

Student Visa Dashboard September 2015

Overall:

Market and sector overview



Introduction



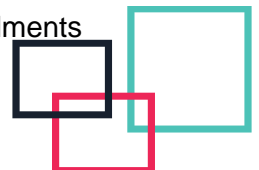
- *The following dashboard was developed by Education New Zealand and is based on Immigration New Zealand (INZ) data on issued student visas. This data source is the most immediate/instantaneous data available on the international education sector, as there is only a one month lag between student visas approved and INZ publishing the data. Student visa data is a strong indicator of whether students are entering, remaining or leaving New Zealand, which can be used as a predictor for future enrolment trends.*
- *Student visa trends allow us to analyse two key indicators: 1) growth of new students and 2) retention of students.*
- *We use first time student visas as an indicator of growth as it represents new students and the pipeline of students entering New Zealand.*
- *Total student visas gives us an overview of all student visas (i.e. first time student visas and students re-issuing their visas).*
- *We can analyse the retention of students by subtracting first-time student visas from total student visas.*



Caveats and notes



- Student visas vs. visitor visas:
 - Total student visas (TSV), first time student visas (FSV), and renewed student visas (RSV) only capture students who enter New Zealand with a student visa. These students are mostly those who are planning to study for more than three months.
 - Students who undertake a course less than three months are not required to enter on a student visa. Students who do choose to enter on a visitor visa (usually from visa-free nationalities) are not captured in this dashboard.
 - This will impact the Private Training Establishments (including English Language Schools) numbers.
- Student visas vs. enrolments:
 - There is potential delay of up to three months between students having their visas approved and actual entry into New Zealand, therefore the figures shown here may not necessarily represent the actual number of students currently in New Zealand.
- Methodology:
 - The following Dashboard's methodology has been revised to exclude dependants, applicants under Section 61, and Variation of Conditions. Dashboards prior to May 2015 include approvals from "all" applicants, including dependants.
- Work in progress:
 - ENZ is currently working on:
 - Understanding the true demand of student visas – i.e. TSV applications vs. TSVs approved
 - Understanding the correlation between ENZ activity and policy changes on FSV trends
 - Understanding the impact of RSV on overall trends
 - Further work is being undertaken to understand a relatively large number of "not recorded" entries for FSVs at the provider level
 - Further analysis is being undertaken on understanding the correlation between student visas and enrolments



How to read the dashboard

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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

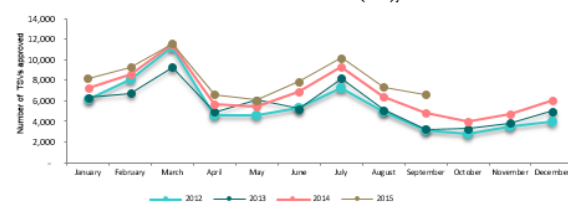
These graphs show a monthly trend of actual visa numbers from 2011 – 2015.

Key trends or interesting trends to consider

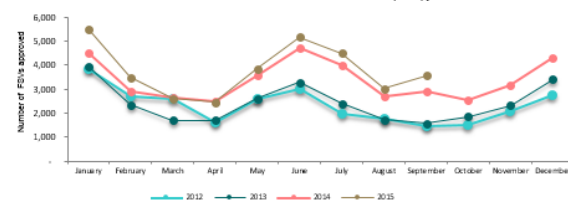
Overall:

September RSV	September FSV	September TSV
↑ 1,122 58%	↑ 668 23%	↑ 1,790 37%

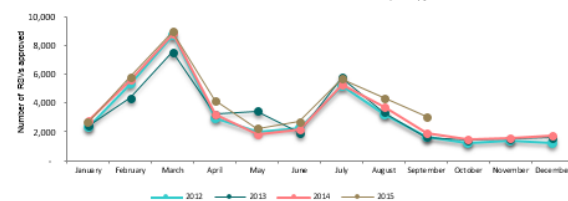
Overall: Total student visas (TSV), 2012 - 2015



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



Overall: Renewed student visas (RSV), 2012 - 2015



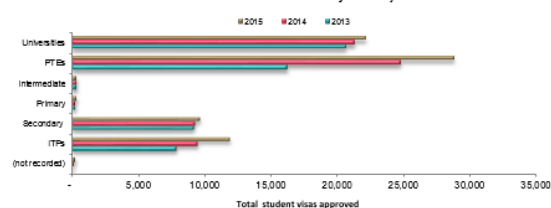
Takeaways:

- TSVs, FSVs, and RSVs are all showing strong growth YTD (up 12%).
- September has been particularly positive, with FSVs up 23% and RSVs up 58%.
- The majority of YTD growth has been driven by PTEs and ITPs, together contributing an additional 6,555 TSVs.

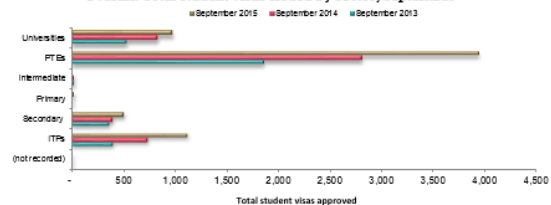
YTD (January to September)

YTD RSV	YTD FSV	YTD TSV
↑ 4,276 12%	↑ 3,646 12%	↑ 7,922 12%

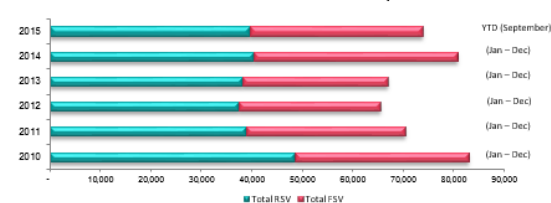
Overall: Total student visas issued by sector, YTD



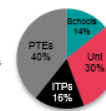
Overall: Total student visas issued by sector, September



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



YTD 2015 sector breakdown of TSVs



This pie graph represents the sector distribution of TSVs 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 TSV numbers.

Shows the monthly sector performance of actual TSV numbers.

Shows the calendar year results for FSVs + 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 12% (7,932) and first time student visas (FSV) are up 12% (3,646). Returning student visas are up 12% (4,286).
- YTD growth in TSVs has been driven by India, China, the Philippines, the USA, and Colombia.
- The ITPs, PTEs, and universities have experienced the strongest YTD growth in FSVs, up 45% (1,792), 8% (1,203), and 8% (514).

September

- September saw 37% (1,790) TSV growth and 23% (668) FSV growth on 2014.
- September TSV growth was driven by India, China, the Philippines, Nepal, and Bangladesh.
- All sectors except intermediate schools experienced growth in TSVs.

Increases

TSVs for September	Change	% change
India	732	49%
China	335	22%
Philippines	271	205%
Nepal	72	104%
Bangladesh	60	600%

FSVs for September	Change	% change
Philippines	277	254%
India	228	21%
Brazil	53	98%
Sri Lanka	47	313%
China	37	5%

Sector TSVs for September	Change	% change
PTEs	1,141	41%
ITPs	394	54%
Universities	139	17%
Secondary	105	26%
Primary	18	129%
Intermediate	-4	-18%

Decreases

Oman	-27	-79%
Saudi Arabia	-24	-14%
Great Britain	-18	-50%
France	-10	-21%
Switzerland	-10	-48%

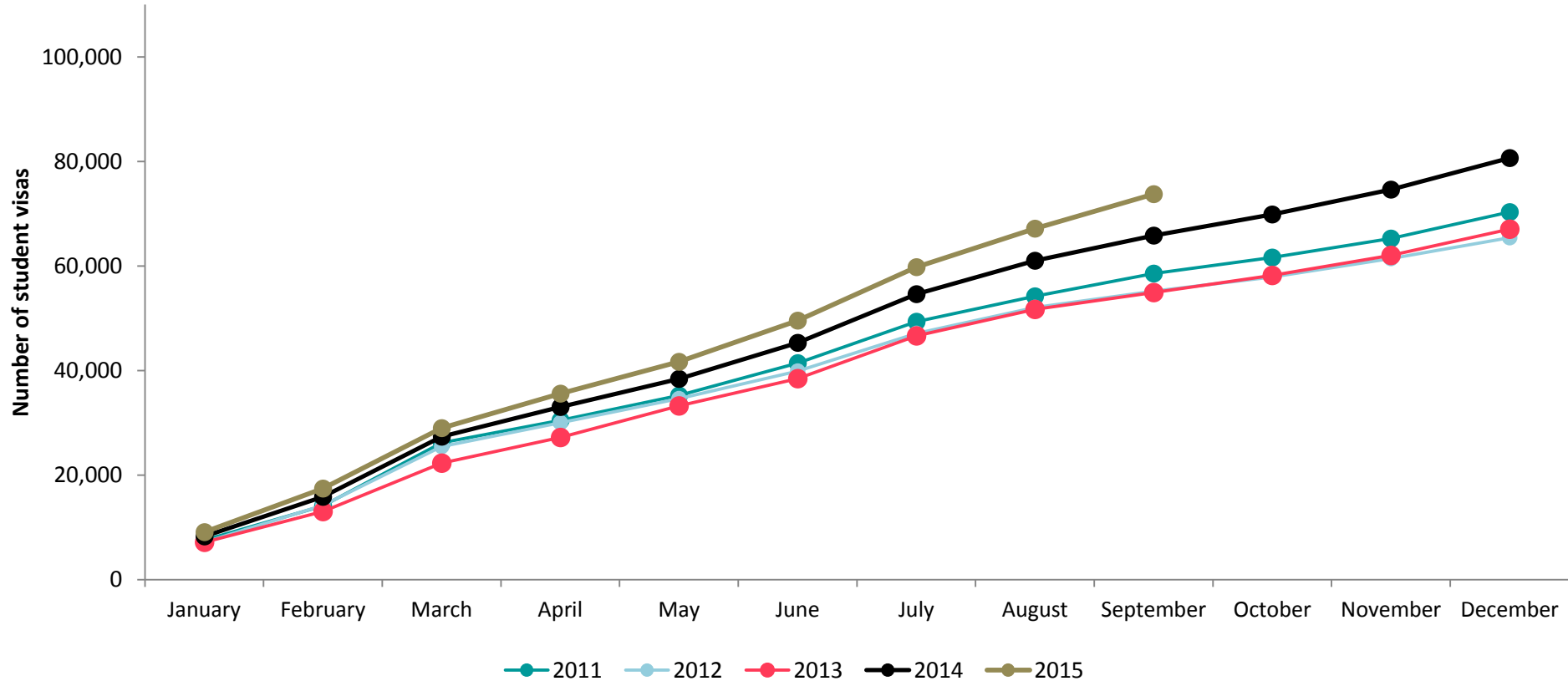
Saudi Arabia	-36	-67%
Japan	-26	-36%
Oman	-26	-81%
Great Britain	-15	-52%
Switzerland	-13	-62%

Sector FSVs for September	Change	% change
PTEs	496	29%
ITPs	160	39%
Secondary	73	25%
Primary	12	133%
Intermediate	1	6%
Universities	-72	-17%

Tracker

Cumulative total

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Takeaways:

- 2015 is currently tracking strongly above previous years, and is up 12% YTD.



Overall performance

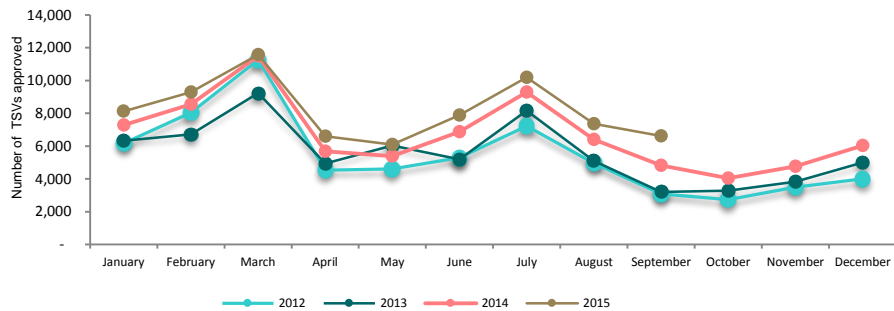
Top 20 markets (in order of 2015 volume)

Indicator	YTD TSVs	2014	2015	Change in numbers	% change
●	China	21,638	24,819	3,181	15%
●	India	13,620	17,046	3,426	25%
●	Korea	4,167	4,032	- 135	-3%
●	Japan	2,530	2,523	- 7	0%
●	USA	1,752	2,066	314	18%
●	Philippines	1,014	1,953	939	93%
●	Thailand	1,932	1,932	-	0%
●	Saudi Arabia	2,191	1,792	- 399	-18%
●	Brazil	1,366	1,520	154	11%
●	Viet Nam	1,405	1,358	- 47	-3%
●	Malaysia	1,232	1,266	34	3%
●	Germany	1,320	1,210	- 110	-8%
●	Hong Kong	937	974	37	4%
●	Sri Lanka	573	733	160	28%
●	Colombia	553	729	176	32%
●	Fiji	781	720	- 61	-8%
●	Taiwan	744	711	- 33	-4%
●	Indonesia	569	631	62	11%
●	Nepal	684	566	- 118	-17%
●	Russia	503	530	27	5%
●	Grand Total	65,826	73,748	7,922	12%

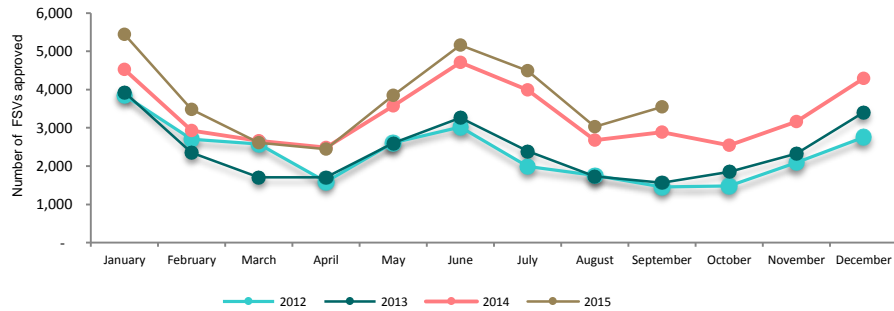
Indicator	YTD FSVs	2014	2015	Change in numbers	% change
●	India	9,222	10,346	1,124	12%
●	China	5,706	6,759	1,053	18%
●	USA	1,457	1,794	337	23%
●	Philippines	811	1,749	938	116%
●	Korea	1,514	1,509	- 5	0%
●	Japan	1,321	1,373	52	4%
●	Brazil	1,184	1,254	70	6%
●	Germany	1,112	1,030	- 82	-7%
●	Thailand	965	853	- 112	-12%
●	Colombia	455	554	99	22%
●	Malaysia	309	439	130	42%
●	Viet Nam	376	405	29	8%
●	Sri Lanka	226	390	164	73%
●	Chile	322	374	52	16%
●	Great Britain	305	337	32	10%
●	France	301	277	- 24	-8%
●	Indonesia	252	273	21	8%
●	Saudi Arabia	438	262	- 176	-40%
●	Bangladesh	199	258	59	30%
●	Nepal	514	250	- 264	-51%
●	Grand Total	30,418	34,064	3,646	12%

September RSV		September FSV		September TSV	
↑ 1,122	58%	↑ 668	23%	↑ 1,790	37%

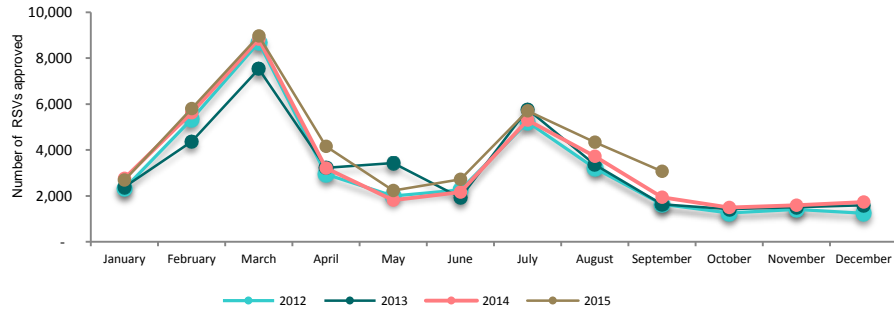
Overall: Total student visas (TSV), 2012 - 2015



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

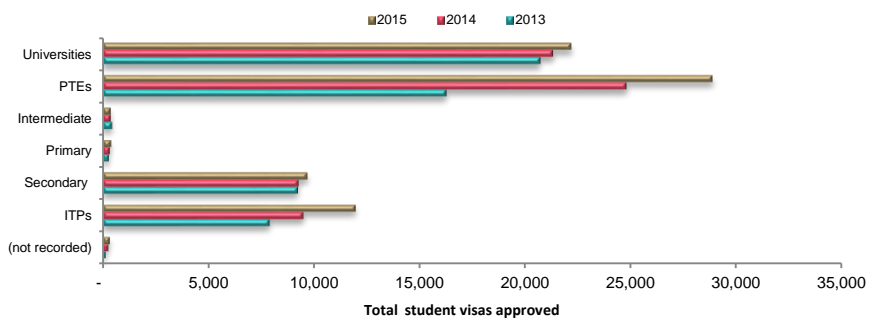


Overall: Renewed student visas (RSV), 2012 - 2015

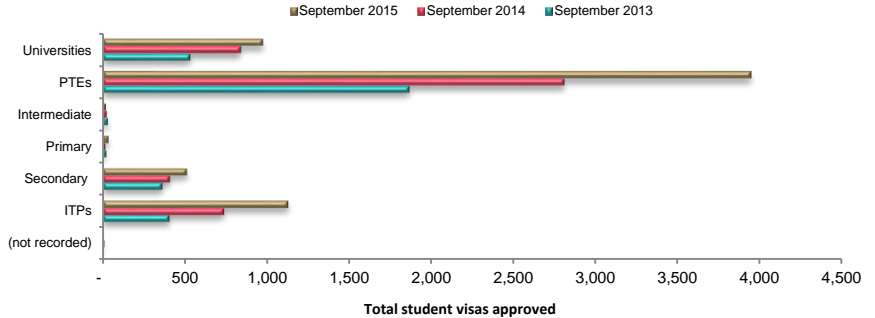


YTD RSV		YTD FSV		YTD TSV	
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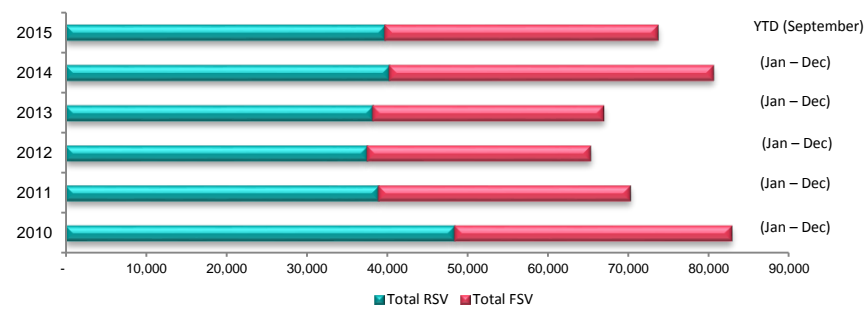
Overall: Total student visas issued by sector, YTD



Overall: Total student visas issued by sector, September



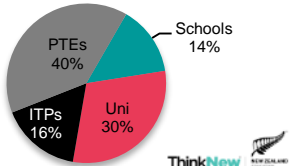
Overall: Cumulative total for RSV vs. FSV, 2010 - 2015



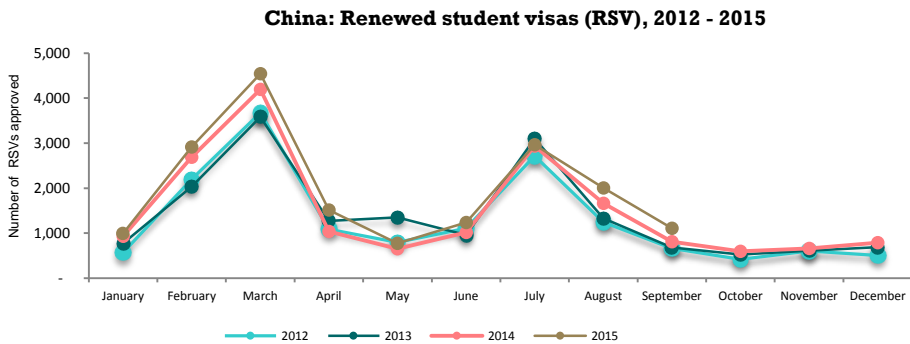
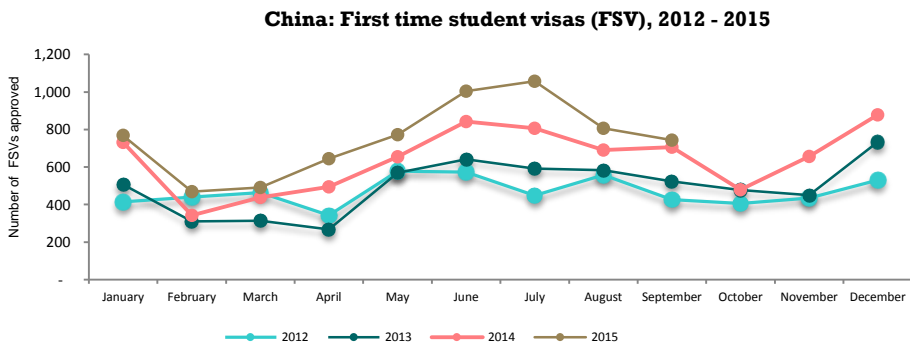
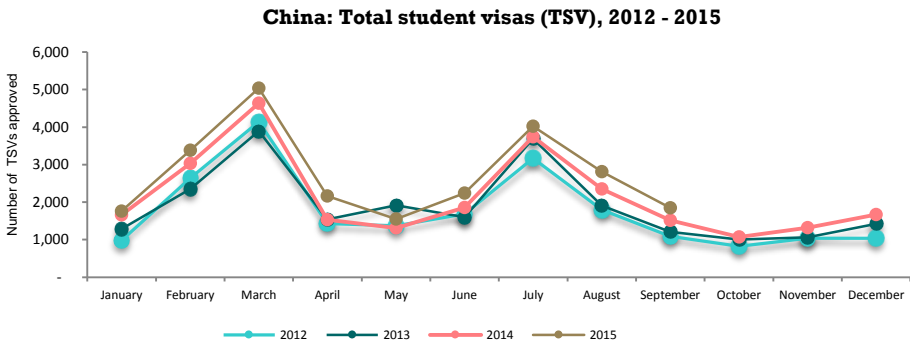
Takeaways:

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- September has been particularly positive, with FSVs up 23% and RSVs up 58%.
- The majority of YTD growth has been driven by PTEs and ITPs, together contributing an additional 6,555 TSVs.

YTD 2015 sector breakdown of TSVs






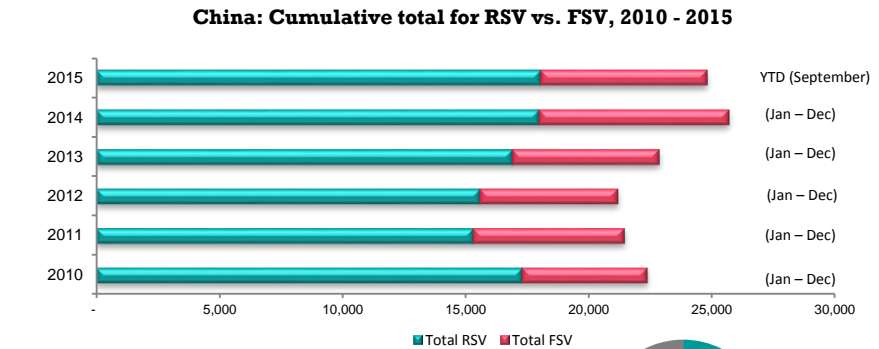
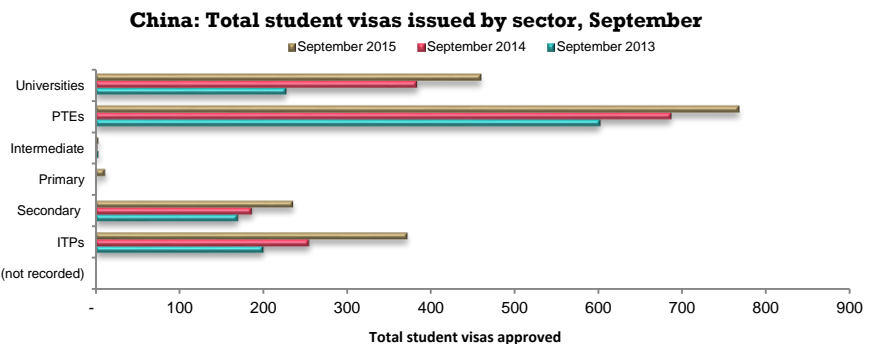
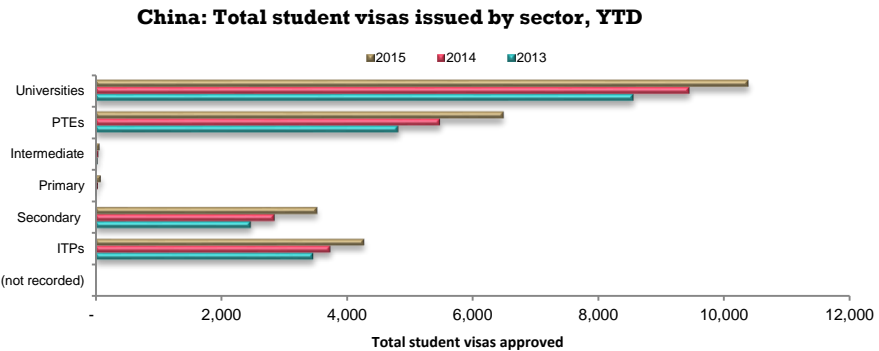
September RSV		September FSV		September TSV	
 298	37%	 37	5%	 335	22%



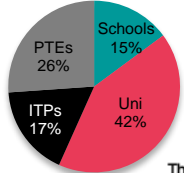
- Takeaways:**
- China continues to show strong growth in all sectors.
 - September FSVs grew by 5%, whilst RSVs increased by 37%.
 - TSVs have grown by 15% (3,181) YTD.

YTD (January to September)

YTD RSV		YTD FSV		YTD TSV	
 2,128	13%	 1,053	18%	 3,181	15%



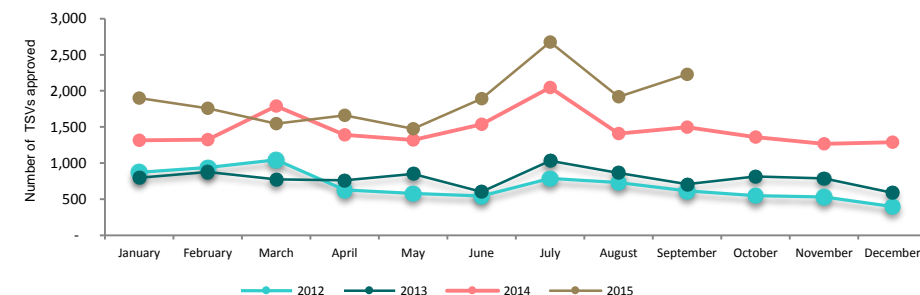
YTD 2015 sector breakdown of TSVs



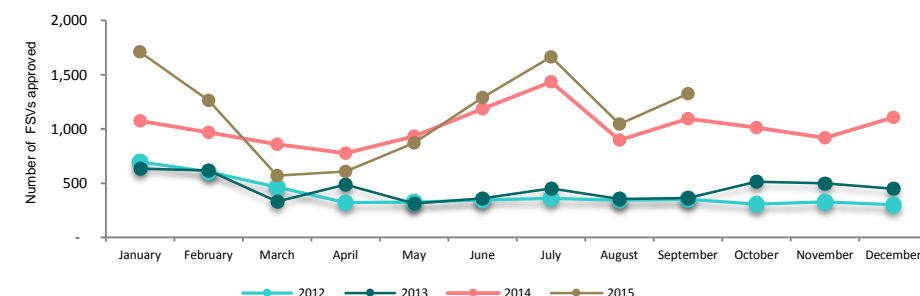
September RSV		September FSV		September TSV	
↑ 504	126%	↑ 228	21%	↑ 732	49%

YTD RSV		YTD FSV		YTD TSV	
↑ 2,305	52%	↑ 1,124	12%	↑ 3,429	25%

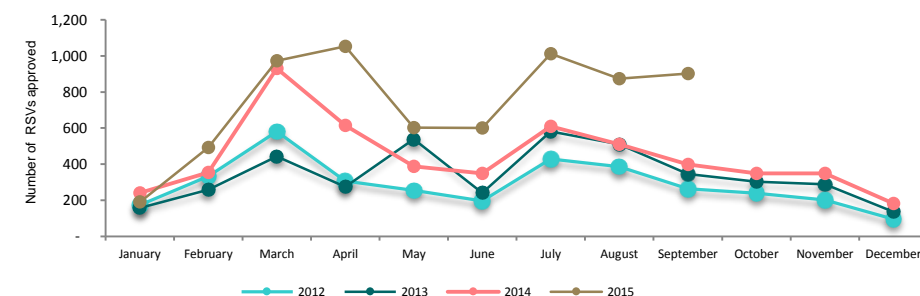
India: Total student visas (TSV), 2012 - 2015



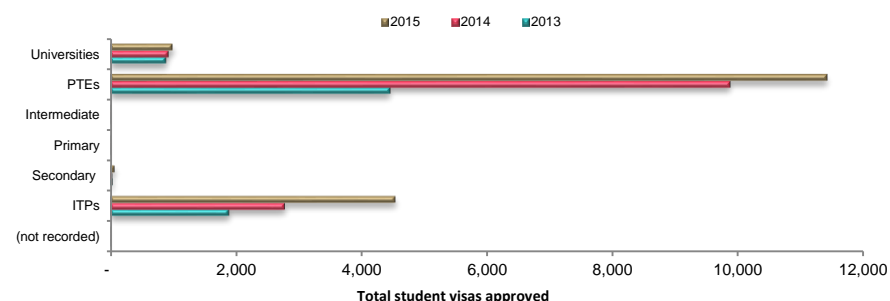
India: First time student visas (FSV), 2012 - 2015



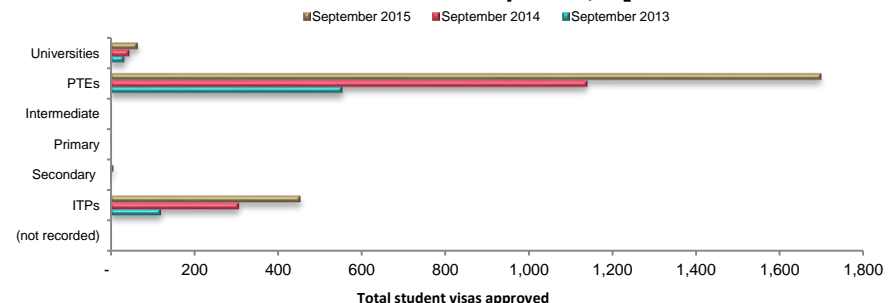
India: Renewed student visas (RSV), 2012 - 2015



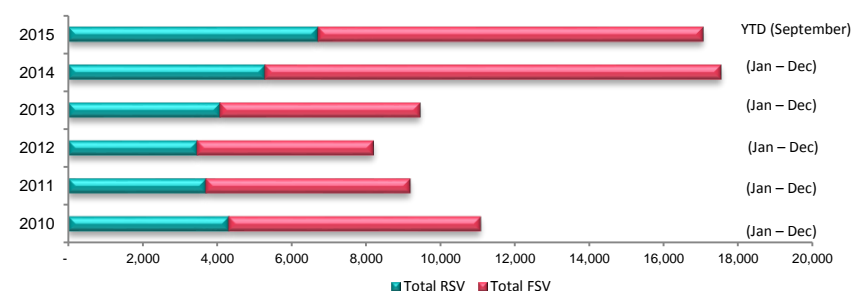
India: Total student visas issued by sector, YTD



India: Total student visas issued by sector, September

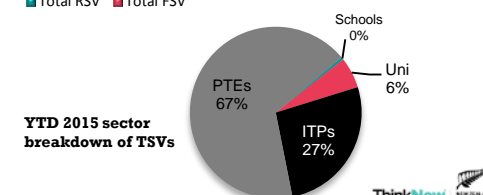


India: Cumulative total for RSV vs. FSV, 2010 - 2015



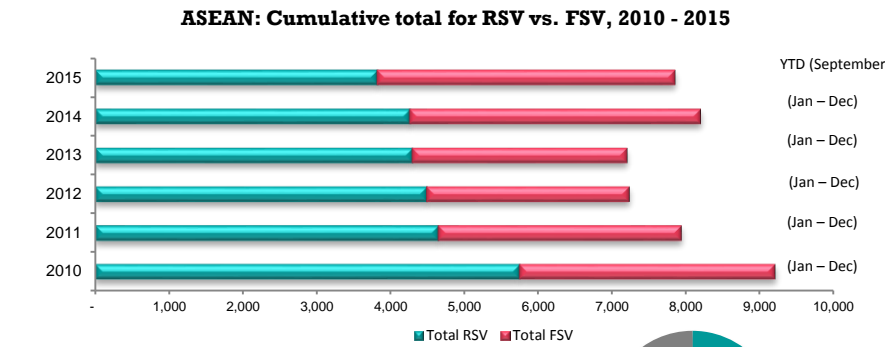
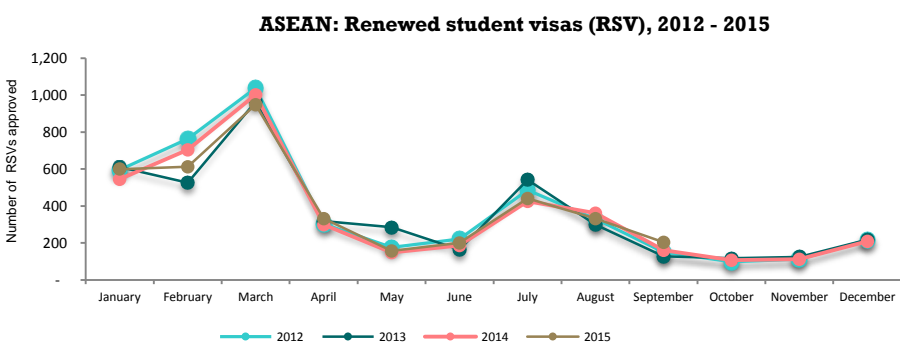
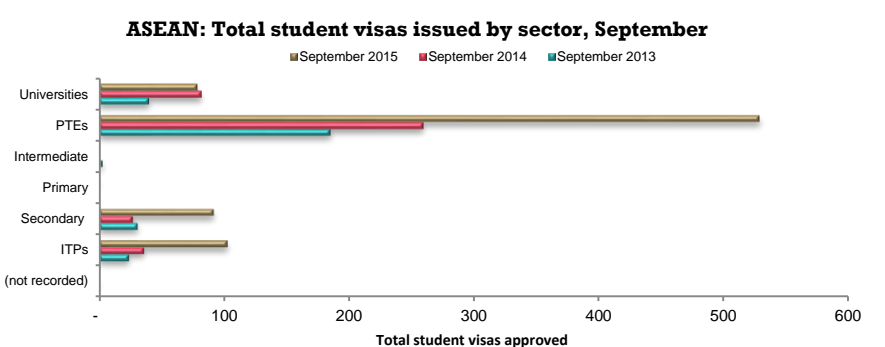
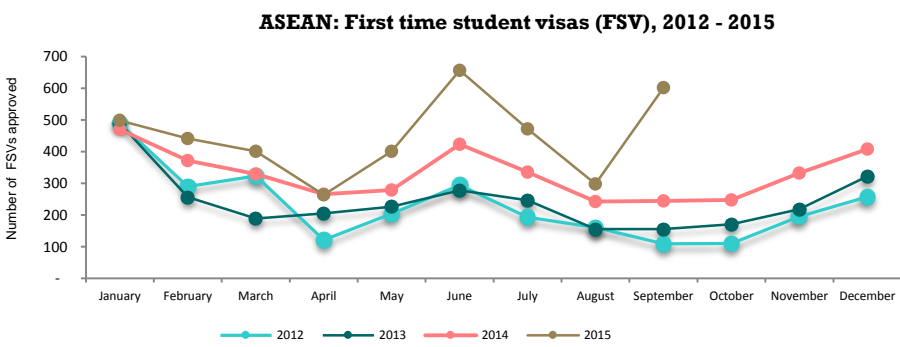
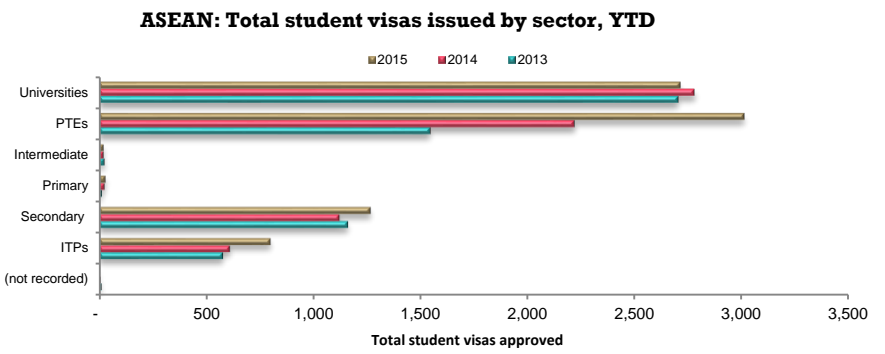
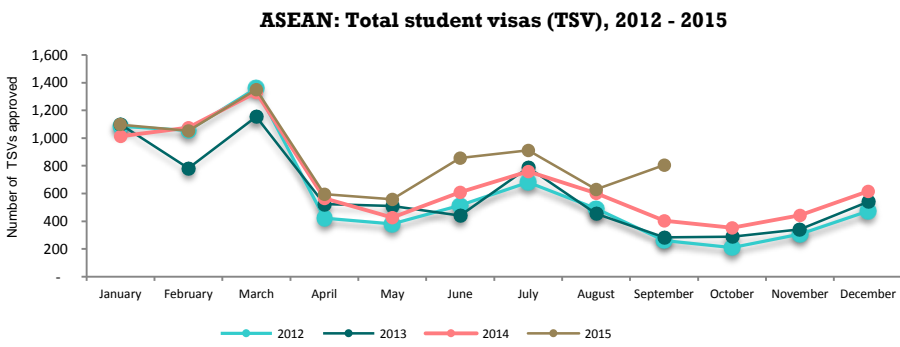
Takeaways:

- India continues to show strong growth in all sectors, but particularly in PTEs and ITPs.
- September was a particularly strong month for both FSVs and RSVs, up 21% and 126% respectively.
- During September, the majority of TSV growth was concentrated in PTEs, which increased by 49% (558).



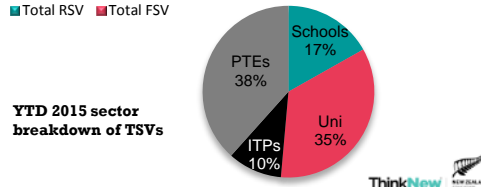
September RSV			September FSV		September TSV		
📈	43	27%	📈	358	147%	📈 401	99%

YTD RSV		YTD FSV		YTD TSV	
↓ -6	0%	↑ 1,074	36%	↑ 1,068	16%



Takeaways:

- ASEAN has demonstrated strong growth in FSVs, up 36% (1,074) YTD.
- September FSVs increased by 147% (358) and RSVs by 27% (43).
- PTEs have shown a 36% (792) growth in TSVs YTD, while universities have decreased by 2% (-65).



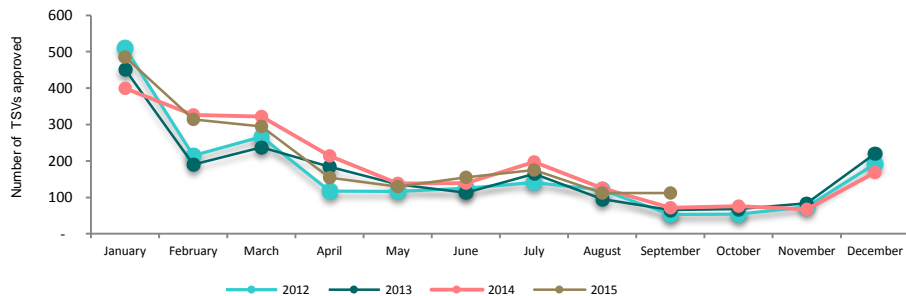
Thailand:

YTD (January to September)

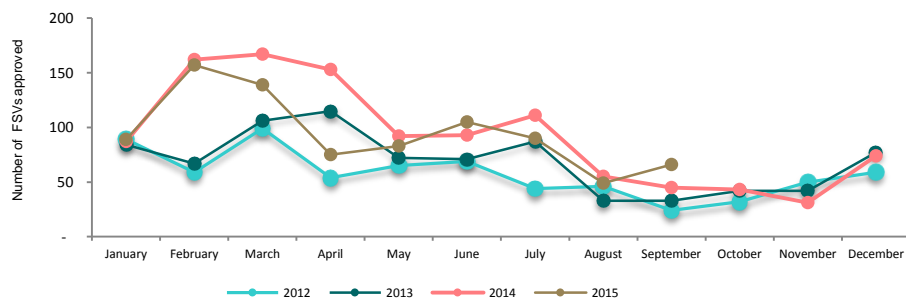
September RSV		September FSV		September TSV	
↑	19	70%	↑	21	47%
↑	40	56%			

YTD RSV		YTD FSV		YTD TSV	
↑	112	12%	↓	-112	-12%
			→	0	0%

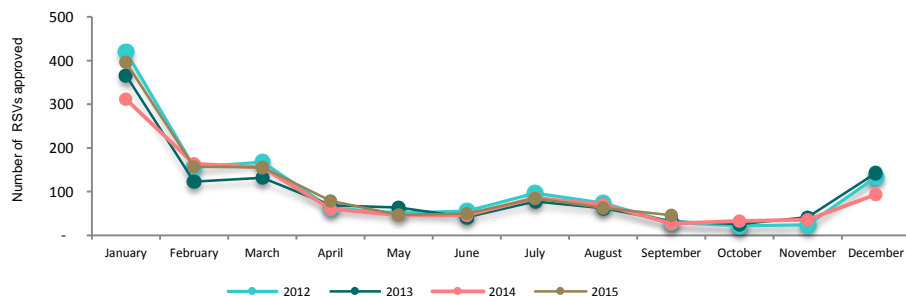
Thailand: Total student visas (TSV), 2012 - 2015



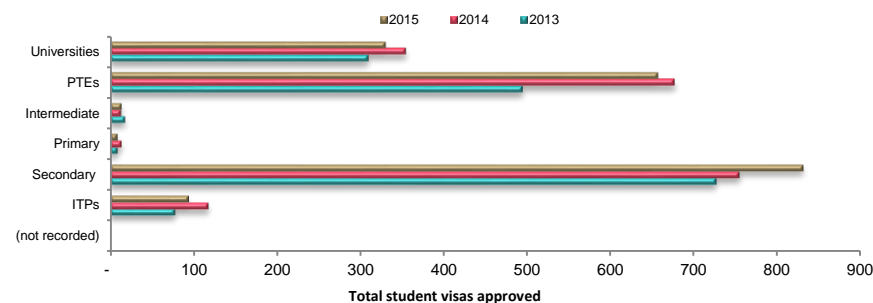
Thailand: First time student visas (FSV), 2012 - 2015



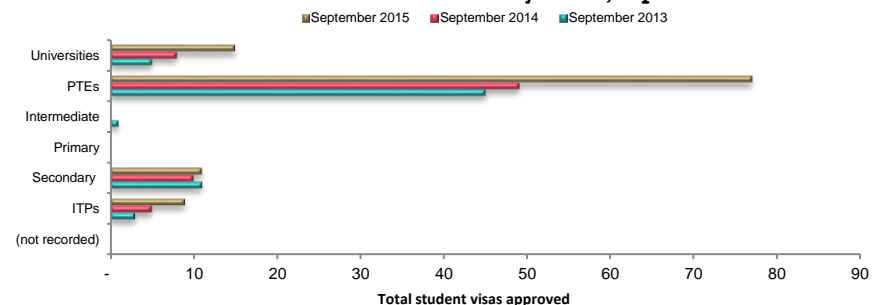
Thailand: Renewed student visas (RSV), 2012 - 2015



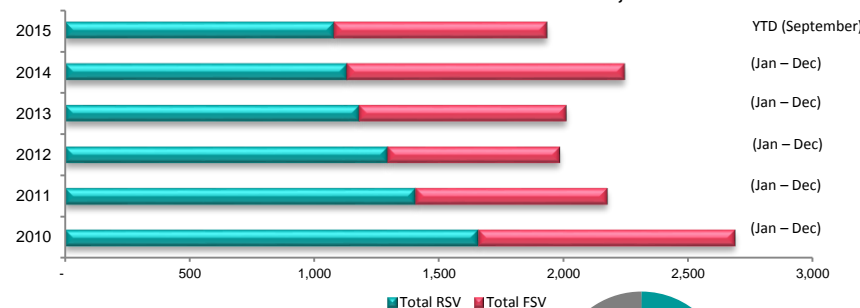
Thailand: Total student visas issued by sector, YTD



Thailand: Total student visas issued by sector, September



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



YTD (September)

(Jan - Dec)

(Jan - Dec)

(Jan - Dec)

(Jan - Dec)

(Jan - Dec)

(Jan - Dec)

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(Jan - Dec)

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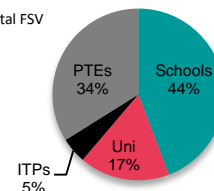
(Jan - Dec)

(Jan - Dec)

Takeaways:

- Thailand is currently tracking flat on YTD TSVs, with an increase in RSVs equally offset by a decrease in FSVs.
- September has delivered positive results, with FSVs up 47% and RSVs up 70%.
- During September, the majority of growth in TSVs was concentrated within the PTE sector, which increased by 57%.

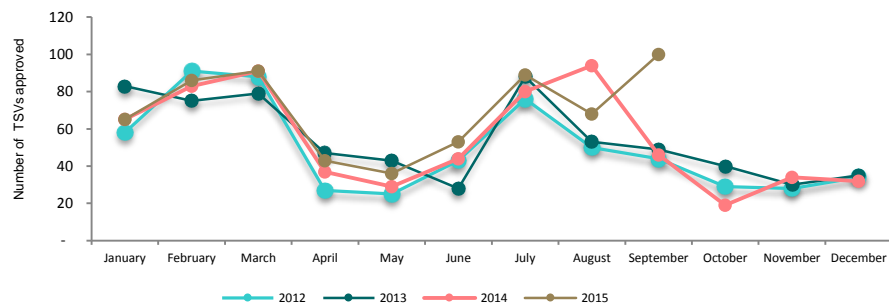
YTD 2015 sector
breakdown of TSVs



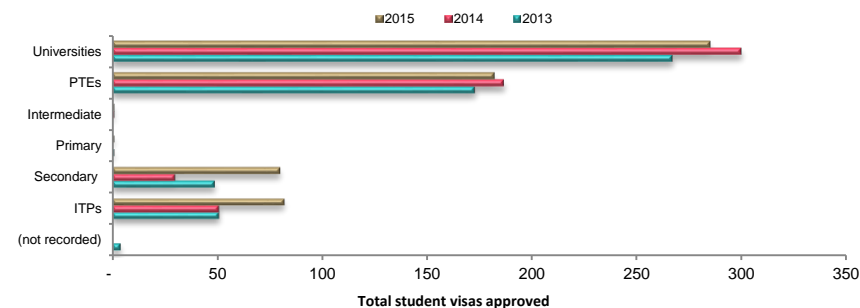
September RSV		September FSV		September TSV	
↑	18	113%	↑	36	120%
↑	54	117%			

YTD RSV		YTD FSV		YTD TSV	
↑	41	13%	↑	21	8%
↑	62	11%			

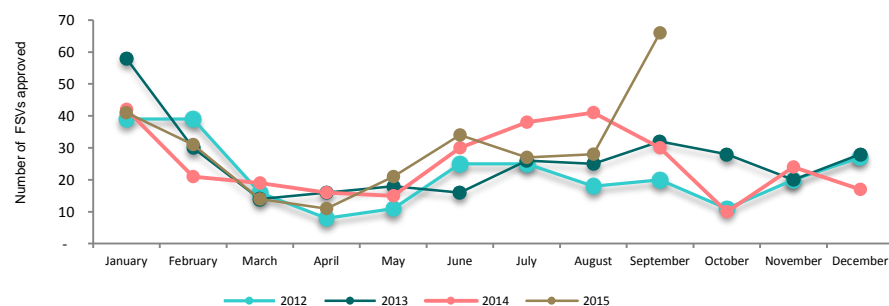
Indonesia: Total student visas (TSV), 2012 - 2015



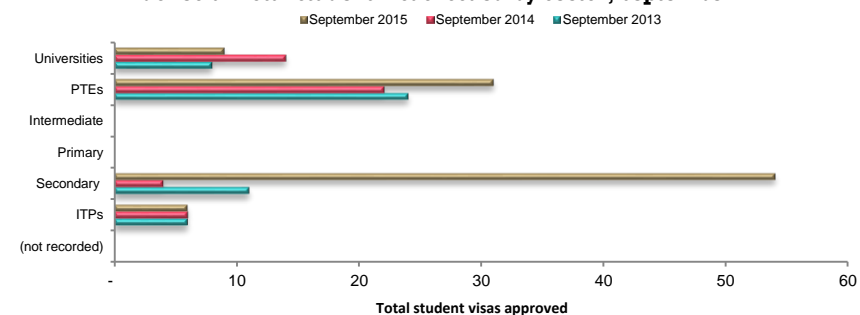
Indonesia: Total student visas issued by sector, YTD



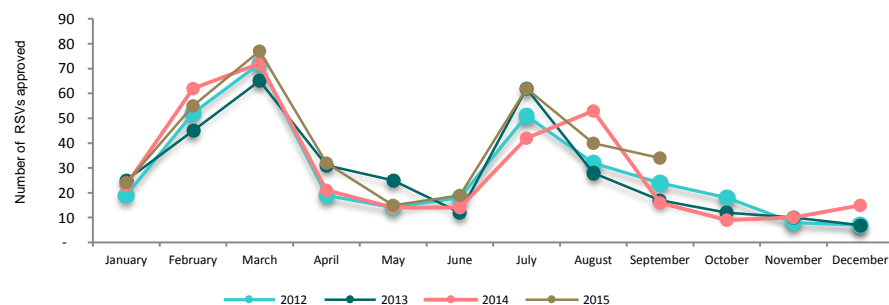
Indonesia: First time student visas (FSV), 2012 - 2015



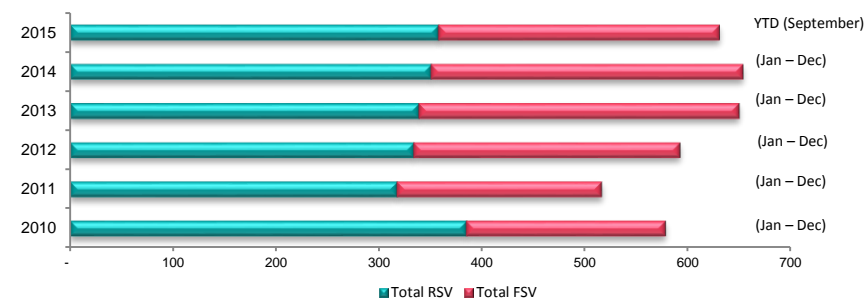
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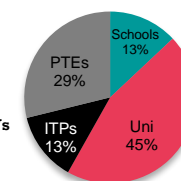
Indonesia: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- Indonesia demonstrated a strong September, with FSVs up 120% (36) and RSVs up 113% (18).
- FSV growth was concentrated within secondary schools during September with an increase of 1,250% (50).

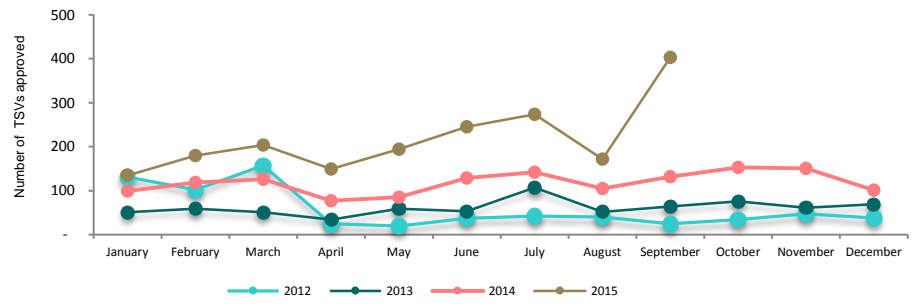
YTD 2015 sector breakdown of TSVs



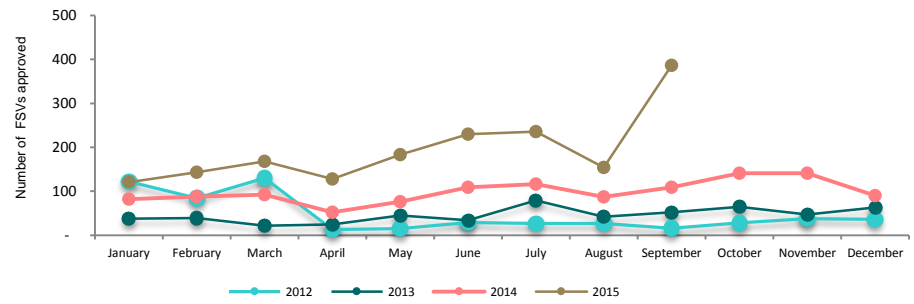
Philippines

September RSV		September FSV		September TSV	
↓ -6	-26%	↑ 277	254%	↑ 271	205%

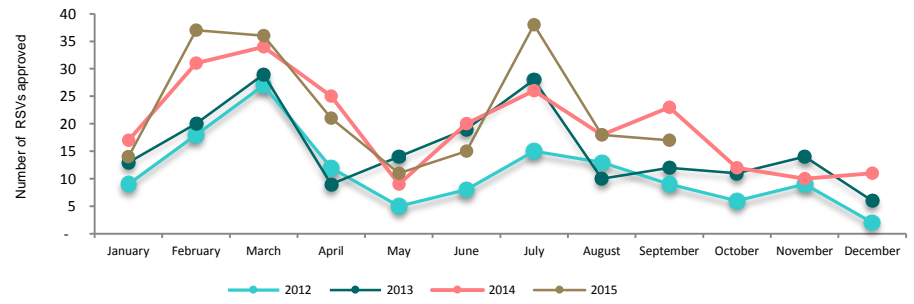
Philippines: Total student visas (TSV), 2012 - 2015



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



Philippines: Renewed student visas (RSV), 2012 - 2015



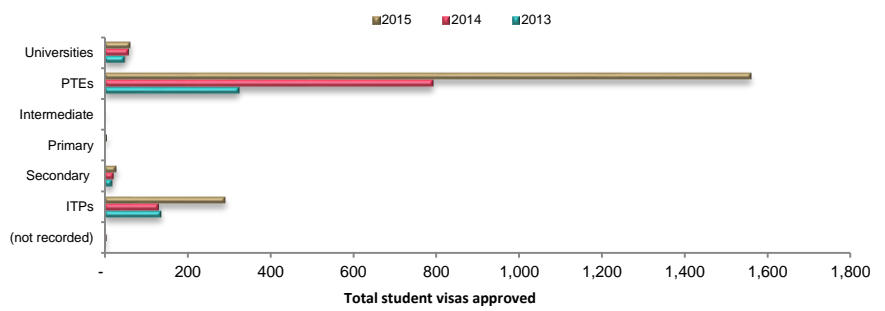
Takeaways:

- The Philippines continues to be one of NZ's fastest growing markets, both in absolute and percentage terms. YTD, TSVs have increased by 93% (942), and FSVs have increased by 116% (938).
- During September, FSVs showed particularly strong growth, up 254% (277). This growth was concentrated within the PTE sector, up 210% (221), and the ITP sector, up 1,375% (55).

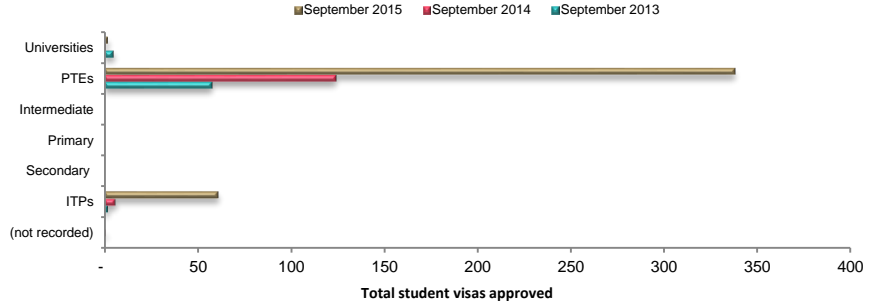
YTD (January to September)

YTD RSV		YTD FSV		YTD TSV	
↑ 4	2%	↑ 938	116%	↑ 942	93%

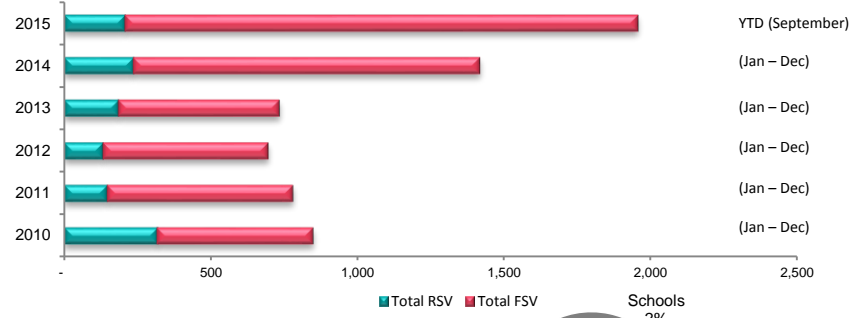
Philippines: Total student visas issued by sector, YTD



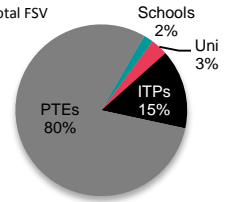
Philippines: Total student visas issued by sector, September






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



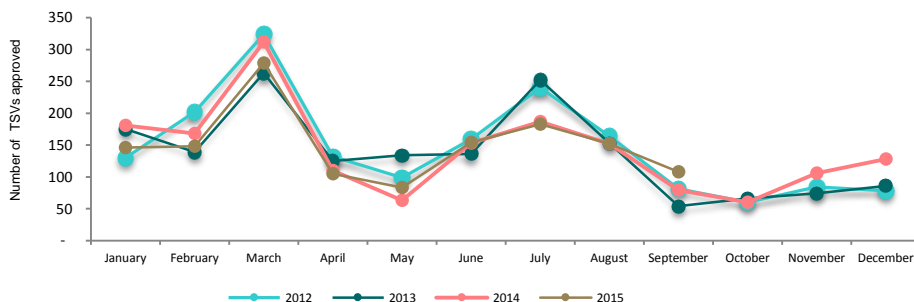
YTD 2015 sector breakdown of TSVs



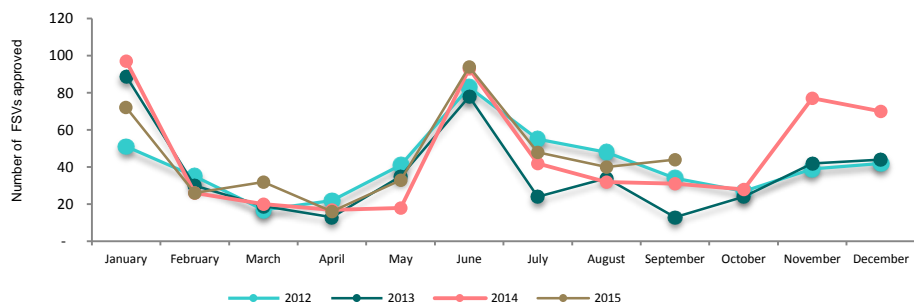
September RSV			September FSV		September TSV		
↑	16	33%	↑	13	42%	↑ 29	37%

YTD RSV		YTD FSV		YTD TSV	
 -76	-7%	 29	8%	 -47	-3%

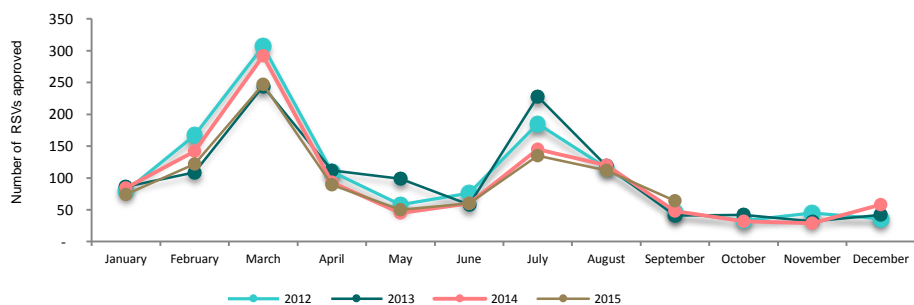
Viet Nam: Total student visas (TSV), 2012 - 2015



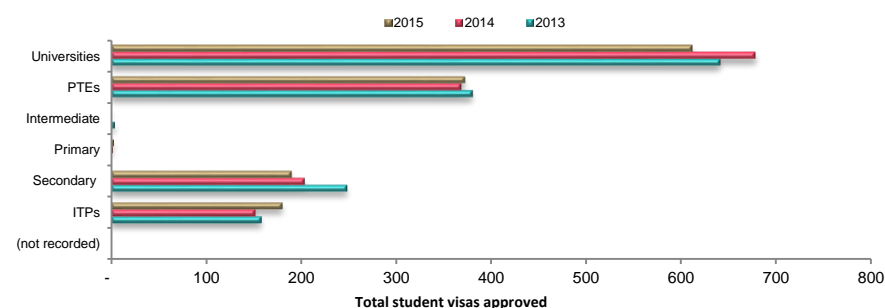
Viet Nam: First time student visas (FSV), 2012 - 2015



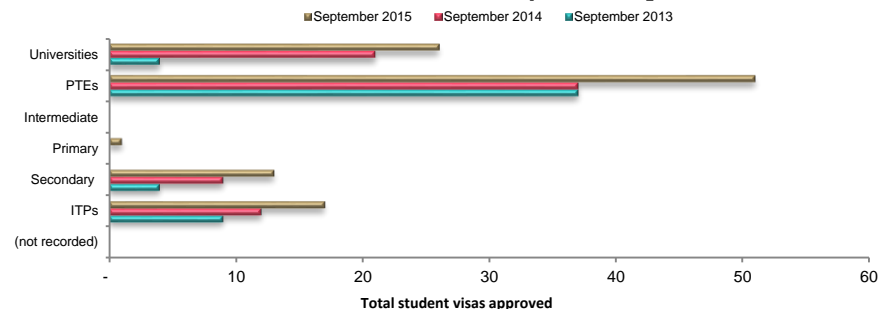
Viet Nam: Renewed student visas (RSV), 2012 - 2015



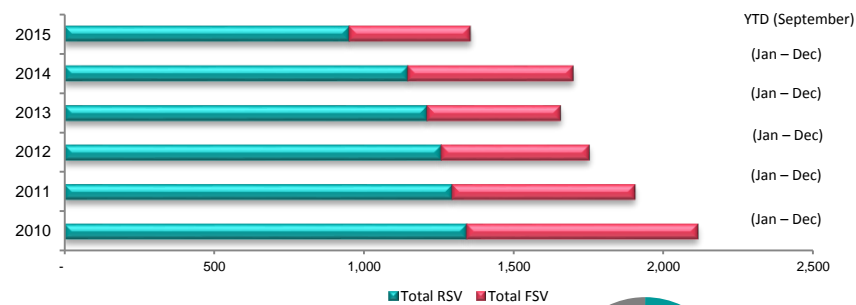
Viet Nam: Total student visas issued by sector, YTD



Viet Nam: Total student visas issued by sector, September

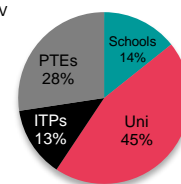


Viet Nam: Cumulative total for RSV vs. FSV, 2010 - 2015



■ Total RSV ■ Total FSV

YTD 2015 sector breakdown of TSVs

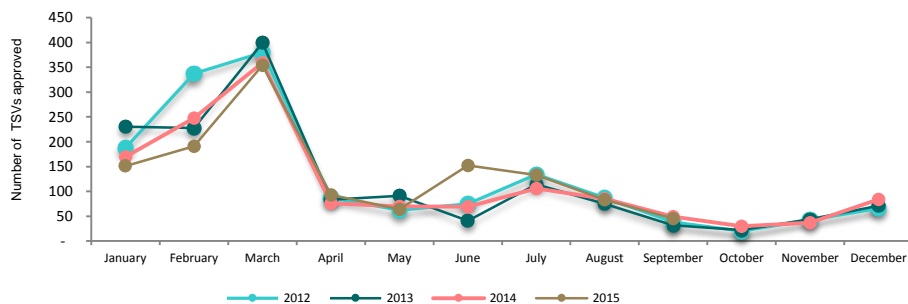


Takeaways:

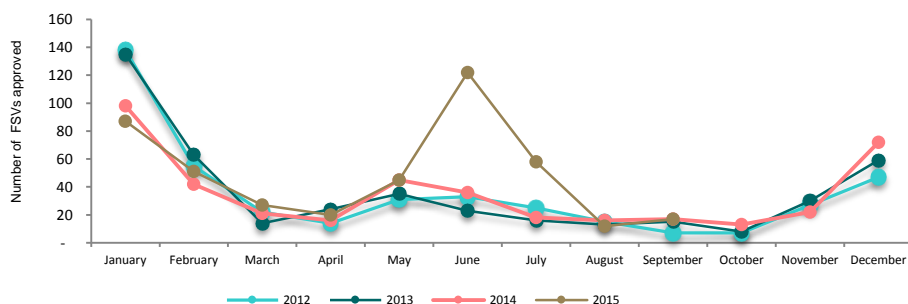
- YTD, TSVs are tracking relatively flat, with a decline in RSVs mostly offset by an increase in FSVs.
- September was a strong month for both FSVs and RSVs, up 42% and 33% respectively. The largest increase in TSVs was in PTEs.
- Reports from the market indicate that there has been a steady increase in students that have a higher risk profile for Immigration NZ. This is leading to higher declines and lower student numbers approved. ENZ is working with INZ to better understand this issue.

September RSV		September FSV		September TSV	
↓	-4	→	0	↓	-4
	-13%		0%		-8%

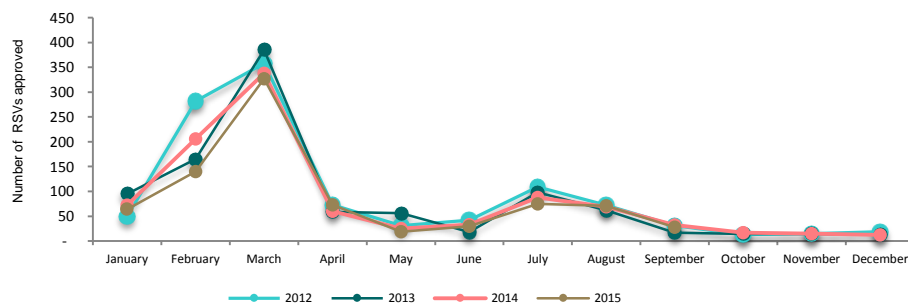
Malaysia: Total student visas (TSV), 2012 - 2015



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



Malaysia: Renewed student visas (RSV), 2012 - 2015

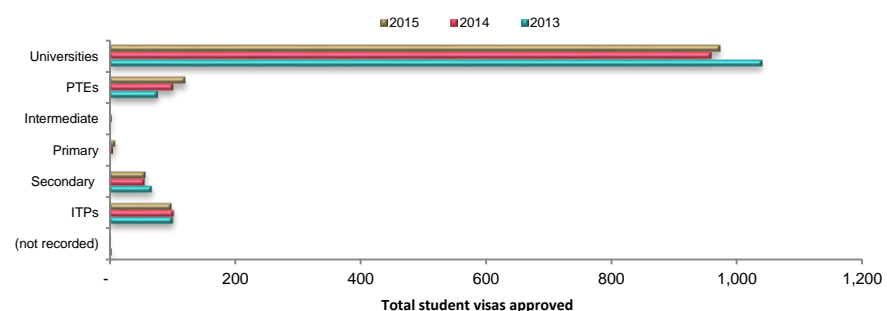


Takeaways:

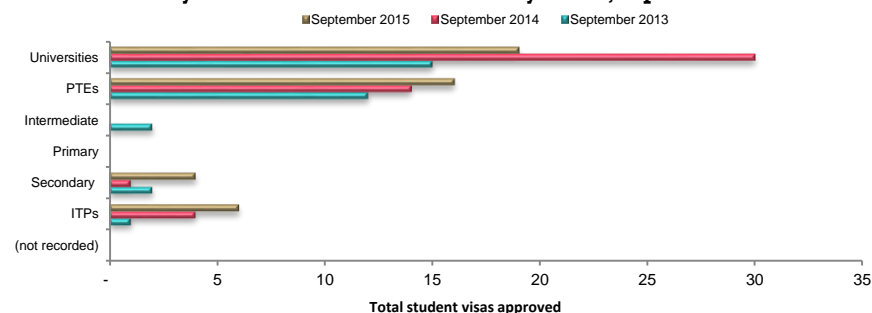
- Malaysian YTD TSVs are largely flat. This is the result of FSVs, up 42% (130), offsetting the decline in RSVs, down 10% (-96).
- September's result has been slightly negative, with a 13% (-4) decline in RSVs and a 0% (0) move in FSVs.
- The largest sector change during September was at universities, which declined by 37%.

YTD RSV		YTD FSV		YTD TSV	
↓	-96	↑	130	↑	34
	-10%		42%		3%

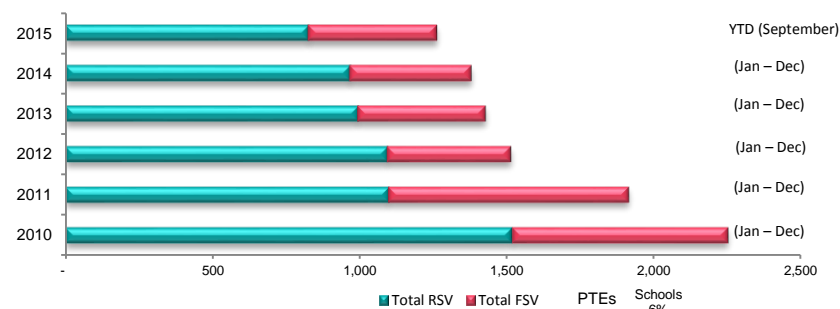
Malaysia: Total student visas issued by sector, YTD



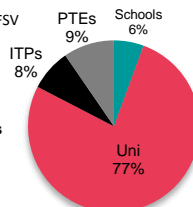
Malaysia: Total student visas issued by sector, September









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



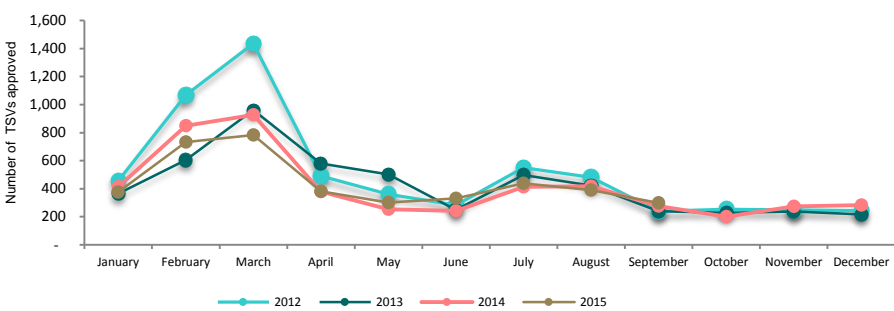
YTD 2015 sector breakdown of TSVs



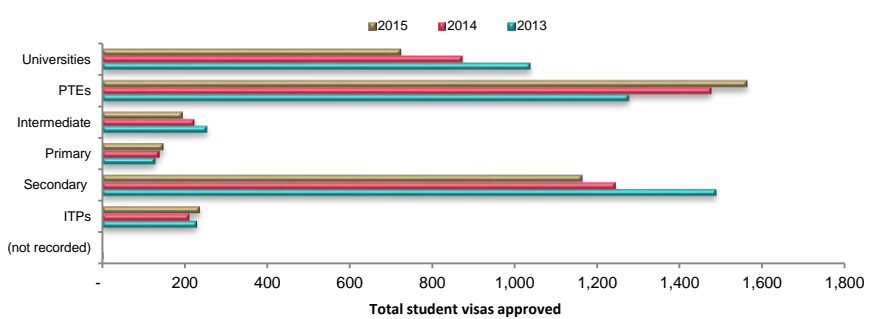
September RSV			September FSV		September TSV			
	27	24%		-3	-2%		24	9%

YTD RSV		YTD FSV		YTD TSV	
 -130	-5%	 -5	0%	 -135	-3%

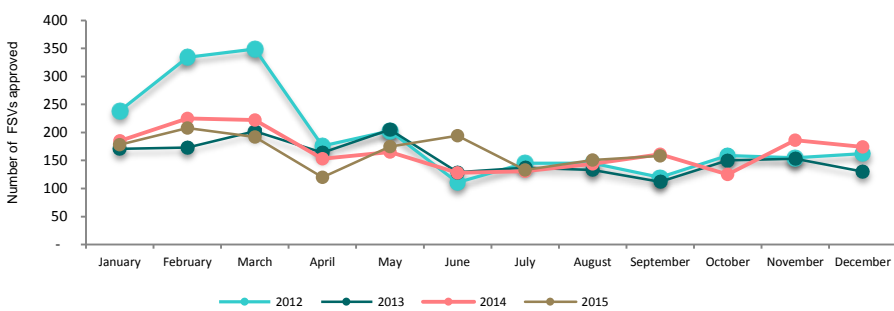
Korea: Total student visas (TSV), 2012 - 2015



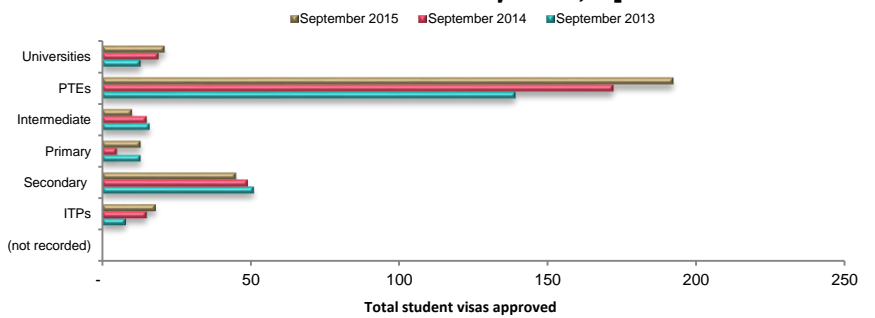
Korea: Total student visas issued by sector, YTD



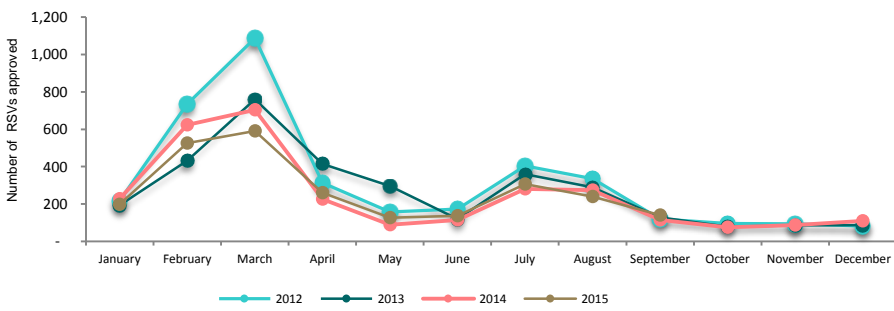
Korea: First time student visas (FSV), 2012 - 2015



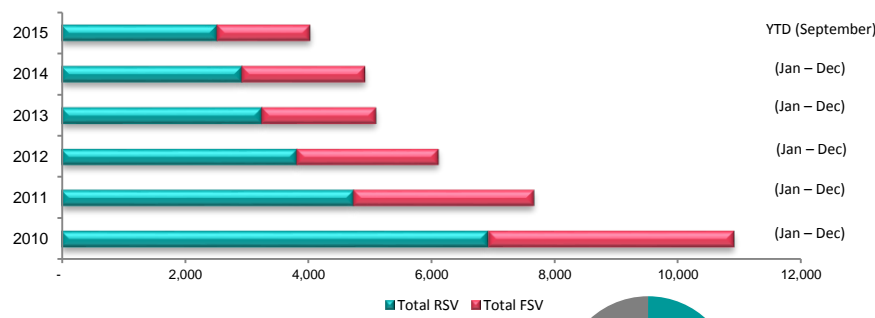
Korea: Total student visas issued by sector, September



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



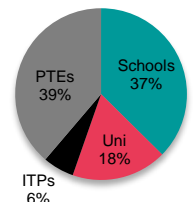
Korea: Cumulative total for RSV vs. FSV, 2010 - 2015









Takeaways:

- Considering that Korean student numbers have been in decline in recent years, September showed a strong result, with TSVs up 9%. This was driven by a 24% (27) increase in RSVs.
- On a YTD basis, TSVs have declined by 3% (-135), driven by a 5% (-130) decline in RSVs.
- On a sector basis, PTE TSVs grew by 12% (20) during September.

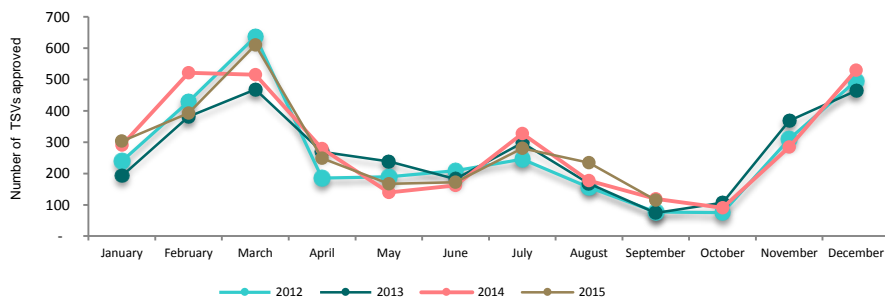
YTD 2015 sector breakdown of TSVs



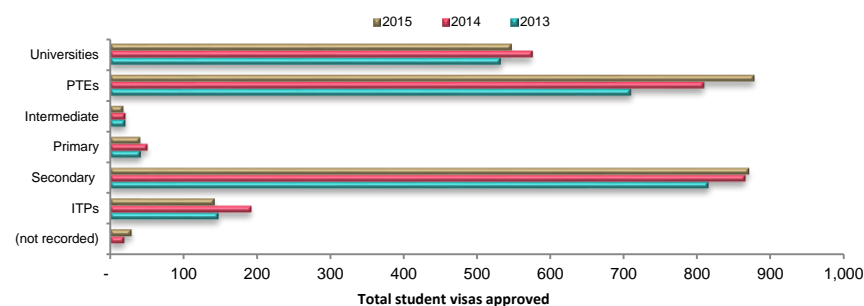
September RSV		September FSV		September TSV	
	22	47%		-26	-36%
				-4	-3%

YTD RSV		YTD FSV		YTD TSV	
	-59	-5%		52	4%
				-7	0%

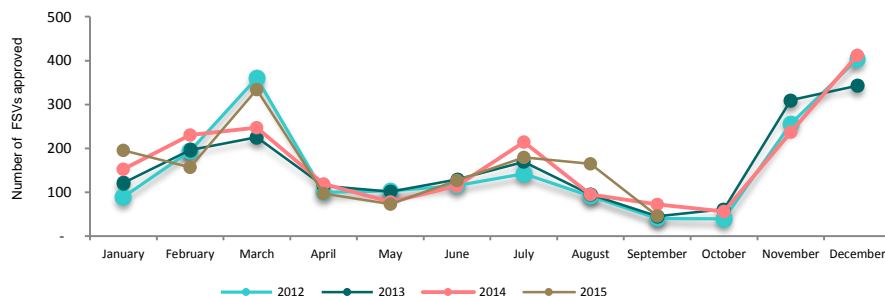
Japan: Total student visas (TSV), 2012 - 2015



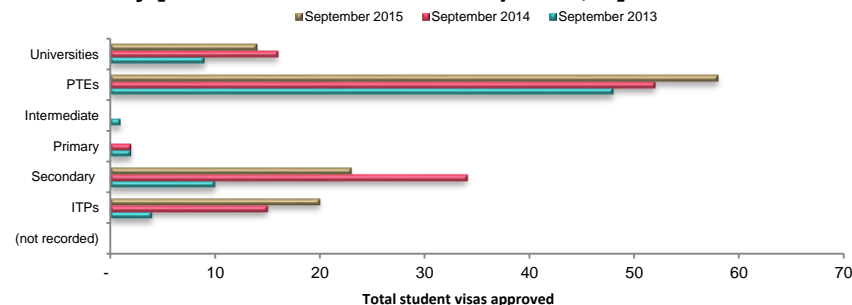
Japan: Total student visas issued by sector, YTD



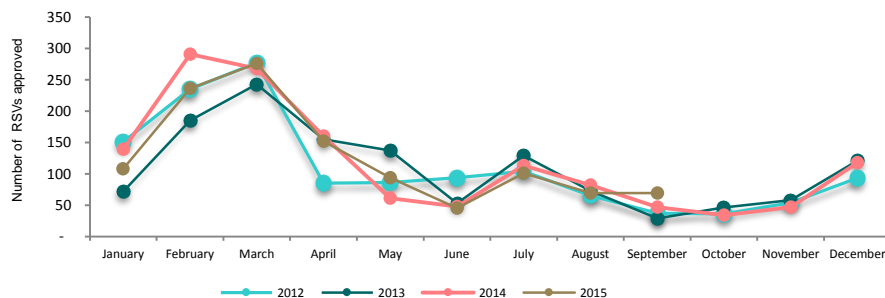
Japan: First time student visas (FSV), 2012 - 2015



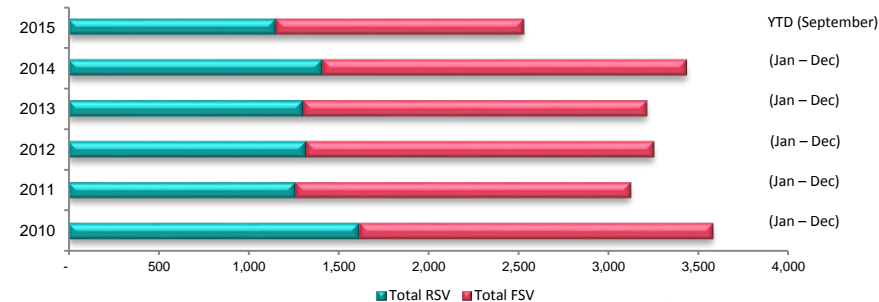
Japan: Total student visas issued by sector, September



Japan: Renewed student visas (RSV), 2012 - 2015



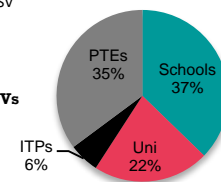
Japan: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- September's RSVs increased by 47% (22) whilst FSVs declined by 36% (-26), which offset to provide a 3% (-4) decline in TSVs.
- Japan has experienced mixed results YTD, with increases in some sectors (such as PTEs) offsetting declines in other sectors (such as ITPs).

YTD 2015 sector breakdown of TSVs



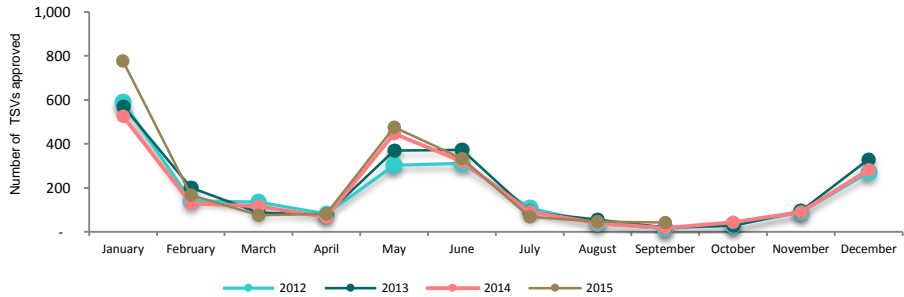
United States of America:

YTD (January to September)

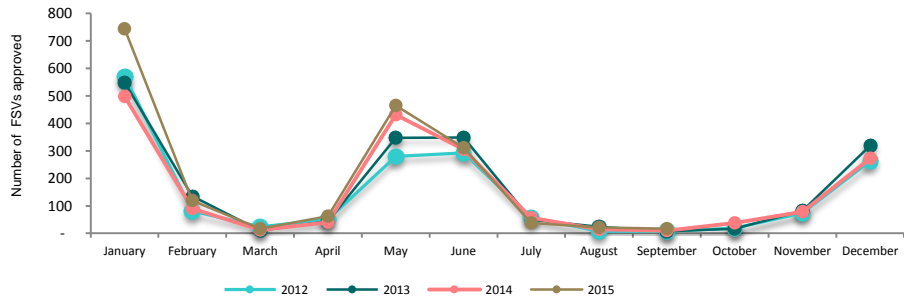
September RSV			September FSV			September TSV		
↑	17	213%	↑	7	70%	↑	24	133%

YTD RSV			YTD FSV			YTD TSV		
↓	-23	-8%	↑	337	23%	↑	314	18%

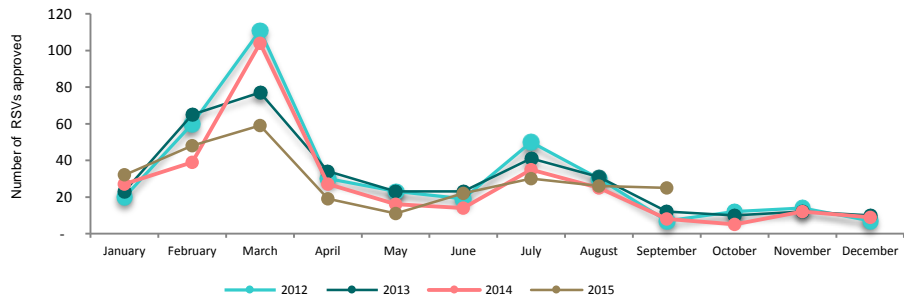
USA: Total student visas (TSV), 2012 - 2015



USA: First time student visas (FSV), 2012 - 2015



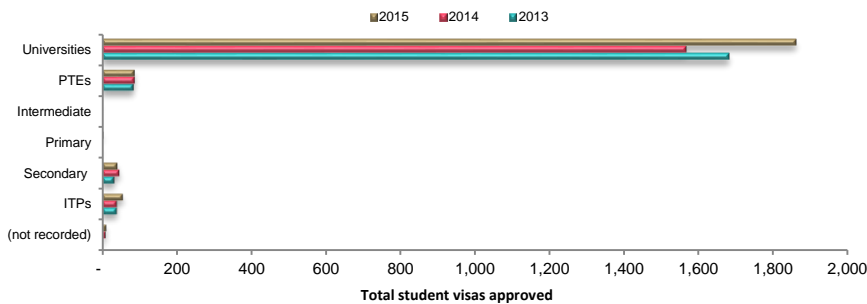
USA: Renewed student visas (RSV), 2012 - 2015



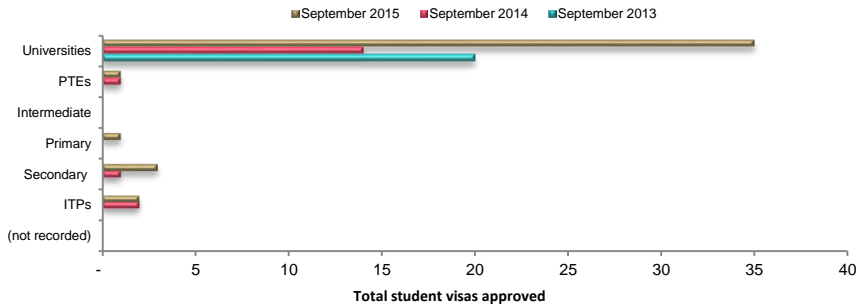
Takeaways:

- The USA has shown strong growth this year, increasing YTD TSVs by 18%.
- During September both RSVs and FSVs showed a strong increase, up 213% (17) and 70% (7) respectively.
- The majority of growth in TSVs during September was attributed to universities.

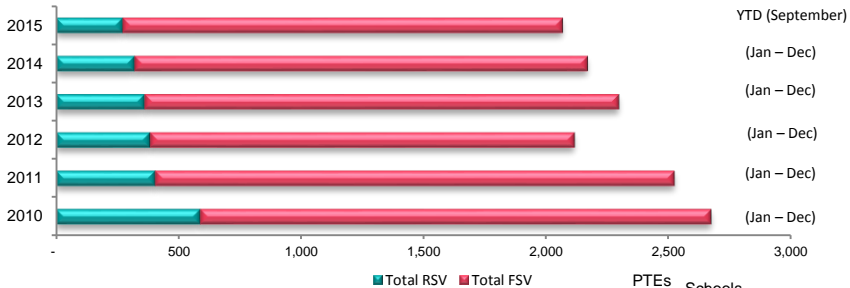
USA: Total student visas issued by sector, YTD



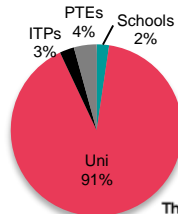
USA: Total student visas issued by sector, September



USA: Cumulative total for RSV vs. FSV, 2010 - 2015



YTD 2015 sector breakdown of TSVs



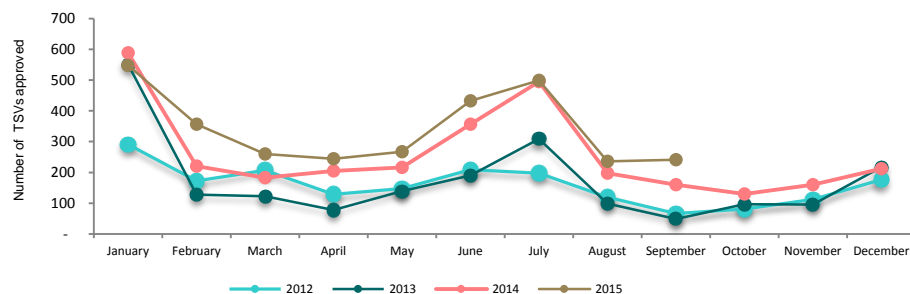
Latin America:

YTD (January to September)

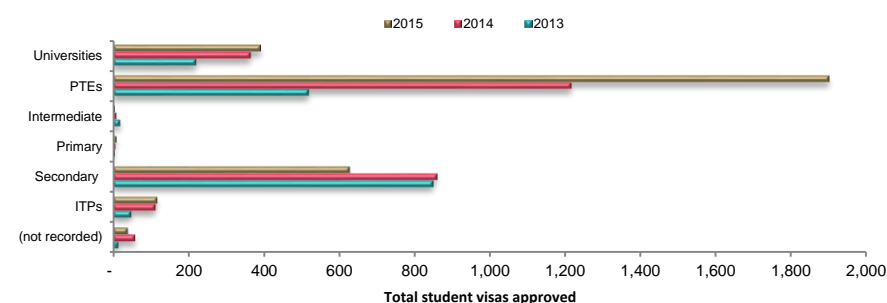
September RSV			September FSV		September TSV			
↑	14	32%	↑	67	58%	↑	81	51%

YTD RSV		YTD FSV		YTD TSV	
↑ 173	40%	↑ 289	13%	↑ 462	18%

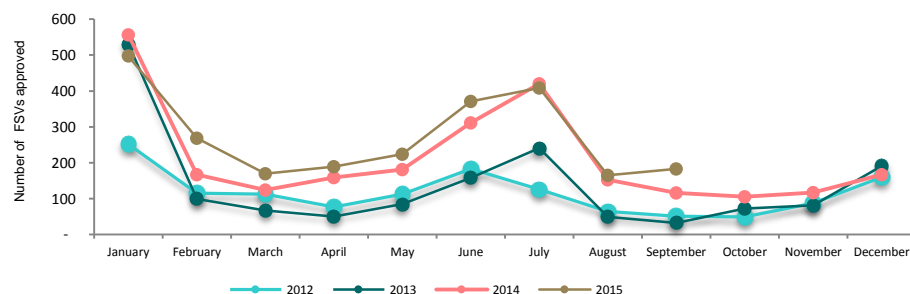
Latin America: Total student visas (TSV), 2012 - 2015



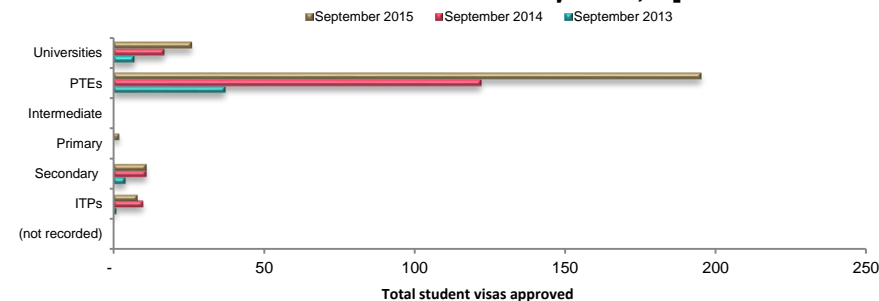
Latin America: Total student visas issued by sector, YTD



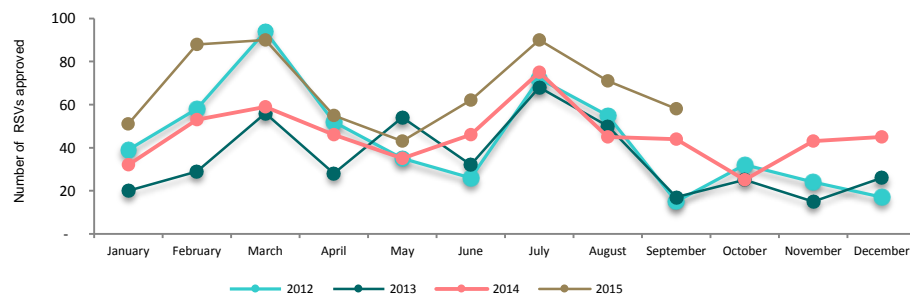
Latin America: First time student visas (FSV), 2012 - 2015



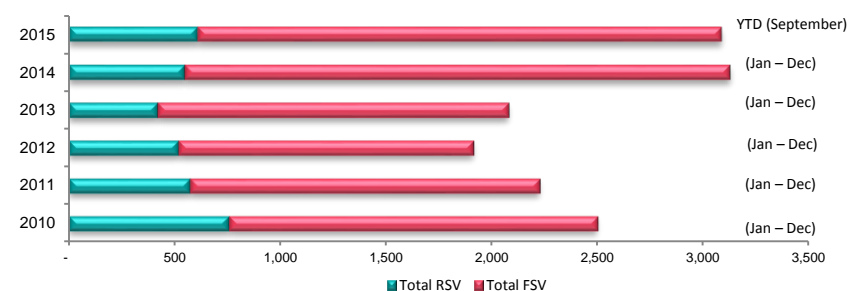
Latin America: Total student visas issued by sector, September



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



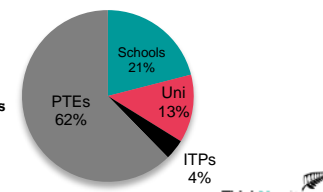
Latin America: Cumulative total for RSV vs. FSV, 2010 - 2015



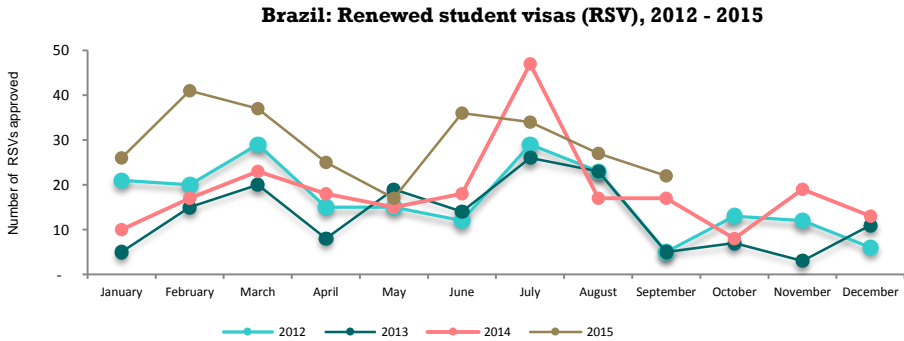
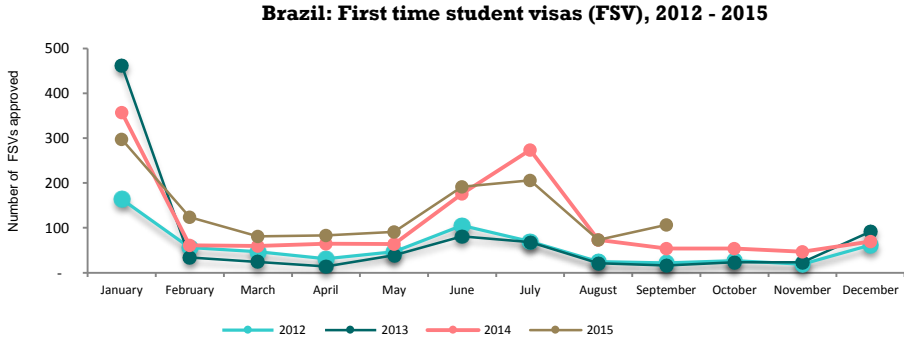
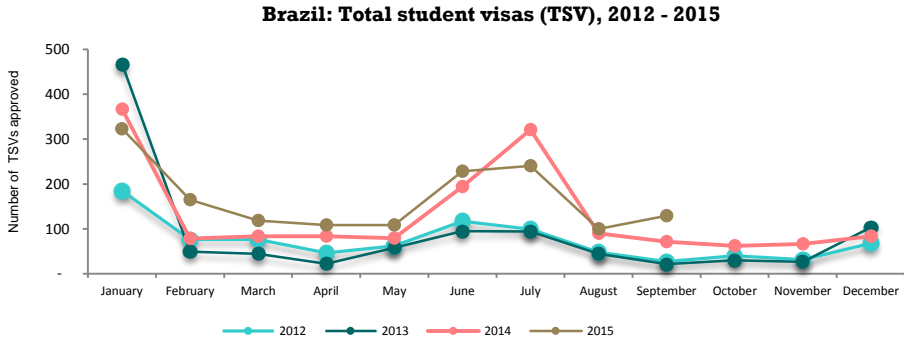
Takeaways:

- Latin America has shown strong YTD growth, with RSVs up by 40% (173) and FSVs up by 13% (289).
- September was a particularly strong month, with RSVs up 32% (14) and FSVs up 58% (67).
- During September the increase in TSVs was concentrated within the PTE sector, up 60% (73).

YTD 2015 sector
breakdown of TSVs



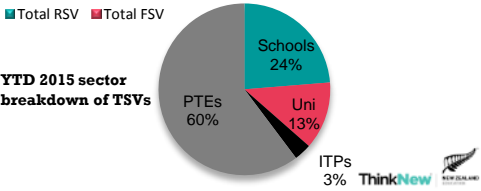
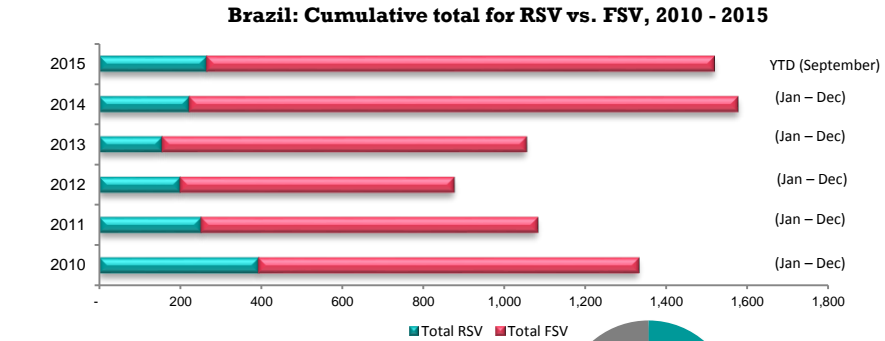
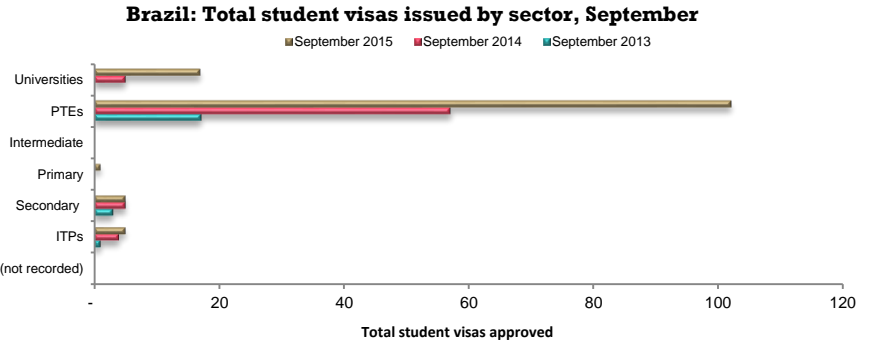
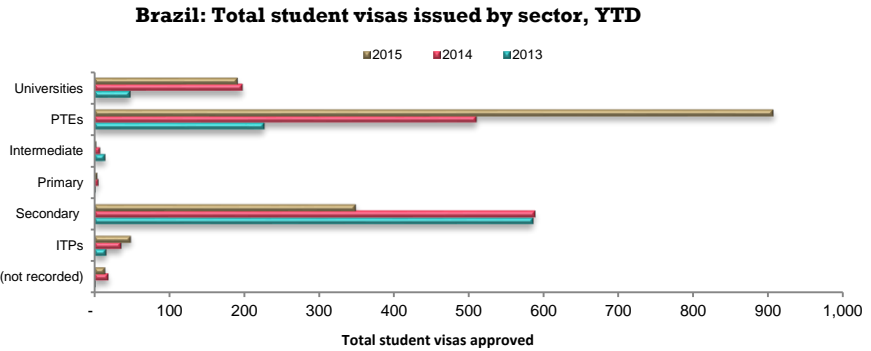
September RSV		September FSV		September TSV	
↑	5	29%	↑	53	98%
↑	58	82%			



Takeaways:

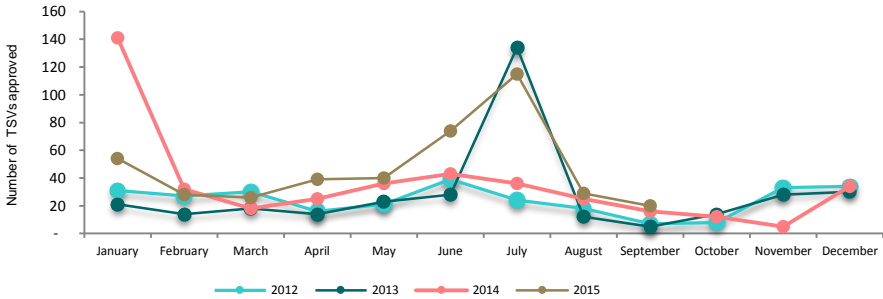
- Brazil experienced a strong September, with FSVs up 98% (53) and RSVs up 29% (5). YTD TSVs are up 11% (153).
- The PTE sector has shown strong growth YTD, up 78% (397). In contrast, the secondary school sector is down 40% (-238) YTD. This is driven by a reduction in the number of Pernambuco students arriving in July 2015, compared to July 2014.

YTD RSV		YTD FSV		YTD TSV	
↑	83	46%	↑	70	6%
↑	153	11%			

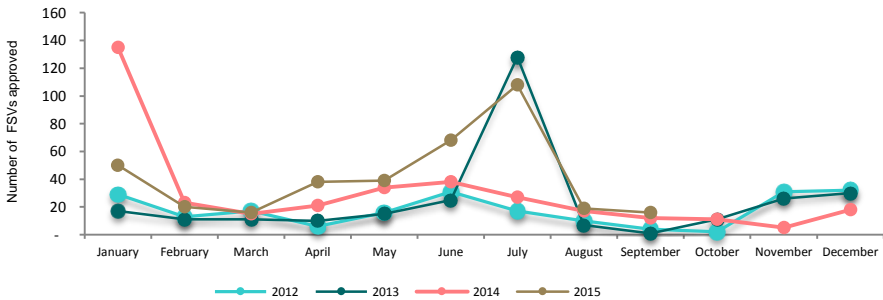


September RSV		September FSV		September TSV	
➡ 0	0%	⬆ 4	33%	⬆ 4	25%

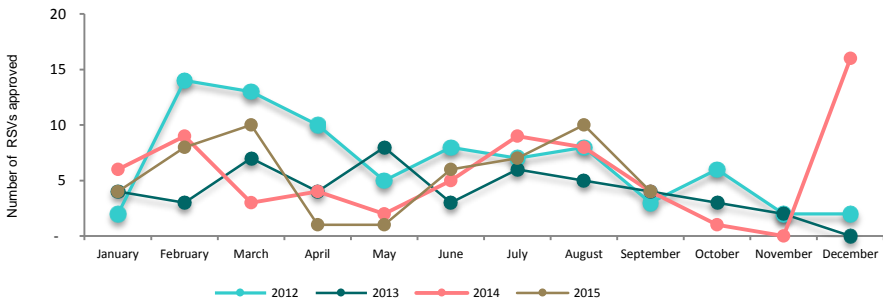
Chile: Total student visas (TSV), 2012 - 2015



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



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

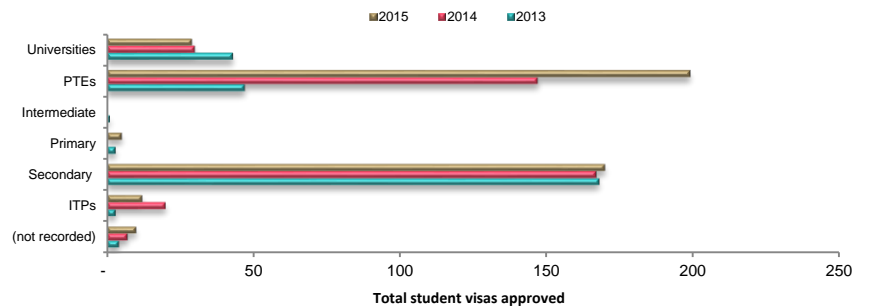


Takeaways:

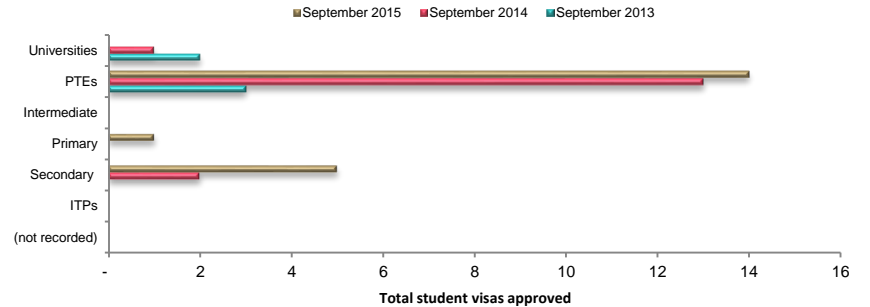
- YTD TSVs are up 14% (53), driven by a 16% (52) increase in FSVs.
- September's TSVs are up 25% (4), driven by an 33% (4) increase in FSVs.
- YTD, the PTE sector has experienced strong growth in TSVs, up 35% (52).

YTD RSV		YTD FSV		YTD TSV	
⬆ 1	2%	⬆ 52	16%	⬆ 53	14%

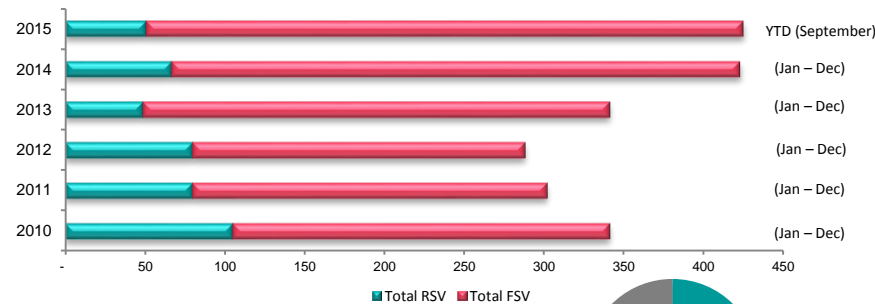
Chile: Total student visas issued by sector, YTD



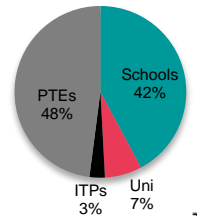
Chile: Total student visas issued by sector, September









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



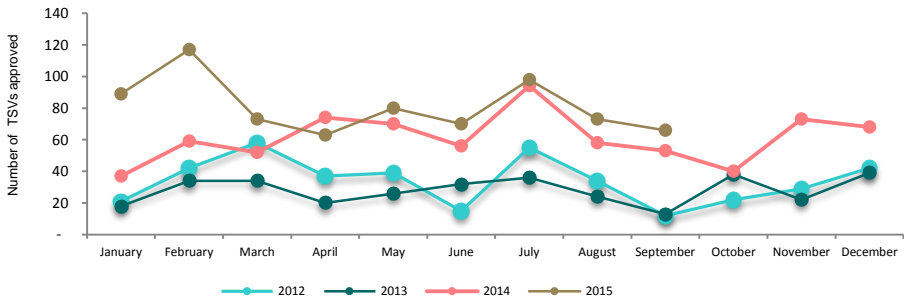
YTD 2015 sector breakdown of TSVs



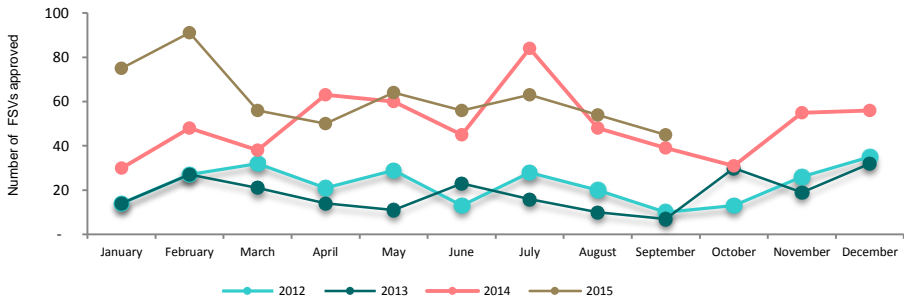
September RSV			September FSV			September TSV		
	7	50%		6	15%		13	25%

YTD RSV			YTD FSV			YTD TSV		
	77	79%		99	22%		176	32%

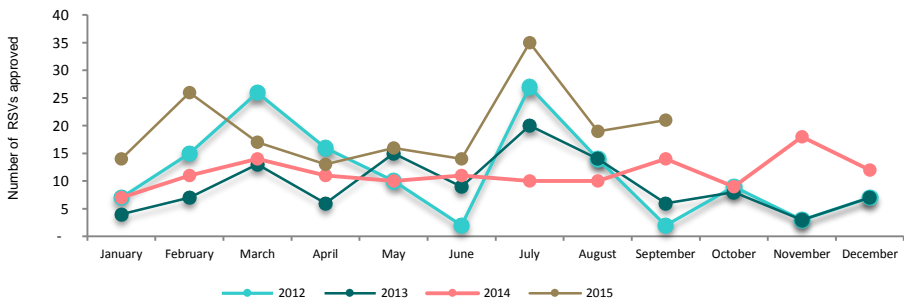
Colombia: Total student visas (TSV), 2012 - 2015



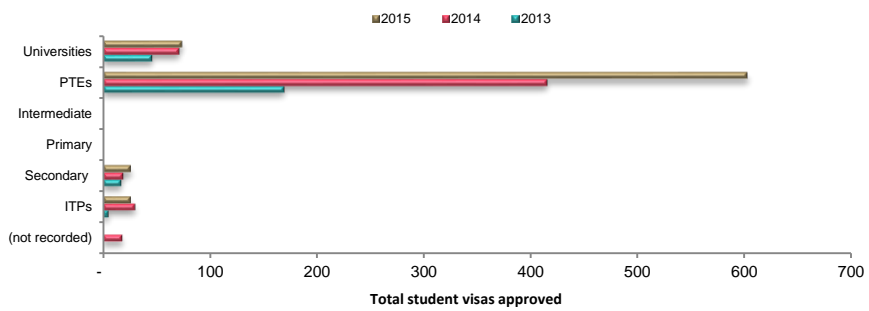
Colombia: First time student visas (FSV), 2012 - 2015



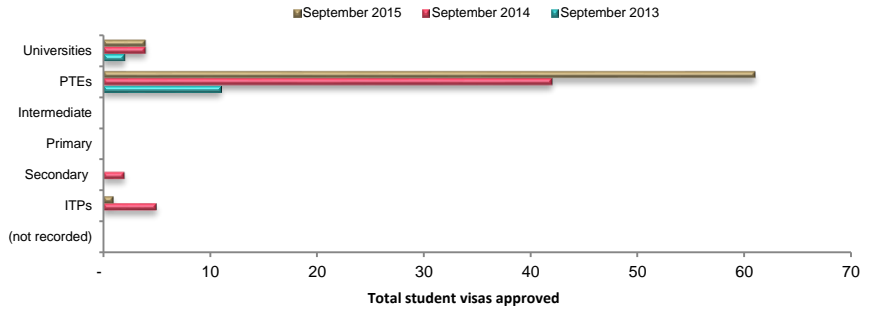
Colombia: Renewed student visas (RSV), 2012 - 2015



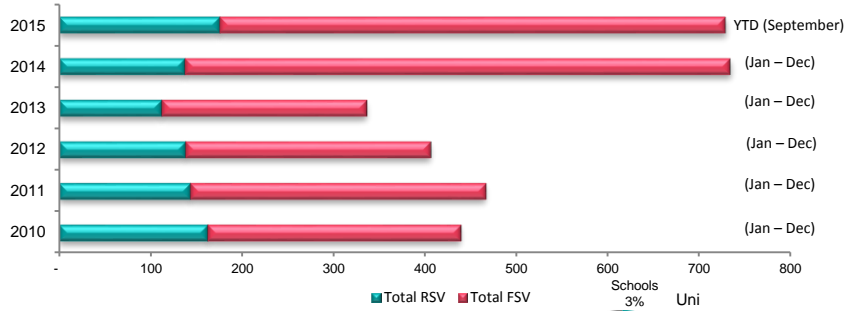
Colombia: Total student visas issued by sector, YTD



Colombia: Total student visas issued by sector, September



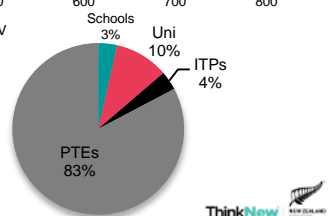
Colombia: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

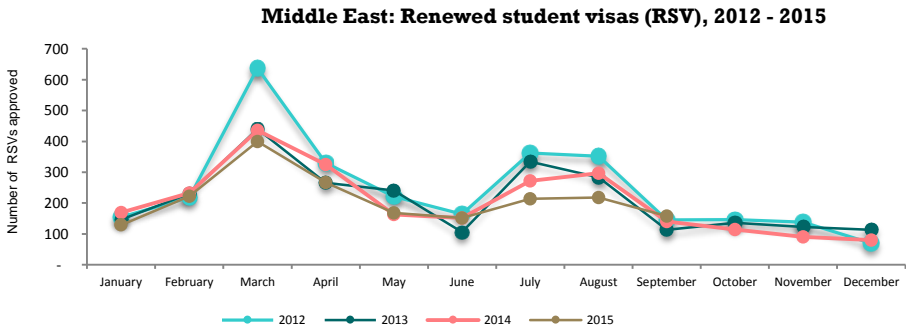
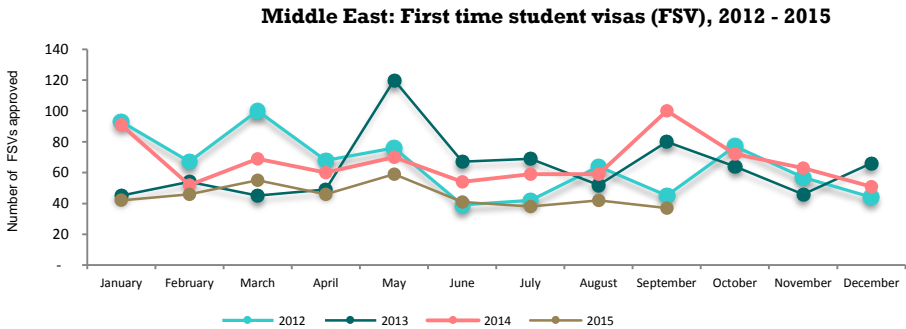
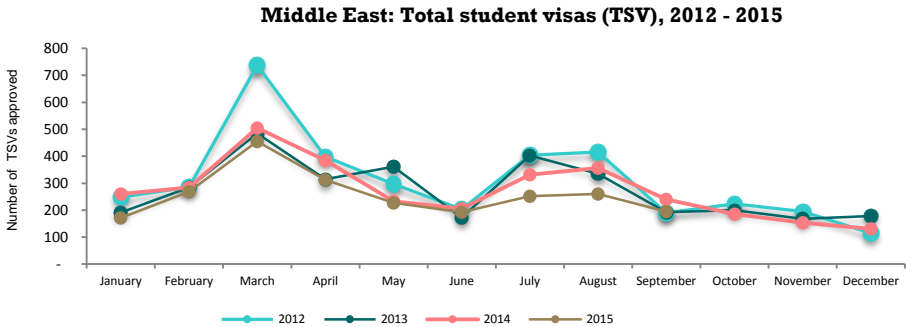
- Colombia had a strong September, up 15% (6) in FSVs and 50% in RSVs. This continues a positive yearly trend, with a 32% growth in TSVs YTD.
- Colombian PTEs are responsible for the majority of TSV growth, up 45% (188) YTD and 45% (19) within September.

YTD 2015 sector breakdown of TSVs



Middle East:

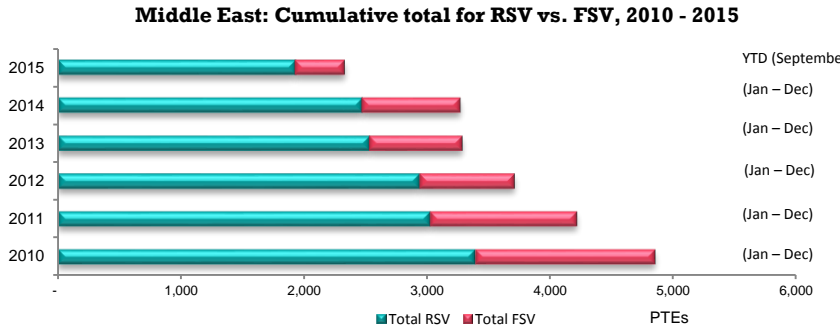
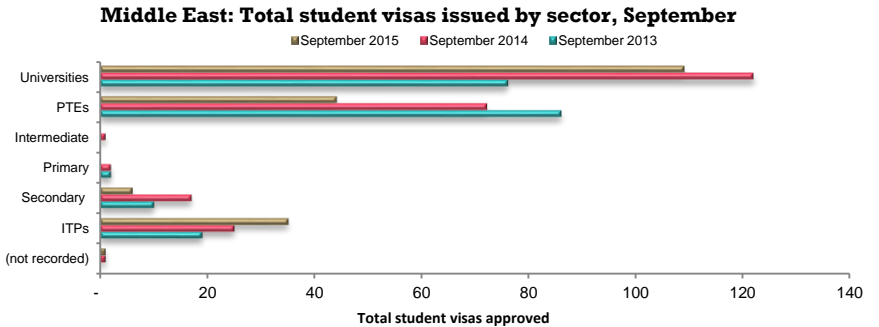
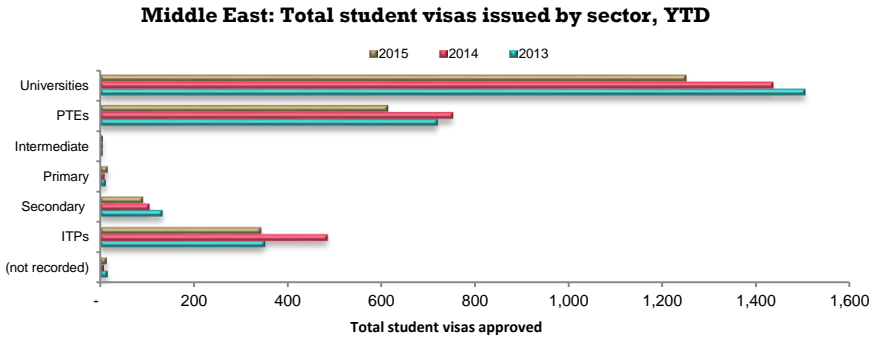
September RSV		September FSV		September TSV	
↑ 18	13%	↓ -63	-63%	↓ -45	-19%



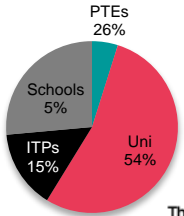
- Takeaways:
- This market continues to experience negative results.
 - Whilst FSVs declined by 63% in September, RSVs increased by 13% (18).

YTD (January to September)

YTD RSV		YTD FSV		YTD TSV	
↓ -258	-12%	↓ -208	-34%	↓ -466	-17%



YTD 2015 sector breakdown of TSVs



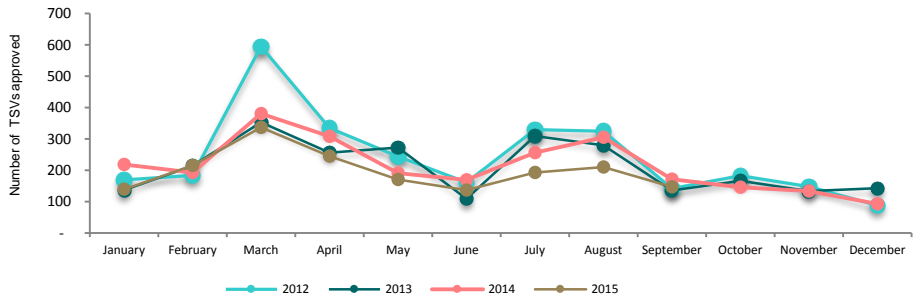
Saudi Arabia:

YTD (January to September)

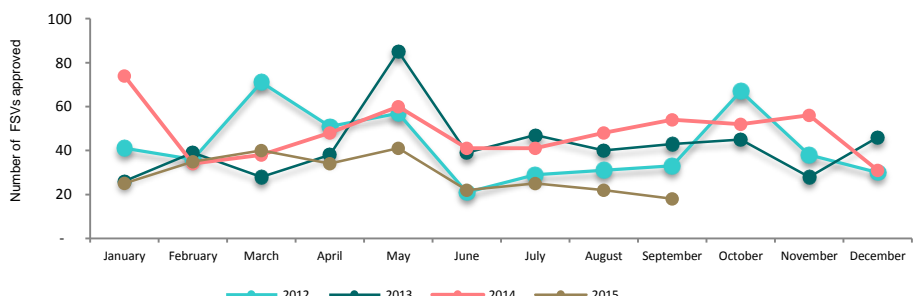
September RSV			September FSV		September TSV			
↑	12	10%	↓	-36	-67%	↓	-24	-14%

YTD RSV		YTD FSV		YTD TSV	
↓ -222	-13%	↓ -176	-40%	↓ -398	-18%

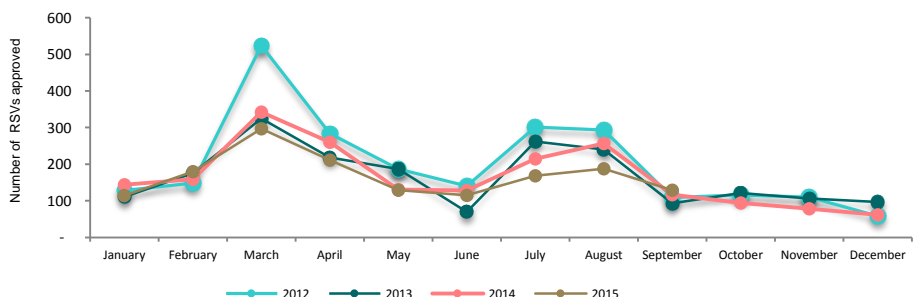
Saudi Arabia: Total student visas (TSV), 2012 - 2015



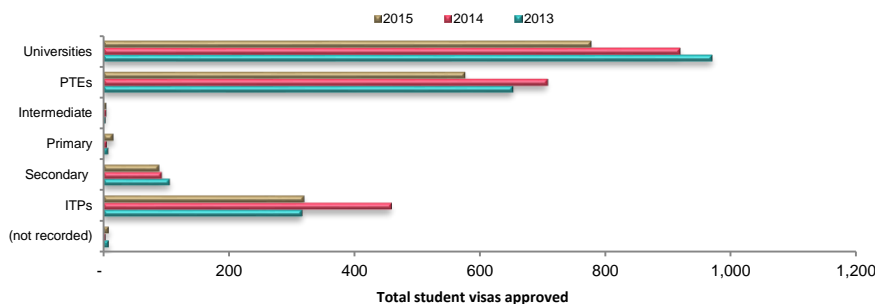
Saudi Arabia: First time student visas (FSV), 2012 - 2015



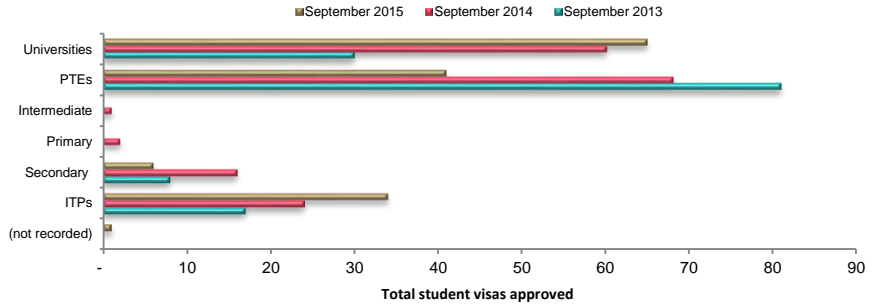
Saudi Arabia: Renewed student visas (RSV), 2012 - 2015



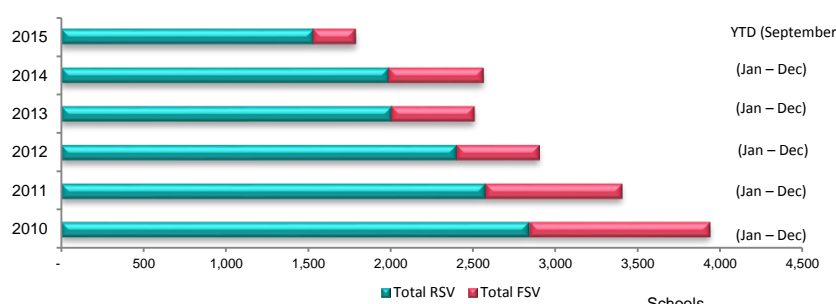
Saudi Arabia: Total student visas issued by sector, YTD



Saudi Arabia: Total student visas issued by sector, September

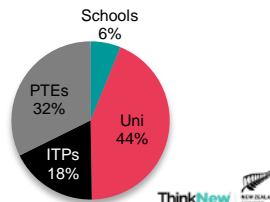


Saudi Arabia: Cumulative total for RSV vs. FSV, 2010 - 2015



- Takeaways:**
- This market continues to experience negative month-on-month results. September FSVs decreased by 67% (-36), although RSVs increased by 10% (12).
 - The decline is partly due to an anomaly in 2014, with a significant cohort of ITP visas processed in early 2014 as part of an additional King Abdullah Scholarship Programme – Technical Training allocation.

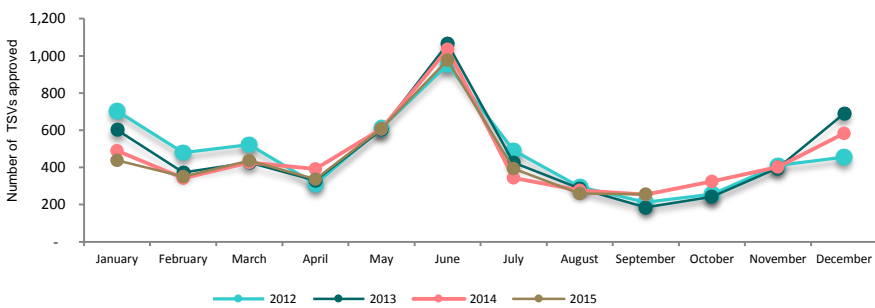
YTD 2015 sector breakdown of TSVs



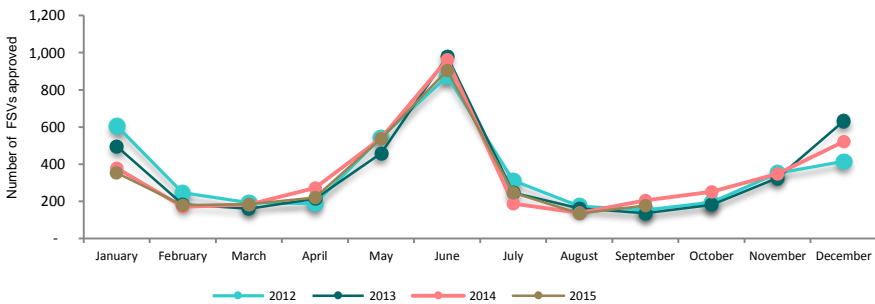
September RSV		September FSV		September TSV	
↑ 28	57%	↓ -27	-13%	↑ 1	0%

YTD RSV		YTD FSV		YTD TSV	
↓ -12	-1%	↓ -101	-3%	↓ -113	-3%

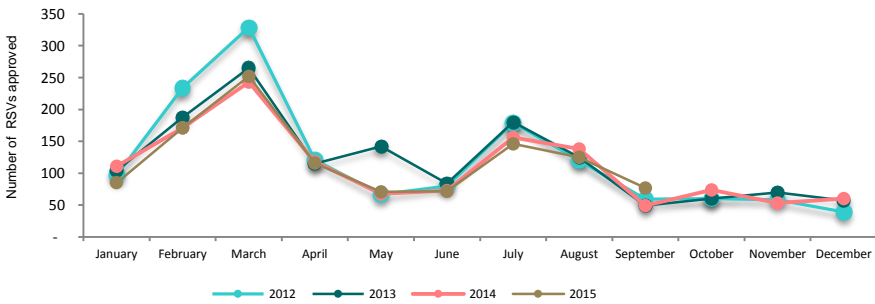
Europe: Total student visas (TSV), 2012 - 2015



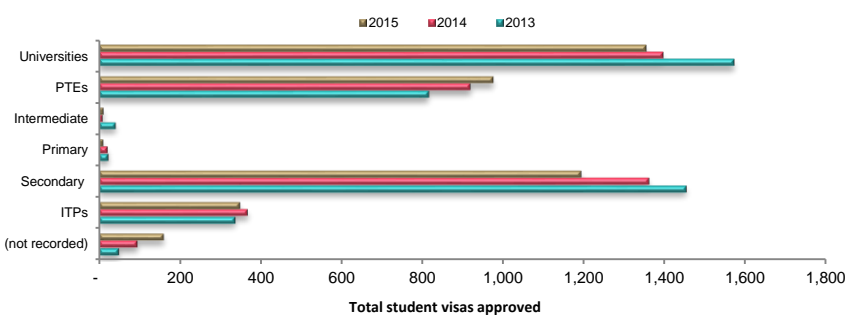
Europe: First time student visas (FSV), 2012 - 2015



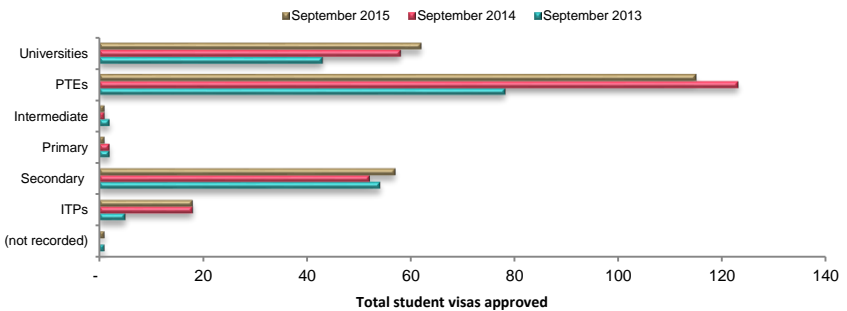
Europe: Renewed student visas (RSV), 2012 - 2015



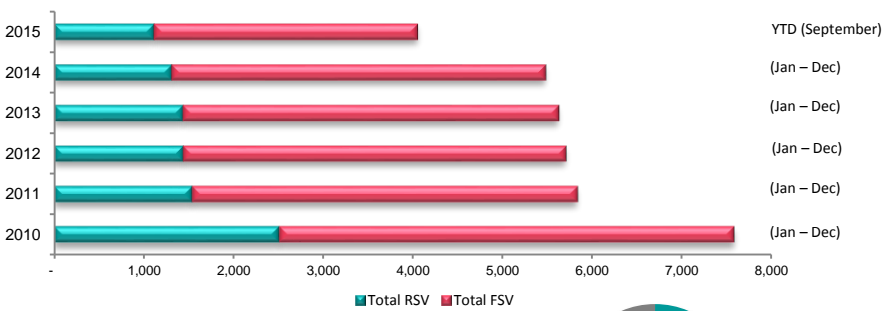
Europe: Total student visas issued by sector, YTD



Europe: Total student visas issued by sector, September



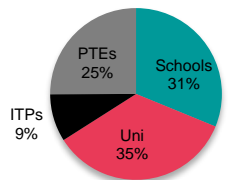
Europe: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- Europe shows a flat September, driven by a gain in RSVs, up 57% (28), equally offsetting a decline in FSVs, down 13% (-27).
- YTD Europe is substantially flat, down 3% (-113) in TSVs. Gains in the PTE sector have offset declines in universities and secondary schools.

YTD 2015 sector breakdown of TSVs



Germany:

YTD (January to September)

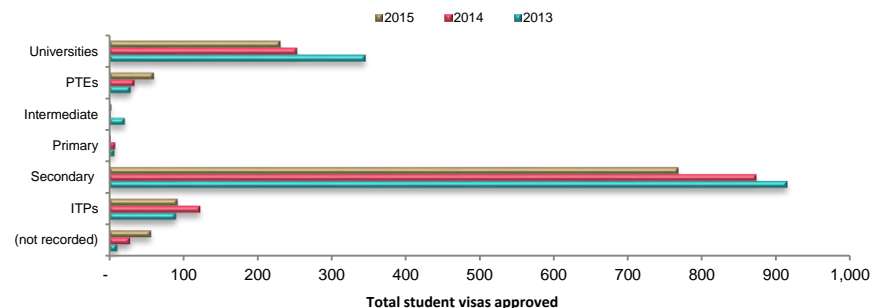
September RSV			September FSV		September TSV			
↑	4	67%	↑	2	5%	↑	6	12%

YTD RSV		YTD FSV		YTD TSV	
↓ -28	-13%	↓ -82	-7%	↓ -110	-8%

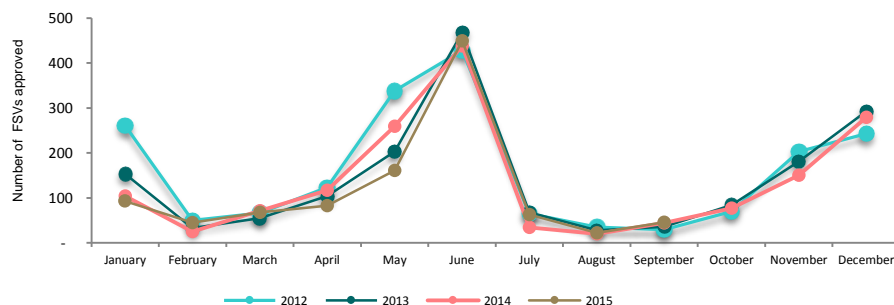
Germany: Total student visas (TSV), 2012 - 2015



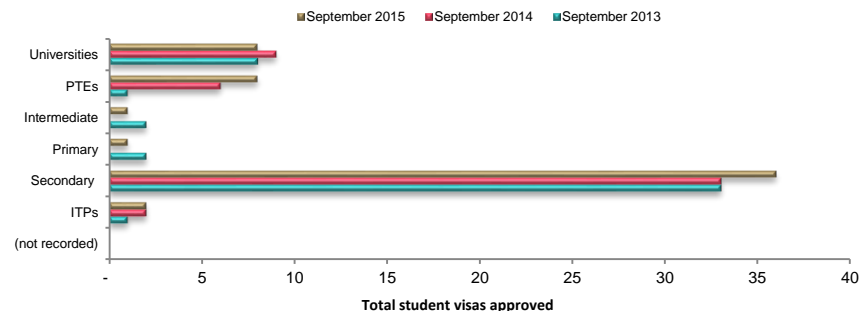
Germany: Total student visas issued by sector, YTD



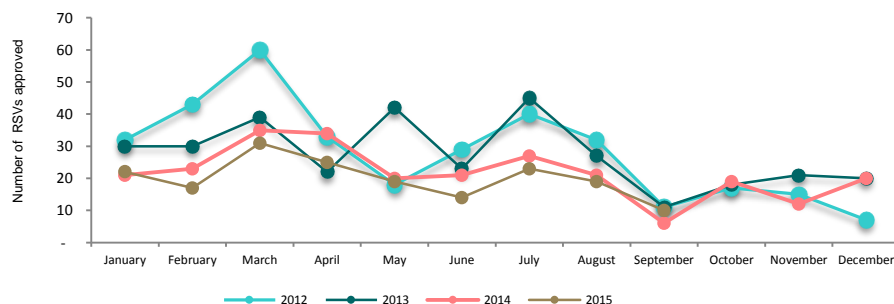
Germany: First time student visas (FSV), 2012 - 2015



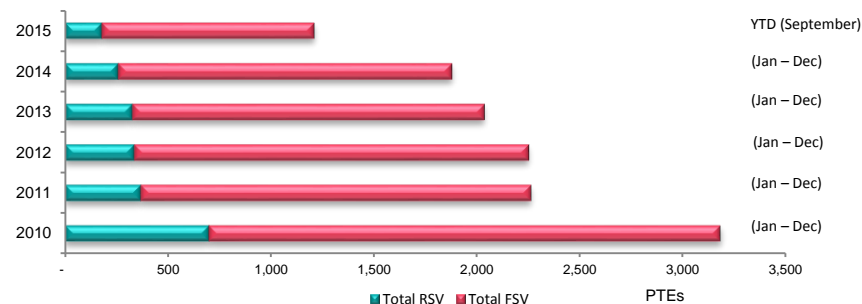
Germany: Total student visas issued by sector, September



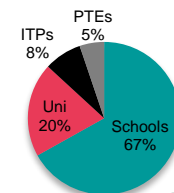
Germany: Renewed student visas (RSV), 2012 - 2015



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



YTD 2015 sector breakdown of TSVs



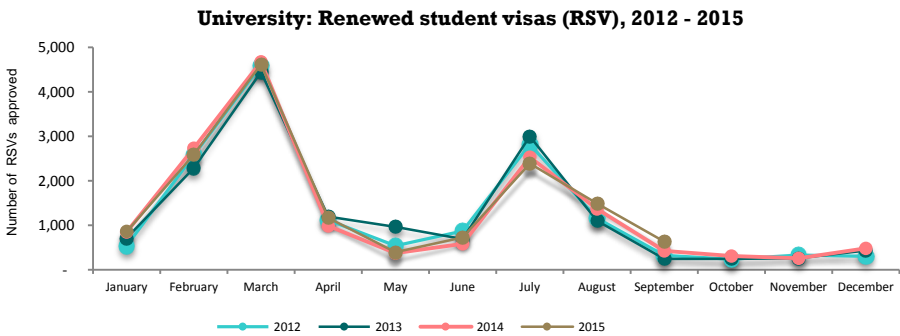
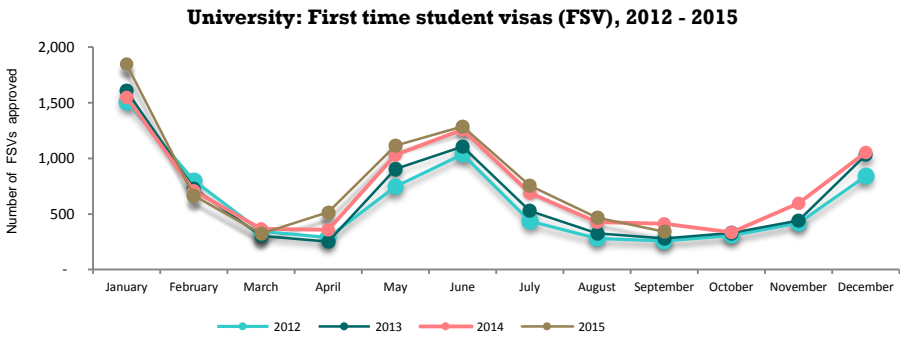
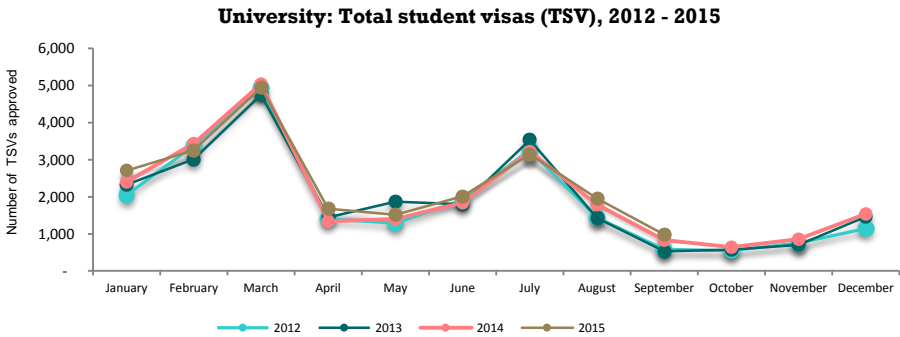
Takeaways:

- Germany's YTD trend has so far been negative, with FSVs down 7% (-82) and TSVs down 13% (-28).
- September delivered a positive result, with RSVs up 67% (4) and FSVs up 5% (2).
- Secondary schools are down 12% in TSVs YTD.

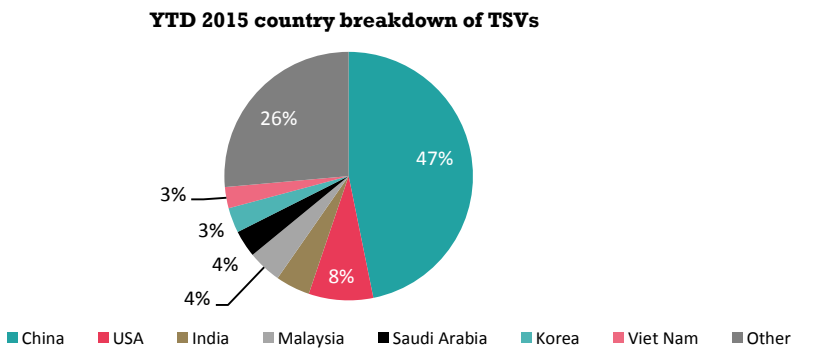
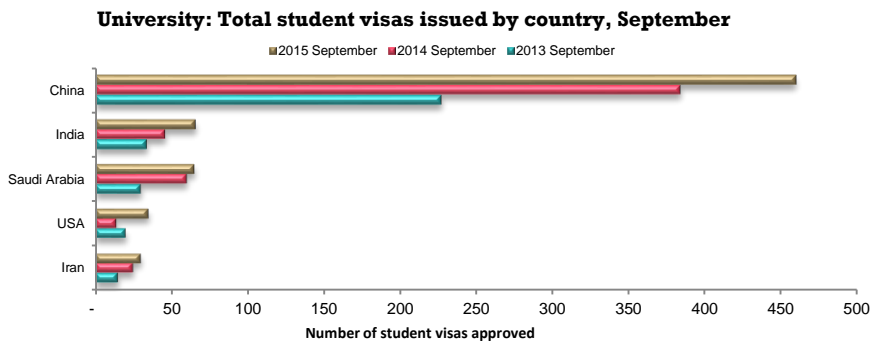
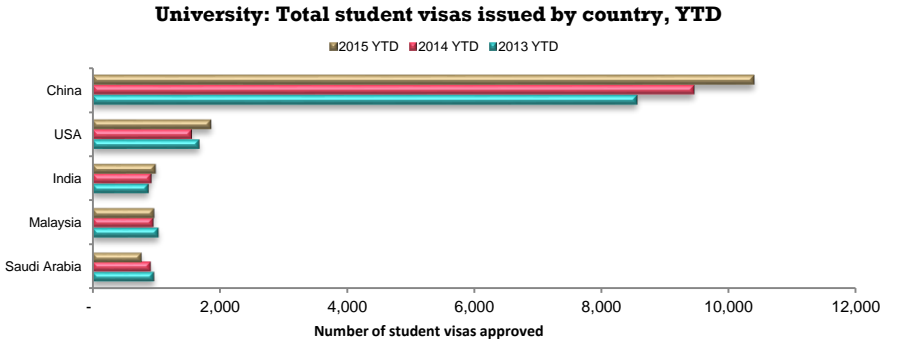
Overall: Sector overview

Universities:

September RSV		September FSV		September TSV	
↑ 211	50%	↓ -72	-17%	↑ 139	17%



YTD RSV		YTD FSV		YTD TSV	
↑ 336	2%	↑ 514	8%	↑ 850	4%



Takeaways:

- YTD, China comprises 47% of all university visas.
- China and the USA continue to show strong growth in the university market, together increasing 1,234 TSVs YTD.
- September was a strong month for RSVs, up 50% (211), but a weak month for FSVs, down 17% (-72).

Private Training Establishments (PTE):

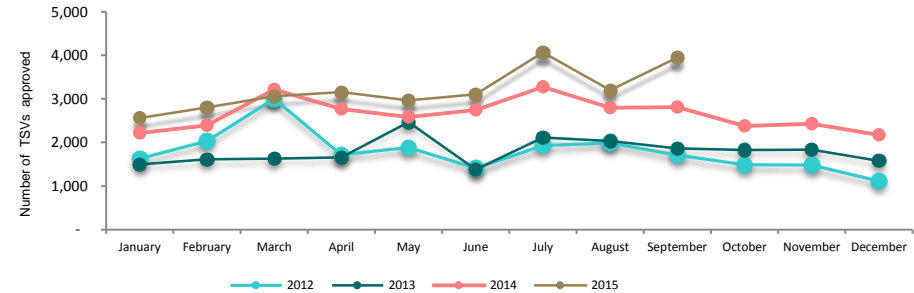


YTD (January to September)

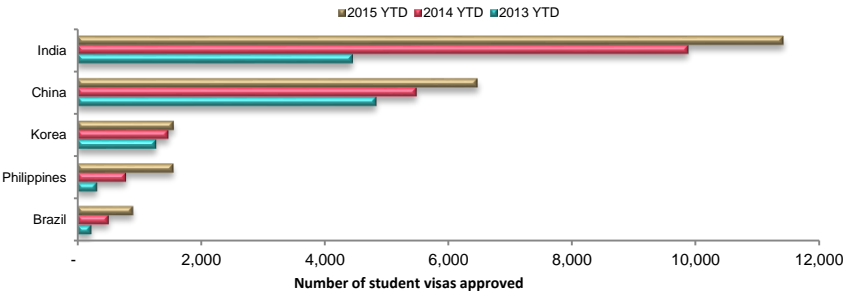
September RSV		September FSV		September TSV	
↑ 645	60%	↑ 496	29%	↑ 1,141	41%

YTD RSV		YTD FSV		YTD TSV	
↑ 2,867	28%	↑ 1,203	8%	↑ 4,070	16%

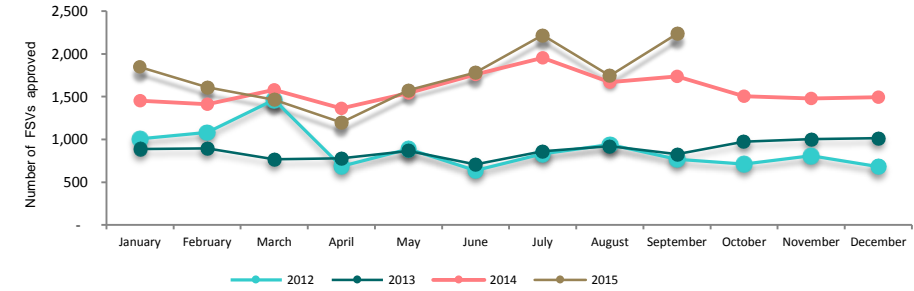
PTE: Total student visas (TSV), 2012 - 2015



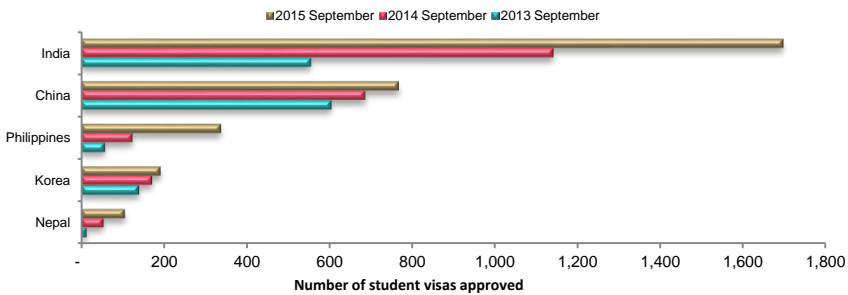
PTE: Total student visas issued by country, YTD



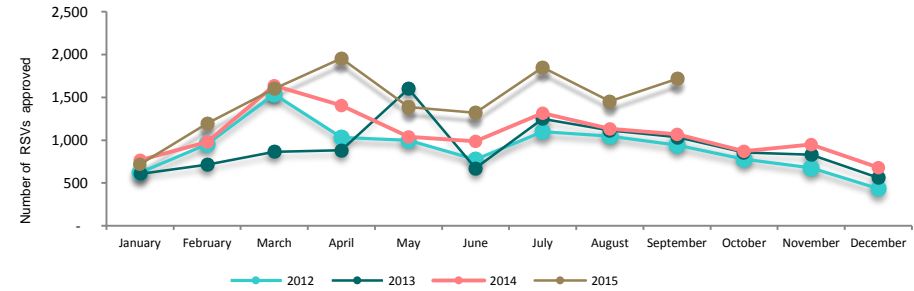
PTE: First time student visas (FSV), 2012 - 2015



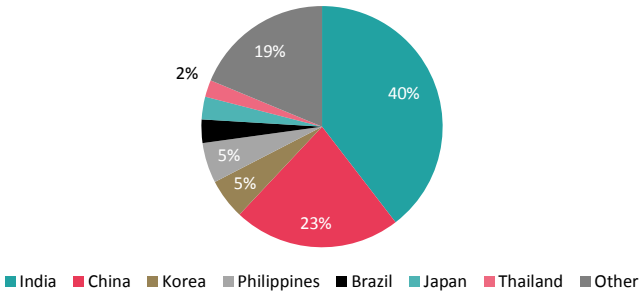
PTE: Total student visas issued by country, September



PTE: Renewed student visas (RSV), 2012 - 2015



YTD 2015 country breakdown of TSVs



Takeaways:

- YTD TSVs are growing strongly, up 16% (4,070), with 70% (2,867) of the growth driven by RSVs.
- FSV PTE growth was driven by India and China, together comprising 63% of total YTD growth.
- September was a particularly strong month for PTEs, with FSVs increasing 29% (496) and RSVs gaining 60% (645).

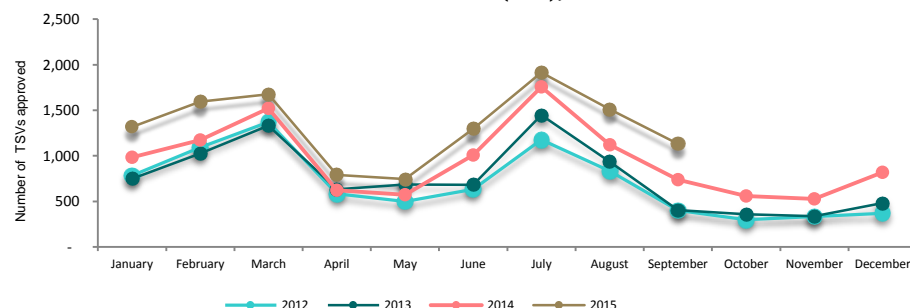
Institutes of Technology and Polytechnics (ITPs):

YTD (January to September)

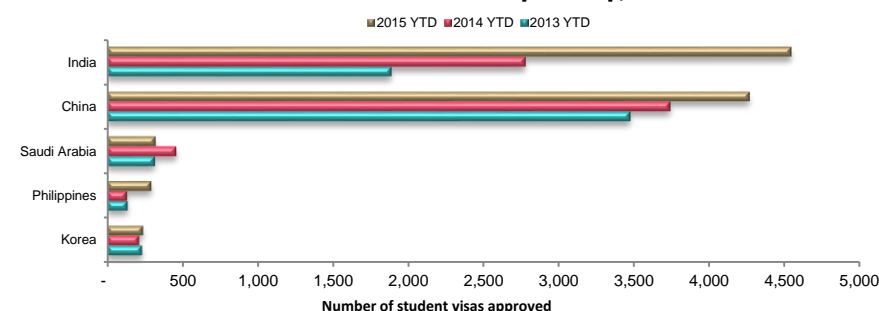
September RSV		September FSV		September TSV	
↑ 234	72%	↑ 160	39%	↑ 394	54%

YTD RSV		YTD FSV		YTD TSV	
↑ 693	13%	↑ 1,792	45%	↑ 2,485	26%

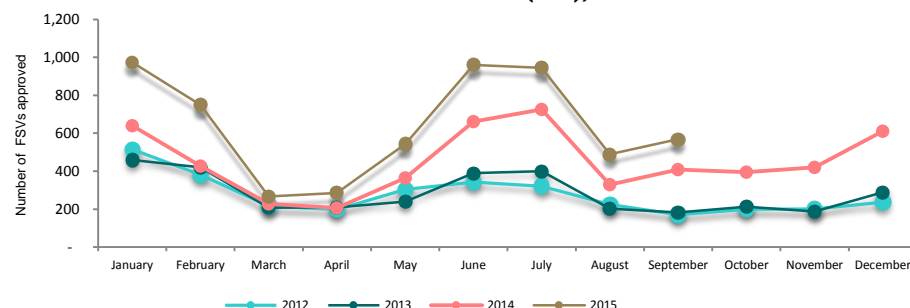
ITP: Total student visas (TSV), 2012 - 2015



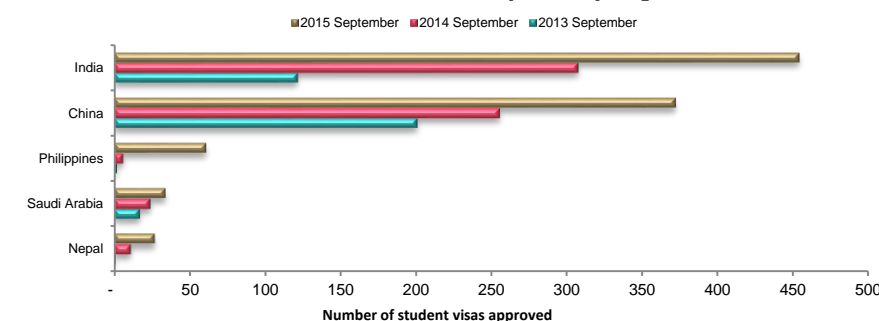
ITP: Total student visas issued by country, YTD



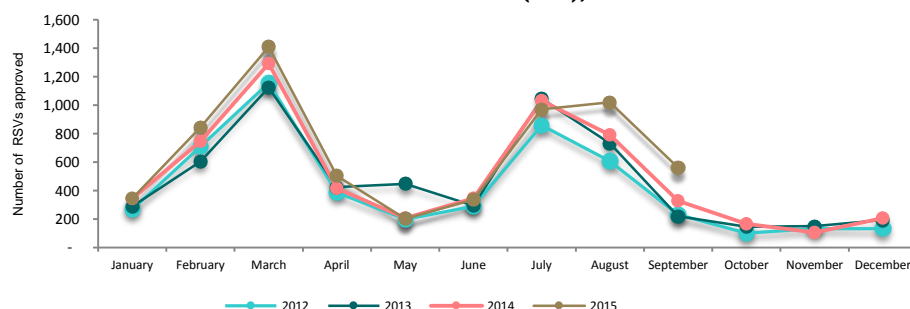
ITP: First time student visas (FSV), 2012 - 2015



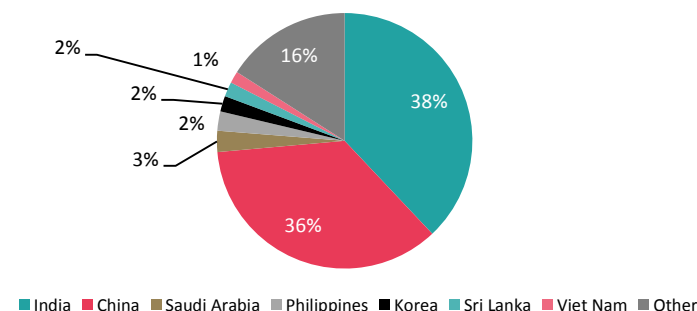
ITP: Total student visas issued by country, September



ITP: Renewed student visas (RSV), 2012 - 2015






YTD 2015 country breakdown of TSVs



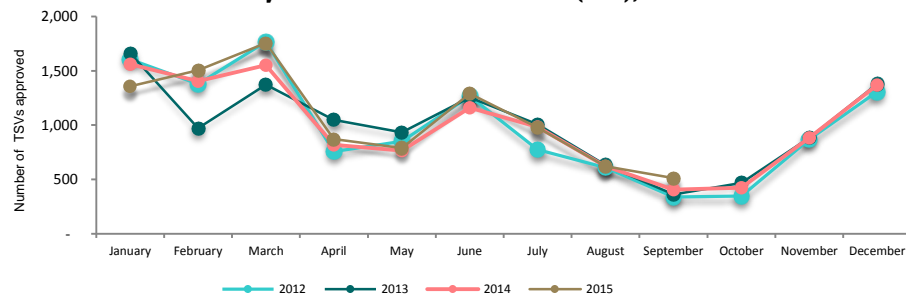
Takeaways:

- YTD TSVs are growing strongly, up 26% (2,485). Over 70% of this growth is driven by FSVs, up 45% (1,792).
- India and China share 74% of all ITP TSVs year to date.
- September was an exceptionally strong month for ITPs, with FSVs gaining 39% (160) and RSVs increasing by 72% (234).

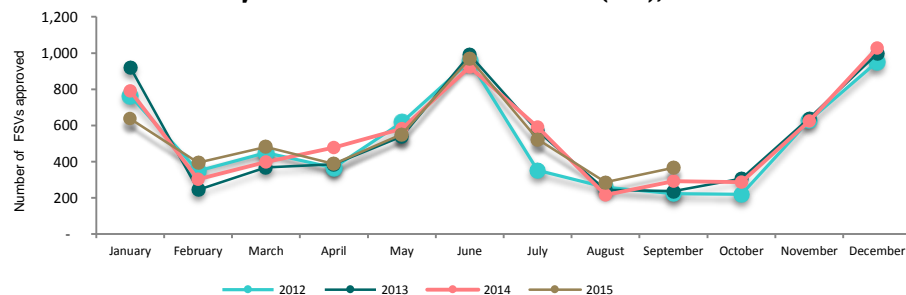
Secondary schools:

September RSV		September FSV		September TSV	
	32	28%		73	25%
	105	26%			

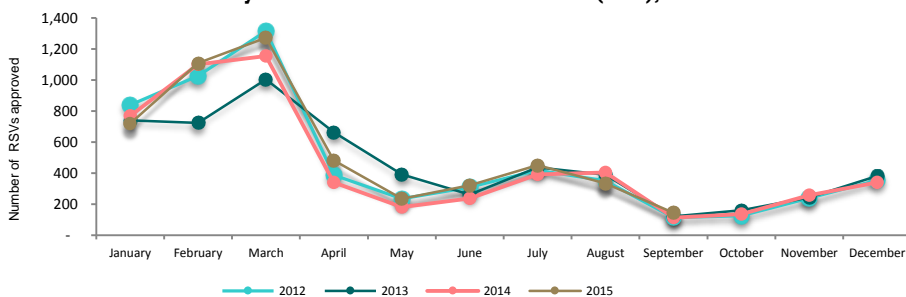
Secondary Schools: Total student visas (TSV), 2012 - 2015






Secondary Schools: First time student visas (FSV), 2012 - 2015

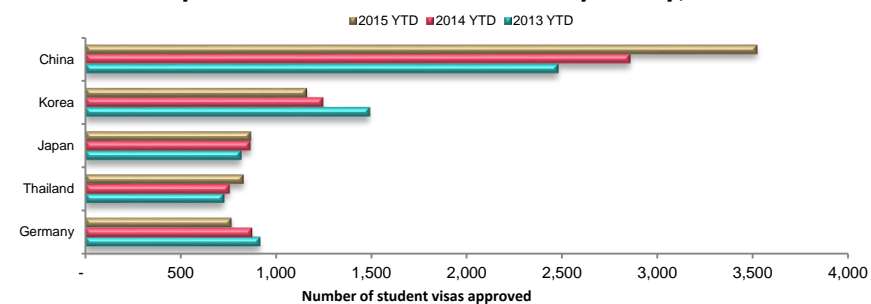


Secondary Schools: Renewed student visas (RSV), 2012 - 2015

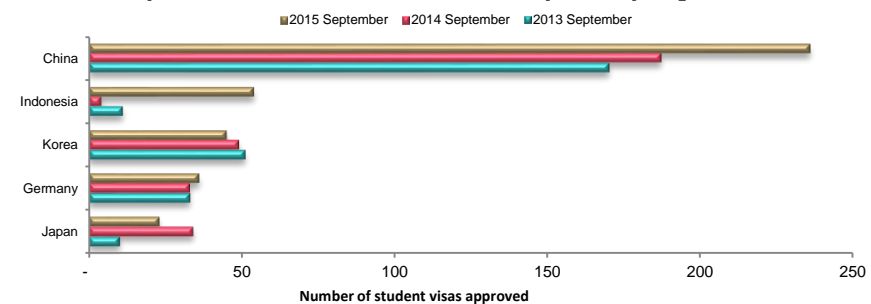


YTD RSV		YTD FSV		YTD TSV	
	384	8%		20	0%
	404	4%			

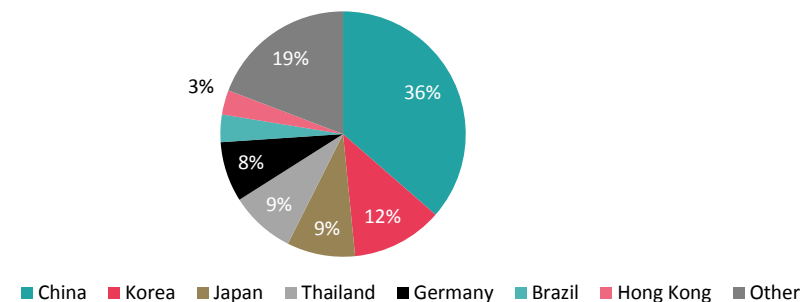
Secondary Schools: Total student visas issued by country, YTD



Secondary Schools: Total student visas issued by country, September



YTD 2015 country breakdown of TSVs



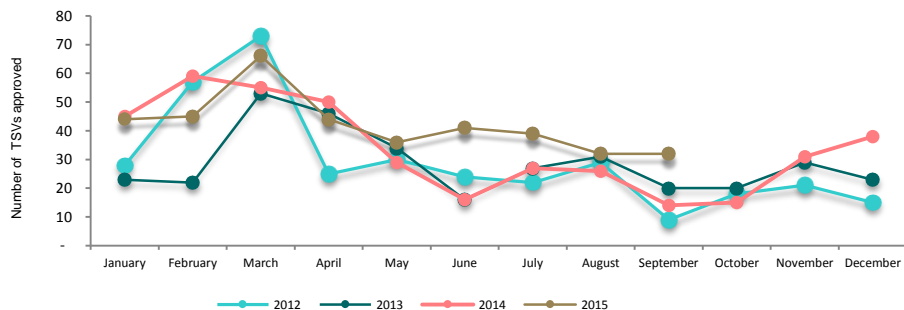
Takeaways:

- YTD TSVs are tracking flat, up 4% (404).
- September has been a strong month, with FSVs up 25% (73) and RSVs up 28% (32).
- China is the largest contributor of TSVs YTD, with 36% of total.

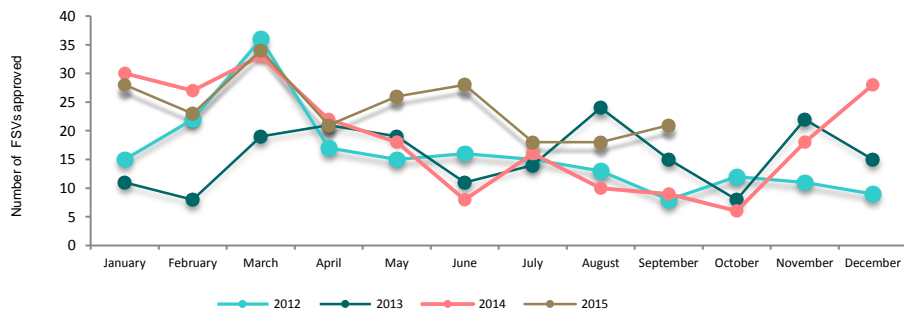
Primary schools:

September RSV		September FSV		September TSV	
↑ 6	120%	↑ 12	133%	↑ 18	129%

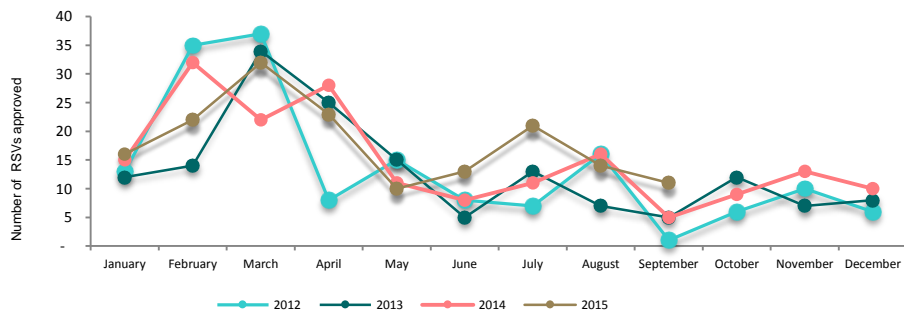
Primary School: Total student visas (TSV), 2012 - 2015



Primary School: First time student visas (FSV), 2012 - 2015

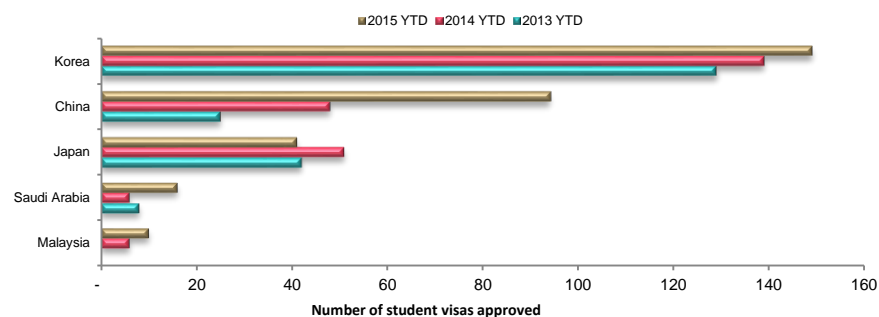


Primary School: Renewed student visas (RSV), 2012 - 2015

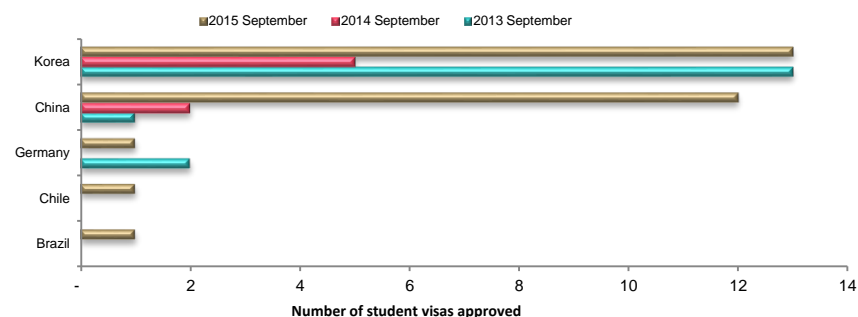


YTD RSV		YTD FSV		YTD TSV	
↑ 14	9%	↑ 44	25%	↑ 58	18%

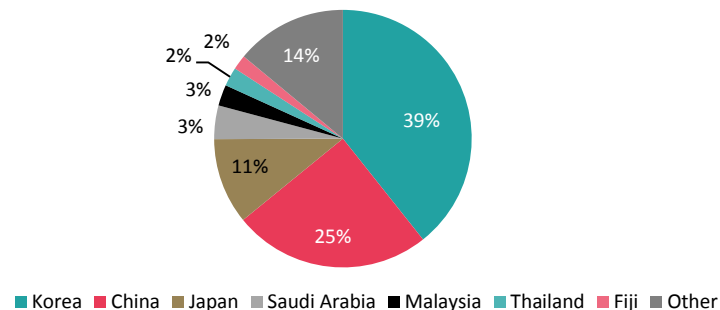
Primary School: Total student visas issued by country, YTD



Primary School: Total student visas issued by country, September






YTD 2015 country breakdown of TSVs



Takeaways:

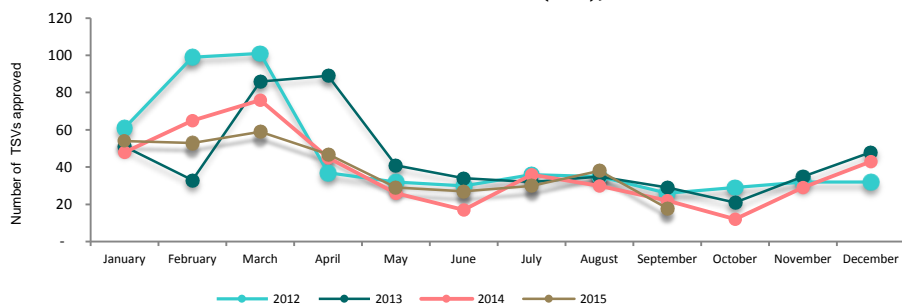
- YTD TSVs are growing strongly, up 18% (58). Both FSVs and RSVs are tracking positively, up 9% (14) and 25% (44) respectively.
- September delivered a particularly strong month, with FSVs increasing by 133% and RSVs increasing by 120%.
- Korea is the largest market for primary schools, comprising 39% of TSVs YTD; the next largest market is China, with 25%.

Intermediate schools:

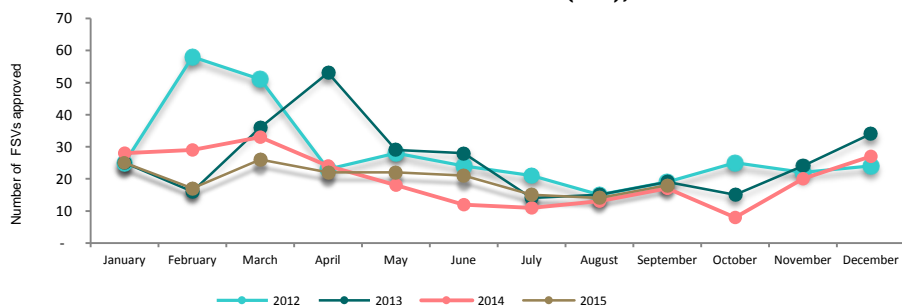
September RSV		September FSV		September TSV	
 -5	-100%	 1	6%	 -4	-18%

YTD RSV		YTD FSV		YTD TSV	
 -5	-3%	 -5	-3%	 -10	-3%

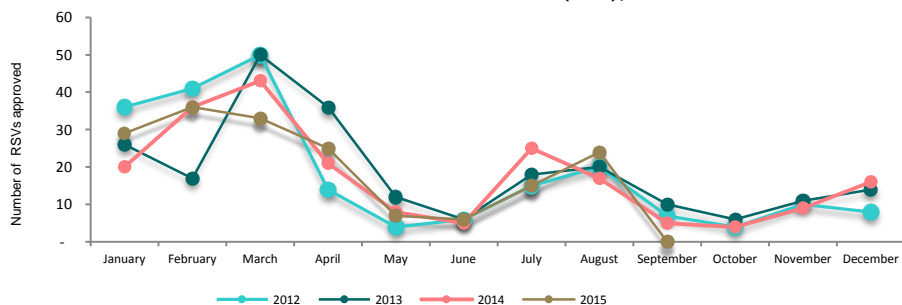
Intermediate: Total student visas (TSV), 2012 - 2015



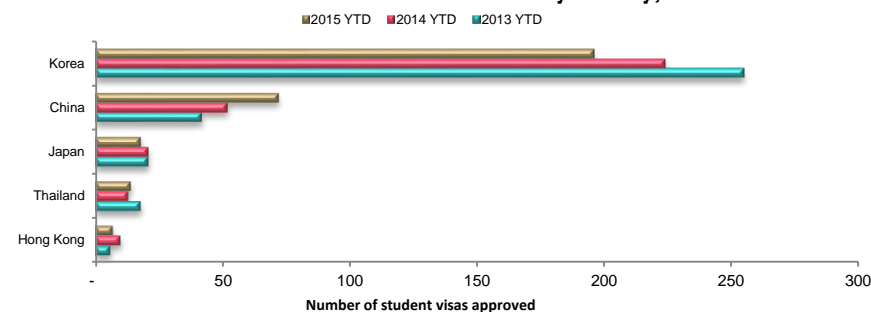
Intermediate: First time student visas (FSV), 2012 - 2015



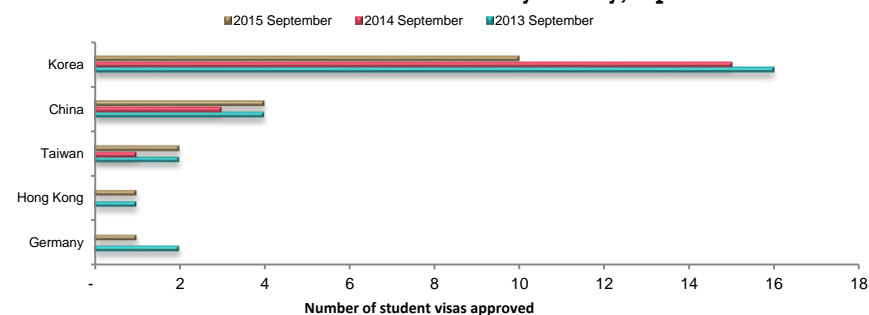
Intermediate: Renewed student visas (RSV), 2012 - 2015



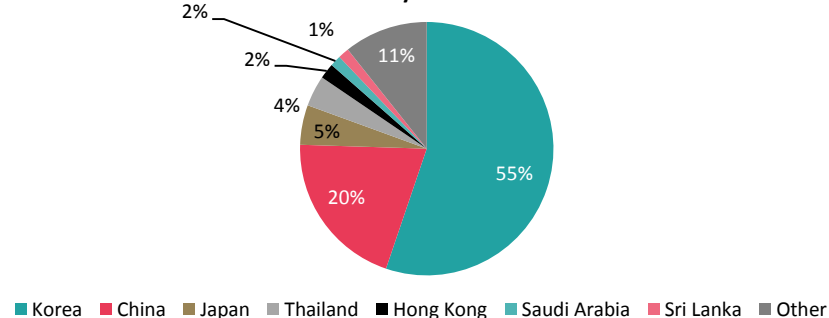
Intermediate: Total student visas issued by country, YTD



Intermediate: Total student visas issued by country, September



YTD 2015 country breakdown of TSVs



Takeaways:

- YTD TSVs are tracking flat, down 3% (-10).
- September has seen an 18% (-4) decline in TSVs, driven by a 100% (-5) decline in RSVs.
- Korea has contributed 55% of all YTD TSVs for intermediate schools.