



Student Visa Dashboard

January 2016



Table of contents

Pages 3-11	Overall student visa trends
Pages 12-32	Trends by market
Pages 33-39	Trends by sector
Pages 40-53	Trends by region
Page 54	Appendix



Overall student visa trends



ThinkNew | NEW ZEALAND
EDUCATION

January trends

Markets

- January total student visa results (TSVs) declined by 12% (-985) and first time student visas declined by 20% (-1,112), when compared to the same period in 2015.
- The decline was driven by India and USA and is suspected that the decline is due to Indian and American students arriving earlier (in late 2015), than in previous years.
- China and Germany experienced strong growth for the start of the new academic year.

Regions

- With the exception of the West Coast, all regions declined or experienced flat results in January.
- Auckland, Waikato, and Otago saw the biggest declines.
- Canterbury saw a flat result with a 3% (25) increase in TSVs.

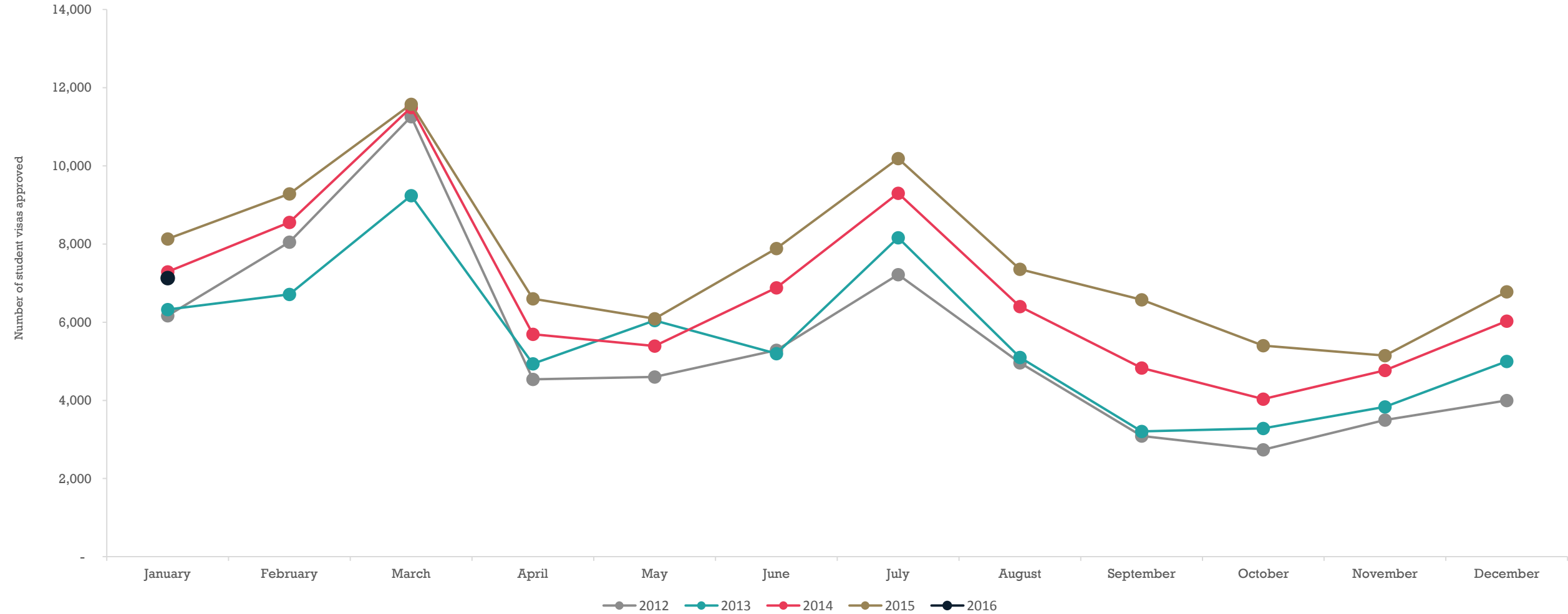
Sectors

- All sectors declined in January.
- The PTE and University sectors saw the biggest declines, which was driven by declines in Indian and American students.

TSVs for January	Change	% change	FSVs for January	Change	% change
China	184	10%	Germany	40	43%
Germany	31	27%	China	23	3%
Iran	28	311%	Iran	19	633%
Korea	18	5%	Denmark	15	125%
Nepal	16	73%	Nepal	13	81%
Saudi Arabia	-46	-33%	Philippines	-21	-17%
Brazil	-80	-25%	Singapore	-23	-52%
Thailand	-104	-21%	Brazil	-68	-23%
USA	-230	-30%	USA	-231	-31%
India	-651	-34%	India	-736	-43%

Sector TSVs for January	Change	% change	Sector FSVs for January	Change	% change
Intermediate	-4	-7%	Intermediate	-10	-40%
Primary	-18	-41%	Primary	-14	-50%
ITPs	-110	-8%	Secondary	-62	-10%
Secondary	-123	-9%	ITPs	-149	-15%
Universities	-216	-8%	Universities	-287	-16%
PTEs	-494	-19%	PTEs	-571	-31%

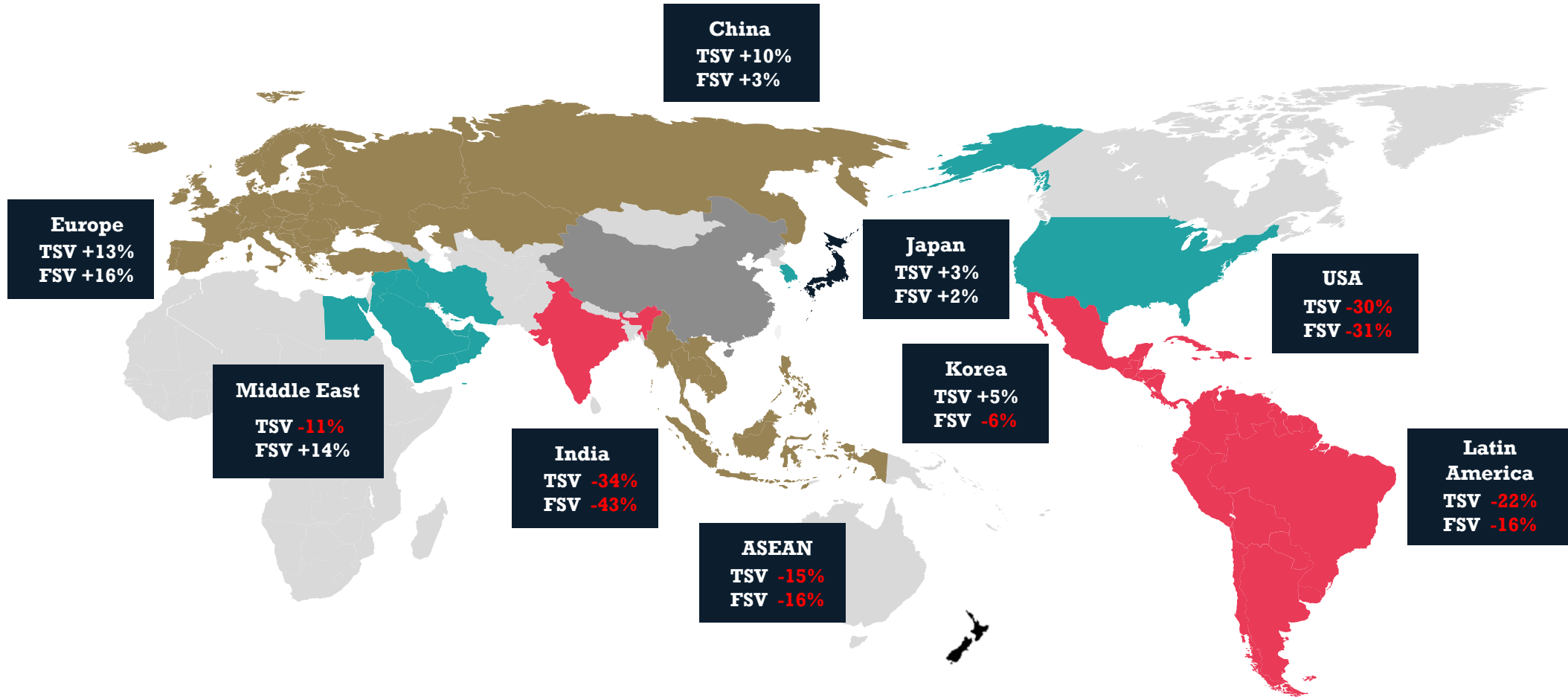
Cumulative tracker



Key takeaways:

- The first month of 2016, was a slower start in total-student-visas approved than in January 2015, down 12% (-985), however is tracking above with results seen in January of 2014.

Market overview (Year-to-date)



January/Year-to-date:

Total student visas were down 12% (-985) overall on January 2015 overall. First time student visas were also down, 20% (-1,112)

Overall market performance

Top 20 markets (in order of 2016 volume)

Indicator	YTD TSVs	2015	2016	Change in numbers	% change
↑	China	1,761	1,945	184	10%
↓	India	1,899	1,248	-651	-34%
↓	USA	776	546	-230	-30%
↑	Korea	376	394	18	5%
↓	Thailand	485	381	-104	-21%
→	Japan	303	311	8	3%
↓	Brazil	322	242	-80	-25%
↑	Germany	115	146	31	27%
→	Malaysia	151	145	-6	-4%
↓	Philippines	135	124	-11	-8%
↓	Viet Nam	146	121	-25	-17%
↓	Hong Kong	148	120	-28	-19%
→	Fiji	95	95	0	0%
↓	Saudi Arabia	139	93	-46	-33%
↓	Colombia	89	82	-7	-8%
↓	Taiwan	77	73	-4	-5%
↑	France	64	67	3	5%
→	Indonesia	65	66	1	2%
↓	Canada	65	60	-5	-8%
↓	Great Britain	73	58	-15	-21%
	Grand Total	8,131	7,146	- 985	-12%

Indicator	YTD FSVs	2015	2016	Change in numbers	% change
↓	India	1,709	973	-736	-43%
→	China	768	791	23	3%
↓	USA	744	513	-231	-31%
↓	Brazil	297	229	-68	-23%
→	Japan	195	199	4	2%
↓	Korea	178	167	-11	-6%
↑	Germany	93	133	40	43%
↓	Philippines	121	100	-21	-17%
→	Thailand	89	86	-3	-3%
→	Malaysia	87	85	-2	-2%
↑	Fiji	61	71	10	16%
↓	Colombia	75	69	-6	-8%
↓	Viet Nam	72	58	-14	-19%
→	Canada	56	55	-1	-2%
↑	France	46	49	3	7%
↓	Great Britain	64	45	-19	-30%
↑	Indonesia	41	43	2	5%
→	Tonga	36	36	0	0%
↓	Chile	50	34	-16	-32%
↓	Sri Lanka	50	34	-16	-32%
	Grand Total	5,444	4,332	- 1,112	-20%

Sector overview (Year-to-date)

This gives a breakdown of the key changes by markets and regions (vertically) in sectors (horizontally)

Sectors YTD											
Primary		Intermediate		Secondary		ITP		PTE		University	
TSV	-41% (-18)	TSV	-7% (-4)	TSV	-9% (-123)	TSV	-8% (-110)	TSV	-19% (-494)	TSV	-8% (-216)
FSV	-50% (-14)	FSV	-40% (-10)	FSV	-10% (-62)	FSV	-15% (-149)	FSV	-31% (-571)	FSV	-16% (-287)
Markets TSV											
China	150% (6)	Taiwan	300% (3)	Germany	75% (24)	China	8% (24)	China	20% (98)	China	7% (48)
Taiwan	N/A% (1)	Hong Kong	N/A% (1)	Korea	9% (12)	Philippines	100% (16)	Brazil	30% (26)	Iran	338% (27)
Japan	0% (0)	Netherlands	N/A% (1)	China	4% (11)	Japan	43% (12)	Nepal	325% (13)	Germany	39% (15)
Regions TSV											
Wellington	N/A% (2)	Bay of Plenty	63% (5)	Canterbury	13% (15)	Otago	81% (25)	Other	40% (2)	Canterbury	14% (44)
Hawke's Bay	N/A% (1)	Nelson	14% (1)	Nelson	26% (11)	Wellington	20% (19)	Southland	N/A% (1)	Bay of Plenty	-50% (-1)
Manawatu	N/A% (1)	Taranaki	N/A% (1)	Taranaki	83% (5)	Manawatu	144% (13)	Taranaki	-6% (-1)	Southland	-50% (-2)

Markets

- The primary schools, ITP, PTE and university sector experienced growth from China for January 2016. Secondary schools and universities, experienced growth from the German market.

Regional

- The secondary school, ITP and university sector experienced strong growth in the Canterbury region. While the PTE sector saw significant growth in the Otago region.

Overall regional performance

(Listed in order of 2016 volume)

Indicator	YTD TSVs	2015	2016	Change in numbers	% change
↓	Auckland	4,538	3,992	-546	-12%
→	Canterbury	746	771	25	3%
↓	Wellington	670	603	-67	-10%
↓	Otago	610	509	-101	-17%
↓	Waikato	539	435	-104	-19%
↓	Manawatu	262	209	-53	-20%
↓	Bay of Plenty	202	156	-46	-23%
↓	Nelson	121	106	-15	-12%
↓	Hawke's Bay	108	103	-5	-5%
↓	Southland	132	95	-37	-28%
→	Other	111	84	-27	-24%
→	Taranaki	38	39	1	3%
↓	Northland	41	36	-5	-12%
↓	Gisborne	10	5	-5	-50%
↑	West Coast	2	3	1	50%
	Grand Total	8,131	7,146	- 985	-12%

Indicator	YTD FSVs	2015	2016	Change in numbers	% change
↓	Auckland	2,953	2,249	-704	-24%
↓	Canterbury	511	488	-23	-5%
↓	Wellington	504	428	-76	-15%
↓	Otago	443	346	-97	-22%
↓	Waikato	369	285	-84	-23%
↓	Manawatu	184	138	-46	-25%
↓	Bay of Plenty	128	88	-40	-31%
↓	Other	92	73	-19	-21%
↑	Hawke's Bay	67	71	4	6%
↓	Nelson	65	60	-5	-8%
↓	Southland	73	48	-25	-34%
↑	Northland	21	30	9	43%
→	Taranaki	27	26	-1	-4%
↓	Gisborne	4	1	-3	-75%
↓	West Coast	2	1	-1	-50%
	Grand Total	5,444	4,332	- 1,112	-20%

NZ Regions overview (Year-to-date)

This gives a breakdown of the key changes by markets and sector (vertically) in region (horizontally)

Regions YTD											
Auckland		Canterbury		Manawatu		Otago		Waikato		Wellington	
TSV	-12% (-546)	TSV	3% (25)	TSV	-20% (-53)	TSV	-17% (-101)	TSV	-19% (-104)	TSV	-10% (-76)
FSV	-24% (-704)	FSV	-5% (-23)	FSV	-25% (-46)	FSV	-22% (-97)	FSV	-23% (-84)	FSV	-15% (-76)
Markets TSV											
China	15% (180)	India	15% (19)	Iran	N/A% (5)	China	28% (13)	Philippines	325% (13)	China	12% (15)
Malaysia	26% (16)	China	5% (9)	Brazil	44% (4)	India	75% (12)	Malaysia	120% (6)	Taiwan	125% (5)
Denmark	280% (14)	France	800% (8)	Viet Nam	44% (4)	Germany	92% (11)	Colombia	N/A% (3)	Japan	8% (4)
Sectors TSV											
Intermediate	-19% (-6)	Universities	14% (44)	ITP	133% (12)	ITP	81% (25)	Primary	-33% (-1)	ITP	20% (19)
Universities	-1% (-8)	Secondary	13% (15)	Primary	N/A% (1)	Intermediate	0% (0)	Intermediate	-100% (-1)	Primary	N/A% (2)
Primary	-38% (-9)	ITP	13% (15)	PTE	-49% (-22)	PTE	-25% (-9)	PTE	-13% (-8)	PTE	-25% (-16)

Markets

- Auckland saw strong growth from China and Malaysia.
- While India declined overall, Canterbury and Otago experienced growth from India.

Sectors

- The sectors saw mixed results across the regions.
The university sector declined in the Wellington, Auckland, Manawatu, Otago regions.

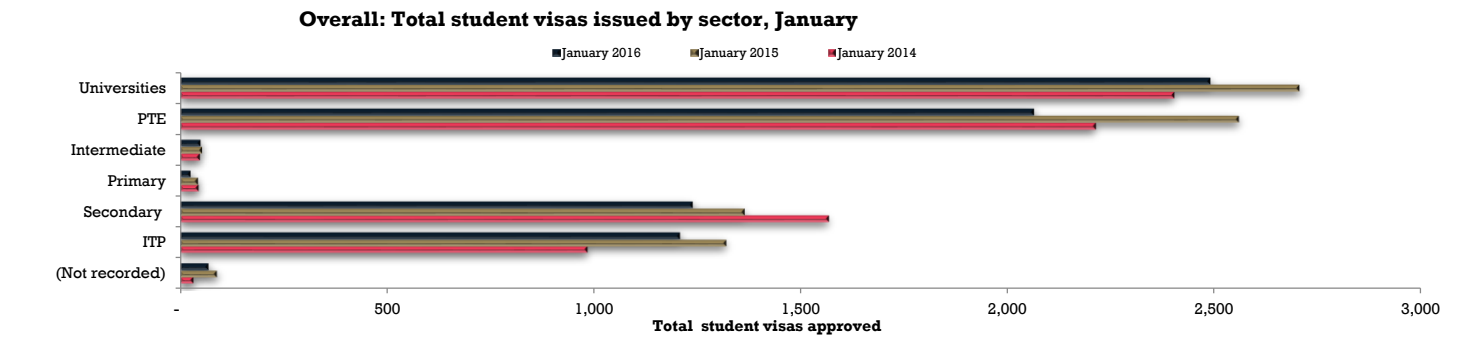
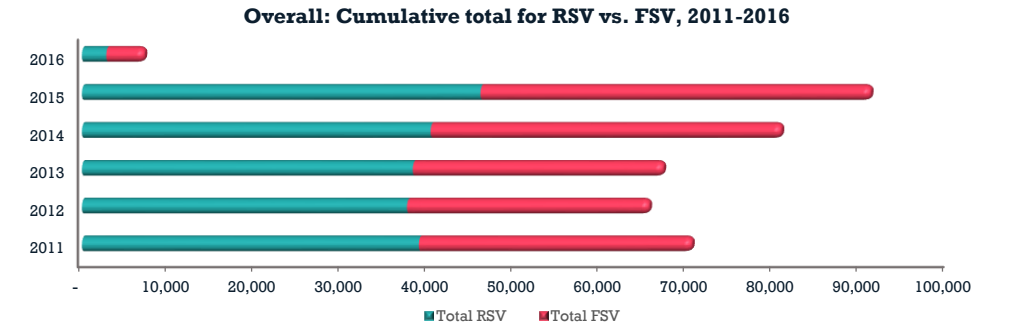
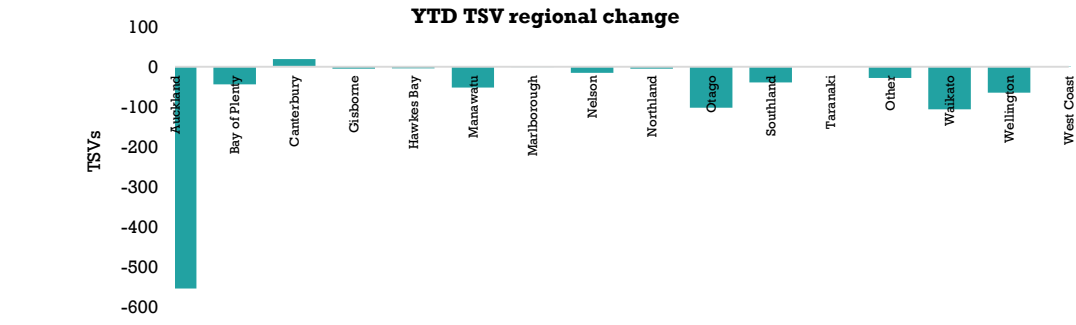
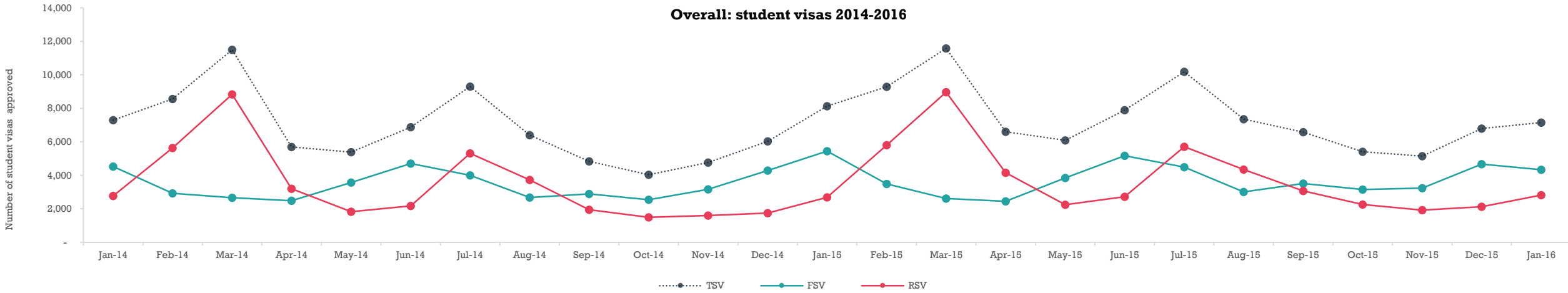
Trends by market



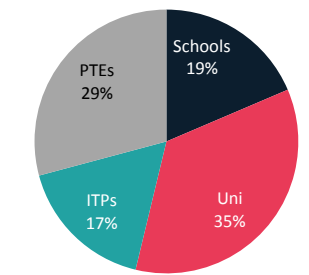
Overall:

YTD (January)

YTD RSV		YTD FSV		YTD TSV	
↑	127	5%	↓	-1,112	-20%
			↓	-985	-12%



YTD 2016 Sector breakdown of TSVs

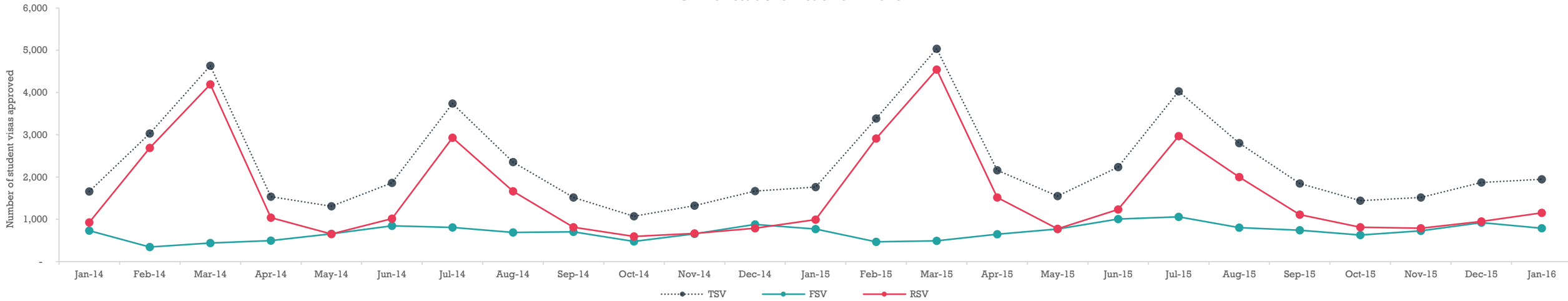


Key takeaways:

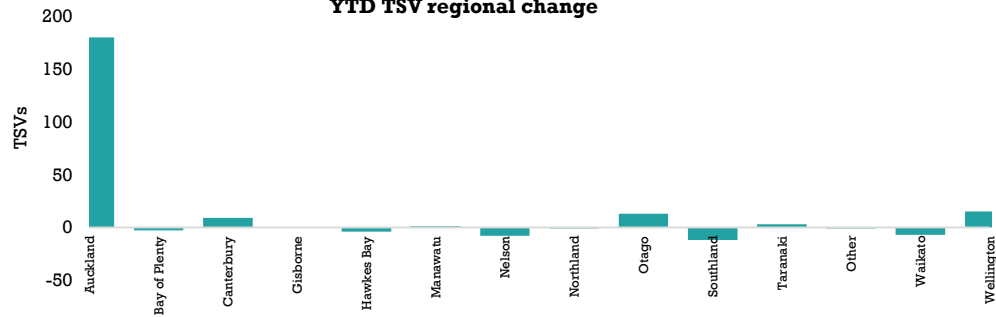
- Overall January results were mixed, TSV were down 12% (-985), FSVs down 20% (-1,112) and RSVs up 5% (127).
- The university sector accounted for 35% of TSVs approved in January followed by the PTE sector 29%.

YTD RSV		YTD FSV		YTD TSV	
↑ 161	16%	→ 23	3%	↑ 184	10%

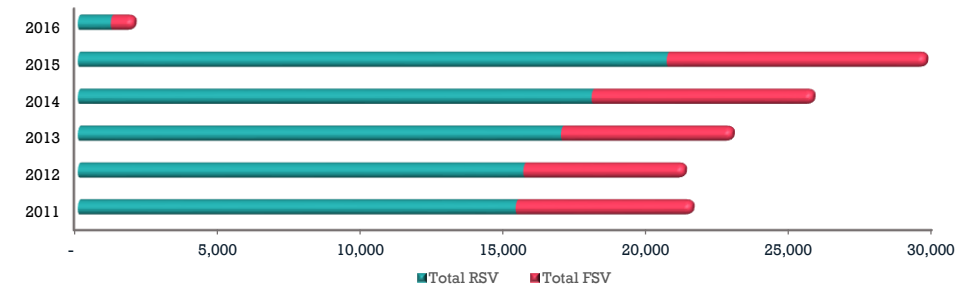
China: student visas 2014-2016



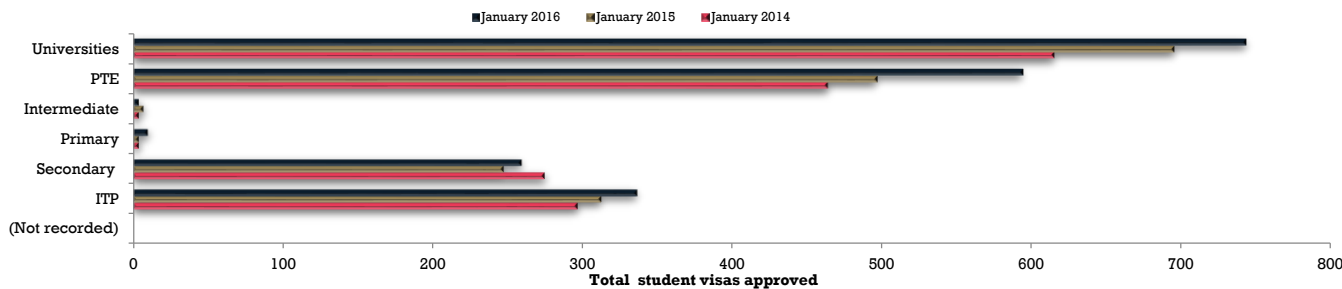
YTD TSV regional change



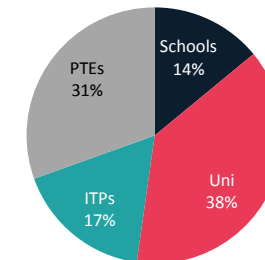
China: Cumulative total for RSV vs. FSV, 2011-2016



China: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs

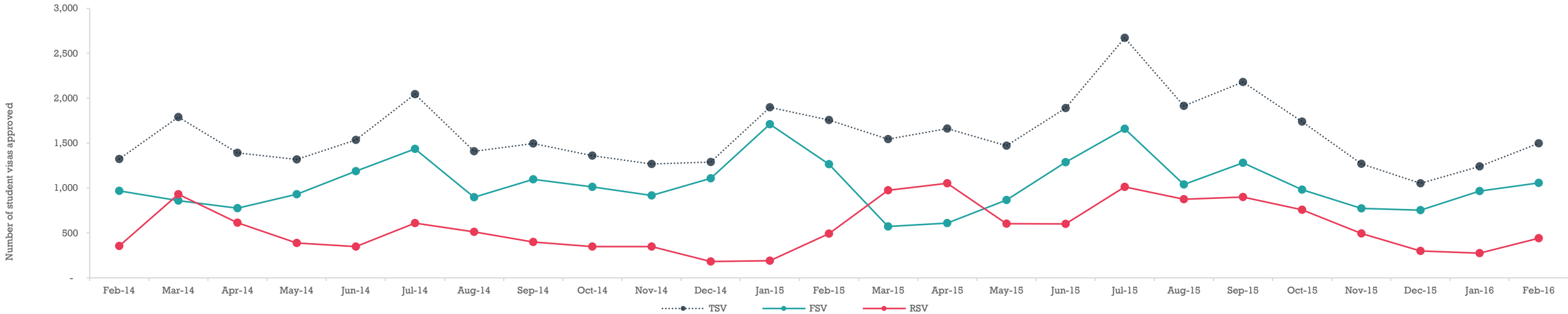


Key takeaways:

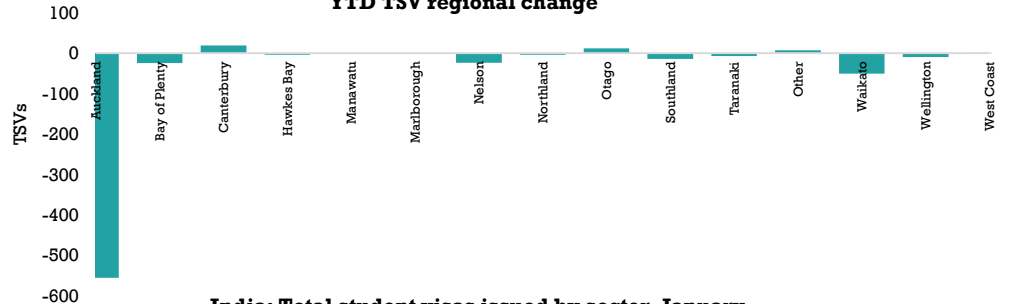
- China saw modest growth in January, up 10% (184) and FSV were flat up 3% (23).
- The university sector made up 38% of TSVs approved followed by the PTEs sector with 31%.

YTD RSV	YTD FSV	YTD TSV
↑ 85 45%	↓ -736 -43%	↓ -651 -34%

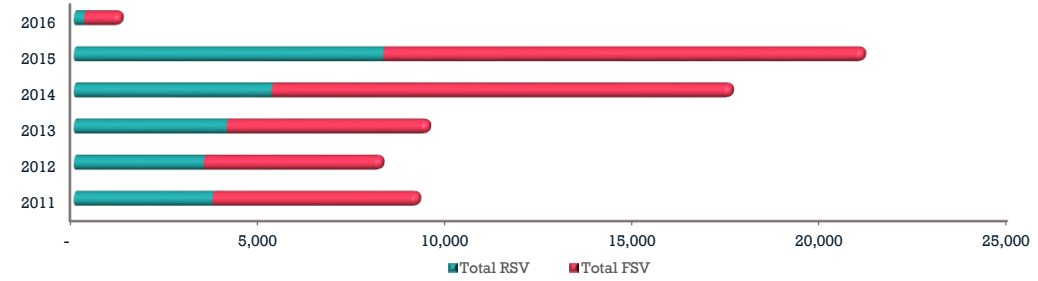
India: student visas 2014-2016



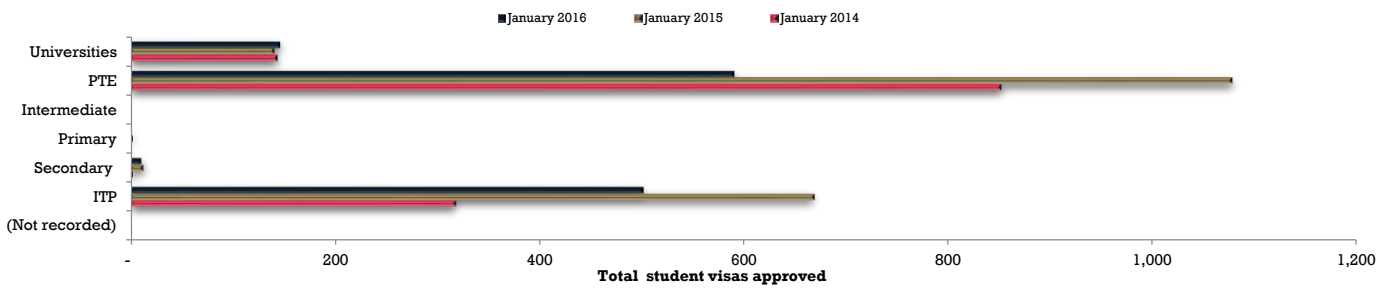
YTD TSV regional change



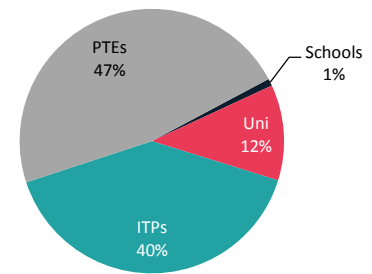
India: Cumulative total for RSV vs. FSV, 2011-2016



India: Total student visas issued by sector, January



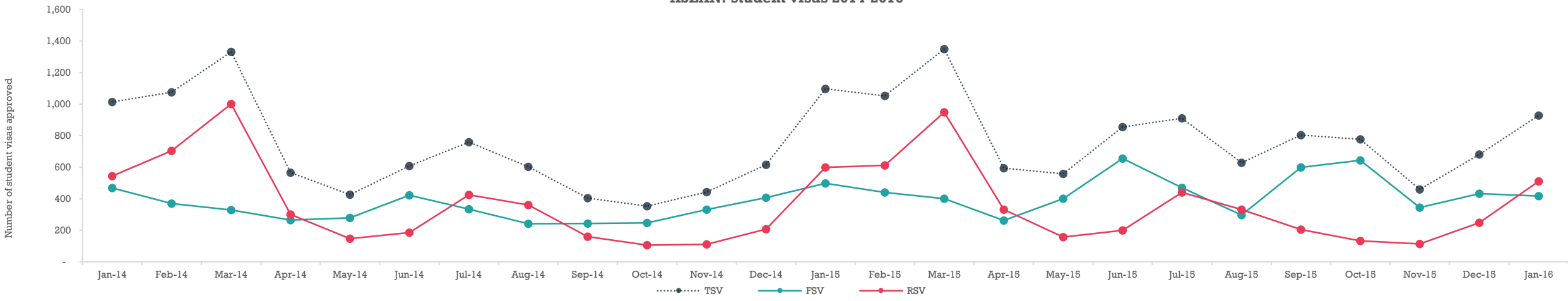
YTD 2016 Sector breakdown of TSVs



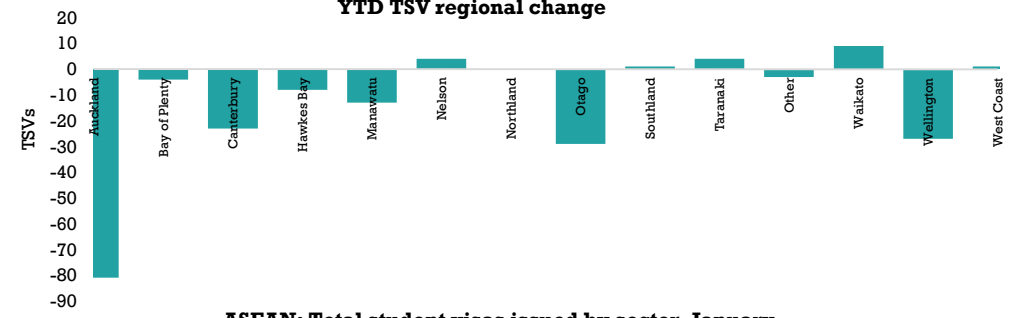
Key takeaways:

- Results for January were mixed with FSVs down 43% (-736), TSV down 34% (-651) and RSV up 45% (85).
- The PTE sector continues to make the majority of TSVs approved with 47%, followed by the ITP sector with 40%.

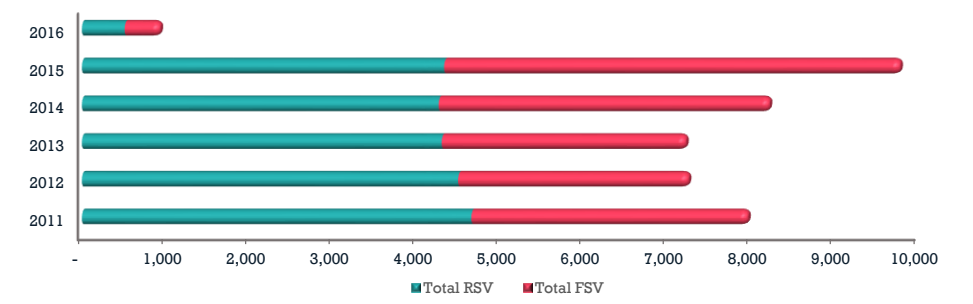
ASEAN: student visas 2014-2016



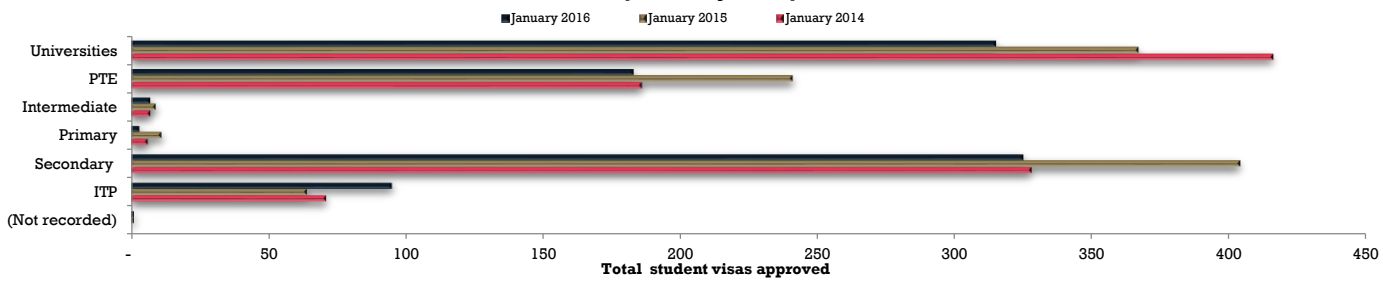
YTD TSV regional change



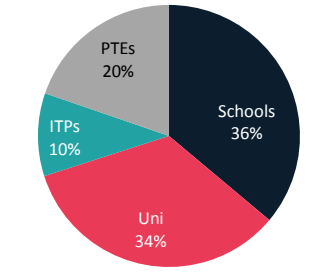
ASEAN: Cumulative total for RSV vs. FSV, 2011-2016



ASEAN: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs

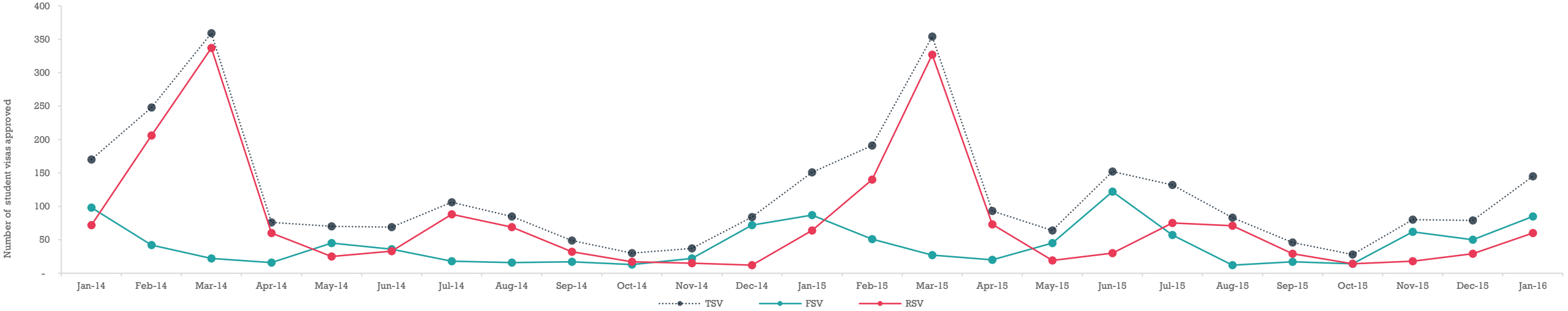


Key takeaways:

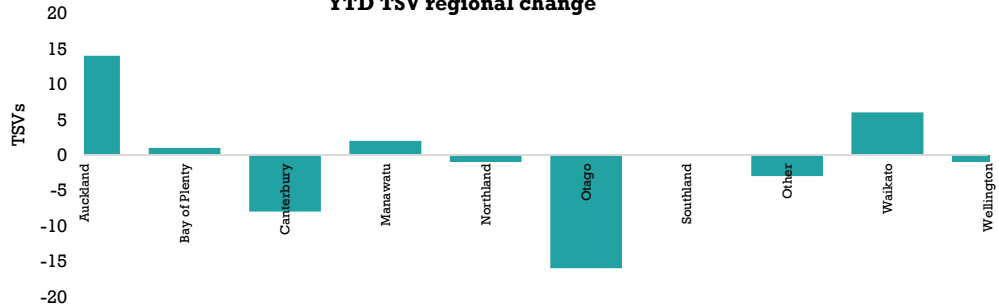
- ASEAN region saw a decline in TSVs, down 15% (-168) and FSVs down 16% (-80).
- The schools sector received 34% of TSVs while the university sector received 34% in January.

YTD RSV	YTD FSV	YTD TSV
↓ -4 -6%	→ -2 -2%	→ -6 -4%

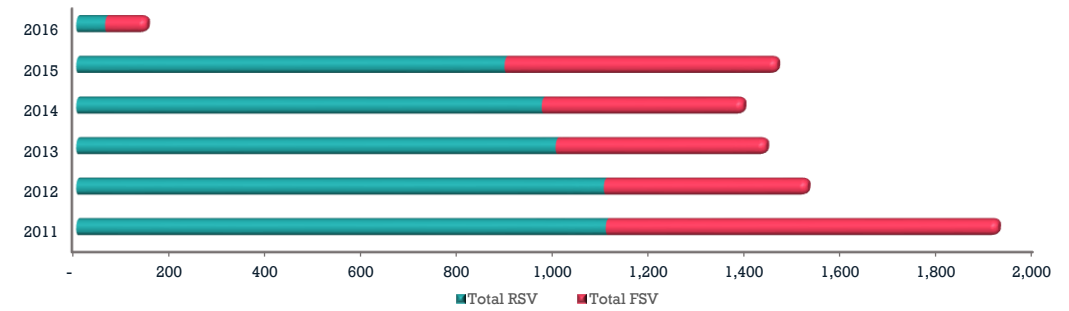
Malaysia: student visas 2014-2016



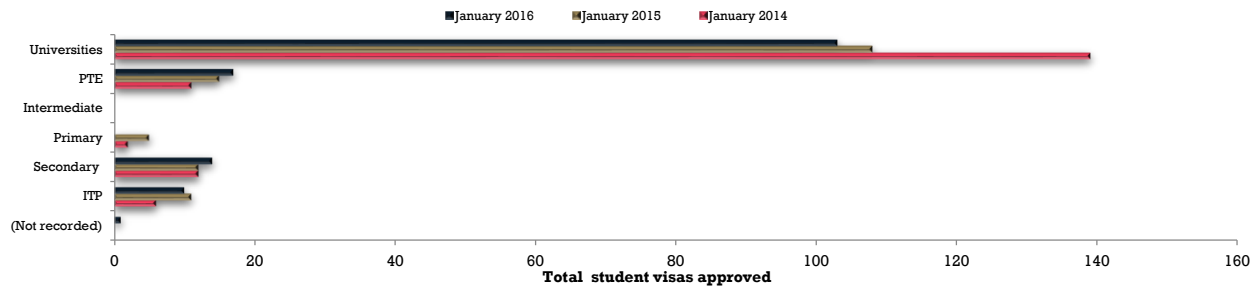
YTD TSV regional change



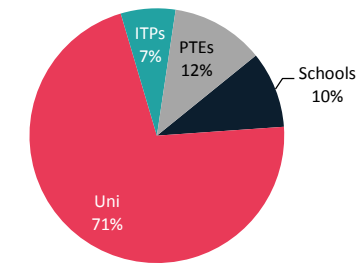
Malaysia: Cumulative total for RSV vs. FSV, 2011-2016



Malaysia: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs



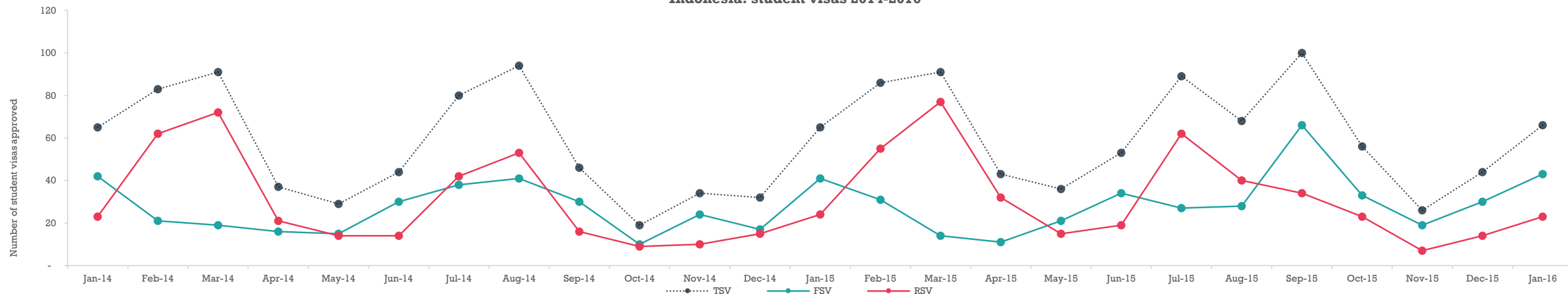
Key takeaways:

- Malaysia was flat in January with TSV down 4% (-6) and FSV down 2% (-2).
- The university sector made up the majority of TSVs approved in January, with 71%.

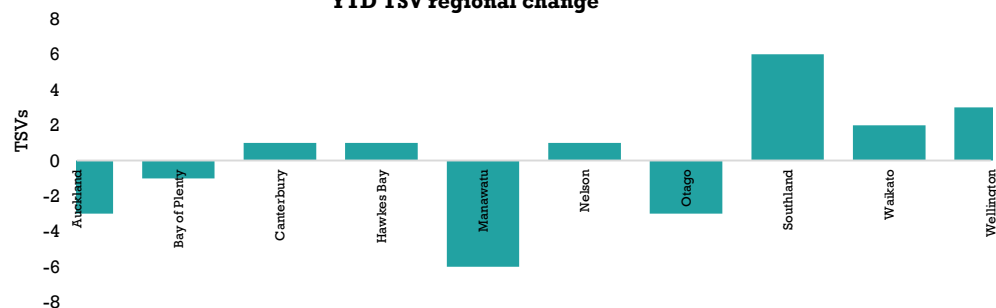
Indonesia:

YTD RSV	YTD FSV	YTD TSV
↘ -1	↗ 2	↔ 1
-4%	5%	2%

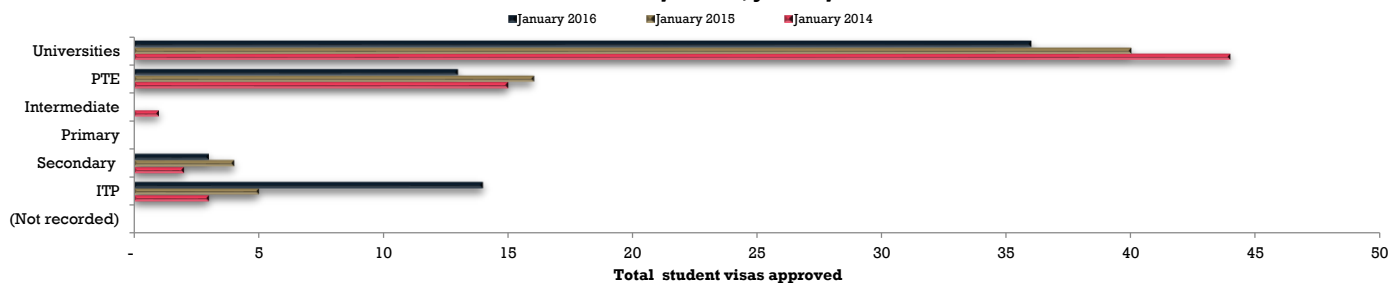
Indonesia: student visas 2014-2016



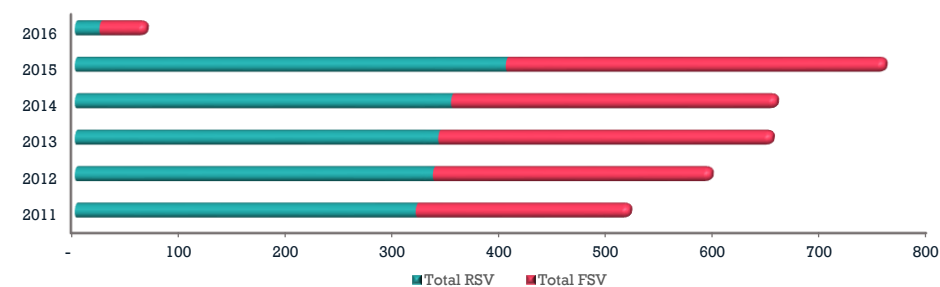
YTD TSV regional change



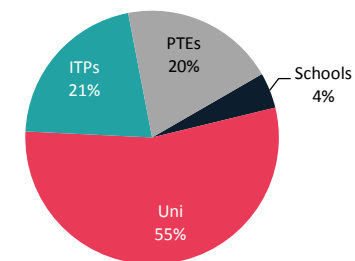
Indonesia: Total student visas issued by sector, January



Indonesia: Cumulative total for RSV vs. FSV, 2011-2016



YTD 2016 Sector breakdown of TSVs



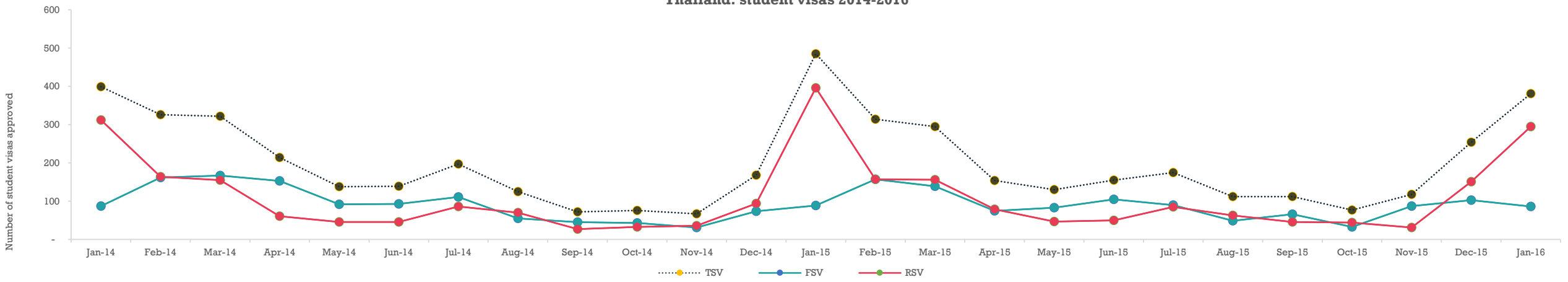
Key takeaways

- Indonesia results for January were mixed with TSVs flat at 2% (1) and FSVs up 5% (2).
- The university sector made up 55% of TSVs followed by the ITP sector with 21% YTD.

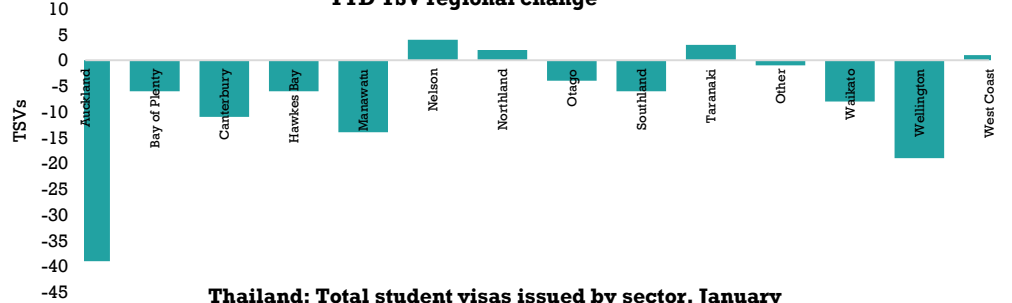
Thailand:

YTD RSV		YTD FSV		YTD TSV	
↓	-101	-26%	→	-3	-3%
↓	-104	-26%			

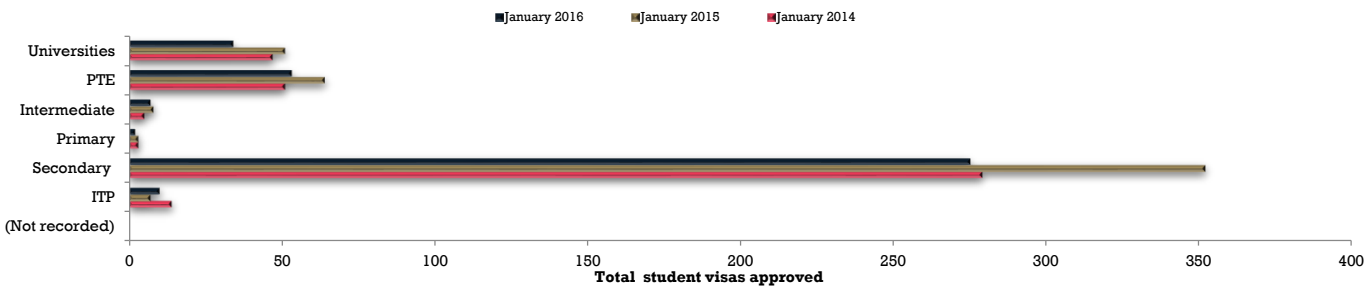
Thailand: student visas 2014-2016



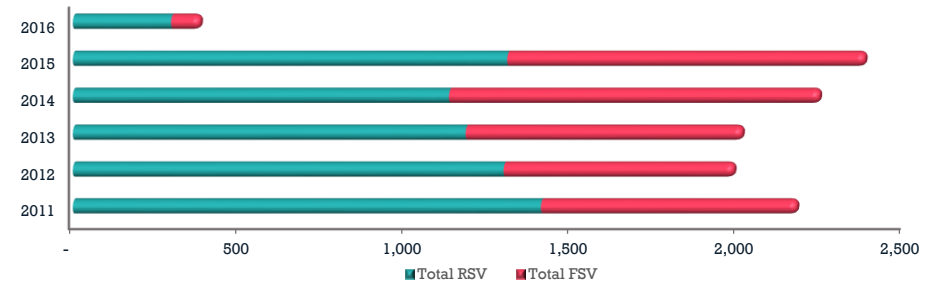
YTD TSV regional change



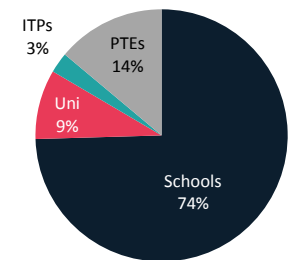
Thailand: Total student visas issued by sector, January



Thailand: Cumulative total for RSV vs. FSV, 2011-2016



YTD 2016 Sector breakdown of TSVs



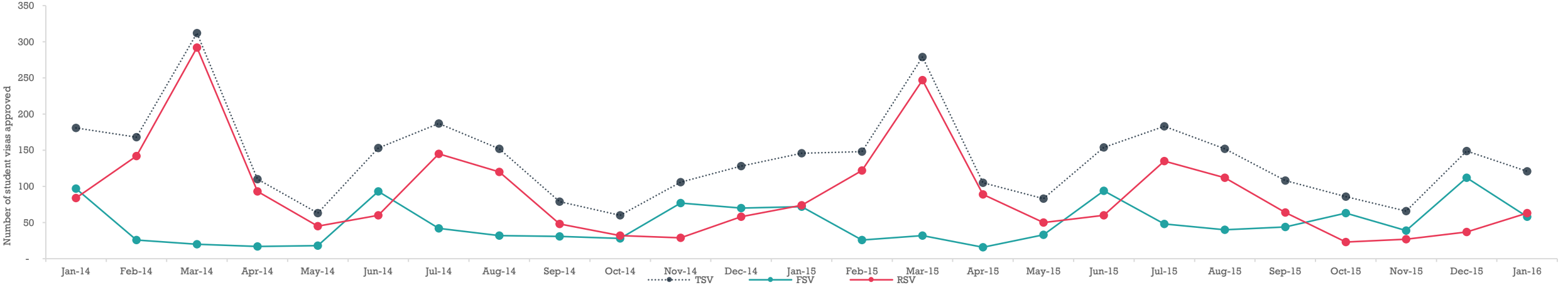
Key takeaways:

- Thailand experienced negative result in January with TSVs down 26% (-104) and RSVs down -26% (-101) while FSVs were flat, down 3% (-3).
- The schools sector made up 74% of TSVs approved YTD followed by the PTE sector with 14%.

YTD RSV	YTD FSV	YTD TSV
↓ -11	↓ -15%	↓ -25
-15%	-19%	-17%

Viet Nam:

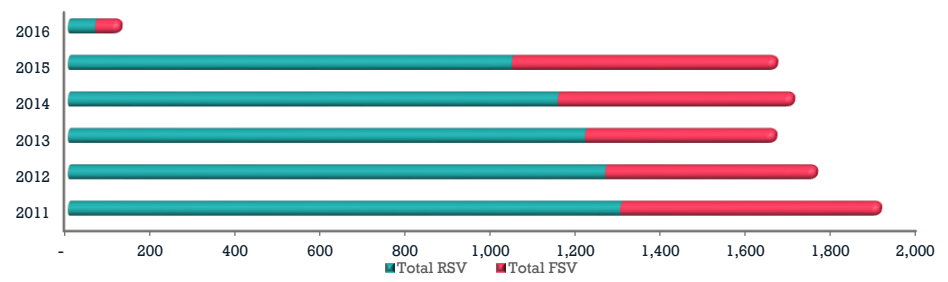
Viet Nam: student visas 2014-2016



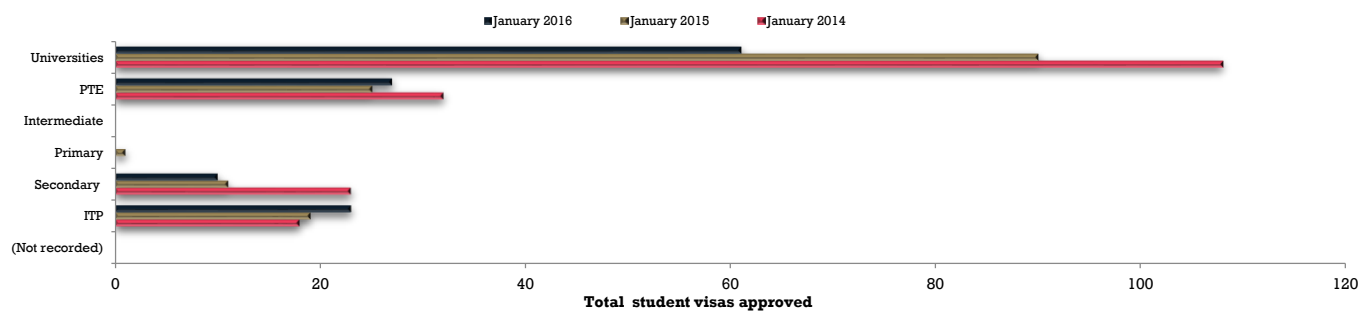
YTD TSV regional change



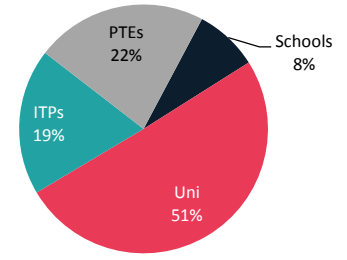
Viet Nam: Cumulative total for RSV vs. FSV, 2011-2016



Viet Nam: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs



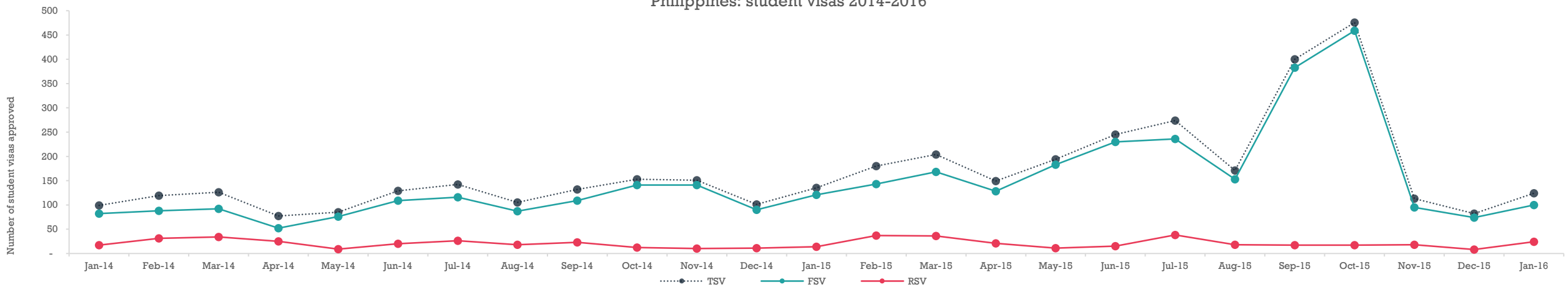
Key takeaways:

- Viet Nam results for January were negative, with TSVs down -17% (-25) and FSVs down 19% (-14).
- 51% of TSVs approved were in the university sector and 22% in the PTE sector.

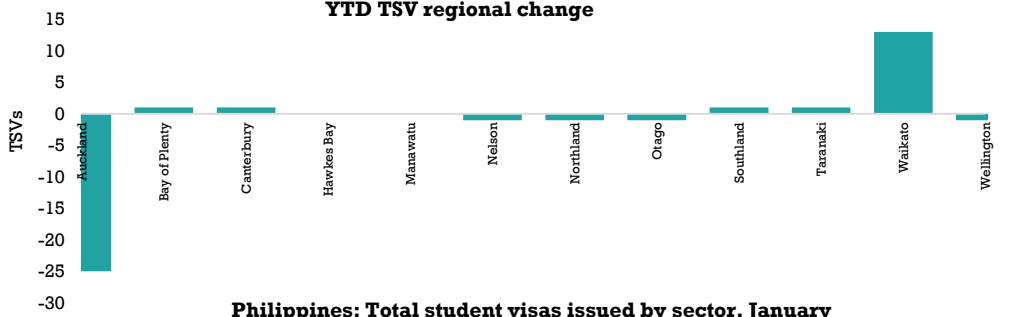
Philippines:

YTD RSV	YTD FSV	YTD TSV
↑ 10 71%	↓ -21 -17%	↓ -11 -8%

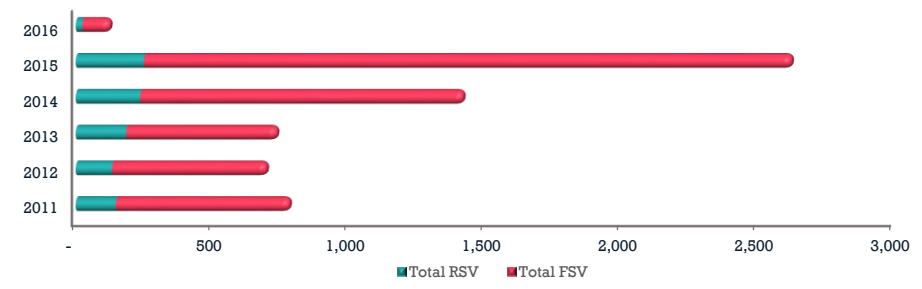
Philippines: student visas 2014-2016



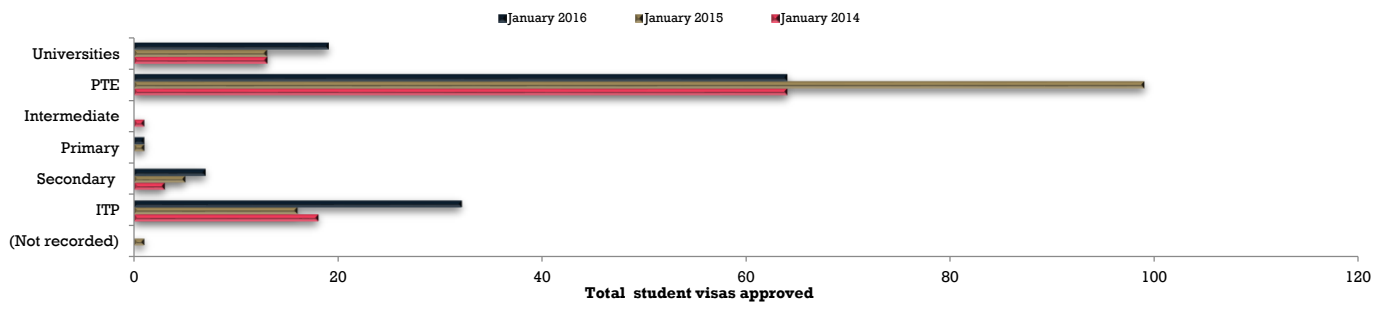
YTD TSV regional change



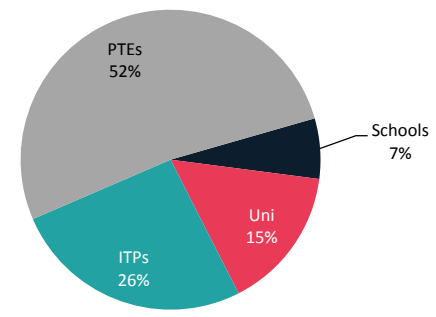
Overall: Cumulative total for RSV vs. FSV, 2011-2016



Philippines: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs



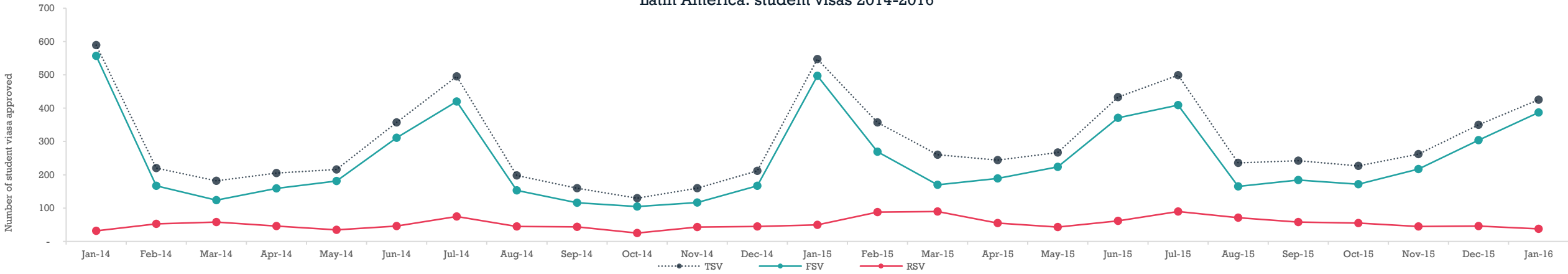
Key takeaways:

- TSV approved from the Philippines were down 8% (-11) and FSV down 17% (-21) for January 2016.
- 52% of TSV approved were in the PTE sector while 26% were in the ITP sector.

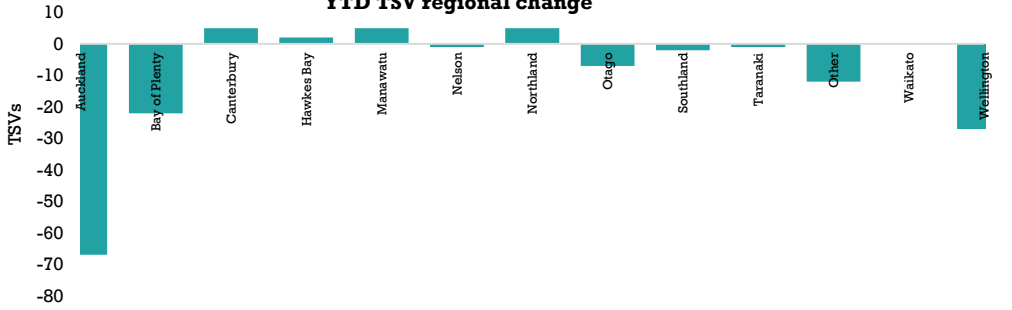
Latin America:

YTD RSV		YTD FSV		YTD TSV	
↓	-12	↓	-24%	↓	-110
					-22%
					-122
					-21%

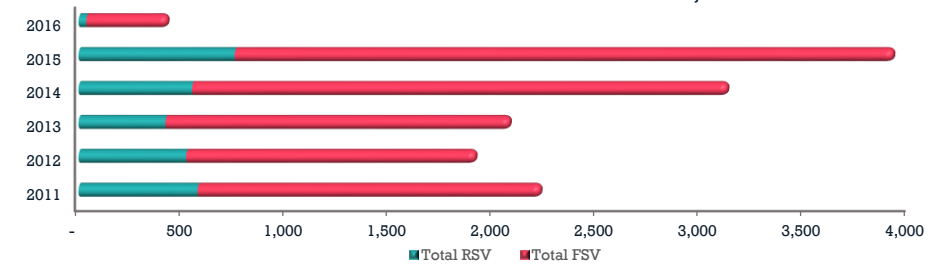
Latin America: student visas 2014-2016



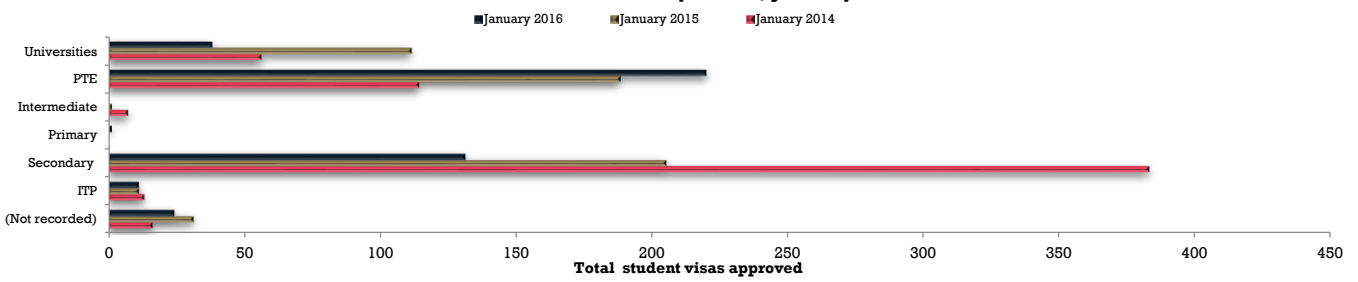
YTD TSV regional change



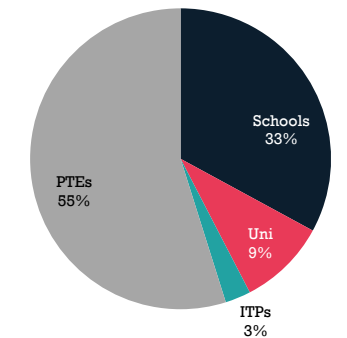
Latin America: Cumulative total for RSV vs. FSV, 2011-2016



Latin America: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs

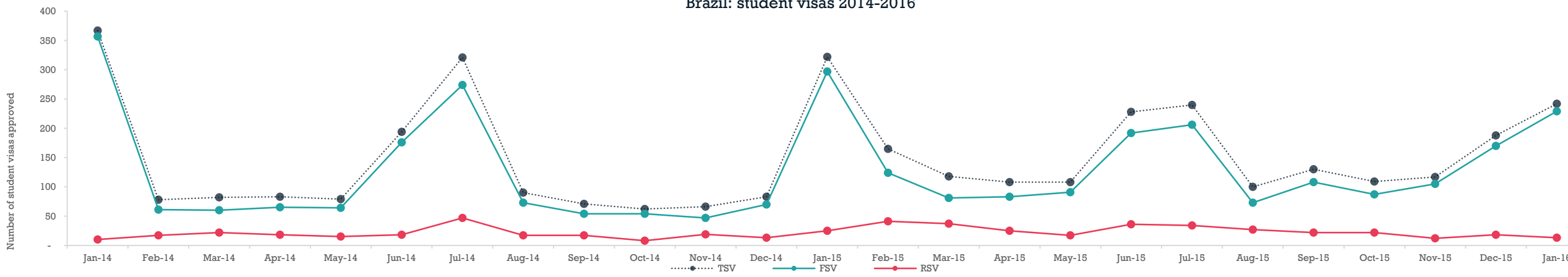


Key takeaways:

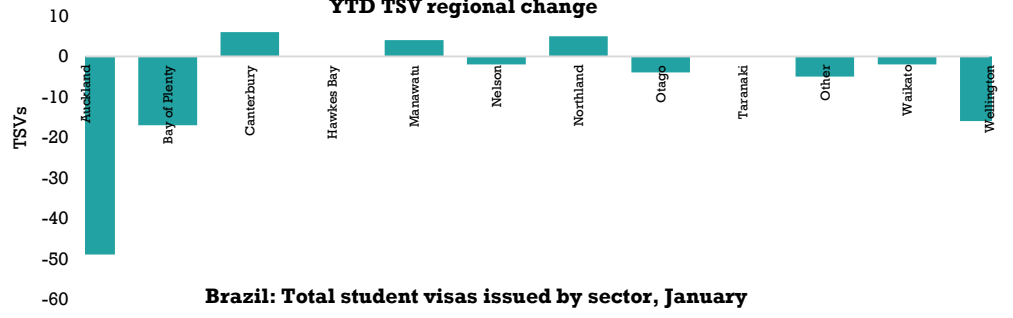
- Latin America experienced a decline in TSV -21% (-122) and down 22% (-110) in FSV for January.
- The decline was driven by a reduction of scholarship students who arrived in January 2015.
- The PTE sector accounts for the majority of TSV approved, 55%, followed by the school sector with 33%.

YTD RSV	YTD FSV	YTD TSV
↓ -12	↓ -48%	↓ -80
	-23%	-25%

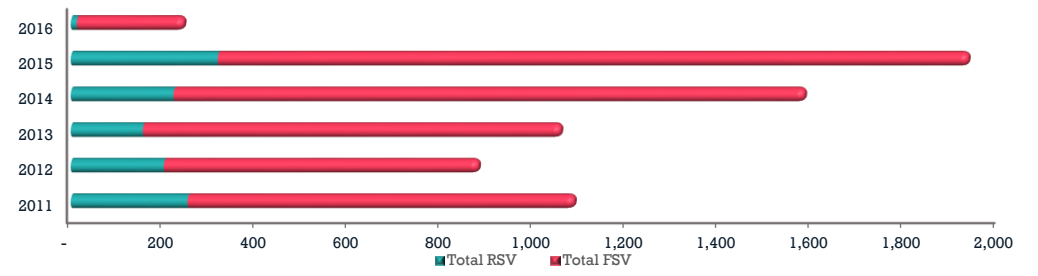
Brazil: student visas 2014-2016



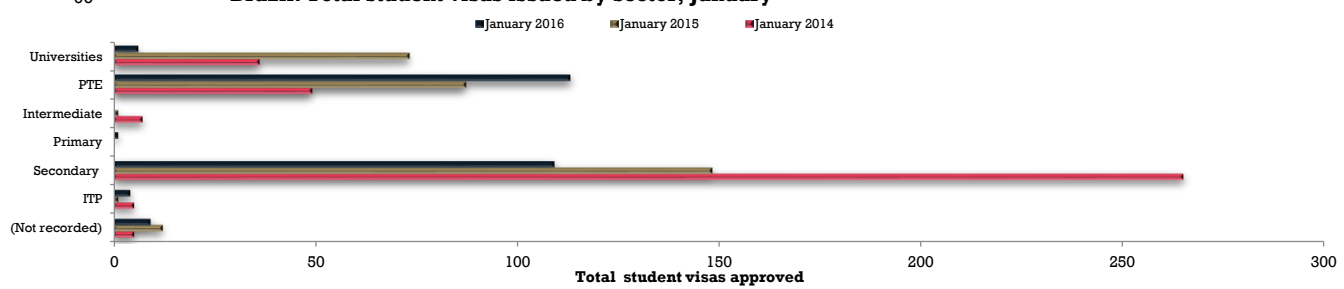
YTD TSV regional change



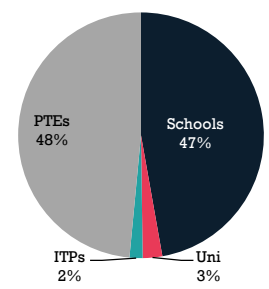
Brazil: Cumulative total for RSV vs. FSV, 2011-2016



Brazil: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs

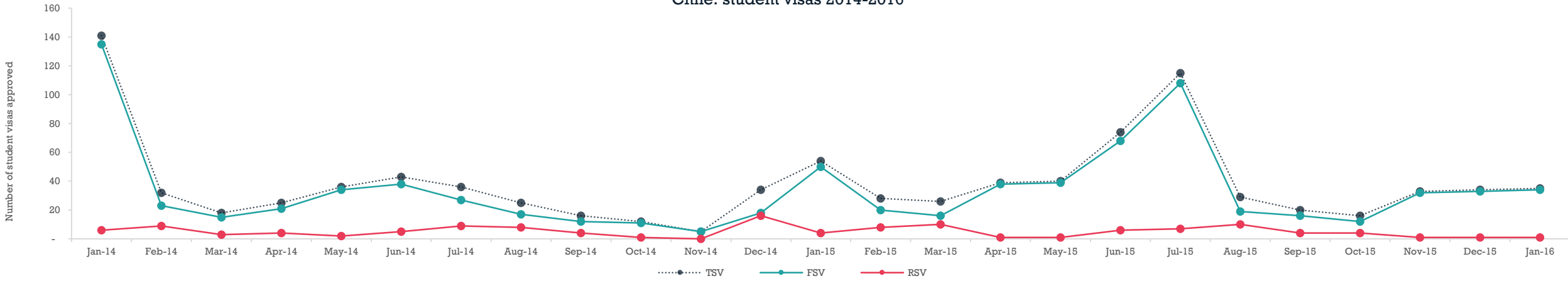


Key takeaways :

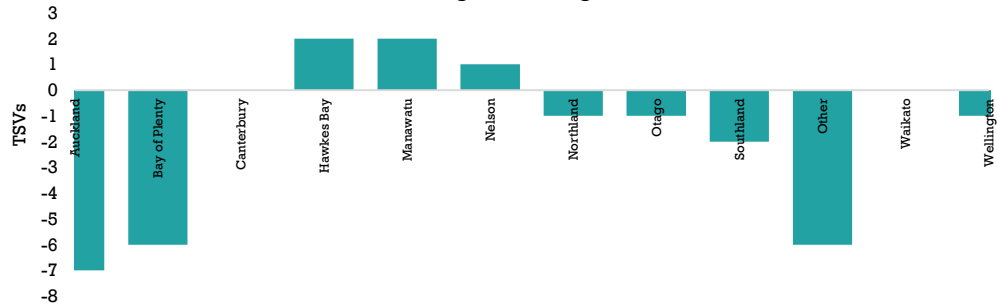
- Brazil result were negative for January, with TSVs down 25% (-80) and FSVs down 23% (-68)..
- 48% of TSV approved were in the PTE sector followed by the schools sector with 47%.

YTD RSV	YTD FSV	YTD TSV
↓ -3	↓ -16	↓ -19
-75%	-32%	-35%

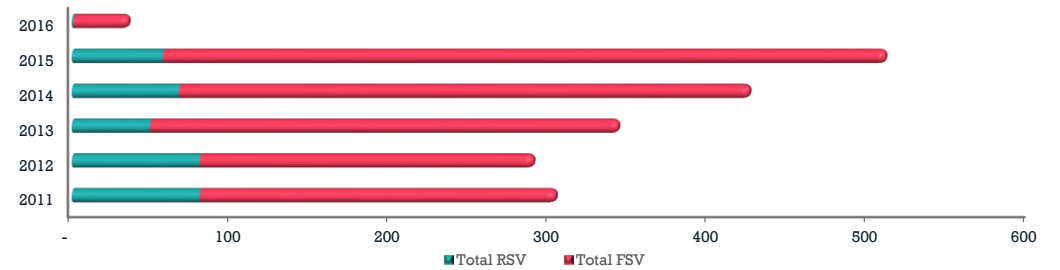
Chile: student visas 2014-2016



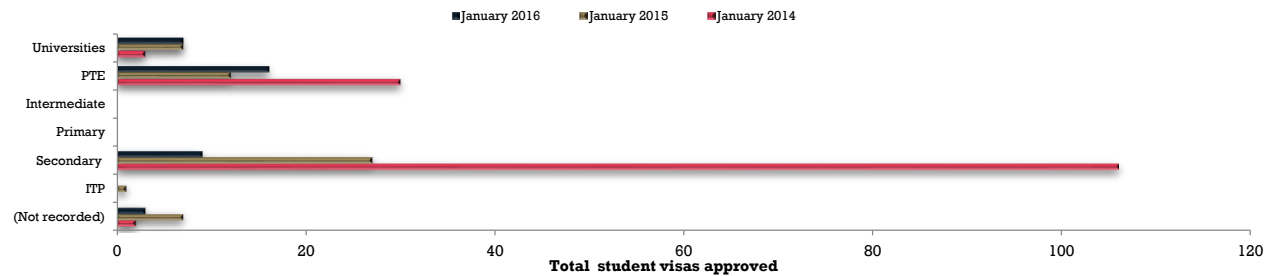
YTD TSV regional change



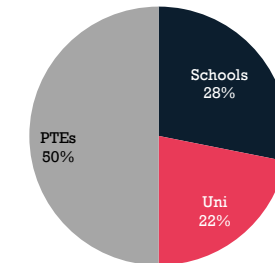
Chile: Cumulative total for RSV vs. FSV, 2011-2016



Chile: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs

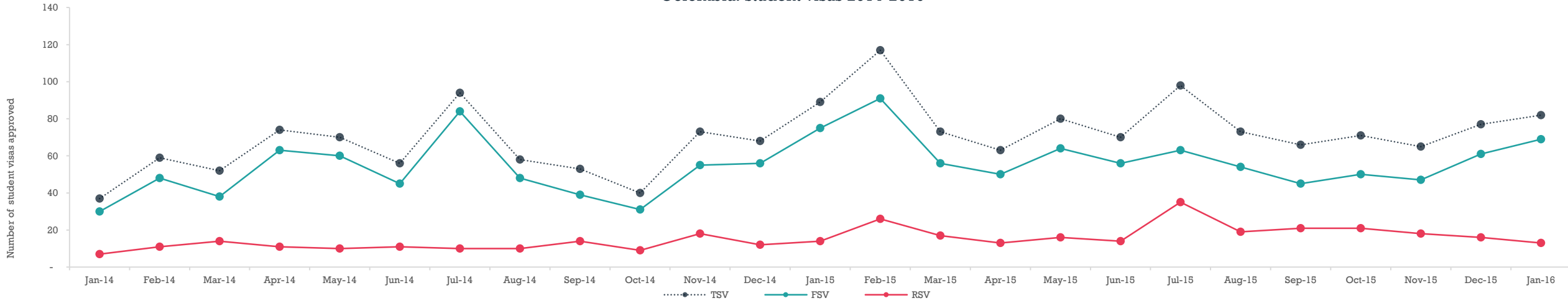


Key takeaways:

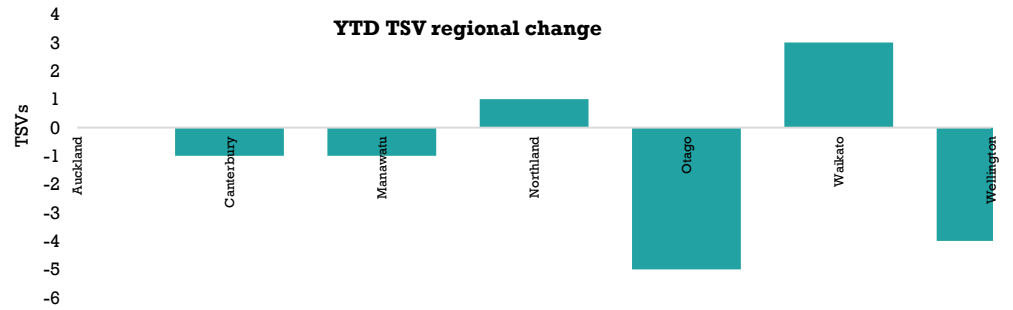
- January results for Chile were down with TSVs -35% (-19) and FSVs down -32% (-16).
- 50% of TSVs approved were in the PTE sector with the school sector contributing 28%.

YTD RSV	YTD FSV	YTD TSV
↓ -1 -7%	↓ -6 -8%	↓ -7 -8%

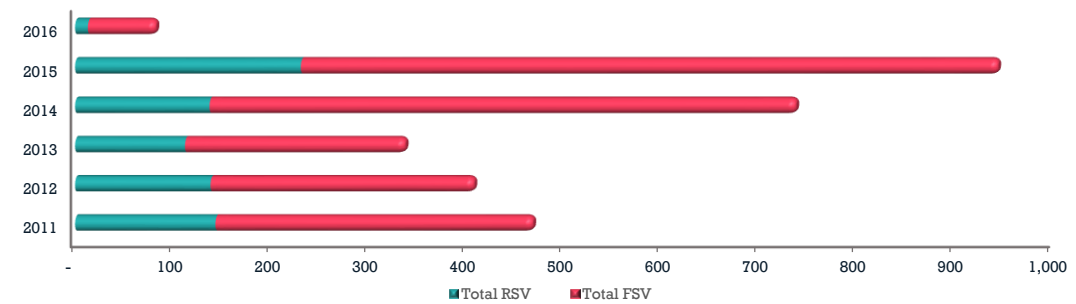
Colombia: student visas 2014-2016



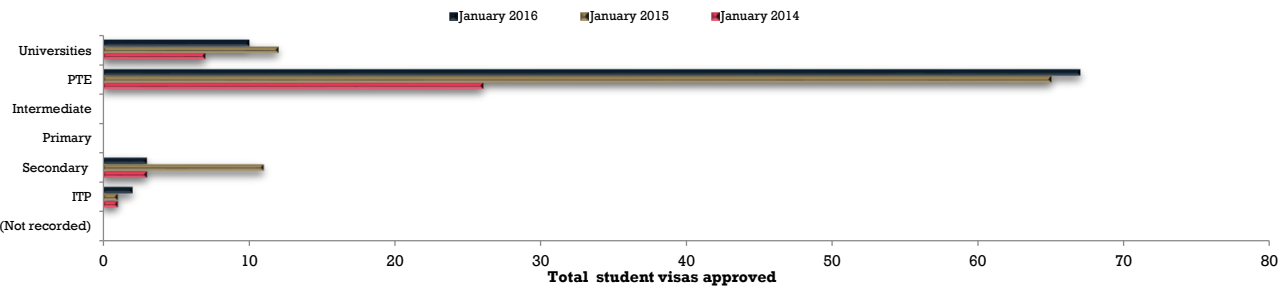
YTD TSV regional change



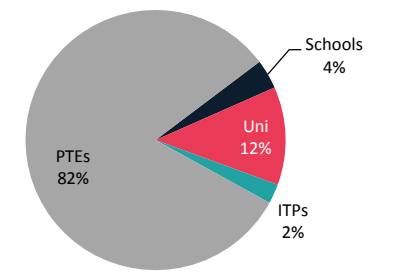
Colombia: Cumulative total for RSV vs. FSV, 2011-2016



Colombia: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs

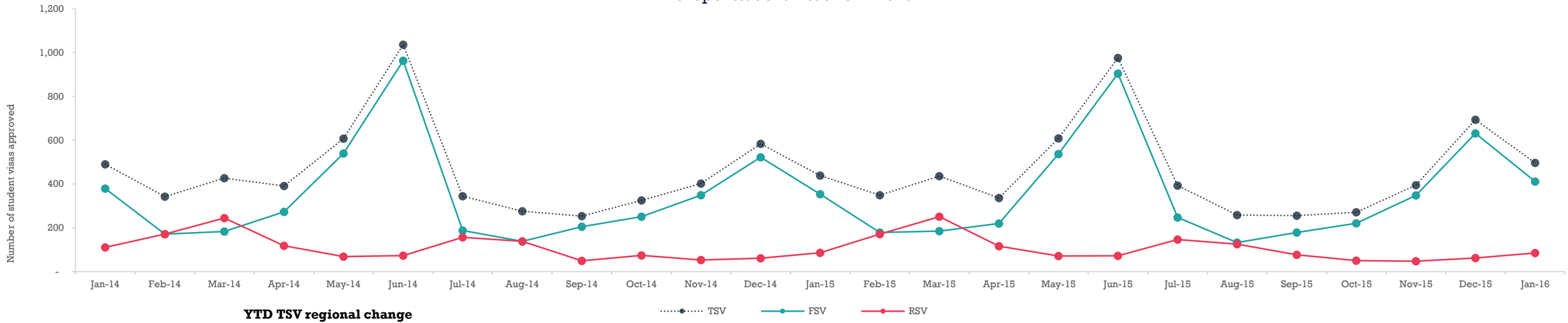


Key takeaways:

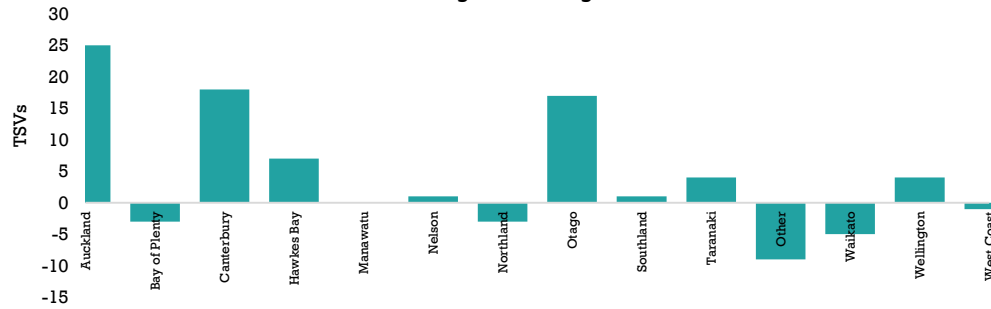
- For January results for Colombia were down, TSVs -8% (-7) and FSVs down 8% (-6).
- The PTE sector dominates this market with 82% of TSVs approved in January.

YTD RSV	YTD FSV	YTD TSV
➔ -1 -1%	⬆ 58 16%	⬆ 57 12%

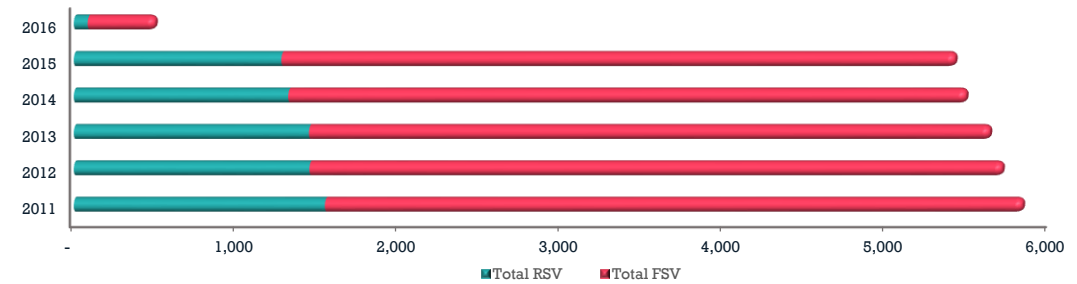
Europe: student visas 2014-2016



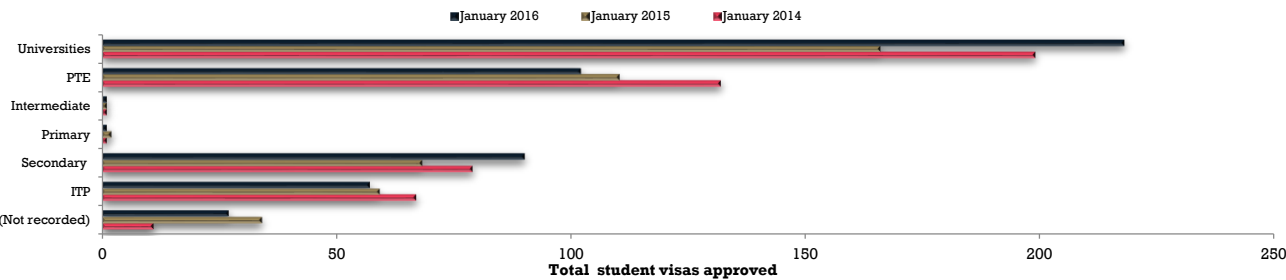
YTD TSV regional change



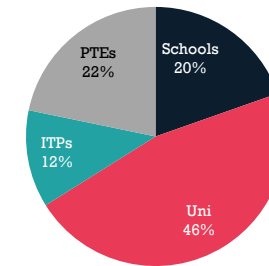
Europe: Cumulative total for RSV vs. FSV, 2011-2016



Europe: Total student visas issued by sector, January



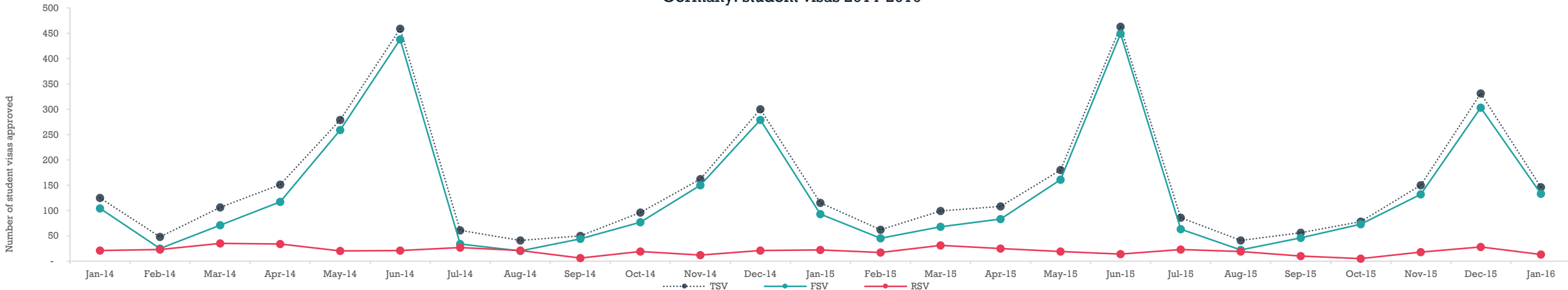
YTD 2016 Sector breakdown of TSVs



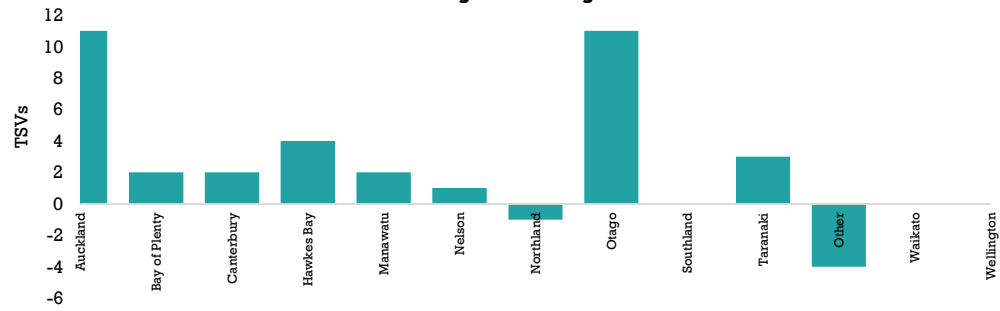
Key takeaways:

- Europe experienced strong growth in January, up 12% (57) in TSVs.
- The growth was driven by the universities and secondary school sector.

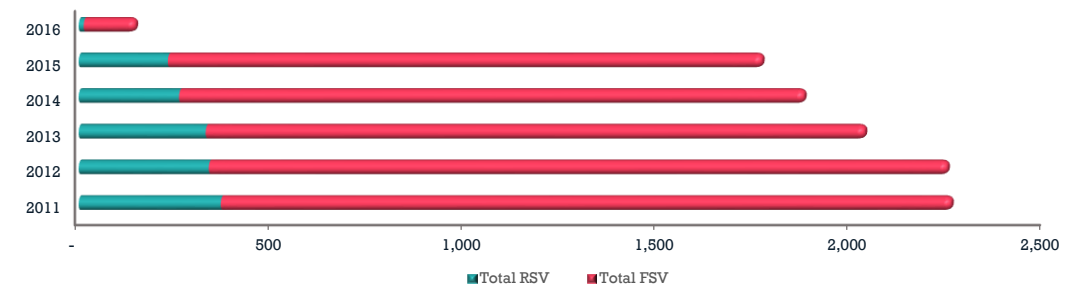
Germany: student visas 2014-2016



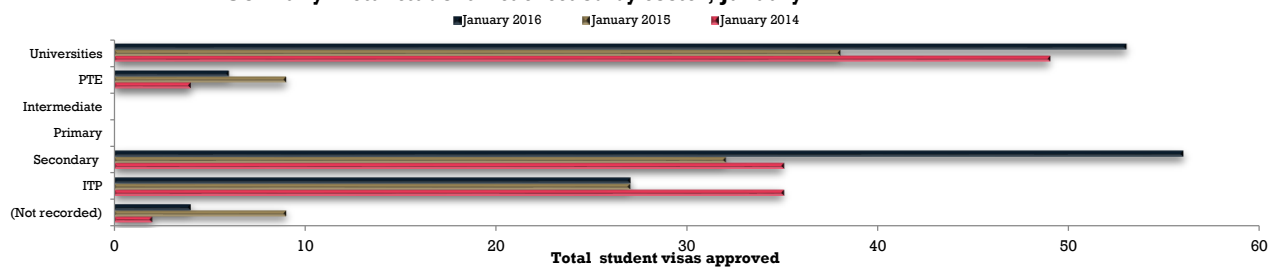
YTD TSV regional change



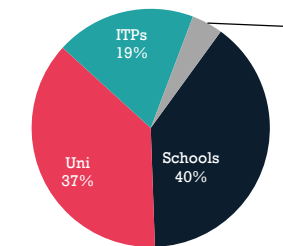
Germany: Cumulative total for RSV vs. FSV, 2011-2016



Germany: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs



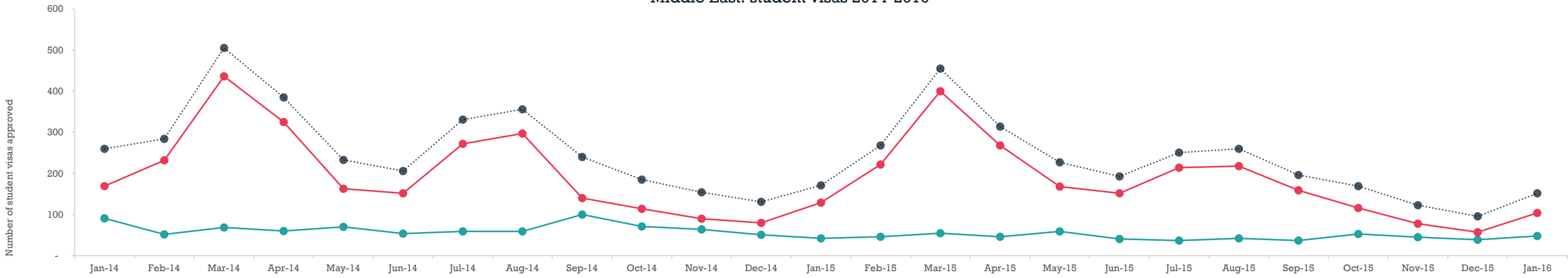
Key takeaways:

- Germany saw strong growth in January, up 43% (40) in FSVs. Declines in RSVs offset the overall TSV result.
- The Otago and Auckland regions saw the biggest growth.

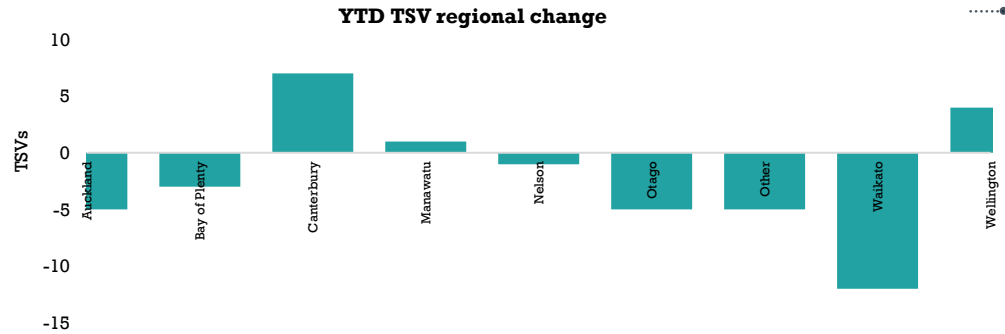
Middle East:

YTD RSV		YTD FSV		YTD TSV	
↓	-25	-19%	↑	6	14%
↓	-19	-7%			

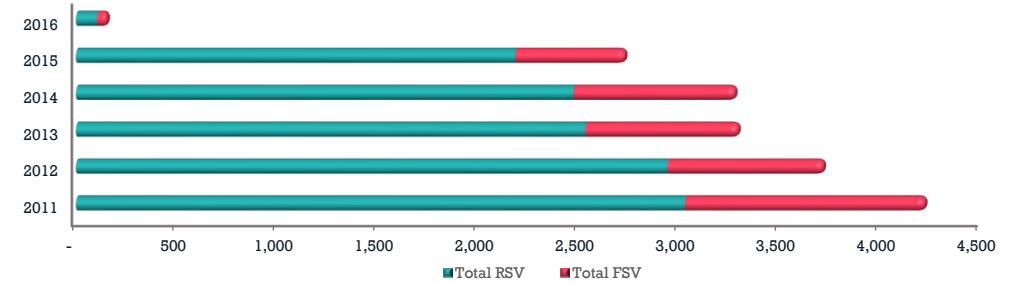
Middle East: student visas 2014-2016



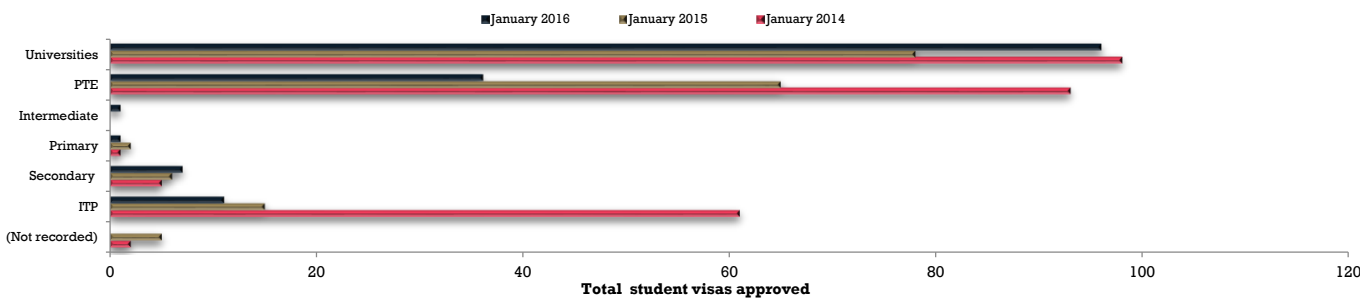
YTD TSV regional change



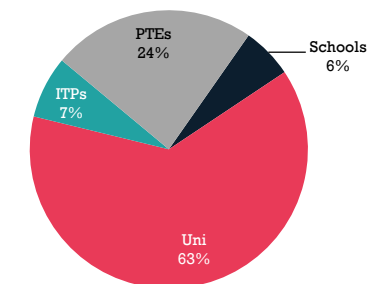
Middle East: Cumulative total for RSV vs. FSV, 2011-2016



Middle East: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs



Key takeaways:

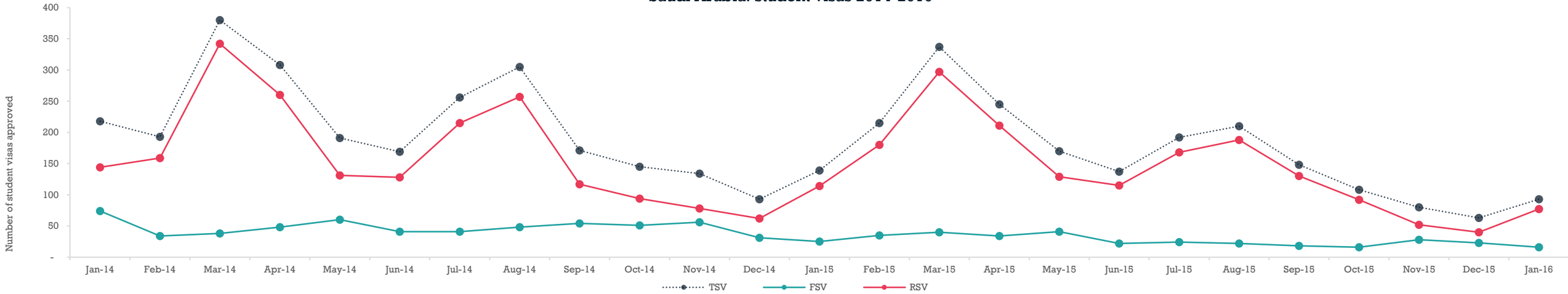
- The Middle East experienced mixed results in January, with TSV down 7% (-19) and FSVs up 14% (6).
- The university sector accounts for 63% of TSV approved followed by the PTE sector with 24%.

Saudi Arabia:

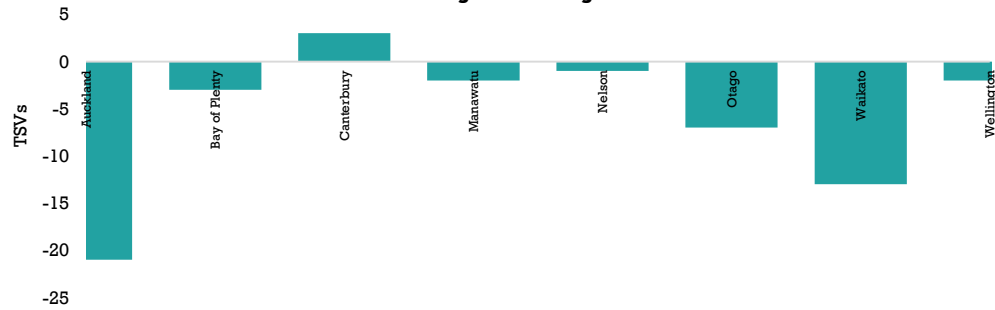
YTD RSV		YTD FSV		YTD TSV	
↓	-37	↓	-9	↓	-46
	-32%		-36%		-33%

YTD (January)

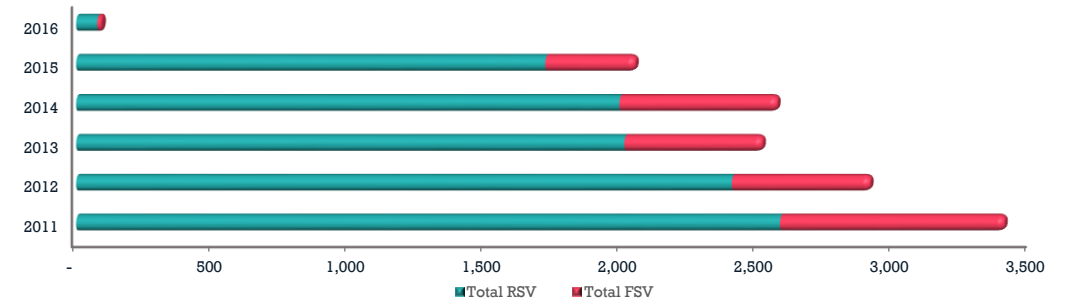
Saudi Arabia: student visas 2014-2016



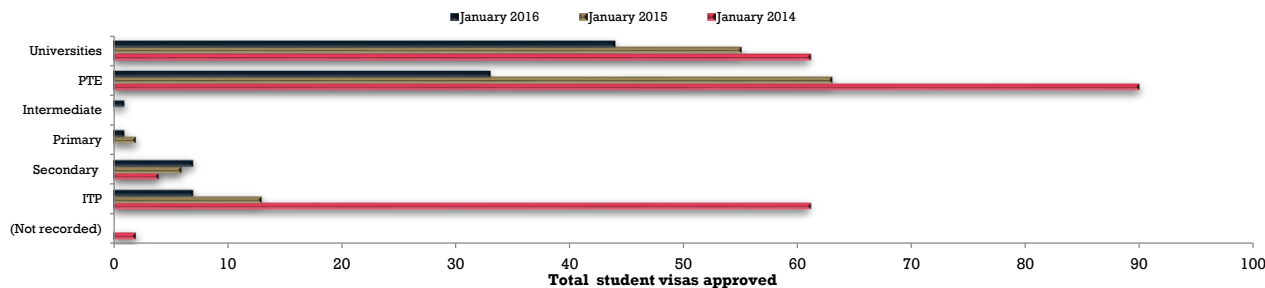
YTD TSV regional change



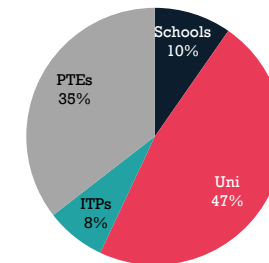
Saudi Arabia: Cumulative total for RSV vs. FSV, 2011-2016



Saudi Arabia: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs



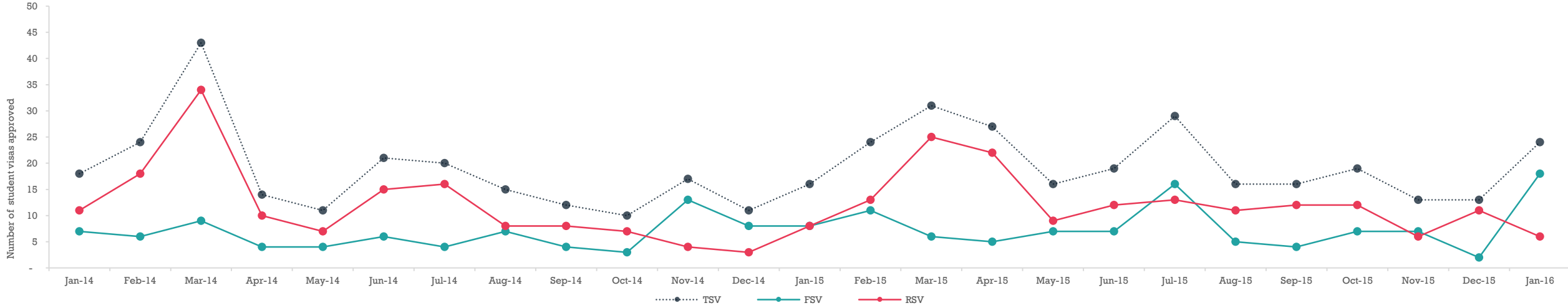
Key takeaways:

- Saudi Arabia saw negative results in January, TSVs were down 33% (-46) and FSVs down 36% (-9).
- 47% of TSV approved were in the university sector with 35% in the PTE sector,

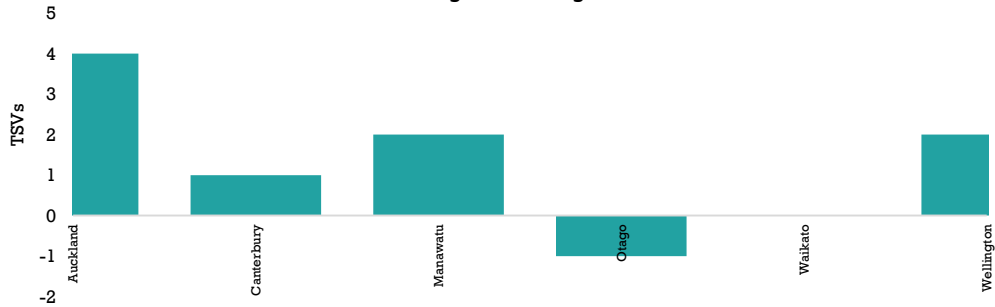
Pakistan:

YTD RSV	YTD FSV	YTD TSV
↓ -2 -25%	↑ 10 125%	↑ 8 50%

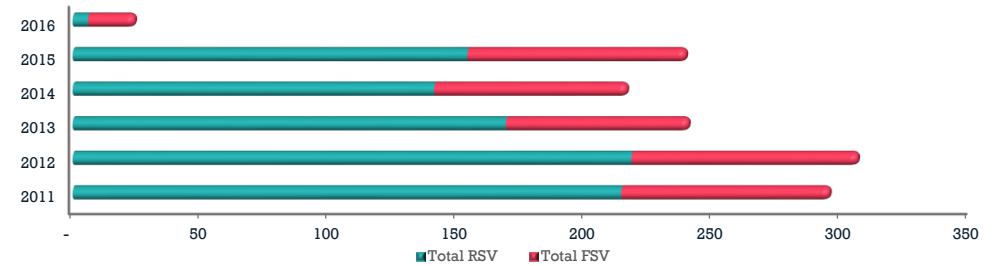
Pakistan: student visas 2014-2016



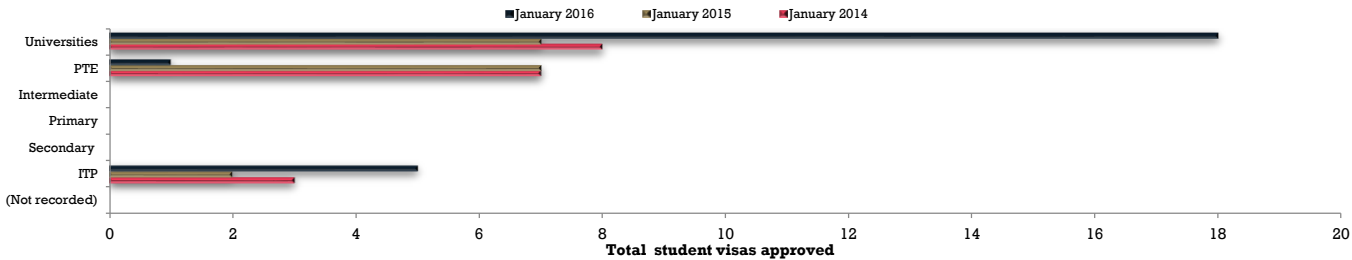
YTD TSV regional change



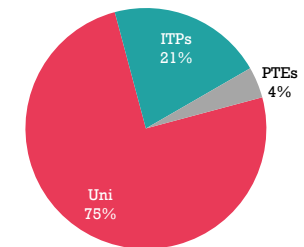
Pakistan: Cumulative total for RSV vs. FSV, 2011-2016



Pakistan: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs

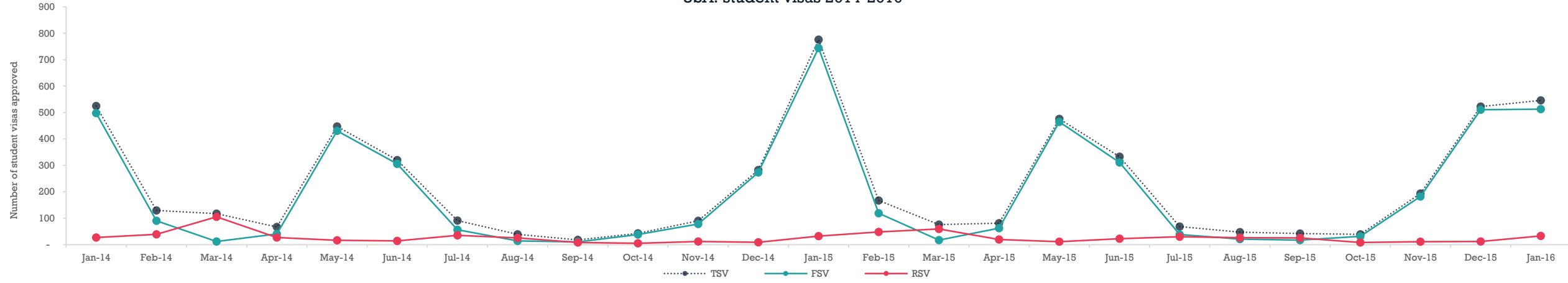


Key takeaways:

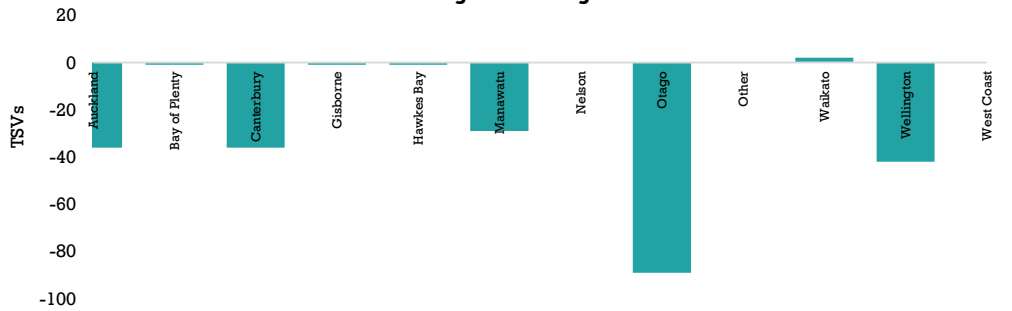
- Pakistan saw good results in January with TSVs up 50% (8) and FSVs up 125% (10).
- This market is driven by the university sector with 75% of TSV approved in January.

YTD RSV		YTD FSV		YTD TSV	
➔	1	3%	↓	-231	-31%
			↓	-230	-30%

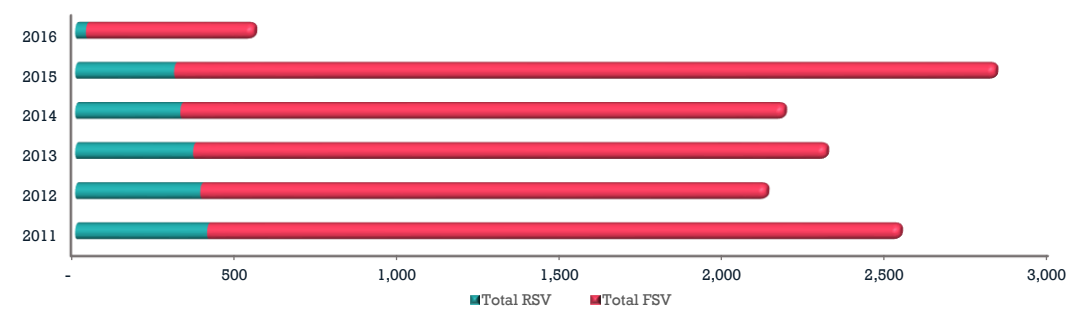
USA: student visas 2014-2016



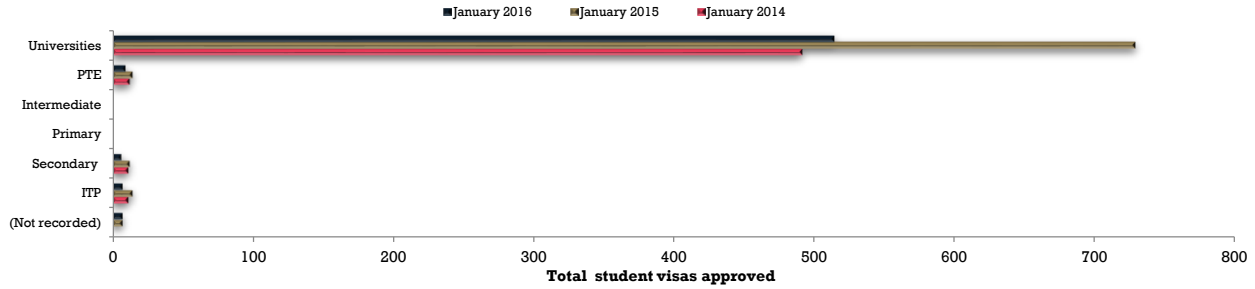
YTD TSV regional change



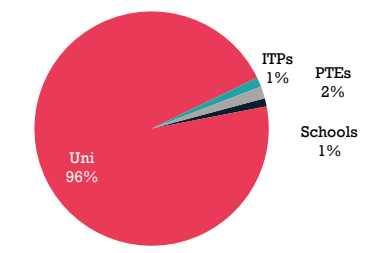
USA: Cumulative total for RSV vs. FSV, 2011-2016



USA: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs

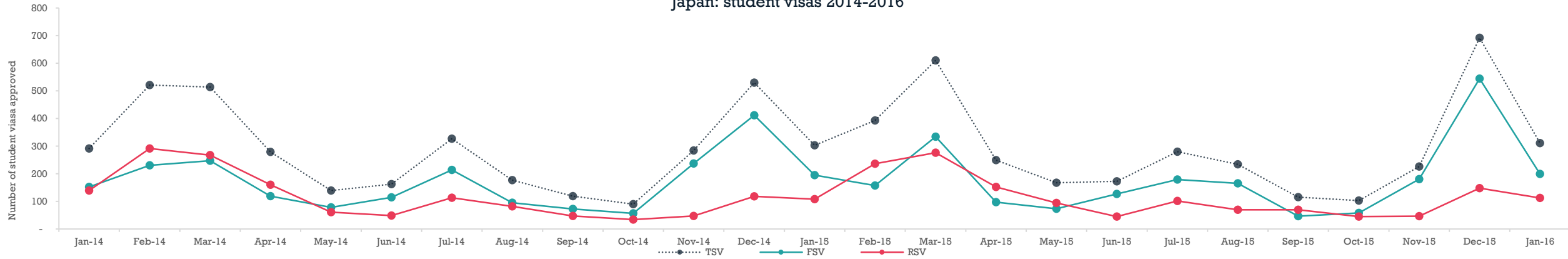


Key takeaways:

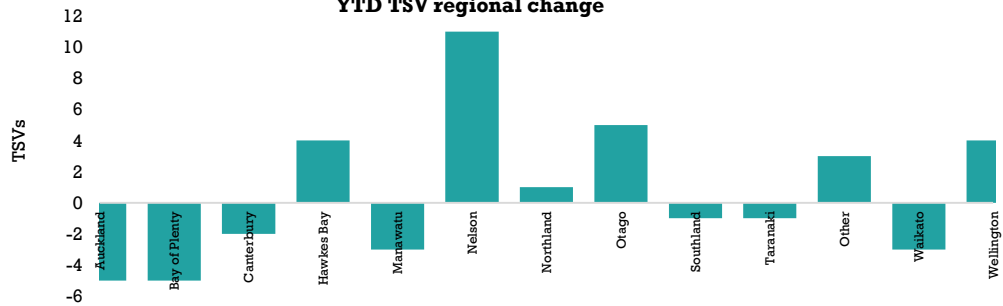
- Results from the USA were down for January with TSV down -30% (-230) and FSVs down 31% (-231).
- 96% of TSV approved in January were in the university sector.

YTD RSV	YTD FSV	YTD TSV
➔ 4 4%	➔ 4 2%	➔ 8 3%

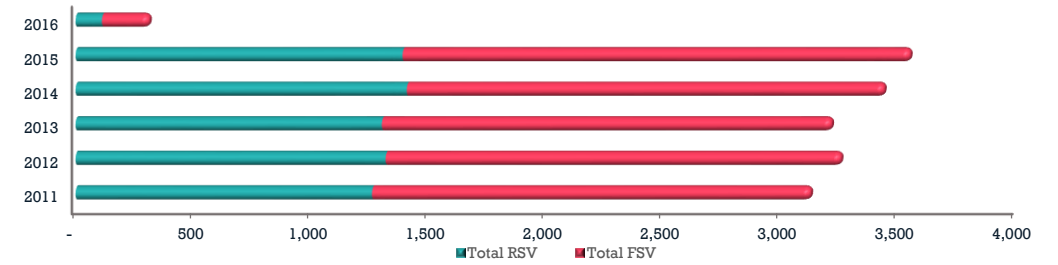
Japan: student visas 2014-2016



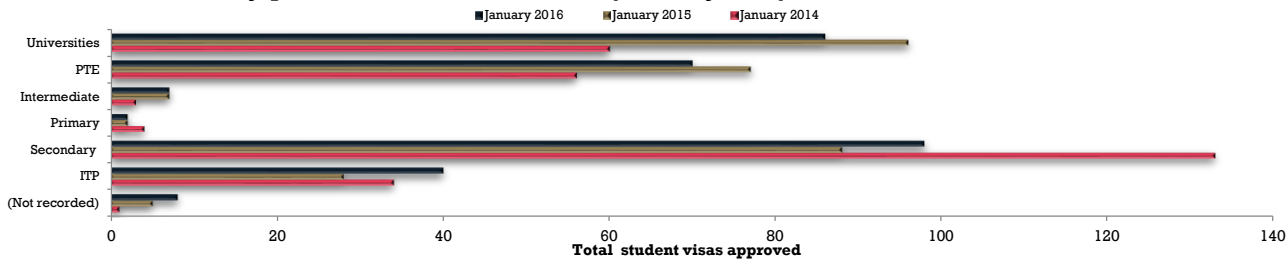
YTD TSV regional change



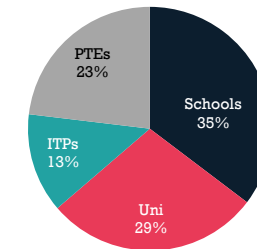
Japan: Cumulative total for RSV vs. FSV, 2011-2016



Japan: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs

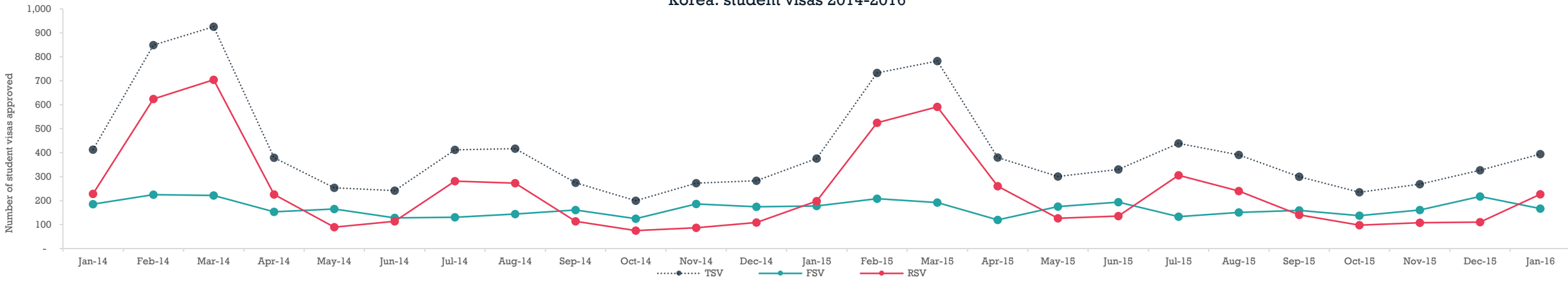


Key takeaways:

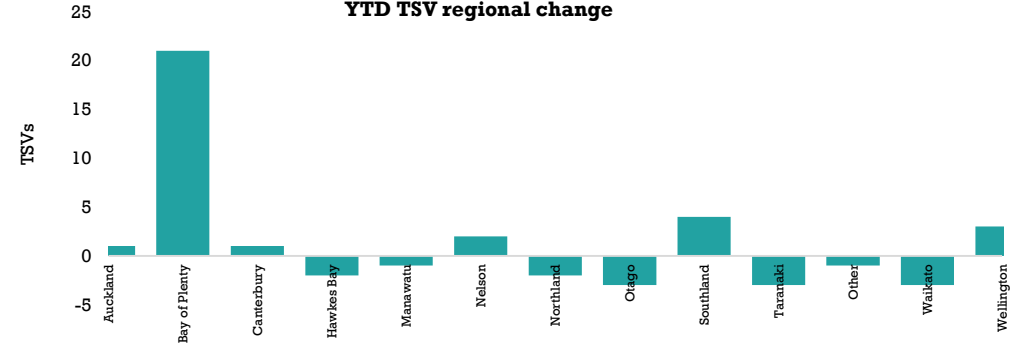
- Japan results for January were flat, TSVs up 3% (8) and FSVs up 2% (4).
- For January schools made up 35% of TSV approved, with 29% in the university sector and 23% in the PTE sector.

YTD RSV		YTD FSV		YTD TSV	
↑	29	15%	↓	-11	-6%
↑	18	5%			

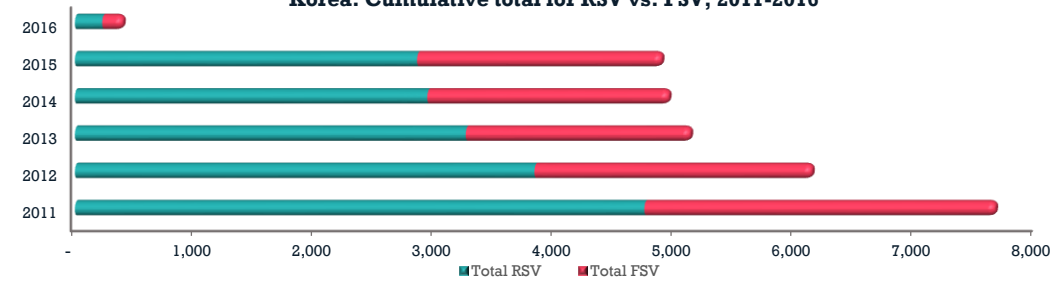
Korea: student visas 2014-2016



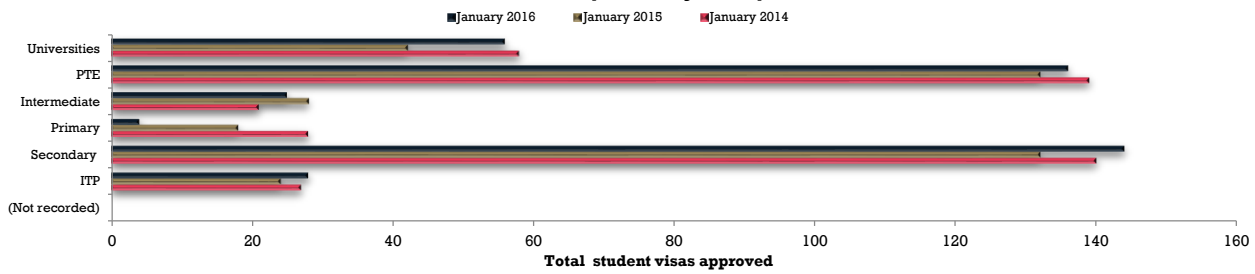
YTD TSV regional change



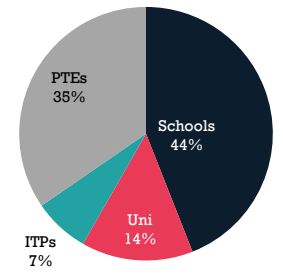
Korea: Cumulative total for RSV vs. FSV, 2011-2016



Korea: Total student visas issued by sector, January



YTD 2016 Sector breakdown of TSVs



Key takeaways:

- Korea results for January were mixed with TSVs up 5% (18) and FSVs down 6% (-11).
- Schools sector made up 44% of TSV approved and PTEs 35%.

Trends by sector

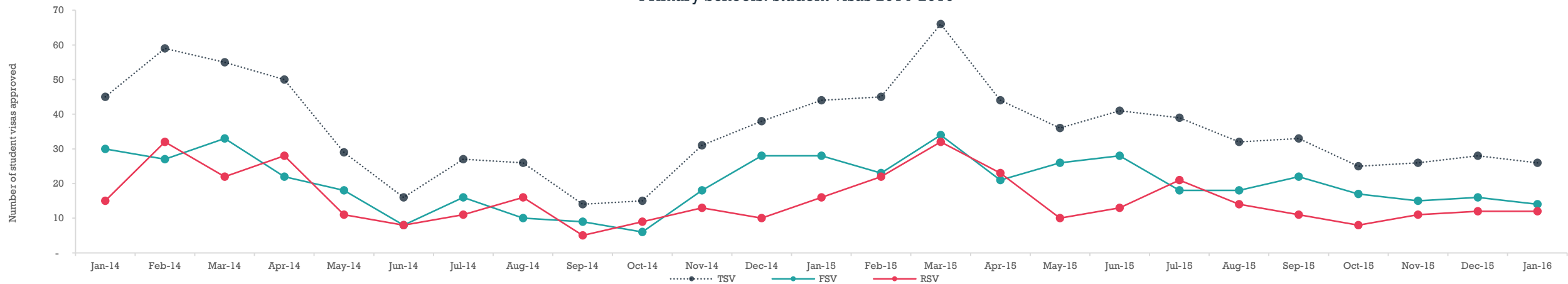


Primary Schools:

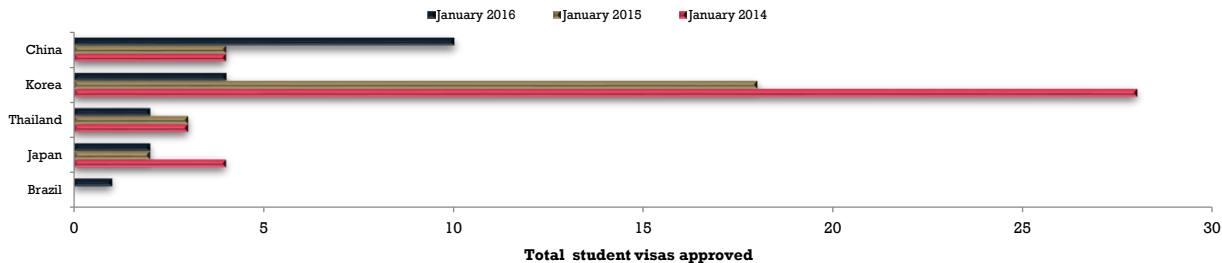


YTD RSV		YTD FSV		YTD TSV	
↓	-4	-25%	↓	-14	-50%
↓	-18	-41%			

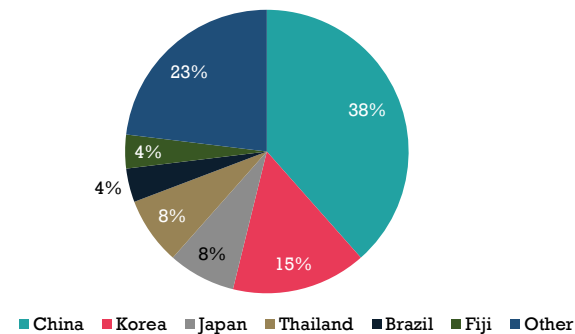
Primary Schools: student visas 2014-2016



Primary Schools: Total student visas issued by country, January



YTD 2016 country breakdown of TSVs



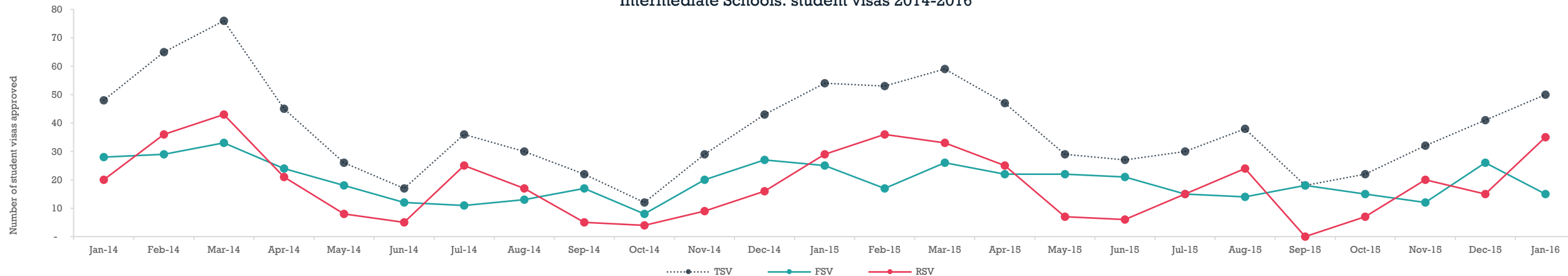
Key takeaways:

- The primary schools sector saw a negative result in January, TSVs down 41% (-18) and FSVs down 50% (14) on January 2015.
- China account for 38% of TSV approved and Korea for 15% in January.

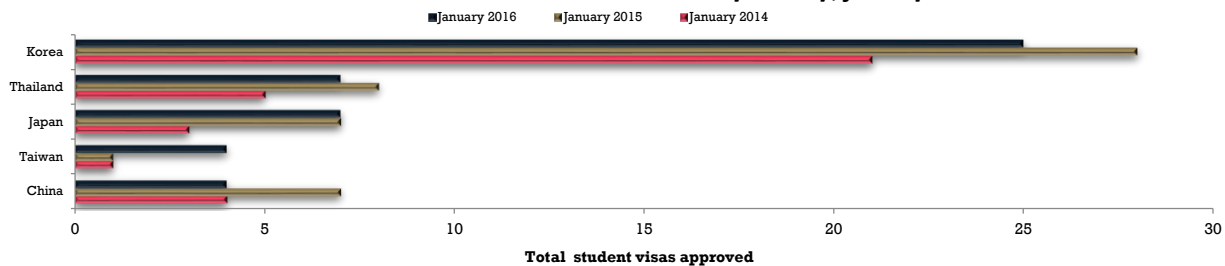
Intermediate Schools:

YTD RSV	YTD FSV	YTD TSV
↑ 6 21%	↓ -10 -40%	↓ -4 -7%

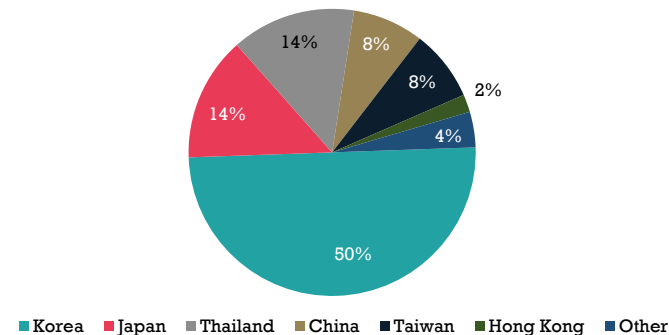
Intermediate Schools: student visas 2014-2016



Intermediate Schools: Total student visas issued by country, January



YTD 2016 country breakdown of TSVs



Key takeaways:

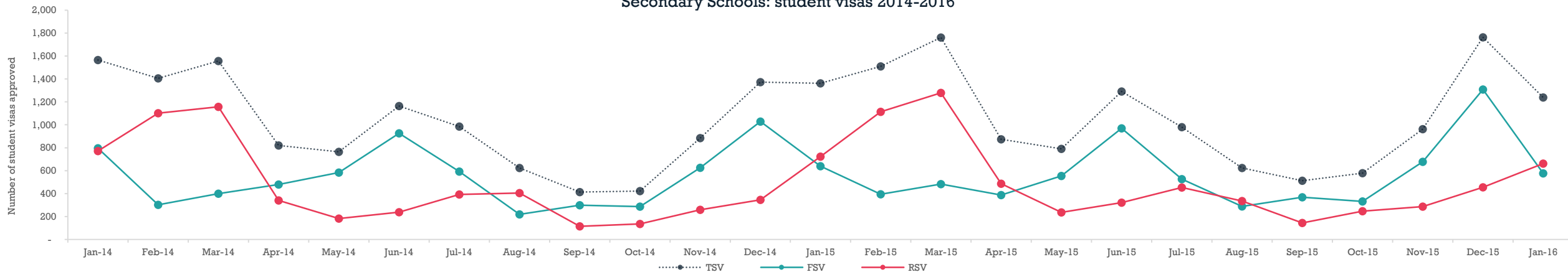
- The intermediate schools sector saw a 7% decline in TSVs and FSVs.
- Korea and Thailand drove the overall decline.

Secondary Schools:

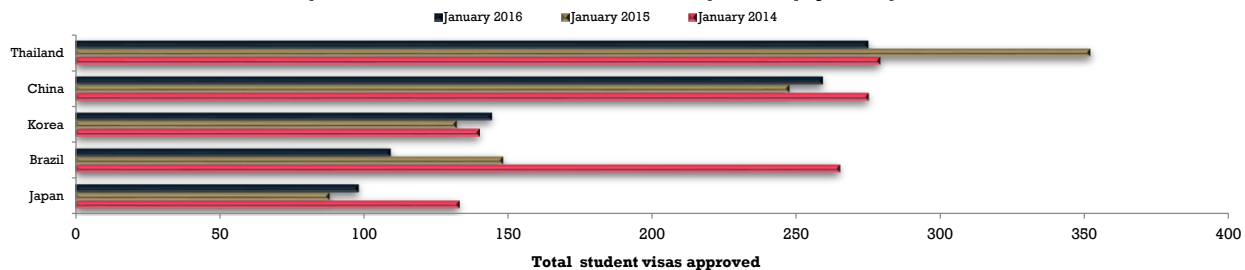


YTD RSV	YTD FSV	YTD TSV
↓ -61 -8%	↓ -62 -10%	↓ -123 -9%

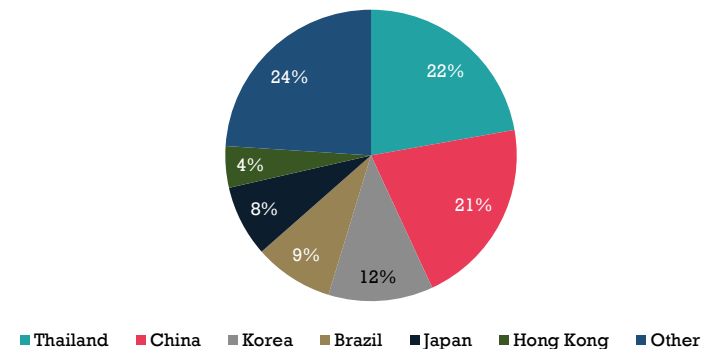
Secondary Schools: student visas 2014-2016



Secondary Schools: Total student visas issued by country, January



YTD 2016 country breakdown of TSVs



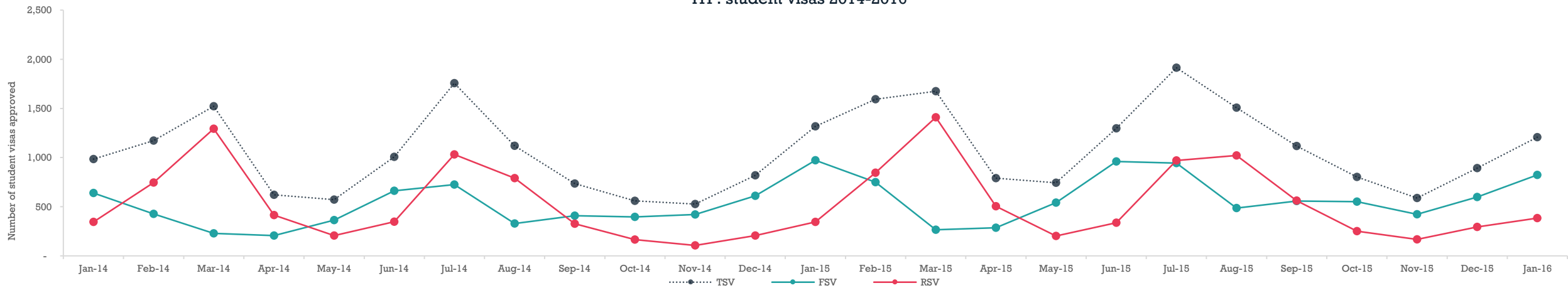
Key takeaways:

- The secondary schools market experienced a decline in TSVs 9% (-123) and FSVs down 10% (-10).
- Thailand accounted for 22% of TSV approved, China with 21% and Korea with 12%.

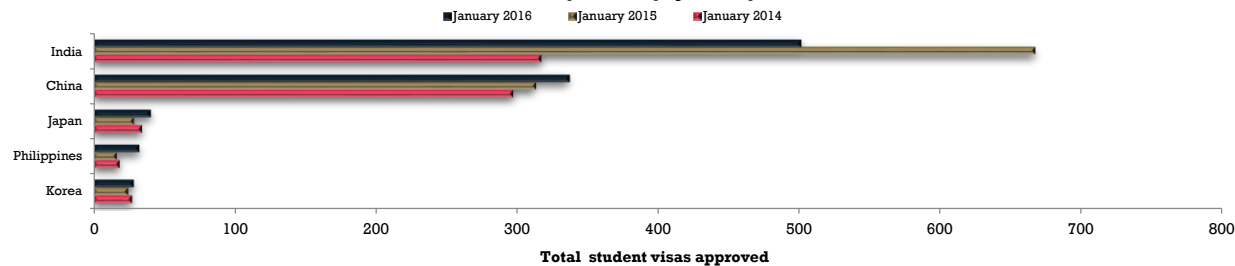
Institutes of Technology and Polytechnics (ITPs):

YTD RSV		YTD FSV		YTD TSV	
↑	39	11%	↓	-149	-15%
↓	-110	-8%			

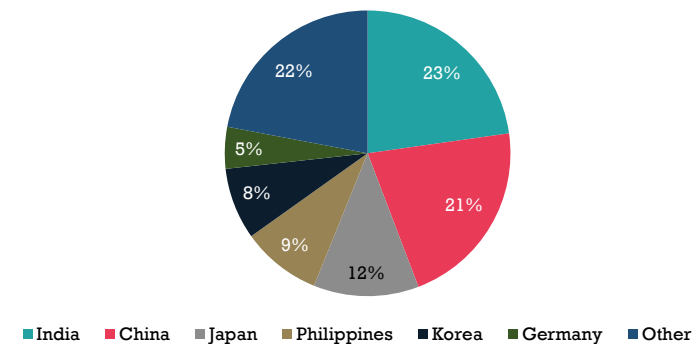
ITP: student visas 2014-2016



ITP: Total student visas issued by country, January



YTD 2016 country breakdown of TSVs

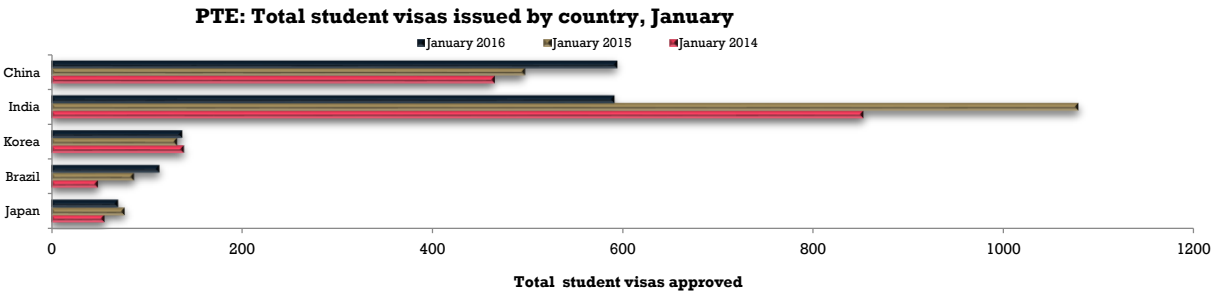
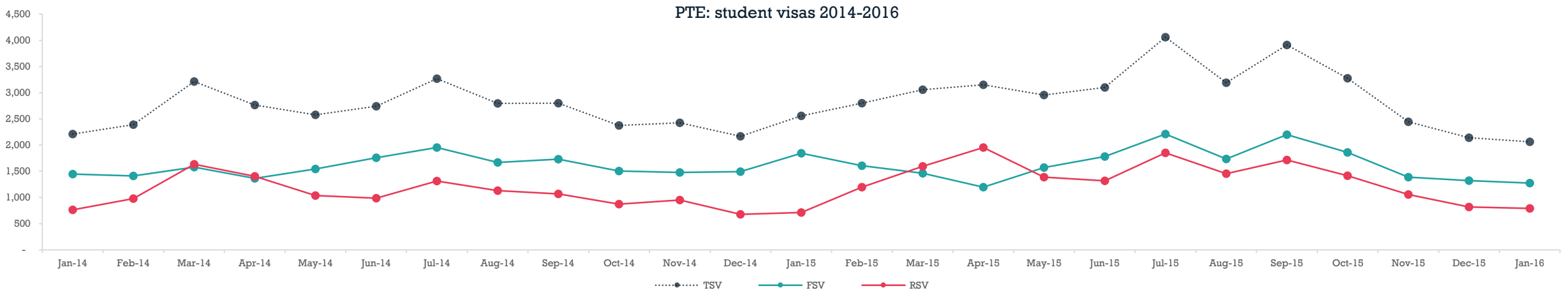


Key takeaways:

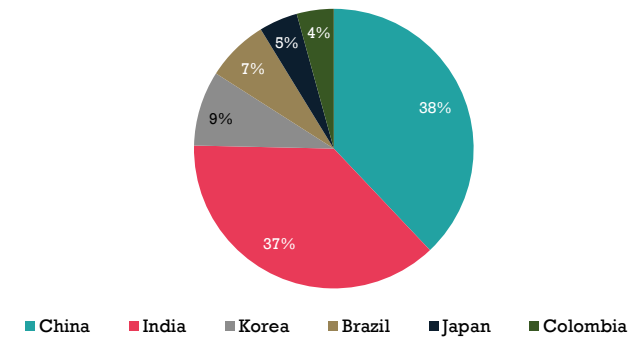
- Results for the ITP sector were down in January with TSVs down 8% (-110) and FSVs down 15% (-149).
- The decline in Indian students has rebalanced the ITP market portfolio and now accounts for 23% of TSV approved in January.

Private Training Establishments (PTEs):

YTD RSV		YTD FSV		YTD TSV	
↑	77	11%	↓	-571	-31%
				↓	-494
					-19%



YTD 2016 country breakdown of TSVs



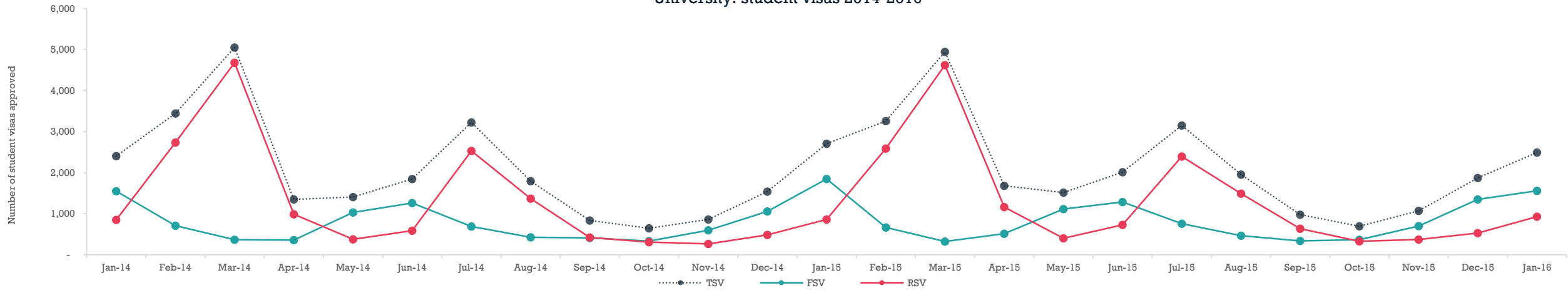
Key takeaways:

- TSVs for the PTE sector were down 19% (-494) and FSVs down 31% (-571) in January.
- China contributed 38% and India 37% of TSV approved in January.

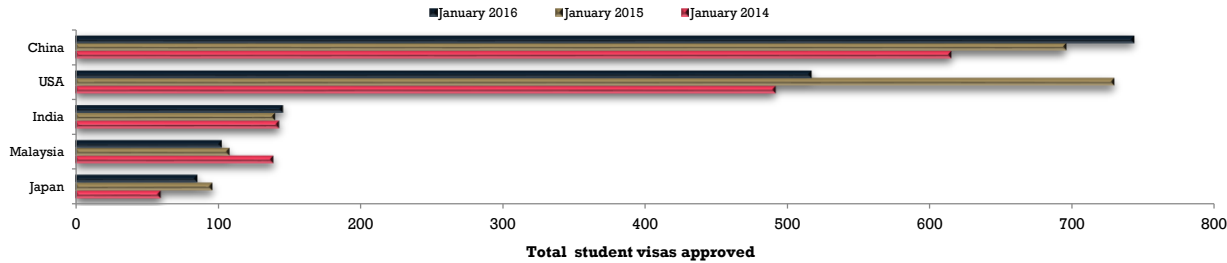


YTD RSV		YTD FSV		YTD TSV	
↑	71	8%	↓	-287	-16%
			↓	-216	-8%

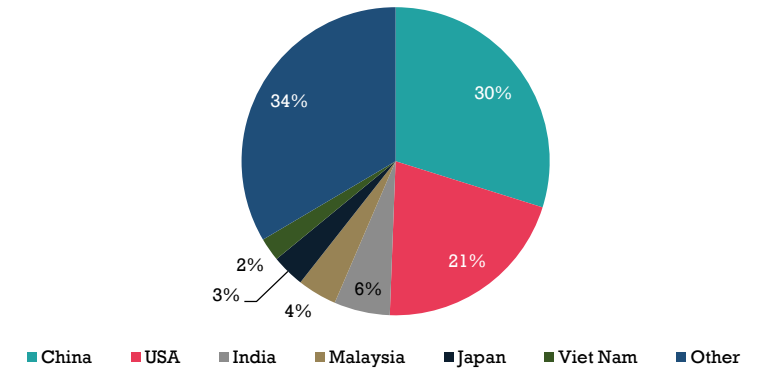
University: student visas 2014-2016



University: Total student visas issued by country, January



YTD 2016 country breakdown of TSVs



Key takeaways:

- The university sector experienced a 8% (-216) decline in TSV and a 16% (-287) decline in FSVs on January 2015.
- YTD the top markets for university students were: China with 30%, the USA 21% and India 6%.

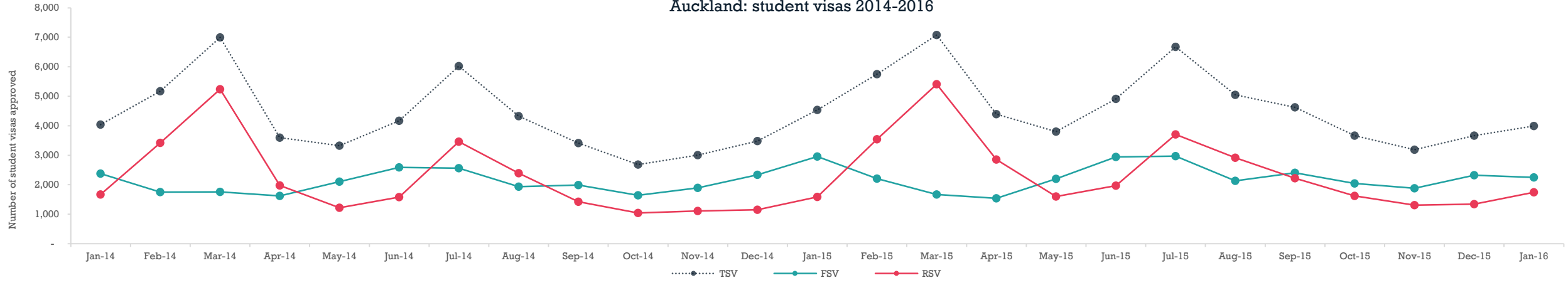


Trends by region

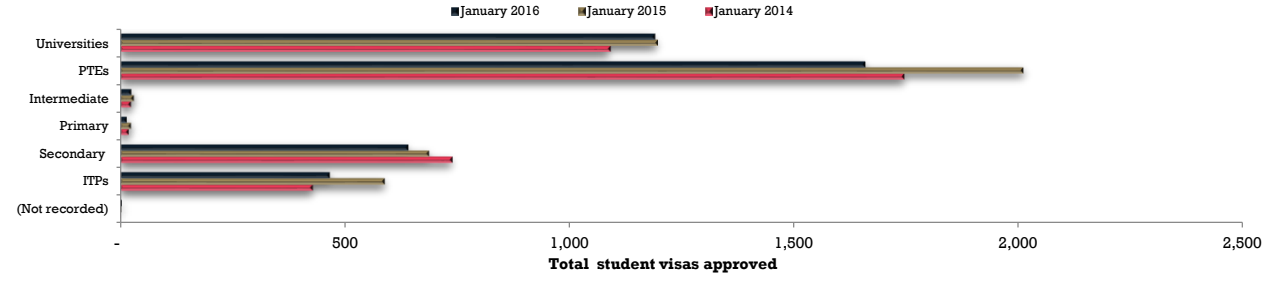
Auckland:

YTD RSV	YTD FSV	YTD TSV
↑ 158 10%	↓ -704 -24%	↓ -546 -12%

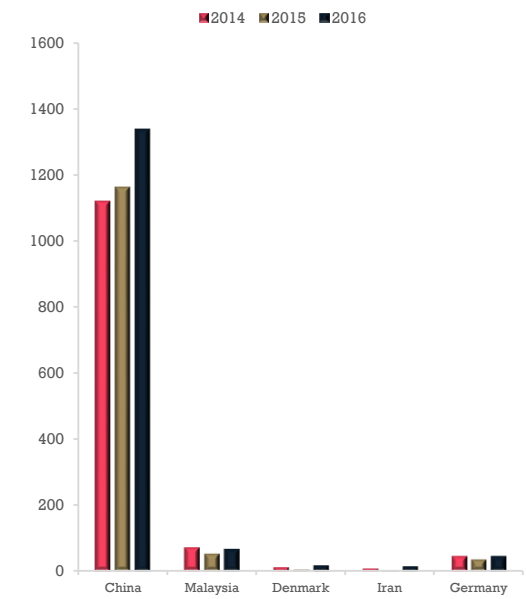
Auckland: student visas 2014-2016



Auckland: Total student visas issued by sector, January



YTD top five market shifts (TSVs)



Top market FSVs shifts

January FSVs	Change	% change
China	28	6%
Denmark	14	280%
Malaysia	13	50%
USA	-37	-19%
Brazil	-39	-23%
India	-590	-50%

FSVs YTD	Change	% change
China	28	6%
Denmark	14	280%
Malaysia	13	50%
USA	-37	-19%
Brazil	-39	-23%
India	-590	-50%

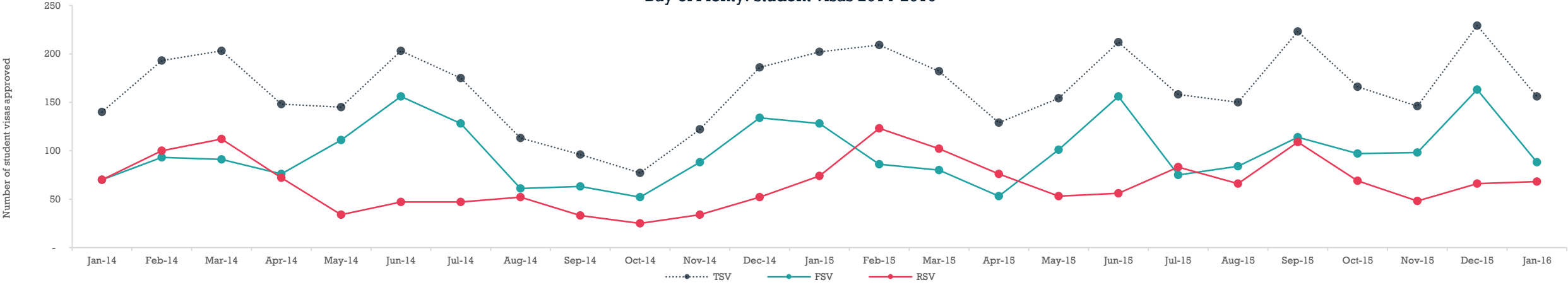
Key takeaways:

- The Auckland region has seen a decline in TSV down 12% (-546) and FSVs down 24% (-704), while RSVs are up 10% (158).
- Growth in FSVs was from China, Denmark and Malaysia.

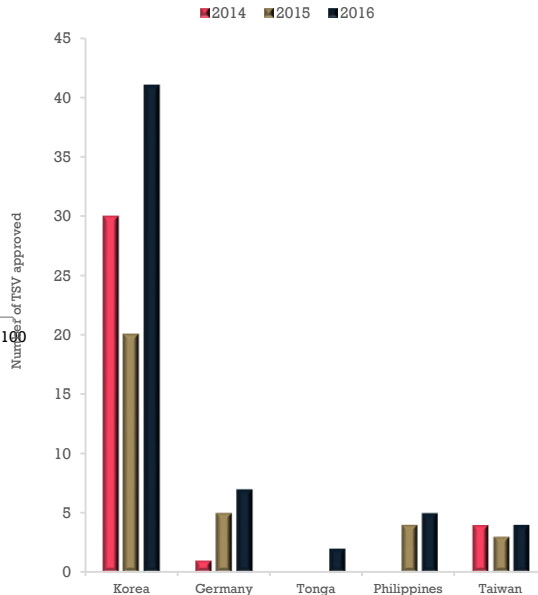
YTD RSV	YTD FSV	YTD TSV
↓ -6 -8%	↓ -40 -31%	↓ -46 -23%

Bay of Plenty:

Bay of Plenty: student visas 2014-2016



YTD top five market shifts (TSVs)

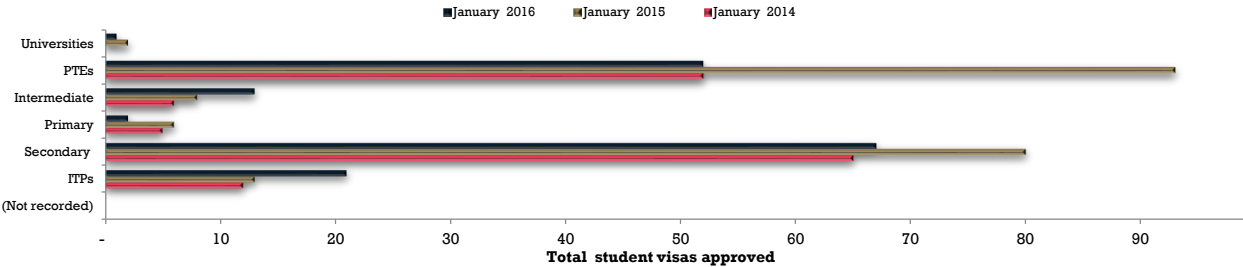


Top market FSVs shifts

January FSVs	Change	% change
Korea	5	56%
Germany	4	133%
Philippines	3	150%
Chile	-6	-67%
Brazil	-18	-69%
India	-24	-41%




FSVs YTD	Change	% change
Korea	5	56%
Germany	4	133%
Philippines	3	150%
Chile	-6	-67%
Brazil	-18	-69%
India	-24	-41%

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

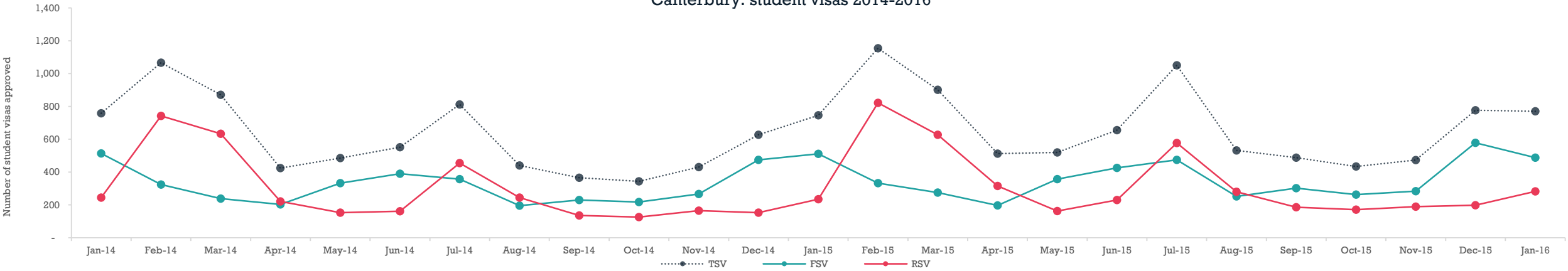


Key takeaways:

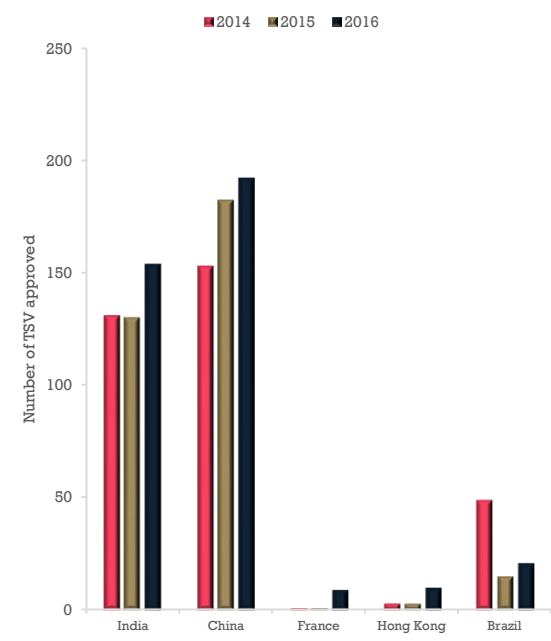
- Bay of Plenty results for January were down 23% (-46) in TSVs and FSV down 31% (-40).
- Growth in FSVs were seen from: Korea, Germany and the Philippines.

YTD RSV	YTD FSV	YTD TSV
 48 20%	 -23 -5%	 25 3%

Canterbury: student visas 2014-2016



YTD top five market shifts (TSVs)

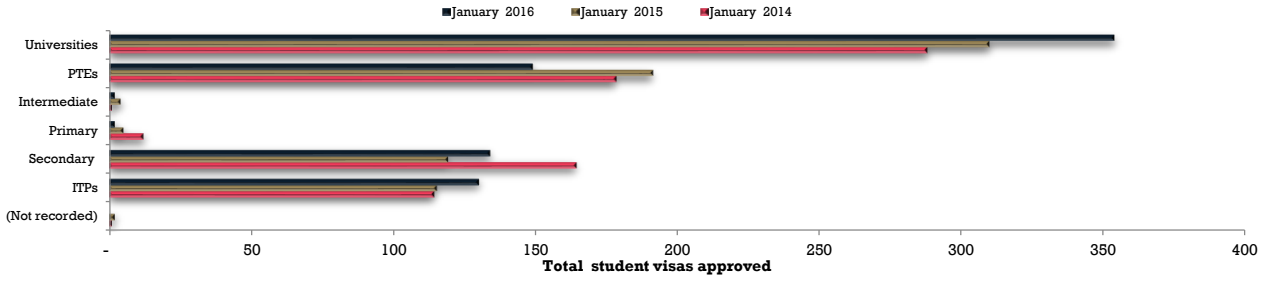


Top market FSVs shifts

January FSVs	Change	% change
France	7	700%
Brazil	6	43%
Germany	6	75%
Singapore	-6	-86%
China	-7	-8%
USA	-33	-31%

FSVs YTD	Change	% change
France	7	700%
Brazil	6	43%
Germany	6	75%
Singapore	-6	-86%
China	-7	-8%
USA	-33	-31%

Canterbury: Total student visas issued by sector, January



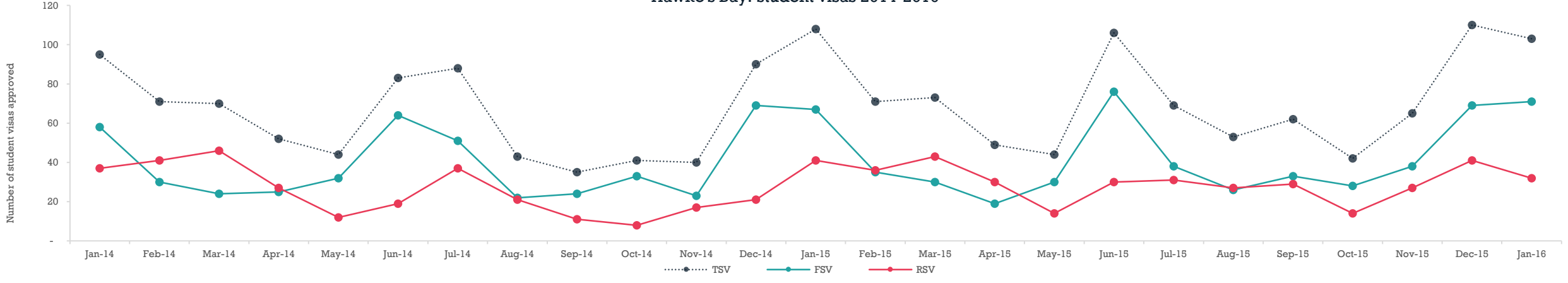
Key takeaways:

- Canterbury results were mixed with TSVs flat, up 3% (25) and FSVs down 5% (-23).
- Growth in FSVs in January were from: France, Brazil and Germany.
- The university sector experienced a 14% (44) increase in TSVs while both the ITP and secondary school sector increased by 13% (15) in TSVs in January.

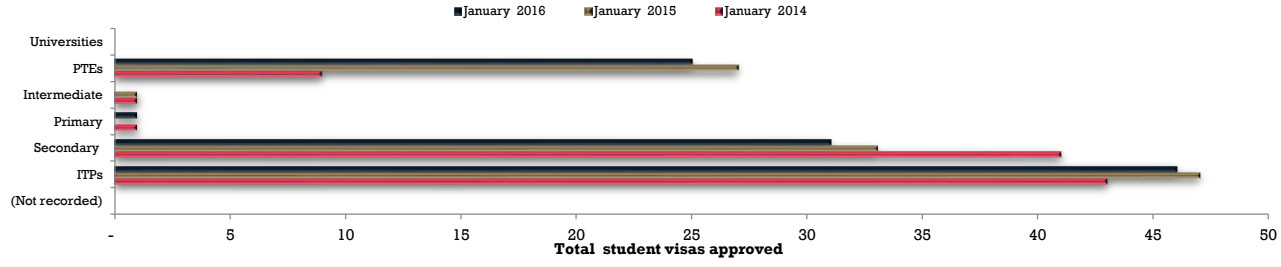
Hawke's Bay:

YTD RSV		YTD FSV		YTD TSV				
↓	-9	-22%	↑	4	6%	↓	-5	-5%

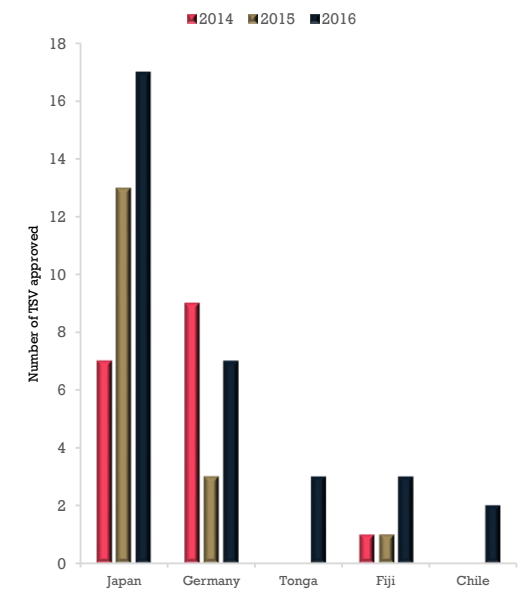
Hawke's Bay: student visas 2014-2016



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



YTD top five market shifts (TSVs)



Top market FSVs shifts

January FSVs	Change	% change
Japan	6	150%
Germany	5	500%
Fiji	3	N/A
Philippines	-1	-50%
China	-2	-22%
India	-10	-29%

FSVs YTD	Change	% change
Japan	6	150%
Germany	5	500%
Fiji	3	N/A
Philippines	-1	-50%
China	-2	-22%
India	-10	-29%

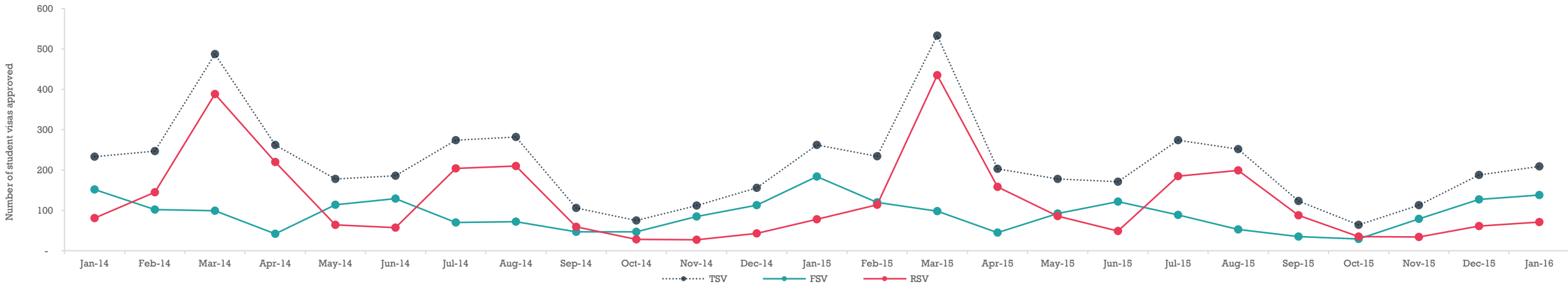
Key takeaways:

- Results were mixed in January with TSVs down 5% (-5) and FSVs up 6% (4).
- Growth in FSVs were from: Japan, Germany and Fiji.

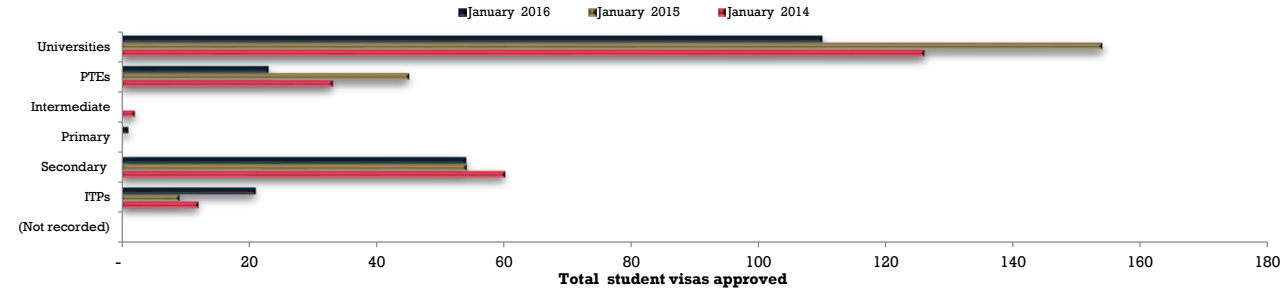
Manawatu:

YTD RSV		YTD FSV		YTD TSV	
↓	-7	↓	-9%	↓	-53
					-20%

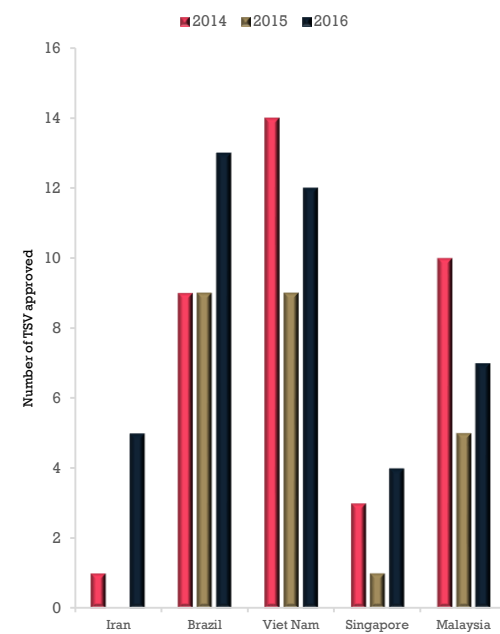
Manawatu: student visas 2014-2016



Manawatu: Total student visas issued by sector, January



YTD top five market shifts (TSVs)



Top market FSVs shifts

January FSVs	Change	% change
Viet Nam	5	500%
Brazil	4	44%
Malaysia	4	133%
Japan	-6	-43%
China	-12	-33%
USA	-27	-57%

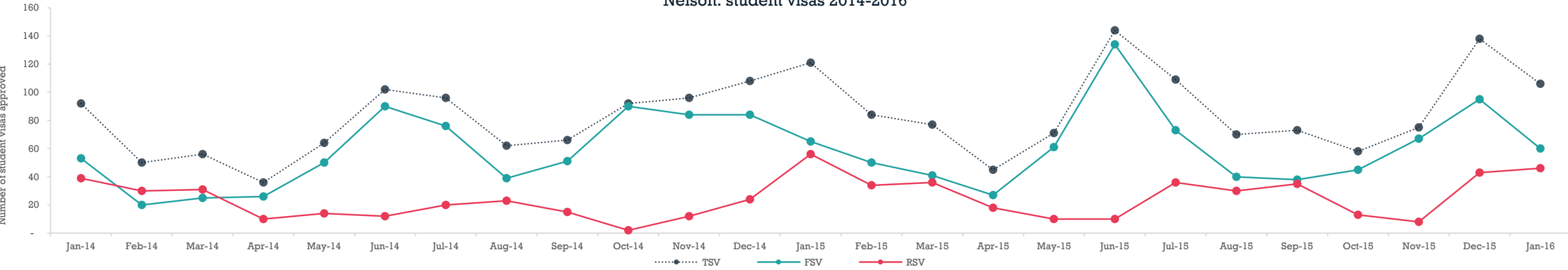
FSVs YTD	Change	% change
Viet Nam	5	500%
Brazil	4	44%
Malaysia	4	133%
Japan	-6	-43%
China	-12	-33%
USA	-27	-57%

Key takeaways:

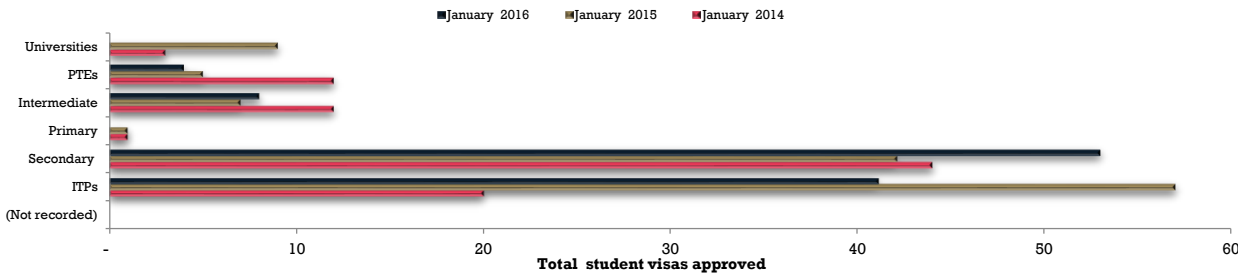
- Results for the Manawatu region were down in January. TSVs were down 20% (-23) and FSVs down 25% (-46).
- Growth in FSVs were from: Viet Nam, Brazil and Malaysia.
- The ITP sector experienced an increase of 133% (12) in TSVs in January.

YTD RSV		YTD FSV		YTD TSV	
↓	-10	↓	-5	↓	-15
	-18%		-8%		-12%

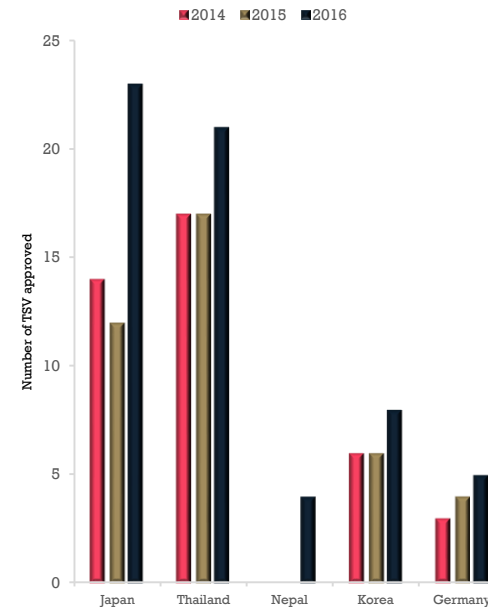
Nelson: student visas 2014-2016



Nelson: Total student visas issued by sector, January



YTD top five market shifts (TSVs)



Top market FSVs shifts

January FSVs	Change	% change
Japan	9	100%
Korea	5	250%
Nepal	4	N/A
Philippines	-1	-50%
Brazil	-2	-50%
India	-31	-84%

FSVs YTD	Change	% change
Japan	9	100%
Korea	5	250%
Nepal	4	N/A
Philippines	-1	-50%
Brazil	-2	-50%
India	-31	-84%

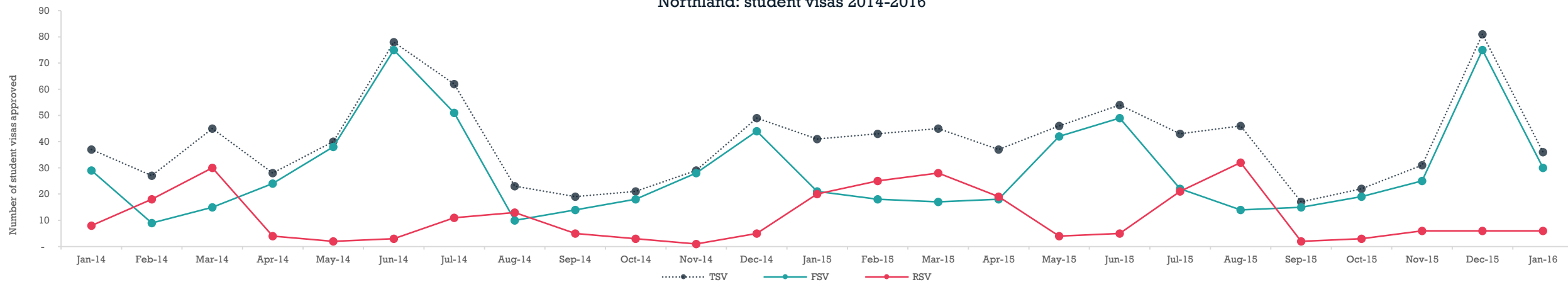
Key takeaways:

- The Nelson region experienced a decline in students visas in January, TSVs were down 12% (-19) and FSVs down 8% (-5).
- Growth in FSVs were from: Japan, Korea and Nepal.

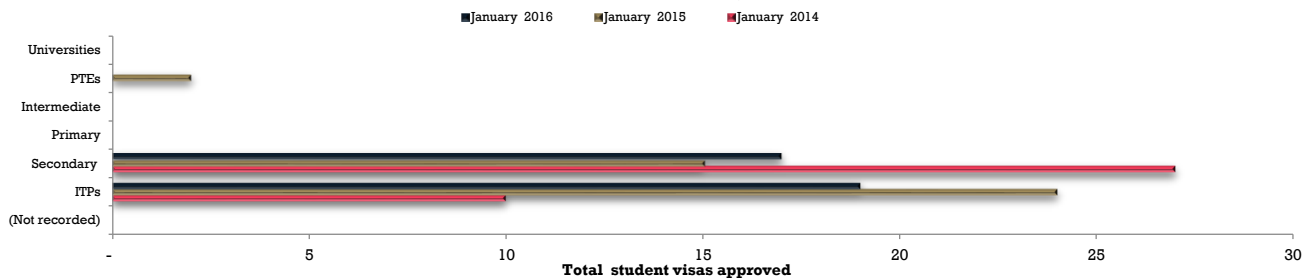


YTD RSV		YTD FSV		YTD TSV	
↓	-14	↑	9	↓	-5
	-70%		43%		-12%

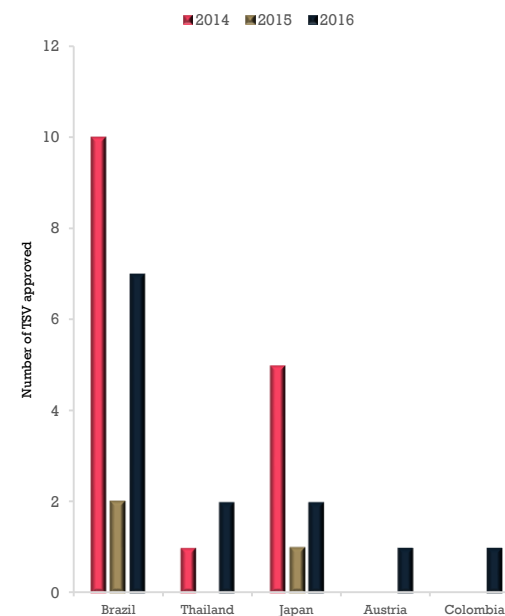
Northland: student visas 2014-2016



Northland: Total student visas issued by sector, January



YTD top five market shifts (TSVs)



Top market FSVs shifts

January FSVs	Change	% change
China	10	333%
Brazil	5	250%
Japan	2	N/A
Fiji	-1	-100%
Chile	-1	-50%
India	-4	-80%

FSVs YTD	Change	% change
China	10	333%
Brazil	5	250%
Japan	2	N/A
Fiji	-1	-100%
Chile	-1	-50%
India	-4	-80%

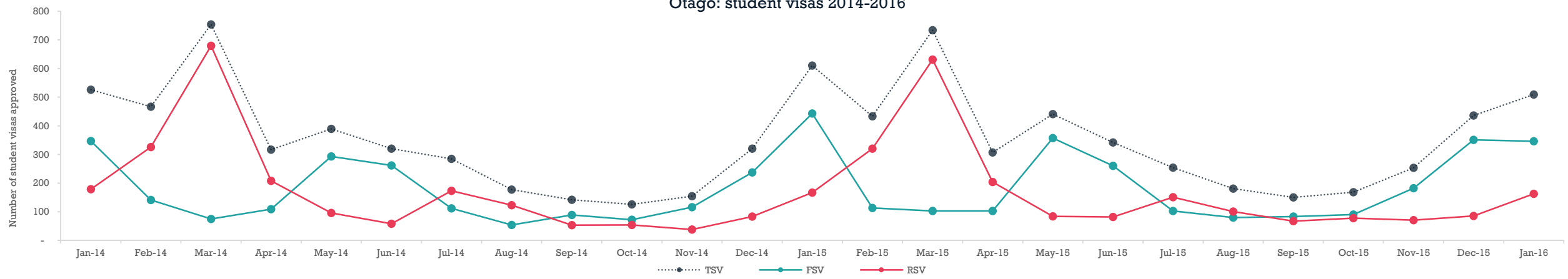
Key takeaways:

- Northland's result for January was mixed with TSVs down 12% (-9) and FSVs up 43% (9).
- Growth in FSVs were from: China, Brazil and Japan.
- Secondary schools TSVs increased 13%(2) in January 2016 compared to January 2015.

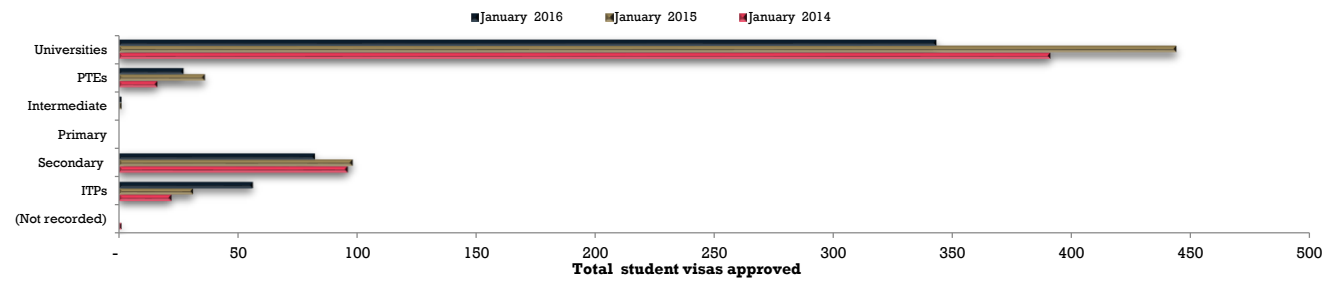
Otago:

YTD RSV		YTD FSV		YTD TSV				
➔	-4	-2%	⬇️	-97	-22%	⬇️	-101	-17%

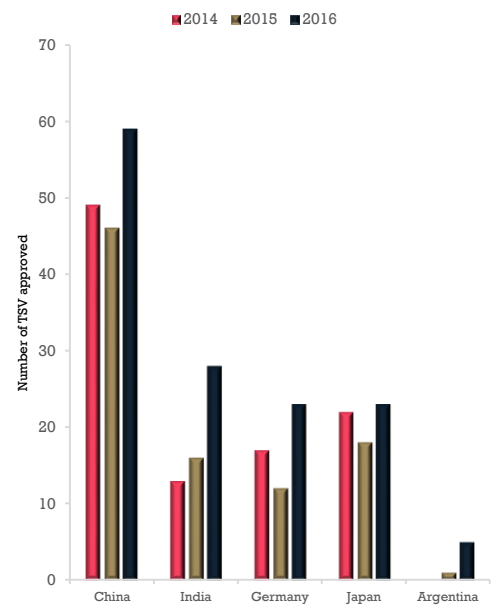
Otago: student visas 2014-2016



Otago: Total student visas issued by sector, January



YTD top five market shifts (TSVs)



Top market FSVs shifts

January FSVs	Change	% change
Germany	11	110%
Thailand	6	100%
Ireland	4	N/A
Colombia	-5	-56%
Malaysia	-12	-46%
USA	-89	-80%

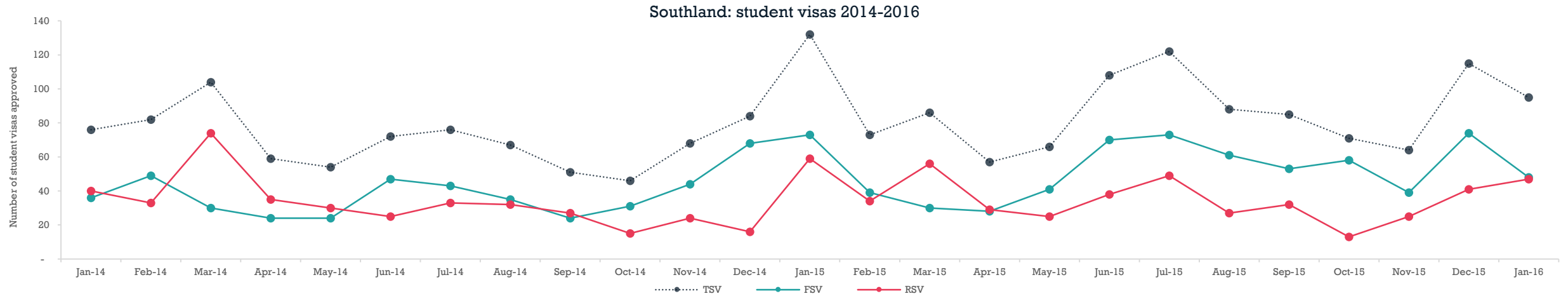
FSVs YTD	Change	% change
Germany	11	110%
Thailand	6	100%
Ireland	4	N/A
Colombia	-5	-56%
Malaysia	-12	-46%
USA	-89	-80%

Key takeaways:

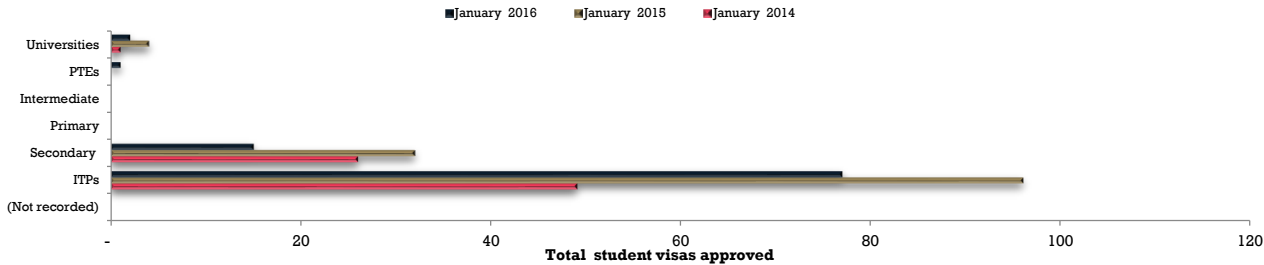
- January results for Otago were negative, TSVs down 17% (-101) and FSVs down 22% (-97).
- Growth in FSVs were from: Germany, Thailand, and Ireland.
- ITPs in the Otago region experienced a 81% (25) increase in TSVs for January.



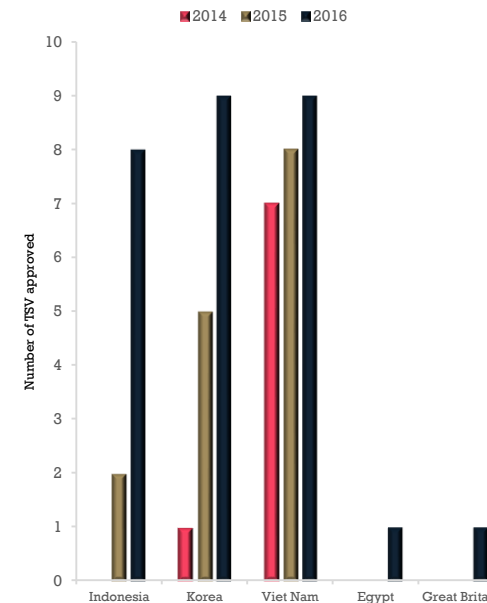
YTD RSV	YTD FSV	YTD TSV
↓ -12	↓ -20%	↓ -37
-20%	-34%	-28%



Southland: Total student visas issued by sector, January



YTD top five market shifts (TSVs)



Top market FSVs shifts

January FSVs	Change	% change
Indonesia	3	150%
Egypt	1	N/A
Great Britain	1	N/A
Thailand	-3	-100%
Sri Lanka	-4	-57%
India	-14	-50%

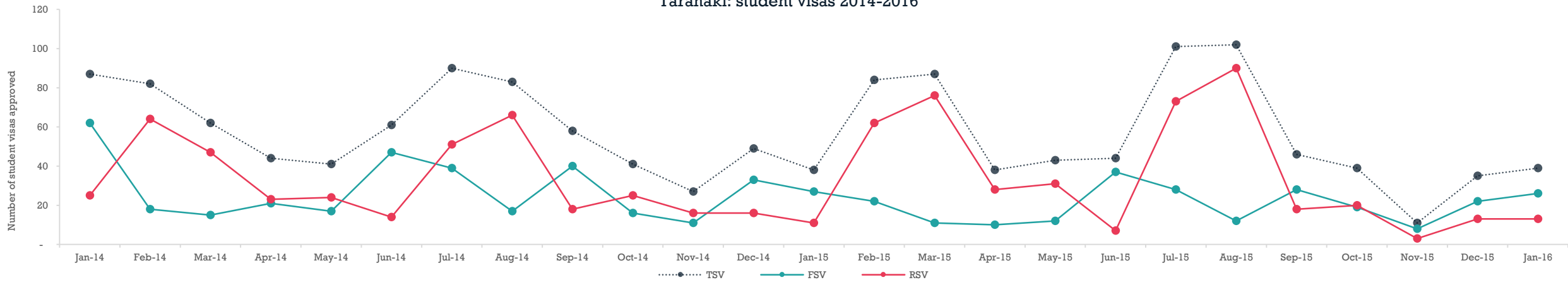
FSVs YTD	Change	% change
Indonesia	3	150%
Egypt	1	N/A
Great Britain	1	N/A
Thailand	-3	-100%
Sri Lanka	-4	-57%
India	-14	-50%

Key takeaways:

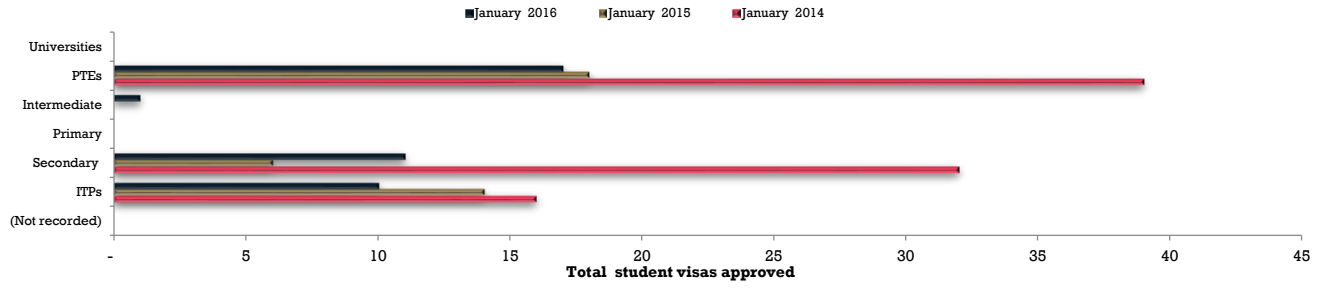
- The Southland region saw negative results in January with TSVs down 28% (-37) and FSVs down 34% (-25).
- Growth in FSVs for January were from: Indonesia, Egypt and Great Britain.

YTD RSV	YTD FSV	YTD TSV
↑ 2 18%	→ -1 -4%	→ 1 3%

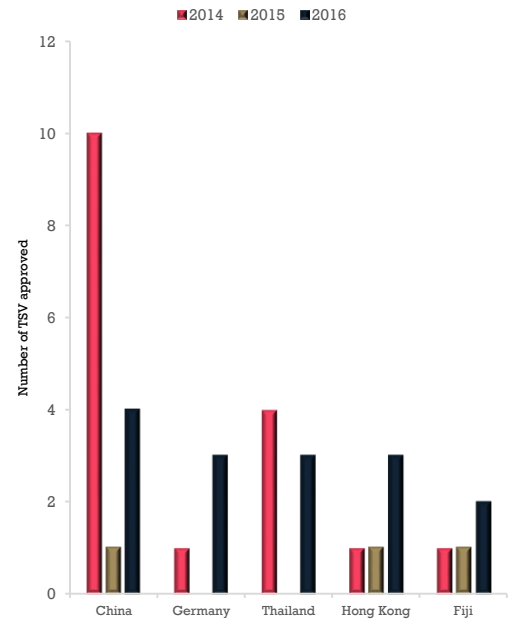
Taranaki: student visas 2014-2016



Taranaki: Total student visas issued by sector, January



YTD top five market shifts (TSVs)



Top market FSVs shifts

January FSVs	Change	% change
China	3	300%
Germany	2	N/A
Thailand	2	N/A
Argentina	-1	-100%
Russia	-2	-50%
India	-7	-44%

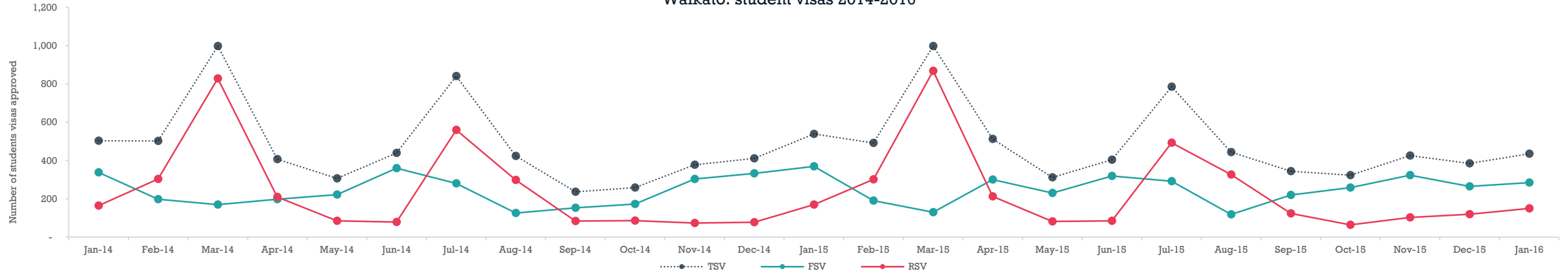
FSVs YTD	Change	% change
China	3	300%
Germany	2	N/A
Thailand	2	N/A
Argentina	-1	-100%
Russia	-2	-50%
India	-7	-44%

Key takeaways:

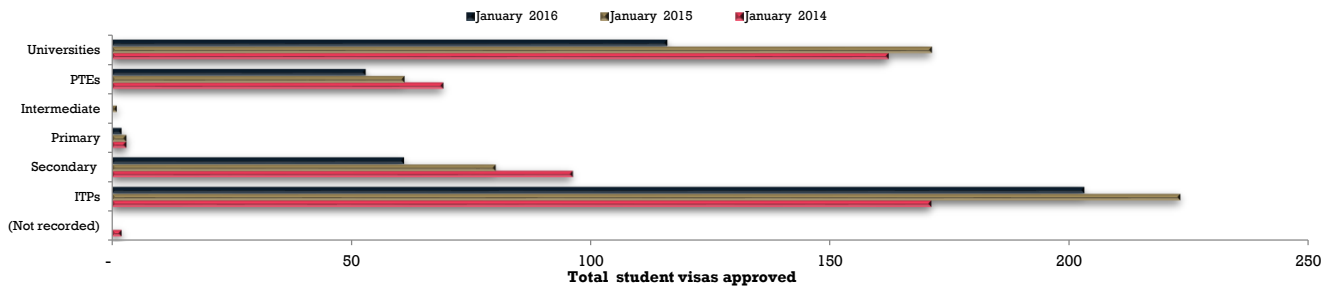
- Taranaki's results were flat in January with TSVs up 3% (1) and FSVs down 4% (-1).
- Growth in FSVs were from: China, Germany and Thailand.
- Secondary school TSVs increased by 83% (5) in January.

YTD RSV		YTD FSV		YTD TSV				
↓	-20	-12%	↓	-84	-25%	↓	-104	-19%

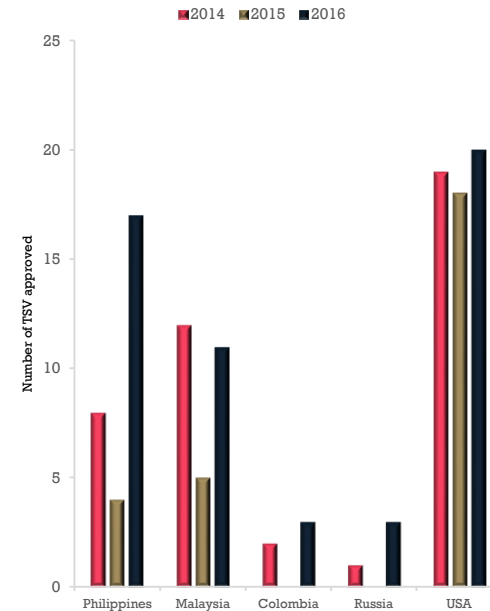
Waikato: student visas 2014-2016



Waikato: Total student visas issued by sector, January



YTD top five market shifts (TSVs)



Top market FSVs shifts

January FSVs	Change	% change
Philippines	12	300%
Malaysia	4	133%
Japan	3	50%
Tonga	-8	-100%
Great Britain	-10	-33%
India	-57	-35%

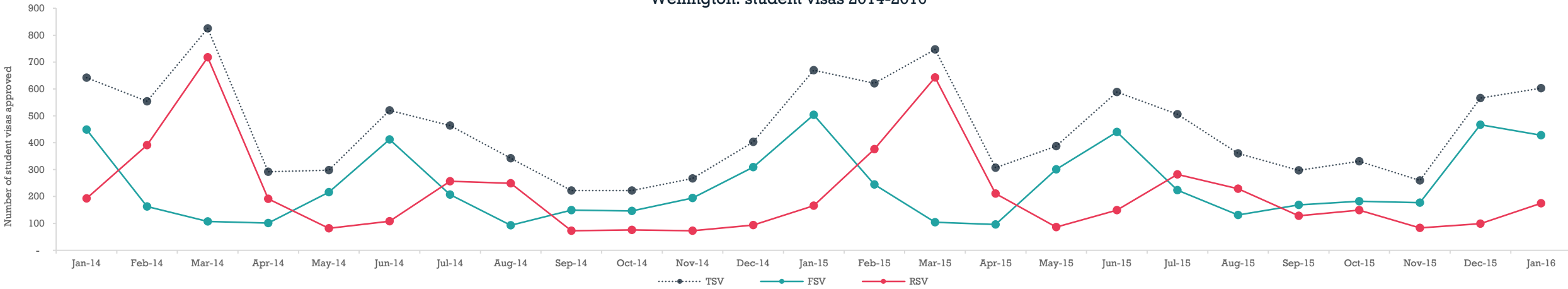
FSVs YTD	Change	% change
Philippines	12	300%
Malaysia	4	133%
Japan	3	50%
Tonga	-8	-100%
Great Britain	-10	-33%
India	-57	-35%

Key takeaways:

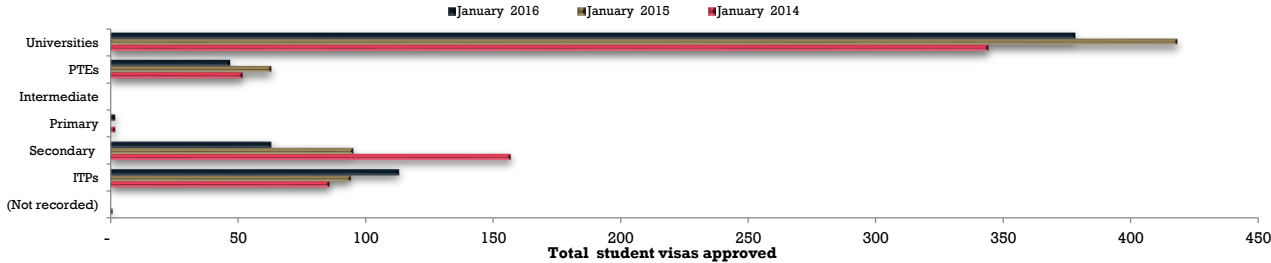
- January results for the Waikato region were down in TSVs -19% (-104) and FSVs -25% (-84).
- Markets that saw growth in FSVs were: the Philippines, Malaysia and Japan.

YTD RSV	YTD FSV	YTD TSV
↑ 9 5%	↓ -76 -15%	↓ -67 -10%

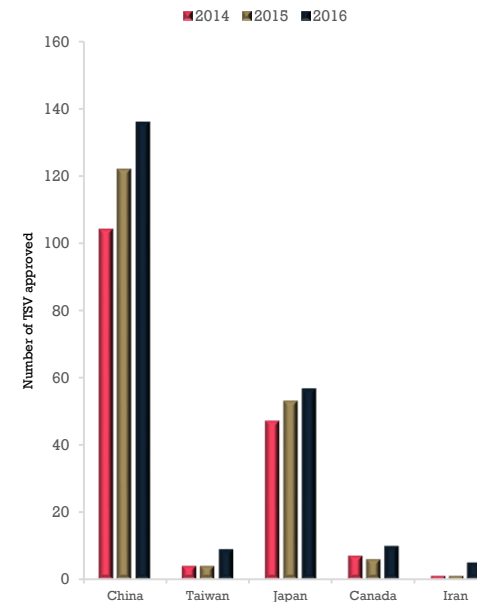
Wellington: student visas 2014-2016



Wellington: Total student visas issued by sector, January



YTD top five market shifts (TSVs)



Top market FSVs shifts

January FSVs	Change	% change
China	5	8%
Iran	4	
Indonesia	3	43%
India	-10	-17%
Brazil	-16	-70%
USA	-45	-33%

FSVs YTD	Change	% change
China	5	8%
Iran	4	
Indonesia	3	43%
India	-10	-17%
Brazil	-16	-70%
USA	-45	-33%

Key takeaways:

- Wellington saw negative results in January with TSVs down 10% (-67) and FSVs down 15% (-76).
- Growth in FSVs for January were from: China, Iran and Indonesia.
- The ITP sector experienced an 20% (19) increase in TSVs in January compared to January 2015.

Appendix



About the Student Visa Dashboard

ThinkNew®



- *The following dashboard was developed by Education New Zealand and is based on Immigration New Zealand (INZ) data on issued student visas. This data source is the most immediate/instantaneous data available on the international education sector, as there is only a one month lag between student visas approved and INZ publishing the data. Student visa data is a strong indicator of whether students are entering, remaining in or leaving New Zealand, which can be used as a predictor for future enrolment trends.*
- *Student visa trends allow us to analyse two key indicators: 1) growth of new students and 2) retention of students.*
- *We use first time student visas as an indicator of growth as it represents new students and the pipeline of students entering New Zealand.*
- *Total student visas gives us an overview of all student visas (i.e. first time student visas and students renewing their visas).*
- *We can analyse the retention of students by subtracting first time student visas from total student visas.*



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



How to read the dashboard

Name of the market/region/sector

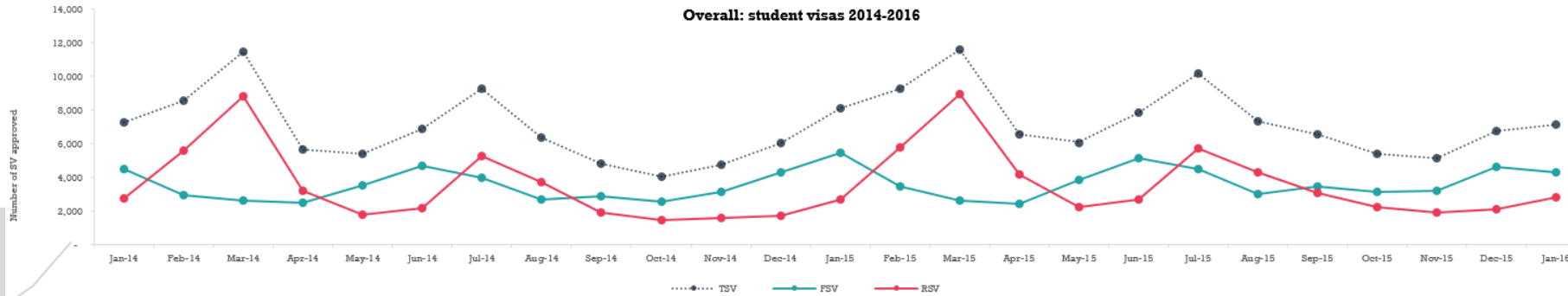
Indicator of the overall performance of the market

- The monthly/YTD result:
- Actual change in visa numbers
 - Percentage change in visas
 - Directional indicator

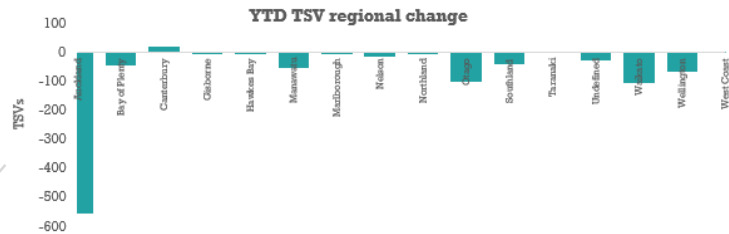
Overall:

YTD RSV		YTD FSV		YTD TSV	
↑	127	5%	↓	-1,112	-20%
				↓	-985
					-12%

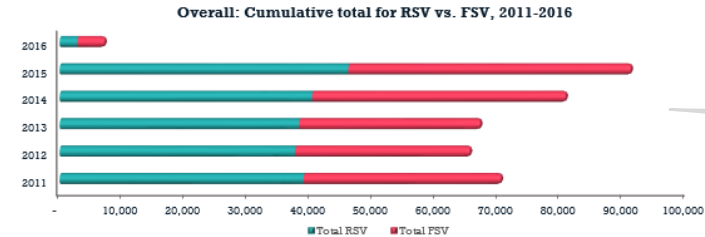
YTD (January)



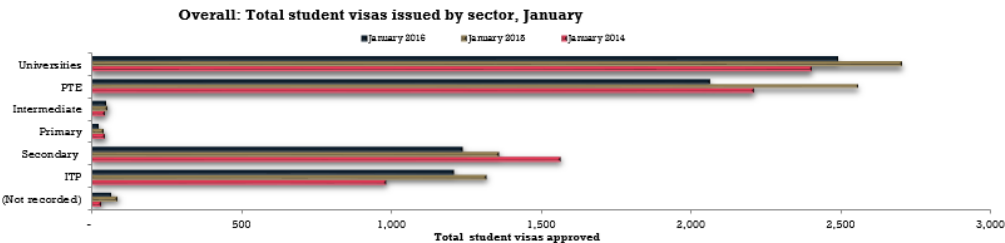
These graphs show a monthly trend of actual TSV, FSV and RSV approvals from 2014 – 2016.



These graphs shows the regional change for the market



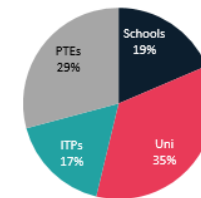
Shows the calendar year results for FSVs + RSVs. This also demonstrates the proportional make-up of a market as we progress through the year, while comparing the overall result from previous years.



Key or interesting trends to consider

- Key takeaways:**
- Overall January result were mixed, TSV were down 12% (-985), FSVs down 20% (-1,112) and RSVs up 5% (127).
 - The university sector accounted for 35% of TSVs approved followed by the PTE sector 29% in January.

YTD 2016 Sector breakdown of TSVs



This pie graph represents the sector distribution of TSVs YTD.