

# Student Visa Dashboard

## July 2015

**Overall:**

**Market and sector overview**



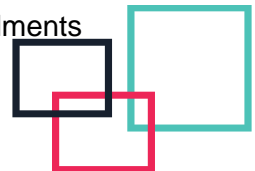
# Introduction

- *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 dependents, 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%

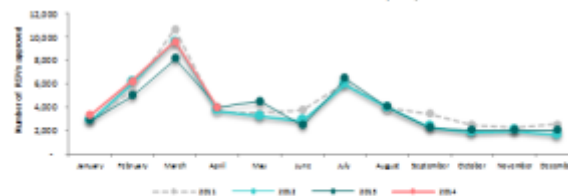
Overall: Total student visas (TSV) 2011 - 2014



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



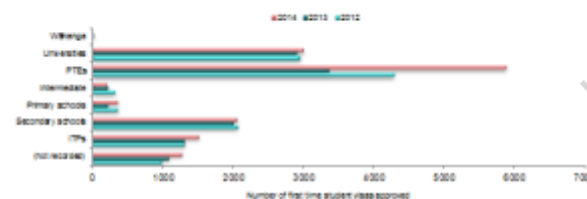
Overall: Renewed student visas (RSV) 2011 - 2014



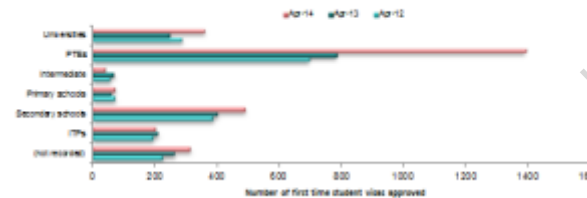
Takeaways:

- 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

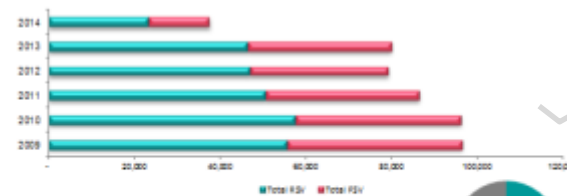
Overall: First time student visas issued by sector, YTD



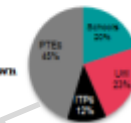
Overall: First time student visas issued by sector, April



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% (5,281) and first time student visas (FSV) are up 11% (2,737). Returning student visas are up 9% (2,544).
- YTD growth has been driven by China, India, the Philippines, the United States of America, and Colombia.
- The ITPs, PTEs, and universities have experienced the strongest YTD growth up 46% (1,509), 6% (686) and 9% (559).

## July:

- July saw 10% (953) TSV growth and 14% (563) FSV growth on 2014.
- July TSV growth was driven by India, China, the Philippines, Chile, and Sri Lanka.
- All sectors except secondary schools experienced growth.

Increases

TSVs for July	Change	% change
India	683	33%
China	284	8%
Philippines	134	94%
Chile	79	219%
Sri Lanka	36	49%

FSVs for July	Change	% change
India	283	20%
China	253	31%
Philippines	122	105%
Chile	81	300%
Malaysia	40	222%

Sector FSVs for July	Change	% change
PTEs	297	15%
ITPs	245	34%
Universities	70	10%
Intermediate	4	36%
Primary	2	13%
Secondary Schools	-67	-11%

Decreases

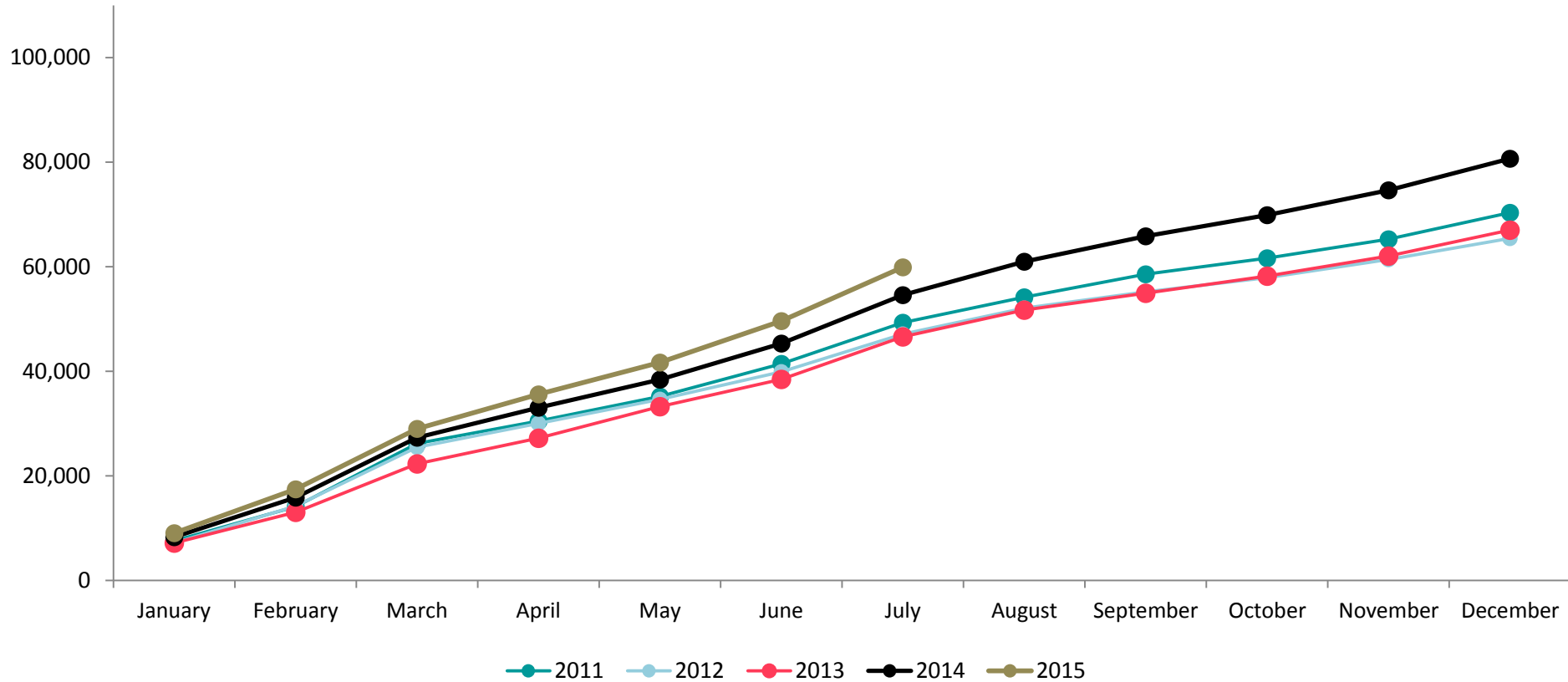
Fiji	-43	-46%
Japan	-47	-14%
Saudi Arabia	-62	-24%
Nepal	-72	-42%
Brazil	-81	-25%

Thailand	-21	-19%
Colombia	-22	-26%
Japan	-35	-16%
Brazil	-68	-25%
Nepal	-95	-67%



# Tracker: Cumulative total

ThinkNew®



## Takeaways:

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

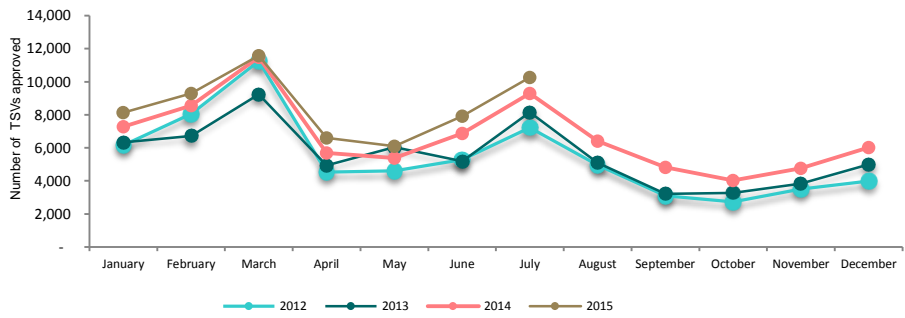




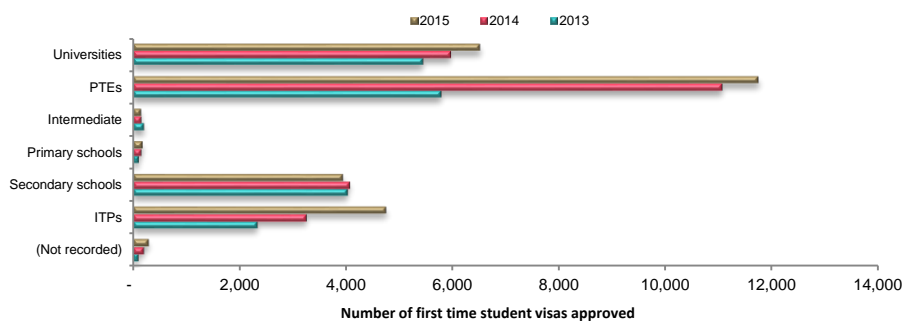
July RSV		July FSV		July TSV	
↑	390	7%	↑	563	14%
↑	953	10%			

YTD RSV		YTD FSV		YTD TSV	
↑	2,544	9%	↑	2,737	11%
↑	5,281	10%			

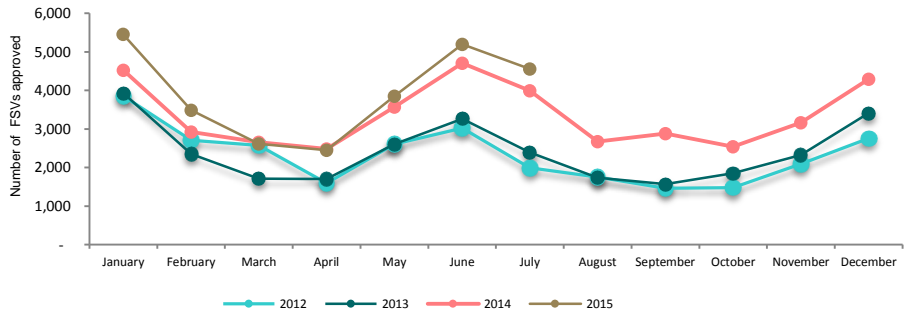
Overall: Total student visas (TSV) 2012 - 2015



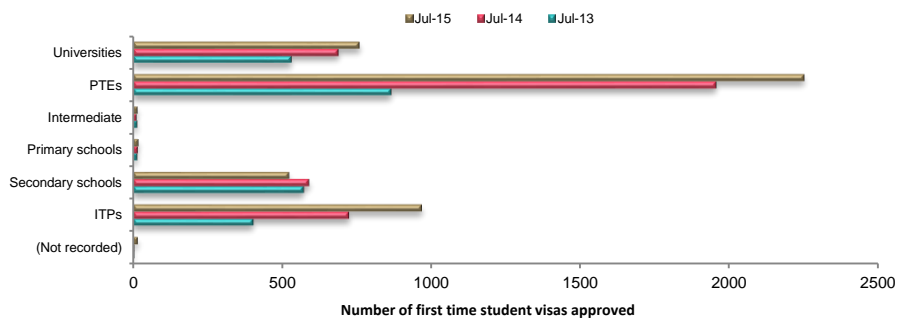
Overall: First time student visas issued by sector, YTD



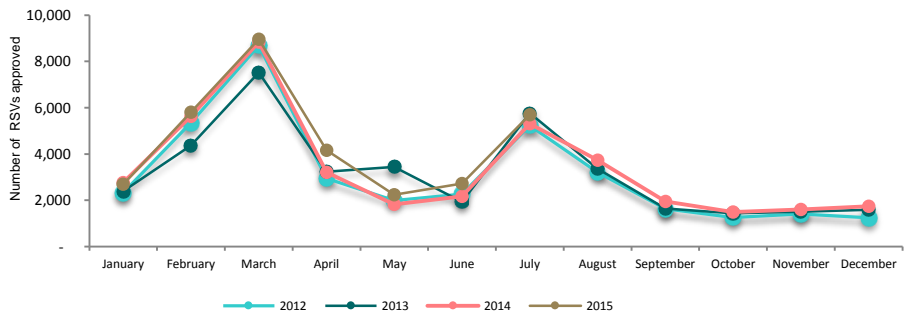
Overall: First time student visas (FSV) 2012 - 2015



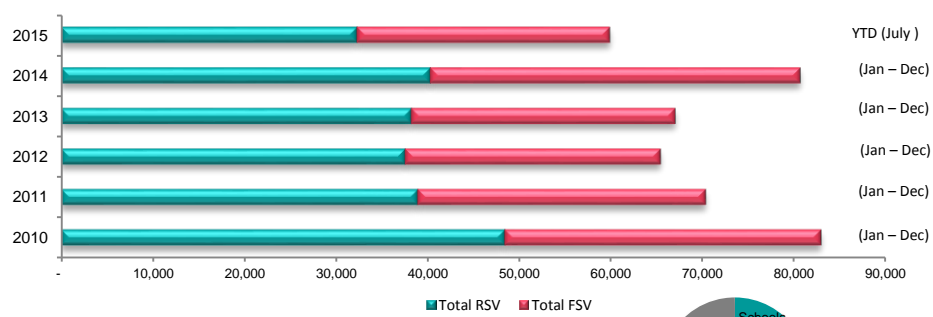
Overall: First time student visas issued by sector, July



Overall: Renewed student visas (RSV) 2012 - 2015



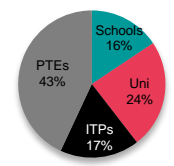
Overall: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

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

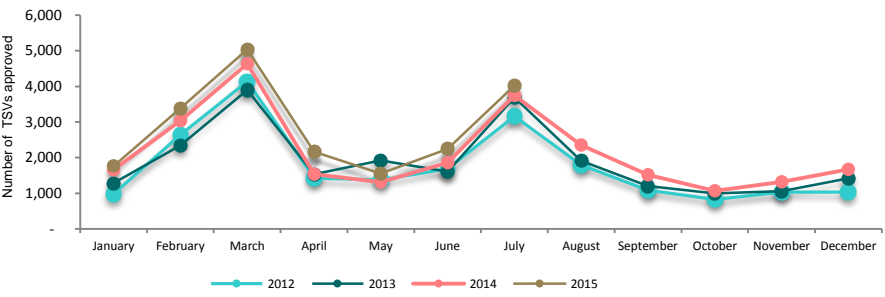
YTD 2015 sector breakdown of FSVs



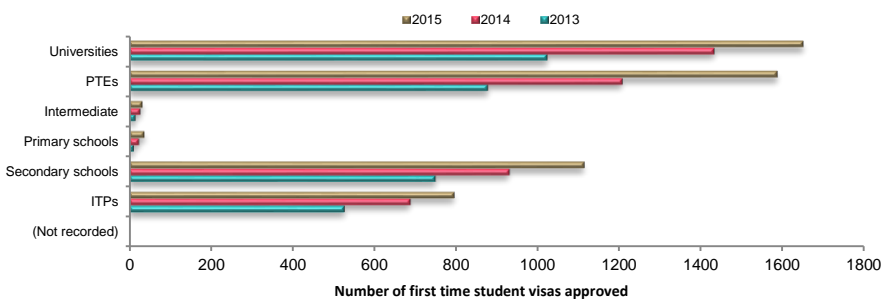
July RSV			July FSV		July TSV			
↑	31	1%	↑	253	31%	↑	284	8%

YTD RSV			YTD FSV		YTD TSV			
📈	1,487	11%	📈	908	21%	📈	2,395	13%

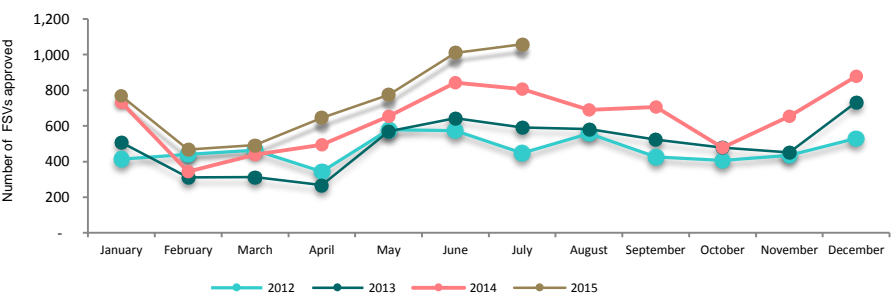
China: Total student visas (TSV) 2012 - 2015



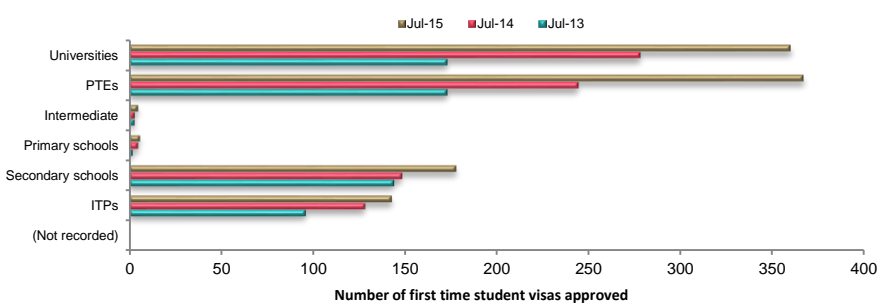
China: First time student visas issued by sector, YTD



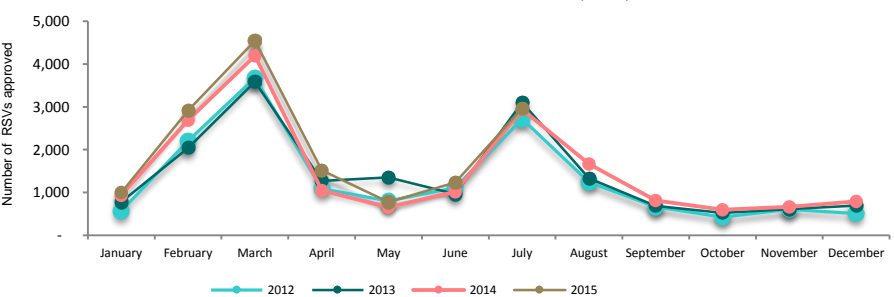
China: First time student visas (FSV) 2012 - 2015



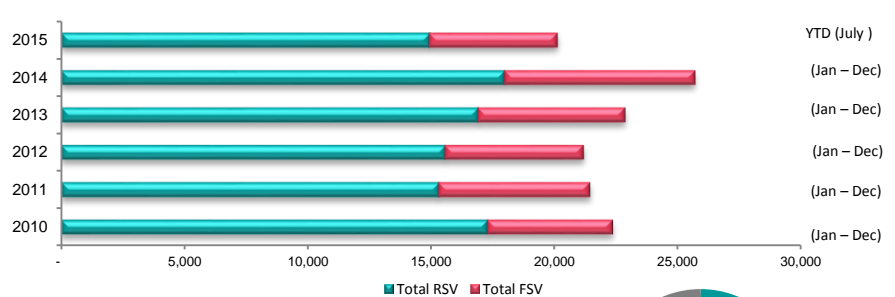
China: First time student visas issued by sector, July



China: Renewed student visas (RSV) 2012 - 2015



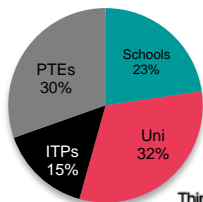
China: Cumulative total for RSV vs. FSV 2010 - 2015



## Takeaways:

- China has experienced strong growth so far in 2015, up 13% (2,395) YTD in TSVs.
- All sectors have experienced growth YTD.




YTD 2015 sector breakdown of FSVs



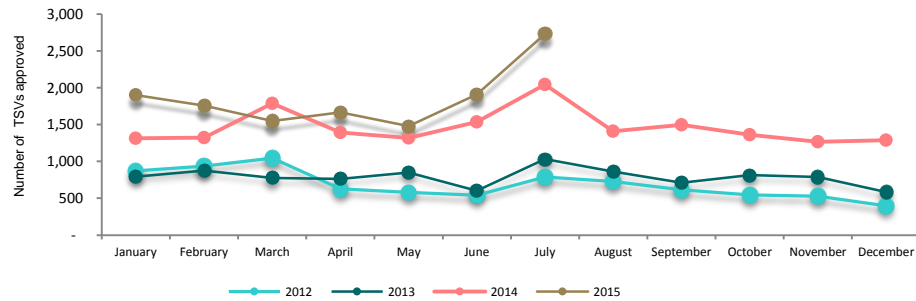


# India:

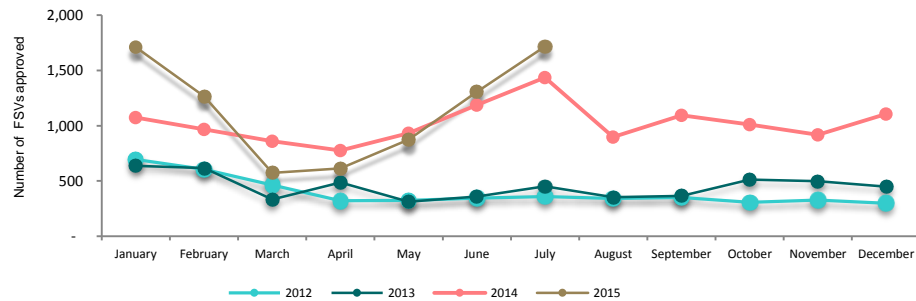
YTD (January to July)

July RSV		July FSV		July TSV	
 400	66%	 283	20%	 683	33%

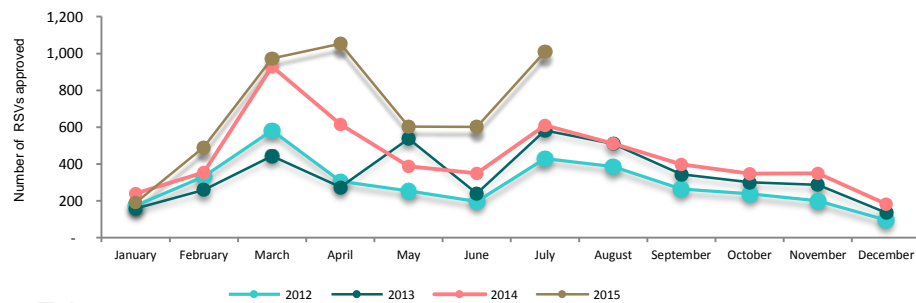
India: Total student visas (TSV) 2012 - 2015



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



India: Renewed student visas (RSV) 2012 - 2015

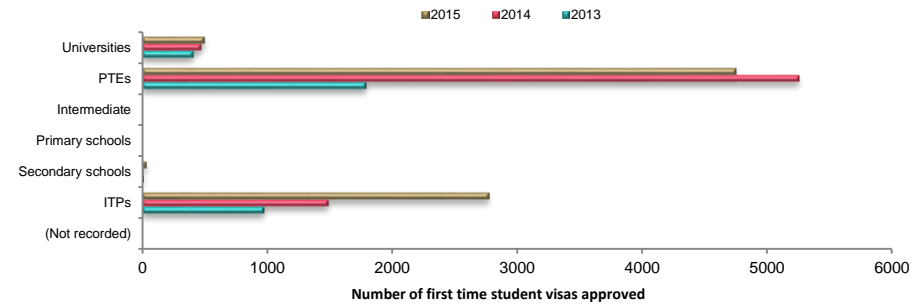


## Takeaways:

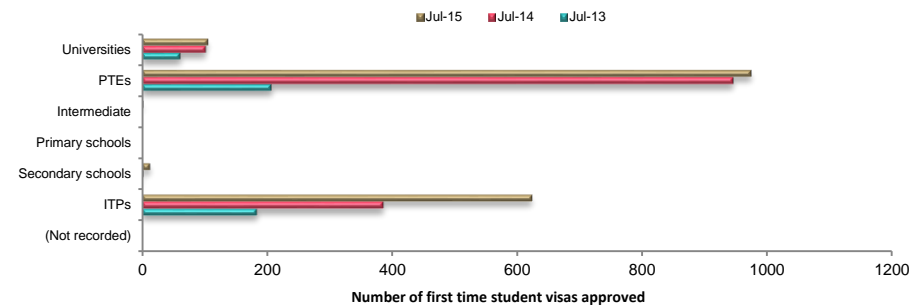
- Indian TSVs are tracking positively, up 21% (2,271) YTD.
- ITP FSVs continue to see strong growth, up 86% (1,282) YTD.

YTD RSV		YTD FSV		YTD TSV	
📈 1,436	41%	📈 835	12%	📈 2,271	21%

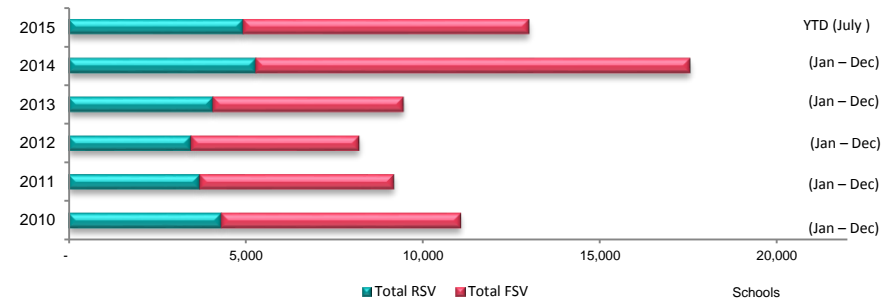
India: First time student visas issued by sector, YTD



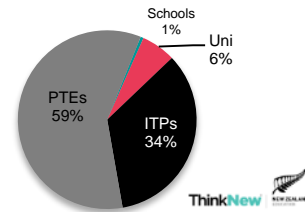
India: First time student visas issued by sector, July



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



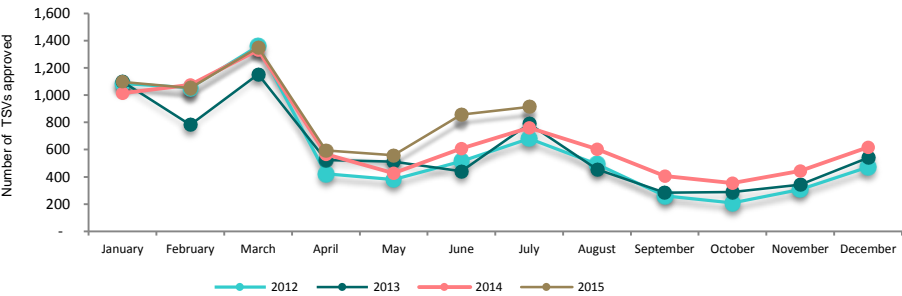
YTD 2015 sector  
breakdown of FSVs



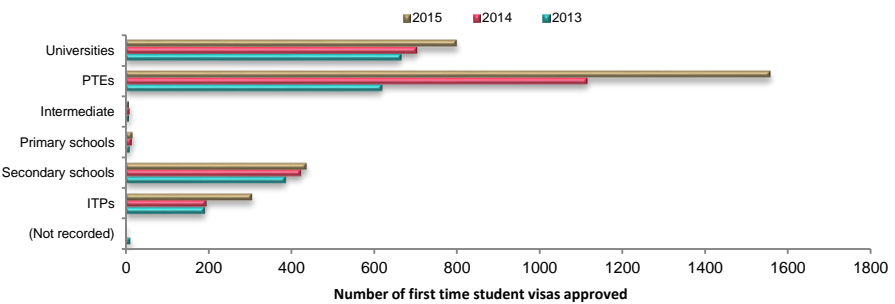
July RSV		July FSV		July TSV	
↑	16	4%	↑	138	41%
↑	154	20%			

YTD RSV		YTD FSV		YTD TSV	
↓	-21	-1%	↑	663	27%
↑	642	11%			

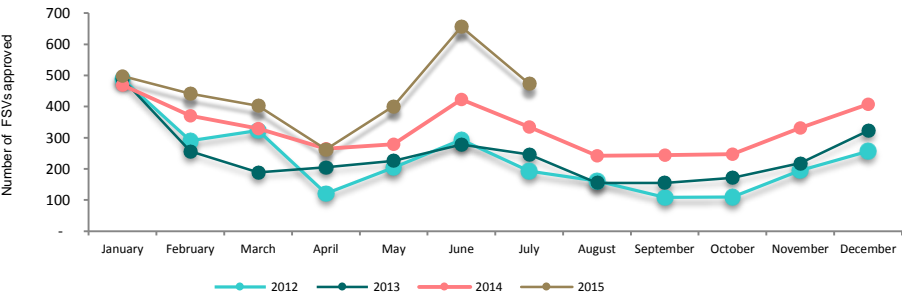
ASEAN: Total student visas (TSV) 2012 - 2015



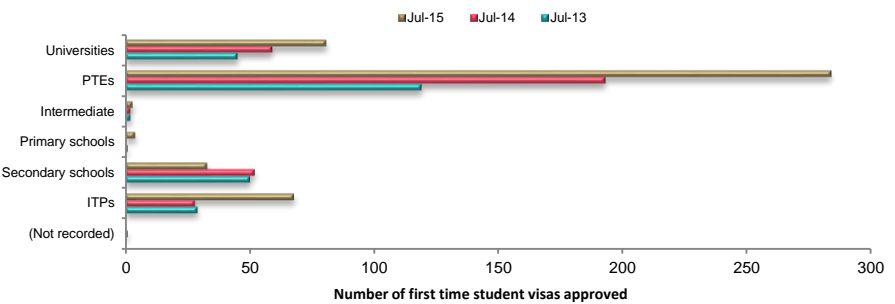
ASEAN: First time student visas issued by sector, YTD



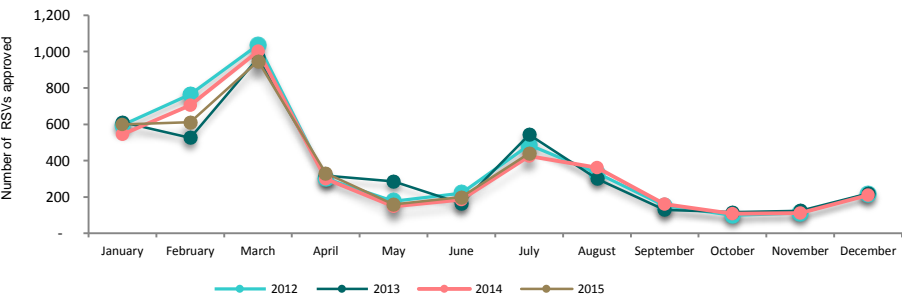
ASEAN: First time student visas (FSV) 2012 - 2015



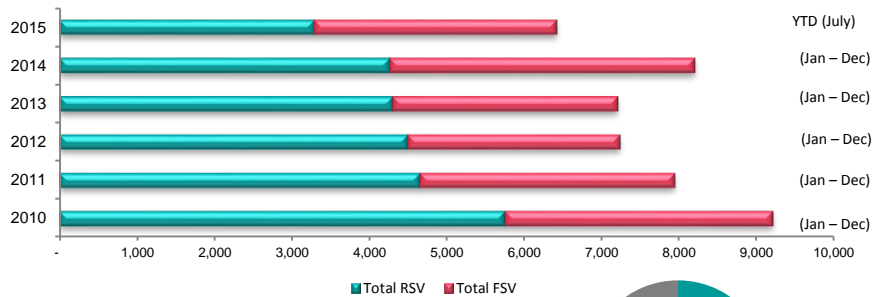
ASEAN: First time student visas issued by sector, July



ASEAN: Renewed student visas (RSV) 2012 - 2015



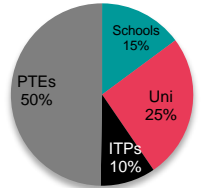
ASEAN: Cumulative total for RSV vs. FSV 2010 - 2015



## Takeaways:




- The ASEAN market experienced steady growth in 2015, however a decline in RSVs has slowed the YTD TSV position.
- FSVs have seen strong growth, up 27% (663) YTD and 41% (138) in July. This growth is primarily driven by growth in Filipino PTE students.




YTD 2015 sector breakdown of FSVs



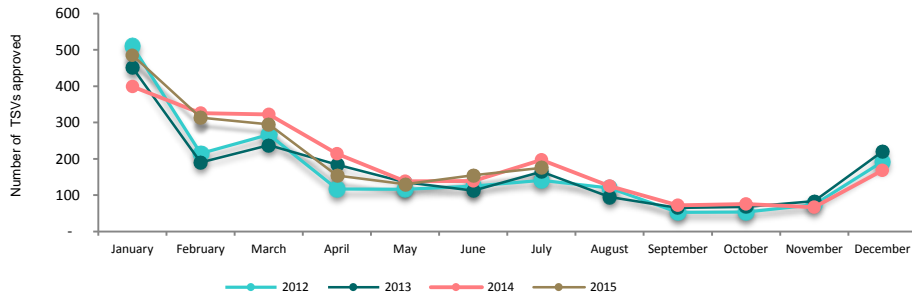
# Thailand:

YTD (January to July)

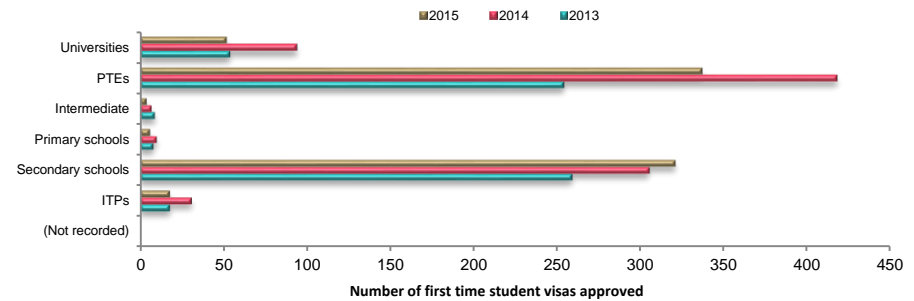
July RSV		July FSV		July TSV	
	-1		-21		-22
	-1%		-19%		-11%

YTD RSV		YTD FSV		YTD TSV	
	100		-127		-27
	11%		-15%		-2%

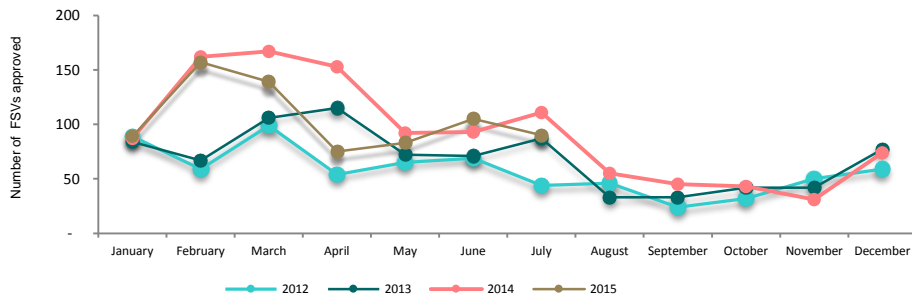
Thailand: Total student visas (TSV) 2012 - 2015



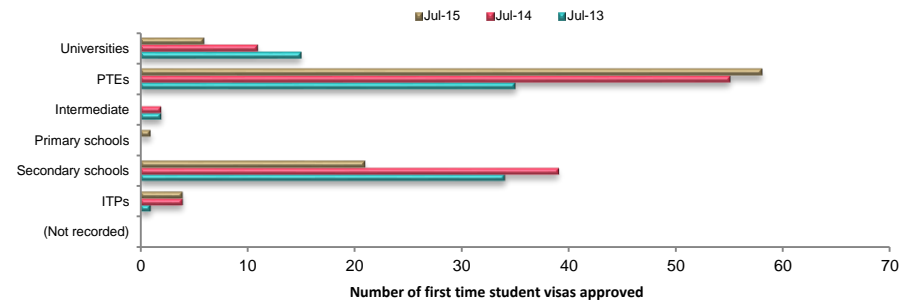
Thailand: First time student visas issued by sector, YTD



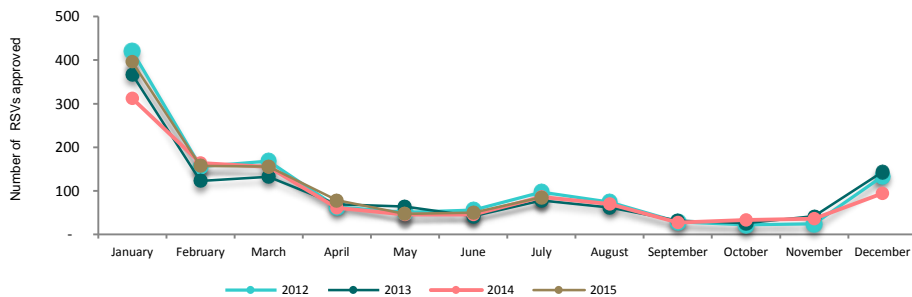
Thailand: First time student visas (FSV) 2012 - 2015



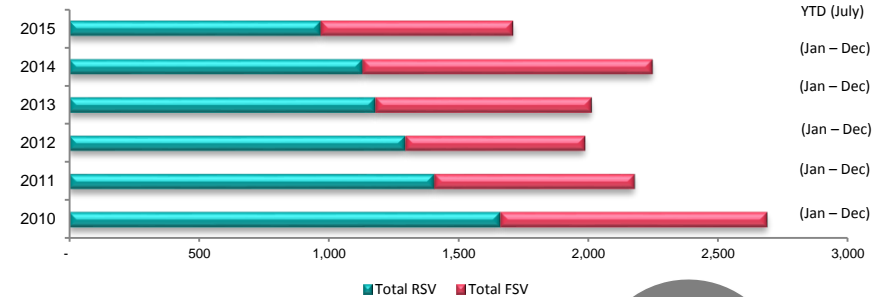
Thailand: First time student visas issued by sector, July



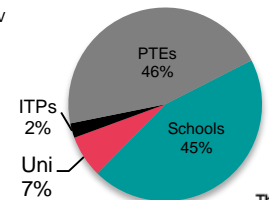
Thailand: Renewed student visas (RSV) 2012 - 2015



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



YTD 2015 sector breakdown of FSVs



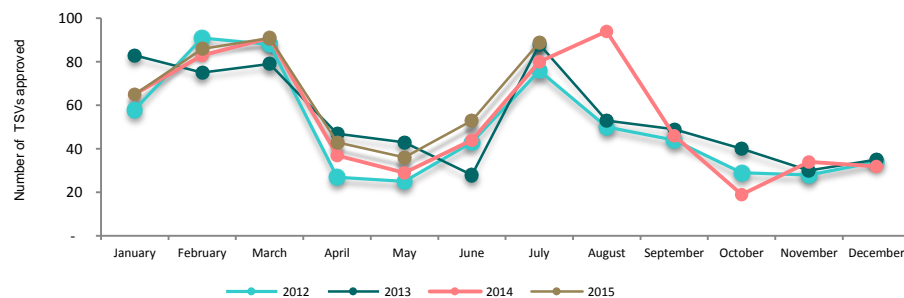
## Takeaways:

- This market is tracking flat on 2014, down 2% (-27) in TSVs.
- The secondary school sector is the only market to experience growth in FSVs YTD, up 5% (16).
- All other sectors (excluding secondary schools) declined YTD.

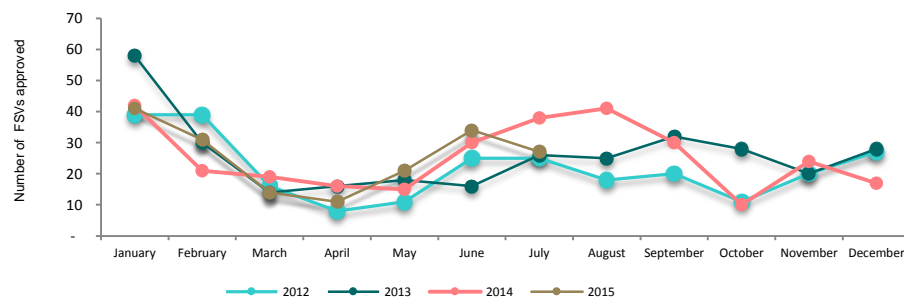
July RSV		July FSV		July TSV	
↑	20	48%	↓ -11	-29%	↑ 9
					11%

YTD RSV		YTD FSV		YTD TSV	
↑	36	15%	↓ -2	-1%	↑ 34
					8%

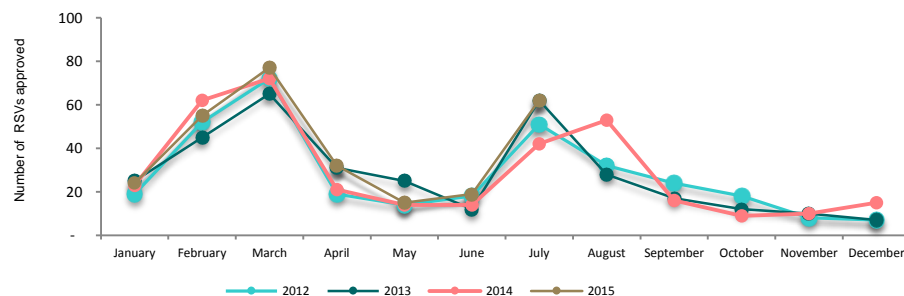
Indonesia: Total student visas (TSV) 2012 - 2015



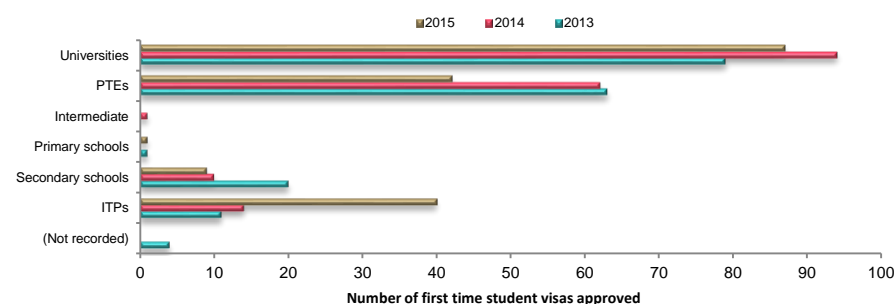
Indonesia: First time student visas (FSV) 2012 - 2015



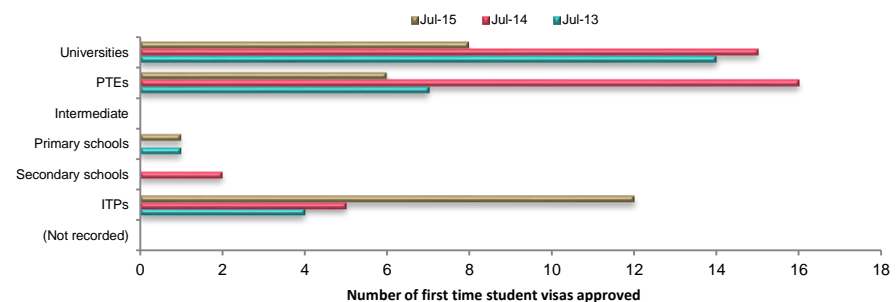
Indonesia: Renewed student visas (RSV) 2012 - 2015



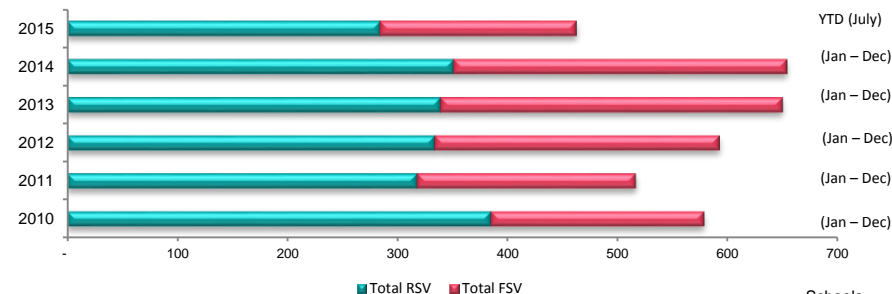
Indonesia: First time student visas issued by sector, YTD



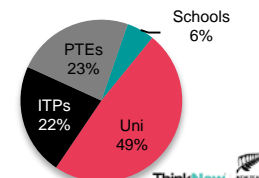
Indonesia: First time student visas issued by sector, July



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



YTD 2015 sector breakdown of FSVs



## Takeaways:

- Overall this market is tracking positively, up 8% (34) in TSVs YTD.
- ITPs have shown strong YTD growth, up 186% (26).

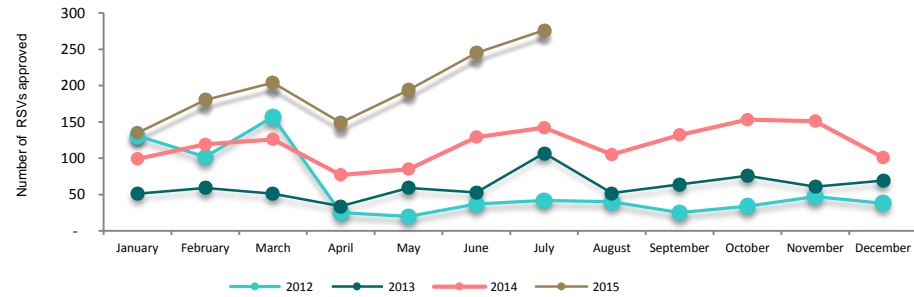
# Philippines

YTD (January to July)

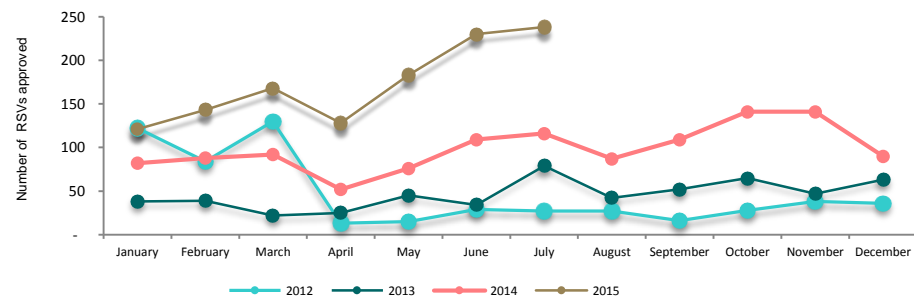
July RSV		July FSV		July TSV	
↑	12	46%	↑	122	105%
↑	134	94%			

YTD RSV		YTD FSV		YTD TSV	
↑	10	6%	↑	596	97%
↑	606	78%			

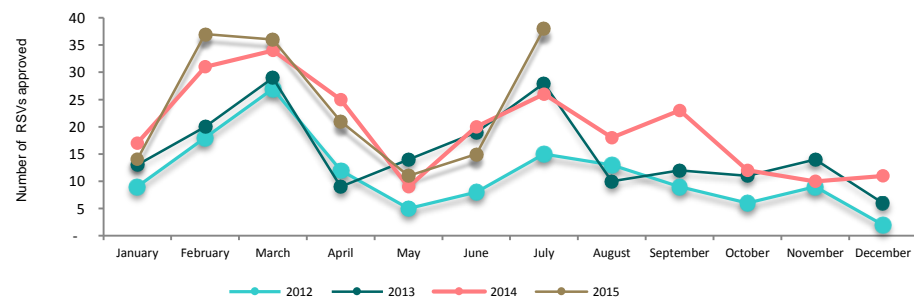
Philippines: Total student visas (TSV) 2012 - 2015



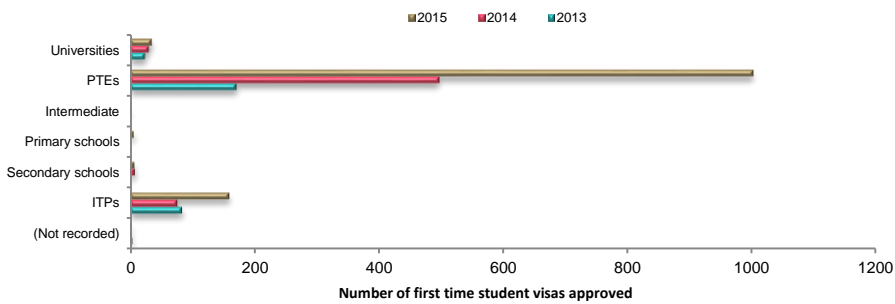
Philippines: First time student visas (FSV) 2012 - 2015



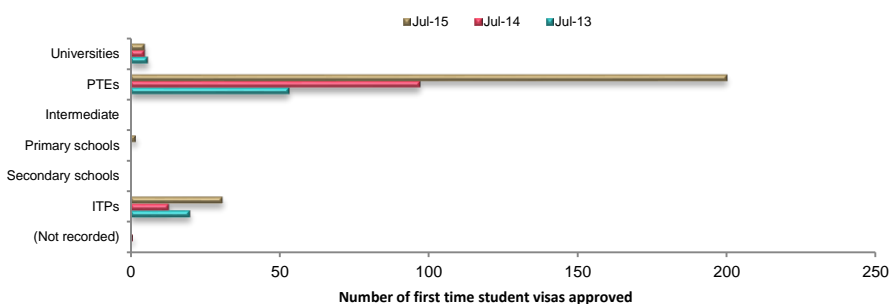
Philippines: Renewed student visas (RSV) 2012 - 2015



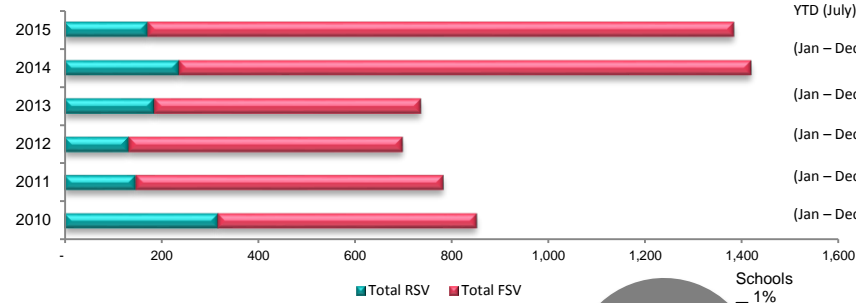
Philippines: First time student visas issued by sector, YTD



Philippines: First time student visas issued by sector, July

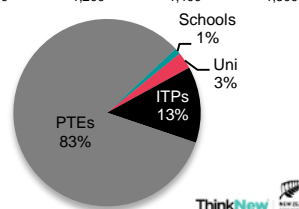





Philippines: Cumulative total for RSV vs. FSV 2010 - 2015






- 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 102% and 109%.

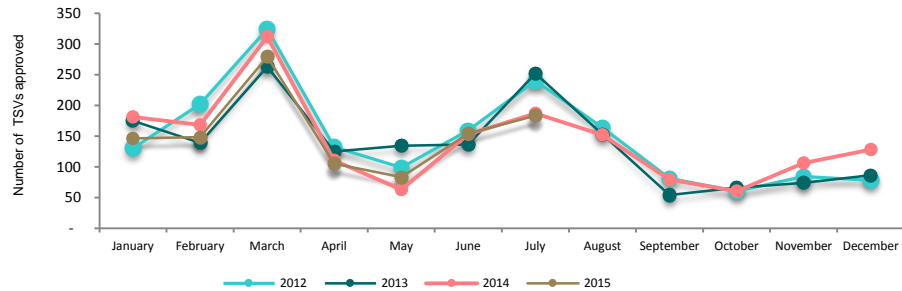
YTD 2015 sector breakdown of FSVs



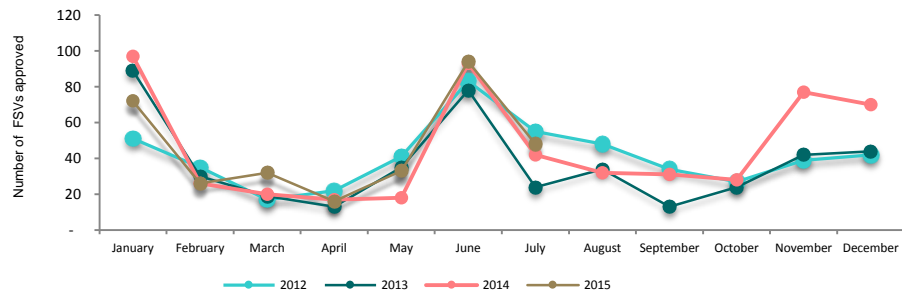
July RSV		July FSV		July TSV	
	-10		6		-4
	-7%		14%		-2%

YTD RSV		YTD FSV		YTD TSV	
	-84		8		-76
	-10%		3%		-6%

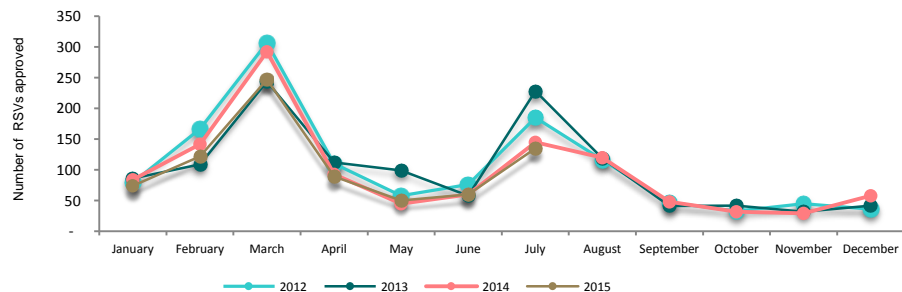
**Viet Nam: Total student visas (TSV) 2012 - 2015**



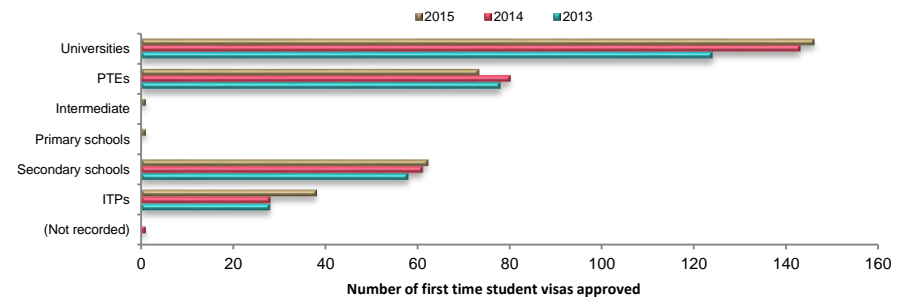
**Viet Nam: First time student visas (FSV) 2012 - 2015**



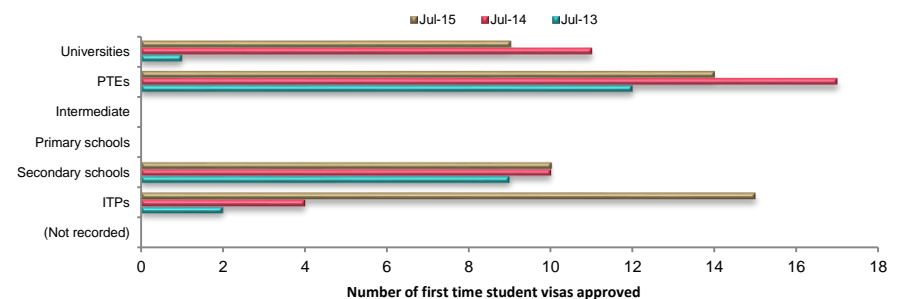
**Viet Nam: Renewed student visas (RSV) 2012 - 2015**



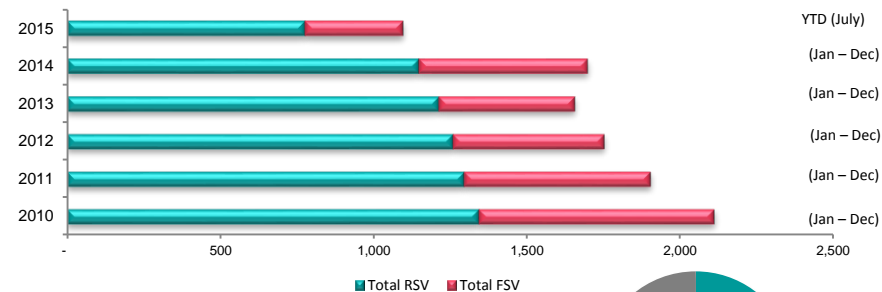
**Viet Nam: First time student visas issued by sector, YTD**



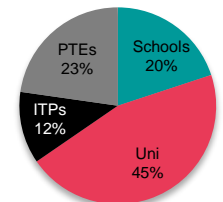
**Viet Nam: First time student visas issued by sector, July**



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



**YTD 2015 sector breakdown of FSVs**



## Takeaways:

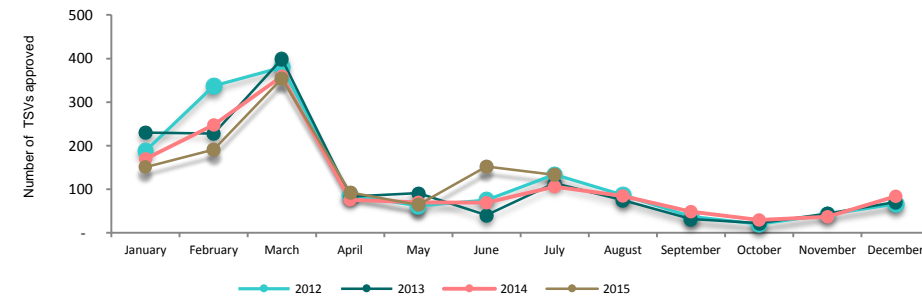
- This market has experienced a 6% decline (-76) in TSVs,
- Whilst FSVs are up 3% (8) YTD, the RSVs have declined 10% (-84).
- Reports from the market indicate that there has been a steady increase in students that have a higher risk profile for Immigration NZ. This is leading to higher declines and lower student numbers approved. ENZ is working with INZ to better understand this issue.



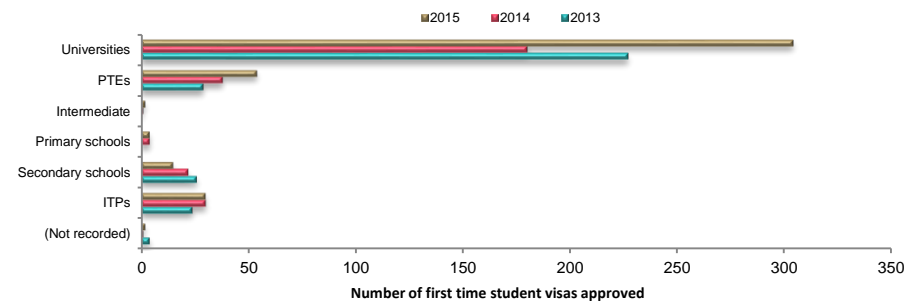
July RSV		July FSV		July TSV	
↓	-13	↑	40	↑	27
	-15%		222%		25%

YTD RSV		YTD FSV		YTD TSV	
↓	-95	↑	135	↑	40
	-12%		49%		4%

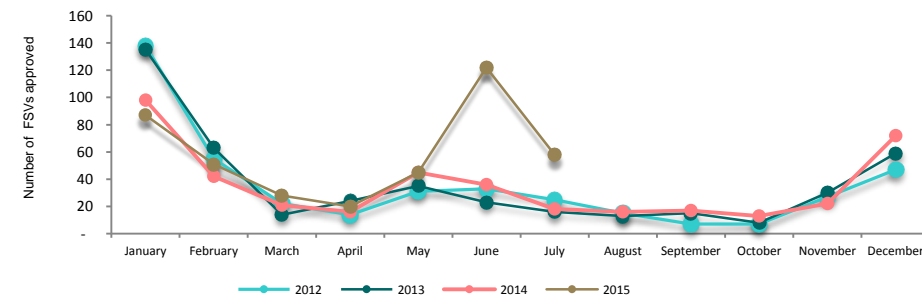
Malaysia: Total student visas (TSV) 2012 - 2015



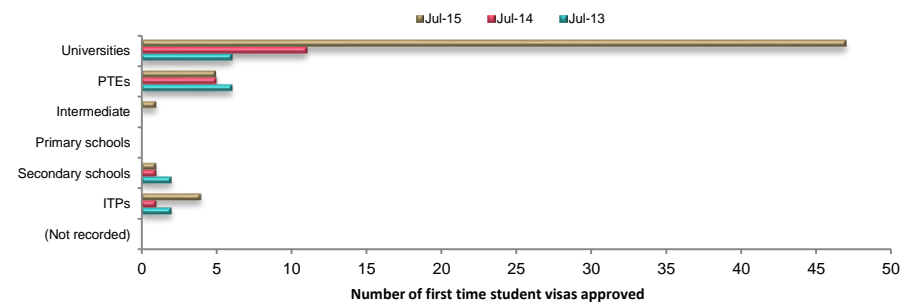
Malaysia: First time student visas issued by sector, YTD



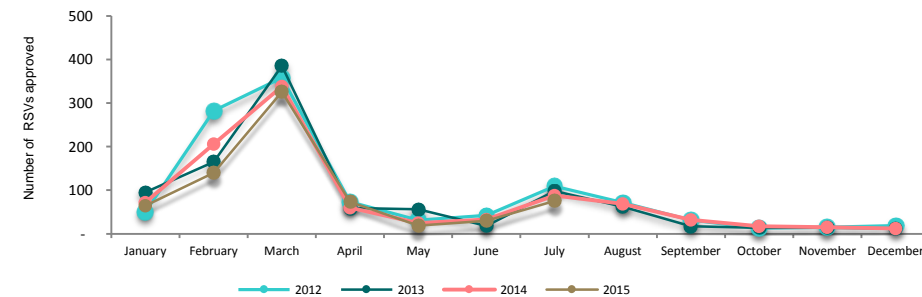
Malaysia: First time student visas (FSV) 2012 - 2015



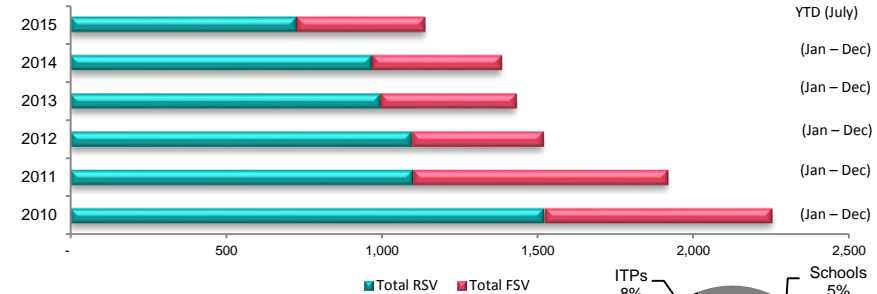
Malaysia: First time student visas issued by sector, July



Malaysia: Renewed student visas (RSV) 2012 - 2015



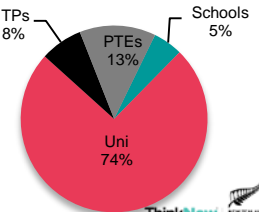
Malaysia: Cumulative total for RSV vs. FSV 2010 - 2015









## Takeaways:

- This market has tracked relatively flat throughout 2015, but the strong growth in FSVs and TSVs during June and July has pushed the YTD TSV growth up to 4% (40). FSVs are tracking up strongly YTD, at 49% (135).
- The university and PTE sectors have experienced growth, up 69% and 42% respectively.
- The growth in Malaysian university students (both YTD (69%) and during July (327)) is driven by scholarship students.

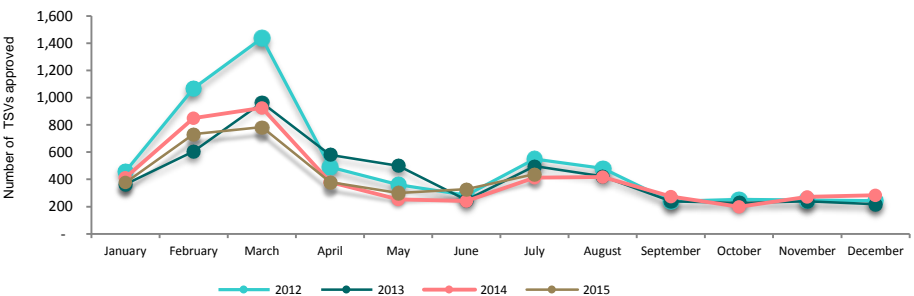
YTD 2015 sector breakdown of FSVs



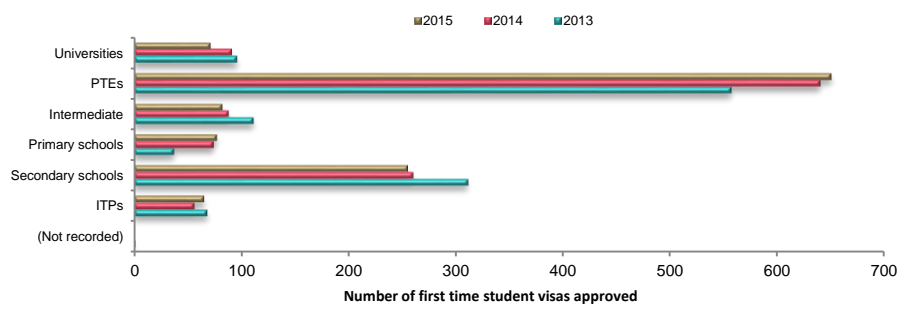
July RSV			July FSV			July TSV		
	24	9%		2	2%		26	6%

YTD RSV			YTD FSV			YTD TSV		
	-126	-6%		-9	-1%		-135	-4%

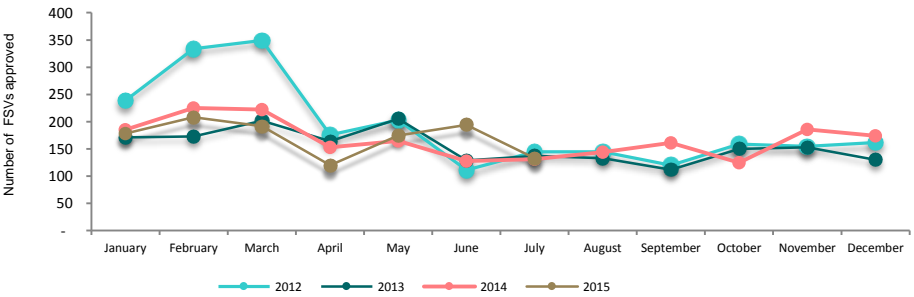
Korea: Total student visas (TSV) 2012 - 2015



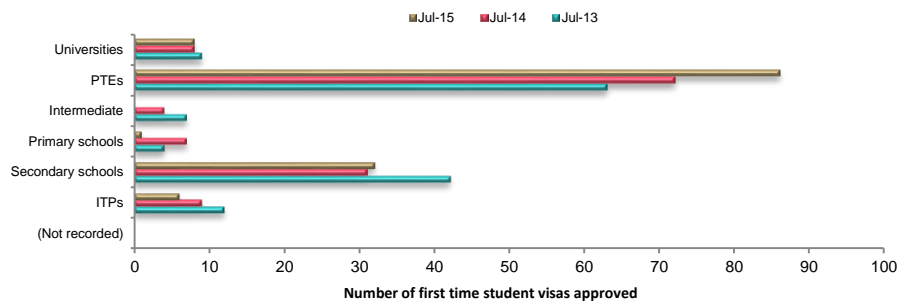
Korea: First time student visas issued by sector, YTD



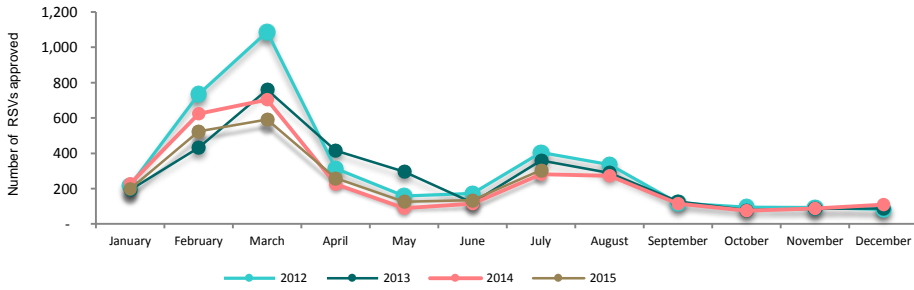
Korea: First time student visas (FSV) 2012 - 2015



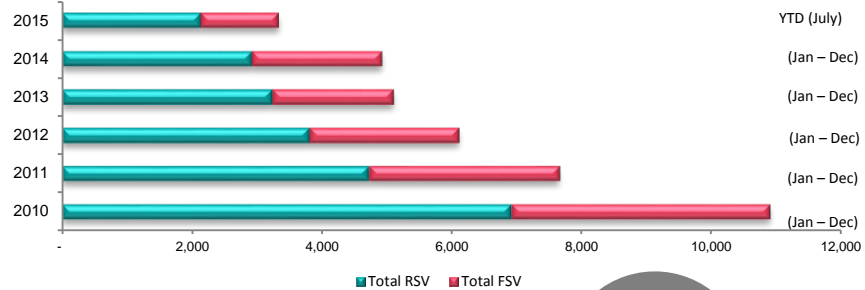
Korea: First time student visas issued by sector, July



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



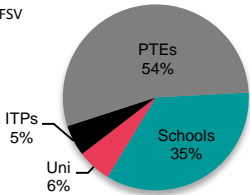
Korea: Cumulative total for RSV vs. FSV 2010 - 2015



## Takeaways:

- This market is tracking flat, down 4% (-135 TSVs).
- July has been largely flat with FSVs up 2% (2), whilst TSVs have shown growth, up 6% (26).

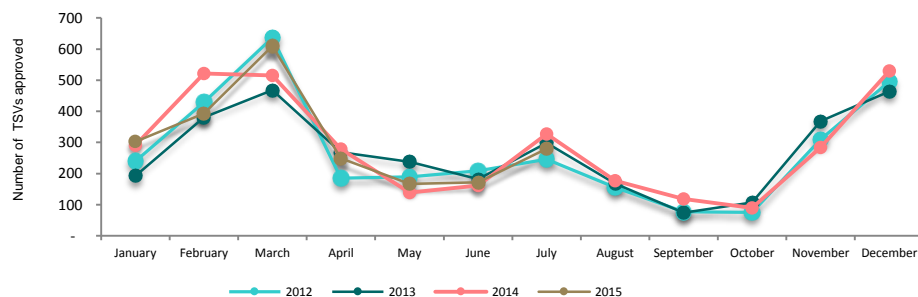
YTD 2015 sector breakdown of FSVs



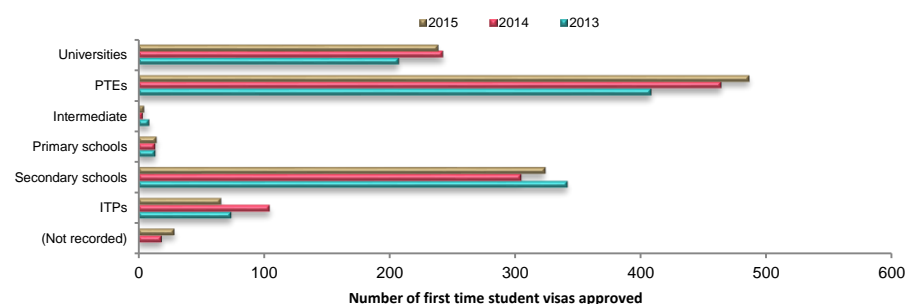
July RSV		July FSV		July TSV	
↓	-12	↓	-35	↓	-47
	-11%		-16%		-14%

YTD RSV		YTD FSV		YTD TSV	
↓	-68	↑	8	↓	-60
	-6%		1%		-3%

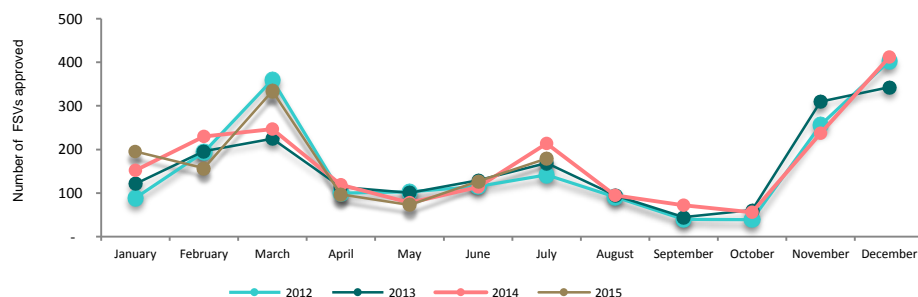
Japan: Total student visas (TSV) 2012 - 2015



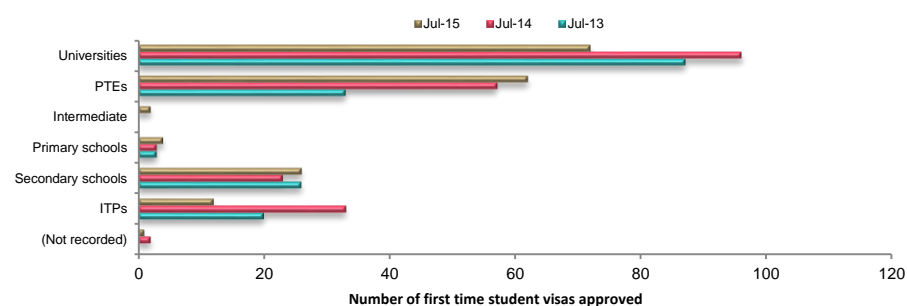
Japan: First time student visas issued by sector, YTD



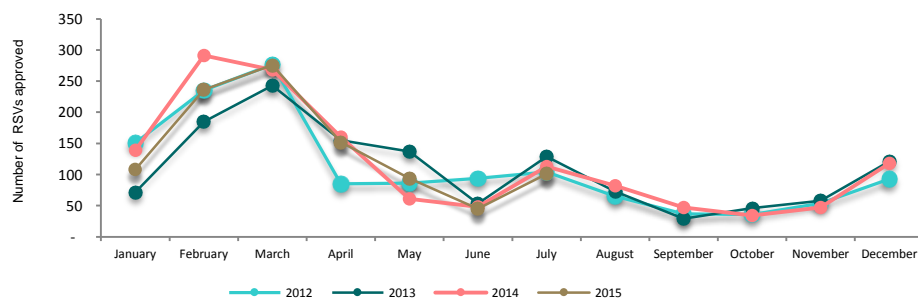
Japan: First time student visas (FSV) 2012 - 2015



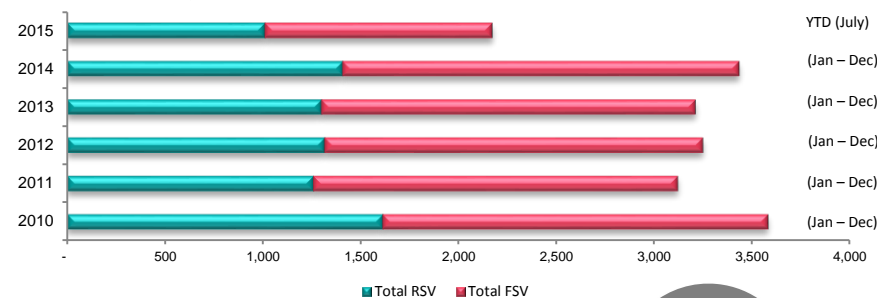
Japan: First time student visas issued by sector, July



Japan: Renewed student visas (RSV) 2012 - 2015



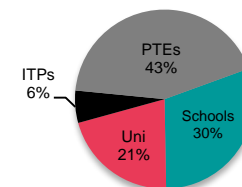
Japan: Cumulative total for RSV vs. FSV 2010 - 2015



## Takeaways:

- Japan has continued to track relatively flat YTD, down 3% (-60).
- July saw both RSVs and FSVs decline (-11% and -16% respectively), driving a decrease in TSVs (down 14%).

YTD 2015 sector breakdown of FSVs



# United States of America:

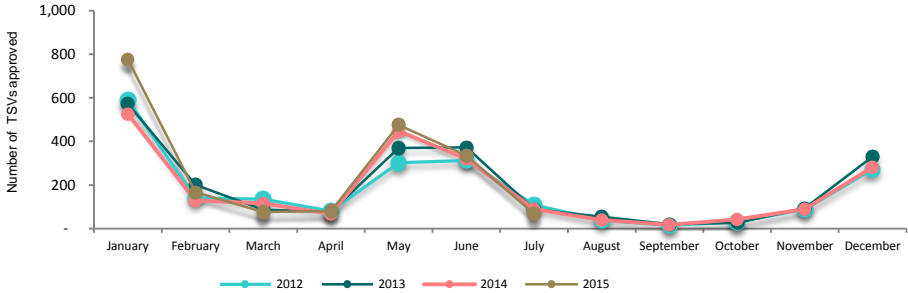


YTD (January to July)

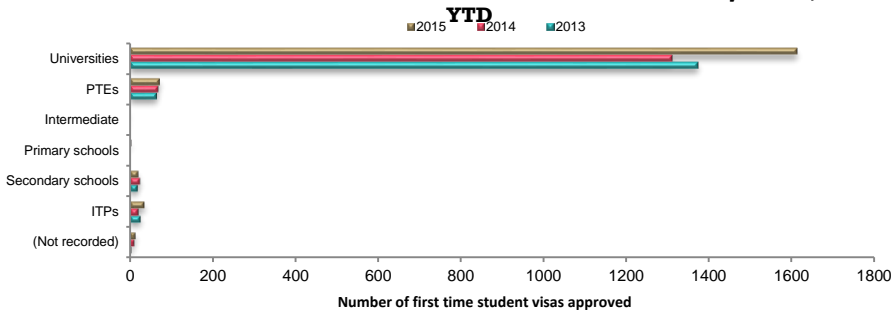
July RSV		July FSV		July TSV	
↓	-3	↓	-18	↓	-21
	-9%		-32%		-23%

YTD RSV		YTD FSV		YTD TSV	
↓	-40	↑	324	↑	284
	-15%		23%		17%

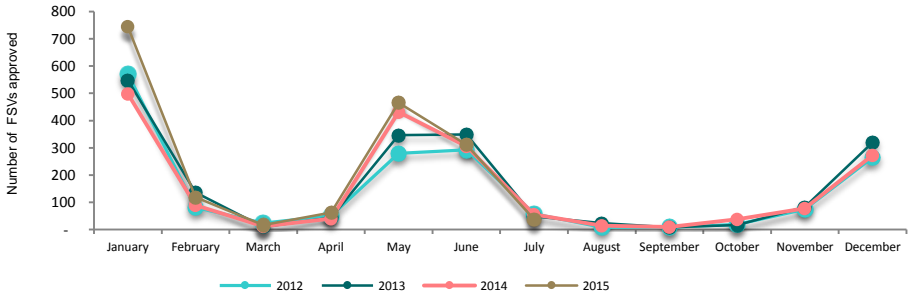
United States of America: Total student visas (TSV) 2012 - 2015



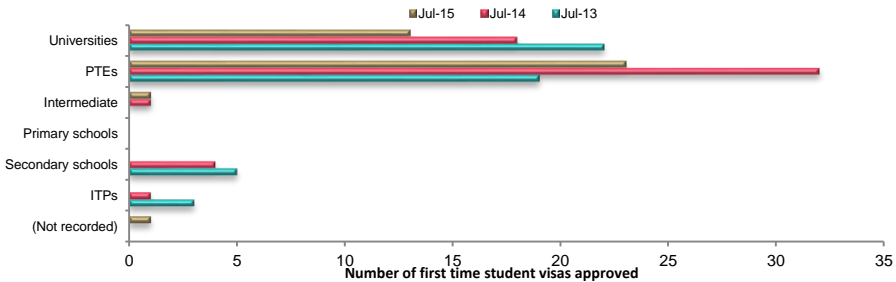
United States of America: First time student visas issued by sector, YTD



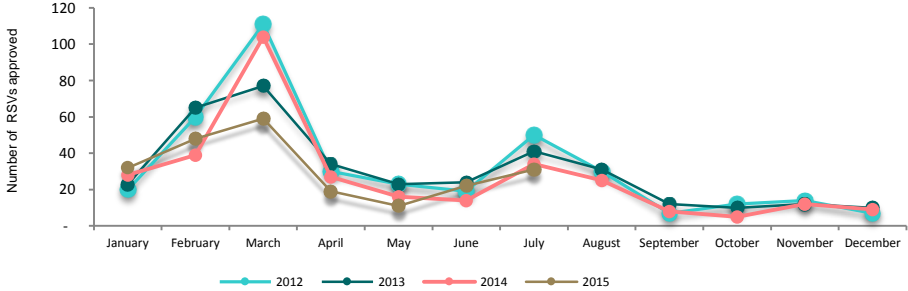
United States of America: First time student visas (FSV) 2012 - 2015



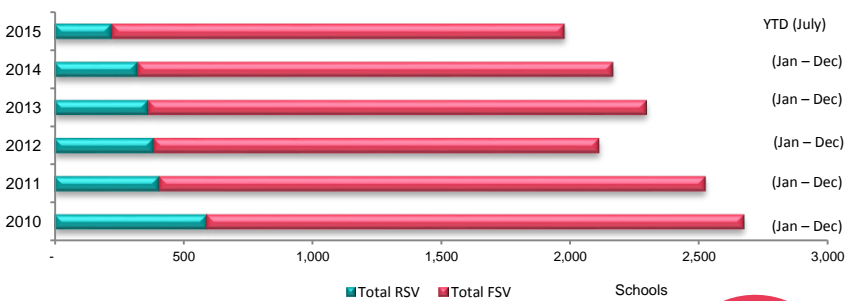
United States of America: First time student visas issued by sector, July



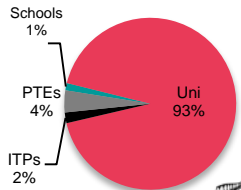
United States of America: Renewed student visas (RSV) 2012 - 2015



United States of America: Cumulative total for RSV vs. FSV 2010 - 2015



YTD 2015 sector breakdown of FSVs



## Takeaways:

- July saw the first month of TSV and FSV declines, down 32% and 23% respectively.
- However, even considering July's result YTD FSVs continue to track strongly, up 23% (324). TSVs are up 17% (284).

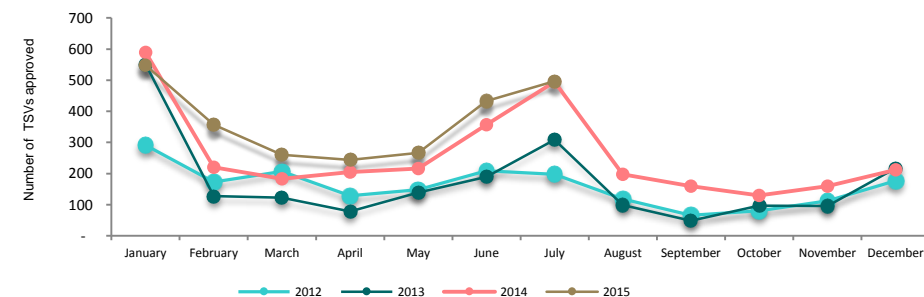
# Latin America:

YTD (January to July)

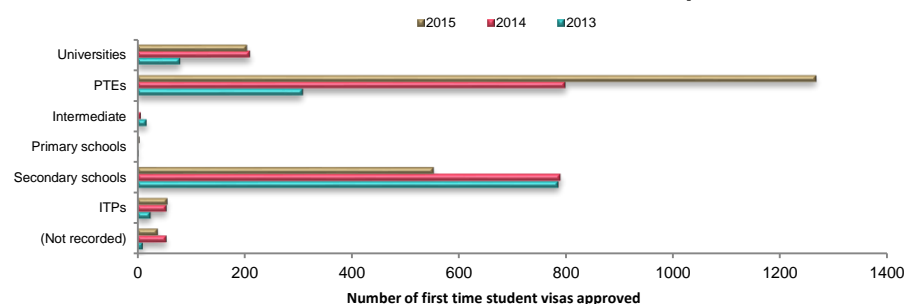
July RSV			July FSV		July TSV		
↑	14	19%	↓	-12	↑	2	0%

YTD RSV			YTD FSV		YTD TSV			
↑	132	38%	↑	209	11%	↑	341	15%

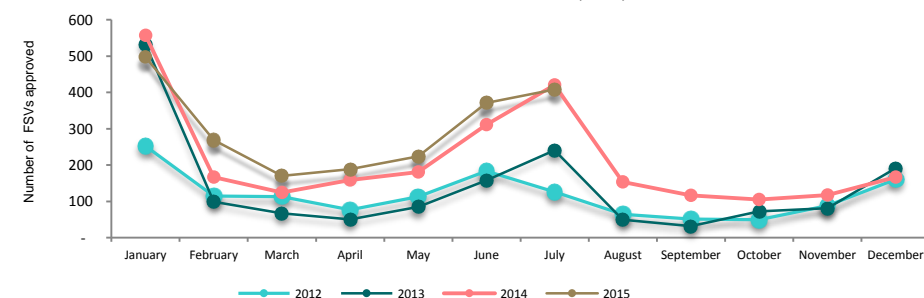
Latin America: Total student visas (TSV) 2012 - 2015



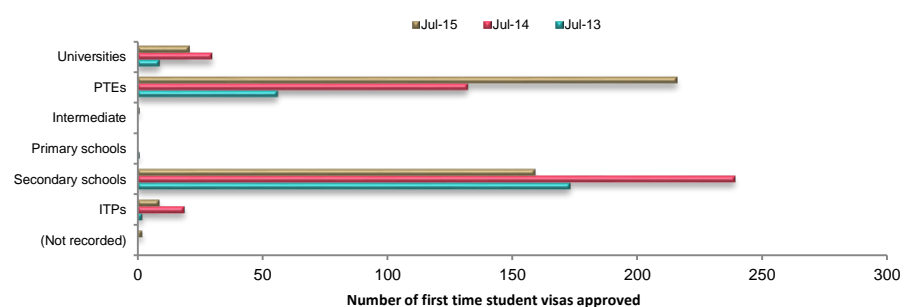
Latin America: First time student visas issued by sector, YTD



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



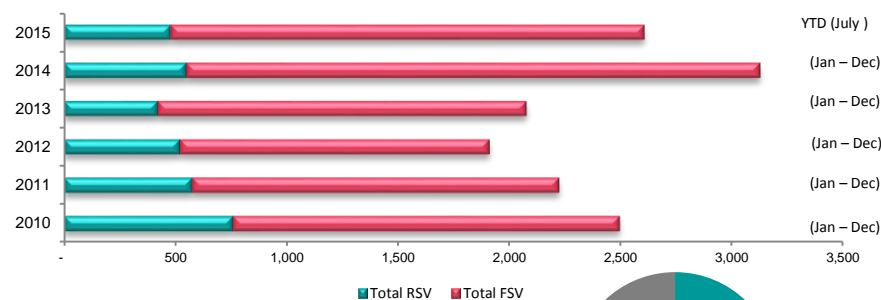
Latin America: First time student visas issued by sector, July



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



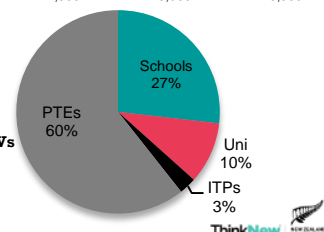
Latin America: Cumulative total for RSV vs. FSV 2010 - 2015



## Takeaways:

- This market has experienced significant growth in FSVs during 2015, especially within the PTE sector, up 59% (468). In contrast, secondary schools have shown a strong decline, down -30% (-237). This decline is driven by a decrease in the number of Chilean secondary school scholarship students.

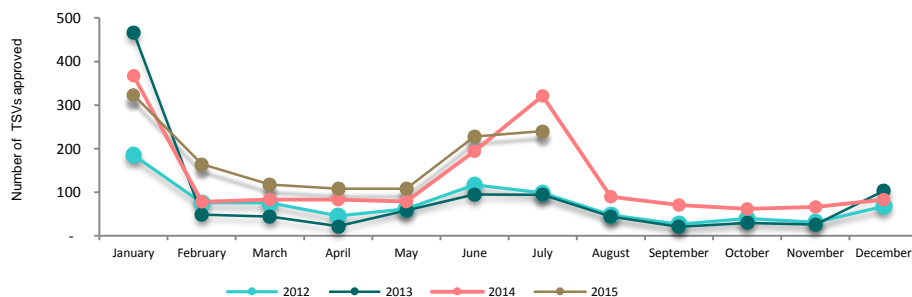
YTD 2015 sector breakdown of FSVs



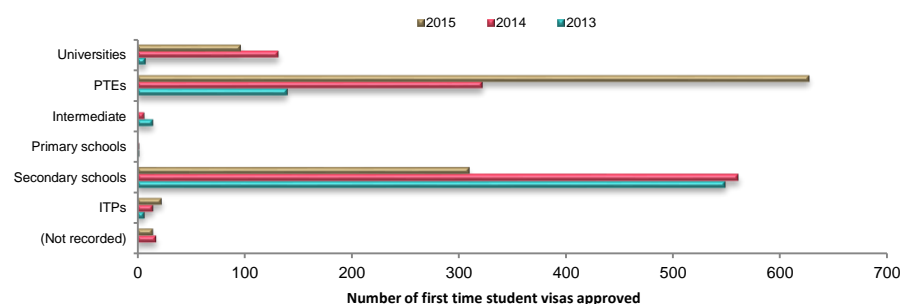
July RSV		July FSV		July TSV	
↓	-13	↓	-28%	↓	-81
	-28%		-25%		-25%

YTD RSV		YTD FSV		YTD TSV	
↑	68	↑	17	↑	85
	46%		2%		7%

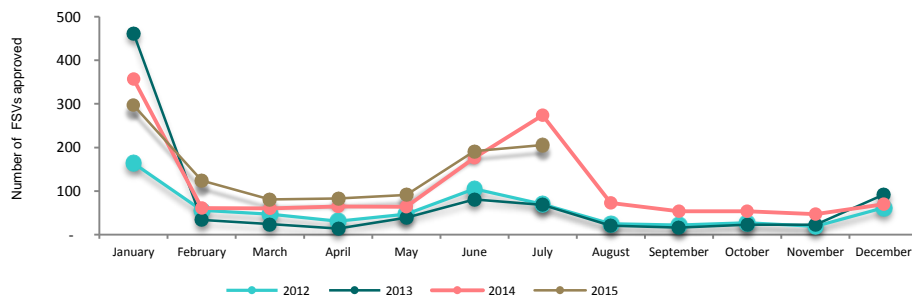
**Brazil: Total student visas (TSV) 2012 - 2015**



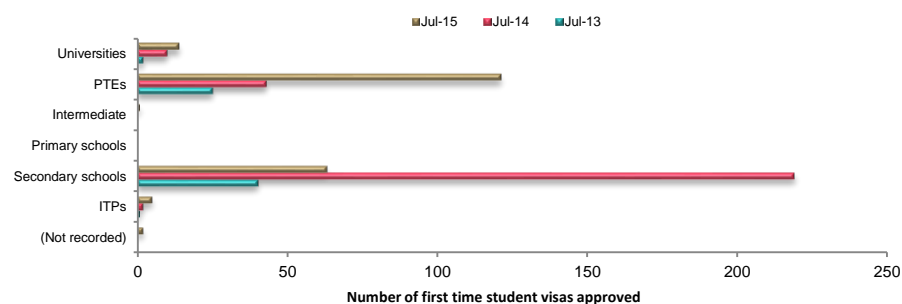
**Brazil: First time student visas issued by sector, YTD**



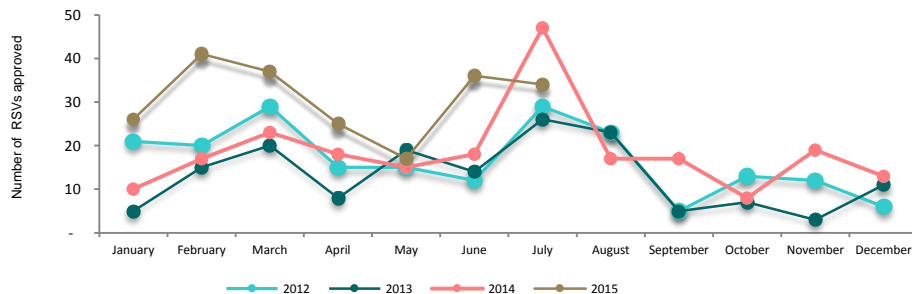
**Brazil: First time student visas (FSV) 2012 - 2015**



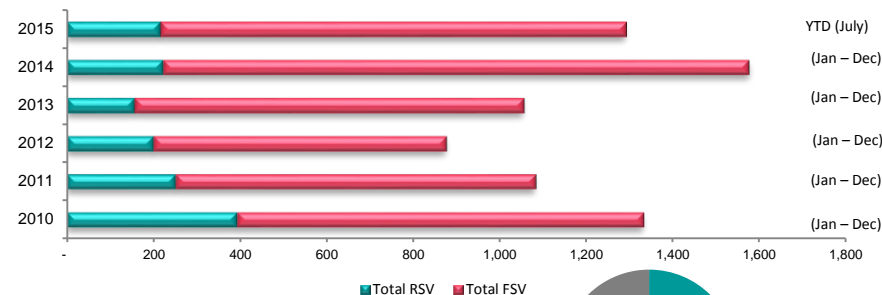
**Brazil: First time student visas issued by sector, July**



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



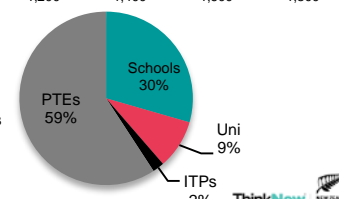
**Brazil: Cumulative total for RSV vs. FSV 2010 - 2015**



## Takeaways:

- Despite July declines in both RSVs and FSVs, the YTD TSV position for this market is positive, up 7% (85).
- The PTE sector has shown strong growth YTD, up 95% (305). In contrast the secondary school sector is down 45% (-251) 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**

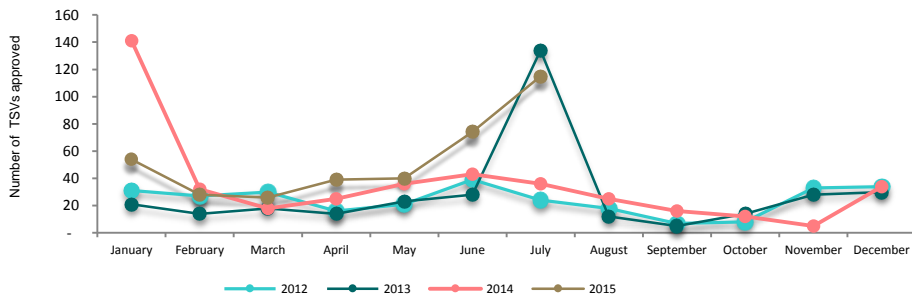




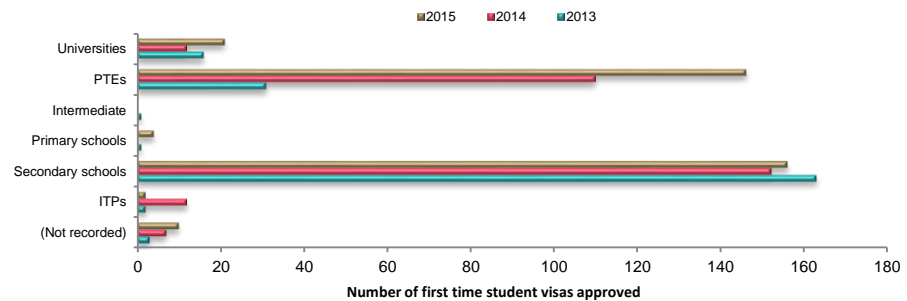
July RSV			July FSV		July TSV			
↓	-2	-22%	↑	81	300%	↑	79	219%

YTD RSV			YTD FSV		YTD TSV			
↓	-1	-3%	↑	46	16%	↑	45	14%

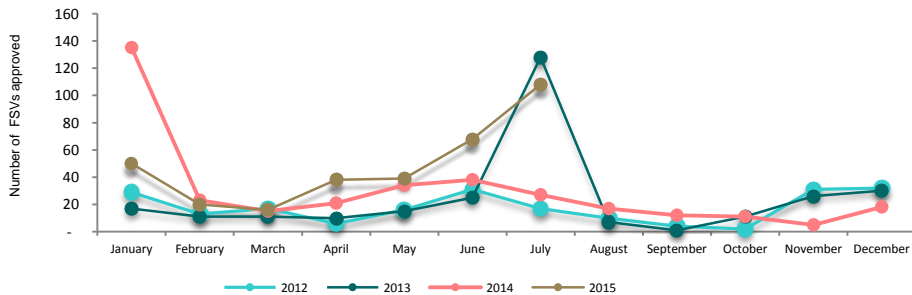
Chile: Total student visas (TSV) 2012 - 2015



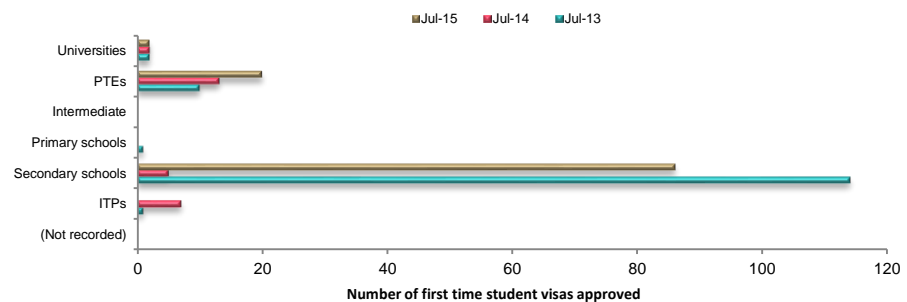
Chile: First time student visas issued by sector, YTD



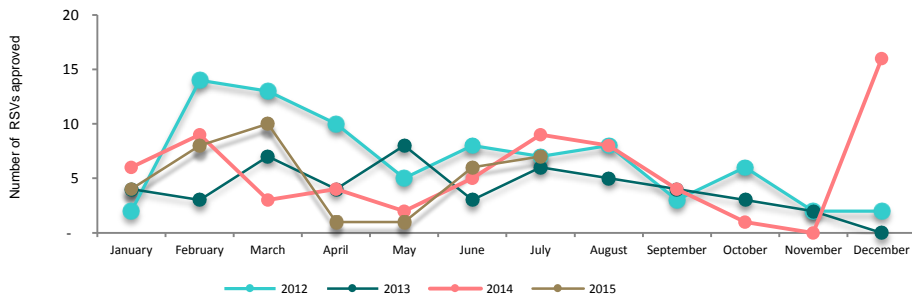
Chile: First time student visas (FSV) 2012 - 2015



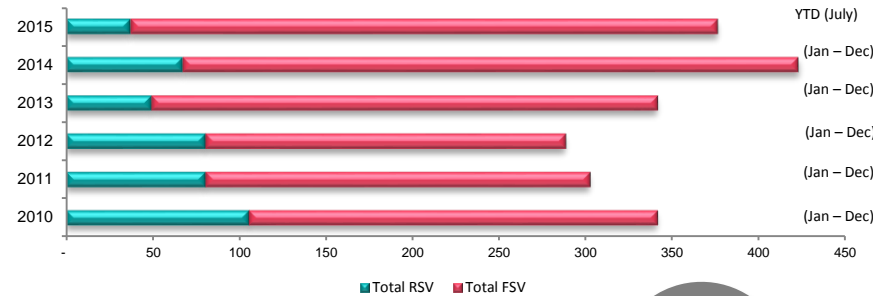
Chile: First time student visas issued by sector, July



Chile: Renewed student visas (RSV) 2012 - 2015



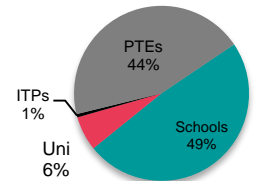
Chile: Cumulative total for RSV vs. FSV 2010 - 2015









## Takeaways:

- This market has experienced a growth in TSV approvals year to date (14%, 45). This growth has been driven by increases in FSVs (16%, 46).
- This growth has been primarily driven by the PTE sector (33%, 36).

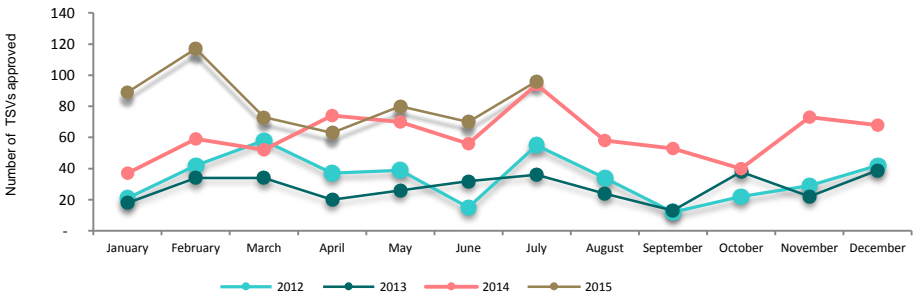
YTD 2015 sector  
breakdown of FSVs



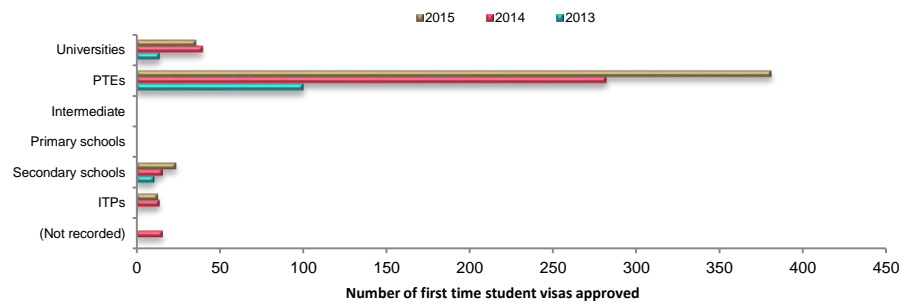
July RSV		July FSV		July TSV	
	24	240%		-22	-26%
	2	2%			

YTD RSV		YTD FSV		YTD TSV	
	60	81%		86	23%
	146	33%			

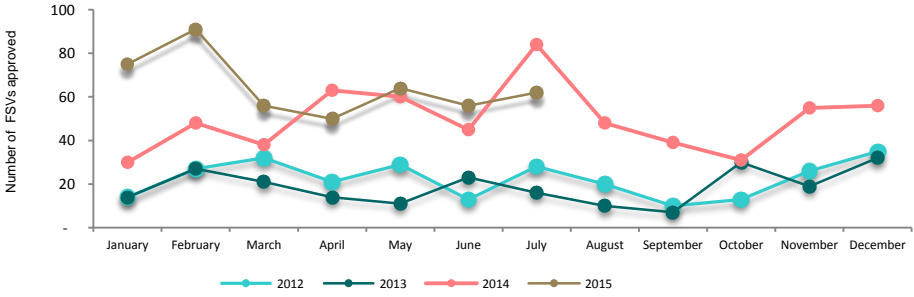
Colombia: Total student visas (TSV) 2012 - 2015



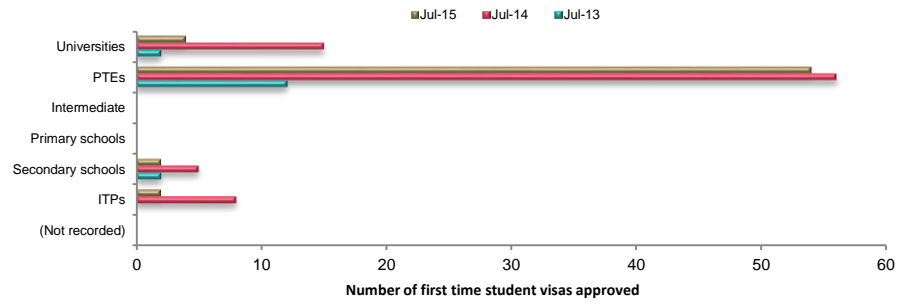
Colombia: First time student visas issued by sector, YTD



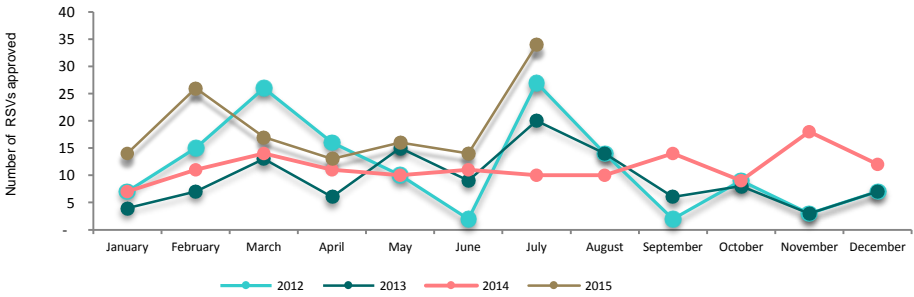
Colombia: First time student visas (FSV) 2012 - 2015



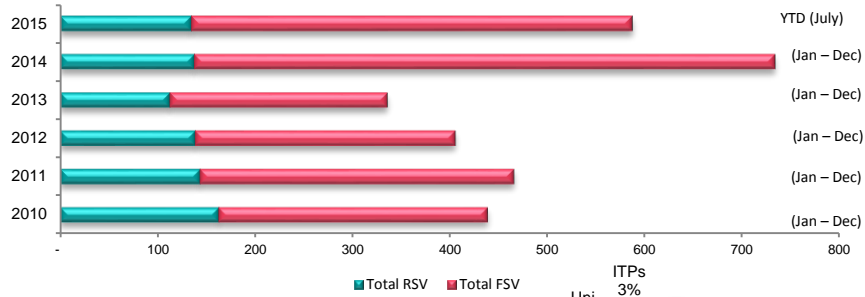
Colombia: First time student visas issued by sector, July



Colombia: Renewed student visas (RSV) 2012 - 2015

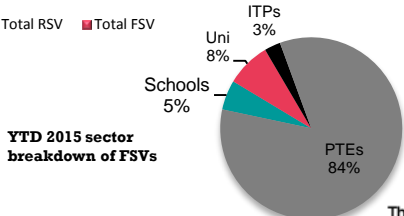


Colombia: Cumulative total for RSV vs. FSV 2010 - 2015



## Takeaways:

- This market has experienced significant growth, up 33% (146 TSVs) YTD.
- The PTE sector drove growth, up 35% (99) YTD.



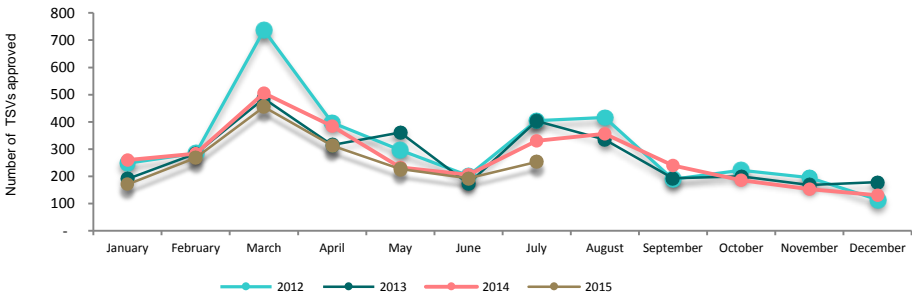
# Middle East:

YTD (January to July)

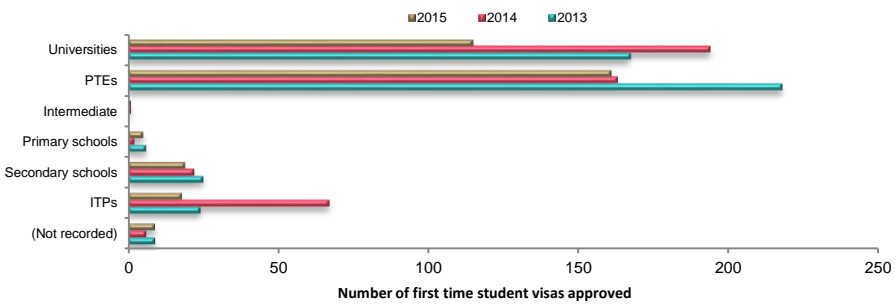
July RSV		July FSV		July TSV	
↓ -58	-21%	↓ -20	-34%	↓ -78	-24%

YTD RSV		YTD FSV		YTD TSV	
↓ -197	-11%	↓ -127	-28%	↓ -324	-15%

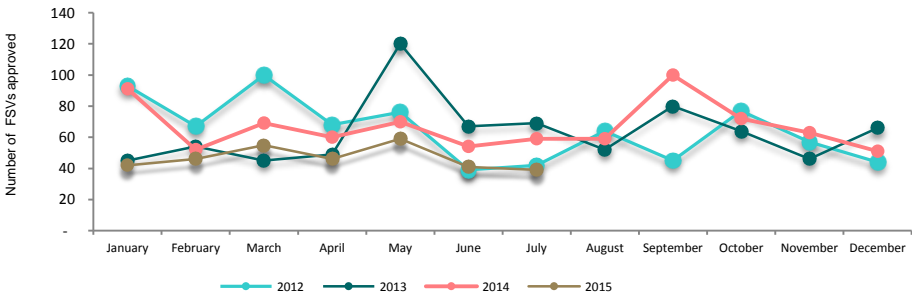
Middle East: Total student visas (TSV) 2012 - 2015



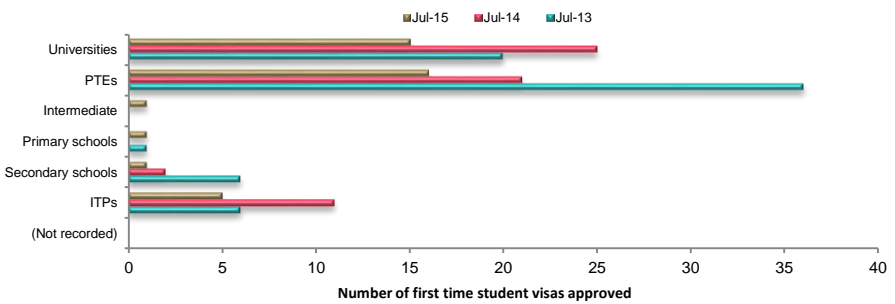
Middle East: First time student visas issued by sector, YTD



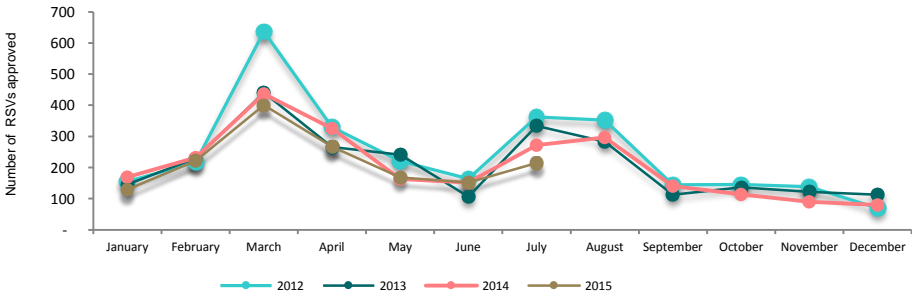
Middle East: First time student visas (FSV) 2012 - 2015



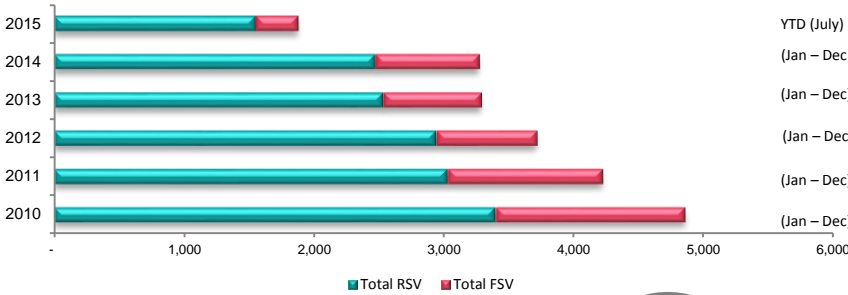
Middle East: First time student visas issued by sector, July



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



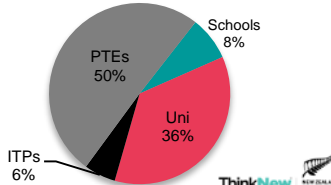
Middle East: Cumulative total for RSV vs. FSV 2010 - 2015



## Takeaways:

- This market continues to experience negative results.

YTD 2015 sector breakdown of FSVs



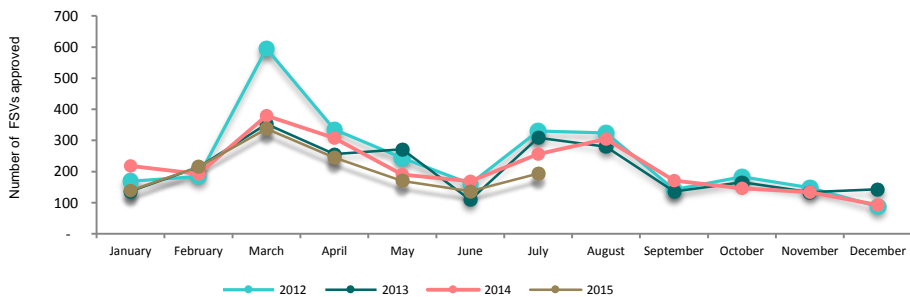
# Saudi Arabia:

YTD (January to July)

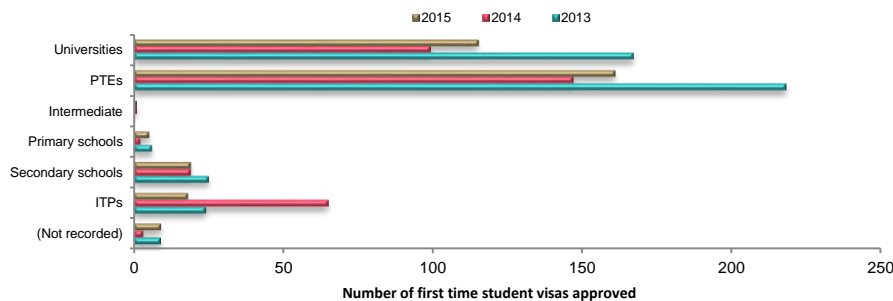
July RSV		July FSV		July TSV	
↓	-47	↓	-15	↓	-62
	-22%		-37%		-24%

YTD RSV		YTD FSV		YTD TSV	
↓ -165	-12%	↓ -113	-34%	↓ -278	-16%

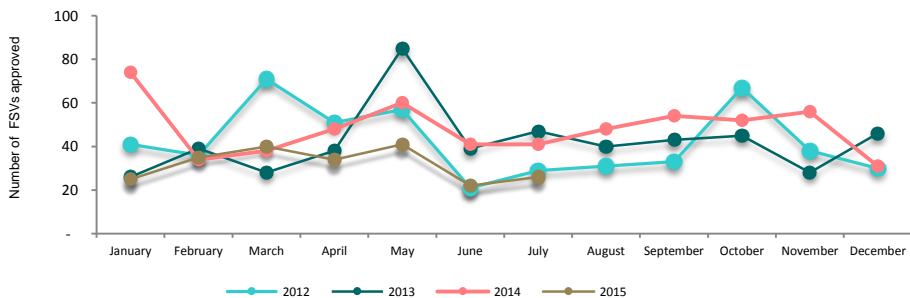
**Saudi Arabia: Total student visas approved 2012 - 2015 (TSV)**



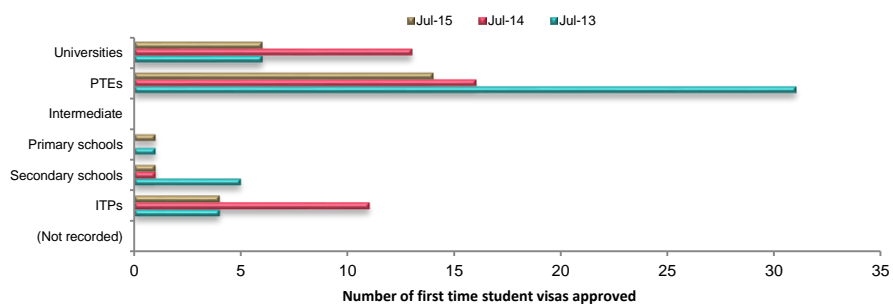
**Saudi Arabia: First time student visas issued by sector, YTD**



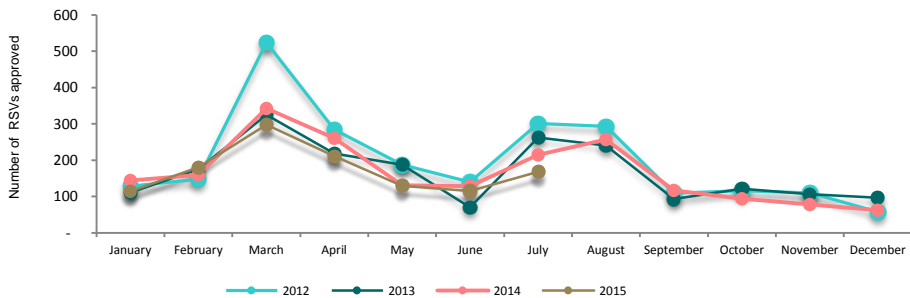
**Saudi Arabia: Total first time student visas approved (FSV) 2012 - 2015**



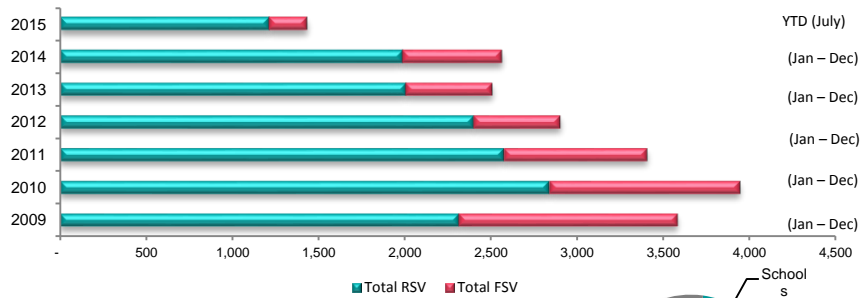
**Saudi Arabia: First time student visas issued by sector, July**



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



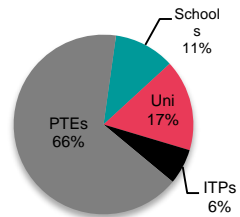
**Saudi Arabia: Cumulative total for RSV vs. FSV 2010 - 2015**









## Takeaways:

- This market continues to experience negative results.
- The decline is 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.

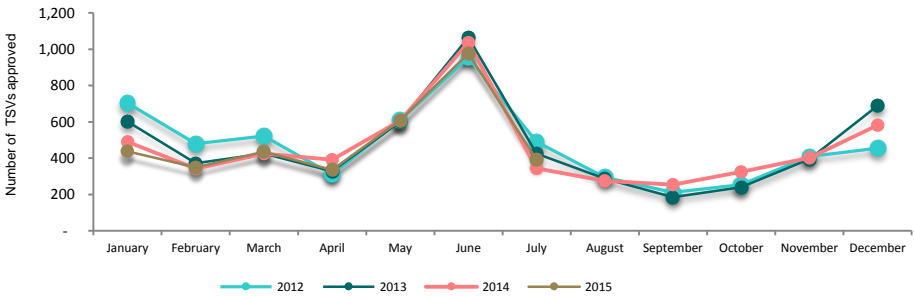
**YTD 2015 sector breakdown of FSVs**



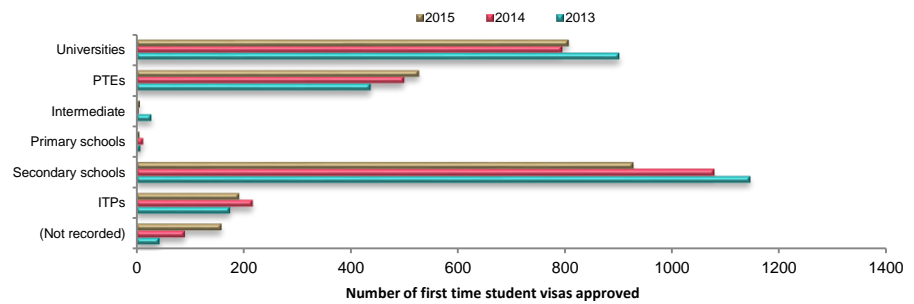
July RSV		July FSV		July TSV	
	-9		57		48
	-6%		30%		14%

YTD RSV		YTD FSV		YTD TSV	
	-27		-72		-99
	-3%		-3%		-3%

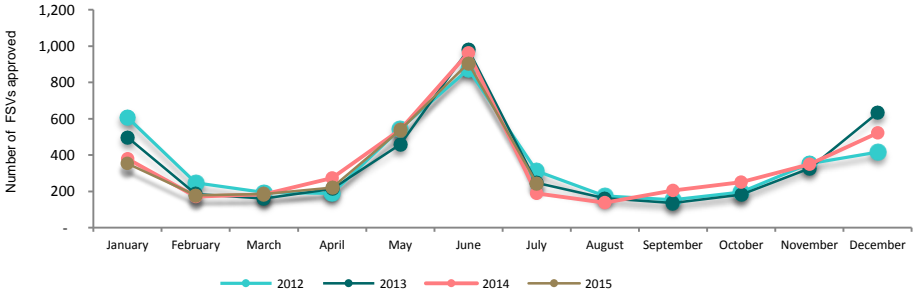
Europe: Total student visas (TSV) 2012 - 2015



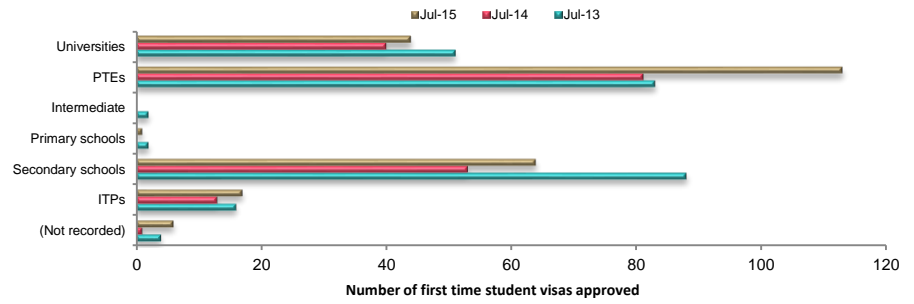
Europe: First time student visas issued by sector, YTD



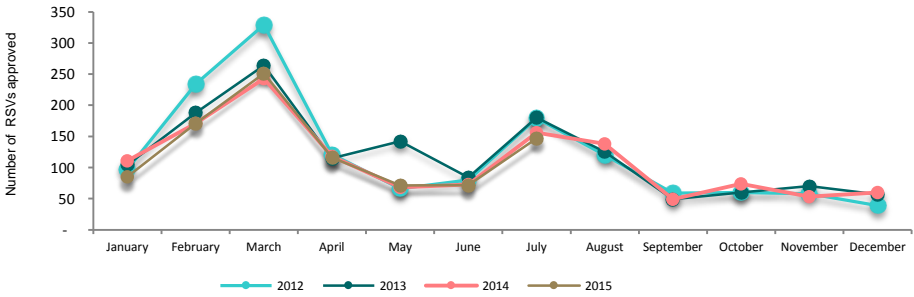
Europe: First time student visas (FSV) 2012 - 2015



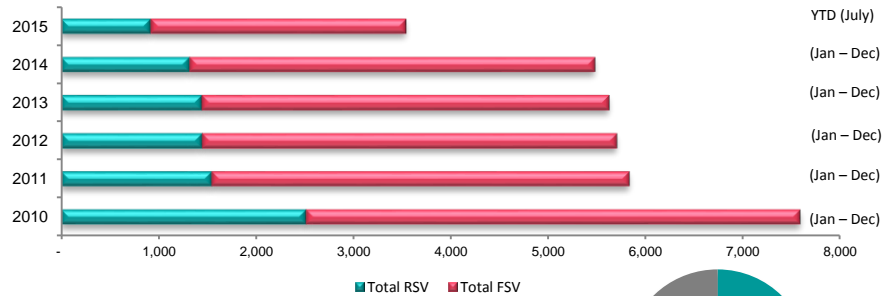
Europe: First time student visas issued by sector, July



Europe: Renewed student visas (RSV) 2012 - 2015



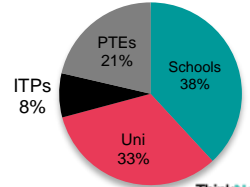
Europe: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:




- TSVs are down 3% YTD (-99).
- July experienced strong growth in FSVs, up 30% (57).




YTD 2015 sector breakdown of FSVs



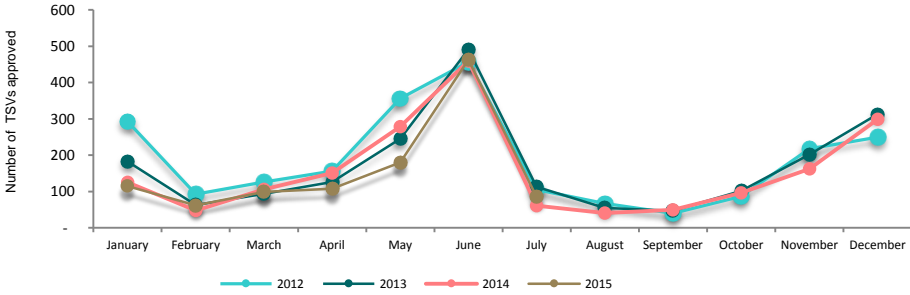
# Germany:

YTD (January to July)

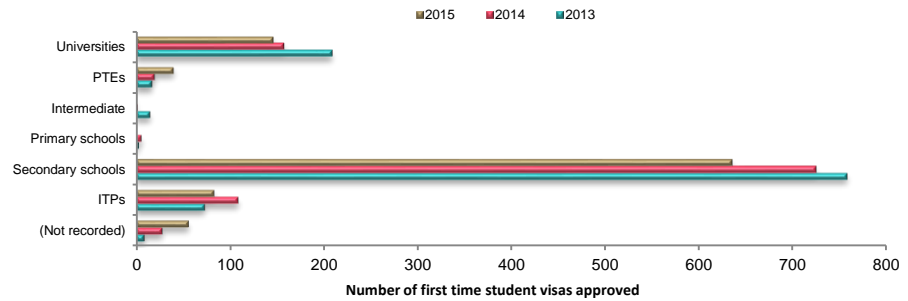
July RSV		July FSV		July TSV	
	-4		29		25
-15%		85%		41%	

YTD RSV		YTD FSV		YTD TSV	
	-30		-86		-116
-17%		-8%		-9%	

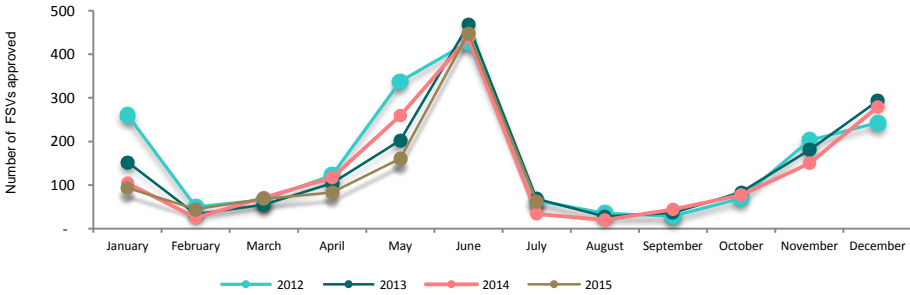
Germany: Total student visas (TSV) 2012 - 2015



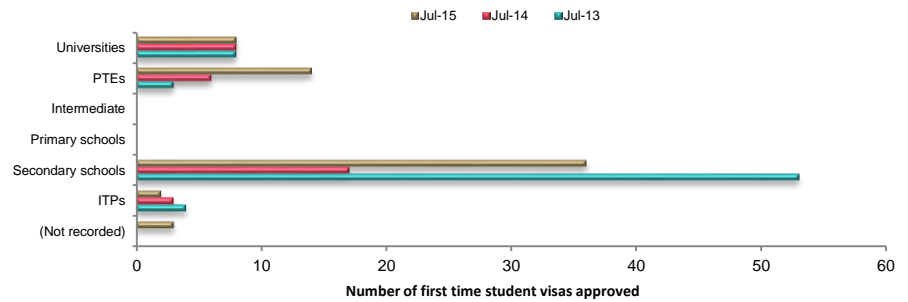
Germany: First time student visas issued by sector, YTD



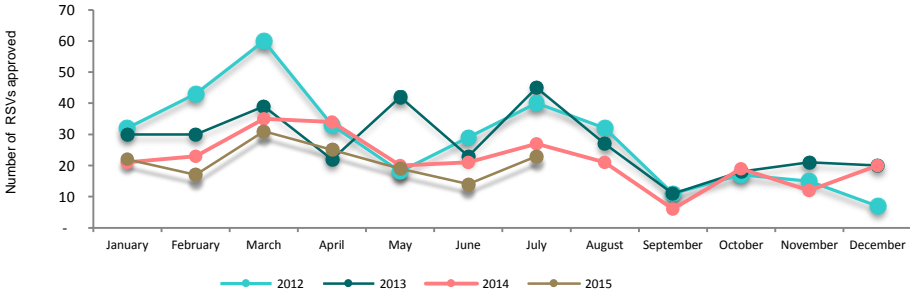
Germany: First time student visas (FSV) 2012 - 2015



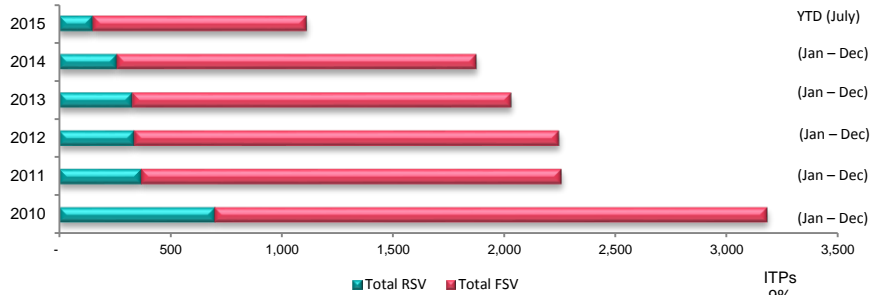
Germany: First time student visas issued by sector, July



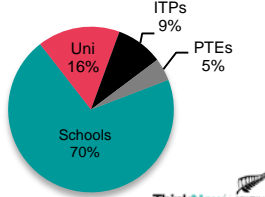
Germany: Renewed student visas (RSV) 2012 - 2015



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.
- However, July was a strong month for FSVs, up 85% (29).



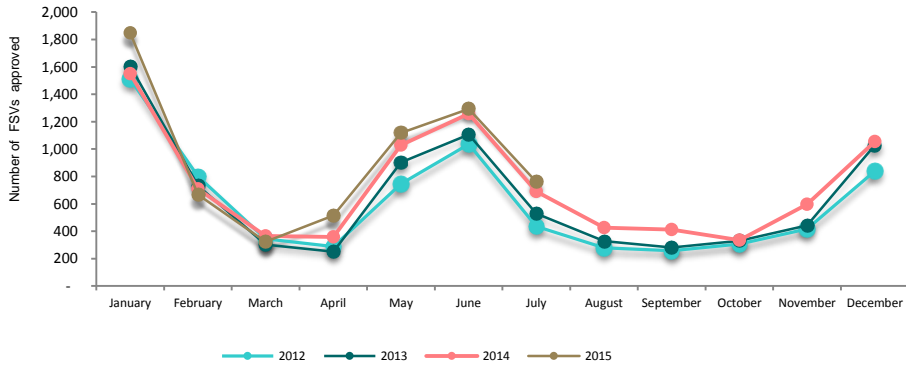
# Overall: Sector overview



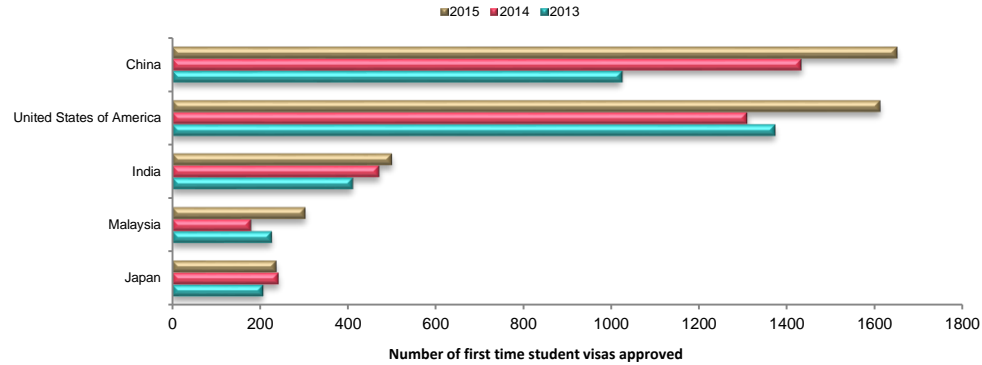
# University:

July FSV		YTD FSV	
↑ 70	10%	↑ 559	9%

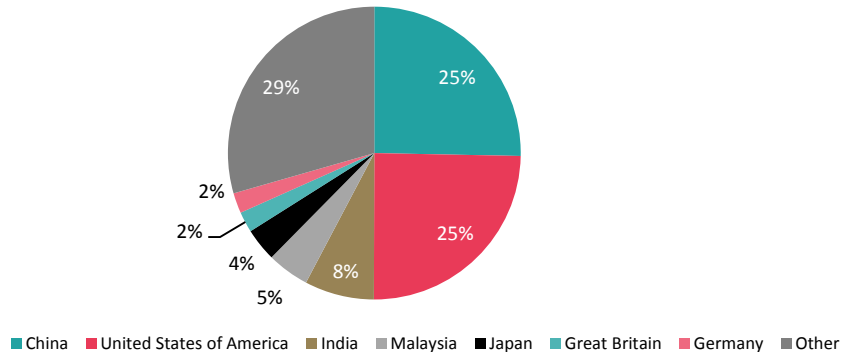
University: Total first time student visas (FSV) 2012 - 2015



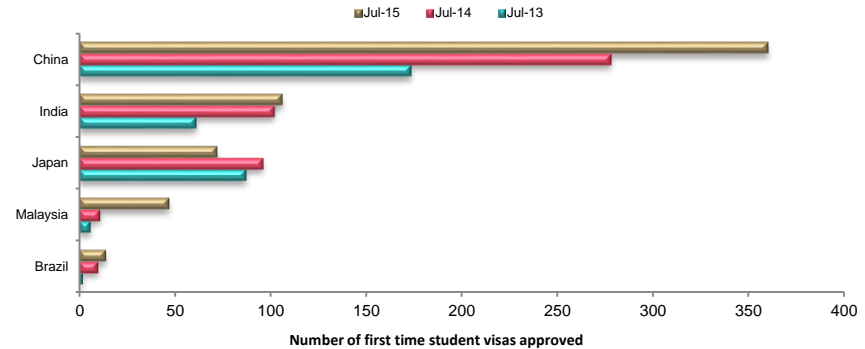
University: First time student visas issued by country, YTD



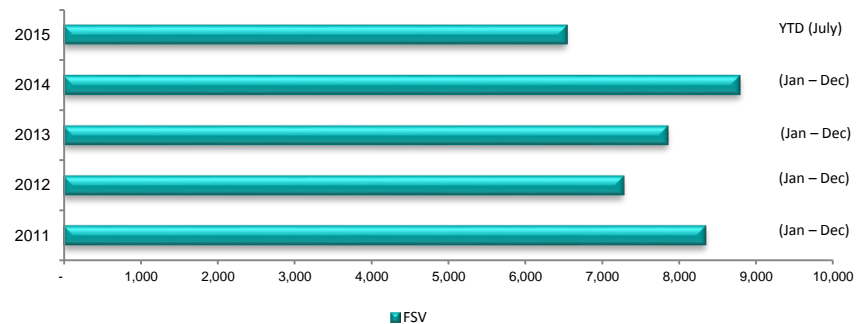
YTD 2015 country breakdown of FSVs



University: First time student visas issued, July



University: Cumulative total FSV 2011 - 2015



## Takeaways:

- The university sector has grown steadily throughout 2015, with FSVs up 9% (559).
- This growth was driven by the USA, China, and Malaysia, up 303, 218, and 124 FSVs.
- Together, USA and China account for 50% of all university FSV approvals YTD.

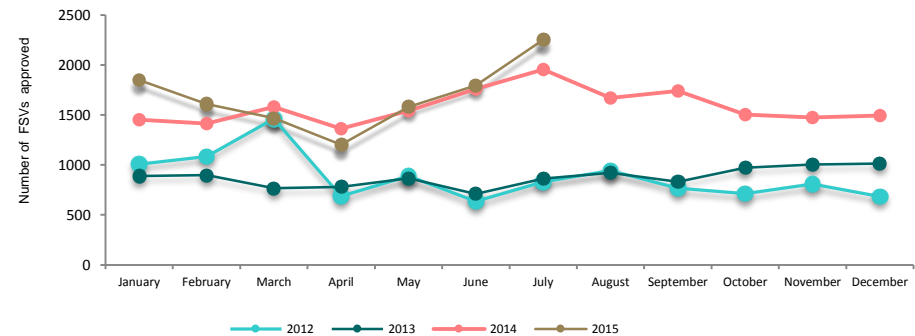
# Private Training Establishments (PTE):



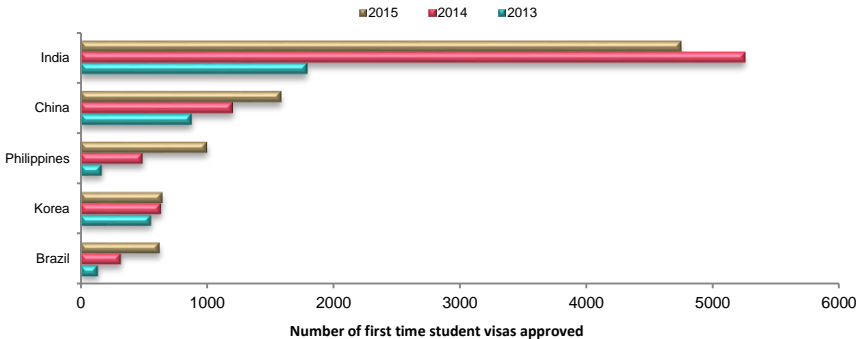
YTD (January to July)

July FSV		YTD FSV	
↑ 297	15%	↑ 686	6%

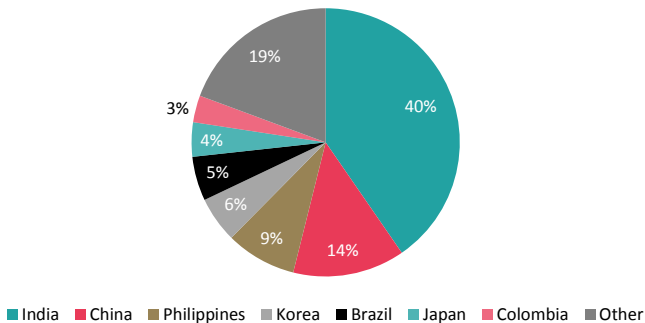
PTEs: Total first time student visas (FSV) 2012 - 2015



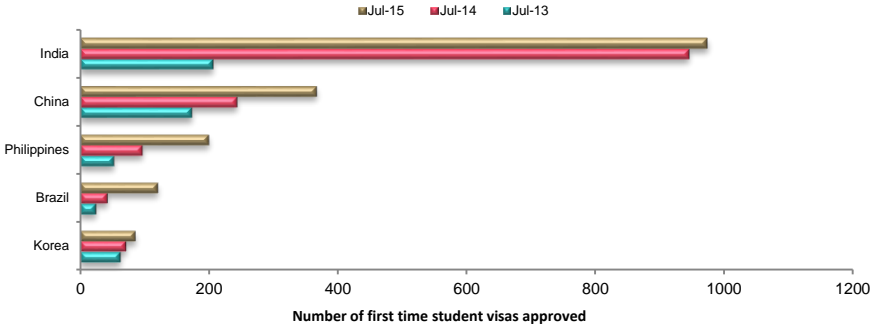
PTEs: First time student visas issued by country, YTD



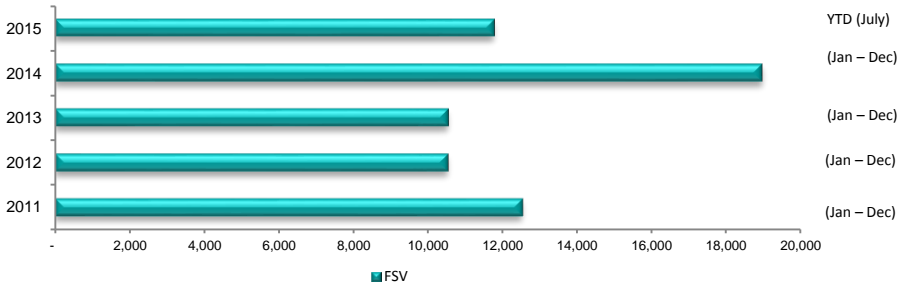
YTD 2015 country breakdown of FSVs



PTEs: First time student visas issued, July



PTEs: Cumulative total FSV 2011 - 2015



## Takeaways:

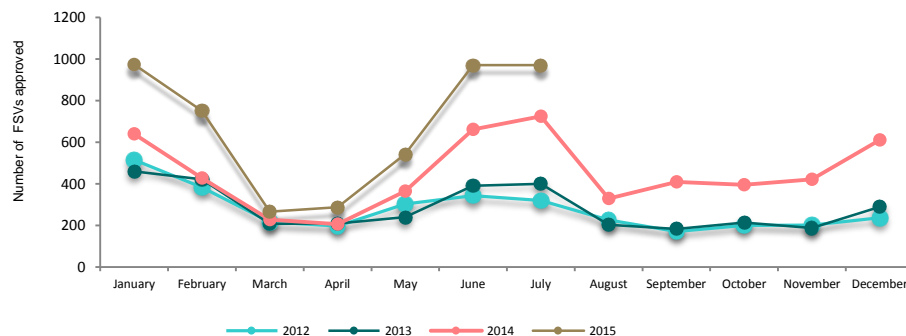
- Following a strong finish to 2014, 2015 is also tracking positively up 6% (686).
- Declines from the Indian market has slowed overall growth.

# Institutes of Technology and Polytechnics (ITPs):

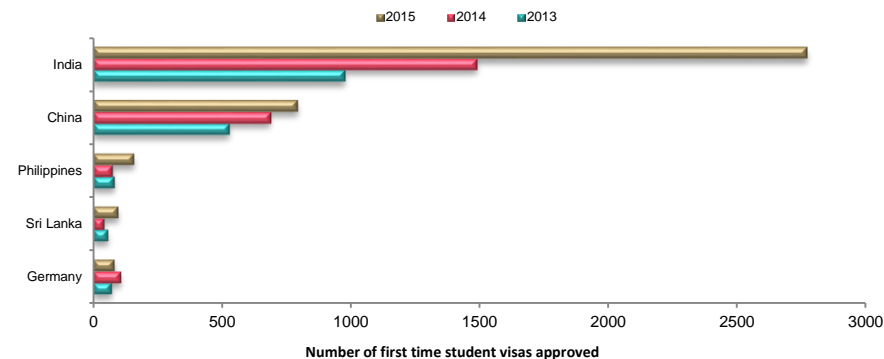
YTD (January to July)

July FSV		YTD FSV	
↑	245	↑	1,509
	34%		46%

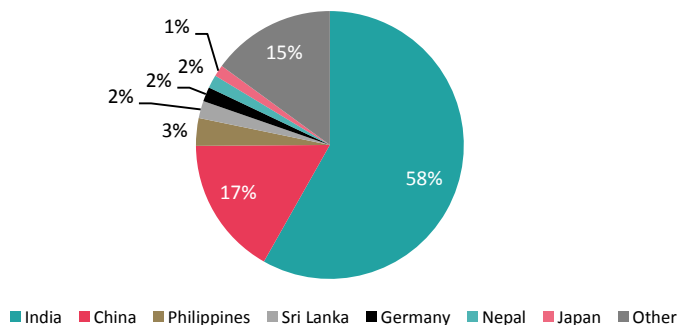
**ITPs: Total first time student visas (FSV) 2012 - 2015**



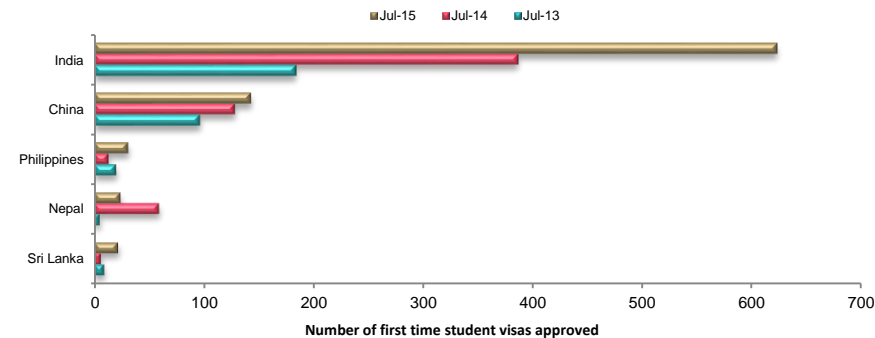
**ITPs: First time student visas issued by country, YTD**



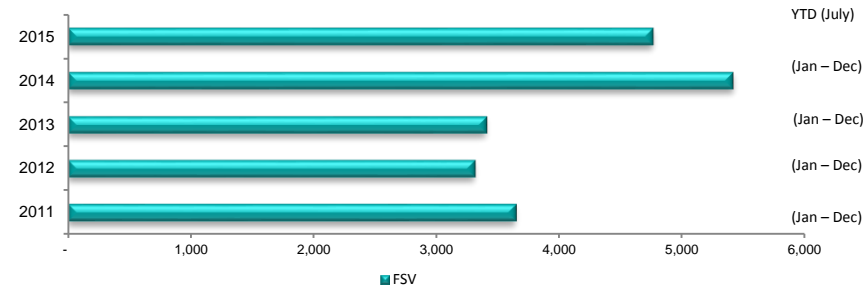
**YTD 2015 country breakdown of FSVs**



**ITPs: First time student visas issued, July**





**ITPs: Cumulative total FSV 2011 - 2015**



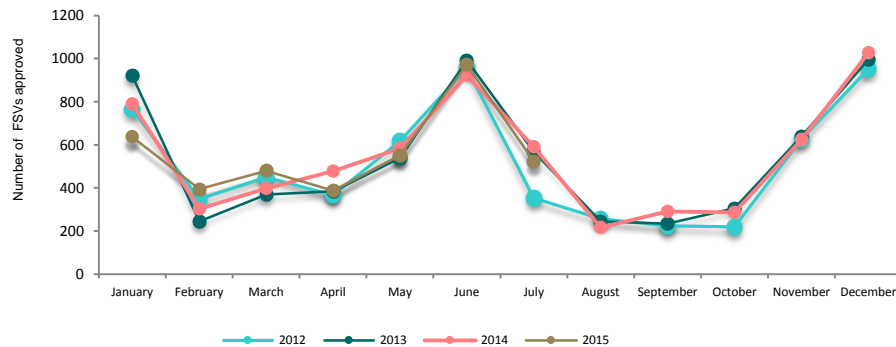
## Takeaways:

- After experiencing a strong 2014, the ITP sector has continued to see strong growth, up 46% (1509) YTD.
- This growth was driven by the Indian market which represents 58% of all FSVs approved YTD.

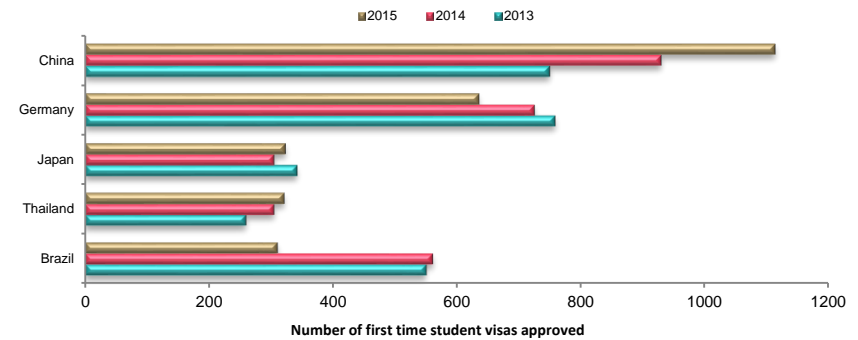
# Secondary schools:

July FSV		YTD FSV	
	-67		-3%
	-11%		-122

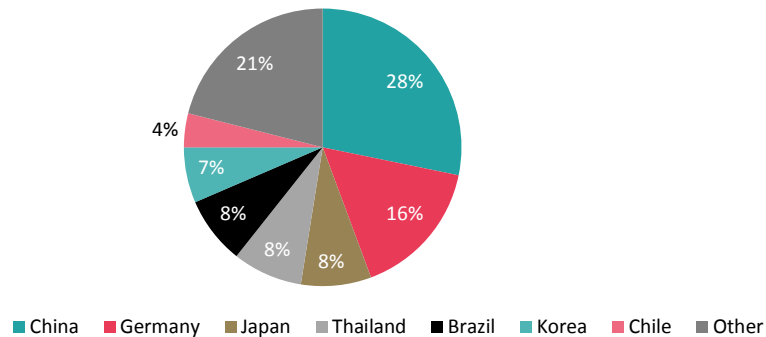
Secondary school: Total first time student visas (FSV) 2012 - 2015



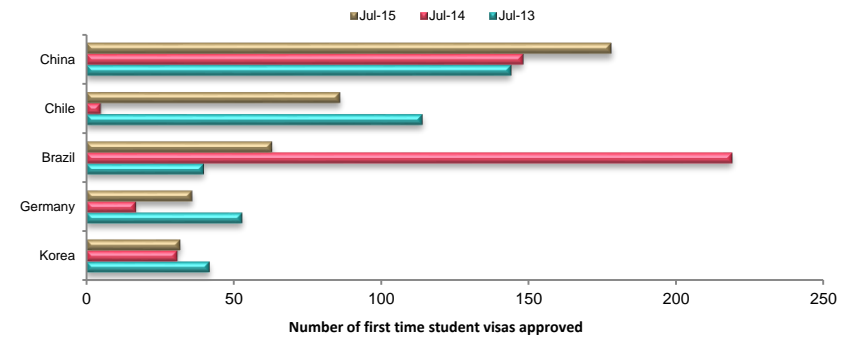
Secondary schools: First time student visas issued by country, YTD



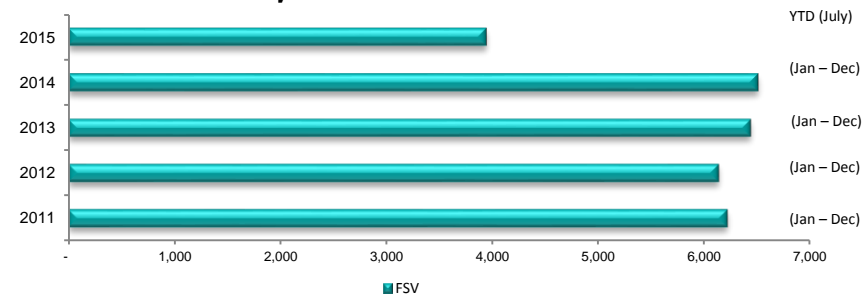
YTD 2015 country breakdown of FSVs



Secondary schools: First time student visas issued, July



Secondary school: Cumulative total FSV 2011 - 2015

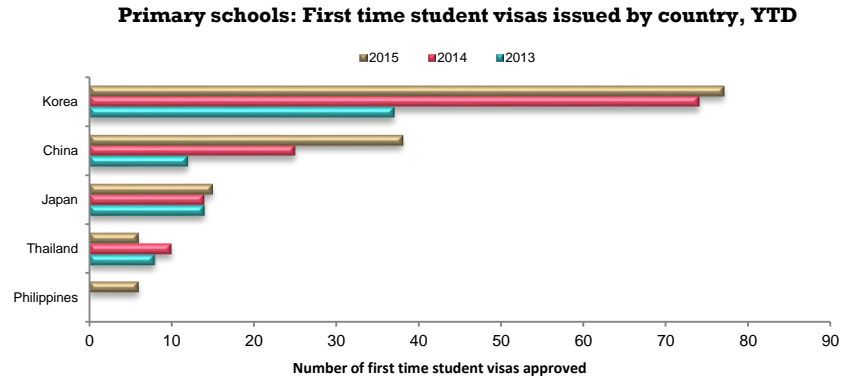
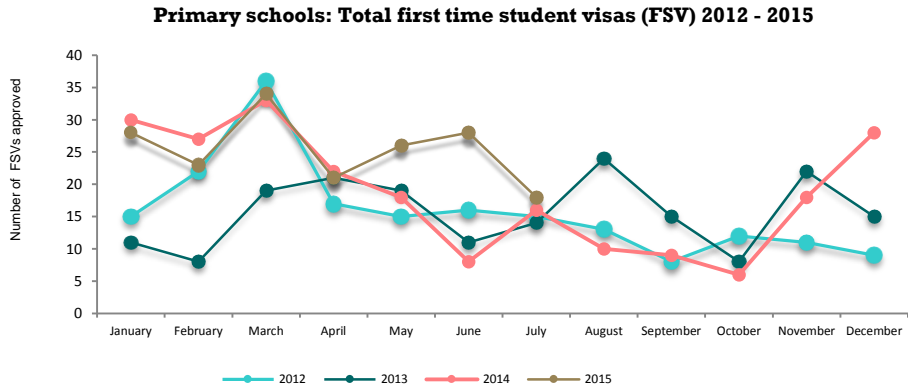


## Takeaways:

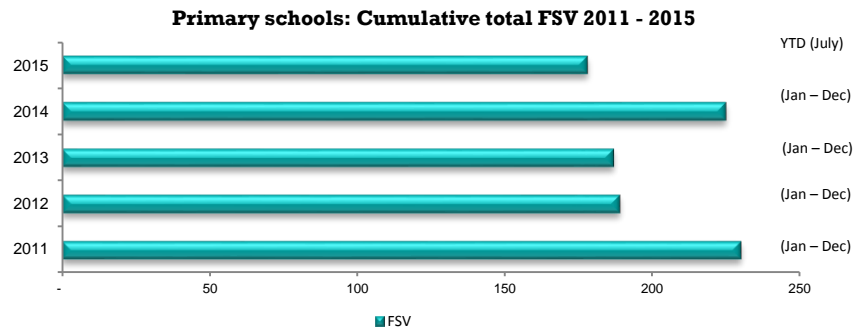
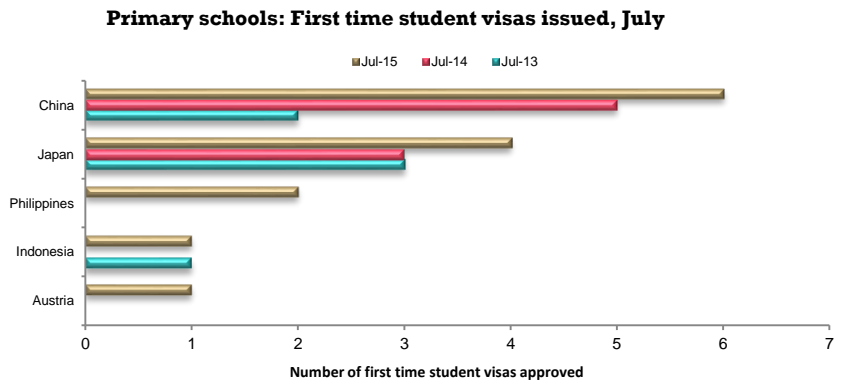
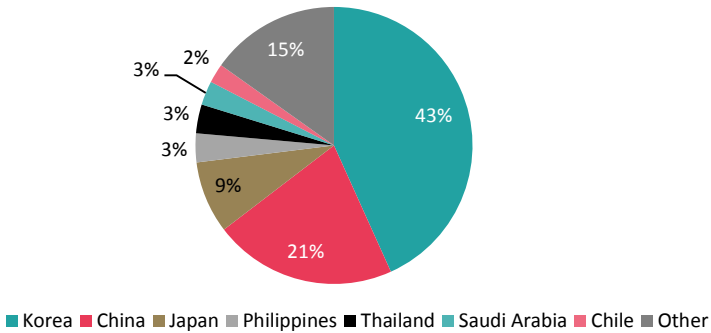
- This sector is in a negative position YTD 2015, down 3% (-122), which was driven by a loss in scholarship students from Latin America in January.
- July also showed a weak result, with first time visas down 11% (-67).
- This drop in secondary school students is primarily driven by Brazil.

# Primary schools:

July FSV		YTD FSV	
↑ 2	13%	↑ 24	16%



**YTD 2015 country breakdown of FSVs**





## Takeaways:

- The primary school sector is up 16% (24) YTD. The growth in the Primary school sector is driven by Korea and China.

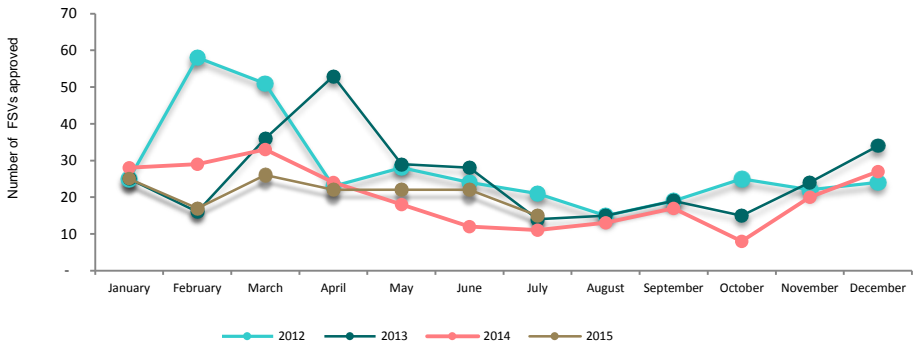


# Intermediate schools:

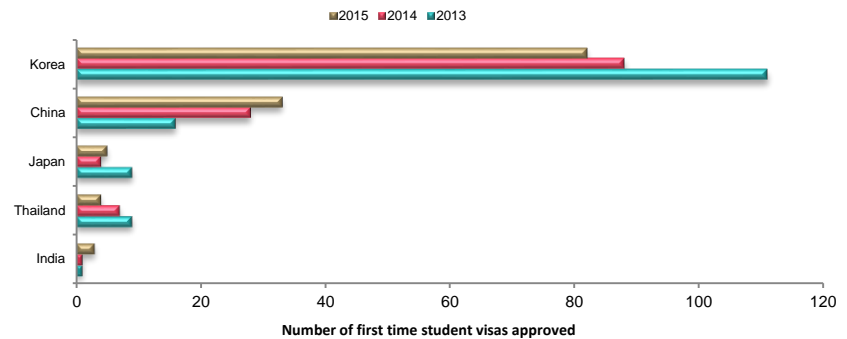
YTD (January to July)

July FSV		YTD FSV	
 4	36%	 -6	-4%

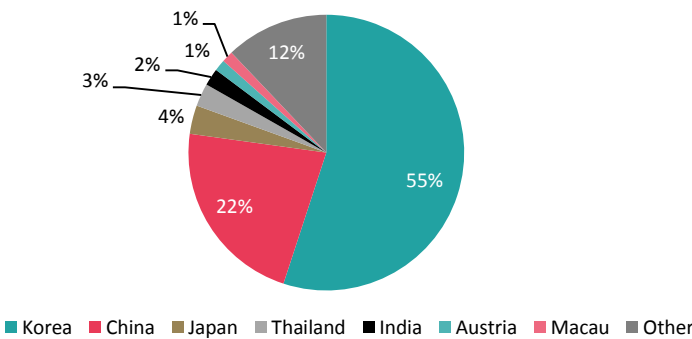
Intermediate: Total first time student visas (FSV) 2012 - 2015



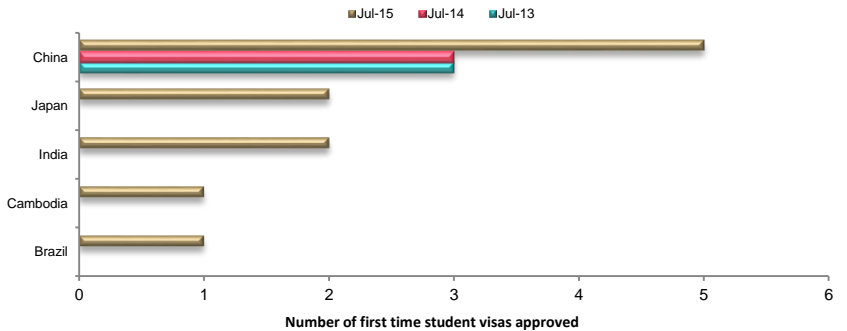
Intermediate: First time student visas issued by country, YTD



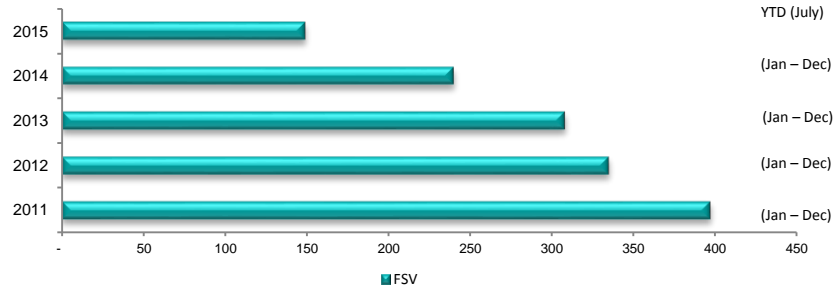
YTD 2015 country breakdown of FSVs



Intermediate: First time student visas issued, July



Intermediate: Cumulative total FSV 2011 - 2015



Takeaways:

- This sector has experienced a 4% decline YTD.