Overall student visa trends

September 2016

NEW ZEALAND IMMIGRATION

Changes to the Student Visa Dashboard

- Education New Zealand's (ENZ) four year Excellence Horizon 2016-2020 Plan includes a "Step Change in Information Provision".
- As part of this, over the next couple of months ENZ will review their intelligence products, test different formats and trend comparisons and determine the best way to present the data.
- We are also actively seeking insights to explain any significant variances, which will be included as part of this Executive Summary going forward.
- ENZ has requested further detail from INZ on student visa information, such as approval rates for first time students, length of visas approved and programmes of study/institutes which students have received an offer of study for.
- ENZ continues to work closely with MoE and INZ to improve our data sharing arrangements and the way data is collected on international students, to more accurately reflect the industry.

Caveats and notes

1. Student visas vs. visitor visas:
   - Student visas only capture students who enter New Zealand with a student visa. These students are mostly those who are planning to study for more than three months.
   - Students who undertake a course less than three months in duration are not required to enter on a student visa. Students who do choose to enter on a visitor visa (usually from visa-free nationalities) are not captured in this dashboard.
   - Working Holiday Visas also allow students to study for up to six months. Those who enter NZ on a working holiday visa who plan on taking up this option are also not included in this dashboard
   - These factors will impact the Private Training Establishments (including English Language Schools) numbers.

2. Student visas vs. enrolments:
   - There is a potential delay of up to three months between students having their visas approved and their actual entry into New Zealand, therefore the figures shown here may not necessarily represent the actual number of students currently in New Zealand.

3. Other exclusions:
   - This dashboard excludes dependants, applicants under Section 61, and Variation of Conditions. Dashboards prior to May 2015 include approvals from "all" applicants, including dependants.

Executive Summary

1. Current YTD figures show that total student visas (TSV) are down -4% (-2,632) , first time student visas (FSV) are down 12% (-4,053) and returning student visas (RSV) are slightly up +4% (+1,421).

2. The seasonal peak in TSV that is usually seen in July didn't manifest this year. However RSVs between April and September period are up 10% compared to the same time period in 2015.

3. In September 2016 TSV (-1%, -38) were flat. FSV decreased by 18% (-637) while RSV were up 20% (+599) compared to September 2015.

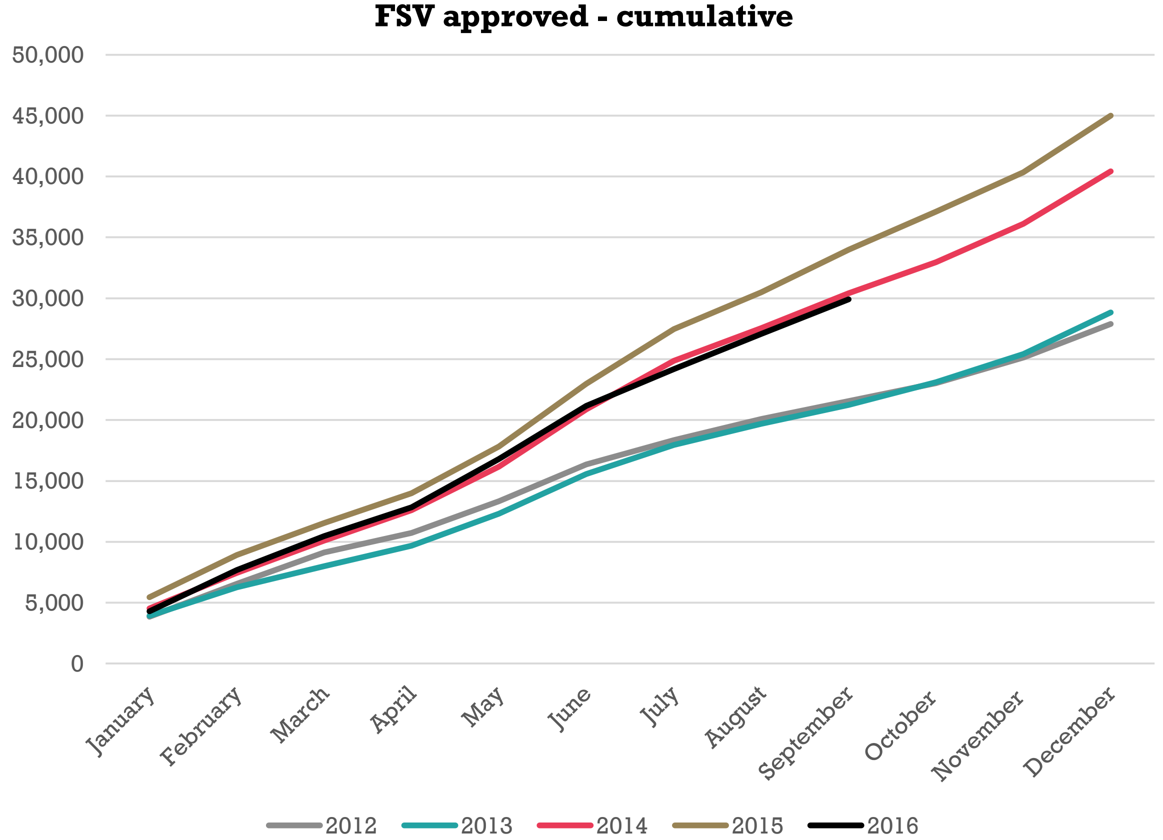
4. RSV for India and China are both up 9% YTD on 2015.

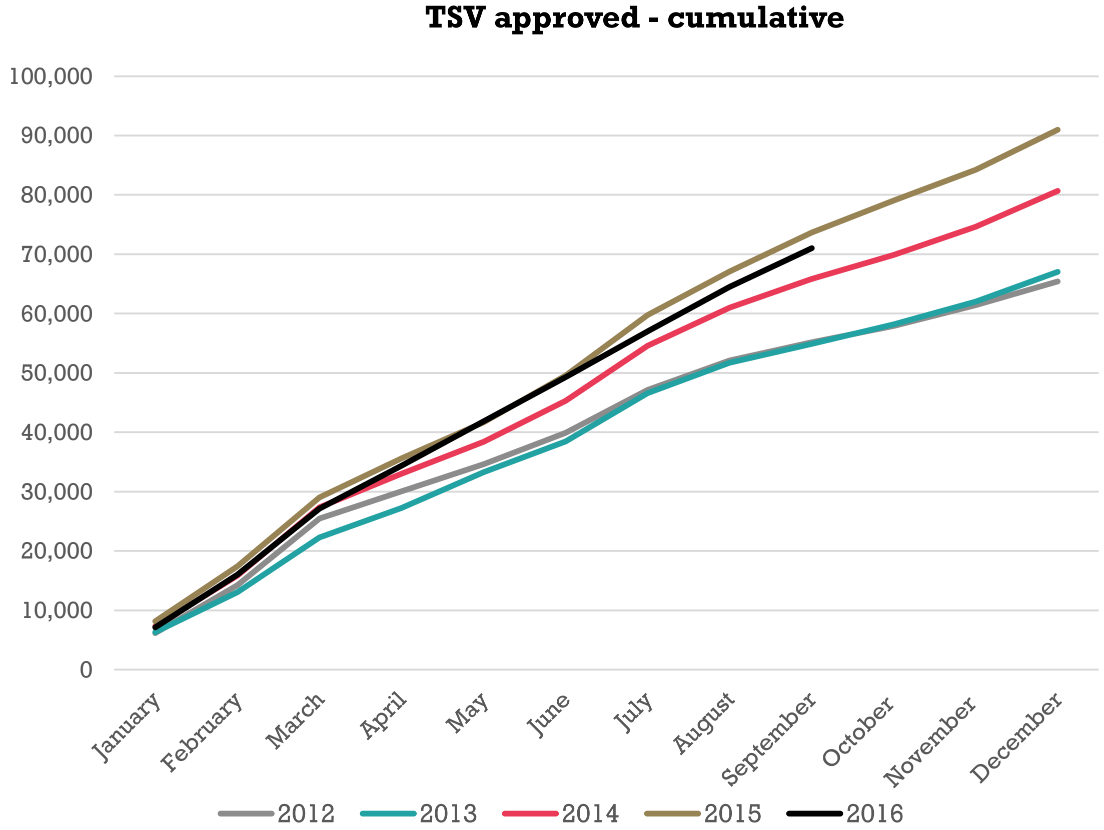
5. India, the Philippines, and Saudi Arabia, FSVs continue to decline compared to 2015 YTD:
   - India - has been affected by the changes in English Language requirements this has resulted in a decline in FSV YTD (-40%, -4,105) .
   - Philippines – another country affected by changes to English Language requirements - evidenced by the decline in FSV approved YTD (-785, -45%).
   - Saudi Arabia - a 35% reduction in TSV approved YTD (-634). The number of visas issued for Saudi Arabia YTD is the lowest since 2007. Interestingly there have only been 11 less FSV approved for this market YTD, suggesting that the decline is due to students not returning to, or remaining in New Zealand to study.
   - USA – YTD TSV are down 15% (-305), while FSV are down 18% (-322). The decrease in the USA market is artificial and caused by a processing 'hump' in early 2015. It is likely that a similar hump will appear in 2017 as a delay in processing of visas for the USA and other countries in the Americas has been reported. It is likely that current numbers also reflect the processing delay rather than a decrease in demand from the USA market.

6. China saw 8% growth in TSV for September YTD (2,142) which helped offset some of the decline from India.

7. China is up 392, and Korea and Japan have seen increases of over 100 FSV approved YTD 2016 compared to the same period last year. There has also been some promising growth from Indonesia, Germany, Viet Nam and Malaysia.

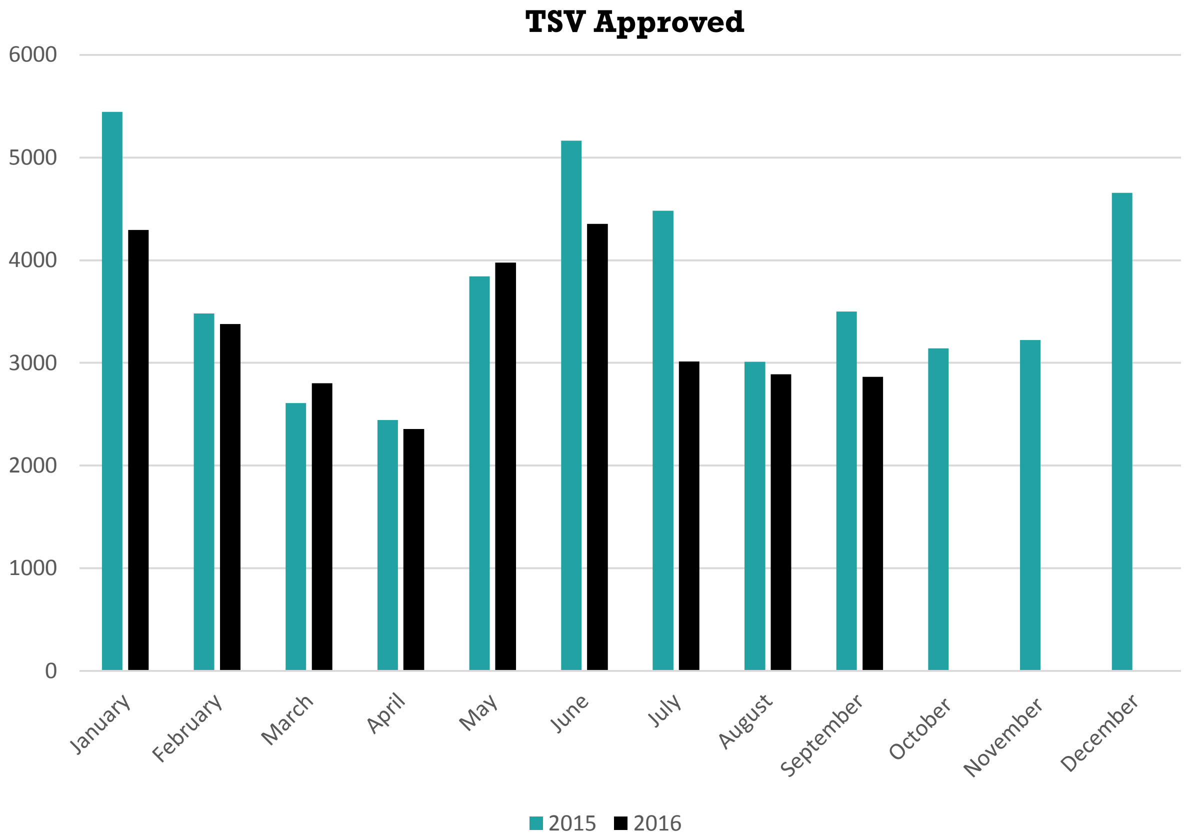
Comparison to previous years (Cumulative)

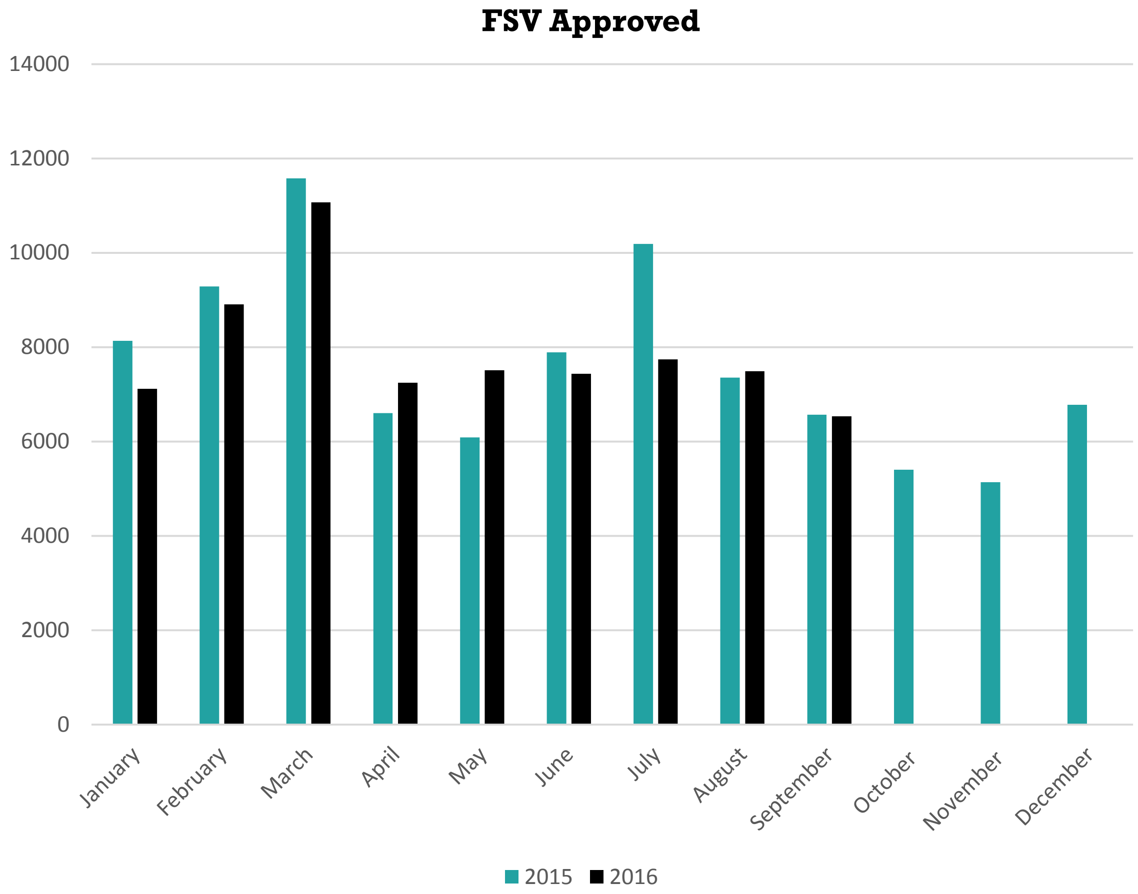




- Student visa data is down (-4%) compared to the same period last year, with 71,045 TSV approved in 2016 YTD compared to 73,677 in 2015 YTD.
- A drop in FSV from India (-4,105) and the Philippines (-785) has led the to a decline in FSV YTD.
- Overall FSV are down 12% (-4,053) from 2015 YTD. 29,928 were approved in 2016 YTD compared to 33,981 in 2015 YTD.
- While there is a decline in TSV and FSV YTD students choosing to renew their visas (RSV) is +4% with an additional 1421 students visas approved compared to the same time period last year.

Month-on-Month comparison to previous year





- September 2016 TSV (-18%, -637) declined compared to September 2015.
- FSV for September 2016 were flat (-2%, -38) were flat compared to September 2015. The decrease in FSV has been partially offset by the increase in RSV +20% (+599). However, RSV numbers may have been partially inflated due to visa processing issues.

Overall market performance (September 2016 Year-to-Date)

Top 20 markets (in order of 2016 volume)

FSVs Indicator	Market	2015 YTD	2016 YTD	Change in Numbers	% change
⇧	China	6,770	7,162	392	6%
⇩	India	10,283	6,178	-4105	-40%
⇧	Korea	1,510	1,615	105	7%
⇧	Japan	1,373	1,506	133	10%
⇩	USA	1,795	1,473	-322	-18%
⇨	Brazil	1,256	1,224	-32	-3%
⇧	Germany	1,030	1,106	76	7%
⇩	Philippines	1,744	959	-785	-45%
⇨	Thailand	852	837	-15	-2%
⇧	Colombia	554	587	33	6%
⇧	Malaysia	438	530	92	21%
⇧	Viet Nam	405	482	77	19%
⇨	Chile	373	373	0	0%
⇧	Indonesia	273	365	92	34%
⇩	Sri Lanka	389	348	-41	-11%
⇧	France	276	306	30	11%
⇩	UK	337	288	-49	-15%
⇧	Nepal	250	277	27	11%
⇧	Fiji	238	267	29	12%
⇧	Taiwan	221	258	37	17%

TSVs Indicator	Market	2015 YTD	2016 YTD	Change in Numbers	% change
⇧	China	24,881	27,023	2142	9%
⇩	India	16,984	13,580	-3404	-20%
⇩	Korea	4,033	3,855	-178	-4%
⇨	Japan	2,523	2,589	66	3%
⇨	Thailand	1,931	1,865	-66	-3%
⇩	USA	2,068	1,763	-305	-15%
⇨	Brazil	1,521	1,538	17	1%
⇧	Viet Nam	1,358	1,463	105	8%
⇩	Philippines	1,951	1,289	-662	-34%
⇧	Germany	1,210	1,276	66	5%
⇨	Malaysia	1,267	1,270	3	0%
⇩	Saudi Arabia	1,792	1,158	-634	-35%
⇨	Hong Kong	907	901	-6	-1%
⇧	Colombia	730	778	48	7%
⇧	Indonesia	631	741	110	17%
⇨	Taiwan	711	716	5	1%
⇩	Sri Lanka	732	682	-50	-7%
⇩	Fiji	720	661	-59	-8%
⇨	Nepal	567	551	-16	-3%
⇩	Russia	531	489	-42	-8%

- Markets that have seen significant increases in FSV YTD compared to the same time period last year: Japan growth has been in the PTE and ITP sectors, Indonesia has seen growth in PTE and secondary school sectors, Korean growth has been in the schools and PTE sectors and Germany has an increase in secondary schools visas YTD.
- Increases in FSV approvals in priority markets could be a positive indication that the market diversification strategy are starting to gain traction.

In-depth: Priority Markets – September 2016 YTD

Markets	FSV YTD	% Change from 2015	TSV YTD approval rates (%)
Promote			
China	7,162	6%	97%
India	6,178	-40%	62%
Japan	1,506	10%	99%
Korea	1,615	7%	99%
USA	1,473	-18%	98%
Brazil	1,224	-3%	96%
Colombia	587	6%	96%
Thailand	837	-2%	98%
Viet Nam	482	19%	90%
Philippines	959	-45%	78%
Indonesia	365	34%	97%
Germany	1,106	7%	99%
France	306	11%	99%
Sweden	76	10%	99%
Norway	120	-4%	99%
Italy	155	-8%	97%
Spain	113	35%	98%
Impact Projects			
Chile	373	0%	97%
Malaysia	530	21%	99%
Saudi Arabia	249	-4%	97%

Promote

- FSV for the YTD 2015 to the YTD 2016 increased for China (+6%,+392), Japan (10%,+133), and Korea (7%,+105)
- Decreases for FSVs were seen in India (-40%, -4015) and the Philippines (-45%,-785). These decreases can be attributed to the changes in rule 18.
- A decrease was also recorded for the USA market (-18%,-322). While this decrease seems significant, it should be noted that visas issued for the USA are on a par with visas issued for 2014.

Impact projects

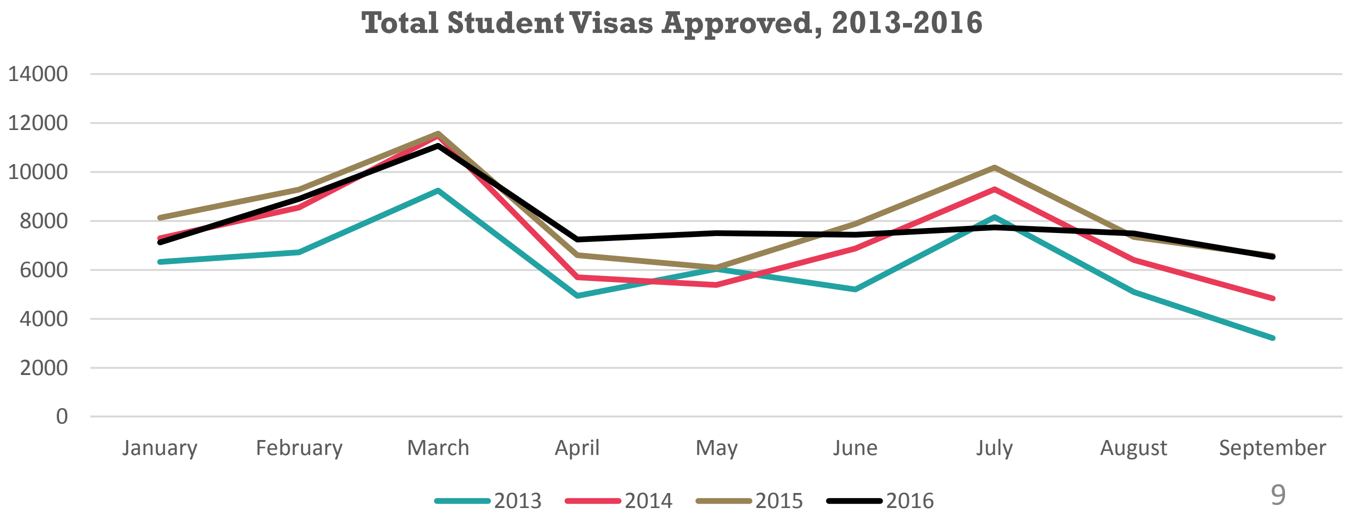
- Most Malaysian FSV YTD growth (+21%,+92) has been in the university sector (+19%,+71).

Market overview (September 2016 v September 2015)

- China led month-on-month increases for both RSVs (23%, +170) and TSVs (31%, +583).
- Increases of students for TSVs from September 2015 to September 2016 were also seen for Colombia (74%, +49) and Brazil (35%,+46)
- Decreases in TSVs were seen in the Indian (-45%, -581) and Philippine (-71%, -272) markets, which were led by increases in FSVs.

FSV Indicator	Market		Change	Percentage Change
↑	China		170	23%
↑	Colombia		35	78%
↑	Korea		24	15%
↑	Brazil		18	17%
↑	Taiwan		16	62%
↓	Indonesia	-	20	-30%
↓	Bangladesh	-	21	-68%
↓	Nepal	-	25	-49%
↓	Philippines	-	272	-71%
↓	India	-	581	-45%

TSV Indicator	Market	Change	Percentage Change
↑	China	582	31%
↑	Colombia	49	74%
↑	Brazil	46	35%
↑	Korea	28	9%
↑	Hong Kong	21	57%
↓	Bangladesh	-25	-36%
↓	Saudi Arabia	-50	-34%
↓	Nepal	-84	-60%
↓	Philippines	-263	-66%
↓	India	-407	-19%



Sector overview (September 2016 YTD)

Primary	Intermediate	Secondary	ITP	PTE	University
TSV 0% (-1) FSV -9% (-20)	TSV +16% (+50) FSV +28% (+45)	TSV +4% (+367) FSV +2% (+88)	TSV -0% (-7) FSV -9% (-520)	TSV -11% (-3,281) FSV -23% (-3,605)	TSV 1% (+330) FSV 1% (+60)

- The PTE sector has experienced the largest decline in TSV approved YTD, down 11% (-3,281). This is being driven by the decline in FSV (-23%, -3,605).

- India PTE FSV declined -56% and ITP FSV -19% YTD. The Philippines PTE FSV declined -51% and Bangladesh -80%.

- The secondary school sector has seen steady growth in TSV YTD with China (+14%, +522), Germany (+9%, +69) and Viet Nam (28%, +55) all up on the same time period last year.

- University FSV are flat. The USA (-14%, -265) and Saudi Arabia (-33%, -263) are both down YTD while China (+742, 7%)
- India (+15%, +152) have seen strong growth in YTD 2016.

Sector overview (September 2016 v September 2015)

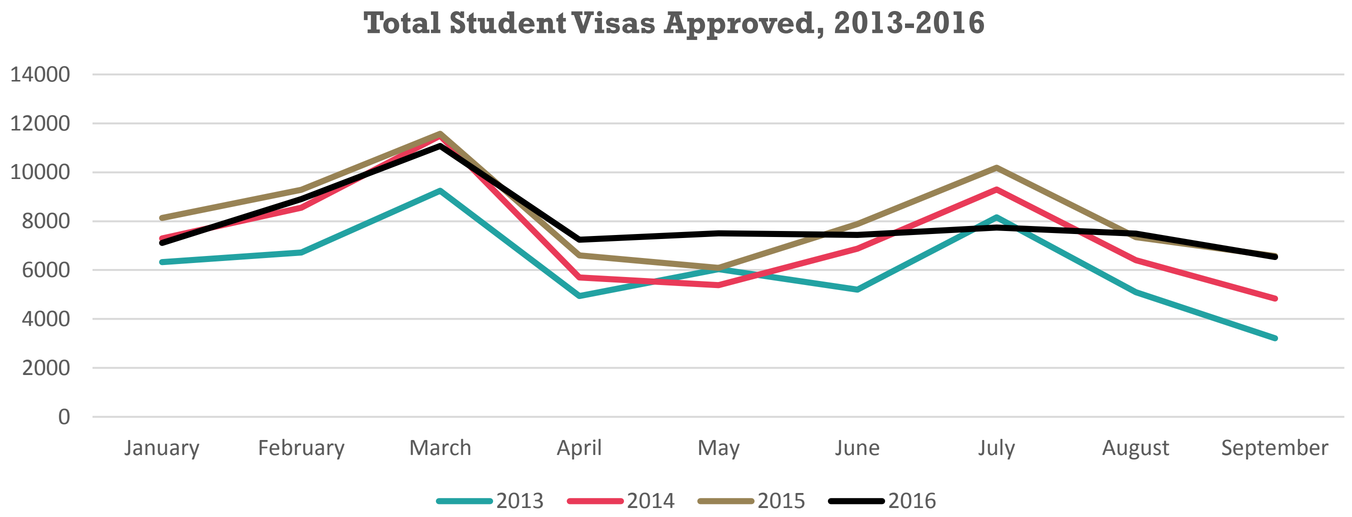
- The University sector saw the largest increase in TSV approved for September 2016, with both RSV and FSV increasing.
- University FSV growth in September came from China (42%, +194) and India (+62% +40) while Saudi Arabia had the largest decline (-35%, -23).
- The decline in the PTE sector TSV is driven by the decline in FSV. In particular, a drop in FSV from India (-58%, -542) and the Philippines (-71%, -228).
- While the India decline continues to have a negative effect on the PTE sector results, China (+22%, +69) and Brazil (38%, +32) have seen growth in FSV compared to September 2015.

FSV

Market	Change in Numbers	% change
Universities	60	18%
Intermediate	12	80%
Primary	12	52%
Secondary	-6	-2%
ITPs	-70	-13%
PTEs	-645	-29%

TSV

Market	Change in Numbers	% change
Universities	242	25%
Secondary	93	18%
ITPs	68	6%
Intermediate	20	133%
Primary	10	29%
PTEs	-471	-12%



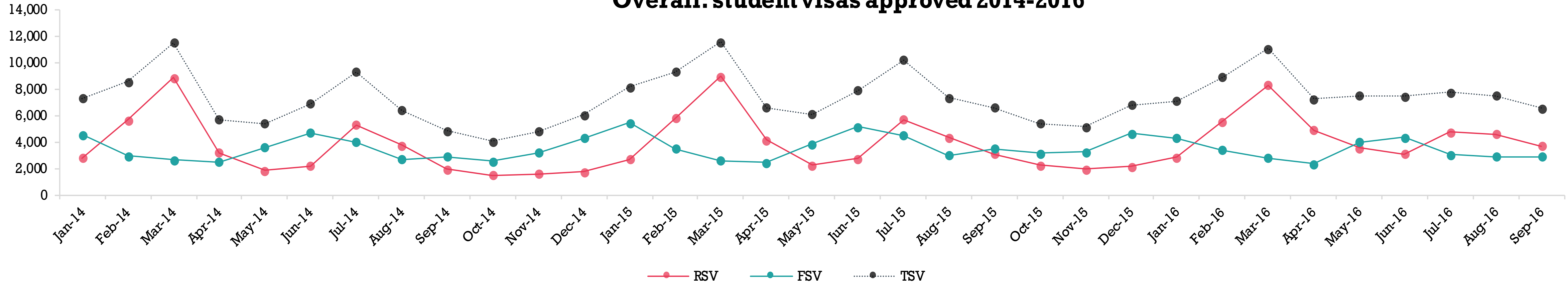
Trends by market

Overall:

September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
599 ⇧ 20%	-637 ⇩ -18%	-38 ⇨ -1%	1,421 ⇨ 4%	-4,053 ⇩ -12%	-2,632 ⇨ -4%

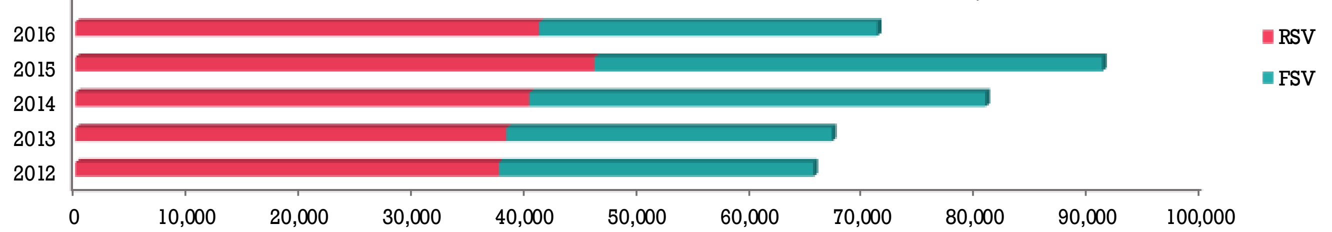
YTD (September)

Overall: student visas approved 2014-2016

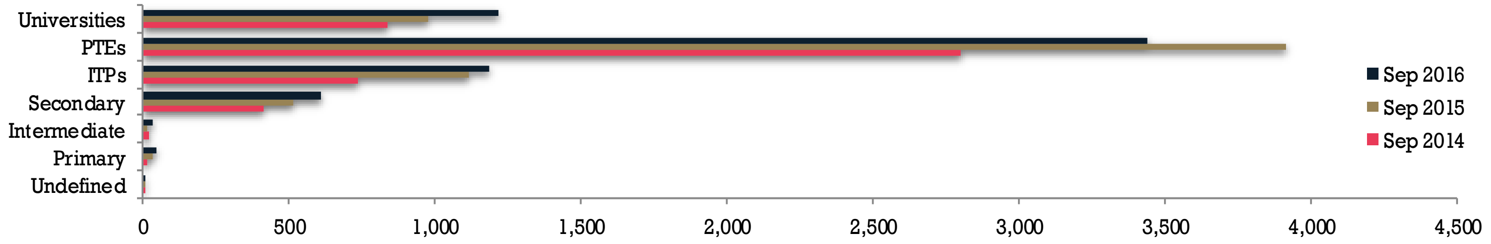


Overall: 2016 YTD TSV regional change

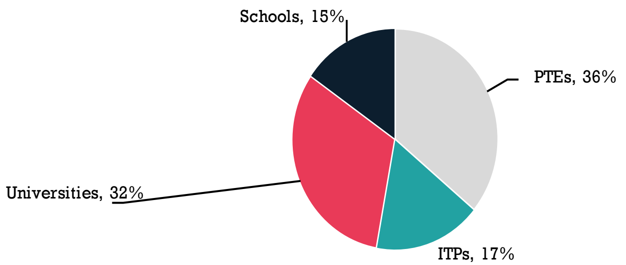
Overall: Annual Cumulative total for RSV vs. FSV, 2012-2016



Overall: Total student visas approved by sector, September



Overall: 2016 YTD Sector breakdown of TSV



Key takeaways:

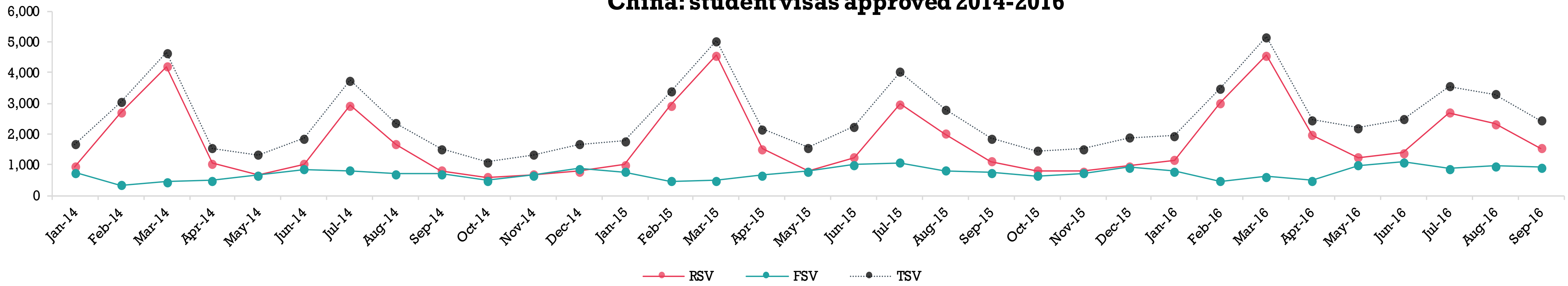
- Current YTD figures show that total student visas (TSV) are down (-4%) and first time student visas (FSV) are down 12%.
- September 2016 experienced a -1% decrease for TSV (38) driven by an decrease in FSV -18% (637) compared to September 2015.
- The PTE sector make up 36% of TSV approved while the university sector makes up 32% YTD.

China:

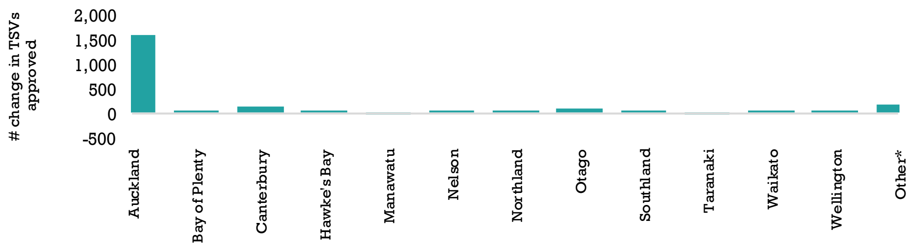
YTD (September)

September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
412 37%	170 23%	582 31%	1,750 10%	392 6%	2,142 9%

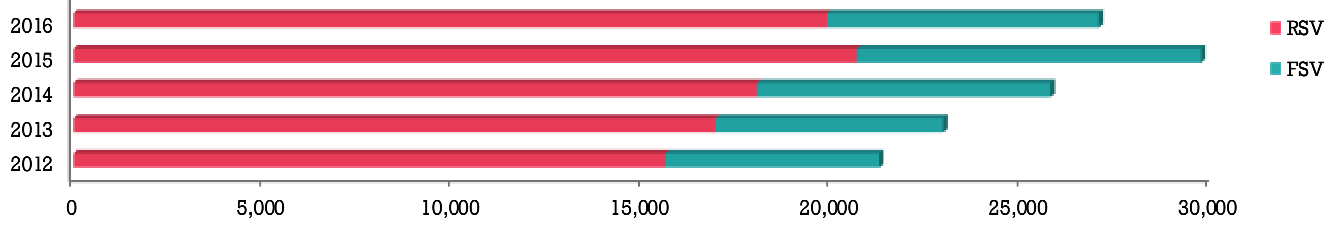
China: student visas approved 2014-2016



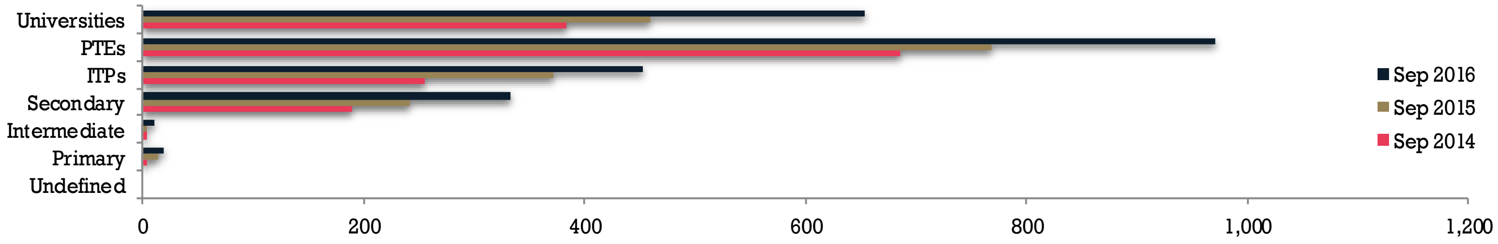
China: 2016 YTD TSV regional change



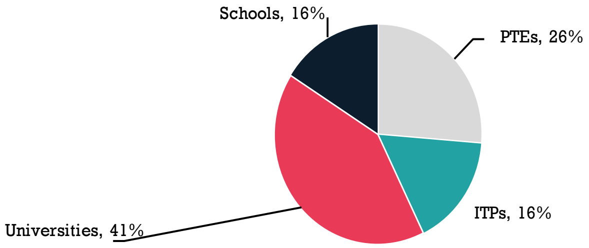
China: Annual Cumulative total for RSV vs. FSV, 2012-2016



China: Total student visas approved by sector, September



China: 2016 YTD Sector breakdown of TSV



Key takeaways:

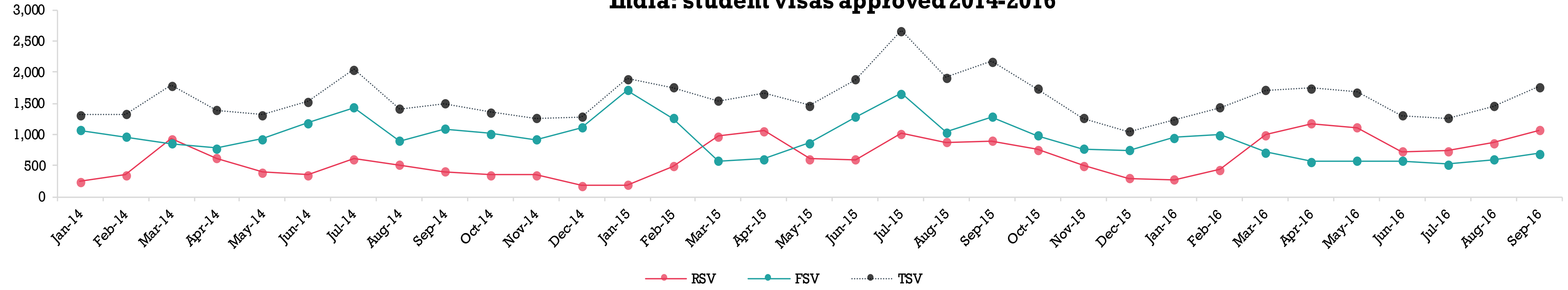
- TSV approved for China has increased by 9% YTD (+2,142). This is being driven by an 10% increase in RSV (+1,750) while FSV rose 6% (+392).
- September 2016 saw an increase in TSV, 31% (+582) which was largely attributed to the rise in RSV for September 23% (+170) compared to September 2015.

India:

September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
174 ↑ 19%	-581 ↓ -45%	-407 ↓ -19%	701 ↑ 10%	-4,105 ↓ -40%	-3,404 ↓ -20%

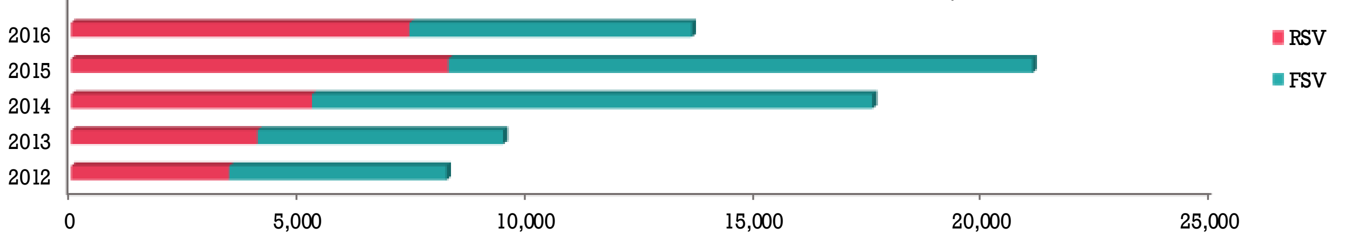
YTD (September)

India: student visas approved 2014-2016

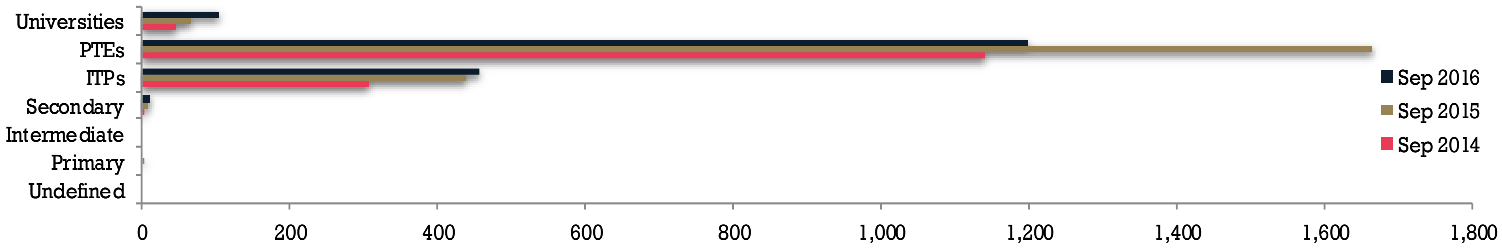


India: 2016 YTD TSV regional change

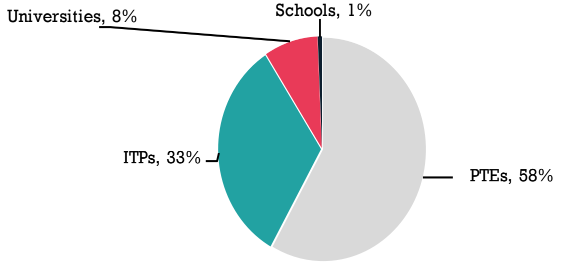
India: Annual Cumulative total for RSV vs. FSV, 2012-2016



India: Total student visas approved by sector, September



India: 2016 YTD Sector breakdown of TSV



Key takeaways:

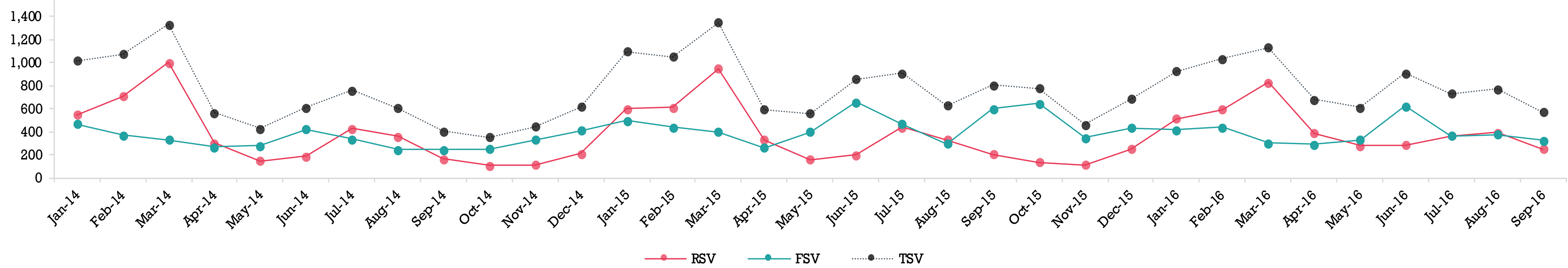
- YTD results for India continue to be much lower than the same period last year, with TSV down 20% (-3,404). This is being driven by a 40% (-4,105) decline in FSV to date, following the change in English language requirements (Rule 18) in Oct – Nov 2015.
- However India is experiencing an increase in RSV (+10%, +701) suggesting students are choosing to return/remain in New Zealand to study.

South East Asia:

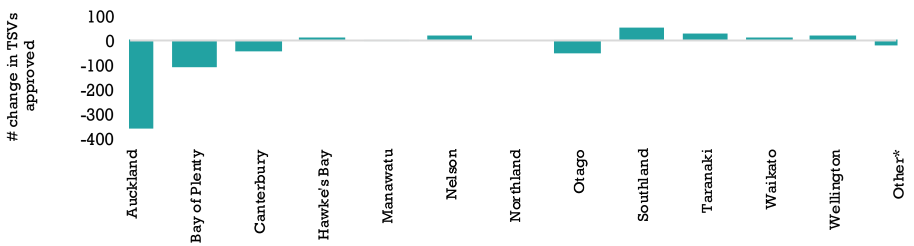
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
43 21%	-276 -46%	-233 -29%	64 2%	-559 -14%	-495 -6%

YTD (September)

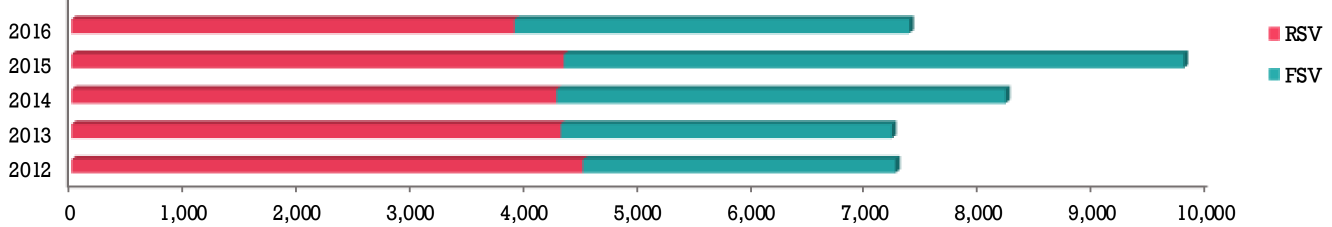
South East Asia: student visas approved 2014-2016



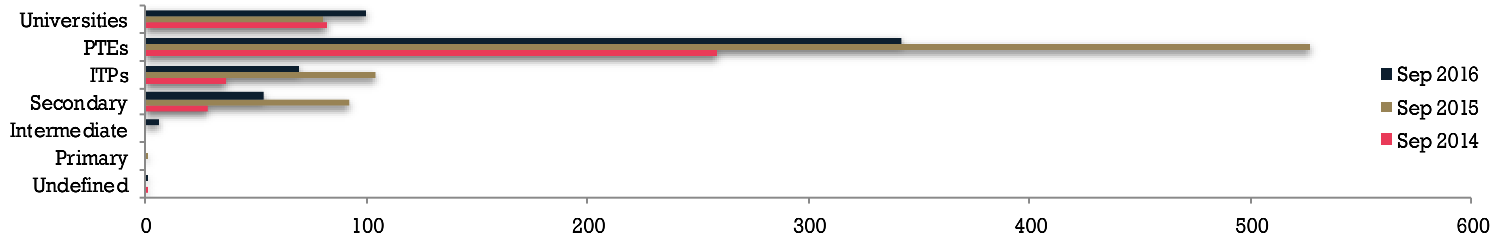
South East Asia: 2016 YTD TSV regional change



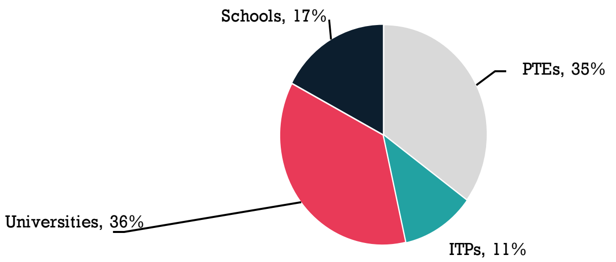
South East Asia: Annual Cumulative total for RSV vs. FSV, 2012-2016



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



South East Asia: 2016 YTD Sector breakdown of TSV



Key takeaways:

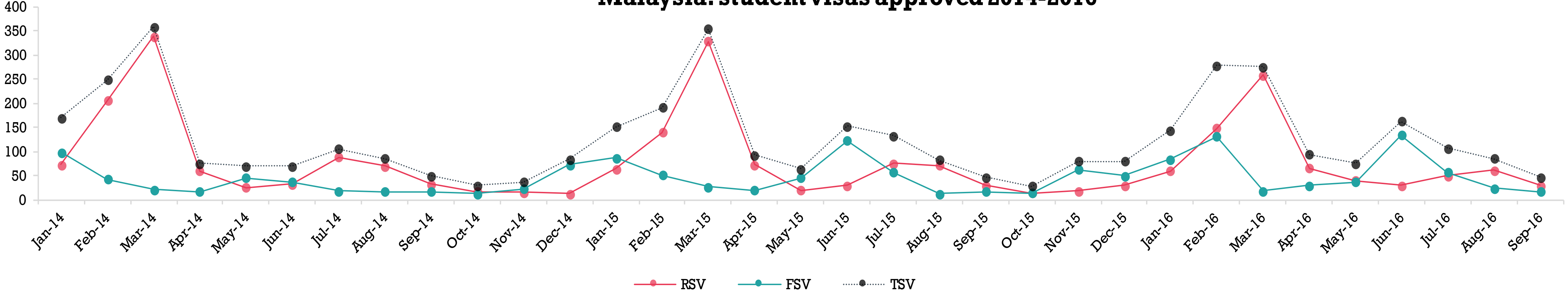
- Results for the South East Asia region are down YTD (-4%, -261). While FSV are still tracking down (-14%, -559), RSV have appeared to stabilise (+2%, +64).
- September 2016 TSV saw an downturn of -29% (-233) compared with September 2015. This is being driven by the decrease in FSV of -46% (-276), which is partially being offset by a 21% (+43) increase in RSV.
- So far this year, students from the South East Asia region are choosing to study at universities (36%), PTEs (35%) and schools (17%).

Malaysia:

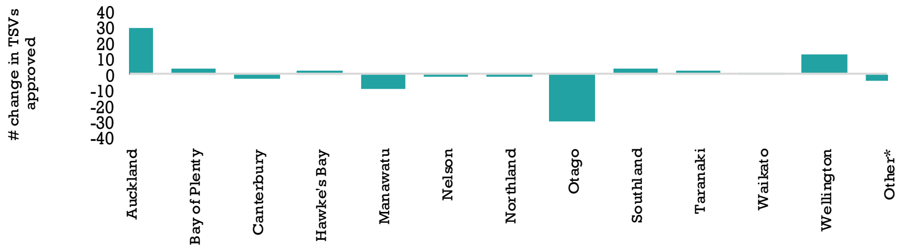
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
0 ⇨ 0%	0 ⇨ 0%	0 ⇨ 0%	-89 ⇩ -11%	92 ⇧ 21%	3 ⇨ 0%

YTD (September)

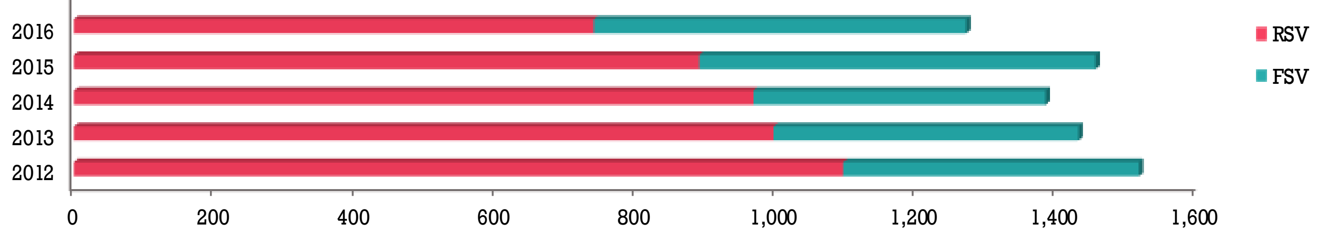
Malaysia: student visas approved 2014-2016



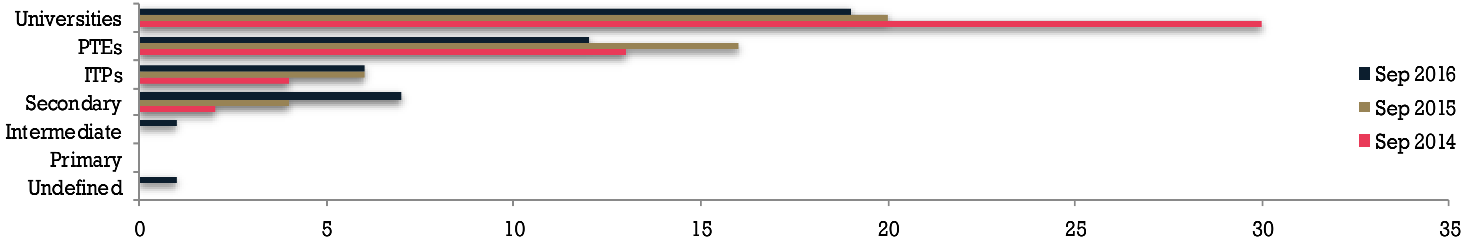
Malaysia: 2016 YTD TSV regional change



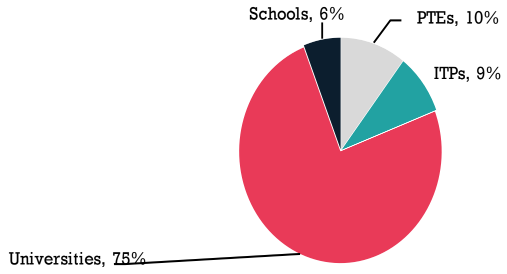
Malaysia: Annual Cumulative total for RSV vs. FSV, 2012-2016



Malaysia: Total student visas approved by sector, September



Malaysia: 2016 YTD Sector breakdown of TSV



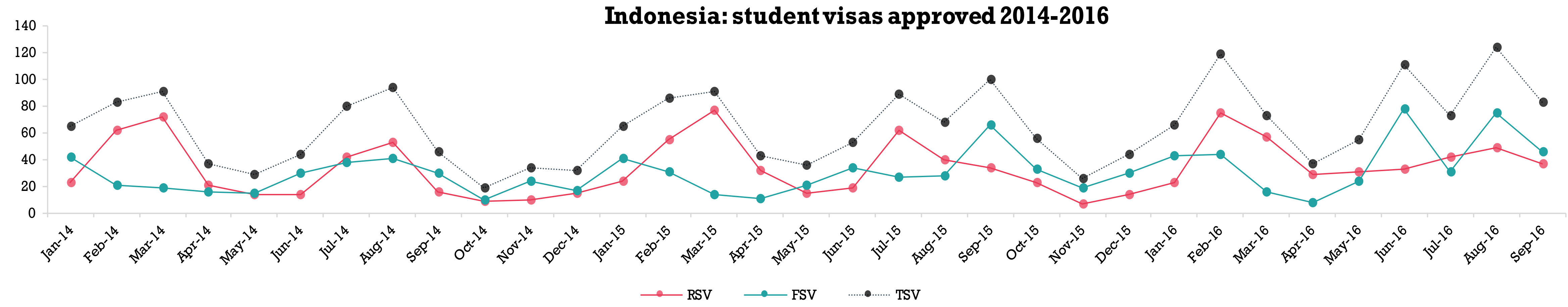
Key takeaways:

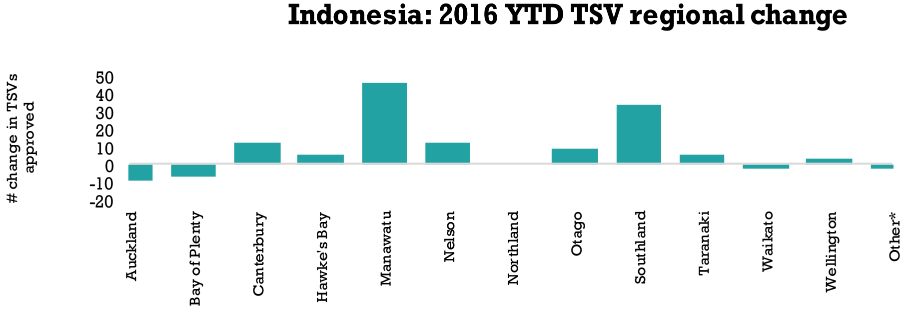
- TSV approved for Malaysia remains stable YTD. Although an increase was seen in FSV (+21%, +92), this was offset by a decline in RSV (-11%, -89).
- The university sector made up the majority of TSV approved YTD (75%).
- An increase was evident in the Auckland, Wellington and Southland regions, while Otago saw a decline in Malaysian students YTD.

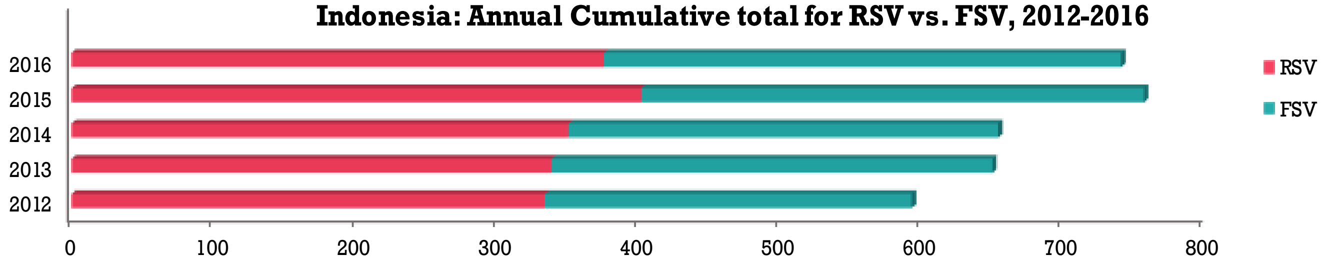
Indonesia:

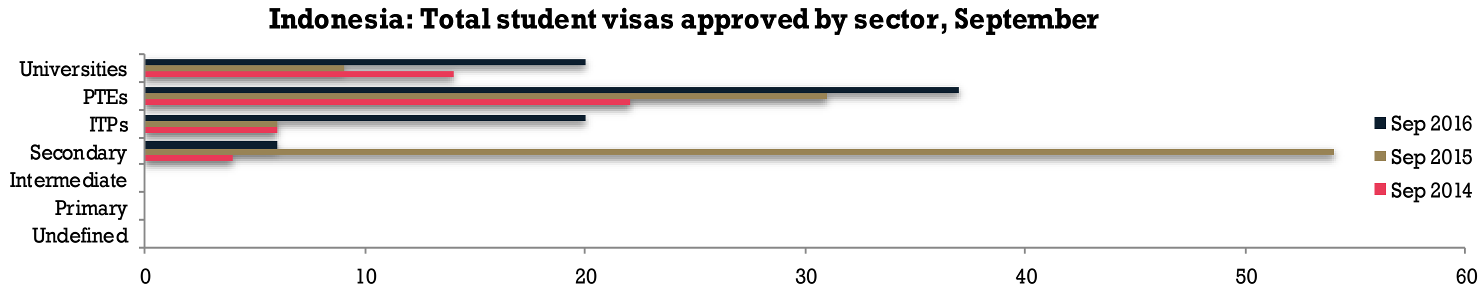
September RSV		September FSV		September TSV		YTD RSV		YTD FSV		YTD TSV	
3	⇧ 9%	-20	⇩ -30%	-17	⇩ -17%	18	⇧ 5%	92	⇧ 34%	110	⇧ 17%

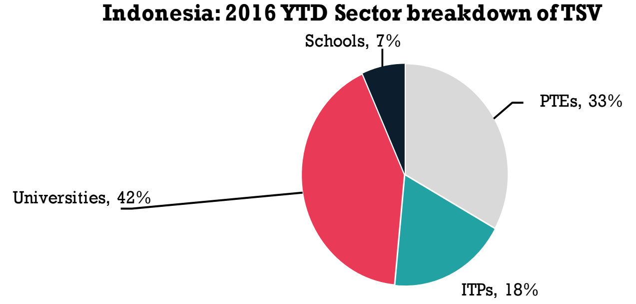
YTD (September)











Key takeaways:

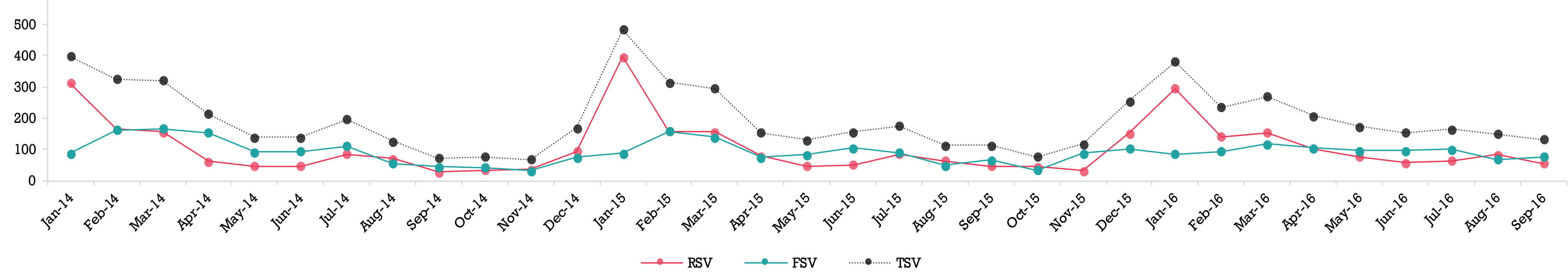
- Results for Indonesia are positive YTD, with TSV up 17% (+110). This is being driven by FSV (+34%) while RSV has moderately increased (+5%).
- The university sector comprises 42% of TSV YTD followed by the PTE sector with 33%.
- The increase in TSV YTD is evident in the Manawatu and Southland regions in particular.

Thailand:

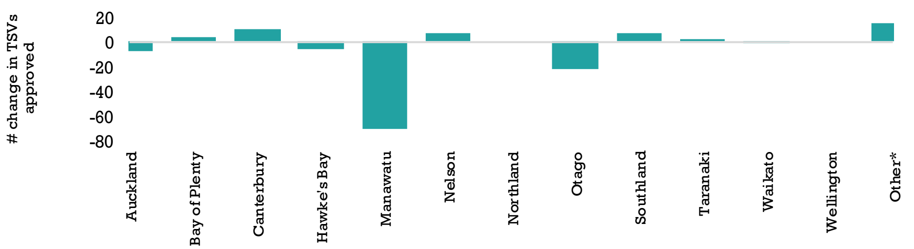
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
10 ↑ 22%	11 ↑ 17%	21 ↑ 19%	-51 ↓ -5%	-15 ⇨ -2%	-66 ⇨ -3%

YTD (September)

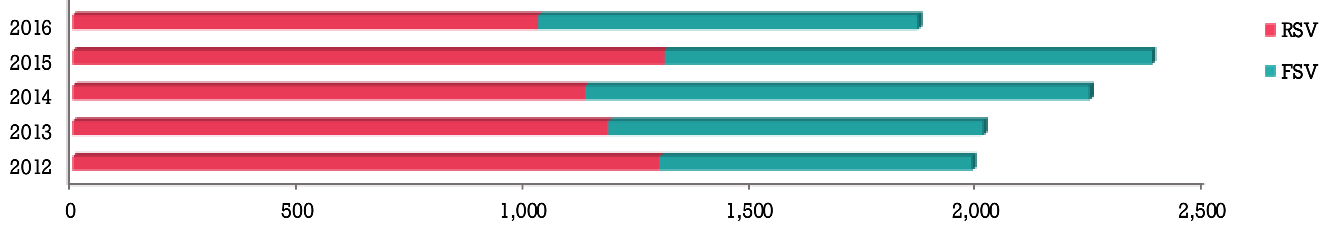
Thailand: student visas approved 2014-2016



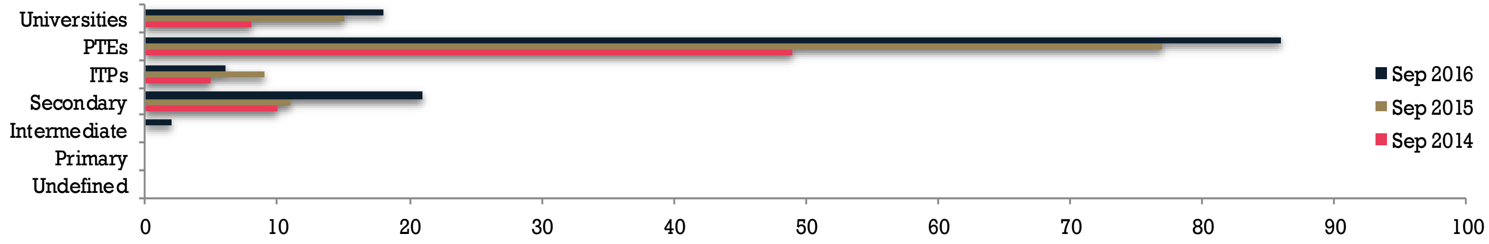
Thailand: 2016 YTD TSV regional change



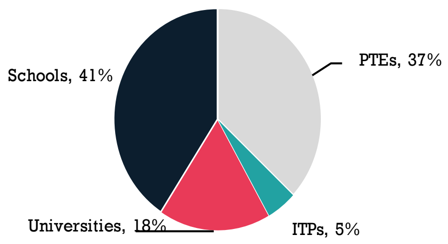
Thailand: Annual Cumulative total for RSV vs. FSV, 2012-2016



Thailand: Total student visas approved by sector, September



Thailand: 2016 YTD Sector breakdown of TSV



Key takeaways:

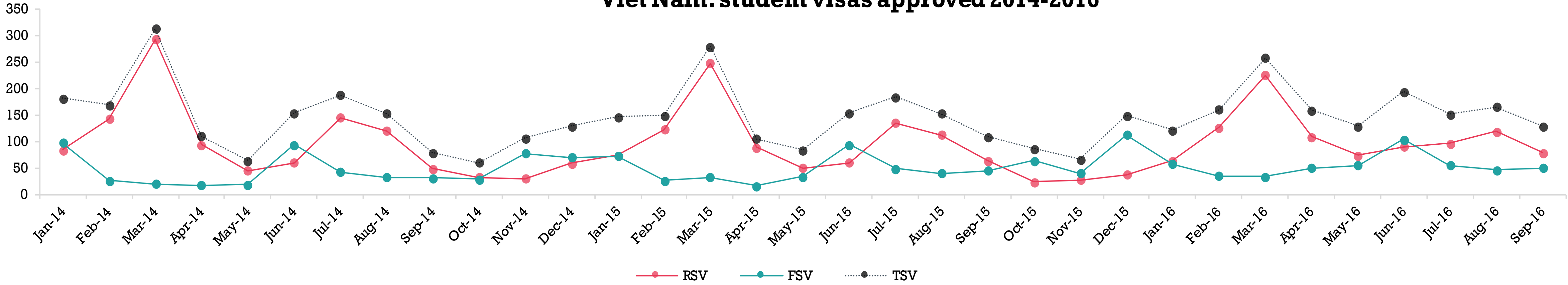
- September 2016 saw an increase in TSV for Thailand compared to September 2015 up 19% (+21). However YTD results continue to be lower than the same period last year (TSV down -3%, -66) being driven by a reduction in both RSV and FSV.
- The schools sector make up the majority of TSV approved YTD (41%), followed by the PTE sector with 37%. The decrease in Thai students has been seen in the Auckland, Manawatu and Otago regions YTD.

Viet Nam:

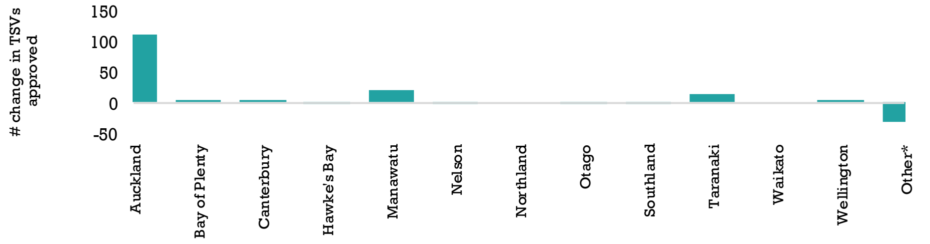
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
15 ⇧ 23%	5 ⇧ 11%	20 ⇧ 19%	28 ⇨ 3%	77 ⇧ 19%	105 ⇧ 8%

YTD (September)

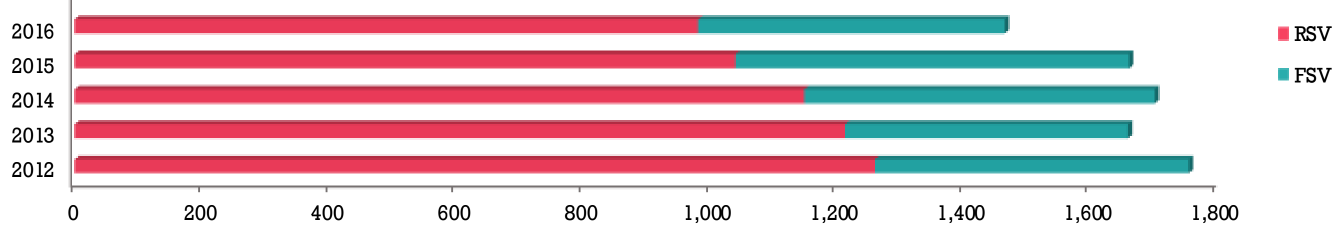
Viet Nam: student visas approved 2014-2016



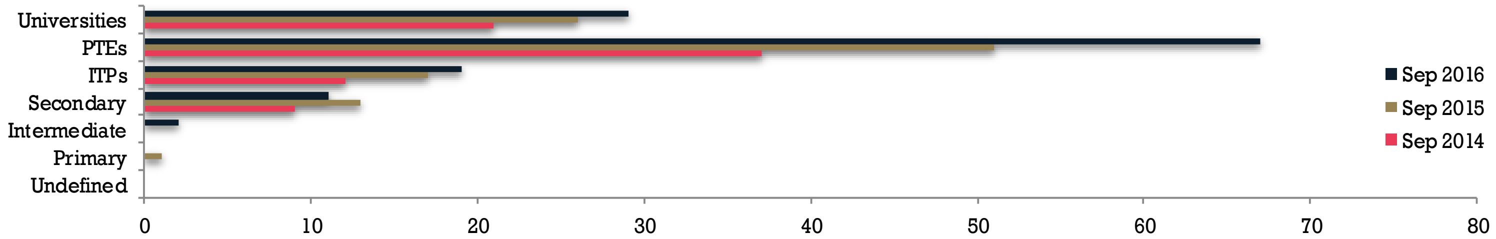
Viet Nam: 2016 YTD TSV regional change



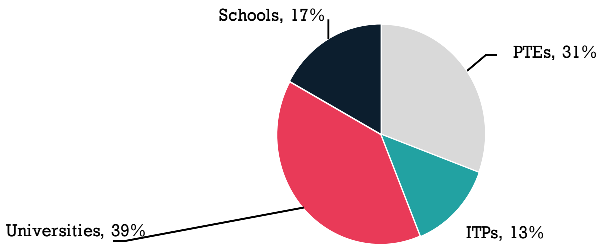
Viet Nam: Annual Cumulative total for RSV vs. FSV, 2012-2016



Viet Nam: Total student visas approved by sector, September



Viet Nam: 2016 YTD Sector breakdown of TSV



Key takeaways:

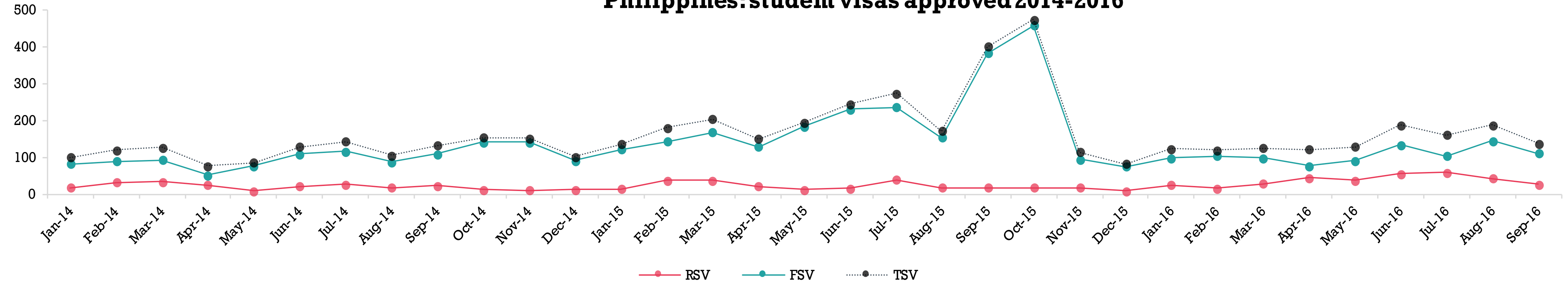
- Viet Nam is tracking well YTD with FSV up 8% (+105) and TSV up (+19%, +77). September 2016 also saw positive results as compared with September 2015, with increases across the board. TSV up 19% (+20).
- 39% of TSV YTD approved were in the university sector and 31% in the PTE sector. The majority of the positive growth observed in the Viet Nam market is occurring in the Auckland region.

Philippines:

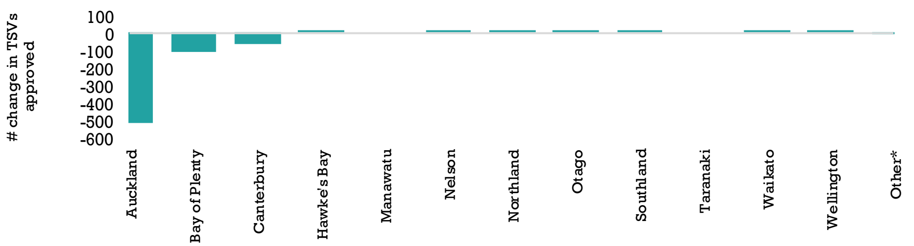
YTD (September)

September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
9 ↑ 53%	-272 ↓ -71%	-263 ↓ -66%	123 ↑ 59%	-785 ↓ -45%	-662 ↓ -34%

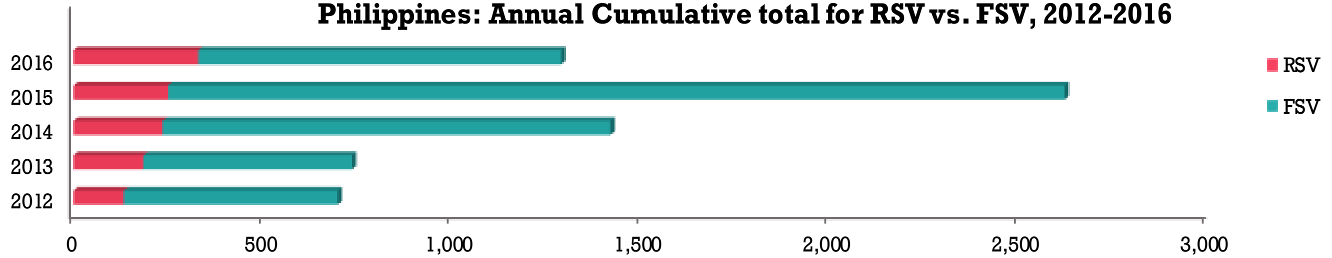
Philippines: student visas approved 2014-2016



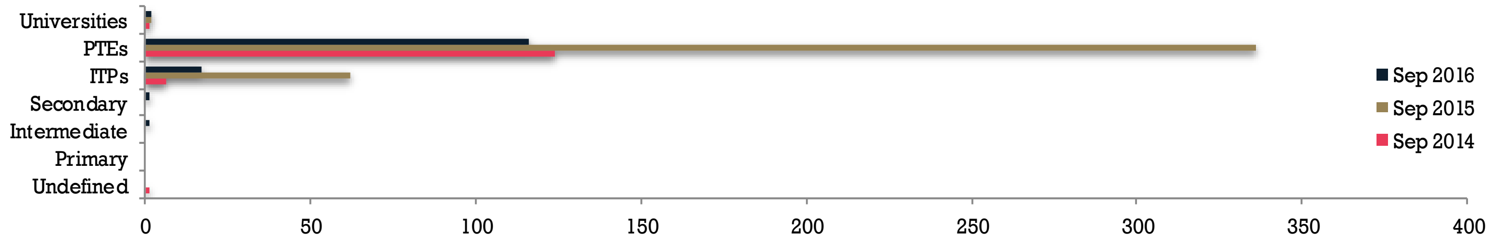
Philippines: 2016 YTD TSV regional change



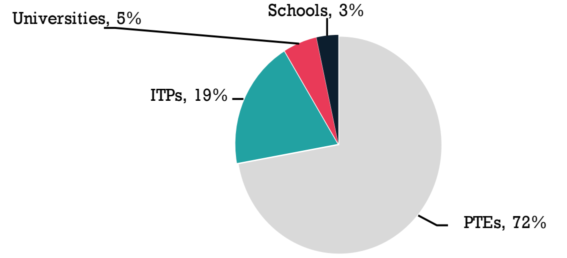
Philippines: Annual Cumulative total for RSV vs. FSV, 2012-2016



Philippines: Total student visas approved by sector, September



Philippines: 2016 YTD Sector breakdown of TSV



Key takeaways:

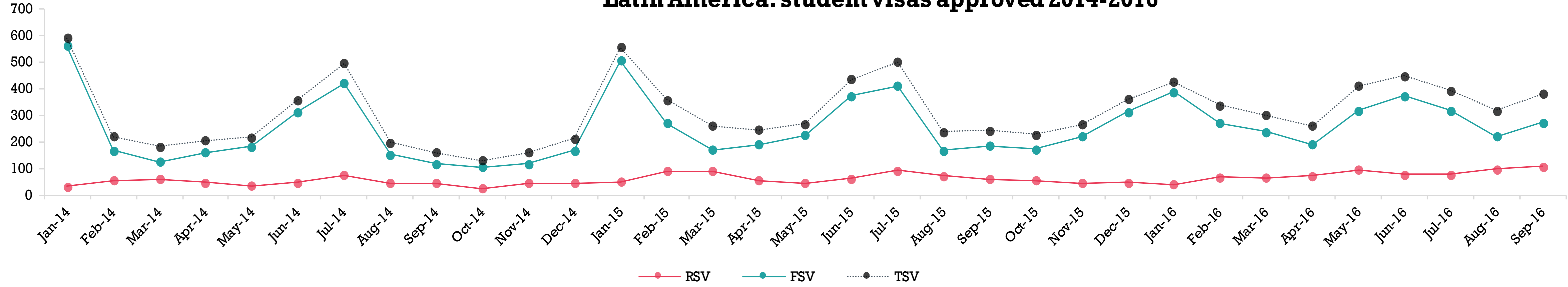
- FSV approved from the Philippines remain down YTD (-34%, -662), whilst RSV is up YTD (+59%, 123) partially softening the overall decline in TSV down to the tune of -45% (-785). This decline follows an exceptional year of growth in 2015 that would be hard to match. The change in English language requirements (Rule 18) that took place in 2015 has had an immediate effect on the number of student visas from the Philippines. This is a changing market and we expect to see an increase in students studying towards degree and postgraduate studies.
- 97% of TSV approved were in the tertiary sector.

Latin America:

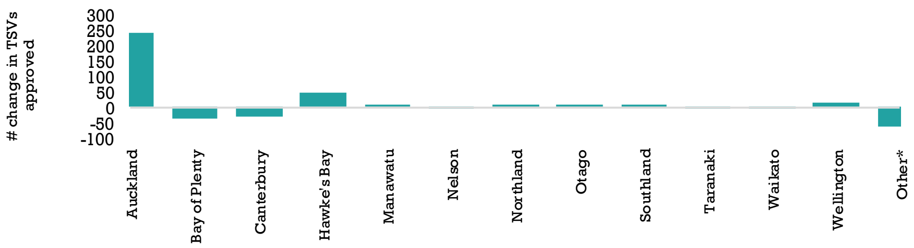
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
48 ↑ 83%	88 ↑ 48%	136 ↑ 56%	80 ↑ 13%	88 ⇨ 4%	168 ↑ 5%

YTD (September)

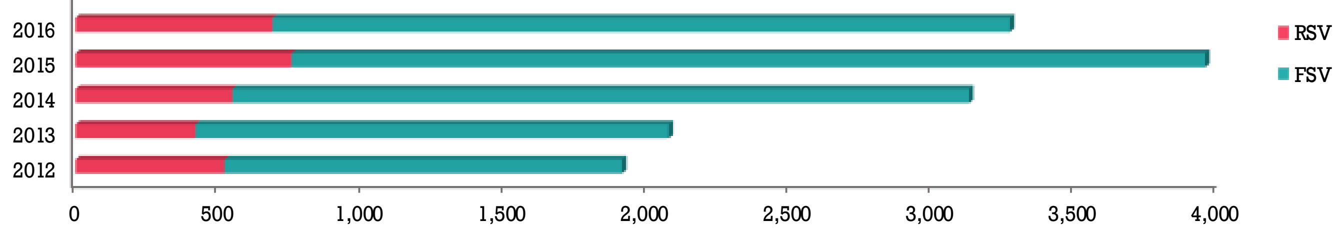
Latin America: student visas approved 2014-2016



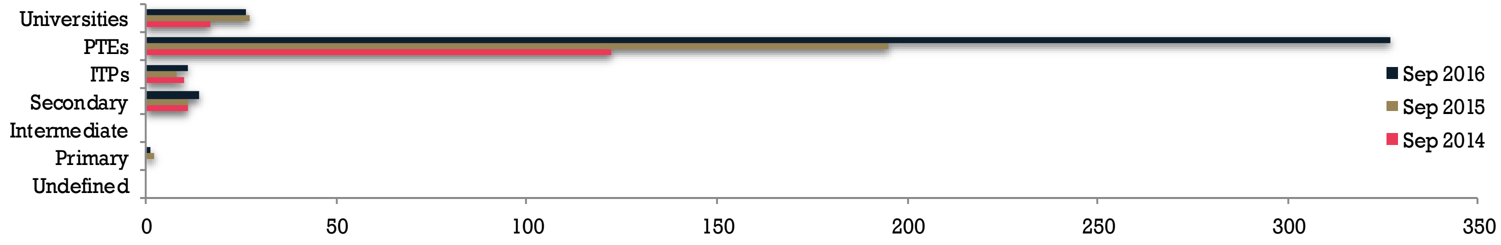
Latin America: 2016 YTD TSV regional change



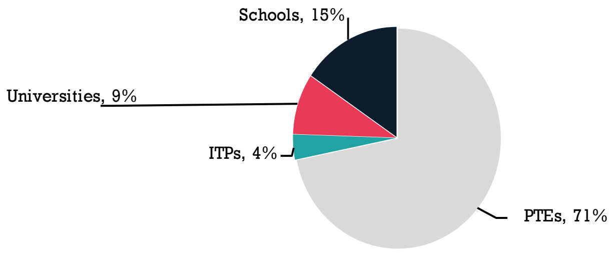
Latin America: Annual Cumulative total for RSV vs. FSV, 2012-2016



Latin America: Total student visas approved by sector, September



Latin America: 2016 YTD Sector breakdown of TSV



Key takeaways:

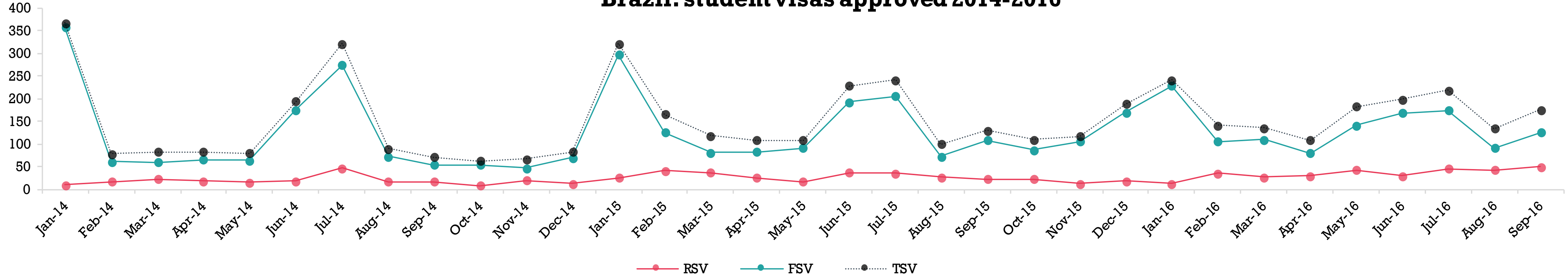
- The Latin America region has increased YTD (+5%, 168). September 2016 saw a positive result with TSV up 56% (+136), this was largely attributed to the increase in FSV up 48% (88) compared to September 2015.
- The PTE sector accounts for the majority of TSV approved YTD (71%), followed by the schools sector with 15%.

Brazil:

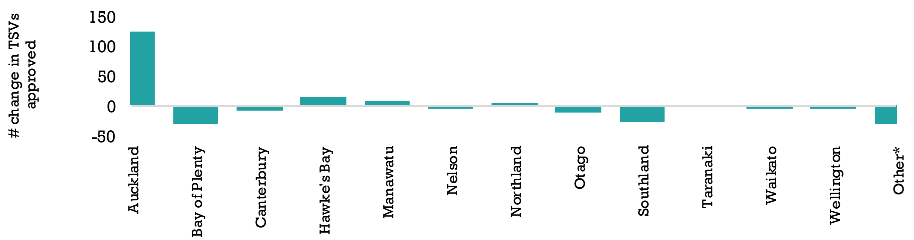
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
28 ⇧127%	18 ⇧17%	46 ⇧35%	49 ⇧18%	-32 ⇨ -3%	17 ⇨ 1%

YTD (September)

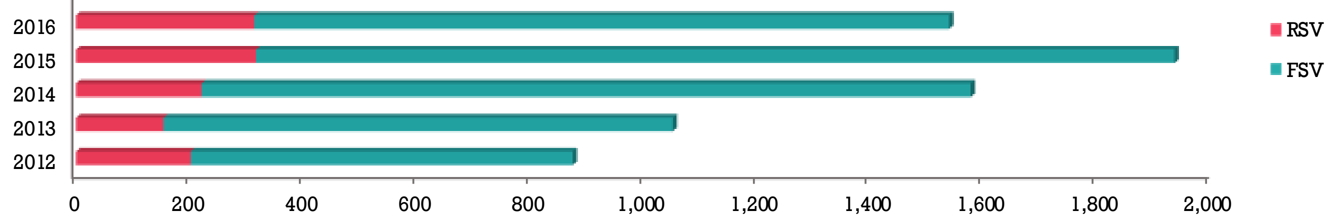
Brazil: student visas approved 2014-2016



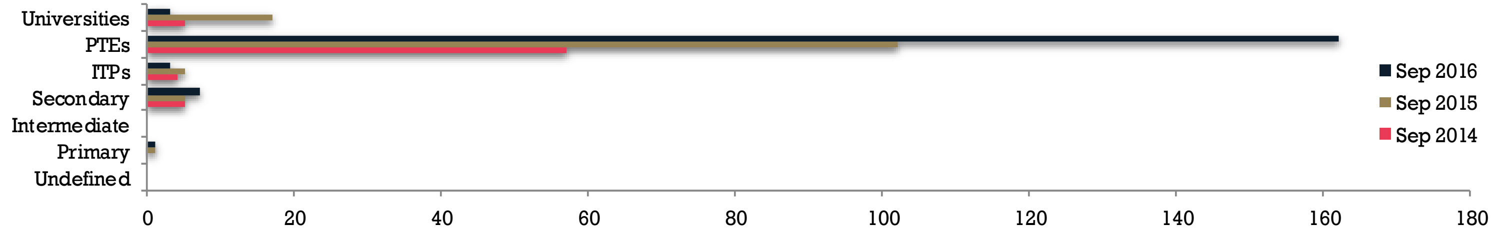
Brazil: 2016 YTD TSV regional change



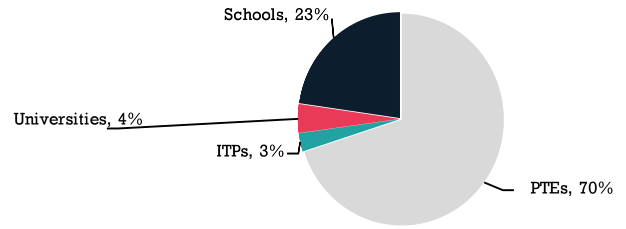
Brazil: Annual Cumulative total for RSV vs. FSV, 2012-2016



Brazil: Total student visas approved by sector, September



Brazil: 2016 YTD Sector breakdown of TSV



Key takeaways :

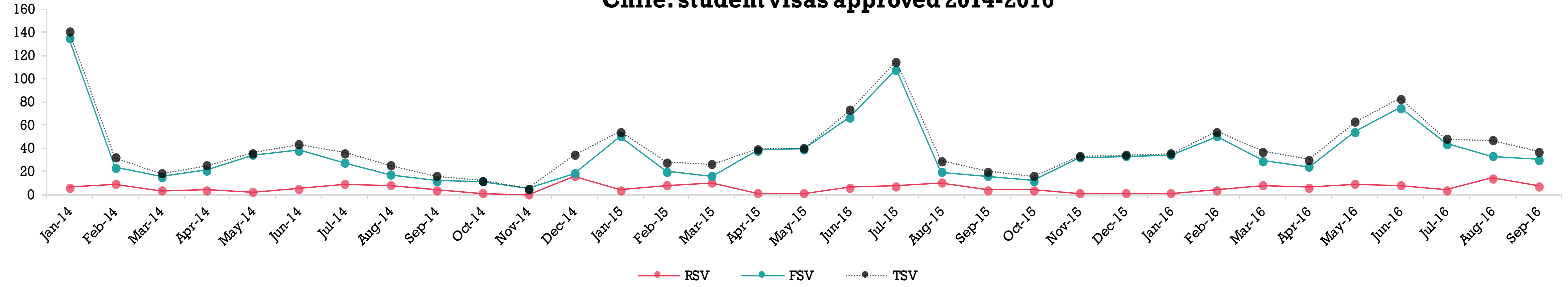
- Brazil are in decline YTD with TSV -1%, being driven by a decline in FSV -3% (-32). September 2016 results were positive with both FSV and RSV up 17% and 127% respectively.
- The Brazilian government-funded scholarship scheme 'Science Without Borders' (SWB) was put on hold in early 2015 and, at a recent education fair, ENZ representatives found that most students had been planning to study through SWB, and were now researching alternative ways to come to New Zealand to study. It may take another 12 months to fully understand the impact of this scholarship programme being on hold.
- The PTE and secondary schools sectors saw growth in TSV approved in September 2016 compared to September 2015.

Chile:

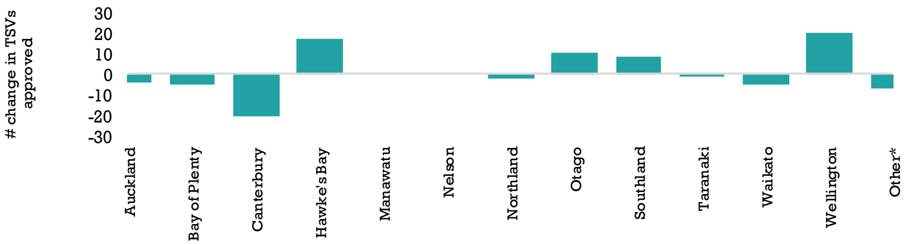
YTD (September)

September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
3 ↑ 75%	14 ↑ 88%	17 ↑ 85%	10 ↑ 20%	0 ⇨ 0%	10 ⇨ 2%

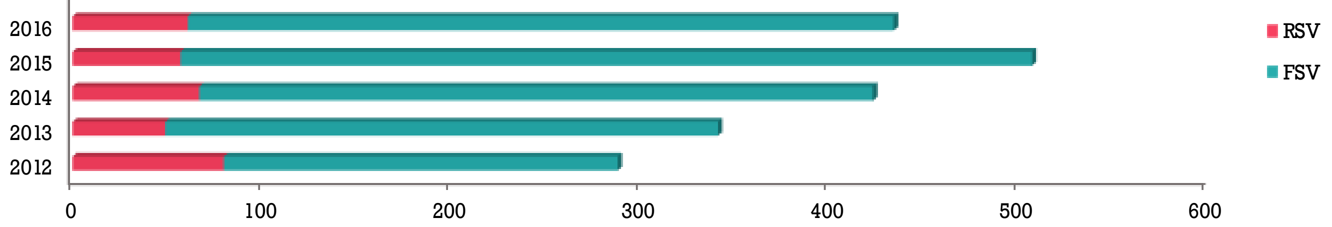
Chile: student visas approved 2014-2016



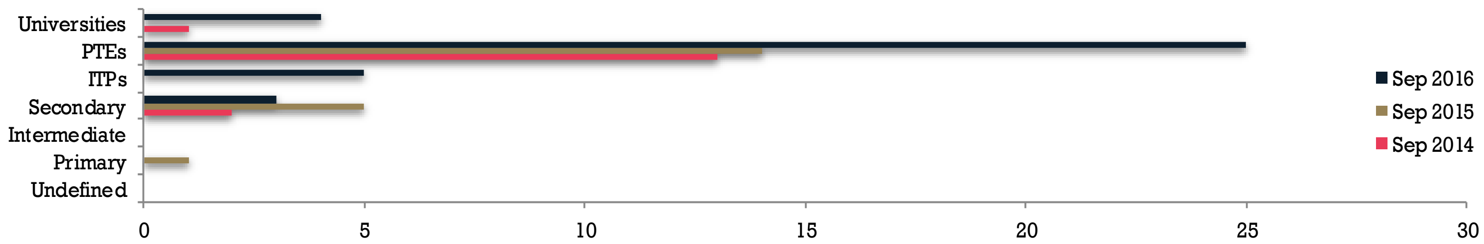
Chile: 2016 YTD TSV regional change



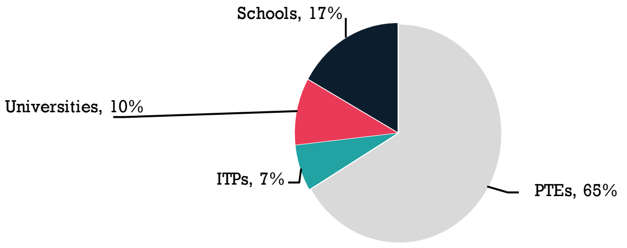
Chile: Annual Cumulative total for RSV vs. FSV, 2012-2016



Chile: Total student visas approved by sector, September



Chile: 2016 YTD Sector breakdown of TSV



Key takeaways:

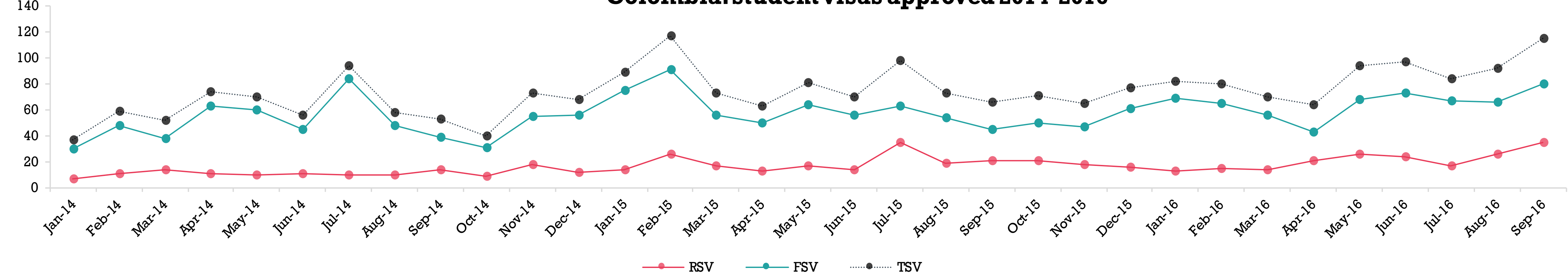
- YTD TSV from Chile are up 2% (+10) which is being driven by a 20% increase in RSV (+10).
- Hawke's Bay, Otago and Wellington are regions that have seen growth YTD.
- 65% of Chilean students are choosing to study at PTEs so far this year followed by the schools sector with 17%.

Colombia:

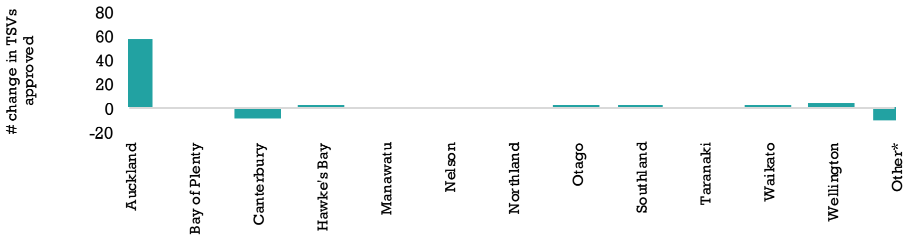
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
14 ⇧ 67%	35 ⇧ 78%	49 ⇧ 74%	15 ⇧ 9%	33 ⇧ 6%	48 ⇧ 7%

YTD (September)

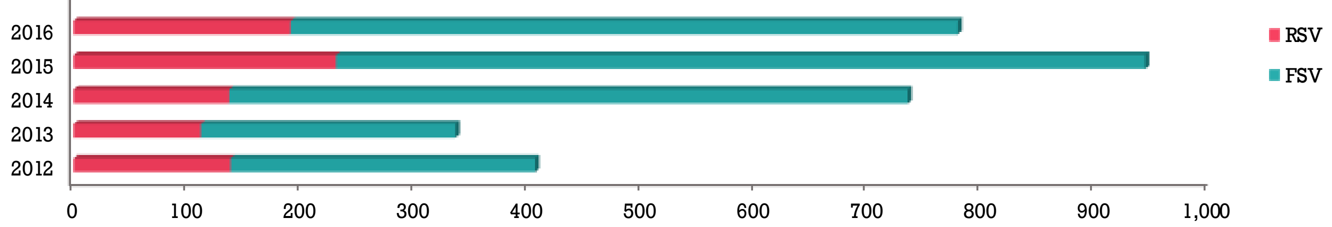
Colombia: student visas approved 2014-2016



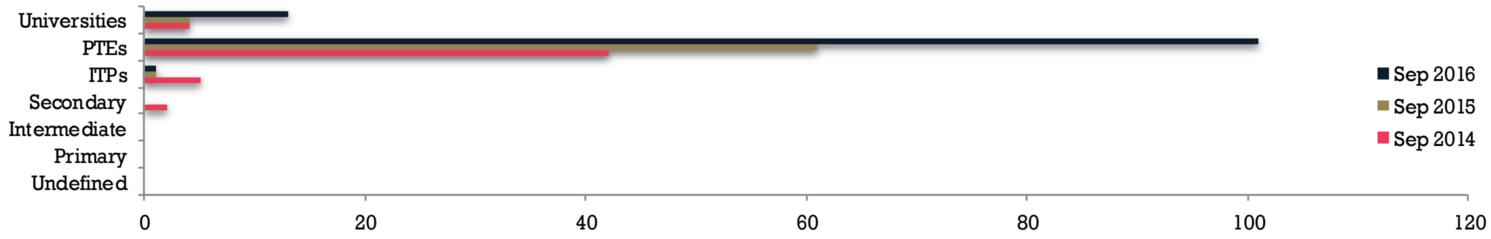
Colombia: 2016 YTD TSV regional change



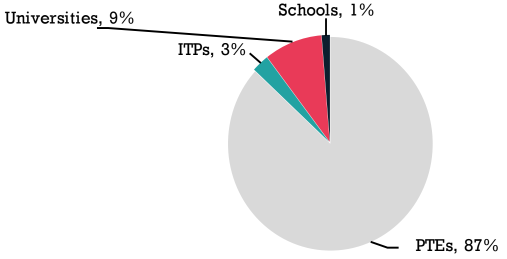
Colombia: Annual Cumulative total for RSV vs. FSV, 2012-2016



Colombia: Total student visas approved by sector, September



Colombia: 2016 YTD Sector breakdown of TSV



Key takeaways:

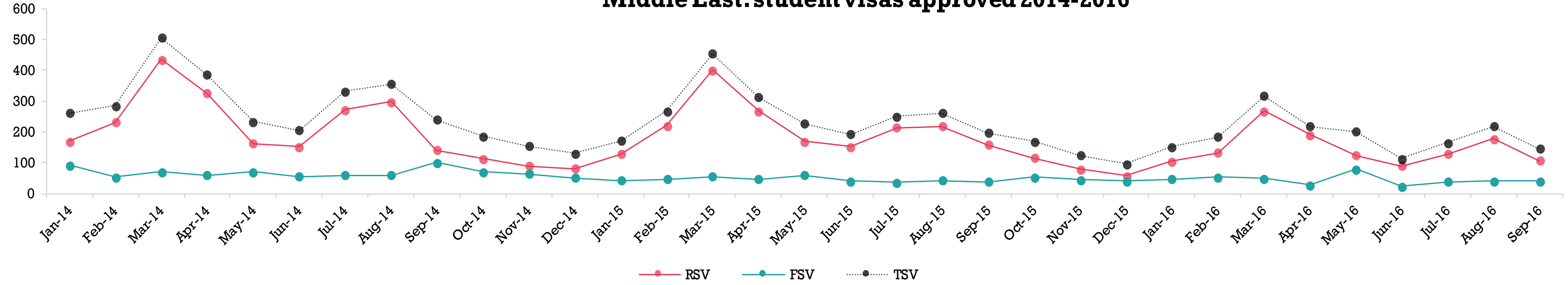
- Results for Colombia have increased YTD, with 48 more student visas approved than September YTD 2015.
- September 2016 saw a positive result with TSV up 67% and FSV up 78% compared to September 2015. The majority of TSV approved YTD have been in the PTE sector (87%).

Middle East:

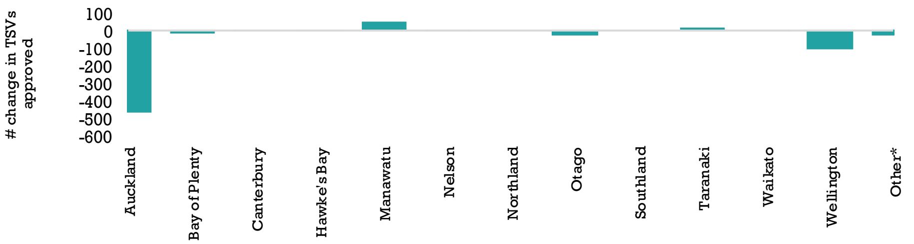
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
-53 -33%	2 5%	-51 -26%	-612 -32%	-8 -2%	-620 -27%

YTD (September)

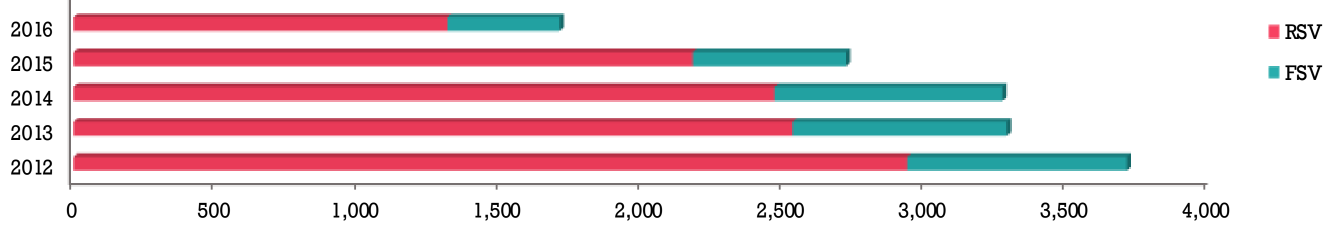
Middle East: student visas approved 2014-2016



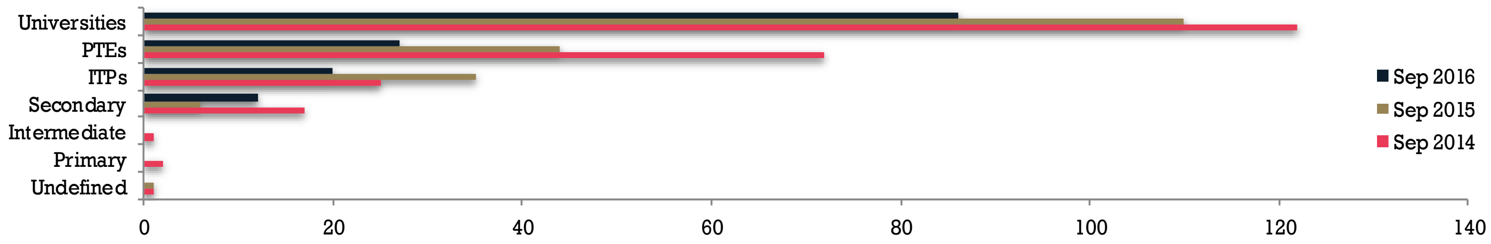
Middle East: 2016 YTD TSV regional change



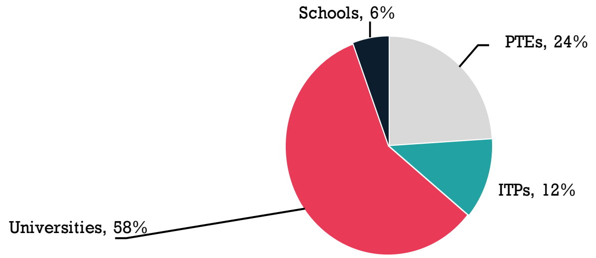
Middle East: Annual Cumulative total for RSV vs. FSV, 2012-2016



Middle East: Total student visas approved by sector, September



Middle East: 2016 YTD Sector breakdown of TSV



Key takeaways:

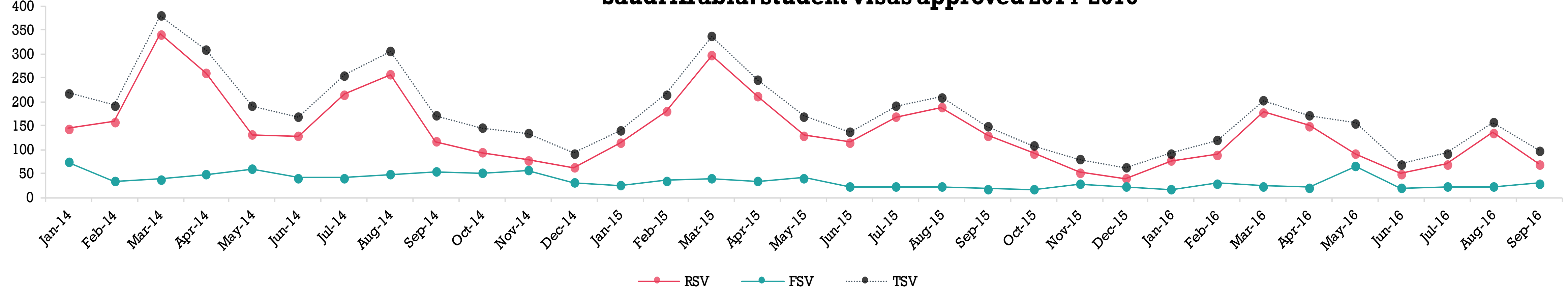
- YTD negative results seen in the Middle East is being driven by the decline in scholarship students from Saudi Arabia.
- September 2016 results were negative with RSV down 33% (-53), offset by a slight increase in FSV (5%, +8) compared to September 2015.
- The university sector accounts for 58% of TSV approved followed by the PTE sector with 24%.

Saudi Arabia:

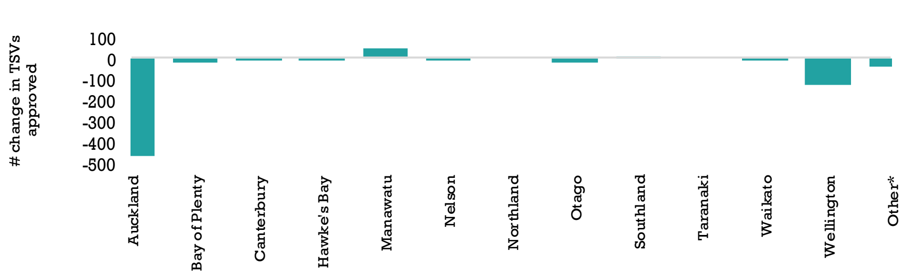
YTD (September)

September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
-61 ⇩ -47%	11 ⇧ 61%	-50 ⇩ -34%	-623 ⇩ -41%	-11 ⇩ -4%	-634 ⇩ -35%

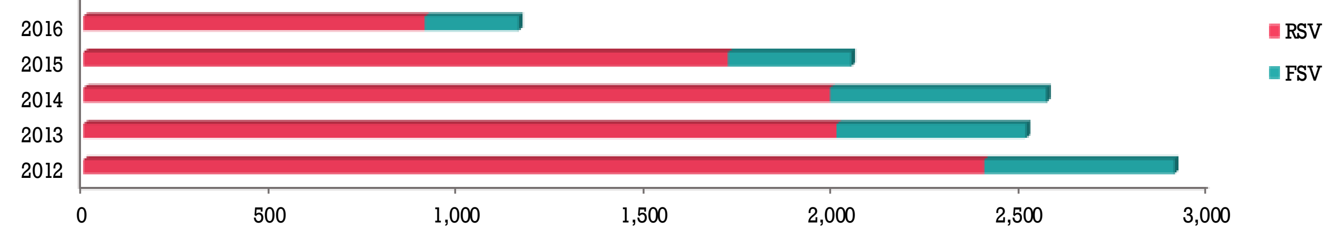
Saudi Arabia: student visas approved 2014-2016



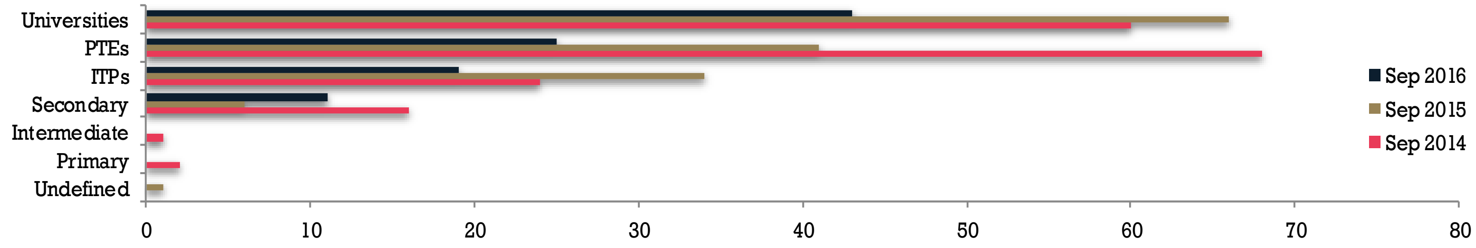
Saudi Arabia: 2016 YTD TSV regional change



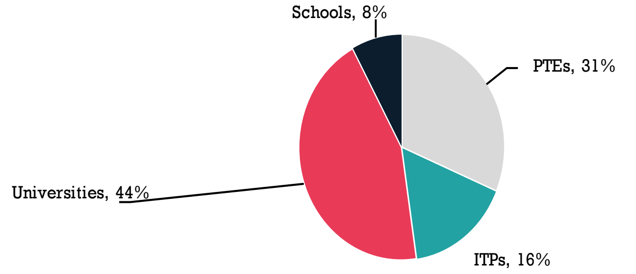
Saudi Arabia: Annual Cumulative total for RSV vs. FSV, 2012-2016



Saudi Arabia: Total student visas approved by sector, September



Saudi Arabia: 2016 YTD Sector breakdown of TSV



Key takeaways:

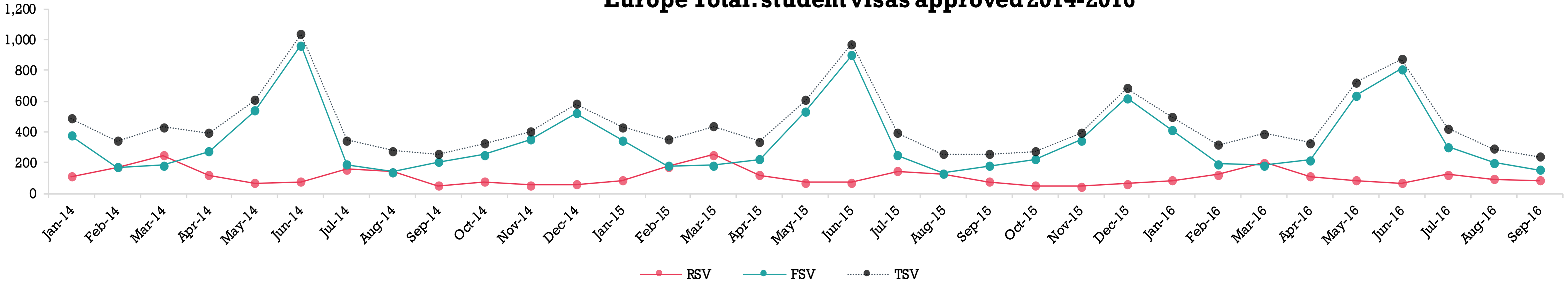
- Saudi Arabia continues to see negative results, with TSV YTD down (-35%, -634). This is being driven by both a decline in FSV and RSV and is due to reductions in the Saudi scholarship programme in recent years.
- For September in particular, there was a -34% decrease in TSV compared to the same month last year (-50) which was purely due to a decrease in RSV (-47%, -61).

Europe Total:

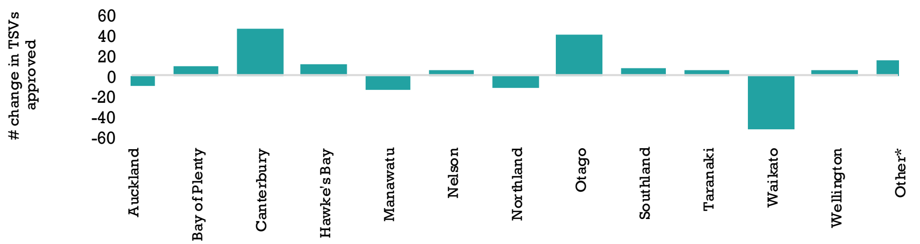
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
8 10%	-22 -12%	-14 -6%	-146 -13%	191 7%	45 1%

YTD (September)

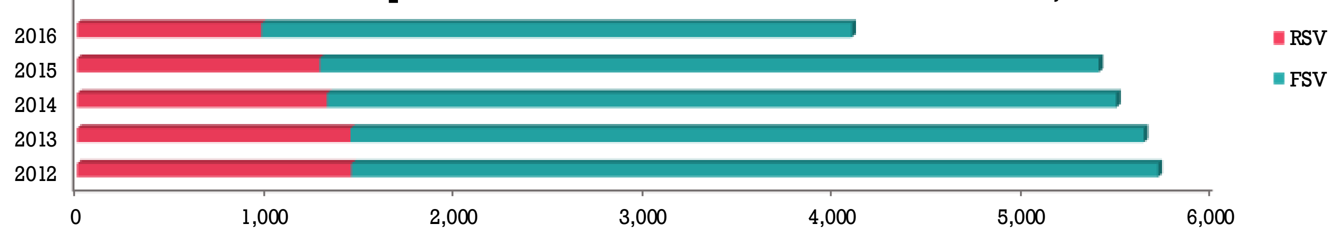
Europe Total: student visas approved 2014-2016



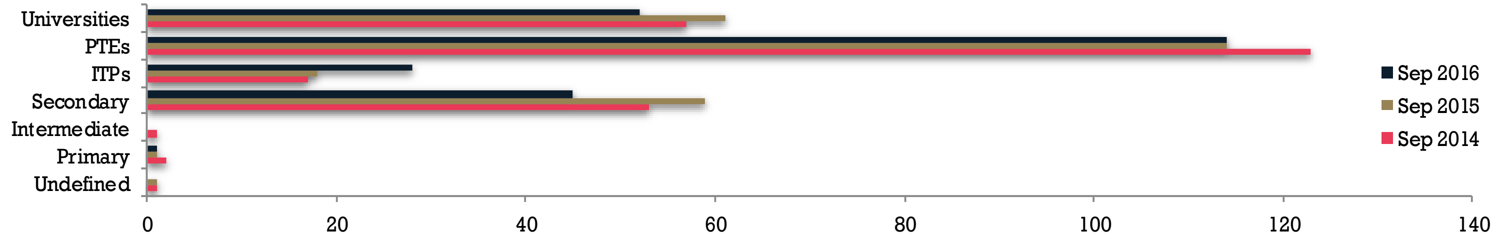
Europe Total: 2016 YTD TSV regional change



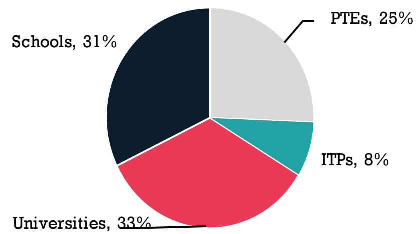
Europe Total: Annual Cumulative total for RSV vs. FSV, 2012-2016



Europe Total: Total student visas approved by sector, September



Europe Total: 2016 YTD Sector breakdown of TSV



Key takeaways:

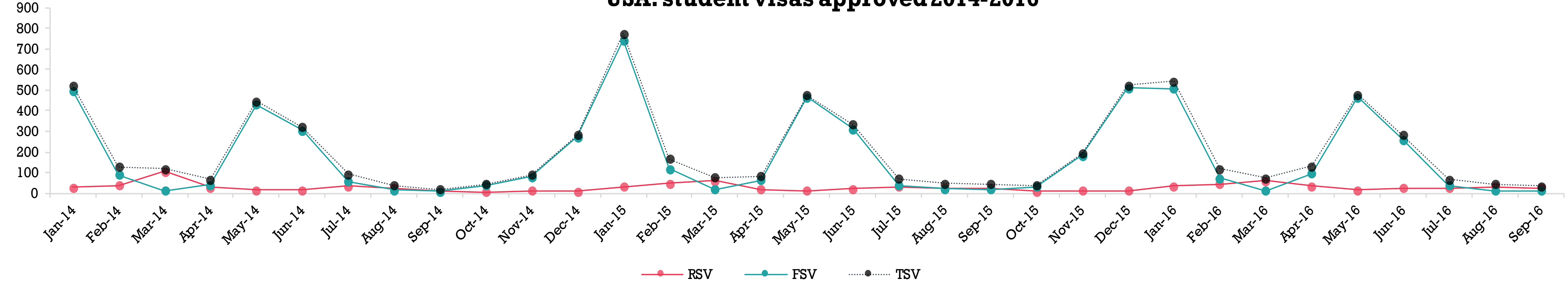
- Europe is flat YTD, up 1% (+45). FSV have increased by 7% (+191) However, this is being offset by a decline in RSV, down 13% (-146) compared to the same period last year.
- Europe a decline September 2016, with TSV down 6% (-14) being driven by FSV declining by 12% (-22) compared to September 2015.
- The university, PTE and school sectors attract the majority of European students (92%).

USA:

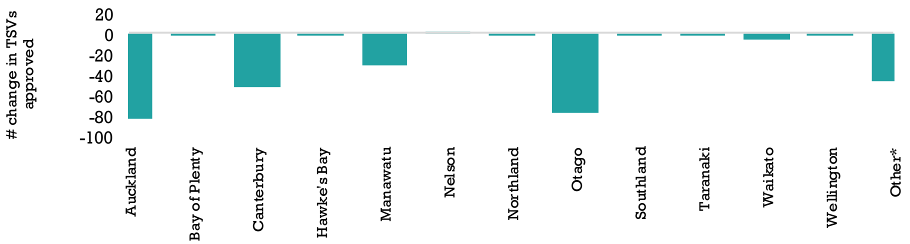
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
-3 ⇩ -12%	-6 ⇩ -35%	-9 ⇩ -21%	17 ⇧ 6%	-322 ⇩ -18%	-305 ⇩ -15%

YTD (September)

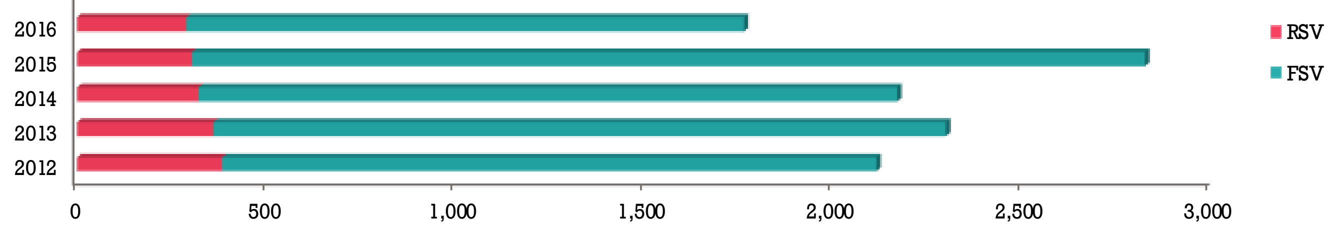
USA: student visas approved 2014-2016



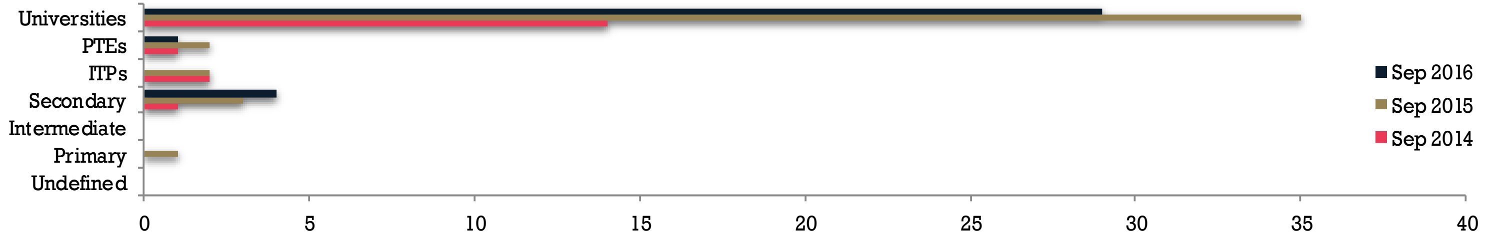
USA: 2016 YTD TSV regional change



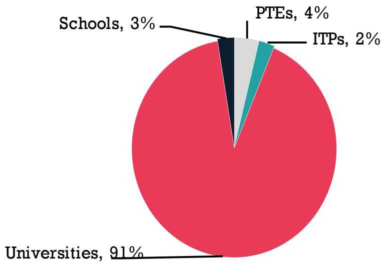
USA: Annual Cumulative total for RSV vs. FSV, 2012-2016



USA: Total student visas approved by sector, September



USA: 2016 YTD Sector breakdown of TSV



Key takeaways:

- While USA TSV appear to be much lower than normal YTD (-15%, -305), this is not reflective of the market. There was an 82% increase in the last quarter of 2015, where visas typically approved in the first quarter of 2016 were approved earlier.
- September 2016 results showed a decrease with RSV down 12% (-3) and FSV decreasing (-35%, -6).
- The secondary school sector saw an increase in TSVs approved in September 2016.
- There has been a 15% decline in total student visas issued to the USA. This is likely a result of processing delays rather than a decrease in demand and is expected to right itself in coming months.

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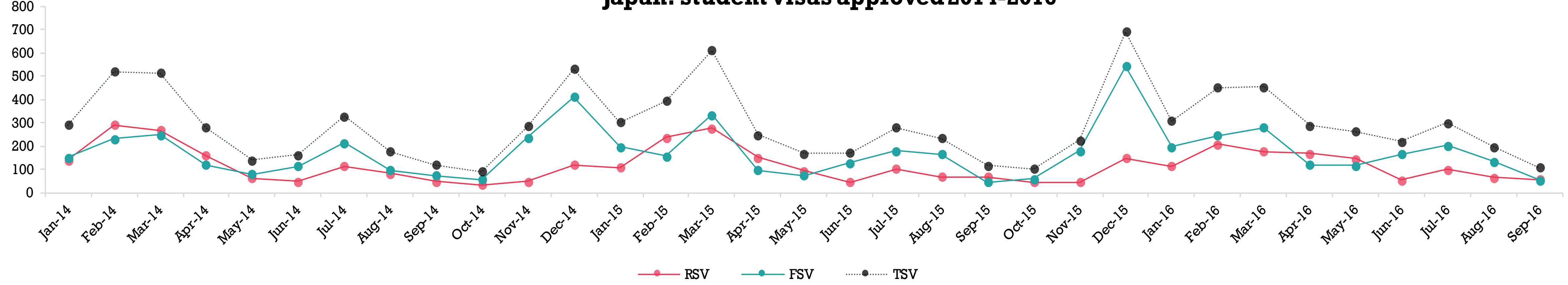
Japan:

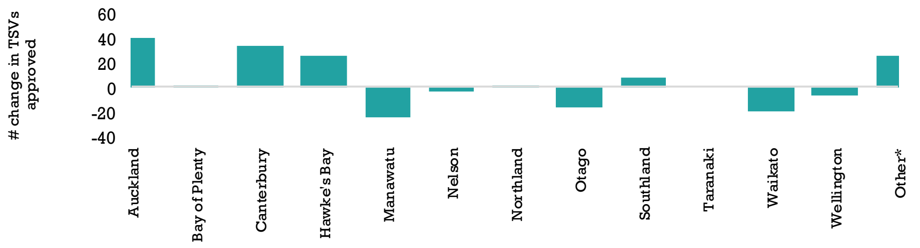
September RSV	September FSV	September TSV		YTD RSV	YTD FSV	YTD TSV
-14 ⇩ -20%	6 ⇧ 13%	-8 ⇩ -7%		-67 ⇩ -6%	133 ⇧ 10%	66 ⇨ 3%

YTD (September)

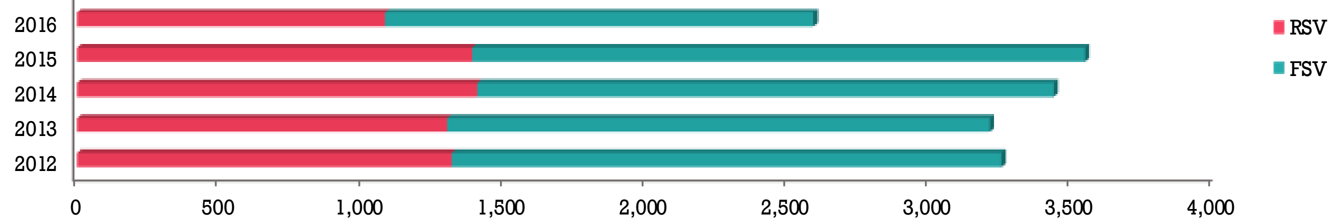
Japan: student visas approved 2014-2016



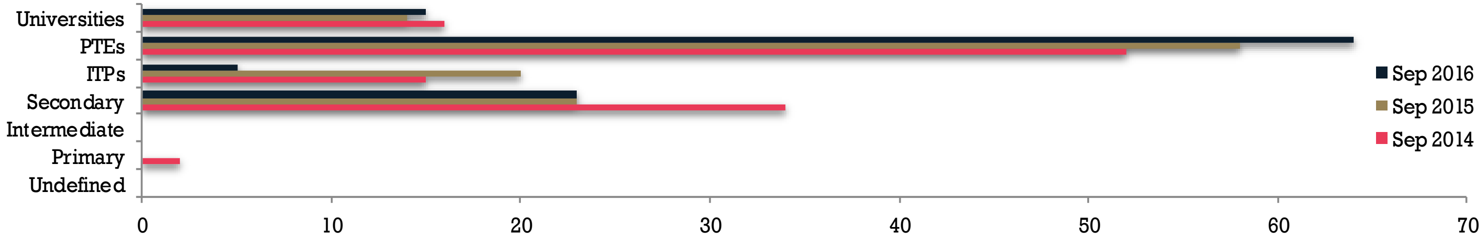
Japan: 2016 YTD TSV regional change



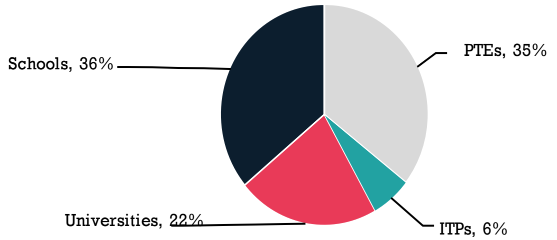
Japan: Annual Cumulative total for RSV vs. FSV, 2012-2016



Japan: Total student visas approved by sector, September



Japan: 2016 YTD Sector breakdown of TSV



Key takeaways:

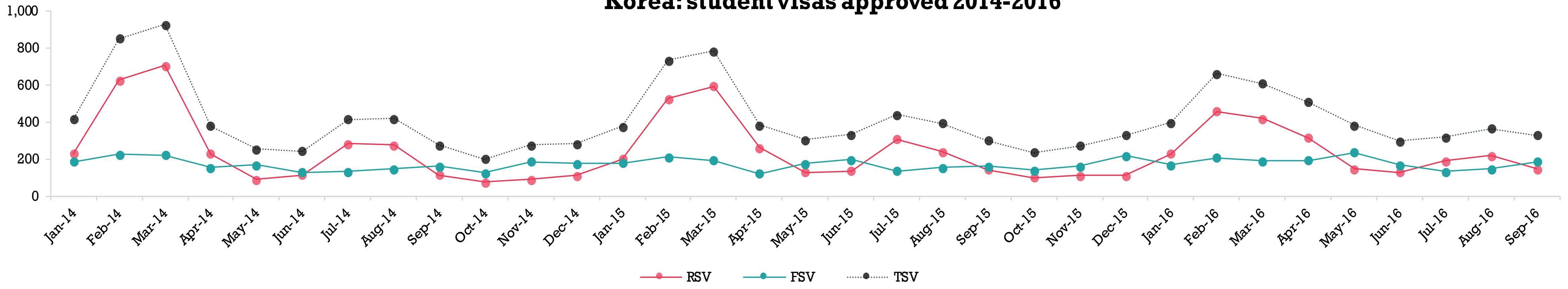
- Japan has seen an increase in FSV approved YTD (+10%, +133), however, the number of students choosing to remain/return to New Zealand to study has declined compared to 2015 YTD (-6%, -67). September saw mixed results with FSV down 13% (-6).
- The schools and PTE sectors draw 71% of Japanese students to New Zealand.

Korea:

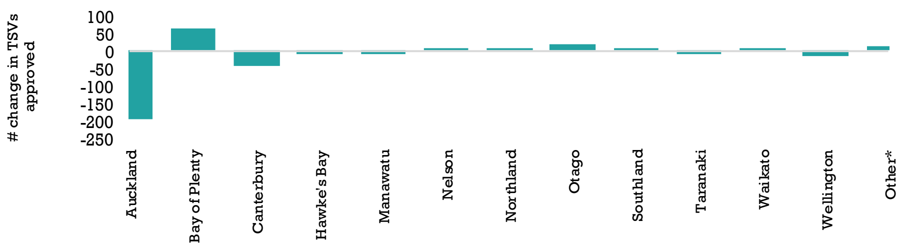
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
4 ⇨ 3%	24 ⇧ 15%	28 ⇧ 9%	-283 ⇩ -11%	105 ⇧ 7%	-178 ⇩ -4%

YTD (September)

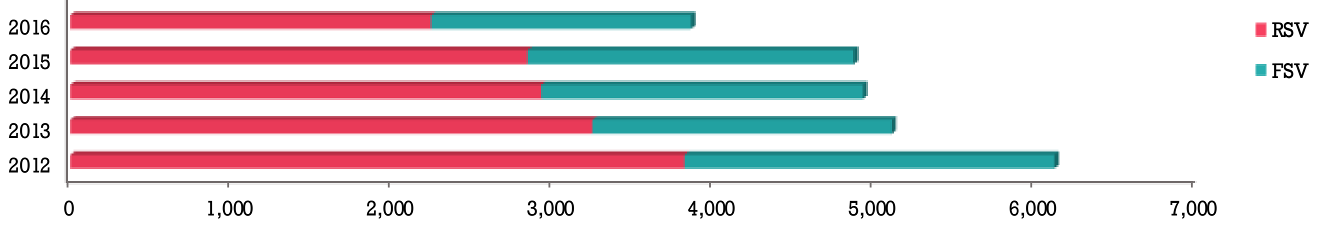
Korea: student visas approved 2014-2016



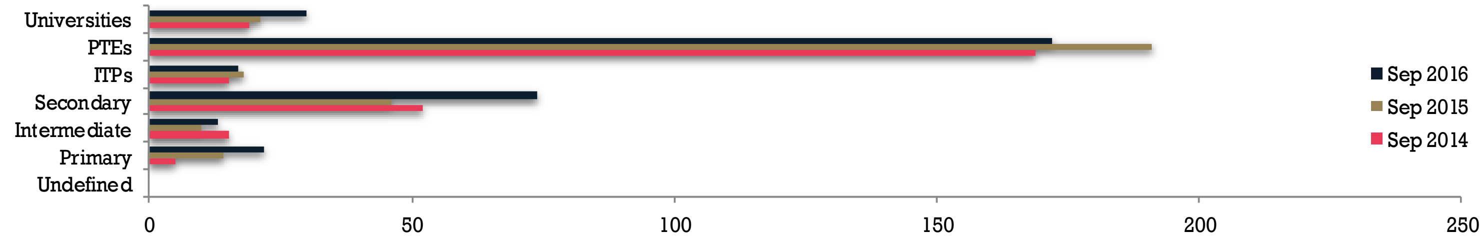
Korea: 2016 YTD TSV regional change



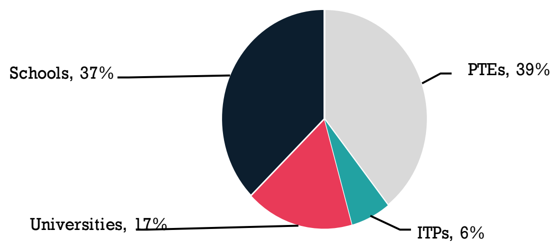
Korea: Annual Cumulative total for RSV vs. FSV, 2012-2016



Korea: Total student visas approved by sector, September



Korea: 2016 YTD Sector breakdown of TSV



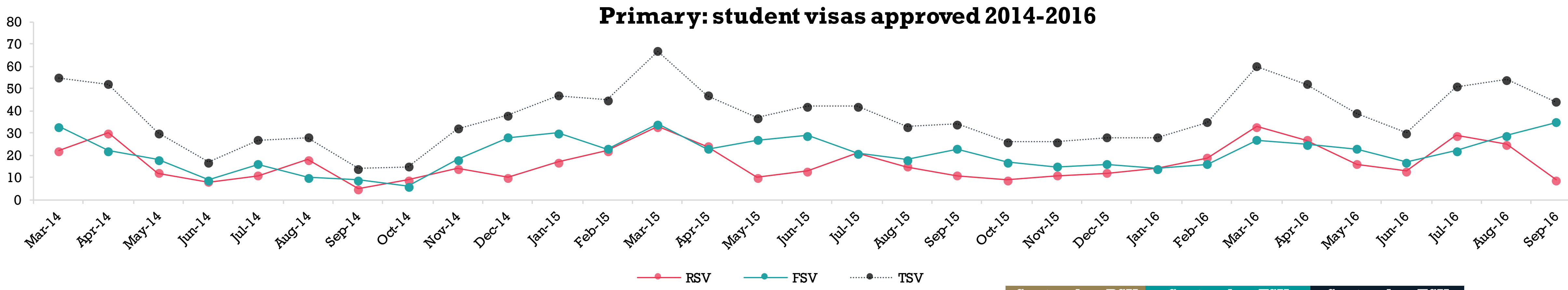
Key takeaways:

- It has been suggested that Korean students are less encouraged to study abroad in English-speaking countries due to changing (and uncertain) domestic university entrance policies.
- While TSVs approved for Korea are in decline YTD (-4%, -178), FSV are up 7% (+105). September TSV increased (9%, +28) driven by an increase in RSV up 15% (+24).
- Universities, and all school sectors saw an increase in visas issued for September 2016 compared to September 2015, but there was a drop visas issued for PTEs.

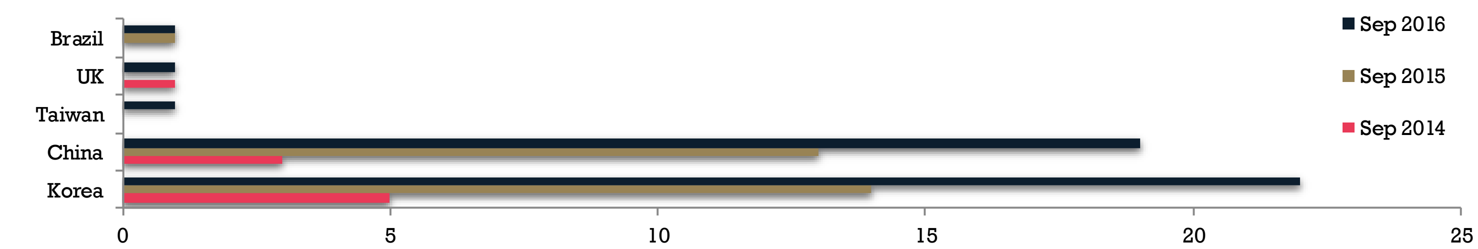
Trends by sector

Primary schools:

YTD (September)

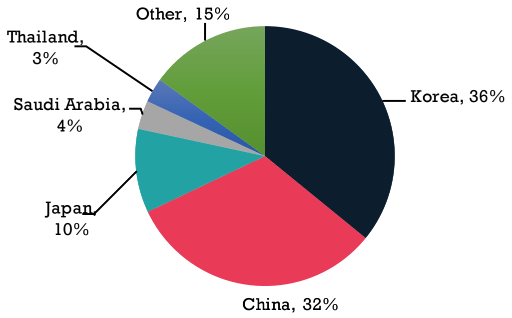


Primary: Total student visas approved by sector, September

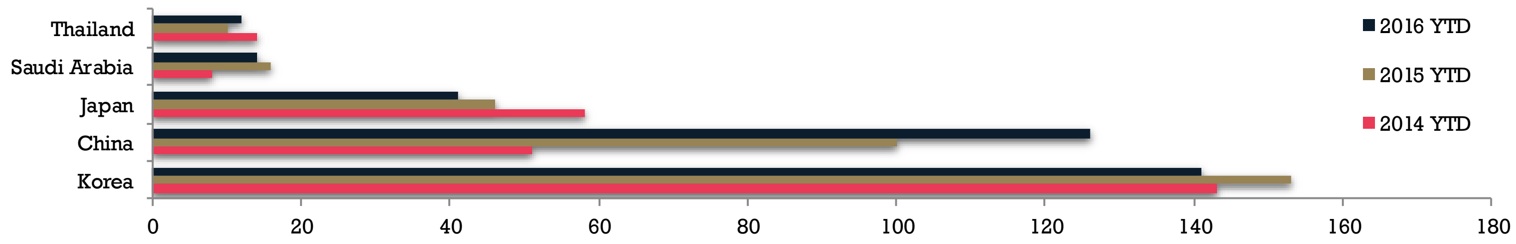


September RSV		September FSV		September TSV	
-2	-18%	12	52%	10	29%
YTD RSV		**YTD FSV**		**YTD TSV**	
19	11%	-20	-9%	-1	0%

Primary: YTD 2016 Sector breakdown of TSV



Primary: Total student visas approved by sector, YTD

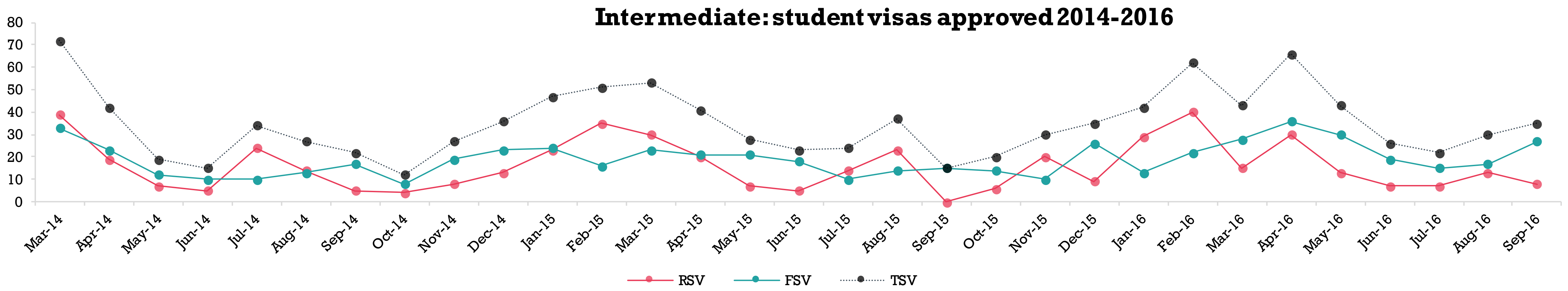


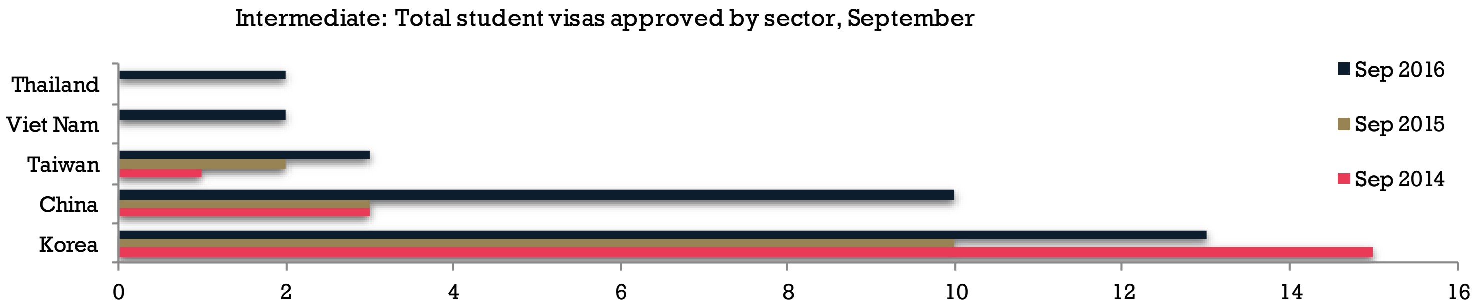
Key takeaways:

- TSV saw growth in September 2016 (+29%), however overall TSV YTD are flat (-0%,-1) in the primary school sector. The decline is being driven by FSV (-9%,-20) YTD.
- Korea, China and Japan make up 78% of all visas approved this YTD in primary schools.

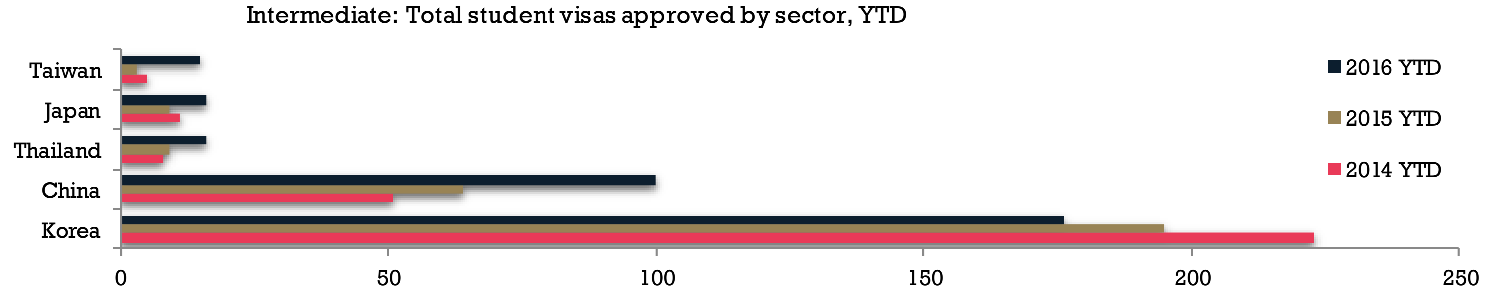
Intermediate schools:

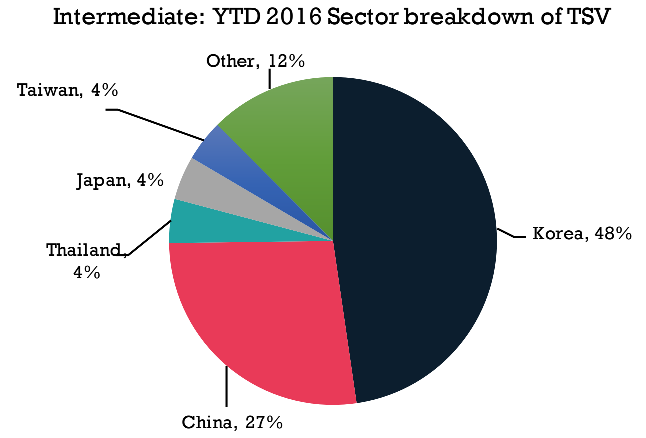
YTD (September)





September RSV		September FSV			September TSV		
8		12	⇧	80%	20	⇧	133%
YTD RSV		YTD FSV			YTD TSV		
5	⇨ 3%	45	⇧	28%	50	⇧	16%



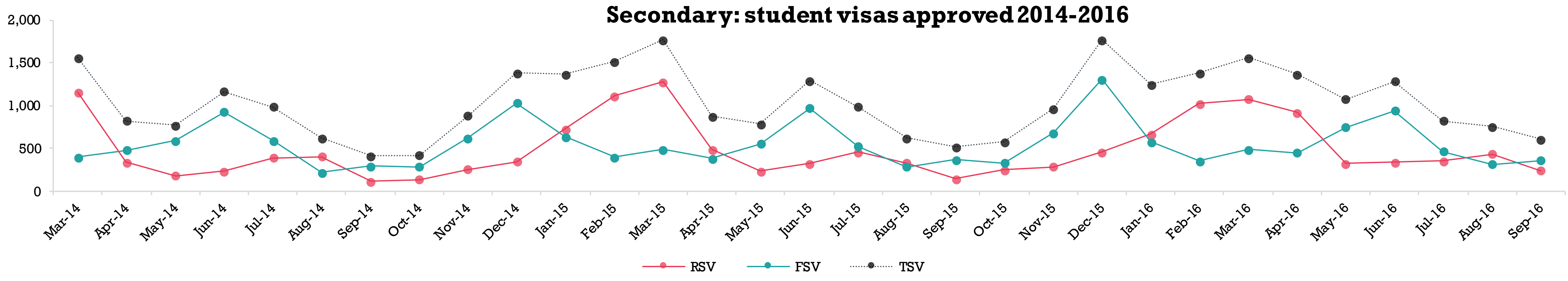


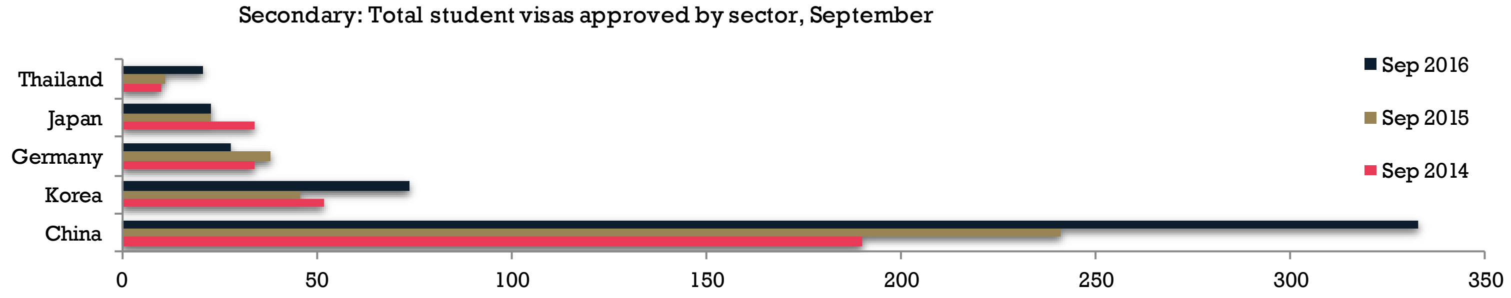
Key takeaways:

- The intermediate school sector is experiencing growth in TSV YTD (+16%, +50).
- There was a 80% increase in FSV approved in September 2016 compared to September 2015. This growth has been from Korea, China and Taiwan.

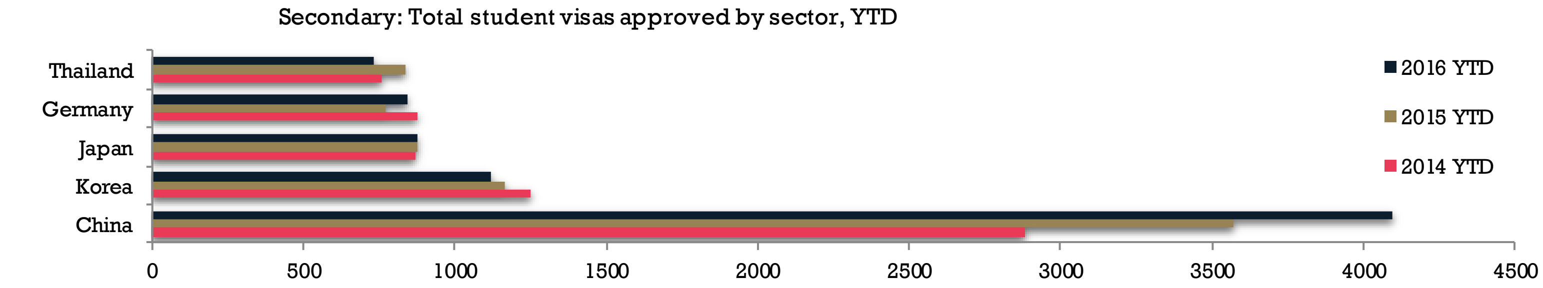
Secondary schools:

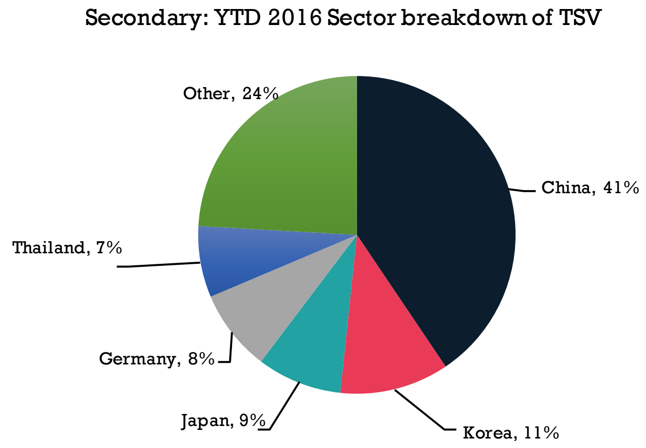
YTD (September)





September RSV		September FSV		September TSV	
99	↑ 68%	-6	⇨ -2%	93	↑ 18%
YTD RSV		**YTD FSV**		**YTD TSV**	
279	↑ 5%	88	⇨ 2%	367	⇨ 4%



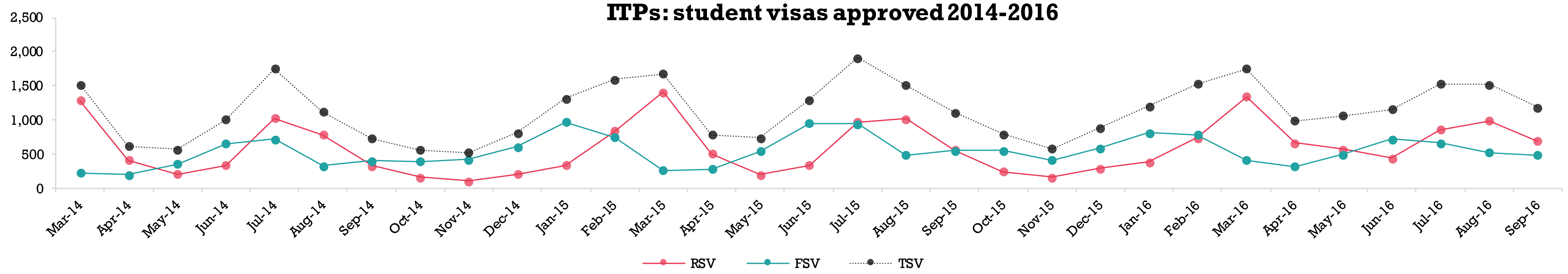


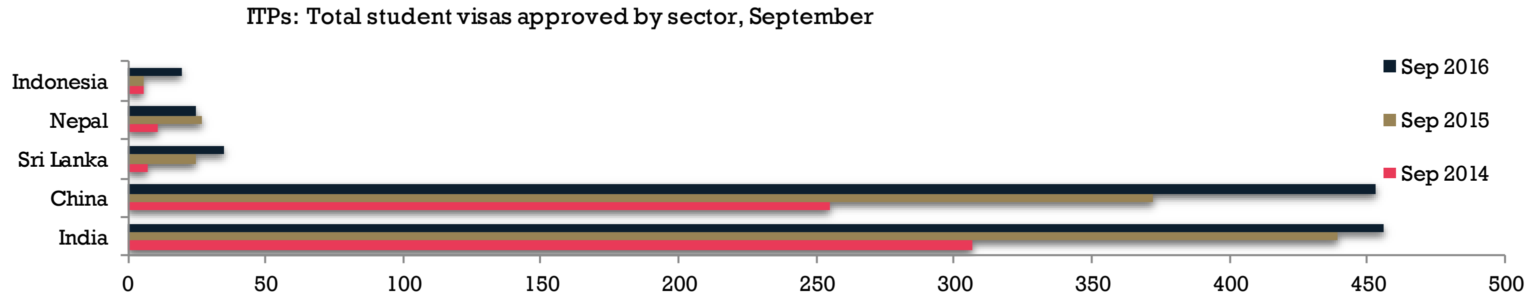
Key takeaways:

- YTD, the secondary schools market results are flat, with TSV up 4% (+367) and FSV +2% (+88) compared to 2015. September 2016 TSV were up 18% (+93) driven by a increase in RSV (68%, +99) compared on September 2015.
- Markets that saw growth YTD in September were China and Germany.
- The majority (61%) of secondary school students are from: China, Korea and Japan.

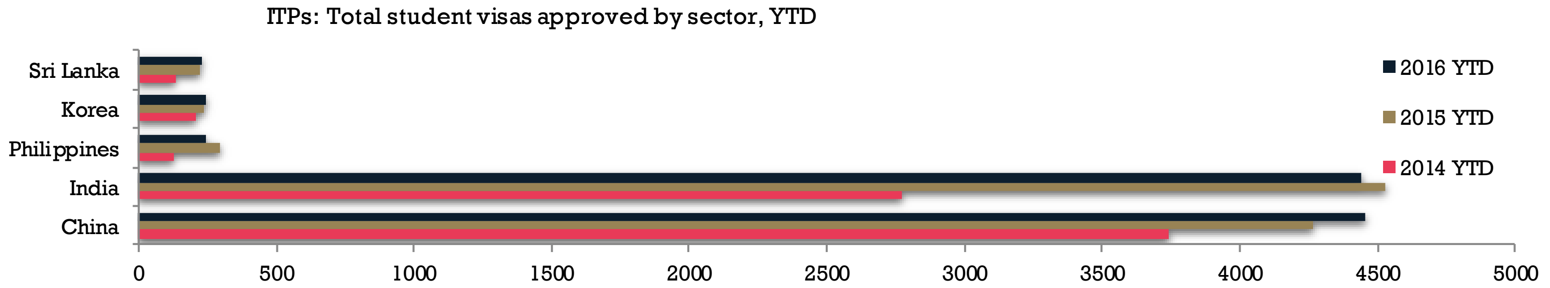
Institutes of Technology and Polytechnics (ITPs):

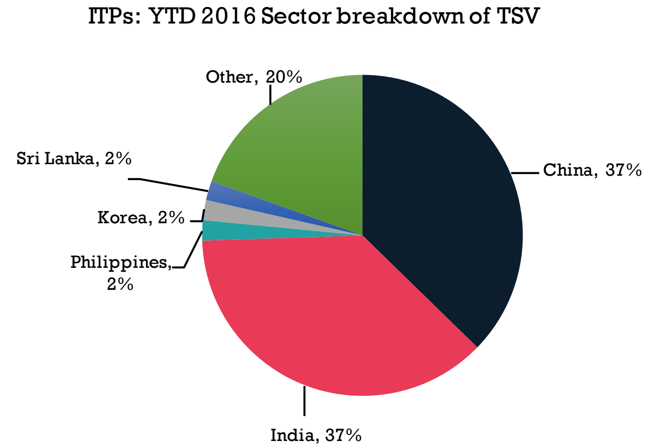
YTD (September)





September RSV			September FSV			September TSV		
138	⇧	25%	-70	⇩	-13%	68	⇧	6%
YTD RSV			**YTD FSV**			**YTD TSV**		
513	⇧	8%	-520	⇩	-9%	-7	⇨	0%



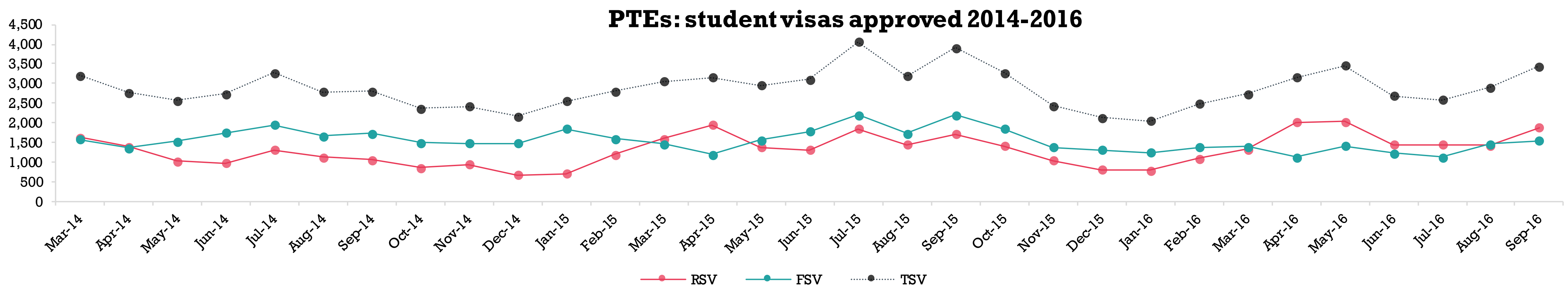


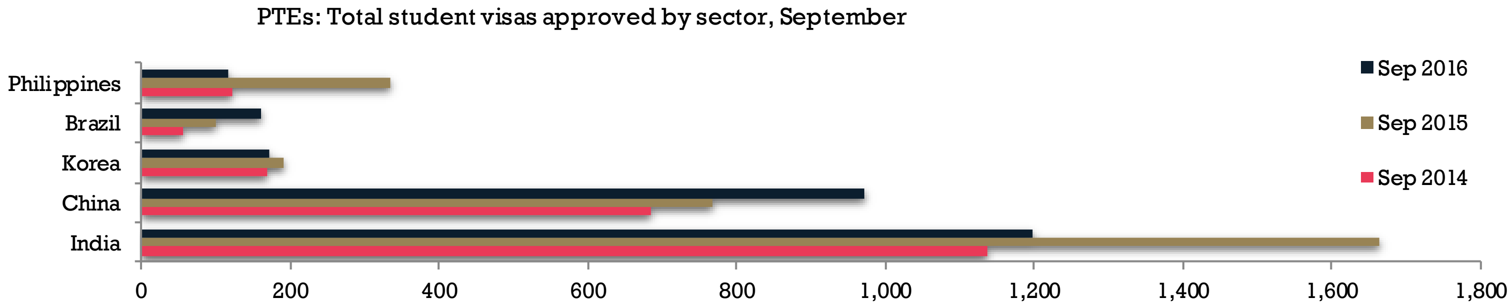
Key takeaways:

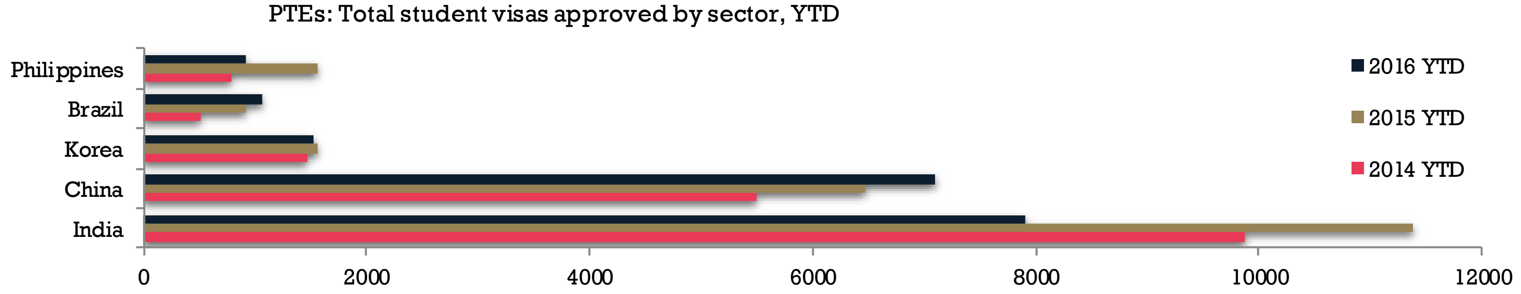
- YTD results for the ITP sector are flat, -0% (-7) however FSV are down 9% (-520) compared to 2015 YTD. While RSV have seen strong growth, up 8% YTD (+513) indicating that students are renewing/choosing to continuing their studies in New Zealand.
- The majority of students in the ITP sector are from India and China (74% YTD).
- September 2016 saw an increase in TSV up 6% (+68) which was driven by RSV up 25% (+138) compared to September 2015.

Private Training Establishments (PTEs):

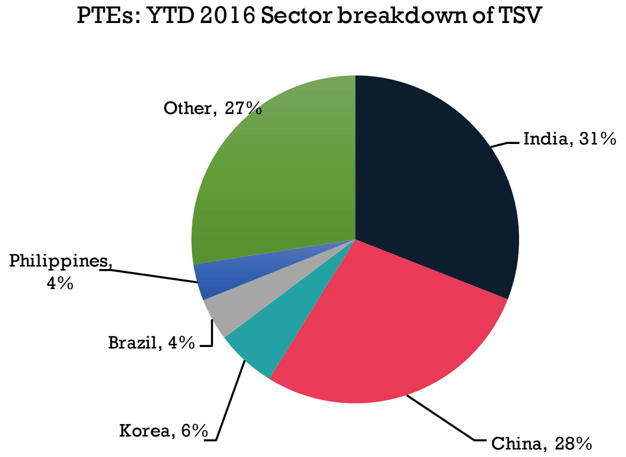
YTD (September)







September RSV		September FSV		September TSV	
174	10%	-645	-29%	-471	-12%
YTD RSV		**YTD FSV**		**YTD TSV**	
324	2%	-3,605	-23%	-3,281	-11%

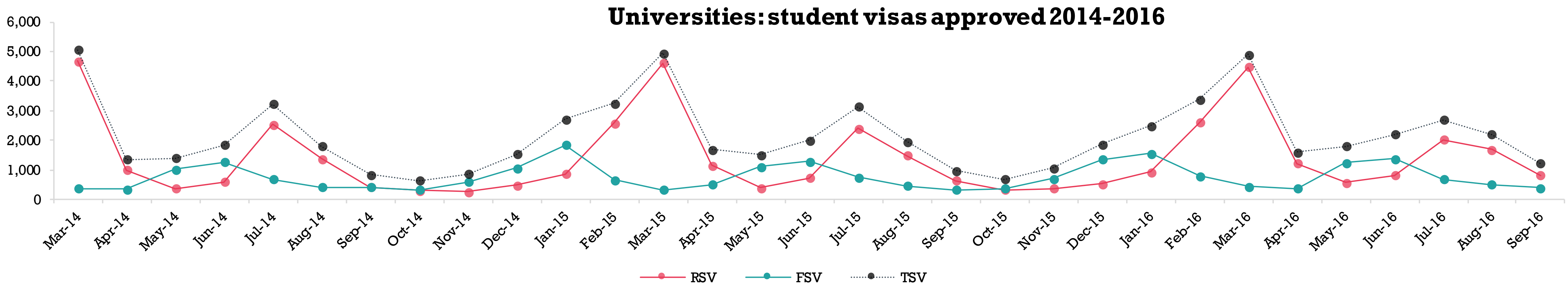


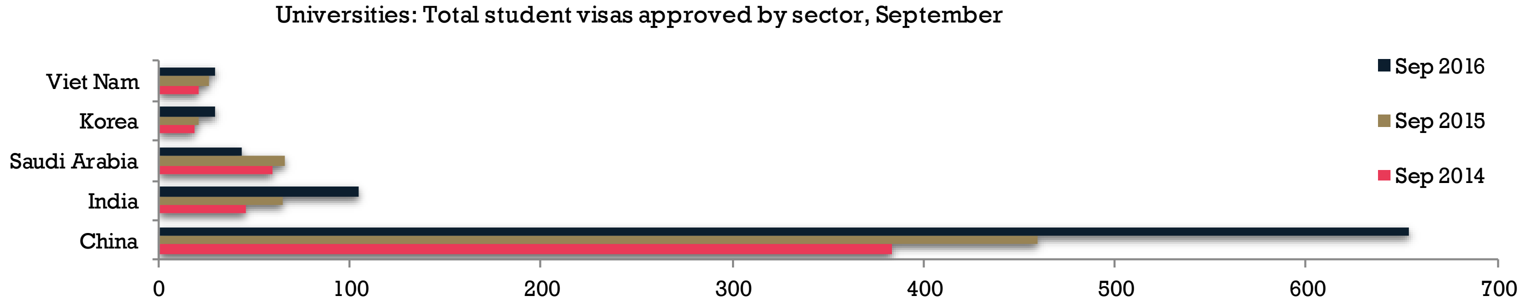
Key takeaways:

- The decline in TSV approved for the PTE sector continues YTD (-11% , -3,281) which is being driven by a reduction in student visas approved for first time students.
- The strong decrease in FSV for this sector (-23%, -3,605 YTD) is being driven by the decline in FSV approved for students from India and the Philippines following changes to the English language requirements (Rule 18) in 2015. Growth in TSV YTD have been from: China (+10%, +631), and Brazil (+18%, +160).

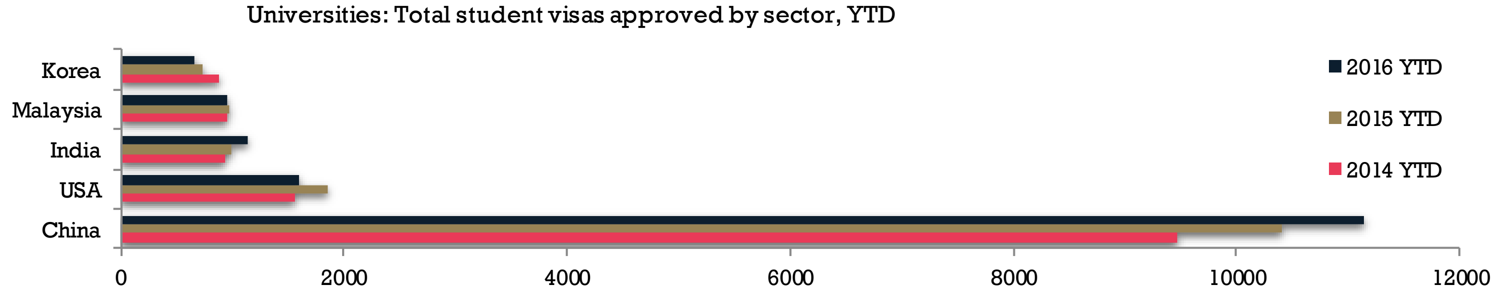
Universities:

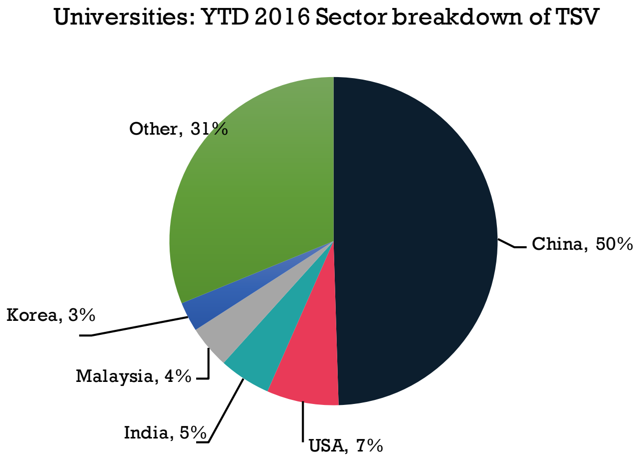
YTD (September)





September RSV		September FSV		September TSV	
182	29%	60	18%	242	25%
YTD RSV		**YTD FSV**		**YTD TSV**	
270	2%	60	1%	330	1%





Key takeaways:

- YTD results for the university sector remain stable (+1%, +330). The sector saw a increase in September 2016 (+25%, +242) being driven by RSV up 29% (+182), compared to September 2015.
- China makes up half of all TSV approved YTD for the university sector followed by the USA with just 7%.

Trends by region

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Notes about Regional Data

- Due to data improvement processes within Immigration New Zealand, there have been some changes to region-based data for visas.

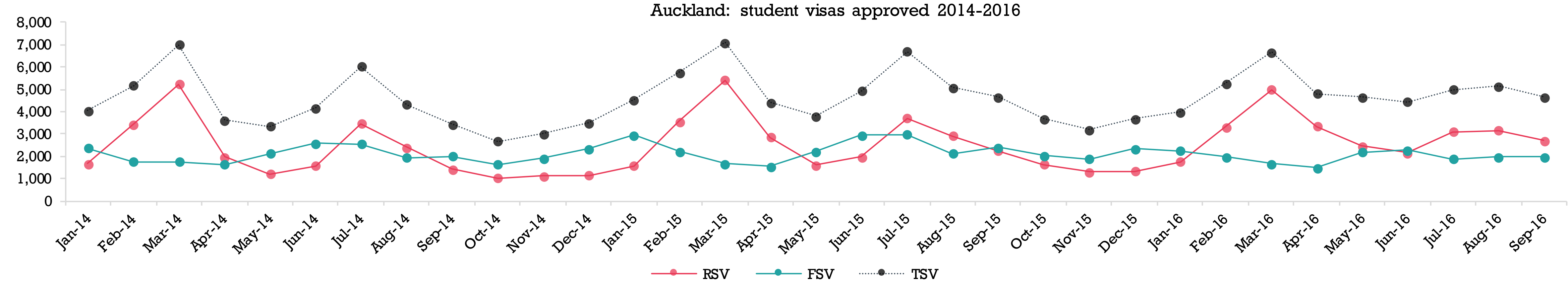
- Numbers in these slides may have changed from slides previously produced.

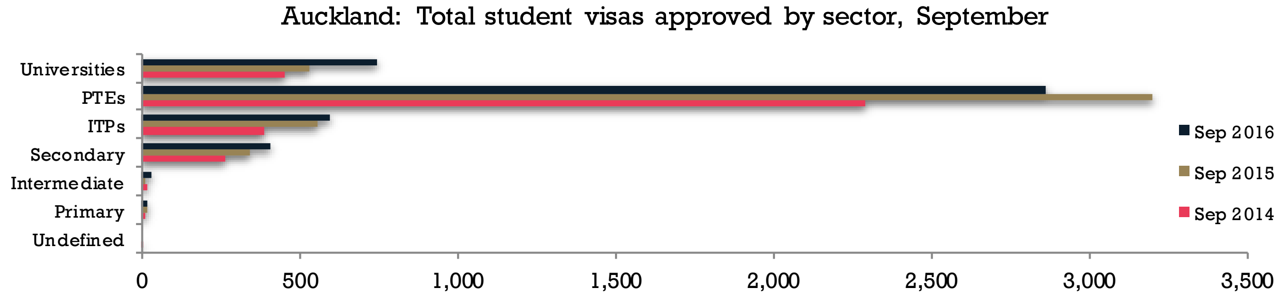
- Due to possibly quality issues, this data should be treated with caution. Numbers and percentage changes should not be considered as absolute.

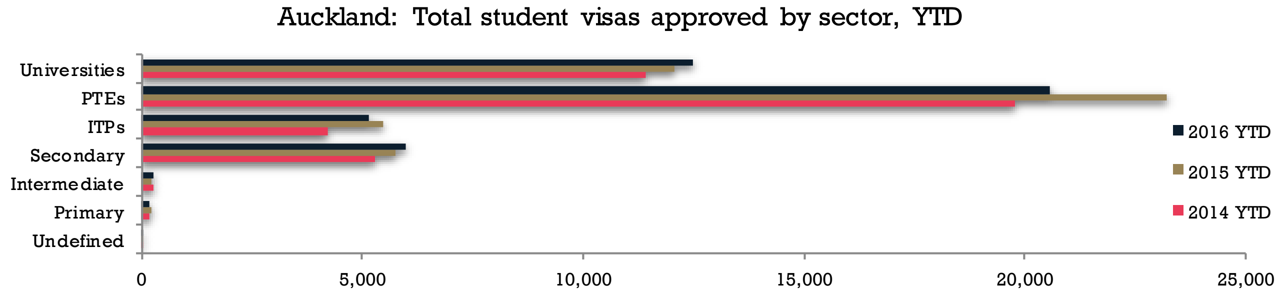
Auckland:

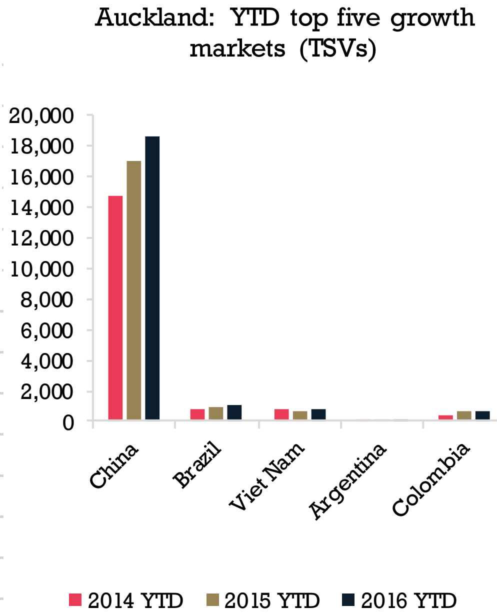
YTD (September)

September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
457 ⇧ 20%	-445 ⇩ -18%	12 ⇨ 0%	1,081 ⇧ 4%	-3,387 ⇩ -16%	-2,306 ⇩ -5%









Top FSV shifts

September FSV	Change	%change
China	133	27%
Brazil	34	49%
Colombia	33	85%
Indonesia	-22	-54%
Philippines	-184	-70%
India	-468	-49%

FSVs YTD	Change	%change
China	287	6%
Viet Nam	79	40%
Argentina	64	142%
Bangladesh	-116	-60%
Philippines	-603	-48%
India	-3445	-47%

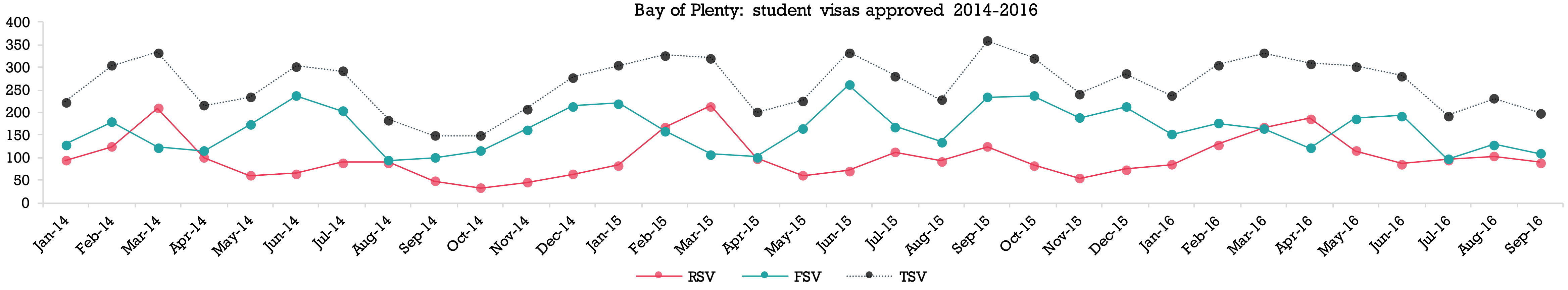
Key takeaways:

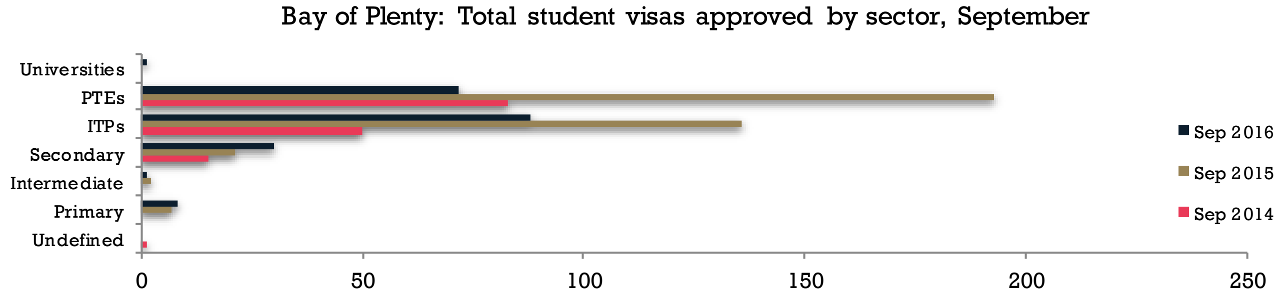
- YTD the Auckland region is in decline, down 5% (-2,306) for TSV, this is being driven by FSV, down 16% (-3,387) while RSV are increasing +4% (+1,081).
- The decline in FSV YTD is driven by a drop in approvals for Indian (-3,445) and Filipino students (-603) as a result of the change in English language requirements (Rule 18) in late 2015.
- The 11% decrease in PTE visas issued was driven by decreases in visas for India and the Philippines, but this was slightly offset by increases in visas for China, Japan and Viet Nam.

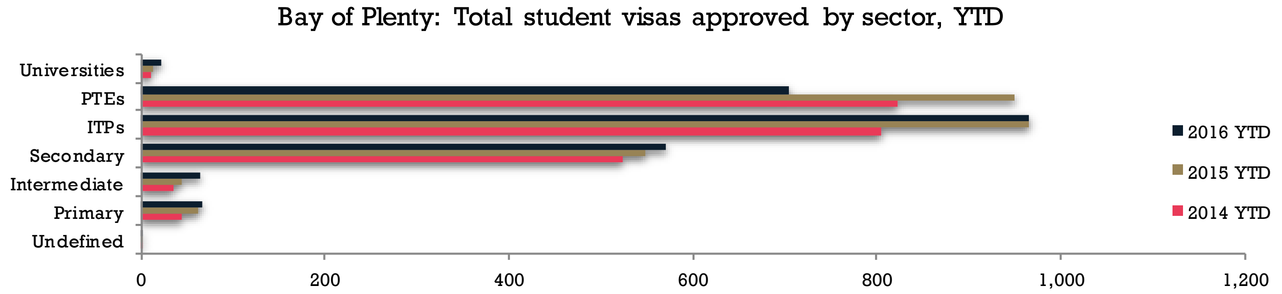
Bay of Plenty:

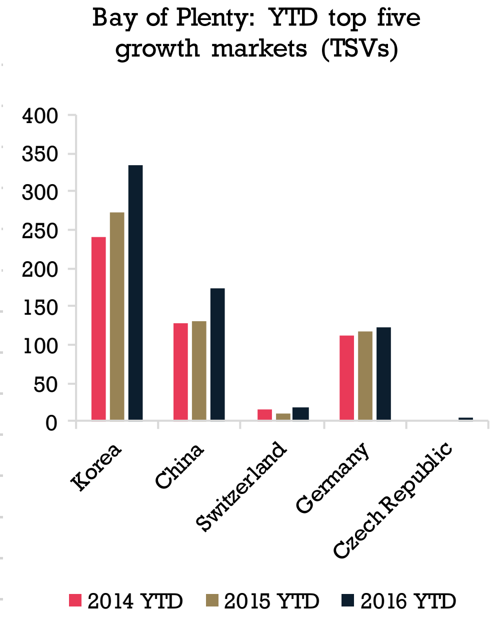
September RSV		September FSV		September TSV		YTD RSV		YTD FSV		YTD TSV	
-34	-27%	-125	-53%	-159	-44%	37	4%	-227	-15%	-190	-7%

YTD (September)









Top FSV shifts

September FSV	Change	%change
Japan	5	250%
Korea	3	18%
Chile	2	-
Nepal	-14	-93%
India	-34	-41%
Philippines	-74	-89%

FSVs YTD	Change	%change
Korea	61	54%
China	19	35%
Japan	7	14%
Brazil	-32	-48%
Philippines	-121	-49%
India	-133	-20%

Key takeaways:

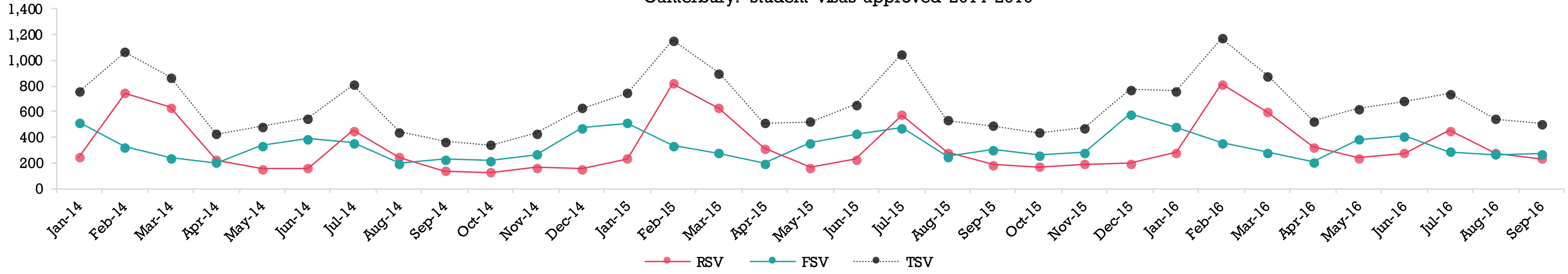
- TSV and FSV approved for Bay of Plenty are both down YTD (-7% and -15% respectively). September 2016 visa approvals declined, with an decrease in RSV (-27%; -34) and a decrease in FSV approvals (-53%; -125) compared to September 2015.
- The PTE sector visas issued have decreased due to decreases for the Philippines and India. However, visas for ITPs have stayed stable, with a decrease for visas issued to citizens of the Philippines being offset by increases in visas for China and India for this sector.
- There have been some changes to the way that regions are recorded in the Immigration NZ data, which have impacted numbers previously published for this region.

Canterbury:

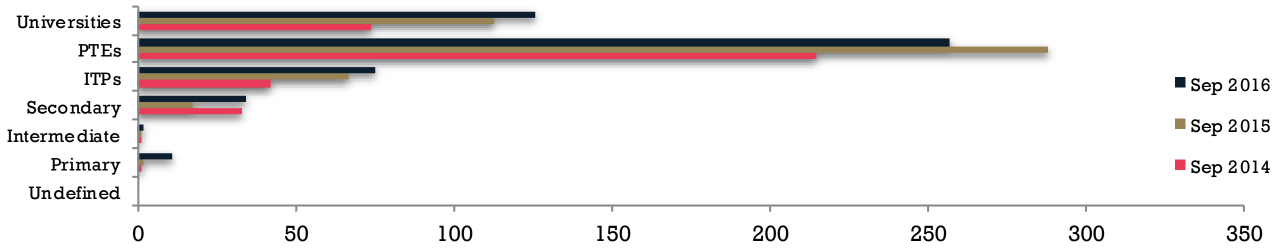
September RSV	September FSV	September TSV	YTD RSV	YTD FSV	YTD TSV
46 ⇧ 25%	-29 ⇩ -10%	17 ⇨ 3%	57 ⇨ 2%	-182 ⇩ -6%	-125 ⇨ -2%

YTD (September)

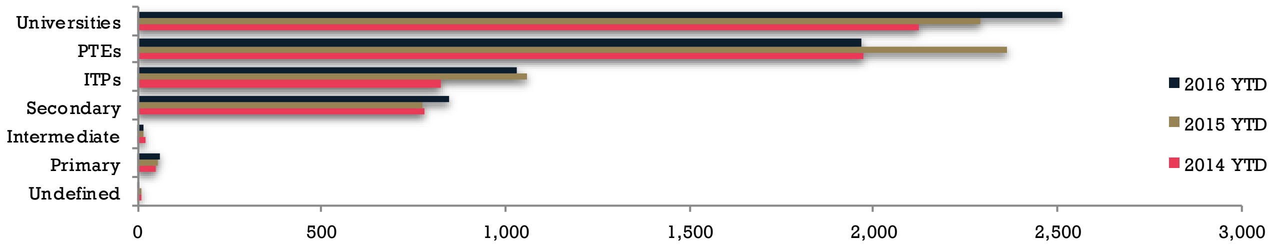
Canterbury: student visas approved 2014-2016



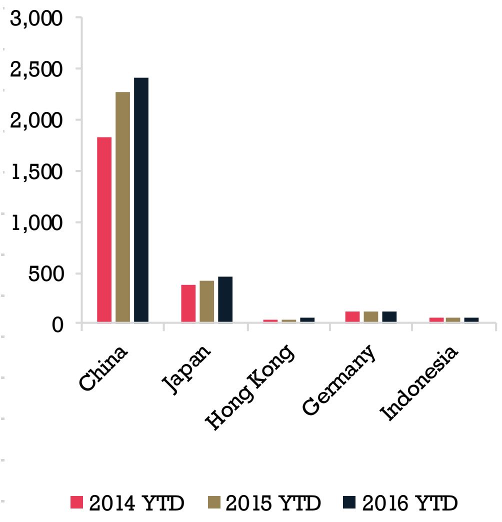
Canterbury: Total student visas approved by sector, September



Canterbury: Total student visas approved by sector, YTD



Canterbury: YTD top five growth markets (TSVs)



Top FSV shifts

September FSV	Change	%change
China	24	30%
Thailand	8	400%
Indonesia	5	125%
Hong Kong	-3	-100%
Philippines	-22	-67%
India	-33	-29%

FSVs YTD	Change	%change
China	41	7%
Hong Kong	15	188%
Indonesia	15	71%
USA	-56	-22%
Philippines	-61	-38%
India	-180	-21%

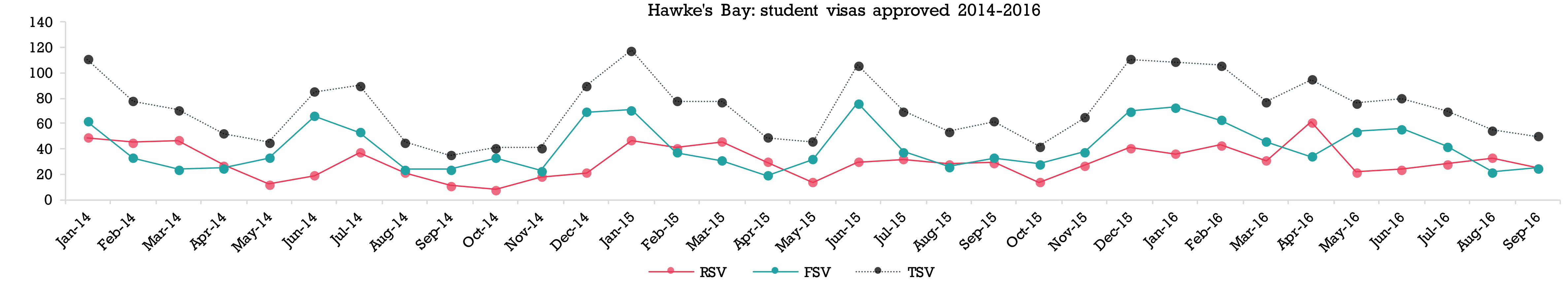
Key takeaways:

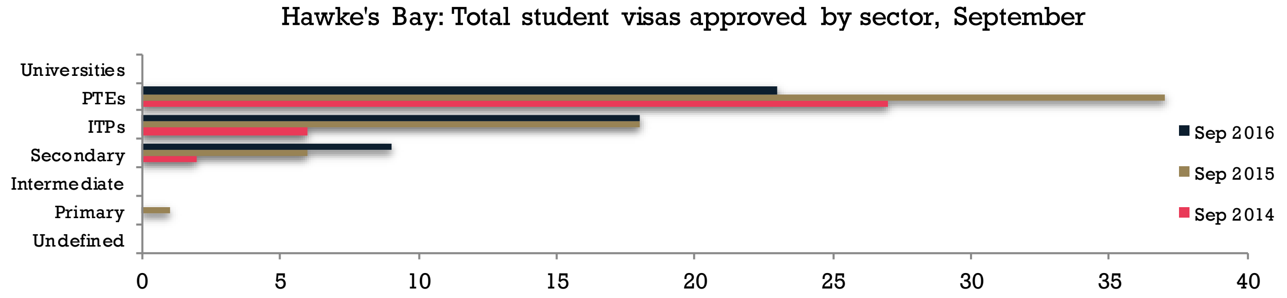
- Canterbury YTD results are down slightly due to a moderate decline in FSV (-6%; -182), compared to 2015 YTD. The September 2016 result was stable with TSV +3% (+17).
- The university sector in Canterbury continues to be the largest sector (39%) and experienced a 10% increase in TSV approved YTD (+223). Secondary schools in the Canterbury region have also seen an increase in TSV YTD (+8%; +76).
- The drop in visas for PTEs was due to a drop in visas issued for India and the Philippines, and there were no significant increases in other markets that offset these decreases.

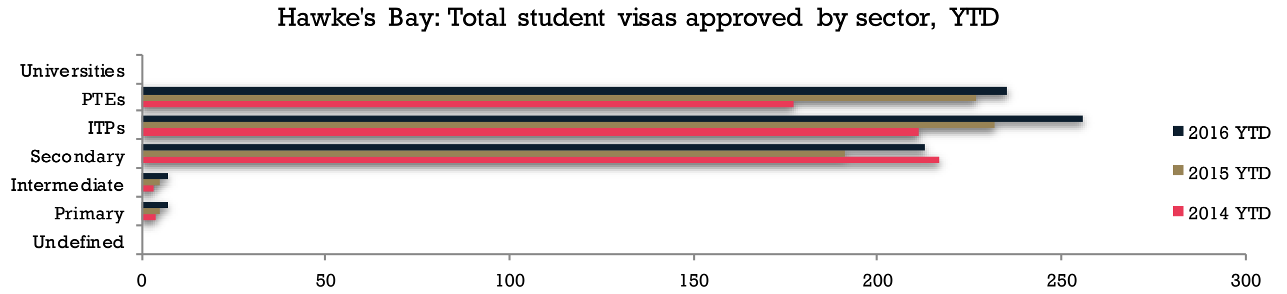
Hawke's Bay:

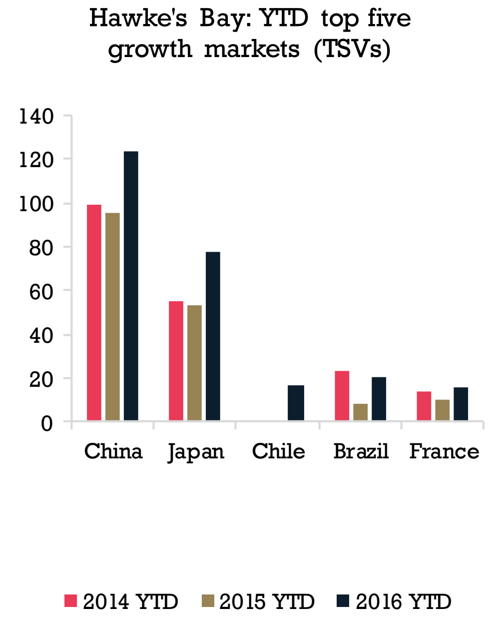
YTD (September)

September RSV		September FSV		September TSV		YTD RSV		YTD FSV		YTD TSV	
-4	-14%	-8	-24%	-12	-19%	6	2%	52	14%	58	9%









Top FSV shifts

September FSV	Change	%change
China	4	200%
France	3	-
Korea	2	-
Philippines	-1	-50%
Viet Nam	-2	-100%
India	-16	-80%

FSVs YTD	Change	%change
China	23	82%
Chile	17	-
Japan	16	62%
Philippines	-3	-27%
Viet Nam	-4	-67%
India	-41	-28%

Key takeaways:

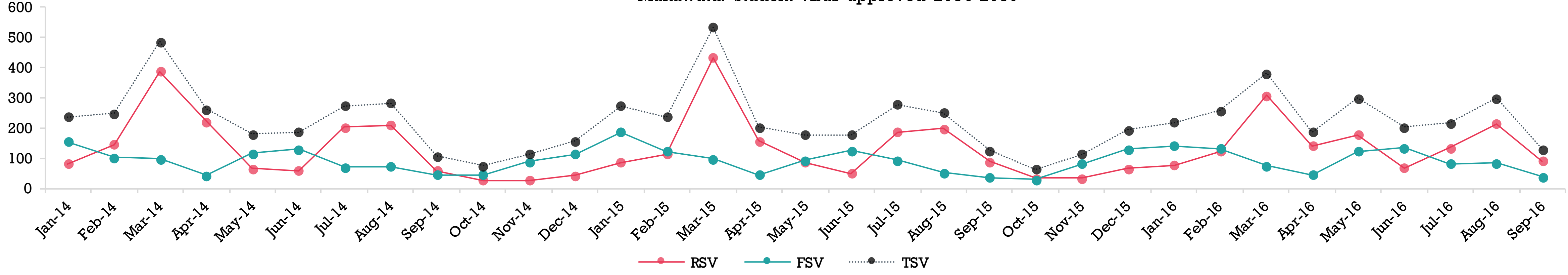
- Results are positive in Hawke's Bay, with a 14% increase in FSV seen YTD (+52). Both types of visas issued in September declined with both RSV (-14%,-4) and FSV (-24%, -8) down compared to September 2015.
- Despite less visas being issued to Indian students studying in PTEs, the number of PTE student visas issued increased. Small increases from a number of countries collectively outweighed the decrease in Indian visas issued.
- There have been some changes to the way that regions are recorded in the Immigration NZ data, which have impacted numbers previously published for this region.

Manawatu:

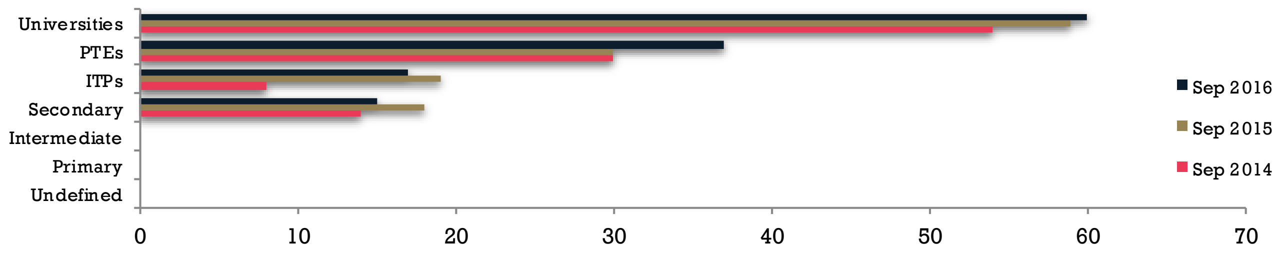
September RSV		September FSV		September TSV		YTD RSV		YTD FSV		YTD TSV	
1	1%	2	5%	3	2%	-69	-5%	-1	0%	-70	-3%

YTD (September)

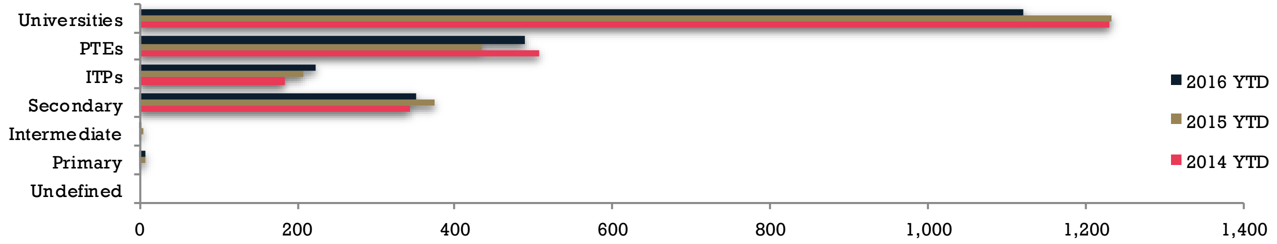
Manawatu: student visas approved 2014-2016



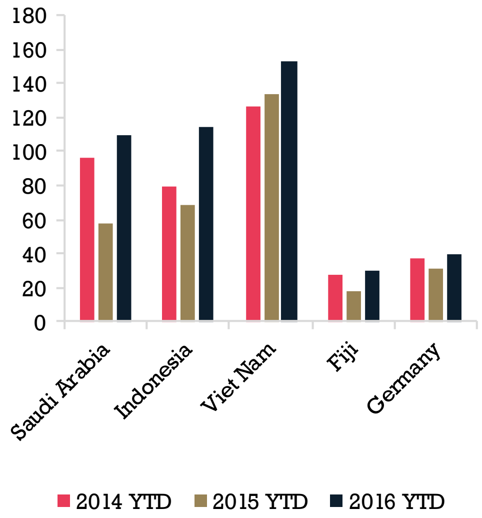
Manawatu: Total student visas approved by sector, September



Manawatu: Total student visas approved by sector, YTD



Manawatu: YTD top five growth markets (TSVs)



Top FSV shifts

September FSV	Change	%change
Indonesia	6	600%
Viet Nam	5	-
Hong Kong	3	-
Korea	-2	-100%
USA	-2	-100%
India	-7	-47%

FSVs YTD	Change	%change
Indonesia	64	582%
Saudi Arabia	25	357%
Germany	12	55%
USA	-28	-33%
India	-56	-36%
Thailand	-56	-71%

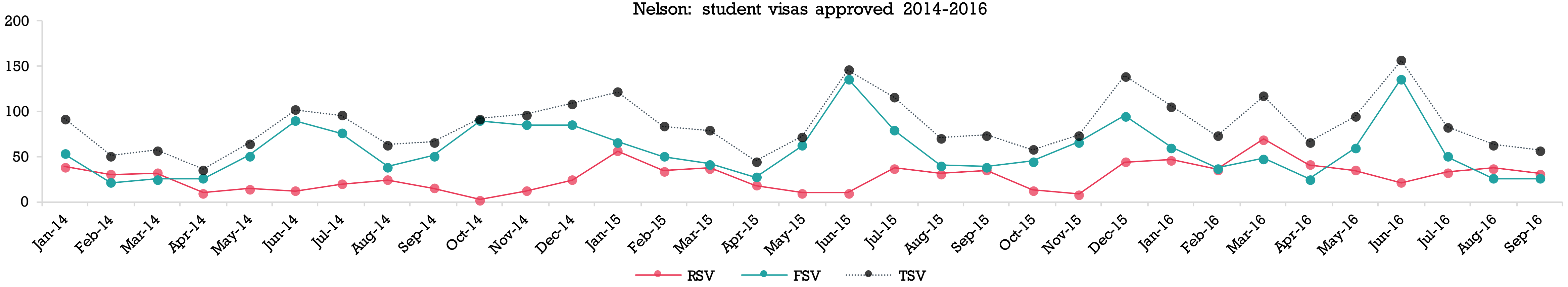
Key takeaways:

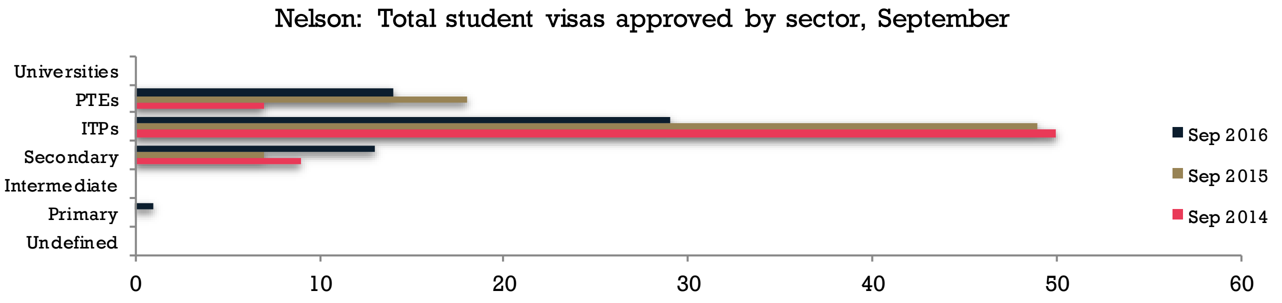
- Manawatu saw an slight increase in September 2016, compared to September 2015 with TSV up 2% (+3) driven by FSV up 5% (+2). YTD results for the region are down, with TSV down 3%.
- Despite the overall decline, the ITP, PTE and primary school sectors have both experienced growth in TSV approved YTD.
- The University sector visa approvals have decreased by 9%. The markets to decrease in the University sector are China (-9%, -47) and the USA (-29%, -33). For the USA market, visa processing delays are a possible cause.

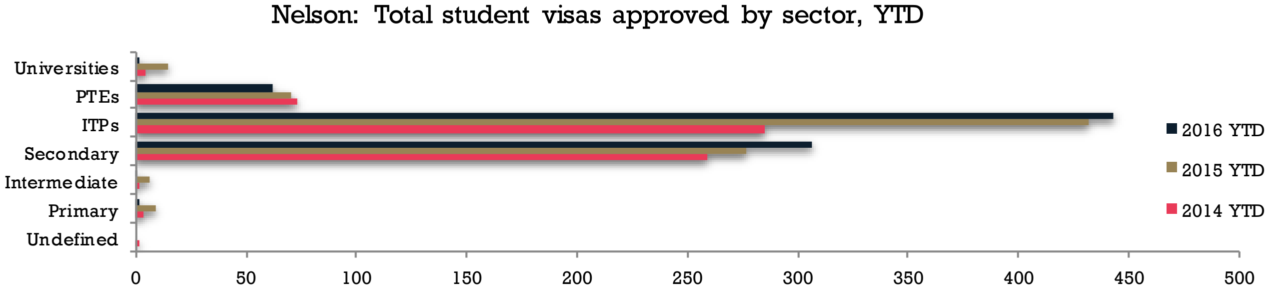
Nelson:

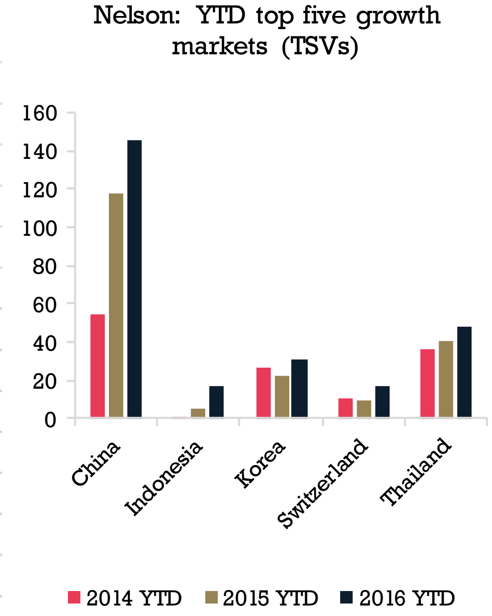
YTD (September)

September RSV		September FSV		September TSV		YTD RSV		YTD FSV		YTD TSV	
-4	-11%	-13	-33%	-17	-23%	81	30%	-74	-14%	7	1%









Top FSV shifts

September FSV	Change	%change
Switzerland	3	300%
Taiwan	2	100%
Japan	1	-
Nepal	-2	-100%
Papua New Guinea	-3	-100%
India	-10	-83%

FSVs YTD	Change	%change
China	30	44%
Japan	18	67%
Korea	10	77%
Sri Lanka	-11	-52%
Papua New Guinea	-12	-92%
India	-119	-73%

Key takeaways:

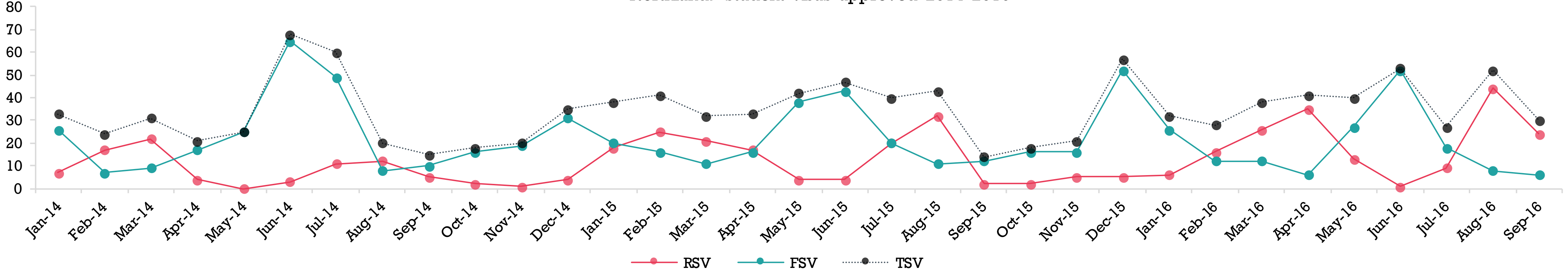
- The Nelson region has experienced a decline in FSV approved YTD (-14%, -74), however a 30% increase in RSV YTD (+81) continues to slightly boost Nelson's overall results.
- The decrease in Indian student visa approvals within the ITP sector has been outnumbered by an increase in the number of Chinese student visas.
- Growth in FSV YTD are from: China (+30), Japan (+18) and Korea (+10).

Northland:

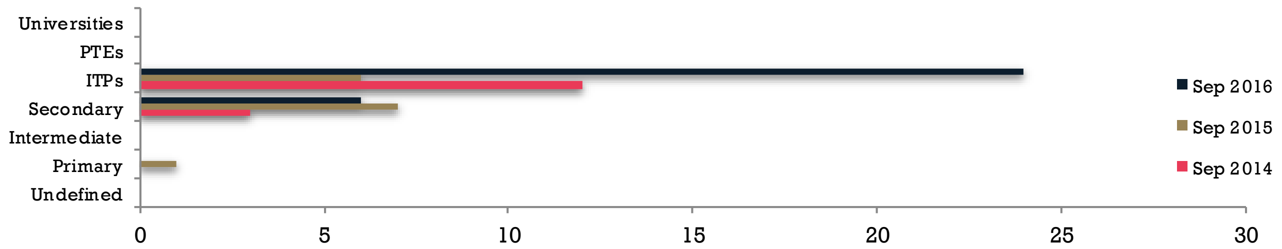
September RSV		September FSV		September TSV		YTD RSV		YTD FSV		YTD TSV	
22	⇧ 1100%	-6	⇩ -50%	16	⇧ 114%	31	⇧ 22%	-20	⇩ -11%	11	⇨ 3%

YTD (September)

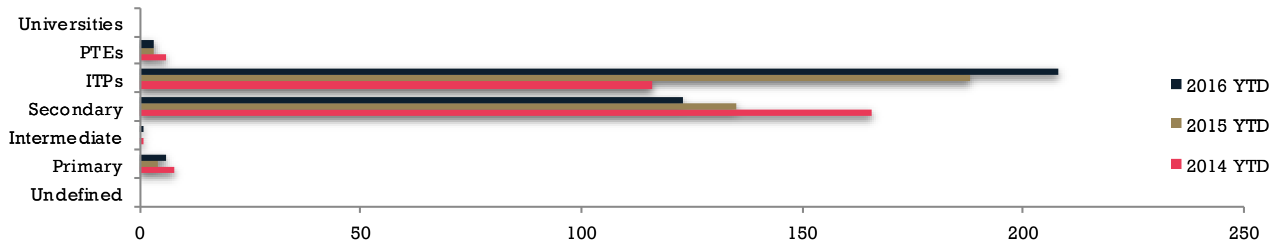
Northland: student visas approved 2014-2016



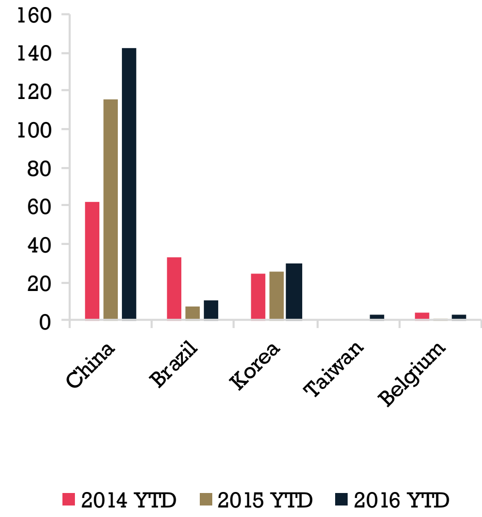
Northland: Total student visas approved by sector, September



Northland: Total student visas approved by sector, YTD



Northland: YTD top five growth markets (TSVs)



Top FSV shifts

September FSV	Change	%change
China	2	100%
Argentina	1	-
France	-1	-100%
Italy	-1	-100%
Korea	-1	-100%
Germany	-5	-100%

FSVs YTD	Change	%change
China	3	7%
Japan	3	300%
Taiwan	3	-
Italy	-4	-31%
Switzerland	-4	-67%
India	-13	-39%

Key takeaways:

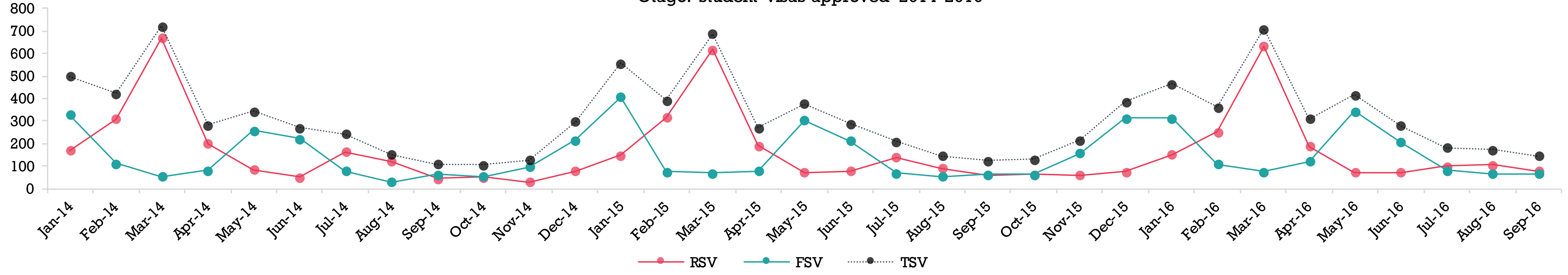
- Northland's results are flat with TSV YTD +3% (+11). September 2016 saw an increase in TSV approved +114% (+16) attributed to a 1100% increase in RSV (+22).
- The secondary schools sector experienced declines in TSV approved in September compared to September 2015. The ITPs sector saw an increase, which was driven by Chinese students, even though the number of Indian students with approved visas for ITPs in Northland has declined.

Otago:

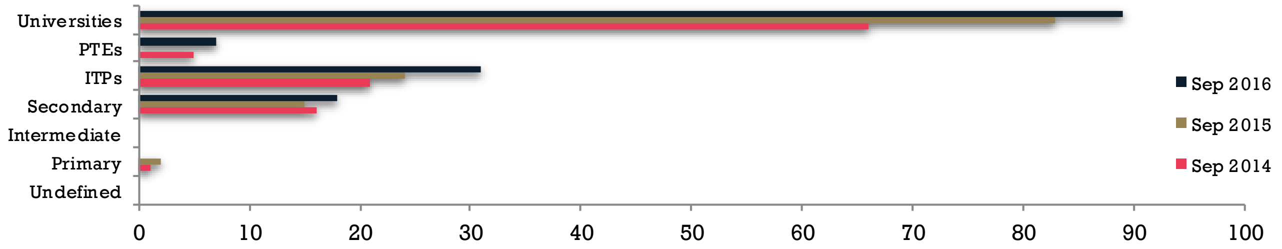
YTD (September)

September RSV		September FSV		September TSV		YTD RSV		YTD FSV		YTD TSV	
17	28%	4	6%	21	17%	-61	-4%	48	4%	-13	0%

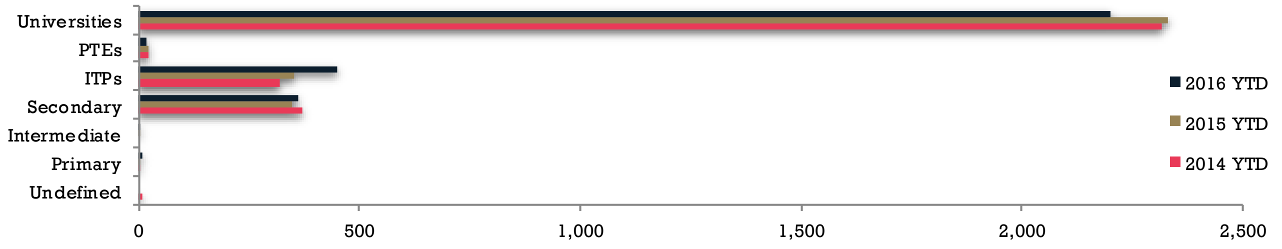
Otago: student visas approved 2014-2016



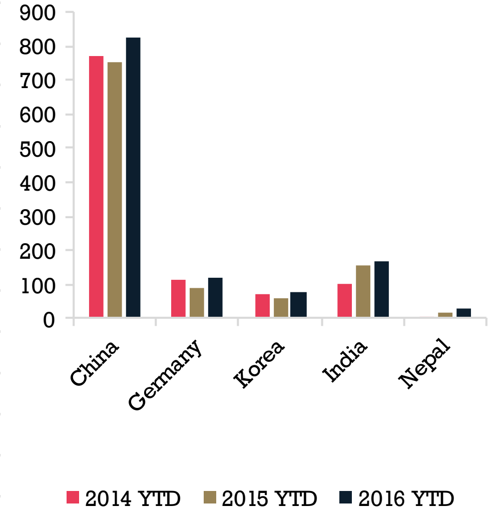
Otago: Total student visas approved by sector, September



Otago: Total student visas approved by sector, YTD



Otago: YTD top five growth markets (TSVs)



Top FSV shifts

September FSV	Change	%change
India	4	57%
Nepal	4	133%
Korea	3	300%
Hong Kong	-2	-67%
Russia	-2	-100%
USA	-3	-60%

FSVs YTD	Change	%change
Germany	33	49%
China	19	13%
Nepal	16	320%
Japan	-7	-9%
UK	-9	-30%
USA	-67	-13%

Key takeaways:

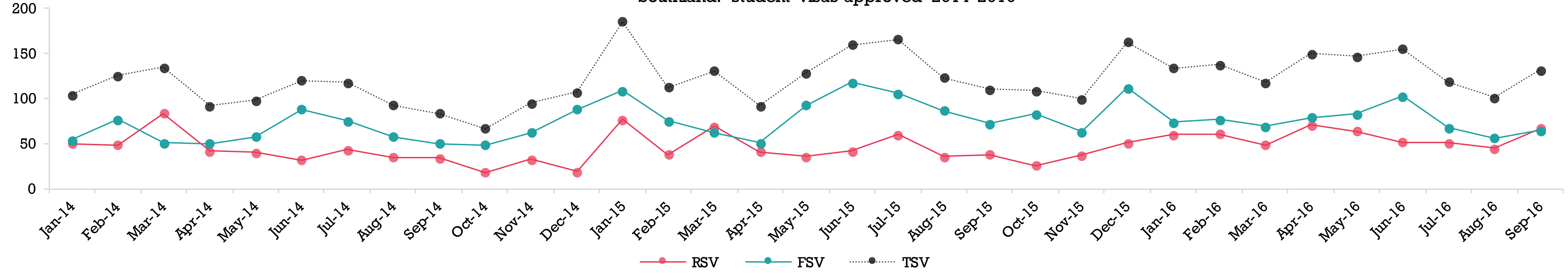
- TSV are stable YTD for the Otago region (-0%, -13). September 2016 results were up across the board with an increase of +21 (+17%) for TSV compared to September 2015.
- ITPs in the Otago region continue to experience strong growth in TSV YTD (+28%, +100) while the university sector has seen a decline (-5%, -127). There has been a 15% decline in total student visas issued to the USA. This is likely a result of processing delays rather than a decrease in demand and is expected to right itself in coming months.

Southland:

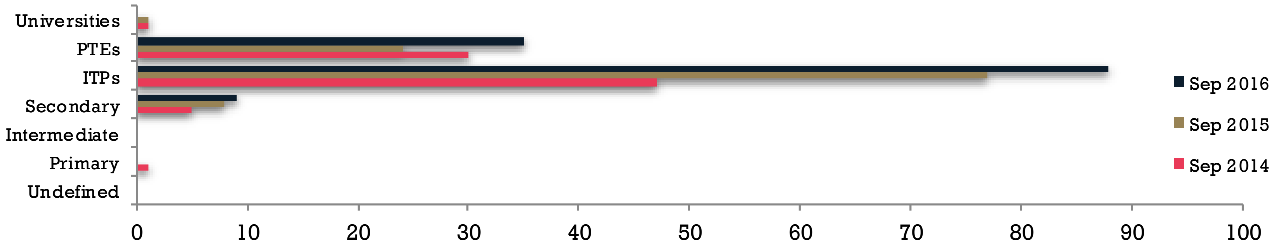
September RSV		September FSV		September TSV		YTD RSV		YTD FSV		YTD TSV	
29	76%	-7	-10%	22	20%	83	19%	-99	-13%	-16	-1%

YTD (September)

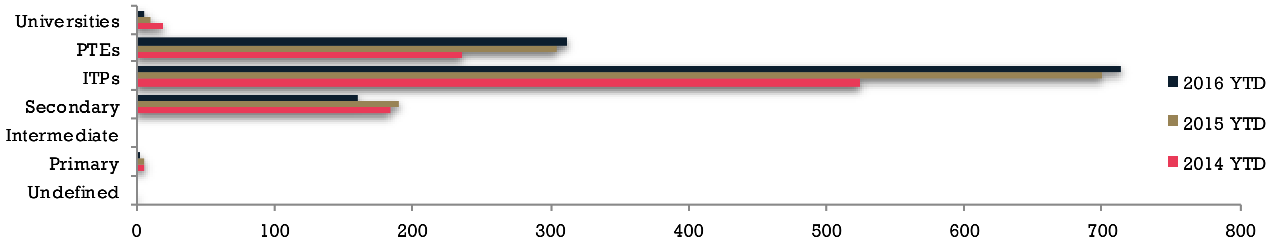
Southland: student visas approved 2014-2016



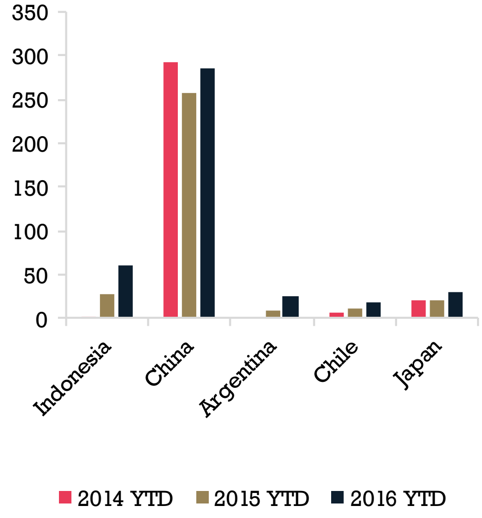
Southland: Total student visas approved by sector, September



Southland: Total student visas approved by sector, YTD



Southland: YTD top five growth markets (TSVs)



Top FSV shifts

September FSV	Change	%change
Philippines	5	500%
Argentina	4	-
Thailand	3	-
Japan	-2	-100%
Korea	-5	-63%
India	-16	-73%

FSVs YTD	Change	%change
Argentina	17	189%
Thailand	11	22%
Chile	8	89%
Viet Nam	-16	-46%
Brazil	-27	-27%
India	-107	-66%

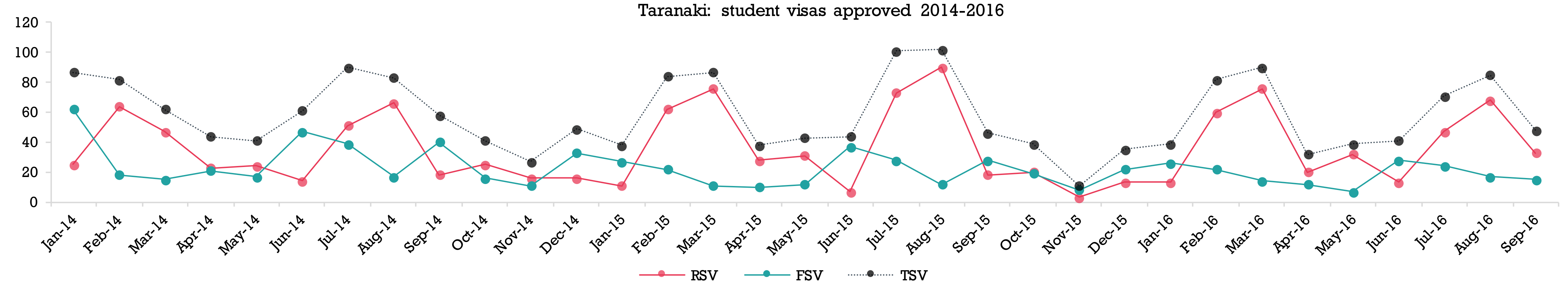
Key takeaways:

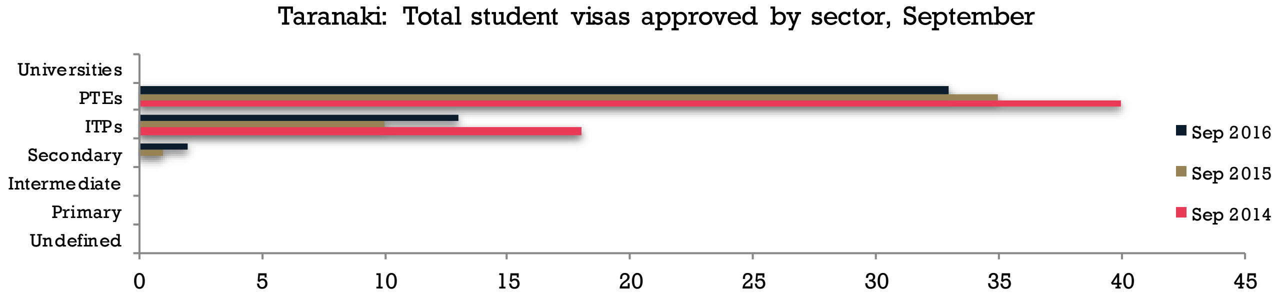
- Southland is experiencing a flat result YTD due to a decline in FSV (down 13%) largely driven by India (-107), and simultaneous growth in RSV up 19% in the region. The increase in RSV YTD (+83) indicates that students are returning or choosing to remain in New Zealand to study.
- RSV were up in September (+76%), which drove the overall increase in TSV (+20%) for the month.
- Southland has not been impacted as much by the introduction of rule 18 because visas from India are less significant in this region. Indian students were never a significant population in the PTE sector, and their decline for the ITPs sector has been offset by increases in students from Korea, China and Indonesia.

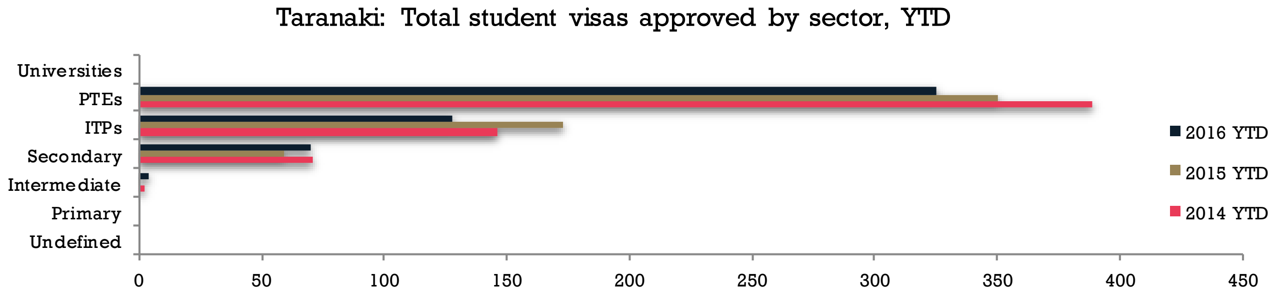
Taranaki:

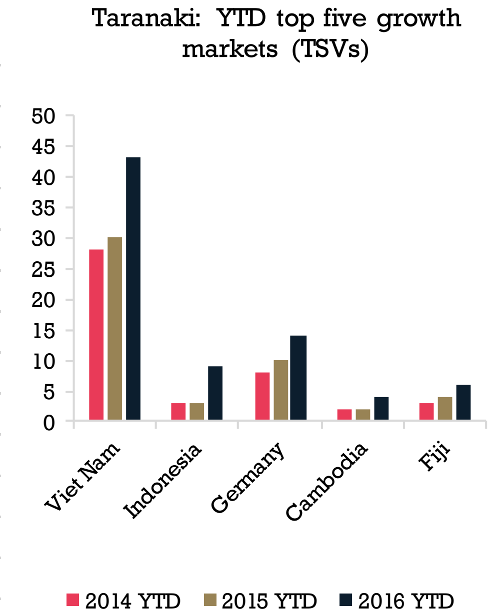
YTD (September)

September RSV		September FSV		September TSV		YTD RSV		YTD FSV		YTD TSV	
15	83%	-13	-46%	2	4%	-34	-9%	-22	-12%	-56	-10%









Top FSV shifts

September FSV	Change	%change
Viet Nam	3	-
Fiji	1	-
Indonesia	1	-
Sri Lanka	-1	-100%
Thailand	-1	-100%
India	-13	-72%

FSVs YTD	Change	%change
Viet Nam	9	900%
China	4	17%
Indonesia	4	400%
South Africa	-2	-100%
Philippines	-4	-100%
India	-42	-39%

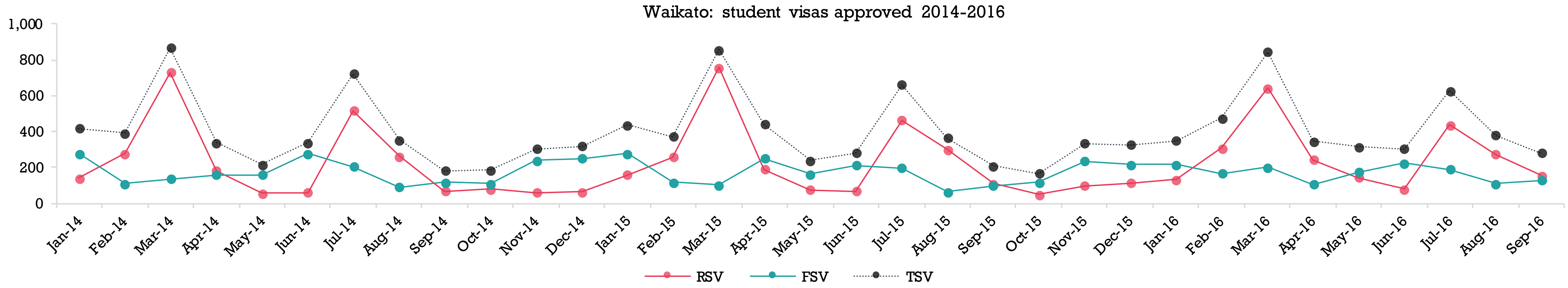
Key takeaways:

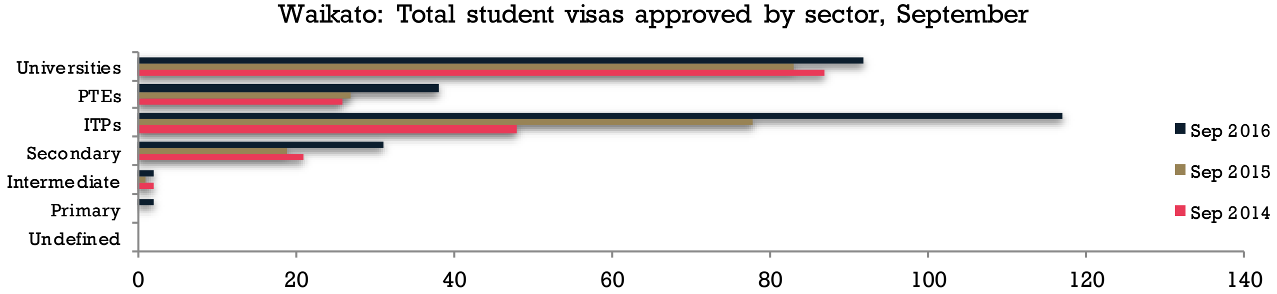
- Taranaki's results are in decline YTD TSV (-10%; -56), with both RSV (-9%;-34) and FSV (-12%;-22) decreasing.
- The highest number of TSV approvals YTD were for the PTE sector, followed by ITPs and secondary schools. PTEs and ITPs for YTD 2016 have both shown a decline in students, with Indian students being the main driver.

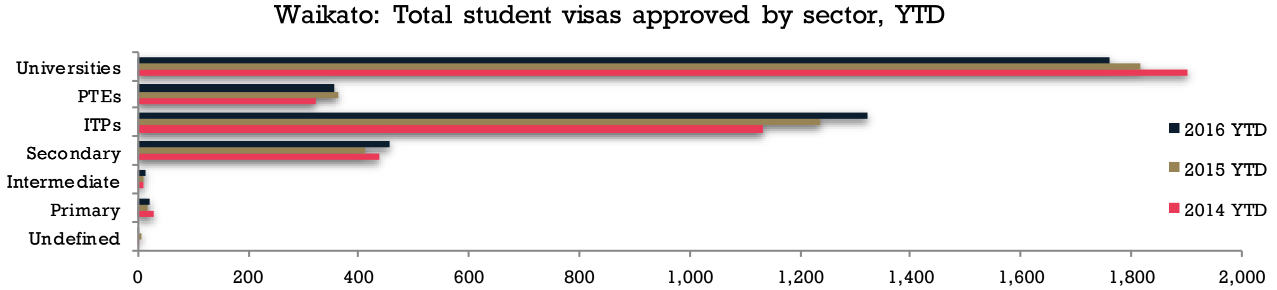
Waikato:

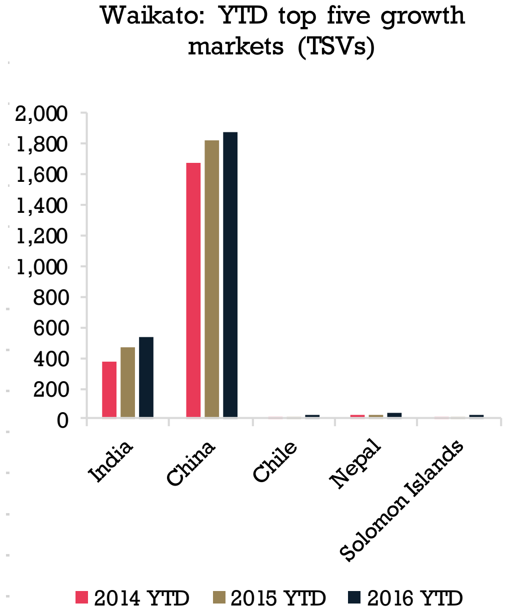
September RSV		September FSV		September TSV		YTD RSV		YTD FSV		YTD TSV	
46	43%	28	28%	74	36%	39	2%	27	2%	66	2%

YTD (September)









Top FSV shifts

September FSV	Change	%change
India	17	113%
China	8	19%
Korea	4	400%
Indonesia	-2	-100%
UK	-4	-50%
Brazil	-9	-100%

FSVs YTD	Change	%change
India	50	19%
Chile	17	850%
Nepal	17	340%
UK	-14	-10%
Korea	-15	-28%
China	-38	-8%

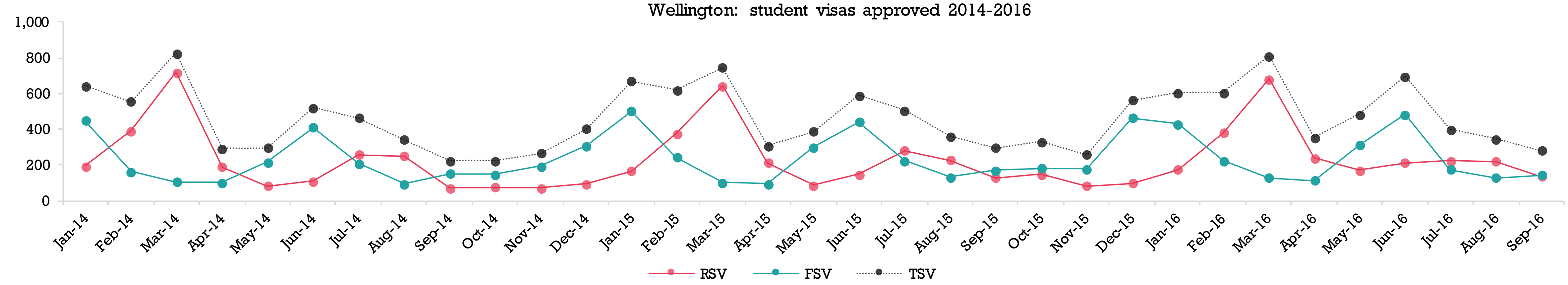
Key takeaways:

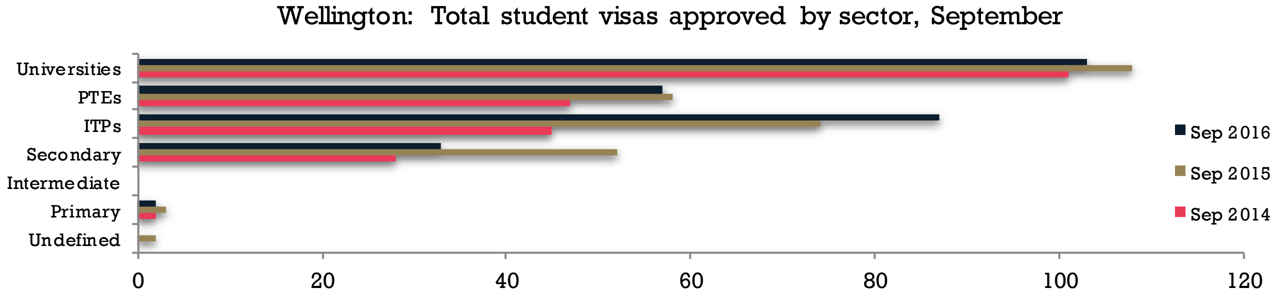
- Overall results for the Waikato region are stable YTD (2%, +66).
- FSV were up in September (+28%), as were RSV (+43%). The net result was an increase in TSV of 36% (+74) compared to September 2015.

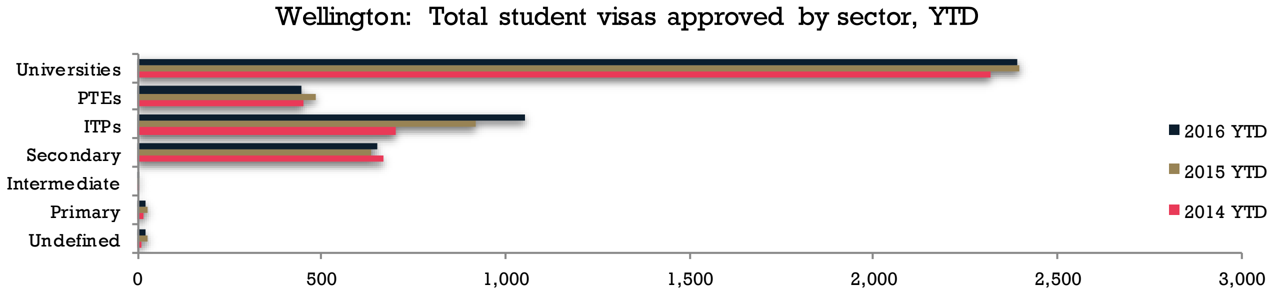
Wellington:

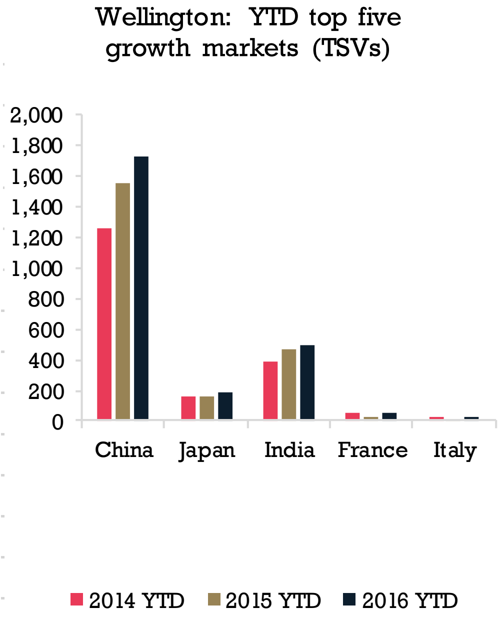
September RSV			September FSV			September TSV			YTD RSV			YTD FSV			YTD TSV		
10	↑	8%	-25	↓	-15%	-15	↓	-5%	173	↑	8%	-72	→	-3%	101	→	2%

YTD (September)









Top FSV shifts

September FSV	Change	%change
Chile	3	-
France	3	300%
Switzerland	2	-
Brazil	-4	-36%
India	-4	-21%
Indonesia	-11	-73%

FSVs YTD	Change	%change
Japan	32	29%
Thailand	20	49%
Malaysia	17	25%
India	-23	-8%
Brazil	-29	-35%
USA	-59	-21%

Key takeaways:

- The result for Wellington was flat due to nn increase in RSV YTD (+8%; +173), has resulted in a overall flat result for the region YTD. September 2016 showed a small decline in visas issued with 15 fewer TSV approvals compared to September 2015.
- The growth in TSV YTD is occurring in the ITP +15% (+136) sector.