

Visa Dashboard: June 2017



51,191 total student visas (TSV) year to date (YTD), up 4% (+1,913) on YTD 2016. **21,908** first-time student visas (FSV), up 4% (+757) on YTD 2016. **29,283** returning student visas (RSV), up 4% (+1,156) on YTD 2016.

Overview

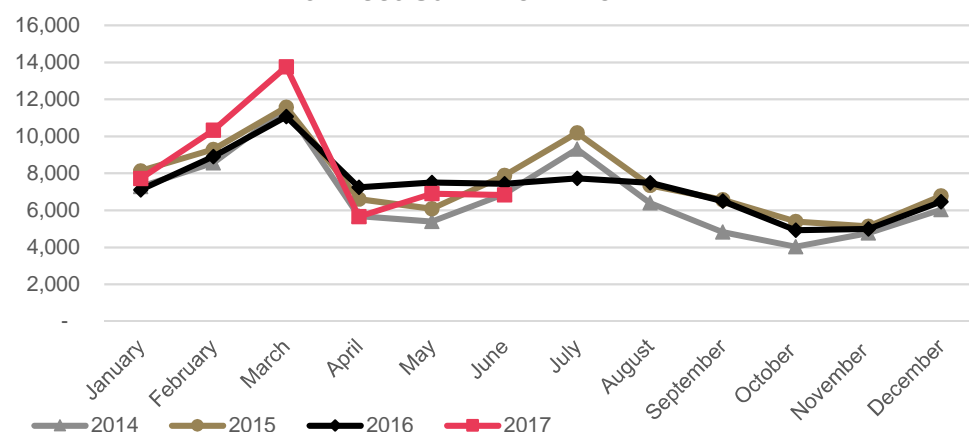
- TSV have continued to decline since April. The decline is due, in part, to quicker processing times earlier in the year for increased university visas, which front-loaded figures. This was followed by decreased visas for Indian students in the private training institute (PTE) sector.

- Despite three months of decreases, TSV remain up 4% (+1,913) on the YTD 2016. However, valid student visas (VSV) show only a 2% (+1,438) increase for the YTD, and that VSV for PTE are down 19% (-4,313). This is due to a 41% decrease in VSV for India for the PTE sector. This decrease has been exacerbated by increased India visas immediately prior to the implementation of Rule 18 in October 2015.

- Unlike PTE, all other sectors are showing growth, which is counter-balancing the decline in the PTE sector.

- Student numbers for 2017 are likely to be on par with 2016 numbers. However, the value of the industry will be up on 2016.

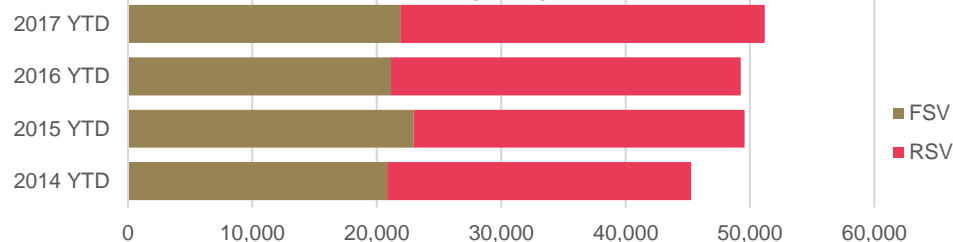
TSV issued in 2014-2017



- Key markets with FSV increases YTD were USA (+20%, +283), Viet Nam (+63%, +208), Brazil (+21%, +176), China (+4%, +181), Colombia (+41%, +154), Chile (54%, +143) and Sri Lanka (+51%, +108). Germany had an FSV decrease (-13%, -122)

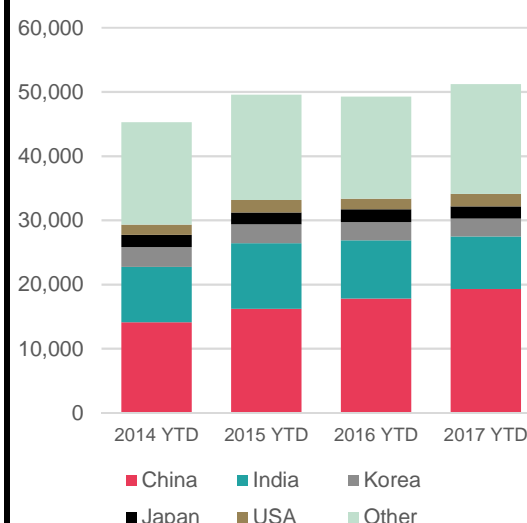
- FSV increases for the YTD were in the universities (+15%, +879), schools (+6%, +240) and ITP (+5%, +172) sectors. The PTE sector declined (-6%, -489).

Total RSV and TSV YTD 2014-2017



Markets

TSV by market



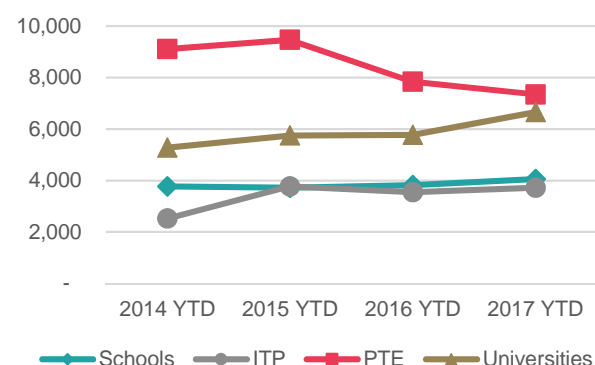
- Most key markets are showing TSV increases for the YTD.

- China: TSV are up 8% (+1,486), and FSV are up 4% (+181). Most of the FSV increase for China has been in the PTE (+6%, +85) and ITP (+8%, +53) sectors. RSV were up 10% (+1,305), mainly in the schools (+26%, +540) and universities sectors (+9%, +568).

- India is in the process of rebalancing: FSV declined for the PTE sector (-44%, -894), but increased for the universities (+38%, +183) sector.

Sectors

FSV by sector YTD 2014-2017



- Universities sector FSV grew by 15% (+879) 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 (+16%, +402), Otago (+15%, +135) and Waikato (+39%, +158) regions.

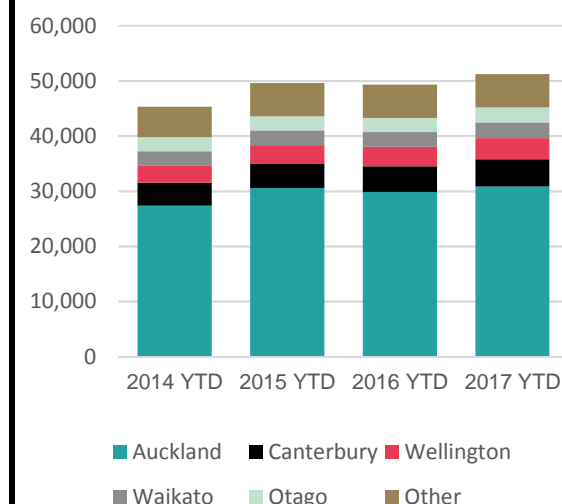
- Schools sector FSV grew by 6% (+420) compared to the YTD 2016. This growth came from FSV for secondary schools for Chile (+131%, +72), Brazil (+25%, +53), and Italy (+103%, +79) markets, while the Germany market decreased (-12%, 79).

- ITP sector FSV increased by 5% (+172) compared to the YTD 2016. Most of this increase has been confined to Auckland (+21%, +302), while Canterbury (-25%, -71) and Bay of Plenty (-11%, -43) decreased in FSV.

- PTE sector FSV decreased (-6%, -489) compared to the YTD 2016, which was caused by a decrease in visas for the India market (-44%, -894). The India market decrease was offset by increases in the Latin America (+32%, +401) and South East Asia (+15%, +144) markets.

Regions

TSV by region



- FSV increased for the Waikato (+27%, +294), Auckland (+2%, +283), Wellington (+10%, +176), Otago (+13%, +156) and Southland (+23%, +111) regions. These increases mainly came from the universities sector, except for Southland where it came from the ITP and PTE sectors.

- FSV decreased for Hawke's Bay (-34%, -111) and Bay of Plenty (-11%, -112). For Hawke's Bay, this was for the PTE sector, and in the Bay of Plenty, this has been led by the PTE and ITP sectors.

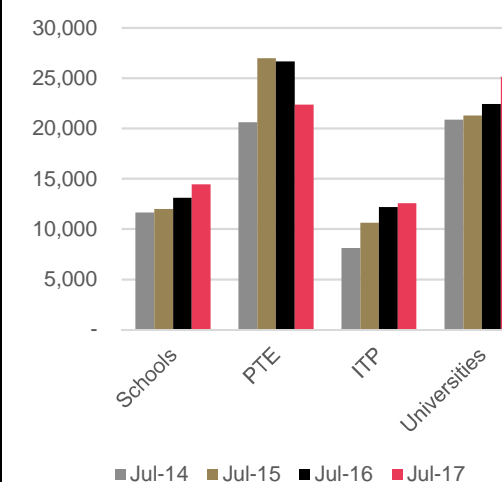
Valid student visas

- Compared to June 2016, VSV for July 2017 have been stable, increasing slightly by 2% (+1,438). This is despite a significant decrease in VSV for the PTE sector (-19%, -4,313).

- Compared to July 2016, VSV for the universities (+11%, +2,706), schools (+9%, +1,331) sectors have increased, while those for the ITP sector (+3%, +380) have stayed flat.

- VSV for China increased by 13% (+3,086) followed by VSV for Latin America (+26%, +682), South East Asia (+7%, +651), Europe (+10%, +515) and North America (+10%, +293). These increases have exceeded the 23% (-4,098) decrease in the India market.

VSV by sector



- There was a 41% (-4,484) decrease for India PTE VSV. However, India VSV for universities increased (+29%, +354).

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.