

Student Visa Dashboard

June 2015

Overall:

Market and sector overview



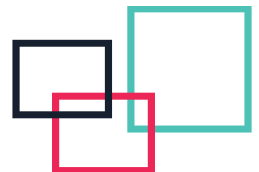
Introduction

- *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 (ie: 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. Dashboards prior to the May 2015 include approvals from "all" applicants, including dependants.
- Work in progress:
 - ENZ is currently working on:
 - Understanding the true demand of student visas – ie: 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

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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%

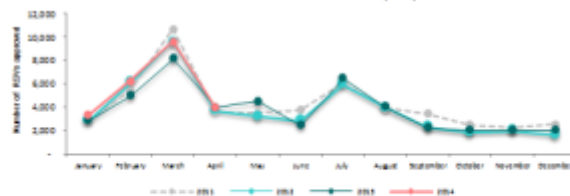
Overall: Total student visas (TSV) 2011 - 2014



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



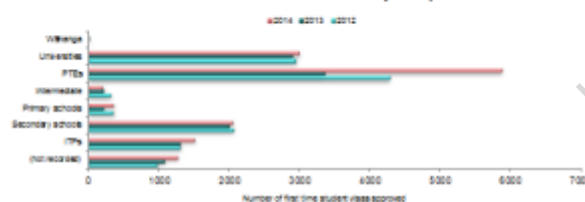
Overall: Renewed student visas (RSV) 2011 - 2014



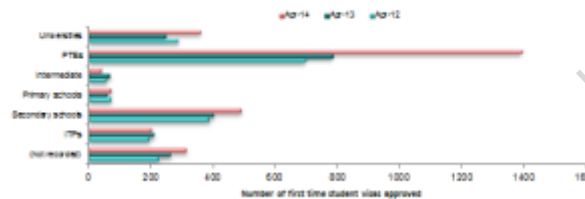
Takeaways:

- 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

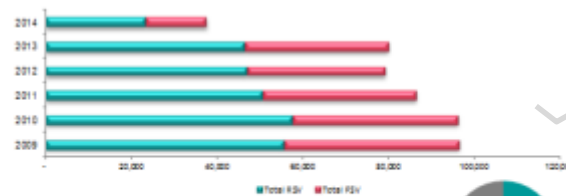
Overall: First time student visas issued by sector, YTD



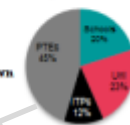
Overall: First time student visas issued by sector, April



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.

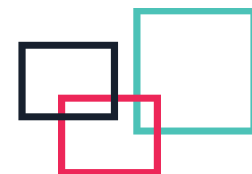
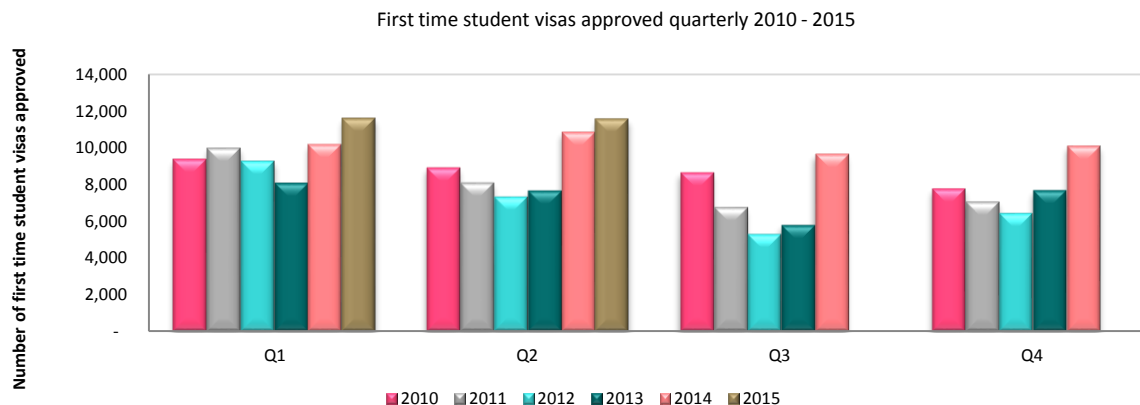
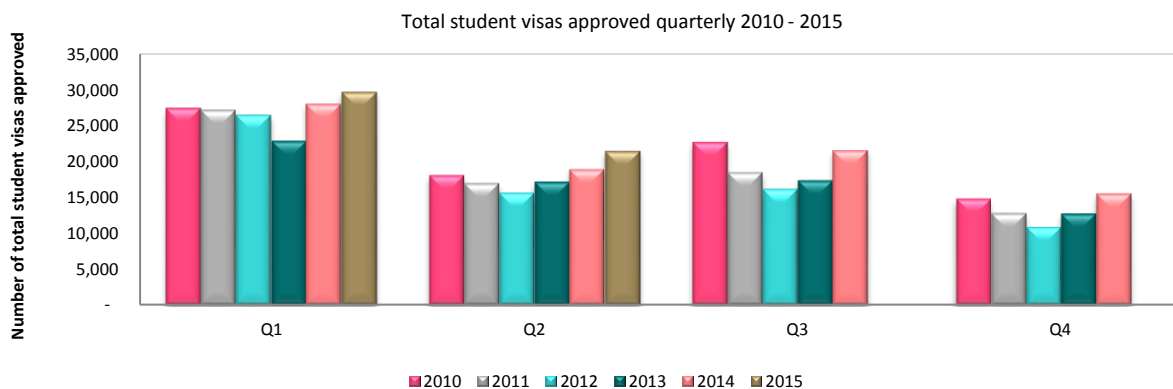
Shows the calendar year results for FSV + RSVs. This also demonstrates the proportional make-up of a market as we progress through the year, while comparing the overall result from previous years.

Key trends

Year-to-date and Q2

Year-to-date (YTD)

- Year-to-date total student visas (TSV) are up 10% (4,090) and first time student visas (FSV) up 10% (2,195). Returning student visas were also up 7% (1,895).
- YTD growth has been driven by China, India, the Philippines, USA and Brazil.
- The ITP, universities, and PTE sectors have experienced the strongest YTD growth up 50% (1276), 9% (491) and 4% (390).
- Q2 2015 saw strong growth in TSVs up 13% (2,507) and 7% (751) in FSVs, when compared to Q2 2014.



Key trends

June 2015

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June:

- June saw a 15% (1049) TSV growth and an 11% (516) FSV growth on June 2014.
- The growth was driven by China, India, the Philippines, Malaysia, and Korea.
- All sectors experienced growth.

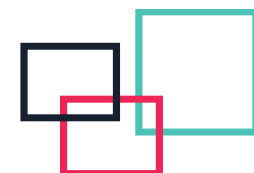
TSVs for June	Change	% change
China	403	21%
India	375	23%
Philippines	102	68%
Korea	88	35%
Malaysia	86	125%

France	-13	-15%
Denmark	-13	-22%
Netherlands	-14	-61%
Saudi Arabia	-37	-21%
Nepal	-91	-65%

FSVs for June	Change	% change
China	171	20%
India	141	12%
Philippines	122	111%
Malaysia	89	247%
Korea	63	48%

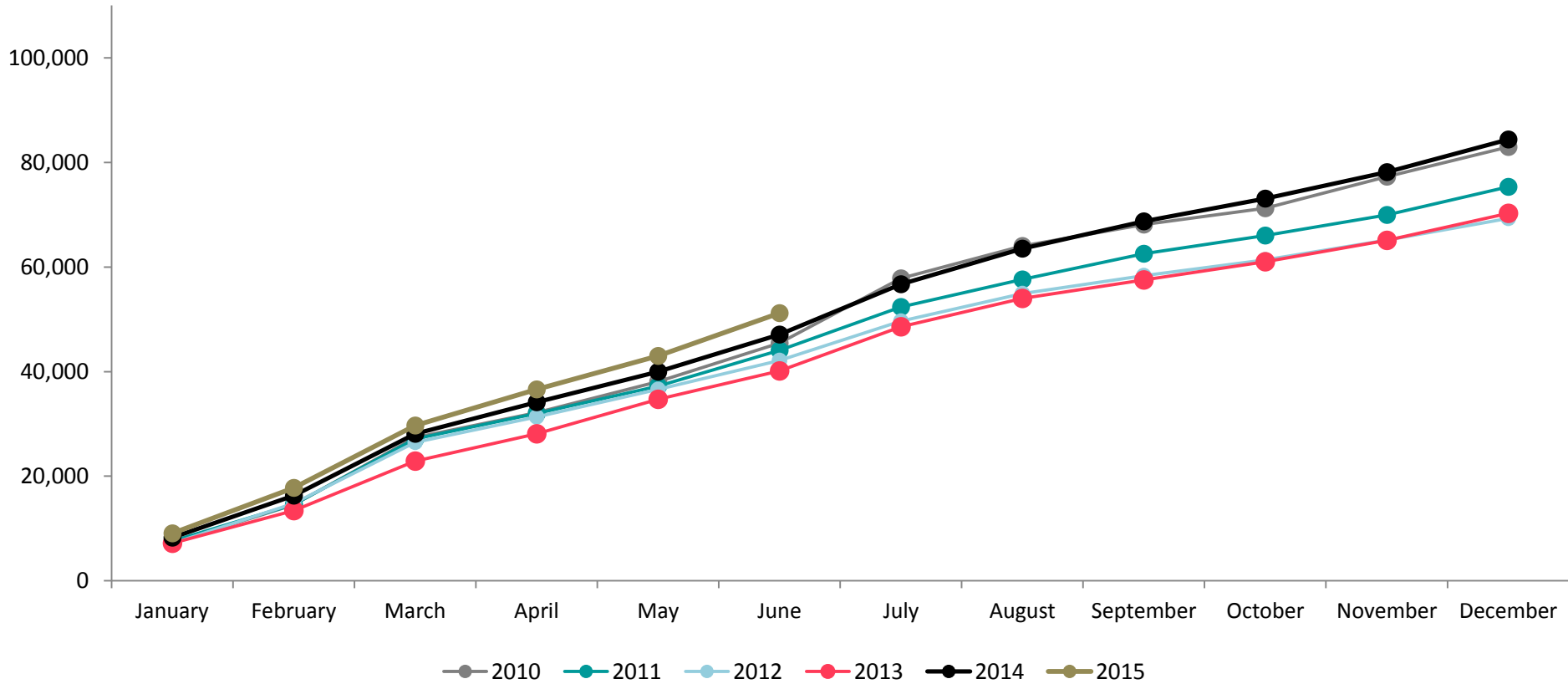
Nepal	-107	-80%
Saudi Arabia	-21	-49%
Norway	-14	-20%
France	-12	-15%
Denmark	-12	-21%

Sector FSVs for June	Change	% change
ITPs	319	48%
PTEs	49	3%
Secondary schools	47	5%
Universities	37	3%
Primary	19	158%
Intermediate	10	77%



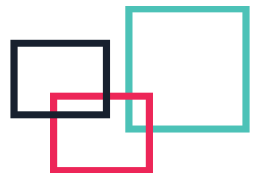
Tracker: Cumulative total

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Takeaways:

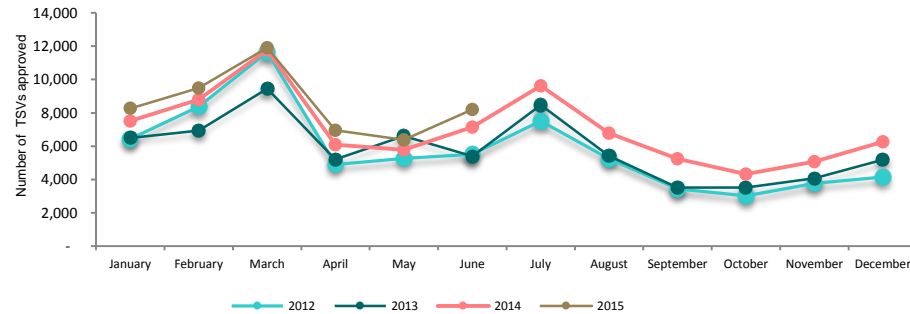
- 2015 is currently tracking above previous years.



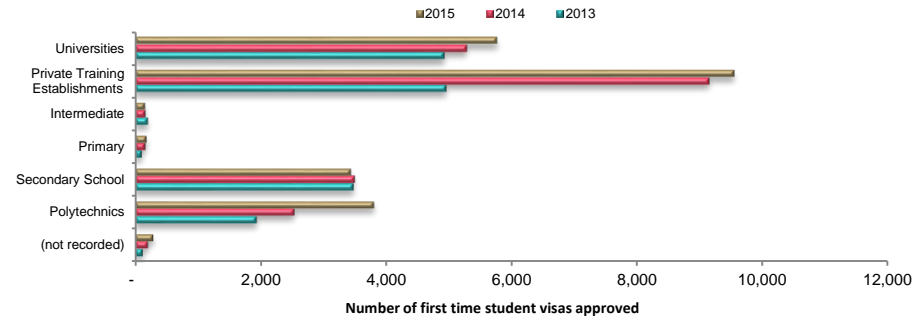
June RSV		June FSV		June TSV	
↑	533	22%	↑	516	11%
↑	1,049	15%			

YTD RSV		YTD FSV		YTD TSV	
↑	1,895	7%	↑	2,195	10%
↑	4,090	10%			

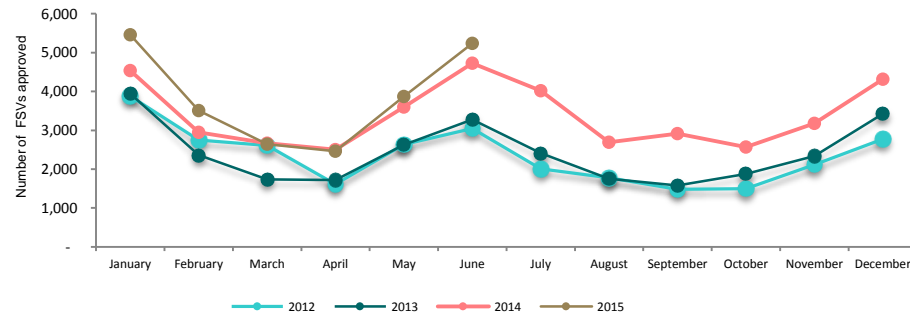
Overall: Total student visas (TSV) 2012 - 2015



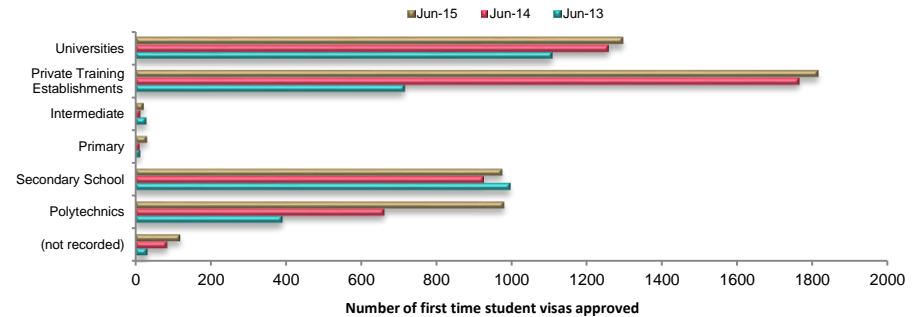
Overall: First time student visas issued by sector, YTD



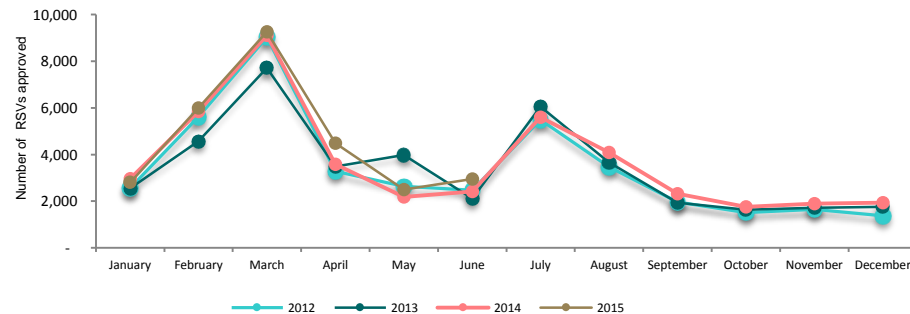
Overall: First time student visas (FSV) 2012 - 2015



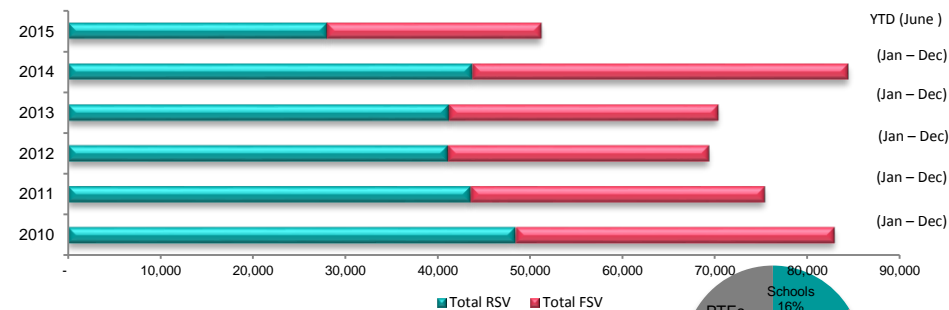
Overall: First time student visas issued by sector, June



Overall: Renewed student visas (RSV) 2012 - 2015



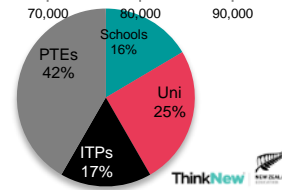
Overall: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- TSVs and FSVs have experienced a strong start for the 2015 academic year up 10% (4,090).
- YTD there has been strong growth in the universities and ITPs up 9%, and 50%.

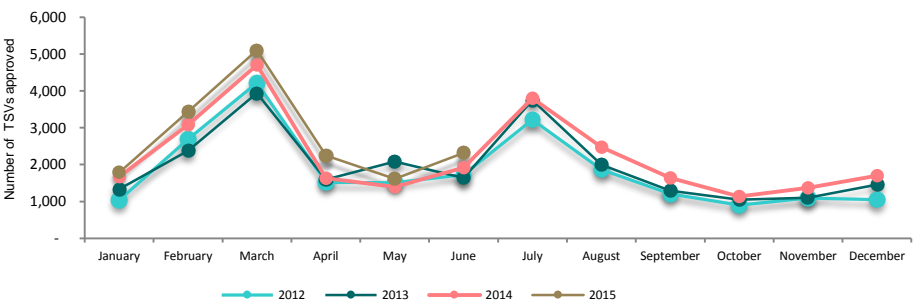
YTD 2015 sector breakdown of FSVs



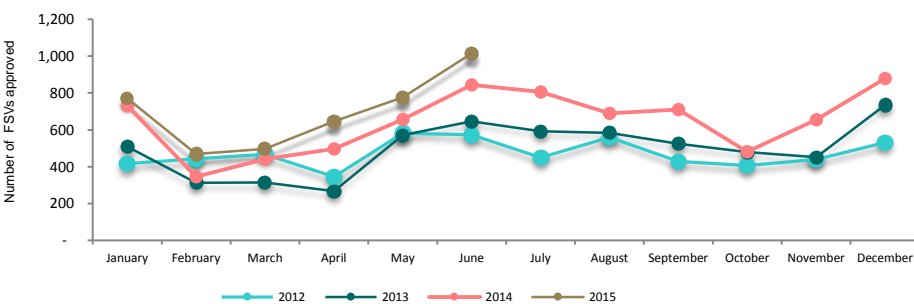
China:

June RSV			June FSV		June TSV			
↑	232	22%	↑	171	20%	↑	403	21%

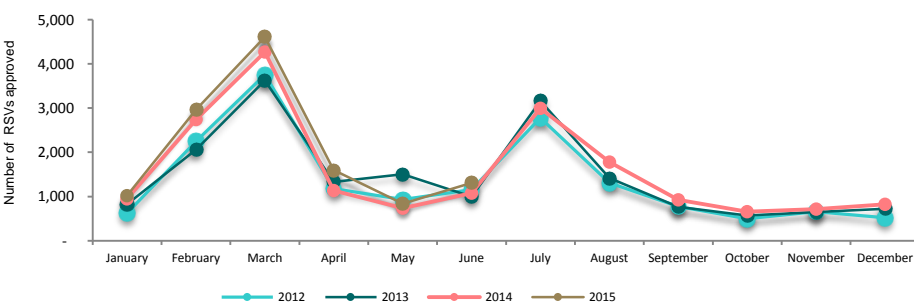
China: Total student visas (TSV) 2012 - 2015



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



China: Renewed student visas (RSV) 2012 - 2015

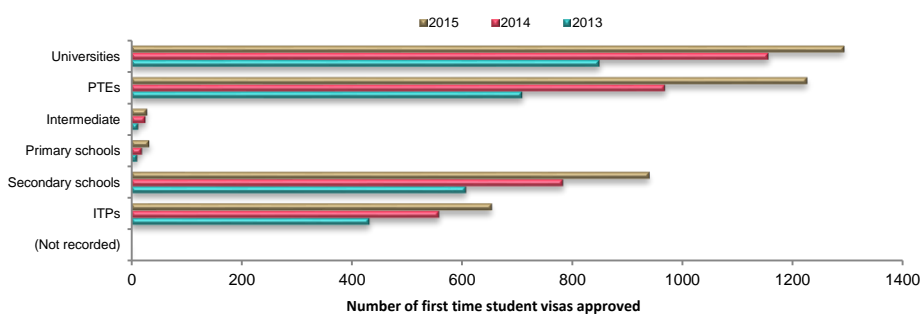


- Takeaways:
- China experienced a strong start to 2015 up 17% (2,094) YTD in TSVs.
 - All sectors have experienced growth YTD.

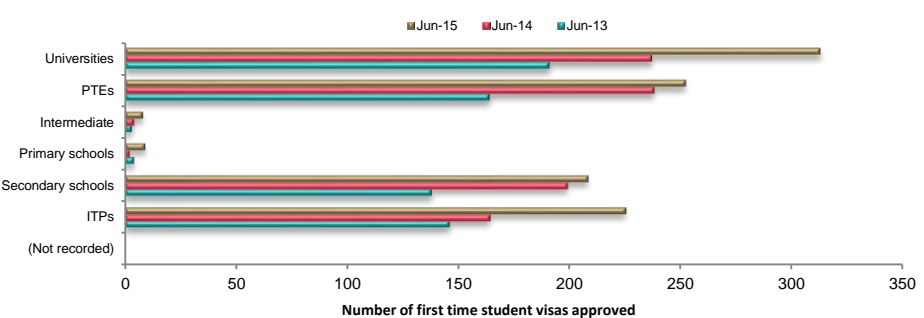
YTD (January to June)

YTD RSV		YTD FSV		YTD TSV	
↑ 1,435	13%	↑ 659	19%	↑ 2,094	17%

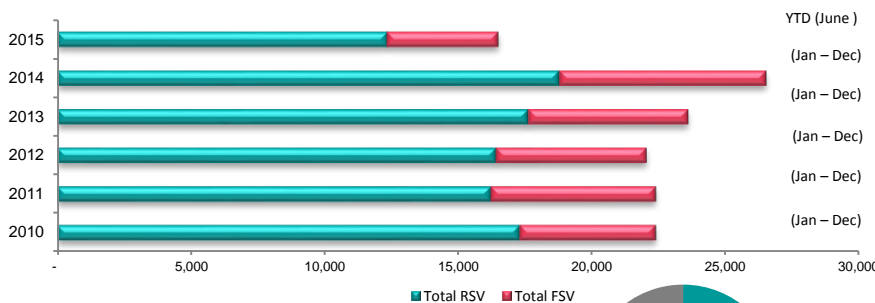
China: First time student visas issued by sector, YTD



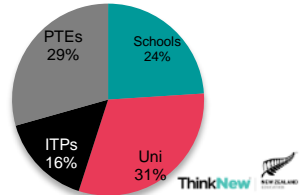
China: First time student visas issued by sector, June



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






YTD 2015 sector breakdown of FSVs

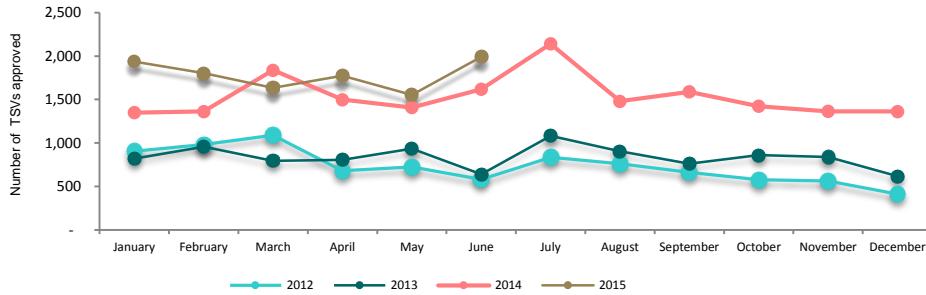


India:

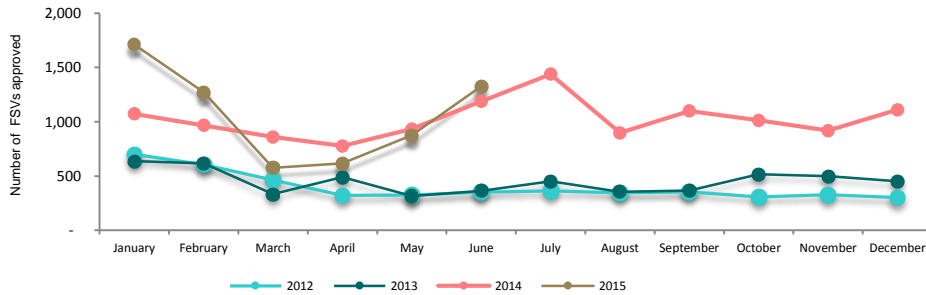
YTD (January to June)

June RSV		June FSV		June TSV	
	234	54%		141	12%
	375	23%			

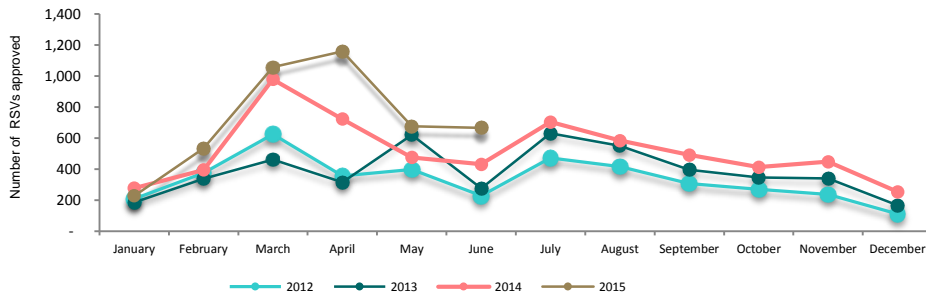
India: Total student visas (TSV) 2012 - 2015



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






India: Renewed student visas (RSV) 2012 - 2015

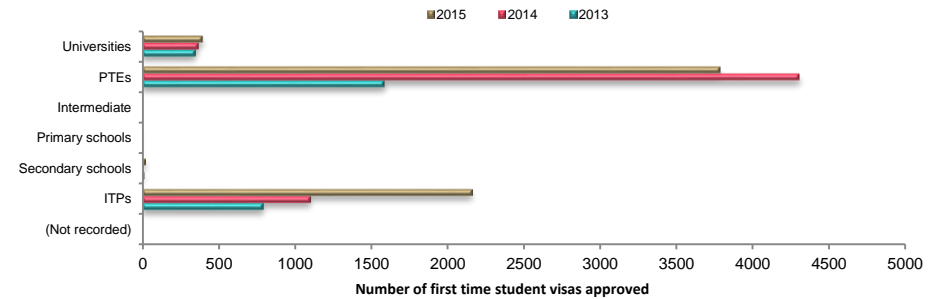


Takeaways:

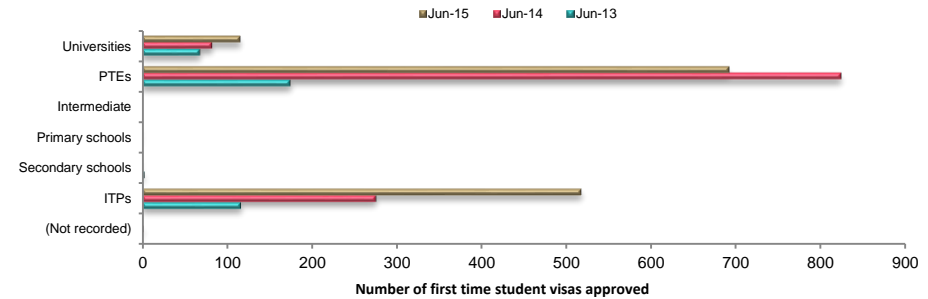
- Indian TSVs are tracking positively, up 22% (1,620) YTD.
- ITP FSVs continue to see strong growth up 96% (1,059) YTD.

YTD RSV		YTD FSV		YTD TSV	
	1,037	32%		583	10%
	1,620	22%			

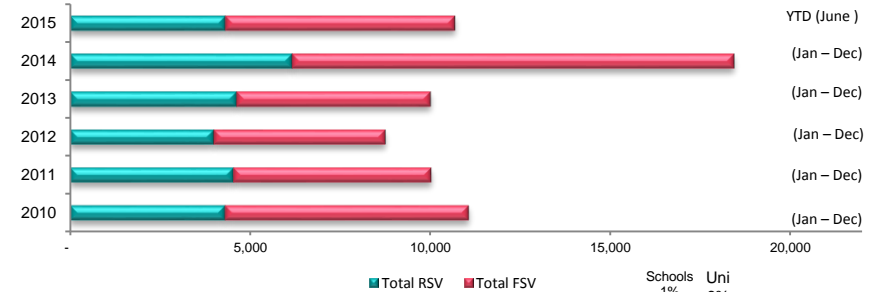
India: First time student visas issued by sector, YTD



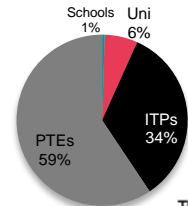
India: First time student visas issued by sector, June



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



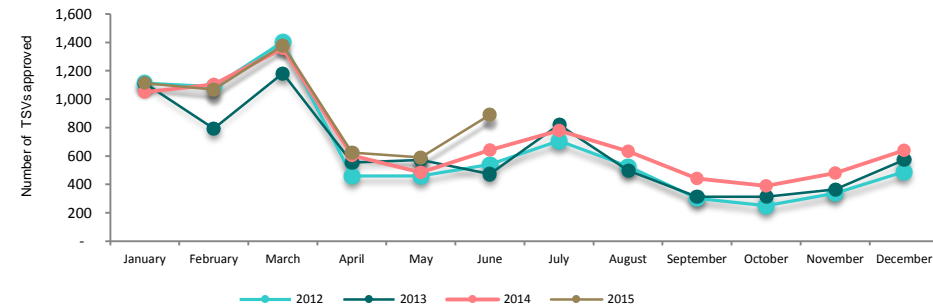
YTD 2015 sector
breakdown of FSVs



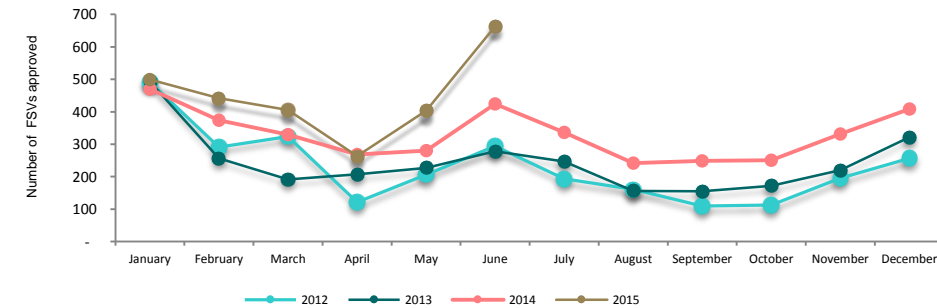
June RSV			June FSV		June TSV			
↑	7	3%	↑	239	56%	↑	246	38%

YTD RSV		YTD FSV		YTD TSV	
 -107	-3%	 529	25%	 422	9%

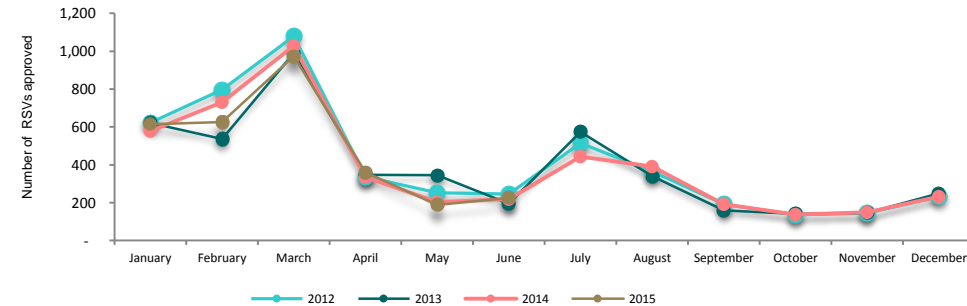
ASEAN: Total student visas (TSV) 2012 - 2015



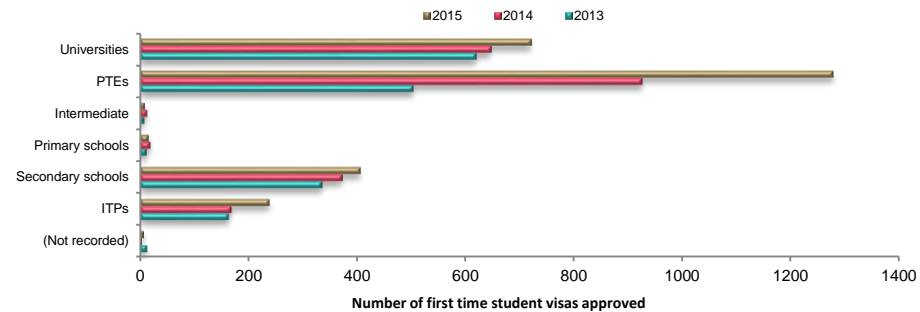
ASEAN: First time student visas (FSV) 2012 - 2015



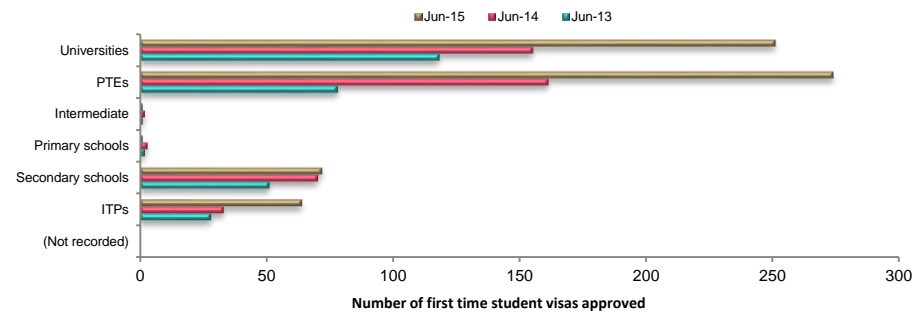
ASEAN: Renewed student visas (RSV) 2012 - 2015



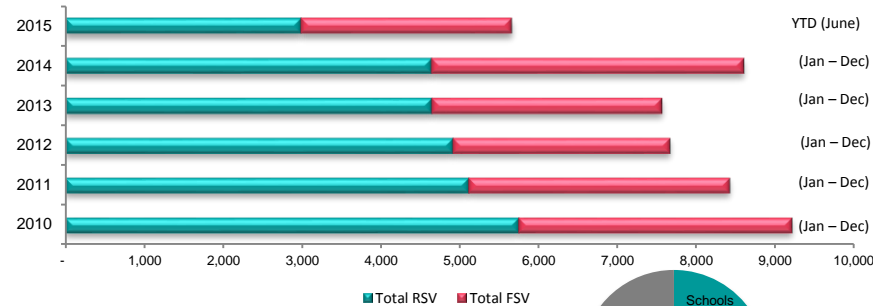
ASEAN: First time student visas issued by sector, YTD



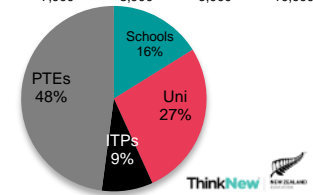
ASEAN: First time student visas issued by sector, June



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



YTD 2015 sector breakdown of FSVs



Takeaways:

- The ASEAN market experienced steady growth in 2015, however a decline in RSVs have slowed the YTD TSV position.
- FSVs have seen strong growth YTD up 25% (529) and 38% (246) in June. This growth is primarily driven by growth in Filipino PTE students.

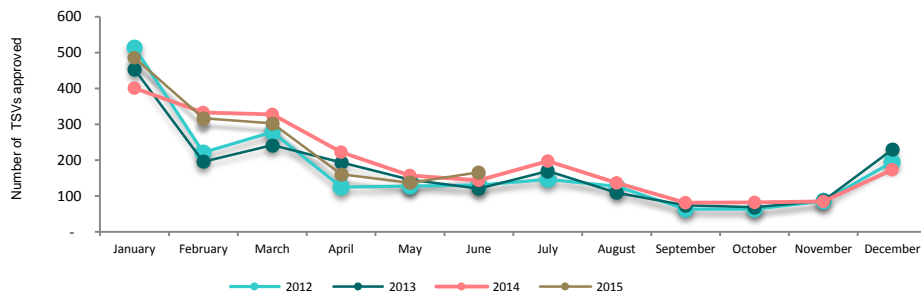
Thailand:

June RSV			June FSV		June TSV			
↑	10	20%	↑	13	14%	↑	23	16%

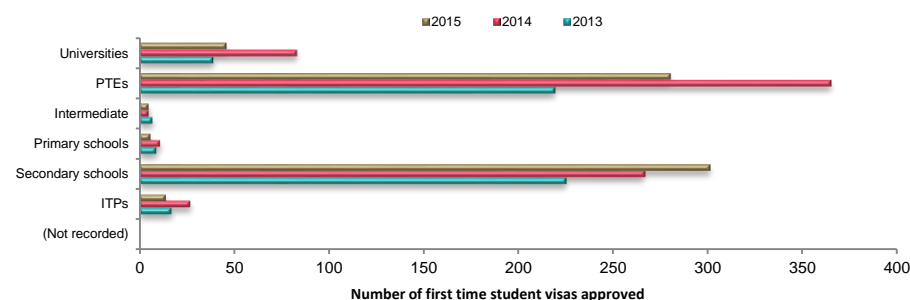
YTD (January to June)						
YTD RSV			YTD FSV		YTD TSV	
↑	88	11%	↓	-105	-14%	↓ -17 -1%

YTD (January to June)

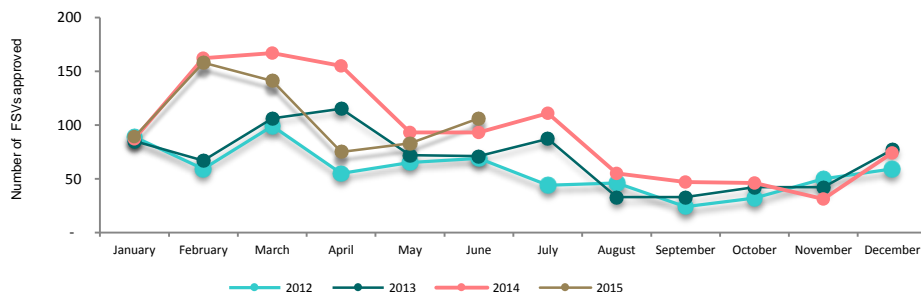
Thailand: Total student visas (TSV) 2012 - 2015



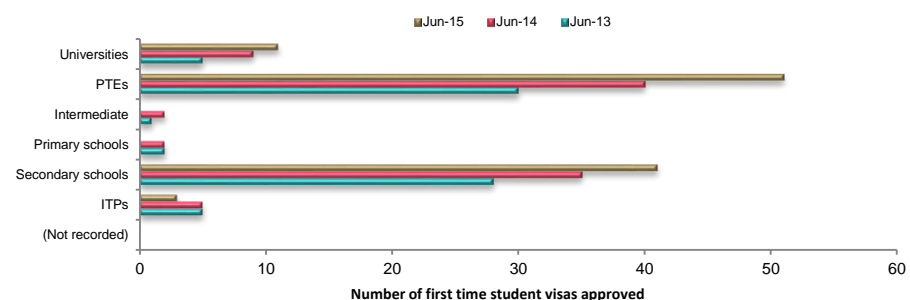
Thailand: First time student visas issued by sector, YTD



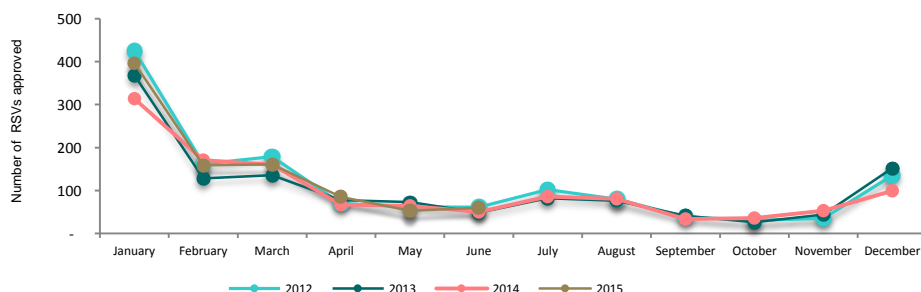
Thailand: First time student visas (FSV) 2012 - 2015



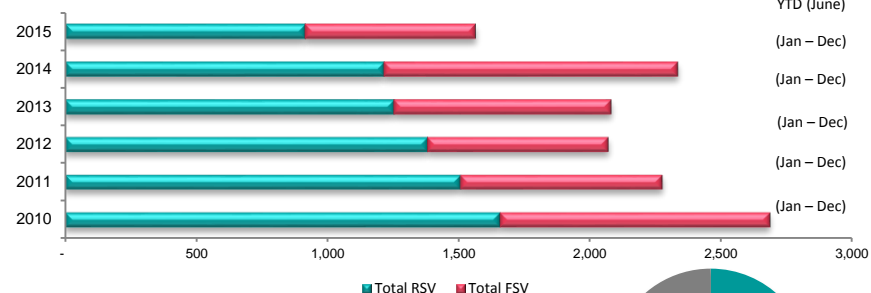
Thailand: First time student visas issued by sector, June



Thailand: Renewed student visas (RSV) 2012 - 2015



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



YTD (June)

(Jan - Dec)

(Jan - Dec)

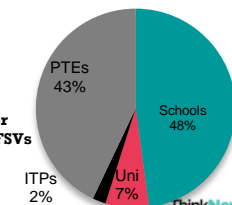
(Jan - Dec)

(Jan - Dec)

(Jan - Dec)




Total RSV Total FSV

YTD 2015 sector
breakdown of FSVs

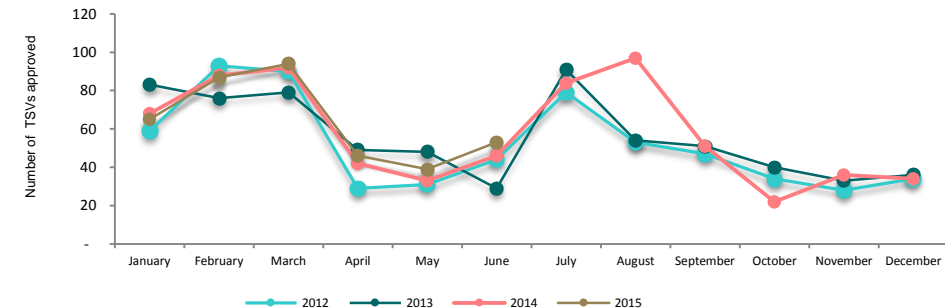


Takeaways:

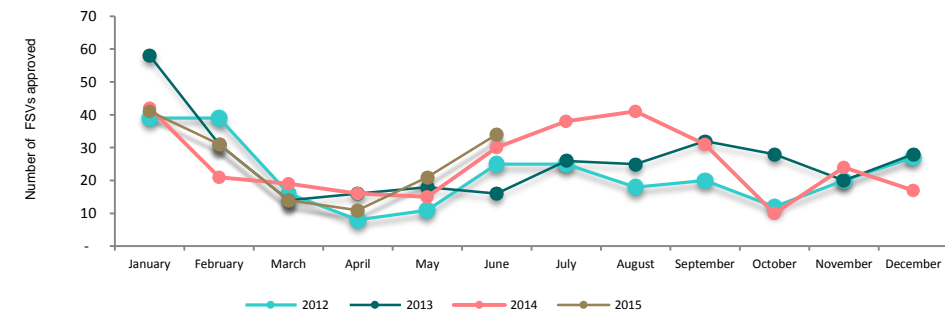
- This market is tracking flat on 2014 down 1% (-17) in TSVs.
- Secondary school sector has experienced strong growth up 13% (35) YTD.

June RSV		June FSV		June TSV	
	3	19%		4	13%
	7	15%			

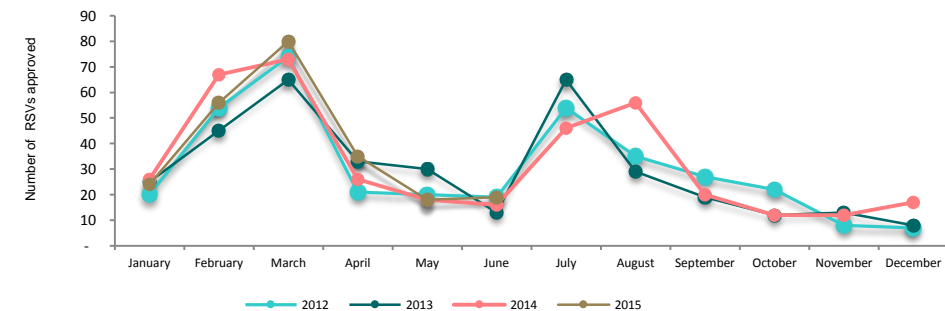
Indonesia: Total student visas (TSV) 2012 - 2015



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






Indonesia: Renewed student visas (RSV) 2012 - 2015

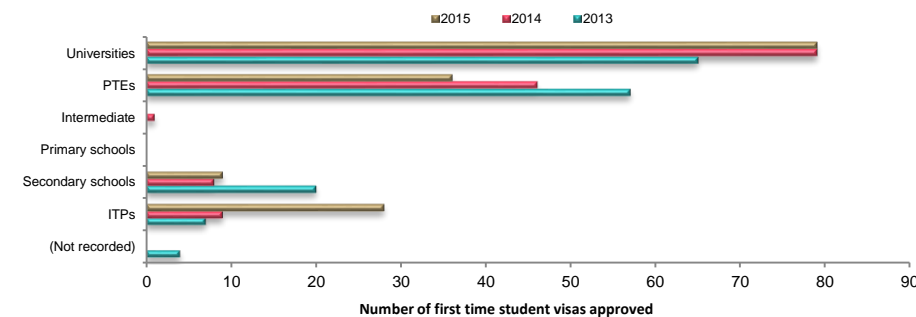


Takeaways:

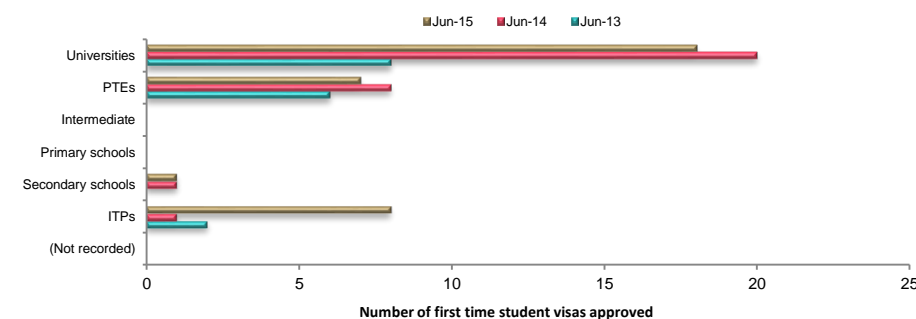
- Overall this market has shown growth up 5% (15) in TSVs YTD.
- This growth is primarily driven by the ITP sector up 211% (19).

YTD RSV		YTD FSV		YTD TSV	
	6	3%		9	6%
	15	5%			

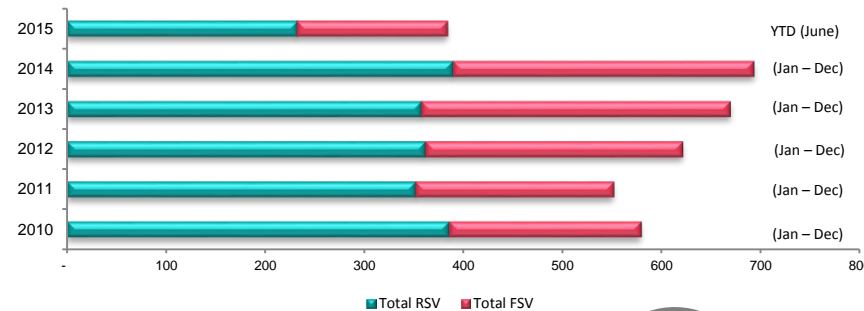
Indonesia: First time student visas issued by sector, YTD



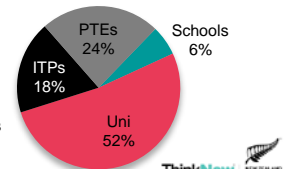
Indonesia: First time student visas issued by sector, June



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



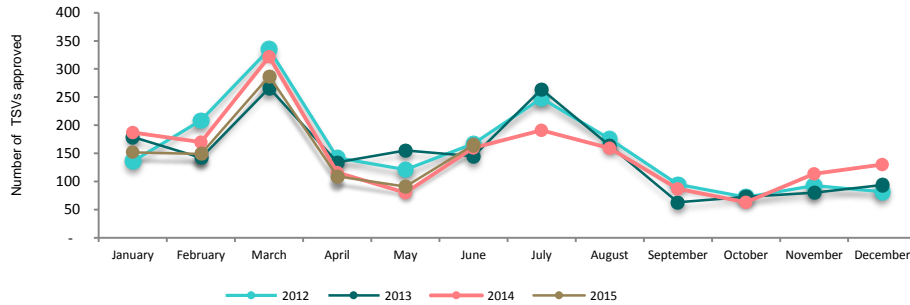
YTD 2015 sector breakdown of FSVs



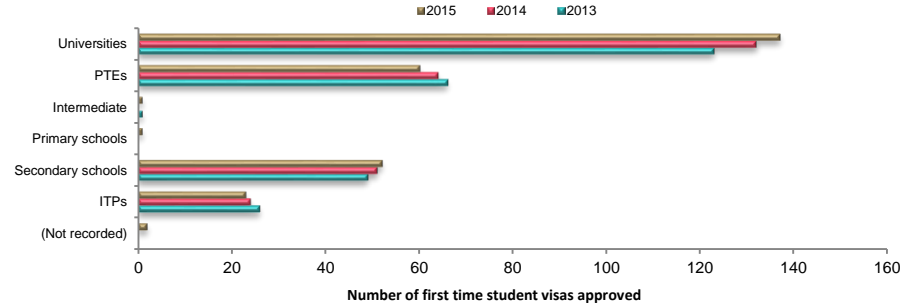
June RSV		June FSV		June TSV	
↑	3	4%	↑	2	2%
↑	5	3%			

YTD RSV		YTD FSV		YTD TSV	
↓	-87	-11%	↑	5	2%
↓	-82	-9%			

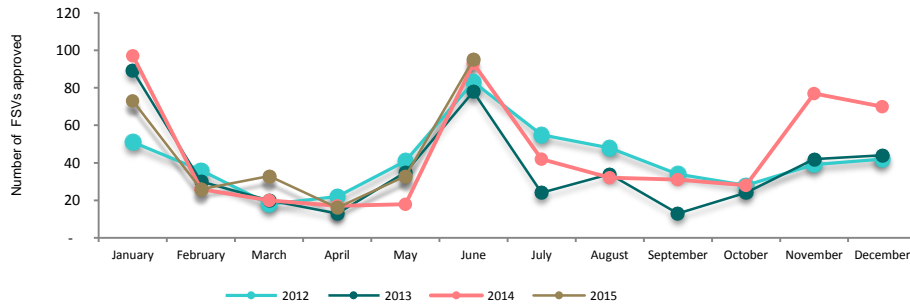
Viet Nam: Total student visas (TSV) 2012 - 2015



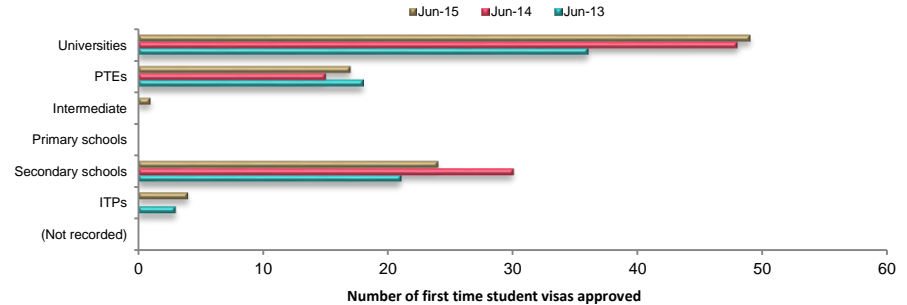
Viet Nam: First time student visas issued by sector, YTD



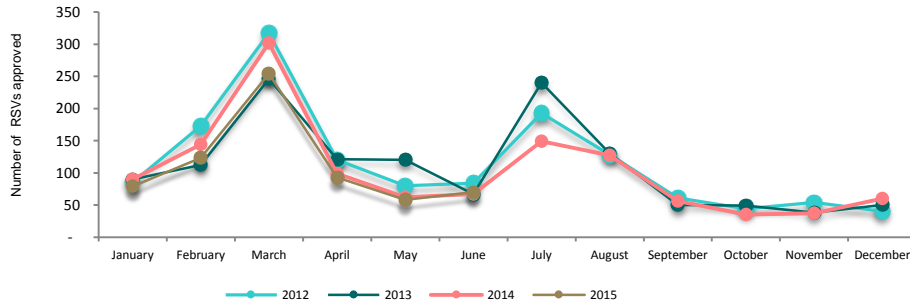
Viet Nam: First time student visas (FSV) 2012 - 2015



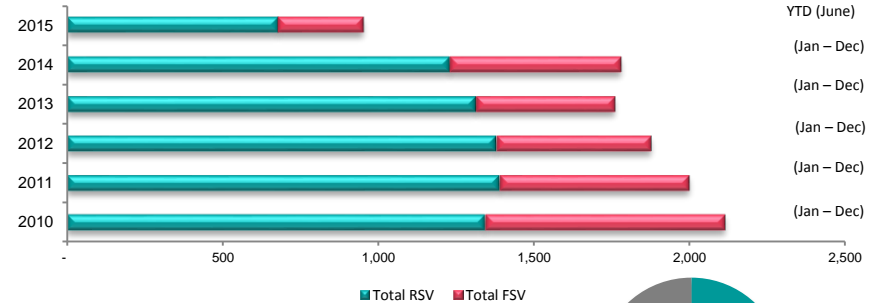
Viet Nam: First time student visas issued by sector, June



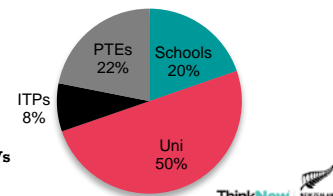
Viet Nam: Renewed student visas (RSV) 2012 - 2015



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



YTD 2015 sector breakdown of FSVs

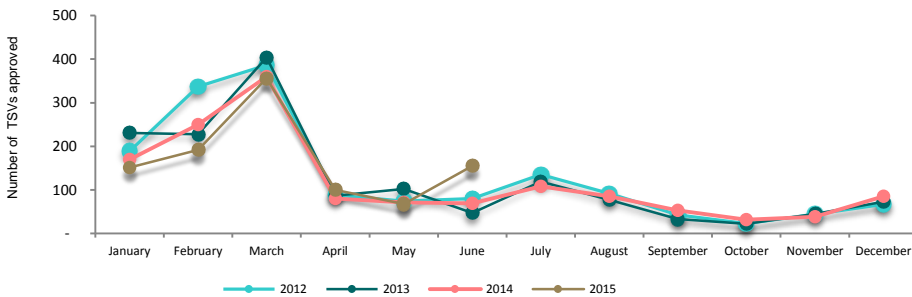


Takeaways:

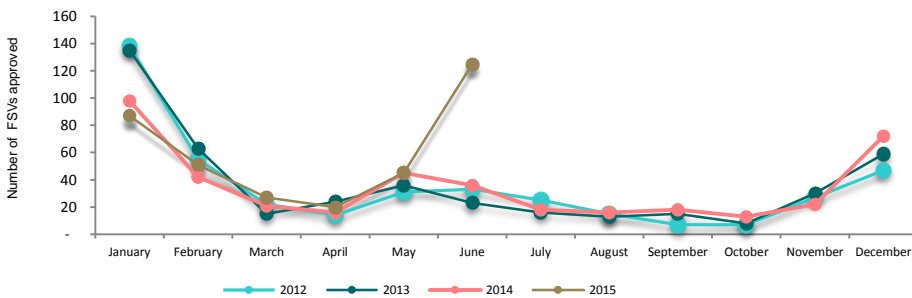
- Despite a positive May, YTD this market has experienced a 9% decline in TSVs.
- The university sector has seen growth up 4%.
- Reports from the market indicate that there has been a steady increase in students that have a higher risk profile for Immigration NZ. This is leading to higher declines and lower student numbers approved. ENZ is working with INZ to better understand this issue.

June RSV		June FSV		June TSV	
↓ -3	-9%	↑ 89	247%	↑ 86	125%

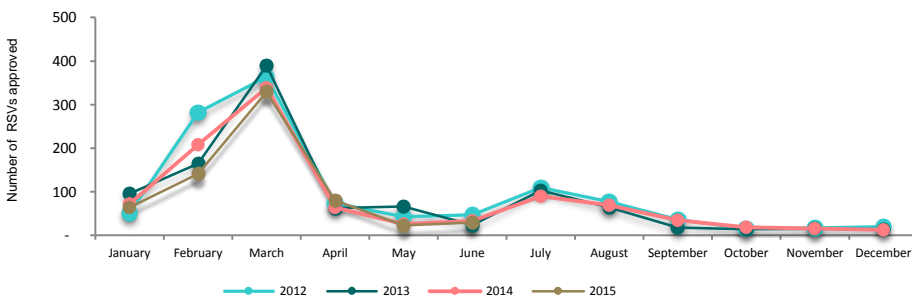
Malaysia: Total student visas (TSV) 2012 - 2015



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



Malaysia: Renewed student visas (RSV) 2012 - 2015



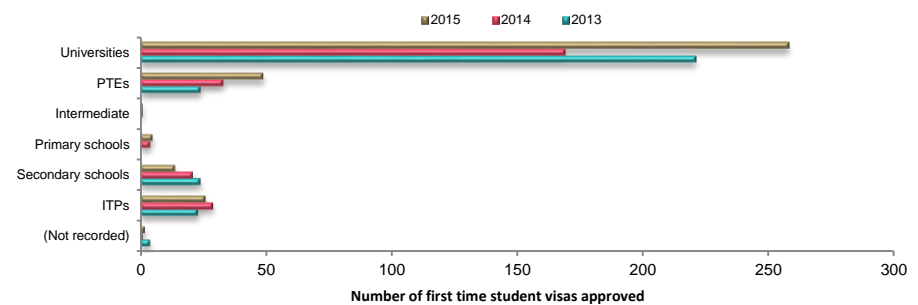
Takeaways:

- This market has tracked flat throughout 2014 and 2015, however a strong June has slowed the YTD decline and is tracking flat at 2%.
- The growth in June was driven by a cohort of Malaysian Government university scholarship students.

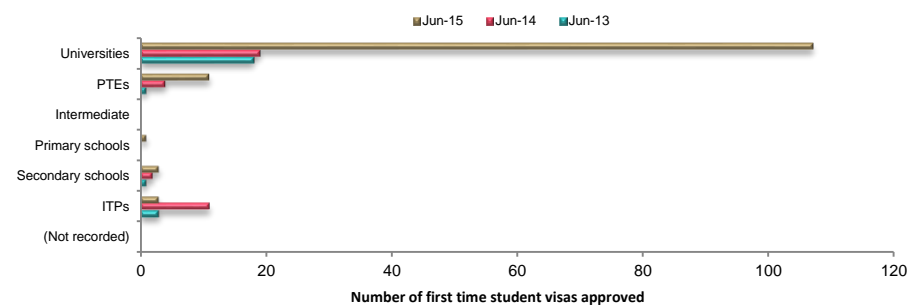
YTD (January to June)

YTD RSV		YTD FSV		YTD TSV	
↓ -75	-10%	↑ 97	38%	↑ 22	2%

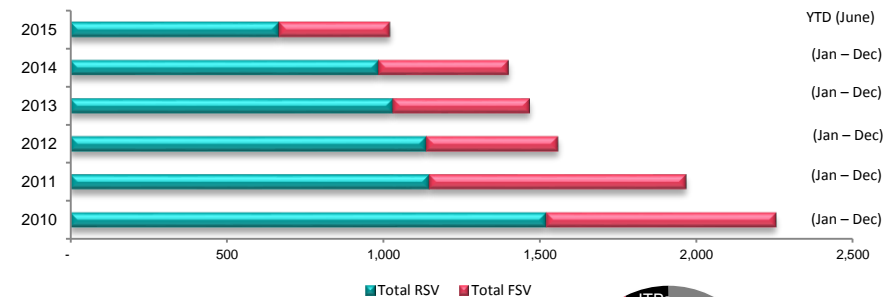
Malaysia: First time student visas issued by sector, YTD



Malaysia: First time student visas issued by sector, June

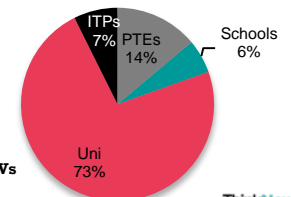


Malaysia: Cumulative total for RSV vs. FSV 2010 - 2015



YTD (June)

YTD 2015 sector breakdown of FSVs



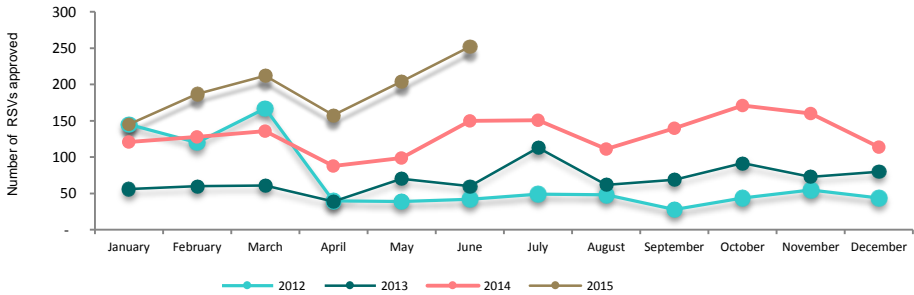
Philippines

YTD (January to June)

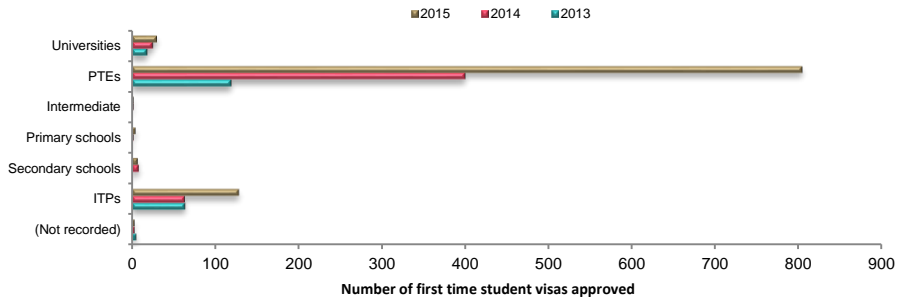
June RSV		June FSV		June TSV	
↓	-20	↑	122	↑	102
	-50%		111%		68%

YTD RSV		YTD FSV		YTD TSV	
↓	-40	↑	476	↑	436
	-18%		95%		76%

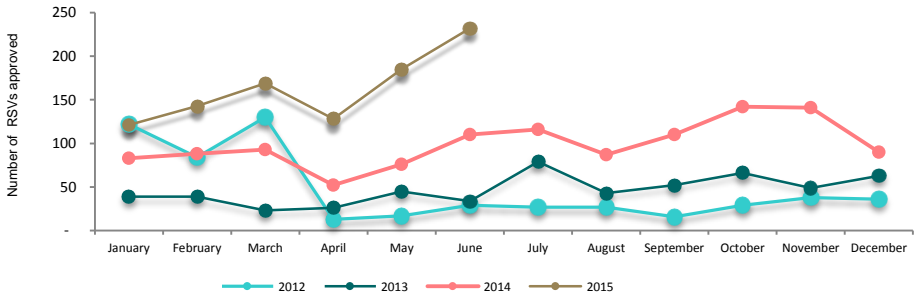
Philippines: Total student visas (TSV) 2012 - 2015



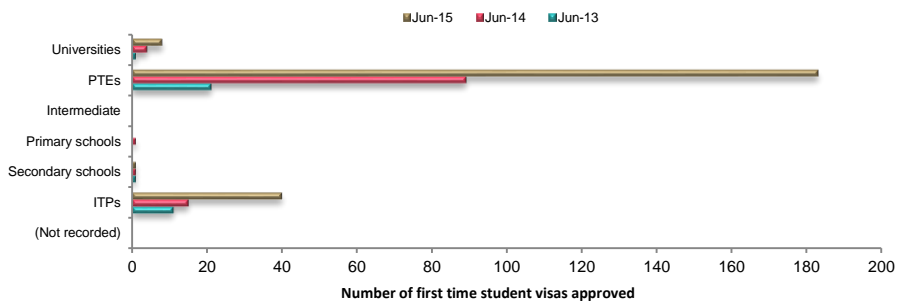
Philippines: First time student visas issued by sector, YTD



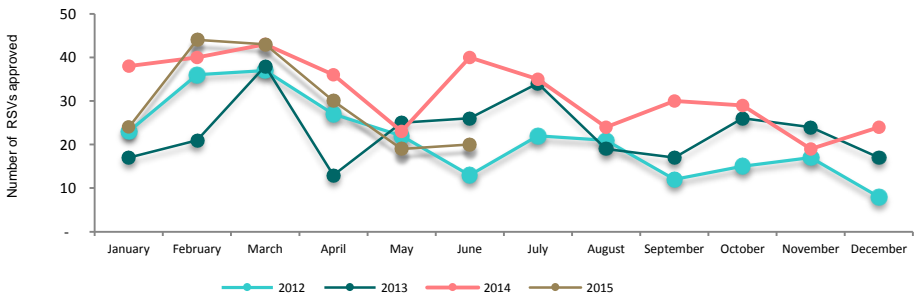
Philippines: First time student visas (FSV) 2012 - 2015



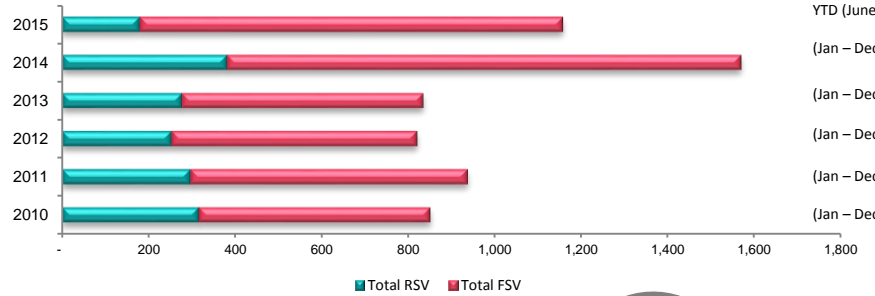
Philippines: First time student visas issued by sector, June



Philippines: Renewed student visas (RSV) 2012 - 2015

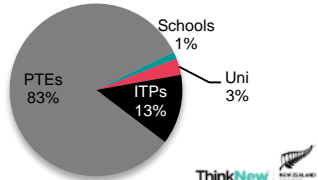


Philippines: Cumulative total for RSV vs. FSV 2010 - 2015



- 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 101% and 85%.

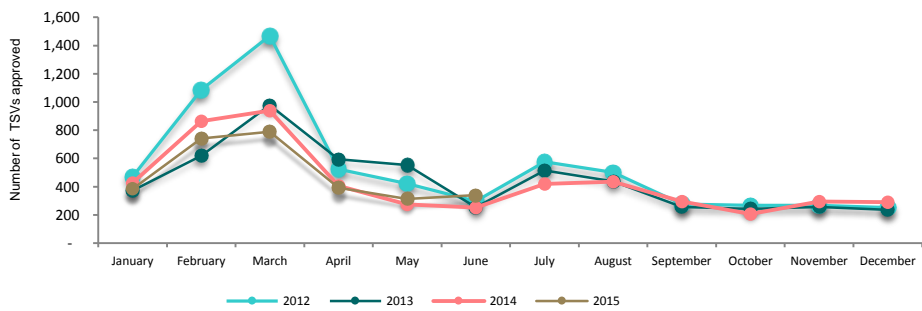
YTD 2015 sector breakdown of FSVs



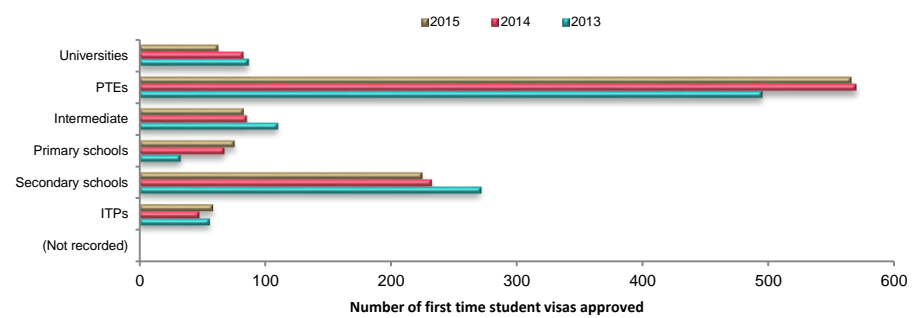
June RSV			June FSV			June TSV		
↑	25	21%	↑	63	48%	↑	88	35%

YTD RSV			YTD FSV			YTD TSV		
↓	-187	-9%	↓	-16	-1%	↓	-203	-7%

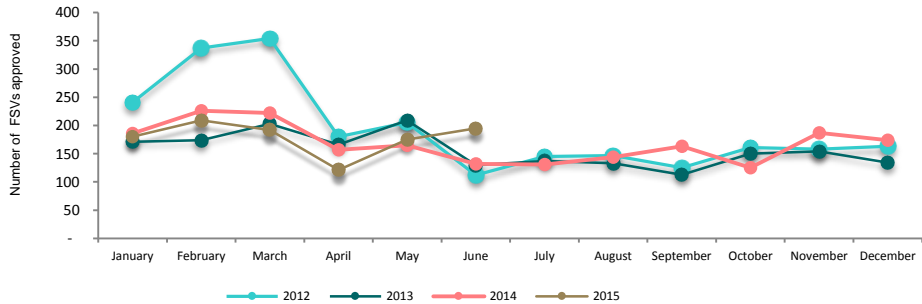
Korea: Total student visas (TSV) 2012 - 2015



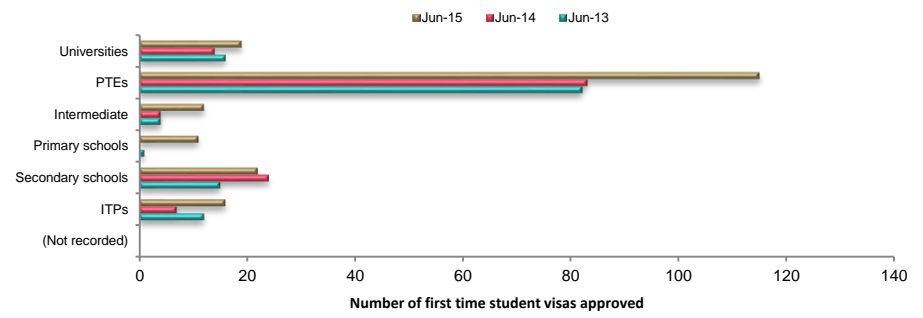
Korea: First time student visas issued by sector, YTD



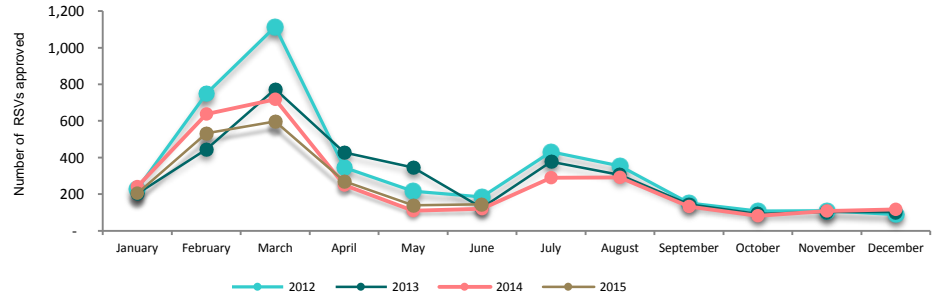
Korea: First time student visas (FSV) 2012 - 2015



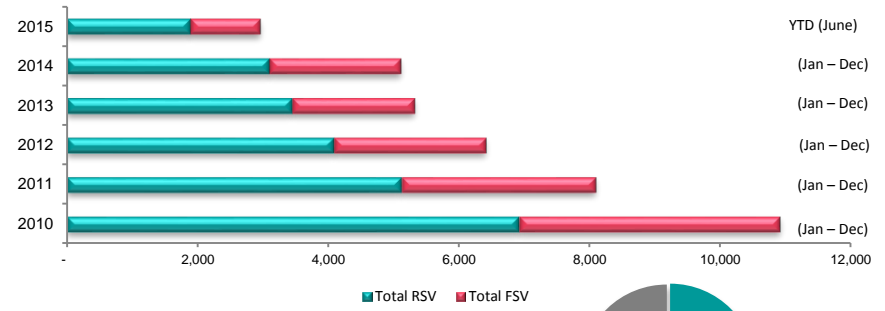
Korea: First time student visas issued by sector, June



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



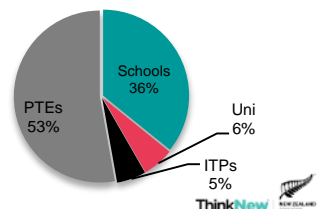
Korea: Cumulative total for RSV vs. FSV 2010 - 2015









Takeaways:

- This market continues to see declines, down 7% (203 TSVs) YTD.
- A strong May and June has seen the long-term decline slow.

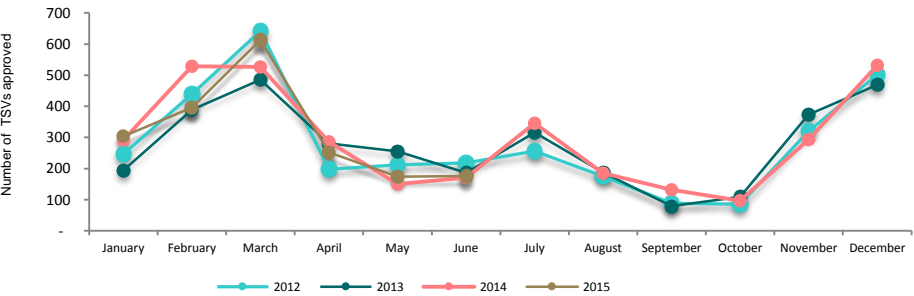
YTD 2015 sector breakdown of FSVs



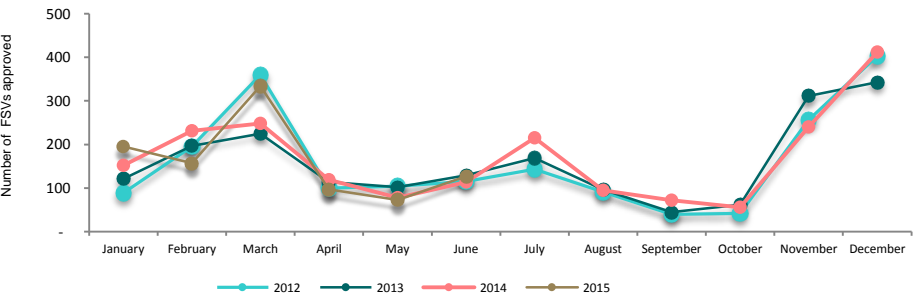
June RSV		June FSV		June TSV	
	-8		13		5
	-14%		11%		3%

YTD RSV		YTD FSV		YTD TSV	
	-81		41		-40
	-8%		4%		-2%

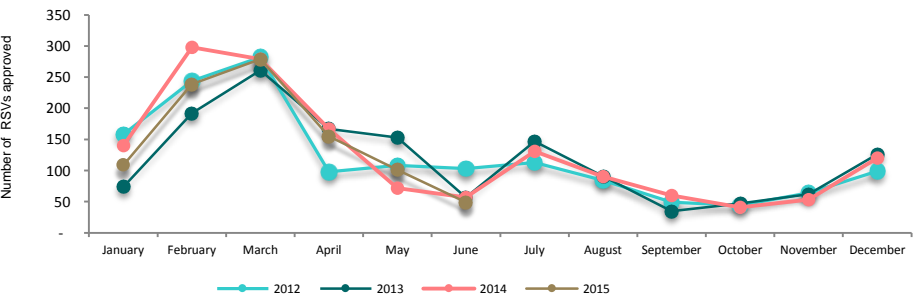
Japan: Total student visas (TSV) 2012 - 2015



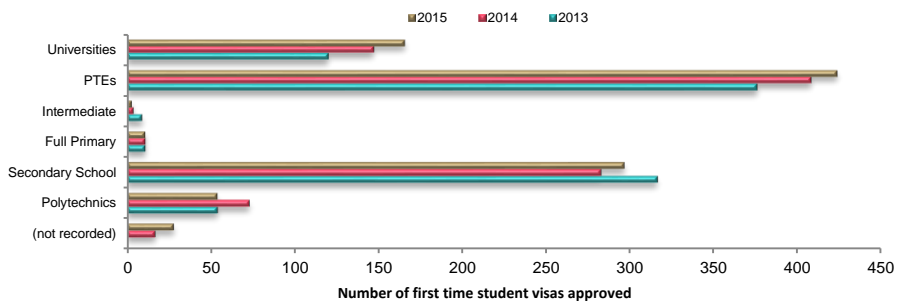
Japan: First time student visas (FSV) 2012 - 2015



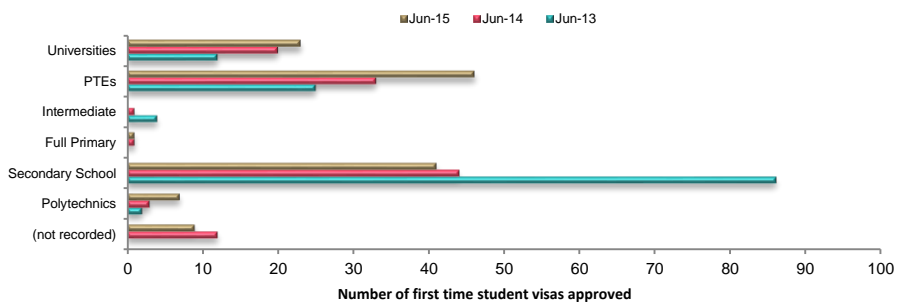
Japan: Renewed student visas (RSV) 2012 - 2015



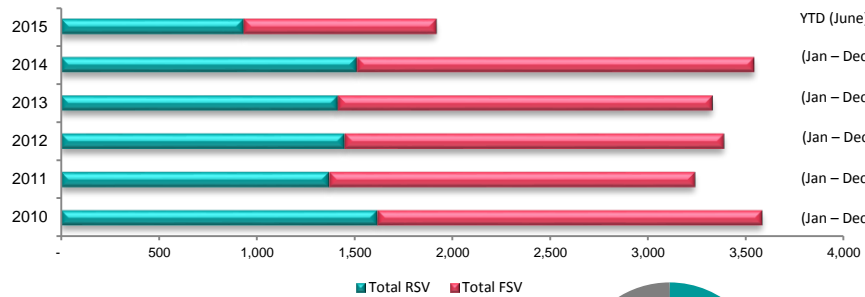
Japan: First time student visas issued by sector, YTD



Japan: First time student visas issued by sector, June



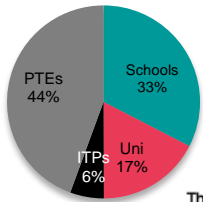
Japan: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- Japan has been tracking relatively flat YTD, down 2% (-40).

YTD 2015 sector breakdown of FSVs



United States of America:

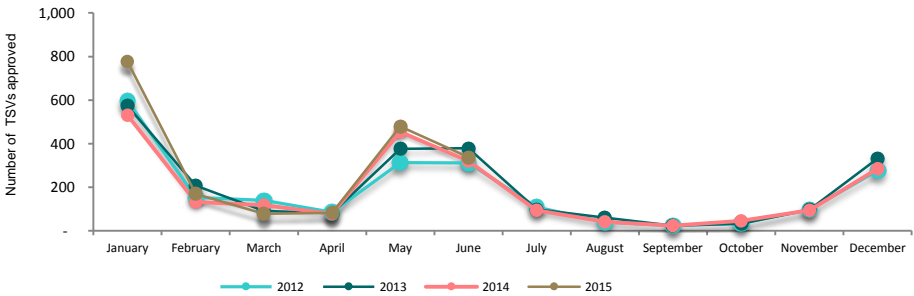


YTD (January to June)

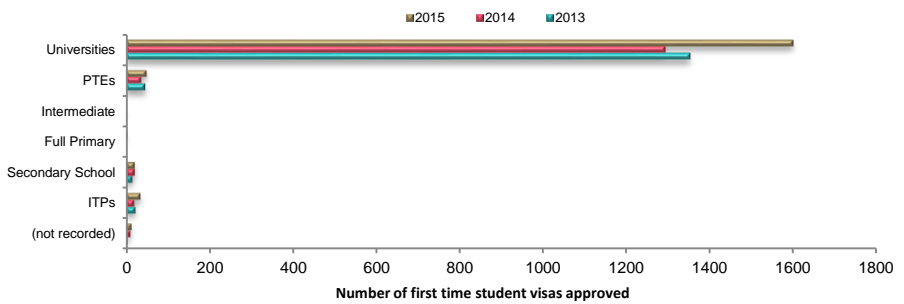
June RSV			June FSV		June TSV			
↑	13	93%	↑	6	2%	↑	19	6%

YTD RSV			YTD FSV		YTD TSV			
↓	-49	-19%	↑	340	25%	↑	291	22%

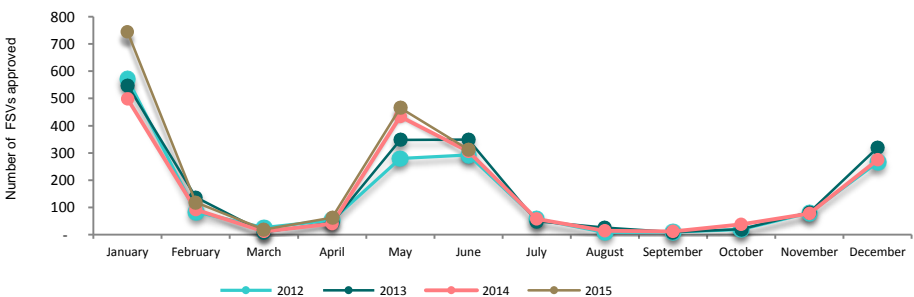
United States of America: Total student visas (TSV) 2012 - 2015



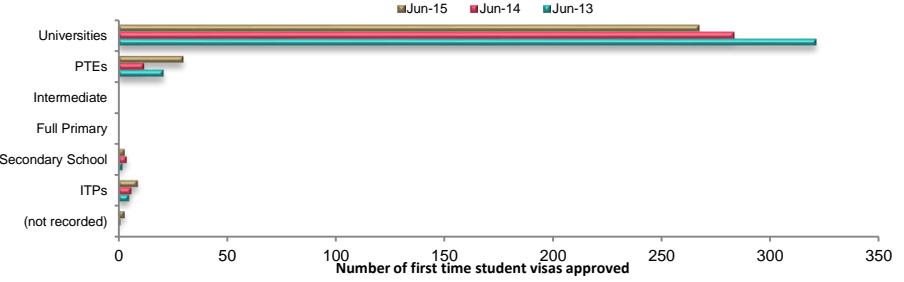
United States of America: First time student visas issued by sector, YTD



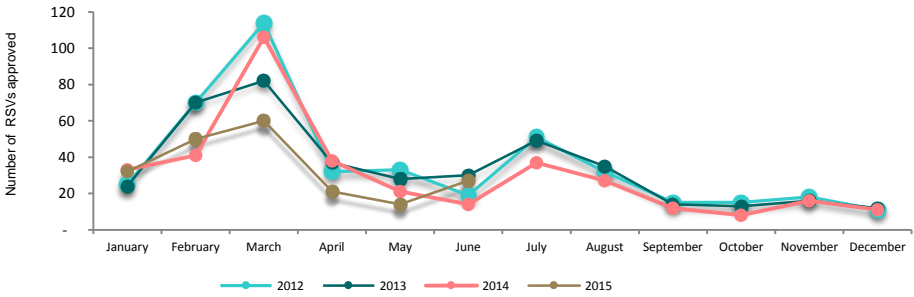
United States of America: First time student visas (FSV) 2012 - 2015



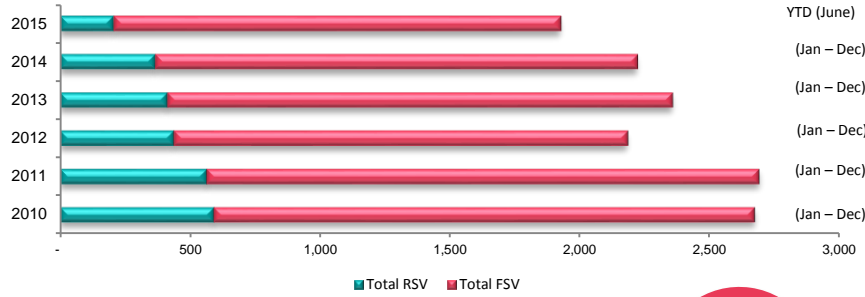
United States of America: First time student visas issued by sector, June



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

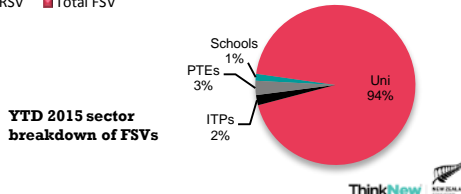


United States of America: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market has experienced a significant increase YTD up 22% (291).
- 94% of the approved FSVs for this market are university students.



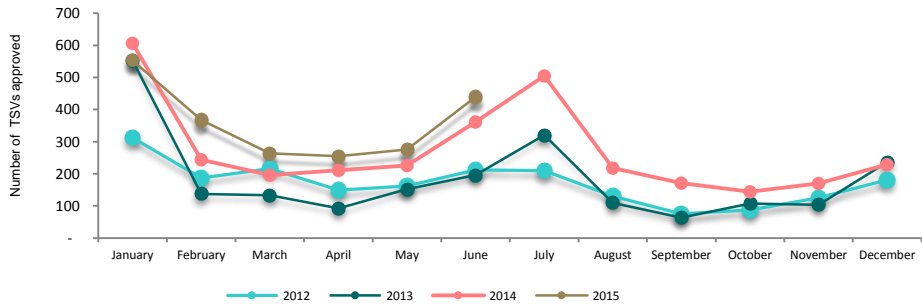
Latin America:

YTD (January to June)

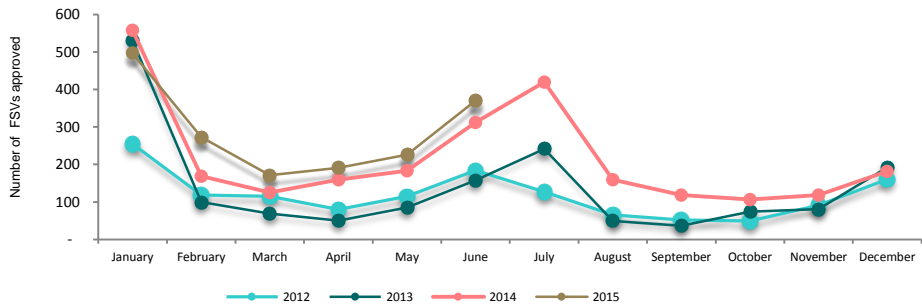
June RSV		June FSV		June TSV	
↑	19	38%	↑	58	19%
↑	77	21%			

YTD RSV		YTD FSV		YTD TSV	
↑	87	26%	↑	222	15%
↑	309	21%			

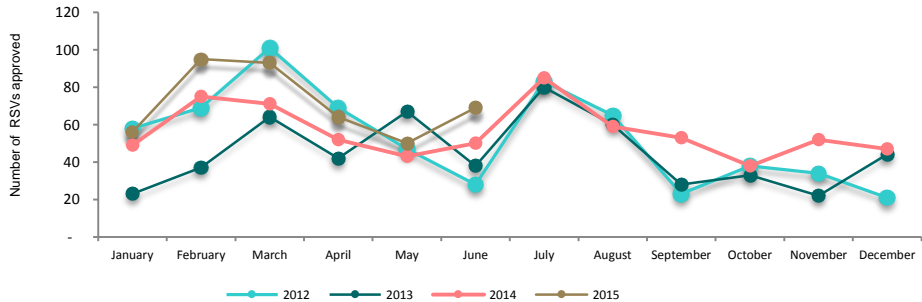
Latin America: Total student visas (TSV) 2012 - 2015



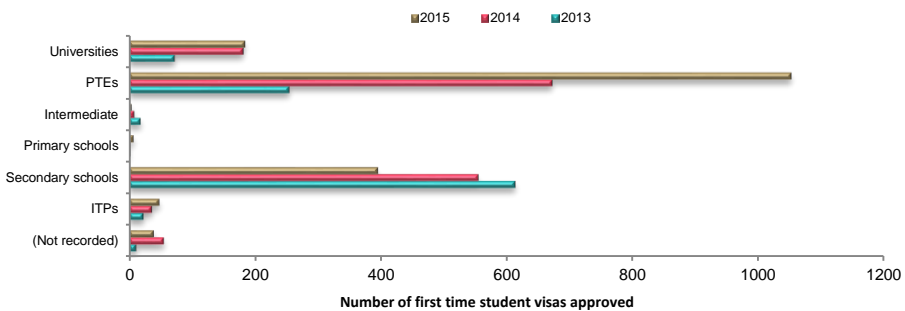
Latin America: First time student visas (FSV) 2012 - 2015



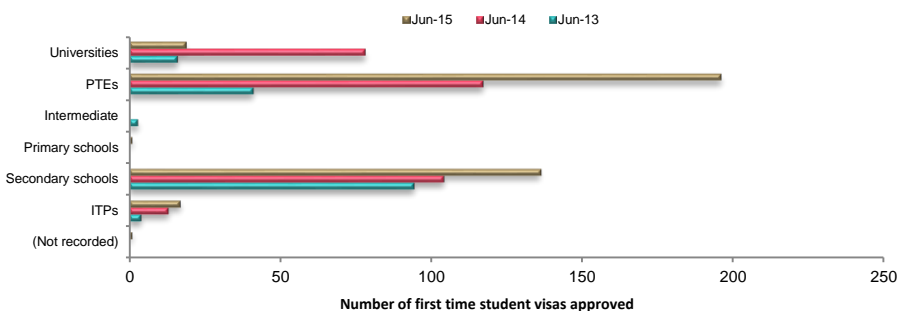
Latin America: Renewed student visas (RSV) 2012 - 2015



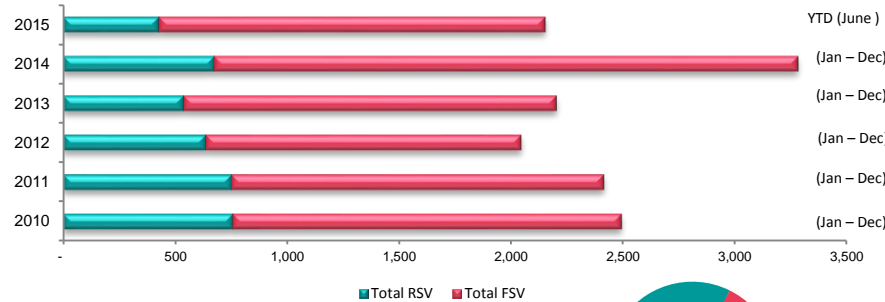
Latin America: First time student visas issued by sector, YTD



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



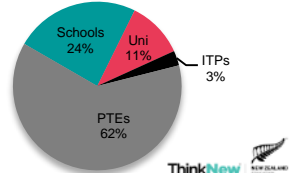
Latin America: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market has experienced significant growth in 2015, especially within the university and PTE sectors.

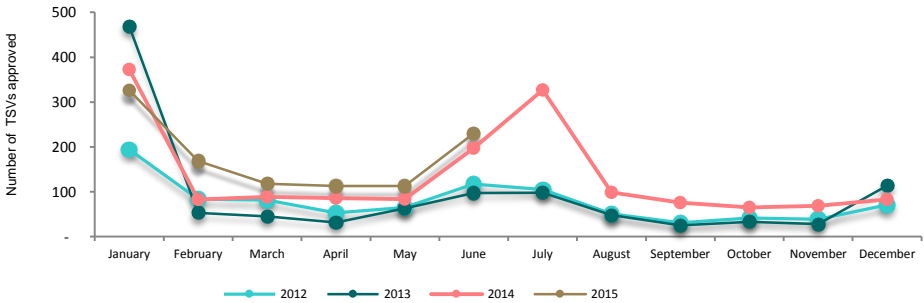
YTD 2015 sector
breakdown of FSVs



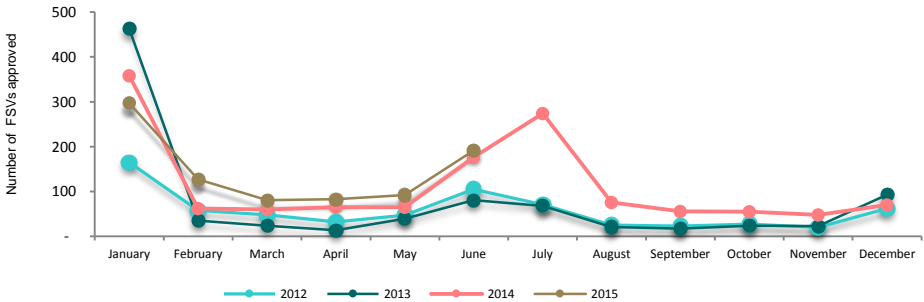
June RSV			June FSV		June TSV			
📈	18	86%	📈	15	9%	📈	33	17%

YTD RSV			YTD FSV		YTD TSV			
↑	72	57%	↑	85	11%	↑	157	22%

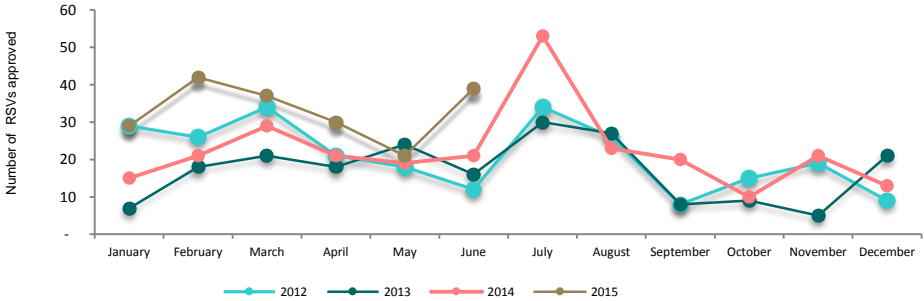
Brazil: Total student visas (TSV) 2012 - 2015



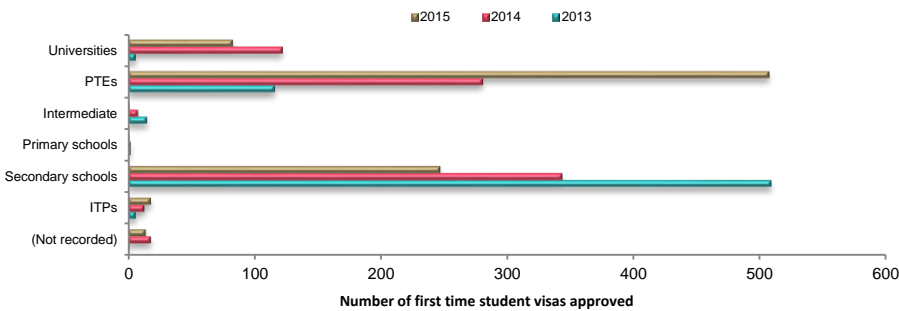
Brazil: First time student visas (FSV) 2012 - 2015



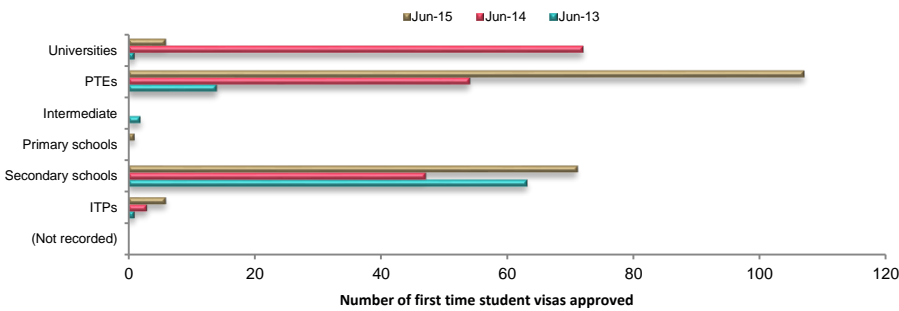
Brazil: Renewed student visas (RSV) 2012 - 2015



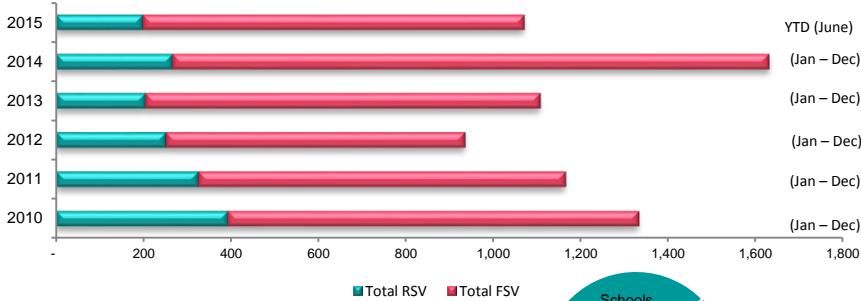
Brazil: First time student visas issued by sector, YTD



Brazil: First time student visas issued by sector, June



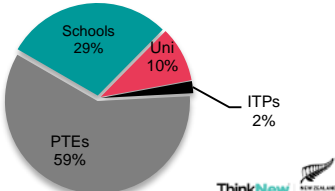
Brazil: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- Brazil has experienced strong YTD growth up 22% (157) in TSVs.
- The PTE sector has experienced strong growth up 81% YTD.

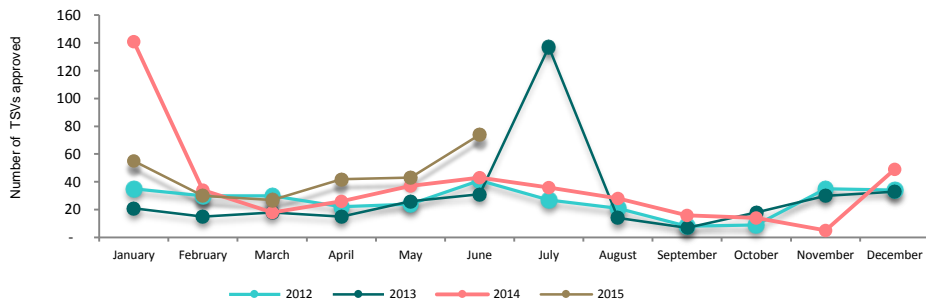
YTD 2015 sector breakdown of FSVs



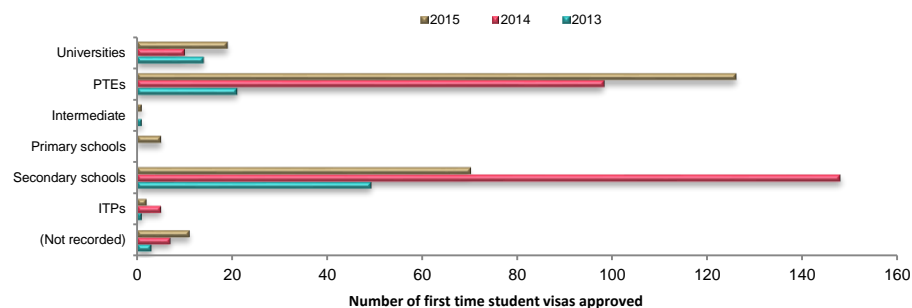
June RSV			June FSV			June TSV		
↑	1	20%	↑	30	79%	↑	31	72%

YTD RSV			YTD FSV			YTD TSV		
↑	6	19%	↓	-34	-13%	↓	-28	-11%

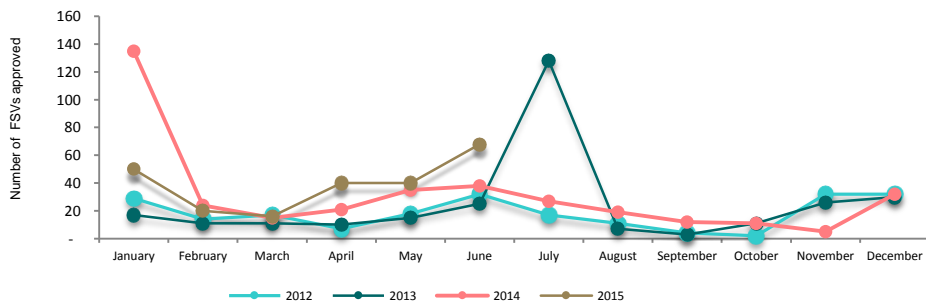
Chile: Total student visas (TSV) 2012 - 2015



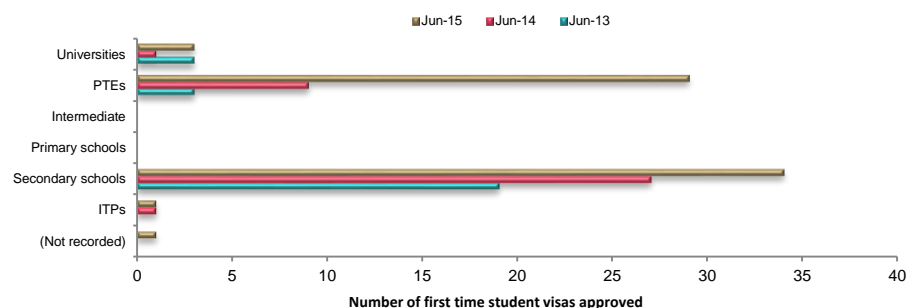
Chile: First time student visas issued by sector, YTD



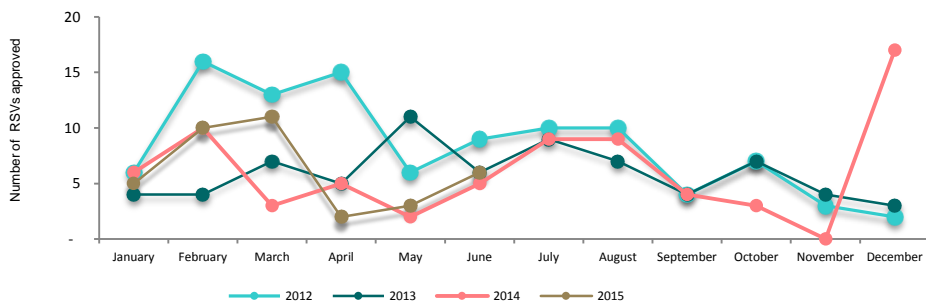
Chile: First time student visas (FSV) 2012 - 2015



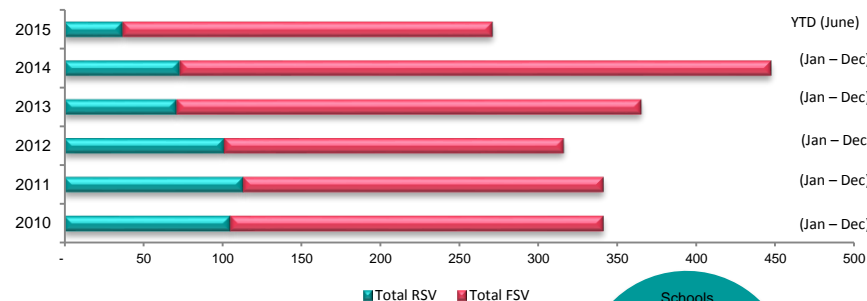
Chile: First time student visas issued by sector, June



Chile: Renewed student visas (RSV) 2012 - 2015



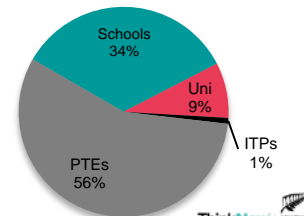
Chile: Cumulative total for RSV vs. FSV 2010 - 2015









Takeaways:

- This market has experienced a decline in visa approvals YTD.
- April, May and June proved to be a positive months, however this growth was not enough to offset YTD declines.
- A reduction in Chilean scholarship students has caused a significant decline in secondary school students.

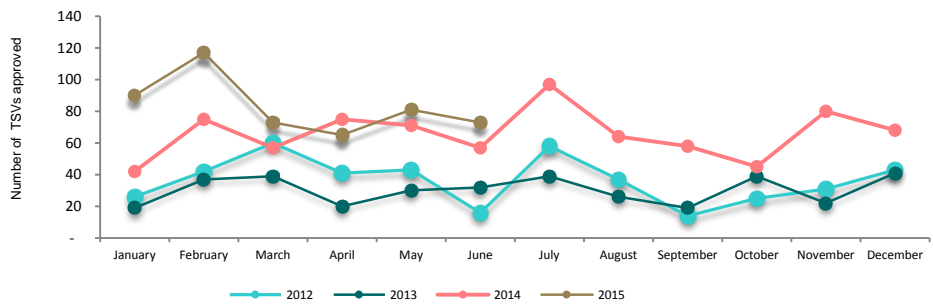
YTD 2015 sector breakdown of FSVs



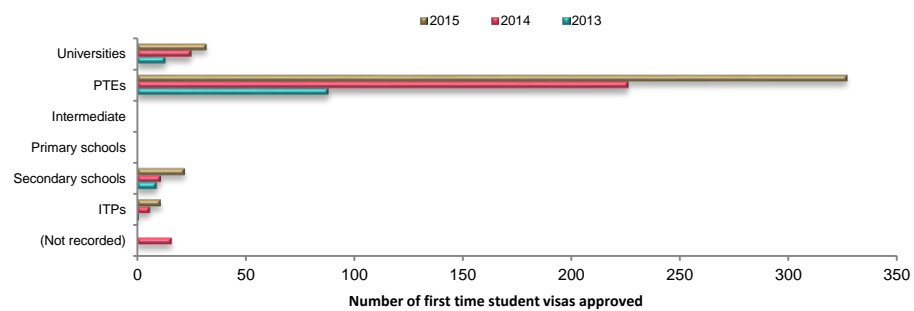
June RSV			June FSV			June TSV		
	5	42%		11	24%		16	28%

YTD RSV			YTD FSV			YTD TSV		
	14	15%		108	38%		122	38%

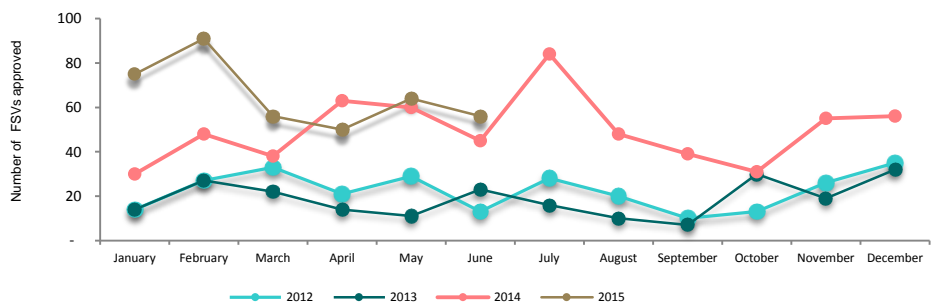
Colombia: Total student visas (TSV) 2012 - 2015



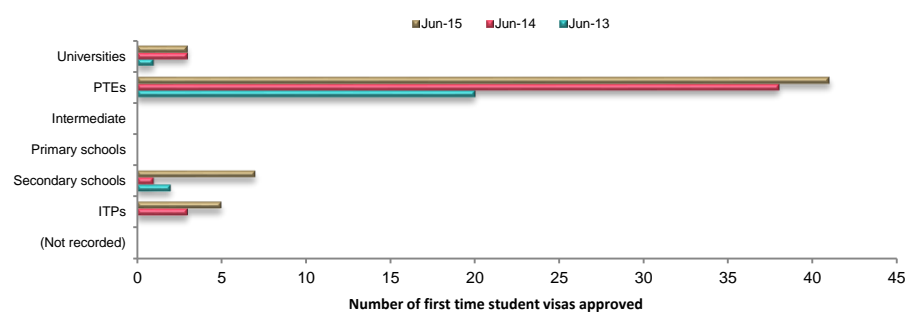
Colombia: First time student visas issued by sector, YTD



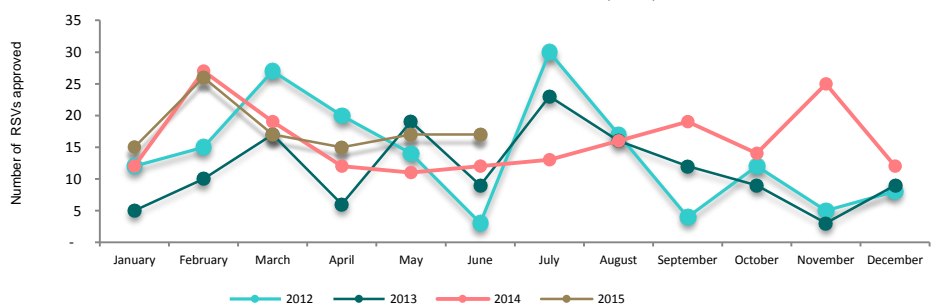
Colombia: First time student visas (FSV) 2012 - 2015



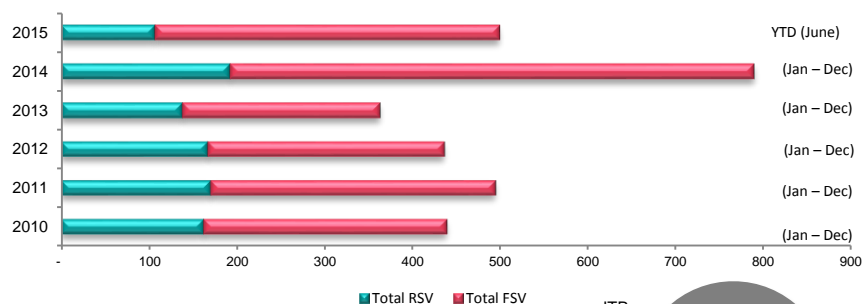
Colombia: First time student visas issued by sector, June



Colombia: Renewed student visas (RSV) 2012 - 2015



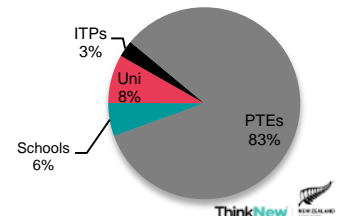
Colombia: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market has experienced significant growth up 38% (122 TSVs) YTD.
- The PTE sector has experienced strong growth YTD up 45% (101).

YTD 2015 sector breakdown of FSVs

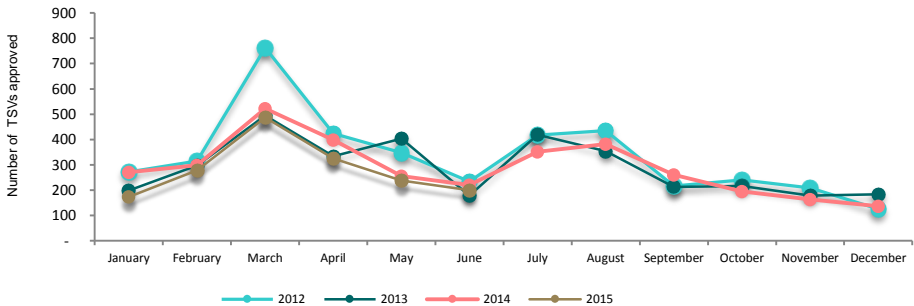


Middle East:

YTD (January to June)

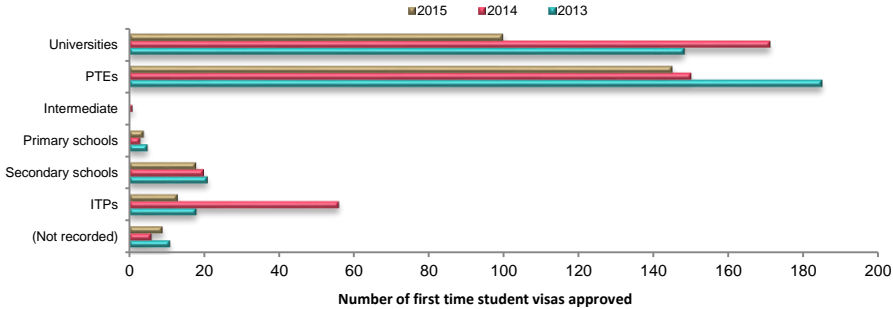
June RSV			June FSV		June TSV		
↓	-5	-3%	↓	-15	↓	-20	-9%

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

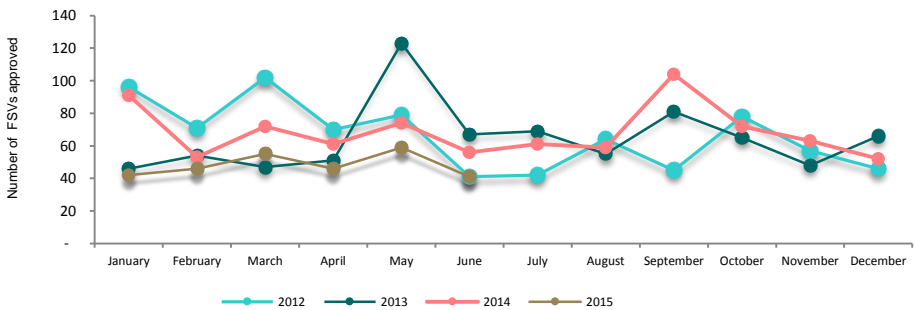


YTD RSV		YTD FSV		YTD TSV	
↓ -148	-9%	↓ -118	-29%	↓ -266	-15%

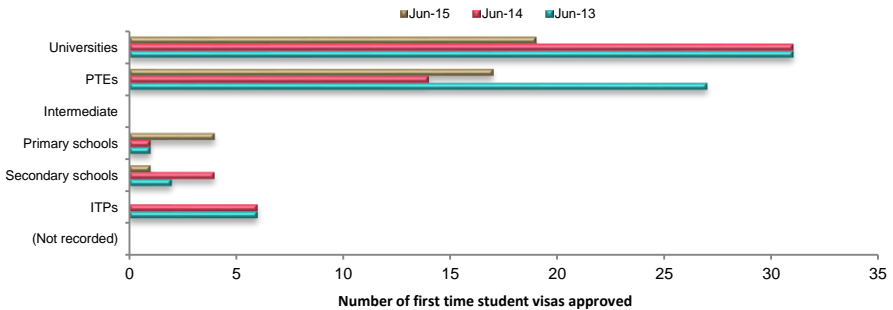
Middle East: First time student visas issued by sector, YTD



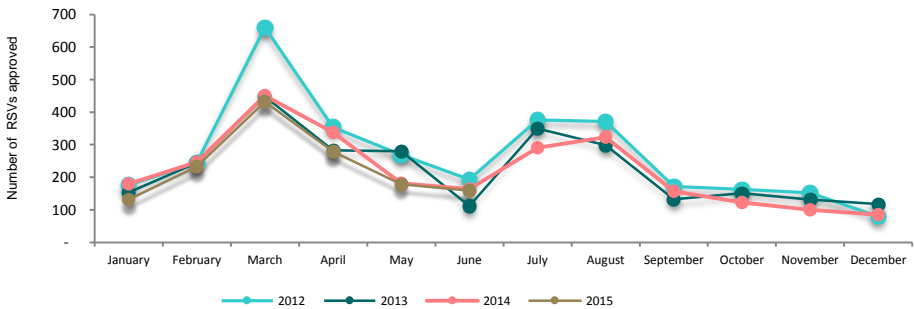
Middle East: First time student visas (FSV) 2012 - 2015



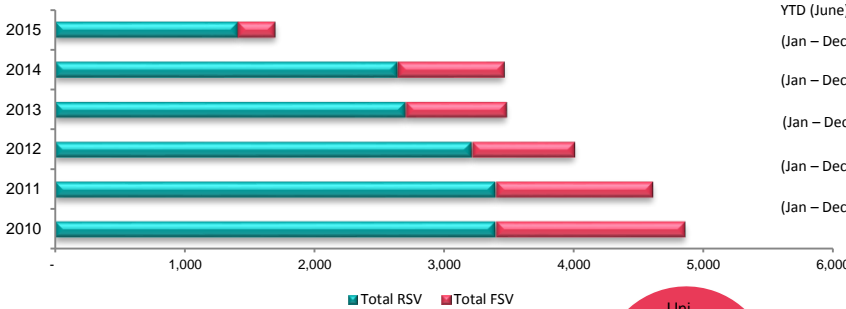
Middle East: First time student visas issued by sector, June



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



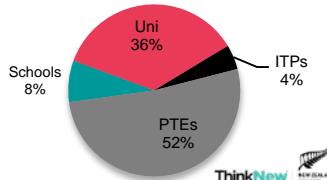
Middle East: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:




- This market continues to experience negative results.
- This decline is driven by a 17% (231) decline in Saudi Arabian TSVs.




YTD 2015 sector breakdown of FSVs



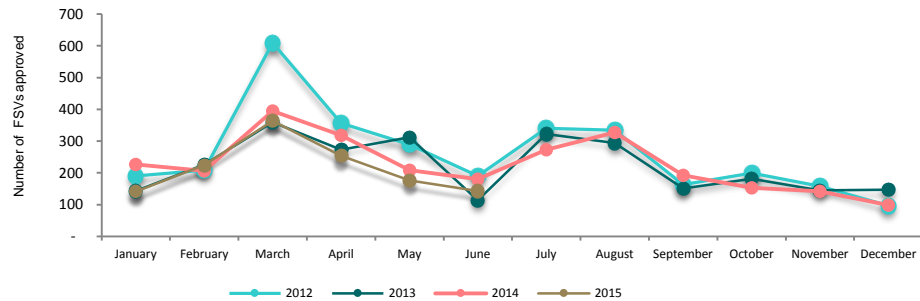
Saudi Arabia:

YTD (January to June)

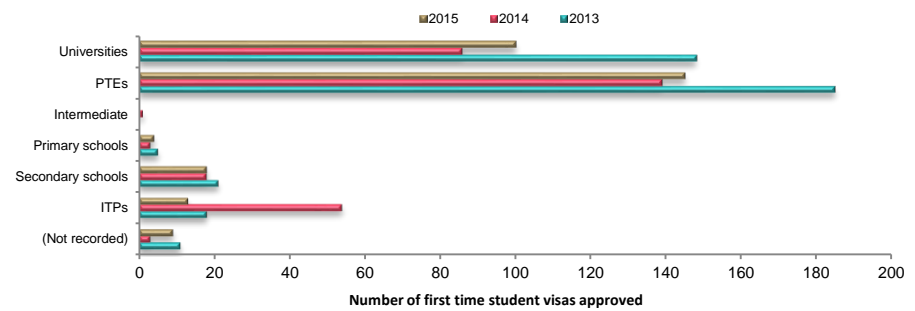
June RSV		June FSV		June TSV	
	-16		-21		-37
	-12%		-49%		-21%

YTD RSV		YTD FSV		YTD TSV	
	-124		-107		-231
	-10%		-35%		-17%

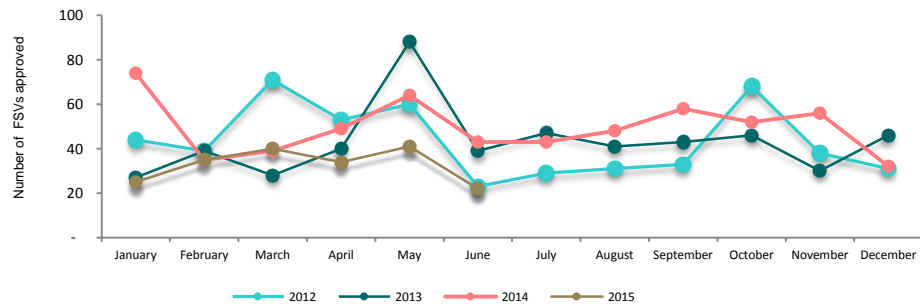
Saudi Arabia: Total student visas approved 2012 - 2015 (TSV)



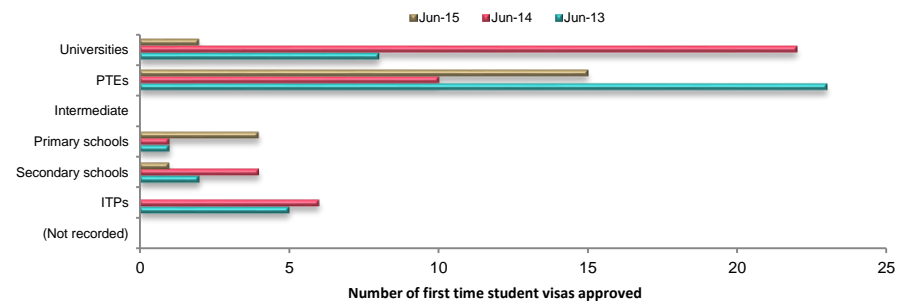
Saudi Arabia: First time student visas issued by sector, YTD



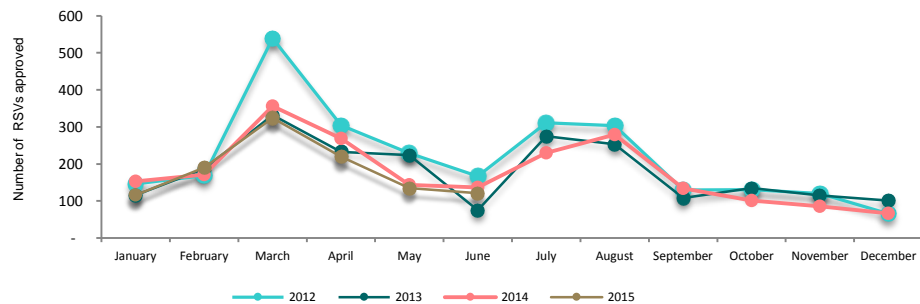
Saudi Arabia: Total first time student visas approved (FSV) 2012 - 2015



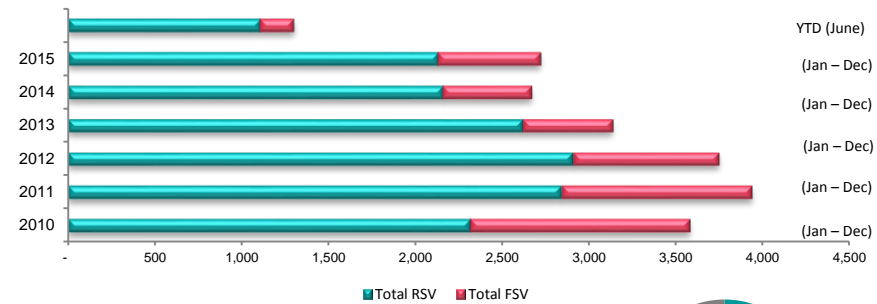
Saudi Arabia: First time student visas issued by sector, June



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



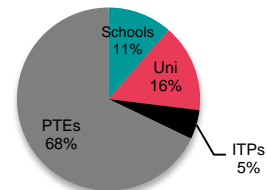
Saudi Arabia: Cumulative total for RSV vs. FSV 2010 - 2015



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.
- There were also slightly fewer university scholarships allocated in January (down from 65 to 40) for Saudi students, which are still being processed.




YTD 2015 sector breakdown of FSVs



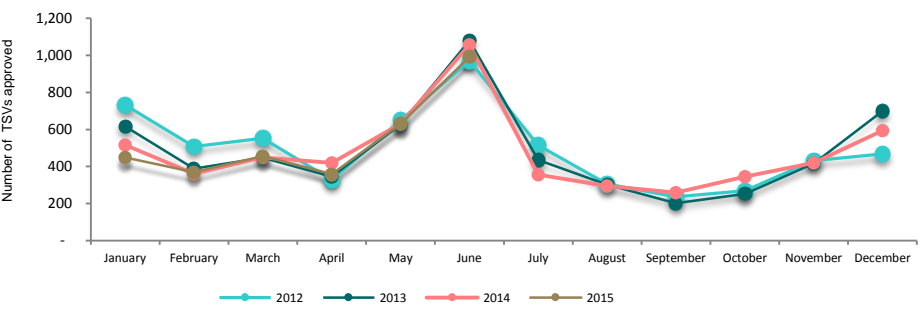
Europe:

YTD (January to June)

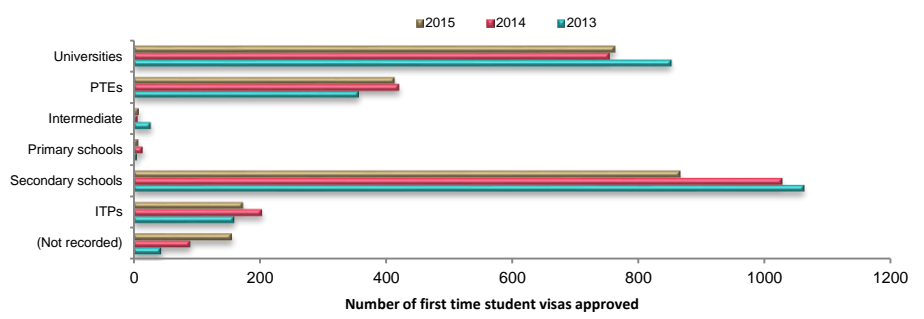
June RSV		June FSV		June TSV	
	-8		-9%		-6%

YTD RSV		YTD FSV		YTD TSV	
	-50		-129		-179
	-5%		-5%		-8%

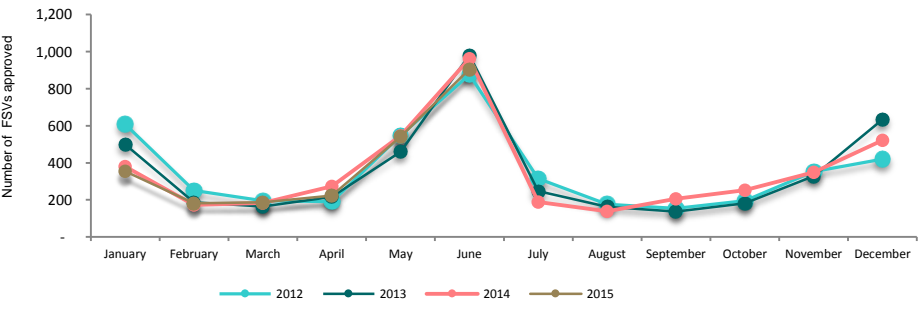
Europe: Total student visas (TSV) 2012 - 2015



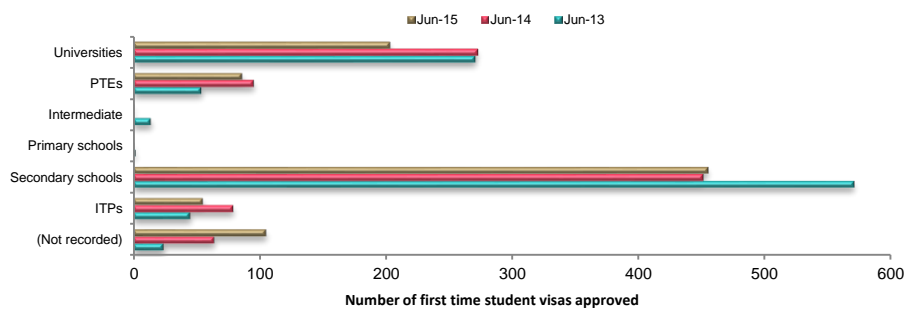
Europe: First time student visas issued by sector, YTD



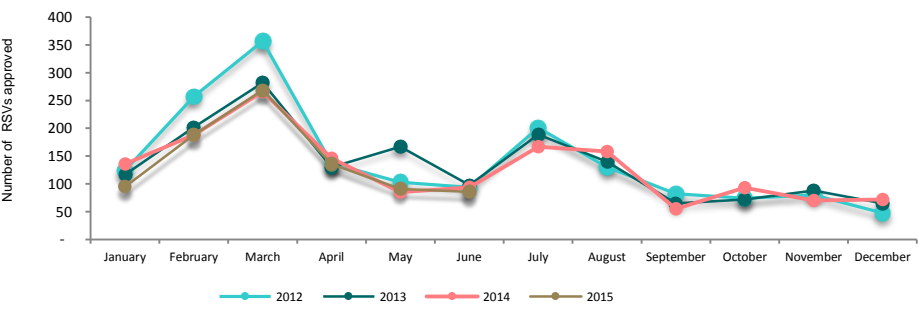
Europe: First time student visas (FSV) 2012 - 2015



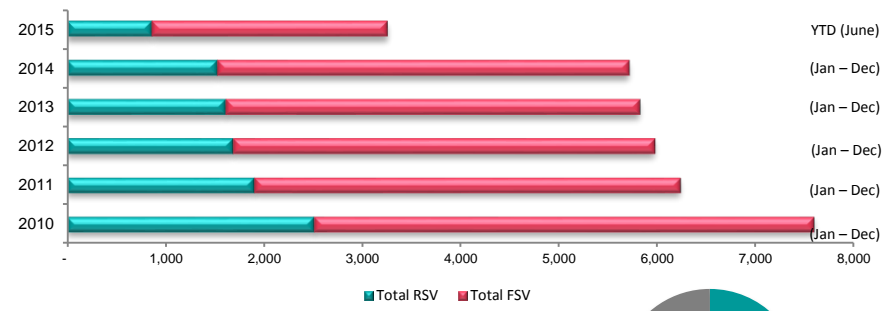
Europe: First time student visas issued by sector, June



Europe: Renewed student visas (RSV) 2012 - 2015



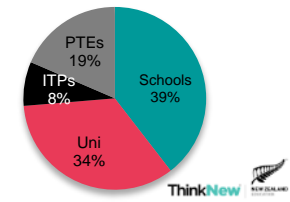
Europe: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- TSVs continue to decline, down 8%.
- The decline is driven by Germany down 20% (144) YTD.

YTD 2015 sector breakdown of FSVs



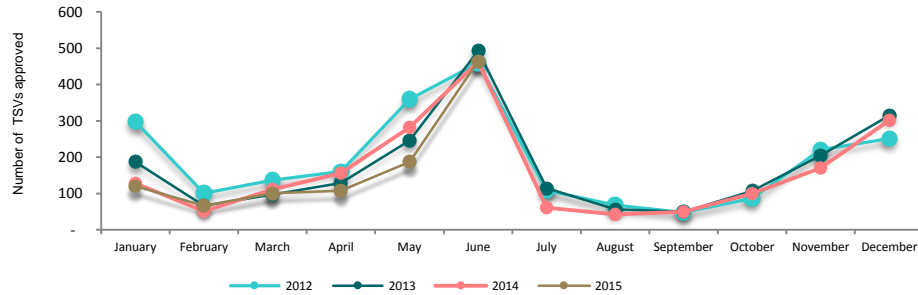
Germany:

YTD (January to June)

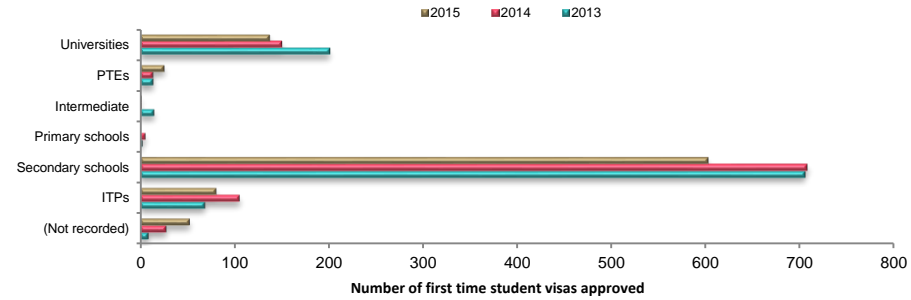
June RSV		June FSV		June TSV	
↓	-10	↑	12	↑	2
	-40%		3%		0%

YTD RSV		YTD FSV		YTD TSV	
↓	-32	↓	-112	↓	-144
	-18%		-11%		-20%

Germany: Total student visas (TSV) 2012 - 2015



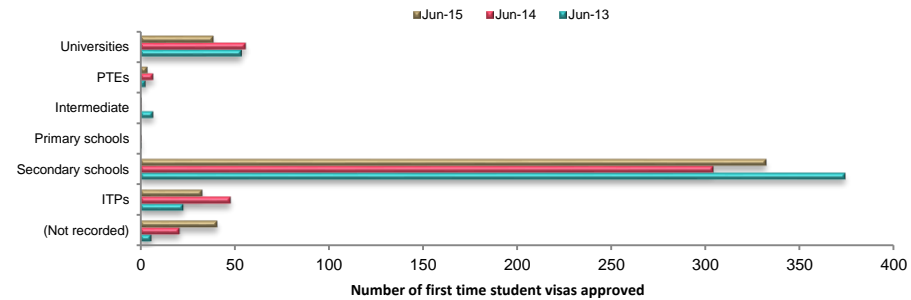
Germany: First time student visas issued by sector, YTD



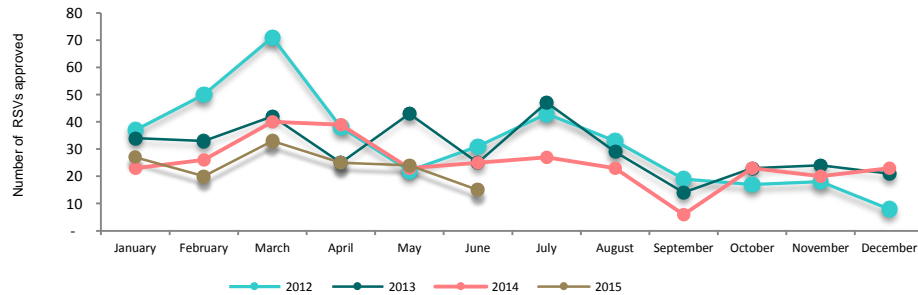
Germany: First time student visas (FSV) 2012 - 2015



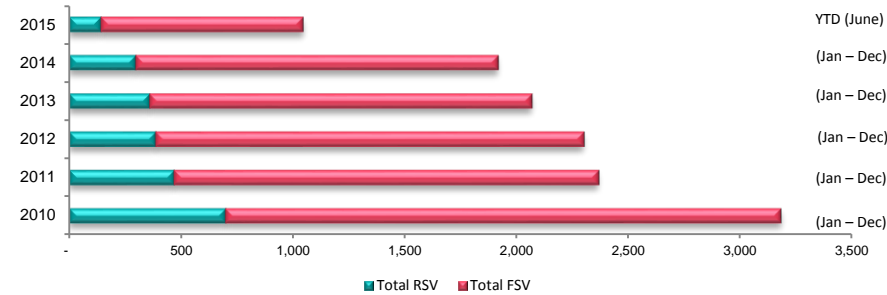
Germany: First time student visas issued by sector, June



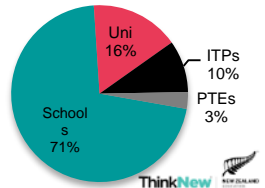
Germany: Renewed student visas (RSV) 2012 - 2015



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





YTD 2015 sector breakdown of FSVs



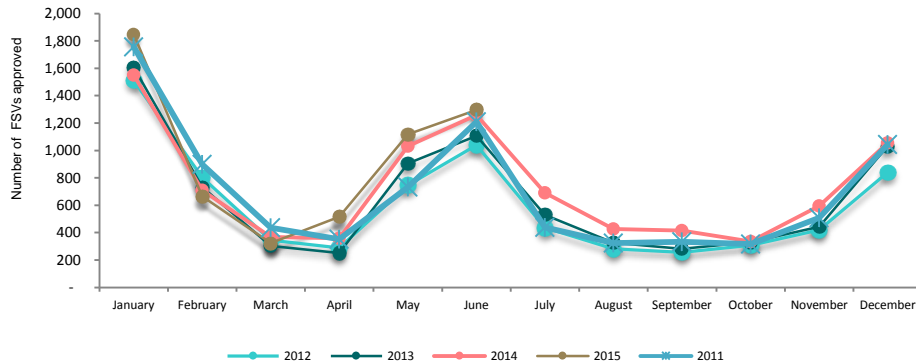
- Takeaways:
- This market continues to decline down 20% (-144).

Overall: First Time Visa Sector overview

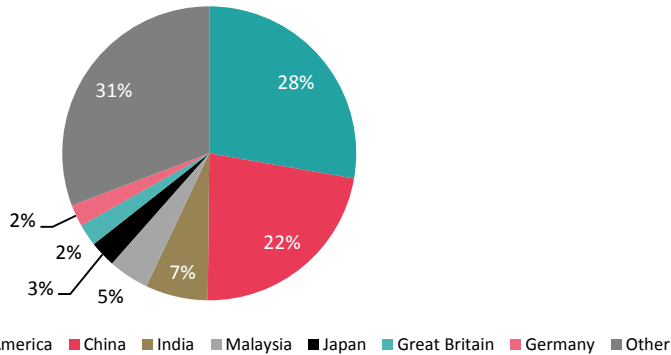
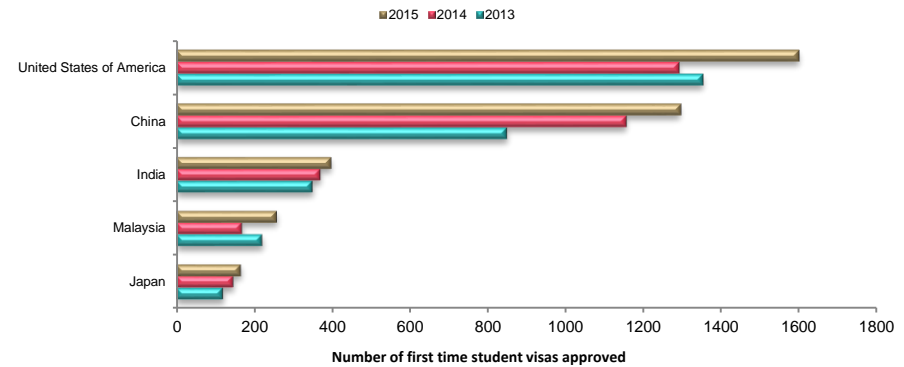
University:

June FSV		YTD FSV	
	37	3%	 491
			9%

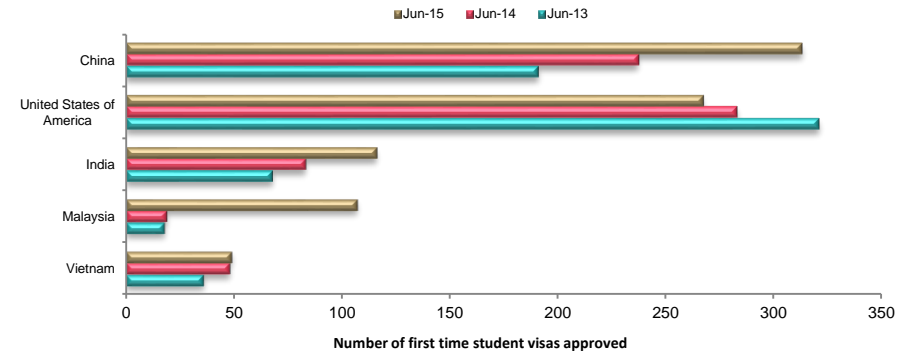
Total first time student visas (FSV) 2012 - 2015



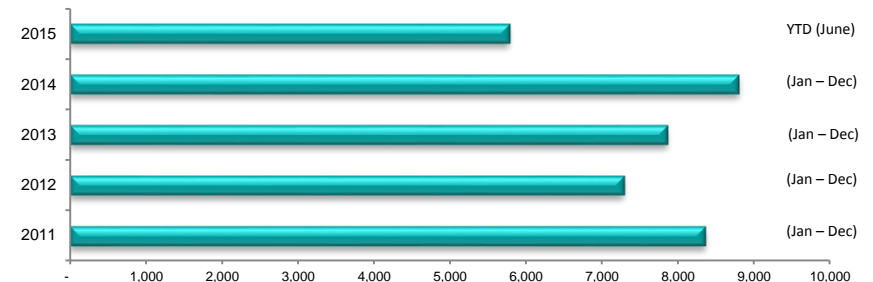
University: First time student visas issued by country, YTD



University: First time student visas issued, June



Cumulative total FSV 2011 - 2015



Takeaways:

- The university sector has started the 2015 year well, up 9% (491).
- This growth was driven by USA, up 24% (308) YTD.
- The USA accounts for 28% of all university FSV approvals YTD.

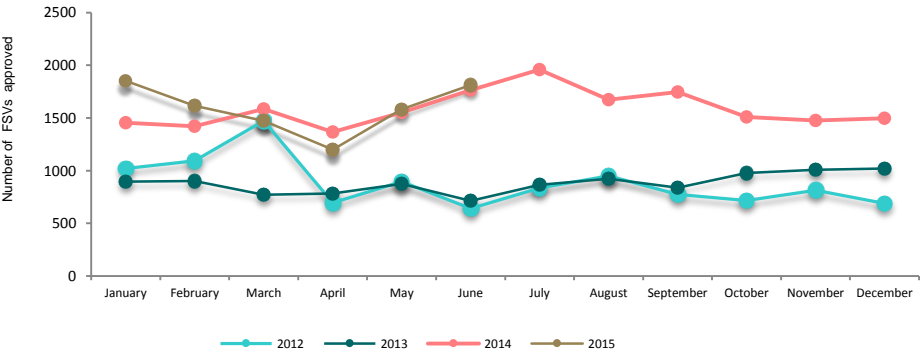
Private Training Establishments (PTE):



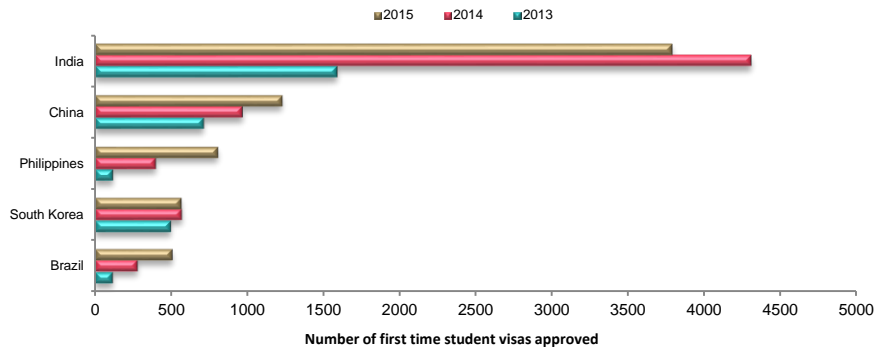
YTD (January to June)

June FSV		YTD FSV	
↑ 49	3%	↑ 390	4%

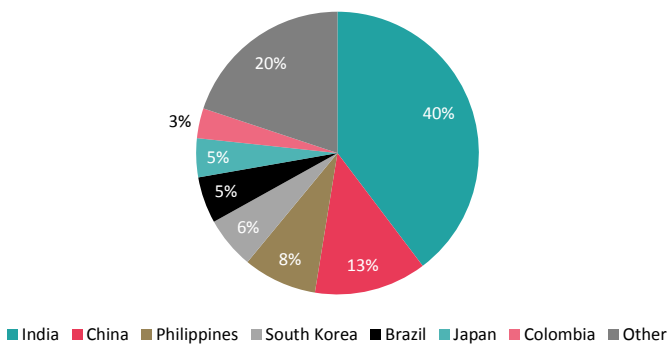
Total first time student visas (FSV) 2012 - 2015



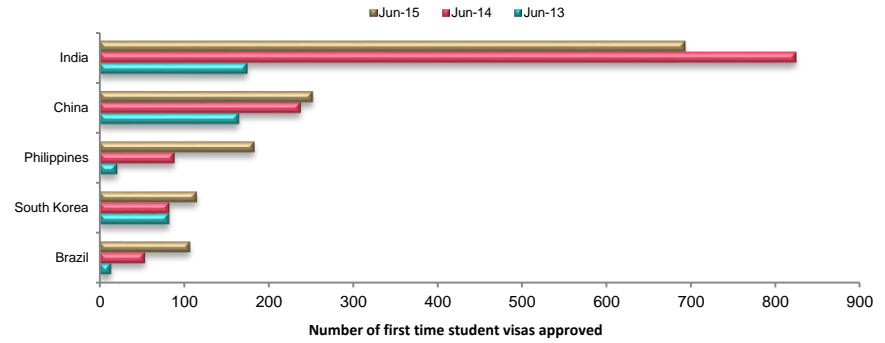
PTEs: First time student visas issued by country, YTD



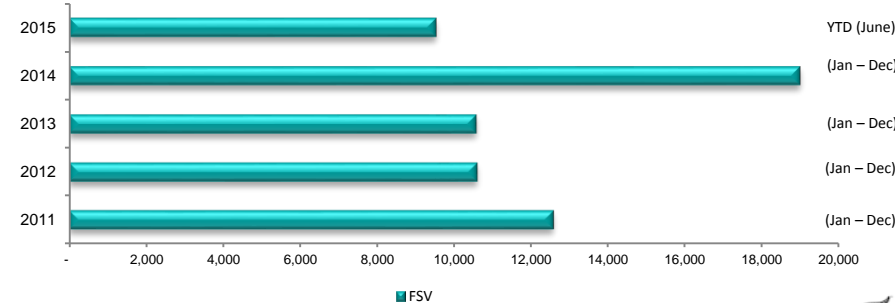
YTD 2015 country breakdown of FSVs



PTEs: First time student visas issued, June



Cumulative total FSV 2011 - 2015



Takeaways:

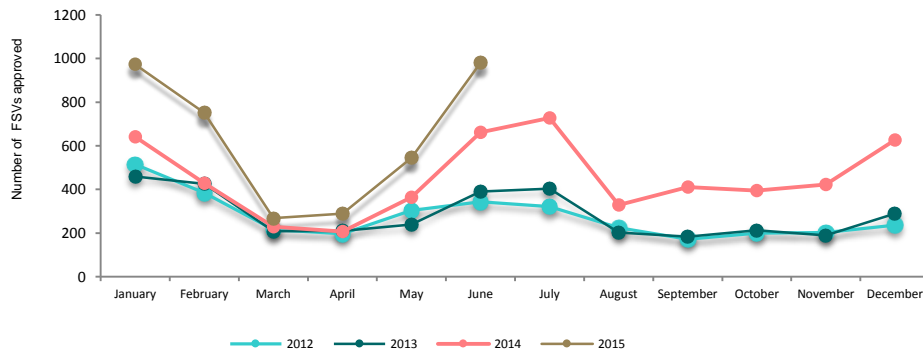
- Following a strong finish to 2014, 2015 is also tracking strong up 4% (390).
- Declines from the Indian market has slowed overall growth.

Institutes of Technology and Polytechnics (ITPs):

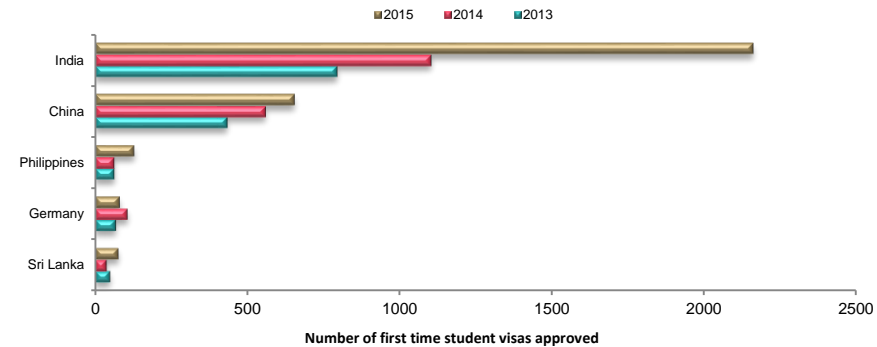
YTD (January to June)

June FSV		YTD FSV	
↑ 319	48%	↑ 1,276	50%

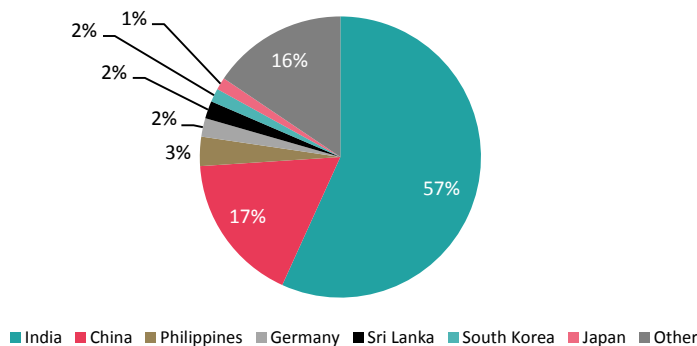
Total first time student visas (FSV) 2012 - 2015



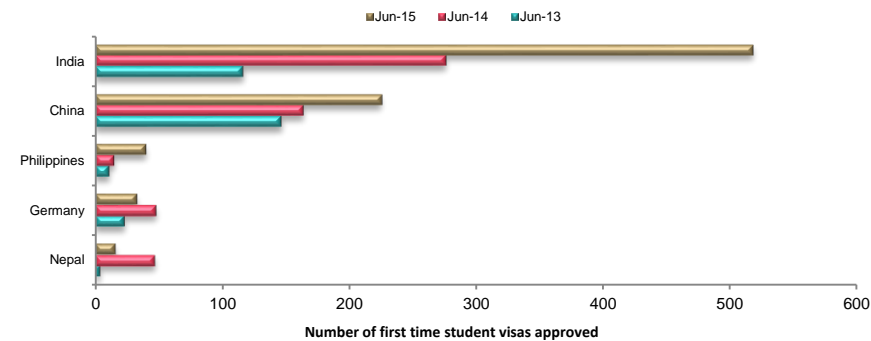
ITPs: First time student visas issued by country, YTD



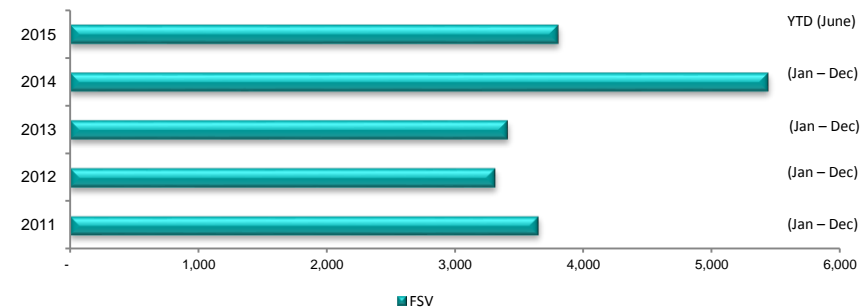
YTD 2015 country breakdown of FSVs



ITPs: First time student visas issued, June



Cumulative total FSV 2011 - 2015



Takeaways:

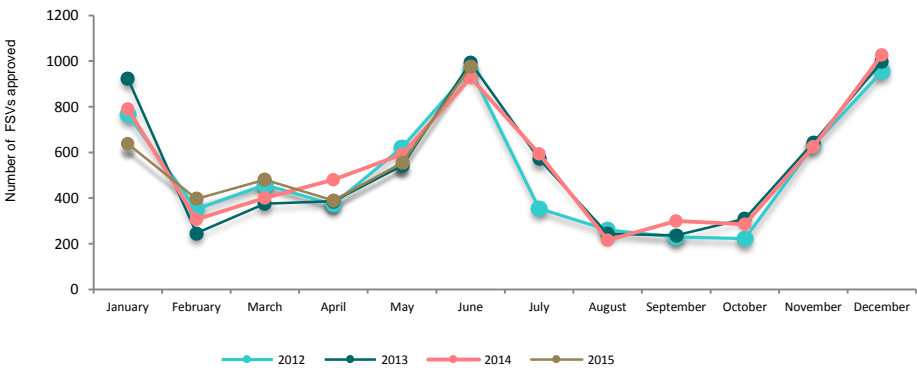
- After experiencing a strong 2014, the ITP sector has continued to see strong growth, up 50% (1,276) YTD.
- This growth was driven by the Indian market which represents 57% of all FSVs approved YTD.

Secondary schools:

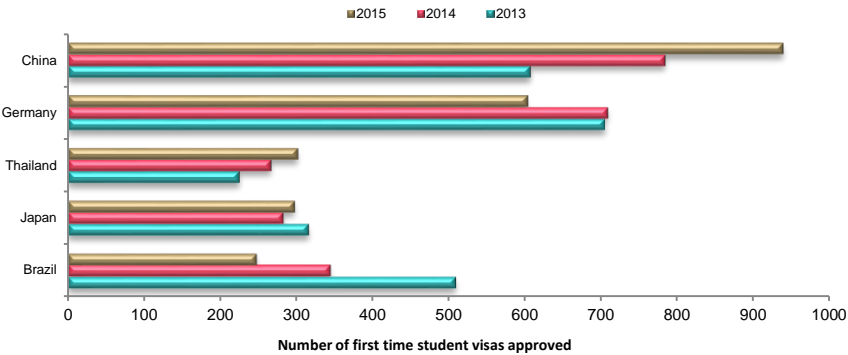
YTD (January to June)

June FSV		YTD FSV	
	47	5%	 -61
			-2%

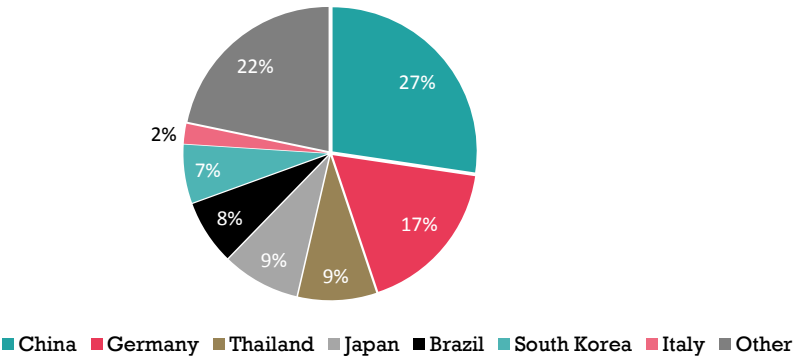
Total first time student visas (FSV) 2012 - 2015



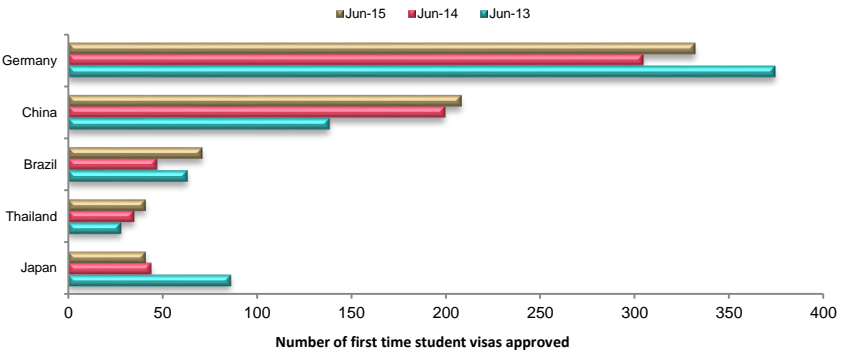
Secondary schools: First time student visas issued by country, YTD



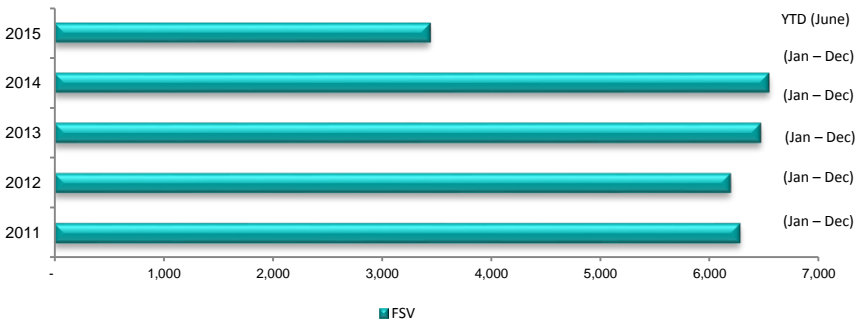
YTD 2015 country breakdown of FSVs



Secondary schools: First time student visas issued, June





Cumulative total FSV 2011 - 2015



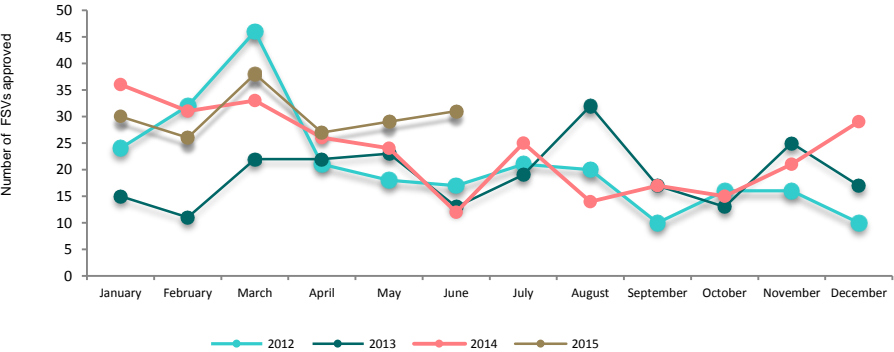
Takeaways:

- This sector has been tracking flat down 2% (-61), which was driven by a loss in scholarship students from Latin America in January.

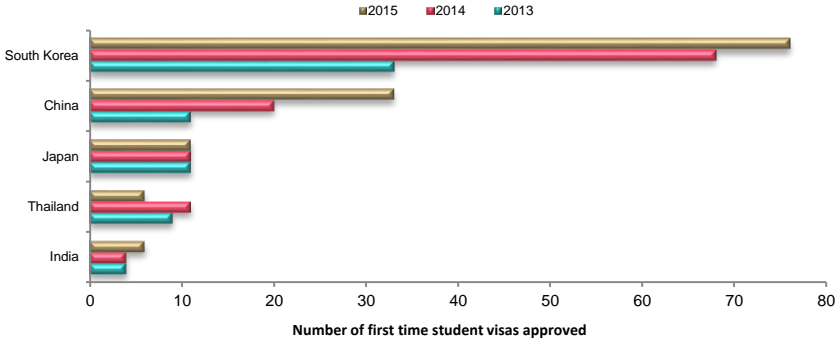
Primary schools:

June FSV		YTD FSV	
 19	158%	 19	12%

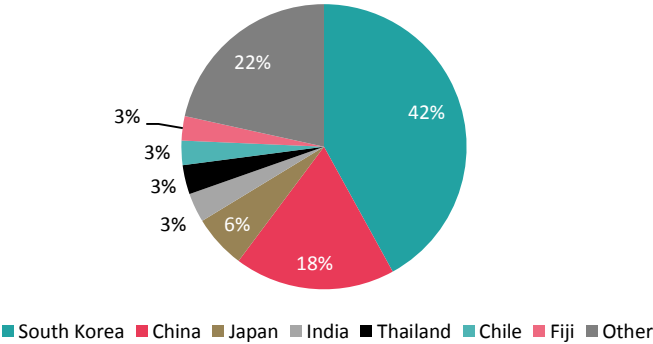
Total first time student visas (FSV) 2012 - 2015



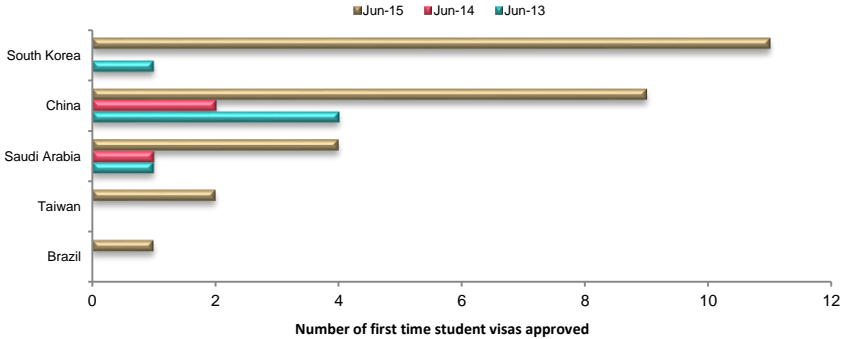
Primary schools: First time student visas issued by country, YTD



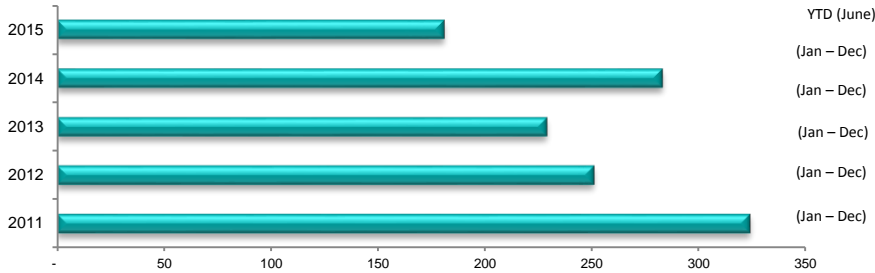
YTD 2015 country breakdown of FSVs



Primary schools: First time student visas issued, June



Cumulative total FSV 2011 - 2015

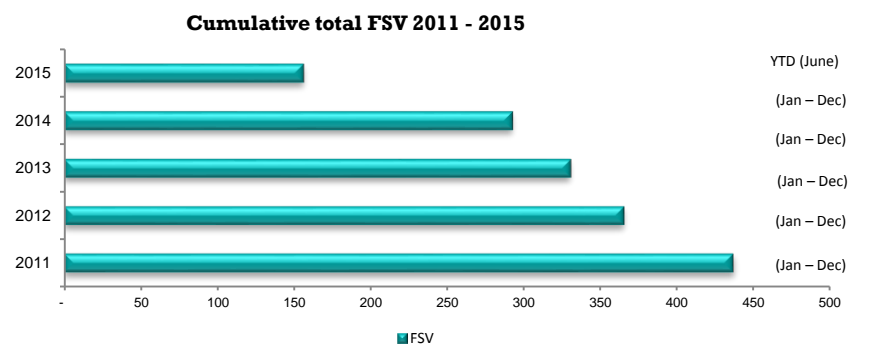
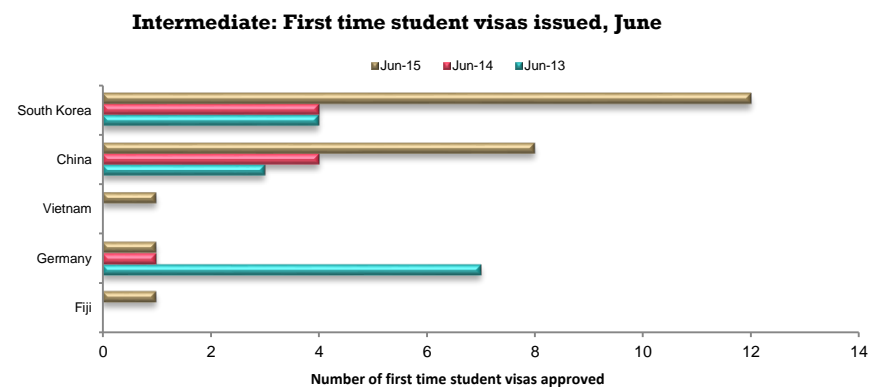
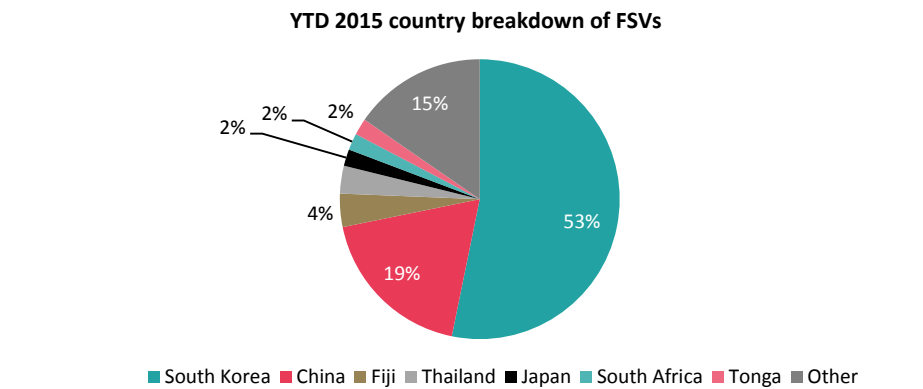
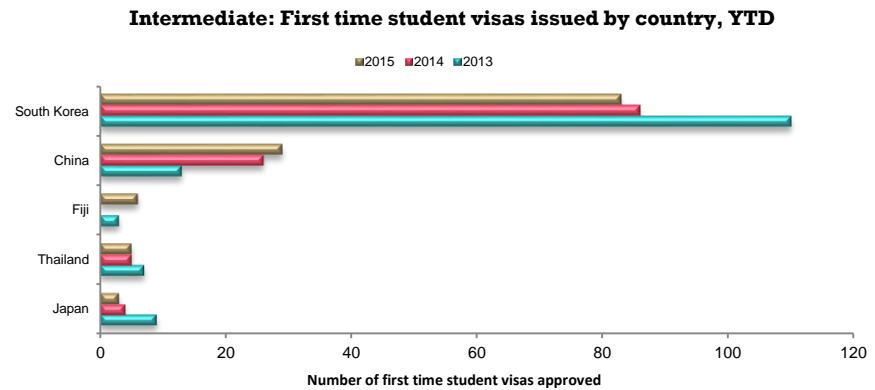
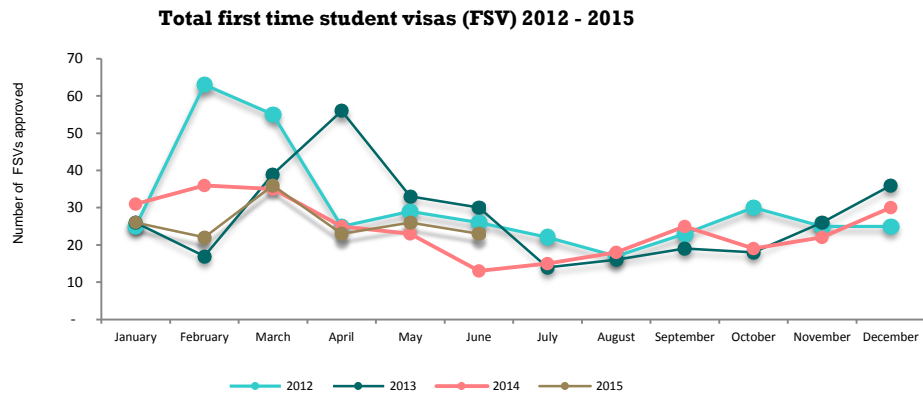


- Takeaways:
- A strong June sees a 12% (19) growth YTD.
 - June saw strong growth in Korean and Chinese FSVs.

Intermediate schools:

YTD (January to June)

June FSV		YTD FSV	
 10	77%	 -7	-4%



Takeaways:

- This sector experienced a 4% decline YTD.