

Student Visa Dashboard

November 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 in 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

- **Measure:**
 - The Dashboard measures the volume of student visas approved between 1 January to the end of the month specified on the cover page.
- **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

Name of the market/region

Indicator of the overall performance of the market

- The monthly result:
- Actual change in visa numbers
 - Percentage change in visas
 - Directional indicator

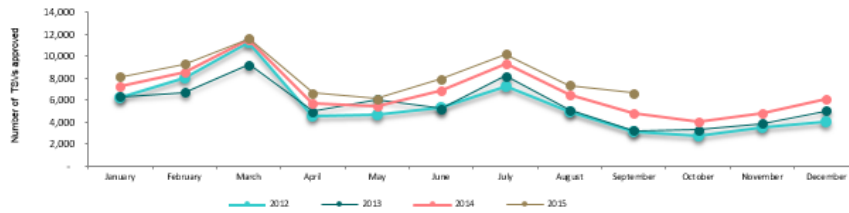
Overall:

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

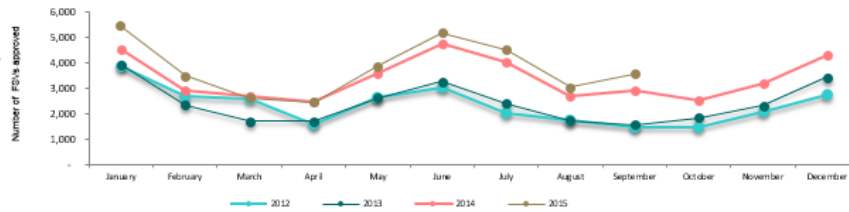
YTD RSV		YTD FSV		YTD TSV	
↑ 4,276	12%	↑ 3,646	12%	↑ 7,922	12%

- The year-to-date result:
- Actual change in visa numbers
 - Percentage change in visas
 - Directional indicator

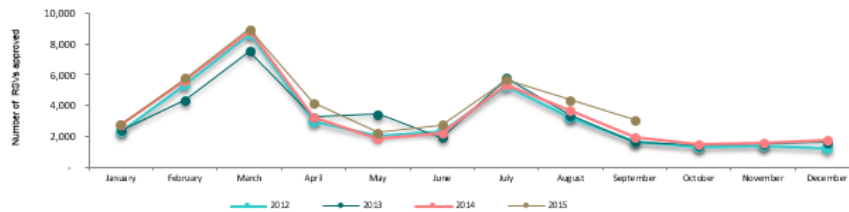
Overall: Total student visas (TSV), 2012 - 2015



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



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



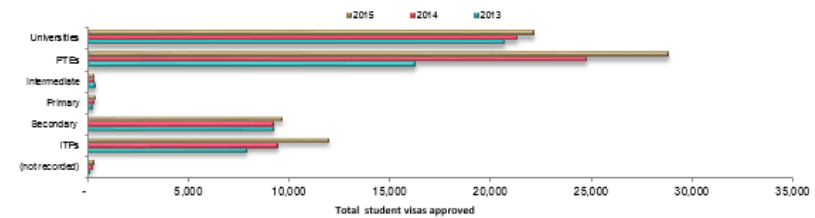
These graphs show a monthly trend of actual visa numbers from 2011 - 2015.

Key or interesting trends to consider

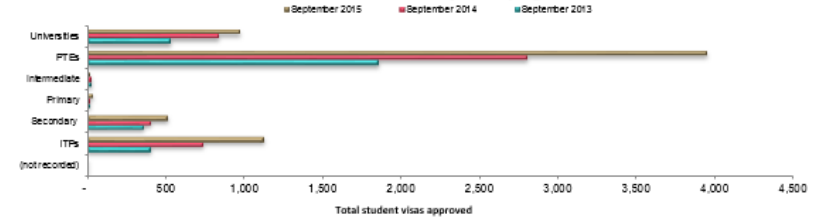
Takeaways:

- 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.

Overall: Total student visas issued by sector, YTD



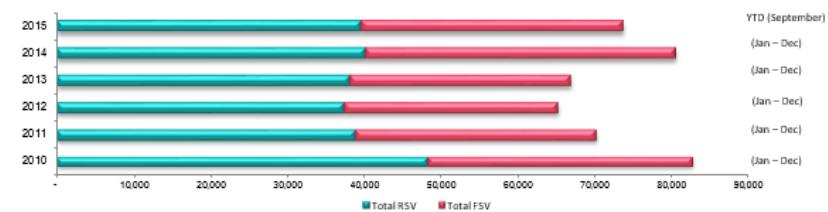
Overall: Total student visas issued by sector, September



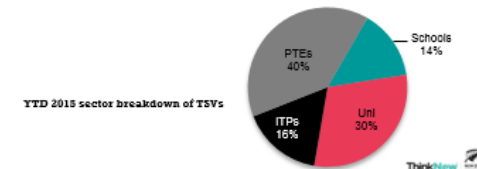
Shows the year-end sector performance of actual TSV numbers.

Shows the monthly sector performance of actual TSV numbers.

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



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.



This pie graph represents the sector distribution of TSVs YTD.

Key trends

Year-to-date (YTD)

- Year-to-date total student visas (TSV) are up 13% (9,727) and first time student visas (FSV) are up 12% (4,357). Returning student visas are up 14% (5,370).
- YTD growth in TSVs has been driven by India, China, the Philippines, the USA, and Brazil.
- The ITPs, PTEs, and universities have experienced the strongest YTD growth in FSVs, up 41% (1,952), 9% (1,513), and 8% (649).

November

- November student visa approvals were up 9% (435) increase in TSVs and only a 4% (120) increase in FSVs, on 2014.
- November TSV growth was driven by China, the USA, Brazil, Thailand and India.
- All sectors experienced growth in TSVs in November except for primary schools.

Increases	TSVs for November	Change	% change
	China	196	15%
	USA	103	114%
	Brazil	52	79%
	Thailand	51	76%
	India	44	3%

Austria	-16	-53%
Philippines	-29	-19%
Viet Nam	-40	-38%
Saudi Arabia	-54	-40%
Japan	-58	-20%

Increases	FSVs for November	Change	% change
	USA	104	133%
	China	71	11%
	Brazil	59	126%
	Thailand	56	181%
	Malaysia	39	177%

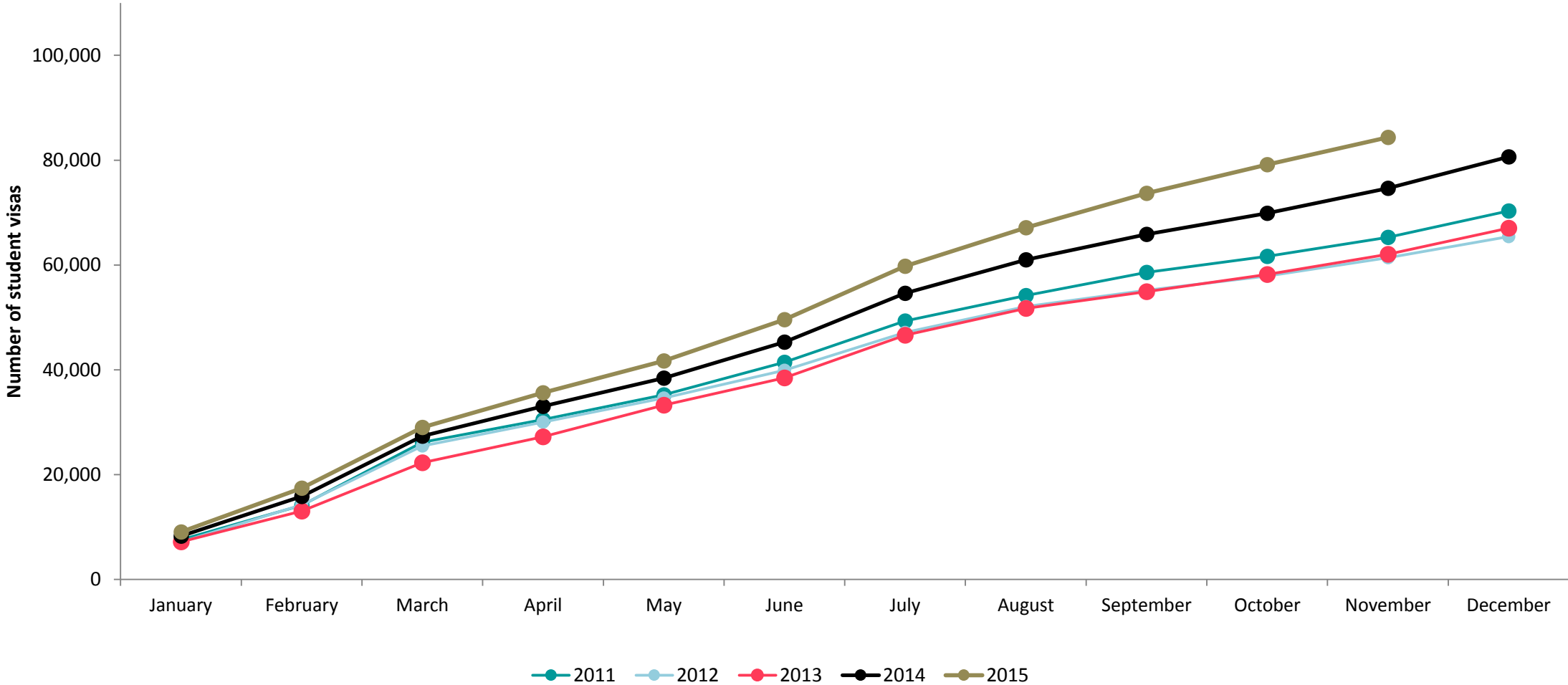
Saudi Arabia	-28	-50%
Philippines	-37	-36%
Viet Nam	-38	-49%
Japan	-57	-24%
India	-103	-11%

Sector TSVs for November	Change	% change
Universities	216	25%
Secondary	76	9%
ITPs	73	14%
PTEs	59	2%
Intermediate	3	10%
Primary	-5	-16%

Sector FSVs for November	Change	% change
Universities	106	18%
Secondary	48	8%
ITPs	12	3%
Primary	-3	-17%
Intermediate	-8	-40%
PTEs	-46	-3%

Tracker

Cumulative total



Takeaways:

- 2015 is tracking strongly above previous years and TSVs are up 13% (9,727) YTD.

Overall performance

Top 20 markets (in order of 2015 volume)

Indicator	YTD TSVs	2014	2015	Change in numbers	% change
●	China	24,031	27,771	3,740	16%
●	India	16,245	20,092	3,847	24%
●	Korea	4,640	4,537	-103	-2%
●	Japan	2,903	2,852	-51	-2%
●	Philippines	1,318	2,555	1,237	94%
●	USA	1,886	2,298	412	22%
●	Thailand	2,075	2,127	52	3%
●	Saudi Arabia	2,471	1,981	-490	-20%
●	Brazil	1,494	1,747	253	17%
●	Viet Nam	1,571	1,510	-61	-4%
●	Germany	1,578	1,438	-140	-9%
●	Malaysia	1,299	1,373	74	6%
●	Hong Kong	1,019	1,060	41	4%
●	Sri Lanka	664	880	216	33%
●	Colombia	666	865	199	30%
●	Fiji	860	795	-65	-8%
●	Taiwan	819	794	-25	-3%
●	Nepal	774	729	-45	-6%
●	Indonesia	622	713	91	15%
●	Russia	596	596	0	0%
	Grand Total	74,627	84,354	9,727	13%

Indicator	YTD FSVs	2014	2015	Change in numbers	% change
●	India	11,152	12,137	985	9%
●	China	6,843	8,110	1,267	19%
●	Philippines	1,093	2,313	1,220	112%
●	USA	1,573	2,007	434	28%
●	Korea	1,825	1,808	-17	-1%
●	Japan	1,614	1,611	-3	0%
●	Brazil	1,285	1,448	163	13%
●	Germany	1,339	1,235	-104	-8%
●	Thailand	1,039	973	-66	-6%
●	Colombia	541	651	110	20%
●	Malaysia	345	513	168	49%
●	Viet Nam	481	507	26	5%
●	Sri Lanka	283	503	220	78%
●	Chile	338	418	80	24%
●	Great Britain	354	393	39	11%
●	Nepal	586	336	-250	-43%
●	Indonesia	286	325	39	14%
●	France	343	318	-25	-7%
●	Saudi Arabia	546	305	-241	-44%
●	Bangladesh	219	302	83	38%
	Grand Total	36,127	40,484	4,357	12%

Overall YTD regional performance

(Listed in order of 2015 volume)

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Indicator	YTD TSVs	2014	2015	Change in numbers	% change	Indicator	YTD FSVs	2014	2015	Change in numbers	% change
●	Auckland	46,734	53,761	7,027	15%	●	Auckland	22,216	25,035	2,819	13%
●	Canterbury	6,548	7,469	921	14%	●	Canterbury	3,268	3,674	406	12%
●	Waikato	5,290	5,585	295	6%	●	Waikato	2,520	2,758	238	9%
●	Wellington	4,648	5,077	429	9%	●	Wellington	2,237	2,575	338	15%
●	Otago	3,658	3,873	215	6%	●	Otago	1,671	1,917	246	15%
●	Manawatu	2,442	2,407	-35	-1%	●	Bay of Plenty	989	1,074	85	9%
●	Bay of Plenty	1,615	1,933	318	20%	●	Manawatu	959	946	-13	-1%
●	Southland	760	960	200	26%	●	Nelson	604	646	42	7%
●	Nelson	812	932	120	15%	●	Southland	390	571	181	46%
●	Hawke's Bay	662	744	82	12%	●	Hawke's Bay	386	422	36	9%
●	Taranaki	676	633	-43	-6%	●	Undefined	249	362	113	45%
●	Undefined	327	503	176	54%	●	Northland	311	260	-51	-16%
●	Northland	409	425	16	4%	●	Taranaki	303	214	-89	-29%
●	Gisborne	32	25	-7	-22%	●	Marlborough	3	12	9	300%
●	Marlborough	5	15	10	200%	●	Gisborne	14	9	-5	-36%
●	Grand Total	74,627	84,354	9,727	13%	●	Grand Total	36,127	40,484	4,357	12%

Overall:

November RSV November FSV November TSV

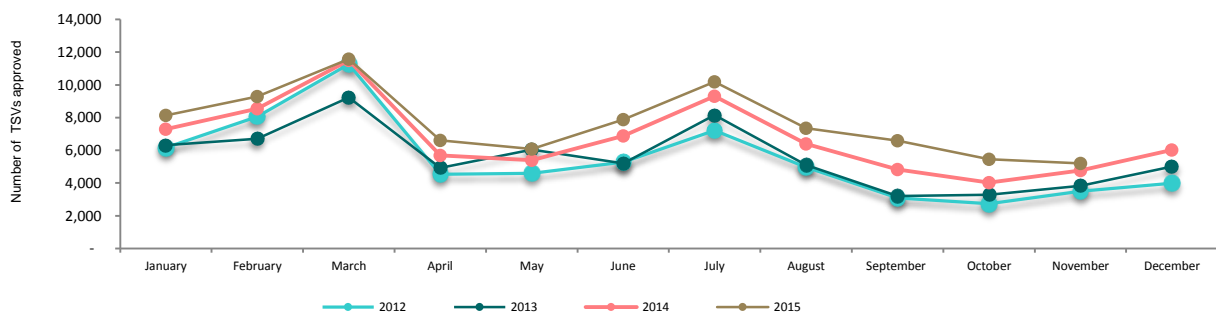
↑ 315 20% → 120 4% ↑ 435 9%

YTD RSV YTD FSV YTD TSV

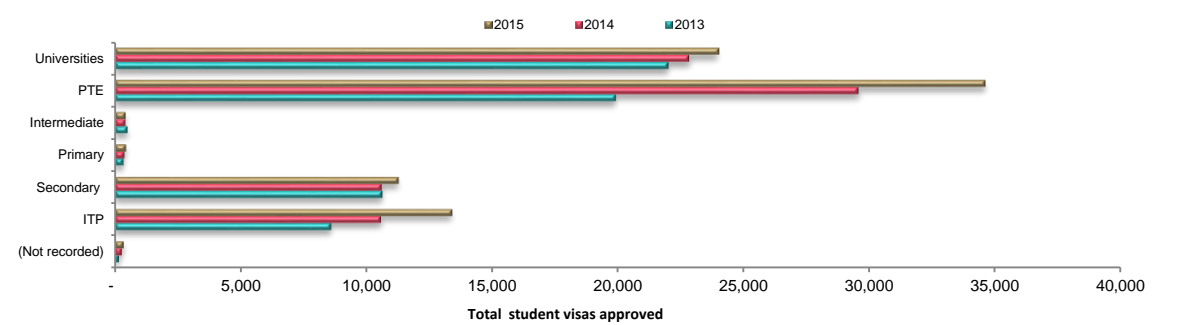
↑ 5,370 14% ↑ 4,357 12% ↑ 9,727 13%

YTD (January to November)

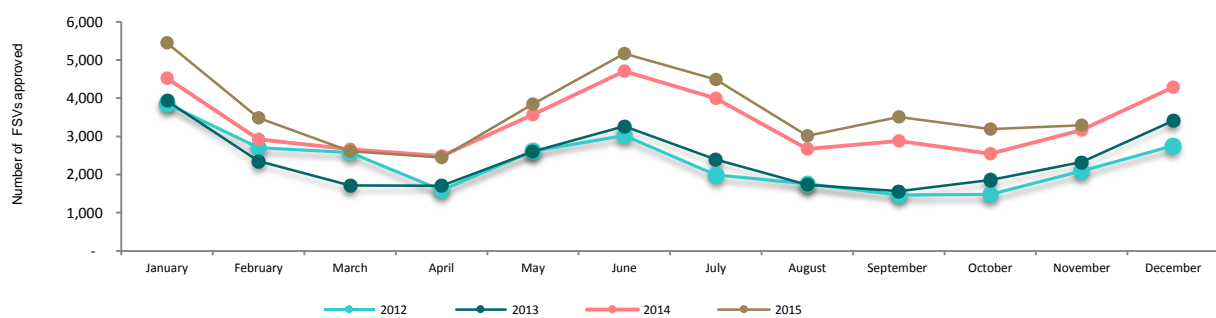
Overall: Total student visas (TSV), 2012 - 2015



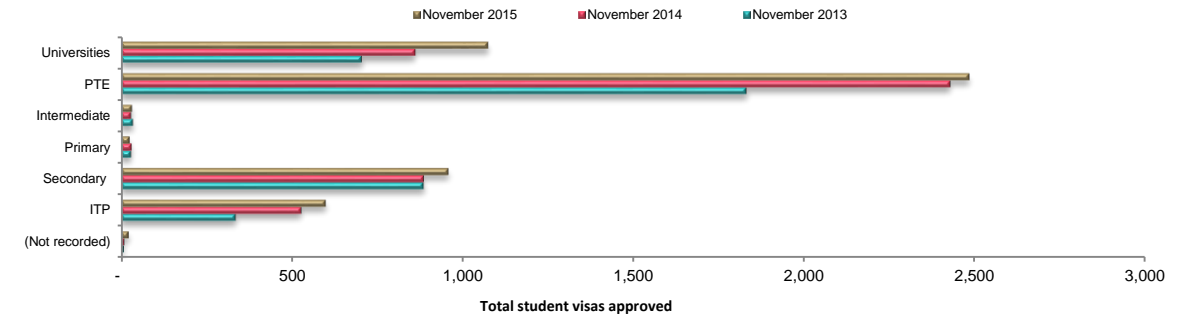
Overall: Total student visas issued by sector, YTD



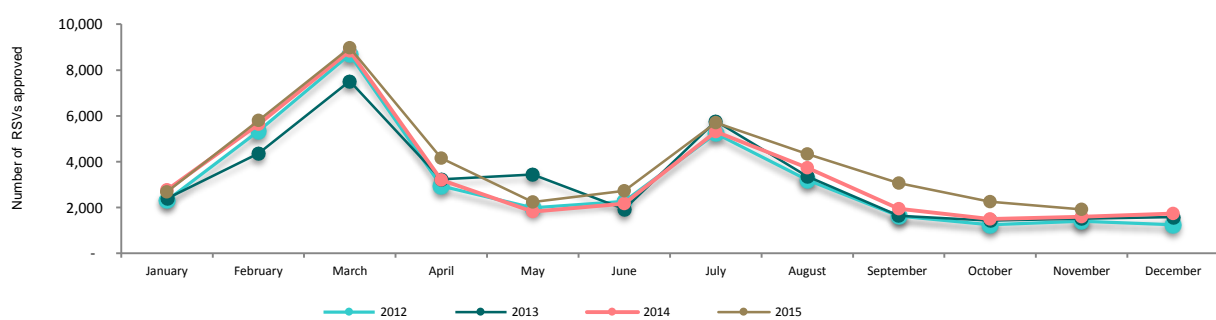
Overall: First time student visas (FSV), 2012 - 2015



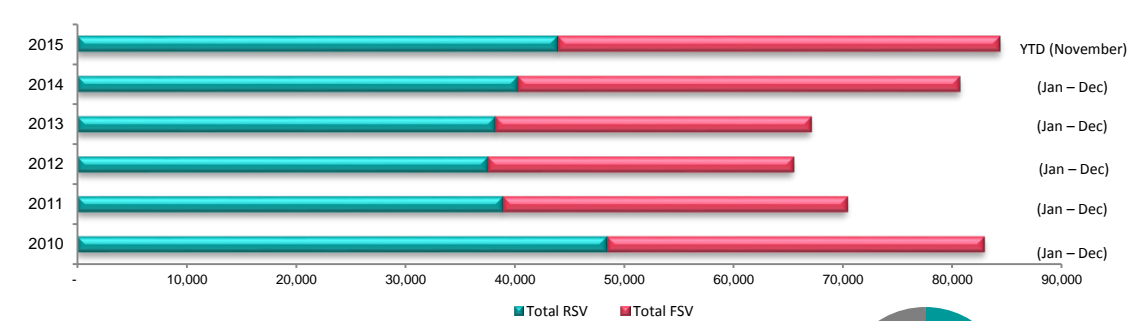
Overall: Total student visas issued by sector, November



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



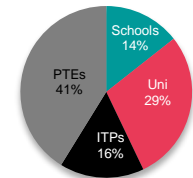
Overall: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- YTD TSV and FSVs increased by 13% and 12% (9,727, 4,357), and RSVs increased by 14% (5,370).
- November experienced mixed results, with FSVs flat with up 4% (120) increase and RSVs up 20% (315).
- The majority of YTD growth has been driven by PTEs and ITPs, together contributing an additional 7,827 TSVs.

YTD 2015 sector breakdown of TSVs

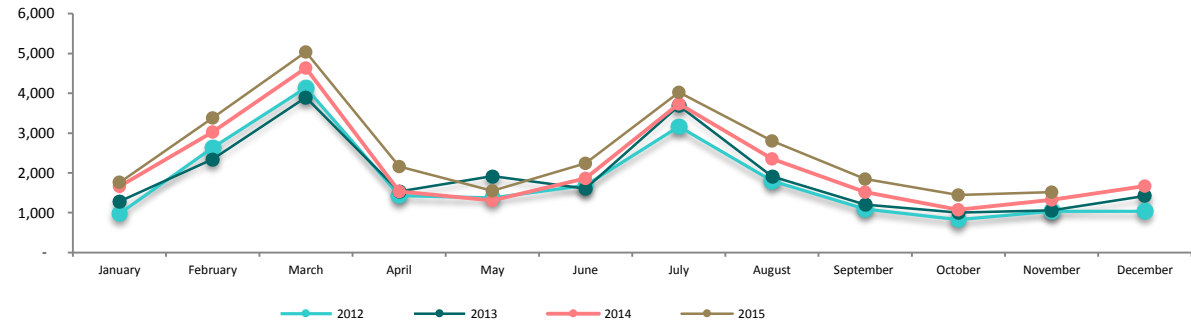


China:

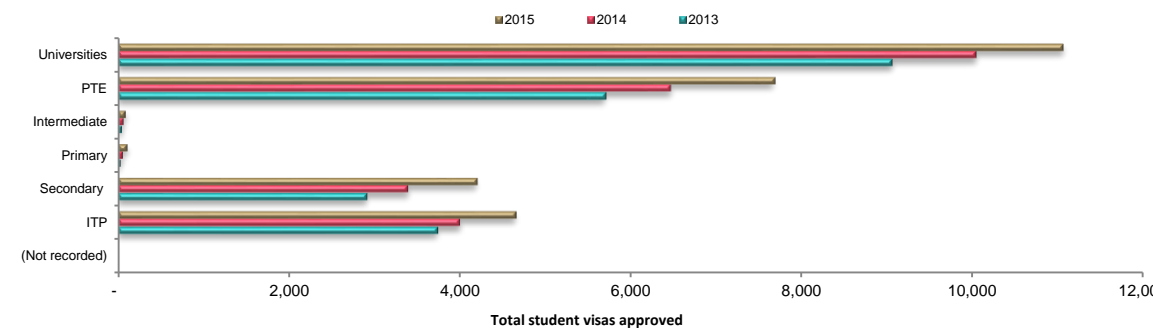
November RSV	November FSV	November TSV
↑ 125 19%	↑ 71 11%	↑ 196 15%

YTD RSV	YTD FSV	YTD TSV
↑ 2,473 14%	↑ 1,267 19%	↑ 3,740 16%

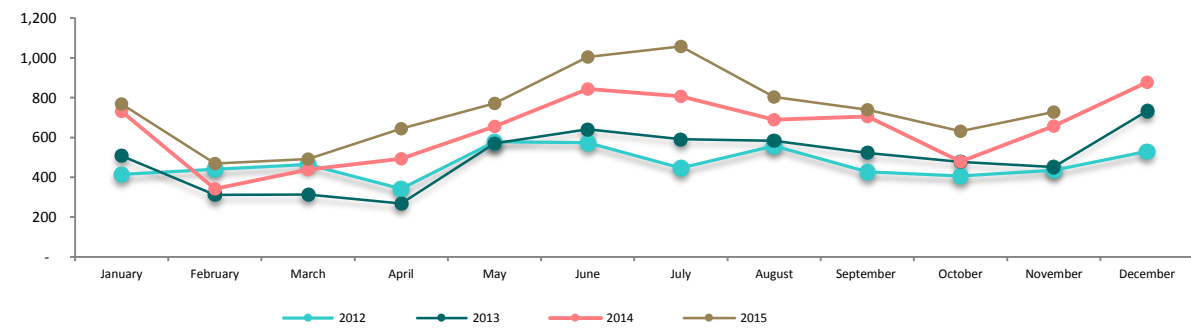
China: Total student visas (TSV), 2012 - 2015



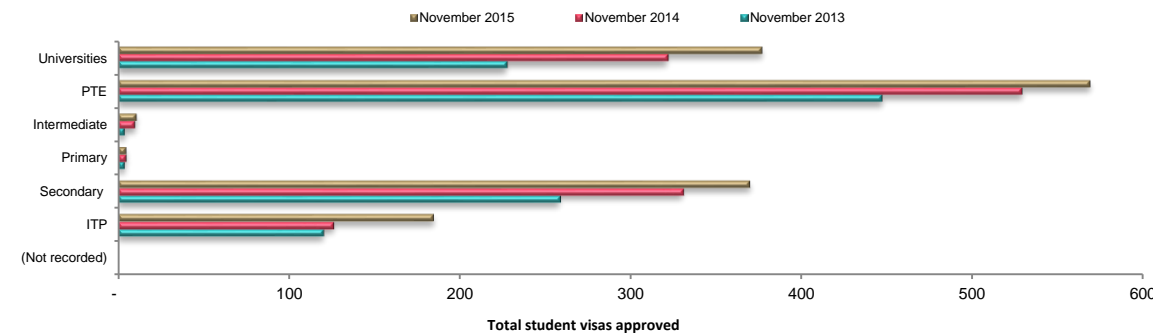
China: Total student visas issued by sector, YTD



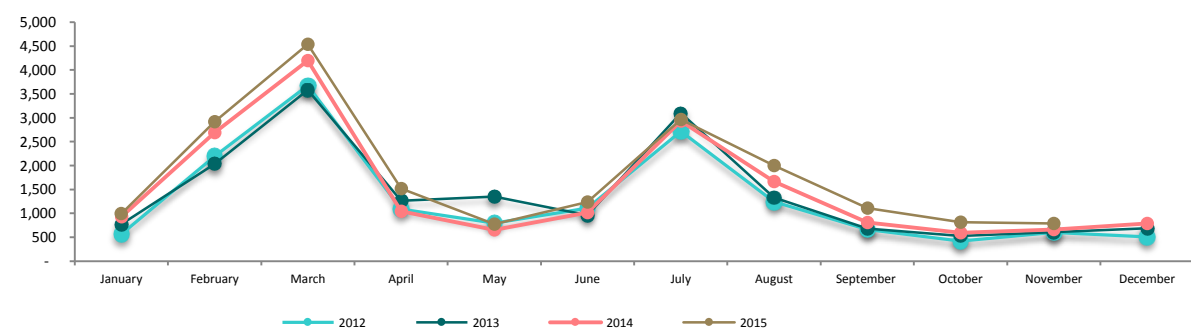
China: First time student visas (FSV), 2012 - 2015



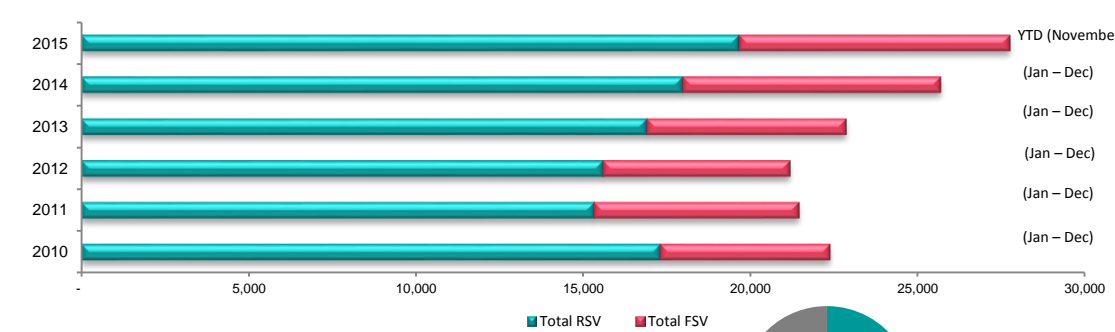
China: Total student visas issued by sector, November



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

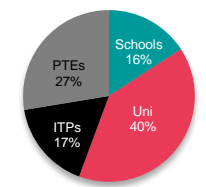


China: Cumulative total for RSV vs. FSV, 2010 - 2015

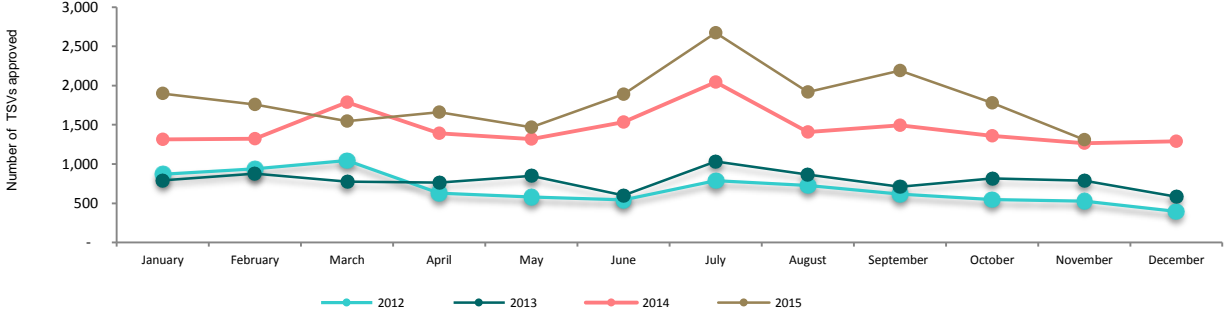


- Takeaways:**
- China continues to show strong growth in all sectors. YTD TSVs have grown by 16% (3,740).
 - November FSVs grew by 11% (71), while RSVs increased by 19% (125).

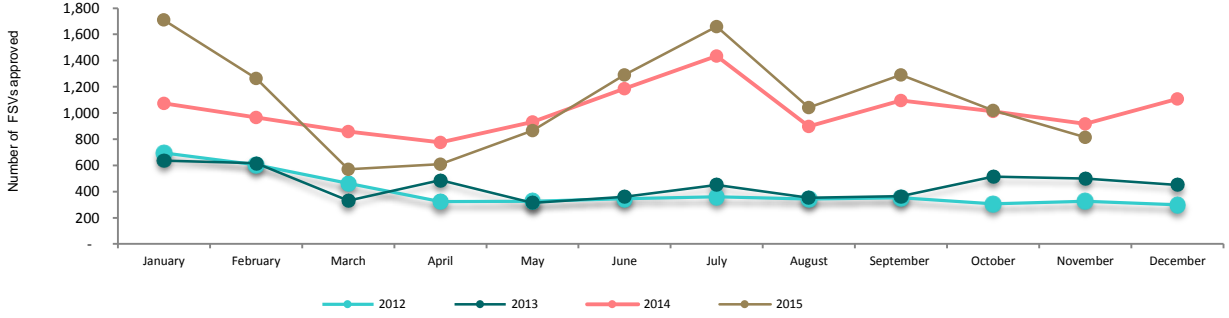
YTD 2015 sector breakdown of TSVs



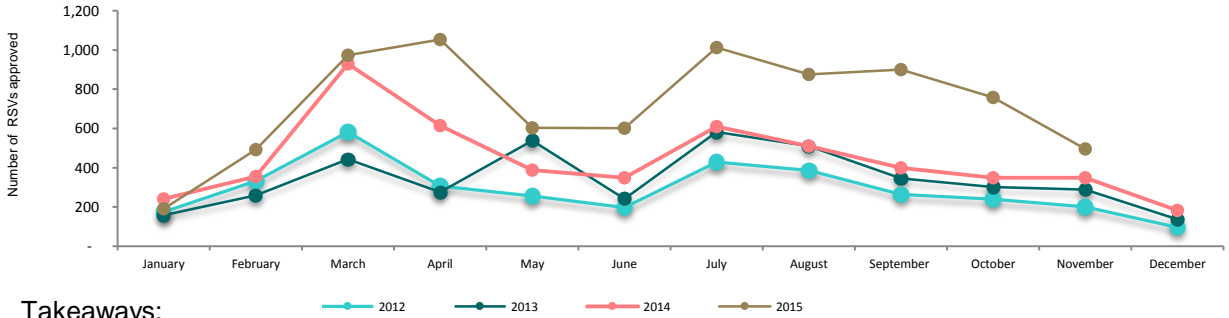
India: Total student visas (TSV), 2012 - 2015



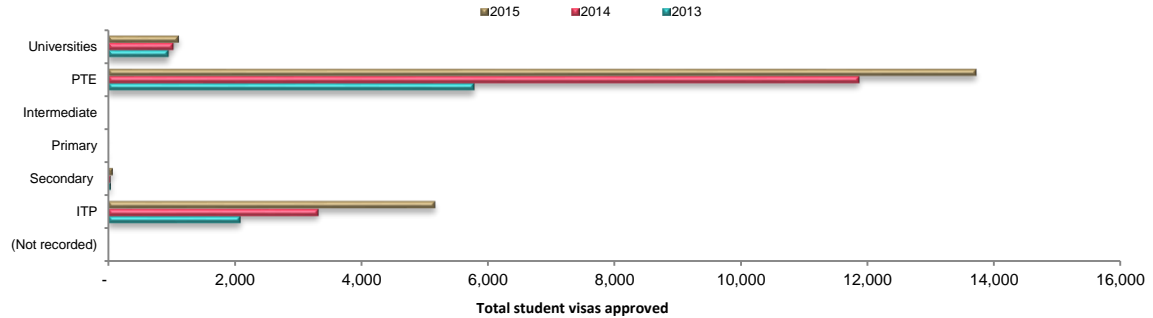
India: First time student visas (FSV), 2012 - 2015



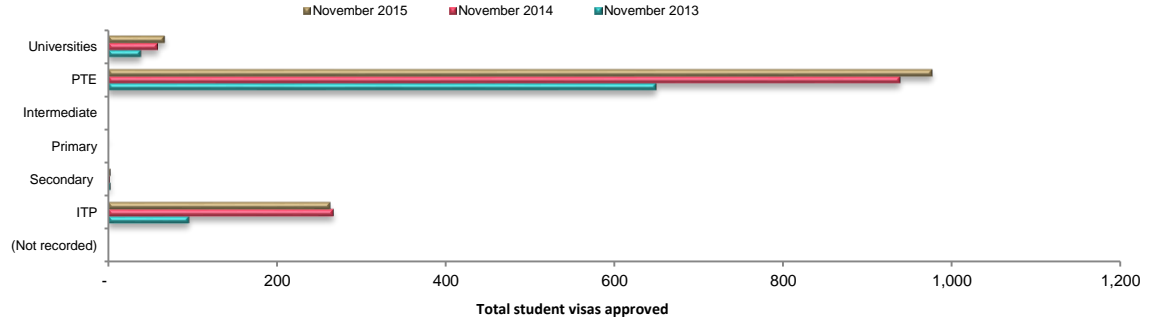
India: Renewed student visas (RSV), 2012 - 2015



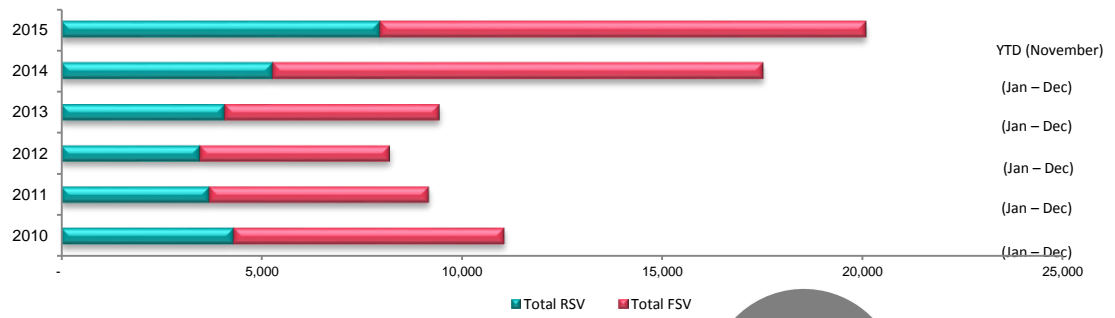
India: Total student visas issued by sector, YTD



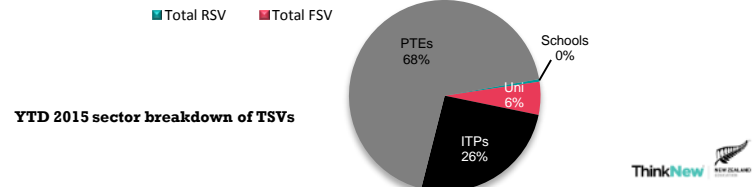
India: Total student visas issued by sector, November



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



- Takeaways:**
- November was a good month for RSVs, up 42% (147) while FSVs were down 11% (-103).
 - 74% of the YTD growth has been driven by RSV growth.
 - YTD FSVs in the ITP sector have increased 61% (1,462).

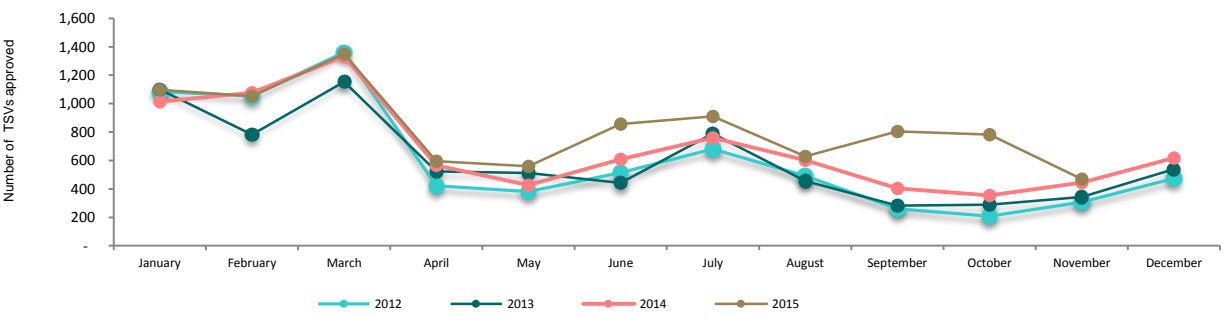




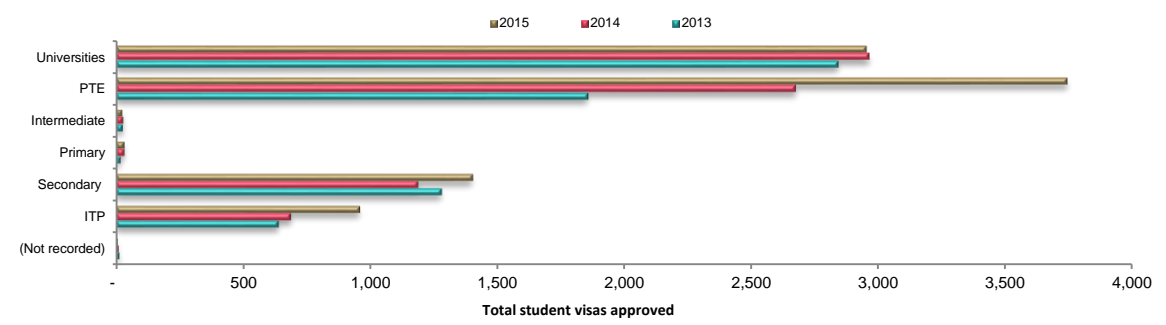
November RSV	November FSV	November TSV
➔ 3 3%	⬆️ 22 7%	⬆️ 25 6%

YTD RSV	YTD FSV	YTD TSV
➔ 26 1%	⬆️ 1,492 42%	⬆️ 1,518 20%

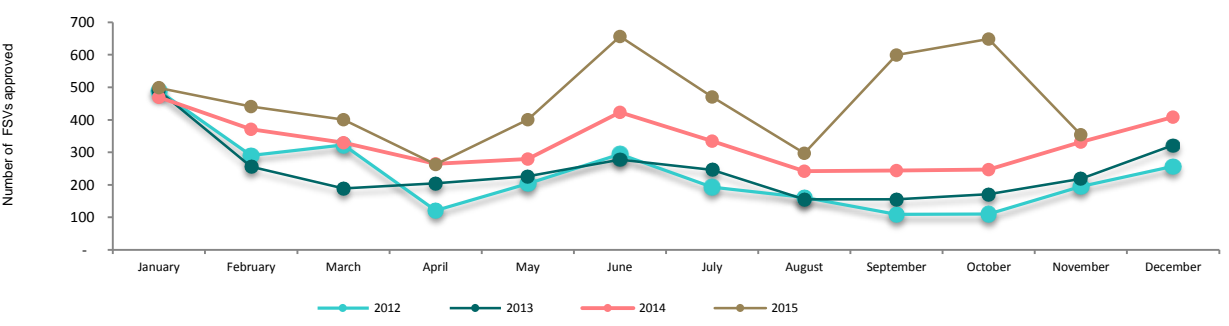
ASEAN: Total student visas (TSV), 2012 - 2015



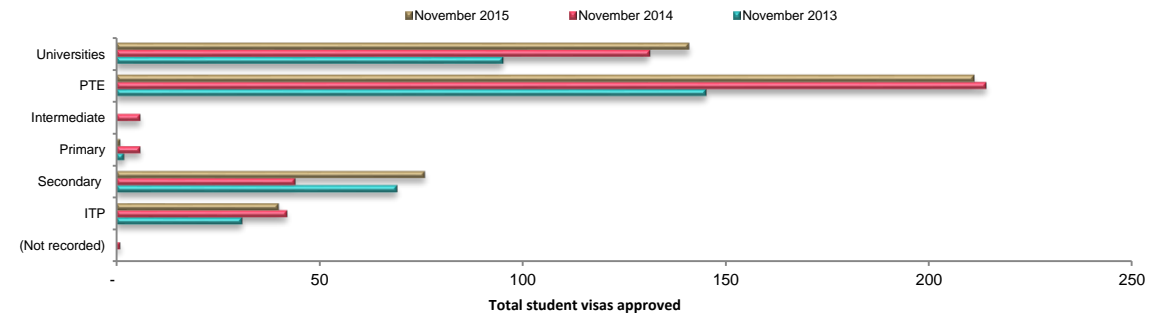
ASEAN: Total student visas issued by sector, YTD



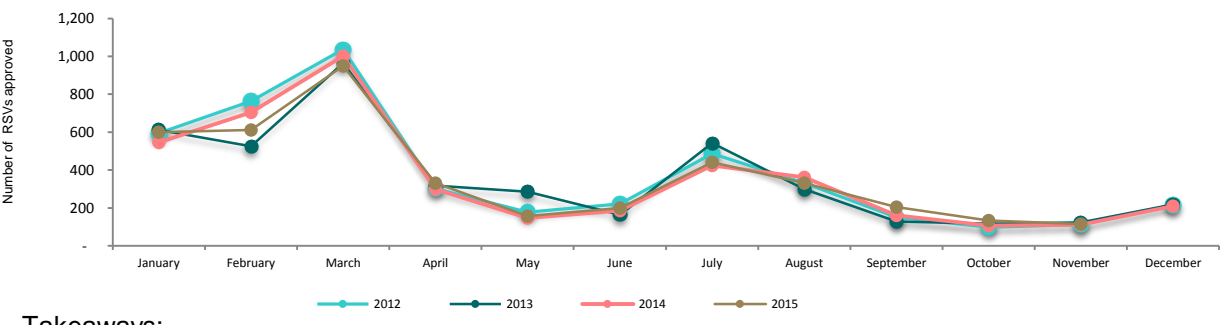
ASEAN: First time student visas (FSV), 2012 - 2015



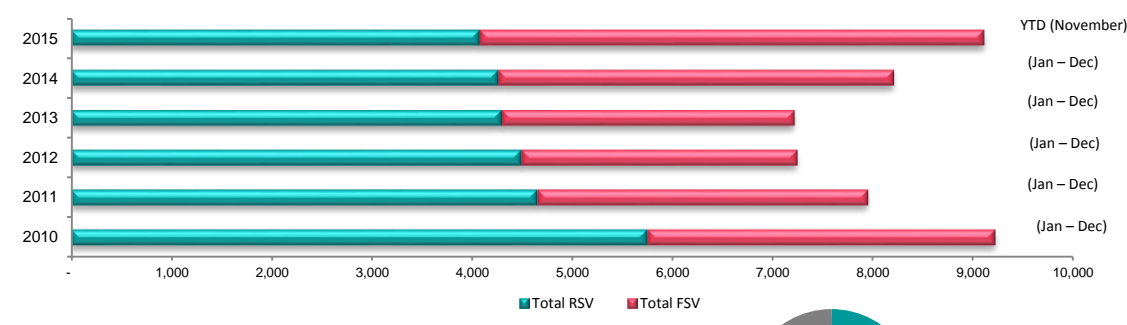
ASEAN: Total student visas issued by sector, November



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



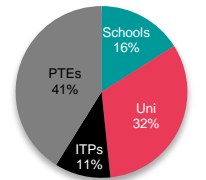
ASEAN: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- ASEAN has demonstrated strong growth in FSVs, up 42% (1,492) YTD.
- November FSVs increased by 7% (22) and RSVs flat up 3% (3).
- YTD PTEs have shown a 40% (1,067) growth and ITPs up 39% (269) in TSVs.

YTD 2015 sector breakdown of TSVs

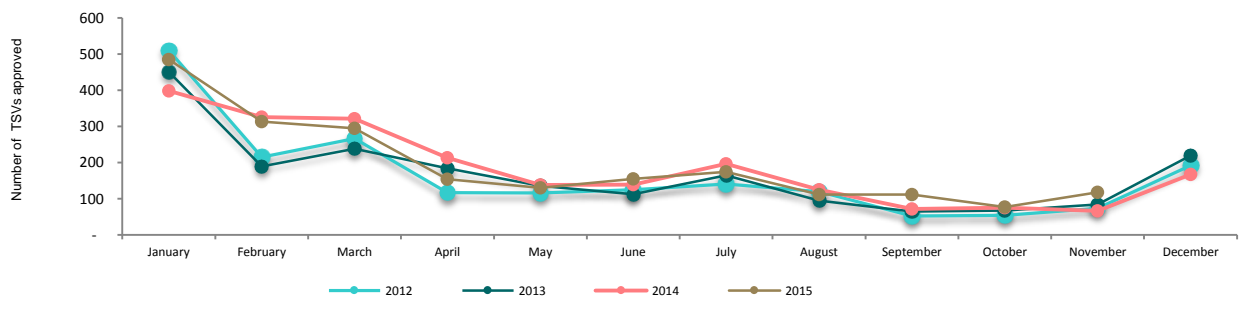


Thailand:

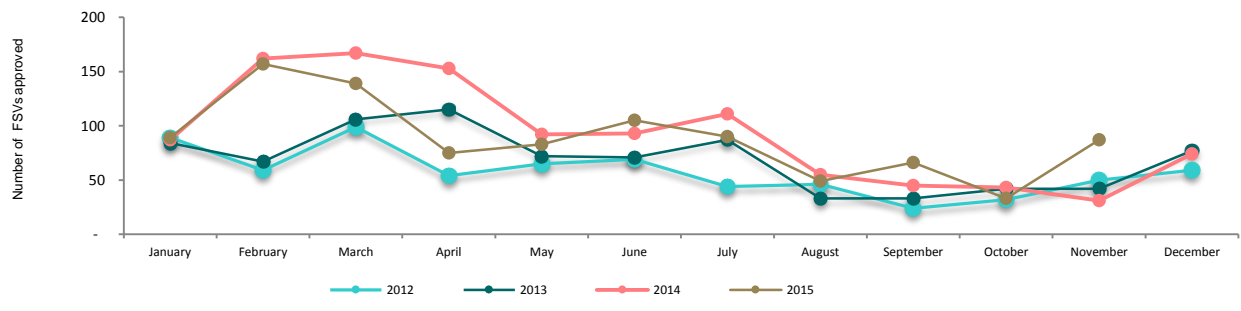
November RSV	November FSV	November TSV
↓ -5 -14%	↑ 56 181%	↑ 51 76%

YTD RSV	YTD FSV	YTD TSV
↑ 118 11%	↓ -66 -6%	→ 52 3%

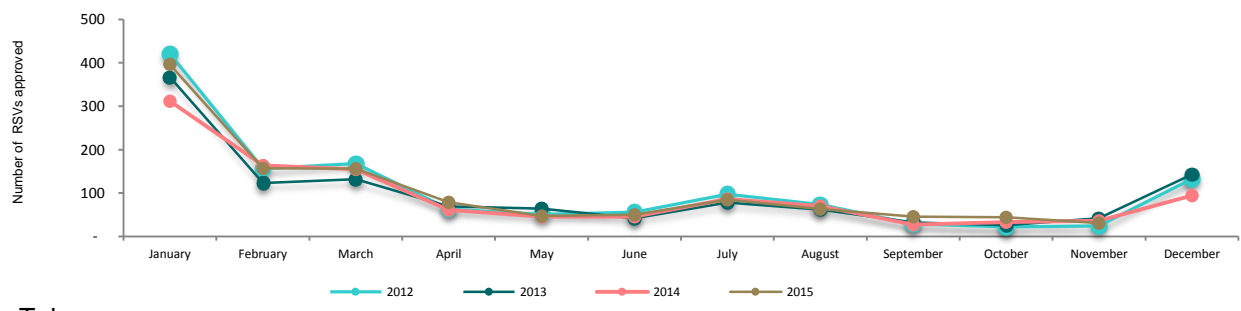
Thailand: Total student visas (TSV), 2012 - 2015



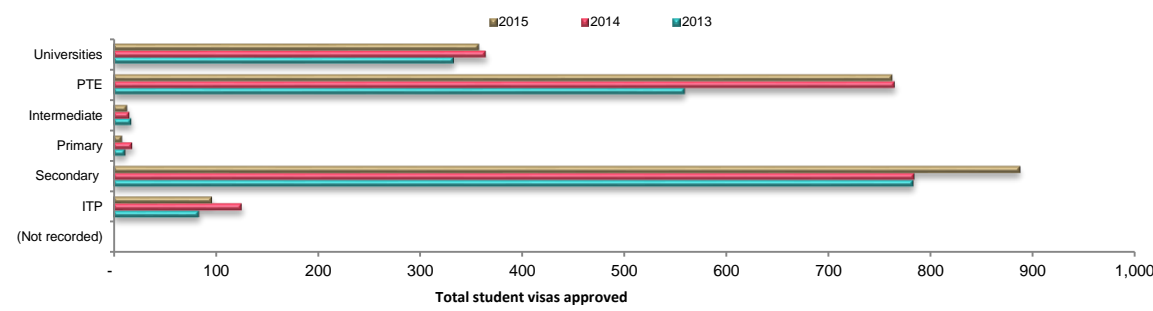
Thailand: First time student visas (FSV), 2012 - 2015



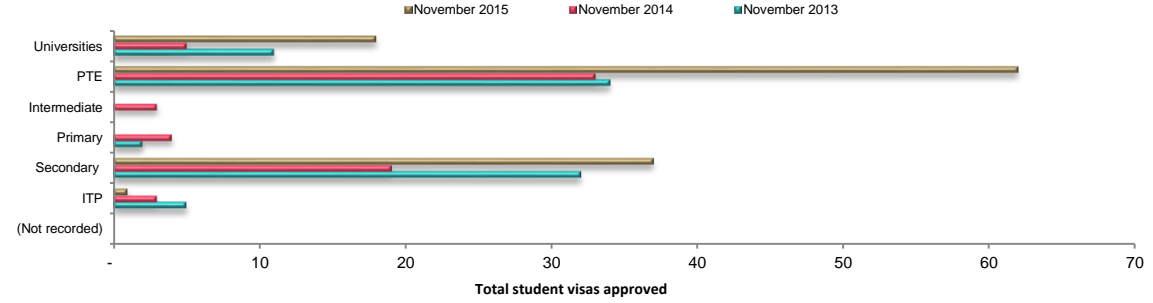
Thailand: Renewed student visas (RSV), 2012 - 2015



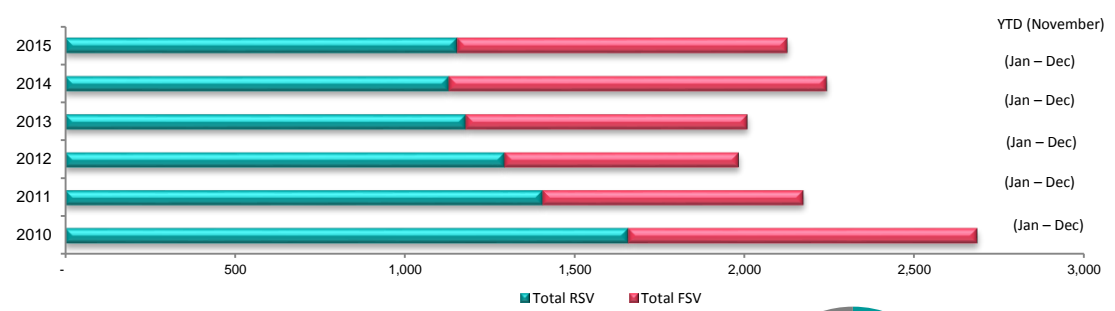
Thailand: Total student visas issued by sector, YTD



Thailand: Total student visas issued by sector, November



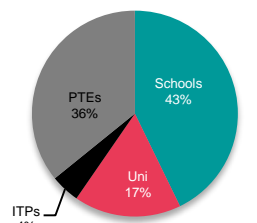
Thailand: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

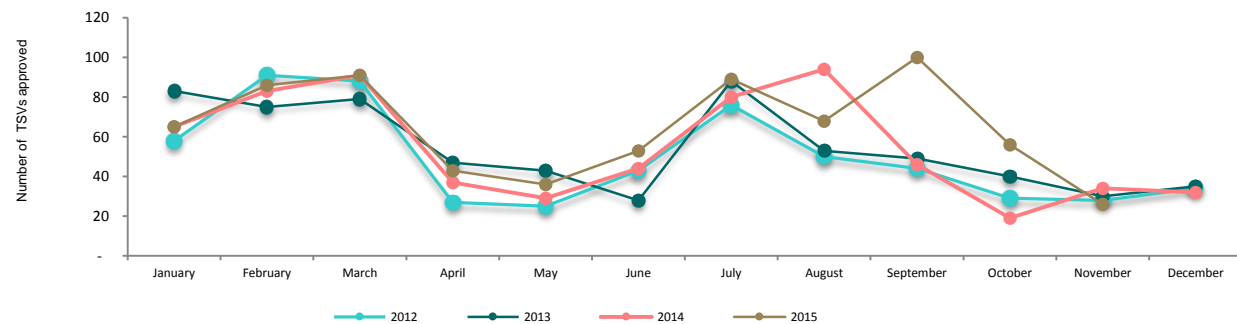
- Thailand is currently tracking flat on YTD TSVs up 3% (52), with an increase in RSVs up 11% (118) nearly equally offset by a decrease in FSVs down 6% (-66).
- November has delivered mixed results, with FSVs up 181% (56) and RSVs down 5% (-14).
- YTD 43% of TSVs have been in the school sectors.

YTD 2015 sector breakdown of TSVs

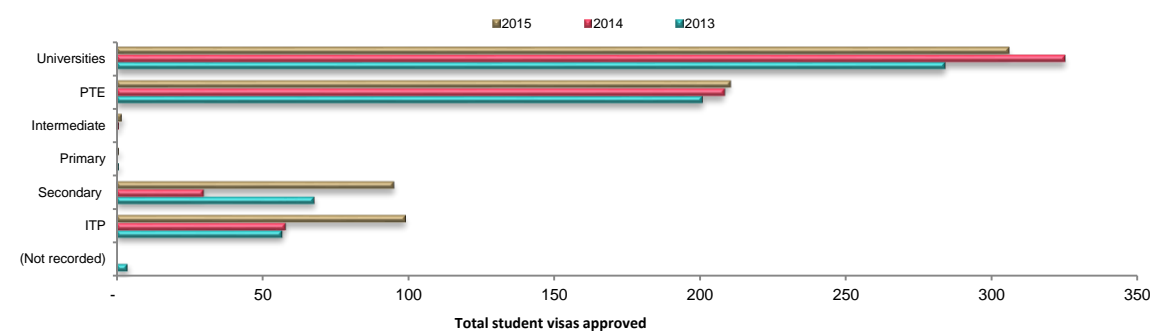




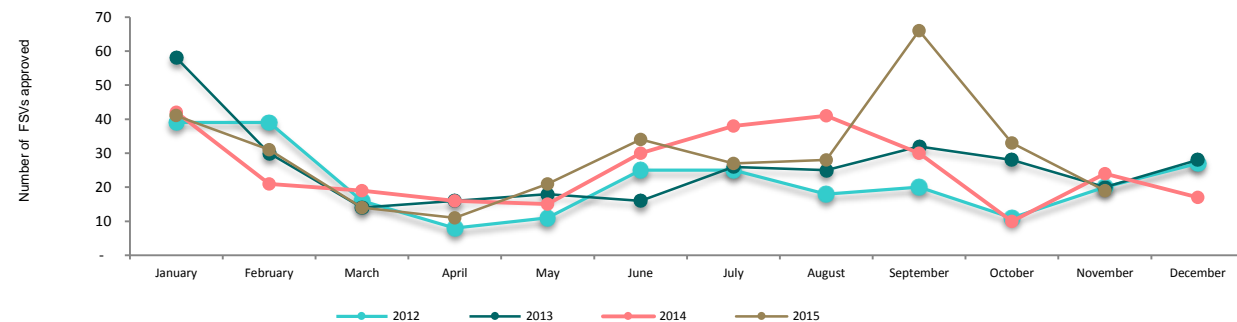
Indonesia: Total student visas (TSV), 2012 - 2015



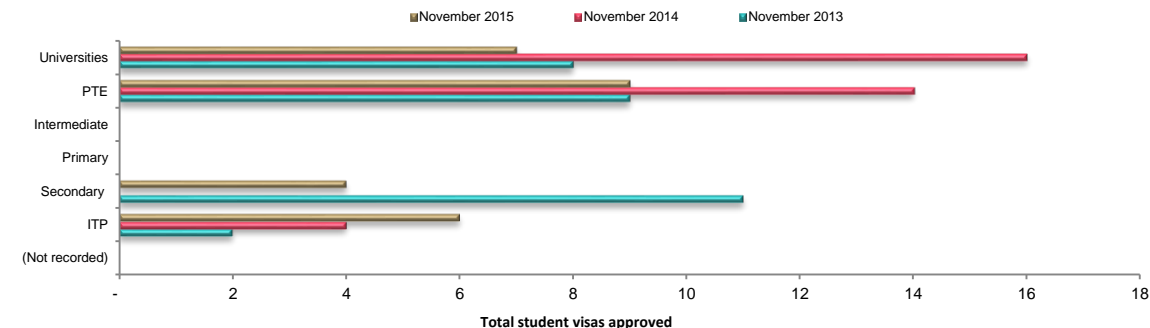
Indonesia: Total student visas issued by sector, YTD



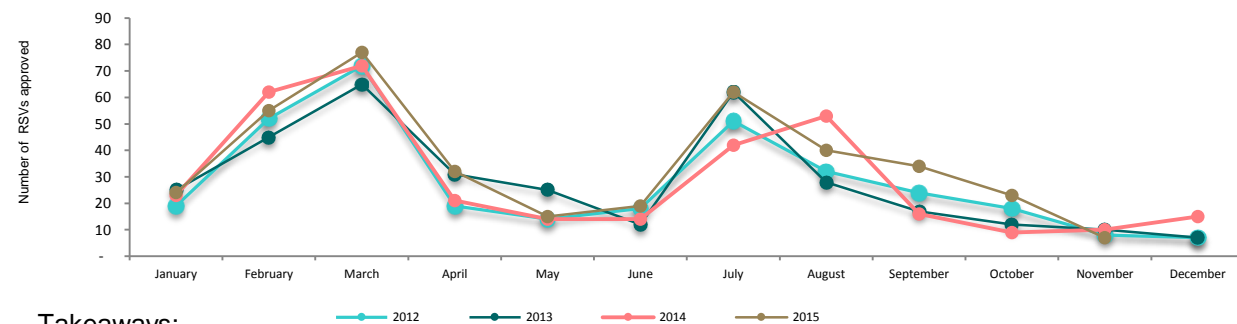
Indonesia: First time student visas (FSV), 2012 - 2015



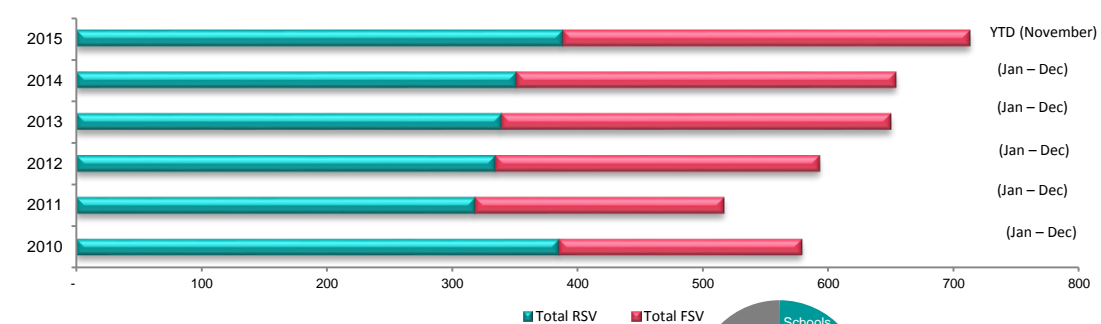
Indonesia: Total student visas issued by sector, November



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



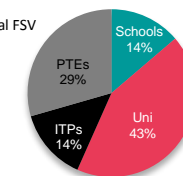
Indonesia: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- YTD there has been strong growth in TSVs up 15% (91) and FSVs up 14% (39).
- November results were down TSVs 24% (-8) and FSVs down 21% (-5).
- YTD secondary schools TSVs have experienced strong growth 217% (65).

YTD 2015 sector breakdown of TSVs

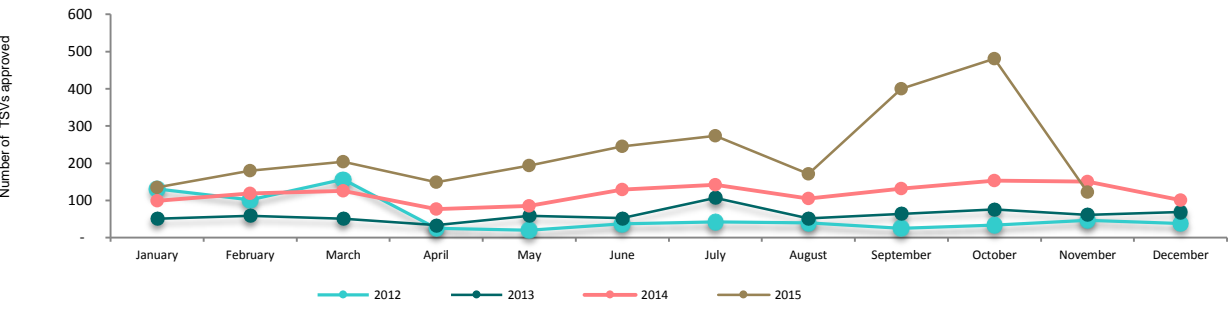


Philippines:

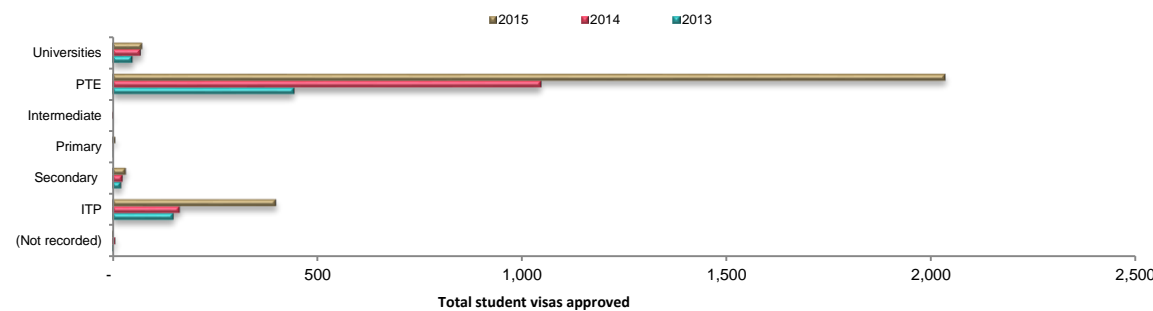
November RSV  **8** **80%** **November FSV**  **-37** **-26%** **November TSV**  **-29** **-19%**

YTD RSV  **17** **8%** **YTD FSV**  **1,220** **112%** **YTD TSV**  **1,237** **94%**

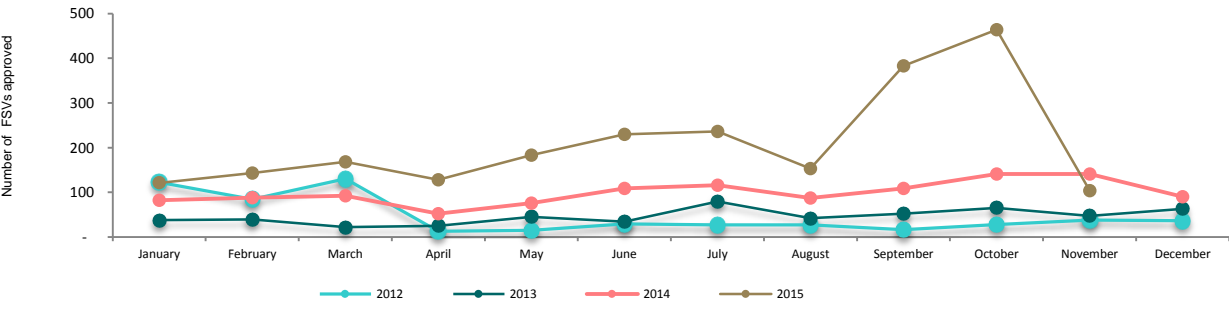
Philippines: Total student visas (TSV), 2012 - 2015



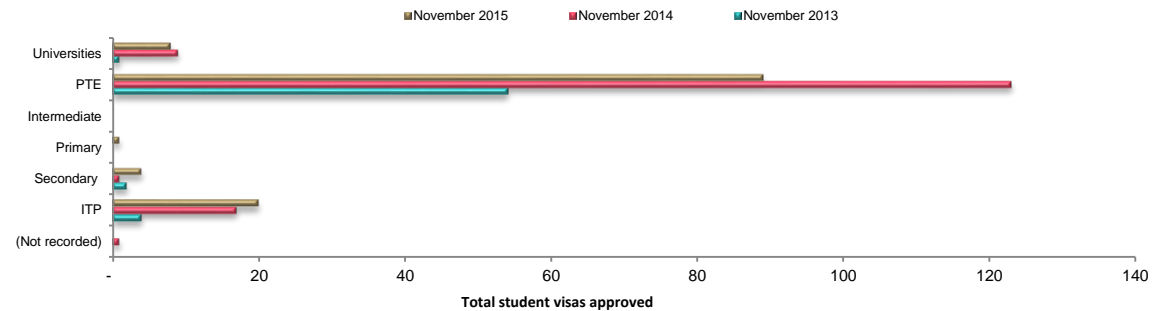
Philippines: Total student visas issued by sector, YTD



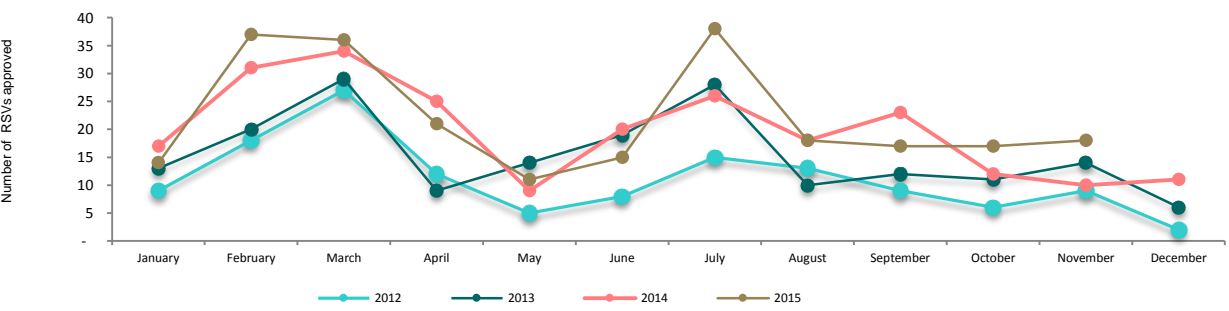
Philippines: First time student visas (FSV), 2012 - 2015



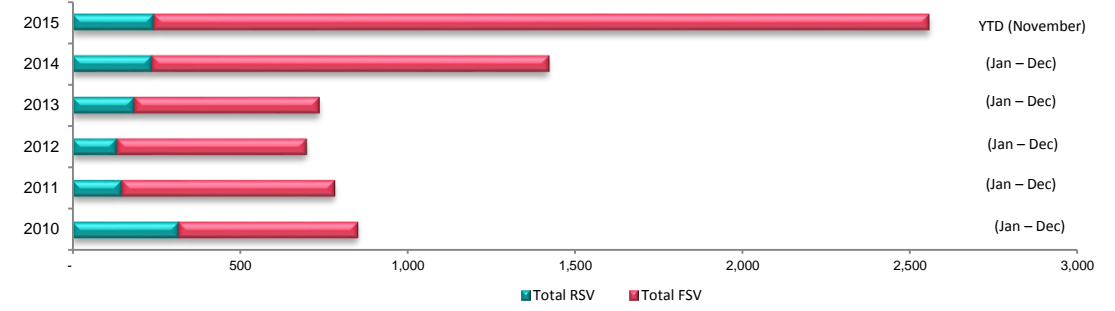
Philippines: Total student visas issued by sector, November



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



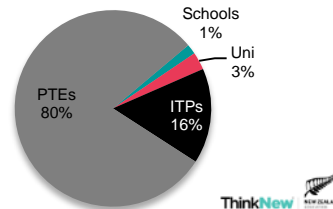
Philippines: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- The Philippines continues to be one of NZ's fastest growing markets, both in absolute and percentage terms. YTD, TSVs have increased by 94% (1,237), and FSVs have increased by 112% (1,220).
- November results were mixed with FSV down 26% (-37) and RSVs up 80% (8).

YTD 2015 sector breakdown of TSVs



November RSV
 November FSV
 November TSV

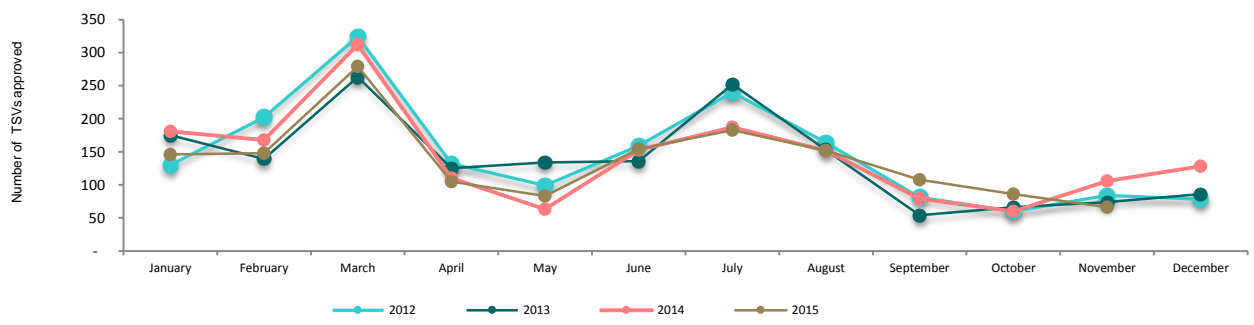
↓ -2 -7%
 ↓ -38 -49%
 ↓ -40 -38%

YTD RSV
 YTD FSV
 YTD TSV

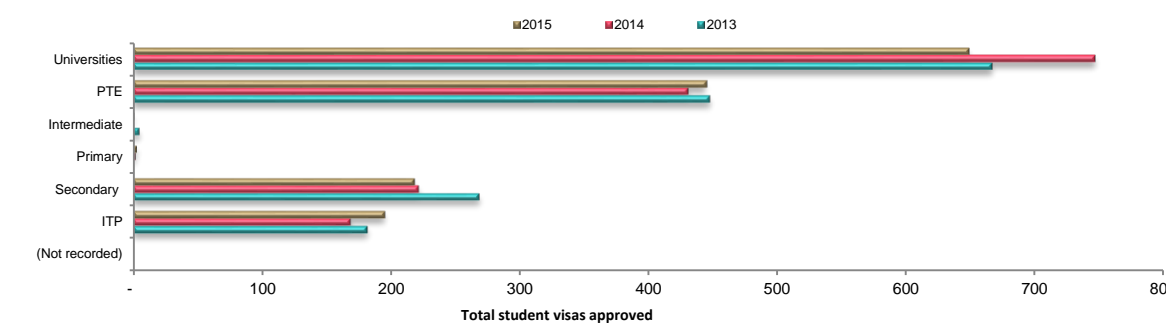
↓ -87 -8%
 ↑ 26 5%
 → -61 -4%

YTD (January to November)

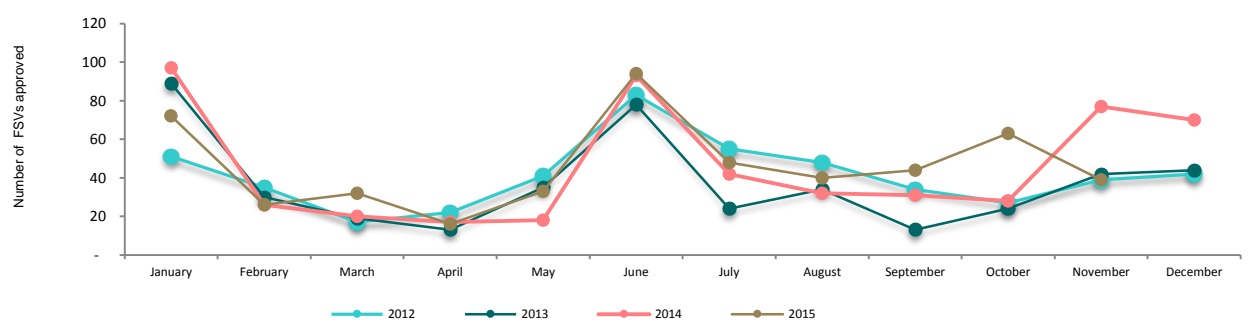
Viet Nam: Total student visas (TSV), 2012 - 2015



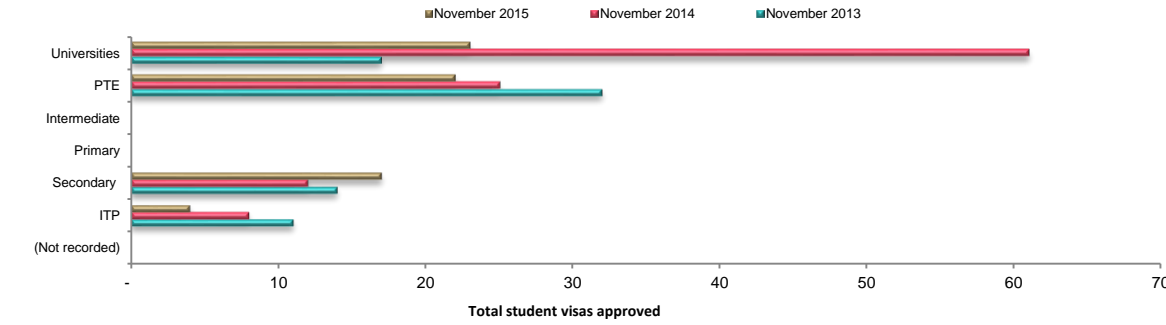
Viet Nam: Total student visas issued by sector, YTD



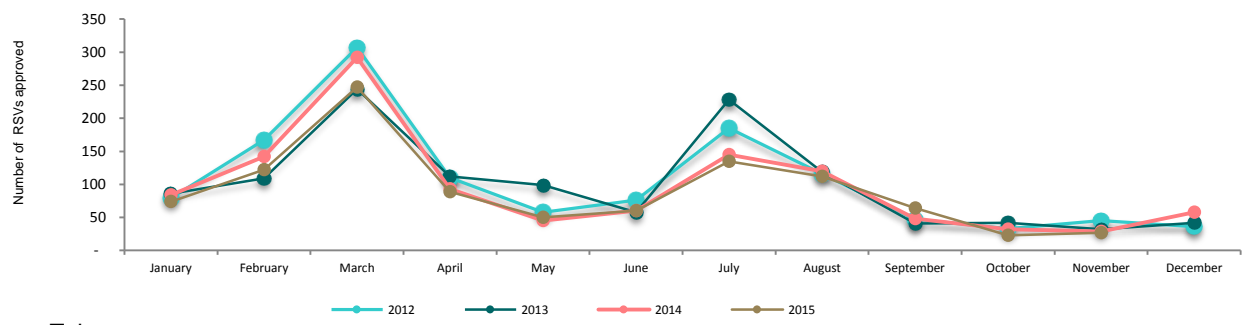
Viet Nam: First time student visas (FSV), 2012 - 2015



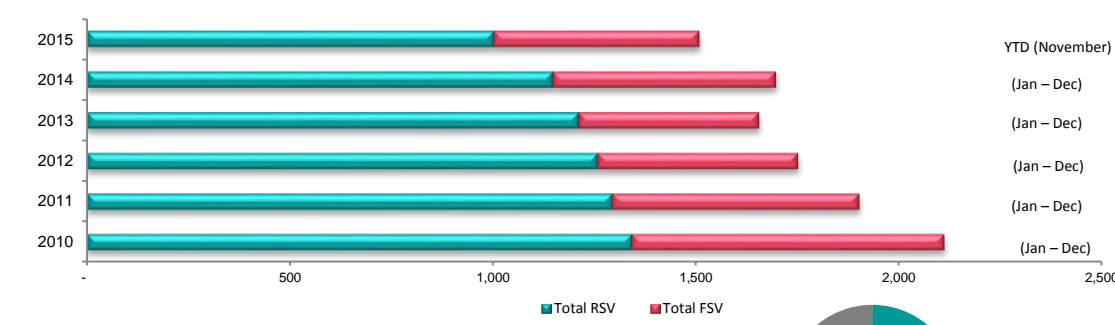
Viet Nam: Total student visas issued by sector, November



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

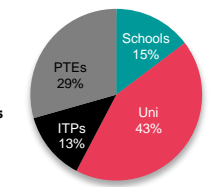


Viet Nam: Cumulative total for RSV vs. FSV, 2010 - 2015



- Takeaways:**
- YTD, TSVs are tracking relatively flat, with a decline in RSVs mostly offset by an increase in FSVs.
 - November results FSVs are down 49% (-38) and TSVs down 38% (-38).

YTD 2015 sector breakdown of TSVs



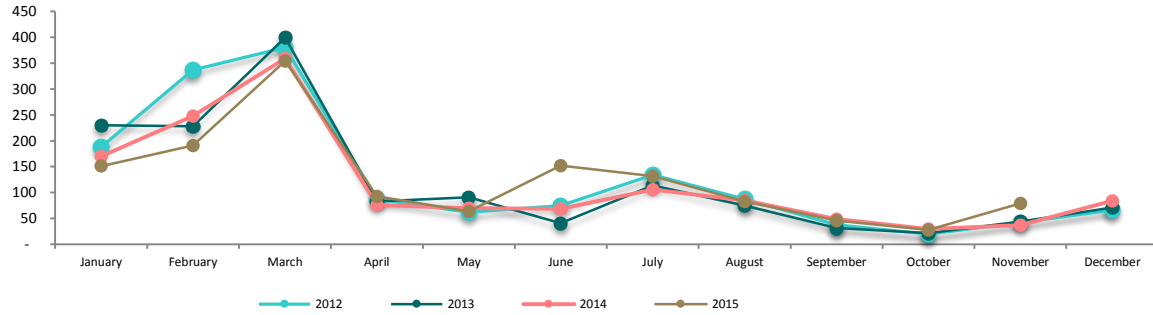
Malaysia:



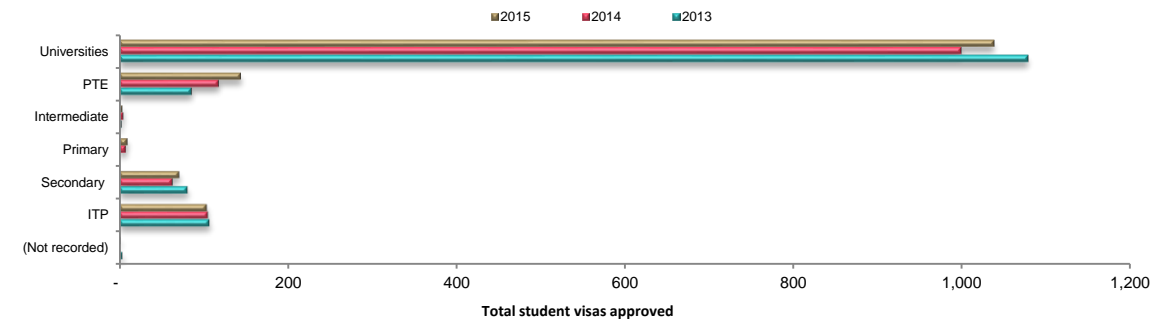
November RSV	November FSV	November TSV
↑ 3 20%	↑ 39 177%	↑ 42 114%

YTD RSV	YTD FSV	YTD TSV
↓ -94 -10%	↑ 168 49%	↑ 74 6%

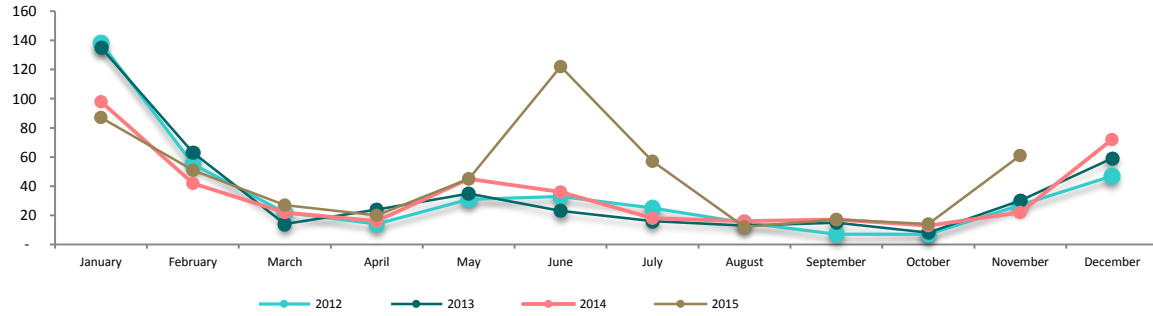
Malaysia: Total student visas (TSV), 2012 - 2015



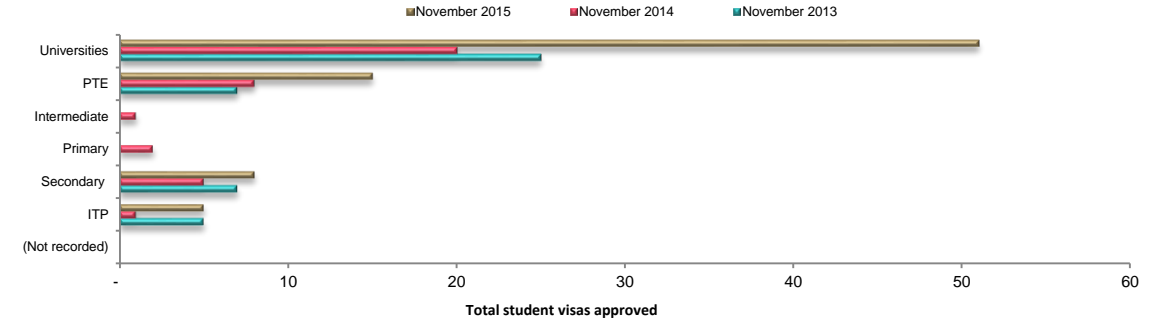
Malaysia: Total student visas issued by sector, YTD



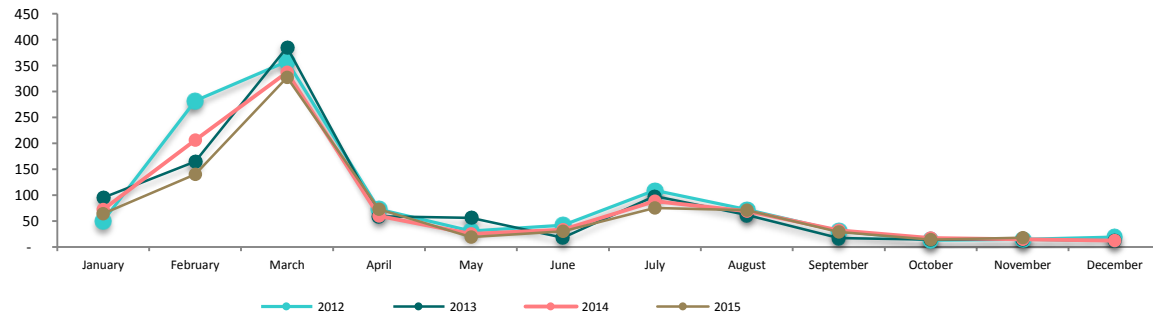
Malaysia: First time student visas (FSV), 2012 - 2015



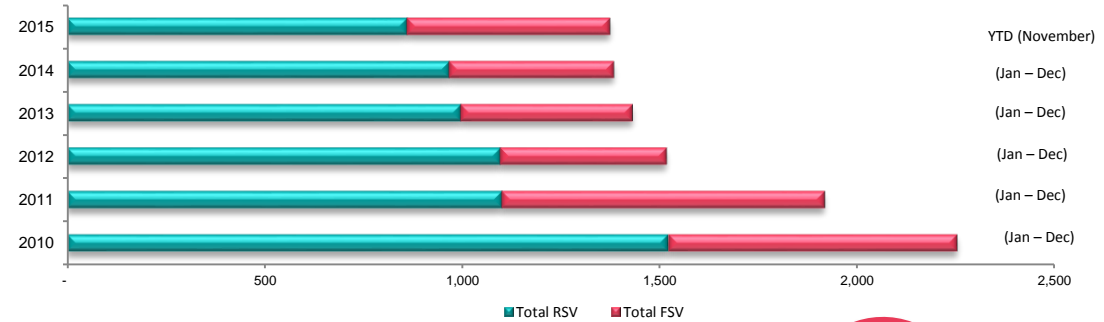
Malaysia: Total student visas issued by sector, November



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



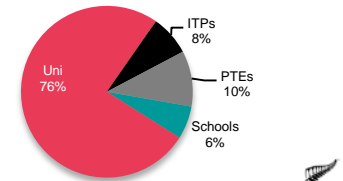
Malaysia: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- Malaysian YTD TSVs are up 6% (74). With FSVs, up 49% (168), which has offset the decline in RSVs, down 10% (-94).
- YTD the university sector has experienced strong growth in FSV up 66% (141).

YTD 2015 sector breakdown of TSVs

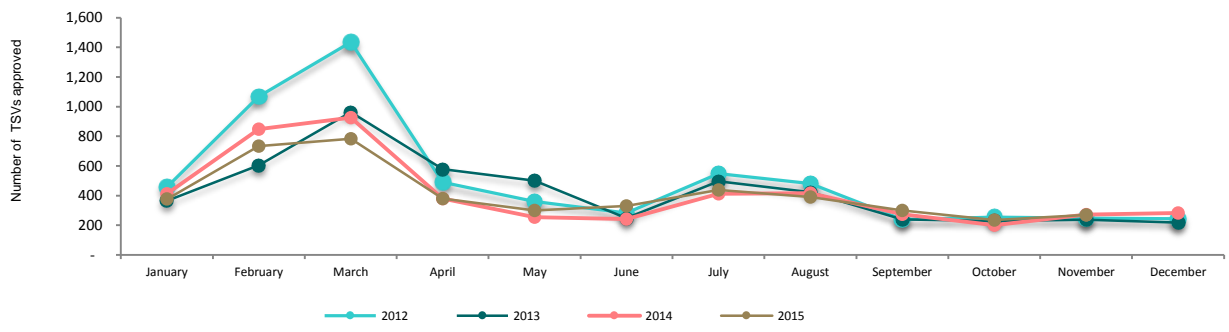


Korea:

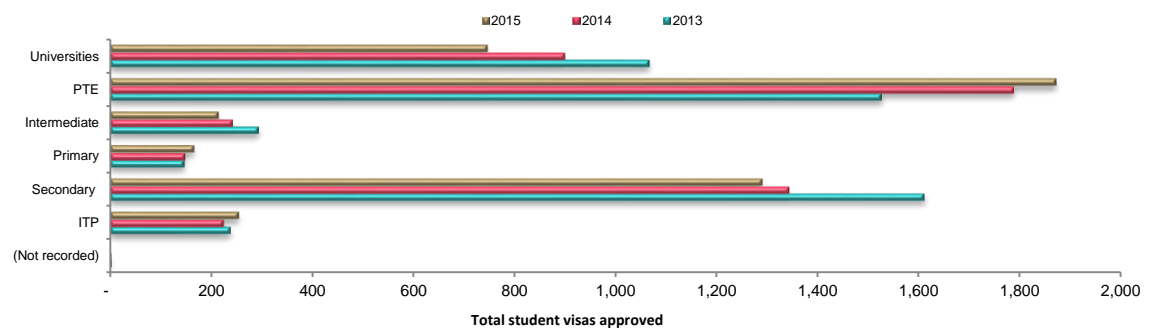
November RSV	November FSV	November TSV
↑ 21 24%	↓ -25 -13%	→ -4 -1%

YTD RSV	YTD FSV	YTD TSV
→ -86 -3%	→ -17 -1%	→ -103 -2%

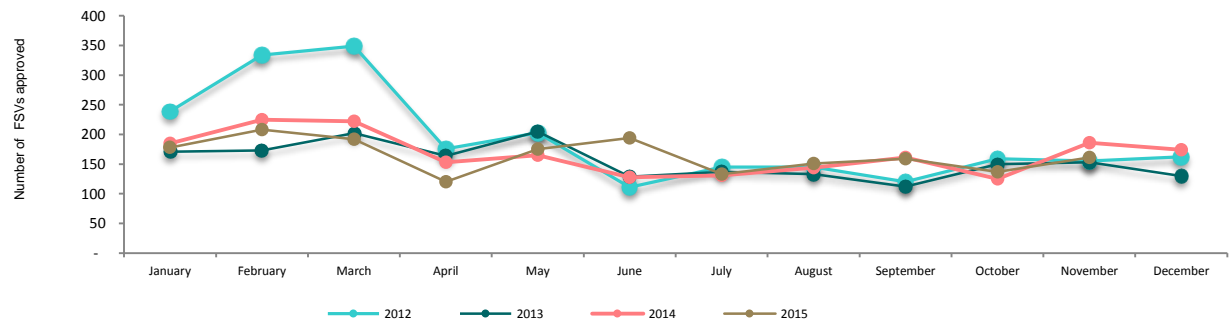
Korea: Total student visas (TSV), 2012 - 2015



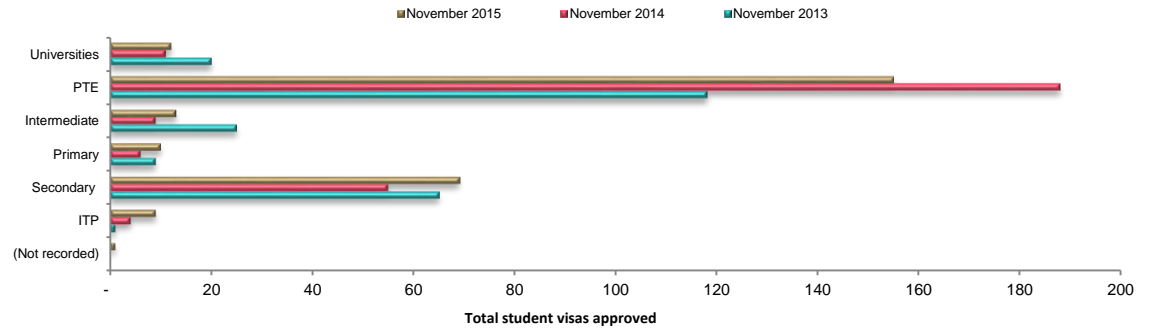
Korea: Total student visas issued by sector, YTD



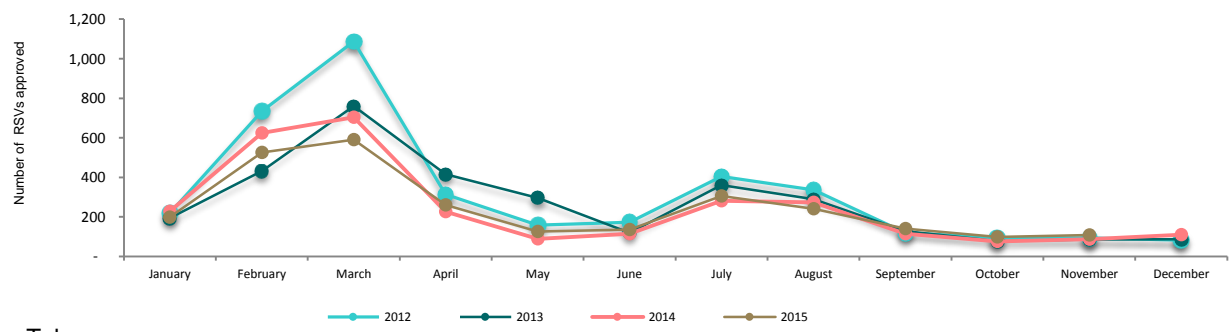
Korea: First time student visas (FSV), 2012 - 2015



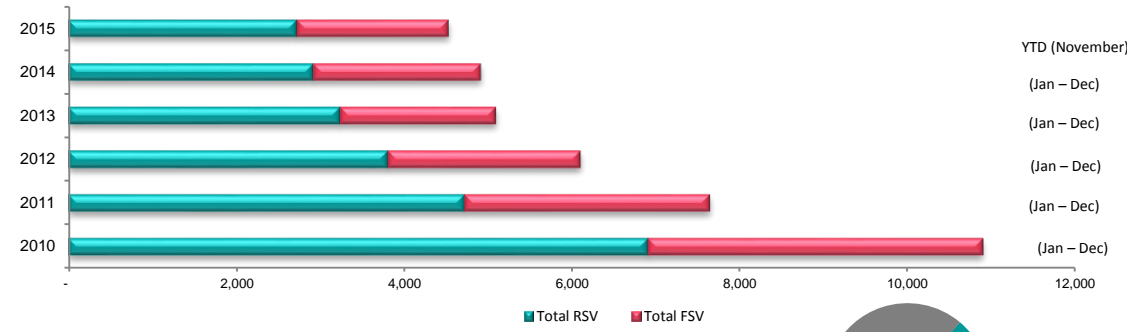
Korea: Total student visas issued by sector, November



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

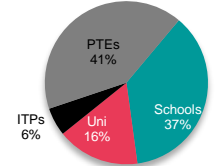


Korea: Cumulative total for RSV vs. FSV, 2010 - 2015



- Takeaways:**
- YTD results have been flat with TSVs down 2% (-103) and FSVs down 1% (-17).
 - November results are mixed with FSVs down 13% (-25) and RSVs up 24% (21).

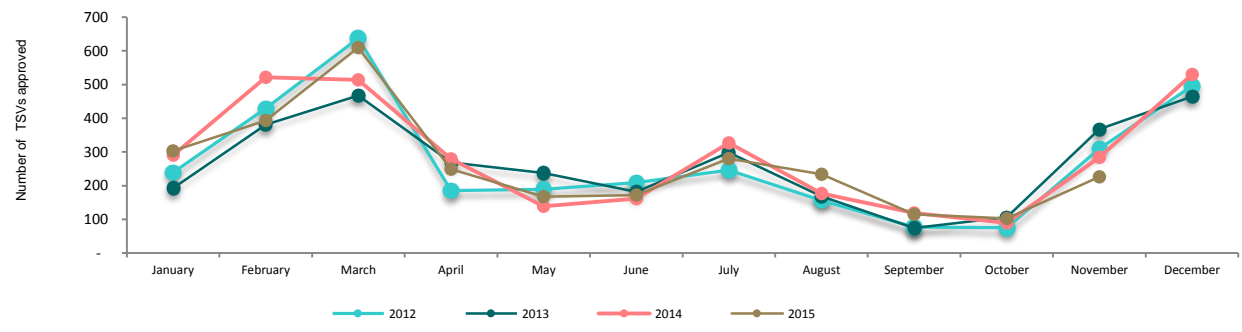
YTD 2015 sector breakdown of TSVs



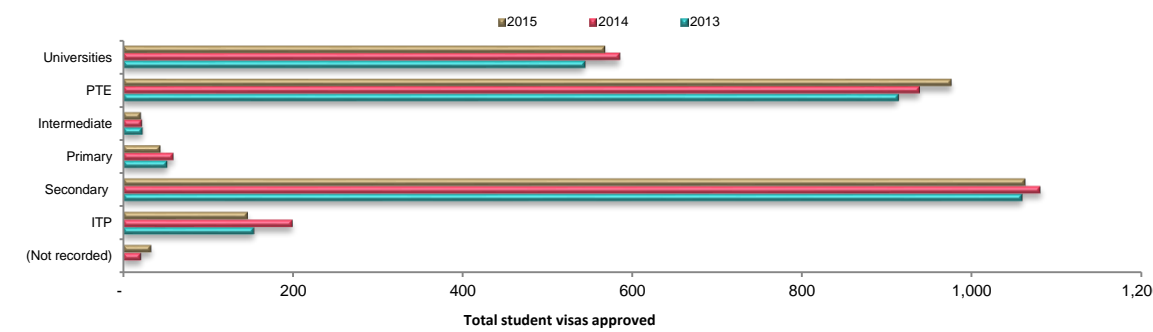
November RSV	November FSV	November TSV
➡ -1 -2%	⬇ -57 -24%	⬇ -58 -20%

YTD RSV	YTD FSV	YTD TSV
➡ -48 -4%	➡ -3 0%	➡ -51 -2%

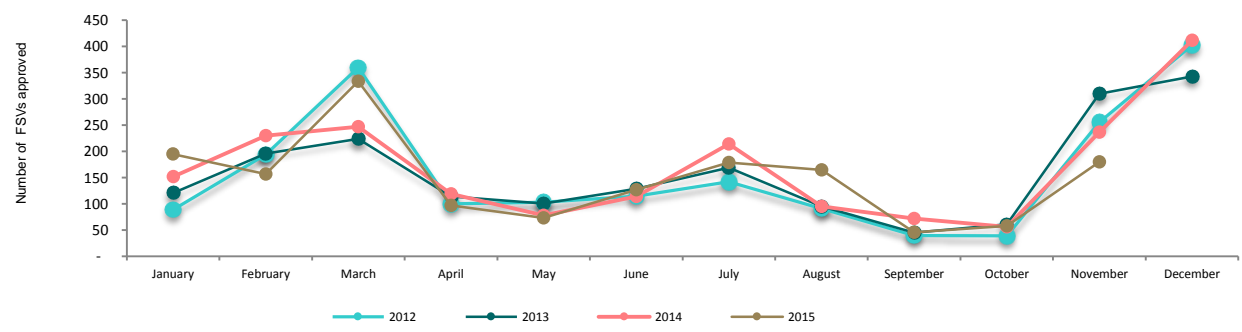
Japan: Total student visas (TSV), 2012 - 2015



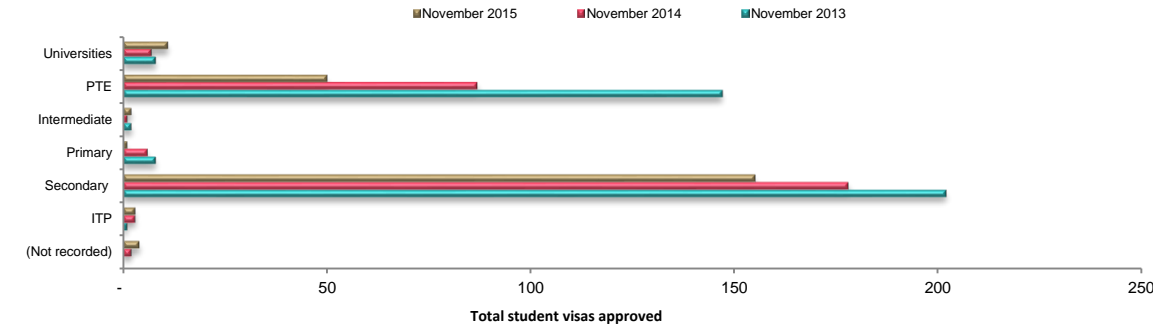
Japan: Total student visas issued by sector, YTD



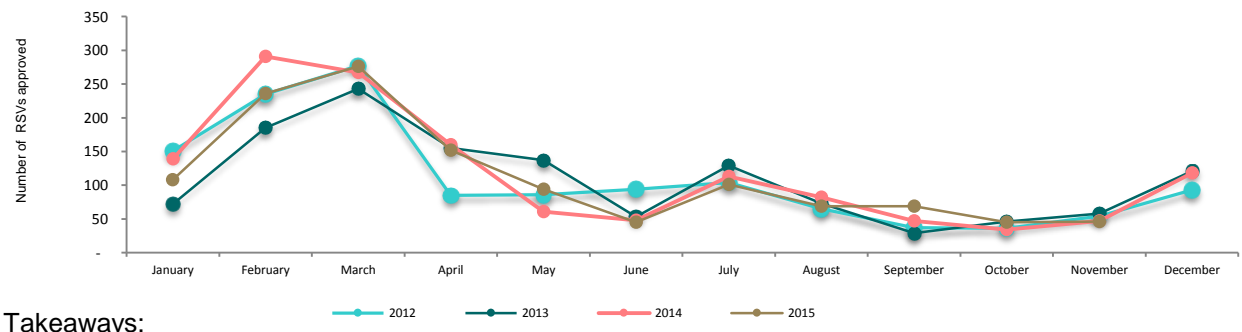
Japan: First time student visas (FSV), 2012 - 2015



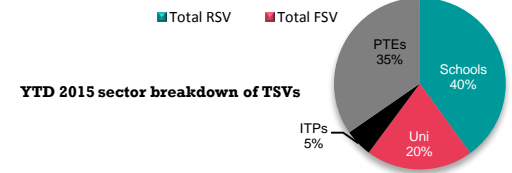
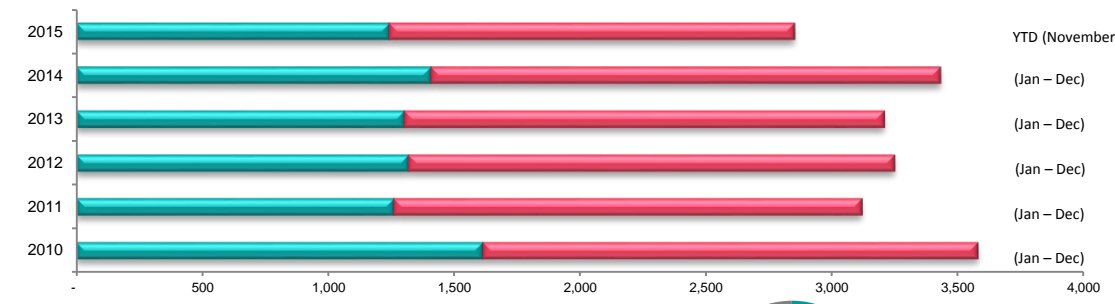
Japan: Total student visas issued by sector, November



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



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



Takeaways:

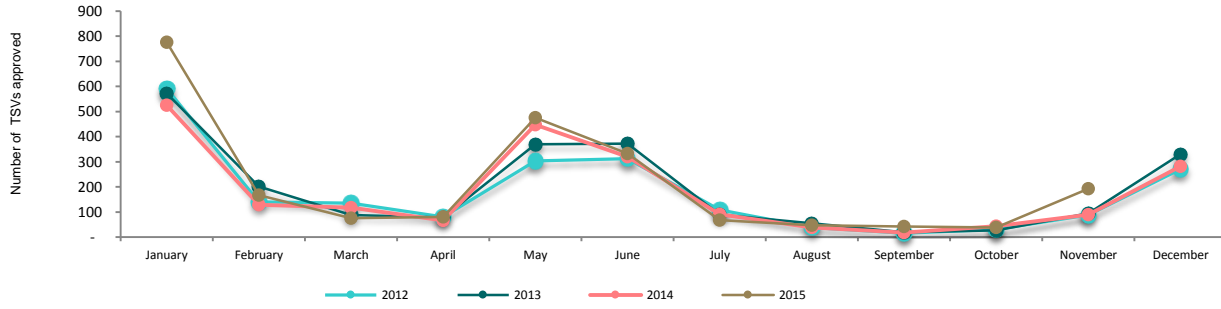
- November results were mixed with FSVs down 24% (-57) and RSVs flat down 2% (-1).
- Japan has experienced flat results YTD for FSVs 0% (-3) and TSVs down 2% (-51).

United States of America:

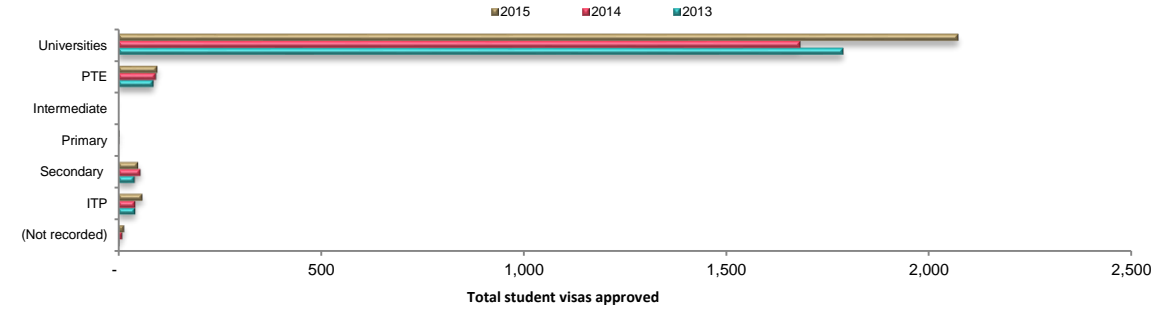
November RSV	November FSV	November TSV
↓ -1 -8%	↑ 104 133%	↑ 103 114%

YTD RSV	YTD FSV	YTD TSV
↓ -22 -7%	↑ 434 28%	↑ 412 22%

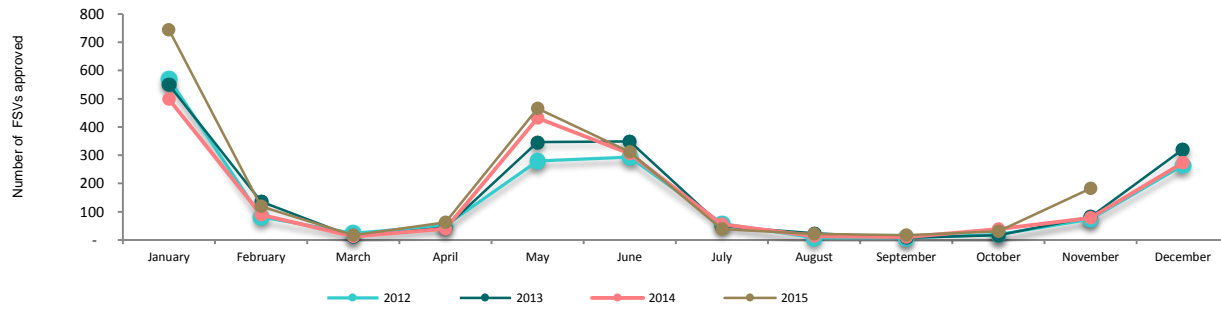
USA: Total student visas (TSV), 2012 - 2015



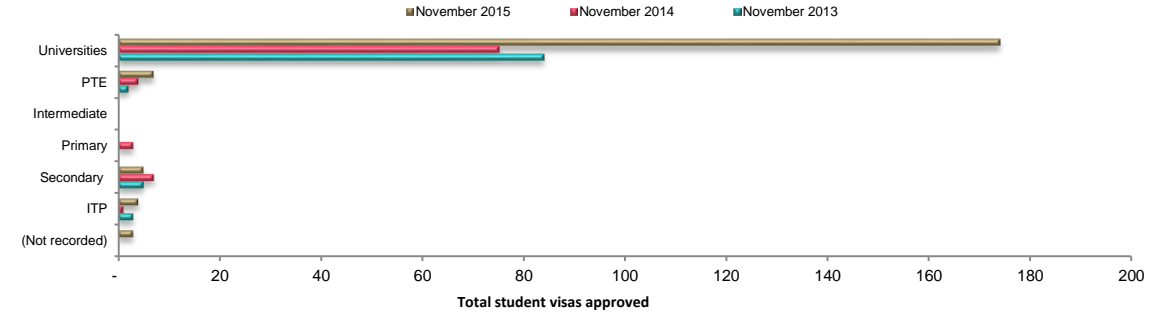
USA: Total student visas issued by sector, YTD



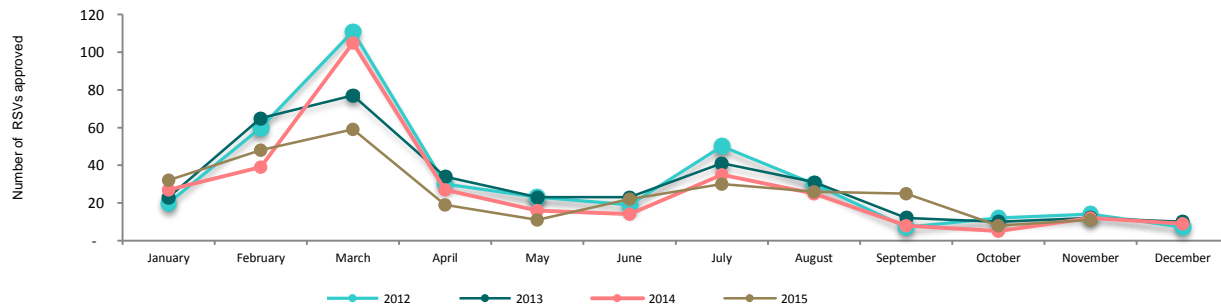
USA: First time student visas (FSV), 2012 - 2015



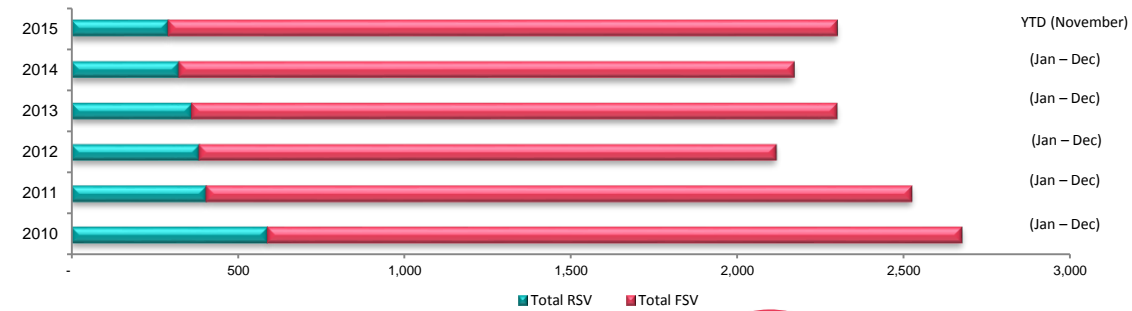
USA: Total student visas issued by sector, November



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



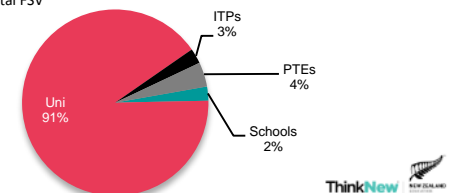
USA: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- The USA has shown strong growth this year, increasing YTD TSVs by 22% (412) and FSVs up 28% (434).
- The majority of growth is from the university sector up 23% (390) TSVs YTD.

YTD 2015 sector breakdown of TSVs



Latin America:

November RSV
 ↑ 2 5%

November FSV
 ↑ 101 86%

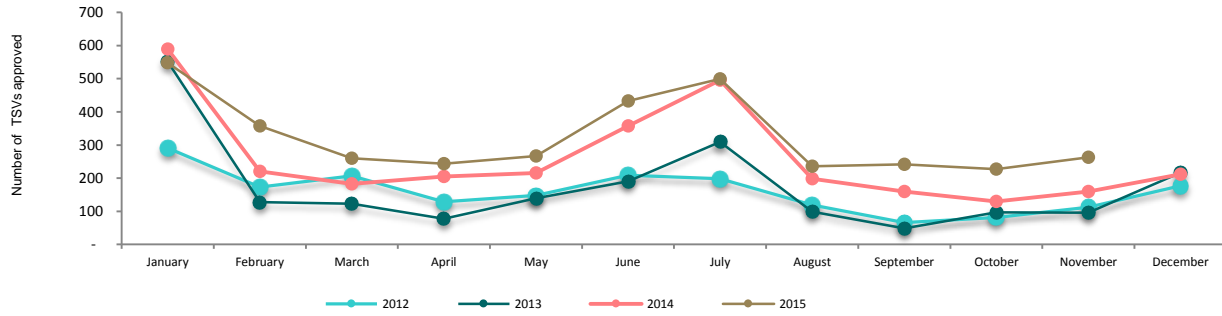
November TSV
 ↑ 103 64%

YTD RSV
 ↑ 205 41%

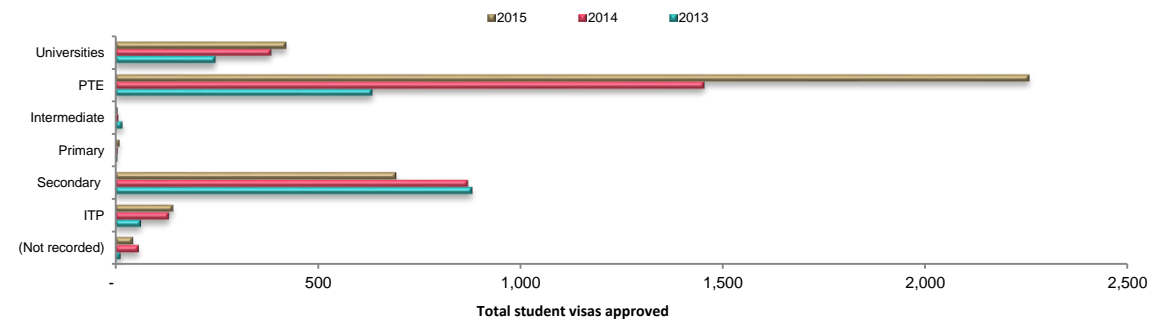
YTD FSV
 ↑ 458 19%

YTD TSV
 ↑ 663 23%

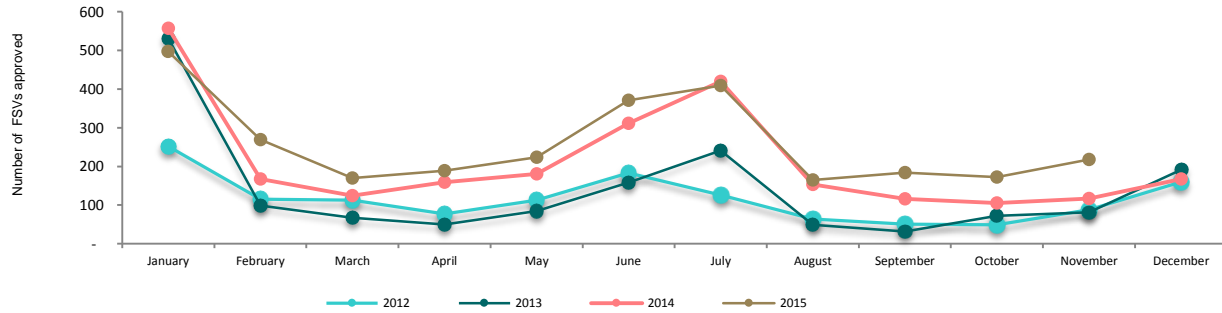
Latin America: Total student visas (TSV), 2012 - 2015



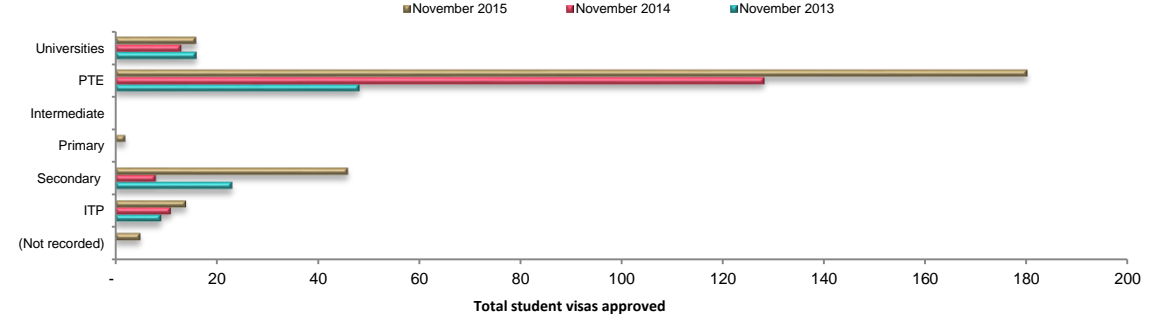
Latin America: Total student visas issued by sector, YTD



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



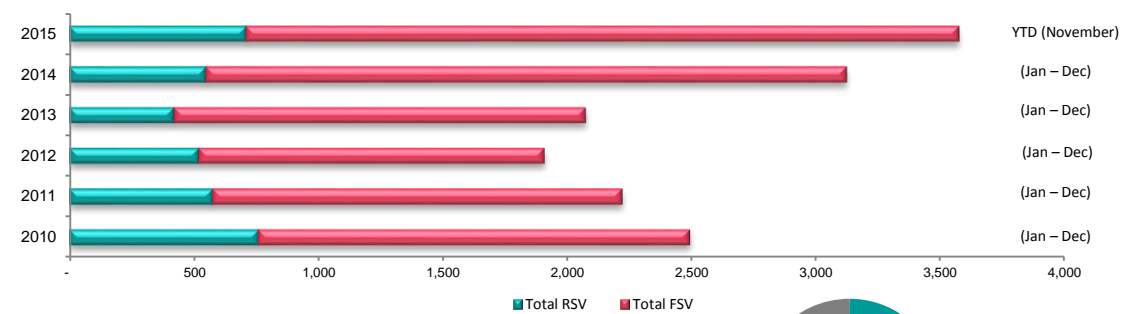
Latin America: Total student visas issued by sector, November



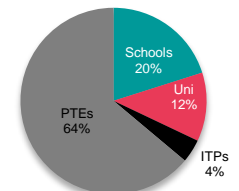
Latin America: Renewed student visas (RSV), 2012 - 2015



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



YTD 2015 sector breakdown of TSVs



Takeaways:

- Latin America has shown strong YTD growth, with RSVs up by 41% (205) and FSVs up by 19% (458).
- November was a strong month, with RSVs up 5% (2) and FSVs up 86% (101).
- YTD FSVs growth has been concentrated within the PTE sector, up 54% (650).

November RSV
 November FSV
 November TSV

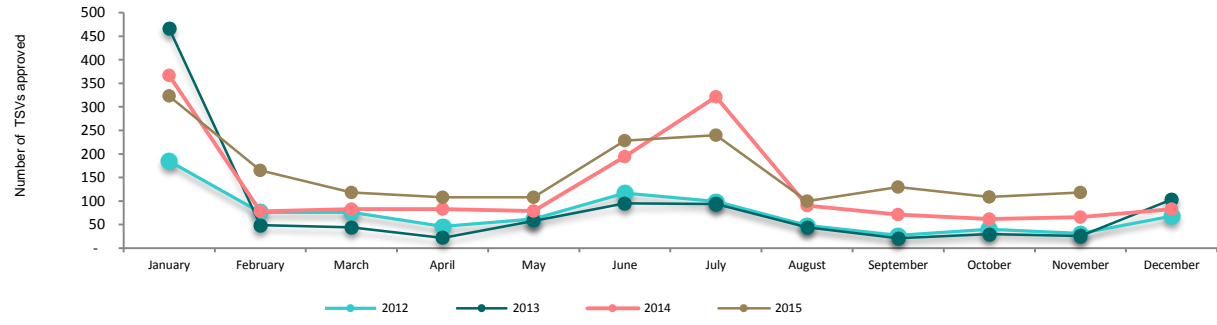
↓ -7 -37%
 ↑ 59 126%
 ↑ 52 79%

YTD RSV
 YTD FSV
 YTD TSV

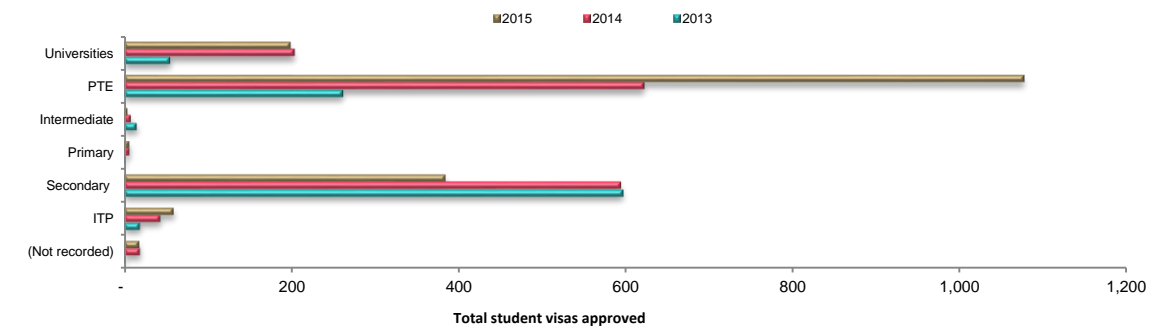
↑ 90 43%
 ↑ 163 13%
 ↑ 253 17%

YTD (January to November)

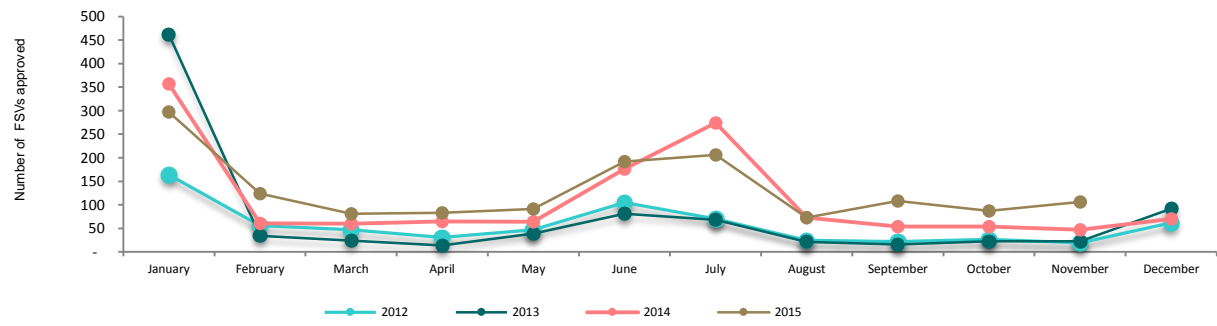
Brazil: Total student visas (TSV), 2012 - 2015



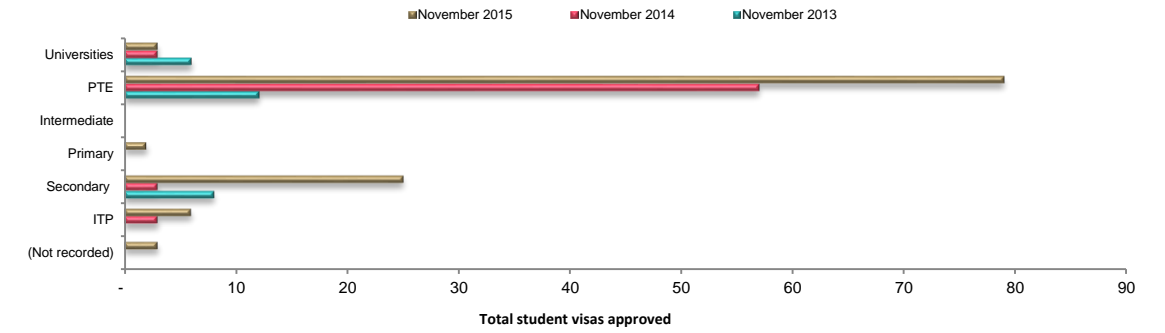
Brazil: Total student visas issued by sector, YTD



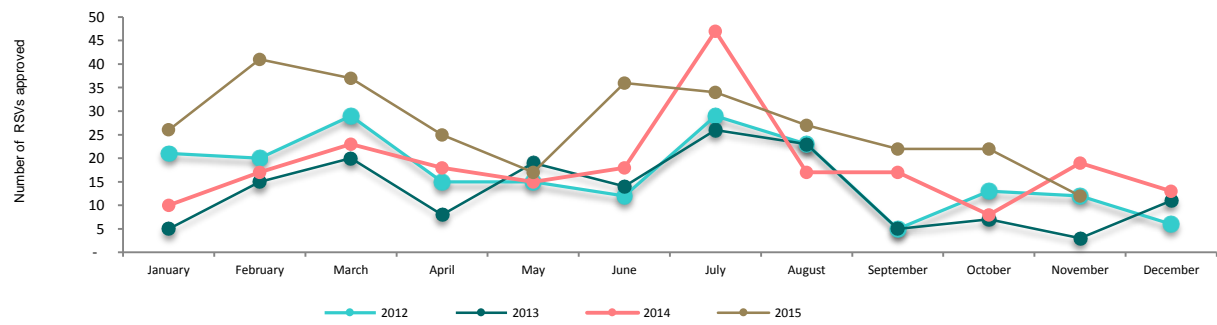
Brazil: First time student visas (FSV), 2012 - 2015



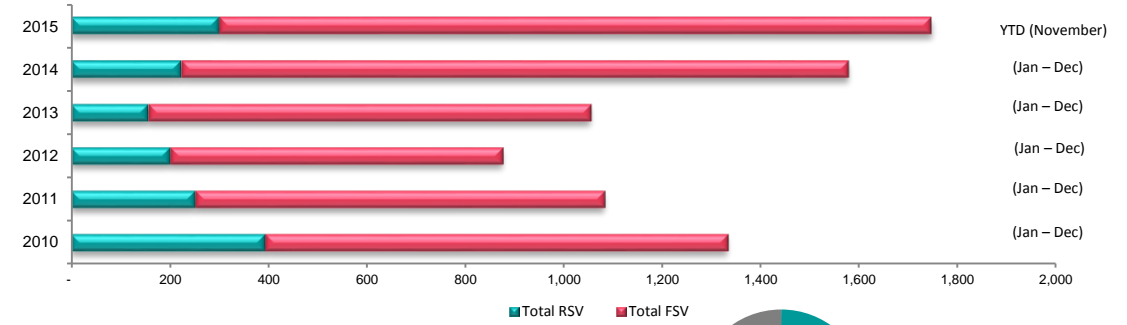
Brazil: Total student visas issued by sector, November



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



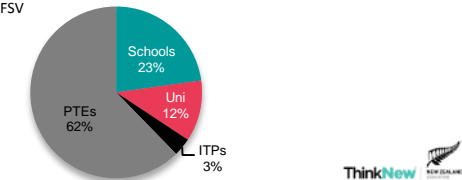
Brazil: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- Brazil continues to experience strong growth YTD TSVs are up 17% (253) and FSVs 13% (163).
- The PTE sector has shown strong growth YTD, up 73% (456). In contrast, the secondary school sector is down 35% (-209) YTD. This is driven by a reduction in the number of Pernambuco students arriving in July 2015, compared to July 2014.

YTD 2015 sector breakdown of TSVs



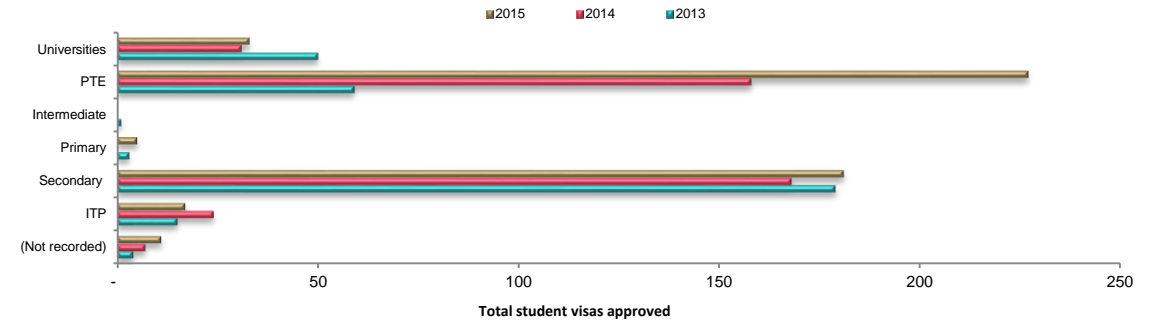
November RSV	November FSV	November TSV
➡ 1 0%	⬆ 27 540%	⬆ 28 560%

YTD RSV	YTD FSV	YTD TSV
⬆ 5 10%	⬆ 80 24%	⬆ 85 22%

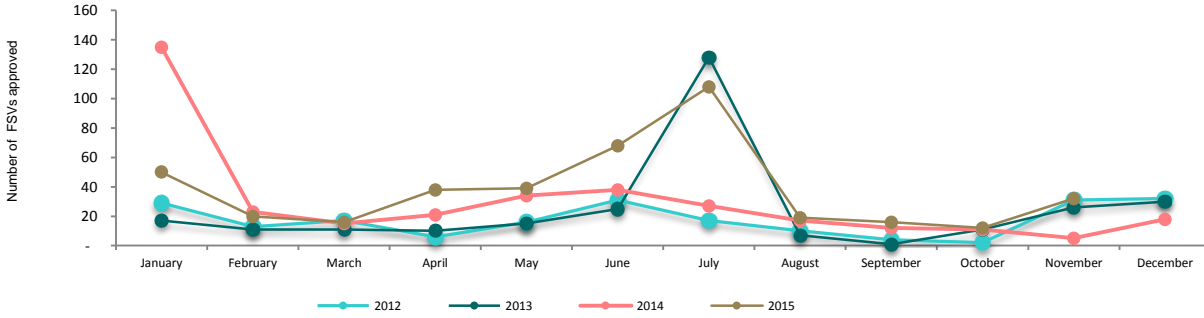
Chile: Total student visas (TSV), 2012 - 2015



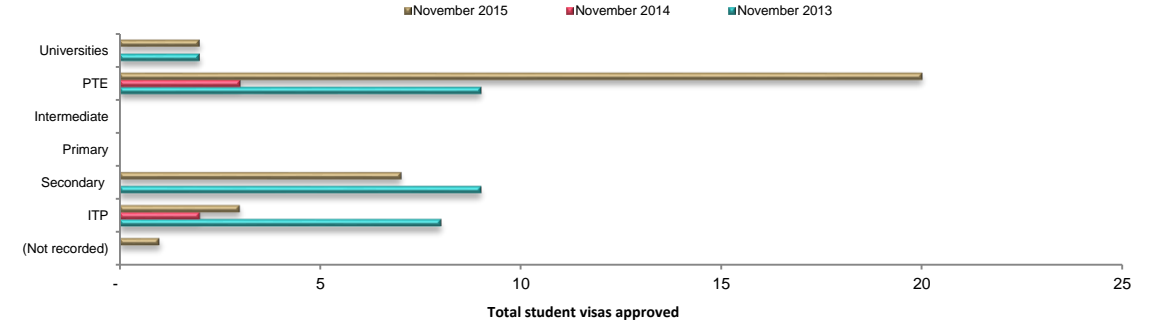
Chile: Total student visas issued by sector, YTD



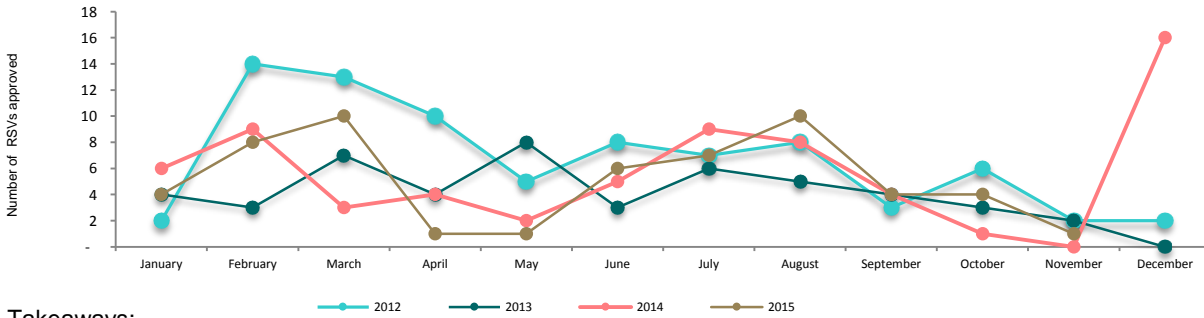
Chile: First time student visas (FSV), 2012 - 2015



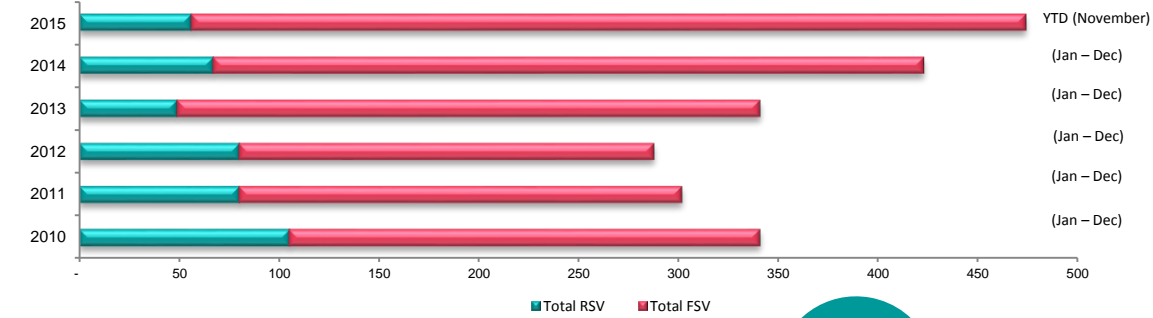
Chile: Total student visas issued by sector, November



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



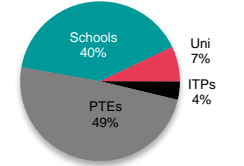
Chile: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- YTD TSVs are up 22% (85), driven by a 24% (80) increase in FSVs.
- YTD, the PTE sector has experienced strong growth in TSVs, up 44% (69).

YTD 2015 sector breakdown of TSVs

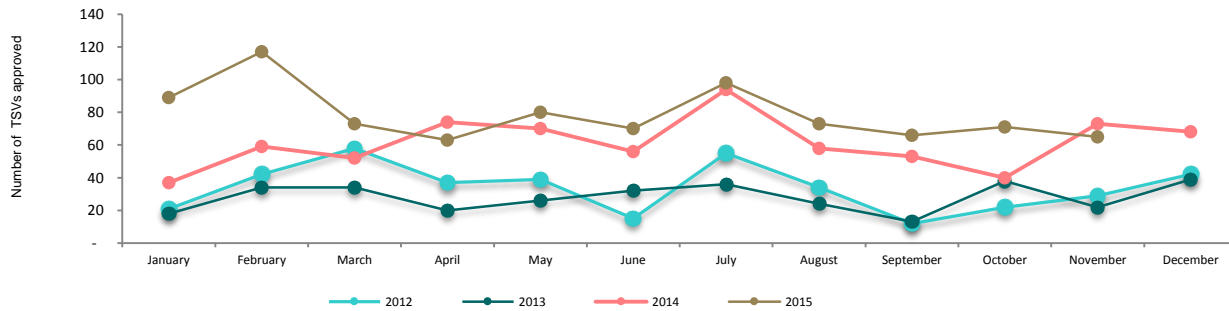


November RSV **November FSV** **November TSV**
 ➡ 0 0% ⬇ -8 -15% ⬇ -8 -11%

YTD RSV **YTD FSV** **YTD TSV**
 ⬆ 89 71% ⬆ 110 20% ⬆ 199 30%

YTD (January to November)

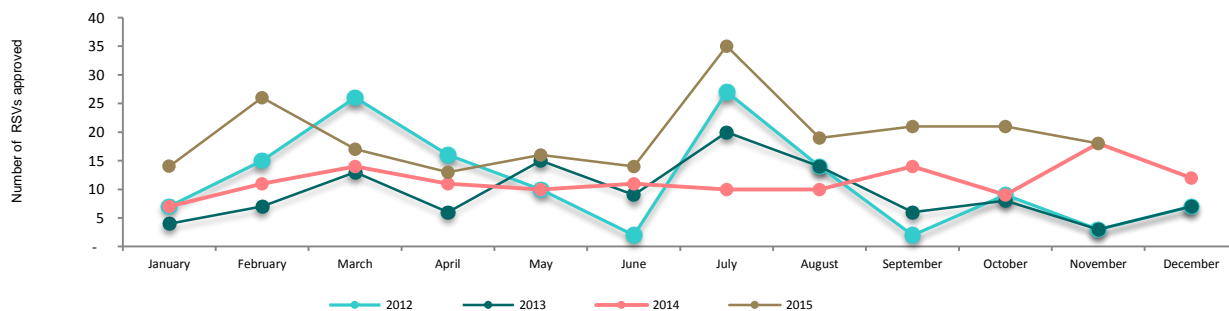
Colombia: Total student visas (TSV), 2012 - 2015



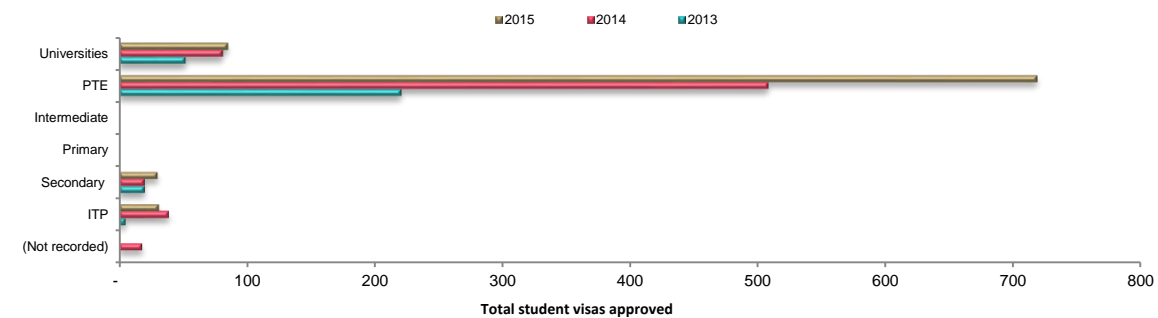
Colombia: First time student visas (FSV), 2012 - 2015



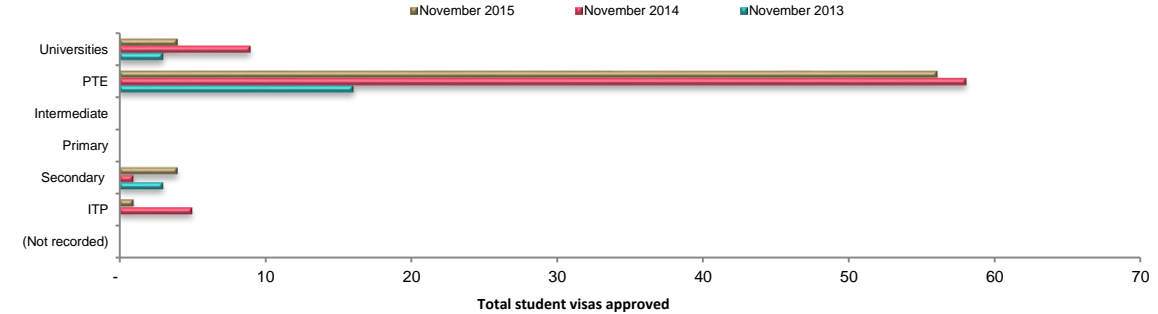
Colombia: Renewed student visas (RSV), 2012 - 2015



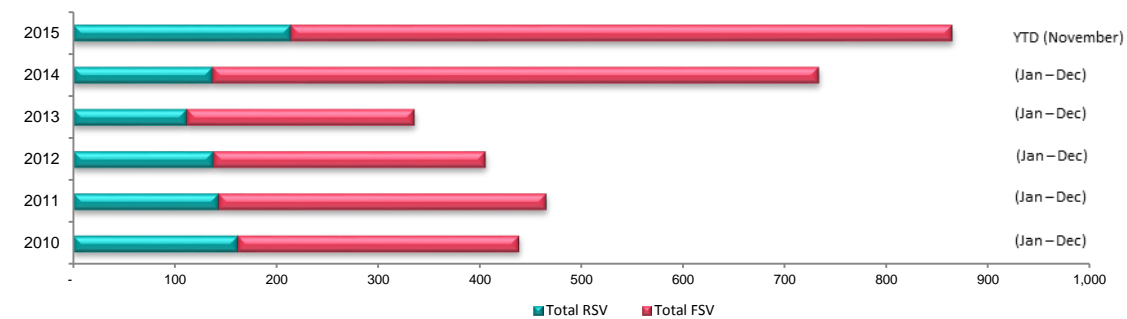
Colombia: Total student visas issued by sector, YTD



Colombia: Total student visas issued by sector, November



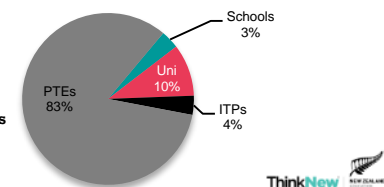
Colombia: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- YTD TSVs are up 30% (199) and FSVs up 20% (110).
- 83% of YTD TSVs have been in the PTE sector.

YTD 2015 sector breakdown of TSVs



Middle East:

November RSV
 ↓ -13 -14%

November FSV
 ↓ -19 -30%

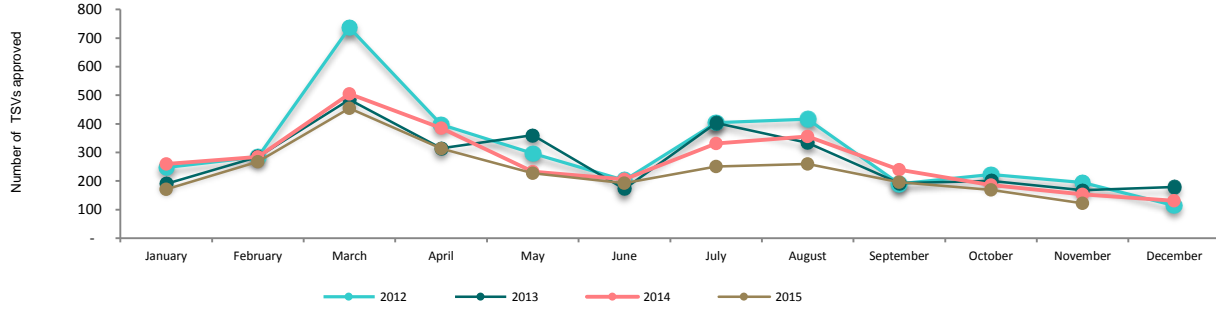
November TSV
 ↓ -32 -21%

YTD RSV
 ↓ -267 -11%

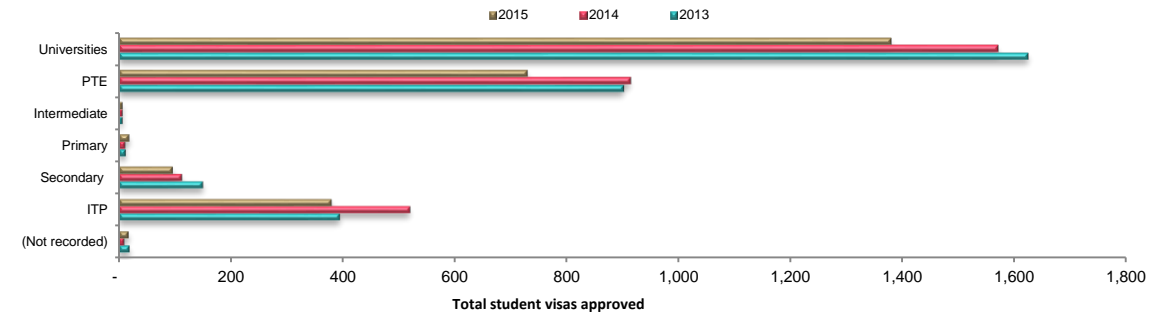
YTD FSV
 ↓ -247 -33%

YTD TSV
 ↓ -514 -16%

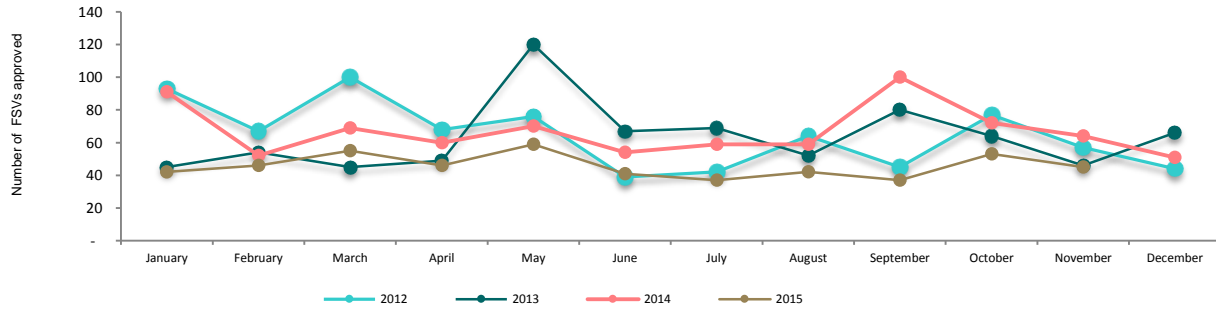
Middle East: Total student visas (TSV), 2012 - 2015



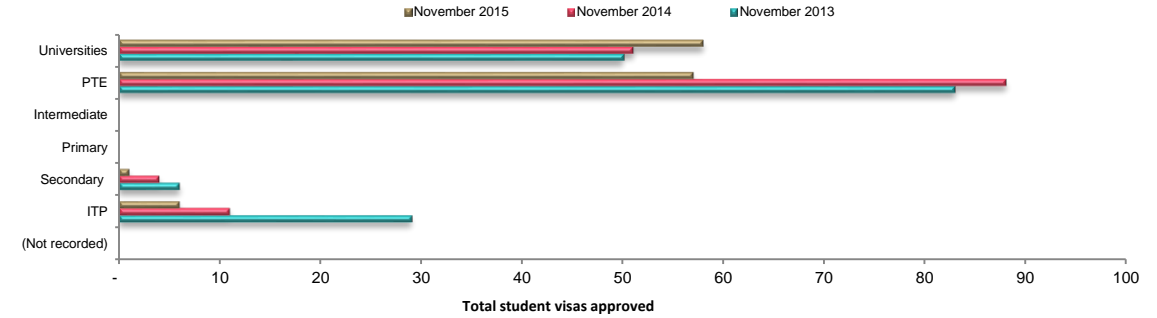
Middle East: Total student visas issued by sector, YTD



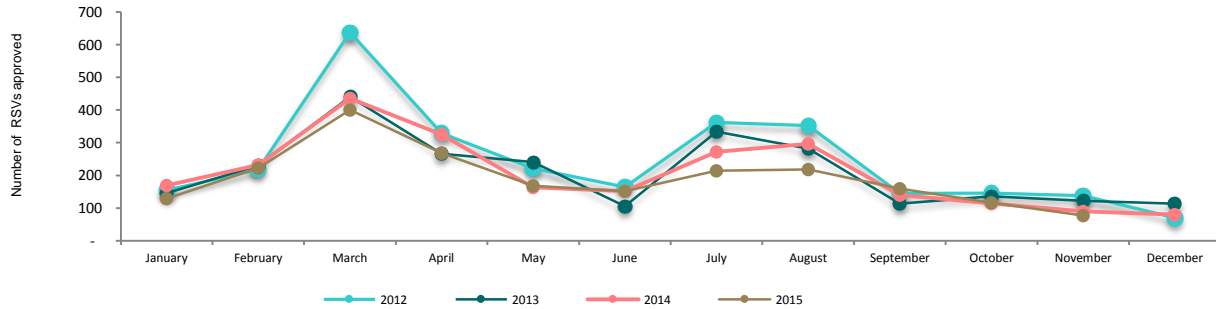
Middle East: First time student visas (FSV), 2012 - 2015



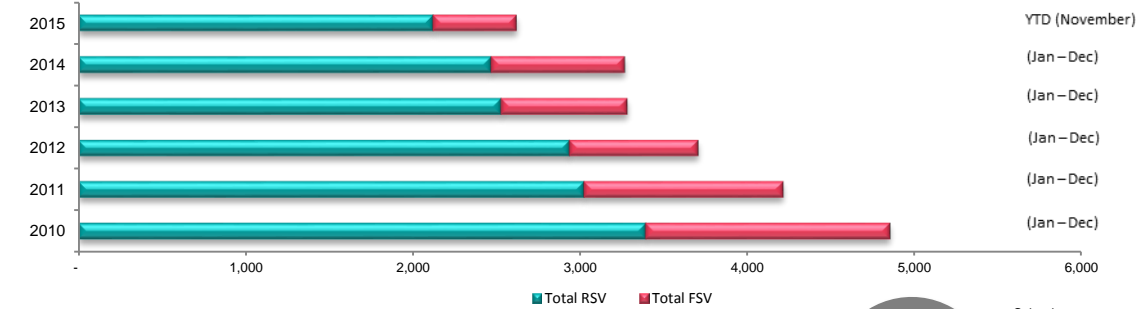
Middle East: Total student visas issued by sector, November



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



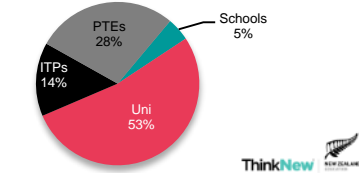
Middle East: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- This region continues to experience negative results. YTD TSV are down 16% (-514) and FSV down 33% (-247).
- November results were down with FSVs 30% (-19) and RSVs down 14% (-13).

YTD 2015 sector breakdown of TSVs

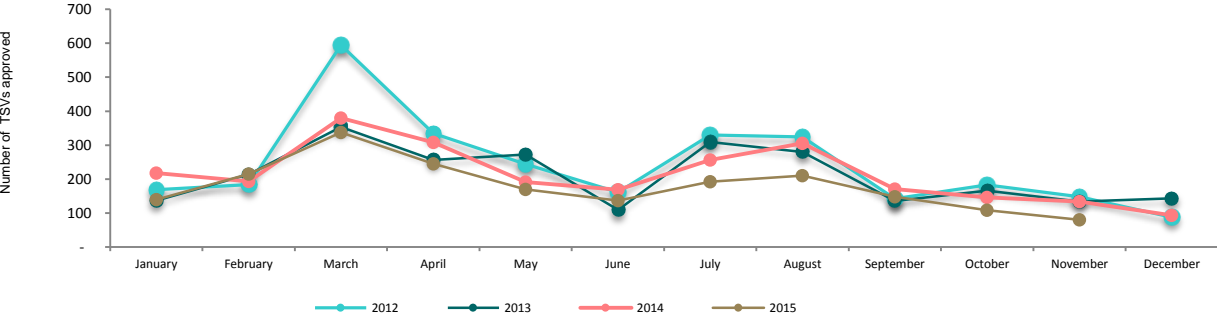


Saudi Arabia:

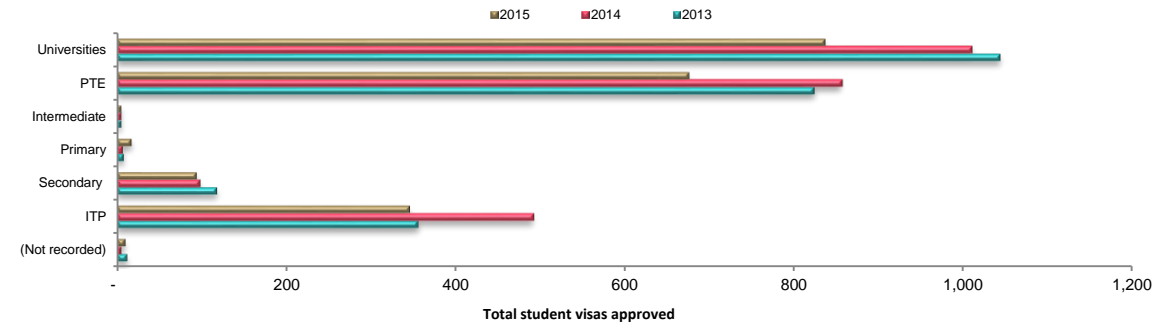
November RSV	November FSV	November TSV
↓ -26 -33%	↓ -28 -50%	↓ -54 -40%

YTD RSV	YTD FSV	YTD TSV
↓ -249 -13%	↓ -241 -44%	↓ -490 -20%

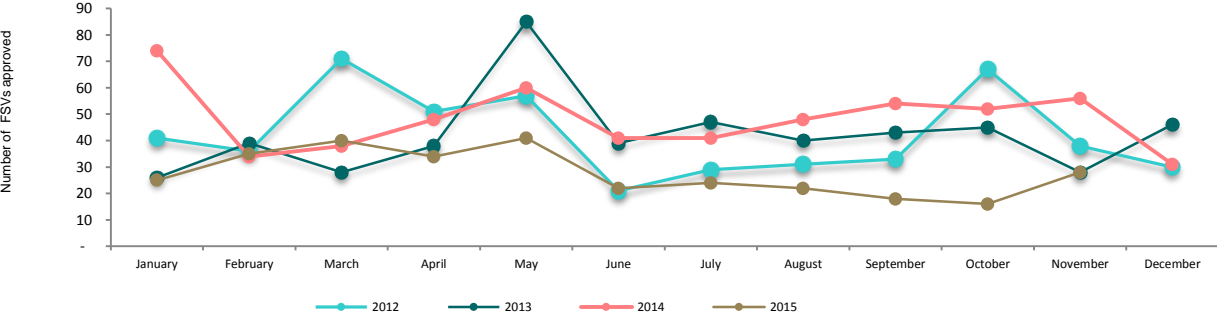
Saudi Arabia: Total student visas (TSV), 2012 - 2015



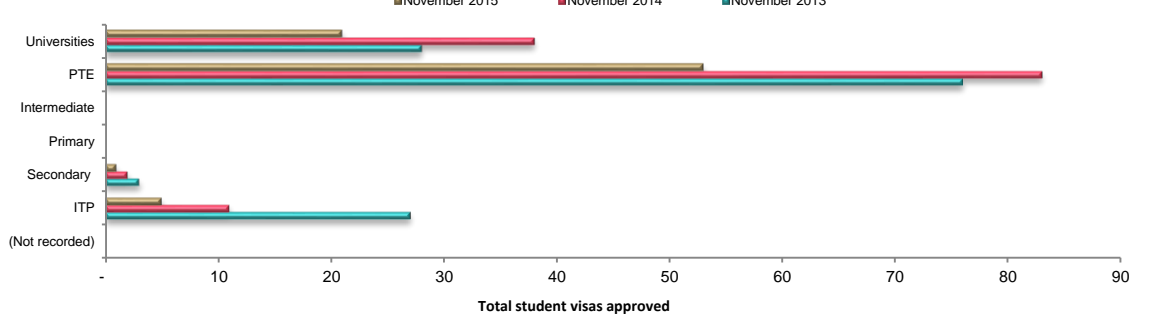
Saudi Arabia: Total student visas issued by sector, YTD



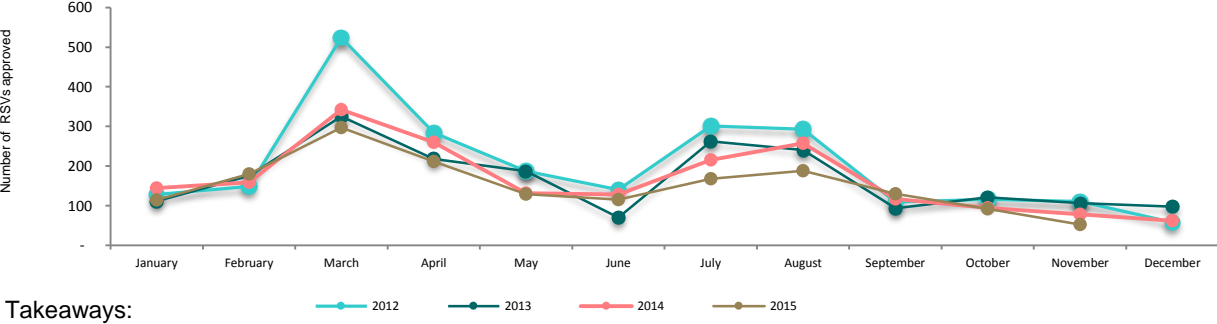
Saudi Arabia: First time student visas (FSV), 2012 - 2015



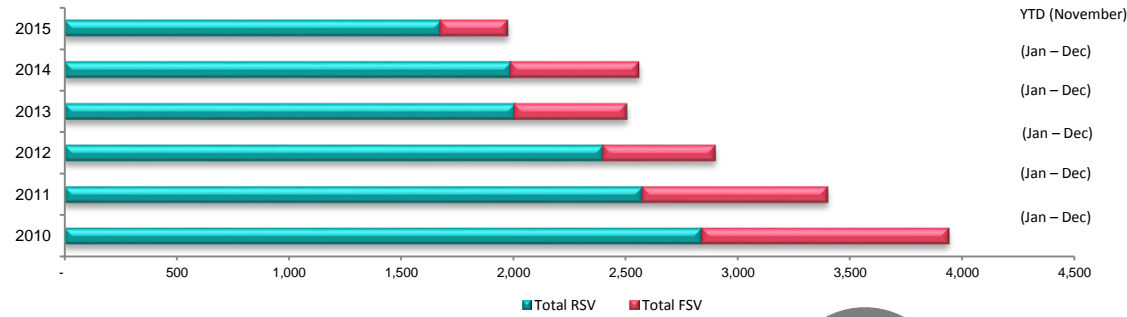
Saudi Arabia: Total student visas issued by sector, November



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

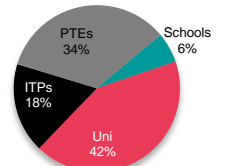


Saudi Arabia: Cumulative total for RSV vs. FSV, 2010 - 2015



- Takeaways:**
- This market continues to experience negative month-on-month results. November results were down FSVs 50% (-28) and RSVs down 33% (-26).
 - YTD the university sector accounts for 42% and the ITP sector 18% of TSVs approved.

YTD 2015 sector breakdown of TSVs

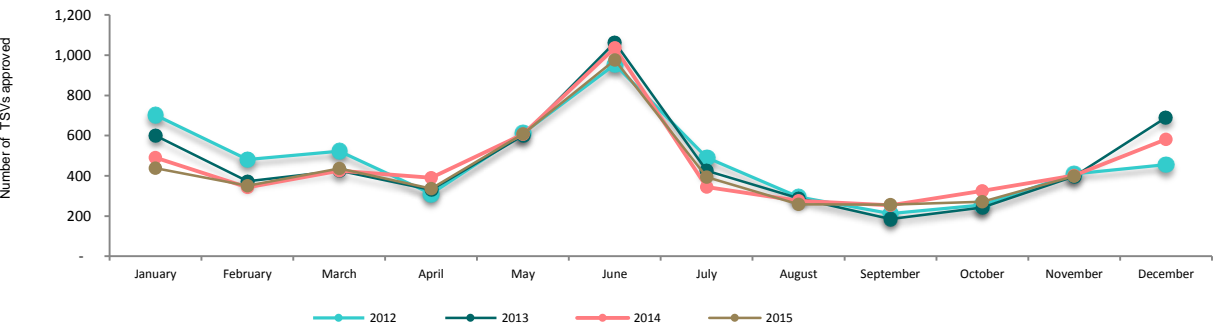


Europe:

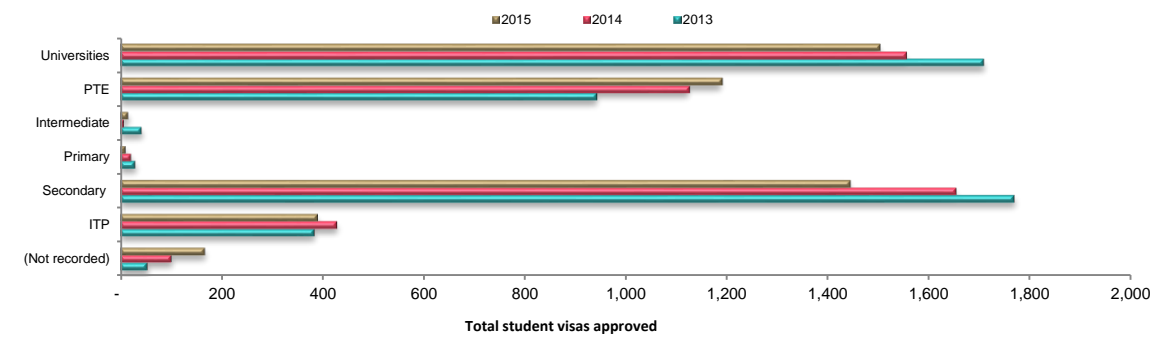
November RSV -6 -11% **November FSV** 2 1% **November TSV** -4 -1%

YTD RSV -41 -3% **YTD FSV** -131 -4% **YTD TSV** -172 -4%

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



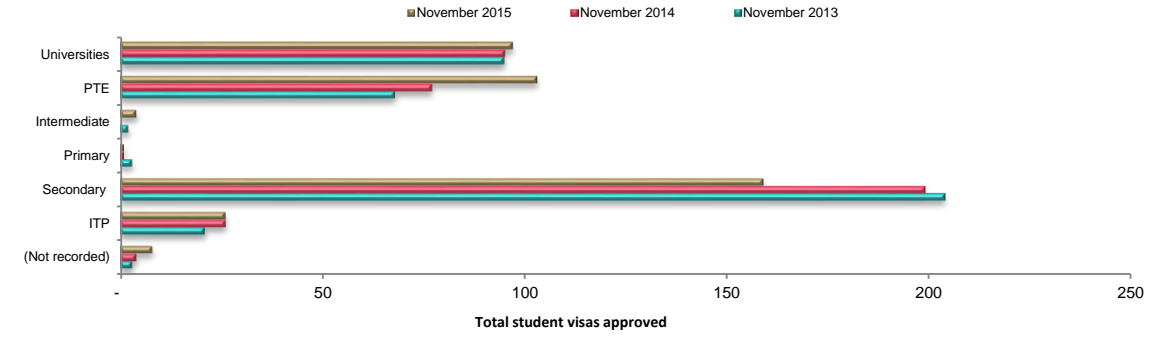
Europe: Total student visas issued by sector, YTD



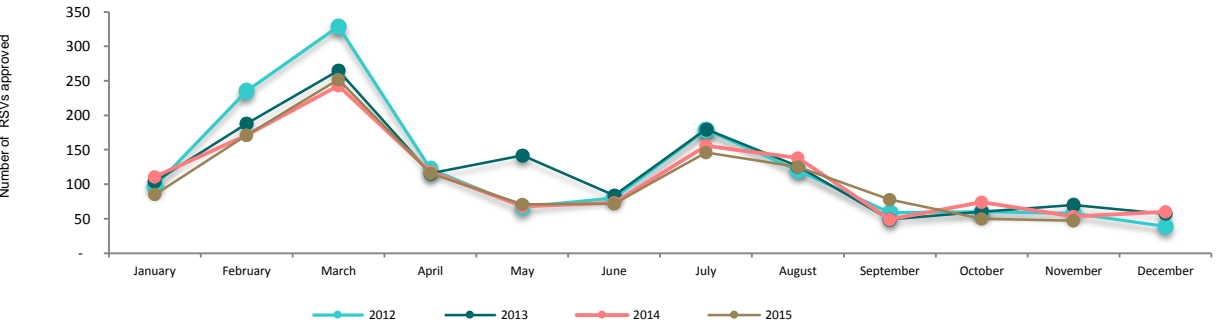
Europe: First time student visas (FSV), 2012 - 2015



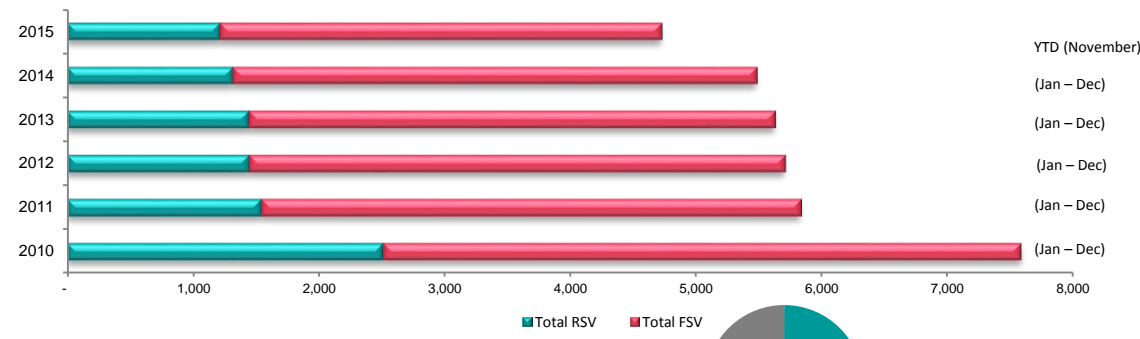
Europe: Total student visas issued by sector, November



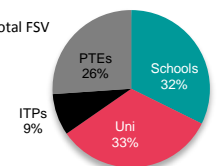
Europe: Renewed student visas (RSV), 2012 - 2015



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



YTD 2015 sector breakdown of TSVs



Takeaways:

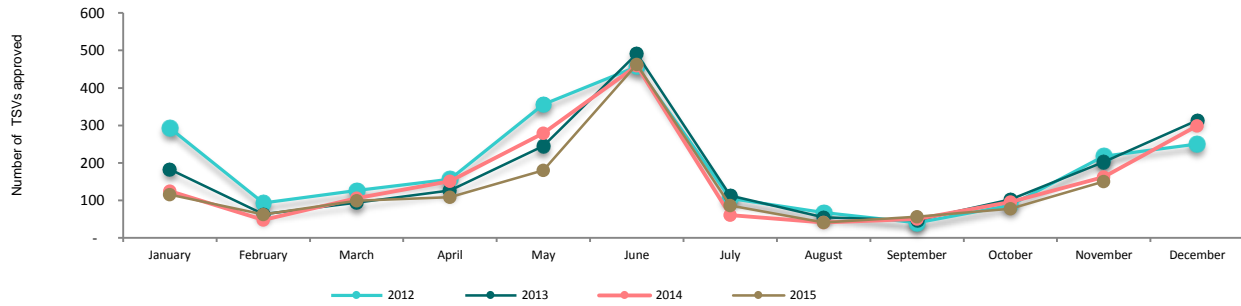
- YTD results from Europe are flat, TSV down 4% (-172) and FSVs down 4% (-131).
- November results were mixed with FSVs up 1% (2) and RSVs down 11% (-6).

Germany:

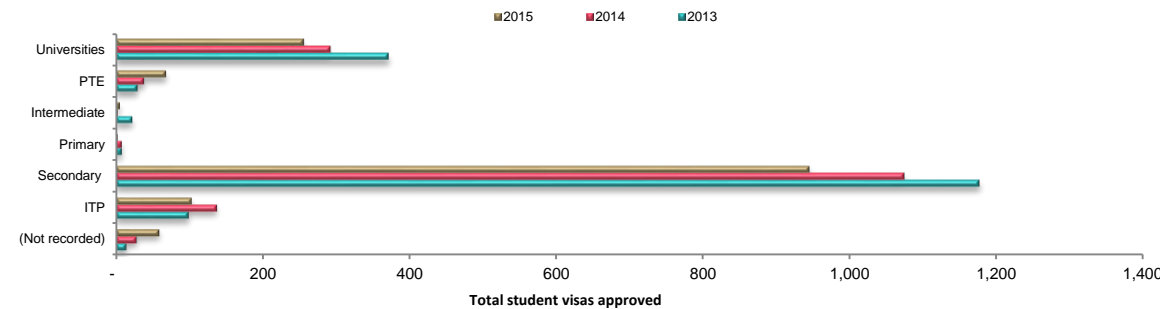
November RSV	November FSV	November TSV
↑ 6 50%	↓ -18 -12%	↓ -12 -7%

YTD RSV	YTD FSV	YTD TSV
↓ -36 -15%	↓ -104 -8%	↓ -140 -9%

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



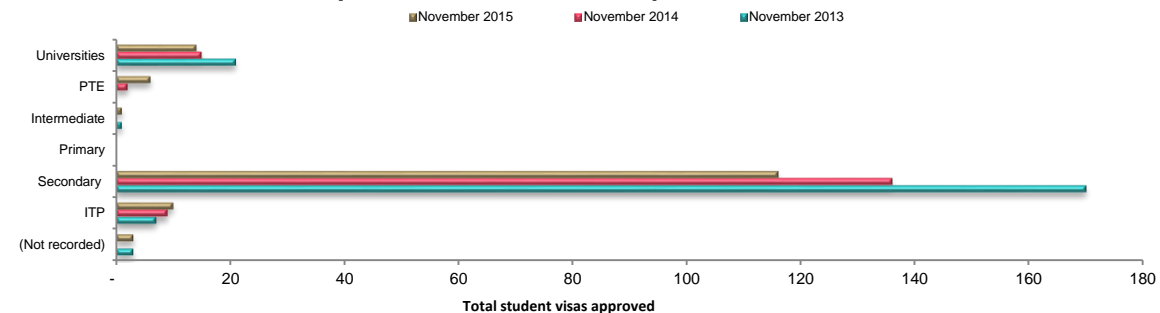
Germany: Total student visas issued by sector, YTD



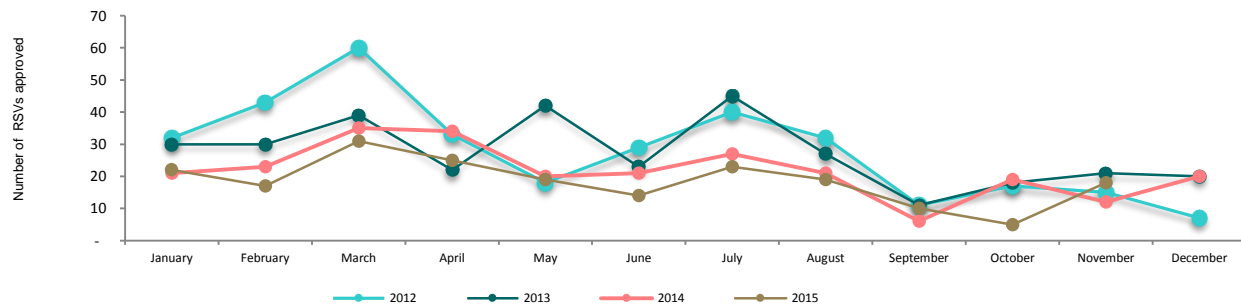
Germany: First time student visas (FSV), 2012 - 2015



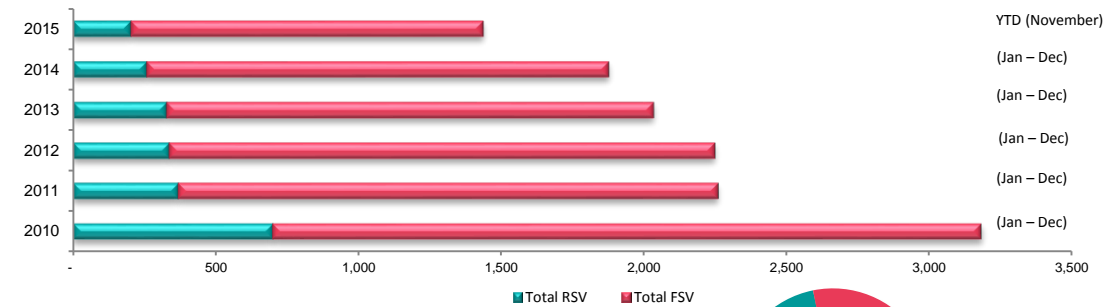
Germany: Total student visas issued by sector, November



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



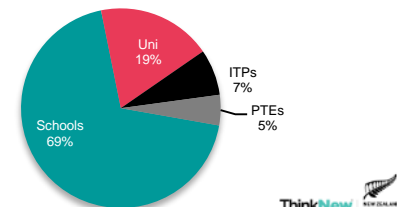
Germany: Cumulative total for RSV vs. FSV, 2010 - 2015



Takeaways:

- YTD trend has so far been negative, with FSVs down 8% (-104) and TSVs down 9% (-140).
- November delivered a negative result, with FSVs down 12% (-18) and TSVs down 7% (-12).
- Secondary Schools are down 12% (-129) in TSVs YTD.

YTD 2015 sector breakdown of TSVs



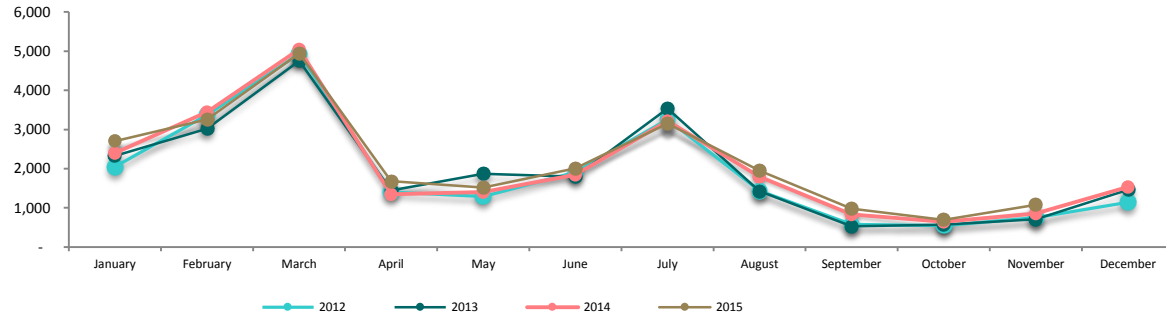
Overall: Sector overview

Universities:

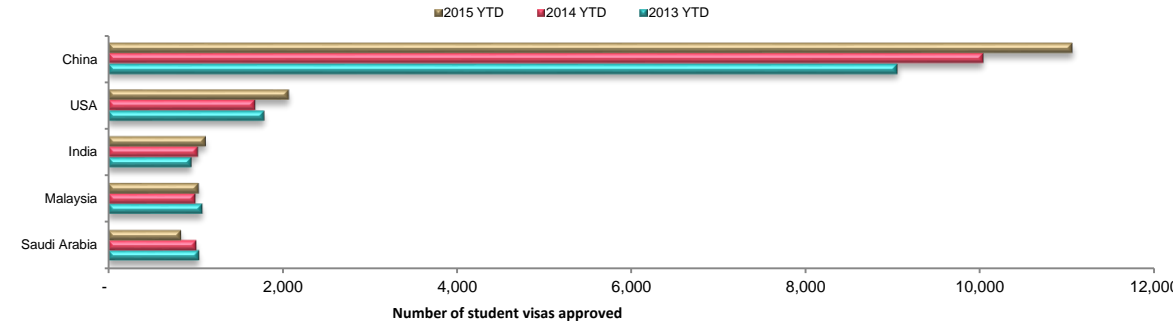
November RSV **November FSV** **November TSV**
 ↑ 110 42% ↑ 106 18% ↑ 216 25%

YTD RSV **YTD FSV** **YTD TSV**
 → 469 3% ↑ 649 8% ↑ 1,118 5%

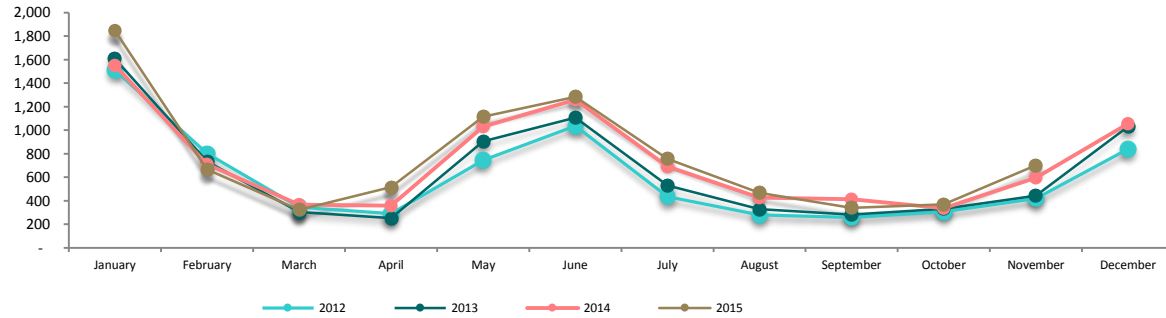
University: Total student visas (TSV), 2012 - 2015



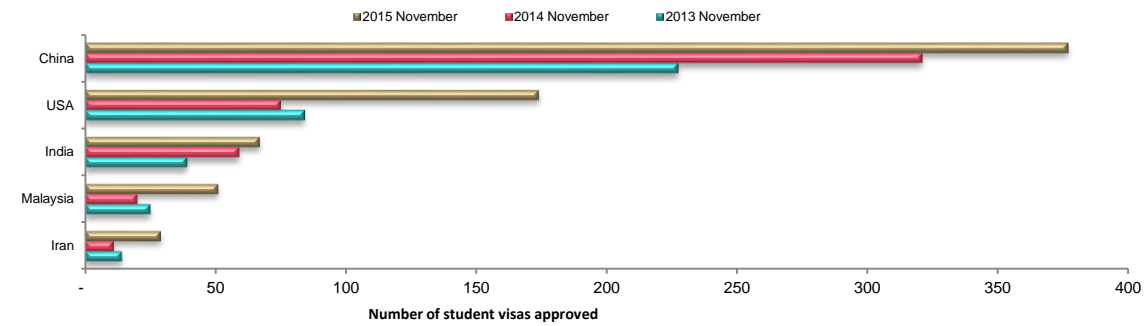
University: Total student visas issued by country, YTD



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



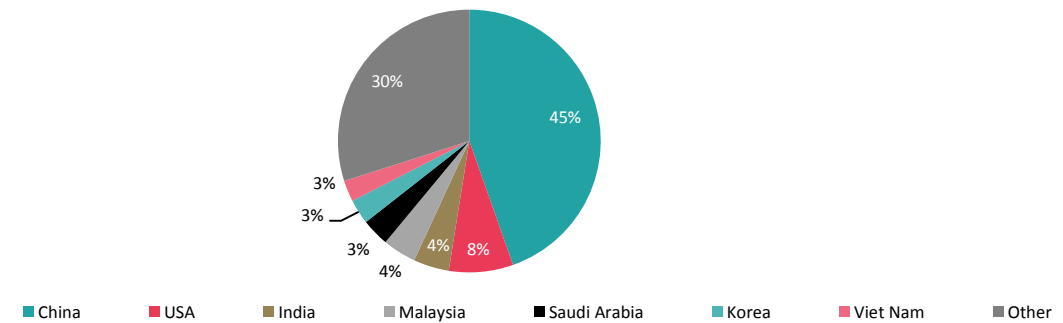
University: Total student visas issued by country, November



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



YTD 2015 country breakdown of TSVs



Takeaways:

- YTD, China comprises 45% TSVs approved in this sector.
- China and the USA continue to show strong growth, up 10% (1,025) and 23% (389) TSVs YTD.

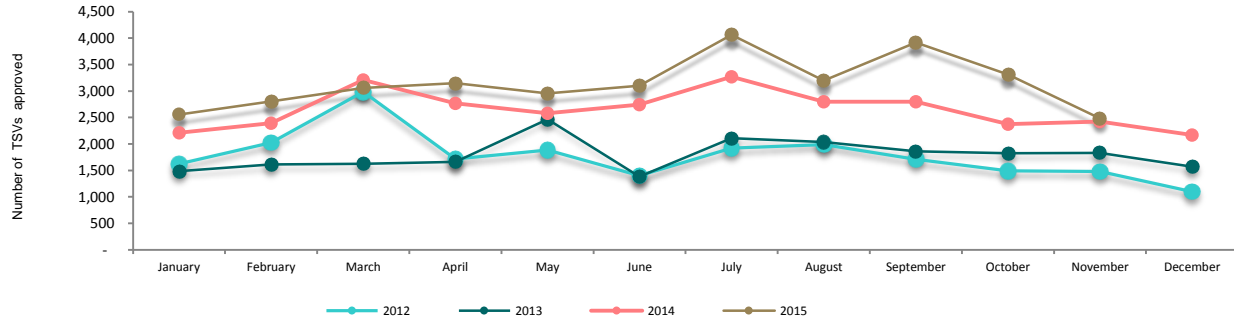
Private Training Establishments (PTE):



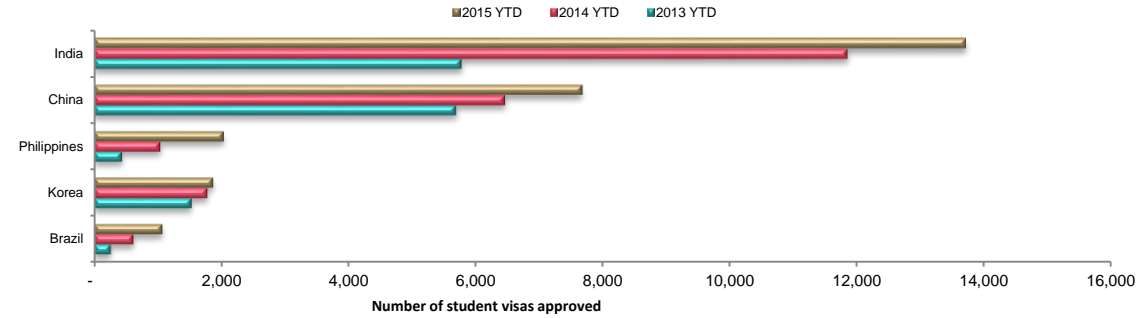
November RSV	November FSV	November TSV
↑ 105 11%	→ -46 -3%	→ 59 2%

YTD RSV	YTD FSV	YTD TSV
↑ 3,520 29%	↑ 1,513 9%	↑ 5,033 17%

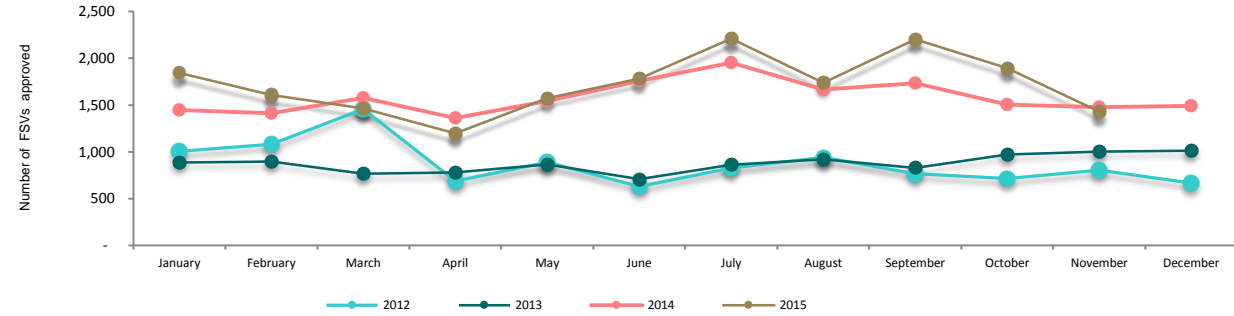
PTE: Total student visas (TSV), 2012 - 2015



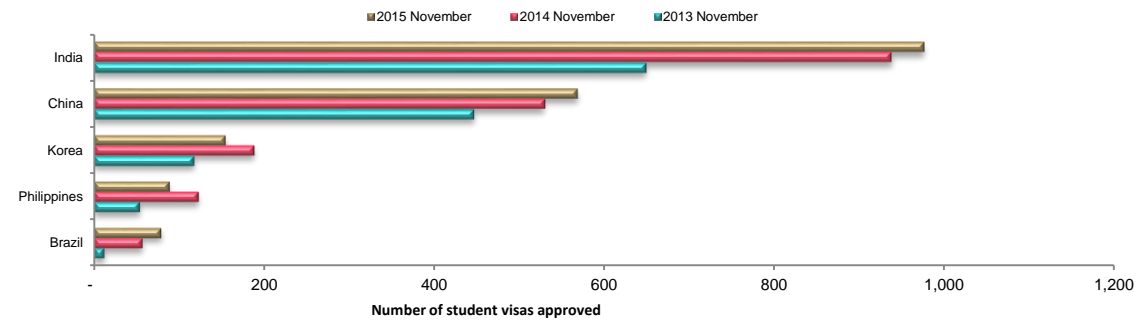
PTE: Total student visas issued by country, YTD



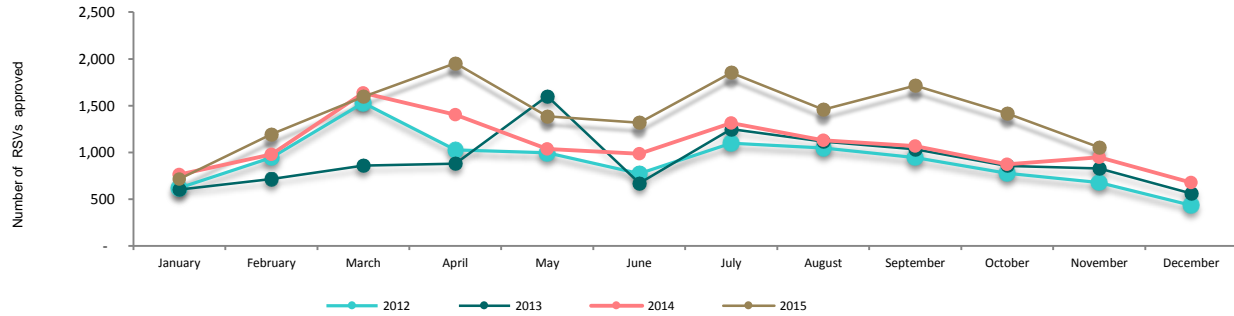
PTE: First time student visas (FSV), 2012 - 2015



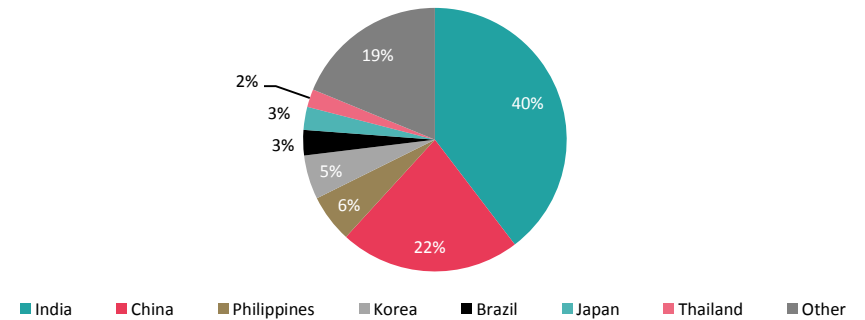
PTE: Total student visas issued by country, November



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



YTD 2015 country breakdown of TSVs



Takeaways:

- YTD TSVs continue to experience strong growth, up 17% (5,033) and FSVs up 9% (1,513).
- FSV growth has been driven by India, China, and the Philippines together comprising 68% of all PTE approvals.
- November results were mixed, with FSVs flats down 3% (-46) and RSVs up 11% (105).

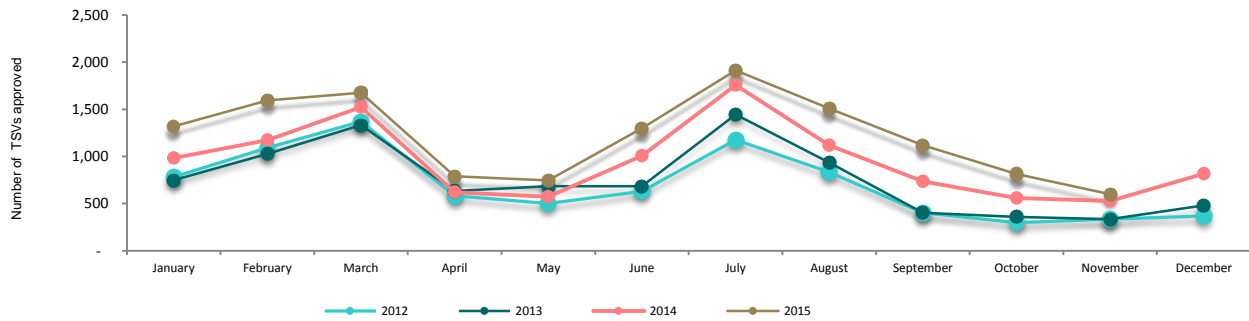
Institutes of Technology and Polytechnics (ITPs):



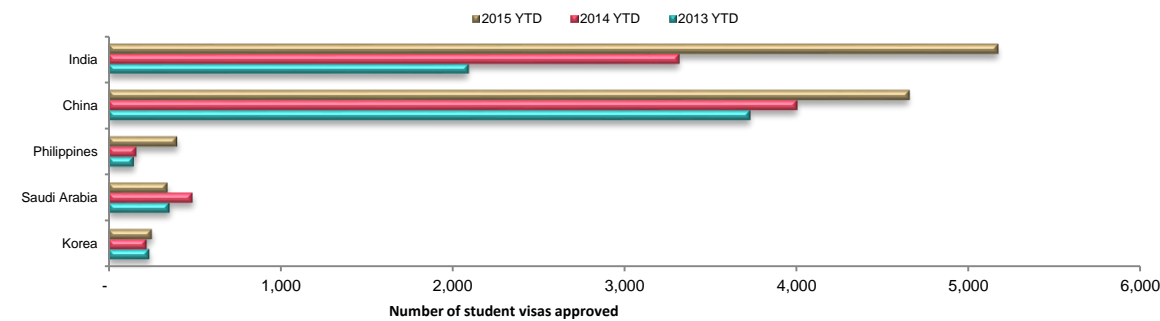
November RSV ↑ 61 58%
 November FSV → 12 3%
 November TSV ↑ 73 14%

YTD RSV ↑ 842 15%
 YTD FSV ↑ 1,952 41%
 YTD TSV ↑ 2,794 26%

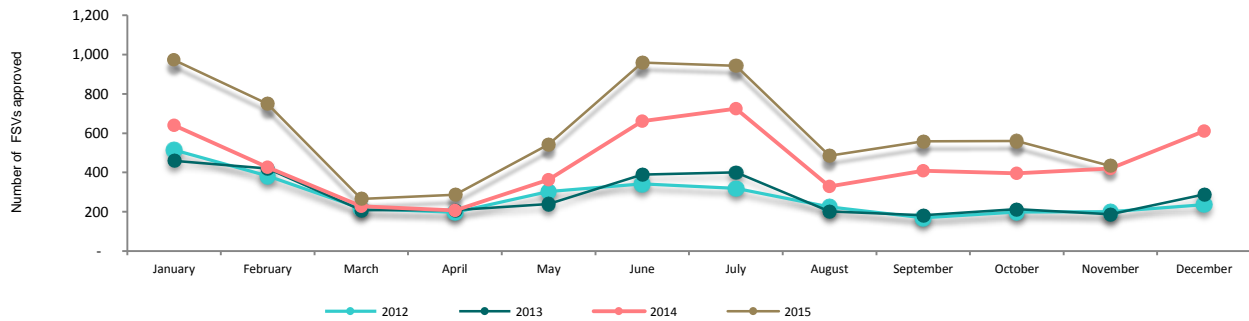
ITP: Total student visas (TSV), 2012 - 2015



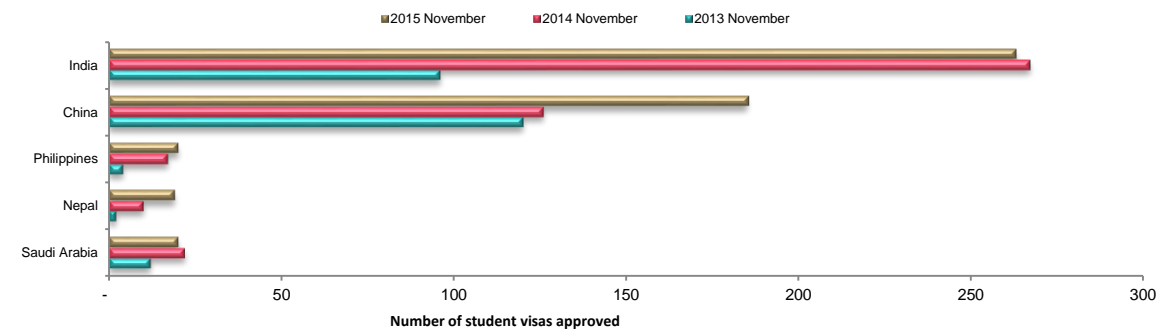
ITP: Total student visas issued by country, YTD



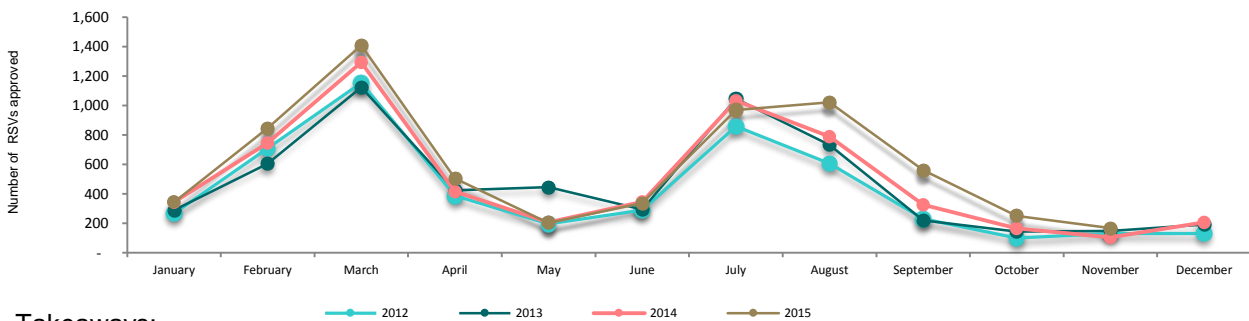
ITP: First time student visas (FSV), 2012 - 2015



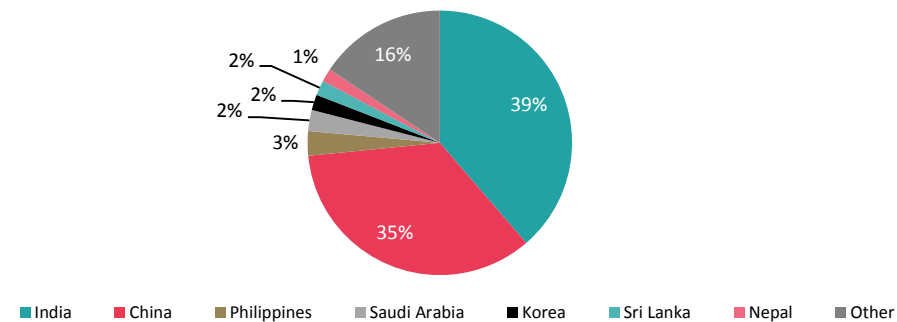
ITP: Total student visas issued by country, November



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



YTD 2015 country breakdown of TSVs



Takeaways:

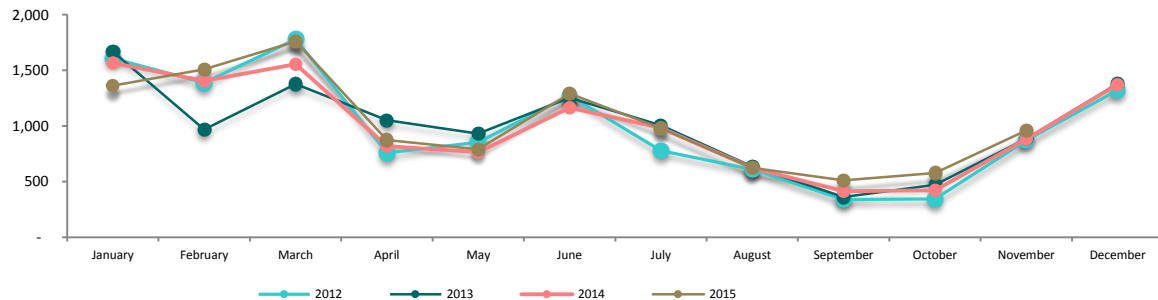
- YTD TSVs are growing strongly, up 26% (2,794) and FSVs, up 41% (1,952).
- India and China share 74% of TSVs year-to-date.
- November results had flat results in FSVs 3% (12) and up in RSV 58% (61).

Secondary Schools:

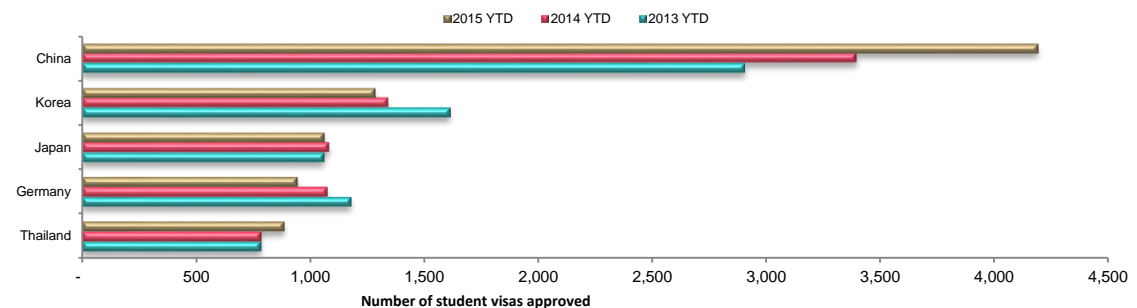
November RSV November FSV November TSV
↑ 28 11% ↑ 48 8% ↑ 76 9%

YTD RSV YTD FSV YTD TSV
↑ 529 10% → 108 2% ↑ 637 6%

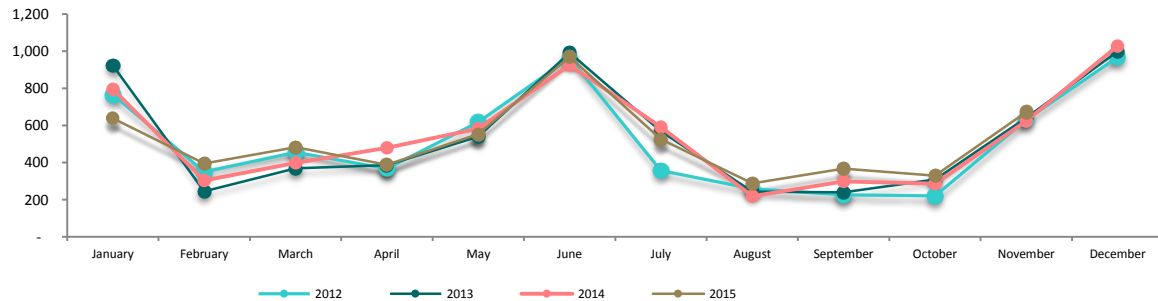
Secondary Schools: Total student visas (TSV), 2012 - 2015



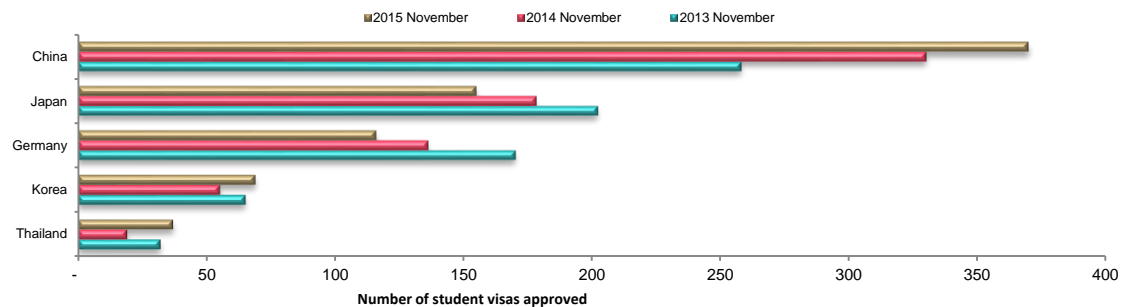
Secondary Schools: Total student visas issued by country, YTD



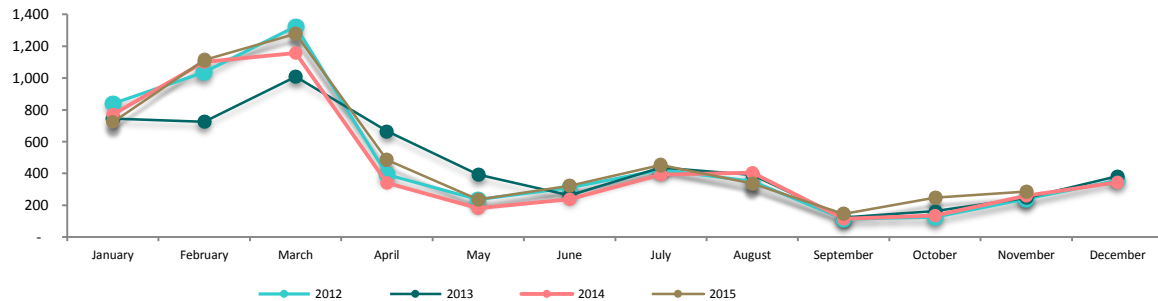
Secondary Schools: First time student visas (FSV), 2012 - 2015



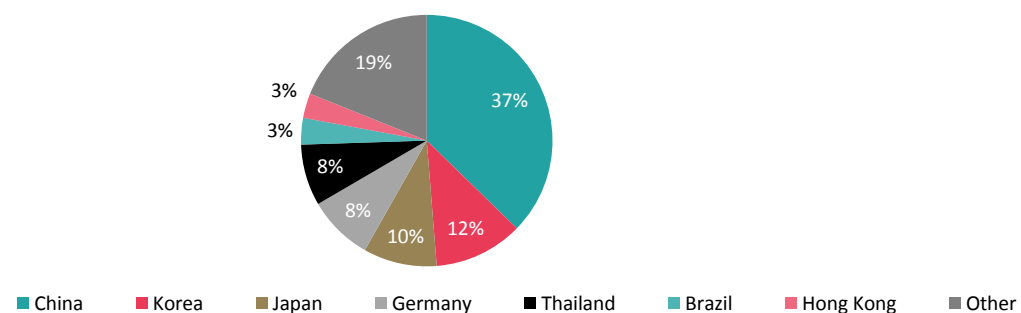
Secondary Schools: Total student visas issued by country, November



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



YTD 2015 country breakdown of TSVs



Takeaways:

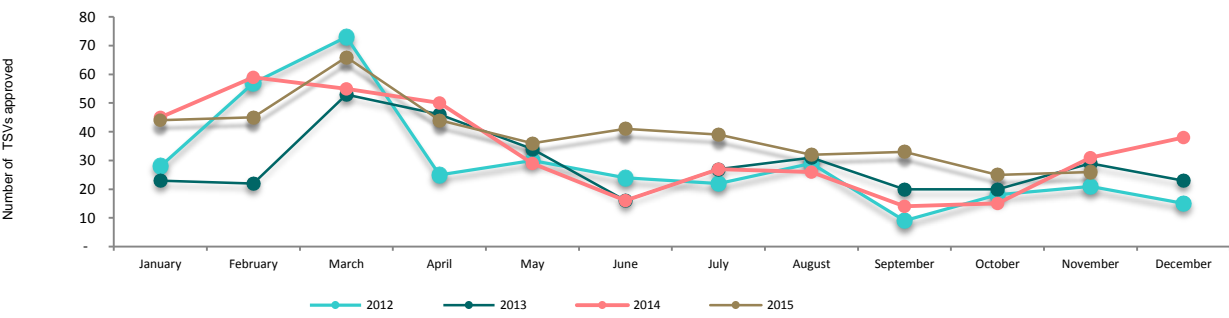
- YTD TSVs are up 6% (637) and FSVs are tracking flat, up 2% (108).
- November was a strong month, with FSVs up 8% (48) and TSVs up 9% (76).
- China is the largest contributor of TSVs YTD, with 37% of the total.

Primary Schools:

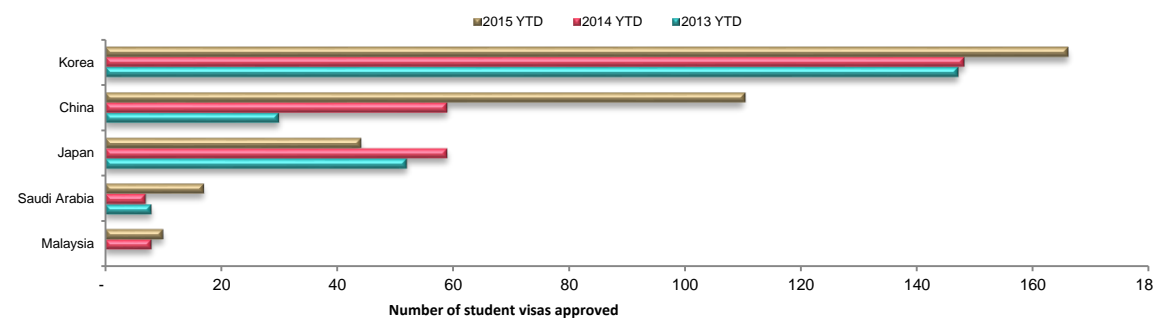
November RSV November FSV November TSV
↓ -2 -15% ↓ -3 -17% ↓ -5 -16%

YTD RSV YTD FSV YTD TSV
↑ 11 6% ↑ 53 27% ↑ 64 17%

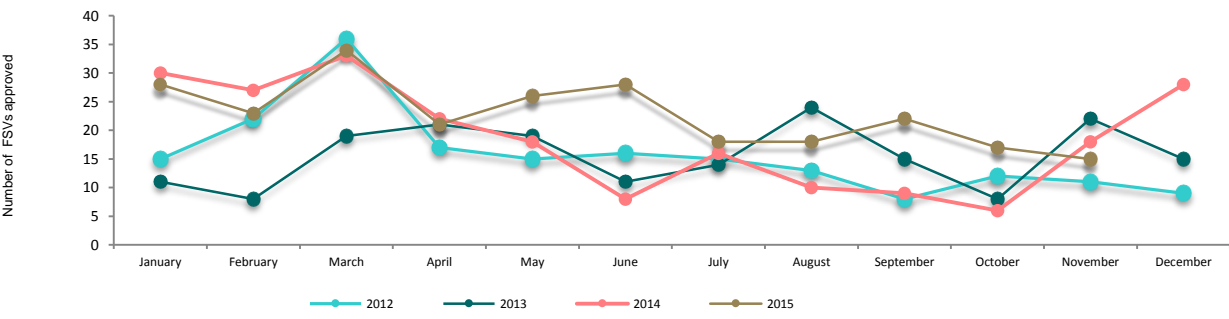
Primary Schools: Total student visas (TSV), 2012 - 2015



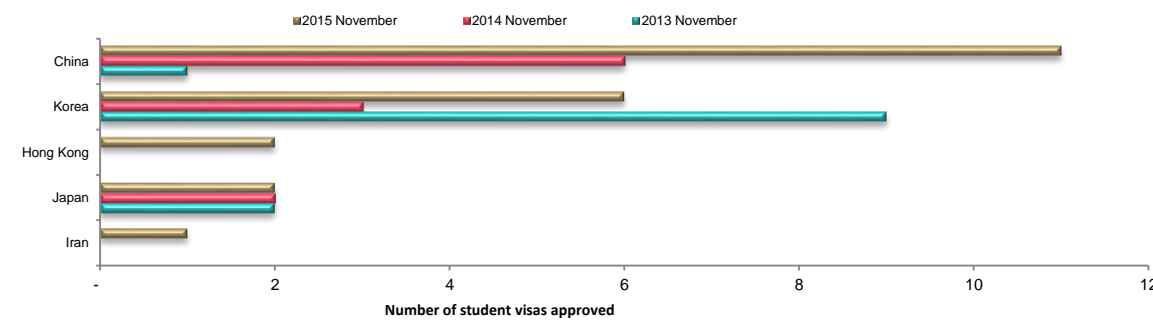
Primary Schools: Total student visas issued by country, YTD



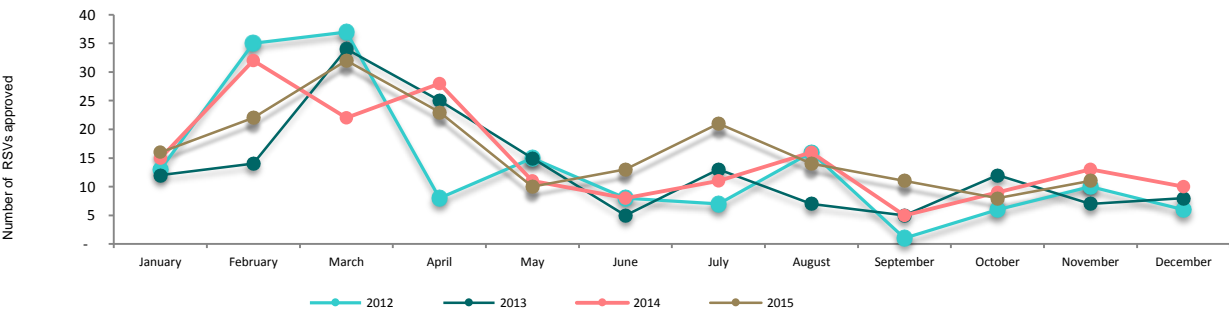
Primary Schools: First time student visas (FSV), 2012 - 2015



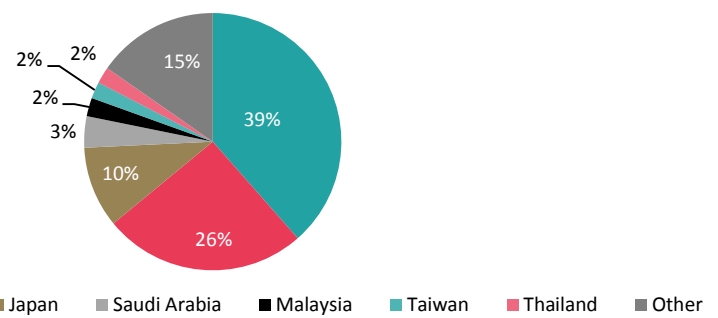
Primary Schools: Total student visas issued by country, November



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



YTD 2015 country breakdown of TSVs



Takeaways:

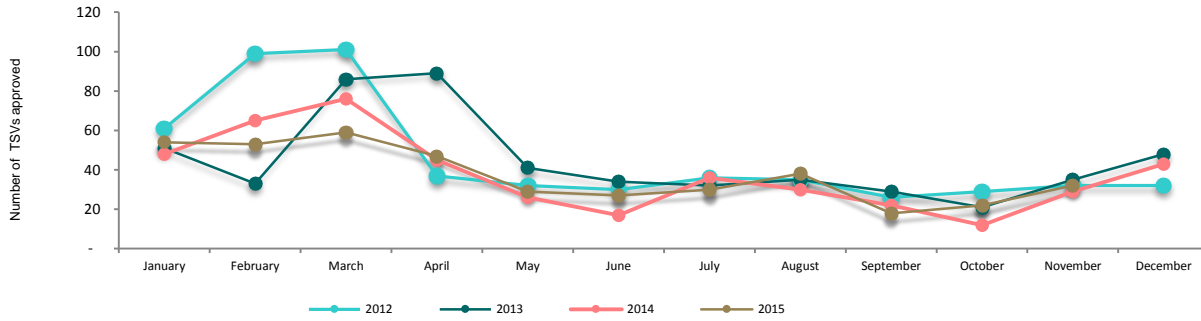
- YTD TSVs are growing strongly, up 17% (64) and FSVs up 27% (53).
- November results were down, with FSVs down 17% (-3) and TSVs down 16% (-5).
- Korea is the largest market for primary schools, comprising 39% of TSVs YTD; followed by China, with 26%.

Intermediate Schools:

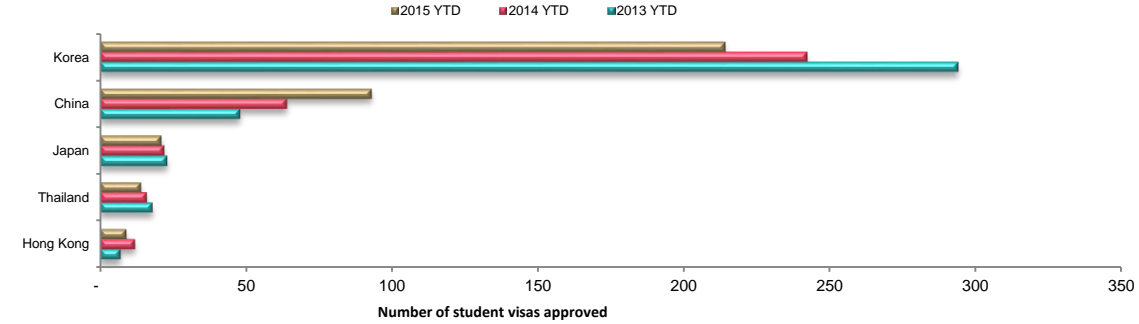
November RSV ↑ 11 122%
November FSV ↓ -8 -40%
November TSV ↑ 3 10%

YTD RSV ↑ 9 5%
YTD FSV → -6 -3%
YTD TSV → 3 1%

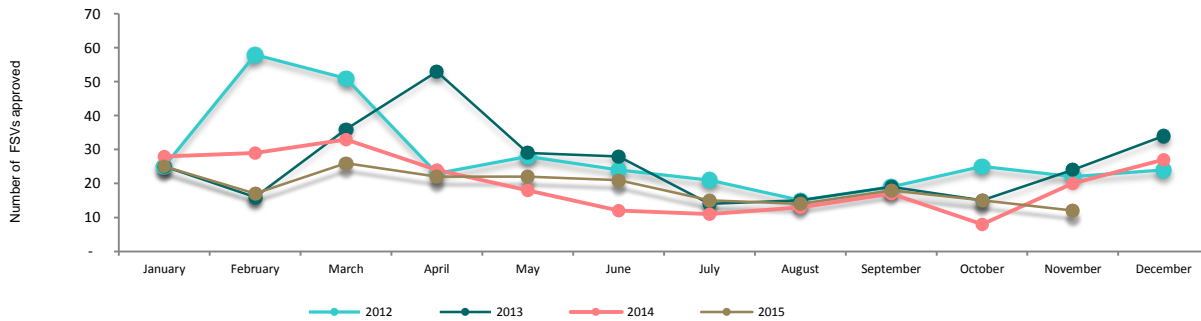
Intermediate Schools: Total student visas (TSV), 2012 - 2015



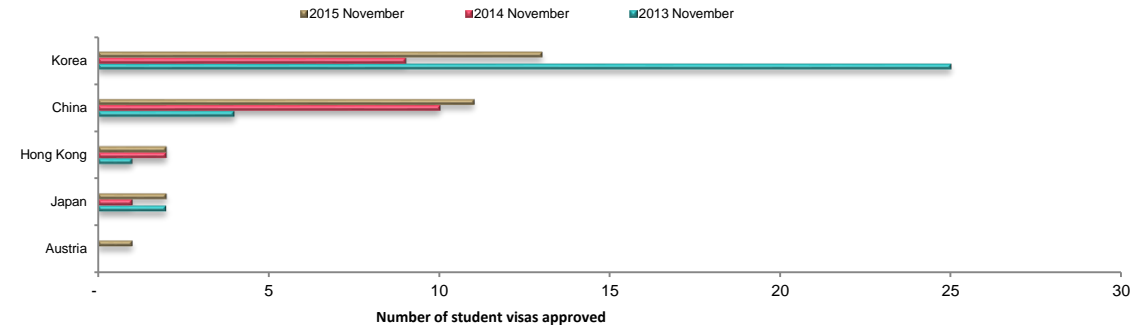
Intermediate Schools: Total student visas issued by country, YTD



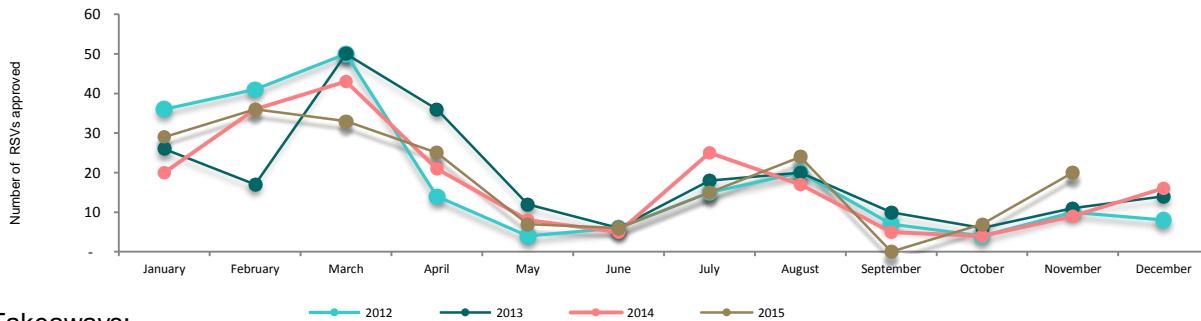
Intermediate Schools: First time student visas (FSV), 2012 - 2015



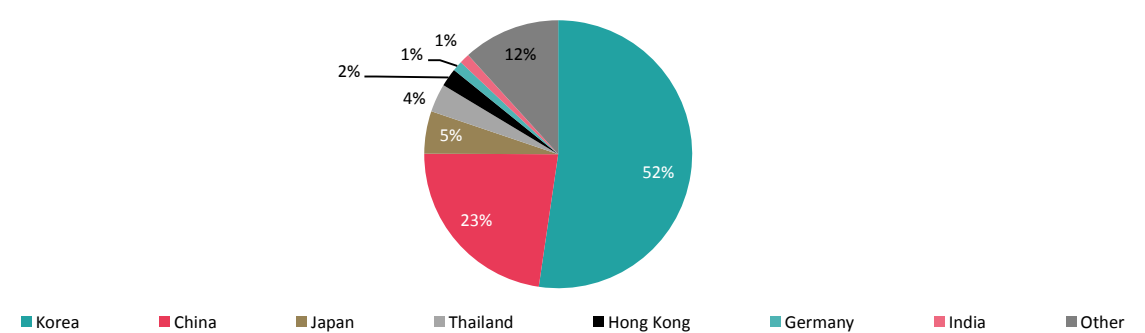
Intermediate Schools: Total student visas issued by country, November



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



YTD 2015 country breakdown of TSVs



Takeaways:

- YTD TSVs and FSVs are tracking flat, up 1% (3) and down 3% (-6).
- November experienced a decline in FSVs down 40% (-8) and TSVs up 10% (3).
- Korea has contributed 52% of all YTD TSVs.