

Overall student visa trends October 2016



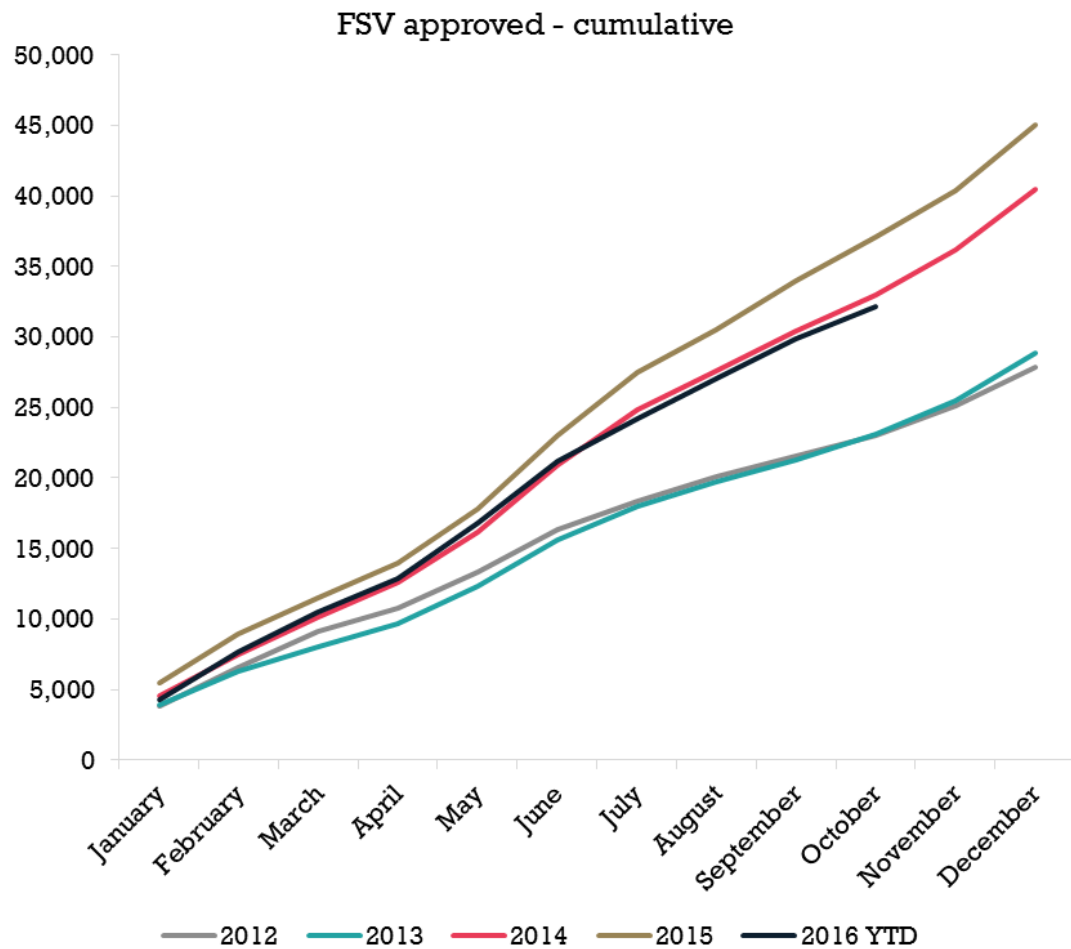
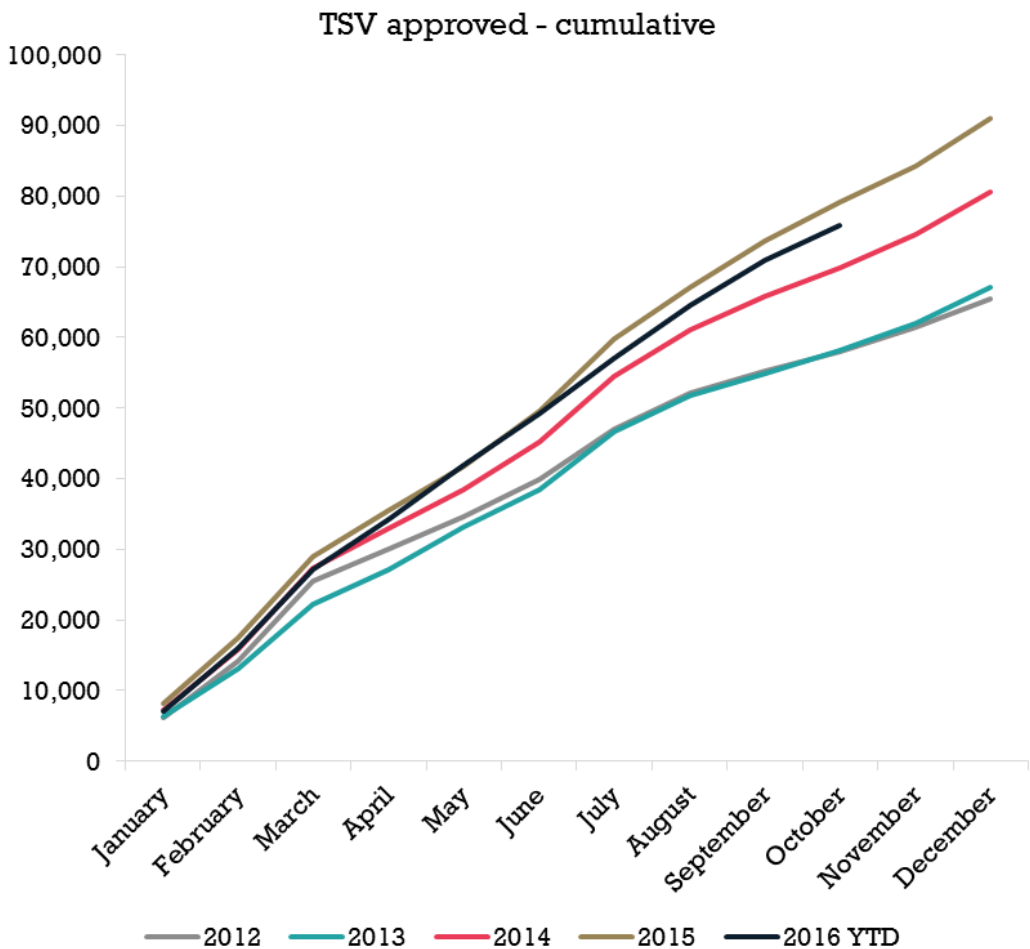
- Education New Zealand's (ENZ) four-year Excellence Horizon 2016-2020 Plan includes a 'Step change in information provision'.
- As part of this, over the next couple of months ENZ will review its intelligence products, test different formats and trend comparisons and determine the best way to present 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 Immigration New Zealand (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 Ministry of Education (MoE) and INZ to improve our data-sharing arrangements and the way data is collected on international students to more accurately reflect the industry.

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 countries) 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 and plan on taking up this option are also not included in this dashboard
 - These factors will impact 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 application criteria: dependants, applicants under Section 61, and Variation of Conditions. Dashboards prior to May 2015 include approvals from “all” applicants, including dependants.
4. SE Asia, Latin America, Middle East and Europe in the *Trends by market* section include the following countries.
 - SE Asia: Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.
 - Latin America: 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 and Honduras.
 - Middle East: Bahrain, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Oman, Palestine, Qatar, Saudi Arabia, Syria, United Arab Emirates and Yemen.
 - Europe: Austria, Belarus, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, UK, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Luxembourg, Lithuania, Macedonia, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Serbia & Montenegro, Slovakia, Spain, Sweden, Switzerland, Turkey, Ukraine, Yugoslavia, Kosovo, Armenia, Bosnia & Herzegovina, Albania, Andorra, Cyprus and Slovenia.

1. Current year-to-date (YTD) figures show that total student visas (TSV) are down -4% (-3,123), first time student visas (FSV) are down -13% (-4,963) and returning student visas (RSV) are up +4% (+1,840).
2. The seasonal peak in TSV that is usually seen in July didn't manifest this year. However RSVs between April and October period are up 11% compared to the same time period in 2015.
3. In October 2016 TSV -9% (-464) were down. FSV decreased by -28% (-878) while RSV were up +18% (+414) compared to October 2015.
4. RSV YTD for India are up +13% and China is up +10% compared to the same time period in 2015.
5. India, the Philippines, Saudi Arabia and the USA 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 (-41%, -4,647).
 - Philippines was another country affected by changes to English Language requirements - evidenced by the decline in FSV approved YTD (-52%, -1,138).
 - Saudi Arabia saw -36% reduction in TSV approved YTD (-684). The number of visas issued for Saudi Arabia YTD is the lowest since 2007. Interestingly there have only been 6 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 -14% (-300), while FSV are down -18% (-323). The decrease in the USA market is artificial and caused by a processing bulge in early 2015. There has been an exponential increase in USA traffic to the StudyinNewZealand website, and 30% of those visiting have gone to education institutions websites, well above the norm of 7%.
6. China has experienced +9% growth in TSV YTD (+2,324) which helped offset some of the decline from India.
7. China is up +473, while Japan and Malaysia 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 Korea, Indonesia, Taiwan and Viet Nam.

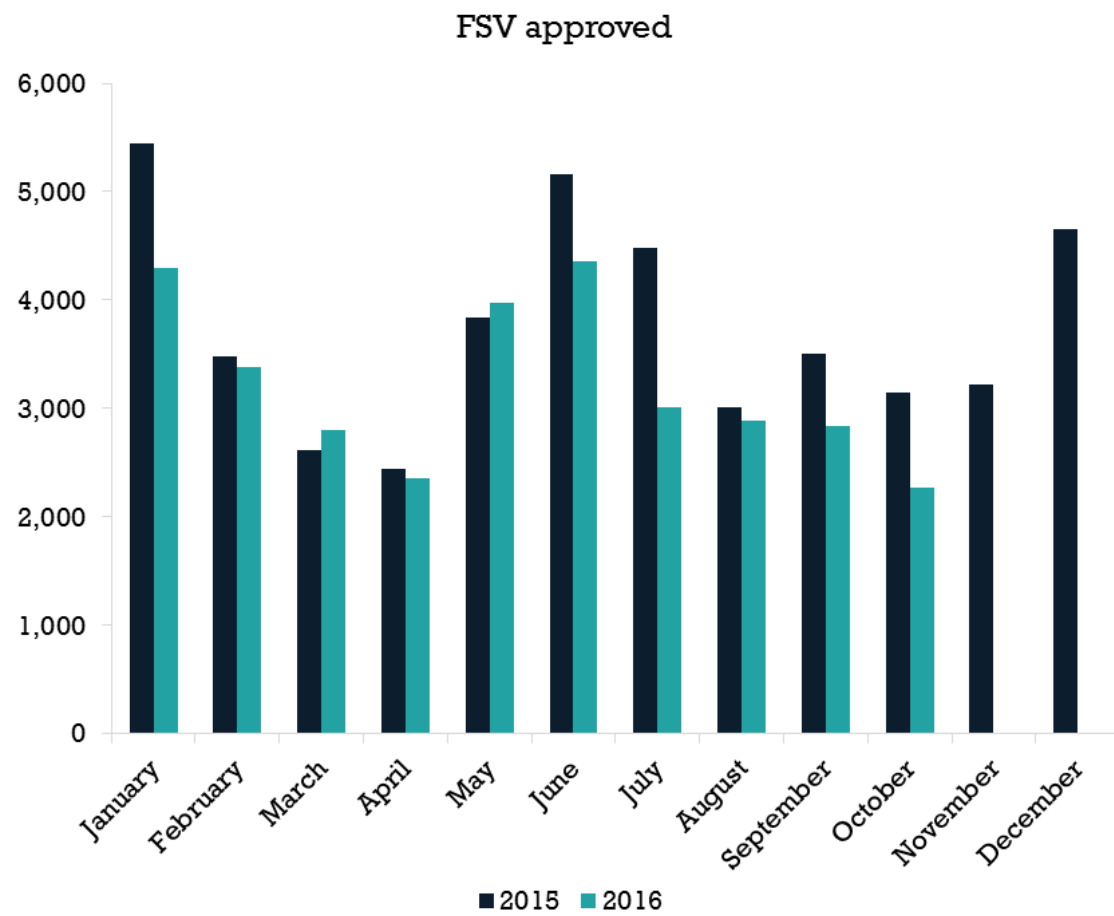
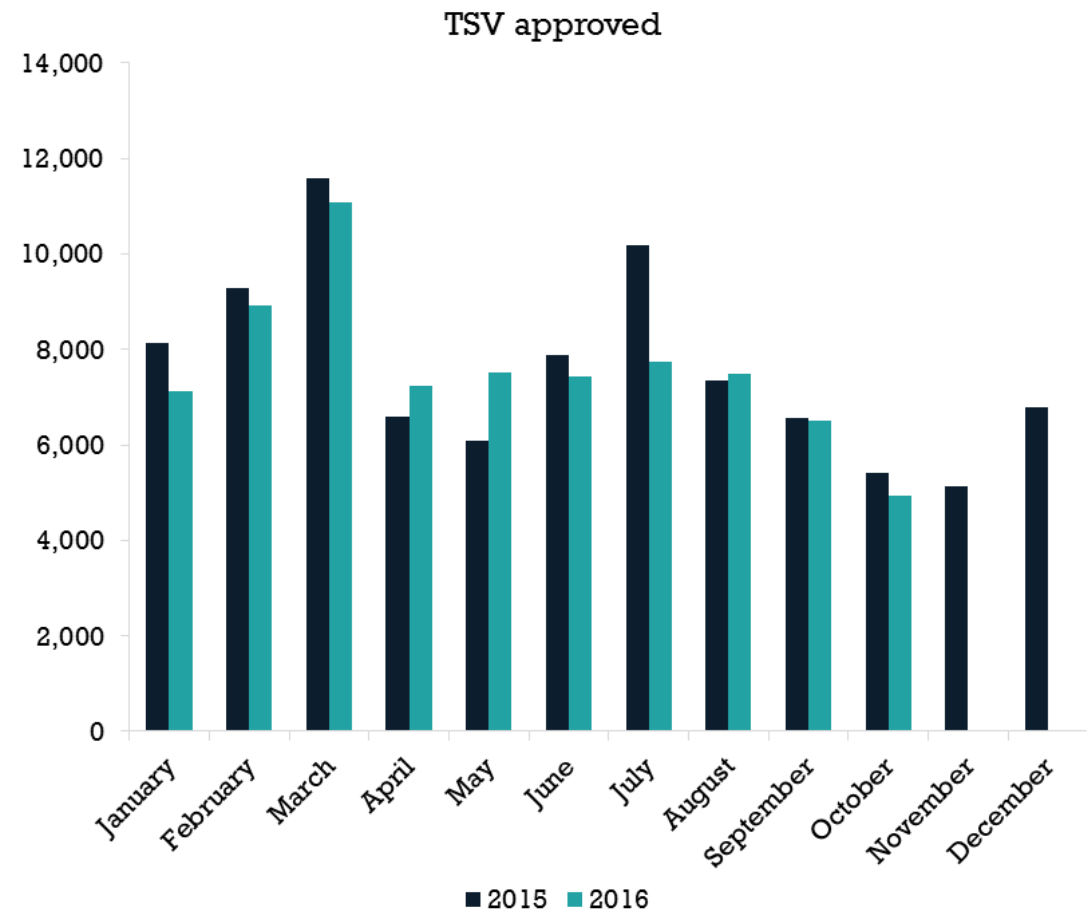
Comparison to previous years (cumulative)

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- TSVs approved are down (-4%) compared to the same period last year, with 75,955 TSV approved in 2016 YTD compared to 79,078 in 2015 YTD.
- A drop in FSV from India (-4,647) and the Philippines (-1,138) has led the decline in FSV YTD.
- Overall FSV are down -13% (-4,963) from 2015 YTD. 32,161 were approved in 2016 YTD compared to 37,124 in 2015 YTD.
- While there is a decline in TSV and FSV YTD (-4%, -13%), students choosing to renew their visas (RSV) are up +4% with an additional 1,840 students visas approved compared to the same time period last year.

Month-on-month comparison to previous year



- October 2016 TSV (-9%, -464) declined compared to October 2015.
- FSV for October 2016 were down (-28%, -878) compared to October 2015. The decrease in FSV has been partially offset by the increase in RSV (+18%, +414). However, RSV numbers may have been partially inflated due to visa processing issues.

Trends by market

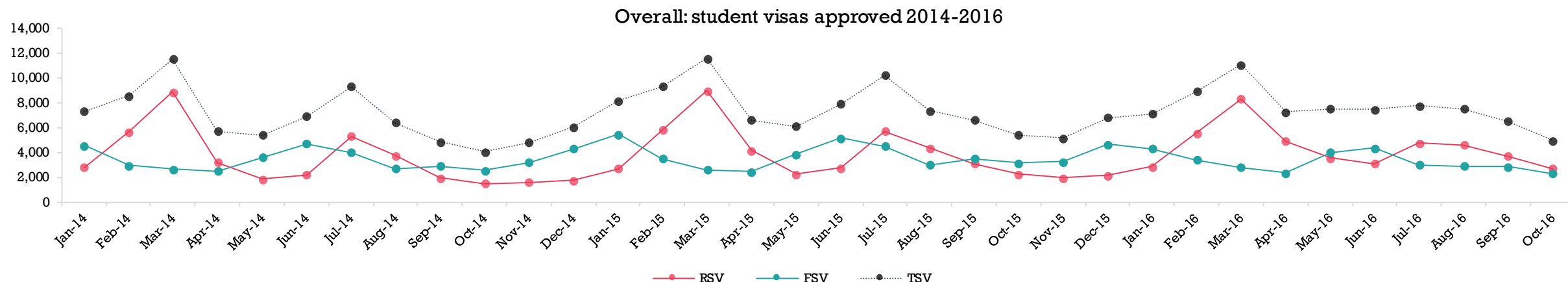


Overall

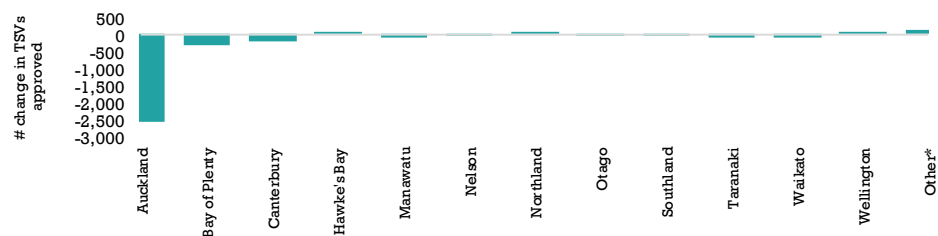
October RSV	October FSV	October TSV
414 ↑ 18%	-878 ↓ -28%	-464 ↓ -9%

YTD RSV	YTD FSV	YTD TSV
1,840 ↑ 4%	-4,963 ↓ -13%	-3,123 → -4%

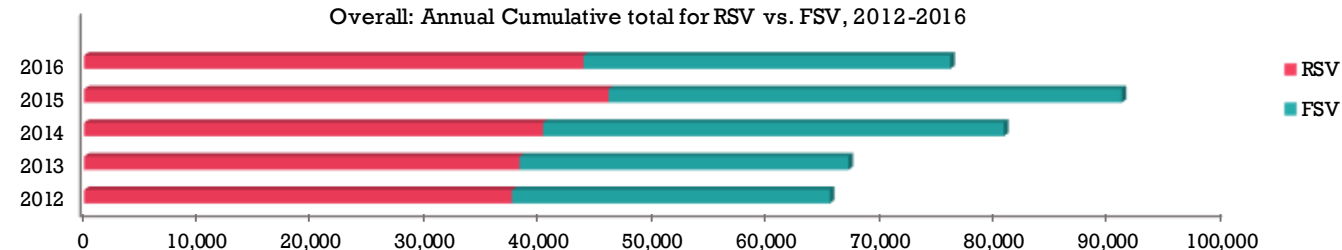
YTD (October)



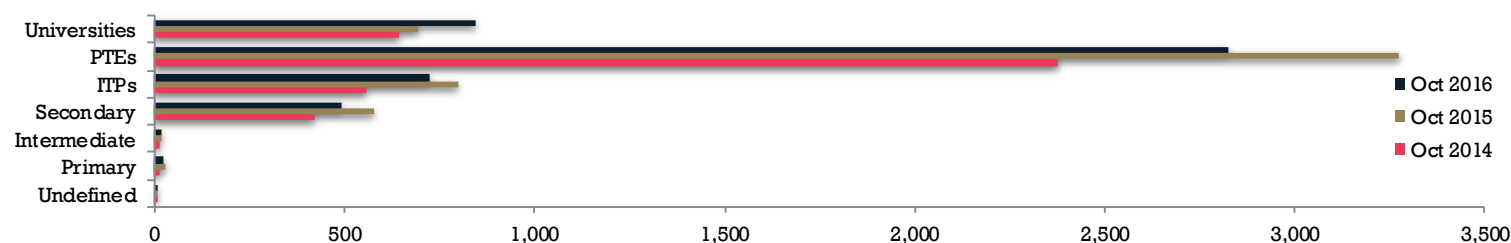
Overall: 2016 YTD TSV regional change



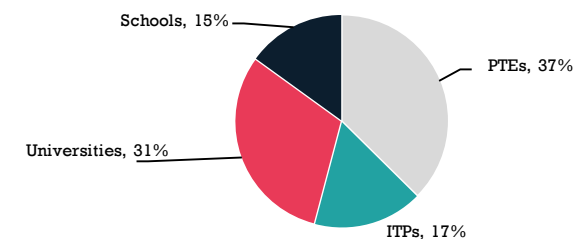
Overall: Annual Cumulative total for RSV vs. FSV, 2012-2016



Overall: Total student visas approved by sector, October



Overall: 2016 YTD Sector breakdown of TSV



Key takeaways:

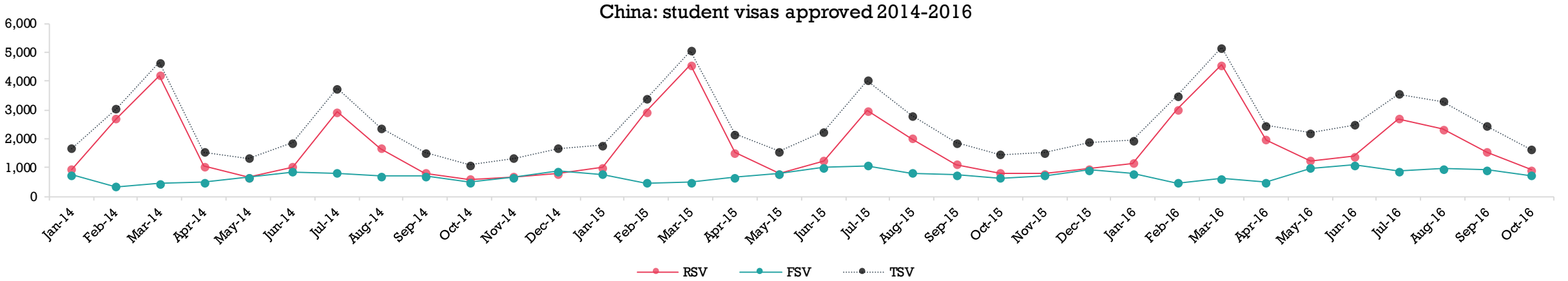
- Current YTD figures show that total student visas (TSV) are down (-4%) and first time student visas (FSV) are down -13%. However, returning student visas (RSV) are up (+4%) YTD.
- October 2016 experienced a -9% decrease for TSV (-464) driven by an decrease in FSV -28% (-878) compared to October 2015.
- The university sector saw the only increase in TSV (+22%) approved for October 2016, with both RSV and FSV increasing.

China

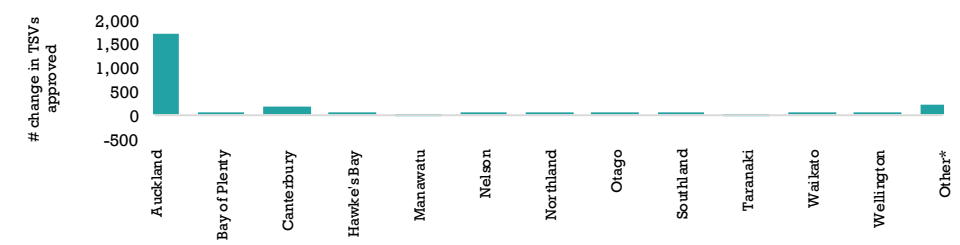
October RSV	October FSV	October TSV
100 ↑ 12%	84 ↑ 13%	184 ↑ 13%

YTD RSV	YTD FSV	YTD TSV
1,851 ↑ 10%	473 ↑ 6%	2,324 ↑ 9%

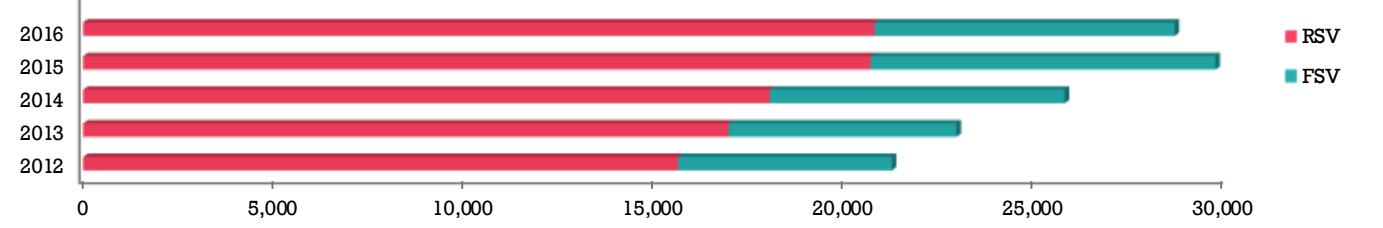
YTD (October)



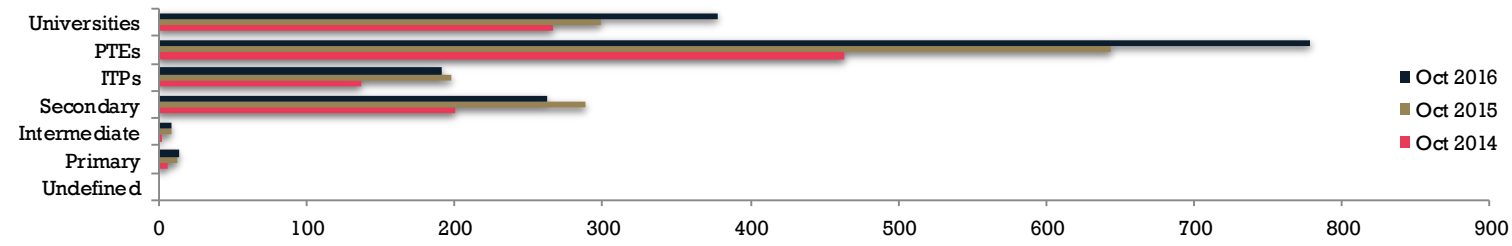
China: 2016 YTD TSV regional change



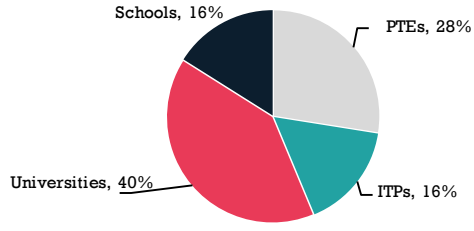
China: Annual Cumulative total for RSV vs. FSV, 2012-2016



China: Total student visas approved by sector, October



China: 2016 YTD Sector breakdown of TSV

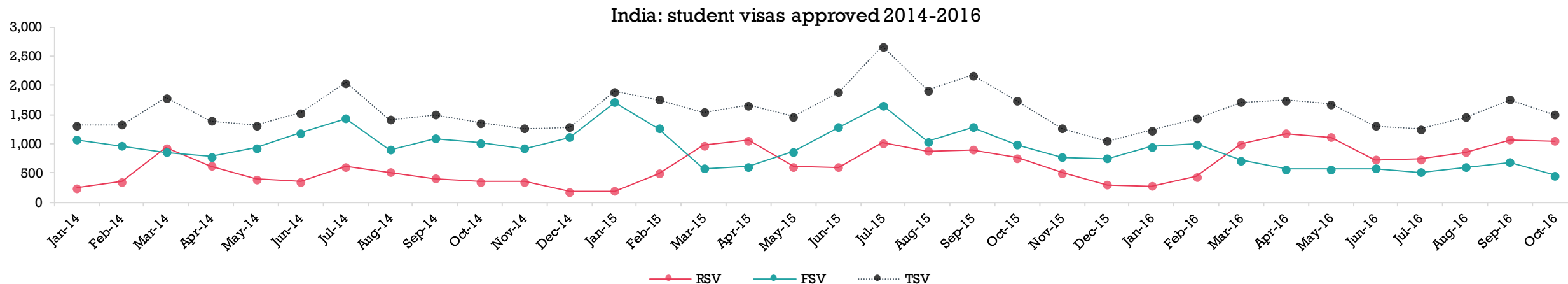


- Key takeaways:
- TSV approved for China has increased by 9% YTD (+2,324). This is being driven by a 10% increase in RSV (+1,851) and FSV are also up +6% (+473).
 - October 2016 saw an increase in TSV, +13% (+184) which was driven by RSV for October +12% (+100) compared to October 2015.
 - 40% of TSV approvals from China have been in the university sector followed by PTE sector with 28% YTD.

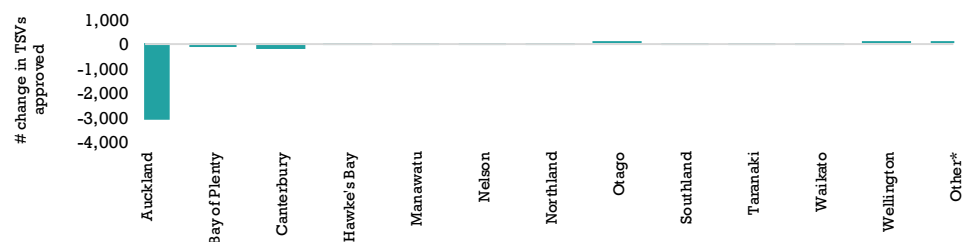
October RSV	October FSV	October TSV
286 ↑ 38%	-521 ↓ -53%	-235 ↓ -14%

YTD RSV	YTD FSV	YTD TSV
988 ↑ 13%	-4,647 ↓ -41%	-3,659 ↓ -20%

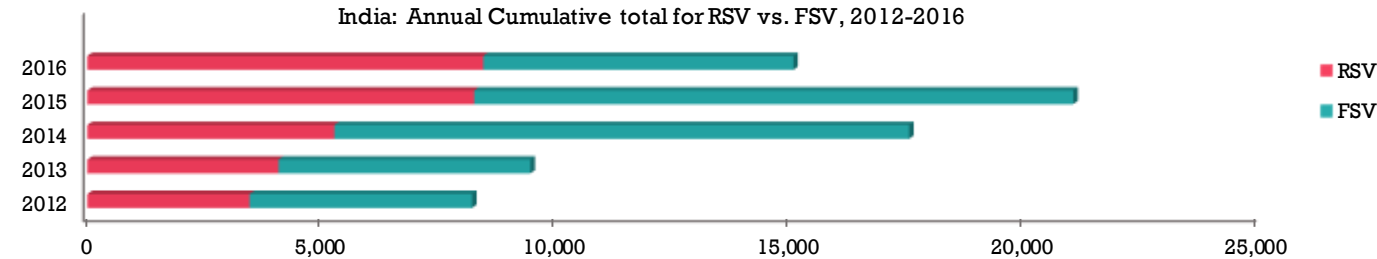
YTD (October)



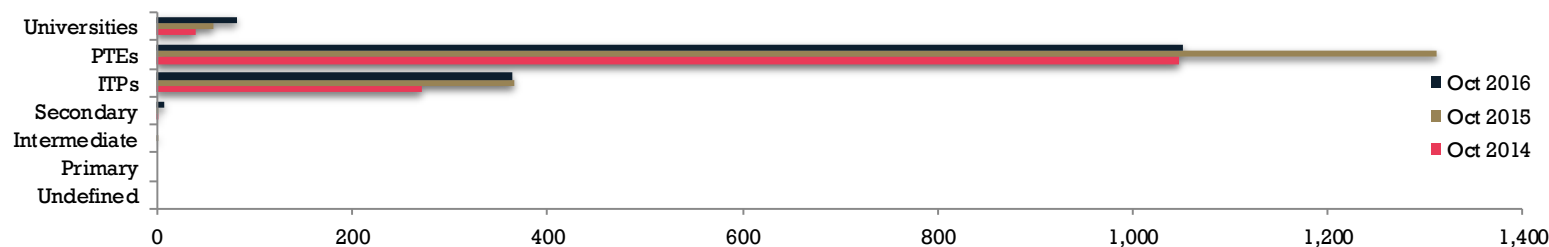
India: 2016 YTD TSV regional change



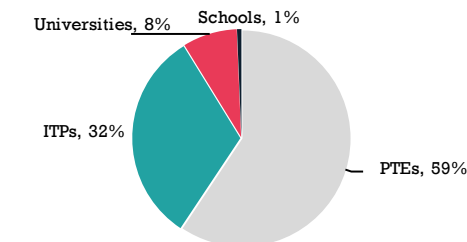
India: Annual Cumulative total for RSV vs. FSV, 2012-2016



India: Total student visas approved by sector, October



India: 2016 YTD Sector breakdown of TSV



Key takeaways:

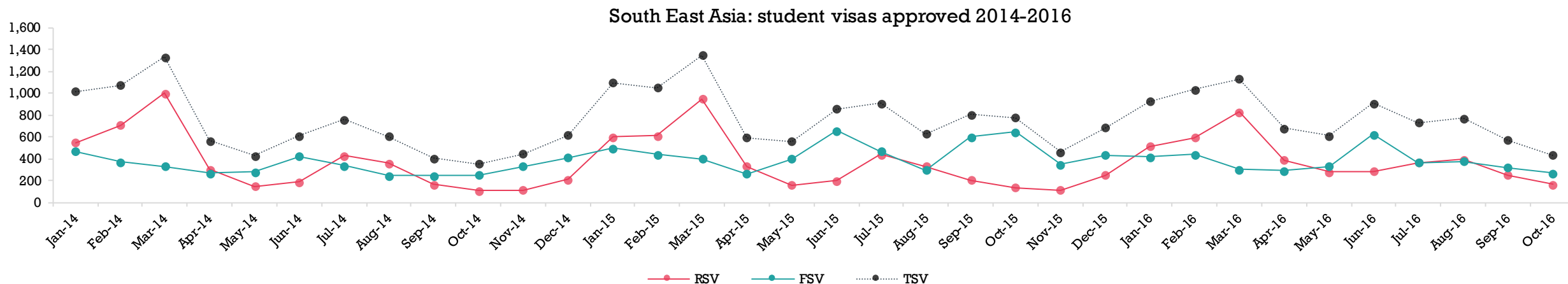
- YTD results for India continue to be much lower than the same period last year, with TSV down -20% (-3,659). This is being driven by a -41% (-4,647) decline in FSV to date, following the change in English language requirements (Rule 18) in October 2015.
- However India is experiencing an increase in RSV YTD (+13%, +988) suggesting students are choosing to return/remain in New Zealand to study.

South East Asia:

October RSV	October FSV	October TSV
33 ↑ 25%	-376 ↓ -58%	-343 ↓ -44%

YTD RSV	YTD FSV	YTD TSV
97 → 2%	-936 ↓ -20%	-839 ↓ -10%

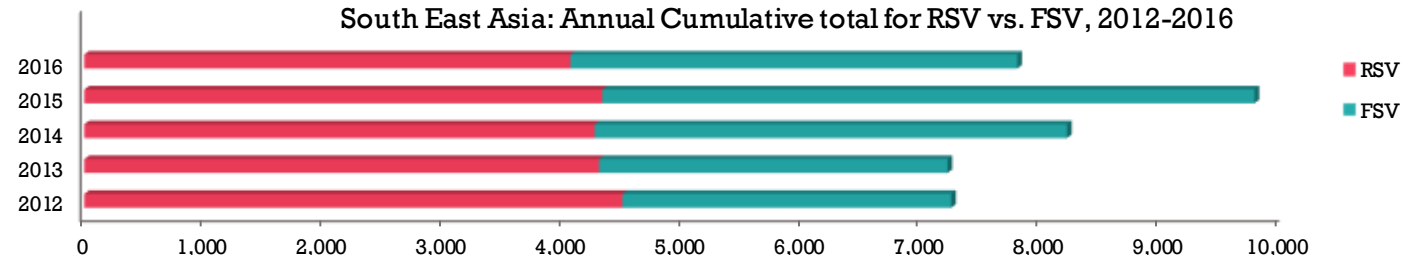
YTD (October)



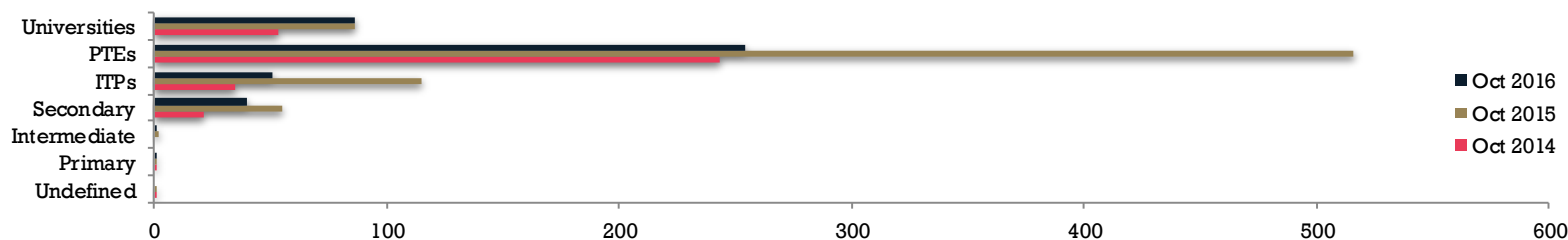
South East Asia: 2016 YTD TSV regional change



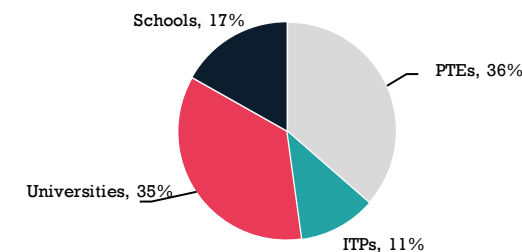
South East Asia: Annual Cumulative total for RSV vs. FSV, 2012-2016



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



South East Asia: 2016 YTD Sector breakdown of TSV



Key takeaways:

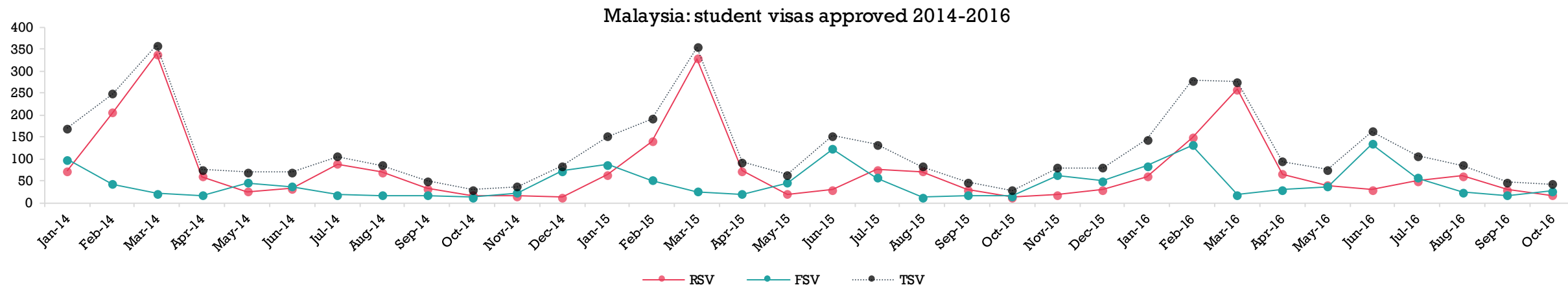
- TSV for the South East Asia region are down YTD (-10%, -839). While FSV are still down (-20%, -936), RSV have appeared to stabilise (+2%, +97).
- October 2016 TSV saw a downturn of -44% (-343) compared with October 2015. This is being driven by the decrease in FSV of -58% (-376), which is partially being offset by a +25% (+33) increase in RSV.
- The decline in the region is being driven by the decline in FSV (-52%, -1,138) approved from the Philippines, which was affected by the changes in English Language requirements.

Malaysia

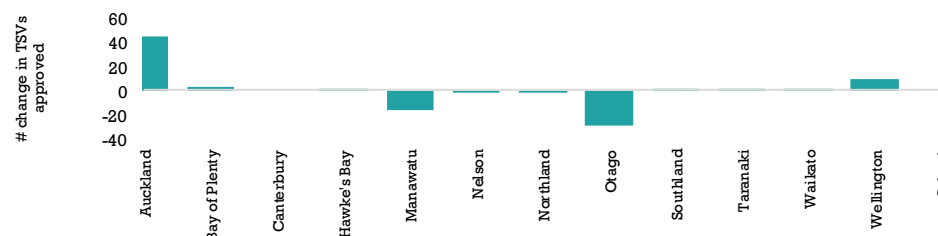
October RSV	October FSV	October TSV
4 ↑ 31%	11 ↑ 73%	15 ↑ 54%

YTD RSV	YTD FSV	YTD TSV
-86 ↓ -10%	104 ↑ 23%	18 → 1%

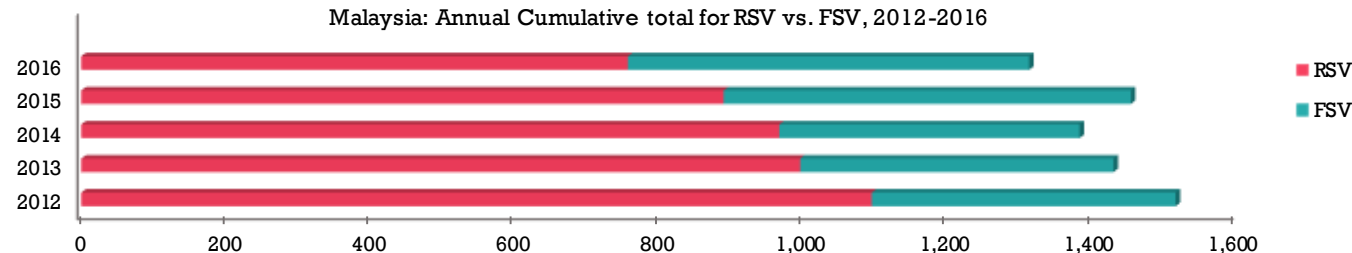
YTD (October)



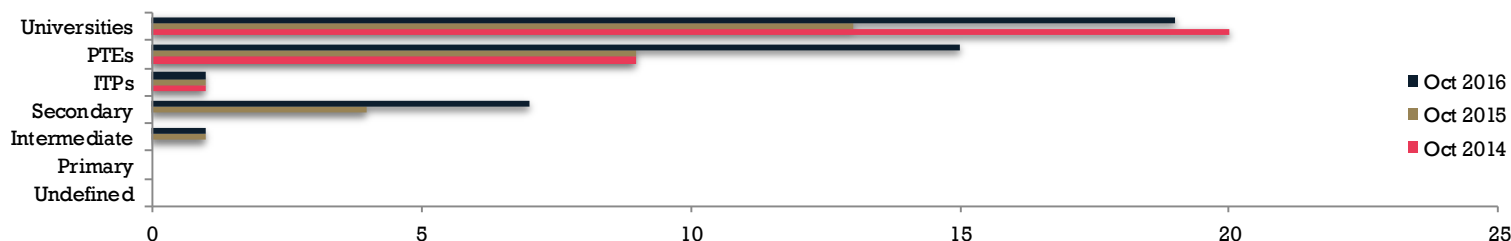
Malaysia: 2016 YTD TSV regional change



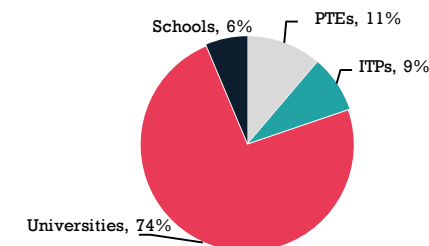
Malaysia: Annual Cumulative total for RSV vs. FSV, 2012-2016



Malaysia: Total student visas approved by sector, October



Malaysia: 2016 YTD Sector breakdown of TSV



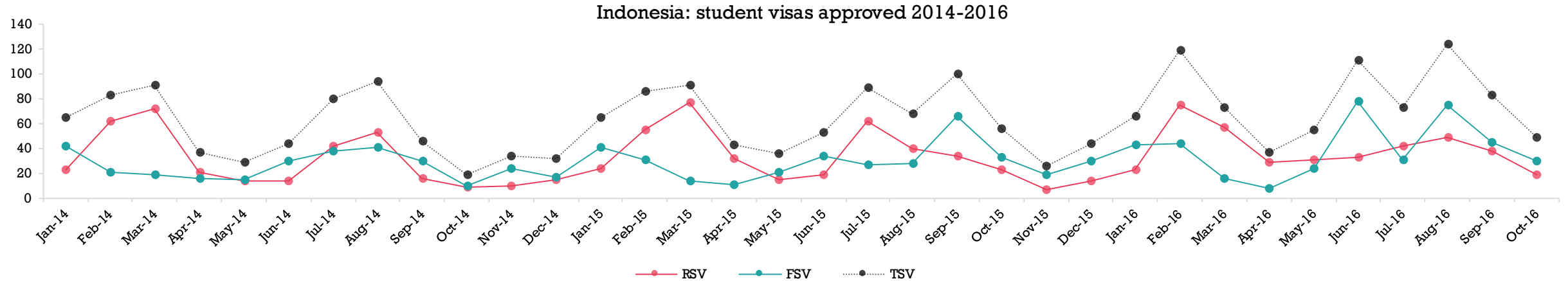
Key takeaways:

- TSV approved for Malaysia remains stable YTD. Although an increase was seen in FSV (+23%, +104), this was offset by a decline in RSV (-10%, -86).
- October 2016 saw good growth in FSV up +73% (+11) and RSV up +31% (+4) compared to October 2015.
- The university sector made up the majority of TSV approved YTD (74%).

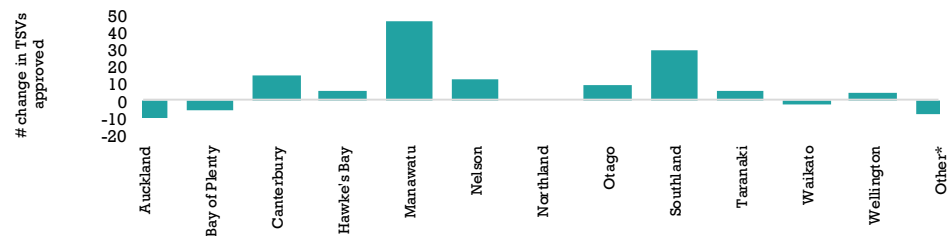
Indonesia



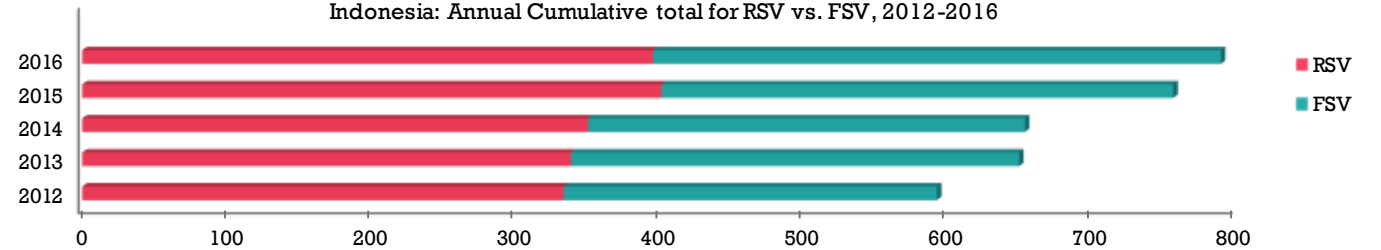
YTD (October)



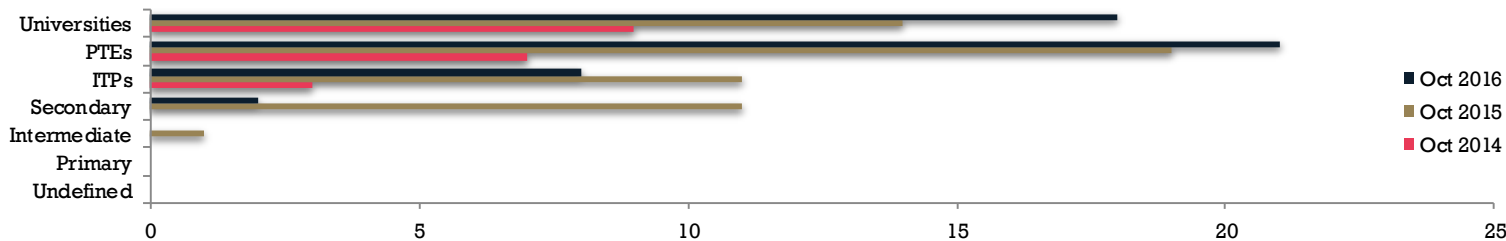
Indonesia: 2016 YTD TSV regional change



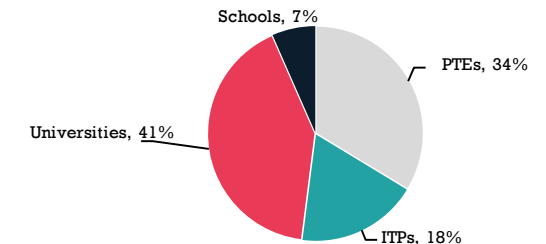
Indonesia: Annual Cumulative total for RSV vs. FSV, 2012-2016



Indonesia: Total student visas approved by sector, October



Indonesia: 2016 YTD Sector breakdown of TSV

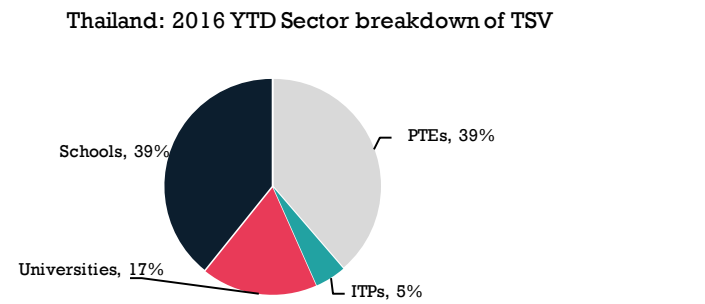
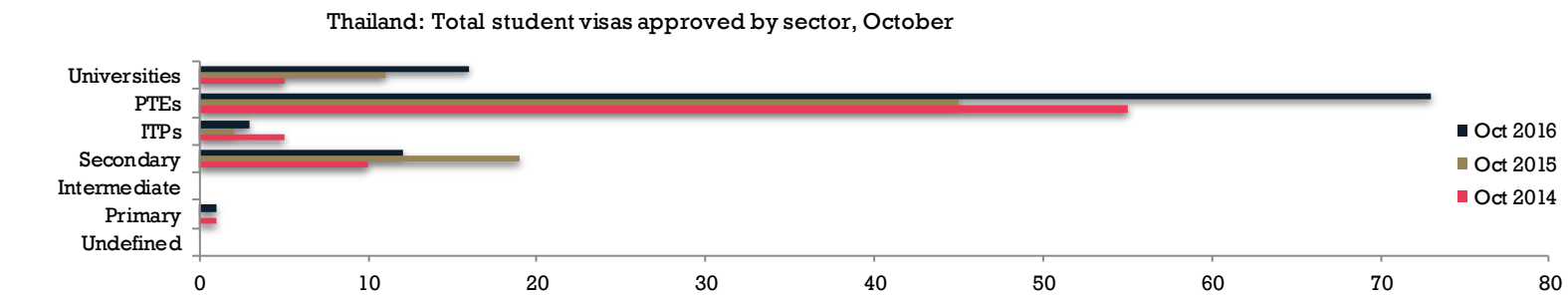
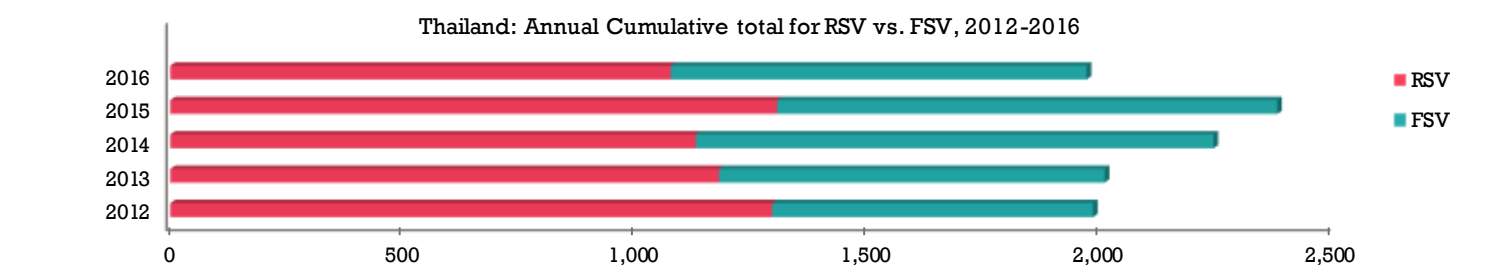
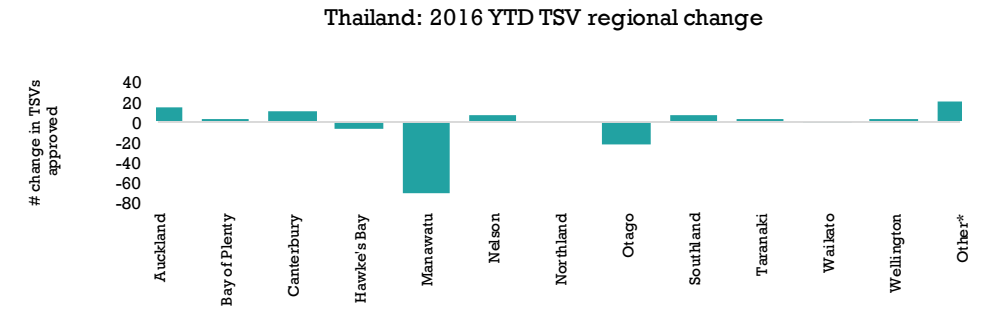
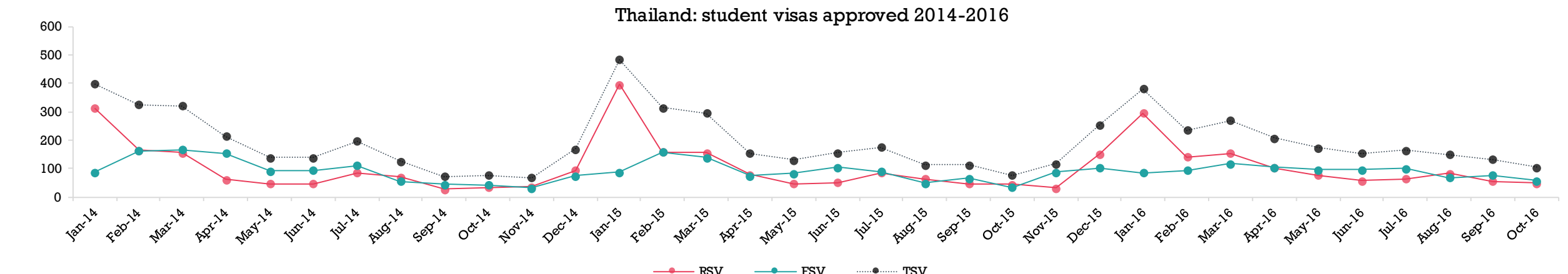


Key takeaways:

- Results for Indonesia are positive YTD, with TSV up +15% (+103). This is being driven by FSV (+29%) while RSV has moderately increased (+4%).
- The university sector comprises 41% of TSV YTD followed by the PTE sector with 34%.
- The increase in TSV YTD is evident in the Manawatu, Southland and Canterbury regions in particular.

October RSV	October FSV	October TSV
4 ↑ 9%	24 ↑ 73%	28 ↑ 36%

YTD RSV	YTD FSV	YTD TSV
-47 ↓ -4%	9 → 1%	-38 → -2%



Key takeaways:

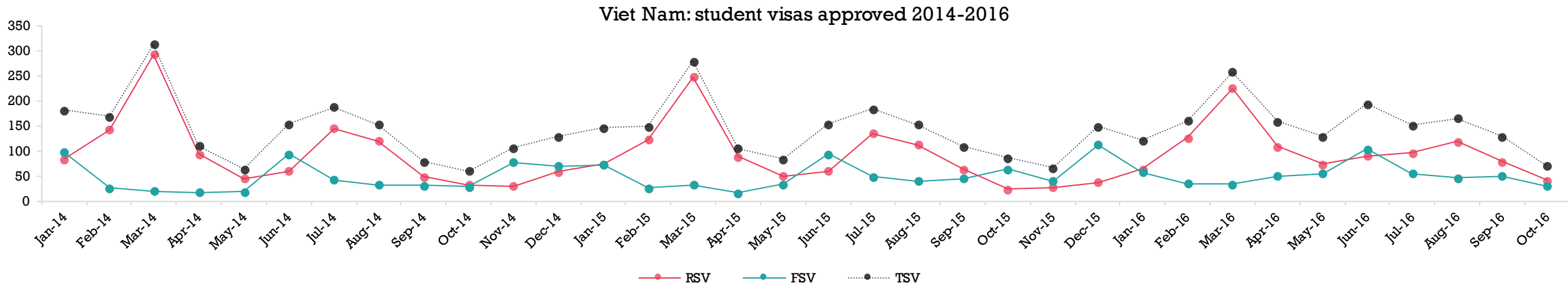
- October 2016 saw an increase in TSV for Thailand compared to October 2015 up +36% (+28). However YTD results continue to be lower than the same period last year (TSV down -2%, -38) driven by a reduction in RSV (-4%, -47).
- Both the school and PTE sectors accounted for 39% of TSV approved YTD. The Manawatu and Otago region have experienced a decline in Thai student visas in 2016.

Viet Nam

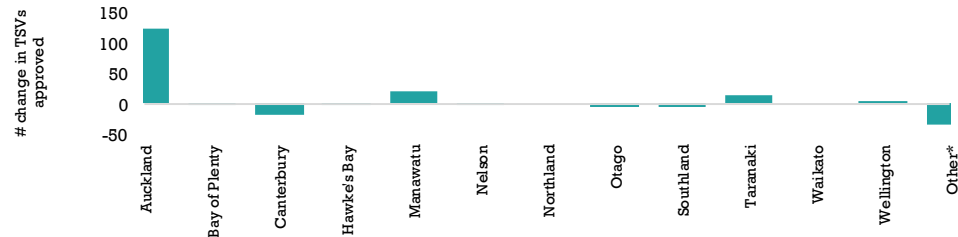
October RSV	October FSV	October TSV
18 ↑ 78%	-34 ↓ -54%	-16 ↓ -19%

YTD RSV	YTD FSV	YTD TSV
46 ↑ 5%	43 ↑ 9%	89 ↑ 6%

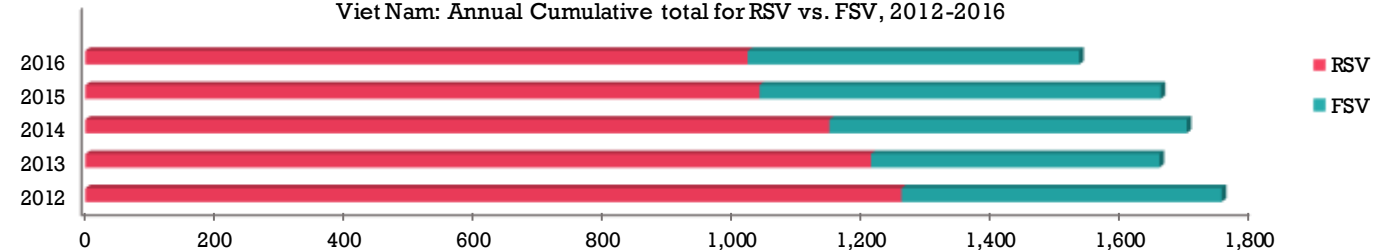
YTD (October)



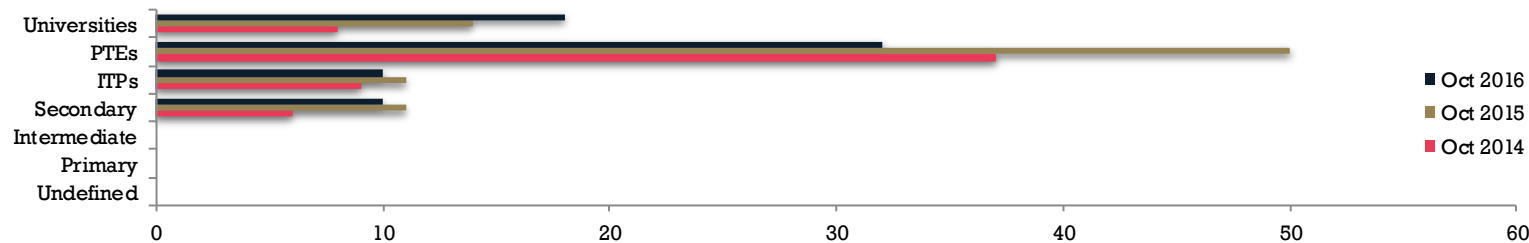
Viet Nam: 2016 YTD TSV regional change



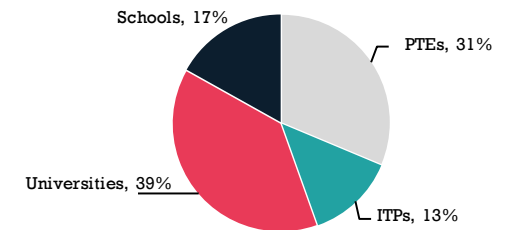
Viet Nam: Annual Cumulative total for RSV vs. FSV, 2012-2016



Viet Nam: Total student visas approved by sector, October



Viet Nam: 2016 YTD Sector breakdown of TSV



Key takeaways:

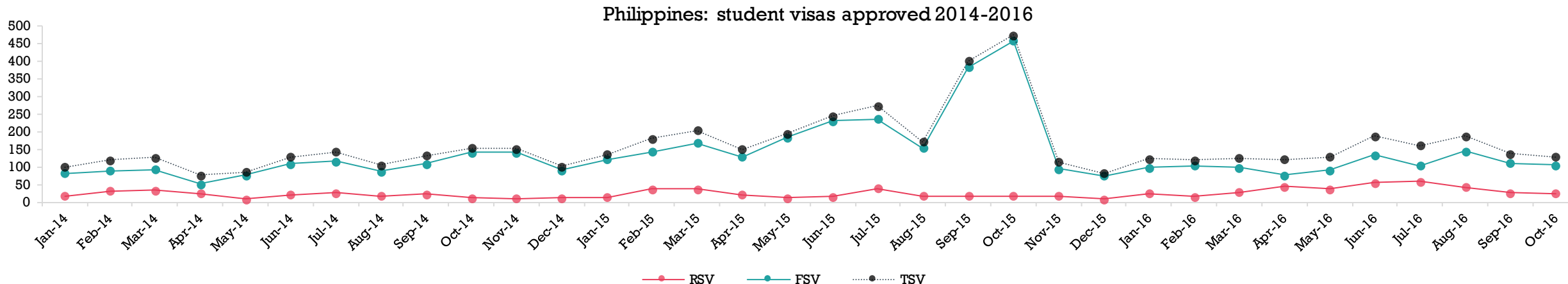
- Viet Nam is tracking well YTD with TSV up (+6%, +86) and FSV up (+9%, +43) however TSVs for the month were down (-19%, -16) while FSV were up (+78%, +18) compared to October 2015.
- Thirty nine percent of TSV YTD approved were in the university sector and 31% in the PTE sector. The majority of the growth in the Vietnamese market is occurring in the Auckland region.

Philippines:

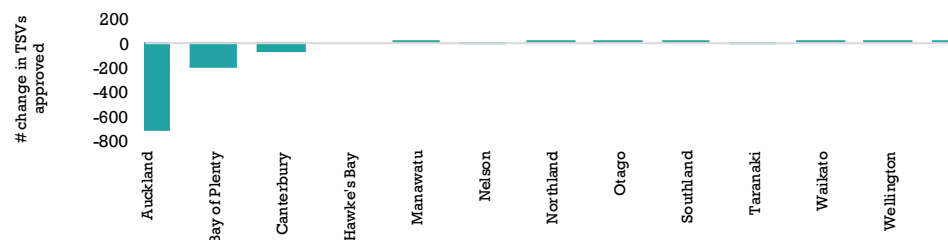
October RSV	October FSV	October TSV
7 ↑ 41%	-353 ↓ -77%	-346 ↓ -73%

YTD RSV	YTD FSV	YTD TSV
130 ↑ 58%	-1,138 ↓ -52%	-1,008 ↓ -42%

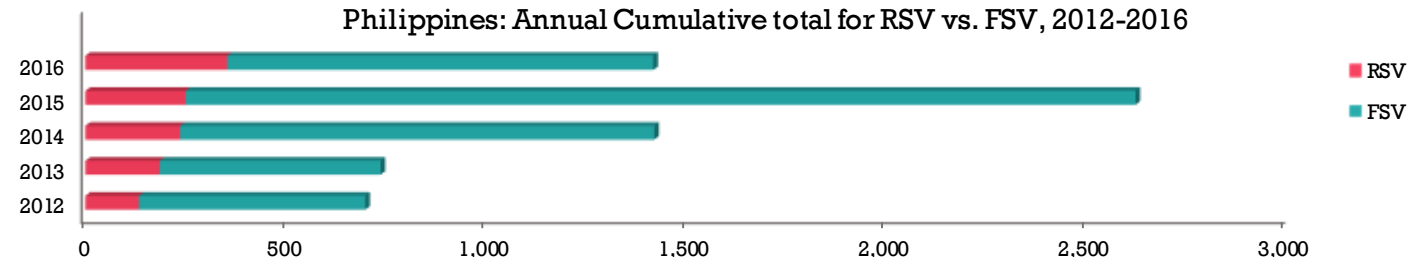
YTD (October)



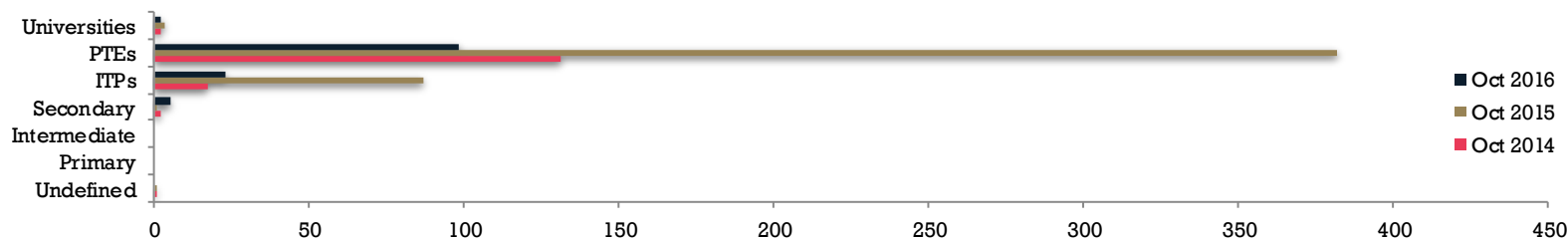
Philippines: 2016 YTD TSV regional change



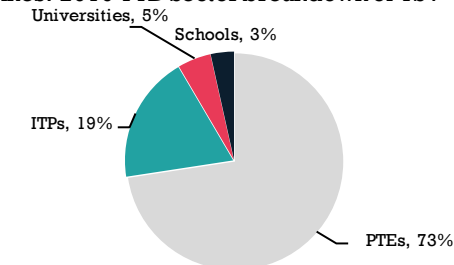
Philippines: Annual Cumulative total for RSV vs. FSV, 2012-2016



Philippines: Total student visas approved by sector, October



Philippines: 2016 YTD Sector breakdown of TSV



Key takeaways:

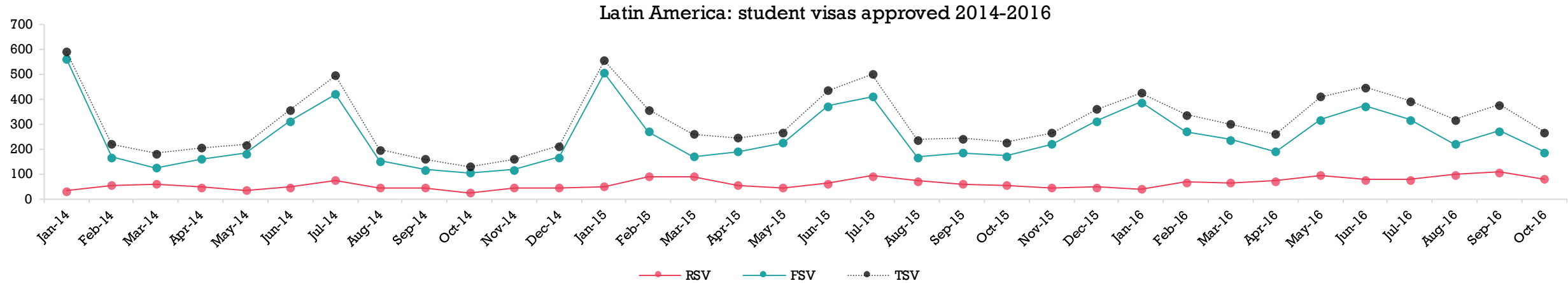
- FSV approved from the Philippines remain down YTD (-52%, -1,138), whilst RSV is up YTD (+58%, +130) partially softening the overall decline in TSV (-42%, -1,008). This decline follows an exceptional year of growth in 2015 that would be hard to match. The change in English language requirements (Rule 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 it is expected that there will be an increase in students studying towards degree and postgraduate studies.
- 97% of TSV approved were in the tertiary sector YTD.

Latin America

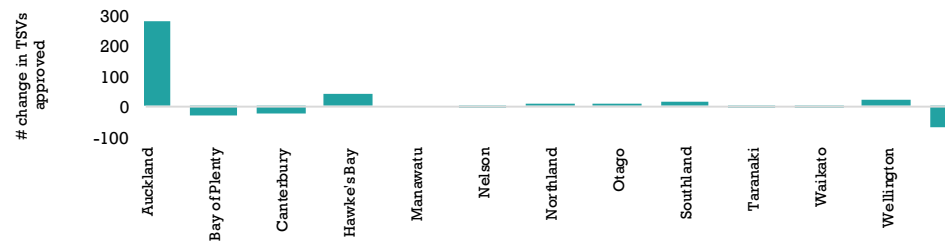
October RSV	October FSV	October TSV
24 ↑ 44%	14 ↑ 8%	38 ↑ 17%

YTD RSV	YTD FSV	YTD TSV
104 ↑ 16%	102 → 4%	206 ↑ 6%

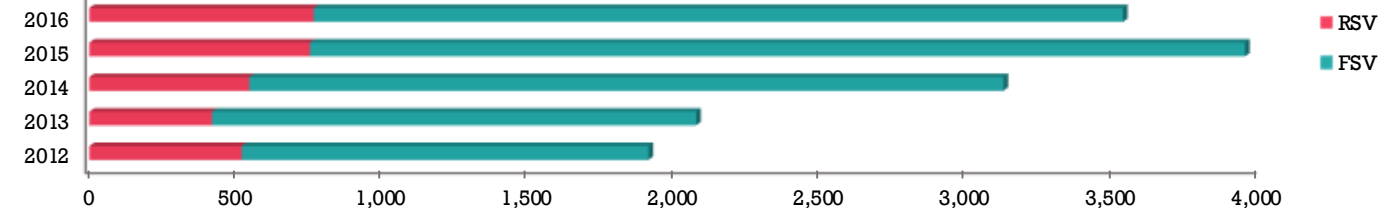
YTD (October)



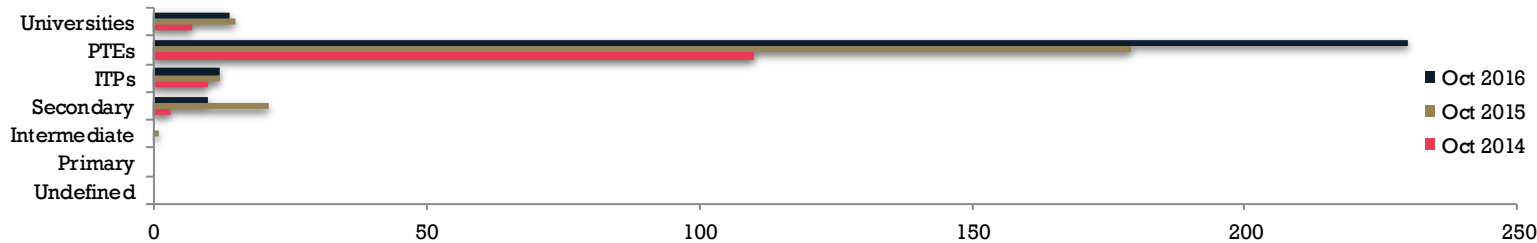
Latin America: 2016 YTD TSV regional change



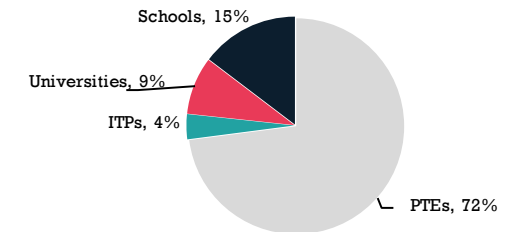
Latin America: Annual Cumulative total for RSV vs. FSV, 2012-2016



Latin America: Total student visas approved by sector, October



Latin America: 2016 YTD Sector breakdown of TSV



Key takeaways:

- The Latin America region TSV has increased YTD (+6%, +206). October 2016 saw a positive result with TSV up (+17%, +38), this was driven by an increase in RSV (+44%, +24) compared to October 2015.
- The PTE sector accounts for the majority of TSV approved YTD (72%), followed by the schools sector (15%).

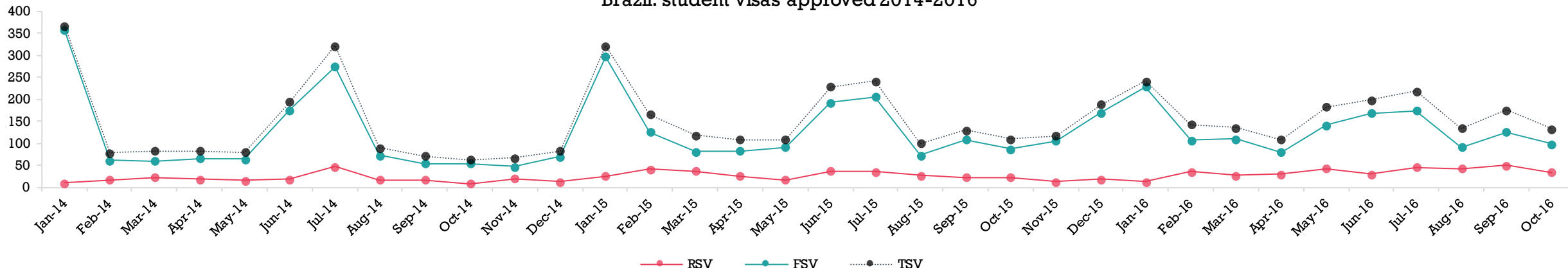
Brazil:

October RSV	October FSV	October TSV
12 ↑ 55%	11 ↑ 13%	23 ↑ 21%

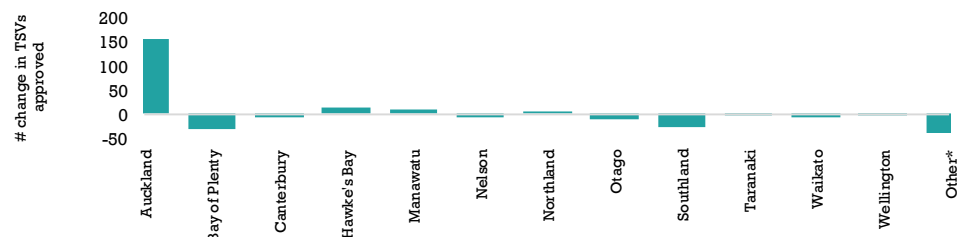
YTD RSV	YTD FSV	YTD TSV
61 ↑ 21%	-20 → -1%	41 → 3%

YTD (October)

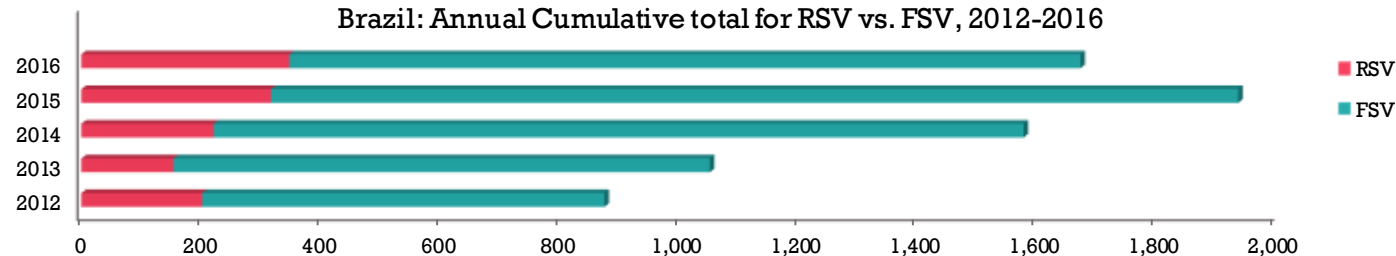
Brazil: student visas approved 2014-2016



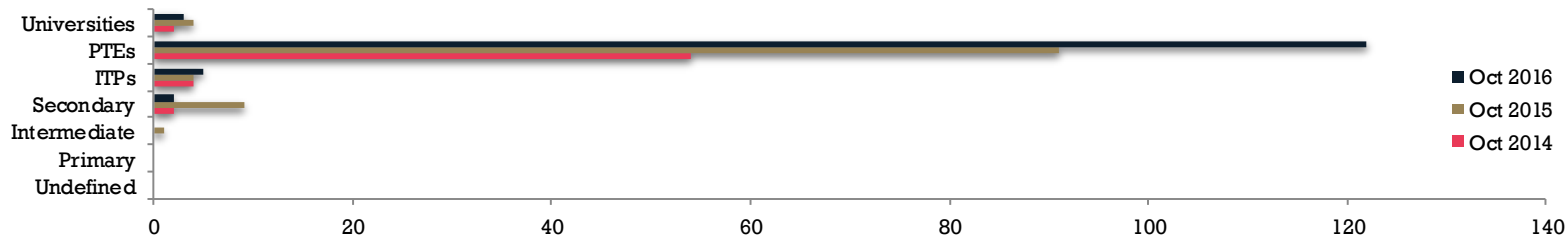
Brazil: 2016 YTD TSV regional change



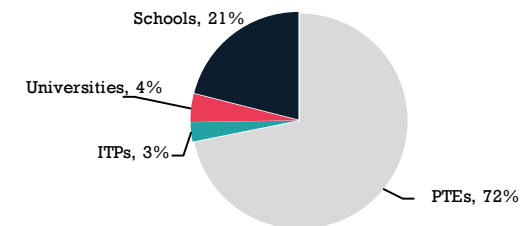
Brazil: Annual Cumulative total for RSV vs. FSV, 2012-2016



Brazil: Total student visas approved by sector, October



Brazil: 2016 YTD Sector breakdown of TSV

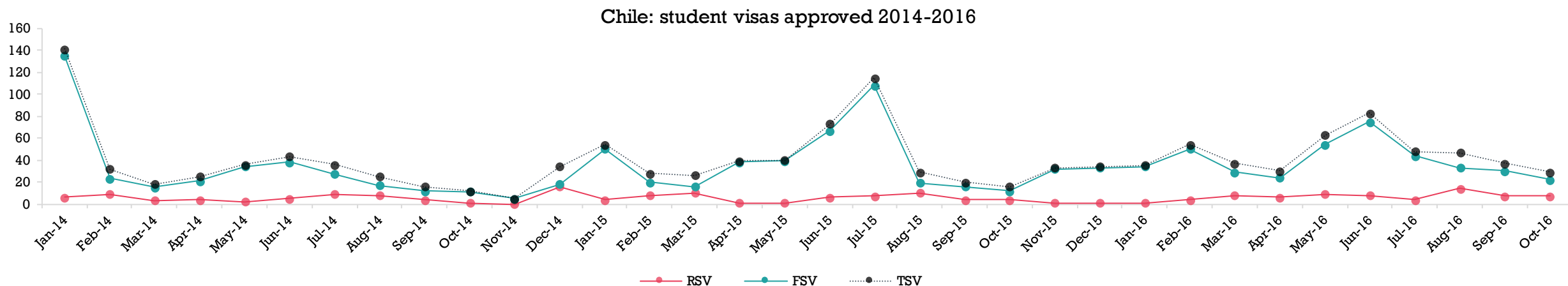


Key takeaways :

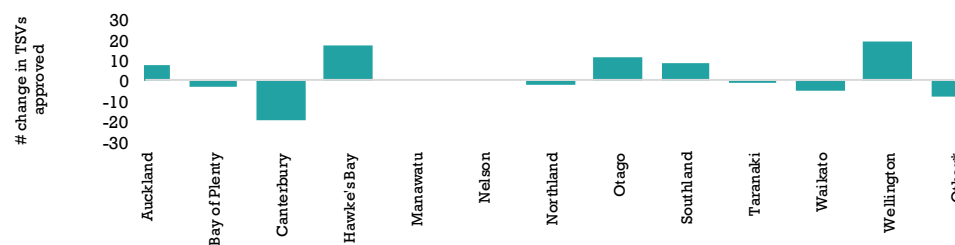
- Brazil TSV YTD are slightly up (+3%, +41) due to the increase in RSV YTD approved (+21%, +61). October 2016 results were up for both FSVs and RSVs (+13% and +55%) compared to October 2015.
- The Brazilian government-funded scholarship scheme 'Science Without Borders' (SWB) was put on hold in early 2015. 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 sector experienced growth in TSV approved for October 2016 compared to October 2015.

October RSV	October FSV	October TSV
3 ↑ 75%	10 ↑ 83%	13 ↑ 81%

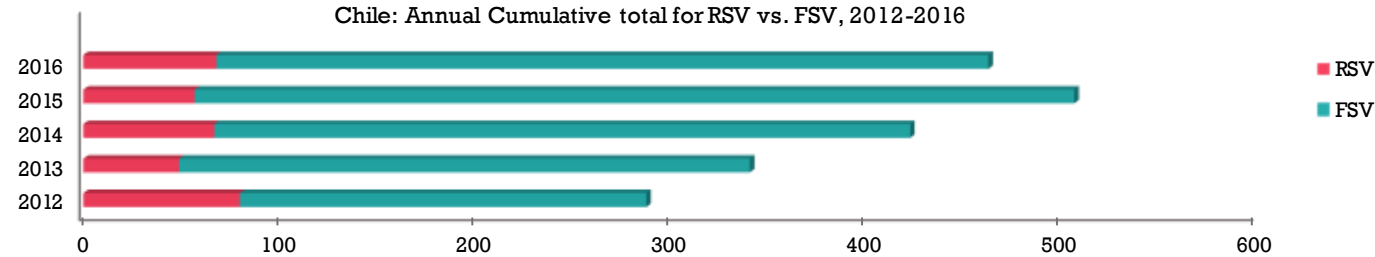
YTD RSV	YTD FSV	YTD TSV
13 ↑ 24%	10 → 3%	23 ↑ 5%



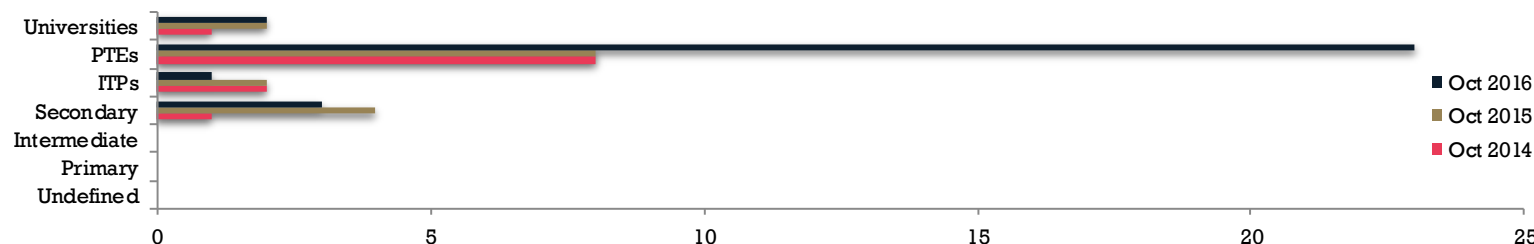
Chile: 2016 YTD TSV regional change



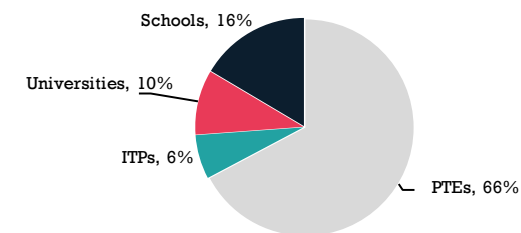
Chile: Annual Cumulative total for RSV vs. FSV, 2012-2016



Chile: Total student visas approved by sector, October



Chile: 2016 YTD Sector breakdown of TSV



Key takeaways:

- YTD TSV from Chile are up (+5%, +23) which is being driven by a +24% increase in RSV (+13).
- Hawke's Bay, Otago, Wellington and Southland have seen growth YTD.
- 66% of Chilean students are choosing to study at PTEs so far this year followed by the schools sector with 16%.

Colombia:

October RSV

5 ↑ 24%

October FSV

-5 ↓ -10%

October TSV

0 → 0%

YTD RSV

20 ↑ 10%

YTD FSV

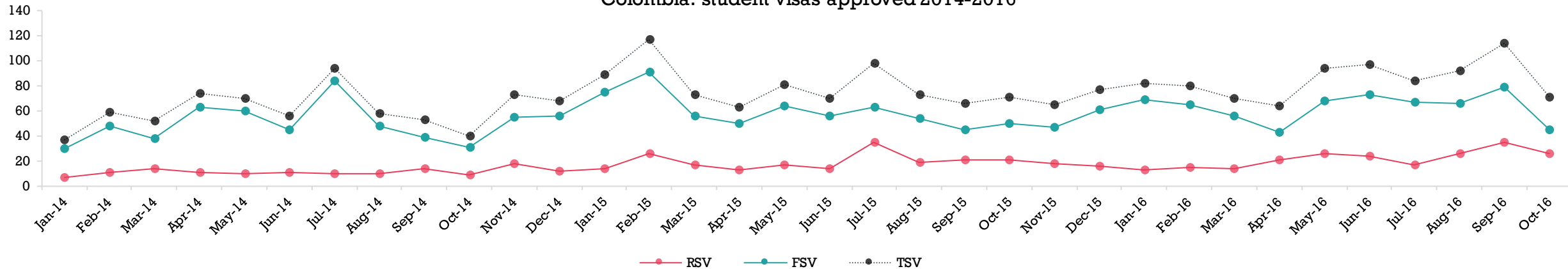
27 ↑ 4%

YTD TSV

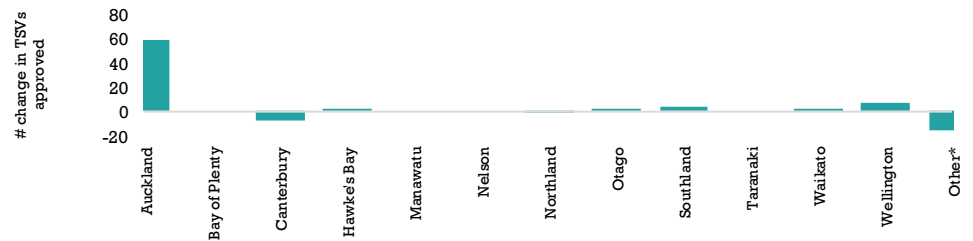
47 ↑ 6%

YTD (October)

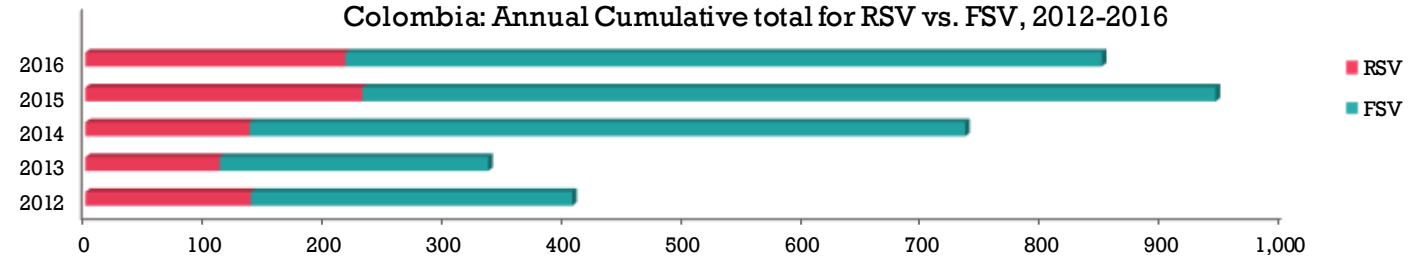
Colombia: student visas approved 2014-2016



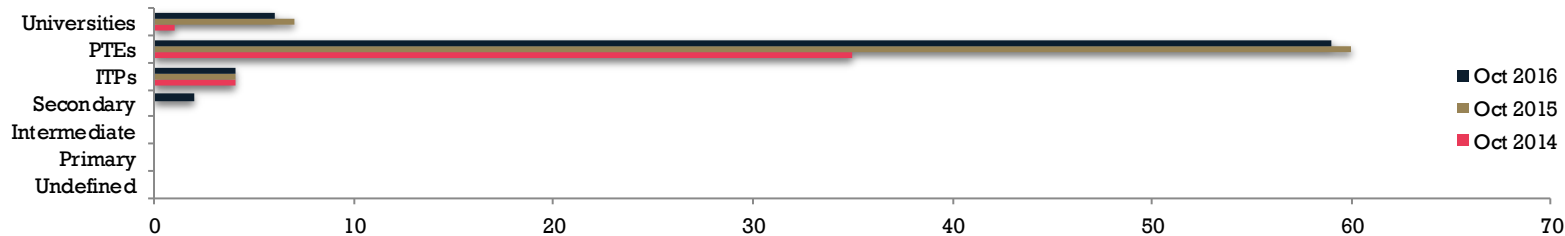
Colombia: 2016 YTD TSV regional change



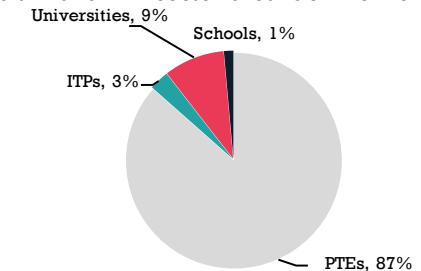
Colombia: Annual Cumulative total for RSV vs. FSV, 2012-2016



Colombia: Total student visas approved by sector, October



Colombia: 2016 YTD Sector breakdown of TSV



Key takeaways:

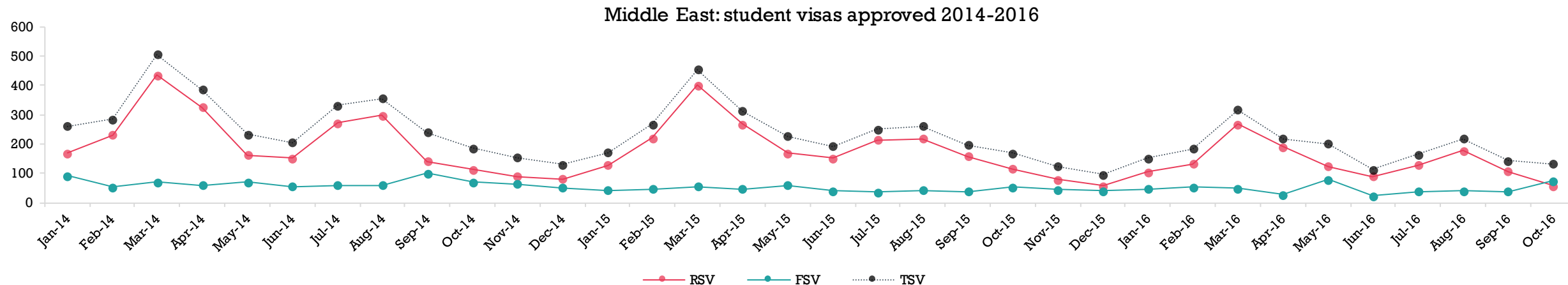
- TSV results for Colombia have increased YTD (+6%, +47) with FSV and RSV experiencing positive growth (+4% and +10%).
- October 2016 saw a mixed results with FSV down (-10%) and RSV up (+24%) compared to October 2015.
- The majority of TSV approved YTD have been in the PTE sector (86%).

Middle East:

October RSV	October FSV	October TSV
-59 ↓ -51%	22 ↑ 42%	-37 ↓ -22%

YTD RSV	YTD FSV	YTD TSV
-670 ↓ -33%	13 → 3%	-657 ↓ -26%

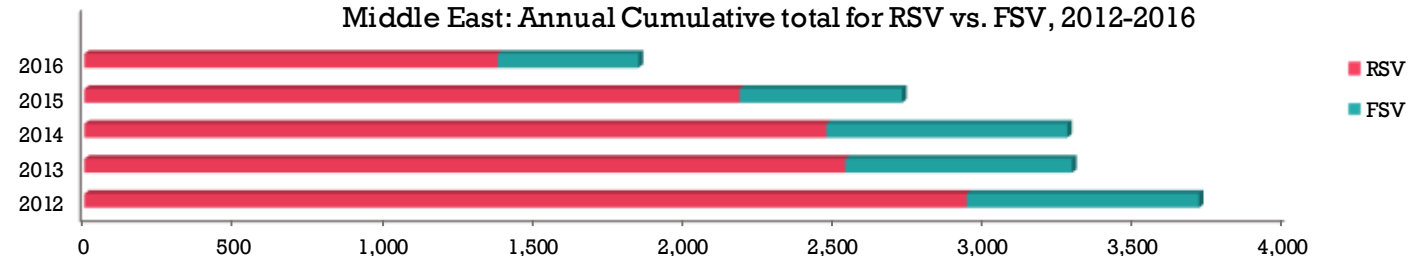
YTD (October)



Middle East: 2016 YTD TSV regional change



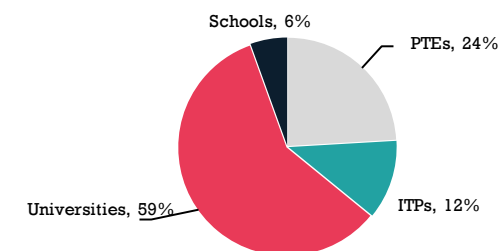
Middle East: Annual Cumulative total for RSV vs. FSV, 2012-2016



Middle East: Total student visas approved by sector, October



Middle East: 2016 YTD Sector breakdown of TSV



Key takeaways:

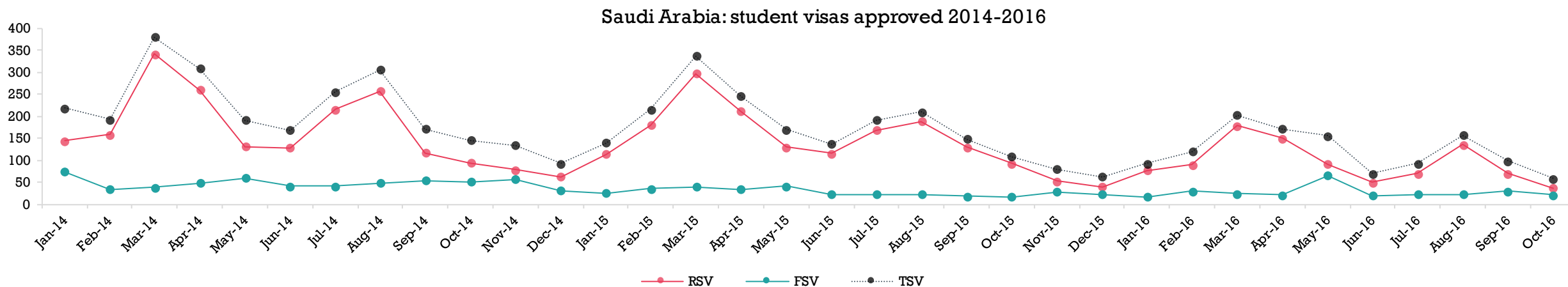
- YTD results in the Middle East have been driven by the decline in scholarship students from Saudi Arabia.
- RSVs for October 2016 results were down (-51%, -51), while FSV were up (+42%, +22) compared to October 2015.
- The university sector accounts for 58% of TSV approved followed by the PTE sector with 24%.

Saudi Arabia:

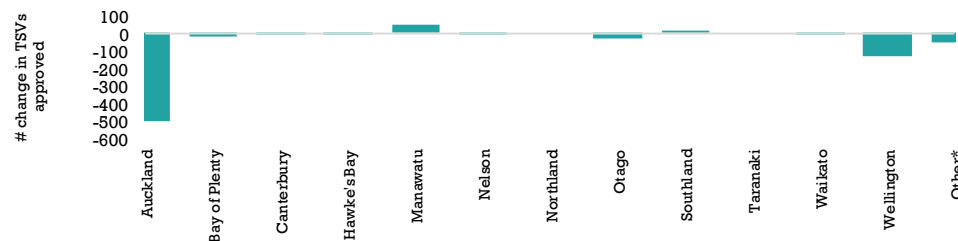
October RSV -55 ↓ -60% October FSV 5 ↑ 31% October TSV -50 ↓ -46%

YTD RSV -678 ↓ -42% YTD FSV -6 ↓ -2% YTD TSV -684 ↓ -36%

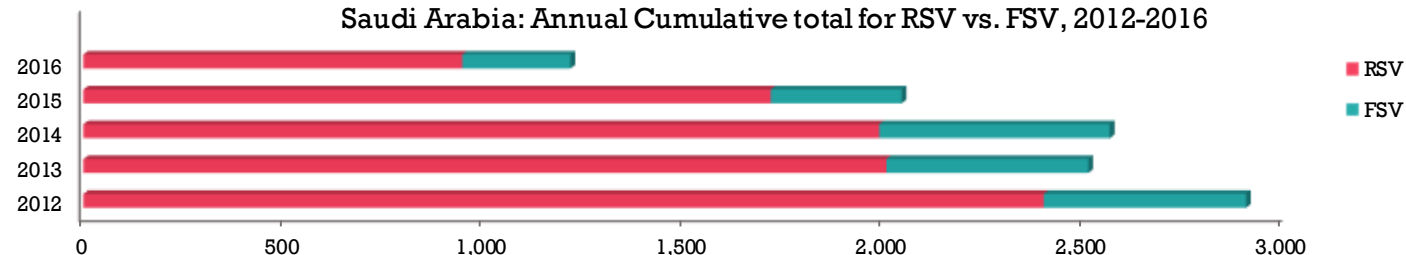
YTD (October)



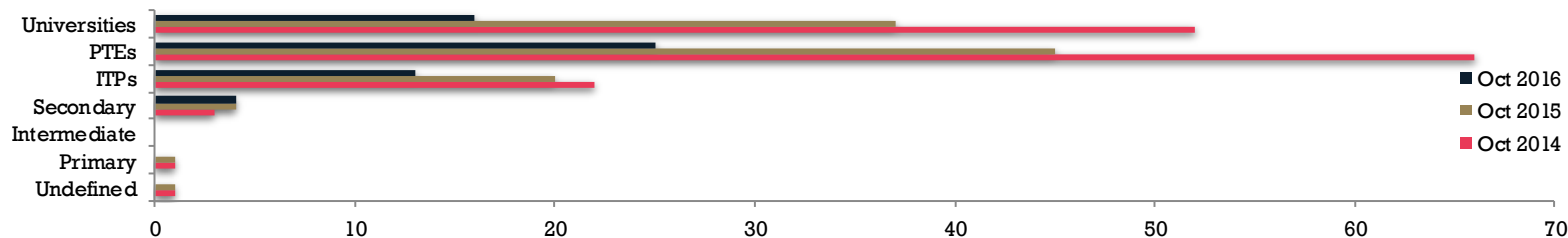
Saudi Arabia: 2016 YTD TSV regional change



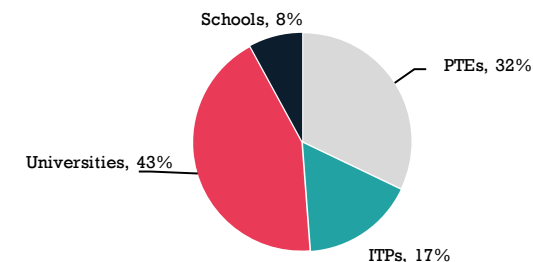
Saudi Arabia: Annual Cumulative total for RSV vs. FSV, 2012-2016



Saudi Arabia: Total student visas approved by sector, October



Saudi Arabia: 2016 YTD Sector breakdown of TSV



Key takeaways:

- Saudi Arabia continues to see negative results, with TSV YTD down (-36%, -684). 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.
- October 2016 TSV were down (-46%, -50) compared to the same month last year which was driven by a decrease in RSV (-60%, -55).

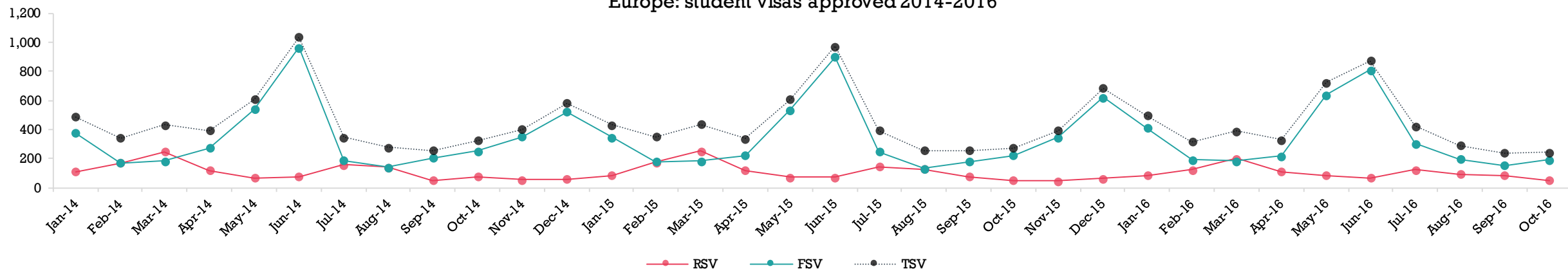
Europe:

October RSV	October FSV	October TSV
0 ➡ 0%	-28 ⬇ -13%	-28 ⬇ -10%

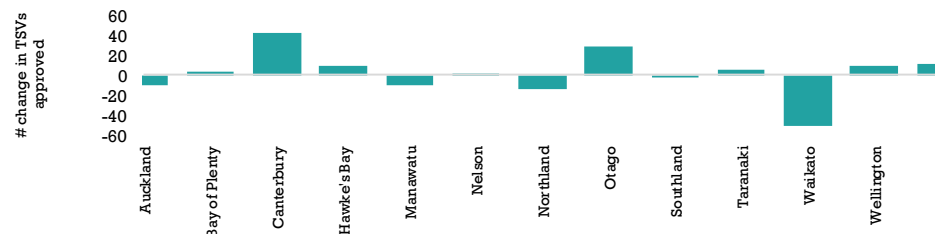
YTD RSV	YTD FSV	YTD TSV
-146 ⬇ -12%	160 ⬆ 5%	14 ➡ 0%

YTD (October)

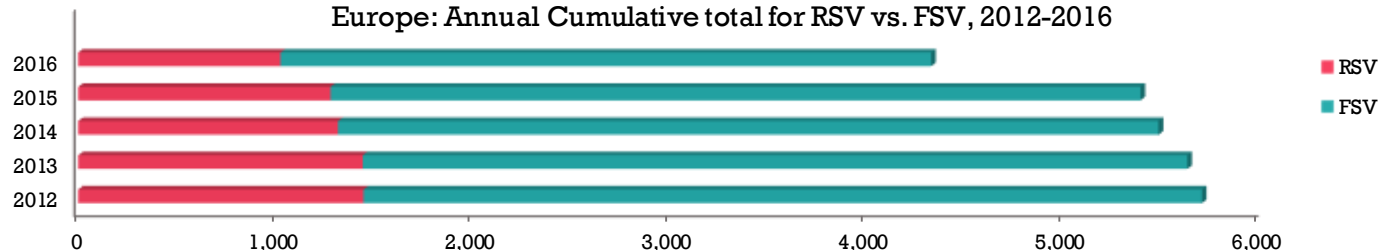
Europe: student visas approved 2014-2016



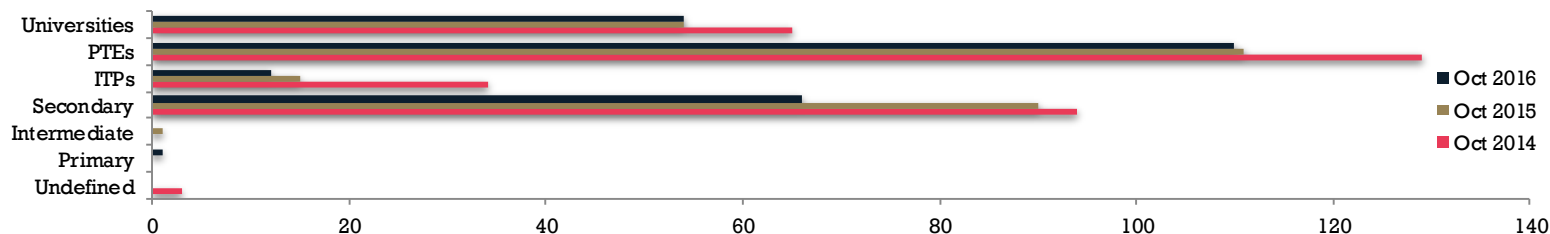
Europe: 2016 YTD TSV regional change



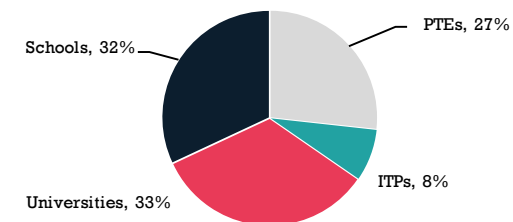
Europe: Annual Cumulative total for RSV vs. FSV, 2012-2016



Europe: Total student visas approved by sector, October



Europe: 2016 YTD Sector breakdown of TSV

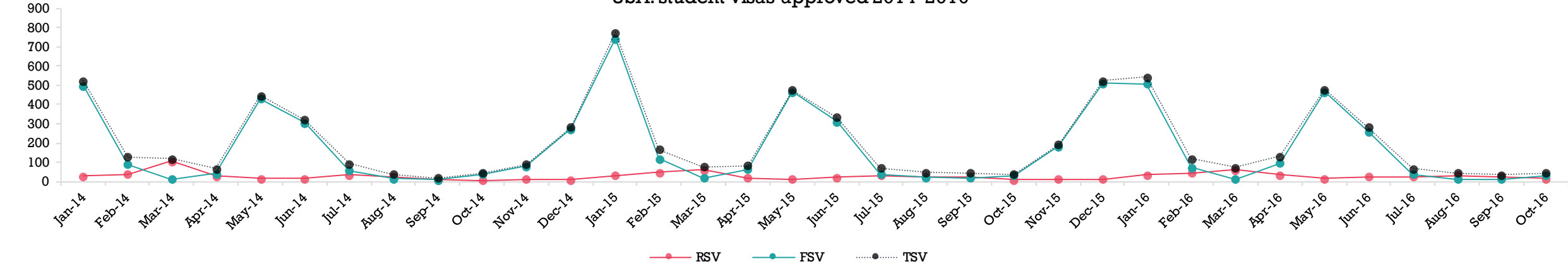


Key takeaways:

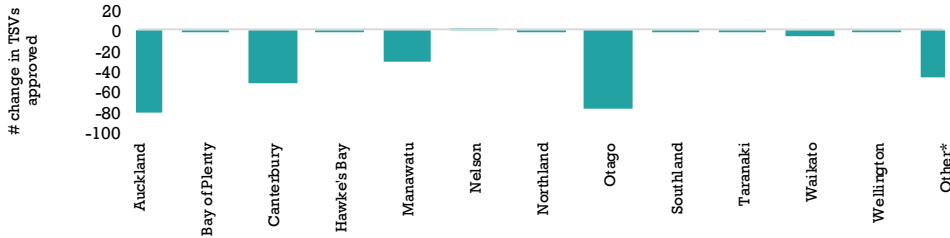
- Europe is flat YTD, (TSV 0%, +14). While FSV YTD have increased (+5%, +160), this is being offset by a decline in RSV, (-12%, -146) compared to the same period last year.
- October 2016 results were down, with FSV driving the decline (-13%, -28) compared to October 2015.
- The university, PTE and school sectors attract the majority of European students (92%).

October RSV	October FSV	October TSV	YTD RSV	YTD FSV	YTD TSV
6 ↑ 75%	-1 → -3%	5 ↑ 13%	23 ↑ 8%	-323 ↓ -18%	-300 ↓ -14%

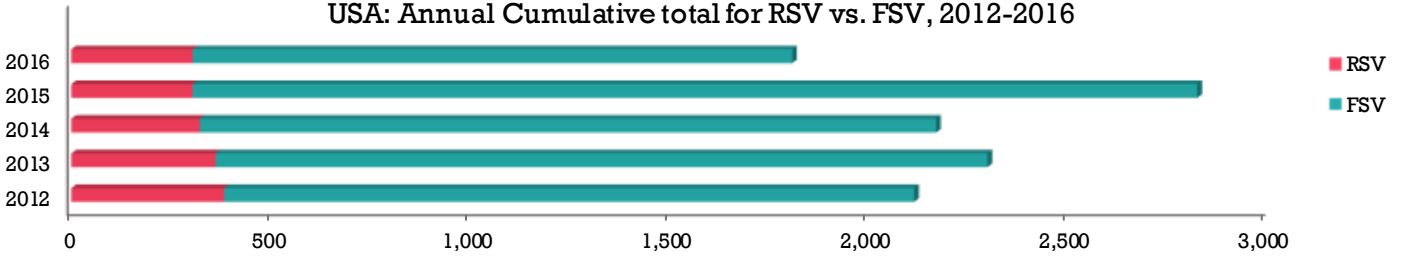
USA: student visas approved 2014-2016



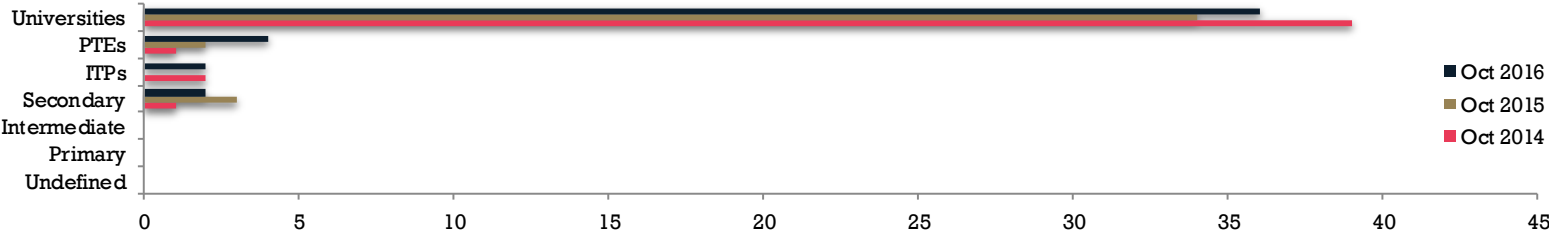
USA: 2016 YTD TSV regional change



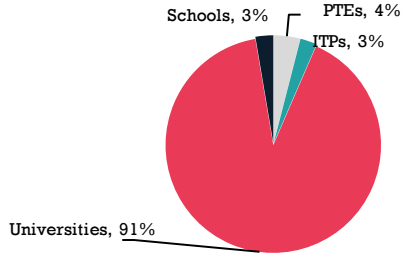
USA: Annual Cumulative total for RSV vs. FSV, 2012-2016



USA: Total student visas approved by sector, October



USA: 2016 YTD Sector breakdown of TSV



Key takeaways:

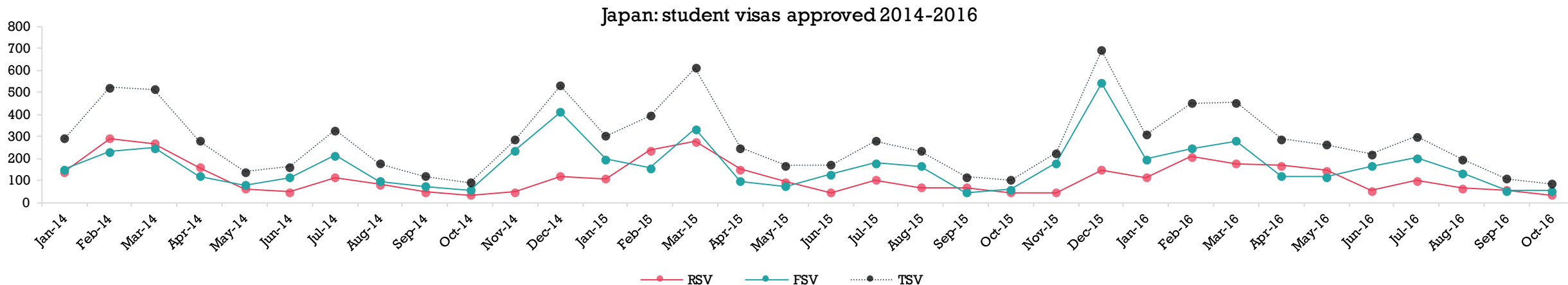
- While USA TSV appear to be much lower than normal YTD (-14%, -300), this is not reflective of the market. There was an 82% increase in the last quarter of 2015, where visas typically approved in the first quarter of 2016 were approved earlier.
- October 2016 results were positive with RSV up (+75%, +6).
- The PTE sector saw an increase in TSVs approved in October 2016.

Japan

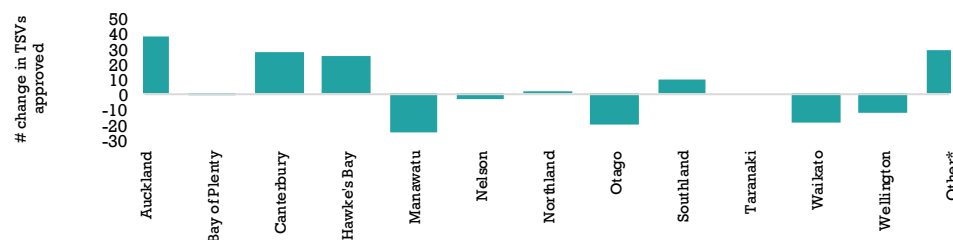
October RSV	October FSV	October TSV
-13 ↓ -29%	-4 ↓ -7%	-17 ↓ -17%

YTD RSV	YTD FSV	YTD TSV
-81 ↓ -7%	129 ↑ 9%	48 → 2%

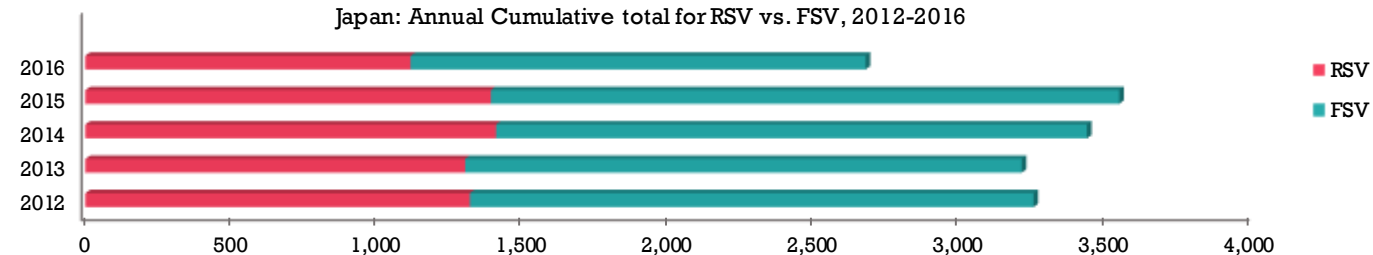
YTD (October)



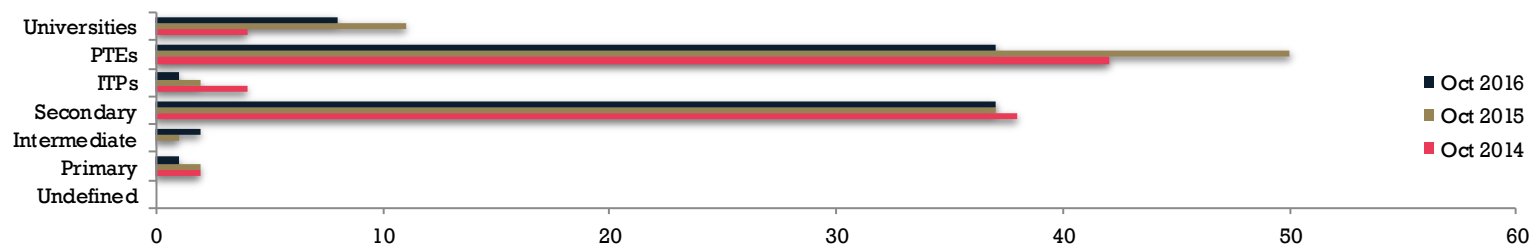
Japan: 2016 YTD TSV regional change



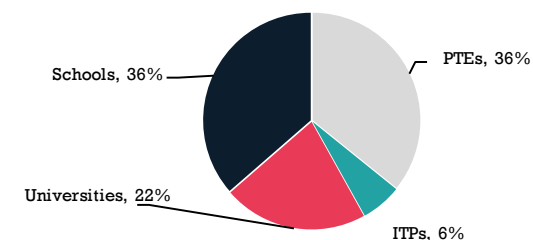
Japan: Annual Cumulative total for RSV vs. FSV, 2012-2016



Japan: Total student visas approved by sector, October



Japan: 2016 YTD Sector breakdown of TSV



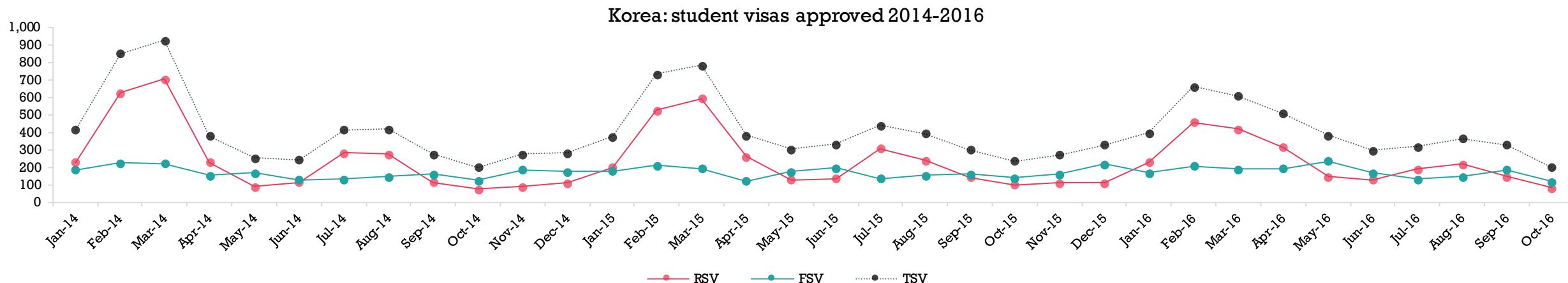
Key takeaways:

- Japan has seen an increase in FSV approved YTD (+9%, +129), however, the number of students choosing to remain/return to New Zealand to study has declined compared to 2015 YTD (-7%, -81).
- The schools and PTE sectors draw 72% of Japanese students to New Zealand.

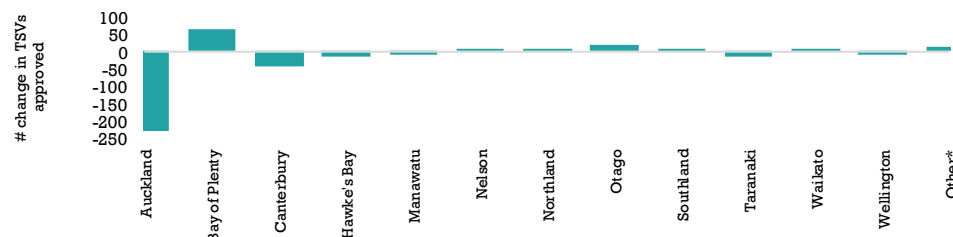
October RSV	October FSV	October TSV
-16 ↓ -16%	-21 ↓ -15%	-37 ↓ -16%

YTD RSV	YTD FSV	YTD TSV
-299 ↓ -11%	84 ↑ 5%	-215 ↓ -5%

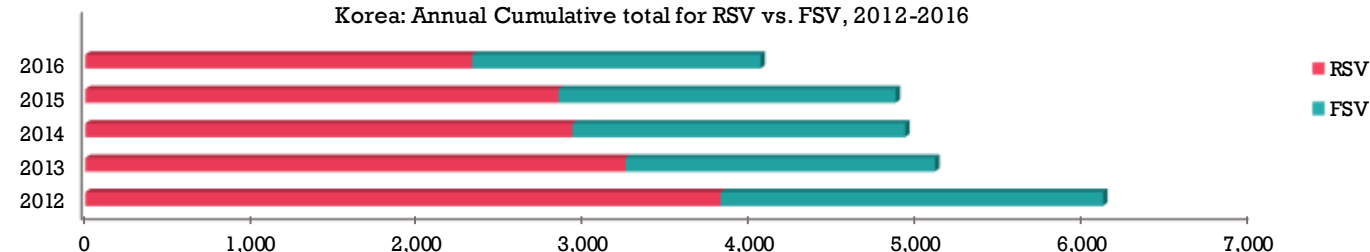
YTD (October)



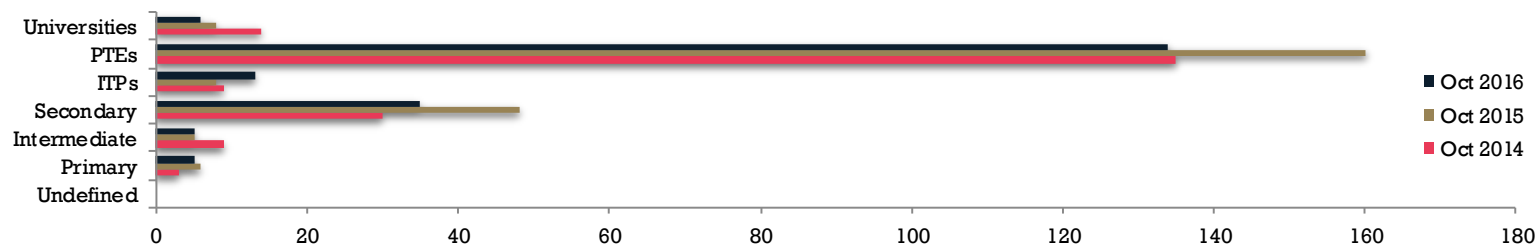
Korea: 2016 YTD TSV regional change



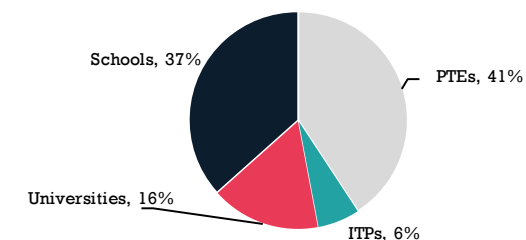
Korea: Annual Cumulative total for RSV vs. FSV, 2012-2016



Korea: Total student visas approved by sector, October



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 (-5%, -215), FSV are up (+5%, +84). October TSV decreased (-16%, -37) driven by a decrease in FSV (-15%, -21).
- 41% of TSV approved YTD were for the PTE sector followed by schools with 37% of student visas.

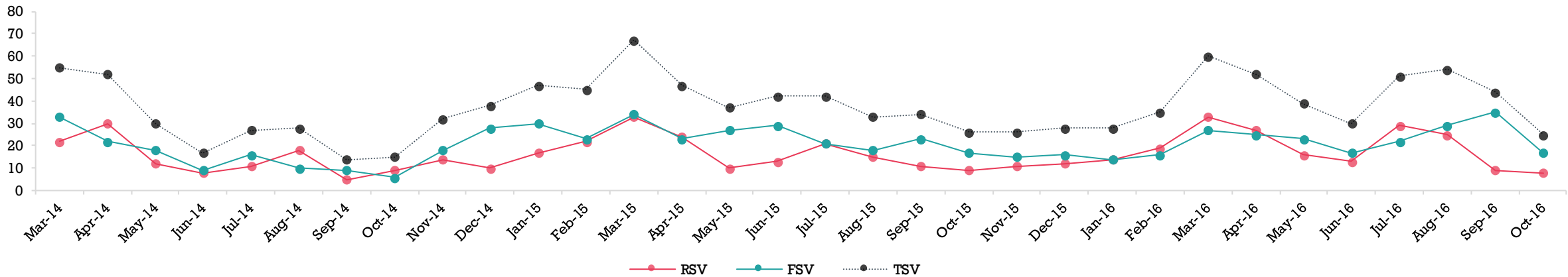
Trends by sector



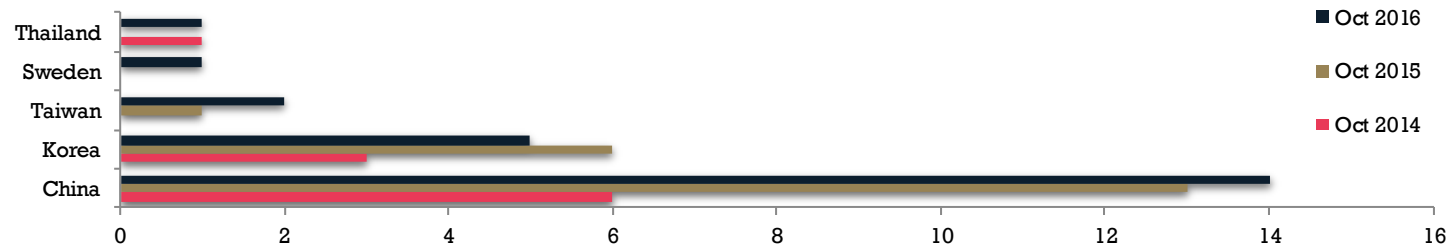
Primary schools

YTD (October)

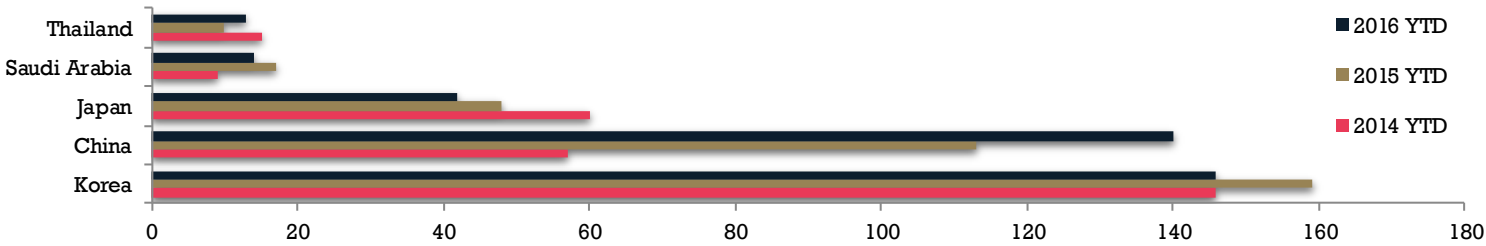
Primary: student visas approved 2014-2016



Primary: Total student visas approved by sector, October

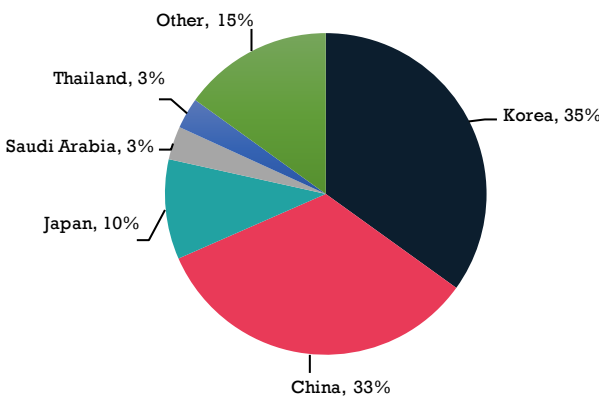


Primary: Total student visas approved by sector, YTD



October RSV	October FSV	October TSV
-1 ↓ -11%	0 → 0%	-1 → -4%
YTD RSV	YTD FSV	YTD TSV
18 ↑ 10%	-20 ↓ -8%	-2 → 0%

Primary: YTD 2016 Sector breakdown of TSV

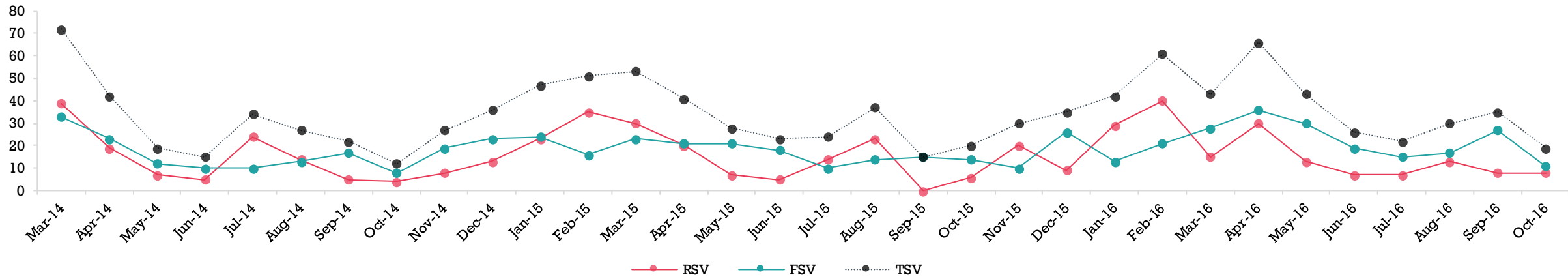


- Key takeaways:
- TSV saw a flat result in October 2016 (-4%, -1), while RSV YTD are up (+10%, +18) compared to the same time last year.
 - Korea, China and Japan make up 78% of all visas approved this YTD in primary schools.

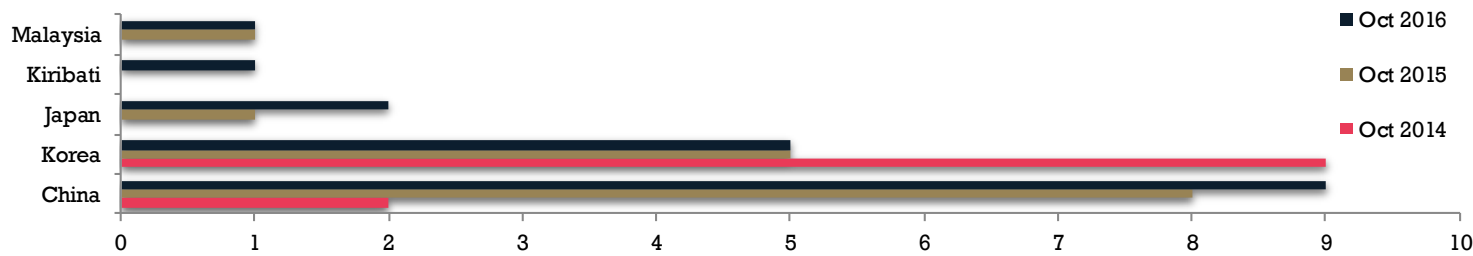
Intermediate schools

YTD (October)

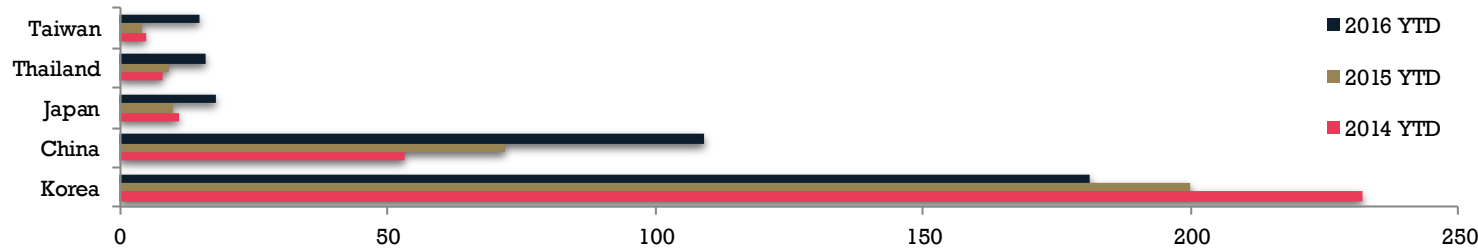
Intermediate: student visas approved 2014-2016



Intermediate: Total student visas approved by sector, October

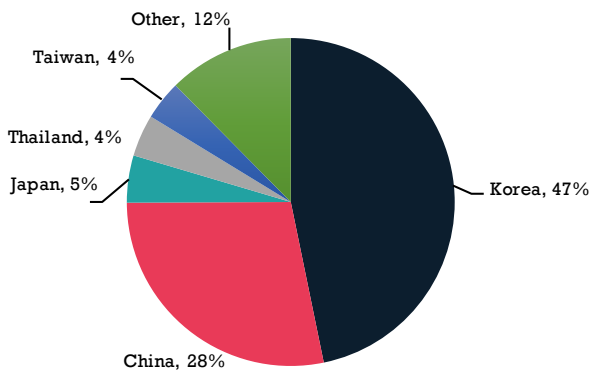


Intermediate: Total student visas approved by sector, YTD



October RSV	October FSV	October TSV
2	-3	-1
↑ 33%	↓ -21%	↓ -5%
YTD RSV	YTD FSV	YTD TSV
7	41	48
→ 4%	↑ 23%	↑ 14%

Intermediate: YTD 2016 Sector breakdown of TSV



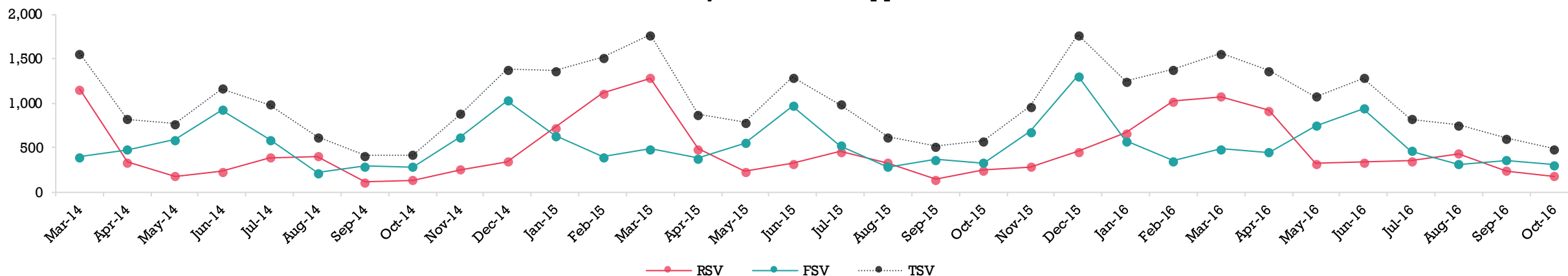
Key takeaways:

- The intermediate school sector is experiencing growth in TSV YTD (+14%, +48), this has been driven by an increase in FSV (+23%, +41).
- October 2016 saw mixed results with FSV down (-21%) and RSV up (+33%) compared to October 2015.

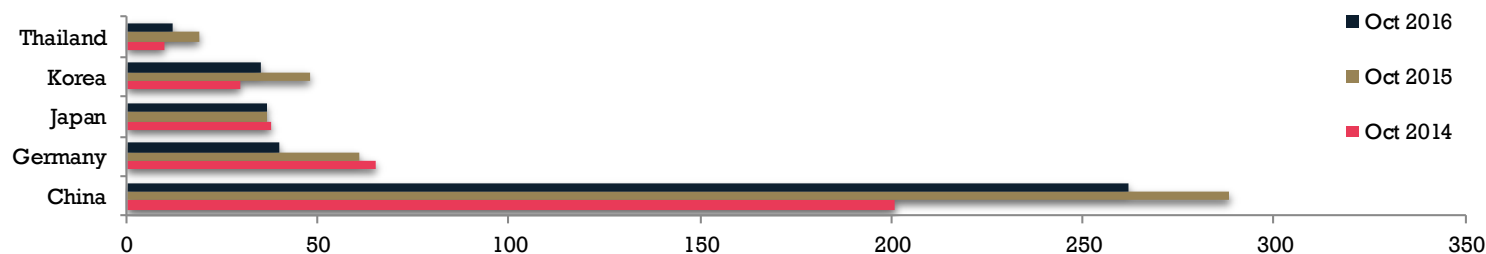
Secondary schools

YTD (October)

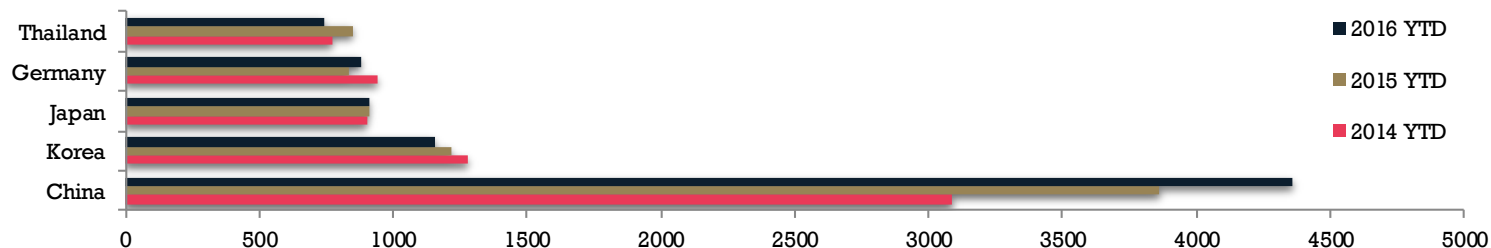
Secondary: student visas approved 2014-2016



Secondary: Total student visas approved by sector, October

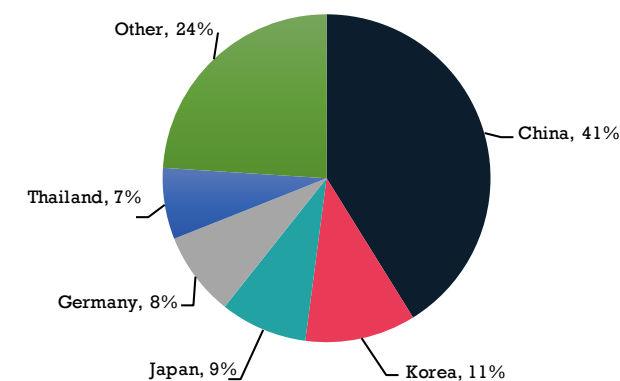


Secondary: Total student visas approved by sector, YTD



October RSV	October FSV	October TSV
-67 ↓ -27%	-21 ↓ -6%	-88 ↓ -15%
YTD RSV	YTD FSV	YTD TSV
211 → 4%	70 → 1%	281 → 3%

Secondary: YTD 2016 Sector breakdown of TSV

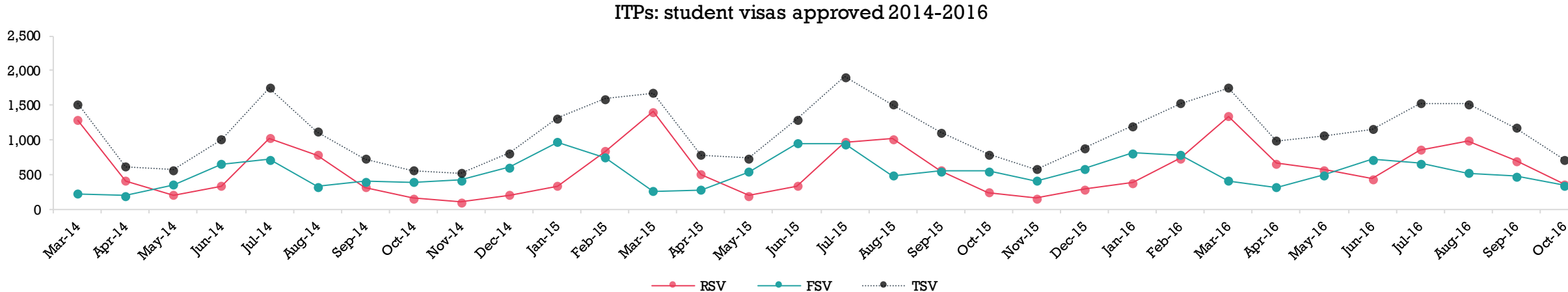


Key takeaways:

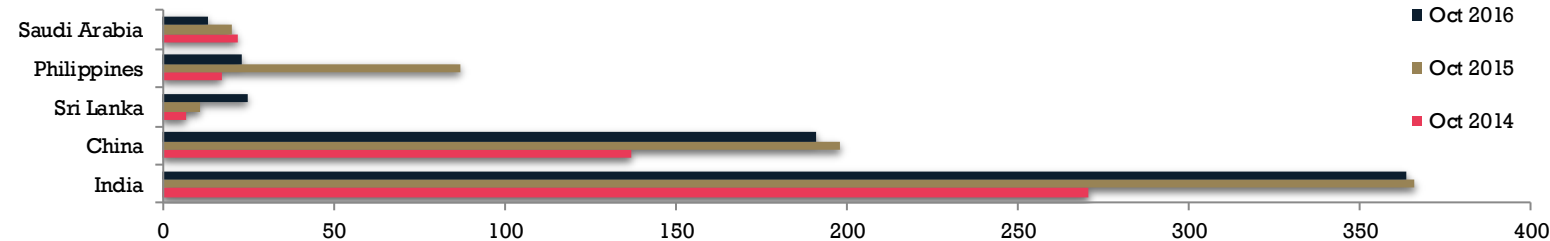
- YTD, the secondary schools market results are flat, with TSV and FSV both slightly up (+3% and +1%) compared to 2015. October 2016 TSV were down (-15%, -88) driven by a decline in RSV (-27%, -67) compared on October 2015.
- Markets that saw growth in TSV YTD were China and Germany.
- The majority (61%) of secondary school students are from China, Korea and Japan.

Institutes of Technology and Polytechnics (ITPs) 🌞

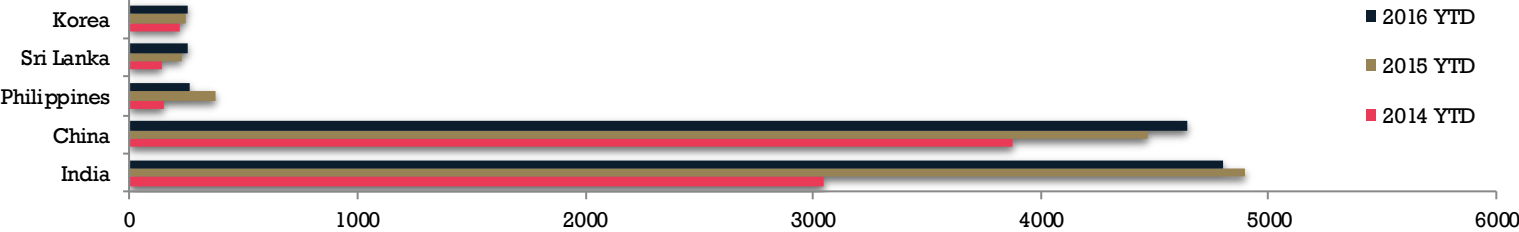
YTD (October)



ITPs: Total student visas approved by sector, October

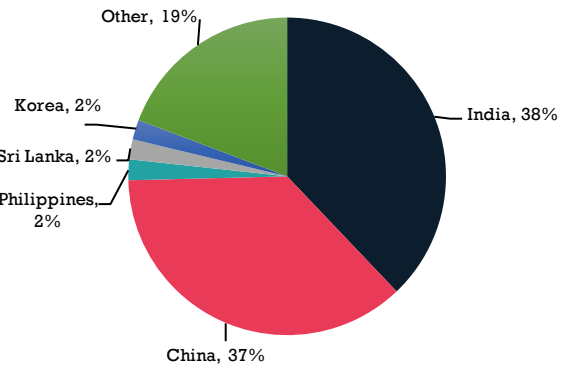


ITPs: Total student visas approved by sector, YTD



October RSV	October FSV	October TSV
119 ↑ 48%	-197 ↓ -36%	-78 ↓ -10%
YTD RSV	YTD FSV	YTD TSV
634 ↑ 10%	-728 ↓ -12%	-94 → -1%

ITPs: YTD 2016 Sector breakdown of TSV



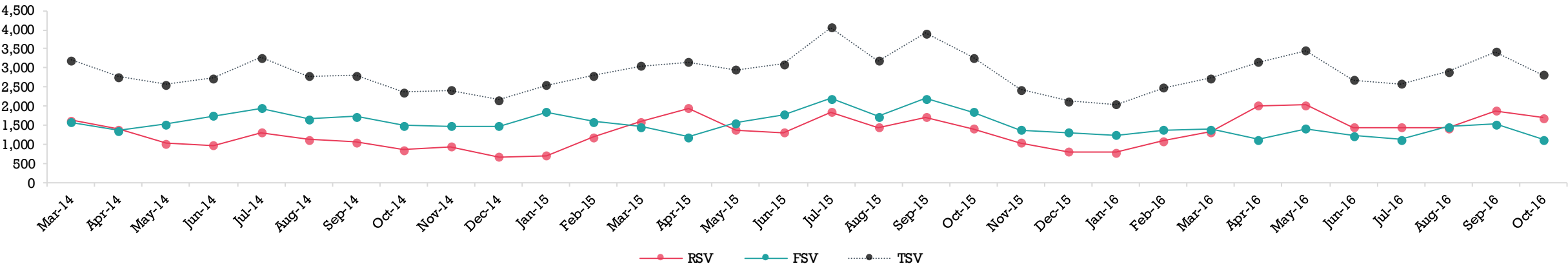
Key takeaways:

- YTD results for the ITP sector are flat, (-1%, -94) however FSV are down (-12%, -728) compared to 2015 YTD. RSV have seen strong growth YTD (+10%, +634) 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 (75% YTD).
- October 2016 saw a decline in TSV (-10%, -78) which was driven by FSV declining (-36%, -197) while RSV are up (+48%, +118) compared to October 2015.

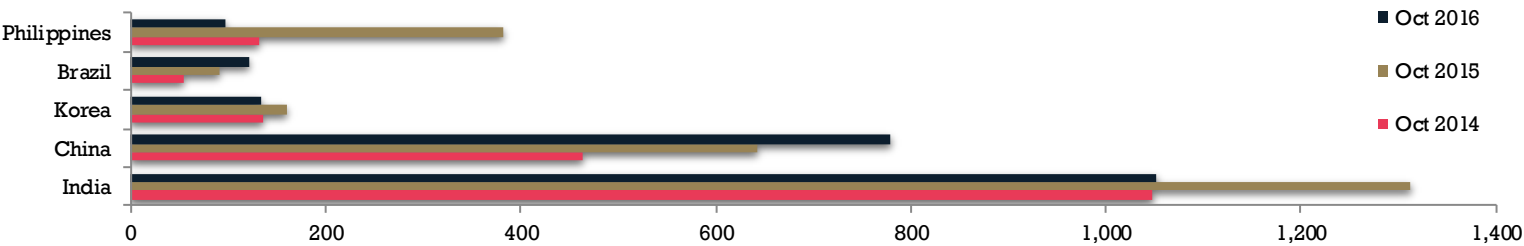
Private Training Establishments (PTEs)

YTD (October)

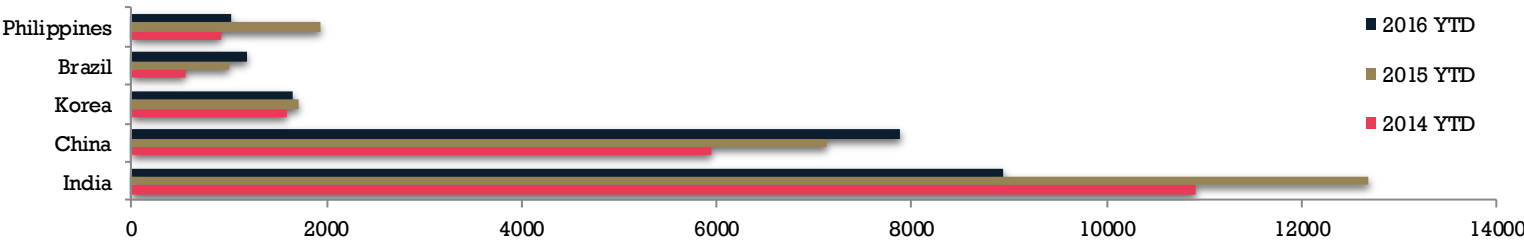
PTEs: student visas approved 2014-2016



PTEs: Total student visas approved by sector, October

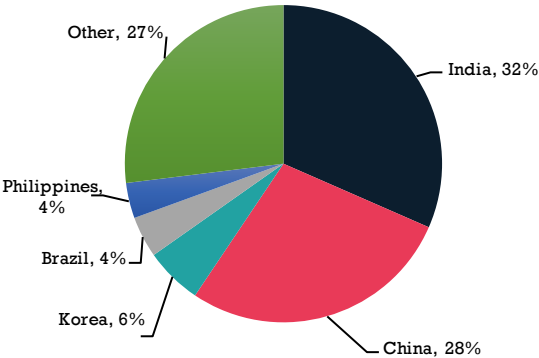


PTEs: Total student visas approved by sector, YTD



October RSV	October FSV	October TSV
278 ↑ 20%	-725 ↓ -39%	-447 ↓ -14%
YTD RSV	YTD FSV	YTD TSV
604 → 4%	-4,348 ↓ -25%	-3,744 ↓ -12%

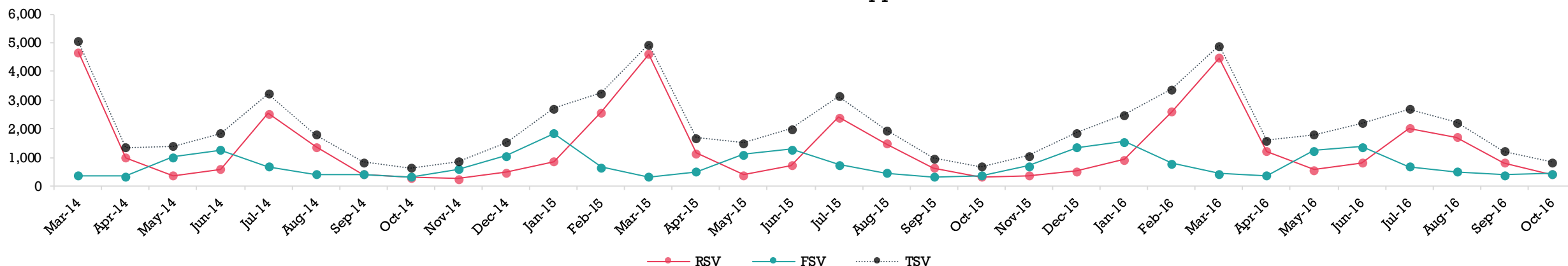
PTEs: YTD 2016 Sector breakdown of TSV



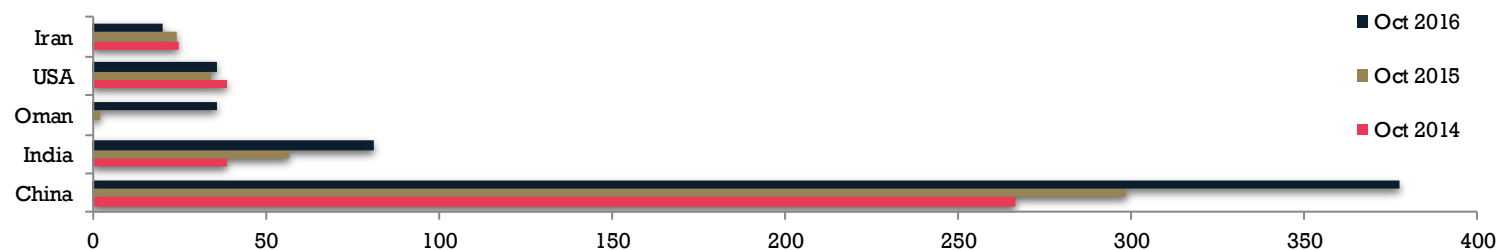
Key takeaways:

- The decline in TSV approved for the PTE sector continues YTD (-12% , -3,744) which is being driven by a reduction in student visas approved for FSVs.
- The strong decrease in FSV for this sector (-25%, -4,348 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 (+11%, +766), and Brazil (+19%, +192).

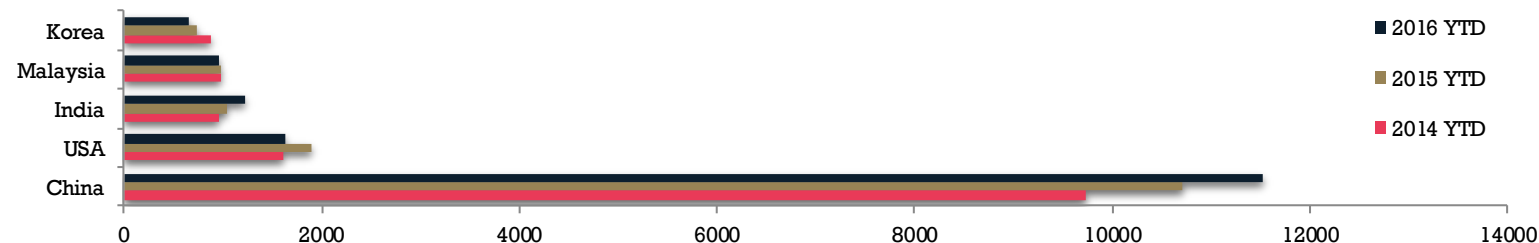
Universities: student visas approved 2014-2016



Universities: Total student visas approved by sector, October

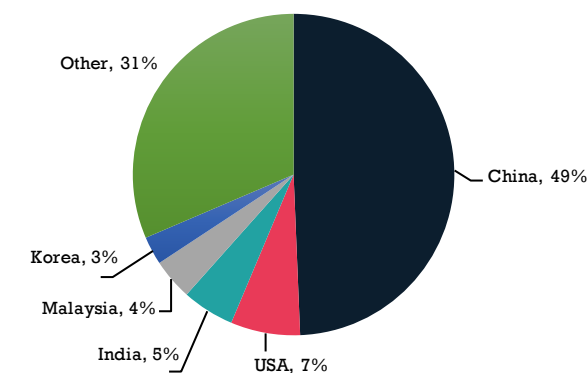


Universities: Total student visas approved by sector, YTD



October RSV	October FSV	October TSV
85 ↑ 26%	65 ↑ 18%	150 ↑ 22%
YTD RSV	YTD FSV	YTD TSV
357 ➡ 2%	120 ➡ 2%	477 ➡ 2%

Universities: YTD 2016 Sector breakdown of TSV



Key takeaways:

- YTD results for the university sector remain stable (+2%, +477). The sector saw a increase in TSV for October 2016 (+22%, +150), with both FSV (+18%, +65) and RSV (+26%, +85) showing strong growth compared to October 2015.
- China makes up almost half (49%) of all TSV approved YTD for the university sector followed by the USA with just 7%.

Trends by region



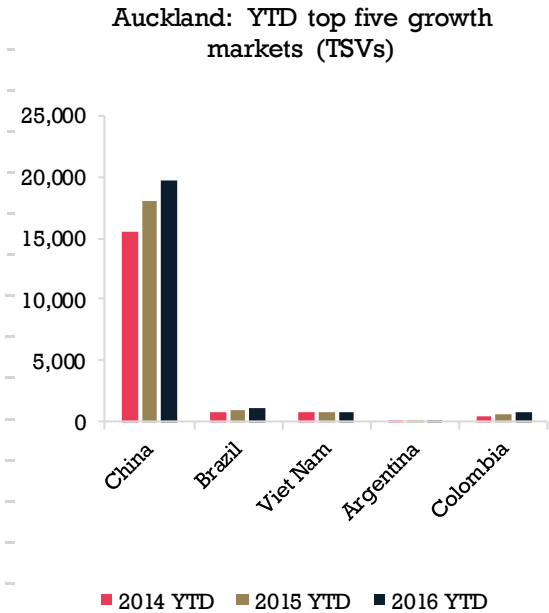
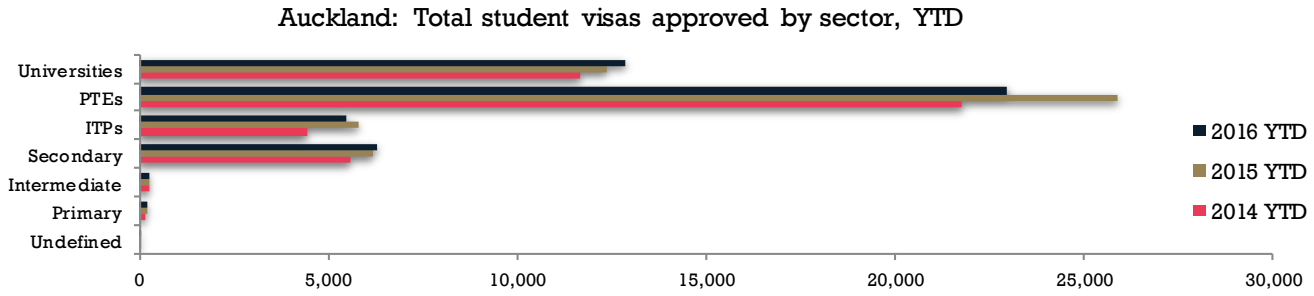
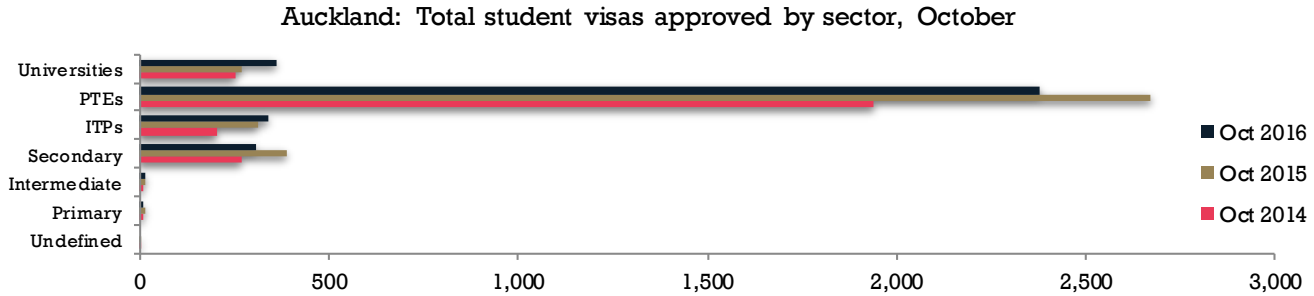
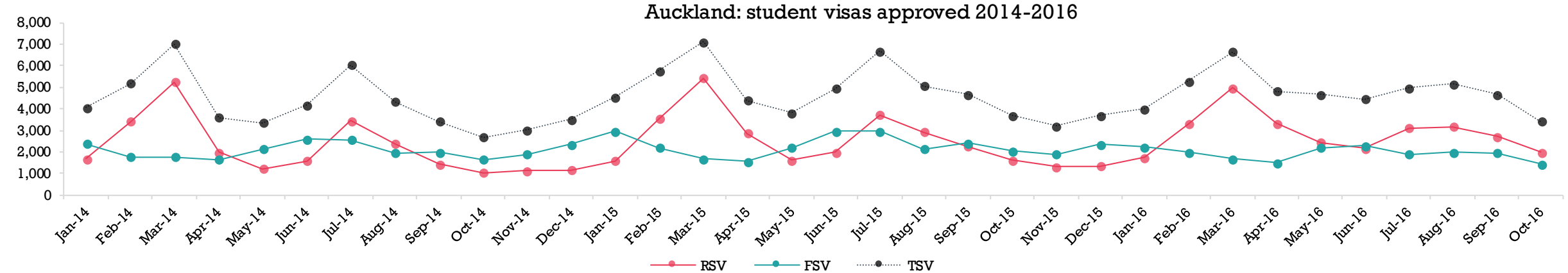
Notes about regional data

- Due to data improvement processes within INZ, there have been some changes to region-based data for visas.
- Numbers in these slides may have changed from slides previously produced.
- This data should be treated with caution, therefore the numbers and percentages changes should be considered approximates.



October RSV	October FSV	October TSV
362 ↑ 22%	-629 ↓ -31%	-267 ↓ -7%

YTD RSV	YTD FSV	YTD TSV
1,448 ↑ 5%	-4,034 ↓ -17%	-2,586 ↓ -5%



Top FSV shifts		
October FSV	Change	% change
China	56	13%
Thailand	15	60%
Brazil	14	23%
Sri Lanka	-29	-56%
Philippines	-228	-77%
India	-423	-60%

FSVs YTD		
FSVs YTD	Change	% change
China	340	7%
Viet Nam	79	36%
Brazil	76	9%
Bangladesh	-130	-61%
Philippines	-831	-54%
India	-3880	-48%

- Key takeaways:
- TSV for the Auckland region are in decline (-5%,-2,586) YTD. This is being driven by a decrease in FSV (-17%, -4,034). However RSV, are up (+5%, +1,448).
 - The decline in FSV YTD is driven by a drop in approvals for Indian (-48%, -3,880) and Filipino students (-54%, -831) as a result of the Rule 18 change in late 2015.
 - The decrease in the PTE sector TSV YTD (-11%, -2,936) is being driven by the decline in visas for India and the Philippines, but this was slightly offset by increases in visas for China, Brazil and Viet Nam.

-18 ↓ -22%

-124 ↓ -52%

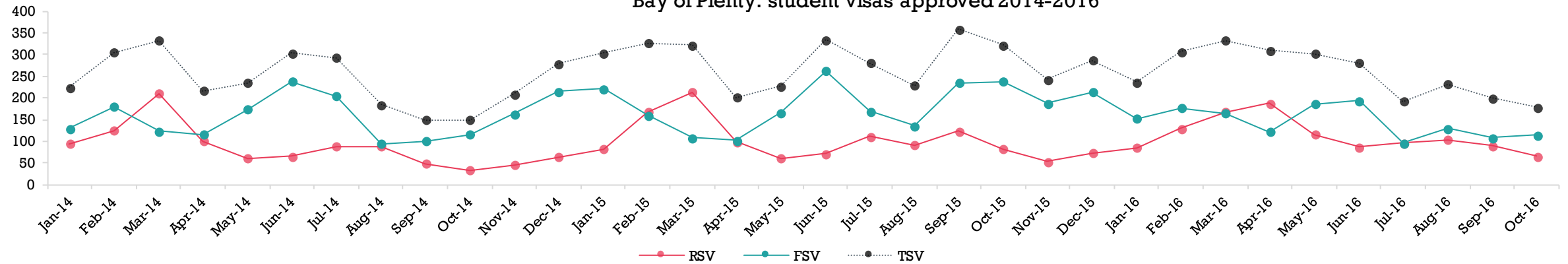
-142 ↓ -44%

20 → 2%

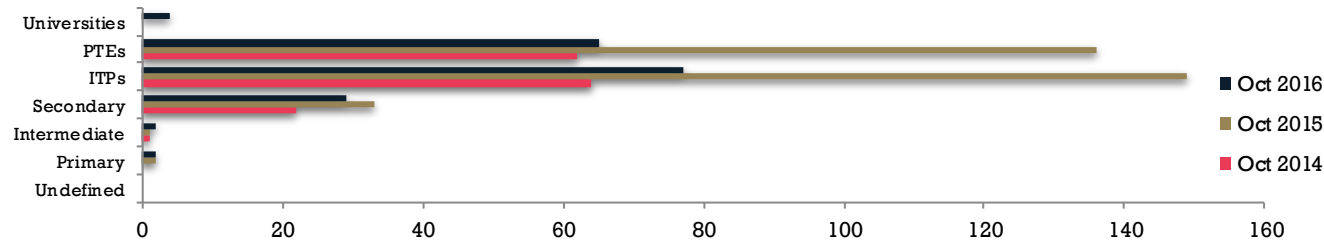
-354 ↓ -20%

-334 ↓ -12%

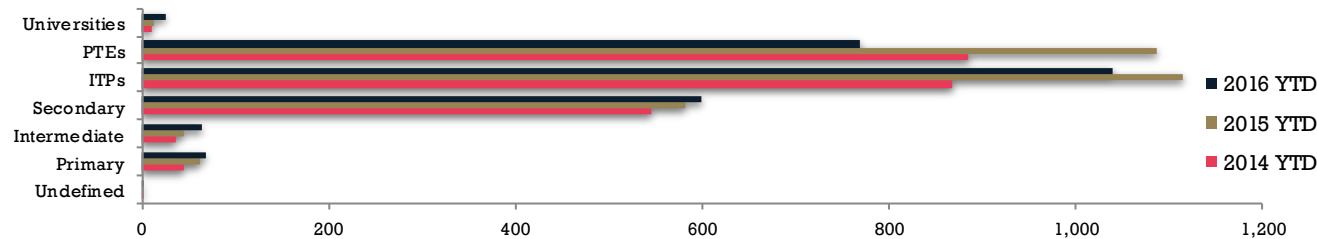
Bay of Plenty: student visas approved 2014-2016



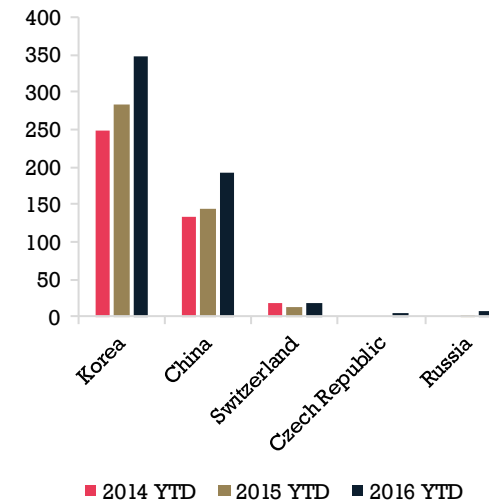
Bay of Plenty: Total student visas approved by sector, October



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



Bay of Plenty: YTD top five growth markets (TSVs)



Top FSV shifts

October FSV	Change	% change
China	4	67%
Korea	3	43%
Brazil	2	67%
Germany	-6	-67%
India	-24	-33%
Philippines	-96	-88%

FSVs YTD	Change	% change
Korea	64	53%
China	23	38%
Russia	6	-
Brazil	-30	-43%
India	-160	-21%
Philippines	-217	-61%

Key takeaways:

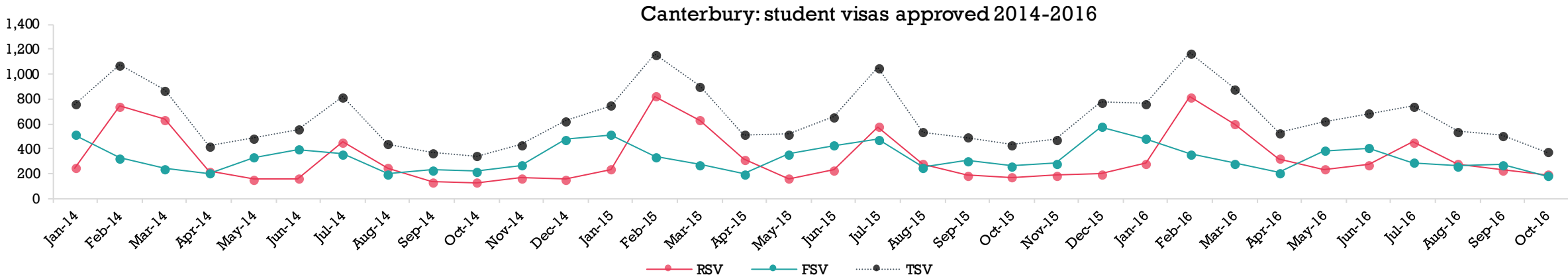
- TSV and FSV approved for Bay of Plenty are both down YTD (-12% and -20% respectively). October 2016 saw visa approvals decline, with a decrease in RSV (-22%, -18) and a decrease in FSV approvals (-52%, -124) compared to October 2015.
- The decline in FSV TYD is being driven by the Philippines and India which were affected by the English language requirements in late 2015. Korea and China have seen some strong growth in TSV YTD for the region.
- There have been some changes to the way that regions are recorded in INZ data, which have impacted numbers previously published for this region.



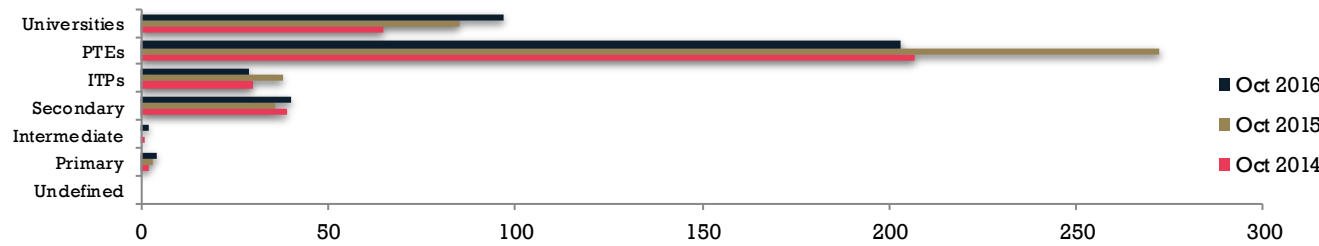
October RSV	October FSV	October TSV
24 ↑ 14%	-83 ↓ -32%	-59 ↓ -14%

YTD RSV	YTD FSV	YTD TSV
80 → 2%	-276 ↓ -8%	-196 → -3%

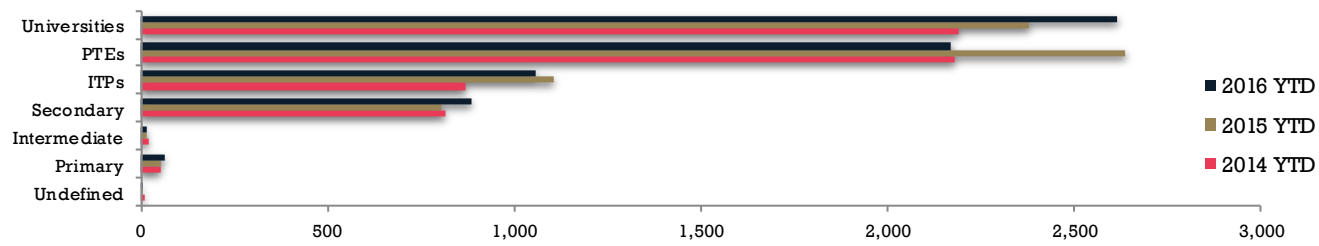
YTD (October)



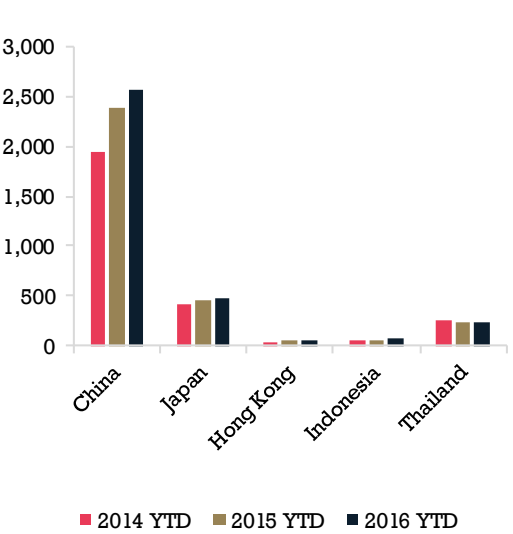
Canterbury: Total student visas approved by sector, October



Canterbury: Total student visas approved by sector, YTD



Canterbury: YTD top five growth markets (TSVs)



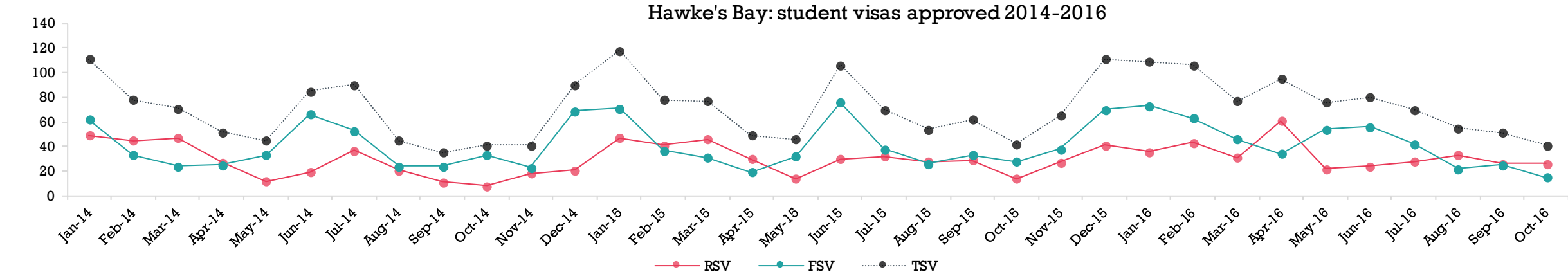
Top FSV shifts

October FSV	Change	% change
China	14	29%
Japan	4	44%
Taiwan	4	200%
Viet Nam	-22	-96%
Philippines	-30	-79%
India	-45	-59%

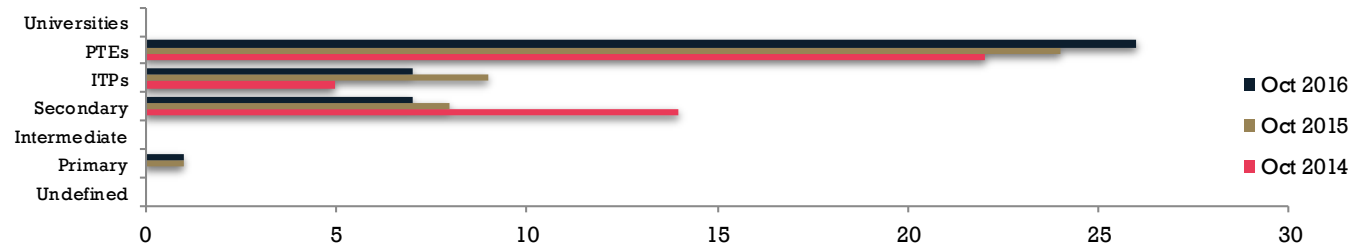
FSVs YTD	Change	% change
China	55	8%
Japan	18	7%
Hong Kong	17	189%
USA	-59	-22%
Philippines	-91	-46%
India	-229	-25%

Key takeaways:

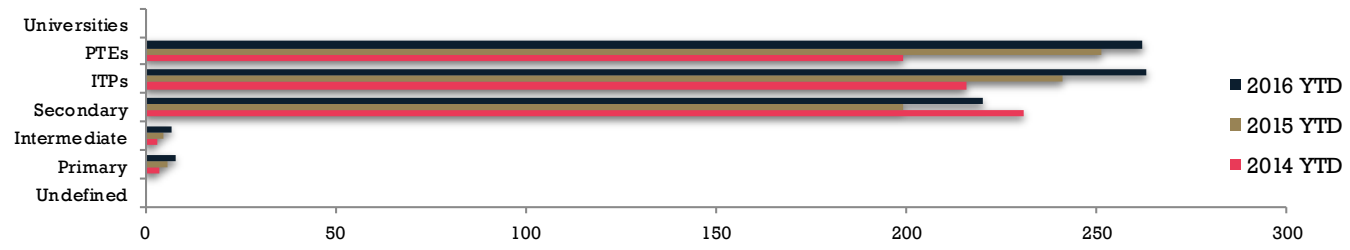
- Canterbury YTD results are down slightly due to a moderate decline in FSV (-8%; -276), compared to 2015 YTD. The October 2016 results were down (TSV -14%, -59). The decline was driven FSV down (-32%, -83) compared to October 2015.
- The university sector in Canterbury continues to be the largest sector (38%) and experienced strong growth in TSV YTD (+10%, +234). Secondary schools in the Canterbury region have also seen an increase in TSV YTD (+10%, +80). The drop in TSV 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.



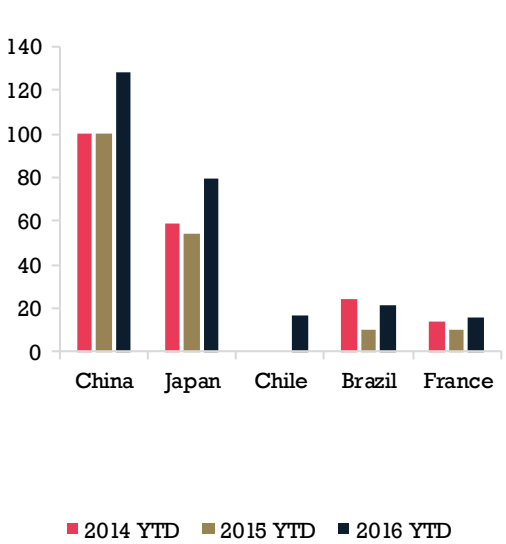
Hawke's Bay: Total student visas approved by sector, October



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



Hawke's Bay: YTD top five growth markets (TSVs)



Top FSV shifts

October FSV	Change	% change
India	3	75%
Hong Kong	1	-
Czech Republic	-1	-100%
China	-2	-50%
Sri Lanka	-3	-100%
Korea	-5	-100%

FSVs YTD	Change	% change
China	21	66%
Chile	17	-
Japan	16	62%
Sri Lanka	-5	-42%
Korea	-8	-53%
India	-38	-25%

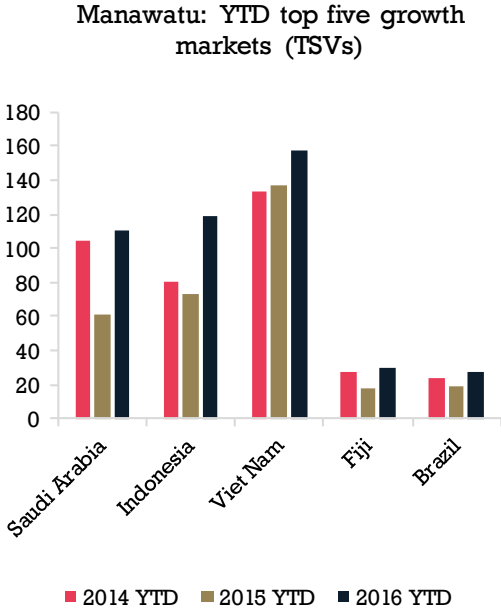
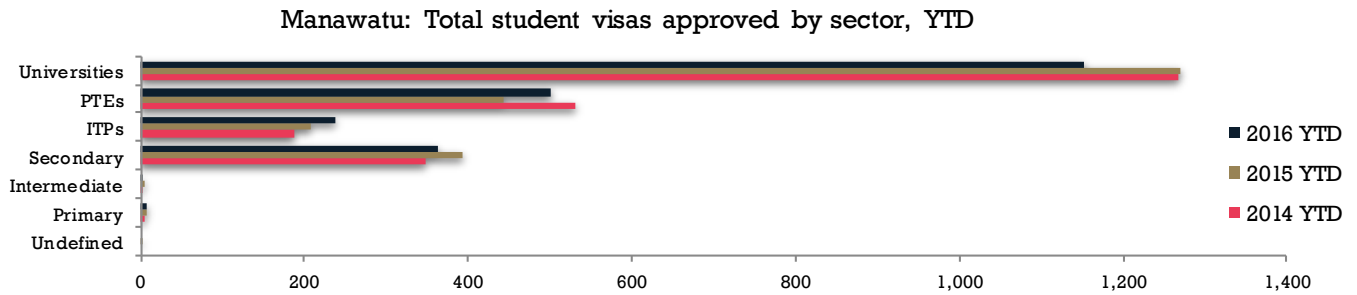
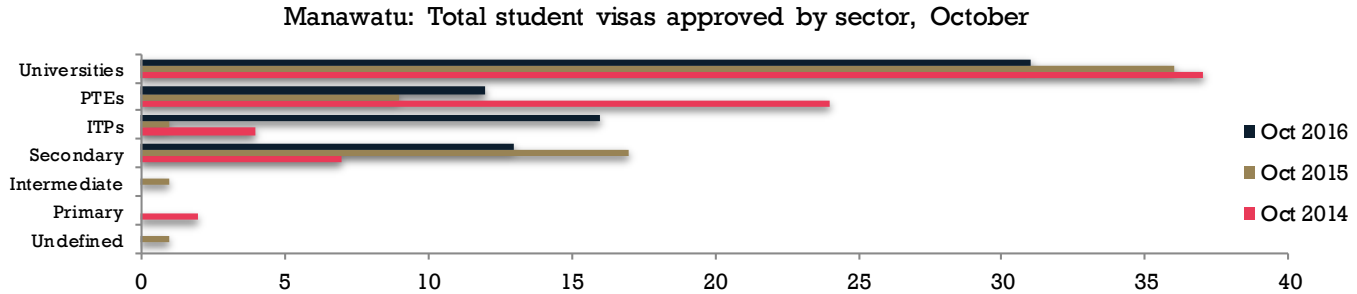
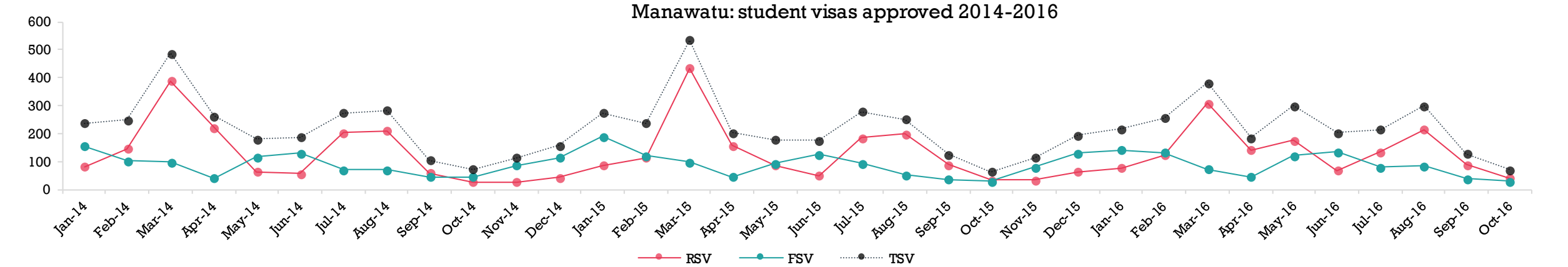
Key takeaways:

- Overall results are positive in Hawke's Bay, with increases in FSV (+10%, +39) and RSV (+6%, +19) YTD. October 2016 results were mixed, with FSV down (-46%) while RSV are up (+86%) compared to October 2015.
- All sectors have seen growth in TSV YTD in the region compared to 2015, with China and Japan experiencing strong growth.
- There have been some changes to the way that regions are recorded in INZ data, which have impacted numbers previously published for this region.



October RSV	October FSV	October TSV
7 ↑ 20%	0 → 0%	7 ↑ 11%

YTD RSV	YTD FSV	YTD TSV
-62 ↓ -4%	-3 → 0%	-65 → -3%



Top FSV shifts

October FSV	Change	% change
Japan	2	-
Philippines	2	-
Botswana	1	-
Pakistan	-2	-100%
India	-3	-50%
China	-4	-50%

FSVs YTD	Change	% change
Indonesia	62	477%
Saudi Arabia	25	357%
Germany	13	54%
USA	-28	-33%
Thailand	-56	-71%
India	-59	-37%

- Key takeaways:
- YTD results for Manawatu are down (-3%, -65) driven by a decline in RSV (-4%, -62) compared to 2015.
 - Despite the overall decline, the ITP (+14%) and PTE (+13%) sectors have experienced growth in TSV YTD.
 - Indonesia, Saudi Arabia and Germany have experienced strong growth in FSV YTD.



October RSV	October FSV	October TSV
2	-12	-10

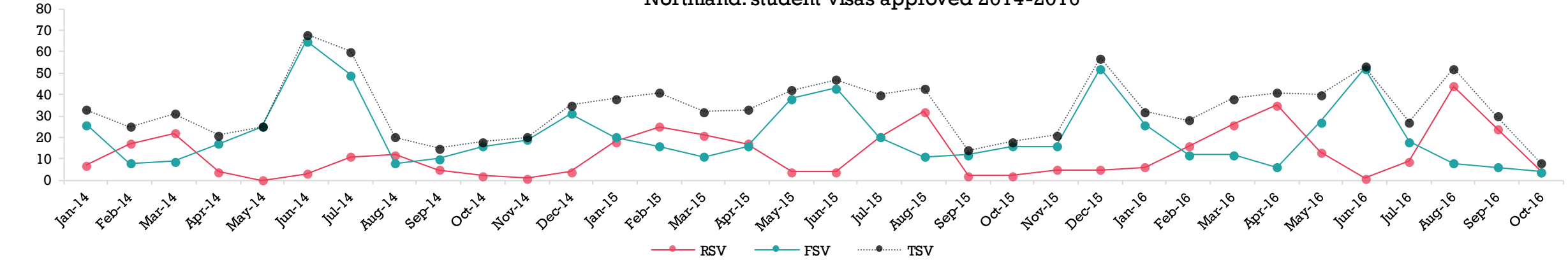
↑ 100% ↓ -75% ↓ -56%

YTD RSV	YTD FSV	YTD TSV
33	-32	1

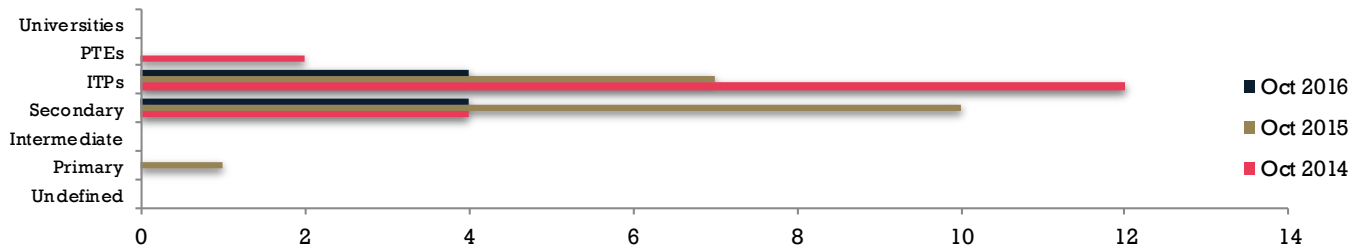
↑ 23% ↓ -16% → 0%

YTD (October)

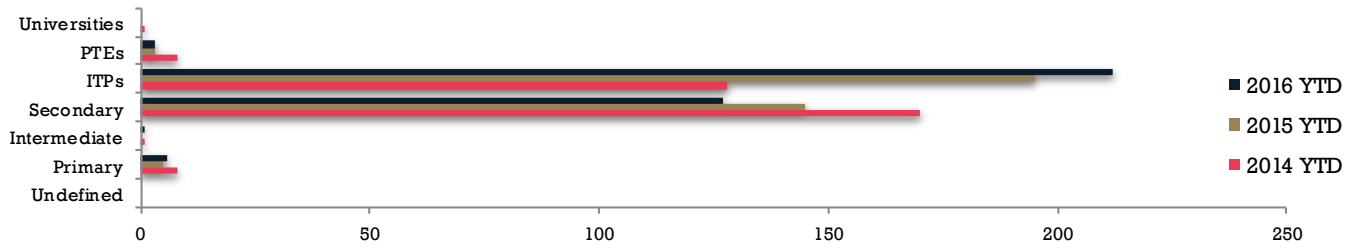
Northland: student visas approved 2014-2016



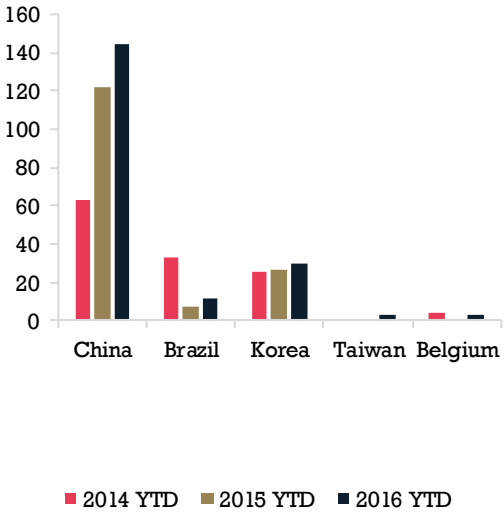
Northland: Total student visas approved by sector, October



Northland: Total student visas approved by sector, YTD



Northland: YTD top five growth markets (TSVs)



Top FSV shifts

October FSV	Change	% change
Italy	0	0%
Russia	0	0%
Austria	-1	-100%
India	-2	-67%
Germany	-3	-75%
China	-5	-100%

FSVs YTD	Change	% change
Japan	3	300%
Taiwan	3	-
Belgium	2	200%
Switzerland	-4	-67%
Germany	-7	-15%
India	-15	-42%

Key takeaways:

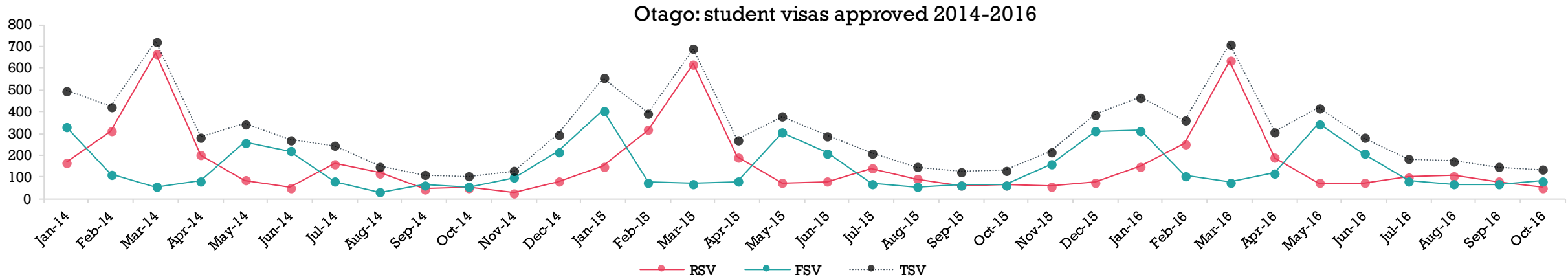
- Northland's TSV YTD are flat (0%, +1). October 2016 saw a decrease in TSV (-56%, -10) driven by the decline in FSV (-75%, -12) compared to October 2015.
- The secondary schools sector showed a decline (-12%) in TSV YTD. The ITP sector saw an overall increase (+9%), driven by an increase in Chinese students. This helped offset the decline in TSV due to fewer visas being approved for Indian students.



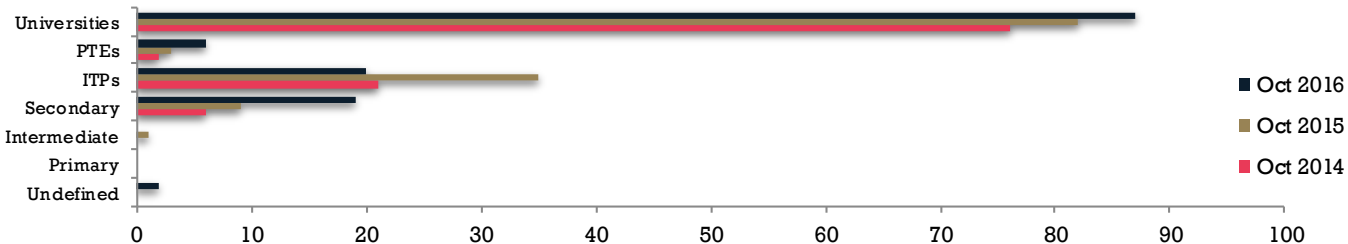
October RSV	October FSV	October TSV
-13 ↓ -20%	17 ↑ 26%	4 → 3%

YTD RSV	YTD FSV	YTD TSV
-74 ↓ -4%	65 ↑ 5%	-9 → 0%

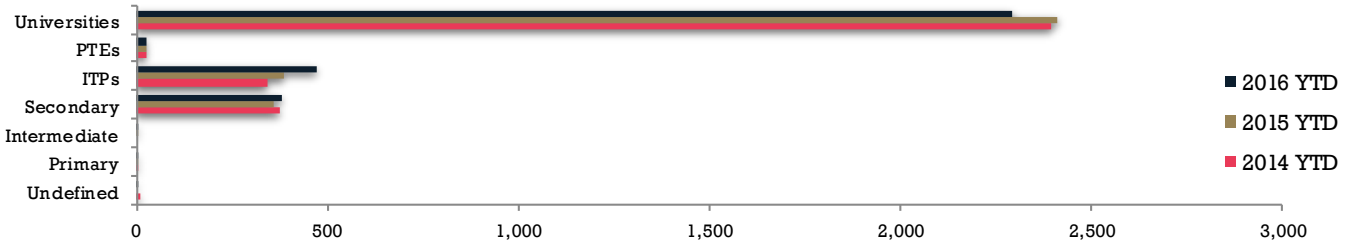
YTD (October)



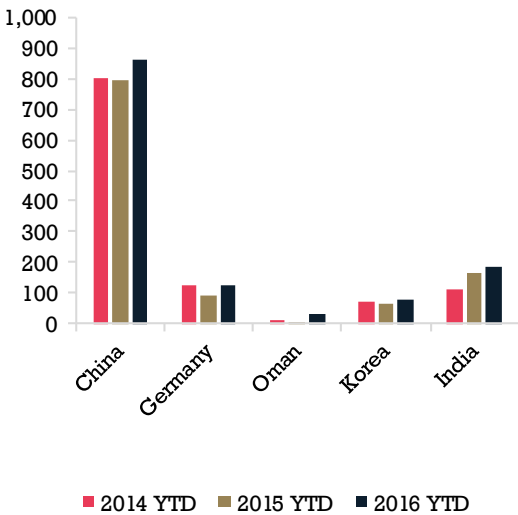
Otago: Total student visas approved by sector, October



Otago: Total student visas approved by sector, YTD



Otago: YTD top five growth markets (TSVs)



Top FSV shifts

October FSV	Change	% change
Oman	15	-
China	5	45%
Philippines	2	-
Pakistan	-2	-100%
Spain	-2	-100%
Germany	-3	-60%

FSVs YTD	Change	% change
Germany	30	41%
China	24	16%
Nepal	16	320%
Japan	-6	-8%
UK	-10	-32%
USA	-68	-13%

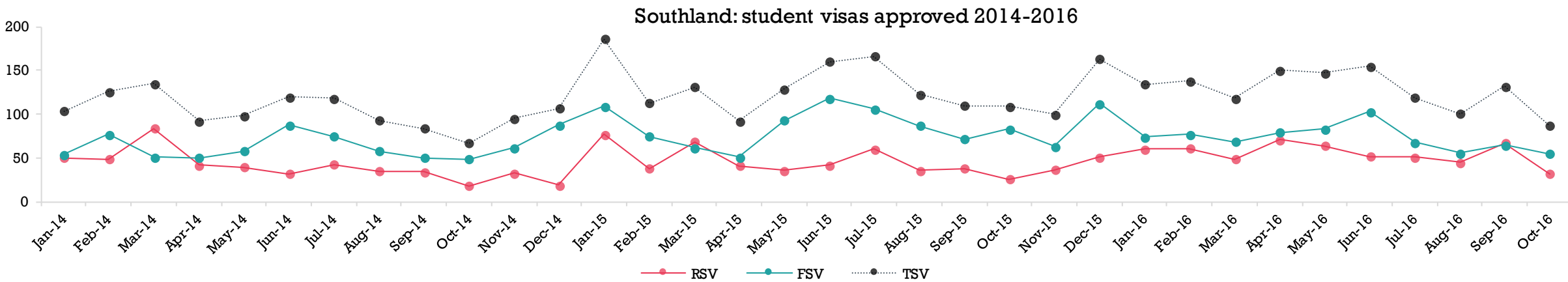
Key takeaways:

- TSV are stable YTD for the Otago region (-0%, -9). The October 2016 result was flat with an increase in FSV (+26%) that help offset the decline in RSV (-20%) compared to October 2015.
- ITPs in the Otago region continue to experience strong growth in TSV YTD (+28%, +85) while the university sector has seen a decline (-5%, -122).
- There has been a decline in TSV 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.

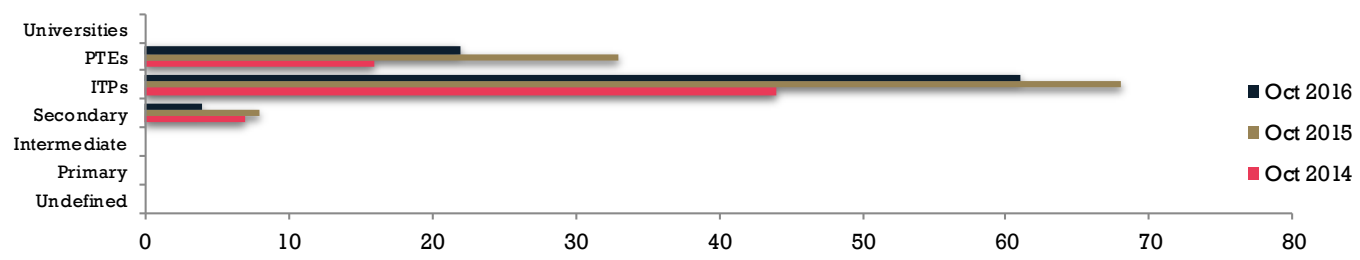


October RSV	October FSV	October TSV
6	-28	-22
↑ 23%	↓ -34%	↓ -20%

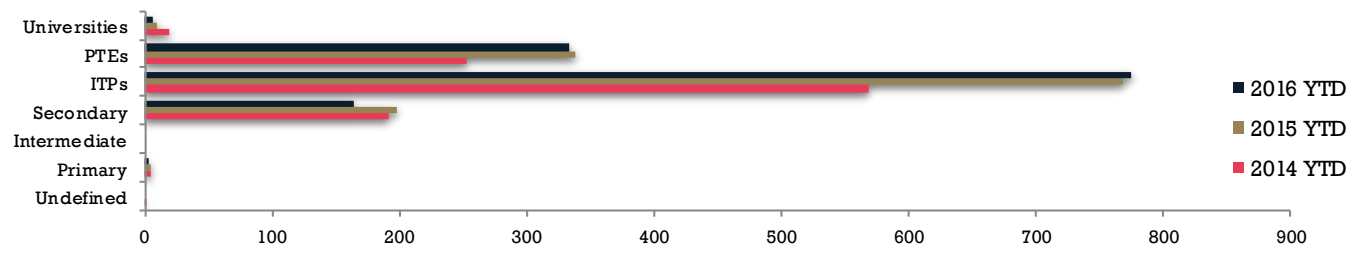
YTD RSV	YTD FSV	YTD TSV
89	-127	-38
↑ 19%	↓ -15%	→ -3%



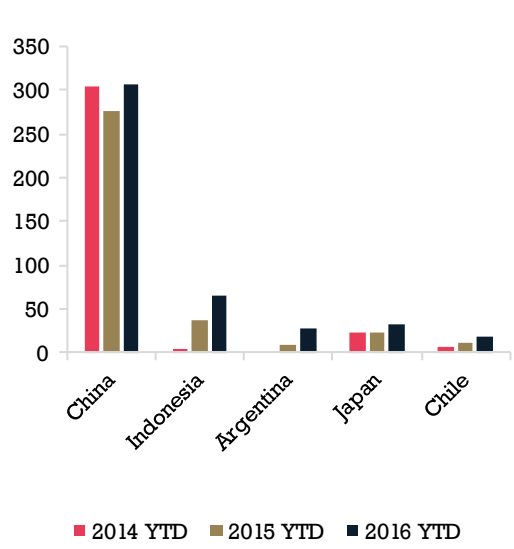
Southland: Total student visas approved by sector, October



Southland: Total student visas approved by sector, YTD



Southland: YTD top five growth markets (TSVs)



Top FSV shifts

October FSV	Change	% change
China	4	67%
Japan	2	-
Saudi Arabia	2	-
Indonesia	-6	-86%
Viet Nam	-6	-86%
India	-14	-67%

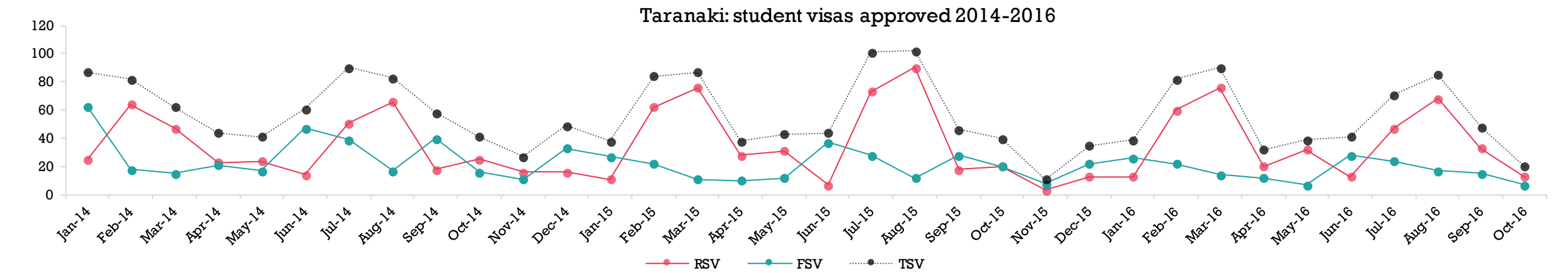
FSVs YTD	Change	% change
Argentina	17	189%
Thailand	11	21%
China	10	12%
Viet Nam	-22	-52%
Brazil	-26	-24%
India	-121	-66%

Key takeaways:

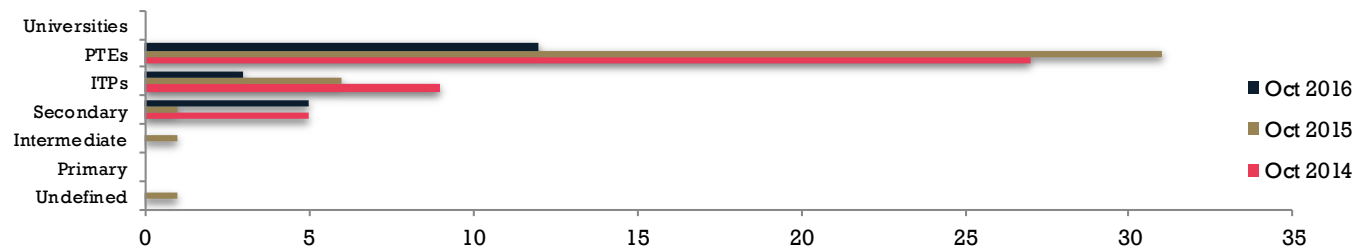
- Southland is experiencing a flat result YTD due to a decline in FSV (-15%, -127) largely driven by India (-121), and growth in RSV (+19%) in the region. The increase in RSV YTD (+89) indicates that students are returning or choosing to remain in New Zealand to study.
- October 2016 TSV results were down (-20%, -22) driven by a decline in FSV (-34%, -28) compared to October 2015.



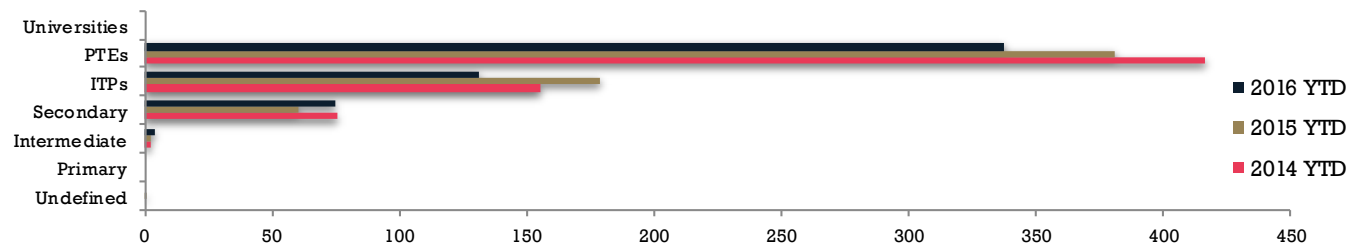
October RSV		October FSV		October TSV		YTD RSV		YTD FSV		YTD TSV	
-7	↓ -35%	-13	↓ -65%	-20	↓ -50%	-41	↓ -10%	-35	↓ -17%	-76	↓ -12%



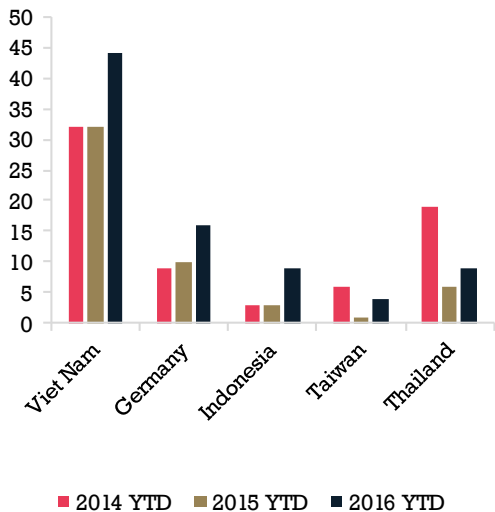
Taranaki: Total student visas approved by sector, October



Taranaki: Total student visas approved by sector, YTD



Taranaki: YTD top five growth markets (TSVs)



Top FSV shifts

October FSV	Change	% change
Germany	2	-
China	1	100%
Korea	1	-
Solomon Islands	-1	-100%
Viet Nam	-1	-100%
India	-14	-93%

FSVs YTD	Change	% change
Viet Nam	8	400%
China	5	21%
Germany	5	50%
South Africa	-2	-100%
Philippines	-5	-100%
India	-56	-45%

Key takeaways:

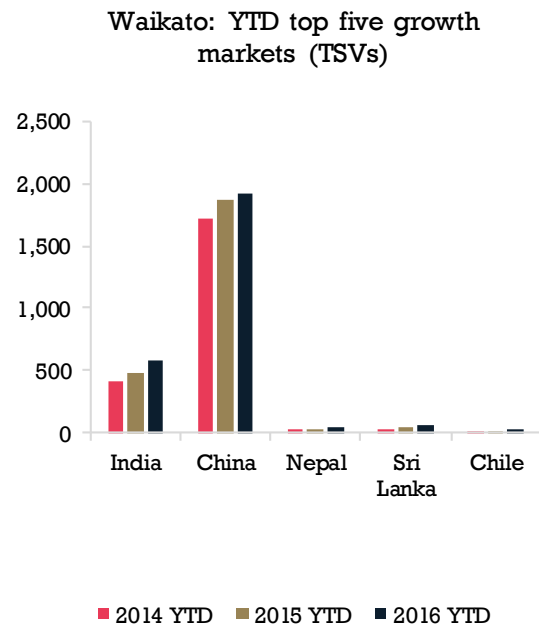
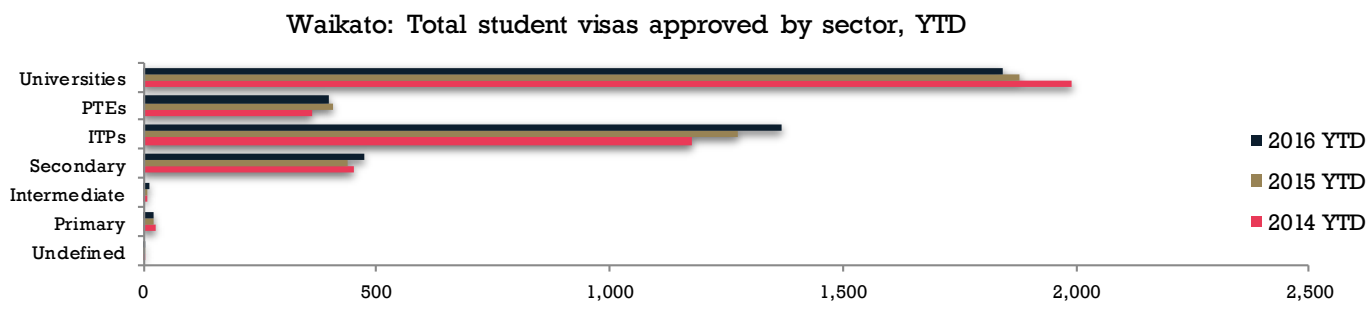
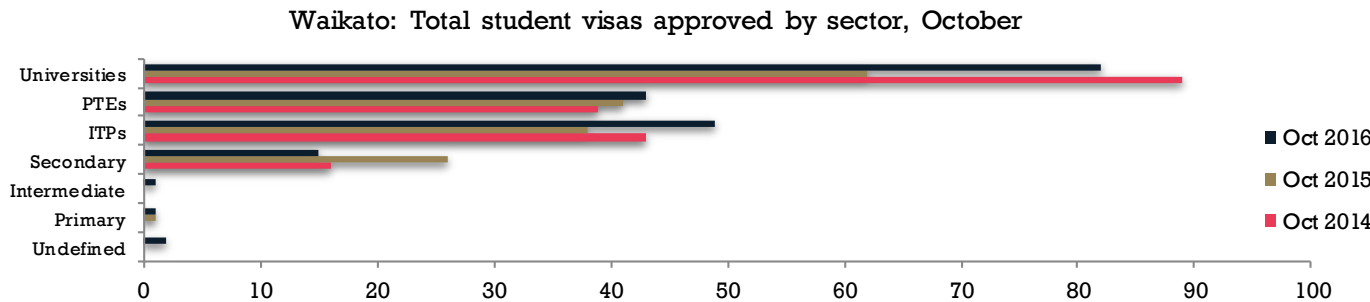
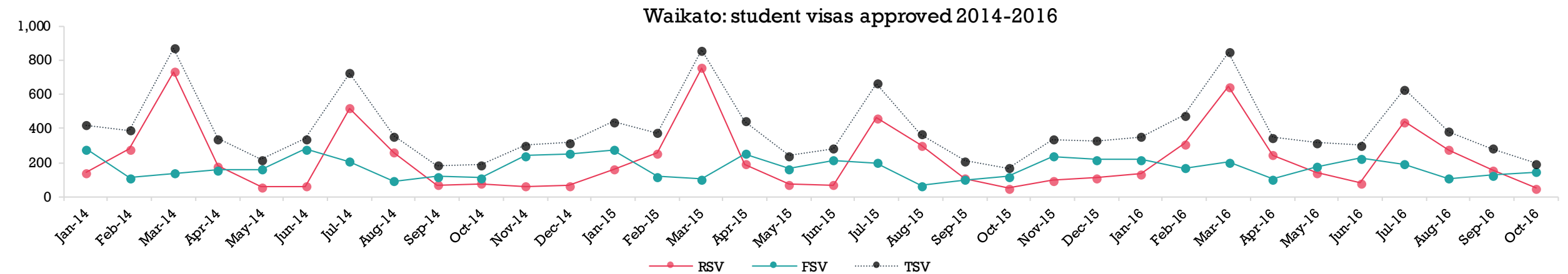
- Taranaki's results are in decline YTD being driven by the decline in RSV (-10%, -41) and FSV (-17%, -35) compared to the same time last year.
- The PTE and ITP sector have experienced the largest decline in TSV approved YTD (-12% and 27%) driven by the decline from India and the Philippines.
- Secondary schools results are up (+25%) YTD on 2015.



October RSV	October FSV	October TSV
-2 ➡ -4%	27 ⬆ 23%	25 ⬆ 15%

YTD RSV	YTD FSV	YTD TSV
38 ➡ 2%	51 ➡ 3%	89 ➡ 2%

YTD (October)



Top FSV shifts		
October FSV	Change	%change
India	21	111%
UK	10	83%
Oman	8	100%
Germany	-5	-71%
Japan	-6	-75%
China	-11	-29%

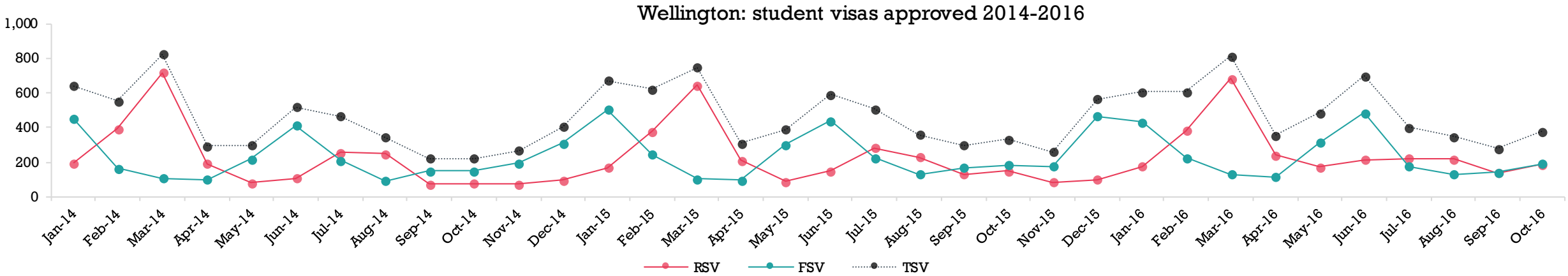
FSVs YTD		
FSVs YTD	Change	%change
India	69	25%
Oman	20	222%
Nepal	19	380%
Tonga	-9	-82%
Korea	-12	-22%
China	-48	-9%

- Key takeaways:
- Overall results for the Waikato region are stable YTD (+2%, +89).
 - October 2016 TSV results were up (+15%, +25) driven by an increase in FSV (+23%, +27) compared to October 2015.

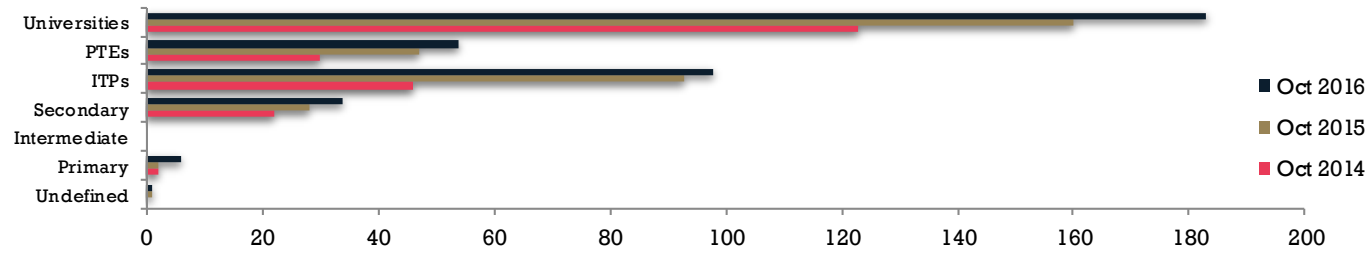


October RSV	October FSV	October TSV
38 26%	7 4%	45 14%

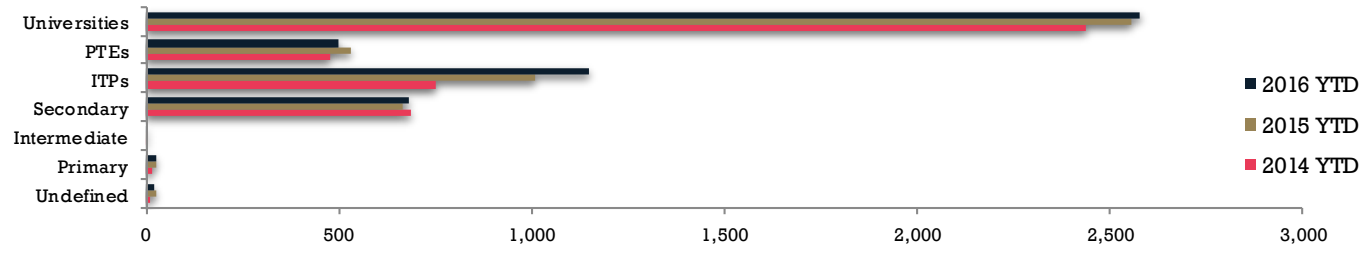
YTD RSV	YTD FSV	YTD TSV
210 9%	-67 -3%	143 3%



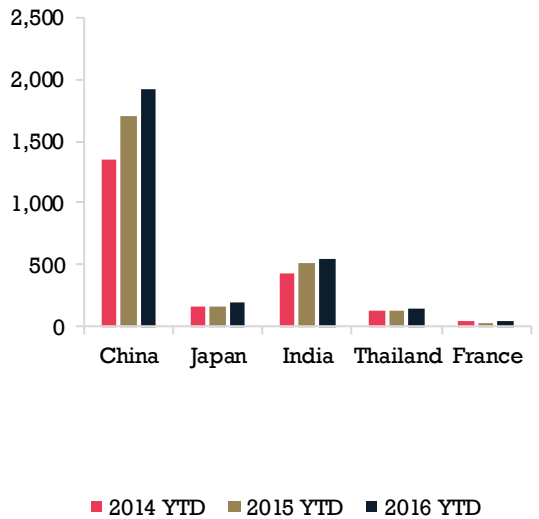
Wellington: Total student visas approved by sector, October



Wellington: Total student visas approved by sector, YTD



Wellington: YTD top five growth markets (TSVs)



Top FSV shifts

October FSV	Change	%change
China	25	44%
Philippines	6	600%
Korea	4	133%
Laos	-4	-57%
Myanmar	-7	-100%
India	-9	-21%

FSVs YTD	Change	%change
Japan	34	30%
Thailand	24	57%
China	22	4%
Brazil	-30	-35%
India	-33	-10%
USA	-59	-20%

Key takeaways:

- TSV YTD for Wellington are up slightly (+3%, +143) despite a decline in FSV (-3%, -67) which has been offset by the increase in RSV YTD (+9%, +210).
- October 2016 results were positive driven by an increase in RSV (+26%, +38) and FSV (+4%, +7) compared to October 2015.
- The growth in TSV YTD is occurring in the ITP (+14%, +140) sector.