

Student Visa Dashboard November 2015

Regional and sector overview



Introduction

- *The Regional Student Visa Dashboard is a new intelligence product developed by Education New Zealand to provide timely and relevant international student data to the international education industry. It presents and analyses New Zealand's regional international student visa trends, providing a monthly round up of where in New Zealand international students are choosing to study, and what sectors they're in by region.*
- *The Regional Student Visa Dashboard complements the existing [Market Student Visa Dashboard](#), which provides analysis of INZ data by market and sector across the whole of New Zealand.*
- *Student visas are the most readily available international student data, as there is only a one month lag between student visas being approved and Immigration New Zealand (INZ) publishing the data. Student visa data is a strong indicator of whether students are entering, remaining in, or leaving New Zealand. This provides a useful predictor for future enrolment trends.*
- *Student visa trends allow us to analyse two key indicators:*
 - *growth of new student numbers (first time student visas)*
 - *retention of international students within New Zealand (returning student visas)*
- *First time student visas are an indicator of growth as they represents new students entering the international education pipeline. This information can be a useful indicator for industry on efforts to attract new international students.*
- *The number of total student visas includes first time student visas, and returning student visas. The number of returning student visas can provide a useful indicator to industry of students' experiences in New Zealand, and their desire to continue their studies here.*
- *ENZ utilises its knowledge of the global international education market and available data to provide a range of intelligence services and products to New Zealand's international education industry, helping the industry identify growth opportunities. ENZ welcomes feedback on this Dashboard. Please email intelligence@enz.govt.nz.*

Caveats and notes

- **Measure:**
 - The Dashboard measures the volume of student visas approved between 1 January to the end of the month specified on the cover page.
- **Student visas vs. visitor visas:**
 - Total student visas (TSV), first time student visas (FSV), and renewed student visas (RSV) 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 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.
 - This will impact the Private Training Establishments (including English Language Schools) numbers.
- **Student visas vs. enrolments:**
 - There is potential delay of up to three months between students having their visas approved and actual entry into New Zealand, therefore the figures shown here may not necessarily represent the actual number of students currently in New Zealand.
- **Methodology:**
 - The following Dashboard's methodology has been revised to exclude dependants, applicants under Section 61, and Variation of Conditions. Dashboards prior to May 2015 include approvals from "all" applicants, including dependants.
- **Work in progress:**
 - ENZ is currently working on:
 - Understanding the true demand of student visas – i.e. TSV applications vs. TSVs approved
 - Understanding the correlation between ENZ activity and policy changes on FSV trends
 - Understanding the impact of RSV on overall trends
 - Further work is being undertaken to understand a relatively large number of "not recorded" entries for FSVs at the provider level
 - Further analysis is being undertaken on understanding the correlation between student visas and enrolments



Key trends

YTD

- Growth in total student visas (TSV) has been driven by the Auckland (up 15%), Canterbury (up 14%), Waikato (up 6%) and Wellington (up 9%) regions.
- Growth in the Auckland and Canterbury regions has been driven by the PTE sector (up 18% and 19%) YTD.
- YTD TSVs increased by 13% (9,727) and first time student visas (FSV) increased by 12% (4,357). Returning student visas also increased by 14% (5,370).
- The ITPs, PTEs, and universities have experienced the strongest YTD growth in FSVs, up 41% (1,952), 9% (1,513), and 8% (649).

November

- November student visa approvals increased by 9% (435) increase in TSVs and by 4% (120) in FSVs on 2014.
- November TSV growth was driven by Auckland (up 7%), Otago (up 64%) and Waikato (up 15%).
- All sectors experienced growth in TSVs in November except for the primary schools.

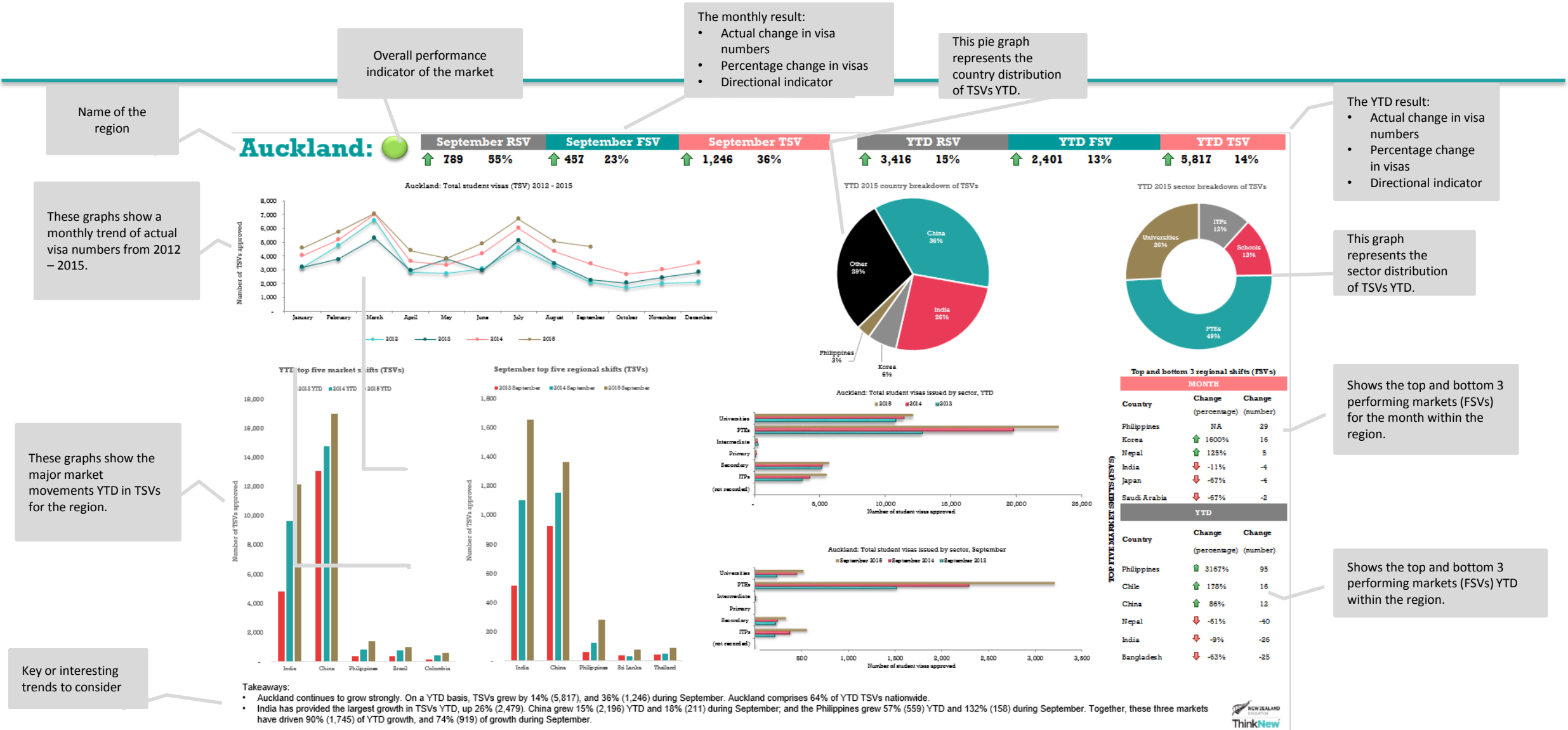
	TSVs for November	Change	% change
Increases	Auckland	225	7%
	Otago	99	64%
	Waikato	57	15%
	Canterbury	41	10%
	Hawke's Bay	27	68%
Decreases	Taranaki	-16	-59%
	Nelson	-19	-20%

	FSVs for November	Change	% change
Otago	66	57%	
Waikato	27	9%	
Auckland	25	1%	
Canterbury	17	6%	
Hawke's Bay	17	74%	
Bay of Plenty	9	10%	
Wellington	-13	-7%	
Nelson	-14	-18%	

	Sector TSVs for November	Change	% change
Universities	216	25%	
Secondary	76	9%	
ITPs	73	14%	
PTEs	59	2%	
Intermediate	3	10%	
Primary	-5	-16%	

	Sector FSVs for November	Change	% change
Universities	106	18%	
Secondary	48	8%	
ITPs	12	3%	
Primary	-3	-17%	
Intermediate	-8	-40%	
PTEs	-46	-3%	

How to read the dashboard



Overall YTD regional performance

(Listed in order of 2015 volume)

Indicator	YTD TSVs	2014	2015	Change in numbers	% change	Indicator	YTD FSVs	2014	2015	Change in numbers	% change
●	Auckland	46,734	53,761	7,027	15%	●	Auckland	22,216	25,035	2,819	13%
●	Canterbury	6,548	7,469	921	14%	●	Canterbury	3,268	3,674	406	12%
●	Waikato	5,290	5,585	295	6%	●	Waikato	2,520	2,758	238	9%
●	Wellington	4,648	5,077	429	9%	●	Wellington	2,237	2,575	338	15%
●	Otago	3,658	3,873	215	6%	●	Otago	1,671	1,917	246	15%
●	Manawatu	2,442	2,407	-35	-1%	●	Bay of Plenty	989	1,074	85	9%
●	Bay of Plenty	1,615	1,933	318	20%	●	Manawatu	959	946	-13	-1%
●	Southland	760	960	200	26%	●	Nelson	604	646	42	7%
●	Nelson	812	932	120	15%	●	Southland	390	571	181	46%
●	Hawke's Bay	662	744	82	12%	●	Hawke's Bay	386	422	36	9%
●	Taranaki	676	633	-43	-6%	●	Undefined	249	362	113	45%
●	Undefined	327	503	176	54%	●	Northland	311	260	-51	-16%
●	Northland	409	425	16	4%	●	Taranaki	303	214	-89	-29%
●	Gisborne	32	25	-7	-22%	●	Marlborough	3	12	9	300%
●	Marlborough	5	15	10	200%	●	Gisborne	14	9	-5	-36%
●	Grand Total	74,627	84,354	9,727	13%	●	Grand Total	36,127	40,484	4,357	12%

Overall YTD market performance

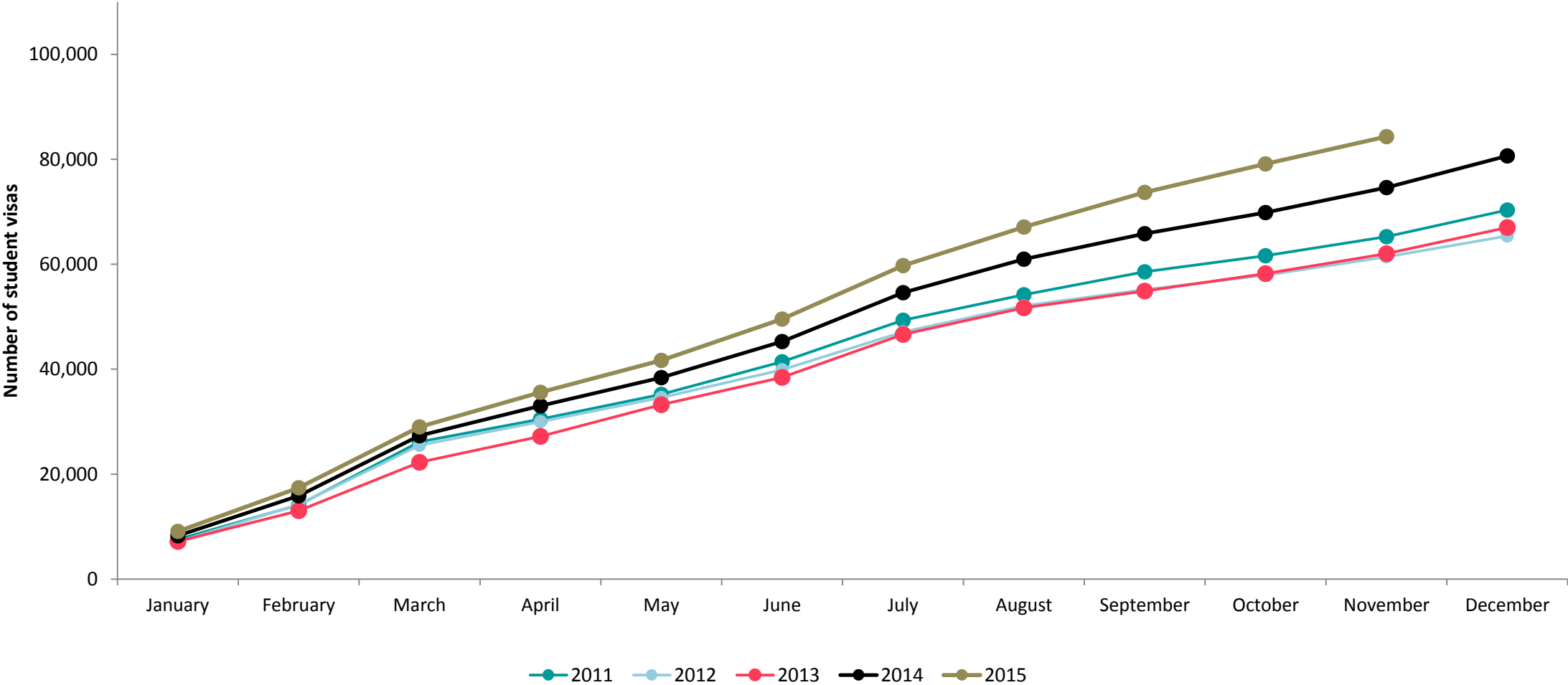
(Listed in order of 2015 volume)

Indicator	YTD TSVs	2014	2015	Change in numbers	% change
●	China	24,031	27,771	3,740	16%
●	India	16,245	20,092	3,847	24%
●	Korea	4,640	4,537	-103	-2%
●	Japan	2,903	2,852	-51	-2%
●	Philippines	1,318	2,555	1,237	94%
●	USA	1,886	2,298	412	22%
●	Thailand	2,075	2,127	52	3%
●	Saudi Arabia	2,471	1,981	-490	-20%
●	Brazil	1,494	1,747	253	17%
●	Viet Nam	1,571	1,510	-61	-4%
●	Germany	1,578	1,438	-140	-9%
●	Malaysia	1,299	1,373	74	6%
●	Hong Kong	1,019	1,060	41	4%
●	Sri Lanka	664	880	216	33%
●	Colombia	666	865	199	30%
●	Fiji	860	795	-65	-8%
●	Taiwan	819	794	-25	-3%
●	Nepal	774	729	-45	-6%
●	Indonesia	622	713	91	15%
●	Russia	596	596	0	0%
●	Grand Total	74,627	84,354	9,727	13%

Indicator	YTD FSVs	2014	2015	Change in numbers	% change
●	India	11,152	12,137	985	9%
●	China	6,843	8,110	1,267	19%
●	Philippines	1,093	2,313	1,220	112%
●	USA	1,573	2,007	434	28%
●	Korea	1,825	1,808	-17	-1%
●	Japan	1,614	1,611	-3	0%
●	Brazil	1,285	1,448	163	13%
●	Germany	1,339	1,235	-104	-8%
●	Thailand	1,039	973	-66	-6%
●	Colombia	541	651	110	20%
●	Malaysia	345	513	168	49%
●	Viet Nam	481	507	26	5%
●	Sri Lanka	283	503	220	78%
●	Chile	338	418	80	24%
●	Great Britain	354	393	39	11%
●	Nepal	586	336	-250	-43%
●	Indonesia	286	325	39	14%
●	France	343	318	-25	-7%
●	Saudi Arabia	546	305	-241	-44%
●	Bangladesh	219	302	83	38%
●	Grand Total	36,127	40,484	4,357	12%

Overall YTD tracker

Cumulative total



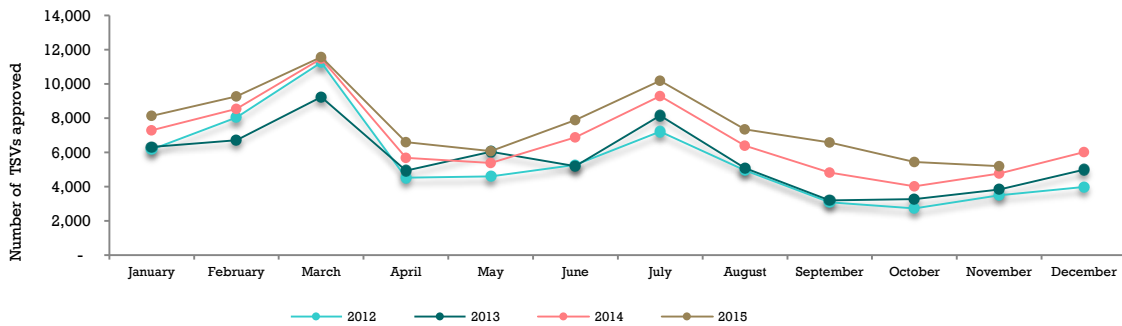
Takeaways:

- 2015 is tracking strongly above previous years and TSVs are up 13% (9,727) YTD.

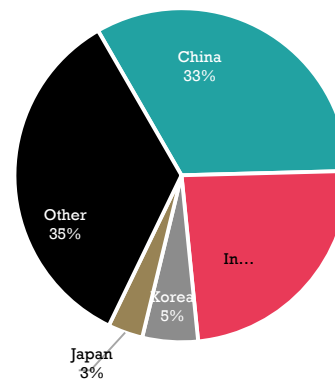
November RSV	November FSV	November TSV
 315 20%	 120 4%	 435 9%

YTD RSV	YTD FSV	YTD TSV
 5,370 14%	 4,357 12%	 9,727 13%

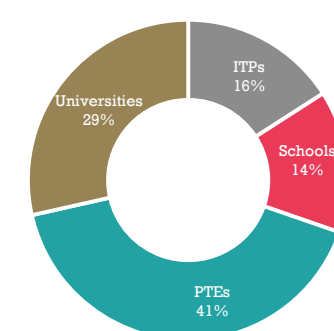
Overall: Total student visas (TSVs) 2012 - 2015



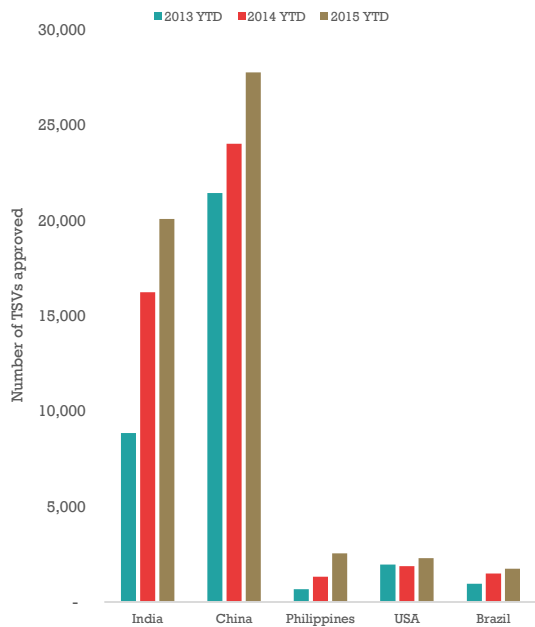
YTD 2015 country breakdown of TSVs



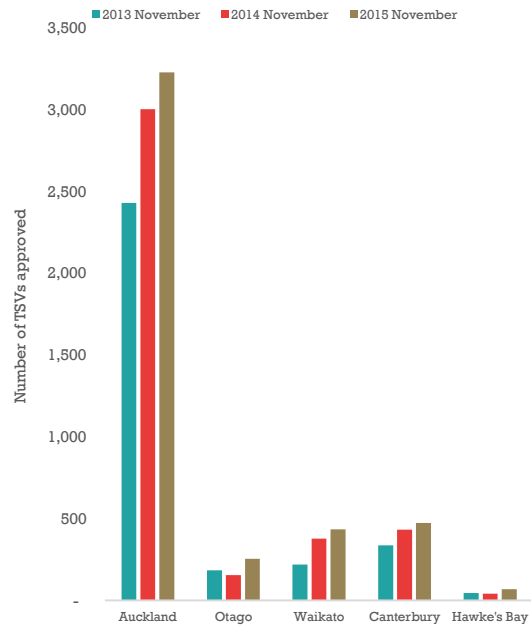
YTD 2015 sector breakdown of TSVs



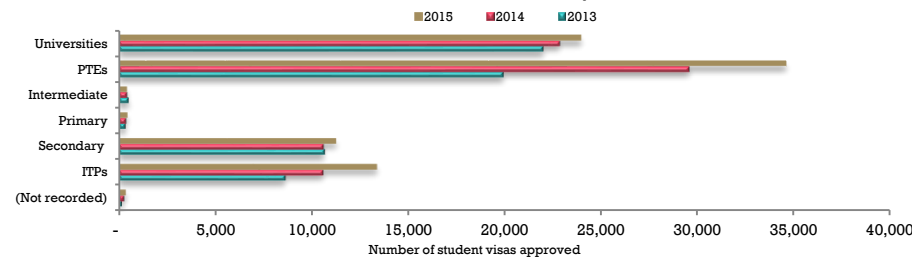
YTD top five regional shifts (TSVs)



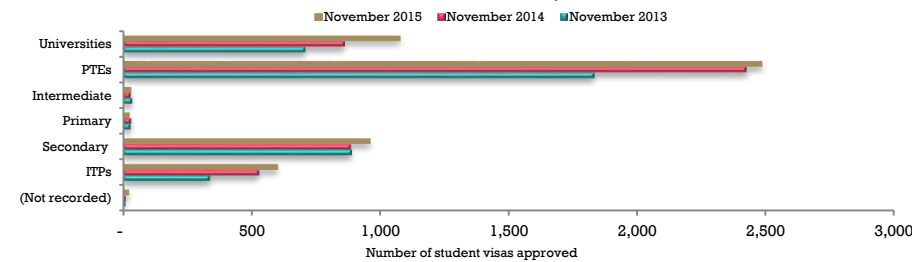
November top five regional shifts (TSVs)















Overall: Total student visas issued by sector, YTD



Overall: Total student visas issued by sector, November



Top and bottom 5 regional shifts (FSVs)

Country	MONTH	
	Change (percentage)	Change (number)
USA	 133%	104
China	 11%	71
Brazil	 126%	59
India	 -11%	-103
Japan	 -24%	-57
Viet Nam	 -49%	-38
Country	YTD	
	Change (percentage)	Change (number)
China	 19%	1267
Philippines	 112%	1220
India	 9%	985
Nepal	 -43%	-250
Saudi Arabia	 -44%	-241
Germany	 -8%	-104

TOP FIVE MARKET SHIFTS (FSVs)

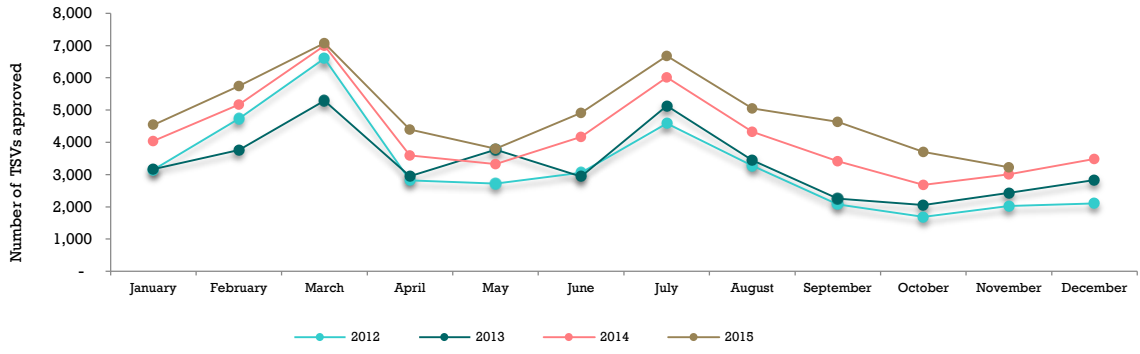
Takeaways:

- YTD TSVs continue to grow, up 13% (9,272) and FSVs up 12% (4,357) YTD.
- November results were positive with RSVs up 20% (315) and FSVs flat 4% (120).
- Other regions that have grown strongly YTD in TSVs include: Wellington, up 9% (429); Bay of Plenty, up 20% (318); and Waikato, up 6% (259).

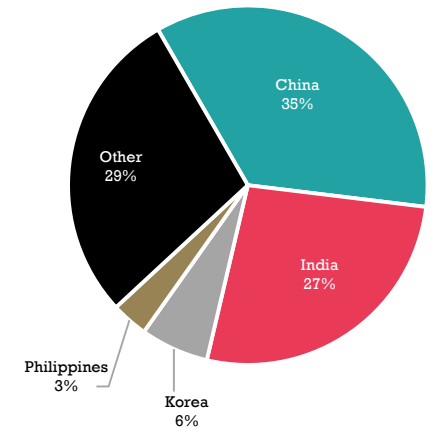
Auckland:

November RSV ↑ 200 18%	November FSV → 25 1%	November TSV ↑ 225 7%	YTD RSV ↑ 4,208 17%	YTD FSV ↑ 2,819 13%	YTD TSV ↑ 7,027 15%
----------------------------------	--------------------------------	---------------------------------	-------------------------------	-------------------------------	-------------------------------

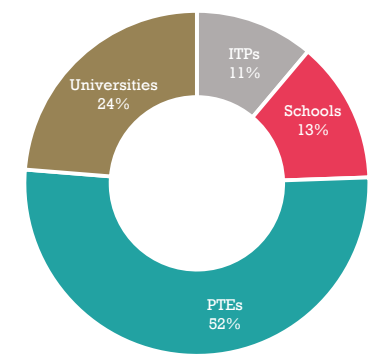
Auckland: Total student visas (TSVs) 2012 - 2015



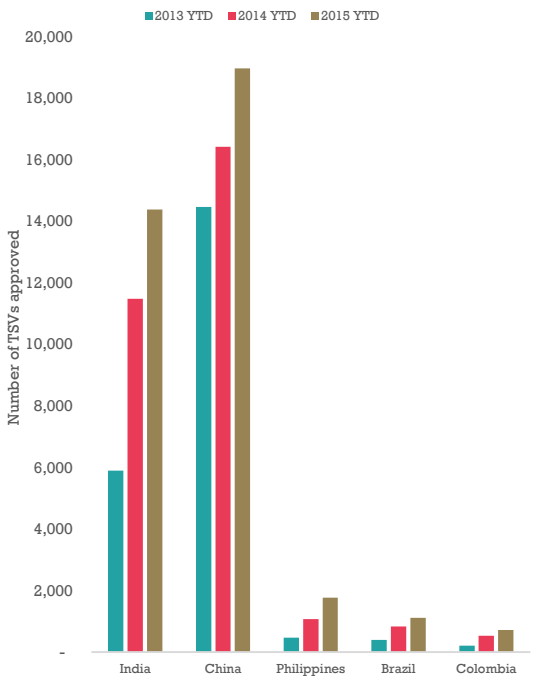
YTD 2015 country breakdown of TSVs



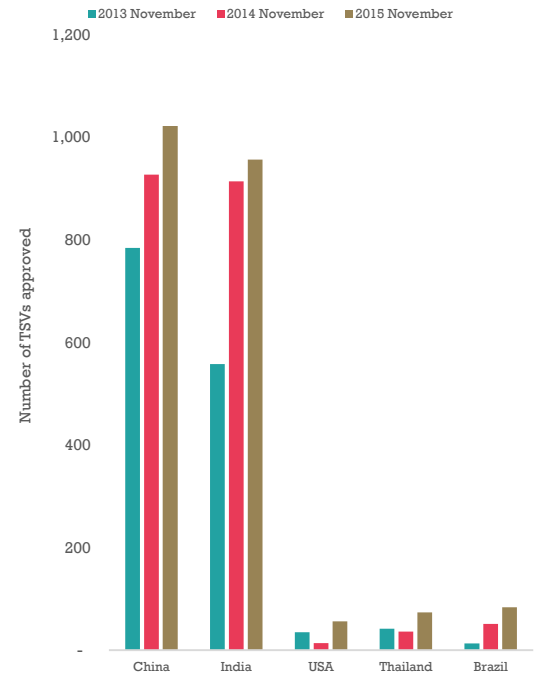
YTD 2015 sector breakdown of TSVs



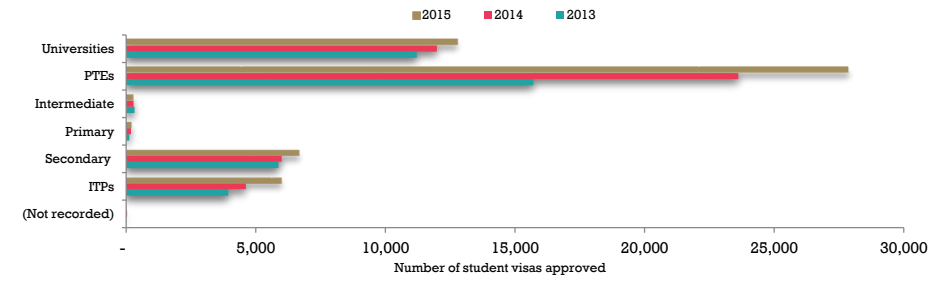
YTD top five market shifts (TSVs)



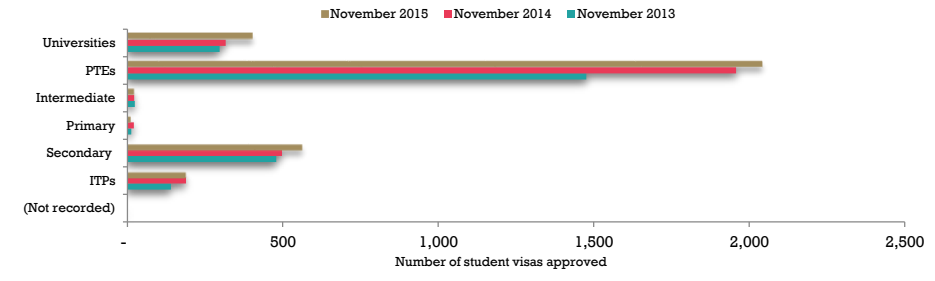
November top five market shifts (TSVs)



Auckland: Total student visas issued by sector, YTD



Auckland: Total student visas issued by sector, November



Top and bottom 3 regional shifts (FSVs)

Country	MONTH	
	Change (percentage)	Change (number)
USA	↑ 478%	43
Thailand	↑ 256%	41
China	↑ 8%	38
India	↓ -14%	-92
Philippines	↓ -41%	-45
Korea	↓ -21%	-35

Country	YTD	
	Change (percentage)	Change (number)
China	↑ 17%	819
Philippines	↑ 73%	680
India	↑ 8%	647
Nepal	↓ -54%	-175
Saudi Arabia	↓ -35%	-113
Fiji	↓ -25%	-55

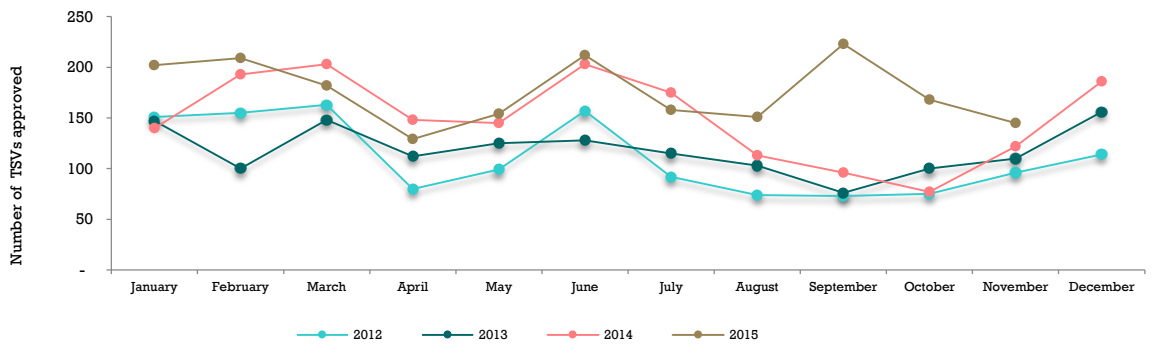
TOP FIVE MARKET SHIFTS (FSVs)

- Takeaways:**
- Auckland continues to experience strong growth. On a YTD basis, TSVs grew by 15% (7,027), and 13% (2,819) FSVs.
 - India has provided the largest growth in TSVs YTD, up 25% (2,897), China up 15% (2,543) and Philippines up 65% (696).
 - November results were positive with RSVs up 18% (200) while FSV were flat up % (25).

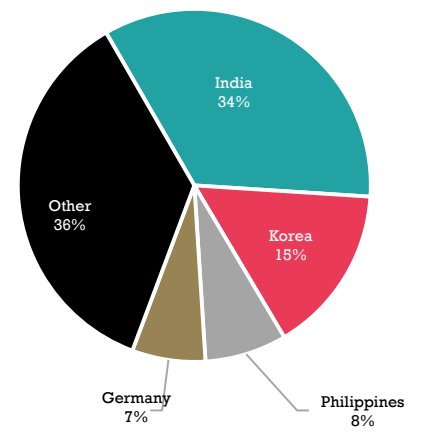
Bay of Plenty:

November RSV ↑ 14 41%	November FSV ↑ 9 10%	November TSV ↑ 23 19%	YTD RSV ↑ 233 37%	YTD FSV ↑ 85 9%	YTD TSV ↑ 318 20%
---------------------------------	--------------------------------	---------------------------------	-----------------------------	---------------------------	-----------------------------

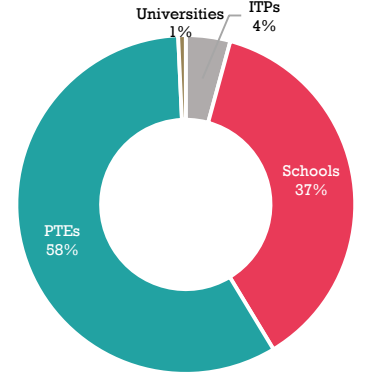
Bay of Plenty: Total student visas (TSVs) 2012 - 2015



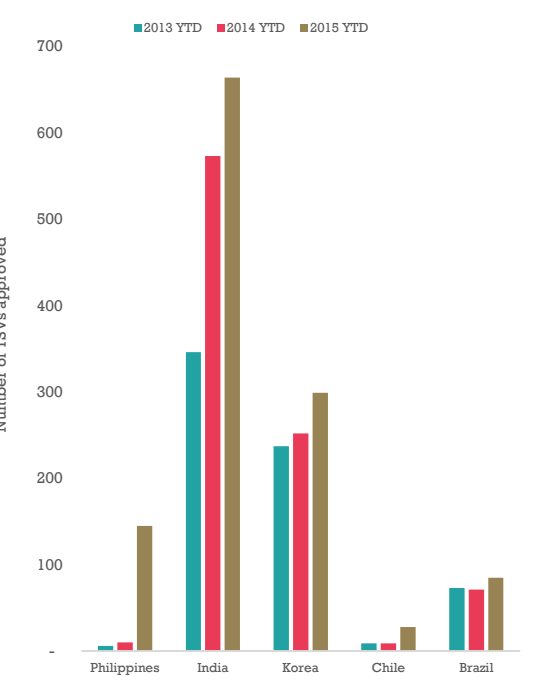
YTD 2015 country breakdown of TSVs



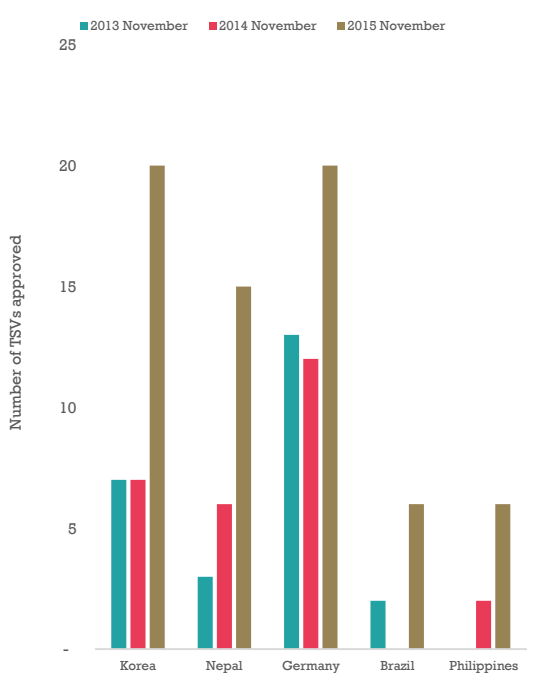
YTD 2015 sector breakdown of TSVs



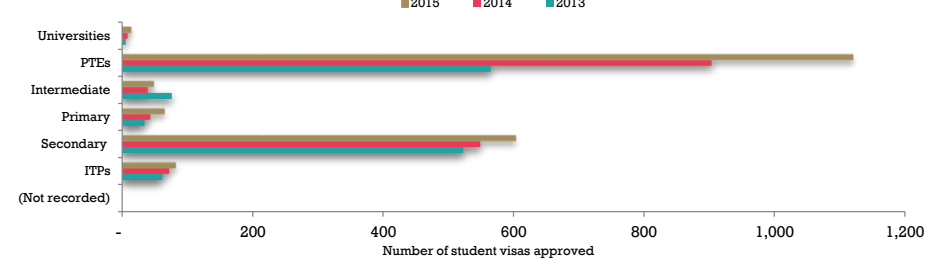
YTD top five market shifts (TSVs)



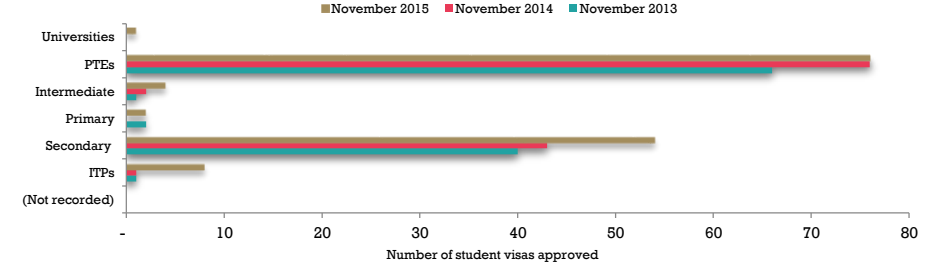
November top five market shifts (TSVs)



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



Bay of Plenty: Total student visas issued by sector, November



Top and bottom 3 regional shifts (FSVs)

Country	Change (percentage)	Change (number)
Germany	↑ 67%	8
Korea	↑ 120%	6
Brazil	NA	6
India	↓ -26%	-8
Japan	↓ -23%	-3
Austria	↓ -100%	-3

TOP FIVE MARKET SHIFTS (FSVs)

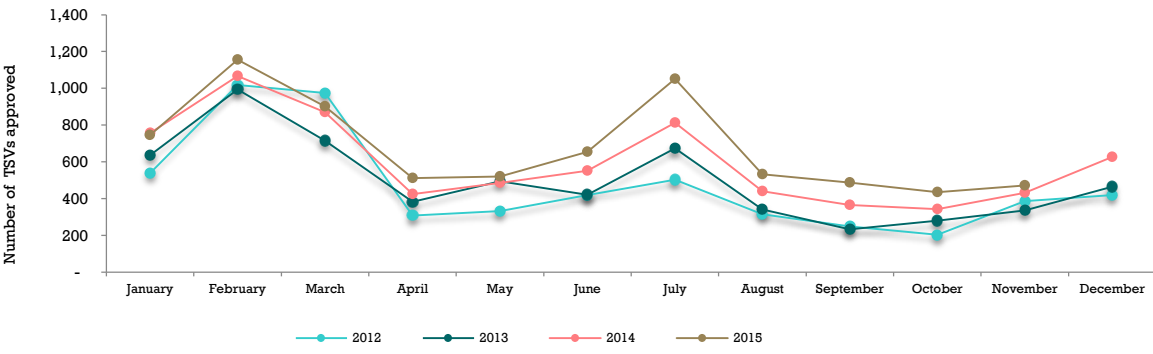
Country	Change (percentage)	Change (number)
Philippines	↑ 1914%	134
Chile	↑ 189%	17
Germany	↑ 14%	15
Nepal	↓ -51%	-37
India	↓ -10%	-32
Bangladesh	↓ -63%	-25

- Takeaways:**
- The Bay of Plenty (BOP) has provided strong TSV growth of 20% (318) YTD and RSVs YTD up 37% (233).
 - November results were positive with FSVs up 10% (9) and RSVs up 41% (14).
 - Nepal, Bangladesh and India have declined FSVs YTD.

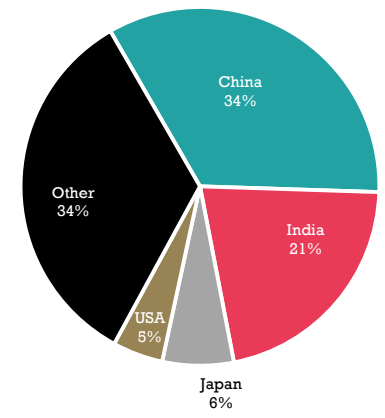
Canterbury:

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
↑ 24 15%	↑ 17 6%	↑ 41 10%	↑ 515 16%	↑ 406 12%	↑ 921 14%

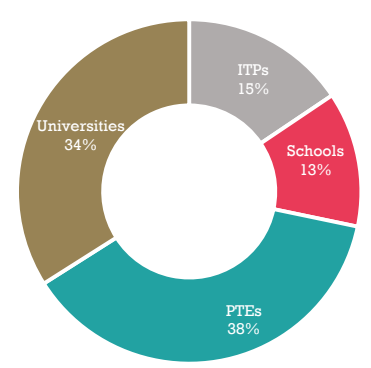
Canterbury: Total student visas (TSVs) 2012 - 2015



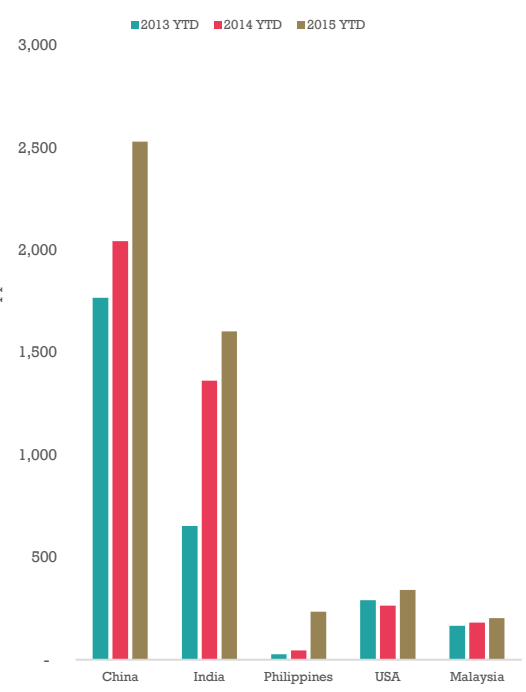
YTD 2015 country breakdown of TSVs



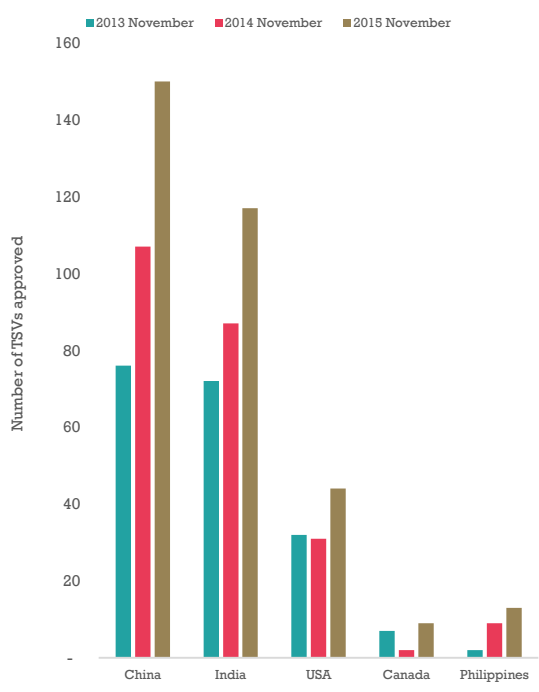
YTD 2015 sector breakdown of TSVs



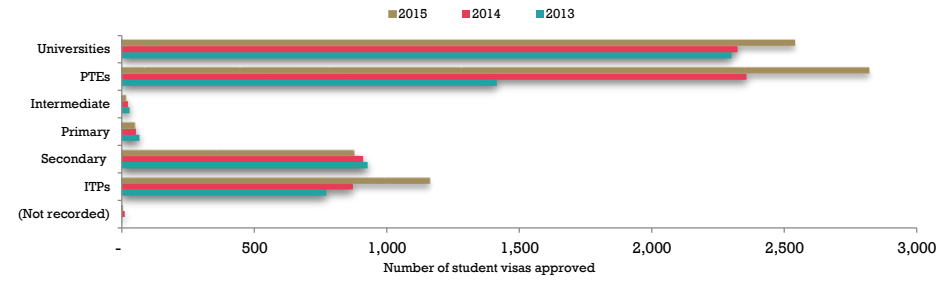
YTD top five market shifts (TSVs)



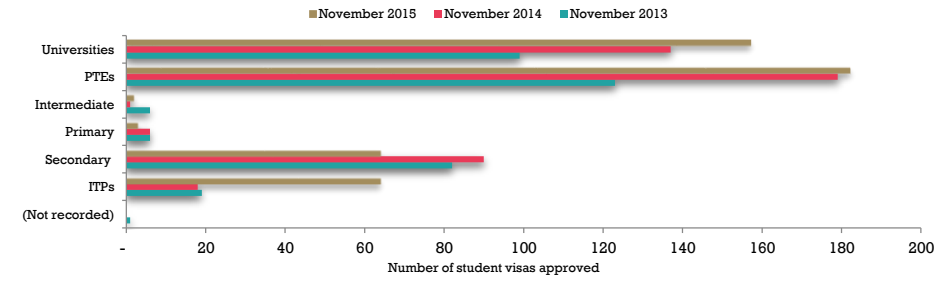
November top five market shifts (TSVs)



Canterbury: Total student visas issued by sector, YTD



Canterbury: Total student visas issued by sector, November



Top and bottom 3 regional shifts (FSVs)

Country	MONTH	
	Change (percentage)	Change (number)
China	↑ 72%	21
India	↑ 27%	17
USA	↑ 41%	12
Germany	↓ -61%	-14
Japan	↓ -35%	-12
Austria	↓ -100%	-5
YTD		
Country	Change (percentage)	Change (number)
Philippines	↑ 631%	183
China	↑ 28%	155
USA	↑ 32%	75
Thailand	↓ -28%	-33
Germany	↓ -22%	-31
Brazil	↓ -22%	-26

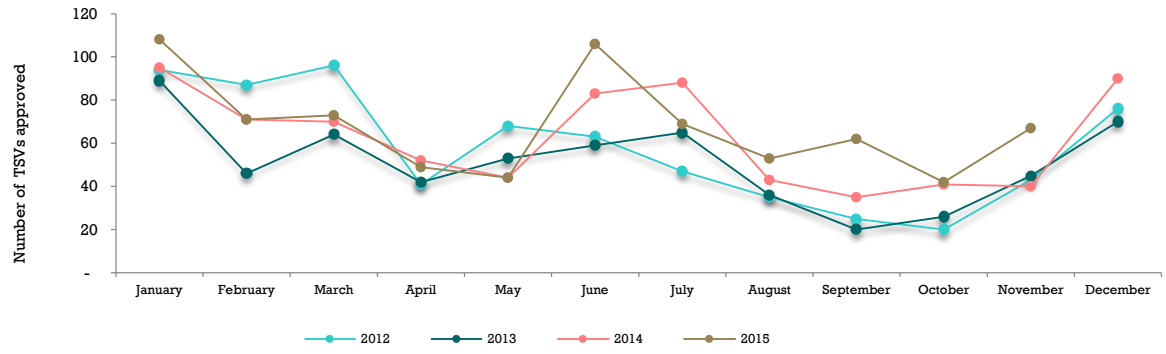
Takeaways:

- Canterbury continues to grow TSVs strongly; up 14% (921) YTD, and FSV up 12% (406) YTD.
- November saw strong results in TSV up 10% (41) and FSV up 6% (17).
- YTD the Philippines, China and the USA have experienced the largest growth in FSV in the region.

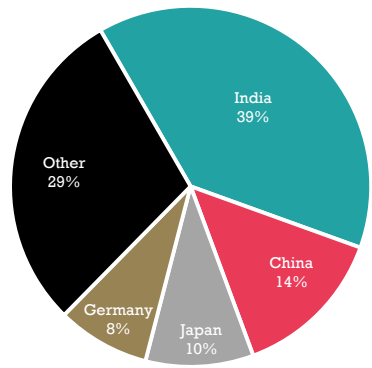
Hawke's Bay:

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV	
↑	10	59%	↑	17	74%	↑	27	68%	↑	46	17%
↑	36	9%	↑	82	12%	YTD (January to November)					

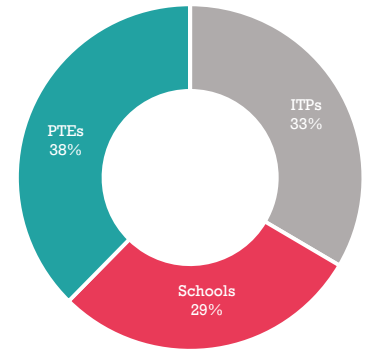
Hawke's Bay: Total student visas (TSVs) 2012 - 2015



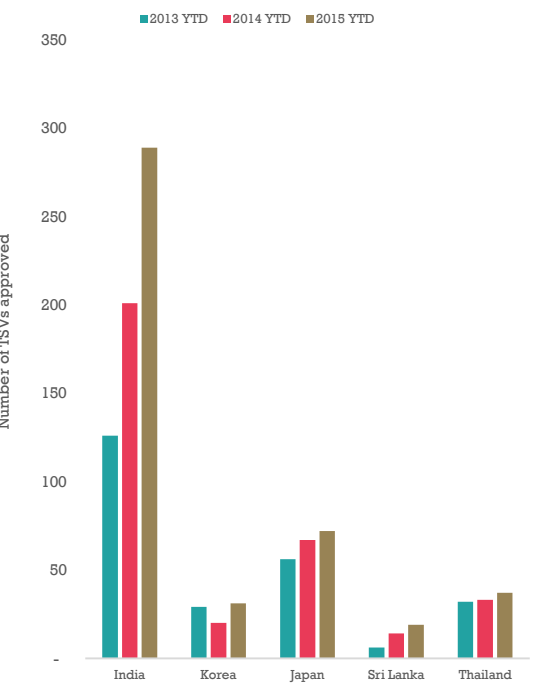
YTD 2015 country breakdown of TSVs



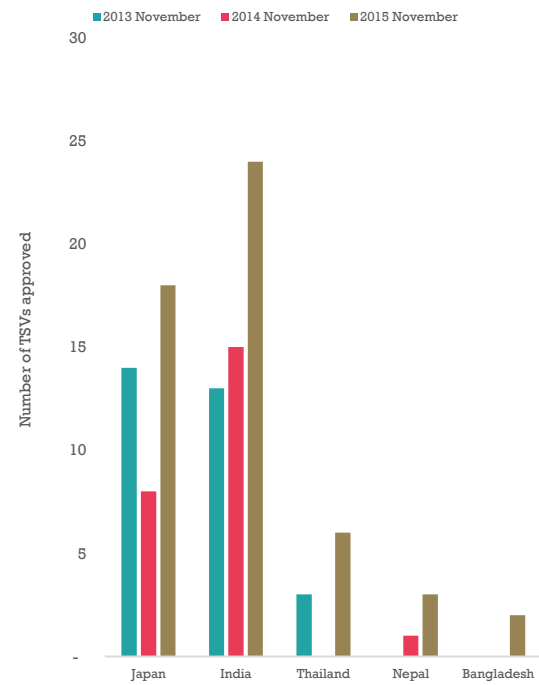
YTD 2015 sector breakdown of TSVs



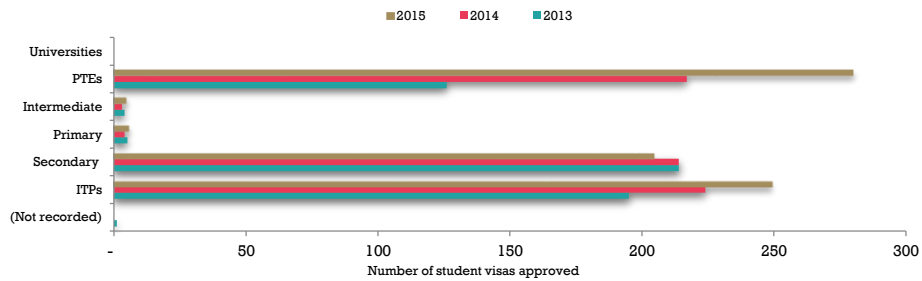
YTD top five market shifts (TSVs)



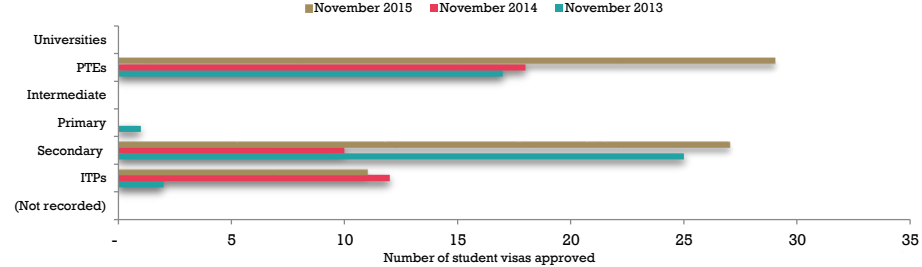
November top five market shifts (TSVs)



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



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



Top and bottom 3 regional shifts (FSVs)

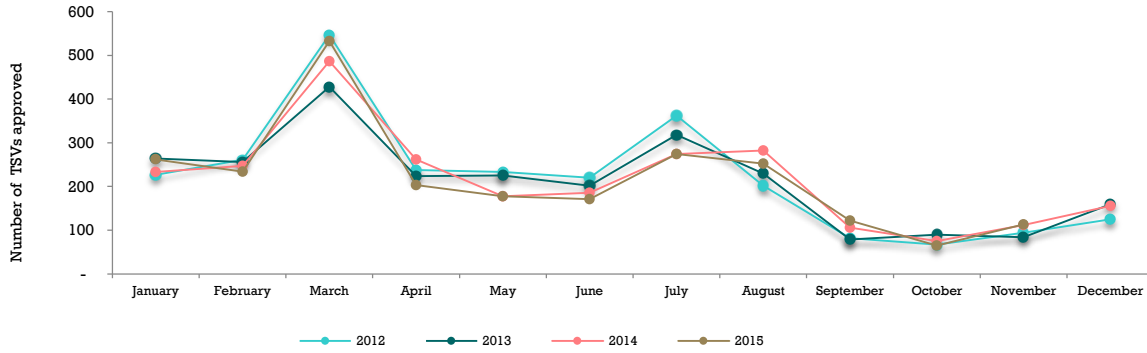
Country	MONTH	
	Change (percentage)	Change (number)
India	↑ 75%	6
Thailand	NA	6
Japan	↑ 83%	5
Germany	↓ -50%	-1
Austria	↓ -100%	-1
Denmark	↓ -100%	-1
YTD		
Country	Change (percentage)	Change (number)
India	↑ 32%	40
Korea	↑ 88%	7
Sri Lanka	↑ 86%	6
Germany	↓ -20%	-13
Brazil	↓ -59%	-13
France	↓ -56%	-5

TOP FIVE MARKET SHIFTS (FSVs)

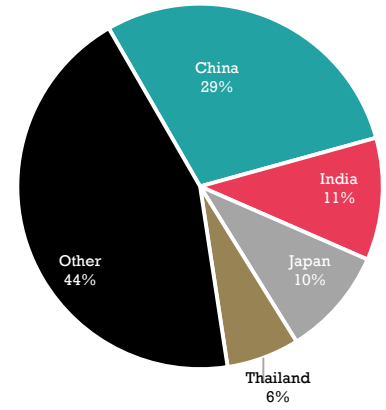
Takeaways:

- TSVs YTD experienced a 12% (82) increase and FSVs up 9% (36).
- November results were positive with TSVs up 68% (27) and FSVs up 74% (17).
- Hawke's Bay has also experienced some declining markets in FSVs YTD : France, Brazil and Germany.

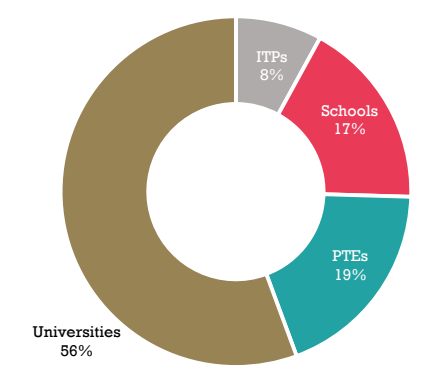
Manawatu: Total student visas (TSVs) 2012 - 2015



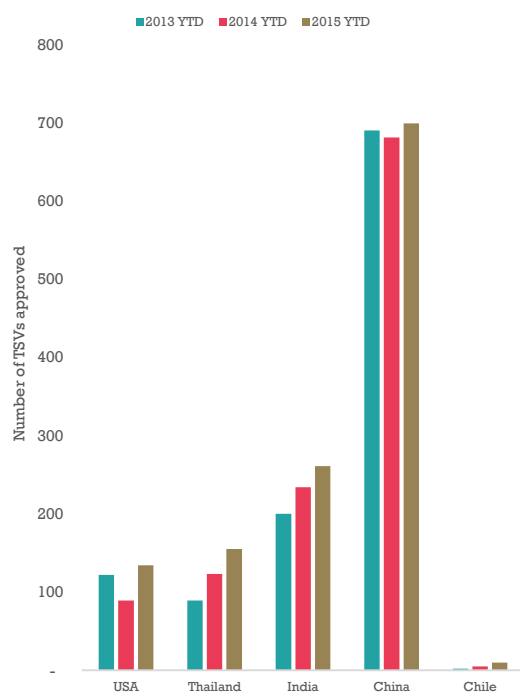
YTD 2015 country breakdown of TSVs



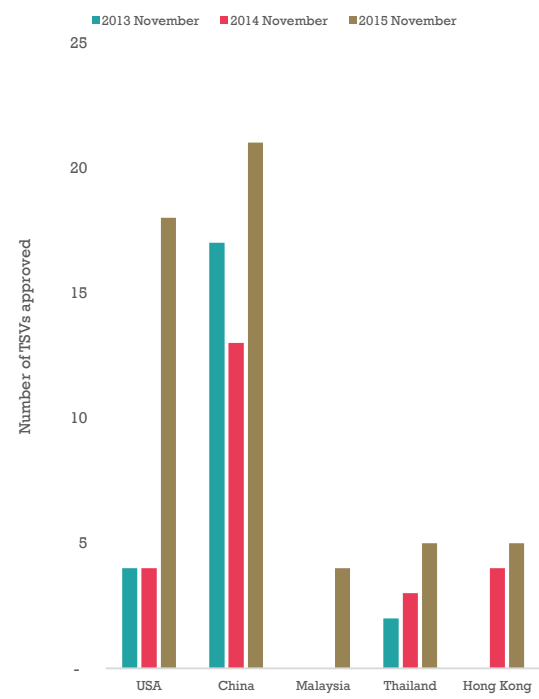
YTD 2015 sector breakdown of TSVs



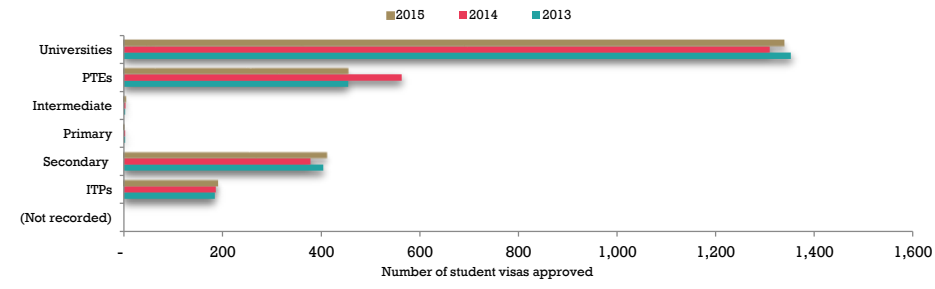
YTD top five market shifts (TSVs)



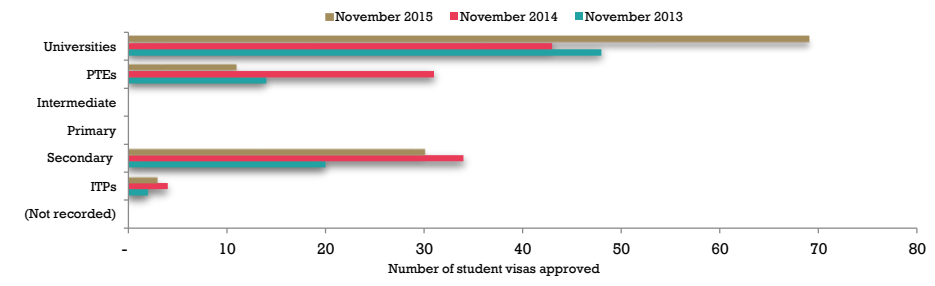
November top five market shifts (TSVs)



Manawatu: Total student visas issued by sector, YTD



Manawatu: Total student visas issued by sector, November



Top and bottom 3 regional shifts (FSVs)

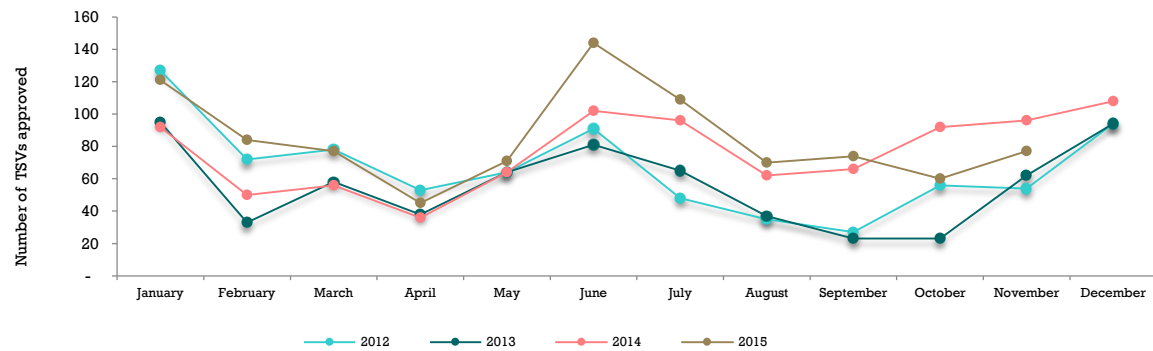
MONTH		
Country	Change (percentage)	Change (number)
USA	500%	15
Malaysia	NA	4
China	20%	2
Japan	-60%	-6
Saudi Arabia	-86%	-6
Pakistan	-100%	-4
YTD		
Country	Change (percentage)	Change (number)
USA	93%	50
Thailand	36%	21
India	14%	20
Japan	-25%	-31
Indonesia	-64%	-25
Saudi Arabia	-69%	-18

TOP FIVE MARKET SHIFTS (FSVs)

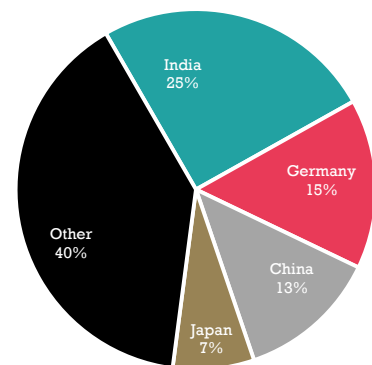
- Takeaways:
- The Manawatu region has been flat YTD with TSVs down 1% (-35), and FSV down 1% (-13).
 - YTD in TSVs growth in key markets has been spread between the USA, India and Thailand.

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV							
↓	-4	-33%	↓	-15	-18%	↓	-19	-20%	↑	78	38%	↑	42	7%	↑	120	15%

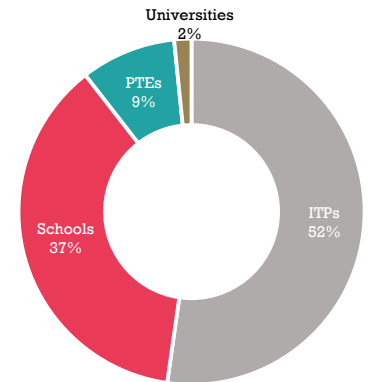
Nelson: Total student visas (TSVs) 2012 - 2015



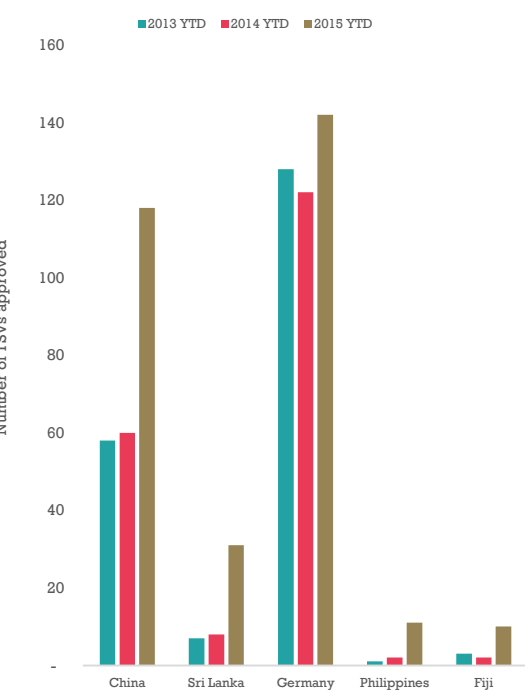
YTD 2015 country breakdown of TSVs



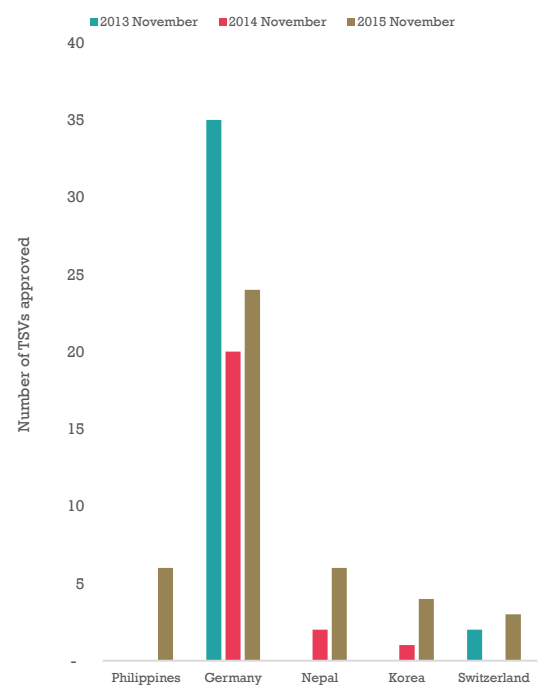
YTD 2015 sector breakdown of TSVs



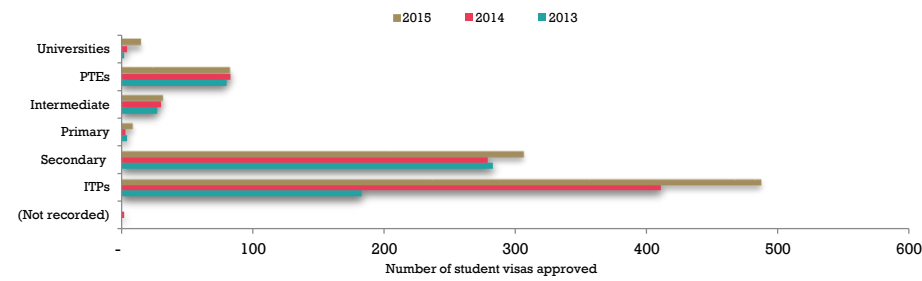
YTD top five market shifts (TSVs)



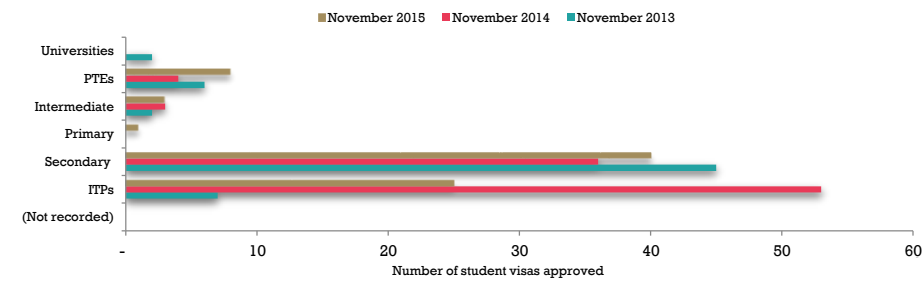
November top five market shifts (TSVs)



Nelson: Total student visas issued by sector, YTD



Nelson: Total student visas issued by sector, November



Top and bottom 3 regional shifts (FSVs)

Country	MONTH	
	Change (percentage)	Change (number)
Germany	↑ 22%	4
Philippines	NA	4
Nepal	↑ 150%	3
India	↓ -71%	-27
Japan	↓ -50%	-4
Saudi Arabia	↓ -100%	-4

Country	YTD	
	Change (percentage)	Change (number)
China	↑ 112%	37
Sri Lanka	↑ 867%	26
Germany	↑ 22%	23
India	↓ -16%	-34
Saudi Arabia	↓ -93%	-13
Brazil	↓ -43%	-10

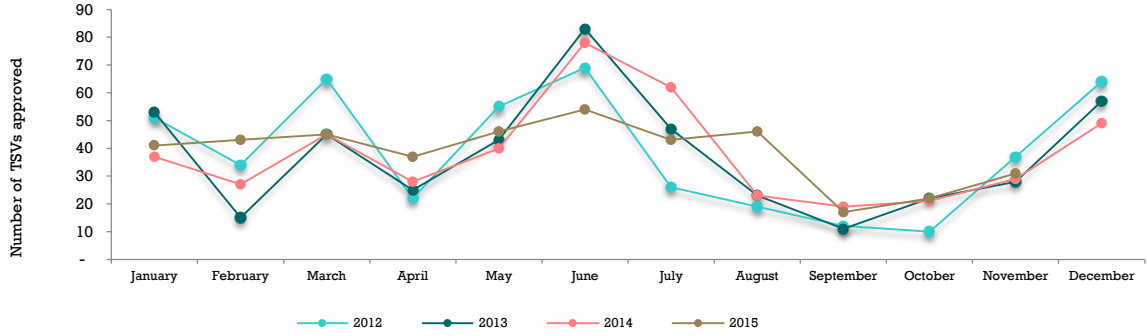
TOP FIVE MARKET SHIFTS (FSVs)

- Takeaways:**
- Nelson YTD TSVs are up 15% (120), driven by gains in both RSVs and FSVs. Nelson experienced a decline in November, down 20% (-19) in TSVs.
 - YTD TSV growth in key markets has been from China up 97% (58) and Sri Lanka 288% (23). FSV YTD declines have come from Brazil, Saudi Arabia and India.

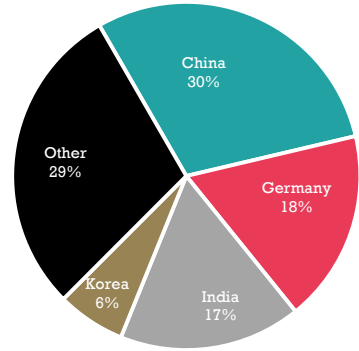
Northland:

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV							
	5	500%		-3	-11%		2	7%		67	68%		-51	-16%		16	4%

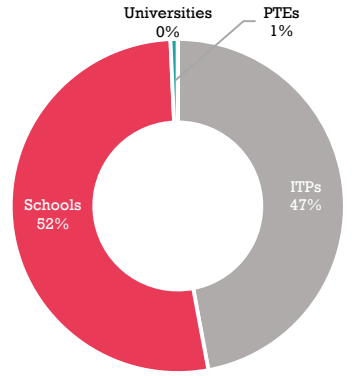
Northland: Total student visas (TSVs) 2012 - 2015



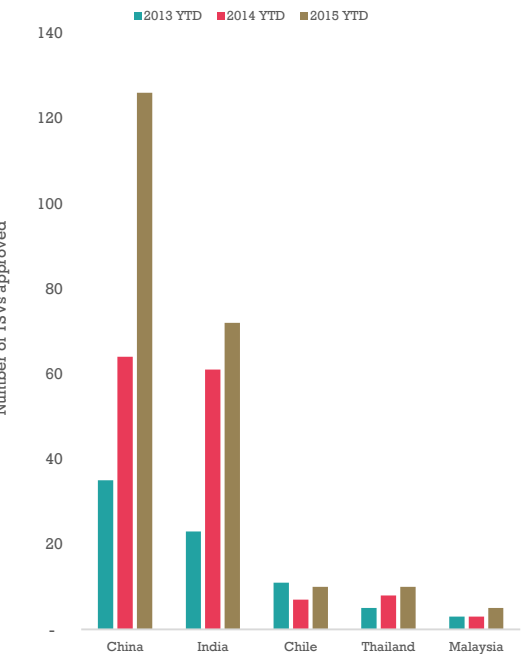
YTD 2015 country breakdown of TSVs



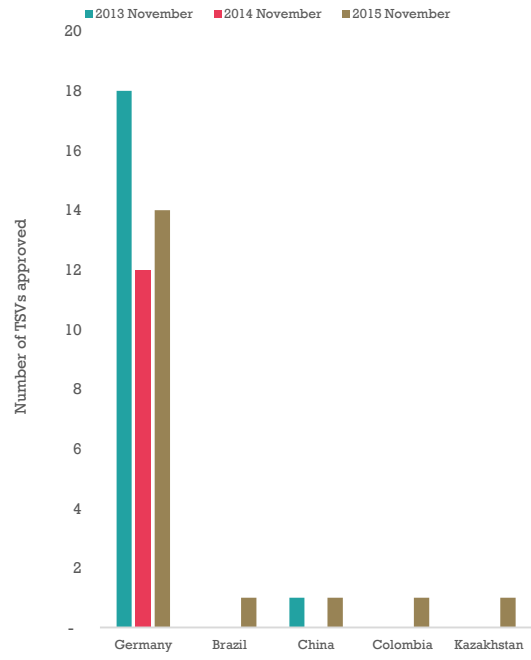
YTD 2015 sector breakdown of TSVs



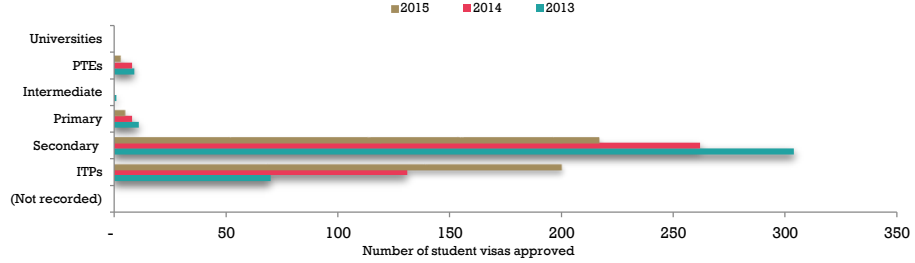
YTD top five market shifts (TSVs)



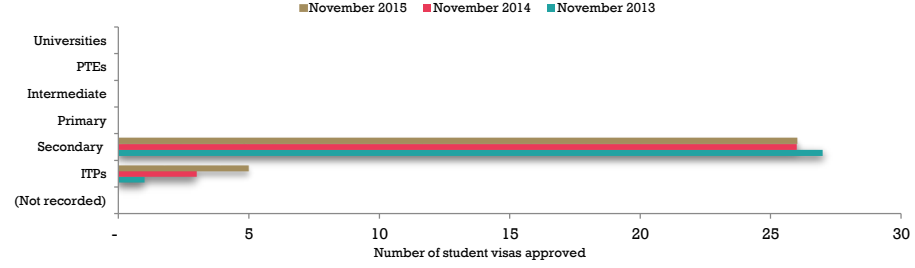
November top five market shifts (TSVs)












Northland: Total student visas issued by sector, YTD



Northland: Total student visas issued by sector, November



Top and bottom 3 regional shifts (FSVs)

MONTH		
Country	Change (percentage)	Change (number)
Brazil	NA	1
China	NA	1
Colombia	NA	1
Japan	 -30%	-3
Austria	 -100%	-3
India	 -33%	-1
YTD		
Country	Change (percentage)	Change (number)
China	 26%	11
Korea	 100%	6
Chile	 100%	4
Brazil	 -61%	-20
Germany	 -19%	-16
India	 -27%	-14

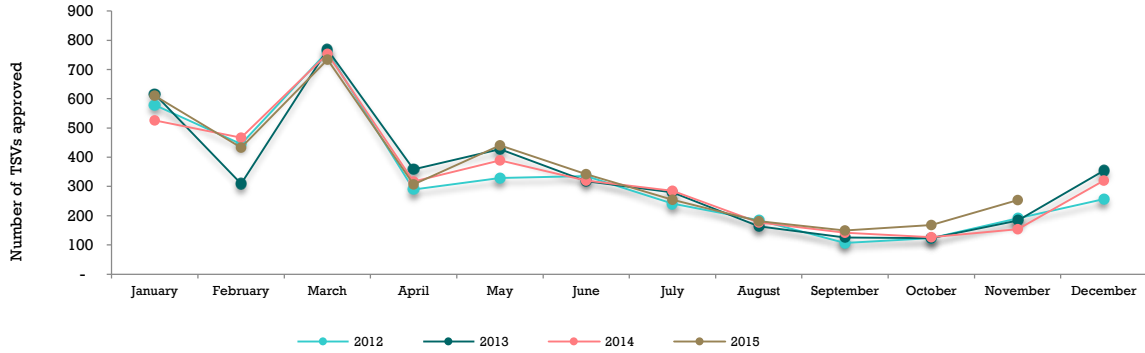
TOP FIVE MARKET SHIFTS (FSVs)

- Takeaways:
- Northland has been flat in TSVs YTD, up 4% (16). While RSVs YTD are a positive result up 68% (67), FSVs are down 16% (-51) YTD.
 - YTD TSV growth has come from China up 97% (62). Major declines in YTD FSVs came from Brazil, Germany, and India.

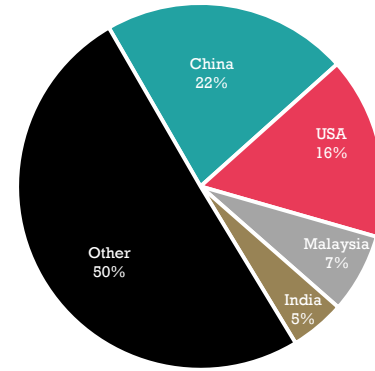
November RSV	November FSV	November TSV
↑ 33 87%	↑ 66 57%	↑ 99 64%

YTD RSV	YTD FSV	YTD TSV
→ -31 -2%	↑ 246 15%	↑ 215 6%

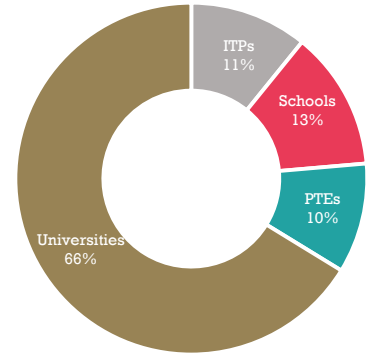
Otago: Total student visas (TSVs) 2012 - 2015



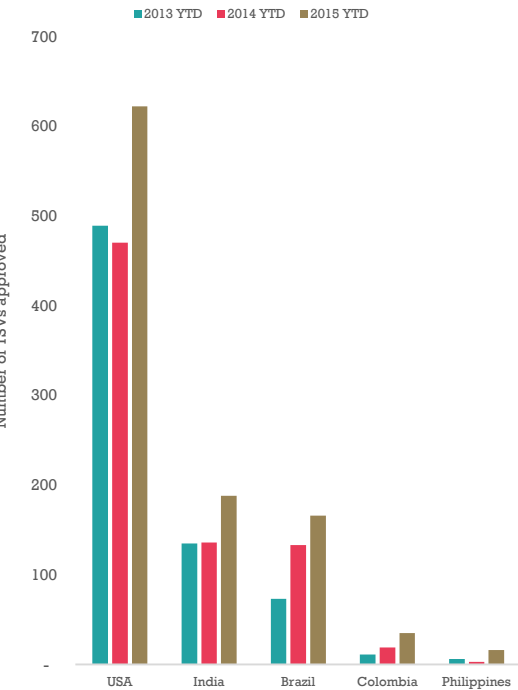
YTD 2015 country breakdown of TSVs



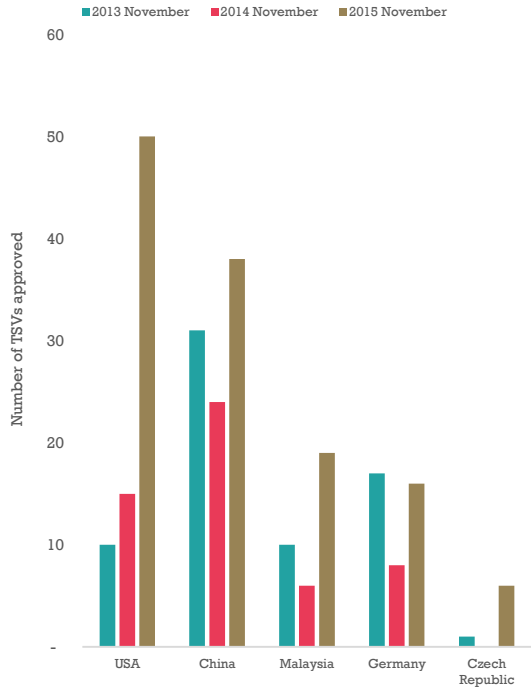
YTD 2015 sector breakdown of TSVs



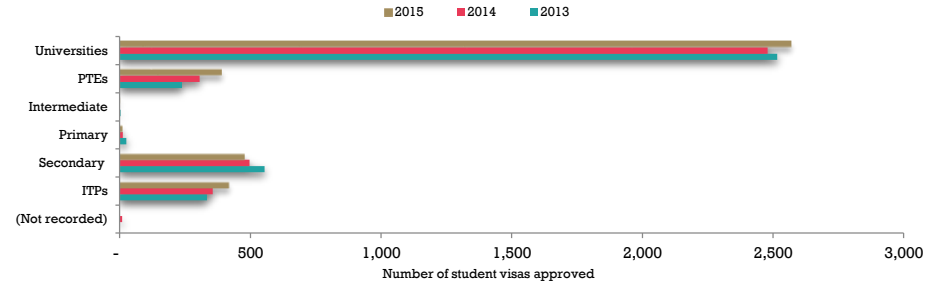
YTD top five market shifts (TSVs)



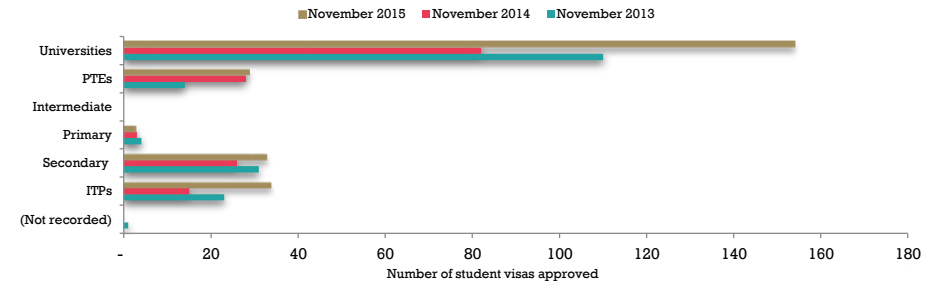
November top five market shifts (TSVs)



Otago: Total student visas issued by sector, YTD



Otago: Total student visas issued by sector, November



Top and bottom 3 regional shifts (FSVs)

Country	MONTH	
	Change (percentage)	Change (number)
USA	↑ 277%	36
Malaysia	↑ 240%	12
Czech Republic	NA	6
Brazil	↓ -50%	-3
Saudi Arabia	↓ -75%	-3
Sweden	↓ -67%	-2

TOP FIVE MARKET SHIFTS (FSVs)

Country	YTD	
	Change (percentage)	Change (number)
USA	↑ 34%	145
Malaysia	↑ 84%	38
India	↑ 57%	37
Thailand	↓ -36%	-37
Germany	↓ -18%	-25
Saudi Arabia	↓ -50%	-15

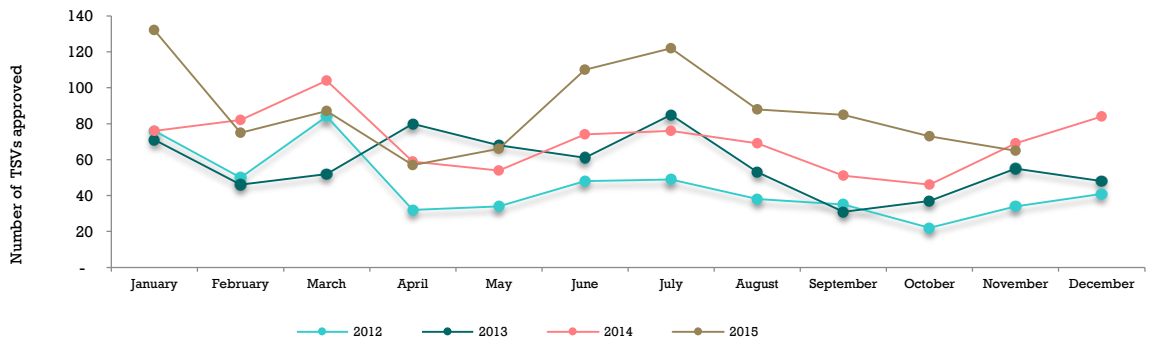
Takeaways:

- YTD TSVs increased by 6% (215) and FSV by 15% (246).
- November results were positive with TSV up 64% (99) and FSVs up 57% (66).
- The USA FSVs YTD are up 34% (145), and Malaysia is up 84% (38) while Thailand is down 36% (-37) and Germany is down 18% (-25).

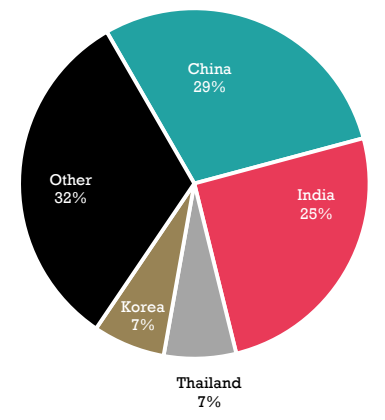


November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
➔ 0 0%	⬇ -4 -9%	⬇ -4 -6%	⬆ 19 5%	⬆ 181 46%	⬆ 200 26%

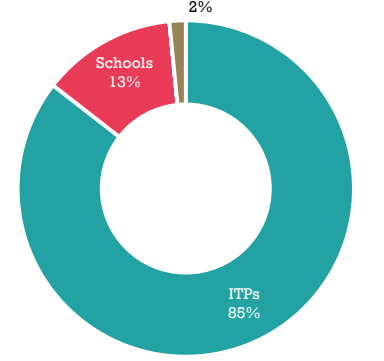
Southland: Total student visas (TSVs) 2012 - 2015



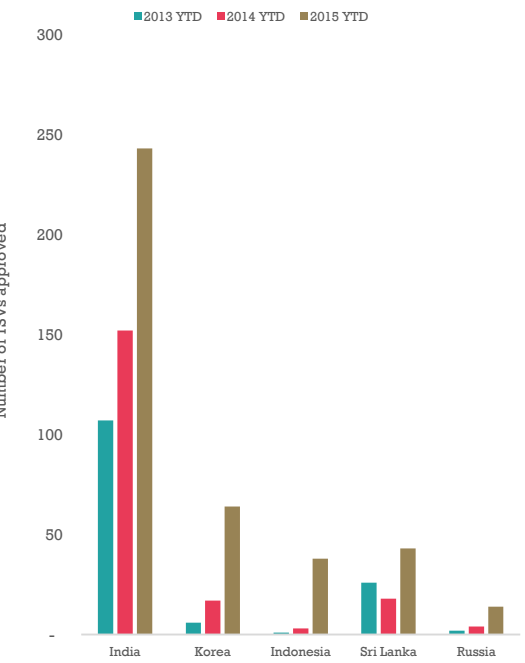
YTD 2015 country breakdown of TSVs



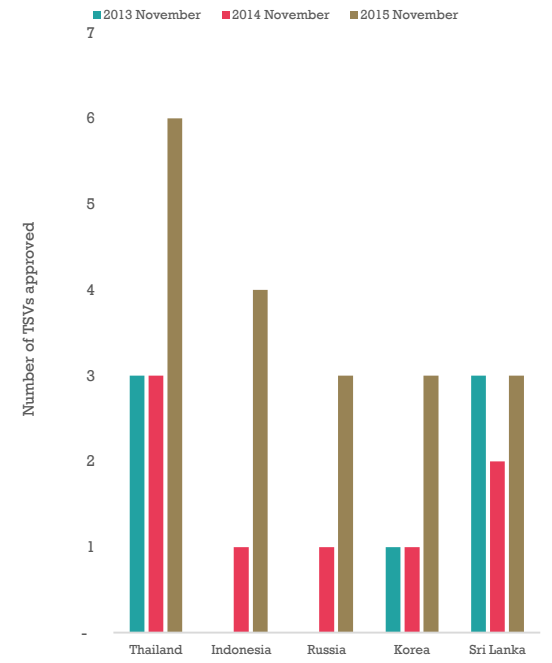
YTD 2015 sector breakdown of TSVs



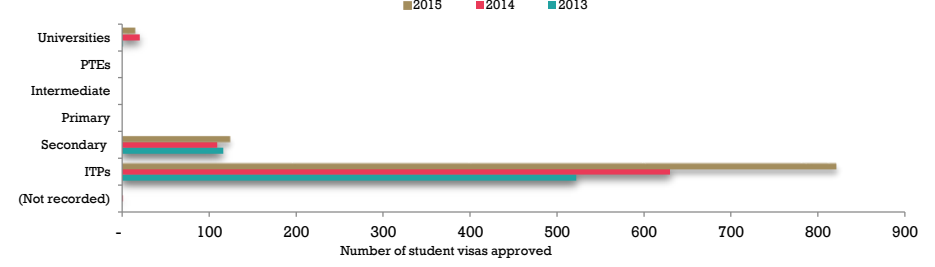
YTD top five market shifts (TSVs)



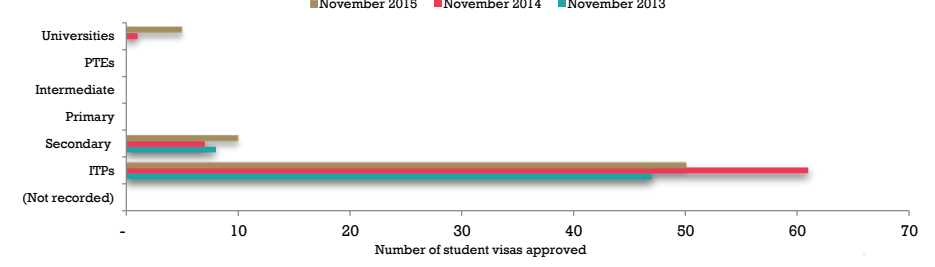
November top five market shifts (TSVs)



Southland: Total student visas issued by sector, YTD



Southland: Total student visas issued by sector, November



Top and bottom 3 regional shifts (FSVs)

Country	MONTH	
	Change (percentage)	Change (number)
Thailand	⬆ 200%	4
Indonesia	⬆ 200%	2
Russia	NA	2
India	⬇ -64%	-9
China	⬇ -36%	-4
Germany	⬇ -80%	-4
YTD		
Country	Change (percentage)	Change (number)
India	⬆ 86%	86
Indonesia	⬆ 1650%	33
Korea	⬆ 273%	30
China	⬇ -17%	-17
Germany	⬇ -27%	-9
Thailand	⬇ -17%	-6

TOP FIVE MARKET SHIFTS (FSVs)

Takeaways:

- Southland has shown strong growth YTD in TSVs, up 26% (200), and FSVs YTD up 46% (181).
- YTD TSVs have been from China (29%), India (25%) and Thailand (7%).

November RSV
 ↓ -13 -81%

November FSV
 ↓ -3 -27%

November TSV
 ↓ -16 -59%

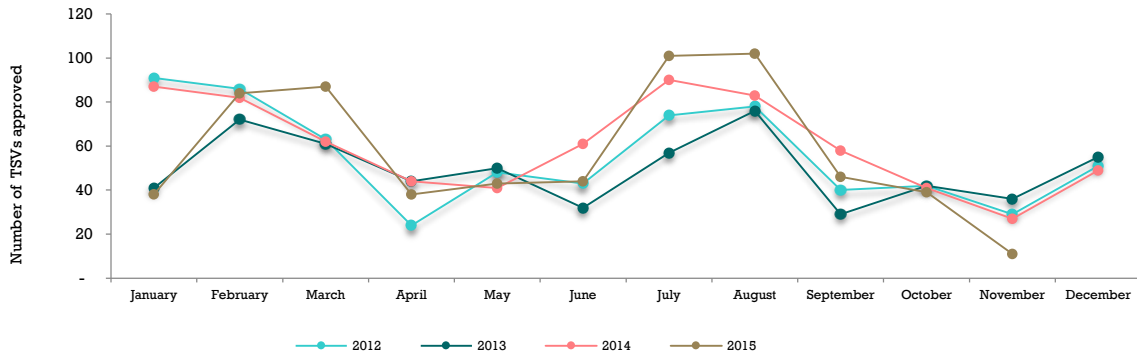
YTD RSV
 ↑ 46 12%

YTD FSV
 ↓ -89 -29%

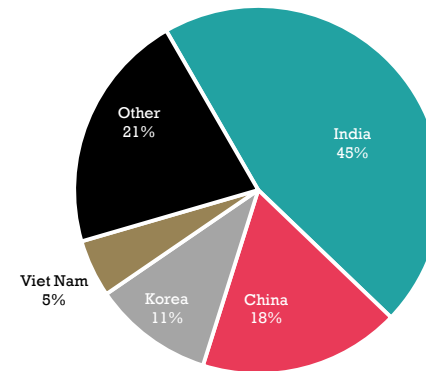
YTD TSV
 ↓ -43 -6%

YTD (January to November)

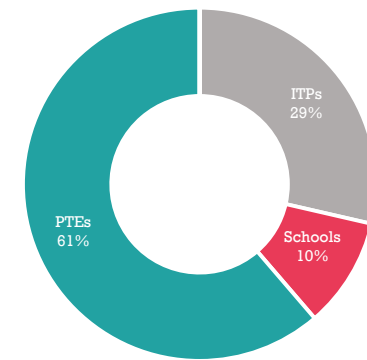
Taranaki: Total student visas (TSVs) 2012 - 2015



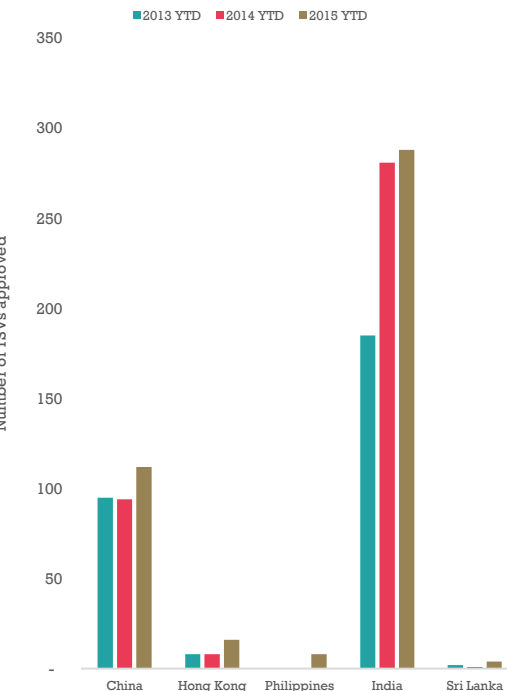
YTD 2015 country breakdown of TSVs



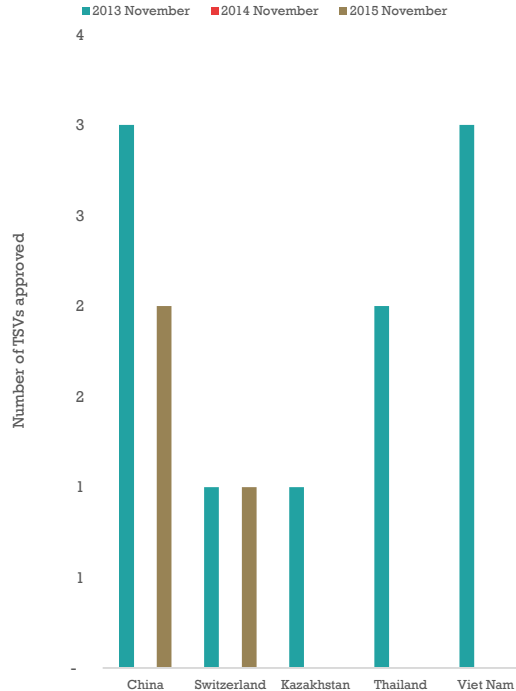
YTD 2015 sector breakdown of TSVs



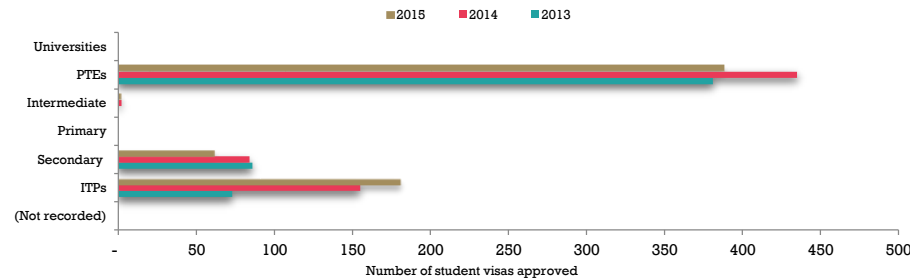
YTD top five market shifts (TSVs)



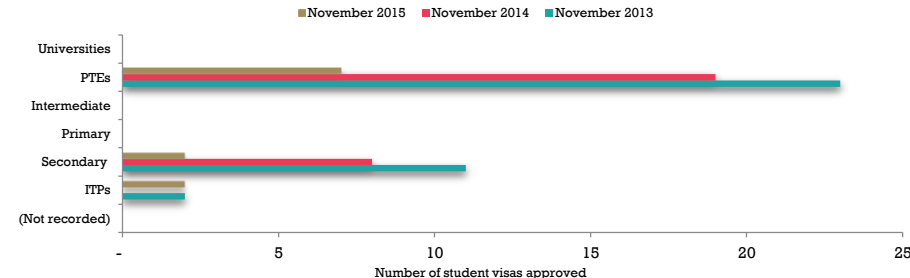
November top five market shifts (TSVs)



Taranaki: Total student visas issued by sector, YTD



Taranaki: Total student visas issued by sector, November



Top and bottom 3 regional shifts (FSVs)

Country	MONTH	
	Change (percentage)	Change (number)
China	NA	2
India	↑ 33%	1
Switzerland	NA	1
Japan	↓ -83%	-5
Germany	↓ -100%	-2
Thailand	NA	0
YTD		
Country	Change (percentage)	Change (number)
Philippines	NA	5
Germany	↑ 43%	3
Hong Kong	NA	3
Korea	↓ -91%	-40
India	↓ -20%	-32
Viet Nam	↓ -78%	-7

TOP FIVE MARKET SHIFTS (FSVs)

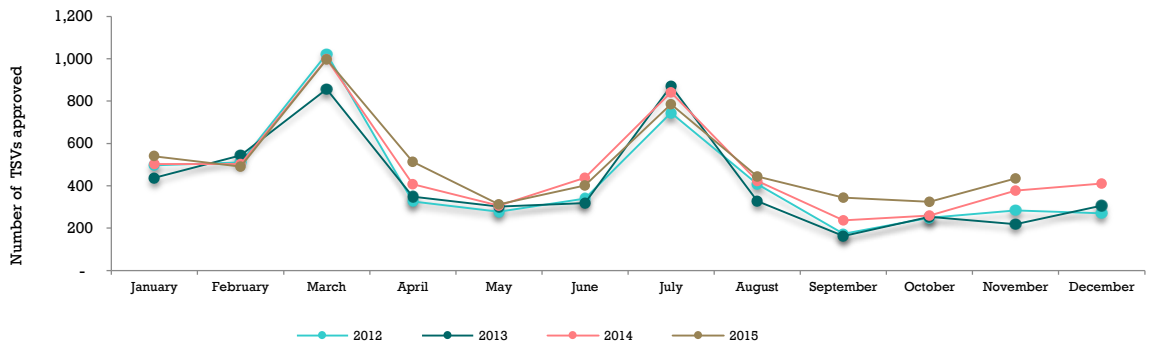
Takeaways:

- YTD TSVs are down 6% (-43) and FSVs are down 29% (-89) in the region.
- Korea and India have provided the largest declines in FSVs YTD.

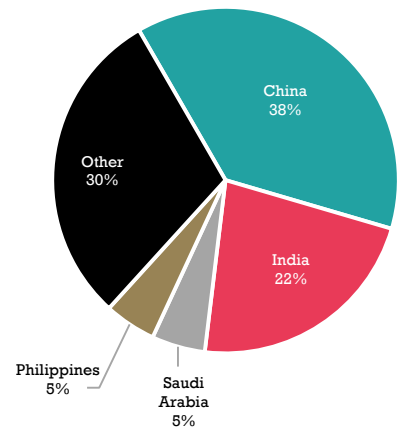
November RSV	November FSV	November TSV
↑ 30 41%	↑ 27 9%	↑ 57 15%

YTD RSV	YTD FSV	YTD TSV
→ 57 2%	↑ 238 9%	↑ 295 6%

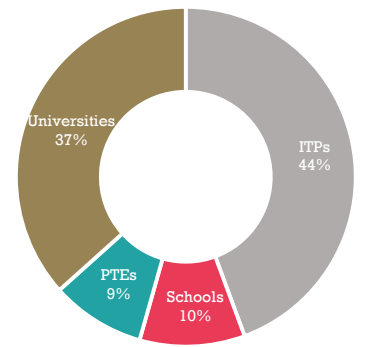
Waikato: Total student visas (TSVs) 2012 - 2015



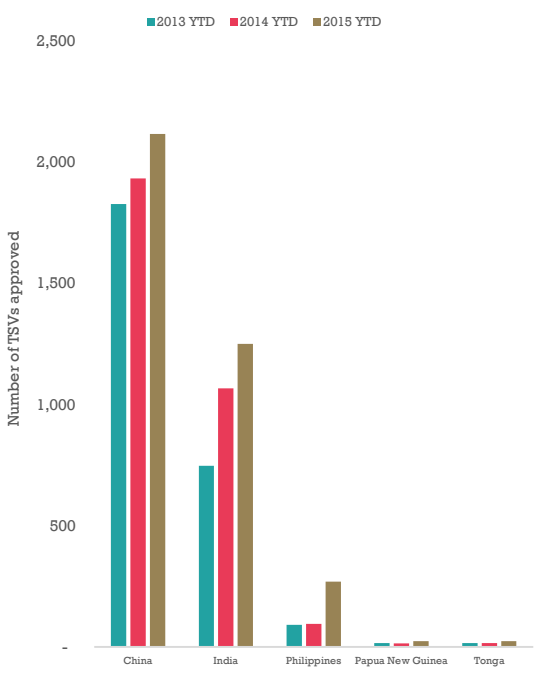
YTD 2015 country breakdown of TSVs



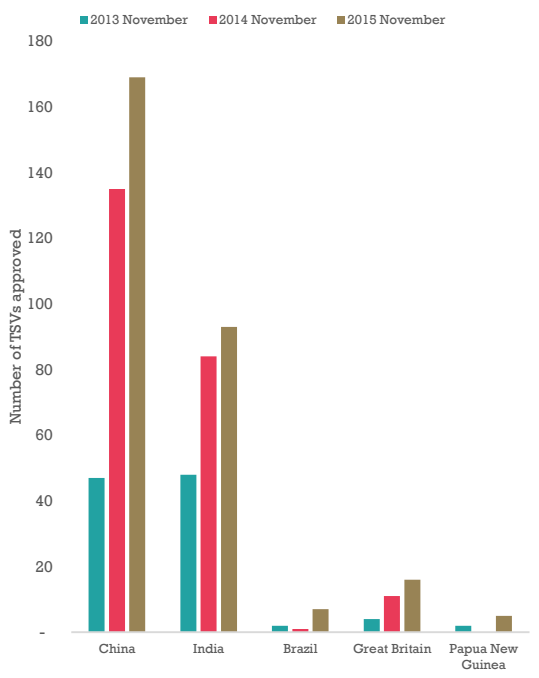
YTD 2015 sector breakdown of TSVs



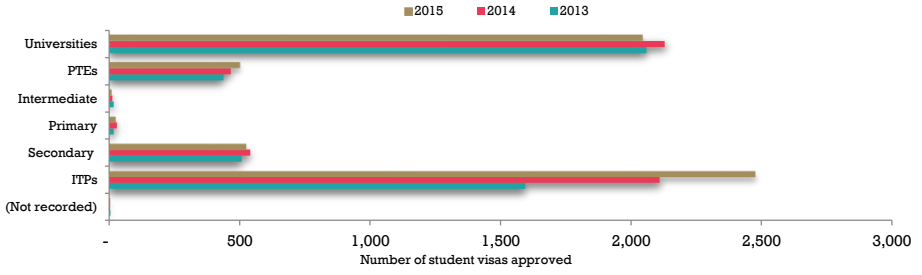
YTD top five market shifts (TSVs)



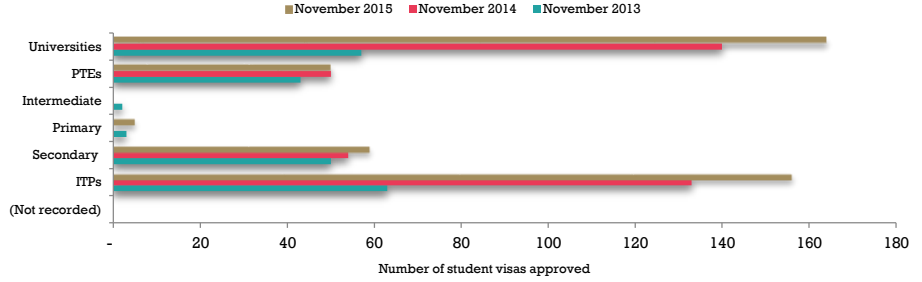
November top five market shifts (TSVs)



Waikato: Total student visas issued by sector, YTD



Waikato: Total student visas issued by sector, November



Top and bottom 3 regional shifts (FSVs)

Country	MONTH	
	Change (percentage)	Change (number)
China	↑ 15%	14
India	↑ 11%	9
Brazil	↑ 600%	6
Japan	↓ -35%	-13
Germany	↓ -45%	-5
Saudi Arabia	↓ -50%	-4
YTD		

TOP FIVE MARKET SHIFTS (FSVs)

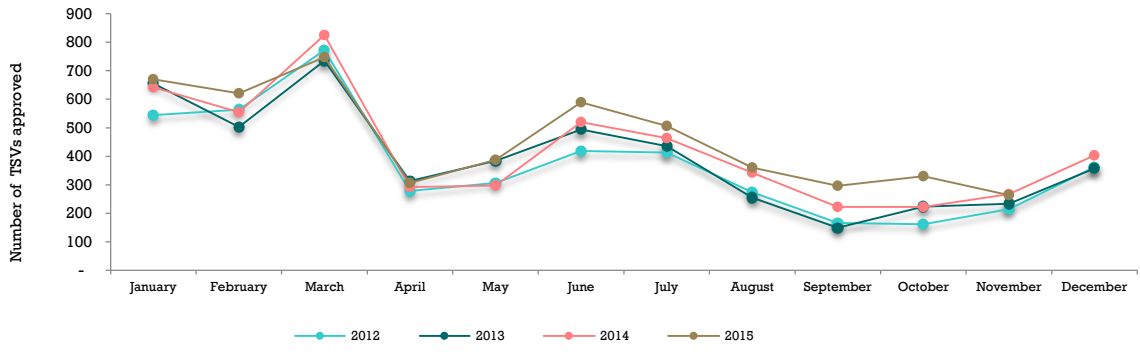
Country	YTD	
	Change (percentage)	Change (number)
Philippines	↑ 236%	175
India	↑ 22%	150
China	↑ 16%	91
Saudi Arabia	↓ -62%	-62
Japan	↓ -34%	-56
Nepal	↓ -51%	-32

Takeaways:

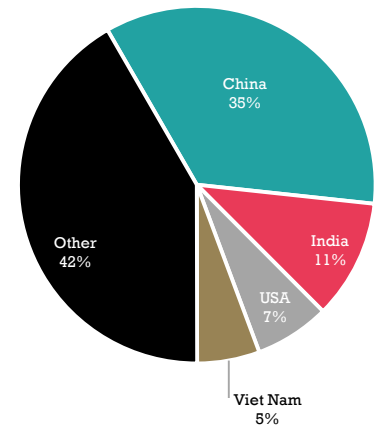
- Waikato's TSVs are up 6% (295) YTD. November was strong, with a TSV gain of 15% (57), with RSV up 41% (30).
- YTD the Philippines has had strong growth, up 236% (175) in FSVs. Major FSV decreases YTD came from Saudi Arabia, Japan, and Nepal.

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV							
	10	14%		-13	-7%		-3	-1%		91	4%		338	15%		429	9%

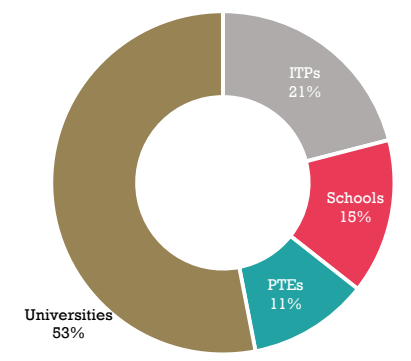
Wellington: Total student visas (TSVs) 2012 - 2015



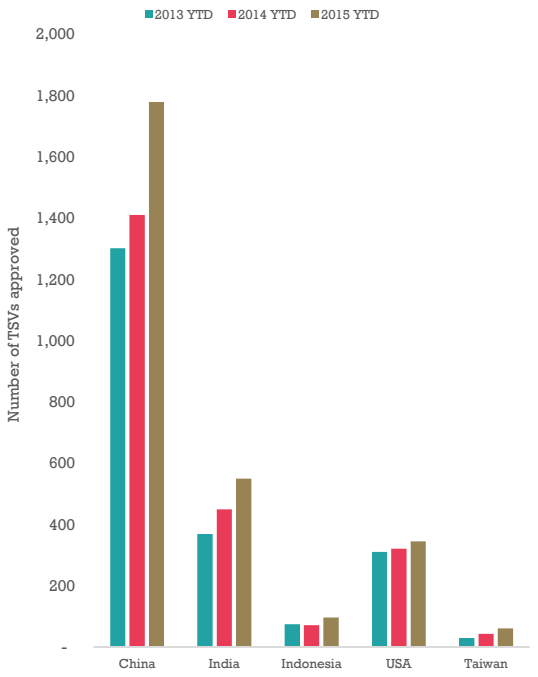
YTD 2015 country breakdown of TSVs



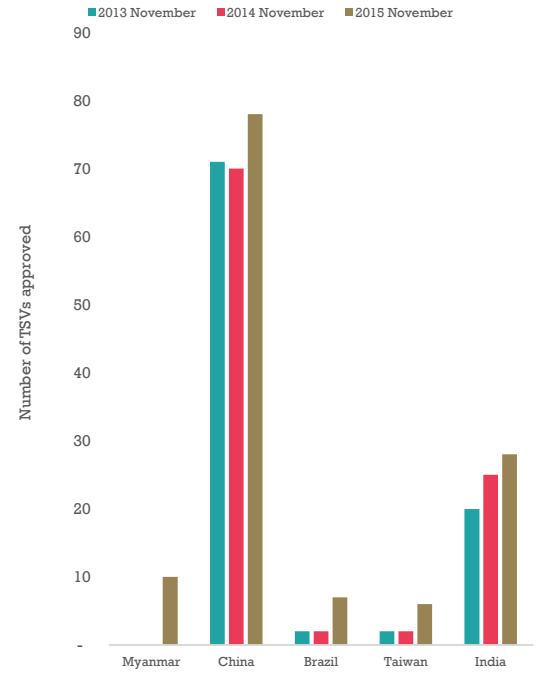
YTD 2015 sector breakdown of TSVs



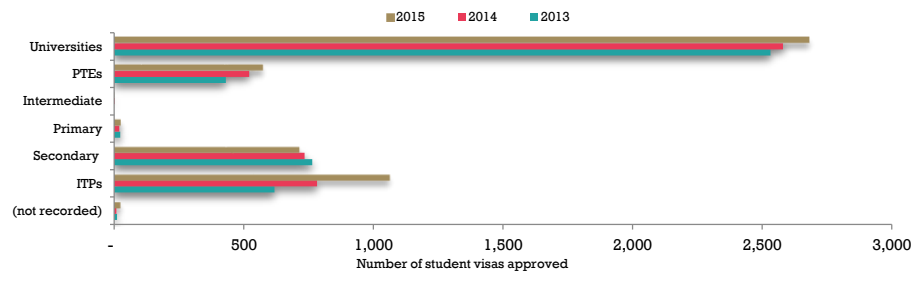
YTD top five market shifts (TSVs)



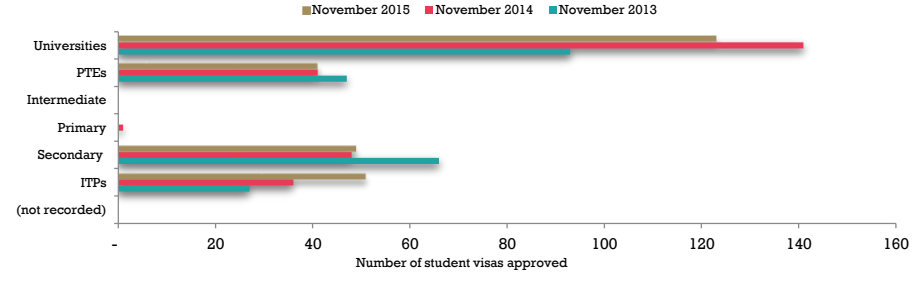
November top five market shifts (TSVs)














Wellington: Total student visas issued by sector, YTD



Wellington: Total student visas issued by sector, November



TOP FIVE MARKET SHIFTS (FSVs)

Country	MONTH		
	Change (percentage)	Change (number)	
Myanmar	NA	10	
Brazil		600%	6
Taiwan		500%	5
Viet Nam		-89%	-39
USA		-32%	-6
Germany		-29%	-4
YTD			
Country	Change (percentage)	Change (number)	
China		31%	132
India		28%	79
Malaysia		173%	45
Brazil		-30%	-39
Germany		-25%	-36
Viet Nam		-21%	-27

- Takeaways:
- Wellington has shown steady growth in TSVs YTD, up 9% (429). November results were mixed with FSVs down 7% (-13) and RSVs up 14% (10).
 - YTD major FSV increases have come from China 31% (132), India, 28% (79) and Malaysia, 173% (45).

Overall: Sector overview



Universities:



November RSV
 November FSV
 November TSV

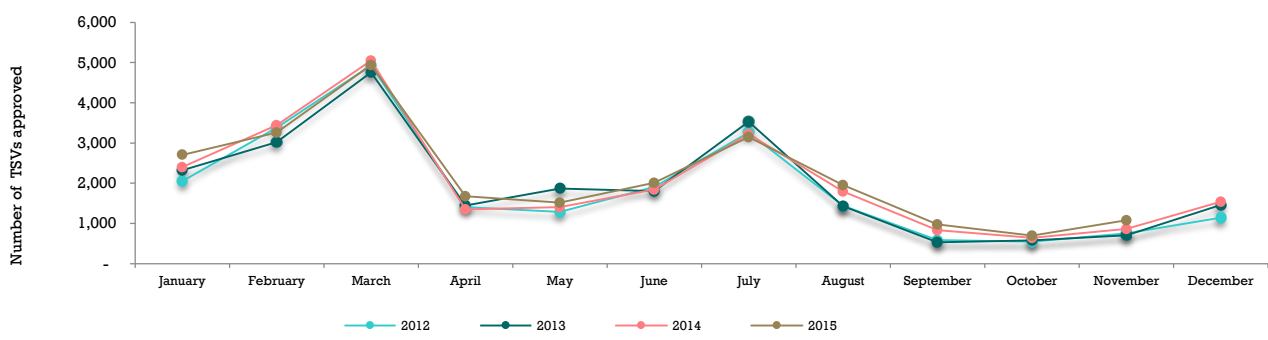
↑ **110** **42%**
 ↑ **106** **18%**
 ↑ **216** **25%**

YTD RSV
 YTD FSV
 YTD TSV

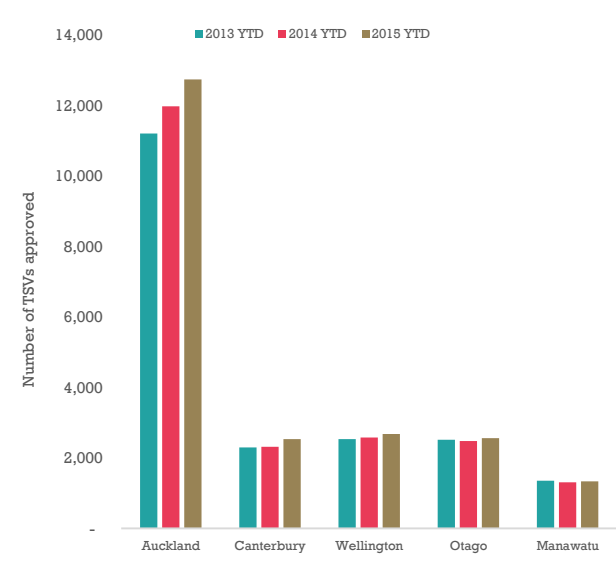
➡ **469** **3%**
 ↑ **649** **8%**
 ↑ **1,118** **5%**

YTD (January to November)

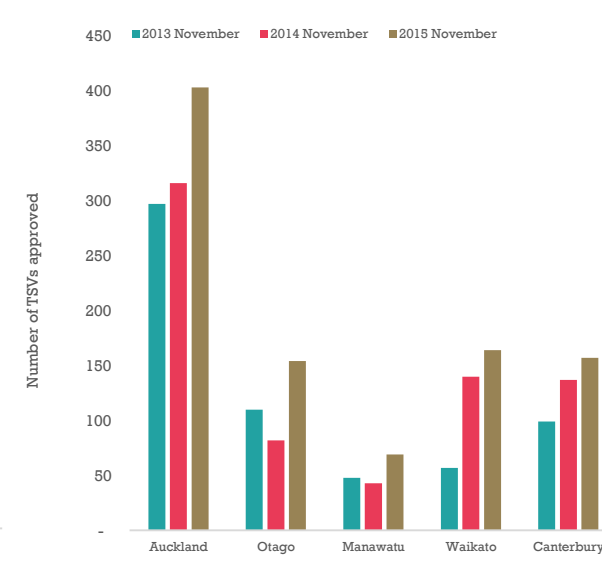
Universities: Total student visas (TSVs) 2012 - 2015



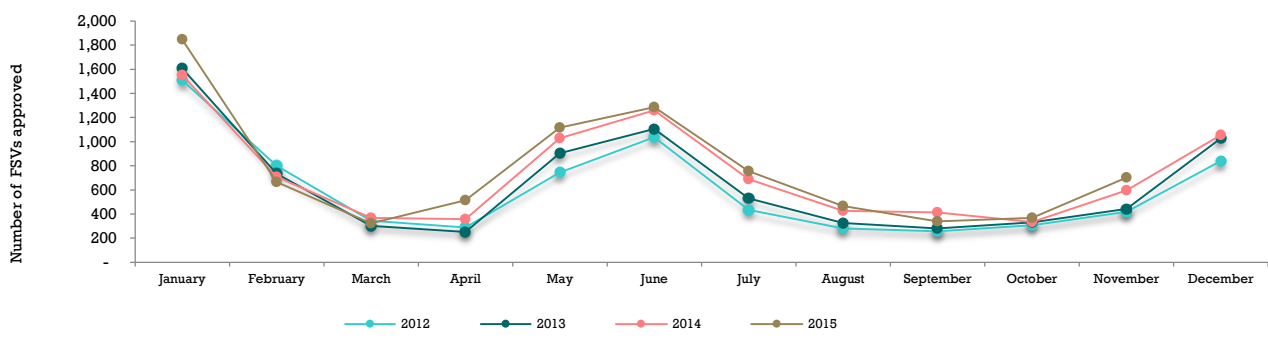
YTD top five regional changes (TSVs)



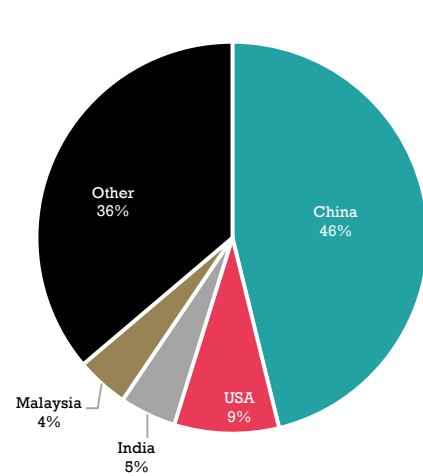
November top five regional changes (TSVs)



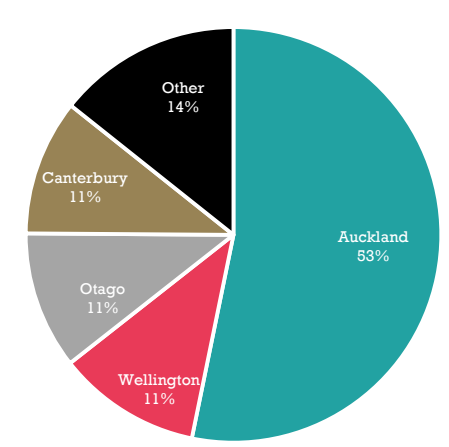
Universities: First time student visas (FSVs) 2012 - 2015



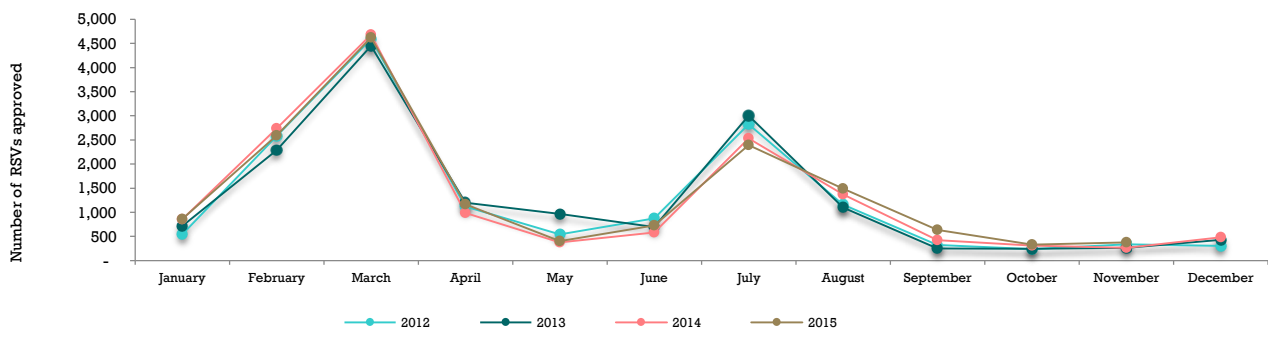
YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



Universities: Returning student visas (RSVs) 2012 - 2015



Takeaways:

- Universities have seen modest growth in 2015, TSV YTD up 5% (1,118) and FSV YTD up 8% (649).
- Growth YTD in TSVs has been driven by Auckland (up 6%), Canterbury (up 9%) and Wellington (up 4%).
- November experienced a strong result in FSVs approved up 18% (106) and TSVs up 25% (216).

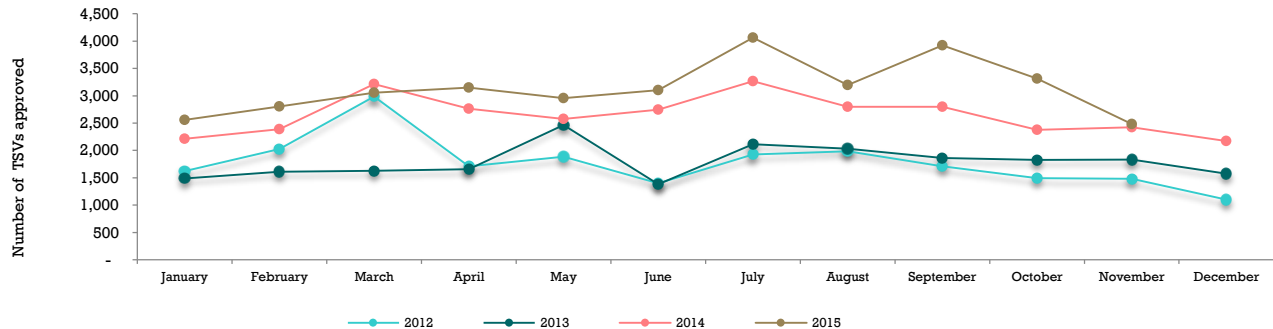
Private Training Establishments (PTE):



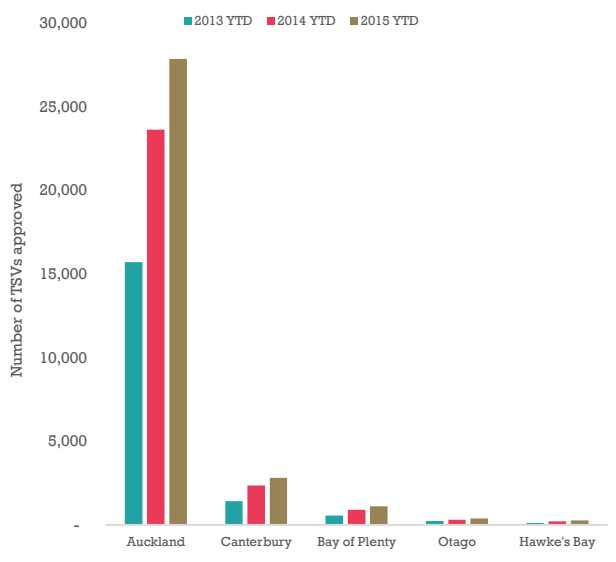
	November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV							
	↑	105	11%	→	-46	-3%	→	59	2%	↑	3,520	29%	↑	1,513	9%	↑	5,033	17%

YTD (January to November)

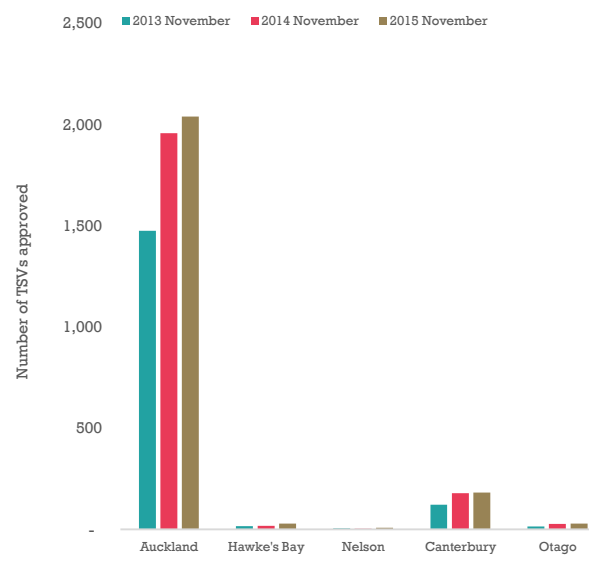
PTEs: Total student visas (TSVs) 2012 - 2015



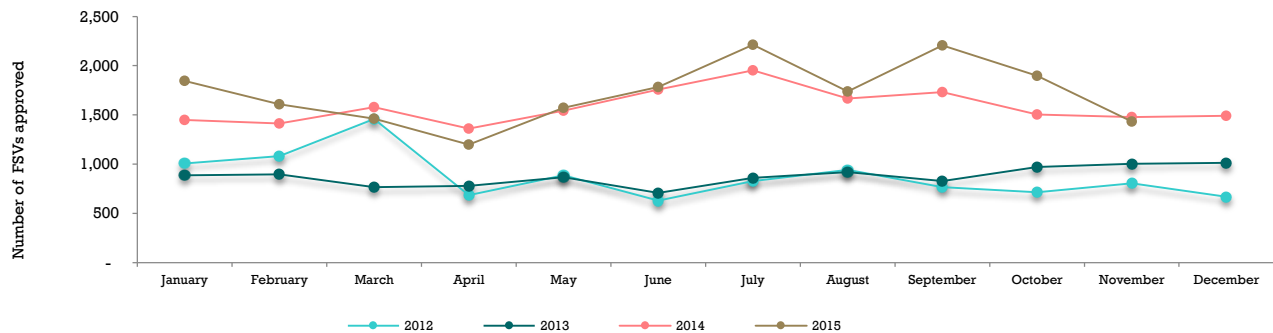
YTD top five regional changes (TSVs)



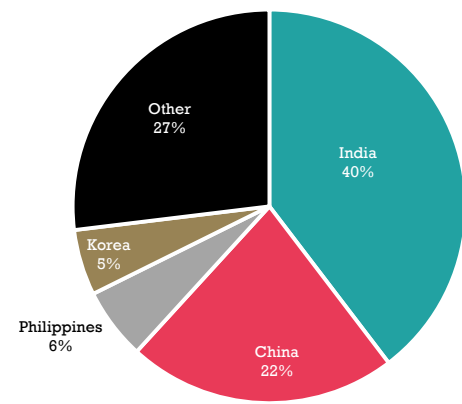
November top five regional changes (TSVs)



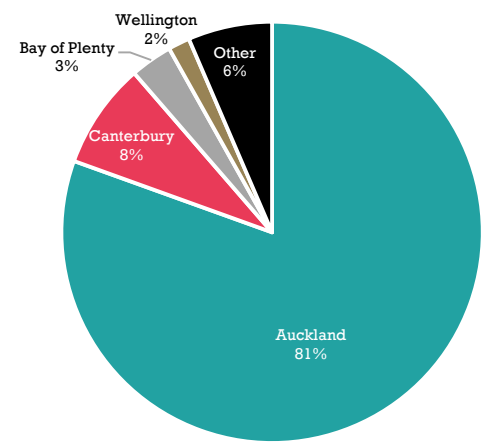
PTEs: First time student visas (FSVs) 2012 - 2015



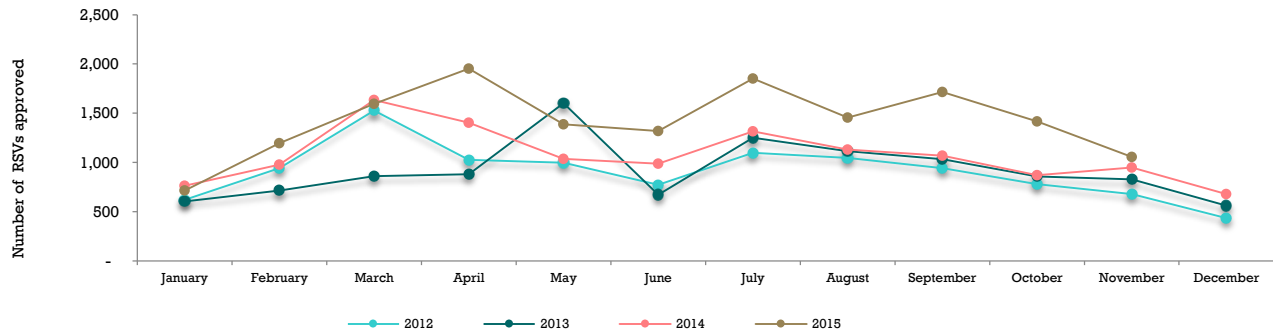
YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



PTEs: Returning student visas (RSVs) 2012 - 2015



Takeaways:

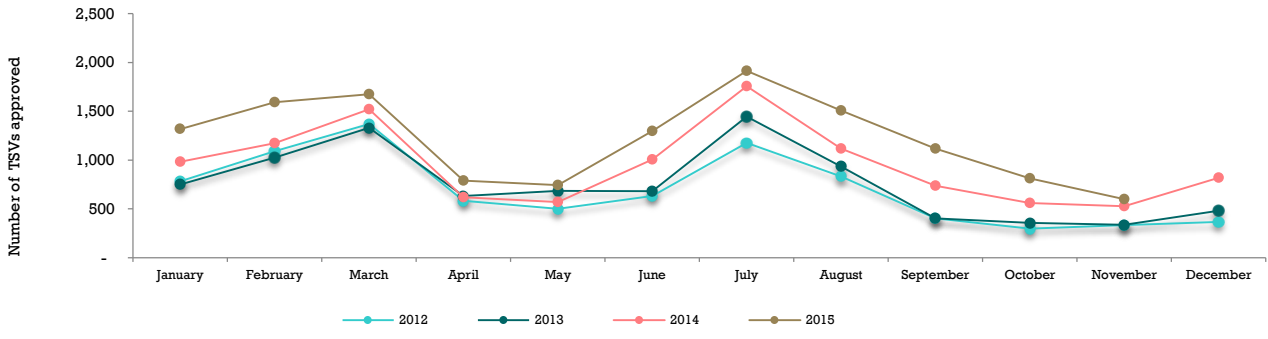
- YTD TSVs continue to experience strong growth, up 17% (5,033) and FSVs up 9% (1,513).
- November results were mixed with FSVs flat, down 3% (-46) and RSVs up 11% (105).
- 81% of TSVs YTD in the PTE sector have been in the Auckland region.

Institutes of Technology and Polytechnics (ITPs):

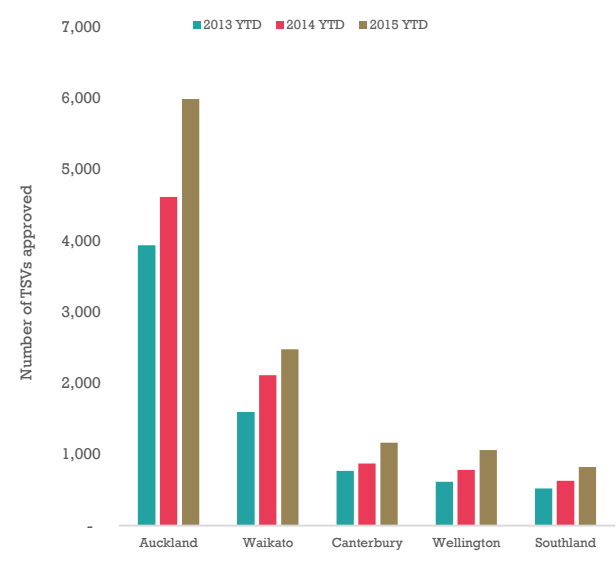


November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
↑ 61 58%	→ 12 3%	↑ 73 14%	↑ 842 15%	↑ 1,952 41%	↑ 2,794 26%

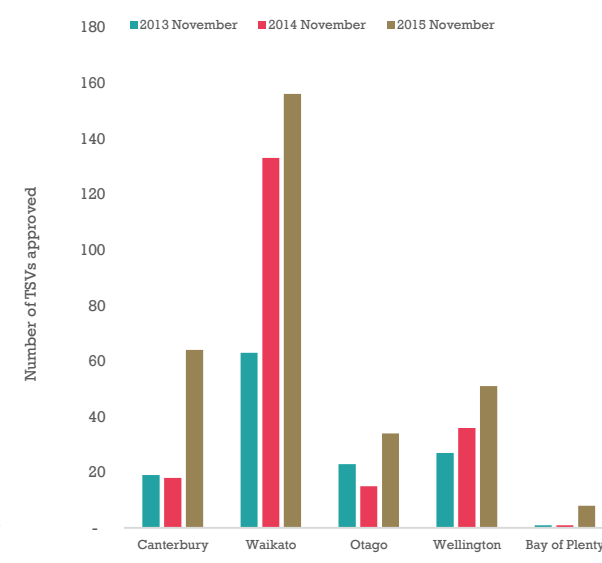
ITPs: Total student visas (TSVs) 2012 - 2015



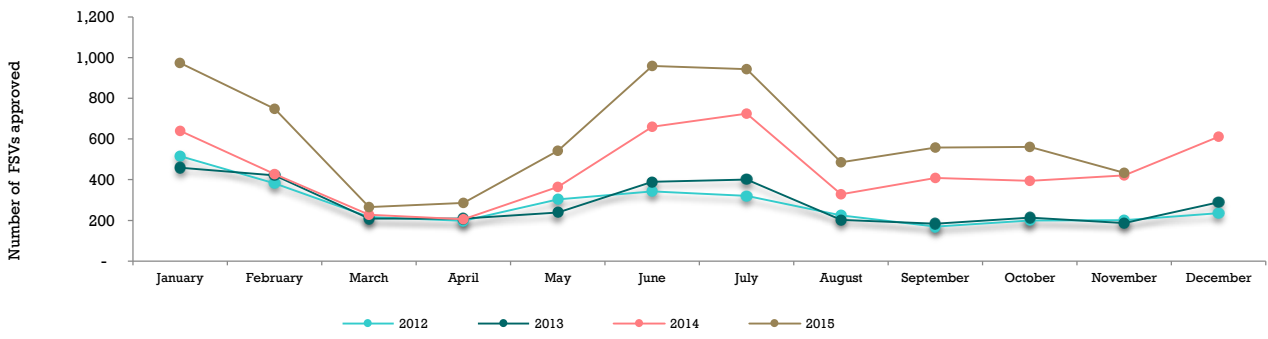
YTD top five regional changes (TSVs)



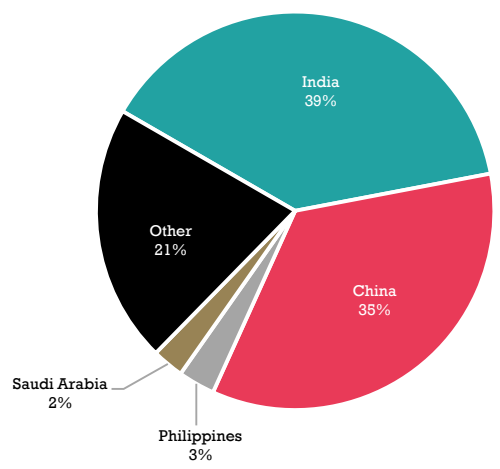
November top five regional changes (TSVs)



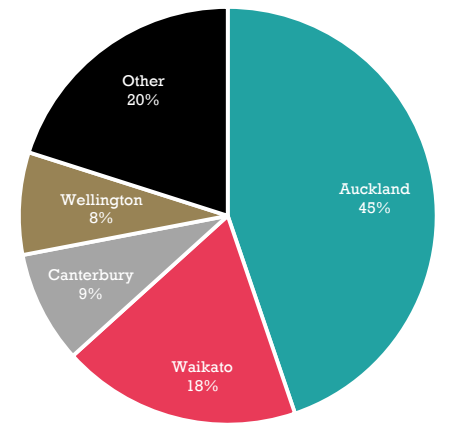
ITPs: First time student visas (FSVs) 2012 - 2015



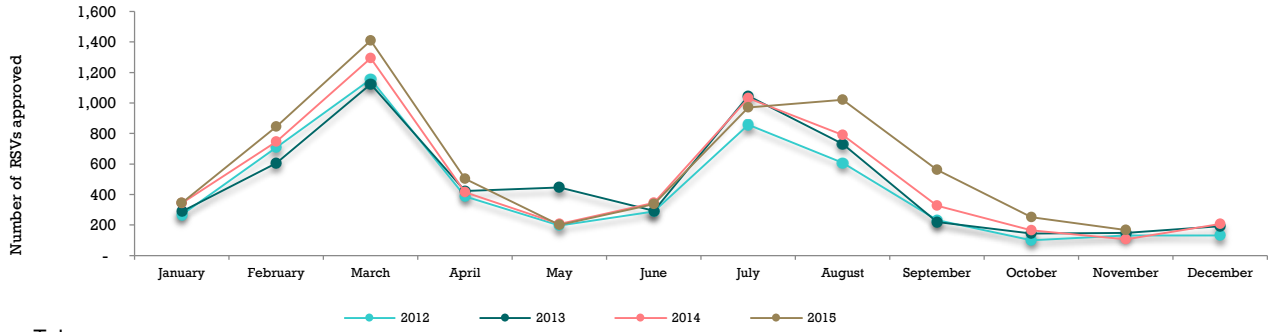
YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



ITPs: Returning student visas (RSVs) 2012 - 2015

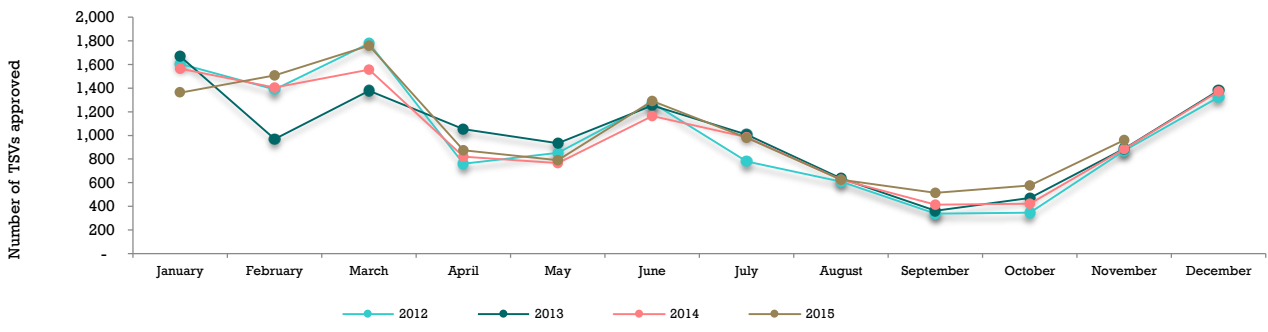


- Takeaways:**
- ITPs have grown particularly strongly YTD, up 26% (2,794).
 - November FSVs were flat, up 3% (12) and TSVs up 14% (73).
 - The top four regions (Auckland, 45%; Waikato, 18%; Canterbury, 9%; and Wellington, 8%) together comprise 80% of YTD TSVs.

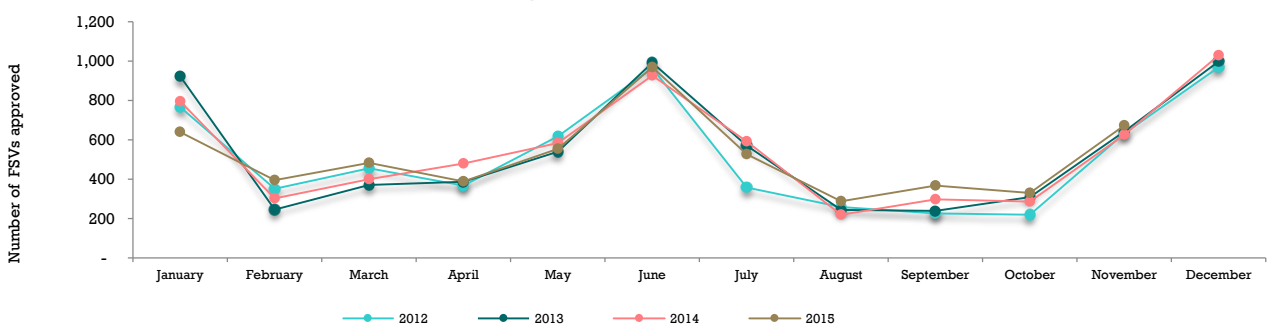
Secondary Schools:

November RSV		November FSV		November TSV		YTD RSV		YTD FSV		YTD TSV		
↑	28	11%	↑	48	8%	↑	76	9%	↑	529	10%	
									→	108	2%	
										↑	637	6%

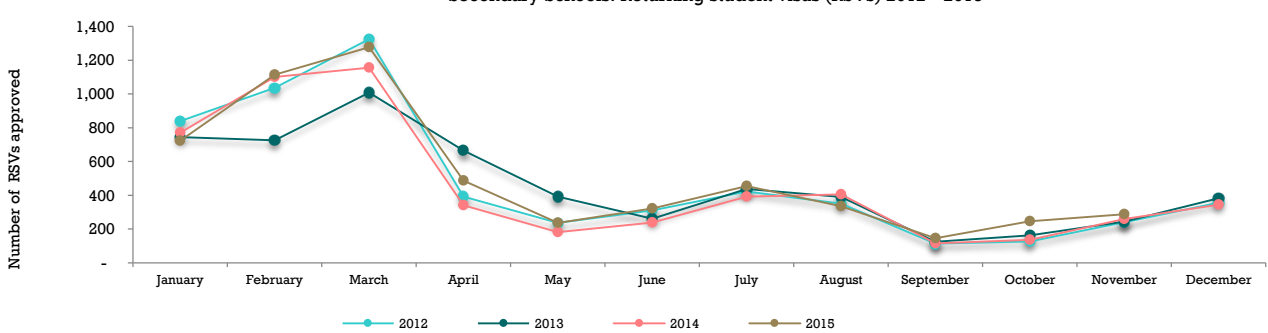
Secondary Schools: Total student visas (TSVs) 2012 - 2015



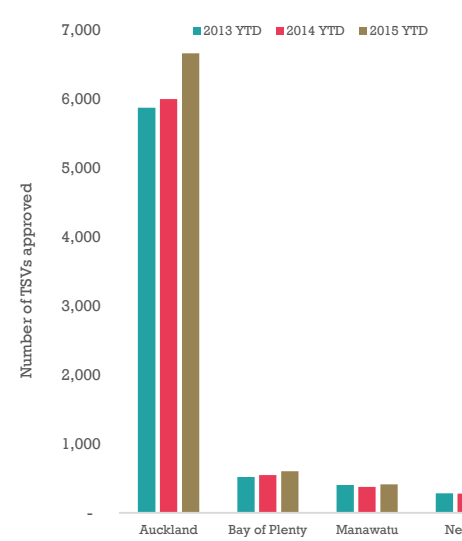
Secondary Schools: First time student visas (FSVs) 2012 - 2015



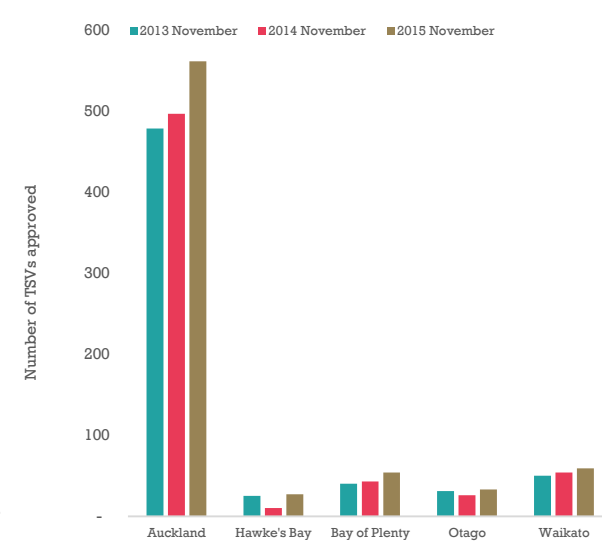
Secondary Schools: Returning student visas (RSVs) 2012 - 2015



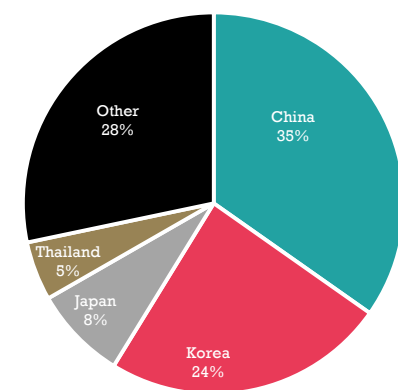
YTD top five regional changes (TSVs)



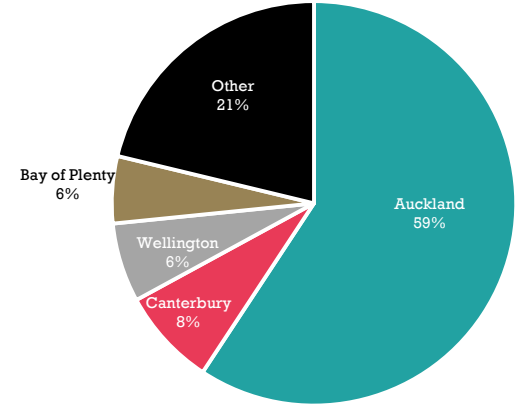
November top five regional changes (TSVs)



YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



Takeaways:

- Secondary Schools YTD TSVs are up 6% (637) while FSVs are flat, up 2% (108).
- The top four regions (Auckland, 59%; Canterbury, 8%; Wellington, 6%; and the Bay of Plenty, 6%) together comprise approximately 79% of YTD TSVs.
- China is the largest contributor of TSVs YTD, with 35% of total followed by Korea with 24%.

Primary Schools:



November RSV
 ↓ -2 -15%

November FSV
 ↓ -3 -17%

November TSV
 ↓ -5 -16%

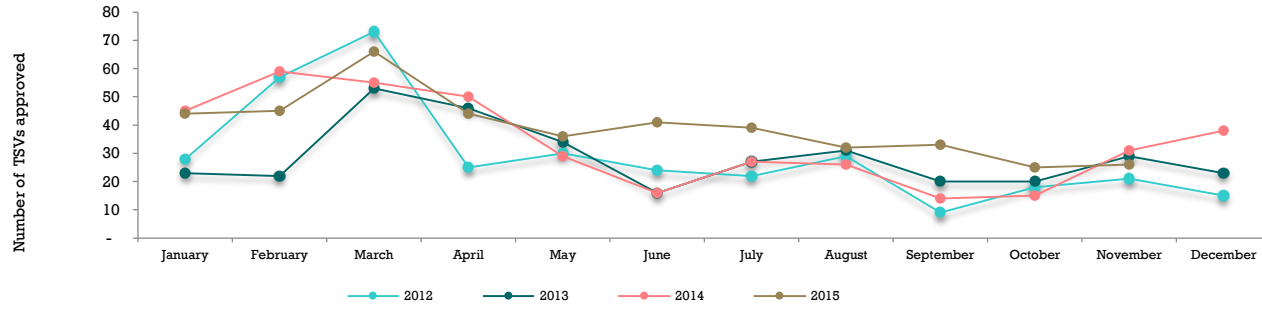
YTD RSV
 ↑ 11 6%

YTD FSV
 ↑ 53 27%

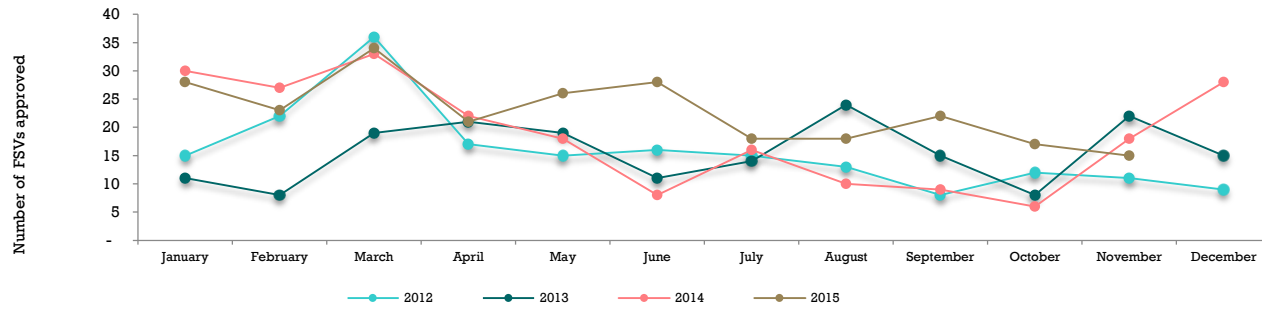
YTD TSV
 ↑ 64 17%

YTD (January to November)

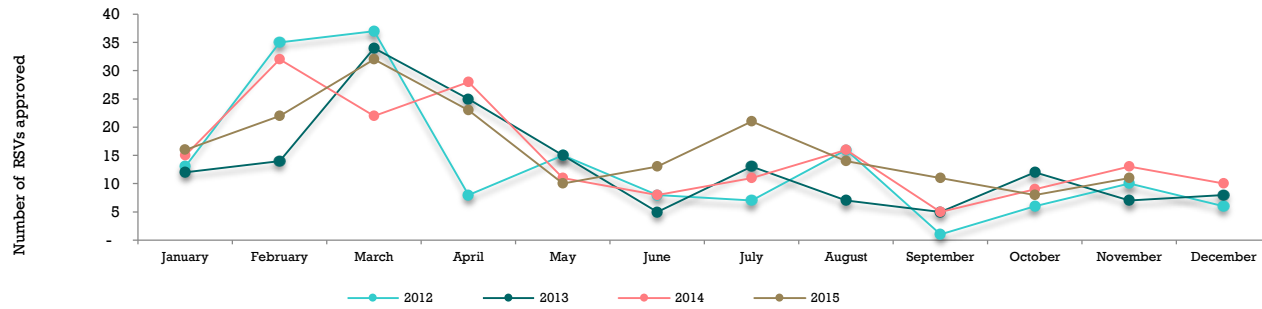
Primary Schools: Total student visas (TSVs) 2012 - 2015



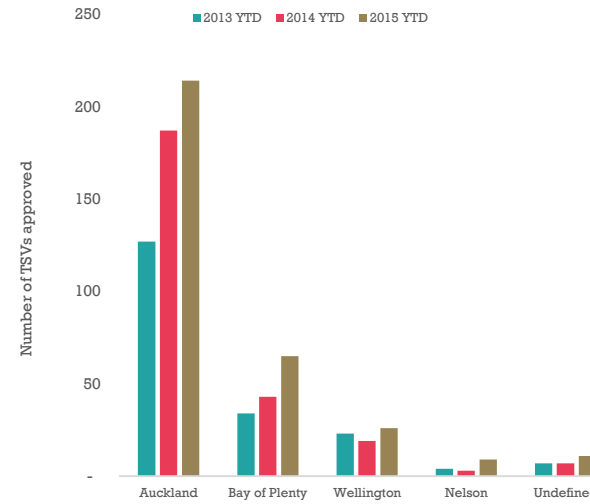
Primary Schools: First time student visas (FSVs) 2012 - 2015



Primary Schools: Returning student visas (RSVs) 2012 - 2015



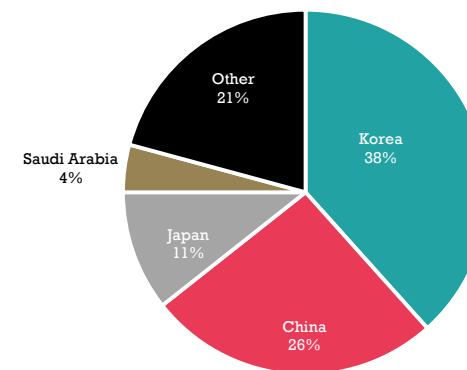
YTD top five regional changes (TSVs)



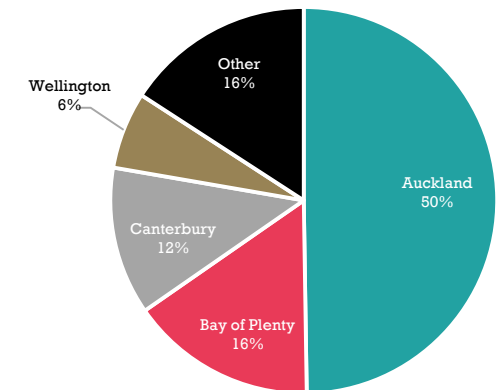
November top five regional changes (TSVs)



YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



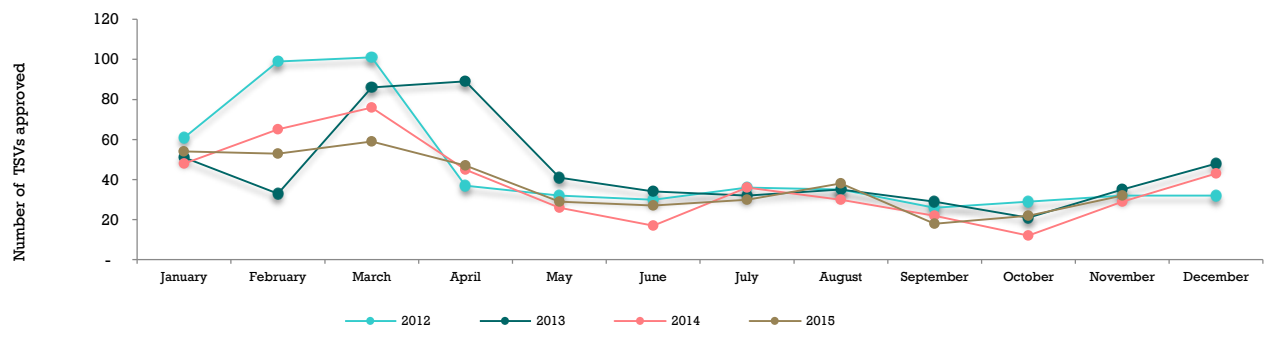
Takeaways:

- Primary Schools have tracked positively during 2015, up 17% (64) in TSVs YTD, despite November's negative results in TSVs down 16% (-5).
- Auckland has 50% of all TSVs YTD, the Bay of Plenty with 16%, and Canterbury comprises 12%.
- Korea is the largest market for primary schools, comprising 38% of TSVs YTD; followed by China, with 26%.

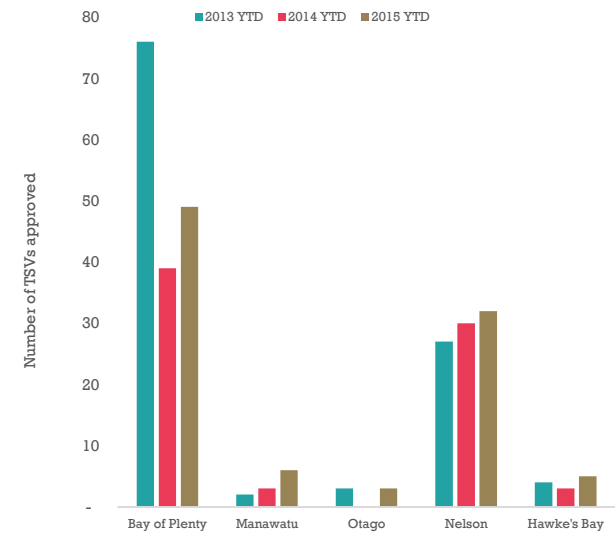
Intermediate Schools:

November RSV	November FSV	November TSV	YTD RSV	YTD FSV	YTD TSV
↑ 11 122%	↓ -8 -40%	↑ 3 10%	↑ 9 5%	→ -6 -3%	→ 3 1%

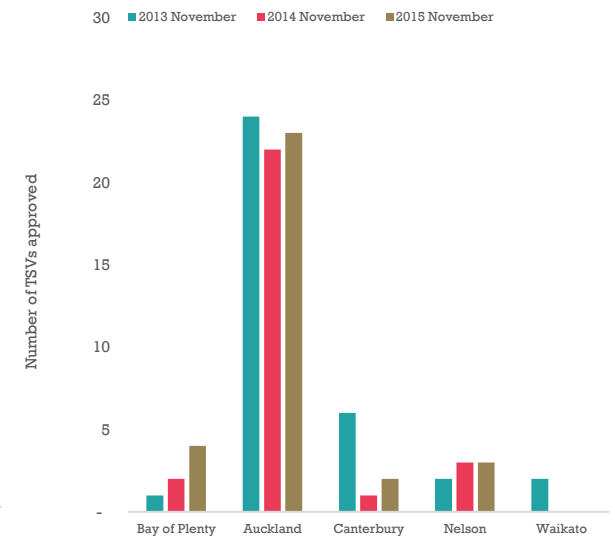
Intermediate Schools: Total student visas (TSVs) 2012 - 2015



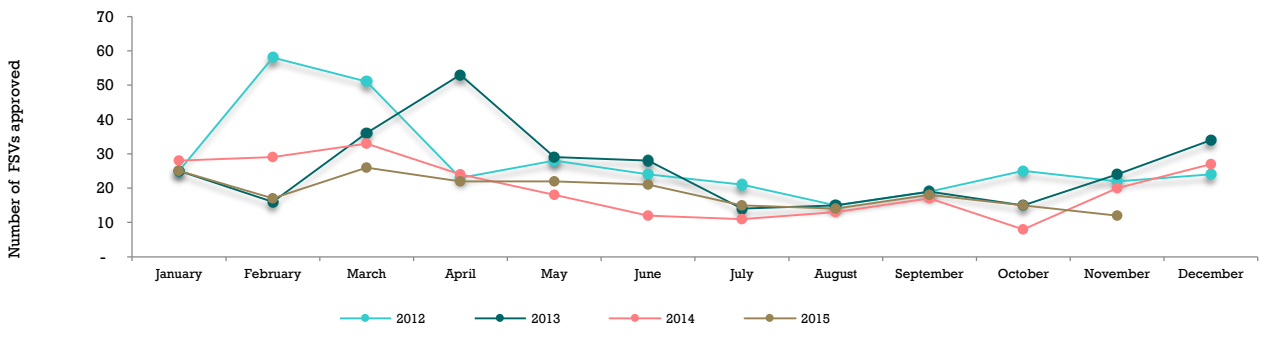
YTD top five regional changes (TSVs)



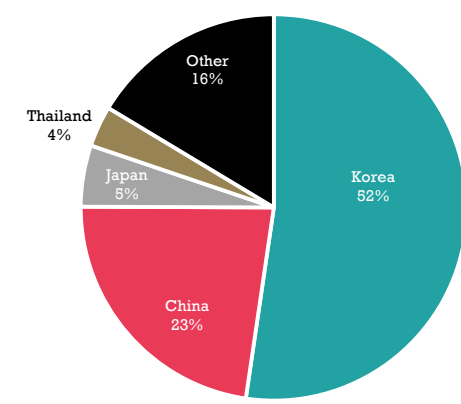
November top five regional changes (TSVs)



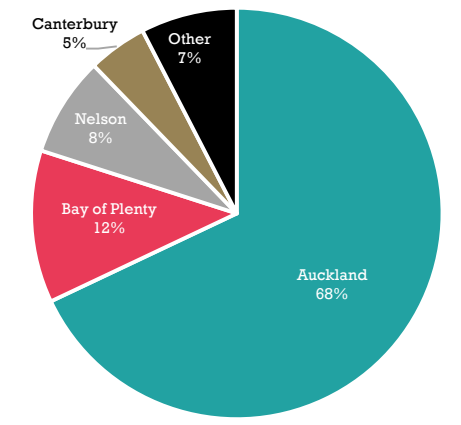
Intermediate Schools: First time student visas (FSVs) 2012 - 2015



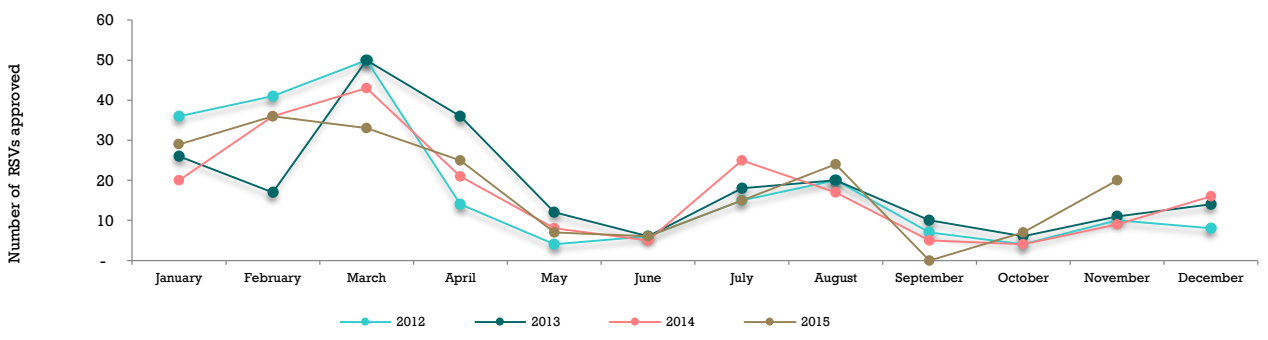
YTD 2015 country breakdown of TSVs



YTD 2015 regional breakdown of TSVs



Intermediate Schools: Returning student visas (RSVs) 2012 - 2015



Takeaways:

- Intermediate Schools have been flat during 2015, with TSVs YTD up 1% (3) in TSV. November results for RSVs were positive up 122% (11).
- Auckland has captured 68% of TSVs YTD, followed by the Bay of Plenty with 12% and Nelson with 8%.
- Korea has contributed 52% of all YTD TSVs while China contributed 23%.