

Student Visa Dashboard

May 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 methodology underpinning this and future Dashboards has been revised to exclude dependents. Dashboards prior to the May 2015 include approvals from “all” applicants, including dependents.
- 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

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:

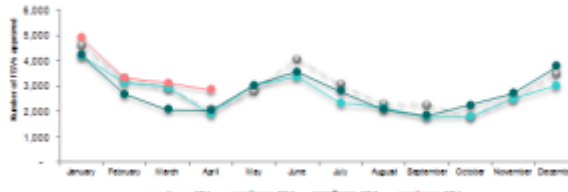
April RSV	April FSV	April TSV
- 45 -1%	833 41%	788 13%

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

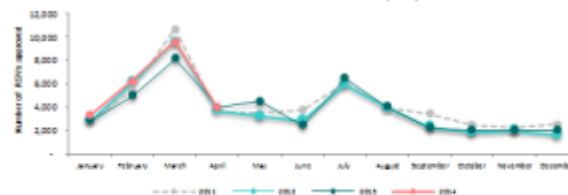
Overall: Total student visas (TSV) 2011 - 2014



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



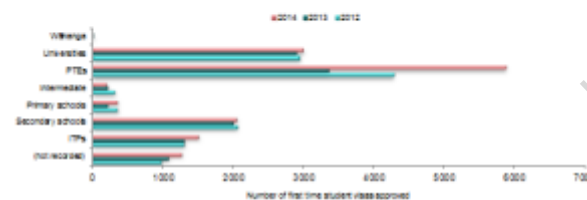
Overall: Renewed student visas (RSV) 2011 - 2014



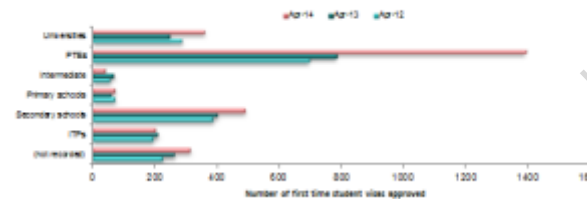
Takeaways:

- 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

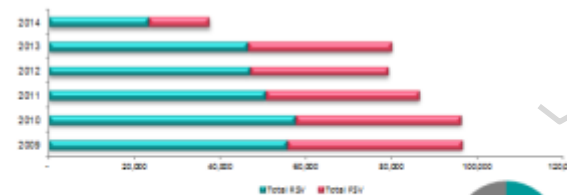
Overall: First time student visas issued by sector, YTD



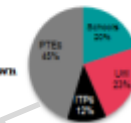
Overall: First time student visas issued by sector, April



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 8% (3,110) and first time student visas (FSV) up 11% (1,742). Returning student visas were also up 6% (1,368).
- YTD growth has been driven by China, India, the Philippines, the United States and Brazil.
- The ITP, universities and PTE sectors have experienced the strongest YTD growth up 52% (973), 11% (460) and 5% (381).

May:

- May saw an 11% (617) TSV growth and a 8% (298) FSV growth on May 2014.
- The growth was driven by China, India, the Philippines, Korea and Brazil.
- All sectors, with the exception of secondary schools, experienced growth.

Increases

TSVs for May	Change	% change
China	214	14%
India	165	12%
Philippines	109	110%
Korea	39	14%
Brazil	29	35%

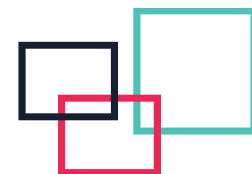
FSVs for May	Change	% change
China	121	18%
Philippines	112	147%
USA	32	7%
Brazil	27	42%
Sri Lanka	26	124%

Sector FSVs for May	Change	% change
ITPs	189	52%
Universities	88	9%
PTEs	48	3%
Primary	5	21%
Intermediate	3	13%
Secondary school	-36	-6%

Decreases

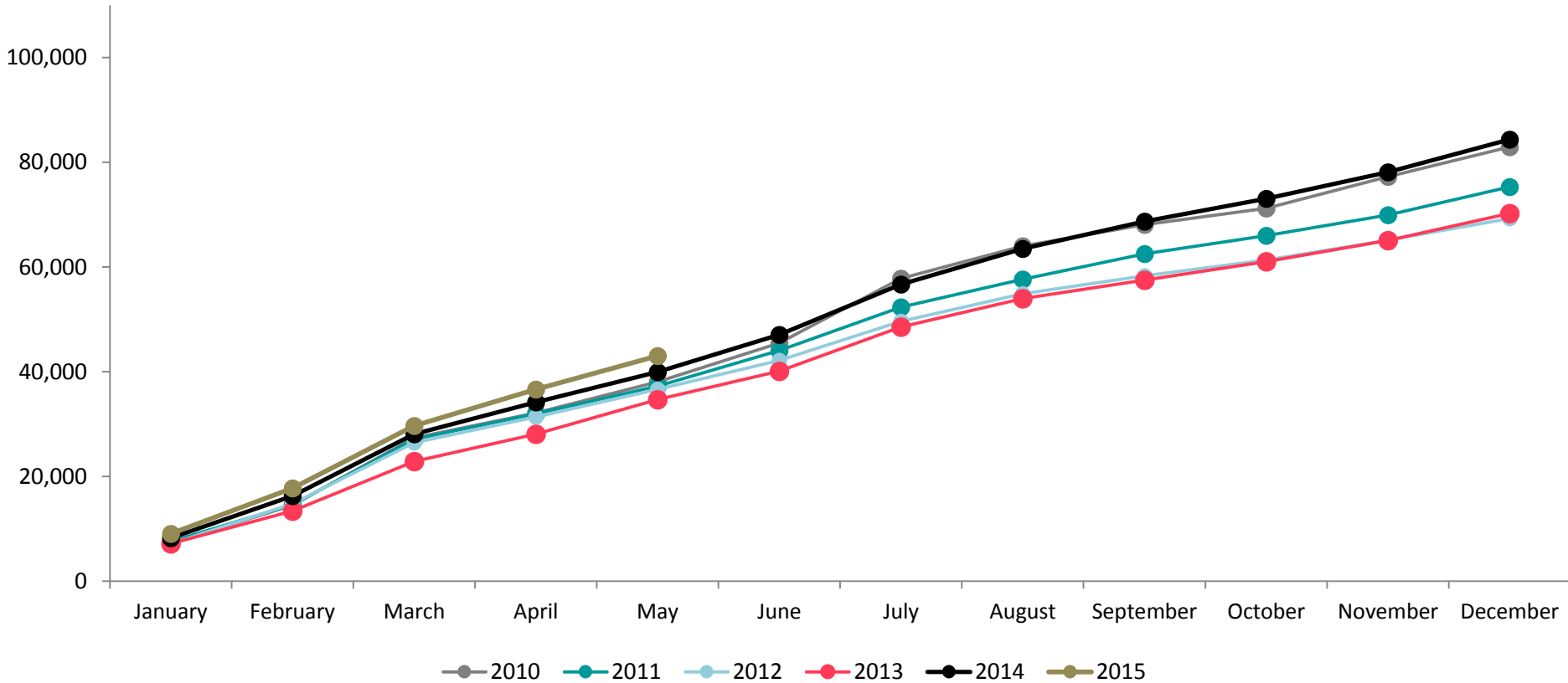
Taiwan	-11	-50%
Nepal	-19	-33%
Thailand	-21	-13%
Saudi Arabia	-33	-16%
Germany	-94	-33%

Thailand	-10	-11%
Saudi Arabia	-23	-36%
Nepal	-25	64%
India	-36	-4%
Germany	-96	-37%



Tracker: Cumulative total

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Takeaways:

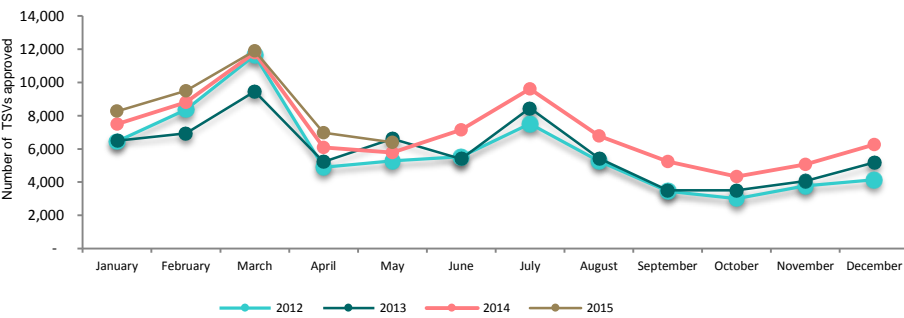
- 2015 is currently tracking above previous years.



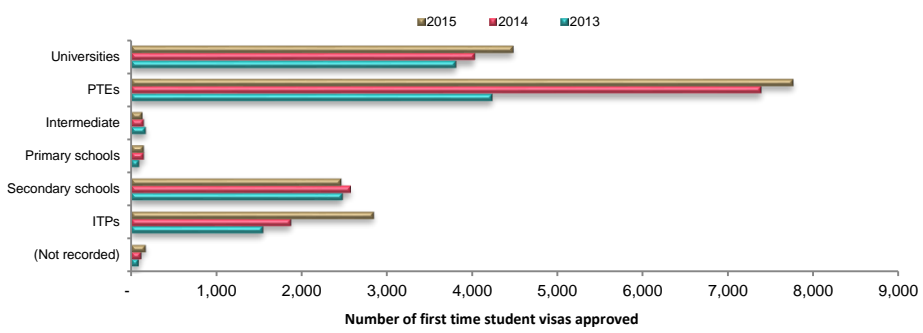
May RSV		May FSV		May TSV	
↑	319	15%	↑	298	8%
↑	617	11%			

YTD RSV		YTD FSV		YTD TSV	
↑	1,368	6%	↑	1,742	11%
↑	3,110	8%			

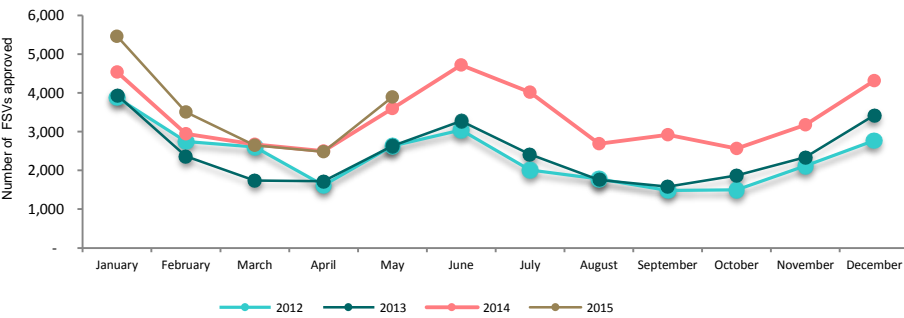
Overall: Total student visas (TSV) 2012 - 2015



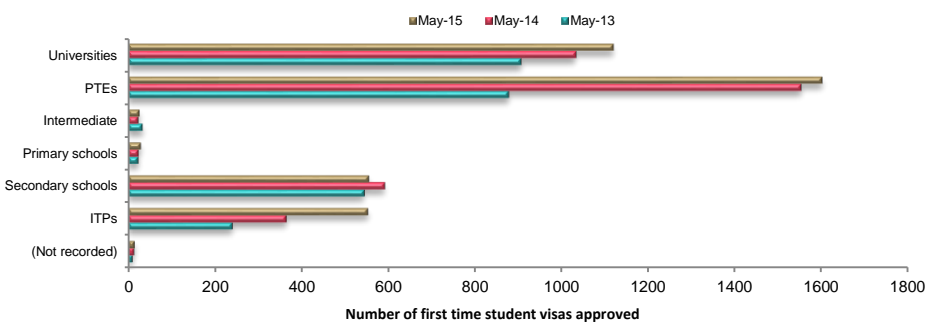
Overall: First time student visas issued by sector, YTD



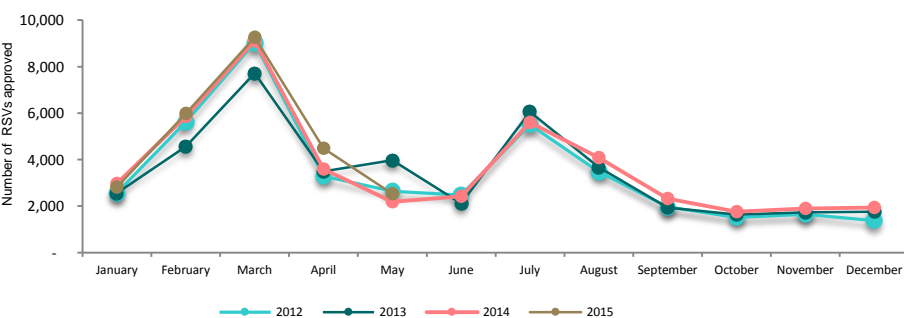
Overall: First time student visas (FSV) 2012 - 2015



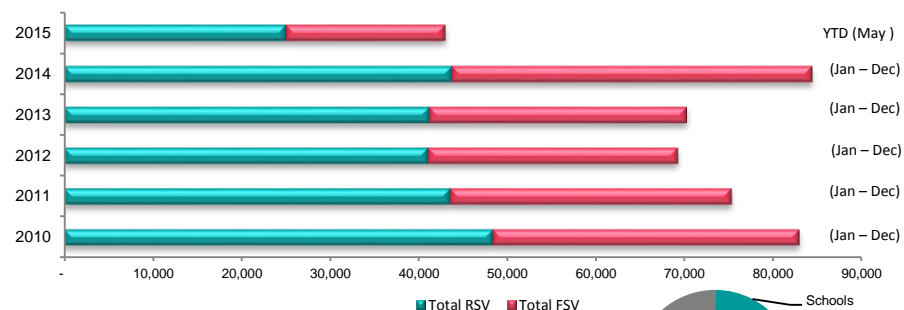
Overall: First time student visas issued by sector, May



Overall: Renewed student visas (RSV) 2012 - 2015



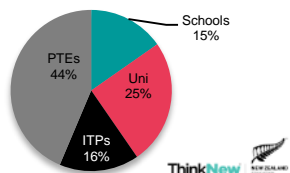
Overall: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

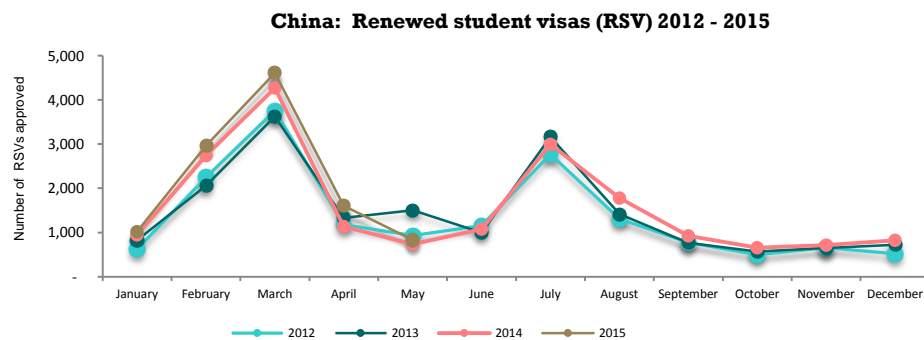
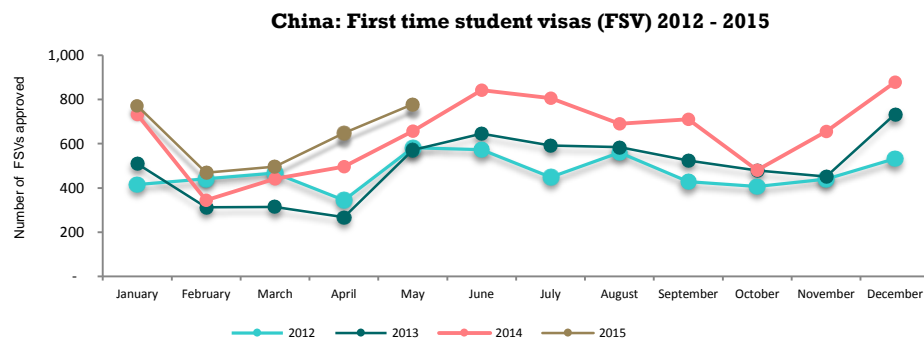
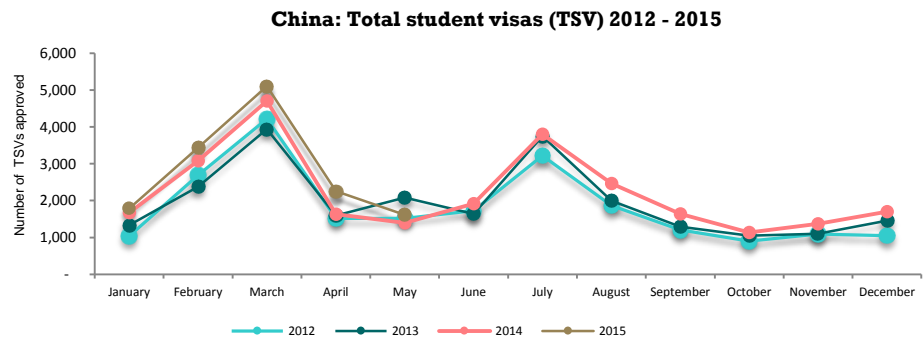
- TSVs and FSVs have experienced a strong start for the 2015 academic year up 8% (3,110).
- YTD there has been strong growth in the universities, ITPs and PTE sectors up 11%, 52%, and 5%.

YTD 2015 sector breakdown of FSVs



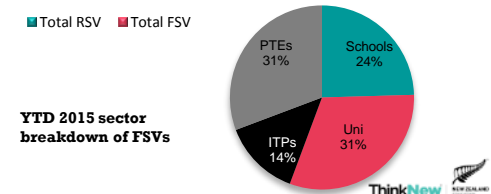
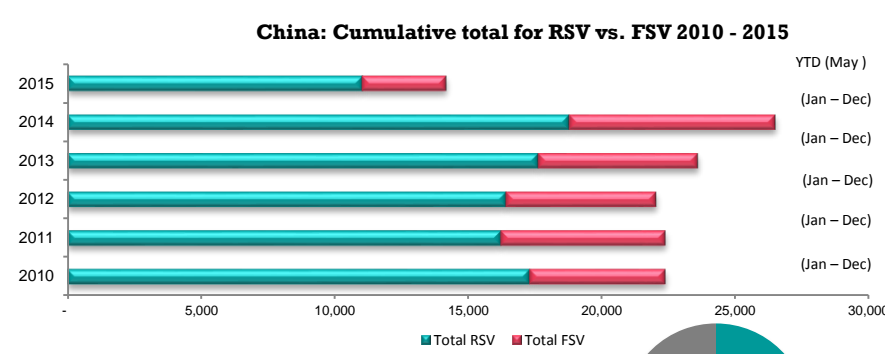
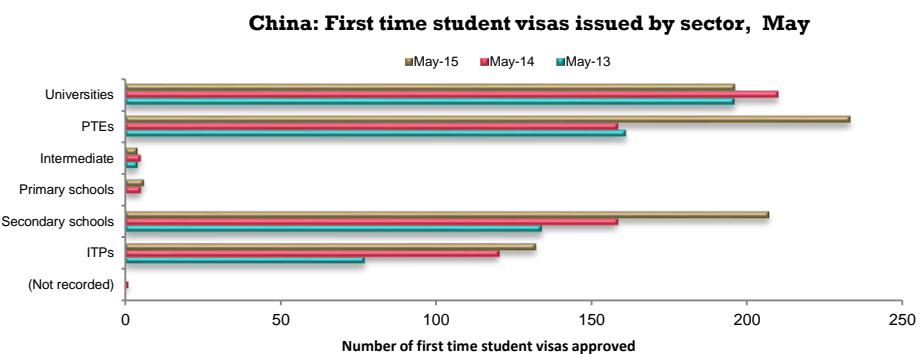
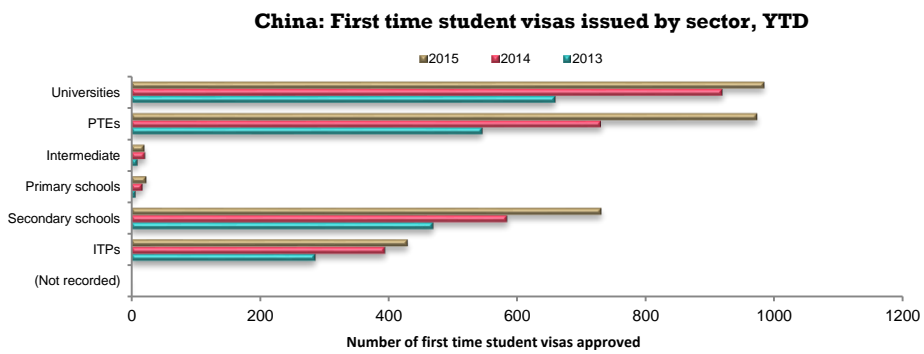
China:

May RSV			May FSV		May TSV			
↑	95	13%	↑	121	18%	↑	216	15%



YTD (January to May)

YTD RSV		YTD FSV		YTD TSV	
↑ 1,204	12%	↑ 492	18%	↑ 1,696	14%



- Takeaways:**
- China experienced a strong start to 2015 up 14% (1,696) YTD in TSVs.
 - With the exception of the intermediate school sector, all sectors have experienced growth.

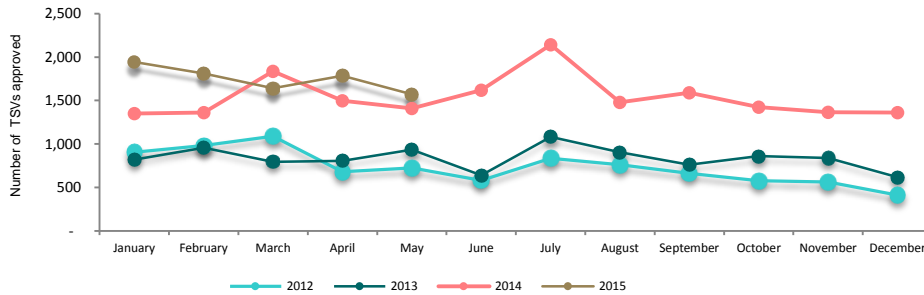
India:

YTD (January to May)

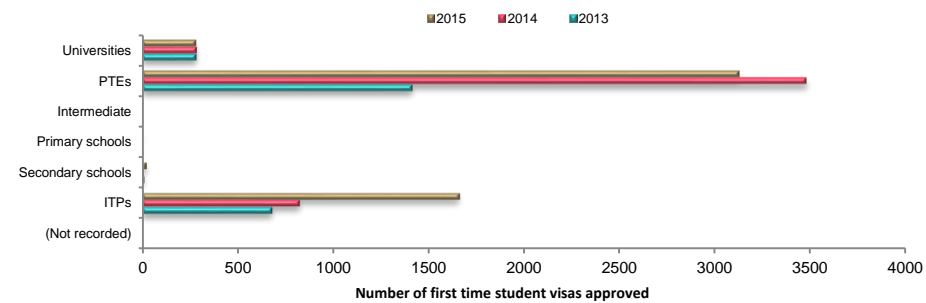
May RSV		May FSV		May TSV	
↑ 201	42%	↓ -36	-4%	↑ 165	12%

YTD RSV		YTD FSV		YTD TSV	
↑ 807	28%	↑ 490	11%	↑ 1,297	17%

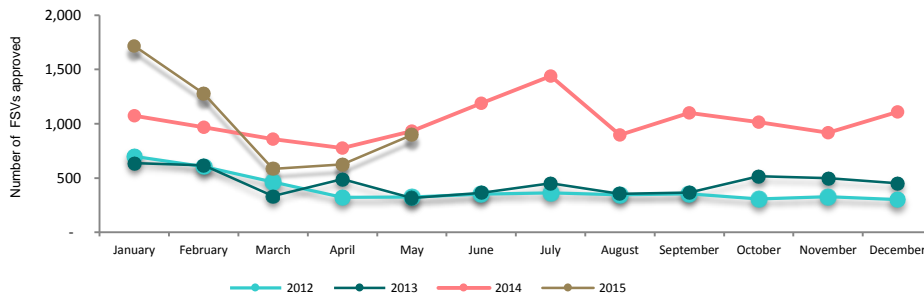
India: Total student visas (TSV) 2012 - 2015



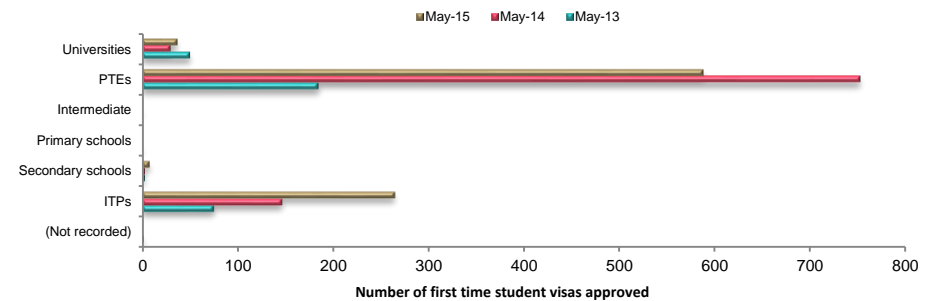
India: First time student visas issued by sector, YTD



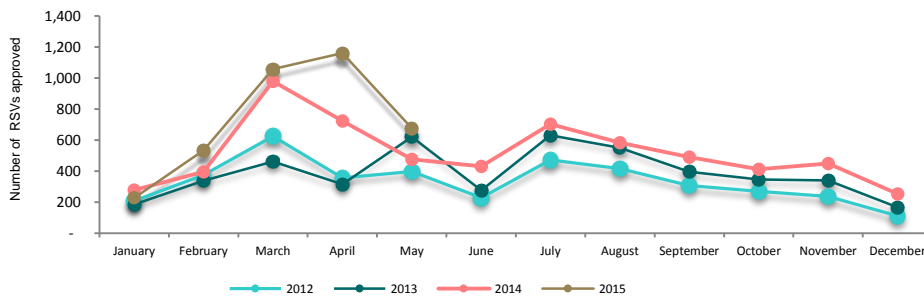
India: First time student visas (FSV) 2012 - 2015



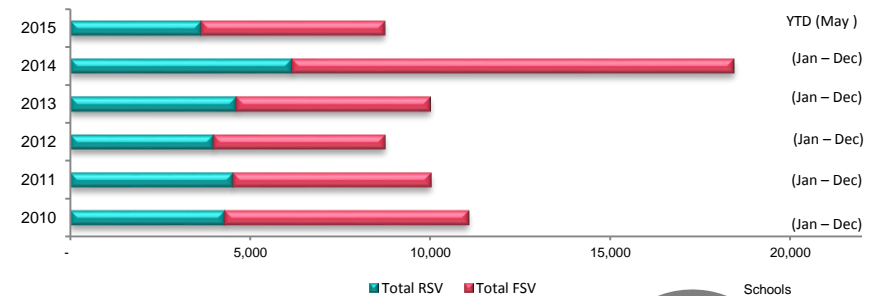
India: First time student visas issued by sector, May



India: Renewed student visas (RSV) 2012 - 2015



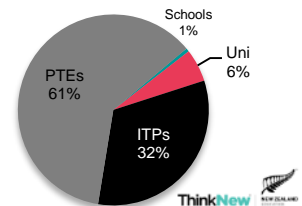
India: Cumulative total for RSV vs. FSV 2010 - 2015






Takeaways:

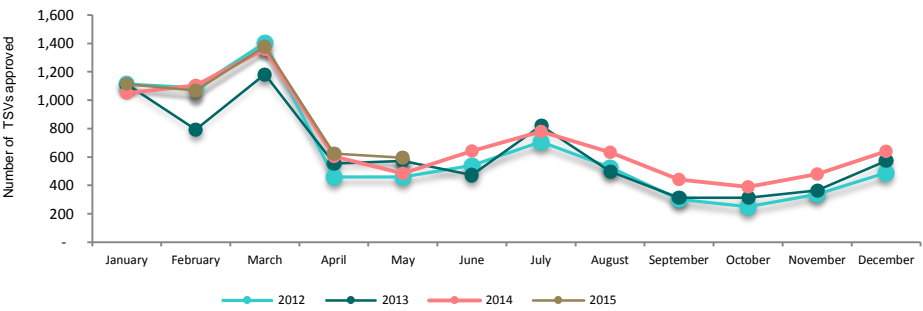
- Indian TSVs are tracking positively, up 17% (1,297) YTD.
- FSVs have experienced three consecutive months of declines, driven by declines in PTE students.
- ITP FSVs continue to see strong growth up 101% (832) YTD. May saw a strong result up 80% (264).

YTD 2015 sector breakdown of FSVs

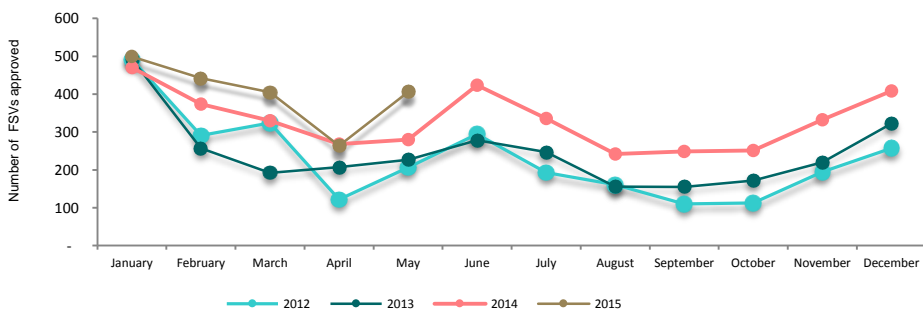


May RSV		May FSV		May TSV	
 -15	-7%	 126	45%	 111	23%

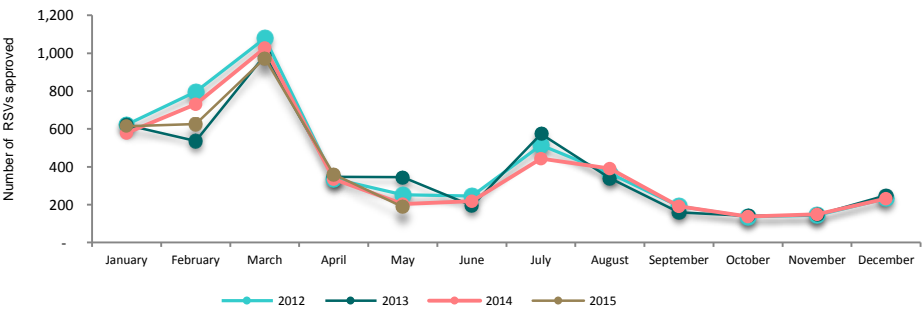
ASEAN: Total student visas (TSV) 2012 - 2015






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

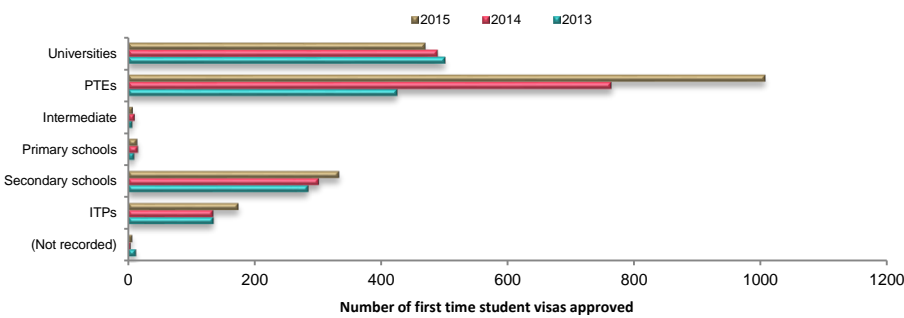


ASEAN: Renewed student visas (RSV) 2012 - 2015

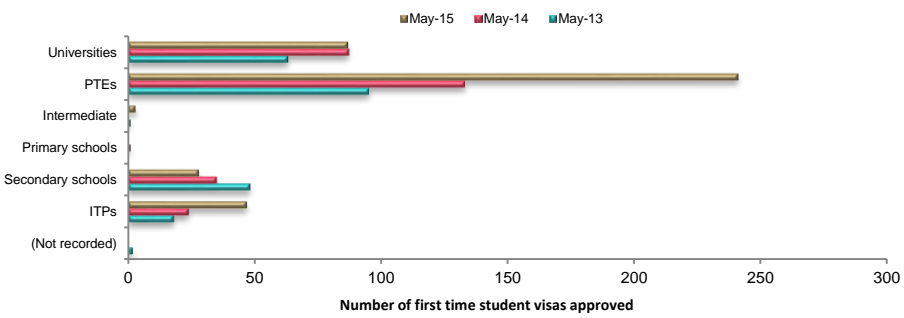


YTD RSV		YTD FSV		YTD TSV	
 -113	-4%	 294	17%	 181	4%

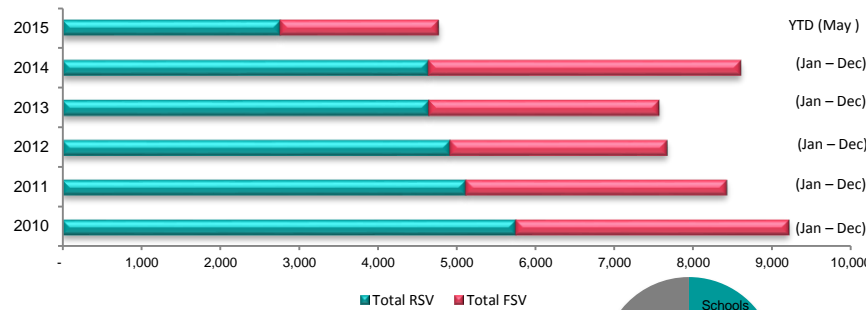
ASEAN: First time student visas issued by sector, YTD



ASEAN: First time student visas issued by sector, May



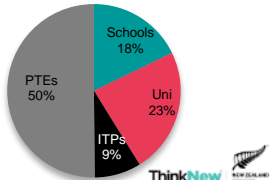
ASEAN: Cumulative total for RSV vs. FSV 2010 - 2015






Takeaways:




- The ASEAN market experienced steady growth in 2015. A decline in RSVs has slowed the YTD TSV position.
- FSVs have seen strong growth up 17% (294) YTD and 45% (126) in May. This growth is primarily driven by growth in Filipino PTE students.

YTD 2015 sector breakdown of FSVs



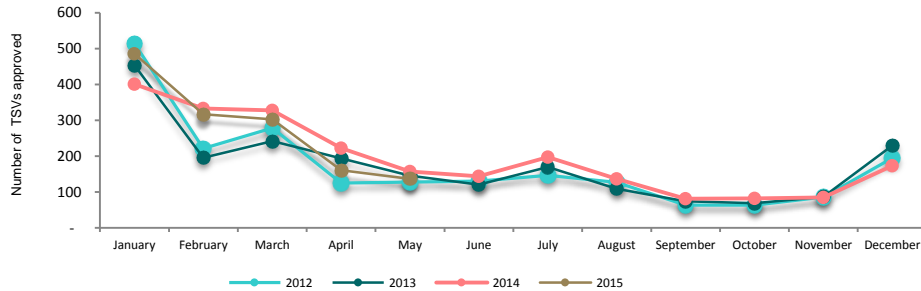
Thailand:

May RSV		May FSV		May TSV	
	-11		-10		-21
	-17%		-11%		-13%

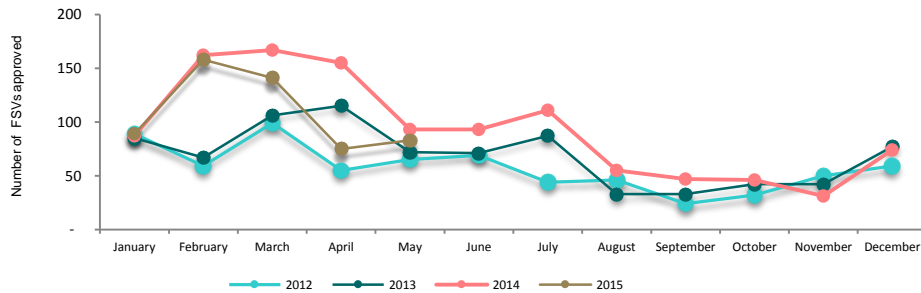
YTD RSV		YTD FSV		YTD TSV	
	78		-118		-40
	10%		-18%		-3%

YTD (January to May)

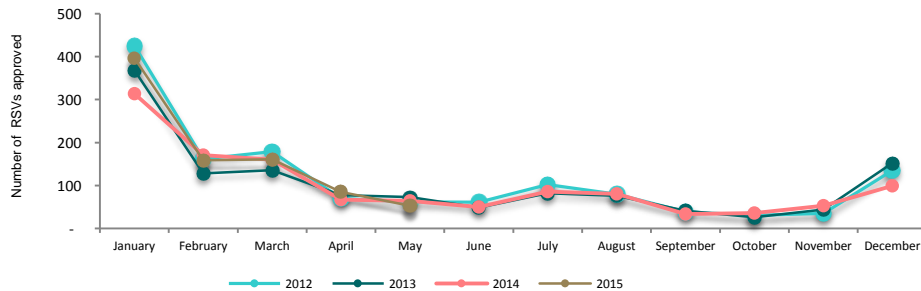
Thailand: Total student visas (TSV) 2012 - 2015



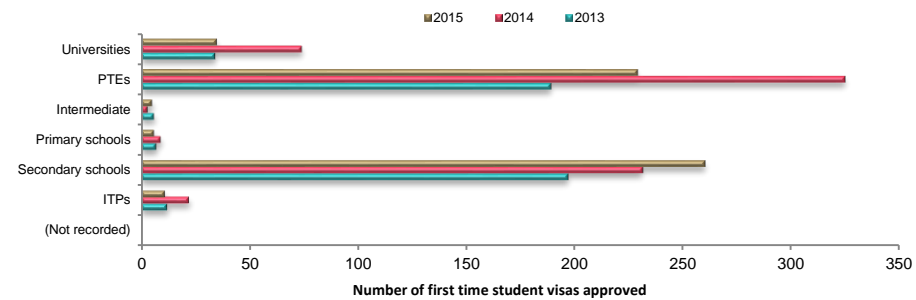
Thailand: First time student visas (FSV) 2012 - 2015



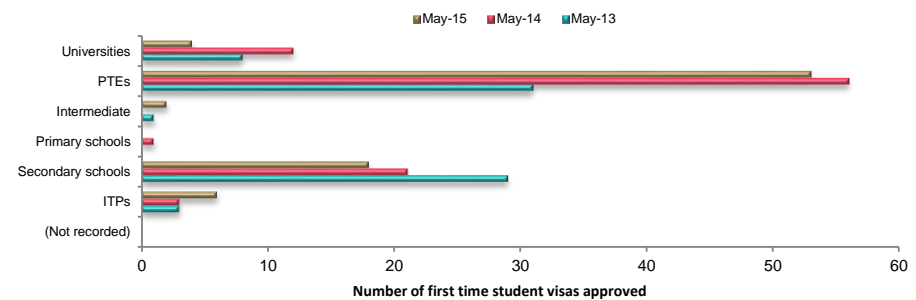
Thailand: Renewed student visas (RSV) 2012 - 2015



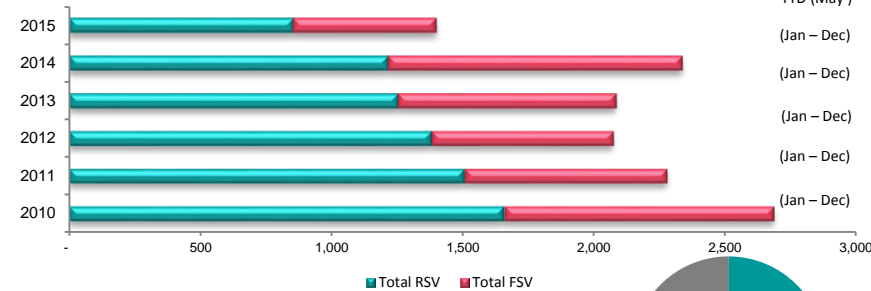
Thailand: First time student visas issued by sector, YTD



Thailand: First time student visas issued by sector, May



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



YTD (May)

(Jan - Dec)

(Jan - Dec)

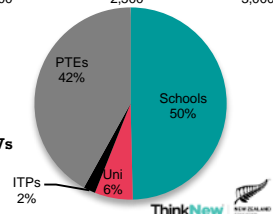
(Jan - Dec)

(Jan - Dec)

(Jan - Dec)

(Jan - Dec)

YTD 2015 sector
breakdown of FSVs

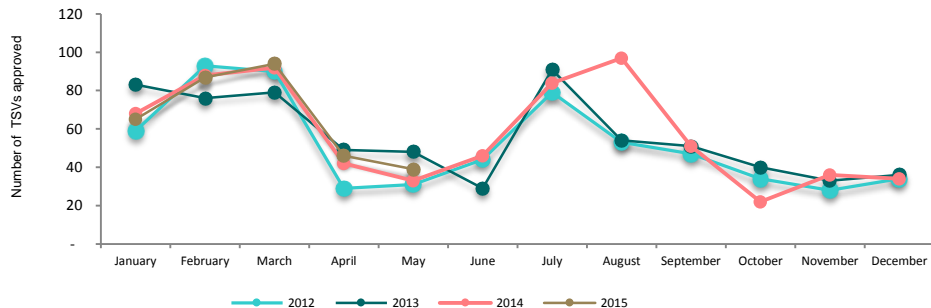


Takeaways:

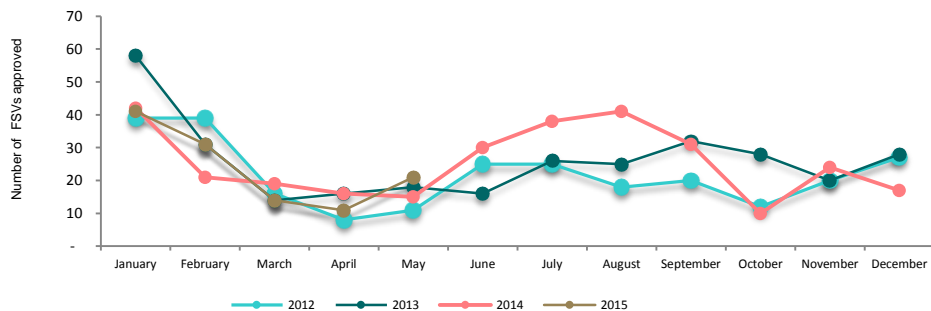
- This market is tracking flat on 2014 down 3% (-40) in TSVs.
- The secondary school sector has experienced strong growth up 13% (260) YTD.

May RSV		May FSV		May TSV	
➡ 0	0%	⬆ 6	40%	⬆ 6	18%

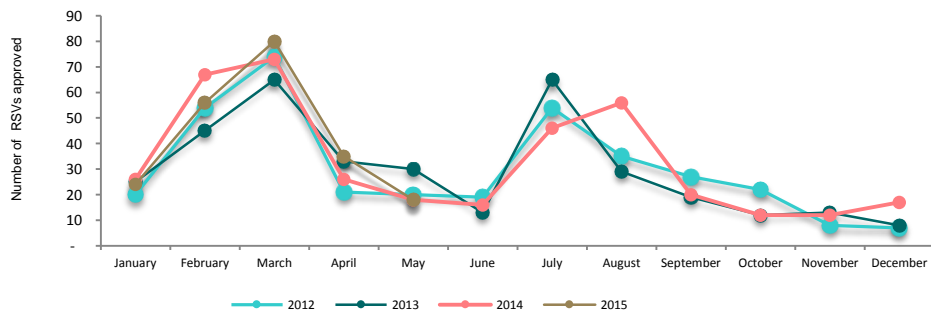
Indonesia: Total student visas (TSV) 2012 - 2015



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

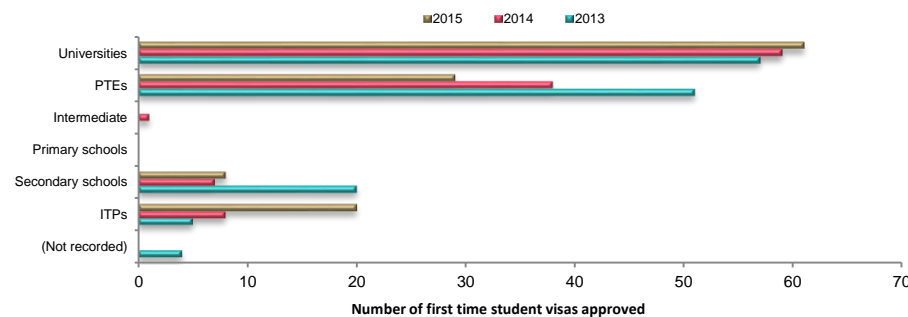


Indonesia: Renewed student visas (RSV) 2012 - 2015

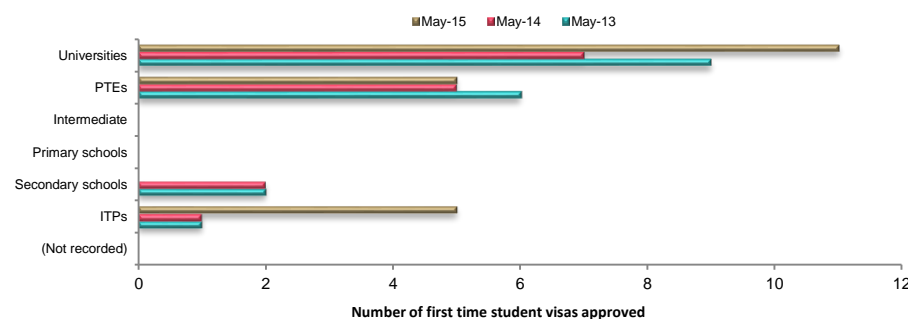


YTD RSV		YTD FSV		YTD TSV	
⬆ 3	1%	⬆ 5	4%	⬆ 8	2%

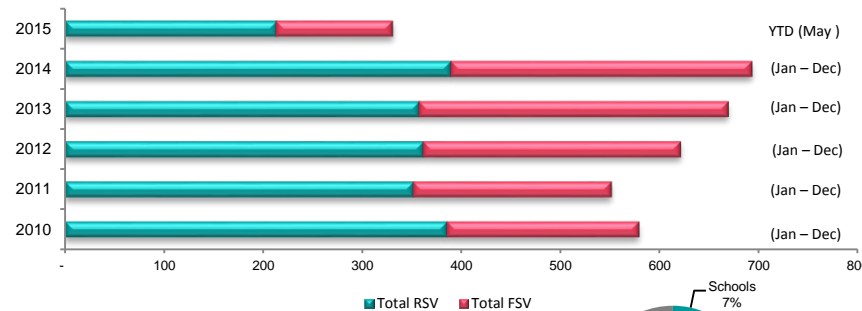
Indonesia: First time student visas issued by sector, YTD



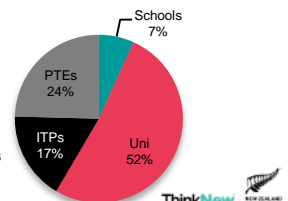
Indonesia: First time student visas issued by sector, May



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



YTD 2015 sector breakdown of FSVs

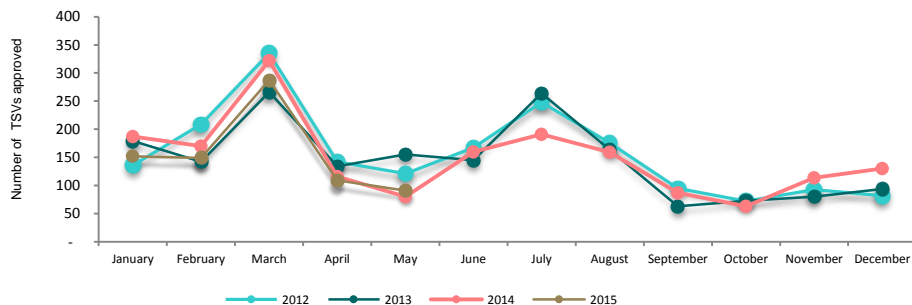


- Takeaways:
- Overall this market is tracking flat, up 2% (8) in TSVs YTD.
 - Signals from the market suggest that the strong New Zealand dollar coupled with strong competitor recruitment from European countries is slowing growth.

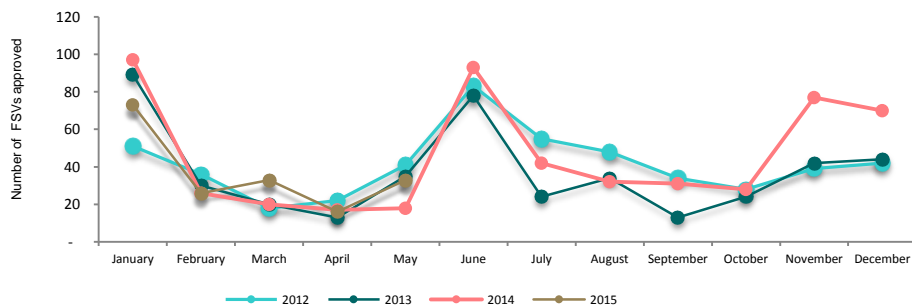
May RSV		May FSV		May TSV	
↓	-4	↑	15	↑	11
	-6%		83%		14%

YTD RSV		YTD FSV		YTD TSV	
↓	-90	↑	3	↓	-87
	-13%		2%		-10%

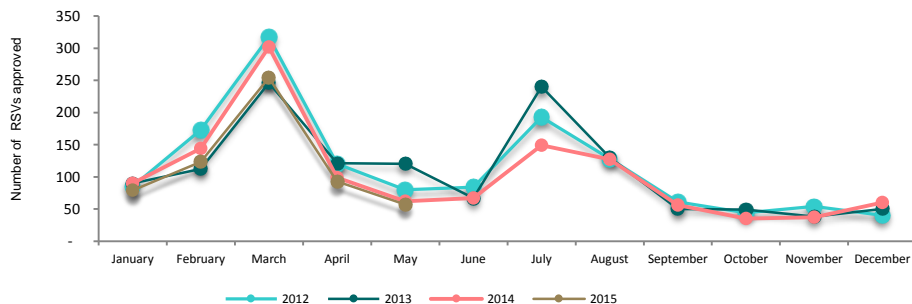
Viet Nam: Total student visas (TSV) 2012 - 2015



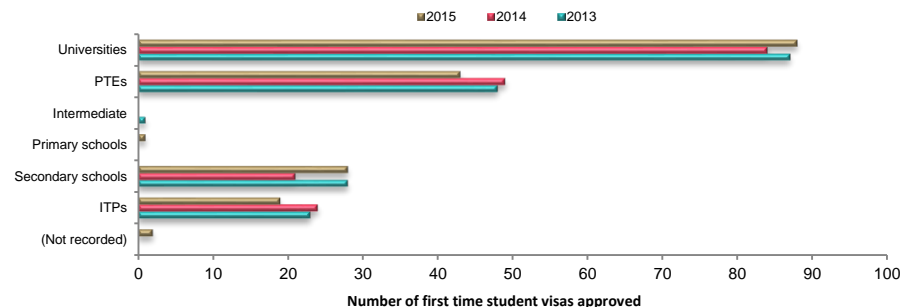
Viet Nam: First time student visas (FSV) 2012 - 2015



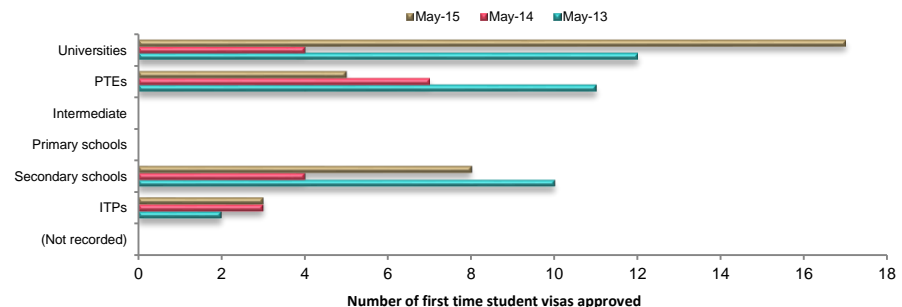
Viet Nam: Renewed student visas (RSV) 2012 - 2015



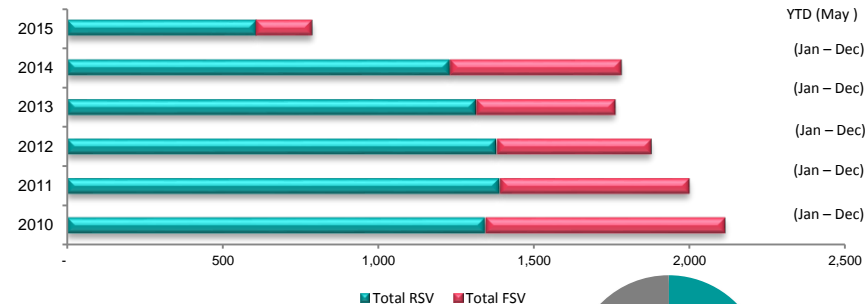
Viet Nam: First time student visas issued by sector, YTD



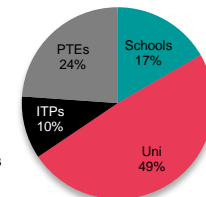
Viet Nam: First time student visas issued by sector, May



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



YTD 2015 sector breakdown of FSVs



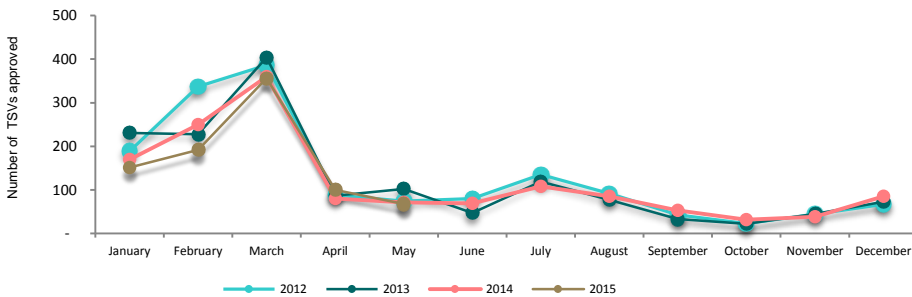
Takeaways:

- Despite a positive May, YTD this market has experienced a 10% decline in TSVs.
- The university and secondary school sectors have seen good growth up 5% and 33%.
- Reports from the market indicate that there has been a steady increase in students that have a higher risk profile for INZ. This is leading to higher declines and lower student numbers approved. ENZ is working with INZ to better understand this issue.

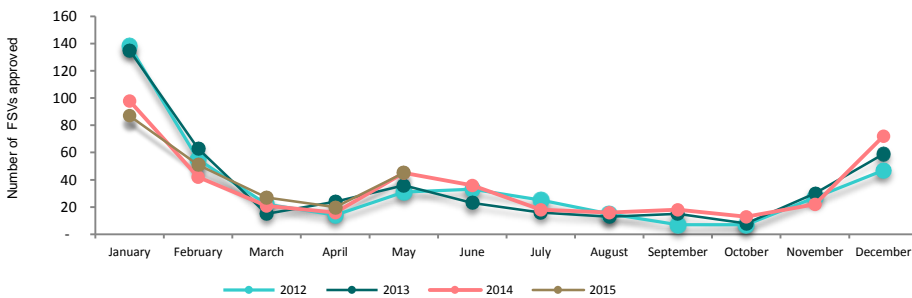
Malaysia:

May RSV		May FSV		May TSV	
↓	-3	↓	-12%	→	0
			0%	↓	-3
					-4%

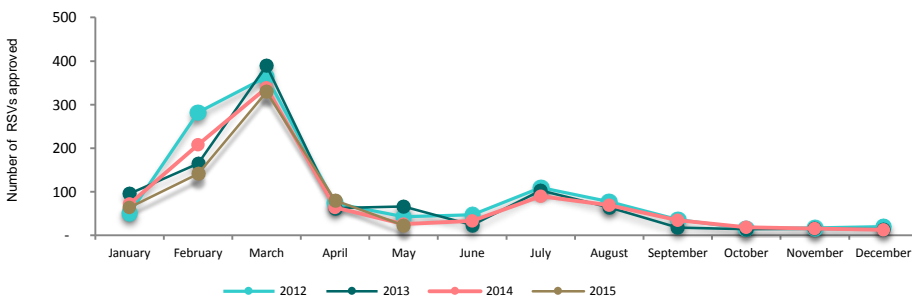
Malaysia: Total student visas (TSV) 2012 - 2015



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



Malaysia: Renewed student visas (RSV) 2012 - 2015



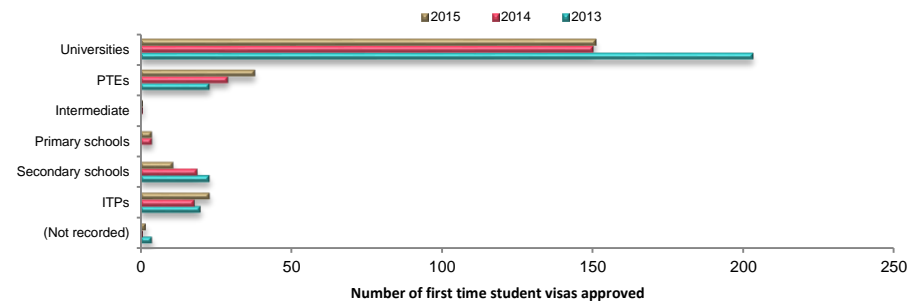
Takeaways:

- This market has tracked flat throughout 2014 and has experienced a relatively significant decline YTD down 7% TSVs.
- The PTE and ITP sectors have experienced growth up 31% and 28%.

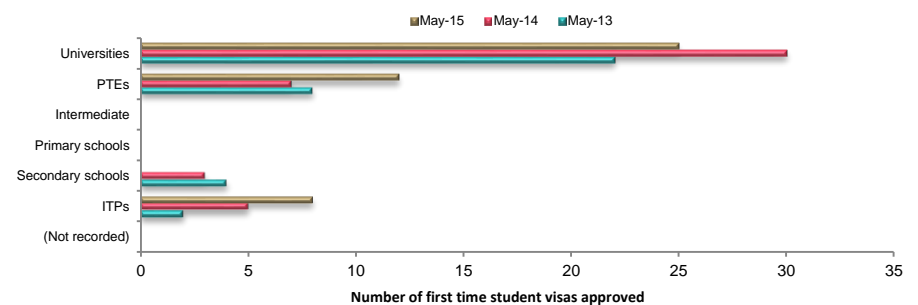
YTD (January to May)

YTD RSV		YTD FSV		YTD TSV	
↓	-72	↑	8	↓	-64
	-10%		4%		-7%

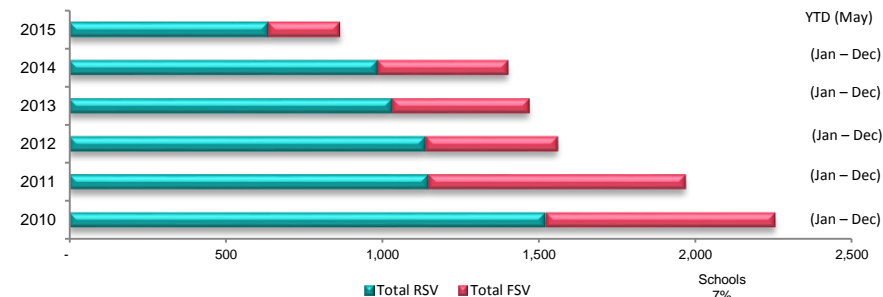
Malaysia: First time student visas issued by sector, YTD



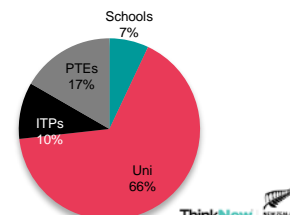
Malaysia: First time student visas issued by sector, May









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



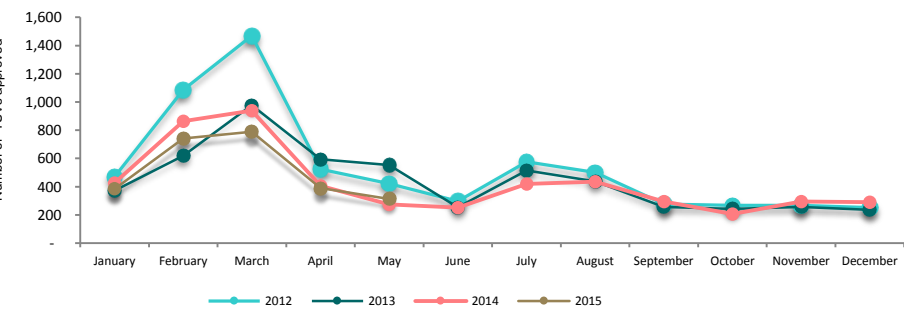
YTD 2015 sector
breakdown of FSVs



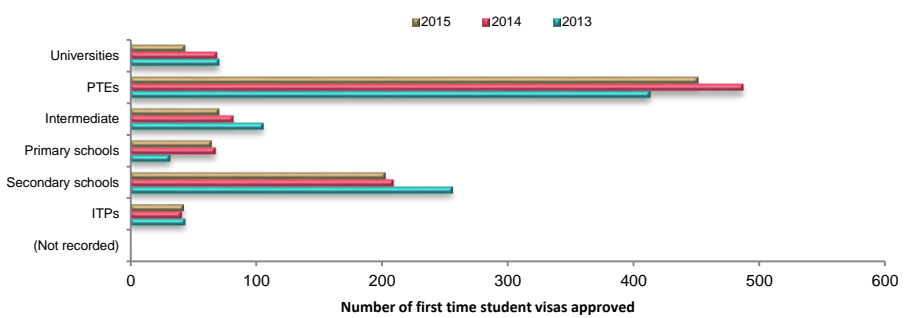
May RSV		May FSV		May TSV	
	29	26%		10	6%
	39	14%			

YTD RSV		YTD FSV		YTD TSV	
	-213	-11%		-79	-8%
	-292	-10%			

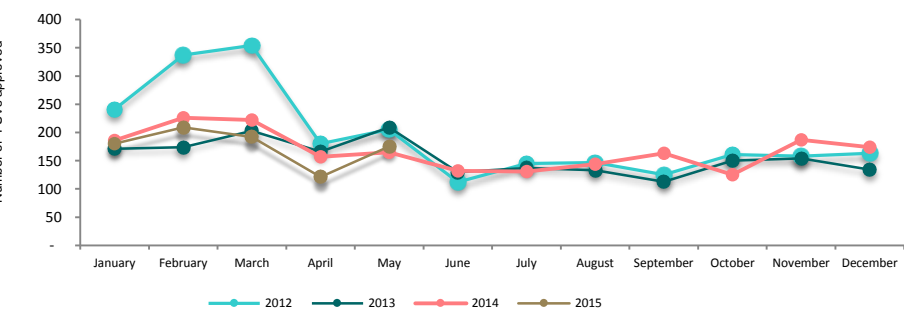
Korea: Total student visas (TSV) 2012 - 2015



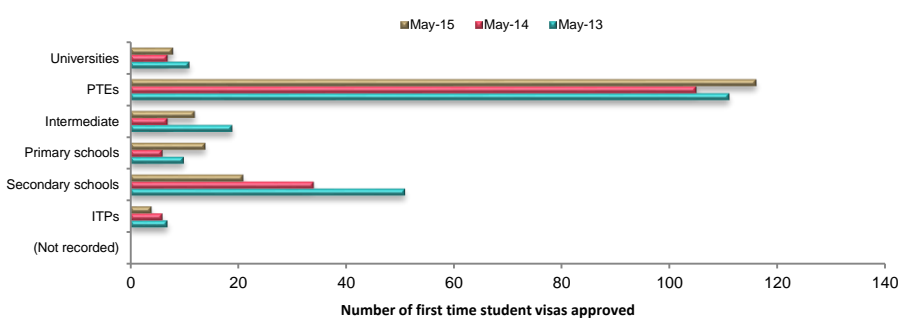
Korea: First time student visas issued by sector, YTD



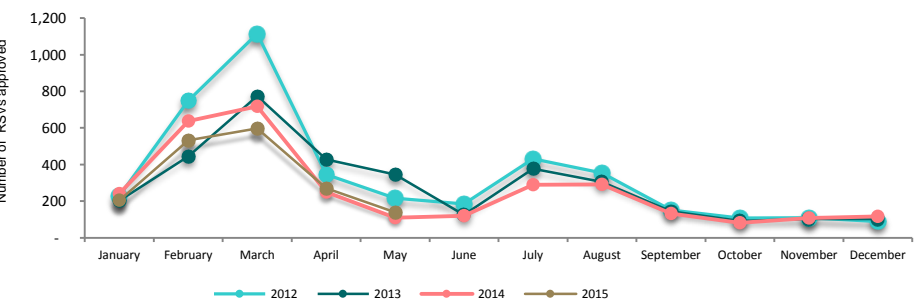
Korea: First time student visas (FSV) 2012 - 2015



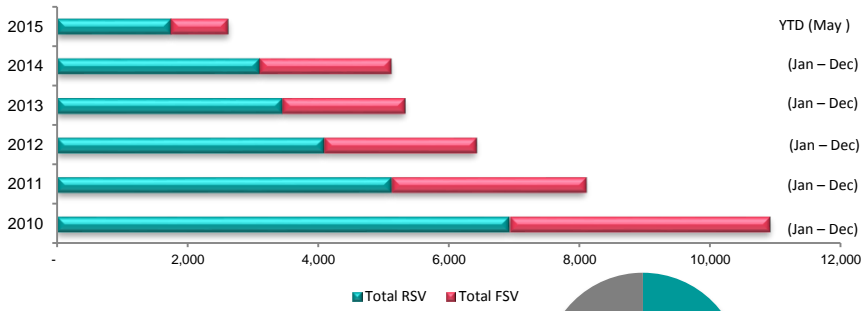
Korea: First time student visas issued by sector, May



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



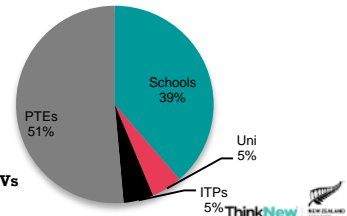
Korea: Cumulative total for RSV vs. FSV 2010 - 2015






Takeaways:

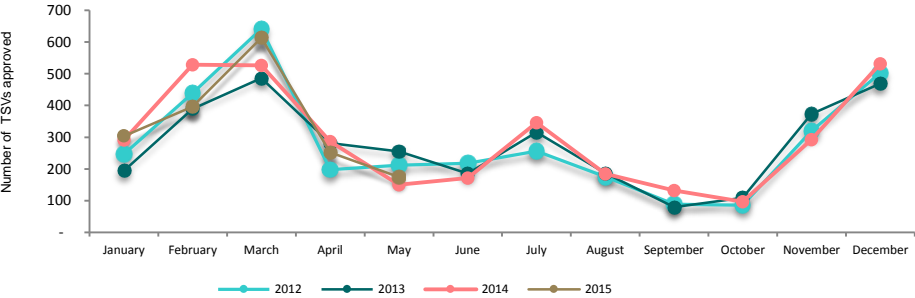
- This market continues to see declines, down 10% (292 TSVs) YTD.
- A strong May has slowed the YTD decline, up 14% (39) TSV.

YTD 2015 sector breakdown of FSVs

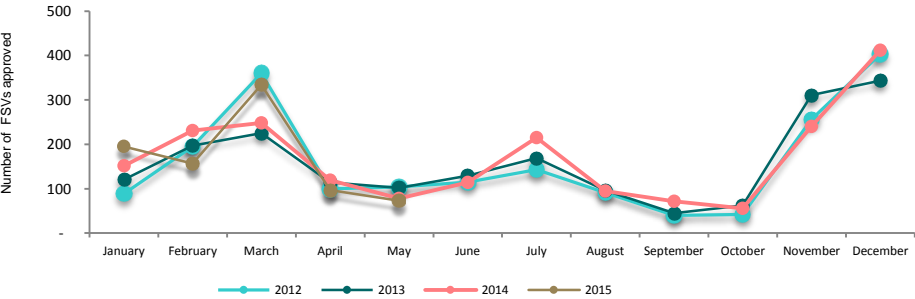


May RSV		May FSV		May TSV	
	29	40%		-5	-6%
	24	16%			

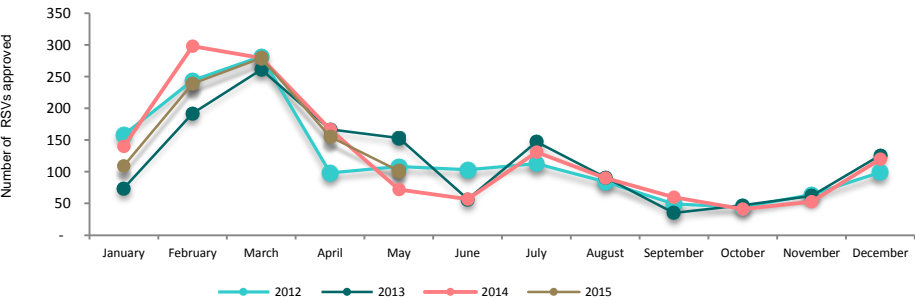
Japan: Total student visas (TSV) 2012 - 2015



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






Japan: Renewed student visas (RSV) 2012 - 2015

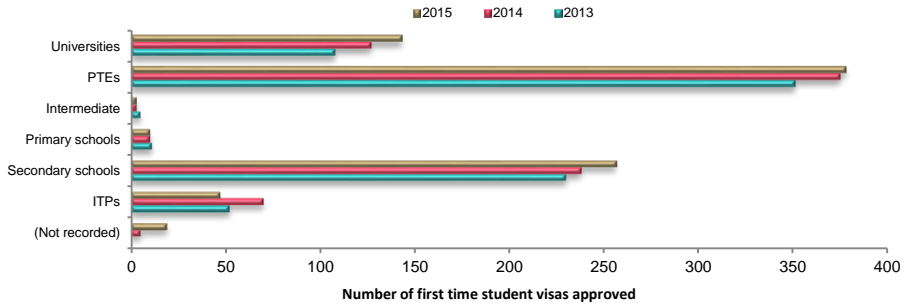


Takeaways:

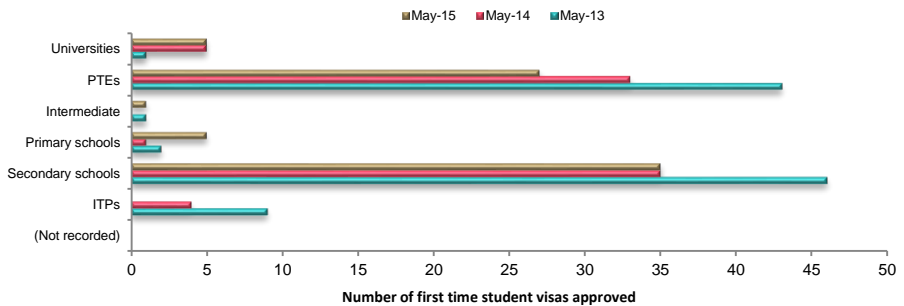
- Japan has been tracking relatively flat YTD, down 3% (-45).
- May saw mixed results with a 6% (-5) decline in FSVs, which was offset by a 40% (29) increase in RSVs.

YTD RSV		YTD FSV		YTD TSV	
	-73	-8%		28	3%
				-45	-3%

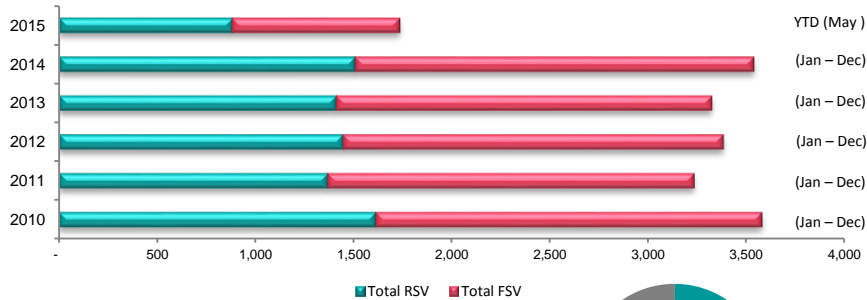
Japan: First time student visas issued by sector, YTD



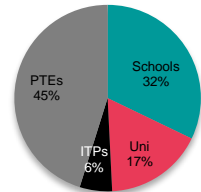
Japan: First time student visas issued by sector, May



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



YTD 2015 sector breakdown of FSVs



United States of America:

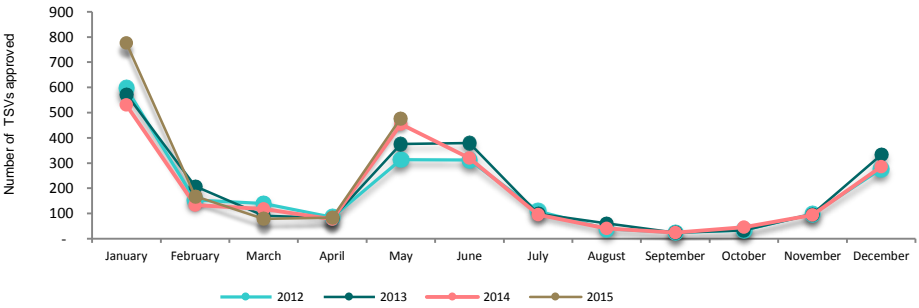


YTD (January to May)

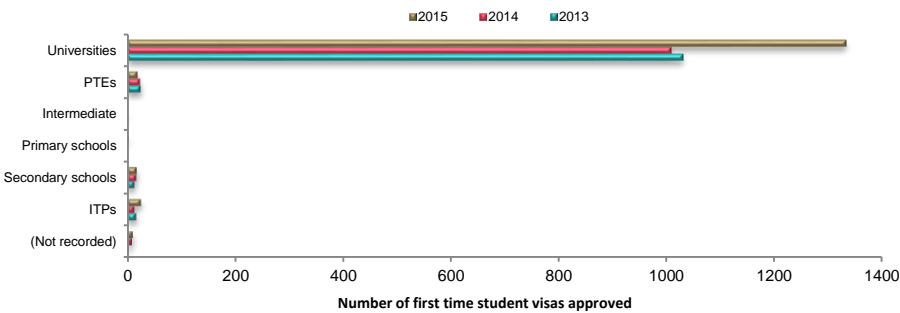
May RSV		May FSV		May TSV	
↓	-7	↑	32	↑	25
	-33%		7%		6%

YTD RSV		YTD FSV		YTD TSV	
↓	-61	↑	334	↑	273
	-26%		31%		21%

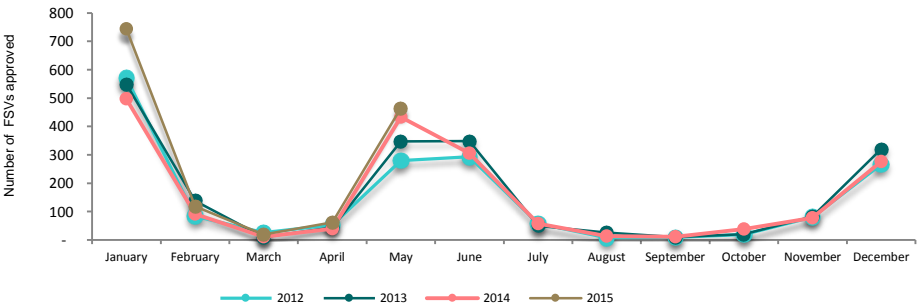
United States of America: Total student visas (TSV) 2012 - 2015



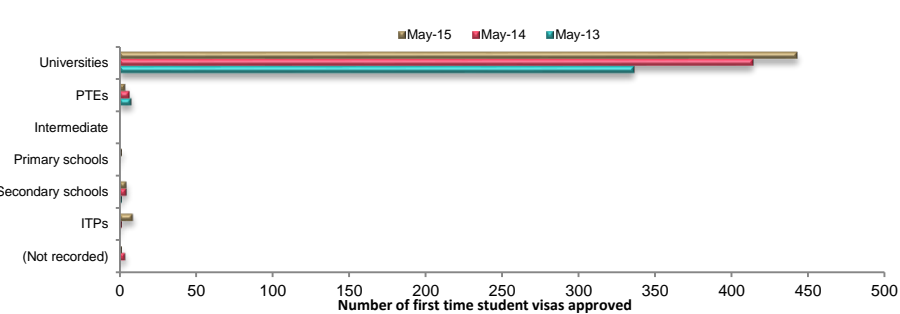
United States of America: First time student visas issued by sector, YTD



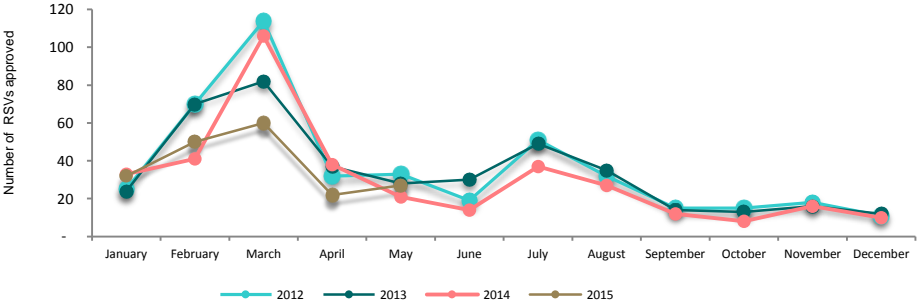
United States of America: First time student visas (FSV) 2012 - 2015



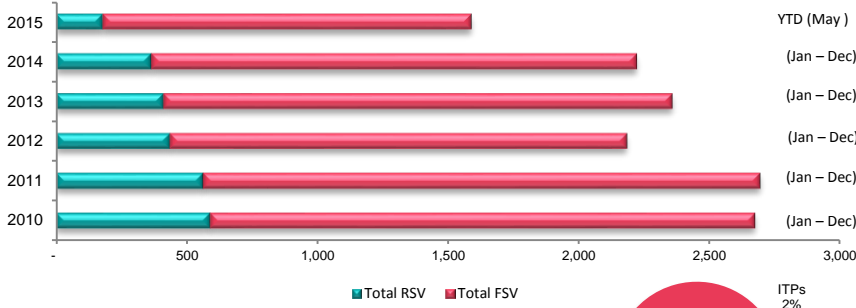
United States of America: First time student visas issued by sector, May



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



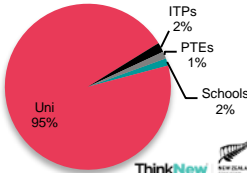
United States of America: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market has experienced a significant increase YTD up 21% (273).
- 95% of the approved FSVs for this market are university students.

YTD 2015 sector breakdown of FSVs

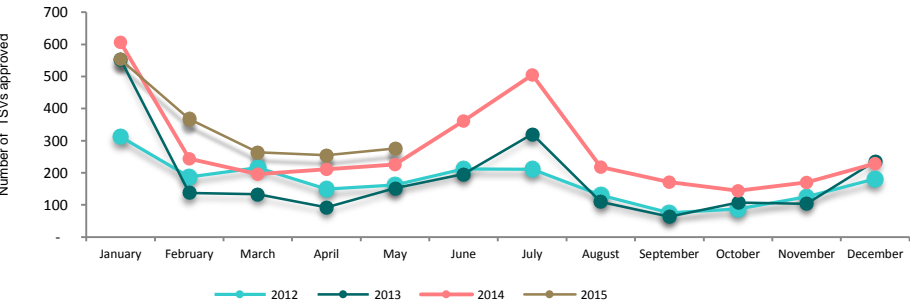


Latin America:

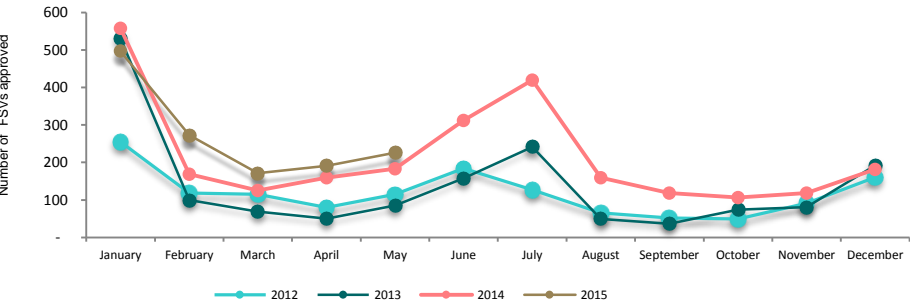
YTD (January to May)

May RSV			May FSV		May TSV			
↑	7	16%	↑	43	23%	↑	50	22%

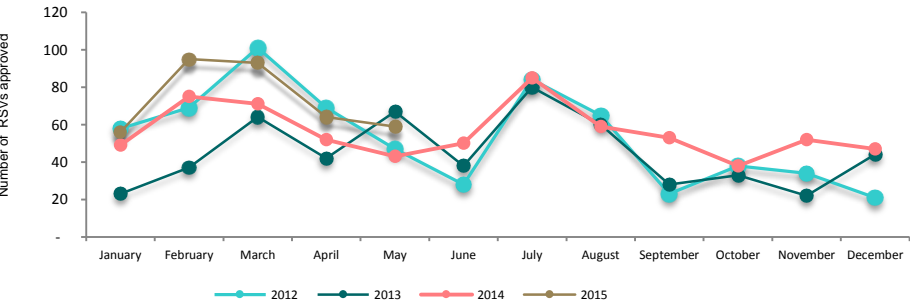
Latin America: Total student visas (TSV) 2012 - 2015



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

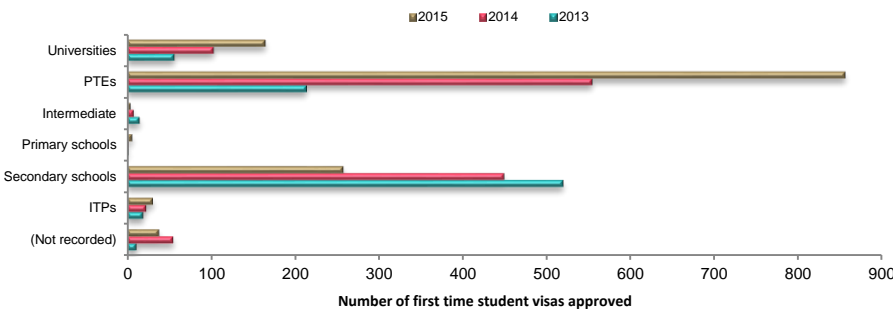


Latin America: Renewed student visas (RSV) 2012 - 2015

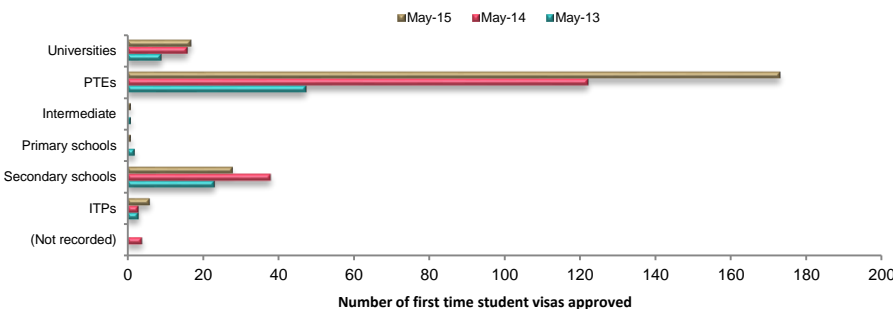


YTD RSV			YTD FSV		YTD TSV			
📈	68	23%	📈	164	14%	📈	232	16%

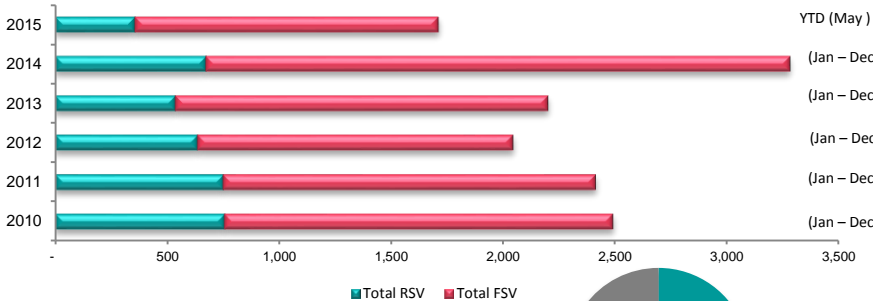
Latin America: First time student visas issued by sector, YTD



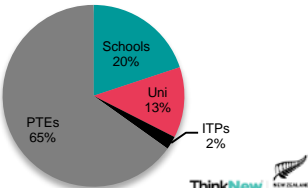
Latin America: First time student visas issued by sector, May



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



YTD 2015 sector
breakdown of FSVs



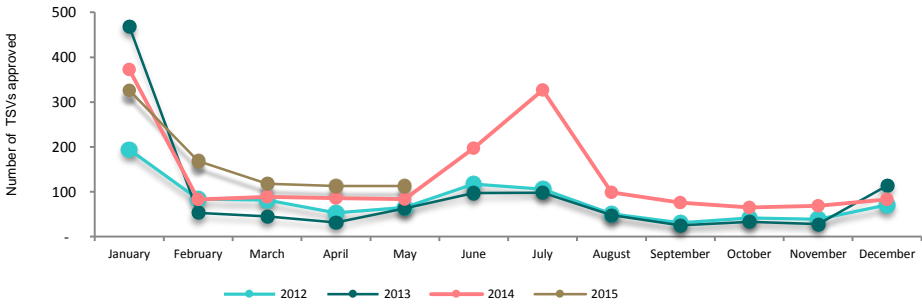
Takeaways:

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

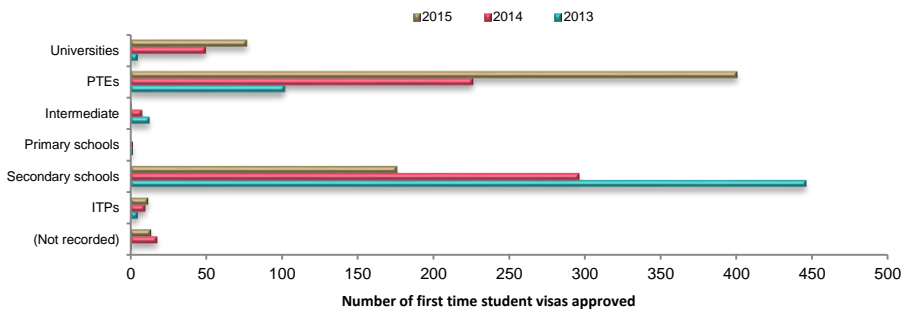
May RSV			May FSV			May TSV		
↑	2	11%	↑	27	42%	↑	29	35%

YTD RSV			YTD FSV			YTD TSV		
↑	54	51%	↑	70	11%	↑	124	17%

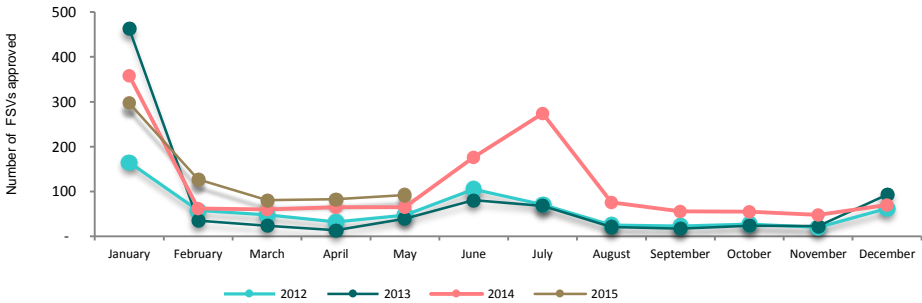
Brazil: Total student visas (TSV) 2012 - 2015



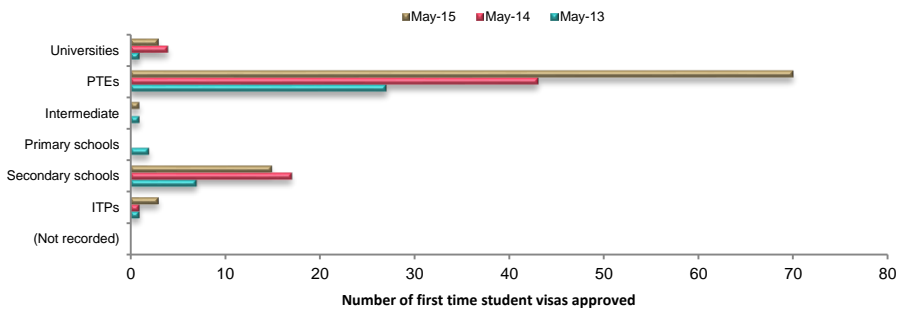
Brazil: First time student visas issued by sector, YTD



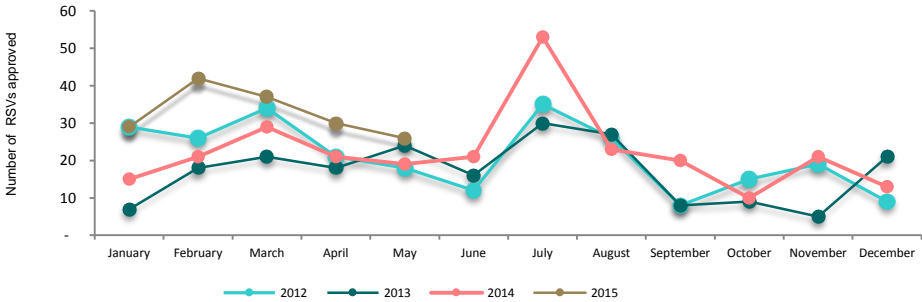
Brazil: First time student visas (FSV) 2012 - 2015



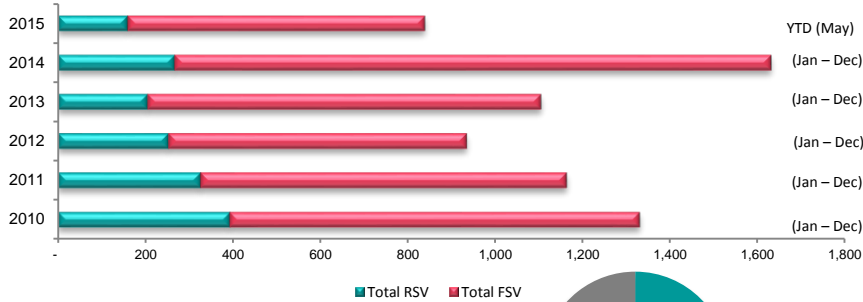
Brazil: First time student visas issued by sector, May



Brazil: Renewed student visas (RSV) 2012 - 2015



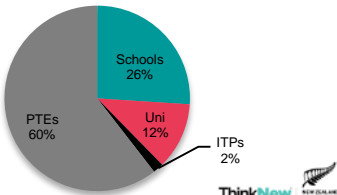
Brazil: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- Despite a decline in January, the YTD position for this market is relatively strong, up 17% (124 TSVs).
- The PTE and university sectors have experienced strong growth up 77% and 54%.

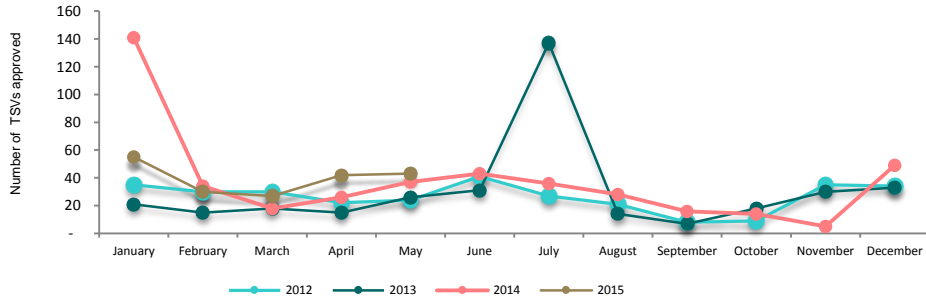
**YTD 2015 sector
breakdown of FSVs**



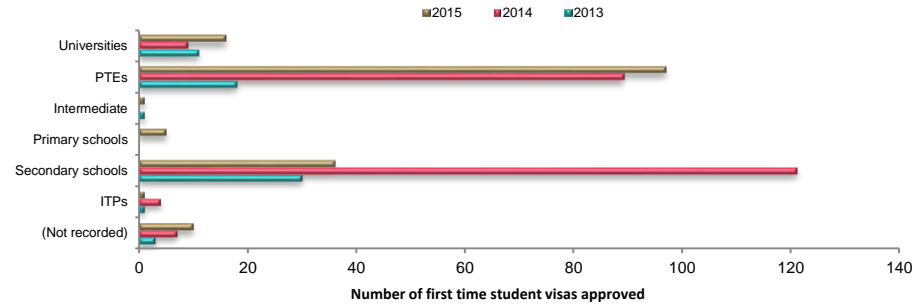
May RSV			May FSV			May TSV		
↑	1	50%	↑	5	14%	↑	6	16%

YTD RSV			YTD FSV			YTD TSV		
↑	5	19%	↓	-64	-28%	↓	-59	-23%

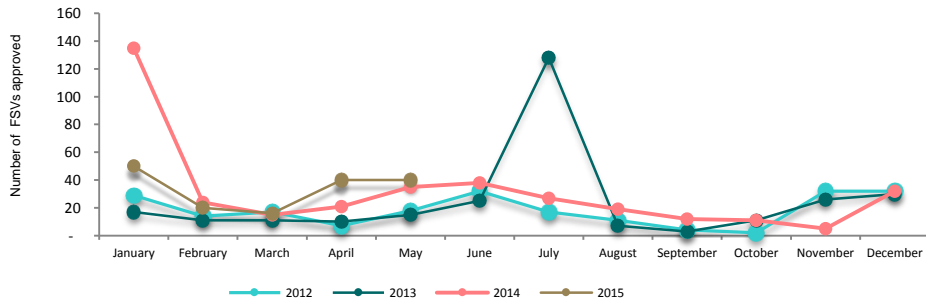
Chile: Total student visas (TSV) 2012 - 2015



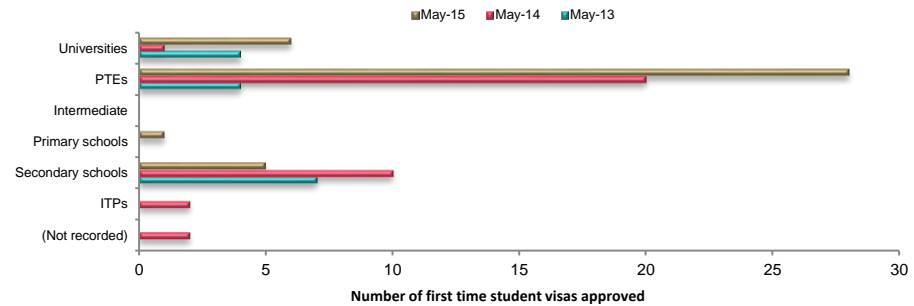
Chile: First time student visas issued by sector, YTD



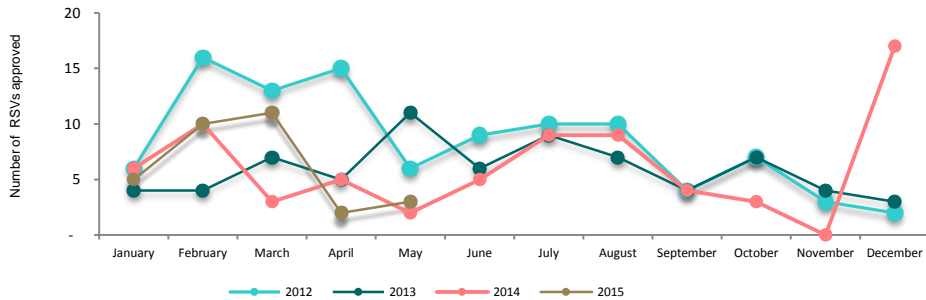
Chile: First time student visas (FSV) 2012 - 2015



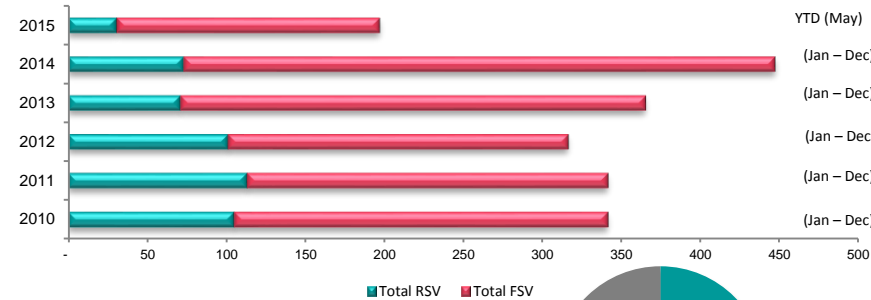
Chile: First time student visas issued by sector, May



Chile: Renewed student visas (RSV) 2012 - 2015



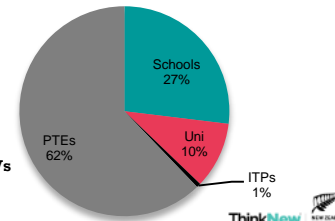
Chile: Cumulative total for RSV vs. FSV 2010 - 2015






Takeaways:

- This market has experienced a decline in visa approvals YTD.
- April and May 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.

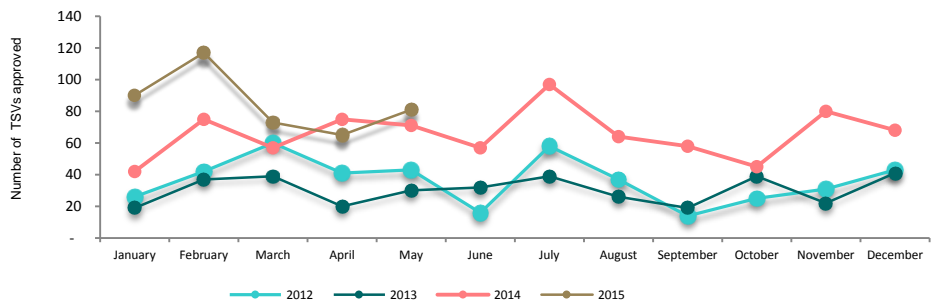
YTD 2015 sector breakdown of FSVs



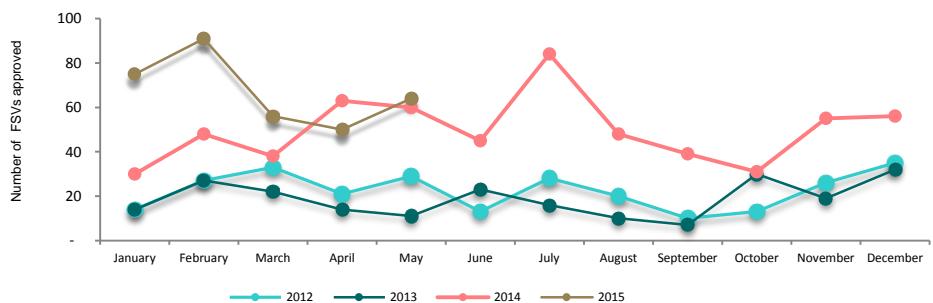
May RSV		May FSV		May TSV				
	6	55%		4	7%		10	14%

YTD RSV			YTD FSV		YTD TSV			
📈	9	11%	📈	97	41%	📈	106	33%

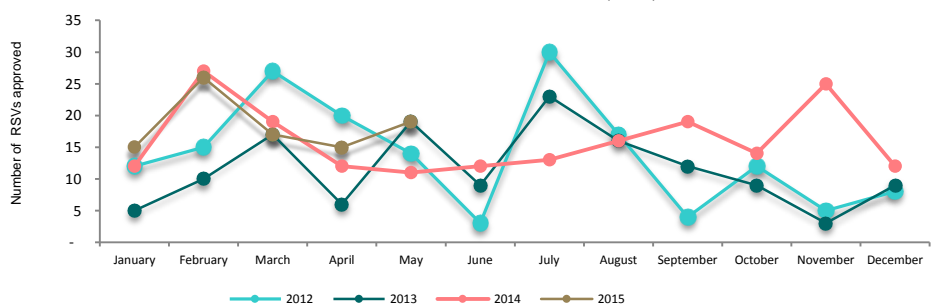
Colombia: Total student visas (TSV) 2012 - 2015



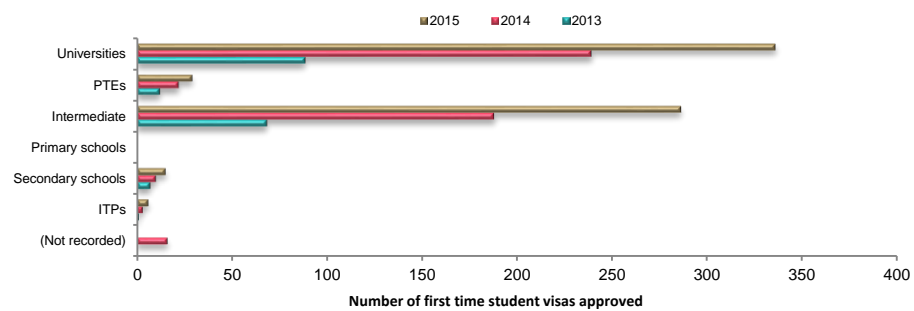
Colombia: First time student visas (FSV) 2012 - 2015



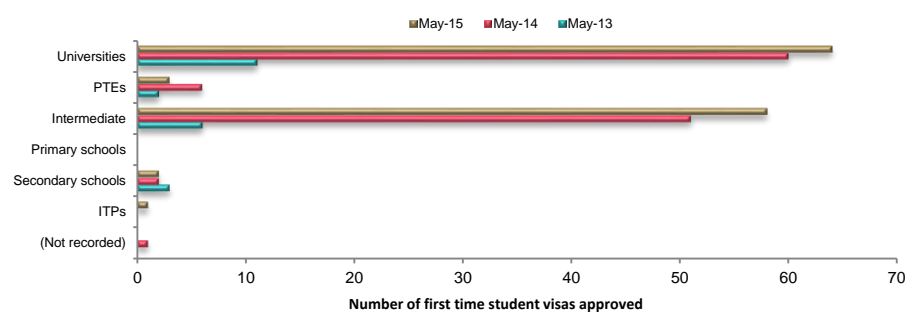
Colombia: Renewed student visas (RSV) 2012 - 2015



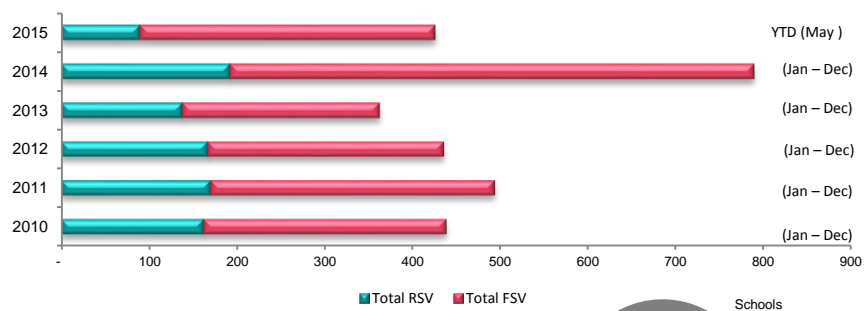
Colombia: First time student visas issued by sector, YTD



Colombia: First time student visas issued by sector, May



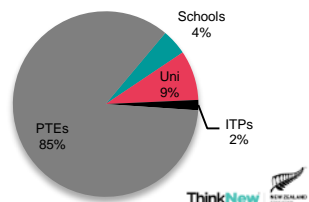
Colombia: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market has experienced significant growth up 33% (106 TSVs) YTD.
- The university, PTE and schools sectors have experienced growth up 41%, 32%, and 50%.

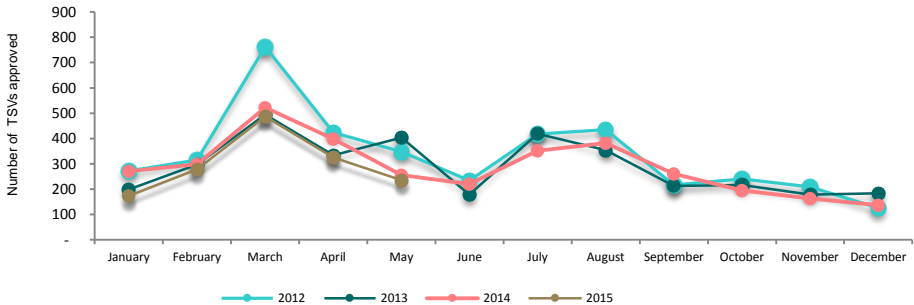
YTD 2015 sector breakdown of FSVs



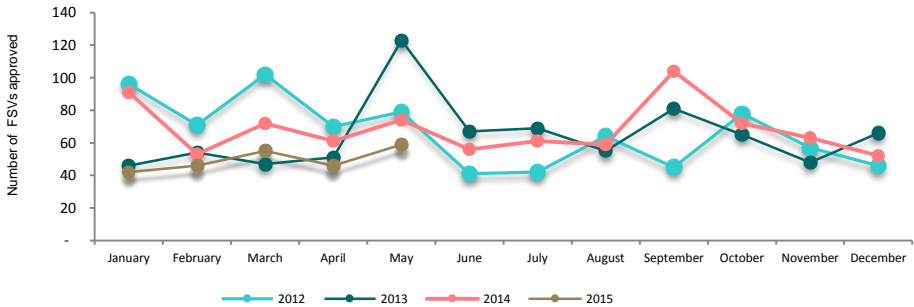
Middle East:

May RSV		May FSV		May TSV	
↓	-5	↓	-3%	↓	-15
			-20%		-20
					-8%

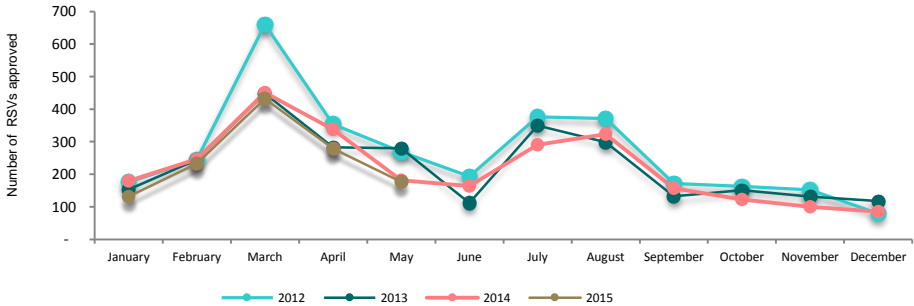
Middle East: Total student visas (TSV) 2012 - 2015



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



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

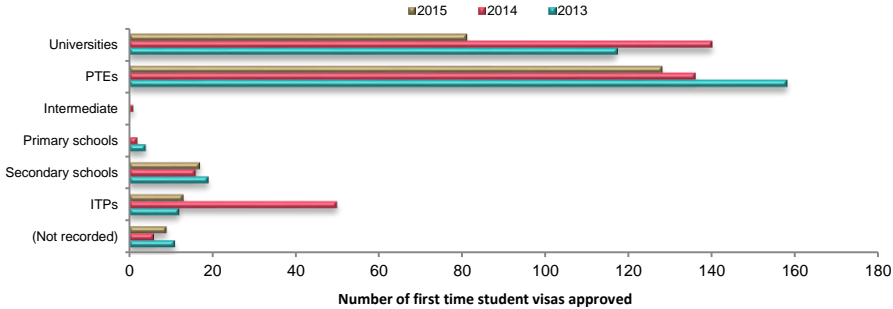


- Takeaways:
- This market continues to experience negative results.

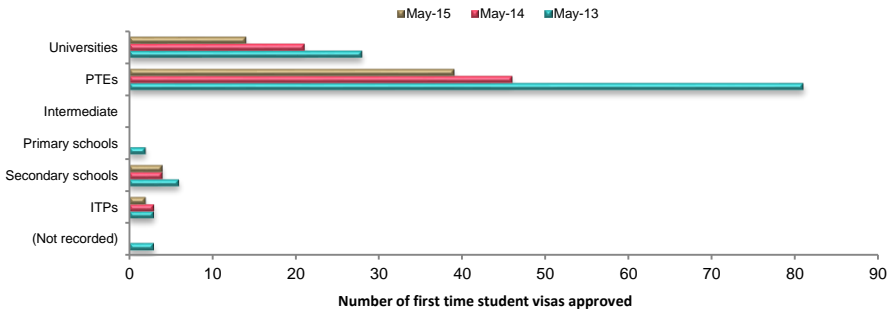
YTD (January to May)

YTD RSV		YTD FSV		YTD TSV	
↓	-145	↓	-103	↓	-248
			-29%		-14%

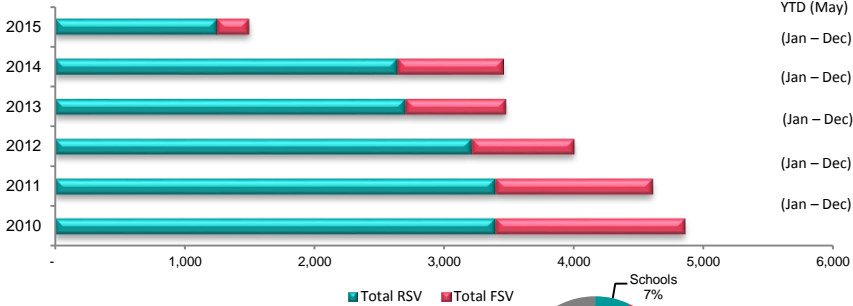
Middle East: First time student visas issued by sector, YTD



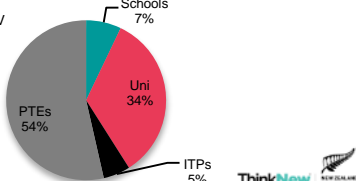
Middle East: First time student visas issued by sector, May



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



YTD 2015 sector breakdown of FSVs



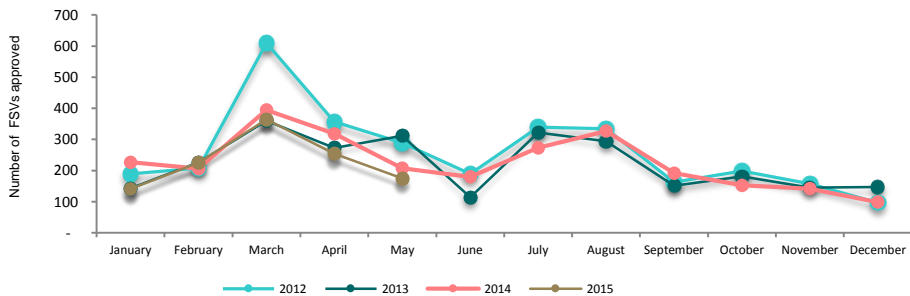
Saudi Arabia:

YTD (January to May)

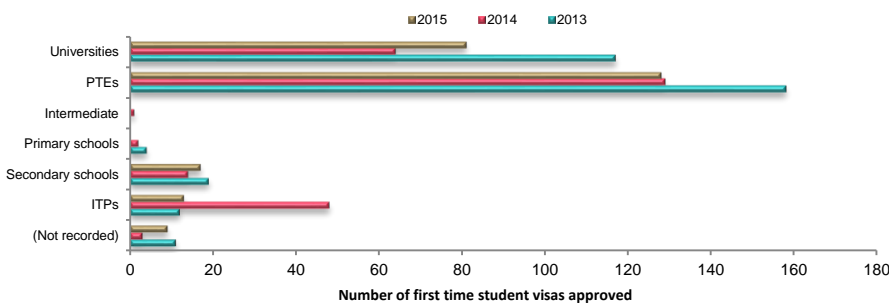
May RSV		May FSV		May TSV	
↓	-10	↓	-7%	↓	-23
	-7%		-36%		-33
					-16%

YTD RSV		YTD FSV		YTD TSV	
↓	-109	↓	-10%	↓	-86
	-10%		-33%		-195
					-14%

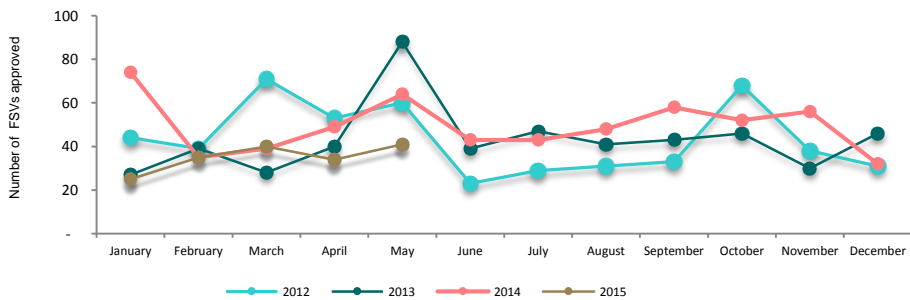
Saudi Arabia: Total student visas approved 2012 - 2015 (TSV)



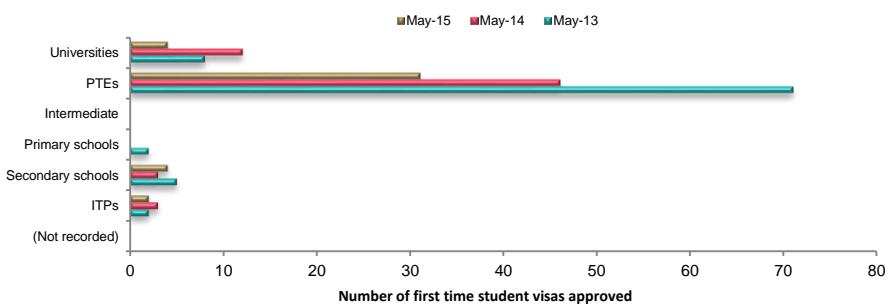
Saudi Arabia: First time student visas issued by sector, YTD



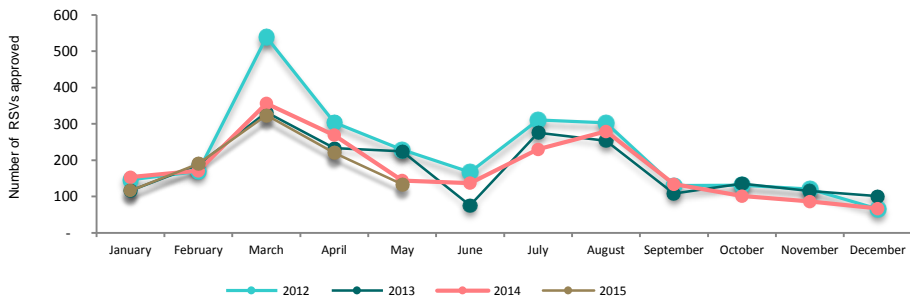
Saudi Arabia: Total first time student visas approved (FSV) 2012 - 2015



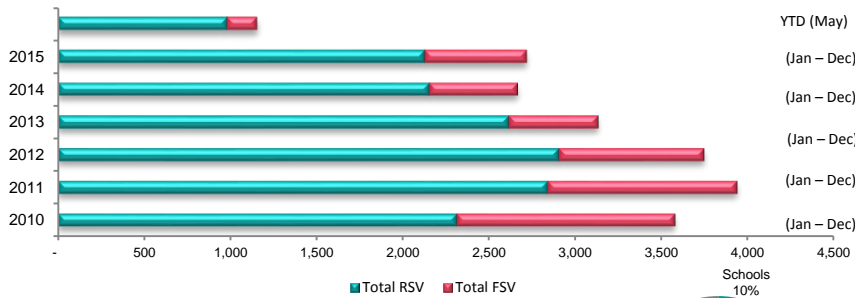
Saudi Arabia: First time student visas issued by sector, May



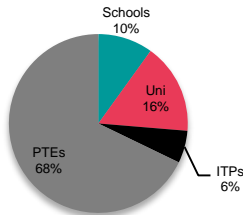
Saudi Arabia: Total Renewed student visas (RSV) 2012 - 2015



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









YTD 2015 sector breakdown of FSVs



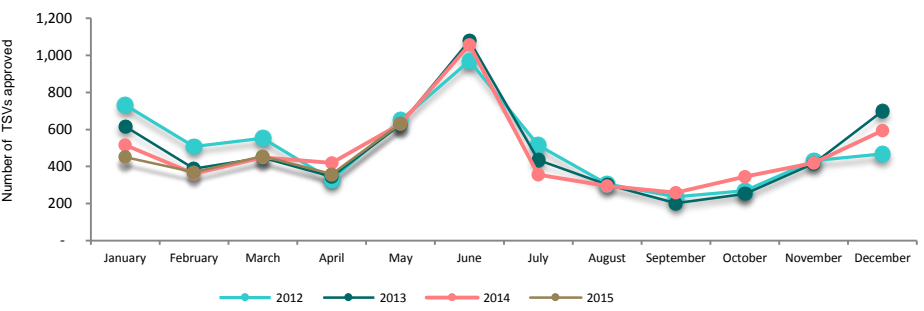
Takeaways:

- This market continues to experience negative results.
- The YTD 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.

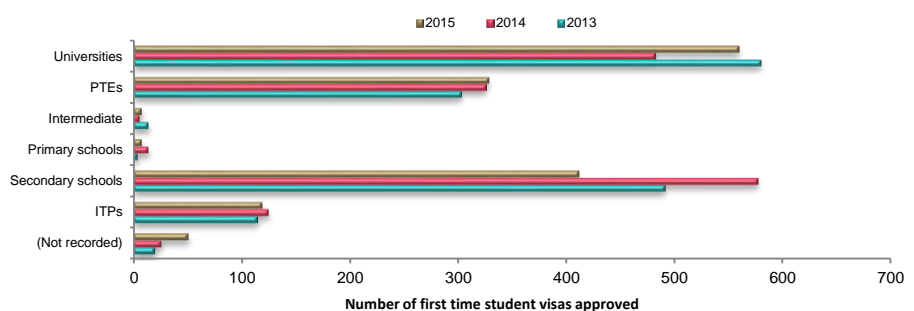
May RSV		May FSV		May TSV	
	8	9%		-7	-1%
	1	0%			

YTD RSV		YTD FSV		YTD TSV	
	-38	-5%		-72	-5%
				-110	-5%

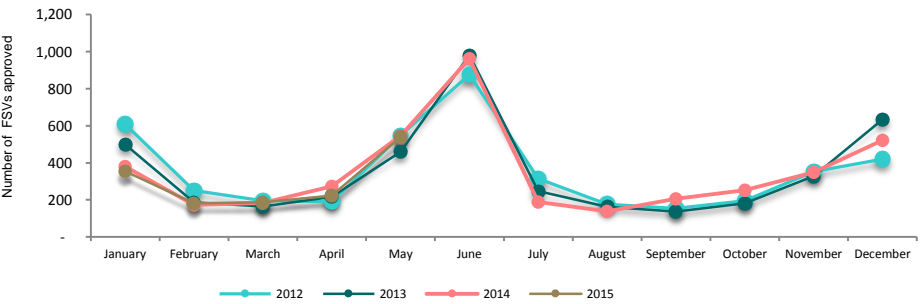
Europe: Total student visas (TSV) 2012 - 2015



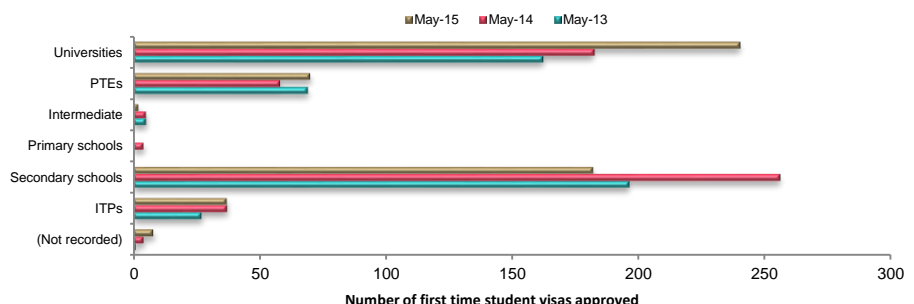
Europe: First time student visas issued by sector, YTD



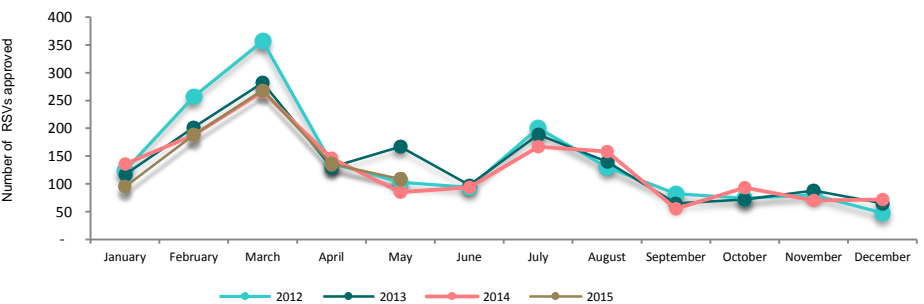
Europe: First time student visas (FSV) 2012 - 2015



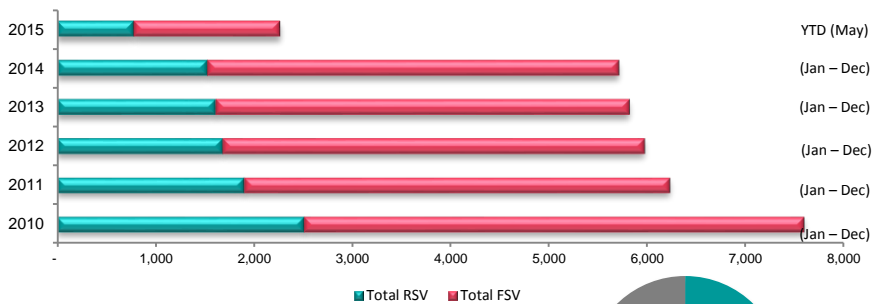
Europe: First time student visas issued by sector, May



Europe: Renewed student visas (RSV) 2012 - 2015



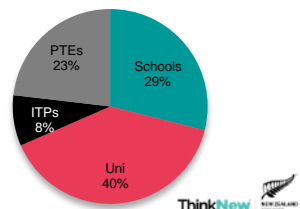
Europe: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- TSVs continue to decline, down 5%.
- The university sector experienced strong growth YTD up 16%.

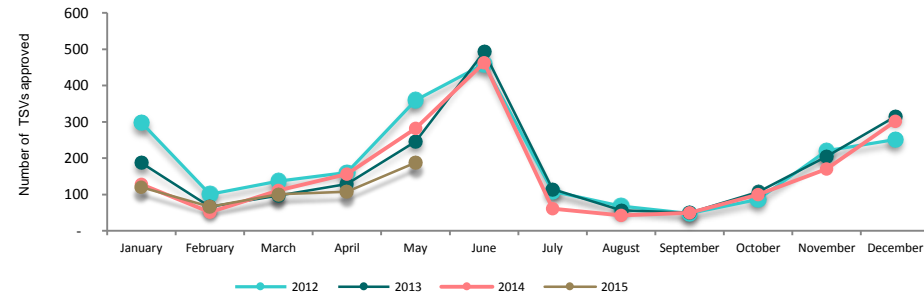
YTD 2015 sector breakdown of FSVs



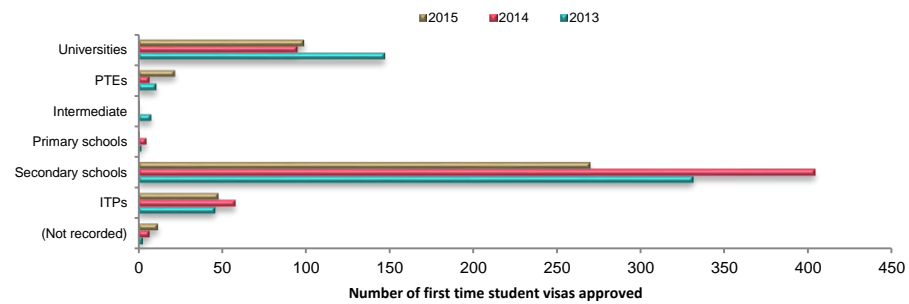
May RSV			May FSV		May TSV	
↑	2	9%	↓	-96	↓	-94
				-37%		-33%

YTD RSV			YTD FSV		YTD TSV		
↓	-21	-14%	↓	-124	↓	-145	-20%

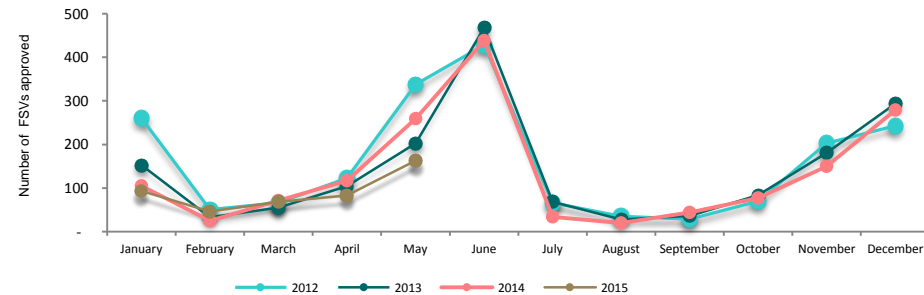
Germany: Total student visas (TSV) 2012 - 2015



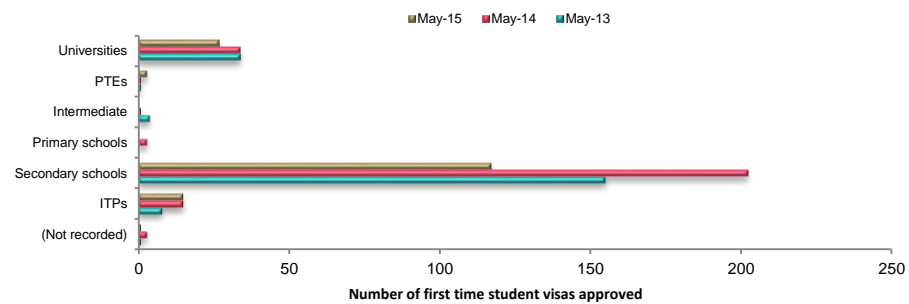
Germany: First time student visas issued by sector, YTD



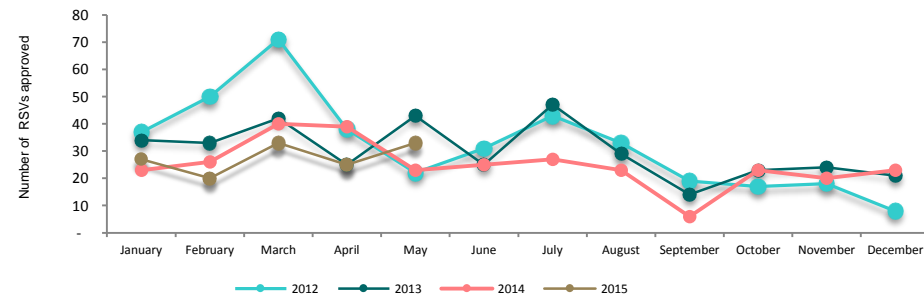
Germany: First time student visas (FSV) 2012 - 2015



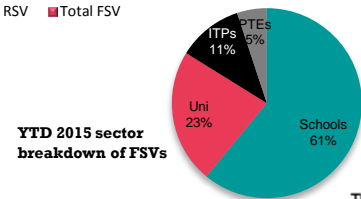
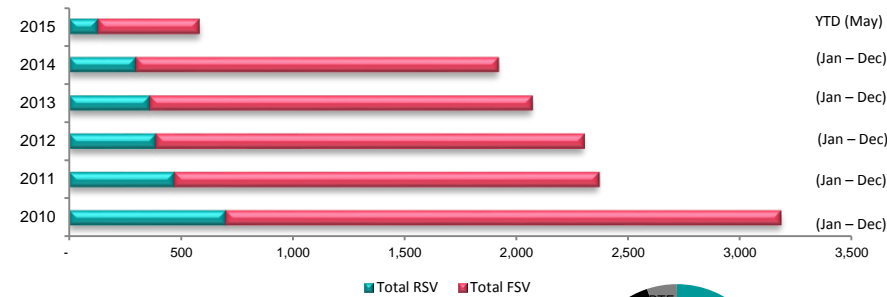
Germany: First time student visas issued by sector, May



Germany: Renewed student visas (RSV) 2012 - 2015



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



Takeaways:

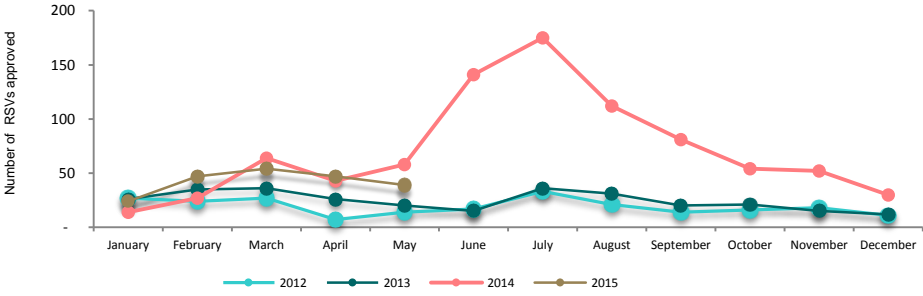
- This market continues to decline down 20% (-145).



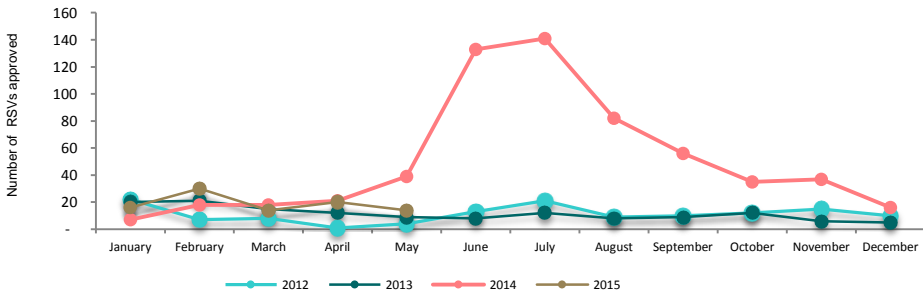
YTD (January to May)

May RSV			May FSV		May TSV	
↑	6	32%	↓	-25 -64%	↓	-19 -33%

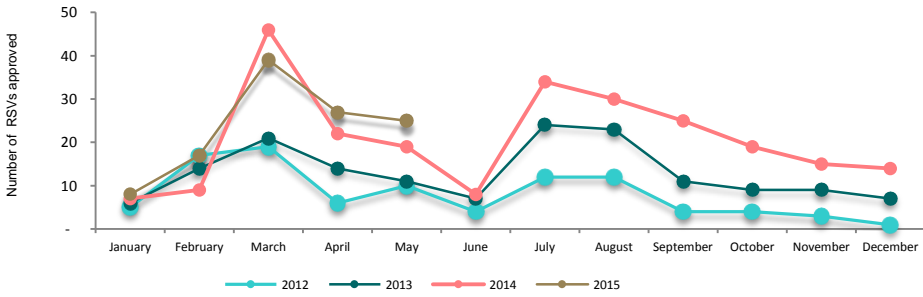
Overall: Total student visas (TSV) 2012 - 2015



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

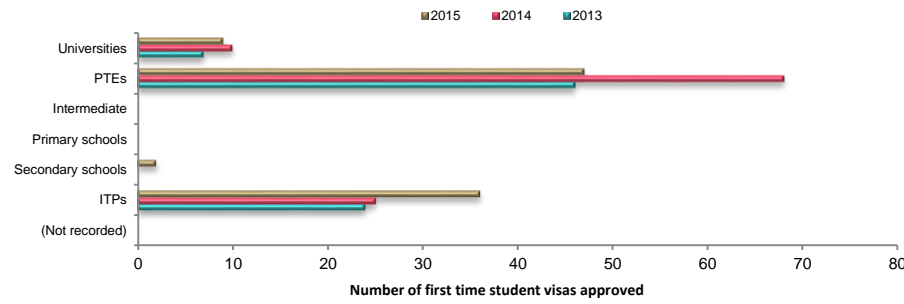


Nepal: Renewed student visas (RSV) 2012 - 2015

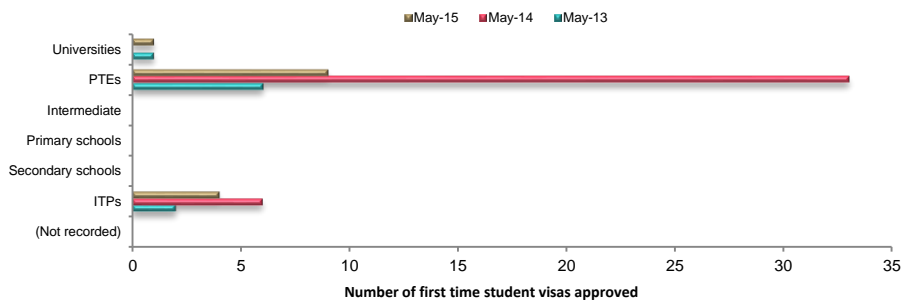


YTD RSV			YTD FSV		YTD TSV			
↑	14	14%	↓	-9	-9%	↑	5	2%

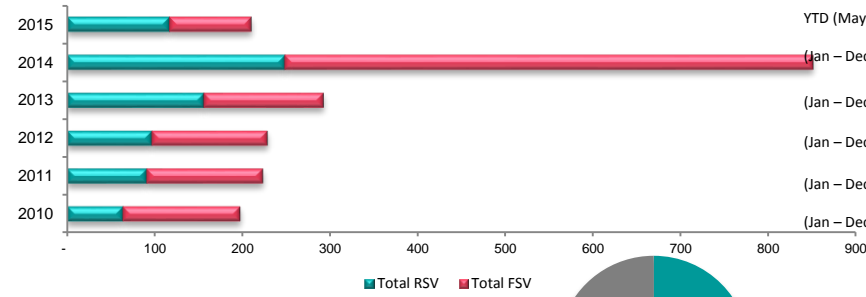
Nepal: First time student visas issued by sector, YTD



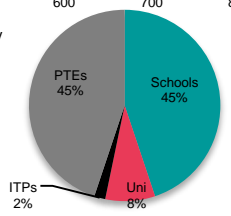
Nepal: First time student visas issued by sector, May



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



YTD 2015 sector breakdown of FSVs

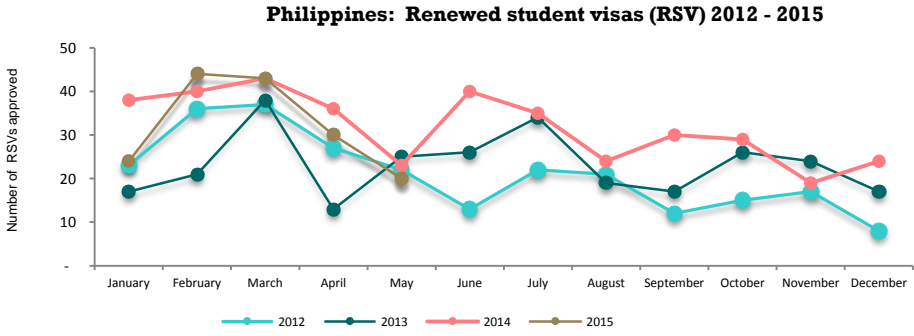
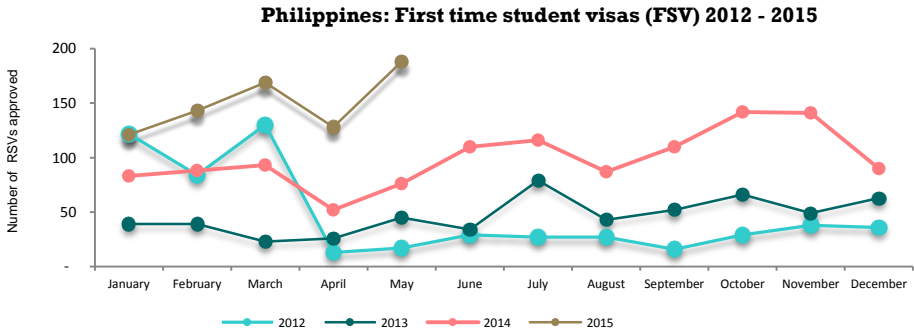
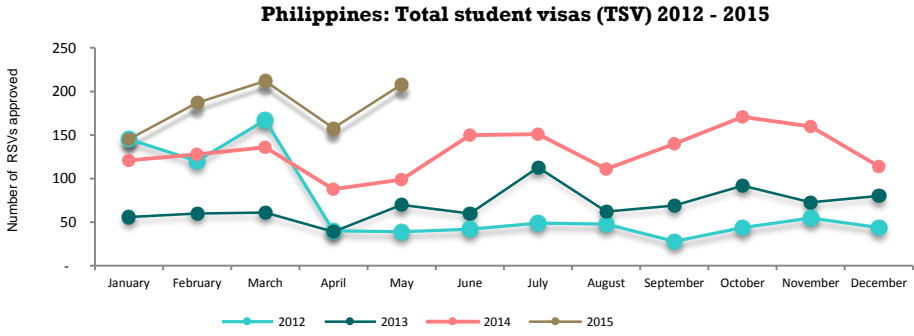


Takeaways:

- This market grew significantly in 2014, however appears to be slowing.

Philippines

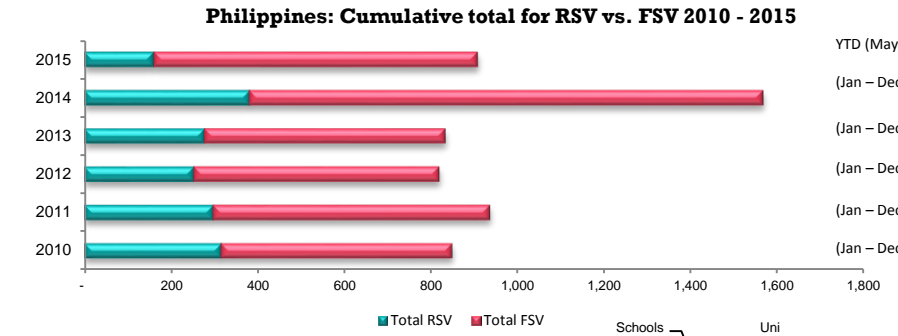
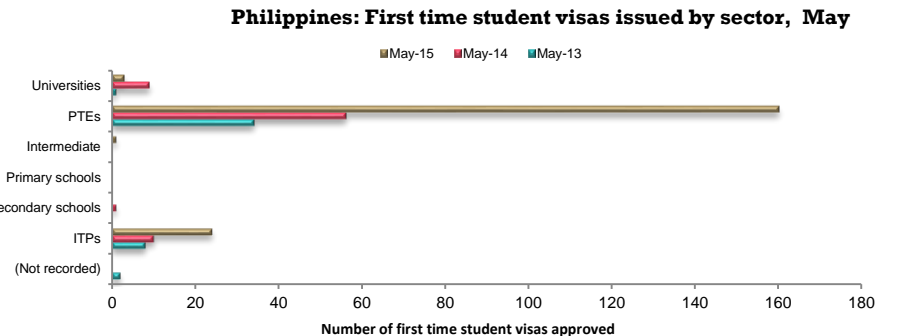
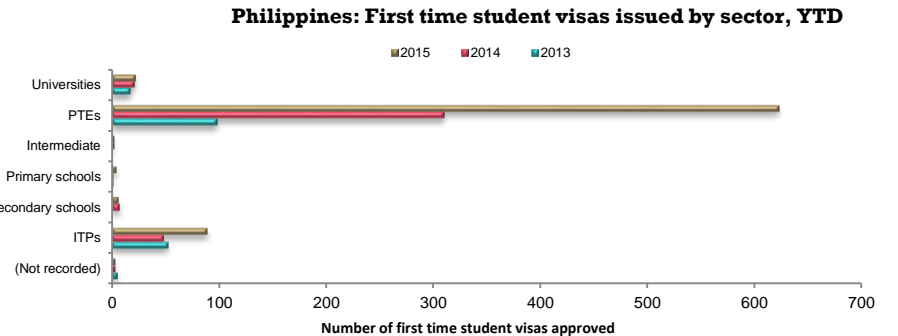
May RSV		May FSV		May TSV	
↓ -3	-13%	↑ 112	147%	↑ 109	110%



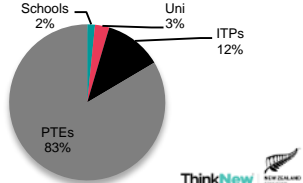
- Takeaways:**
- This market grew significantly in 2014 and has continued to see strong growth in 2015.
 - The PTE and ITP sectors have experienced the strongest growth up 101% and 85%.

YTD (January to May)

YTD RSV		YTD FSV		YTD TSV	
↓ -19	-11%	↑ 357	91%	↑ 338	59%





YTD 2015 sector breakdown of FSVs

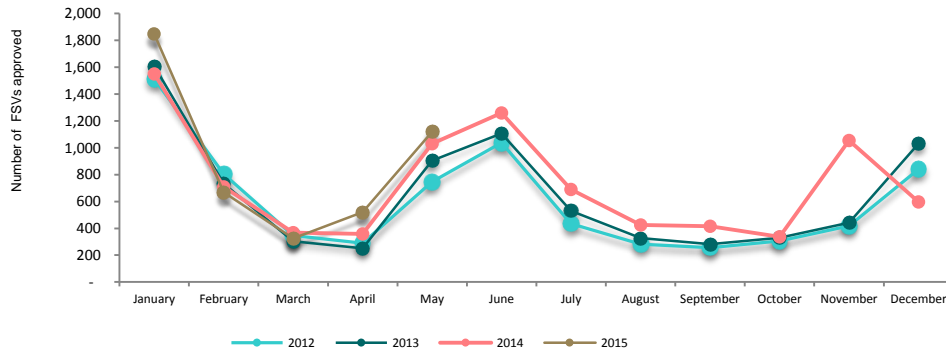


Overall: Sector overview

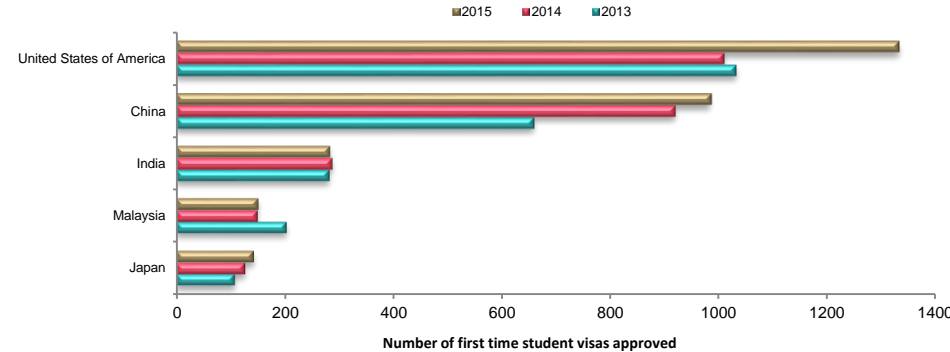
University:

May FSV		YTD FSV	
	88	9%	 460
			11%

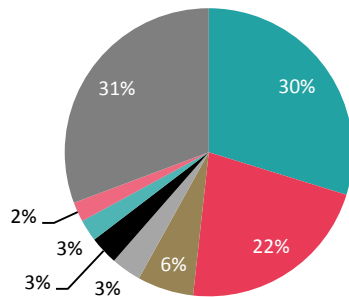
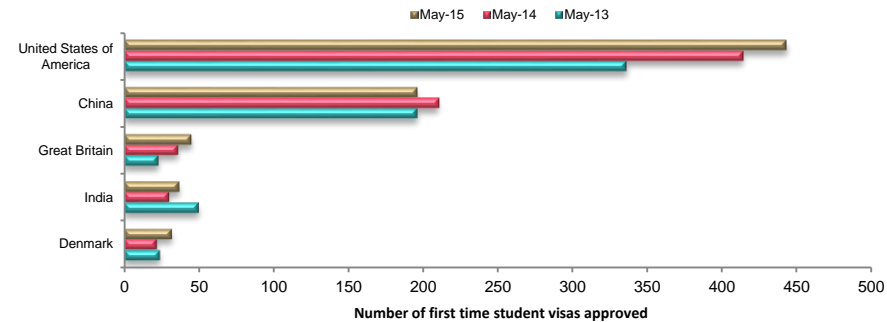
University: Total first time student visas (FSV) 2012 - 2015



University: First time student visas issued by country, YTD

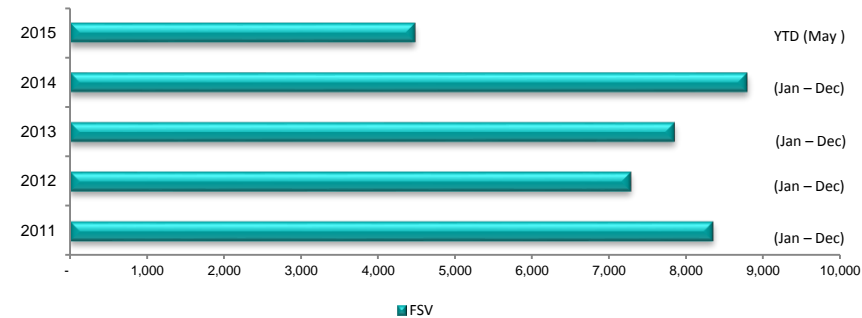


University: First time student visas issued, May



United States of America China India Malaysia Japan Great Britain Germany Other

University: Cumulative total FSV 2011 - 2015



Takeaways:

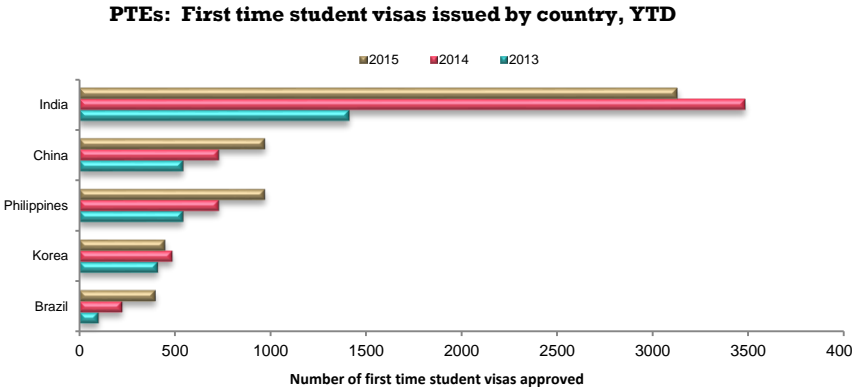
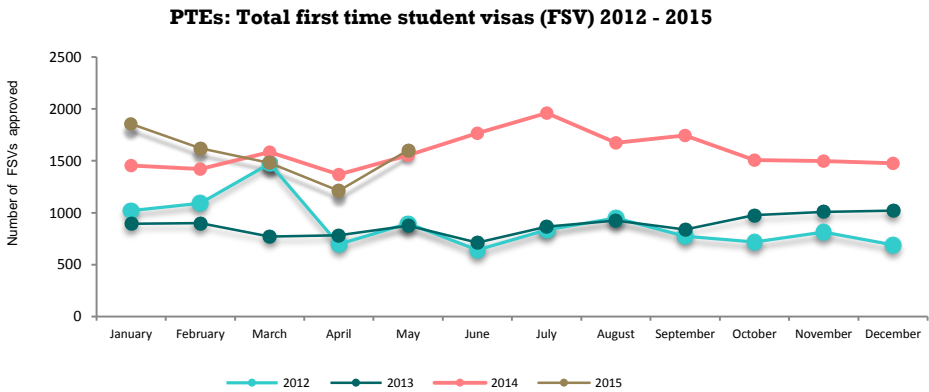
- The university sector has started the 2015 year in a strong position, up 11% (460).
- This growth was driven by the USA, up 32% (324) YTD.
- The USA accounts for 30% of all university FSV approvals YTD.

Private Training Establishments (PTE):

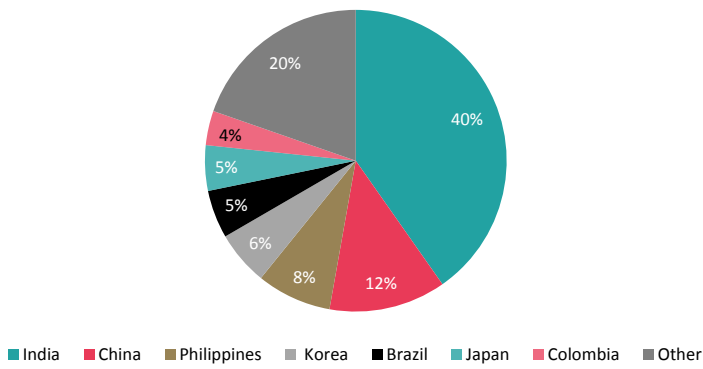


YTD (January to May)

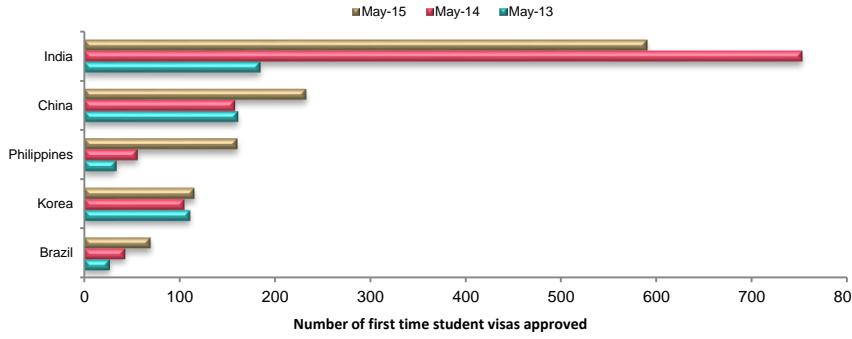
May FSV		YTD FSV	
↑ 48	3%	↑ 381	5%



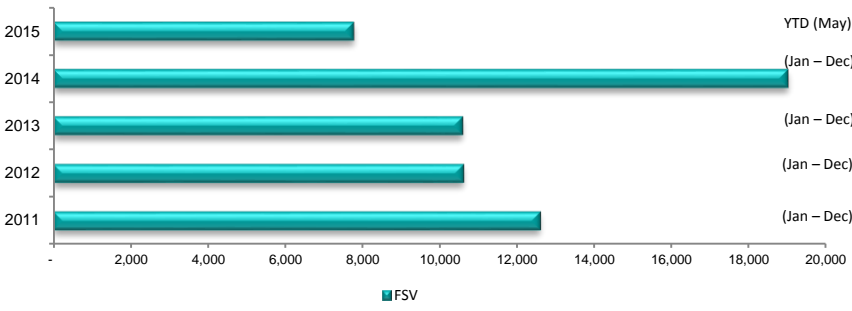
YTD 2015 country breakdown of FSVs



PTEs: First time student visas issued, May



PTEs: Cumulative total FSV 2011 - 2015



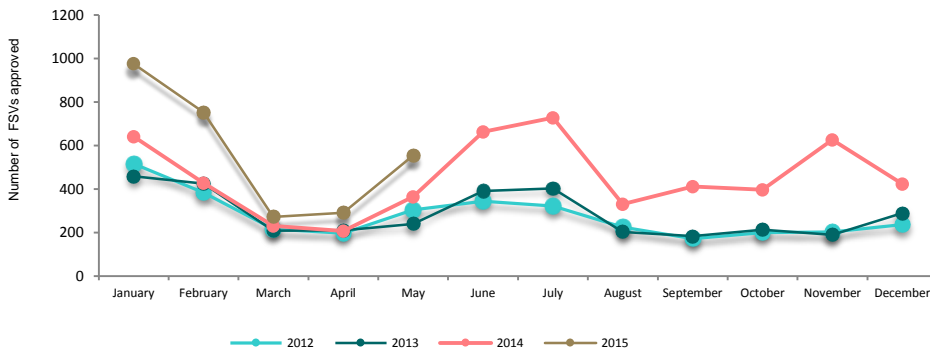
- Takeaways:
- Following a strong finish to 2014, 2015 is also tracking positively up 5% (381).
 - Declines from the Indian market has slowed overall growth.

Institutes of Technology and Polytechnics (ITPs):

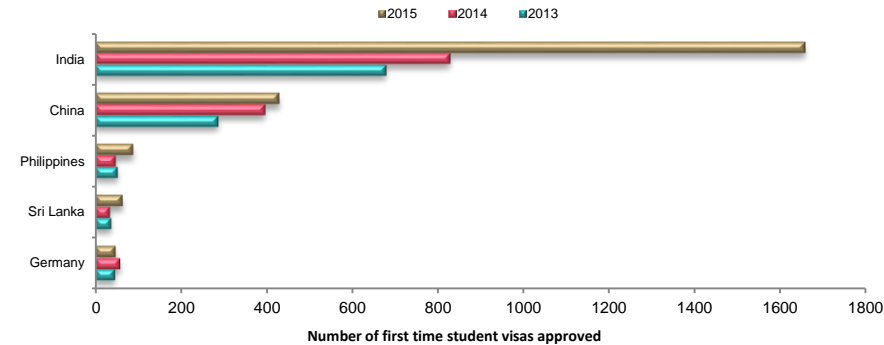
YTD (January to May)

May FSV		YTD FSV	
↑ 189	52%	↑ 973	52%

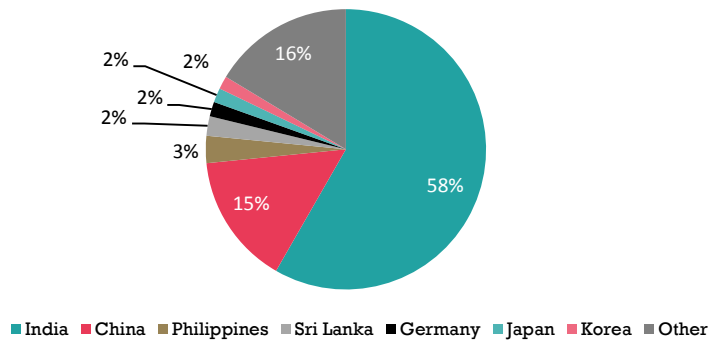
ITPs: Total first time student visas (FSV) 2012 - 2015



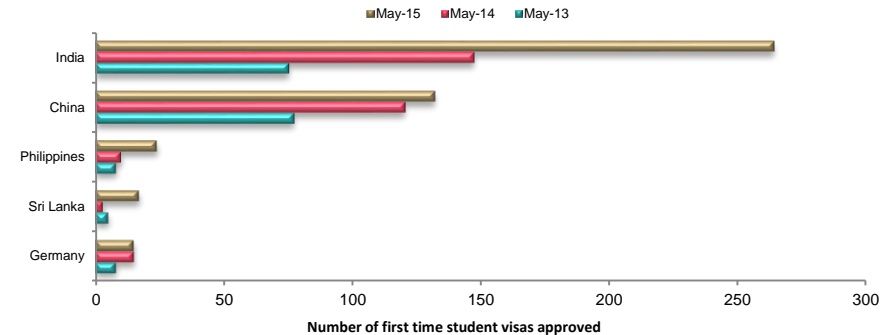
ITPs: First time student visas issued by country, YTD



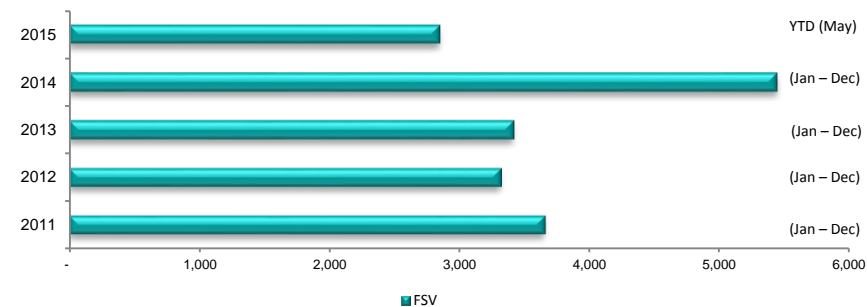
YTD 2015 country breakdown of FSVs



ITPs: First time student visas issued, May



ITPs: Cumulative total FSV 2011 - 2015



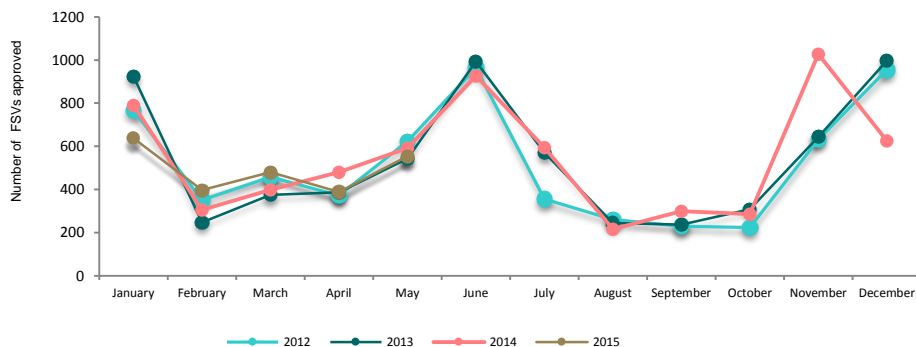
Takeaways:

- After experiencing a strong 2014, the ITP sector has continued to grow, up 52% (973) YTD.
- This growth was driven by the Indian market which represents 58% of all FSVs approved YTD.

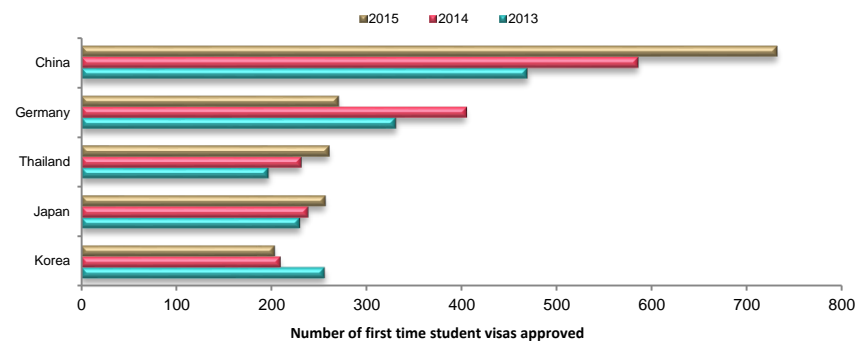
Secondary schools:

May FSV		YTD FSV	
	-36		-107
	-6%		-4%

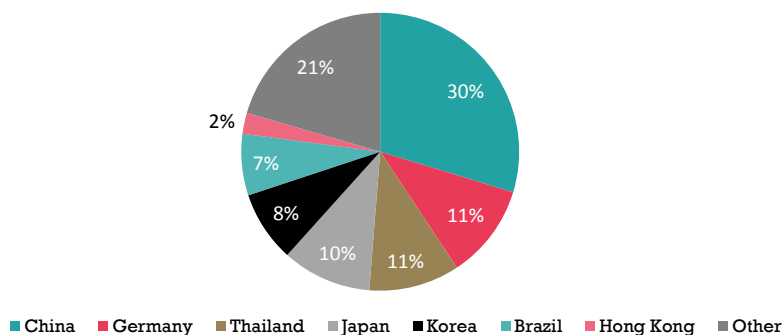
Secondary schools: Total first time student visas (FSV) 2012 - 2015



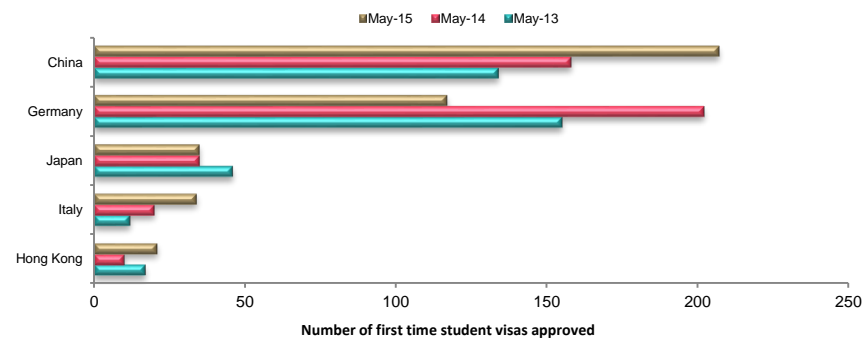
Secondary schools: First time student visas issued by country, YTD



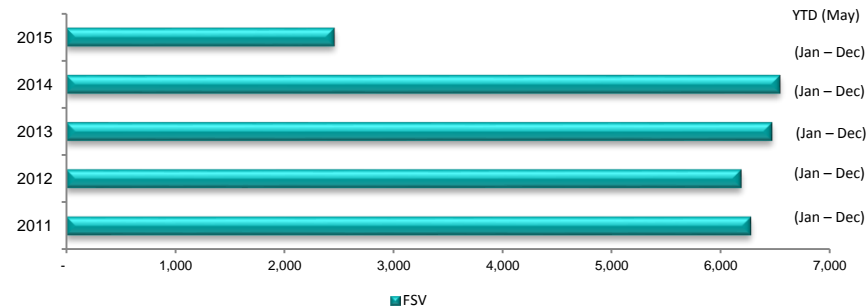
YTD 2015 country breakdown of FSVs



Secondary schools: First time student visas issued, May





Secondary schools: Cumulative total FSV 2011 - 2015

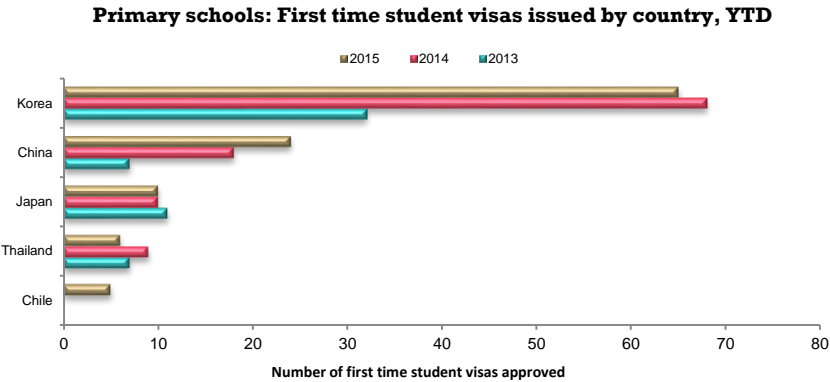
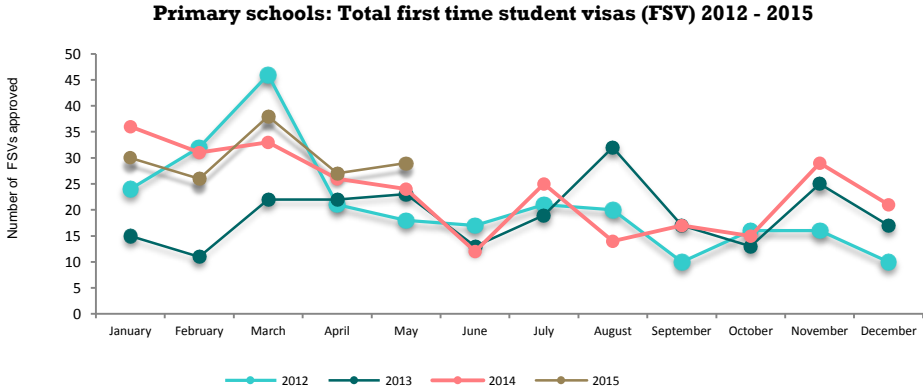


Takeaways:

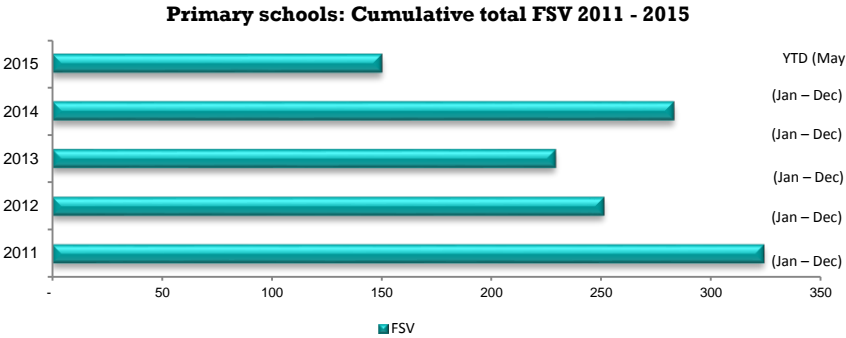
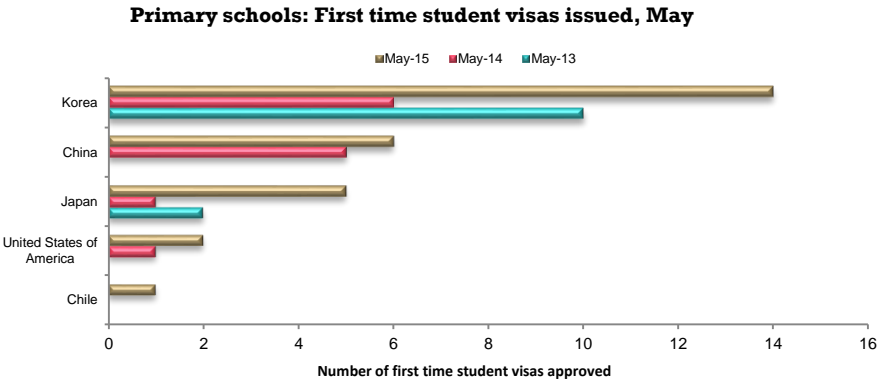
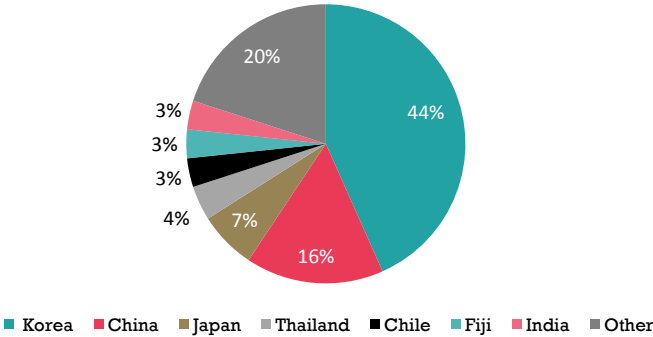
- This sector has started the 2015 year in a negative position, down 4% (-107), which was driven by a loss in scholarship students from Latin America in January.

Primary schools:

YTD (January to May)			
May FSV		YTD FSV	
 5	21%	 0	0%



YTD 2015 country breakdown of FSVs



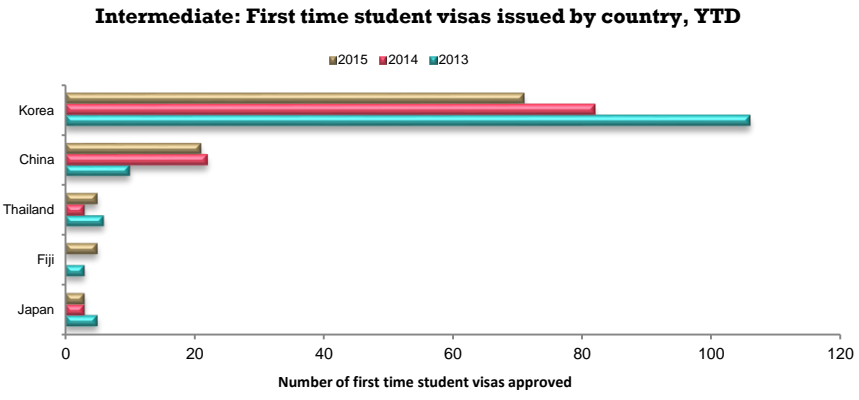
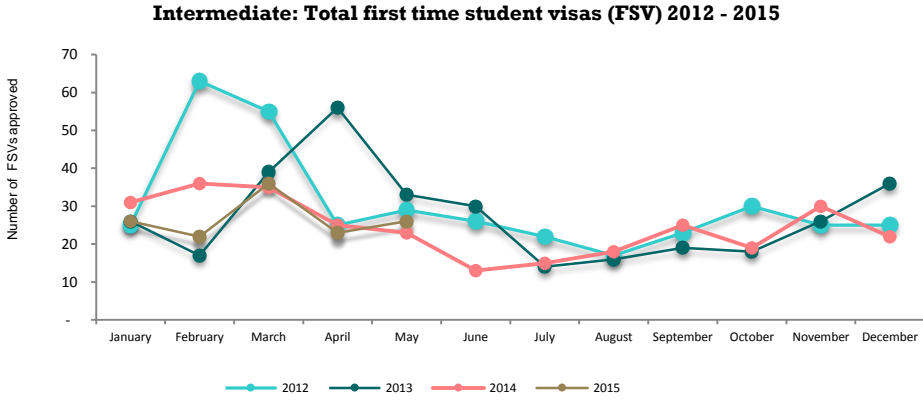
Takeaways:

- The primary school sector is tracking flat YTD.

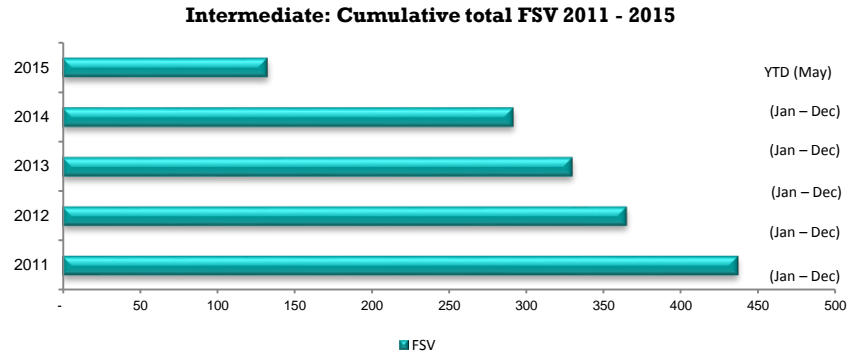
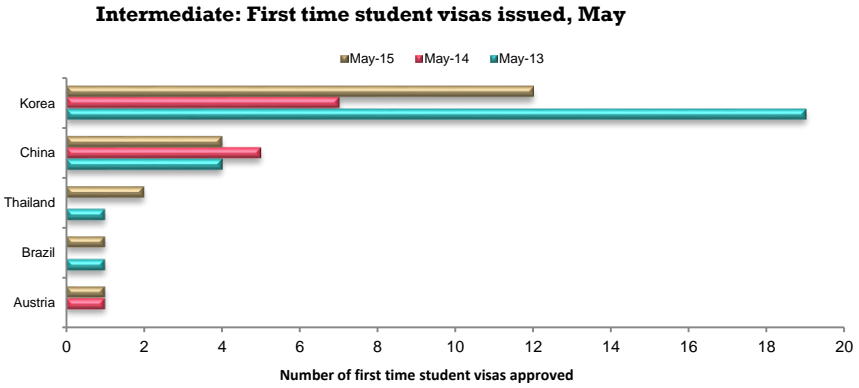
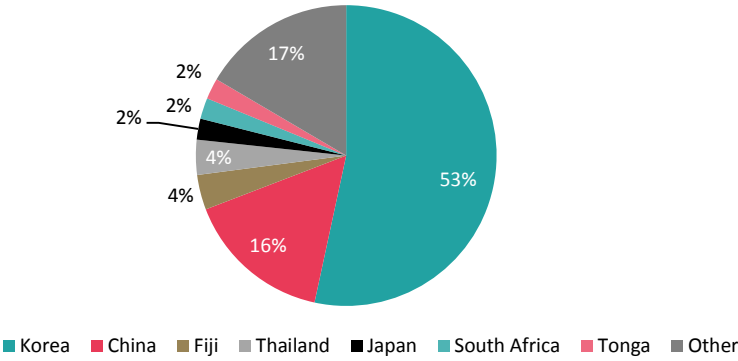
Intermediate schools:



May FSV		YTD FSV	
↑ 3	13%	↓ -17	-11%



YTD 2015 country breakdown of FSVs



- Takeaways:
- This sector experienced a 11% decline YTD.