

Visa Dashboard: May 2017

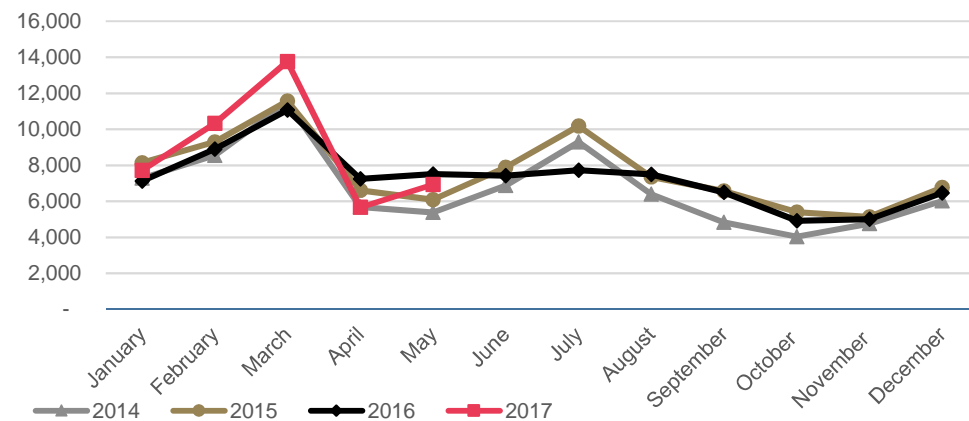


44,389 total student visas (TSV) year to date (YTD), up 6% (+2,541) on YTD 2016. **17,705** first-time student visas (FSV), up 5% (+909) on YTD 2016. **26,684** returning student visas (RSV), up 7% (+1,632) on YTD 2016.

Overview

- TSV for May 2017 declined by 8% (-580) compared to May 2016. This decline reflects reduced Indian PTE applications this year.
- Despite the April and May TSV decreases, TSV remain up 6% (+2,541) on the YTD 2016, while FSV are up by 5% (+909) for the same period.
- China continues to dominate growth, but we are seeing growth from the USA, South East Asia and Latin America markets.
- The India market continues to rebalance. There was a 42% (-4,800) decrease for India PTE VSV. However, India VSV for universities increased (+29%, +323).
- All sectors except the PTE sector, have increased in TSV in the 2017 YTD.
- FSV YTD for the PTE sector are down due to a 24% decrease in the India market.

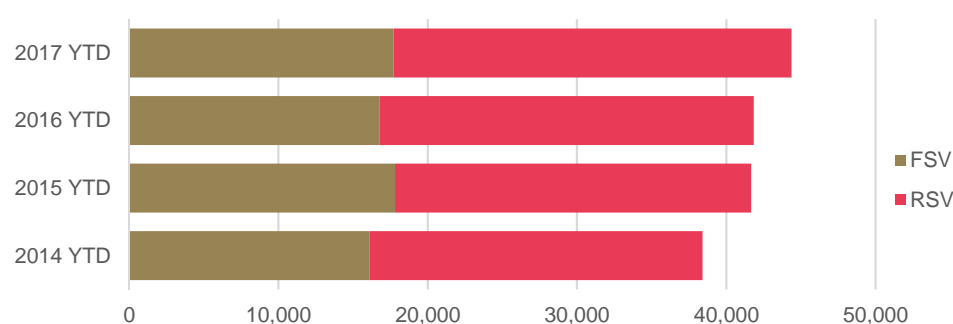
TSV issued in 2014-2017



- Universities sector FSV grew by 19% (+850) compared to the YTD 2016. This growth came from increased FSV.

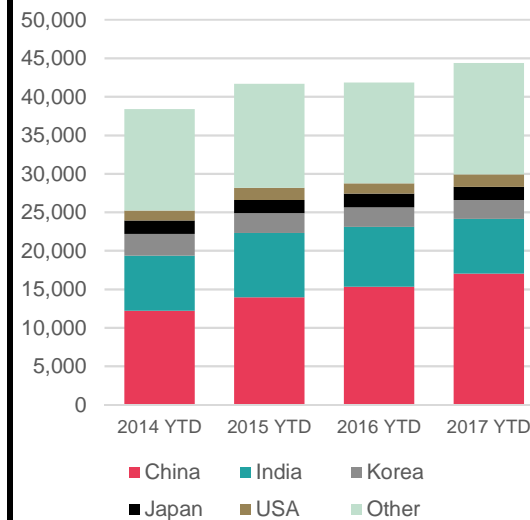
- Valid student visa (VSV) numbers for 1 June 2017 are up 2% (+1,130) on 1 June 2016 which suggests total enrolments will be slightly up on 2016. However, ITP enrolments are likely to be flat, while PTE enrolments are likely to be down

Visa composition by YTD YTD 2014-2017



Markets

TSV by market



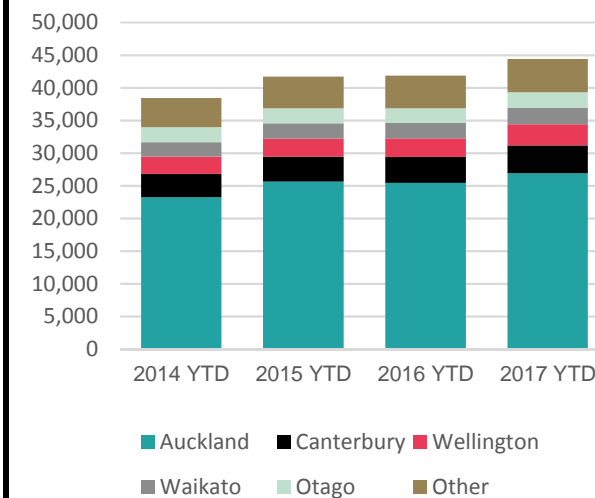
- TSV for most key markets increased YTD (particularly China — up +1,708 or 11%).

- Key markets with FSV YTD increases were China (+9%, +295), USA (+25%, +287), Viet Nam (+95%, +217), Brazil (+24%, +160), Chile (81%, +154) and Colombia (+50%, +152).

- India is in the process of rebalancing: FSV YTD declined for the PTE sector (-47%, -882), but increased for the universities (+46%, +155) sector.

Regions

TSV by region



- FSV increased for the Auckland (+4%, +373), Wellington (+20%, +243), Waikato (+29%, +248) and Otago (+17%, +162) regions. All of these increases came from the universities sector.

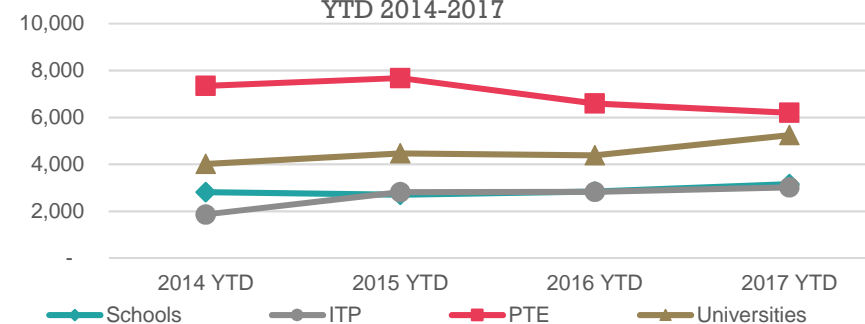
- FSV decreased for Hawke's Bay (-39%, -105) and Bay of Plenty (-12%, -96). For Hawke's Bay, this decrease was for the PTE sector, while in the Bay of Plenty, the PTE and ITP sectors led the decrease in FSV.

Sectors

- Universities sector FSV grew by 19% (+850) compared to the YTD 2016. This growth came from increased FSV for the USA (+24%, +266), India (+46%, +155) and Viet Nam (+191%, +122) markets.

- Schools sector FSV grew by 11% (+312) compared to the YTD 2016. This growth came from FSV for secondary schools for the Chile (+260%, +78), Brazil (+45%, +66), and Italy (+107%, +61) markets.

FSV by sector YTD 2014-2017



- ITP sector FSV increased by 7% (+192) compared to the YTD 2016. Most of this increase has been confined to Auckland (+22%, +263), while Canterbury (-32%, -77) and Bay of Plenty (-15%, -51) decreased in FSV.

- PTE sector FSV decreased (-6%, -398) compared to the YTD 2016, which was caused by a decrease in visas for the India market (-47%, -882). The decrease in the India market was offset by increases in the Latin America (+38%, +378) South East Asia (+20%, +154) and China (+13%, +135)

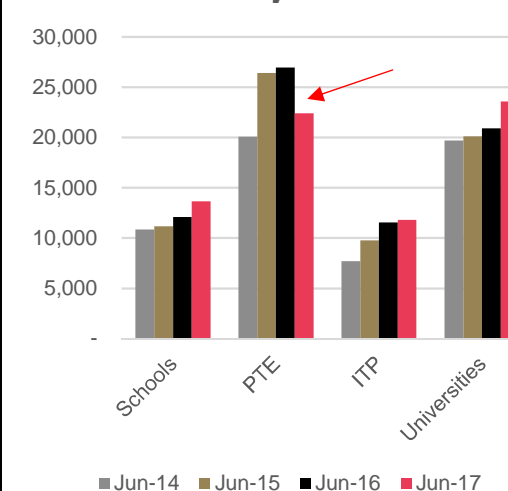
Valid student visas

- Compared to June 2016, VSV for June 2017 have been stable, increasing slightly by 2% (+1,130). This is despite a significant decrease in VSV for the PTE sector (-20%, -4,545 — see arrow on graph).

- Compared to June 2016, VSV for the universities (+11%, +2,659) and schools (+11%, +1,551) sectors have increased while the ITP (+2%, +257) has stayed flat.

- VSV for China increased by 15% (+3,208) followed by VSV for Latin America (+29%, +725), South East Asia (+8%, +651), Europe (+11%, +492) and North America (+13%, +337). These increases have exceeded the 26% (-4,529) decrease in the India market.

VSV by sector



- There was a 42% (-4,800) decrease for India PTE VSV. However, India VSV for universities showed an increase (+29%, +323).

Note: VSV are the number of valid student visas for New Zealand on the first day of the month. It is used as an indicator of student numbers. VSV doesn't differentiate between FSV or RSV. Students on a work or visitor visa are not captured by this dataset so total student numbers will be higher than this data set shows.

1. 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 New Zealand on a working holiday visa who plan on taking up this option are also not included in this dashboard. These factors will impact the PTE (including English Language Schools) numbers. 2. 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. This dashboard excludes dependants, applicants under Section 61, and Variation of Conditions.