

# Student Visa Dashboard Full-year 2015

Regional and sector overview





# Introduction

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- *The Regional Student Visa 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

- **Measure:**
  - The Dashboard measures the volume of student visas approved between 1 January to the end of the month specified on the cover page.
- **Student visas vs. visitor visas:**
  - Total student visas (TSV), first time student visas (FSV), and renewed student visas (RSV) only capture students who enter New Zealand with a student visa. These students are mostly those who are planning to study for more than three months.
  - Students who undertake a course less than three months are not required to enter on a student visa. Students who do choose to enter on a visitor visa (usually from visa-free nationalities) are not captured in this dashboard.
  - This will impact the Private Training Establishments (including English Language Schools) numbers.
- **Student visas vs. enrolments:**
  - There is potential delay of up to three months between students having their visas approved and actual entry into New Zealand, therefore the figures shown here may not necessarily represent the actual number of students currently in New Zealand.
- **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
    - Understanding the correlation between ENZ activity and policy changes on FSV trends
    - Understanding the impact of RSV on overall trends
    - Further work is being undertaken to understand a relatively large number of "not recorded" entries for FSVs at the provider level
    - Further analysis is being undertaken on understanding the correlation between student visas and enrolments



# Key trends

## Full-year 2015

- Growth in total student visas (TSV) was driven by Auckland (up 14%), Canterbury (up 15%), Wellington (up 12%) and the Bay of Plenty (up 20%) regions.
- Growth in the Auckland and Canterbury regions have been driven by the PTE sector (up 18% and 19%) in 2015.
- 2015 was a strong year for student visa approvals with an additional 10,407 TSV approved a 13% increase when compared to 2014. First time student visas (FSV) accounted for 45% of this increase with FSVs up 12% (4,653) on 2014.
- The ITPs, PTEs, and universities have experienced the strongest growth in FSVs in 2015, up 36% (1,924), 9% (1,284), and 11% (934).

## December

- December total student visa approvals increased by 13% (770) and 9% (385) in FSVs on 2014.
- December TSV growth was driven by Auckland (up 5%), Wellington (up 41%) and Canterbury (up 24%).
- Secondary schools, universities and ITPs experienced growth in December TSVs while PTEs, primary and intermediate schools TSVs declined.

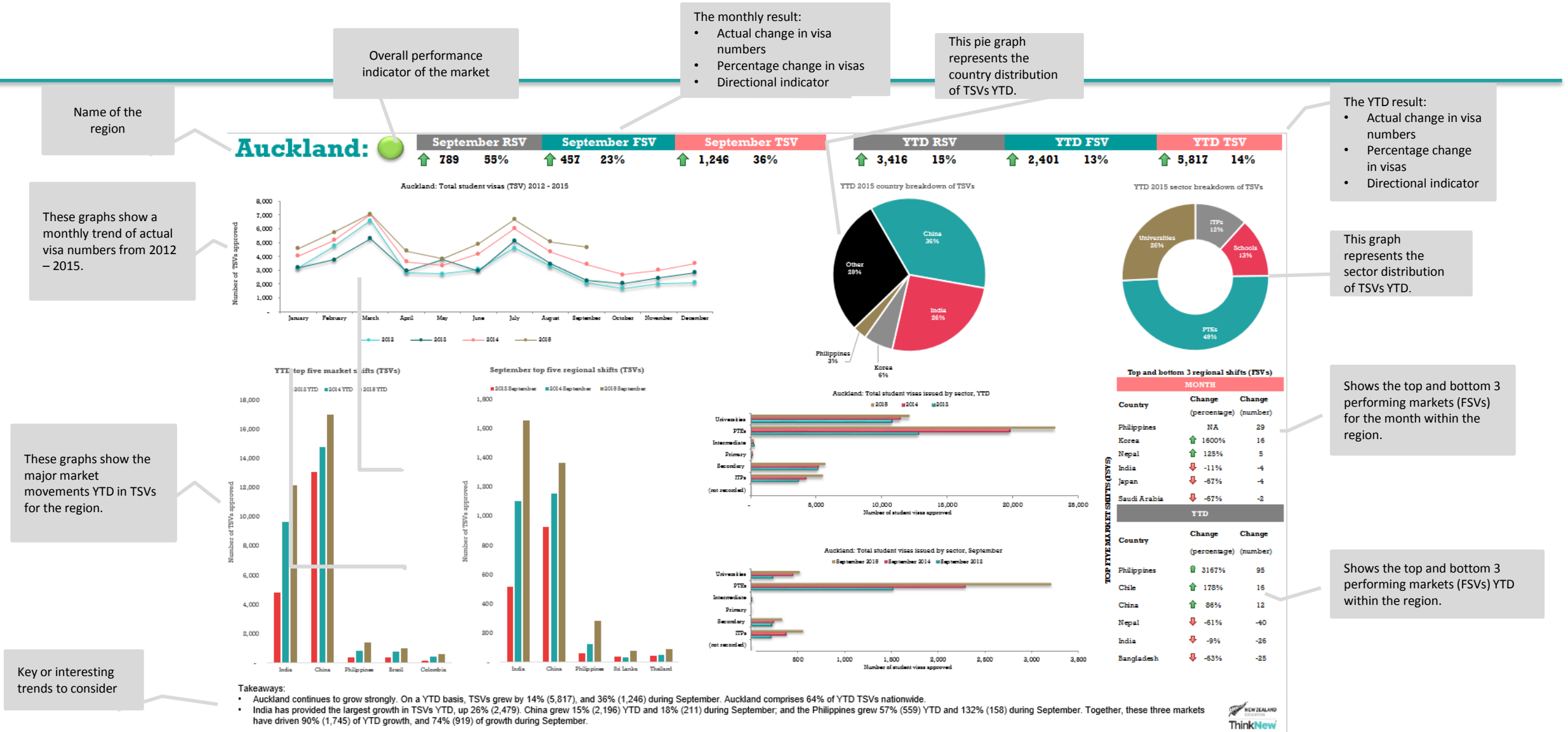
Increases	TSVs for December	Change	% change
	Auckland	189	5%
	Wellington	165	41%
	Canterbury	149	24%
	Otago	117	37%
	Bay of Plenty	43	23%
Decreases	Taranaki	-14	-29%
	Waikato	-26	-6%

FSVs for December	Change	% change
Wellington	160	9%
Otago	115	52%
Canterbury	105	49%
Northland	31	70%
Bay of Plenty	29	22%
Manawatu	15	13%
Taranaki	-11	-33%
Waikato	-68	-20%

Sector TSVs for December	Change	% change
Secondary	392	29%
Universities	336	22%
ITPs	79	10%
Intermediate	-2	-5%
Primary	-11	-29%
PTEs	-22	-1%

Sector FSVs for December	Change	% change
Universities	291	28%
Secondary	281	27%
Intermediate	-1	-4%
ITPs	-8	-1%
Primary	-13	-46%
PTEs	-161	-11%

# How to read the dashboard



# Overall YTD regional performance

(Listed in order of 2015 volume)

Indicator	YTD TSVs	2014	2015	Change in numbers	% change
●	Auckland	50,214	57,362	7,148	14%
●	Canterbury	7,175	8,244	1,069	15%
●	Waikato	5,701	5,959	258	5%
●	Wellington	5,051	5,643	592	12%
●	Otago	3,978	4,310	332	8%
●	Manawatu	2,598	2,596	-2	0%
●	Bay of Plenty	1,801	2,162	361	20%
●	Southland	844	1,073	229	27%
●	Nelson	920	1,067	147	16%
●	Hawke's Bay	752	853	101	13%
●	Taranaki	725	668	-57	-8%
●	Undefined	387	565	178	46%
●	Northland	458	506	48	10%
●	Gisborne	32	26	-6	-19%
●	Marlborough	6	15	9	150%
●	<b>Grand Total</b>	<b>80,655</b>	<b>91,062</b>	<b>10,407</b>	<b>13%</b>

Indicator	YTD FSVs	2014	2015	Change in numbers	% change
●	Auckland	24,550	27,296	2,746	11%
●	Canterbury	3,742	4,252	510	14%
●	Wellington	2,546	3,042	496	19%
●	Waikato	2,853	3,012	159	6%
●	Otago	1,908	2,269	361	19%
●	Bay of Plenty	1,123	1,237	114	10%
●	Manawatu	1,072	1,074	2	0%
●	Nelson	688	737	49	7%
●	Southland	458	643	185	40%
●	Hawke's Bay	455	490	35	8%
●	Undefined	303	416	113	37%
●	Northland	355	335	-20	-6%
●	Taranaki	336	236	-100	-30%
●	Marlborough	4	12	8	200%
●	Gisborne	14	10	-4	-29%
●	<b>Grand Total</b>	<b>40,418</b>	<b>45,071</b>	<b>4,653</b>	<b>12%</b>

# Overall YTD market performance

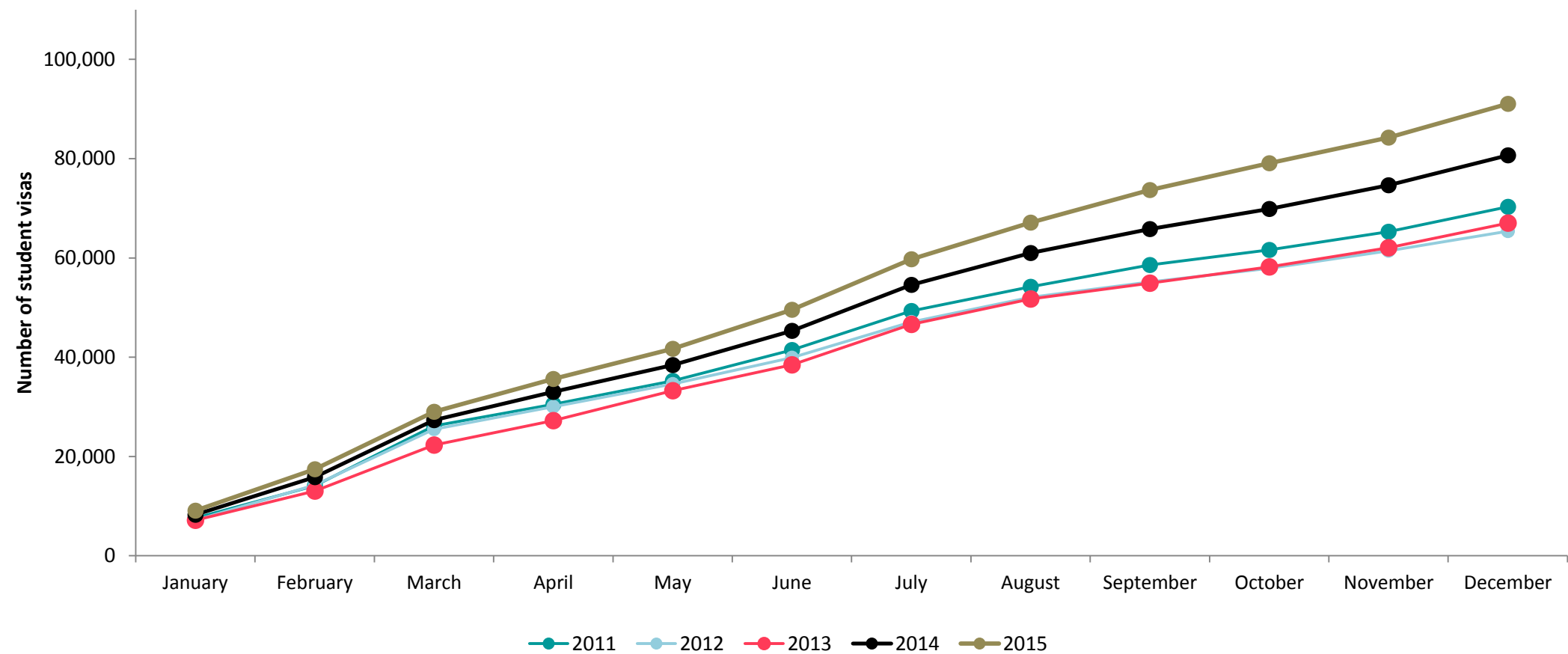
(Listed in order of 2015 volume)

Indicator	YTD TSVs	2014	2015	Change in numbers	% change
●	China	25,698	29,640	3,942	15%
●	India	17,534	21,093	3,559	20%
●	Korea	4,923	4,864	-59	-1%
●	Japan	3,433	3,544	111	3%
●	USA	2,168	2,824	656	30%
●	Philippines	1,419	2,626	1,207	85%
●	Thailand	2,243	2,381	138	6%
●	Saudi Arabia	2,564	2,044	-520	-20%
●	Brazil	1,576	1,933	357	23%
●	Germany	1,877	1,769	-108	-6%
●	Viet Nam	1,699	1,660	-39	-2%
●	Malaysia	1,383	1,453	70	5%
●	Hong Kong	1,110	1,166	56	5%
●	Colombia	734	942	208	28%
●	Sri Lanka	695	928	233	34%
●	Taiwan	849	846	-3	0%
●	Fiji	899	831	-68	-8%
●	Nepal	798	775	-23	-3%
●	Indonesia	654	757	103	16%
●	Russia	635	634	-1	0%
●	<b>Grand Total</b>	<b>80,655</b>	<b>91,062</b>	<b>10,407</b>	<b>13%</b>

Indicator	YTD FSVs	2014	2015	Change in numbers	% change
●	India	12,260	12,840	580	5%
●	China	7,722	9,032	1,310	17%
●	USA	1,846	2,521	675	37%
●	Philippines	1,183	2,376	1,193	101%
●	Japan	2,026	2,155	129	6%
●	Korea	1,999	2,024	25	1%
●	Brazil	1,355	1,617	262	19%
●	Germany	1,618	1,538	-80	-5%
●	Thailand	1,113	1,076	-37	-3%
●	Colombia	597	712	115	19%
●	Viet Nam	551	620	69	13%
●	Malaysia	417	564	147	35%
●	Sri Lanka	299	541	242	81%
●	Chile	356	451	95	27%
●	Great Britain	386	424	38	10%
●	Nepal	602	364	-238	-40%
●	Indonesia	303	355	52	17%
●	France	367	354	-13	-4%
●	Saudi Arabia	577	328	-249	-43%
●	Bangladesh	238	315	77	32%
●	<b>Grand Total</b>	<b>40,418</b>	<b>45,071</b>	<b>4,653</b>	<b>12%</b>

# Overall YTD tracker

Cumulative total



- Takeaways:
- Full-year 2015 finished above previous years with TSVs up 13% (10,407) on 2014.
  - The average monthly increase in 2015 on 2014 was approximately 15%.



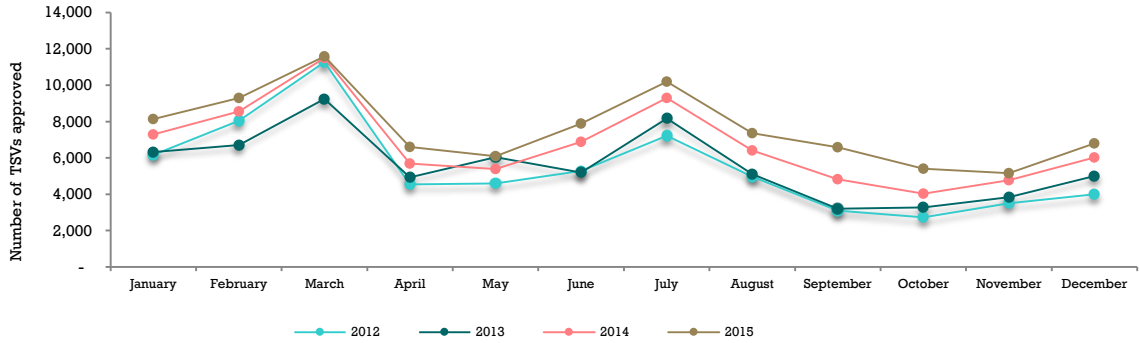
# Overall:

December RSV	December FSV	December TSV
↑ 385 22%	↑ 385 9%	↑ 770 13%

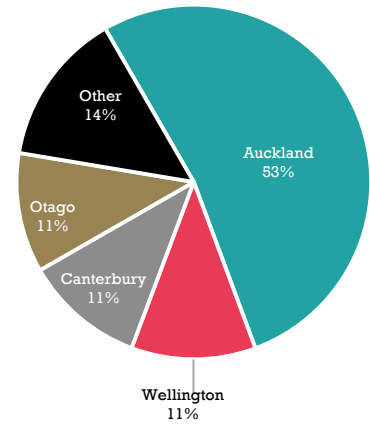
YTD RSV	YTD FSV	YTD TSV
↑ 5,754 14%	↑ 4,653 12%	↑ 10,407 13%

YTD (January - December)

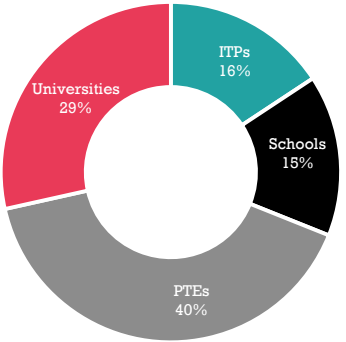
Overall: Total student visas (TSVs) 2012 - 2015



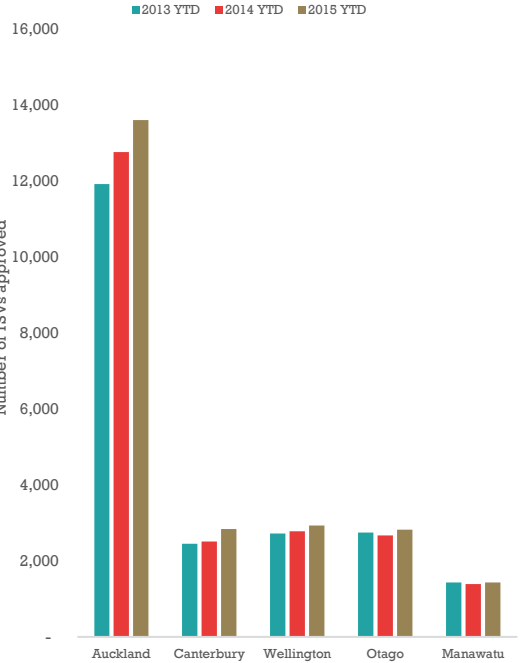
YTD 2015 country breakdown of TSVs



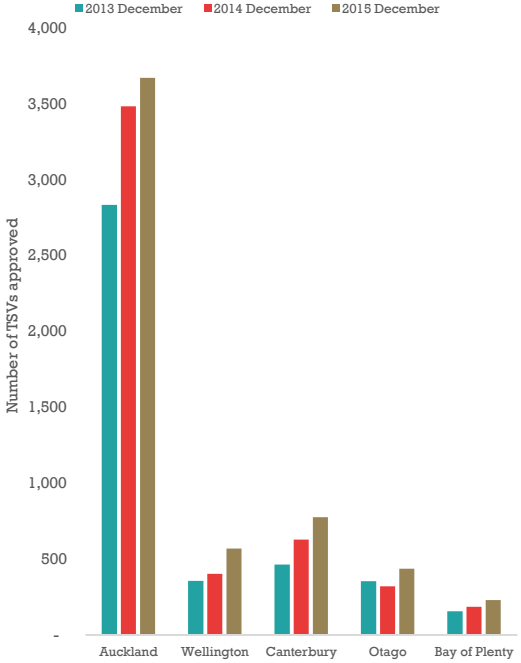
YTD 2015 sector breakdown of TSVs



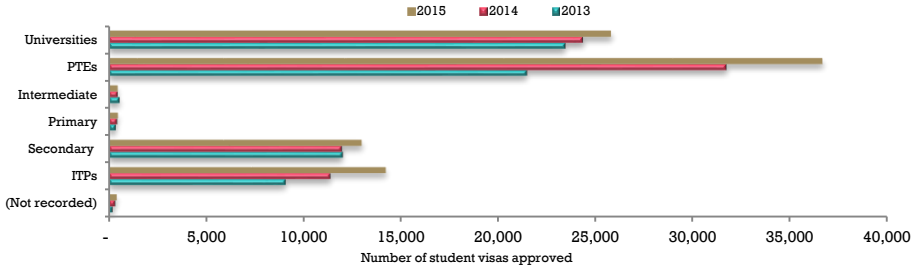
YTD top five regional shifts (TSVs)



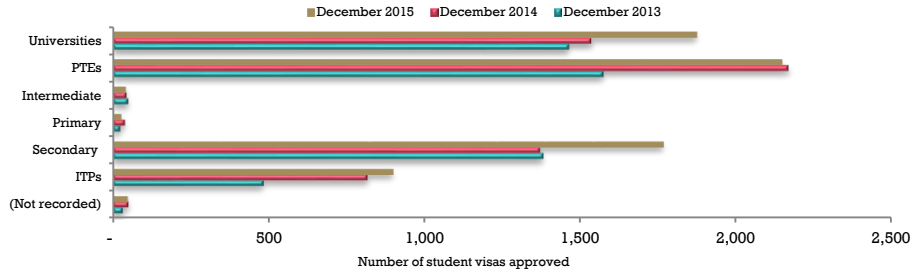
December top five regional shifts (TSVs)



Overall: Total student visas issued by sector, YTD



Overall: Total student visas issued by sector, December



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Wellington	↑ 52%	160
Otago	↑ 49%	115
Canterbury	↑ 22%	105
Waikato	↓ -20%	-68
Taranaki	↓ -33%	-11
Auckland	↓ 0%	-6

TOP FIVE MARKET SHIFTS (FSVs)

YTD		
Country	Change (percentage)	Change (number)
Auckland	↑ 11%	2746
Canterbury	↑ 14%	510
Wellington	↑ 19%	496
Taranaki	↓ -30%	-100
Northland	↓ -6%	-20
Gisborne	↓ -29%	-4

## Takeaways:

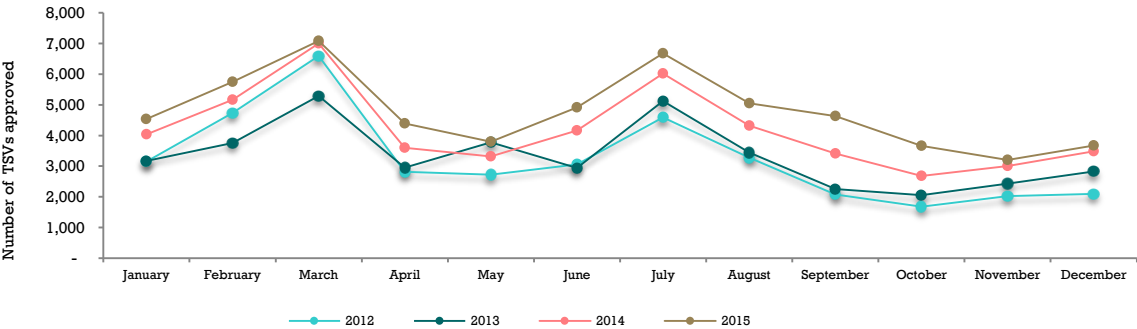
- 2015 TSVs were, up 13% (10,407), FSVs up 12% (4,653) and RSVs increased by 14% (5,754) on 2014.
- December results were positive with FSVs up 9% (385) and RSVs up 22% (385).
- Other regions that experienced strong growth in TSVs in 2015 include: Canterbury up 15% (1,069), Wellington 12% (592) and the Bay of Plenty 20% (361).

# Auckland:

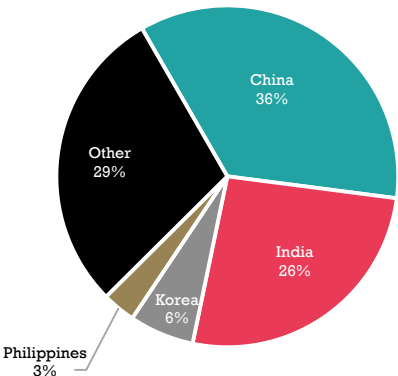


December RSV			December FSV			December TSV			YTD RSV			YTD FSV			YTD TSV		
↑	195	17%	→	-6	0%	↑	189	5%	↑	4,402	17%	↑	2,746	11%	↑	7,148	14%

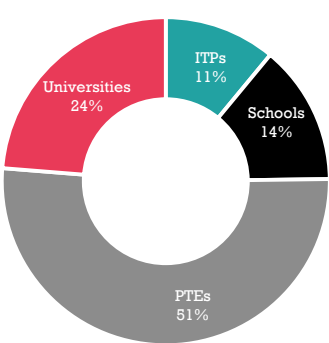
Auckland: Total student visas (TSVs) 2012 - 2015



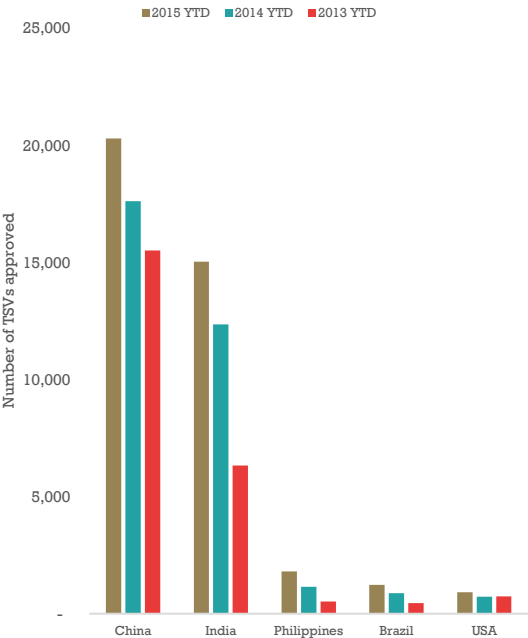
YTD 2015 country breakdown of TSVs



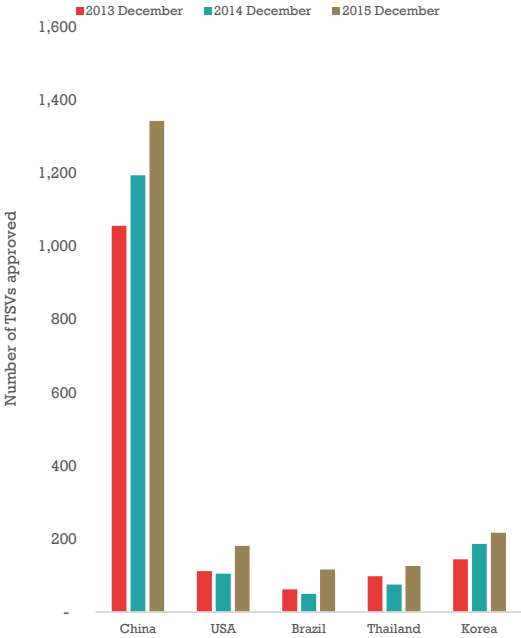
YTD 2015 sector breakdown of TSVs



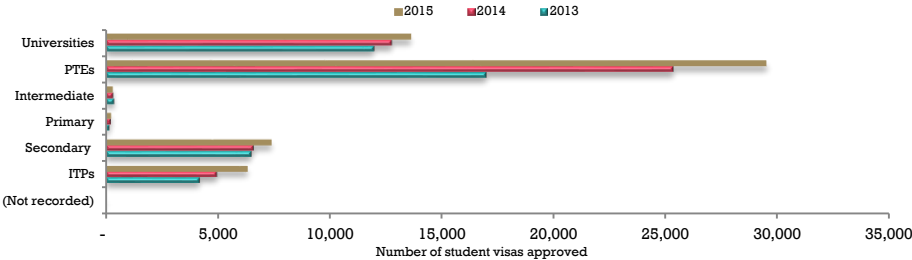
YTD top five market shifts (TSVs)



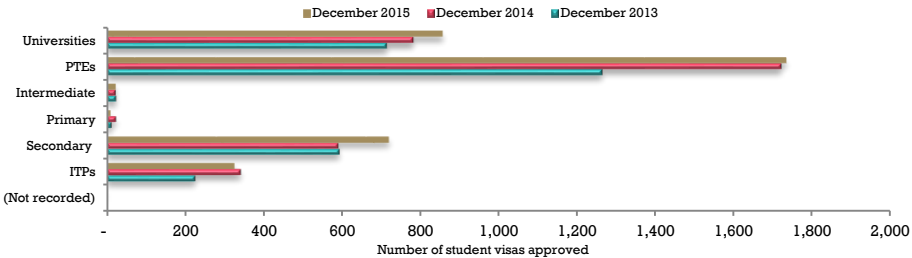
December top five market shifts (TSVs)



Auckland: Total student visas issued by sector, YTD



Auckland: Total student visas issued by sector, December



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
USA	↑ 68%	70
China	↑ 12%	69
Brazil	↑ 151%	62
India	↓ -35%	-265
Philippines	↓ -31%	-20
Malaysia	↓ -51%	-20
YTD		

TOP FIVE MARKET SHIFTS (FSVs)

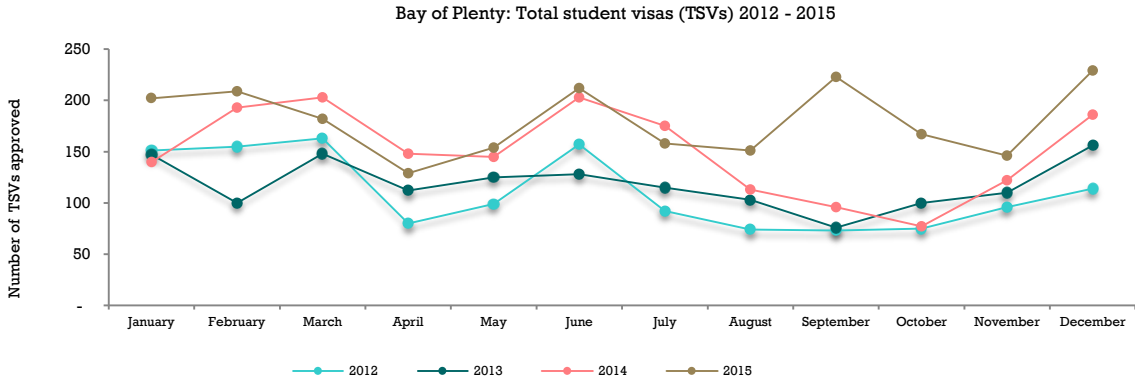
Country	Change (percentage)	Change (number)
China	↑ 17%	886
Philippines	↑ 66%	652
India	↑ 4%	331
Nepal	↓ -53%	-172
Saudi Arabia	↓ -36%	-123
Fiji	↓ -25%	-59

- Takeaways:
- Auckland experienced strong growth in 2015. The growth was driven by returning students up 17% (4,402), while TSVs grew by 14% (7,148), and FSVs by 11% (2,746).
  - China provided the largest growth in TSVs in 2015, up 15% (2,689), India up 22% (2,677) and the Philippines up 58% (665).
  - December results were positive with RSVs up 17% (195) while FSV were flat 0% (-6) on 2014.

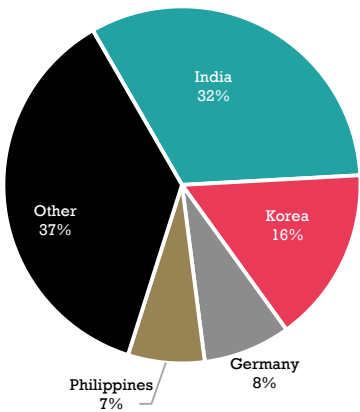
# Bay of Plenty:

December RSV	December FSV	December TSV
↑ 14 27%	↑ 29 22%	↑ 43 23%

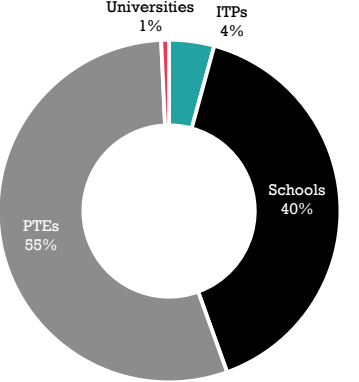
YTD RSV	YTD FSV	YTD TSV
↑ 247 36%	↑ 114 10%	↑ 361 20%



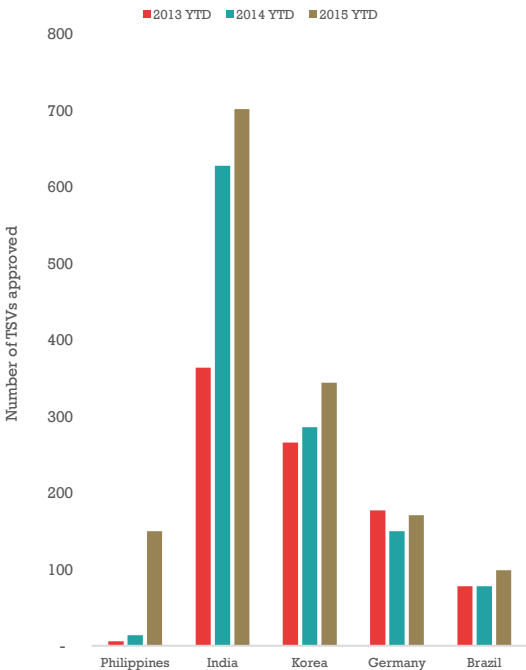
YTD 2015 country breakdown of TSVs



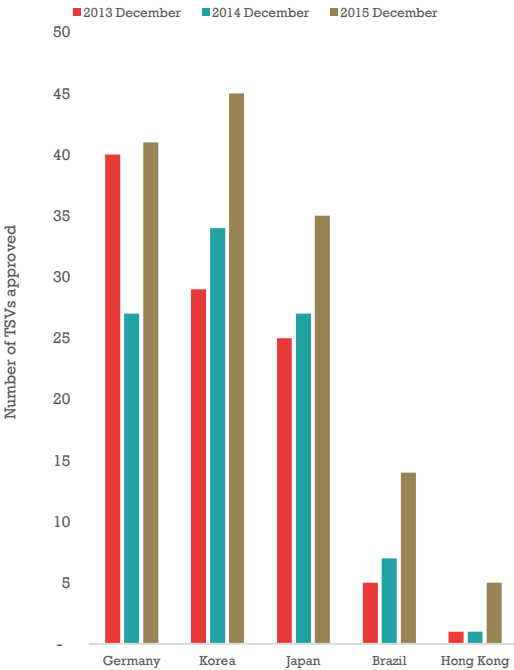
YTD 2015 sector breakdown of TSVs



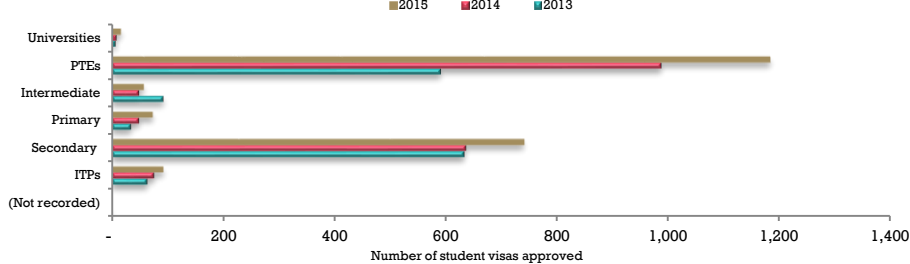
YTD top five market shifts (TSVs)



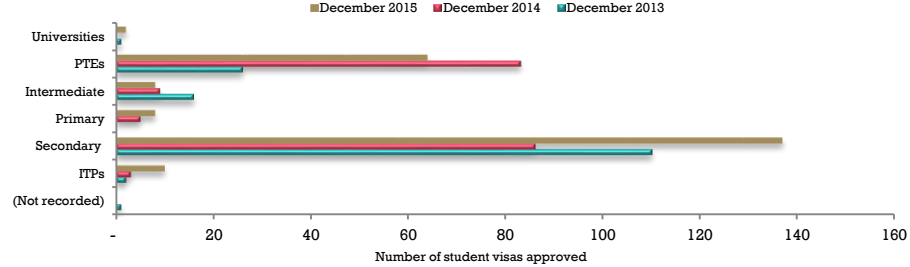
December top five market shifts (TSVs)



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



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

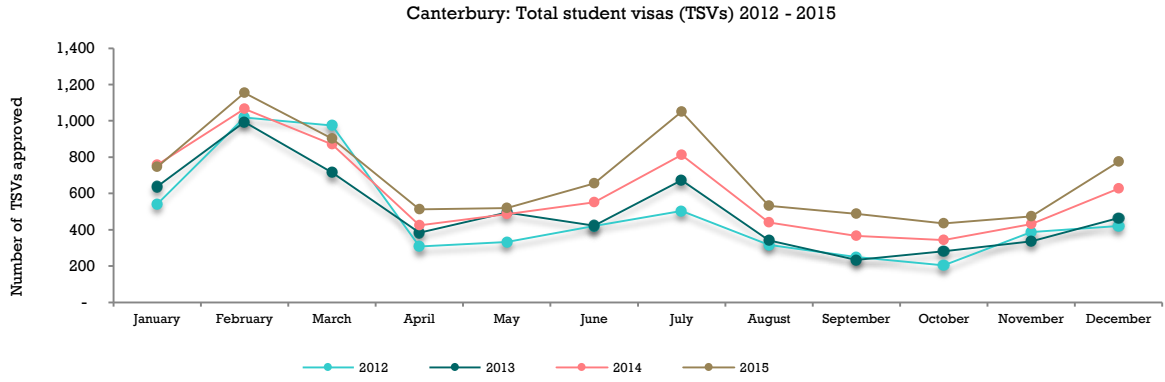


Top and bottom 3 regional shifts (FSVs)

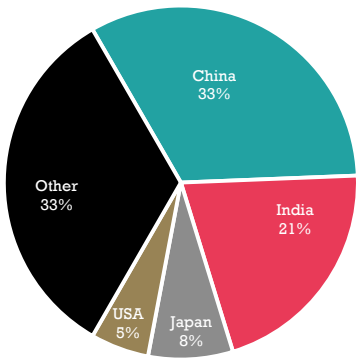
TOP FIVE MARKET SHIFTS (FSVs)	MONTH		
	Country	Change (percentage)	Change (number)
	Japan	↑ 63%	12
	Germany	↑ 42%	11
	Brazil	↑ 100%	7
	India	↓ -46%	-21
	Korea	↓ -5%	-1
	China	↓ -33%	-1
	YTD		
	Country	Change (percentage)	Change (number)
	Philippines	↑ 1360%	136
	Germany	↑ 19%	26
	Chile	↑ 200%	18
	India	↓ -14%	-54
	Nepal	↓ -44%	-32
	Bangladesh	↓ -63%	-26

- Takeaways:
- The Bay of Plenty was one of 2015's fastest growing regions experiencing strong TSV growth in 2015 up 20% (361) and FSVs up 10% (114).
  - December results were strong with FSVs up 22% (29) and TSVs up 23% (43).
  - FSVs from the Philippines, Germany and Chile experienced the biggest growth in 2015.

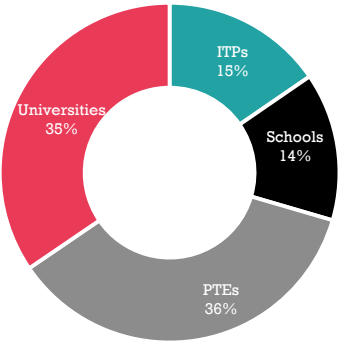
YTD (January - December)					
December RSV		December FSV		December TSV	
↑	44	29%	↑	105	22%
↑	149	24%	↑	559	16%
↑	510	14%	↑	1,069	15%



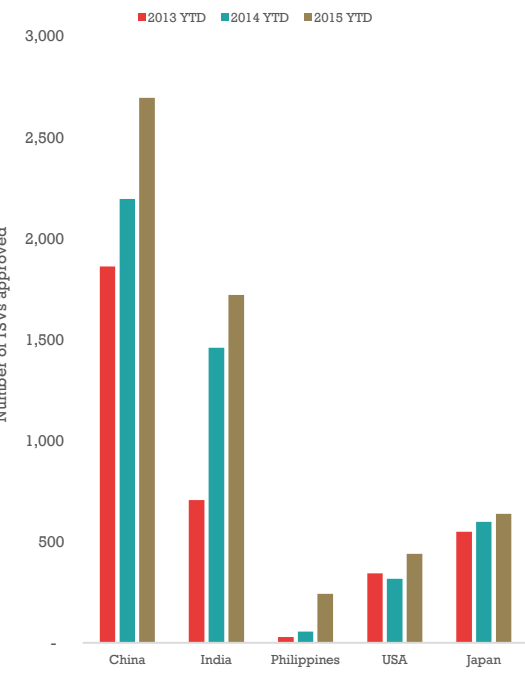
YTD 2015 country breakdown of TSVs



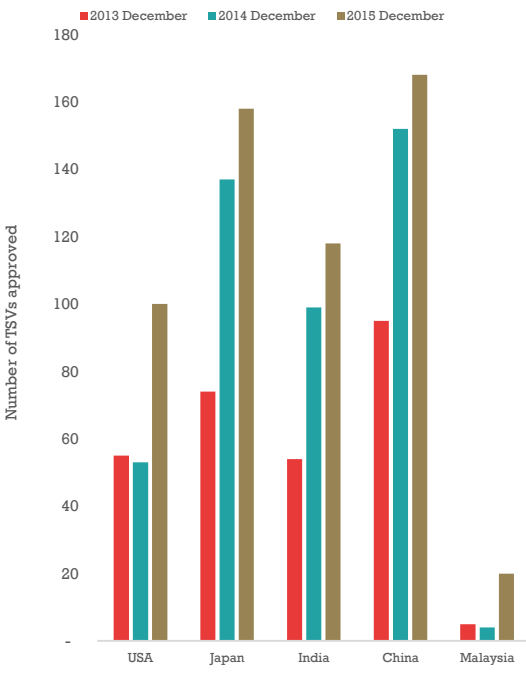
YTD 2015 sector breakdown of TSVs



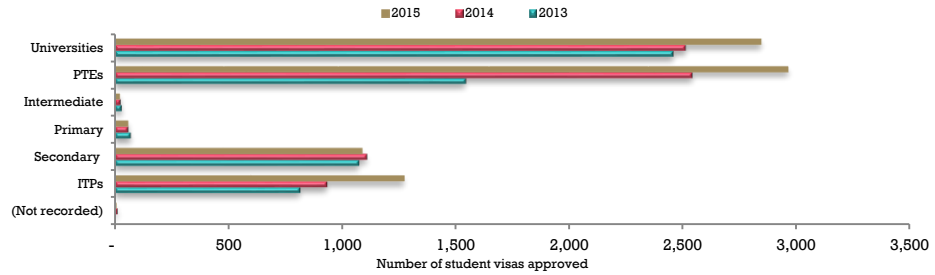
YTD top five market shifts (TSVs)



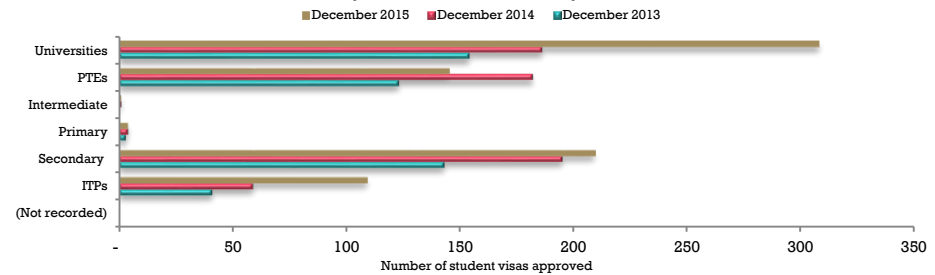
December top five market shifts (TSVs)



Canterbury: Total student visas issued by sector, YTD



Canterbury: Total student visas issued by sector, December



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
USA	↑ 96%	49
Japan	↑ 17%	19
India	↑ 17%	14
China	↓ -15%	-15
Great Britain	↓ -88%	-7
Brazil	↓ -60%	-6
YTD		
Country	Change (percentage)	Change (number)
Philippines	↑ 456%	178
China	↑ 21%	140
USA	↑ 43%	124
Thailand	↓ -27%	-33
Brazil	↓ -25%	-32
Germany	↓ -19%	-30

- Takeaways:
- Canterbury experienced strong growth in TSVs in 2015, up 15% (1,069) and FSV up 14% (510) on 2014.
  - December results were positive with TSVs up 24% (149) and FSVs up 22% (105).
  - The largest growth in FSVs in 2015 were from: the Philippines up 456% (178), China up 21% (140) and the USA up 43% (124).



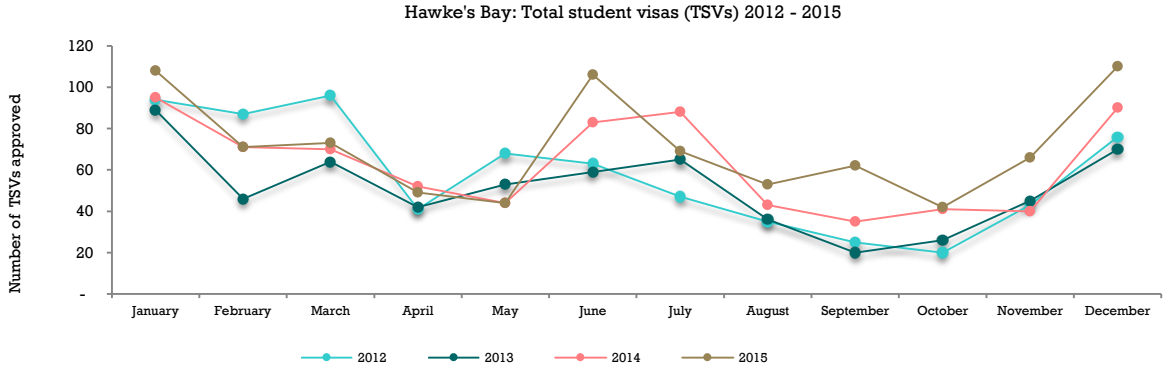
# Hawke's Bay:



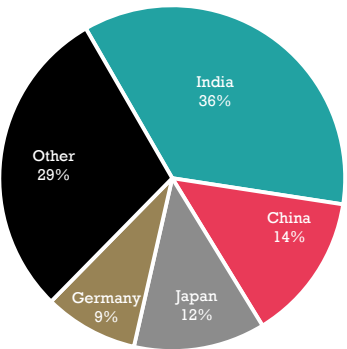
YTD (January - December)

December RSV	December FSV	December TSV
20 95%	0 0%	20 22%

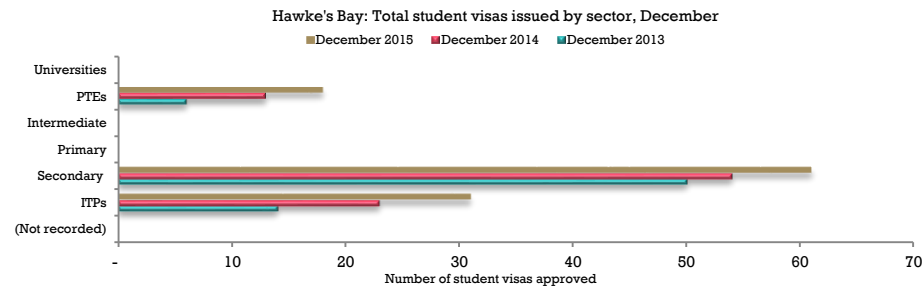
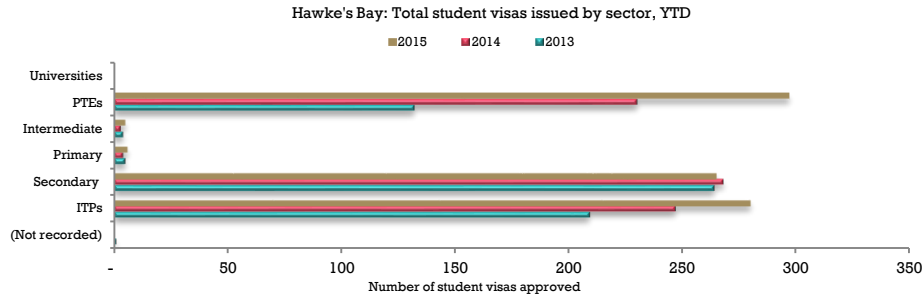
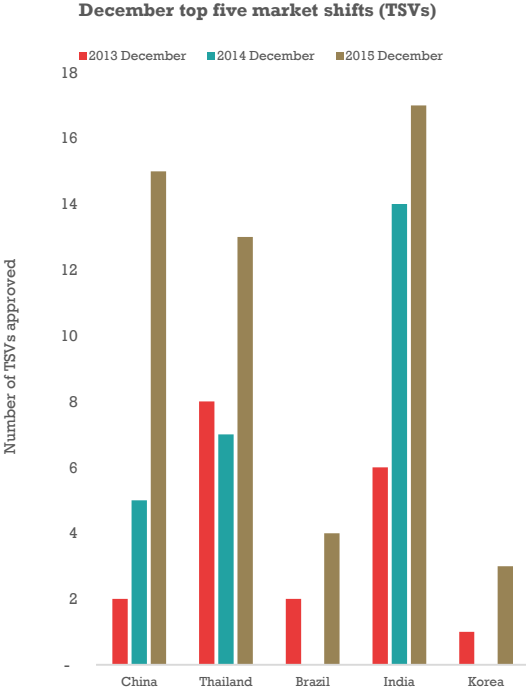
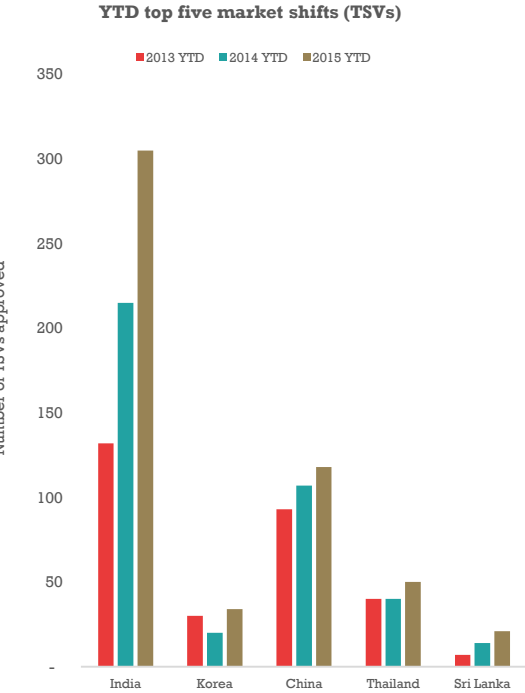
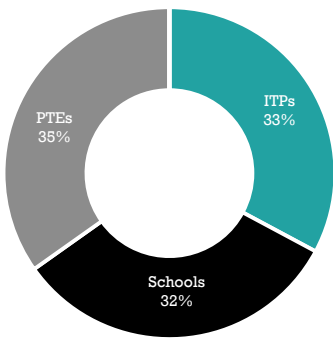
YTD RSV	YTD FSV	YTD TSV
66 22%	35 8%	101 13%



YTD 2015 country breakdown of TSVs



YTD 2015 sector breakdown of TSVs



Top and bottom 3 regional shifts (FSVs)

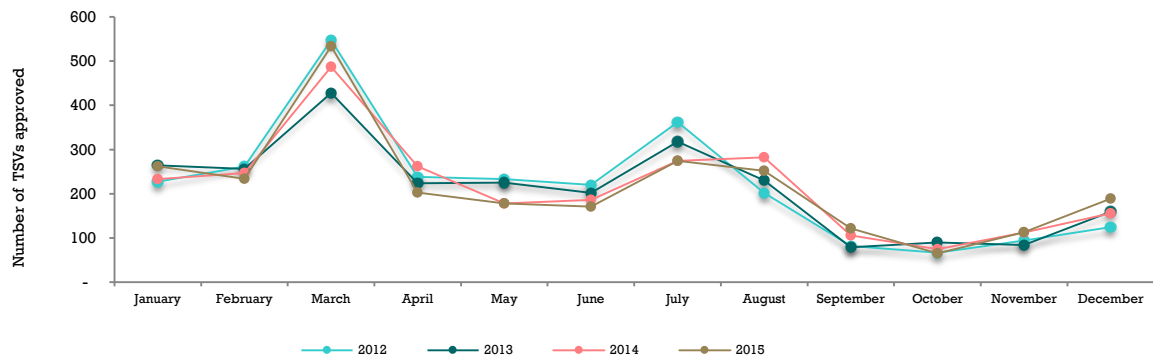
MONTH		
Country	Change (percentage)	Change (number)
Brazil	NA	4
Thailand	NA	3
China	50%	2
Japan	-25%	-8
Germany	-31%	-5
Philippines	-100%	-2

YTD		
Country	Change (percentage)	Change (number)
India	30%	40
Korea	113%	9
Sri Lanka	100%	7
Germany	-22%	-18
Brazil	-41%	-9
France	-56%	-5

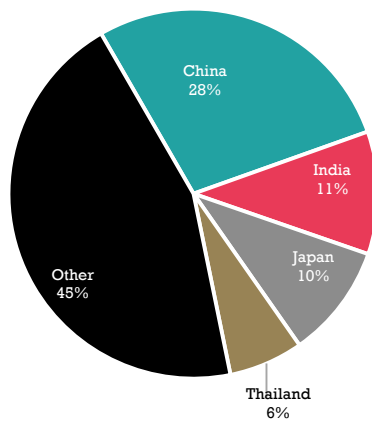
- Takeaways:
- TSVs in 2015 experienced strong growth, up 13% (101) and FSVs up 8% (35).
  - December results were mixed with TSVs up 22% (20) and FSVs flat.
  - Indian students are the largest source of students, contributing to 36% of all students.



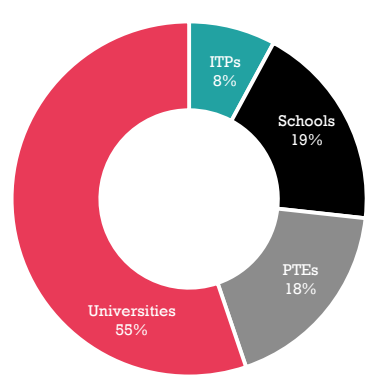
Manawatu: Total student visas (TSVs) 2012 - 2015



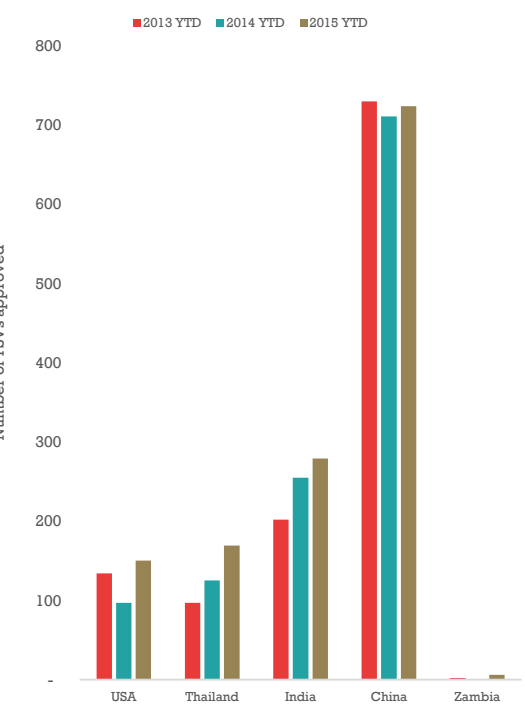
YTD 2015 country breakdown of TSVs



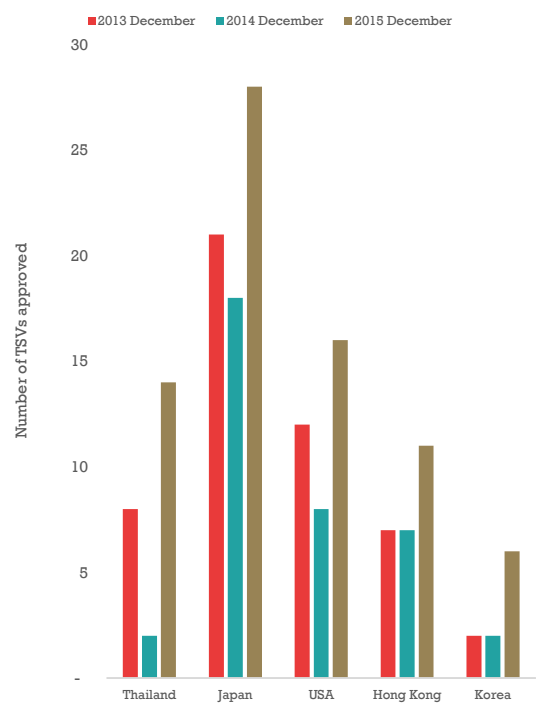
YTD 2015 sector breakdown of TSVs



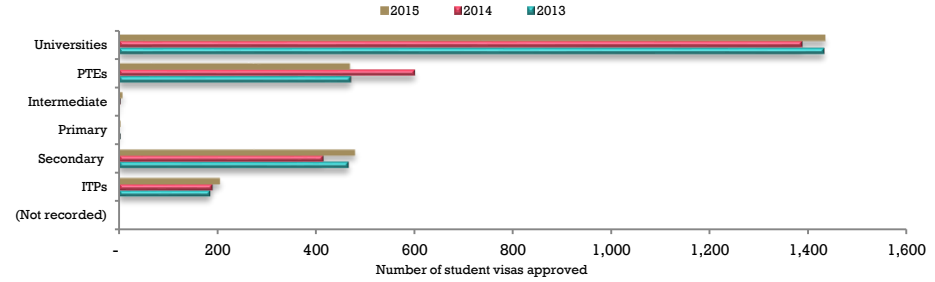
YTD top five market shifts (TSVs)



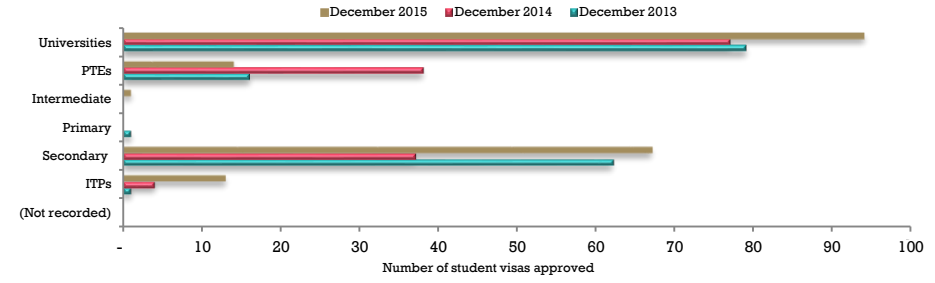
December top five market shifts (TSVs)



Manawatu: Total student visas issued by sector, YTD



Manawatu: Total student visas issued by sector, December



Top and bottom 3 regional shifts (FSVs)

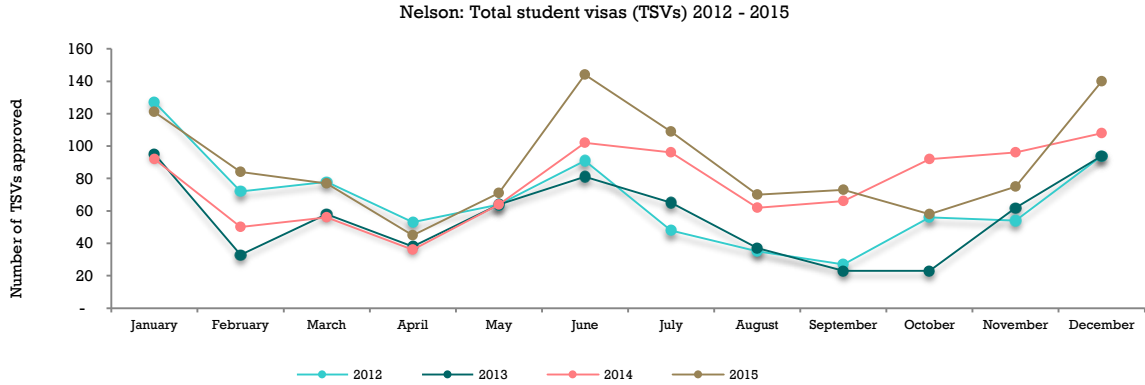
MONTH		
Country	Change (percentage)	Change (number)
USA	↑ 500%	15
Malaysia	NA	4
China	↑ 20%	2
Japan	↓ -60%	-6
Saudi Arabia	↓ -86%	-6
Pakistan	↓ -100%	-4

TOP FIVE MARKET SHIFTS (FSVs)

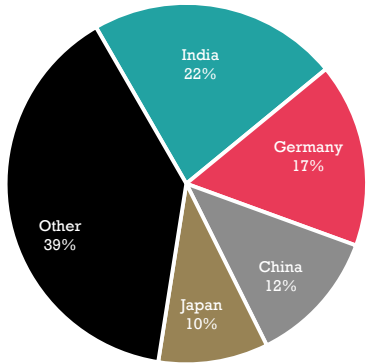
YTD		
Country	Change (percentage)	Change (number)
USA	↑ 94%	58
Thailand	↑ 37%	22
India	↑ 11%	18
Indonesia	↓ -63%	-25
Japan	↓ -15%	-20
Saudi Arabia	↓ -69%	-18

- Takeaways:
- The Manawatu region experienced a flat year 2015.
  - December was a strong month with TSVs up 21% (33) and FSVs up 13% (15).
  - Declines in FSV for 2015 were driven by Indonesia, Japan and Saudi Arabia

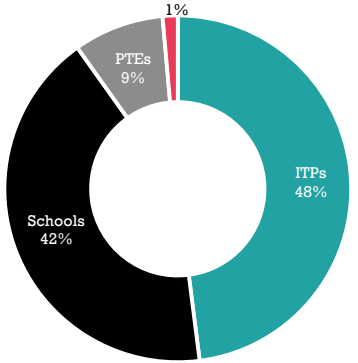
December RSV			December FSV			December TSV			YTD RSV			YTD FSV			YTD TSV		
↑	20	83%	↑	12	14%	↑	32	30%	↑	98	42%	↑	49	7%	↑	147	16%



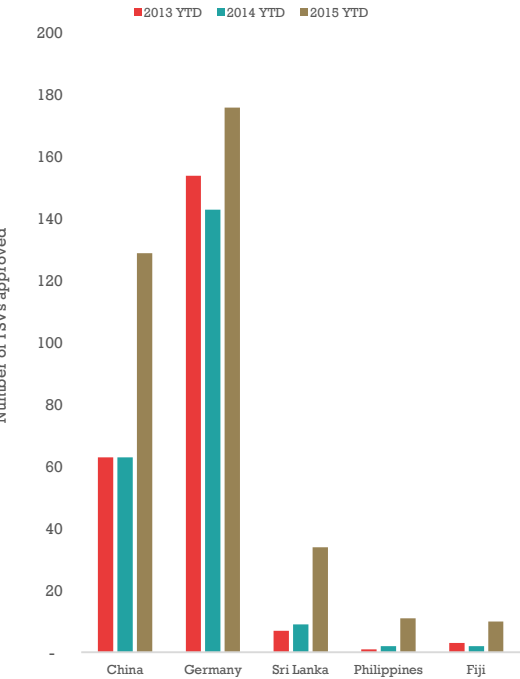
YTD 2015 country breakdown of TSVs



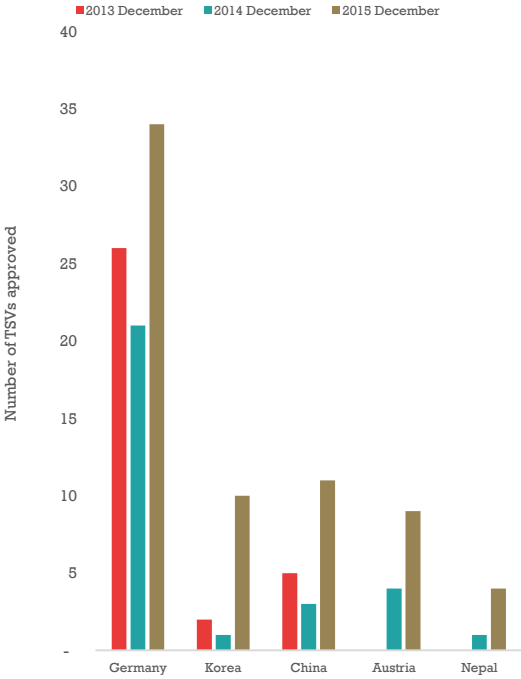
YTD 2015 sector breakdown of TSVs



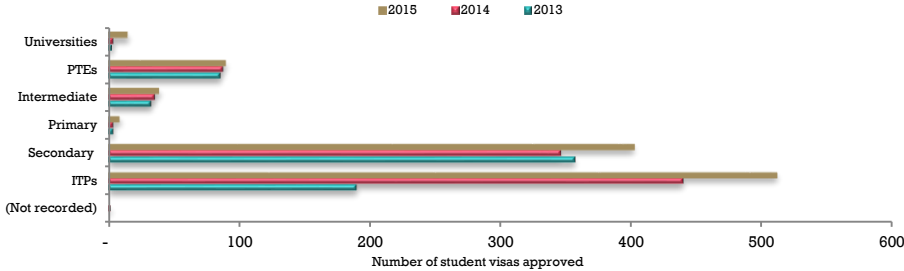
YTD top five market shifts (TSVs)



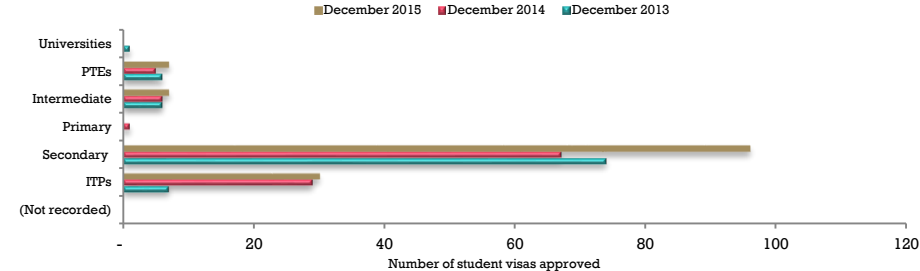
December top five market shifts (TSVs)



Nelson: Total student visas issued by sector, YTD



Nelson: Total student visas issued by sector, December



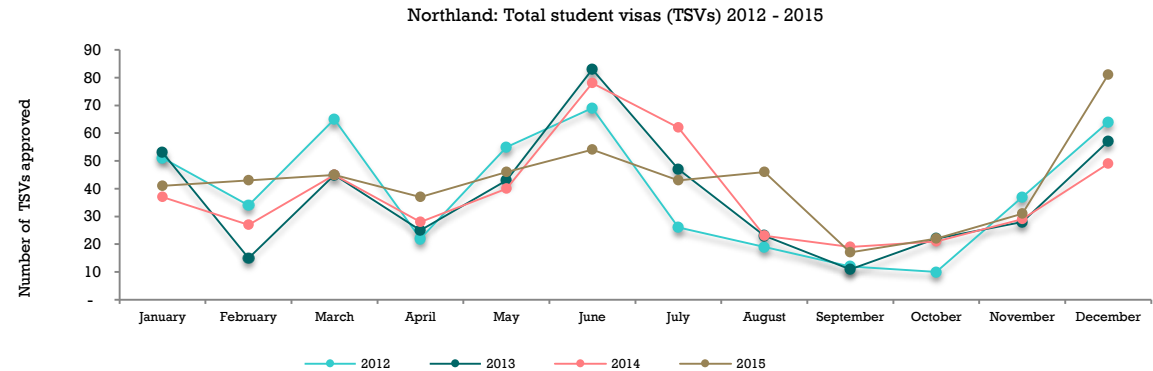
Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Germany	↑ 60%	12
Korea	NA	7
Austria	↑ 100%	4
India	↓ -73%	-16
Japan	↓ -14%	-4
Hong Kong	↓ -100%	-1
YTD		
Country	Change (percentage)	Change (number)
China	↑ 109%	37
Germany	↑ 28%	35
Sri Lanka	↑ 675%	27
India	↓ -23%	-55
Saudi Arabia	↓ -93%	-14
Japan	↓ -16%	-11

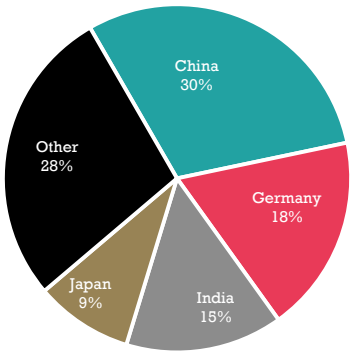
Takeaways:

- Nelson saw strong growth in 2015. TSVs grew by 16% (147), driven by RSVs up 42% (98).
- December grew by 30% (32) in TSVs and 14% (12) in FSVs.
- 2015 TSV growth was from China up 105% (66) and Germany 23% (33). FSV declines in 2015 were driven by: India, Saudi Arabia and Japan.

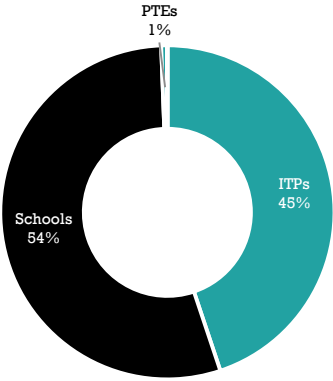
December RSV			December FSV			December TSV			YTD RSV			YTD FSV			YTD TSV		
↑	1	20%	↑	31	70%	↑	32	65%	↑	68	66%	↓	-20	-6%	↑	48	10%



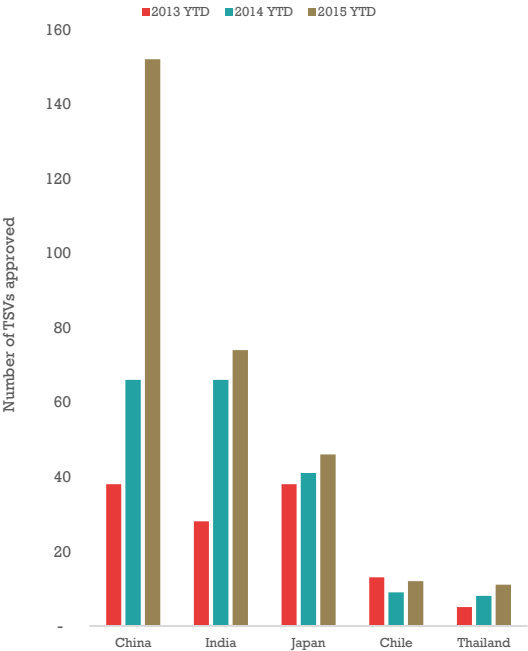
YTD 2015 country breakdown of TSVs



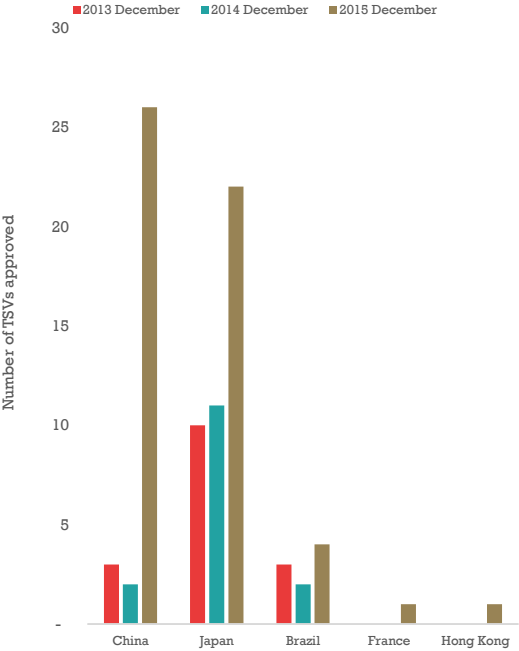
YTD 2015 sector breakdown of TSVs



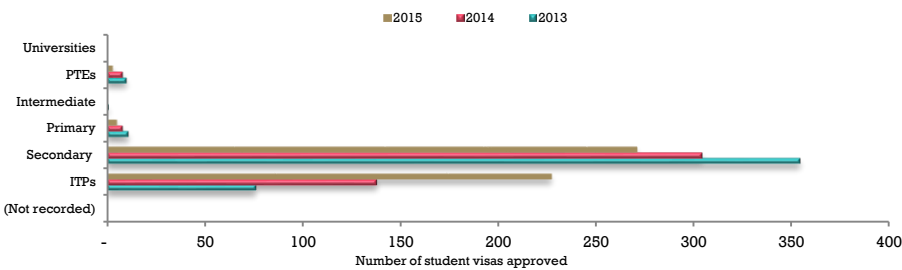
YTD top five market shifts (TSVs)



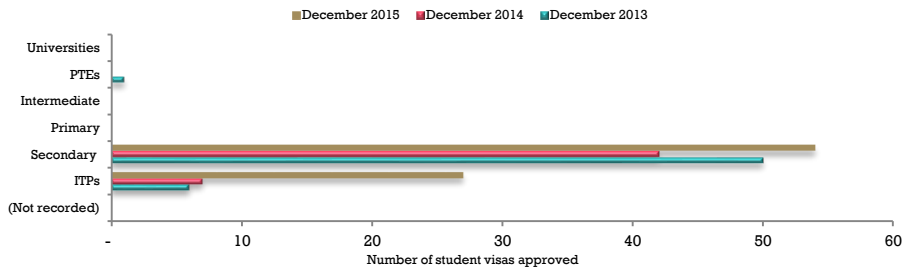
December top five market shifts (TSVs)



Northland: Total student visas issued by sector, YTD



Northland: Total student visas issued by sector, December



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
China	↑ 2200%	22
Japan	↑ 110%	11
Brazil	↑ 100%	2
India	↓ -60%	-3
Germany	↓ -6%	-1
Belgium	↓ -50%	-1
YTD		

TOP FIVE MARKET SHIFTS (FSVs)

Country	Change (percentage)	Change (number)
China	↑ 77%	33
Korea	↑ 71%	5
Japan	↑ 14%	4
Brazil	↓ -51%	-18
Germany	↓ -17%	-17
India	↓ -30%	-17

- Takeaways:
- Northland results for 2015 were mixed with TSVs up 10% (48) due to strong growth in RSVs up 66% (68), however FSVs declined by 6% (-20).
  - December was a strong month with TSVs up 65% (32) and FSVs up 70% (31).
  - 2015 TSV growth was driven by China up 130% (86). Major declines in FSVs in 2015 were from India, Germany and Brazil.

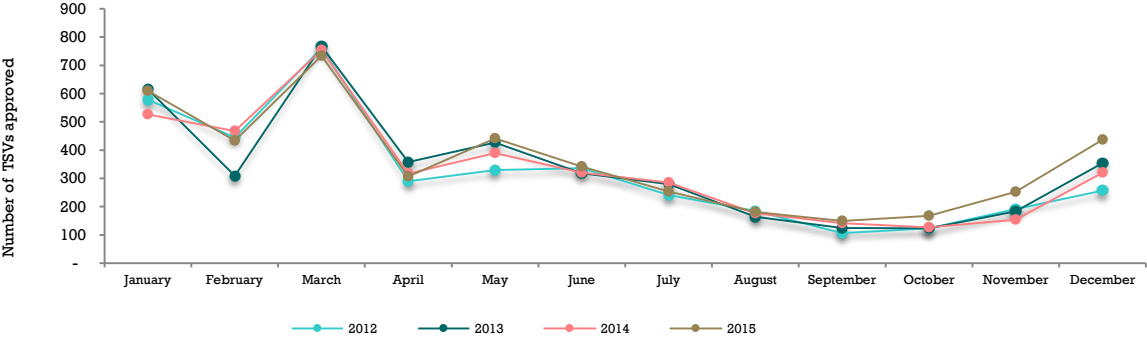


December RSV			December FSV			December TSV		
➡	2	2%	⬆	115	49%	⬆	117	37%

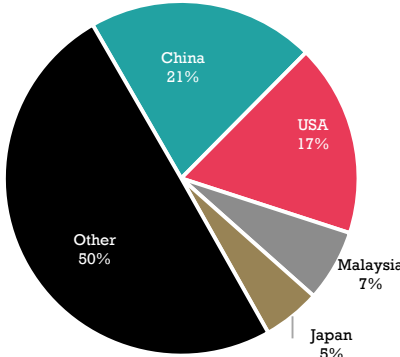
YTD RSV			YTD FSV			YTD TSV		
➡	-29	-1%	⬆	361	19%	⬆	332	8%

YTD (January - December)

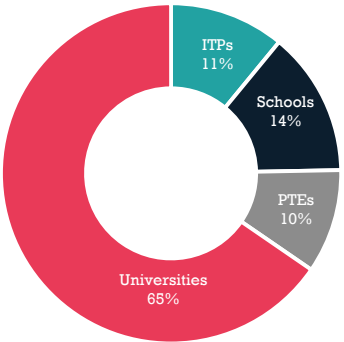
Otago: Total student visas (TSVs) 2012 - 2015



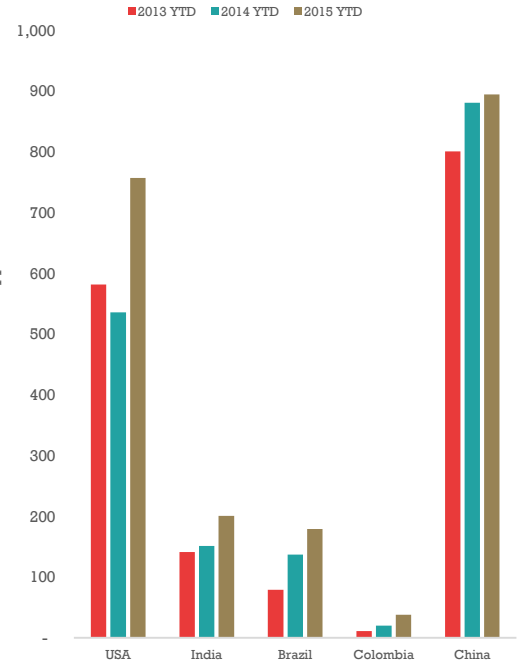
YTD 2015 country breakdown of TSVs



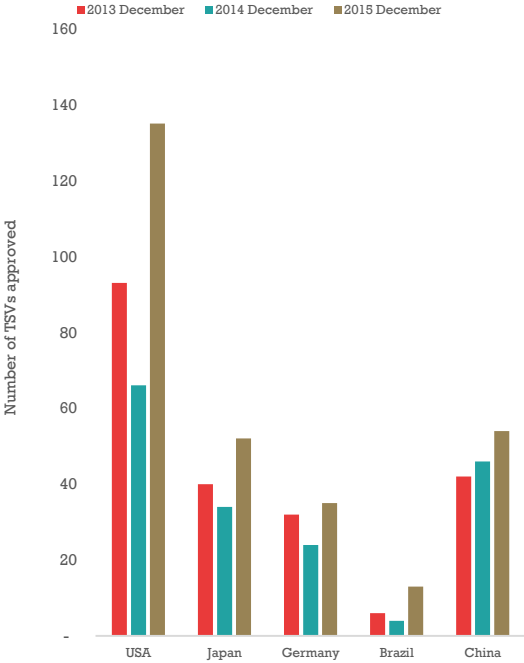
YTD 2015 sector breakdown of TSVs



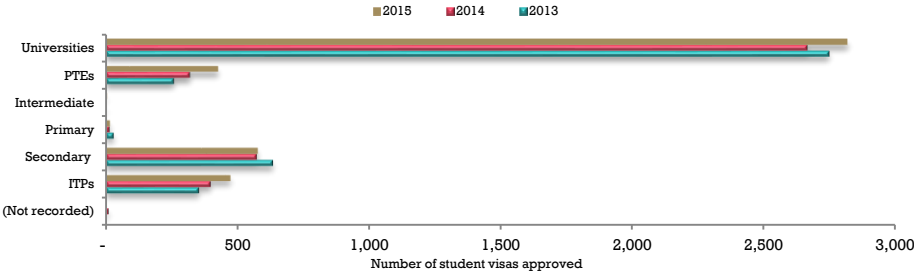
YTD top five market shifts (TSVs)



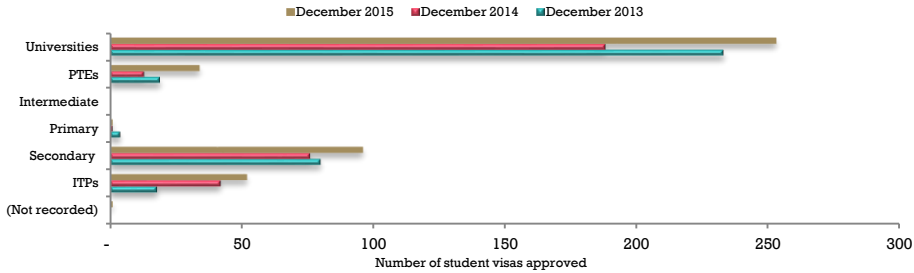
December top five market shifts (TSVs)



Otago: Total student visas issued by sector, YTD



Otago: Total student visas issued by sector, December



Top and bottom 3 regional shifts (FSVs)

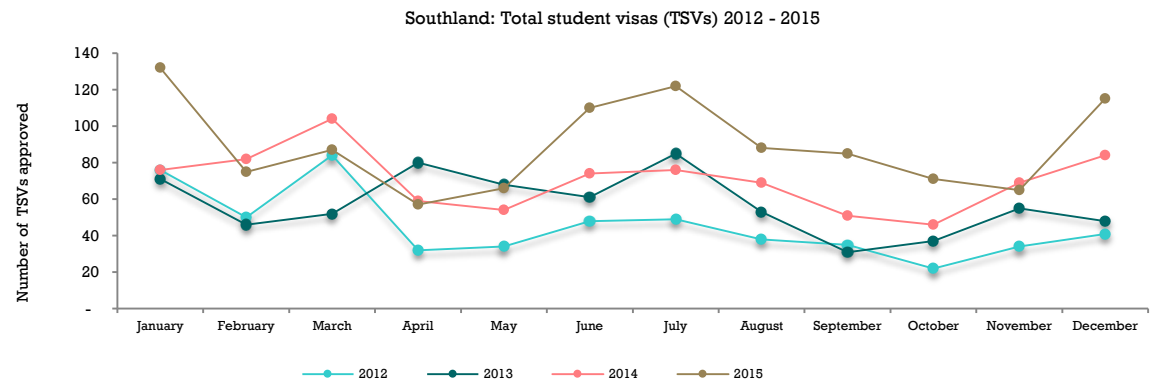
MONTH		
Country	Change (percentage)	Change (number)
USA	⬆ 108%	69
Japan	⬆ 59%	17
Germany	⬆ 45%	10
Canada	⬆ -50%	-5
China	⬆ -12%	-3
Singapore	⬆ -50%	-3
YTD		

TOP FIVE MARKET SHIFTS (FSVs)

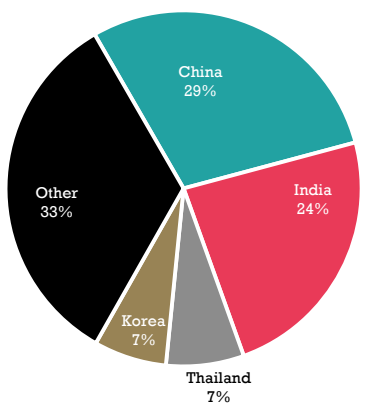
Country	Change (percentage)	Change (number)
USA	⬆ 44%	214
Brazil	⬆ 29%	36
Malaysia	⬆ 63%	36
Thailand	⬆ -31%	-34
Saudi Arabia	⬆ -52%	-17
Germany	⬆ -9%	-15

- Takeaways:
- Otago had strong growth in TSVs in 2015, up 8% (332) and FSVs up 19% (361).
  - December results were positive with TSVs up 37% (117) and FSVs up 49% (115).
  - FSV growth in 2015 was driven by the USA up 44% (214), Brazil 29% (36) and Malaysia 63% (36).

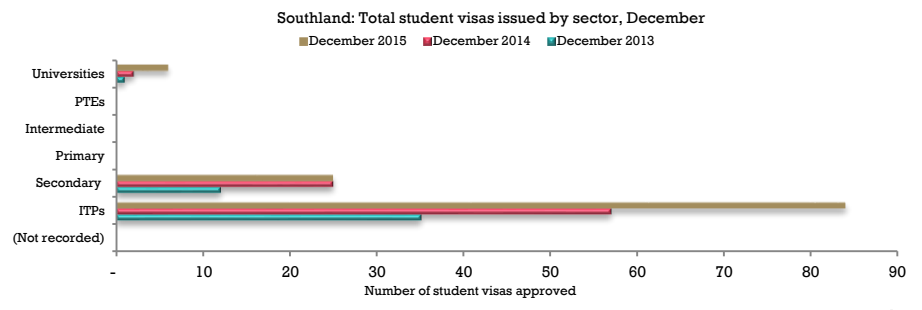
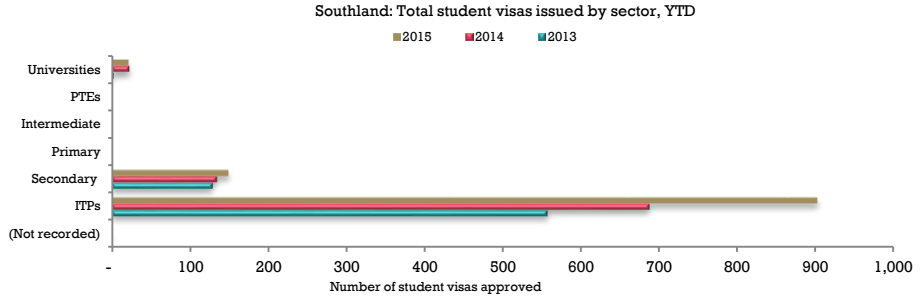
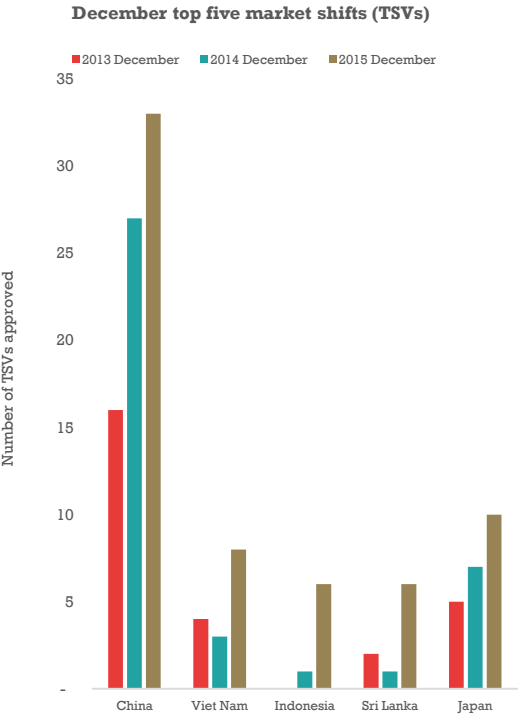
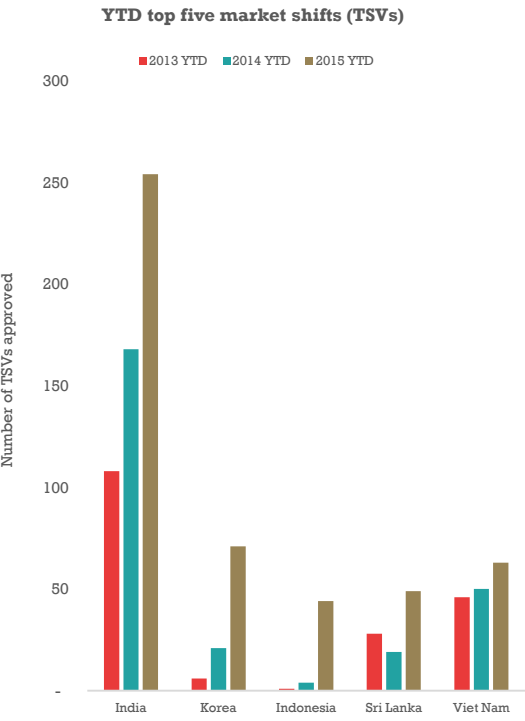
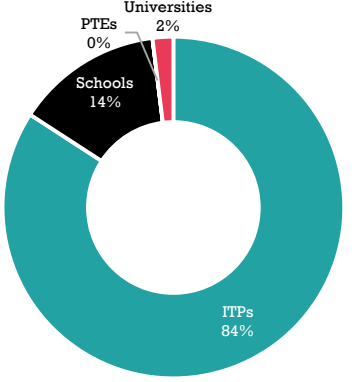
December RSV	December FSV	December TSV	YTD RSV	YTD FSV	YTD TSV
↑ 25 156%	↑ 6 9%	↑ 31 37%	↑ 44 11%	↑ 185 40%	↑ 229 27%



YTD 2015 country breakdown of TSVs



YTD 2015 sector breakdown of TSVs



Top and bottom 3 regional shifts (FSVs)

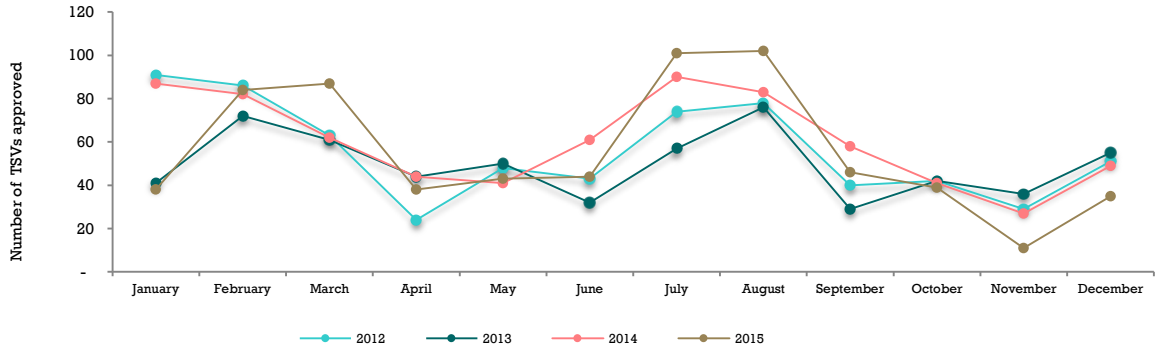
MONTH		
Country	Change (percentage)	Change (number)
Viet Nam	↑ 500%	5
Japan	↑ 43%	3
Indonesia	↑ 300%	3
Thailand	↓ -64%	-9
India	↓ -38%	-6
Bangladesh	↓ -100%	-1
YTD		
Country	Change (percentage)	Change (number)
India	↑ 67%	78
Indonesia	↑ 1200%	36
Korea	↑ 221%	31
China	↓ -15%	-17
Thailand	↓ -31%	-15
Germany	↓ -23%	-9

- Takeaways:
- Southland showed strong growth in TSVs in 2015, up 27% (229), and FSVs up 40% (185).
  - December was a strong month with TSVs up 37% (31) and FSVs 9% (6).
  - Growth in 2015 was driven by: India up 51% (86), Korea up 238% (50) and Indonesia up 1000% (40) in TSVs.

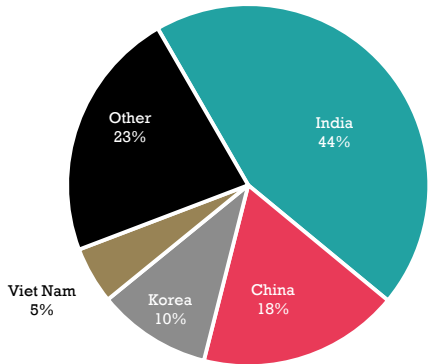
December RSV	December FSV	December TSV
↓ -3 -19%	↓ -11 -33%	↓ -14 -29%

YTD RSV	YTD FSV	YTD TSV
↑ 43 11%	↓ -100 -30%	↓ -57 -8%

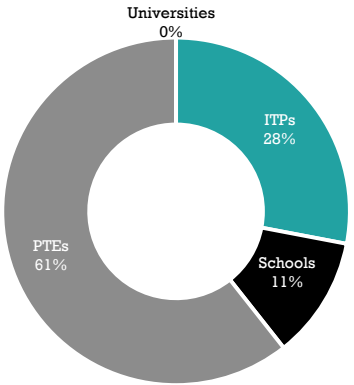
Taranaki: Total student visas (TSVs) 2012 - 2015



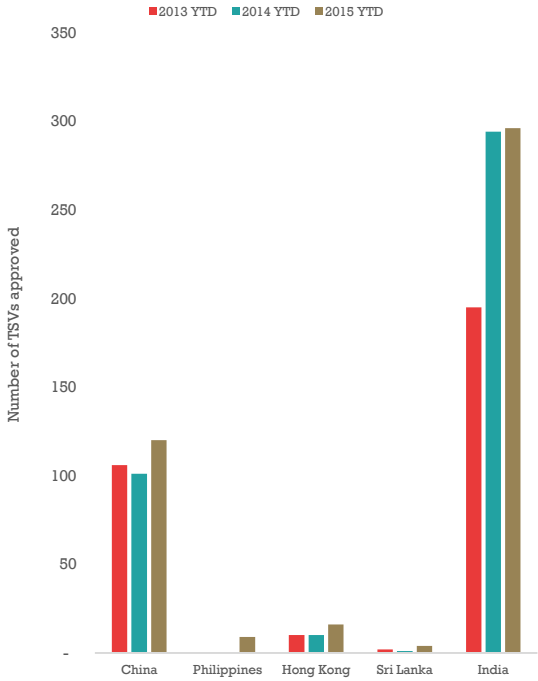
YTD 2015 country breakdown of TSVs



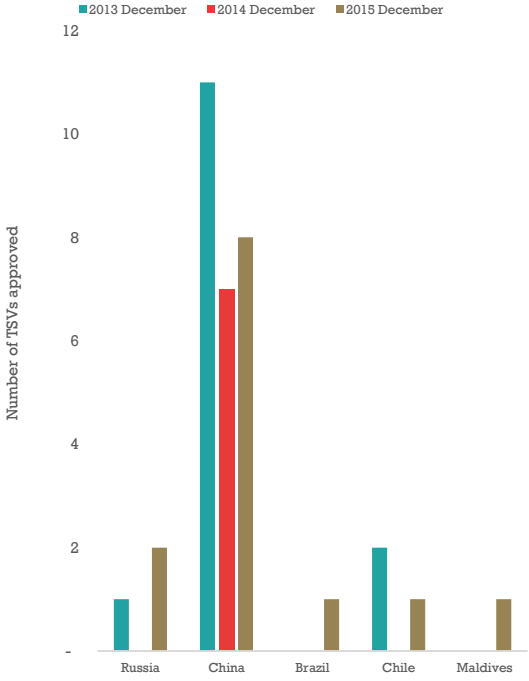
YTD 2015 sector breakdown of TSVs



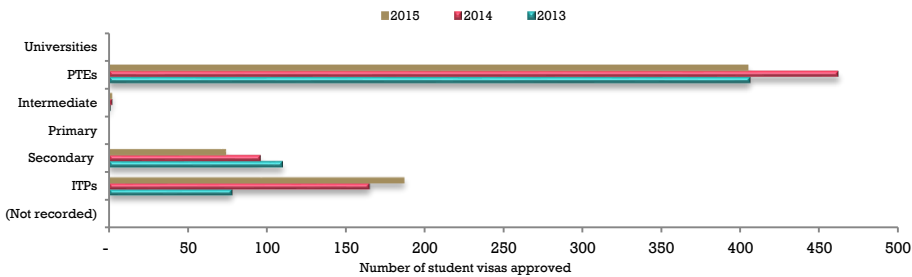
YTD top five market shifts (TSVs)



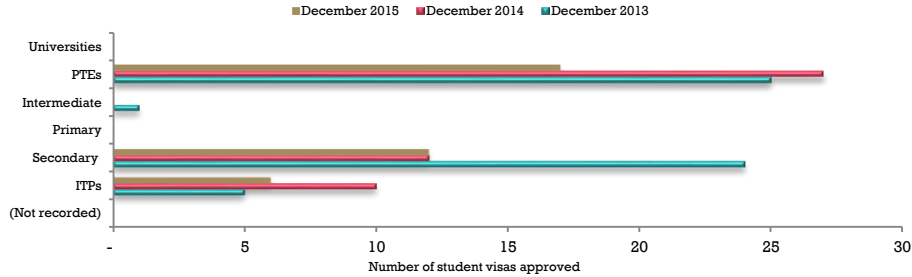
December top five market shifts (TSVs)



Taranaki: Total student visas issued by sector, YTD



Taranaki: Total student visas issued by sector, December



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Russia	NA	2
Brazil	NA	1
Chile	NA	1
India	↓ -50%	-5
Viet Nam	↓ -83%	-5
China	↓ -50%	-3
YTD		

Country	Change (percentage)	Change (number)
Philippines	NA	6
Russia	↑ 38%	3
Hong Kong	NA	3
Korea	↓ -91%	-40
India	↓ -22%	-37
Viet Nam	↓ -80%	-12

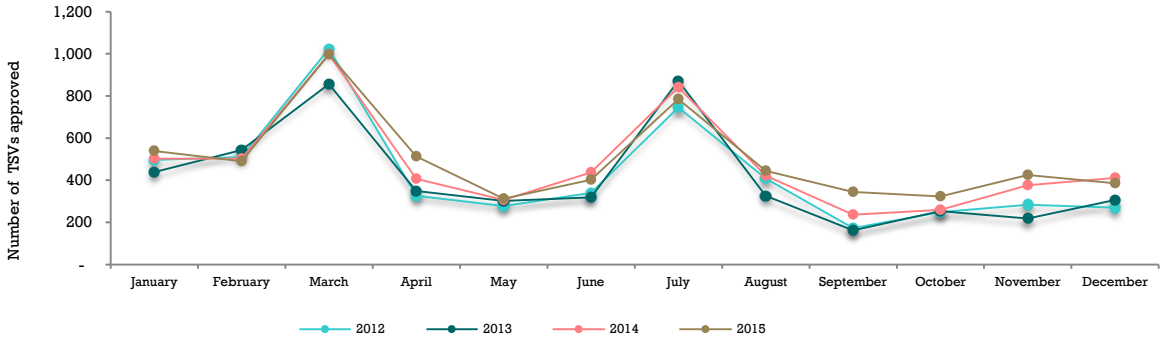
TOP FIVE MARKET SHIFTS (FSVs)

Takeaways:

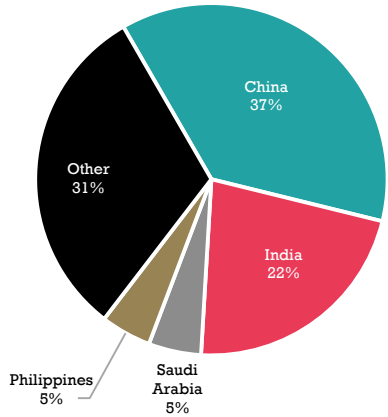
- TSVs in 2015 were down 8% (-57) and FSVs are down 30% (-100).
- December results were negative with TSVs down 29% (-14) and FSVs down 33% (-11).
- Korea, India and Viet Nam experienced a declines in FSVs in 2015.



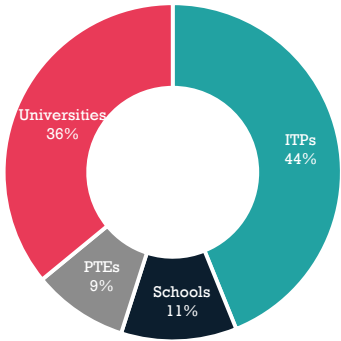
Waikato: Total student visas (TSVs) 2012 - 2015



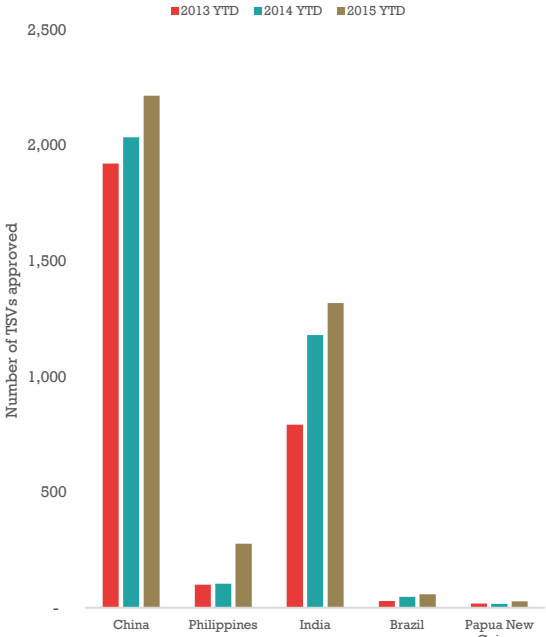
YTD 2015 country breakdown of TSVs



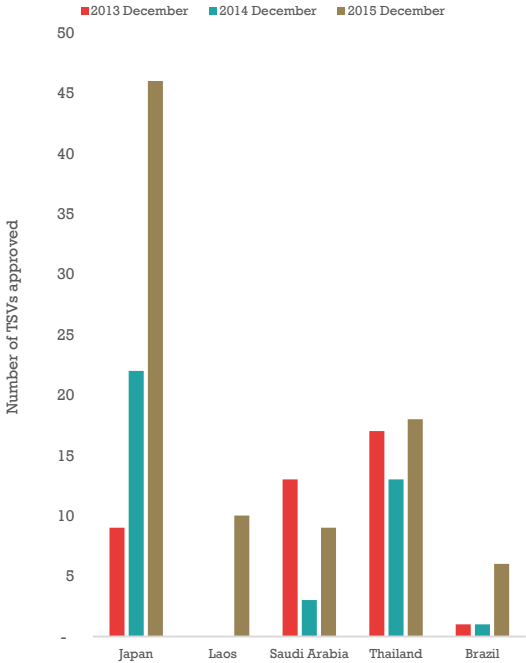
YTD 2015 sector breakdown of TSVs



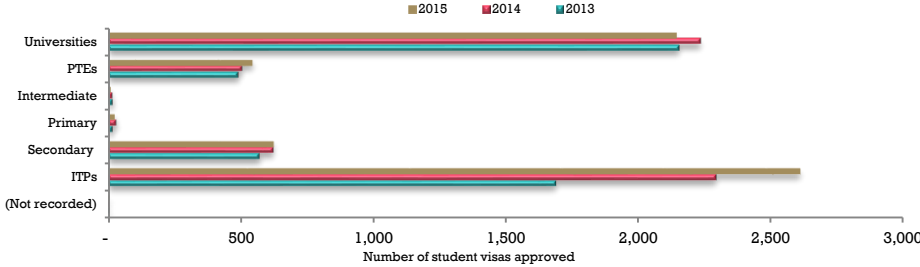
YTD top five market shifts (TSVs)



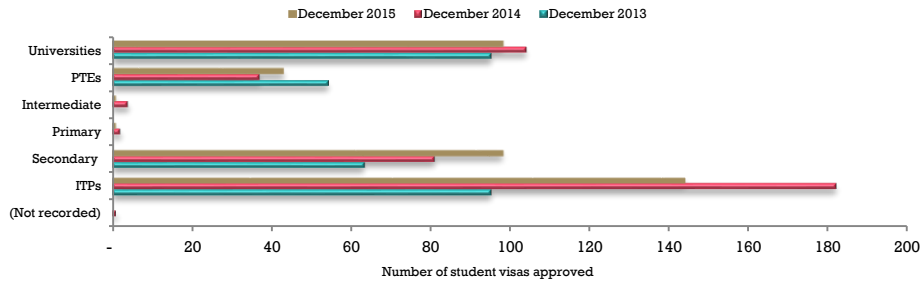
December top five market shifts (TSVs)



Waikato: Total student visas issued by sector, YTD



Waikato: Total student visas issued by sector, December



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Japan	↑ 117%	21
Laos	NA	10
Brazil	NA	5
India	↓ -37%	-39
China	↓ -24%	-16
Germany	↓ -71%	-12
YTD		

TOP FIVE MARKET SHIFTS (FSVs)

Country	Change (percentage)	Change (number)
Philippines	↑ 208%	173
India	↑ 13%	102
China	↑ 12%	75
Saudi Arabia	↓ -60%	-60
Japan	↓ -19%	-35
Nepal	↓ -49%	-32

Takeaways:

- Waikato's TSVs were up 5% (258) and FSVs were up 6% (159) in 2015.
- December results were mixed, TSVs were down 6% (-26) and RSVs were up 54% (42).
- 2015 growth in TSVs was driven by China up 9% (180), the Philippines up 166% (173) and India up 12% (138). Major FSV decreases in 2015 were from: Saudi Arabia, Japan, and Nepal.

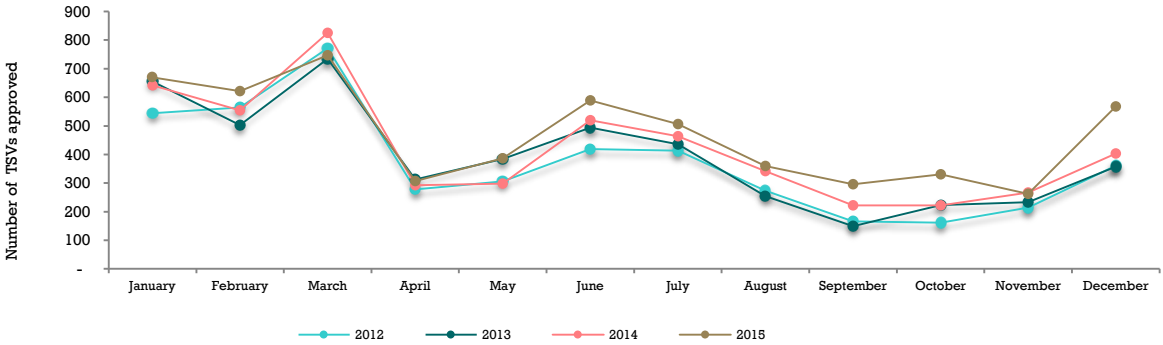


# Wellington:

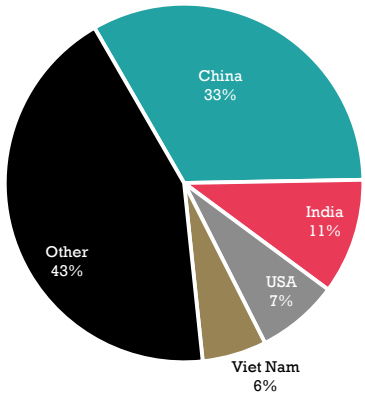
December RSV	December FSV	December TSV
 5    5%	 160    52%	 165    41%

YTD RSV	YTD FSV	YTD TSV
 96    4%	 496    19%	 592    12%

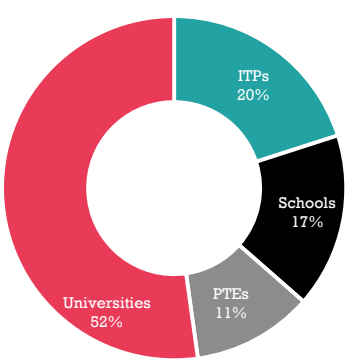
Wellington: Total student visas (TSVs) 2012 - 2015



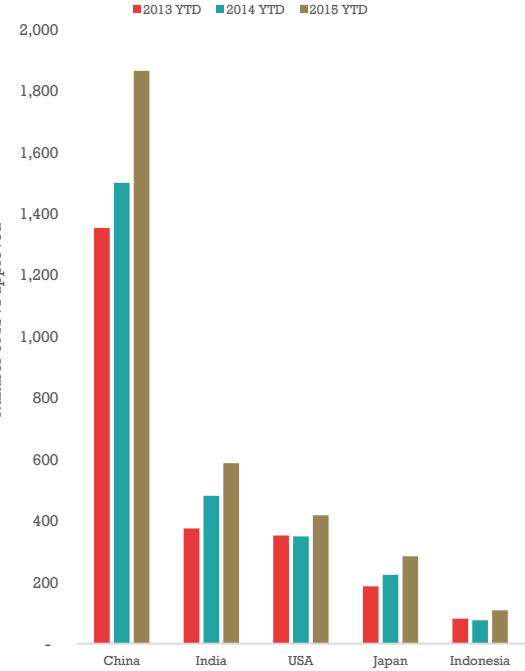
YTD 2015 country breakdown of TSVs



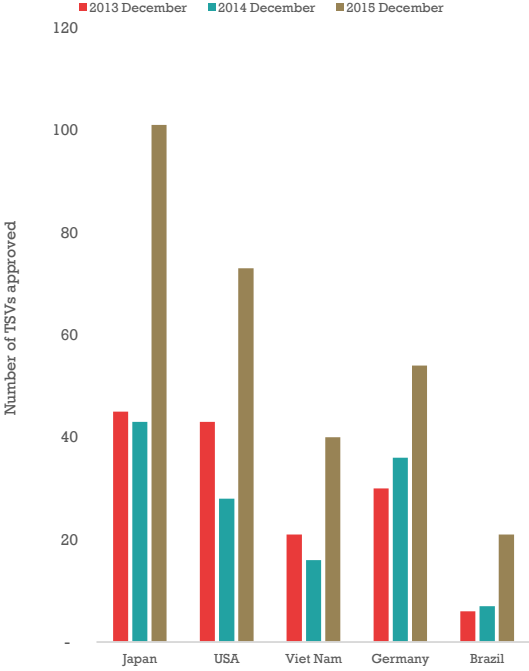
YTD 2015 sector breakdown of TSVs



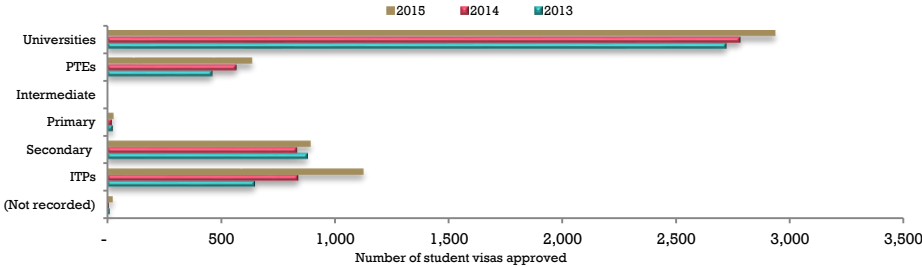
YTD top five market shifts (TSVs)



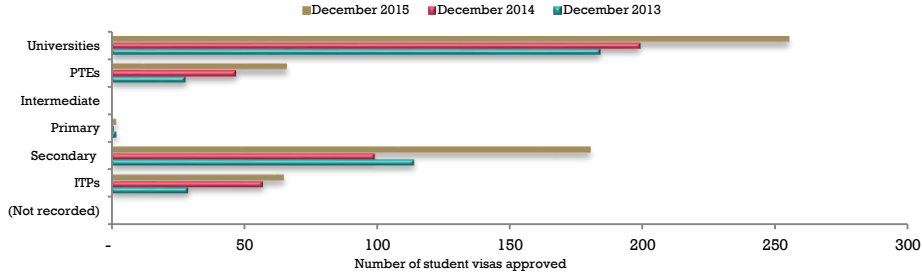
December top five market shifts (TSVs)








Wellington: Total student visas issued by sector, YTD









Wellington: Total student visas issued by sector, December



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Japan	NA	51
USA	 167%	45
Viet Nam	 236%	26
Myanmar	 -94%	-16
Laos	 -92%	-12
Malaysia	 -78%	-7
YTD		

TOP FIVE MARKET SHIFTS (FSVs)

Country	Change (percentage)	Change (number)
China	 26%	128
India	 29%	87
USA	 25%	76
Brazil	 -19%	-27
Germany	 -10%	-17
France	 -31%	-13

Takeaways:

- Wellington has shown steady growth in TSVs in 2015, up 12% (592) and FSVs up 19% (496). December results were positive with FSVs up 52% (160) and TSVs 41% (165).
- 2015 growth in FSVs has been driven by China 26% (128), India, 29% (87) and the USA 25% (76).



# Overall: Sector overview

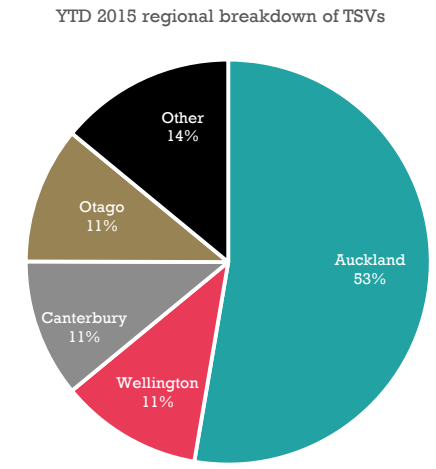
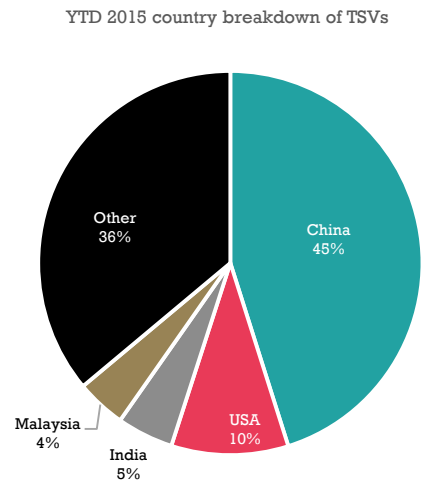
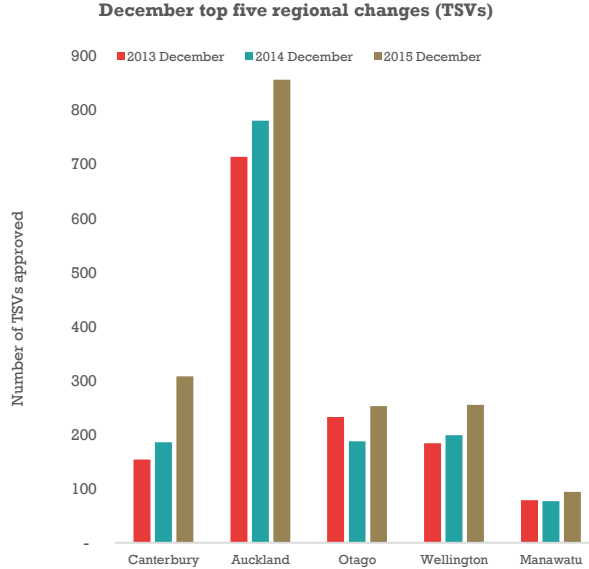
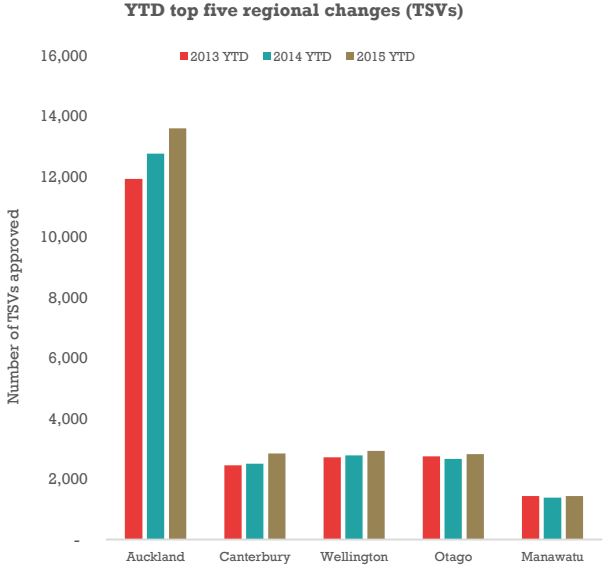
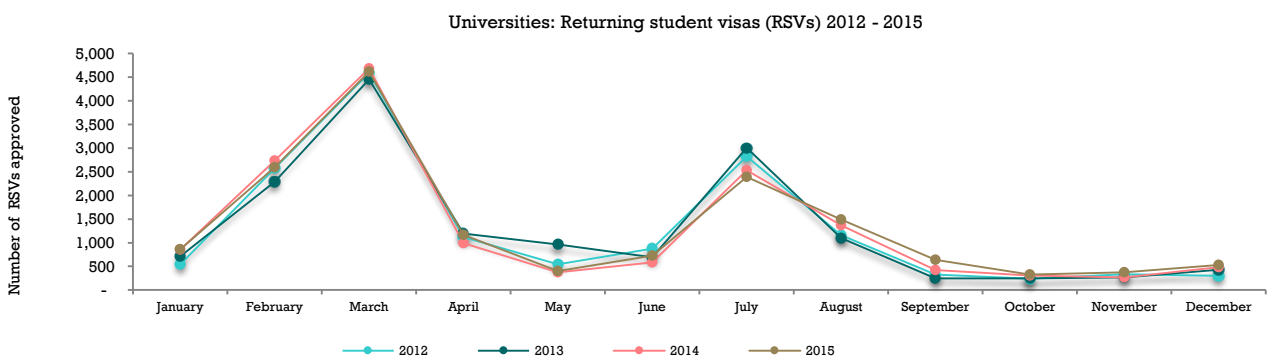
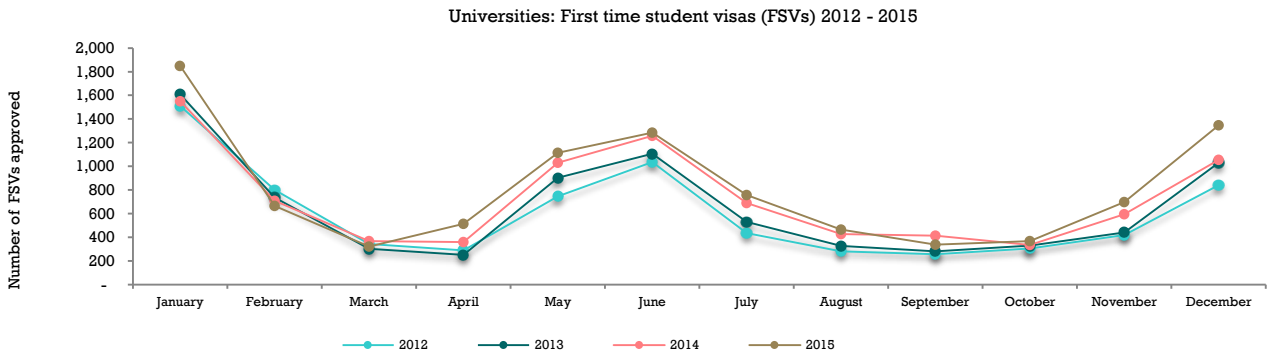
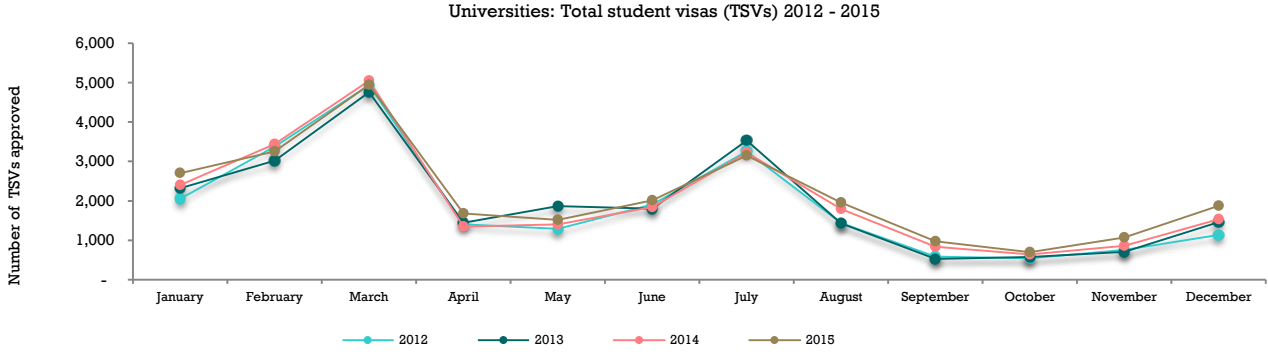




# Universities:

December RSV	December FSV	December TSV
↑ 45 9%	↑ 291 28%	↑ 336 22%

YTD RSV	YTD FSV	YTD TSV
→ 513 3%	↑ 934 11%	↑ 1,447 6%



Takeaways:

- Universities have seen good growth in 2015, with TSVs up 6% (1,447) and FSVs up 11% (934).
- Auckland (up 7%), Canterbury (up 13%) and Wellington (up 6%) experienced strong growth in TSVs in 2015.
- December had strong in FSVs up 28% (291) and TSVs up 22% (336).

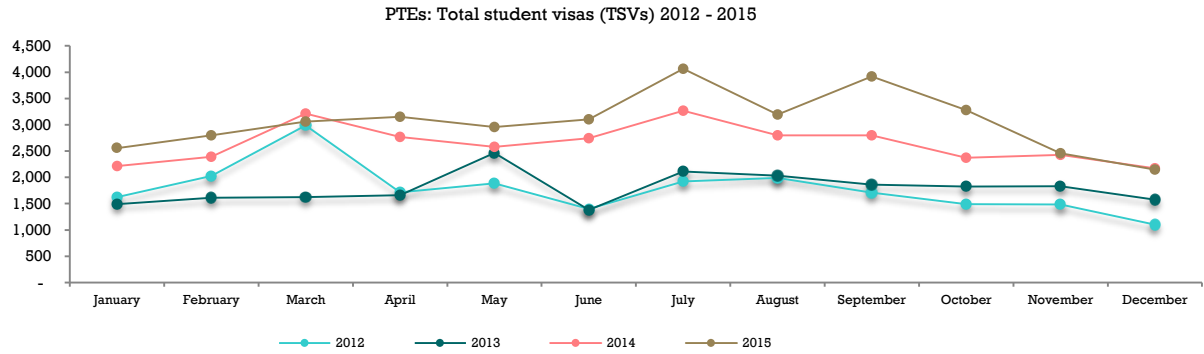
# Private Training Establishments (PTE):



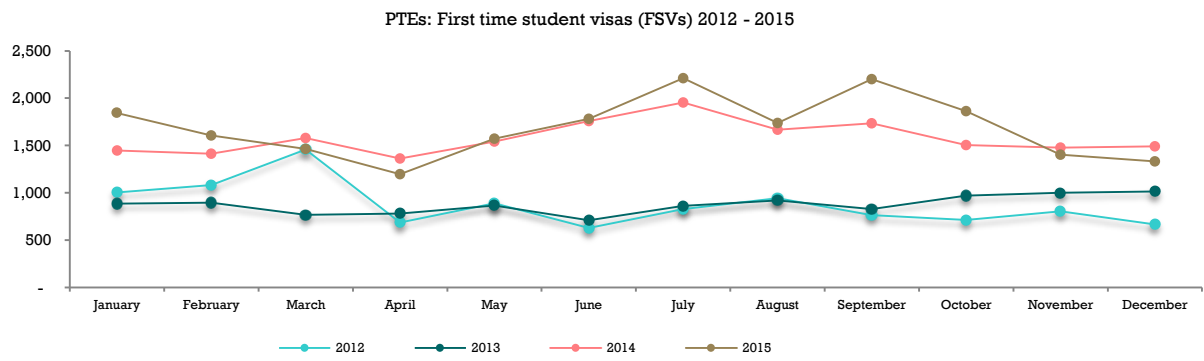
December RSV	December FSV	December TSV
↑ 139 21%	↓ -161 -11%	↓ -22 -1%

YTD RSV	YTD FSV	YTD TSV
↑ 3,659 30%	↑ 1,284 7%	↑ 4,943 16%

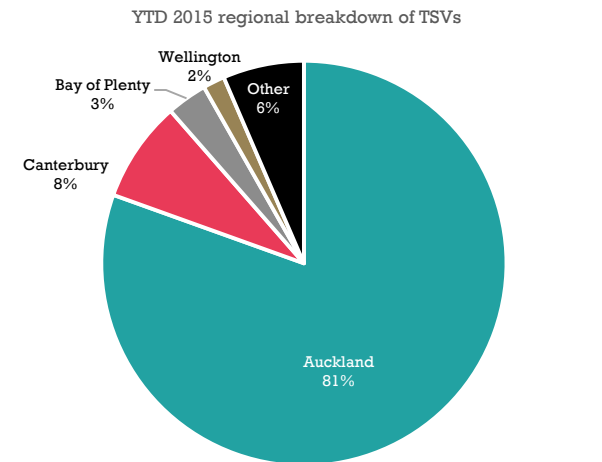
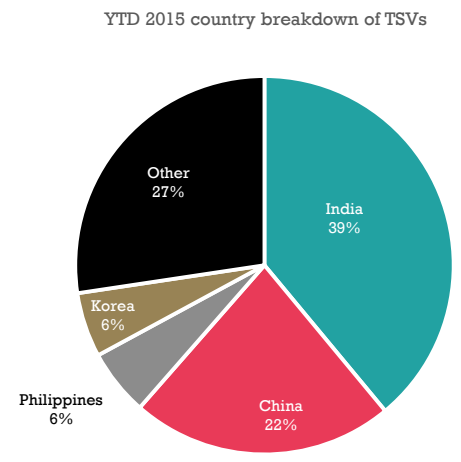
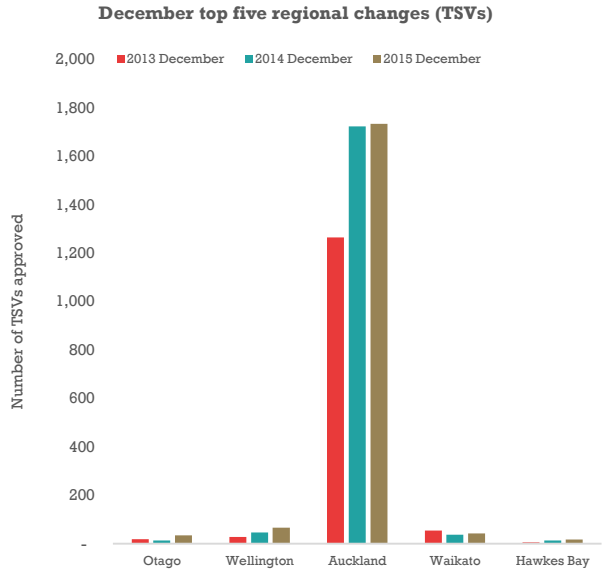
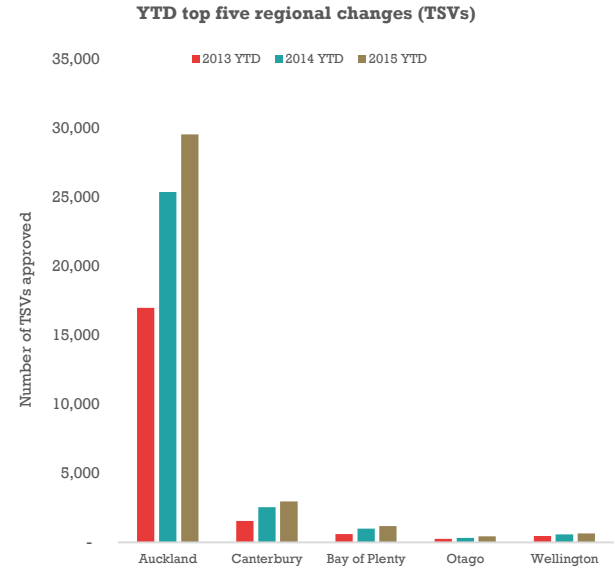
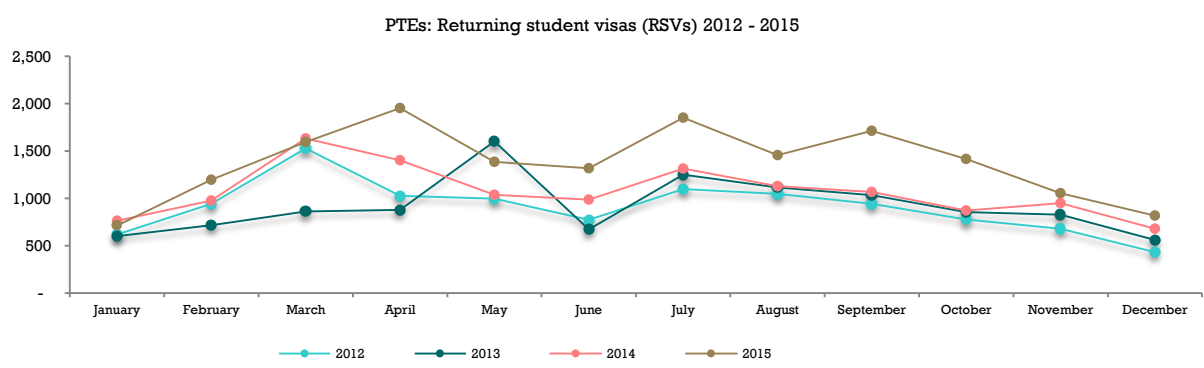
Number of TSVs approved



Number of FSVs approved



Number of RSVs approved



- Takeaways:
- 2015 was another strong year for the PTE sector with FSVs up 7% (1,284) and TSVs up 16% (4,943).
  - December results were mixed with FSVs down 11% (-161) and TSVs are flat down 1% (-22).
  - 81% of TSVs in 2015 were in the Auckland region.

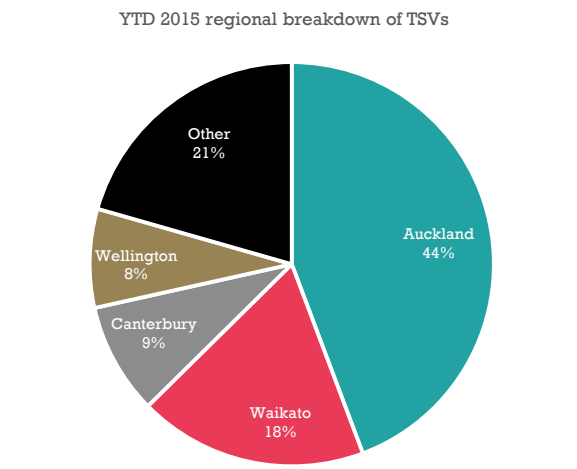
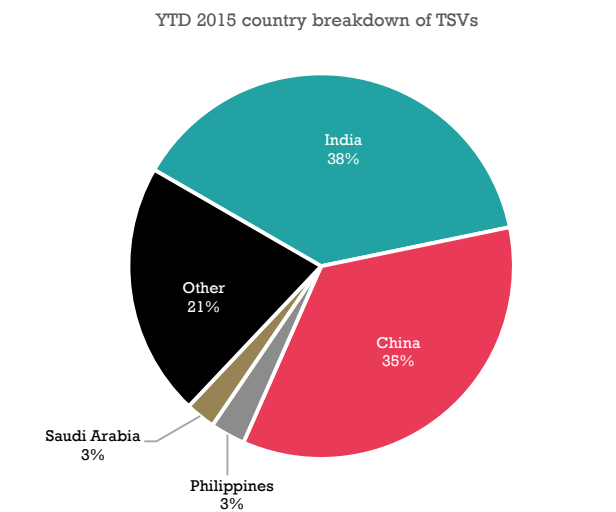
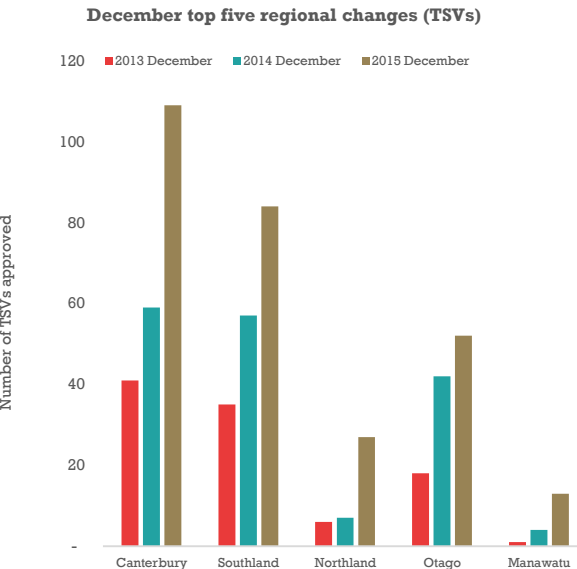
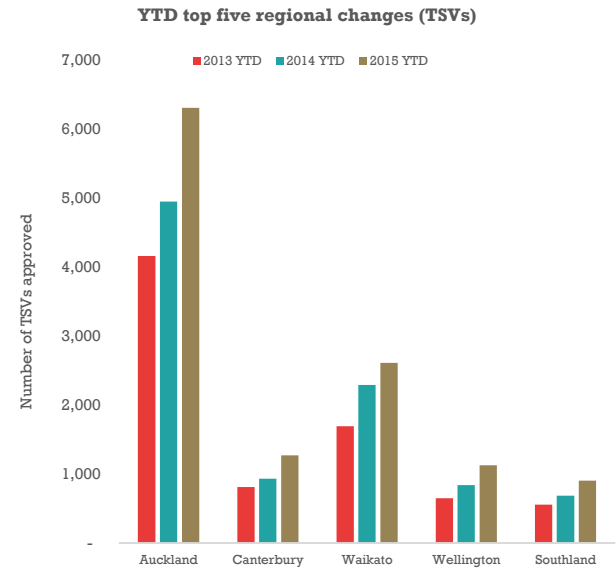
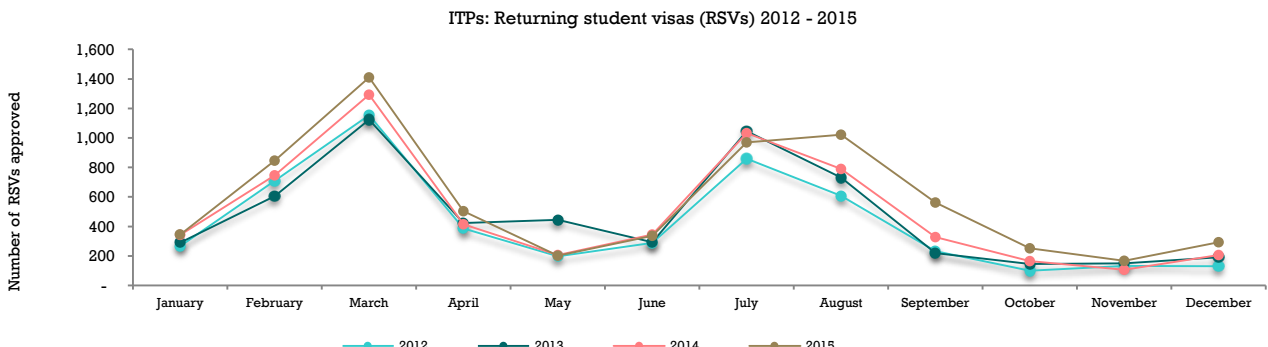
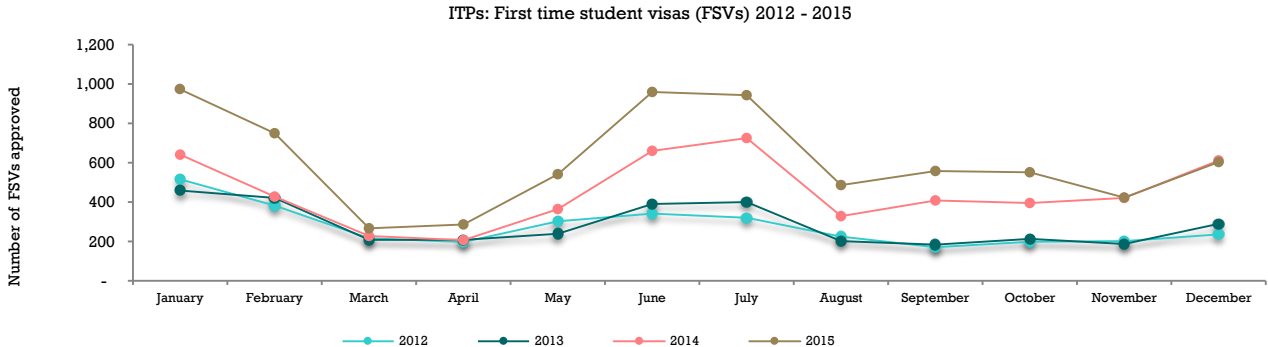
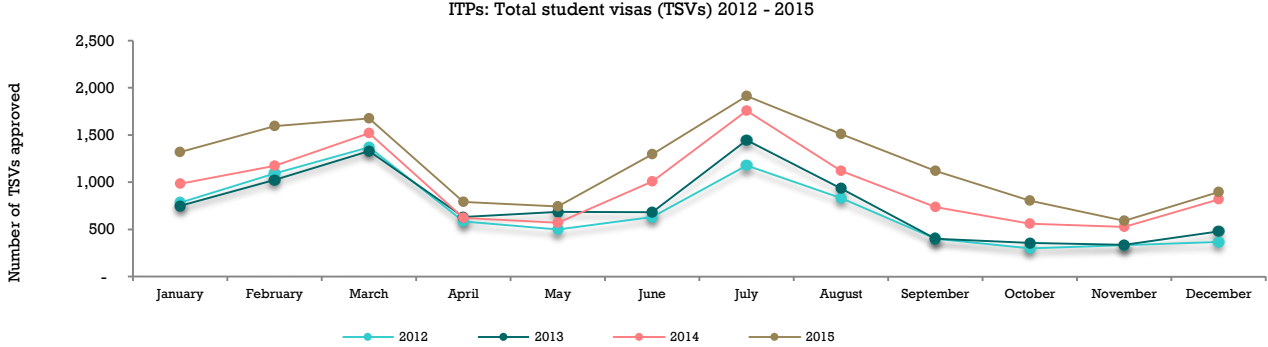


# Institutes of Technology and Polytechnics (ITPs):



December RSV	December FSV	December TSV
↑ 87 42%	→ -8 -1%	↑ 79 10%

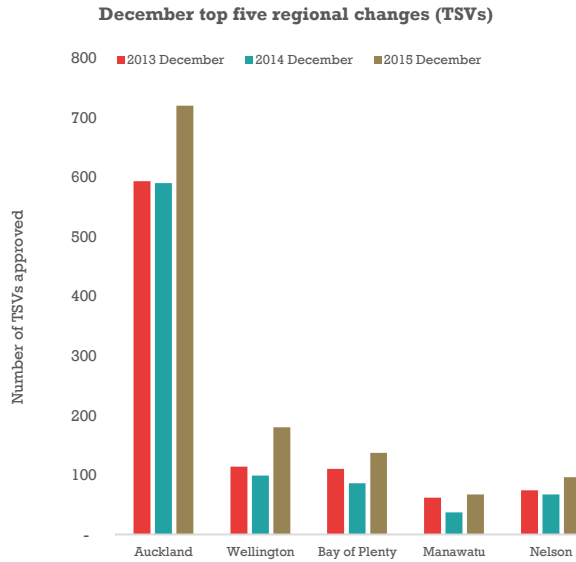
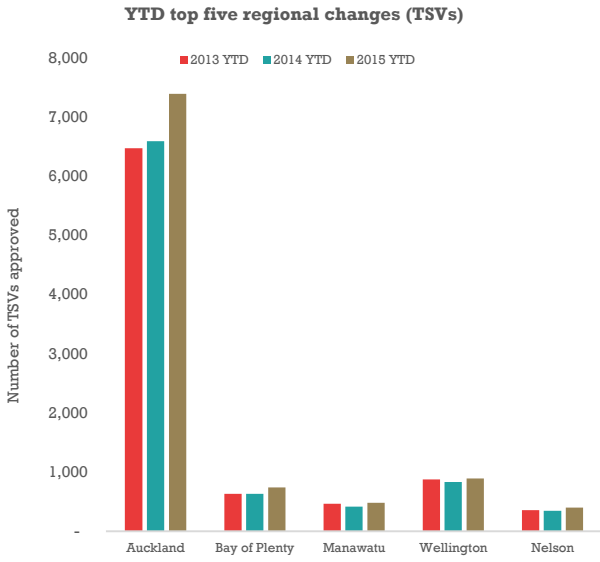
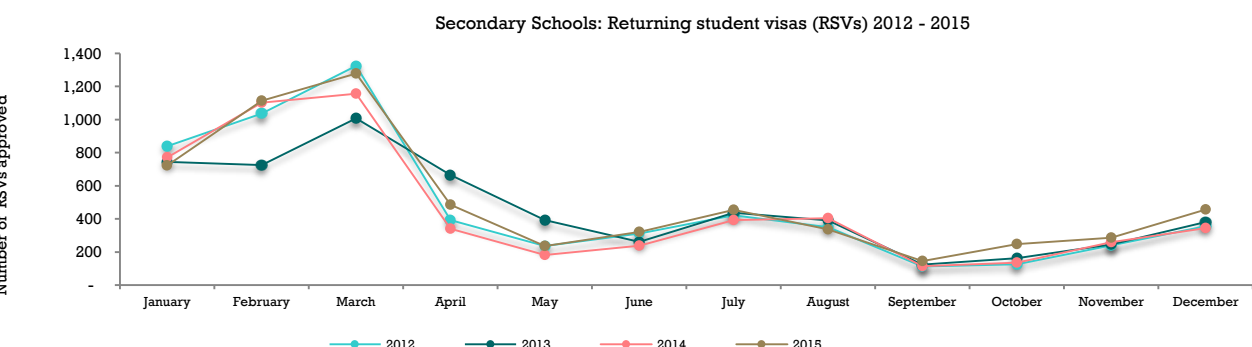
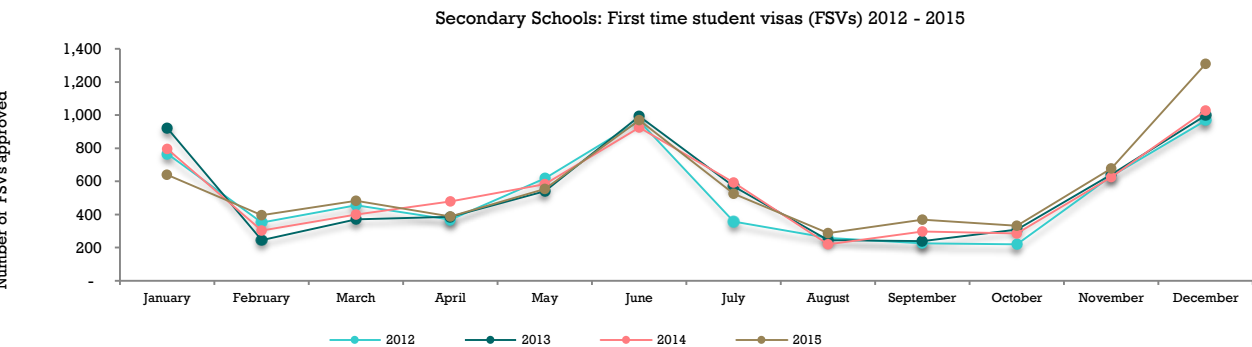
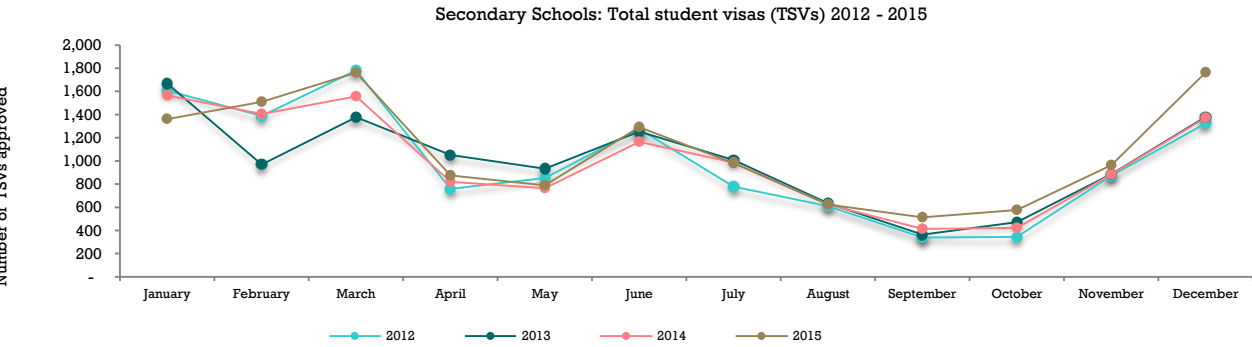
YTD RSV	YTD FSV	YTD TSV
↑ 929 16%	↑ 1,924 36%	↑ 2,853 25%



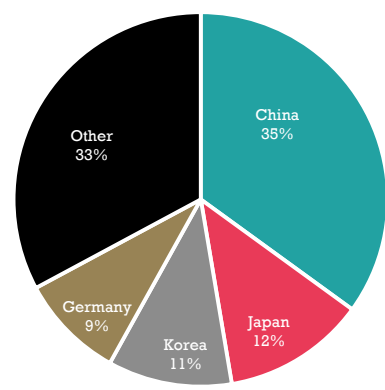
- Takeaways:
- ITPs have experienced strong growth in 2015 with TSVs up 25% (2,853) and FSVs up 36% (1,924).
  - December results were mixed with FSVs flat down 1% (-8) and TSVs up 10% (79).
  - The top four regions (Auckland, 44%; Waikato, 18%; Canterbury, 9%; and Wellington, 8%) together comprise 79% of total TSVs for the year.

# Secondary Schools:

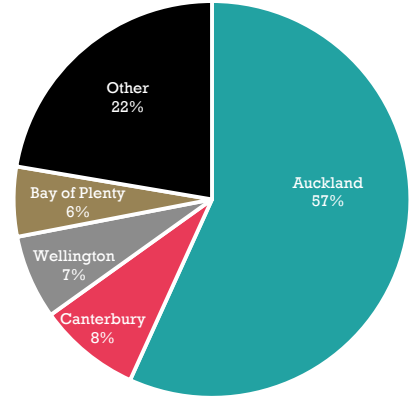
YTD (January - December)					
December RSV		December FSV		December TSV	
↑	111 32%	↑	281 27%	↑	392 29%
YTD RSV		YTD FSV		YTD TSV	
↑	639 13%	↑	394 6%	↑	1,033 9%



YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



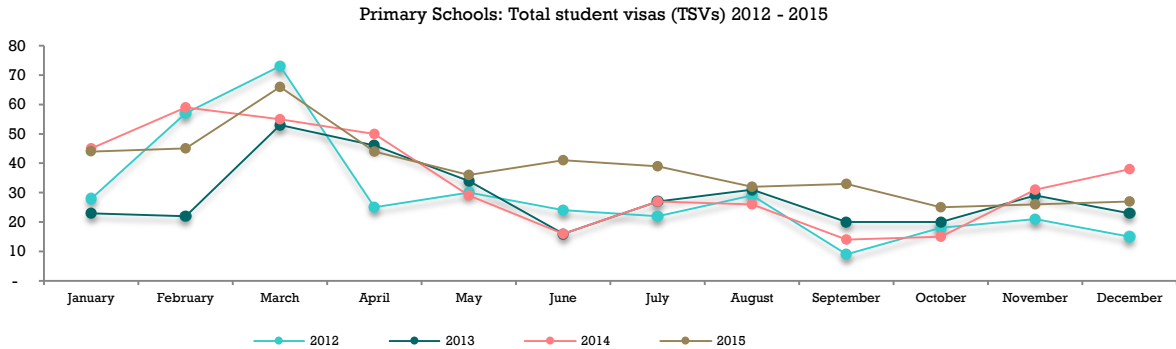
- Takeaways:
- Secondary Schools in 2015 experienced an increased of 9% (1,033) in TSVs, while FSVs are up 6% (394).
  - The top four regions (Auckland, 57%; Canterbury, 8%; Wellington, 7%; and the Bay of Plenty, 6%) together comprise approximately 78% of TSVs in 2015.
  - China is the largest contributor of TSVs in 2015, with 35% of the total followed by Japan with 12%.

# Primary Schools:

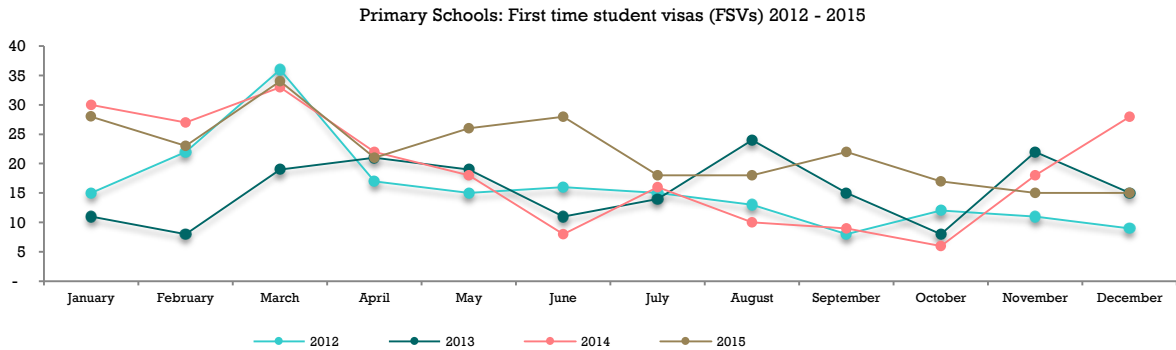


December RSV			December FSV			December TSV			YTD RSV			YTD FSV			YTD TSV		
↑	2	20%	↓	-13	-46%	↓	-11	-29%	↑	13	8%	↑	40	18%	↑	53	13%

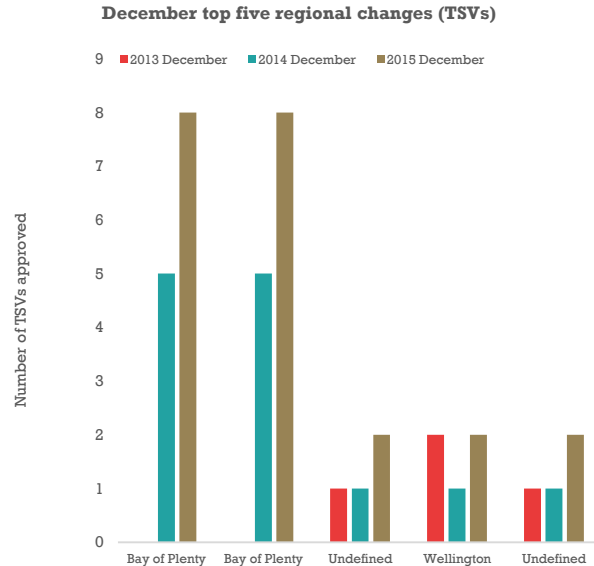
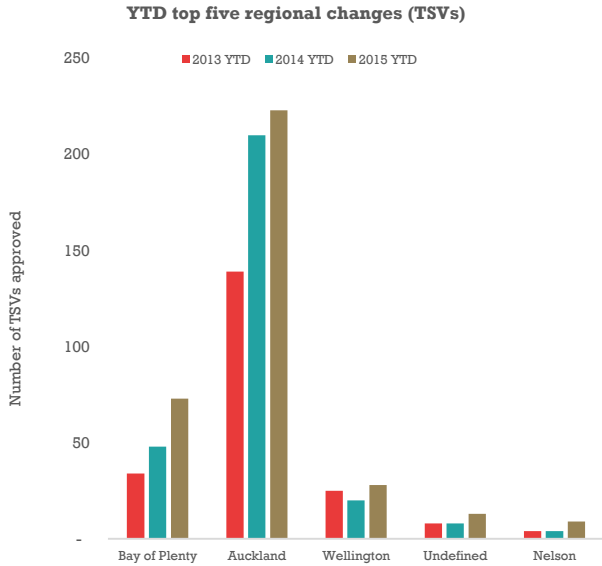
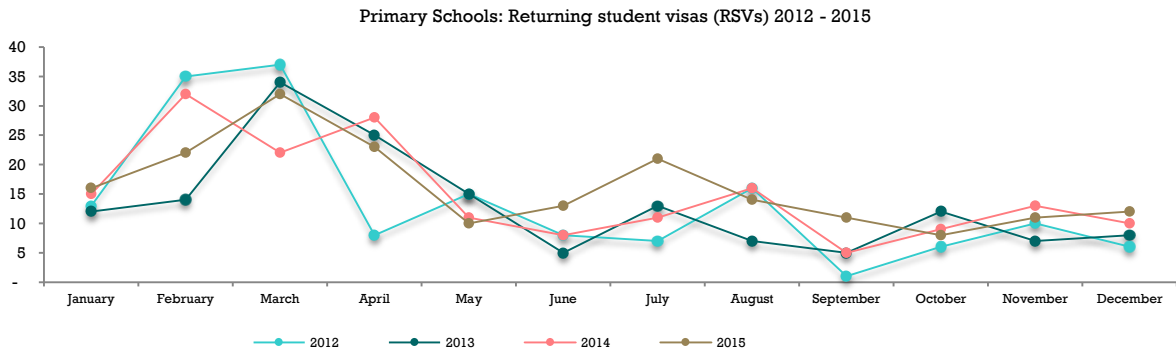
Number of TSVs approved



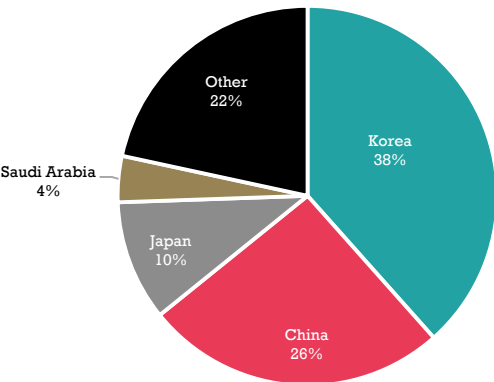
Number of FSVs approved



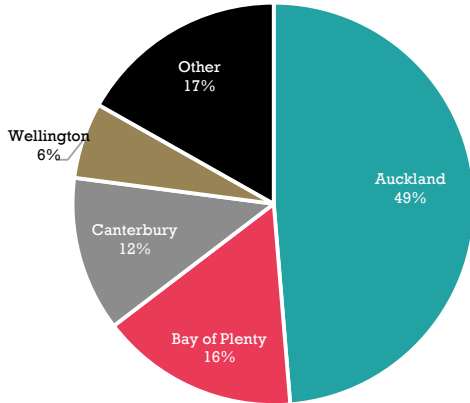
Number of RSVs approved



YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



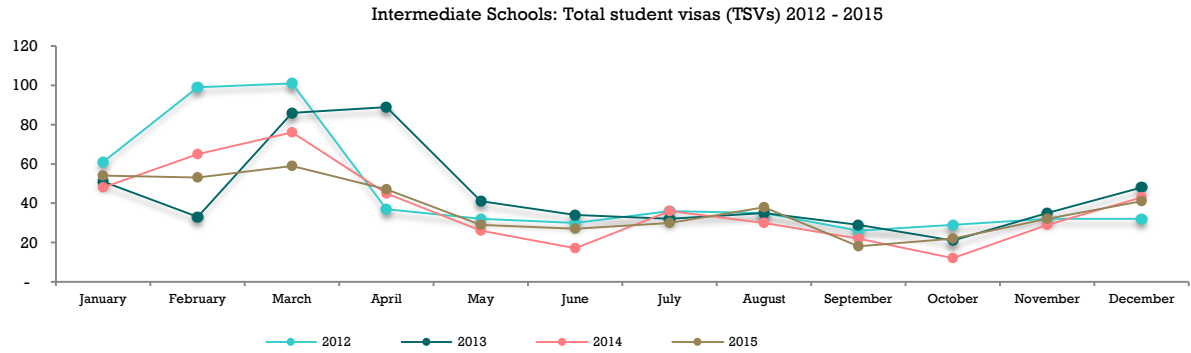
## Takeaways:

- Primary Schools have tracked positively during 2015, up 13% (53) in TSVs and FSVs up 18% (40).
- Auckland has 49% of all TSVs in 2015, Bay of Plenty with 16%, and Canterbury with 12%.
- Korea is the largest market for primary schools, comprising 38% of TSVs; followed by China, with 26% in 2015.

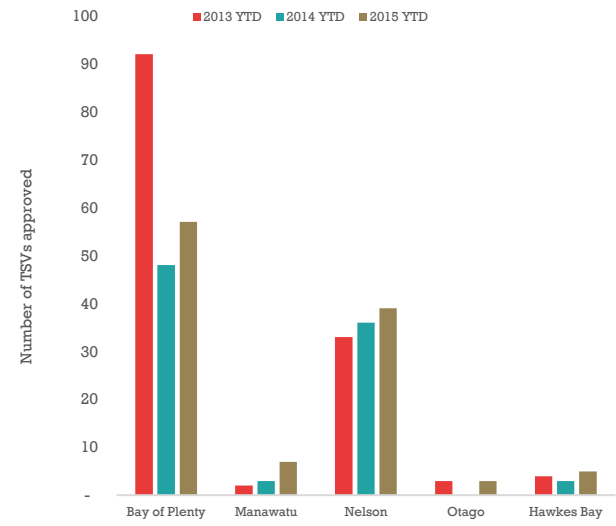
# Intermediate Schools:

December RSV	December FSV	December TSV	YTD RSV	YTD FSV	YTD TSV
 -1 -6%	 -1 -4%	 -2 -5%	 8 4%	 -7 -3%	 1 0%

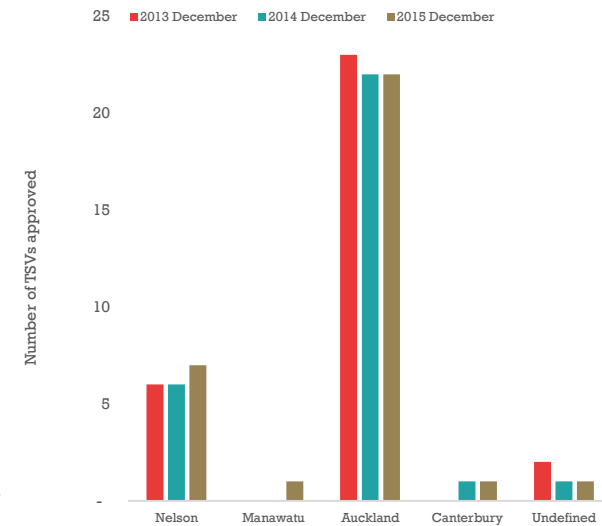
Number of TSVs approved



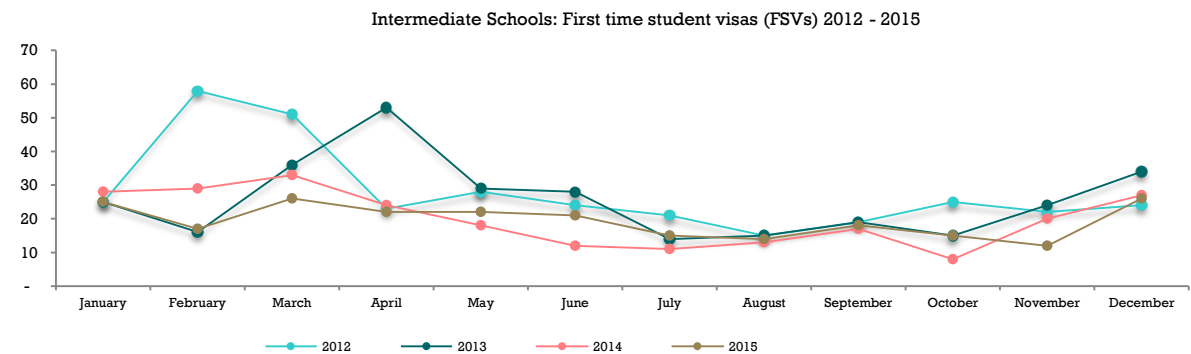
YTD top five regional changes (TSVs)



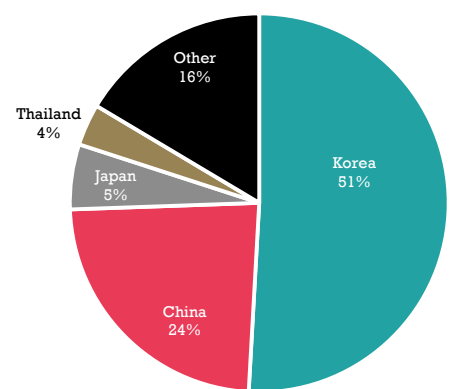
December top five regional changes (TSVs)



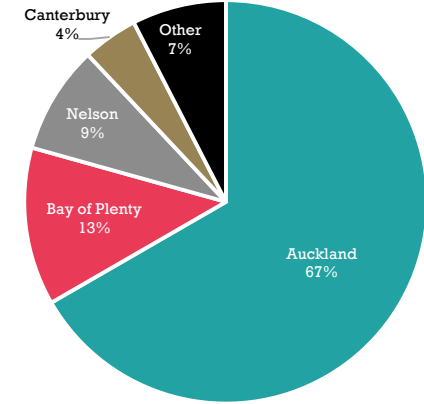
Number of FSVs approved



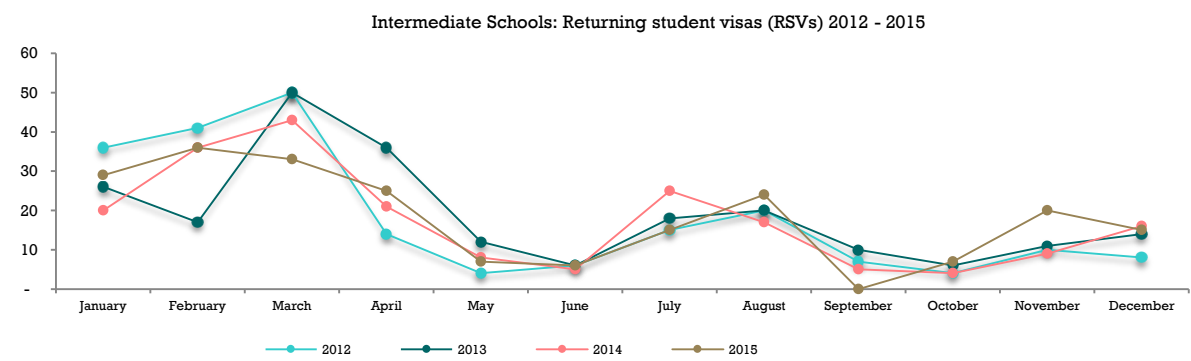
YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



Number of RSVs approved



- Takeaways:
- TSVs for Intermediate Schools sector have been flat during 2015, with TSVs flat 0% (1) and FSVs down 3% (-7). December results were mixed TSVs down 5% (-2) and FSVs flat, down 4% (-1).
  - Auckland has captured 67% of TSVs YTD, followed by the Bay of Plenty with 13% and Nelson with 9%.
  - Korea has contributed 51% of all TSVs while China contributed 24% in 2015.