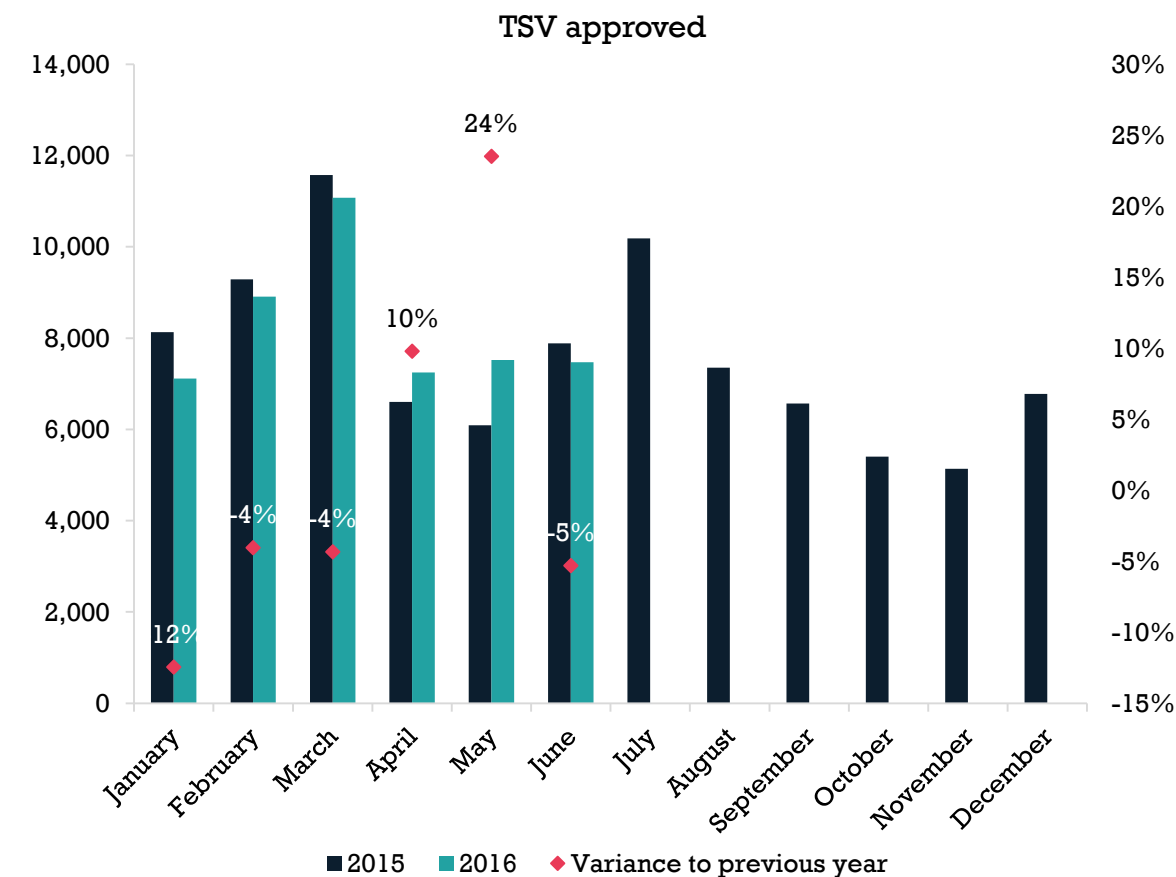


# Comparison to previous year (Cumulative)



- These charts are showing us how student visas (both total and first time) are tracking compared to the previous year.
- Student visa data is tracking close to the same period last year, with 49,332 TSV approved in 2016 YTD compared to 49,568 in 2015 YTD (-0.5%).
- FSV however are down compared to 2015 YTD (-1,775). 21,213 FSV were approved in 2016 YTD compared to 22,988 in 2015 YTD.

# Month-on-Month comparison



- These charts are showing 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 appeared to stabilise, with increases seen in March, April and May.
- June 2016 experienced a 5% decline for TSV (-419) which was driven by a 15% decline in FSV (-771), compared to June 2015.



# Overall market performance (Year-to-Date)

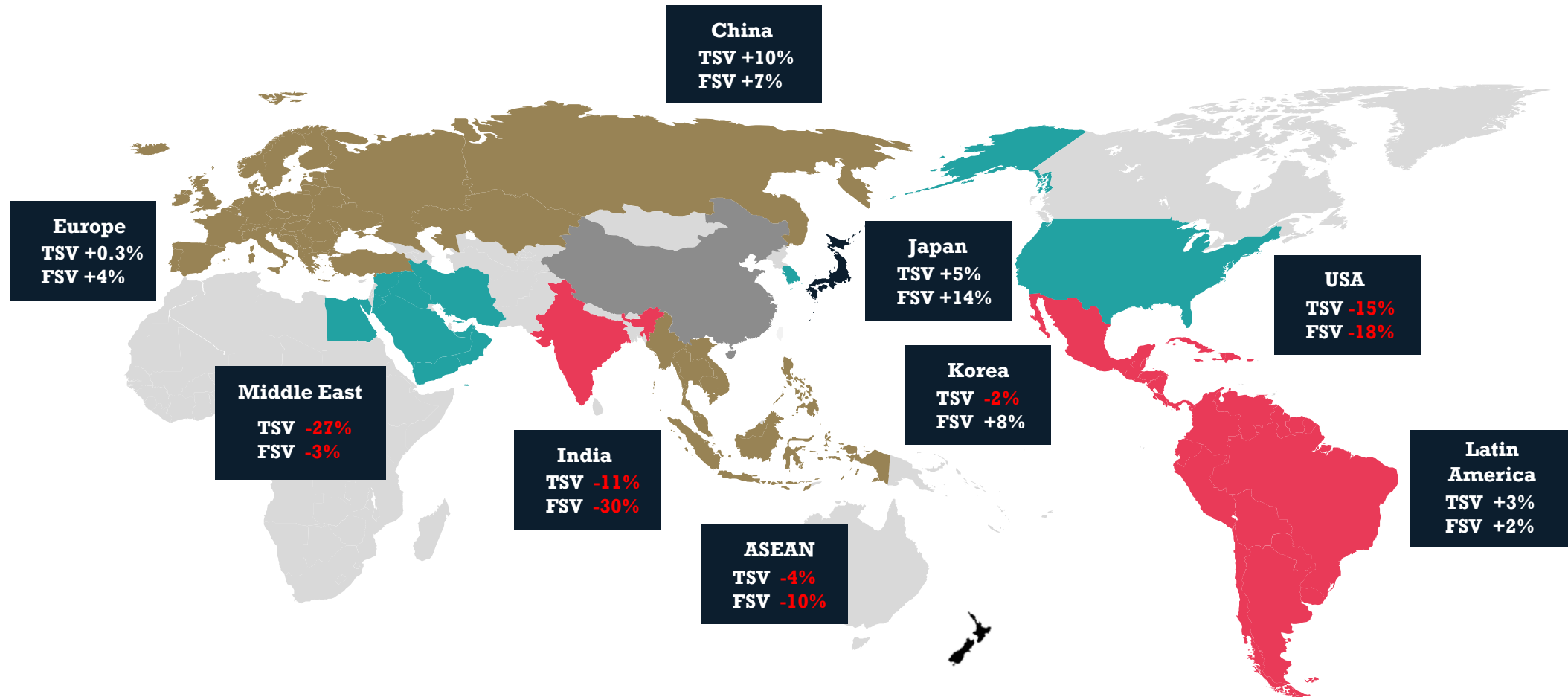
Top 20 markets (in order of 2016 volume)

Indicator	TSV	2015 YTD	2016 YTD	Change in numbers	% change
↑	China	16,161	17,732	1,571	10%
↓	India	10,223	9,136	-1,087	-11%
→	Korea	2,903	2,844	-59	-2%
↑	Japan	1,894	1,986	92	5%
↓	USA	1,909	1,620	-289	-15%
↓	Thailand	1,532	1,419	-113	-7%
↑	Germany	1,027	1,079	52	5%
→	Malaysia	1,005	1,031	26	3%
↑	Viet Nam	915	1,020	105	11%
→	Brazil	1,049	1,010	-39	-4%
↓	Saudi Arabia	1,243	811	-432	-35%
↓	Philippines	1,107	806	-301	-27%
→	Hong Kong	719	695	-24	-3%
→	Taiwan	531	514	-17	-3%
↓	Fiji	535	494	-41	-8%
→	Colombia	493	488	-5	-1%
↑	Indonesia	374	462	88	24%
→	Sri Lanka	443	430	-13	-3%
↑	Nepal	237	361	124	52%
↓	UK	399	332	-67	-17%
→	<b>Grand Total</b>	<b>49,568</b>	<b>49,332</b>	<b>-236</b>	<b>-0.5%</b>

Indicator	FSV	2015 YTD	2016 YTD	Change in numbers	% change
↑	China	4,168	4,440	272	7%
↓	India	6,308	4,409	-1,899	-30%
↓	USA	1,718	1,410	-308	-18%
↑	Korea	1,067	1,155	88	8%
↑	Japan	983	1,121	138	14%
↑	Germany	899	961	62	7%
→	Brazil	868	834	-34	-4%
↓	Philippines	973	603	-370	-38%
↓	Thailand	647	593	-54	-8%
↑	Malaysia	351	433	82	23%
→	Colombia	392	375	-17	-4%
↑	Viet Nam	273	333	60	22%
↑	Chile	231	266	35	15%
↓	UK	284	236	-48	-17%
↑	Indonesia	152	214	62	41%
↑	Fiji	199	212	13	7%
→	Sri Lanka	220	211	-9	-4%
→	France	206	205	-1	0%
↑	Nepal	120	181	61	51%
↓	Saudi Arabia	197	177	-20	-10%
↓	<b>Grand Total</b>	<b>22,988</b>	<b>21,213</b>	<b>-1,775</b>	<b>-8%</b>

- This table shows the changes by top 20 markets for both total and first time visas. It compares 2016 YTD with 2015 YTD.
- The initial decline felt in TSV at the start of 2016 has now stabilised, with TSV flat (-0.5%, -236) YTD.
- FSV continue to experience an overall decline (-8%, -1,775) however this has slowed in recent months. China and Japan have seen increases of over 100 FSV approved this YTD, compared to the same period last year.

# Market overview (Year-to-Date)



- This visual shows the changes by priority markets for both total and first time visas. It compares 2016 YTD with 2015 YTD.
- Some markets are continuing to see improvements YTD, particularly in the number of FSV approved from Japan (+14%), China (+7%), Europe (+4%) and Latin America (+2%).

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

# Market overview (Month-on-Month)

- These tables are showing the largest increases and decreases by markets for both total and first time visas in June 2016 compared to June 2015.
- TSV in June 2016 were down -5%, driven by India and Saudi Arabia (-559 and -68 respectively) compared to June 2015.
- FSV are down 15% in June 2016, however China, Indonesia, Japan, Colombia and the Netherlands saw increases compared to June 2015. India and the Philippines continue to experience the largest decreases in FSV (-683 and -94 respectively).

TSV			FSV		
Markets	Change	% change	Markets	Change	% change
China	239	11%	China	91	9%
Indonesia	59	111%	Indonesia	45	132%
Japan	46	27%	Japan	37	29%
Viet Nam	41	27%	Colombia	17	30%
Colombia	27	39%	Netherlands	16	200%
Germany	-37	-8%	Korea	-26	-13%
USA	-52	-16%	Germany	-34	-8%
Philippines	-55	-22%	USA	-53	-17%
Saudi Arabia	-68	-50%	Philippines	-94	-41%
India	-559	-30%	India	-683	-53%

# Overall regional performance (Year-to-Date)

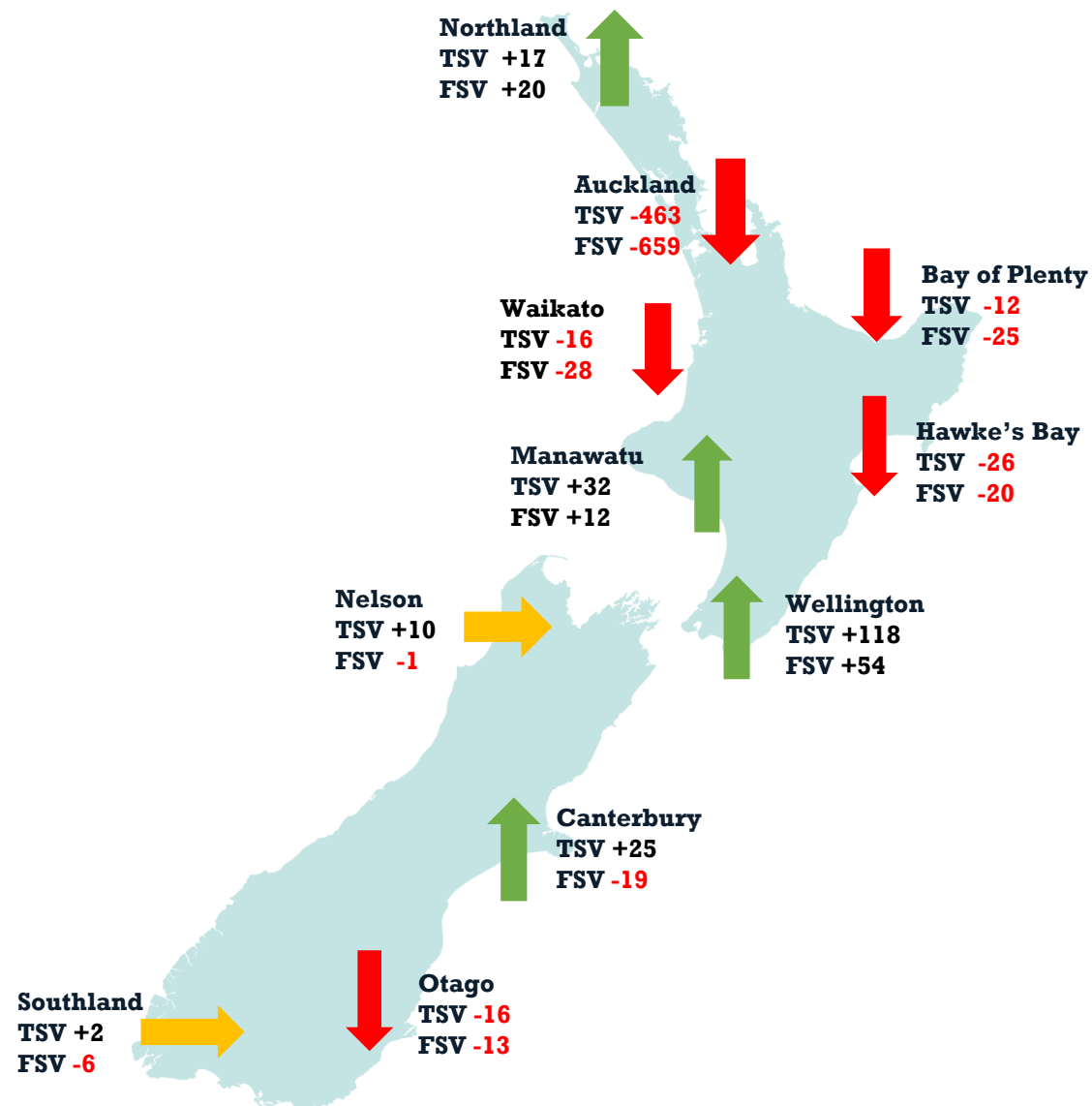
(Listed in order of 2016 volume)

Indicator	TSV	2015 YTD	2016 YTD	Change in numbers	% change
→	Auckland	30,467	29,793	-674	-2%
→	Canterbury	4,490	4,632	142	3%
↑	Wellington	3,321	3,566	245	7%
→	Waikato	3,258	3,223	-35	-1%
→	Otago	2,867	2,817	-50	-2%
→	Manawatu	1,581	1,520	-61	-4%
↑	Bay of Plenty	1,088	1,188	100	9%
↑	Nelson	542	598	56	10%
↑	Southland	522	569	47	9%
↑	Hawke's Bay	451	527	76	17%
→	Taranaki	334	324	-10	-3%
↑	Northland	266	279	13	5%
↓	Other	342	257	-85	-25%
↓	Gisborne	23	16	-7	-30%
↑	Marlborough	6	15	9	150%
→	<b>Grand Total</b>	<b>49,568</b>	<b>49,332</b>	<b>-236</b>	<b>-0.5%</b>

Indicator	FSV	2015 YTD	2016 YTD	Change in numbers	% change
↓	Auckland	13,515	11,856	-1659	-12%
→	Canterbury	2,098	2,111	13	1%
→	Wellington	1,690	1,702	12	1%
↓	Waikato	1,539	1,433	-106	-7%
→	Otago	1,379	1,391	12	1%
↑	Bay of Plenty	604	657	53	9%
→	Manawatu	661	633	-28	-4%
↓	Nelson	378	351	-27	-7%
↑	Hawke's Bay	257	319	62	24%
↓	Southland	281	265	-16	-6%
↓	Other	281	195	-86	-31%
→	Northland	165	165	0	0%
↓	Taranaki	119	110	-9	-8%
↑	Marlborough	5	14	9	180%
↓	Gisborne	9	7	-2	-22%
↓	<b>Grand Total</b>	<b>22,988</b>	<b>21,213</b>	<b>-1775</b>	<b>-8%</b>

- This table shows the changes by New Zealand region for both total and first time visas. It compares 2016 YTD with 2015 YTD.
- Regional performance paints a mixed picture this YTD. Some promising trends are being seen for TSV approved in Wellington, Bay of Plenty, Southland, Hawke's Bay and Nelson.
- For Bay of Plenty and Hawke's Bay, these increases are being driven by FSV (+9%, +24% respectively). For the other regions this is due to students applying for visas in order to extend their study.

# Regional overview (Month-on-Month)



- This visual shows the changes in volume by region for both total and first time visas in June 2016 compared to June 2015.
- Most of the major regions saw a decline in TSV in June 2016. The largest growth in TSV was seen in Wellington (+118), followed by Manawatu (+32) and Canterbury (+25).
- A few regions saw growth FSV this month, including an additional 54 FSV in Wellington (+12%), 20 in Northland (+41%) and 12 in Manawatu (+10%).

# Sector overview (Year-to-Date)



## Primary

TSV -15%  
FSV -28%

## Intermediate

TSV +16%  
FSV +20%

## Secondary

TSV +4%  
FSV +3%

## ITP

TSV +4%  
FSV -5%

## PTE

TSV -6%  
FSV -17%



## University



TSV +2%  
FSV +1%

- This visual shows the changes by sector for both total and first time visas. It compares 2016 YTD with 2015 YTD.
- The PTE sector has experienced the largest decline in TSV approved YTD, down 6% (-1,036). This is being driven by the decline in FSV (-17%, -1,609).
- The secondary school sector has experienced the largest growth YTD, with an additional 302 TSV approved compared to the same period last year. Again this is being driven by FSV (+3%, +117).

# Sector overview (Month-on-month)

- These tables are showing the changes by sector for both total and first time visas in June 2016 compared to June 2015.
- In June 2016, universities and intermediate school sector saw an increase in TSV approved, however the growth was driven by the universities (+201). Both of these sectors also saw an increase in FSV this month.

TSV			
	Sectors	Change	% change
 	Universities	201	10%
	Intermediate	4	15%
	Secondary	-10	-1%
	Primary	-13	-32%
	ITPs	-118	-9%
	PTEs	-408	-13%

FSV			
	Sectors	Change	% change
 	Universities	105	8%
	Intermediate	1	5%
	Primary	-13	-46%
	Secondary	-29	-3%
	ITPs	-223	-23%
	PTEs	-537	-30%



# Trends by market

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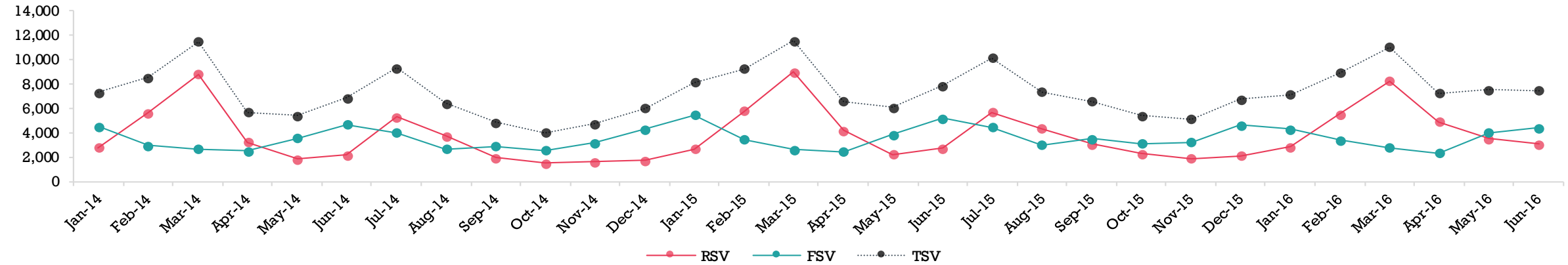
Overall:



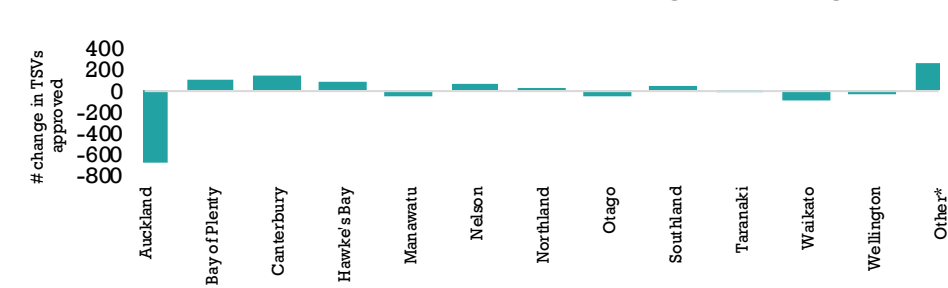
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
352 <span>↑</span> 13%	-771 <span>↓</span> -15%	-419 <span>↓</span> -5%	1,539 <span>↑</span> 6%	-1,775 <span>↓</span> -8%	-236 <span>→</span> -0.5%

YTD (June)

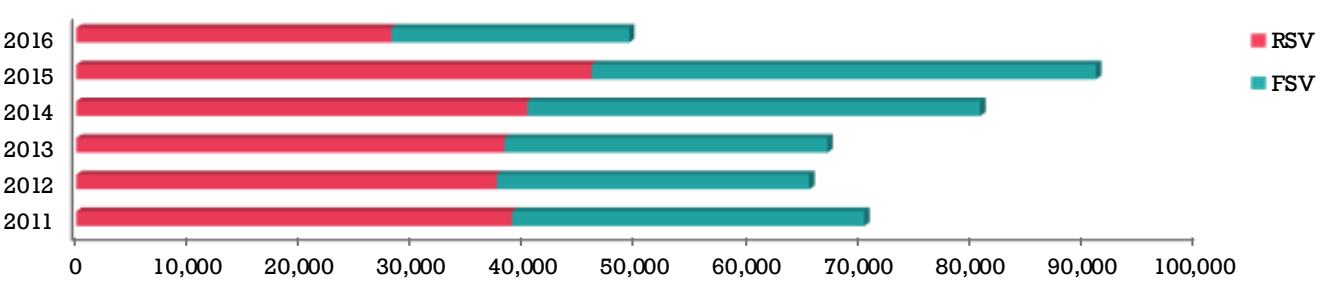
Overall: student visas approved 2014-2016



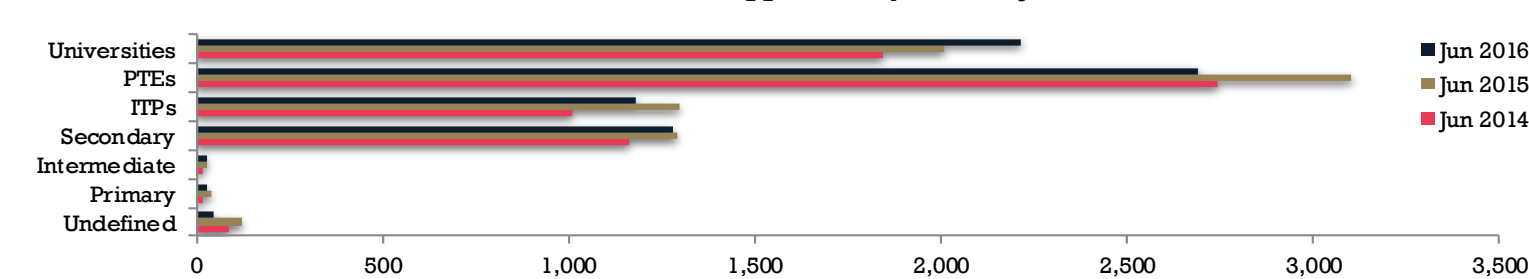
Overall: 2016 YTD TSV regional change



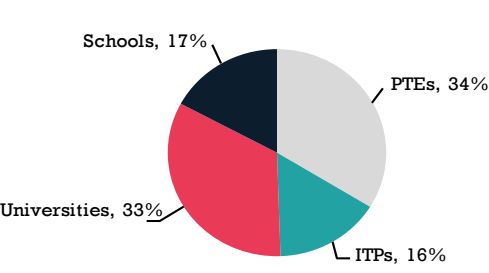
Overall: Cumulative total for RSV vs. FSV, 2011-2016



Overall: Total student visas approved by sector, June



Overall: 2016 YTD Sector breakdown of TSV



Key takeaways:

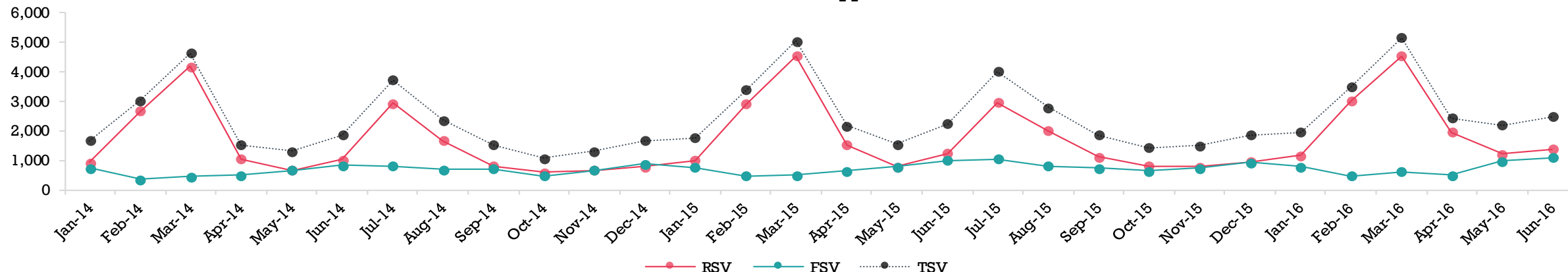
- New Zealand has started to see the initial decline of student visa numbers, felt in the first quarter of 2016, stabilise in April and May 2016.
- Current YTD figures show that total student visas (TSV) are flat (-0.5%) and first time student visas (FSV) are down 8%.
- June 2016 experienced a 5% decline for TSV (-419) driven by a decline in FSV -15% (-771) compared to June 2016.

# China:

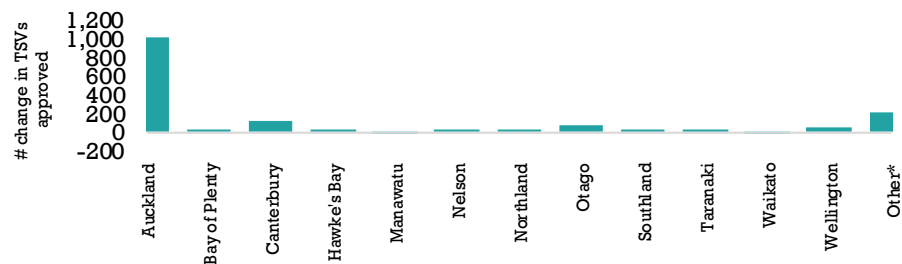


June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV	YTD (June)
148 ↑ 12%	91 ↑ 9%	239 ↑ 11%	1,299 ↑ 11%	272 ↑ 7%	1,571 ↑ 10%	

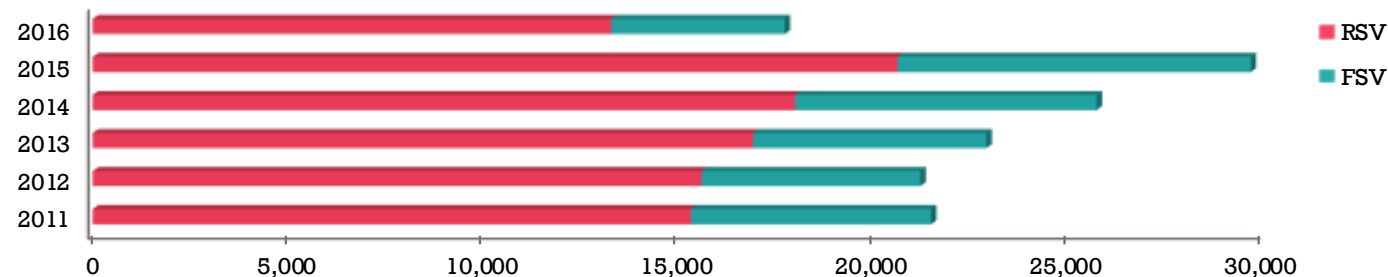
China: student visas approved 2014-2016



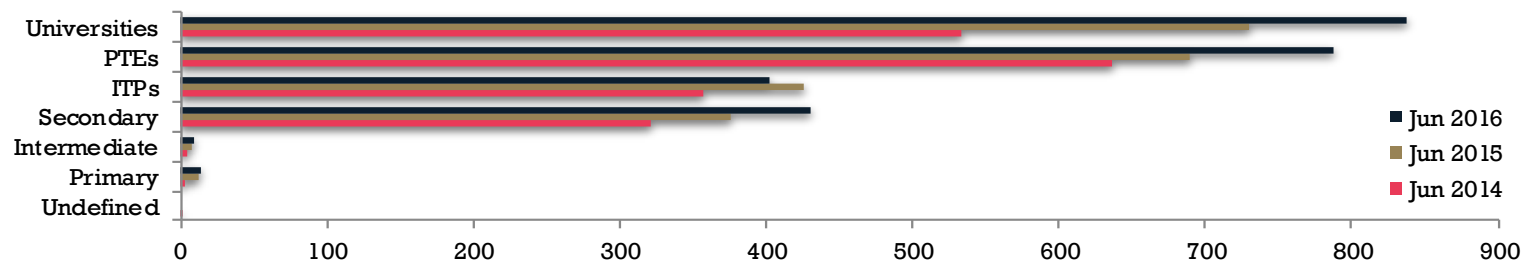
China: 2016 YTD TSV regional change



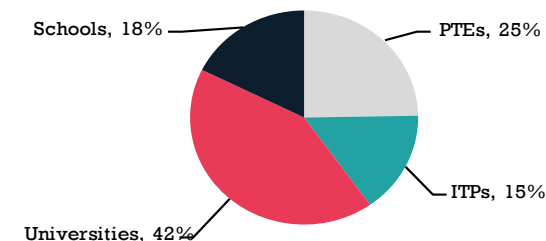
China: Cumulative total for RSV vs. FSV, 2011-2016



China: Total student visas approved by sector, June



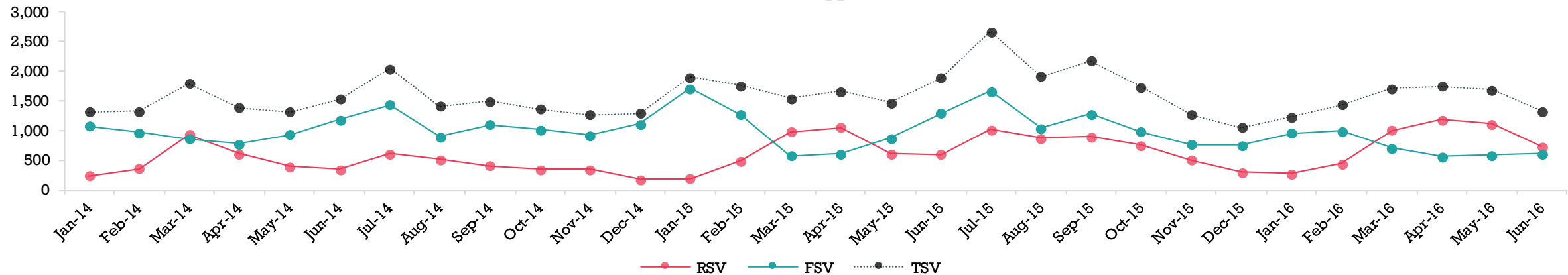
China: 2016 YTD Sector breakdown of TSV



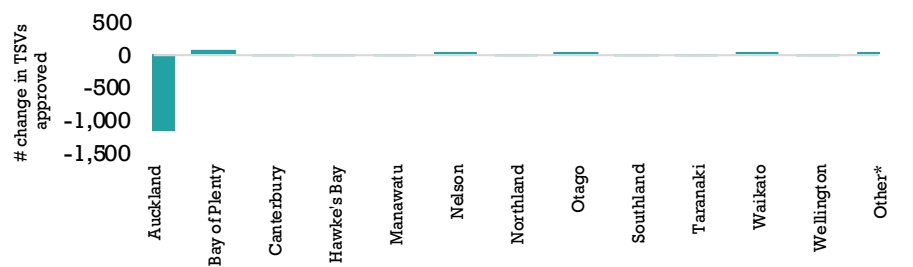
## Key takeaways:

- TSV approved for China has increased by 10% YTD (+1,571). This is being driven by an 11% increase in RSV (+1,299) as well as growth in the number of FSV (+7%, +272).
- In June 2016, the growth in TSV was seen in all sectors except for the ITP sector, compared to June 2015.

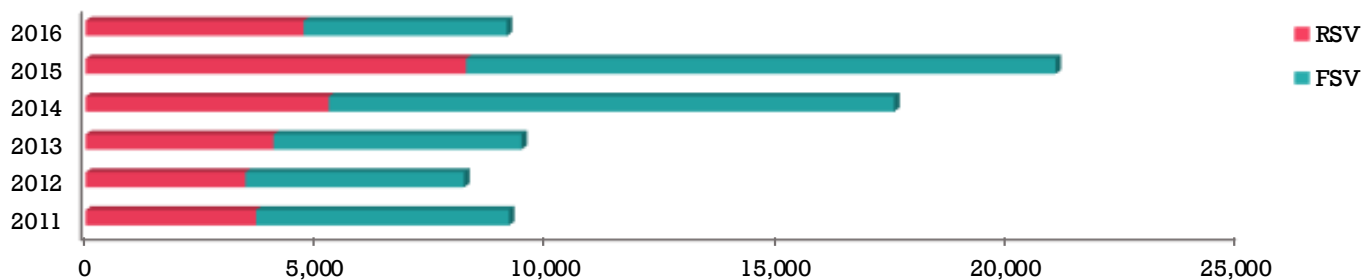
India: student visas approved 2014-2016



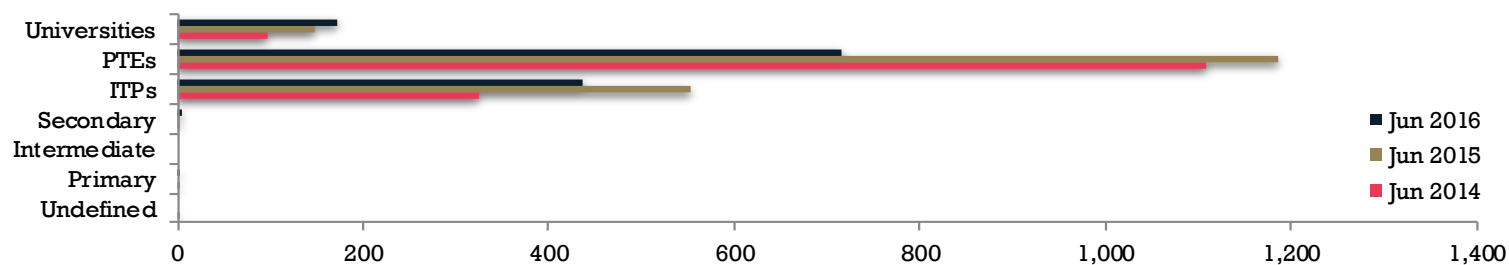
India: 2016 YTD TSV regional change



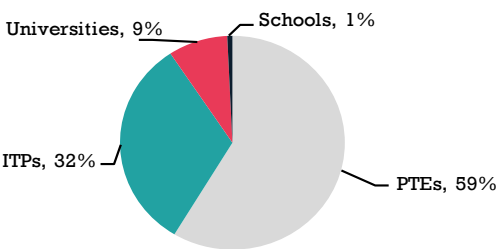
India: Cumulative total for RSV vs. FSV, 2011-2016



India: Total student visas approved by sector, June



India: 2016 YTD Sector breakdown of TSV



Key takeaways:

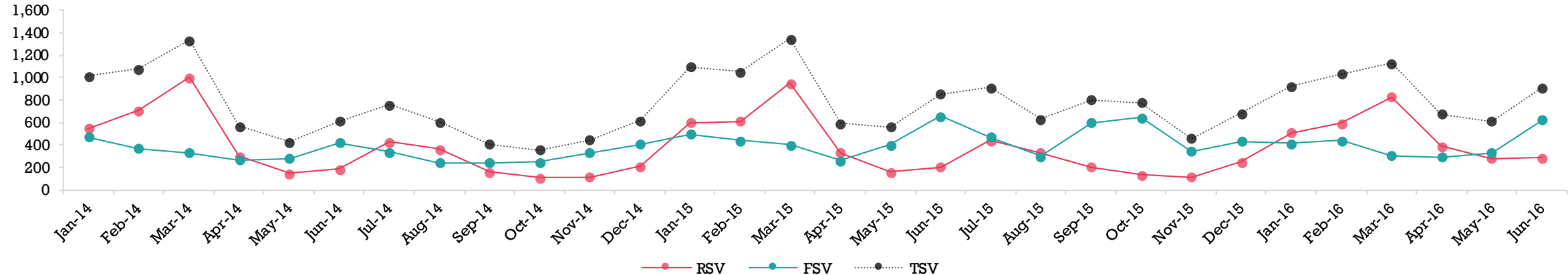
- YTD results for India continue to be much lower than the same period last year, with TSV down 11% (-1,087). This is being driven by a 30% (-1,899) decline in FSV to date, following the change in English language requirements (Rule 18) in 2015.
- However India is seeing an increase in RSV (+21%, +821) suggesting students are choosing to return/remain in New Zealand to study.

# South East Asia: 🍊

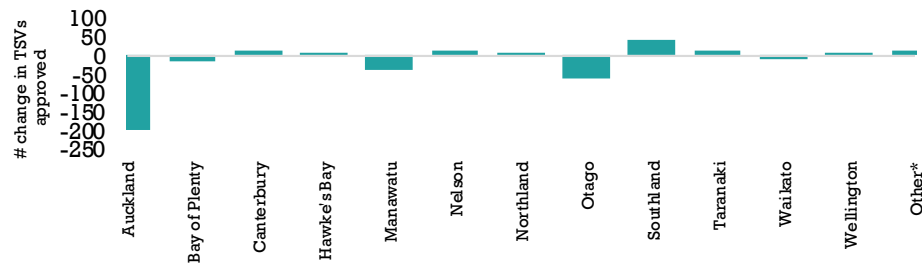
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
86 <span>📈</span> 43%	-30 <span>📉</span> -5%	56 <span>📈</span> 7%	36 <span>👉</span> 1%	-255 <span>📉</span> -10%	-219 <span>👉</span> -4%

YTD (June)

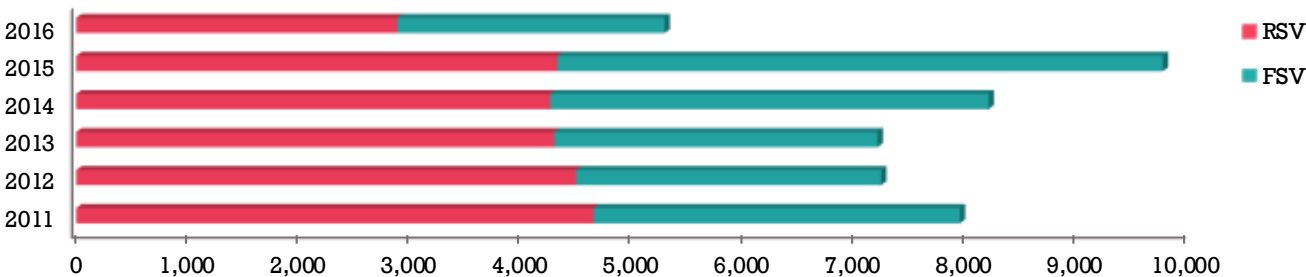
South East Asia: student visas approved 2014-2016



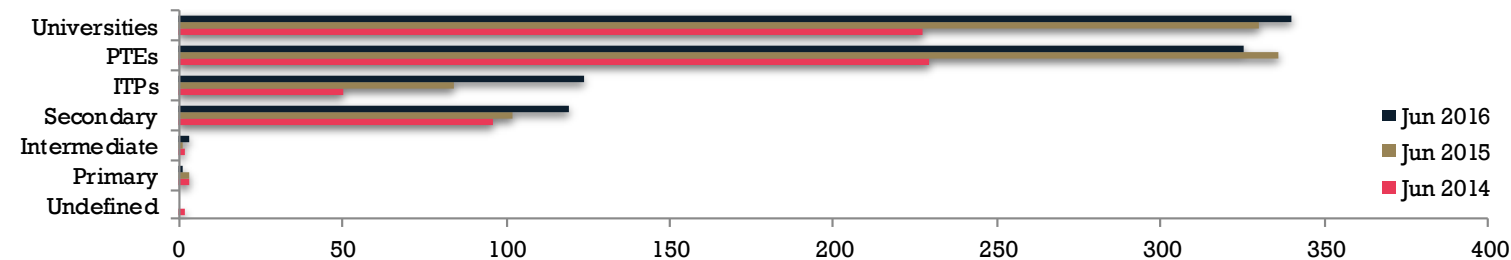
South East Asia: 2016 YTD TSV regional change



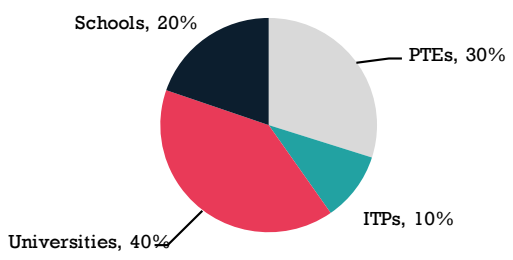
South East Asia: Cumulative total for RSV vs. FSV, 2011-2016



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



South East Asia: 2016 YTD Sector breakdown of TSV



- Key takeaways:
- Results for the South East Asia region are a flat YTD (-4%, -219). While FSV are still tracking down (-10%, -255), RSV have appeared to stabilise 1% (+36).
  - June 2016 TSV saw a positive result up 7% (+56), this was driven by RSV which saw a strong result (+43%; +86) compared to June 2015.
  - So far this year, students from the South East Asia region are choosing to study at universities (40%), schools (20%) and PTEs (30%).

# Malaysia:

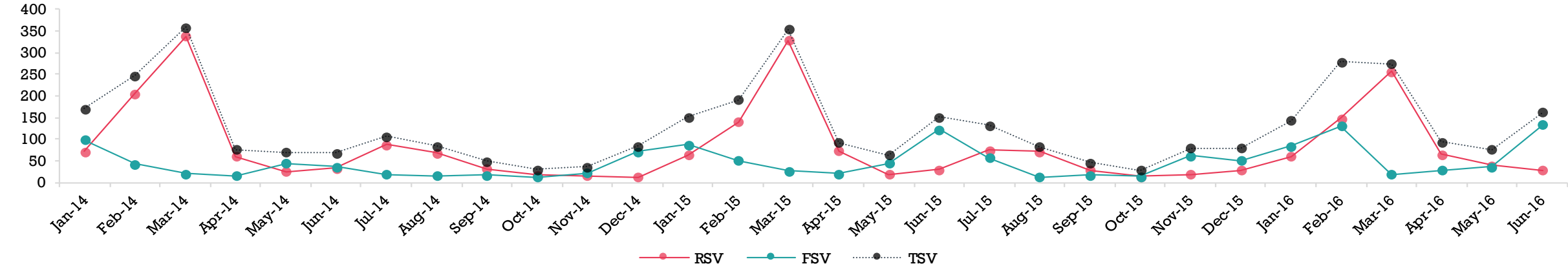


June RSV	June FSV	June TSV
-1 ↘ -3%	12 ↗ 10%	11 ↗ 7%

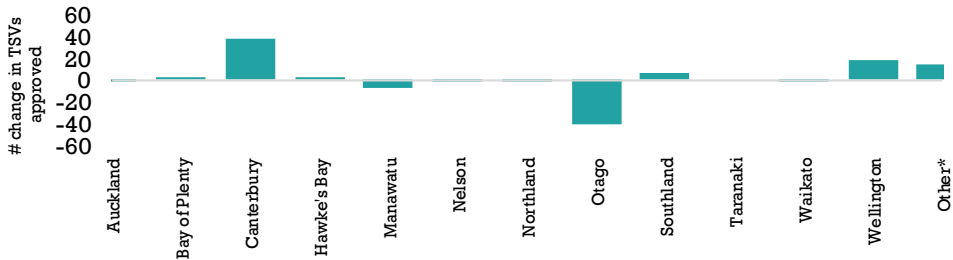
YTD RSV	YTD FSV	YTD TSV
-56 ↘ -9%	82 ↗ 23%	26 ↘ 3%

YTD (June)

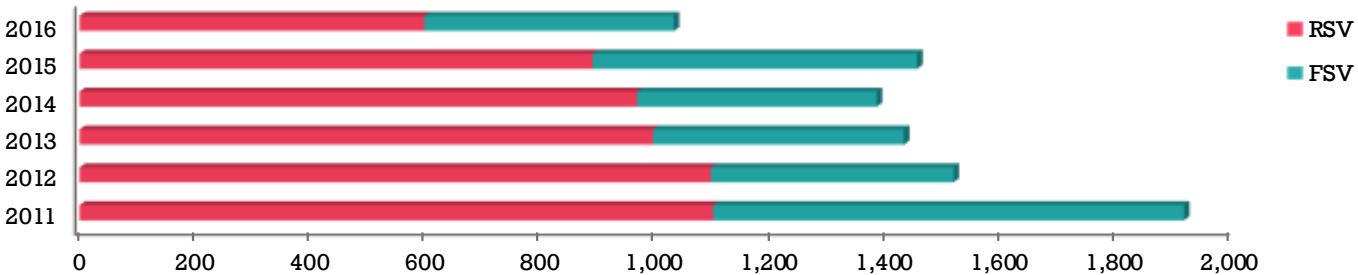
Malaysia: student visas approved 2014-2016



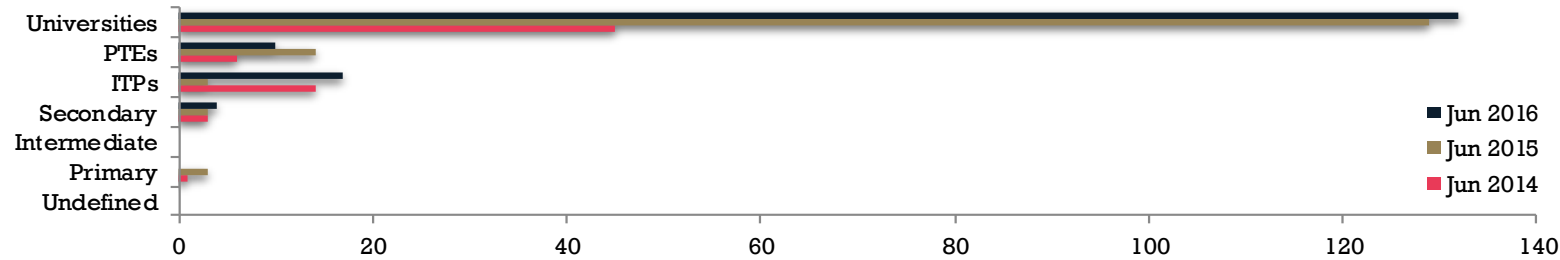
Malaysia: 2016 YTD TSV regional change



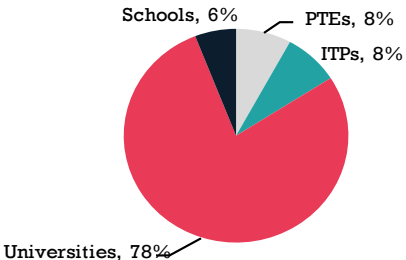
Malaysia: Cumulative total for RSV vs. FSV, 2011-2016



Malaysia: Total student visas approved by sector, June



Malaysia: 2016 YTD Sector breakdown of TSV



## Key takeaways:

- TSV approved for Malaysia remains stable YTD. Although an increase was seen in FSV (+23%, +82), this was offset by a decline in RSV (-9%, -56).
- The university sector made up the majority of TSV approved YTD (78%).
- An increase was evident in the Canterbury and Wellington regions, while Otago saw a decline in Malaysian students YTD.



# Indonesia:

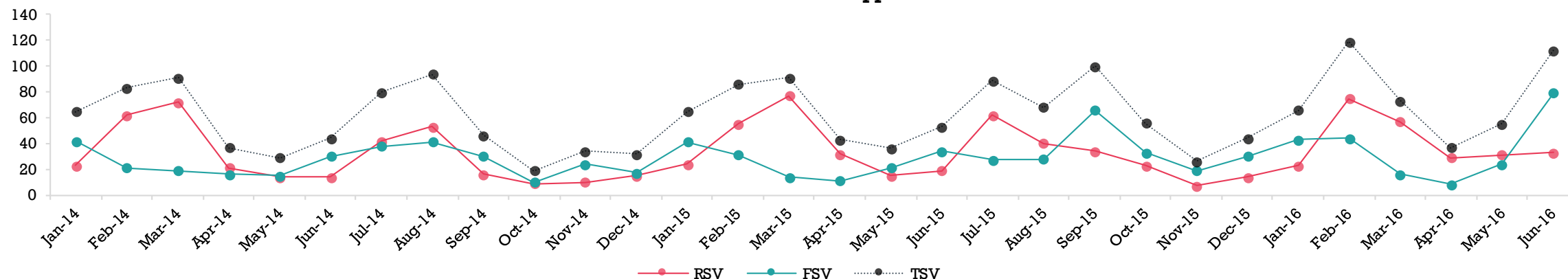


June RSV	June FSV	June TSV
14 <span style="color: green;">↑</span> 74%	45 <span style="color: green;">↑</span> 132%	59 <span style="color: green;">↑</span> 111%

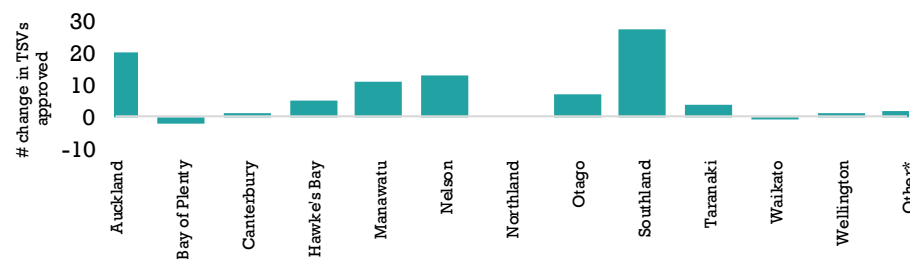
YTD RSV	YTD FSV	YTD TSV
26 <span style="color: green;">↑</span> 12%	62 <span style="color: green;">↑</span> 41%	88 <span style="color: green;">↑</span> 24%

YTD (June)

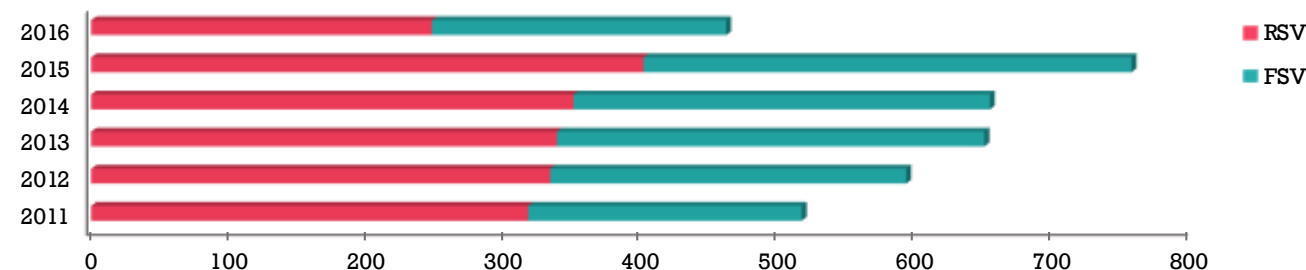
Indonesia: student visas approved 2014-2016



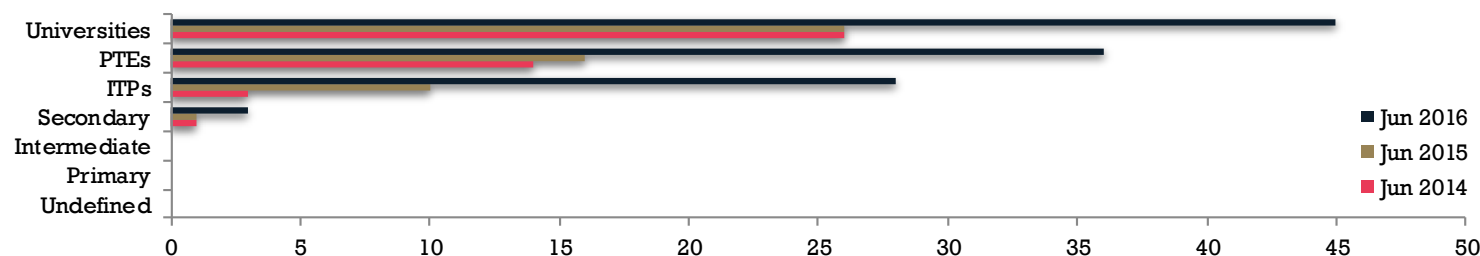
Indonesia: 2016 YTD TSV regional change



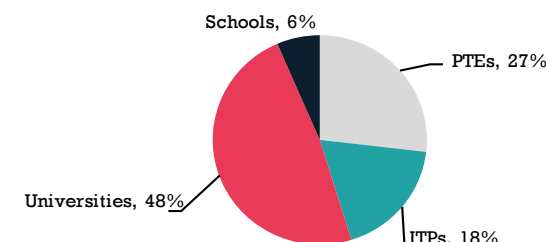
Indonesia: Cumulative total for RSV vs. FSV, 2011-2016



Indonesia: Total student visas approved by sector, June



Indonesia: 2016 YTD Sector breakdown of TSV



## Key takeaways:

- Results for Indonesia are positive YTD, with TSV up 24% (+88). This is being driven by both FSV (+41%) and RSV (+12%). During June 2016, this growth was felt across the tertiary sector, which makes up 94% of all TSV approved YTD.
- The increase in TSV YTD is evident in Auckland, Nelson, Manawatu and Southland regions.



# Thailand:

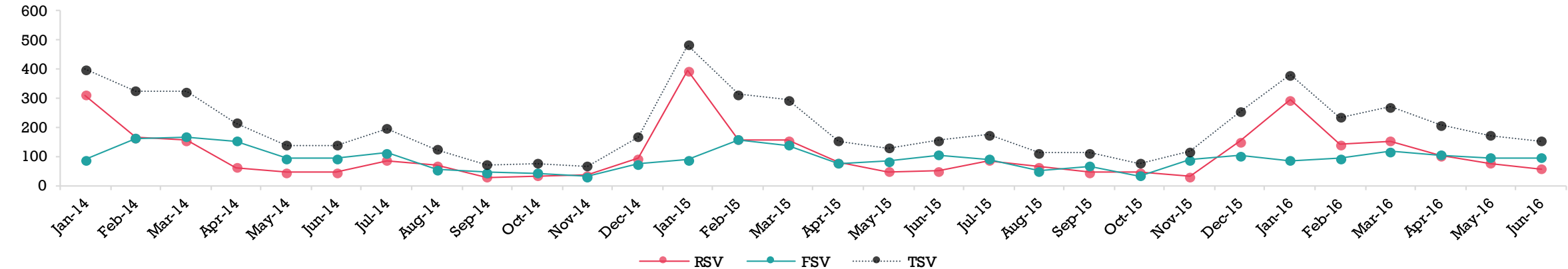


June RSV	June FSV	June TSV
7  14%	-9  -9%	-2  -1%

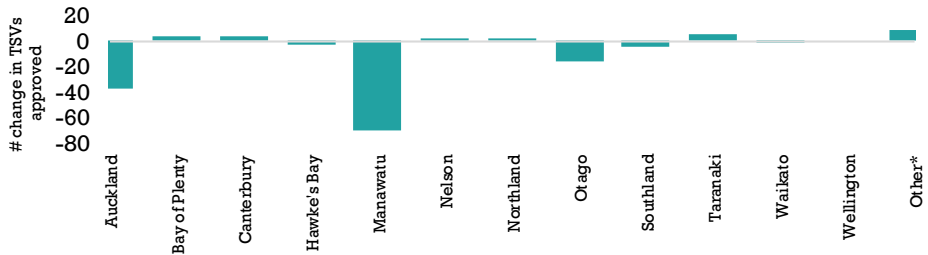
YTD RSV	YTD FSV	YTD TSV
-59  -7%	-54  -8%	-113  -7%

YTD (June)

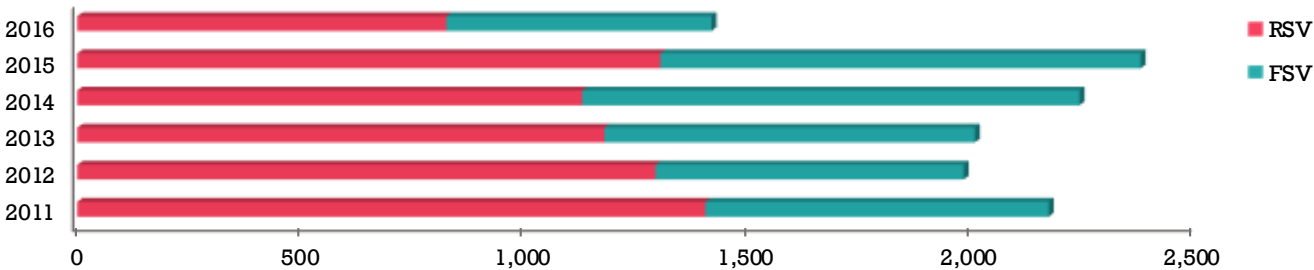
Thailand: student visas approved 2014-2016



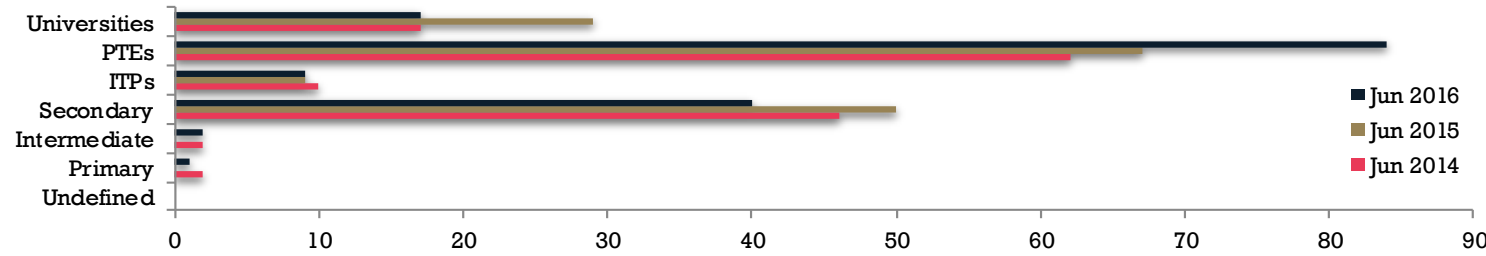
Thailand: 2016 YTD TSV regional change



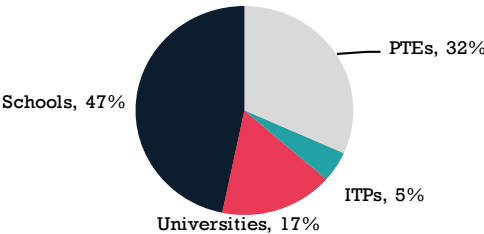
Thailand: Cumulative total for RSV vs. FSV, 2011-2016



Thailand: Total student visas approved by sector, June



Thailand: 2016 YTD Sector breakdown of TSV



## Key takeaways:

- June 2016 saw stable results for Thailand compared to June 2015 with TSV down -1% (-2). However YTD results continue to be lower than the same period last year (TSV down 7%, -113) being driven by a reduction in both RSV and FSV.
- The schools sector make up the majority of TSV approved YTD (47%), followed by the PTE sector with 32%. The decrease in Thai students has been seen in the Auckland and Manawatu regions YTD.

# Viet Nam:



June RSV

30 ↑ 50%

June FSV

11 ↑ 12%

June TSV

41 ↑ 27%

YTD RSV

45 ↑ 7%

YTD FSV

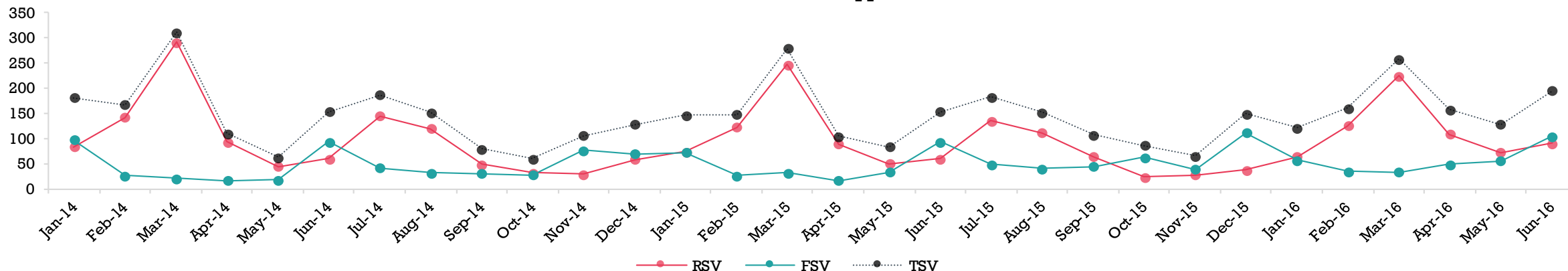
60 ↑ 22%

YTD TSV

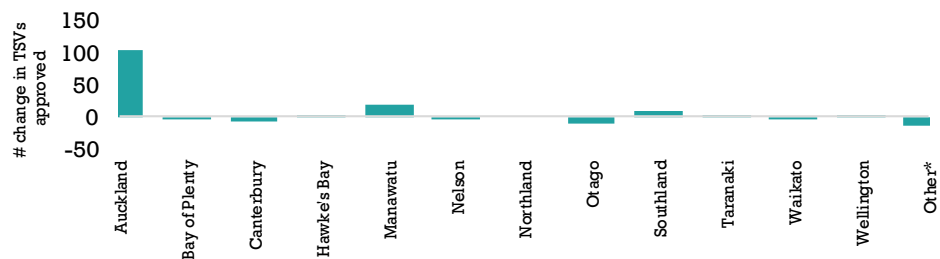
105 ↑ 11%

YTD (June)

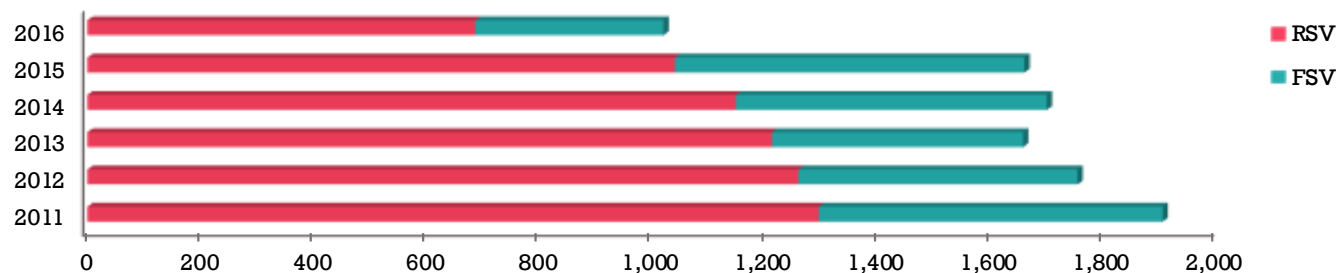
Viet Nam: student visas approved 2014-2016



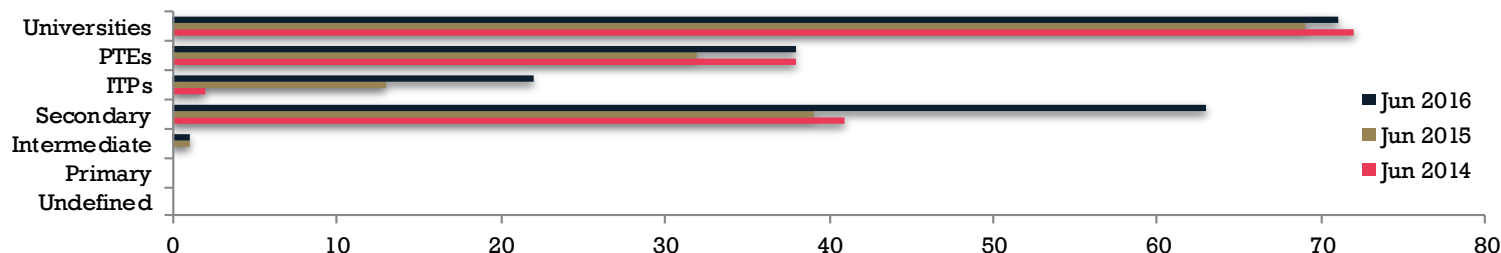
Viet Nam: 2016 YTD TSV regional change



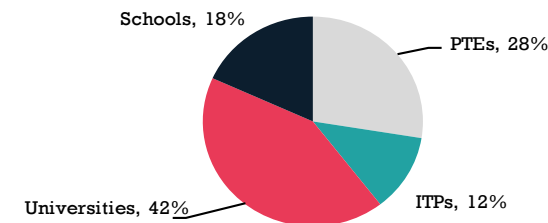
Viet Nam: Cumulative total for RSV vs. FSV, 2011-2016



Viet Nam: Total student visas approved by sector, June



Viet Nam: 2016 YTD Sector breakdown of TSV



## Key takeaways:

- Viet Nam is tracking well YTD with FSV up 22% (+60) and RSV remaining stable (+7%, +45). A strong June saw an additional 11 FSV and 30 RSV approved compared to June 2015.
- 42% of TSV approved were in the university sector and 28% in the PTE sector. The increase in June largely impacted the secondary schools and ITP sectors.

# Philippines:

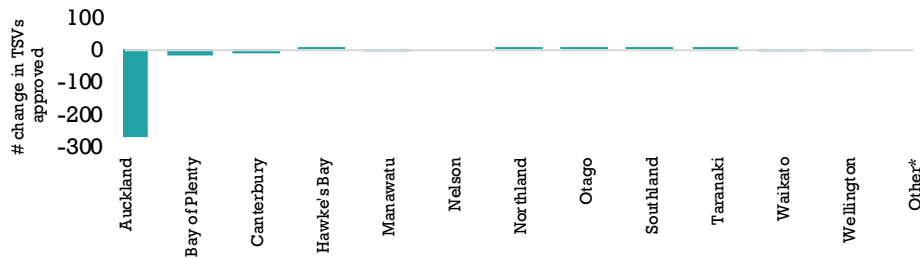
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
39 <span>↑</span> 260%	-94 <span>↓</span> -41%	-55 <span>↓</span> -22%	69 <span>↑</span> 51%	-370 <span>↓</span> -38%	-301 <span>↓</span> -27%

YTD (June)

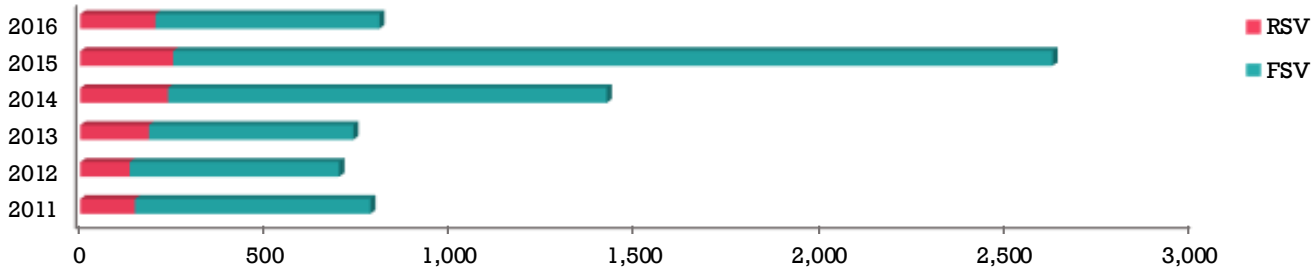
Philippines: student visas approved 2014-2016



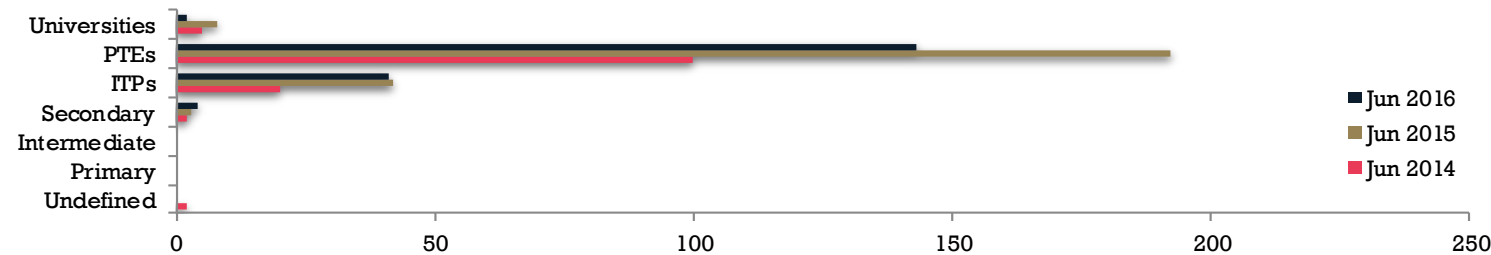
Philippines: 2016 YTD TSV regional change



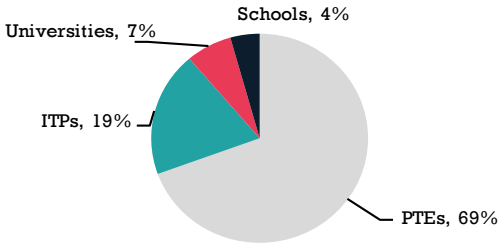
Philippines: Cumulative total for RSV vs. FSV, 2011-2016



Philippines: Total student visas approved by sector, June



Philippines: 2016 YTD Sector breakdown of TSV



## Key takeaways:

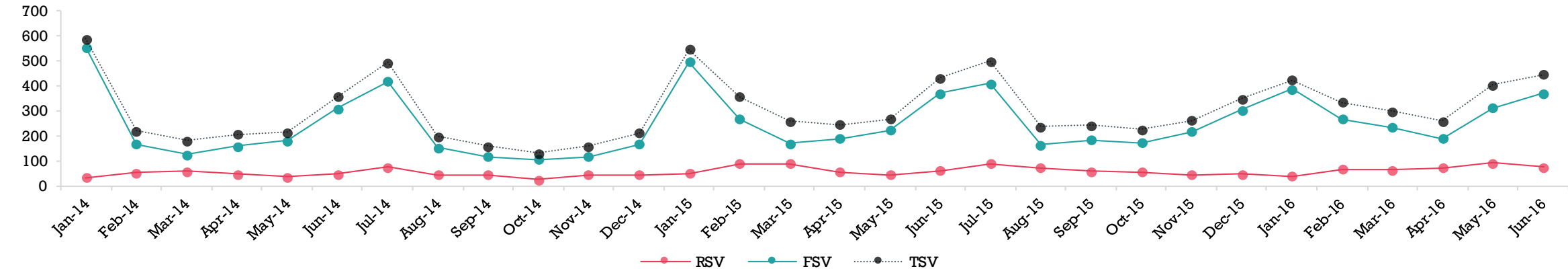
- FSV approved from the Philippines remain down YTD (-38%, -370), further driving down TSV (-27%, -301). This decline follows an exceptional year of growth that would be hard to match. The change in English language requirements (Rule 18) that took place in 2015 has had an immediate effect on the number of student visas from the Philippines. This is a changing market and we expect to see an increase in students studying towards degree and postgraduate studies. 96% of TSV approved were in the tertiary sector.

# Latin America:

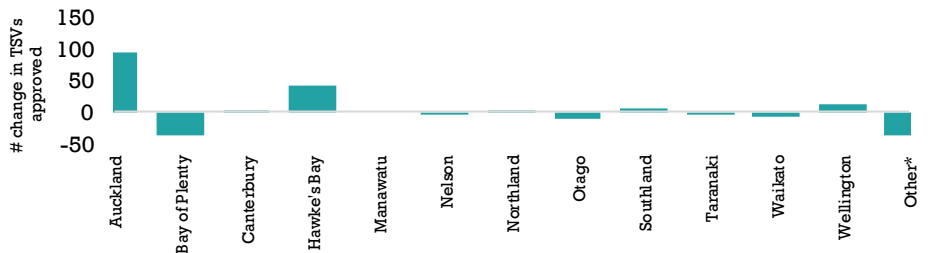
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
14  23%	-1  0%	13  3%	20  5%	42  2%	62  3%

YTD (June)

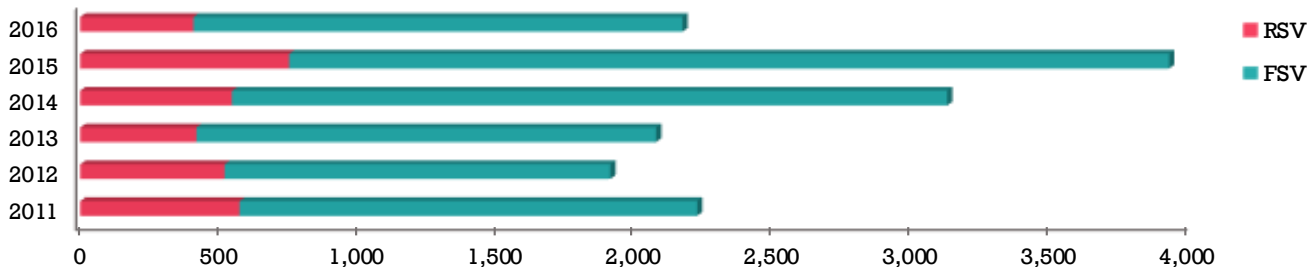
Latin America: student visas approved 2014-2016



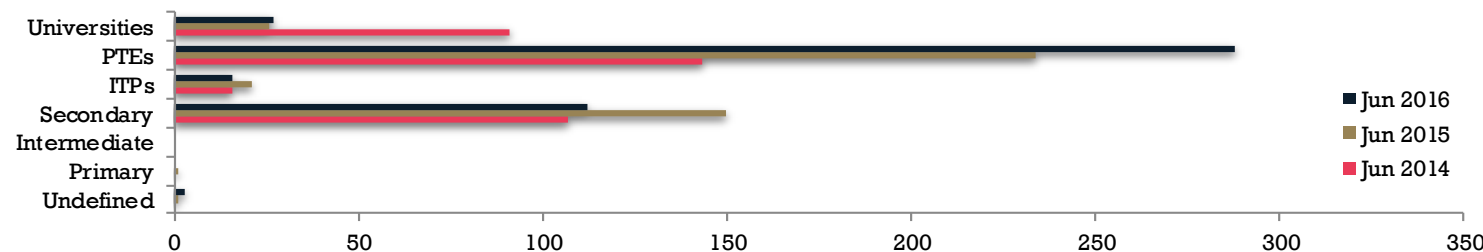
Latin America: 2016 YTD TSV regional change



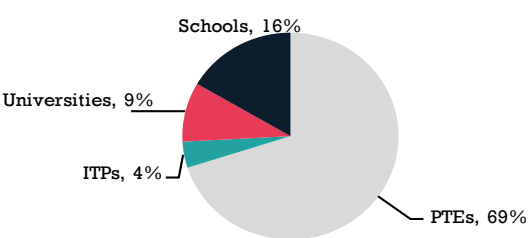
Latin America: Cumulative total for RSV vs. FSV, 2011-2016



Latin America: Total student visas approved by sector, June



Latin America: 2016 YTD Sector breakdown of TSV



Key takeaways:

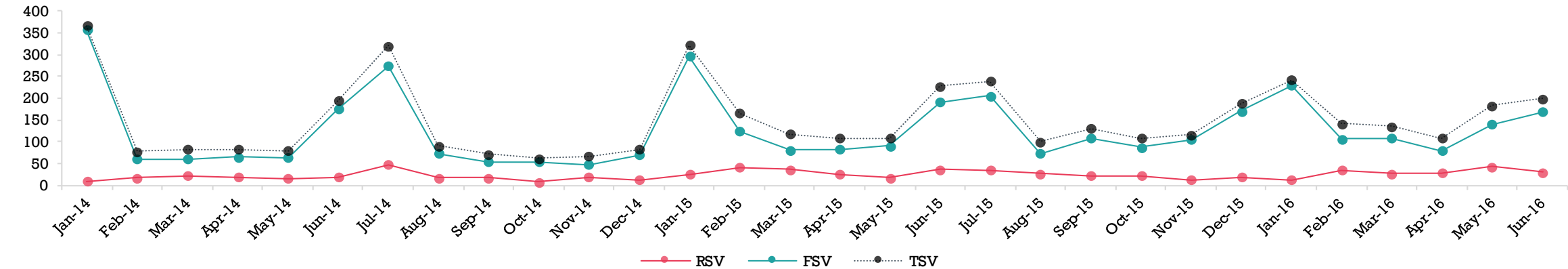
- The Latin America region has stabilised YTD (+3%, +62). The additional 62 visas seen so far this year are being driven by RSV, up 5% YTD and 23% for June.
- The PTE sector accounts for the majority of TSV approved YTD (69%), followed by the schools sector with 16%.



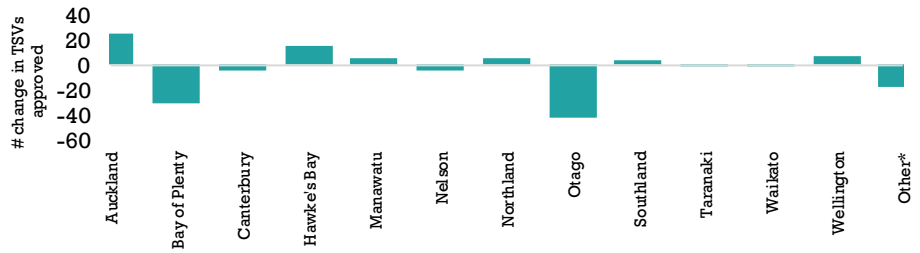
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
-6 ↓ -17%	-23 ↓ -12%	-29 ↓ -13%	-5 → -3%	-34 → -4%	-39 → -4%

YTD (June)

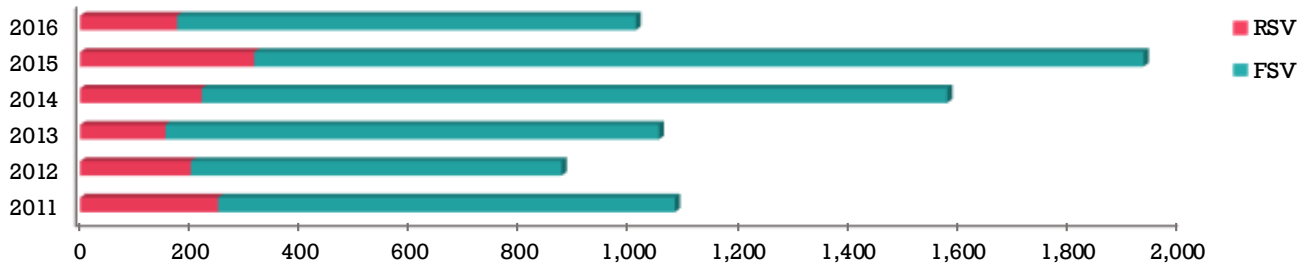
Brazil: student visas approved 2014-2016



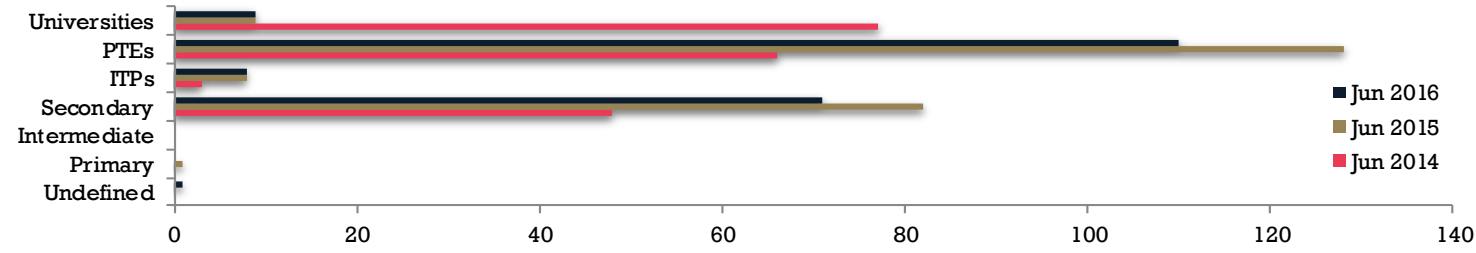
Brazil: 2016 YTD TSV regional change



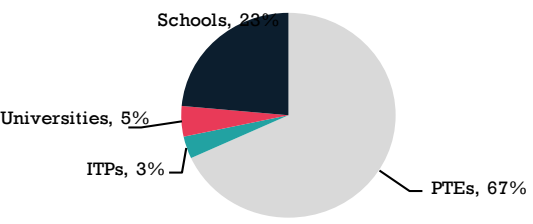
Brazil: Cumulative total for RSV vs. FSV, 2011-2016



Brazil: Total student visas approved by sector, June



Brazil: 2016 YTD Sector breakdown of TSV



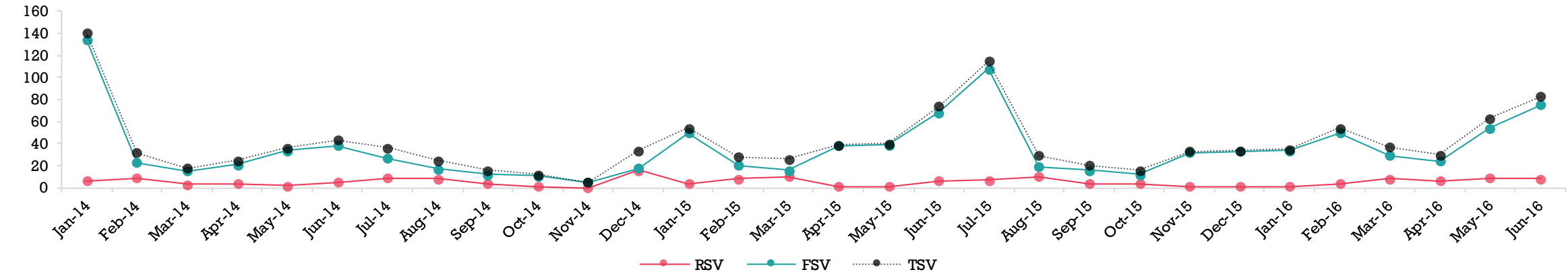
- Key takeaways :
- Brazil results have stabilised YTD despite TSV being down for June 2016 (-13%, -29). The decline in June was driven by both FSV (-12%) and RSV (-17%) compared to June 2015.
  - The Brazilian government-funded scholarship scheme 'Science Without Borders' (SWB) was put on hold in early-2015 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 New Zealand 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 in New Zealand through SWB.



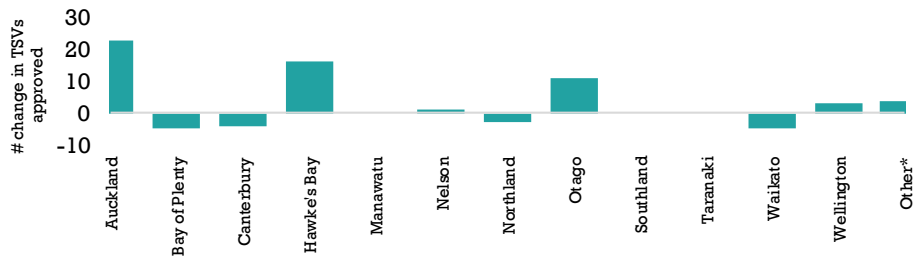
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
2  33%	7  10%	9  12%	6  20%	35  15%	41  16%

YTD (June)

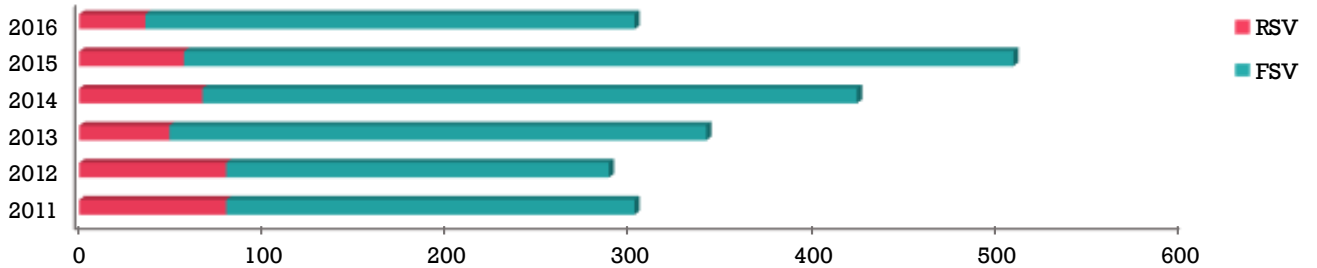
Chile: student visas approved 2014-2016



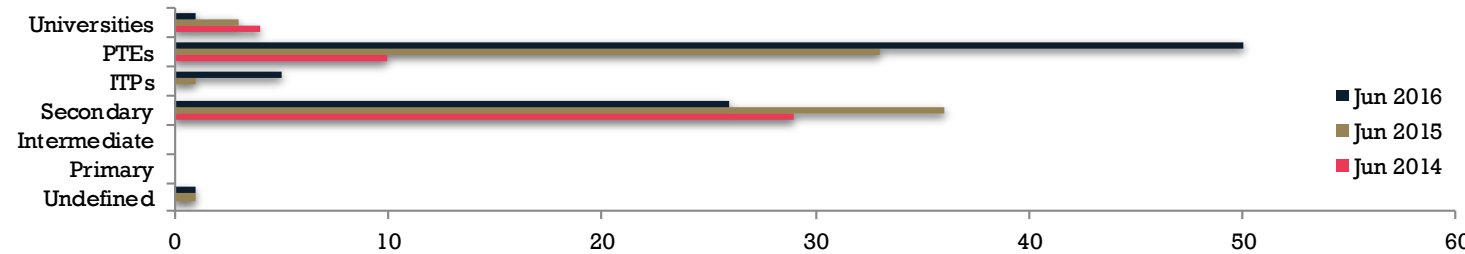
Chile: 2016 YTD TSV regional change



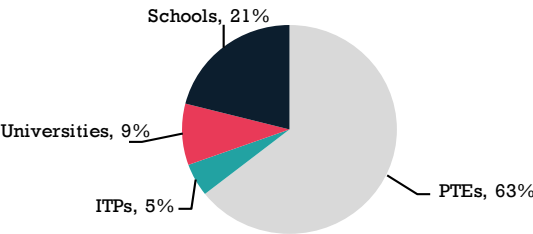
Chile: Cumulative total for RSV vs. FSV, 2011-2016



Chile: Total student visas approved by sector, June



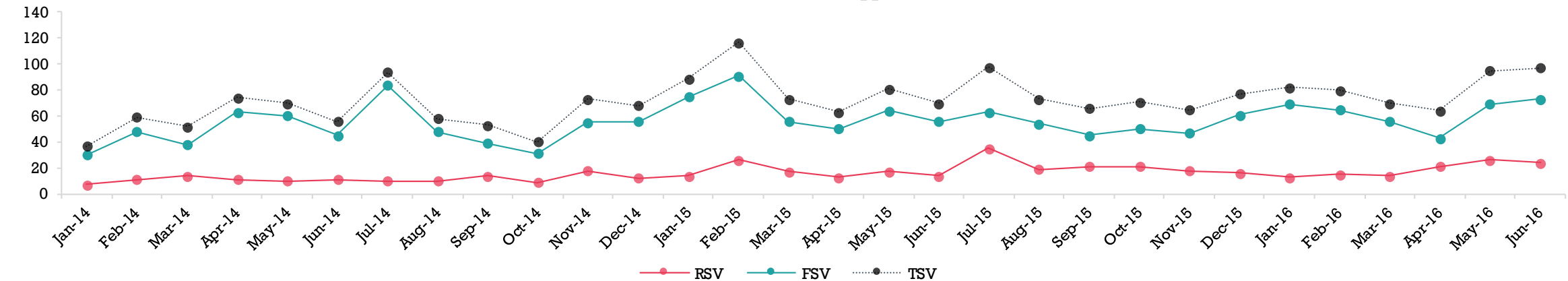
Chile: 2016 YTD Sector breakdown of TSV



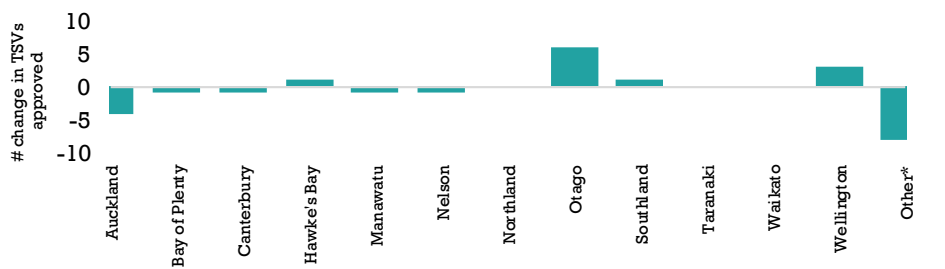
Key takeaways:

- There have been an additional 41 visas approved for students visa from Chile so far this year (+16%) and this growth has been felt in Auckland, Hawke's Bay and Otago.
- Students from Chile are also choosing to remain in New Zealand to study, with RSV up 20% YTD. 63% of Chilean students are choosing to study at PTEs so far this year.

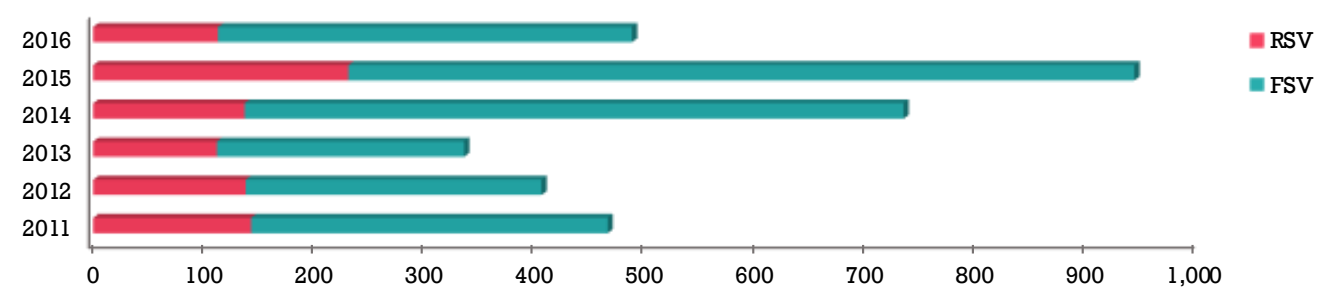
Colombia: student visas approved 2014-2016



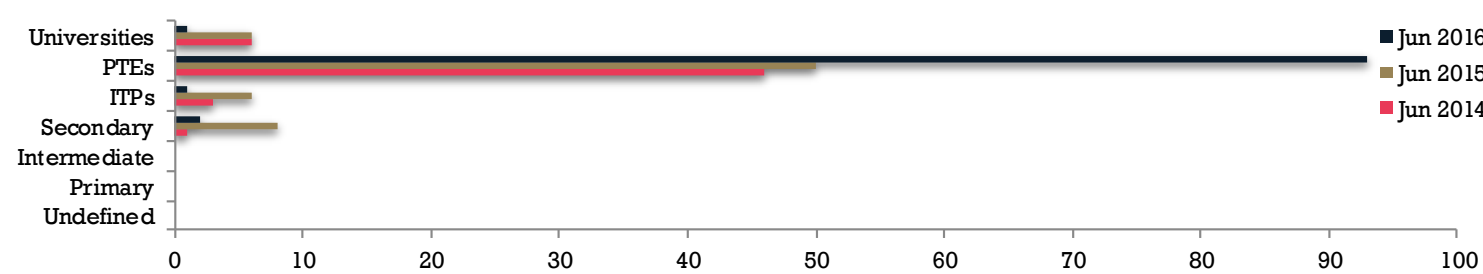
Colombia: 2016 YTD TSV regional change



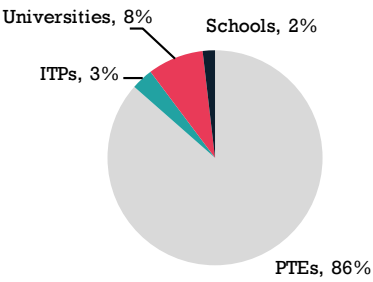
Colombia: Cumulative total for RSV vs. FSV, 2011-2016



Colombia: Total student visas approved by sector, June



Colombia: 2016 YTD Sector breakdown of TSV



- Key takeaways:
- Results for Colombia are flat YTD, driven by FSV (-4%, -17). Similarly to the USA, the YTD decline is not reflective of the market, as there was an increase in TSV approved in the last quarter 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.
  - June 2016 results were positive for Colombia, TSV up 39% (+27), driven by growth in FSV +30% (+17).

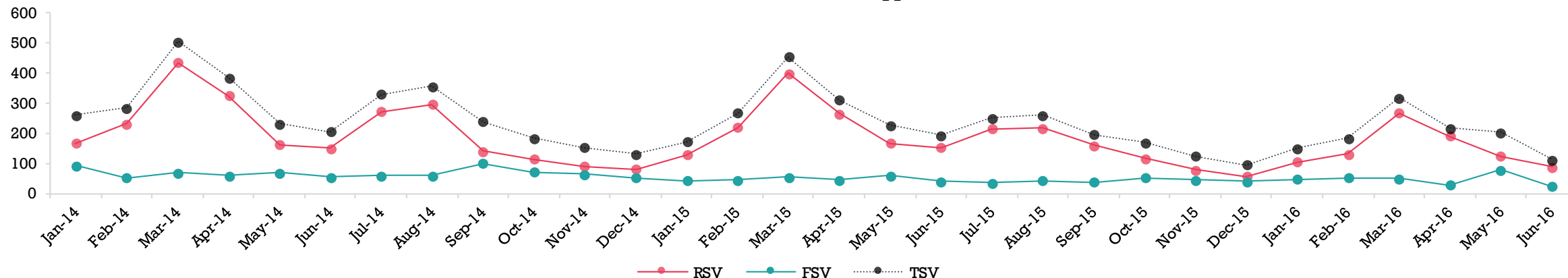


# Middle East:

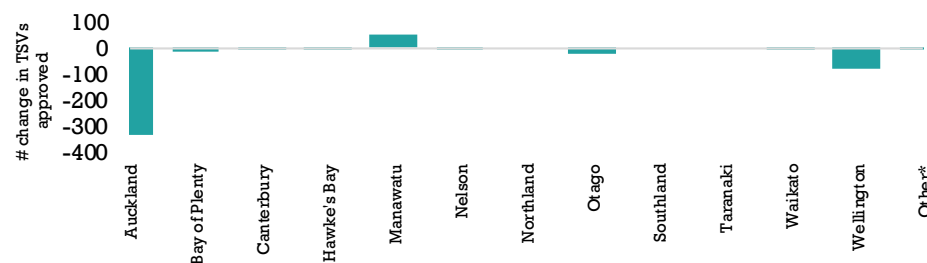


YTD (June)

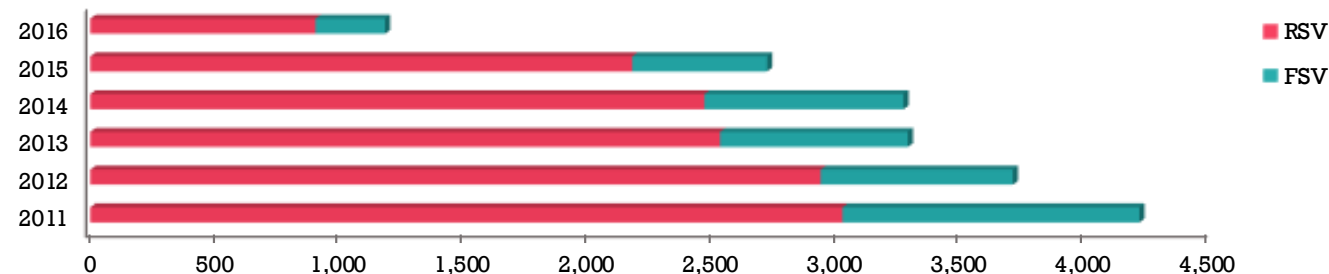
Middle East: student visas approved 2014-2016



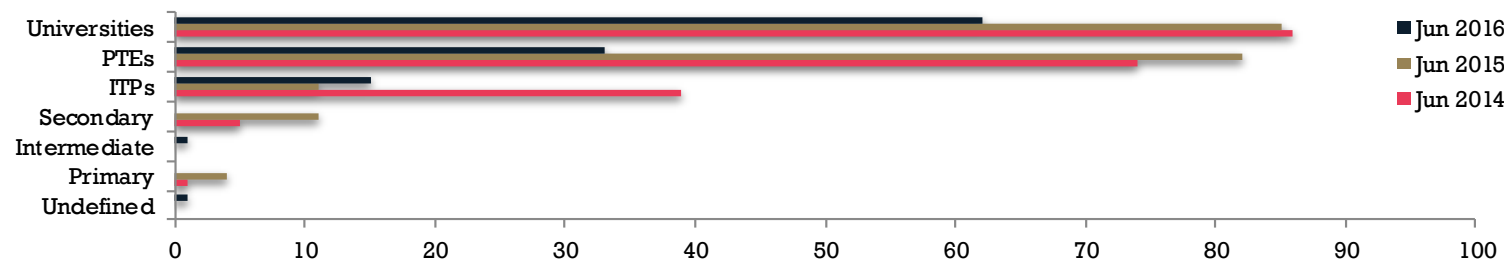
Middle East: 2016 YTD TSV regional change



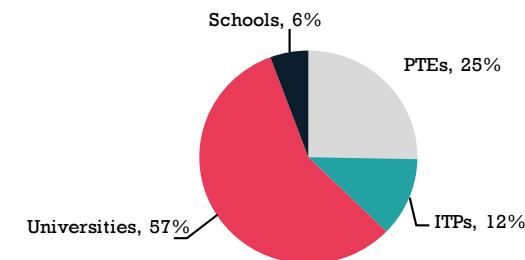
Middle East: Cumulative total for RSV vs. FSV, 2011-2016



Middle East: Total student visas approved by sector, June



Middle East: 2016 YTD Sector breakdown of TSV



## Key takeaways:

- Results continue to be down for the Middle East as reductions in scholarship programme intakes take effect, particularly from Saudi Arabia, down 35% (-432). FSV from Iran however are up 36% YTD (+16).
- The university sector accounts for 57% of TSV approved followed by the PTE sector with 25%.

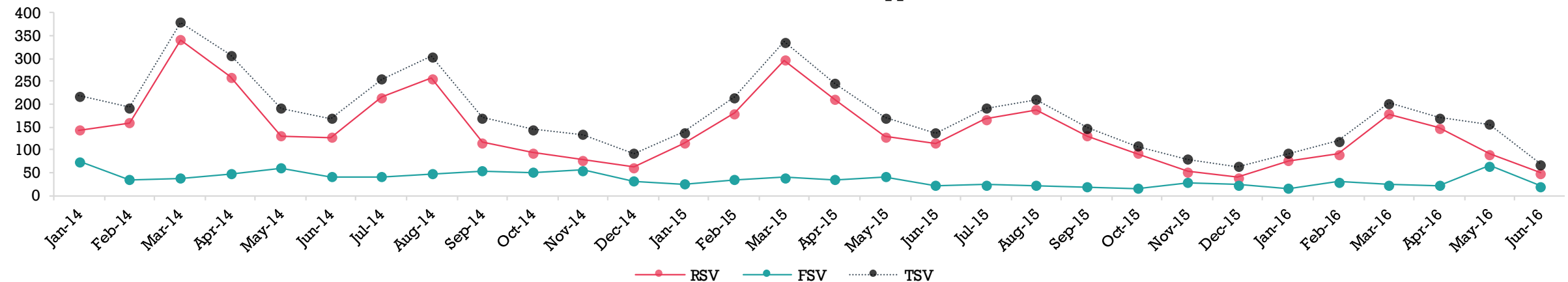
# Saudi Arabia:



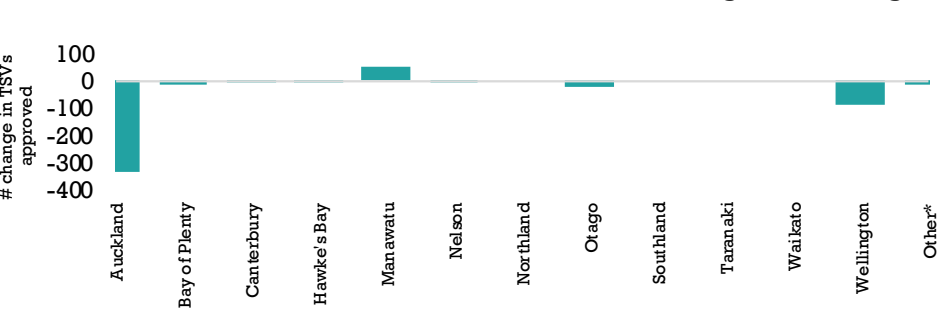
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
-66 ↓ -57%	-2 ↓ -9%	-68 ↓ -50%	-412 ↓ -39%	-20 ↓ -10%	-432 ↓ -35%

YTD (June)

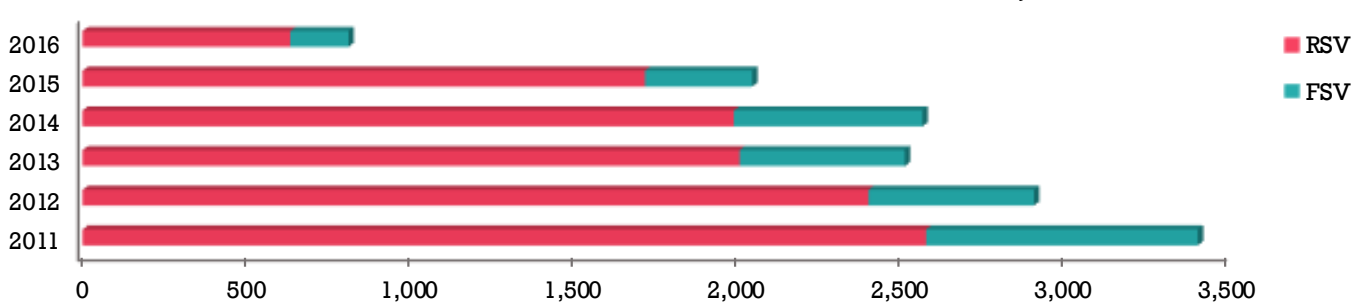
Saudi Arabia: student visas approved 2014-2016



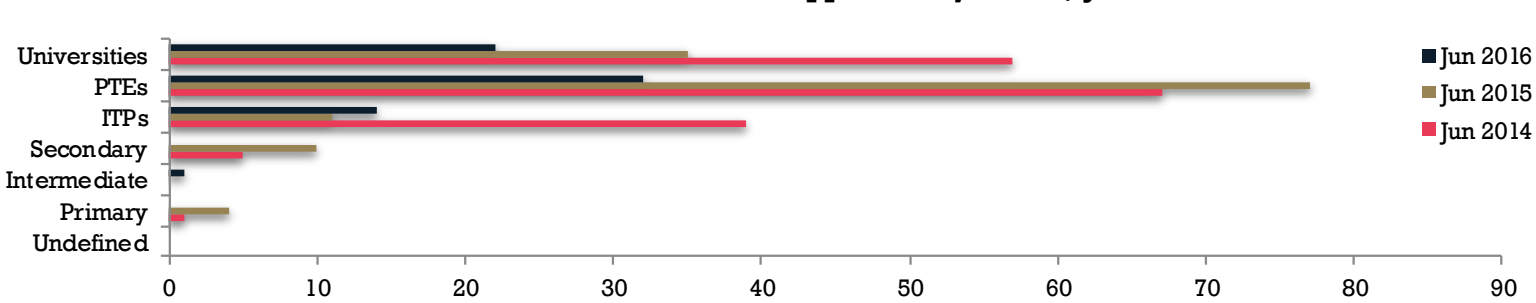
Saudi Arabia: 2016 YTD TSV regional change



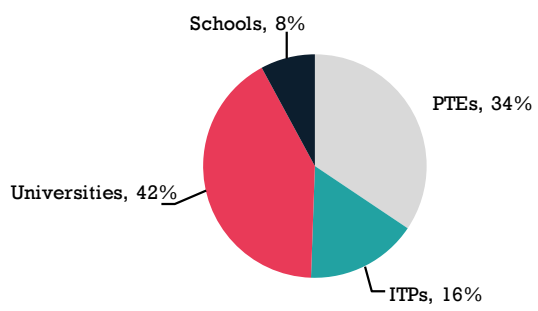
Saudi Arabia: Cumulative total for RSV vs. FSV, 2011-2016



Saudi Arabia: Total student visas approved by sector, June



Saudi Arabia: 2016 YTD Sector breakdown of TSV



## Key takeaways:

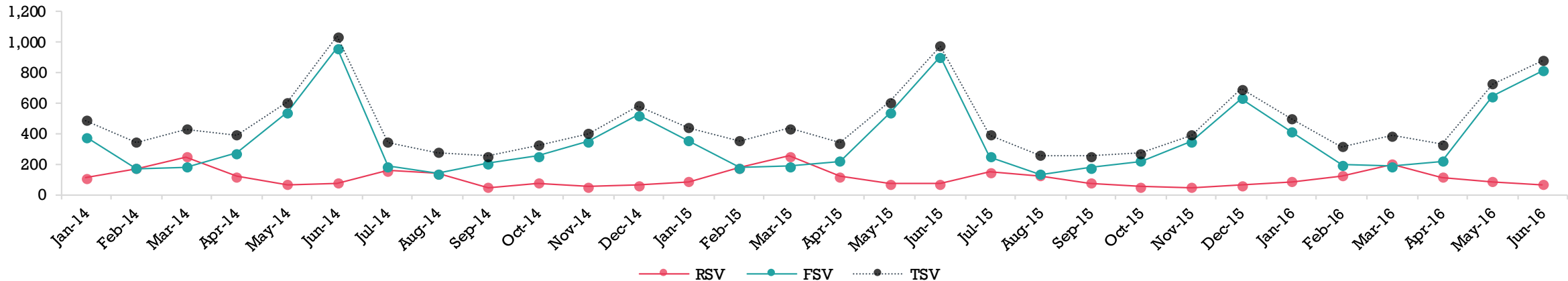
- Saudi Arabia continues to see negative results, with TSV down YTD (-35%, -432). This is being driven by both a decline in FSV and RSV and is due to reductions in the Saudi scholarship programme in recent years.
- For June in particular, there was a 50% decrease in TSV compared to the same month last year (-68) which was driven by a decrease in RSV (-57%,-66).

# Europe Total: 🍊

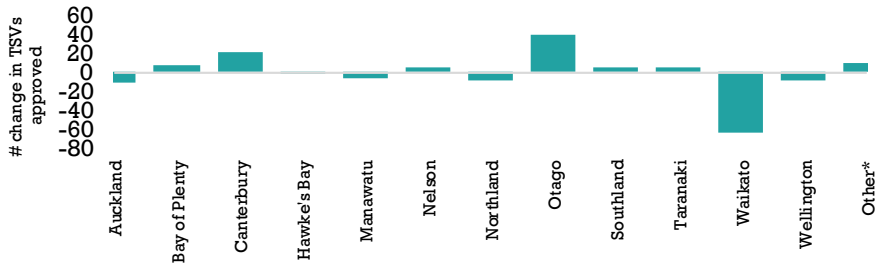
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
-5 ⬇️ -7%	-92 ⬇️ -10%	-97 ⬇️ -10%	-98 ⬇️ -13%	87 ➡️ 4%	-11 ➡️ 0%

YTD (June)

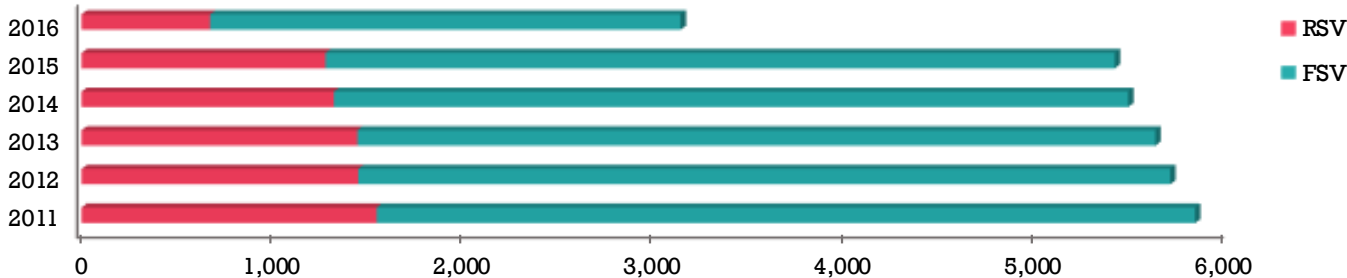
Europe Total: student visas approved 2014-2016



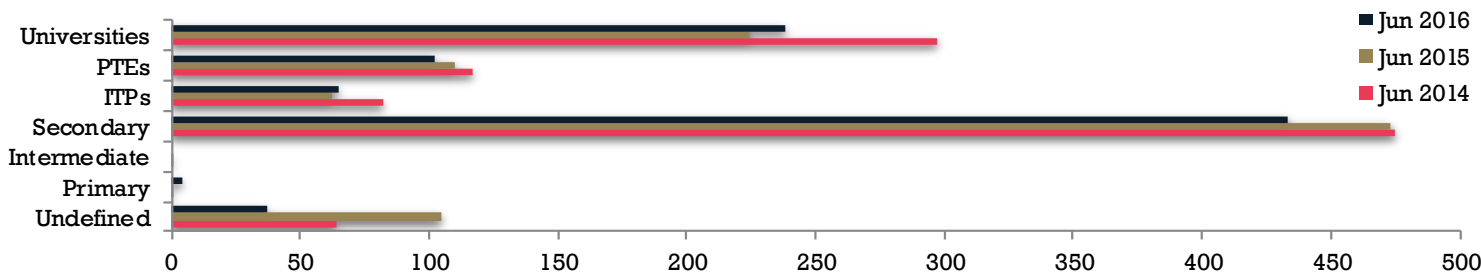
Europe Total: 2016 YTD TSV regional change



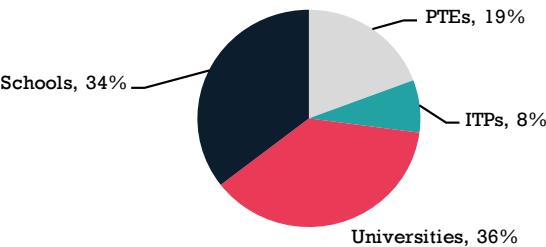
Europe Total: Cumulative total for RSV vs. FSV, 2011-2016



Europe Total: Total student visas approved by sector, June



Europe Total: 2016 YTD Sector breakdown of TSV



## Key takeaways:

- Europe continues to experience growth in FSV, up 4% YTD (+87). However, this is being offset by a decline in RSV, down 13% (-98) compared to the same period last year.
- TSV for June 2016 was in decline (-10%; -97) compared to June 2015. The decline was driven by FSV, also down 10% (-92).
- The university, PTE and school sectors attract the majority of European students (92%).

Europe 5 is made up of Germany, France, Sweden, UK and Norway.

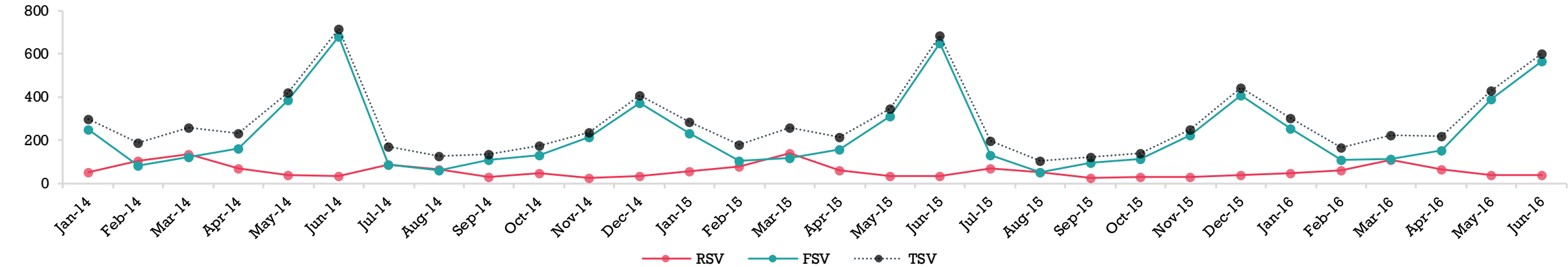
# Europe 5:



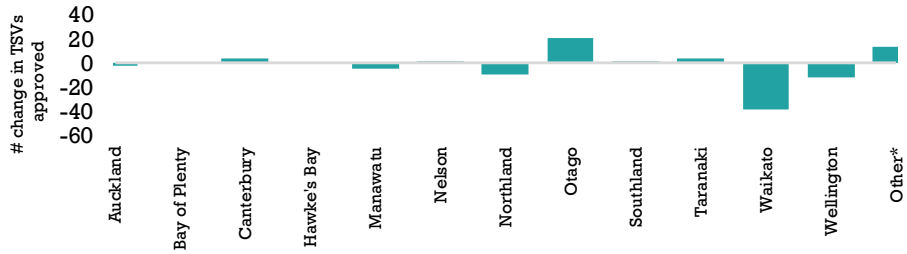
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
1 ↗ 3%	-83 ↘ -13%	-82 ↘ -12%	-42 ↘ -11%	15 ↗ 1%	-27 ↗ -1%

YTD (June)

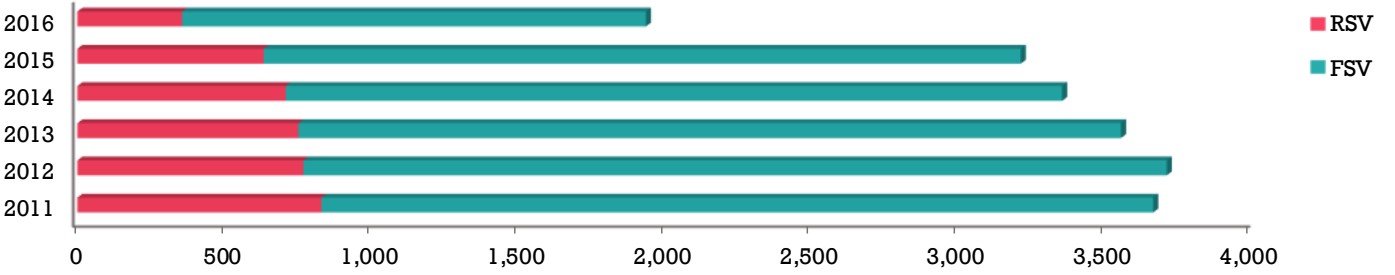
Europe 5: student visas approved 2014-2016



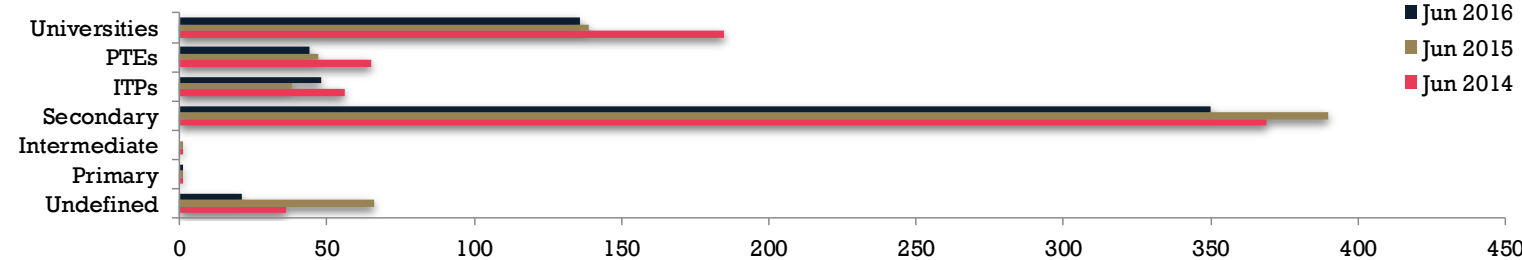
Europe 5: 2016 YTD TSV regional change



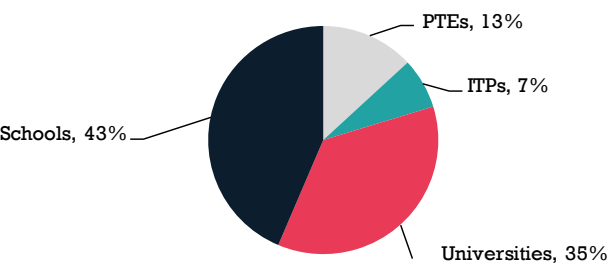
Europe 5: Cumulative total for RSV vs. FSV, 2011-2016



Europe 5: Total student visas approved by sector, June



Europe 5: 2016 YTD Sector breakdown of TSV



Key takeaways:

- Europe 5 remains flat YTD, compared to the same period in 2015 (-1%,-27) driven mainly by a decline in those returning to New Zealand to study (-11%,-42).
- The majority of students from Europe 5 countries come to New Zealand to study at schools (43%) or universities (35%).



June RSV

1 ↑ 5%

June FSV

-53 ↓ -17%

June TSV

-52 ↓ -16%

YTD RSV

19 ↑ 10%

YTD FSV

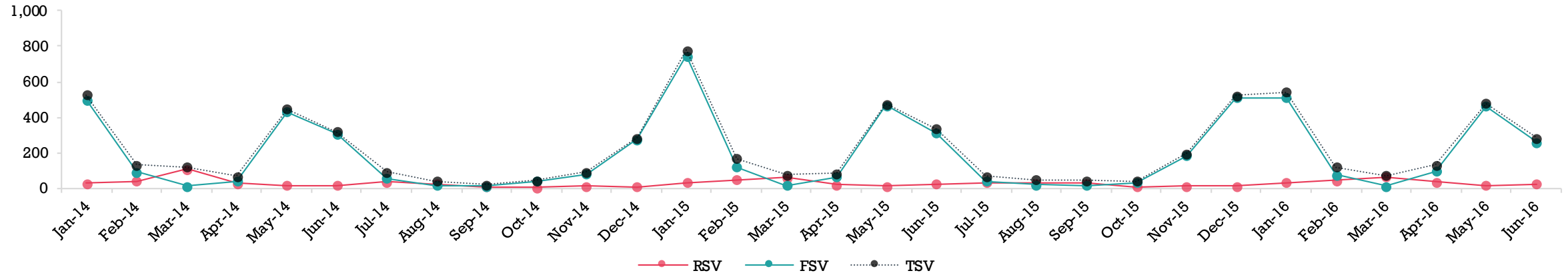
-308 ↓ -18%

YTD TSV

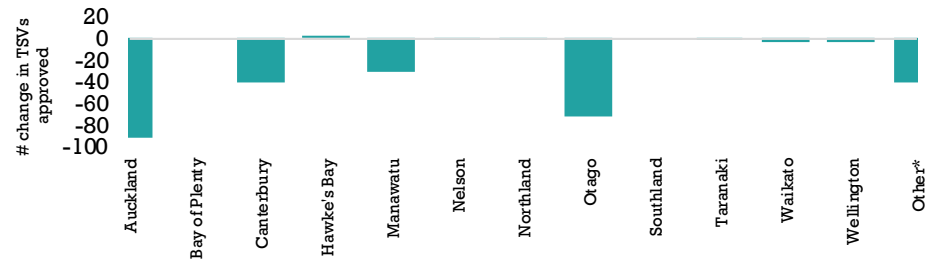
-289 ↓ -15%

YTD (June)

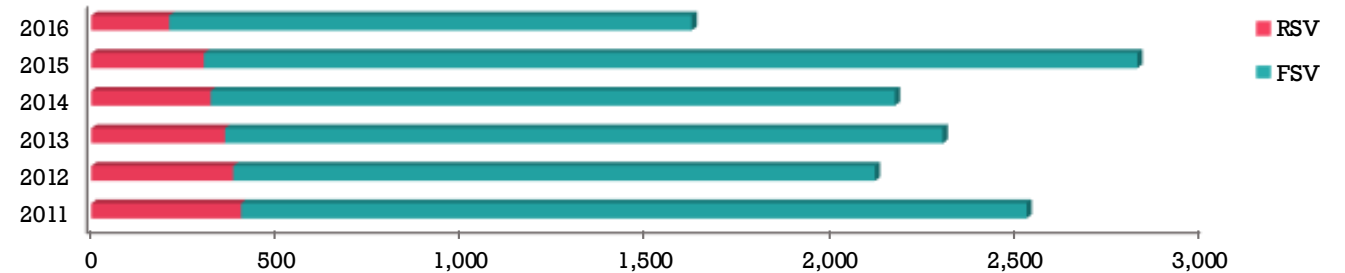
USA: student visas approved 2014-2016



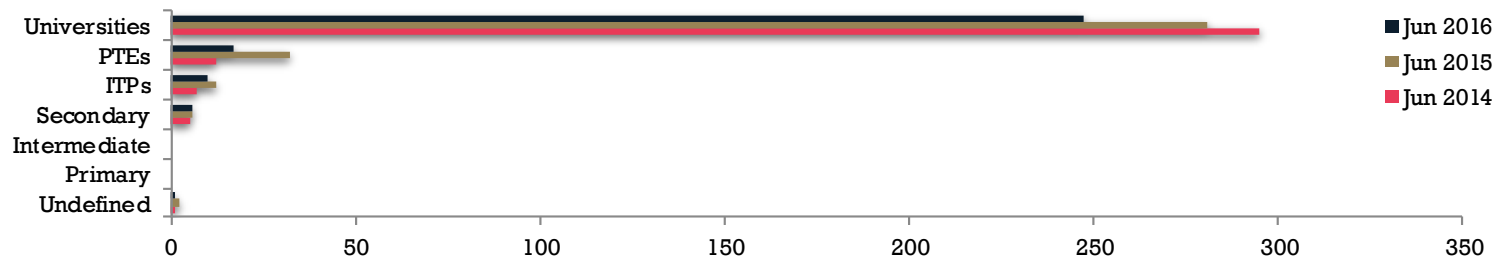
USA: 2016 YTD TSV regional change



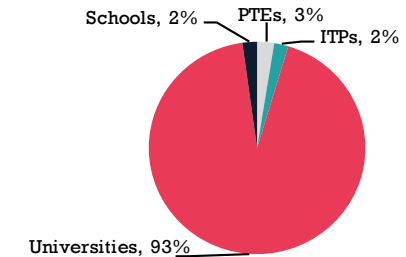
USA: Cumulative total for RSV vs. FSV, 2011-2016



USA: Total student visas approved by sector, June



USA: 2016 YTD Sector breakdown of TSV



## Key takeaways:

- While USA TSV appear to be much lower than normal YTD (-15%, -289), 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.
- After a strong April and May, TSV results in June were down 16% (-52) which was driven by the decline in FSV -17% (-53) compared to June 2015.
- The university sector makes up the majority of TSV approved for USA (93%).

# Japan:

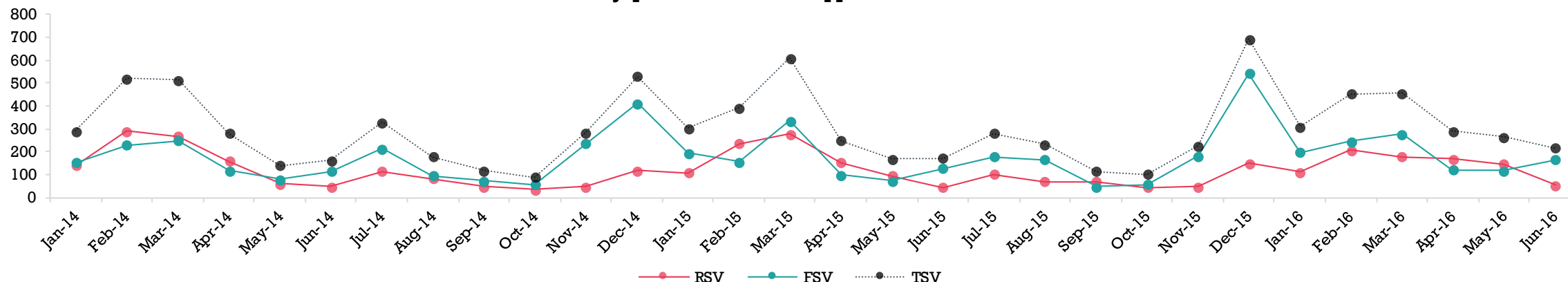


June RSV	June FSV	June TSV
9 <span style="color: green;">↑</span> 20%	37 <span style="color: green;">↑</span> 29%	46 <span style="color: green;">↑</span> 27%

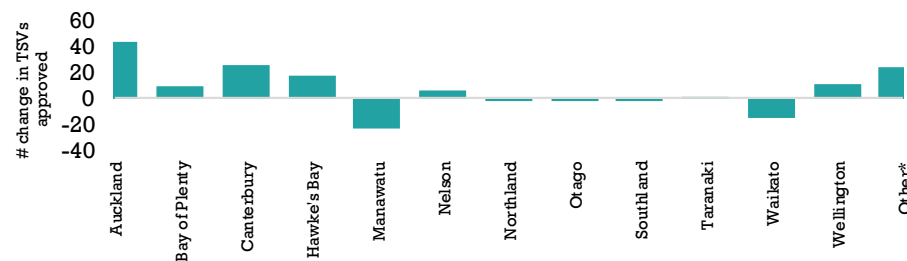
YTD RSV	YTD FSV	YTD TSV
-46 <span style="color: red;">↓</span> -5%	138 <span style="color: green;">↑</span> 14%	92 <span style="color: green;">↑</span> 5%

YTD (June)

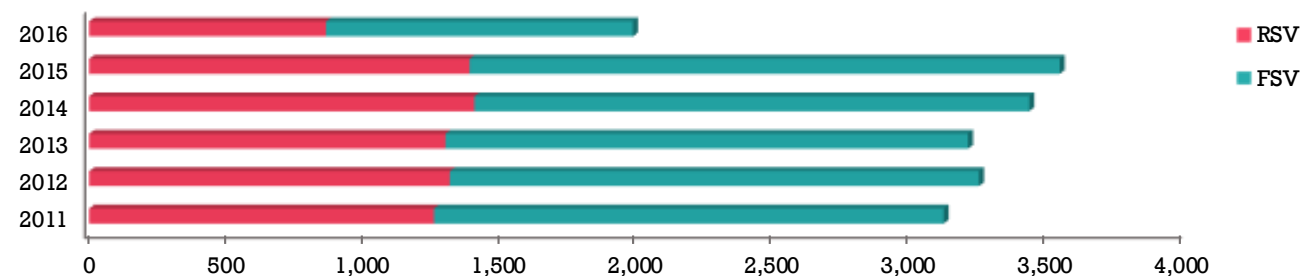
Japan: student visas approved 2014-2016



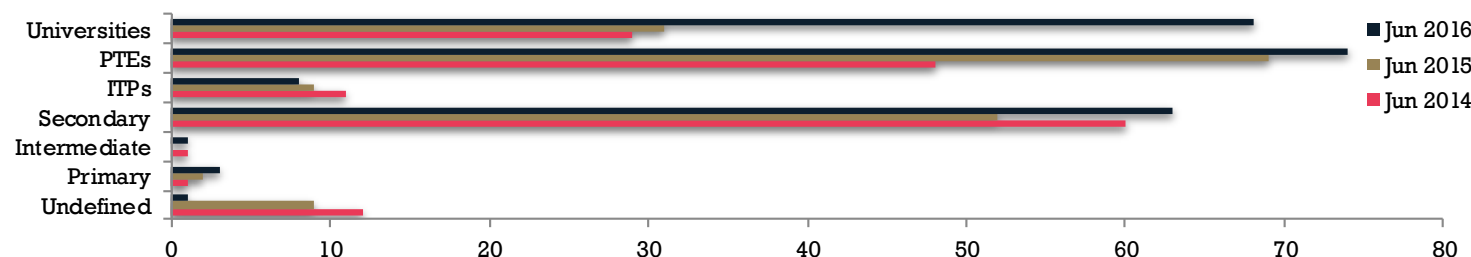
Japan: 2016 YTD TSV regional change



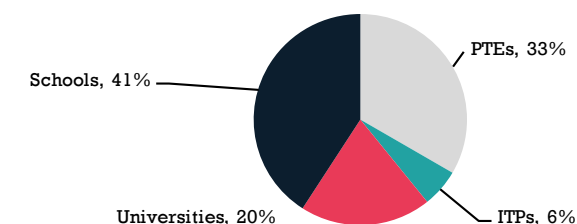
Japan: Cumulative total for RSV vs. FSV, 2011-2016



Japan: Total student visas approved by sector, June



Japan: 2016 YTD Sector breakdown of TSV



## Key takeaways:

- Japan has seen an increase in FSV approved YTD (+14%, +138), however, the number of students choosing to remain/return to New Zealand to study has declined compared to 2015 YTD (-5%, -46). June saw strong results, with an additional 46 visas approved. This was driven by an increase in university and schools sectors.
- The schools and PTE sectors draw 74% of Japanese students to New Zealand.

# Korea:



June RSV

-7 ↓ -5%

June FSV

-26 ↓ -13%

June TSV

-33 ↓ -10%

YTD RSV

-147 ↓ -8%

YTD FSV

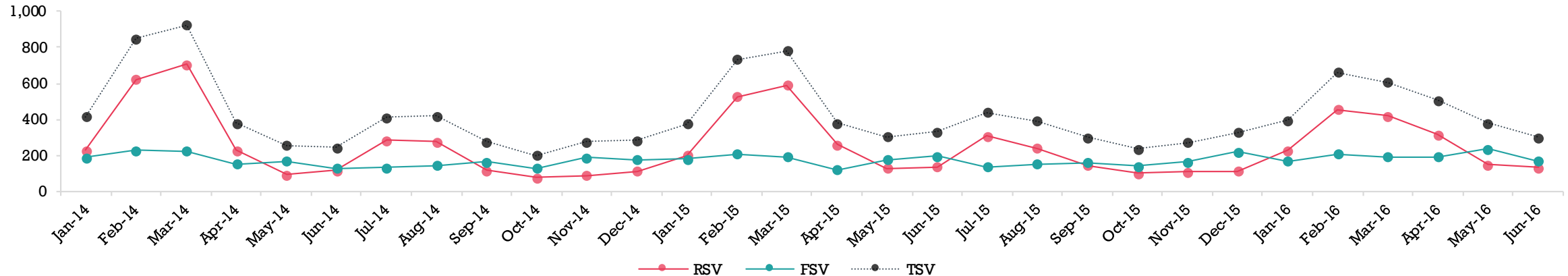
88 ↑ 8%

YTD TSV

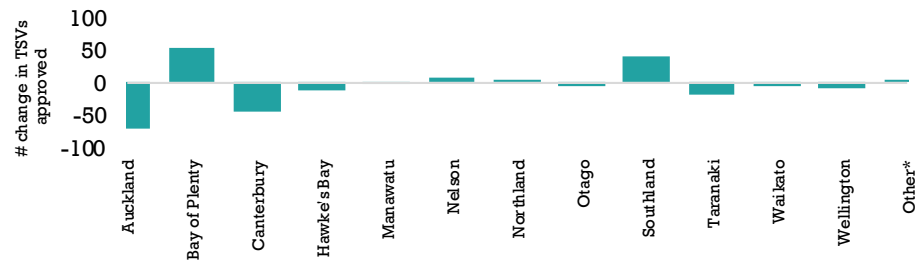
-59 → -2%

YTD (June)

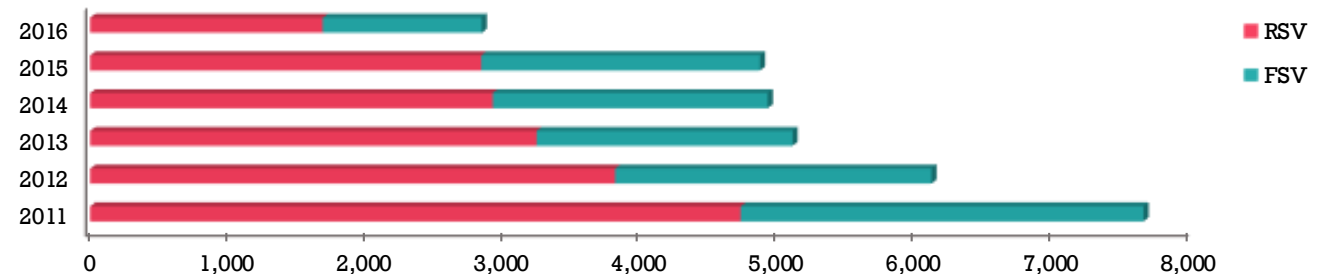
Korea: student visas approved 2014-2016



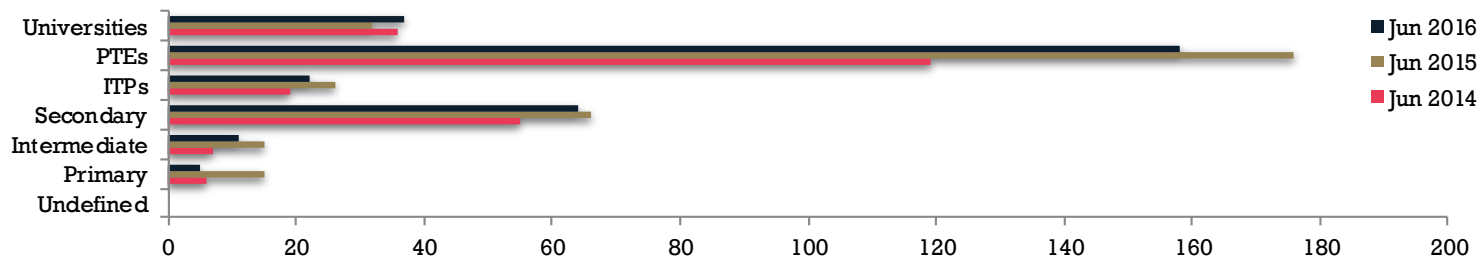
Korea: 2016 YTD TSV regional change



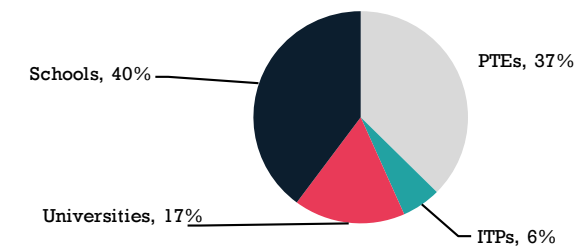
Korea: Cumulative total for RSV vs. FSV, 2011-2016



Korea: Total student visas approved by sector, June



Korea: 2016 YTD Sector breakdown of TSV



## Key takeaways:

- 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.
- While TSVs approved for Korea has stabilised YTD (-2%, -59), June 2016 was in decline compared to June 2015. June TSV were down (-33) driven by FSV (-26) and RSV (-7). The decline was felt in all sectors except for the universities.



# Trends by sector

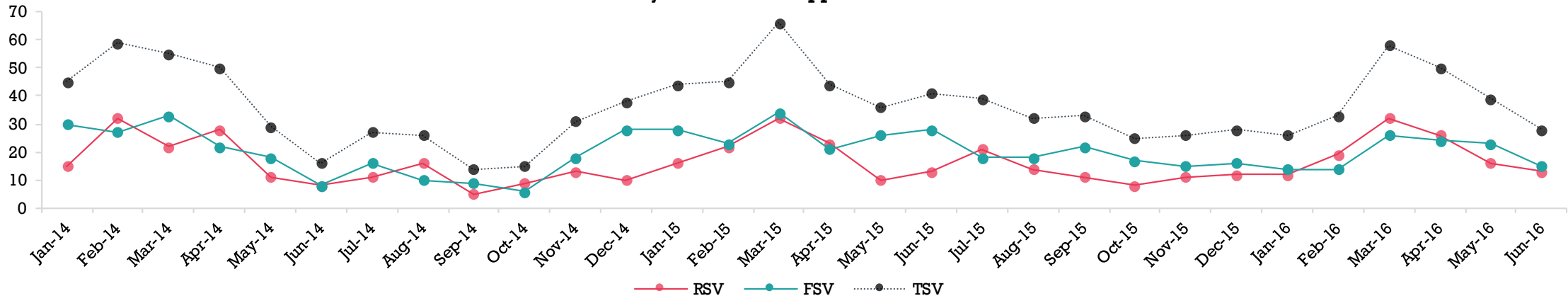
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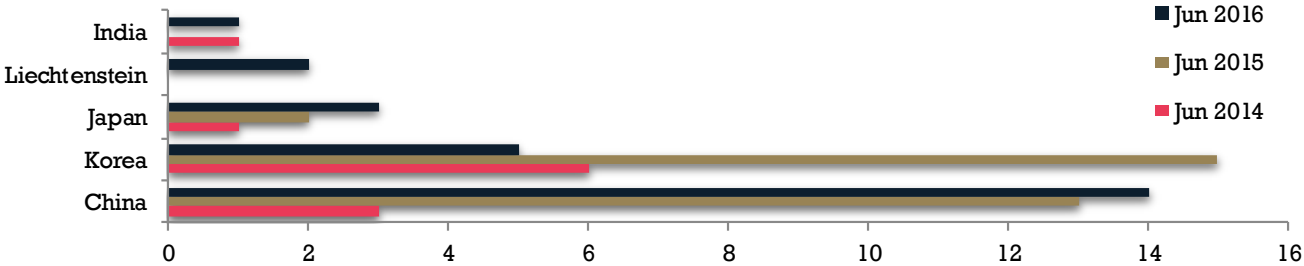
# Primary schools:

YTD (June)

Primary: student visas approved 2014-2016

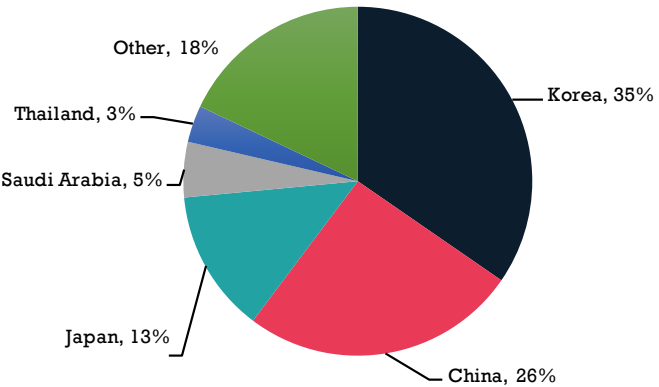


Primary: Total student visas approved by sector, June



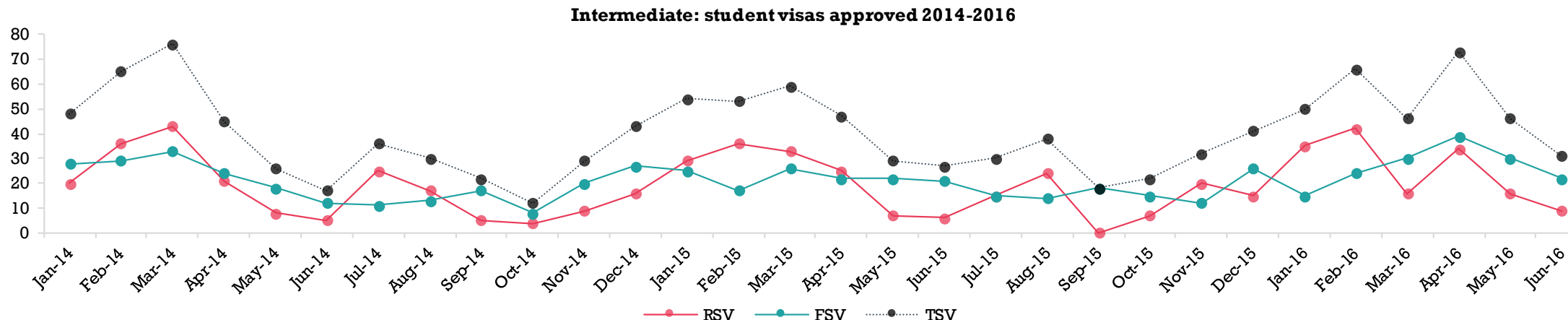
June RSV		June FSV		June TSV	
0	➡ 0%	-13	⬇ -46%	-13	⬇ -32%
YTD RSV		YTD FSV		YTD TSV	
2	➡ 2%	-44	⬇ -28%	-42	⬇ -15%

Primary: YTD 2016 Sector breakdown of TSV

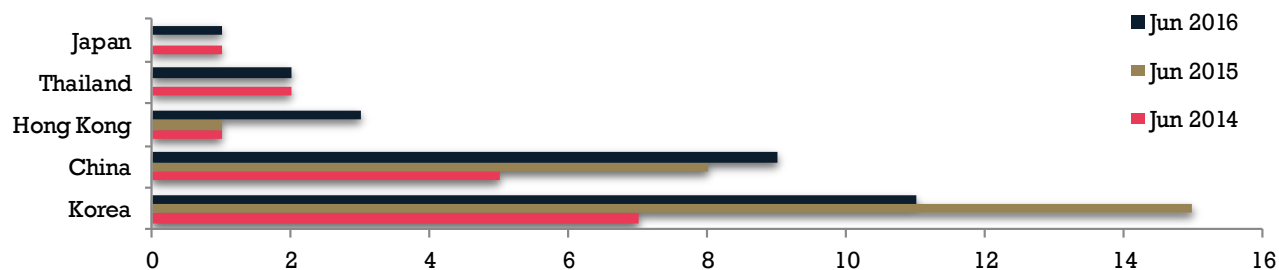


## Key takeaways:

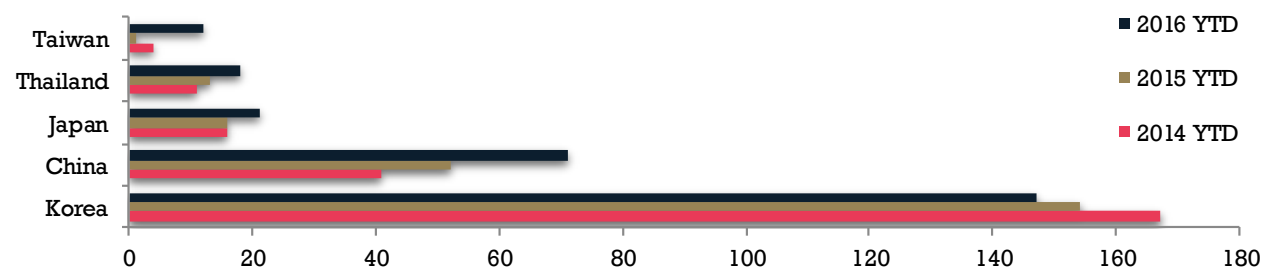
- TSV continued to decline in June 2016 (-32%), which contributed to the overall decline in TSV YTD (-15%) in the primary school sector. The decline is being driven by FSV (-28%) YTD.
- Korea, China and Japan make up 74% of all visas approved this YTD in primary schools.



**Intermediate: Total student visas approved by sector, June**

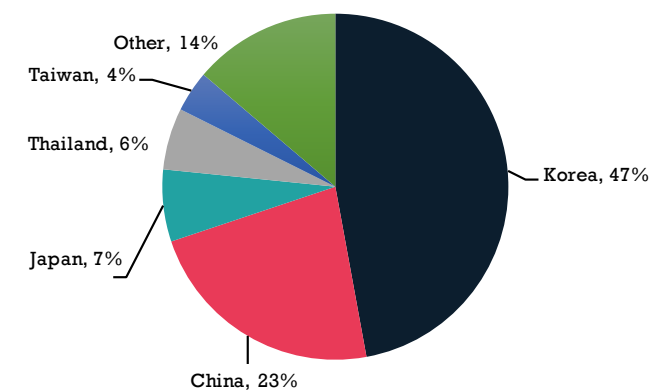


**Intermediate: Total student visas approved by sector, YTD**



June RSV			June FSV			June TSV		
3	↑	50%	1	↑	5%	4	↑	15%
YTD RSV			YTD FSV			YTD TSV		
16	↑	12%	27	↑	20%	43	↑	16%

**Intermediate: YTD 2016 Sector breakdown of TSV**

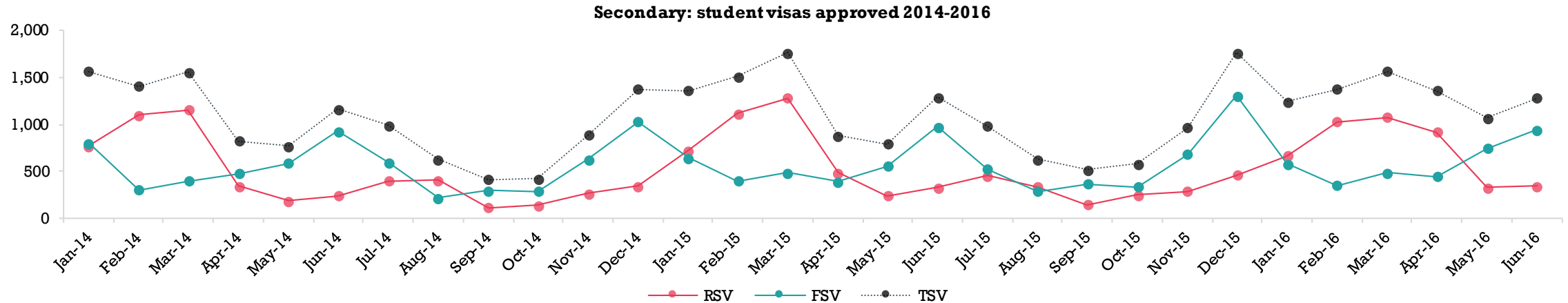


## Key takeaways:

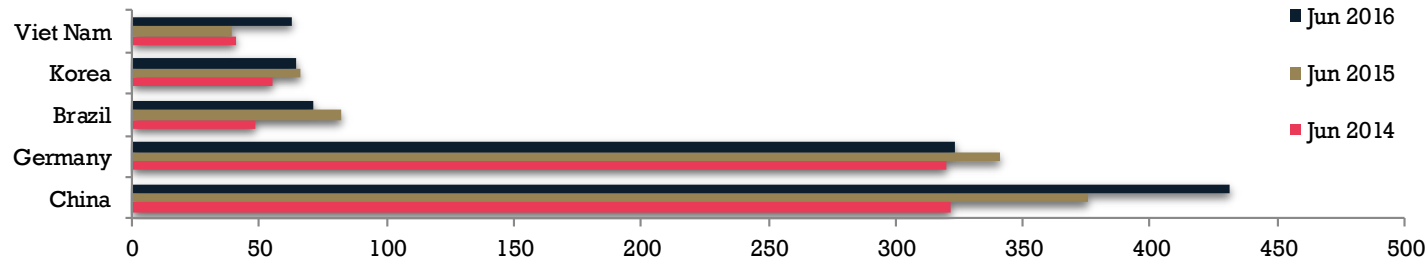
- The intermediate school sector is experiencing growth in TSV YTD (+16%, +43). There was a 15% increase in TSV approved in June 2016 compared to June 2015. This includes growth from China, Hong Kong, Thailand and Japan.
- Auckland and Bay of Plenty regions have experienced increases in Intermediate students this year.

# Secondary schools:

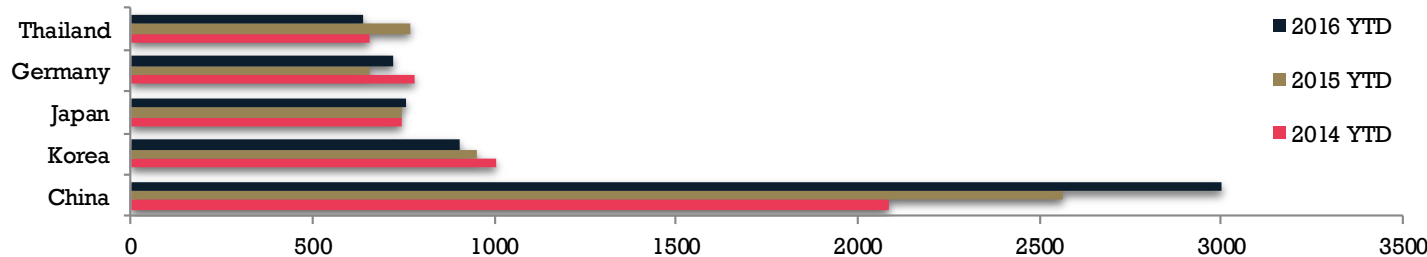
YTD (June)



**Secondary: Total student visas approved by sector, June**

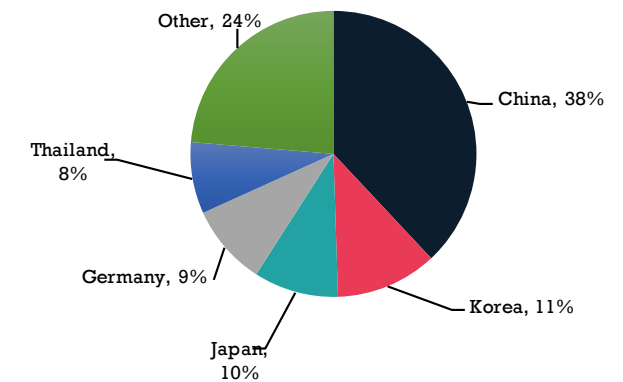


**Secondary: Total student visas approved by sector, YTD**



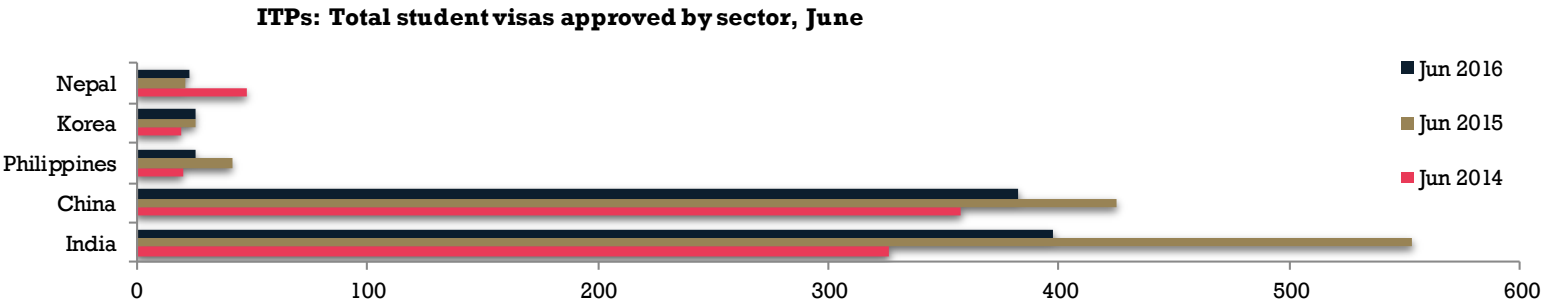
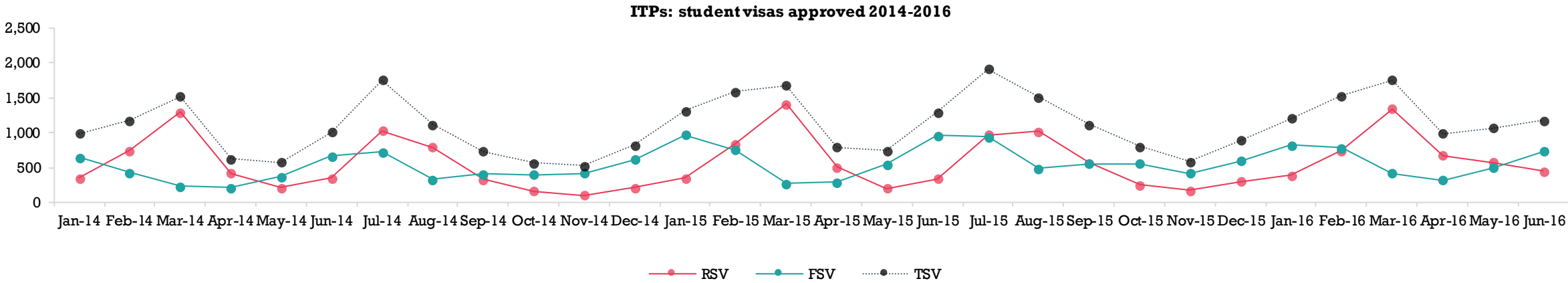
June RSV	June FSV	June TSV
19 ↑ 6%	-29 ➡ -3%	-10 ➡ -1%
YTD RSV	YTD FSV	YTD TSV
185 ➡ 4%	117 ➡ 3%	302 ➡ 4%







**Secondary: YTD 2016 Sector breakdown of TSV**



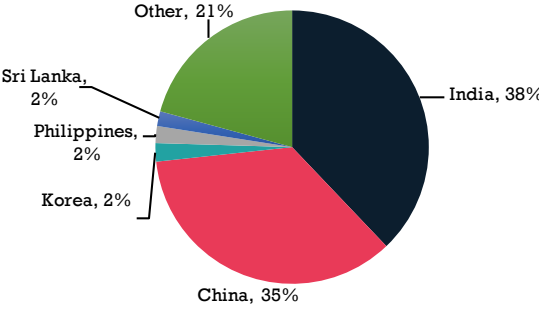
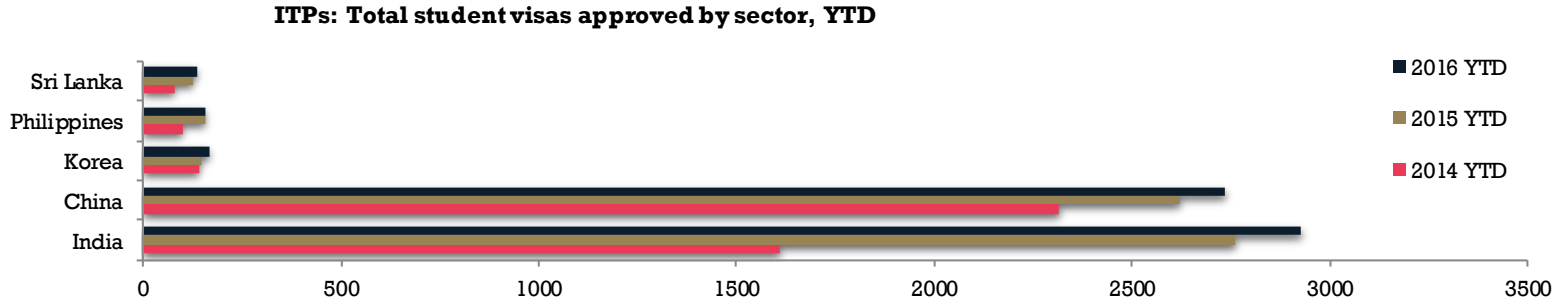
## Key takeaways:

- The secondary schools market YTD results are flat, with TSV up 4% (+302) and FSV up 3% (+117), compared to 2015 YTD.
- Top markets contributing to the increase in TSV in June include China and Viet Nam.
- The majority (59%) of secondary school students are from: China, Korea and Japan.



June RSV	June FSV	June TSV
105  31%	-223  -23%	-118  -9%
YTD RSV	YTD FSV	YTD TSV
512  14%	-200  -5%	312  4%

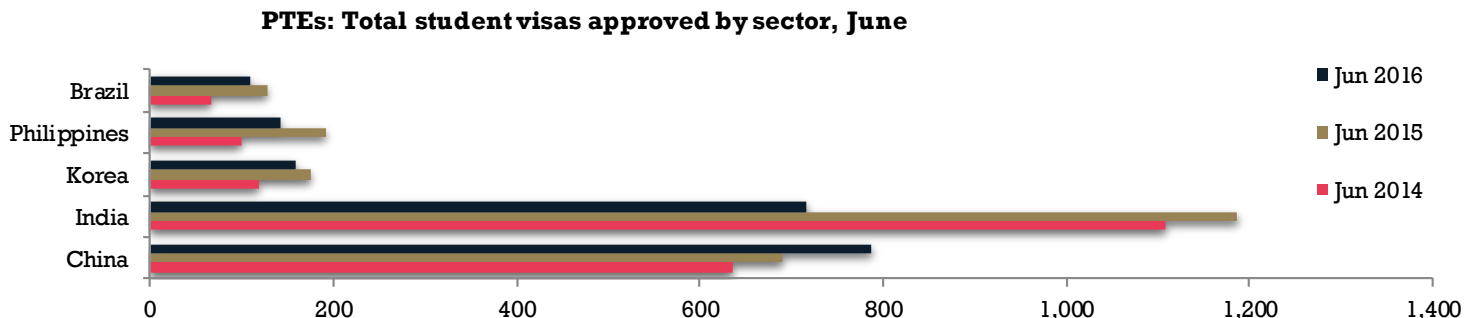
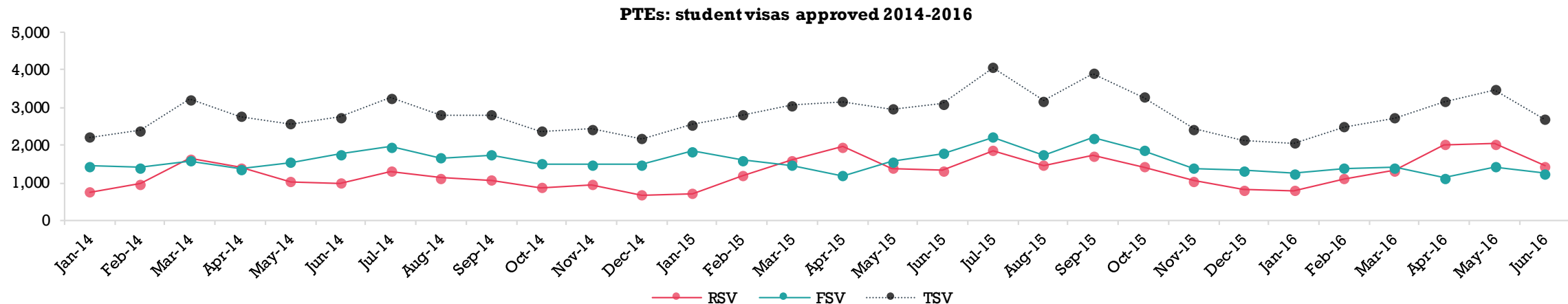
**ITPs: YTD 2016 Sector breakdown of TSV**



- Key takeaways:**
- YTD results for the ITP sector are flat, up 4% (+312). The number of FSV approved fell 5% (-200) compared to 2015 YTD. RSV have seen strong growth, up 14% YTD (+512) indicating that students are renewing/choosing to continuing their studies in New Zealand.
  - The majority of students in the ITP sector are Indian and Chinese (73% YTD).
  - Despite the overall declines in TSV in June, several New Zealand regions saw good growth compared to June 2015 in particular: Wellington (+147), Otago (+103) and Bay of Plenty (+78).

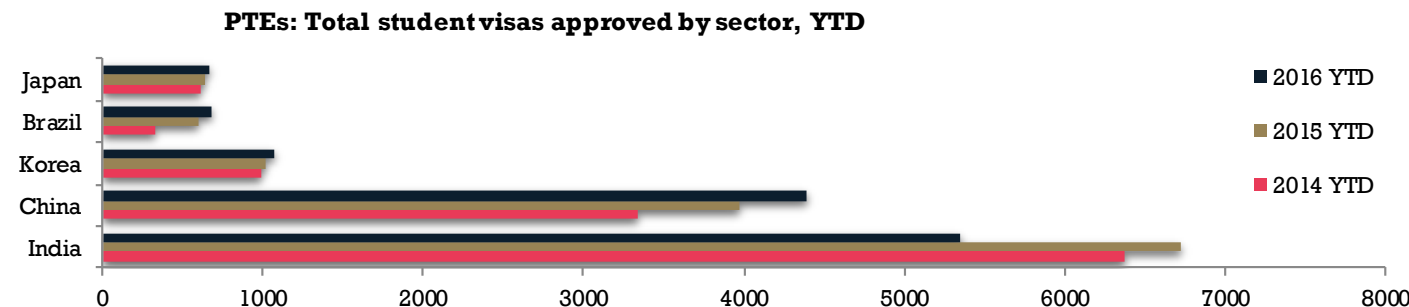
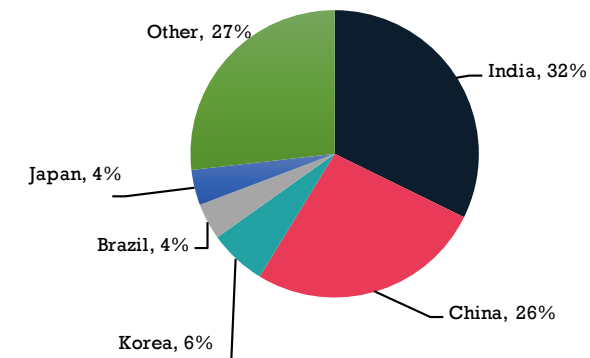
# Private Training Establishments (PTEs):

YTD (June)



June RSV	June FSV	June TSV
129 <span>↑ 10%</span>	-537 <span>↓ -30%</span>	-408 <span>↓ -13%</span>
YTD RSV	YTD FSV	YTD TSV
573 <span>↑ 7%</span>	-1,609 <span>↓ -17%</span>	-1,036 <span>↓ -6%</span>

**PTEs: YTD 2016 Sector breakdown of TSV**

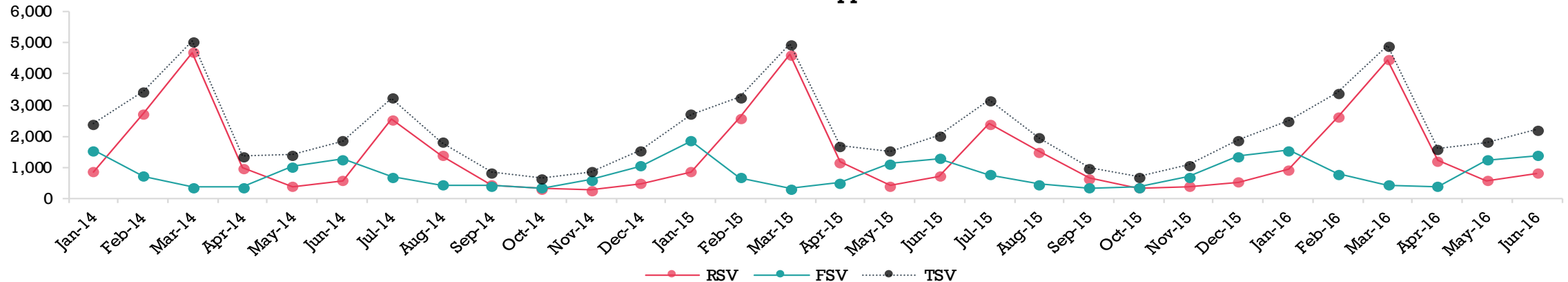


**Key takeaways:**

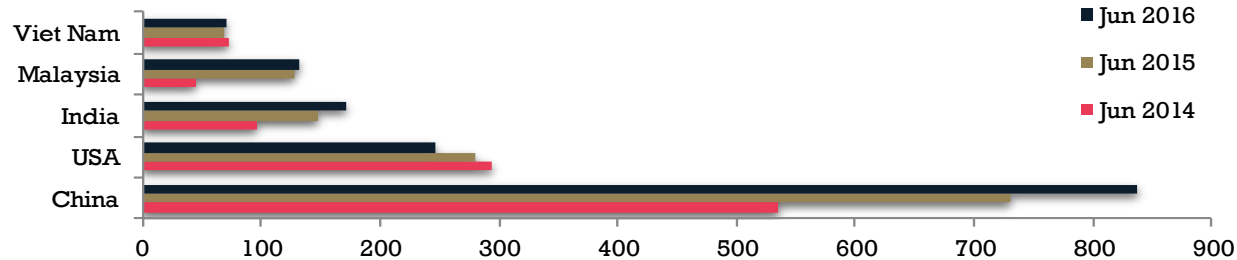
- The decline in TSV approved for the PTE sector continues YTD (-6% , -1,036) which is being driven by a reduction in student visas approved for first time students.
- The strong decrease in FSV for this sector (-1,609 YTD) is being driven by the decline in FSV approved for students from India and the Philippines following changes to the English language requirements (Rule 18) in 2015. Growth in TSV YTD have been from: China (+11%), Korea (+5%), Brazil (+15%) and Japan (+4%).



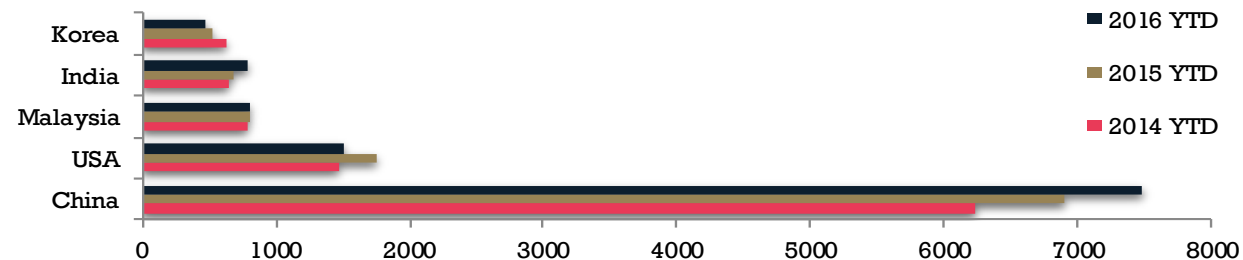
Universities: student visas approved 2014-2016



Universities: Total student visas approved by sector, June

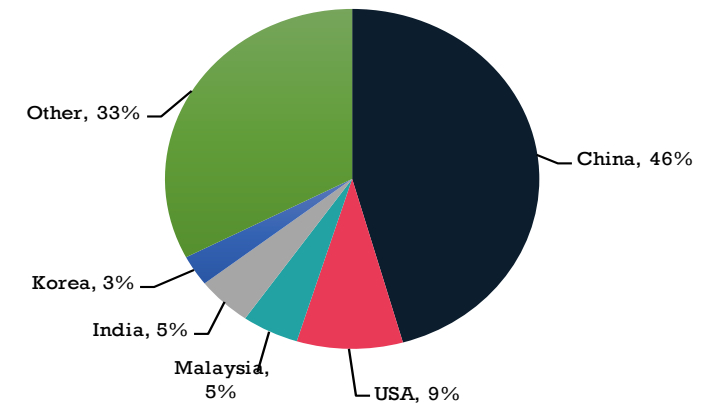


Universities: Total student visas approved by sector, YTD



June RSV			June FSV			June TSV		
96	↑	13%	105	↑	8%	201	↑	10%
YTD RSV			YTD FSV			YTD TSV		
246	→	2%	37	→	1%	283	→	2%

Universities: YTD 2016 Sector breakdown of TSV



## Key takeaways:

- YTD results for the university sector remain stable (+2%, +283). The sector saw growth in June 2016 (+10%, +201) being driven by both FSV (+8%) and RSV (+13%), compared to June 2015.
- China makes up just under half of all TSV approved YTD (46%) for the university sector.



## Trends by region

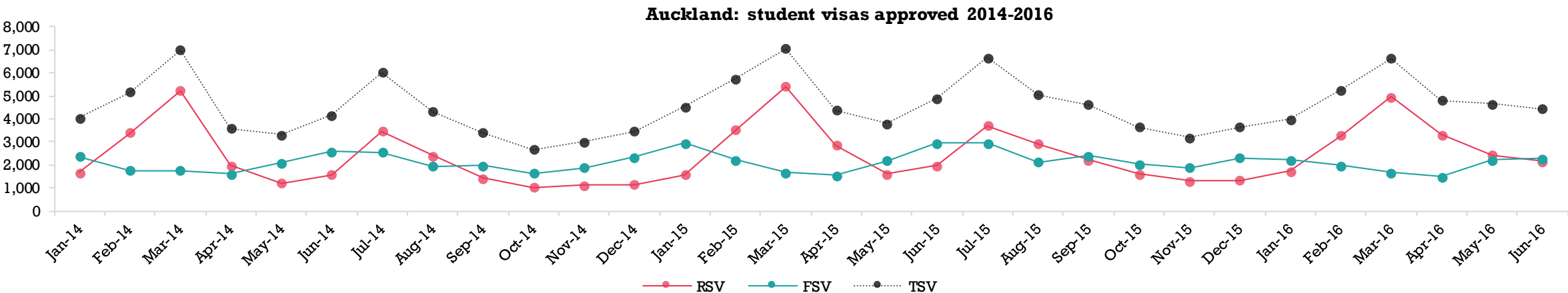
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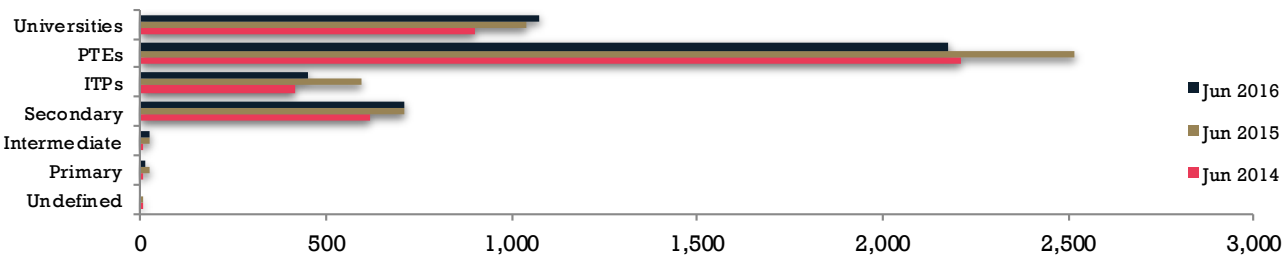




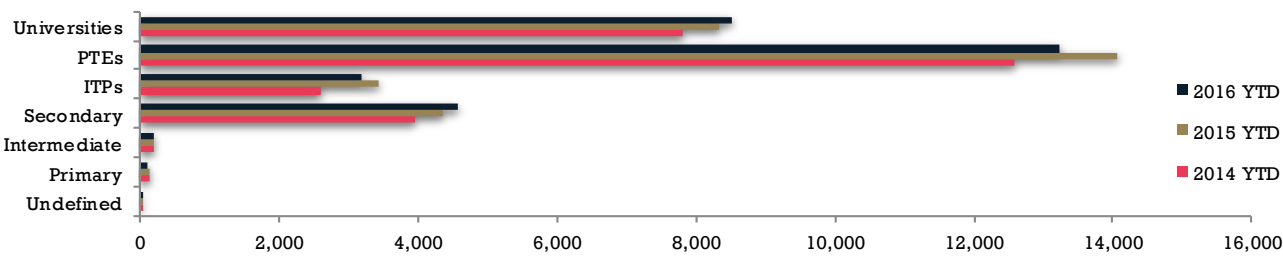
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
196  10%	-659  -22%	-463  -9%	985  6%	-1,659  -12%	-674  -2%



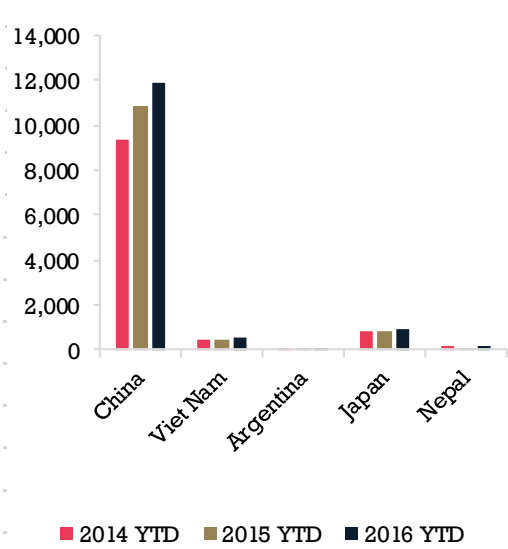
Auckland: Total student visas approved by sector, June



Auckland: Total student visas approved by sector, YTD



Auckland: YTD top five market shifts (TSVs)



Top FSV shifts

June FSV	Change	% change
Colombia	19	40%
Indonesia	16	94%
Argentina	10	167%
USA	-30	-22%
Philippines	-66	-42%
India	-512	-59%

FSVs YTD	Change	% change
China	145	5%
Argentina	60	200%
Korea	60	8%
USA	-96	-18%
Philippines	-325	-45%
India	-1670	-38%

Key takeaways:

- The Auckland region remains stable YTD for TSV, down 2% (-674).
- Despite a decrease in FSV YTD (being driven by a drop in approvals for Indian and Filipino students (-1,995) as a result of the change in English language requirements (Rule 18) in 2015); the region has been able to stabilise due to a 6% increase in RSV YTD (+985).
- Growth in FSV YTD was from China (+145), Argentina (+60) and Korea (+60).

# Bay of Plenty:

June RSV	June FSV	June TSV
13	-25	-12

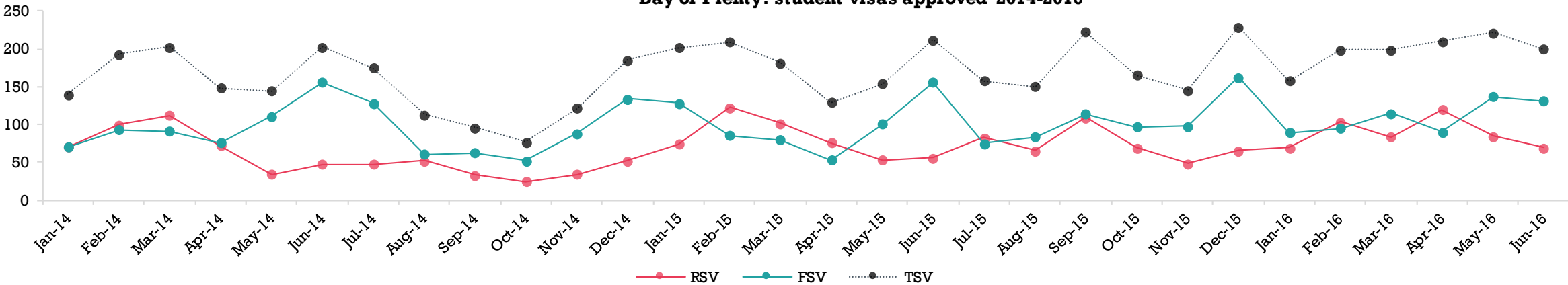
23% ↑ -16% ↓ -6% ↓

YTD RSV	YTD FSV	YTD TSV
47	53	100

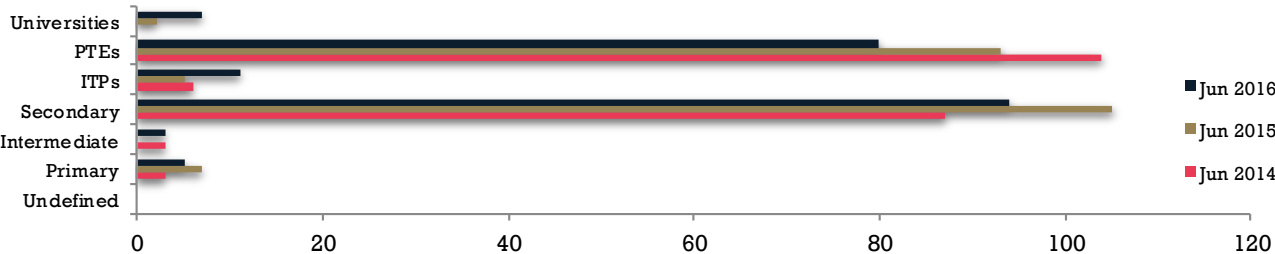
10% ↑ 9% ↑ 9% ↑

YTD (June)

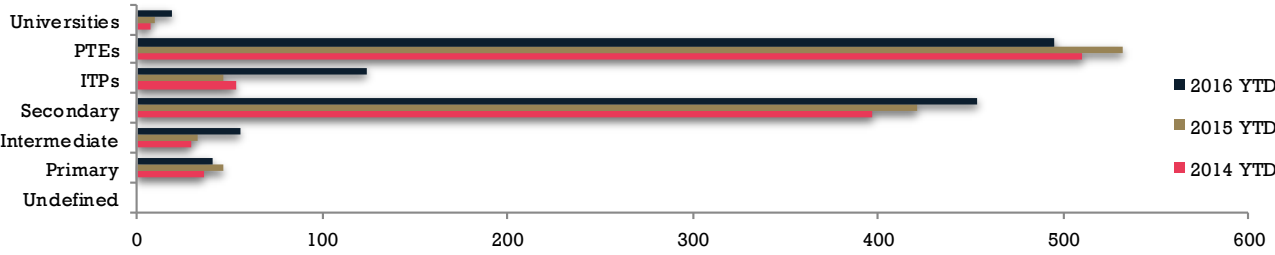
Bay of Plenty: student visas approved 2014-2016



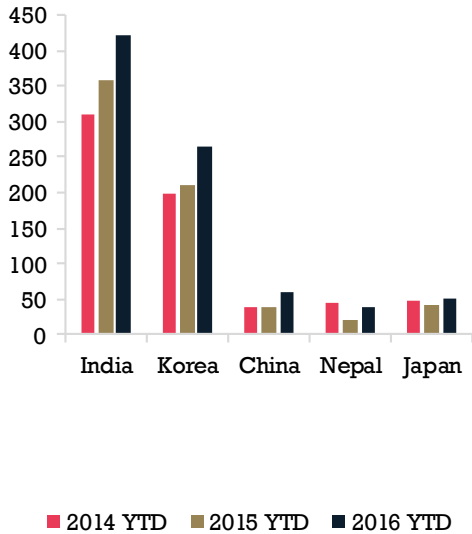
Bay of Plenty: Total student visas approved by sector, June



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



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



Top FSV shifts

June FSV	Change	% change
Korea	6	55%
China	5	250%
Brazil	3	30%
India	-6	-32%
Philippines	-9	-64%
Germany	-11	-21%

FSVs YTD	Change	% change
Korea	50	59%
India	24	14%
Japan	21	162%
Bangladesh	-11	-92%
Philippines	-16	-39%
Brazil	-28	-54%

## Key takeaways:

- TSV approved for Bay of Plenty are up YTD (+9%, +100) a strong April and May has driven YTD results up for both FSV up 9% (+53) and RSV up 10% (+47).
- June 2016 results were down however, driven by the decline in FSV approved (-16%), compared to June 2015.
- Growth in FSV YTD have been from Korea (+50), India (+24) and Japan (+21).

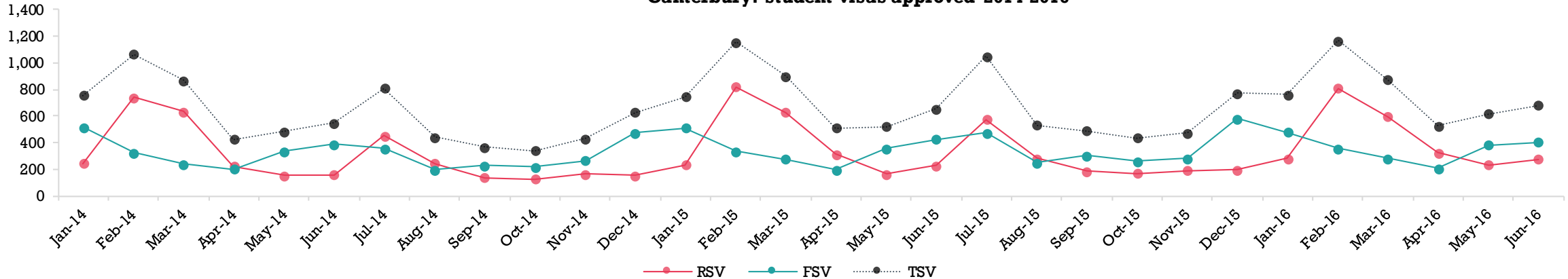


June RSV	June FSV	June TSV
44  19%	-19  -4%	25  4%

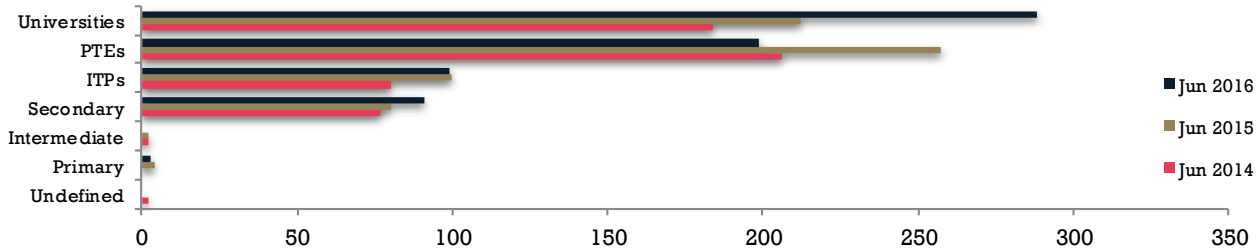
YTD RSV	YTD FSV	YTD TSV
129  5%	13  1%	142  3%

YTD (June)

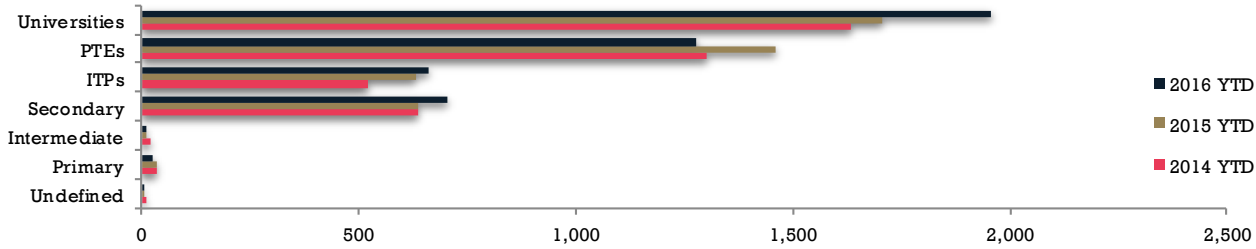
Canterbury: student visas approved 2014-2016



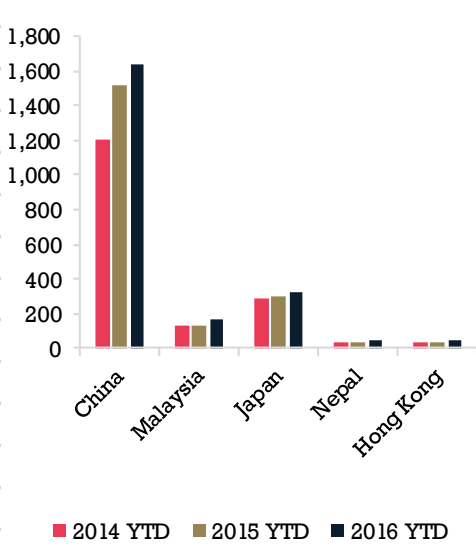
Canterbury: Total student visas approved by sector, June



Canterbury: Total student visas approved by sector, YTD



Canterbury: YTD top five market shifts (TSVs)



Top FSV shifts

June FSV	Change	%change
China	30	38%
Malaysia	20	111%
Japan	6	46%
Norway	-7	-64%
Philippines	-8	-40%
India	-70	-56%

FSVs YTD

FSVs YTD	Change	%change
Malaysia	38	73%
China	23	6%
Nepal	17	121%
Korea	-25	-36%
India	-39	-8%
USA	-48	-19%

Key takeaways:

- Canterbury results remain stable YTD, compared to 2015 YTD. The June 2016 result was flat with TSV at 4% (+25) and FSV down -4% (-19) compared to June 2015.
- The university sector in Canterbury continues to be the largest sector (42%) and experienced a 15% increase in TSV approved YTD (+250). Secondary schools and ITPs in the Canterbury region have also seen an increase in TSV YTD (+10% and +5% respectively).



June RSV

-6 ↓ -20%

June FSV

-20 ↓ -26%

June TSV

-26 ↓ -25%

YTD RSV

14 ↑ 7%

YTD FSV

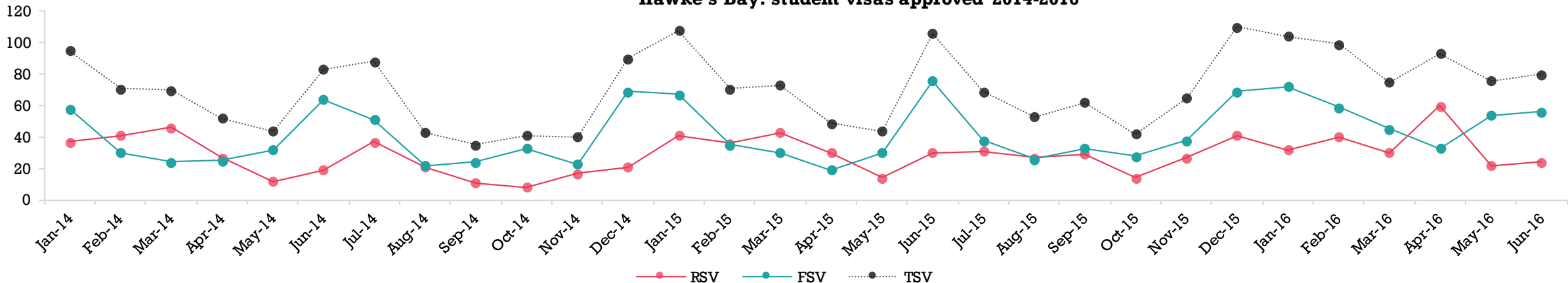
62 ↑ 24%

YTD TSV

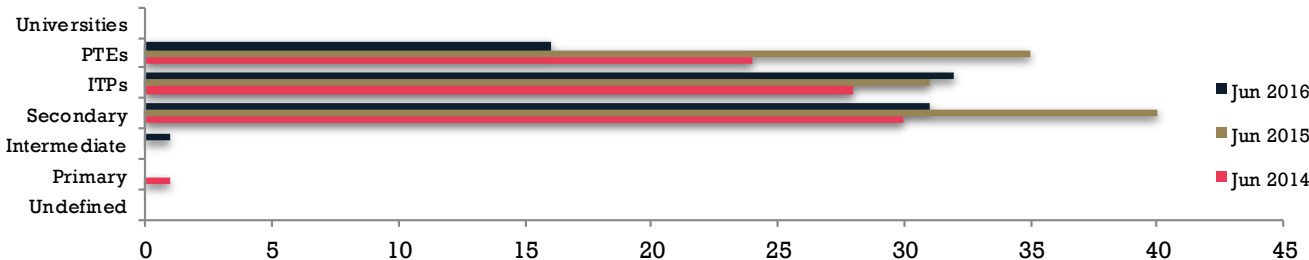
76 ↑ 17%

YTD (June)

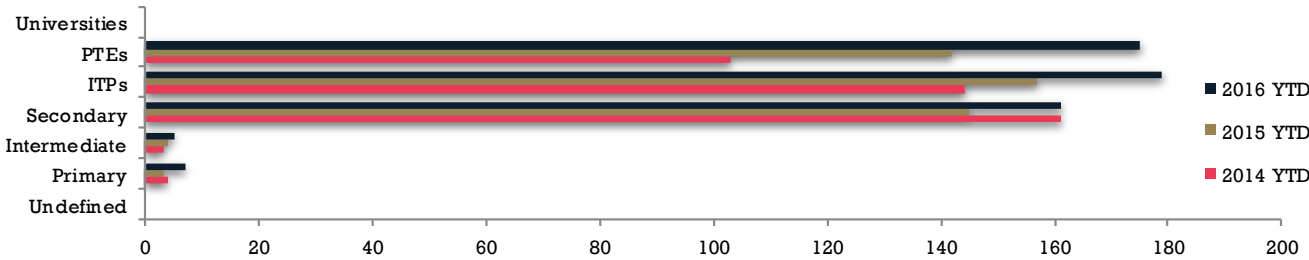
Hawke's Bay: student visas approved 2014-2016



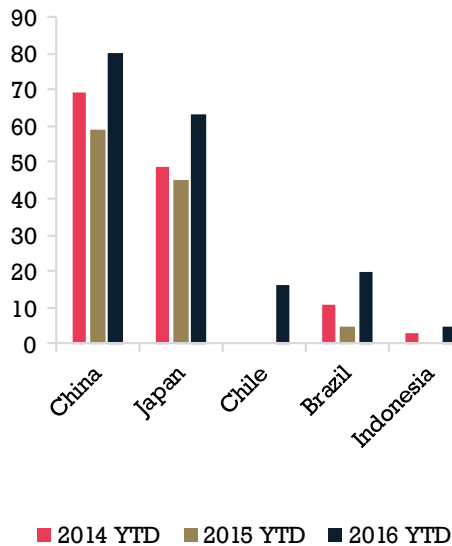
Hawke's Bay: Total student visas approved by sector, June



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



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



Top FSV shifts

June FSV	Change	% change
China	3	100%
Indonesia	3	-
Mexico	3	-
Korea	-4	-100%
India	-6	-38%
Germany	-8	-32%

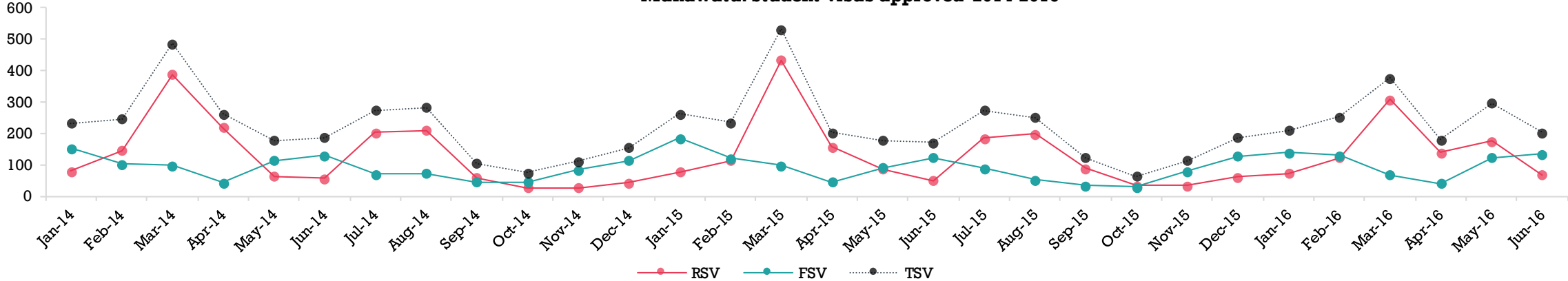
FSVs YTD	Change	% change
Chile	16	-
Brazil	15	375%
Japan	14	70%
Singapore	-2	-100%
Korea	-5	-63%
India	-11	-12%

Key takeaways:

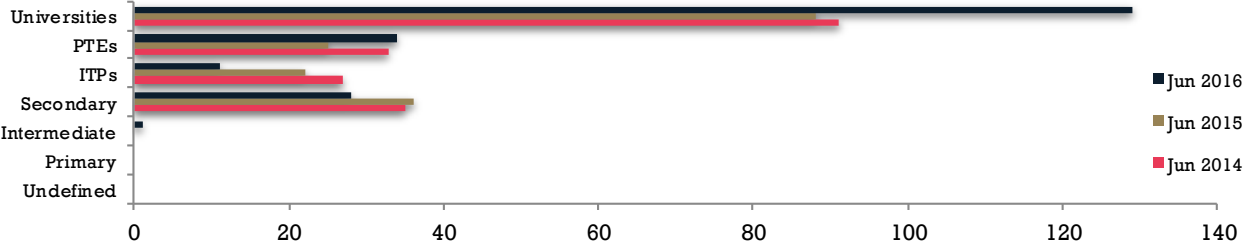
- Results are positive in Hawke's Bay, with a 24% increase in FSV seen YTD (+62). This is being driven by increases in FSV approved for Chile, Brazil and Japan.
- However, June 2016 result were down, with TSV in decline (-25%) which was driven by the decline in FSV (-26%) compared to June 2015.

June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
20  41%	12  10%	32  19%	-33  -4%	-28  -4%	-61  -4%

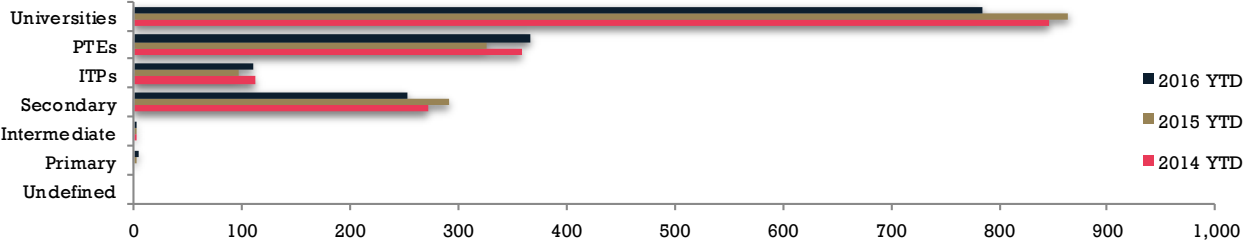
Manawatu: student visas approved 2014-2016



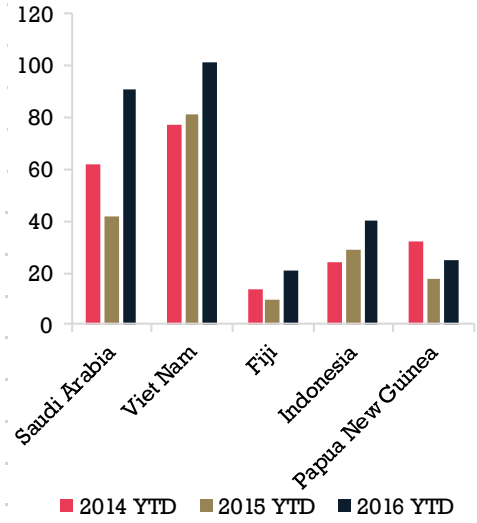
Manawatu: Total student visas approved by sector, June



Manawatu: Total student visas approved by sector, YTD



Manawatu: YTD top five market shifts (TSVs)



Top FSV shifts

June FSV	Change	% change
China	10	27%
USA	5	56%
Viet Nam	5	50%
Italy	-2	-100%
Hong Kong	-3	-75%
India	-13	-50%

FSVs YTD	Change	% change
Saudi Arabia	24	343%
Indonesia	16	200%
Germany	8	40%
India	-21	-23%
USA	-29	-35%
Thailand	-56	-78%

Key takeaways:

- Manawatu saw strong growth in June 2016, compared to June 2015 with TSV up 19% (+32) driven by the increase in RSV +41% (+20). YTD results for the region are flat with TSV, FSV and RSV all flat (-4%) for the first half of 2016. Three markets that have seen growth in FSV YTD are: Saudi Arabia (+24), Indonesia (+16) and Germany (+8). Despite the overall decline, the ITP and PTE sectors have both experienced growth in TSV approved YTD (+14, +40).



June RSV	June FSV	June TSV
11	-1	10

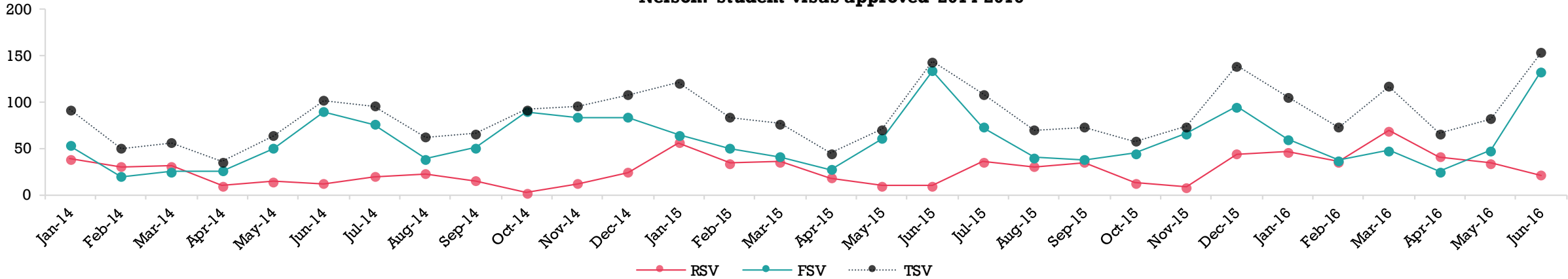
110% ↑ -1% → 7% ↑

YTD RSV	YTD FSV	YTD TSV
83	-27	56

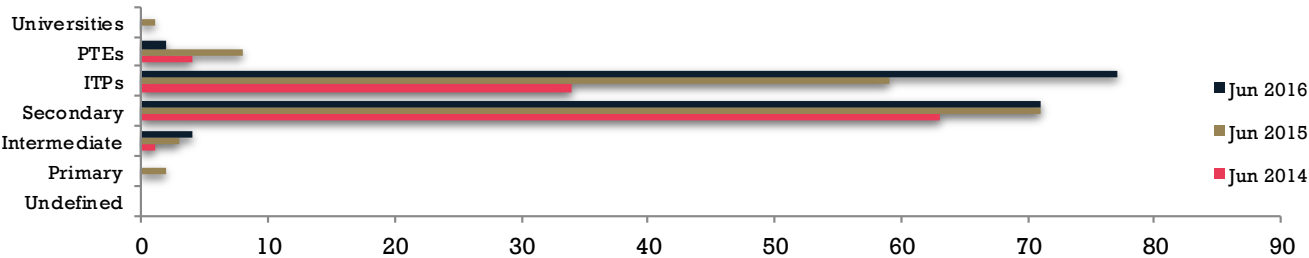
51% ↑ -7% ↓ 10% ↑

YTD (June)

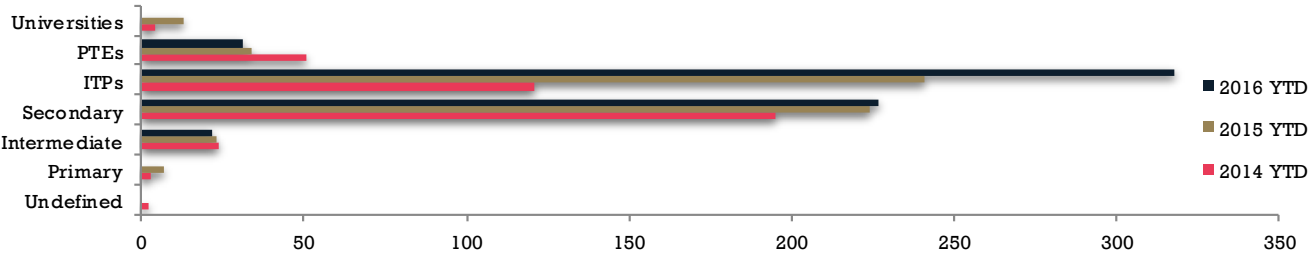
Nelson: student visas approved 2014-2016



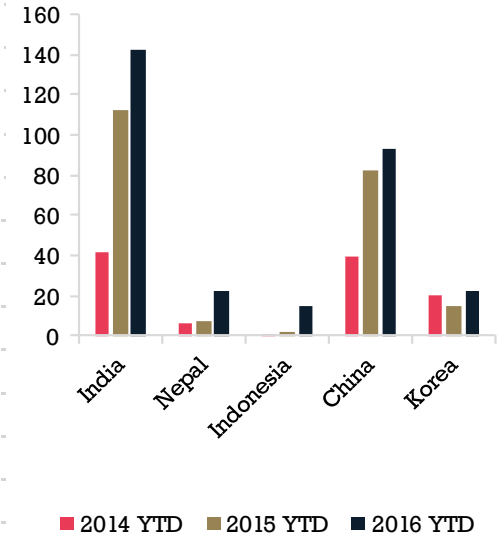
Nelson: Total student visas approved by sector, June



Nelson: Total student visas approved by sector, YTD



Nelson: YTD top five market shifts (TSVs)



Top FSV shifts

June FSV	Change	% change
Indonesia	9	900%
China	7	19%
Timor Leste	5	-
Nepal	-2	-100%
Taiwan	-2	-100%
India	-12	-92%

FSVs YTD	Change	% change
China	14	27%
Japan	12	57%
Indonesia	9	450%
Thailand	-8	-36%
Sri Lanka	-10	-67%
India	-61	-65%

Key takeaways:

- The Nelson region has experienced a decline in FSV approved YTD (-7%, -27), however a 51% increase in RSV YTD (+83) continues to boost Nelson's overall results. This increase has benefited the ITP sector, with an additional 77 TSV approved YTD (+32%) compared to 2015 YTD.
- Growth in FSV YTD are from: China (+14), Japan (+12) and Indonesia (+9).

# Northland:

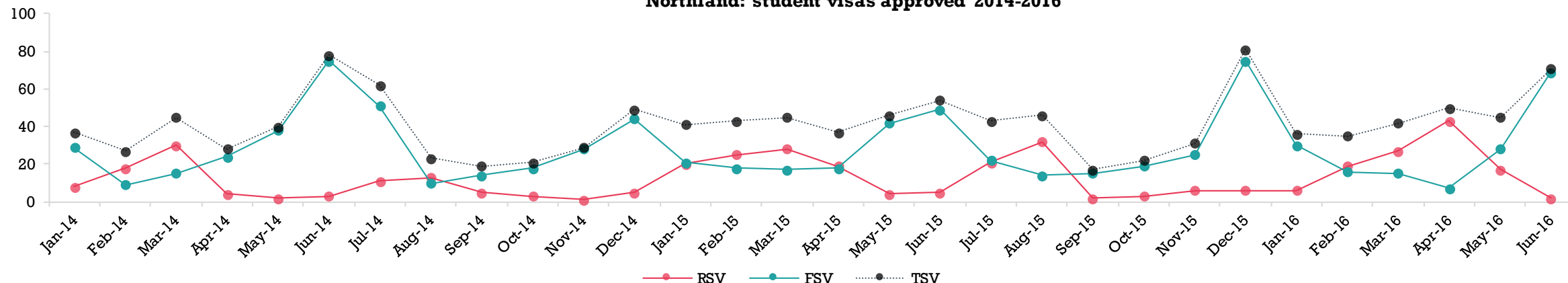


June RSV	June FSV	June TSV
-3 ↓ -60%	20 ↑ 41%	17 ↑ 31%

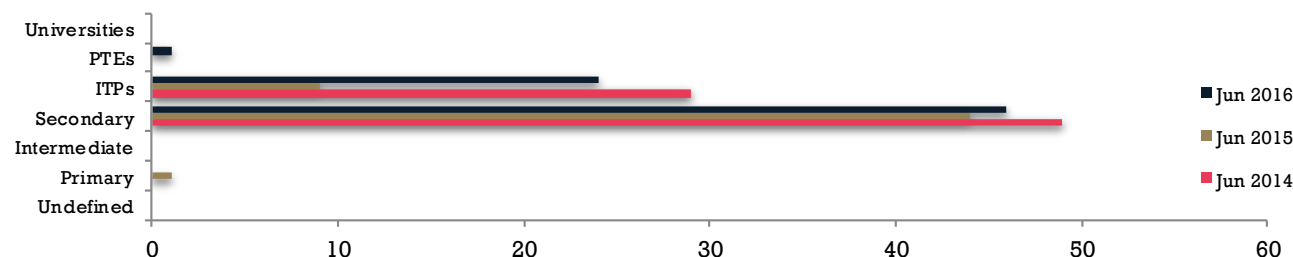
YTD RSV	YTD FSV	YTD TSV
13 ↑ 13%	0 → 0%	13 ↑ 5%

YTD (June)

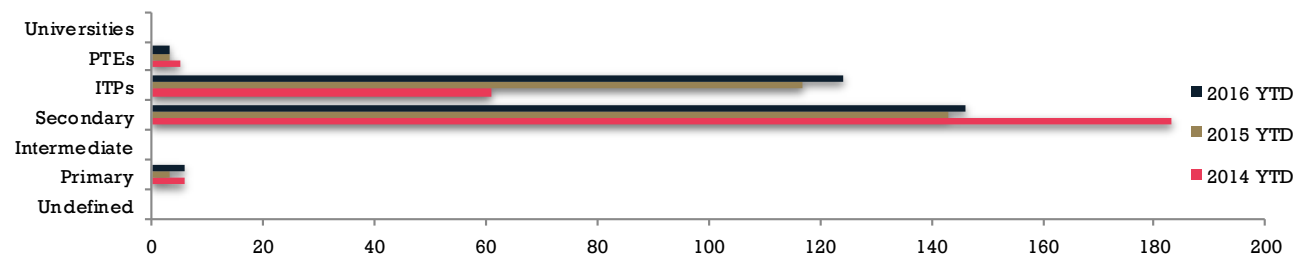
Northland: student visas approved 2014-2016



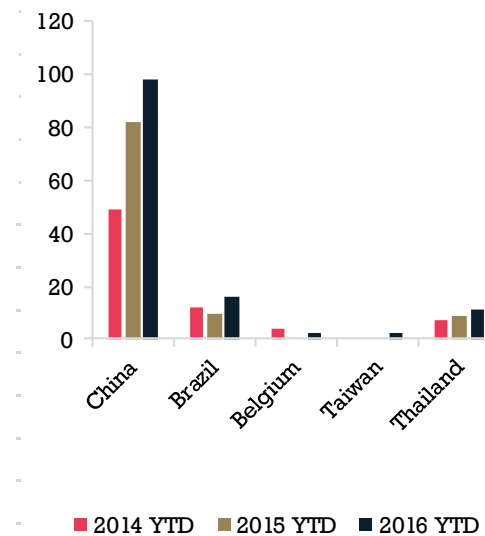
Northland: Total student visas approved by sector, June



Northland: Total student visas approved by sector, YTD



Northland: YTD top five market shifts (TSVs)



Top FSV shifts

June FSV	Change	%change
China	20	667%
Thailand	3	-
Belgium	2	-
France	-2	-100%
India	-3	-75%
Germany	-4	-21%

FSVs YTD	Change	%change
China	9	26%
Brazil	6	60%
Japan	4	133%
Korea	-3	-33%
Germany	-6	-14%
India	-7	-35%

## Key takeaways:

- Northland's results are positive with the number of TSV approved YTD up (+5%, +13). In June, there was a 41% increase in FSV which mainly affected the ITP sector and secondary schools.
- Growth in FSV YTD were from: China (+9), Brazil (+6) and Japan (+4).

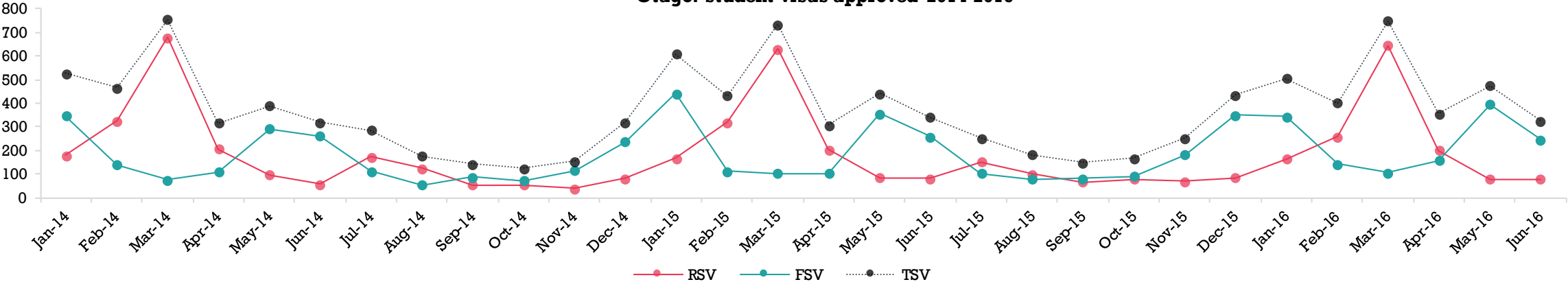




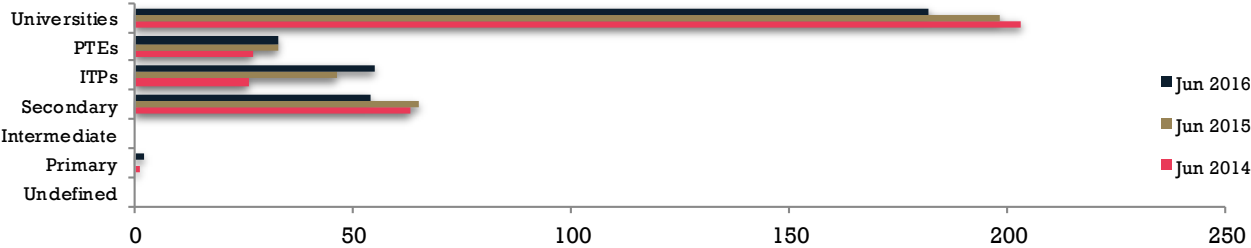
June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV
-3 ↗ -4%	-13 ↘ -5%	-16 ↘ -5%	-62 ↗ -4%	12 ↗ 1%	-50 ↗ -2%

YTD (June)

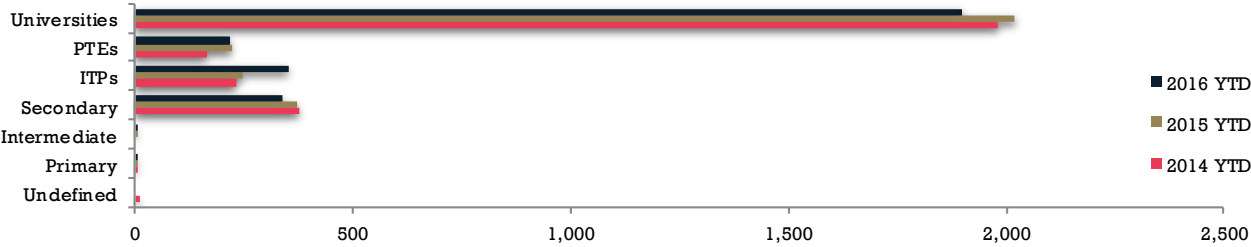
Otago: student visas approved 2014-2016



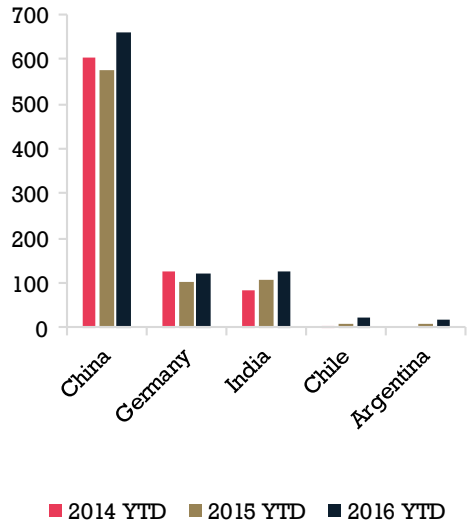
Otago: Total student visas approved by sector, June



Otago: Total student visas approved by sector, YTD



Otago: YTD top five market shifts (TSVs)



Top FSV shifts

June FSV	Change	% change
Japan	9	225%
Chile	6	-
Denmark	5	83%
UK	-6	-75%
Brazil	-8	-47%
USA	-16	-21%

FSVs YTD	Change	% change
Germany	19	22%
China	18	20%
Chile	11	138%
Malaysia	-14	-23%
Brazil	-33	-33%
USA	-63	-13%

Key takeaways:

- TSV are stable YTD for the Otago region (-2%, -50). However, June 2016 result were in decline for TSV (-5%) driven by FSV (-5%). Markets that have seen a decline in FSV TYD are: USA (-63), Brazil (-33) and Malaysia (-14).
- ITPs in the Otago region continue to experience strong growth in TSV YTD (+42%, +103) while the university sector has seen a decline (-6%, -122).

8 ↑ 21%

-6 ↓ -9%

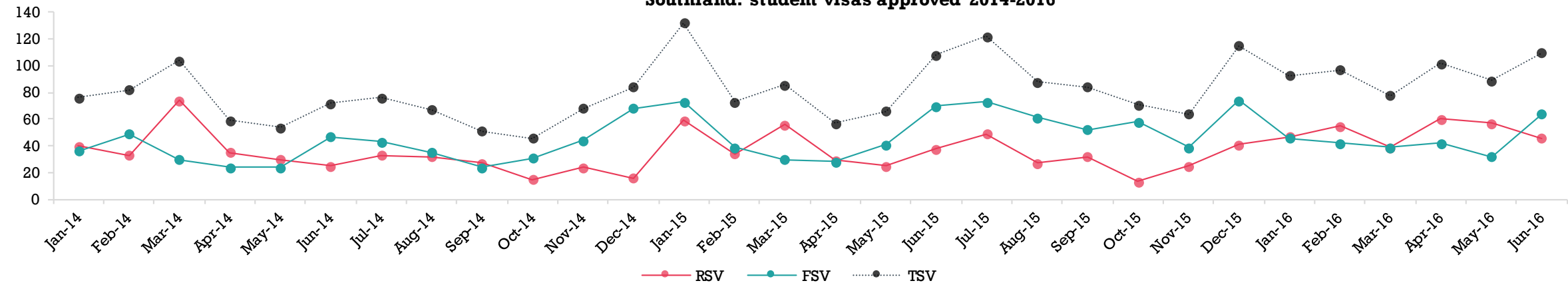
2 → 2%

63 ↑ 26%

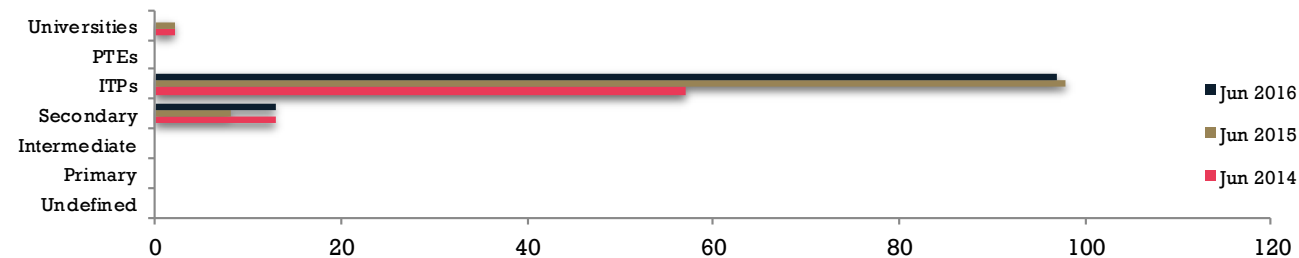
-16 ↓ -6%

47 ↑ 9%

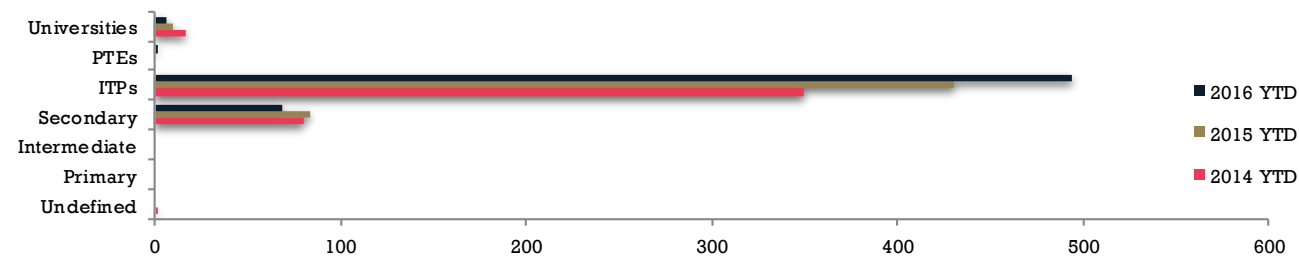
Southland: student visas approved 2014-2016



Southland: Total student visas approved by sector, June



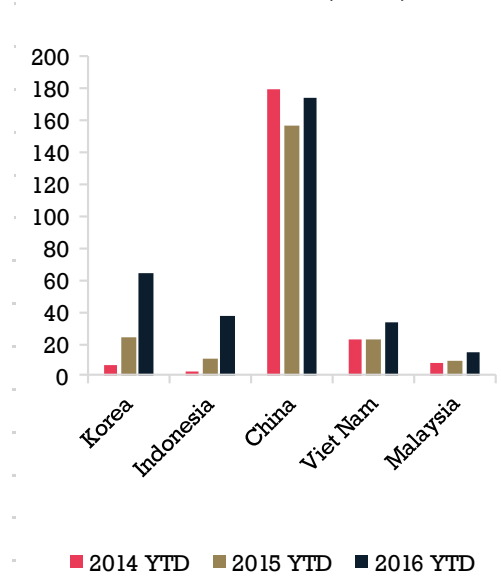
Southland: Total student visas approved by sector, YTD



Key takeaways:

- Southland is experiencing good results YTD, with TSV up 9% (+47).
- FSV were down in June (-9%), but an increase in RSV (+21%) resulted in a stable month for Southland region compared to June 2015. The increase in RSV YTD (+26%, +63) indicates that students are returning or choosing to remain in New Zealand to study.
- Growth has mainly been felt in the ITP sector YTD, up 15% (+64) being driven by China, Korea, Indonesia and Viet Nam.

Southland: YTD top five market shifts (TSVs)



Top FSV shifts

June FSV	Change	% change
Germany	7	78%
Indonesia	6	600%
Thailand	6	-
Nepal	-2	-100%
Philippines	-3	-100%
India	-25	-89%

FSVs YTD	Change	% change
Indonesia	12	109%
Korea	12	60%
China	10	30%
Fiji	-5	-83%
Bangladesh	-6	-100%
India	-50	-56%

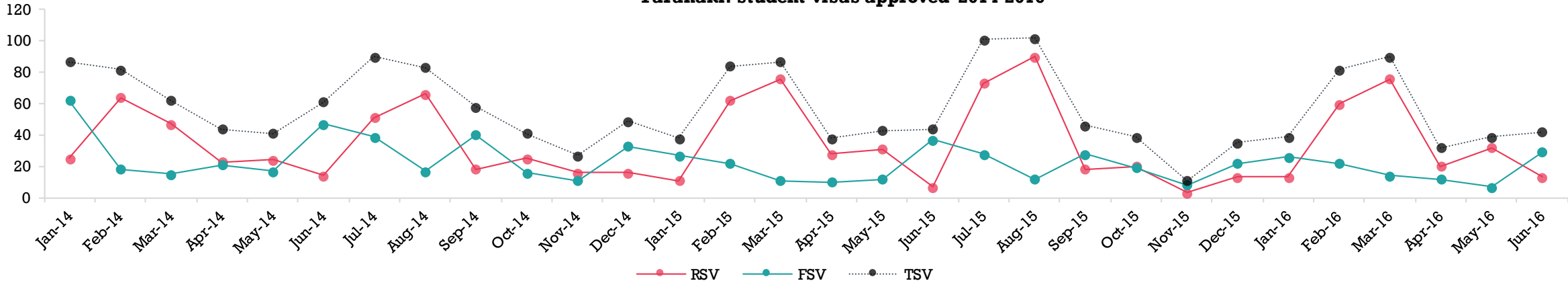


June RSV	June FSV	June TSV
6 ↑ 86%	-8 ↓ -22%	-2 ↓ -5%

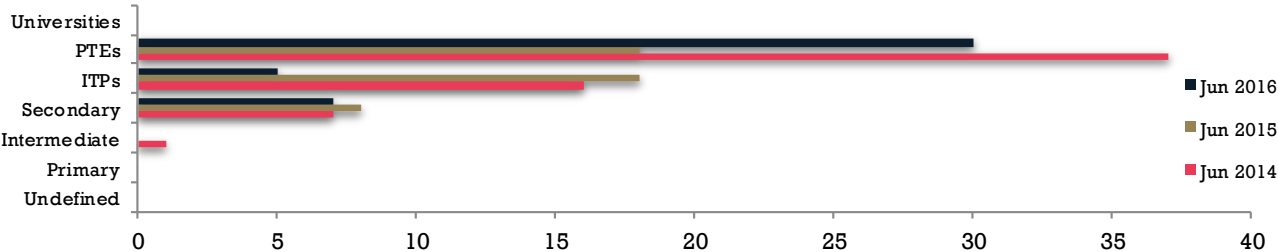
YTD RSV	YTD FSV	YTD TSV
-1 → 0%	-9 ↓ -8%	-10 → -3%

YTD (June)

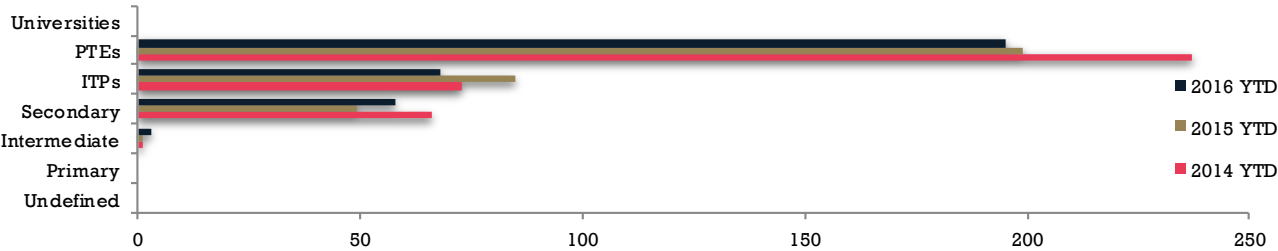
Taranaki: student visas approved 2014-2016



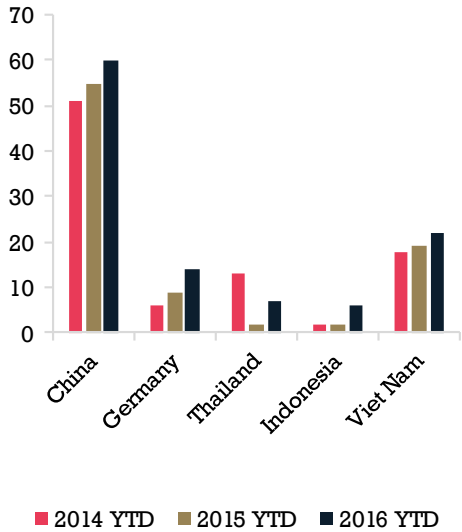
Taranaki: Total student visas approved by sector, June



Taranaki: Total student visas approved by sector, YTD



Taranaki: YTD top five market shifts (TSVs)



Top FSV shifts

June FSV	Change	% change
Indonesia	4	-
Germany	3	150%
China	2	50%
Korea	-2	-100%
Brazil	-3	-75%
India	-10	-56%

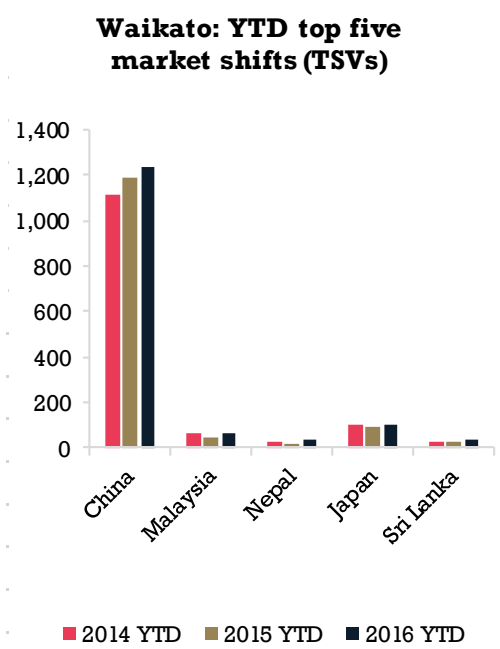
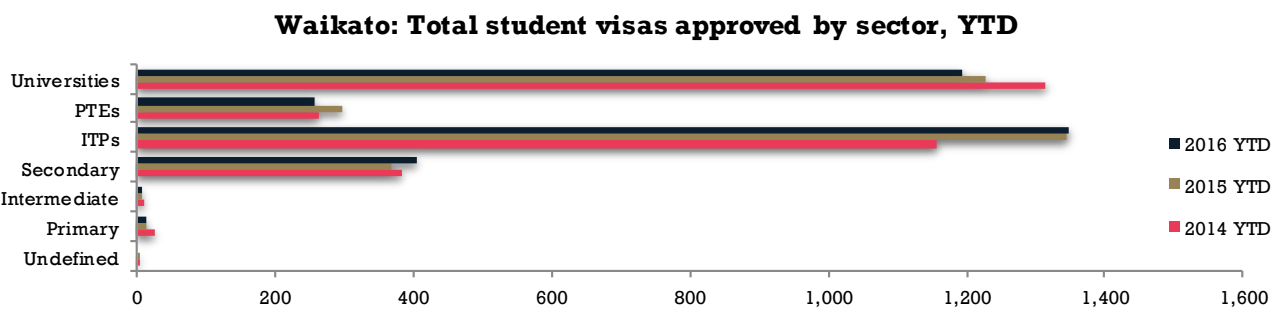
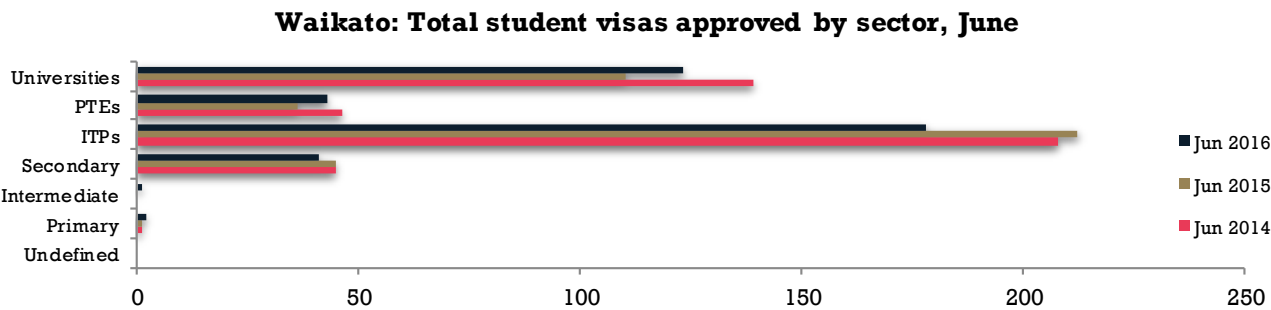
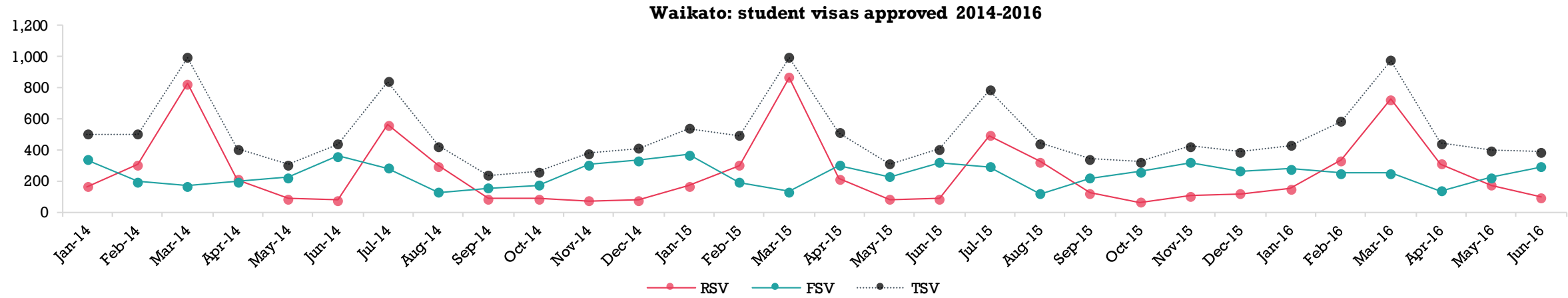
FSVs YTD	Change	% change
China	6	50%
Germany	4	44%
Indonesia	4	-
Russia	-2	-40%
South Africa	-2	-100%
India	-23	-36%

Key takeaways:

- Taranaki's results remain stable, with relatively no change compared to the same period last year (-3%, -10).
- The highest number of TSV approvals YTD were for the PTE sector, followed by ITPs and secondary schools.



June RSV	June FSV	June TSV	YTD RSV	YTD FSV	YTD TSV	YTD (June)
12 <span>↑</span> 14%	-28 <span>↓</span> -9%	-16 <span>→</span> -4%	71 <span>→</span> 4%	-106 <span>↓</span> -7%	-35 <span>→</span> -1%	



Top FSV shifts		
June FSV	Change	% change
Japan	18	225%
Russia	4	-
Chile	3	300%
USA	-4	-33%
Philippines	-6	-20%
India	-31	-30%

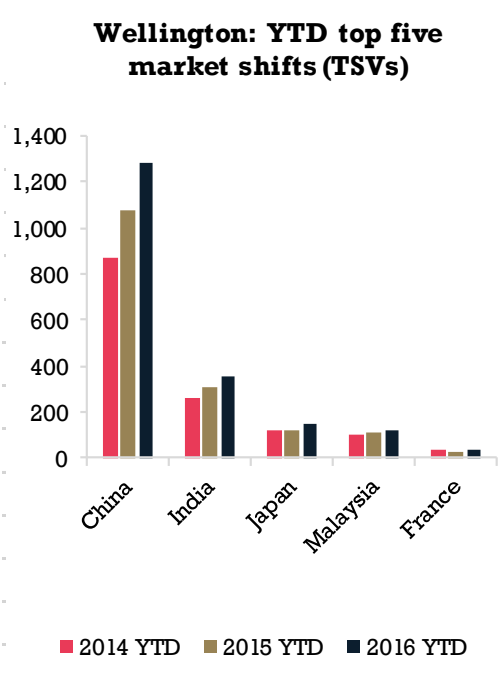
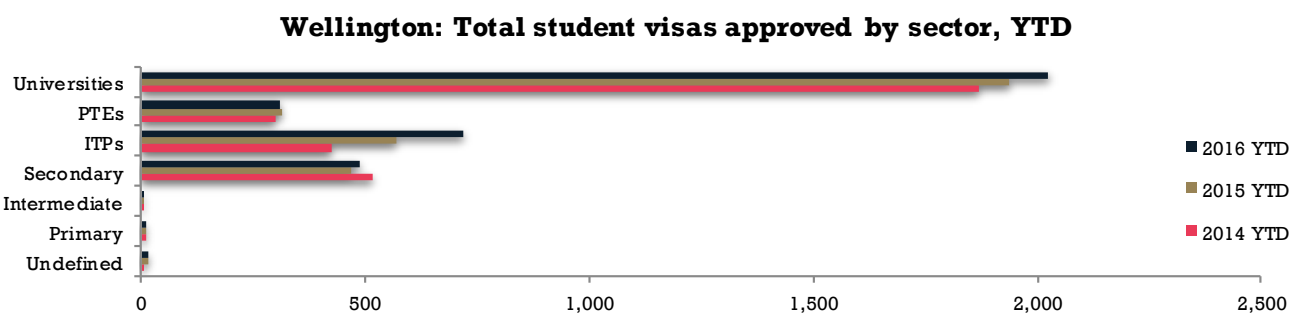
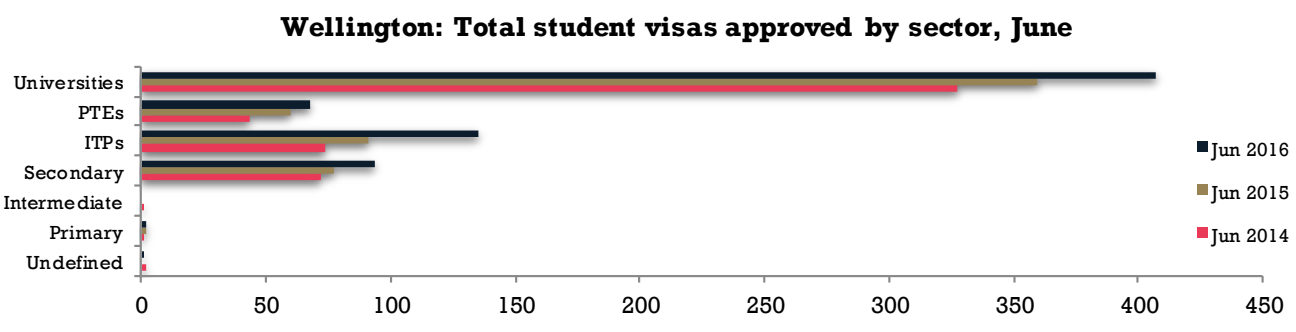
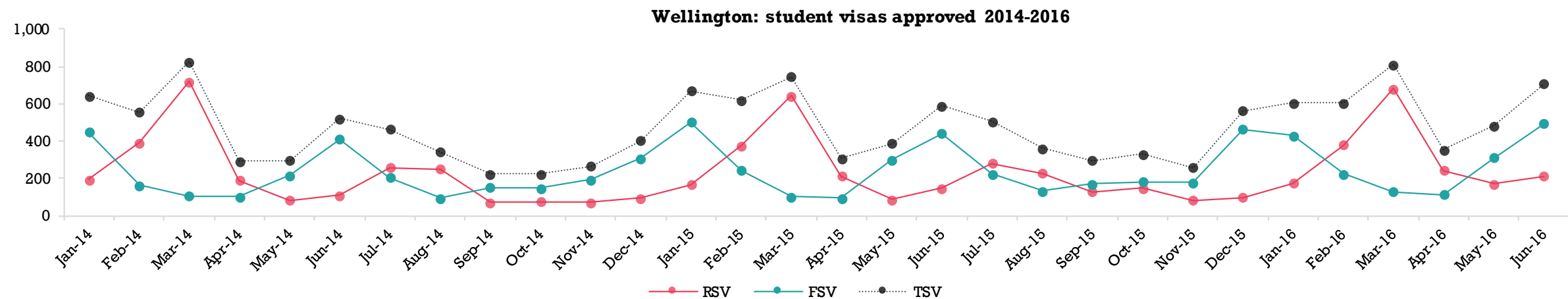
FSVs YTD		
FSVs YTD	Change	% change
Malaysia	16	229%
Japan	14	33%
Thailand	12	63%
Korea	-17	-40%
UK	-18	-16%
India	-51	-11%

Key takeaways:

- Overall results for the Waikato region are stable YTD (-35) despite a decline in FSV YTD (-7% -106), which is being driven by decreases from India, the UK and Korea.
- FSV were down in June (-9%), however, an increase in RSV (+14%) resulted in a stable result for the Waikato region this month, compared to the same month last year.
- The decline in FSV in June was driven by India (-31), the Philippines (-6) and the USA (-4).

June RSV	June FSV	June TSV
64  43%	54  12%	118  20%

YTD RSV	YTD FSV	YTD TSV
233  14%	12  1%	245  7%



**Top FSV shifts**

June FSV	Change	% change
China	21	25%
Japan	18	257%
India	11	25%
Norway	-4	-67%
Timor Leste	-5	-100%
USA	-6	-14%

**FSVs YTD**

FSVs YTD	Change	% change
Japan	29	36%
Malaysia	22	38%
China	19	6%
Denmark	-13	-50%
Peru	-17	-100%
USA	-59	-21%

**Key takeaways:**

- An increase in RSV YTD (+14%; +233), is driving Wellington's results up compared to the same period last year. The region also continues to see improvements for FSV (+12%, +54) in June 2016. Markets contributing to the increase in FSV this June include: China (+21), Japan (+18) and India (+11).
- The growth in TSV YTD is being felt mainly in the ITP sector, up 26% (+147).