

Student Visa Dashboard September 2015

Regional and sector overview



Introduction

Introduction

- *The regional dashboard is a new Intelligence product developed by Education New Zealand to provide timely and relevant international student data to the international education industry. It presents and analyses New Zealand's regional international student visa trends, providing a monthly round up of where in New Zealand international students are choosing to study, and what sectors they're in by region.*
- *The regional student visa dashboard complements the existing [Market Student Visa Dashboard](#), which provides analysis of INZ data by market and sector across the whole of New Zealand.*
- *Student visas are the most readily available international student data on a regular basis, as there is only a one month lag between student visas being approved and Immigration New Zealand (INZ) publishing the data. Student visa data is a strong indicator of whether students are entering, remaining in, or leaving New Zealand. This provides a useful predictor for future enrolment trends.*
- *Student visa trends allow us to analyse two key indicators:*
 - *growth of new student numbers (first time student visas)*
 - *retention of international students within New Zealand (returning student visas)*
- *First time student visas are a valuable indicator of growth as they represents new students entering the international education pipeline. This information can be a useful indicator for industry on efforts to attract new international students.*
- *The number of total student visas includes first time student visas, and returning student visas. The number of returning student visas can provide a useful indicator to industry of students' experiences in New Zealand, and their desire to continue their studies here.*
- *ENZ utilises its knowledge of the global international education market and available data to provide a range of Intelligence services and products to New Zealand's international education industry, helping the industry identify growth opportunities. ENZ welcomes feedback on this Dashboard. Please email intelligence@enz.govt.nz*

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 of less than three months are not required to enter on a student visa. Students who choose to enter on a visitor visa (usually from visa-free nationalities) are not captured in this dashboard.
 - This impacts 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 represent the actual number of students currently in New Zealand.
- **Methodology:**
 - The following Dashboard's methodology has been revised to exclude dependents, applicants under Section 61, and Variation of Conditions. Dashboards prior to May 2015 include approvals from "all" applicants, including dependants.
- **Work in progress:**
 - ENZ is currently working on understanding:
 - the true demand of student visas – i.e. TSV applications vs. TSVs approved
 - the correlation between ENZ activity and policy changes on FSV trends
 - the impact of RSV on overall trends.
 - a relatively large number of "not recorded" entries for FSVs at the provider level
 - the correlation between student visas and enrolments
- **Note:**
 - Due to the way Immigration New Zealand captures regional information, the Manawatu region also includes Wanganui.
- **Abbreviations:**
 - YTD: Year-to-date
 - TSV: total student visa
 - FSV: first time student visa
 - RSV: returning student visa

Key trends

YTD

- Growth in total student visas (TSV) has been driven by the Auckland, Canterbury, Wellington, and Bay of Plenty regions.
- YTD TSVs increased by 12% (7,922) and first time student visas (FSV) increased by 12% (3,646). Returning student visas also increased by 12% (4,286).
- The ITPs, PTEs, and universities have experienced the strongest YTD growth in FSVs, up 45% (1,792), 8% (1,203), and 8% (514).

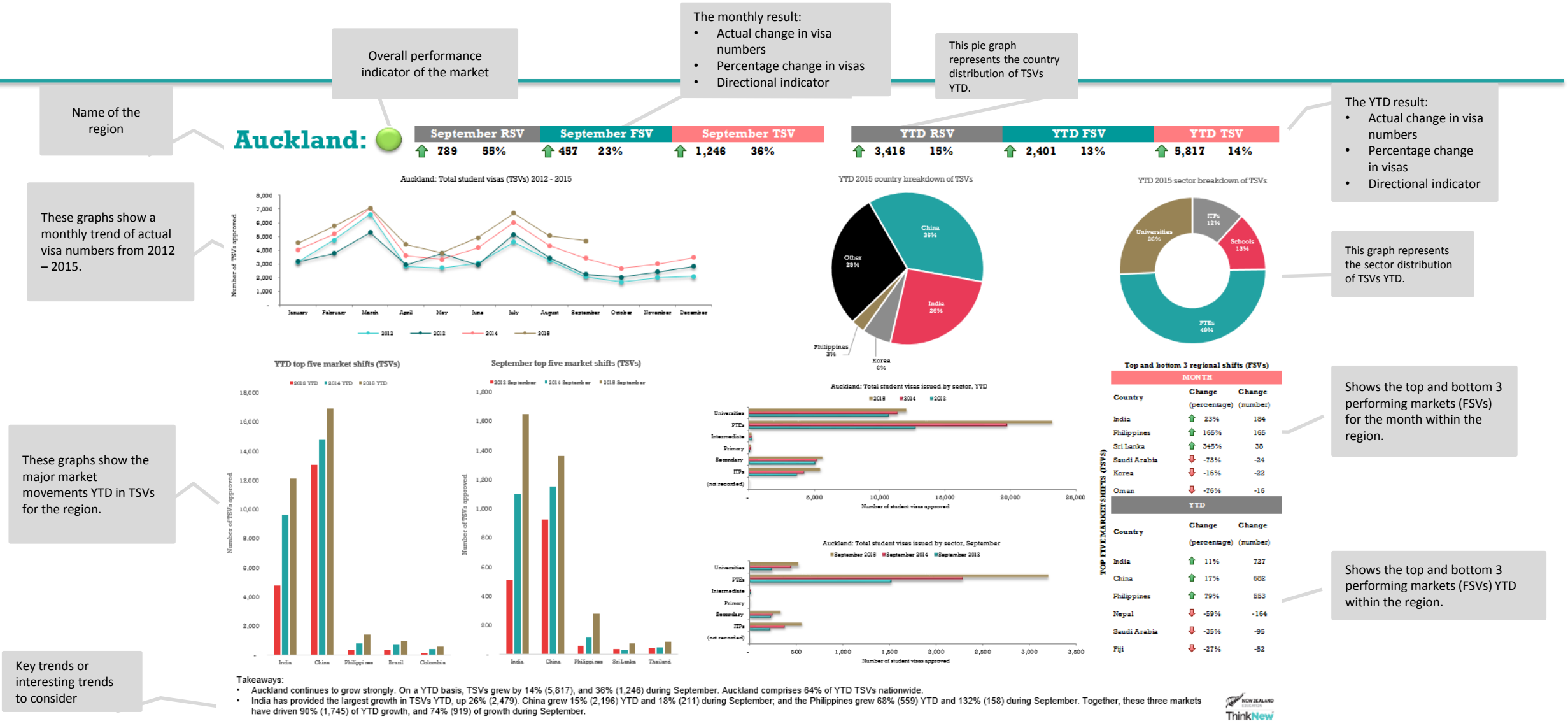
September

- September was a significant month for student visa approvals with a 37% (1,790) increase in TSVs and a 23% (668) increase in FSVs, on 2014.
- September TSV growth was driven by Auckland, Bay of Plenty, and Canterbury.
- All sectors except intermediate schools experienced growth in TSVs.

Increases	TSVs for September	Change	% change
	Auckland	1,246	36%
	Bay of Plenty	126	131%
	Canterbury	122	33%
	Waikato	109	46%
	Wellington	75	34%
Decreases	Taranaki	-12	-21%
	Northland	-1	-5%
Sector TSVs for September			
Change			
% change			
PTEs			
ITPs			
Universities			
Secondary			
Primary			
Intermediate			

































FSVs for September	Change	% change
Auckland	457	23%
Canterbury	73	32%
Waikato	69	45%
Bay of Plenty	50	79%
Southland	29	121%
Nelson	-12	-24%
Manawatu	-12	-26%
Taranaki	-12	-30%
Sector FSVs for September		
Change		
% change		
PTEs		
ITPs		
Secondary		
Primary		
Intermediate		
Universities		

How to read the dashboard



Overall YTD regional performance

(Listed in order of 2015 volume)

Indicator	YTD TSVs	2014	2015	Change in numbers	% change		Indicator	YTD FSVs	2014	2015	Change in numbers	% change
	Auckland	41,051	46,868	5,817	14%			Auckland	18,683	21,084	2,401	13%
	Canterbury	5,774	6,564	790	14%			Canterbury	2,784	3,130	346	12%
	Waikato	4,654	4,828	174	4%			Wellington	1,896	2,213	317	17%
	Wellington	4,159	4,484	325	8%			Waikato	2,043	2,168	125	6%
	Otago	3,377	3,452	75	2%			Otago	1,482	1,645	163	11%
	Manawatu	2,255	2,230	- 25	-1%			Bay of Plenty	849	877	28	3%
	Bay of Plenty	1,416	1,619	203	14%			Manawatu	827	838	11	1%
	Southland	645	824	179	28%			Nelson	430	530	100	23%
	Nelson	624	795	171	27%			Southland	315	472	157	50%
	Hawkes Bay	581	638	57	10%			Hawkes Bay	330	357	27	8%
	Taranaki	608	583	- 25	-4%			Northland	265	217	- 48	-18%
	Northland	359	373	14	4%			Taranaki	276	188	- 88	-32%
	Gisborne	31	25	- 6	-19%			Marlborough	2	12	10	500%
	Marlborough	4	15	11	275%			Gisborne	14	9	- 5	-36%
	West Coast	7	10	3	43%			West Coast	5	7	2	40%
	Grand Total	65,826	73,748	7,922	12%			Grand Total	30,418	34,064	3,646	12%

Overall YTD market performance

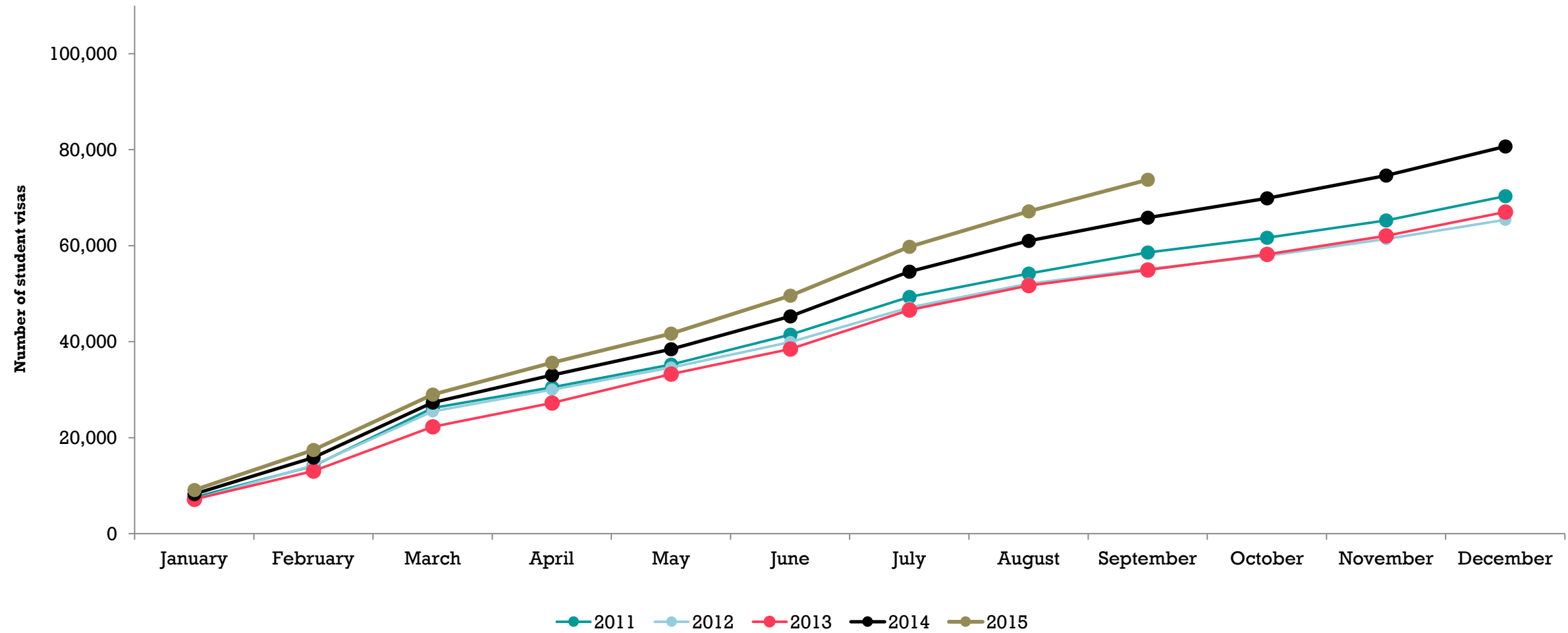
(Listed in order of 2015 volume)

Indicator	YTD TSVs	2014	2015	Change in numbers	% change
●	China	21,638	24,819	3,181	15%
●	India	13,620	17,046	3,426	25%
●	Korea	4,167	4,032	- 135	-3%
●	Japan	2,530	2,523	- 7	0%
●	USA	1,752	2,066	314	18%
●	Philippines	1,014	1,953	939	93%
●	Thailand	1,932	1,932	-	0%
●	Saudi Arabia	2,191	1,792	- 399	-18%
●	Brazil	1,366	1,520	154	11%
●	Viet Nam	1,405	1,358	- 47	-3%
●	Malaysia	1,232	1,266	34	3%
●	Germany	1,320	1,210	- 110	-8%
●	Hong Kong	937	974	37	4%
●	Sri Lanka	573	733	160	28%
●	Colombia	553	729	176	32%
●	Fiji	781	720	- 61	-8%
●	Taiwan	744	711	- 33	-4%
●	Indonesia	569	631	62	11%
●	Nepal	684	566	- 118	-17%
●	Russia	503	530	27	5%
●	Grand Total	65,826	73,748	7,922	12%

Indicator	YTD FSVs	2014	2015	Change in numbers	% change
●	India	9,222	10,346	1,124	12%
●	China	5,706	6,759	1,053	18%
●	USA	1,457	1,794	337	23%
●	Philippines	811	1,749	938	116%
●	Korea	1,514	1,509	- 5	0%
●	Japan	1,321	1,373	52	4%
●	Brazil	1,184	1,254	70	6%
●	Germany	1,112	1,030	- 82	-7%
●	Thailand	965	853	- 112	-12%
●	Colombia	455	554	99	22%
●	Malaysia	309	439	130	42%
●	Viet Nam	376	405	29	8%
●	Sri Lanka	226	390	164	73%
●	Chile	322	374	52	16%
●	Great Britain	305	337	32	10%
●	France	301	277	- 24	-8%
●	Indonesia	252	273	21	8%
●	Saudi Arabia	438	262	- 176	-40%
●	Bangladesh	199	258	59	30%
●	Nepal	514	250	- 264	-51%
●	Grand Total	30,418	34,064	3,646	12%

Overall YTD tracker

Cumulative total



- Takeaways:
- 2015 is currently tracking strongly above previous years, and is up 12% YTD.

Overall:

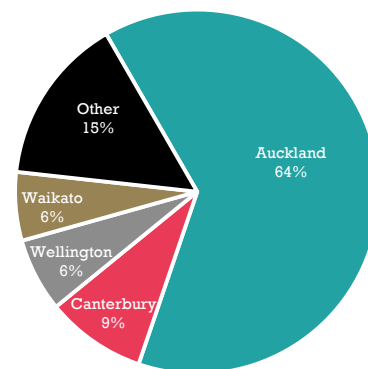
September RSV	September FSV	September TSV
 1,122 58%	 668 23%	 1,790 37%

YTD RSV	YTD FSV	YTD TSV
 4,276 12%	 3,646 12%	 7,922 12%

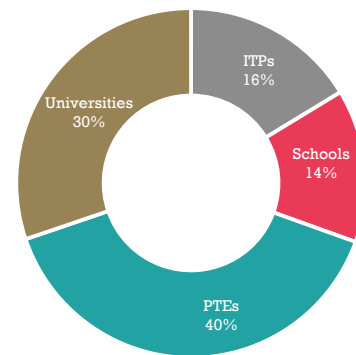
All: Total student visas (TSV) 2012 - 2015



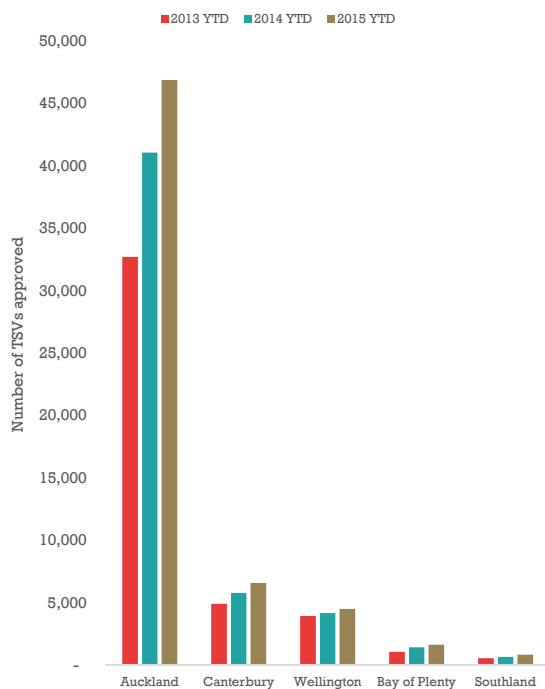
YTD 2015 country breakdown of TSVs



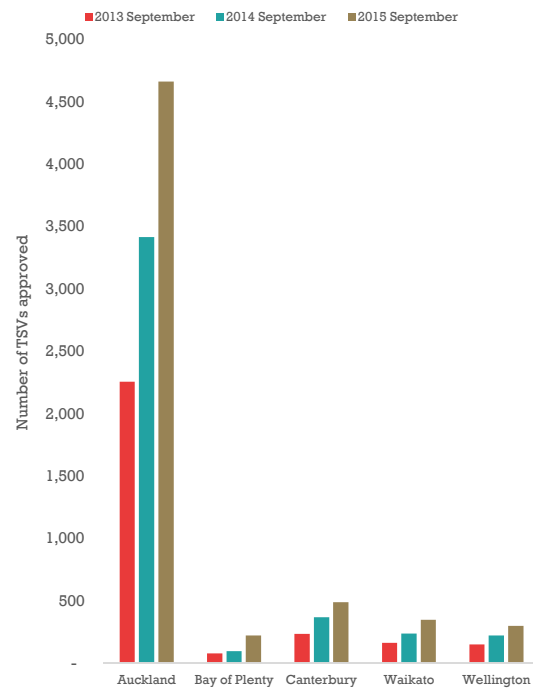
YTD 2015 sector breakdown of TSVs



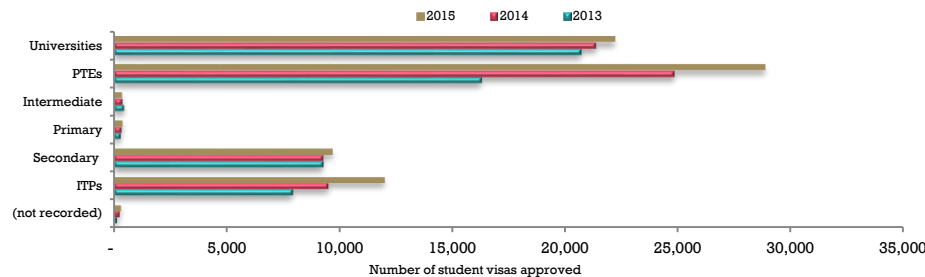
YTD top five regional shifts (TSVs)



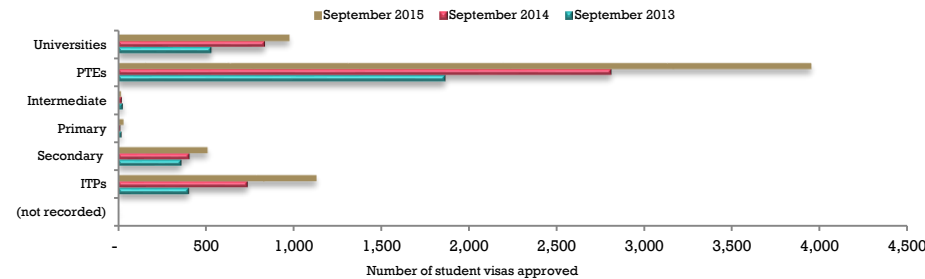
September top five regional shifts (TSVs)















All: Total student visas issued by sector, YTD



All: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

TOP FIVE MARKET SHIFTS (FSVs)	MONTH		
	Country	Change (percentage)	Change (number)
	Auckland	 23%	457
	Canterbury	 32%	73
	Waikato	 45%	69
	Nelson	 -24%	-12
	Manawatu	 -26%	-12
	Taranaki	 -30%	-12
	YTD		
	Country	Change (percentage)	Change (number)
	Auckland	 13%	2401
	Canterbury	 12%	346
	Wellington	 17%	317
	Taranaki	 -32%	-88
	Northland	 -18%	-48
	Gisborne	 -36%	-5

Takeaways:

- YTD TSVs are growing strongly, up 12% (7,922). September was a particularly strong month, increasing by 58% in RSVs (1,122) and 23% in FSVs (668). Together, this led to a 37% (1,790) growth in TSVs.
- Auckland has captured a significant proportion of YTD and September growth. YTD, 64% of TSVs were for studying within the Auckland region. Canterbury is also growing strongly, with 9% of TSVs YTD.
- Other regions that have grown strongly YTD in TSVs include: Wellington, up 8% (325); Bay of Plenty, up 14% (203); and Southland, up 28% (179).

Auckland:



September RSV
↑ 789 55%

September FSV
↑ 457 23%

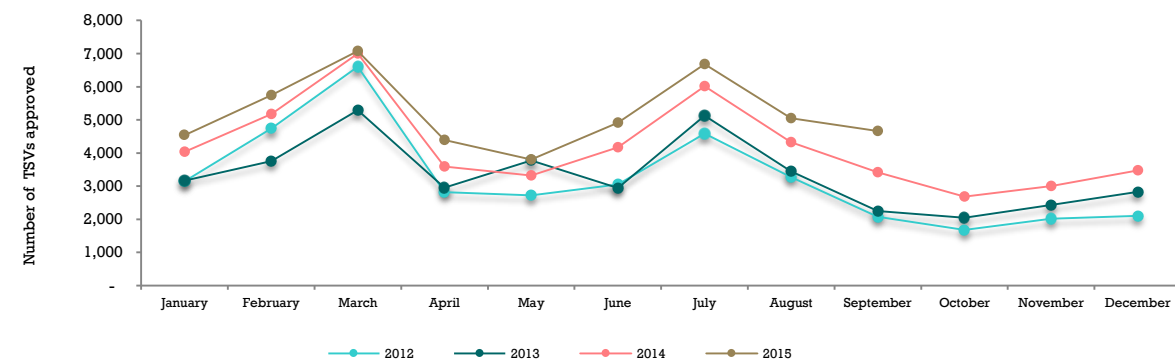
September TSV
↑ 1,246 36%

YTD RSV
↑ 3,416 15%

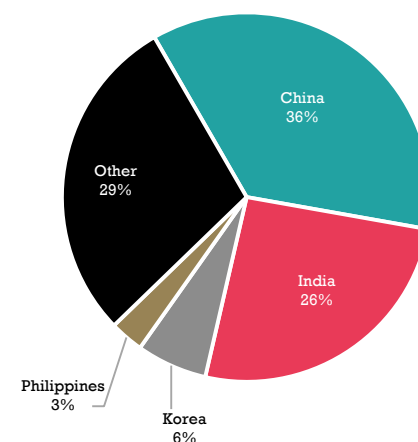
YTD FSV
↑ 2,401 13%

YTD TSV
↑ 5,817 14%

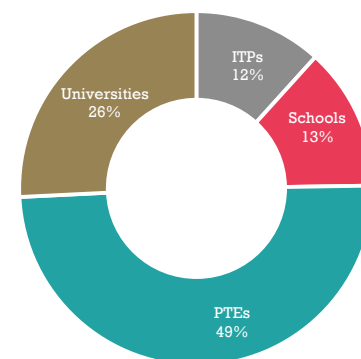
Auckland: Total student visas (TSVs) 2012 - 2015



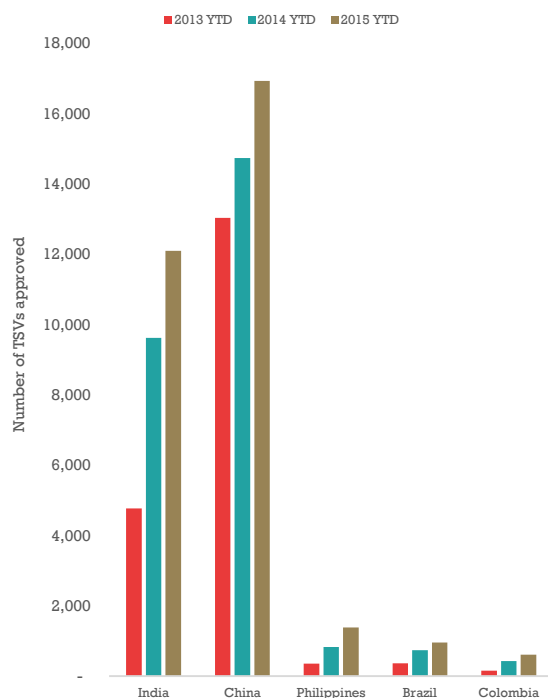
YTD 2015 country breakdown of TSVs



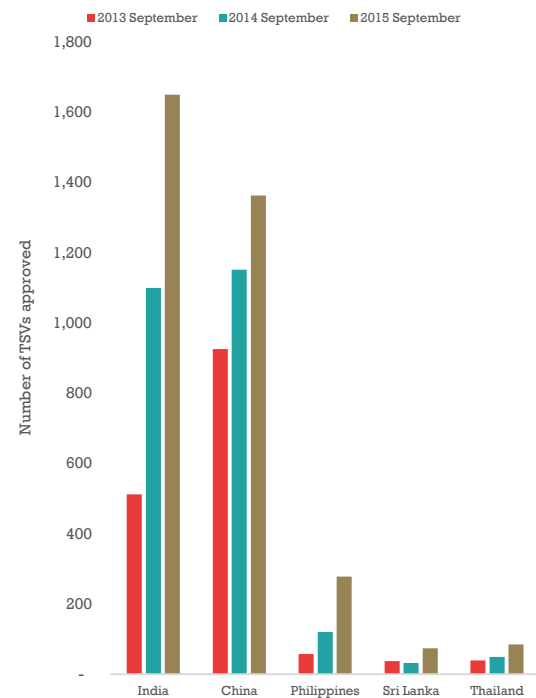
YTD 2015 sector breakdown of TSVs



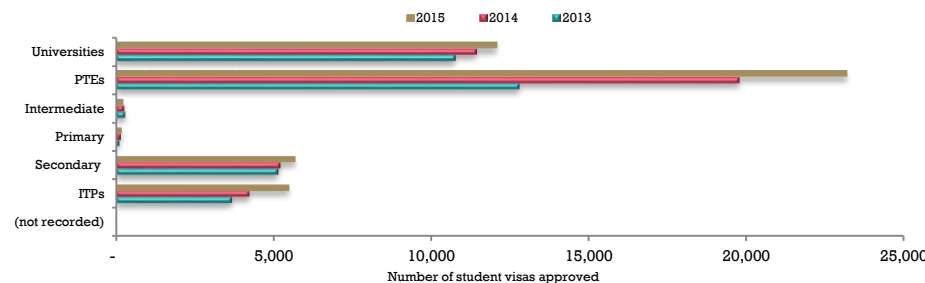
YTD top five market shifts (TSVs)



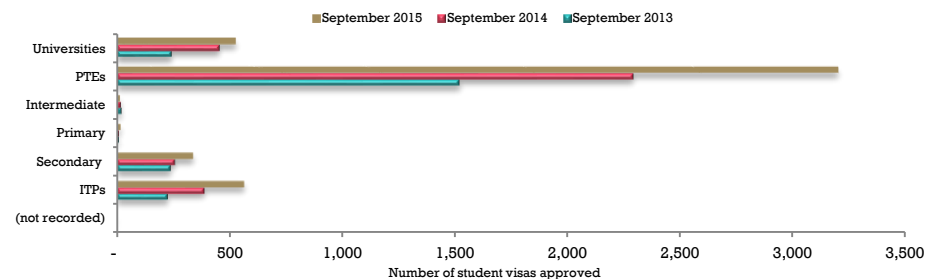
September top five market shifts (TSVs)



Auckland: Total student visas issued by sector, YTD



Auckland: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
India	↑ 23%	184
Philippines	↑ 165%	165
Sri Lanka	↑ 345%	38
Saudi Arabia	↓ -73%	-24
Korea	↓ -16%	-22
Oman	↓ -76%	-16
YTD		

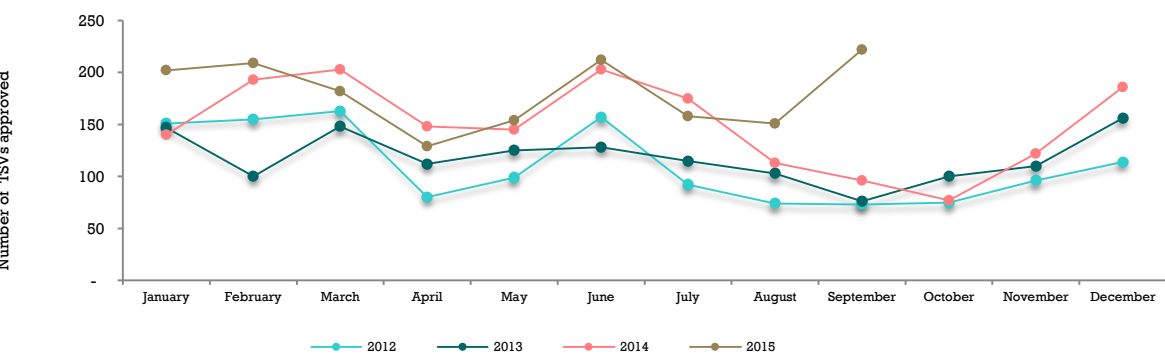
TOP FIVE MARKET SHIFTS (FSVs)

Country	Change (percentage)	Change (number)
India	↑ 11%	727
China	↑ 17%	682
Philippines	↑ 79%	553
Nepal	↓ -59%	-164
Saudi Arabia	↓ -35%	-95
Fiji	↓ -27%	-52

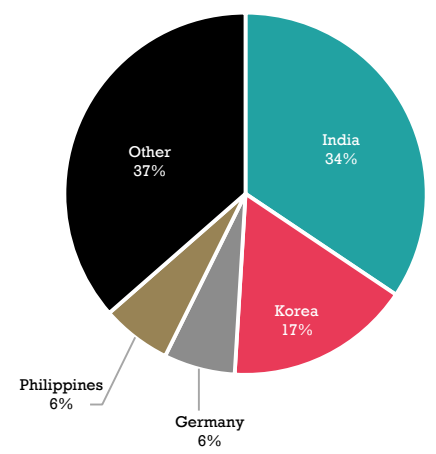
Takeaways:

- Auckland continues to grow strongly. On a YTD basis, TSVs grew by 14% (5,817), and 36% (1,246) during September. Auckland comprises 64% of YTD TSVs nationwide.
- India has provided the largest growth in TSVs YTD, up 26% (2,479). China grew 15% (2,196) YTD and 18% (211) during September; and the Philippines grew 68% (559) YTD and 132% (158) during September. Together, these three markets have driven 90% (1,745) of YTD growth, and 74% (919) of growth during September.

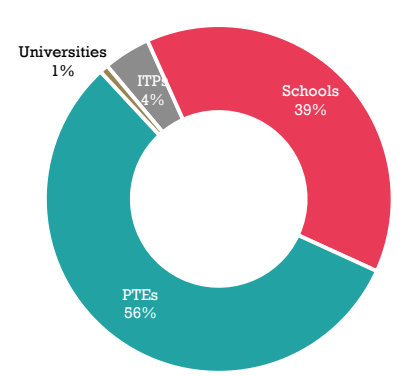
Bay of Plenty: Total student visas (TSV) 2012 - 2015



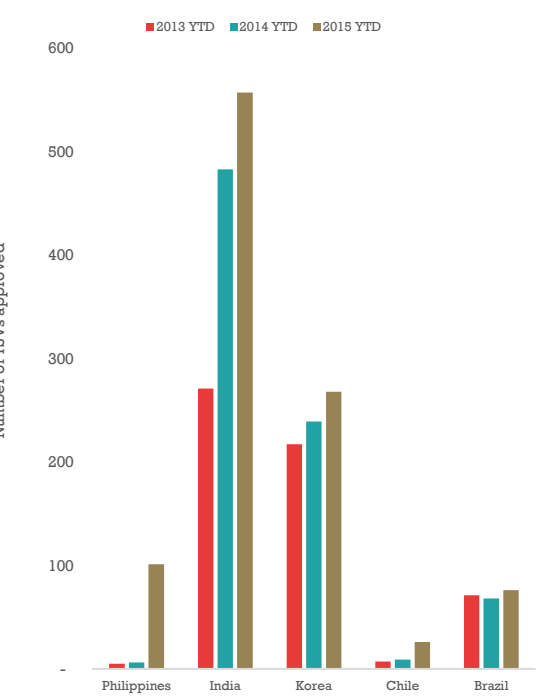
YTD 2015 country breakdown of TSVs



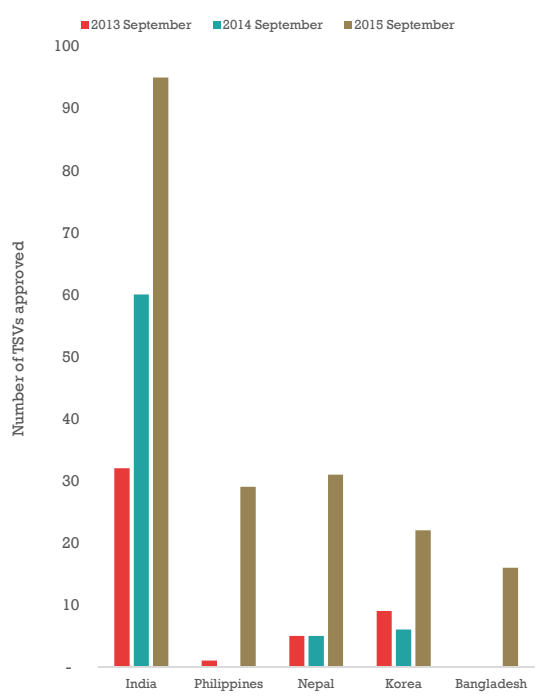
YTD 2015 sector breakdown of TSVs



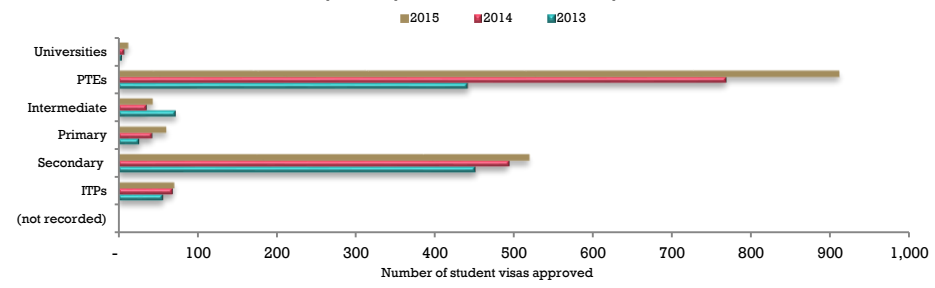
YTD top five market shifts (TSVs)



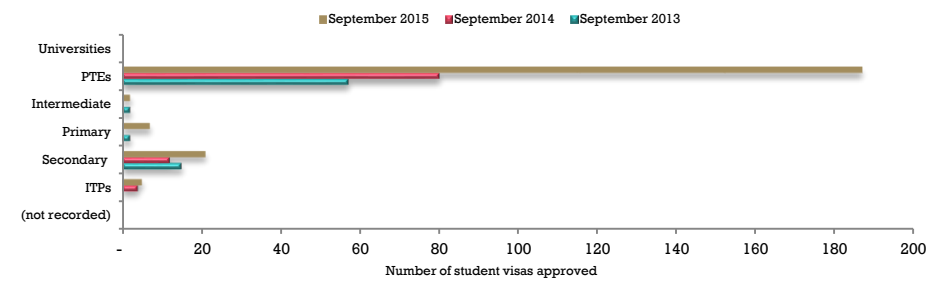
September top five market shifts (TSVs)



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



Bay of Plenty: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Philippines	NA	29
Korea	1600%	16
Nepal	125%	5
India	-11%	-4
Japan	-67%	-4
Saudi Arabia	-67%	-2
YTD		
Country	Change (percentage)	Change (number)
Philippines	3167%	95
Chile	178%	16
China	86%	12
Nepal	-61%	-40
India	-9%	-26
Bangladesh	-63%	-25

- Takeaways:
- The Bay of Plenty (BOP) has provided strong TSV growth of 14% (203) YTD and 131% (126) during September.
 - The Philippines has increased by 1,583% (95) YTD, comprising 47% of BOP's total TSV increase. During September, India gained 58% (35).
 - Nepal, India, and Bangladesh have declined YTD in FSVs.



September RSV
↑ 49 36%

September FSV
↑ 73 32%

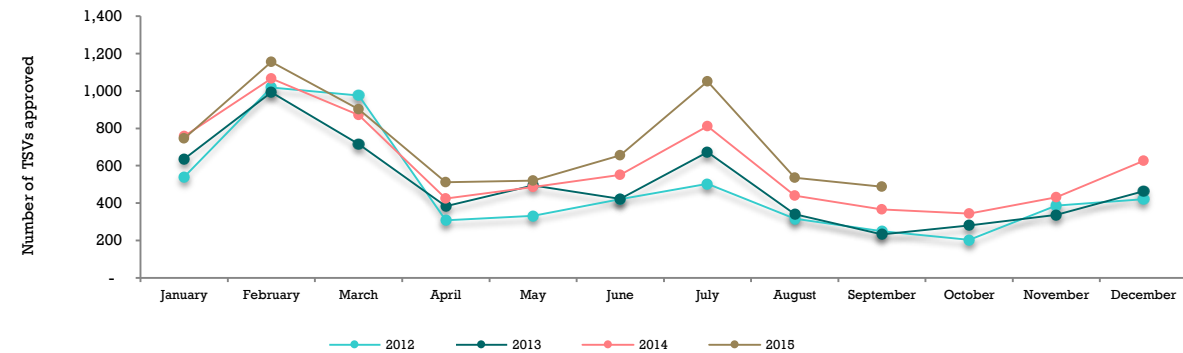
September TSV
↑ 122 33%

YTD RSV
↑ 444 15%

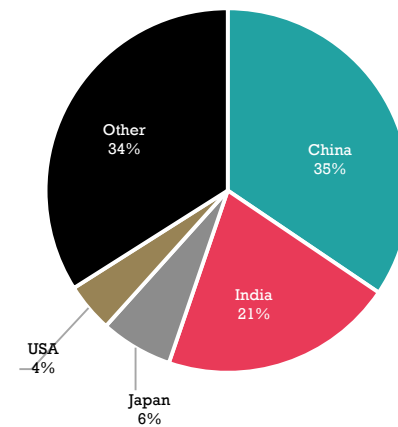
YTD FSV
↑ 346 12%

YTD TSV
↑ 790 14%

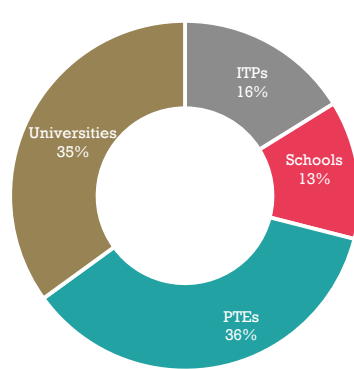
Canterbury: Total student visas (TSV) 2012 - 2015



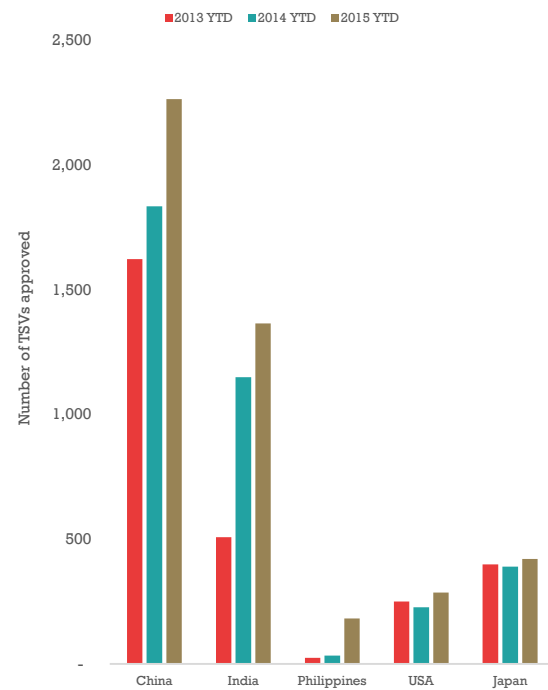
YTD 2015 country breakdown of TSVs



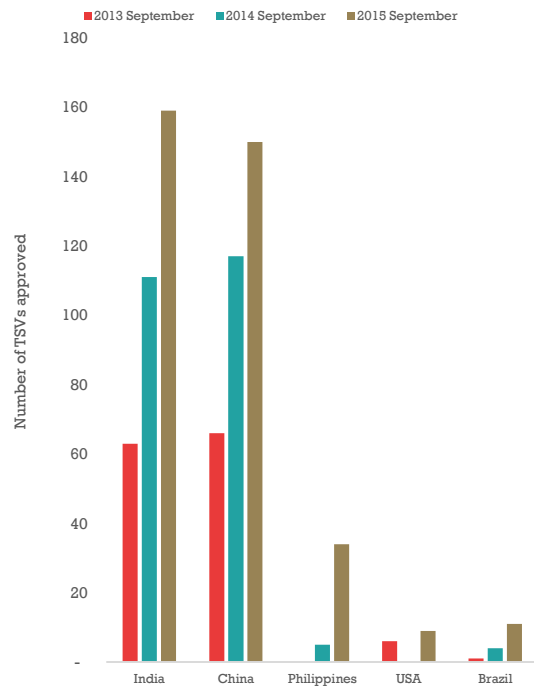
YTD 2015 sector breakdown of TSVs



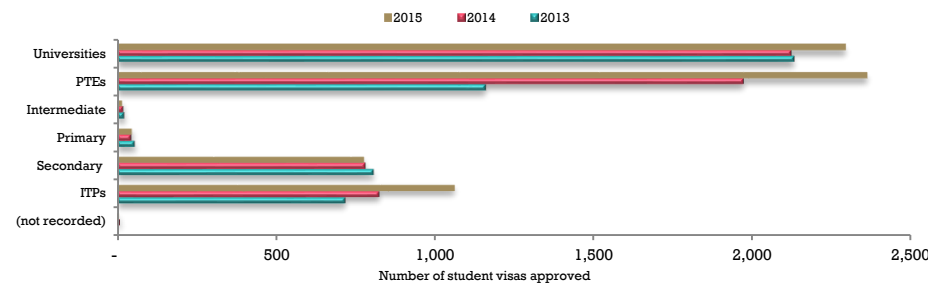
YTD top five market shifts (TSVs)



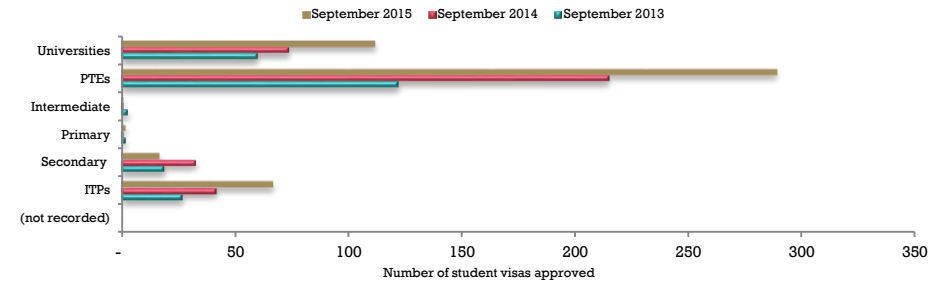
September top five market shifts (TSVs)



Canterbury: Total student visas issued by sector, YTD



Canterbury: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

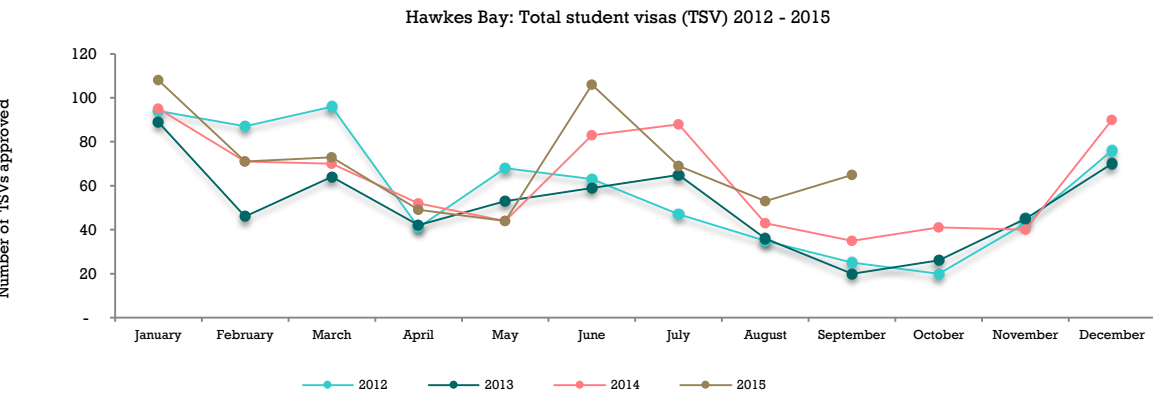
MONTH		
Country	Change (percentage)	Change (number)
India	↑ 41%	33
Philippines	↑ 725%	29
China	↑ 21%	14
Japan	↓ -62%	-8
Germany	↓ -86%	-6
Nepal	↓ -50%	-4

TOP FIVE MARKET SHIFTS (FSVs)

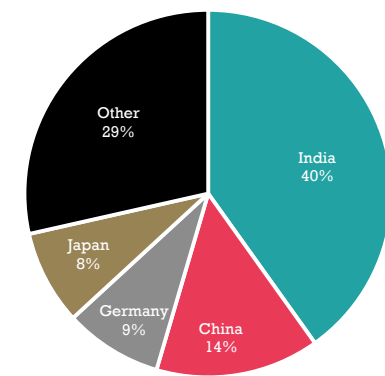
YTD		
Country	Change (percentage)	Change (number)
Philippines	↑ 847%	144
China	↑ 29%	137
USA	↑ 29%	58
Brazil	↓ -27%	-30
Thailand	↓ -28%	-30
Bangladesh	↓ -52%	-16

Takeaways:

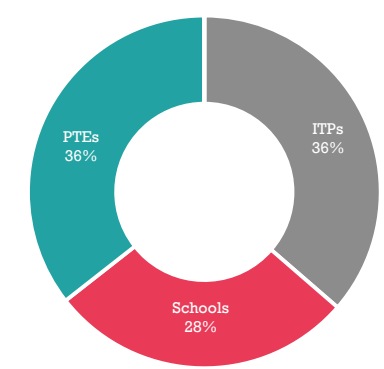
- Canterbury continues to grow TSVs strongly; up 14% (790) YTD, and 33% (122) during September. Canterbury comprises 9% of YTD TSVs nationwide.
- YTD, Chinese TSVs increased by 23% (429), and 28% (33) during September. India grew 19% (215) YTD and 43% (48) during September, and the Philippines grew 452% (149) YTD and 580% (29) during September. Together, these three nationalities have driven 100% (793) of YTD growth, and 90% (110) of growth during September.



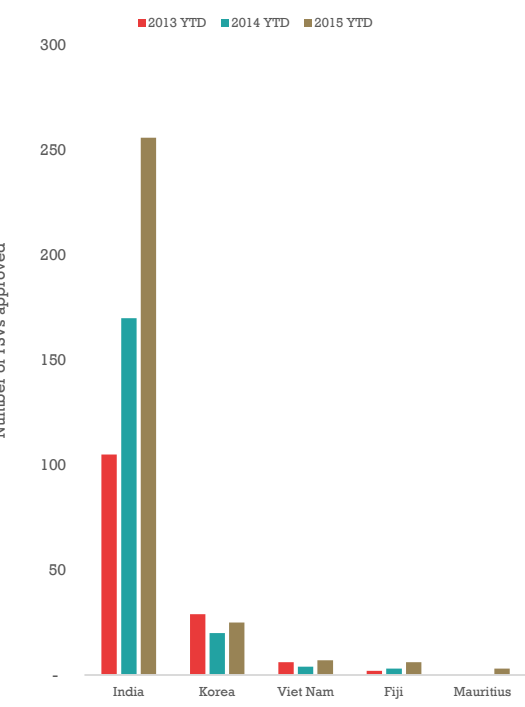
YTD 2015 country breakdown of TSVs



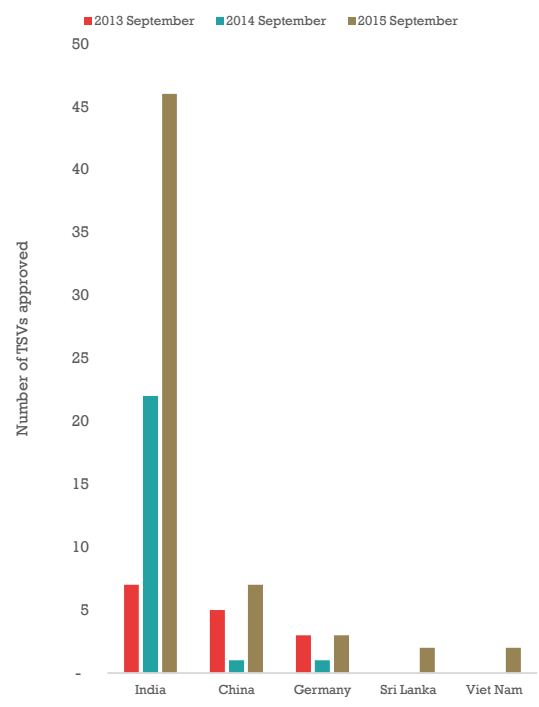
YTD 2015 sector breakdown of TSVs



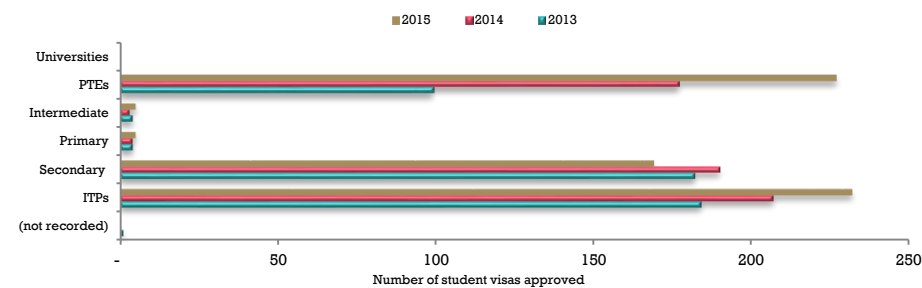
YTD top five market shifts (TSVs)



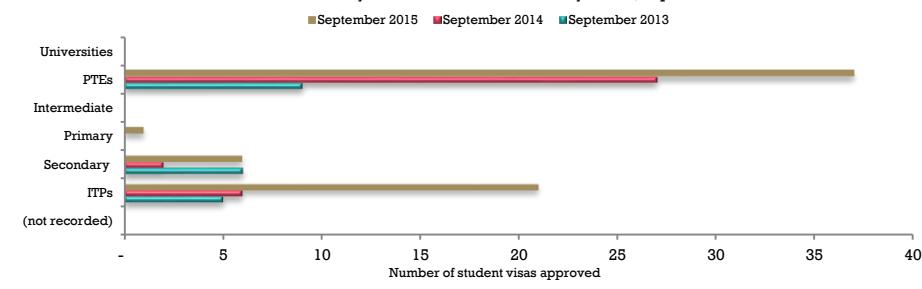
September top five market shifts (TSVs)



Hawkes Bay: Total student visas issued by sector, YTD



Hawkes Bay: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
India	77%	10
Sri Lanka	NA	2
Viet Nam	NA	2
Korea	-100%	-2
Japan	-100%	-1
Saudi Arabia	-100%	-1
YTD		
Country	Change (percentage)	Change (number)
India	43%	45
Viet Nam	200%	4
Mauritius	NA	3
Brazil	-70%	-14
Germany	-16%	-9
Thailand	-38%	-6

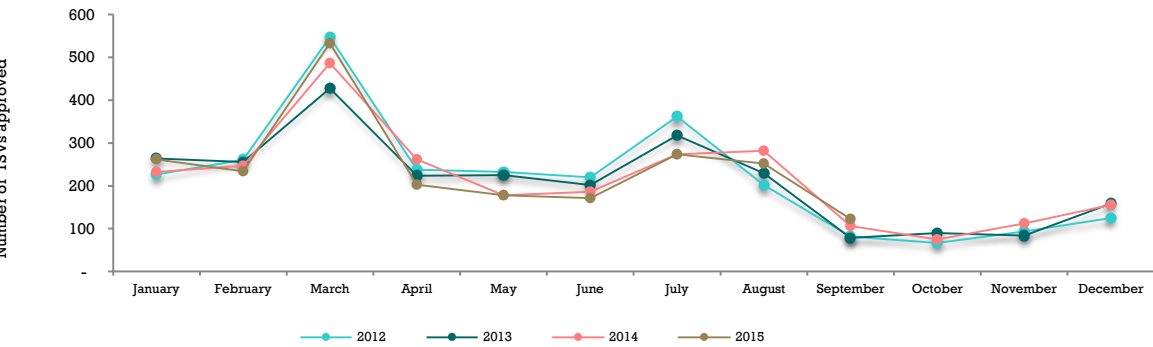
Takeaways:

- The Hawke's Bay continues to grow TSVs. On a YTD basis Hawke's Bay has gained 10% (57), while increasing 86% (30) during September.
- India has generated the majority of TSV growth, both YTD and during September. India gained 51% (86) YTD, and 109% (24) during September.
- Hawke's Bay has also experienced some declining markets. In FSVs, Brazil has declined by 70% (-14), Germany by 16% (-9), and Thailand by 38% (-6).

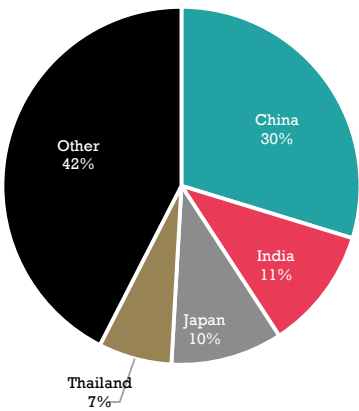
September RSV	September FSV	September TSV
<div>↑ 29 49%</div>	<div>↓ -12 -26%</div>	<div>↑ 17 16%</div>

YTD RSV	YTD FSV	YTD TSV
<div>↓ -36 -3%</div>	<div>↑ 11 1%</div>	<div>↓ -25 -1%</div>

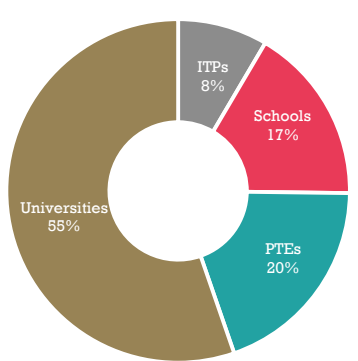
Manawatu-Wanganui: Total student visas (TSV) 2012 - 2015



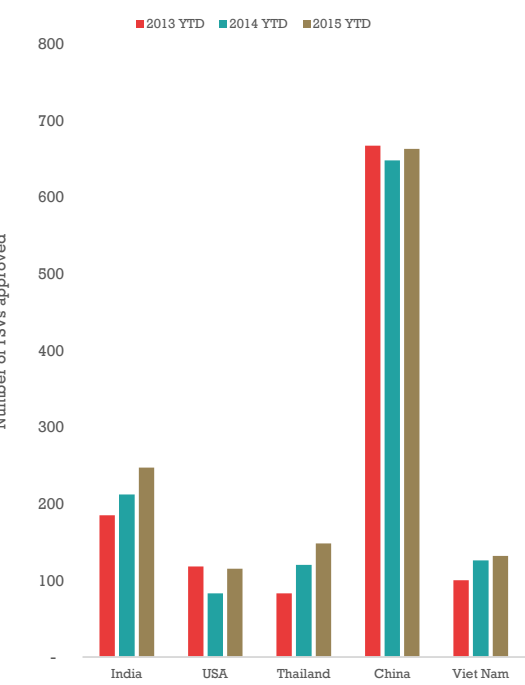
YTD 2015 country breakdown of TSVs



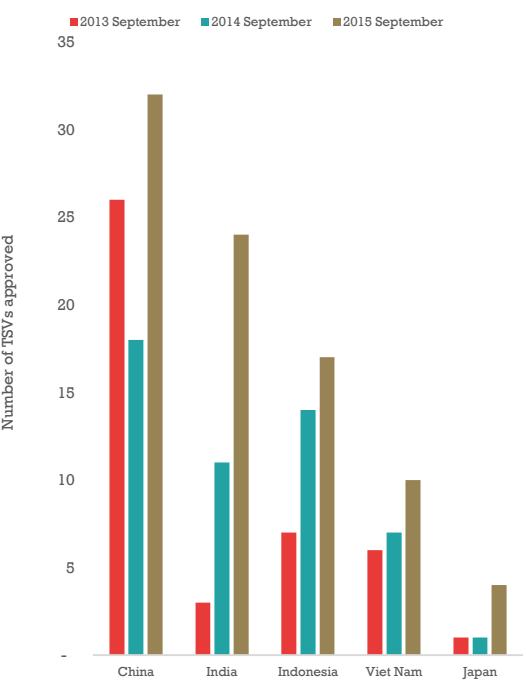
YTD 2015 sector breakdown of TSVs



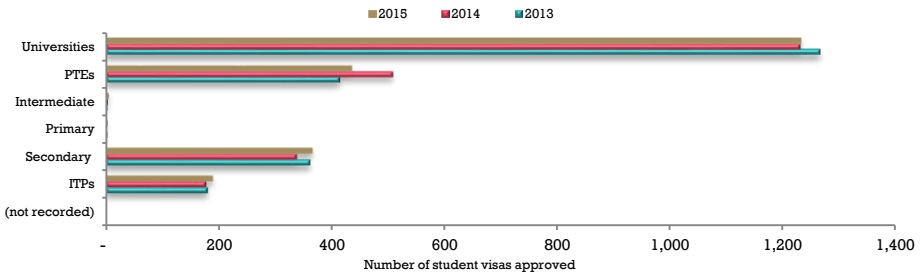
YTD top five market shifts (TSVs)



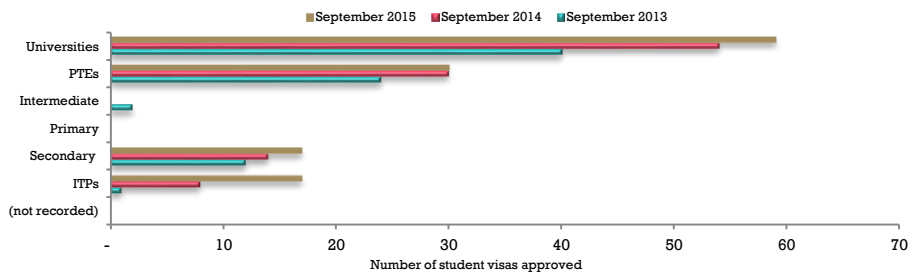
September top five market shifts (TSVs)



Manawatu-Wanganui: Total student visas issued by sector, YTD



Manawatu-Wanganui: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
India	↑ 56%	5
China	↑ 57%	4
USA	NA	2
Indonesia	↓ -100%	-6
Saudi Arabia	↓ -100%	-5
Hong Kong	↓ -100%	-4

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
USA	↑ 70%	35
India	↑ 22%	27
Thailand	↑ 34%	20
Indonesia	↓ -75%	-27
Japan	↓ -22%	-25
Papua New Guinea	↓ -53%	-8

Takeaways:

- The Manawatu region has been flat YTD. TSVs are down 1% (-25), but gained 16% (17) during September, driven by an increase in RSVs. Manawatu-Wanganui comprises 3% of YTD TSVs nationwide.
- YTD growth in key markets has been spread between India, up 17% (35), the USA, up 39% (32), and Thailand, up 23% (28).

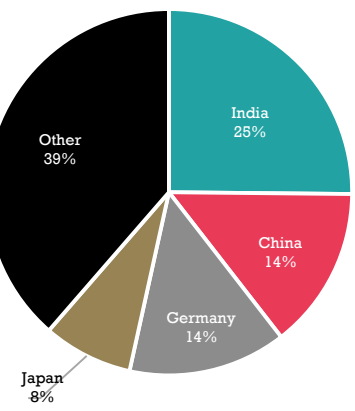
September RSV	September FSV	September TSV
<div>↑</div> 20133%	<div>↓</div> -12-24%	<div>↑</div> 812%

YTD RSV	YTD FSV	YTD TSV
<div>↑</div> 7137%	<div>↑</div> 10023%	<div>↑</div> 17127%

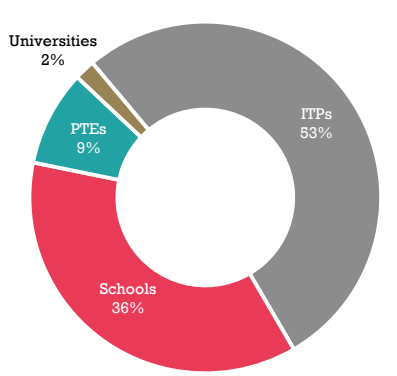
Nelson: Total student visas (TSV) 2012 - 2015



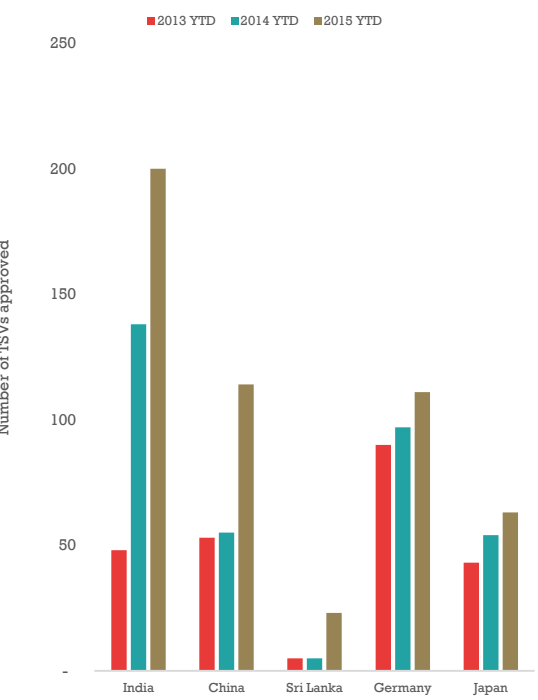
YTD 2015 country breakdown of TSVs



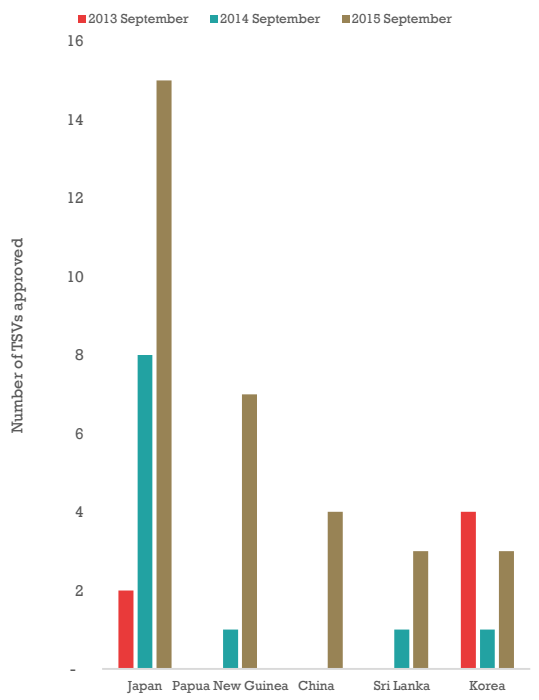
YTD 2015 sector breakdown of TSVs



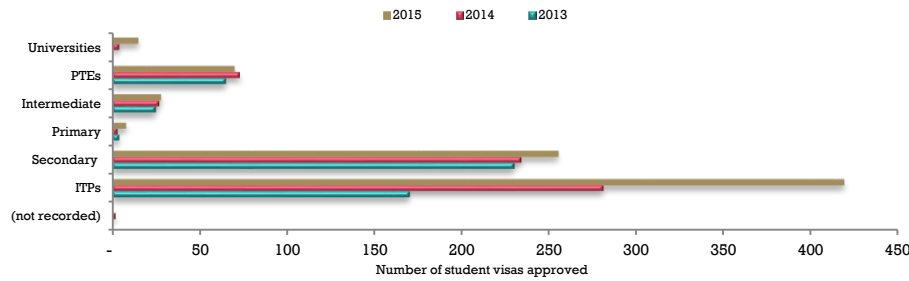
YTD top five market shifts (TSVs)



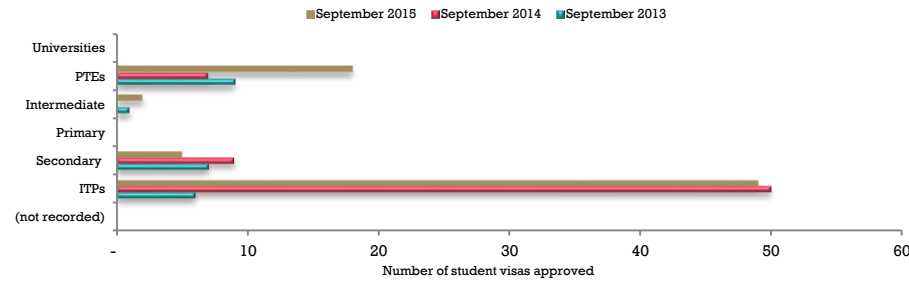
September top five market shifts (TSVs)



Nelson: Total student visas issued by sector, YTD



Nelson: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Papua New Guinea	NA	3
Korea	NA	3
Sri Lanka	↑ 200%	2
India	↓ -65%	-22
Germany	↓ -43%	-3
Switzerland	↓ -67%	-2

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
China	↑ 128%	37
India	↑ 30%	36
Sri Lanka	↑ 2000%	20
Nepal	↓ -52%	-13
Brazil	↓ -48%	-10
Norway	↓ -67%	-10

Takeaways:

- Nelson has grown strongly YTD. TSVs are up 27% (171), driven by gains in both RSVs and in FSVs. Nelson also experienced growth in September growing by 12% (8) in TSVs
- YTD TSV growth in key markets has been from India, up 45% (62), and China, up 107% (59). FSV declines have come from Nepal, Brazil, and Norway.

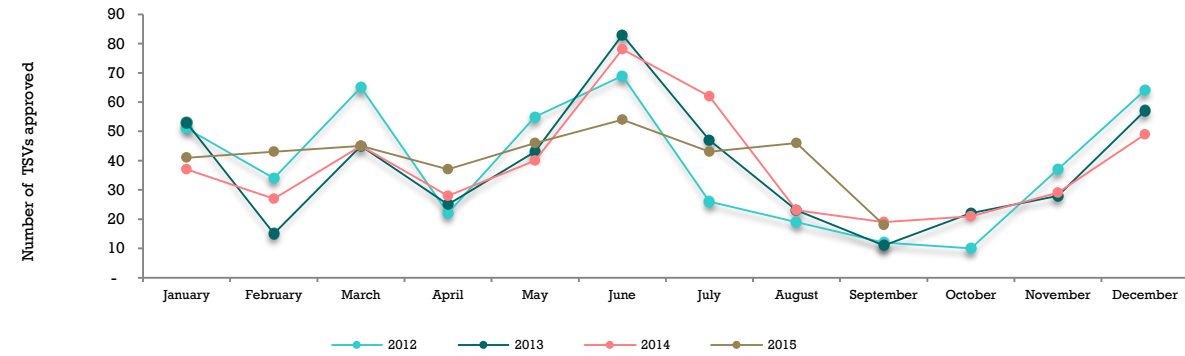
Northland:



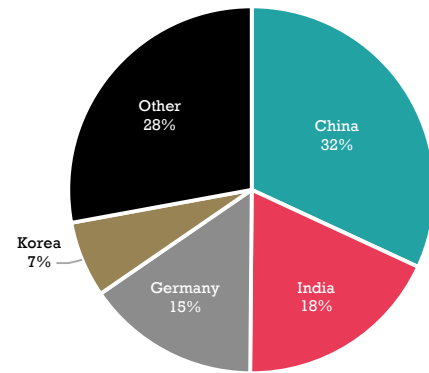
September RSV	September FSV	September TSV
↓ -3	↑ 2	↓ -1
-60%	14%	-5%

YTD RSV	YTD FSV	YTD TSV
↑ 62	↓ -48	↑ 14
66%	-18%	4%

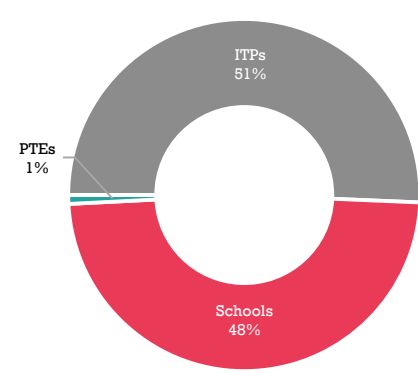
Northland: Total student visas (TSV) 2012 - 2015



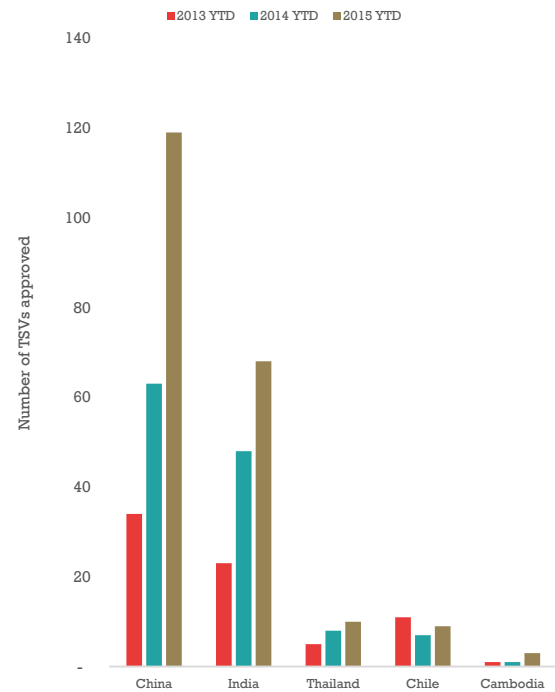
YTD 2015 country breakdown of TSVs



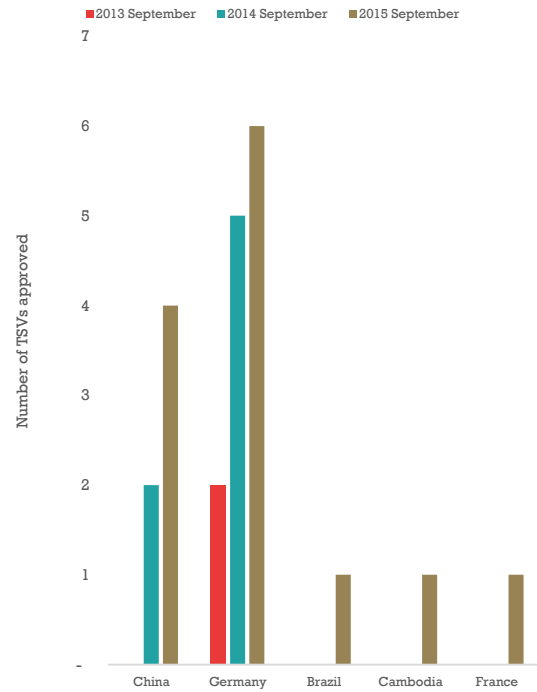
YTD 2015 sector breakdown of TSVs



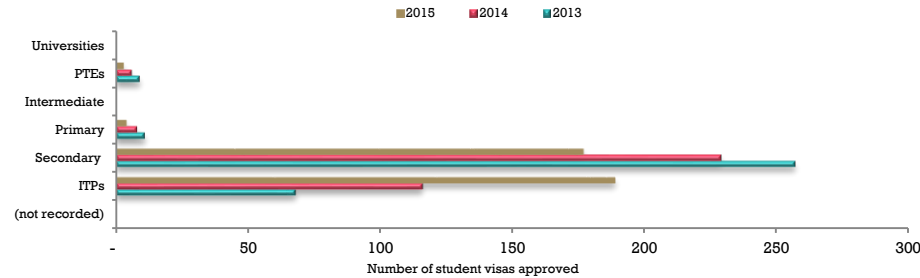
YTD top five market shifts (TSVs)



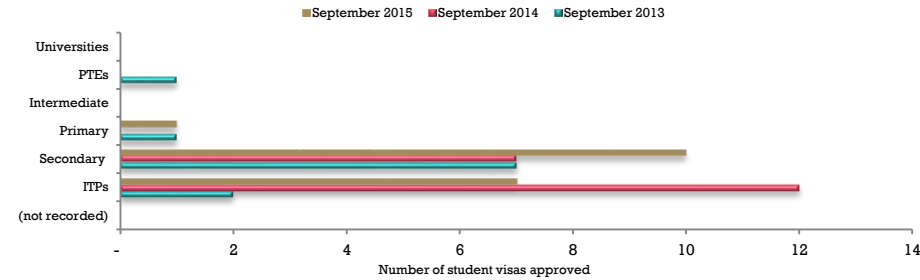
September top five market shifts (TSVs)



Northland: Total student visas issued by sector, YTD



Northland: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Germany	↑ 50%	2
China	↑ 100%	1
Brazil	NA	1
India	↓ -63%	-5
Austria	↓ -100%	-1
Malaysia	NA	0

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
China	↑ 12%	5
Korea	↑ 83%	5
Chile	↑ 75%	3
Brazil	↓ -67%	-22
Germany	↓ -28%	-20
India	↓ -13%	-5

Takeaways:

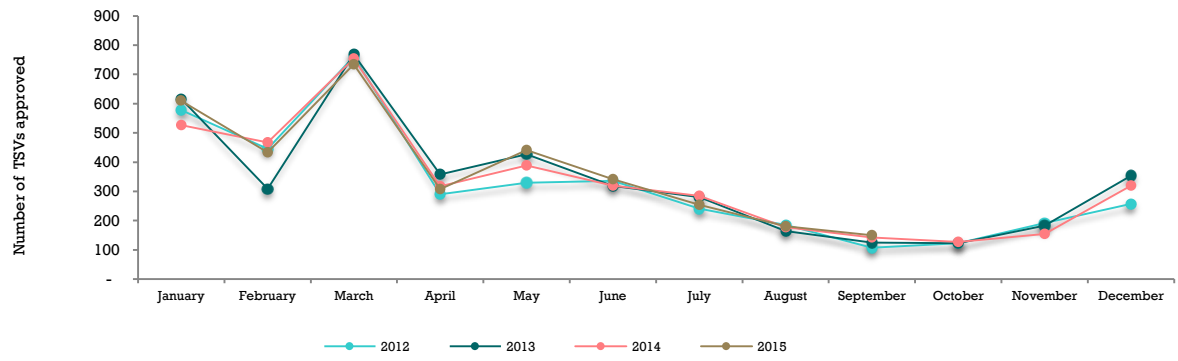
- Northland has been flat in TSVs YTD. This was driven by offsetting results in RSVs, which gained 66% (62), and FSVs, which declined 18% (48).
- YTD, China has gained 89% (56) in TSVs while India increased by 42% (20). Major declines in YTD FSVs came from Brazil, down 67% (-22), Germany, down 28% (-20), and India, down 13% (-5).



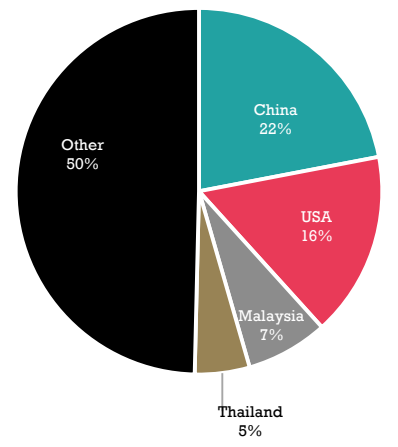
September RSV	September FSV	September TSV
↑ 14 26%	↓ -6 -7%	↑ 8 6%

YTD RSV	YTD FSV	YTD TSV
↓ -88 -5%	↑ 163 11%	↑ 75 2%

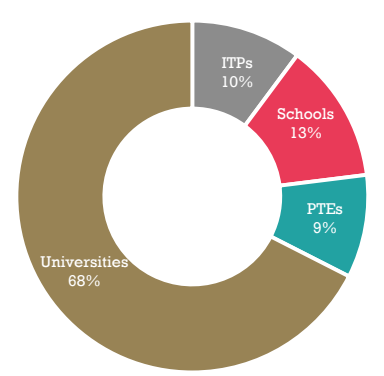
Otago: Total student visas (TSV) 2012 - 2015



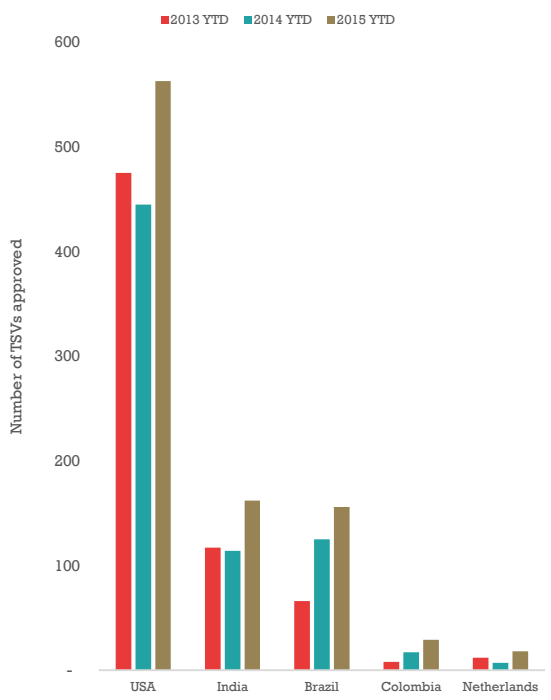
YTD 2015 country breakdown of TSVs



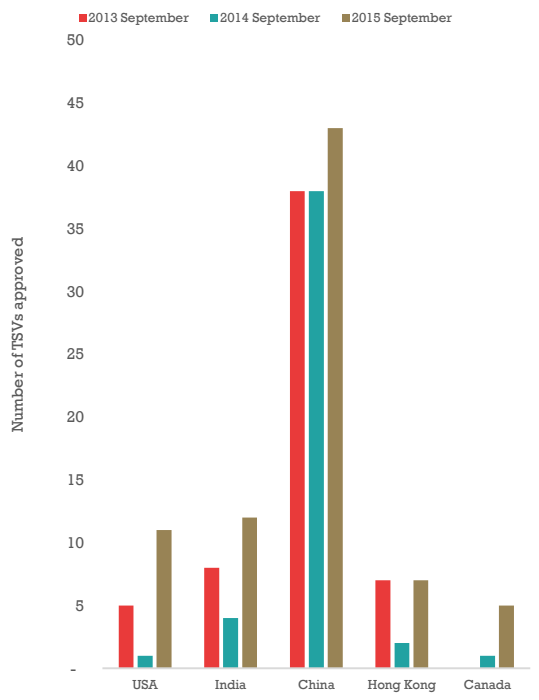
YTD 2015 sector breakdown of TSVs



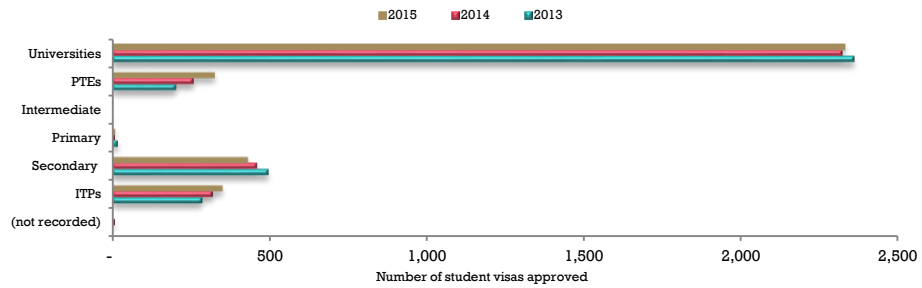
YTD top five market shifts (TSVs)



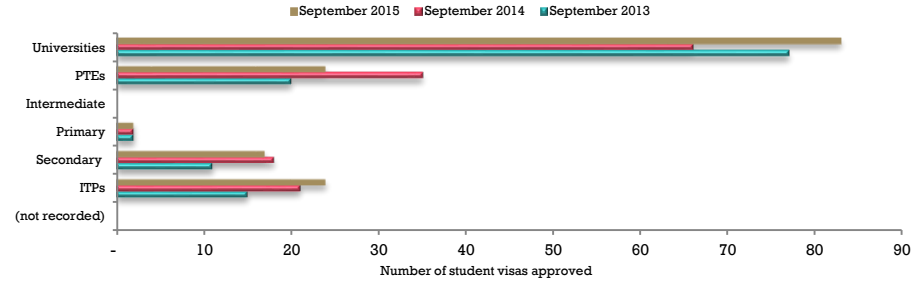
September top five market shifts (TSVs)



Otago: Total student visas issued by sector, YTD



Otago: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
India	↑ 300%	6
USA	NA	5
China	↑ 24%	4
Japan	↓ -80%	-8
Malaysia	↓ -100%	-6
Korea	↓ -71%	-5

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
USA	↑ 27%	108
India	↑ 71%	37
Brazil	↑ 22%	25
Thailand	↓ -36%	-35
Germany	↓ -20%	-23
Saudi Arabia	↓ -41%	-9

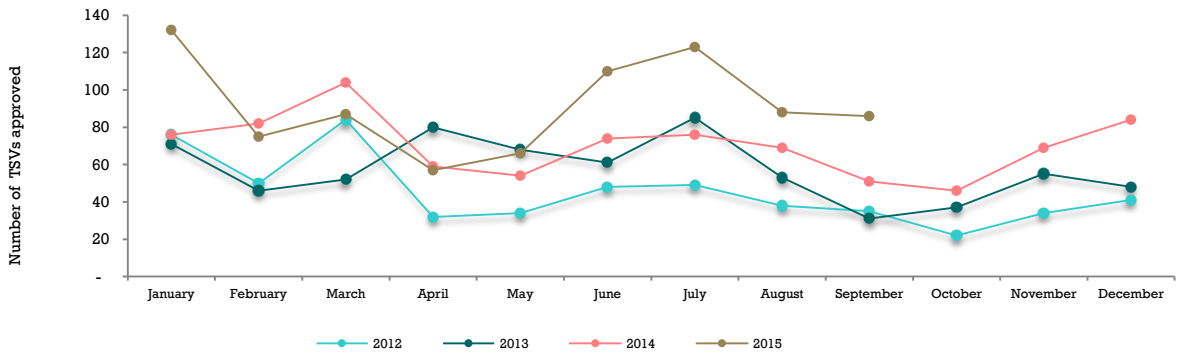
Takeaways:

- Otago has been flat YTD, with a 2% (75) gain in TSVs. This was a result of offsetting results between RSVs, down 5% (-88), and FSVs, up 11% (163).
- In YTD TSVs the USA gained 27% (118), and India increased 42% (48). Saudi Arabia declined 43% (-73) and Germany decreased 18% (-25).

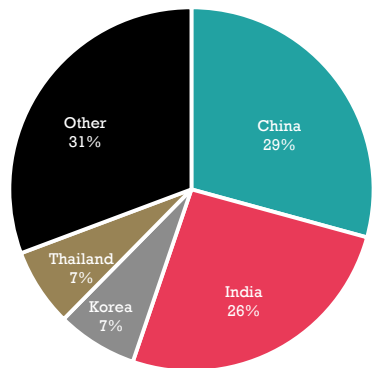
September RSV	September FSV	September TSV
622%↑	29121%↑	3569%↑

YTD RSV	YTD FSV	YTD TSV
227%↑	15750%↑	17928%↑

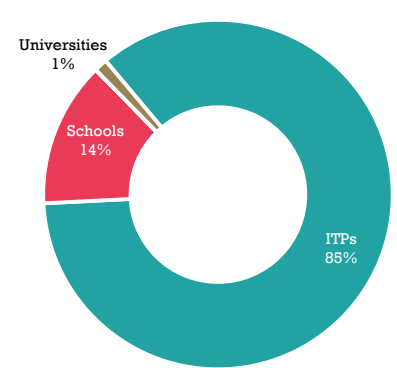
Southland: Total student visas (TSV) 2012 - 2015



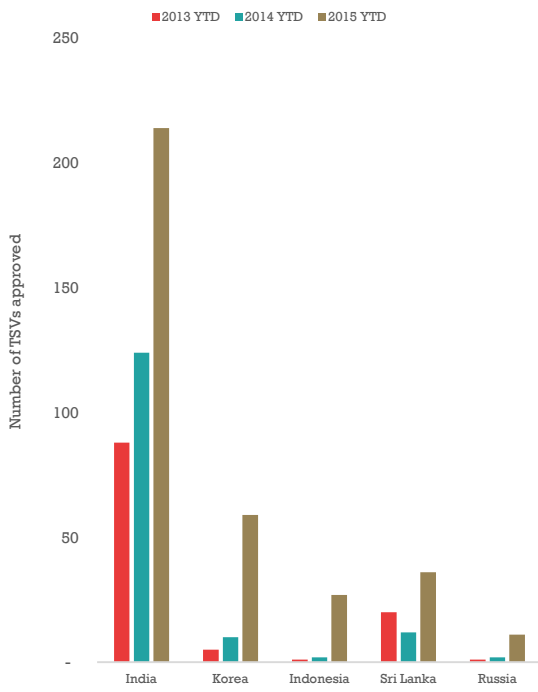
YTD 2015 country breakdown of TSVs



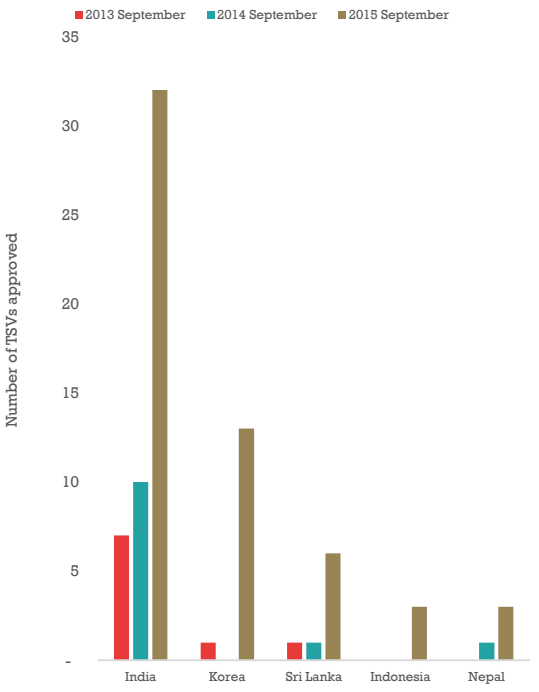
YTD 2015 sector breakdown of TSVs



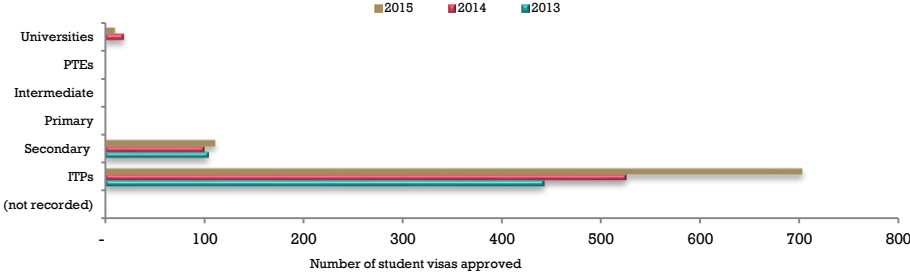
YTD top five market shifts (TSVs)



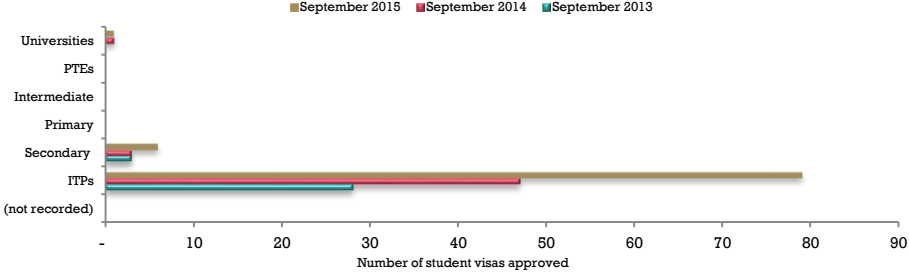
September top five market shifts (TSVs)



Southland: Total student visas issued by sector, YTD



Southland: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
India	267%↑	16
Korea	NA	7
China	200%↑	6
Viet Nam	-80%↓	-4
France	-67%↓	-2
Philippines	-50%↓	-1

TOP FIVE MARKET SHIFTS (FSVS)

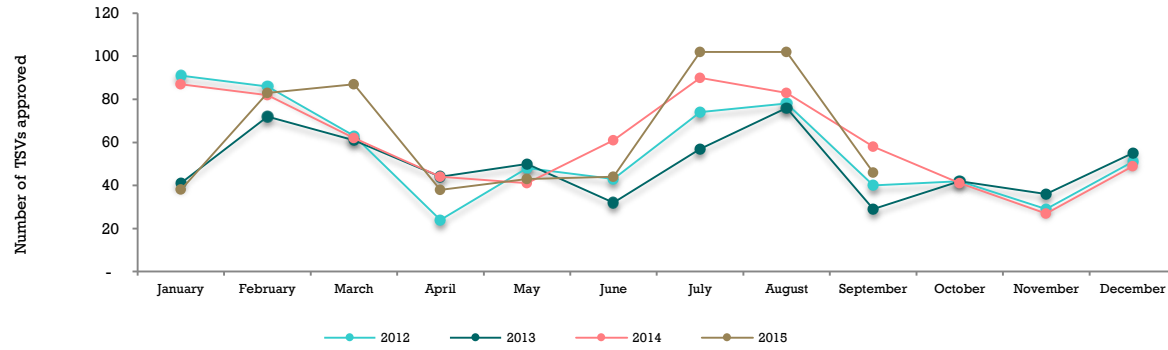
YTD		
Country	Change (percentage)	Change (number)
India	111%↑	83
Korea	825%↑	33
Indonesia	2500%↑	25
China	-16%↓	-13
Thailand	-26%↓	-8
Germany	-18%↓	-5

- Takeaways:
- Southland has shown strong growth YTD in TSVs, up 28% (179), and 69% (35) during September.
 - The majority of growth has come from FSVs, which have gained 50% (157) YTD and 121% (29) in September.
 - India and Korea's growth has been particularly strong, together providing an additional 139 TSVs YTD and an additional 35 TSVs during September.

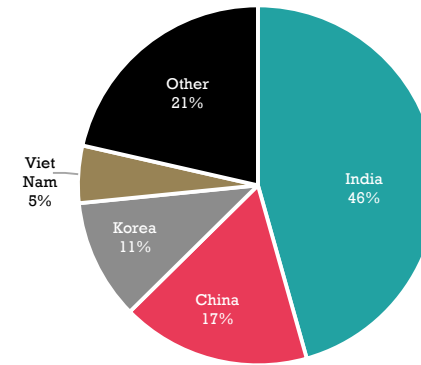
September RSV	September FSV	September TSV
0 0%	-12 -30%	-12 -21%

YTD RSV	YTD FSV	YTD TSV
63 19%	-88 -32%	-25 -4%

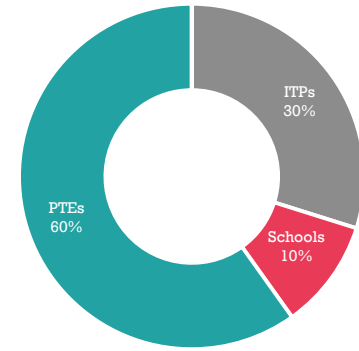
Taranaki: Total student visas (TSV) 2012 - 2015



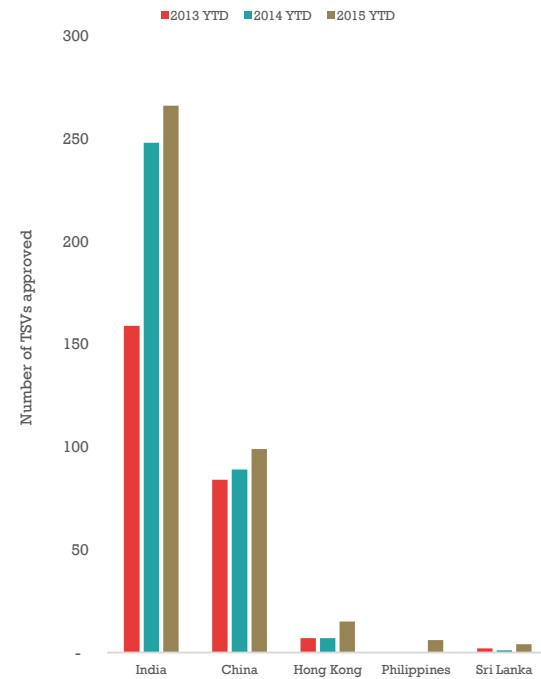
YTD 2015 country breakdown of TSVs



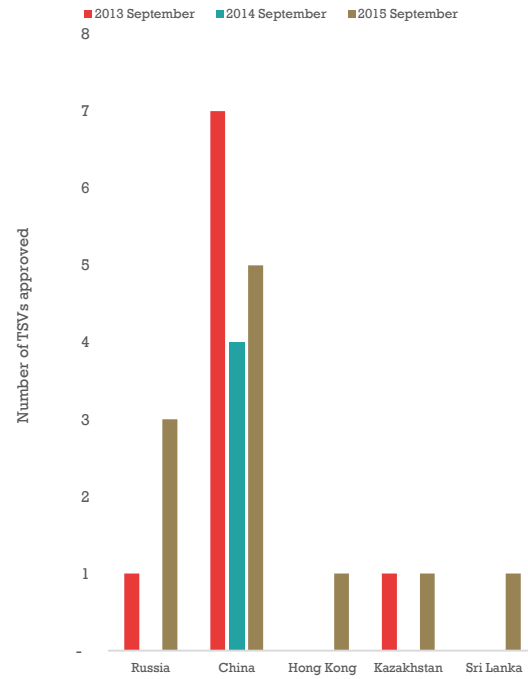
YTD 2015 sector breakdown of TSVs



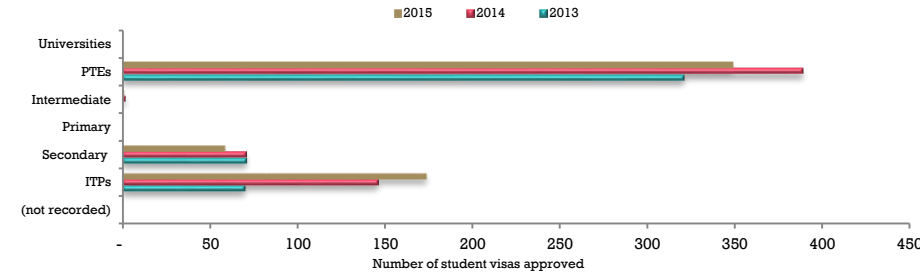
YTD top five market shifts (TSVs)



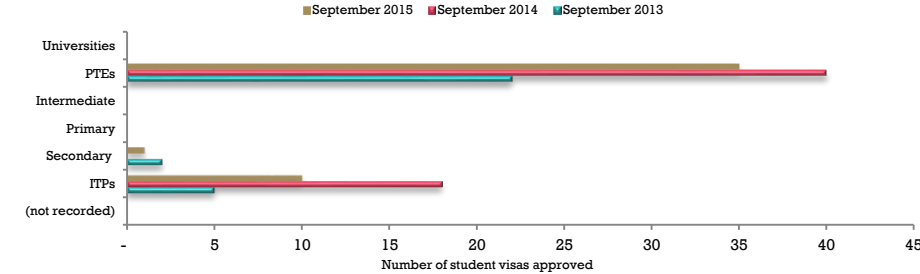
September top five market shifts (TSVs)



Taranaki: Total student visas issued by sector, YTD



Taranaki: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

	MONTH		
Country	Change (percentage)	Change (number)	
China	100%	2	
Russia	NA	2	
Kazakhstan	NA	1	
India	-45%	-15	
Nepal	-100%	-3	
Viet Nam	-100%	-2	

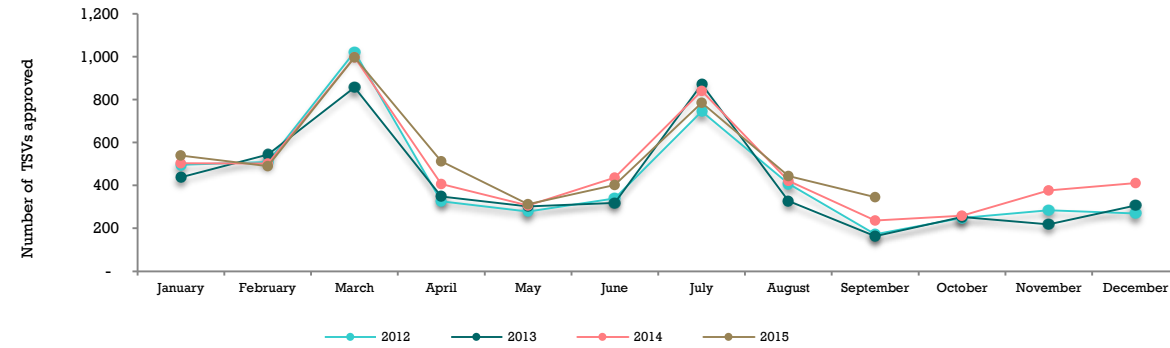
TOP FIVE MARKET SHIFTS (FSVs)

	YTD		
Country	Change (percentage)	Change (number)	
Germany	150%	6	
Philippines	NA	4	
Hong Kong	NA	3	
Korea	-91%	-39	
India	-24%	-35	
Viet Nam	-89%	-8	

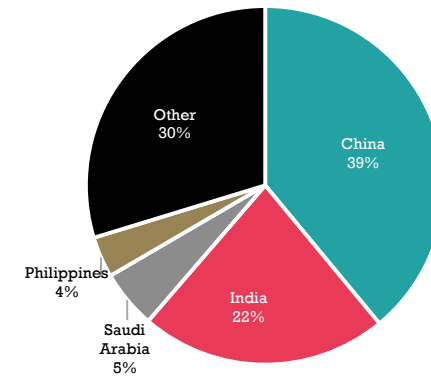
Takeaways:

- Taranaki has tracked relatively flat, down 4% (-25). September's saw a sharp decline with TSVs decreasing by 21% (-12).
- Korea and India have provided the largest declines in FSVs and TSVs YTD.

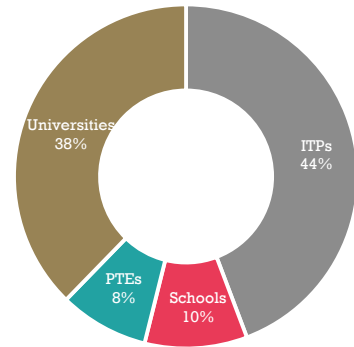
Waikato: Total student visas (TSV) 2012 - 2015



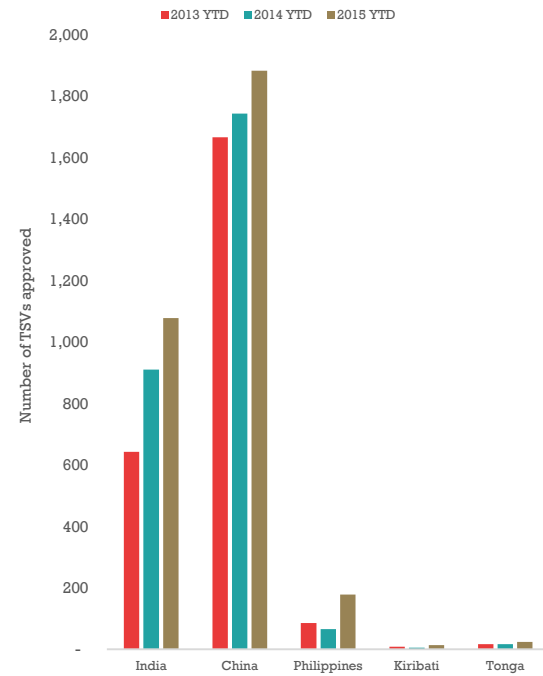
YTD 2015 country breakdown of TSVs



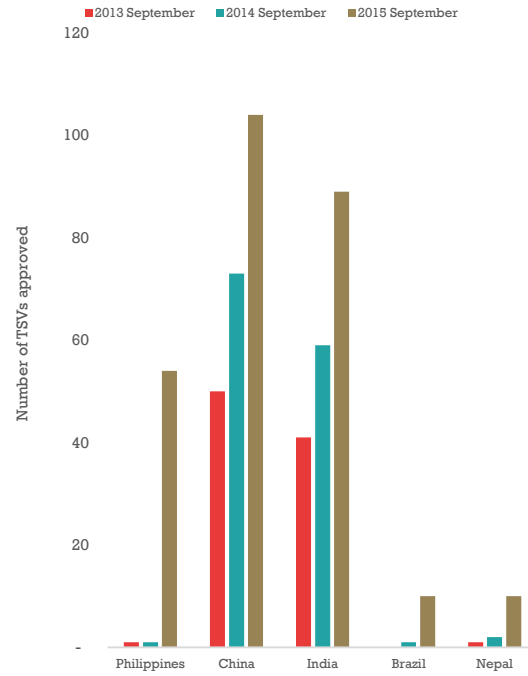
YTD 2015 sector breakdown of TSVs



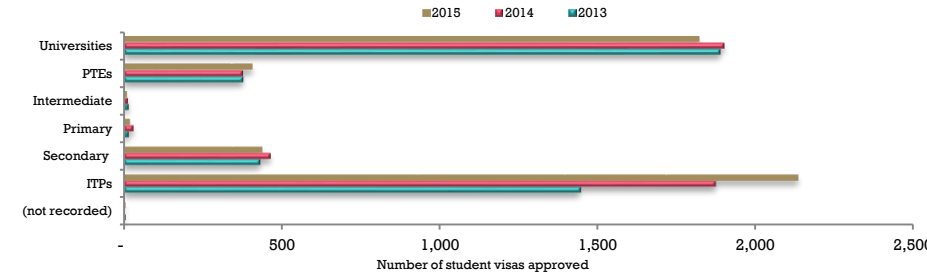
YTD top five market shifts (TSVs)



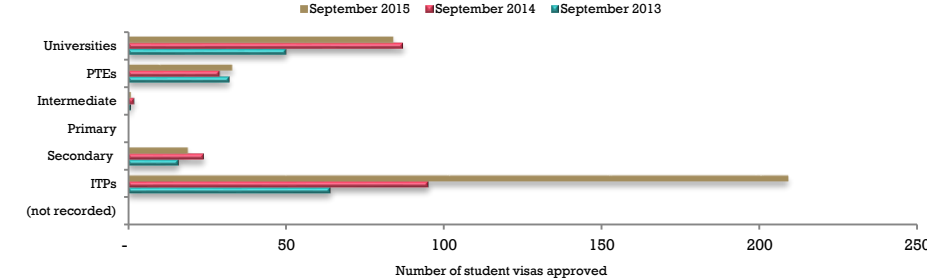
September top five market shifts (TSVs)



Waikato: Total student visas issued by sector, YTD



Waikato: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Philippines	↑ 5300%	53
India	↑ 59%	24
Brazil	↑ 800%	8
Great Britain	↓ -53%	-9
Korea	↓ -86%	-6
Japan	↓ -100%	-4
YTD		
Country	Change (percentage)	Change (number)
India	↑ 25%	135
Philippines	↑ 246%	113
China	↑ 13%	61
Saudi Arabia	↓ -65%	-55
Japan	↓ -40%	-49
Nepal	↓ -60%	-35

Takeaways:

- Waikato's TSVs are tracking flat YTD, up 4% (174). September results have been particularly strong, with a TSV gain of 69% (109), driven by positive results in both RSVs and FSVs. Waikato comprises 6.5% of TSVs YTD nationwide, down from 7.1% YTD 2014.
- The Philippines grew particularly strongly during September, gaining 5,300% (53). Major FSV decreases YTD came from Saudi Arabia, Japan, and Nepal.

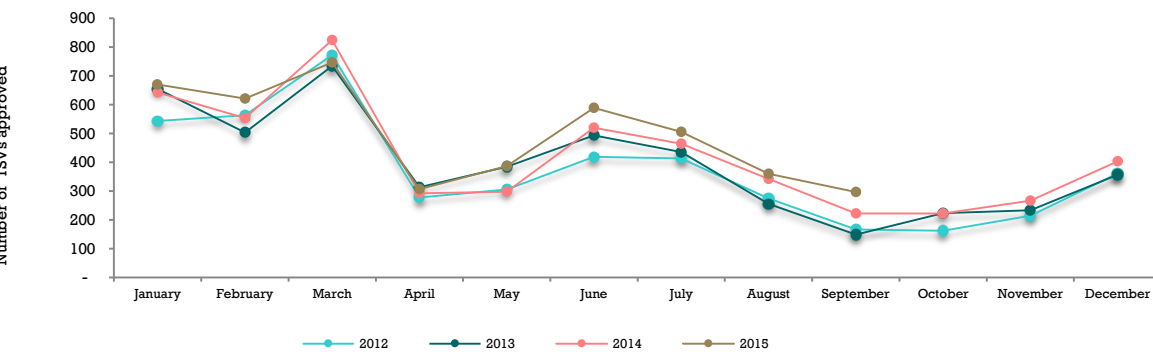
Wellington:



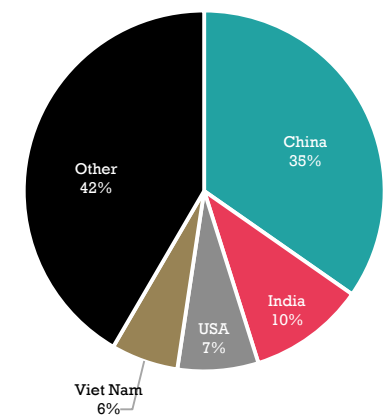
September RSV	September FSV	September TSV
56	77%	19
77%	13%	75
77%	13%	34%

YTD RSV	YTD FSV	YTD TSV
8	0%	317
0%	17%	325
0%	17%	8%

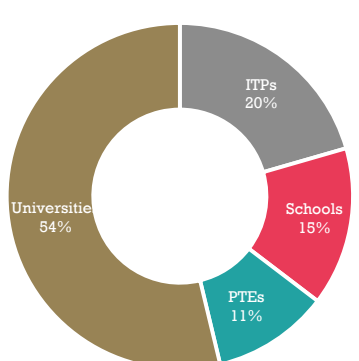
Wellington: Total student visas (TSV) 2012 - 2015



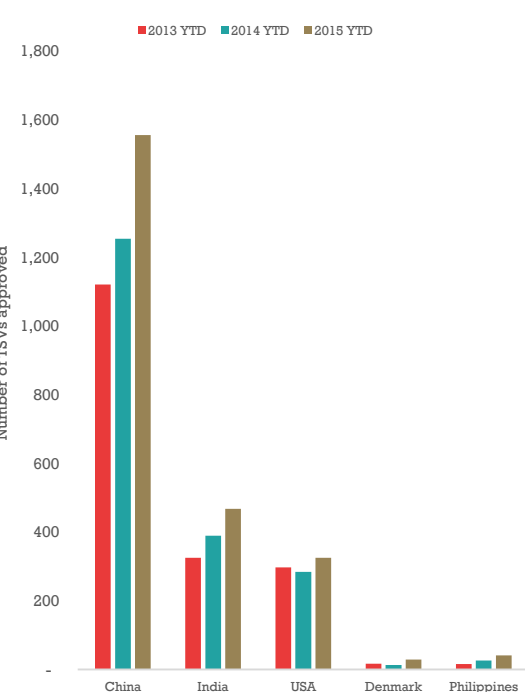
YTD 2015 country breakdown of TSVs



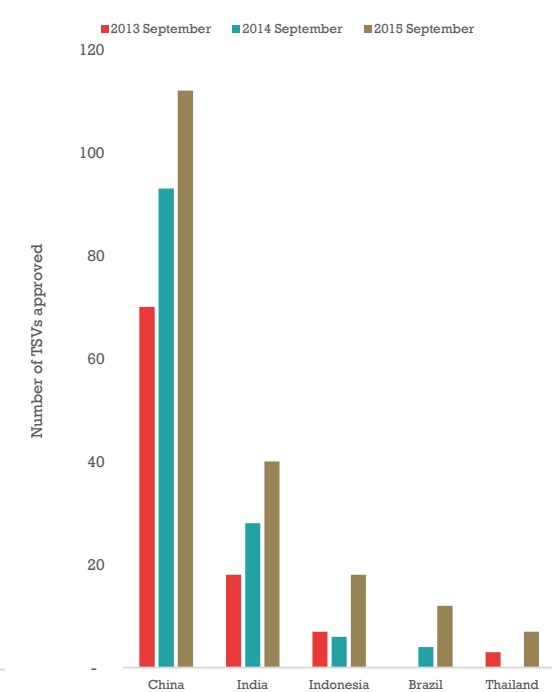
YTD 2015 sector breakdown of TSVs



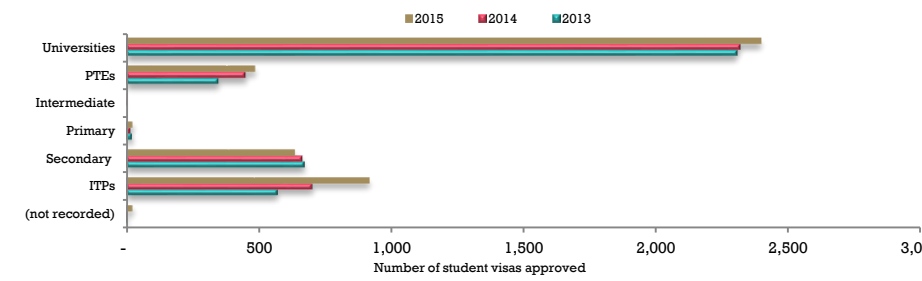
YTD top five market shifts (TSVs)



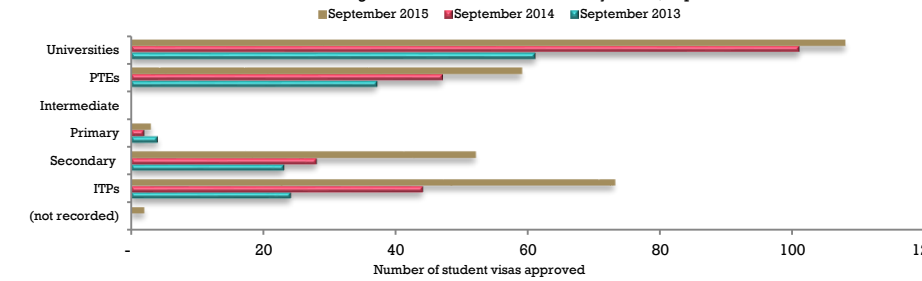
September top five market shifts (TSVs)



Wellington: Total student visas issued by sector, YTD



Wellington: Total student visas issued by sector, September



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Indonesia	200%	10
Brazil	175%	7
Viet Nam	200%	4
India	-25%	-6
Colombia	-80%	-4
Japan	-38%	-3
YTD		
Country	Change (percentage)	Change (number)
China	34%	119
India	27%	62
USA	21%	49
Brazil	-35%	-45
Germany	-26%	-31
France	-40%	-14

Takeaways:

- Wellington has shown steady growth in TSVs YTD, up 8% (325). September results have been very positive, with TSV gains of 34% (75), driven by positive results in both RSVs and FSVs. Wellington comprises 6.1% of TSVs YTD nationwide, down from 6.3% YTD 2014.
- YTD major FSV increases have come from China, India, and the USA.

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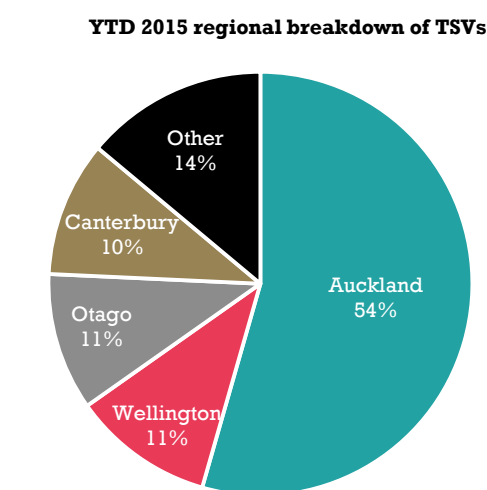
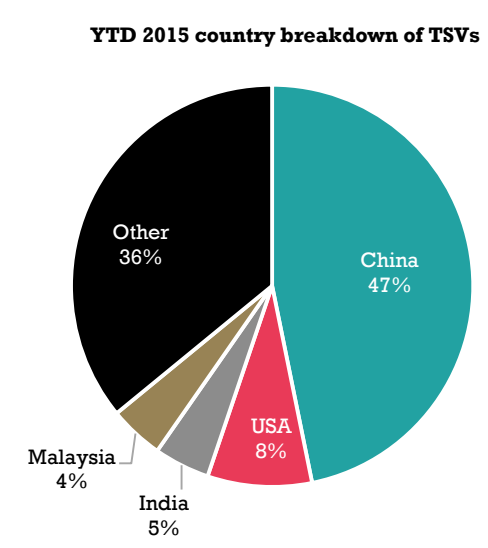
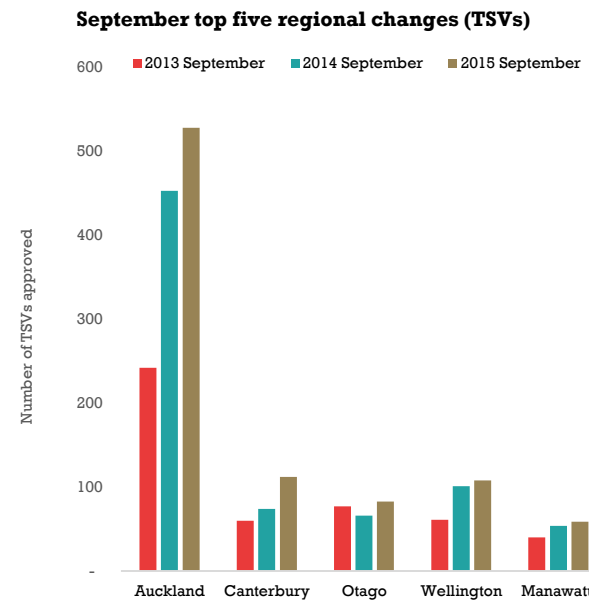
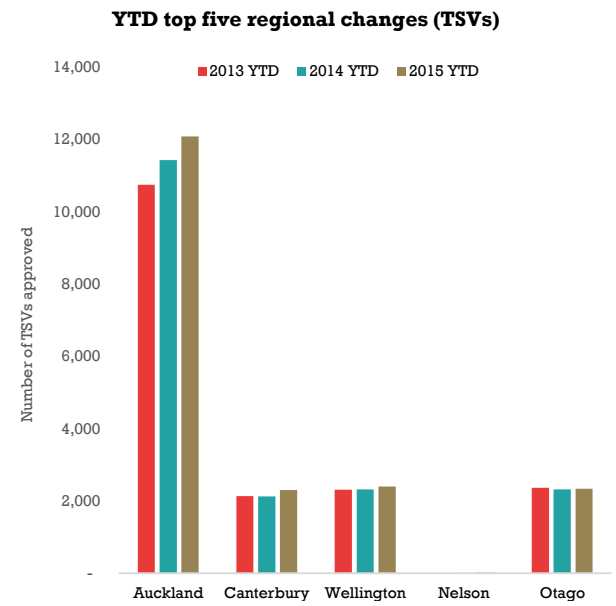
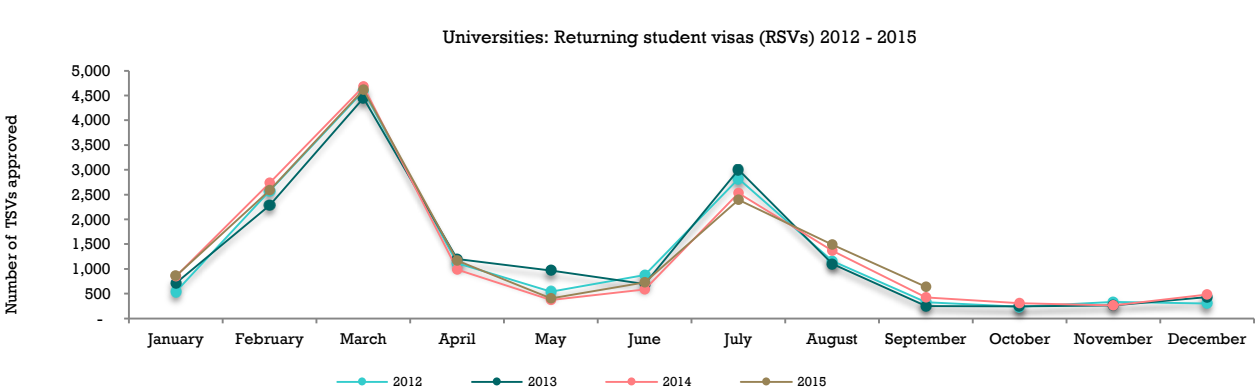
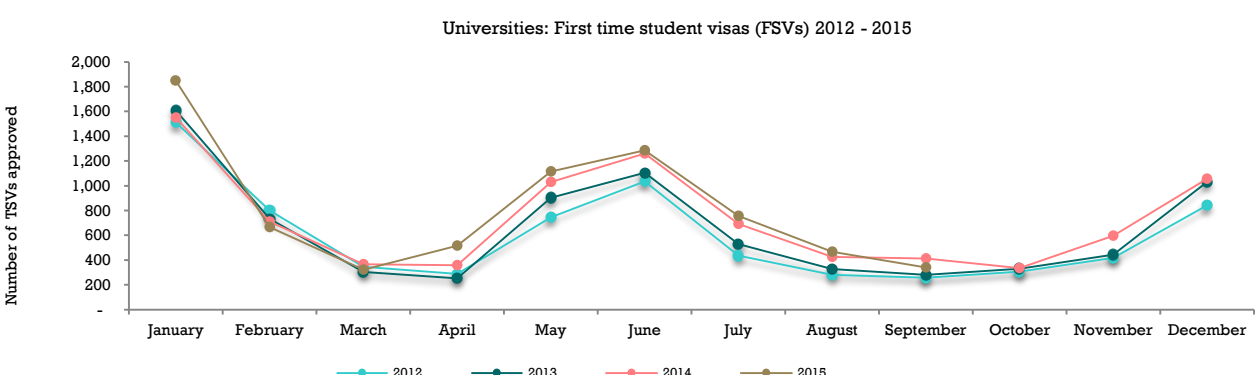
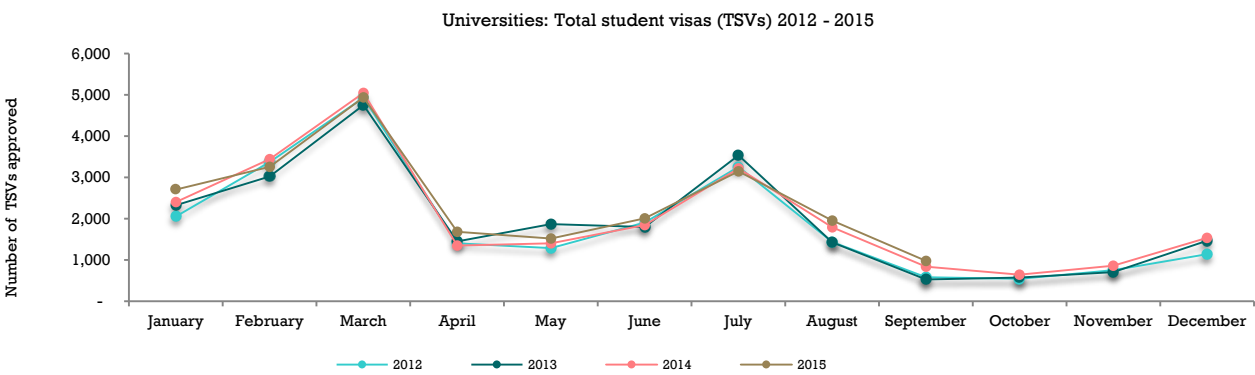
Overall: Sector overview



Universities:



September RSV	211	50%	September FSV	-72	-17%	September TSV	139	17%	YTD RSV	336	2%	YTD FSV	514	8%	YTD TSV	850	4%
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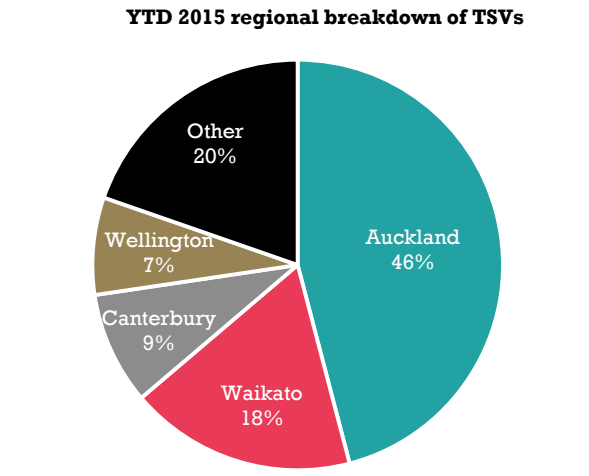
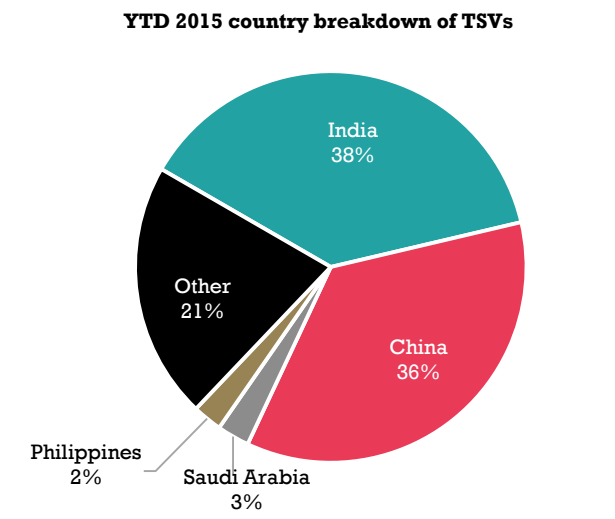
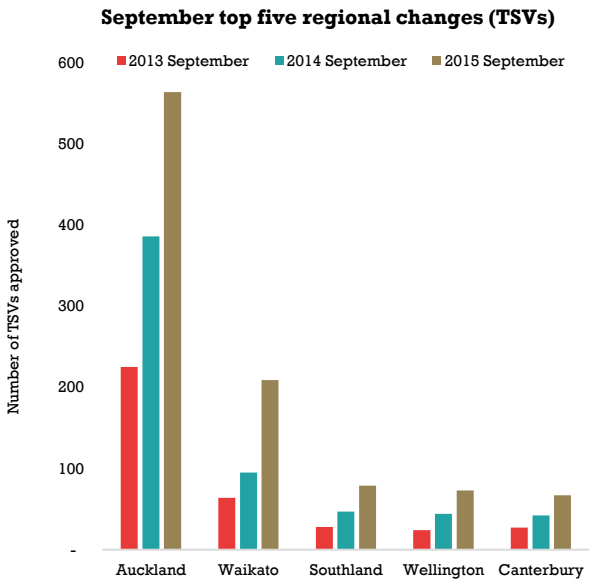
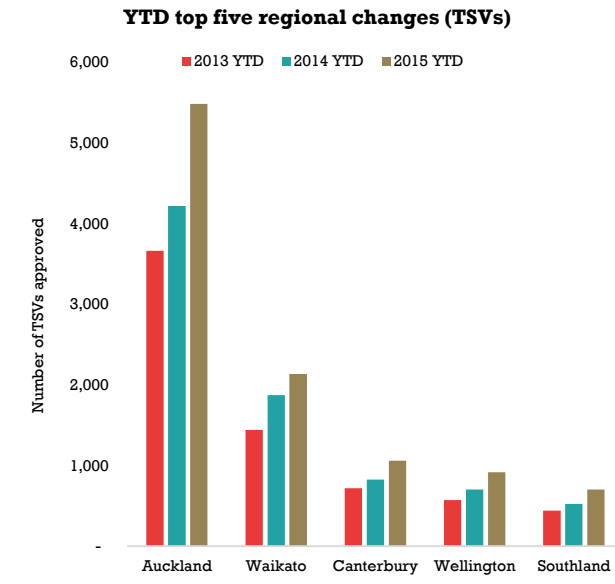
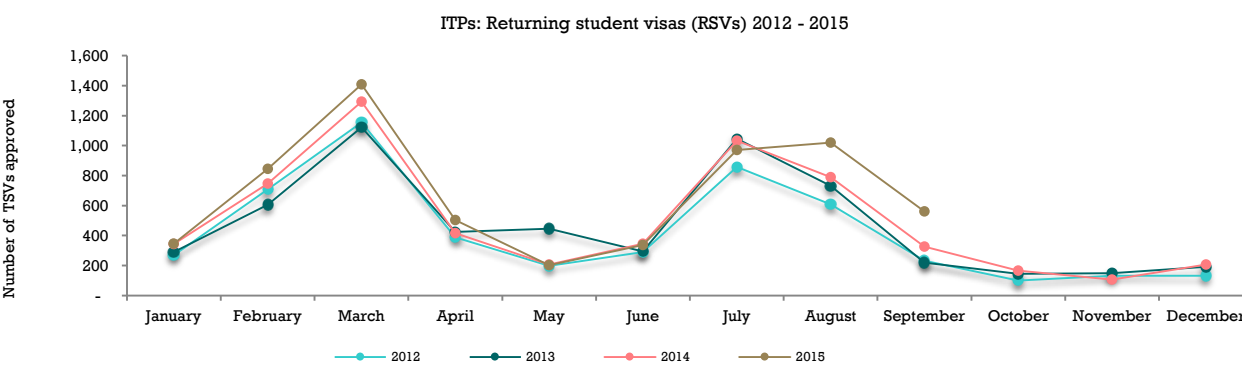
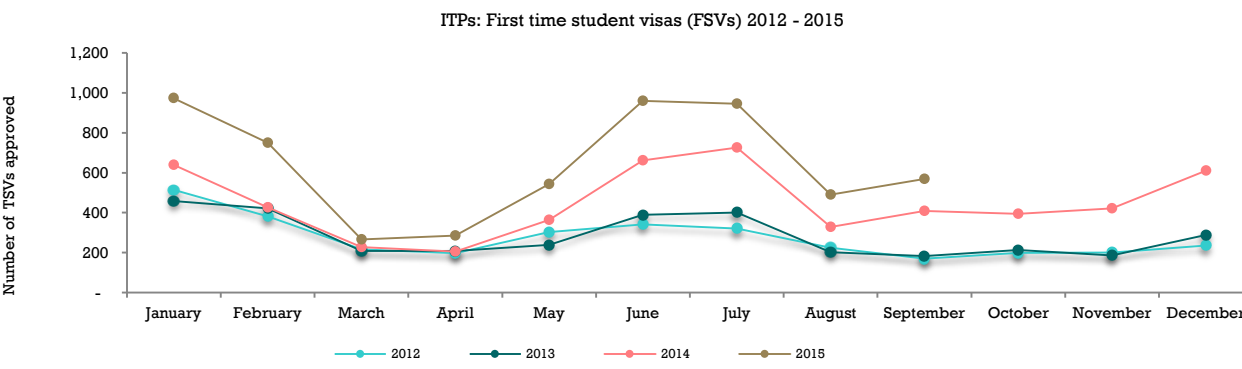
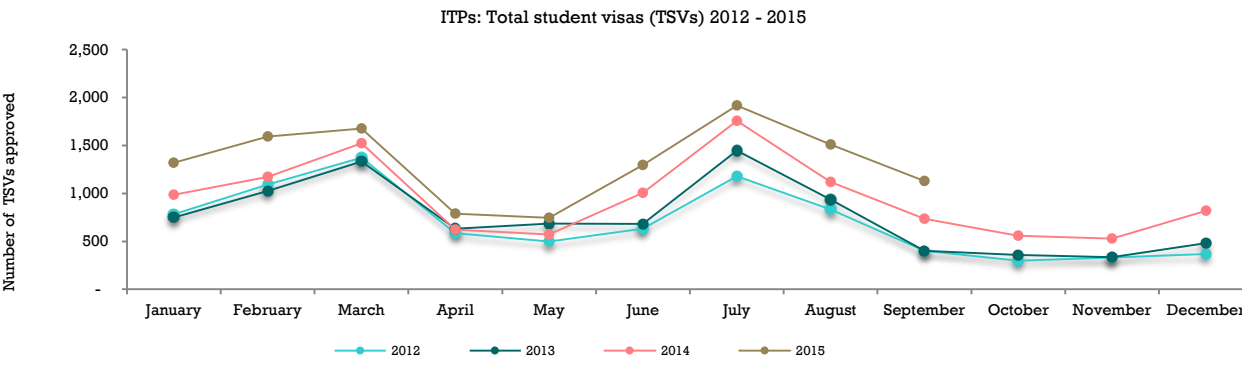


Takeaways:

- Universities have been flat during 2015. September results have been positive, with TSVs up 41% (1,141). Universities have received 30.1% of TSVs YTD, down from 32.4% during 2014.
- China provides 47% of university TSVs YTD, while the USA provides 8%.
- Note: Nelson appears in the graph 'YTD top five regional changes (TSVs)' because the University of Canterbury has a College of Education within the region.

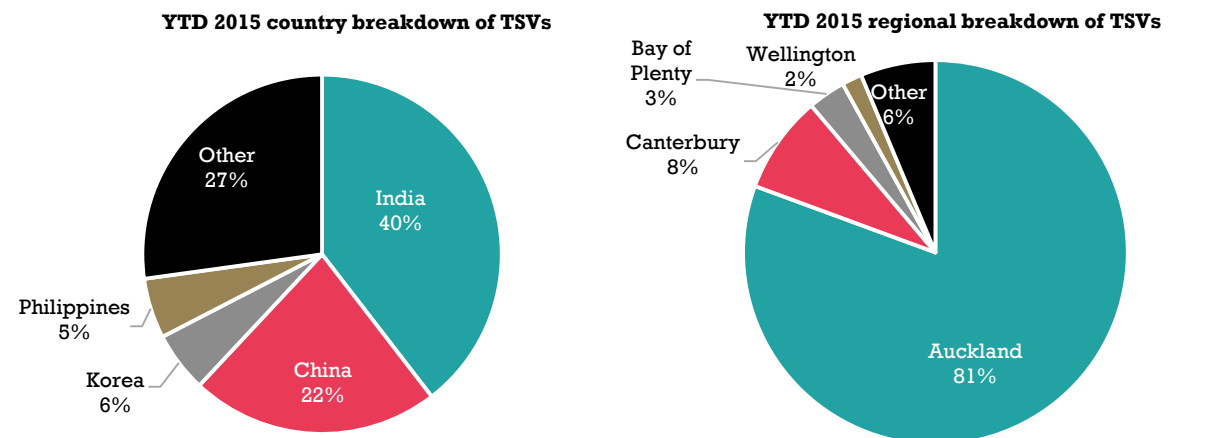
September RSV	September FSV	September TSV
↑ 234 72%	↑ 160 39%	↑ 394 54%

YTD RSV	YTD FSV	YTD TSV
↑ 693 11%	↑ 1,792 45%	↑ 2,485 26%

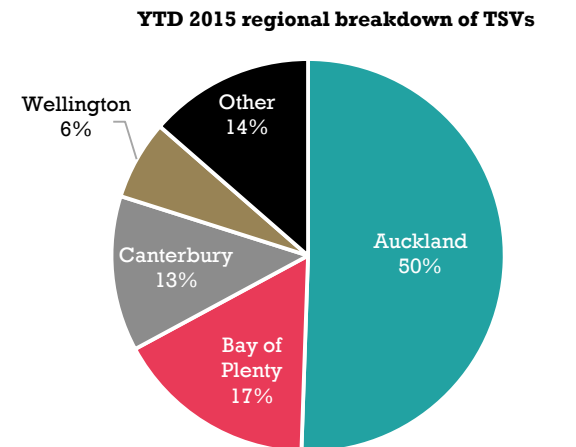
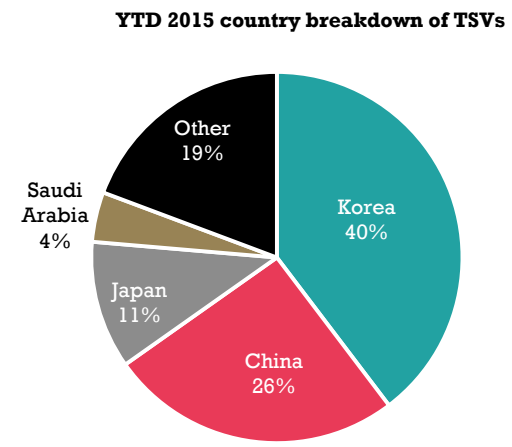
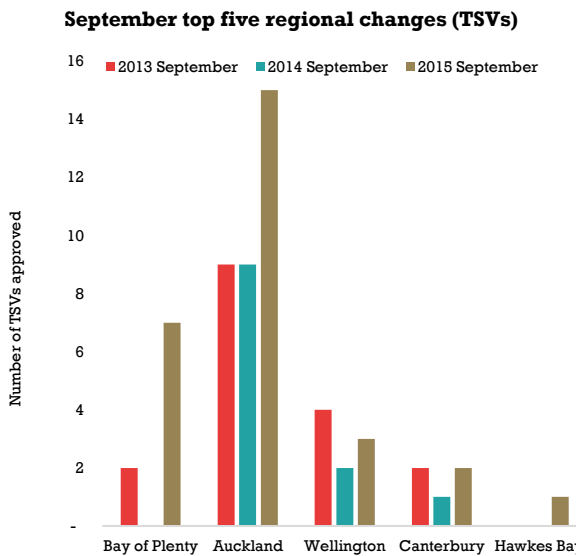
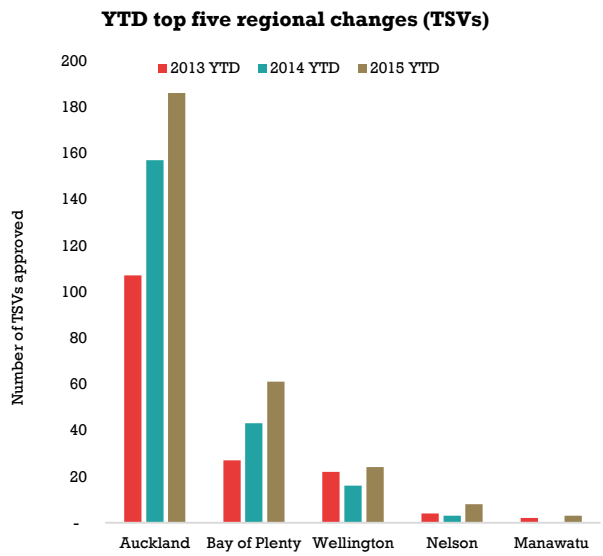
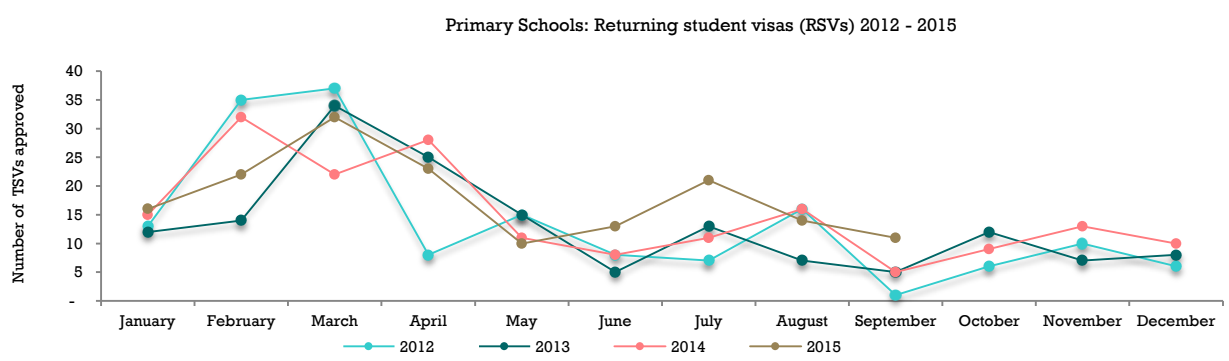
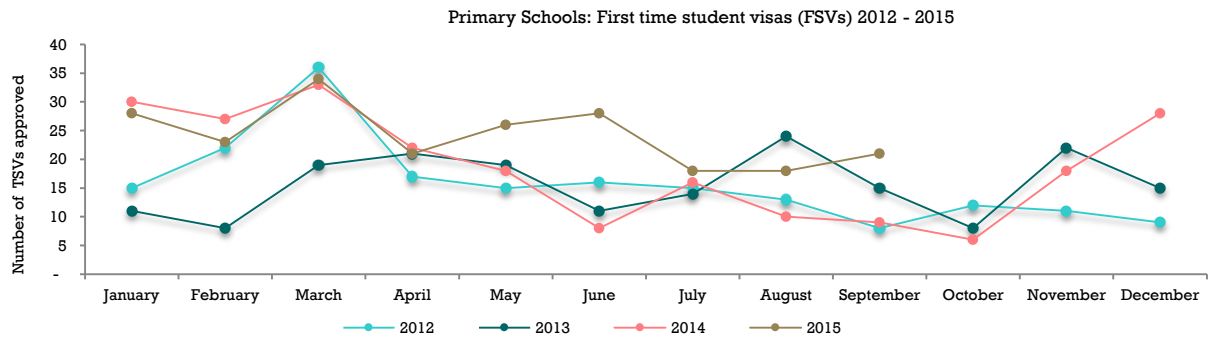
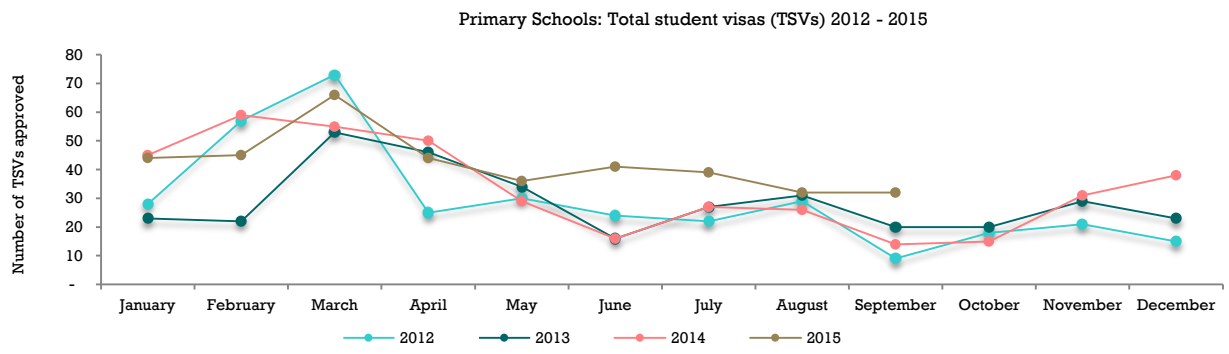


Takeaways:

- ITPs have grown particularly strongly YTD, up 26% (2,485). September results have also been strong, with TSVs up 54% (394), driven by growth in both RSVs and FSVs.
- The top four regions (Auckland, 46%; Waikato, 18%; Canterbury, 9%; and Wellington, 7%) together comprise 80% of YTD TSVs.

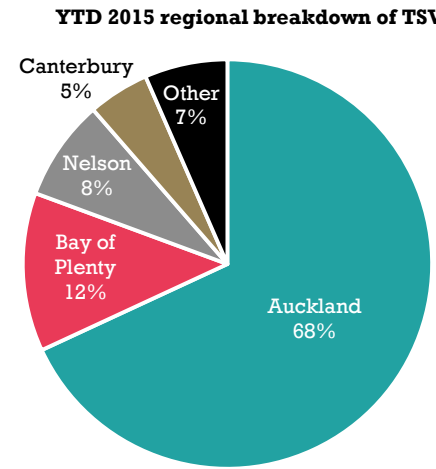
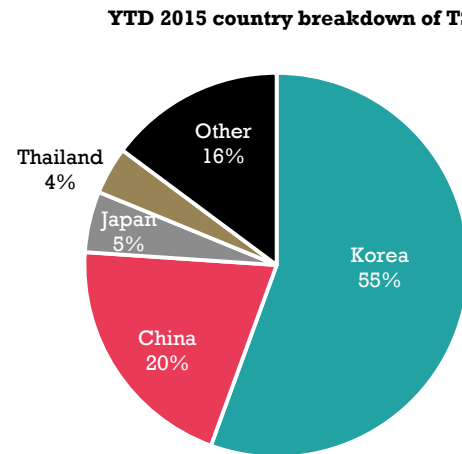
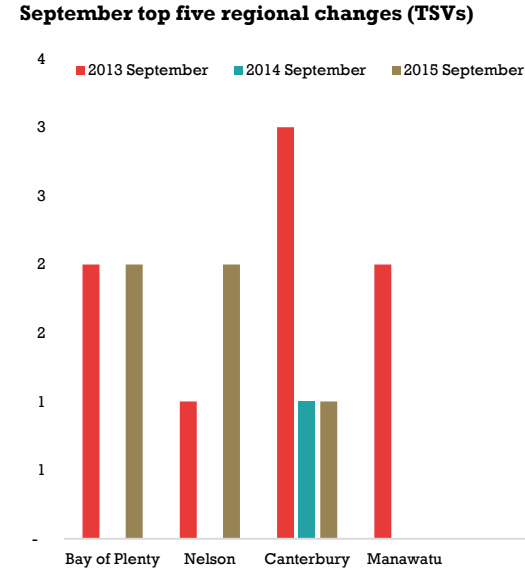
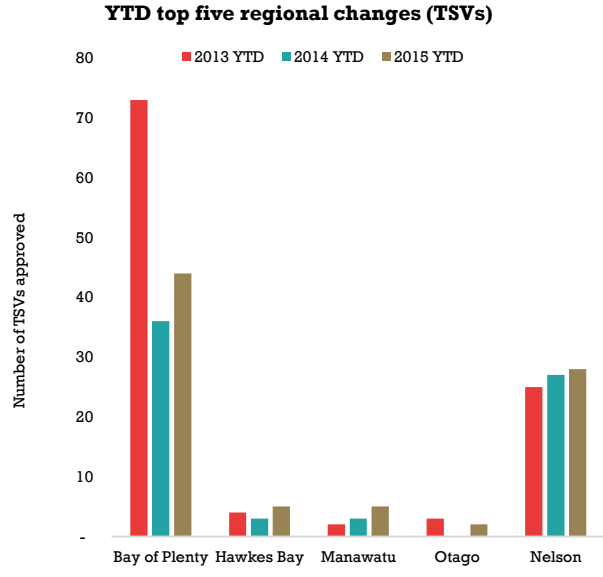
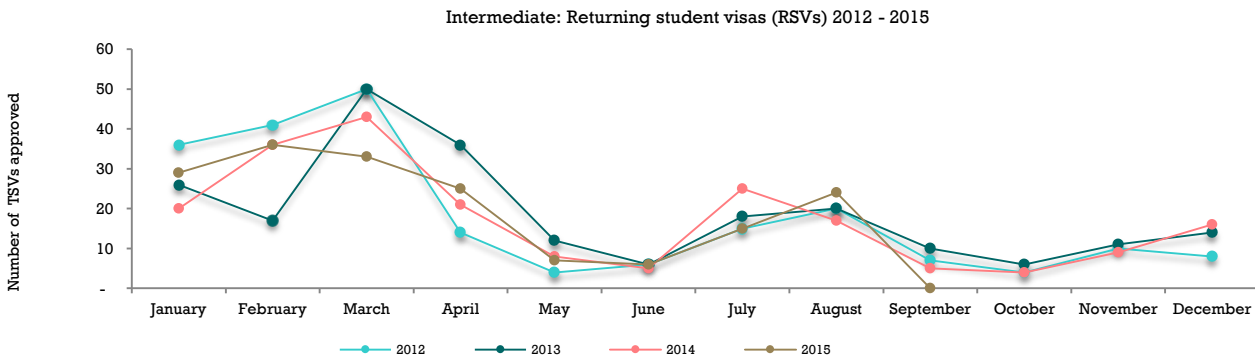
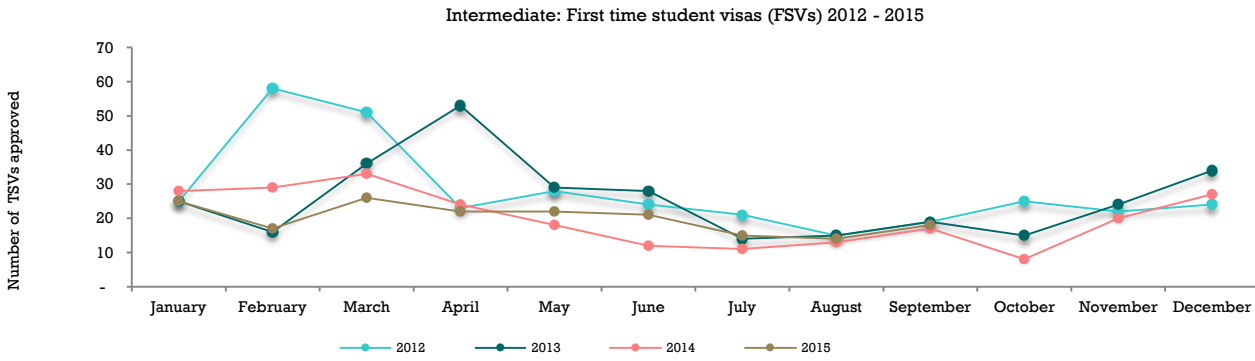
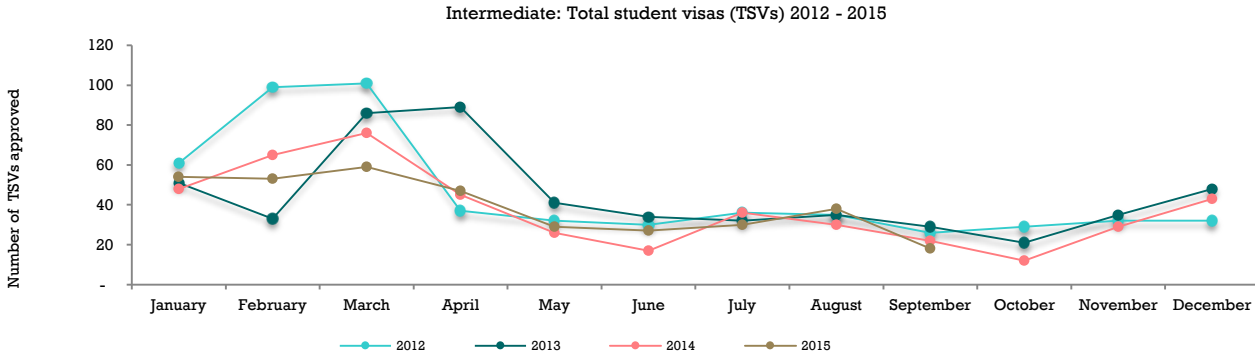


- PTEs have grown YTD, up 16% (4,070). September results have been particularly positive, with TSVs up 41% (1,141).
- Auckland PTEs have received 81% of TSVs YTD.



Takeaways:

- Primary schools have tracked positively during 2015, up 18% (58) YTD. September results have been very positive, with TSVs up 129% (18). Primary schools contain 0.5% of YTD TSVs nationwide.
- Auckland has 50% of all TSVs YTD, the Bay of Plenty has 17%, and Canterbury comprises 13%.



Takeaways:

- Intermediate schools have been flat during 2015 YTD. September results have been negative, with TSVs down 18% (-4), driven by RSVs declining 100% (-5).
- Auckland has captured 68% of TSVs YTD, followed by the Bay of Plenty with 12% and Nelson with 8%. Korean TSVs comprise 56% of total.

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