Overall student visa trends

December 2016

NEW ZEALAND
IMMIGRATION

Caveats and notes

1. Student visas verses visitor visas:
   - Student visas only capture students who enter New Zealand with a student visa. These students are mostly those who are planning to study for more than three months.
   - Students who undertake a course less than three months in duration are not required to enter on a student visa. Students who do choose to enter on a visitor visa (usually from visa-free nationalities) are not captured in this dashboard.
   - Working holiday visas also allow students to study for up to six months. Those who enter NZ on a working holiday visa and plan on taking up this option are also not included in this dashboard. These factors will impact the private training establishments (PTE; including English Language Schools) numbers.

2. Student visas vs. enrolments:
   - There is a potential delay of up to three months between students having their visas approved and their actual entry into New Zealand, therefore the figures shown here may not necessarily represent the actual number of students currently in New Zealand.

3. Other exclusions:
   - This dashboard excludes dependants, applicants under Section 61, and Variation of Conditions. Dashboards prior to May 2015 include approvals from "all" applicants, including dependants.

Executive summary

1. Total student visas (TSV), for 2016 decreased by 4% (-3,556) compared to 2015. First time student visas (FSV) decreased by 12% (-5,468), and returning student visas (RSV) increased by 4% (+1,912) compared to 2015.

2. However, when 2016 is compared to an average of the previous three years, there were increases for all types of visas. TSV increased by 10% (+7,887), FSV increased by 4% (+1447) and RSV increased by+16% (+6,430).

3. Indian FSV decreased by 5,180 (-41%) in 2016 when compared to 2015.
- The surge in FSV applications prior to Rule 18 implementation created a bubble of FSV in 2015 which has exacerbated the decline.
- Indian FSV decreased by 25% (-2,537) compared to an average of the previous three years. Indian TSV for the month of November 2016 (766) are now at the lowest since December 2013.
- Despite the decrease in FSV, total Indian student numbers from January to August 2016 had increased by 14% (compared to the same period in 2015), although student numbers slightly dropped in the private training enterprises (PTE) sector.

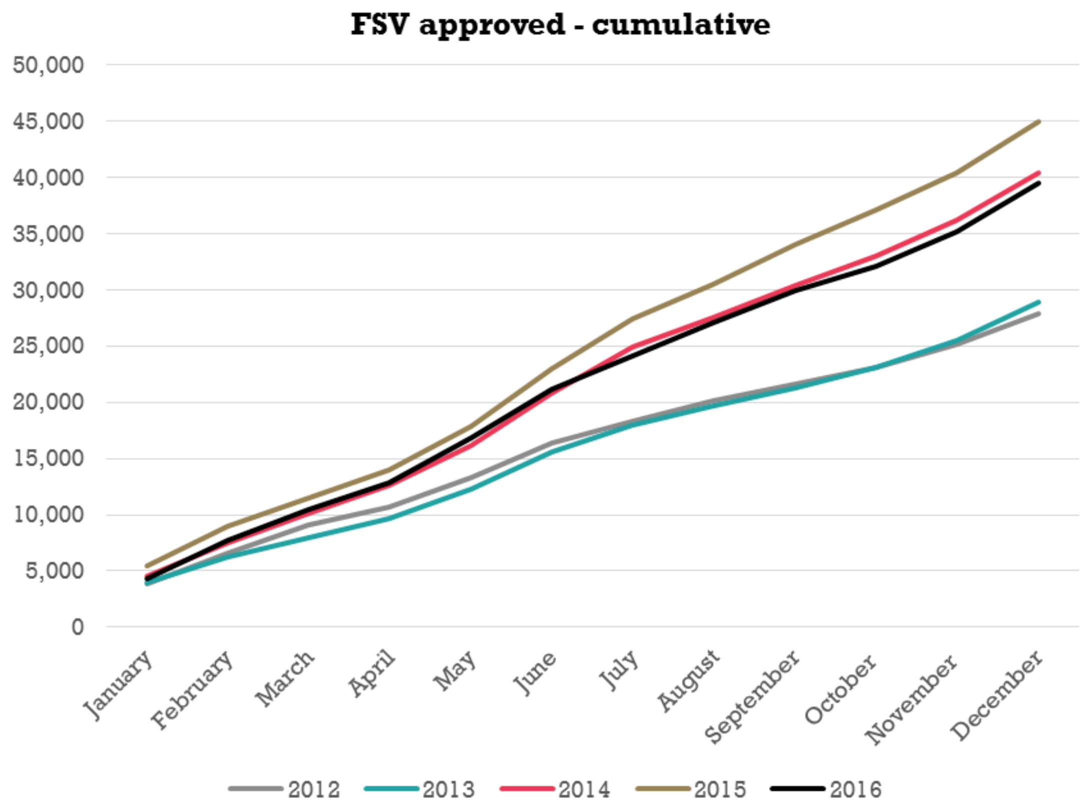
4. Chinese TSV increased by 9% (+2,575) from 2015 to 2016, which helped offset some of the decline in FSV from India. Compared to an average of the previous three years, the growth was 24% for China.
- FSV for China are up 27% (+2,029) compared to the average of the previous three years.
- Most FSV increase is from the PTE sector (+863).
- RSV for China are up 22% (+4,135), with increases at universities (+1,498), PTE (+1,059) and secondary schools (+1,042).

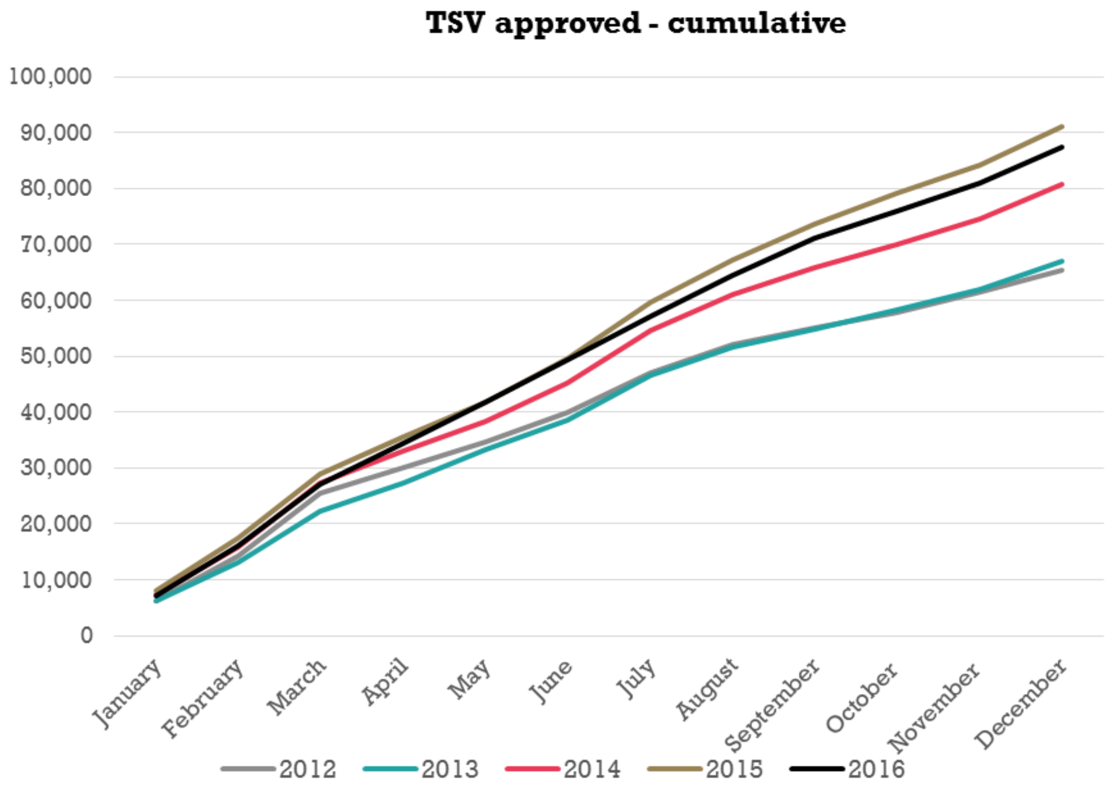
Outlook

5. Ministry of Education student numbers for 2016 are expected to be up 5-7% on 2015 numbers (unavailable until circa April 2017).

6. However, student numbers for 2017 are anticipated to be slightly down on 2016 numbers as the decline in Indian student visas begins to manifest in enrolments.

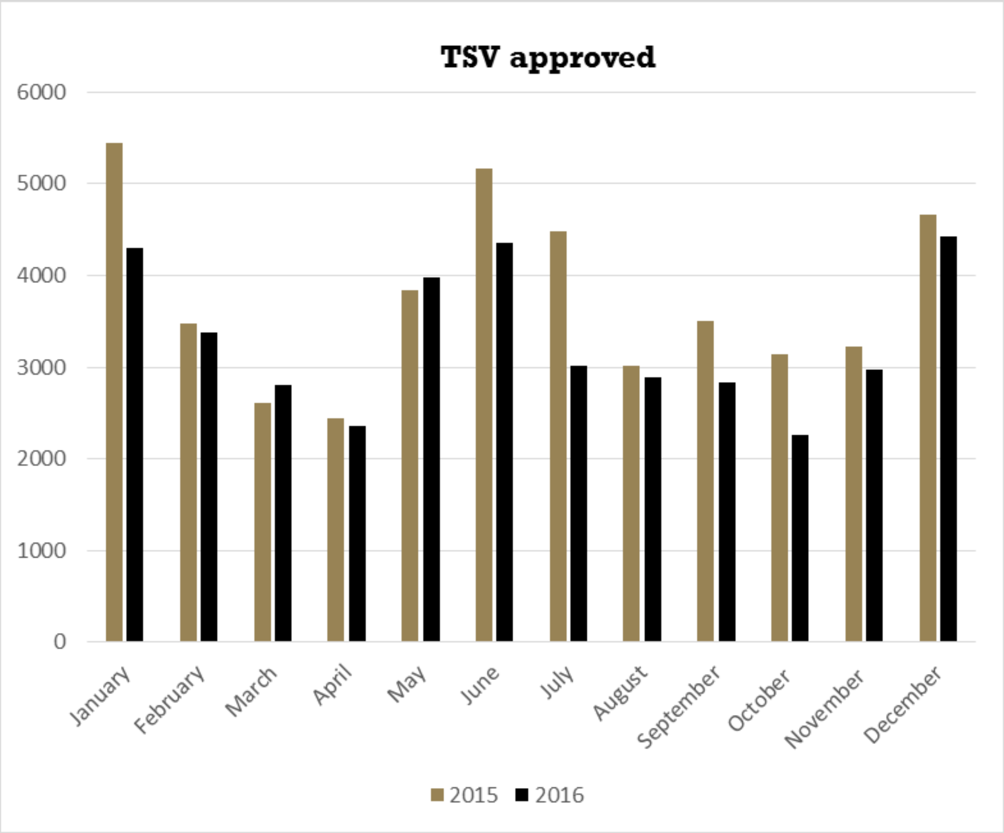
Comparison to previous years (Cumulative)

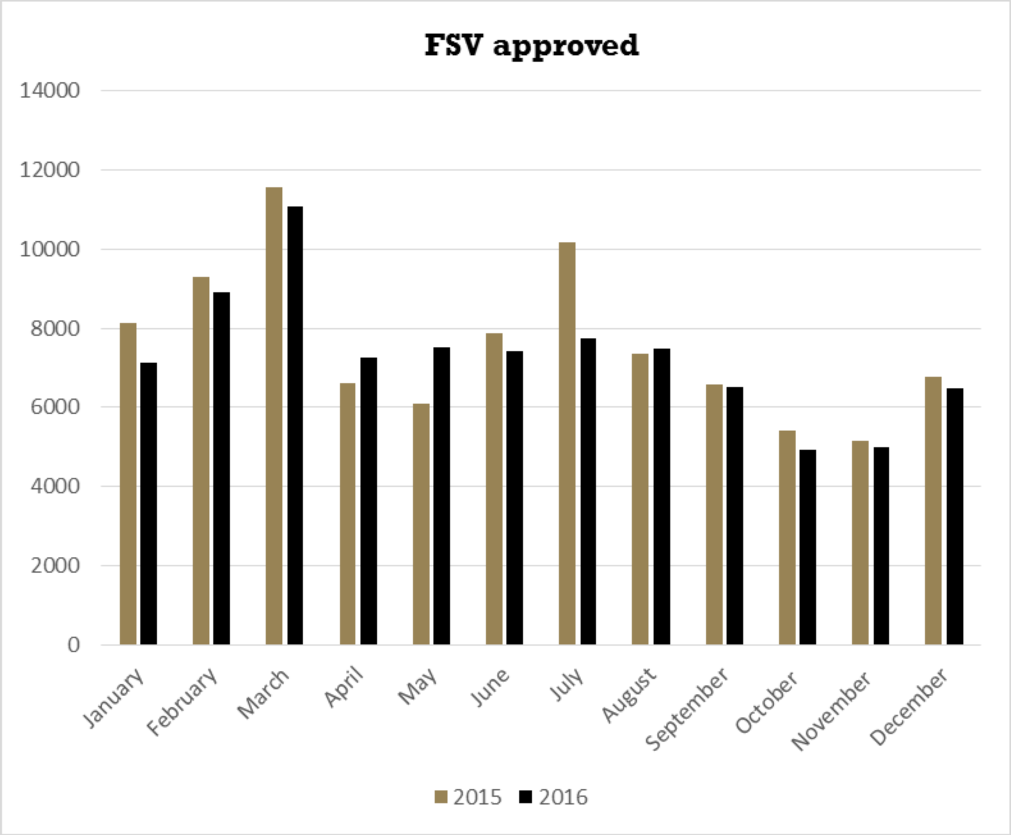




- TSV are down (-4%) compared to last year (2016: 87,436 TSV v 2015: 90,992 TSV)
- TSV increased (+10%, +7,877) compared to the average of the last three years.
- Overall FSV are down 12% (-5,468) compared to 2015 (2016: 39,533 vs. 2015: 45,001). However, they remain 4% up on the average of the previous two years (+1,447).
- RSV increased by 4% (+1,912) from 2015 which has partially offset the decrease in FSVs.
- The main decline in FSV compared to the three year average has come from India (-25%, -2,537). The 7,603 FSV issued to Indians is the lowest since 2013.
- Increases in FSVs from China (+27%, +2,029), and a few other countries will help cushion the decline in FSV from India.

Month-on-month comparison to previous year





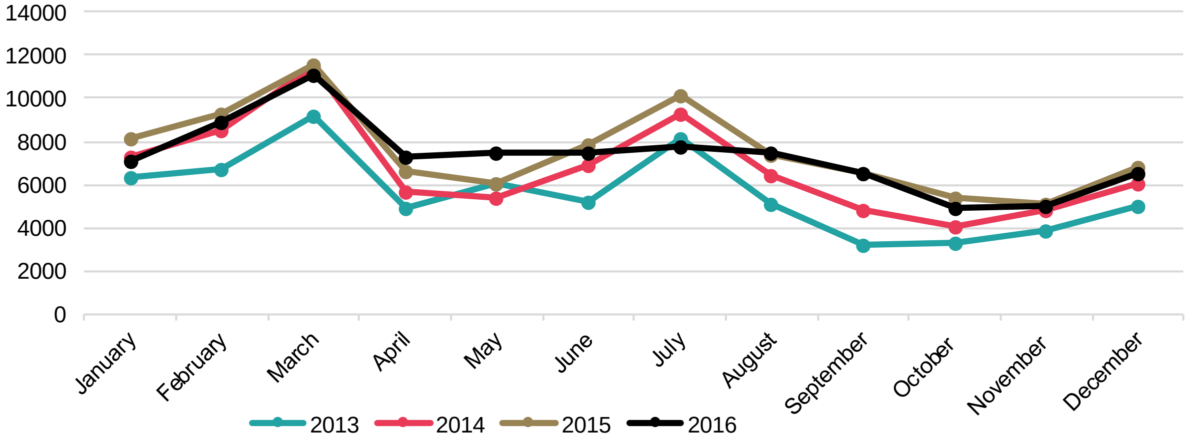
- December 2016 FSV (-5%, -232) and RSV (-2%, -47) were both down compared to December 2015.
- The main driver of this drop was Indian TSV (-27%, -284). This was partially offset by increases in German, Chinese and Filipino visas.
- The main driver of the drop in FSV was also India (-26%, -197) and Japan (-120, -25%), which has also been partially offset by increases in German, Chinese and Filipino visas.

Trends by market

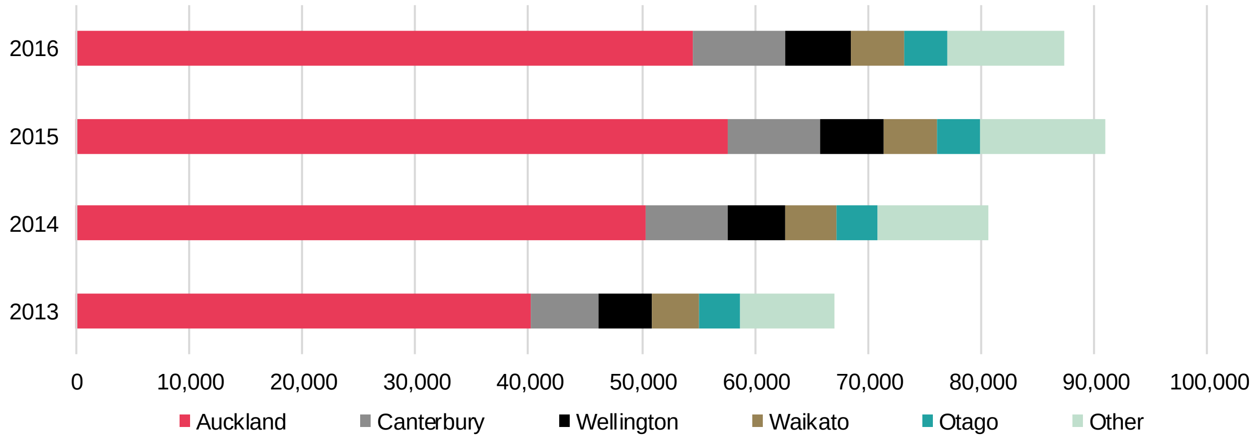
All markets December 2016

TSV, for 2016 decreased by 4% (-3,556) compared to 2015. FSV decreased by 12% (-5,468), and RSV increased by 4% (+1,912) compared to 2015. However, when TSV are compared to an average of the previous three years, a 10% increase can be seen, which was mainly driven by increases in visas for students studying in the PTE sector.

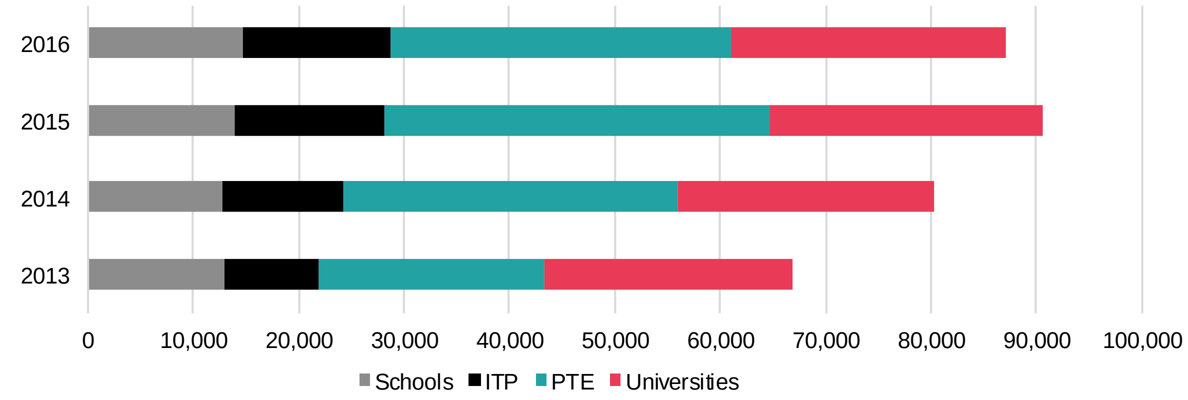
All markets: TSV issued in 2013-2016



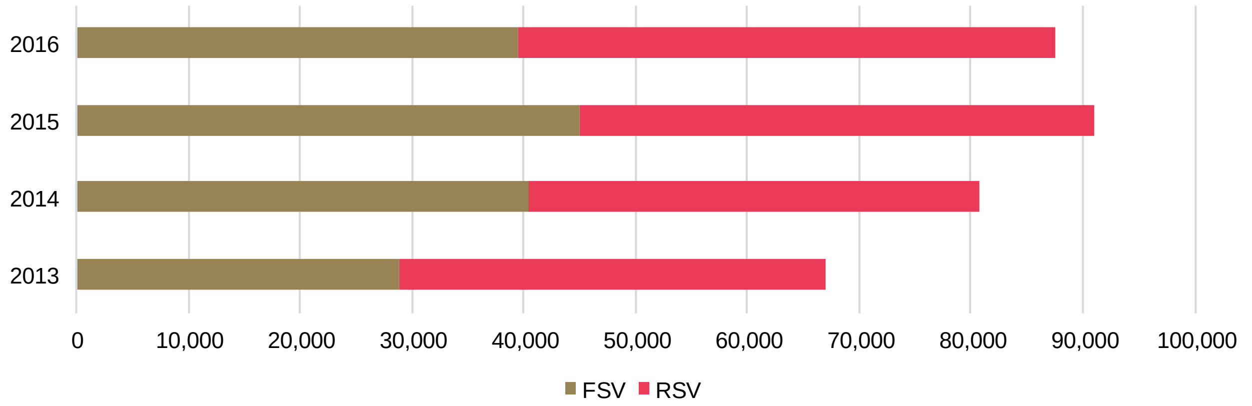
All markets: TSV by region



All markets: Sector breakdown for 2013-2016



All markets : Cumulative total for RSV and FSV, 2014-2016



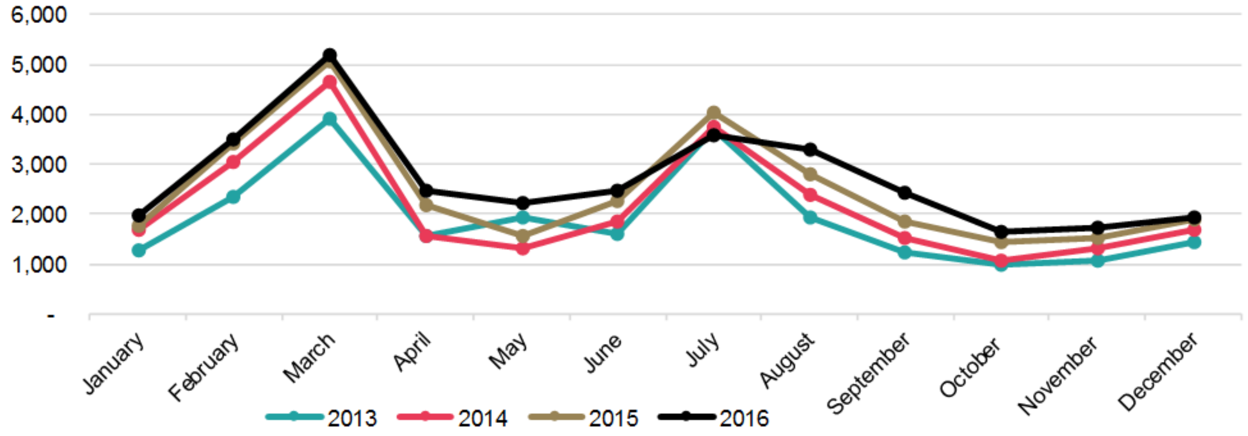
87,436	Visas issued in 2016 compared to an average of the previous three years	RSV	6,429	16%	FSV	1,447	4%	TSV 7,877	10%
6,497	Visas issued in December 2016 compared to previous two Decembers	RSV	145	7%	FSV -	50	-1%	TSV 95	1%

China

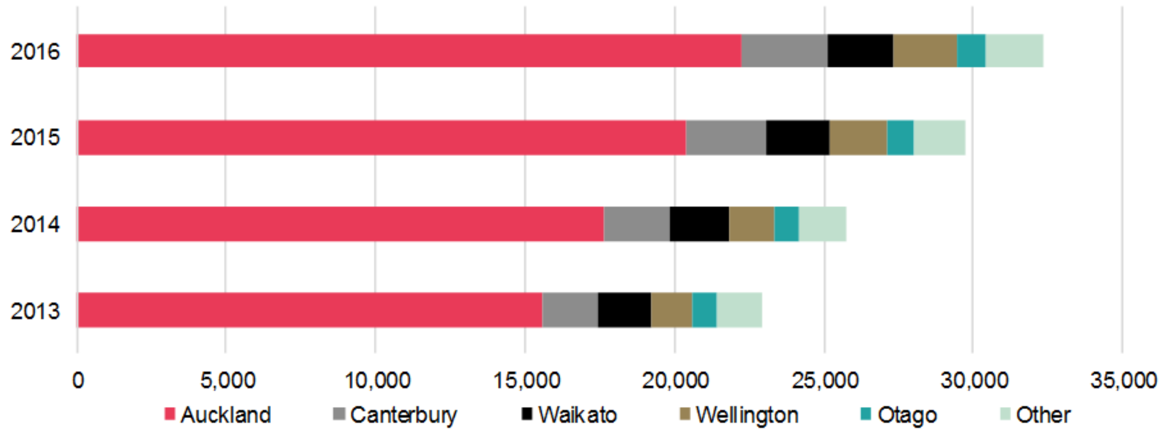
December 2016

TSV increased by 9% (+2,575) from 2015 to 2016. However, when compared to an average of the previous three years, Chinese TSV increased by 24%. This rise was in all sectors, with the schools and PTE sectors showing the largest growth. Auckland led the growth in TSV; however all regions apart from Taranaki increased in Chinese TSV compared to an average of the previous three years.

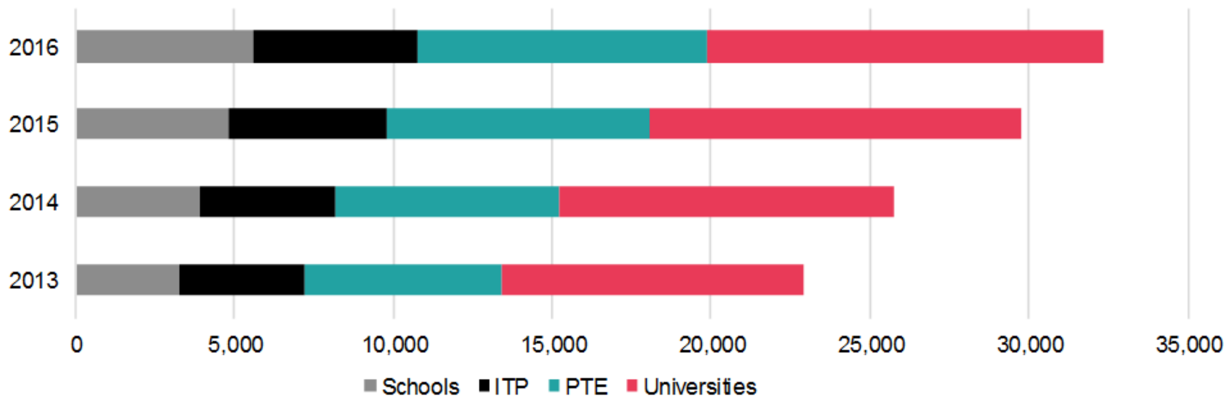
Student visas approved for China 2013-2016



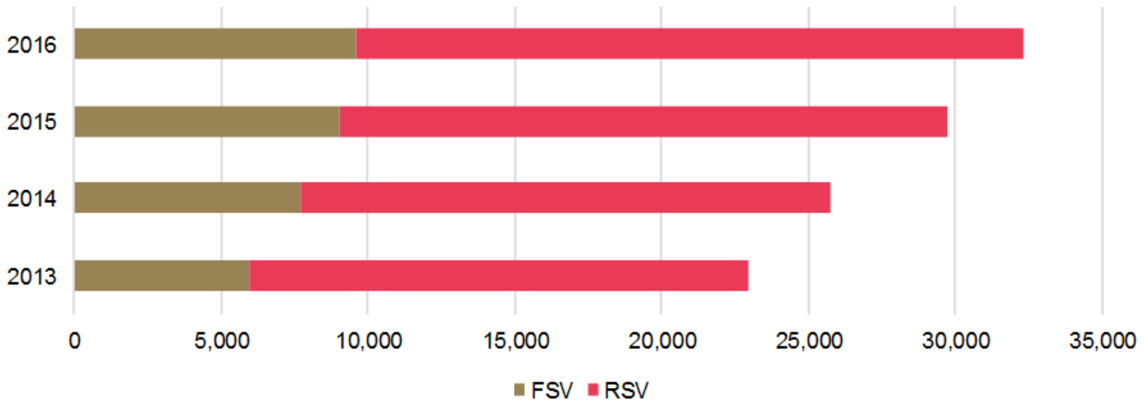
China: TSV by region



Sector breakdown for TSV for China 2016



China : Cumulative total for RSV and FSV, 2014-2016



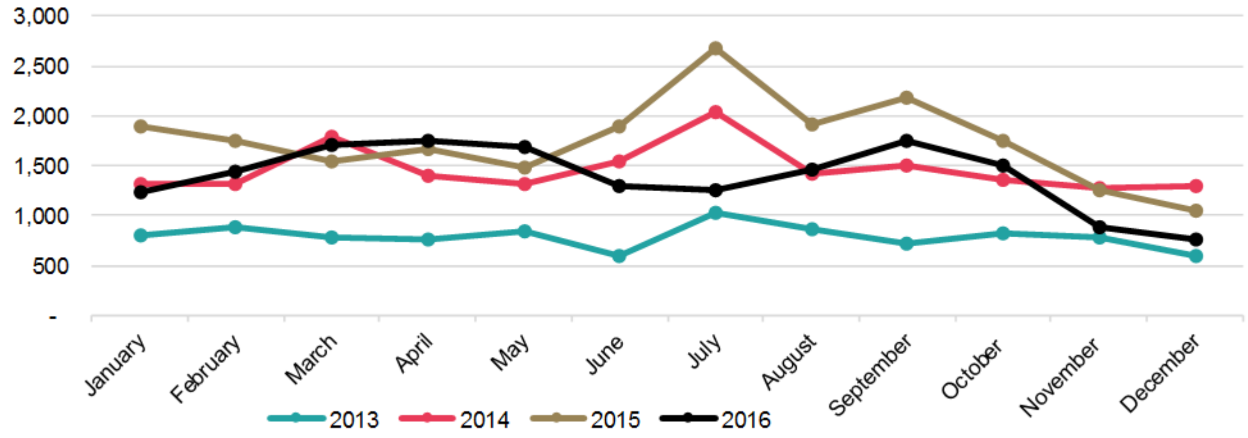
32,322	Visas issued in 2016 compared to an average of the previous three years	RSV	4,135	↑	22%	FSV	2,029	↑	27%	TSV	6,164 ↑ 24%
1,917	Visas issued in December 2016 compared to previous two Decembers	RSV	87	↑	10%	FSV	55	↑	6%	TSV	142 ↑ 8%

India

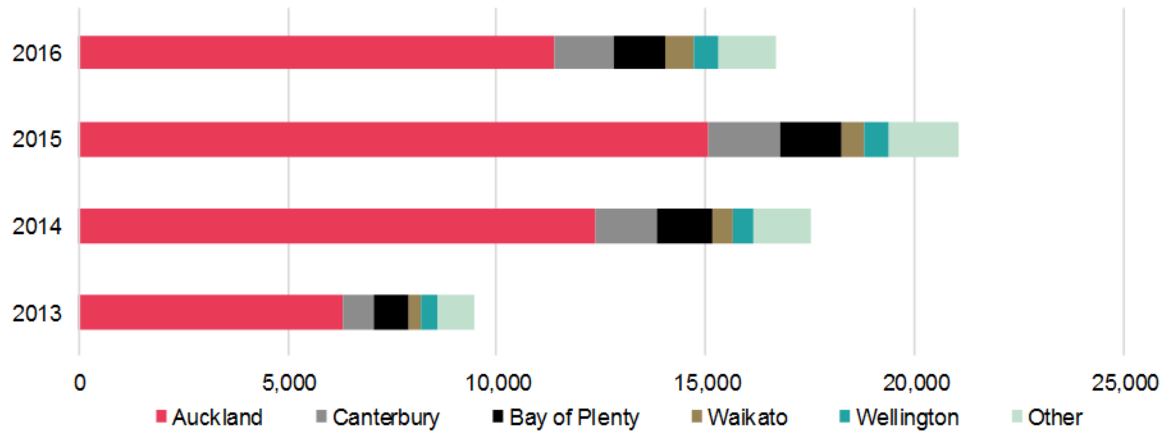
December 2016

FSV for 2016 have dramatically decreased from 2015. The 2016 decrease has been exacerbated due to the inflation of Indian FSV immediately prior to the implementation of Rule 18 in October 2015. The subsequent increased scrutiny of FSV applications by Immigration NZ has decreased the number of successful applications. Indian student numbers are projected to decrease substantially in 2017, possibly as early as the first trimester.

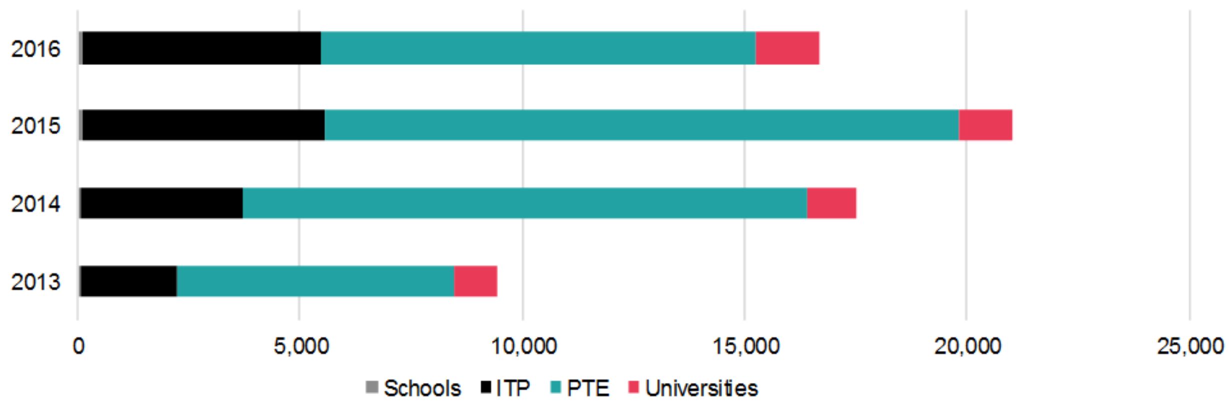
Student visas approved for India 2013-2016



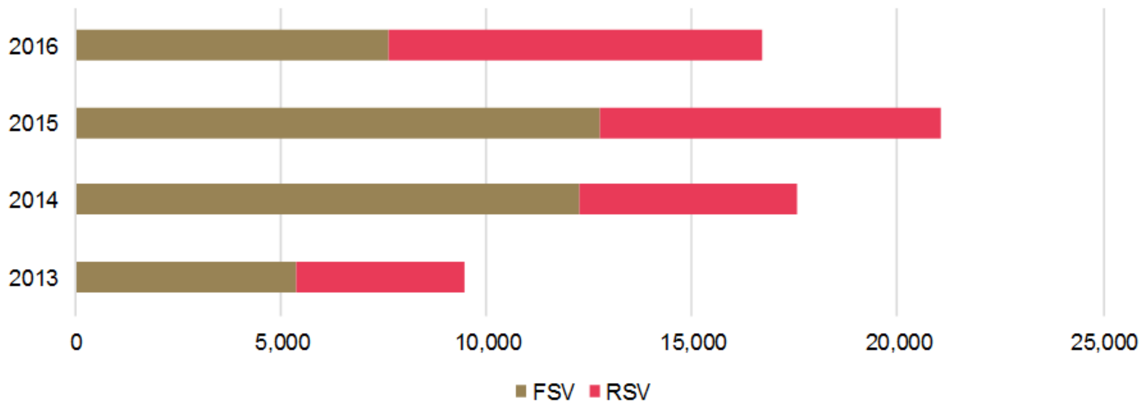
India: TSV by region



Sector breakdown for TSV for India 2016



India : Cumulative total for RSV and FSV, 2014-2016



16,698	Visas issued in 2016 compared to an average of the previous three years	RSV	3,227 ↑	55%	FSV	- 2,537 ↓	-25%	TSV	690 ↑	4%
766	Visas issued in December 2016 compared to previous two Decembers	RSV	- 29 ↓	-12%	FSV	- 375 ↓	-40%	TSV	- 404 ↓	-35%

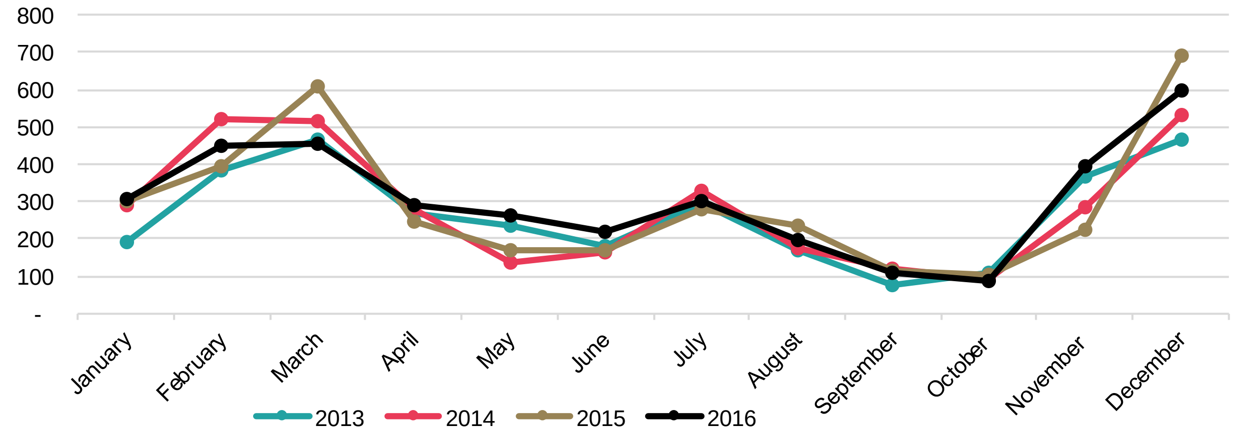
NEW ZEALAND IMMIGRATION

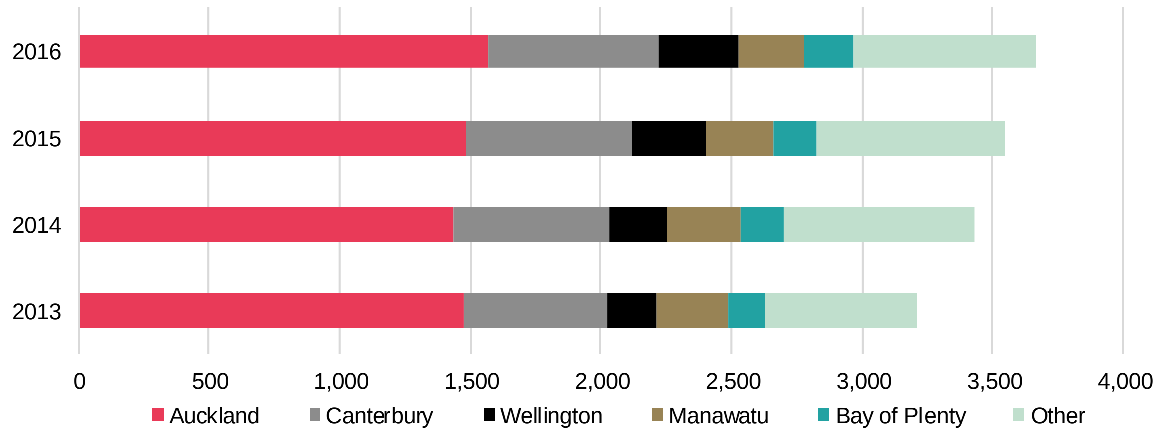
ThinkNew NEW ZEALAND

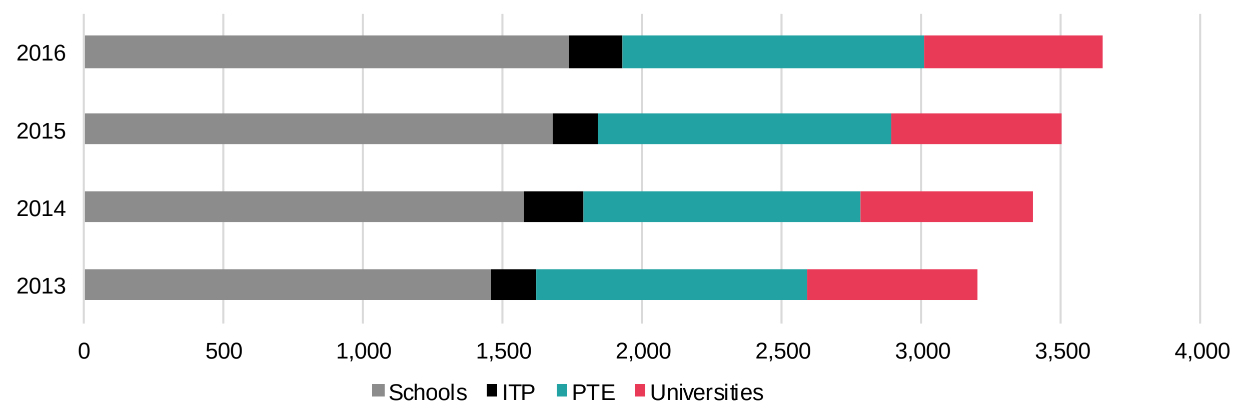
Japan

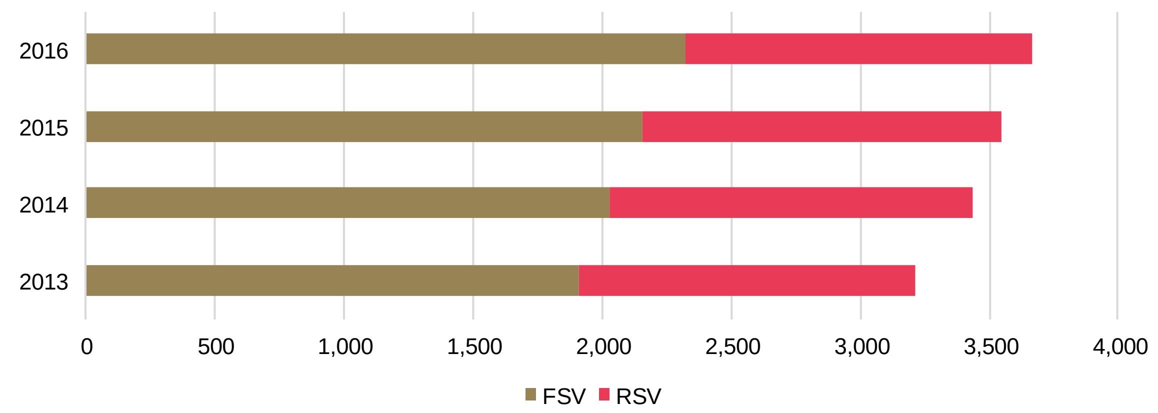
December 2016

Japan TSV for 2016 are up 8% compared to an average of the previous three years. FSV have increased by 15% compared to the average of the previous three years, with the PTE, ITP and school sectors experiencing the most growth.









3,664	Visas issued in 2016 compared to an average of the previous three years	RSV	-	27	-2%	FSV		294	15%	TSV		268	8%
596	Visas issued in December 2016 compared to previous two Decembers	RSV		39	29%	FSV	-	54	-11%	TSV	-	15	-2%

NEW ZEALAND IMMIGRATION

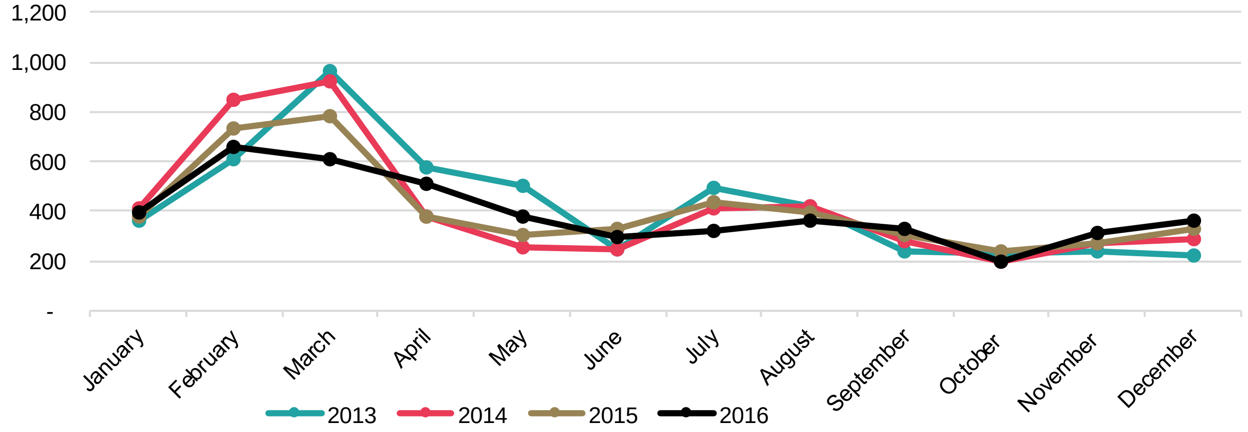
ThinkNew

Korea

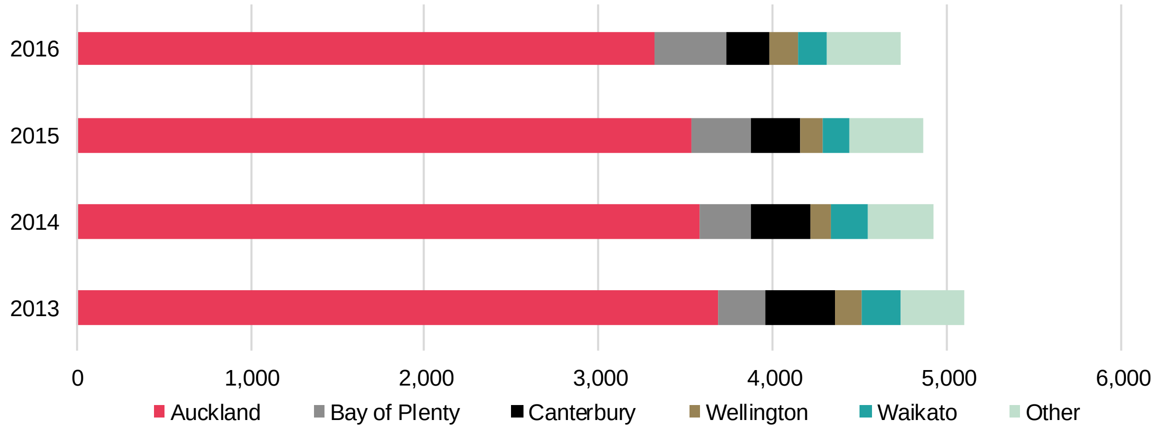
December 2016

The Korean market has been declining for a number of years due to less than favourable economic conditions, coupled with an increase in the quality of Korean education. Korean FSV for 2016 are up 7%(+145) compared to 2015. FSVs are up 11% compared to the previous three years with secondary schools experiencing the largest increase, followed by the PTE sector. Korean FSV for 2016 were the highest since 2012.

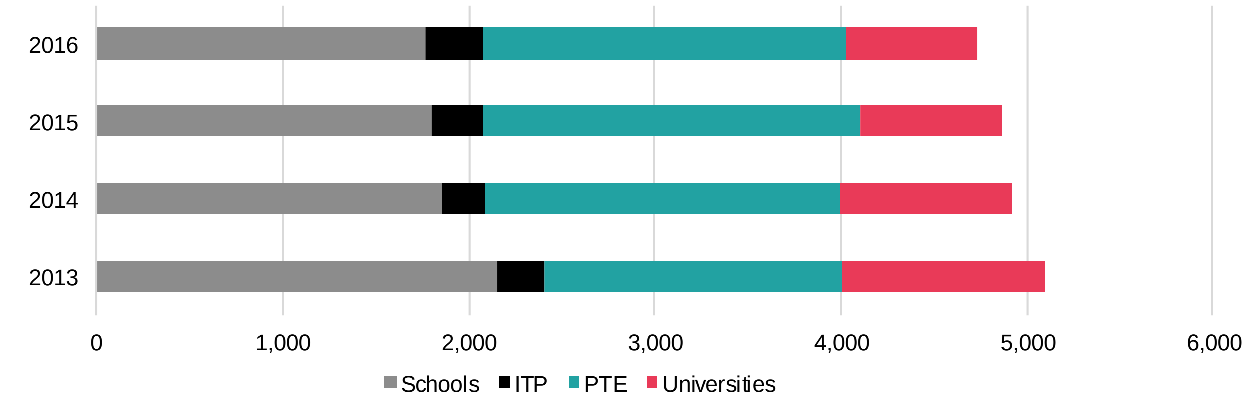
Student visas approved for Korea 2013-2016



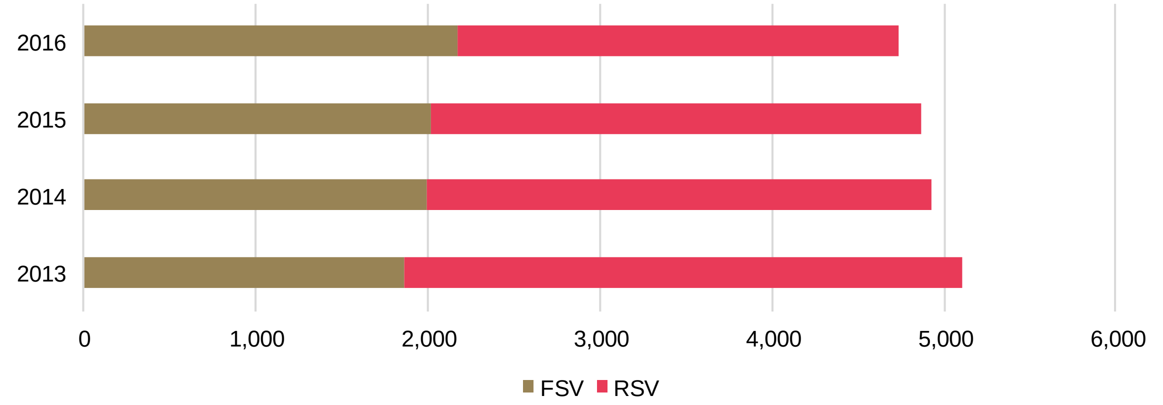
Korea: TSV by region



Sector breakdown for TSV for Korea 2016



Korea : Cumulative total for RSV and FSV, 2014-2016

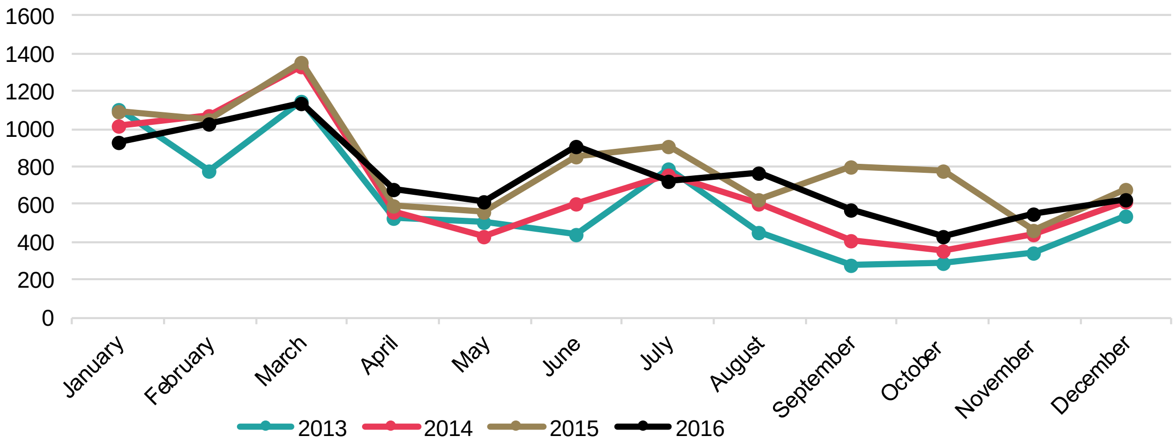


4,731	Visas issued in 2016 compared to an average of the previous three years	RSV	-	442	-15%	FSV	210	11%	TSV	- 232	-5%
364	Visas issued in December 2016 compared to previous two Decembers	RSV		25	23%	FSV	34	17%	TSV	59	19%

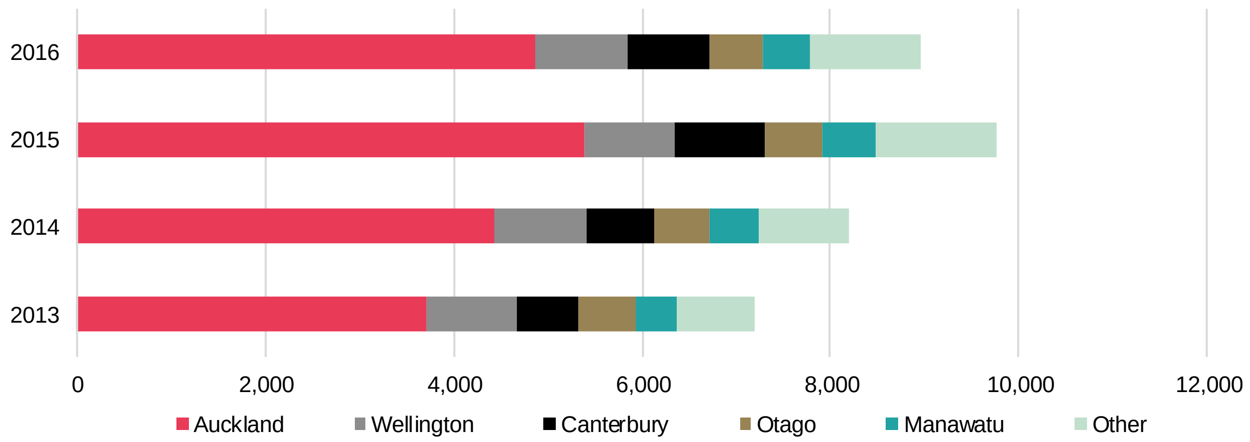
South East Asia December 2016

South East Asian TSV for 2016 are up 7% compared to an average of the previous three years. There was an 8% decrease in TSV from 2015 to 2016. This was mainly driven by a decrease in visas issued to Filipino students studying in PTE.

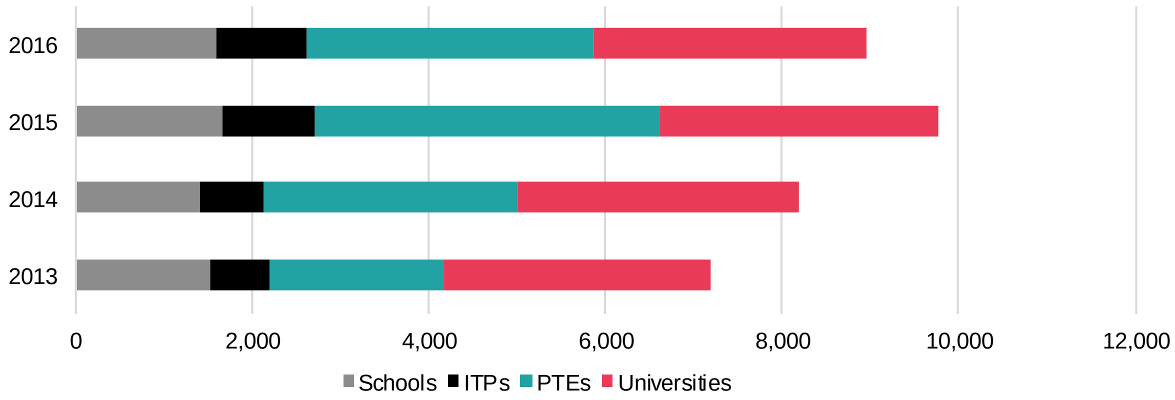
South East Asia: TSVs issued in 2013-2016



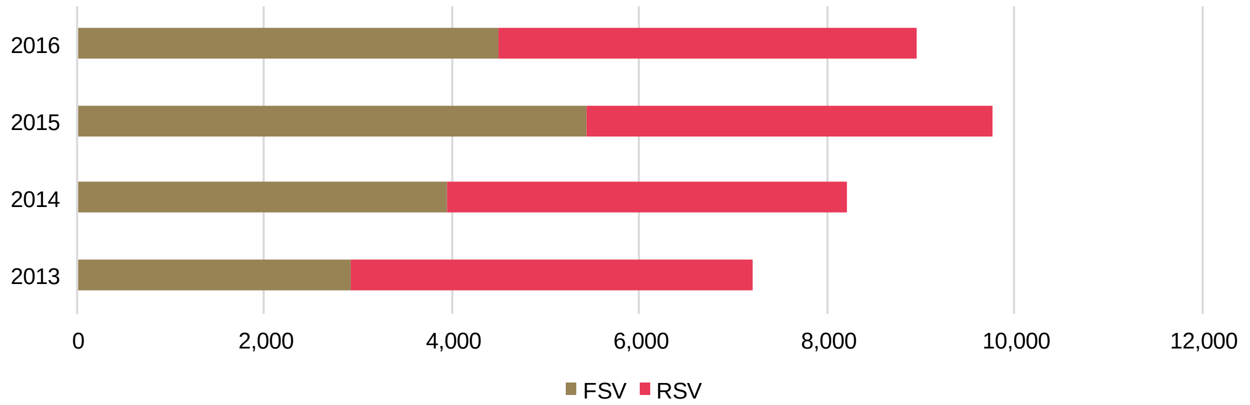
South East Asia: TSVs by region



South East Asia: Sector breakdown for 2013-2016



South East Asia : Cumulative total for RSVs and FSVs, 2014-2016



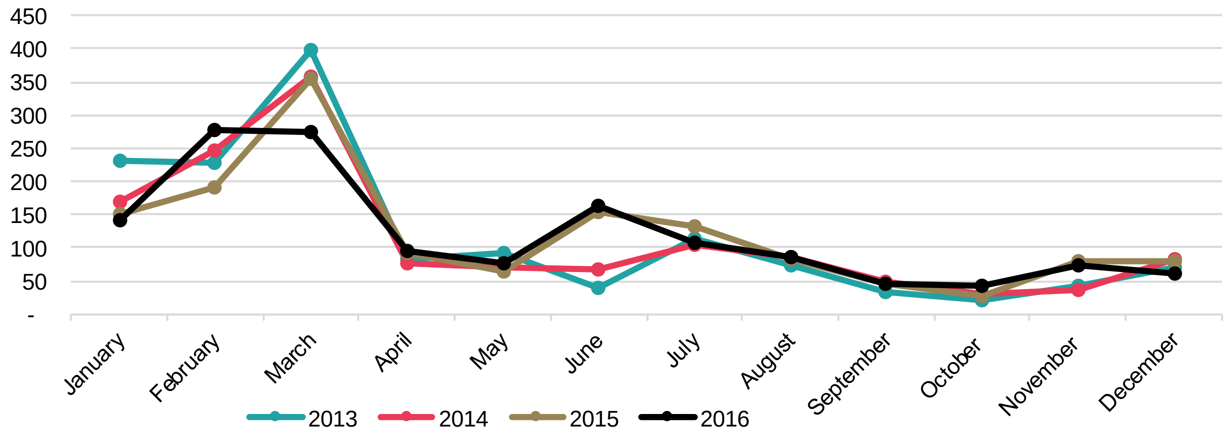
8,963	**Visas issued in 2016 compared to an average of the previous three years**	**RSV**	178 ↑	4%	**FSV**	391 ↑	10%	**TSV**	569 ↑	7%
623	**Visas issued December 2016 compared to previous two Decembers**	**RSV**	19 ↑	8%	**FSV -**	45 ↓	-11%	**TSV -**	26 →	-4%

Malaysia

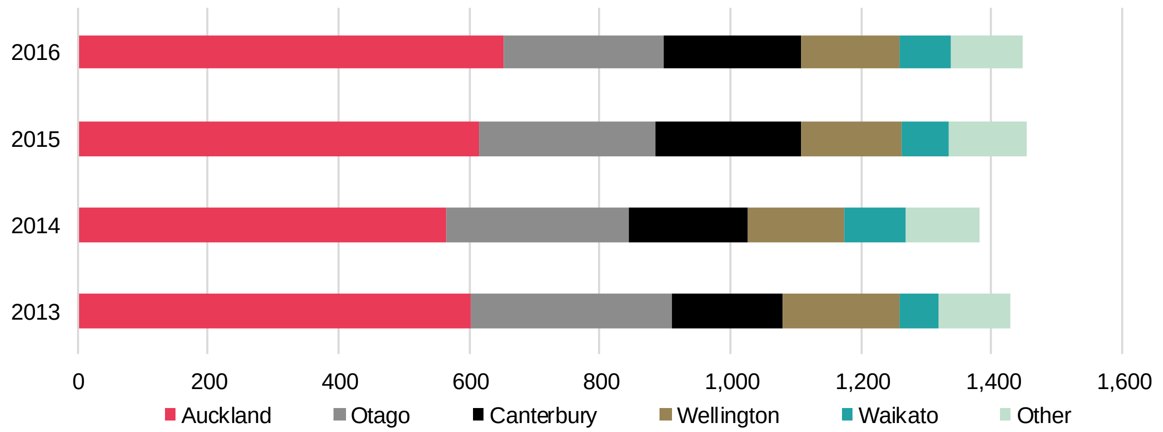
December 2016

Malaysian FSV increased by 16%(+91) from 2015 to 2016. However, compared to the previous three years, TSV showed little change (+2%, +25). Over 70% of Malaysian students study in universities, but the PTE sector has been leading the increases since 2013.

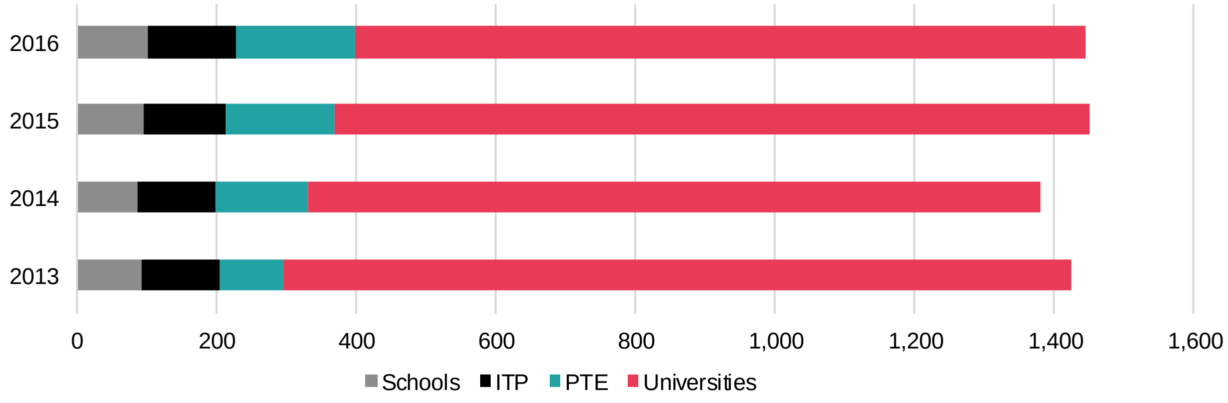
Student visas approved for Malaysia 2013-2016



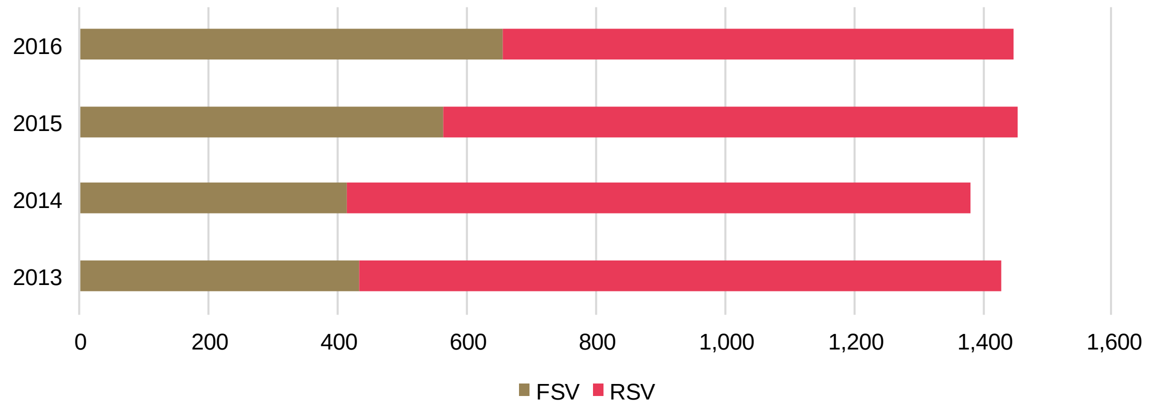
Malaysia: TSV by region



Sector breakdown for TSV for Malaysia 2016



Malaysia : Cumulative total for RSV and FSV, 2014-2016



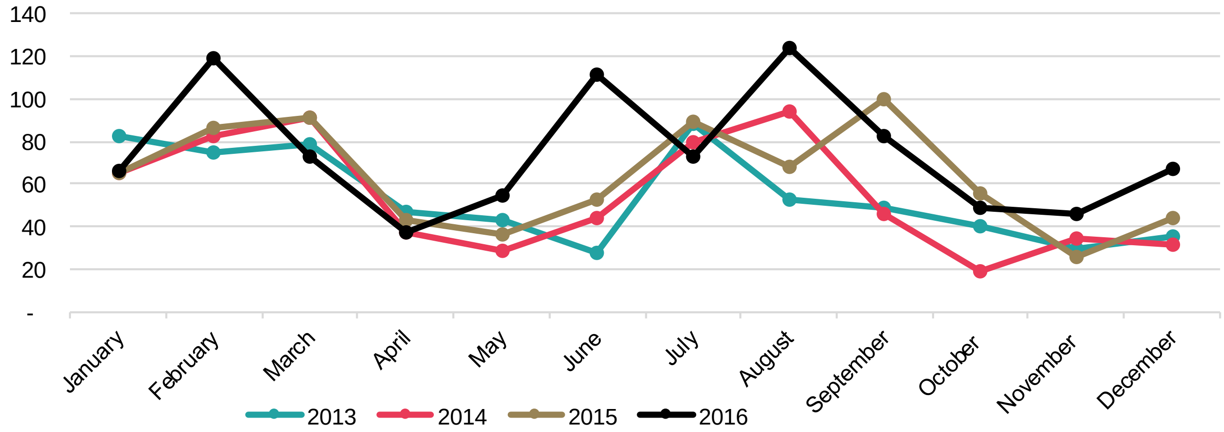
1,446	Visas issued in 2016 compared to an average of the previous three years	RSV	-	159	-17%	FSV		184	39%	TSV	25	2%
60	Visas issued in December 2016 compared to previous two Decembers	RSV	-	6	-27%	FSV	-	16	-26%	TSV	- 22	-26%

Indonesia

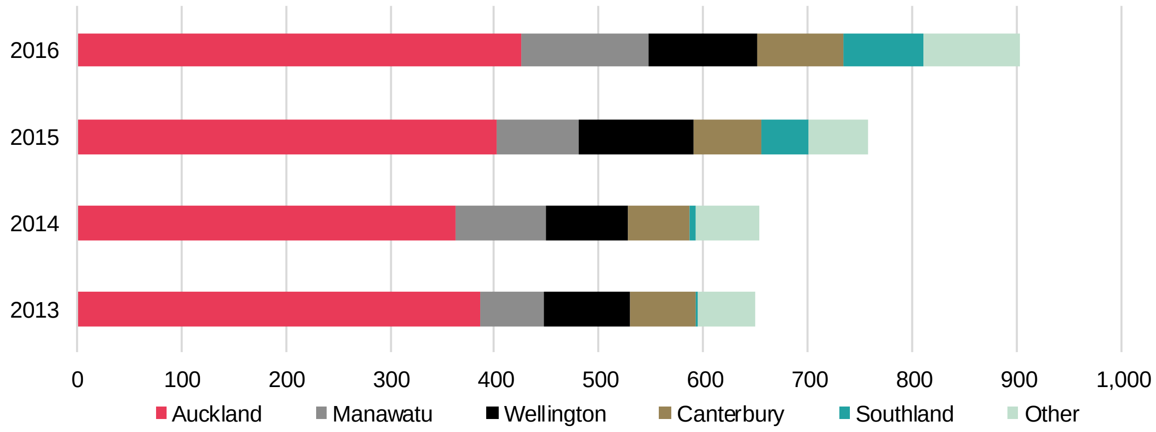
December 2016

Indonesian TSV increased by 19% from 2015 to 2016. Compared to the previous three years, TSV increased by 31%. Most of this increase has been in the PTE sector, followed by the ITP sector. The Southland, Auckland and Manawatu regions have led the TSV increase

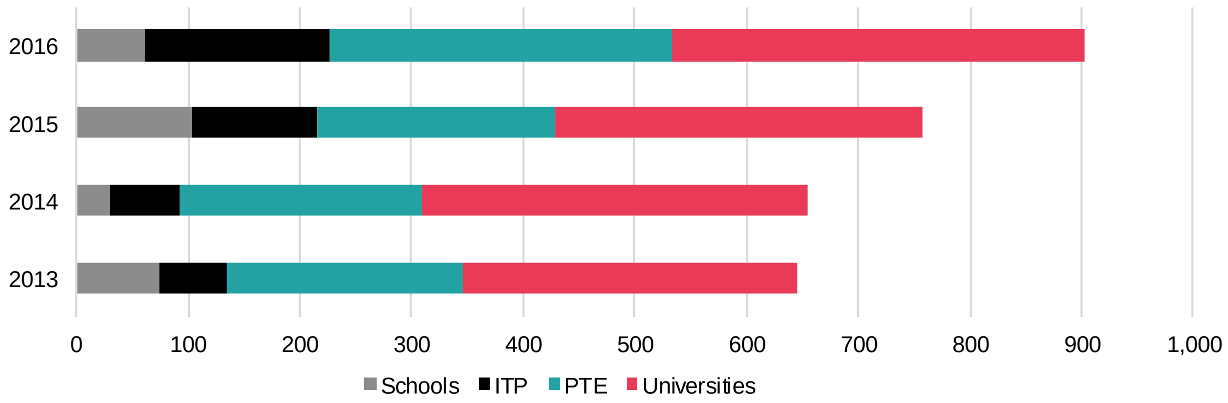
Student visas approved for Indonesia 2013-2016



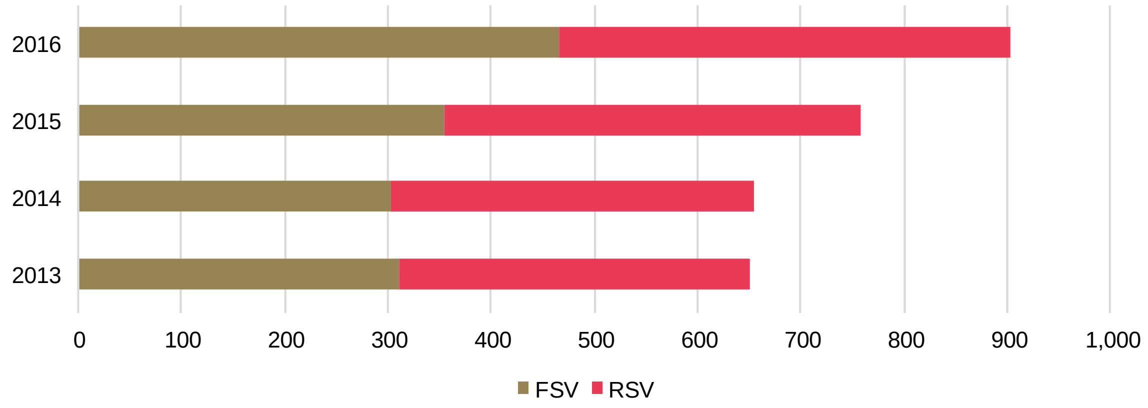
Indonesia: TSV by region



Sector breakdown for TSV for Indonesia 2016



Indonesia : Cumulative total for RSV and FSV, 2014-2016



903	Visas issued in 2016 compared to an average of the previous three years	RSV	73 ↑	20%	FSV	143 ↑	44%	TSV	216 ↑	31%
67	Visas issued in December 2016 compared to previous two Decembers	RSV	10 ↑	66%	FSV	20 ↑	83%	TSV	29 ↑	76%

NEW ZEALAND IMMIGRATION

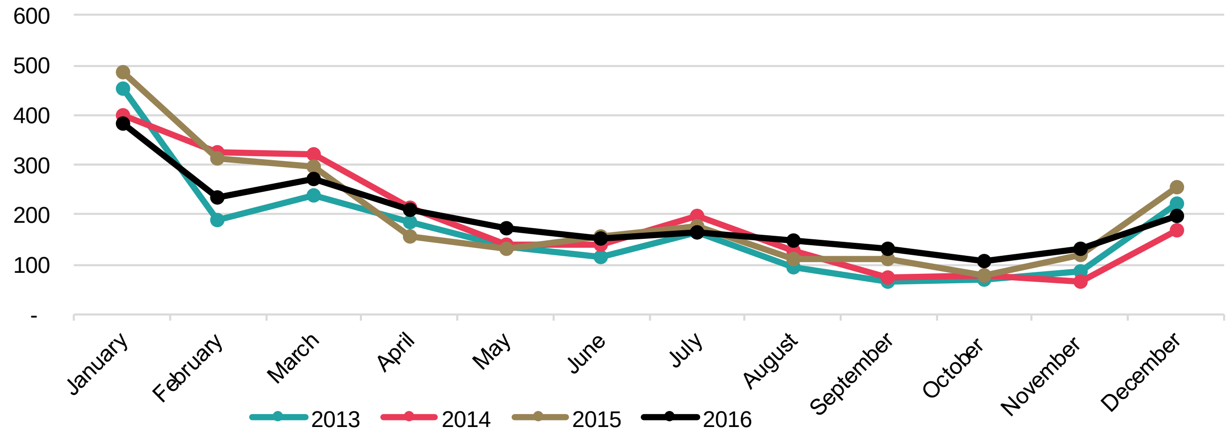
ThinkNew

Thailand

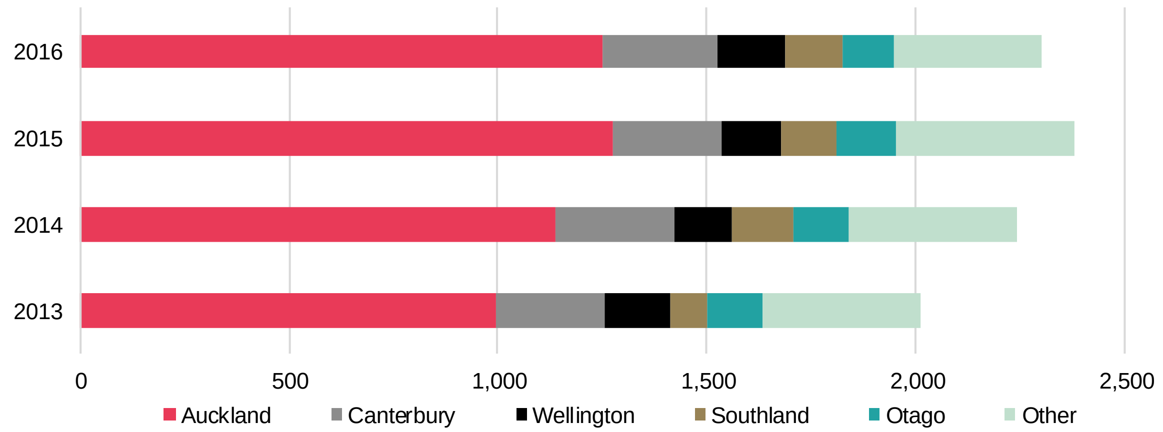
December 2016

TSV for Thailand have showed a little growth. In 2016, TSV increased by 4% when compared to an average of the previous three years. However, they declined by 3% when compared to 2015 alone. The schools sector has seen the most visa decline, while visas for PTE have increased.

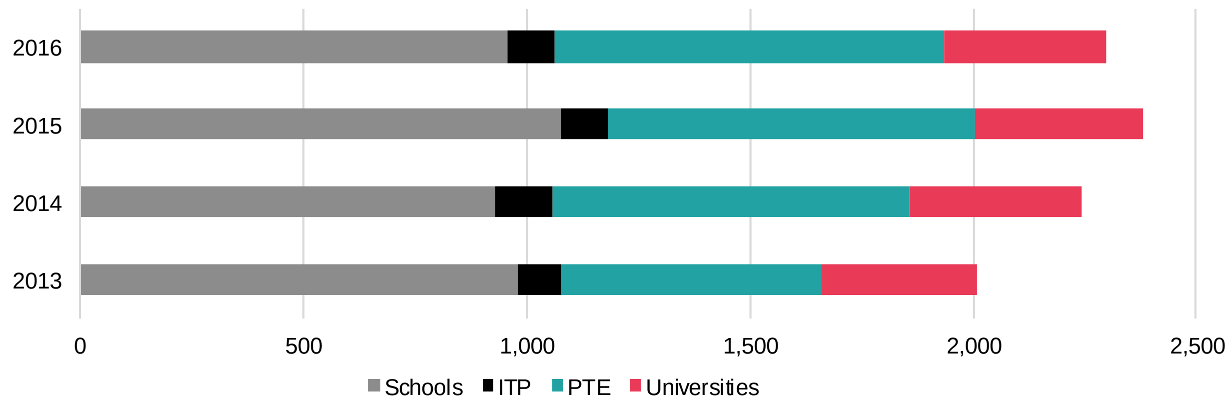
Student visas approved for Thailand 2013-2016



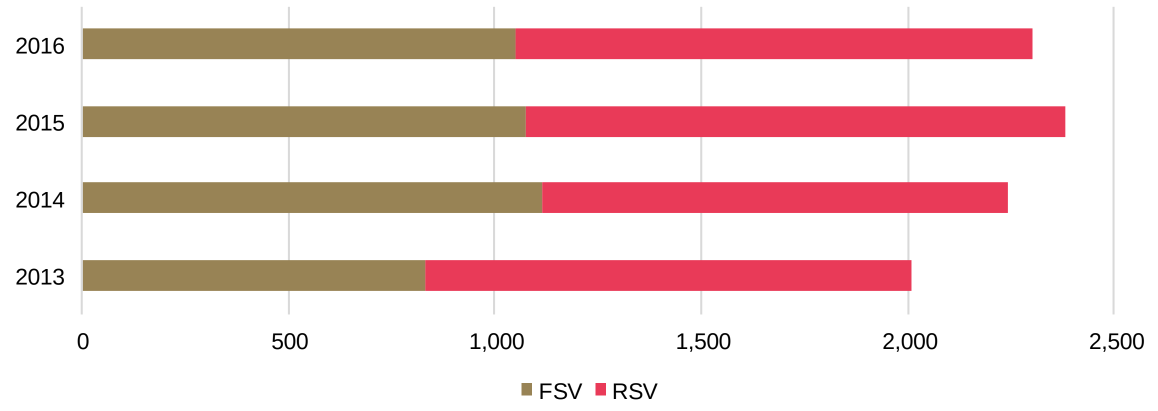
Thailand: TSV by region



Sector breakdown for TSV for Thailand 2016



Thailand : Cumulative total for RSV and FSV, 2014-2016



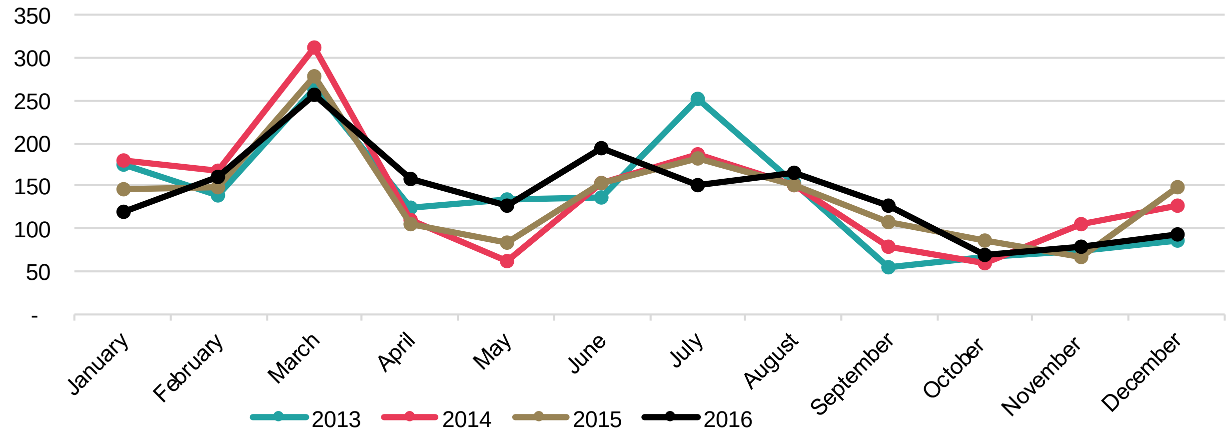
2,300	**Visas issued in 2016 compared to an average of the previous three years**	**RSV**	43	4%	**FSV**	46	5%	**TSV**	89	4%
199	**Visas issued in December 2016 compared to previous two Decembers**	**RSV**	7	5%	**FSV**	- 19	-21%	**TSV**	- 12	-6%

Viet Nam

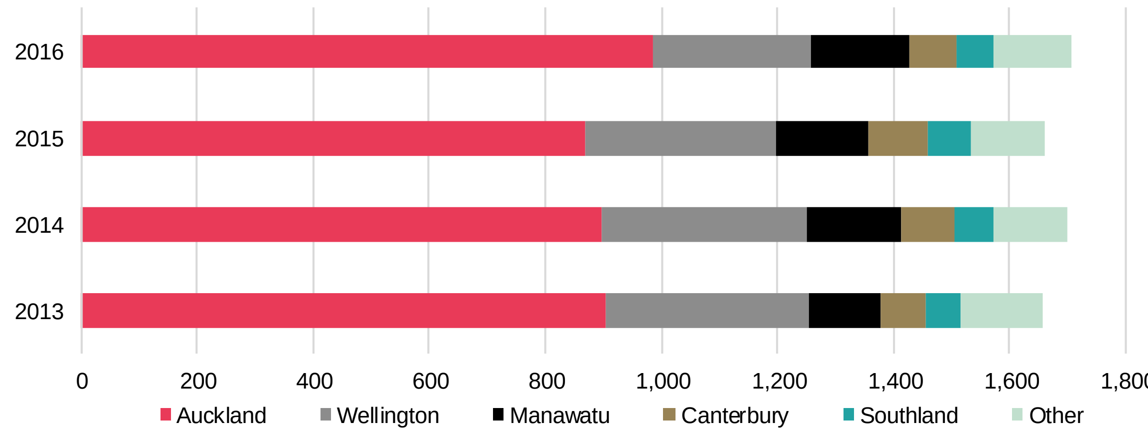
December 2016

TSV for Viet Nam have slightly decreased. In 2016, they decreased by 2% when compared to an average of the previous three years. However, TSV increased by 3% compared to 2015 alone. Since 2015, visas issued for the universities sector have decreased, and visas issued for the Wellington region have decreased, but visas for study in Auckland have increased since 2015.

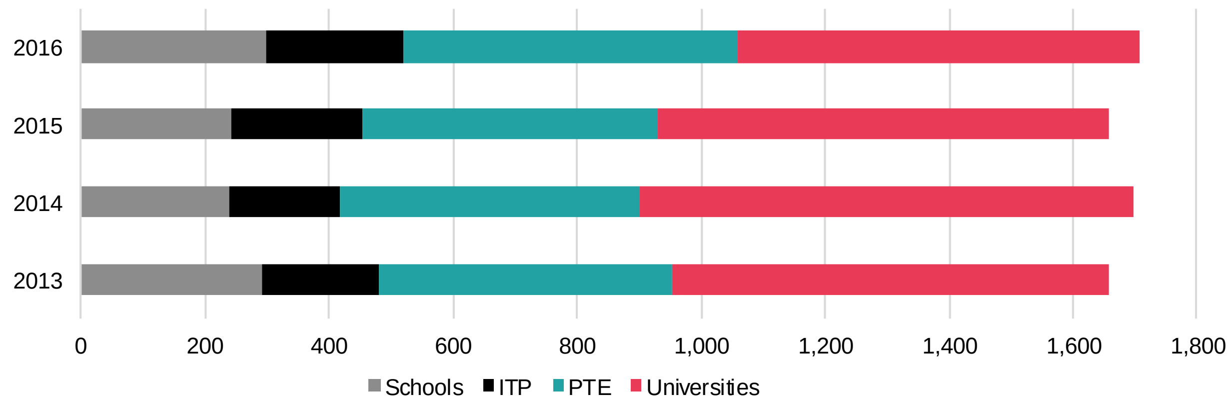
Student visas approved for Viet Nam 2013-2016



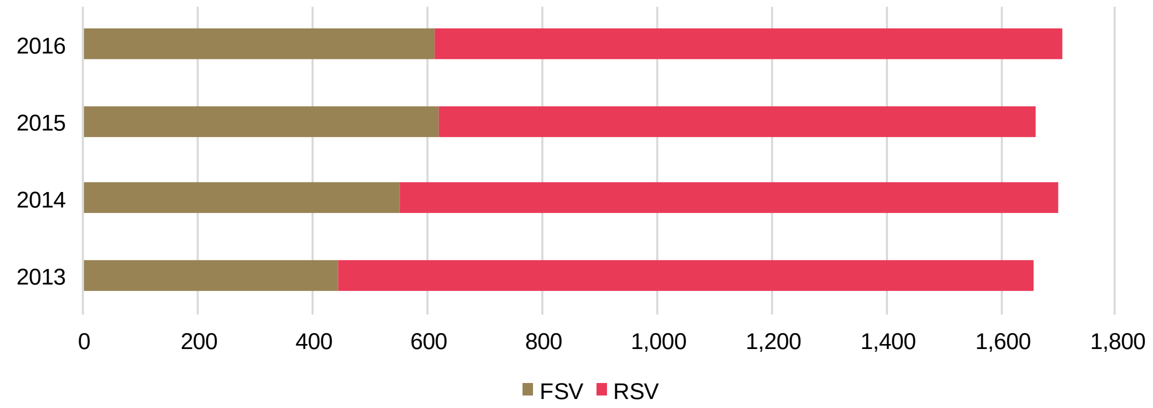
Viet Nam: TSV by region



Sector breakdown for TSV for Viet Nam 2016



Viet Nam : Cumulative total for RSV and FSV, 2014-2016

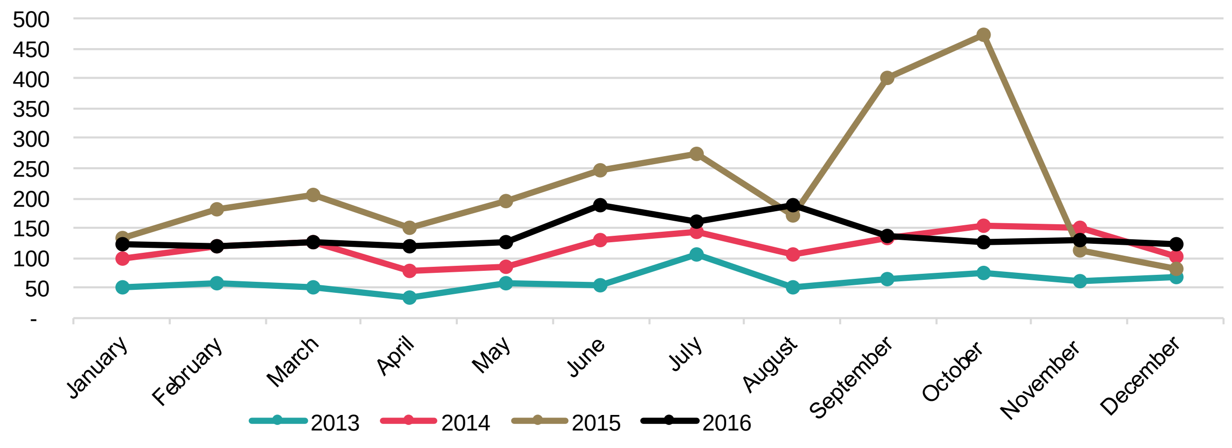


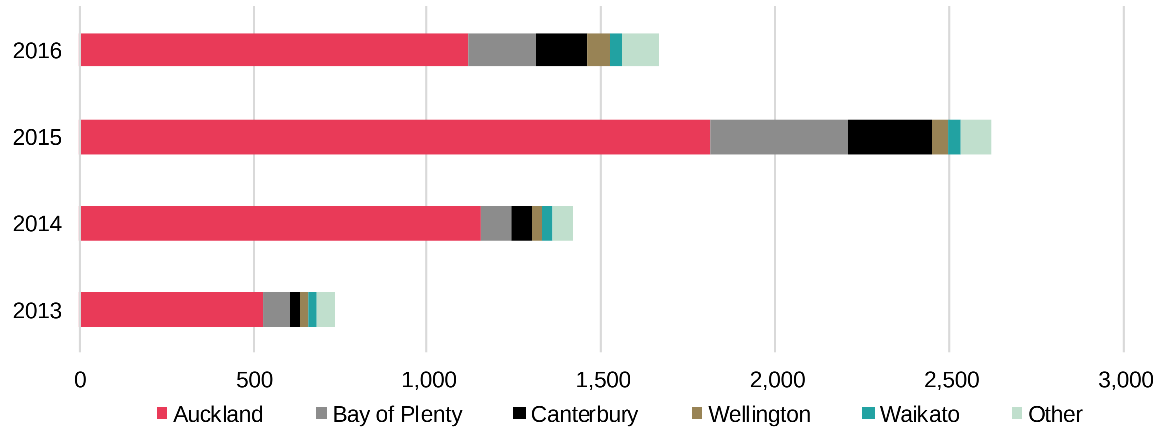
1,706	Visas issued in 2016 compared to an average of the previous three years	RSV	- 40	-4%	FSV	75	14%	TSV	34	2%
94	Visas issued in December 2016 compared to previous two Decembers	RSV	- 12	-24%	FSV	- 33	-36%	TSV	- 45	-32%

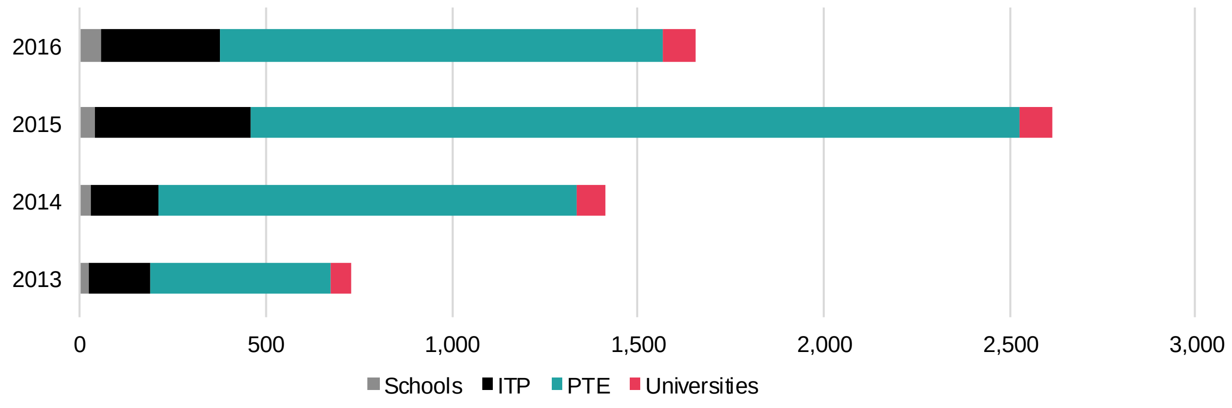
Philippines

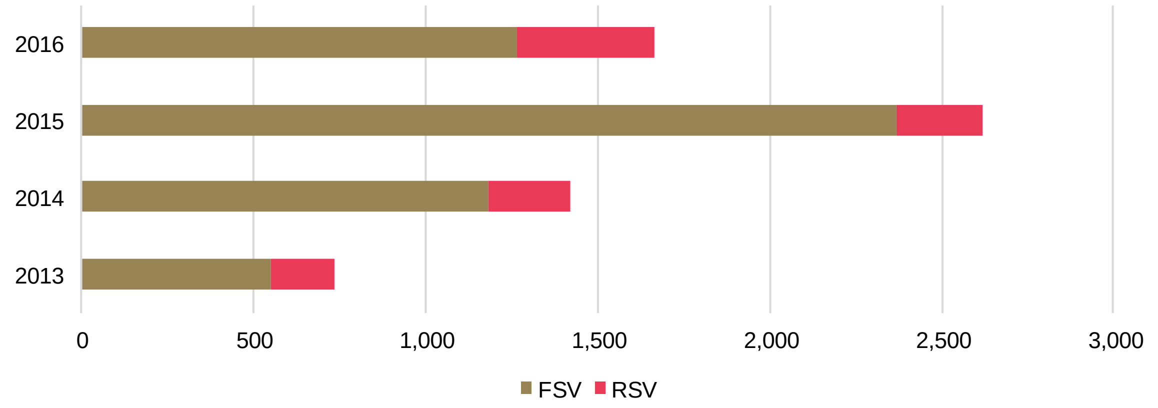
December 2016

TSVs for the Philippines have increased by 5% compared to an average of the previous three years. However, since 2015, the number of TSVs for the Philippines has decreased by 36%. This was the result of the change to Rule 18, which impacted on visas issued to PTE students. The spike before this rule was re-implemented in late 2015 can clearly be seen in the top left graph, which means that the decrease in visas from 2015 to 2016 being more pronounced.









1,668	Visas issued in 2016 compared to an average of the previous three years	RSV	179	80%	FSV	-	103	-8%	TSV	76	5%
123	Visas issued in December 2016 compared to previous two Decembers	RSV	12	121%	FSV		20	24%	TSV	32	34%

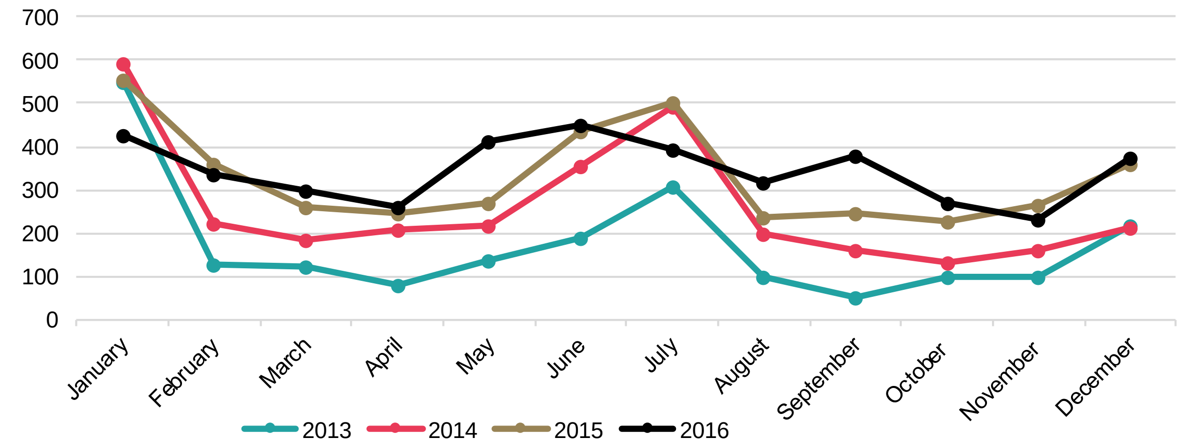
NEW ZEALAND IMMIGRATION

ThinkNew

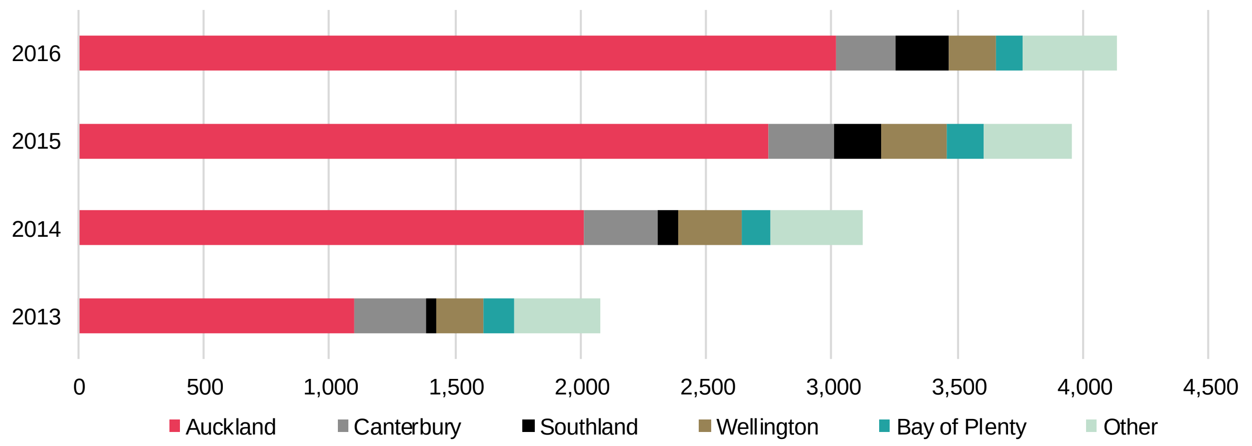
Latin America December 2016

Latin America TSV for 2016 are up by 5% compared to 2015. TSV have increased by 36% compared to the previous three years. Most of the growth has been in the PTE and it has been centred in the Auckland region.

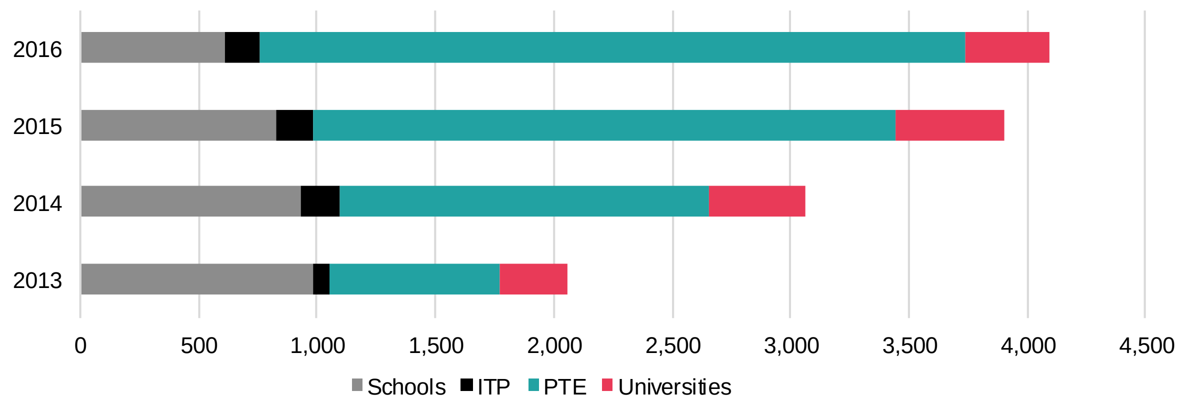
Latin America: TSV issued in 2013-2016



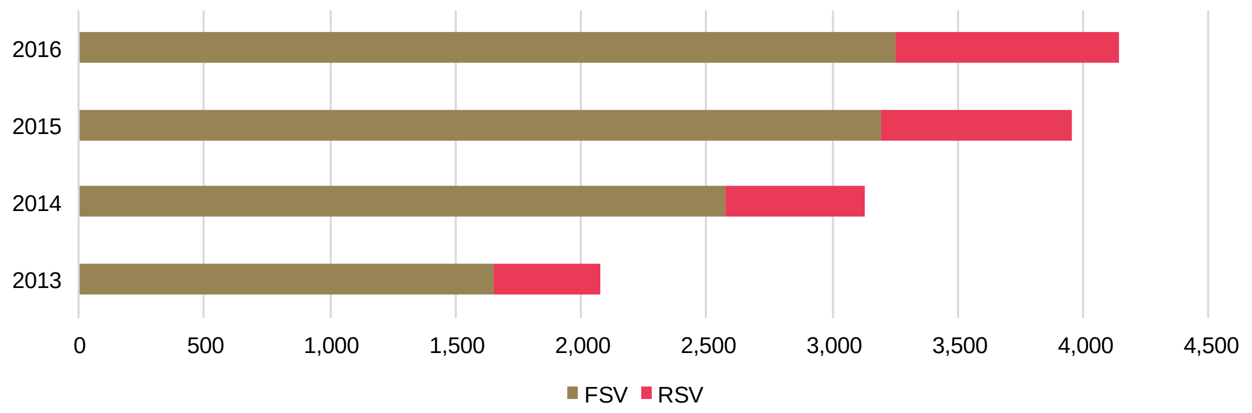
Latin America: TSV by region



Latin America: Sector breakdown for 2013-2016



Latin America : Cumulative total for RSV and FSV, 2014-2016



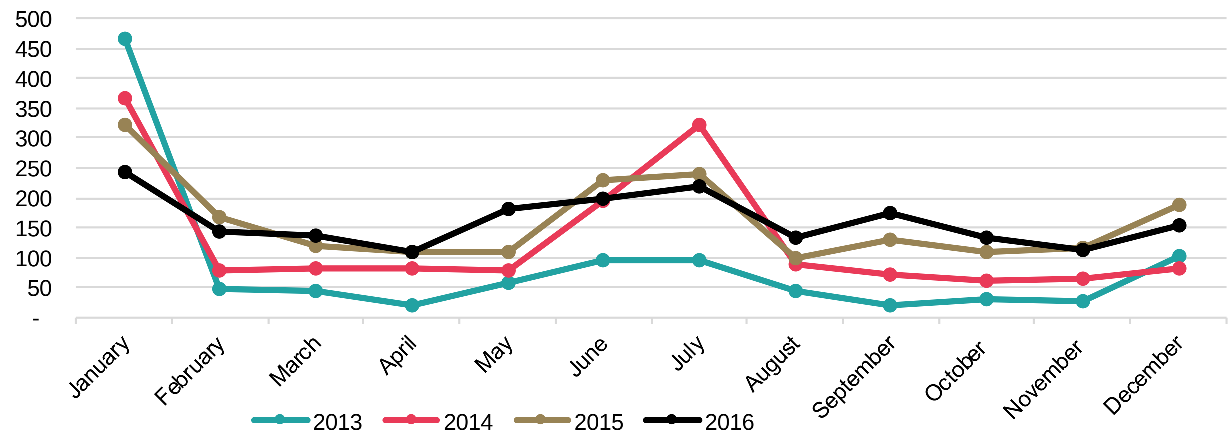
4,137	Visas issued in 2016 compared to an average of the previous three years	RSV	309	↑	54%	FSV	777	↑	31%	TSV	1,086 ↑ 36%
372	Visas issued in December 2016 compared to previous two Decembers	RSV	10	↑	21%	FSV	77	↑	32%	TSV	87 ↑ 30%

Brazil

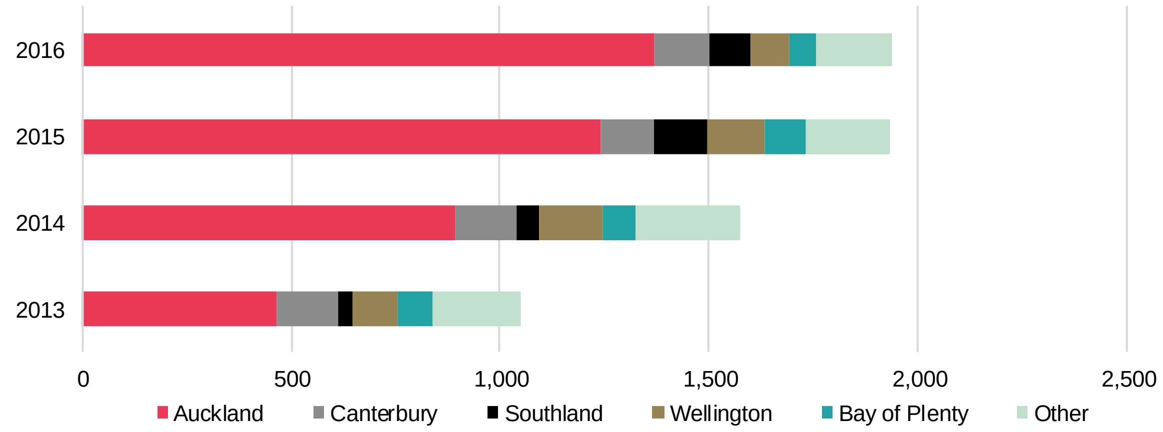
December 2016

Brazilian TSV have increased by 27% in 2016 when compared to an average of the previous three years. Brazilian FSV for 2016 are down 5%(-79) compared to 2015. However, TSV are up 19% compared to the previous three years (+249), with the PTE (+86%, +512) sector showing growth.

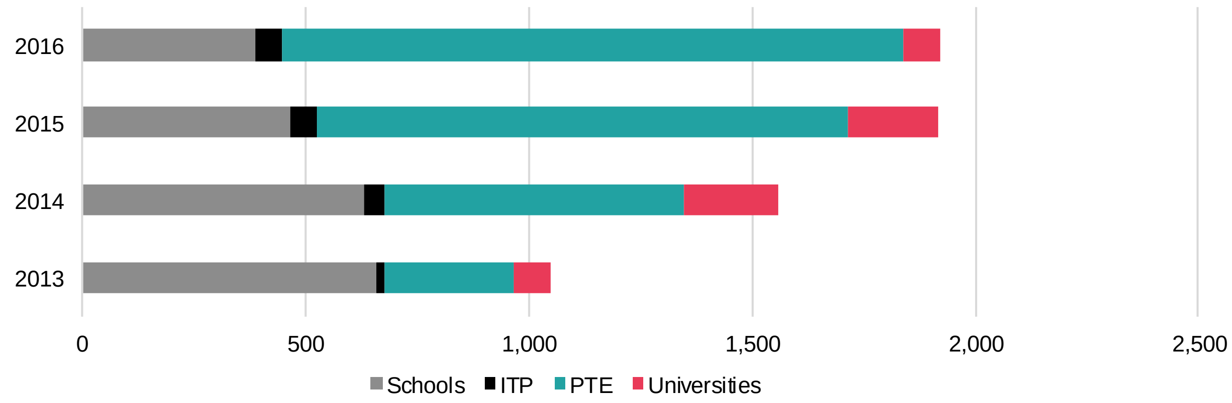
Student visas approved for Brazil 2013-2016



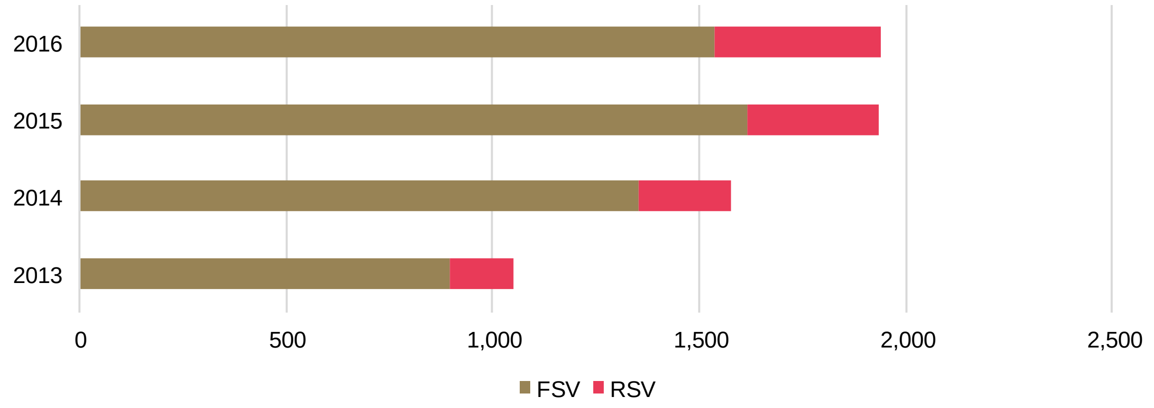
Brazil: TSV by region



Sector breakdown for TSV for Brazil 2016



Brazil : Cumulative total for RSV and FSV, 2014-2016



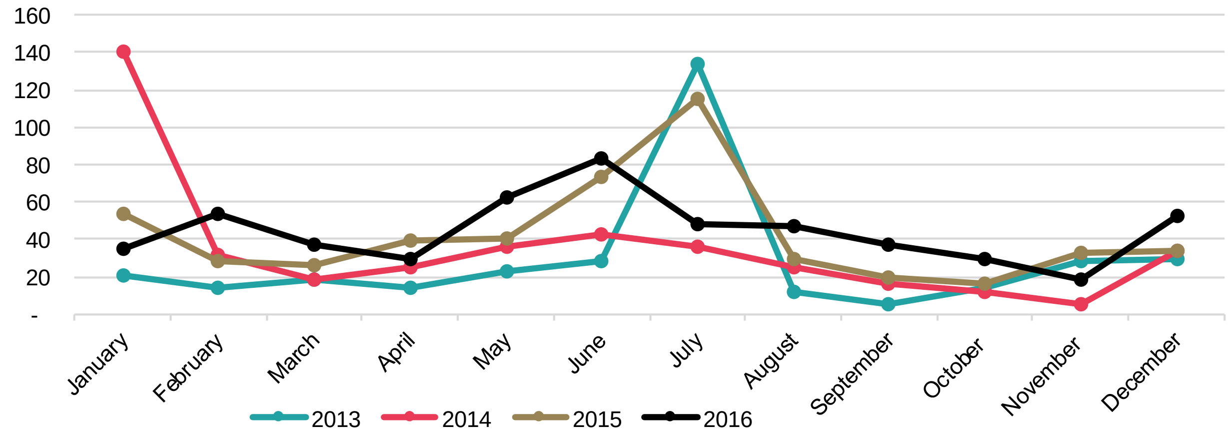
1,937	Visas issued in 2016 compared to an average of the previous three years	RSV	168 ↑	72%	FSV	249 ↑	19%	TSV	416 ↑	27%
154	Visas issued in December 2016 compared to previous two Decembers	RSV	7 ↑	42%	FSV	12 ↑	10%	TSV	19 ↑	14%

Chile

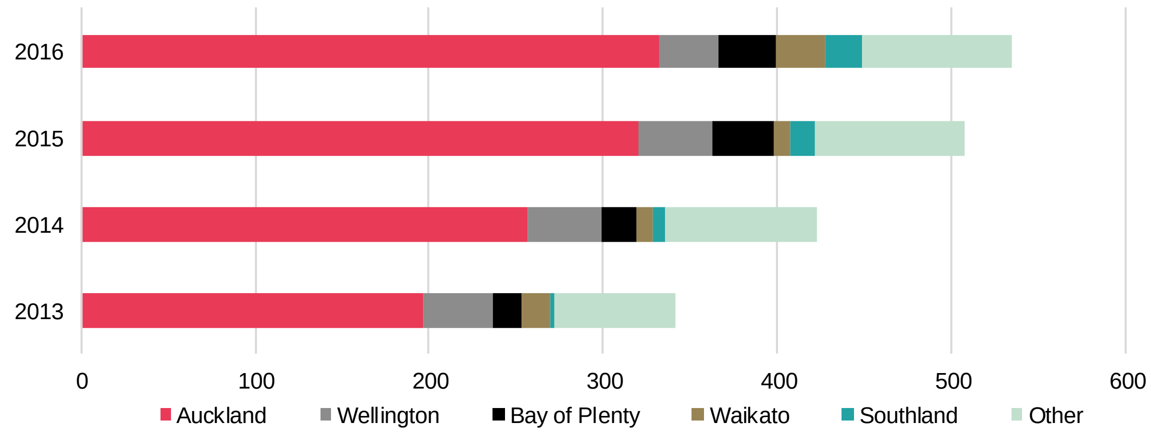
December 2016

Chilean TSV for 2016 are down 5% compared to 2016. They increased by 26% compared to the average of the previous three years. There have been increases in Chilean student visas for study in the Auckland, Waikato and Southland regions. The PTE sector dominates this market, and has increased 118% compared to the average of the previous three years. The number of visas approved for Chilean students in the PTE sector has more than doubled since 2014.

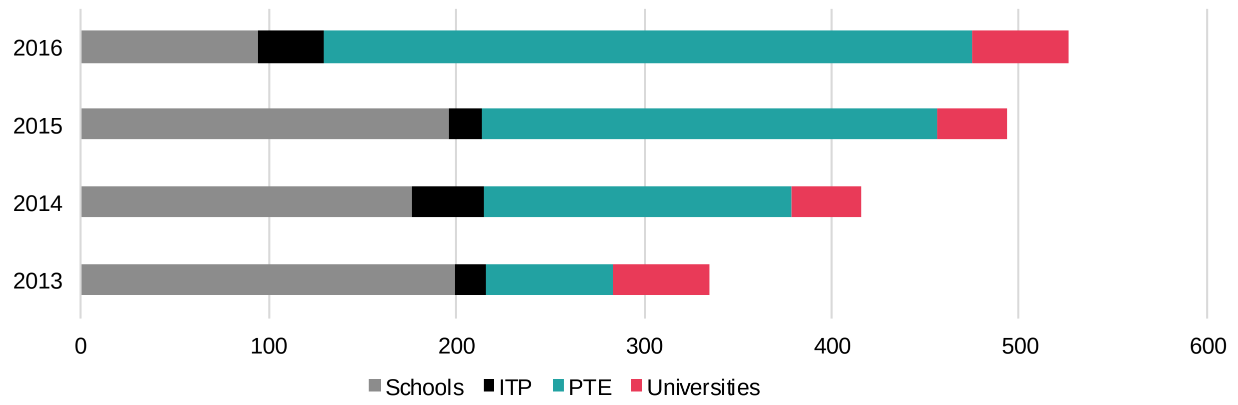
Student visas approved for Chile 2013-2016



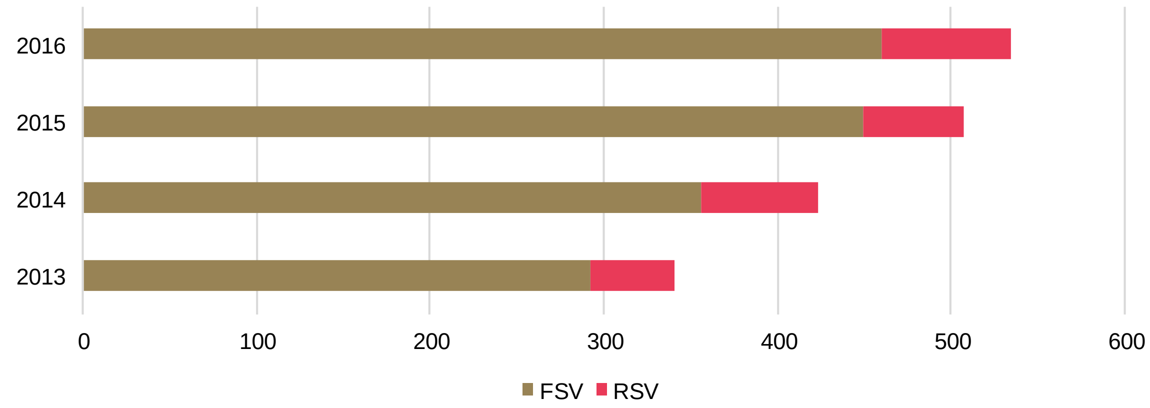
Chile: TSV by region



Sector breakdown for TSV for Chile 2016



Chile : Cumulative total for RSV and FSV, 2014-2016

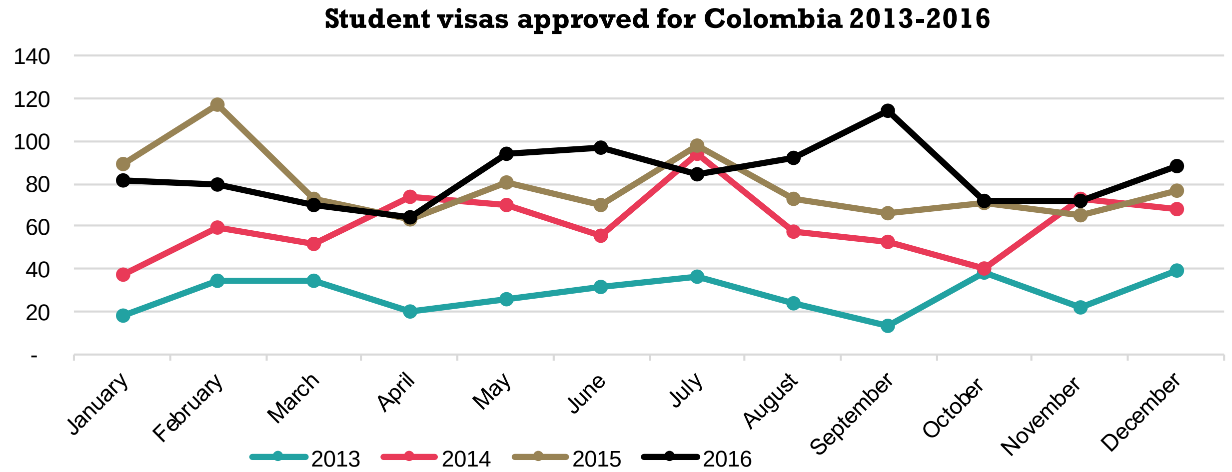


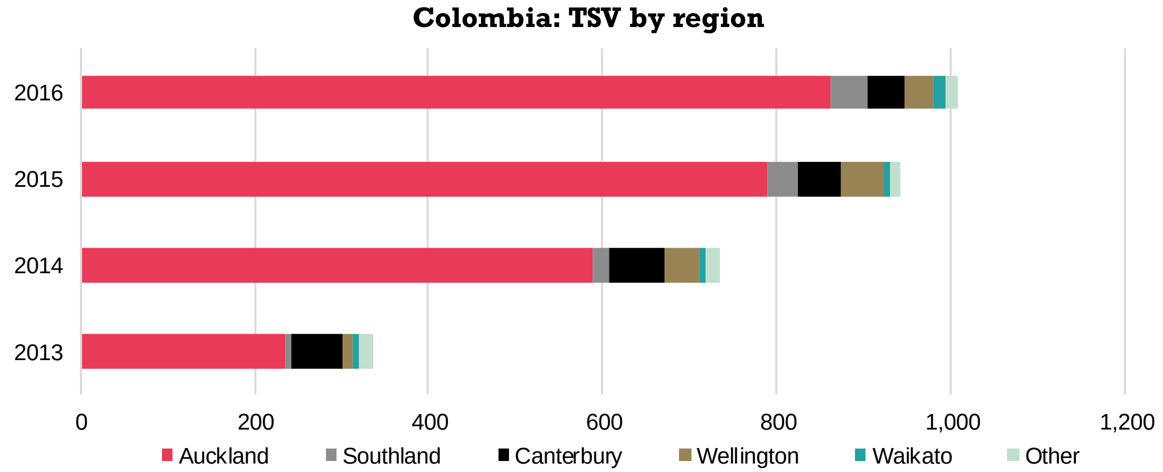
534	**Visas issued in 2016 compared to an average of the previous three years**	**RSV**	**16**	**28%**	**FSV**	**94**	**26%**	**TSV**	**110**	**26%**
53	**Visas issued in December 2016 compared to previous two Decembers**	**RSV**	**- 5**	**-53%**	**FSV**	**24**	**92%**	**TSV**	**19**	**56%**

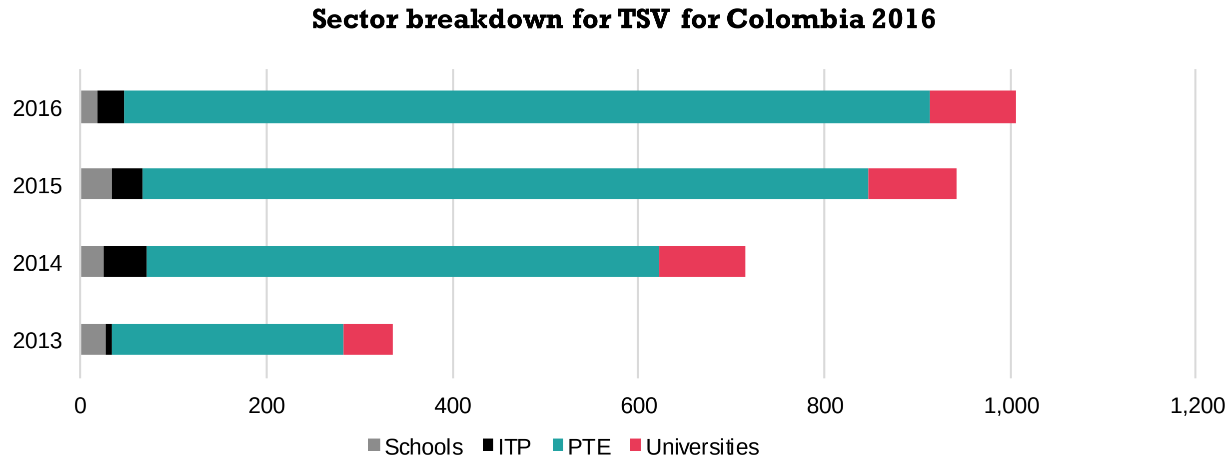
Colombia

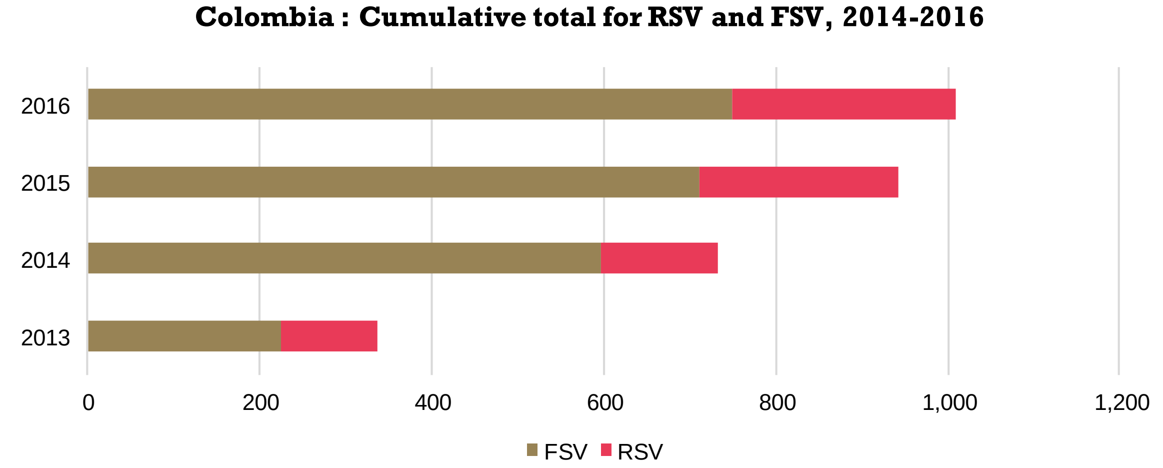
December 2016

Colombian TSV were up 7% in 2016 compared to 2015. Compared to the average of the previous three years, they are up 50% with growth in the PTE (+64%) and universities sectors (+18%) sectors.









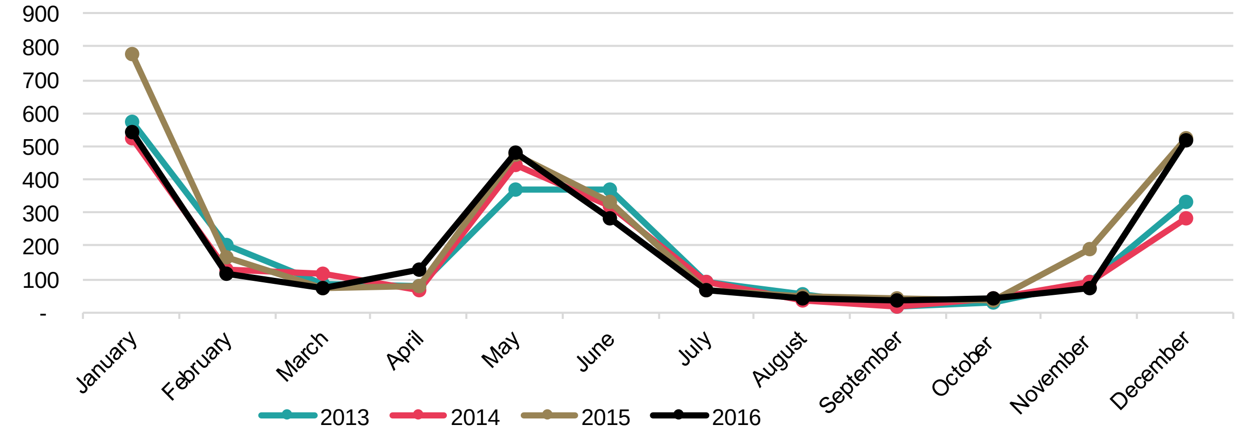
1,009	**Visas issued in 2016 compared to an average of the previous three years**	**RSV**	99	62%	**FSV**	239	47%	**TSV**	338	50%
88	**Visas issued in December 2016 compared to previous two Decembers**	**RSV**	10	71%	**FSV**	6	9%	**TSV**	16	21%

USA

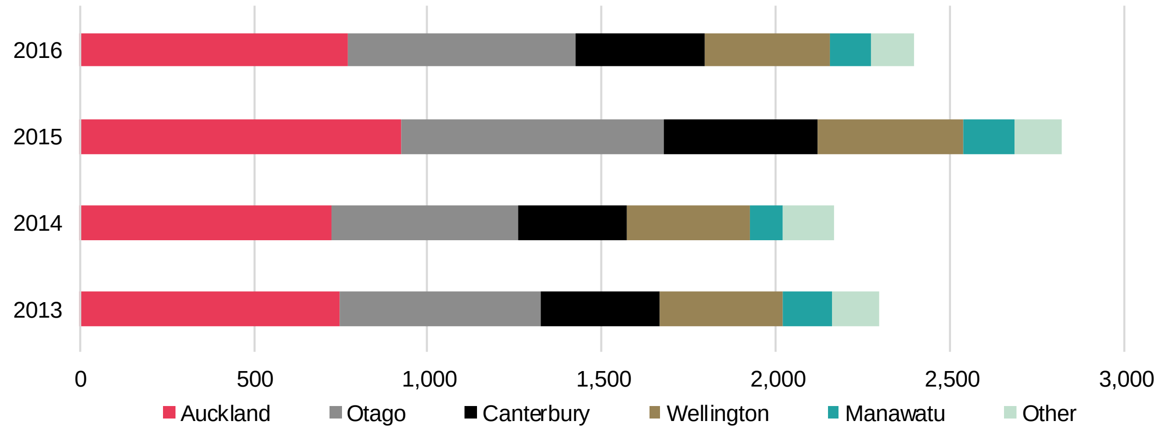
December 2016

USA TSV for 2016 decreased by 15% from 2015. This was due to a processing delay, and was followed by approval spikes for January and December of 2015, which can be seen on the line graph. There was little change from the average of the previous three years (-1%, -32), which is a better indicator for this market.

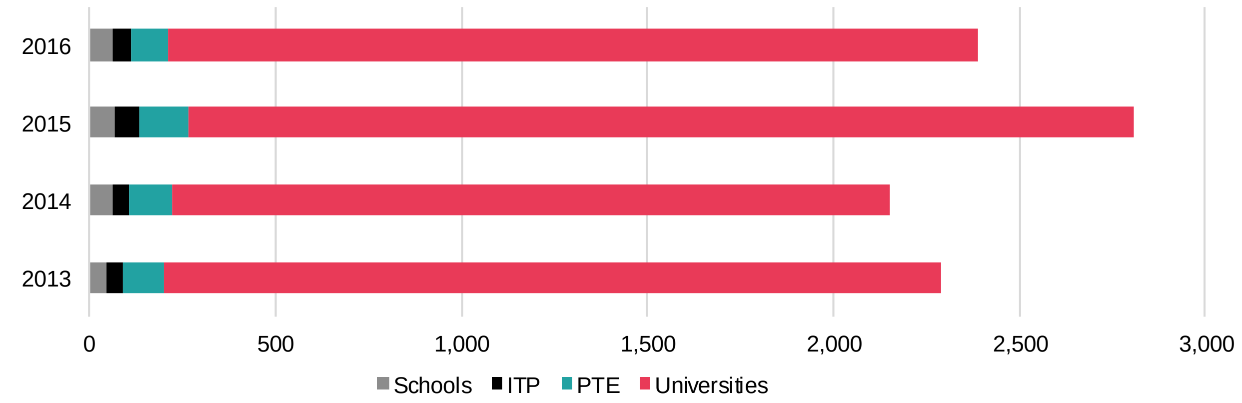
Student visas approved for USA 2013-2016



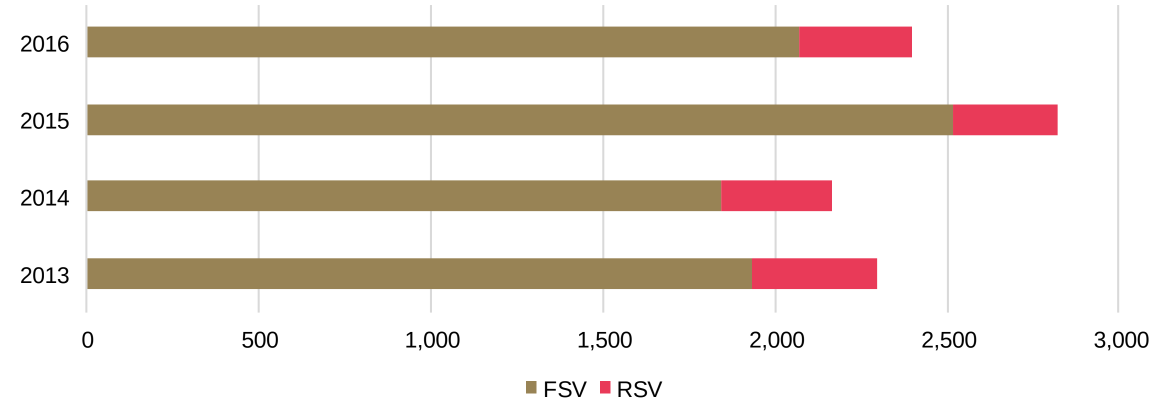
USA: TSV by region



Sector breakdown for TSV for USA 2016



USA : Cumulative total for RSV and FSV, 2014-2016



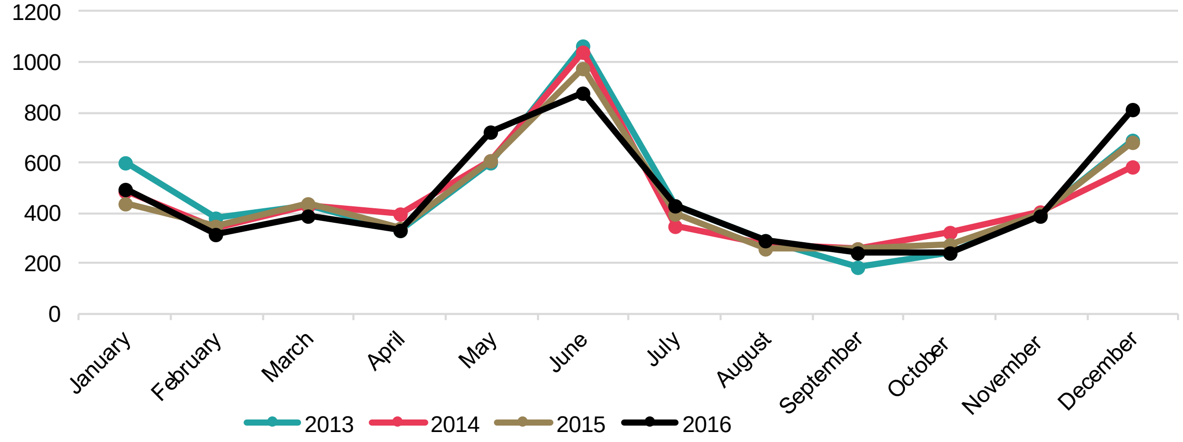
2,397	Visas issued in 2016 compared to an average of the previous three years	RSV	-	3	-1%	FSV	-	29	-1%	TSV	-	32	-1%
518	Visas issued in December 2016 compared to previous two Decembers	RSV		5	43%	FSV		111	28%	TSV		116	29%

Europe

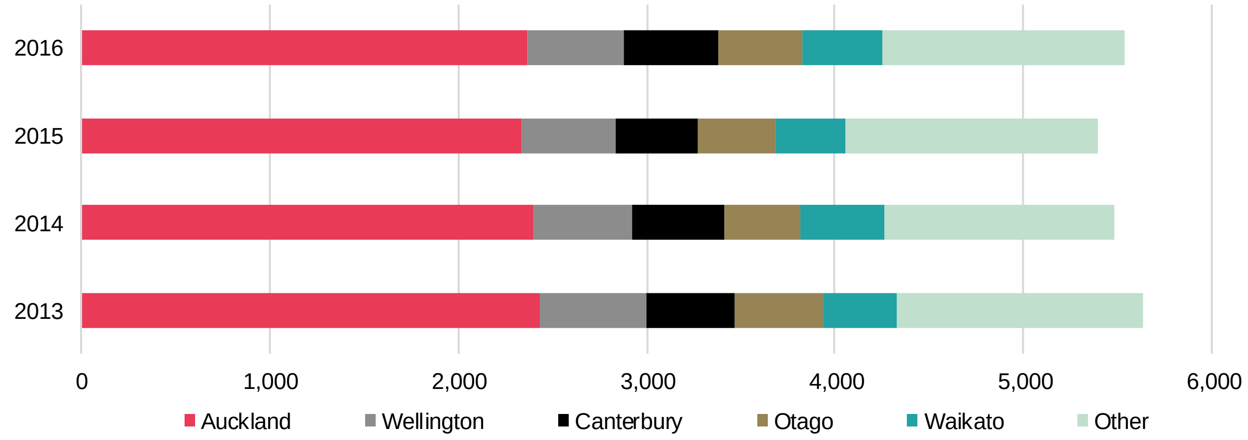
December 2016

European TSV for 2016 were flat, increasing by 3% from 2015. The movement from the average of the previous three years was also flat at 1%. Switzerland and Spain showed a TSV increase, while the UK and Norway showed a TSV decrease. Germany and France, which are the main European visa markets, were stable.

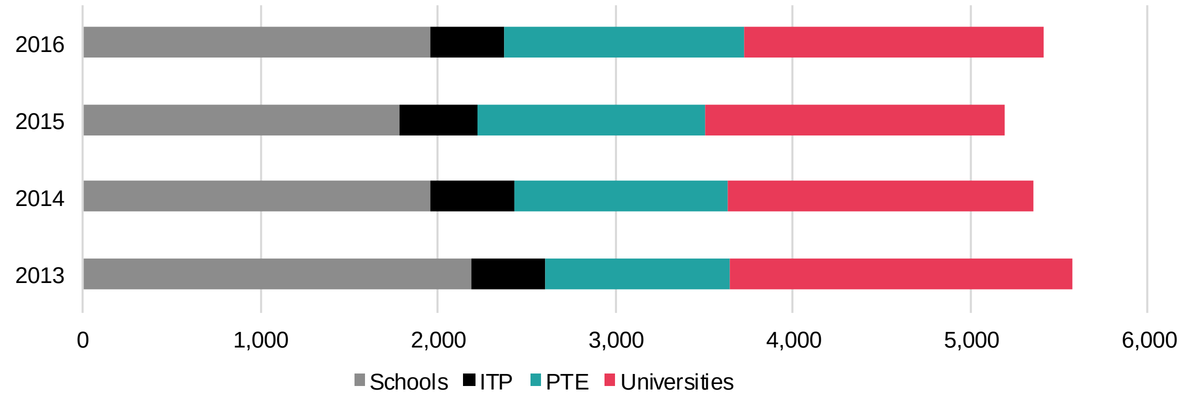
Europe: TSV issued in 2013-2016



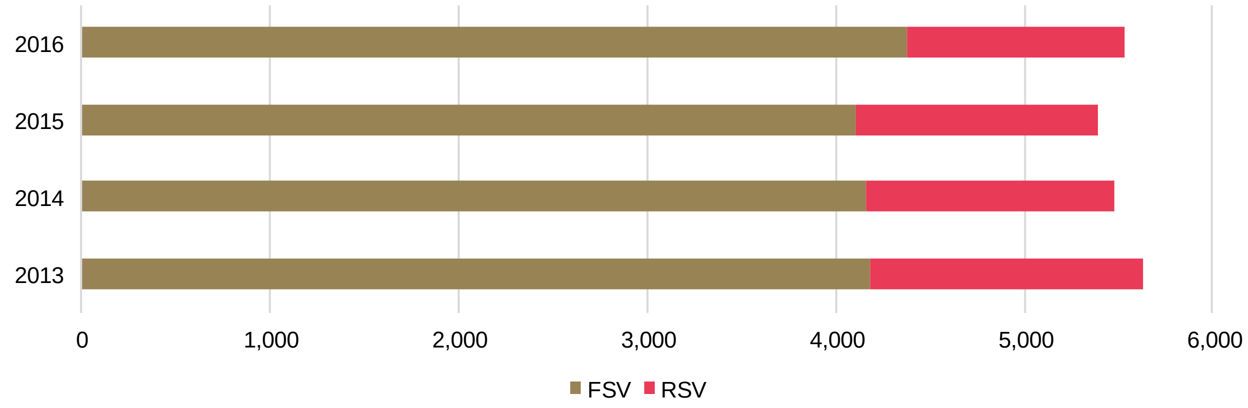
Europe: TSV by region



Europe: Sector breakdown for 2013-2016



Europe : Cumulative total for RSV and FSV, 2014-2016



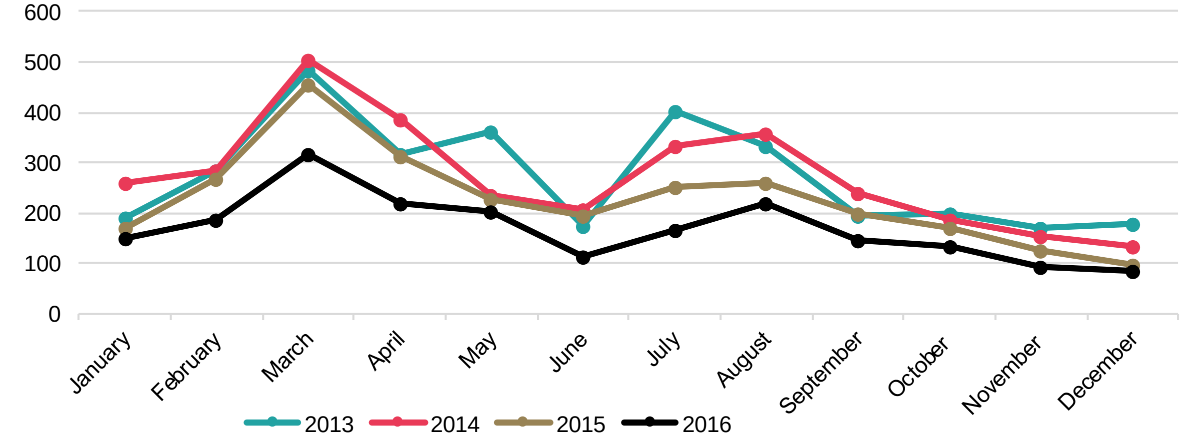
5,530	**Visas issued in 2016 compared to an average of the previous three years**	**RSV -**	197	-15%	**FSV**	226	5%	**TSV**	30	1%
815	**Visas issued in December 2016 compared to previous two Decembers**	**RSV -**	1	-2%	**FSV**	183	32%	**TSV**	182	29%

Middle East

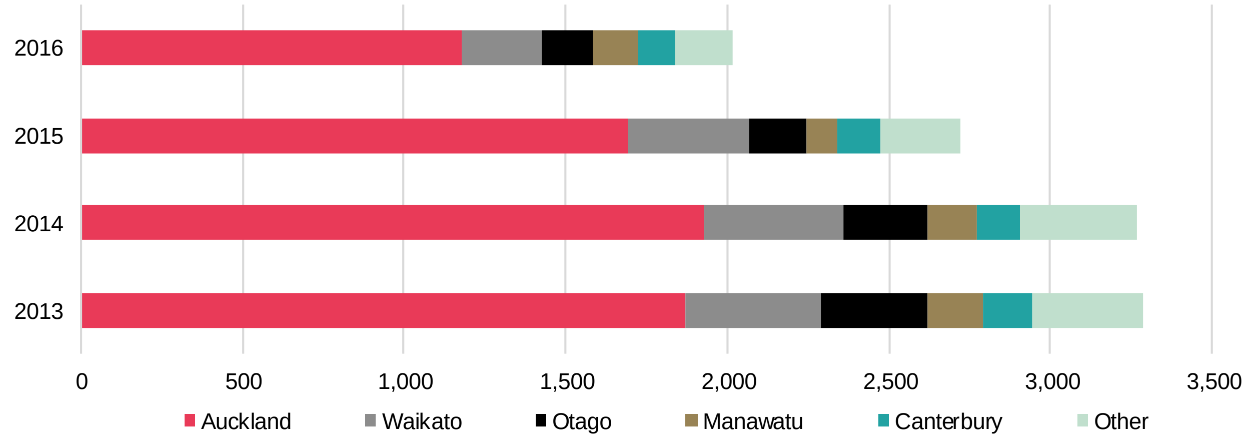
December 2016

Middle East FSV for 2016 decreased by 35% (-1,074) compared to an average of the previous three years. This is almost entirely being driven by changes in the Saudi Arabian market detailed on the following page. This decrease can be seen in all sectors. However, there was an increase in FSV in 2015 compared to 2016, which came from Iran and Oman.

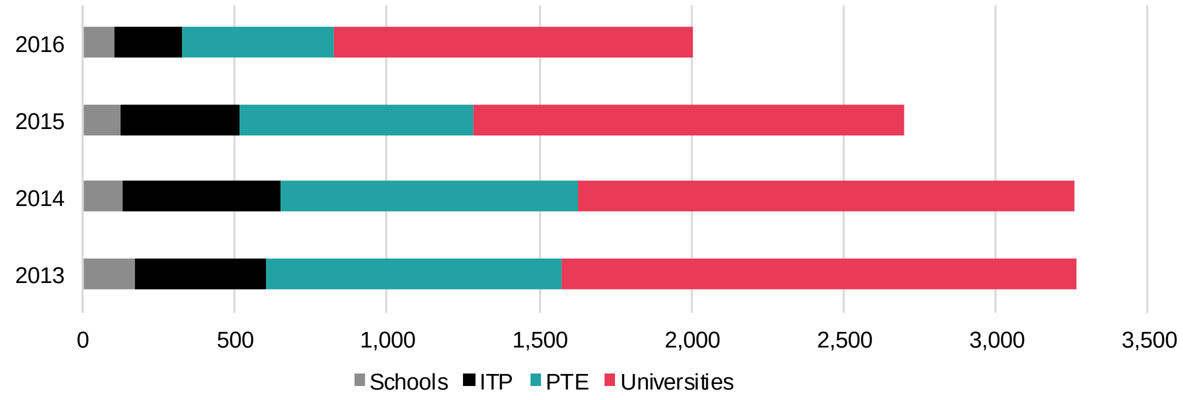
Middle East: TSV issued in 2013-2016



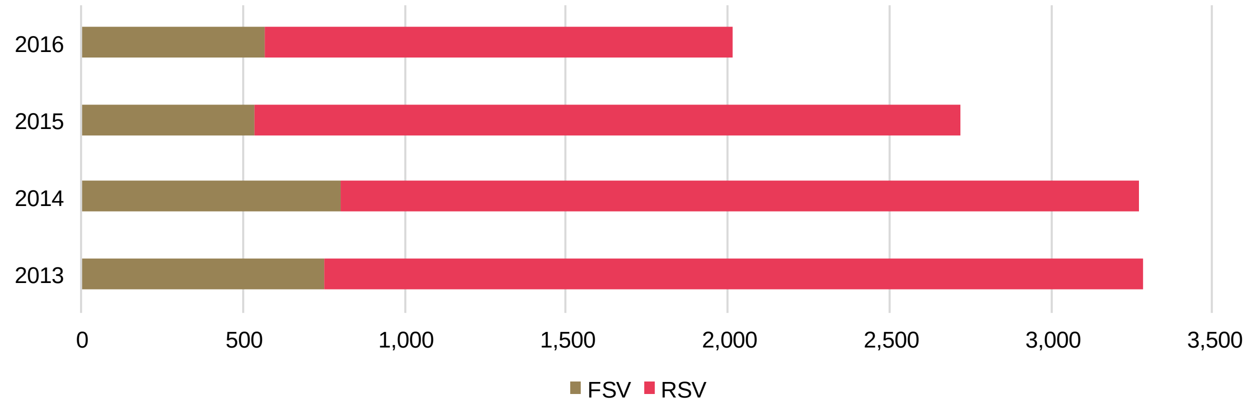
Middle East: TSV by region



Middle East: Sector breakdown for 2013-2016



Middle East : Cumulative total for RSV and FSV, 2014-2016



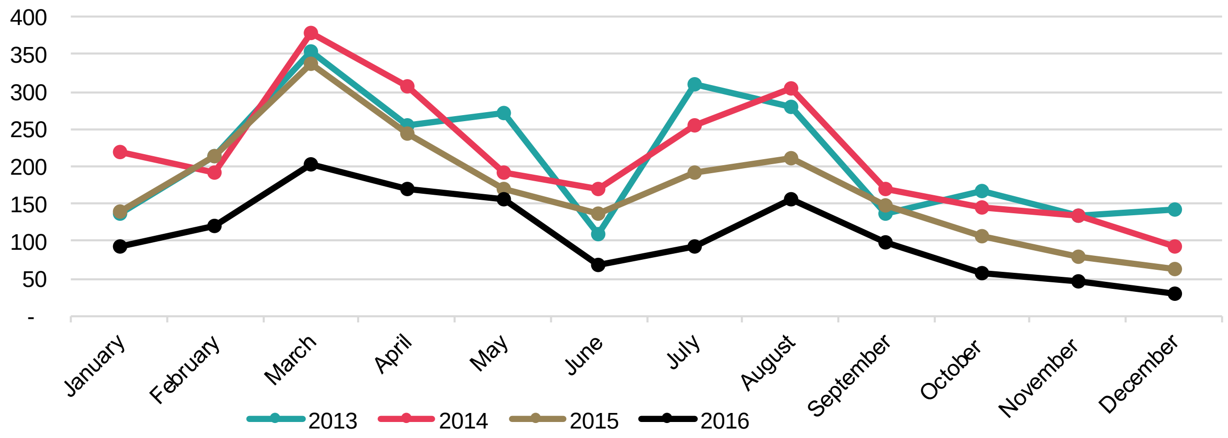
2,016	Visas issued in 2016 compared to an average of the previous three years	RSV -	945	-40%	FSV -	129	-18%	TSV - 1,074	-35%
83	Visas issued in December 2016 compared to previous two Decembers	RSV -	33	-47%	FSV	3	6%	TSV - 30	-27%

Saudi Arabia

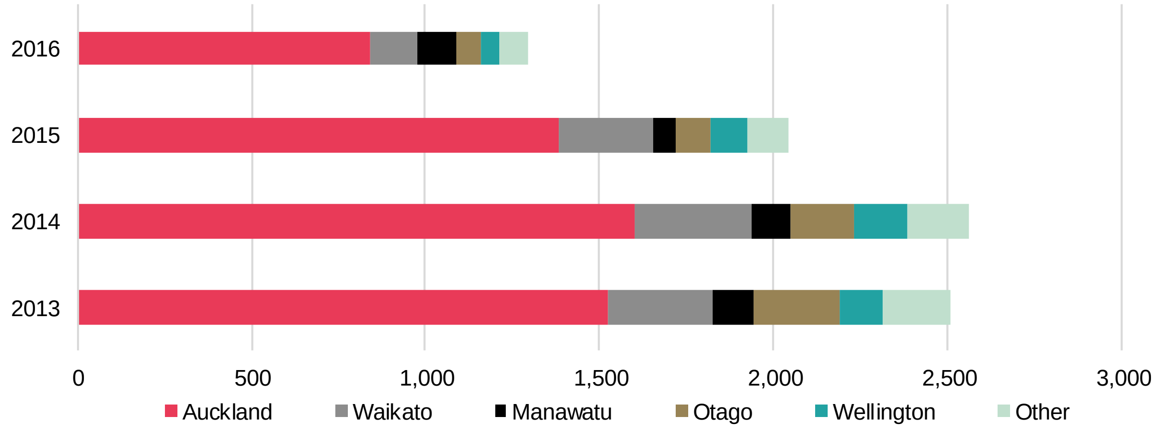
December 2016

Saudi Arabian TSV for 2016 decreased by 46% (-1,079) from an average of the previous three years. This is due to restrictions to the Saudi Arabian scholarships programme, which allowed many Saudi Arabians to come to New Zealand for study.

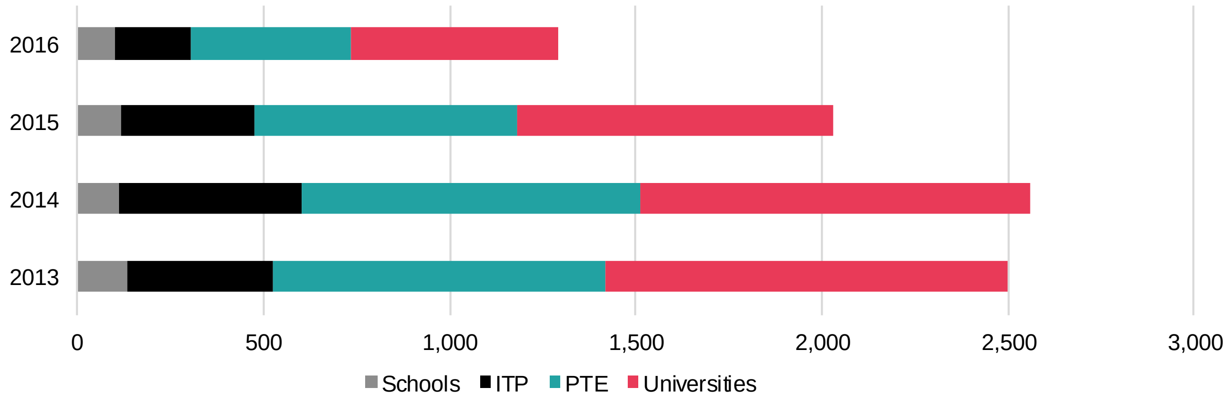
Student visas approved for Saudi Arabia 2013-2016



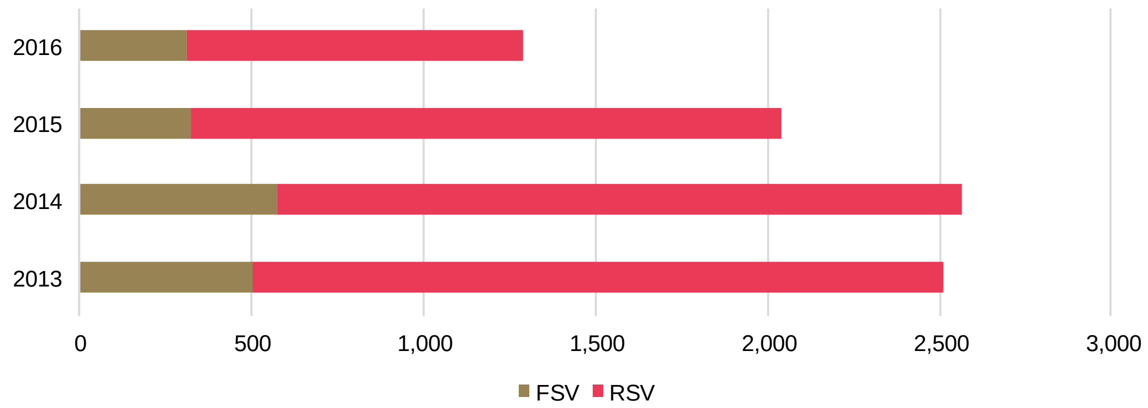
Saudi Arabia: TSV by region



Sector breakdown for TSV for Saudi Arabia 2016



Saudi Arabia : Cumulative total for RSV and FSV, 2014-2016



1,292	Visas issued in 2016 compared to an average of the previous three years	RSV	- 922	-48%	FSV	- 158	-34%	TSV	- 1,079	-46%
31	Visas issued in December 2016 compared to previous two Decembers	RSV	- 34	-67%	FSV	- 13	-47%	TSV	- 47	-60%

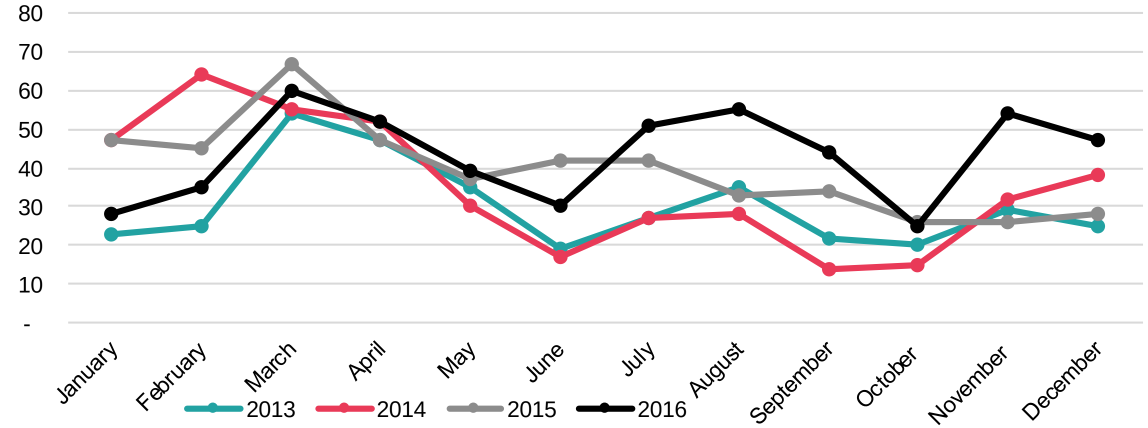
Trends by sector

Primary

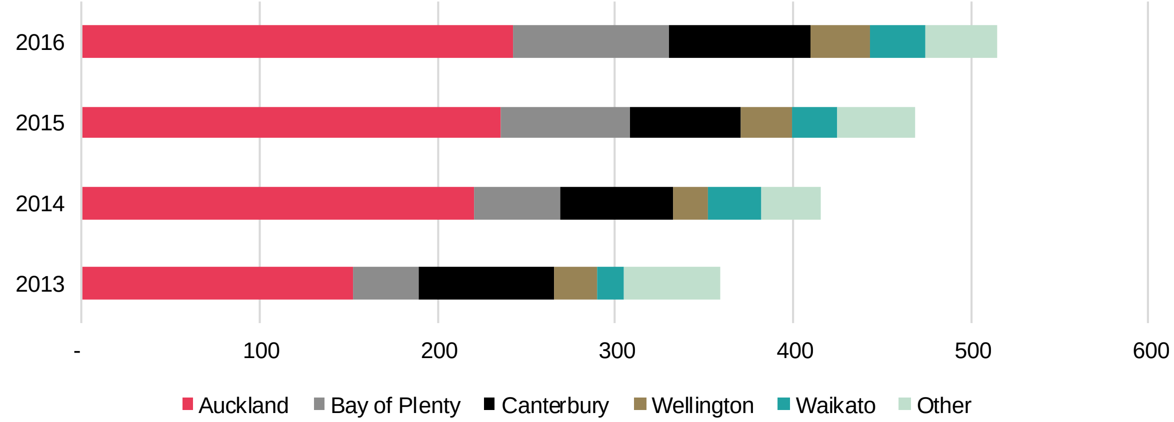
December 2016

The primary school sector has grown to 520 TSV in 2016, an increase of 10% from 2015. The increase is 25% when compared to the average of the previous three years. Most of this growth has been driven by Chinese students, with Auckland and the Bay of Plenty regions showing the most growth.

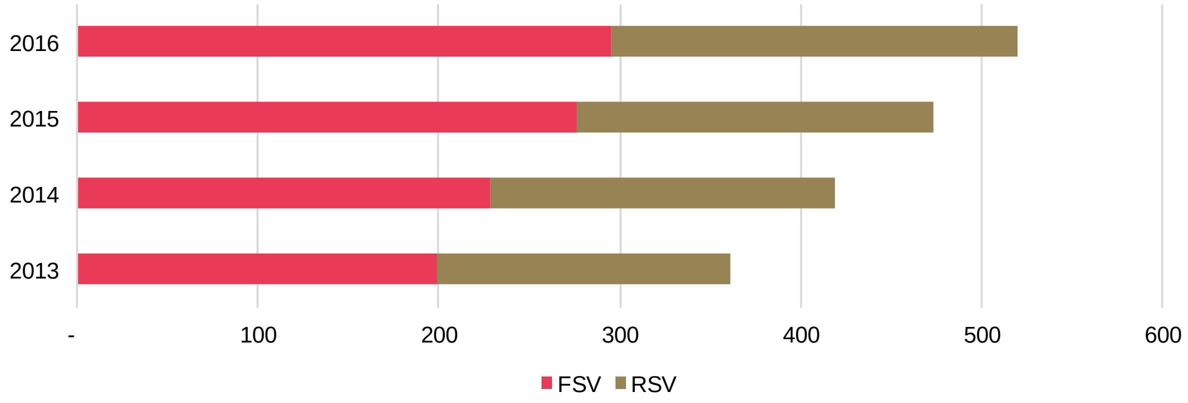
Student visas approved for Primary 2013-2016



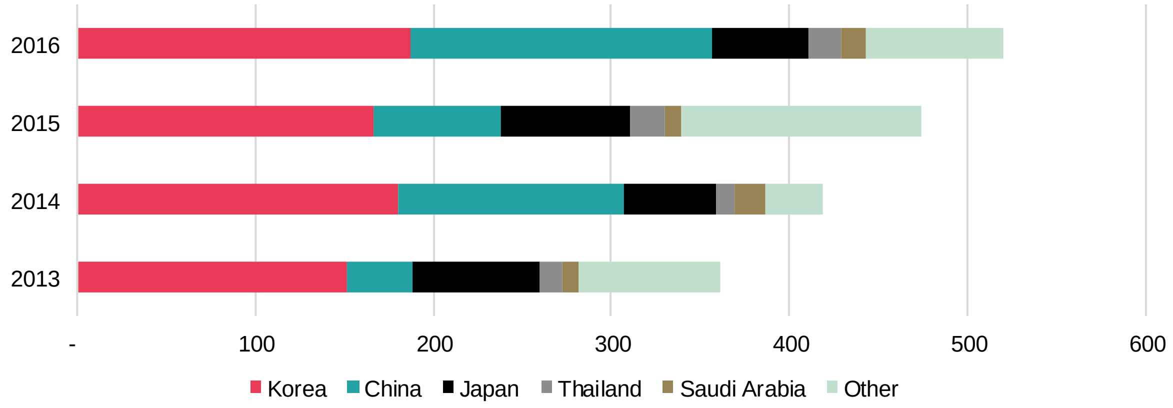
Primary TSV by region



Primary : Cumulative total for RSV and FSV, 2013-2016



Primary: Total student visas approved in the five most significant markets



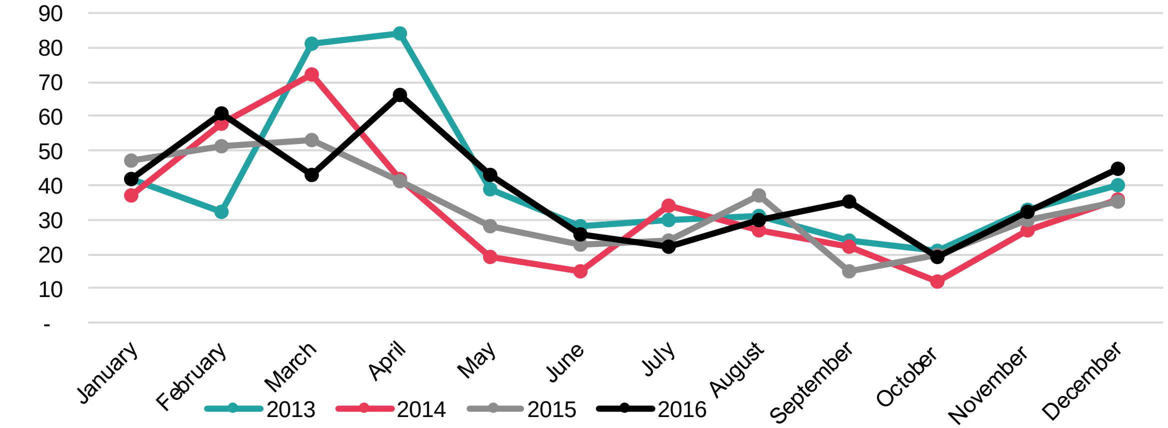
520	Visas issued in 2016 compared to an average of the previous three years	RSV	40	↑	22%	FSV	62	↑	26%	TSV	102 ↑ 24%
47	Visas issued in December 2016 compared to previous two Decembers	RSV	-	→	0%	FSV	14	↑	64%	TSV	14 ↑ 42%

Intermediate

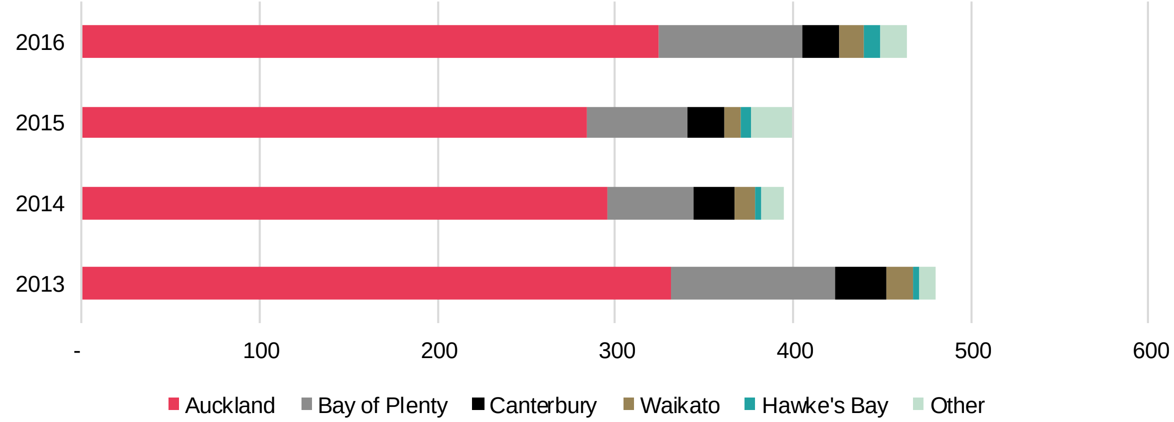
December 2016

The intermediate school sector increased by in 5% over 2015 to reach 464 TSV. China has been the main growth market here, although Korea remains the market with the most intermediate sector student visas. Auckland and the Bay of Plenty lead growth for this sector as well.

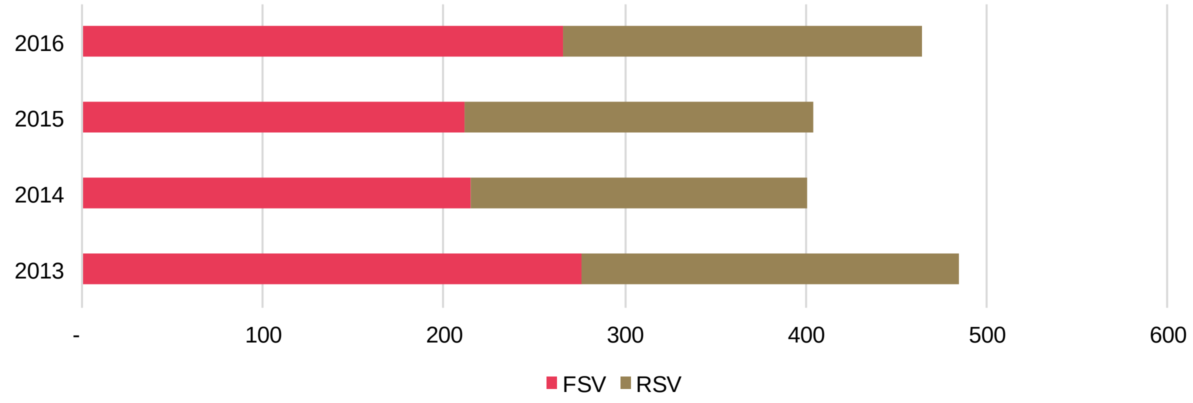
Student visas approved for Intermediate 2013-2016



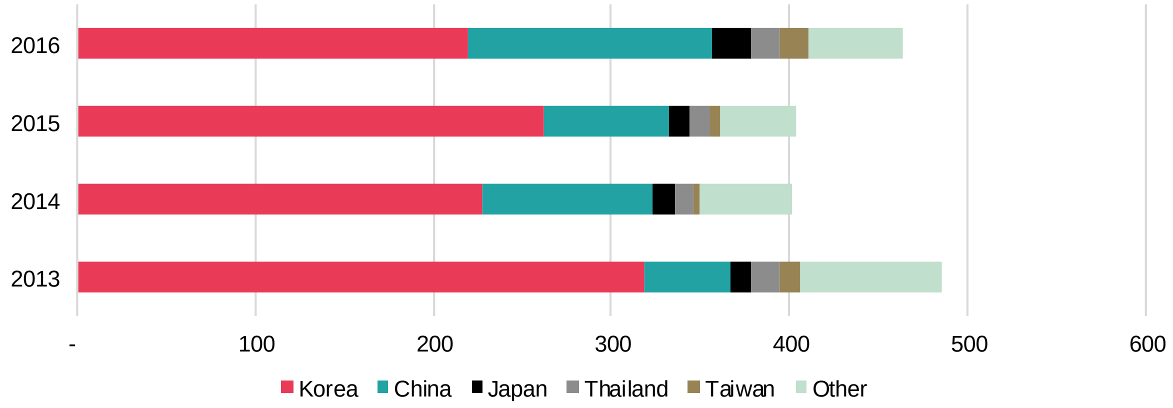
Intermediate TSV by region



Intermediate : Cumulative total for RSV and FSV, 2013-2016



Intermediate: Total student visas approved in the five most significant markets



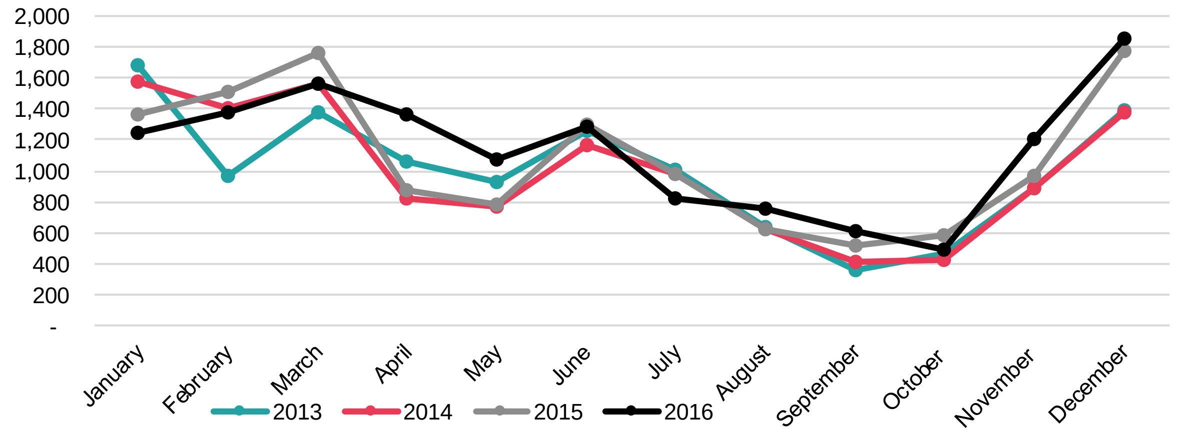
464	Visas issued in 2016 compared to an average of the previous three years	RSV	2	1%	FSV	32	14%	TSV	34	8%
45	Visas issued in December 2016 compared to previous two Decembers	RSV	3	27%	FSV	7	27%	TSV	10	27%

Secondary

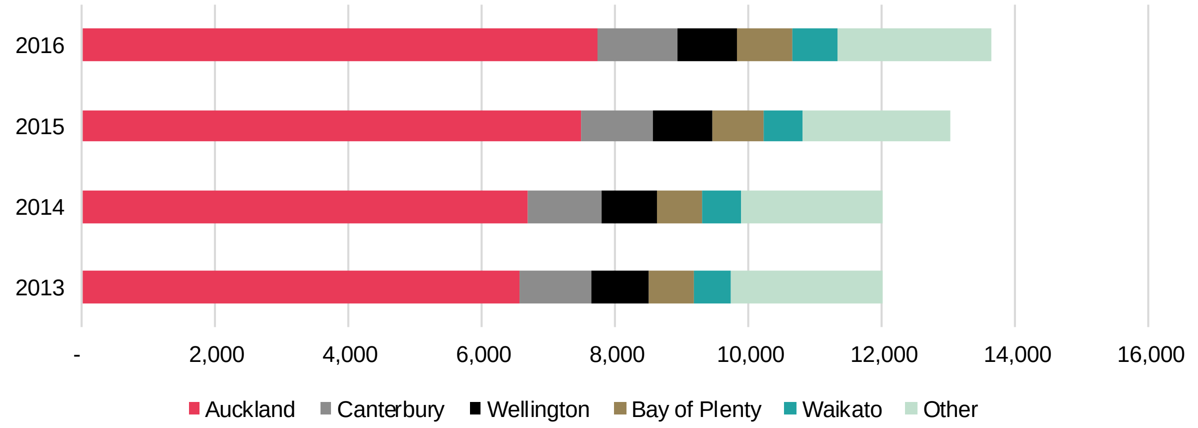
December 2016

The secondary school sector increased by 5% from 2015 to 2016 to reach 13,643 TSV. RSV for this sector increased by 16% to reach 6,590 visas, and now account for 48% of secondary school visas, which is higher than any of the years from 2013-2015. China and Japan showed the most market growth with Auckland, Waikato, Canterbury and Bay of Plenty showing the most regional growth.

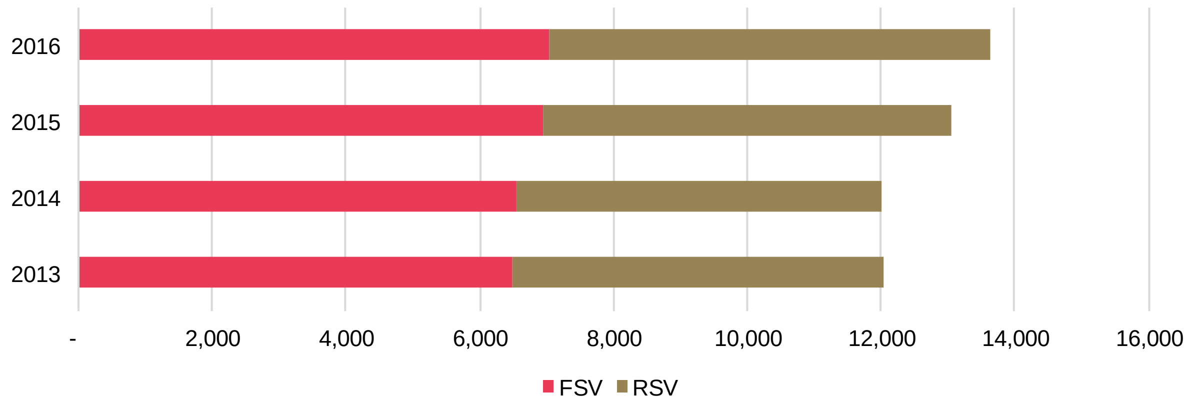
Student visas approved for Secondary 2013-2016



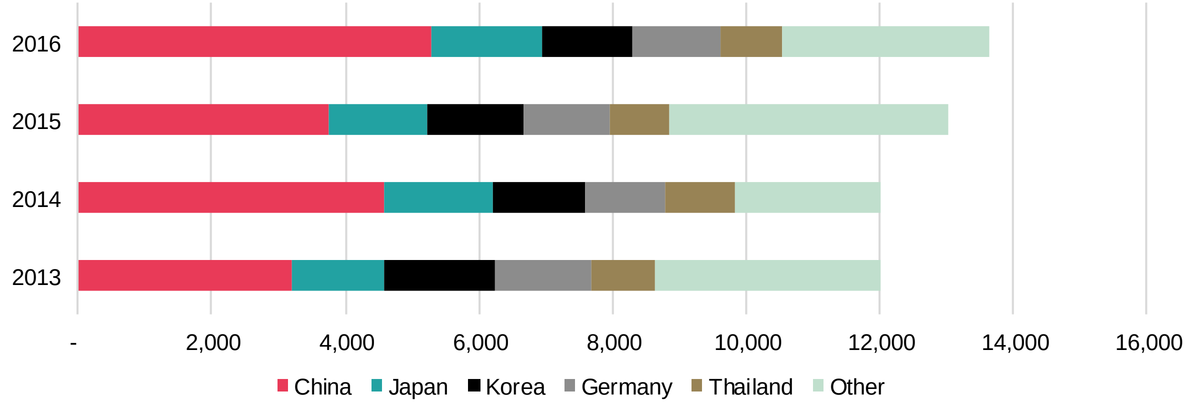
Secondary TSV by region



Secondary : Cumulative total for RSV and FSV, 2013-2016



Secondary: Total student visas approved in the five most significant markets

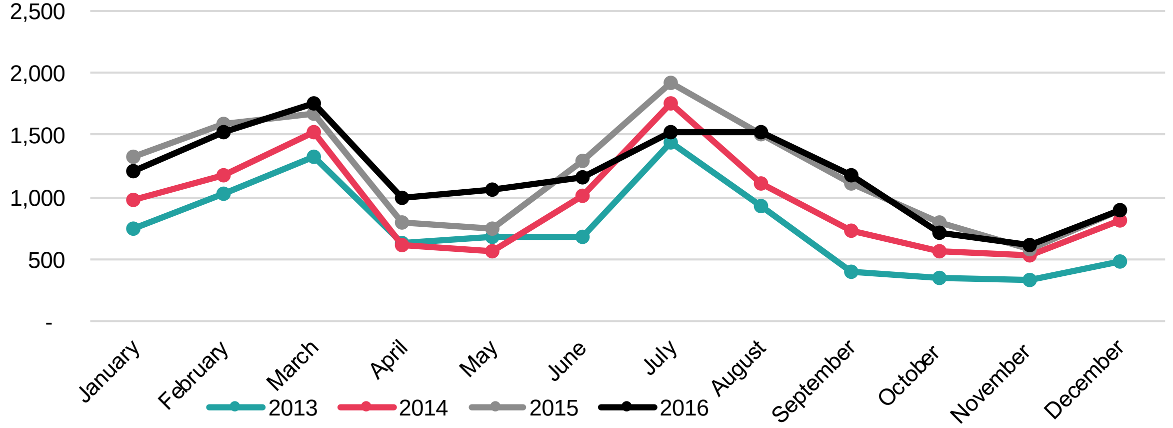


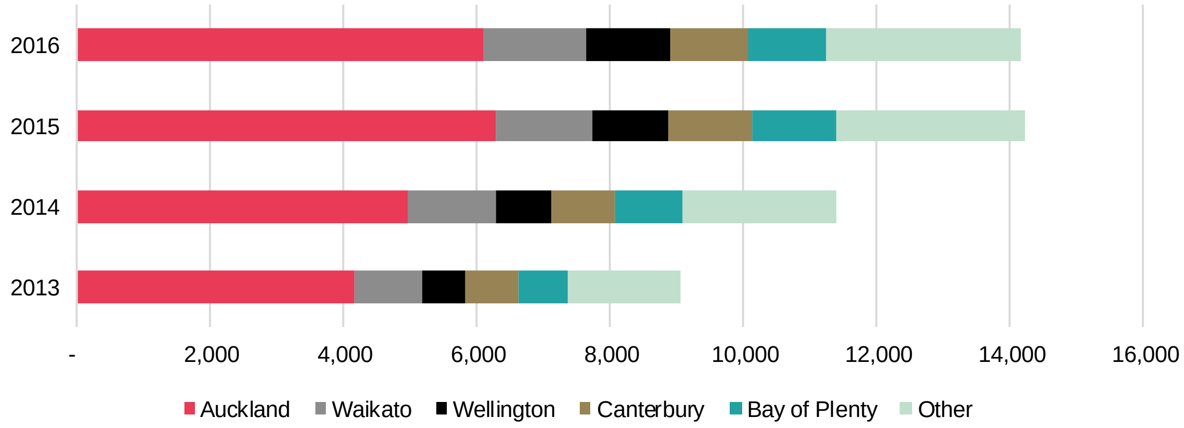
13,643	Visas issued in 2016 compared to an average of the previous three years	RSV	885	16%	FSV	399	6%	TSV	1,284	10%
1,853	Visas issued in December 2016 compared to previous two Decembers	RSV	213	53%	FSV	66	6%	TSV	279	18%

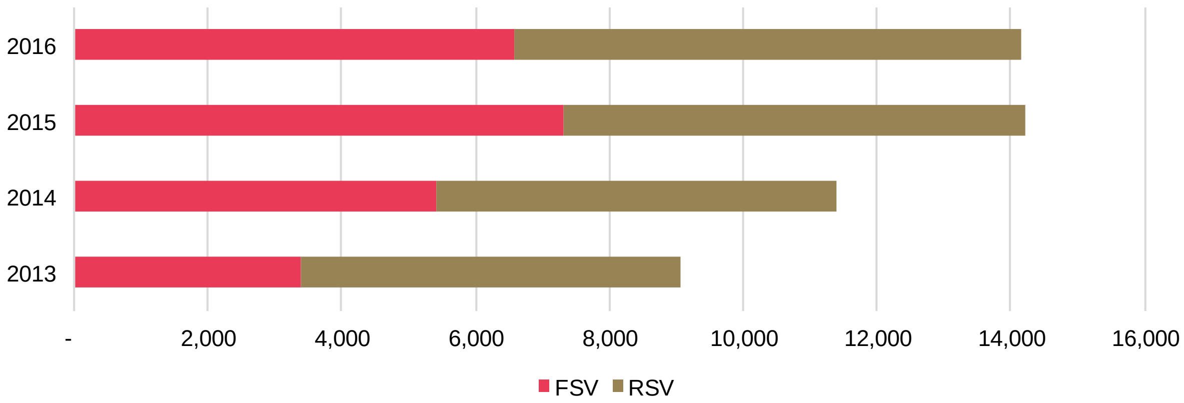
ITP

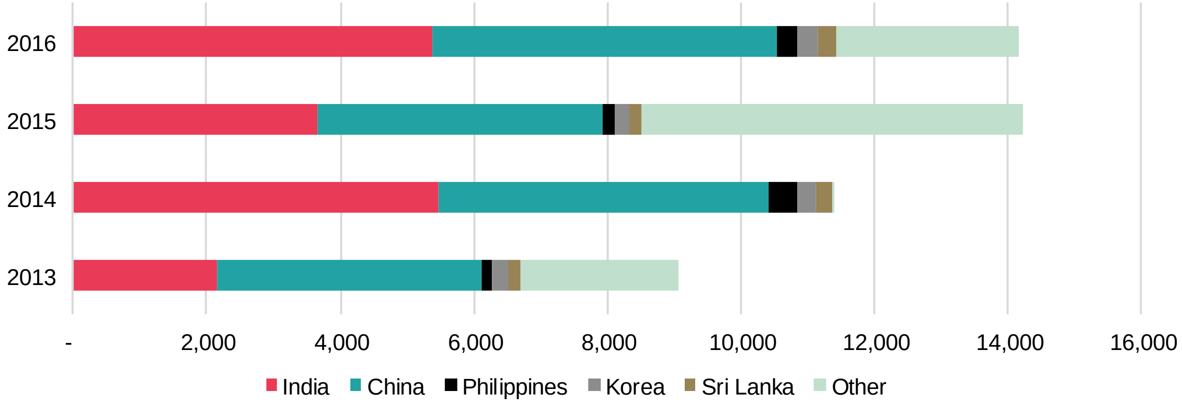
December 2016

The ITP sector was flat in 2016 compared to 2015. However, TSV were up 23% compared to an average of the previous three years. Since 2013, TSV have increased to 14,168 from 9,063. Most growth has been in the Indian market, with the main growth regions being Auckland, Waikato and Wellington. There was a decline in FSV from 2015 to 2016, which indicates a possible decline in 2017.









14,168	Visas issued in 2016 compared to an average of the previous three years	RSV	1,420	↑	23%	FSV	1,187	↑	22%	TSV	2,607	↑	23%
892	Visas issued in December 2016 compared to previous two Decembers	RSV	40	↑	16%	FSV -	1	→	0%	TSV	39	↑	5%

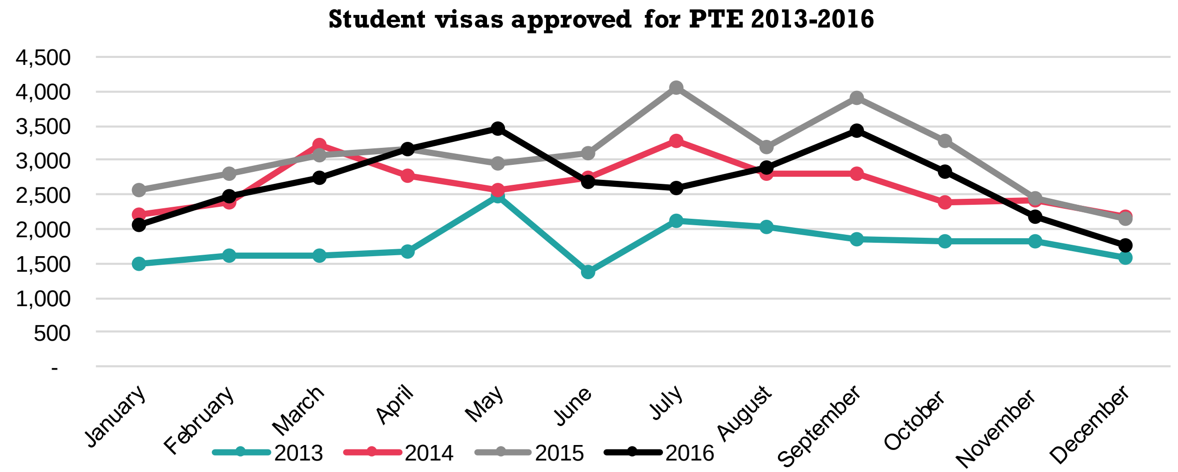
NEW ZEALAND IMMIGRATION

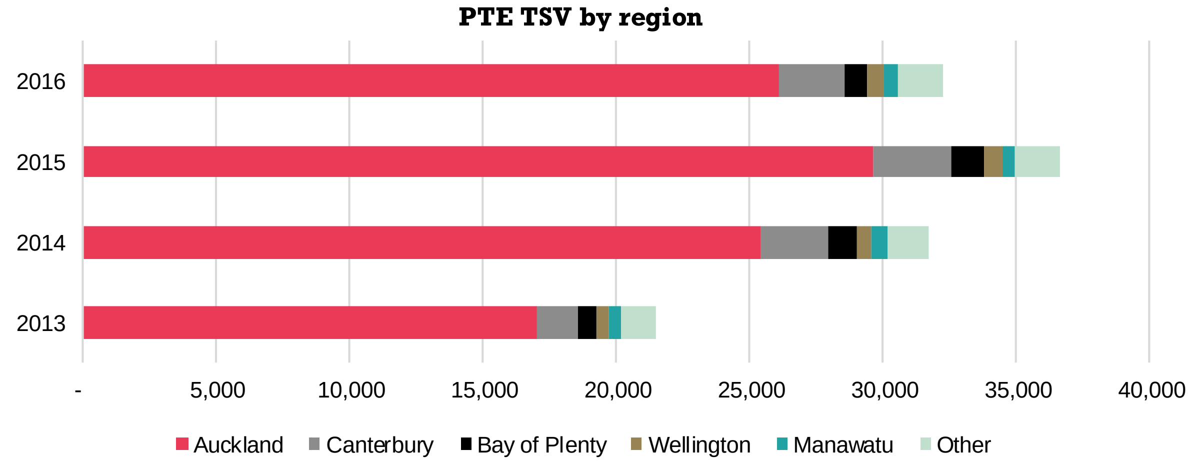
ThinkNew

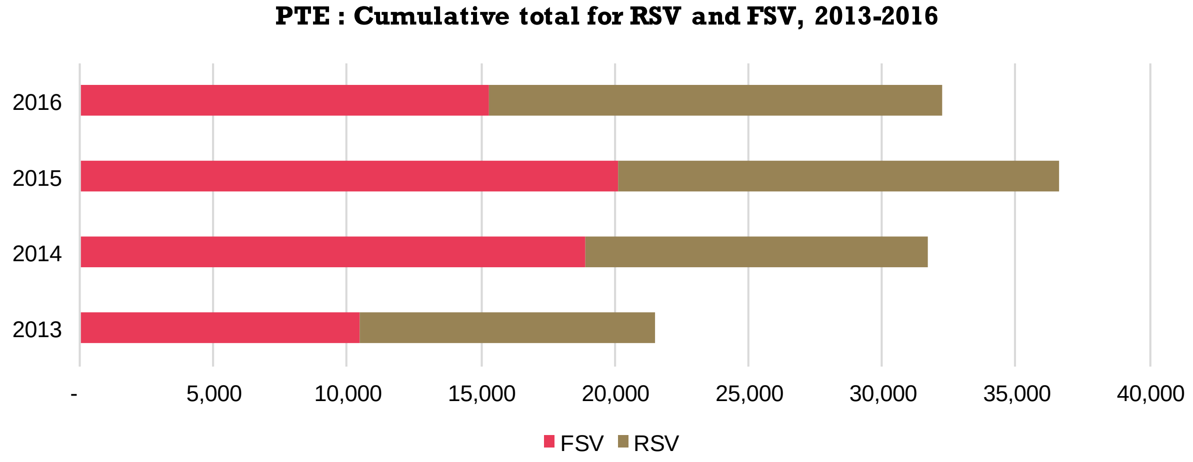
PTE

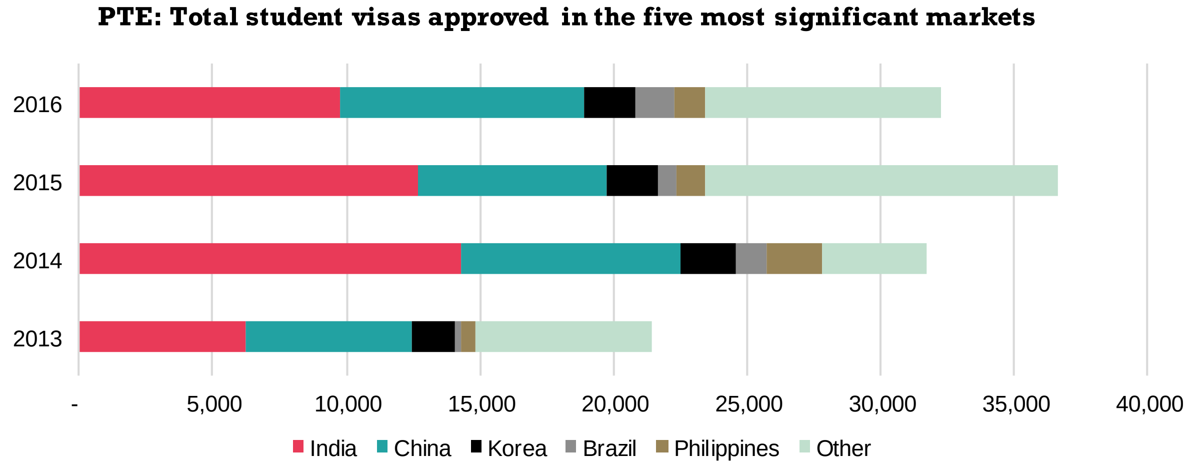
December 2016

The PTE sector's FSV in 2016 have declined by 24% (-4,833) compared to 2015. This has been mainly driven by a decrease in Indian FSV which has been partially offset by growth from China and Brazil. The majority of the decline has been centred in the Auckland region, with the Bay of Plenty also being affected.









32,237	Visas issued in 2016 compared to an average of the previous three years	RSV	3,491	26%	FSV	-1,201	-7%	TSV	2,290	8%
1,764	Visas issued in December 2016 compared to previous two Decembers	RSV	- 99	-13%	FSV	- 291	-21%	TSV	- 389	-18%

NEW ZEALAND IMMIGRATION

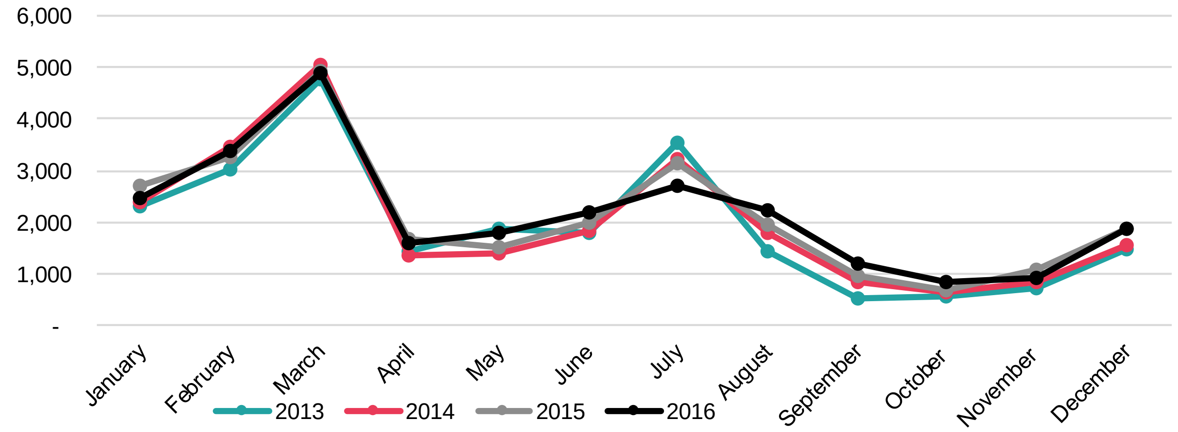
ThinkNew

Universities

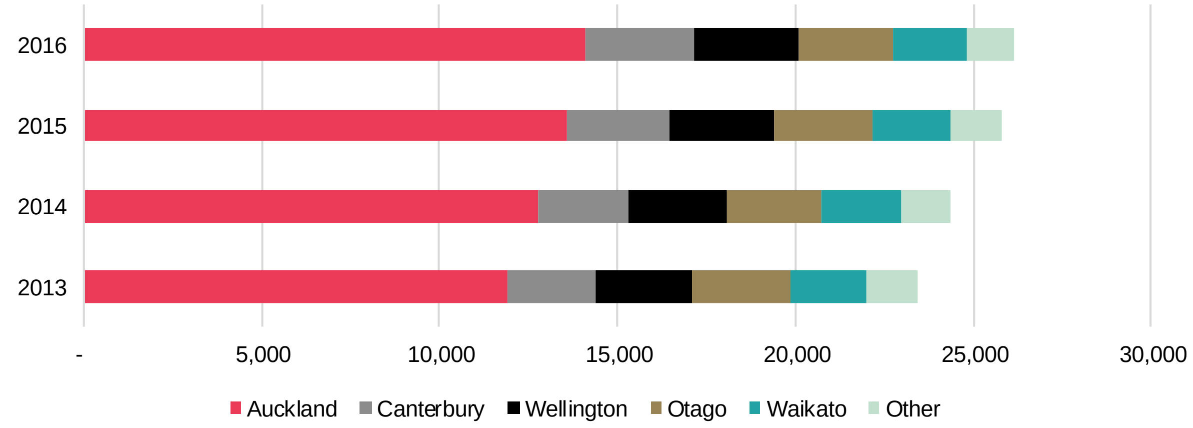
December 2016

University TSV changed little from 2015 to 2016, increasing by 1%. This growth has mainly been centred in Auckland, with the main growth markets being China and India. TSV increased by 6% when compared to the average of the previous three years.

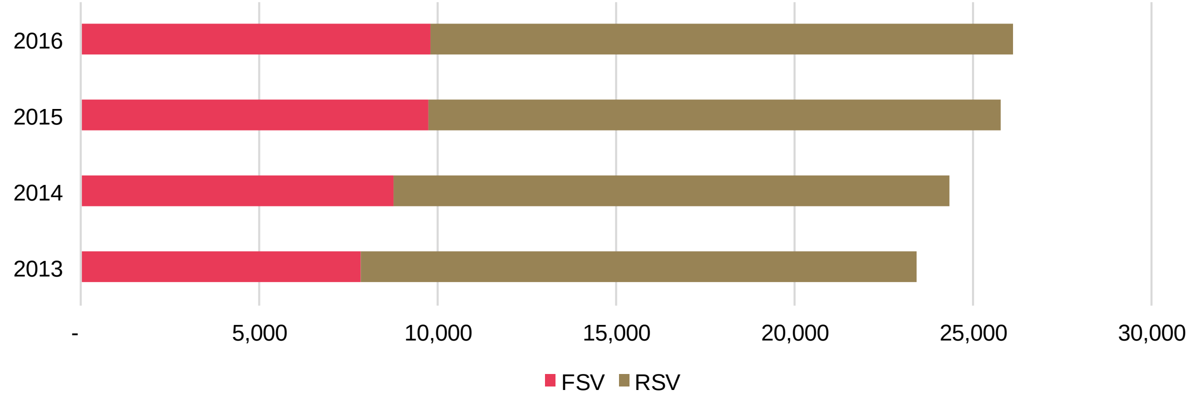
Universities: Student visas approved for 2013-2016



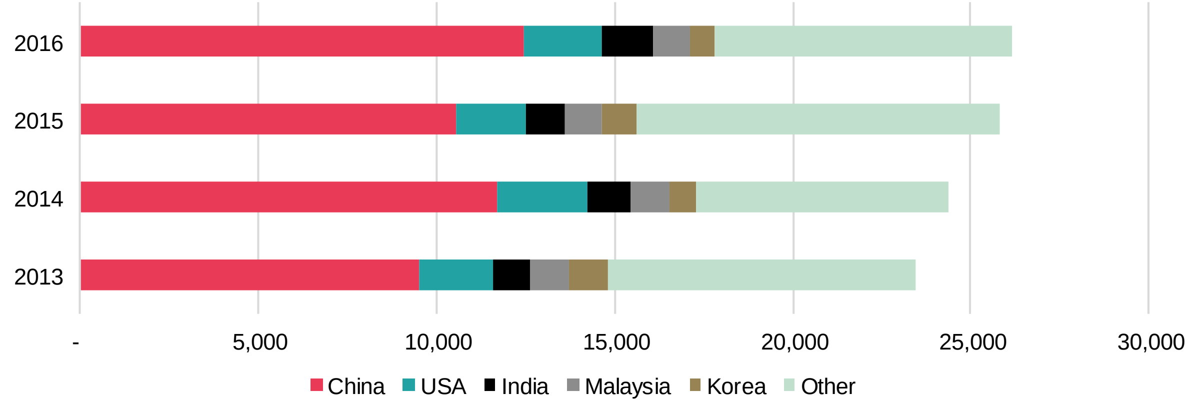
Universities TSV by region



Universities : Cumulative total for RSV and FSV, 2013-2016



Universities: Total student visas approved in the five most significant markets



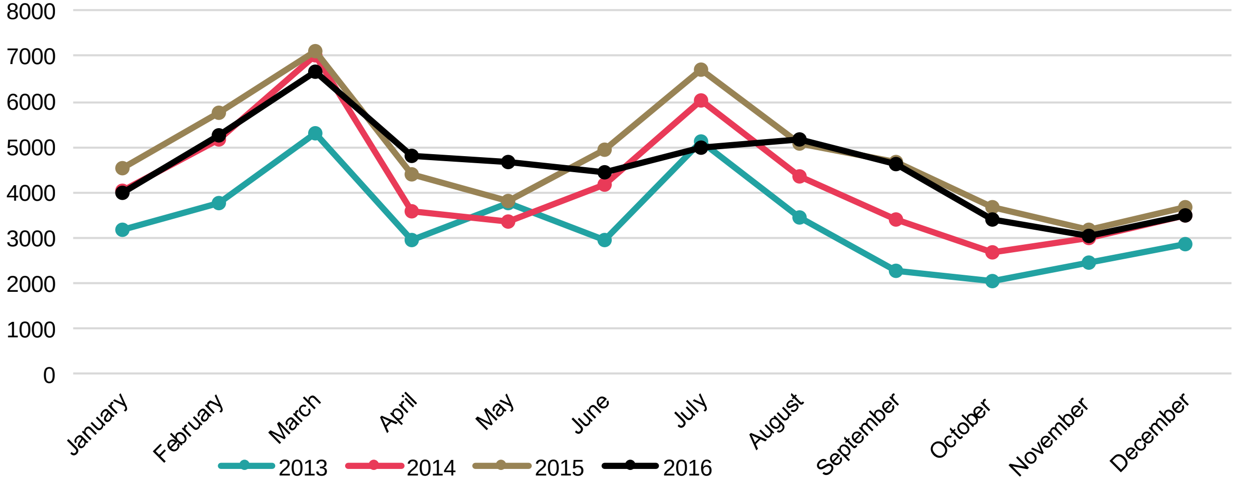
26,143	Visas issued in 2016 compared to an average of the previous three years	RSV	590	4%	FSV	1,003	11%	TSV	1,592	6%
1,872	Visas issued in December 2016 compared to previous two Decembers	RSV	- 14	-3%	FSV	182	15%	TSV	168	10%

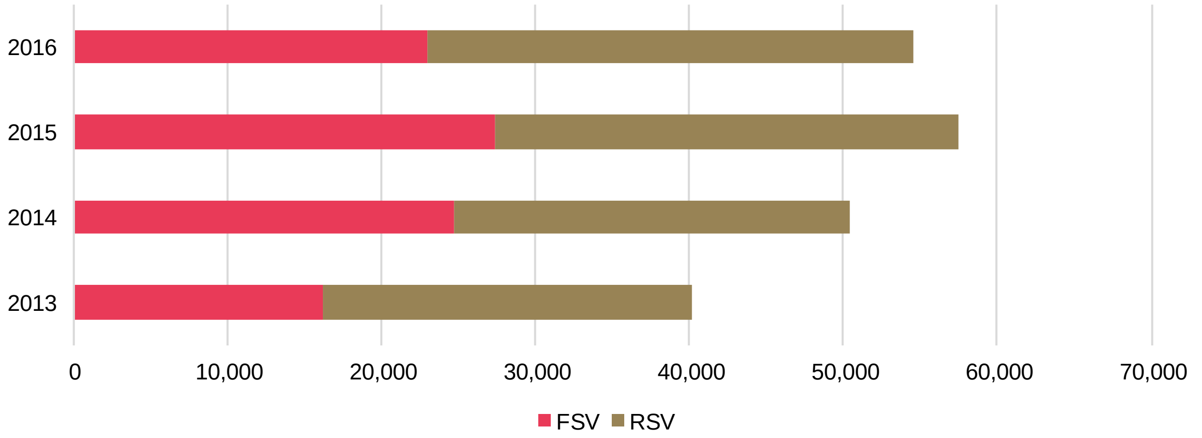
Trends by region

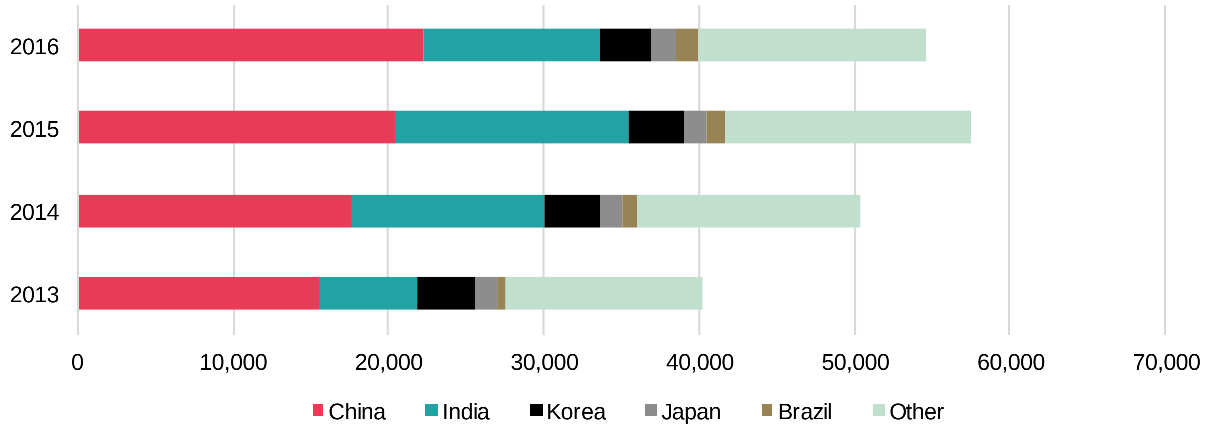
Auckland

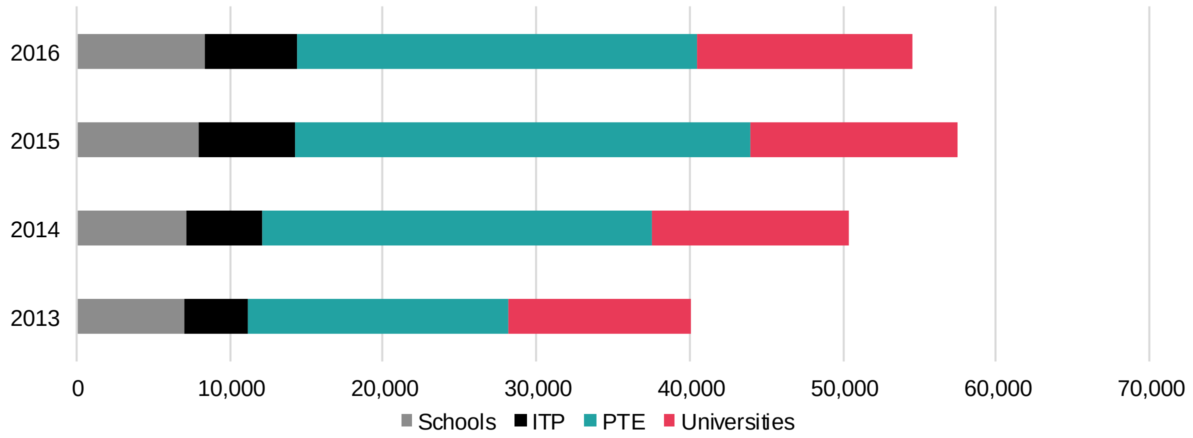
December 2016

Visas for Auckland decreased by 5% from 2015 to 2016, but showed a 9% increase compared to the average of the previous three years. Both the increase and the decrease were driven by PTE students from India. ITP students have also decreased slightly from 2015 to 2016. School and universities students have both increased slightly for 2016 compared to 2015.









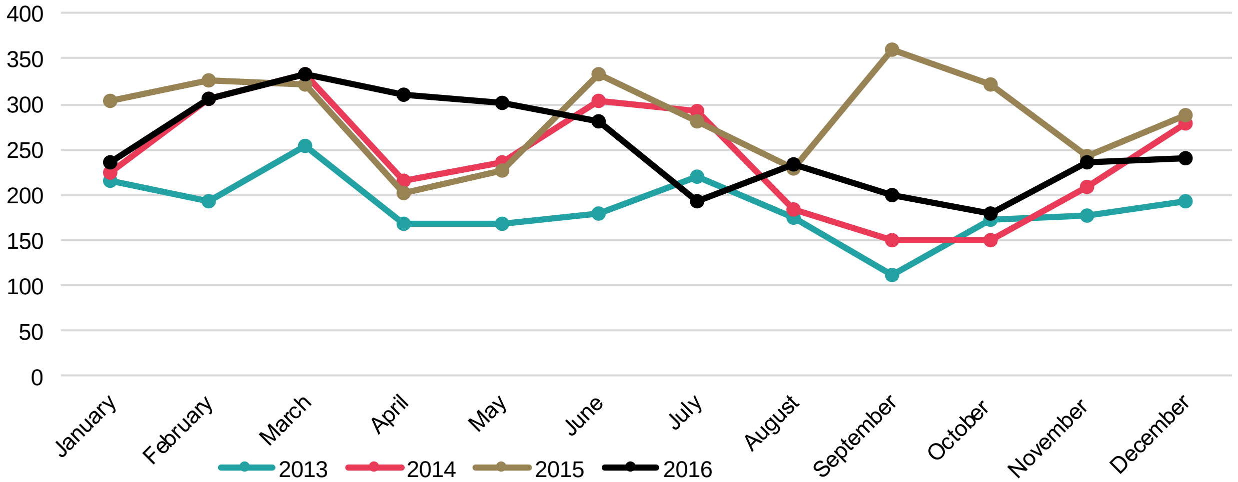
54,603	Visas issued in 2016 compared to an average of the previous three years	RSV	5,040	17%	FSV	201	1%	TSV	5,241	9%
3,499	Visas issued in December 2016 compared to previous two Decembers	RSV	46	4%	FSV	- 141	-6%	TSV	- 95	-3%

Bay of Plenty

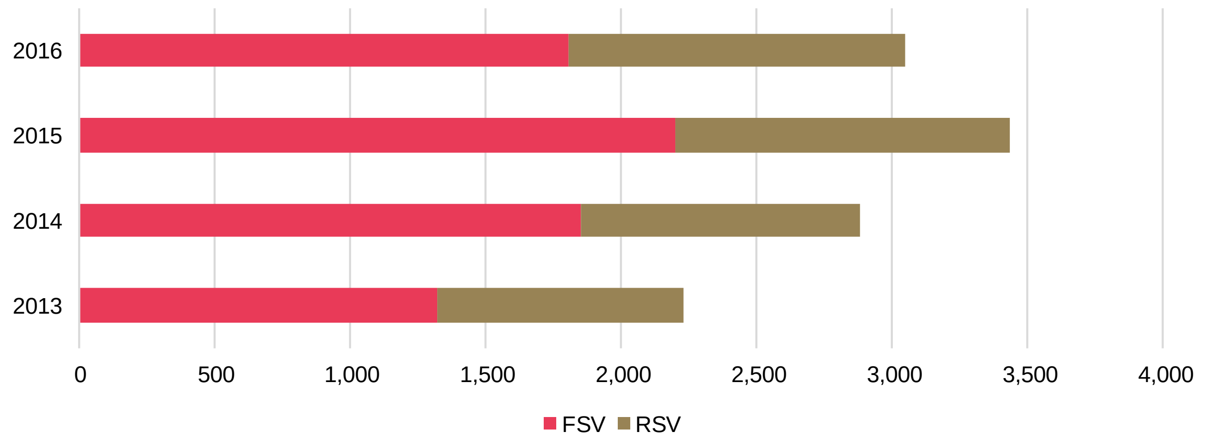
December 2016

Despite the 6% student visas increase in 2016 compared to an average of the three years from 2013-2016, there was a 12% decline in TSV for PTE students. PTE students also showed a 30% decline from 2015 to 2016 . The number of ITP sector students has also declined since 2015. However, the school sector has shown growth.

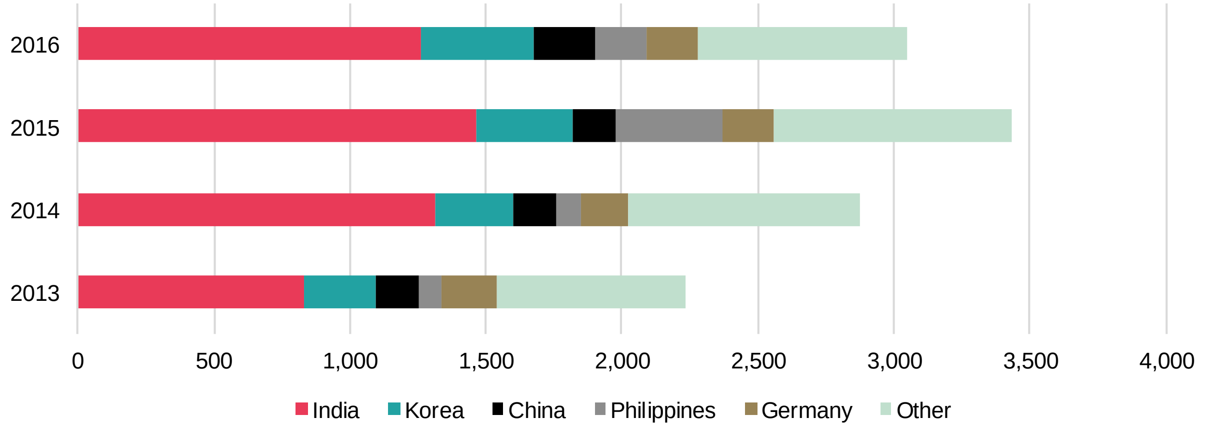
Student visas approved for Bay of Plenty 2013-2016



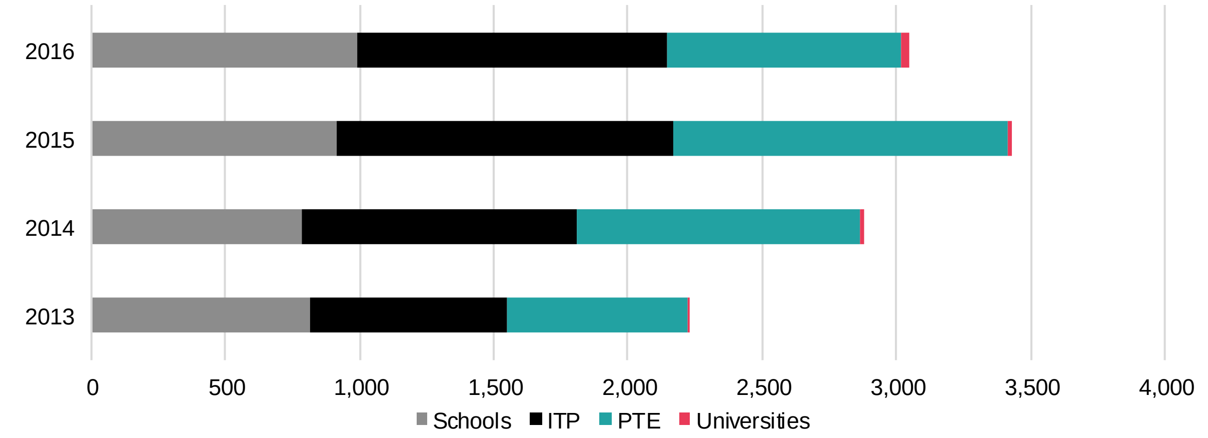
Bay of Plenty : Cumulative total for RSV and FSV, 2013-2016



Bay of Plenty: Total student visas approved in the five most significant markets



Sector breakdown for TSV for Bay of Plenty YTD



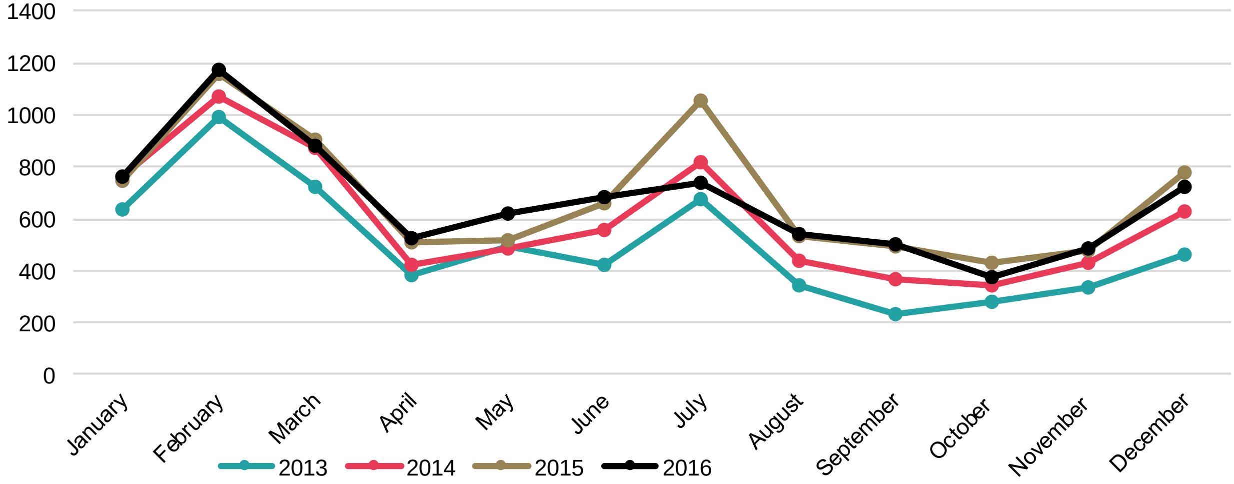
3,047	Visas issued in 2016 compared to an average of the previous three years	RSV	184	↑	15%	FSV	16	→	1%	TSV	199 ↑ 6%
240	Visas issued in December 2016 compared to previous two Decembers	RSV -	18	↓	-26%	FSV -	25	↓	-12%	TSV -	43 ↓ -15%

Canterbury

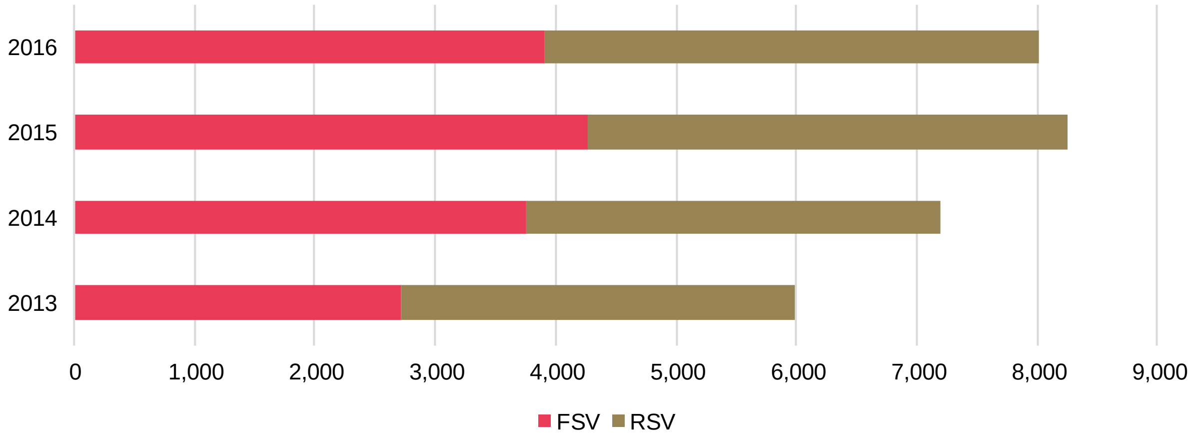
December 2016

There has been an 11% increase in TSV from 2016 compared to an average of the three years from 2013 to 2016. There was a 16% decline in PTE students from 2015 to 2016, and a 9% decline in ITP students. These declines mainly came from the Indian and Filipino markets.

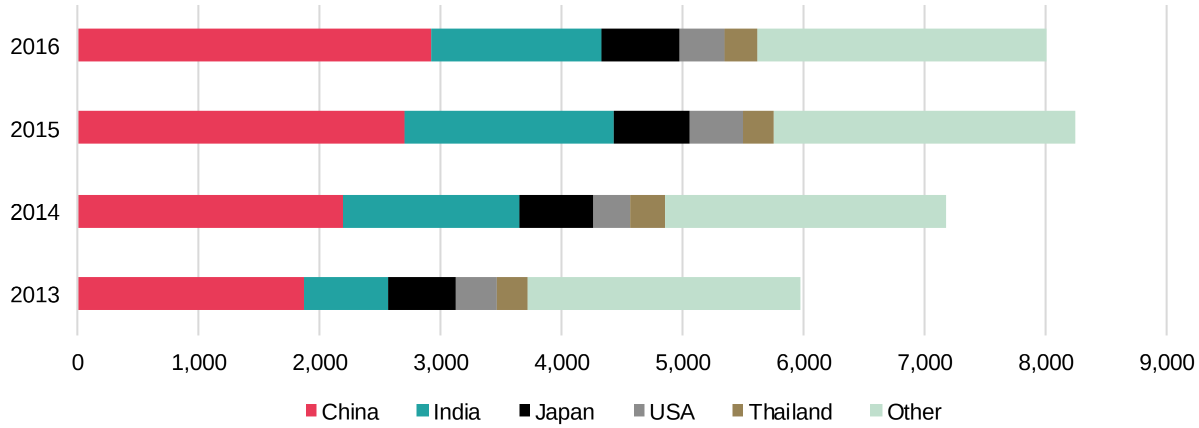
Student visas approved for Canterbury 2013-2016



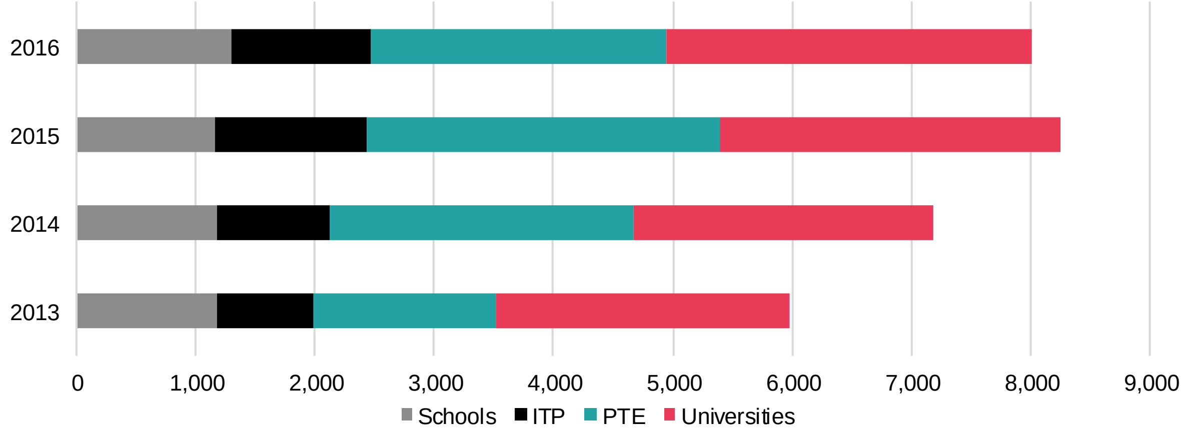
Canterbury : Cumulative total for RSV and FSV, 2013-2016



Canterbury: Total student visas approved in the five most significant markets



Sector breakdown for TSV for Canterbury YTD



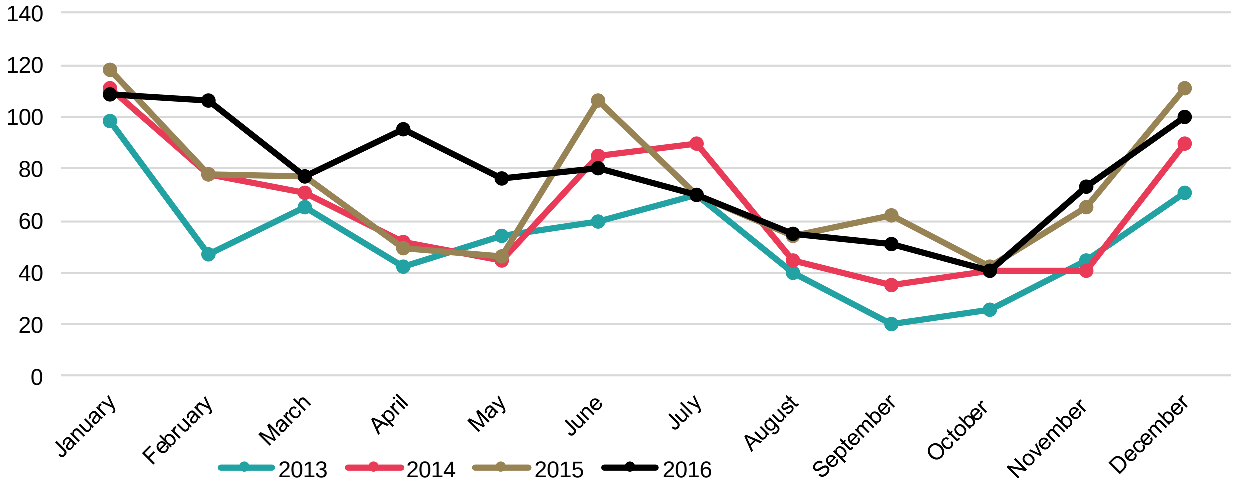
8,009	Visas issued in 2016 compared to an average of the previous three years	RSV	542	14%	FSV	326	8%	TSV	868	11%
719	Visas issued in December 2016 compared to previous two Decembers	RSV	39	22%	FSV	- 20	-4%	TSV	19	3%

Hawke's Bay

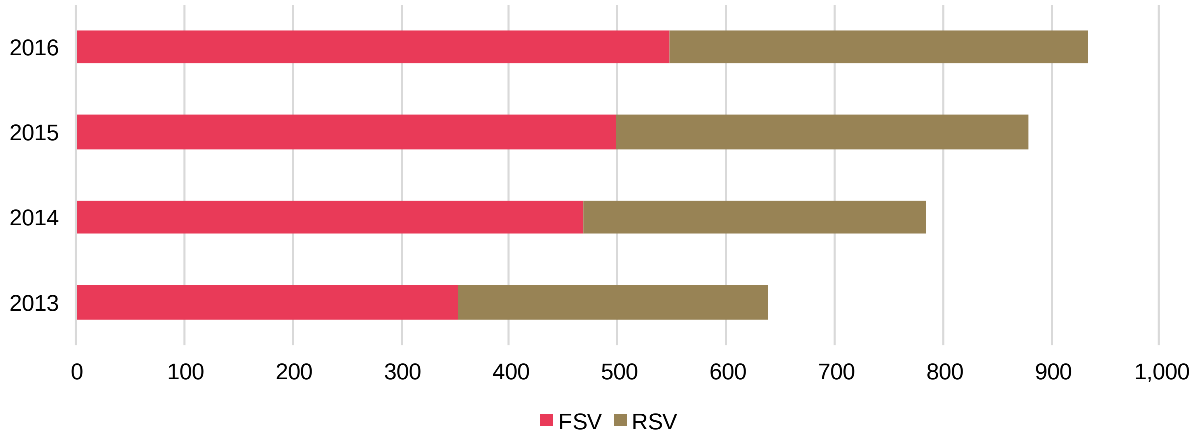
December 2016

TSV showed a 19% increase in 2016 compared to an average of the three years from 2013 to 2016 across all sectors. This increase has come from China, India and Japan. There has been an 11% decline in Indian students from 2015 to 2016. There was also a slight decrease in PTE visas issued from 2015 to 2016, but an 11% increase in ITP students has more than offset this decrease. Overall, visas issued to international students in Hawke's Bay increased by 6% from 2015 to 2016, the highest percentage among reported regions.

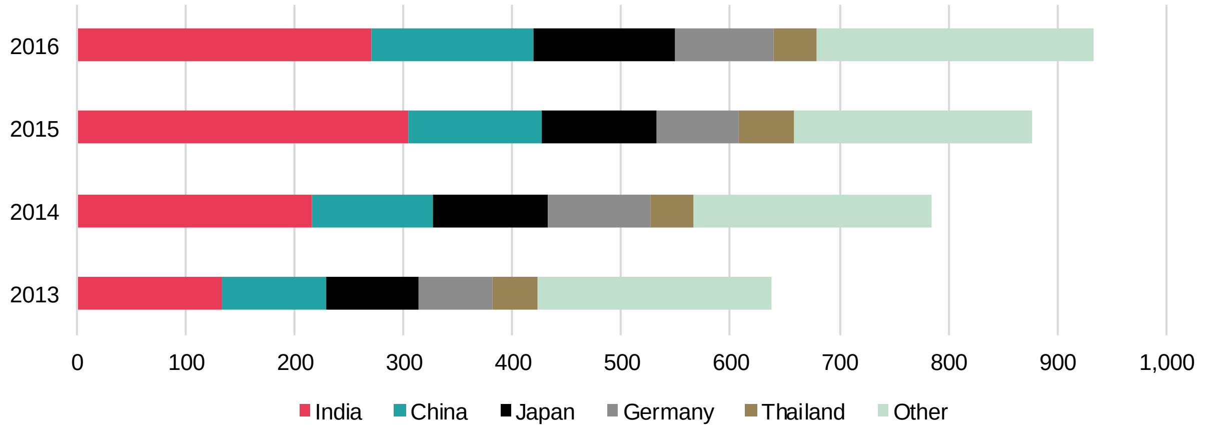
Student visas approved for Hawke's Bay 2013-2016



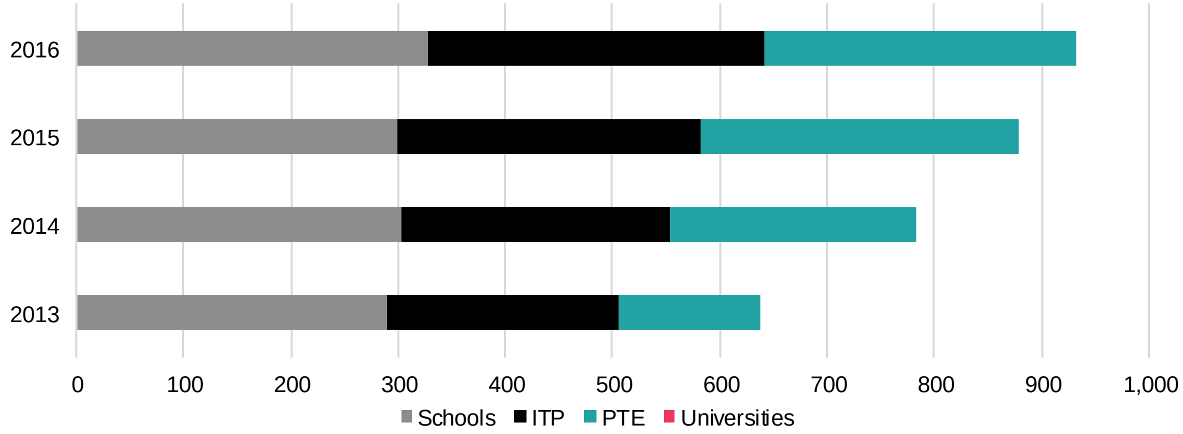
Hawke's Bay : Cumulative total for RSV and FSV, 2013-2016



Hawke's Bay: Total student visas approved in the five most significant markets



Sector breakdown for TSV for Hawke's Bay YTD

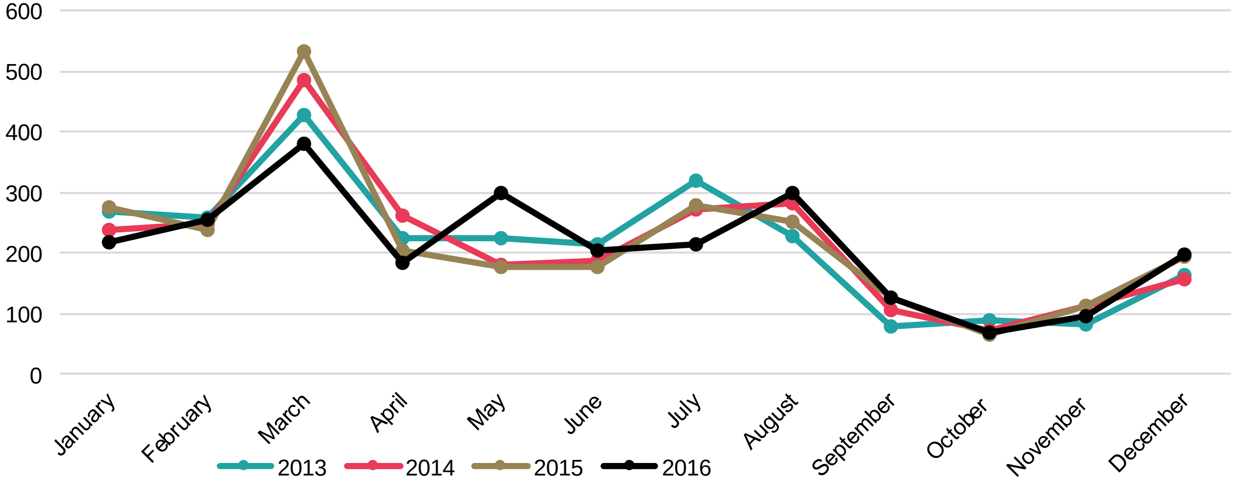


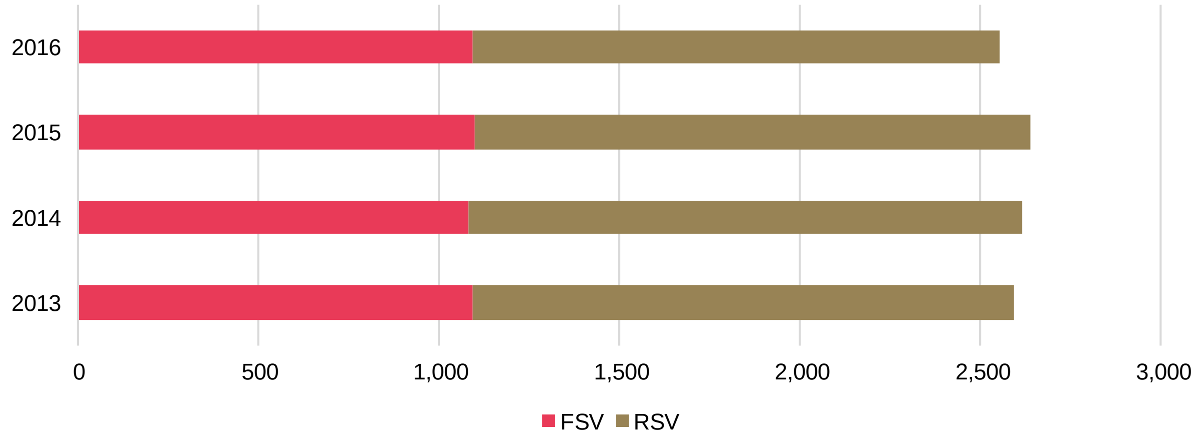
933	**Visas issued in 2016 compared to an average of the previous three years**	**RSV**	58	↑	15%	**FSV**	108	↑	22%	**TSV**	166 ↑ 19%
100	**Visas issued in December 2016 compared to previous two Decembers**	**RSV -**	2	↓	-6%	**FSV**	2	→	2%	**TSV -**	1 → 0%

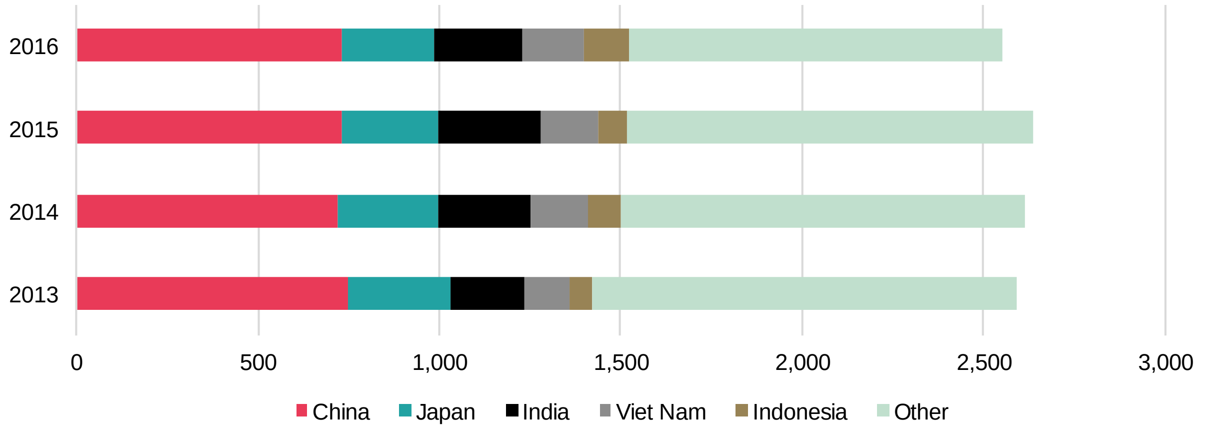
Manawatu

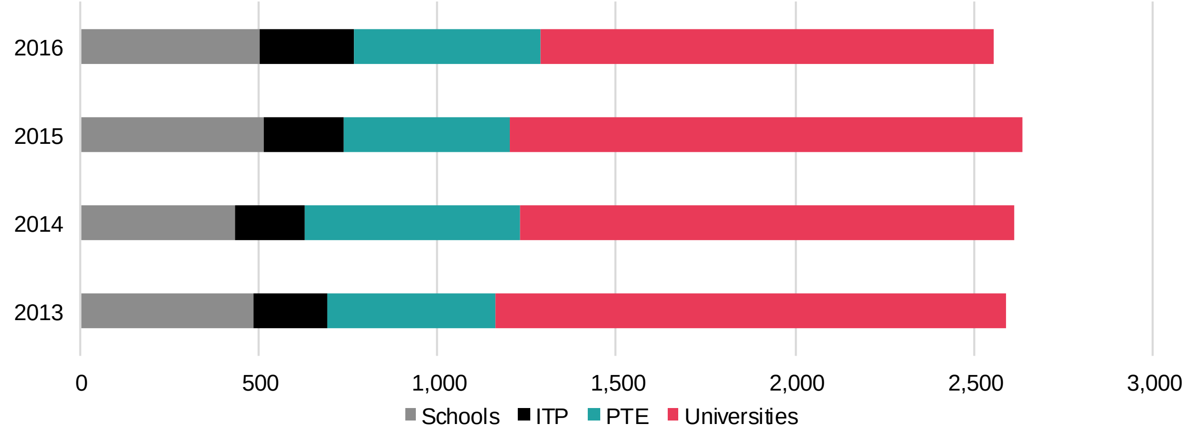
December 2016

TSVs have been stable in Manawatu, decreasing by 2% in 2016 compared to an average of the previous three years. There was a 11% decrease in visas issued for the universities sector, but there has been an increase in visas for the schools, ITP and PTE sectors.









2,554	Visas issued in 2016 compared to an average of the previous three years	RSV -	62	-4%	FSV	1	0%	TSV -	61	-2%
197	Visas issued in December 2016 compared to previous two Decembers	RSV -	1	-2%	FSV	22	18%	TSV	21	12%

NEW ZEALAND IMMIGRATION

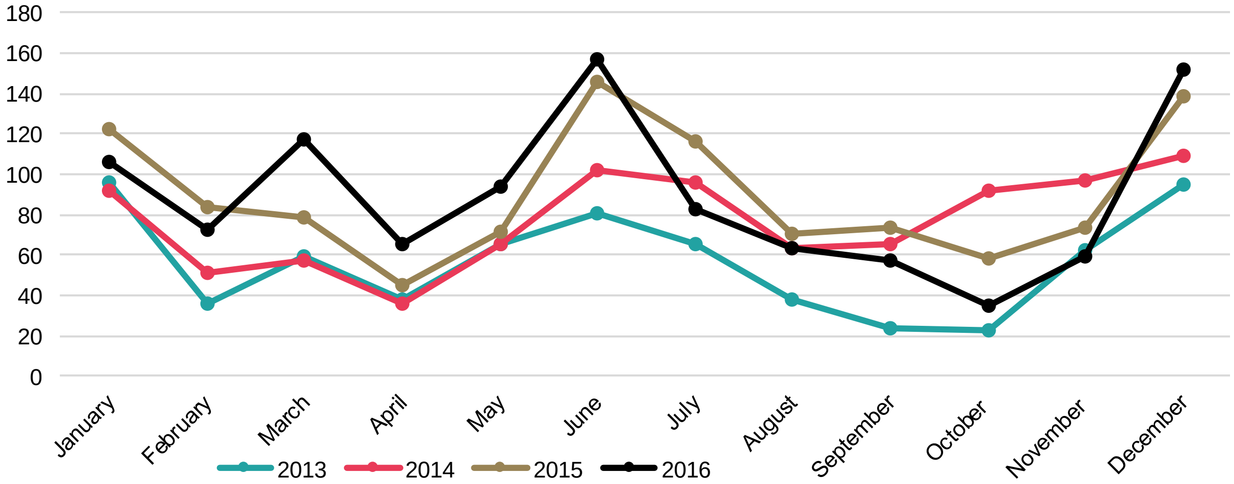
ThinkNew

Nelson

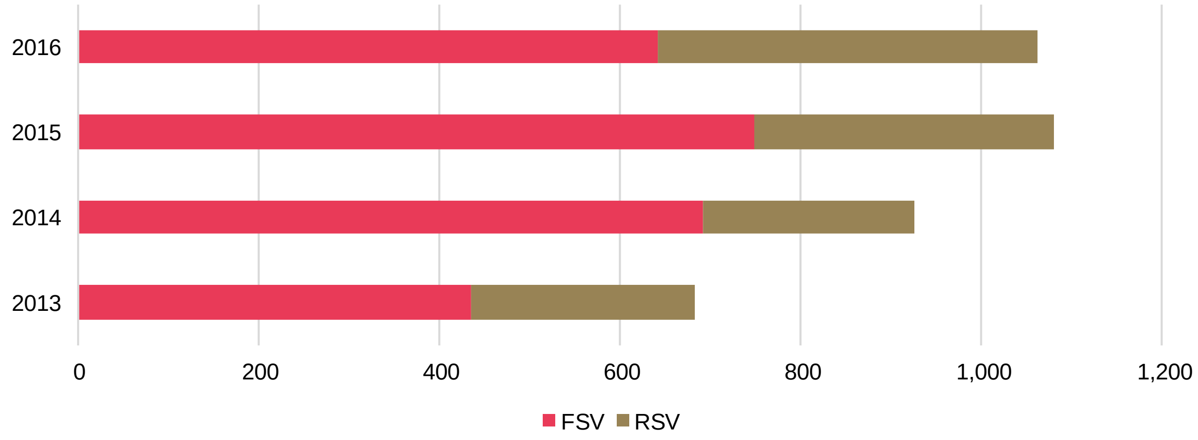
December 2016

TSV have increased by 15% in Nelson compared to an average of the three years from 2013 to 2015. This was driven by the schools and ITP sectors. TSV declined slightly by 2% flat from 2015 to 2016, FSVs declined by 14%, while RSVs increased by 26%.

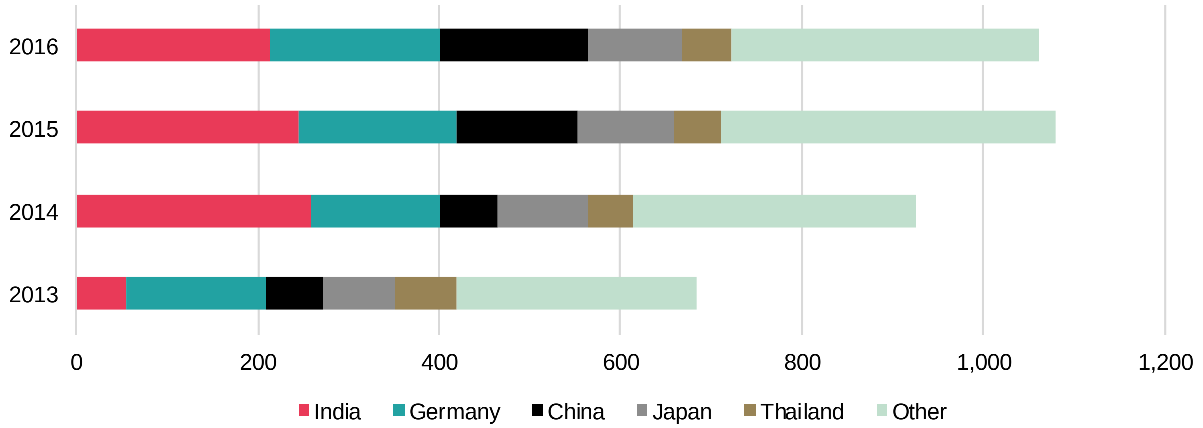
Student visas approved for Nelson 2013-2016



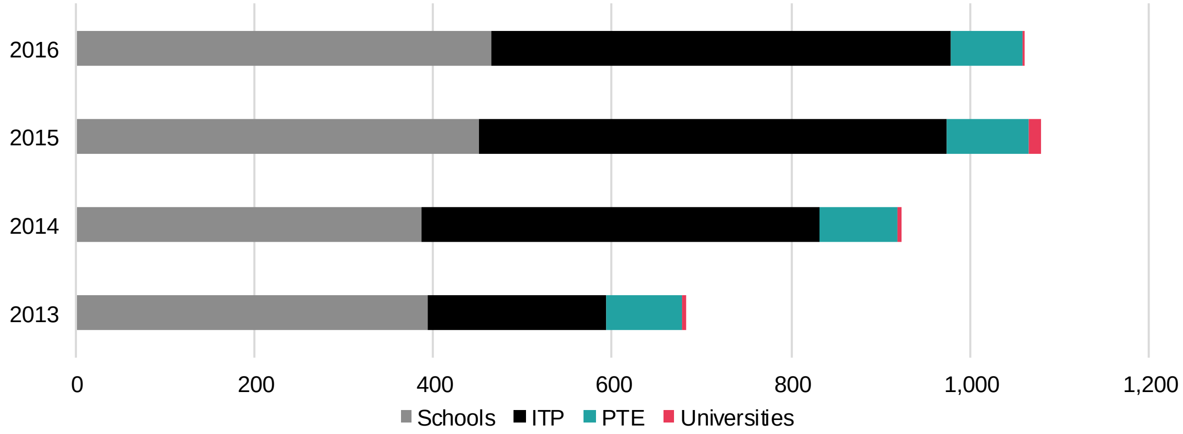
Nelson : Cumulative total for RSV and FSV, 2013-2016



Nelson: Total student visas approved in the five most significant markets



Sector breakdown for TSV for Nelson YTD



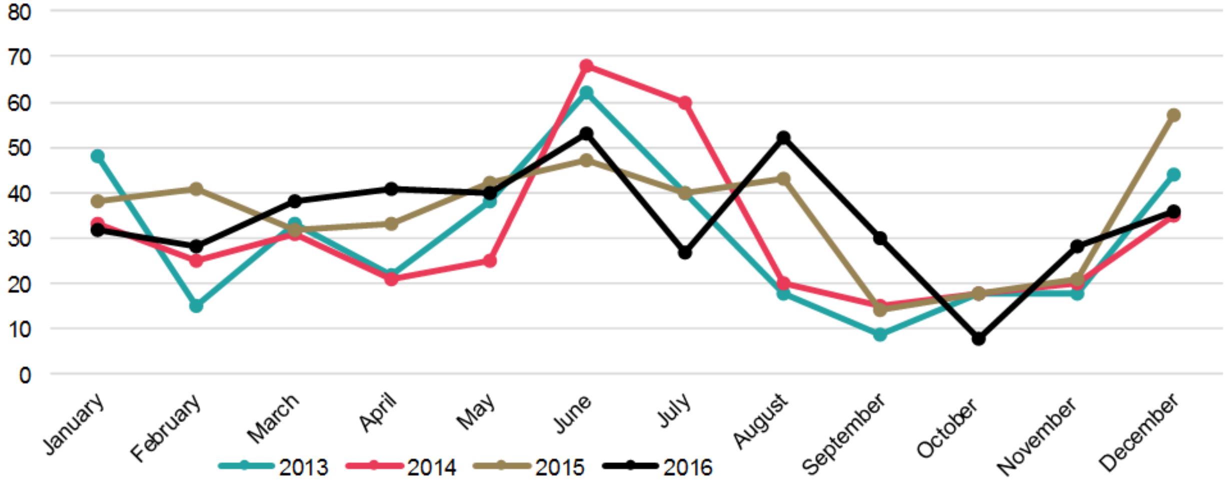
1,062	Visas issued in 2016 compared to an average of the previous three years	RSV	148	↑	44%	FSV	18	→	2%	TSV	166 ↑ 15%
152	Visas issued in December 2016 compared to previous two Decembers	RSV	3	↑	9%	FSV	25	↑	28%	TSV	28 ↑ 23%

Northland

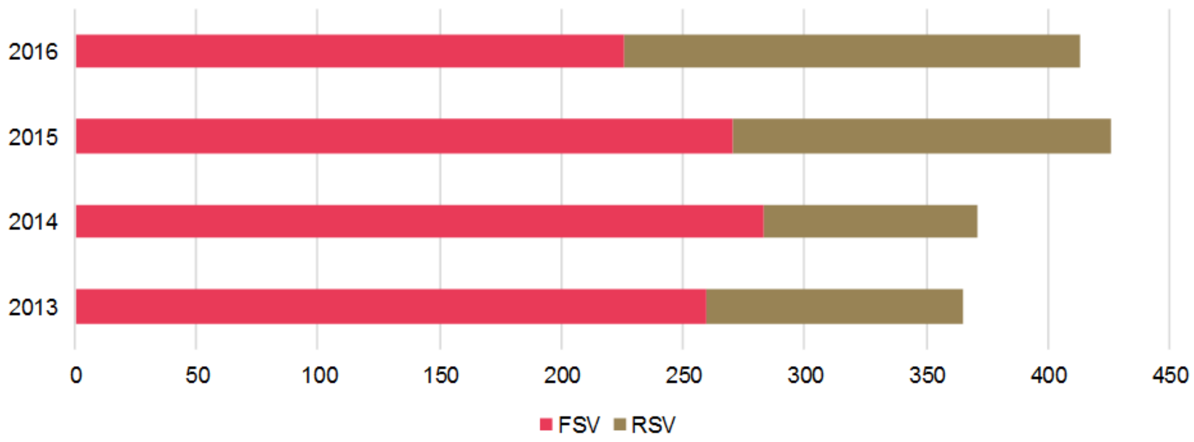
December 2016

TSV for Northland increased by 6% compared to the average of the previous three years. The main driver of this was ITPs. Visas issued to school students have declined since 2013. The ITP sector also drove the -3% decline in visas issued from 2015 to 2016.

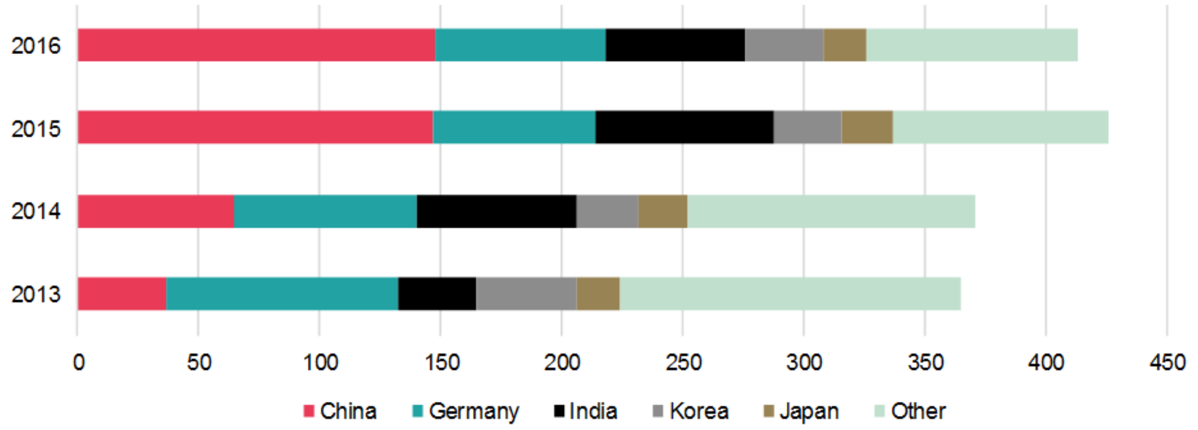
Student visas approved for Northland 2013-2016



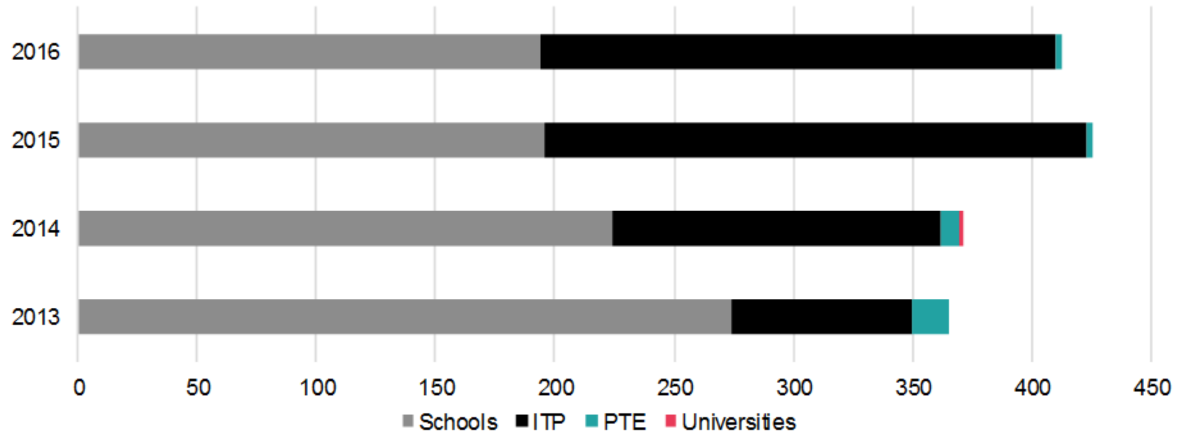
Northland : Cumulative total for RSV and FSV, 2013-2016



Northland: Total student visas approved in the five most significant markets



Sector breakdown for TSV for Northland YTD



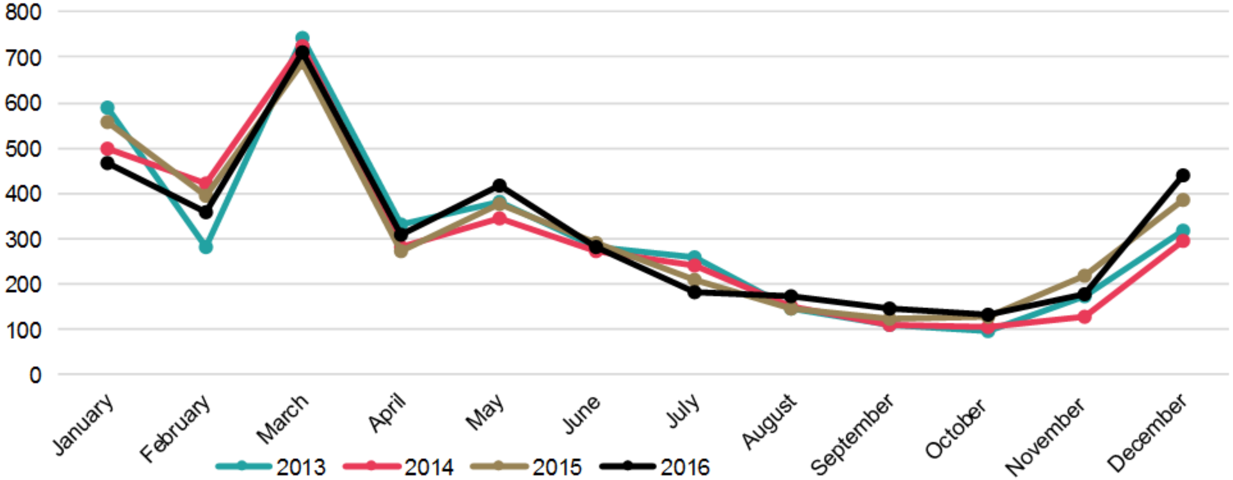
413	Visas issued in 2016 compared to an average of the previous three years	RSV	71	⇧	46%	FSV	-	45	⇩	-17%	TSV	26 ⇧	6%
36	Visas issued in December 2016 compared to previous two Decembers	RSV	2	⇧	33%	FSV	-	12	⇩	-28%	TSV -	10 ⇩	-22%

Otago

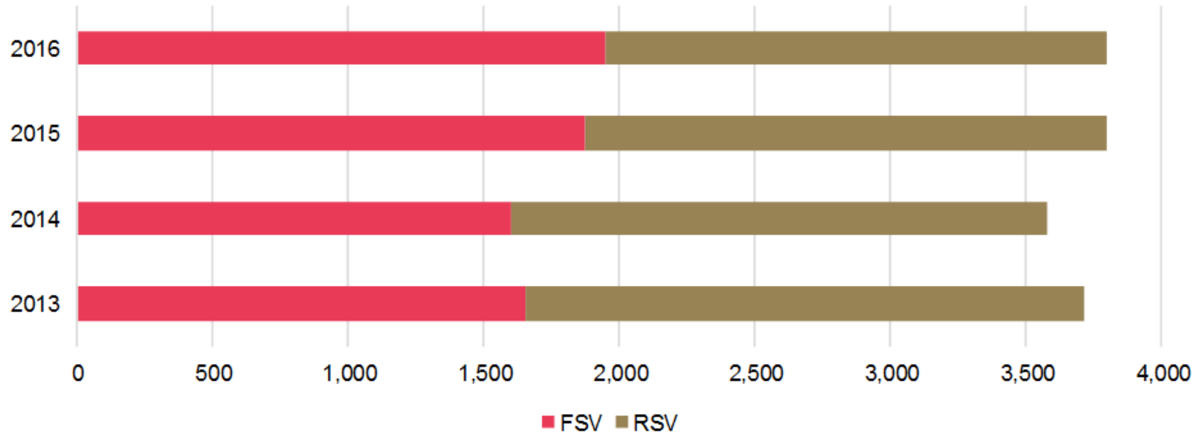
December 2016

Otago has been relatively stable in 2016 compared to the average of the previous three years. ITP sector TSV have increased from 2015 to 2016, while universities sector TSV have declined, keeping the whole region's results relatively unchanged. Over 70% of international students in Otago are in the universities sector.

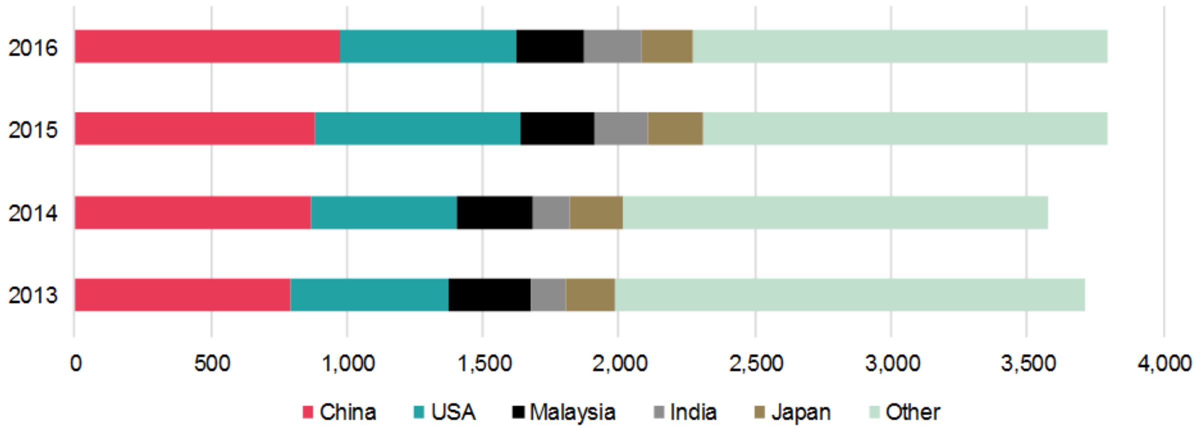
Student visas approved for Otago 2013-2016



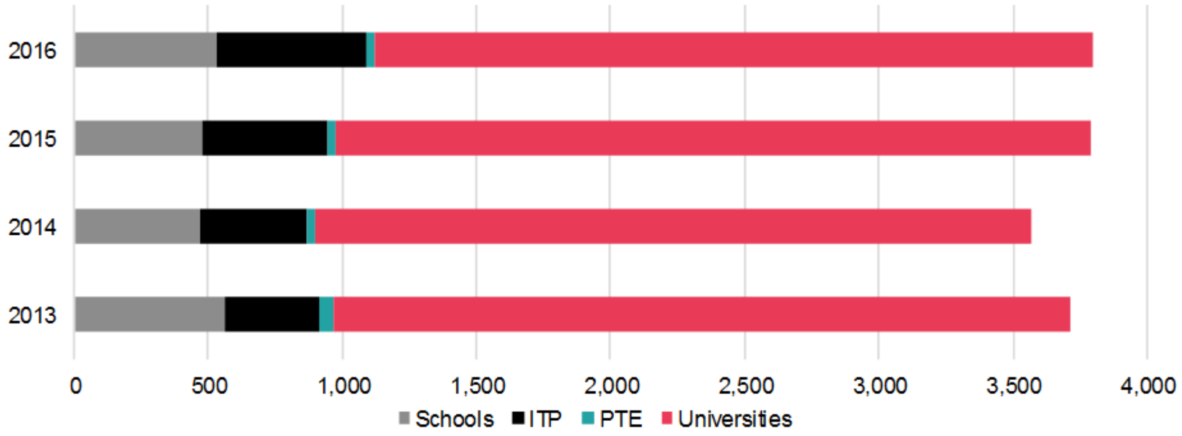
Otago : Cumulative total for RSV and FSV, 2013-2016



Otago: Total student visas approved in the five most significant markets



Sector breakdown for TSV for Otago YTD



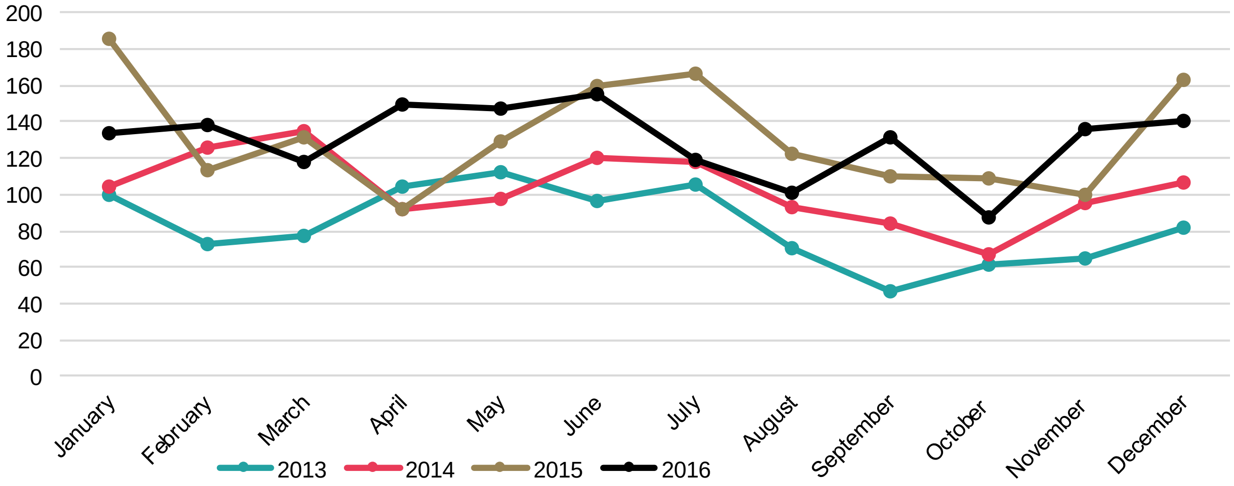
3,799	Visas issued in 2016 compared to an average of the previous three years	RSV -	133	↓	-7%	FSV	238	↑	13%	TSV	105 → 3%
441	Visas issued in December 2016 compared to previous two Decembers	RSV	16	↑	20%	FSV	84	↑	32%	TSV	99 ↑ 29%

Southland

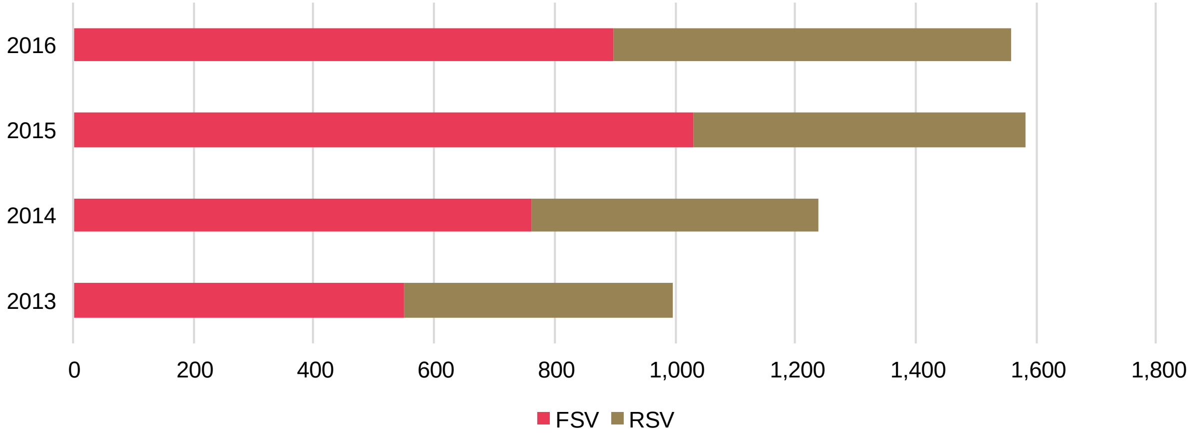
December 2016

There has been an 18% increase in TSVs for Southland compared to the average of the previous three years, driven by increases in the ITP and PTE sectors. In 2016, the schools sector declined when compared to 2015. This 10% decline in the schools sector resulted in an overall 2% decline in TSV from 2015 to 2016.

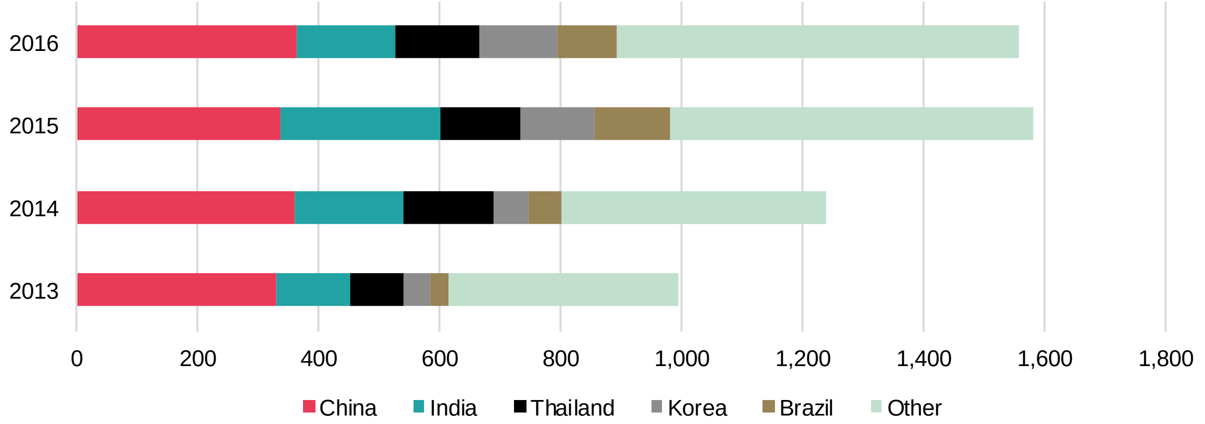
Student visas approved for Southland 2013-2016



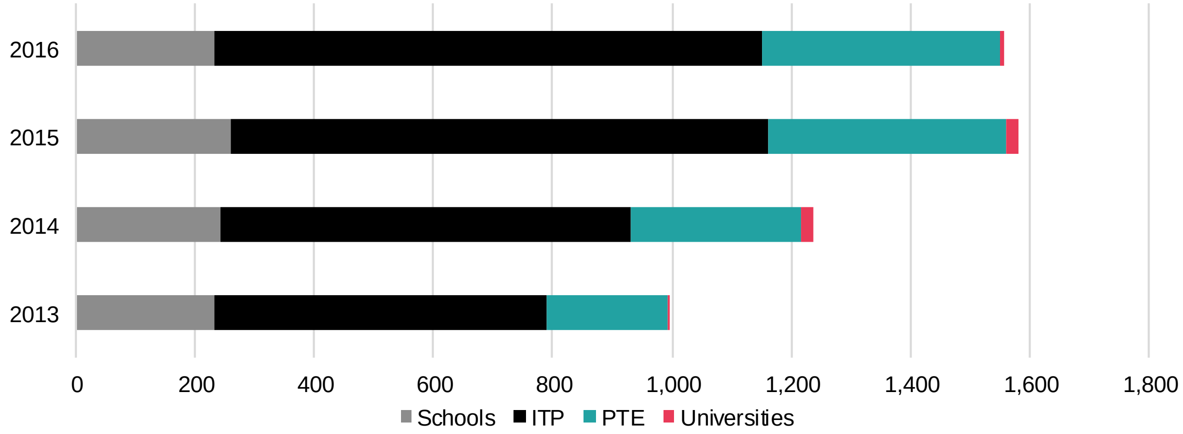
Southland : Cumulative total for RSV and FSV, 2013-2016



Southland: Total student visas approved in the five most significant markets



Sector breakdown for TSV for Southland YTD



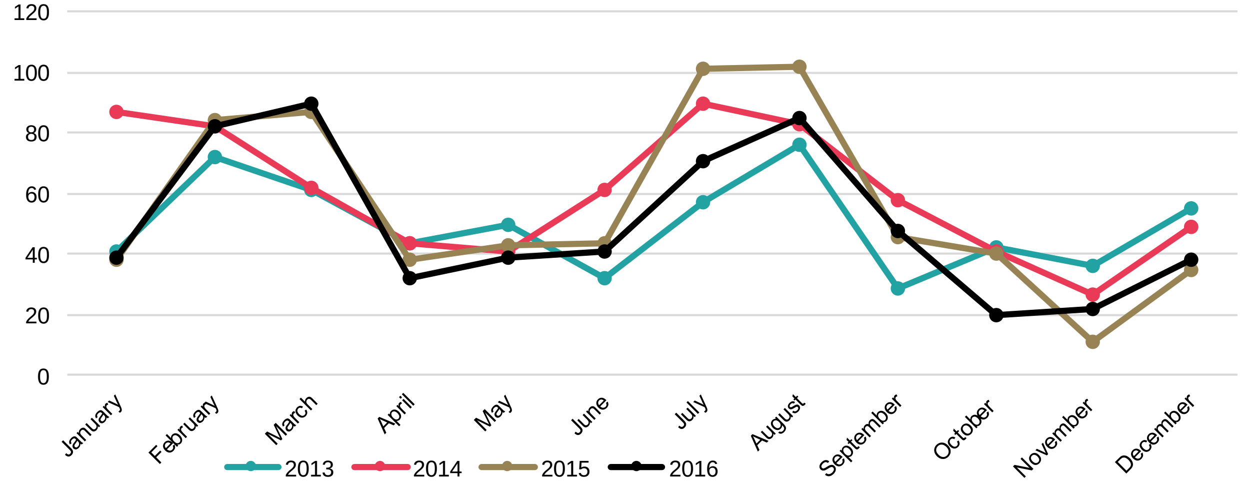
1,557	Visas issued in 2016 compared to an average of the previous three years	RSV	167	30%	FSV	118	11%	TSV	285	18%
140	Visas issued in December 2016 compared to previous two Decembers	RSV	19	54%	FSV	- 14	-14%	TSV	5	4%

Taranaki

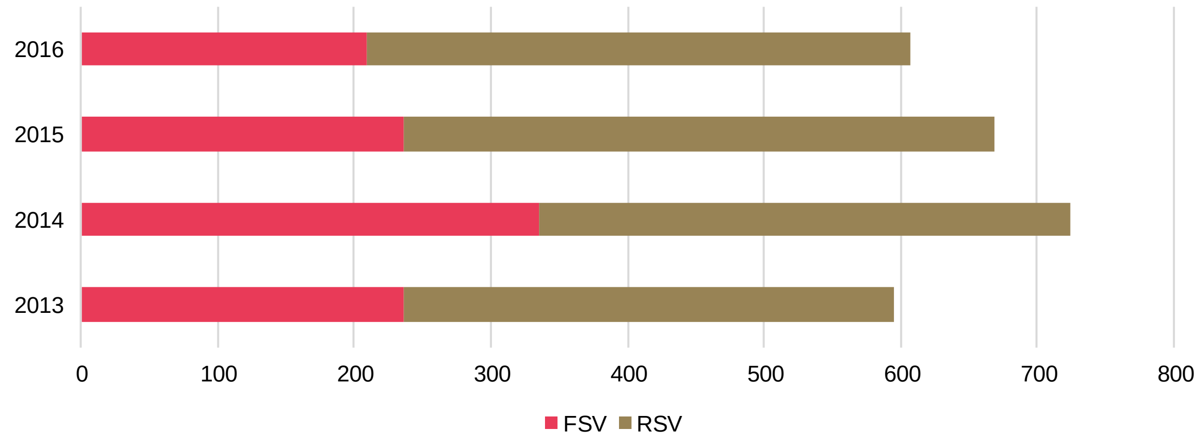
December 2016

The Taranaki region has shown a decline in TSV in 2016 compared to an average of the previous three years. The decline is driven by the PTE sector, which made up 60% of international students in 2016.

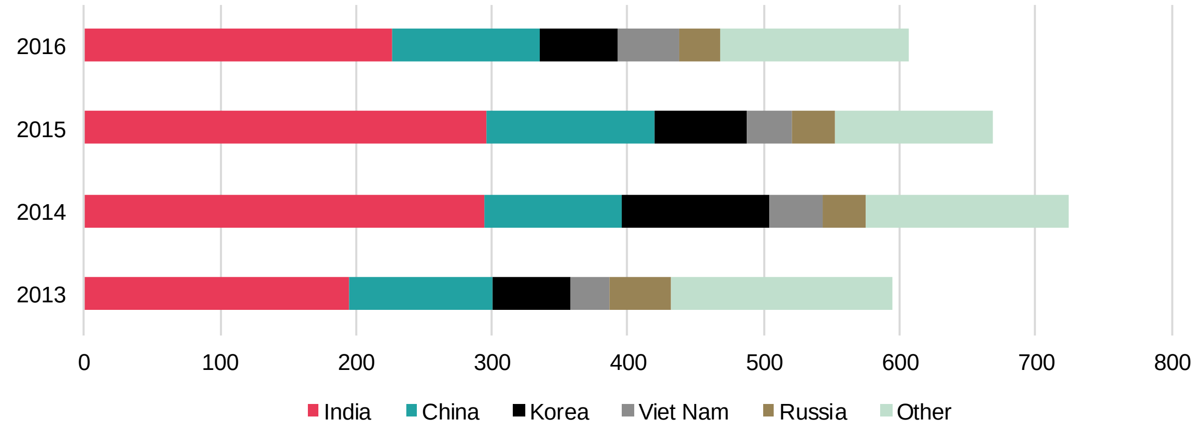
Student visas approved for Taranaki 2013-2016



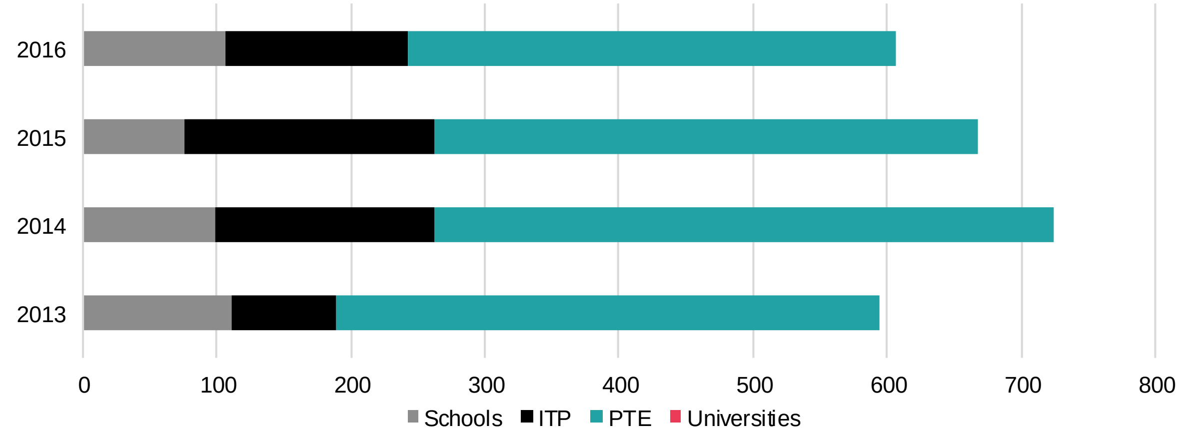
Taranaki : Cumulative total for RSV and FSV, 2013-2016



Taranaki: Total student visas approved in the five most significant markets



Sector breakdown for TSV for Taranaki YTD



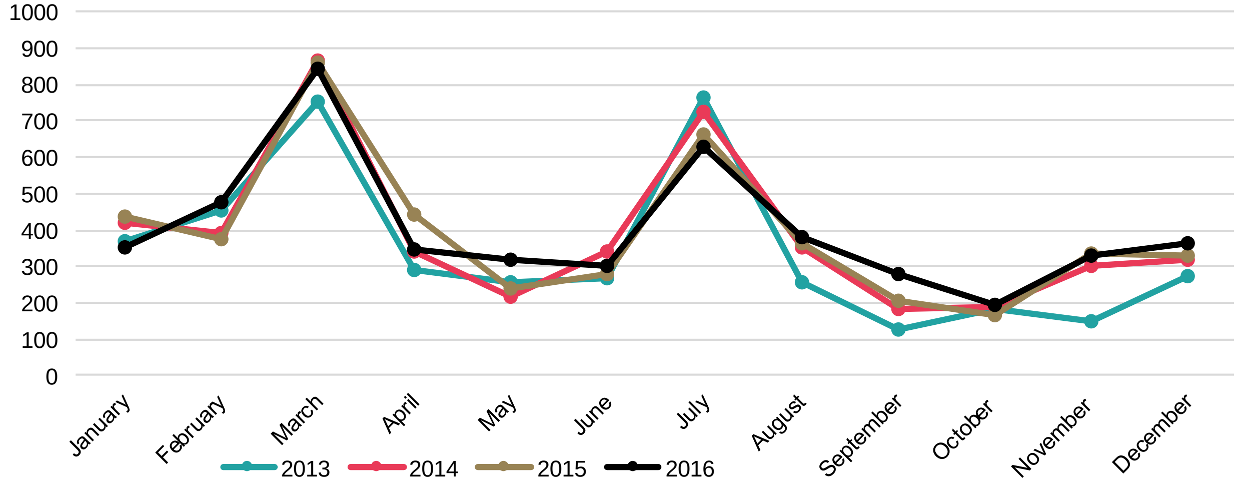
607	Visas issued in 2016 compared to an average of the previous three years	RSV	4	1%	FSV -	60	-25%	TSV -	56	-8%
38	Visas issued in December 2016 compared to previous two Decembers	RSV	2	10%	FSV -	6	-20%	TSV -	4	-10%

Waikato

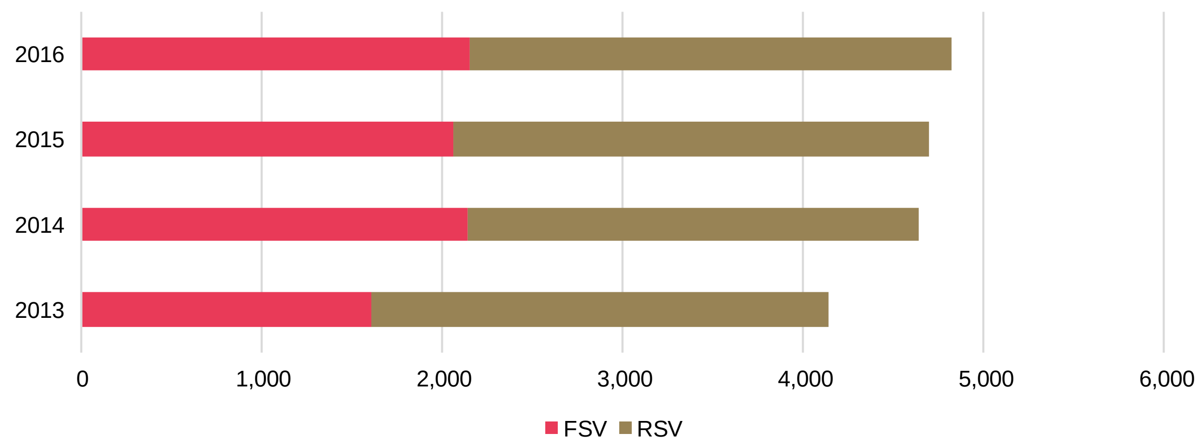
December 2016

TSVs increased by 7% in 2016, when compared to the previous three years. This was driven by increases in TSVs for the ITP and schools sectors. Waikato showed an increase in students from China and India. Unusually, the number of Indian students for 2016 has increased by 3% since 2015.

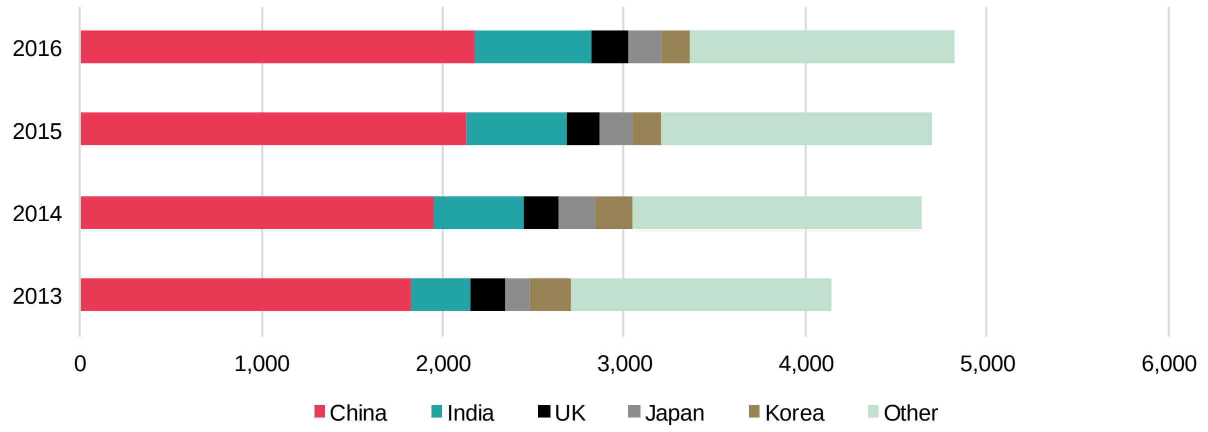
Student visas approved for Waikato 2013-2016



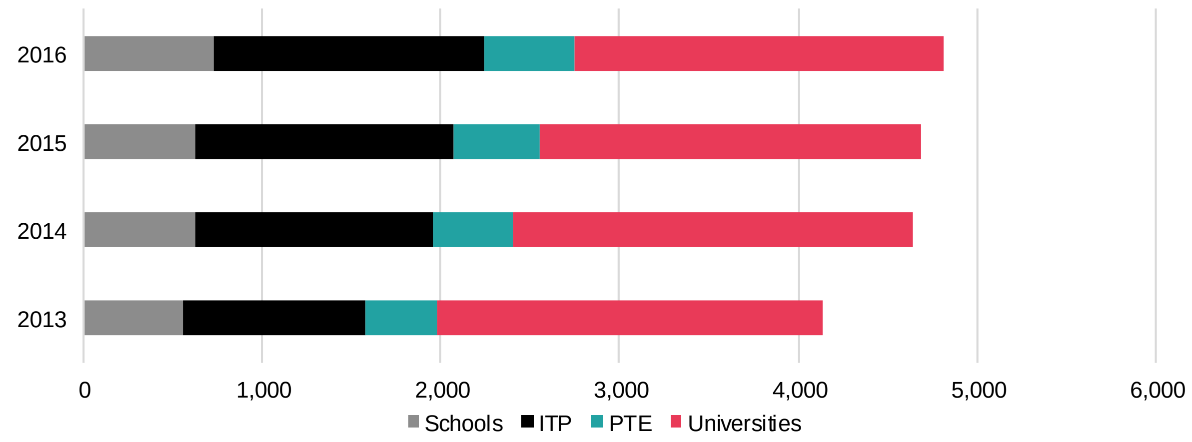
Waikato : Cumulative total for RSV and FSV, 2013-2016



Waikato: Total student visas approved in the five most significant markets



Sector breakdown for TSV for Waikato YTD

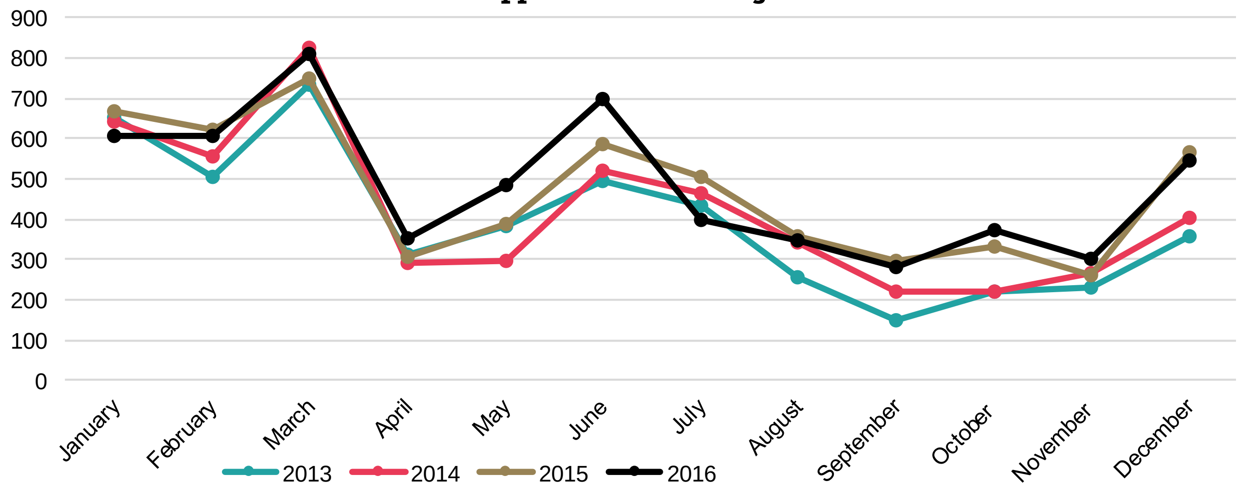


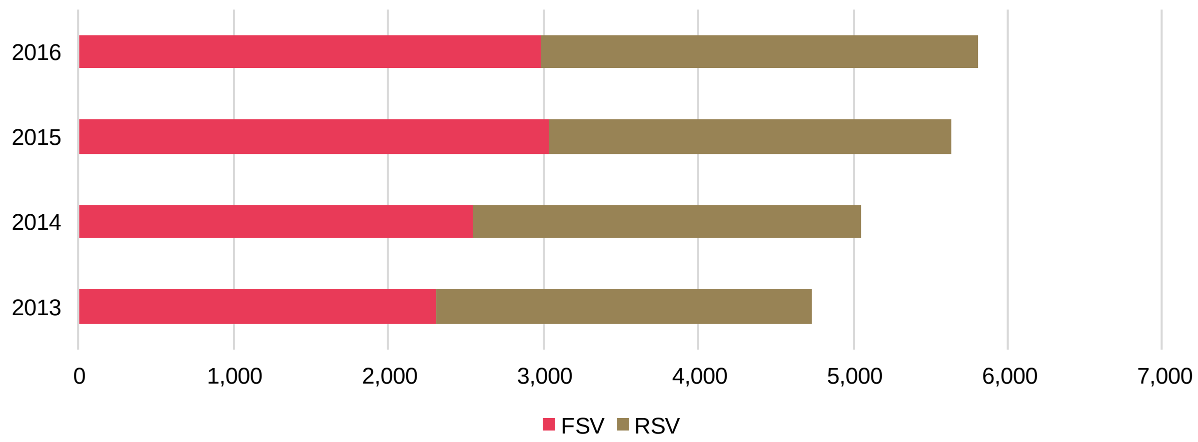
4,818	Visas issued in 2016 compared to an average of the previous three years	RSV	112	4%	FSV	212	10%	TSV	324	7%
366	Visas issued in December 2016 compared to previous two Decembers	RSV	32	36%	FSV	11	5%	TSV	43	13%

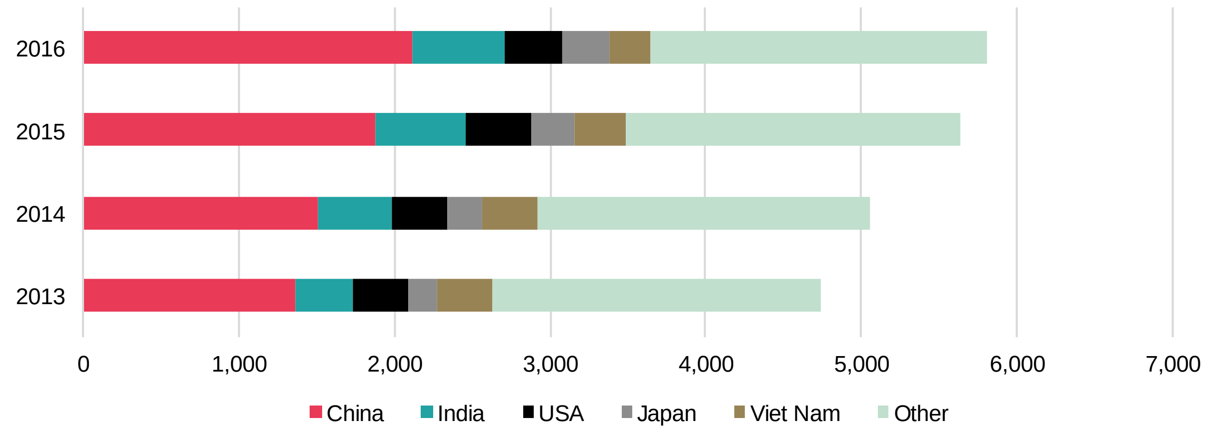
Wellington

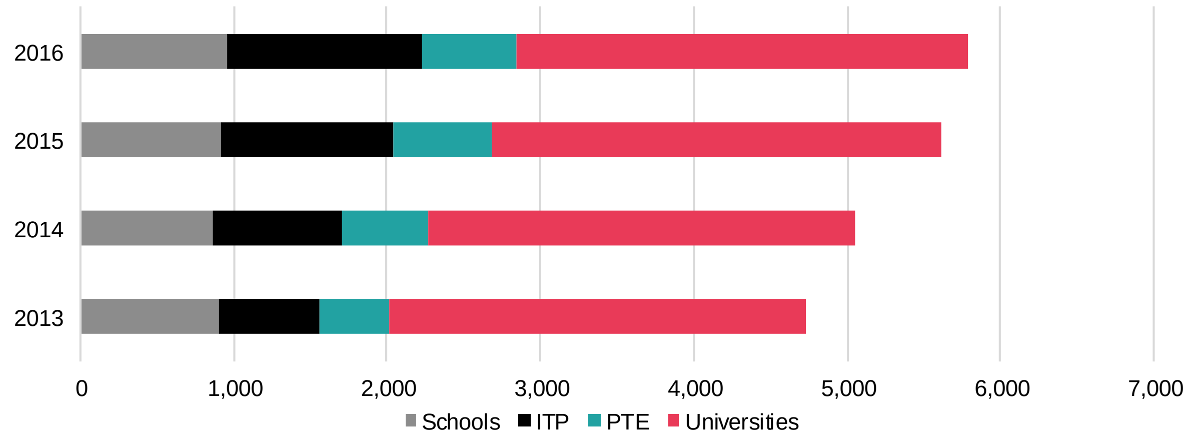
December 2016

There was a 12% increase in the number of international student visas for the Wellington region, which was mainly driven by the ITP sector. Universities and schools have been stable in terms of student numbers. Wellington has also seen an overall increase in Chinese and Indian TSV.









5,805	Visas issued in 2016 compared to an average of the previous three years	RSV	308	↑	12%	FSV	352	↑	12%	TSV	660	↑ 12%
546	Visas issued in December 2016 compared to previous two Decembers	RSV	9	↑	9%	FSV	54	↑	14%	TSV	62	↑ 13%