

# Student Visa Dashboard First Quarter 2015

**Overall:**

**Market and sector overview**



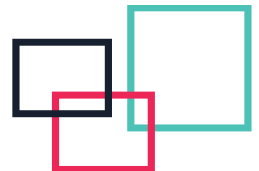
# Introduction

- *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 to study, 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 of less than three months are not required to enter on a student visa. Students who 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.
- 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 discussion will be required on the ownership and responsibility for retaining these students
    - 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
    - ENZ and MBIE are reviewing the Dashboard’s methodology to ensure the appropriate student visa sub categories are included.



# 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



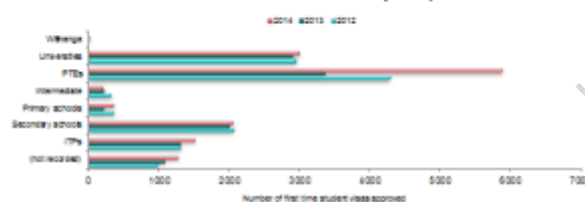
Overall: Renewed student visas (RSV) 2011 - 2014



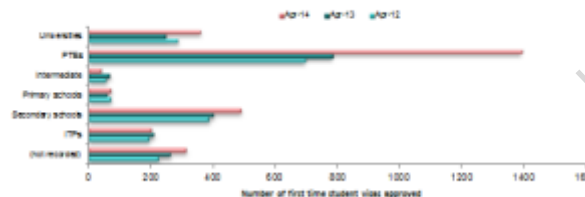
Takeaways:

- 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

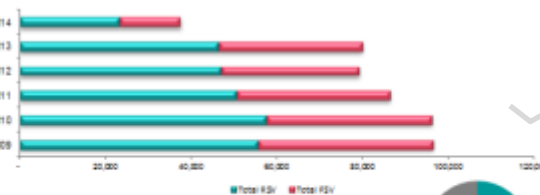
Overall: First time student visas issued by sector, YTD



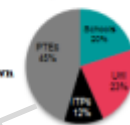
Overall: First time student visas issued by sector, April



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.

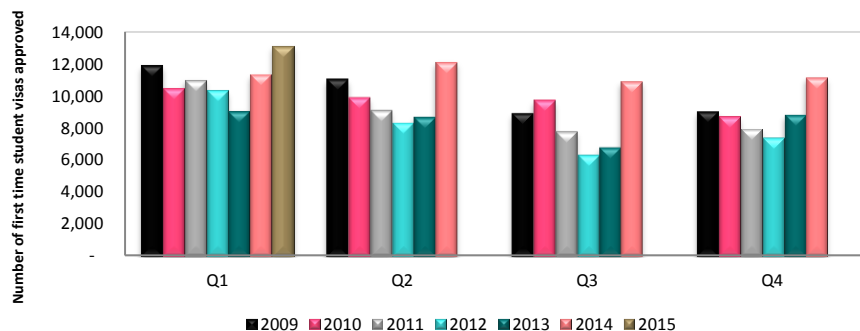
# Key trends



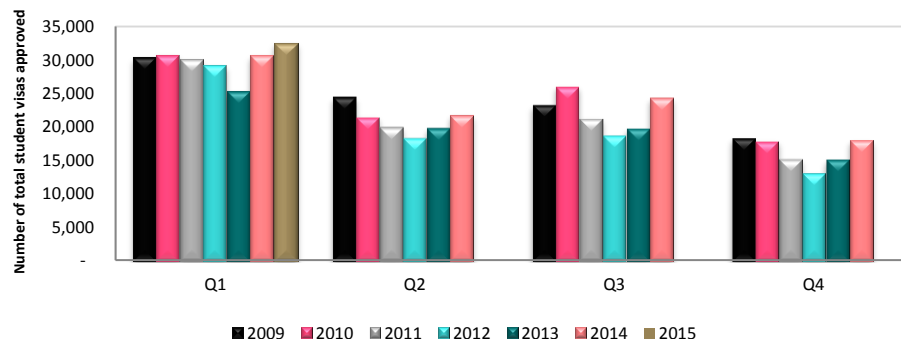
## Year to date - Quarter 1 (January to March)

- Q1 proves to be the strongest Q1 since 2009 for TSVs and FSVs.
- YTD/Q1 2015 continues to experience growth seen throughout 2014. Total student visas (TSVs) grew by 6% (1,882) and first time student visas (FSVs) also up 16% (1,777). Returning student visas (RSVs) remain flat up 1% (105).
- Q1 growth was driven by India, China, the USA, the Philippines and Colombia.
- The ITP, PTE and university sectors have experienced the strongest Q1 growth up 56% (721), 13% (559), and 8% (215).

Overall: Total first time student visas approved quarterly 2009 - 2015



Overall: Total student visas approved quarterly 2009 - 2015



# Key trends

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## March 2015:

- March experienced a 2% (230) TSV growth and FSV up 2% (72) on March 2014.
- The growth was driven by China, the Philippines, and Japan.
- India experienced a decline for the first time in 14 months down 8% (-154).
- All sectors, with the exception of the university and the PTE sector, experienced growth.

Increases

TSVs for March	Change	% change
China	444	9%
Philippines	96	35%
Japan	85	16%
South Africa	28	40%
Hong Kong	27	11%

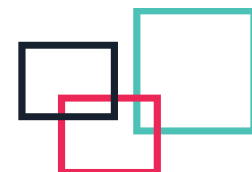
FSVs for March	Change	% change
Philippines	105	69%
Japan	86	34%
China	60	12%
South Africa	33	92%
Colombia	18	46%

Sector FSVs for March	Change	% change
Secondary school	87	21%
ITPs	51	22%
Intermediate	14	26%
Primary school	10	10%
Universities	-45	-12%
PTEs	-66	-4%

Decreases

Saudi Arabia	-32	-8%
Viet Nam	-35	-10%
United States	-54	-35%
Korea	-144	-14%
India	-154	-8%

Italy	-14	-58%
Iran	-14	-70%
Thailand	-24	-14%
Korea	-29	-12%
India	-219	-24%





# Overall performance

RSV = Renewed student visas (TSV – FSV = RSV)

FSV = First time student visas

TSV = Total student visas

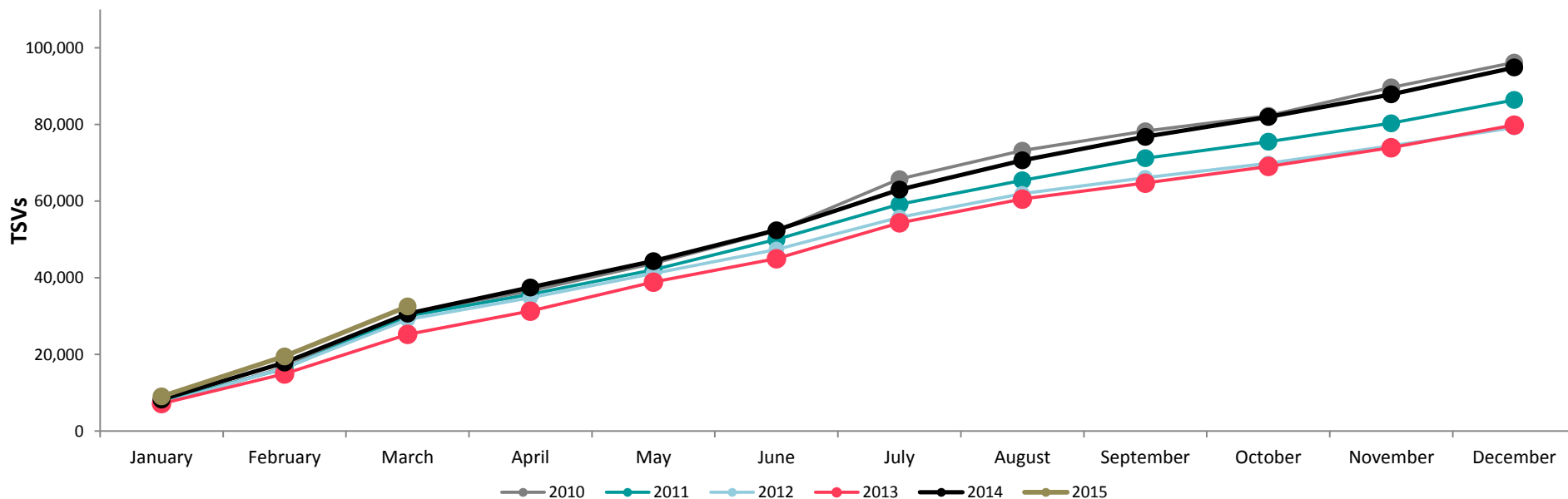
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## Month on month performance:

2014		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full year	2015		Jan	Feb	Mar	Q1/YTD
RSV	Yearly %	6%	13%	21%	8%	7%	6%	13%	9%	5%	4%	4%	4%	100%	RSV	Yearly %	6%	13%	21%	100%
	Result (2014 vs. 2013)	↑ 16%	↑ 24%	↑ 17%	↓ -1%	↓ -39%	↑ 32%	↓ -7%	↑ 11%	↑ 19%	↑ 7%	↑ 10%	↑ 9%	↑ 6%		2015 vs. 2014	↓ -6%	↓ -1%	↑ 2%	↑ 1%
FSV	Yearly %	13%	10%	9%	6%	9%	10%	7%	7%	6%	6%	8%	9%	100%	FSV	Yearly %	13%	10%	9%	100%
	Result (2014 vs. 2013)	↑ 16%	↑ 20%	↑ 51%	↑ 41%	↑ 38%	↑ 45%	↑ 61%	↑ 49%	↑ 81%	↑ 32%	↑ 30%	↑ 37%	↑ 37%		2015 vs. 2014	↑ 21%	↑ 22%	↑ 2%	↑ 16%
TSV	Yearly %	9%	12%	16%	7%	8%	8%	11%	8%	5%	5%	6%	6%	100%	TSV	Yearly %	9%	12%	16%	100%
	Result (2014 vs. 2013)	↑ 15%	↑ 23%	↑ 24%	↑ 13%	↓ -9%	↑ 14%	↑ 14%	↑ 24%	↑ 47%	↑ 20%	↑ 21%	↑ 18%	↑ 8%		2015 vs. 2014	↑ 10%	↑ 9%	↑ 2%	↑ 6%

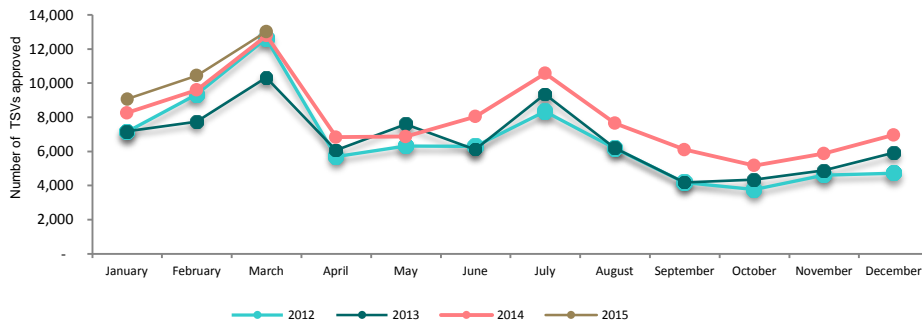
## Overall TSV cumulative trend



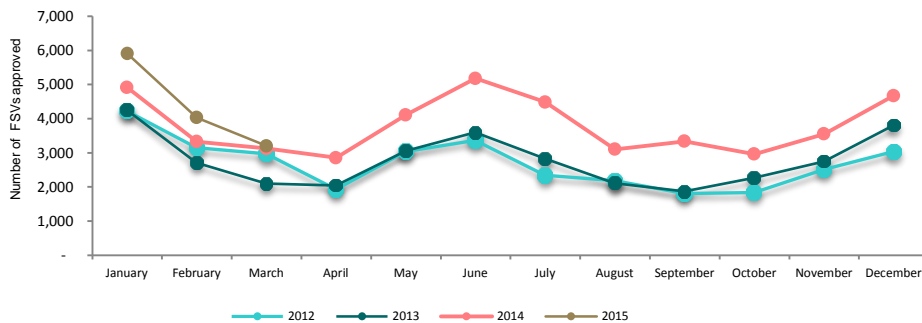


March RSV			March FSV			March TSV		
↑	158	2%	↑	72	2%	↑	230	2%

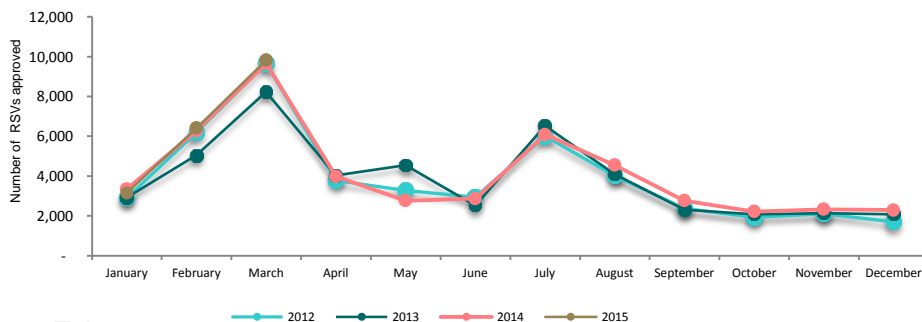
Overall: Total student visas (TSV) 2012 - 2015



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



Overall: Renewed student visas (RSV) 2012 - 2015



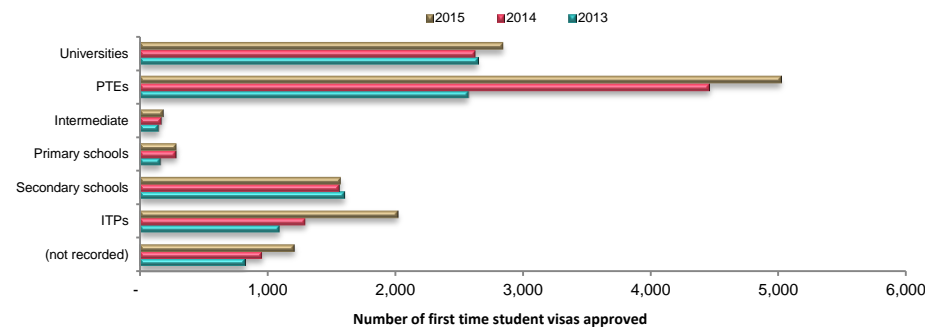
## Takeaways:

- TSVs and FSVs have experienced a strong start for the 2015 academic year.
- There has been a relatively balanced sector split YTD.

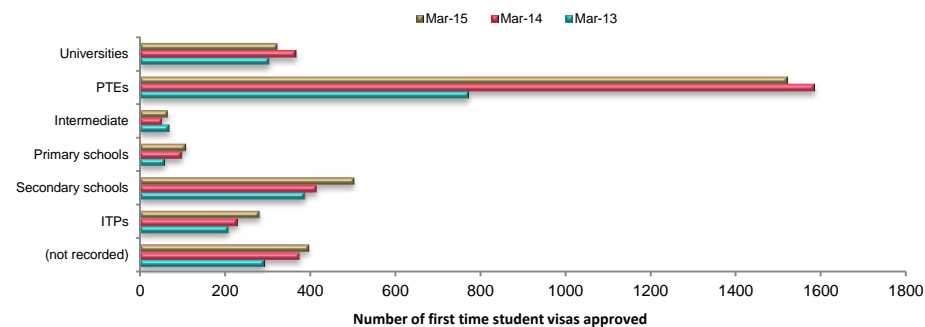
Q1 (January to March)

Q1 RSV			Q1 FSV			Q1 TSV		
↑	105	1%	↑	1,777	16%	↑	1,882	6%

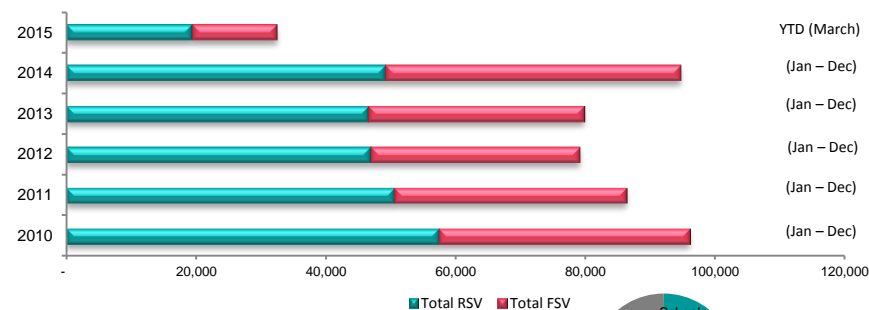
Overall: First time student visas issued by sector, YTD



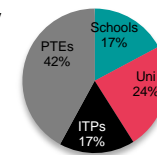
Overall: First time student visas issued by sector, March



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



YTD 2015 sector breakdown of FSVs

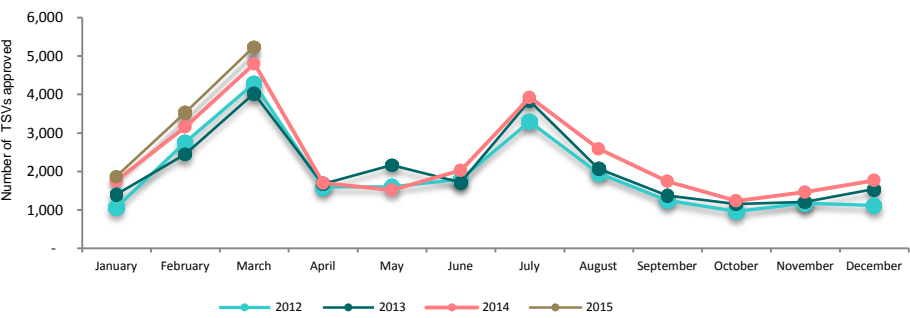




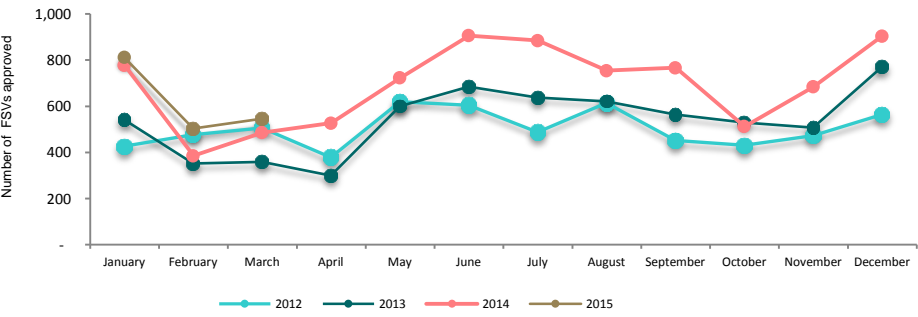
# China:

March RSV			March FSV		March TSV			
↑	384	9%	↑	60	12%	↑	444	9%

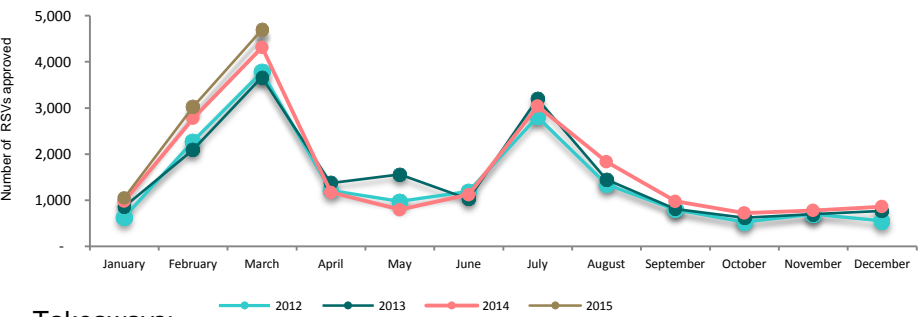
China: Total student visas (TSV) 2012 - 2015



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






China: Renewed student visas (RSV) 2012 - 2015

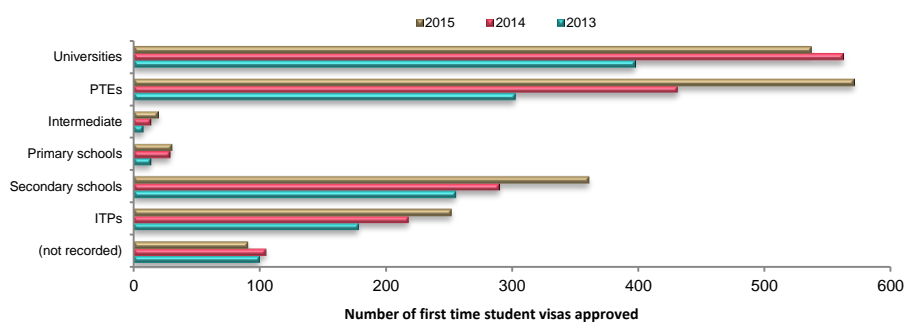


- Takeaways:
- China experienced a strong start to 2015.
  - The PTE, secondary school, and ITP sectors have experienced strong growth YTD.

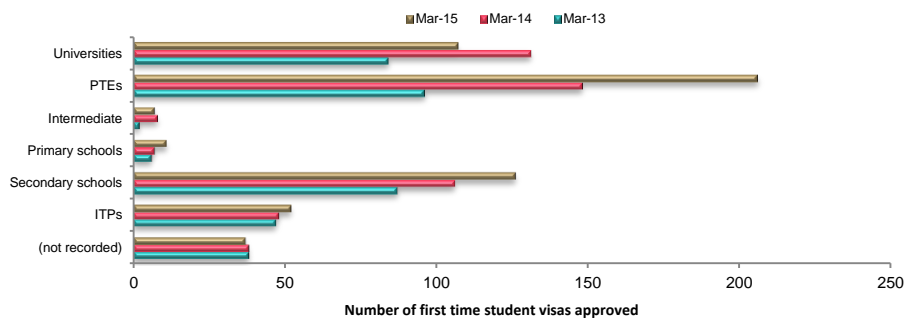
Q1 (January to March)

Q1 RSV			Q1 FSV		Q1 TSV			
	703	9%		214	13%		917	9%

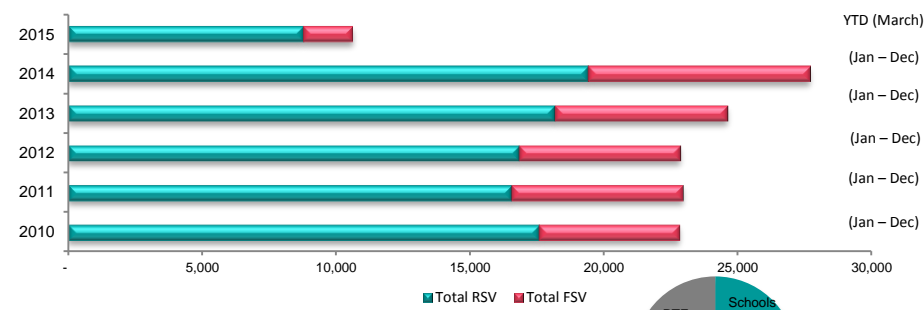
China: First time student visas issued by sector, YTD



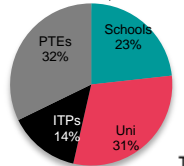
China: First time student visas issued by sector, March



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






YTD 2015 sector breakdown of FSVs

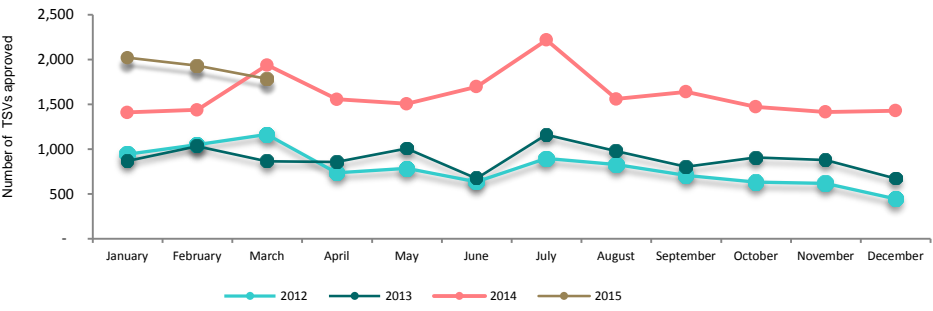


March RSV			March FSV		March TSV		
↑	65	6%	↓	-219	↓	-154	-8%

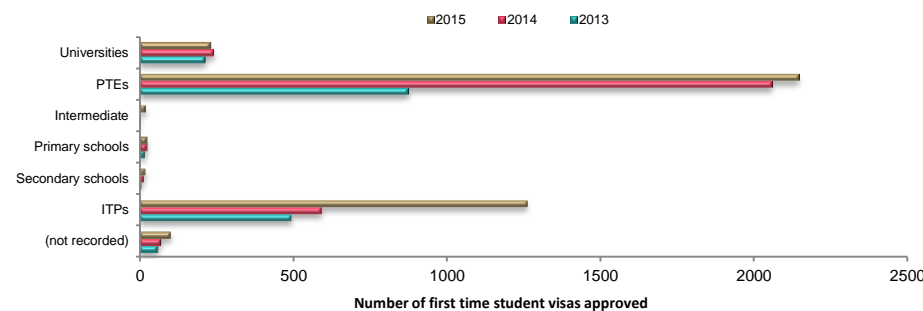
Q1 (January to March)

Q1 RSV		Q1 FSV		Q1 TSV	
 153	9%	 799	27%	 952	20%

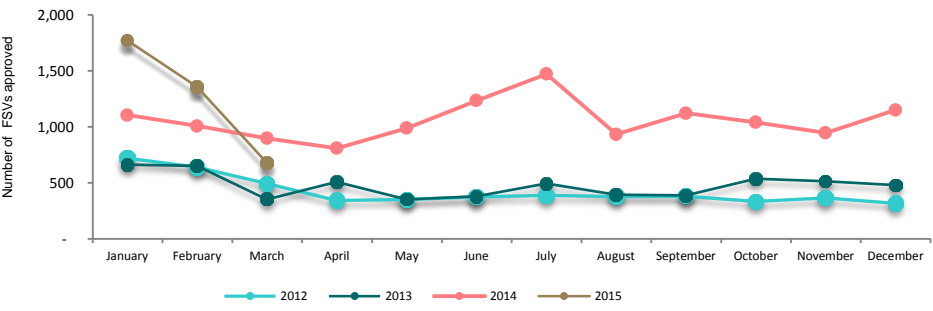
India: Total student visas (TSV) 2012 - 2015



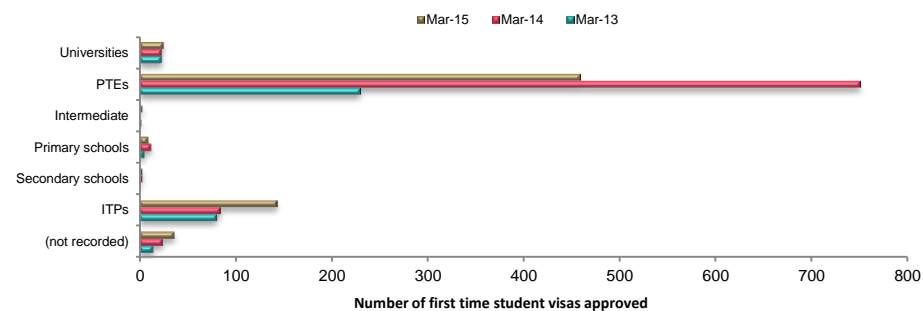
India: First time student visas issued by sector, YTD



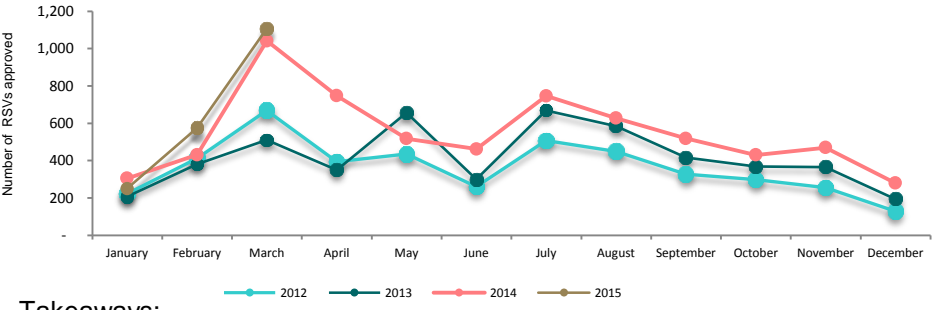
India: First time student visas (FSV) 2012 - 2015



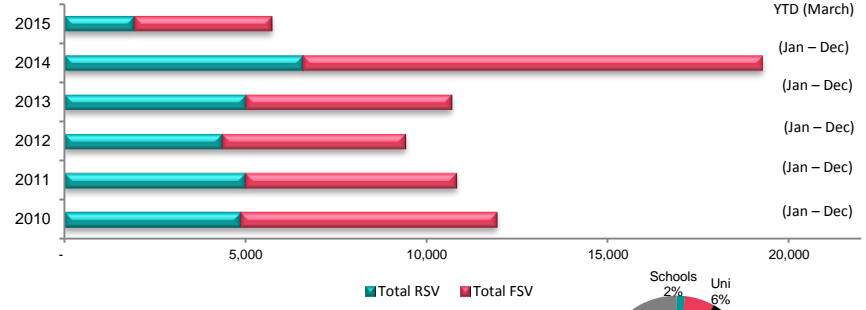
India: First time student visas issued by sector, March



India: Renewed student visas (RSV) 2012 - 2015



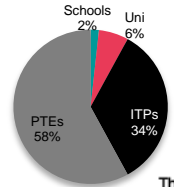
India: Cumulative total for RSV vs. FSV 2010 - 2015



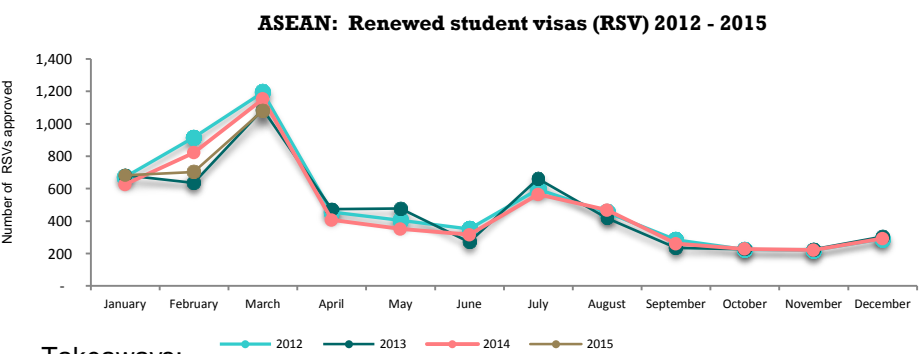
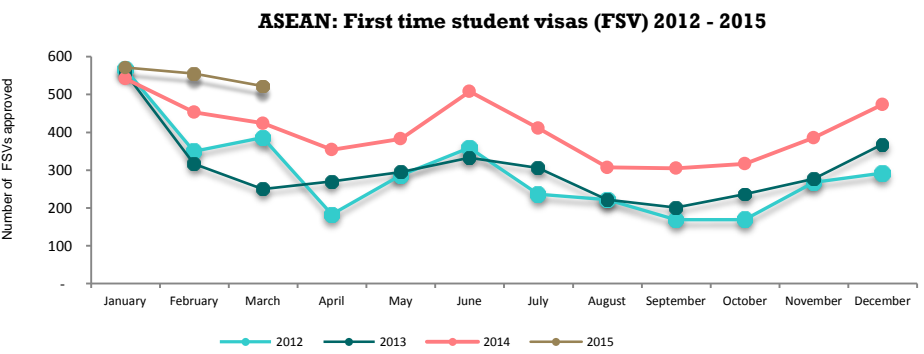
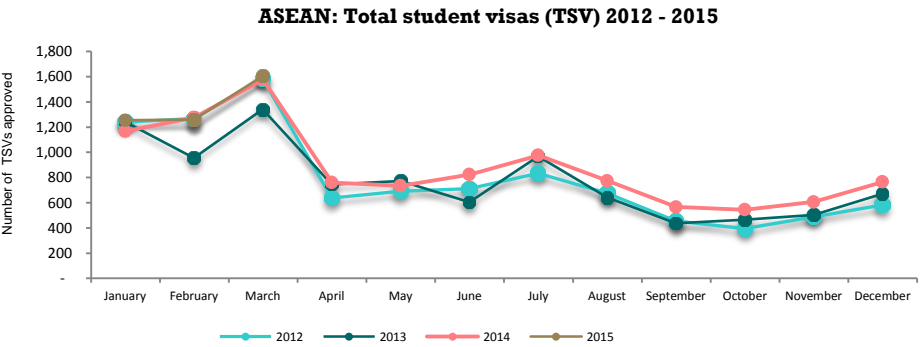
## Takeaways:

- YTD this market has seen strong growth on 2014, up 20% in TSVs.
- March sees the first negative result in 14 months. Signals from the market suggest this decline is due to an unexpected earlier surge in applications experienced from December – February.

YTD 2015 sector breakdown of FSVs



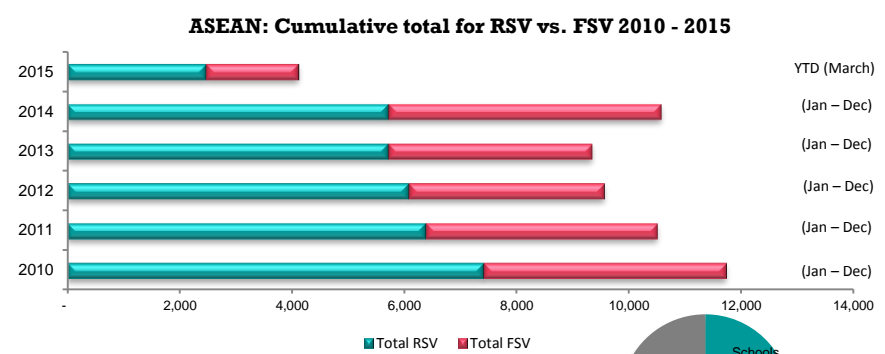
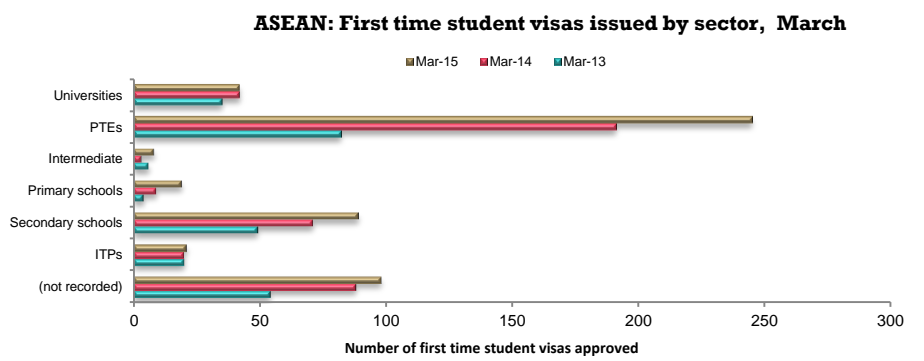
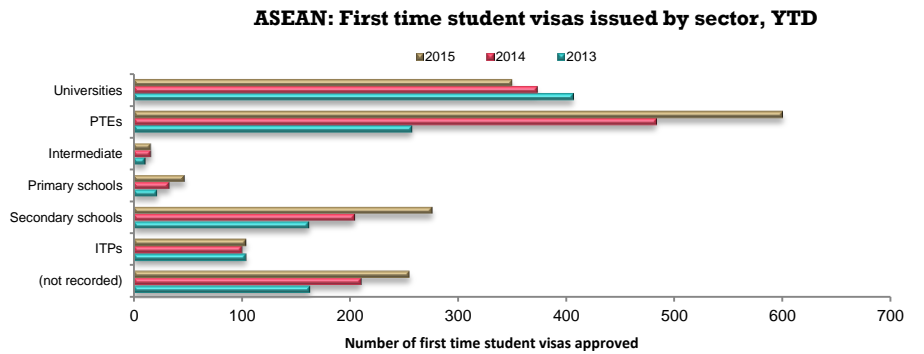
March RSV			March FSV		March TSV			
↓	-71	-6%	↑	98	23%	↑	27	2%



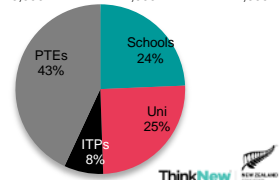
- Takeaways:**
- The ASEAN market continues to trend positively.
  - Returning students continue to decline, down 5% (132).
  - The PTE and secondary school sectors have experienced strong growth.

Q1 (January to March)

Q1 RSV		Q1 FSV		Q1 TSV	
↓ -132	-5%	↑ 229	16%	↑ 97	2%



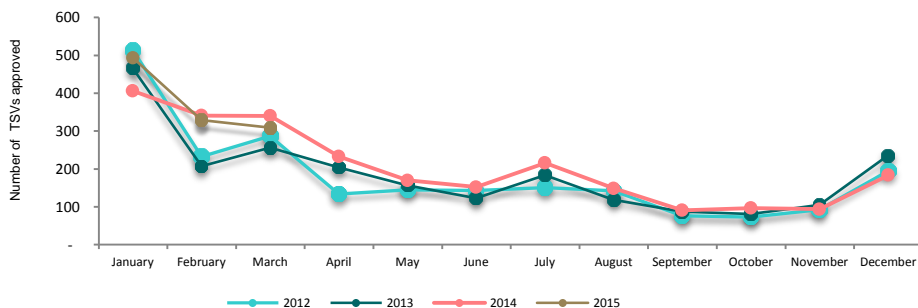
**YTD 2015 sector breakdown of FSVs**



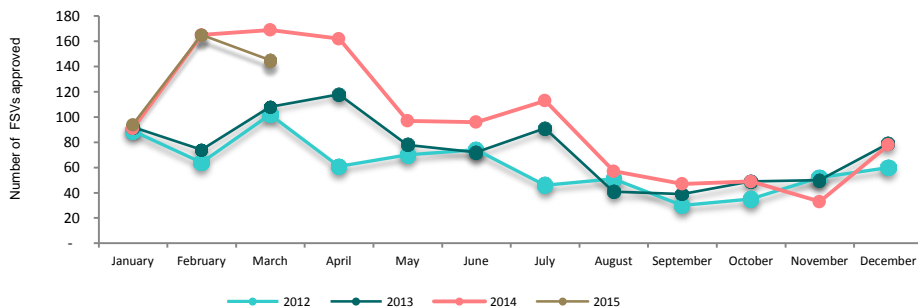
# Thailand:

March RSV		March FSV		March TSV	
↓	-7	↓	-24	↓	-31
	-4%		-14%		-9%

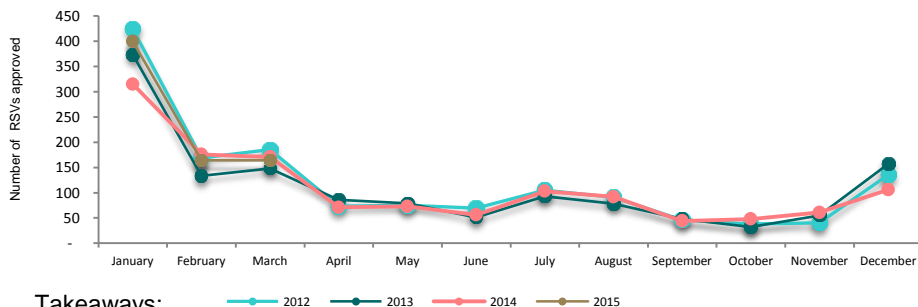
Thailand: Total student visas (TSV) 2012 - 2015



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



Thailand: Renewed student visas (RSV) 2012 - 2015



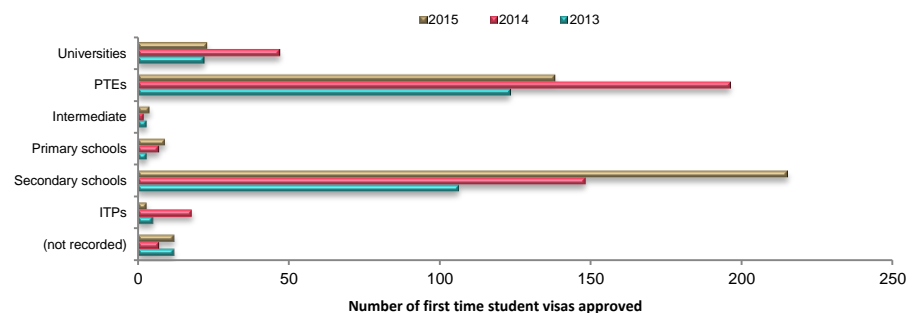
## Takeaways:

- This market experienced a strong start to the year, however a decline in FSVs in March has slowed the YTD position.
- Thai domestic changes in university semester timing in 2015 (usually a March start - now a May start) has changed the timing students would normally apply for student visas to later in the year. Also, restrictions on government officials travelling is impacting students who may be enrolled in New Zealand institutions as they are unable to travel to NZ.

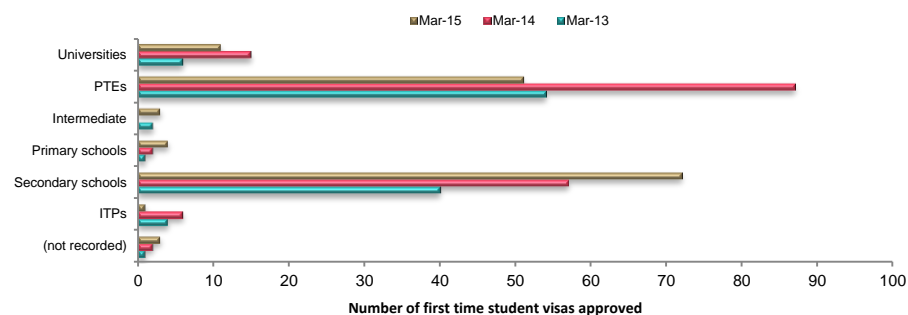
Q1 (January to March)

Q1 RSV		Q1 FSV		Q1 TSV	
↑	66	↓	-21	↑	45
	10%		-5%		4%

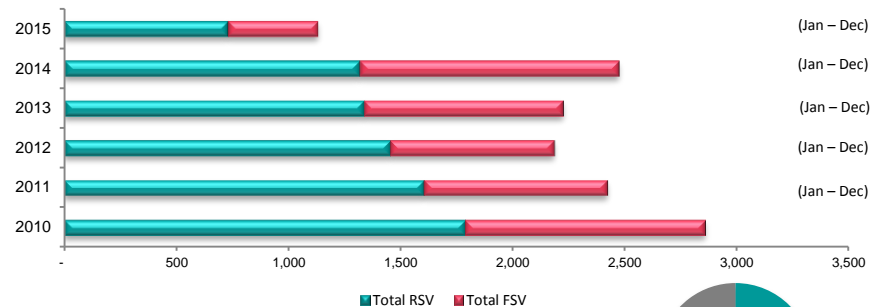
Thailand: First time student visas issued by sector, YTD



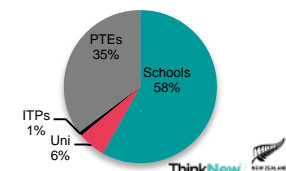
Thailand: First time student visas issued by sector, March









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



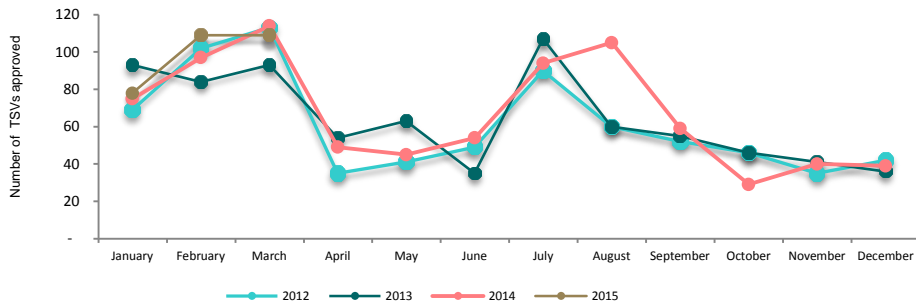
YTD 2015 sector breakdown of FSVs



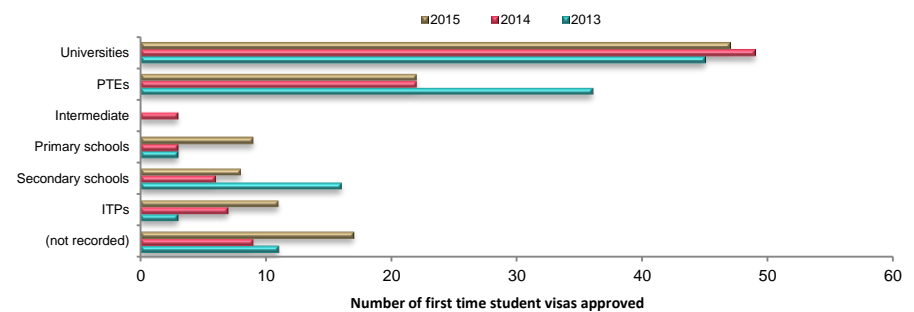
March RSV		March FSV		March TSV	
	-1		-4		-5
	-1%		-16%		-4%

Q1 RSV		Q1 FSV		Q1 TSV	
	-5		15		10
	-3%		15%		3%

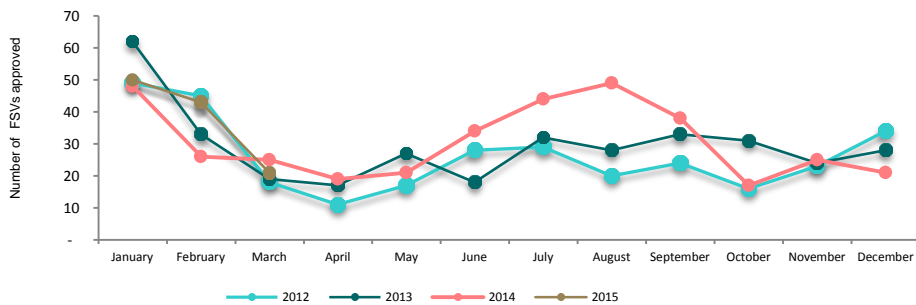
Indonesia: Total student visas (TSV) 2012 - 2015



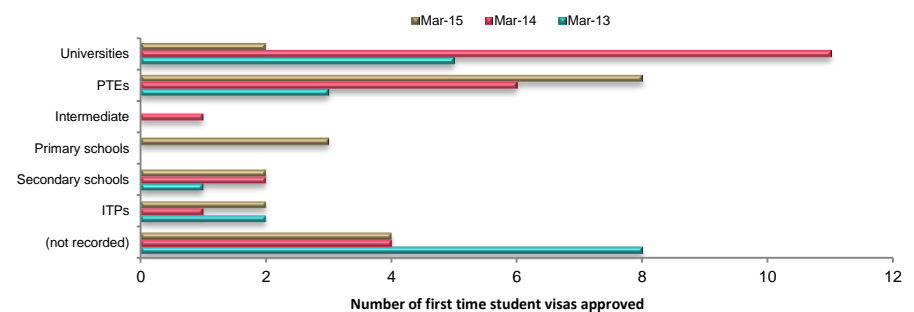
Indonesia: First time student visas issued by sector, YTD



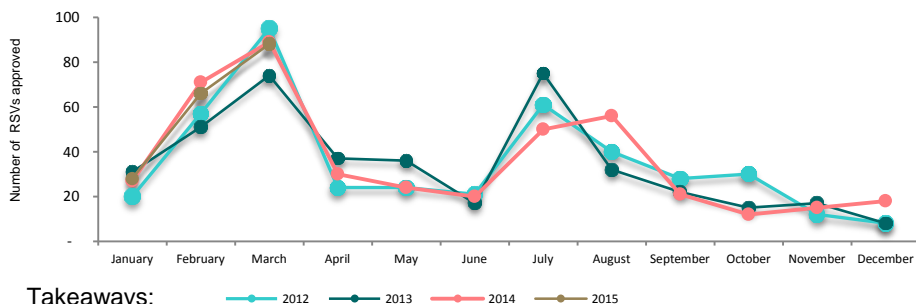
Indonesia: First time student visas (FSV) 2012 - 2015



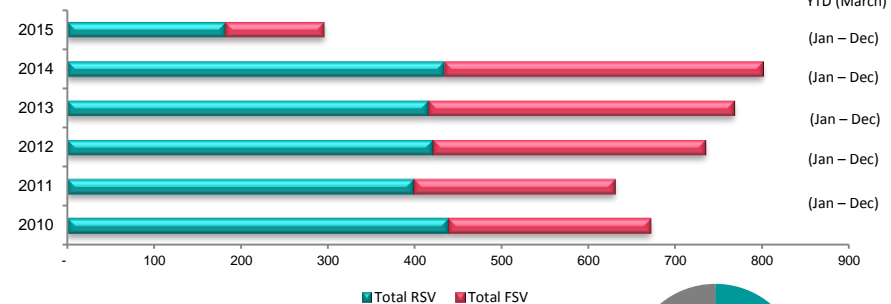
Indonesia: First time student visas issued by sector, March



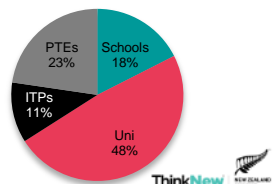
Indonesia: Renewed student visas (RSV) 2012 - 2015



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



YTD 2015 sector breakdown of FSVs

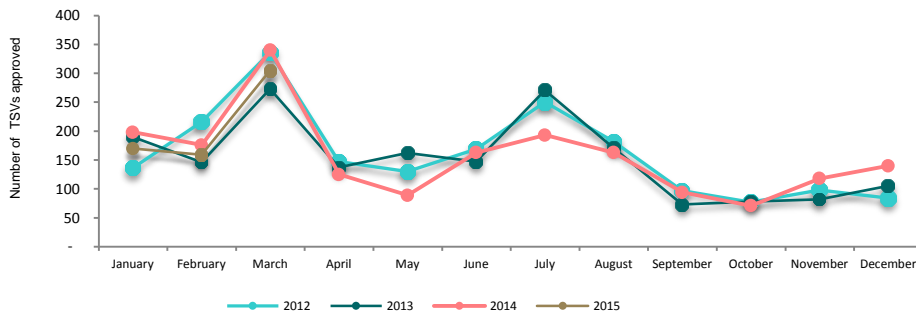


## Takeaways:

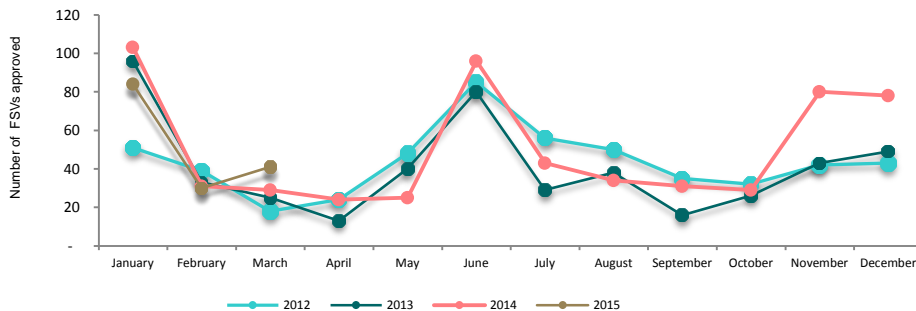
- Overall this market is tracking flat, up 3% (10) in TSVs.
- Signals from the market suggest that the strong New Zealand dollar coupled with strong competitor recruitment from European countries is slowing growth.
- ENZ has a range of activities scheduled for 2015 which is expected to have a positive impact on student visa application numbers late in the year.

March RSV		March FSV		March TSV	
↓	-47	↑	12	↓	-35
	-15%		41%		-10%

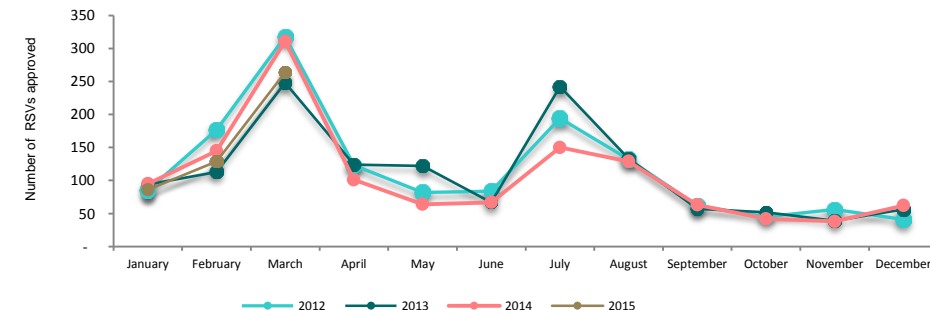
**Viet Nam: Total student visas (TSV) 2012 - 2015**



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



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



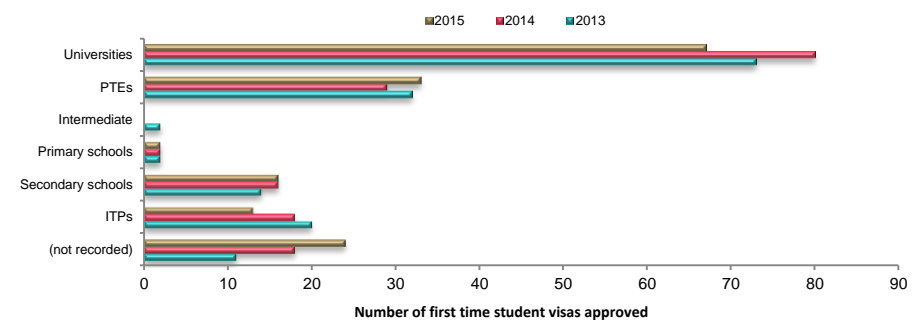
## Takeaways:

- This market has had a negative start to the year, down 11% (-80 TSVs)
- 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 these profiles to guide activities in-market.

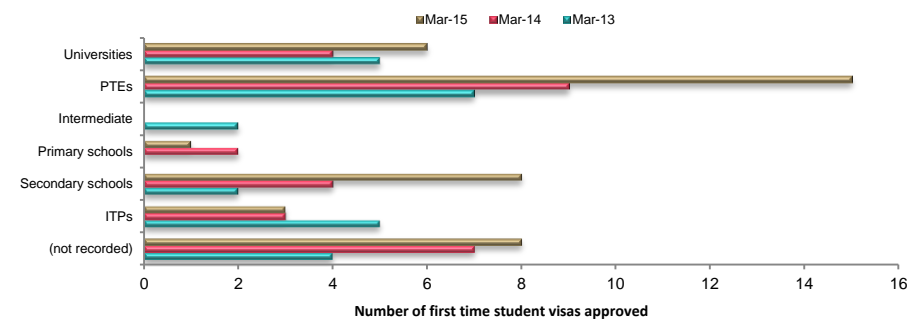
Q1 (January to March)

Q1 RSV		Q1 FSV		Q1 TSV	
↓	-72	↓	-8	↓	-80
	-13%		-5%		-11%

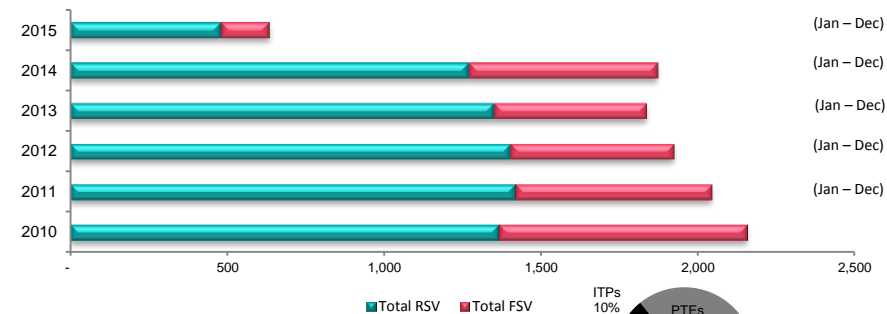
**Viet Nam: First time student visas issued by sector, YTD**



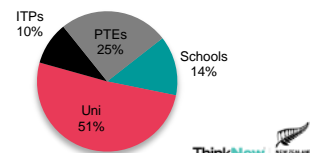
**Viet Nam: First time student visas issued by sector, March**



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



**YTD 2015 sector breakdown of FSVs**

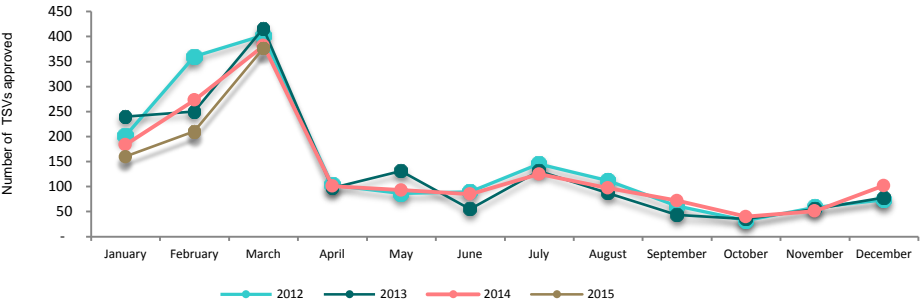


March RSV		March FSV		March TSV	
↓	-6	↓	-2%	↓	-6
↓	-2%	↓	0	↓	0%
↓	-6	↓	-2%	↓	-6

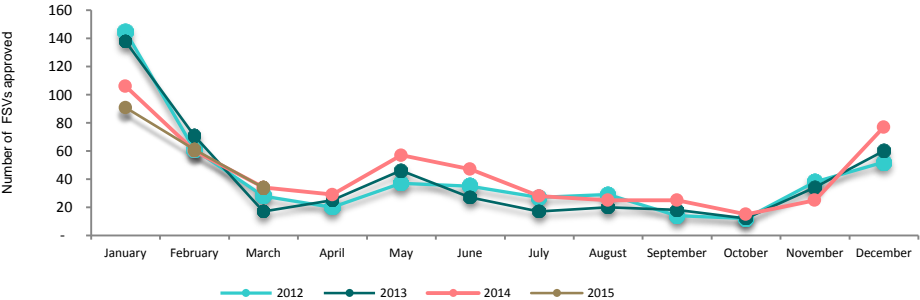
Q1 (January to March)

Q1 RSV		Q1 FSV		Q1 TSV	
↓	-79	↓	-12%	↓	-93
↓	-12%	↓	-7%	↓	-11%

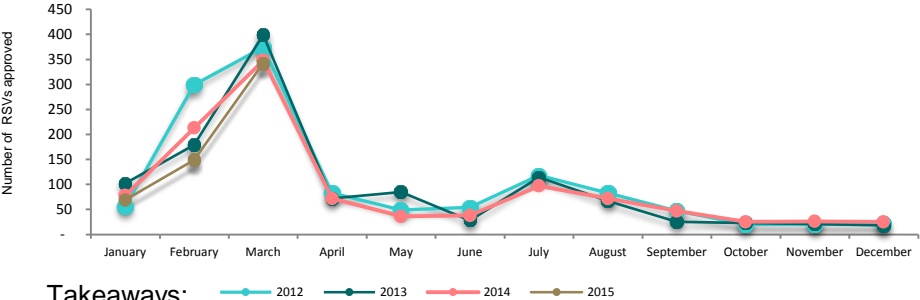
Malaysia: Total student visas (TSV) 2012 - 2015



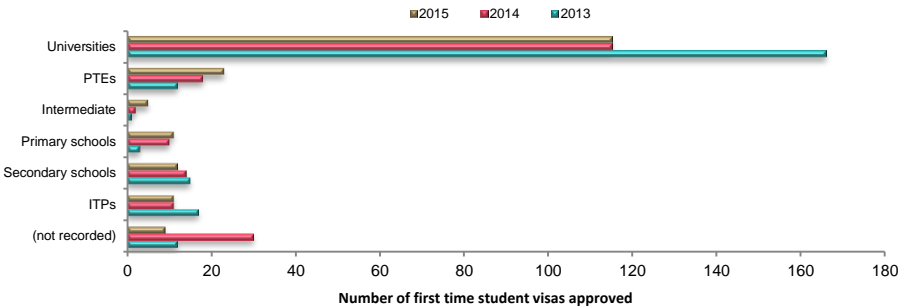
Malaysia: First time student visas (FSV) 2012 - 2015



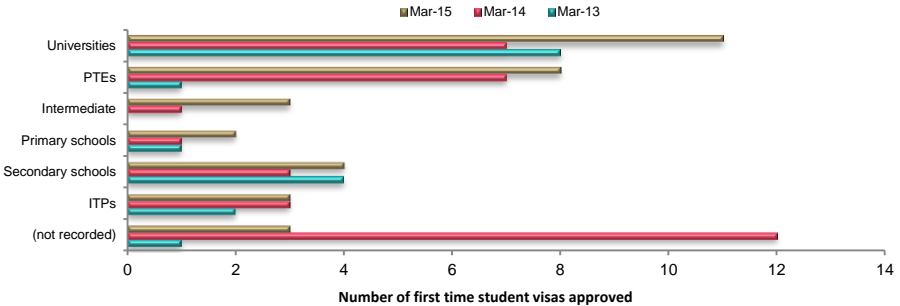
Malaysia: Renewed student visas (RSV) 2012 - 2015



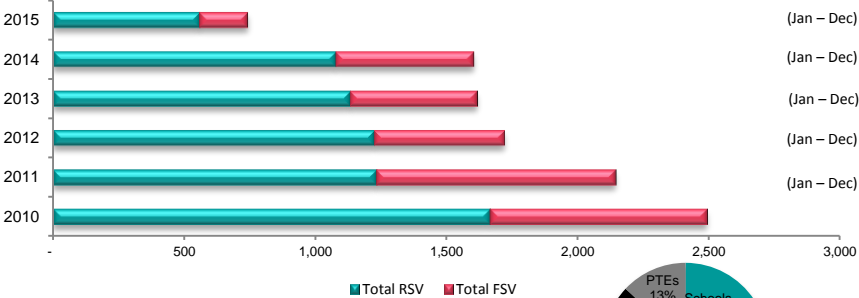
Malaysia: First time student visas issued by sector, YTD



Malaysia: First time student visas issued by sector, March



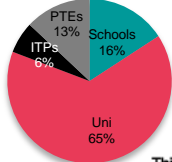
Malaysia: Cumulative total for RSV vs. FSV 2010 - 2015






Takeaways:




- This market has tracked flat throughout 2014 and has experienced a relatively significant decline in YTD down 11% TSVs.

YTD 2015 sector breakdown of FSVs

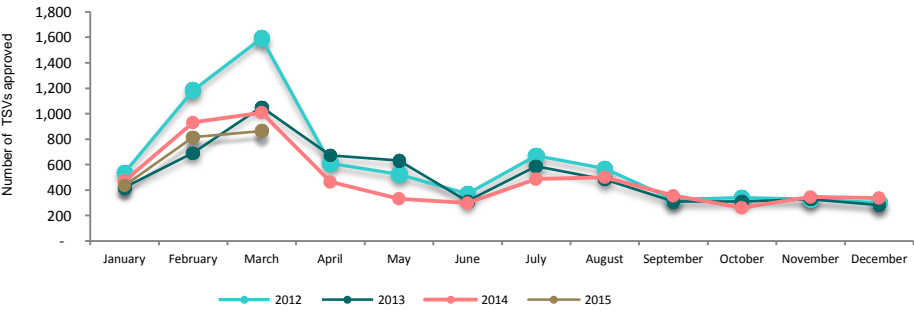




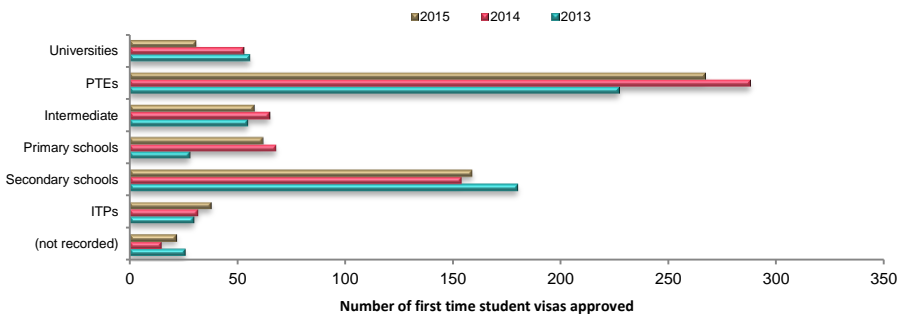
March RSV		March FSV		March TSV	
	-115		-29		-144
	-15%		-12%		-14%

Q1 RSV		Q1 FSV		Q1 TSV	
	-257		-38		-295
	-15%		-6%		-12%

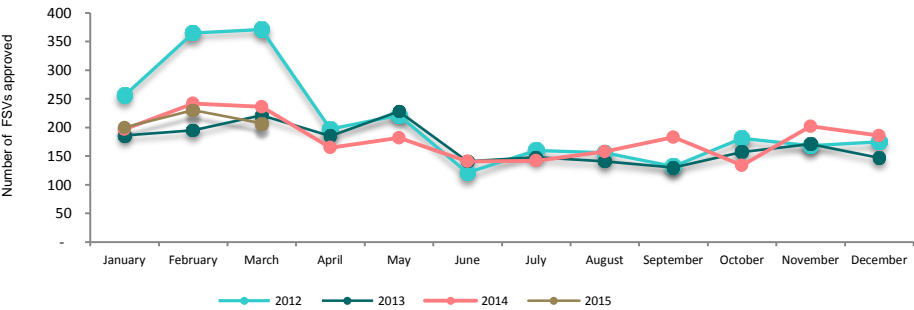
Korea: Total student visas (TSV) 2012 - 2015



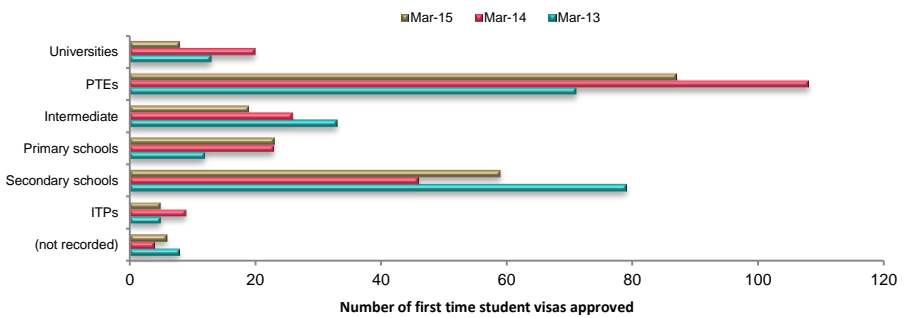
Korea: First time student visas issued by sector, YTD



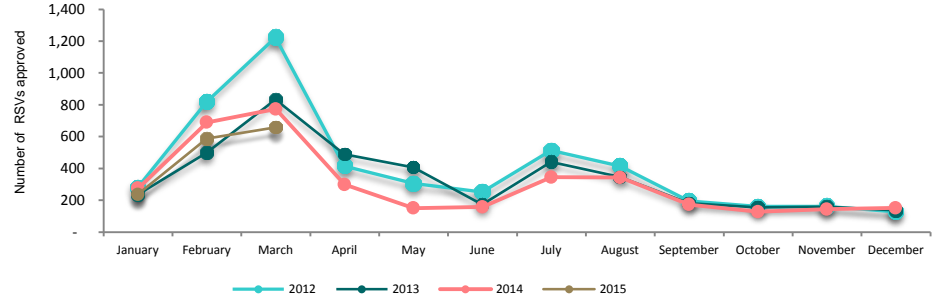
Korea: First time student visas (FSV) 2012 - 2015



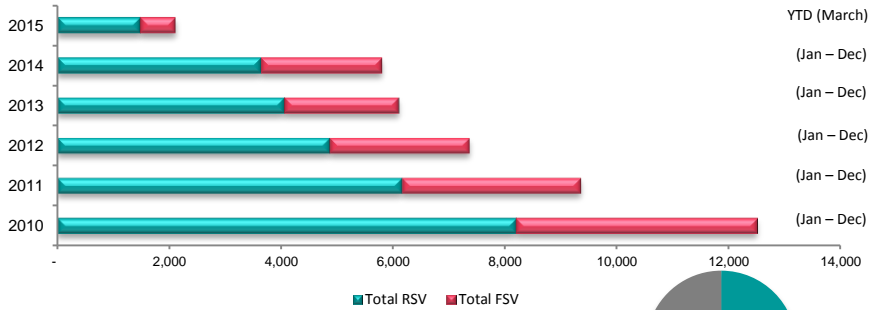
Korea: First time student visas issued by sector, March



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



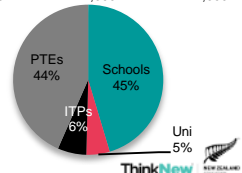
Korea: Cumulative total for RSV vs. FSV 2010 - 2015






## Takeaways:

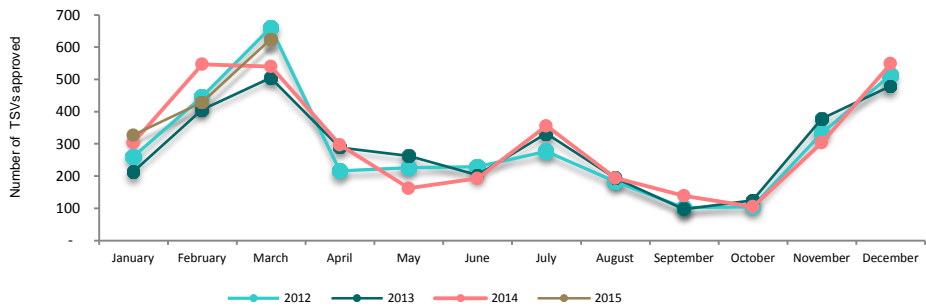
- This market continues to see significant declines, down 12% (295 TSVs) YTD.
- In-market intelligence suggests that the decrease is driven by a notable shift by students staying for shorter periods and requiring visitor visas instead of student visas. YTD visitor visas approvals for 0 -19 year olds have increased by 22% (21). This is more apparent in the school sector which has attracted larger groups of short-term and English Language students

YTD 2015 sector breakdown of FSVs

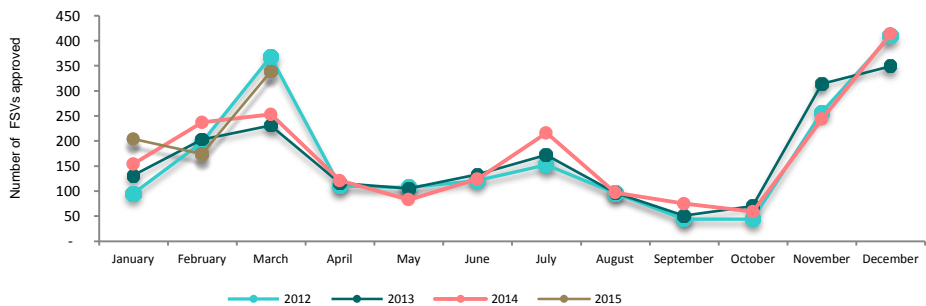


March RSV		March FSV		March TSV	
	-1		0%		85
			34%		16%

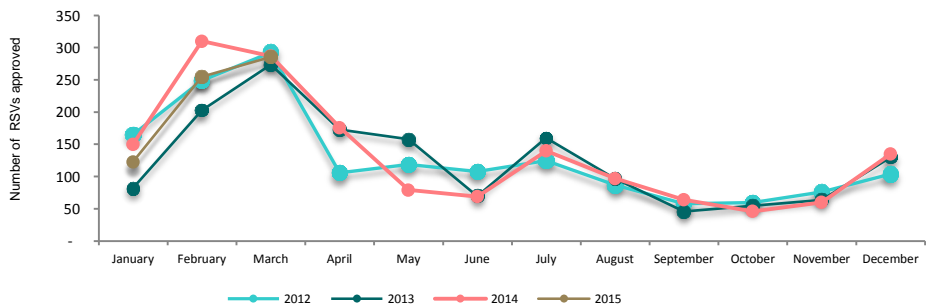
Japan: Total student visas (TSV) 2012 - 2015



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






Japan: Renewed student visas (RSV) 2012 - 2015



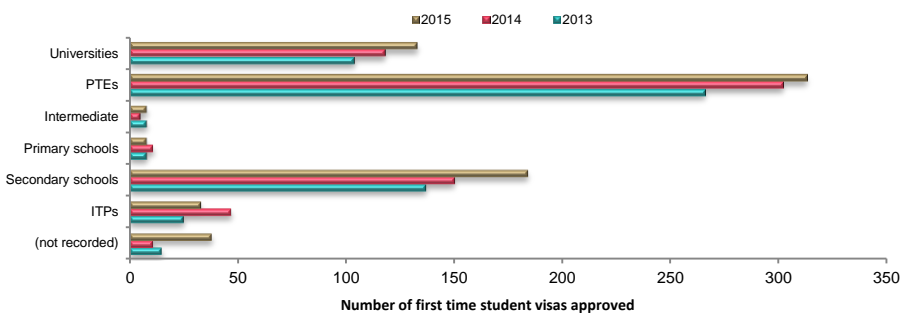
## Takeaways:

- Japan has been tracking relatively flat YTD, down 1% (-10)
- While PTE and secondary schools have seen strong growth, the university sector appears to be in decline.

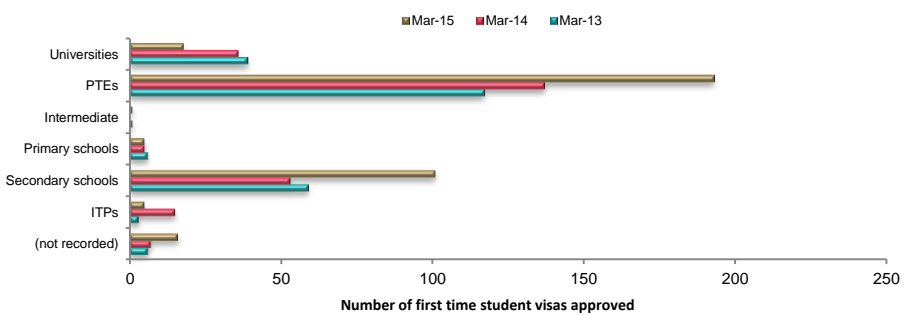
Q1 (January to March)

Q1 RSV		Q1 FSV		Q1 TSV	
	-83		73		-10
	-11%		11%		-1%

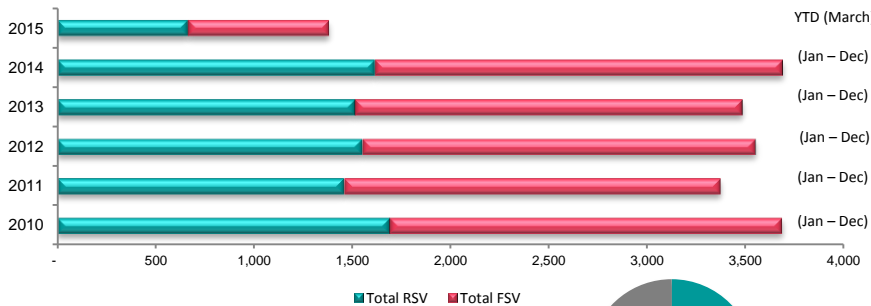
Japan: First time student visas issued by sector, YTD



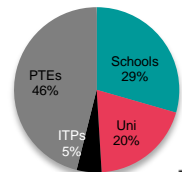
Japan: First time student visas issued by sector, March



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



YTD 2015 sector breakdown of FSVs

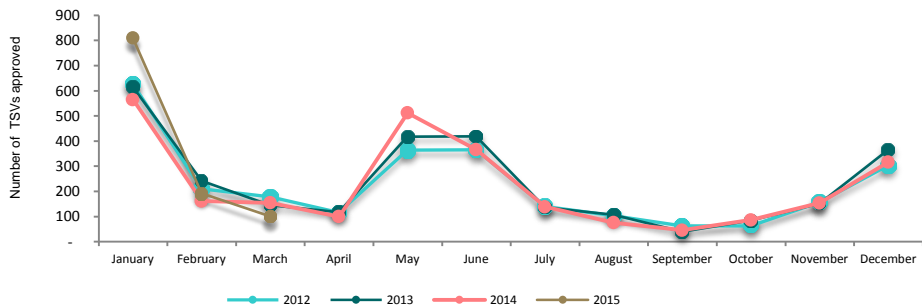


# United States of America:

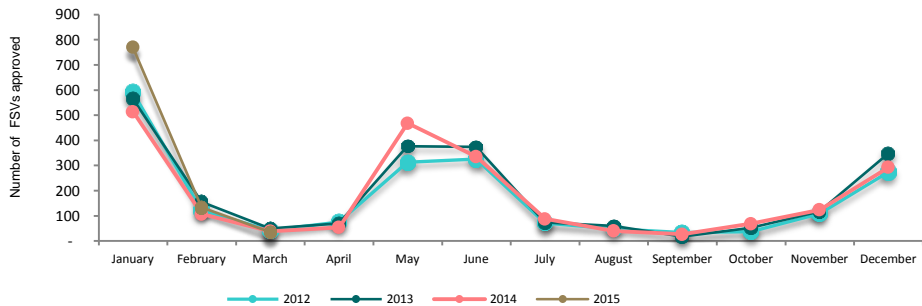


March RSV		March FSV		March TSV	
↓	-51	↓	-44%	↓	-3
			-8%	↓	-54
					-35%

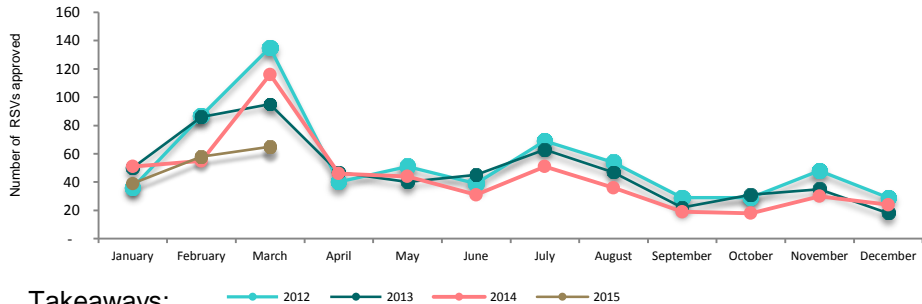
United States of America: Total student visas (TSV) 2012 - 2015



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



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



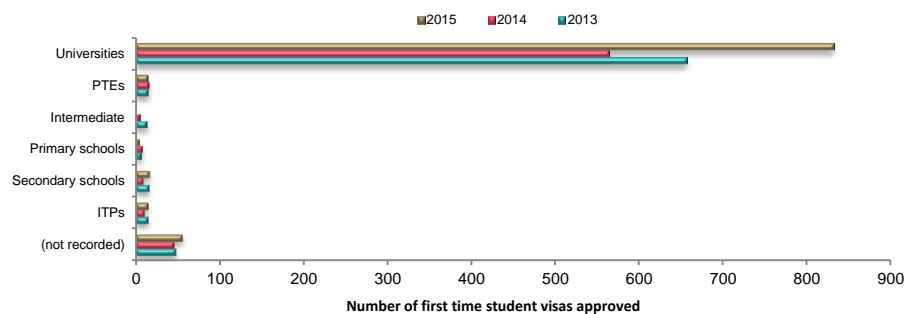
## Takeaways:

- This market started the academic year in a strong position, however a negative March has slowed the Q1 position.

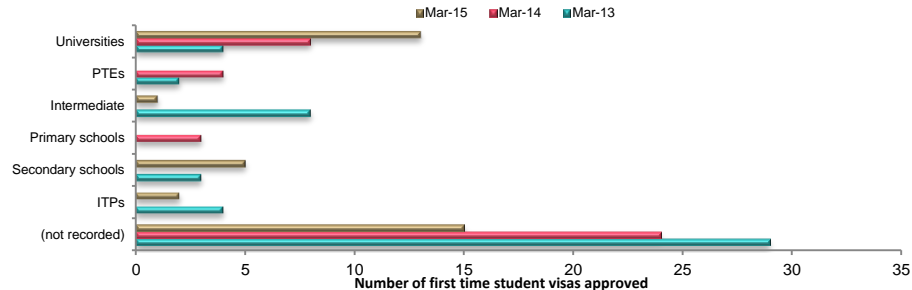
Q1 (January to March)

Q1 RSV		Q1 FSV		Q1 TSV	
↓	-60	↑	281	↑	221
	-27%		43%		25%

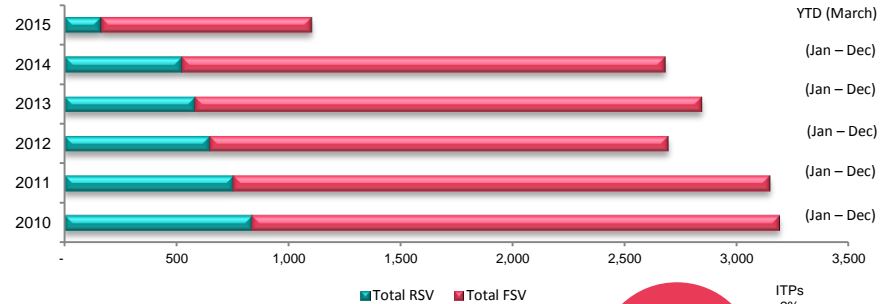
United States of America: First time student visas issued by sector, YTD



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

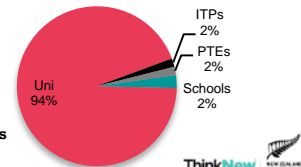


United States of America: Cumulative total for RSV vs. FSV 2010 - 2015



YTD (March)

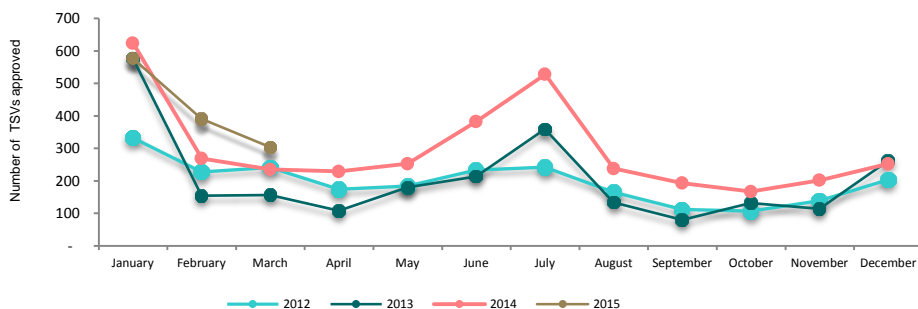
YTD 2015 sector breakdown of FSVs



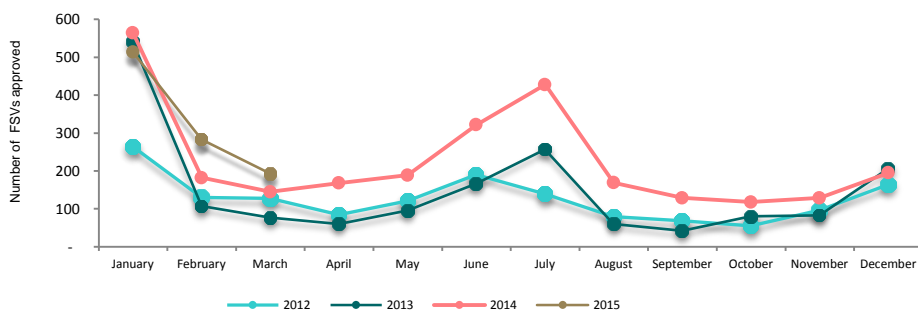
# Latin America:

March RSV			March FSV		March TSV			
↑	21	23%	↑	48	33%	↑	69	29%

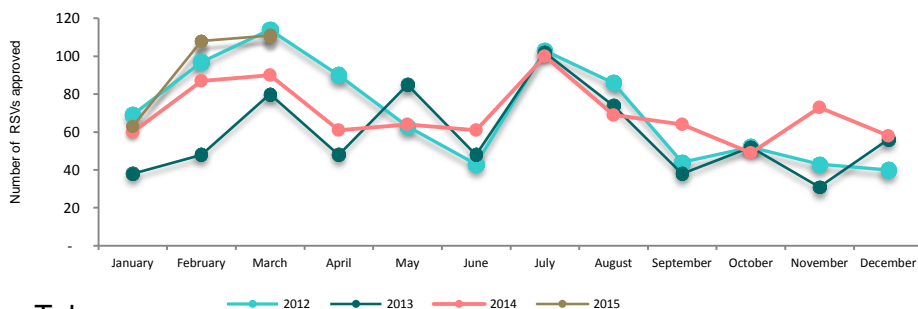
**Latin America: Total student visas (TSV) 2012 - 2015**



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



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



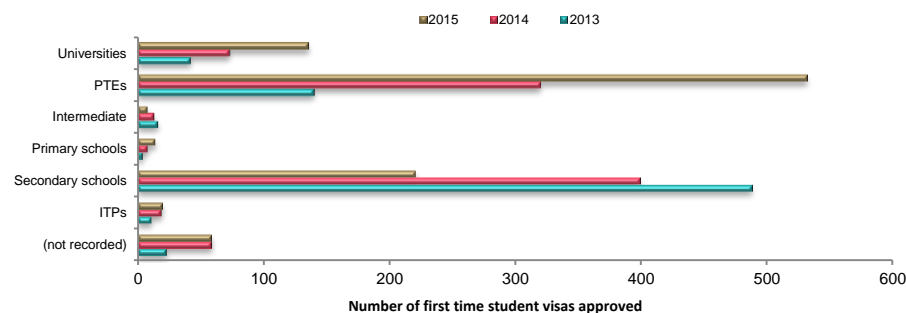
## Takeaways:

- This market experienced significant growth in 2014, which has continued into Q1 2015, especially within the university and PTE sectors.

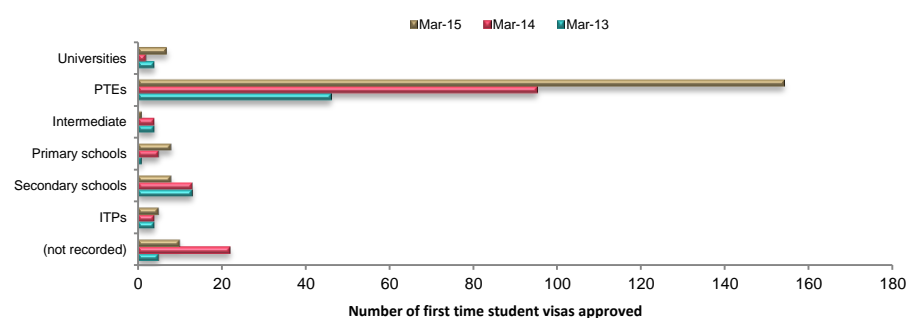
Q1 (January to March)

Q1 RSV			Q1 FSV		Q1 TSV		
↑	45	19%	↑	99	11%	↑ 144	13%

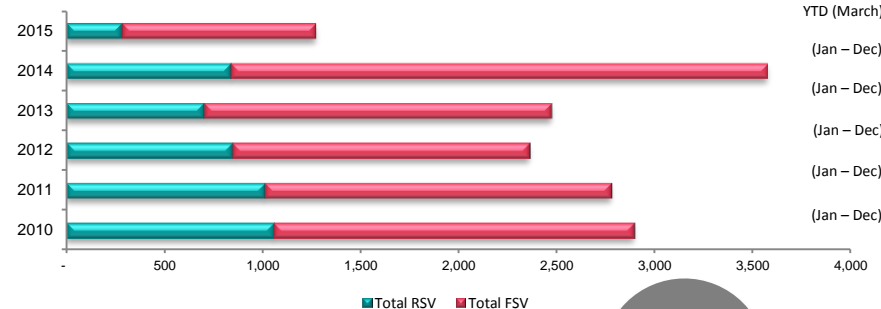
**Latin America: First time student visas issued by sector, YTD**



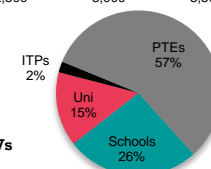
**Latin America: First time student visas issued by sector, March**



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



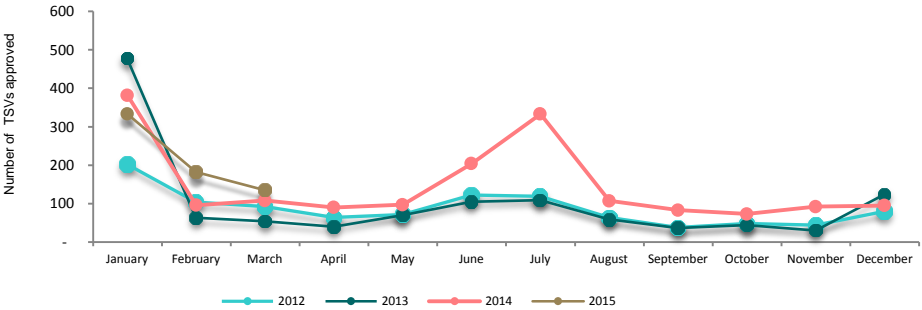
**YTD 2015 sector breakdown of FSVs**



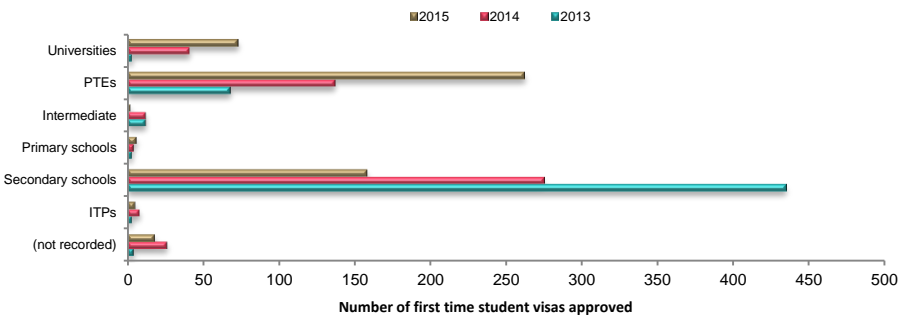
March RSV		March FSV		March TSV	
↑	11	31%	↑	16	22%
↑	27	25%			

Q1 RSV		Q1 FSV		Q1 TSV	
↑	44	53%	↑	21	4%
↑	65	11%			

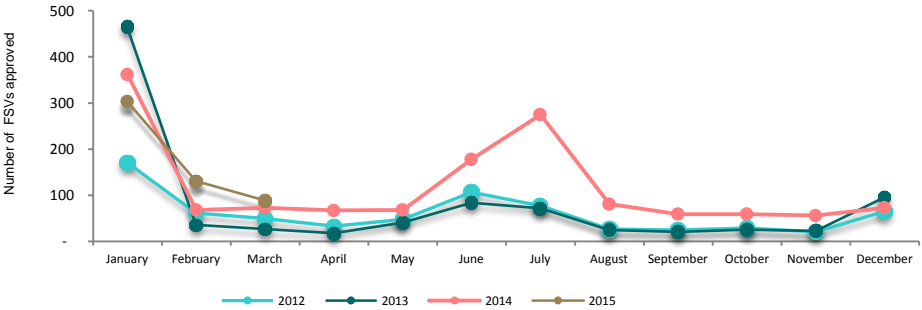
Brazil: Total student visas (TSV) 2012 - 2015



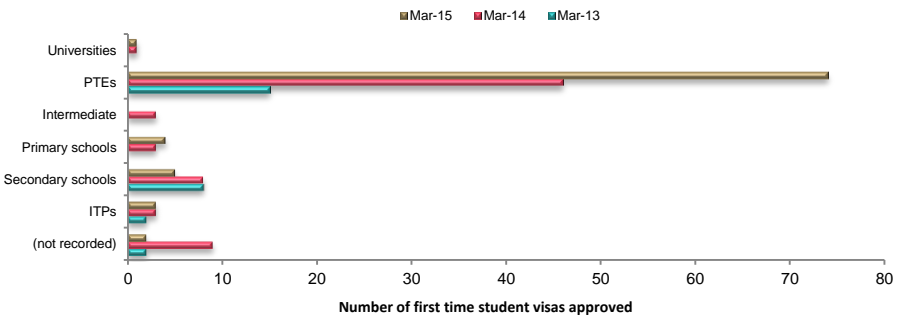
Brazil: First time student visas issued by sector, YTD



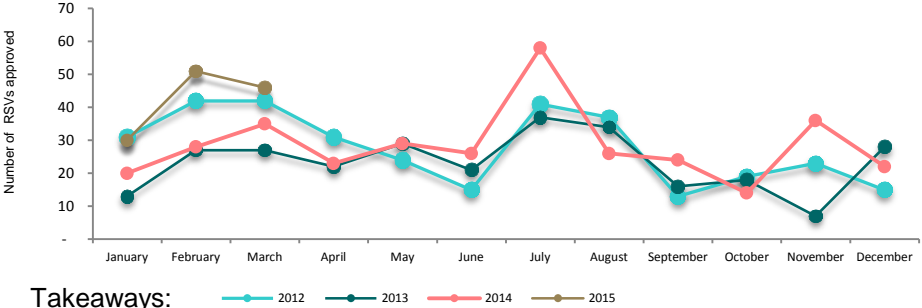
Brazil: First time student visas (FSV) 2012 - 2015



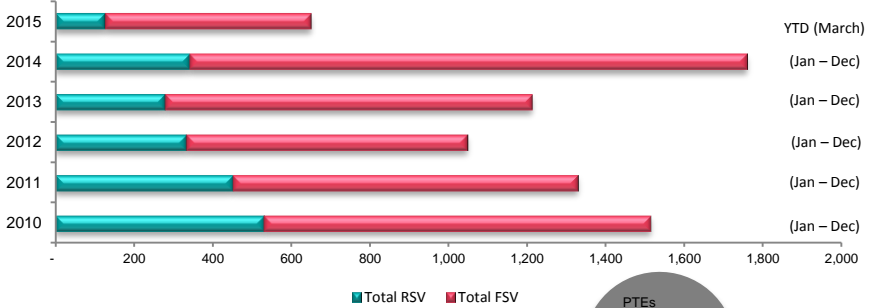
Brazil: First time student visas issued by sector, March



Brazil: Renewed student visas (RSV) 2012 - 2015



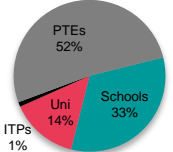
Brazil: Cumulative total for RSV vs. FSV 2010 - 2015



## Takeaways:

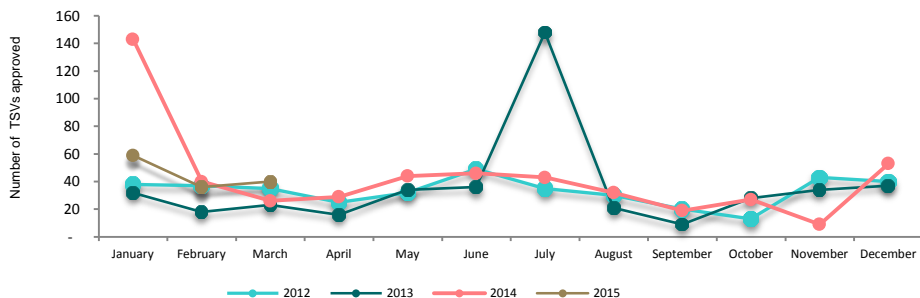
- Despite a significant decline in January, the YTD position for this market is relatively strong, up 11% (65 TSVs).

YTD 2015 sector breakdown of FSVs

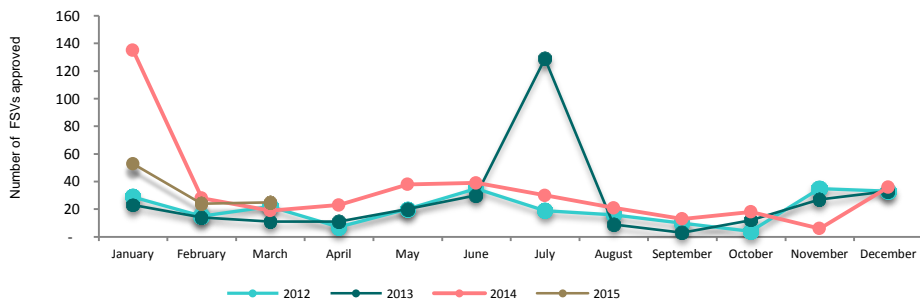


March RSV			March FSV			March TSV		
	8	114%		6	32%		14	54%

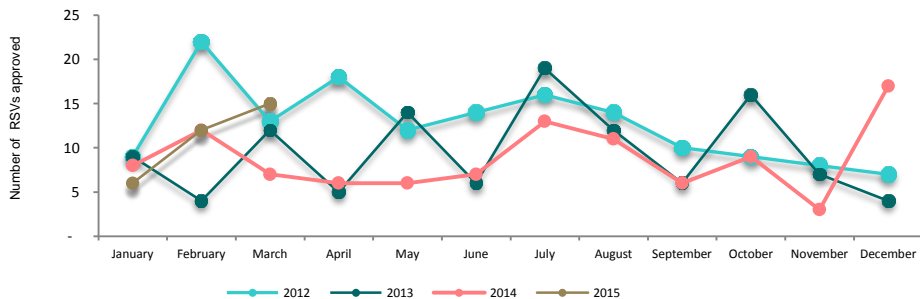
**Chile: Total student visas (TSV) 2012 - 2015**



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






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



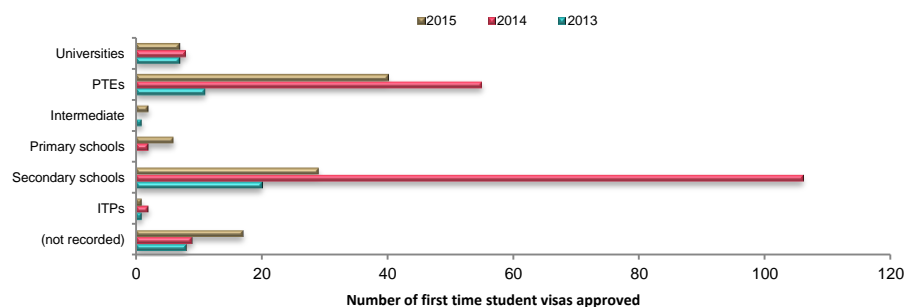
## Takeaways:

- This market has experienced a decline in visa approvals YTD.
- A reduction in Chilean scholarship students has caused a significant decline in secondary school students.

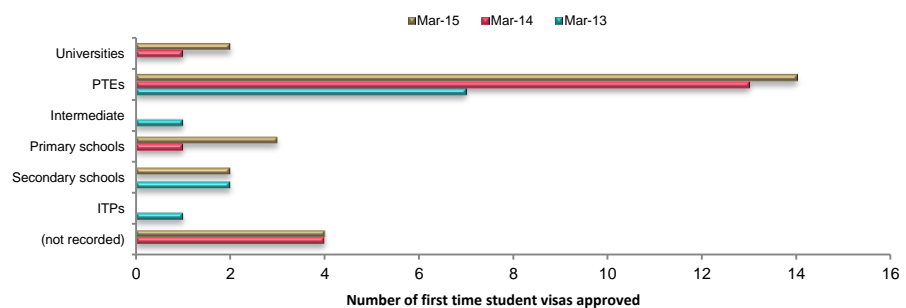
Q1 (January to March)

Q1 RSV			Q1 FSV			Q1 TSV		
	6	22%		-80	-44%		-74	-35%

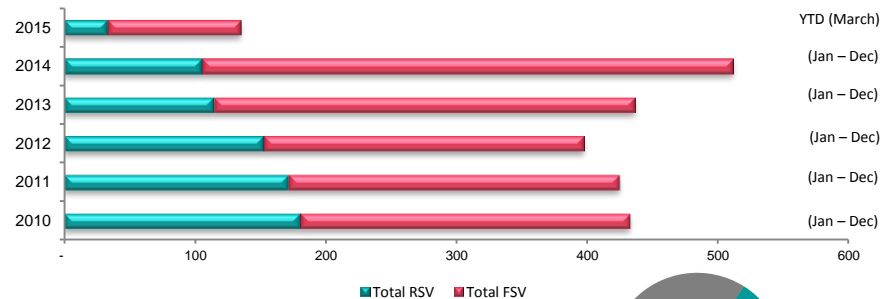
**Chile: First time student visas issued by sector, YTD**



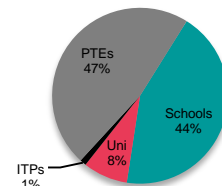
**Chile: First time student visas issued by sector, March**



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

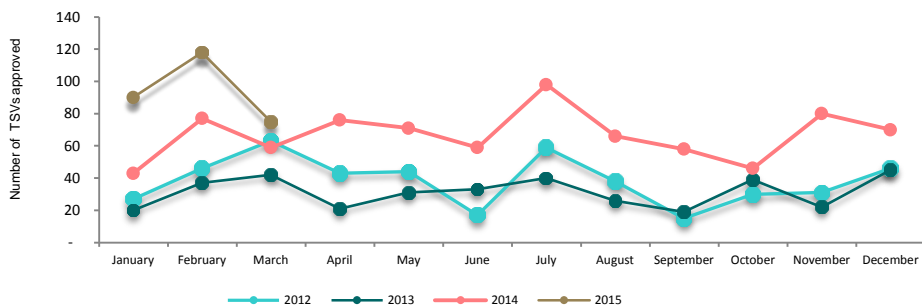


**YTD 2015 sector breakdown of FSVs**

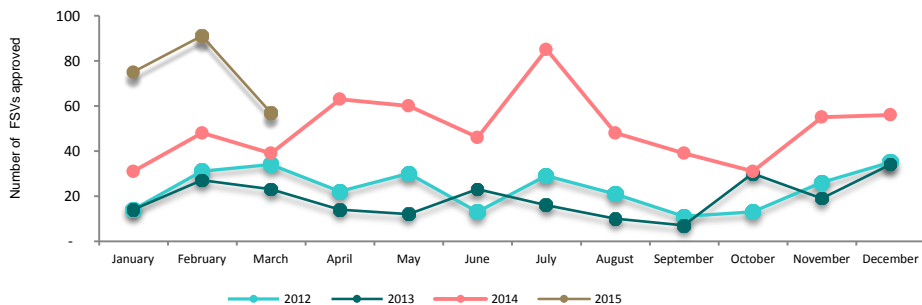


March RSV		March FSV		March TSV	
↓	-2	↑	18	↑	16
	-10%		46%		27%

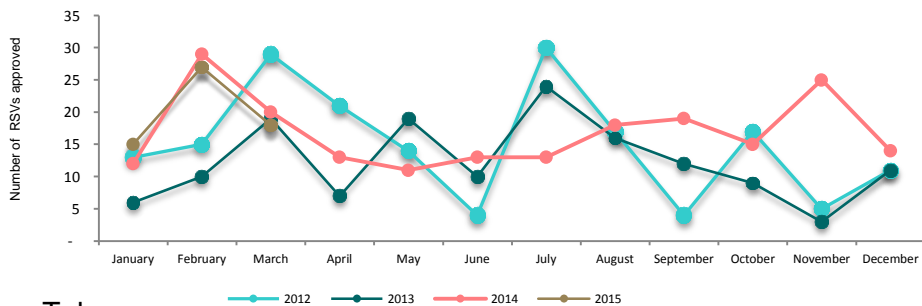
Colombia: Total student visas (TSV) 2012 - 2015



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



Colombia: Renewed student visas (RSV) 2012 - 2015



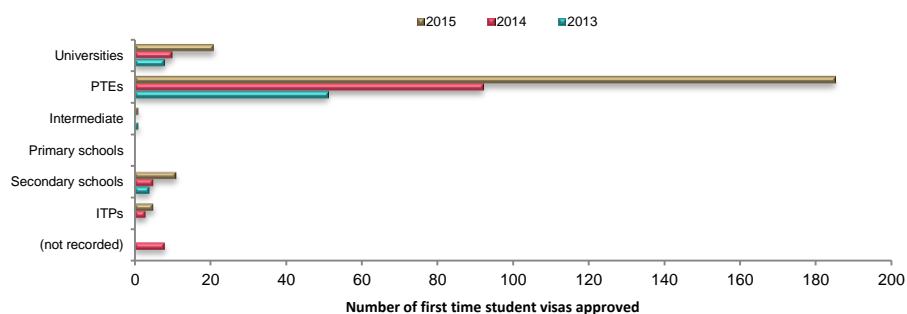
## Takeaways:

- This market has experienced significant growth up 58% (104 TSVs) YTD.
- While the absolute numbers are relatively small, the university, PTE and schools sectors have experienced strong growth.

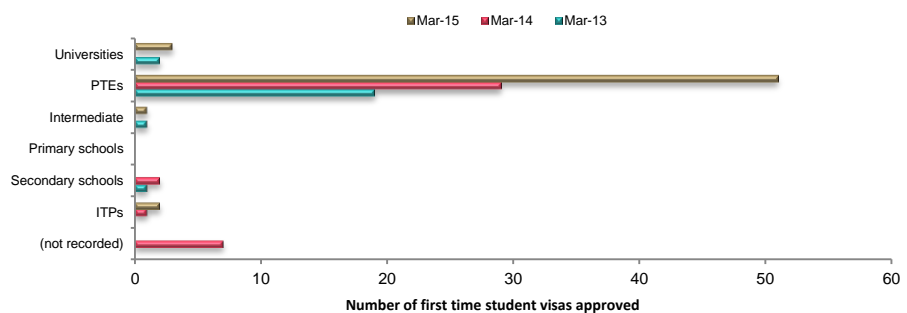
Q1 (January to March)

Q1 RSV		Q1 FSV		Q1 TSV	
↓	-1	↑	105	↑	104
	-2%		89%		58%

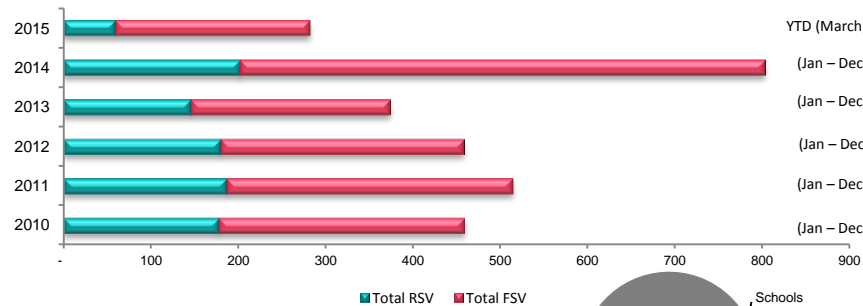
Colombia: First time student visas issued by sector, YTD



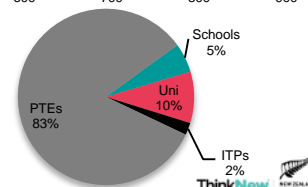
Colombia: First time student visas issued by sector, March



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



YTD 2015 sector breakdown of FSVs

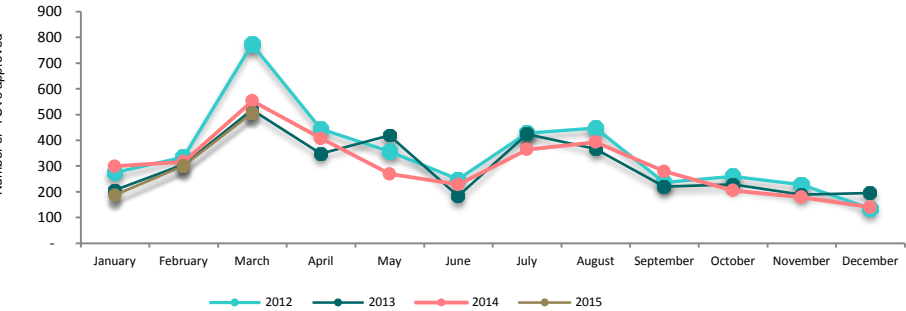




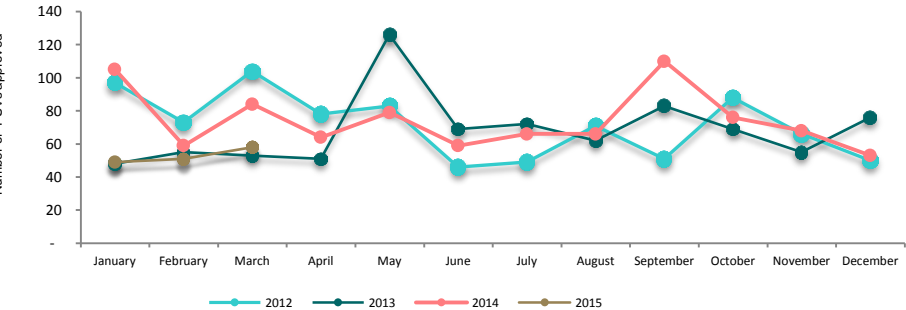
# Middle East:

March RSV		March FSV		March TSV	
↓	-21	↓	-4%	↓	-26
					-31%
					-47
					-8%

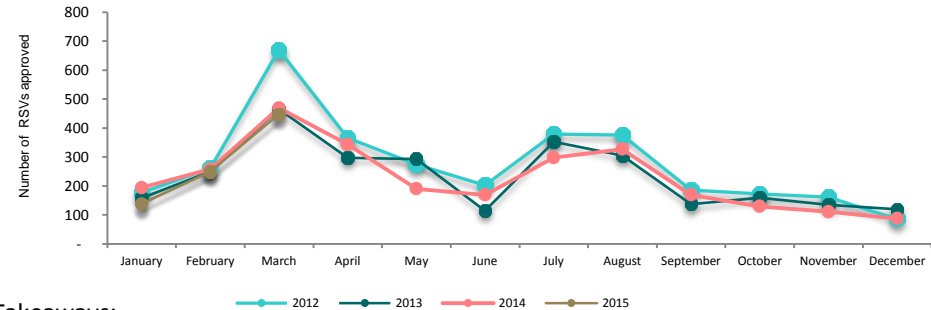
Middle East: Total student visas (TSV) 2012 - 2015



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



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



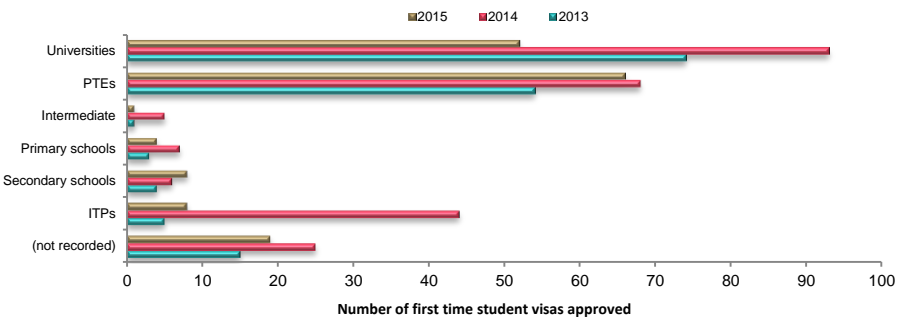
## Takeaways:

- This market continues to experience negative results down 15% (-175)
- The decline is evident in all sectors

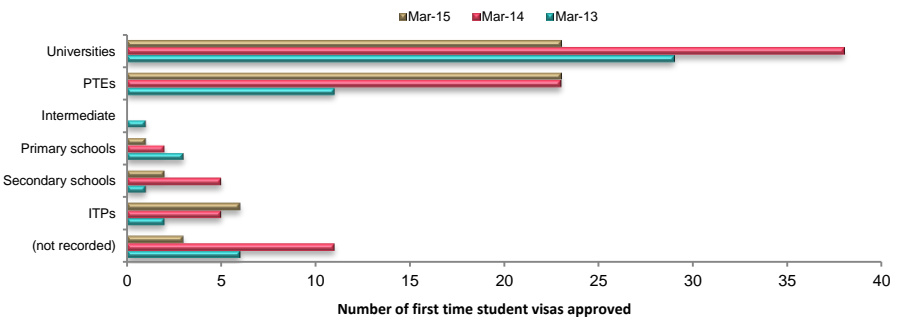
Q1 (January to March)

Q1 RSV		Q1 FSV		Q1 TSV	
↓	-85	↓	-9%	↓	-175
					-15%

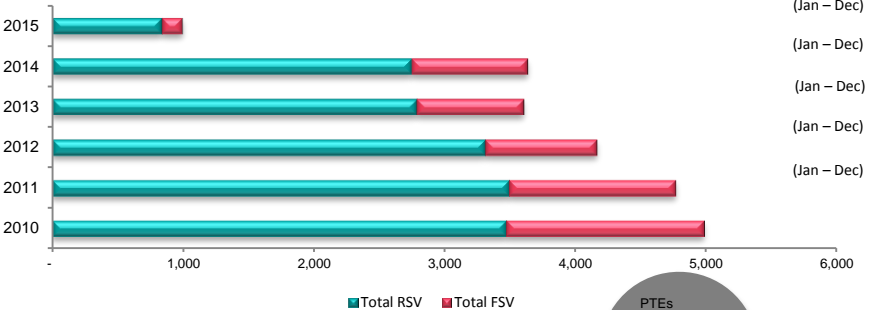
Middle East: First time student visas issued by sector, YTD



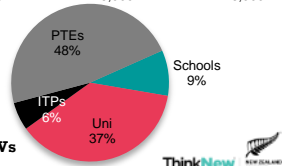
Middle East: First time student visas issued by sector, March



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









YTD 2015 sector  
breakdown of FSVs



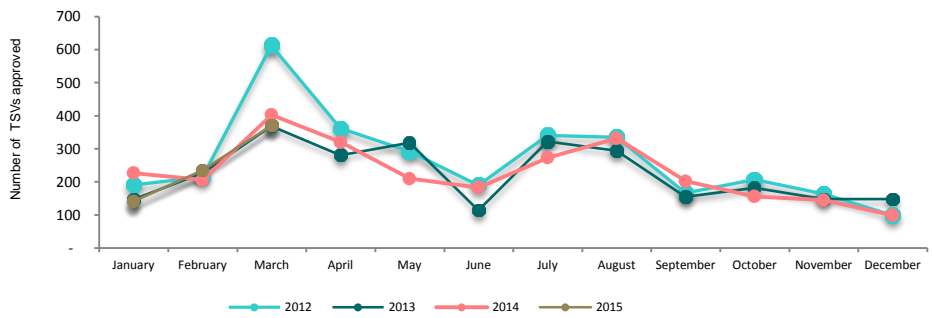
# Saudi Arabia:

Q1 (January to March)

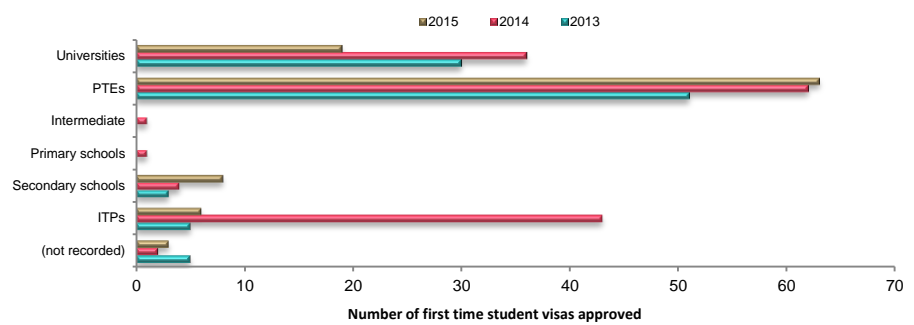
March RSV		March FSV		March TSV	
	-31		-1		-32
	-9%		-3%		-8%

Q1 RSV		Q1 FSV		Q1 TSV	
	-39		-50		-89
	-6%		-34%		-11%

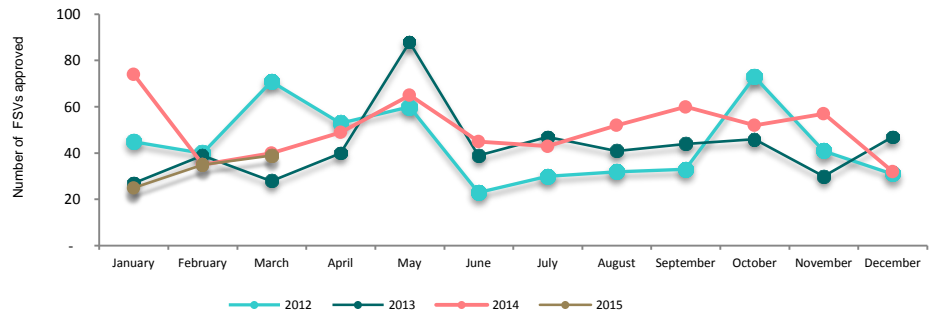
**Saudi Arabia: Total student visas (TSV) 2012 - 2015**



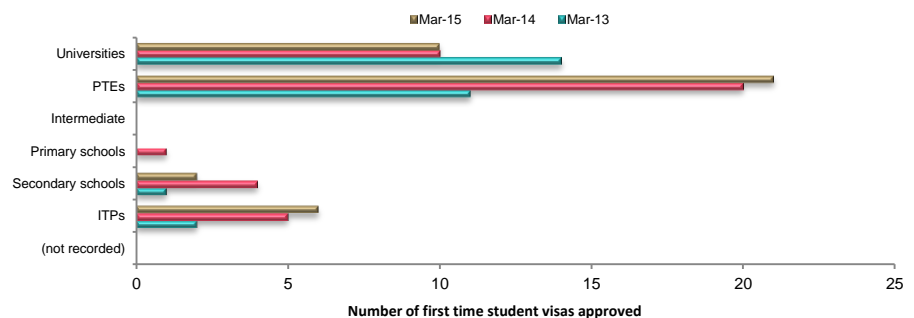
**Saudi Arabia: First time student visas issued by sector, YTD**



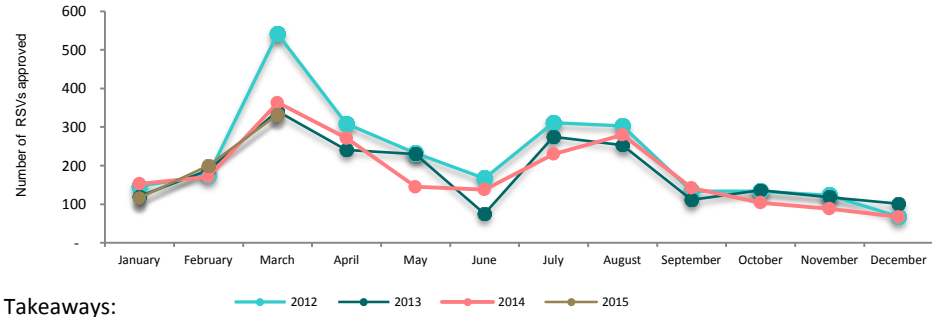
**Saudi Arabia: First time student visas (FSV) 2012 - 2015**



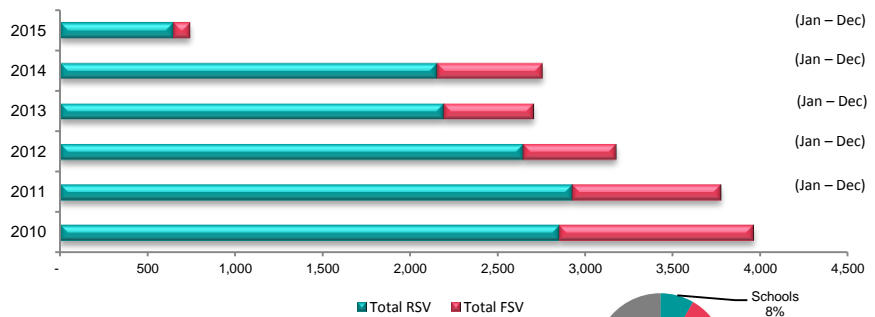
**Saudi Arabia: First time student visas issued by sector, March**



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

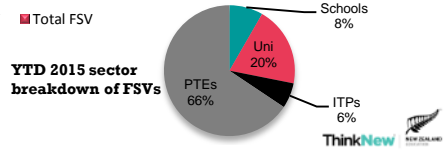


**Saudi Arabia: Cumulative total for RSV vs. FSV 2010 - 2015 YTD (March)**

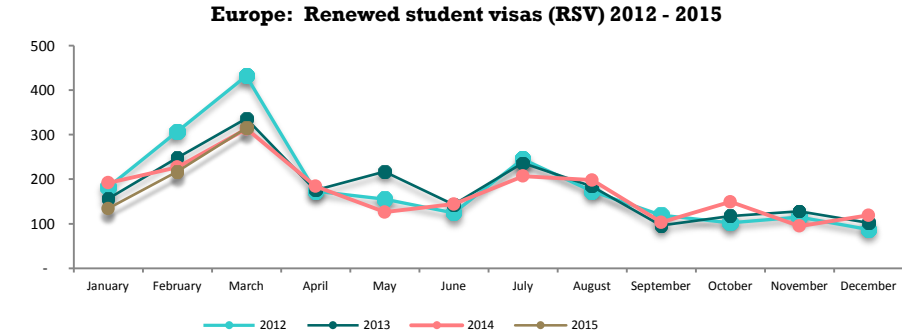
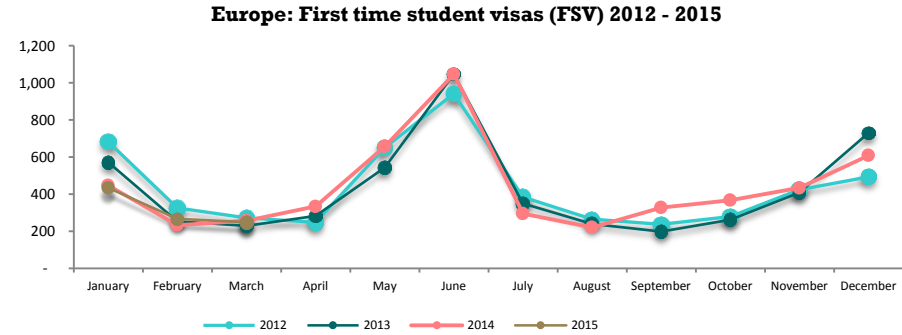
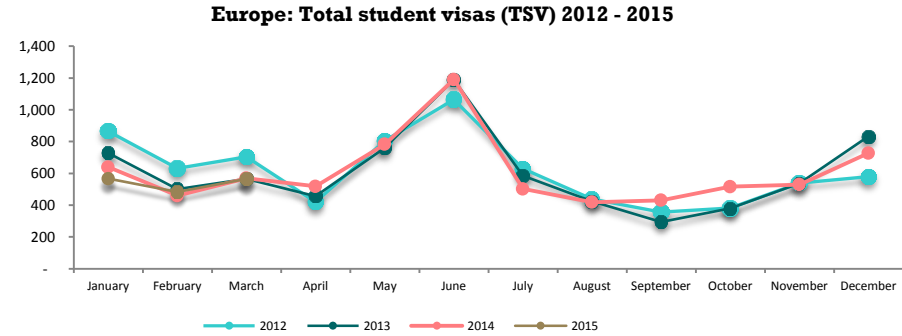


## Takeaways:

- 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, which are still being processed (slightly later this year)



March RSV			March FSV		March TSV			
↑	2	1%	↓	-8	-3%	↓	-6	-1%

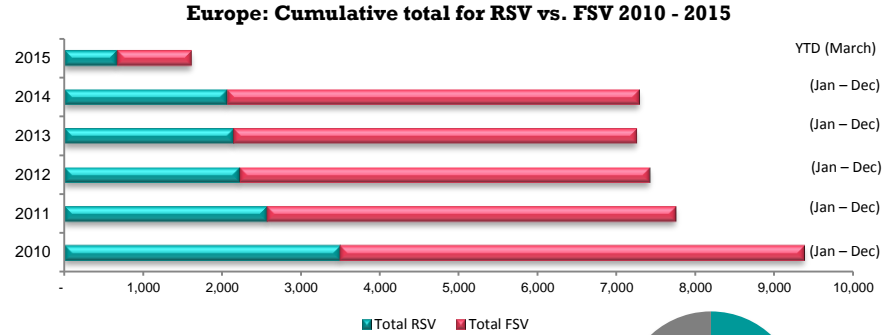
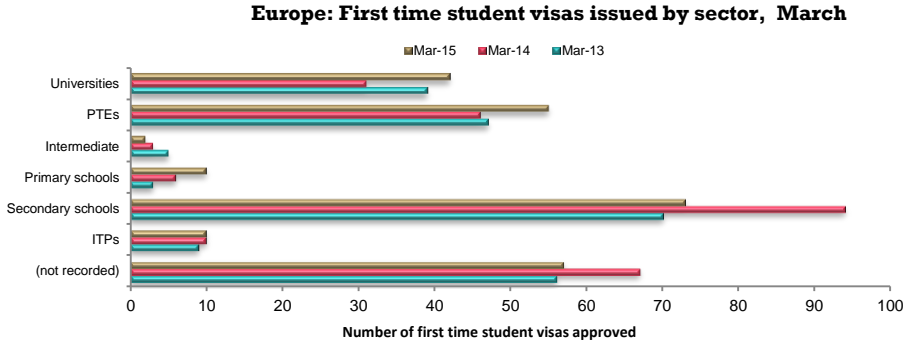
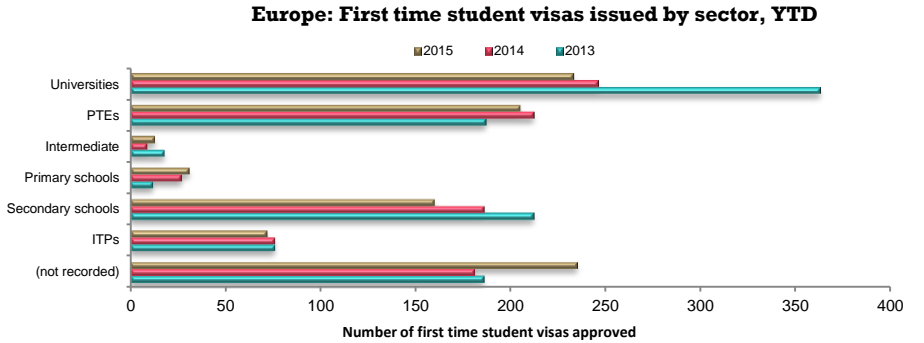


Takeaways:

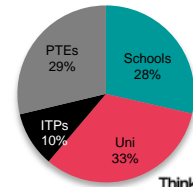
- TSVs continue to decline, down 3%. This is driven by a decline in RSVs.

Q1 (January to March)

Q1 RSV			Q1 FSV			Q1 TSV		
↓	-66	-9%	↑	12	1%	↓	-54	-3%









YTD 2015 sector breakdown of FSVs



# Germany:

Q1 (January to March)

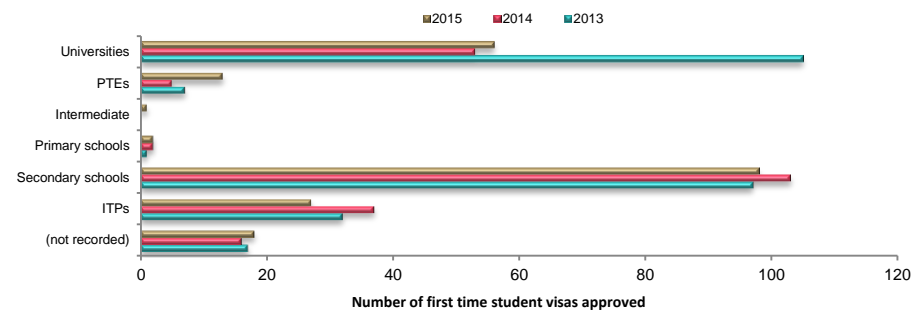
March RSV		March FSV		March TSV	
	-9		-21%		-17
			-10%		-14%

Q1 RSV		Q1 FSV		Q1 TSV	
	-16		-16%		-17
			0%		-5%

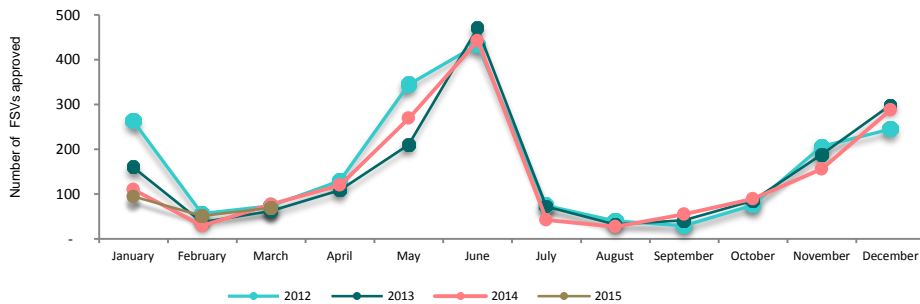
Germany: Total student visas (TSV) 2012 - 2015



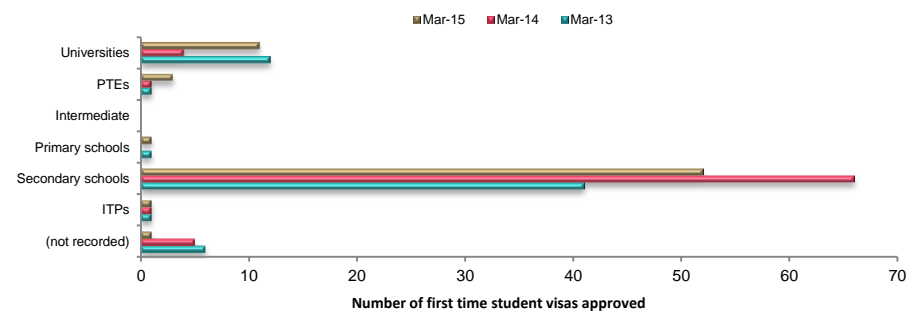
Germany: First time student visas issued by sector, YTD



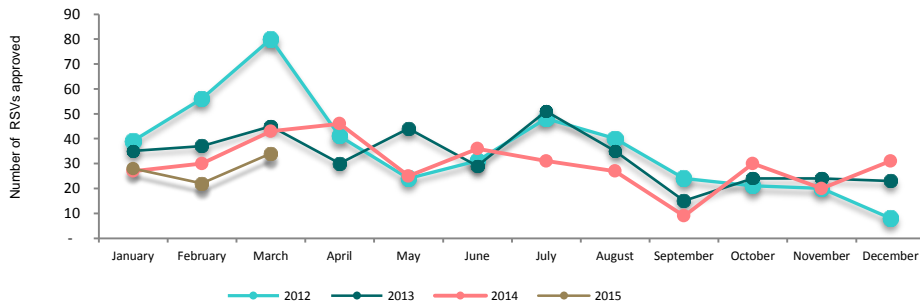
Germany: First time student visas (FSV) 2012 - 2015



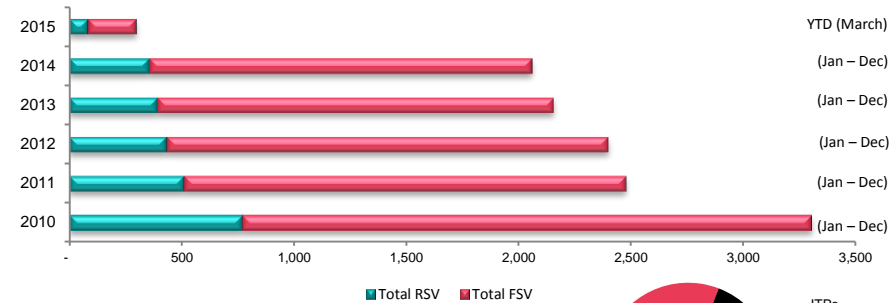
Germany: First time student visas issued by sector, March



Germany: Renewed student visas (RSV) 2012 - 2015



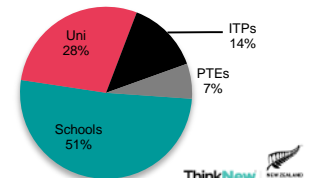
Germany: Cumulative total for RSV vs. FSV 2010 - 2015



## Takeaways:

- This market continues to decline
- Though from a small base, the university sector experienced growth in March.

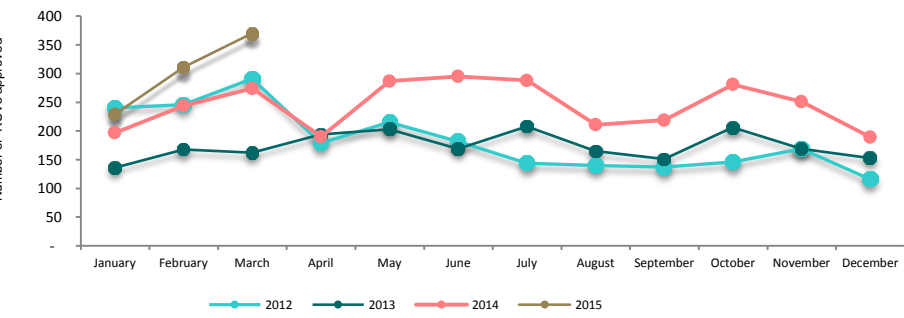
YTD 2015 sector breakdown of FSVs



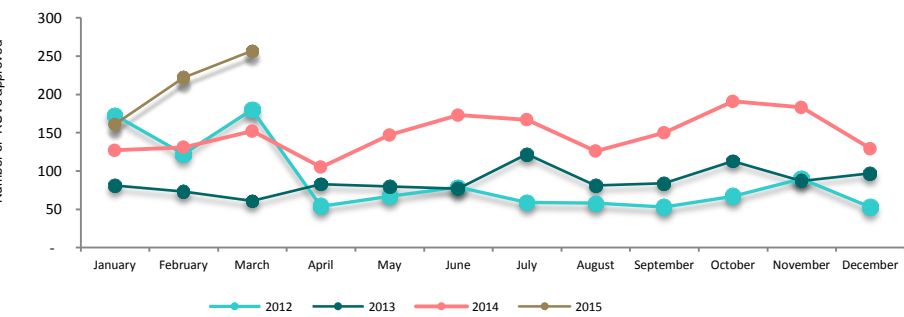
# Philippines:

March RSV		March FSV		March TSV	
↓ -9	-7%	↑ 105	69%	↑ 96	35%

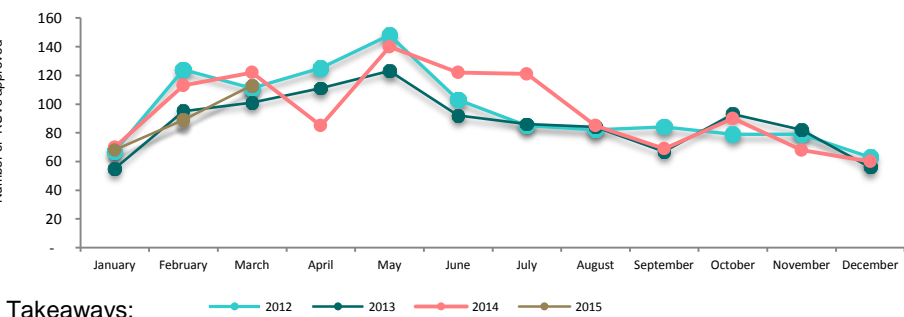
Philippines: Total student visas (TSV) 2012 - 2015



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



Philippines: Renewed student visas (RSV) 2012 - 2015

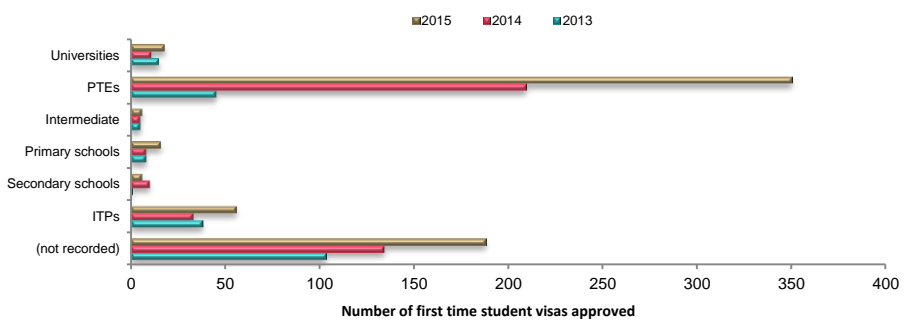


- Takeaways:**
- This market has experienced significant growth in 2014 and has started 2015 with a similar trend.
  - The growth is driven by the PTE, ITP, and university sector
  - RSVs are tracking down

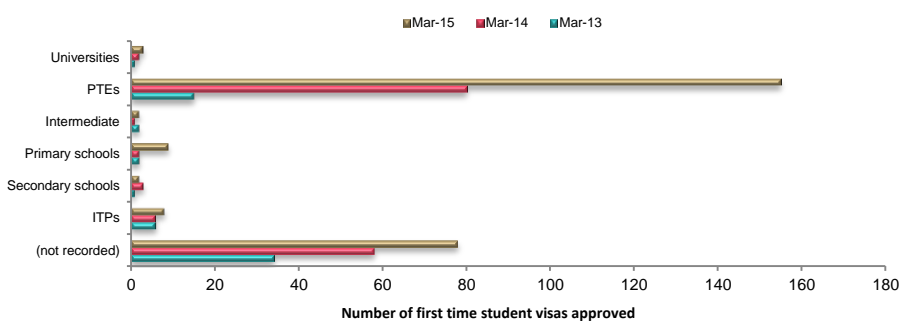
Q1 (January to March)

Q1 RSV		Q1 FSV		Q1 TSV	
↓ -35	-11%	↑ 230	56%	↑ 195	27%

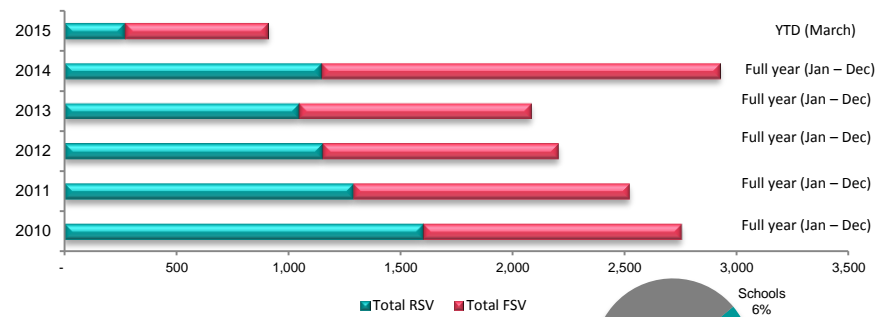
Philippines: First time student visas issued by sector, YTD



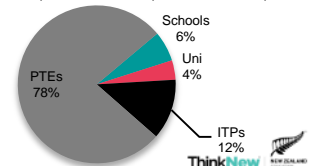
Philippines: First time student visas issued by sector, March



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



YTD 2015 sector breakdown of FSVs



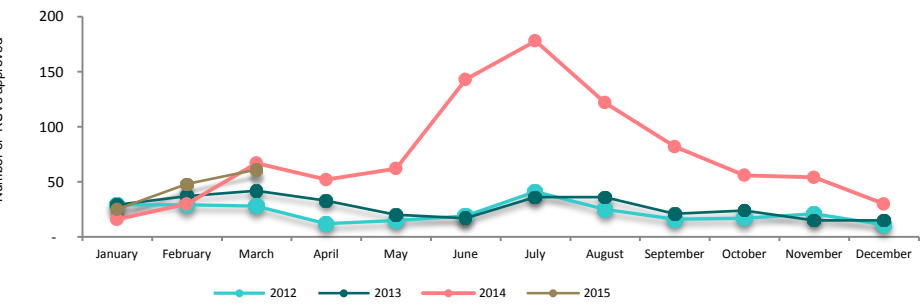
# Nepal

Q1 (January to March)

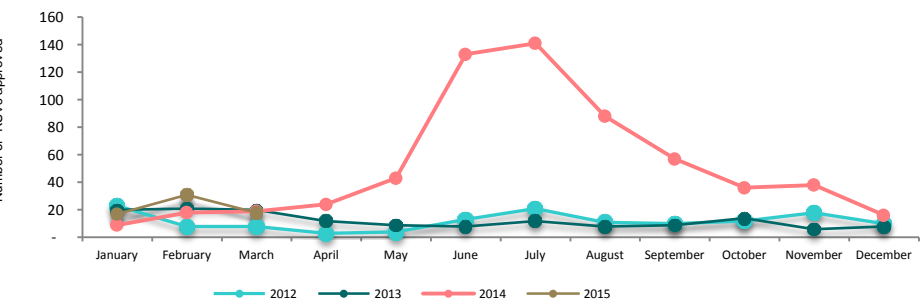
March RSV		March FSV		March TSV	
↓	-5	↓	-1	↓	-6
	-10%		-5%		-9%

Q1 RSV		Q1 FSV		Q1 TSV	
↑	1	↑	20	↑	21
	1%		43%		19%

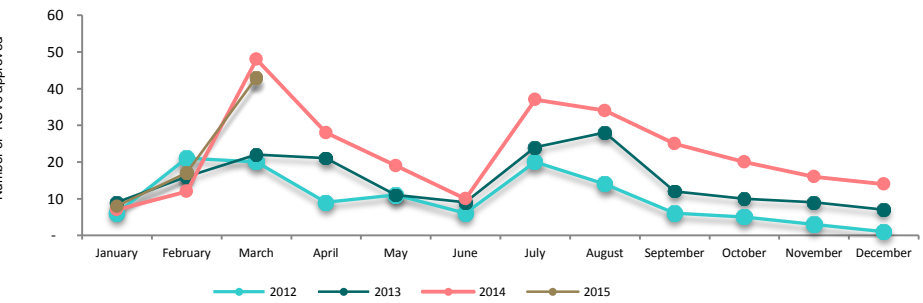
Overall: Total student visas (TSV) 2012 - 2015



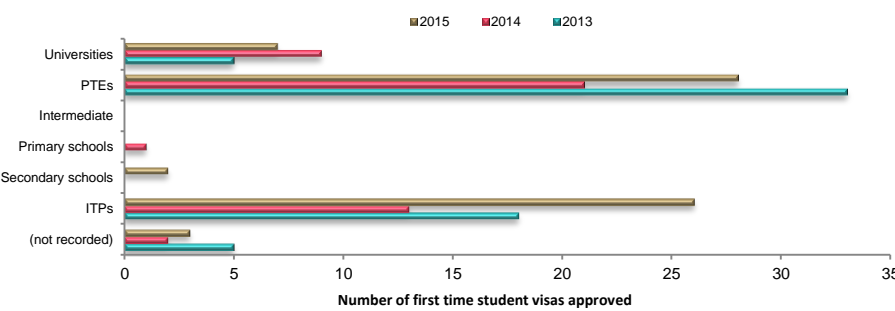
Nepal: First time student visas (FSV) 2012 - 2015



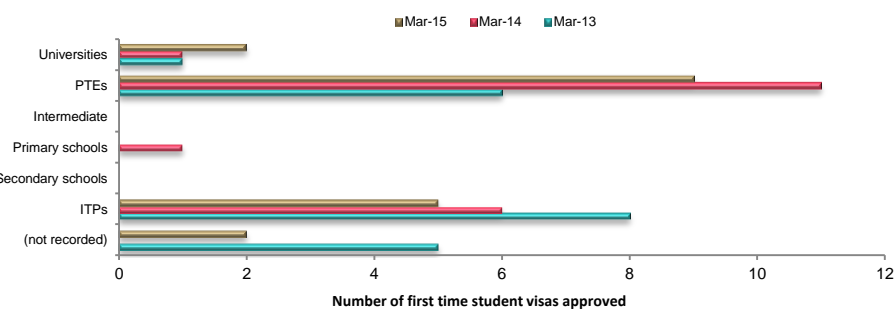
Nepal: Renewed student visas (RSV) 2012 - 2015



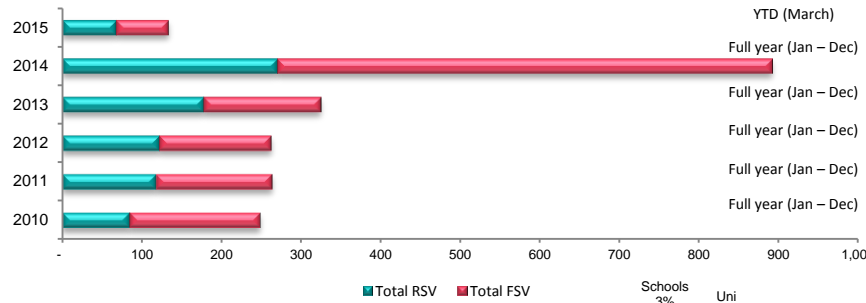
Nepal: First time student visas issued by sector, YTD



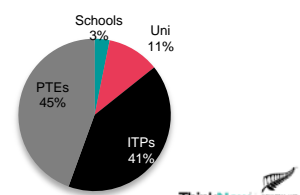
Nepal: First time student visas issued by sector, March



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



YTD 2015 sector breakdown of FSVs



Takeaways:

- This market grew significantly in 2014, which has continued into 2015.



# **Student Visa Dashboard First Quarter 2015**

**Overall First Time Visas (FSVs):**

**Sector overview**

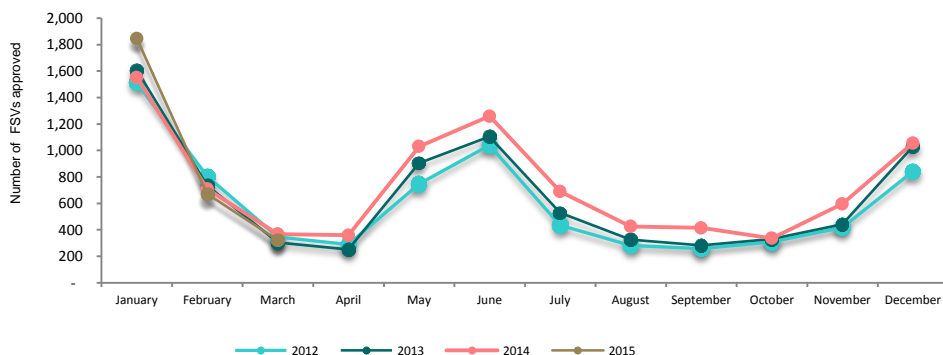




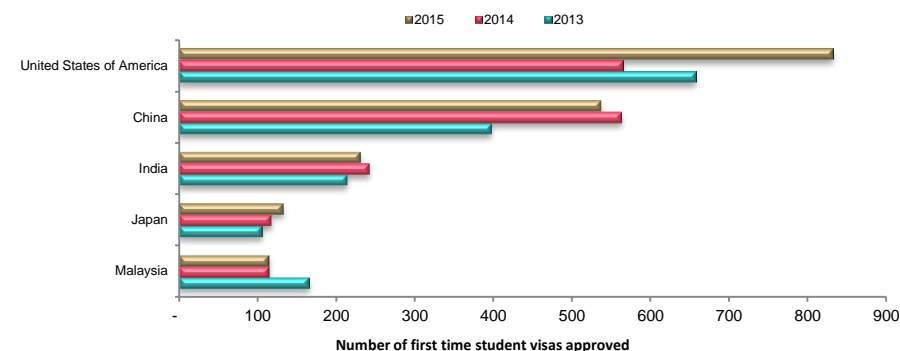
# University:

March FSV		Q1 FSV	
↓ -45	-12%	↑ 215	8%

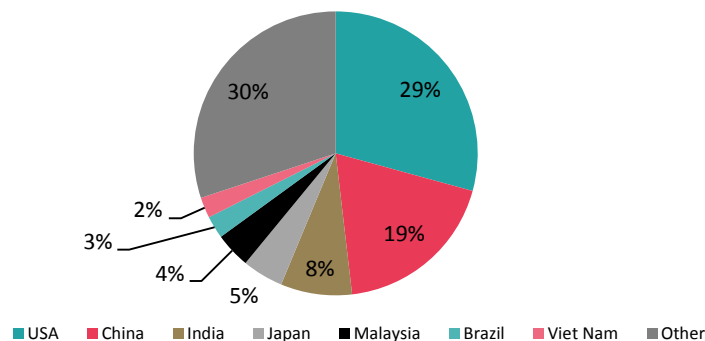
University: Total first time student visas (FSV) 2012 - 2015



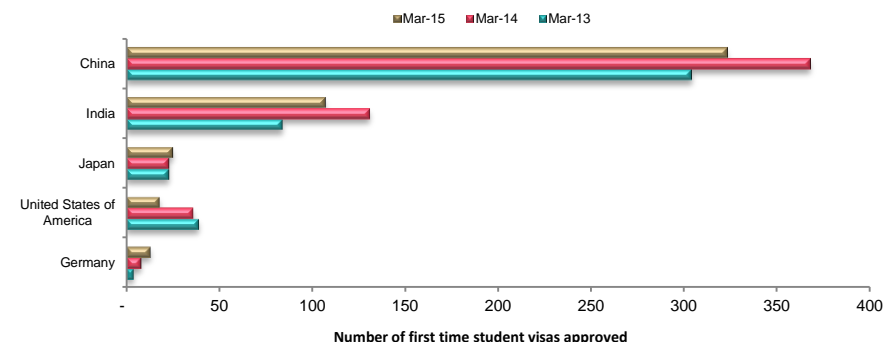
University: First time student visas issued by country, YTD



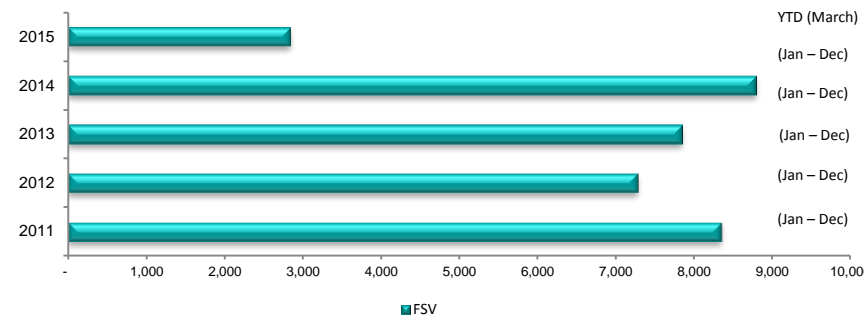
YTD 2015 country breakdown of FSVs



University: First time student visas issued, March



University: Cumulative total FSV 2011 - 2015



## Takeaways:

- The university sector has started the 2015 year strongly, up 8% (215).
- March saw a sharp decline down 12% (45)
- This growth was driven by USA, up 47% (268) YTD.

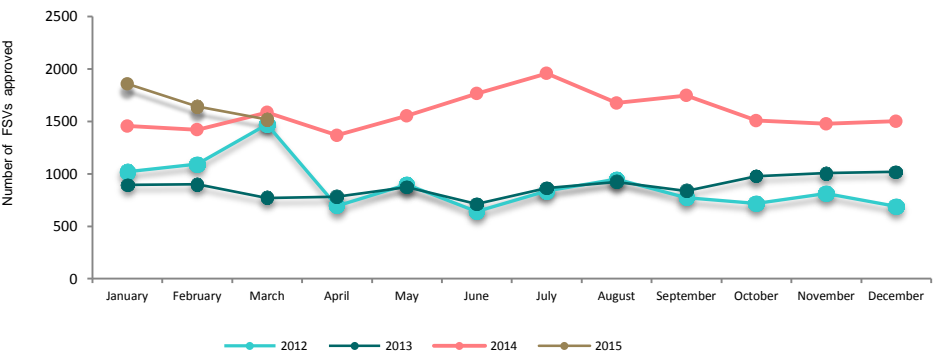
# Private Training Establishments (PTE):



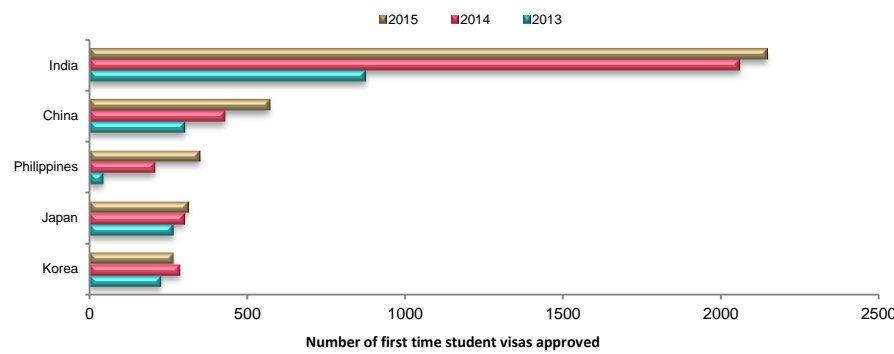
Q1 (January to March)

March FSV		Q1 FSV	
↓ -66	-4%	↑ 559	13%

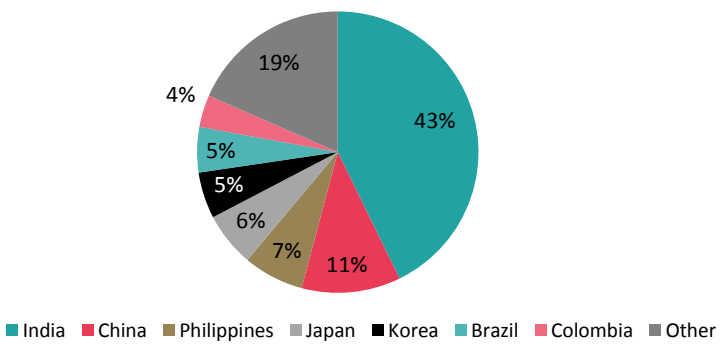
PTEs: Total first time student visas (FSV) 2012 - 2015



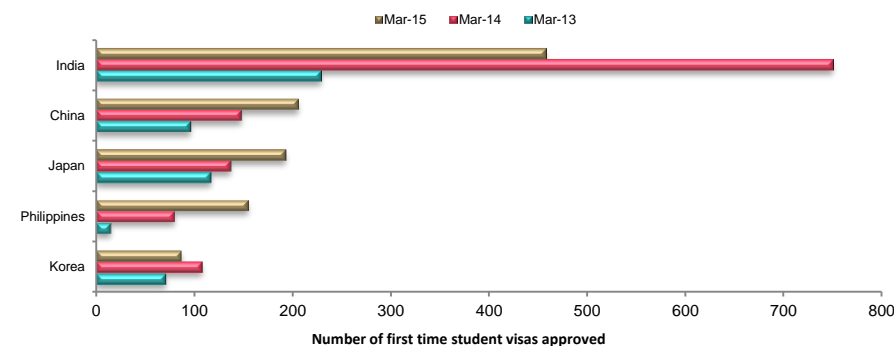
PTEs: First time student visas issued by country, YTD



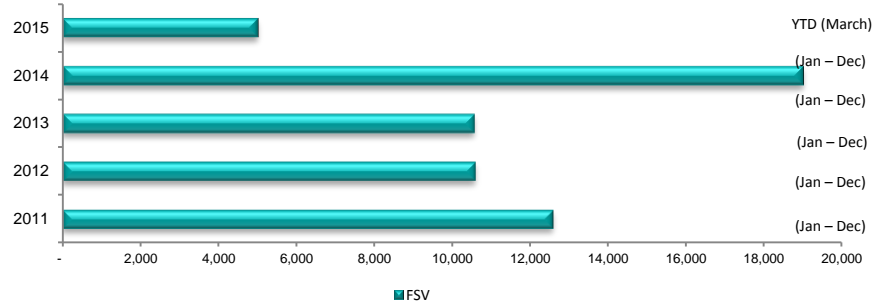
YTD 2015 country breakdown of FSVs



PTEs: First time student visas issued, March



PTEs: Cumulative total FSV 2011 - 2015

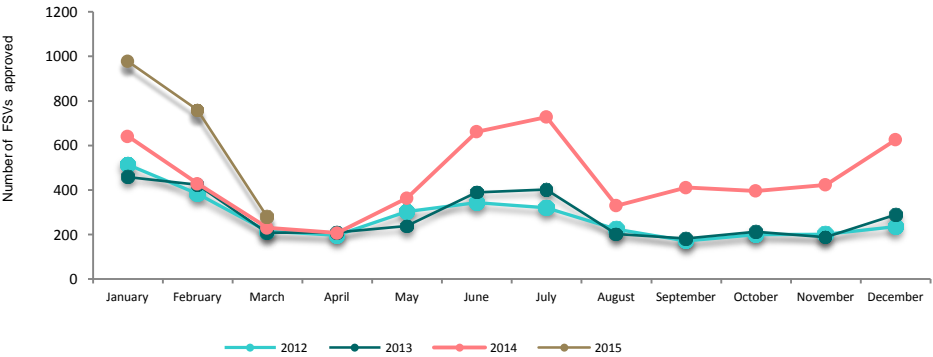


- Takeaways:
- Following a strong finish to 2014, 2015 is tracking strongly up 13% (559).
  - March was the first month since September 2013 where there was a decline.
  - The decline was primarily driven by a decline in Indian students.

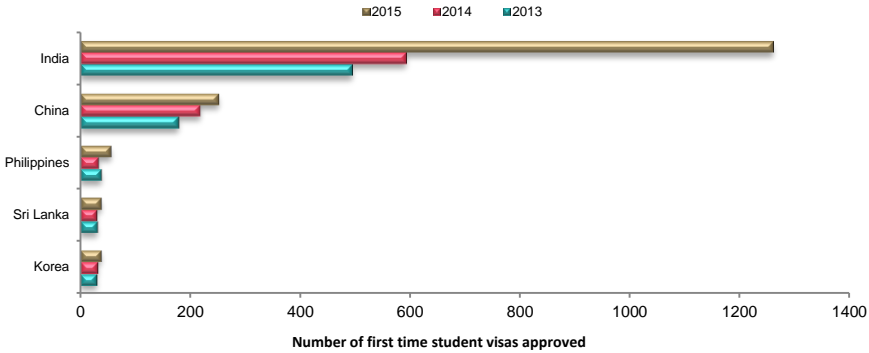
# Institutes of Technology and Polytechnics (ITPs):

March FSV		Q1 FSV	
↑ 51	22%	↑ 721	56%

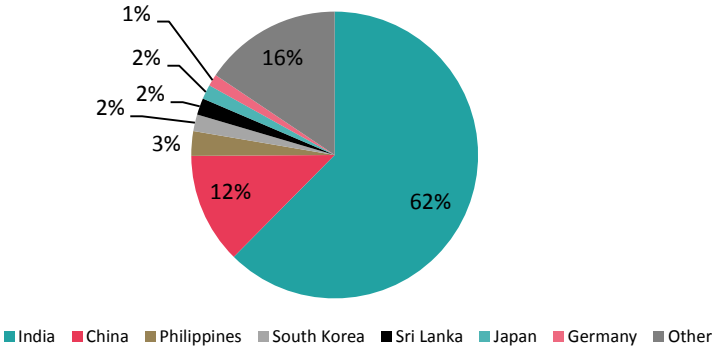
ITPs: Total first time student visas (FSV) 2012 - 2015



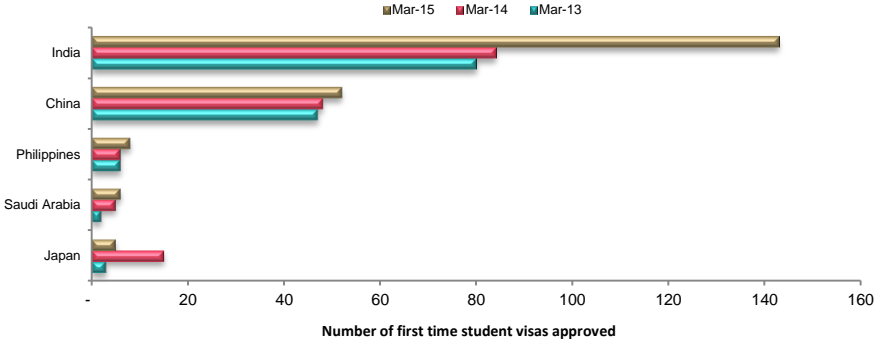
ITPs: First time student visas issued by country, YTD



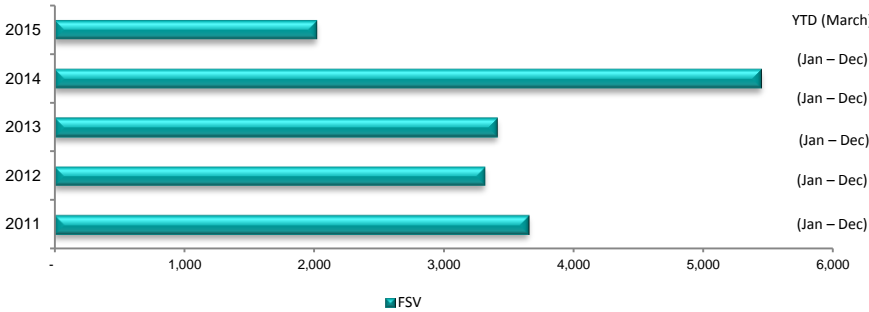
YTD 2015 country breakdown of FSVs



ITPs: First time student visas issued, March





ITPs: Cumulative total FSV 2011 - 2015



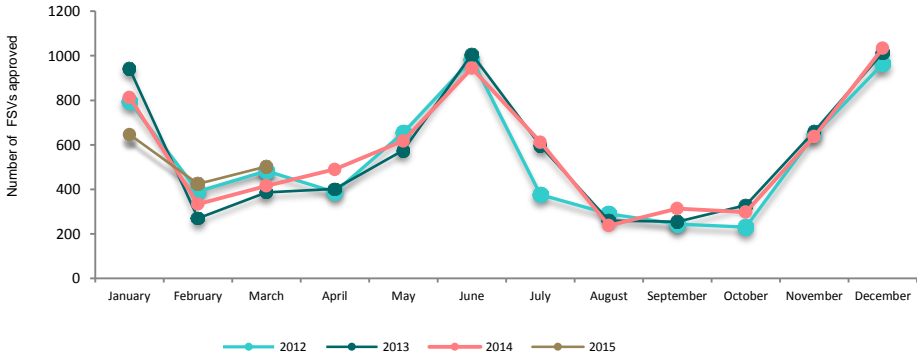
- Takeaways:
- After experiencing a strong 2014, the ITP sector has continued to see strong growth, up 56% (721) YTD.
  - This growth was driven by the Indian market which represents 62% of all FSVs approved YTD.

# Secondary schools:

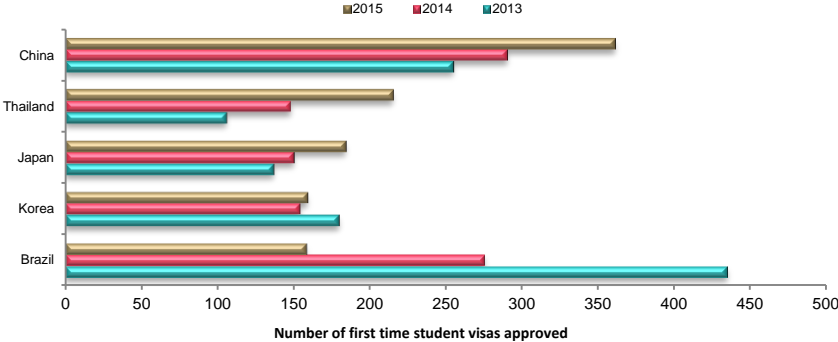
Q1 (January to March)

March FSV		Q1 FSV	
	87	21%	 12
			1%

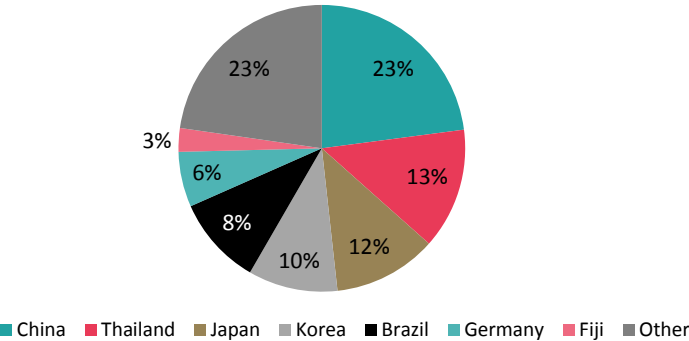
Secondary schools: Total first time student visas (FSV) 2012 - 2015



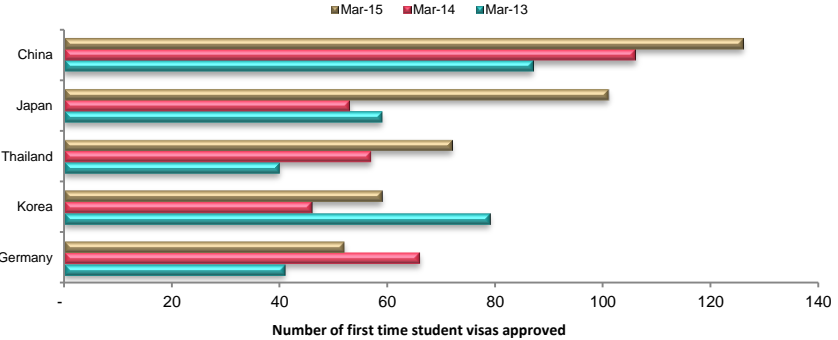
Secondary schools: First time student visas issued by country, YTD



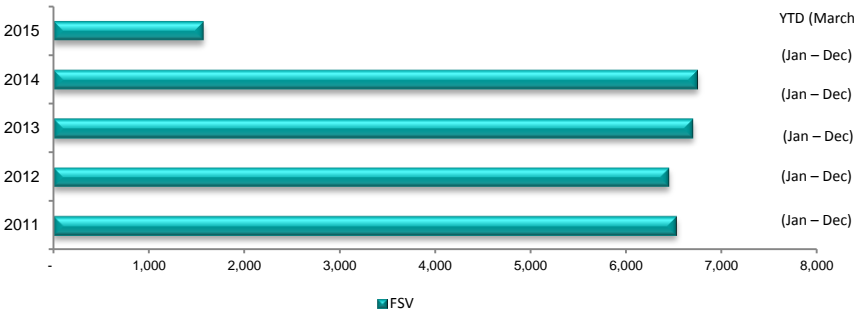
YTD 2015 country breakdown of FSVs



Secondary schools: First time student visas issued, March





Secondary schools: Cumulative total FSV 2011 - 2015



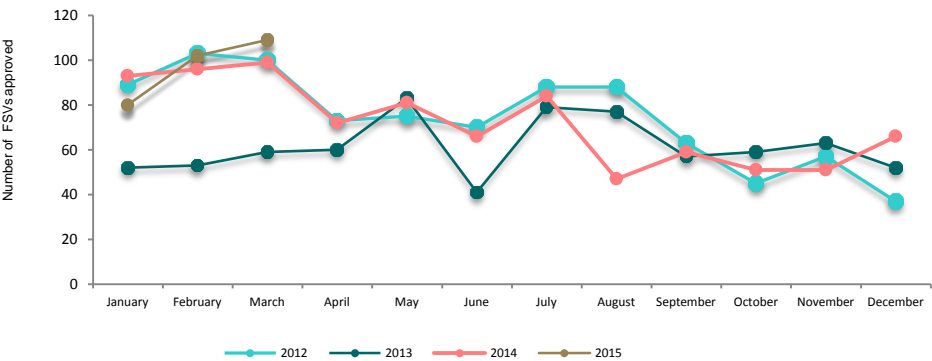
## Takeaways:

- This sector has started the 2015 year in a negative position when compared to 2014, however a strong March has levelled the YTD position.
- March approvals have grown by 27% (91).
- Chinese, Japanese and Thai students drove the growth in March.

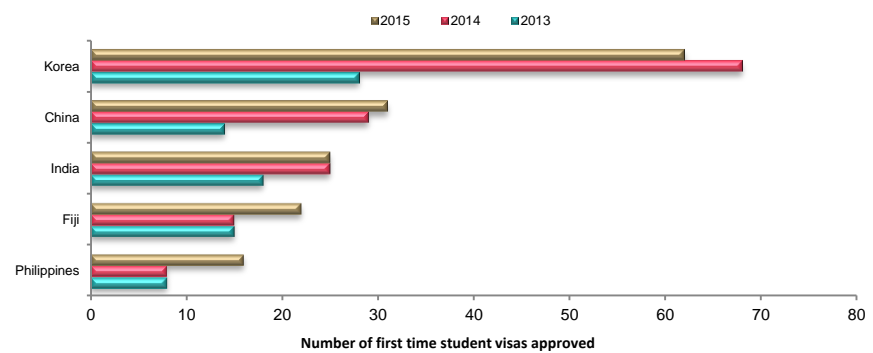
# Primary schools:

March FSV		Q1 FSV	
	10	10%	 3

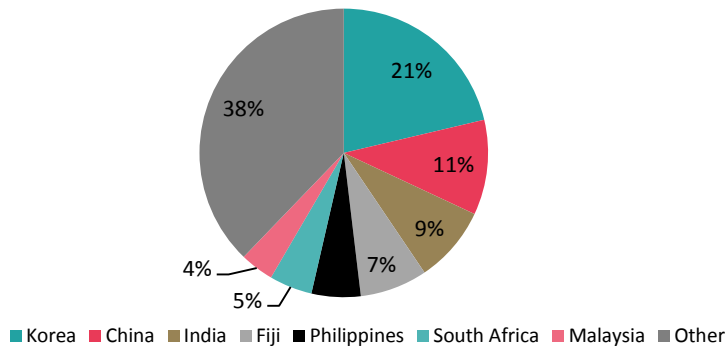
Primary schools: Total first time student visas (FSV) 2012 - 2015



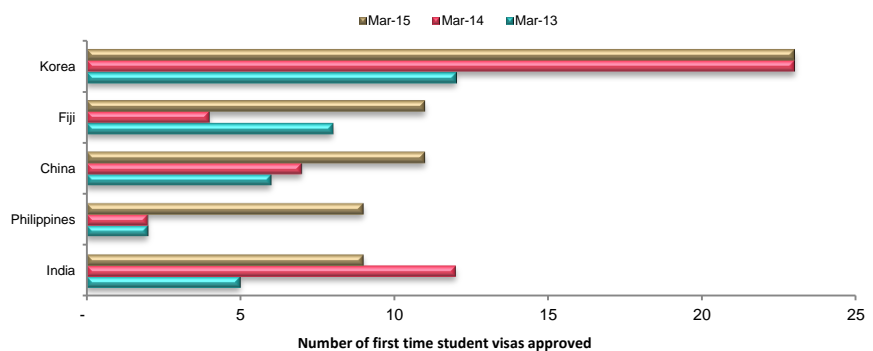
Primary schools: First time student visas issued by country, YTD



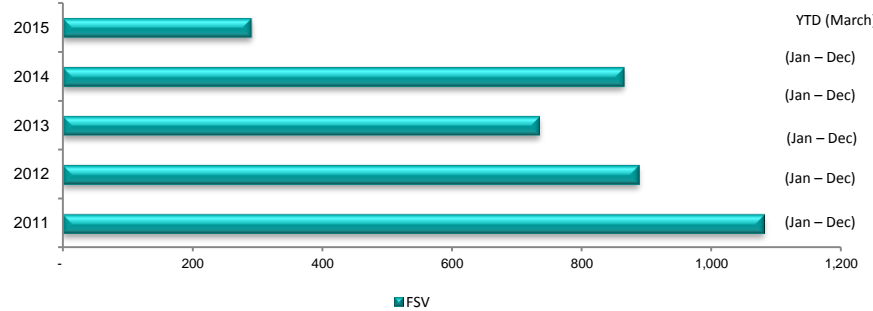
YTD 2015 country breakdown of FSVs



Primary schools: First time student visas issued, March



Primary schools: Cumulative total FSV 2011 - 2015



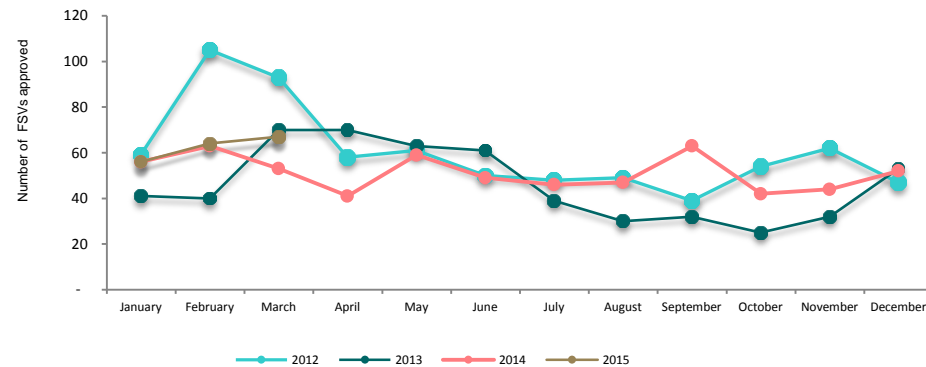
Takeaways:

- The primary school sector is tracking flat, up 1% (3)

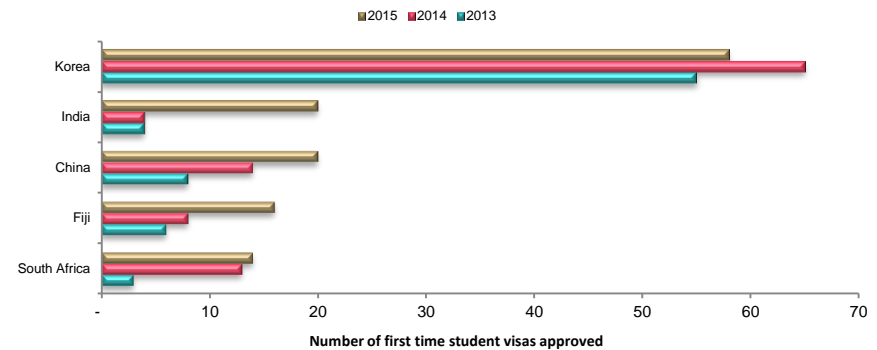
# Intermediate schools:

FSV March		Q1 FSV	
↑ 14	26%	↑ 15	9%

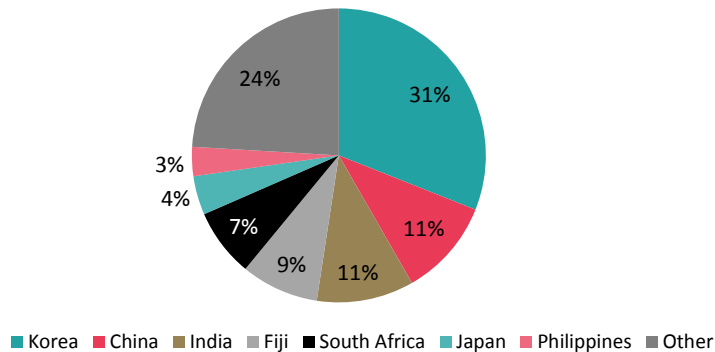
**Intermediate: Total first time student visas (FSV) 2012 - 2015**



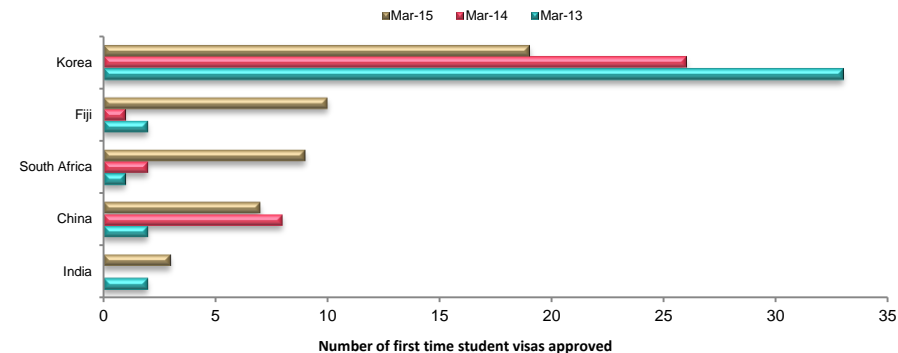
**Intermediate: First time student visas issued by country, YTD**



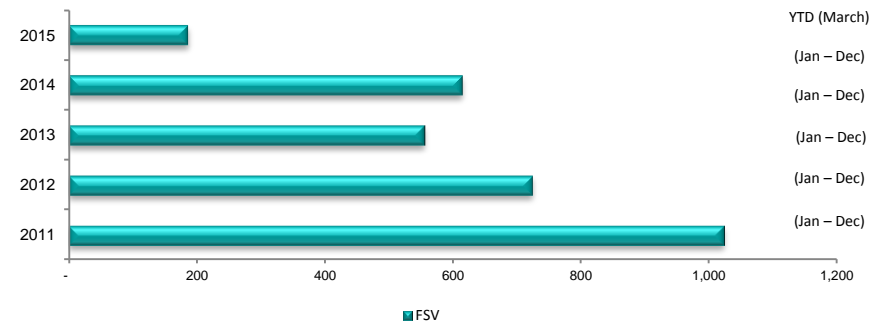
**YTD 2015 country breakdown of FSVs**



**Intermediate: First time student visas issued, March**



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



## Takeaways:

- This sector saw a strong March up 26% (14).
- The majority of approvals YTD came from Korea, India and China.