

Student Visa Dashboard

August 2015

Overall:

Market and sector overview



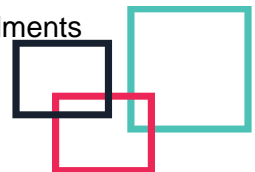
Introduction

- *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 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 re-issuing their visas).*
- *We can analyse the retention of students by subtracting first-time student visas from total student visas.*

Caveats and notes



- 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

Overall indicator of the overall performance of the market

The monthly result:

- Actual change in visa numbers
- Percentage change in visas
- Directional indicator

These graphs show a monthly trend of actual visa numbers from 2011 – 2015.

Key trends or interesting trends to consider

Overall:

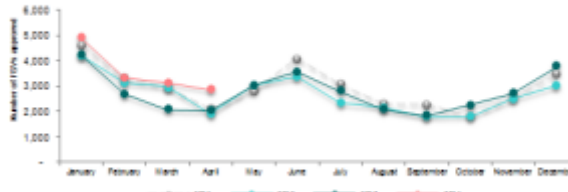
April RSV	April FSV	April TSV
- 45 -1%	833 41%	788 13%

YTD RSV	YTD FSV	YTD TSV
3,054 15%	3,198 29%	6,252 20%

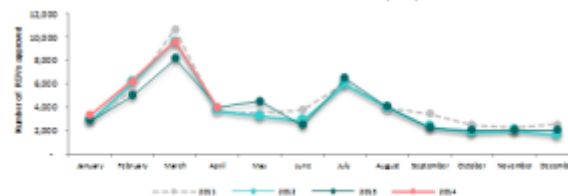
Overall: Total student visas (TSV) 2011 - 2014



Overall: First time student visas (FSV) 2011 - 2014



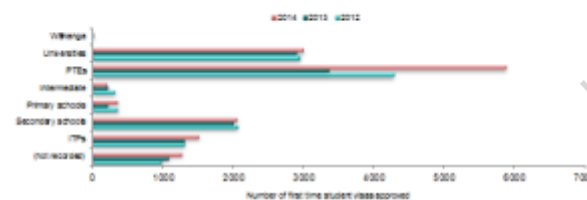
Overall: Renewed student visas (RSV) 2011 - 2014



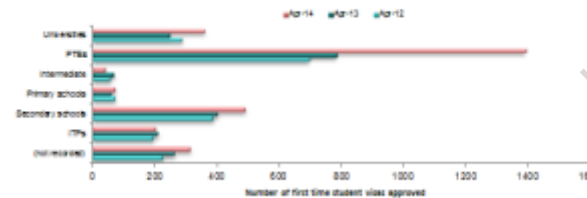
Takeaways:

- The 2014 academic year continues to trend positively – with 44% of all students having come for the year, there is an additional 6,252 TSVs when compared to the same period in 2013.
- RSVs for April have slowed down – this appears to be driven by the China market

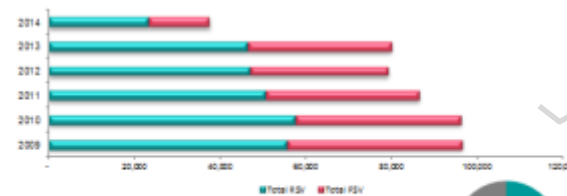
Overall: First time student visas issued by sector, YTD



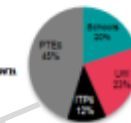
Overall: First time student visas issued by sector, April



Overall - Cumulative total for RSV vs. FSV 2009 - 2014



YTD Sector breakdown of FSVs



This pie graph represents the sector distribution of FSVs YTD.

The year-to-date result:

- Actual change in visa numbers
- Percentage change in visas
- Directional indicator

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

Shows the monthly sector performance of actual FSVs numbers.

Shows the calendar year results for FSV + 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 trends

Year-to-date (YTD)

- Year-to-date total student visas (TSV) are up 10% (6,220) and first time student visas (FSV) are up 11% (3,055). Returning student visas are up 9% (3,165).
- YTD growth in TSVs has been driven by China, India, the Philippines, the USA, and Colombia.
- The ITPs, PTEs, and universities have experienced the strongest YTD growth in FSVs, up 32% (1,654), 6% (751), and 8% (593).

August:

- August saw 16% (1,000) TSV growth and 15% (388) FSV growth on 2014.
- August TSV growth was driven by India, China, the Philippines, Japan, and Sri Lanka.
- All sectors experienced growth.

Increases

TSVs for August	Change	% change
India	540	38%
China	458	19%
Philippines	71	68%
Japan	57	32%
Sri Lanka	18	27%

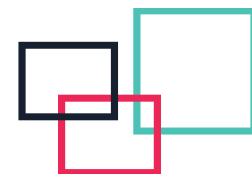
FSVs for August	Change	% change
India	176	20%
China	121	18%
Japan	70	74%
Philippines	70	80%
Sri Lanka	27	142%

Sector FSVs for August	Change	% change
ITPs	168	51%
PTEs	101	6%
Secondary schools	71	33%
Universities	44	10%
Primary	8	80%
Intermediate	1	8%

Decreases

Great Britain	-20	-43%
Hong Kong	-22	-22%
Indonesia	-26	-28%
Korea	-27	-6%
Saudi Arabia	-95	-31%

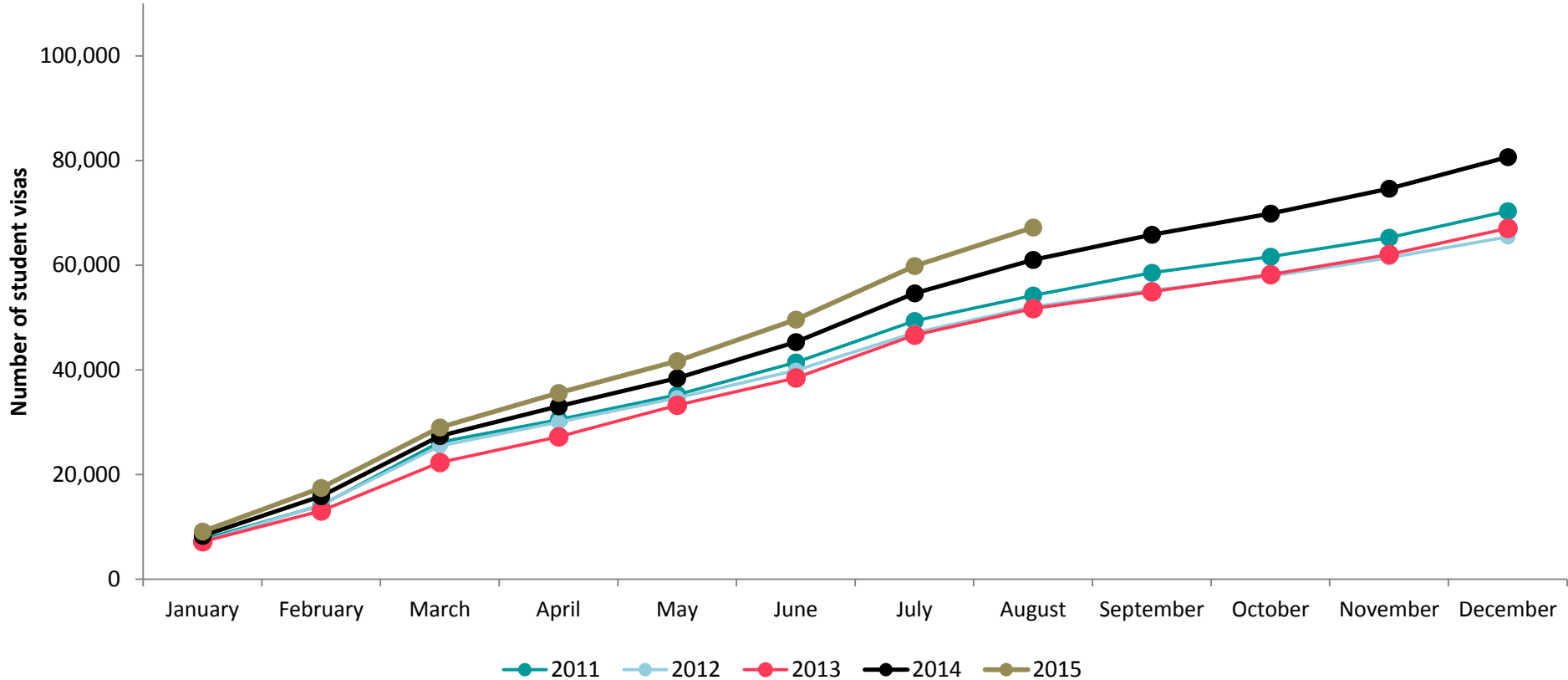
Fiji	-7	-37%
Indonesia	-13	-32%
Great Britain	-16	-67%
Saudi Arabia	-26	-54%
Nepal	-48	-59%



Tracker:

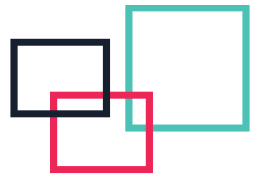
Cumulative total

ThinkNew[®]



Takeaways:

- 2015 is currently tracking above previous years, and is up 10% YTD.



Overall performance

Top 20 markets (in order of 2015 volume)

ThinkNew®



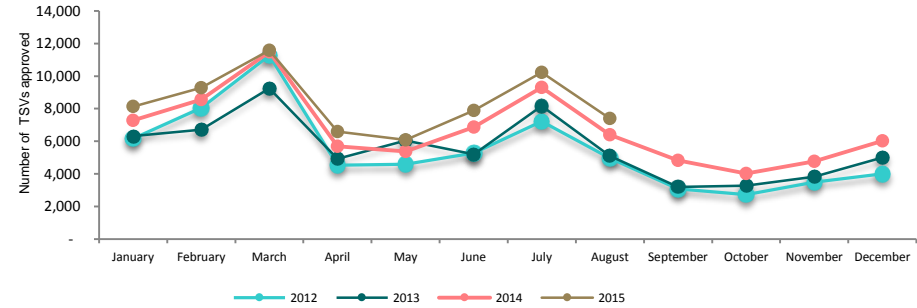
Indicator	YTD TSVs	2014	2015	Change in numbers	% change
● China		20,121	22,972	2,851	14%
● India		12,125	14,886	2,761	23%
● Korea		3,892	3,732	- 160	-4%
● Japan		2,411	2,408	- 3	0%
● USA		1,735	2,026	291	17%
● Thailand		1,860	1,820	- 40	-2%
● Saudi Arabia		2,020	1,646	- 374	-19%
● Philippines		882	1,557	675	77%
● Brazil		1,295	1,391	96	7%
● Viet Nam		1,326	1,250	- 76	-6%
● Malaysia		1,183	1,221	38	3%
● Germany		1,270	1,154	- 116	-9%
● Hong Kong		908	930	22	2%
● Taiwan		702	664	- 38	-5%
● Colombia		500	663	163	33%
● Fiji		725	661	- 64	-9%
● Sri Lanka		530	636	106	20%
● Indonesia		523	531	8	2%
● Russia		476	484	8	2%
● Great Britain		447	471	24	5%
● Grand Total		60,997	67,217	6,220	10%

Indicator	YTD FSVs	2014	2015	Change in numbers	% change
● India		8,126	9,084	958	12%
● China		5,000	6,021	1,021	20%
● USA		1,447	1,778	331	23%
● Philippines		702	1,366	664	95%
● Korea		1,353	1,351	- 2	0%
● Japan		1,249	1,327	78	6%
● Brazil		1,130	1,148	18	2%
● Germany		1,068	984	- 84	-8%
● Thailand		920	787	- 133	-14%
● Colombia		416	509	93	22%
● Malaysia		292	422	130	45%
● Viet Nam		345	361	16	5%
● Chile		310	359	49	16%
● Sri Lanka		211	328	117	55%
● Great Britain		276	323	47	17%
● France		266	249	- 17	-6%
● Saudi Arabia		384	244	- 140	-36%
● Bangladesh		192	232	40	21%
● Fiji		254	222	- 32	-13%
● Indonesia		222	207	- 15	-7%
● Grand Total		27,535	30,590	3,055	11%

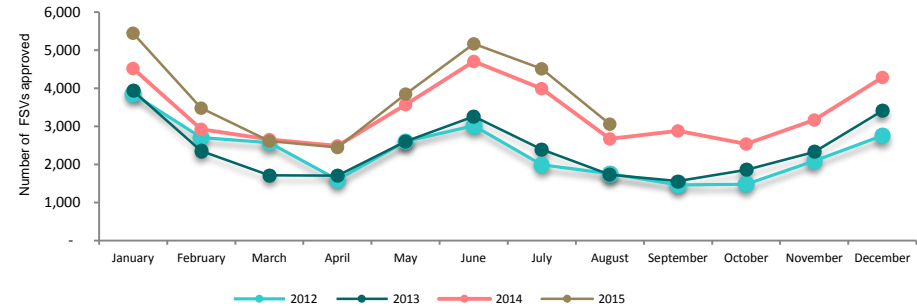
August RSV		August FSV		August TSV	
↑	612	16%	↑	388	15%
↑			↑	1,000	16%

YTD RSV		YTD FSV		YTD TSV	
↑	3,165	9%	↑	3,055	11%
↑			↑	6,220	10%

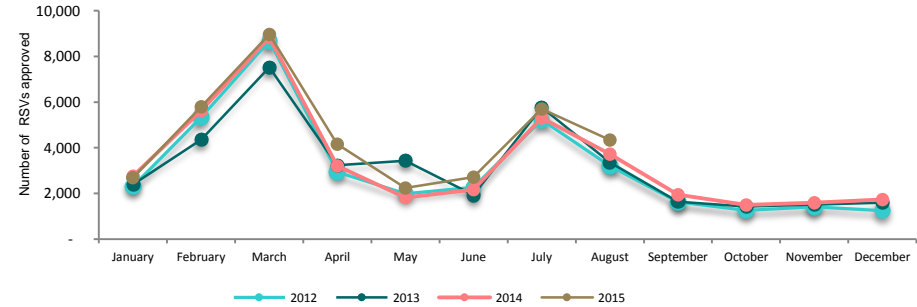
Overall: Total student visas (TSV) 2012 - 2015



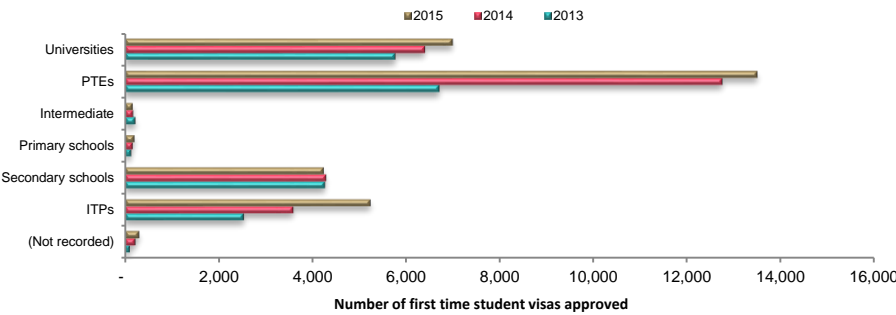
Overall: First time student visas (FSV) 2012 - 2015



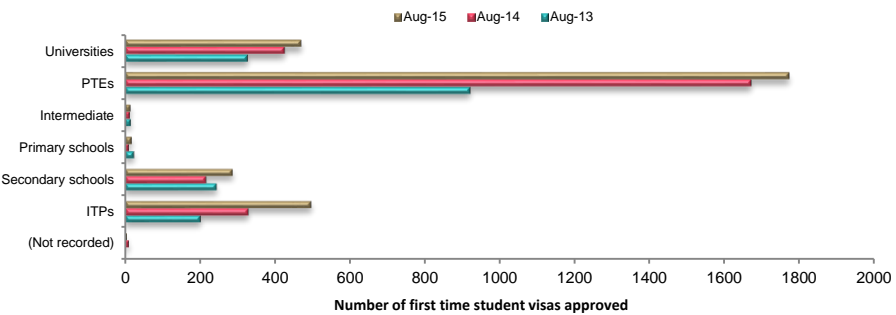
Overall: Renewed student visas (RSV) 2012 - 2015



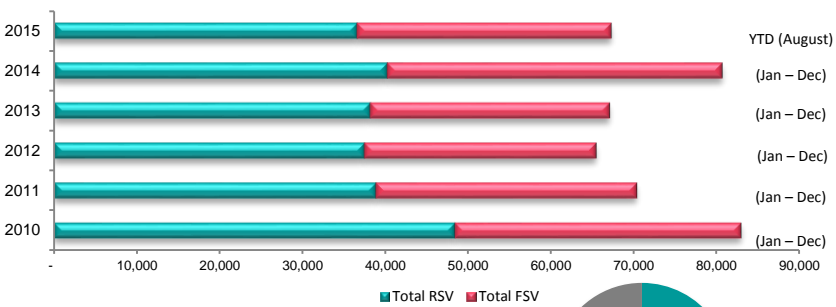
Overall: First time student visas issued by sector, YTD



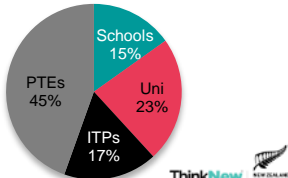
Overall: First time student visas issued by sector, August



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






YTD 2015 sector breakdown of FSVs



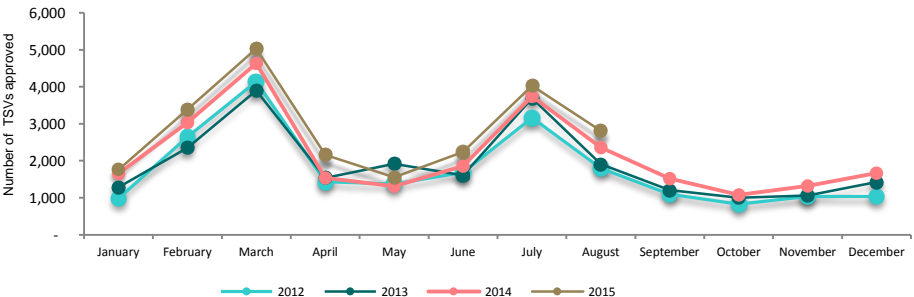
Takeaways:

- TSVs and FSVs have experienced strong growth YTD, up 10% and 11% respectively.
- YTD there has been strong growth in the universities, ITPs and PTEs, up 9%, 46%, and 6%.

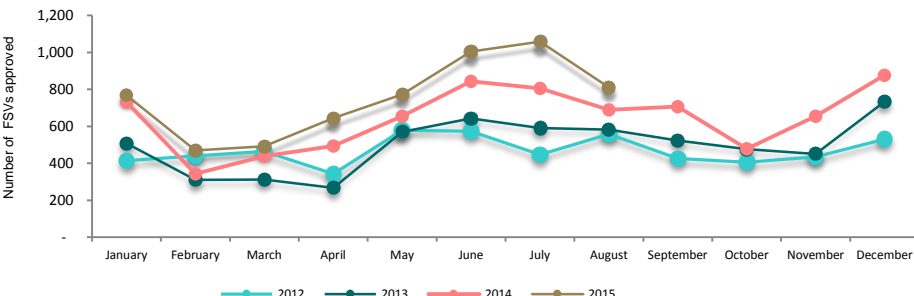
China:

August RSV		August FSV		August TSV	
	337	20%		121	18%
	458	19%			

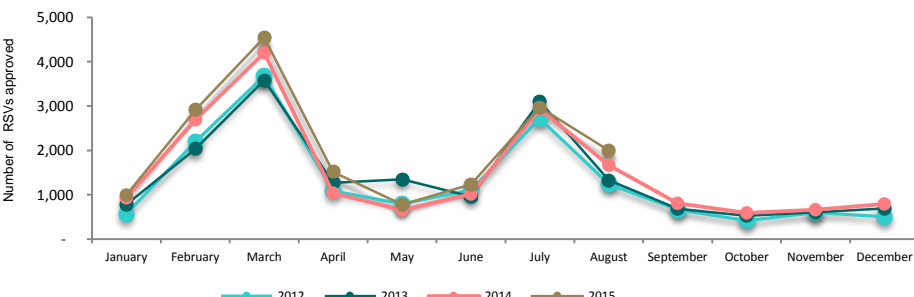
China: Total student visas (TSV) 2012 - 2015



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






China: Renewed student visas (RSV) 2012 - 2015



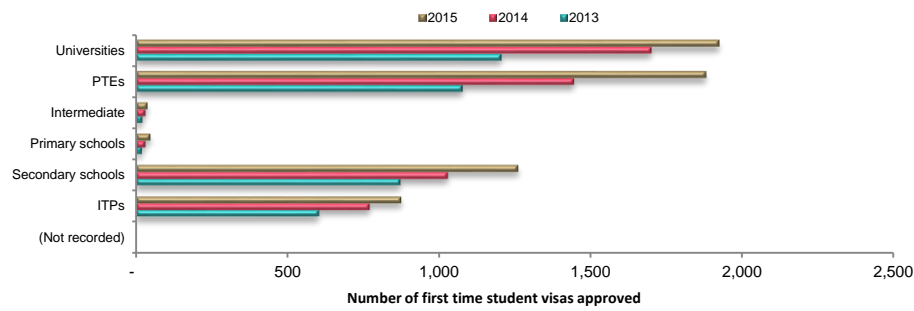
Takeaways:

- China has experienced strong growth so far in 2015, up 14% (2,851) YTD in TSVs and 20% (1,021) in FSVs.
- All sectors have experienced growth YTD.

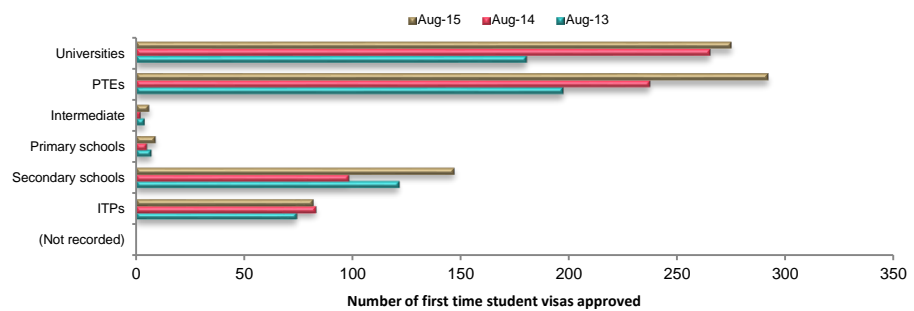
YTD (January to August)

YTD RSV		YTD FSV		YTD TSV	
	1,830	12%		1,021	20%
	2,851	14%			

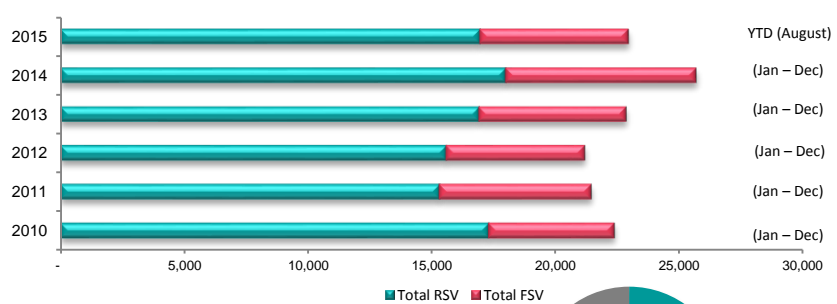
China: First time student visas issued by sector, YTD



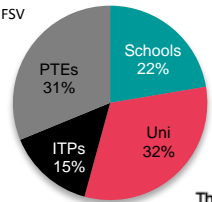
China: First time student visas issued by sector, August



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



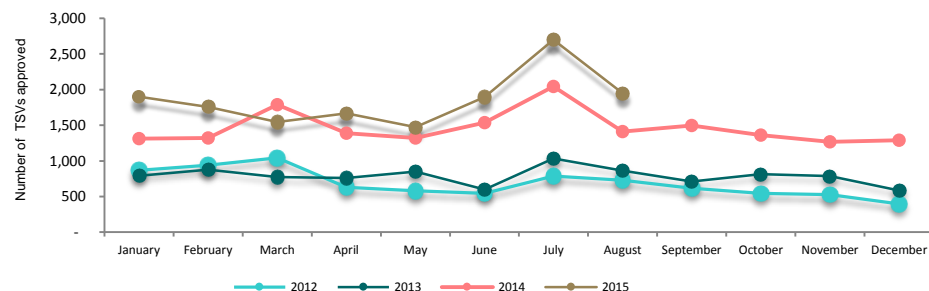
YTD 2015 sector breakdown of FSVs



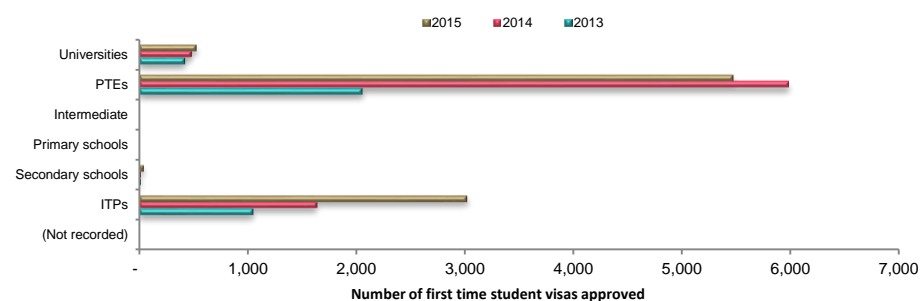
August RSV			August FSV		August TSV			
↑	364	71%	↑	176	20%	↑	540	38%

YTD RSV		YTD FSV		YTD TSV	
↑ 1,803	45%	↑ 958	12%	↑ 2,761	23%

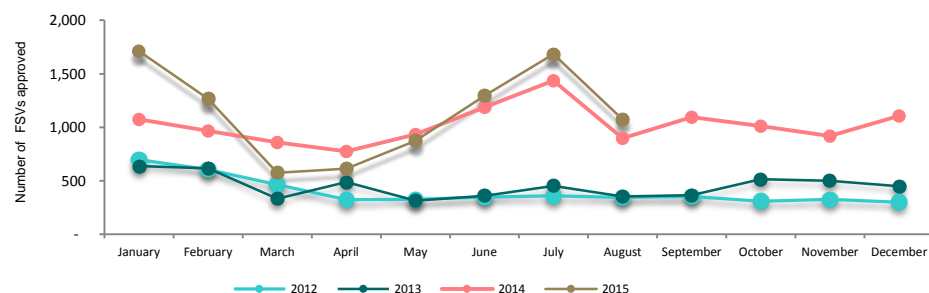
India: Total student visas (TSV) 2012 - 2015



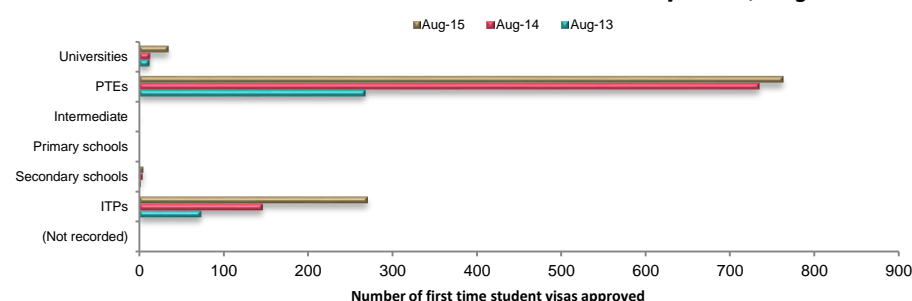
India: First time student visas issued by sector, YTD



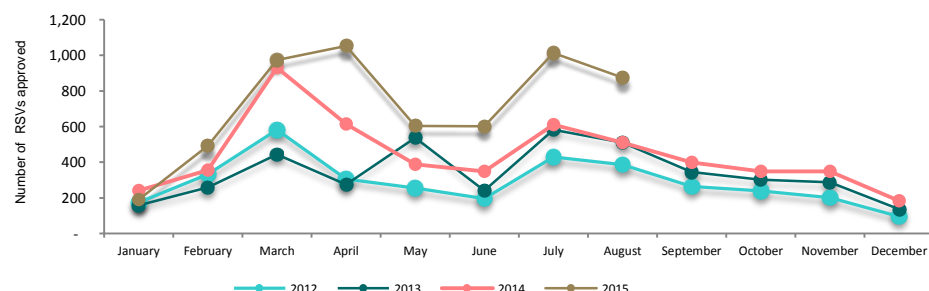
India: First time student visas (FSV) 2012 - 2015



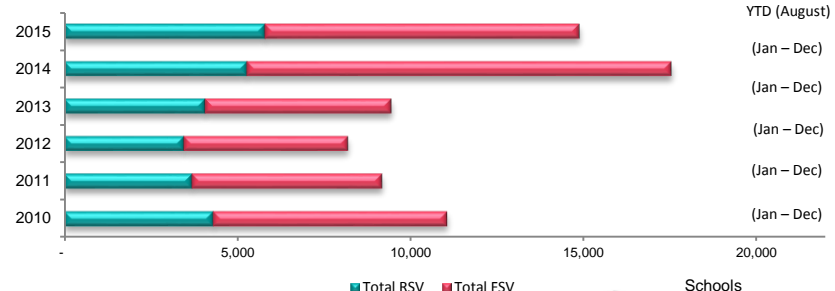
India: First time student visas issued by sector, August



India: Renewed student visas (RSV) 2012 - 2015



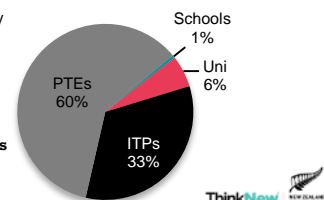
India: Cumulative total for RSV vs. FSV 2010 - 2015




Takeaways:

- Indian TSVs are tracking positively, up 23% (2,761) YTD.
- ITP FSVs continue to see strong growth, up 85% (1,392) YTD.

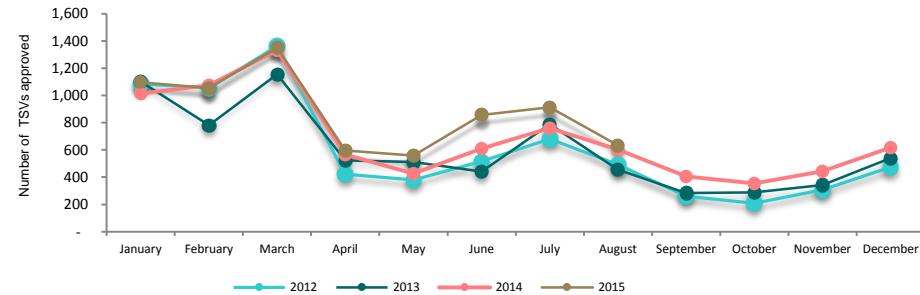
YTD 2015 sector breakdown of FSVs



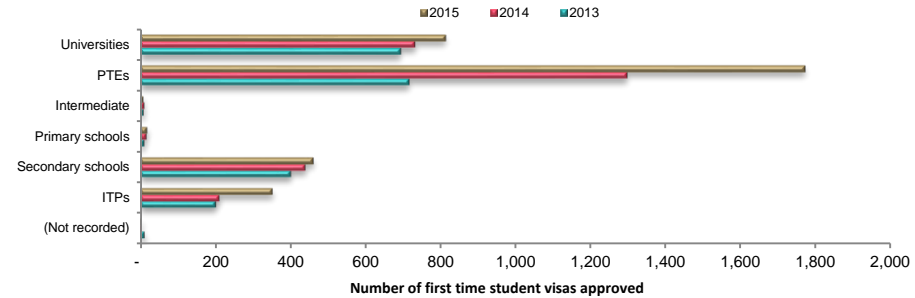
August RSV		August FSV		August TSV	
	-28		58		30
-8%		24%		5%	

YTD RSV		YTD FSV		YTD TSV	
	-48		718		670
-1%		26%		10%	

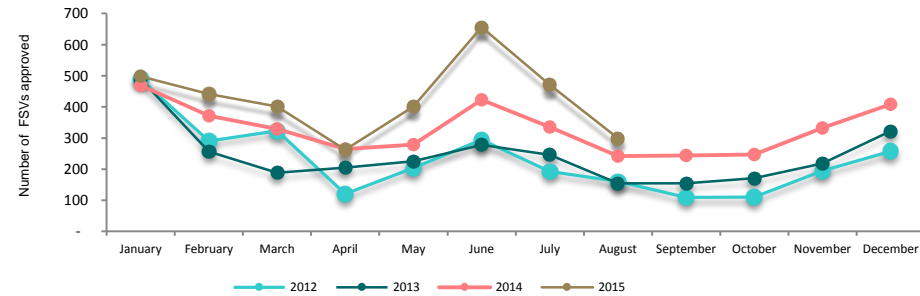
ASEAN: Total student visas (TSV) 2012 - 2015



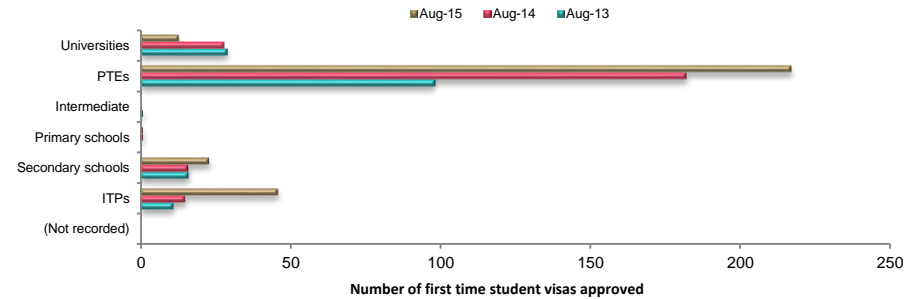
ASEAN: First time student visas issued by sector, YTD



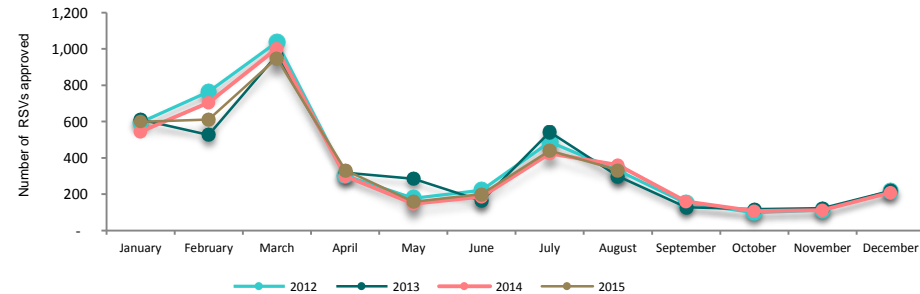
ASEAN: First time student visas (FSV) 2012 - 2015



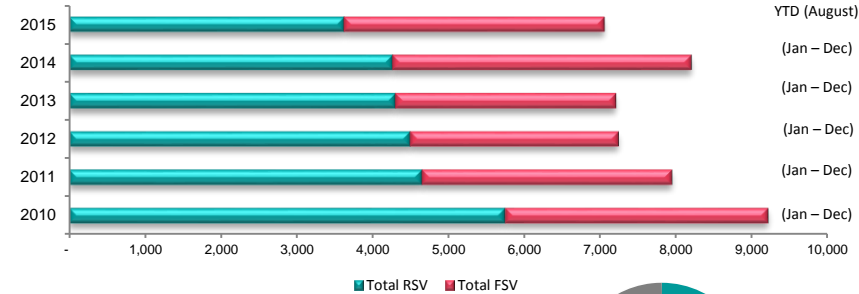
ASEAN: First time student visas issued by sector, August



ASEAN: Renewed student visas (RSV) 2012 - 2015



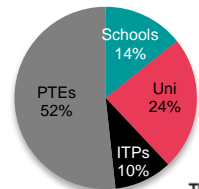
ASEAN: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:




- The ASEAN market experienced steady growth in 2015, with YTD TSVs up 10% (670).
- FSVs have seen strong growth, up 26% (718) YTD and 24% (58) in August.
- YTD this growth has been driven by an increase in Filipino PTE students.



**YTD 2015 sector
breakdown of FSVs**



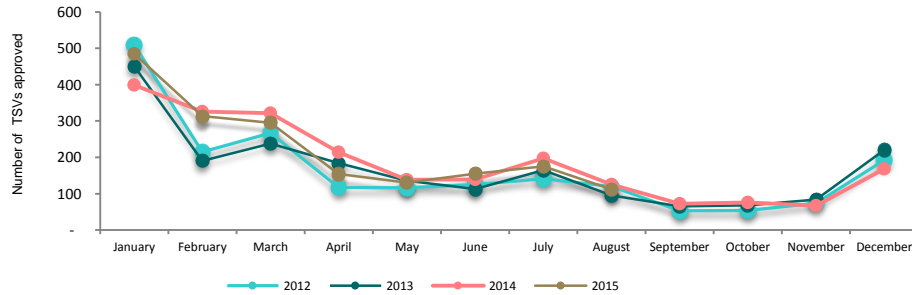
Thailand:

YTD (January to August)

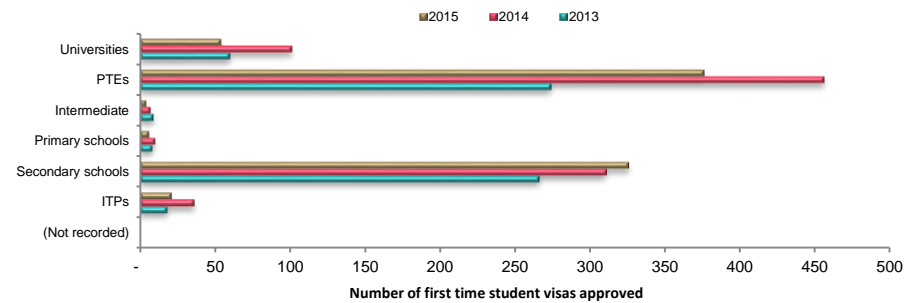
August RSV		August FSV		August TSV	
	-7		-6		-10%
	-10%		-11%		-10%

YTD RSV		YTD FSV		YTD TSV	
	93		-133		-2%
	10%		-14%		-2%

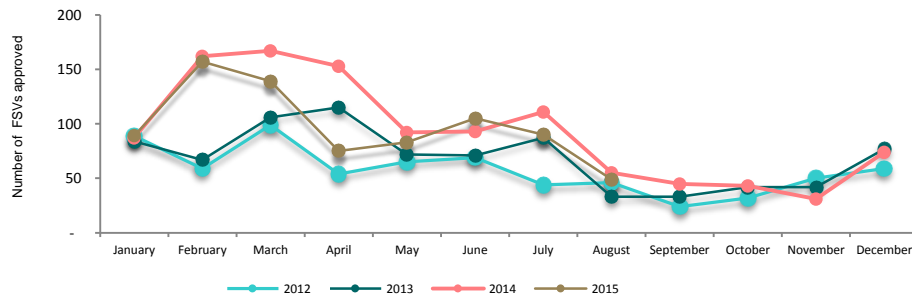
Thailand: Total student visas (TSV) 2012 - 2015



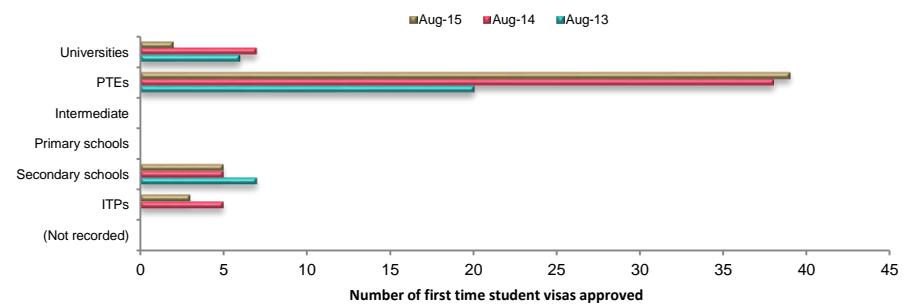
Thailand: First time student visas issued by sector, YTD



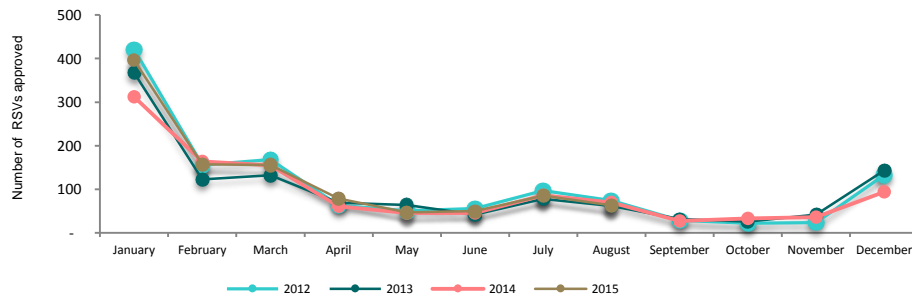
Thailand: First time student visas (FSV) 2012 - 2015



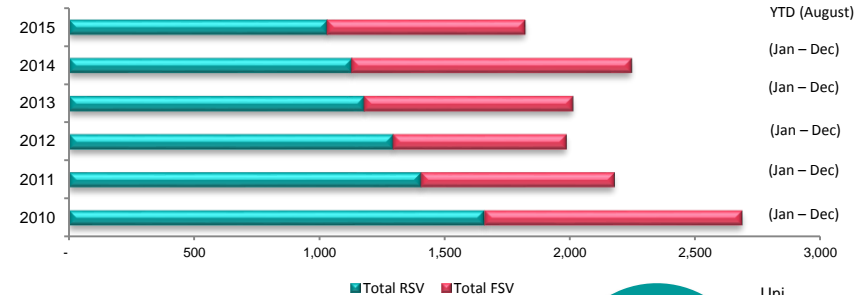
Thailand: First time student visas issued by sector, August



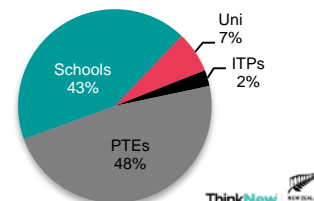
Thailand: Renewed student visas (RSV) 2012 - 2015



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



YTD 2015 sector
breakdown of FSVs



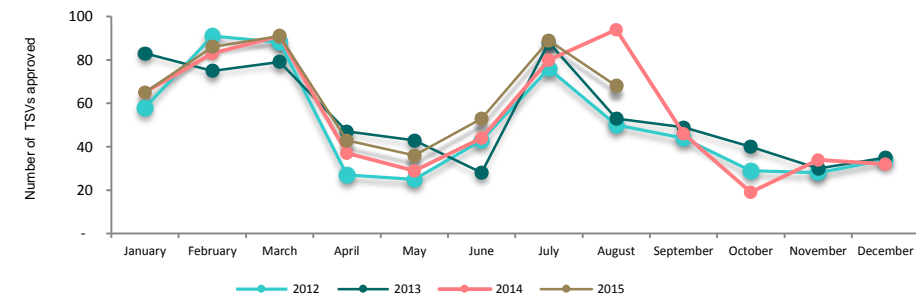
Takeaways:

- This market is tracking flat on 2014, down 2% (-40) in TSVs.
- The secondary school sector is the only market to experience growth in FSVs YTD, up 5% (16).
- All other sectors declined YTD.

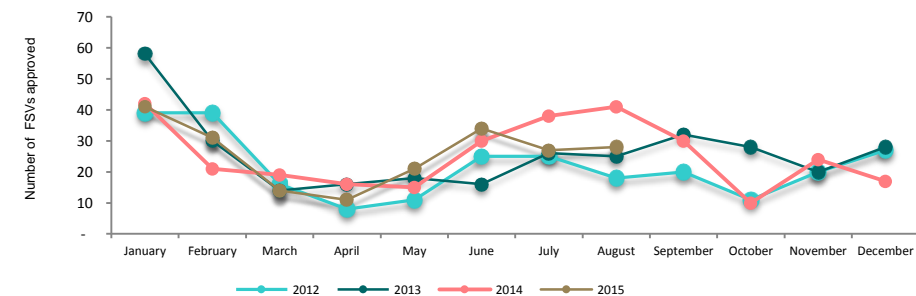
August RSV		August FSV		August TSV	
↓	-13	↓	-13	↓	-26
	-25%		-32%		-28%

YTD RSV		YTD FSV		YTD TSV	
↑	23	↓	-15	↑	8
	8%		-7%		2%

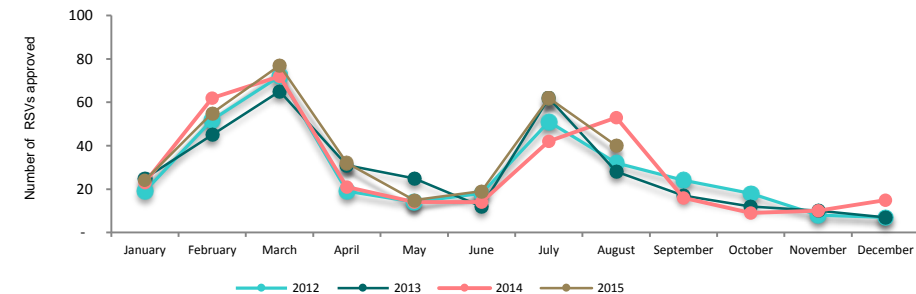
Indonesia: Total student visas (TSV) 2012 - 2015



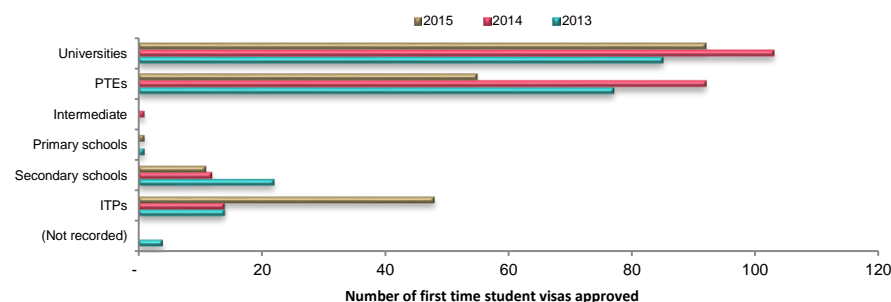
Indonesia: First time student visas (FSV) 2012 - 2015



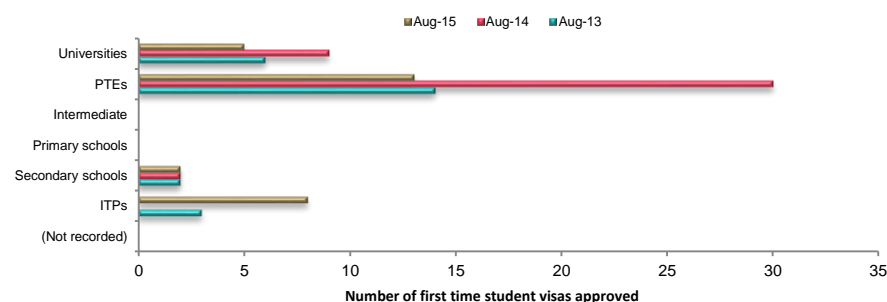
Indonesia: Renewed student visas (RSV) 2012 - 2015



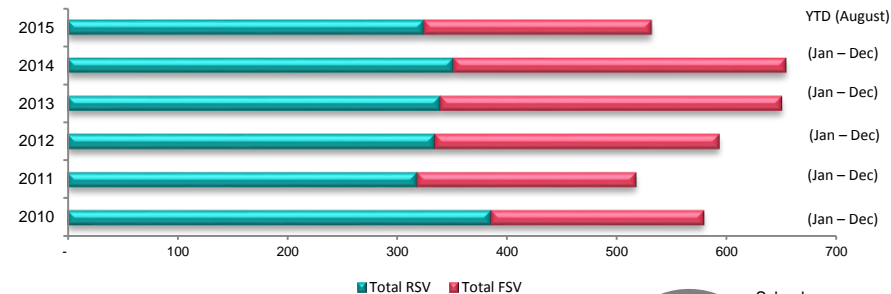
Indonesia: First time student visas issued by sector, YTD



Indonesia: First time student visas issued by sector, August



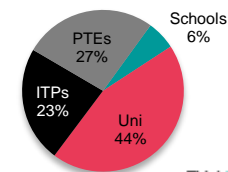
Indonesia: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

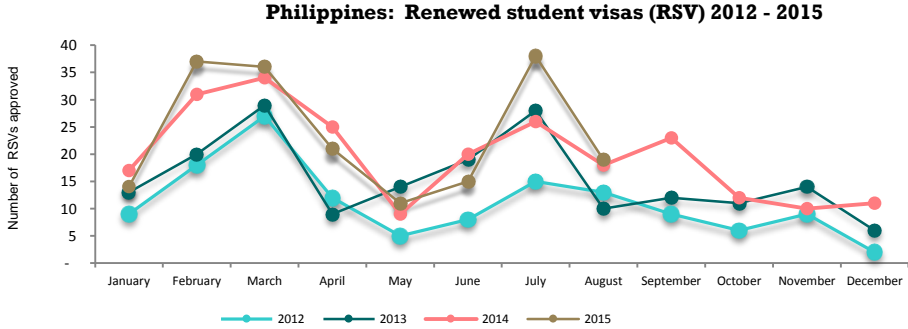
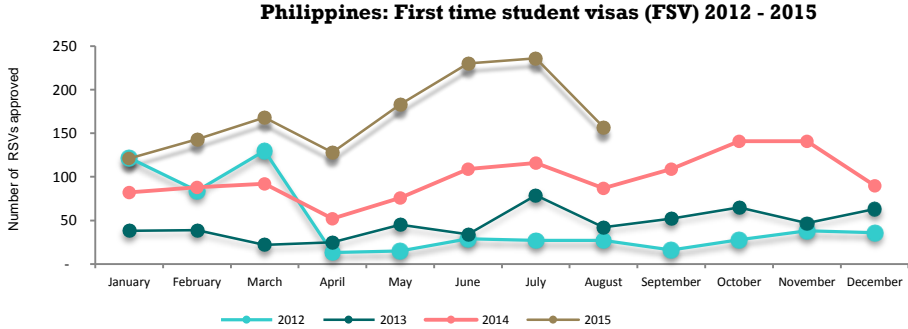
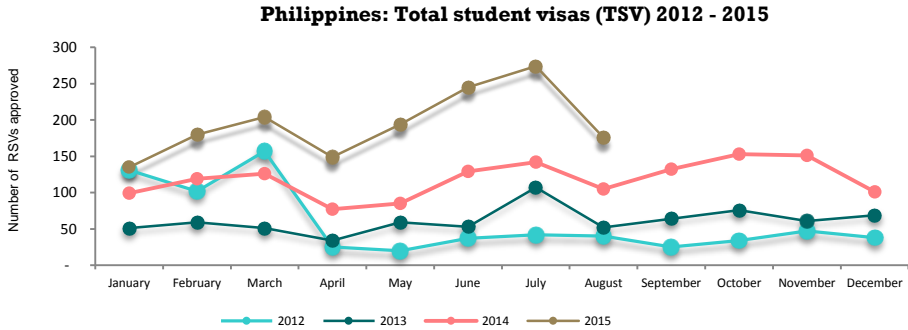
- Overall this market is tracking flat, up 2% (8) in TSVs YTD.
- ITPs have shown strong YTD growth in FSVs, up 243% (34); however, this gain has been offset by a decline in PTE FSVs, down 40% (-37) YTD.

YTD 2015 sector breakdown of FSVs



Philippines

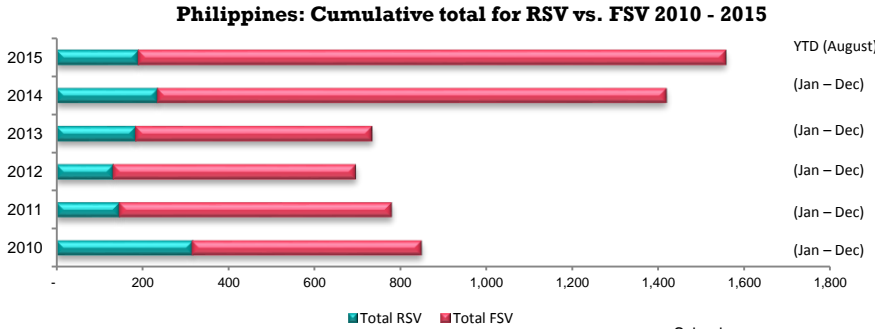
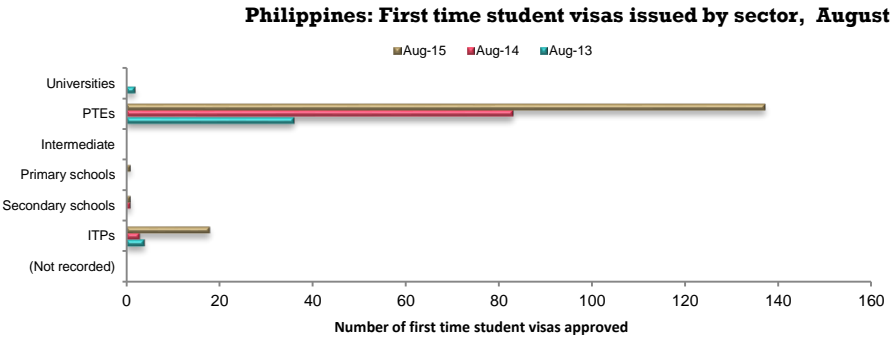
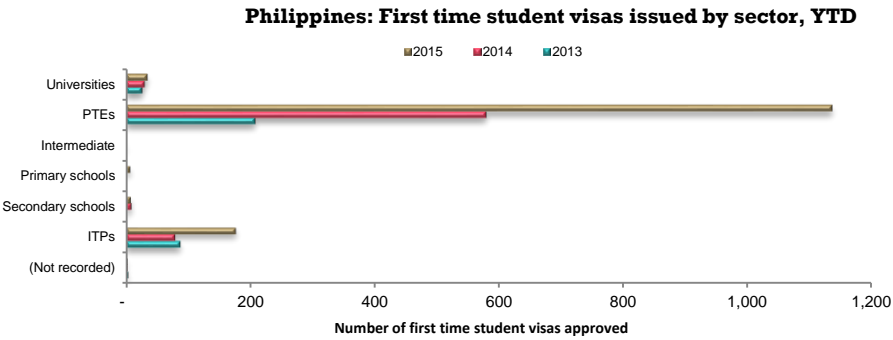
August RSV			August FSV			August TSV		
↑	1	6%	↑	70	80%	↑	71	68%



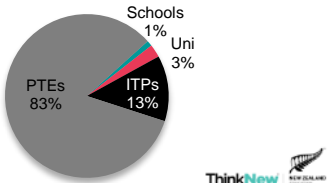
- Takeaways:
- This market grew significantly in 2014 and has continued to see strong growth in 2015.
 - The PTE and ITP sectors have experienced the strongest growth, up 96% and 124% YTD.

YTD (January to August)




YTD RSV			YTD FSV			YTD TSV		
↑	11	6%	↑	664	95%	↑	675	77%



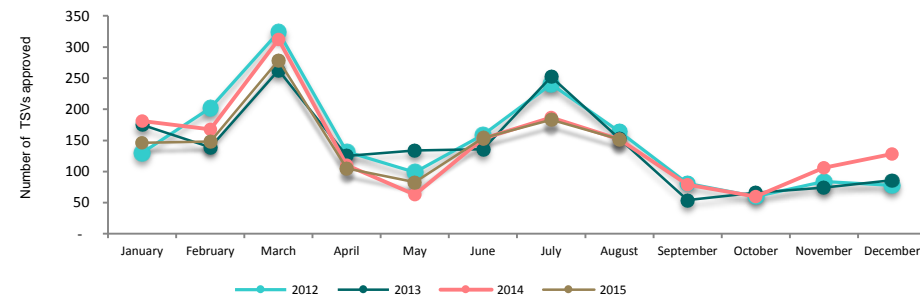
YTD 2015 sector breakdown of FSVs



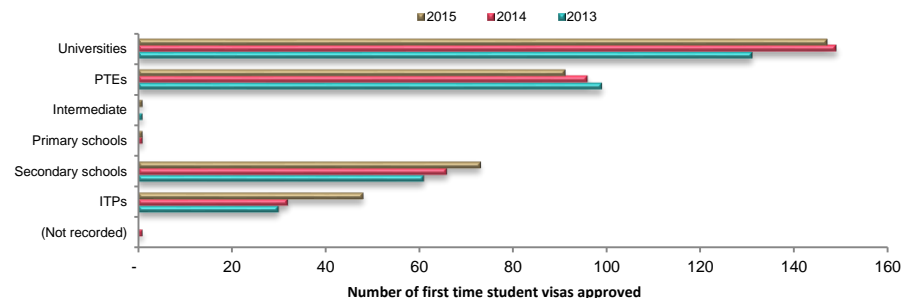
August RSV			August FSV		August TSV			
↓	-8	-7%	↑	8	25%	→	0	0%

YTD RSV			YTD FSV		YTD TSV			
	-92	-9%		16	5%		-76	-6%

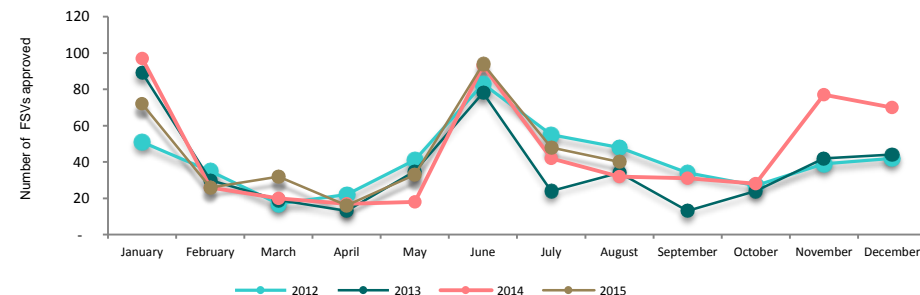
Viet Nam: Total student visas (TSV) 2012 - 2015



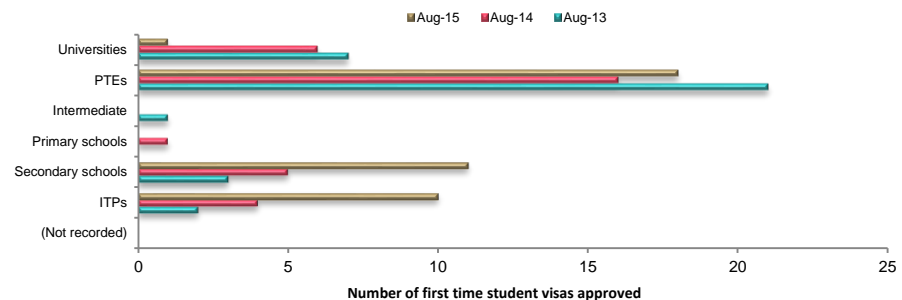
Viet Nam: First time student visas issued by sector, YTD



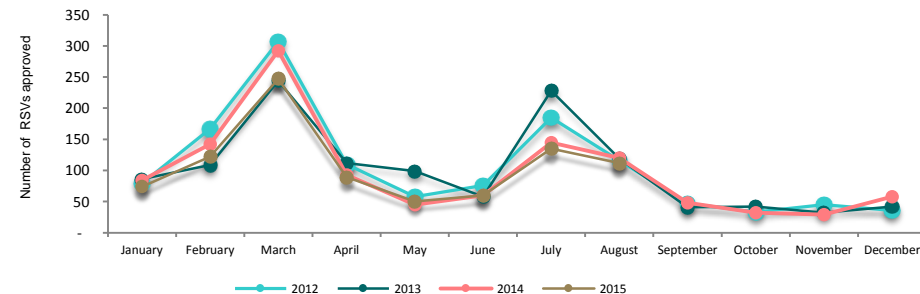
Viet Nam: First time student visas (FSV) 2012 - 2015



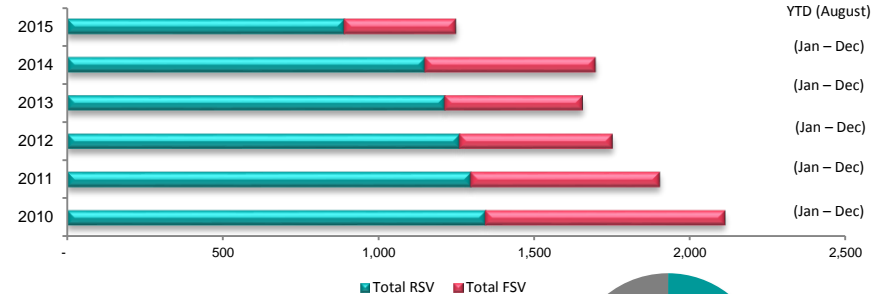
Viet Nam: First time student visas issued by sector, August



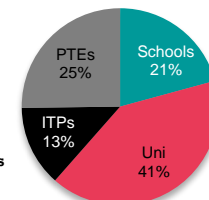
Viet Nam: Renewed student visas (RSV) 2012 - 2015



Viet Nam: Cumulative total for RSV vs. FSV 2010 - 2015



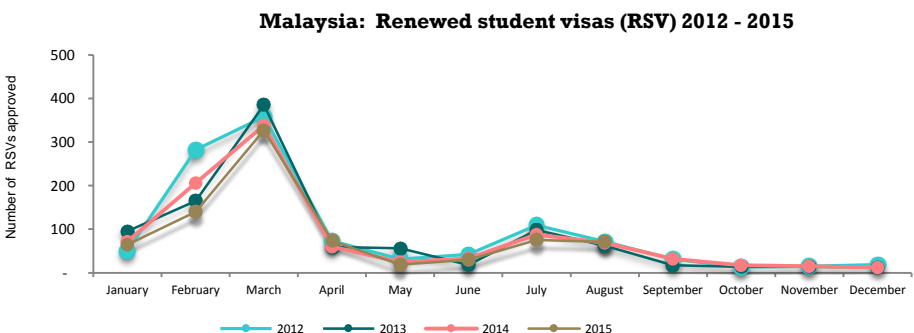
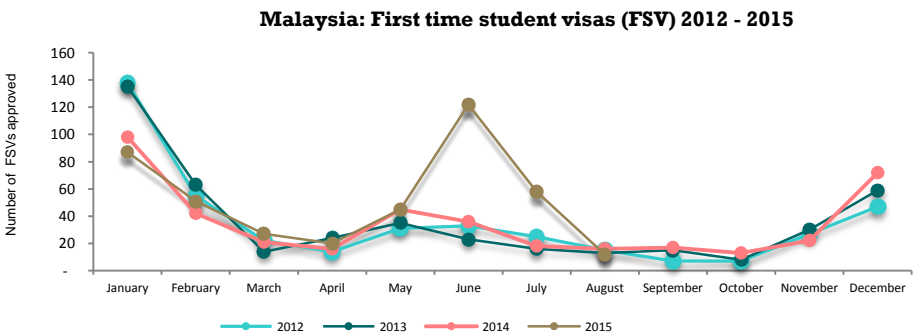
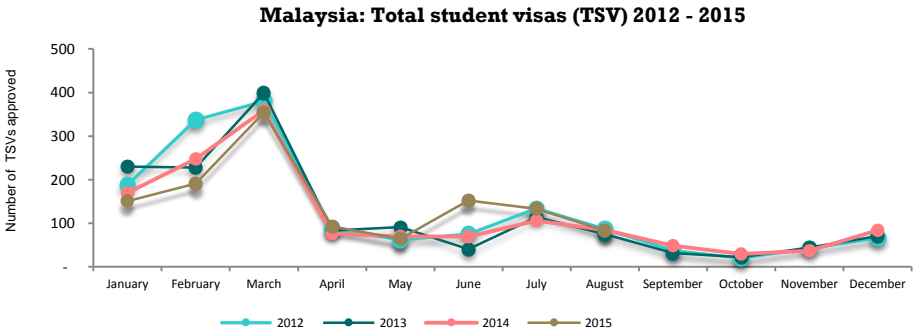
YTD 2015 sector breakdown of FSVs



Takeaways:

- Viet Nam has experienced a 6% (-76) decline in TSVs YTD.
- Whilst FSVs are up 5% (16) YTD, RSVs have declined by 9% (-92).
- Reports from the market indicate that there has been a steady increase in students that have a higher risk profile for Immigration NZ. This is leading to higher declines and lower student numbers approved. ENZ is working with INZ to better understand this issue.

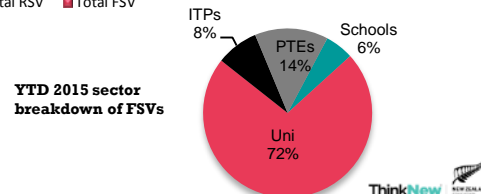
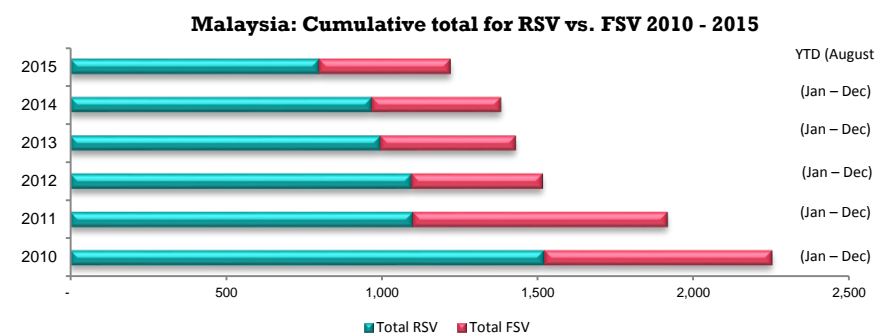
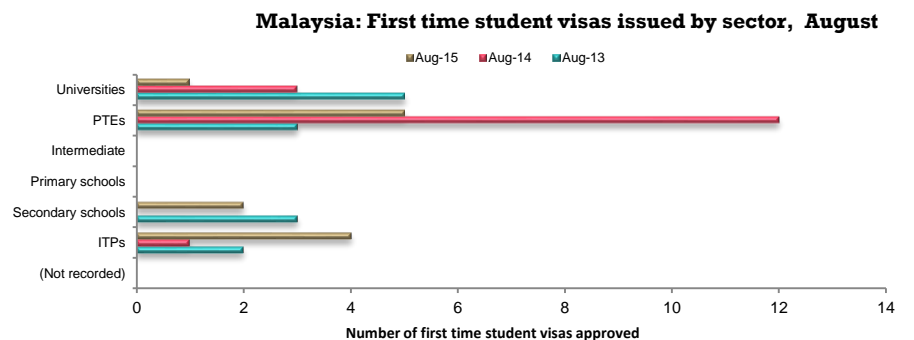
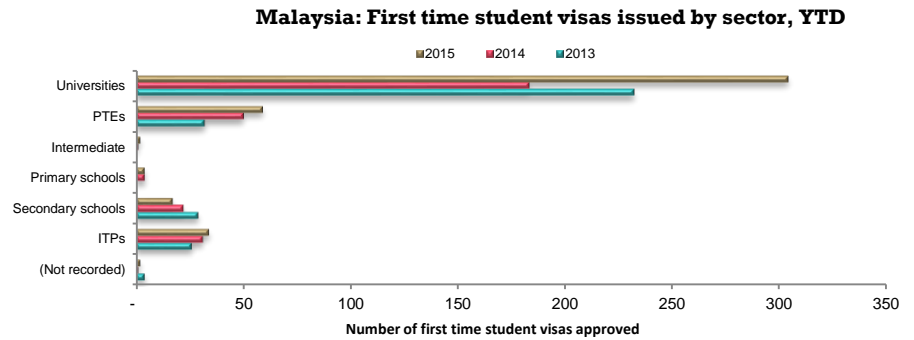
August RSV			August FSV			August TSV		
↑	2	3%	↓	-4	-25%	↓	-2	-2%



- Takeaways:
- This market has tracked relatively flat in TSVs throughout 2015, but has shown strong growth in FSVs, up 45% YTD.
 - The university sector has experienced growth in FSVs, up 45% (121) YTD, driven by scholarship students.

YTD (January to August)

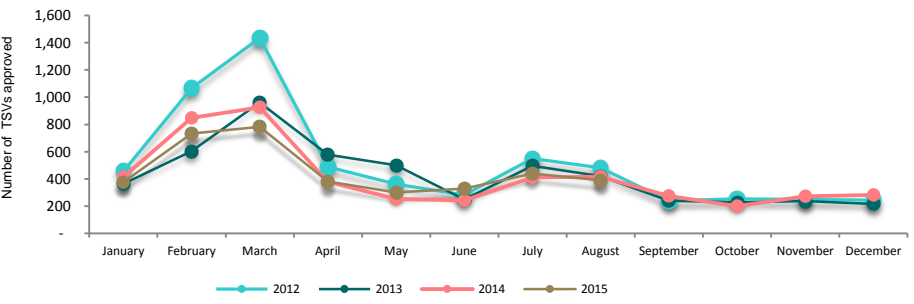
YTD RSV			YTD FSV			YTD TSV		
↓	-92	-10%	↑	130	45%	↑	38	3%



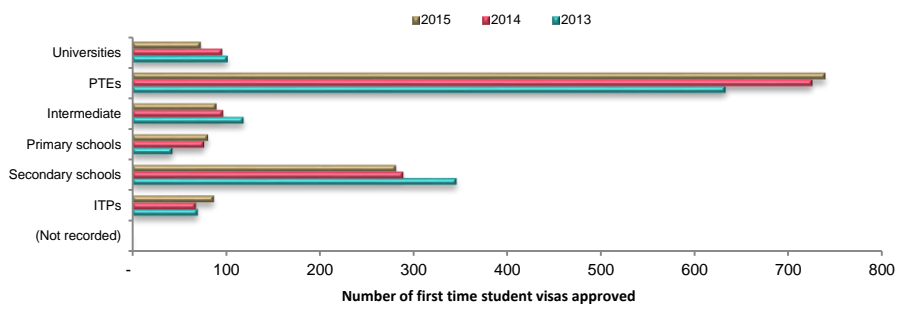
August RSV		August FSV		August TSV	
↓	-34	↑	7	↓	-27
	-12%		5%		-6%

YTD RSV		YTD FSV		YTD TSV	
↓	-158	↓	-2	↓	-160
	-6%		0%		-4%

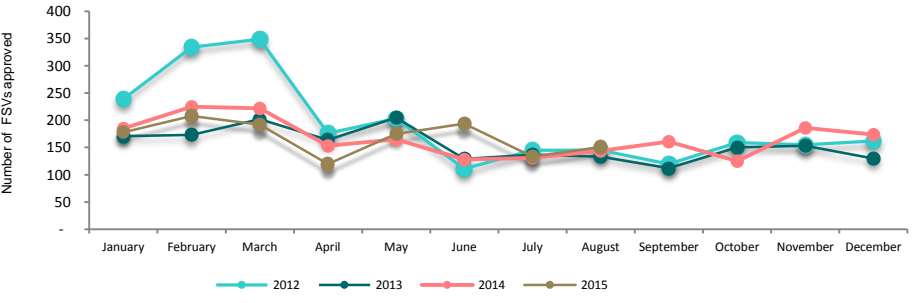
Korea: Total student visas (TSV) 2012 - 2015



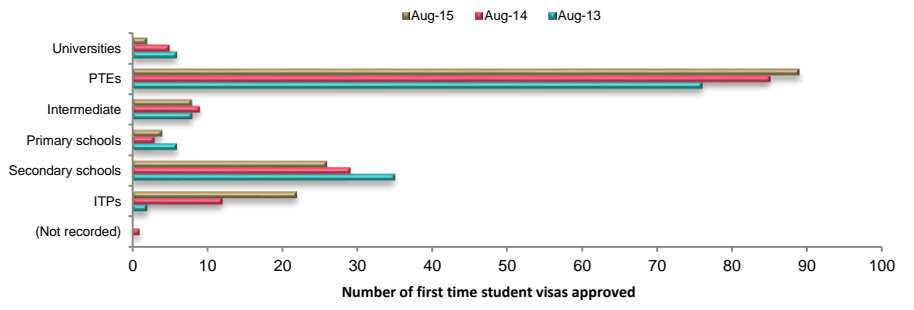
Korea: First time student visas issued by sector, YTD



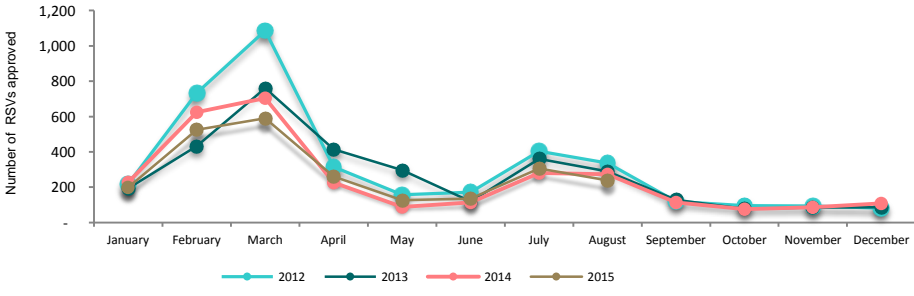
Korea: First time student visas (FSV) 2012 - 2015



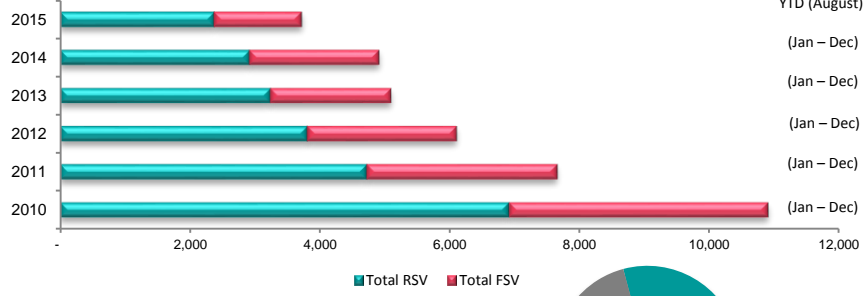
Korea: First time student visas issued by sector, August



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



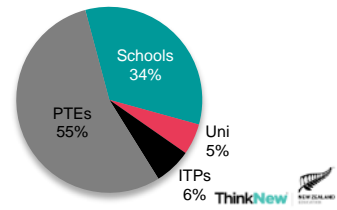
Korea: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market's YTD TSVs are down 4% (-160).
- During August, Korean ITP FSVs have increased by 83% (10), and YTD Korean ITP FSVs have increased by 28%.

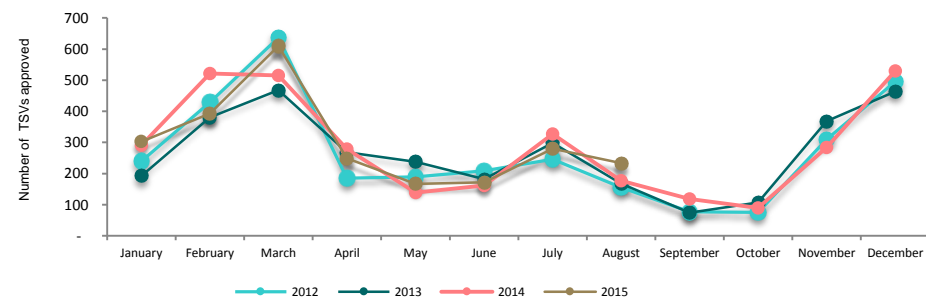
YTD 2015 sector breakdown of FSVs



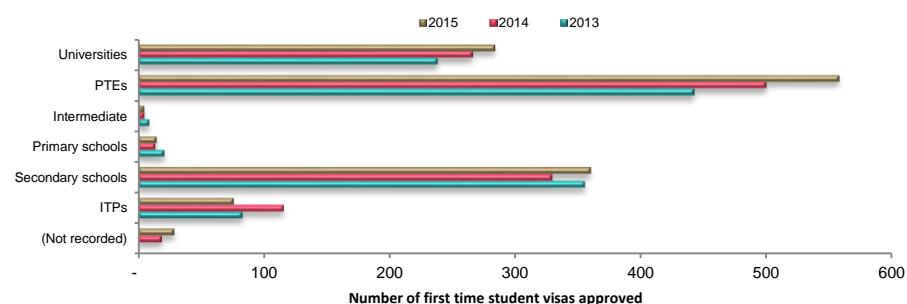
August RSV		August FSV		August TSV	
↓	-13	↑	70	↑	57
	-16%		74%		32%

YTD RSV		YTD FSV		YTD TSV	
↓	-81	↑	78	↓	-3
	-7%		6%		0%

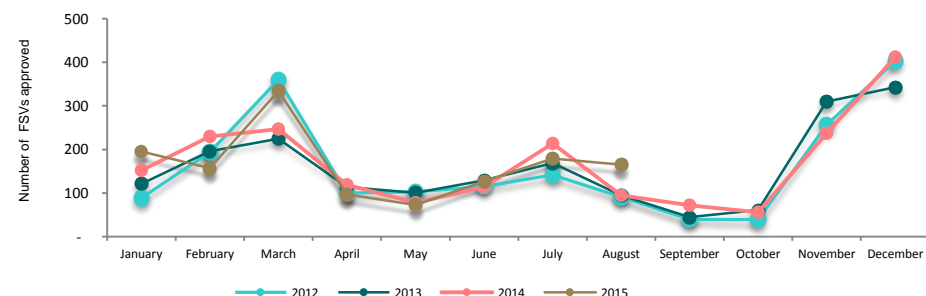
Japan: Total student visas (TSV) 2012 - 2015



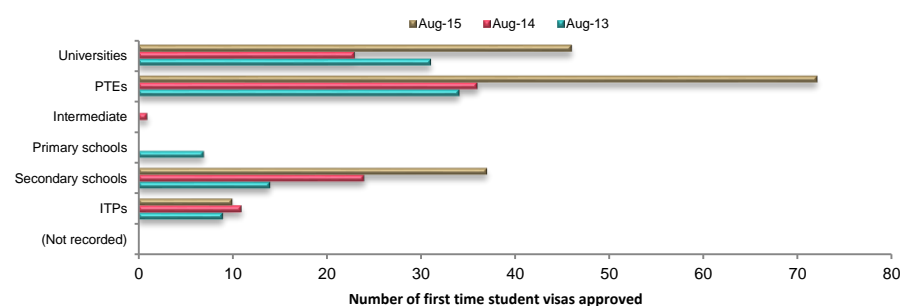
Japan: First time student visas issued by sector, YTD



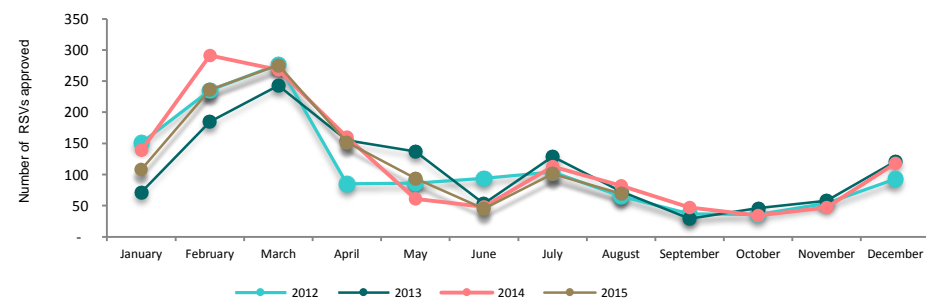
Japan: First time student visas (FSV) 2012 - 2015



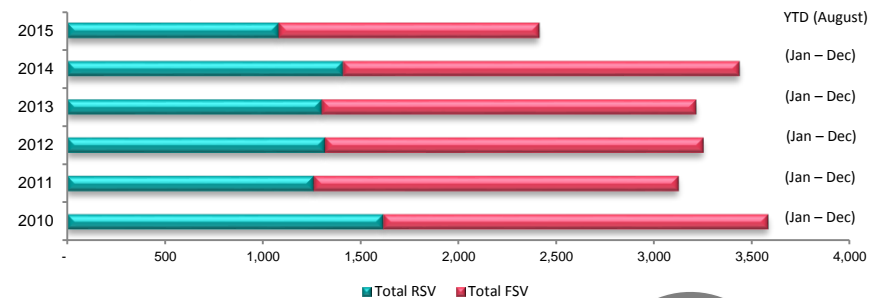
Japan: First time student visas issued by sector, August



Japan: Renewed student visas (RSV) 2012 - 2015



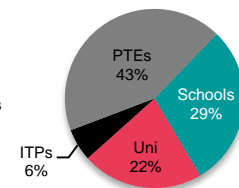
Japan: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- Japan's TSVs have continued to track relatively flat YTD with a 0% (-3) change.
- August saw FSVs increase strongly, up 74% (70), driven by growth in PTEs, universities, and secondary schools.

YTD 2015 sector breakdown of FSVs



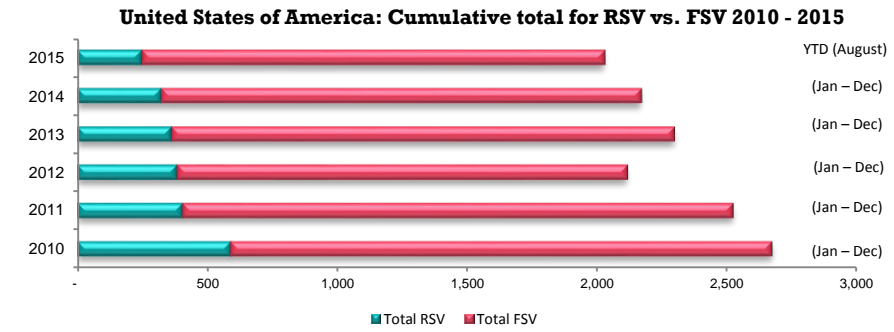
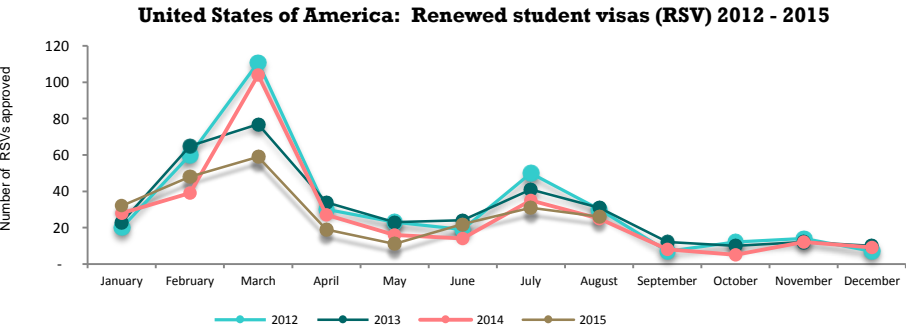
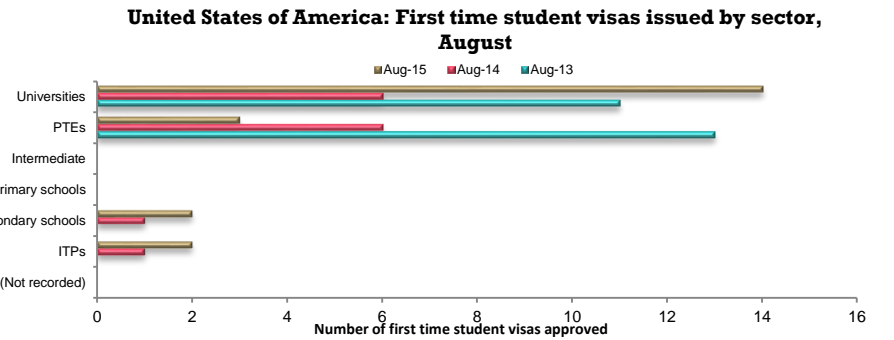
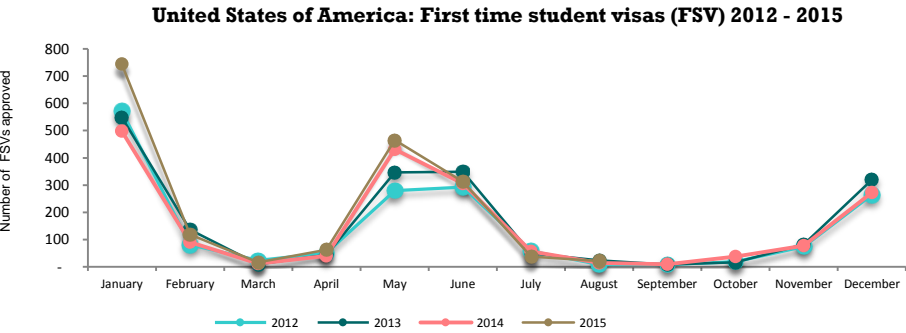
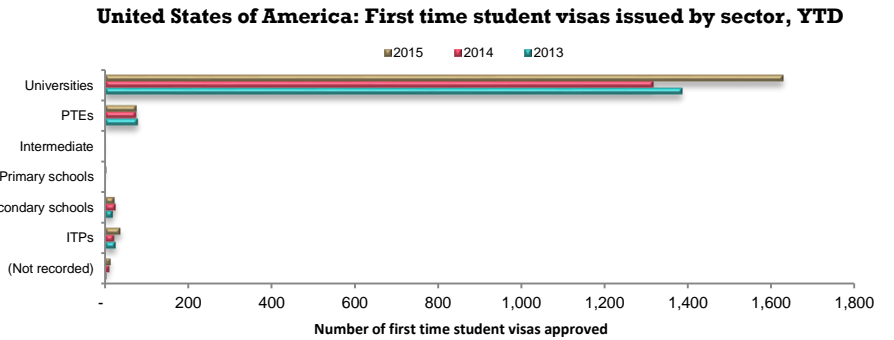
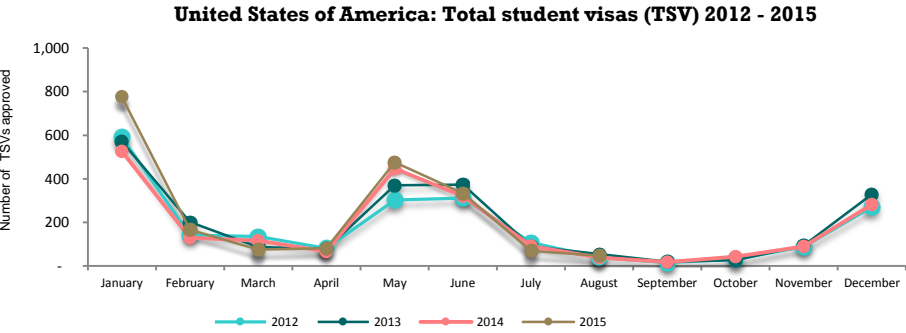
United States of America:



YTD (January to August)

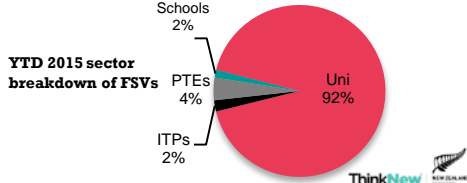
August RSV		August FSV		August TSV	
↑	1	4%	↑	7	50%
			↑	8	21%

YTD RSV		YTD FSV		YTD TSV	
↓	-40	-14%	↑	331	23%
			↑	291	17%



Takeaways:

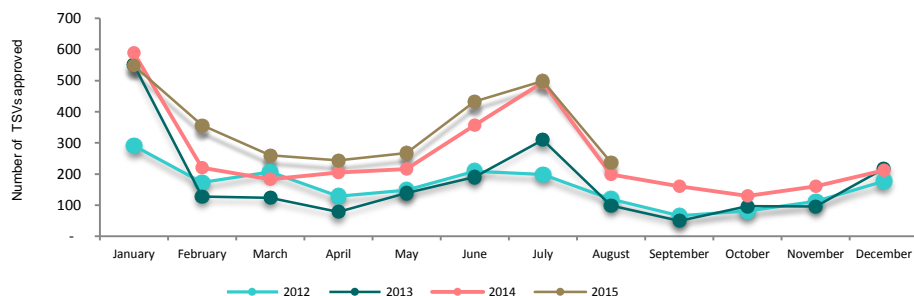
- TSVs continue to show strong growth YTD, up 17% (291). This growth has been driven by FSVs, up 23% (331) YTD.



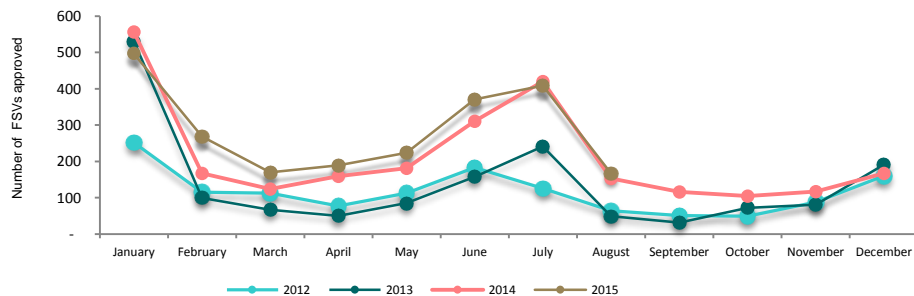
Latin America:

August RSV			August FSV			August TSV		
↑	26	58%	↑	14	9%	↑	40	20%

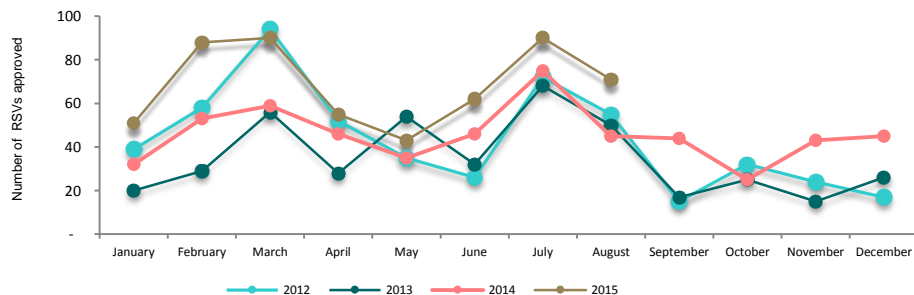
Latin America: Total student visas (TSV) 2012 - 2015



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



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



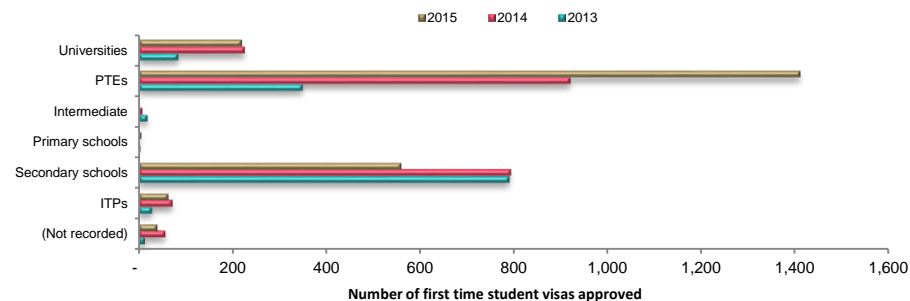
Takeaways:

- This market has experienced growth in TSVs and FSVs during 2015, up 16% (383) and 11% (224) respectively.
- Secondary schools have shown a strong decline YTD, down 30% (-234). This decline is driven by a decrease in the number of Chilean secondary school scholarship students.

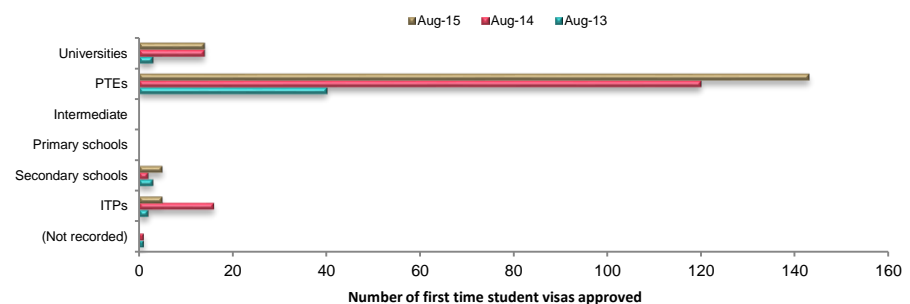
YTD (January to August)

YTD RSV			YTD FSV			YTD TSV		
↑	159	41%	↑	224	11%	↑	383	16%

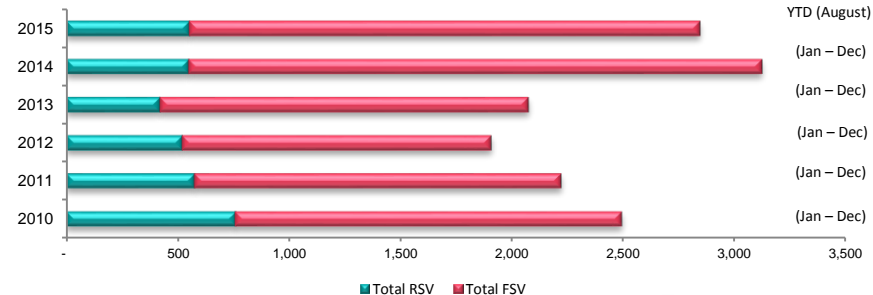
Latin America: First time student visas issued by sector, YTD



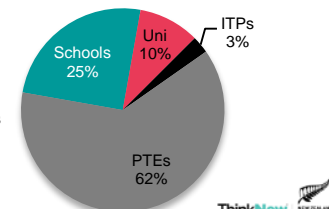
Latin America: First time student visas issued by sector, August



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



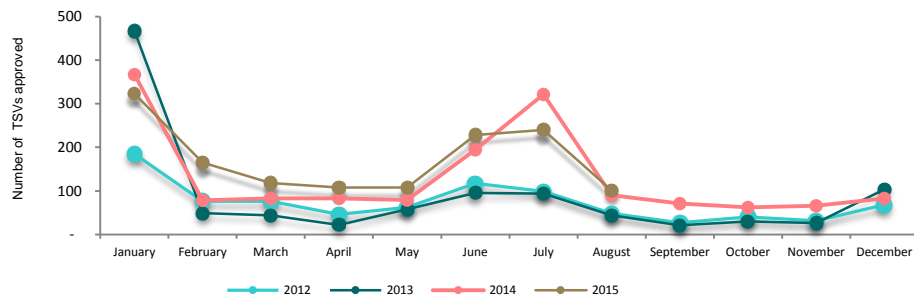
YTD 2015 sector breakdown of FSVs



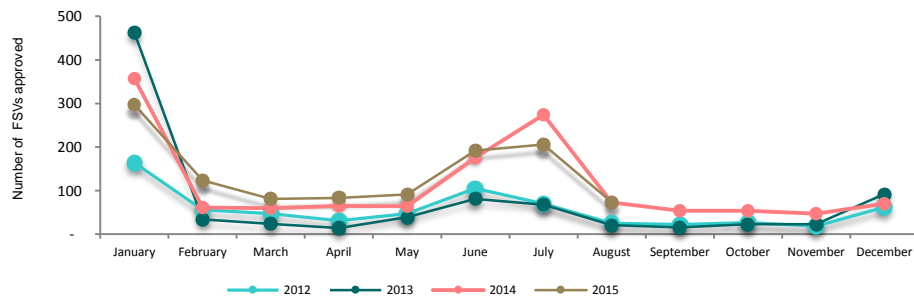
August RSV			August FSV			August TSV		
↑	10	59%	↑	1	1%	↑	11	12%

YTD RSV			YTD FSV			YTD TSV		
↑	78	47%	↑	18	2%	↑	96	7%

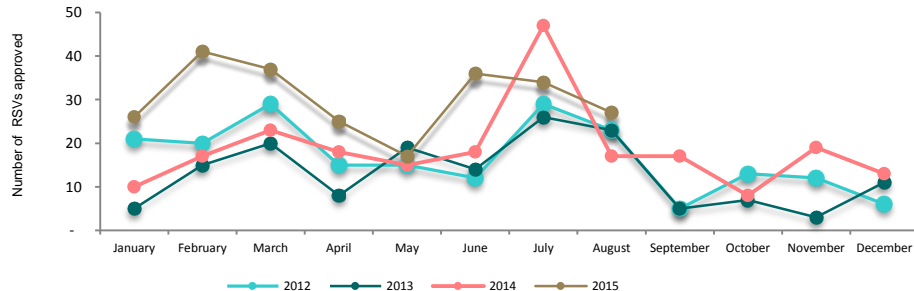
Brazil: Total student visas (TSV) 2012 - 2015



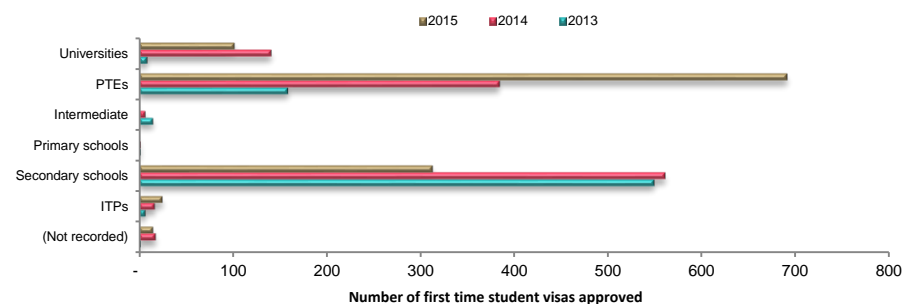
Brazil: First time student visas (FSV) 2012 - 2015



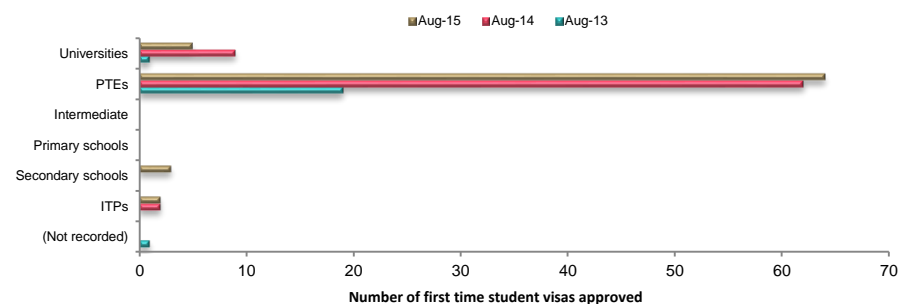
Brazil: Renewed student visas (RSV) 2012 - 2015



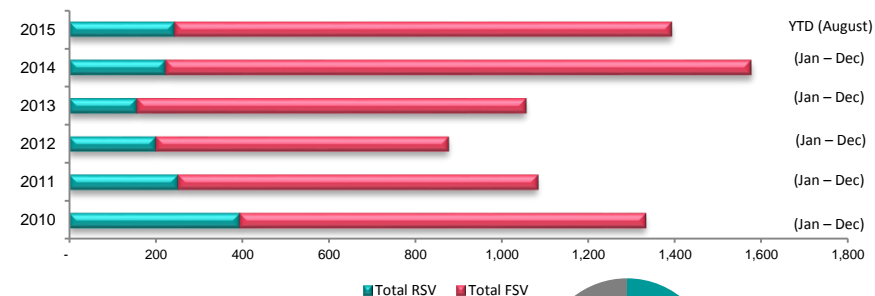
Brazil: First time student visas issued by sector, YTD



Brazil: First time student visas issued by sector, August



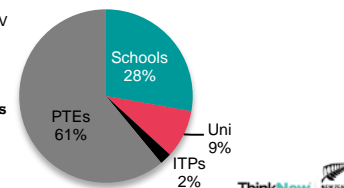
Brazil: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- The PTE sector has shown strong growth YTD, up 80% (307). In contrast the secondary school sector is down 44% (-248) YTD. This is driven by a reduction in the number of Pernambuco students arriving in July 2015, compared to July 2014.

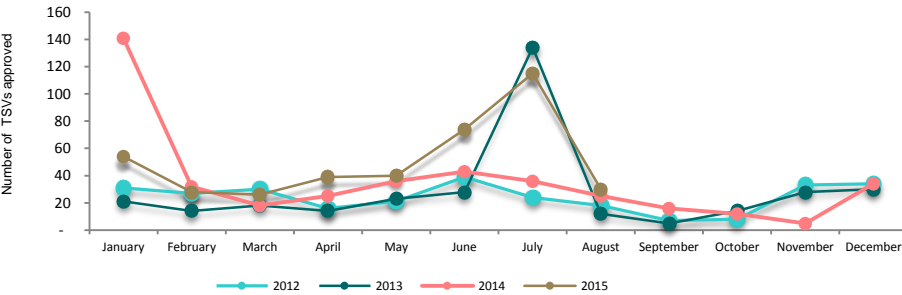
YTD 2015 sector breakdown of FSVs



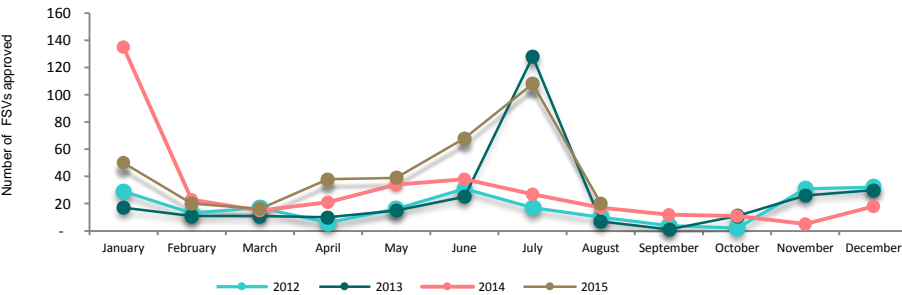
August RSV			August FSV			August TSV		
↑	2	25%	↑	3	18%	↑	5	20%

YTD RSV			YTD FSV			YTD TSV		
↑	1	2%	↑	49	16%	↑	50	14%

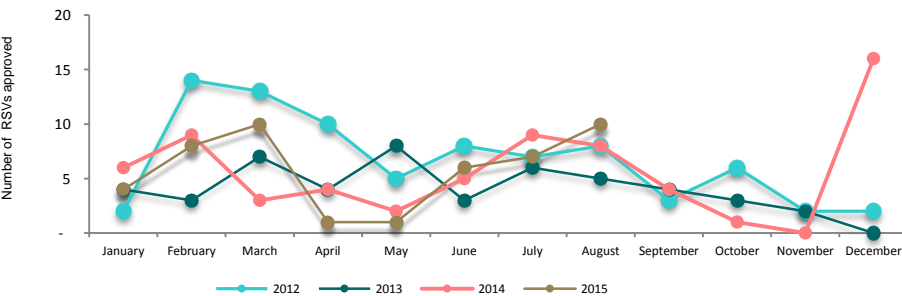
Chile: Total student visas (TSV) 2012 - 2015



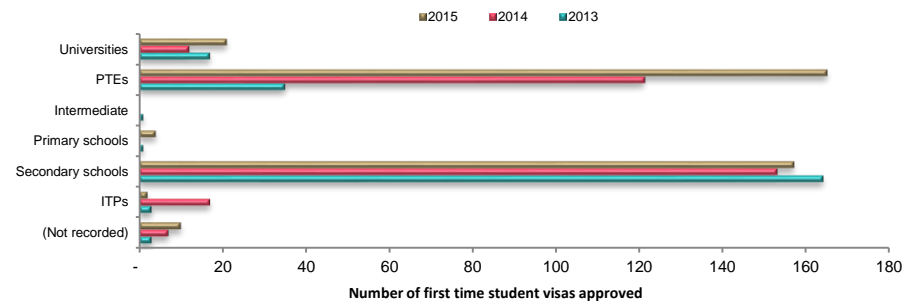
Chile: First time student visas (FSV) 2012 - 2015



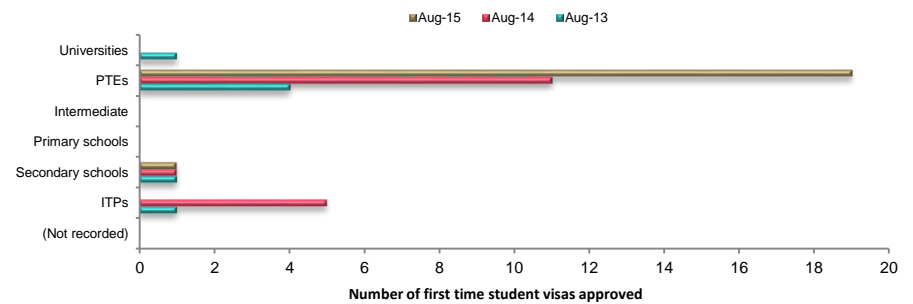
Chile: Renewed student visas (RSV) 2012 - 2015



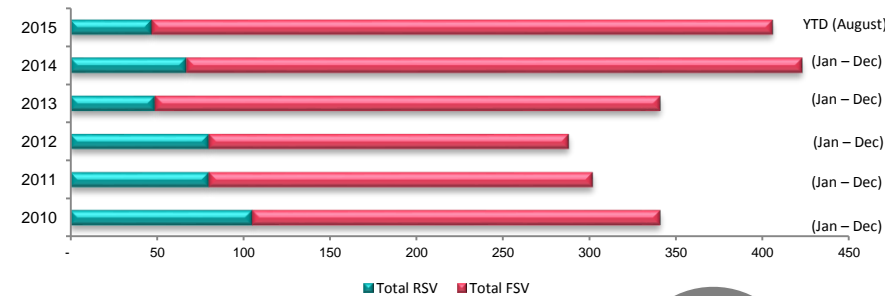
Chile: First time student visas issued by sector, YTD



Chile: First time student visas issued by sector, August



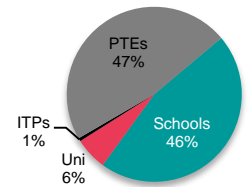
Chile: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

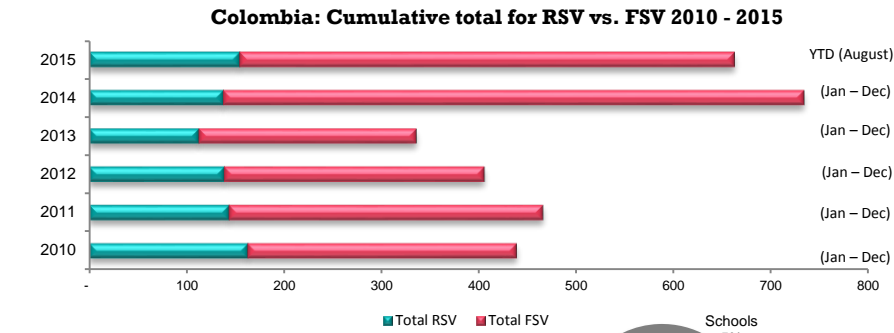
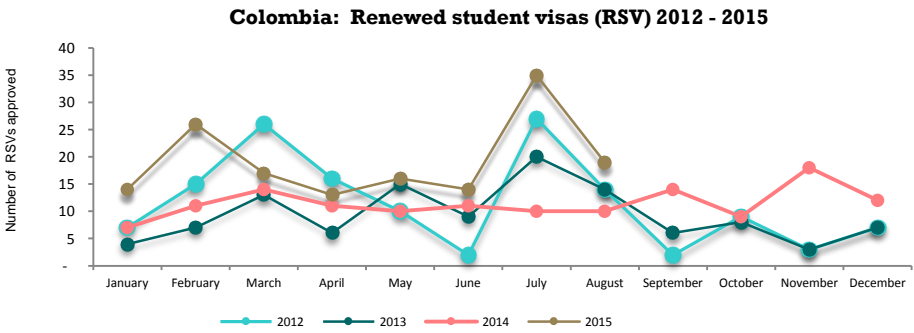
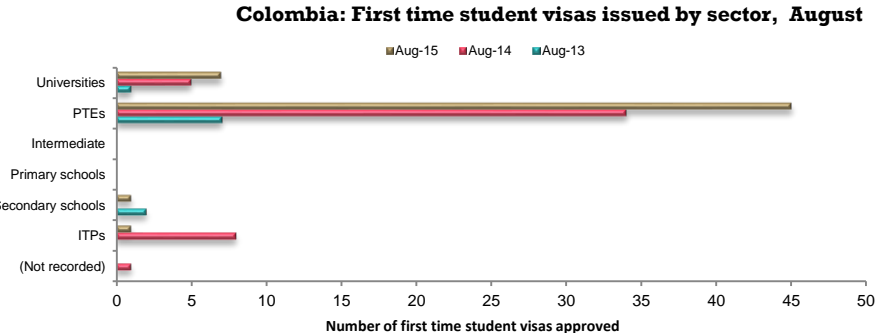
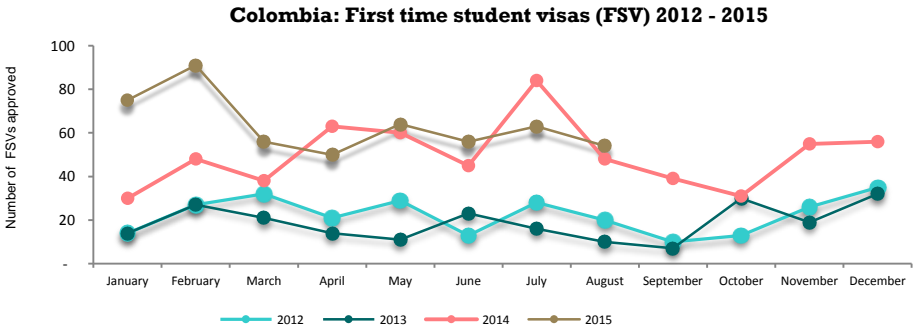
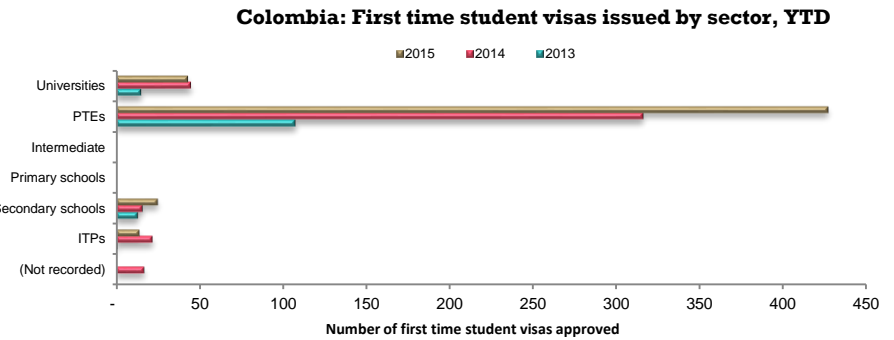
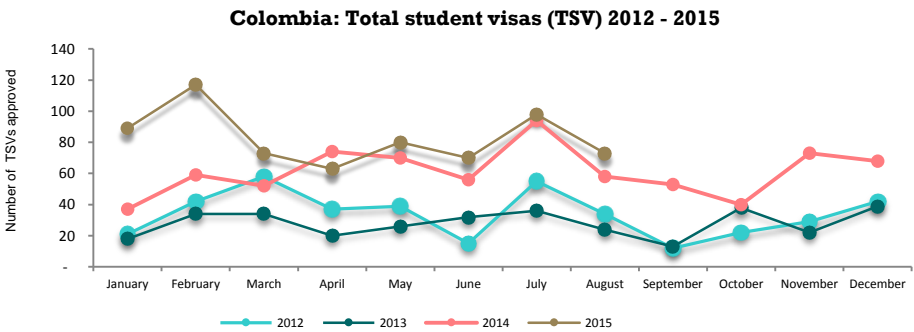
- This market has experienced a growth in TSV approvals year to date, up 14% (50). This growth has been driven by an increase in FSVs, up 16% (49).
- This growth has been primarily driven by the PTE sector, up 36% (44).

YTD 2015 sector breakdown of FSVs



August RSV			August FSV		August TSV	
↑	9	90%	↑	6 13%	↑	15 26%

YTD RSV			YTD FSV		YTD TSV			
↑	70	83%	↑	93	22%	↑	163	33%



Takeaways:

- This market has experienced significant growth in TSVs, up 33% (163) YTD.
- The PTE sector drove growth, up 35% (111) YTD.

YTD 2015 sector breakdown of FSVs

Sector	Percentage
PTEs	84%
Schools	5%
Uni	8%
ITPs	3%

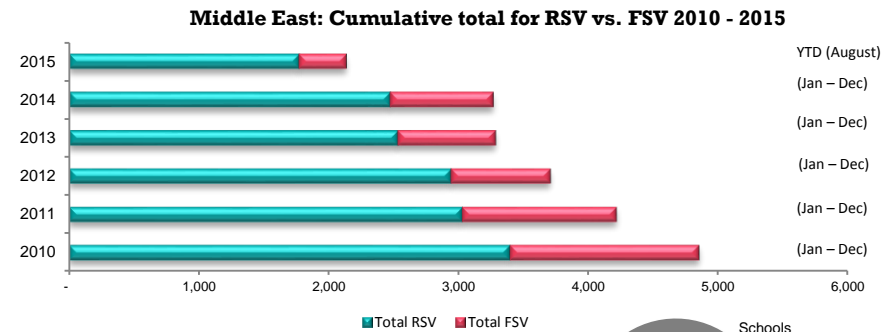
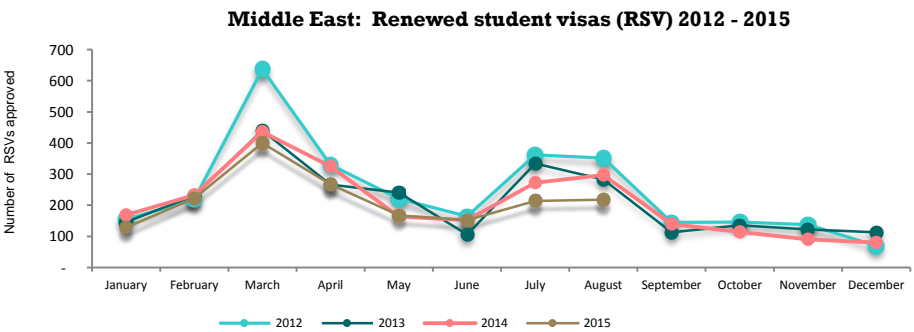
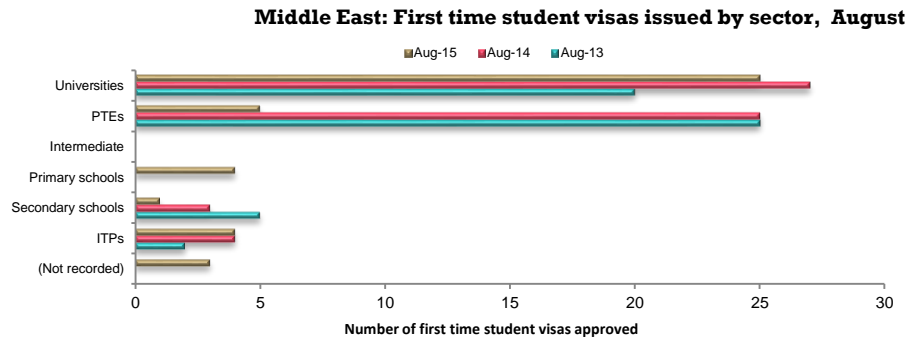
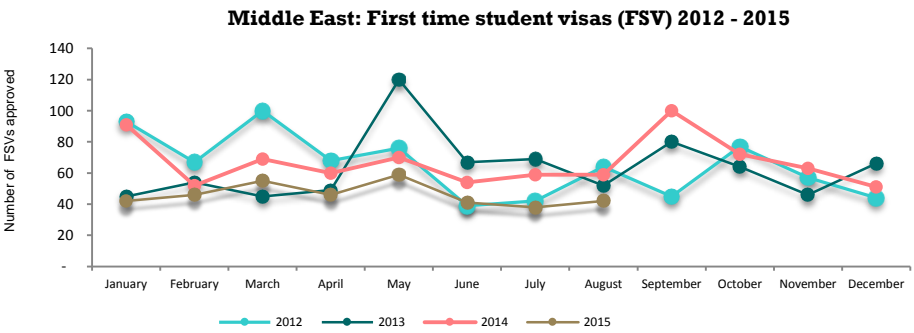
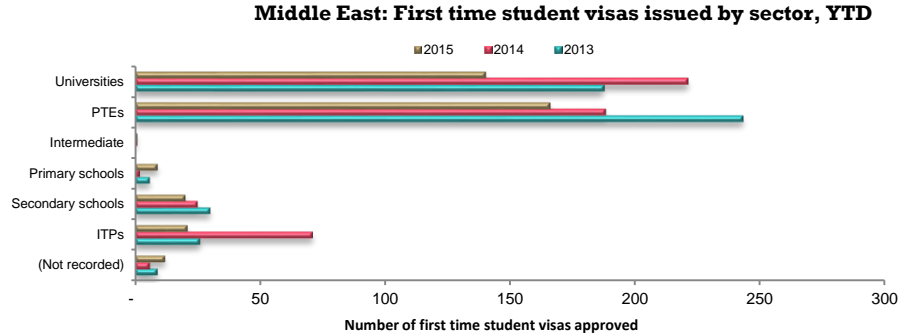
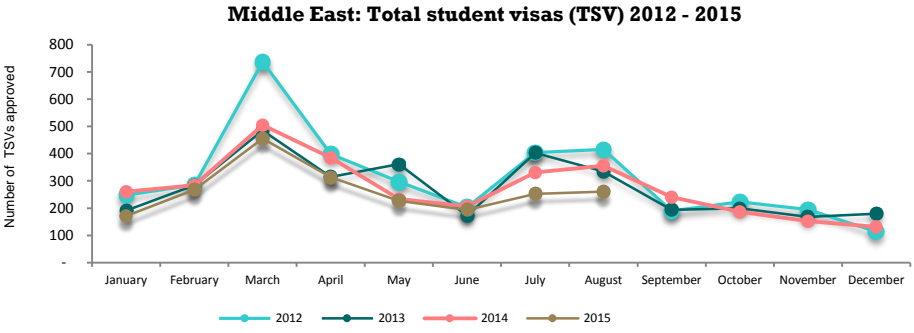


Middle East:

YTD (January to August)

August RSV		August FSV		August TSV	
↓ -79	-27%	↓ -17	-29%	↓ -96	-27%

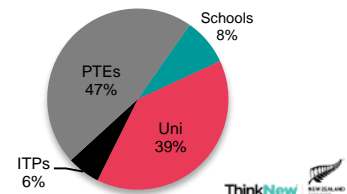
YTD RSV		YTD FSV		YTD TSV	
↓ -276	-13%	↓ -145	-28%	↓ -421	-16%



Takeaways:

- This market continues to experience negative results.

YTD 2015 sector breakdown of FSVs



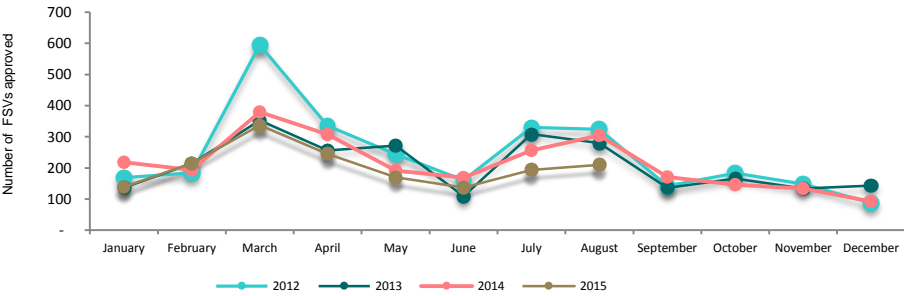
Saudi Arabia:

YTD (January to August)

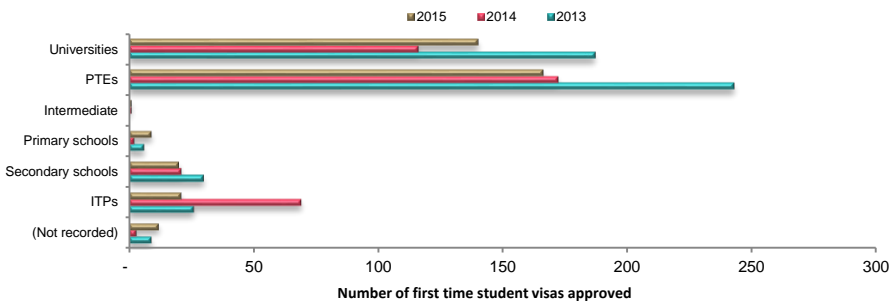
August RSV		August FSV		August TSV	
↓	-69	↓	-27%	↓	-26
			-54%		-95
					-31%

YTD RSV		YTD FSV		YTD TSV	
↓ -234	-14%	↓ -140	-36%	↓ -374	-19%

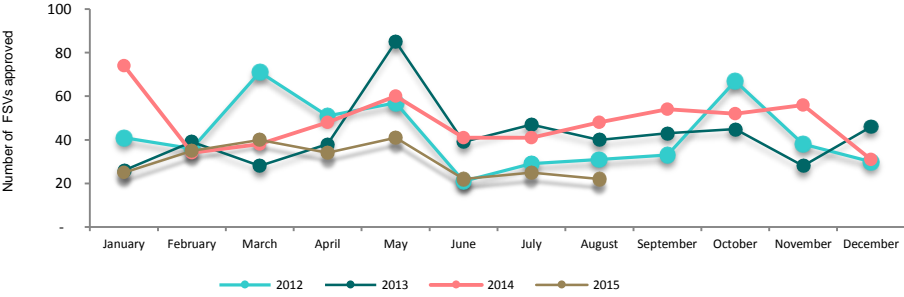
Saudi Arabia: Total student visas approved 2012 - 2015 (TSV)



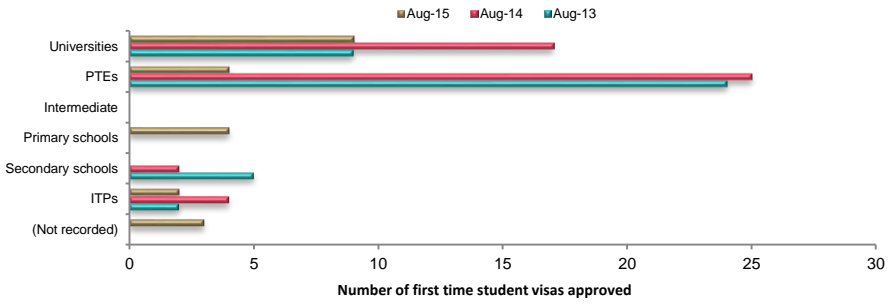
Saudi Arabia: First time student visas issued by sector, YTD



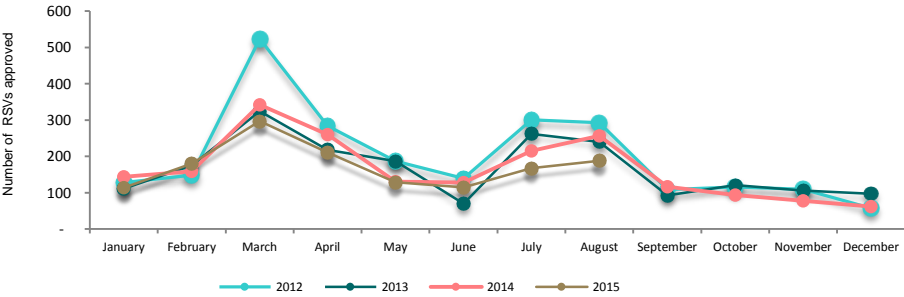
Saudi Arabia: Total first time student visas approved (FSV) 2012 - 2015



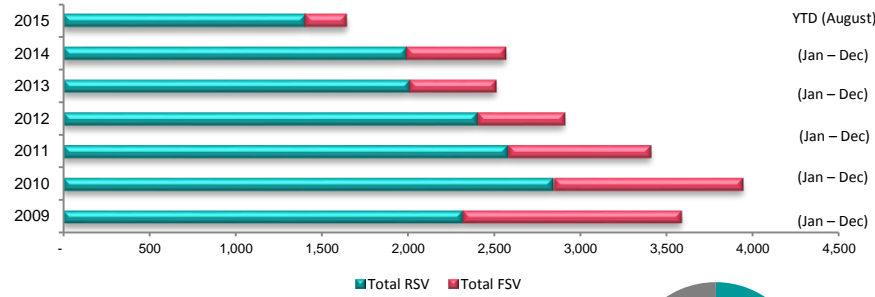
Saudi Arabia: First time student visas issued by sector, August



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

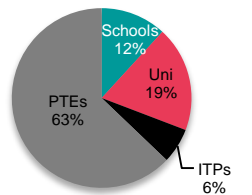


Saudi Arabia: Cumulative total for RSV vs. FSV 2010 - 2015



- Takeaways:**
- This market continues to experience negative month-on-month results.
 - The decline is partly due to an anomaly in 2014, with a significant cohort of ITP visas processed in early 2014 as part of an additional King Abdullah Scholarship Programme – Technical Training allocation.
 - The university sector has experienced a 61% (-71) drop YTD in FSVs, and the ITP sector has declined by 78% (-54).

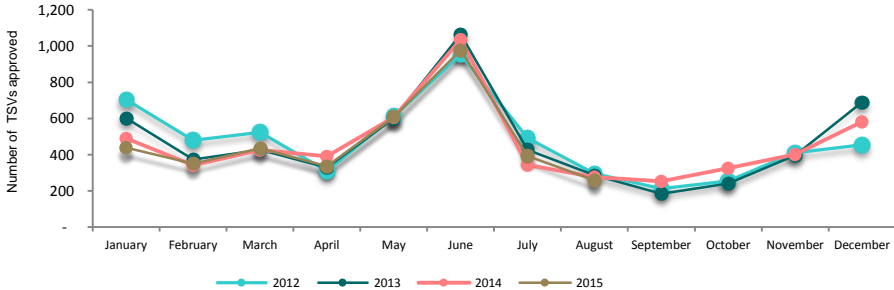
YTD 2015 sector breakdown of FSVs



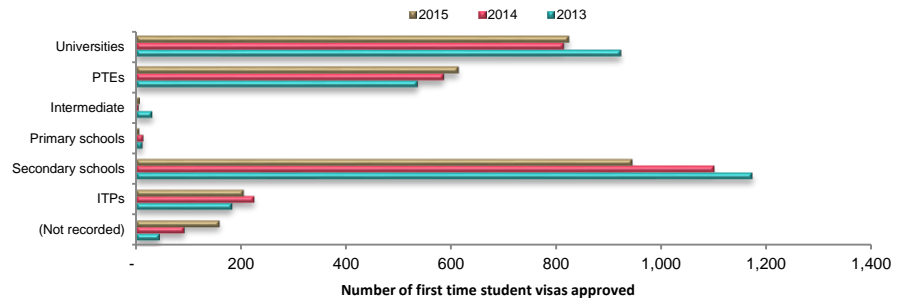
August RSV		August FSV		August TSV	
↓	-13	↓	-4	↓	-17
	-9%		-3%		-6%

YTD RSV		YTD FSV		YTD TSV	
↓	-40	↓	-74	↓	-114
	-4%		-3%		-3%

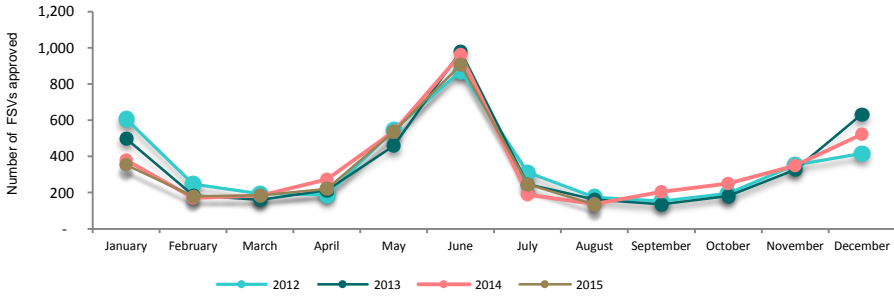
Europe: Total student visas (TSV) 2012 - 2015



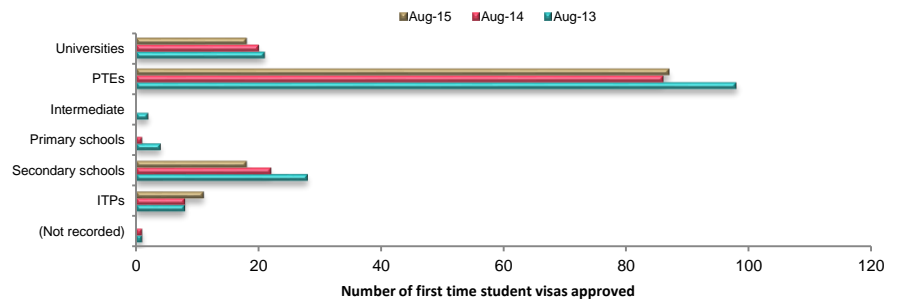
Europe: First time student visas issued by sector, YTD



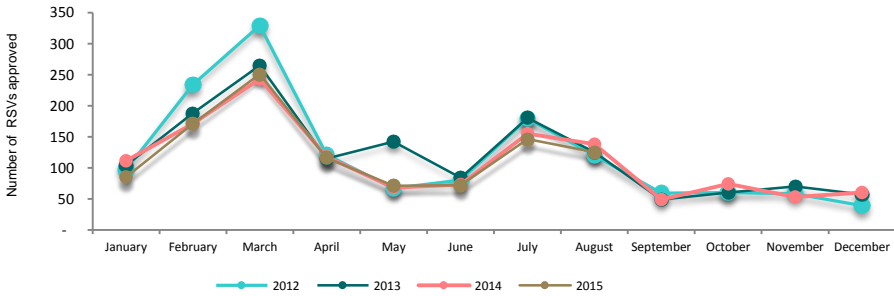
Europe: First time student visas (FSV) 2012 - 2015



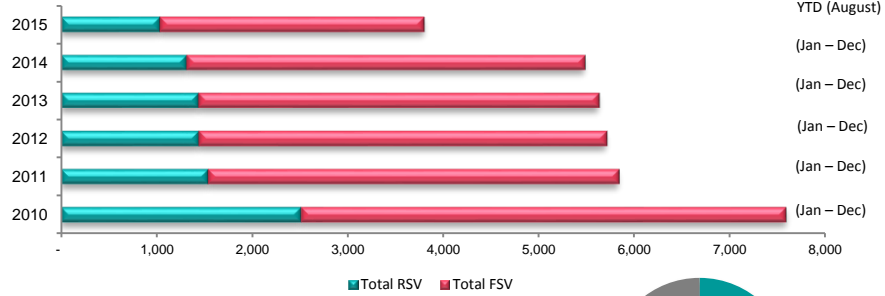
Europe: First time student visas issued by sector, August



Europe: Renewed student visas (RSV) 2012 - 2015



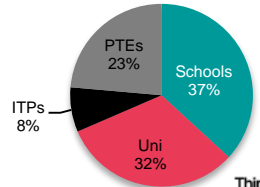
Europe: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:




- TSVs are down 3% (-114) YTD.
- August TSVs were down 6% (-17), driven by a 9% (-13) decline in RSVs.



YTD 2015 sector breakdown of FSVs



Germany:

YTD (January to August)

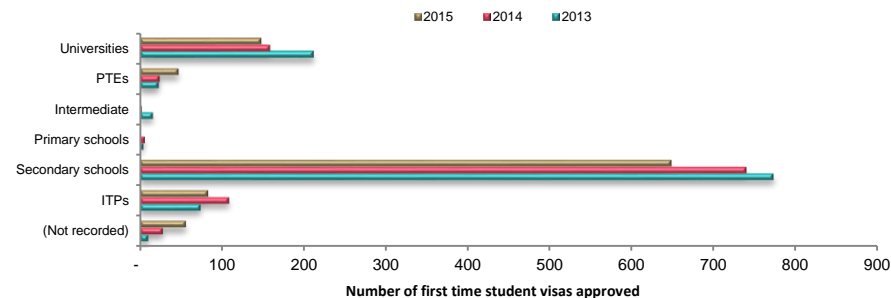
August RSV		August FSV		August TSV	
	-2		2		0
-10%		10%		0%	

YTD RSV		YTD FSV		YTD TSV	
	-32		-84		-116
-16%		-8%		-9%	

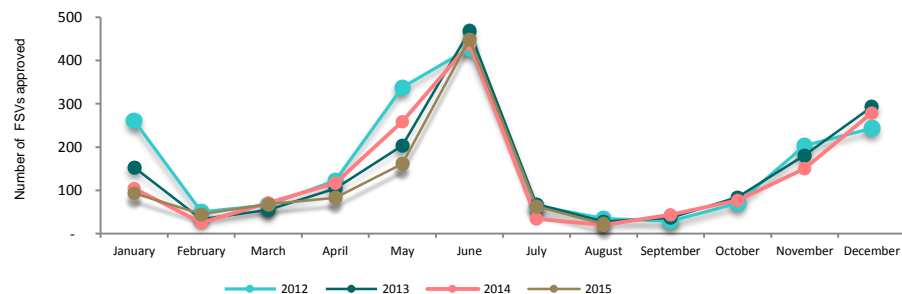
Germany: Total student visas (TSV) 2012 - 2015



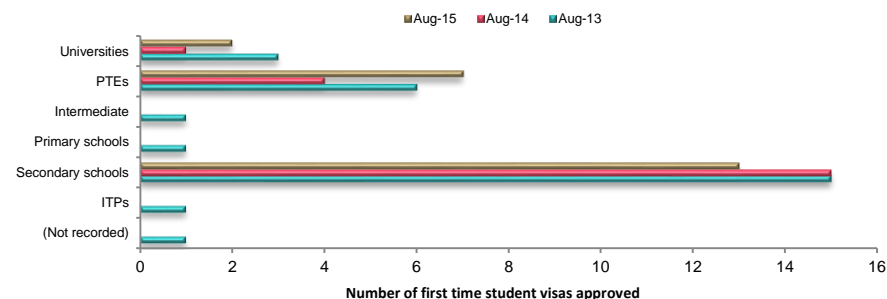
Germany: First time student visas issued by sector, YTD



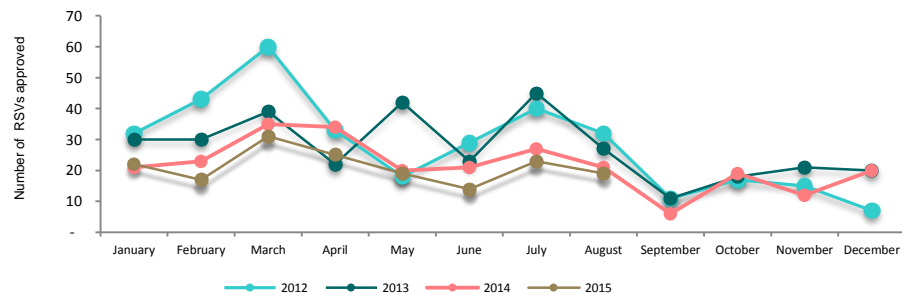
Germany: First time student visas (FSV) 2012 - 2015



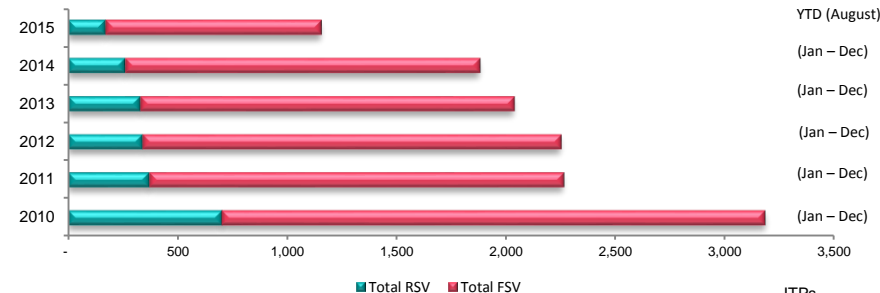
Germany: First time student visas issued by sector, August



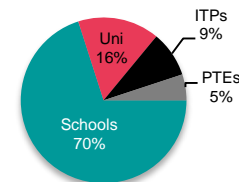
Germany: Renewed student visas (RSV) 2012 - 2015



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



YTD 2015 sector
breakdown of FSVs





Takeaways:

- This market is currently down 9% (-116) year to date in TSVs.
- With the exception of the PTE sector, all sectors experienced declines in FSVs during August.

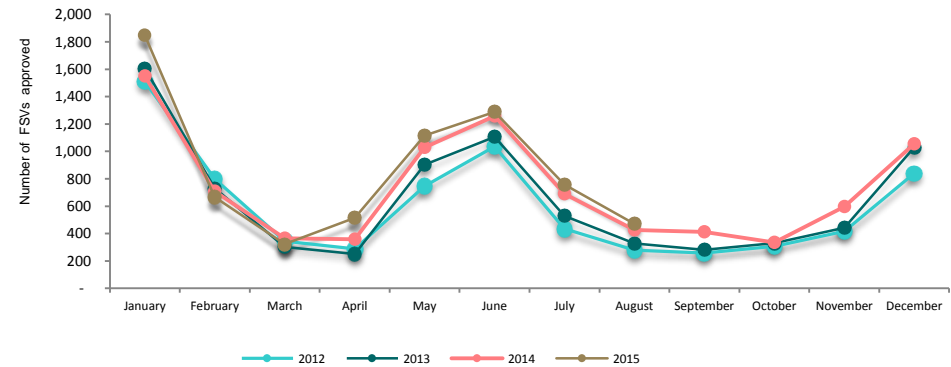
Overall: Sector overview



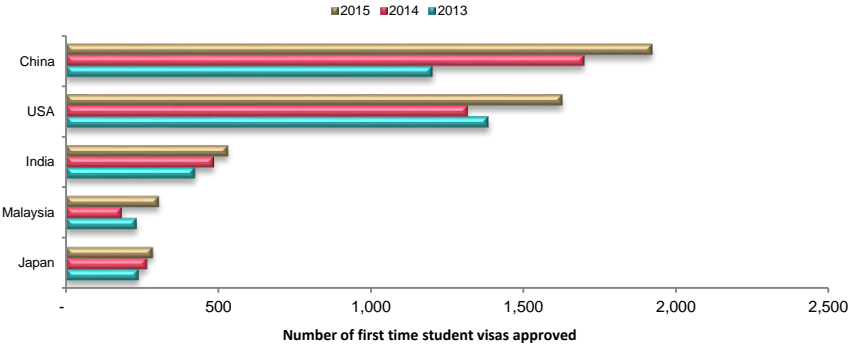
University:

August FSV		YTD FSV	
	44	10%	 593
			9%

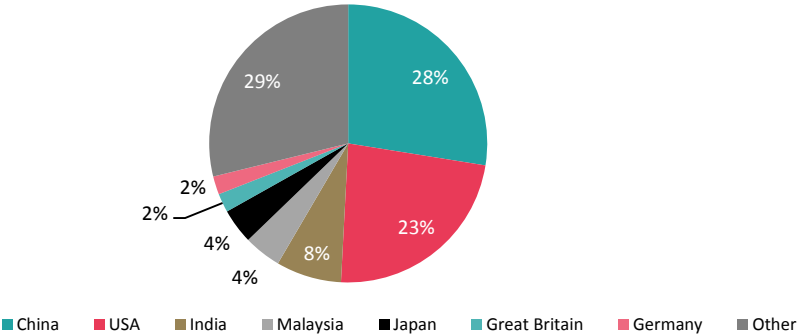
University: Total first time student visas (FSV) 2012 - 2015



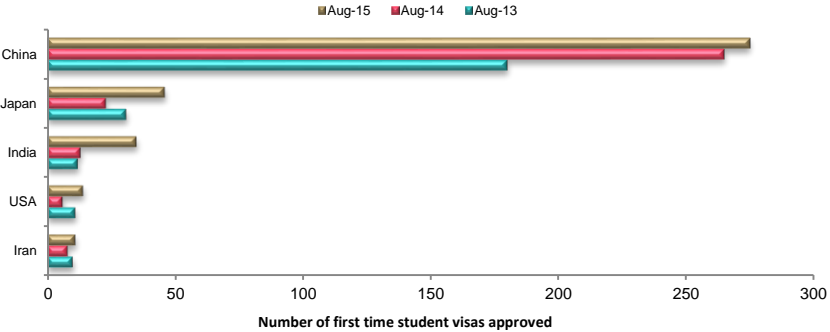
University: First time student visas issued by country, YTD



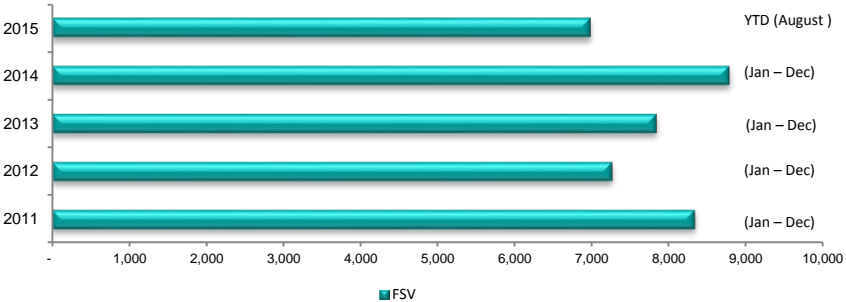
YTD 2015 country breakdown of FSVs



University: First time student visas issued, August



University: Cumulative total FSV 2011 - 2015



Takeaways:

- The university sector has grown steadily throughout 2015, with FSVs up 9% (593).
- FSV growth was driven by the USA, China, and Malaysia, up 24% (311), 13% (224), and 121 (66%) YTD.
- Together, USA and China account for 50% of all university FSV approvals YTD.

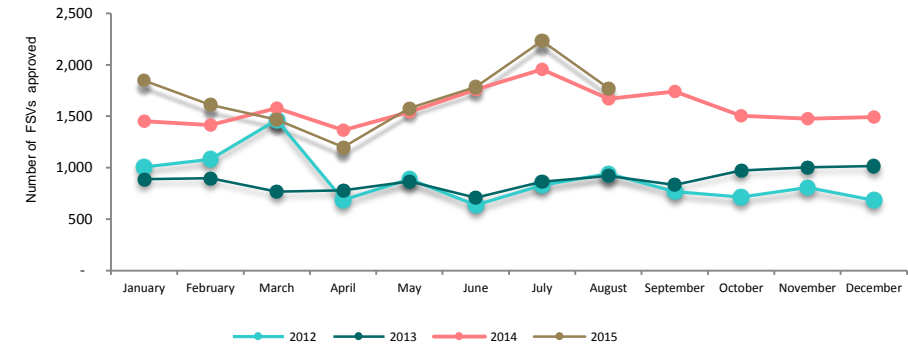
Private Training Establishments (PTE):



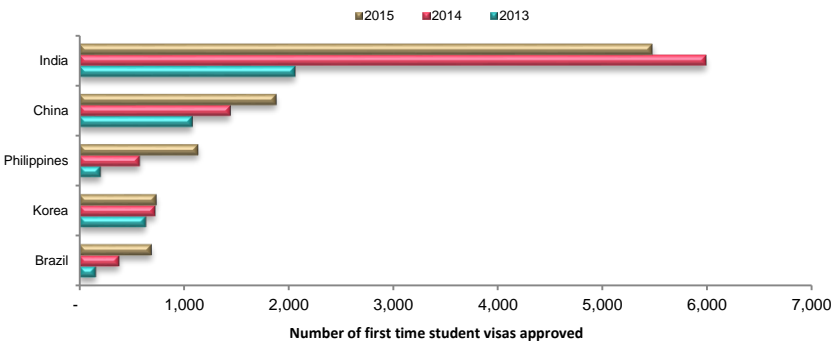
YTD (January to August)

August FSV		YTD FSV	
↑ 101	6%	↑ 751	6%

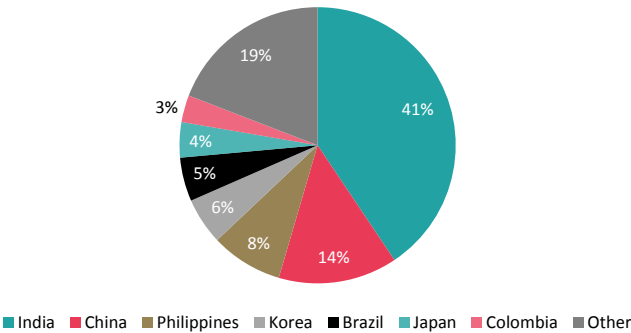
PTEs: Total first time student visas (FSV) 2012 - 2015



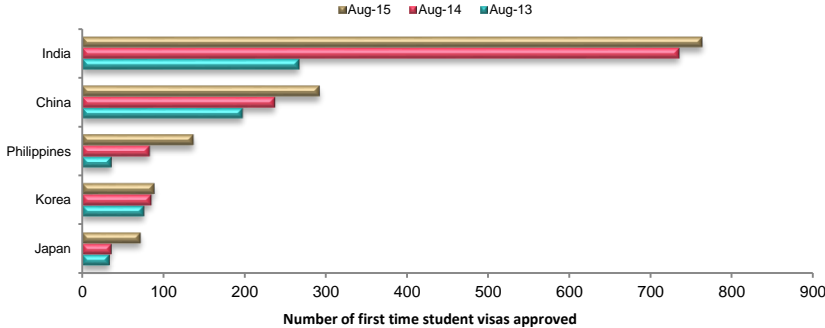
PTEs: First time student visas issued by country, YTD



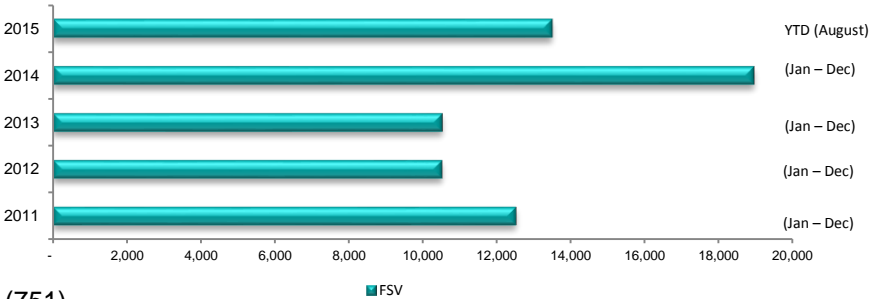
YTD 2015 country breakdown of FSVs



PTEs: First time student visas issued, August



PTEs: Cumulative total FSV 2011 - 2015



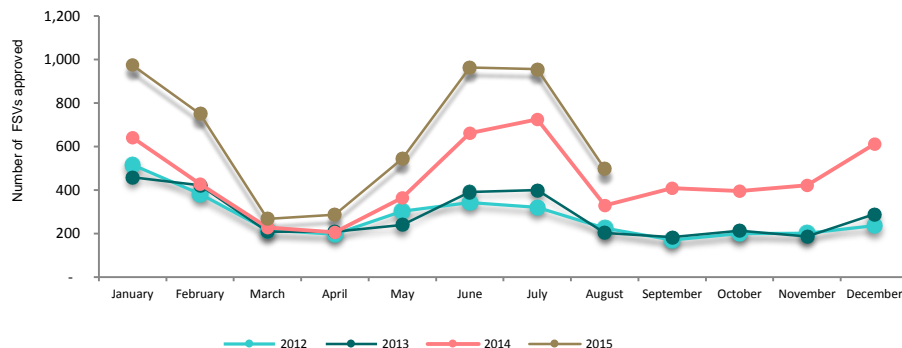
- Takeaways:
- Following a strong finish to 2014, in 2015 TSVs are also tracking positively up 6% (751).
 - Declines from the Indian market has slowed overall growth.

Institutes of Technology and Polytechnics (ITPs):

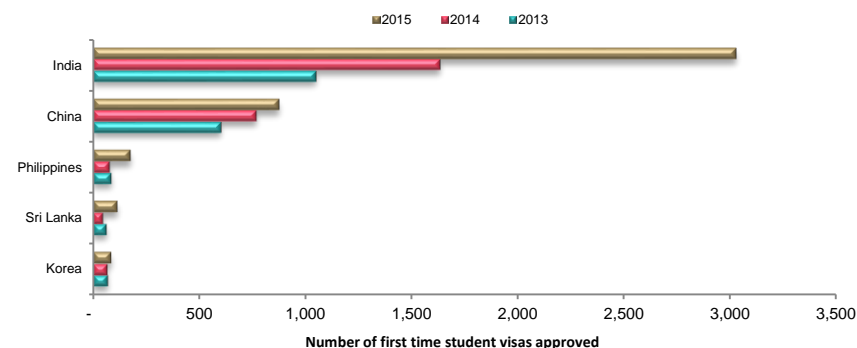
YTD (January to August)

August FSV		YTD FSV	
↑ 168	51%	↑ 1,654	46%

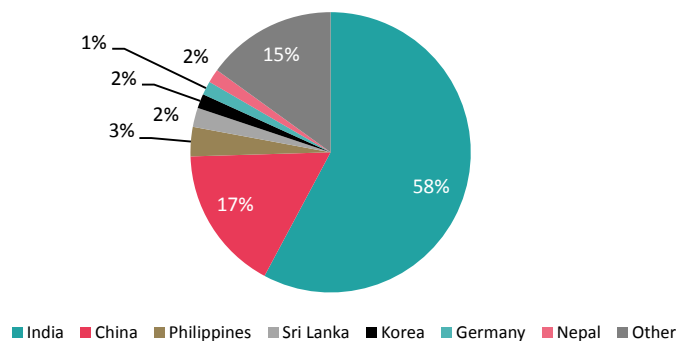
ITPs: Total first time student visas (FSV) 2012 - 2015



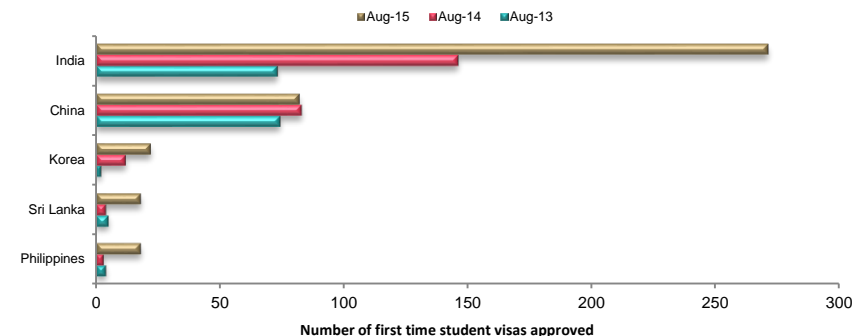
ITPs: First time student visas issued by country, YTD



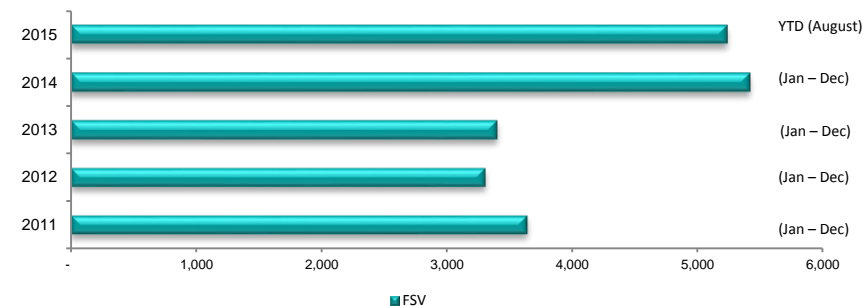
YTD 2015 country breakdown of FSVs



ITPs: First time student visas issued, August



ITPs: Cumulative total FSV 2011 - 2015



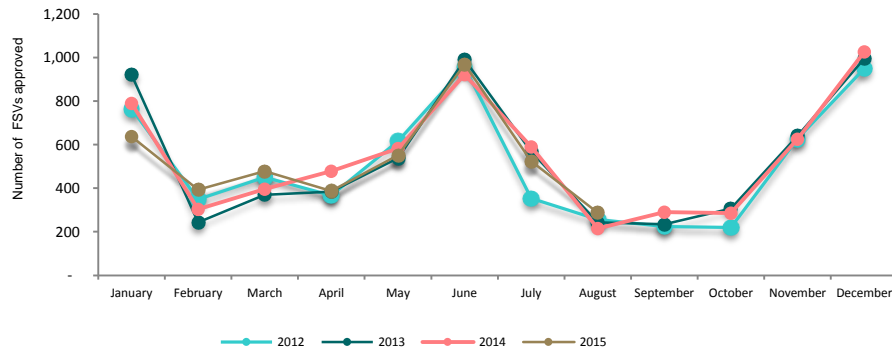
Takeaways:

- After experiencing a strong 2014 the ITP sector has continued to see strong growth in 2015, up 46% (1,654) YTD.
- This growth was driven by the Indian market, which represents 58% of all FSVs approved YTD.
- As at August, the total number of FSVs approved is close to the 2014 full year approvals.

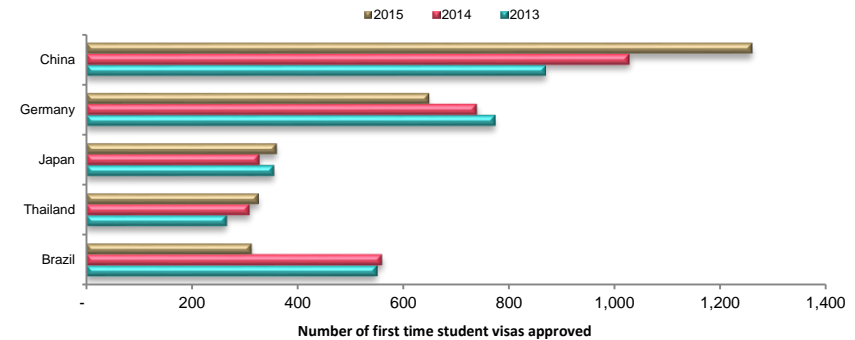
Secondary schools:

August FSV			YTD FSV	
↑	71	33%	↓ -51	-1%

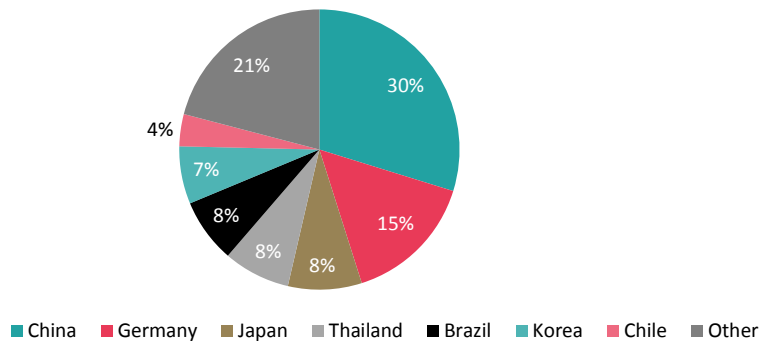
Secondary school: Total first time student visas (FSV) 2012 - 2015



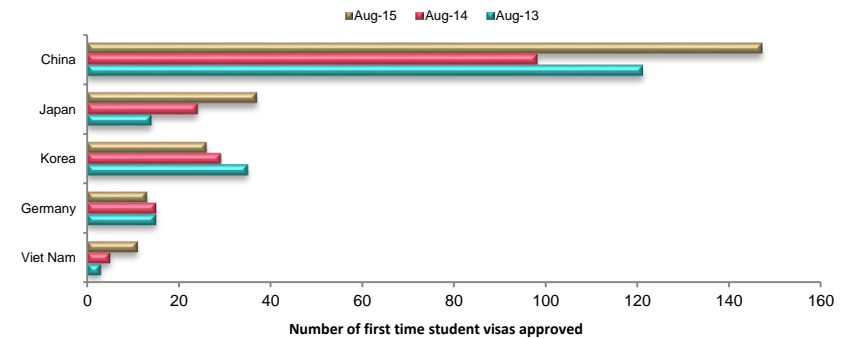
Secondary schools: First time student visas issued by country, YTD



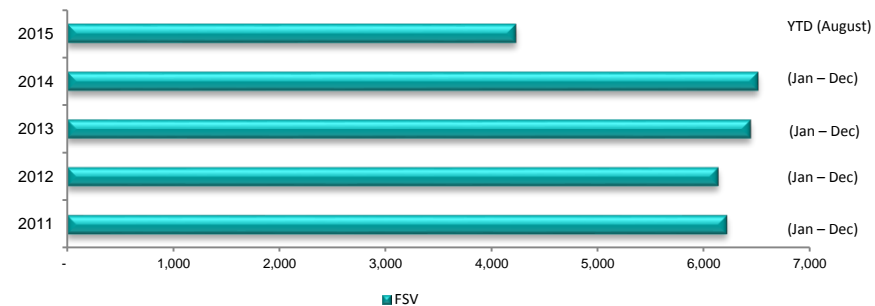
YTD 2015 country breakdown of FSVs



Secondary schools: First time student visas issued, August



Secondary school: Cumulative total FSV 2011 - 2015



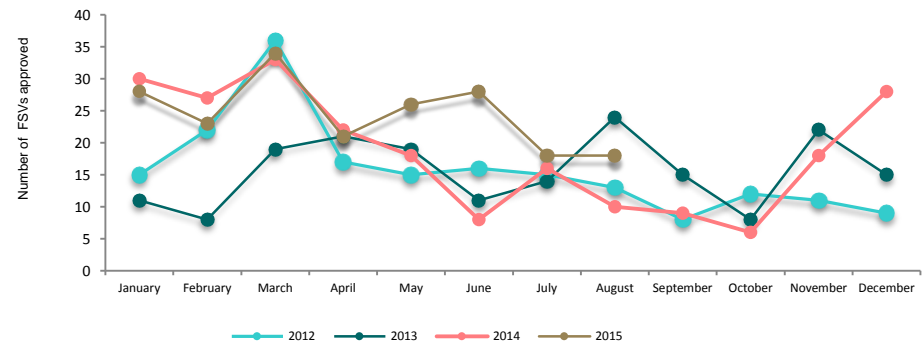
Takeaways:

- This sector has been tracking flat during 2015 YTD, down 1% (-51), partly driven by a loss in scholarship students from Latin America in January.
- August showed a strong result in FSVs, up 33% (71).
- Chinese FSVs have increased by 27% (232) YTD.

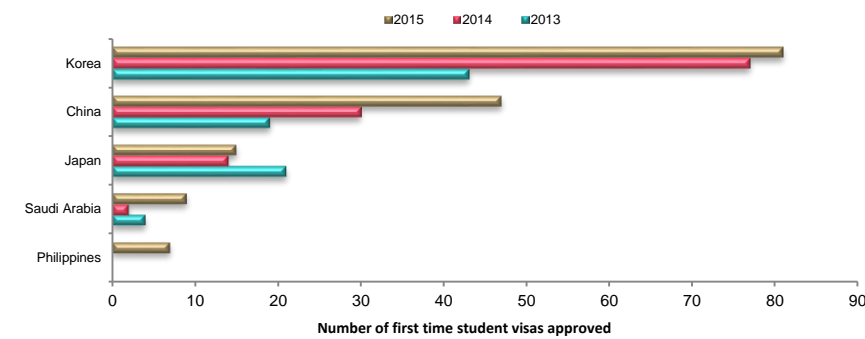
Primary schools:

YTD (January to August)			
August FSV		YTD FSV	
↑ 8	80%	↑ 32	20%

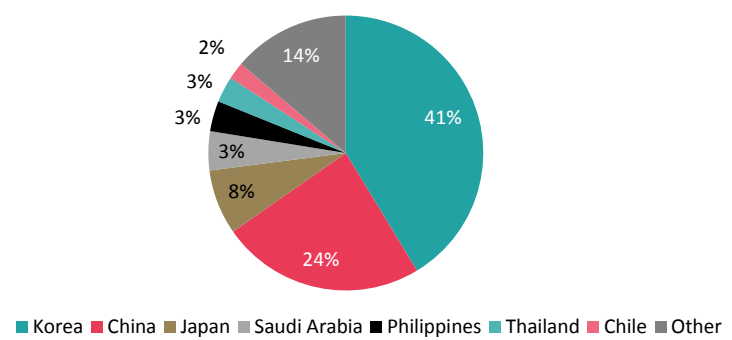
Primary schools: Total first time student visas (FSV) 2012 - 2015



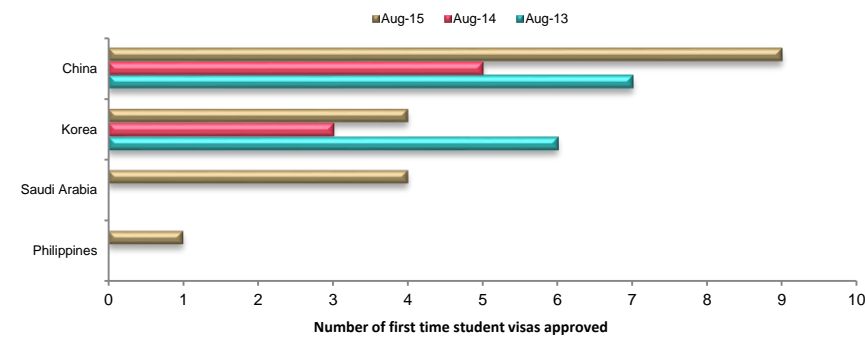
Primary schools: First time student visas issued by country, YTD



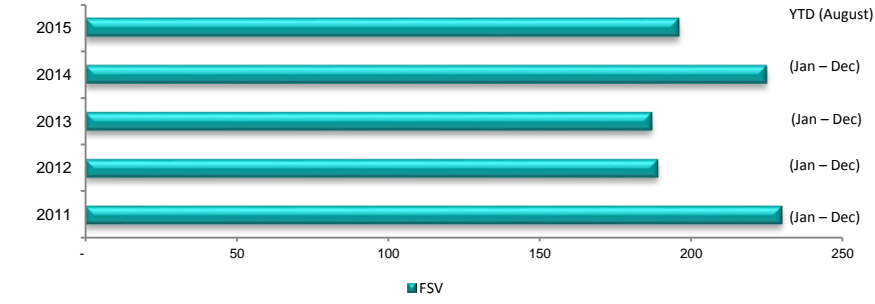
YTD 2015 country breakdown of FSVs



Primary schools: First time student visas issued, August



Primary schools: Cumulative total FSV 2011 - 2015

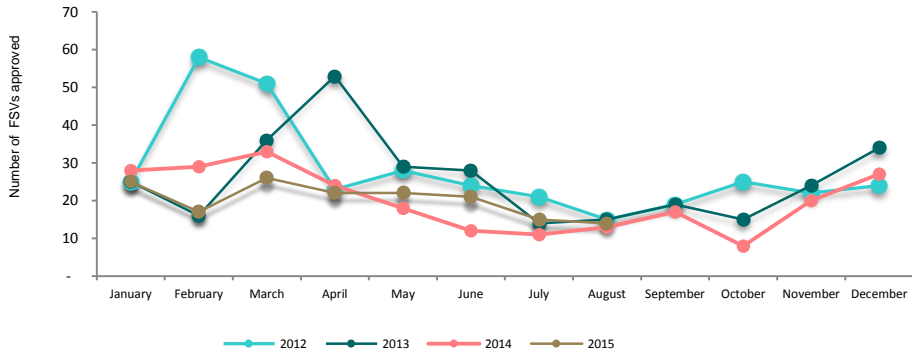


Takeaways:

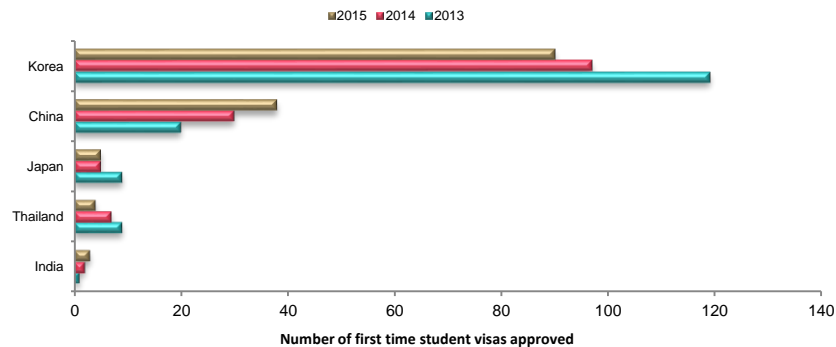
- The primary school sector is up 20% (32) YTD. The growth in the Primary school sector is driven by Korea and China.

August FSV		YTD FSV	
↑ 1	8%	↓ -6	-4%

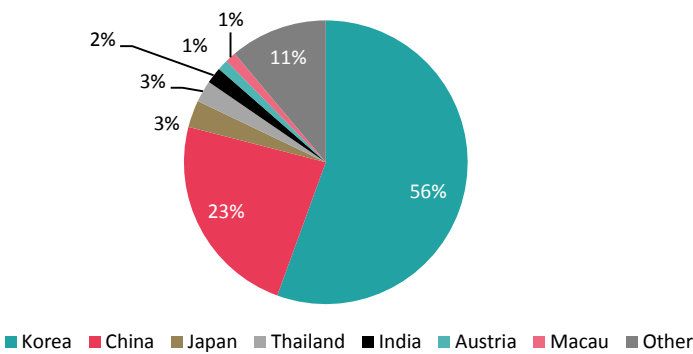
Intermediate: Total first time student visas (FSV) 2012 - 2015



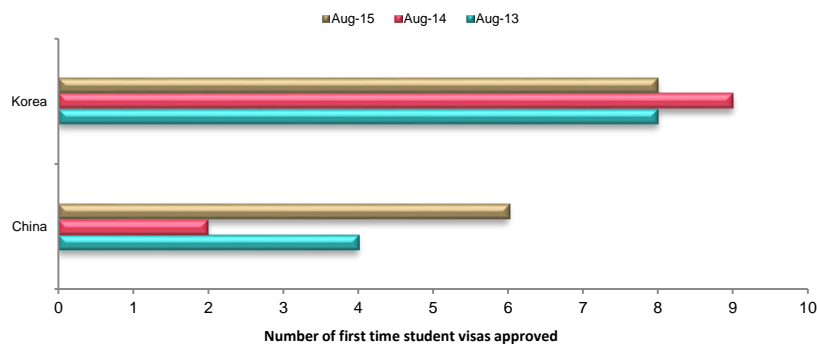
Intermediate: First time student visas issued by country, YTD



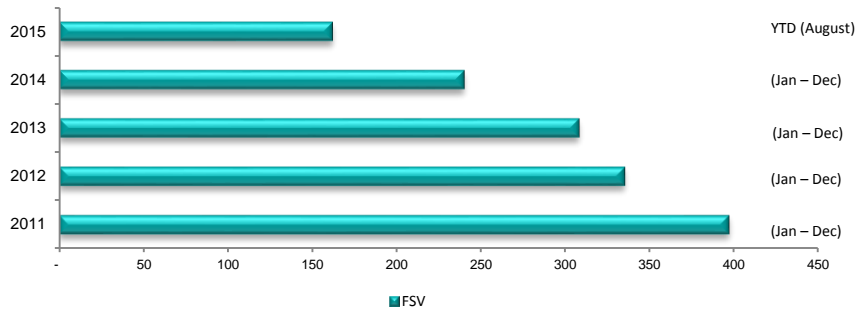
YTD 2015 country breakdown of FSVs



Intermediate: First time student visas issued, August



Intermediate: Cumulative total FSV 2011 - 2015



Takeaways:

- This sector has experienced a 4% decline YTD.