Overall student visa trends
November 2016

NEW ZEALAND
IMMIGRATION

Caveats and notes

1. Student visas verses 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. Total student visas (TSV), year to date (YTD), are down -4% (-3,262), first time student visas (FSV) are down -13% (-5,225), and returning student visas (RSV) are up +4% (+1,963), when compared to the same period 2015.

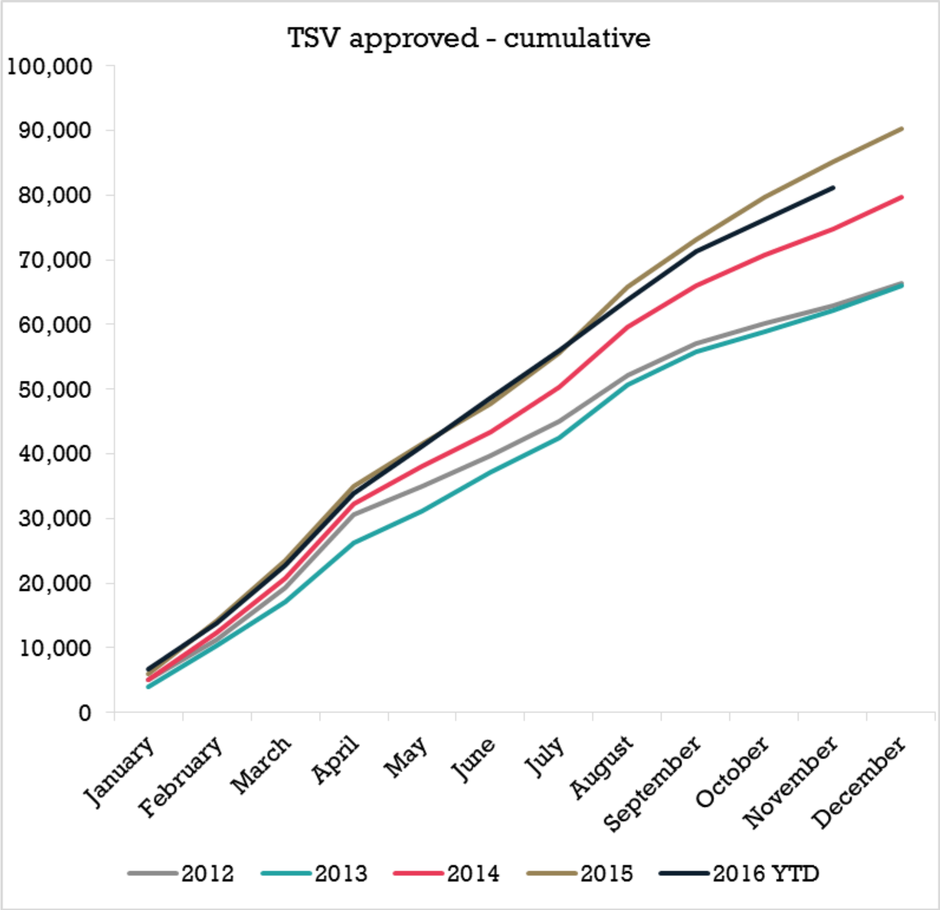
2. China and India, which combined are 50% of the NZ international education market, are the two biggest markets currently impacting the wider education market.
   - India student numbers continue to decline, while China student numbers are slowly increasing. However, the increases in Chinese students will not be enough to offset the decline in the Indian market in the year ahead.

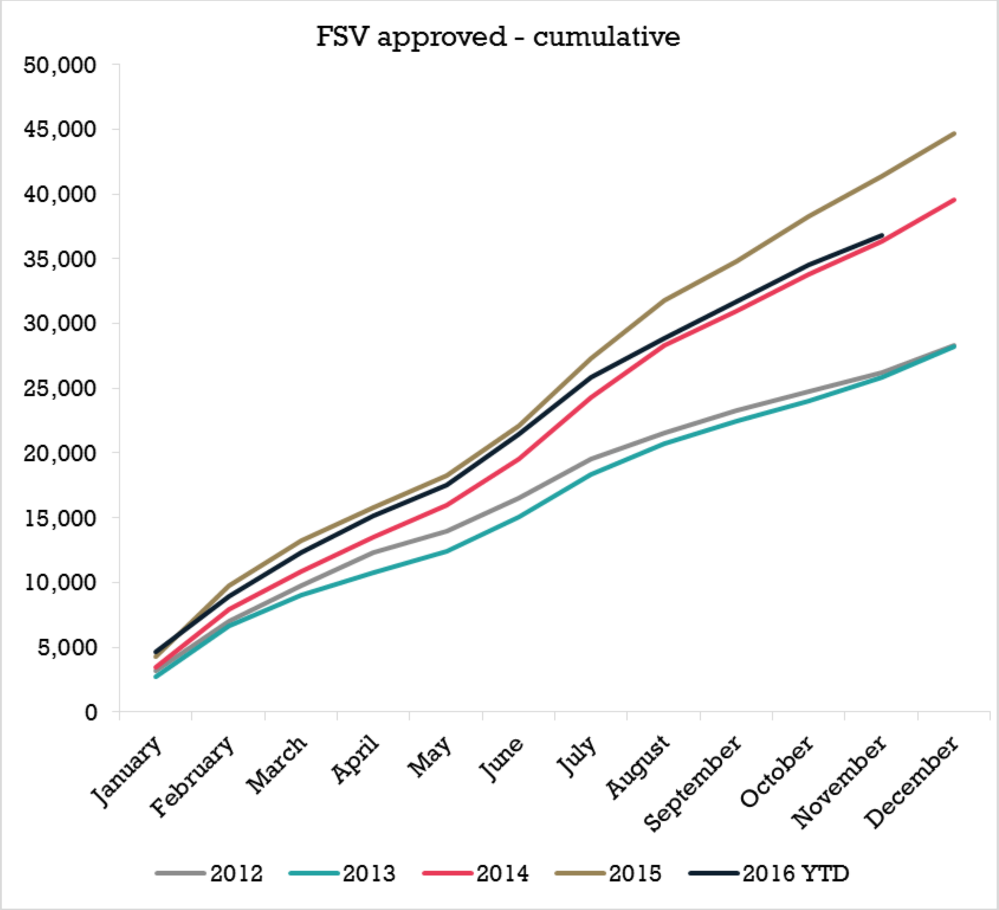
2. Indian FSVs are down by 4,974 when compared to YTD 2015, a decrease of 41%.
   - The surge in FSVs applications prior to Rule 18 implementation created a bubble of FSVs in 2015 which has exacerbated the decline.
   - Indian TSVs for the month of November 2016 (886) are now at the lowest number since December 2013.
   - Despite the decrease in FSVs, total Indian student numbers from January to August 2016 had increased by 14% (compared to YTD 2015), although enrolments slightly dropped in the private training enterprises (PTE) sector.
   - Decreases in FSV for 2016 are expected to manifest as a sudden decrease in Indian student numbers in the 2017 year particularly at the PTE and institutes of technology and polytechnics (ITP) levels (95% of Indian tertiary students are at PTEs and ITPs).
   - A number of ITPs are particularly dependent on Indian students and a sudden decline on these will impact income streams at these providers, with a potential impact on domestic students.

3. Chinese student TSVs grew by 9% (+2,540) for November YTD which helped offset some of the decline in FSVs from India
   - FSVs for Chinese are up 7% (+534). Most of this increase is from the PTE sector (+303)
   - RSVs for China are up 10% (+2,006), with increases at universities (779), PTEs (661) and secondary schools (541)
   - There has been a 9% increase in Chinese students studying in New Zealand from January to August 2016 when compared to the same period in 2015.

4. Total student numbers for 2016 are expected to be up 5-7% on 2015 numbers. However, student numbers for 2017 are anticipated to be slightly down on 2016 numbers.

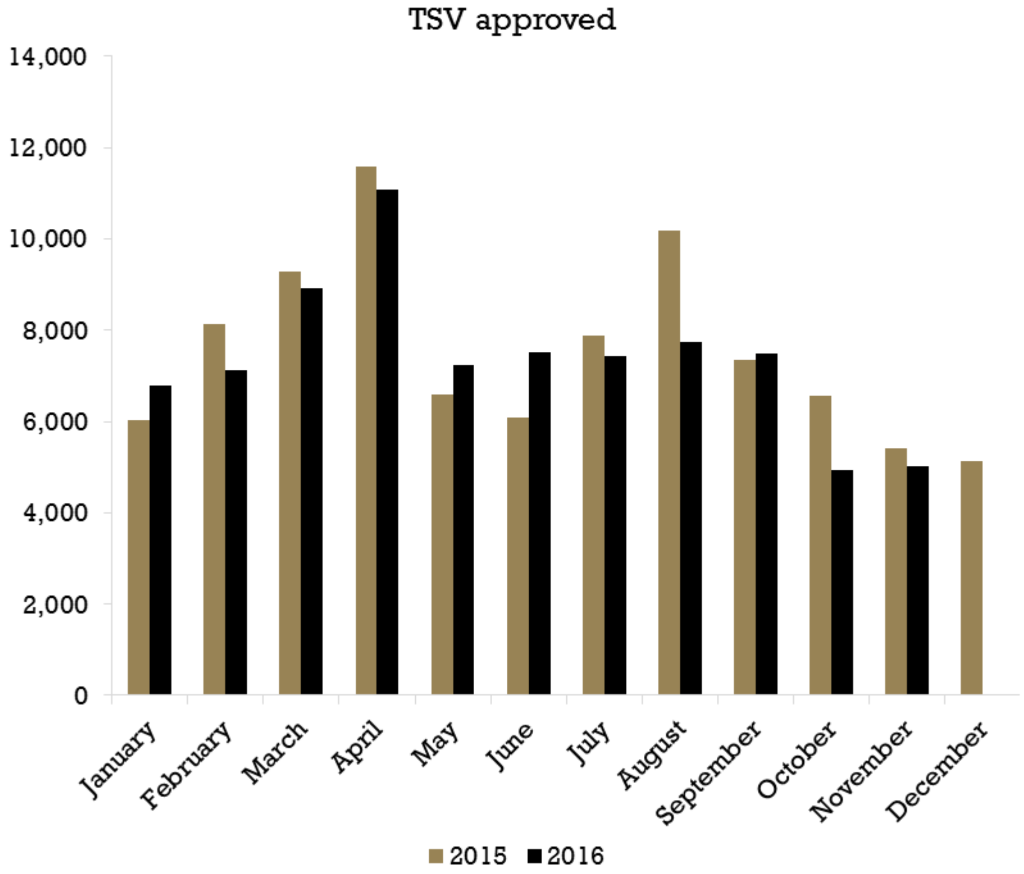
Comparison to previous years (Cumulative)

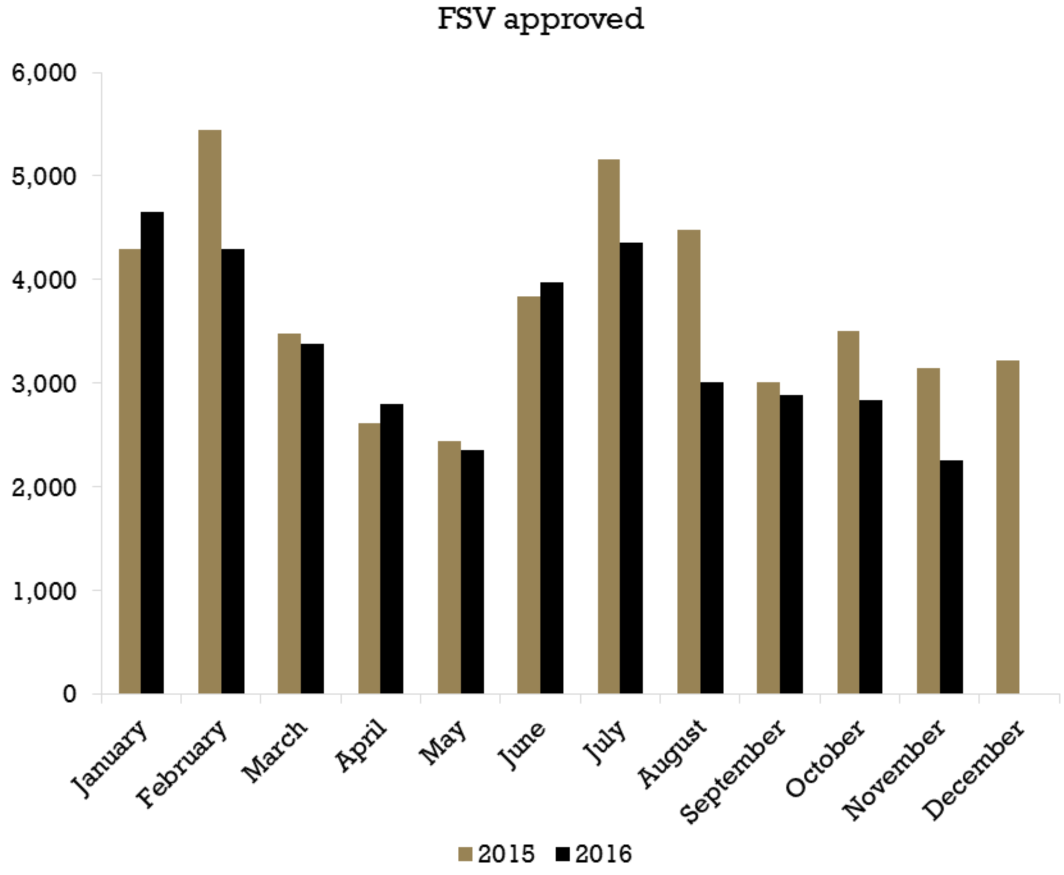




- Total student visas are down (-4%) compared to the same period last year, with 80,954 TSVs approved in 2016 YTD compared to 84,216 in 2015 YTD.
- Overall FSVs are down 13% (-5,225) against 2015 YTD. (35,121 in 2016 YTD compared to 40,346 in 2015 YTD).
- A drop in FSV from India (-4,974) and the Philippines (-1,132) has led the to a decline in FSV YTD.
- While there is a decline in TSVs and FSVs YTD, students choosing to renew student visas (RSVs) is +5%, with an additional 1,998 students visas when compared to the same period last year. This is partially cushioning the decrease in FSVs.

Month-on-Month comparison to previous year





November 2016 TSVs (-7%, -385) and FSVs (-28%, -885) were both down compared to November 2015. The decrease in FSVs was partially offset by the increase in RSVs +6% (+265).

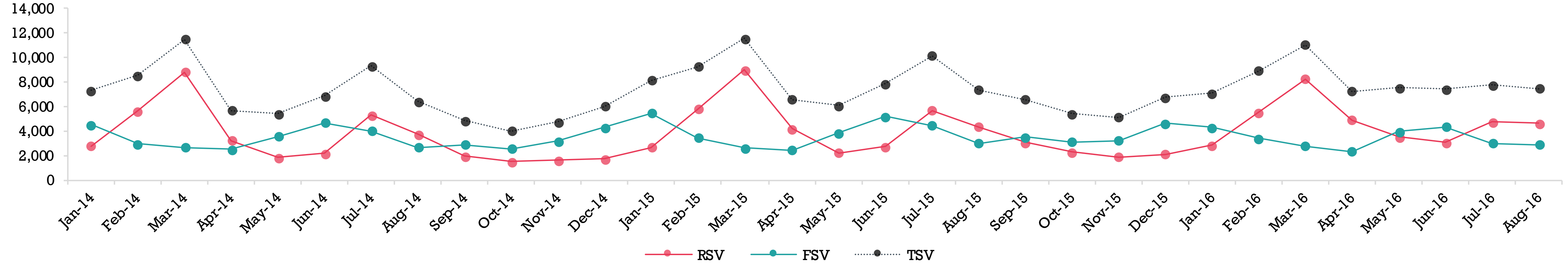
Trends by market

Overall:

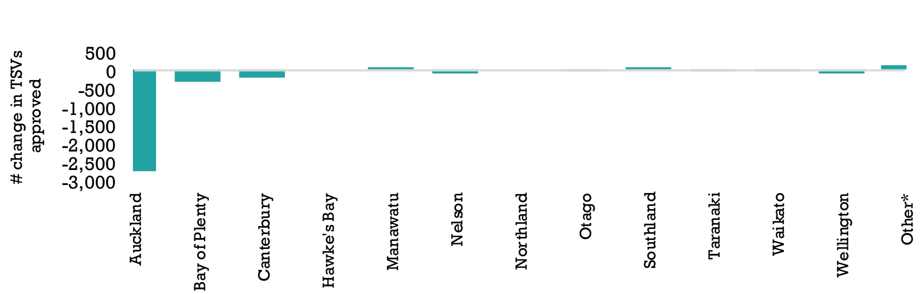
November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
127	7%	-248	-8%	-121	-2%	1,963	4%	-5,225	-13%	-3,262	-4%

YTD (November)

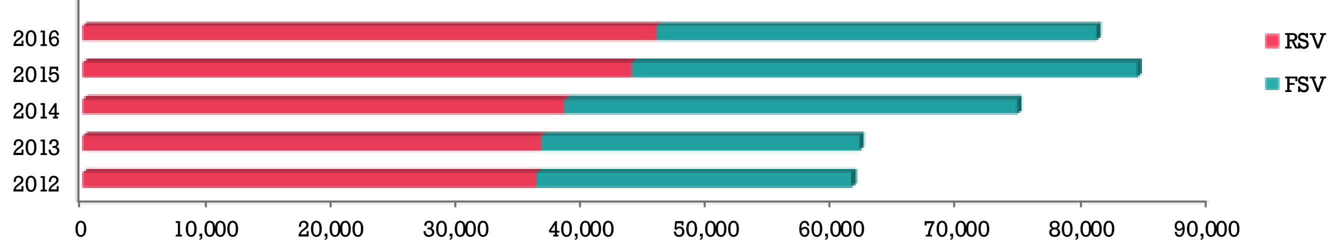
Overall: student visas approved 2014-2016



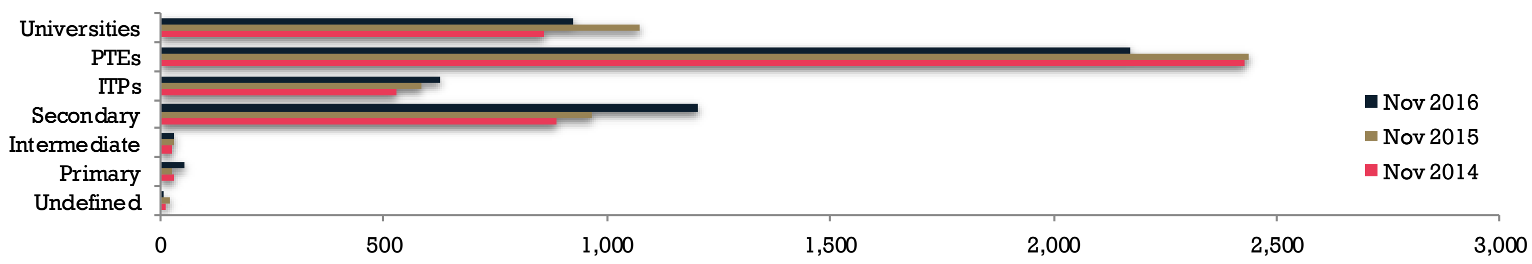
Overall: 2016 YTD TSV regional change



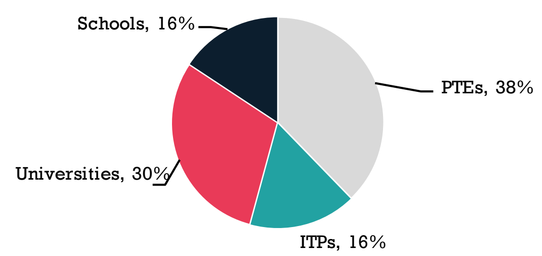
Overall: Cumulative total for RSV vs. FSV, 2012-2016



Overall: Total student visas approved by sector, November



Overall: 2016 YTD Sector breakdown of TSV



Key takeaways:

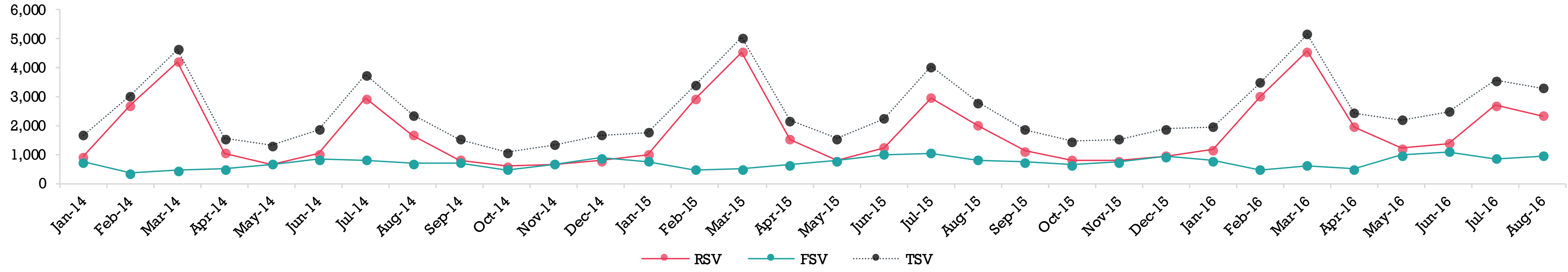
- Current YTD figures show that total student visas (TSV) are flat (-4%) and first time student visas (FSV) are down 13%. November 2016 experienced a -2% decrease for TSV (-121) which was driven by an 8% increase in FSV (-248), compared to November 2015.

China:

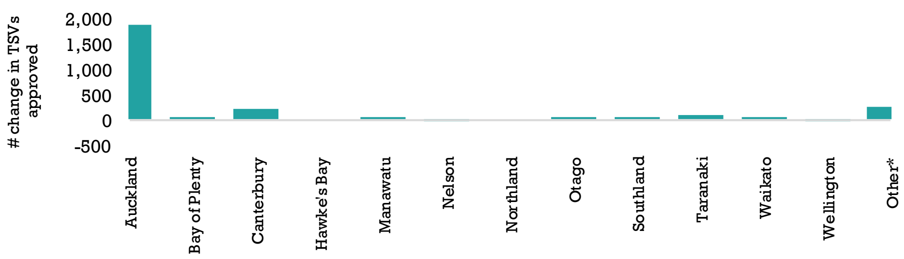
YTD (November)

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
161 ↑	20%	63 ↑	9%	224 ↑	15%	2,006 ↑	10%	534 ↑	7%	2,540 ↑	9%

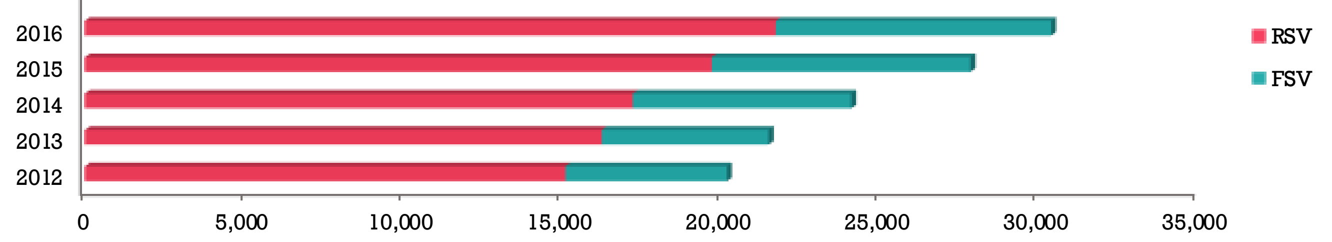
China: student visas approved 2014-2016



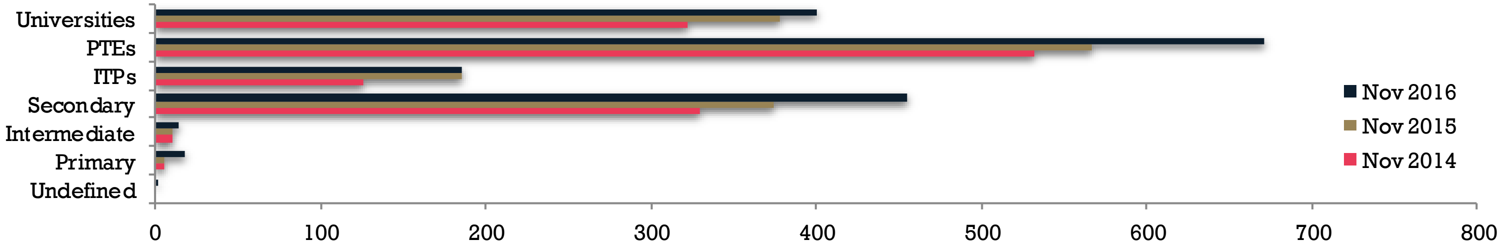
China: 2016 YTD TSV regional change



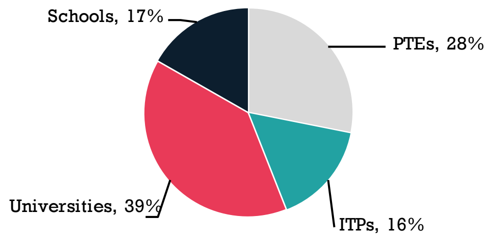
China: Cumulative total for RSV vs. FSV, 2012-2016



China: Total student visas approved by sector, November



China: 2016 YTD Sector breakdown of TSV



Key takeaways:

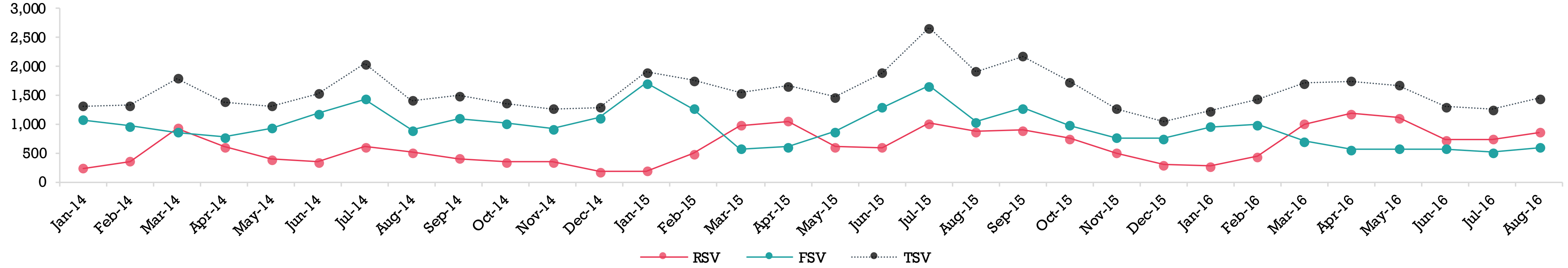
- TSV approved for China has increased by 9% YTD (+2,540). This is being driven by an 10% increase in RSV (+2,006) as well as growth in the number of FSV (+7%, +534).
- This increase has been concentrated across all sectors, and has mostly been concentrated in the Auckland region.

India:

YTD (November)

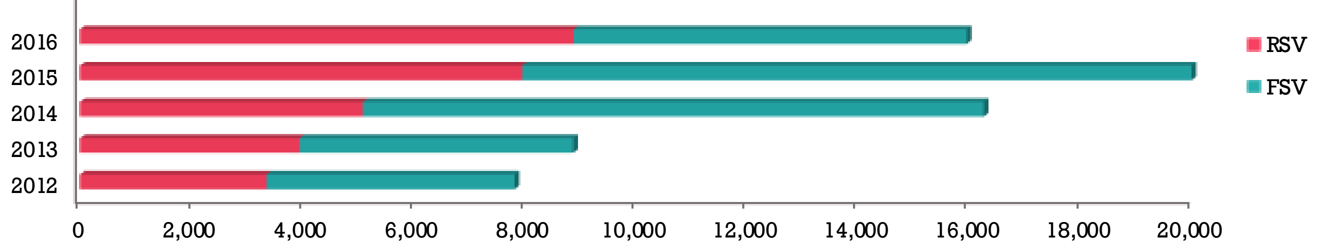
November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
-59 ⇩ -12%	-318 ⇩ -41%	-377 ⇩ -30%	930 ⇧ 12%	-4,974 ⇩ -41%	-4,044 ⇩ -20%

India: student visas approved 2014-2016

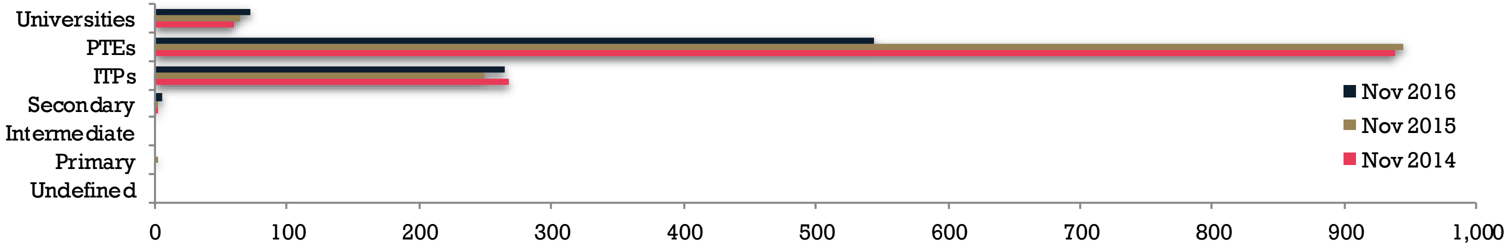


India: 2016 YTD TSV regional change

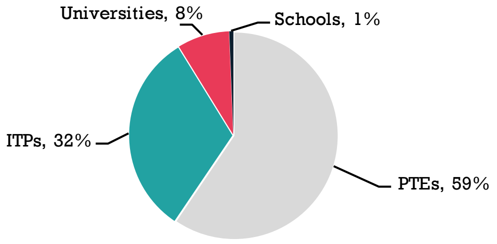
India: Cumulative total for RSV vs. FSV, 2012-2016



India: Total student visas approved by sector, November



India: 2016 YTD Sector breakdown of TSV



Key takeaways:

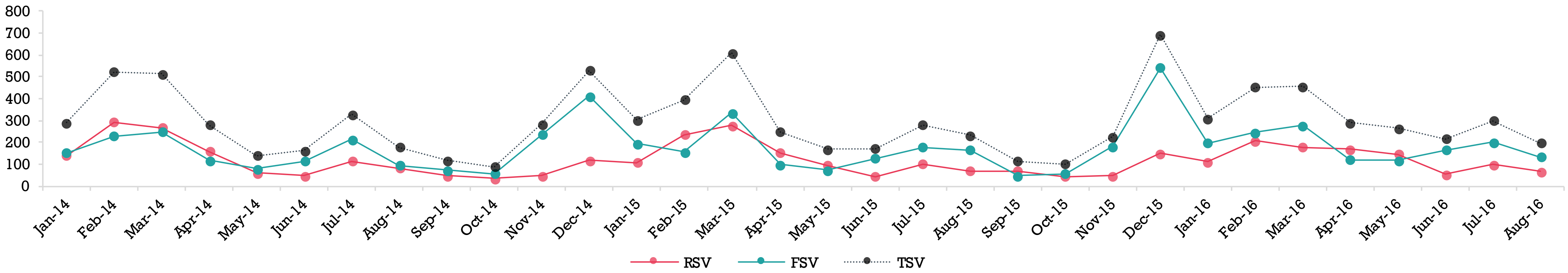
- YTD results for India continue to be much lower than the same period last year, with TSV down 20% (-4,044). This is being driven by an 41% decline in FSV to date, following the change in English language requirements (Rule 18) in 2015 (-4,974). However India is seeing an increase in RSV (+12%, +930) suggesting students are choosing to return/remain in NZ to study.

Japan:

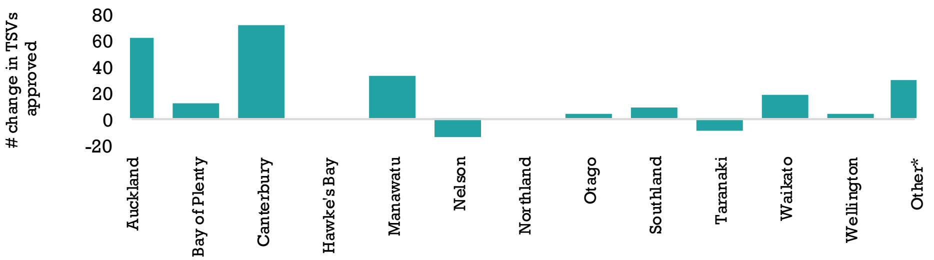
YTD (November)

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
7 ↑ 15%	160 ↑ 89%	167 ↑ 74%	-74 ↓ -6%	289 ↑ 18%	215 ↑ 8%

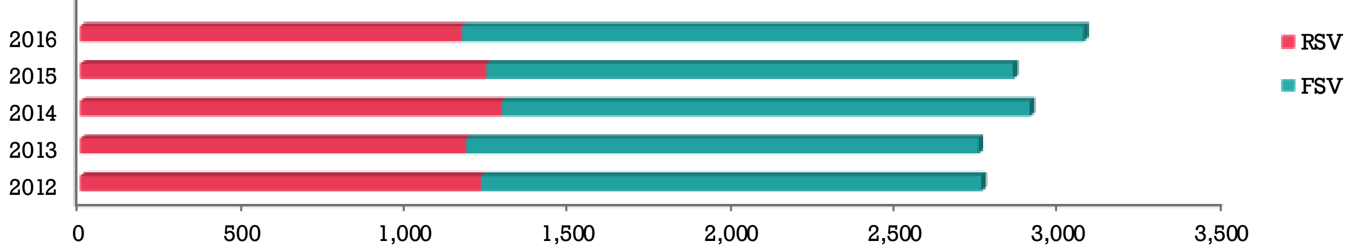
Japan: student visas approved 2014-2016



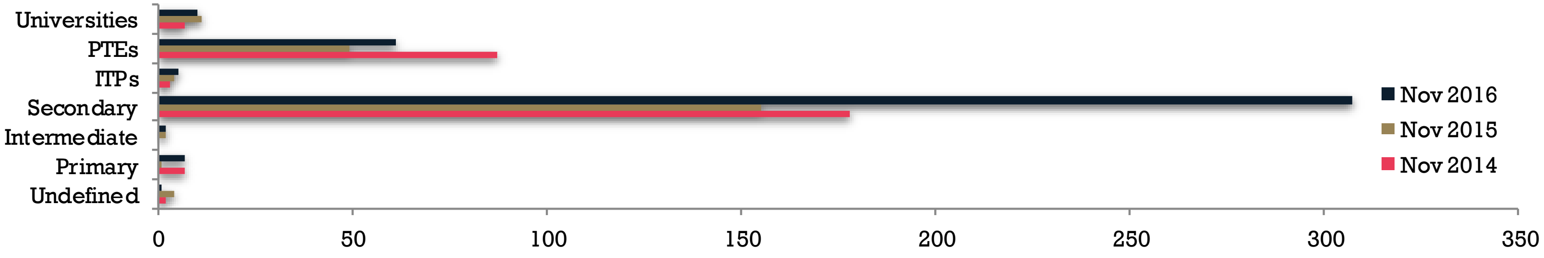
Japan: 2016 YTD TSV regional change



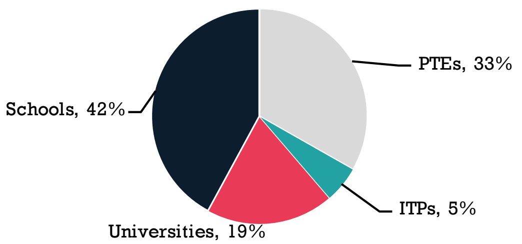
Japan: Cumulative total for RSV vs. FSV, 2012-2016



Japan: Total student visas approved by sector, November



Japan: 2016 YTD Sector breakdown of TSV



Key takeaways:

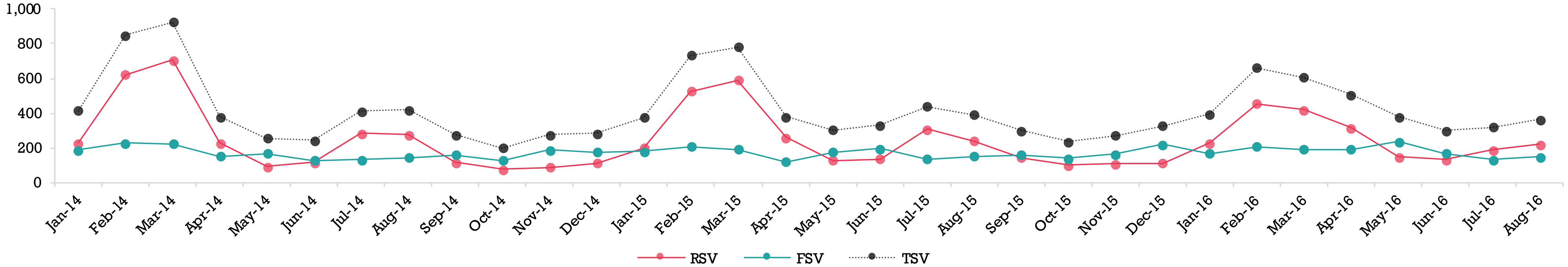
- Japan has seen an increase in FSV approved YTD (+18%, +289), however, the number of students choosing to remain/return to New Zealand to study has declined compared to 2015 YTD (-6%, -74).
- The schools and PTE sectors draw 75% of Japanese students to New Zealand.

Korea:

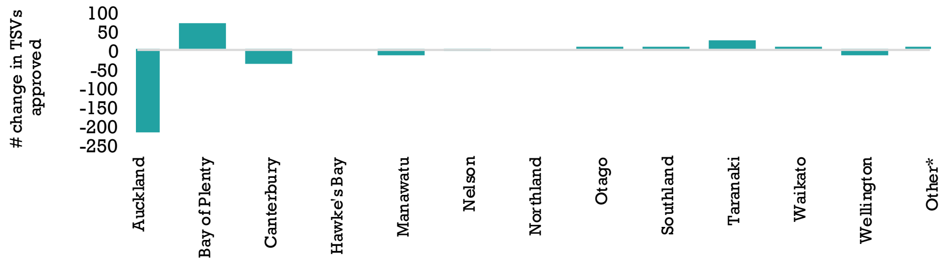
YTD (November)

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
-4 → -4%	47 ↑ 29%	43 ↑ 16%	-303 ↓ -11%	133 ↑ 7%	-170 → -4%

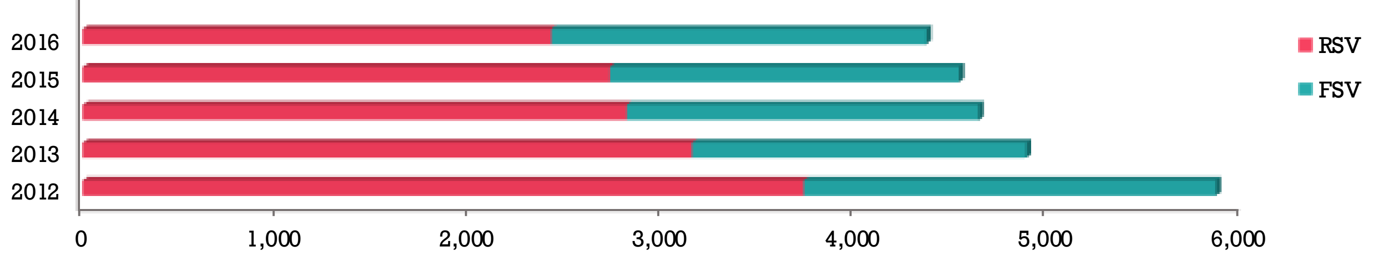
Korea: student visas approved 2014-2016



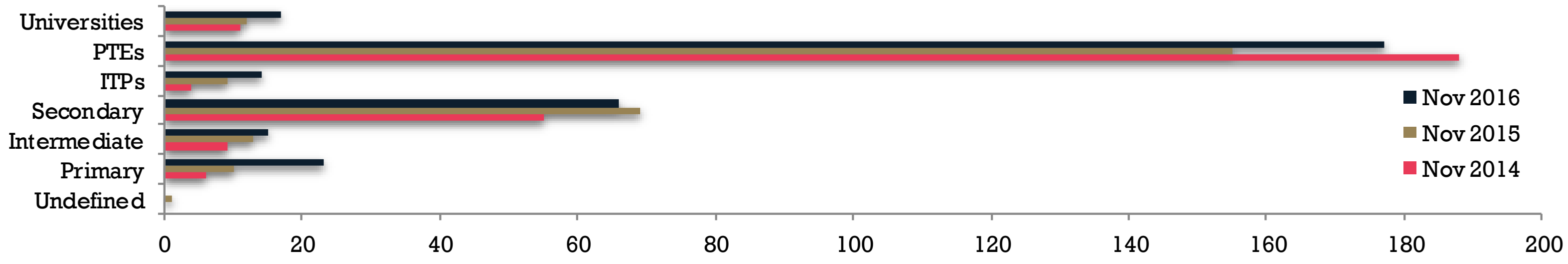
Korea: 2016 YTD TSV regional change



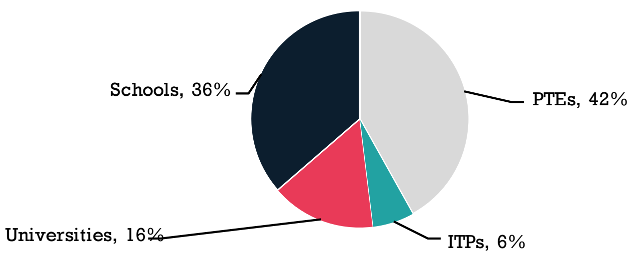
Korea: Cumulative total for RSV vs. FSV, 2012-2016



Korea: Total student visas approved by sector, November



Korea: 2016 YTD Sector breakdown of TSV



Key takeaways:

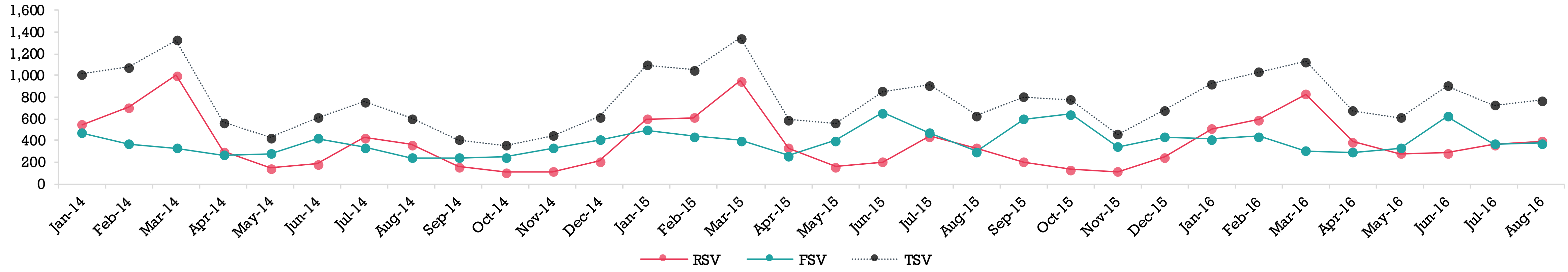
- It has been suggested that Korean students are less encouraged to study abroad in English-speaking countries due to changing (and uncertain) domestic university entrance policies.
- The number of total TSVs approved for Korea is stable YTD (-4%, -170). This decrease is driven by RSVs declining (-11%, -303), however, FSV for Korea have increased YTD (+7%, +133).

South East Asia

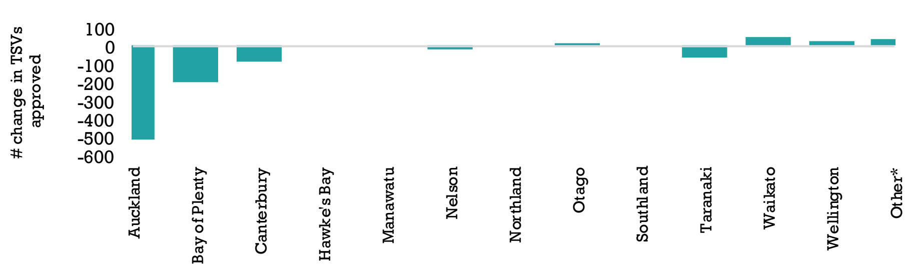
November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
52	45%	40	12%	92	20%	149	4%	-897	-18%	-748	-8%

YTD (November)

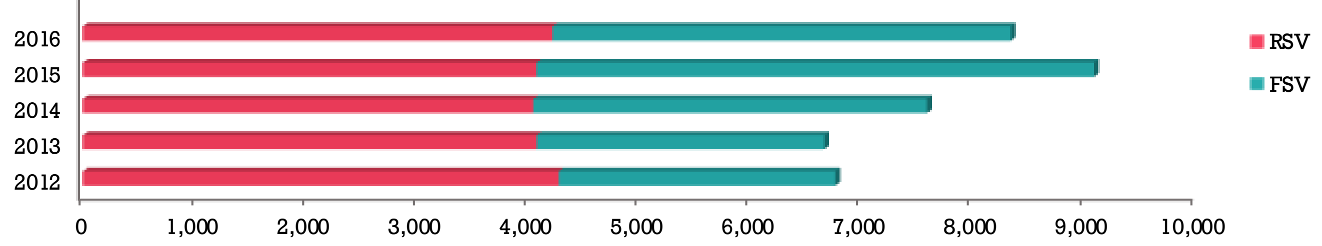
South East Asia: student visas approved 2014-2016



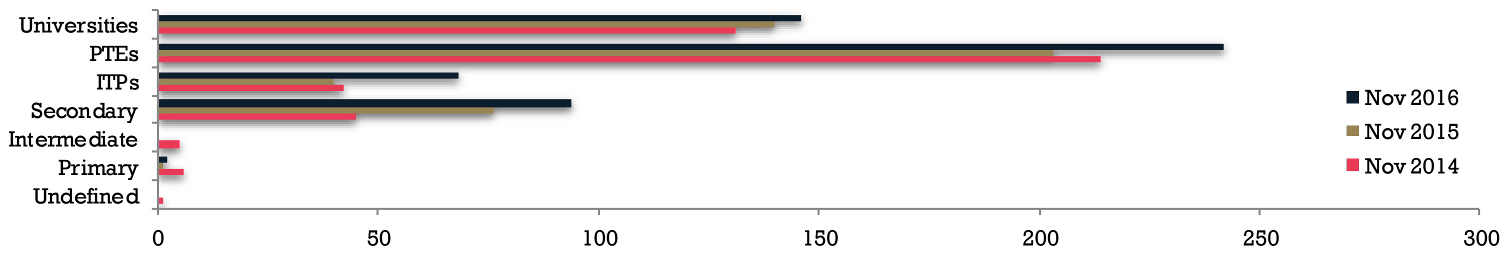
South East Asia: 2016 YTD TSV regional change



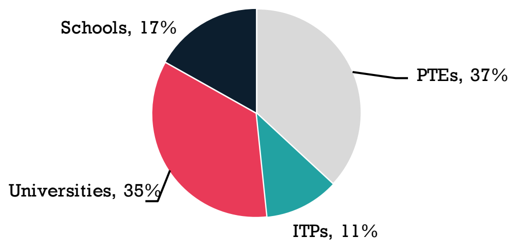
South East Asia: Cumulative total for RSV vs. FSV, 2012-2016



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



South East Asia: 2016 YTD Sector breakdown of TSV



Key takeaways:

- YTD results for the South East Asia region are down 8% (-748), being driven by FSV (-18%, -897). The markets driving this decline include Thailand (-8%) and the Philippines (-28%).
- So far this year, students from the South East Asia region are choosing to study within the university (37%), schools (17%) and PTE (37%) sectors.

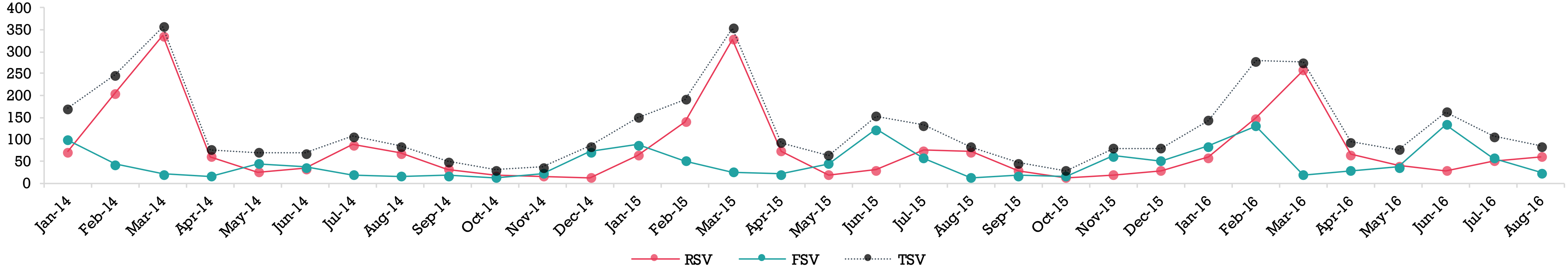
South East Asia includes: Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Viet Nam.

Malaysia:

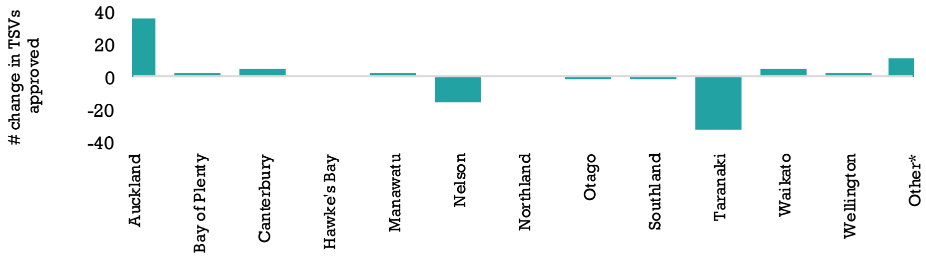
November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
2	11%	-8	-13%	-6	-8%	-84	-10%	96	19%	12	1%

YTD (November)

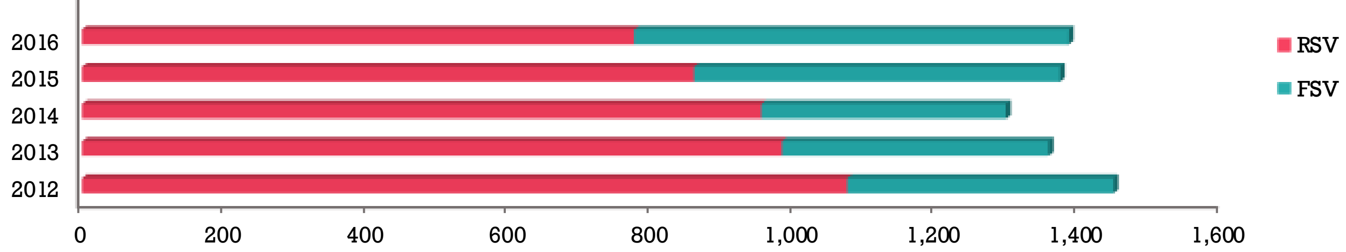
Malaysia: student visas approved 2014-2016



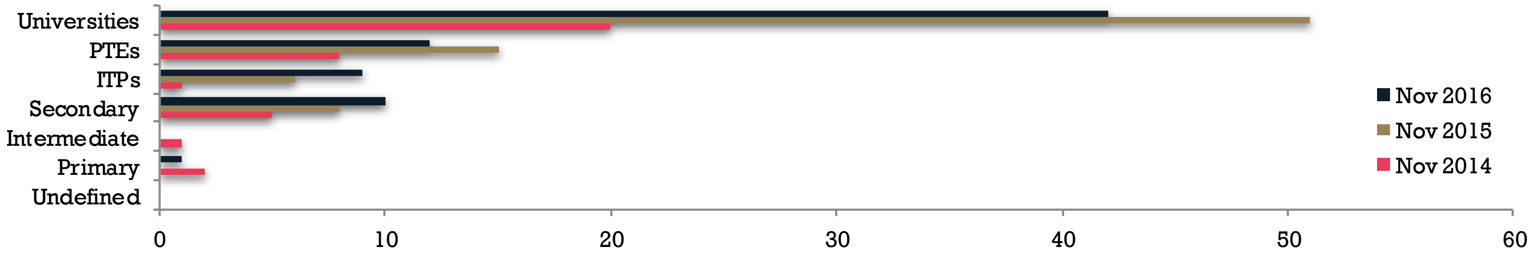
Malaysia: 2016 YTD TSV regional change



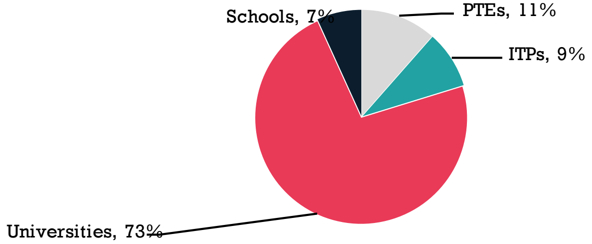
Malaysia: Cumulative total for RSV vs. FSV, 2012-2016



Malaysia: Total student visas approved by sector, November



Malaysia: 2016 YTD Sector breakdown of TSV



Key takeaways:

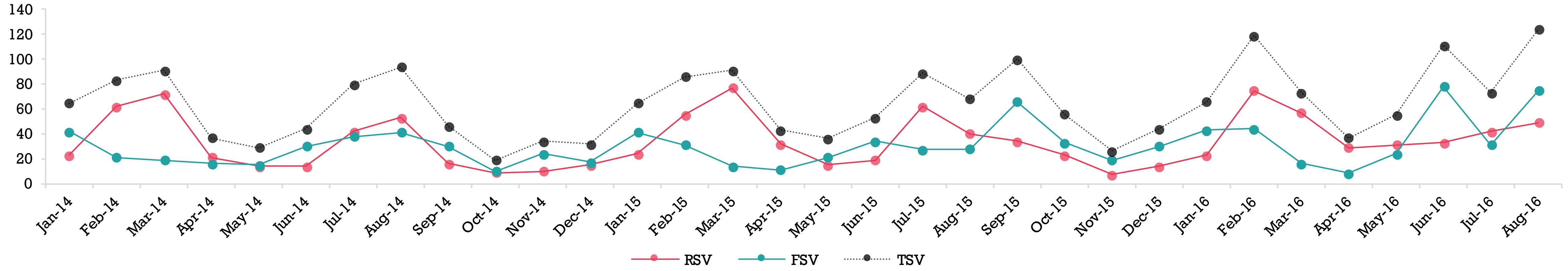
- TSV approved for Malaysia remains stable YTD. Although an increase was seen in FSV (+19%, +96), this was offset by a decline in RSV (-10%, -84).
- The university sector made up the majority of TSV approved YTD (73%).

Indonesia:

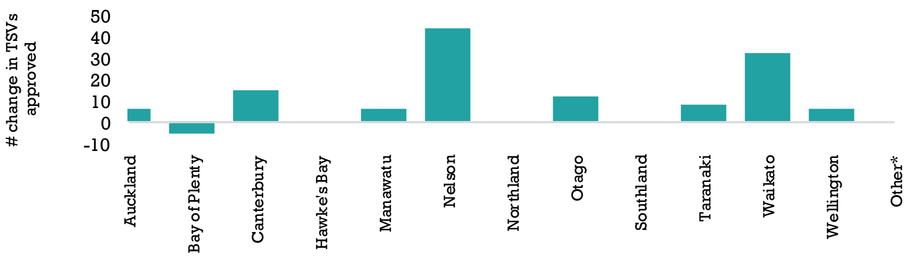
YTD (November)

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
10 ⇧ 143%	10 ⇧ 53%	20 ⇧ 77%	25 ⇧ 6%	98 ⇧ 30%	123 ⇧ 17%

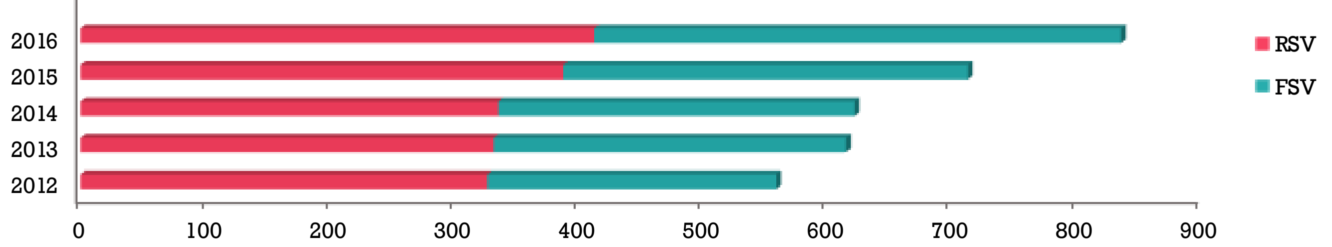
Indonesia: student visas approved 2014-2016



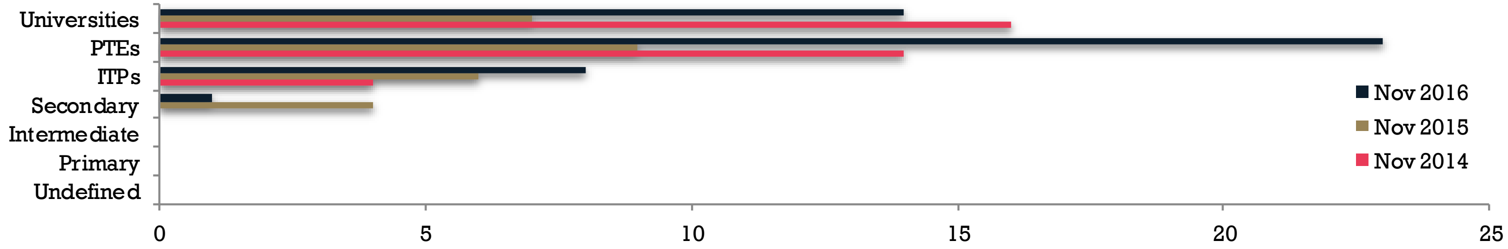
Indonesia: 2016 YTD TSV regional change



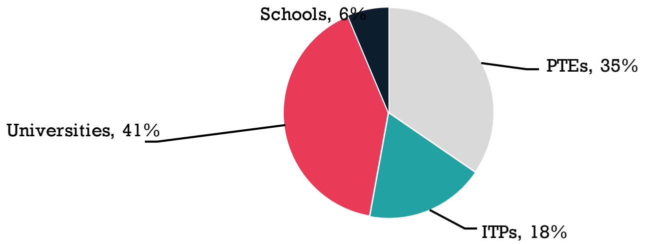
Indonesia: Cumulative total for RSV vs. FSV, 2012-2016



Indonesia: Total student visas approved by sector, November



Indonesia: 2016 YTD Sector breakdown of TSV



Key takeaways:

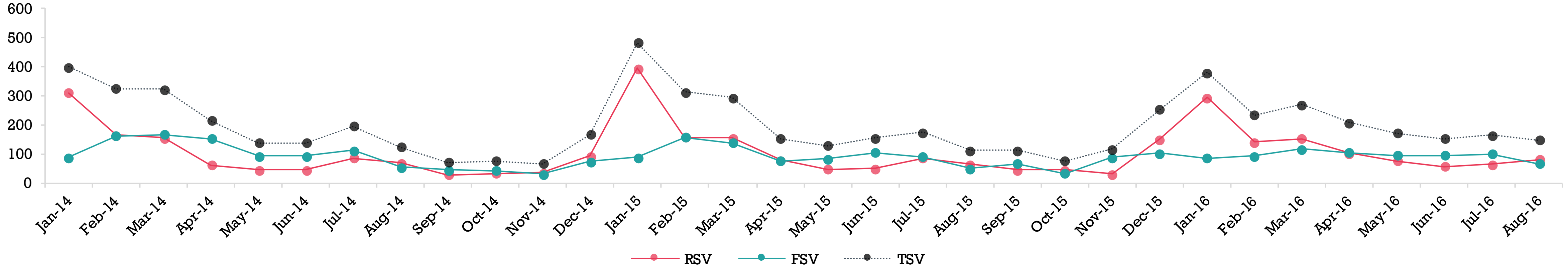
- Results for Indonesia are positive YTD, with TSV up 17% (+123).
- This is being driven by both FSV (+30%) and RSV (+6%).

Thailand:

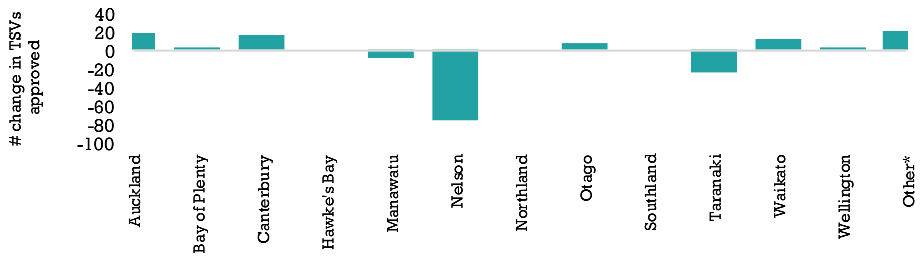
YTD (November)

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
12 ⇧ 39%	1 ⇨ 1%	13 ⇧ 11%	-35 ⇨ -3%	10 ⇨ 1%	-25 ⇨ -1%

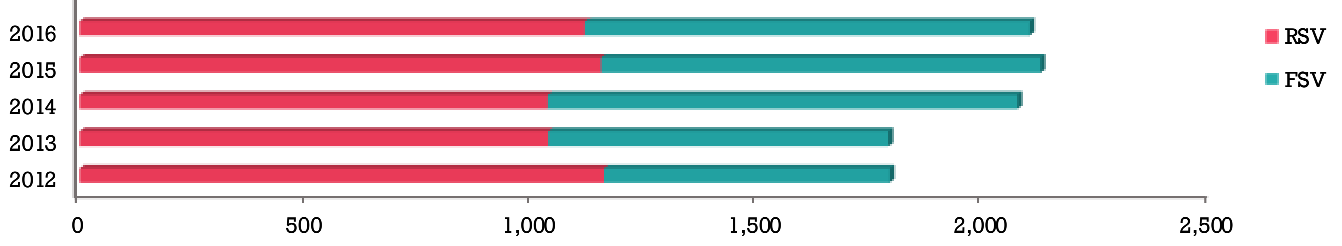
Thailand: student visas approved 2014-2016



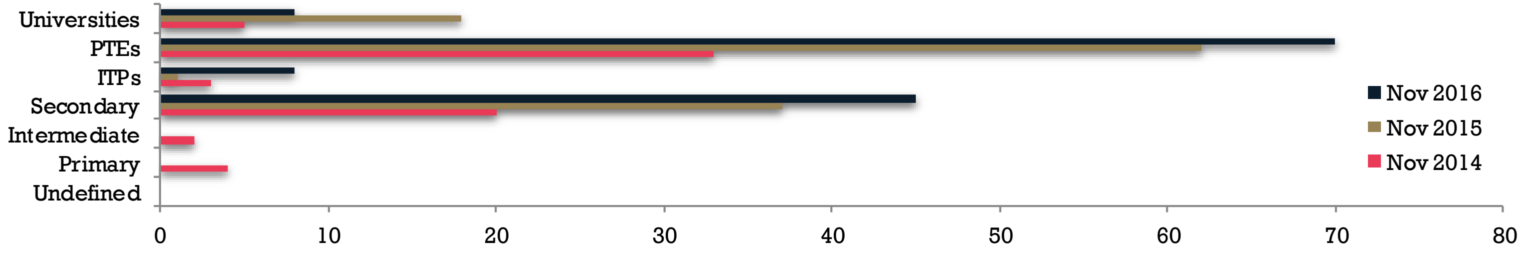
Thailand: 2016 YTD TSV regional change



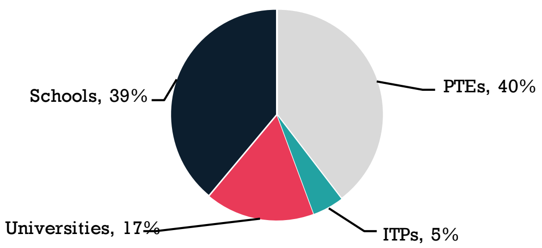
Thailand: Cumulative total for RSV vs. FSV, 2012-2016



Thailand: Total student visas approved by sector, November



Thailand: 2016 YTD Sector breakdown of TSV



Key takeaways:

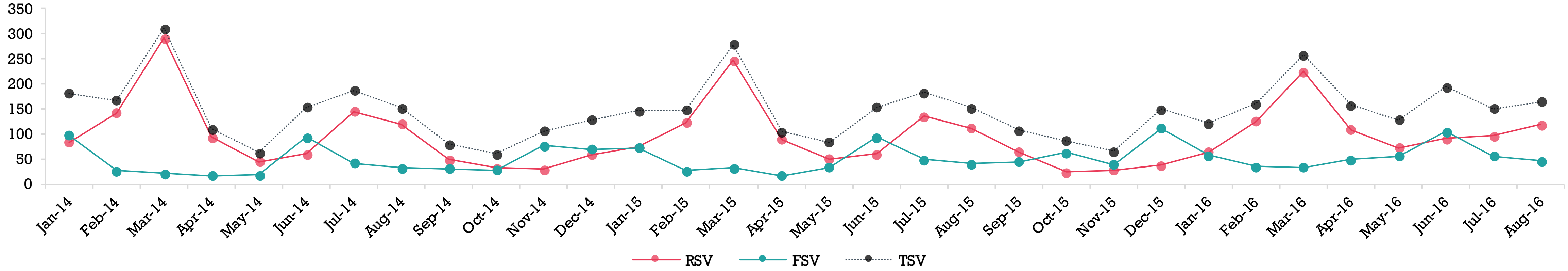
- TSV YTD results are flat (TSV down -1%, -25) being driven by a reduction in both RSV(-3%, -35) and FSV (-1%, -10).
- The schools sector make up the majority of TSV approved YTD (39%), followed by the PTE sector with 40%.

Viet Nam:

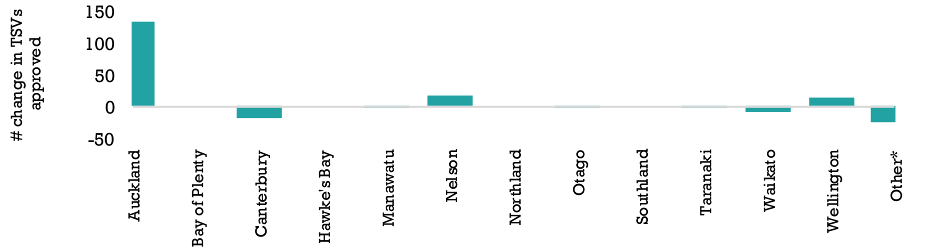
YTD (November)

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
8 ↑ 30%	5 ↑ 13%	13 ↑ 20%	54 ↑ 5%	48 ↑ 9%	102 ↑ 7%

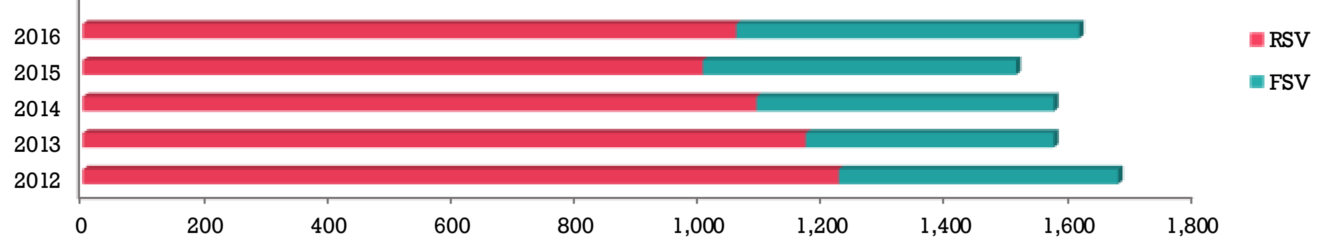
Viet Nam: student visas approved 2014-2016



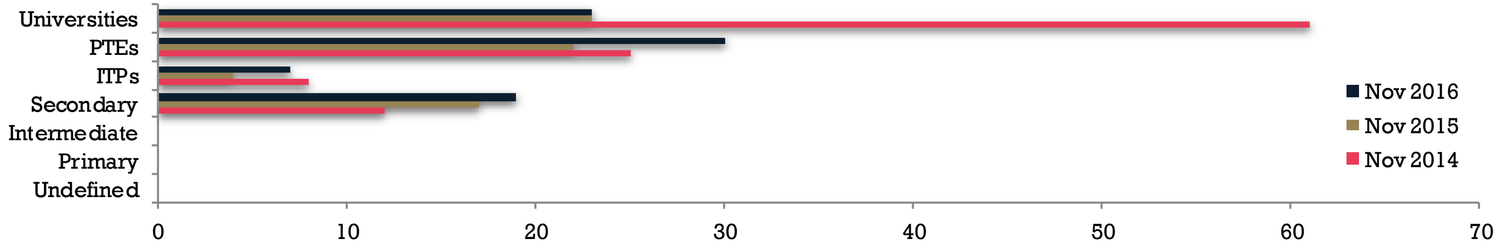
Viet Nam: 2016 YTD TSV regional change



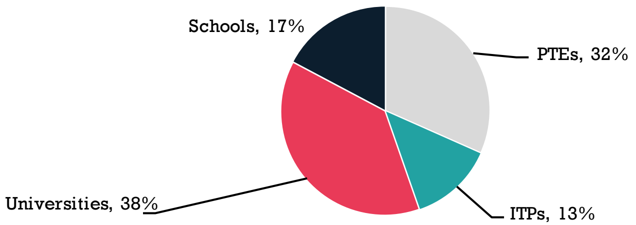
Viet Nam: Cumulative total for RSV vs. FSV, 2012-2016



Viet Nam: Total student visas approved by sector, November



Viet Nam: 2016 YTD Sector breakdown of TSV



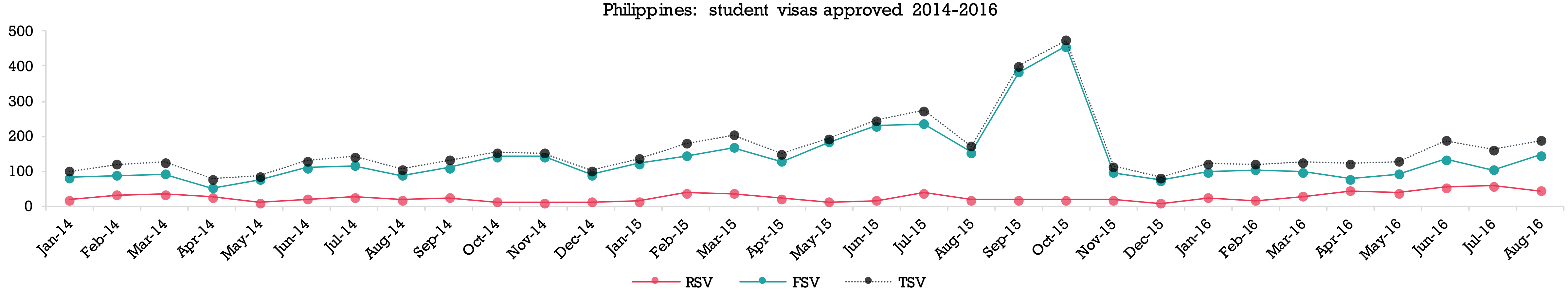
Key takeaways:

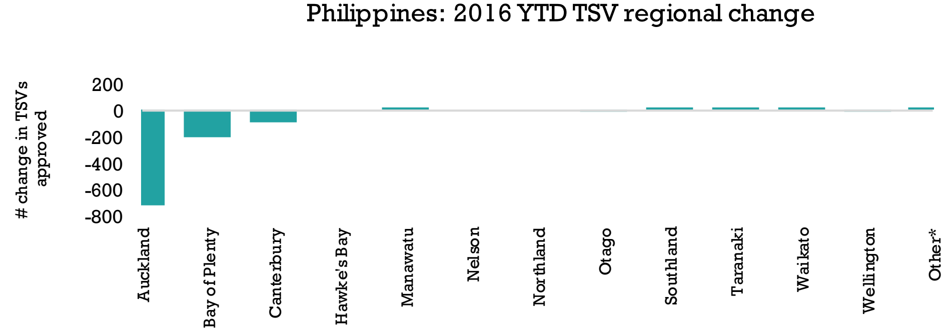
- Viet Nam is tracking well YTD with FSV (+9%, +48) and RSV (+5%, +54).
- 38% of TSV approved were in the university sector and 32% in the PTE sector.

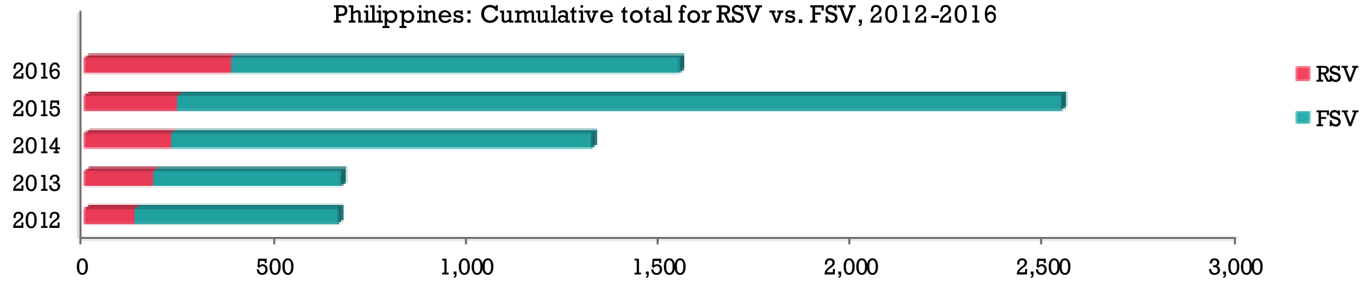
Philippines:

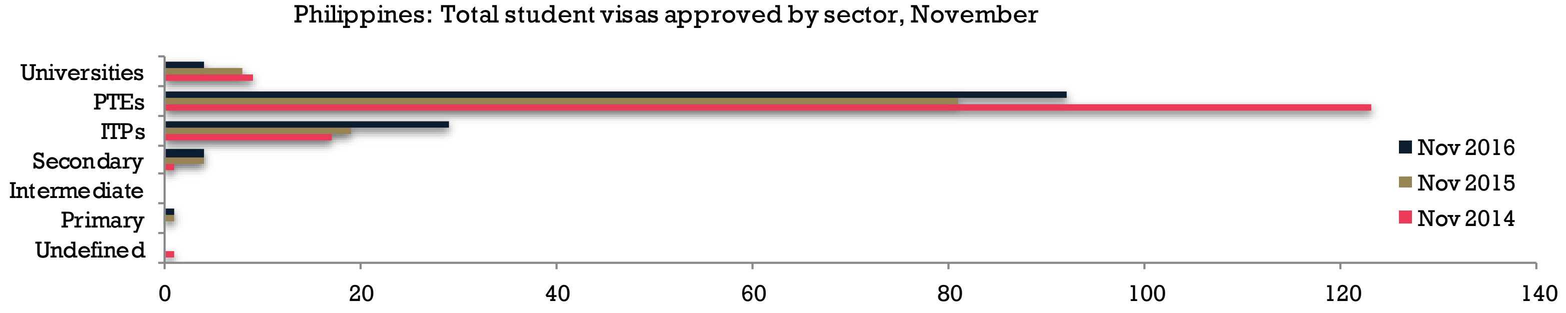
YTD (November)

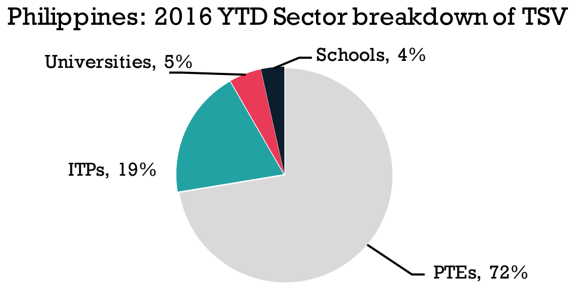
November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
10 ↑ 56%	7 ↑ 7%	17 ↑ 15%	140 ↑ 58%	-1,132 ↓ -49%	-992 ↓ -39%











Key takeaways:

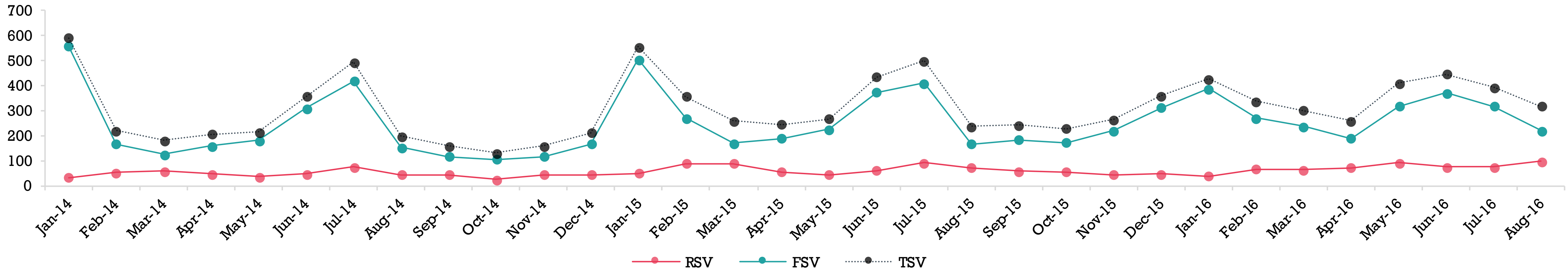
- FSV approved from the Philippines remain down YTD (-49%, -1,132), further driving down TSV (-39%, -992). This decline follows an exceptional year of growth that would be hard to match. The change in English language requirements (Rule 18) that took place in 2015 has had an immediate effect on the number 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. 96% of TSV approved were in the tertiary sector.

Latin America:

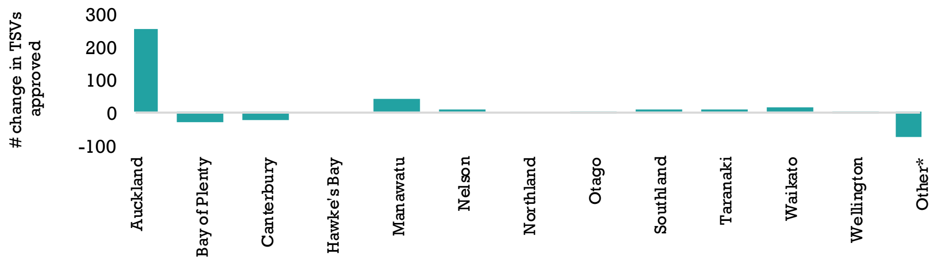
YTD (November)

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
16	36%	-52	-24%	-36	-14%	119	17%	52	2%	171	5%

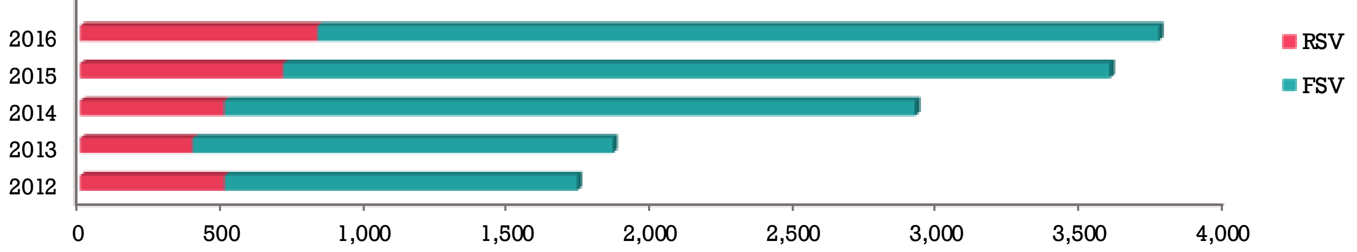
Latin America: student visas approved 2014-2016



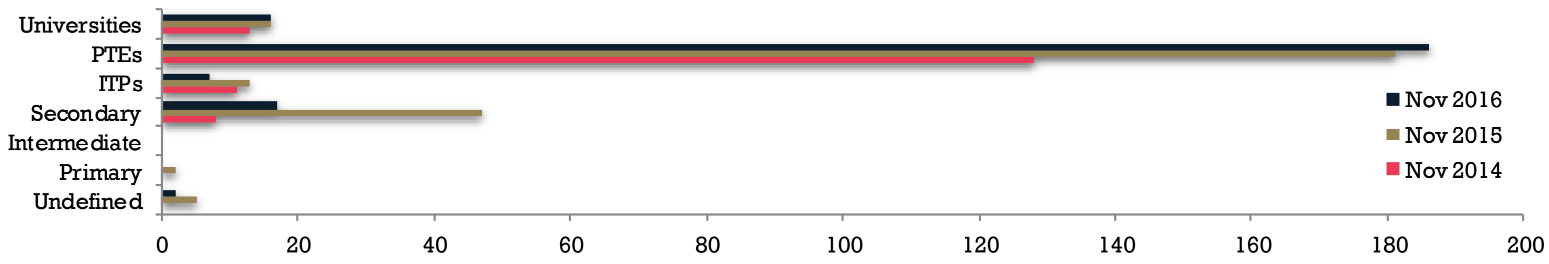
Latin America: 2016 YTD TSV regional change



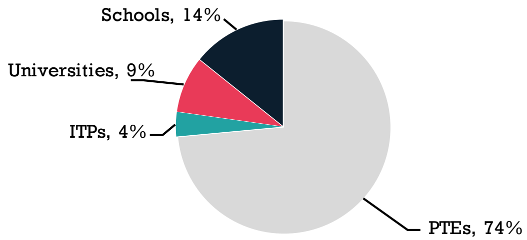
Latin America: Cumulative total for RSV vs. FSV, 2012-2016



Latin America: Total student visas approved by sector, November



Latin America: 2016 YTD Sector breakdown of TSV



Key takeaways:

- The Latin America region has is increasing YTD (+5%, +171), which is being driven by RSV (+17%, +119). FSV remain flat for this region (+2%, +52)
- The PTE sector accounts for the majority of TSV approved YTD (74%), followed by the schools sector with 14%.

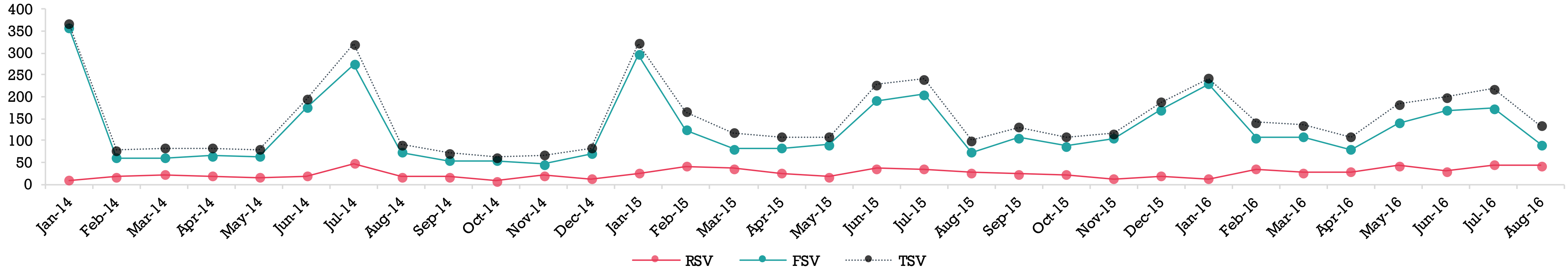
Latin America includes: Argentina, Bolivia, Brazil Chile, Colombia, Ecuador, El Salvador, Guatemala, Mexico, Nicaragua, Panama, Paraguay, Peru, Suriname, Trinidad and Tobago, Turks and Caicos Islands, Uruguay, Venezuela, Cuba, Honduras, St Lucia, Costa Rica, Dominican Republic, Belize, Dominica, St Vincent and the Grenadines, Guyana, Honduras

Brazil:

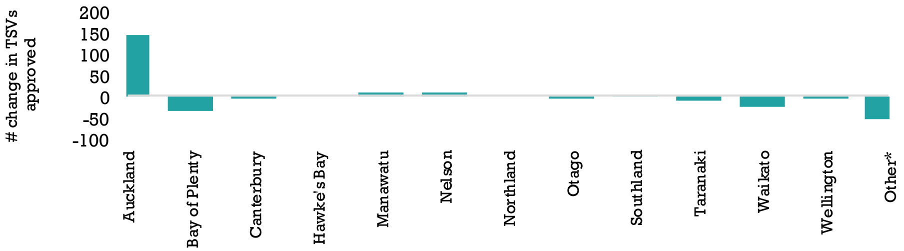
YTD (November)

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
17 ↑ 142%	-23 ↓ -22%	-6 ↓ -5%	77 ↑ 26%	-42 ⇨ -3%	35 ⇨ 2%

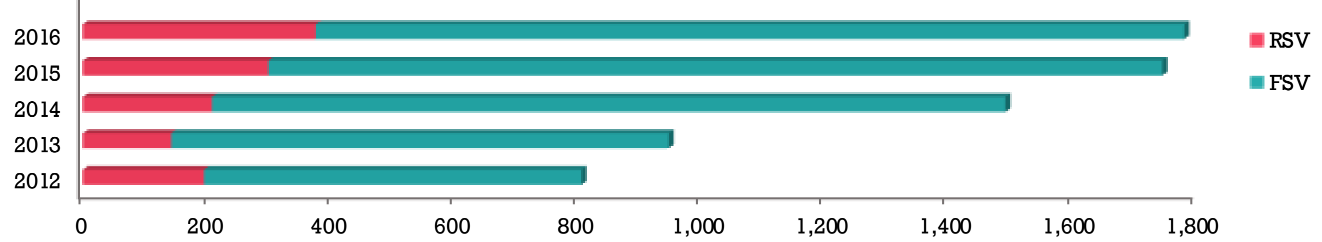
Brazil: student visas approved 2014-2016



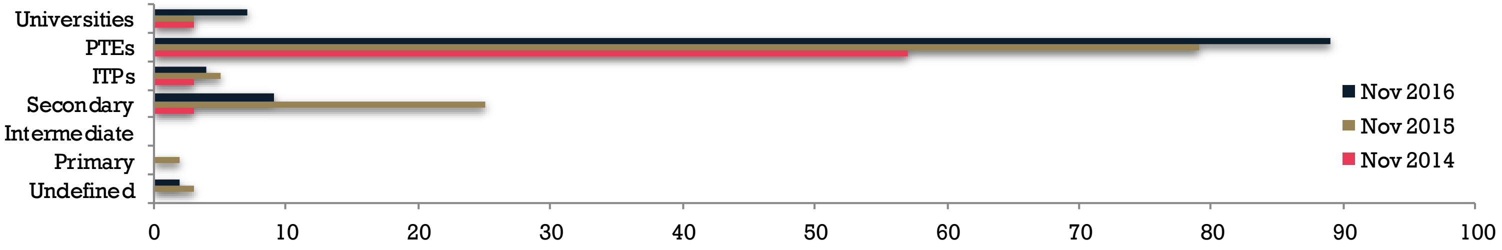
Brazil: 2016 YTD TSV regional change



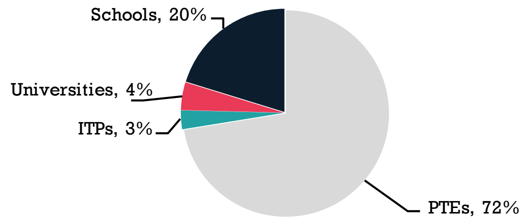
Brazil: Cumulative total for RSV vs. FSV, 2012-2016



Brazil: Total student visas approved by sector, November



Brazil: 2016 YTD Sector breakdown of TSV



Key takeaways :

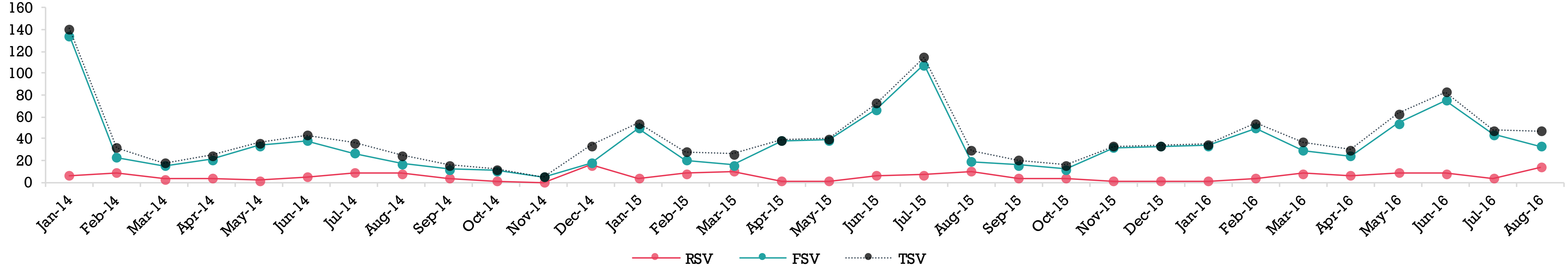
- Brazil results have stabilised YTD following a strong May which saw TSV up 2% (+35). The driver was RSV (+26%, +77) and the PTE sector and secondary schools benefited from this growth. FSV declined (-3%, -42).
- The Brazilian government-funded scholarship scheme 'Science Without Borders' (SWB) was 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.

Chile:

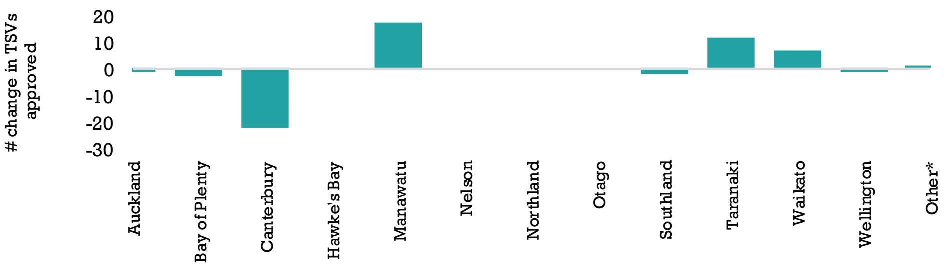
YTD (November)

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
1 ⇧	100%	-16 ⇩	-50%	-15 ⇩	-45%	14 ⇧	25%	-6 ⇨	-1%	8 ⇨	2%

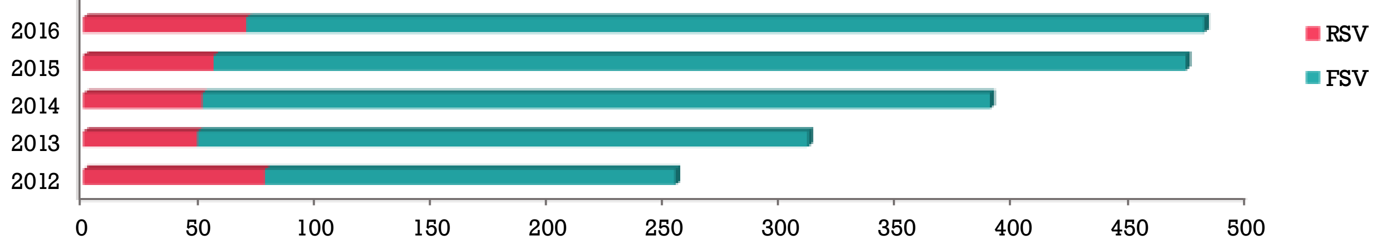
Chile: student visas approved 2014-2016



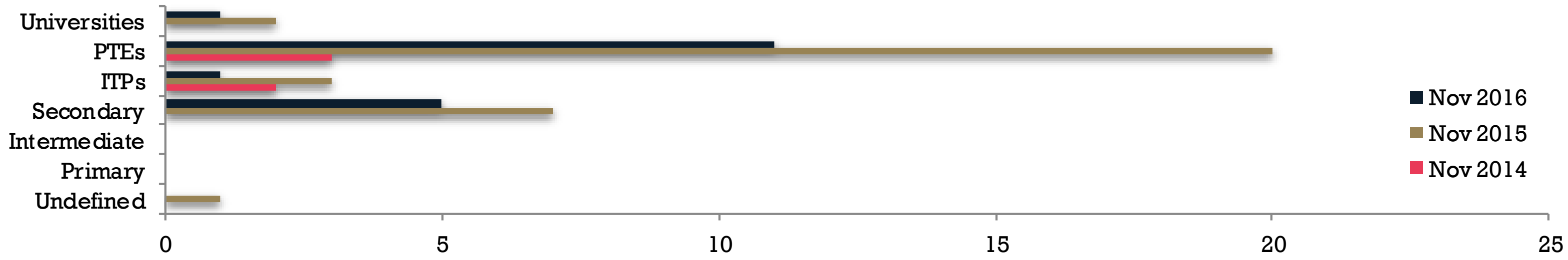
Chile: 2016 YTD TSV regional change



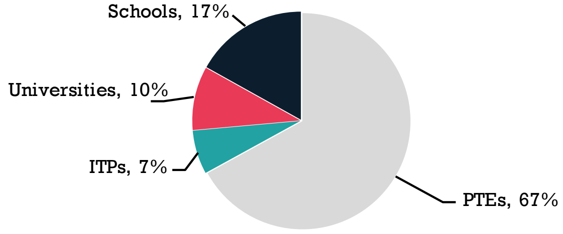
Chile: Cumulative total for RSV vs. FSV, 2012-2016



Chile: Total student visas approved by sector, November



Chile: 2016 YTD Sector breakdown of TSV



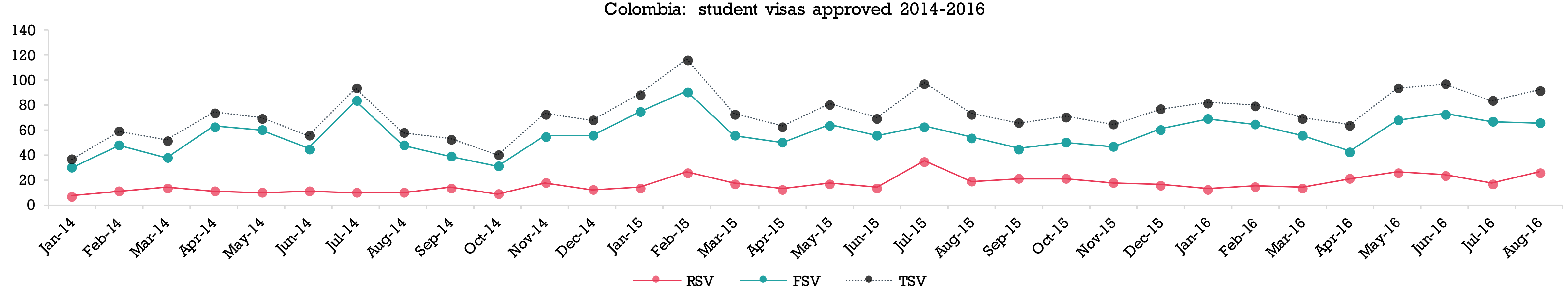
Key takeaways:

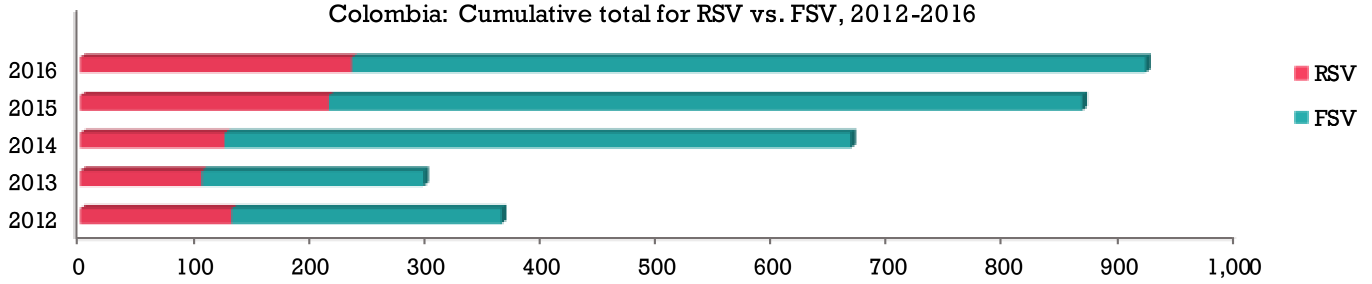
- The Chilean market is stable (+2%, +8). Students from Chile are also choosing to remain in New Zealand to study, with RSV up 25% (+14) YTD. However, FSV have declined slightly YTD (-1%, -6).
- Sixty seven percent of Chilean students are choosing to study at PTEs so far this year.

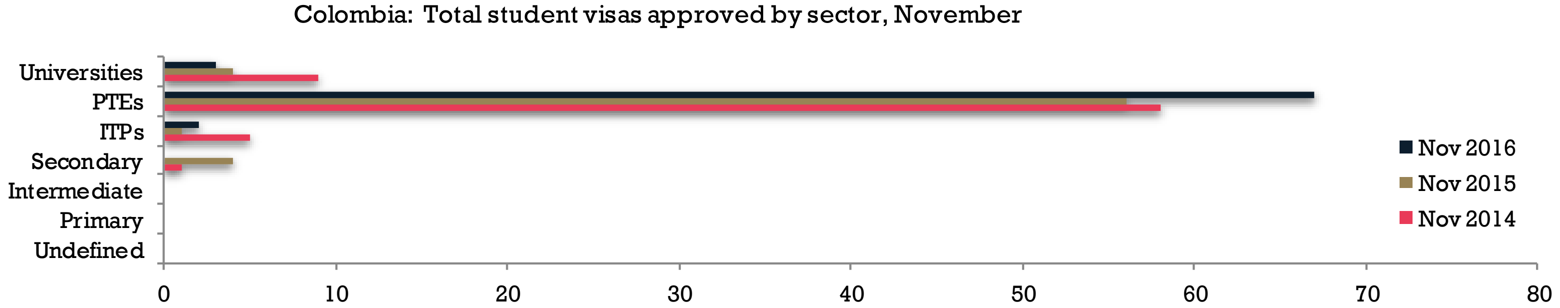
Colombia:

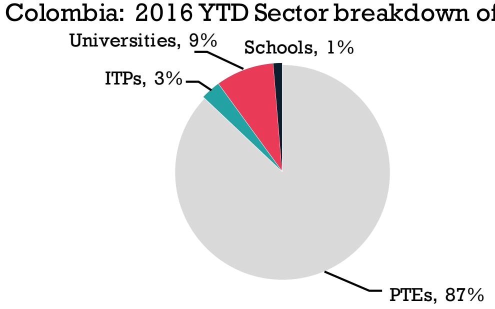
YTD (November)

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
0	0%	7	15%	7	11%	20	9%	35	5%	55	6%









Key takeaways:

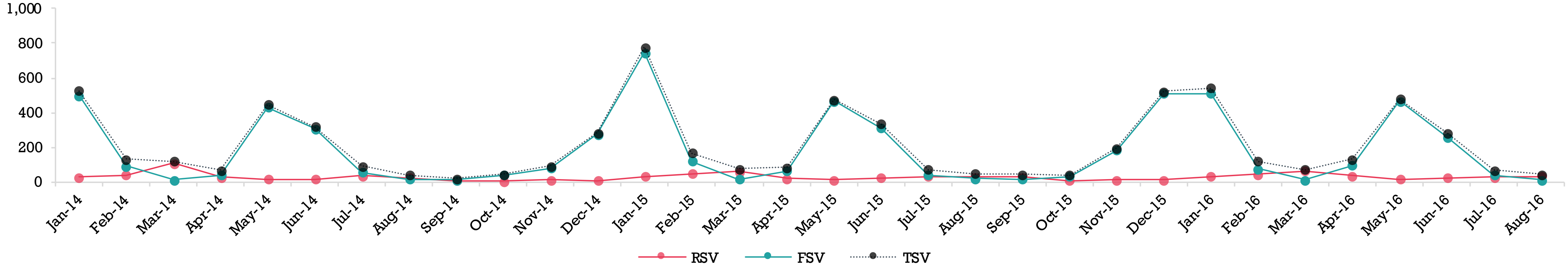
- Results for Colombia YTD are an increase in TSV (+6%, +55) with both FSV (+5%, 35%) and RSV (+9%, +20)
- Most Colombian students study in PTEs (87%).

USA:

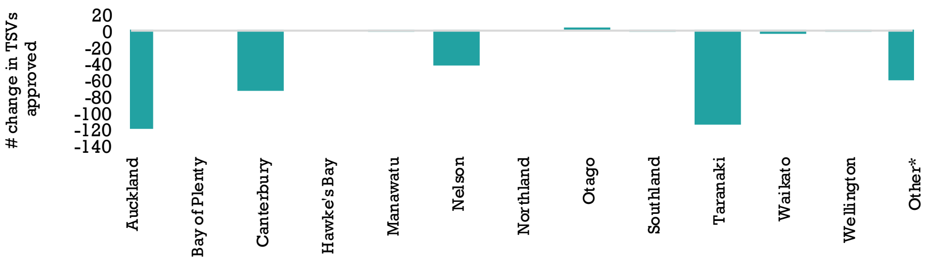
November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
-4	-36%	-117	-64%	-121	-63%	19	7%	-440	-22%	-421	-18%

YTD (November)

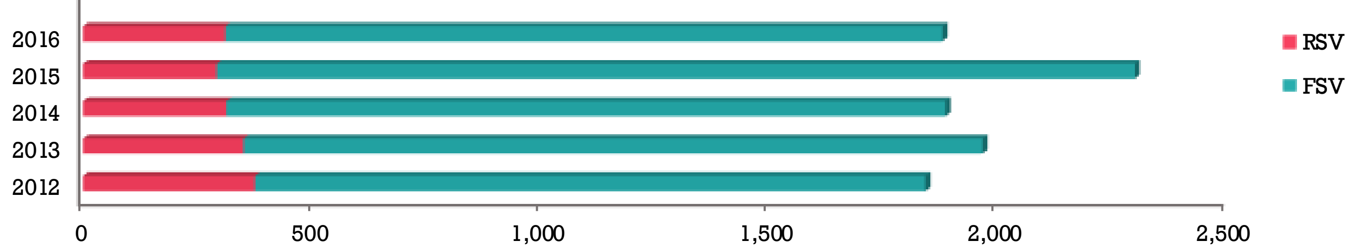
USA: student visas approved 2014-2016



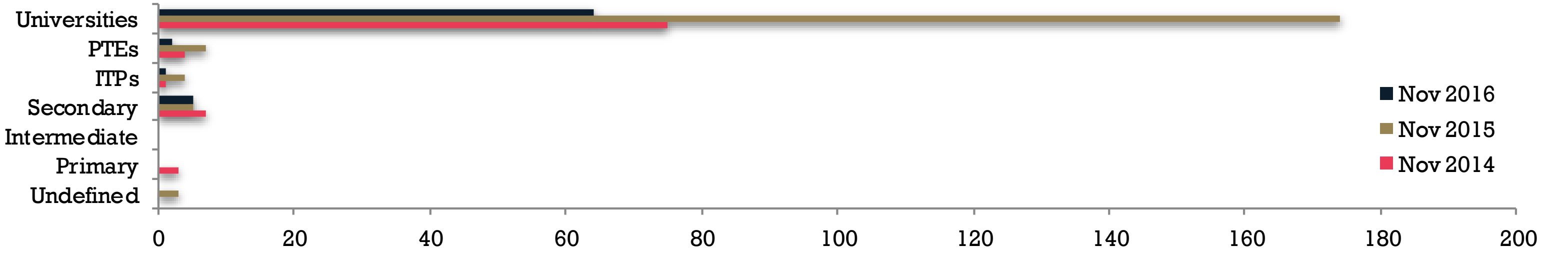
USA: 2016 YTD TSV regional change



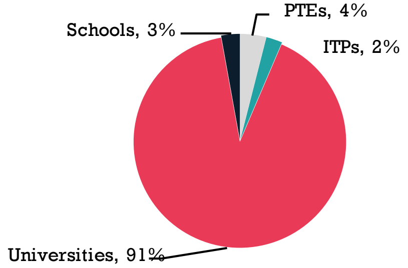
USA: Cumulative total for RSV vs. FSV, 2012-2016



USA: Total student visas approved by sector, November



USA: 2016 YTD Sector breakdown of TSV



Key takeaways:

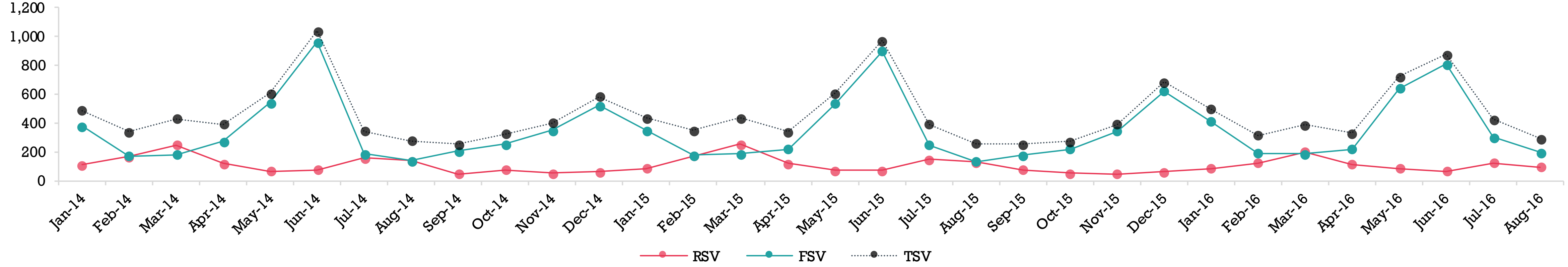
- While USA TSV appear to be much lower than normal YTD (-15%, -237), this is not reflective of the market. There was an 82% increase in the last quarter of 2015, where visas typically approved in the first quarter of 2016, were approved earlier.
- After a strong April, May 2016 results are stable compared to May 2015.
- The university sector makes up the majority of TSV approved for USA (94%).

Europe:

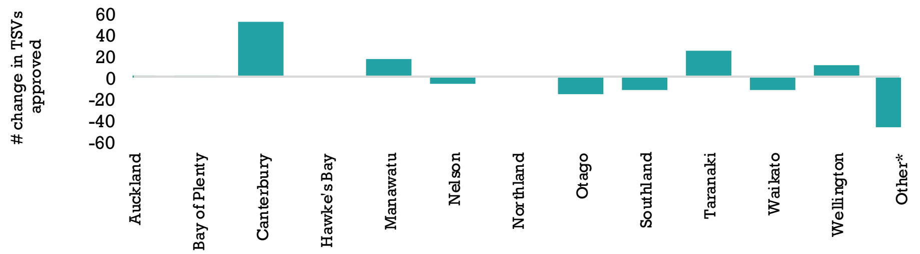
YTD (November)

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
18 38%	-22 -6%	-4 -1%	-128 -11%	138 4%	10 0%

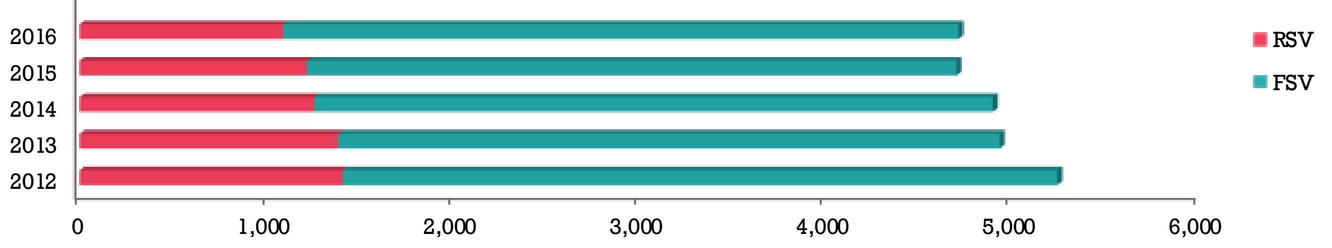
Europe: student visas approved 2014-2016



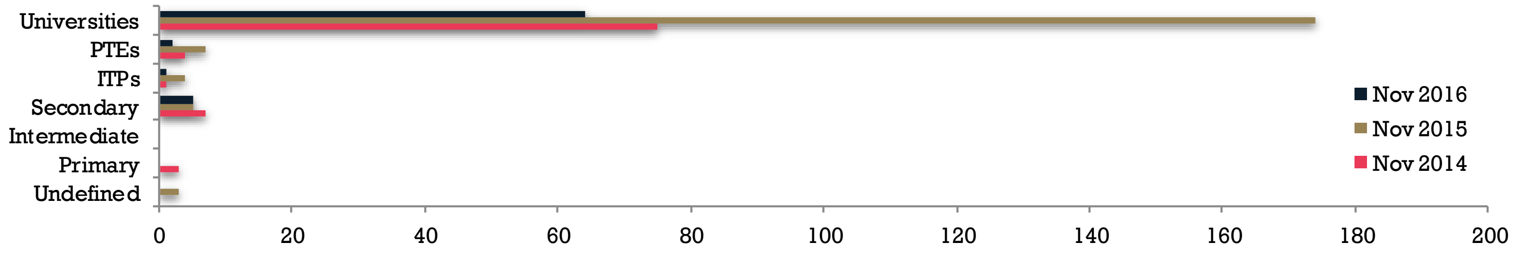
Europe: 2016 YTD TSV regional change



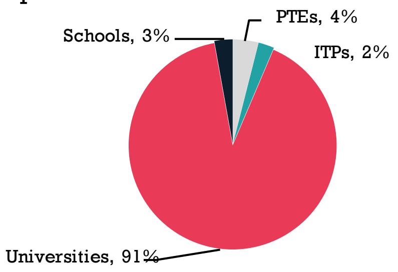
Europe: Cumulative total for RSV vs. FSV, 2012-2016



Europe: Total student visas approved by sector, November



Europe: 2016 YTD Sector breakdown of TSV



Key takeaways:

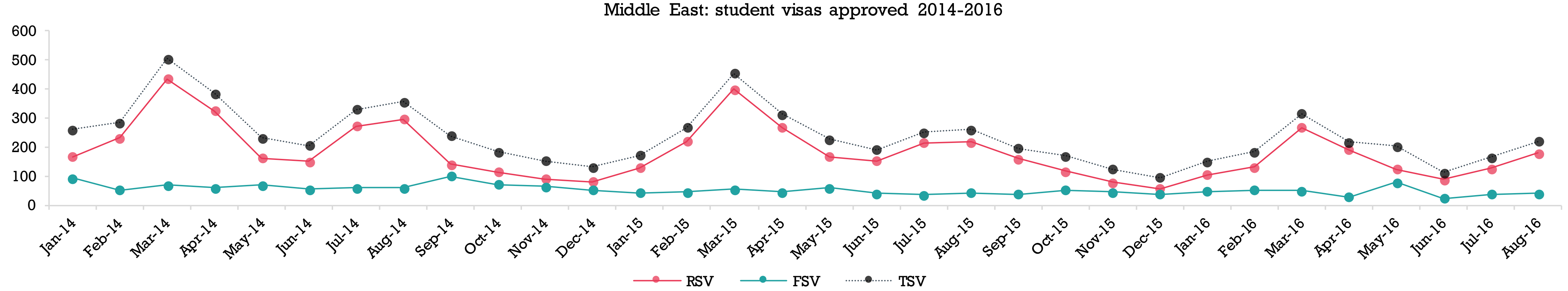
- Europe TSVs are table, FSV, up 12% YTD (+181). However, this is being offset by a decline in RSV, down 13% (-94) compared to the same period last year.
- The increase in the number of FSV approved YTD is being driven by Germany (+63), Switzerland (+45), and Spain (+30).

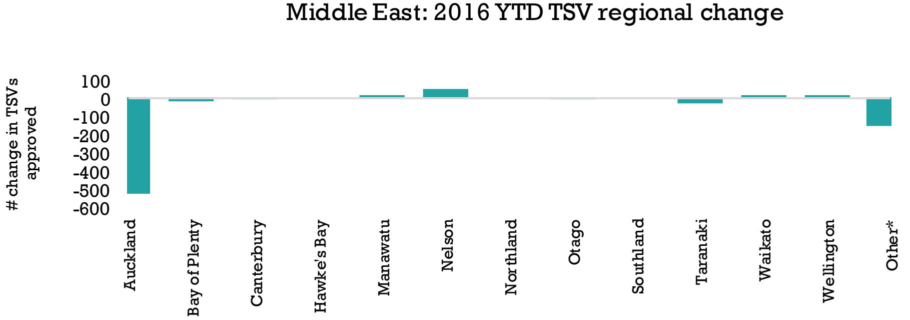
Europe includes: Austria, Belarus, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, UK, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Macedonia, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Serbia & Montenegro, Slovakia, Spain, Sweden, Switzerland, Turkey, Ukraine, Yugoslavia, Kosovo, Armenia, Bosnia and Herzegovina, Albania, Andorra, Cyprus, Slovenia, Monaco.

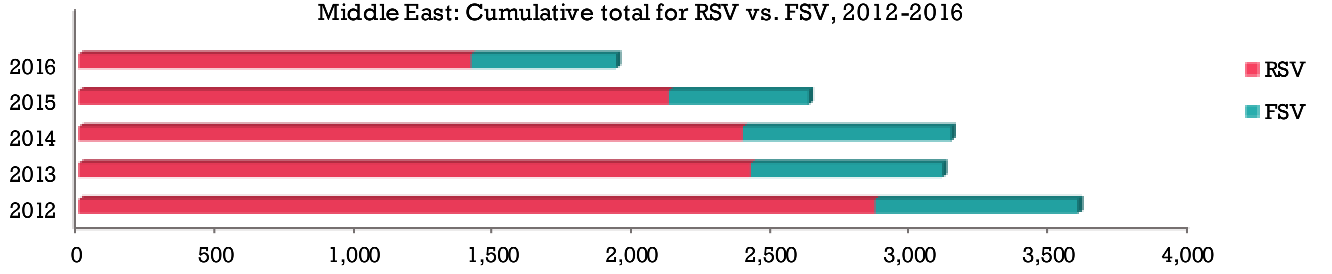
Middle East:

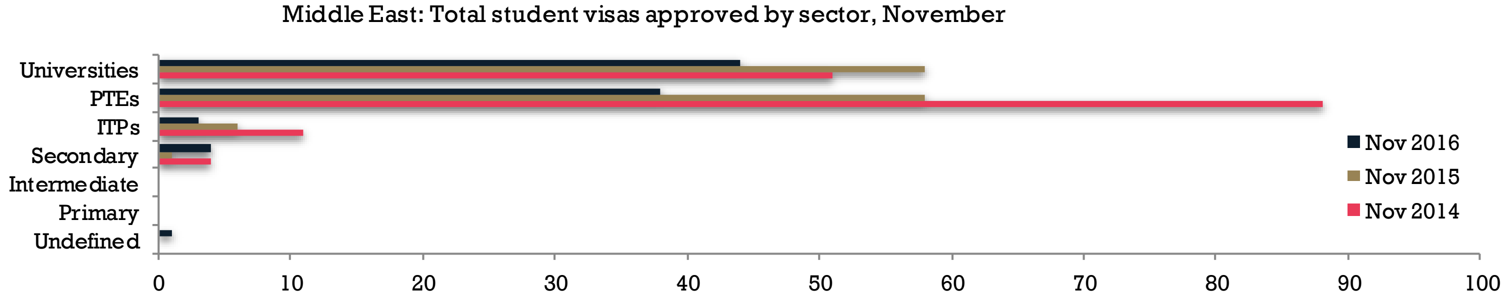
YTD (November)

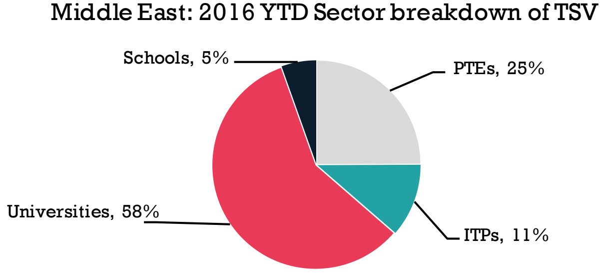
November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
-40 ↓ -51%	7 ↑ 16%	-33 ↓ -27%	-711 ↓ -34%	20 ⇨ 4%	-691 ↓ -26%











Key takeaways:

- Results continue to be down for the Middle East as reductions in scholarship programme intakes, particularly from Saudi Arabia, take effect (-36%, -719). The second biggest country in this region in terms of student numbers, Iran also declined (-6%, -23).
- The university sector accounts for 57% of TSV approved followed by the PTE sector with 25%.

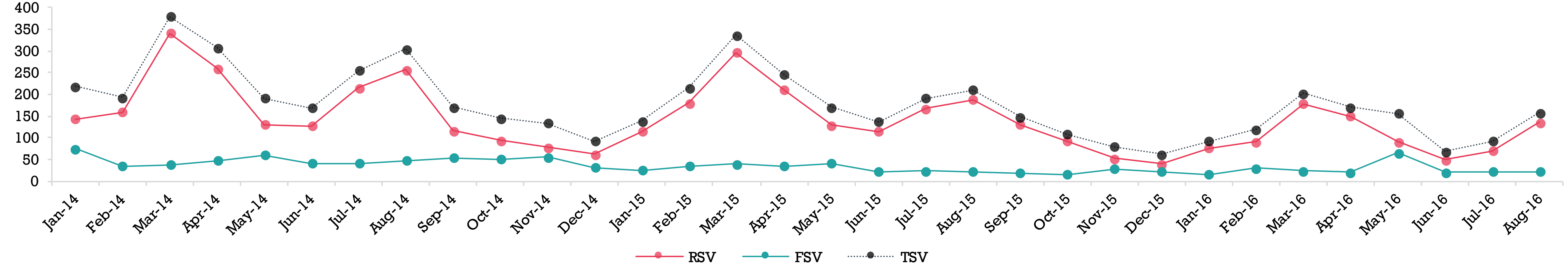
Middle East includes: Bahrain, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Oman, Palestine, Qatar, Saudi Arabia, Syria, United Arab Emirates, Yemen

Saudi Arabia:

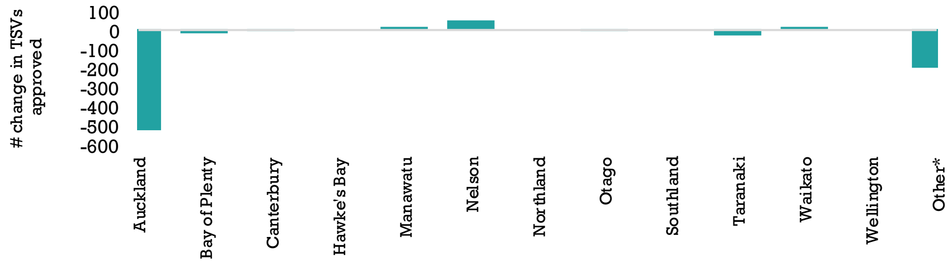
YTD (November)

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
-34 ⇩ -65%	-1 ⇨ -4%	-35 ⇩ -44%	-712 ⇩ -42%	-7 ⇨ -2%	-719 ⇩ -36%

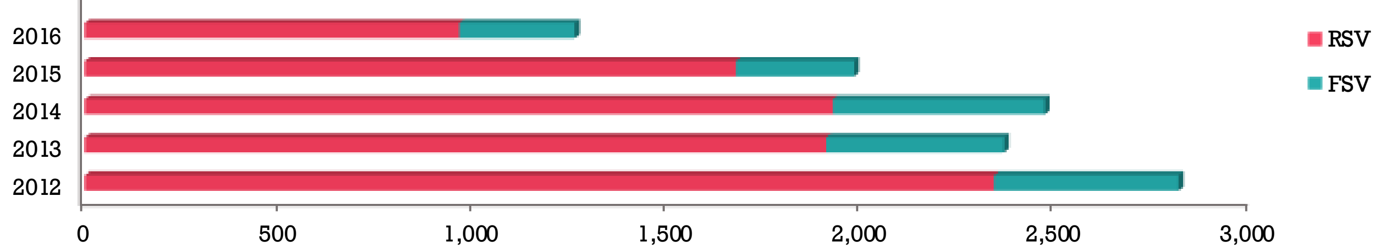
Saudi Arabia: student visas approved 2014-2016



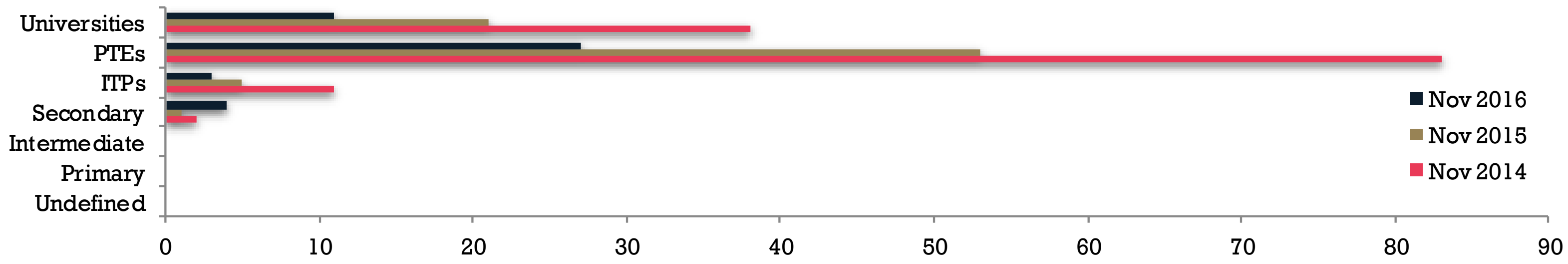
Saudi Arabia: 2016 YTD TSV regional change



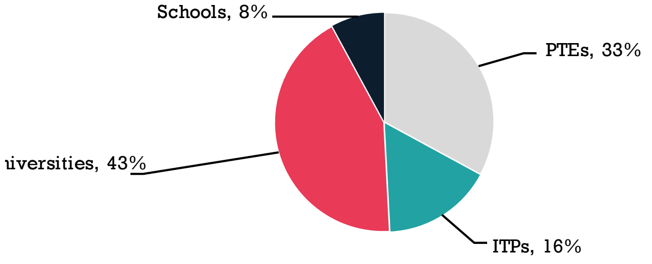
Saudi Arabia: Cumulative total for RSV vs. FSV, 2012-2016



Saudi Arabia: Total student visas approved by sector, November



Saudi Arabia: 2016 YTD Sector breakdown of TSV



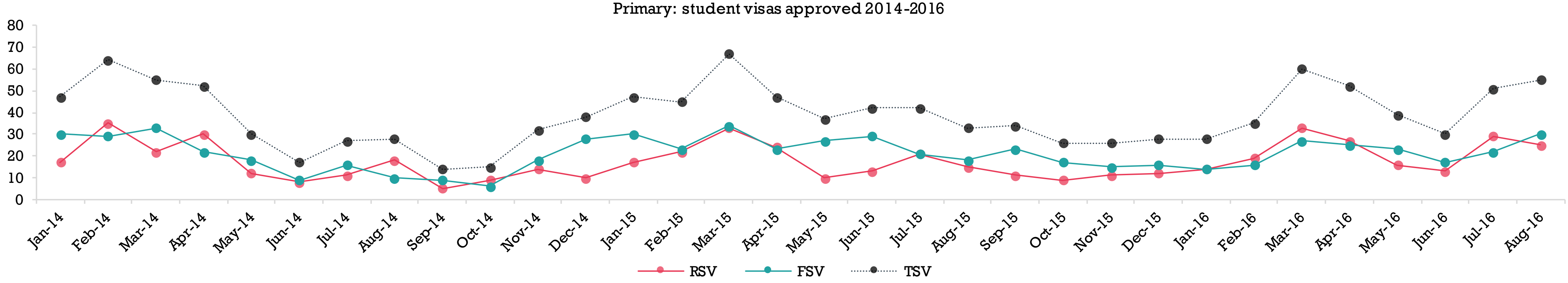
Key takeaways:

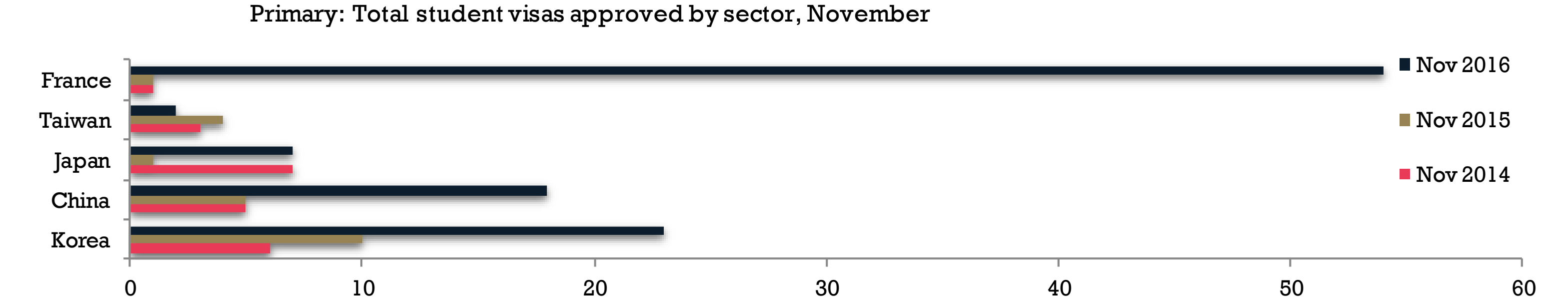
- Saudi Arabia continues to see negative results, with TSV down YTD (-36%, -719). The main driver is RSV (-42%, -712), although FSV have also declined slightly (-2%, -7).
- This decline is due a reduction in the Saudi Arabian scholarship programme.

Trends by sector

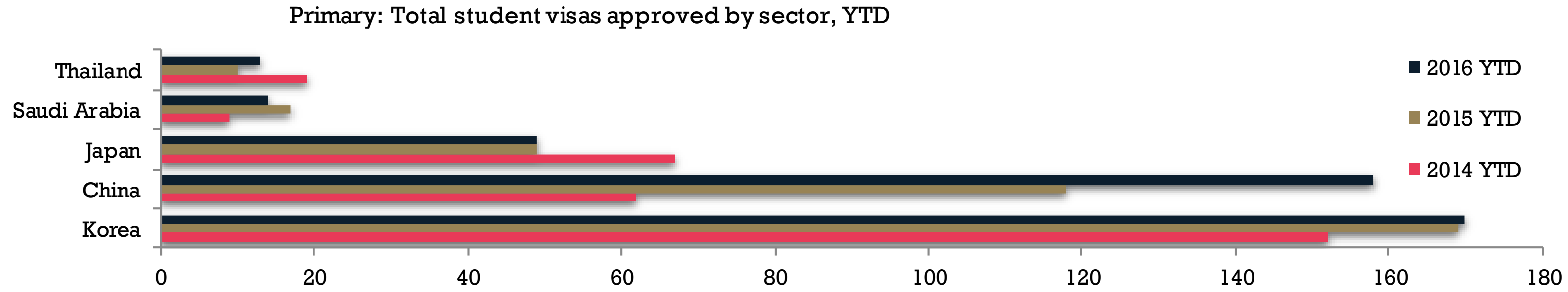
Primary schools:

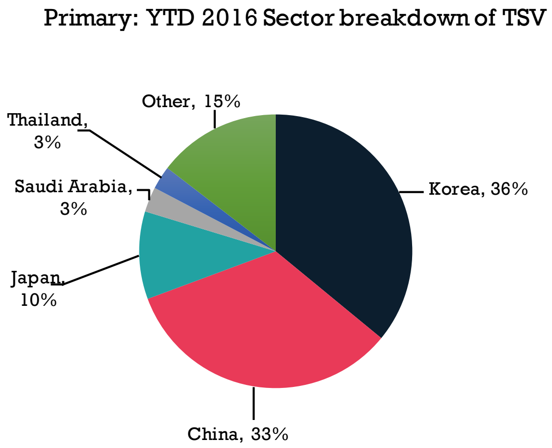
YTD (November)





November RSV		November FSV		November TSV	
9	⇧ 82%	19	⇧ 127%	28	⇧ 108%
YTD RSV		**YTD FSV**		**YTD TSV**	
27	⇧ 15%	0	⇨ 0%	27	⇧ 6%



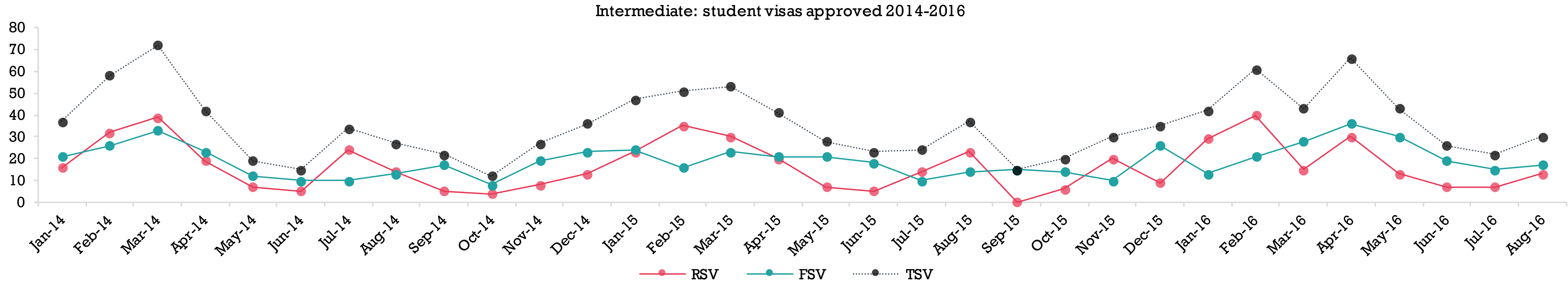


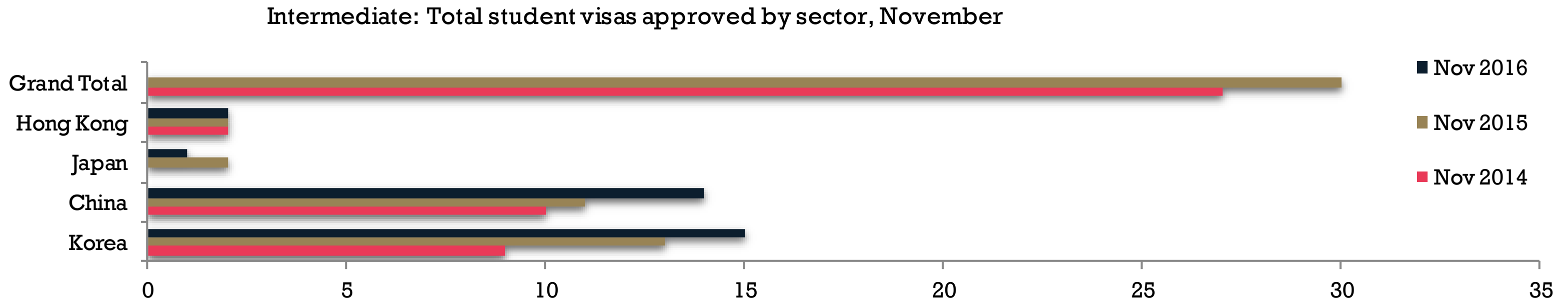
Key takeaways:

- TSV for primary schools have increased by 6% (+27) YTD. This increase was entirely driven by RSV, (15%, +27) with FSV staying flat (0%, 0).
- This increase is almost entirely driven by China (+34%, +40). FSV for China also increased (+26%, +19), and it was the only country to show any increase or decrease in double figure for FSVs YTD.

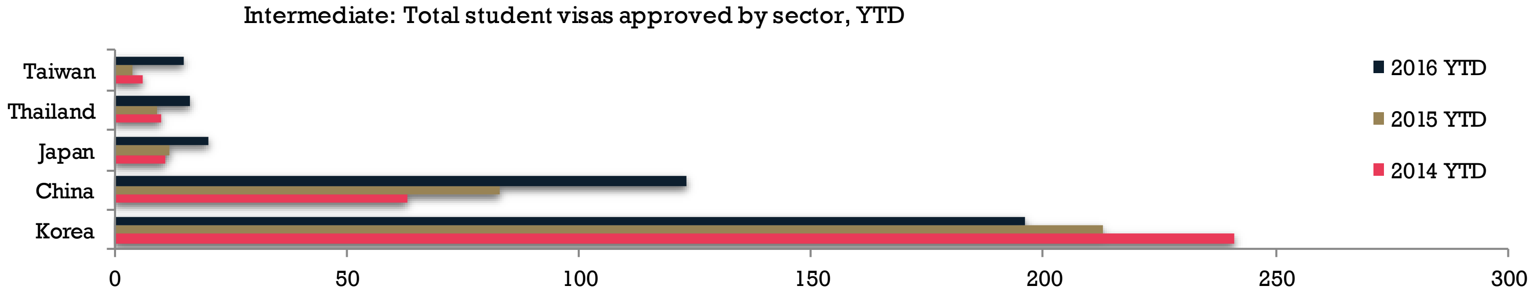
Intermediate schools:

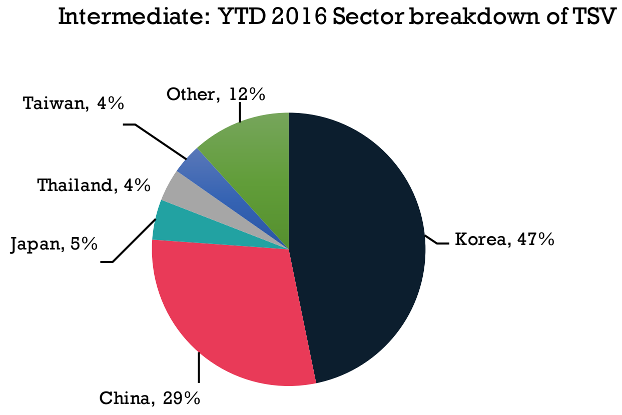
YTD (November)





November RSV	November FSV	November TSV
-6 -30%	8 80%	2 7%
YTD RSV	**YTD FSV**	**YTD TSV**
1 1%	49 26%	50 14%



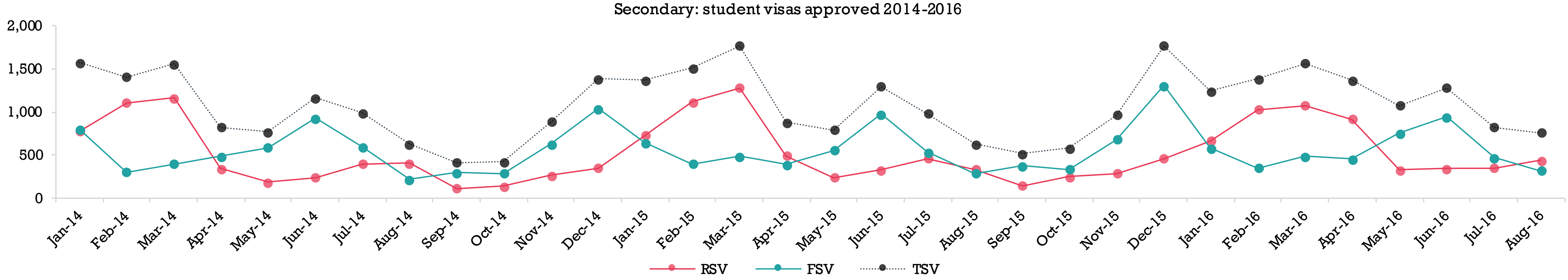


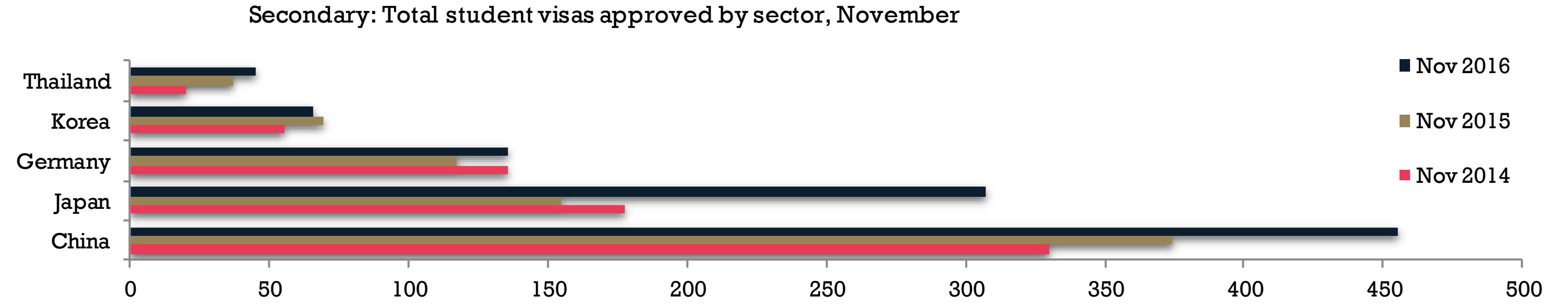
Key takeaways:

- The intermediate school sector is experiencing growth in TSV YTD (+14%, +50). There was a 26%(+49) increase in FSV approved YTD compared to 2015 YTD.
- The main driver of this growth is China (+48%, +40)

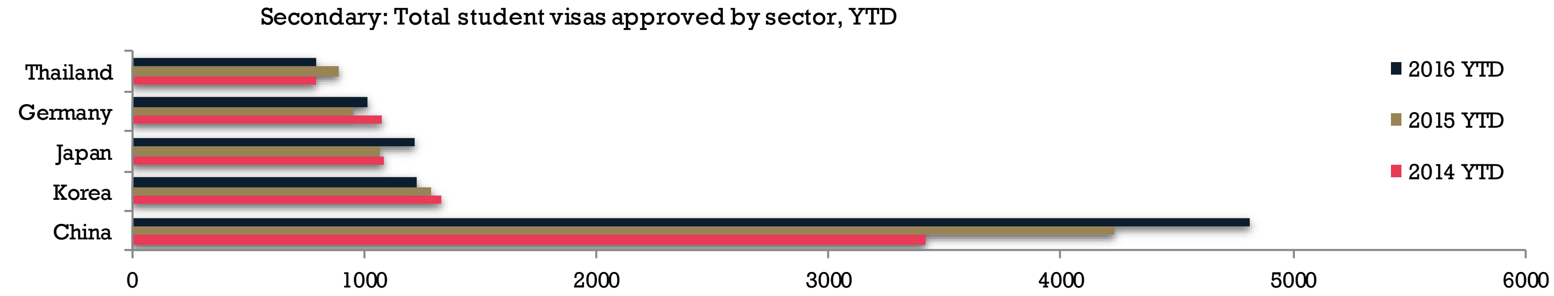
Secondary schools:

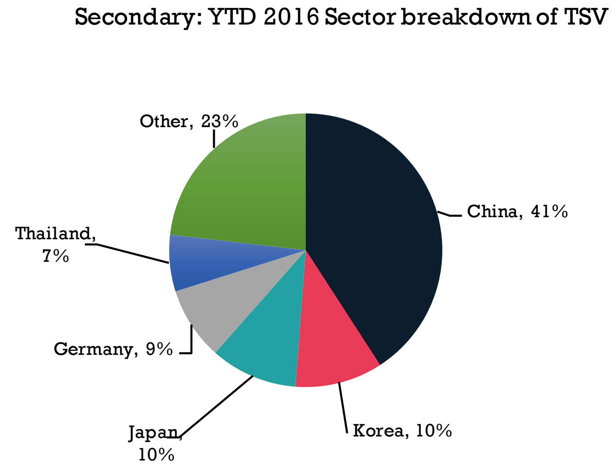
YTD (November)





November RSV		November FSV		November TSV	
119	42%	119	18%	238	25%
YTD RSV		**YTD FSV**		**YTD TSV**	
332	6%	191	3%	523	5%



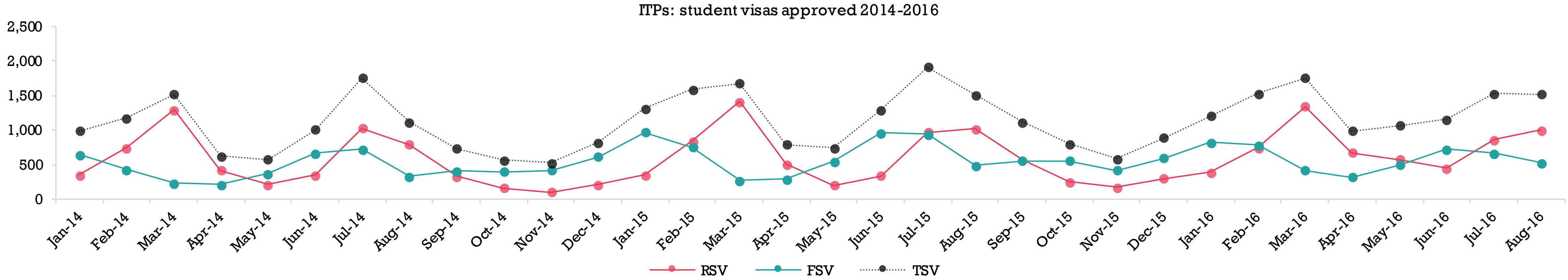


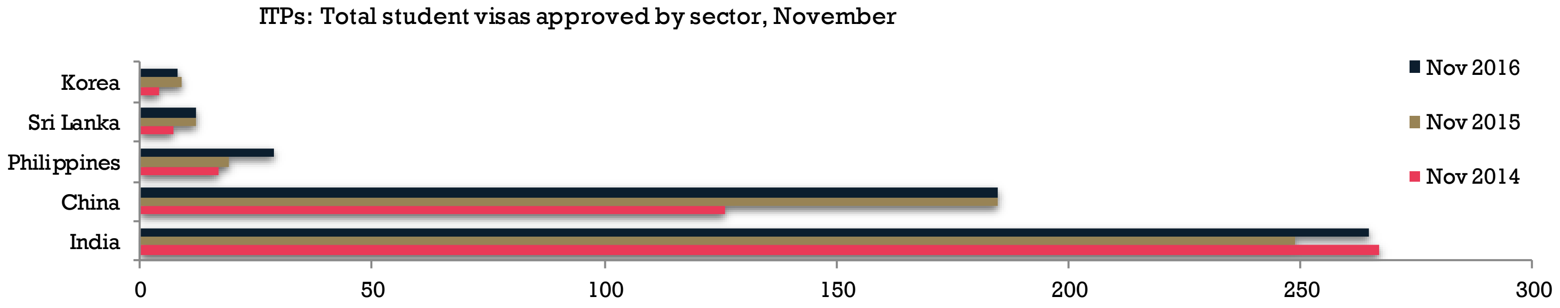
Key takeaways:

- The secondary school market has seen growth of 5% (+523) in TSVs YTD. This growth has been driven by a growth in RSVs (+6%, +332). FSVs have grown less this year (+3%, +191)
- TSVs for China (+14%, +584), and Japan (+14%, +150) shown significant growth. However. TSVs for Chile (-59%, -107) and Thailand (-11%, -101) have shown declines.

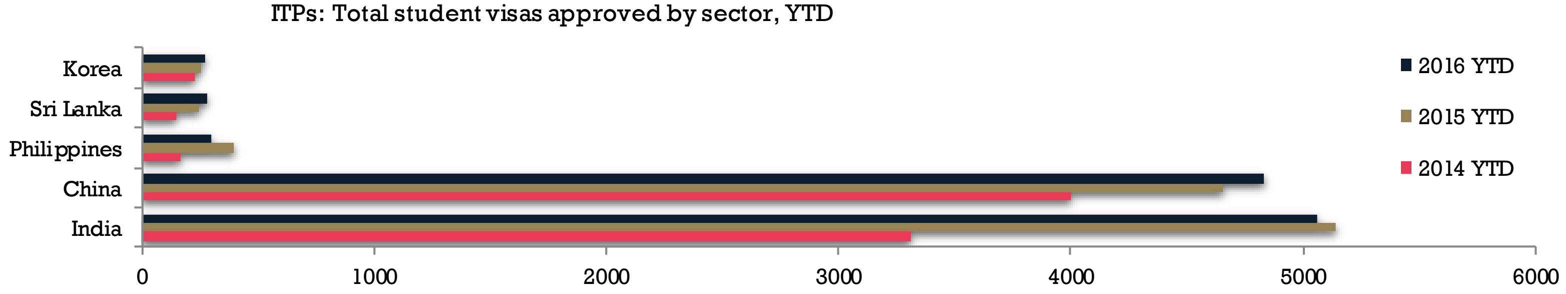
Institutes of Technology and Polytechnics (ITPs)

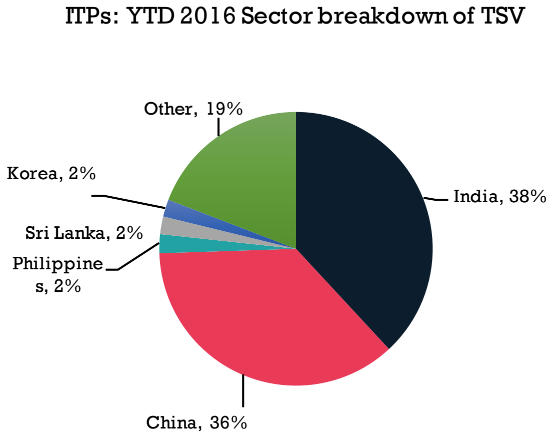
YTD (November)





November RSV		November FSV		November TSV	
67	40%	-27	-6%	40	7%
YTD RSV		**YTD FSV**		**YTD TSV**	
702	11%	-762	-11%	-60	0%

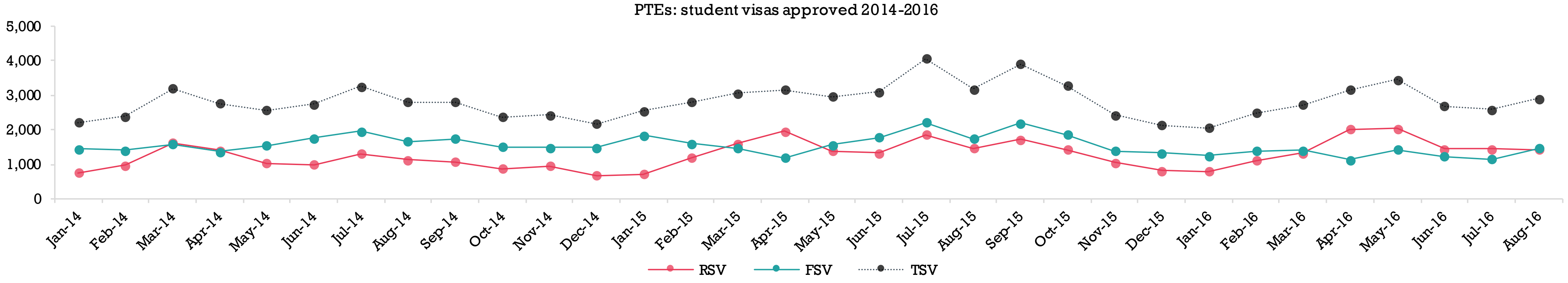


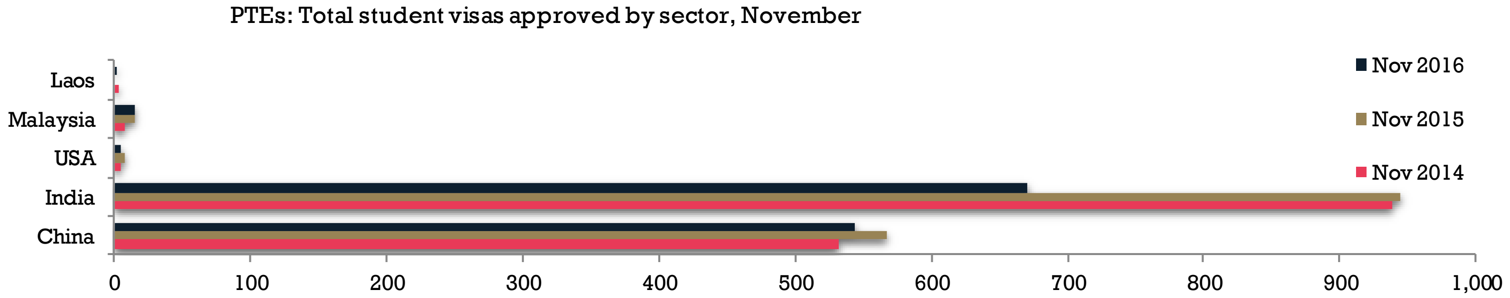


Key takeaways:
- TSV for the year to date have been flat, declining by 60 (-0%). FSV have provided a downward influence (-11%, -762) while RSV have provided an upward influence (+11%, +702)
- The ITP sector's decrease in student visas is mainly due to rule 18. FSVs issued to students from India(-20%, -764) and the Philippines(-33%, -112) have decreased. They have partially been offset by an increase in visas issued to Chinese students (+7%, +81).

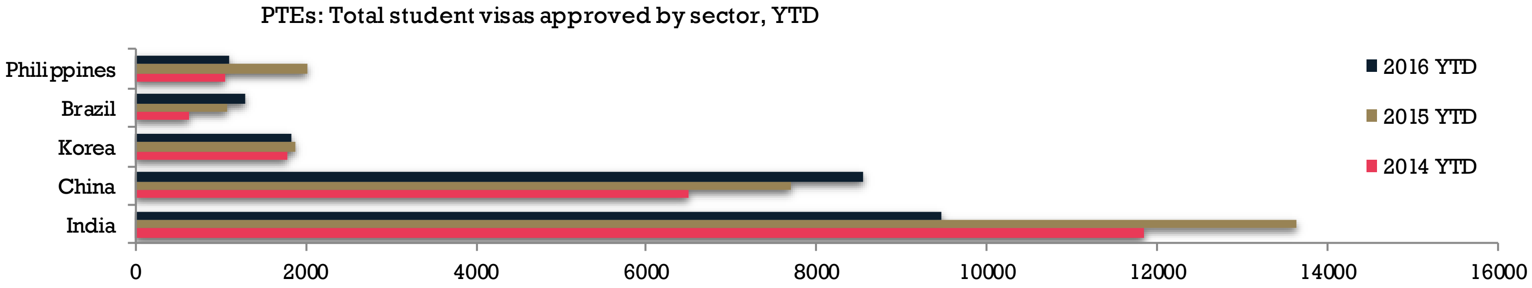
Private Training Establishments (PTEs):

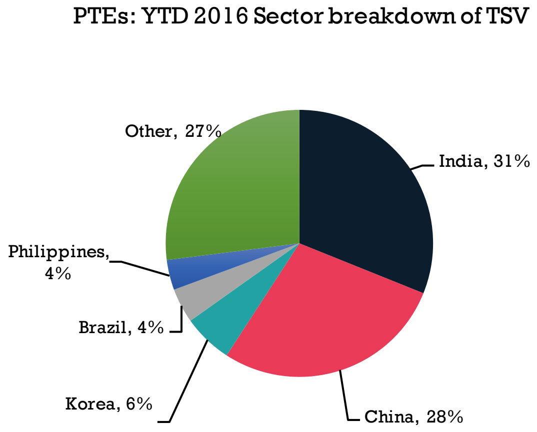
YTD (November)





November RSV		November FSV		November TSV	
3	0%	-268	-19%	-265	-11%
YTD RSV		**YTD FSV**		**YTD TSV**	
605	4%	-4,624	-25%	-4,019	-12%





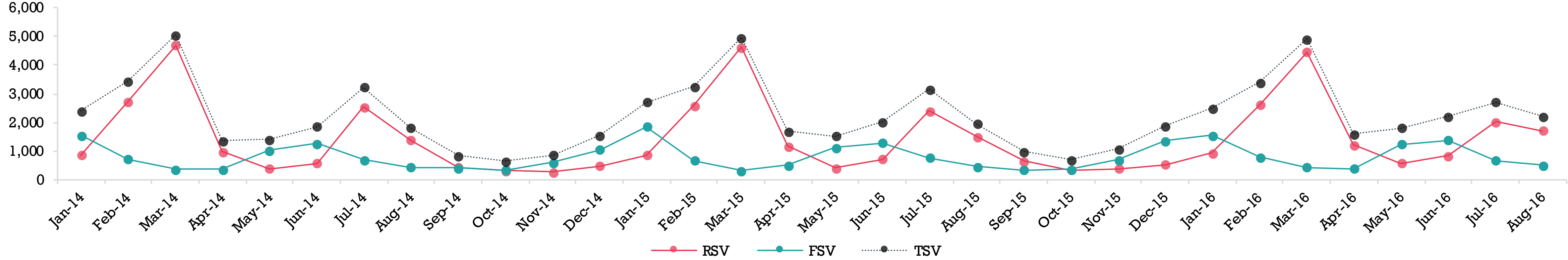
Key takeaways:

- The decline in is being driven by FSV(-25%, -4,624). The strong decrease is largely driven by the decline in FSV approved for students from India and the Philippines (-1,009 YTD) following changes to the English language requirements (Rule 18) in 2015.
- FSV have slightly increased in this sector, up 4% (+605)

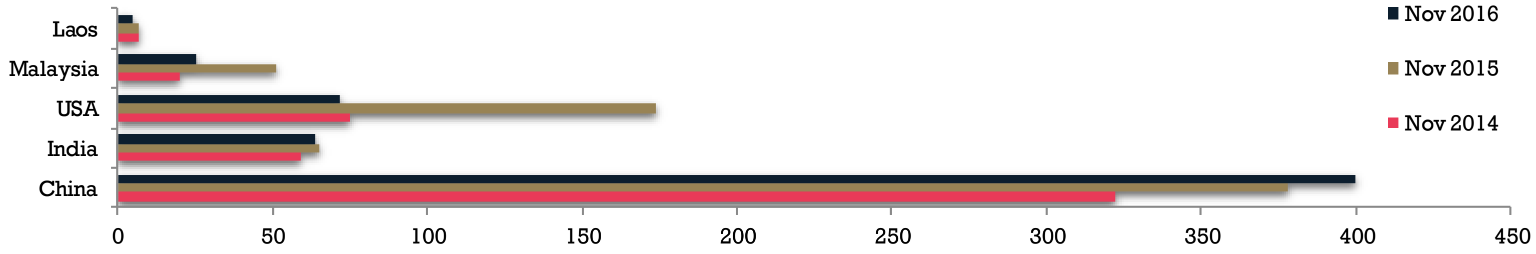
Universities:

YTD (November)

Universities: student visas approved 2014-2016



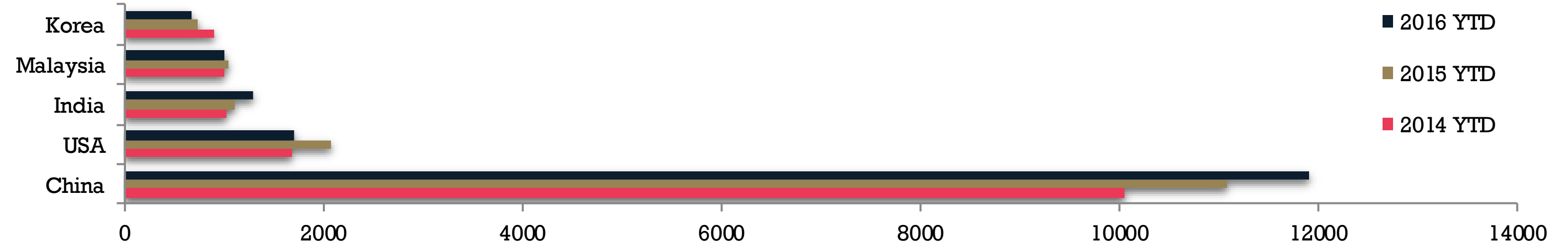
Universities: Total student visas approved by sector, November



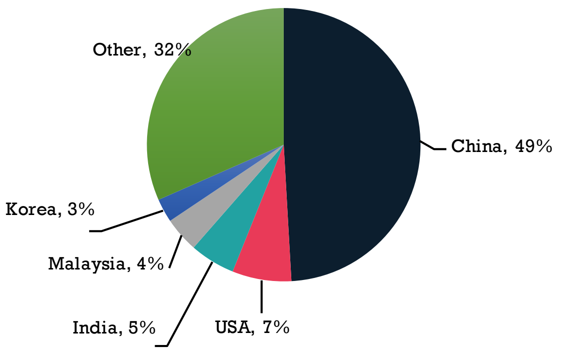
November RSV		November FSV		November TSV	
-65	-17%	-83	-12%	-148	-14%

YTD RSV		YTD FSV		YTD TSV	
288	2%	34	0%	322	1%

Universities: Total student visas approved by sector, YTD



Universities: YTD 2016 Sector breakdown of TSV



Key takeaways:

- YTD results for the university sector remain stable (+1%, +322). There was a slight growth in RSV (+2%, +288), which FSVs were flat (0%, +34)
- China makes up just under half of all TSV approved YTD (47%) for the university sector.

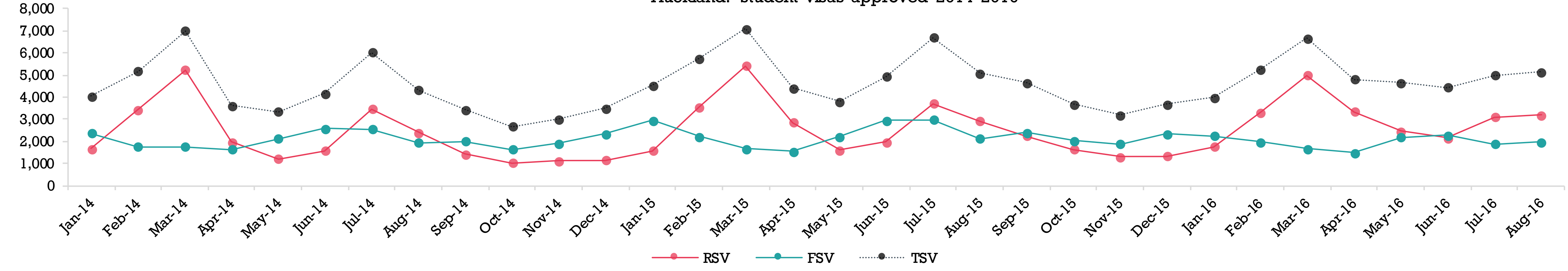
Trends by region

Auckland:

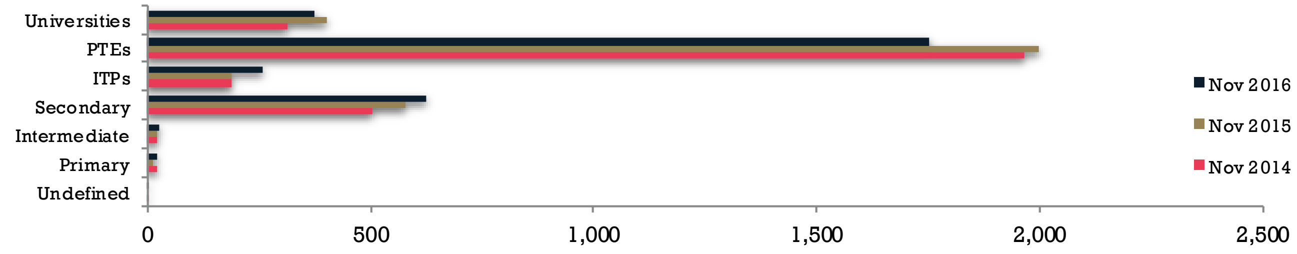
November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
98 7%	-244 -13%	-146 -5%	1,548 5%	-4,289 -17%	-2,741 -5%

YTD (November)

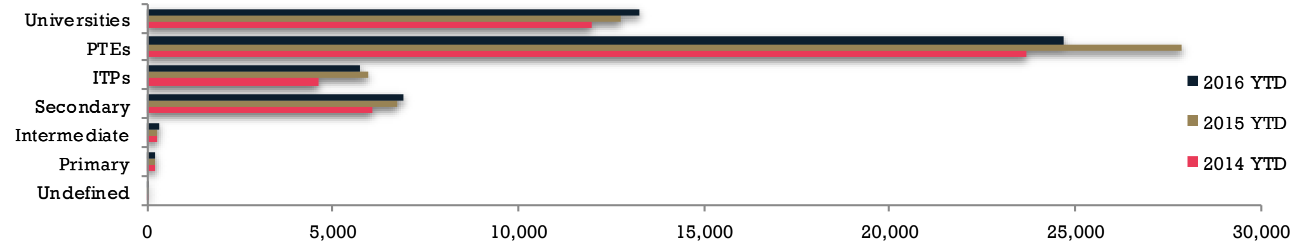
Auckland: student visas approved 2014-2016



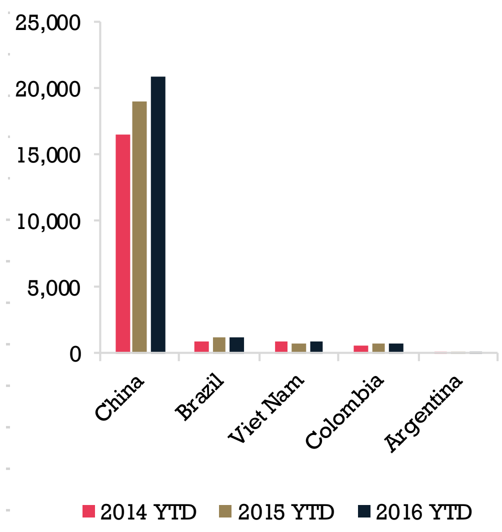
Auckland: Total student visas approved by sector, November



Auckland: Total student visas approved by sector, YTD



Auckland: YTD top five market shifts (TSVs)



Top FSV shifts

November FSV	Change	%change
China	32	6%
Japan	25	40%
Korea	17	13%
Brazil	-18	-25%
USA	-38	-73%
India	-218	-42%

FSVs YTD	Change	%change
China	373	7%
Viet Nam	83	35%
Japan	70	10%
Bangladesh	-139	-60%
Philippines	-832	-52%
India	-4104	-48%

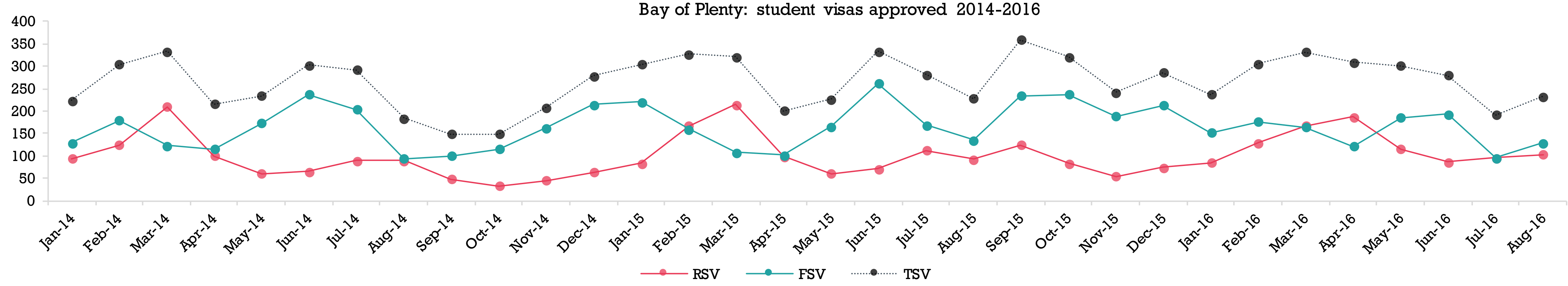
Key takeaways:

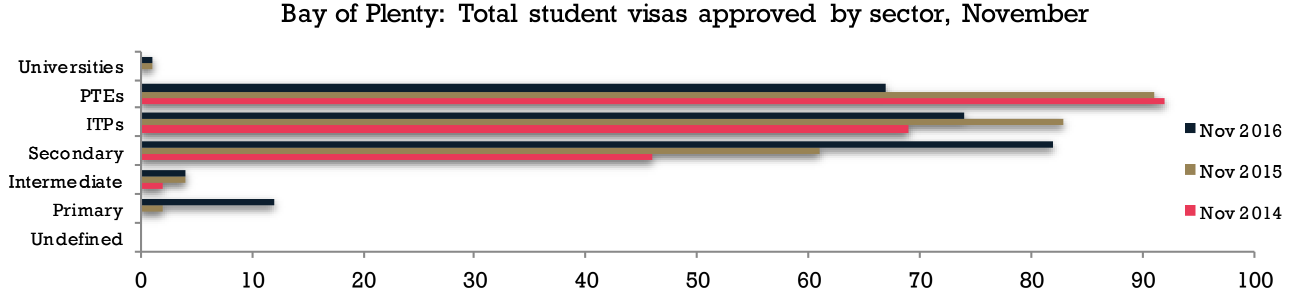
- The Auckland region has decreased YTD for TSV, down 5% (-2,741). This decrease in is driven by an increase in FSV YTD (-17%, -4,289), being driven by a drop in approvals for Indian (-48%, -4,104) and Filipino (-52%, -832) students as a result of the change in English language requirements (Rule 18) in 2015.
- This decrease has partly been offset by an increase in RSV (+5%, +1,548).

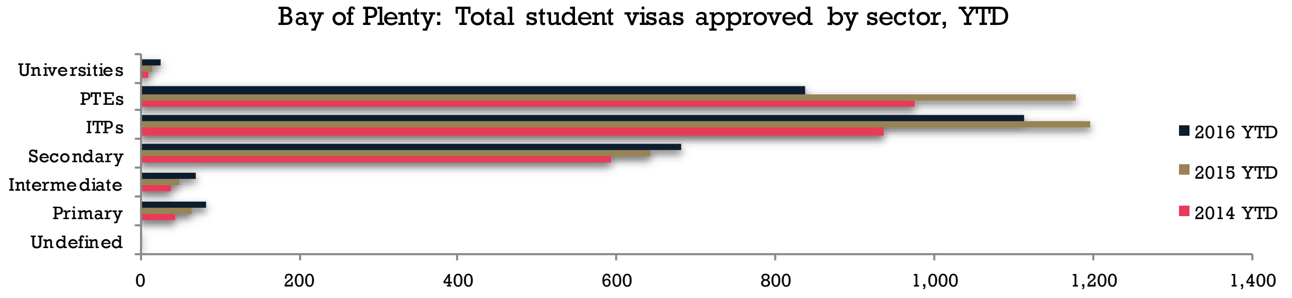
Bay of Plenty:

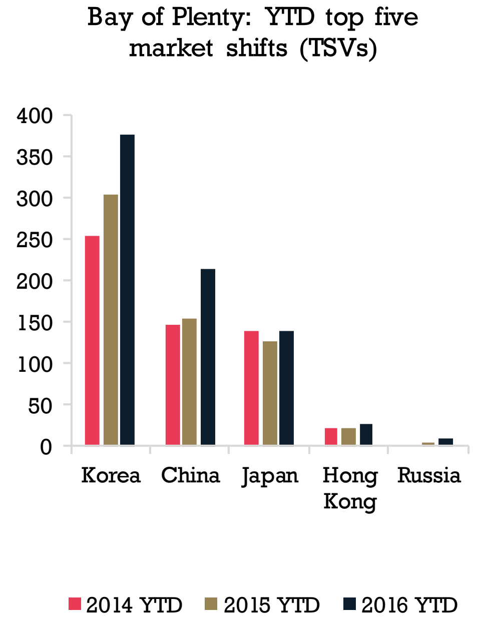
November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
8	15%	-10	-5%	-2	-1%	27	2%	-363	-18%	-336	-11%

YTD (November)









Top FSV shifts

November FSV	Change	%change
Korea	10	91%
Japan	8	35%
Philippines	7	39%
Brazil	-2	-33%
Nepal	-5	-50%
India	-33	-45%

FSVs YTD	Change	%change
Korea	76	58%
China	26	39%
Japan	13	17%
Brazil	-32	-43%
India	-194	-24%
Philippines	-210	-56%

Key takeaways:

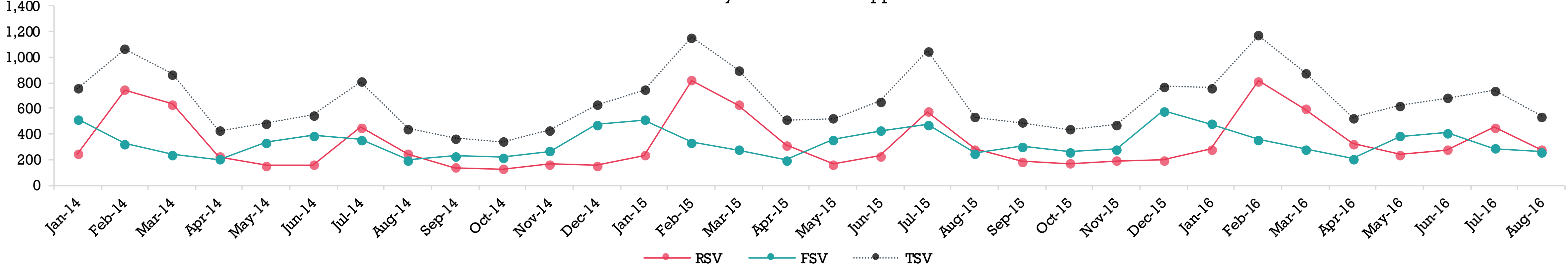
- TSV approved for Bay of Plenty are down YTD (-11%, -336). This was driven by a decrease in FSV (-18%, -363), but was partly offset by an increase in RSV (+2%, +27).
- The decrease in visas was mainly in the PTE (-29%, -340) sector.

Canterbury:

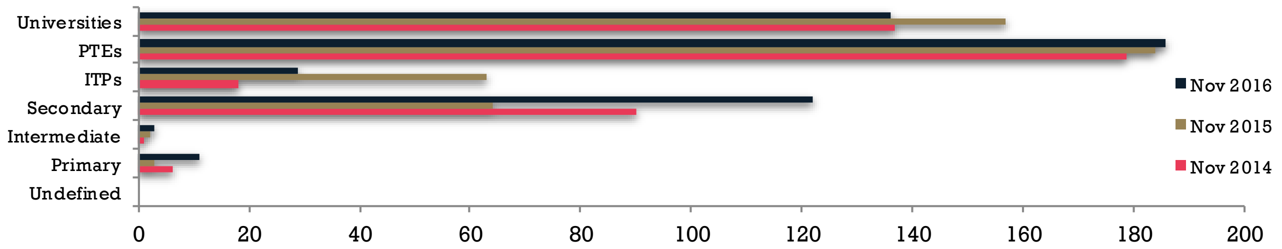
YTD (November)

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
20 11%	-6 -2%	14 3%	99 3%	-277 -8%	-178 -2%

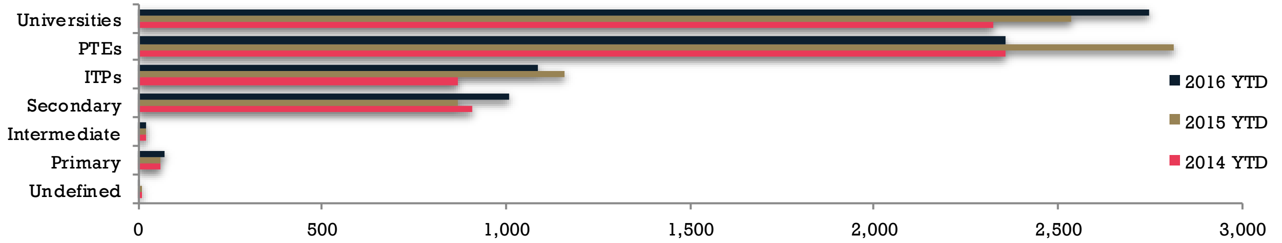
Canterbury: student visas approved 2014-2016



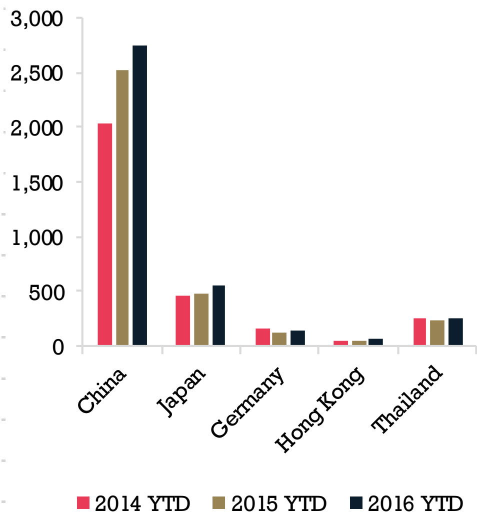
Canterbury: Total student visas approved by sector, November



Canterbury: Total student visas approved by sector, YTD



Canterbury: YTD top five market shifts (TSVs)



Top FSV shifts

November FSV	Change	%change
Japan	38	173%
China	10	20%
Germany	8	89%
Philippines	-7	-58%
USA	-19	-46%
India	-49	-60%

FSVs YTD	Change	%change
China	64	9%
Japan	56	20%
Indonesia	19	79%
USA	-78	-25%
Philippines	-98	-46%
India	-278	-28%

Key takeaways:

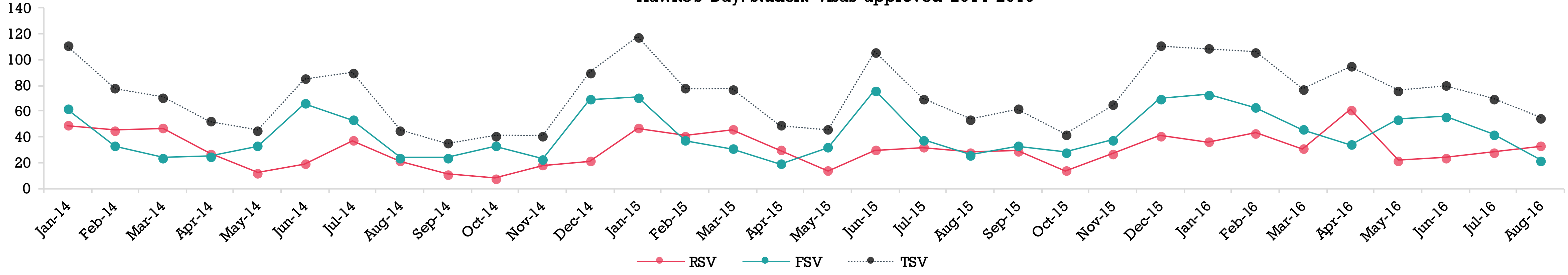
- Canterbury results remain stable YTD, compared to 2015 YTD (-2%, -178)
- PTE showed a significant decline in TSV from YTD 2015 to YTD 2016 (-16%, -460). This was offset by increases in schools (+161, +151) and universities (+8%, +211)

Hawke's Bay:

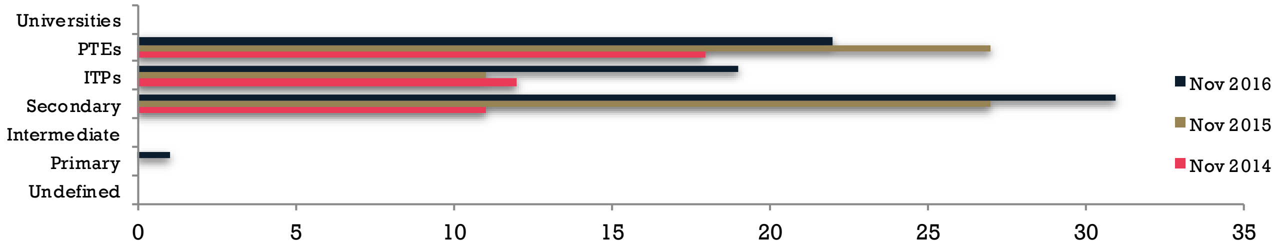
YTD (November)

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
-1	-4%	9	24%	8	12%	18	5%	48	11%	66	9%

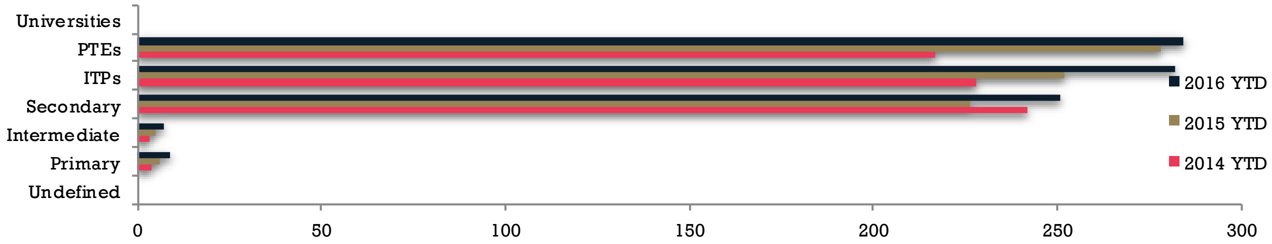
Hawke's Bay: student visas approved 2014-2016



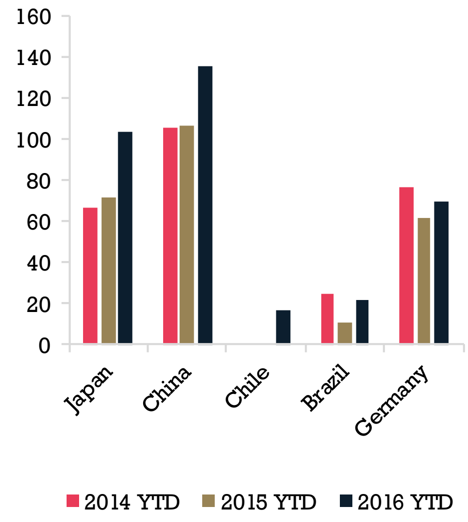
Hawke's Bay: Total student visas approved by sector, November



Hawke's Bay: Total student visas approved by sector, YTD



Hawke's Bay: YTD top five market shifts (TSVs)



Top FSV shifts

November FSV	Change	%change
Japan	11	100%
Germany	5	500%
Saudi Arabia	3	-
China	-2	-50%
Thailand	-3	-50%
India	-7	-58%

FSVs YTD	Change	%change
Japan	27	73%
China	19	53%
Chile	17	-
Viet Nam	-5	-71%
Korea	-8	-53%
India	-45	-28%

Key takeaways:

- Results are positive in Hawke's Bay, with a 9% increase in TSV seen YTD (+66). This increase was mainly from an increase of 11% in FSV (+48), although RSV also increased by 5%.
- Visas issued in the Hawke's Bay were stable or increased for all sectors. The most significant increase was for the ITP sector (+12%, +30).

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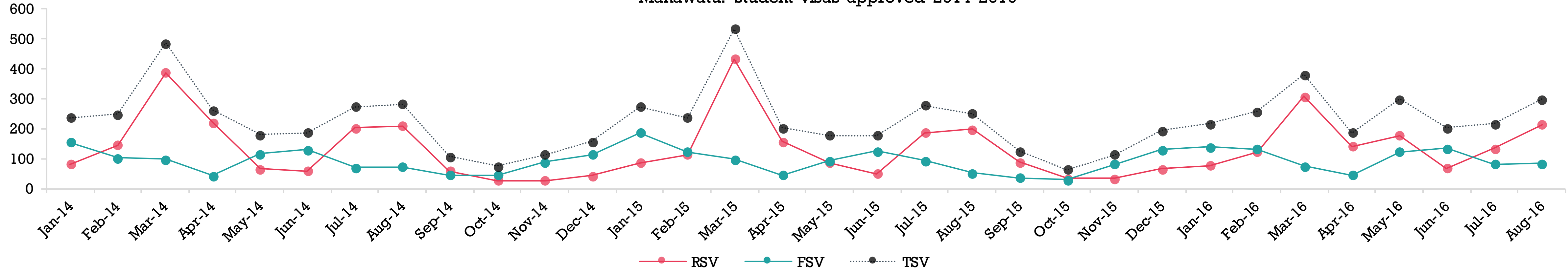
Manawatu:

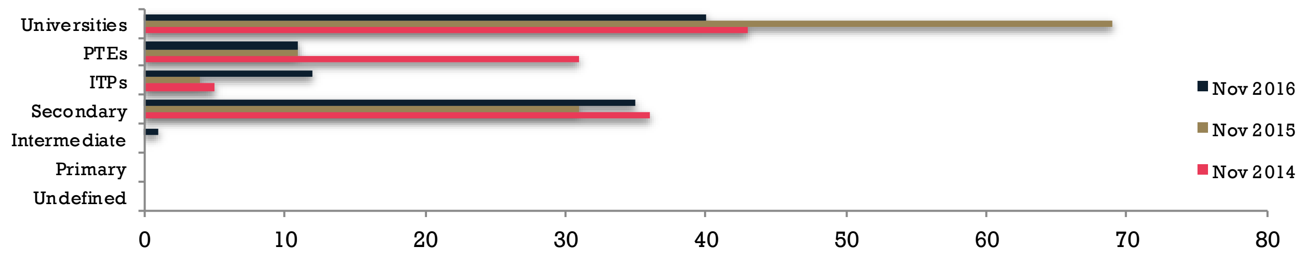
YTD (November)

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
-3	-9%	-13	-16%	-16	-14%	-65	-4%	-16	-2%	-81	-3%

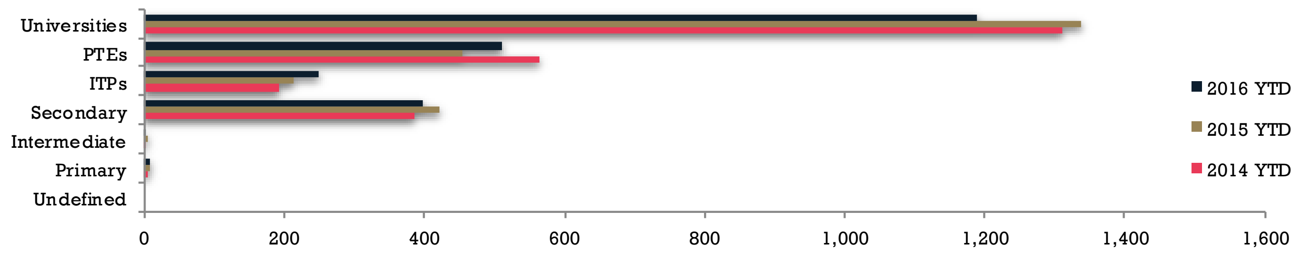
Manawatu: student visas approved 2014-2016



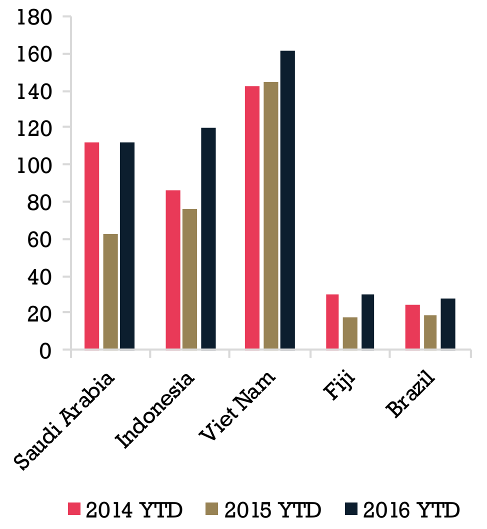
Manawatu: Total student visas approved by sector, November



Manawatu: Total student visas approved by sector, YTD



Manawatu: YTD top five market shifts (TSVs)



Top FSV shifts

November FSV	Change	%change
Japan	7	140%
Bhutan	1	-
Brazil	1	-
Hong Kong	-3	-100%
Viet Nam	-4	-67%
USA	-12	-67%

FSVs YTD	Change	%change
Indonesia	60	375%
Saudi Arabia	24	300%
Germany	13	42%
USA	-40	-38%
Thailand	-57	-70%
India	-59	-35%

key takeaways:

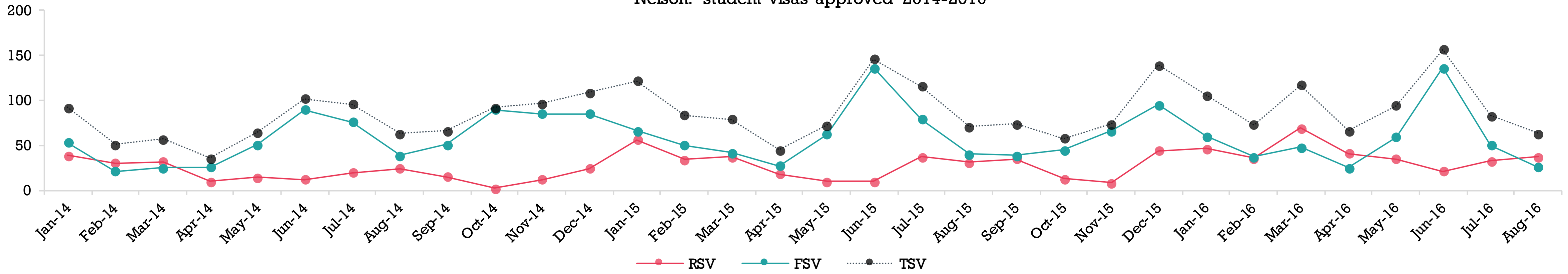
- YTD results for the region are slightly down compared to 2015 YTD (-3%, -81). This is being driven by both RSV (-4%, -65) and FSV (-2%, -16). The three markets that contributed most to this decline were India, USA and Thailand.
- Despite the overall decline, the ITP (+18%, +38) and PTE (+12%, +56) sectors have both experienced growth in TSV approved YTD.

Nelson:

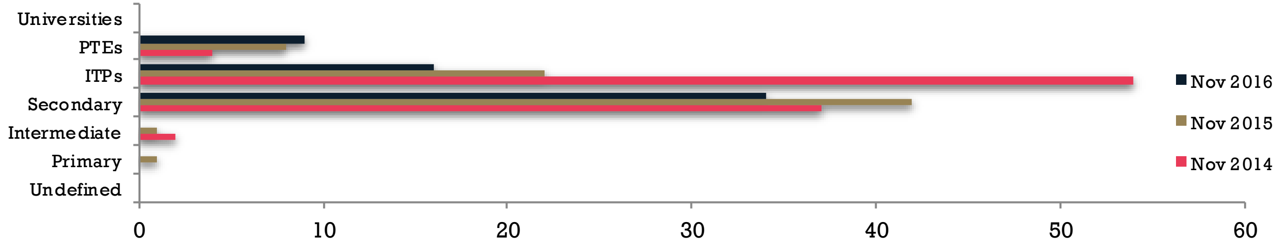
November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
9	113%	-24	-36%	-15	-20%	94	33%	-125	-19%	-31	-3%

YTD (November)

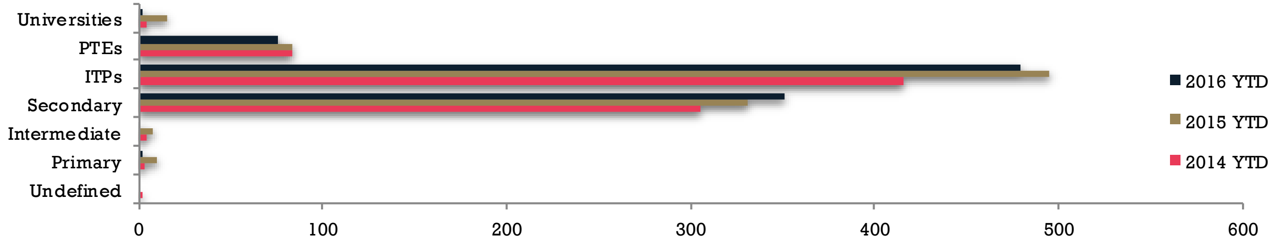
Nelson: student visas approved 2014-2016



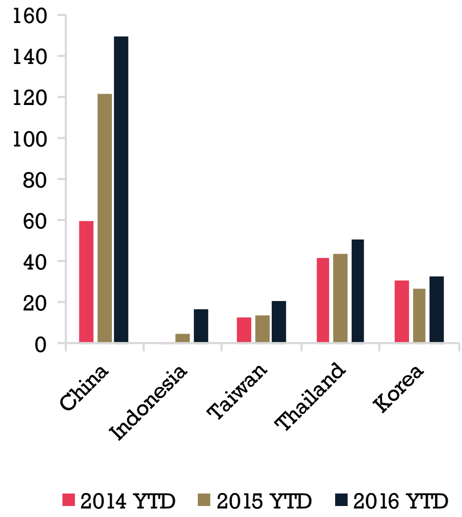
Nelson: Total student visas approved by sector, November



Nelson: Total student visas approved by sector, YTD



Nelson: YTD top five market shifts (TSVs)



Top FSV shifts

November FSV	Change	%change
Japan	7	175%
Taiwan	4	-
Cambodia	1	-
India	-5	-63%
Nepal	-5	-100%
Germany	-12	-55%

FSVs YTD	Change	%change
China	27	38%
Japan	24	75%
Indonesia	9	450%
Nepal	-13	-59%
Sri Lanka	-16	-55%
India	-135	-74%

Key takeaways:

- The Nelson region has experienced a slight decline in TSV approved YTD (-3%, -31). This was driven by FSV, which decreased by 19% (-125), and was partly offset by RSV which increased by 33% (+94).
- Most of this decrease was in ITPs.

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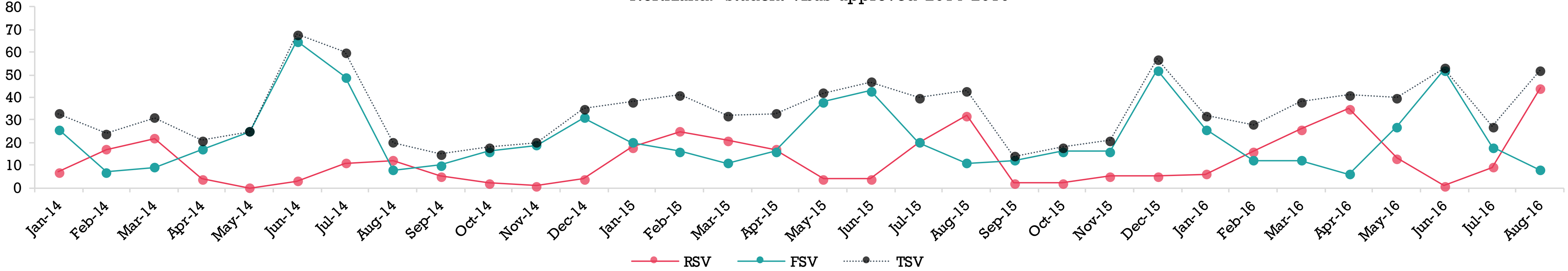
Northland:

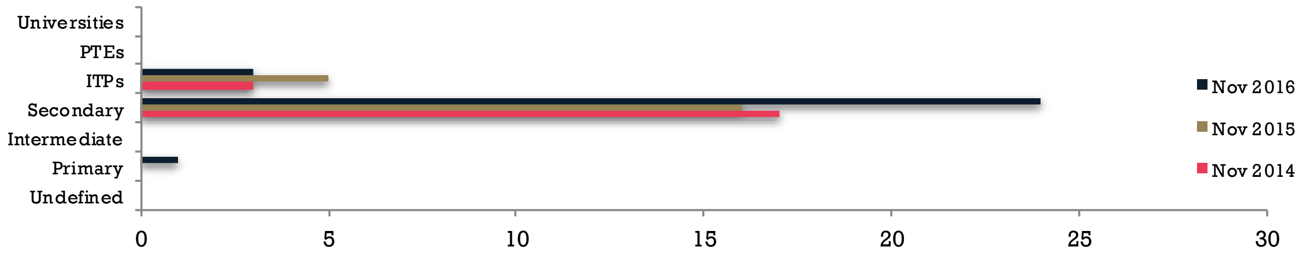
November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
-2	-40%	9	56%	7	33%	31	21%	-23	-11%	8	2%

YTD (November)

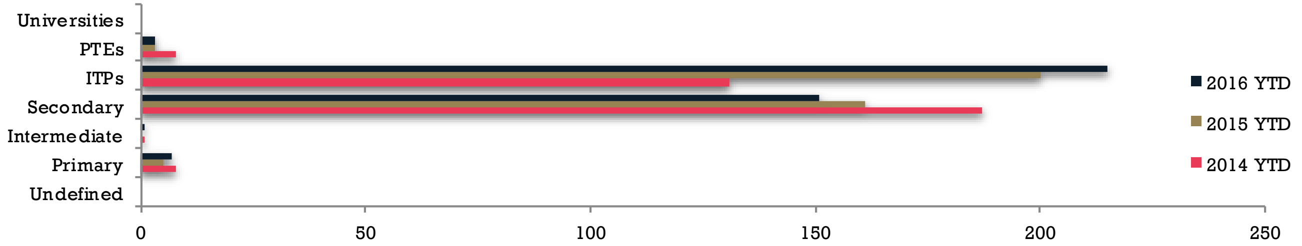
Northland: student visas approved 2014-2016



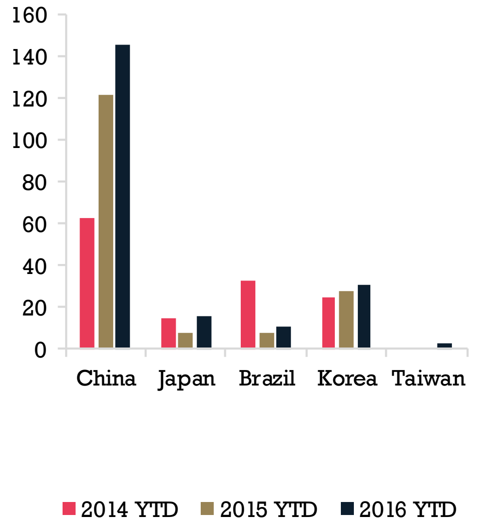
Northland: Total student visas approved by sector, November



Northland: Total student visas approved by sector, YTD



Northland: YTD top five market shifts (TSVs)



Top FSV shifts

November FSV	Change	%change
Japan	6	120%
Germany	4	67%
France	1	-
Brazil	-1	-100%
India	-1	-50%
Macau	-1	-100%

FSVs YTD	Change	%change
Japan	9	150%
Taiwan	3	-
Belgium	2	200%
Italy	-4	-29%
Switzerland	-4	-57%
India	-16	-42%

Key takeaways:

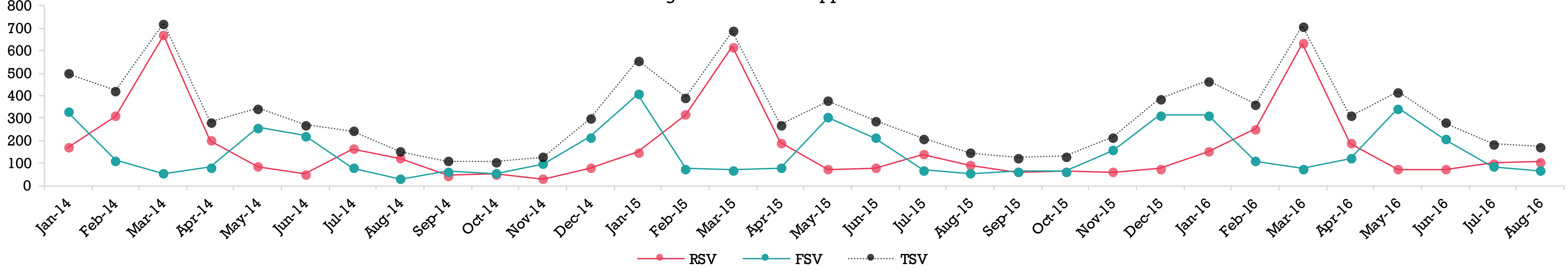
- Northland's results are mixed, with the number of TSV approved remaining stable YTD (+2%, +8). This was a region of two halves, with RSV increasing by 21% (+31) and FSV decreasing by 11% (-23).
- There was a slight increase in ITP visas, but schools declined.

Otago:

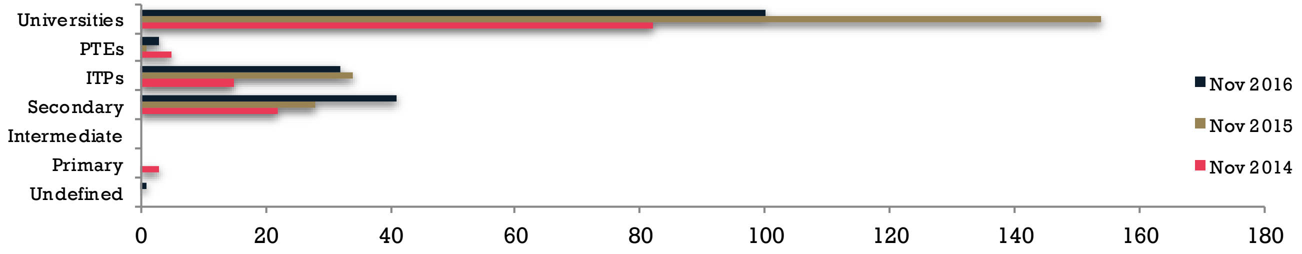
November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
-11	-19%	-29	-18%	-40	-18%	-85	-5%	37	2%	-48	-1%

YTD (November)

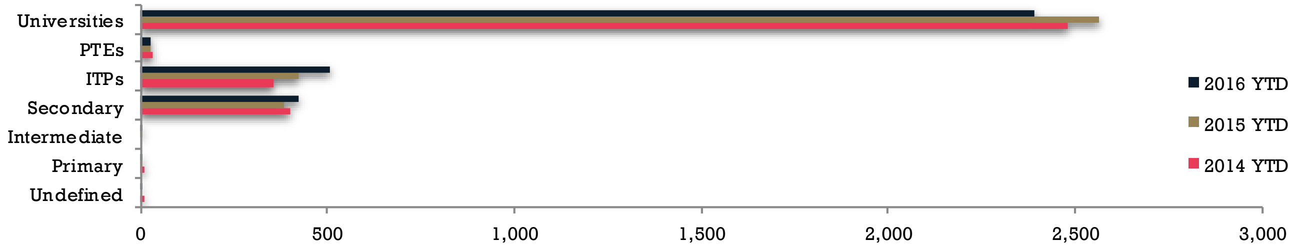
Otago: student visas approved 2014-2016



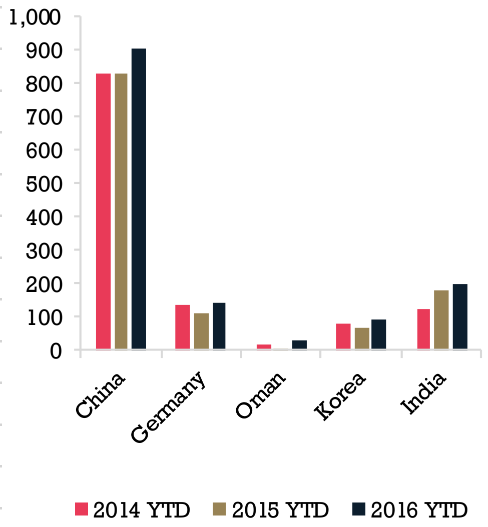
Otago: Total student visas approved by sector, November



Otago: Total student visas approved by sector, YTD



Otago: YTD top five market shifts (TSVs)



Top FSV shifts

November FSV	Change	%change
Japan	12	240%
Korea	6	600%
Germany	3	25%
UK	-4	-80%
Czech Republic	-5	-100%
USA	-38	-78%

FSVs YTD	Change	%change
Germany	33	39%
China	27	16%
Korea	18	106%
Malaysia	-7	-10%
UK	-14	-39%
USA	-106	-19%

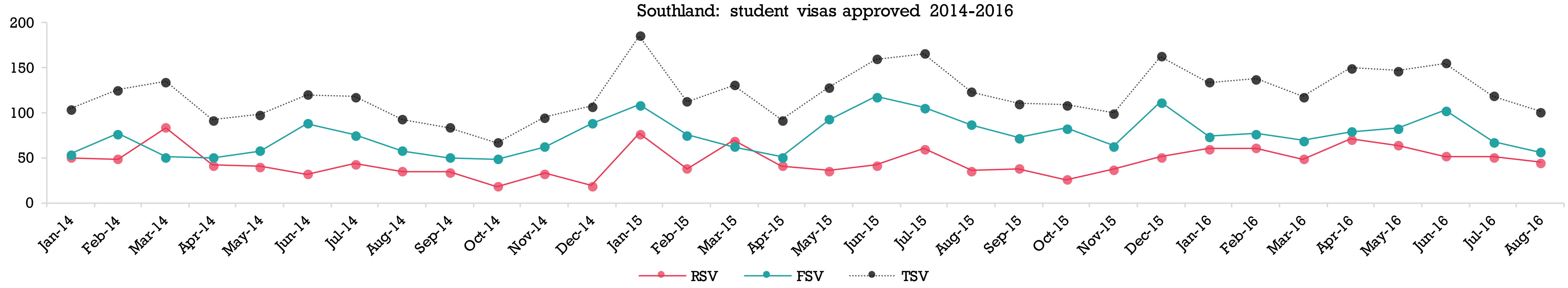
Key takeaways:

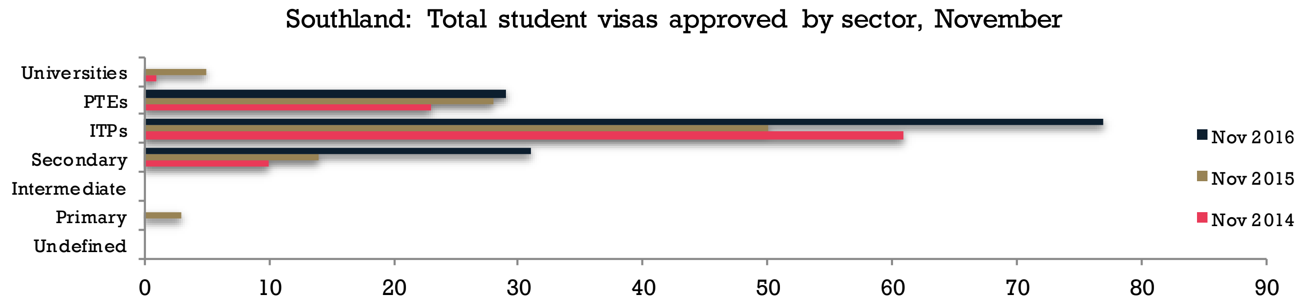
- TSV are stable YTD for the Otago region (-1%, -48). The decrease was driven by RSV (-5%, -85) but FSV increased by 2% (+37).
- ITPs in the Otago region continue to experience strong growth in TSV YTD (+20%, +84) while the university sector has declined (-7%, -176).

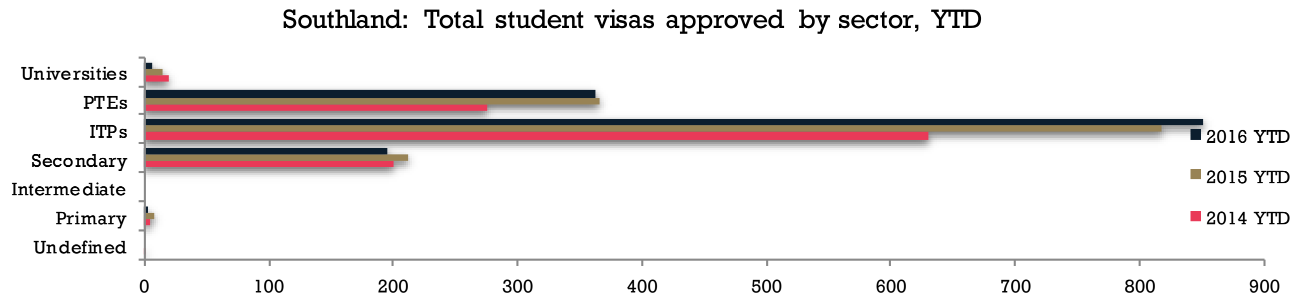
Southland:

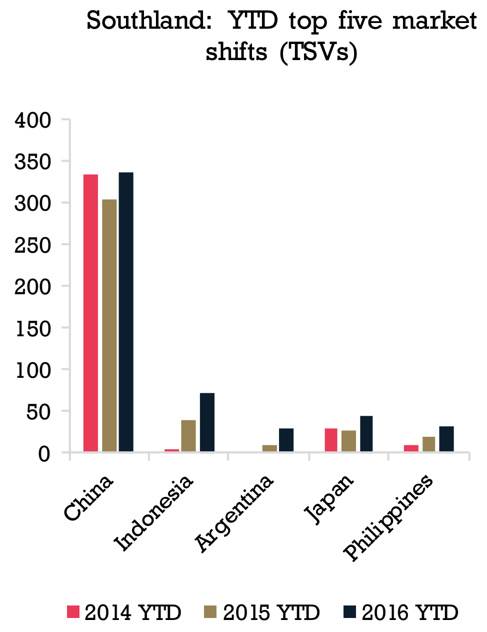
November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
17	46%	20	32%	37	37%	106	21%	-107	-12%	-1	0%

YTD (November)









Top FSV shifts

November FSV	Change	%change
Japan	10	500%
China	8	114%
Thailand	7	100%
Switzerland	-2	-100%
USA	-2	-100%
France	-5	-100%

FSVs YTD	Change	%change
Japan	20	111%
China	18	20%
Thailand	18	31%
Viet Nam	-23	-52%
Brazil	-25	-23%
India	-123	-65%

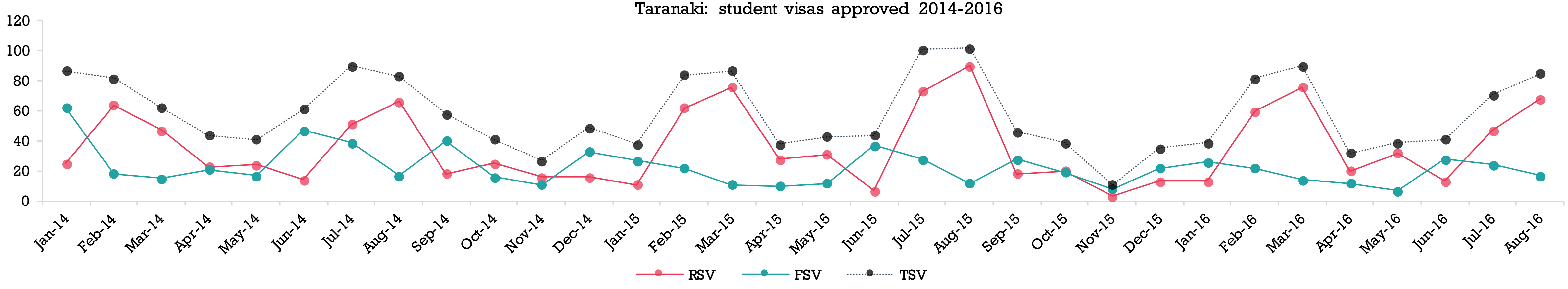
Key takeaways:
- Southland is experiencing flat YTD for TSVs (-0%, -1). FSVs have declined by 12% (-107) while RSV have increased by 21% (+106).
- The decrease was seen in all sectors apart from ITPs which increased by 4% (+33).

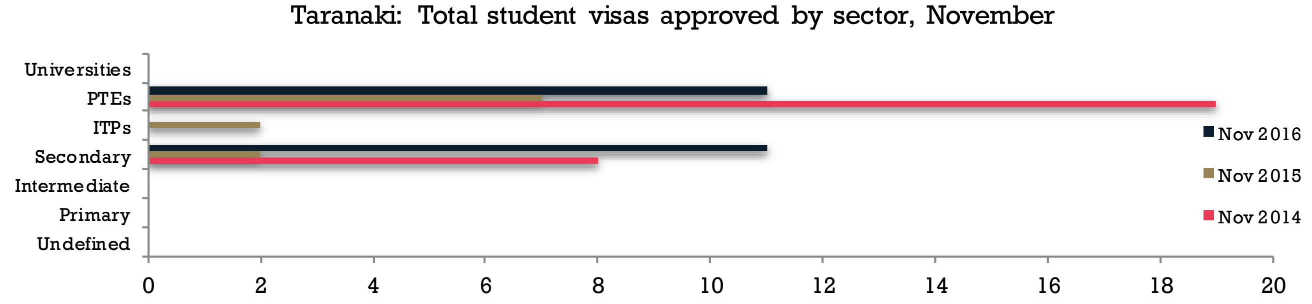
Taranaki:

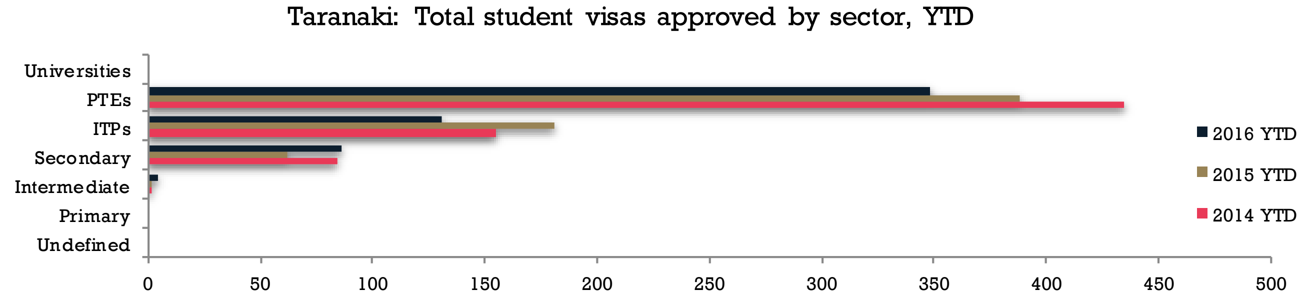
November RSV		November FSV		November TSV	
3	100%	8	100%	11	100%

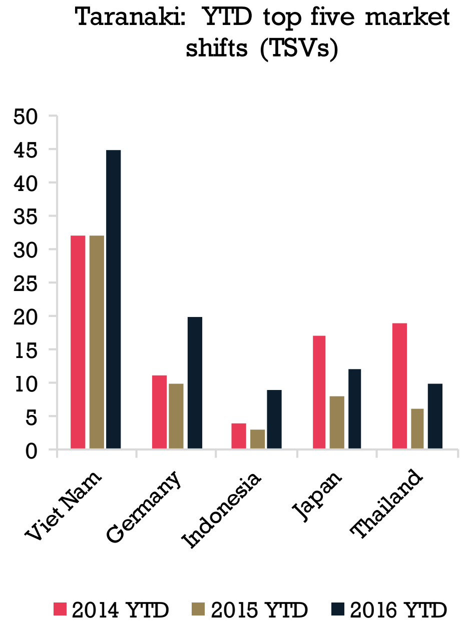
YTD (November)

YTD RSV		YTD FSV		YTD TSV	
-38	-9%	-26	-12%	-64	-10%









Top FSV shifts

November FSV	Change	%change
Germany	4	-
Japan	4	400%
Bulgaria	1	-
India	0	0%
China	-1	-50%
Switzerland	-1	-100%

FSVs YTD	Change	%change
Germany	9	90%
Viet Nam	8	400%
Japan	6	200%
Switzerland	-2	-100%
Philippines	-5	-100%
India	-56	-44%

Key takeaways:

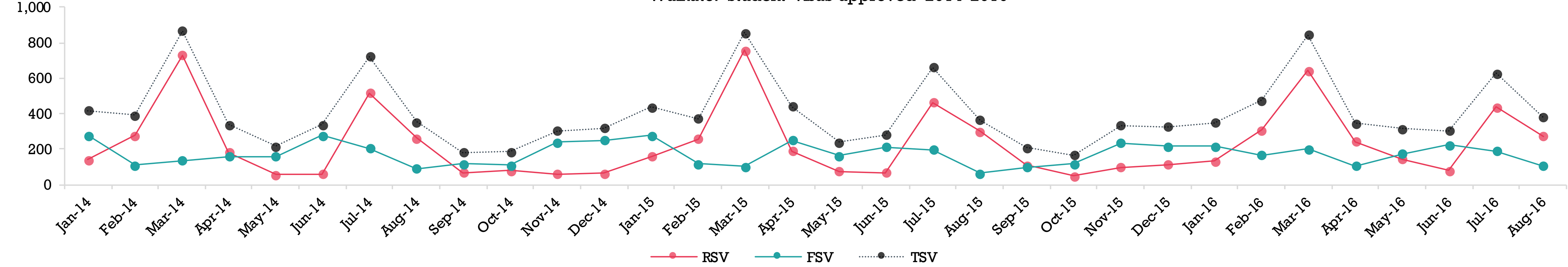
- Taranaki's TSVs decreased by 10% (-64). This driven by FSVs (-12%, -26) and RSVs (-9%, -38).
- TSV decreased for all sectors apart from schools, which increased by 41% (+26).

Waikato:

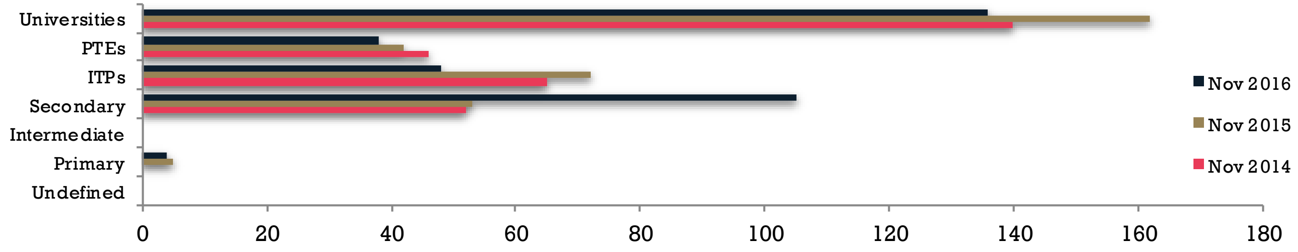
YTD (November)

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
-15	-15%	12	5%	-3	-1%	24	1%	61	3%	85	2%

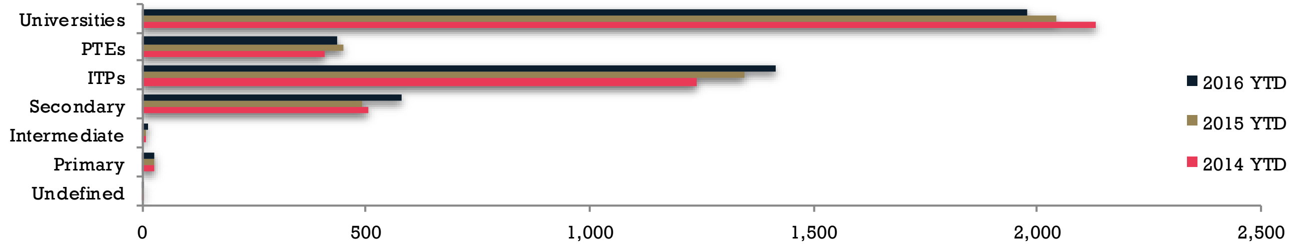
Waikato: student visas approved 2014-2016



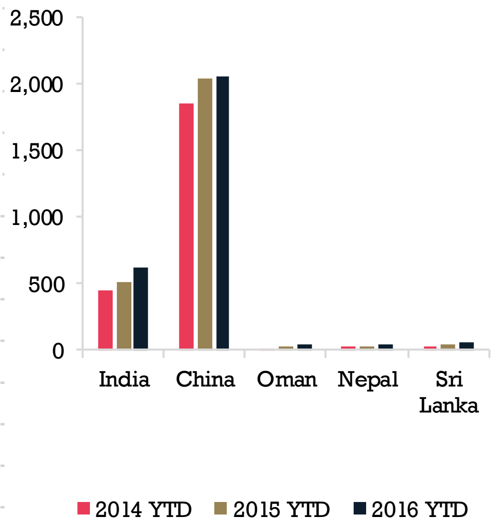
Waikato: Total student visas approved by sector, November



Waikato: Total student visas approved by sector, YTD



Waikato: YTD top five market shifts (TSVs)



Top FSV shifts

November FSV	Change	%change
Japan	27	142%
France	5	500%
Germany	4	100%
Canada	-5	-83%
UK	-5	-33%
Brazil	-7	-100%

FSVs YTD	Change	%change
India	66	21%
Japan	29	35%
Oman	22	220%
Tonga	-10	-83%
Brazil	-16	-40%
China	-46	-7%

Key takeaways:

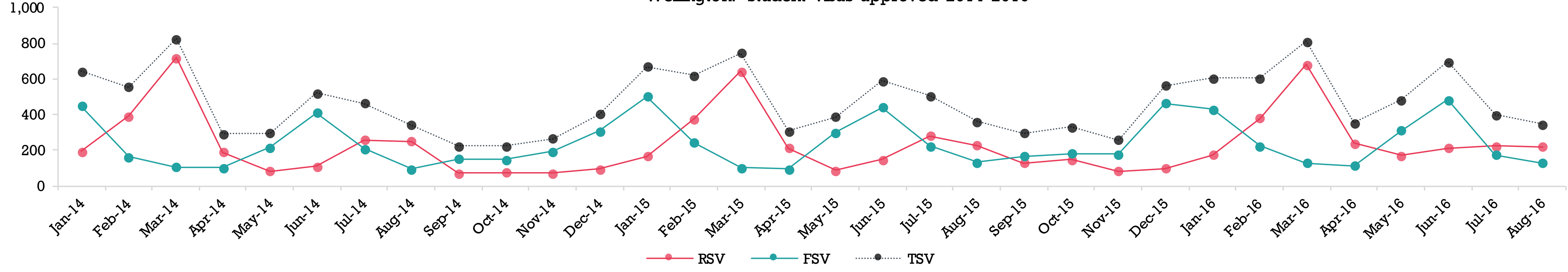
- Overall results for the Waikato region are stable YTD (+2%, +85). Both FSV (+3%, +61) and RSV (+1%, +24)
- TSVs for Schools and ITPs have both increased YTD, while PTEs and ITPS have decreased.

Wellington:

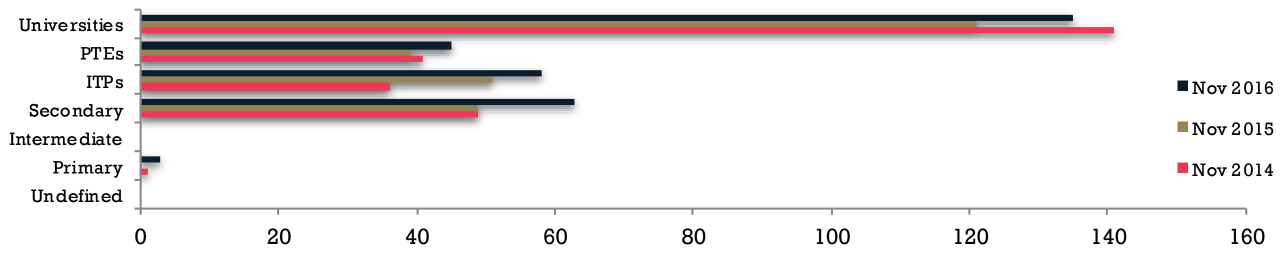
YTD (November)

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
6 7%	38 21%	44 17%	212 8%	-28 -1%	184 4%

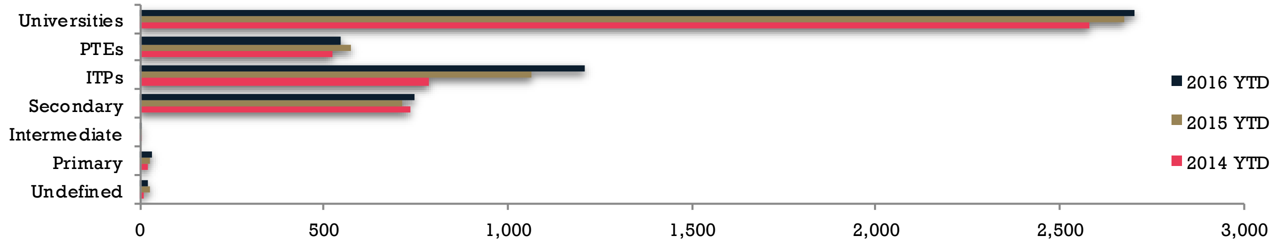
Wellington: student visas approved 2014-2016



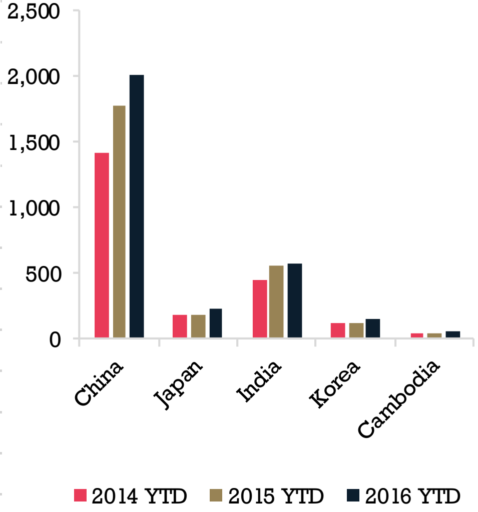
Wellington: Total student visas approved by sector, November



Wellington: Total student visas approved by sector, YTD



Wellington: YTD top five market shifts (TSVs)



Top FSV shifts

November FSV	Change	%change
Laos	15	250%
Cambodia	13	433%
China	9	28%
Pakistan	-4	-100%
Taiwan	-6	-100%
Myanmar	-9	-100%

FSVs YTD	Change	%change
Japan	41	32%
China	28	5%
Thailand	22	47%
Brazil	-24	-26%
India	-36	-10%
USA	-62	-20%

Key takeaways:

- An increase in RSV YTD (+8%; +212), is driving Wellington's results up compared to the same period last year (+4%, +184).
- The growth in TSV YTD is being felt mainly in the ITP sector, up 14% (+147), although all sectors apart from PTE have grown.