

Student Visa Dashboard

Full-year 2015

Overall:

Market and sector overview



Introduction

- *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

Indicator of the overall performance of the market

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

Overall:

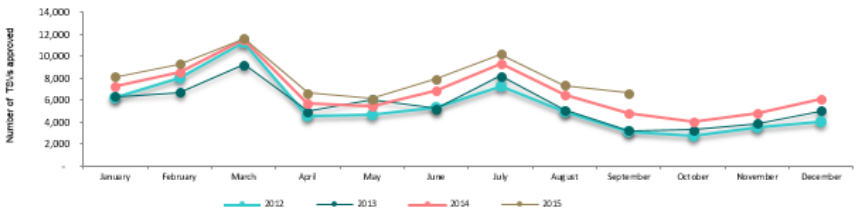
September RSV	September FSV	September TSV
↑ 1,122 58%	↑ 668 23%	↑ 1,790 37%

YTD RSV	YTD FSV	YTD TSV
↑ 4,276 12%	↑ 3,646 12%	↑ 7,922 12%

YTD (January to September)

- The year-to-date result:
- Actual change in visa numbers
 - Percentage change in visas
 - Directional indicator

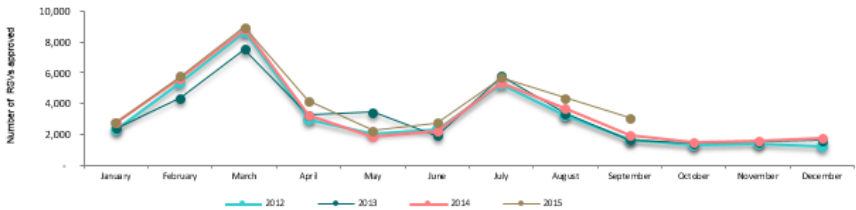
Overall: Total student visas (TSV), 2012 - 2015



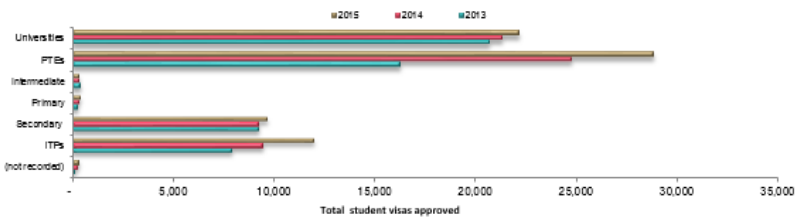
Overall: First time student visas (FSV), 2012 - 2015



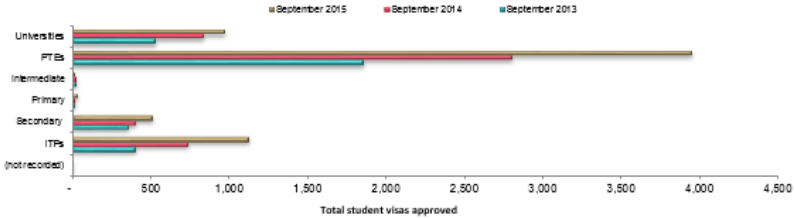
Overall: Renewed student visas (RSV), 2012 - 2015



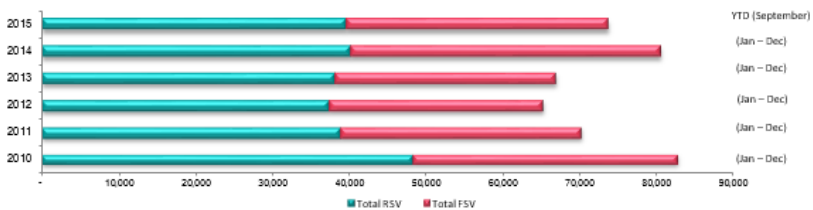
Overall: Total student visas issued by sector, YTD



Overall: Total student visas issued by sector, September



Overall: Cumulative total for RSV vs. FSV, 2010 - 2015



Shows the year-end sector performance of actual TSV numbers.

Shows the monthly sector performance of actual TSV numbers.

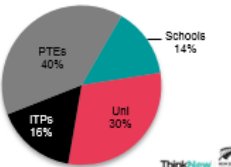
Shows the calendar year results for FSVs + RSVs. This also demonstrates the proportional make-up of a market as we progress through the year, while comparing the overall result from previous years.

Key or interesting trends to consider

Takeaways:

- TSVs, FSVs, and RSVs are all showing strong growth YTD (up 12%).
- September has been particularly positive, with FSVs up 23% and RSVs up 58%.
- The majority of YTD growth has been driven by PTEs and ITPs, together contributing an additional 6,555 TSVs.

YTD 2015 sector breakdown of TSVs



This pie graph represents the sector distribution of TSVs YTD.

Key trends

Full-year 2015

- 2015 was a strong year for student visa approvals with an additional 10,407 total student visas (TSV) approved, a 13% increase when compared to 2014. First time student visas (FSV) accounted for 45% of this increase with FSVs up 12% (4,653) on 2014.
- The number of students renewing their student visas increased significantly in 2015 with an additional 5,754 student visa renewals (RSV) on 2014. Just over half (51%) of the RSV growth was from the India.
- 2015 growth in TSVs was driven by India, China, the Philippines, the USA, and Brazil.
- The ITPs, PTEs, and universities have experienced the strongest YTD growth in FSVs, up 36% (1,924), 9% (1,284), and 11% (934).

December

- December total student visa approvals were up 13% (770) and FSVs were up 9% (385) on 2014.
- December TSV growth was driven by the USA, China, Japan, Brazil and Thailand.
- Secondary schools, universities and ITPs experienced growth in December TSV while PTEs, primary and intermediate schools declined.

Increases	TSVs for December	Change	% change
	USA	244	87%
	China	206	12%
	Japan	162	31%
	Brazil	105	127%
	Thailand	86	51%

Decreases	Singapore	-14	-40%
	Myanmar	-15	-75%
	Philippines	-20	-20%
	Saudi Arabia	-30	-32%
	India	-219	-17%

FSVs for December	Change	% change
USA	241	88%
Japan	132	32%
Brazil	100	143%
China	47	5%
Viet Nam	43	61%

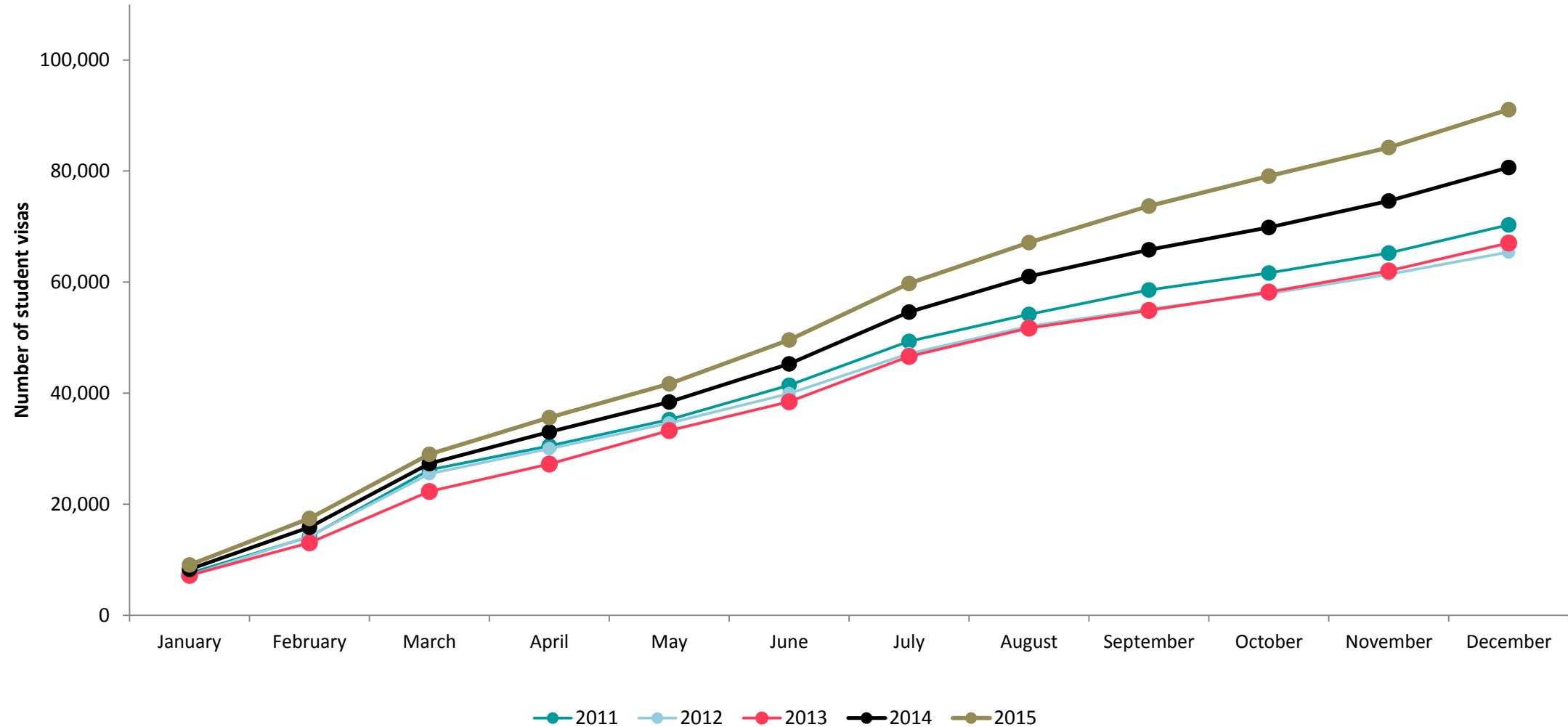
Myanmar	-13	-72%
Tonga	-14	-78%
Philippines	-17	-19%
Malaysia	-22	-31%
India	-336	-30%

Sector TSVs for December	Change	% change
Secondary	392	29%
Universities	336	22%
ITPs	79	10%
Intermediate	-2	-5%
Primary	-11	-29%
PTEs	-22	-1%

Sector FSVs for December	Change	% change
Universities	291	28%
Secondary	281	27%
Intermediate	-1	-4%
ITPs	-8	-1%
Primary	-13	-46%
PTEs	-161	-11%

Tracker

Cumulative total













































Takeaways:

- Full-year 2015 finished above previous years with TSVs up 13% (10,407) on 2014.
- The average monthly increase in TSVs for 2015 was 15%.

Overall performance

Top 20 markets (in order of 2015 volume)

Indicator	YTD TSVs	2014	2015	Change in numbers	% change
	China	25,698	29,640	3,942	15%
	India	17,534	21,093	3,559	20%
	Korea	4,923	4,864	-59	-1%
	Japan	3,433	3,544	111	3%
	USA	2,168	2,824	656	30%
	Philippines	1,419	2,626	1,207	85%
	Thailand	2,243	2,381	138	6%
	Saudi Arabia	2,564	2,044	-520	-20%
	Brazil	1,576	1,933	357	23%
	Germany	1,877	1,769	-108	-6%
	Viet Nam	1,699	1,660	-39	-2%
	Malaysia	1,383	1,453	70	5%
	Hong Kong	1,110	1,166	56	5%
	Colombia	734	942	208	28%
	Sri Lanka	695	928	233	34%
	Taiwan	849	846	-3	0%
	Fiji	899	831	-68	-8%
	Nepal	798	775	-23	-3%
	Indonesia	654	757	103	16%
	Russia	635	634	-1	0%
	Grand Total	80,655	91,062	10,407	13%

Indicator	YTD FSVs	2014	2015	Change in numbers	% change
	India	12,260	12,840	580	5%
	China	7,722	9,032	1,310	17%
	USA	1,846	2,521	675	37%
	Philippines	1,183	2,376	1,193	101%
	Japan	2,026	2,155	129	6%
	Korea	1,999	2,024	25	1%
	Brazil	1,355	1,617	262	19%
	Germany	1,618	1,538	-80	-5%
	Thailand	1,113	1,076	-37	-3%
	Colombia	597	712	115	19%
	Viet Nam	551	620	69	13%
	Malaysia	417	564	147	35%
	Sri Lanka	299	541	242	81%
	Chile	356	451	95	27%
	Great Britain	386	424	38	10%
	Nepal	602	364	-238	-40%
	Indonesia	303	355	52	17%
	France	367	354	-13	-4%
	Saudi Arabia	577	328	-249	-43%
	Bangladesh	238	315	77	32%
	Grand Total	40,418	45,071	4,653	12%

Overall YTD regional performance

(Listed in order of 2015 volume)

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Indicator	YTD TSVs	2014	2015	Change in numbers	% change
	Auckland	50,214	57,362	7,148	14%
	Canterbury	7,175	8,244	1,069	15%
	Waikato	5,701	5,959	258	5%
	Wellington	5,051	5,643	592	12%
	Otago	3,978	4,310	332	8%
	Manawatu	2,598	2,596	-2	0%
	Bay of Plenty	1,801	2,162	361	20%
	Southland	844	1,073	229	27%
	Nelson	920	1,067	147	16%
	Hawke's Bay	752	853	101	13%
	Taranaki	725	668	-57	-8%
	Other	387	565	178	46%
	Northland	458	506	48	10%
	Gisborne	32	26	-6	-19%
	Marlborough	6	15	9	150%
	Grand Total	80,655	91,062	10,407	13%

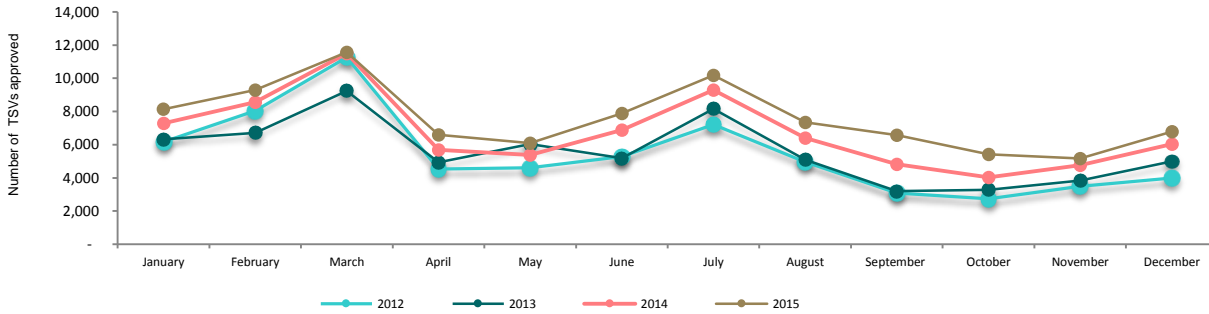
Indicator	YTD FSVs	2014	2015	Change in numbers	% change
	Auckland	24,550	27,296	2,746	11%
	Canterbury	3,742	4,252	510	14%
	Wellington	2,546	3,042	496	19%
	Waikato	2,853	3,012	159	6%
	Otago	1,908	2,269	361	19%
	Bay of Plenty	1,123	1,237	114	10%
	Manawatu	1,072	1,074	2	0%
	Nelson	688	737	49	7%
	Southland	458	643	185	40%
	Hawke's Bay	455	490	35	8%
	Other	303	416	113	37%
	Northland	355	335	-20	-6%
	Taranaki	336	236	-100	-30%
	Marlborough	4	12	8	200%
	Gisborne	14	10	-4	-29%
	Grand Total	40,418	45,071	4,653	12%

Overall:

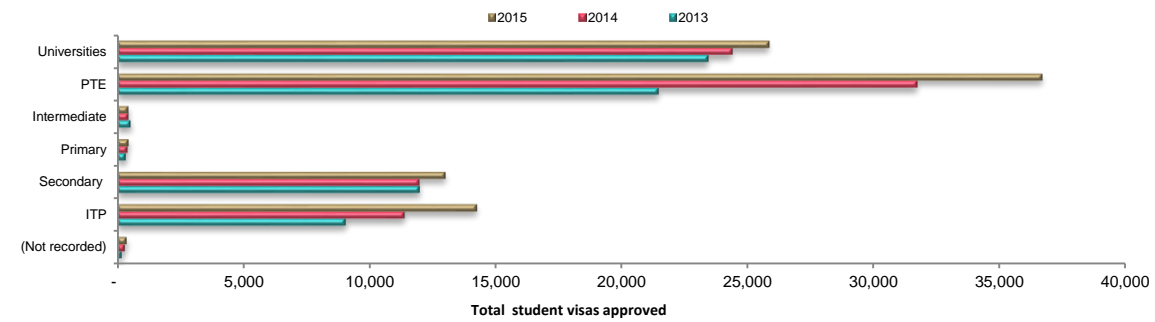


YTD (January-December)

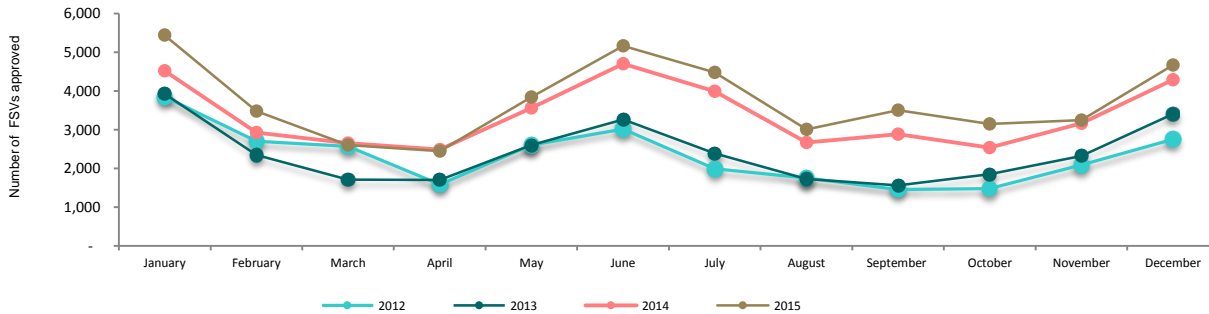
Overall: Total student visas (TSV), 2012 - 2015



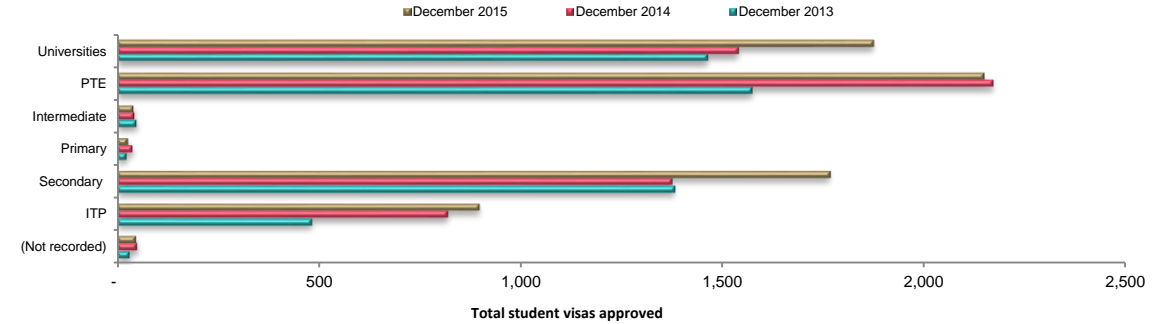
Overall: Total student visas issued by sector, YTD



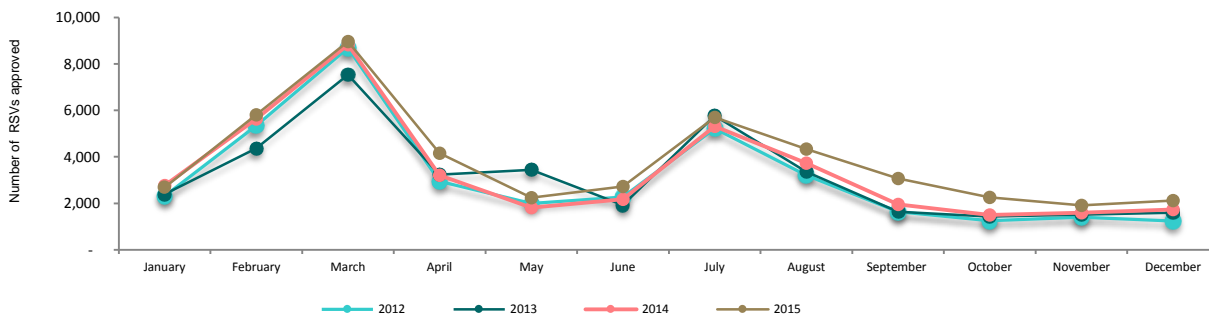
Overall: First time student visas (FSV), 2012 - 2015



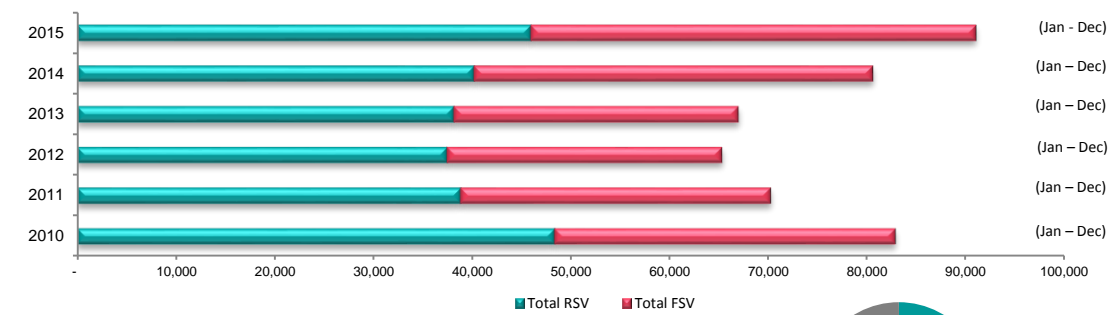
Overall: Total student visas issued by sector, December



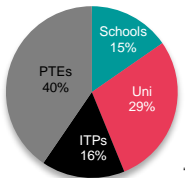
Overall: Renewed student visas (RSV), 2012 - 2015



Overall: Cumulative total for RSV vs. FSV, 2010 - 2015



YTD 2015 sector breakdown of TSVs



Takeaways:

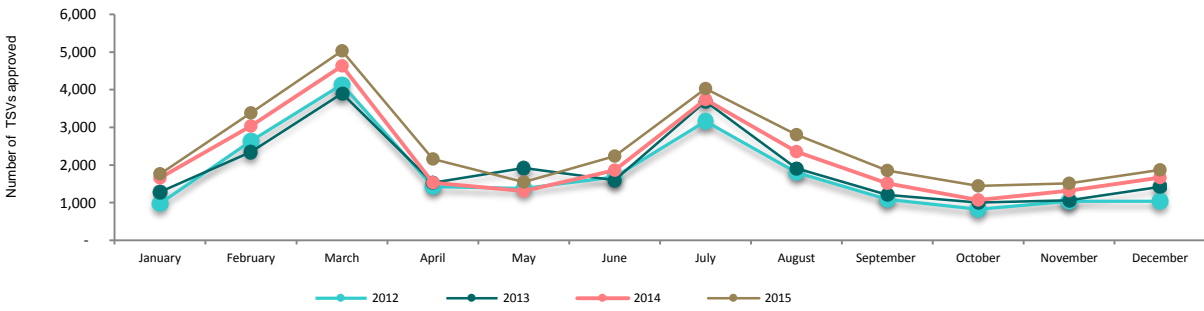
- Full-year TSV and FSVs increased by 13% and 12% (10,407, 4,653), and RSVs increased by 14% (5,754) on 2014.
- December experienced strong results, with FSVs up 9% (385) and TSVs up 13% (770).
- The majority of YTD growth has been driven by PTEs and ITPs, together contributing an additional 7,796 TSVs for 2015.

China:

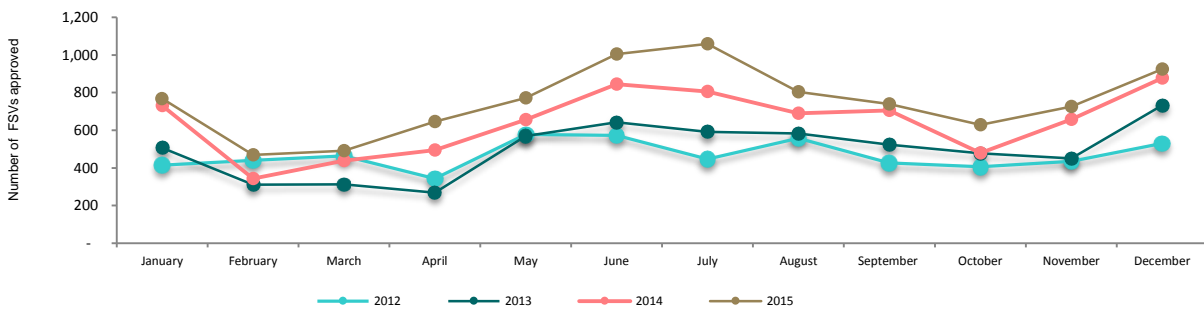
December RSV	December FSV	December TSV
↑ 159 20%	↑ 47 5%	↑ 206 12%

YTD RSV	YTD FSV	YTD TSV
↑ 2,632 15%	↑ 1,310 17%	↑ 3,942 15%

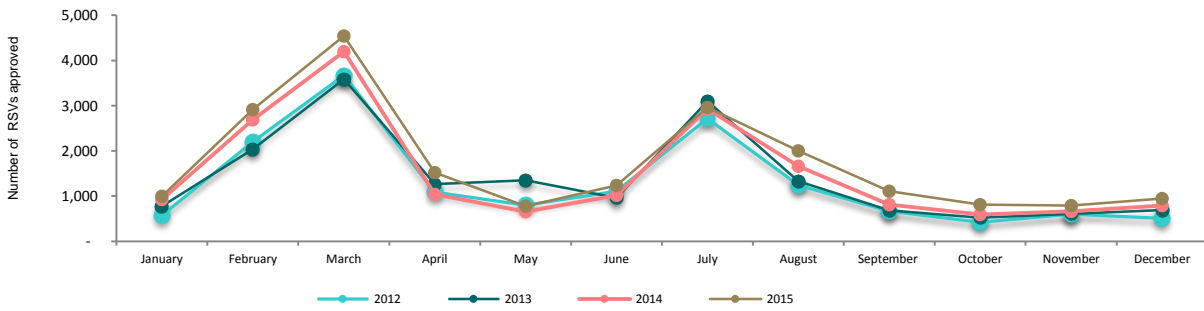
China: Total student visas (TSV), 2012 - 2015



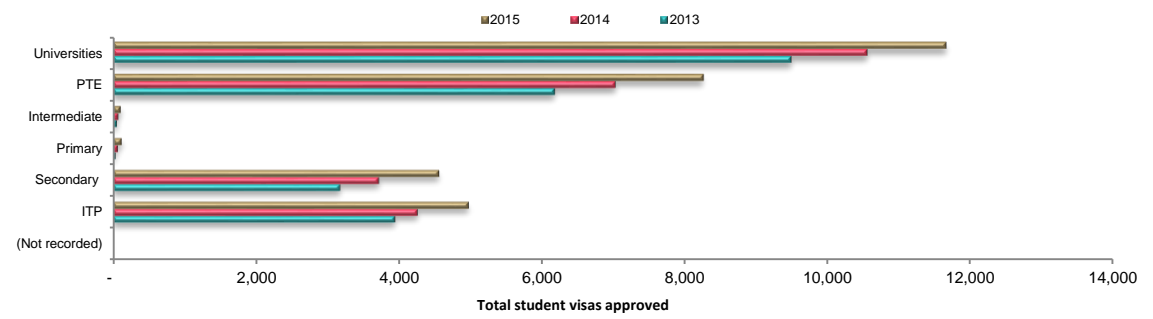
China: First time student visas (FSV), 2012 - 2015



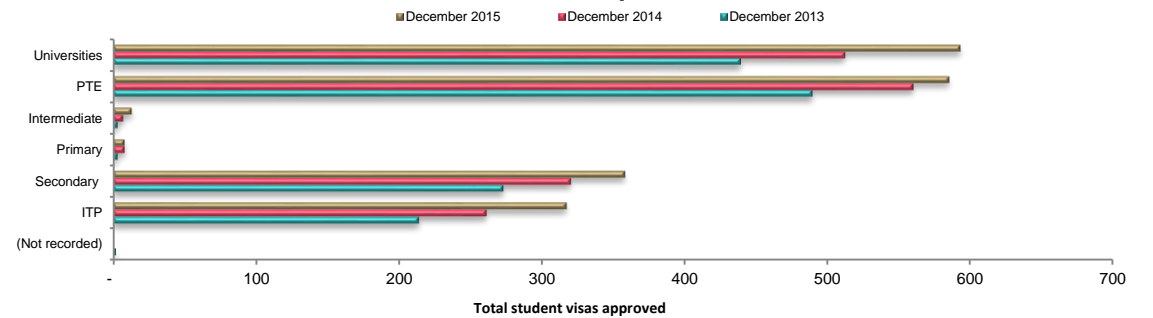
China: Renewed student visas (RSV), 2012 - 2015



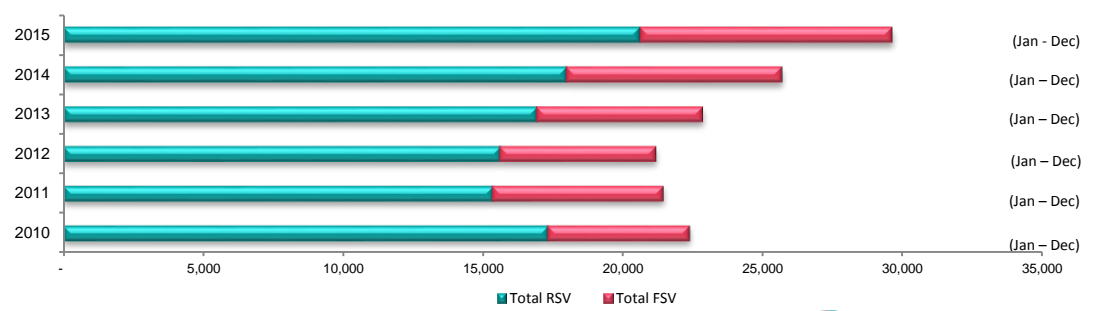
China: Total student visas issued by sector, YTD



China: Total student visas issued by sector, December

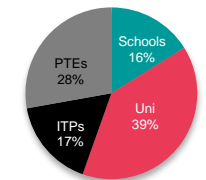


China: Cumulative total for RSV vs. FSV, 2010 - 2015




- Takeaways:
- China experienced strong growth in 2015 with TSVs growing by 15% (3,942) and FSVs up 17% (1,130).
 - December results were strong with TSVs up 12% (206) and RSVs up 20% (159).
 - The university sector made up 39% of TSVs in 2015 followed by the PTEs sector with 28%.

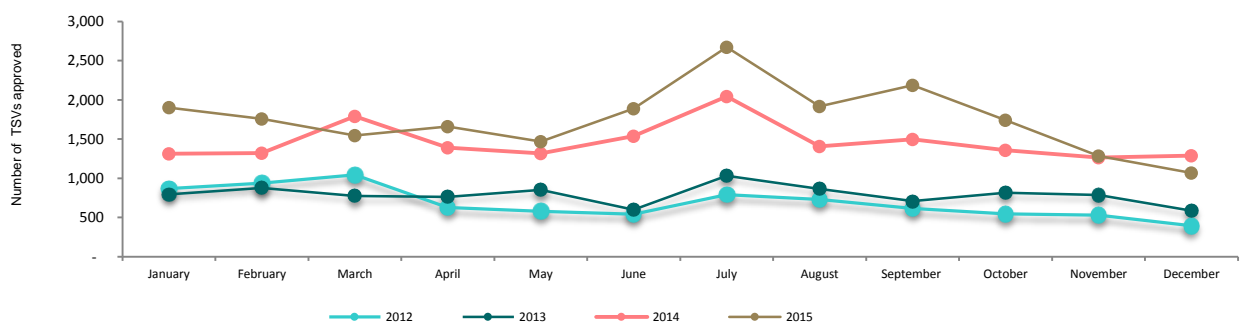
YTD 2015 sector breakdown of TSVs



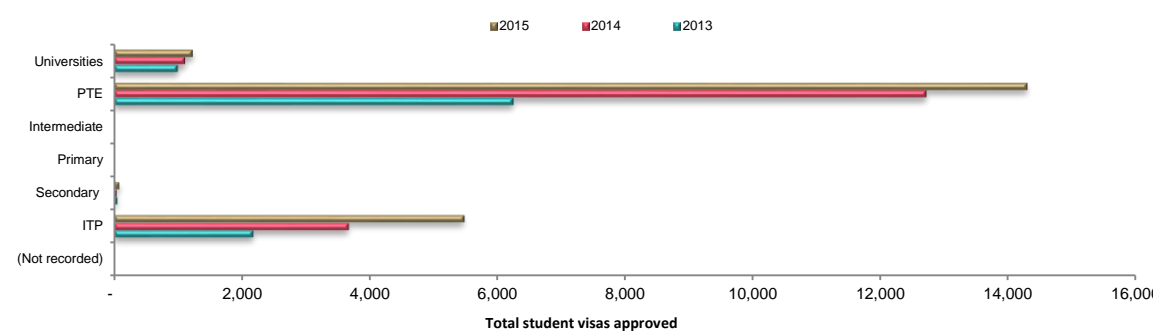
December RSV	December FSV	December TSV
 117 64%	 -336 -30%	 -219 -17%

YTD RSV	YTD FSV	YTD TSV
 2,979 56%	 580 5%	 3,559 20%

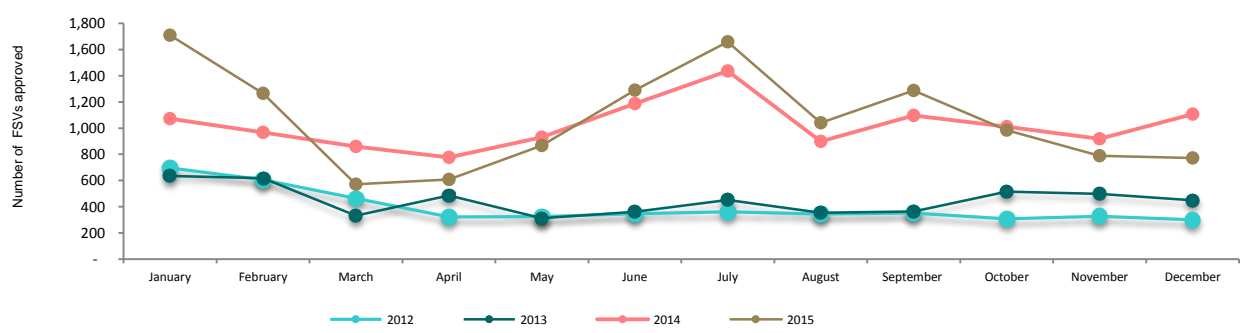
India: Total student visas (TSV), 2012 - 2015



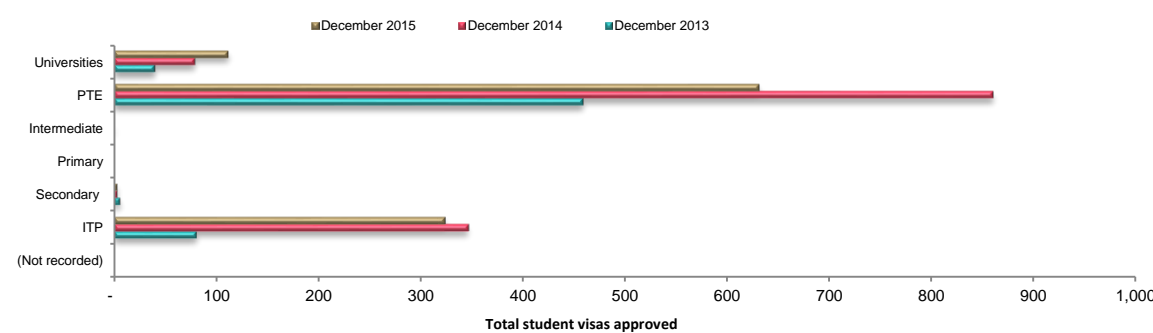
India: Total student visas issued by sector, YTD



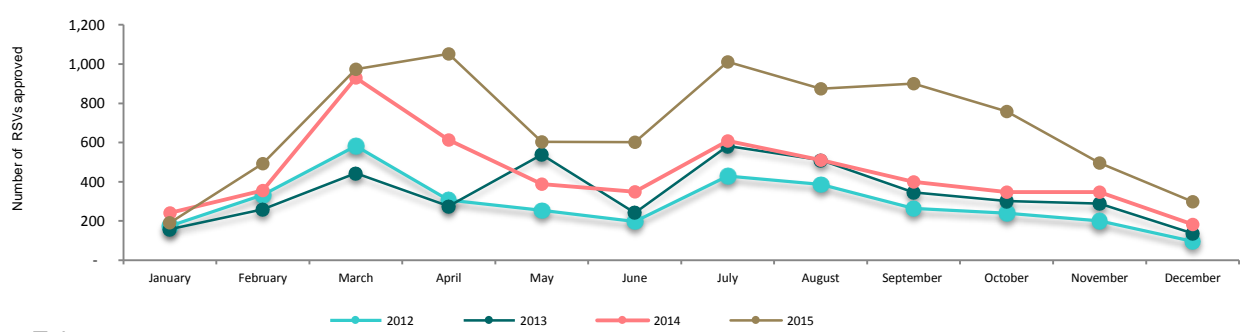
India: First time student visas (FSV), 2012 - 2015



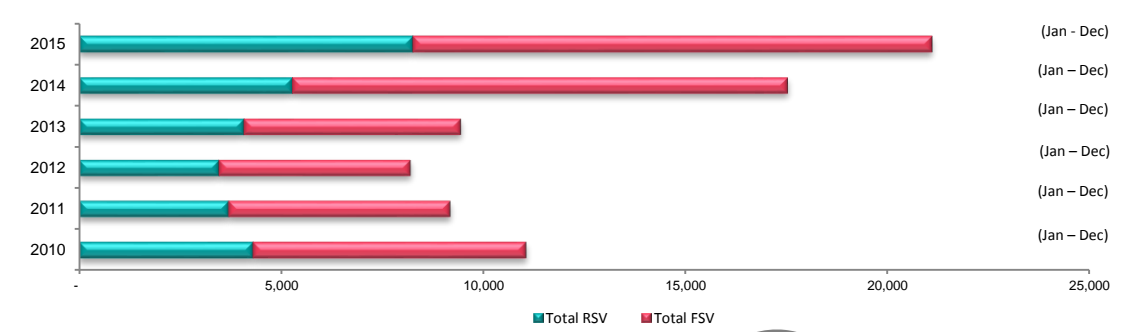
India: Total student visas issued by sector, October



India: Renewed student visas (RSV), 2012 - 2015



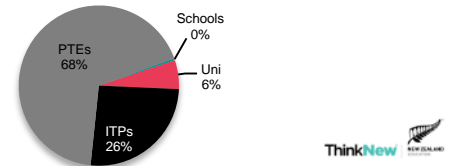
India: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- India experienced strong growth in 2015, predominately driven by returning student visas (RSV) up 56% (2,979) and TSVs 20% (3,559).
- December was mixed with RSVs up 64% (117) and FSVs were down 30% (-336). The decline in FSVs was driven by the PTE sector down 27% (-229) TSVs.
- 84% of the TSVs growth in 2015 was driven by RSV growth.

YTD 2015 sector breakdown of TSVs





December RSV
↑ 57 61%

December FSV
↑ 29 39%

December TSV
↑ 86 51%

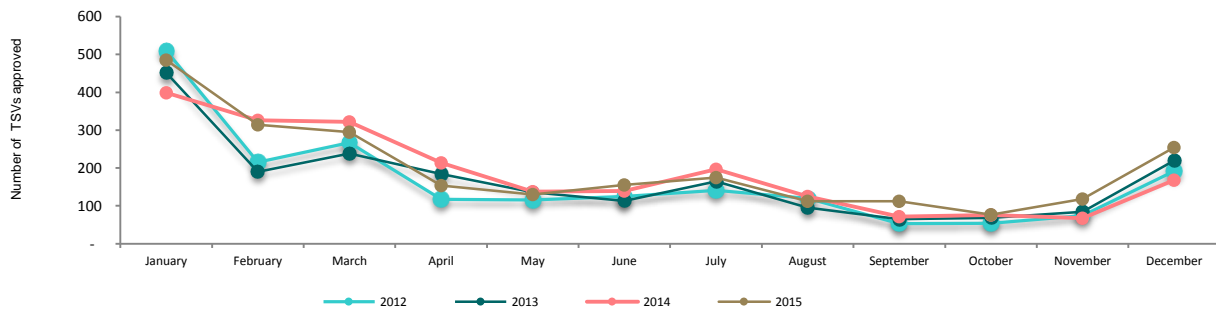
YTD RSV
↑ 175 15%

YTD FSV
↓ -37 -3%

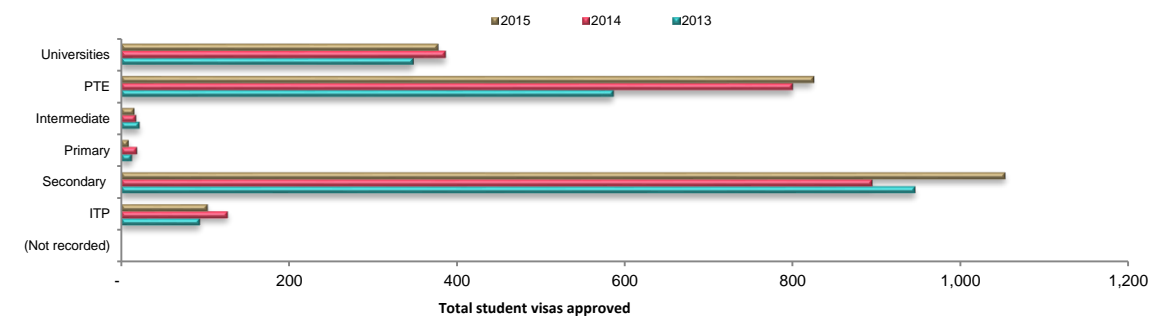
YTD TSV
↑ 138 6%

YTD (January-December)

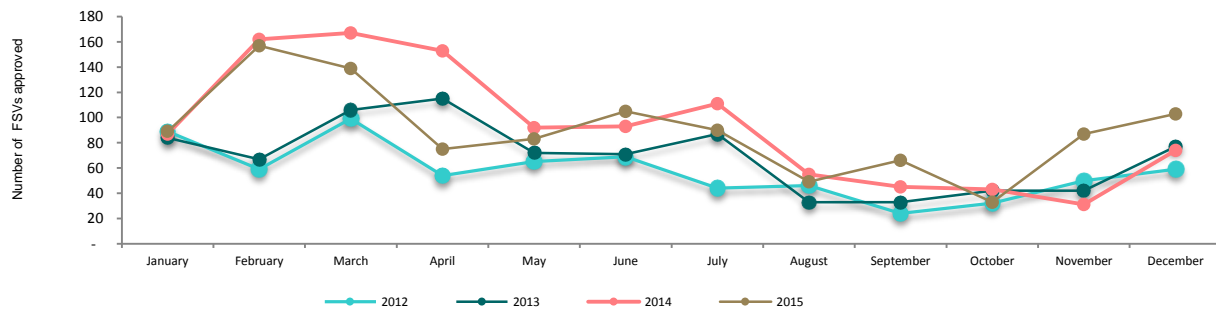
Thailand: Total student visas (TSV), 2012 - 2015



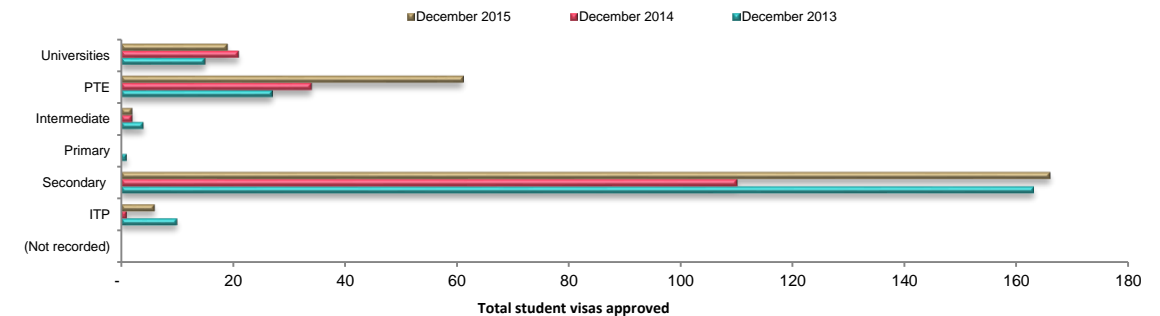
Thailand: Total student visas issued by sector, YTD



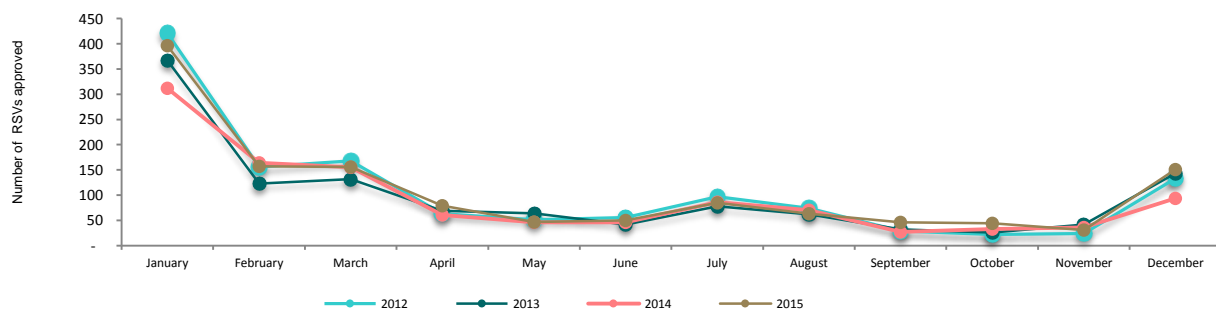
Thailand: First time student visas (FSV), 2012 - 2015



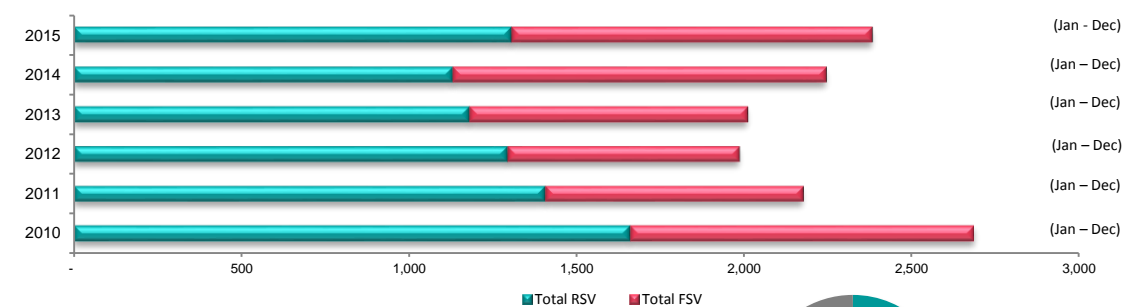
Thailand: Total student visas issued by sector, December



Thailand: Renewed student visas (RSV), 2012 - 2015



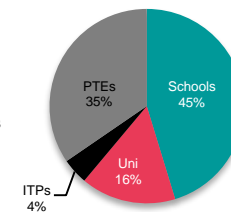
Thailand: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- 2015 results were mixed with FSVs flat, down 3% (-37) and TSVs up 6% (138).
- December results were strong with TSVs up 51% (86) and FSVs up 39% (29).
- In 2015 45% of TSVs have been in the school sectors followed by the university sector 16%.

YTD 2015 sector breakdown of TSVs



Indonesia:



December RSV
↓ -1 -7%

December FSV
↑ 13 76%

December TSV
↑ 12 38%

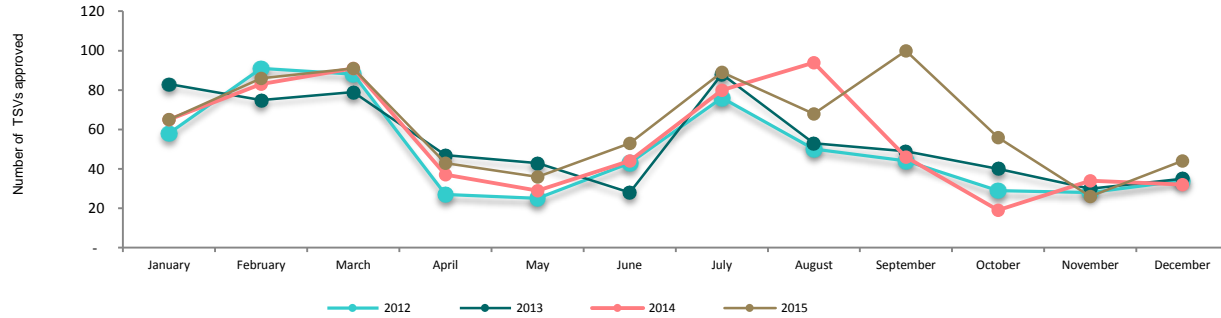
YTD RSV
↑ 51 15%

YTD FSV
↑ 52 17%

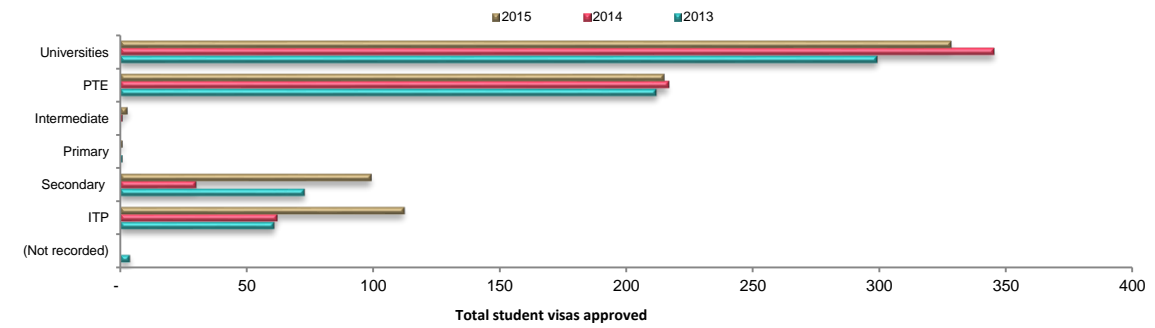
YTD TSV
↑ 103 16%

YTD (January-December)

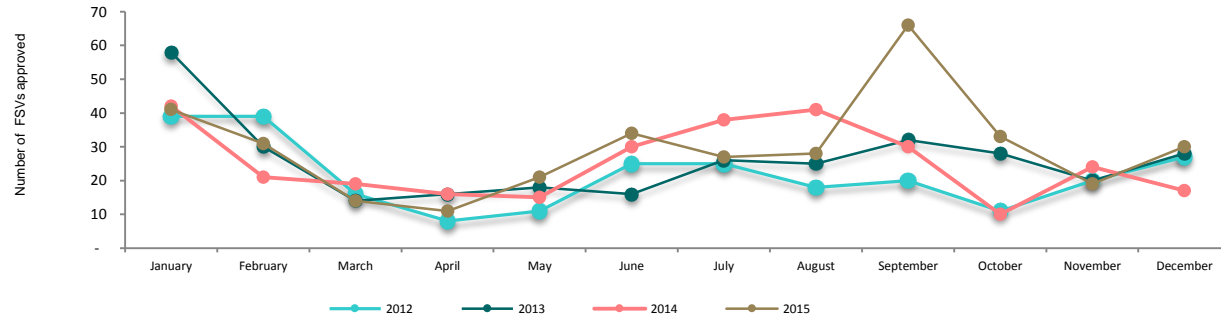
Indonesia: Total student visas (TSV), 2012 - 2015



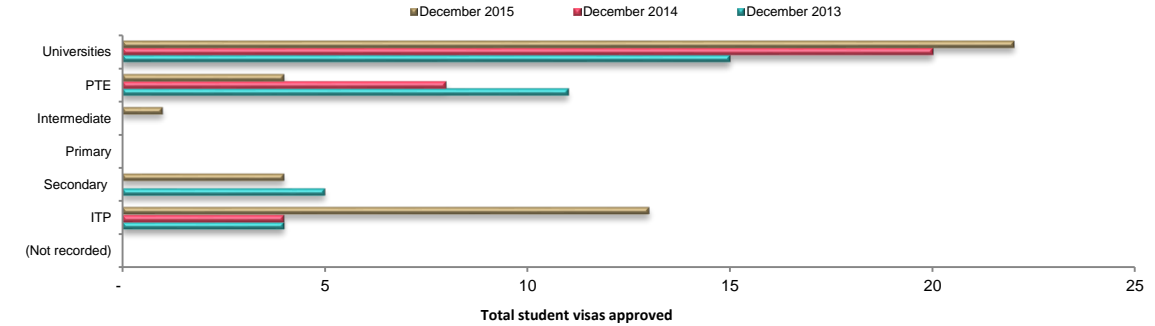
Indonesia: Total student visas issued by sector, YTD



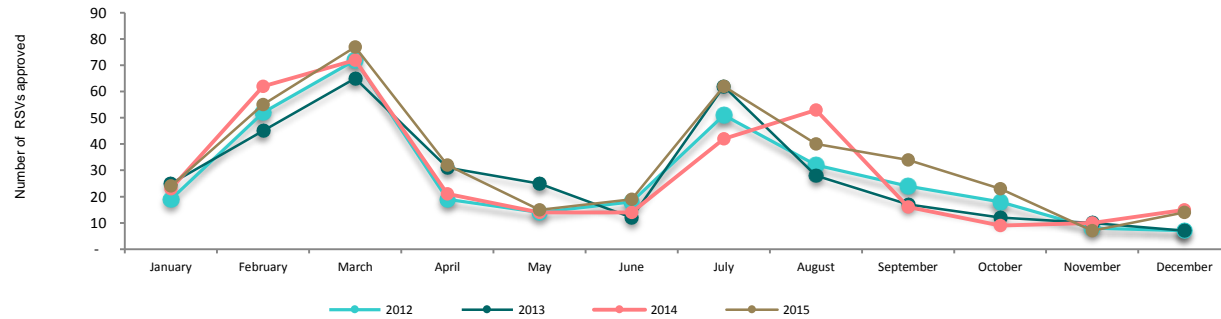
Indonesia: First time student visas (FSV), 2012 - 2015



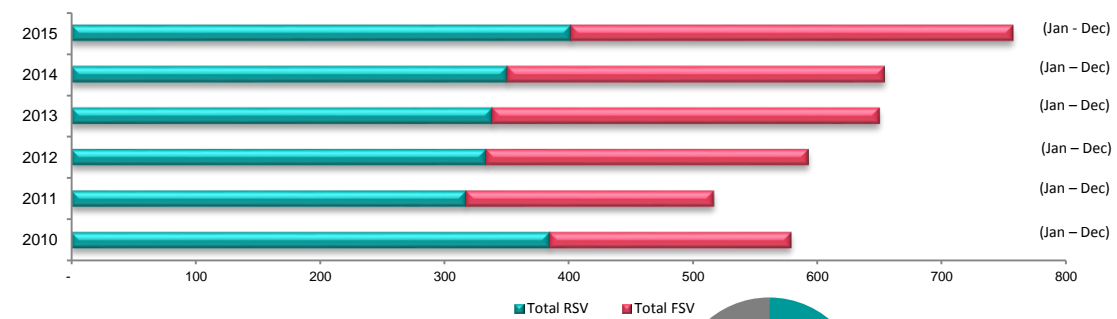
Indonesia: Total student visas issued by sector, December



Indonesia: Renewed student visas (RSV), 2012 - 2015



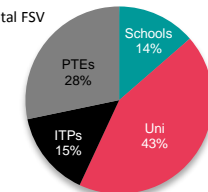
Indonesia: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- Indonesia experienced strong growth in 2015 with TSVs up 16% (103) and FSVs up 17% (52).
- December results were positive with TSVs up 38% (12) and FSVs up 76% (13).
- Secondary schools experienced strong TSVs growth in 2015 up 230% (69).

YTD 2015 sector breakdown of TSVs

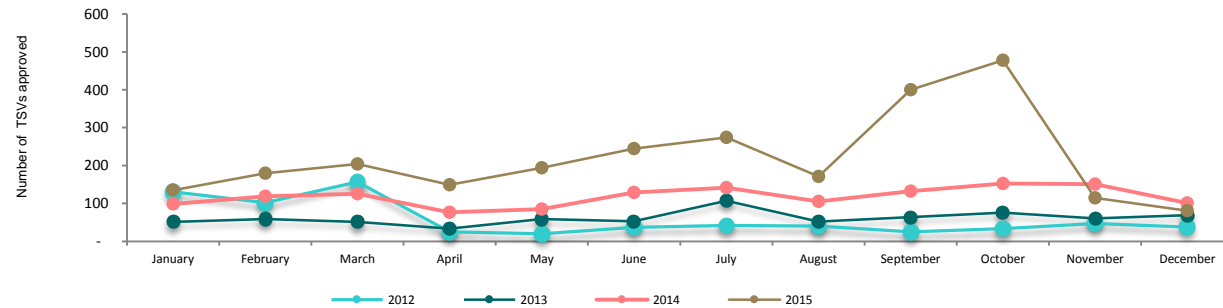


Philippines:

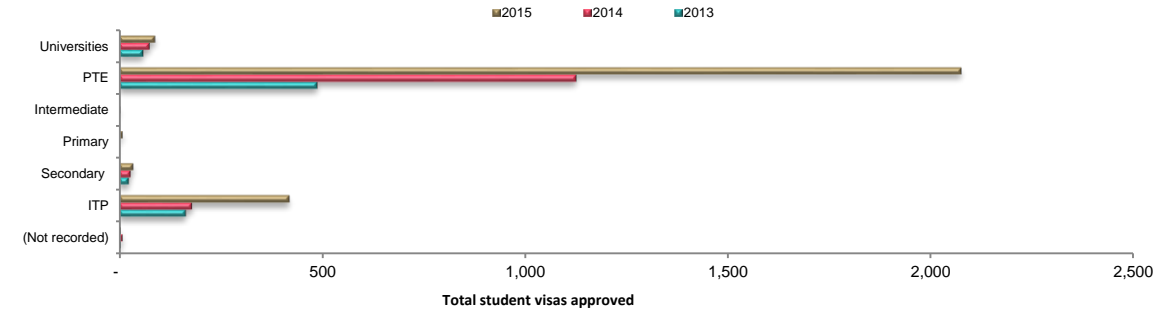
December RSV ↓ -3 -27% December FSV ↓ -17 -19% December TSV ↓ -20 -20%

YTD RSV ↑ 14 6% YTD FSV ↑ 1,193 101% YTD TSV ↑ 1,207 85%

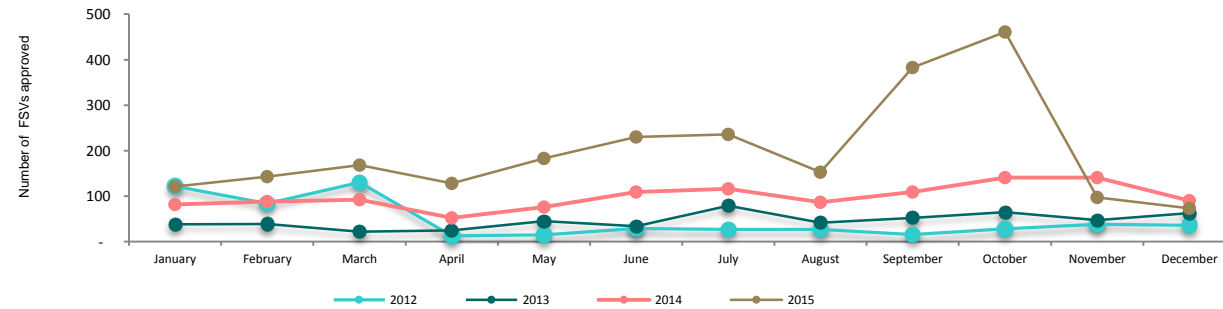
Philippines: Total student visas (TSV), 2012 - 2015



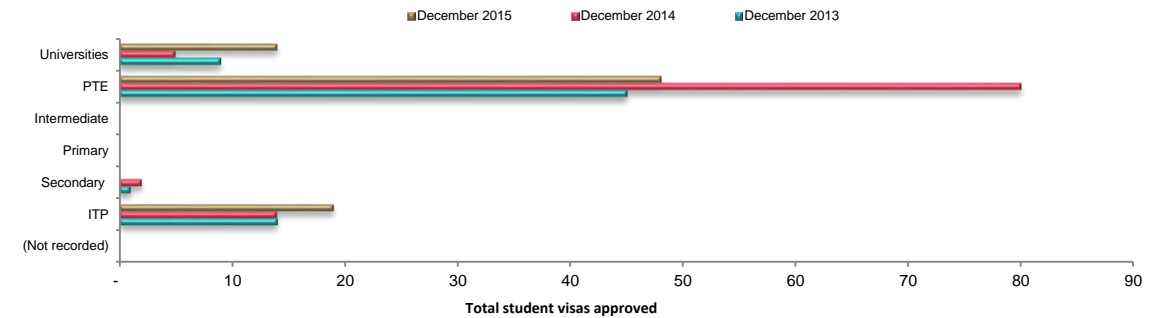
Philippines: Total student visas issued by sector, YTD



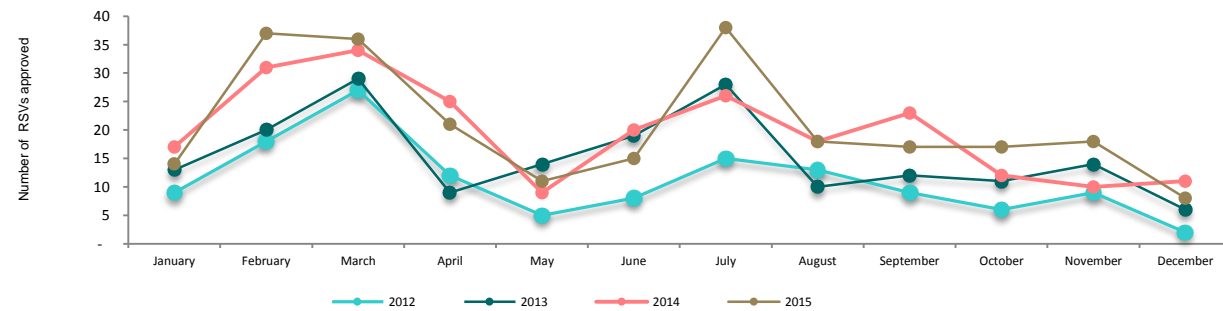
Philippines: First time student visas (FSV), 2012 - 2015



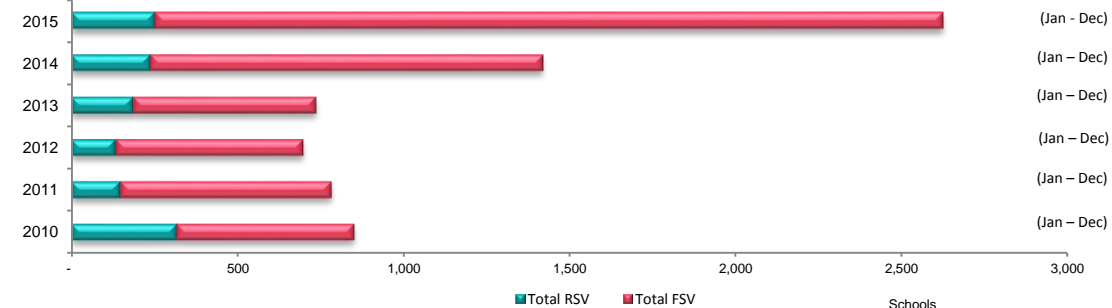
Philippines: Total student visas issued by sector, December



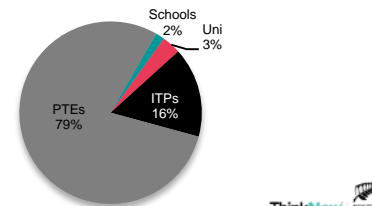
Philippines: Renewed student visas (RSV), 2012 - 2015



Philippines: Cumulative total for RSV vs. FSV, 2010 - 2015

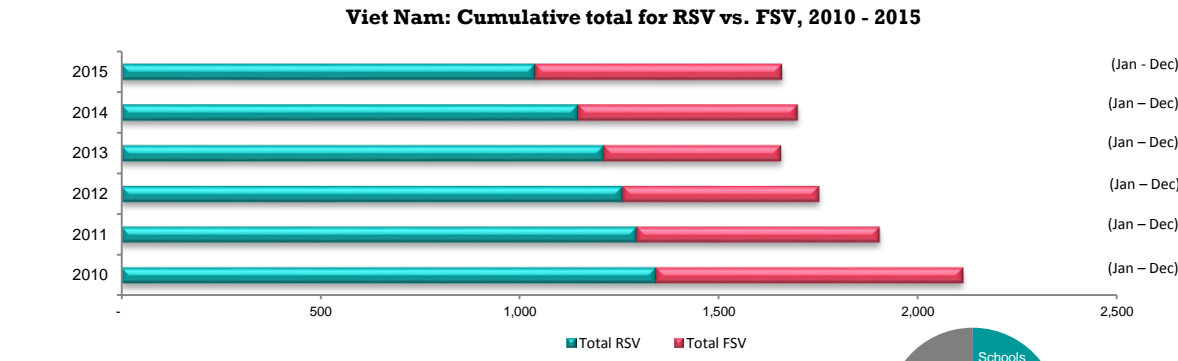
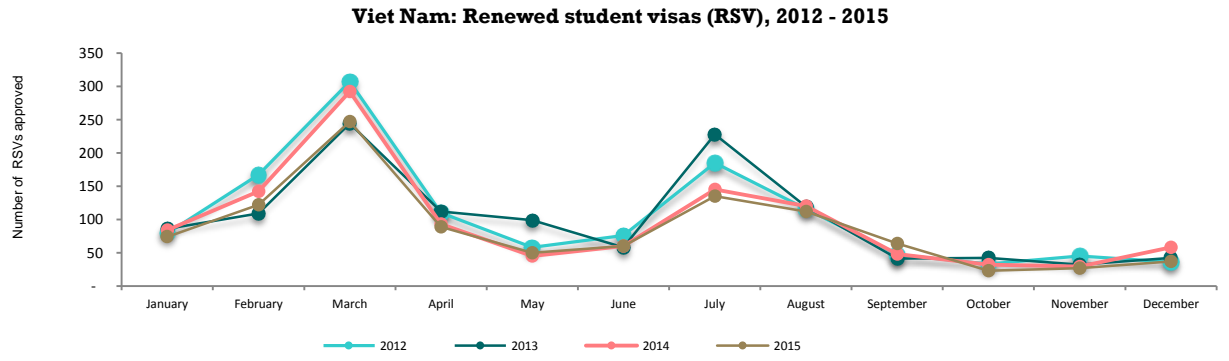
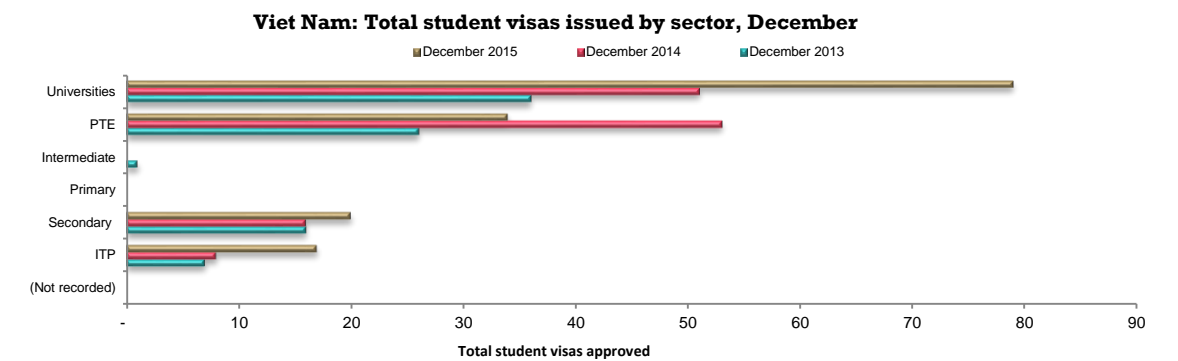
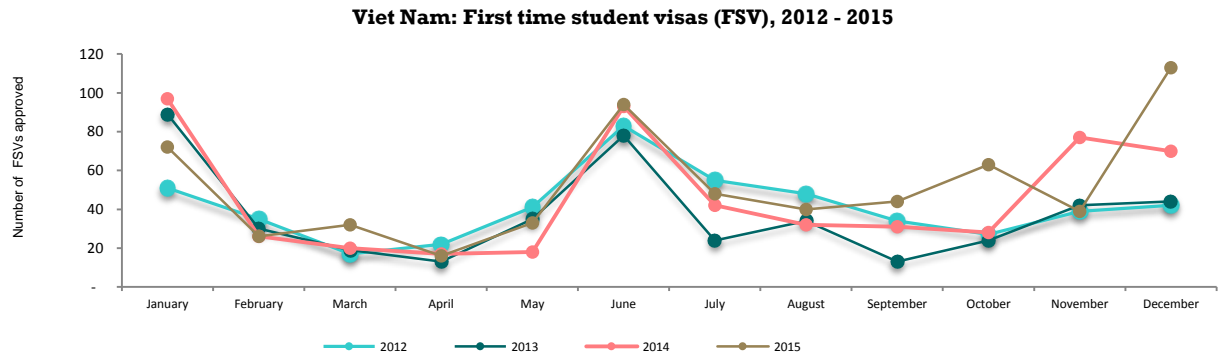
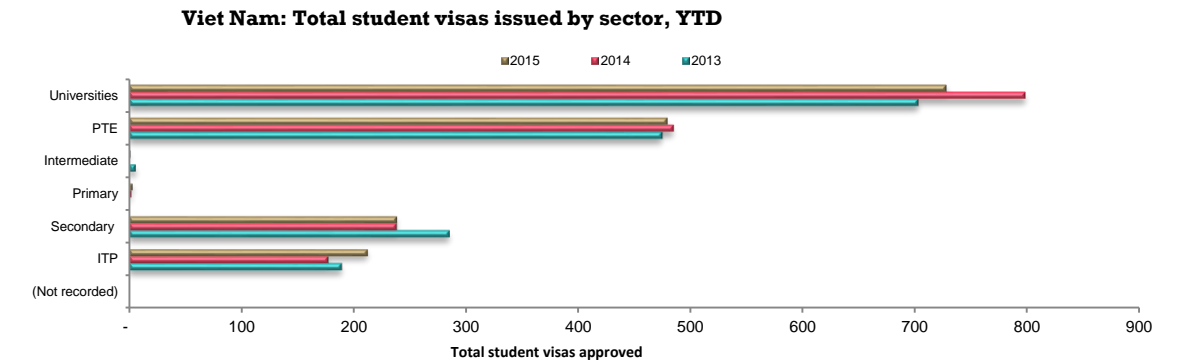
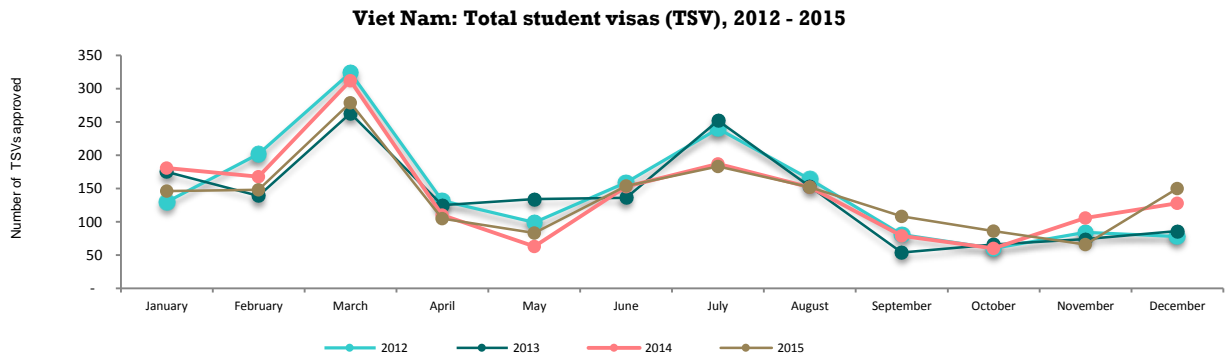


YTD 2015 sector breakdown of TSVs



Takeaways:

- The Philippines was one of NZ's fastest growing markets in 2015, both in absolute and percentage terms. For the year, TSVs increased by 85% (1,207), and FSVs were up 110% (1,193).
- December results were negative with TSVs down 20% (-20) and FSVs 19% (-17).
- The PTE sector made up 79% of TSVs approved in 2015.



Takeaways:

- 2015 Viet Nam student visas results were mixed with TSVs flat, down 2% (-39) and FSVs up 13% (69).
- December results were positive, with TSVs growing by 17% (22) and FSVs up 61% (43).
- The university sector accounted for 44% of TSVs in 2015 followed by the PTE sector 29%.



Malaysia:

December RSV
↑ 17 142%

December FSV
↓ -22 -31%

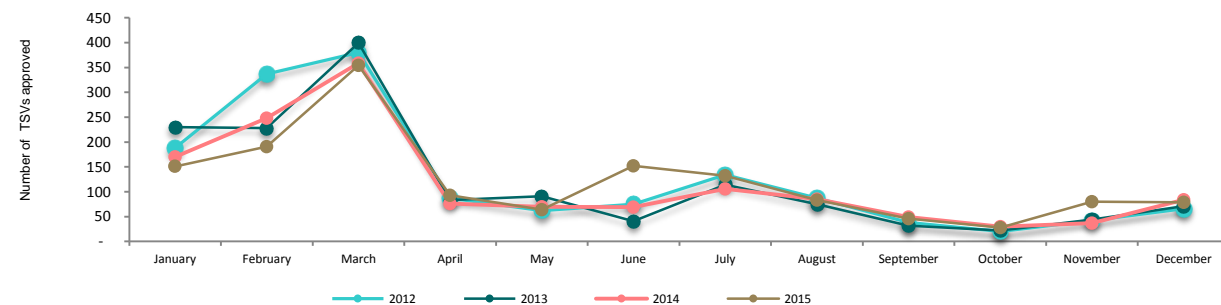
December TSV
↓ -5 -6%

YTD RSV
↓ -77 -8%

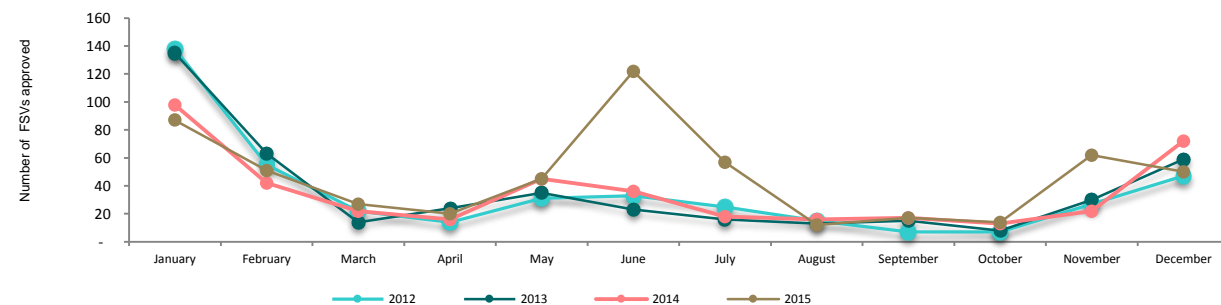
YTD FSV
↑ 147 35%

YTD TSV
↑ 70 5%

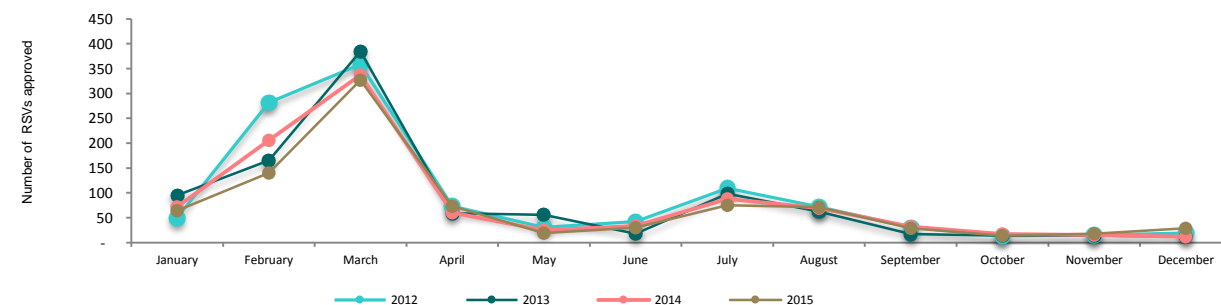
Malaysia: Total student visas (TSV), 2012 - 2015



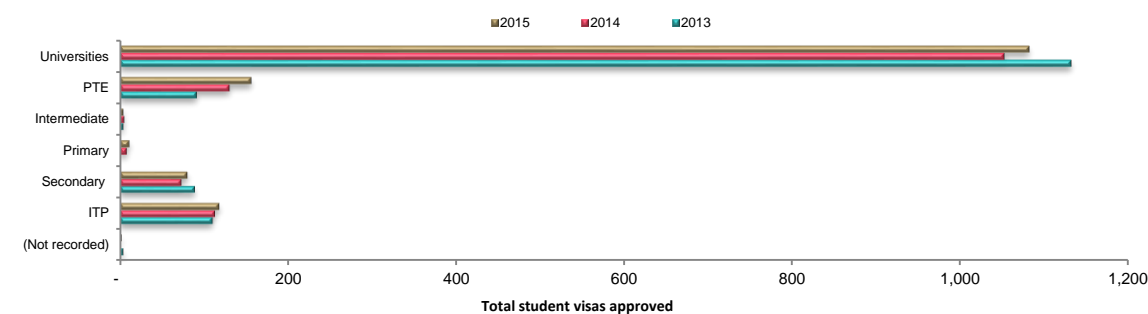
Malaysia: First time student visas (FSV), 2012 - 2015



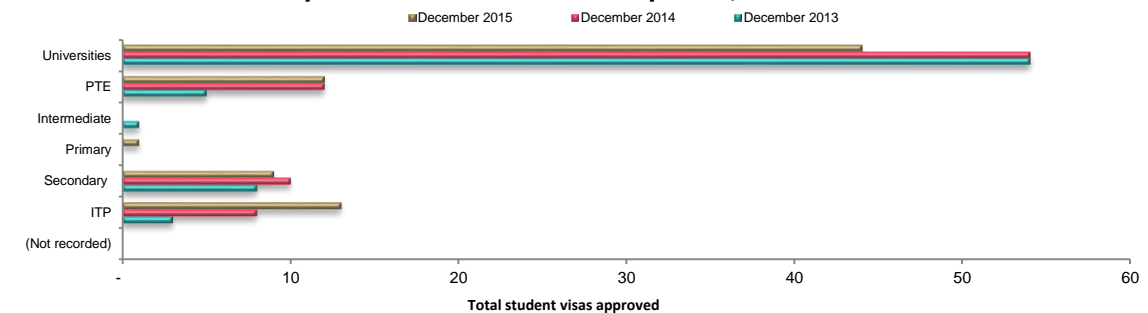
Malaysia: Renewed student visas (RSV), 2012 - 2015



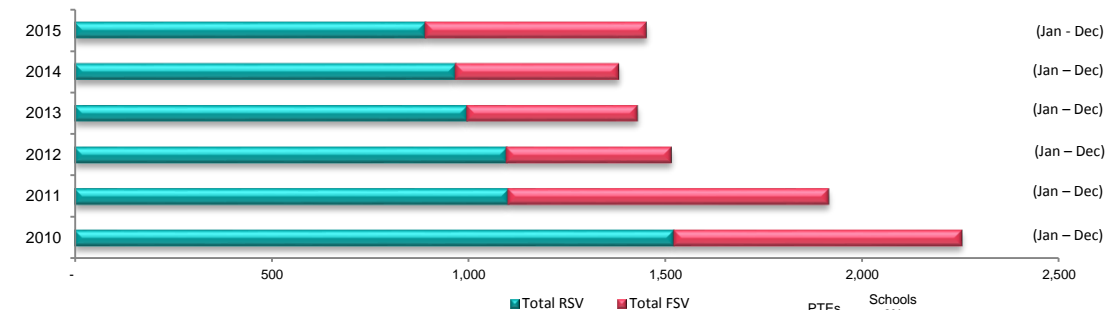
Malaysia: Total student visas issued by sector, YTD



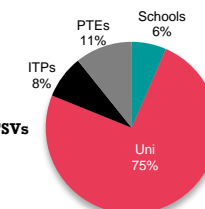
Malaysia: Total student visas issued by sector, December



Malaysia: Cumulative total for RSV vs. FSV, 2010 - 2015



YTD 2015 sector breakdown of TSVs



Takeaways:

- Malaysian 2015 results were positive with TSVs up 5% (70) and FSVs, up 35% (147).
- December results are negative with TSV down 6% (-5) and FSVs down 31% (-22).
- The university sector made up 75% of TSVs in 2015.

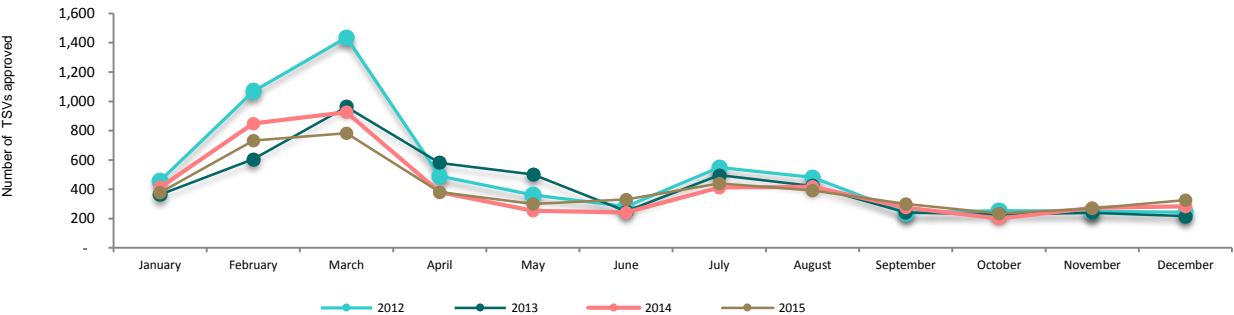
Korea:

December RSV	December FSV	December TSV
➡ 2 2%	⬆ 42 24%	⬆ 44 16%

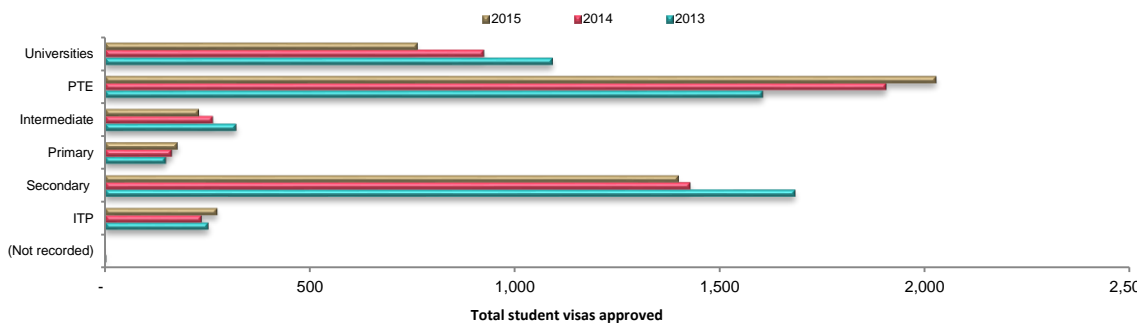
YTD RSV	YTD FSV	YTD TSV
➡ -84 -3%	➡ 25 1%	➡ -59 -1%

YTD (January-December)

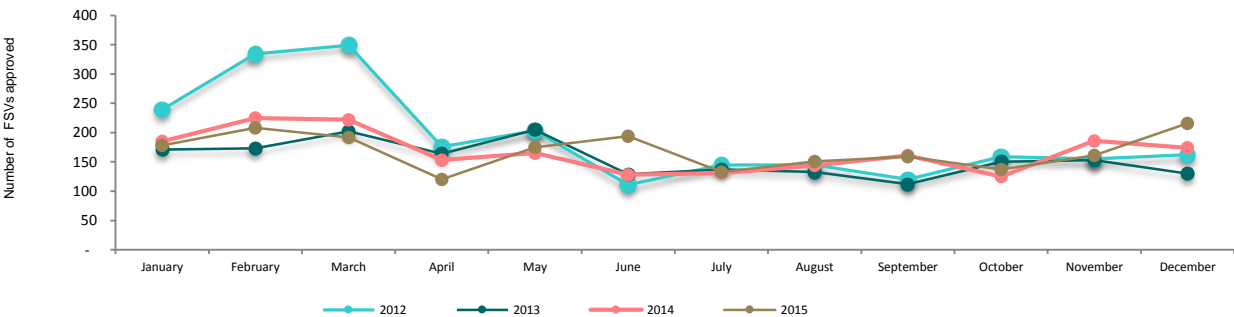
Korea: Total student visas (TSV), 2012 - 2015



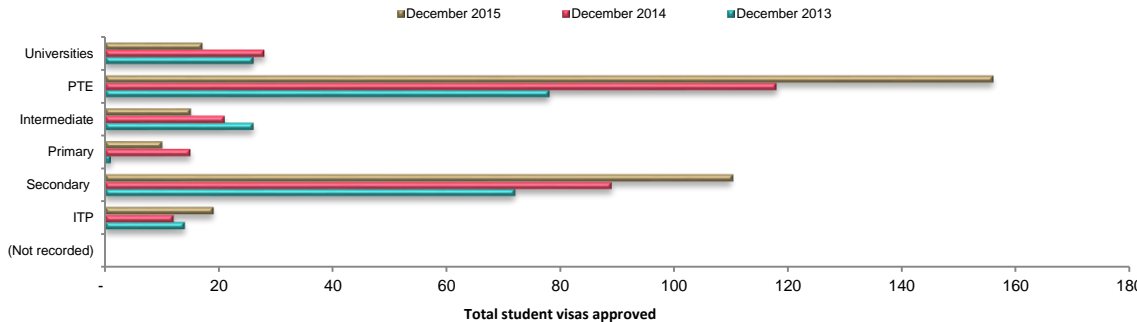
Korea: Total student visas issued by sector, YTD



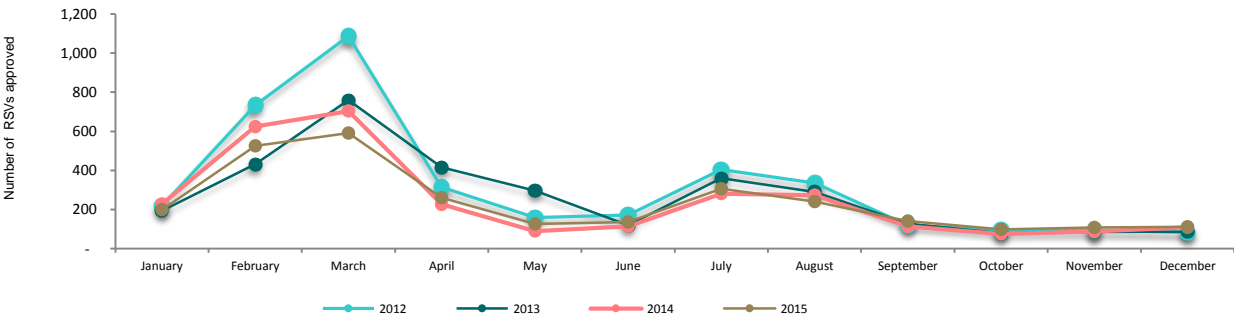
Korea: First time student visas (FSV), 2012 - 2015



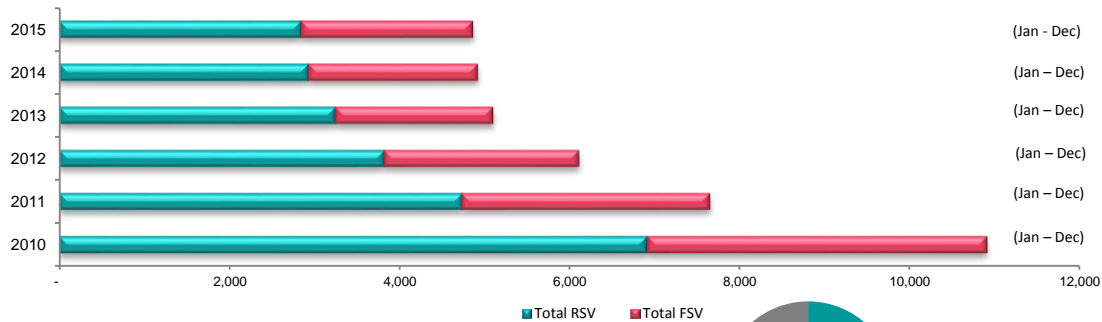
Korea: Total student visas issued by sector, December



Korea: Renewed student visas (RSV), 2012 - 2015



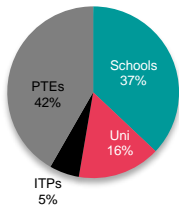
Korea: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- Student visas results for Korea were flat for 2015, TSVs were down 1% (-59) and FSVs up 1% (25).
- December results were positive TSVs up 16% (44) and FSVs up 24% (42).
- The PTE sector experienced the largest growth in 2015 up 6% (122).

YTD 2015 sector breakdown of TSVs



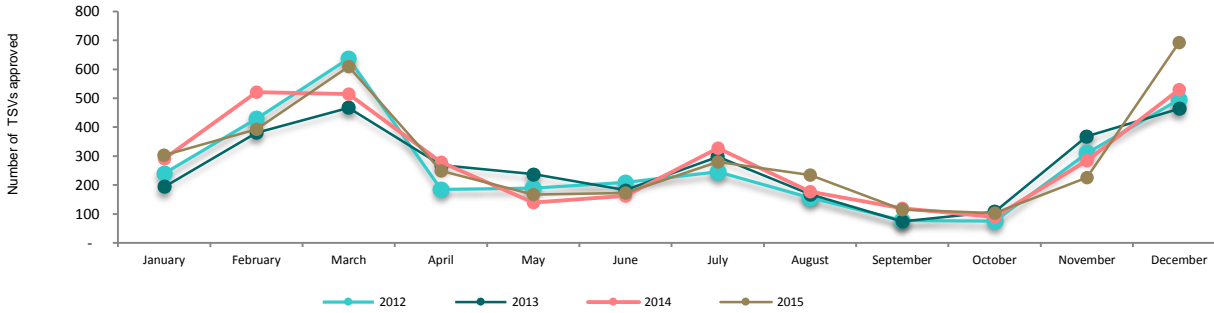
Japan:

YTD (January-December)

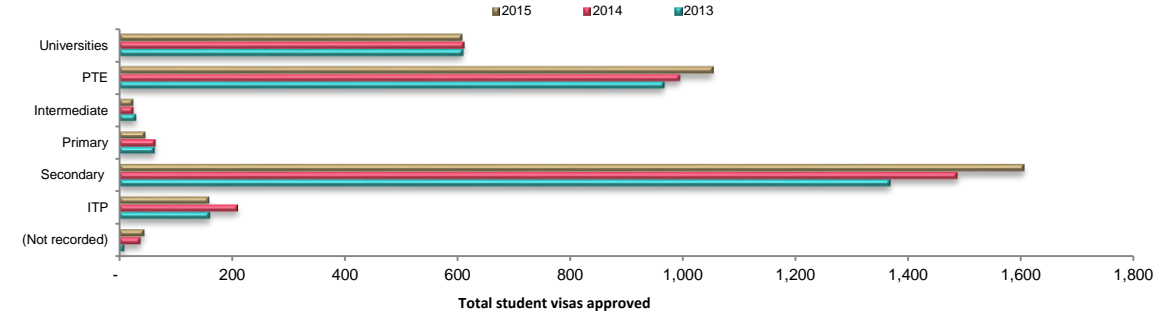
December RSV	December FSV	December TSV
↑ 30 25%	↑ 132 32%	↑ 162 31%

YTD RSV	YTD FSV	YTD TSV
→ -18 -1%	↑ 129 6%	→ 111 3%

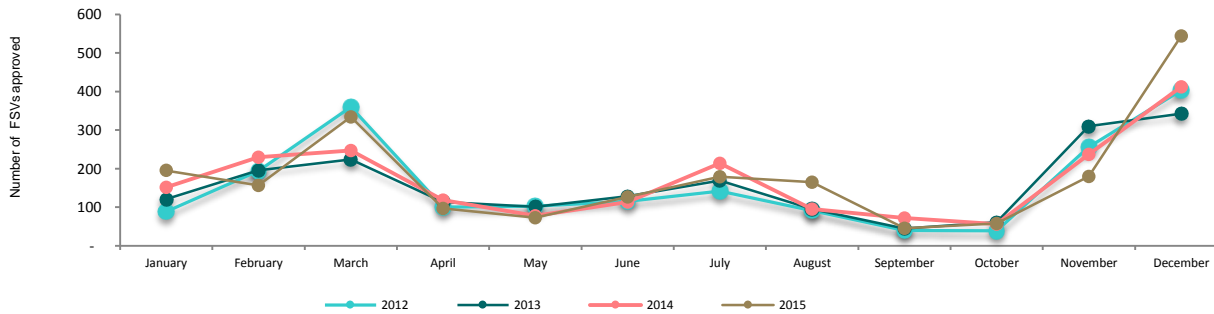
Japan: Total student visas (TSV), 2012 - 2015



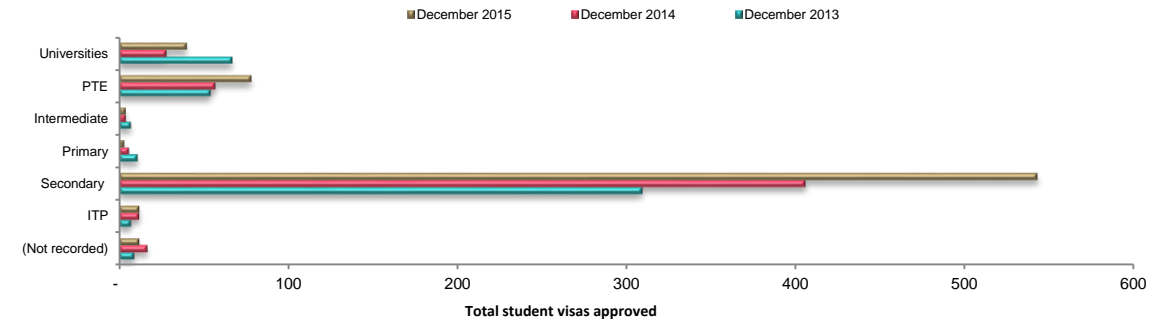
Japan: Total student visas issued by sector, YTD



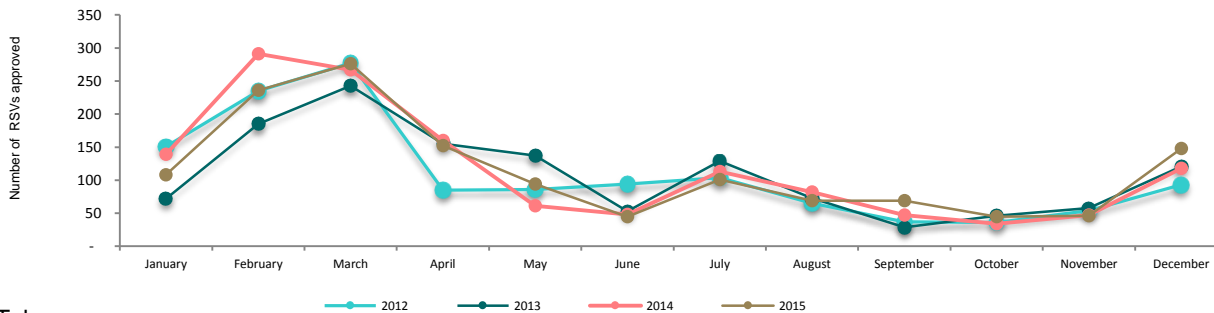
Japan: First time student visas (FSV), 2012 - 2015



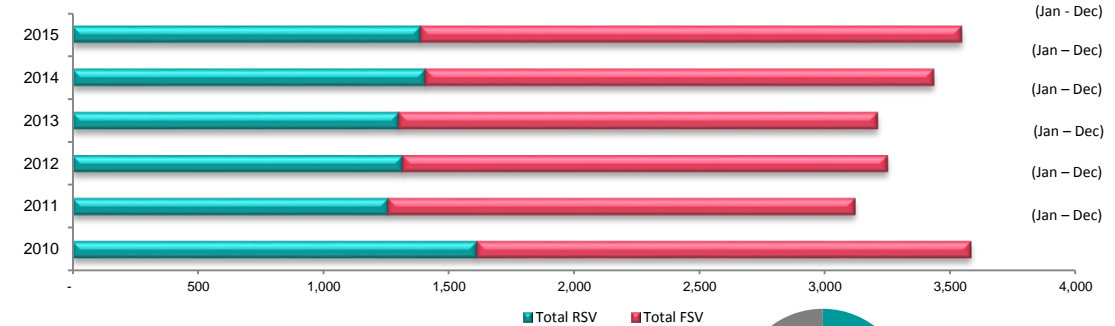
Japan: Total student visas issued by sector, December



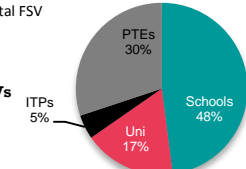
Japan: Renewed student visas (RSV), 2012 - 2015



Japan: Cumulative total for RSV vs. FSV, 2010 - 2015



YTD 2015 sector breakdown of TSVs



Takeaways:

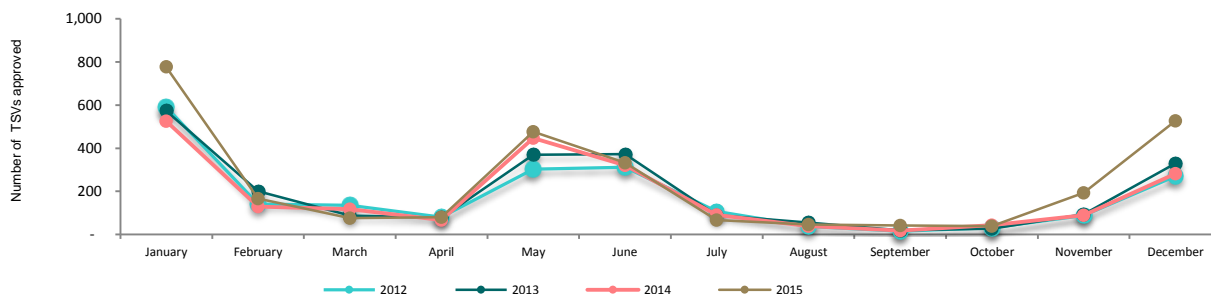
- Japan 2015 results were mixed with TSVs flat, up 3% (111) and FSV up 6% (129).
- December results were strong with TSVs up 31% (162) and FSVs up 32% (132). The growth in December was driven by the secondary school sector, up 34% (137).

United States of America:

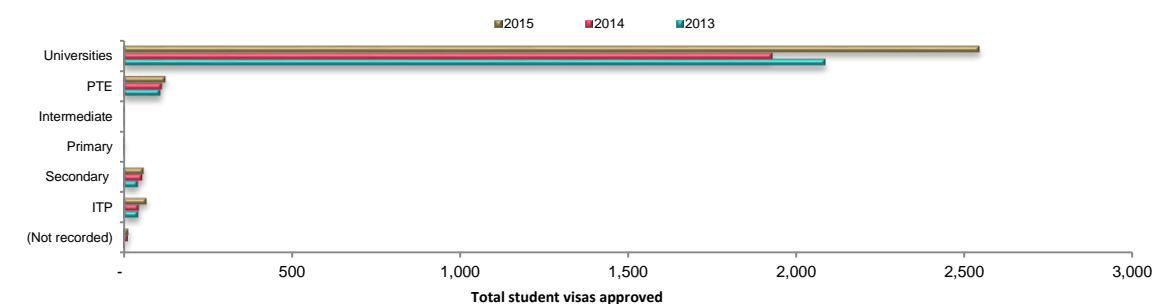
December RSV	December FSV	December TSV
↑ 3 33%	↑ 241 88%	↑ 244 87%

YTD RSV	YTD FSV	YTD TSV
↓ -19 -6%	↑ 675 37%	↑ 656 30%

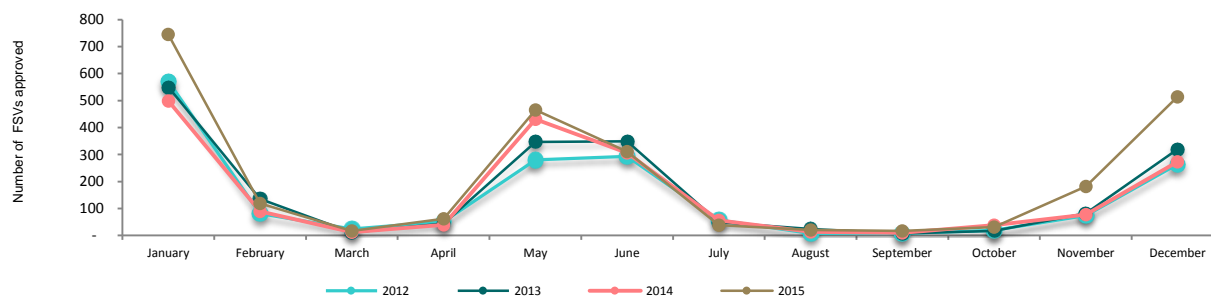
USA: Total student visas (TSV), 2012 - 2015



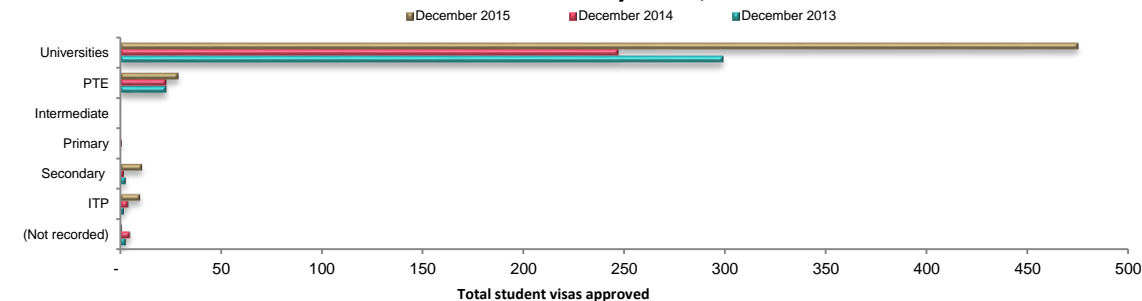
USA: Total student visas issued by sector, YTD



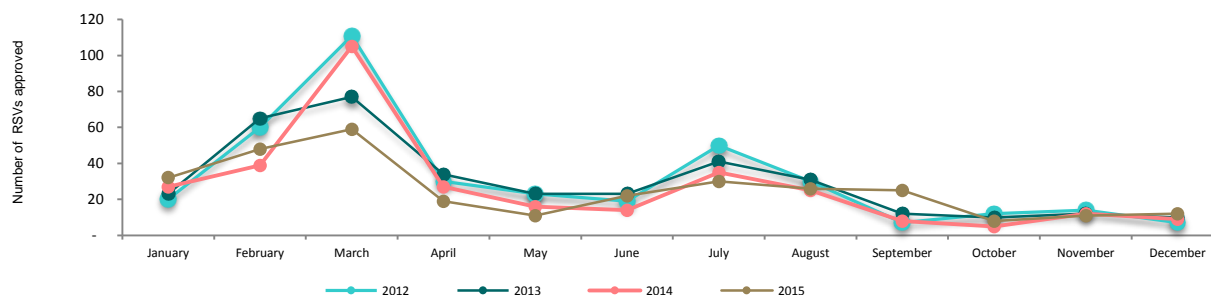
USA: First time student visas (FSV), 2012 - 2015



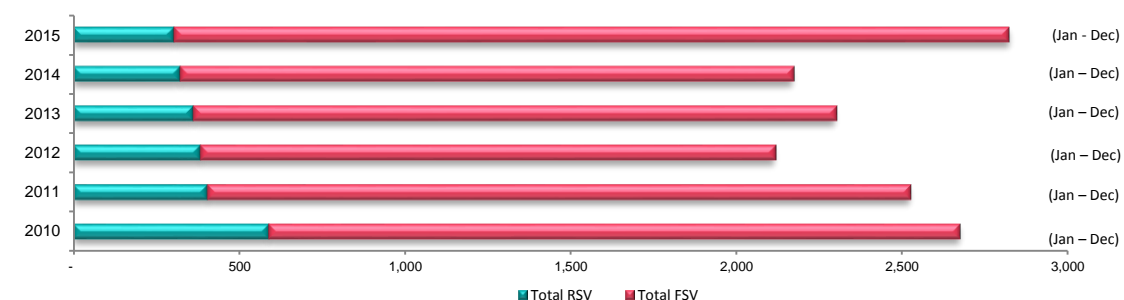
USA: Total student visas issued by sector, December



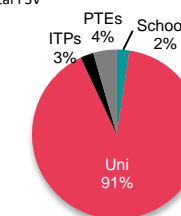
USA: Renewed student visas (RSV), 2012 - 2015



USA: Cumulative total for RSV vs. FSV, 2010 - 2015



YTD 2015 sector breakdown of TSVs



Takeaways:

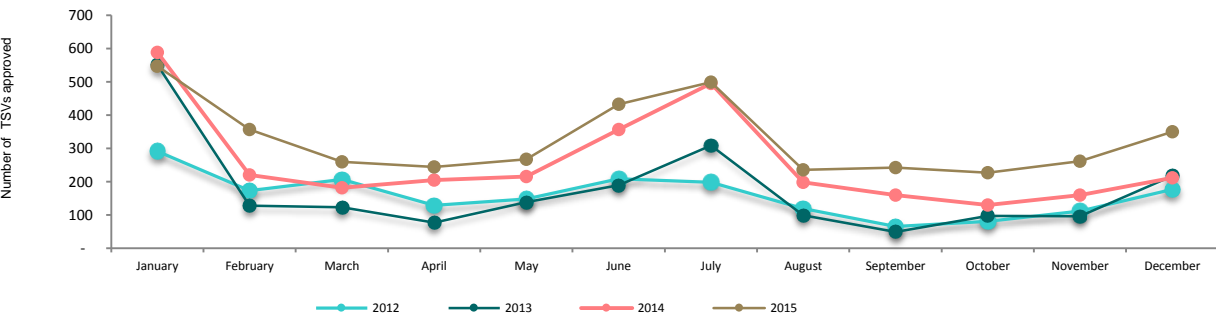
- The USA has shown strong growth this year, with record level growth in TSVs up 30% (656) and FSVs up 37% (675).
- December was a strong month, with TSV up 87% (244) and FSVs up 88% (241).
- The growth in TSV in December was driven by the university sector, up 92% (228).

Latin America:

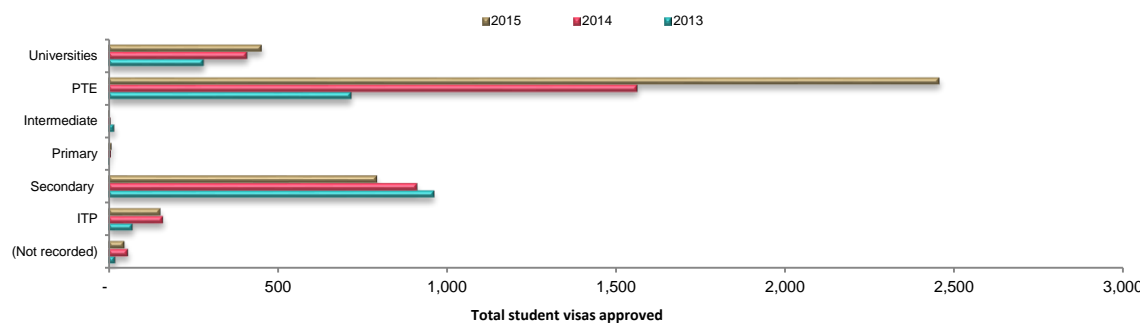
December RSV	December FSV	December TSV
➡ 1 2%	⬆ 137 82%	⬆ 138 65%

YTD RSV	YTD FSV	YTD TSV
⬆ 206 38%	⬆ 594 23%	⬆ 800 26%

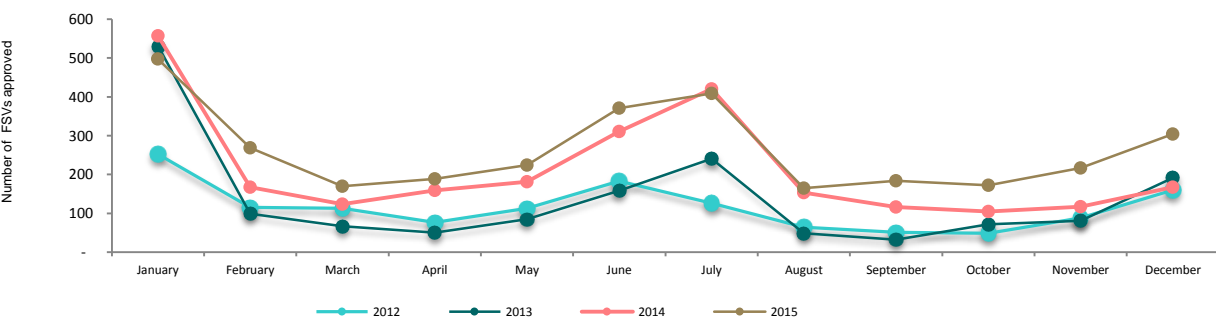
Latin America: Total student visas (TSV), 2012 - 2015



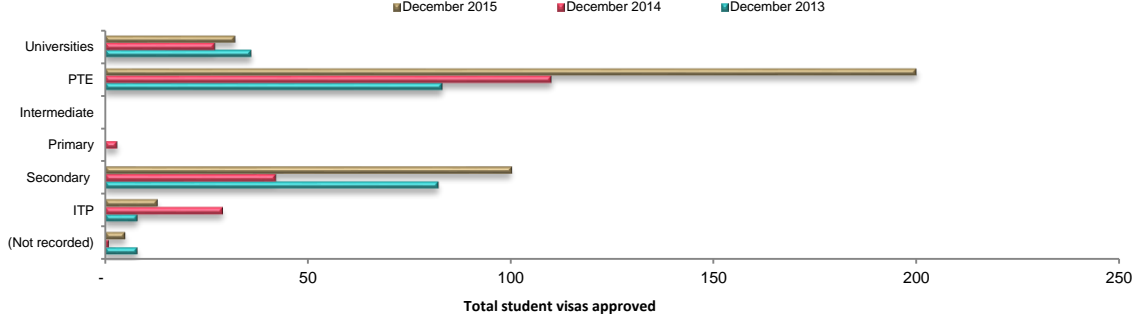
Latin America: Total student visas issued by sector, YTD



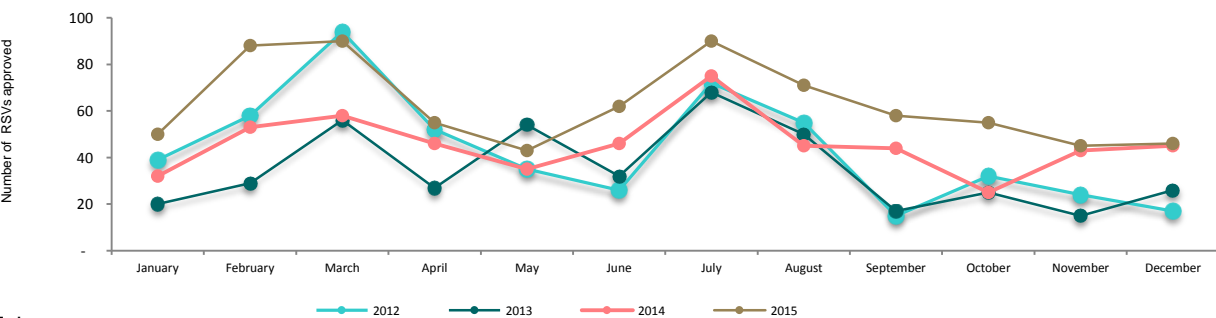
Latin America: First time student visas (FSV), 2012 - 2015



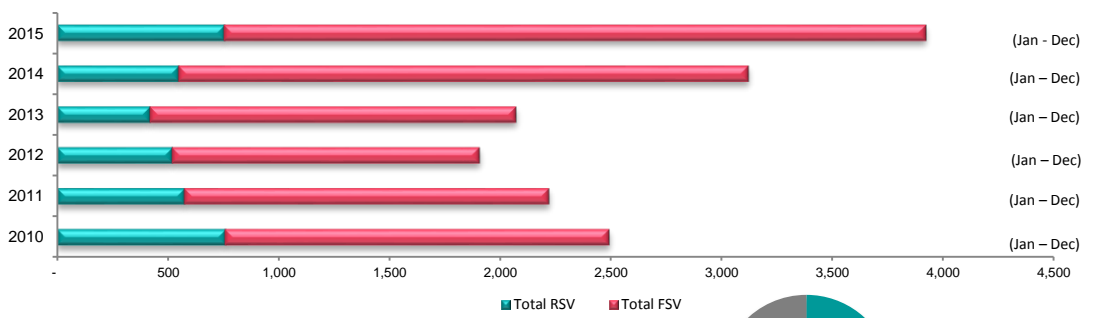
Latin America: Total student visas issued by sector, December



Latin America: Renewed student visas (RSV), 2012 - 2015

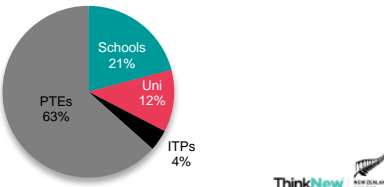


Latin America: Cumulative total for RSV vs. FSV, 2010 - 2015



- Takeaways:
- Latin America has showed strong growth in 2015, with FSVs up 23% (594) and TSVs 26% (800).
 - December was a strong month, with FSVs up 82% (137) and TSV up 65% (138).
 - The majority FSVs growth has been concentrated within the PTE sector, up 57% (732).

YTD 2015 sector breakdown of TSVs

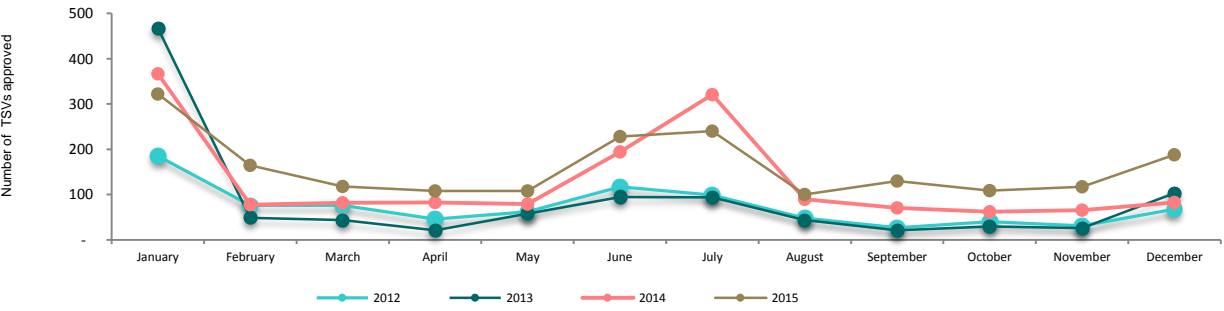


Brazil:

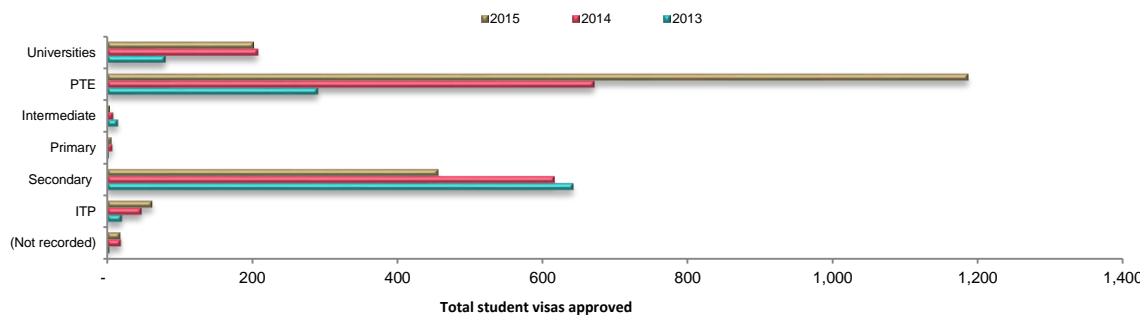
December RSV	December FSV	December TSV
↑ 5 38%	↑ 100 143%	↑ 105 127%

YTD RSV	YTD FSV	YTD TSV
↑ 95 43%	↑ 262 19%	↑ 357 23%

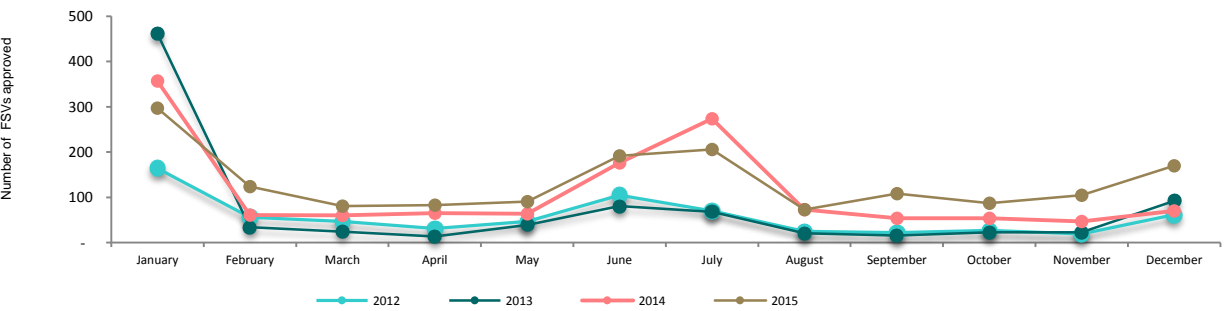
Brazil: Total student visas (TSV), 2012 - 2015



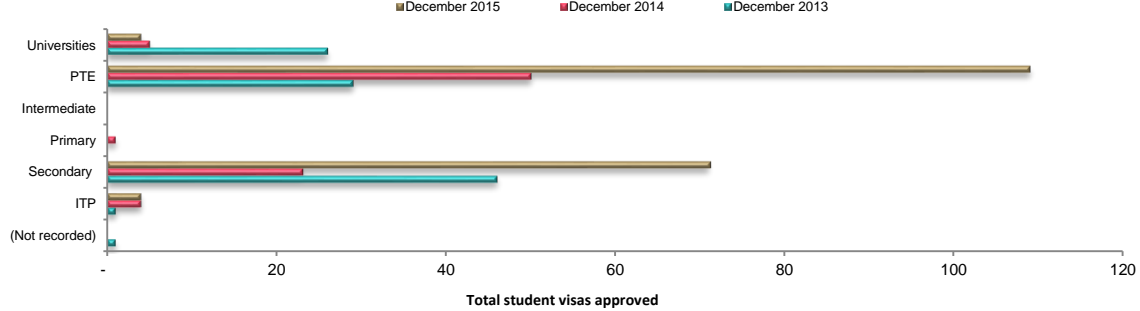
Brazil: Total student visas issued by sector, YTD



Brazil: First time student visas (FSV), 2012 - 2015



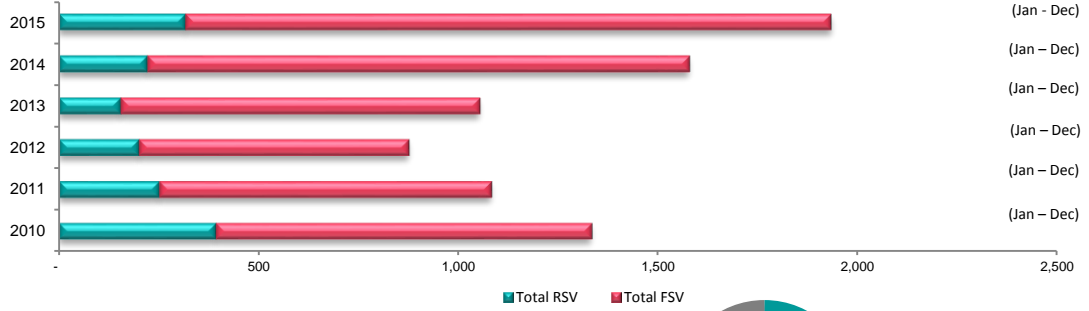
Brazil: Total student visas issued by sector, December



Brazil: Renewed student visas (RSV), 2012 - 2015



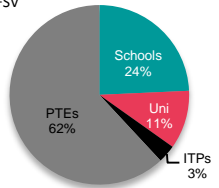
Brazil: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- Brazil experienced strong growth in 2015, with TSVs up 23% (357) and FSVs up 19% (262).
- 2015 was a strong year for the PTE sector, up 77% (515) in TSVs. In contrast, the secondary school sector was down 26% (-161) YTD. This is driven by a reduction in the number of Pernambuco students arriving in July 2015, compared to July 2014.

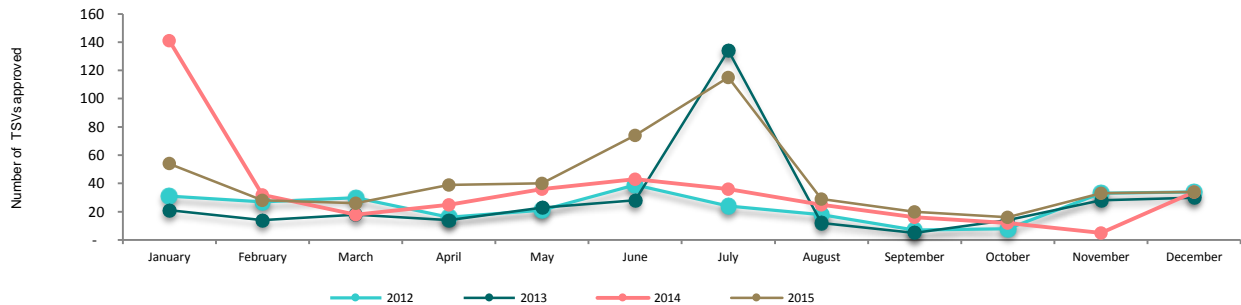
YTD 2015 sector breakdown of TSVs



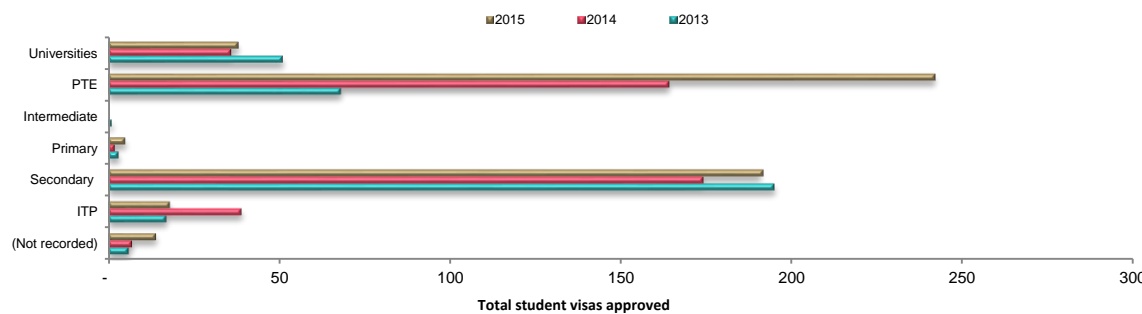
Chile:



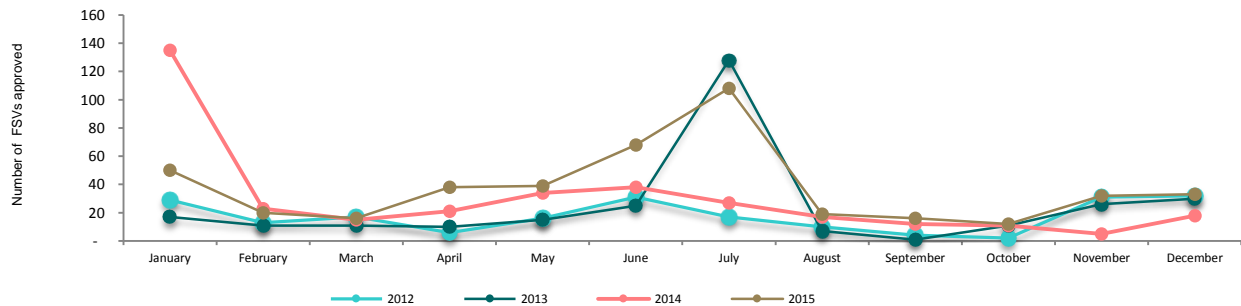
Chile: Total student visas (TSV), 2012 - 2015



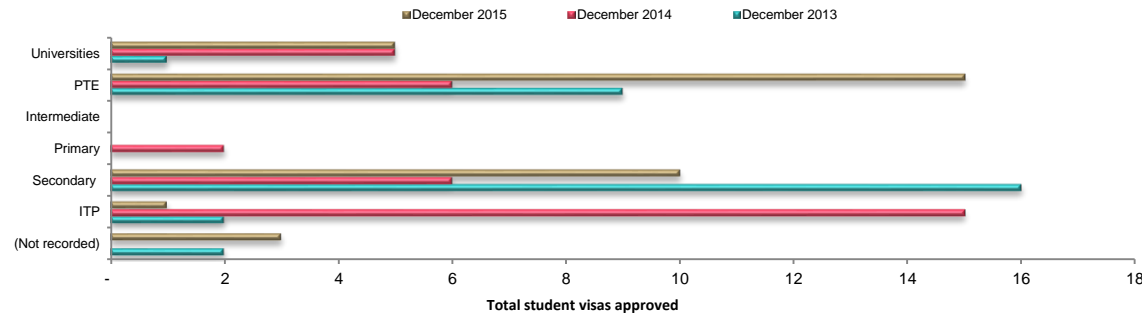
Chile: Total student visas issued by sector, YTD



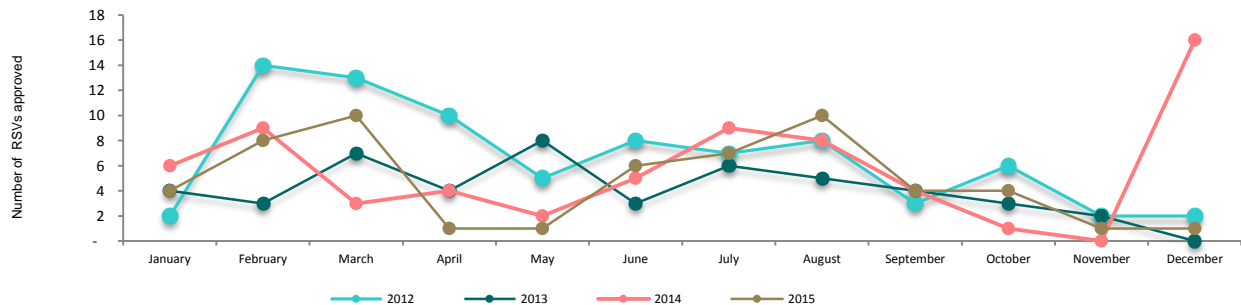
Chile: First time student visas (FSV), 2012 - 2015



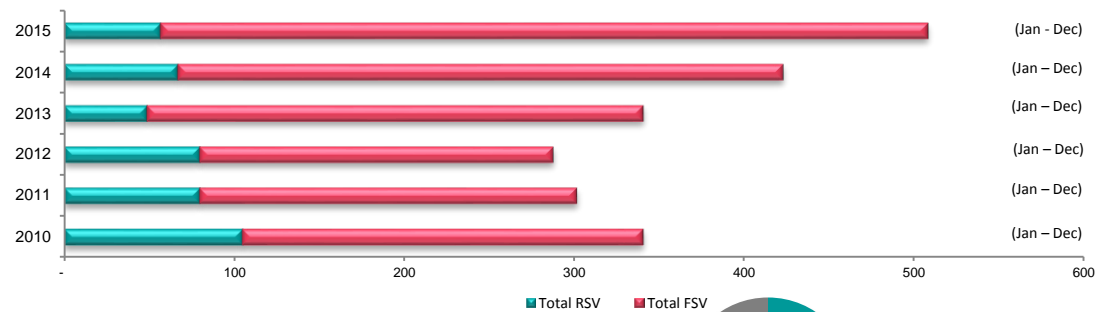
Chile: Total student visas issued by sector, December



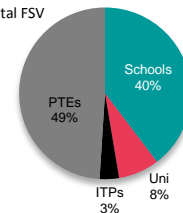
Chile: Renewed student visas (RSV), 2012 - 2015



Chile: Cumulative total for RSV vs. FSV, 2010 - 2015



YTD 2015 sector breakdown of TSVs



Takeaways:

- 2015 was a strong year for Chile, TSVs were up 20% (85), driven by a 27% (95) increase in FSVs.
- December results were mixed with TSVs flat 0% (0) and FSVs up 83% (15).
- The PTE sector has experienced strong growth in 2015 TSVs, up 48% (78).

Colombia:

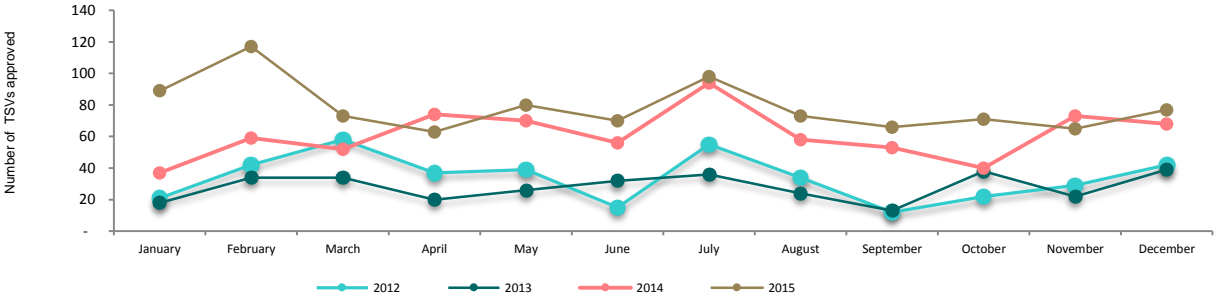


December RSV	December FSV	December TSV
4	5	9
33%	9%	13%

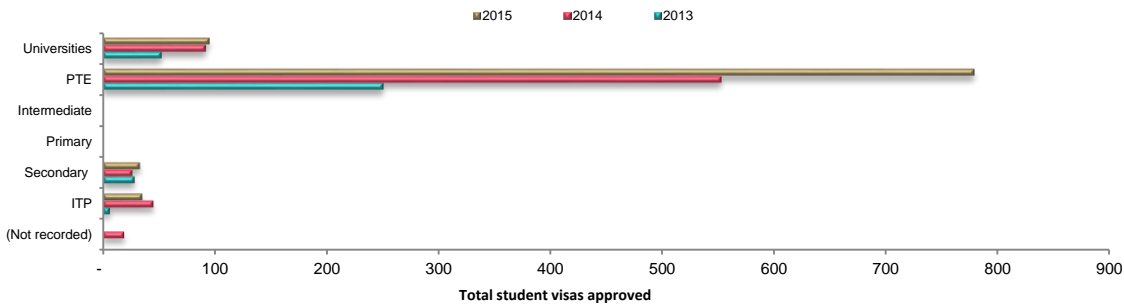
YTD RSV	YTD FSV	YTD TSV
93	115	208
68%	19%	28%

YTD (January-December)

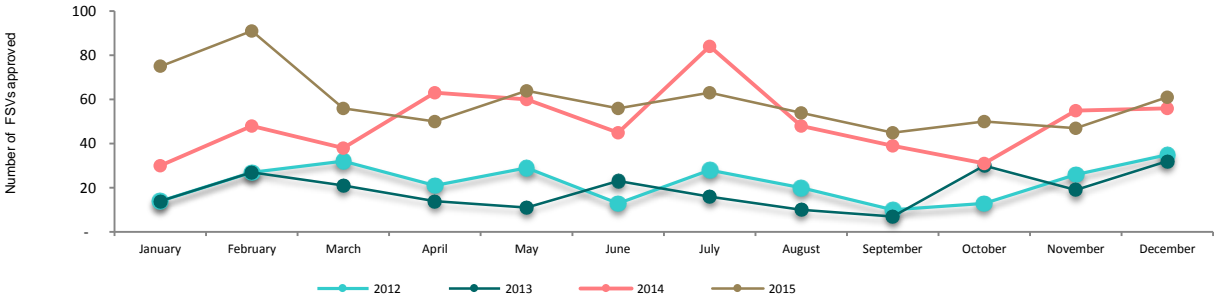
Colombia: Total student visas (TSV), 2012 - 2015



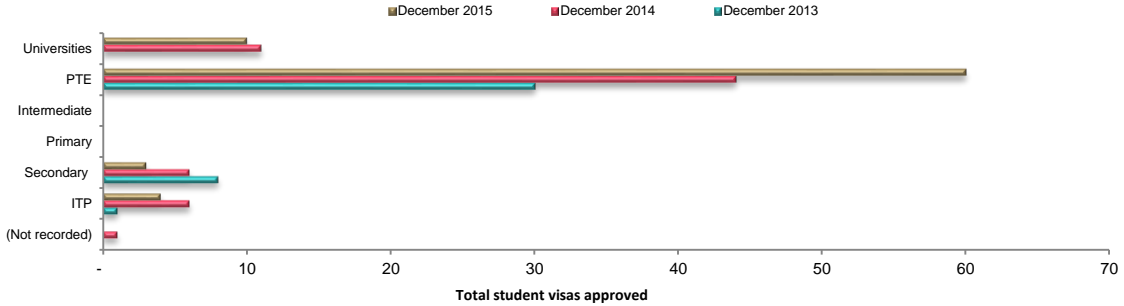
Colombia: Total student visas issued by sector, YTD



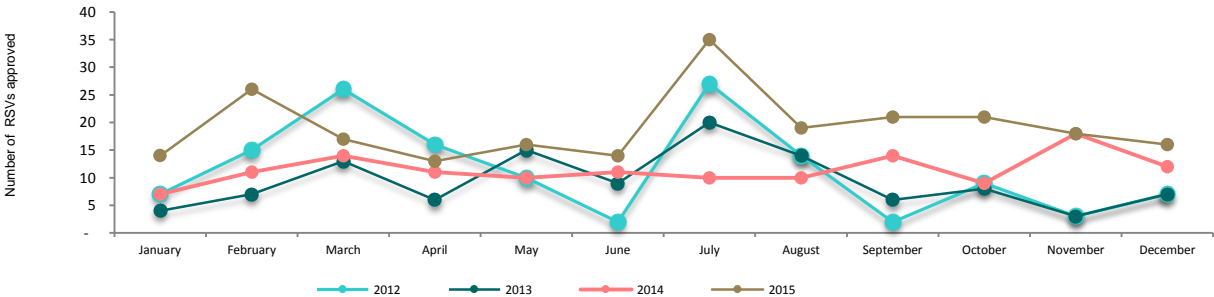
Colombia: First time student visas (FSV), 2012 - 2015



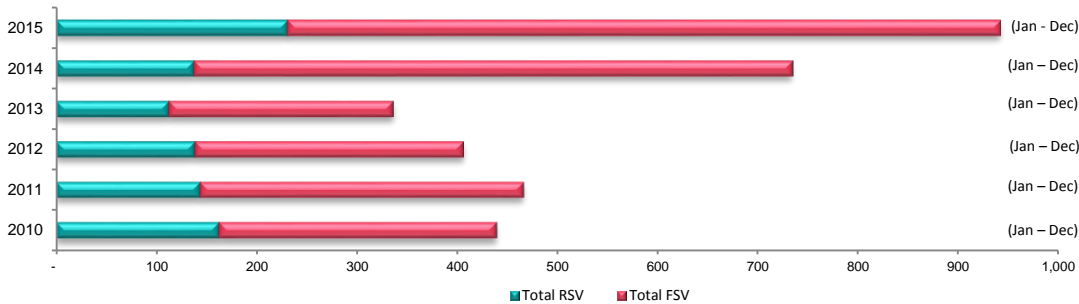
Colombia: Total student visas issued by sector, December



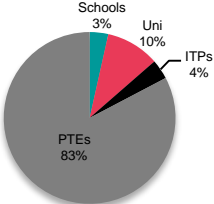
Colombia: Renewed student visas (RSV), 2012 - 2015



Colombia: Cumulative total for RSV vs. FSV, 2010 - 2015



YTD 2015 sector breakdown of TSVs



- Takeaways:
- Colombia results for 2015 were strong with TSVs up 28% (208) and FSVs up 19% (115).
 - December results were strong FSVs up 9% (5) and TSVs up 13% (9).
 - The PTE sector made up 83% of TSVs in 2015.

Middle East:

December RSV

↓ -23 -29%

December FSV

↓ -13 -25%

December TSV

↓ -36 -27%

YTD RSV

↓ -290 -12%

YTD FSV

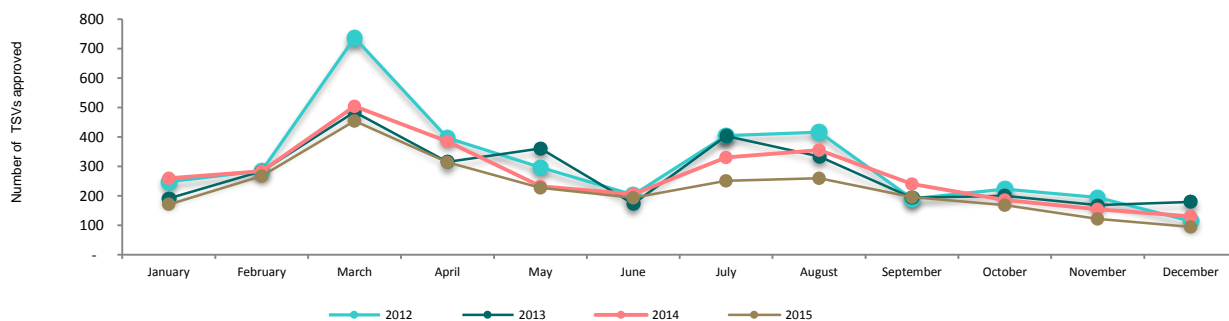
↓ -260 -32%

YTD TSV

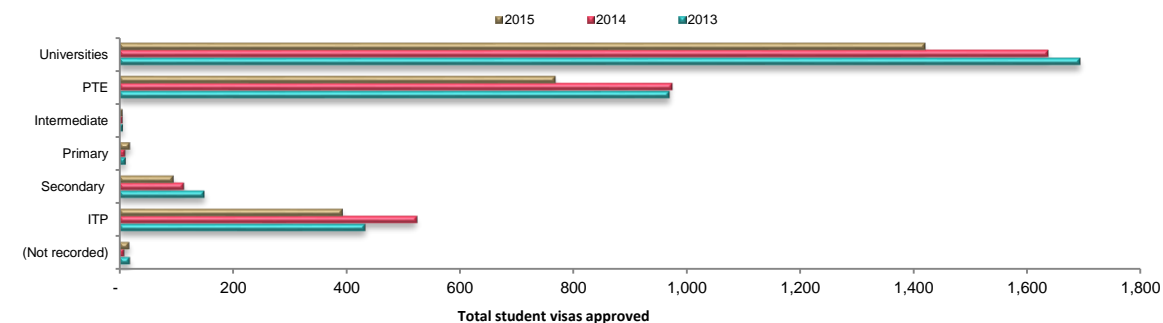
↓ -550 -17%

YTD (January-December)

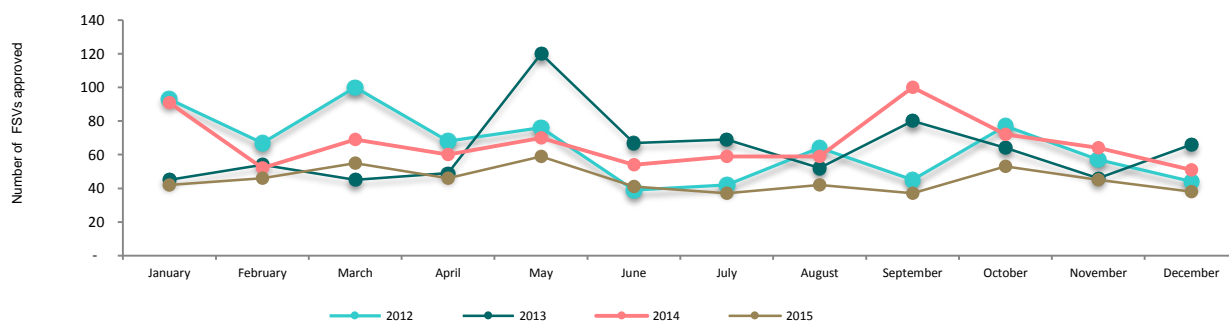
Middle East: Total student visas (TSV), 2012 - 2015



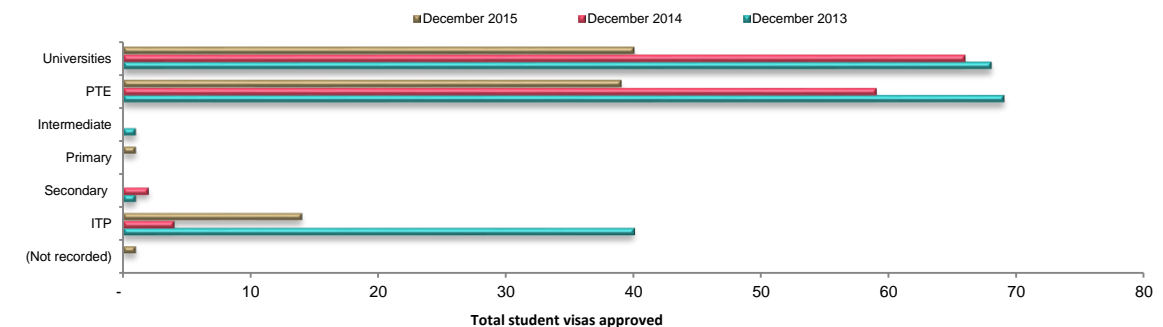
Middle East: Total student visas issued by sector, YTD



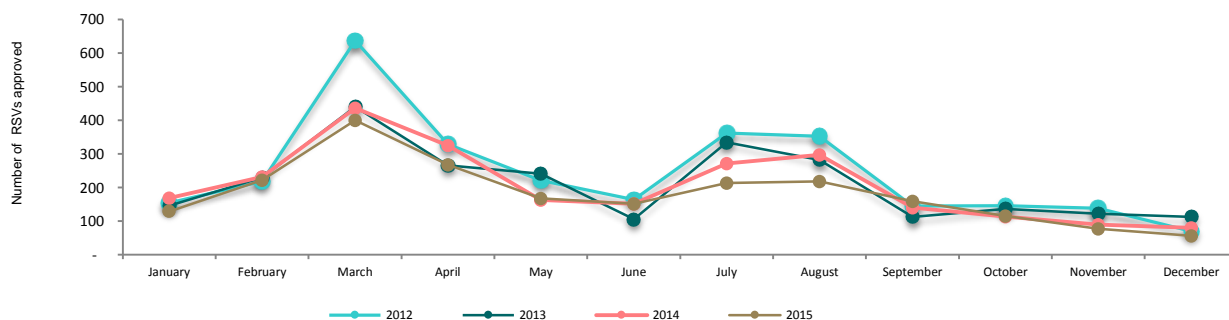
Middle East: First time student visas (FSV), 2012 - 2015



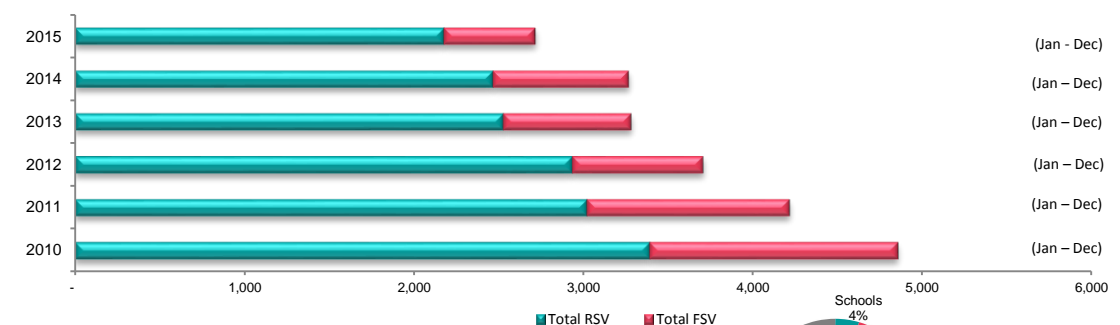
Middle East: Total student visas issued by sector, December



Middle East: Renewed student visas (RSV), 2012 - 2015



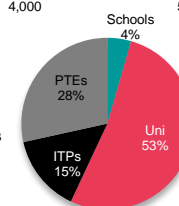
Middle East: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- This region experienced significant declines in 2015. TSV were down 17% (-550) and FSV down 32% (-260).
- December results were negative also with FSVs down 25% (-13) and TSVs down 27% (-36).
- The university sector made up 53% of TSVs in 2015 followed by the ITP sector with 15%.

YTD 2015 sector breakdown of TSVs



Saudi Arabia:

December RSV

↓ -22 -35%

December FSV

↓ -8 -26%

December TSV

↓ -30 -32%

YTD RSV

↓ -271 -14%

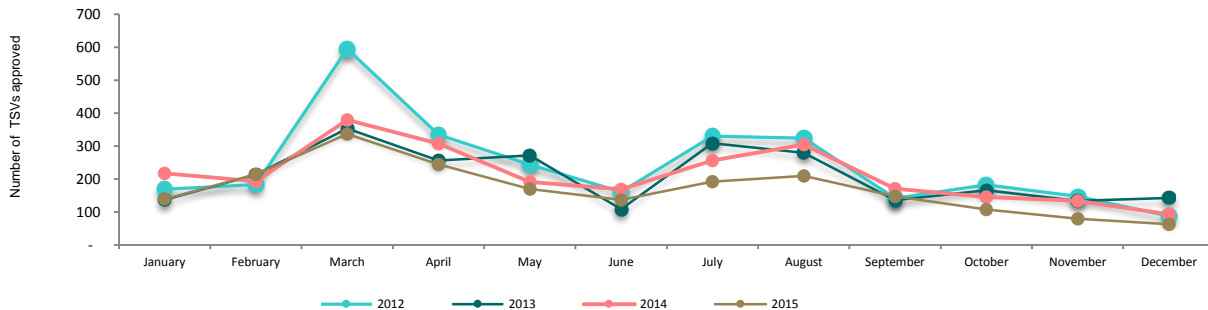
YTD FSV

↓ -249 -43%

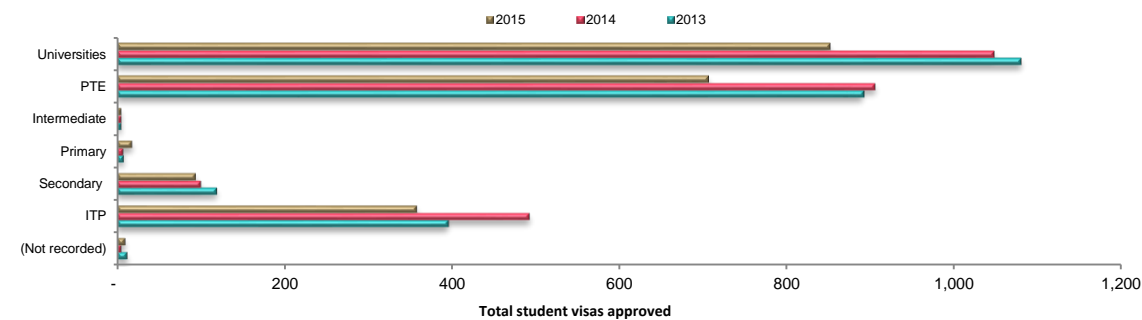
YTD TSV

↓ -520 -20%

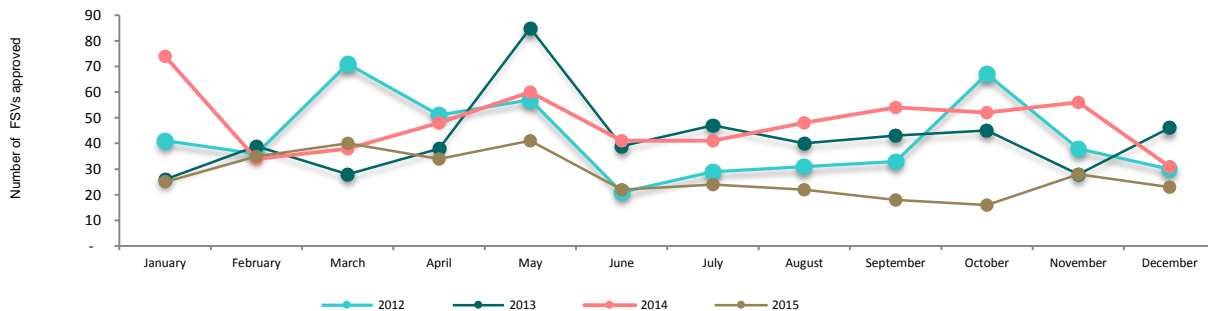
Saudi Arabia: Total student visas (TSV), 2012 - 2015



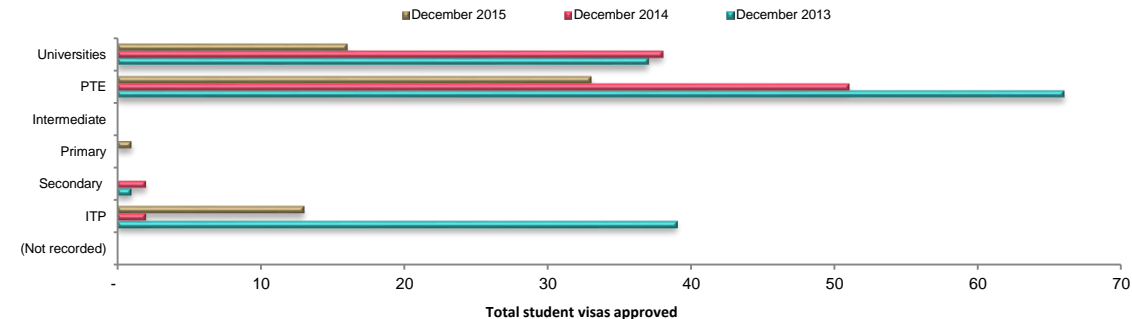
Saudi Arabia: Total student visas issued by sector, YTD



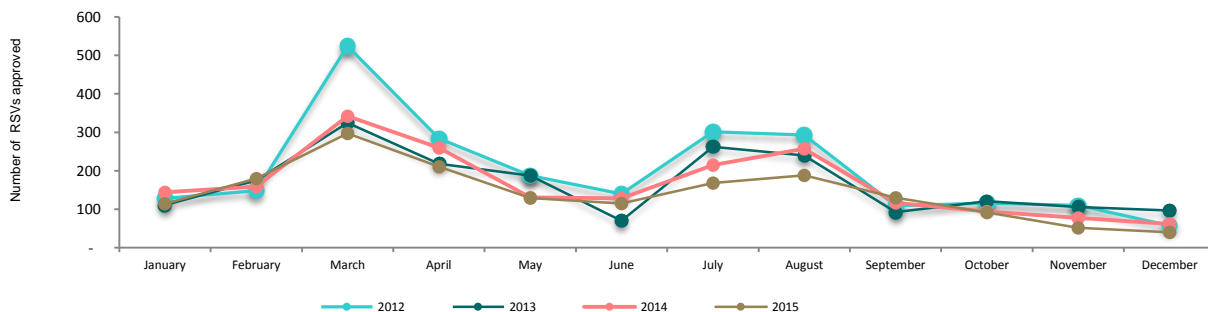
Saudi Arabia: First time student visas (FSV), 2012 - 2015



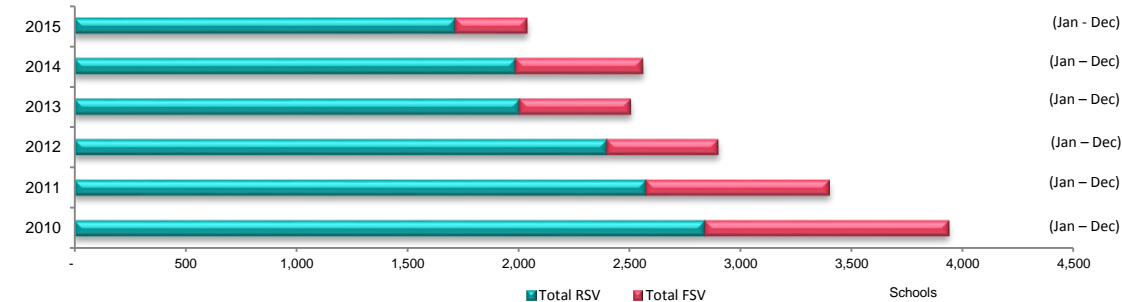
Saudi Arabia: Total student visas issued by sector, December



Saudi Arabia: Renewed student visas (RSV), 2012 - 2015



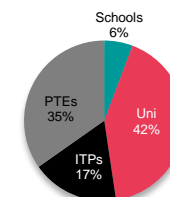
Saudi Arabia: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- 2015 results were negative with FSVs down 43% (-249) and TSVs down 20% (-520).
- This market continues to experience negative month-on-month results. December results were down FSVs 26% (-8) and TSVs down 32% (-30).
- The university sector accounts for 42% and the ITP sector 17% of TSVs approved.

YTD 2015 sector breakdown of TSVs

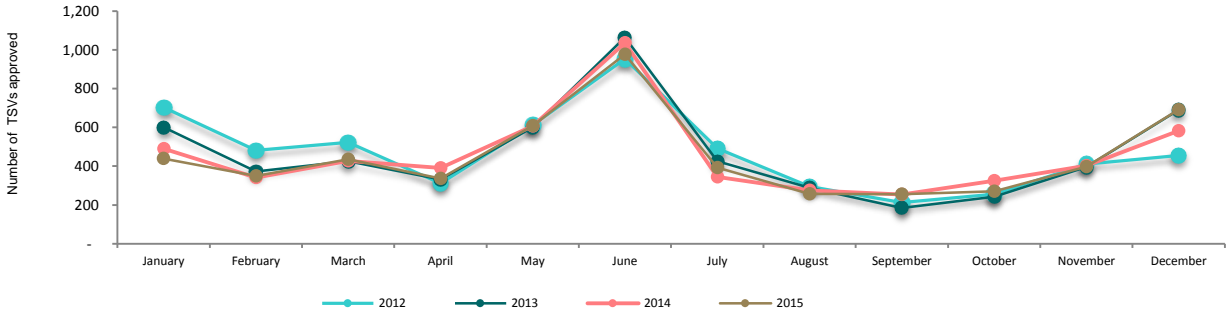


Europe:

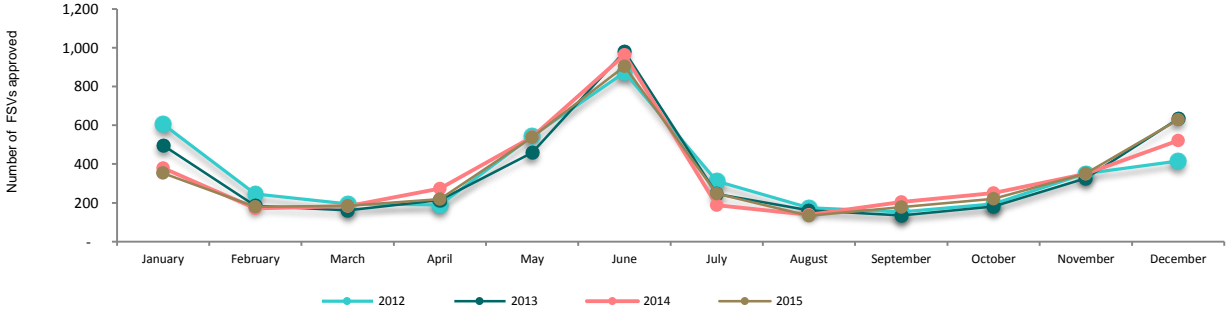
December RSV	December FSV	December TSV
➡ 2 3%	⬆ 107 20%	⬆ 109 19%

YTD RSV	YTD FSV	YTD TSV
➡ -41 -3%	➡ -24 -1%	➡ -65 -1%

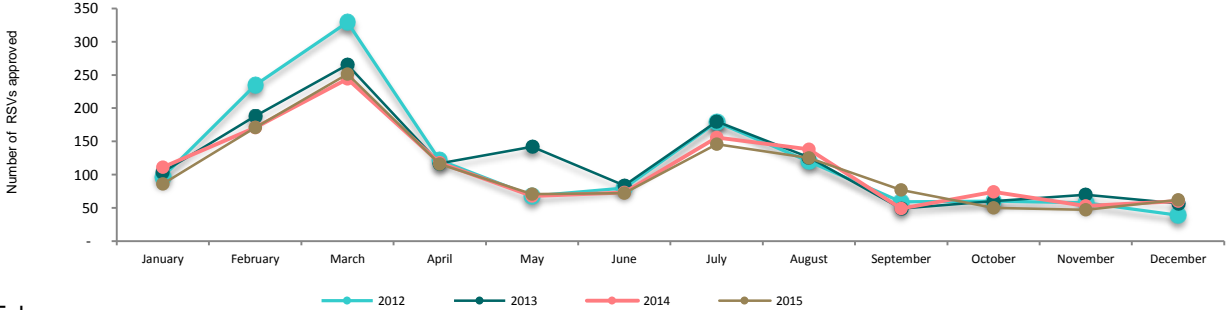
Europe: Total student visas (TSV), 2012 - 2015



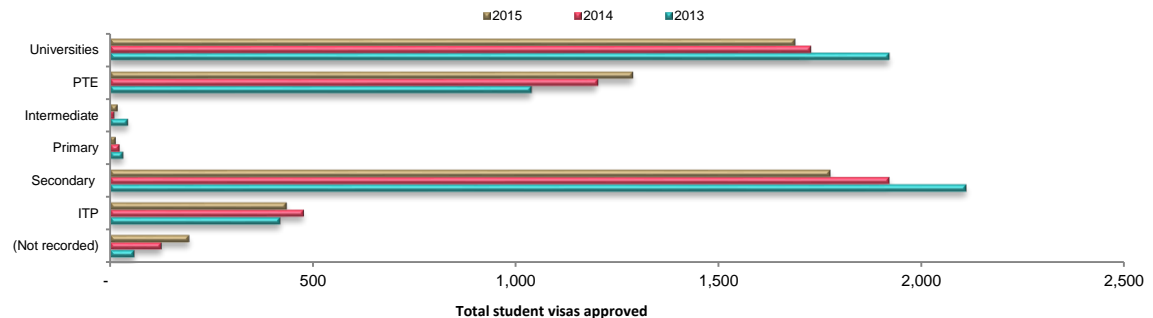
Europe: First time student visas (FSV), 2012 - 2015



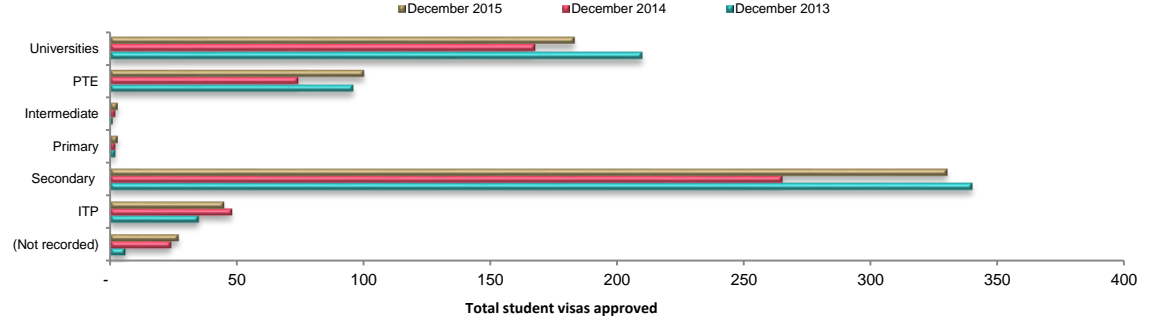
Europe: Renewed student visas (RSV), 2012 - 2015



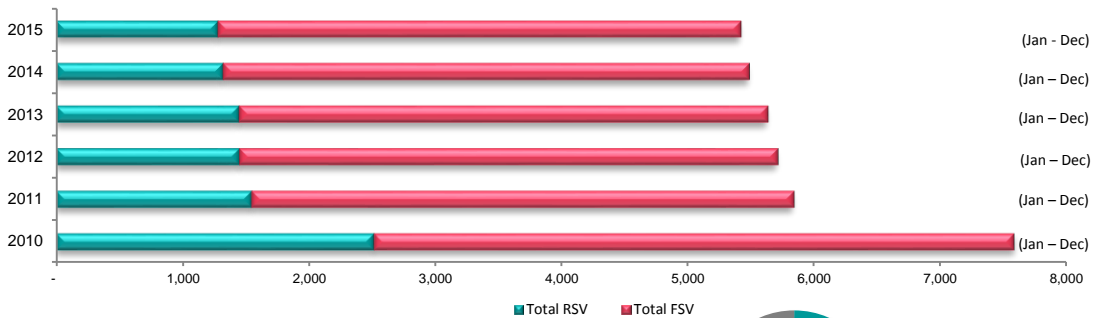
Europe: Total student visas issued by sector, YTD



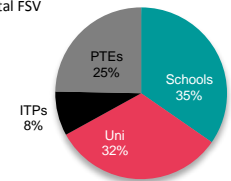
Europe: Total student visas issued by sector, December



Europe: Cumulative total for RSV vs. FSV, 2010 - 2015



YTD 2015 sector breakdown of TSVs



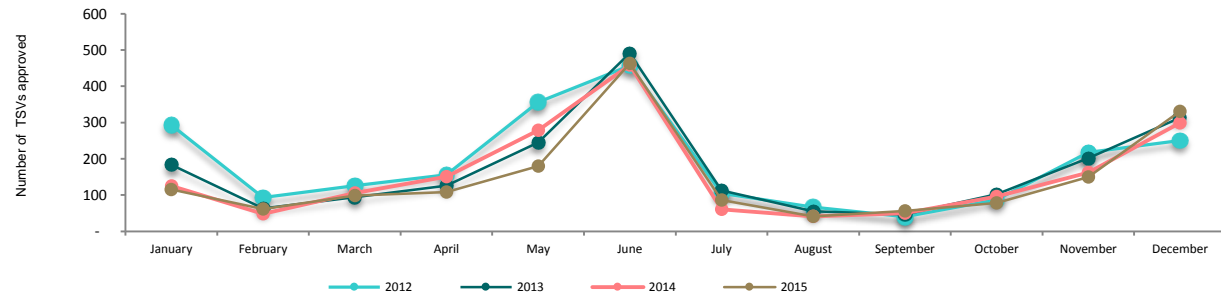
- Takeaways:
- 2015 results from Europe were flat, with TSVs down 1% (-65) and FSVs down 1% (-24).
 - December results were strong with FSVs up 20% (107) and TSVs up 19% (109).
 - The schools sector made up 35% of TSVs and universities 32% in 2015.

Germany:

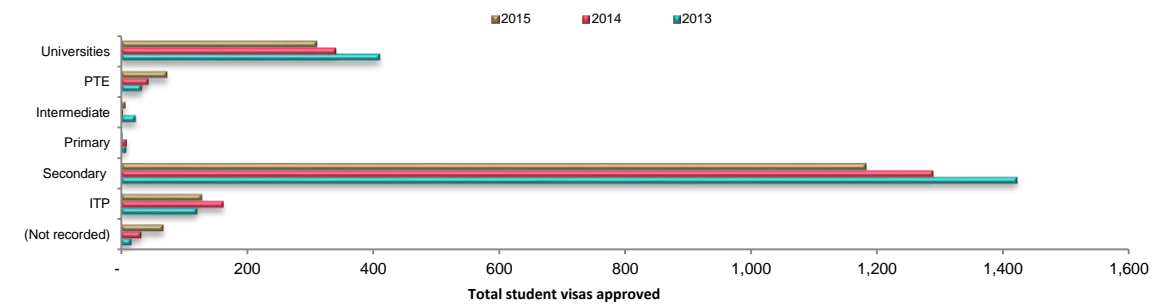
December RSV	December FSV	December TSV
↑ 8 40%	↑ 24 9%	↑ 32 11%

YTD RSV	YTD FSV	YTD TSV
↓ -28 -11%	↓ -80 -5%	↓ -108 -6%

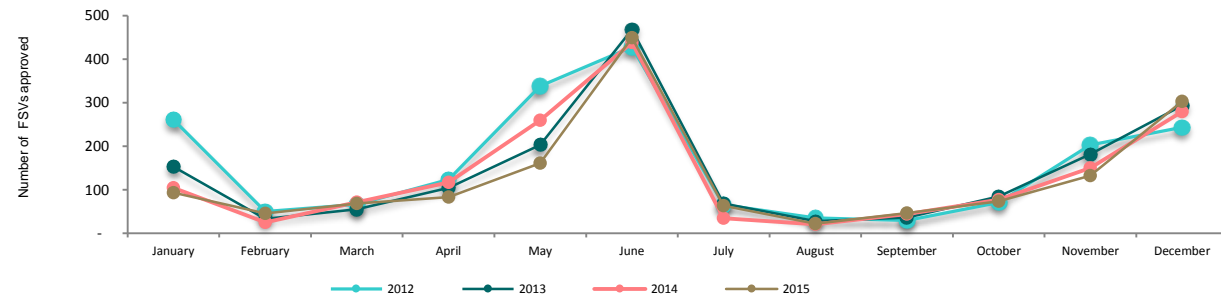
Germany: Total student visas (TSV), 2012 - 2015



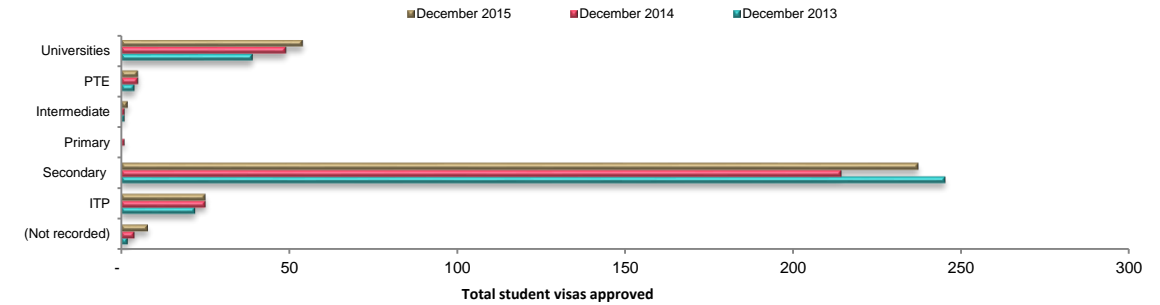
Germany: Total student visas issued by sector, YTD



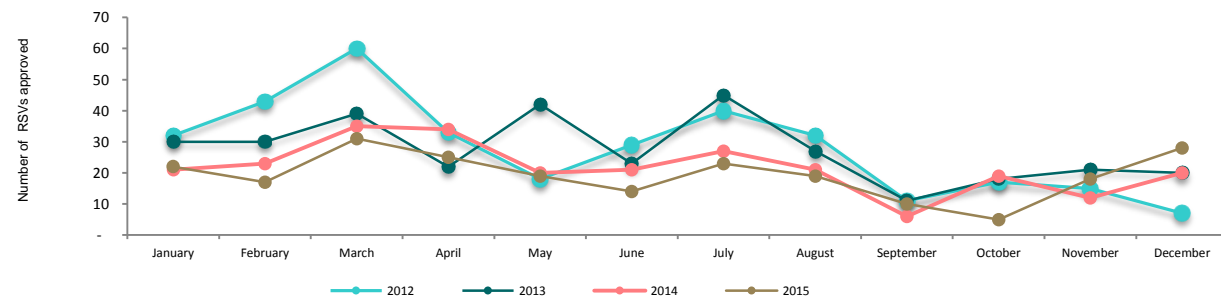
Germany: First time student visas (FSV), 2012 - 2015



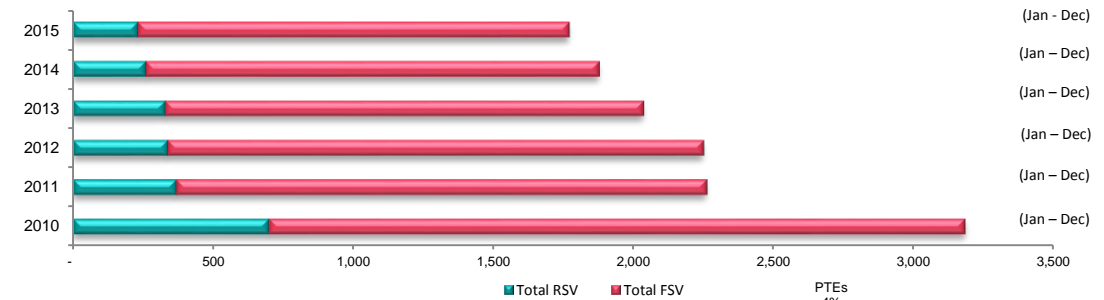
Germany: Total student visas issued by sector, November



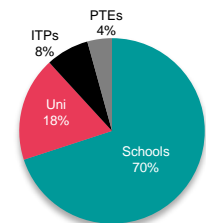
Germany: Renewed student visas (RSV), 2012 - 2015



Germany: Cumulative total for RSV vs. FSV, 2010 - 2015



YTD 2015 sector breakdown of TSVs



Takeaways:

- 2015 results for Germany were negative, with FSVs down 5% (-80) and TSVs down 6% (-108).
- December results were positive, with FSVs up 9% (24) and TSVs up 11% (32).
- The schools sector made up 70% of TSVs in 2015.

Overall:

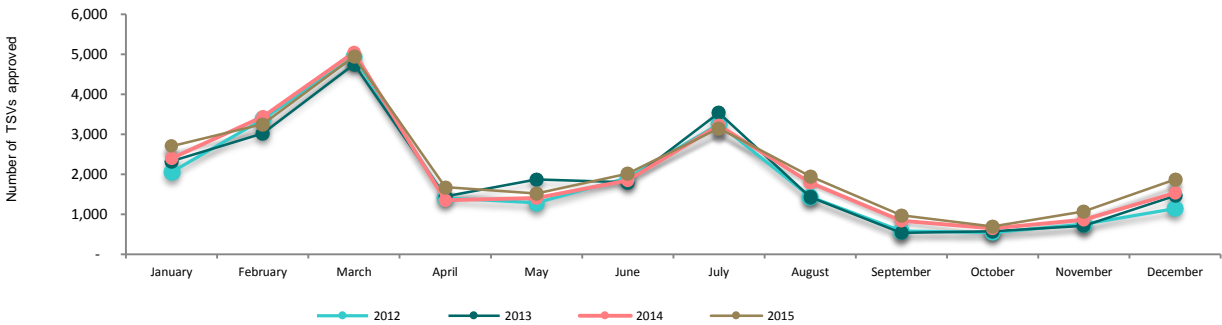
Sector overview

Universities:

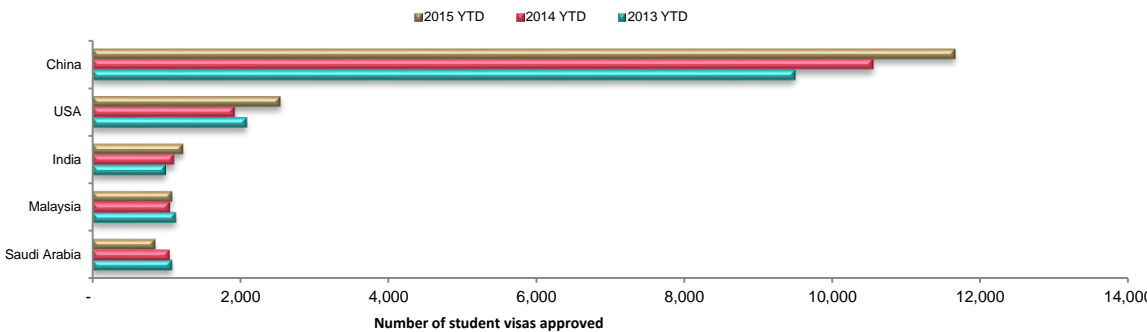
December RSV	December FSV	December TSV
↑ 45 9%	↑ 291 28%	↑ 336 22%

YTD RSV	YTD FSV	YTD TSV
→ 513 3%	↑ 934 11%	↑ 1,447 6%

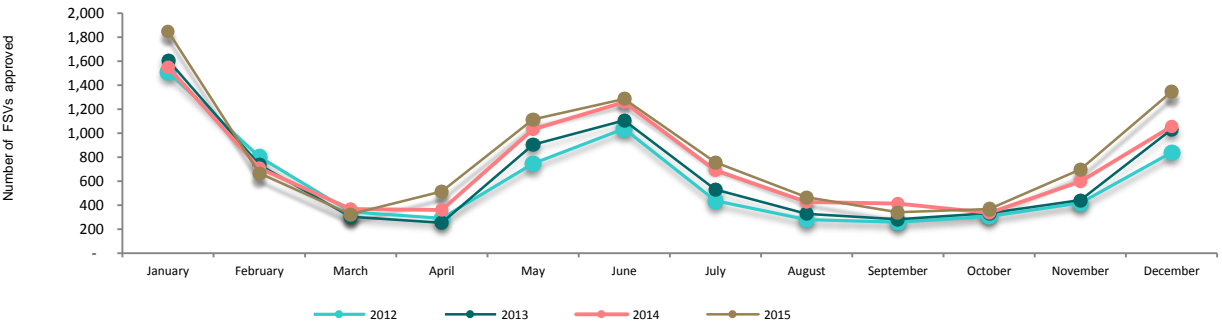
University: Total student visas (TSV), 2012 - 2015



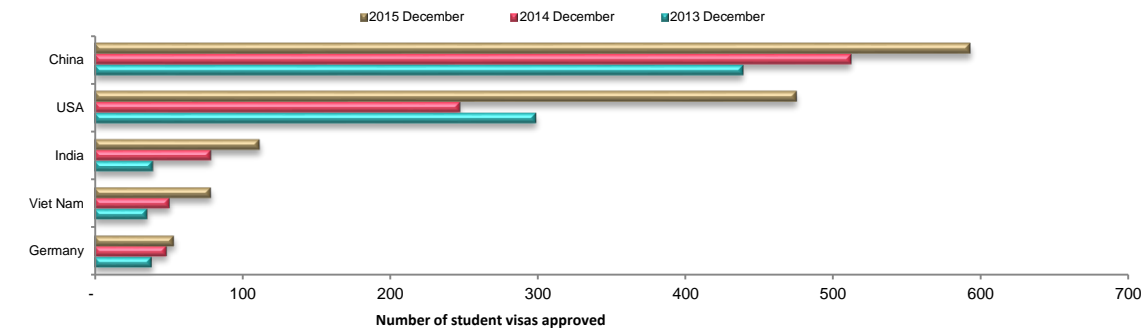
University: Total student visas issued by country, YTD



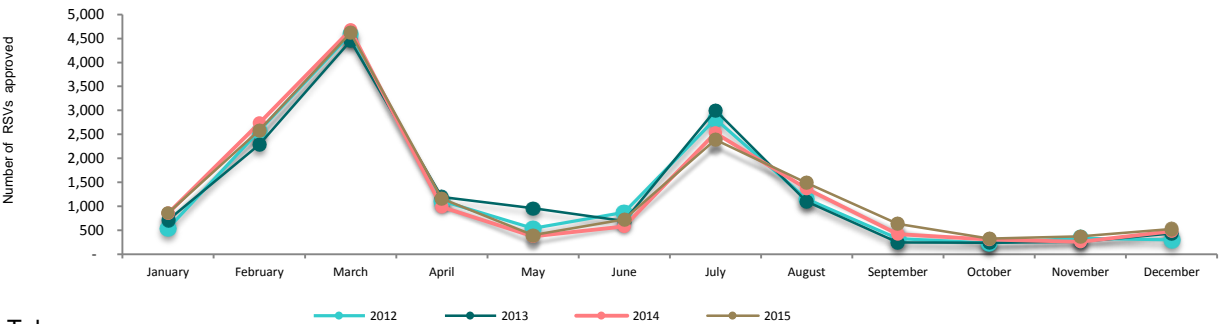
University: First time student visas (FSV), 2012 - 2015



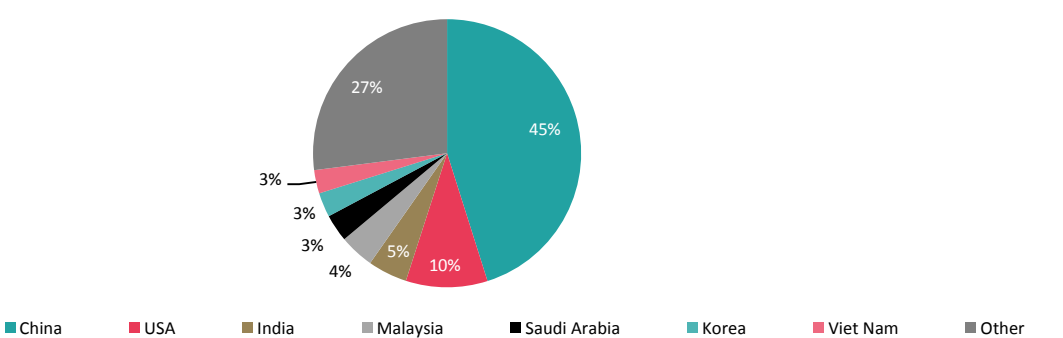
University: Total student visas issued by country, December



University: Renewed student visas (RSV), 2012 - 2015



YTD 2015 country breakdown of TSVs



Takeaways:

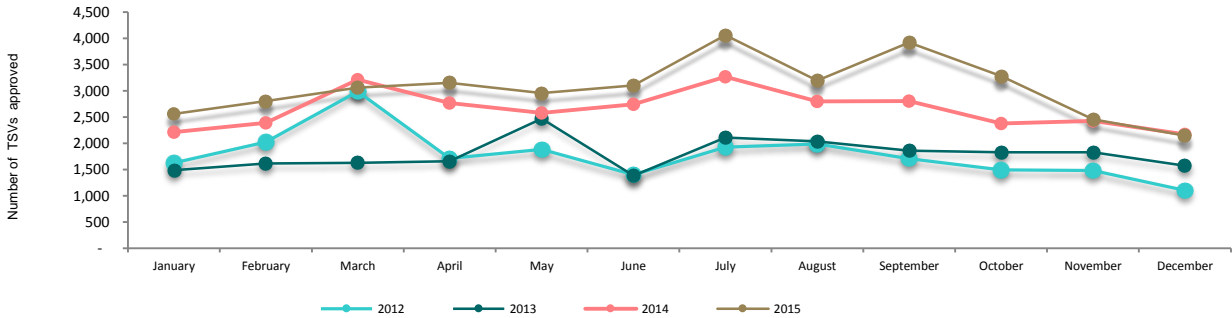
- Universities have seen good growth in 2015, with TSVs up 6% (1,447) and FSVs up 11% (934).
- December experienced strong growth in FSVs up 28% (291) and TSVs up 22% (336).
- China accounted for 45% of TSVs in 2015, with the next largest market the USA accounting for 10%.

Private Training Establishments (PTE):

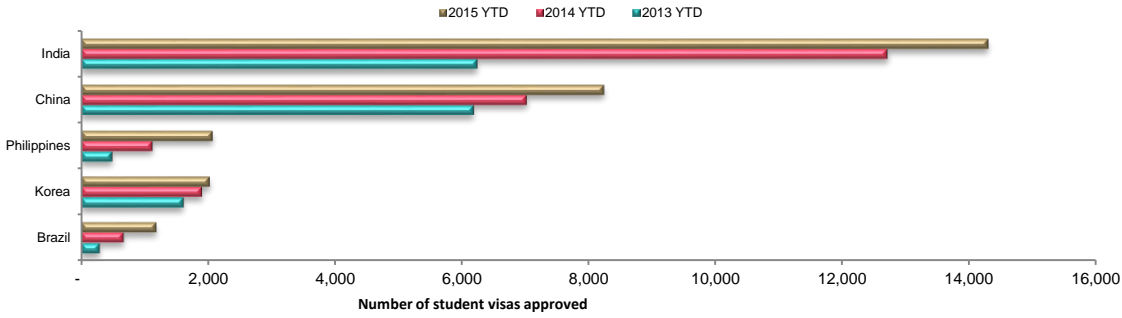


	December RSV	December FSV	December TSV	YTD RSV	YTD FSV	YTD TSV
	↑ 139 21%	↓ -161 -11%	↓ -22 -1%	↑ 3,659 30%	↑ 1,284 7%	↑ 4,943 16%

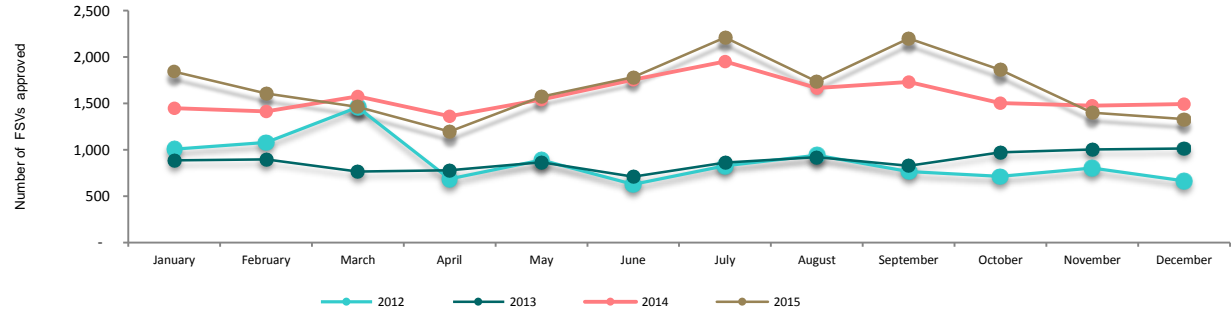
PTE: Total student visas (TSV), 2012 - 2015



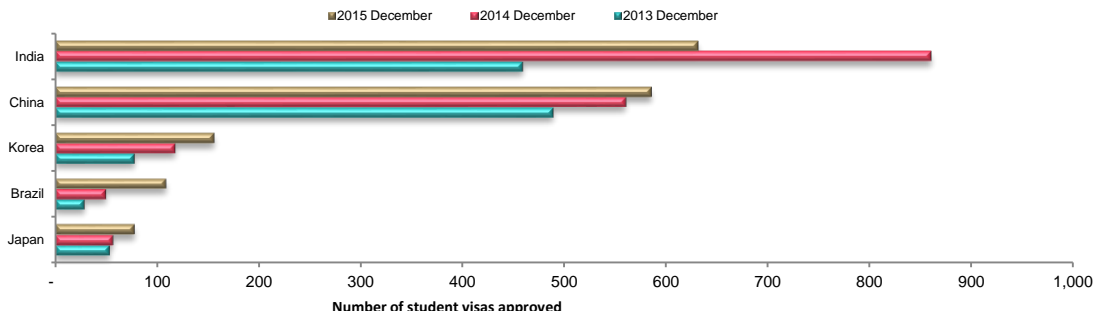
PTE: Total student visas issued by country, YTD



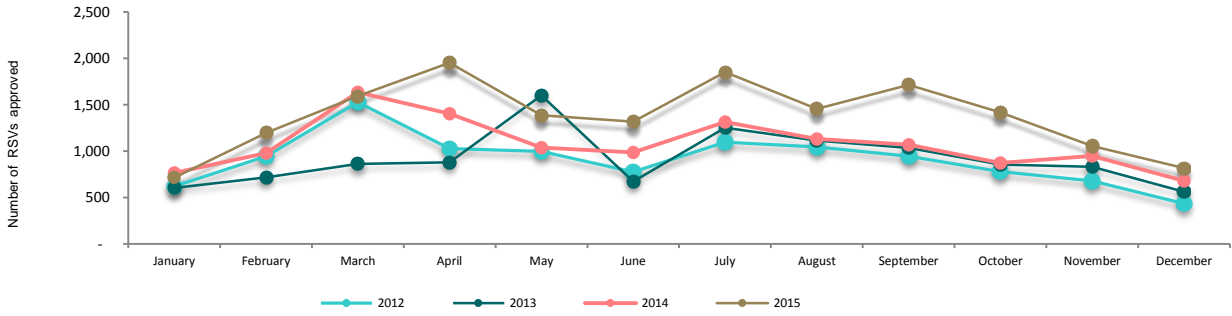
PTE: First time student visas (FSV), 2012 - 2015



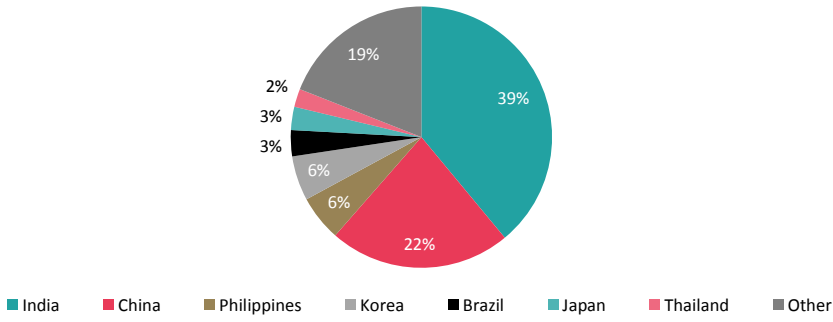
PTE: Total student visas issued by country, December



PTE: Renewed student visas (RSV), 2012 - 2015



YTD 2015 country breakdown of TSVs



Takeaways:

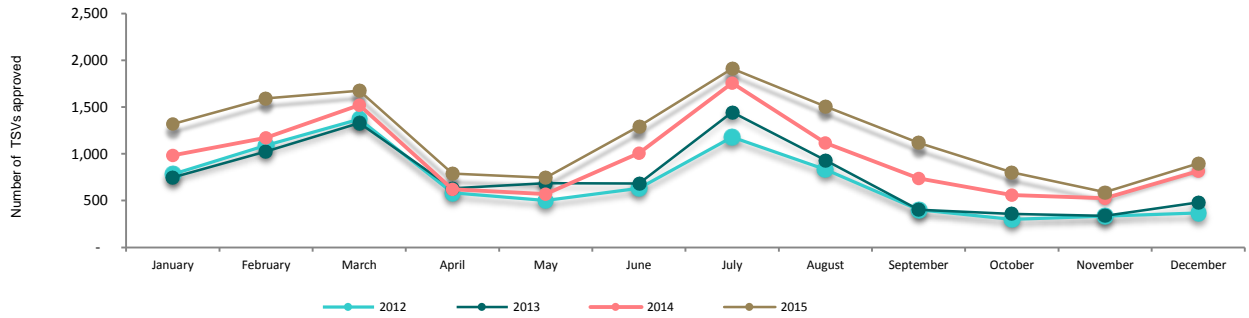
- 2015 was another strong year for the PTE sector with FSVs up 7% (1,284) and TSVs up 25% (2,853).
- December results were mixed with FSVs down 11% (-161) and TSVs were flat down 1% (-22).
- India and China made up 61% of TSVs in 2015.

Institutes of Technology and Polytechnics (ITPs):

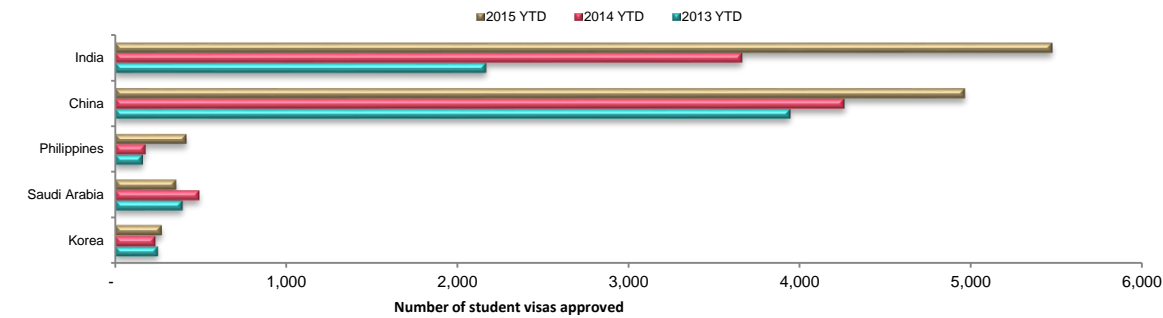


December RSV	December FSV	December TSV	YTD RSV	YTD FSV	YTD TSV
87	-8	79	929	1,924	2,853
42%	-1%	10%	16%	36%	25%

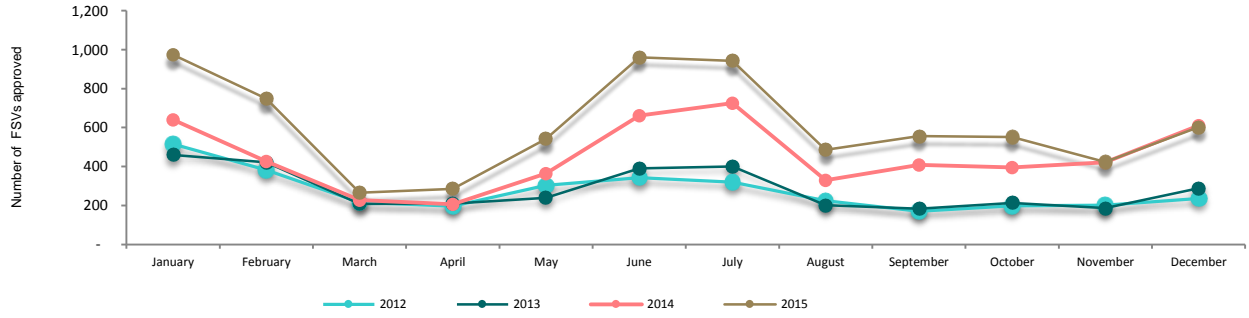
ITP: Total student visas (TSV), 2012 - 2015



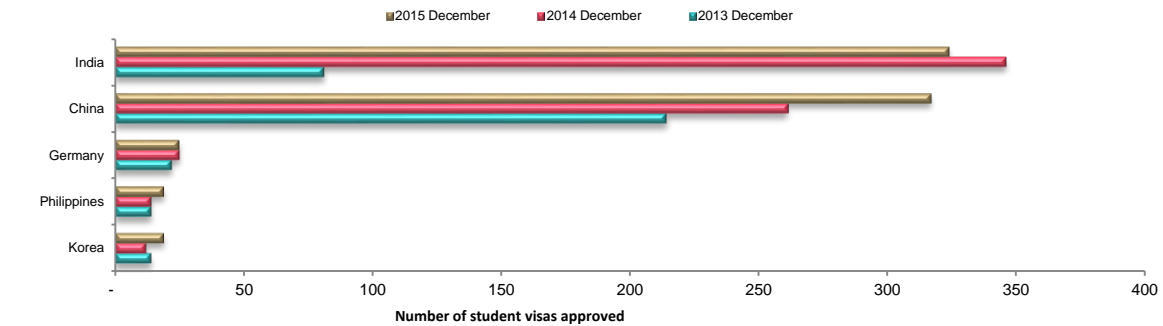
ITP: Total student visas issued by country, YTD



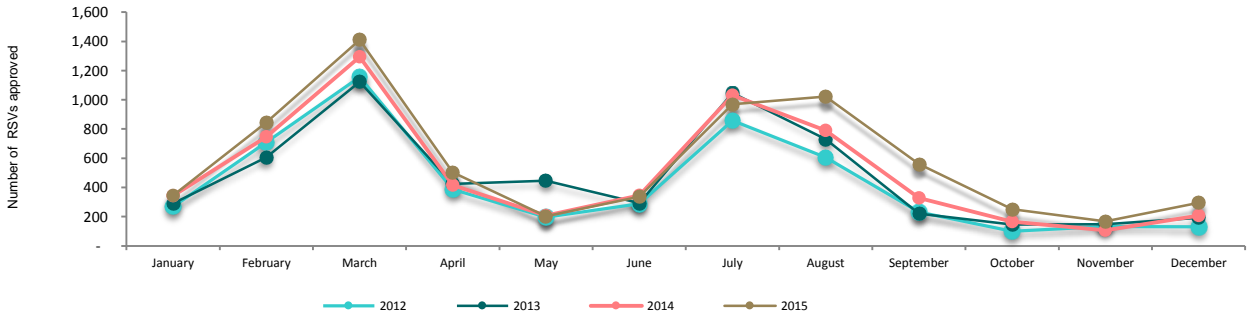
ITP: First time student visas (FSV), 2012 - 2015



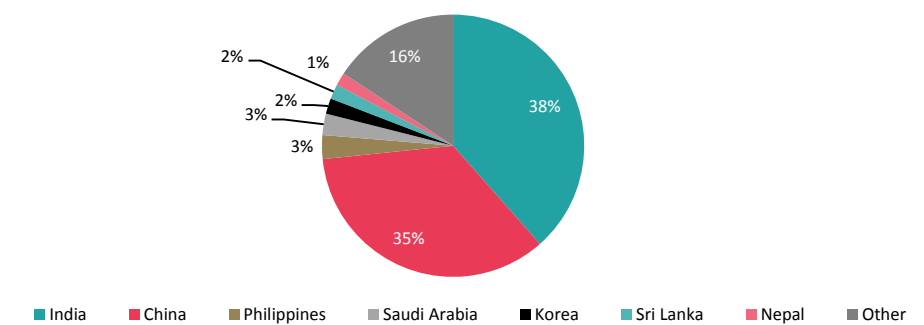
ITP: Total student visas issued by country, December



ITP: Renewed student visas (RSV), 2012 - 2015



YTD 2015 country breakdown of TSVs

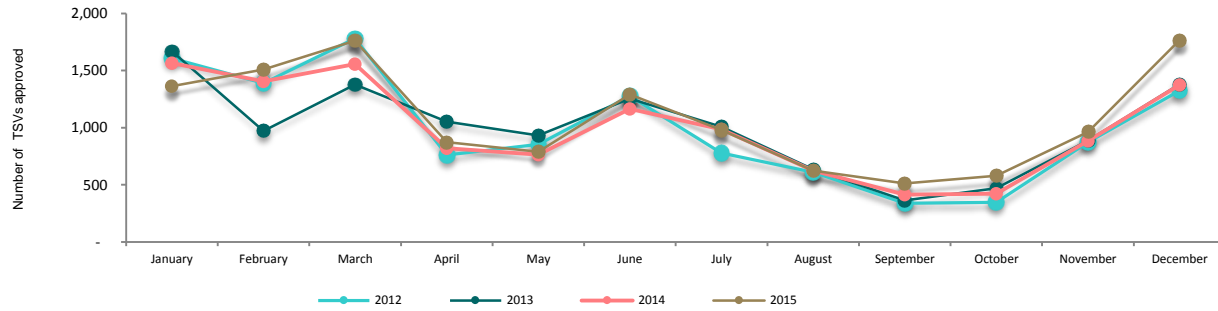


- Takeaways:
- ITPs have experienced strong growth in 2015 with TSVs up 25% (2,853) and FSVs up 36% (1,924).
 - December results were mixed with FSVs flat down 1% (-8) and TSVs up 10% (79).
 - India and China accounted for 73% of TSVs in 2015.

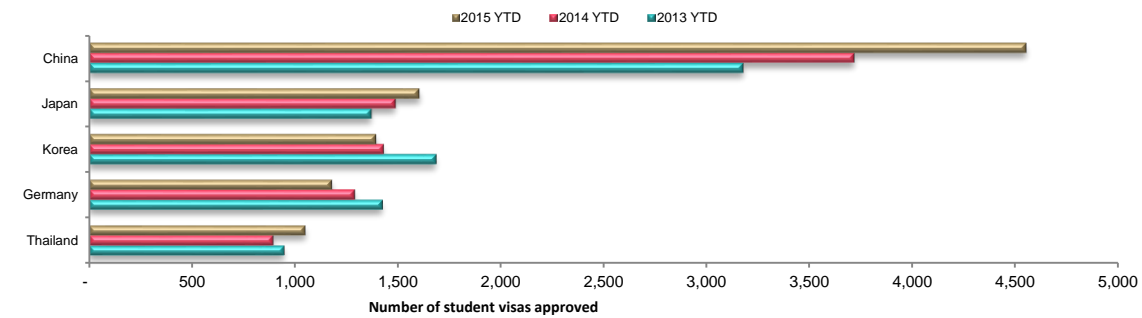
Secondary Schools:

December RSV	December FSV	December TSV	YTD RSV	YTD FSV	YTD TSV
↑ 111 32%	↑ 281 27%	↑ 392 29%	↑ 639 13%	↑ 394 6%	↑ 1,033 9%

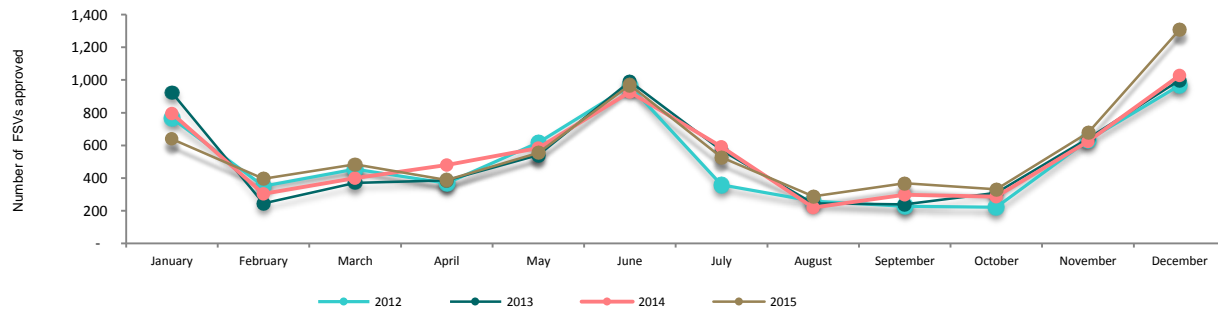
Secondary Schools: Total student visas (TSV), 2012 - 2015



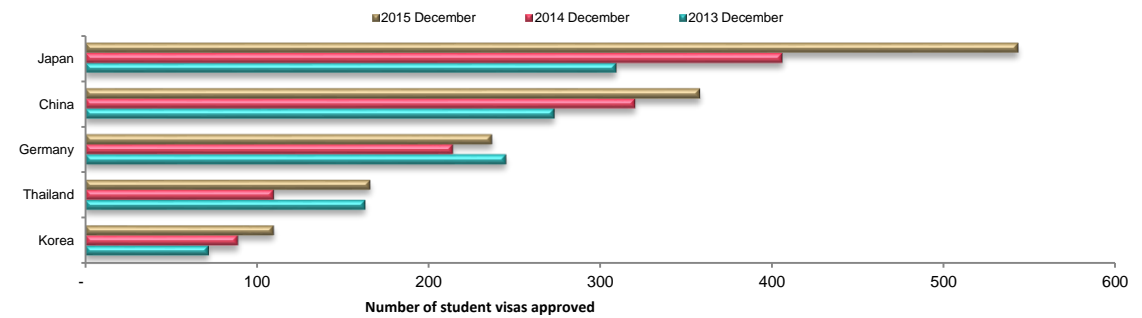
Secondary Schools: Total student visas issued by country, YTD



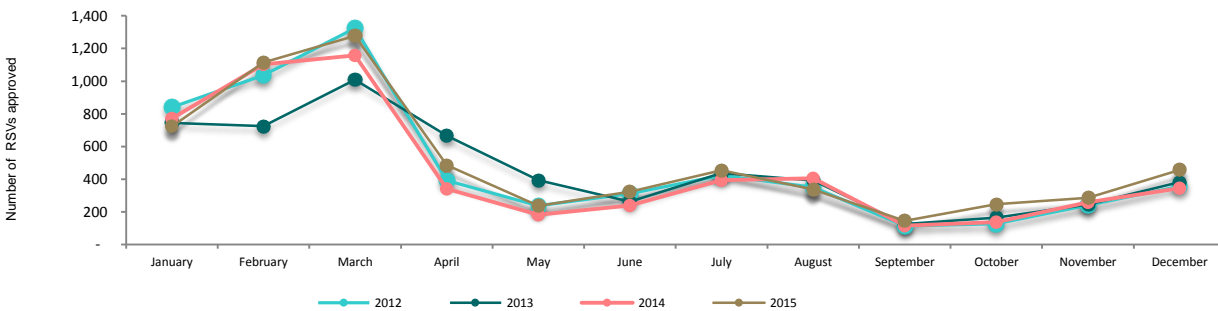
Secondary Schools: First time student visas (FSV), 2012 - 2015



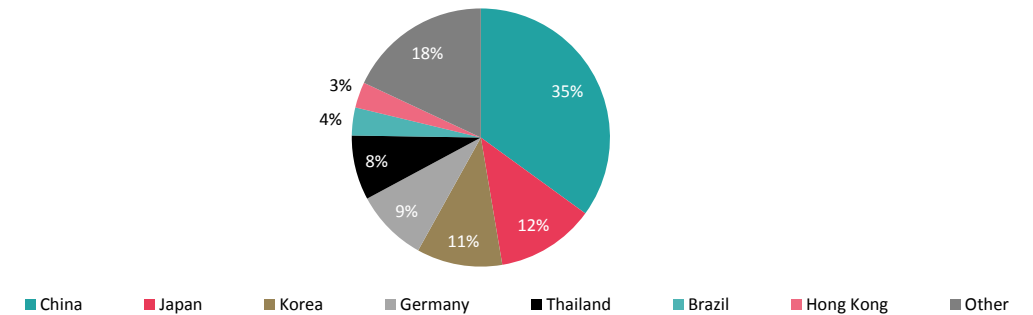
Secondary Schools: Total student visas issued by country, December



Secondary Schools: Renewed student visas (RSV), 2012 - 2015



YTD 2015 country breakdown of TSVs



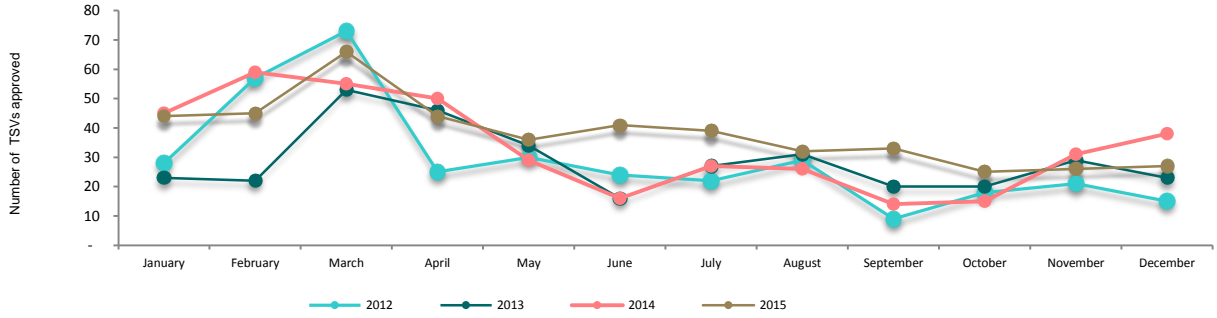
Takeaways:

- Secondary schools in 2015 experienced an increase of 9% (1,033) in TSVs, while FSVs are flat, up 6% (394).
- December results were positive with FSVs up 27% (281) and TSVs up 29% (392).
- China is the largest contributor of TSVs in 2015, with 35% of the total followed by Japan with 12%.

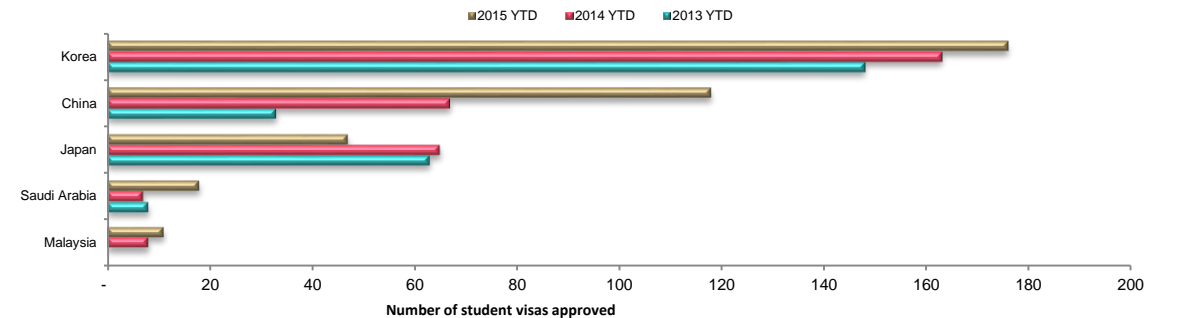
Primary Schools:

December RSV	December FSV	December TSV	YTD RSV	YTD FSV	YTD TSV
↑ 2 20%	↓ -13 -46%	↓ -11 -29%	↑ 13 8%	↑ 40 18%	↑ 53 13%

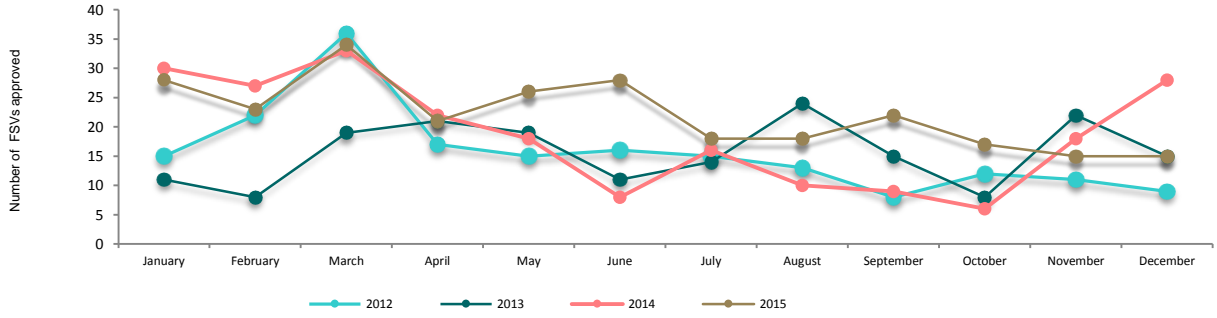
Primary Schools: Total student visas (TSV), 2012 - 2015



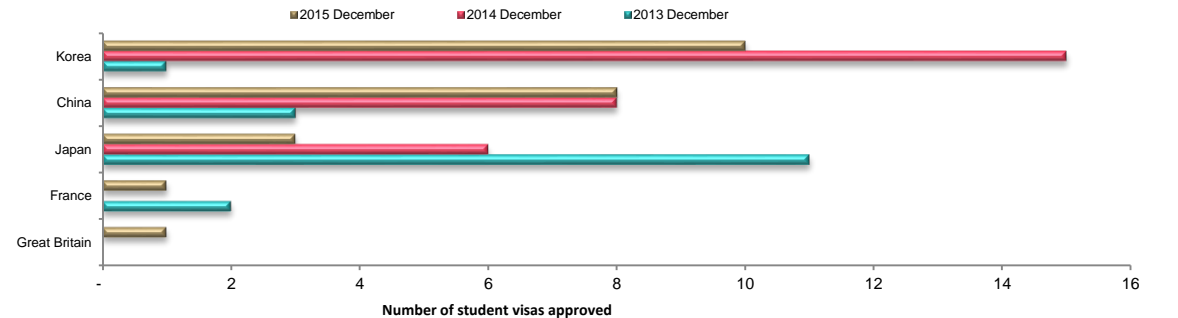
Primary Schools: Total student visas issued by country, YTD



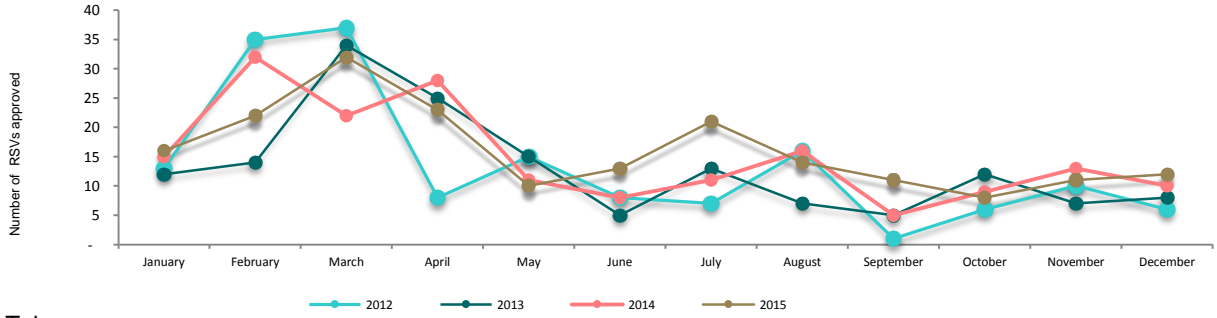
Primary Schools: First time student visas (FSV), 2012 - 2015



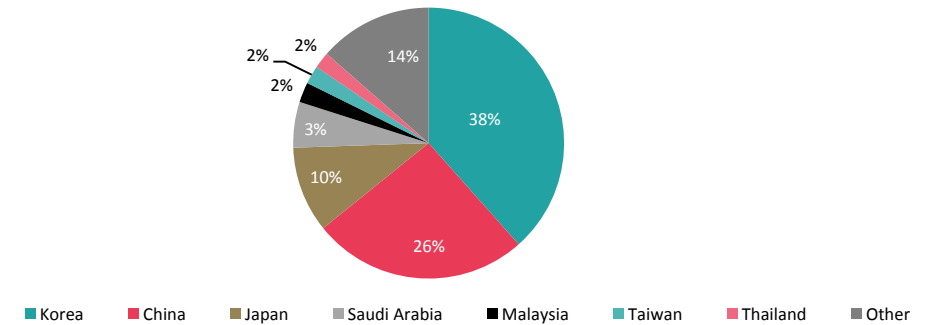
Primary Schools: Total student visas issued by country, December



Primary Schools: Renewed student visas (RSV), 2012 - 2015



YTD 2015 country breakdown of TSVs

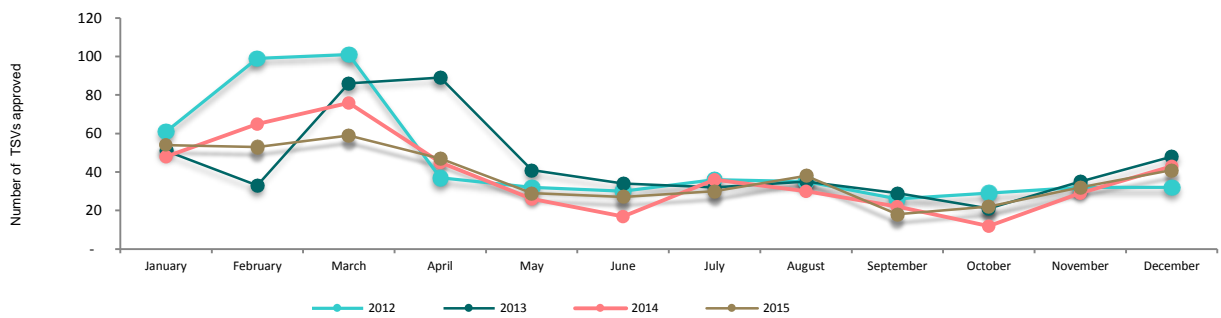


- Takeaways:
- Primary schools have tracked positively during 2015, up 13% (53) in TSVs and FSVs up 18% (40).
 - December results were negative, with FSVs down 46% (-13) and TSVs down 29% (-11).
 - Korea is the largest market for primary schools, comprising 38% of TSVs; followed by China, with 26% in 2015.

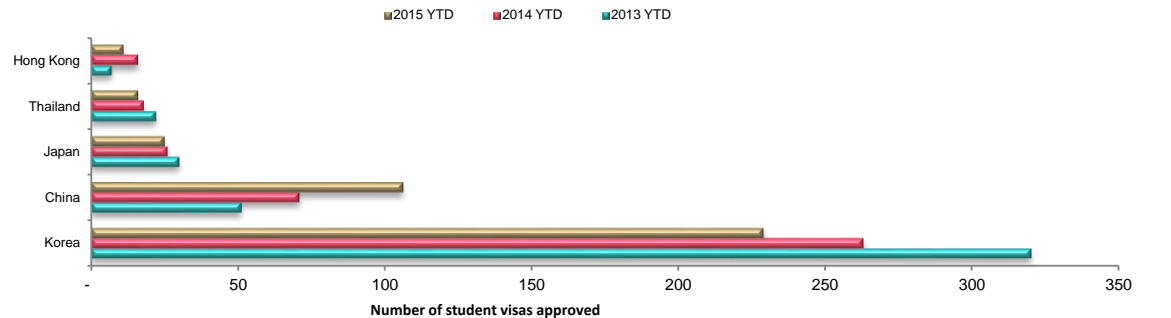
Intermediate Schools:

December RSV	December FSV	December TSV	YTD RSV	YTD FSV	YTD TSV
↓ -1 -6%	→ -1 -4%	↓ -2 -5%	↑ 8 4%	→ -7 -3%	→ 1 0%

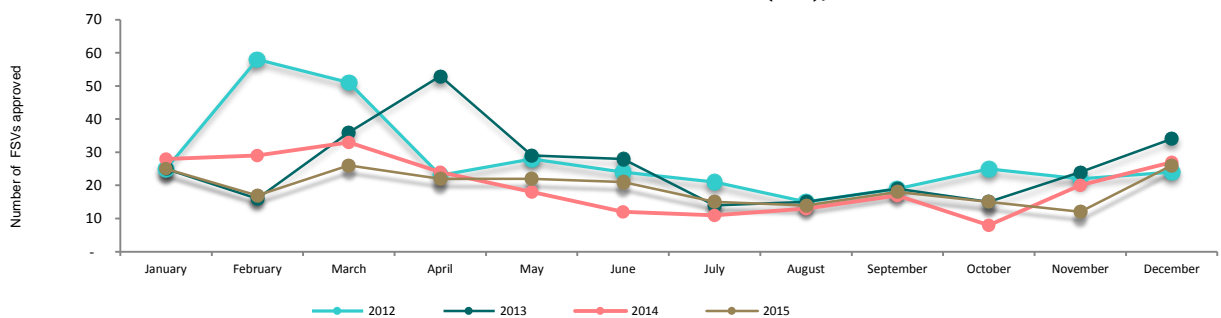
Intermediate Schools: Total student visas (TSV), 2012 - 2015



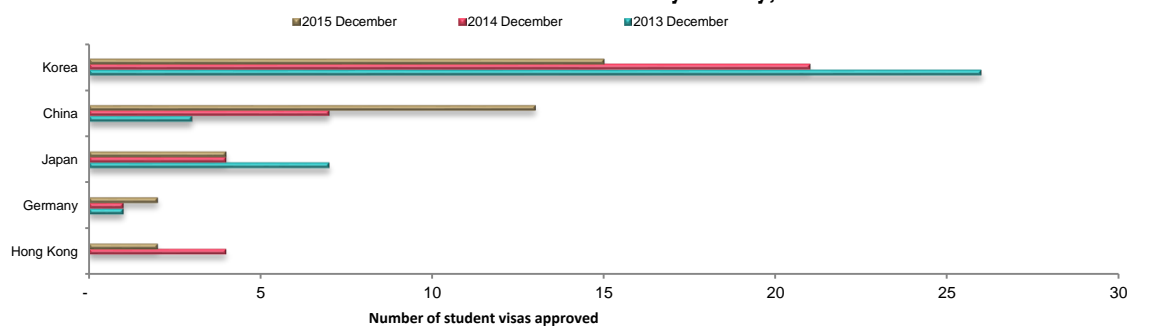
Intermediate Schools: Total student visas issued by country, YTD



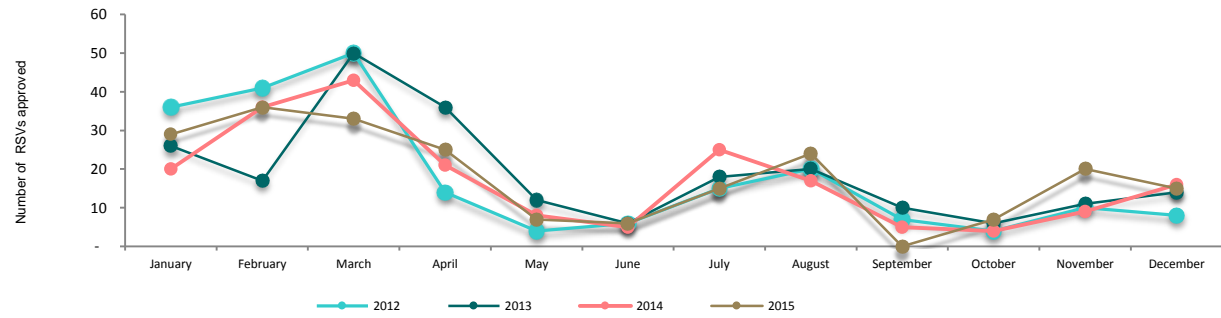
Intermediate Schools: First time student visas (FSV), 2012 - 2015



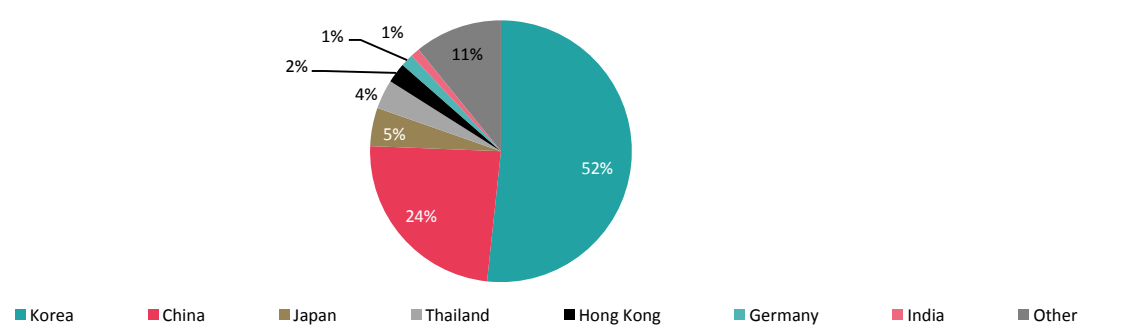
Intermediate Schools: Total student visas issued by country, December



Intermediate Schools: Renewed student visas (RSV), 2012 - 2015



YTD 2015 country breakdown of TSVs



- Takeaways:
- TSVs for Intermediate schools were flat during 2015, with TSVs flat 0% (1) and FSVs down 3% (-7).
 - December results were mixed, with TSVs down 5% (-2) and FSVs flat, down 4% (-1).
 - Korea has contributed 51% of all TSVs while China contributed 24% in 2015.