

# Student Visa Dashboard October 2015

**Regional and sector overview**





# Introduction

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- *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, 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 an 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](mailto:intelligence@enz.govt.nz).*

# Caveats and notes

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- **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 dependants, 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, Waikato and Wellington regions.
- YTD TSVs increased by 13% (9,325) and first time student visas (FSV) increased by 13% (4,293). Returning student visas also increased by 14% (5,032).
- The ITPs, PTEs, and universities have experienced the strongest YTD growth in FSVs, up 44% (1,950), 10% (1,599), and 8% (547).

## October

- October was a significant month for student visa approvals with a 36% (1,439) increase in TSVs and a 27% (683) increase in FSVs, on 2014.
- October TSV growth was driven by Auckland, Wellington, and Bay of Plenty.
- All sectors experienced growth in TSVs.

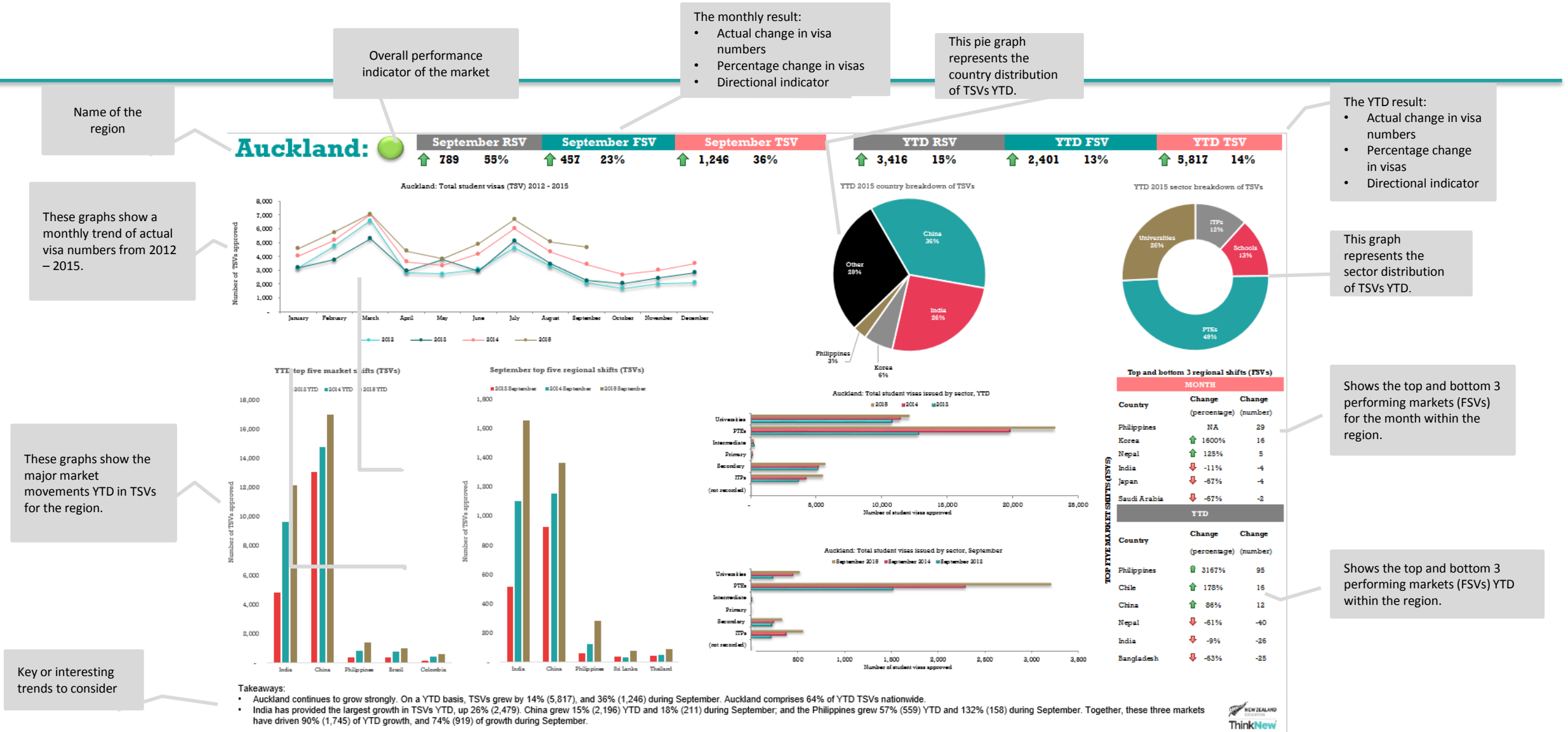
Increases	TSVs for October	Change	% change
	Auckland	1,039	39%
	Wellington	108	49%
	Bay of Plenty	94	122%
	Canterbury	92	27%
	Waikato	67	26%
Decreases	Manawatu	-10	-13%
	Nelson	-31	-34%

FSVs for October	Change	% change
Auckland	465	28%
Waikato	91	53%
Bay of Plenty	49	94%
Canterbury	48	22%
Wellington	37	25%
Southland	29	94%
Manawatu	-17	-36%
Nelson	-42	-47%

Sector TSVs for October	Change	% change
PTEs	995	40%
ITPs	245	45%
Secondary	156	37%
Universities	54	8%
Primary	10	67%
Intermediate	10	83%

Sector FSVs for October	Change	% change
PTEs	418	28%
ITPs	169	43%
Secondary	45	16%
Universities	35	10%
Primary	11	183%
Intermediate	7	88%

# 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	43,730	50,559	6,829	16%		🟢	Auckland	20,322	23,158	2,836	14%
🟢	Canterbury	6,117	6,999	882	14%		🟢	Canterbury	3,002	3,395	393	13%
🟢	Waikato	4,913	5,153	240	5%		🟢	Waikato	2,216	2,432	216	10%
🟢	Wellington	4,381	4,813	432	10%		🟢	Wellington	2,043	2,396	353	17%
🟡	Otago	3,504	3,620	116	3%		🟢	Otago	1,555	1,735	180	12%
🟡	Manawatu	2,330	2,294	-36	-2%		🟢	Bay of Plenty	901	979	78	9%
🟢	Bay of Plenty	1,493	1,791	298	20%		🟡	Manawatu	874	867	-7	-1%
🟢	Southland	691	895	204	30%		🟢	Nelson	520	578	58	11%
🟢	Nelson	716	856	140	20%		🟢	Southland	346	531	185	53%
🟢	Hawke's Bay	622	677	55	9%		🟢	Hawke's Bay	363	383	20	6%
🟡	Taranaki	649	621	-28	-4%		🟢	Undefined	221	328	107	48%
🟢	Undefined	291	461	170	58%		🔴	Northland	283	235	-48	-17%
🟡	Northland	380	394	14	4%		🔴	Taranaki	292	206	-86	-29%
🔴	Gisborne	31	25	-6	-19%		🟢	Marlborough	2	12	10	500%
🟢	Marlborough	4	15	11	275%		🔴	Gisborne	14	9	-5	-36%
🟢	Grand Total	69,860	79,185	9,325	13%		🟢	Grand Total	32,960	37,253	4,293	13%

# Overall YTD market performance

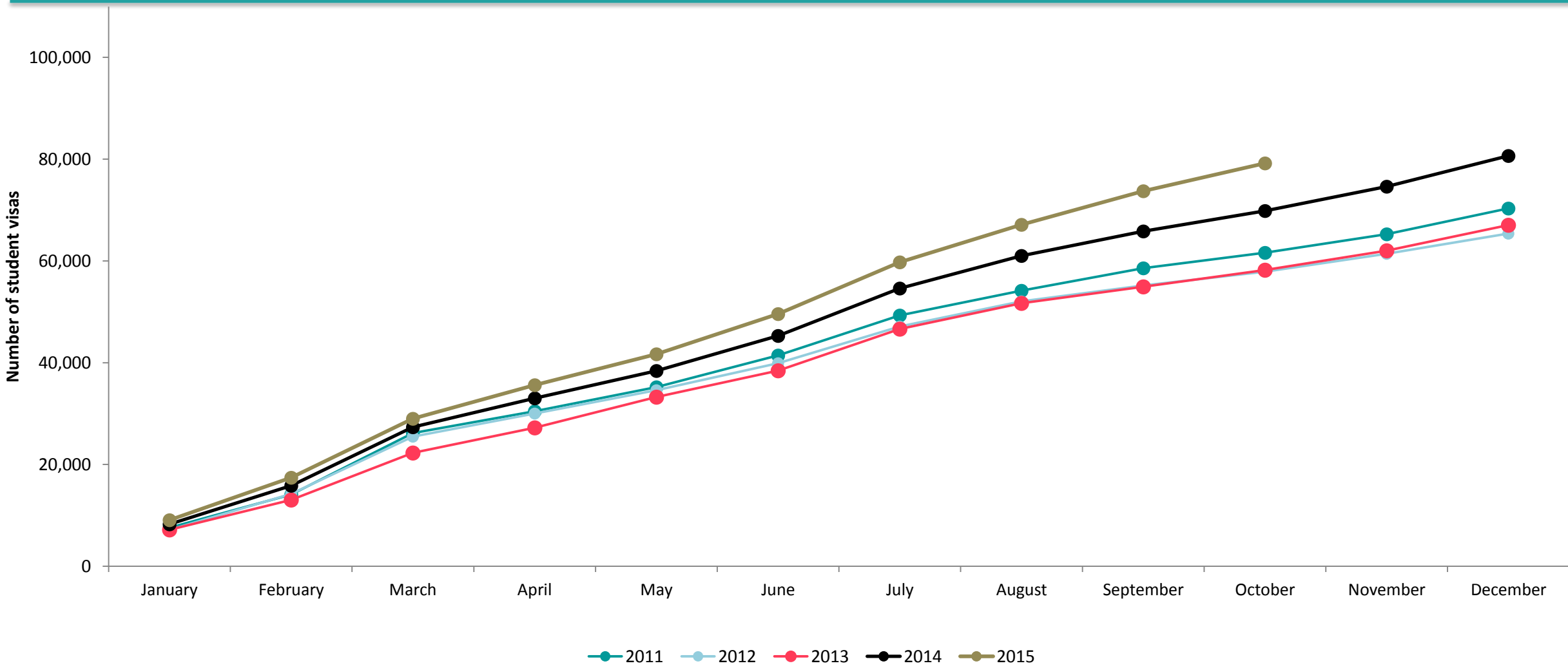
(Listed in order of 2015 volume)

Indicator	YTD TSVs	2014	2015	Change in numbers	% change
●	China	22,712	26,256	3,544	16%
●	India	14,979	18,799	3,820	26%
●	Korea	4,367	4,267	-100	-2%
●	Japan	2,619	2,626	7	0%
●	Philippines	1,167	2,445	1,278	110%
●	USA	1,796	2,105	309	17%
●	Thailand	2,008	2,009	1	0%
●	Saudi Arabia	2,337	1,901	-436	-19%
●	Brazil	1,428	1,630	202	14%
●	Viet Nam	1,465	1,444	-21	-1%
●	Malaysia	1,262	1,294	32	3%
●	Germany	1,416	1,288	-128	-9%
●	Hong Kong	970	1,007	37	4%
●	Sri Lanka	621	815	194	31%
●	Colombia	593	801	208	35%
●	Fiji	813	755	-58	-7%
●	Taiwan	771	743	-28	-4%
●	Indonesia	588	687	99	17%
●	Nepal	730	666	-64	-9%
●	Russia	556	563	7	1%
●	<b>Grand Total</b>	<b>69,860</b>	<b>79,185</b>	<b>9,325</b>	<b>13%</b>

Indicator	YTD FSVs	2014	2015	Change in numbers	% change
●	India	10,234	11,352	1,118	11%
●	China	6,186	7,388	1,202	19%
●	Philippines	952	2,228	1,276	134%
●	USA	1,495	1,825	330	22%
●	Korea	1,639	1,645	6	0%
●	Japan	1,377	1,431	54	4%
●	Brazil	1,238	1,343	105	8%
●	Germany	1,189	1,103	-86	-7%
●	Thailand	1,008	886	-122	-12%
●	Colombia	486	605	119	24%
●	Viet Nam	404	468	64	16%
●	Sri Lanka	256	461	205	80%
●	Malaysia	323	452	129	40%
●	Chile	333	386	53	16%
●	Great Britain	333	361	28	8%
●	Indonesia	262	306	44	17%
●	Nepal	549	300	-249	-45%
●	France	317	287	-30	-9%
●	Bangladesh	203	282	79	39%
●	Saudi Arabia	490	277	-213	-43%
●	<b>Grand Total</b>	<b>32,960</b>	<b>37,253</b>	<b>4,293</b>	<b>13%</b>

# Overall YTD tracker

Cumulative total



Takeaways:

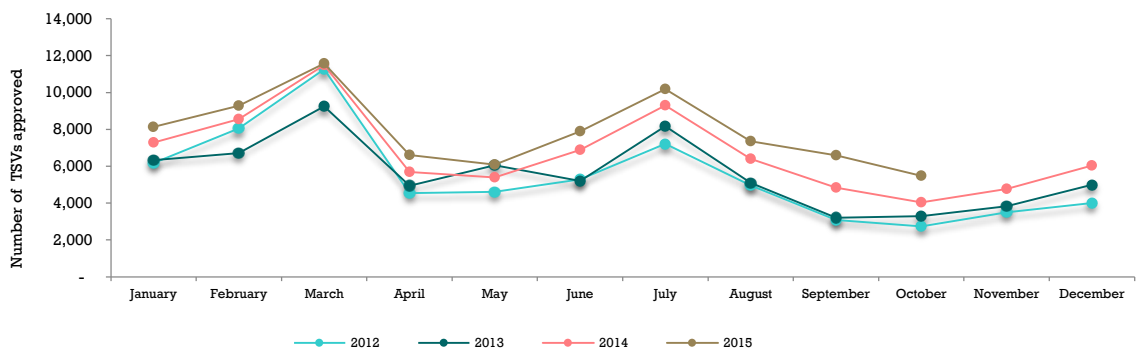
- 2015 is tracking strongly above previous years, and is up 13% (9,325) YTD.



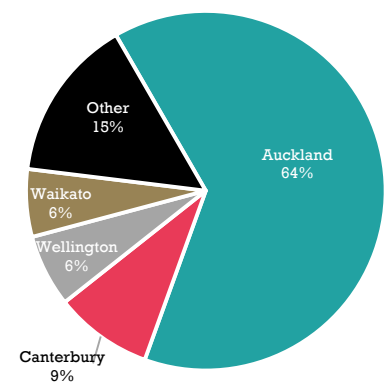
# Overall:



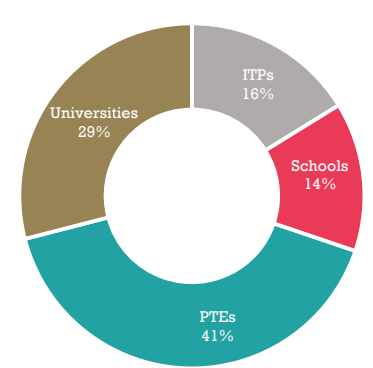
Overall: Total student visas (TSVs) 2012 - 2015



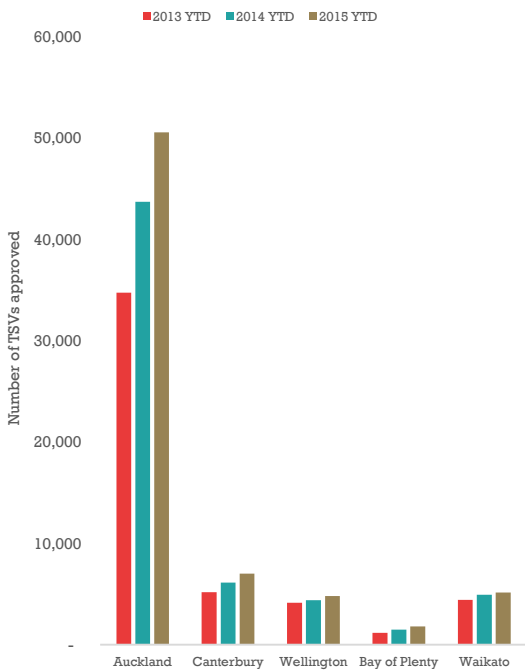
YTD 2015 country breakdown of TSVs



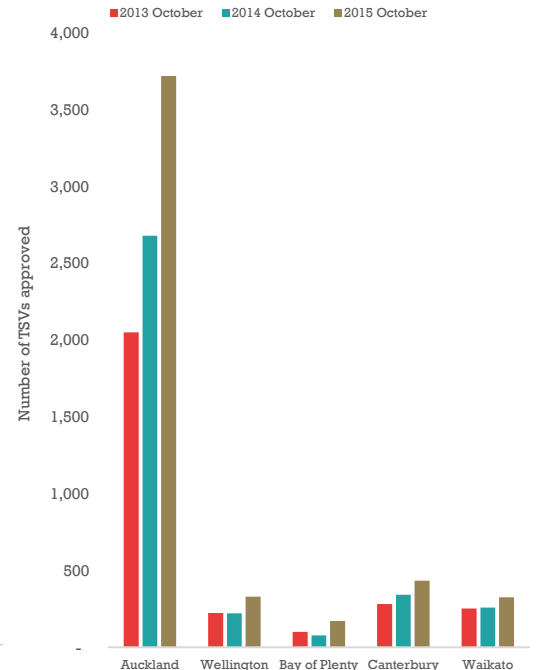
YTD 2015 sector breakdown of TSVs



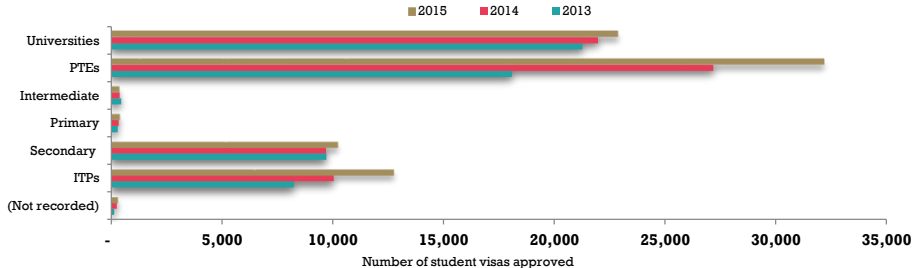
YTD top five regional shifts (TSVs)



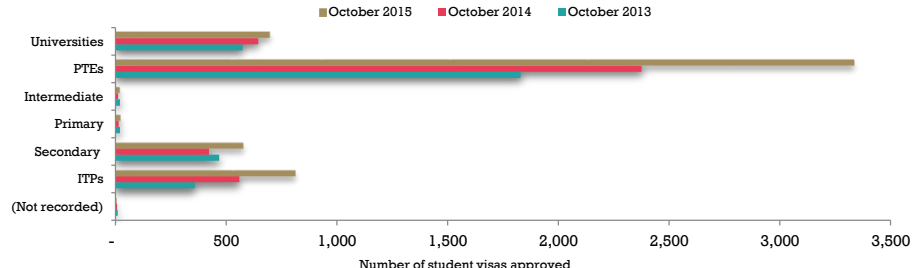
October top five regional shifts (TSVs)



Overall: Total student visas issued by sector, YTD



Overall: Total student visas issued by sector, October



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Auckland	↑ 28%	465
Waikato	↑ 53%	91
Bay of Plenty	↑ 94%	49
Nelson	↓ -47%	-42
Manawatu	↓ -36%	-17
Hawkes Bay	↓ -18%	-6

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
Auckland	↑ 14%	2836
Canterbury	↑ 13%	393
Wellington	↑ 17%	353
Taranaki	↓ -29%	-86
Northland	↓ -17%	-48
Manawatu	↓ -1%	-7

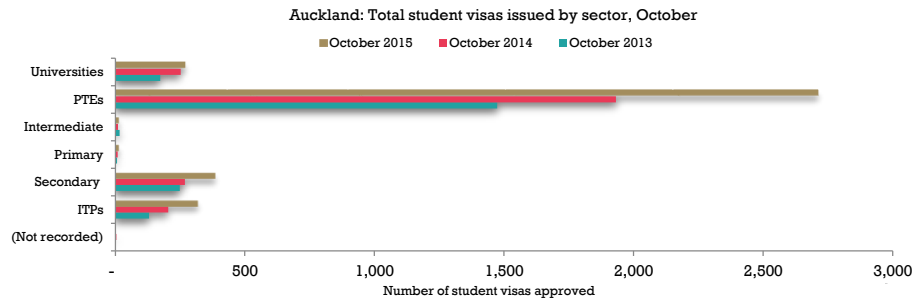
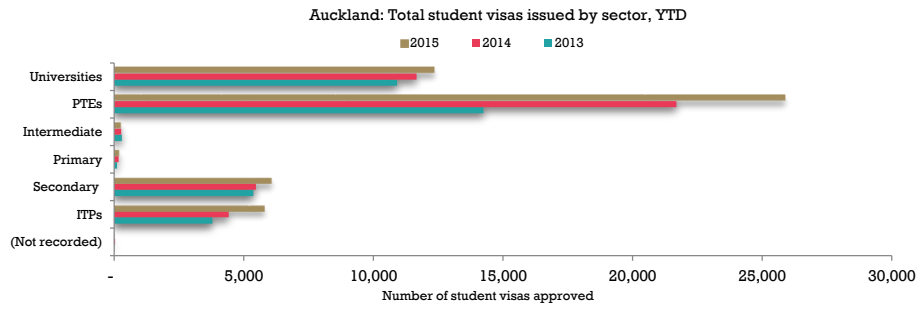
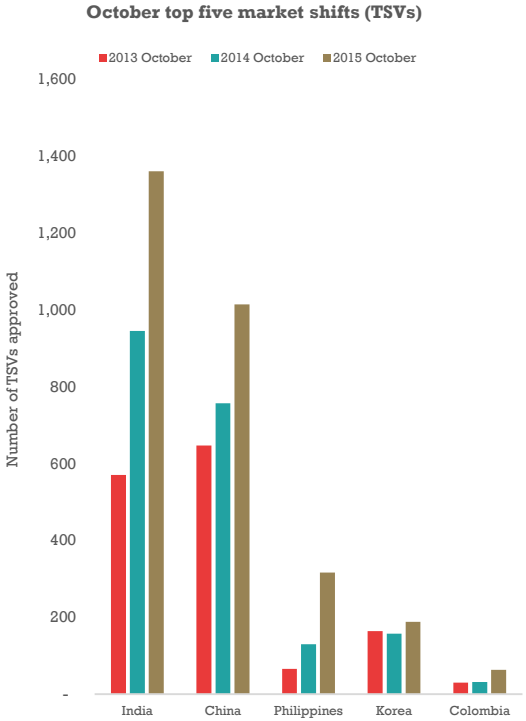
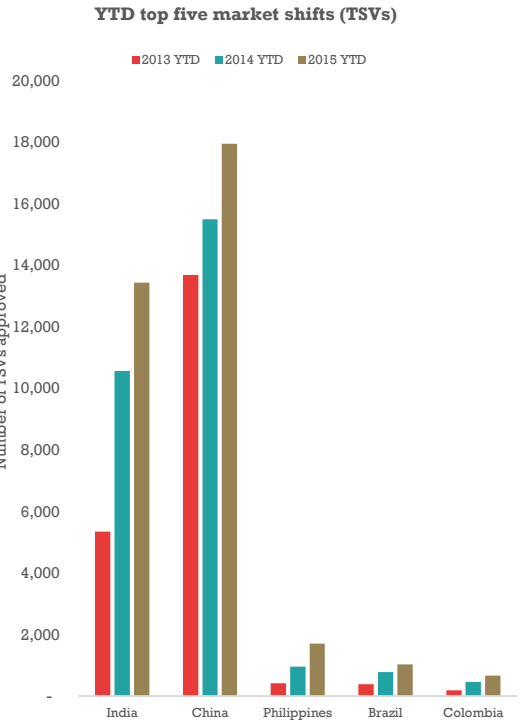
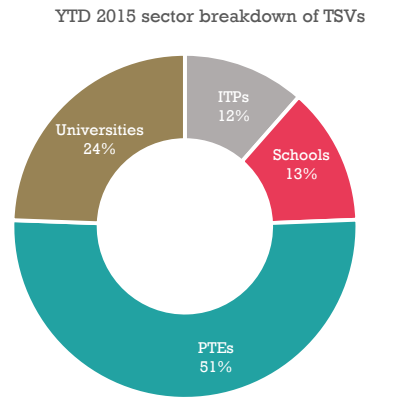
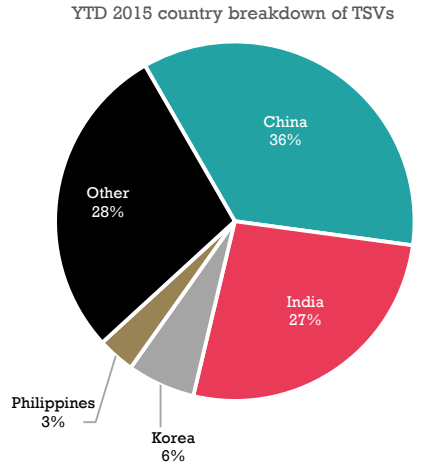
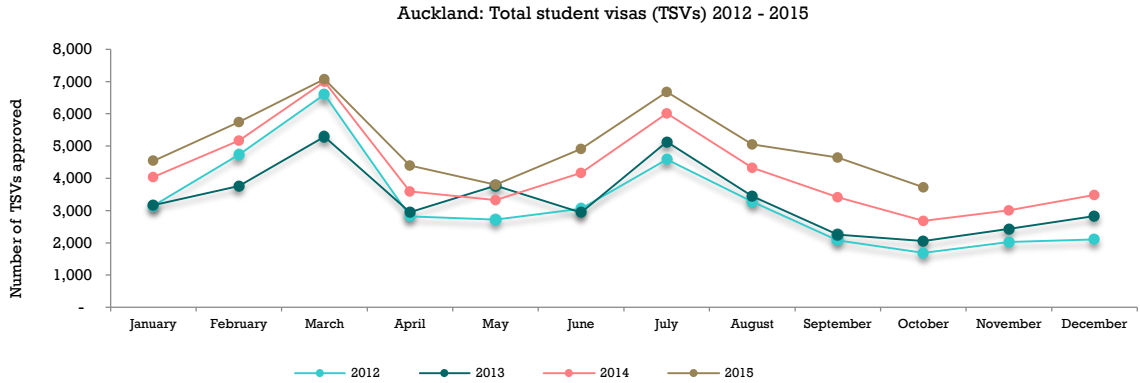
## Takeaways:

- YTD TSVs continue to grow, up 13% (9,325). October was a strong month, increasing by 51% in RSVs (756) and 27% in FSVs (683). Together, this led to a 36% (1,439) growth in TSVs.
- Auckland has captured a significant proportion of YTD and October growth. YTD, 64% of TSVs were for study 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 10% (432); Bay of Plenty, up 20% (298); and Waikato, up 5% (240).

# Auckland:



October RSV					October FSV		October TSV		YTD RSV		YTD FSV		YTD TSV	
↑ 574					↑ 465	28%	↑ 1,039	39%	↑ 3,993	17%	↑ 2,836	14%	↑ 6,829	16%



Top and bottom 3 regional shifts (FSVs)			
MONTH			
Country	Change (percentage)	Change (number)	
Philippines	↑ 159%	189	
China	↑ 32%	106	
India	↑ 8%	57	
Russia	↓ -53%	-18	
Saudi Arabia	↓ -48%	-10	
Taiwan	↓ -57%	-8	
YTD			
Country	Change (percentage)	Change (number)	
China	↑ 19%	784	
India	↑ 10%	764	
Philippines	↑ 90%	738	
Nepal	↓ -55%	-165	
Saudi Arabia	↓ -36%	-106	
Fiji	↓ -28%	-58	

Takeaways:

- Auckland continues to experience strong growth. On a YTD basis, TSVs grew by 16% (6,829), and 39% (1,039) during October.
- India has provided the largest growth in TSVs YTD, up 24% (2,871). TSVs from China grew 16% (2,448) YTD and TSVs were up 34% (257) during October; and the Philippines grew 78% (743) YTD in TSVs and TSVs were up 143% (186) during October. Together, these three markets have driven 89% (6,062) of YTD growth, and 83% (858) of growth during October.

# Bay of Plenty:



October RSV  
45 180%

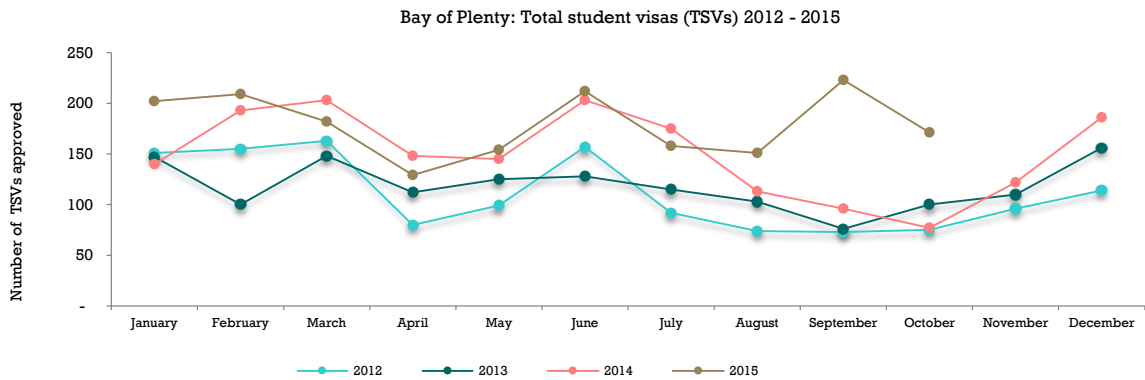
October FSV  
49 94%

October TSV  
94 122%

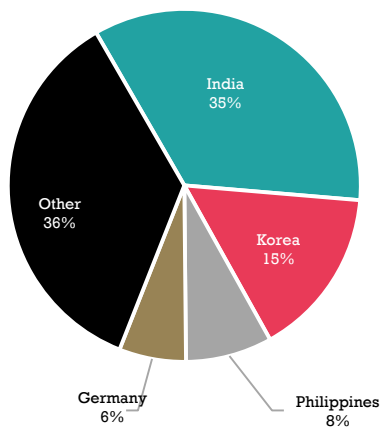
YTD RSV  
220 37%

YTD FSV  
78 9%

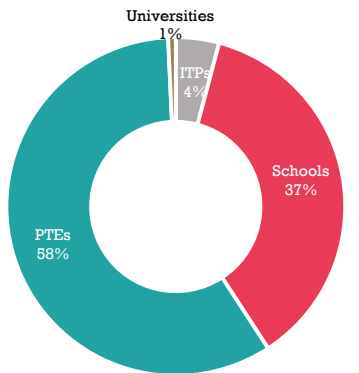
YTD TSV  
298 20%



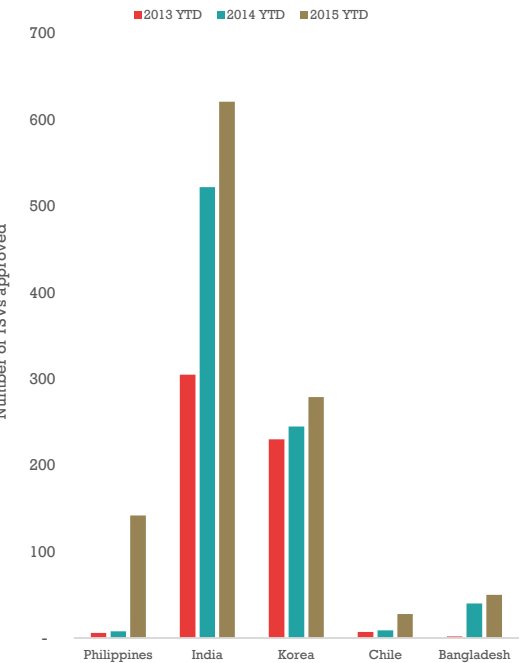
YTD 2015 country breakdown of TSVs



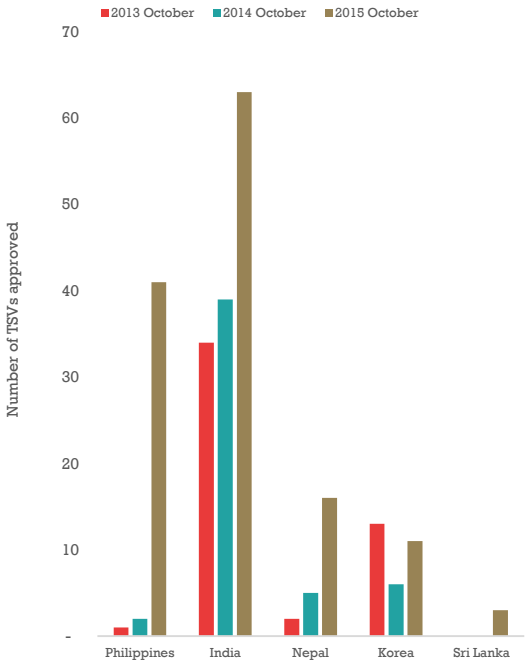
YTD 2015 sector breakdown of TSVs



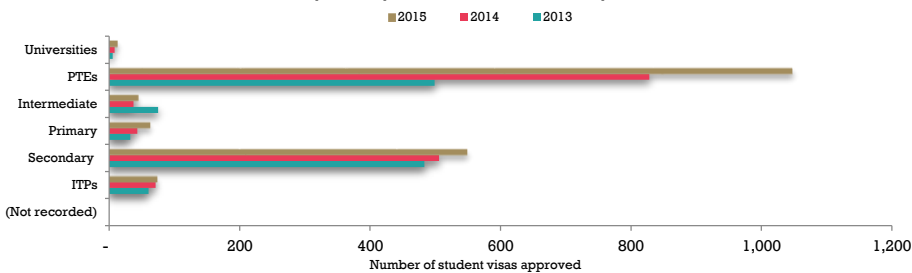
YTD top five market shifts (TSVs)



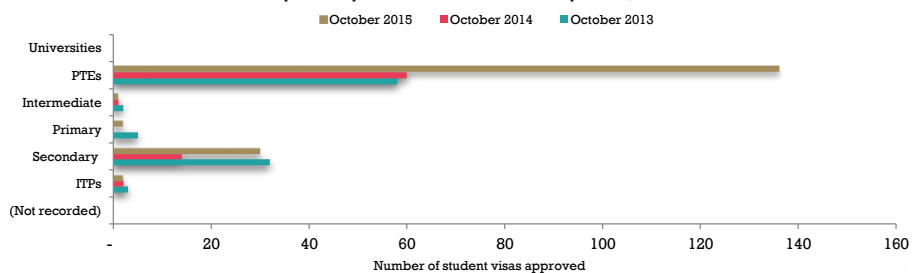
October top five market shifts (TSVs)



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



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



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Philippines	1850%	37
Sri Lanka	NA	3
Korea	40%	2
Germany	-22%	-2
Nepal	-33%	-1
Thailand	-50%	-1

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
Philippines	2640%	132
Chile	189%	17
China	93%	14
Nepal	-59%	-41
Bangladesh	-63%	-25
India	-8%	-24

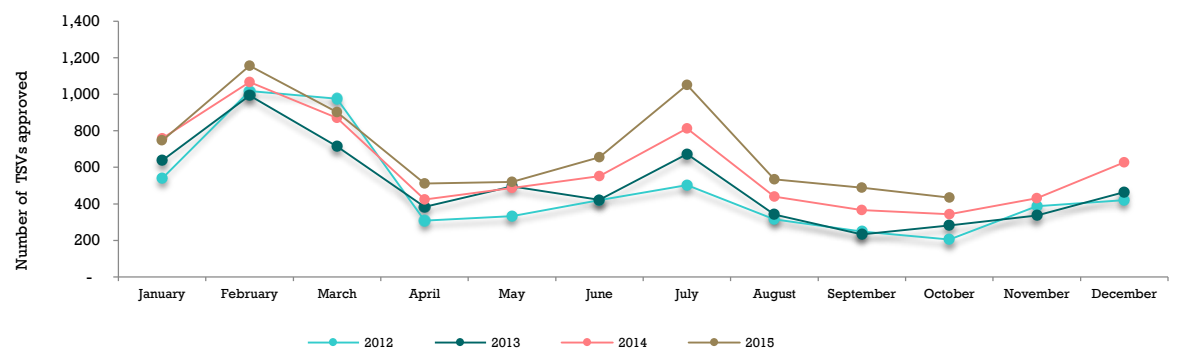
## Takeaways:

- The Bay of Plenty (BOP) has provided strong TSV growth of 20% (298) YTD and TSVs were up 122% (94) during October
- The Philippines has increased by 1,675% (134) YTD.
- Nepal, Bangladesh and India have declined FSVs YTD.

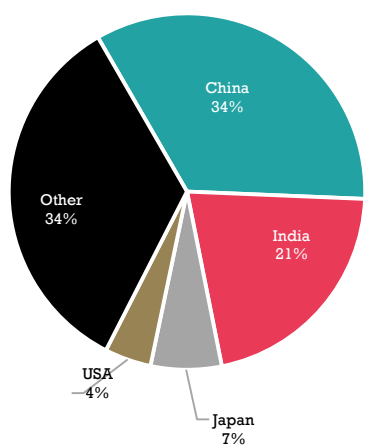
# Canterbury:

	October RSV	October FSV	October TSV	YTD RSV	YTD FSV	YTD TSV
	↑ 44 35%	↑ 48 22%	↑ 92 27%	↑ 489 16%	↑ 393 13%	↑ 882 14%

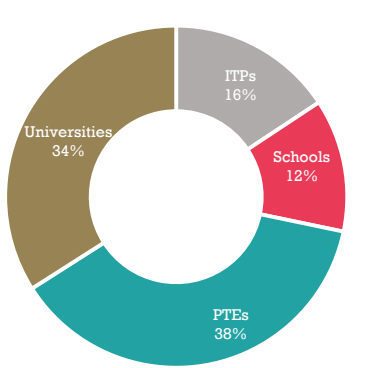
Canterbury: Total student visas (TSVs) 2012 - 2015



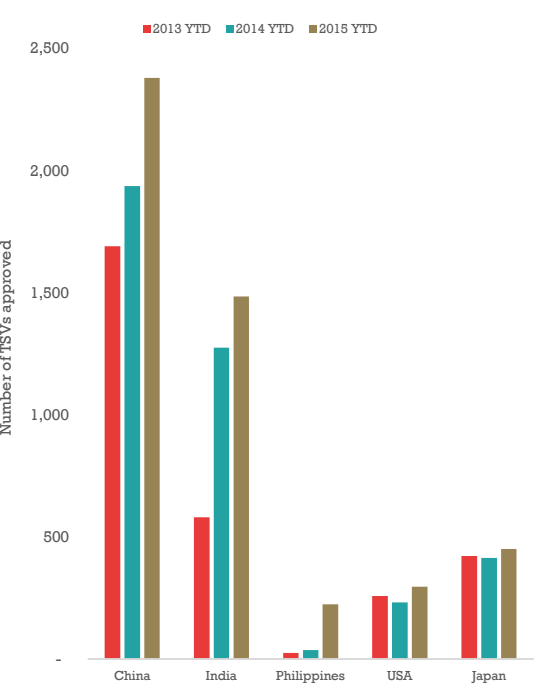
YTD 2015 country breakdown of TSVs



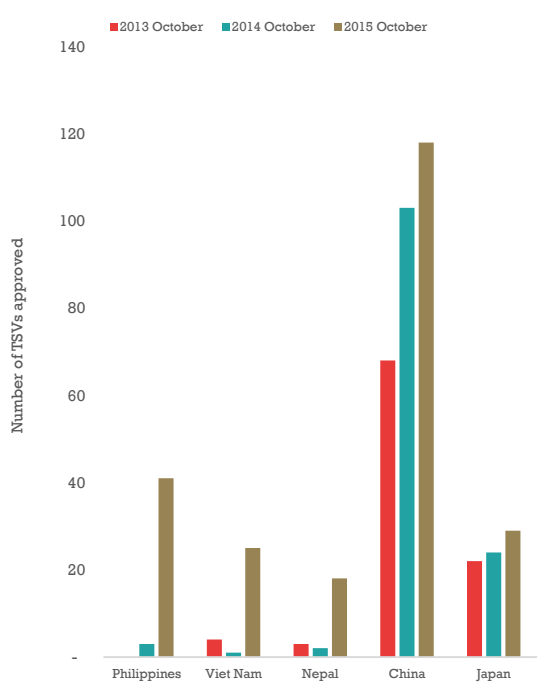
YTD 2015 sector breakdown of TSVs



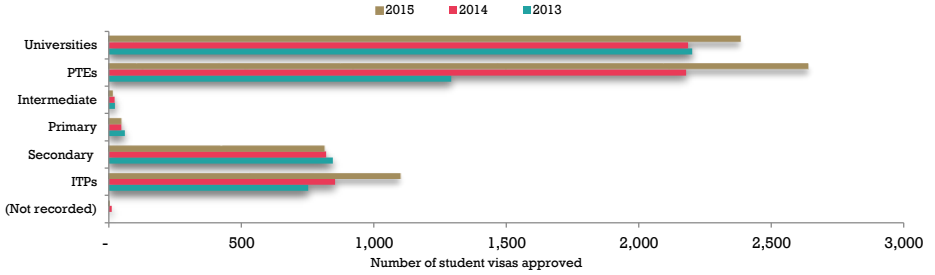
YTD top five market shifts (TSVs)



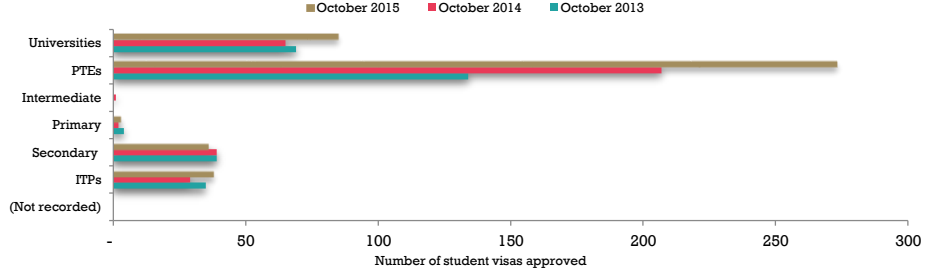
October top five market shifts (TSVs)



Canterbury: Total student visas issued by sector, YTD



Canterbury: Total student visas issued by sector, October



Top and bottom 3 regional shifts (FSVs)

	MONTH	
Country	Change (percentage)	Change (number)
Philippines	↑ 1267%	38
Viet Nam	↑ 2200%	22
Nepal	↑ 600%	12
India	↓ -20%	-19
Japan	↓ -36%	-5
Thailand	↓ -50%	-3
YTD		
Country	Change (percentage)	Change (number)
Philippines	↑ 910%	182
China	↑ 26%	136
USA	↑ 30%	63
Thailand	↓ -29%	-33
Brazil	↓ -24%	-28
Germany	↓ -14%	-17

TOP FIVE MARKET SHIFTS (FSVs)

## Takeaways:

- Canterbury continues to grow TSVs strongly; up 14% (882) YTD, and 27% (92) during October. Canterbury comprises 9% of YTD TSVs nationwide.
- YTD, Chinese TSVs increased by 23% (443), and TSVs were up 15% (15) during October. India has grown 16% (210) YTD but experienced a decline in TSVs for October down 4% (-5). The Philippines TSVs grew 519% (187) YTD and TSVs were up 1,267% (38) during October.



# Hawke's Bay:



October RSV  
↑ 7 88%

October FSV  
↓ -6 -18%

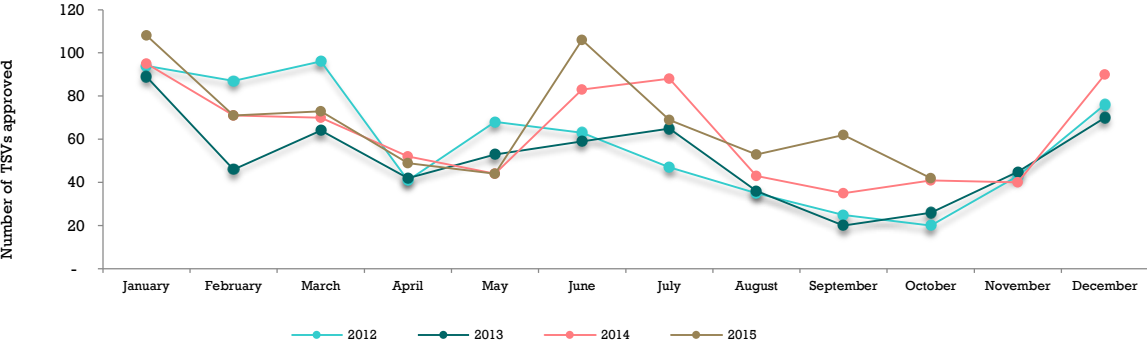
October TSV  
→ 1 2%

YTD RSV  
↑ 35 14%

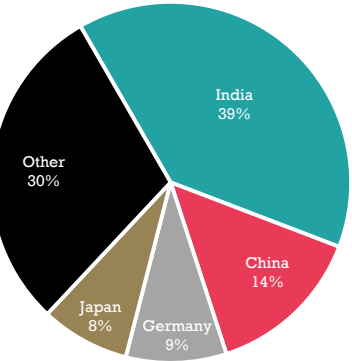
YTD FSV  
↑ 20 6%

YTD TSV  
↑ 55 9%

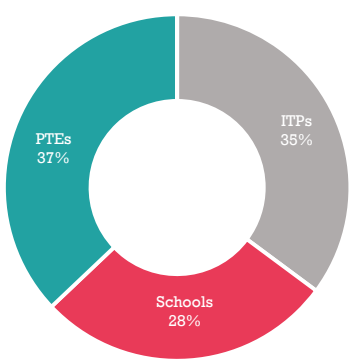
Hawkes Bay: Total student visas (TSVs) 2012 - 2015



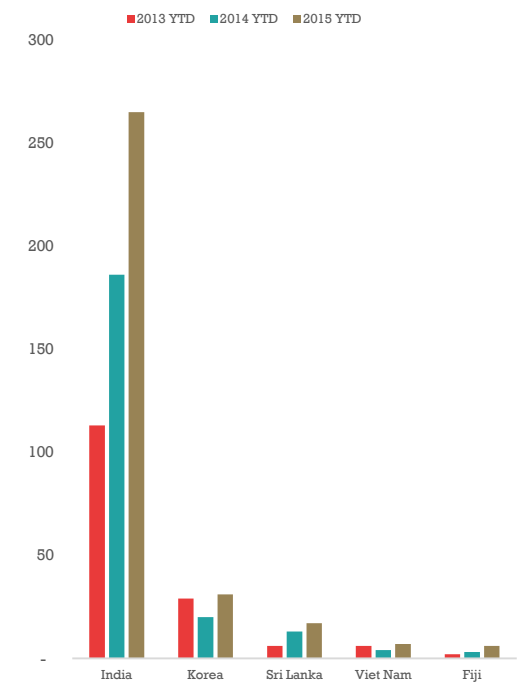
YTD 2015 country breakdown of TSVs



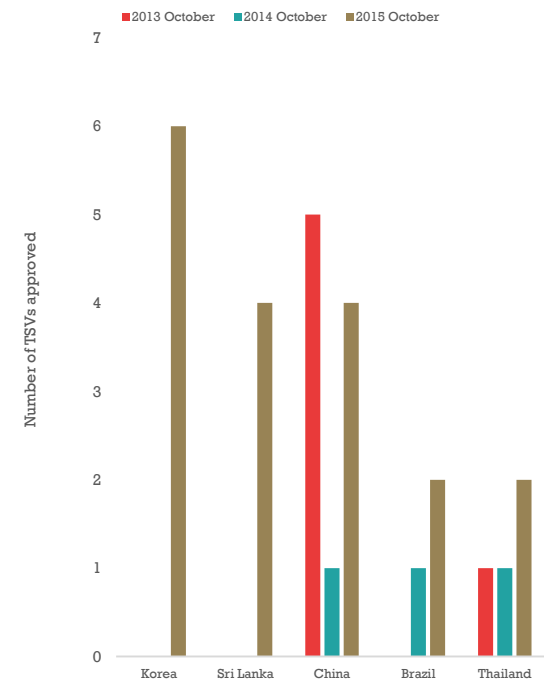
YTD 2015 sector breakdown of TSVs



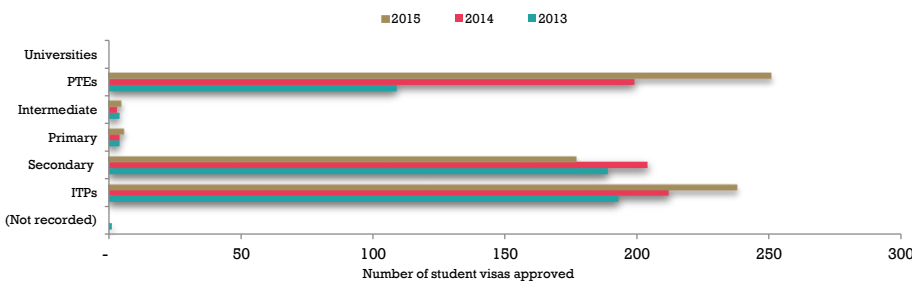
YTD top five market shifts (TSVs)



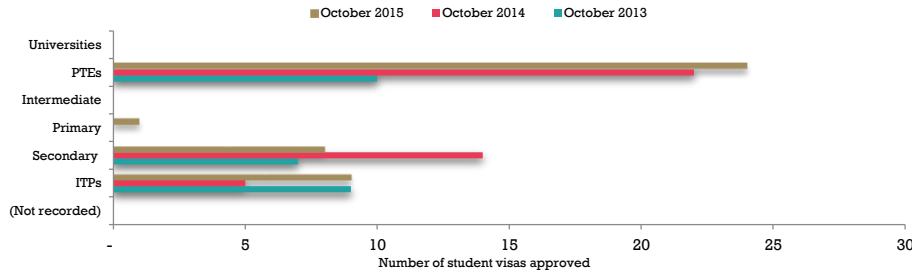
October top five market shifts (TSVs)



Hawkes Bay: Total student visas issued by sector, YTD



Hawkes Bay: Total student visas issued by sector, October



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Korea	NA	5
China	↑ 300%	3
Sri Lanka	NA	2
India	↓ -67%	-8
Germany	↓ -33%	-3
Japan	↓ -100%	-2
YTD		

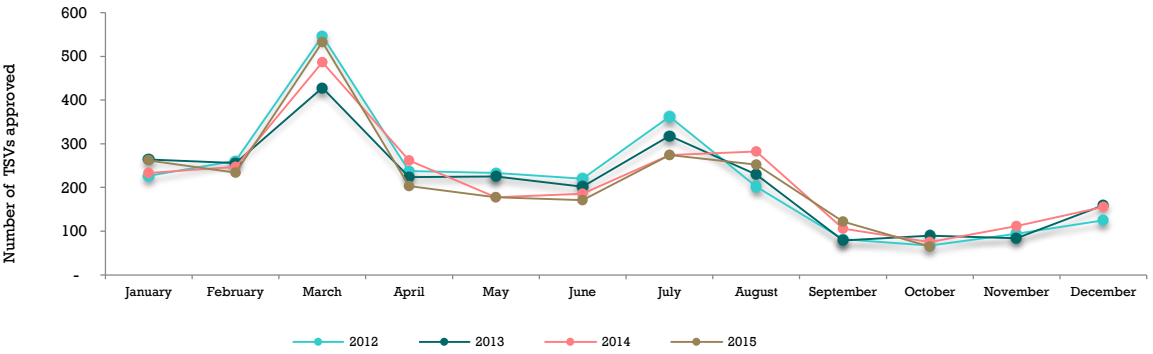
Country	Change (percentage)	Change (number)
India	↑ 31%	36
Korea	↑ 88%	7
Sri Lanka	↑ 57%	4
Brazil	↓ -62%	-13
Germany	↓ -19%	-12
Thailand	↓ -38%	-6

TOP FIVE MARKET SHIFTS (FSVs)

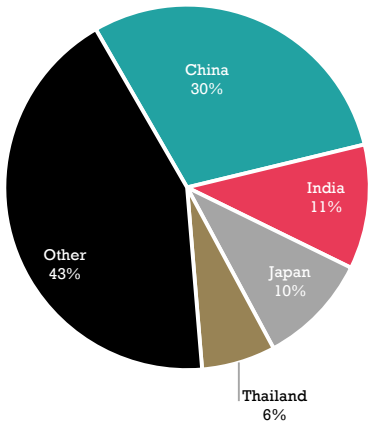
- Takeaways:
- TSVs YTD experienced a 9% (55) increase, with a flat result 2% (1) for October on 2014.
  - India has generated the majority of TSV growth YTD, up 42% (79).
  - Hawke's Bay has also experienced some declining markets: Brazil, Germany, and Thailand YTD FSVs.

October RSV	October FSV	October TSV	YTD RSV	YTD FSV	YTD TSV
 7 25%	 -17 -36%	 -10 -13%	 -29 -2%	 -7 -1%	 -36 -2%

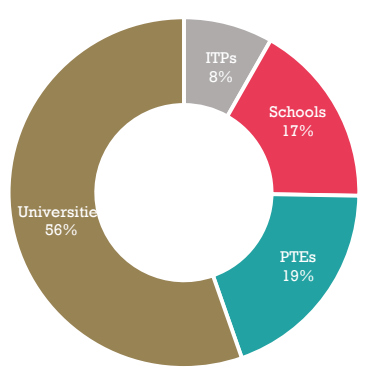
Manawatu: Total student visas (TSVs) 2012 - 2015



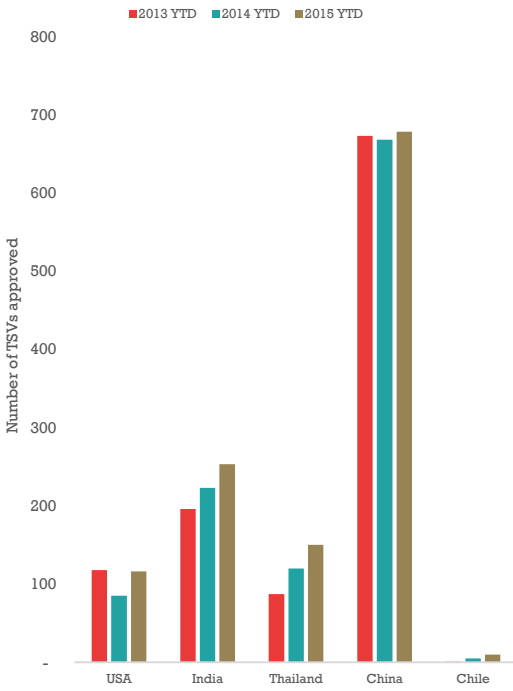
YTD 2015 country breakdown of TSVs



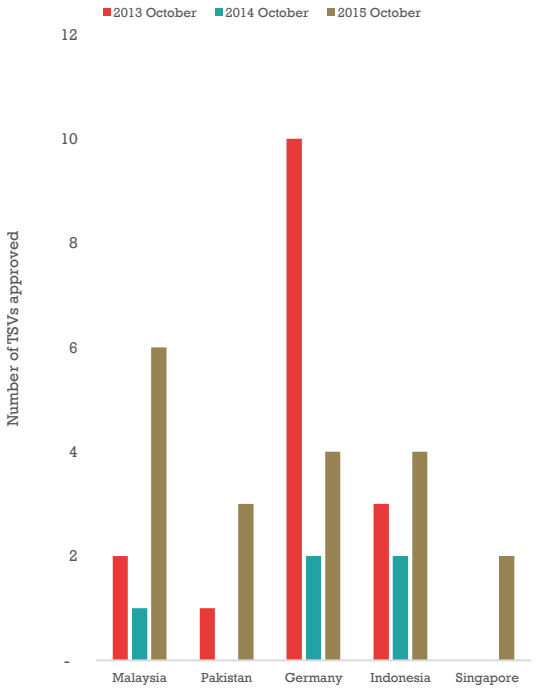
YTD 2015 sector breakdown of TSVs



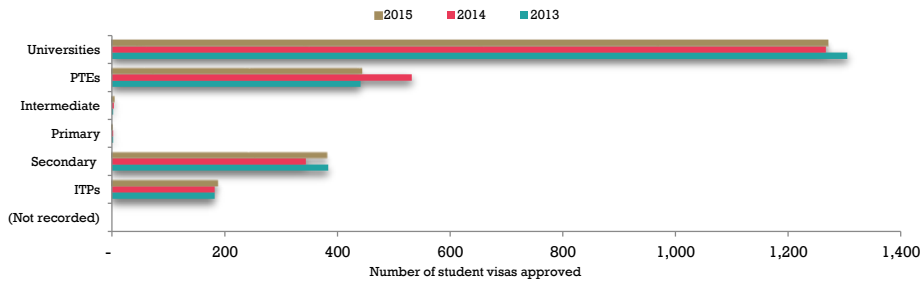
YTD top five market shifts (TSVs)



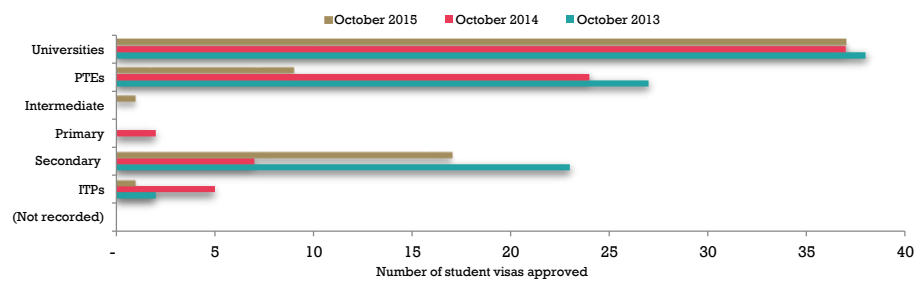
October top five market shifts (TSVs)






Manawatu: Total student visas issued by sector, YTD









Manawatu: Total student visas issued by sector, October



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Indonesia	NA	2
Malaysia	NA	2
Pakistan	NA	2
Saudi Arabia	 -100%	-6
Papua New Guinea	 -100%	-4
India	 -33%	-3

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
USA	 69%	35
India	 18%	23
Thailand	 34%	20
Japan	 -22%	-25
Indonesia	 -69%	-25
Papua New Guinea	 -63%	-12

Takeaways:

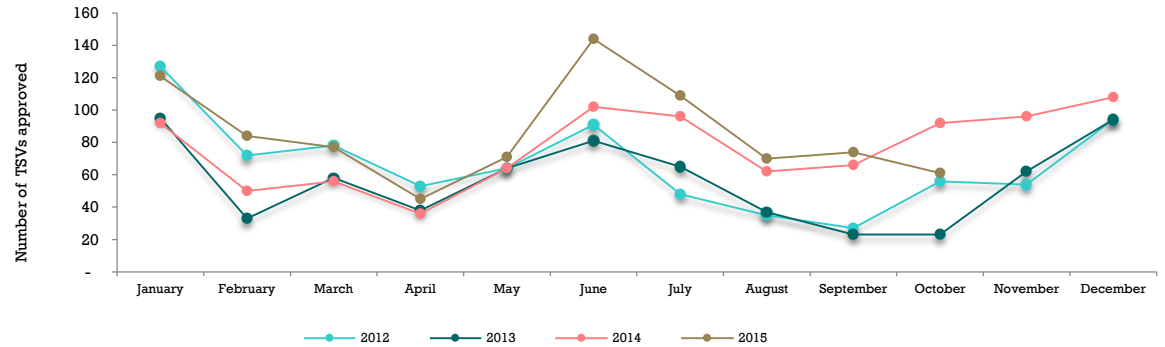
- The Manawatu region has been flat YTD with TSVs down 2% (-36), and TSVs were down 13% (-10) during October. Manawatu-Wanganui comprises 3% of YTD TSVs nationwide.
- YTD in TSVs growth in key markets has been spread between the USA, India and Thailand.

October RSV			October FSV			October TSV		
↑	11	550%	↓	-42	-47%	↓	-31	-34%

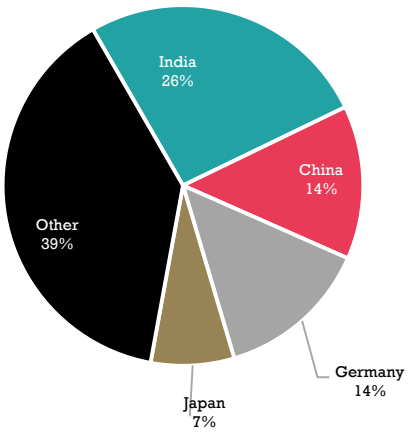
YTD RSV			YTD FSV			YTD TSV		
↑	82	42%	↑	58	11%	↑	140	20%

YTD (January to October)

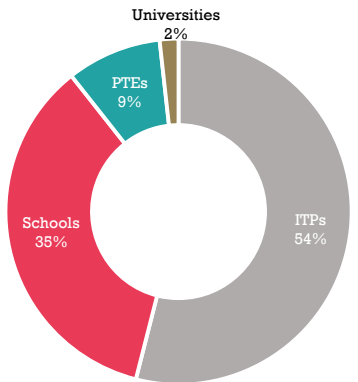
Nelson: Total student visas (TSVs) 2012 - 2015



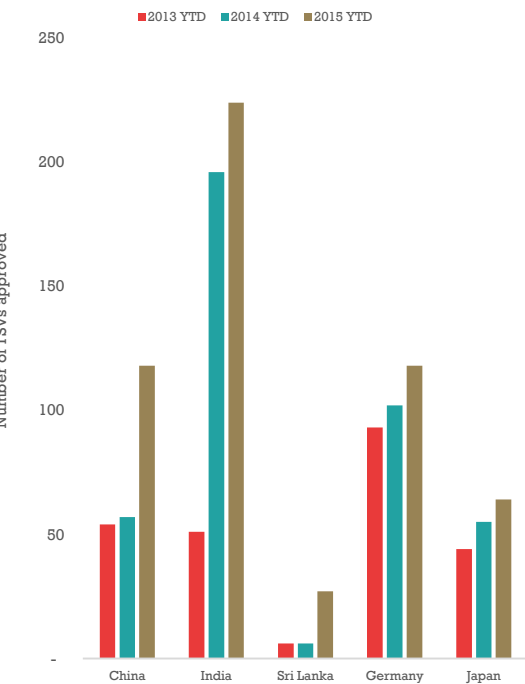
YTD 2015 country breakdown of TSVs



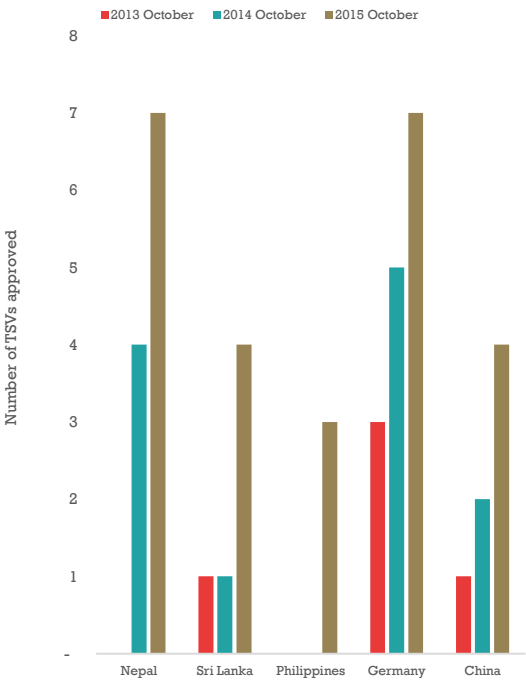
YTD 2015 sector breakdown of TSVs



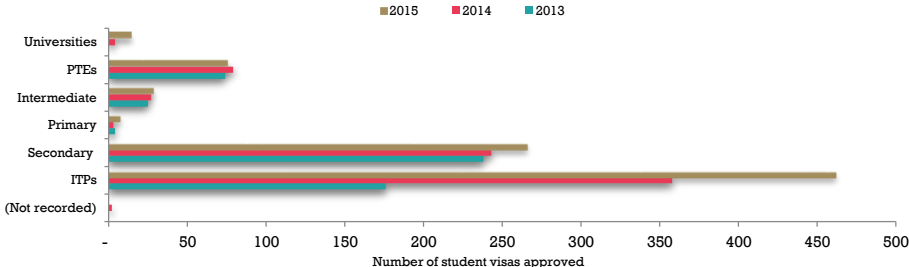
YTD top five market shifts (TSVs)



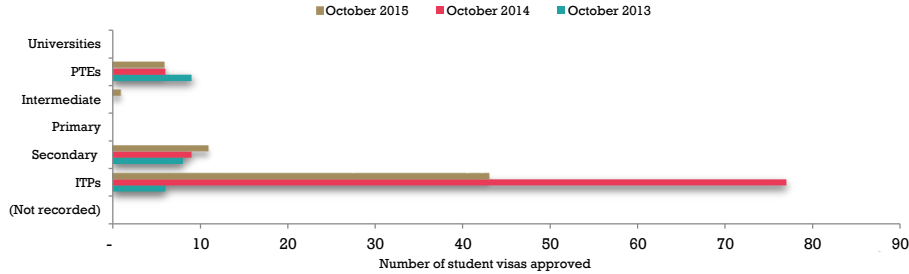
October top five market shifts (TSVs)



Nelson: Total student visas issued by sector, YTD



Nelson: Total student visas issued by sector, October



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Germany	↑ 75%	3
Sri Lanka	↑ 300%	3
Philippines	NA	3
India	↓ -74%	-43
Saudi Arabia	↓ -100%	-9
Korea	↓ -100%	-3

YTD		
Country	Change (percentage)	Change (number)
China	↑ 126%	39
Sri Lanka	↑ 1150%	23
Germany	↑ 22%	19
Nepal	↓ -41%	-12
Brazil	↓ -48%	-11
Norway	↓ -67%	-10

TOP FIVE MARKET SHIFTS (FSVs)

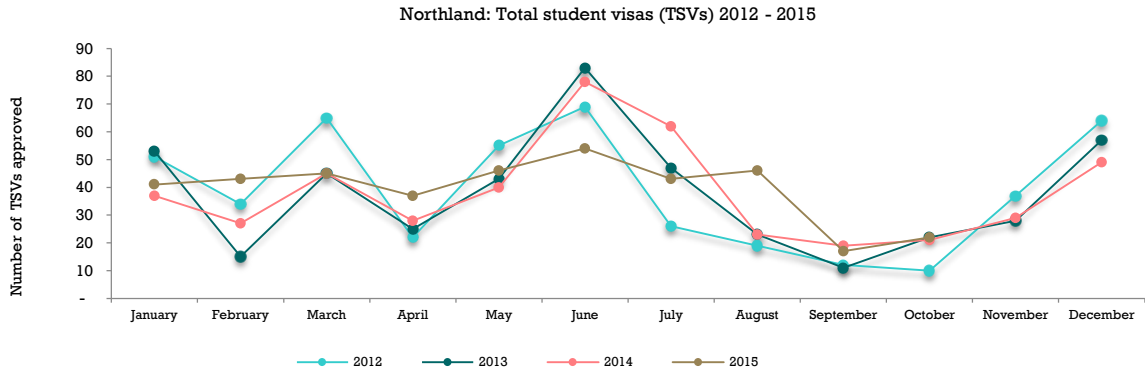
Takeaways:

- Nelson YTD TSVs are up 20% (140), driven by gains in both RSVs and in FSVs. Nelson experienced a decline in October, down 34% (-31) in TSVs.
- YTD TSV growth in key markets has been from India, up 14% (28), and China, up 107% (61). FSV declines have come from Nepal, Brazil, and Norway.

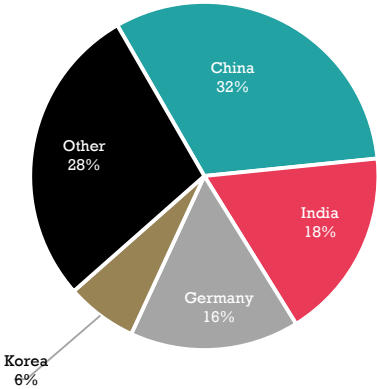
October RSV			October FSV			October TSV		
➡	0	0%	➡	1	6%	➡	1	5%

YTD RSV			YTD FSV			YTD TSV		
⬆	62	64%	⬇	-48	-17%	➡	14	4%

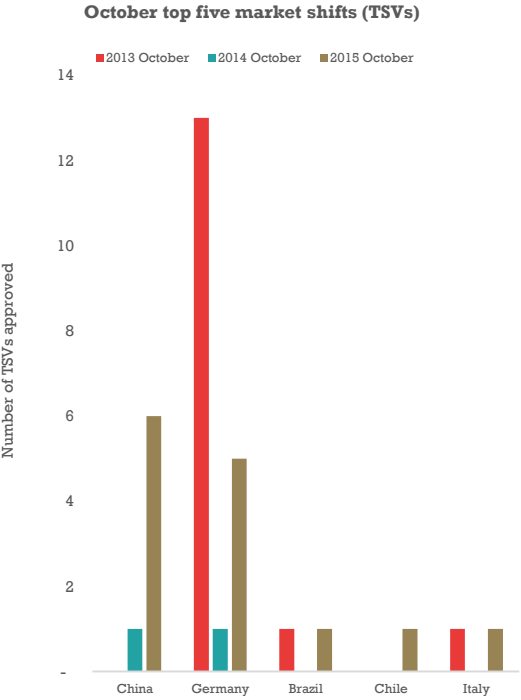
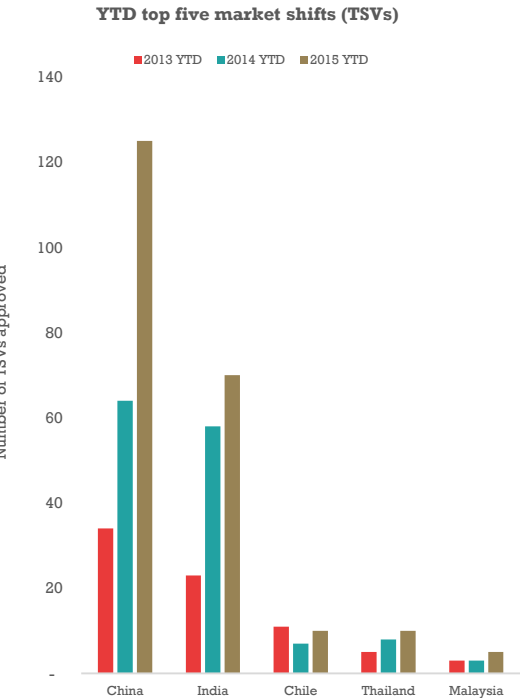
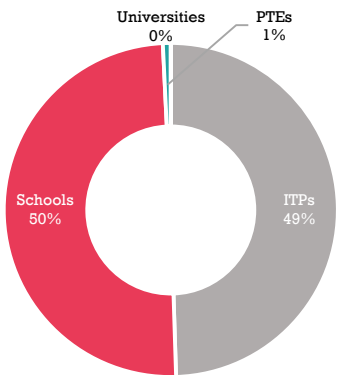
YTD (January to October)



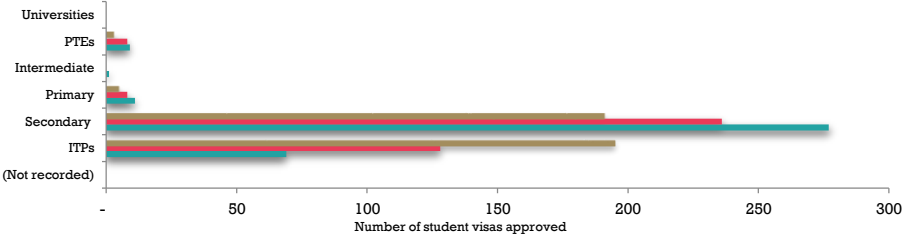
YTD 2015 country breakdown of TSVs



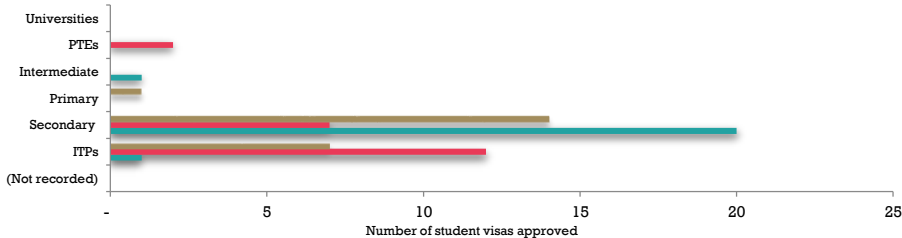
YTD 2015 sector breakdown of TSVs



Northland: Total student visas issued by sector, YTD



Northland: Total student visas issued by sector, October



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
China	NA	5
Germany	⬆ 400%	4
Brazil	NA	1
India	⬇ -70%	-7
Canada	⬇ -100%	-2
Austria	⬇ -50%	-1

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
China	⬆ 24%	10
Korea	⬆ 100%	6
Chile	⬆ 100%	4
Brazil	⬇ -64%	-21
Germany	⬇ -22%	-16
India	⬇ -27%	-13

- Takeaways:
- Northland has been flat in TSVs YTD, up 4% (14). This was driven by offsetting results in RSVs, which gained 64% (62), and FSVs, down 17% (48) on 2014.
  - YTD, China has gained 95% (61) in TSVs. Major declines in YTD FSVs came from Brazil, Germany, and India.

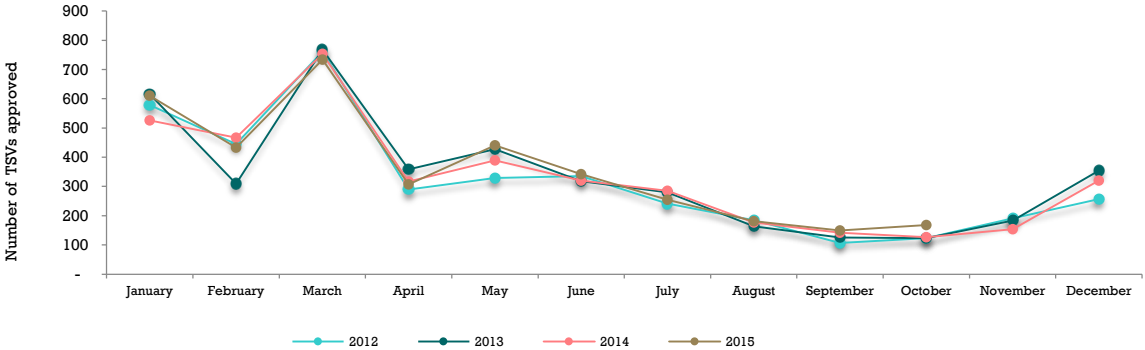


October RSV			October FSV			October TSV		
↑	24	44%	↑	17	23%	↑	41	32%

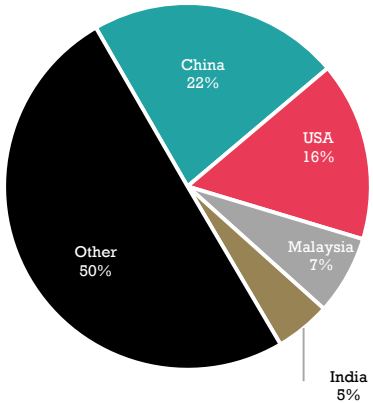
YTD RSV			YTD FSV			YTD TSV		
→	-64	-3%	↑	180	12%	→	116	3%

YTD (January to October)

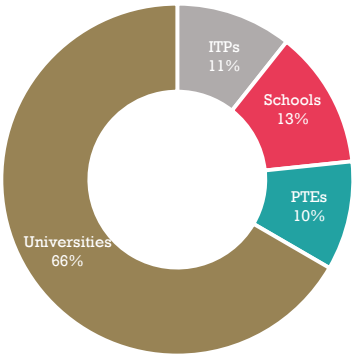
Otago: Total student visas (TSVs) 2012 - 2015



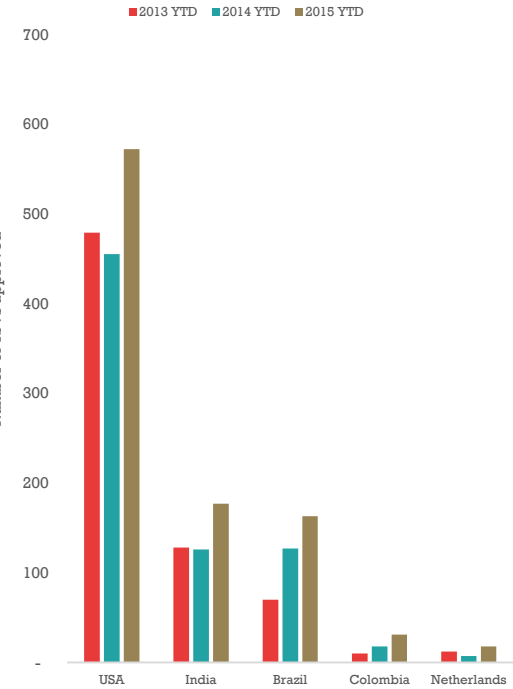
YTD 2015 country breakdown of TSVs



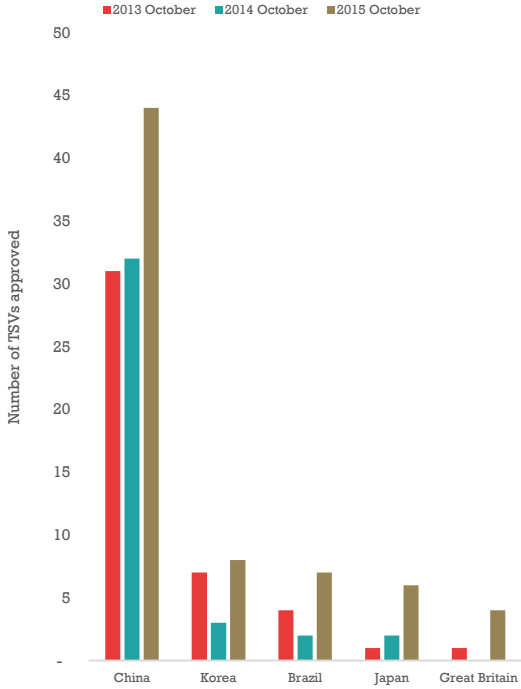
YTD 2015 sector breakdown of TSVs



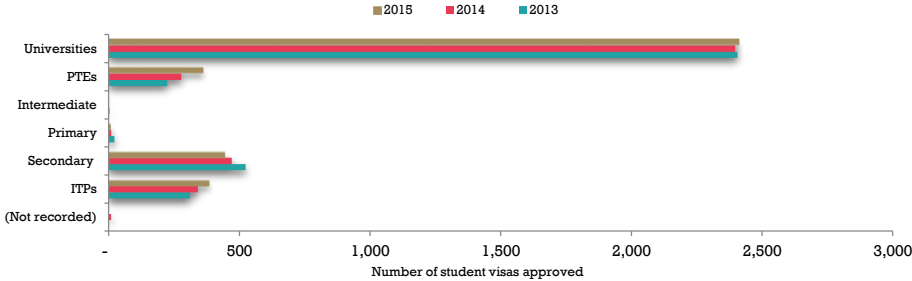
YTD top five market shifts (TSVs)



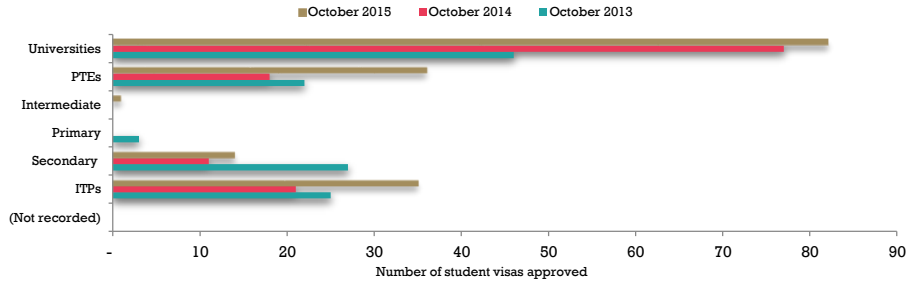
October top five market shifts (TSVs)



Otago: Total student visas issued by sector, YTD



Otago: Total student visas issued by sector, October



Top and bottom 3 regional shifts (FSVs)

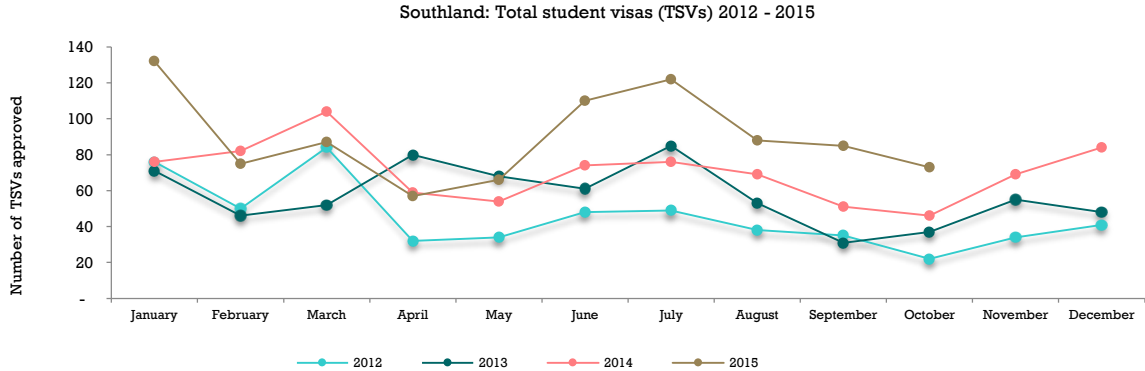
MONTH		
Country	Change (percentage)	Change (number)
Brazil	↑ 250%	5
China	↑ 38%	3
Korea	↑ 67%	2
Germany	↓ -54%	-7
Czech Republic	↓ -60%	-3
Hong Kong	↓ -75%	-3
YTD		

TOP FIVE MARKET SHIFTS (FSVs)

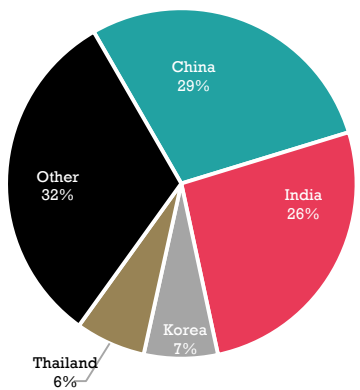
Country	Change (percentage)	Change (number)
USA	↑ 26%	109
India	↑ 67%	38
Brazil	↑ 26%	30
Thailand	↓ -36%	-36
Germany	↓ -23%	-30
Saudi Arabia	↓ -46%	-12

- Takeaways:
- Otago has been flat YTD, with a 3% (116) gain in TSVs. This was due the offsetting results between RSVs, flat at 3% (-64), and FSVs, up 12% (180).
  - The USA gained 26% (117), and India increased 40% (51) while Saudi Arabia has declined 42% (-76) and Germany declined 20% (-31) TSV YTD.

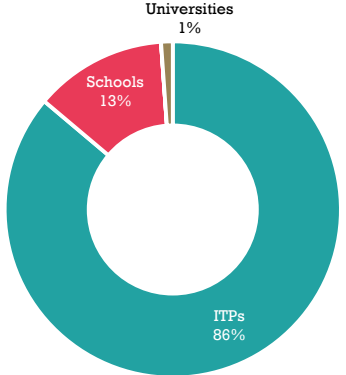
October RSV	October FSV	October TSV	YTD RSV	YTD FSV	YTD TSV
<div>↓</div> -2-13%	<div>↑</div> 2994%	<div>↑</div> 2759%	<div>↑</div> 196%	<div>↑</div> 18553%	<div>↑</div> 20430%



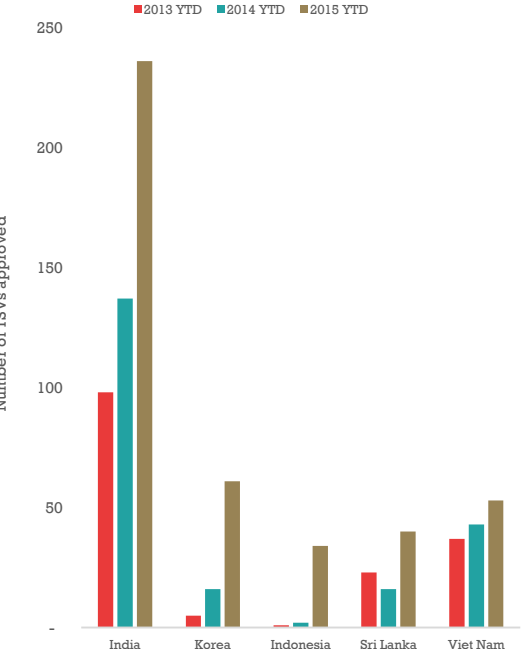
YTD 2015 country breakdown of TSVs



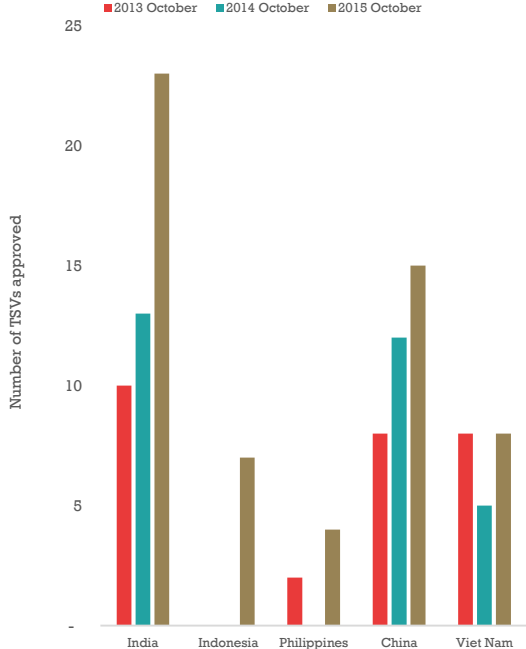
YTD 2015 sector breakdown of TSVs



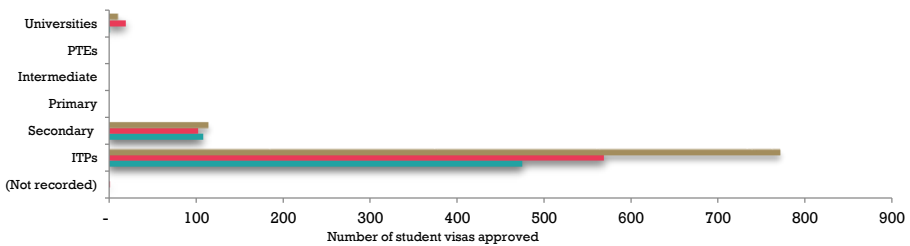
YTD top five market shifts (TSVs)



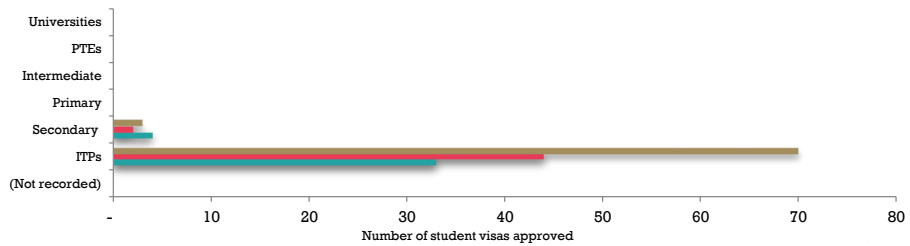
October top five market shifts (TSVs)



Southland: Total student visas issued by sector, YTD



Southland: Total student visas issued by sector, October



TOP FIVE MARKET SHIFTS (FSVs)

Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
India	↑ 109%	12
Viet Nam	↑ 600%	6
Indonesia	NA	6
Korea	↓ -67%	-4
Thailand	↓ -100%	-2
Russia	↓ -100%	-1

YTD		
Country	Change (percentage)	Change (number)
India	↑ 110%	95
Indonesia	↑ 3100%	31
Korea	↑ 290%	29
China	↓ -15%	-13
Thailand	↓ -30%	-10
Germany	↓ -18%	-5

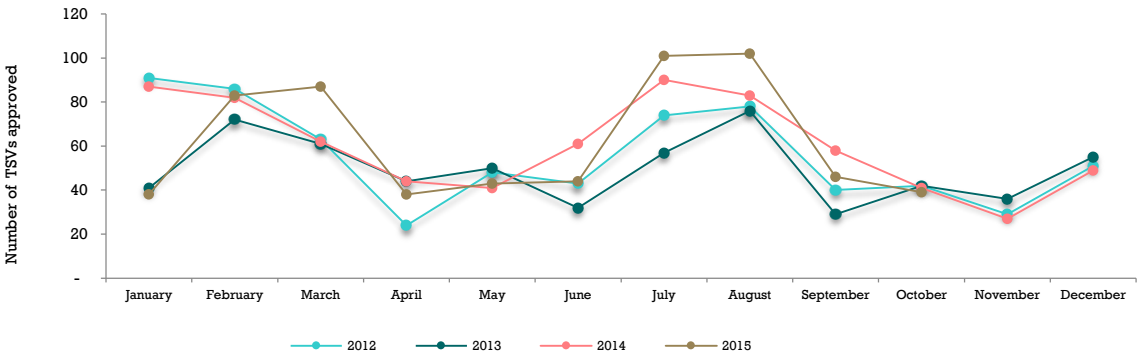
- Takeaways:
- Southland has shown strong growth YTD in TSVs, up 30% (204), and 59% (27) during October.
  - The majority of growth has come from FSVs, which have gained 53% (185) YTD and 94% (27) in October.
  - India and Korea's growth has been particularly strong, together providing an additional 144 TSVs YTD.

October RSV	October FSV	October TSV
↓ -5 -20%	↑ 3 19%	↓ -2 -5%

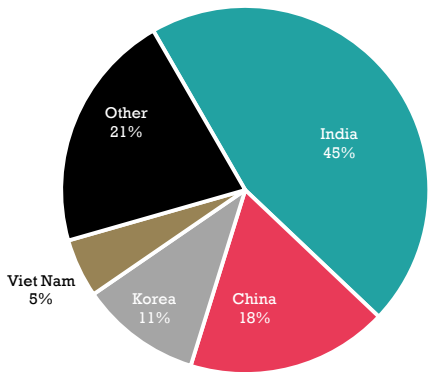
YTD RSV	YTD FSV	YTD TSV
↑ 58 16%	↓ -86 -29%	→ -28 -4%

YTD (January to October)

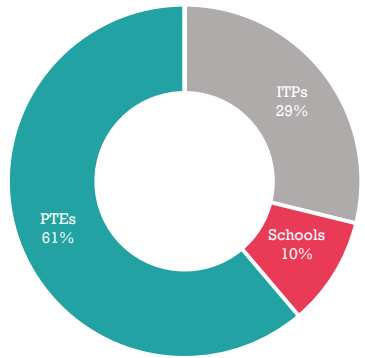
Taranaki: Total student visas (TSVs) 2012 - 2015



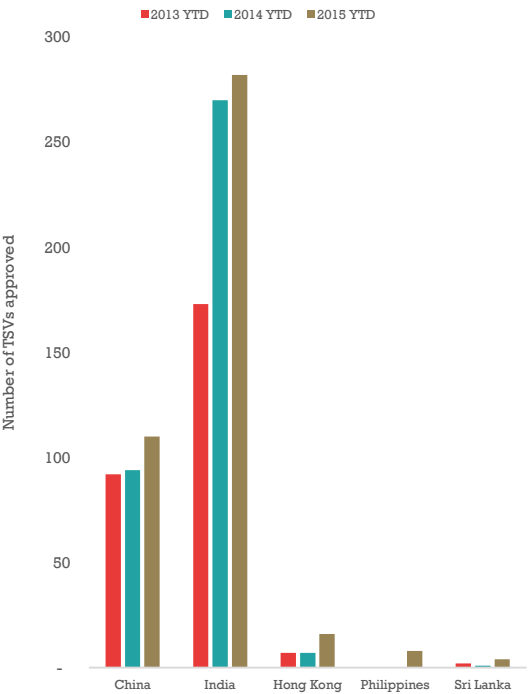
YTD 2015 country breakdown of TSVs



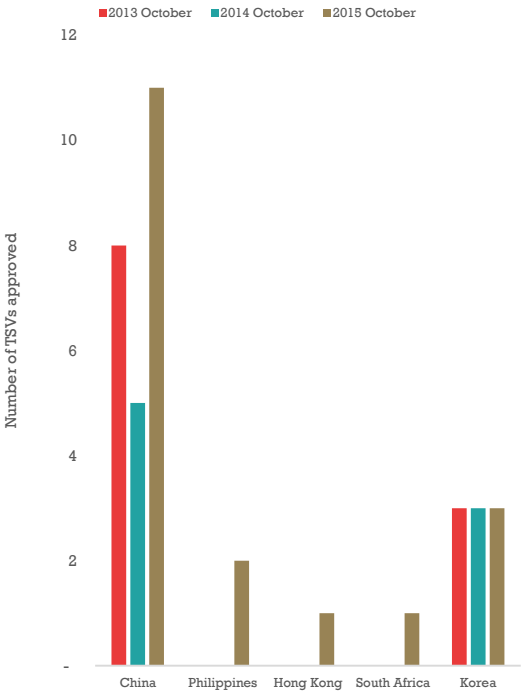
YTD 2015 sector breakdown of TSVs



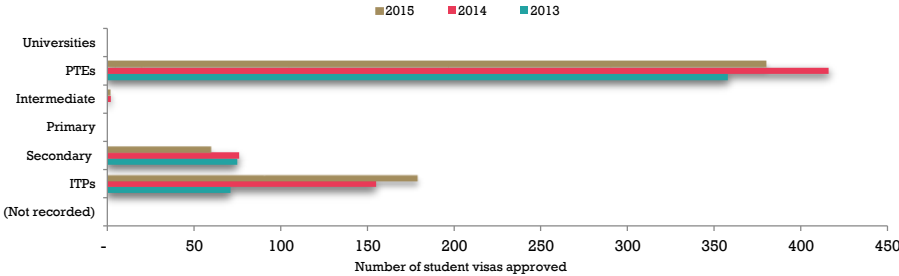
YTD top five market shifts (TSVs)



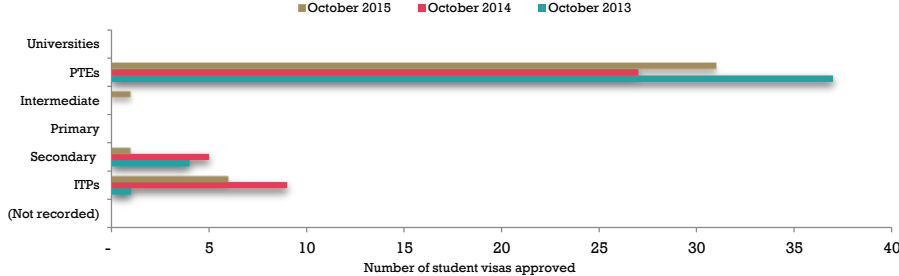
October top five market shifts (TSVs)



Taranaki: Total student visas issued by sector, YTD



Taranaki: Total student visas issued by sector, October



Top and bottom 3 regional shifts (FSVs)

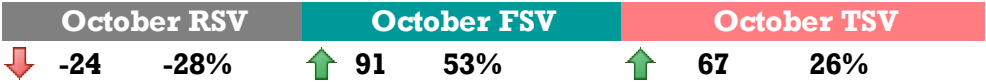
MONTH		
Country	Change (percentage)	Change (number)
India	↑ 25%	3
China	NA	1
Philippines	NA	1
Austria	↓ -100%	-1
Germany	↓ -100%	-1
Switzerland	↓ -100%	-1
YTD		

TOP FIVE MARKET SHIFTS (FSVs)

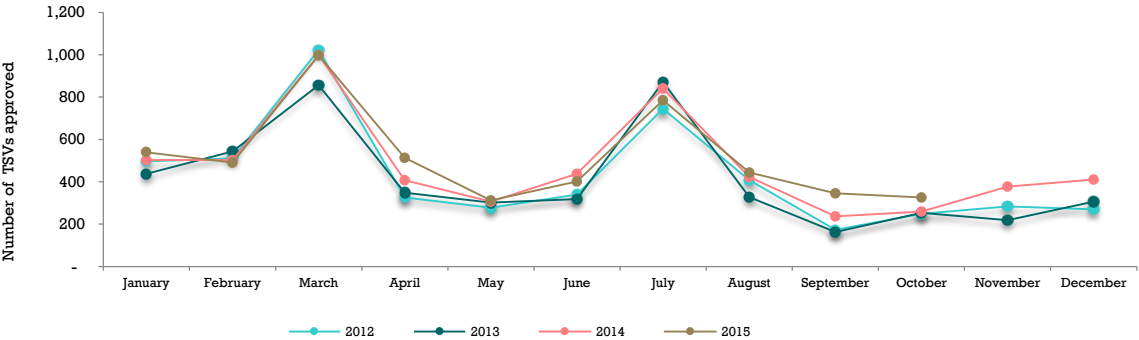
Country	Change (percentage)	Change (number)
Germany	↑ 100%	5
Philippines	NA	5
Hong Kong	NA	3
Korea	↓ -91%	-40
India	↓ -21%	-33
Viet Nam	↓ -78%	-7

Takeaways:

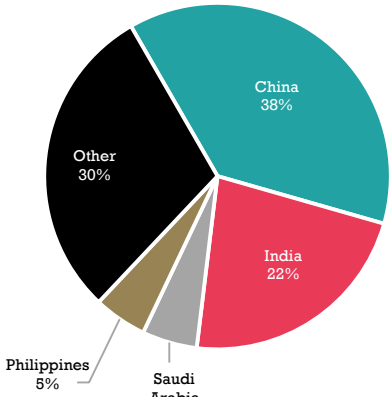
- Taranaki has tracked relatively flat, down 4% (-28). October was in decline with TSVs down by 5% (-2).
- Korea and Thailand have provided the largest declines in FSVs YTD.



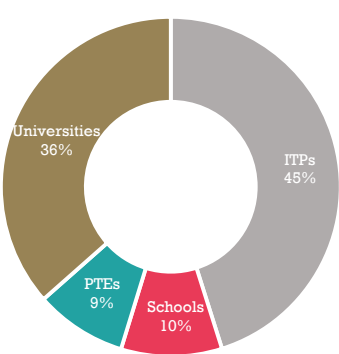
Waikato: Total student visas (TSVs) 2012 - 2015



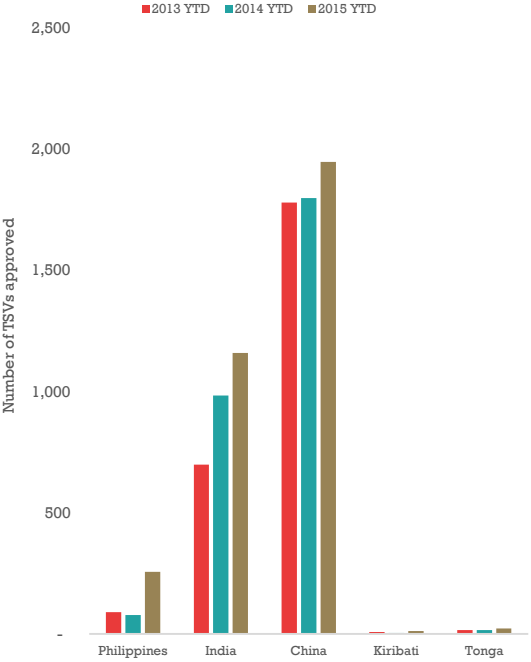
YTD 2015 country breakdown of TSVs



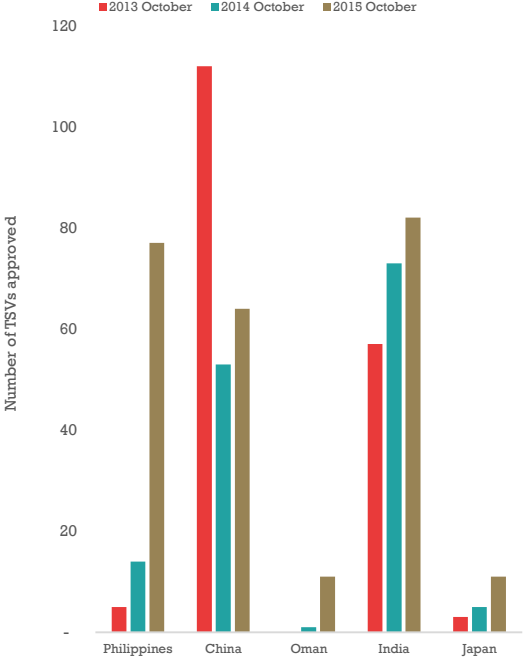
YTD 2015 sector breakdown of TSVs



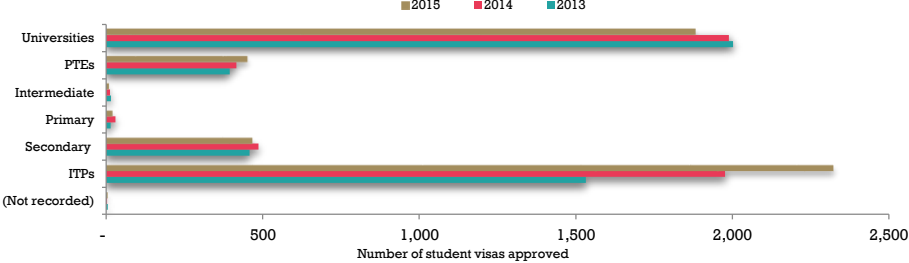
YTD top five market shifts (TSVs)



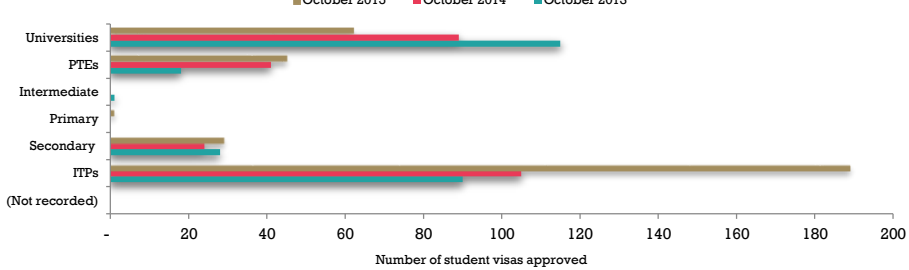
October top five market shifts (TSVs)



Waikato: Total student visas issued by sector, YTD



Waikato: Total student visas issued by sector, October



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Philippines	↑ 485%	63
China	↑ 71%	17
India	↑ 15%	10
Great Britain	↓ -43%	-9
Saudi Arabia	↓ -43%	-3
Canada	↓ -75%	-3

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
Philippines	↑ 300%	177
India	↑ 23%	144
China	↑ 16%	78
Saudi Arabia	↓ -63%	-58
Japan	↓ -34%	-43
Nepal	↓ -53%	-31

Takeaways:

- Waikato's TSVs are, up 5% (240) YTD. October was strong, with a TSV gain of 26% (67), driven by positive results in FSVs, up 53% (91).
- The Philippines grew particularly strongly during October, up 485% (63) in FSVs. Major FSV decreases YTD came from Saudi Arabia, Japan, and Nepal.



# Wellington:

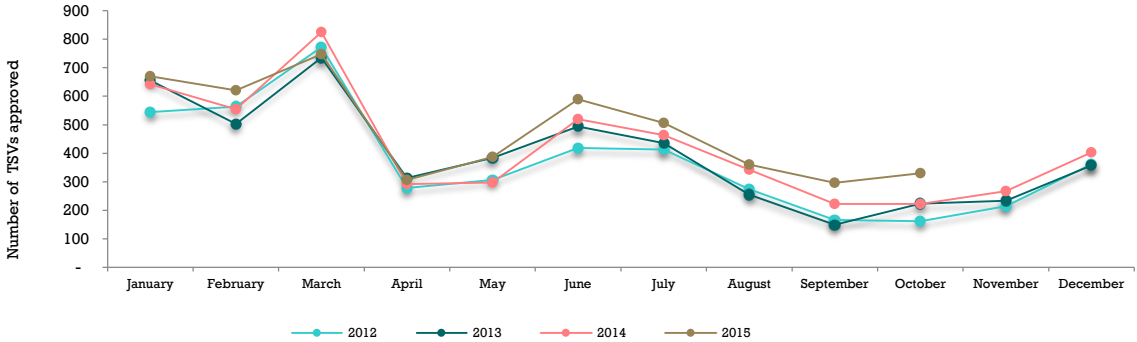


October RSV	October FSV	October TSV
↑ 71 93%	↑ 37 25%	↑ 108 49%

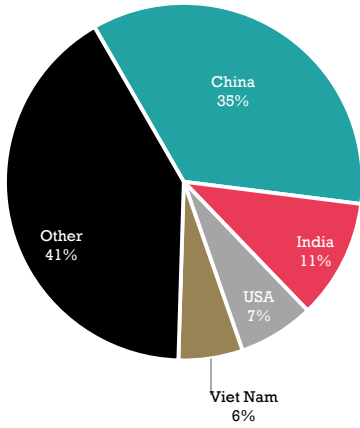
YTD RSV	YTD FSV	YTD TSV
→ 79 3%	↑ 353 17%	↑ 432 10%

YTD (January to October)

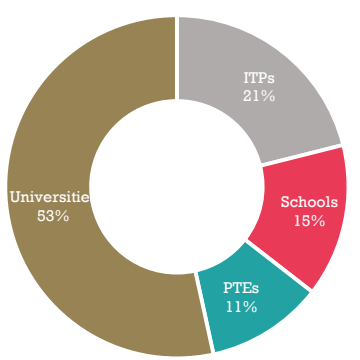
Wellington: Total student visas (TSVs) 2012 - 2015



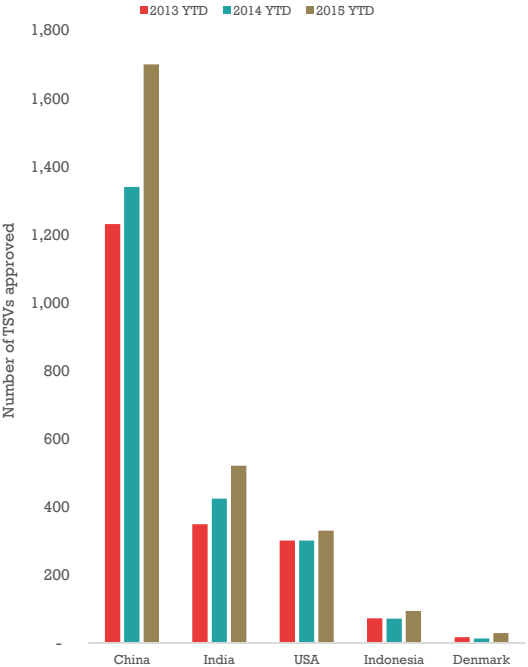
YTD 2015 country breakdown of TSVs



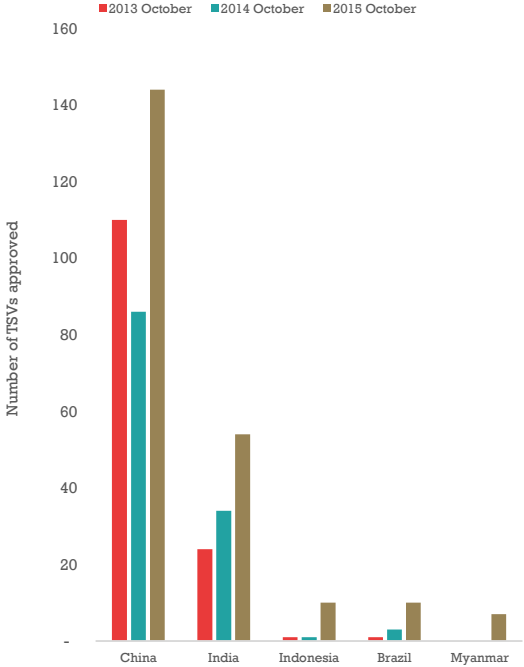
YTD 2015 sector breakdown of TSVs



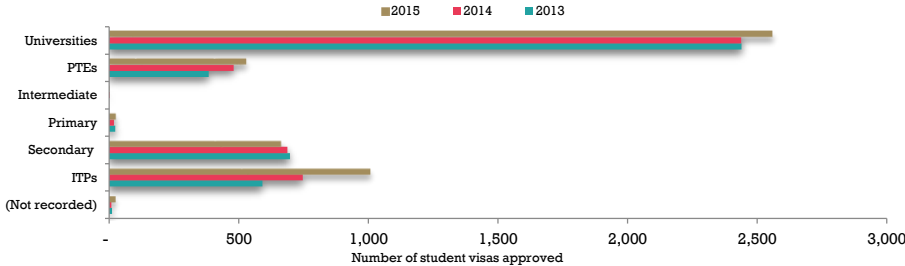
YTD top five market shifts (TSVs)



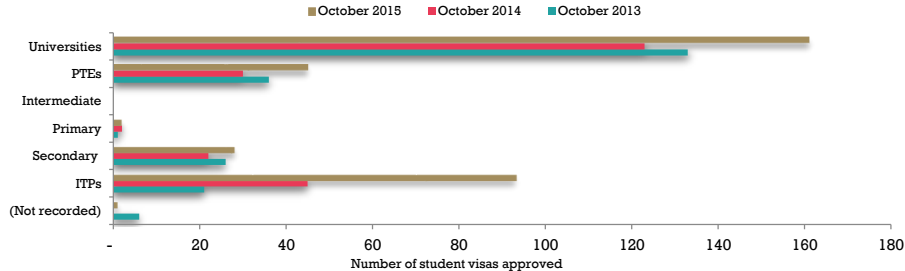
October top five market shifts (TSVs)



Wellington: Total student visas issued by sector, YTD



Wellington: Total student visas issued by sector, October



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
China	↑ 36%	15
India	↑ 45%	13
Myanmar	NA	7
USA	↓ -75%	-12
Sri Lanka	↓ -100%	-3
Korea	↓ -40%	-2

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
China	↑ 34%	134
India	↑ 29%	75
Malaysia	↑ 162%	42
Brazil	↓ -34%	-45
Germany	↓ -25%	-32
France	↓ -43%	-16

## Takeaways:

- Wellington has shown steady growth in TSVs YTD, up 10% (432). October results have been very positive, with TSV gains of 49% (108), driven by positive results in both RSVs and FSVs.
- YTD major FSV increases have come from China 34% (134), India, 29% (75) and Malaysia, 162% (42).



# Overall: Sector overview





# Universities:

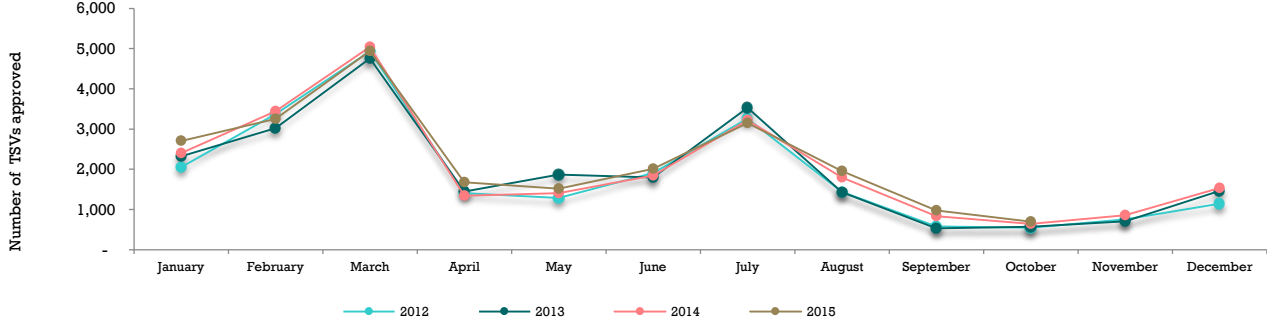


October RSV				October RSV				October RSV			
↑	19	6%	↑	35	10%	↑	54	8%	↑	54	8%

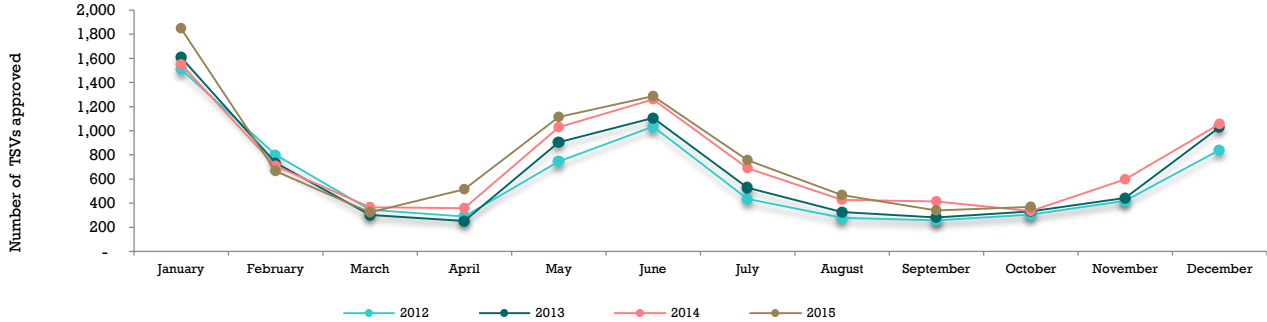
YTD RSV				YTD FSV				YTD TSV			
→	356	2%	↑	547	8%	→	903	4%	→	903	4%

YTD (January to October)

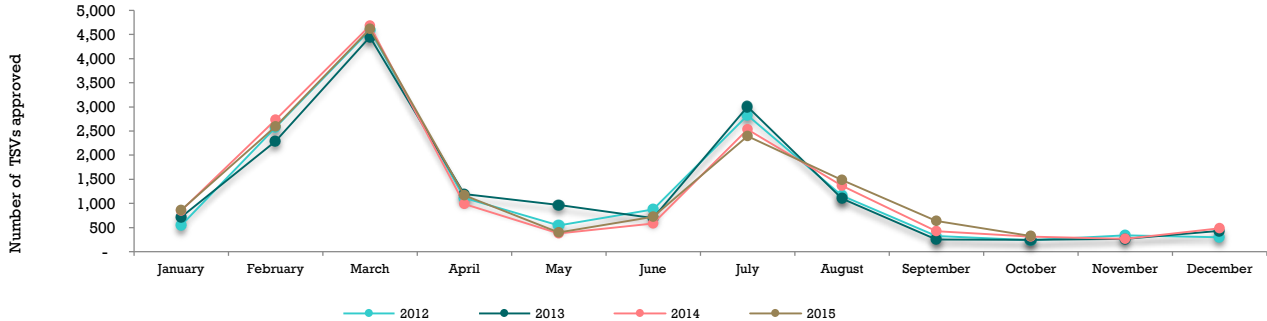
Universities: Total student visas (TSVs) 2012 - 2015



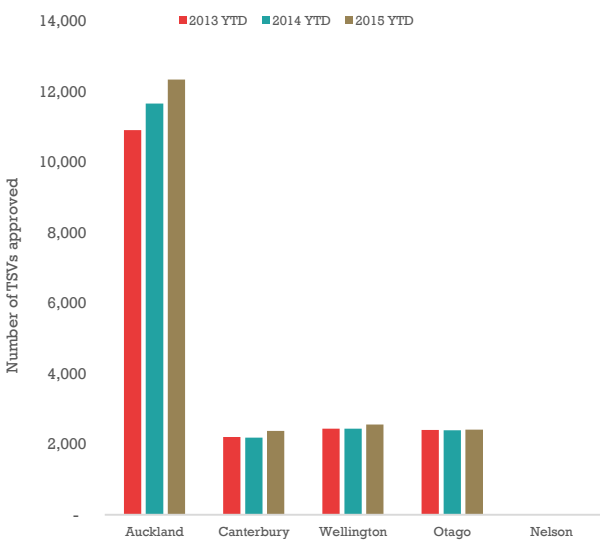
Universities: First time student visas (FSVs) 2012 - 2015



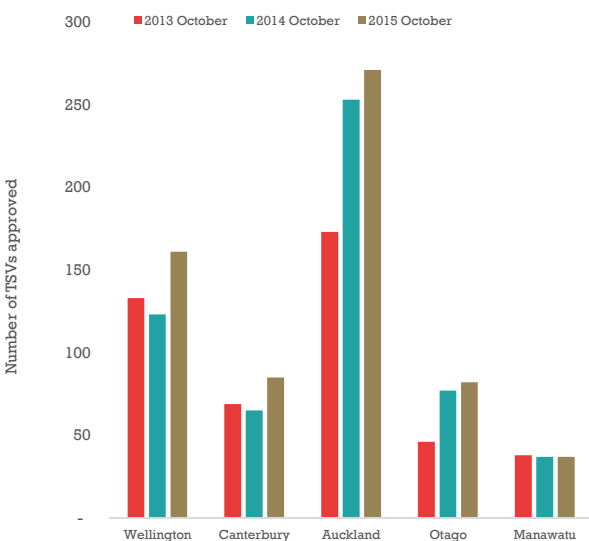
Universities: Returning student visas (RSVs) 2012 - 2015



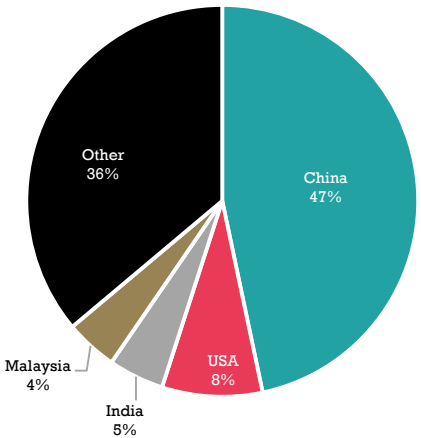
YTD top five regional changes (TSVs)



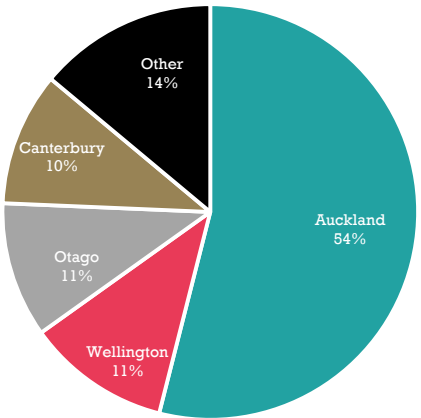
October top five regional changes (TSVs)



YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



## Takeaways:

- Universities have been flat during 2015. October results have been positive, with TSVs up 8% (54).
- Universities have received 29% of TSVs YTD.
- China and the USA continue to show strong growth, up 10% (969) and 18% (290) TSVs YTD.

# Private Training Establishments (PTE):



October RSV		
↑	537	62%

October RSV		
↑	418	28%

October RSV		
↑	955	40%

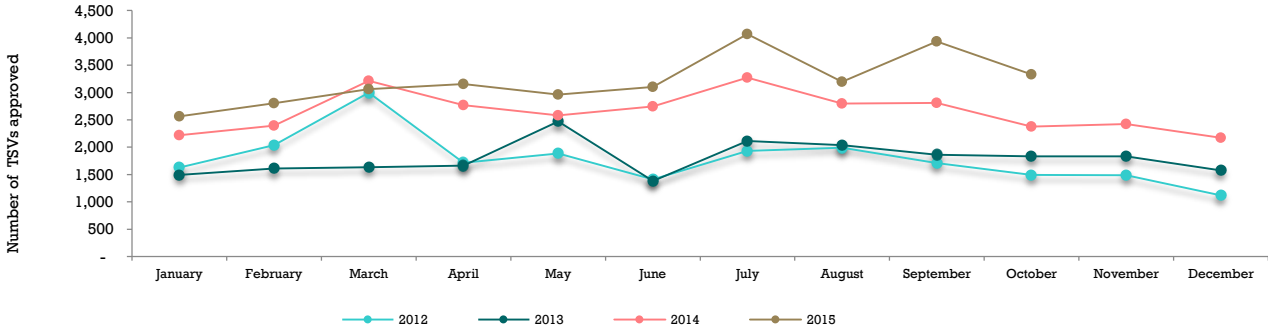
YTD RSV		
↑	3,404	30%

YTD FSV		
↑	1,599	10%

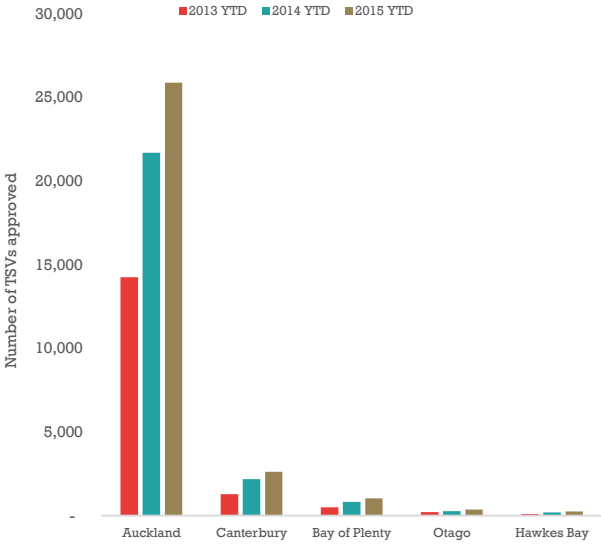
YTD TSV		
↑	5,003	18%

YTD (January to October)

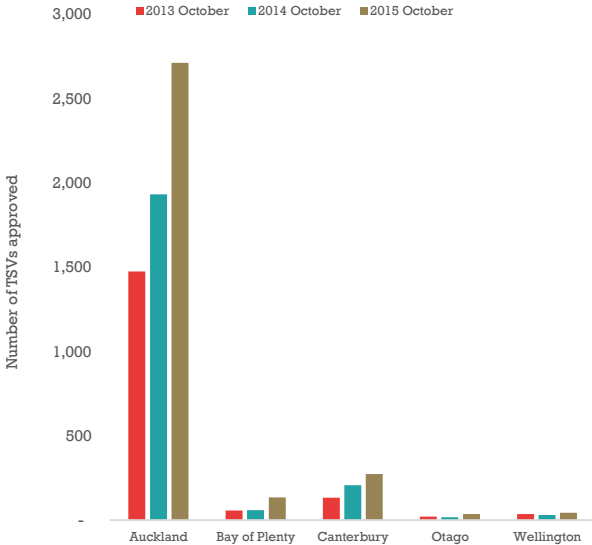
PTEs: Total student visas (TSVs) 2012 - 2015



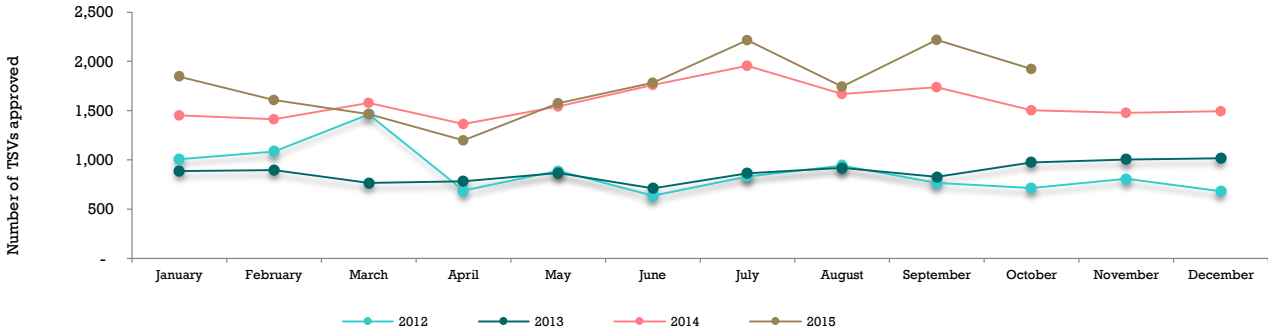
YTD top five regional changes (TSVs)



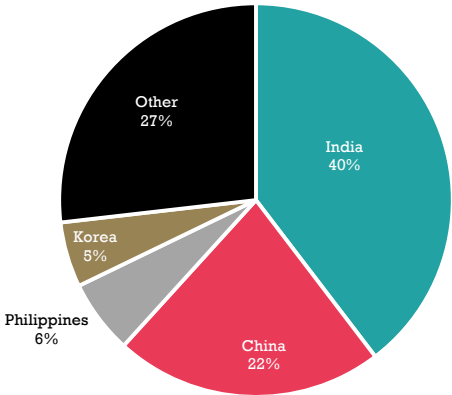
October top five regional changes (TSVs)



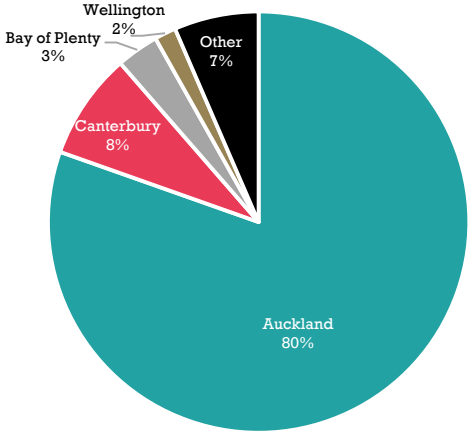
PTEs: First time student visas (FSVs) 2012 - 2015



YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



- Takeaways:
- YTD TSVs continue to experience strong growth, up 18% (5,003) and FSVs up 10% (1,599).
  - October results have been particularly positive, with TSVs up 40% (955).
  - Auckland PTEs have received 80% of TSVs YTD.



# Institutes of Technology and Polytechnics (ITPs):

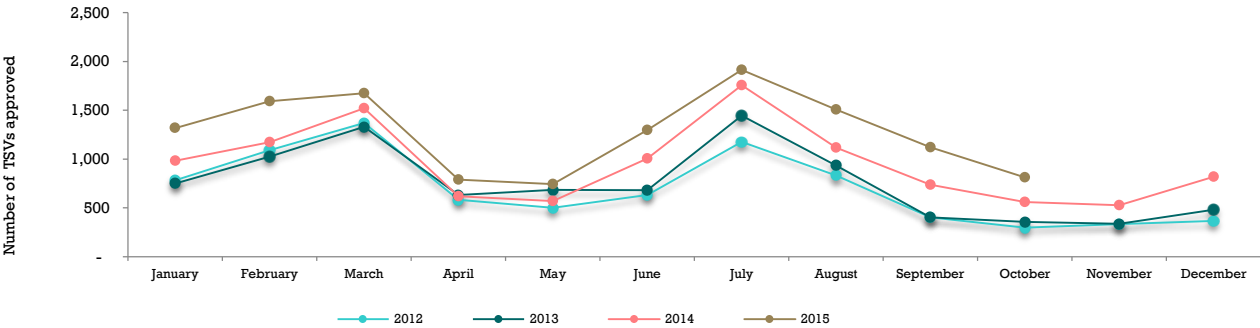


October RSV		October RSV		October RSV	
↑	85 52%	↑	169 43%	↑	254 45%

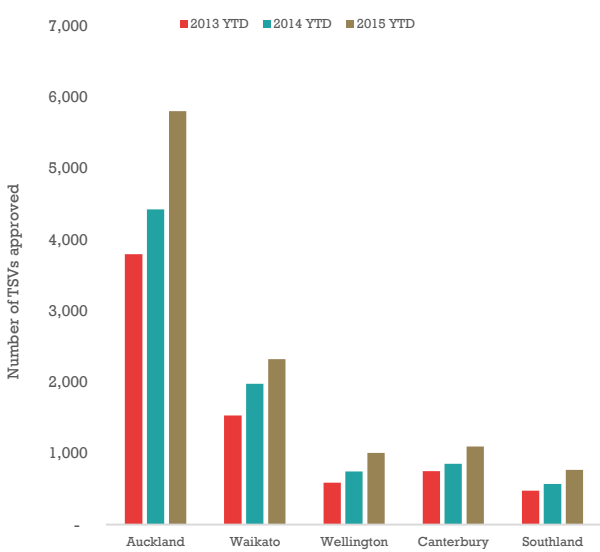
YTD RSV			YTD FSV			YTD TSV		
↑	777	14%	↑	1,950	44%	↑	2,727	27%

YTD (January to October)

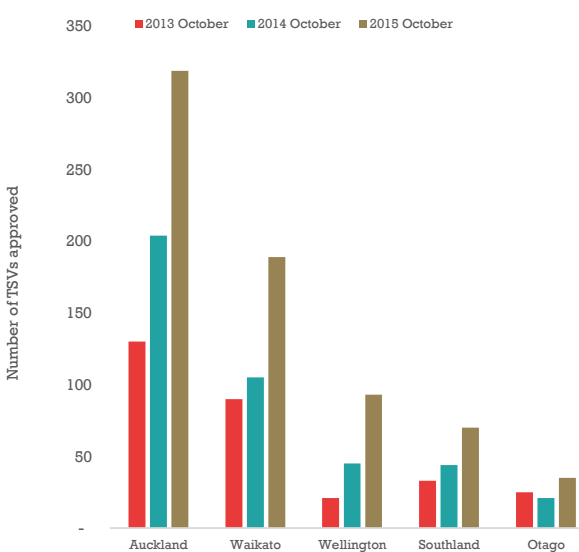
ITPs: Total student visas (TSVs) 2012 - 2015



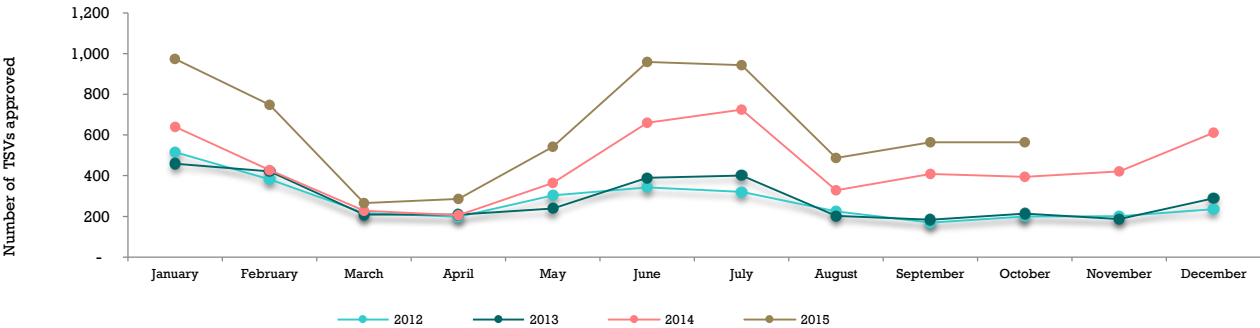
YTD top five regional changes (TSVs)



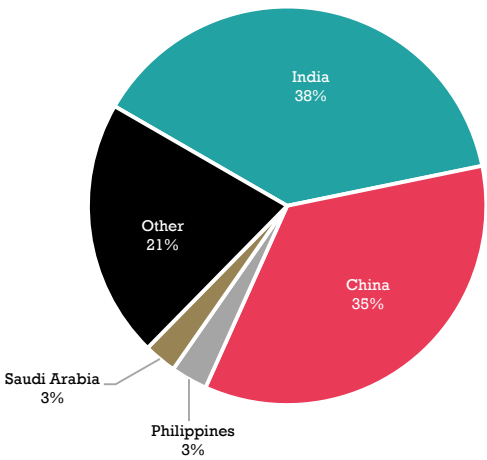
October top five regional changes (TSVs)



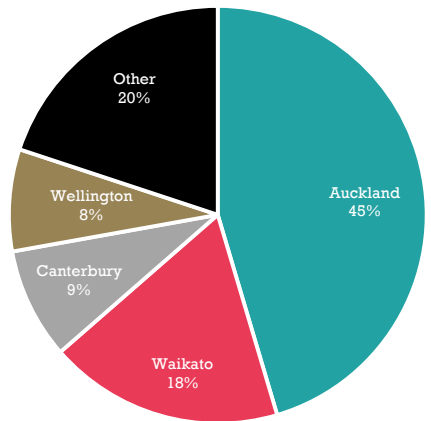
ITPs: First time student visas (FSVs) 2012 - 2015



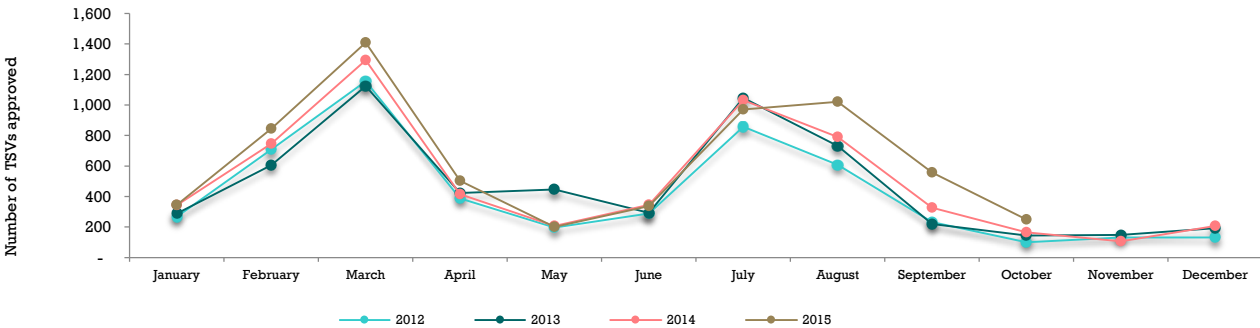
YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



ITPs: Returning student visas (RSVs) 2012 - 2015



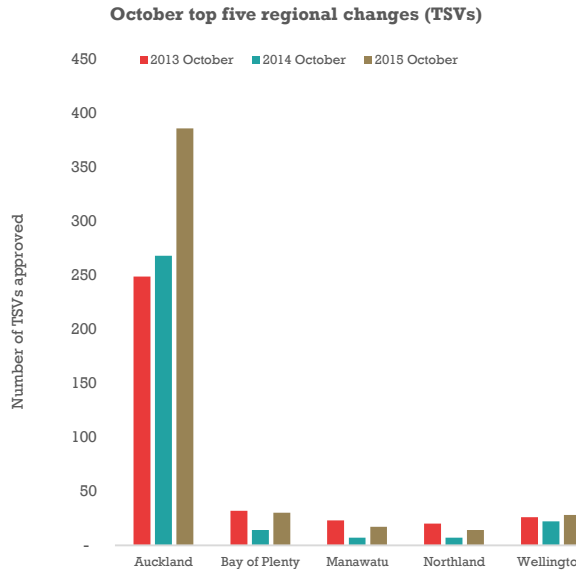
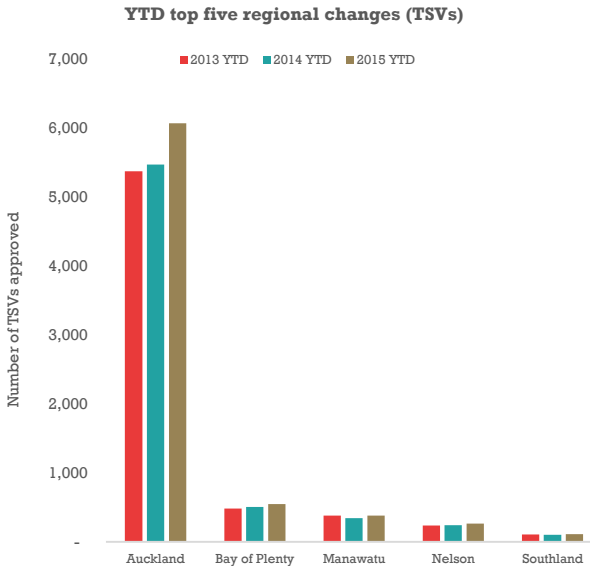
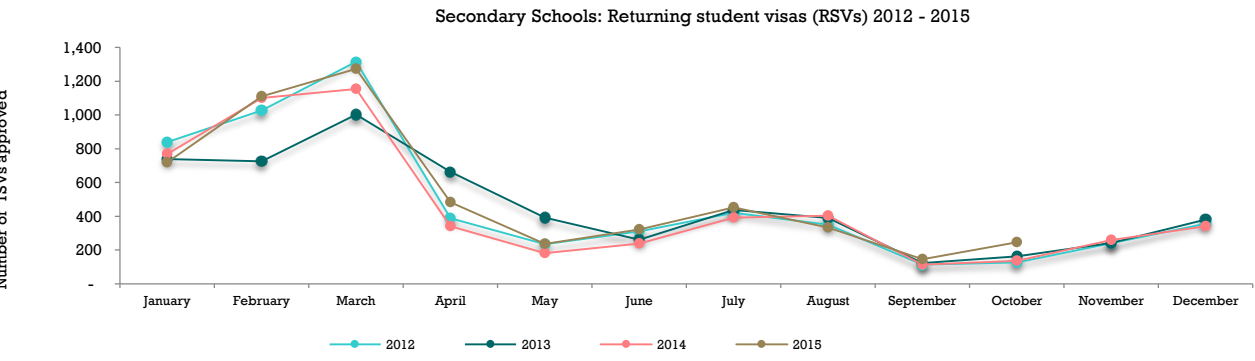
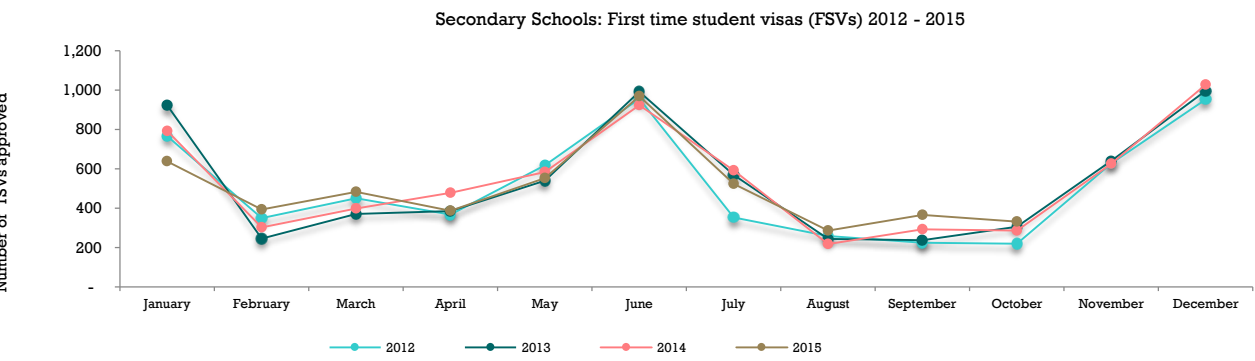
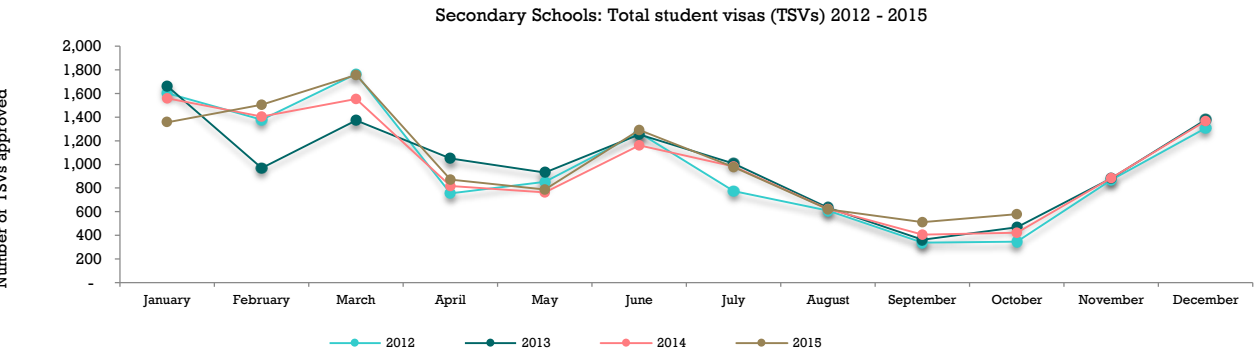
## Takeaways:

- ITPs have grown particularly strongly YTD, up 27% (2,727).
- October was a strong month, with FSVs increasing 43% (169) and TSV up 45% (254).
- The top four regions (Auckland, 45%; Waikato, 18%; Canterbury, 9%; and Wellington, 8%) together comprise 80% of YTD TSVs.

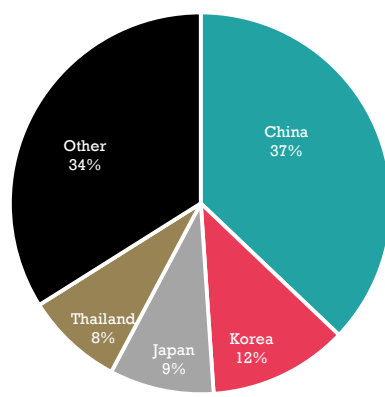
# Secondary schools:



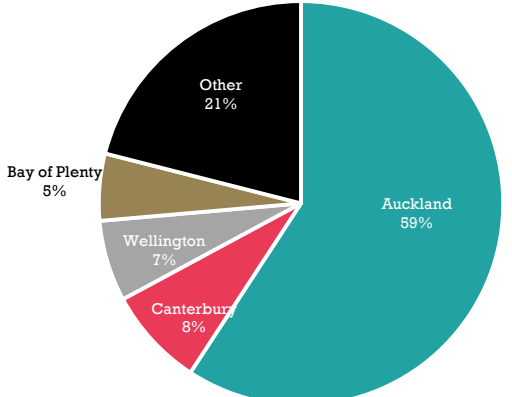
October RSV			October RSV			October RSV			YTD RSV			YTD FSV			YTD TSV		
↑	111	82%	↑	45	16%	↑	156	37%	↑	496	10%	→	63	1%	↑	559	6%



YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



## Takeaways:

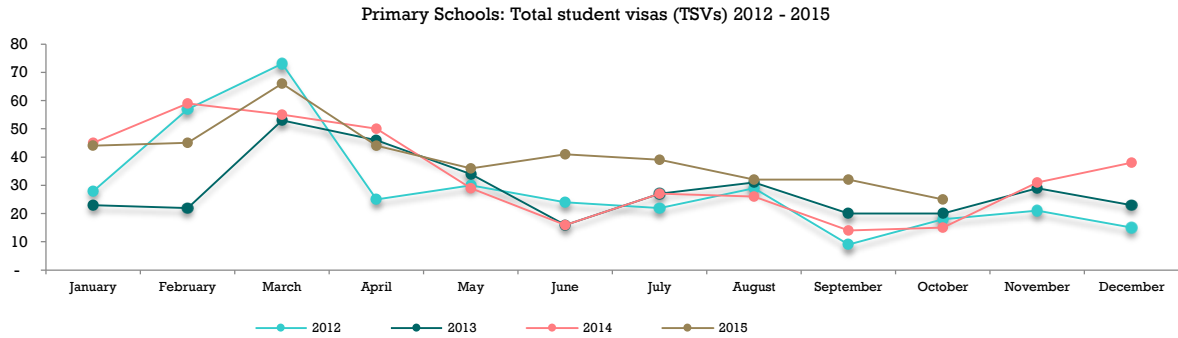
- Secondary schools YTD TSVs up 6% (559) while FSV are flat 1% (63).
- The top four regions (Auckland, 59%; Canterbury, 8%; Wellington, 7%; and the Bay of Plenty, 5%) together comprise approximately 79% of YTD TSVs.
- China is the largest contributor of TSVs YTD, with 37% of total.

# Primary Schools:

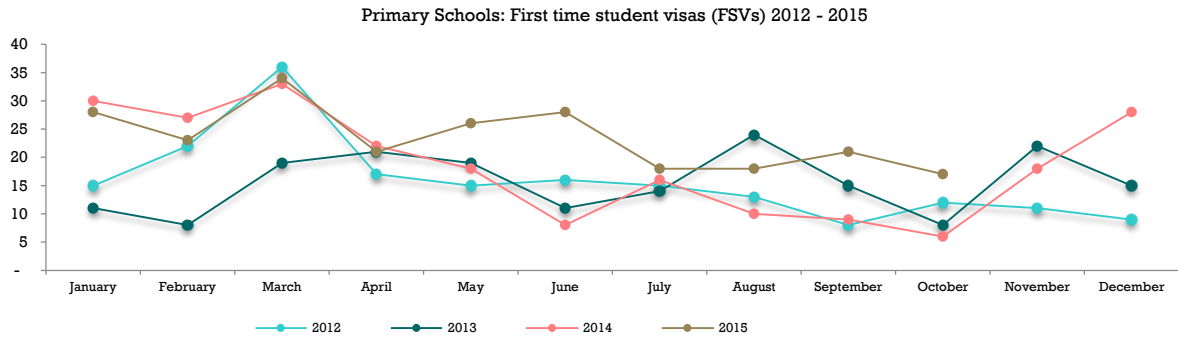


October RSV		October RSV		October RSV		YTD RSV		YTD FSV		YTD TSV		YTD (January to October)	
↓	-1	-11%	↑ 11	183%	↑ 10	67%	↑ 13	8%	↑ 55	31%	↑ 68	20%	

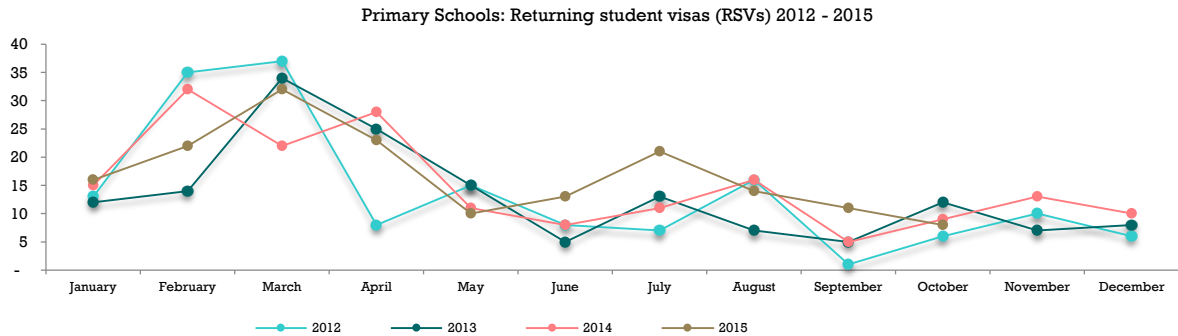
Number of TSVs approved



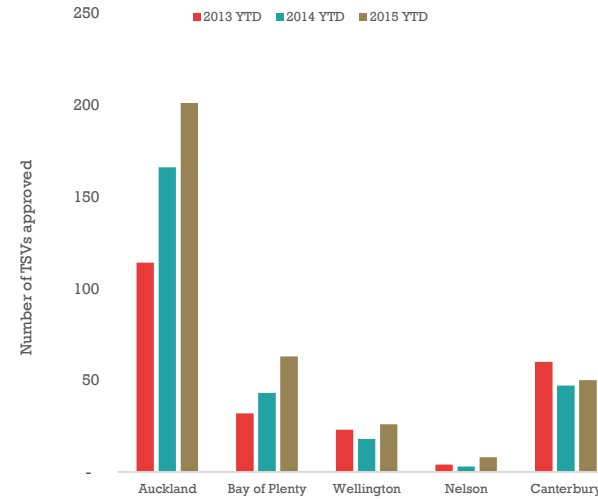
Number of TSVs approved



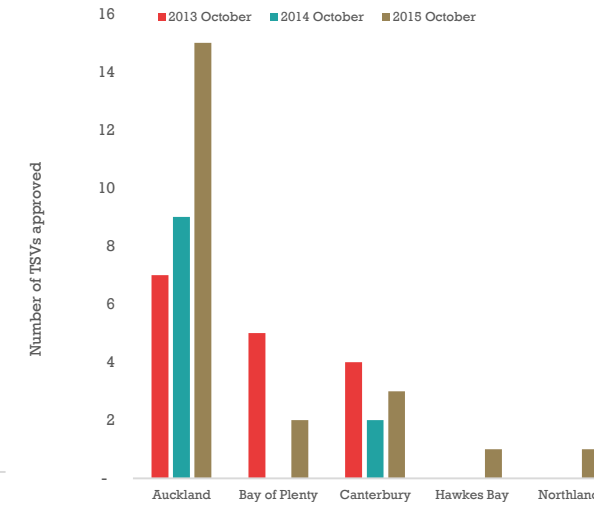
Number of TSVs approved



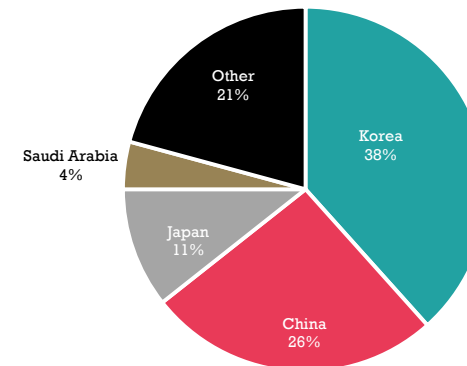
YTD top five regional changes (TSVs)



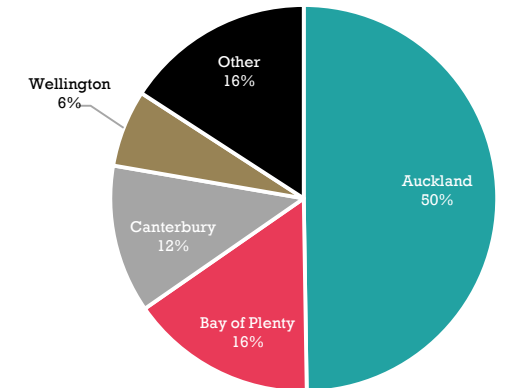
October top five regional changes (TSVs)



YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



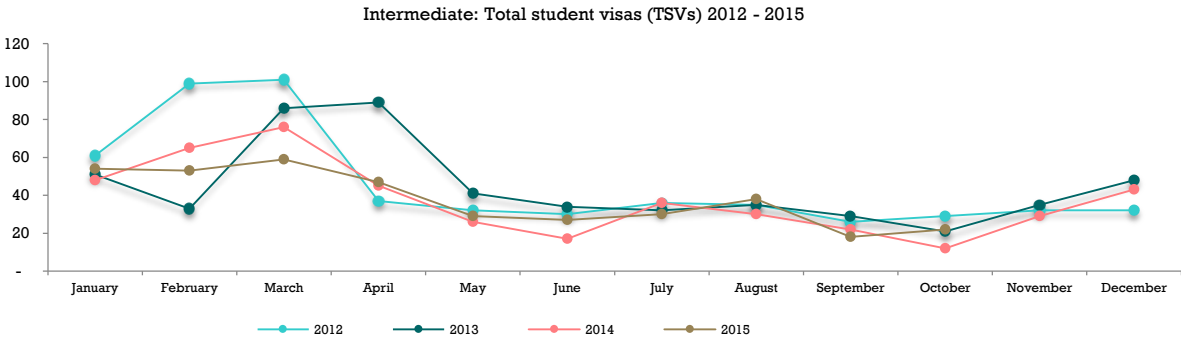
- Takeaways:
- Primary schools have tracked positively during 2015, up 20% (68) YTD. October results have been positive, with TSVs up 67% (10).
  - Auckland has 50% of all TSVs YTD, the Bay of Plenty has 16%, and Canterbury comprises 12%.
  - Korea is the largest market for primary schools, comprising 38% of TSVs YTD; followed by China, with 26% of TSVs YTD.

# Intermediate schools:

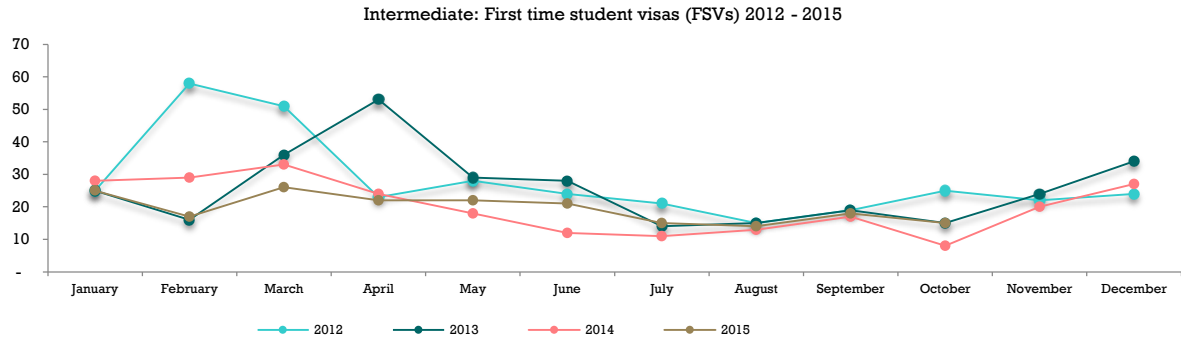


October RSV		October RSV		October RSV		YTD RSV		YTD FSV		YTD TSV	
↑	3	75%	↑	7	88%	↑	10	83%	→	-2	-1%
						→	2	1%	→	0	0%

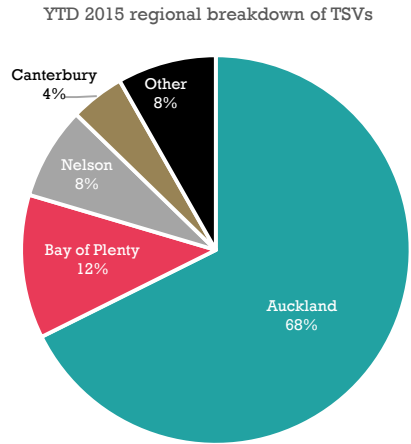
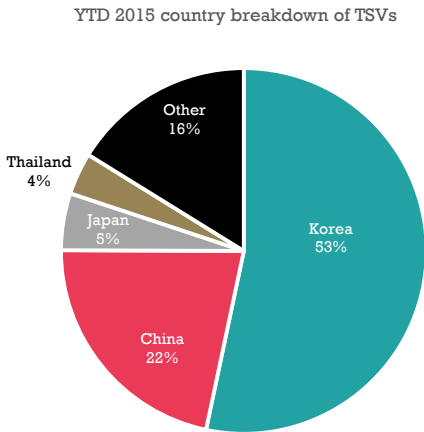
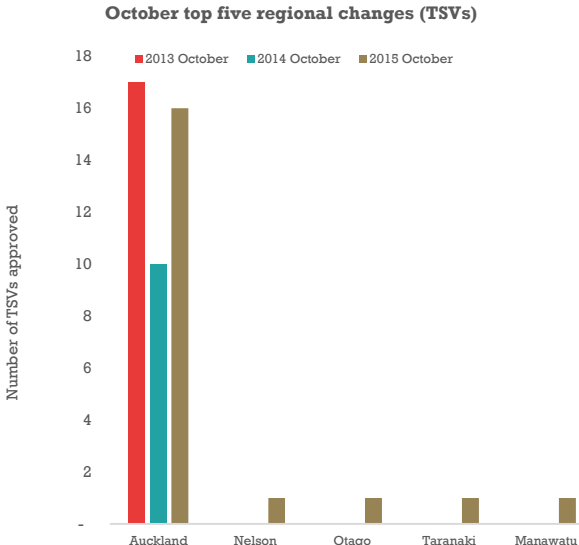
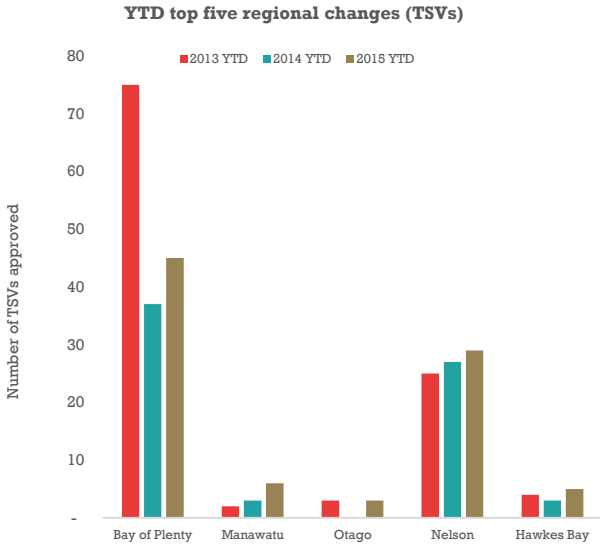
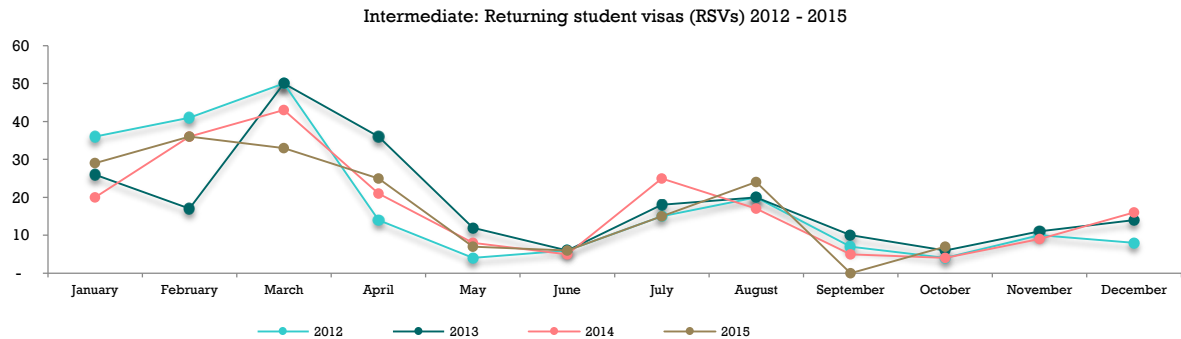
Number of TSVs approved



Number of TSVs approved



Number of TSVs approved



- Takeaways:
- Intermediate schools have been flat during 2015 YTD. October results have been positive, with TSVs up 83% (10).
  - Auckland has captured 68% of TSVs YTD, followed by the Bay of Plenty with 12% and Nelson with 8%.
  - Korea has contributed 53% of all YTD TSVs.