

Visa Dashboard: July 2017



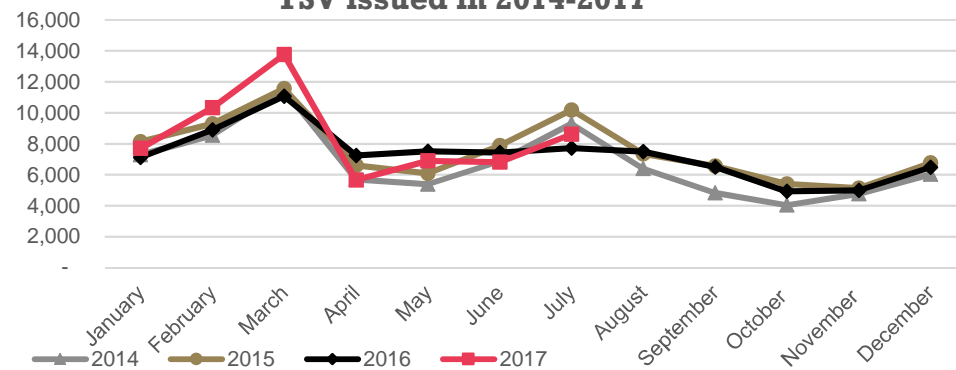
59,785 total student visas (TSV) year to date (YTD), up 5% (+2,774) on YTD 2016. **25,026** first-time student visas (FSV), up 4% (+886) on YTD 2016. **34,759** returning student visas (RSV), up 6% (+1,908) on YTD 2016.

Overview

- TSV are showing signs of recovering from the preceding three months of lower numbers and are now up 5% (+2,774) for the year to date (YTD) when compared to the YTD 2016. The TSV increase has been partly inflated by increased returning student visa numbers from Chinese students who only part-paid their tuition fees for 2017. The same pattern occurred with Chinese students in 2016 but was overwhelmed by the decrease in Indian students renewing visas.

- VSV are up 4% (+2,587) for the YTD when compared to 2016. This is despite a (-3,717) 15% decrease for private training establishments (PTE) which has resulted from a 38% decrease in PTE VSV for India. The India decrease has been exacerbated by increased India VSV in the preceding year.

TSV issued in 2014-2017



- VSV for all other sectors are showing sufficient growth to slightly exceed the decline in VSV for the India market.

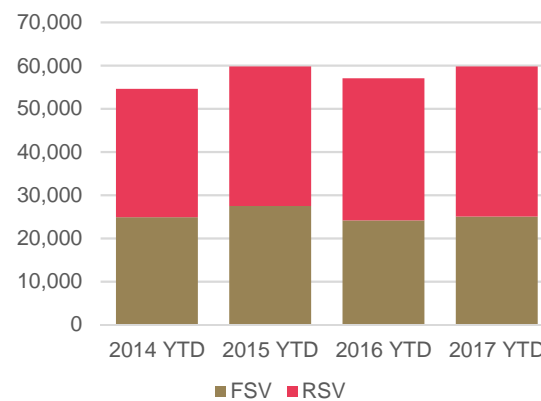
- Overall, growth in China is the main contributor to the continued growth in student numbers this year with China VSV up 13% (+3,086) on this time last year.

- The current VSV numbers suggest total student numbers will be slightly up on 2016 student numbers. The value of the industry is likely to remain up on 2016 due to increased student numbers and a higher percentage studying at universities.

- Key markets with FSV increases YTD were USA (+20%, +293), Viet Nam (+61%, +235), Colombia (+39%, +173), Chile (46%, +142), Brazil (+13%, +135), China (+2%, +116), and Sri Lanka (+41%, +108). Germany had an FSV decrease (-14%, -150).

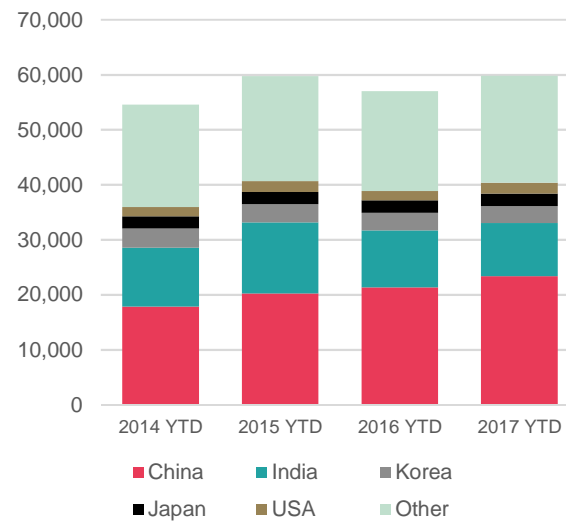
- FSV increases for the YTD were in the Universities (+14%, +886), Schools (+3%, +114) and ITP (+9%, +336) sectors. The PTE sector declined (-5%, -446).

Total RSV and TSV YTD 2014-2017



Markets

TSV by market



- Most key markets are showing TSV increases for the YTD.

- China: TSV are up 9% (+2,021), and FSV are up 2% (+116). Most of the FSV increase for China has been in the PTE (+3%, +52) and ITP (+5%, +44) sectors.

- India is continuing to rebalance: FSV declined for the PTE sector (-41%, -872), but increased for the ITP (+13%, +284) and universities (+37%, +209) sectors.

Sectors

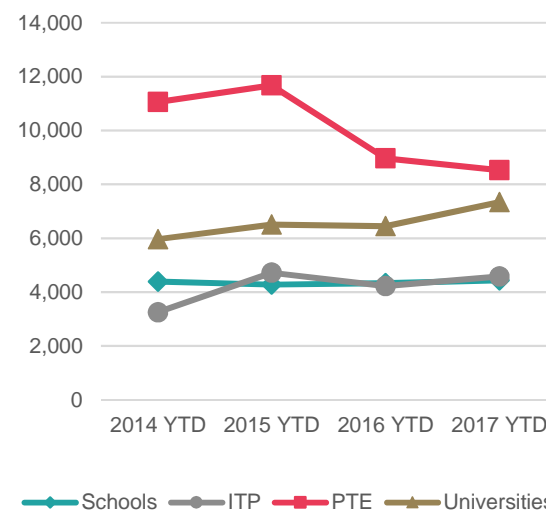
- Universities sector FSV grew by 14% (+886) compared to the YTD 2016. This growth came from increased FSV for the USA (+21%, +274), India (+38%, +183) and Viet Nam (+101%, +114). All regions with universities showed increases, especially the Auckland (+13%, +384), Otago (+15%, +139) and Waikato (+36%, +165) regions.

- Schools sector FSV grew by 3% (+114) compared to the YTD 2016. This growth came from FSV for secondary schools for Chile (+142%, +85), and Italy (+80%, +70) markets, while the Germany market decreased (-14%, 101).

- ITP sector FSV increased by 9% (+366) compared to the YTD 2016. Most of this increase has been confined to Auckland (+23%, +391), while Canterbury (-22%, -78) decreased in FSV.

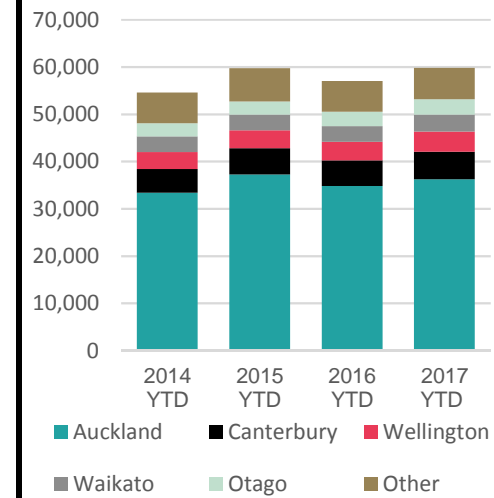
- PTE sector FSV decreased (-5%, -446) compared to the YTD 2016, which follows a decrease in visas for the India market (-41%, -872). The India market decrease was offset by increases in the the Latin America (+31%, +447) and South East Asia (+16%, +184) markets.

FSV by sector YTD 2014-2017



Regions

TSV by region



- FSV increased for the Waikato (+25%, +315), Auckland (+2%, +305), Wellington (+10%, +187), Otago (+12%, +154) and Southland (+25%, +136) regions. For the Waikato and Otago, this was in the universities sector, while the Wellington increases were in the schools sector. Auckland's increases were in the ITP and universities sectors and the Southland increases were in the PTE sector.

- FSV decreased for Hawke's Bay (-29%, -105) and Bay of Plenty (-9%, -94). For Hawke's Bay, this was for the PTE and Schools sectors, and in the Bay of Plenty, this has been led by the PTE sector.

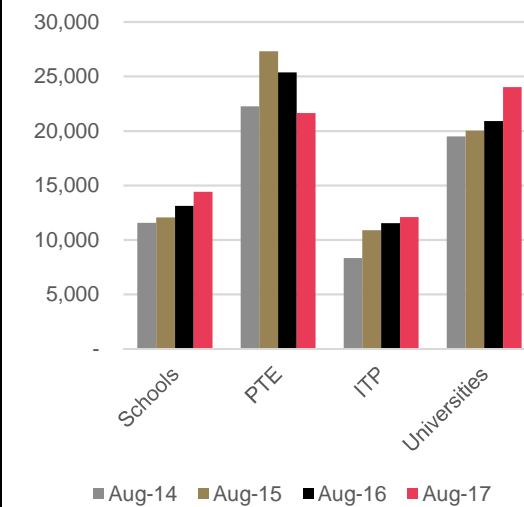
Valid student visas

- Compared to August 2016, VSV for August 2017 have been stable, increasing by 4% (+2,587). This is despite a significant decrease in VSV for the PTE sector (-15%, -3,717).

- Compared to August 2016, VSV for the Universities (+13%, +3,119), Schools (+9%, +1,307), and ITP sectors (+4%, +538) have increased.

- VSV for China increased by 13% (+3,093) followed by VSV for South East Asia (+8%, +686), Latin America (+25%, +648), Europe (+11%, +542) and North America (+24%, +404). These increases have exceeded the 20% (-3,263) decrease in the India market.

VSV by sector



- There was a 38% (-3,883) decrease for India PTE VSV. However, India VSV for Universities increased (+29%, +356).

Note: VSV are the number of valid student visas for New Zealand on the first day of the month. VSV are used as an indicator of student numbers. They do not differentiate between FSV or RSV. Students on a work or visitor visa are not captured by this dataset so total student numbers will be higher than this data set shows.

1. Student visas only capture students who enter New Zealand with a student visa. These students are mostly those who are planning to study for more than three months. Students who undertake a course less than three months in duration are not required to enter on a student visa. Students who do choose to enter on a visitor visa (usually from visa-free nationalities) are not captured in this dashboard. Working holiday visas also allow students to study for up to six months. Those who enter New Zealand on a working holiday visa who plan on taking up this option are also not included in this dashboard. These factors will impact the PTE (including English Language Schools) numbers. 2. 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. This dashboard excludes dependants, applicants under Section 61, and Variation of Conditions.