International Student Numbers

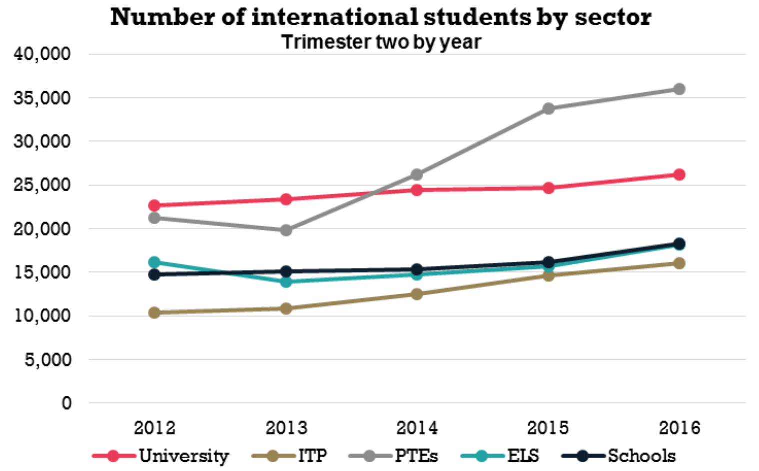
114,312 International students January to August 2016

Overview

Overall there was a 9% (+9,812) increase in international students[1] compared to the same period in 2015. All sectors experienced an increase in international students for the January to August 2016 period (T2).

Student numbers by sector[2]

	Primary schools	Secondary schools	ITP	Universities	PTE (funded)	PTE (unfunded)	ELS
Number Students	2,672	15,644	15,971	26,231	14,580	21,458	18,148
Change Number	335	1,799	1,352	1,525	537	1,734	2,532
Change Percent	14%	13%	9%	6%	4%	9%	16%



Students in trimester two of 2016 have increased for all sectors compared to trimester two of 2015. English language schools have shown the greatest increase (+16%, +2,532). Most of this increase has been concentrated in Auckland.

Outlook

All sectors, particularly schools and English language schools, are continuing to grow, and we expect this to remain the case for the remainder of the year.

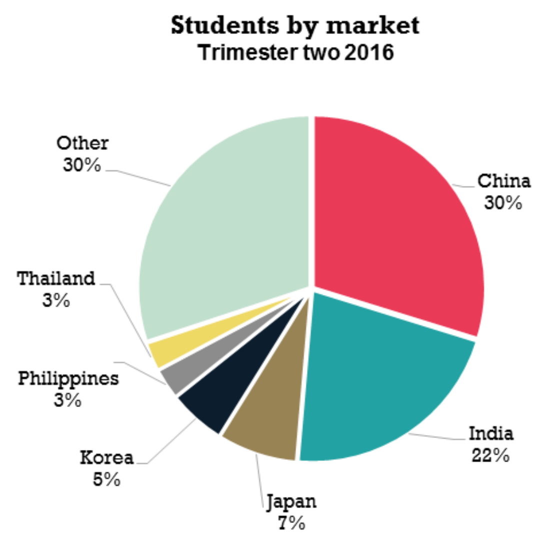
Total Student Visas (TSV) year to date (YTD) are 4% down on 2015 due to a -13% decrease in Indian and Filipino First Time Student Visas (FSV) YTD. This decrease in FSV has yet to show as a decrease in in student numbers because the decreases in Indian first time students have largely been offset by Indians continuing to study in New Zealand, and an increase in Chinese students at universities and PTEs[3].

It is anticipated that 2016 student numbers will be up 5-10% on 2015 numbers.

Despite the increase in students for all sectors, current visa numbers are suggesting that student numbers may be the same or slightly fewer in 2017.

Key market trends

52% of international students came from China and India for T2 2016.

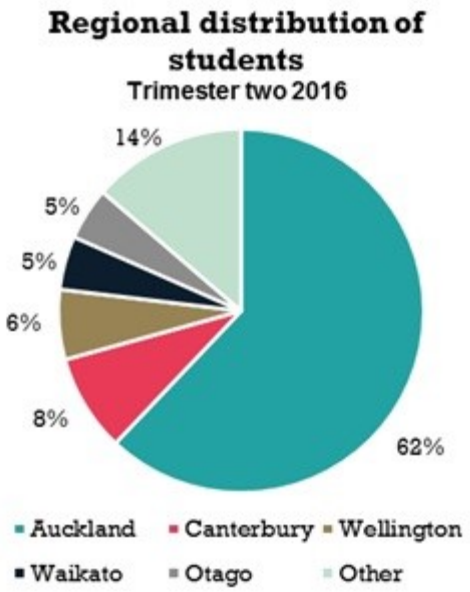


China +14% (+4,133). All sectors grew except ITP, which was flat.

India +6% (+1,304). All sectors grew, except PTEs. Both funded and unfunded PTEs declined by -2%, as the change in rule 18 began to impact student numbers.

Japan +9% (+697) saw mixed results across sectors. ELS, universities, and secondary schools grew while funded PTE, ITPs, and primary schools declined.

Regional variation



Auckland continues to be the preferred place to study for international students[4].

The Auckland region was up +10% (+6,423). Growth was in all sectors apart from the funded PTE sector, which remained flat. Significant increases were in the ELS (+20%,+2,202), unfunded PTE (+9%, +1,436), universities (+7%, +886) and ITP (+16%,+872) sectors.

The Canterbury region was up (+9%, +865). This was driven by the universities (+16%, +443) and PTE (unfunded) (+14%, +241) sectors.

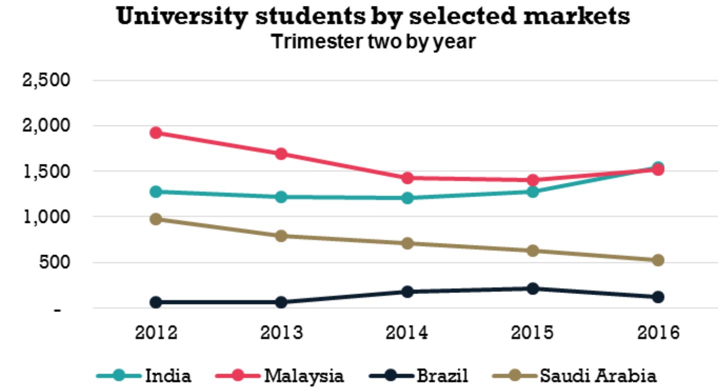
Students in the Wellington region increased +12% (+770). Growth came from the secondary school (+29%, +280), ITP (+16%, +195) and universities (+6%, +193) sectors.

Manawatu-Wanganui region saw the only decline of over 100 people (-5%, -143). This was driven by funded PTEs, which declined by -32% (-203), driven by students from India (-58%, -57), and Japan (-22%, -53). The universities sector also declined by -6% (-90), but this is partially offset by increases in secondary schools (+16%, +82) and ITPs (+20%, +51).

Universities

There were **26,231** international students studying at universities for T2 of 2016. The sector grew by +6% (+1,525) compared to the same time period in 2015.

Key market trends: China (+10%, +977), India (+20%, +262) and Malaysia (+9%, +121) showed increases. Brazil (-43%, -93) and Saudi Arabia (-16%, -103) showed declines. China has shown significant annual increases in this sector since 2012, and is not included on the graph because the number of Chinese students (11,172) masks changes in other markets.



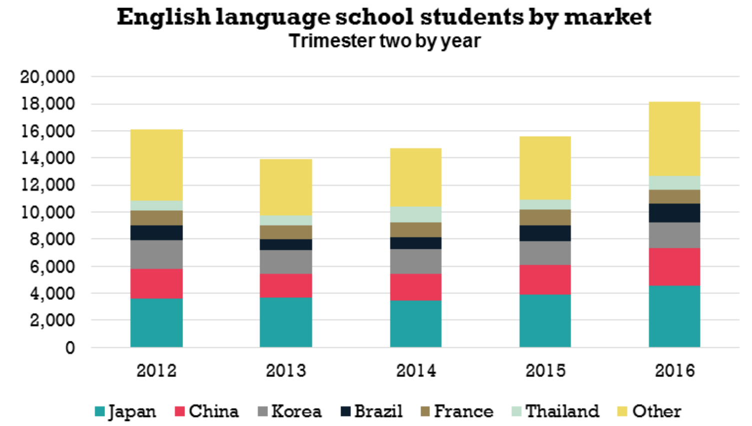
Level of study: Level 9 Masters' degrees increased by 15%.

Regional distribution: 50% of students in the universities sector studied in the in the Auckland region, followed by Canterbury and Wellington with 12% each.

English language schools (ELS)

There were **18,148** international students in the ELS sector in T2, an increase (+16%, +2,532) compared to the same period in 2015.

Key market trends: Japan[5] (+17%, +680), China (+27%, +587), Thailand (+32%, +239) and Brazil (+16%, +192) all showed increases.



Regional distribution: The majority of ELS sector students studied in the Auckland region (72%), followed by Canterbury (7%), Wellington, Bay of Plenty and Otago (all 5%).

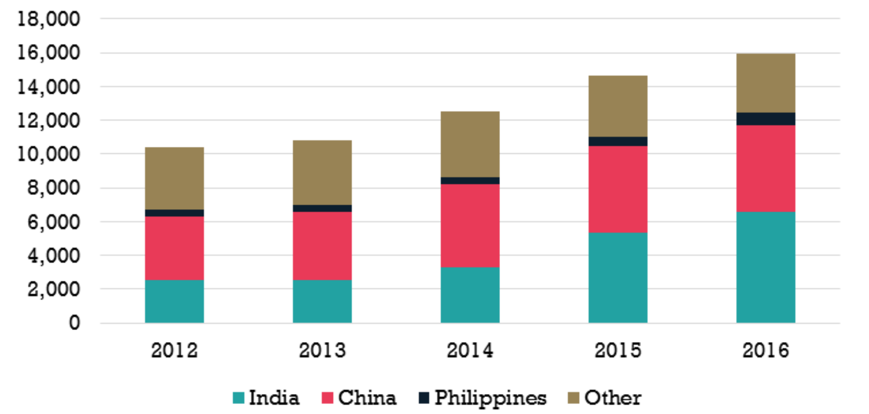
[1] The international student count adds together students studying in schools, students studying in the government tertiary sector and students studying in privately owned training institutions. Key market trends count the same students. [2]Primary schools includes: Full Primary, Contributing Primary, and Intermediate. Secondary schools Includes Special, Secondary School (Year7 - Year13), Composite School (Year1 - Year13) , Restricted Composite School , and Secondary School (Year9 - Year13). ITP are Institutes of Technology and Polytechnics. PTE are private training institutes, which are privately owned tertiary institutions. PTE(funded) refers to PTEs which receive funding for eligible domestic students. PTE(unfunded) refers to PTEs which do not receive government funding and which are not ELS. ELS is English Language Schools, which are private training establishments which solely teach English and are a subset of unfunded private training establishments. One student can be involved in more than one subsector within this enrolment period. This means that the numbers in these tables do not add up to 14, 312. This table does not include wananga (numbering seven students). [3]Student visa trends have traditionally been a lead indicator of international student numbers. Year-to-date (January to October), first time student visas (FSV) are down 13% with (-4,963) fewer FSV approved compared to 2015. [4] Regional numbers add to more than 14, 312 because some students study in more than one region [5]The increase in Japanese students may reflect a push by the Japanese government to increase English language skills, and ENZ in-market activity.

Institutes of technology and polytechnics (ITP)

There were **15,971** international students in the ITP sector (+9%, +1,352).

Key market trends: Increases were seen for India (+22%, +1,197) and the Philippines (+31%, +179) while Saudi Arabia (-29%, -111) continued to be in decline.

ITP students by market
Trimester two by year

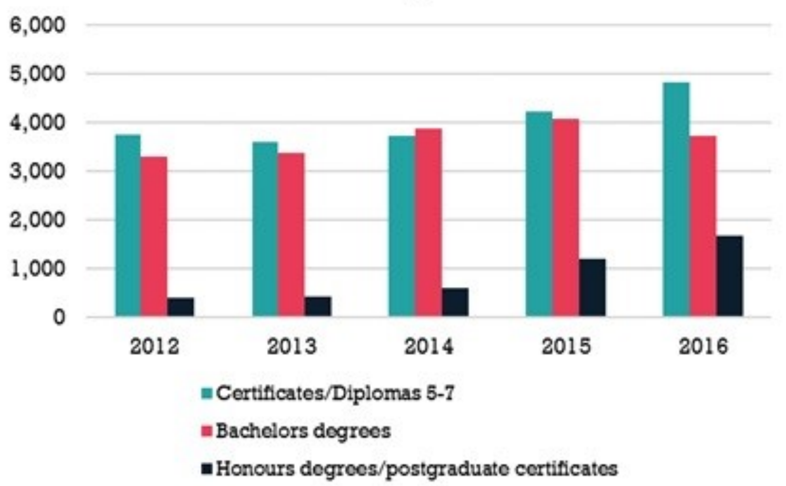


Level of study*: Between 2015 and 2016, students studying towards Level 5-7 certificates/diplomas increased by +15% for T2. This was driven by India which had a +17% increase in Level 5-7 certificates/diplomas.

Students studying towards honours and postgraduate certificate programmes increased by +40% compared to the same period in 2015.

Students studying towards bachelor level programmes have been experiencing a -8% decline since T2 of 2014.

ITP students by selected levels of study
Trimester two by year



Regional growth: Students studying.in the Auckland region were up (+16%, +872), Bay of Plenty (+20%, +263) and Wellington (+16%, +195).

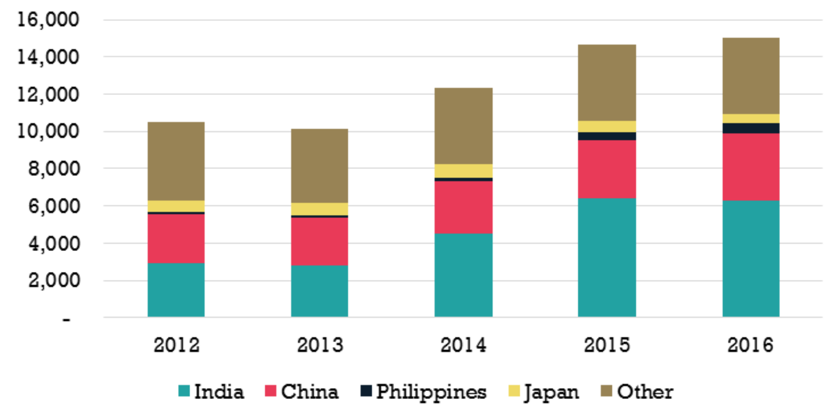
Regional distribution: 39% of ITP students are in the Auckland Region, 10% are in the Bay of Plenty, 9% are in Wellington, and 7% are in Canterbury.

Private training establishments (PTE) sector (funded)

There were **14,580** International students studying in the PTE sector (funded) during T2 and increased +4% (+537) compared to 2015.

Key market trends: Markets with significant growth were China (+14%, +453) and the Philippines (+39%, +163) and decreases came from India (-2%, -136) and Japan (-25%, -150).

Funded PTE students by market
Trimester two by year



Level of study: The majority of students (69%) studied towards Level 5-7 certificates/diplomas programmes during T2.

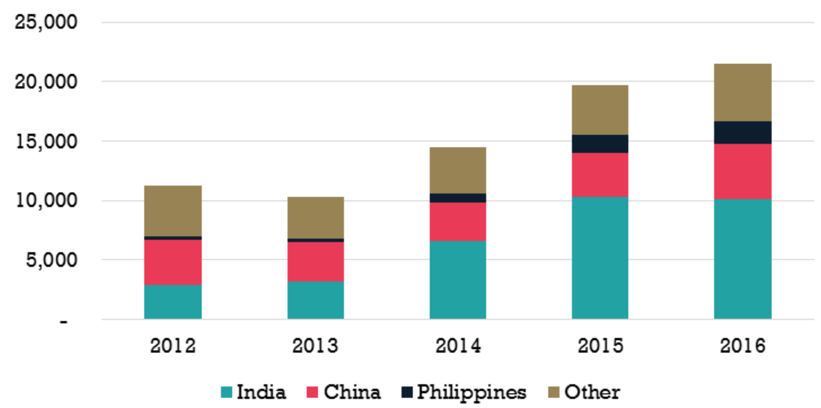
Regional distribution: Auckland had 76% of students in funded PTEs followed by Canterbury with 6% of students.

Private training establishments sector (unfunded)

There were **21,458** international students studying in the PTE sector (unfunded) which experienced a +9% (+1,734) increase in students in T2.

Key market trends: Increases were seen for China (+26%, +966), Philippines (+24%, +353), Brazil (+90%, +195). India (-2%, -175) had the most significant decrease, which may reflect changes from rule 18 implementation .

Non-funded PTE students by market
Trimester two by year



Regional distribution: 83% of international students in the PTE (unfunded) sector are in the Auckland region followed by 9% in Canterbury.

Schools sector

Primary schools

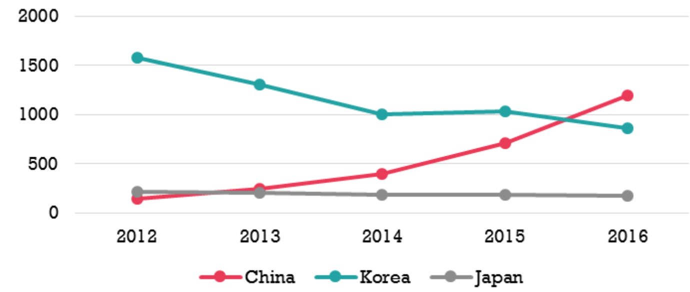
There were **2,672** international students in the primary and intermediate school sectors, an increase of (+14%, +335) compared to the same period in 2015.

Key market trends: The main markets for this sector are China (45% of students) Korea (32%) and Japan (7%). The main driver of growth in this market is China, which increased by +70% (+493). This growth has been slightly offset by a decline in the Korean market (-17%, -172).

The Korean market has been declining due to the Korean economy, and improved domestic English teaching capability. The decline may be offset by an expected increase in school trips to New Zealand, which will not show up in this data.

Regional distribution: The Auckland region was host to the majority of students (67%) followed by Bay of Plenty (11%), Waikato (6%), and Canterbury (6%).

Primary and intermediate students by selected markets
Trimester two by year



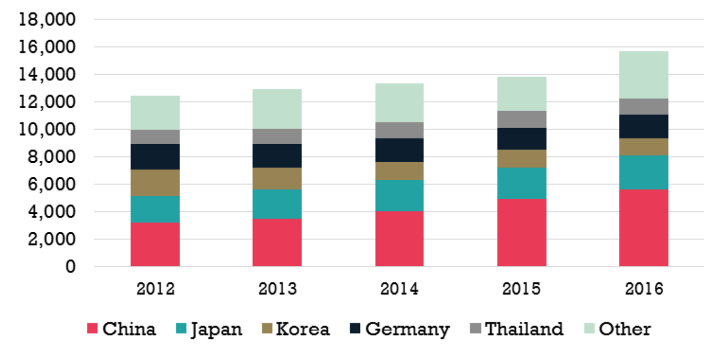
Secondary schools

There were **15,644** international students in the secondary school sector in T2. The sector also saw strong growth up +13% (+1,799) on the same period in 2015.

Key market trends: China (+14% +669), France (+98%, +159), Germany (+10%, +159), and Japan (+9%, +195) all showed increases in student numbers for this sector while Thailand (-7%, -86) and Chile (-27%, -50) showed decreases.

Regional distribution: The Auckland region hosted 54% of students in the secondary school sector followed by Canterbury (10%) and Wellington (8%).

Secondary students by market
Trimester two by year



Developed by Education New Zealand
It combines the data sources from the Ministry of Education: the Single Data Return (SDR) data for unfunded PTE and ELS and the Export Education Levy for all other sectors. Link to data source: student numbers (www.educationcounts.govt.nz).
Outlook: Immigration New Zealand Student Visas Data

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