

Student Visa Dashboard February 2015

Overall:

Market and sector overview



Introduction



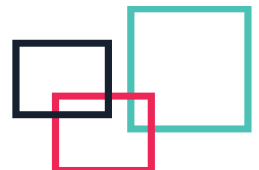
- *The following dashboard was developed by Education New Zealand and is based on Immigration New Zealand (INZ) data on issued student visas. This data source is the most immediate/instantaneous data available on the international education sector, as there is only a one month lag between student visas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



Caveats and notes



- Student visas vs. visitor visas:
 - Total student visas (TSV), first time student visas (FSV), and renewed student visas (RSV) only capture students who enter New Zealand with a student visa. These students are mostly those who are planning to study for more than three months.
 - Students who undertake a course 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.
- Work in progress:
 - ENZ is currently working on:
 - Understanding the true demand of student visas – ie: TSV applications vs. TSVs approved
 - Understanding the correlation between ENZ activity and policy changes on FSV trends
 - Understanding the impact of RSV on overall trends. Further discussion will be required on the ownership and responsibility for retaining these students
 - Further work is being undertaken to understand a relatively large number of “not recorded” entries for FSVs at the provider level
 - Further analysis is being undertaken on understanding the correlation between student visas and enrolments



How to read the dashboard

Name of the market/region

Overall indicator of the overall performance of the market

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

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

Key trends or interesting trends to consider

Overall:

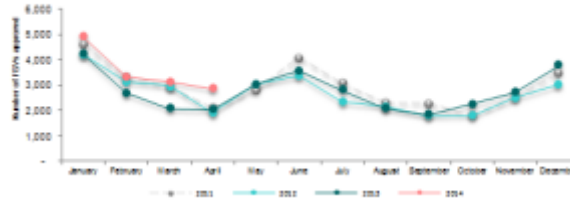
April RSV	April FSV	April TSV
- 45 -1%	833 41%	788 13%

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

Overall: Total student visas (TSV) 2011 - 2014



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



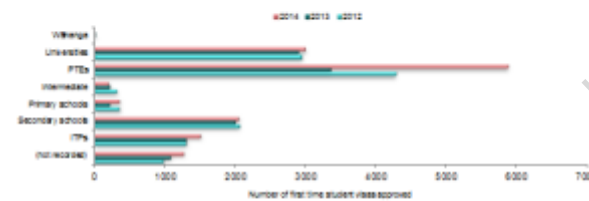
Overall: Renewed student visas (RSV) 2011 - 2014



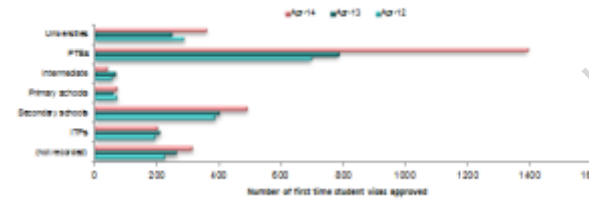
Takeaways:

- The 2014 academic year continues to trend positively – with 44% of all students having come for the year, there is an additional 6,252 TSVs when compared to the same period in 2013.
- RSVs for April have slowed down – this appears to be driven by the China market

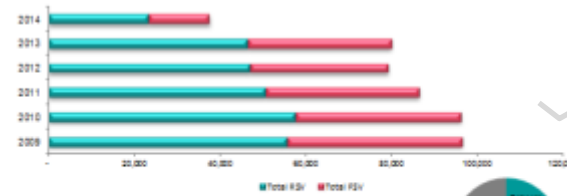
Overall: First time student visas issued by sector, YTD



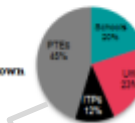
Overall: First time student visas issued by sector, April



Overall - Cumulative total for RSV vs. FSV 2009 - 2014



YTD Sector breakdown of FSVs



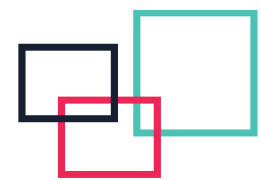
This pie graph represents the sector distribution of FSVs YTD.

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

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

Shows the Monthly sector performance of actual FSVs numbers.

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



Key trends

Year-to-date (YTD)

- Continuing a strong 2014, the 2015 academic year has seen strong growth in total student visas (TSVs) up 9% (1,694) and first time student visas (FSVs) up 21% (1,752). Returning student visas (RSVs) have declined by 1% (58).
- The YTD growth was driven by India, China, Thailand, Colombia and the USA.
- The ITP, PTE and university sectors have experienced the strongest YTD growth up 64% (683), 23% (654), and 12% (267).

February:

- February was another strong month for TSVs up 9% (872) and FSVs up 22% (736).
- The growth was driven by India, China, Brazil, Philippines, and Colombia.
- All sectors, with the exception of the university sector, experienced growth.

Increases

TSVs for February	Change	% change
India	515	36%
China	373	12%
Brazil	86	90%
Philippines	65	27%
Colombia	41	53%

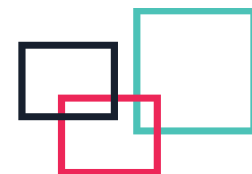
FSVs for February	Change	% change
India	371	37%
China	123	32%
Philippines	89	68%
Brazil	63	93%
Colombia	43	90%

Sector FSVs for February	Change	% change
ITPs	344	80%
PTEs	237	17%
Secondary school	90	27%
Primary school	6	6%
Intermediate	2	3%
Universities	-30	-4%

Decreases

France	-25	-37%
Iran	-32	-56%
Malaysia	-64	-23%
Korea	-115	-12%
Japan	-121	-22%

Solomon Islands	-11	-48%
Iran	-11	-73%
Korea	-12	-5%
Canada	-12	-39%
Japan	-65	-27%



Overall performance

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

FSV = First time student visas

TSV = Total student visas

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Month on month performance:

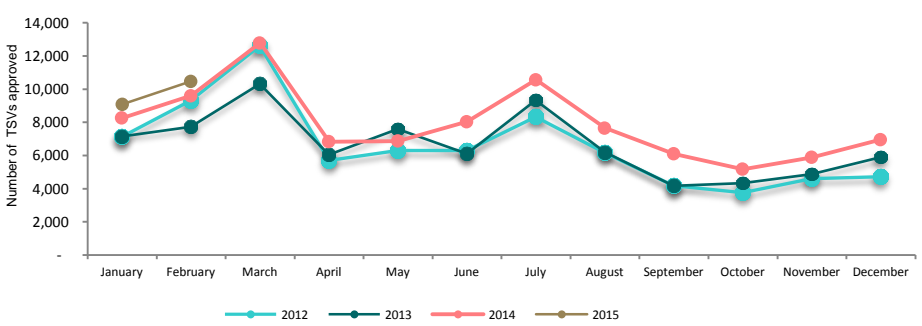
2014		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Full year	2015		Jan	Feb
RSV	Yearly %	6%	13%	21%	8%	7%	6%	13%	9%	5%	4%	4%	4%	100%	RSV	Yearly %	6%	13%
	Result (2014 vs. 2013)	↑ 16%	↑ 24%	↑ 17%	↓ -1%	↓ -39%	↑ 32%	↓ -7%	↑ 11%	↑ 19%	↑ 7%	↑ 10%	↑ 9%	↑ 6%		FSV	2015 vs. 2014	↓ -6%
FSV	Yearly %	13%	10%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



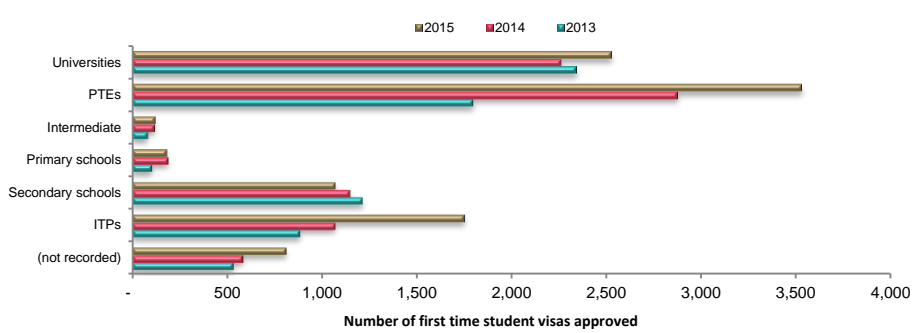
February RSV		February FSV		February TSV	
	136	2%		736	22%
	872	9%			

YTD RSV		YTD FSV		YTD TSV	
	-58	-1%		1,752	21%
				1,694	9%

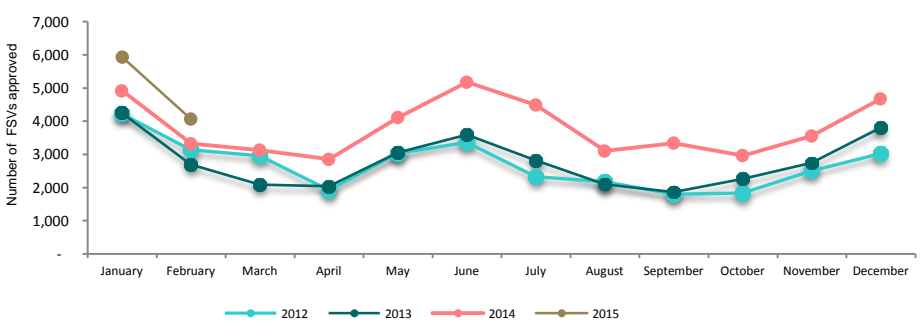
Overall: Total student visas (TSV) 2012 - 2015



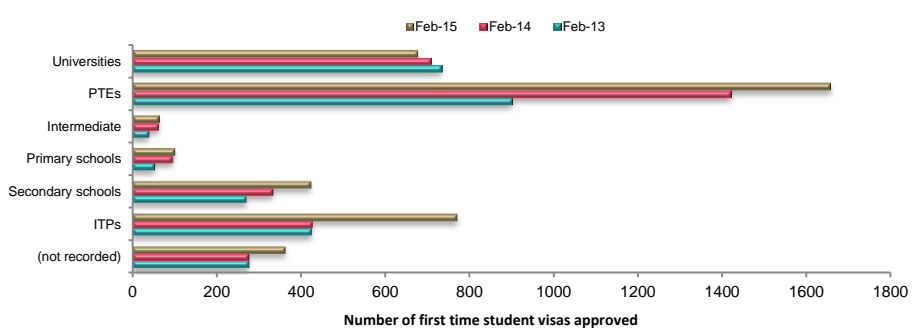
Overall: First time student visas issued by sector, YTD



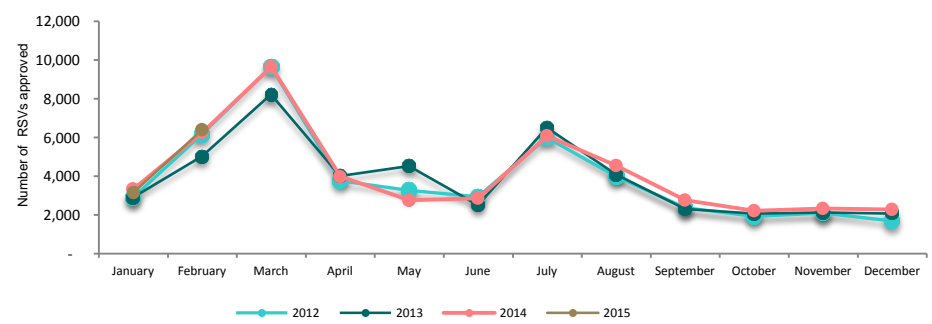
Overall: First time student visas (FSV) 2012 - 2015



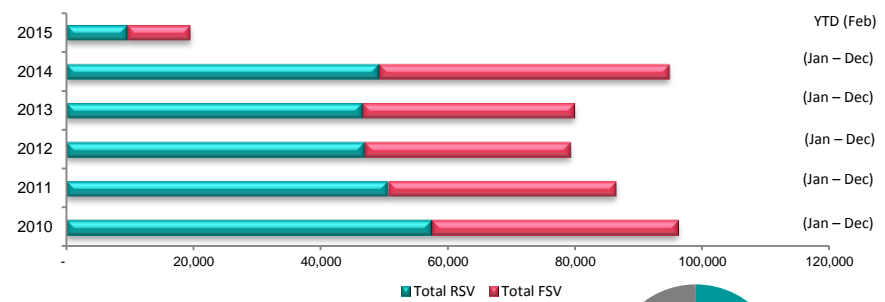
Overall: First time student visas issued by sector, February



Overall: Renewed student visas (RSV) 2012 - 2015



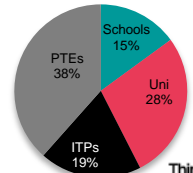
Overall: Cumulative total for RSV vs. FSV 2010 - 2015









Takeaways:

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

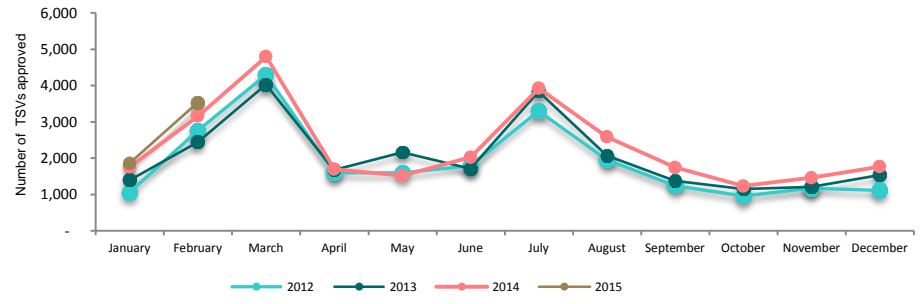
YTD 2015 sector breakdown of FSVs



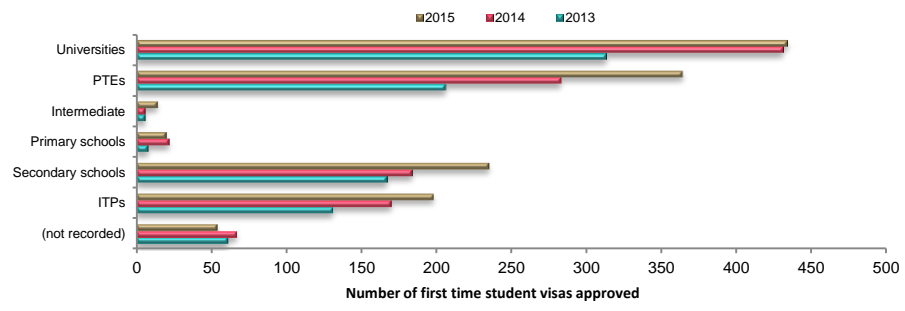
February RSV		February FSV		February TSV	
 250	9%	 123	32%	 373	12%

YTD RSV		YTD FSV		YTD TSV	
 318	8%	 156	13%	 474	10%

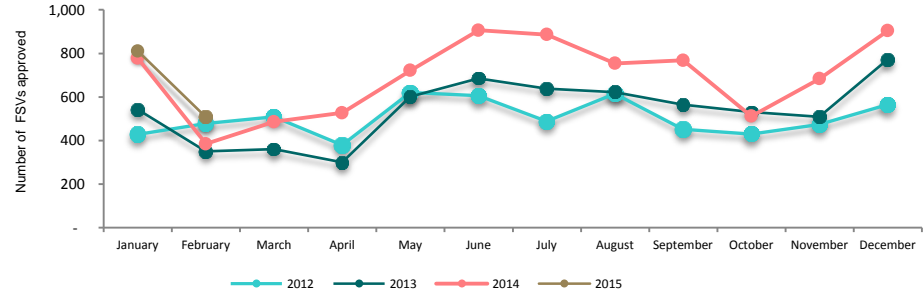
China: Total student visas (TSV) 2012 - 2015



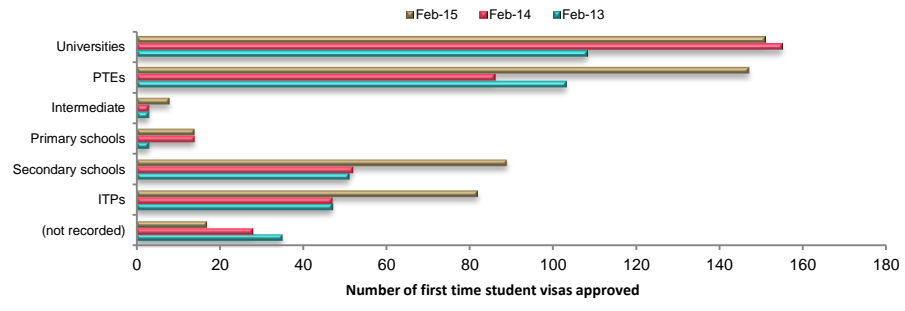
China: First time student visas issued by sector, YTD



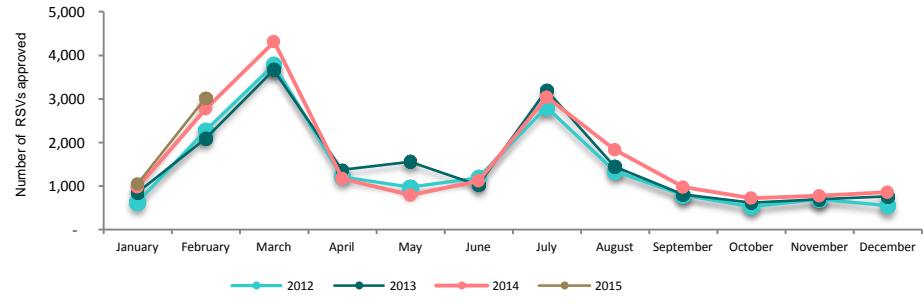
China: First time student visas (FSV) 2012 - 2015



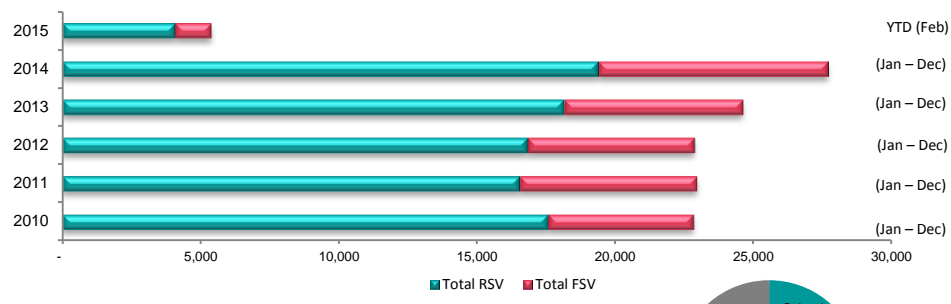
China: First time student visas issued by sector, February



China: Renewed student visas (RSV) 2012 - 2015



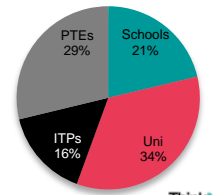
China: Cumulative total for RSV vs. FSV 2010 - 2015









Takeaways:

- China experienced a steady start to the 2015.
- The PTE, secondary school, and ITP sectors have experienced strong growth YTD up 29%, 28%, and 16%.

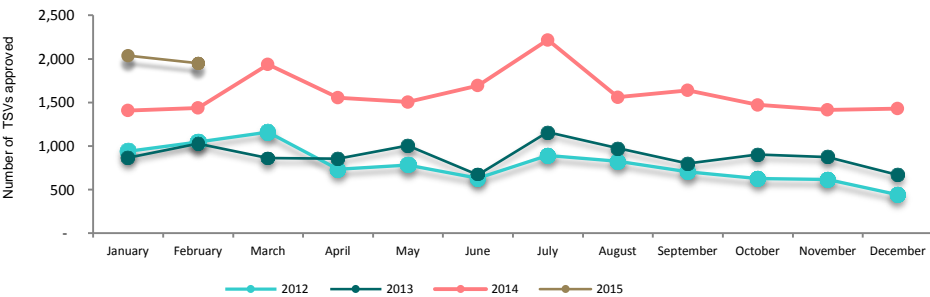
YTD 2015 sector breakdown of FSVs



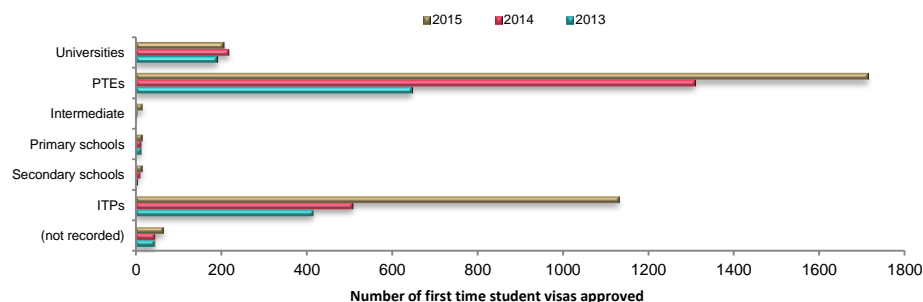
February RSV		February FSV		February TSV	
	144	33%		371	37%
	515	36%			

YTD RSV		YTD FSV		YTD TSV	
	89	12%		1,055	50%
	1,144	40%			

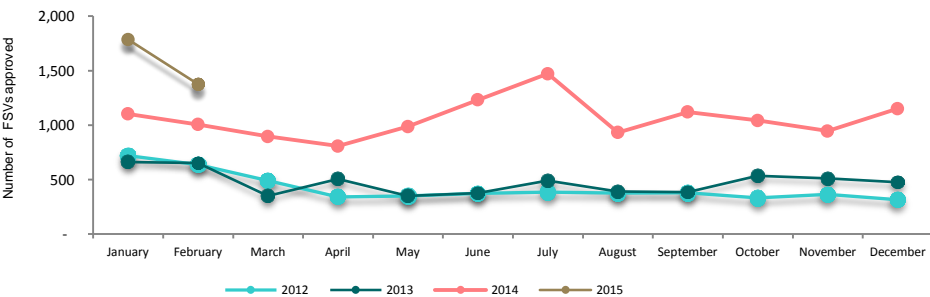
India: Total student visas (TSV) 2012 - 2015



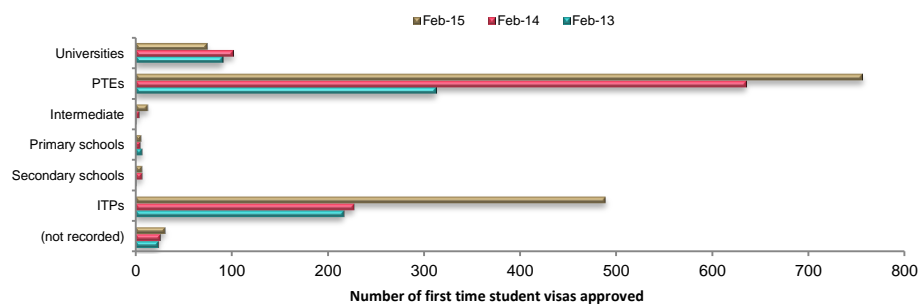
India: First time student visas issued by sector, YTD



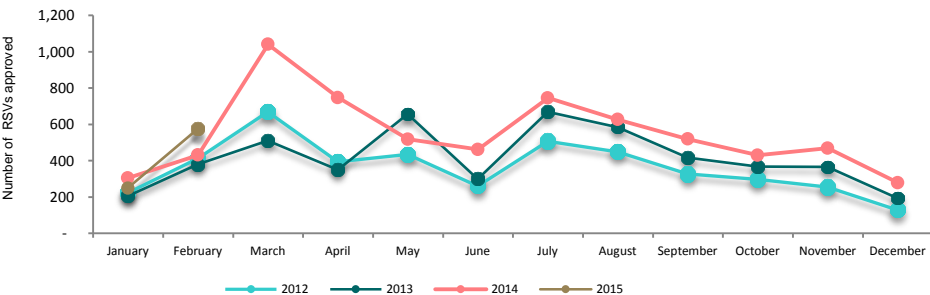
India: First time student visas (FSV) 2012 - 2015



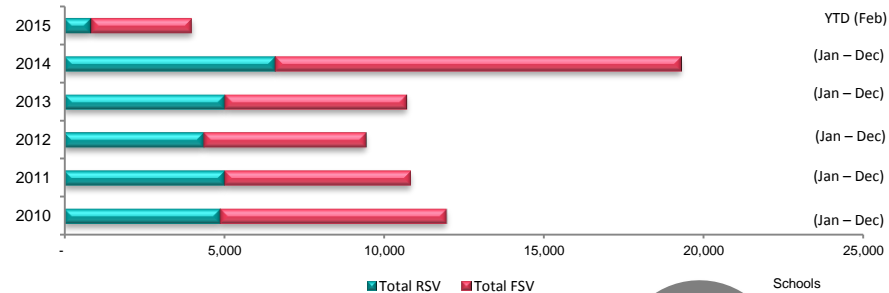
India: First time student visas issued by sector, February



India: Renewed student visas (RSV) 2012 - 2015



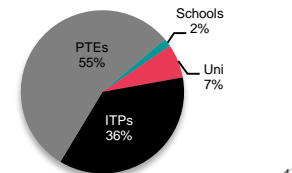
India: Cumulative total for RSV vs. FSV 2010 - 2015









Takeaways:

- Following a strong finish to 2014, India continues to see growth.
- The PTE and ITP sectors experienced the highest growth up, 31% and 122% YTD.

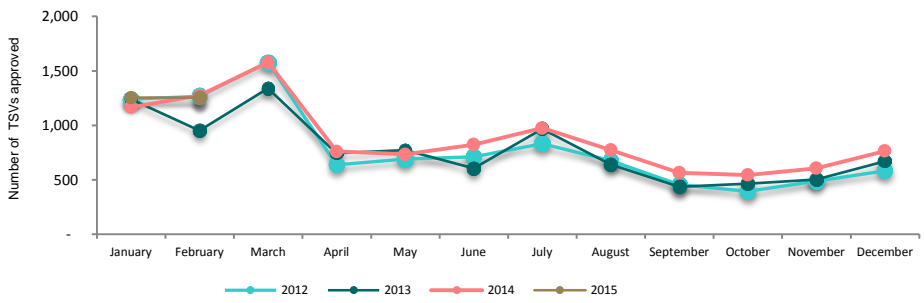
YTD 2015 sector breakdown of FSVs



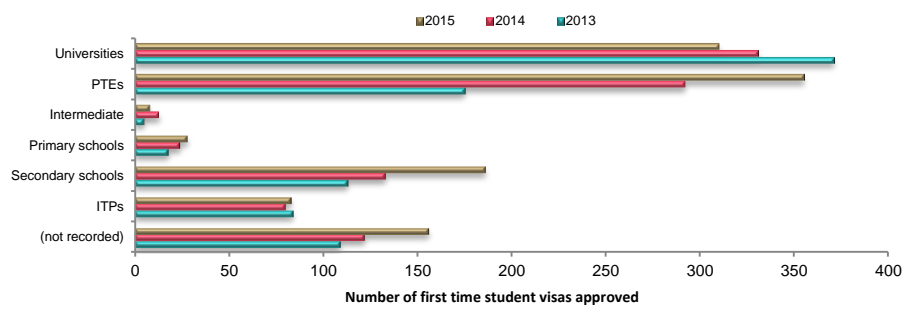
February RSV		February FSV		February TSV	
	-120		101		-19
	-15%		22%		-1%

YTD RSV		YTD FSV		YTD TSV	
	-63		131		68
	-4%		13%		3%

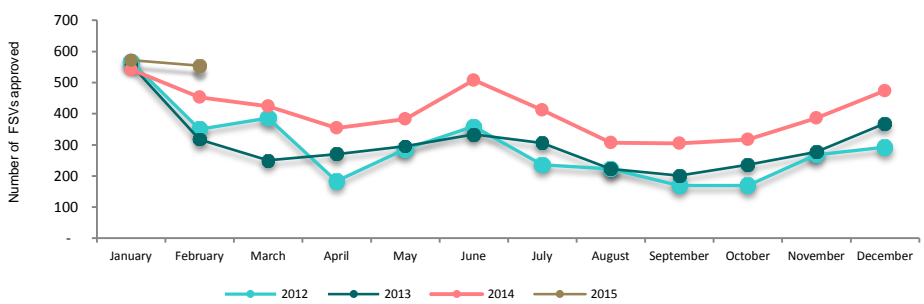
ASEAN: Total student visas (TSV) 2012 - 2015



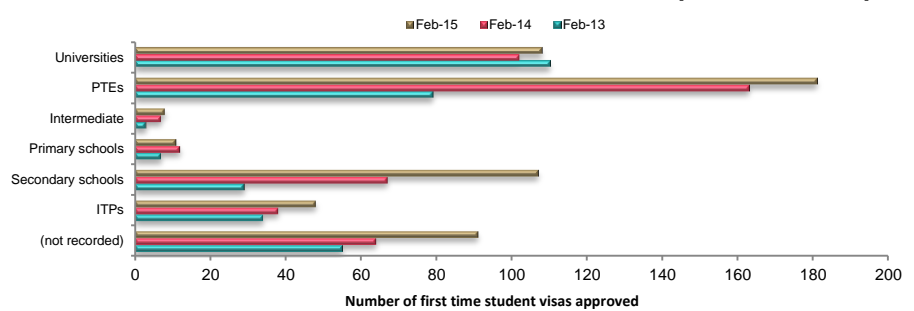
ASEAN: First time student visas issued by sector, YTD



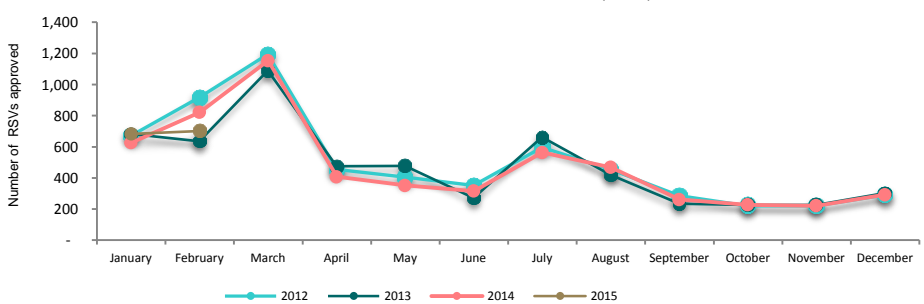
ASEAN: First time student visas (FSV) 2012 - 2015



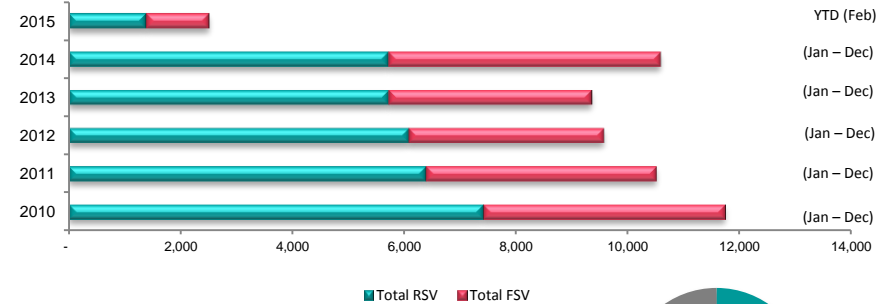
ASEAN: First time student visas issued by sector, February



ASEAN: Renewed student visas (RSV) 2012 - 2015



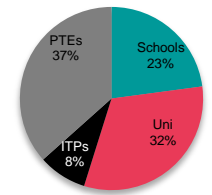
ASEAN: Cumulative total for RSV vs. FSV 2010 - 2015









Takeaways:

- The ASEAN market experienced steady growth in 2015.
- RSVs for February declined by 15% (-120) which has slowed the TSV position for February.

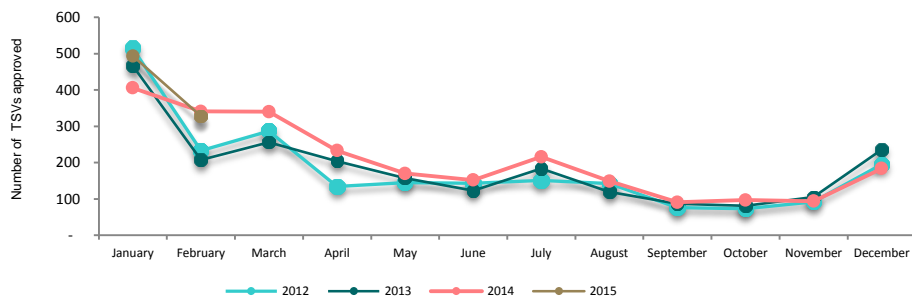
YTD 2015 sector breakdown of FSVs



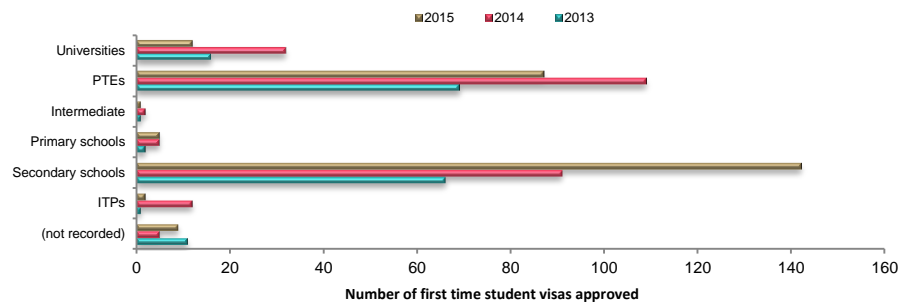
February RSV		February FSV		February TSV	
 -12	-7%	 -1	-1%	 -13	-4%

YTD RSV		YTD FSV		YTD TSV	
 73	15%	 2	1%	 75	10%

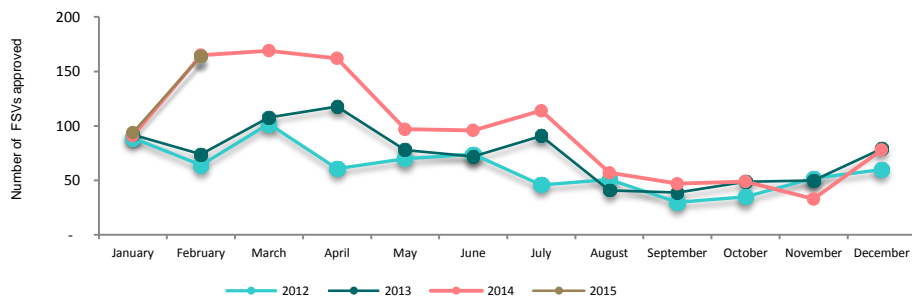
Thailand: Total student visas (TSV) 2012 - 2015



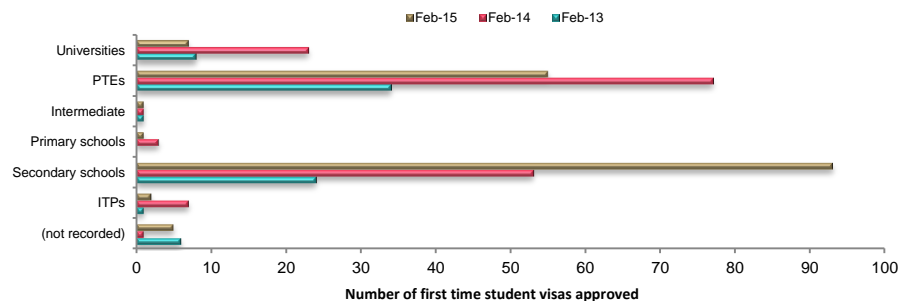
Thailand: First time student visas issued by sector, YTD



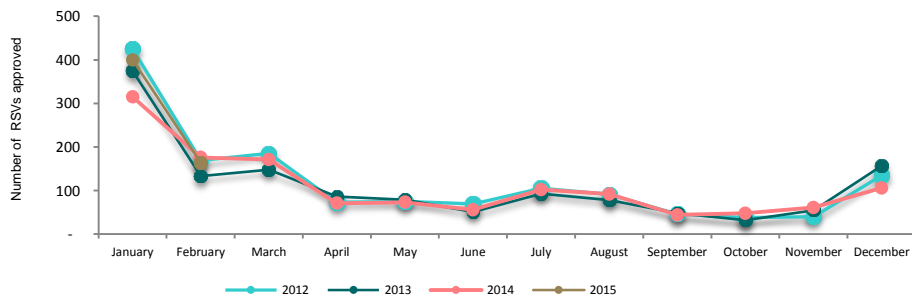
Thailand: First time student visas (FSV) 2012 - 2015



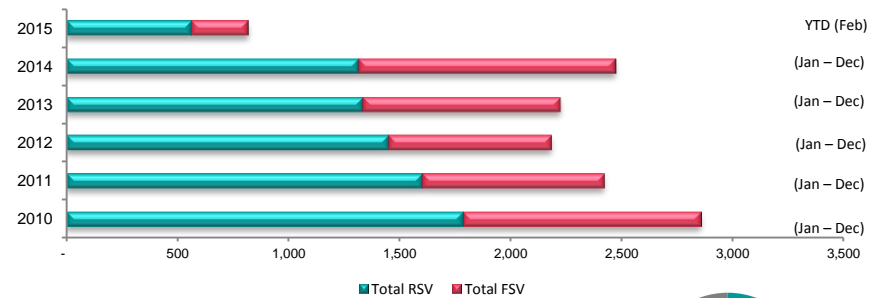
Thailand: First time student visas issued by sector, February



Thailand: Renewed student visas (RSV) 2012 - 2015



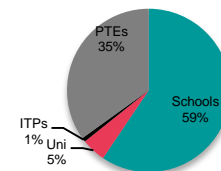
Thailand: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market experienced a strong start to the year.
- February sees a flat result across all student visas.
- FSVs for the secondary school sector grew by 75%.

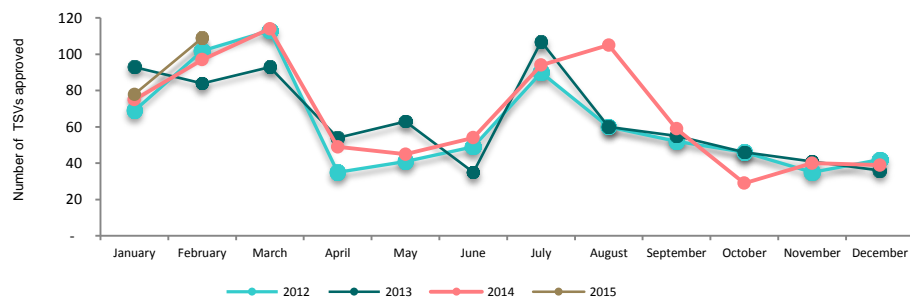
YTD 2015 sector breakdown of FSVs



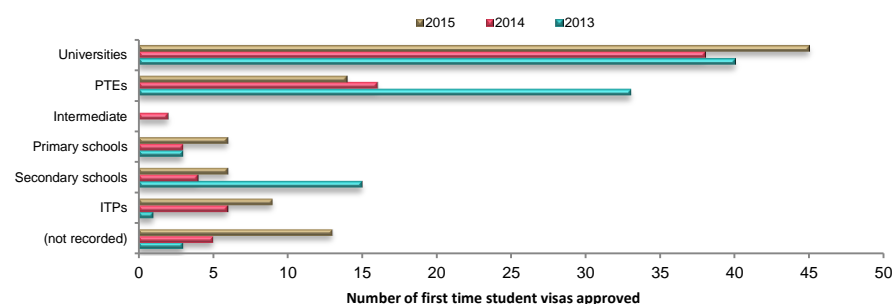
February RSV		February FSV		February TSV	
↓	-5	↑	17	↑	12
	-7%		65%		12%

YTD RSV		YTD FSV		YTD TSV	
↓	-4	↑	19	↑	15
	-4%		26%		9%

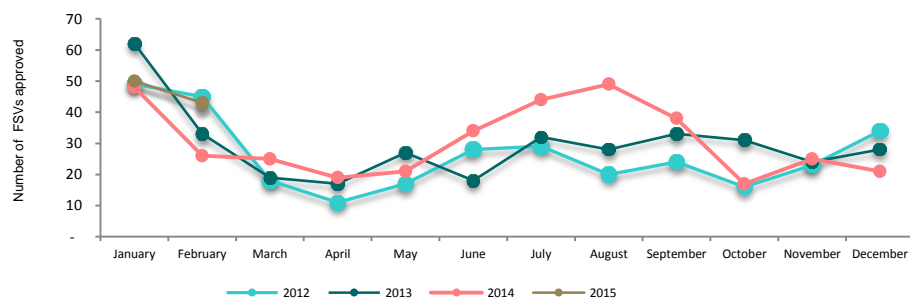
Indonesia: Total student visas (TSV) 2012 - 2015



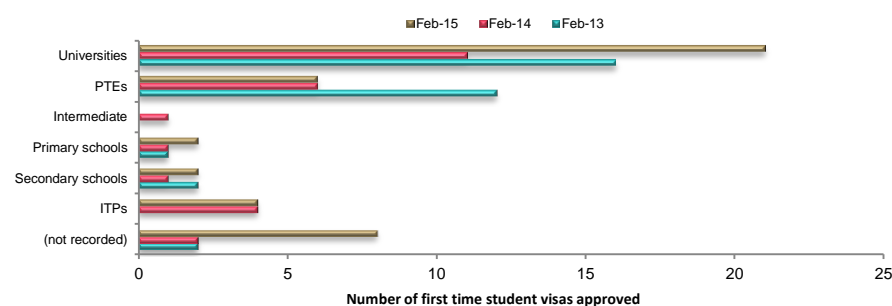
Indonesia: First time student visas issued by sector, YTD



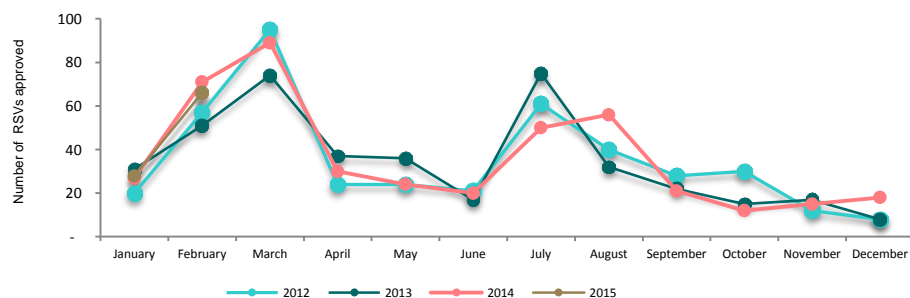
Indonesia: First time student visas (FSV) 2012 - 2015



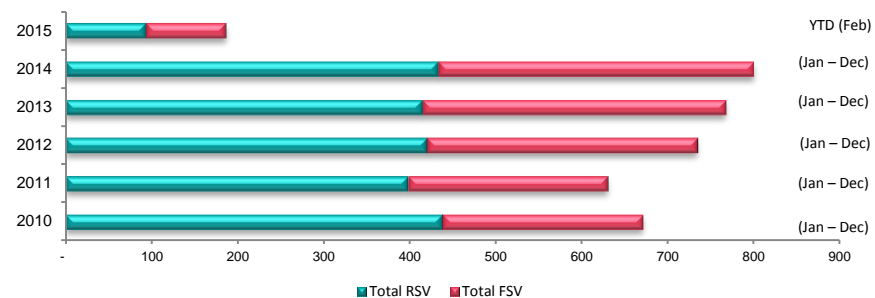
Indonesia: First time student visas issued by sector, February



Indonesia: Renewed student visas (RSV) 2012 - 2015



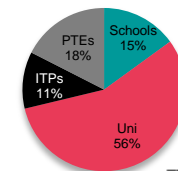
Indonesia: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- After a relatively inconsistent 2014, this market has begun the 2015 year with a similar trend.
- February saw strong increase in university approvals up 91% (10).

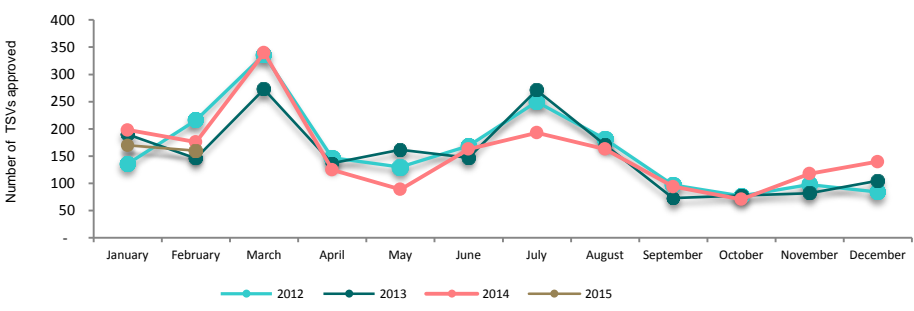
YTD 2015 sector
breakdown of FSVs



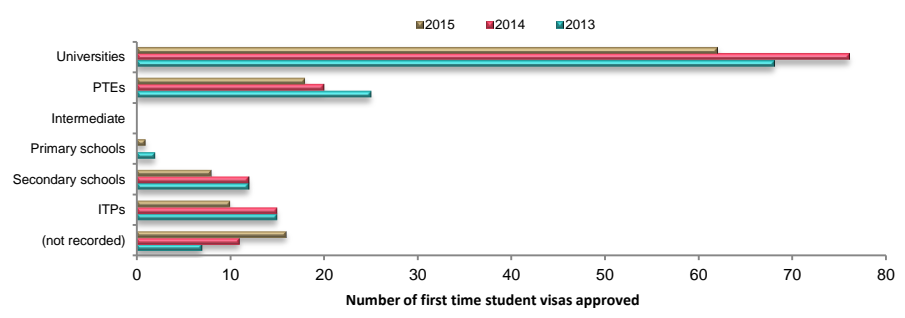
February RSV		February FSV		February TSV	
↓ -16	-11%	→ 0	0%	↓ -16	-9%

YTD RSV		YTD FSV		YTD TSV	
↓ -25	-10%	↓ -19	-14%	↓ -44	-12%

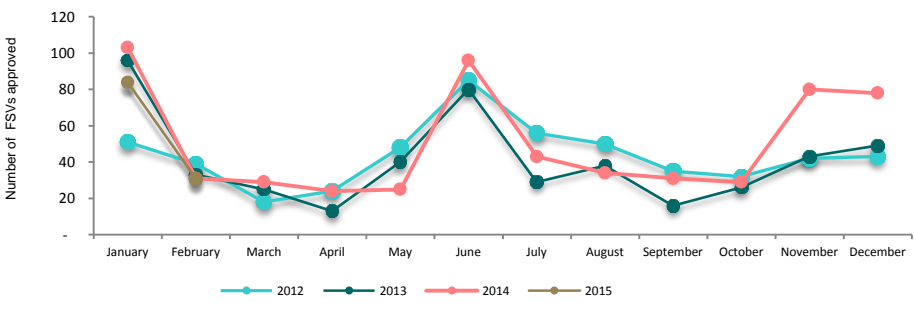
Viet Nam: Total student visas (TSV) 2012 - 2015



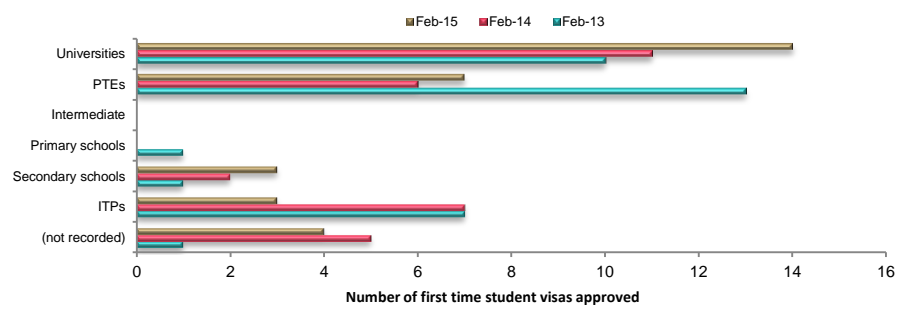
Viet Nam: First time student visas issued by sector, YTD



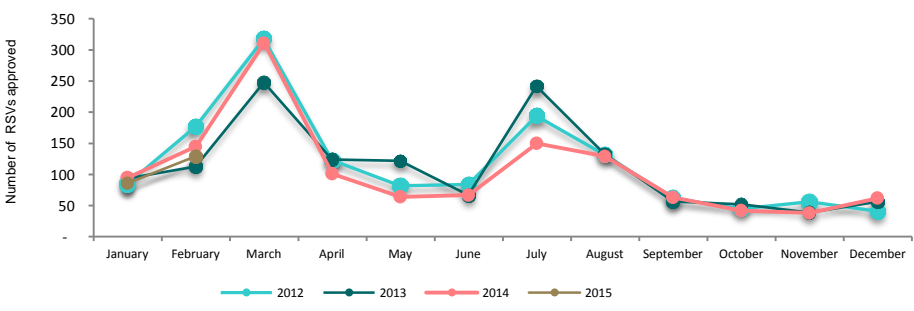
Viet Nam: First time student visas (FSV) 2012 - 2015



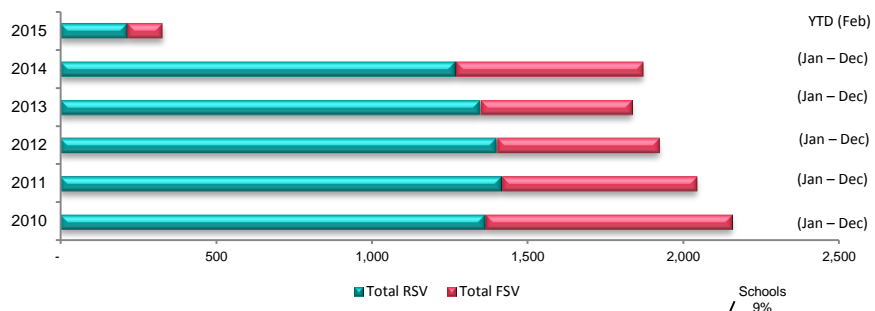
Viet Nam: First time student visas issued by sector, February



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



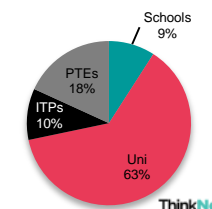
Viet Nam: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- The final quarter of 2014, specifically November and December, saw a strong finish to the year.
- However the start of 2015 has seen a relatively significant decline in student visa approvals.

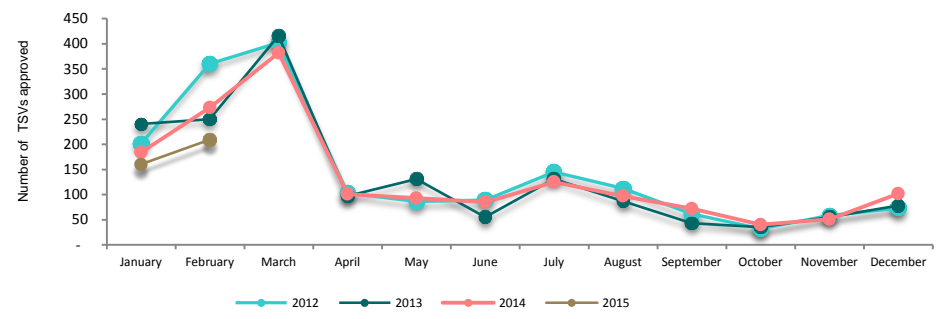
YTD 2015 sector breakdown of FSVs



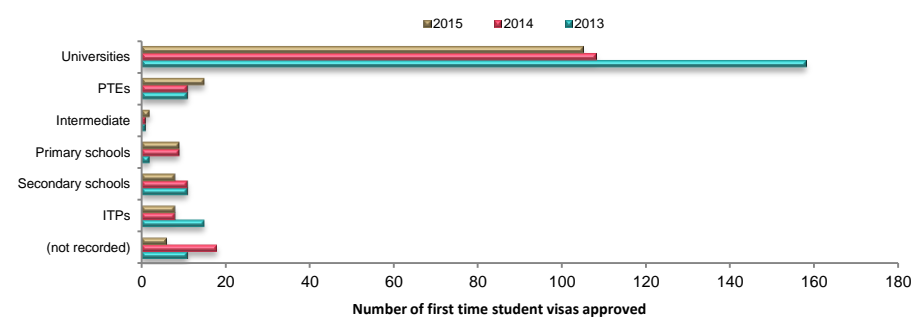
February RSV		February FSV		February TSV	
↓	-66	↑	2	↓	-64
	-31%		3%		-23%

YTD RSV		YTD FSV		YTD TSV	
↓	-75	↓	-13	↓	-88
	-26%		-8%		-19%

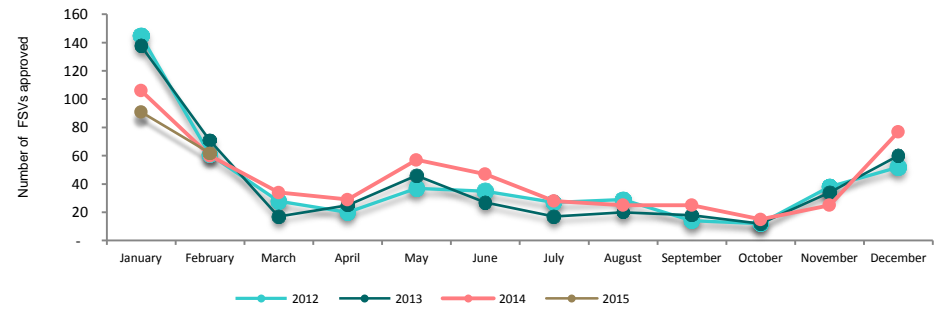
Malaysia: Total student visas (TSV) 2012 - 2015



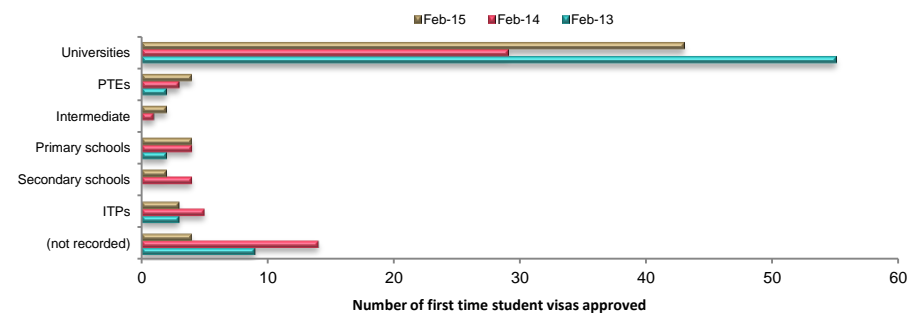
Malaysia: First time student visas issued by sector, YTD



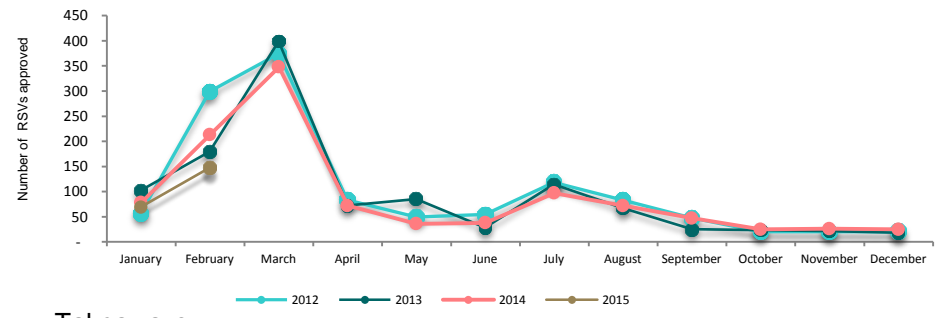
Malaysia: First time student visas (FSV) 2012 - 2015



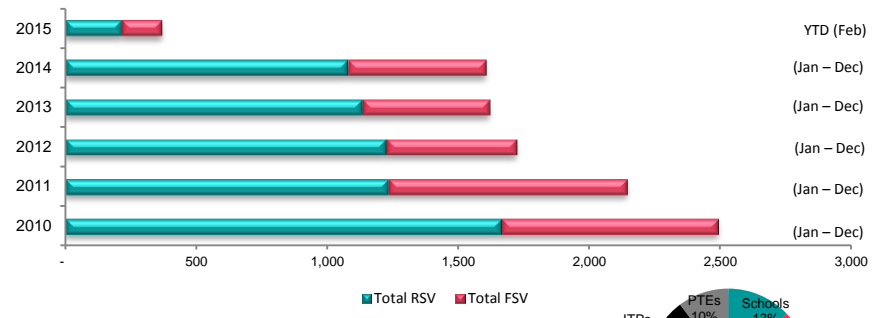
Malaysia: First time student visas issued by sector, February



Malaysia: Renewed student visas (RSV) 2012 - 2015



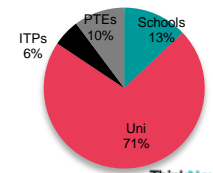
Malaysia: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market has tracked flat throughout 2014 and has experienced a relatively significant decline in YTD down 19% TSVs.
- February saw growth in the university sector up 48% (14 FSVs).

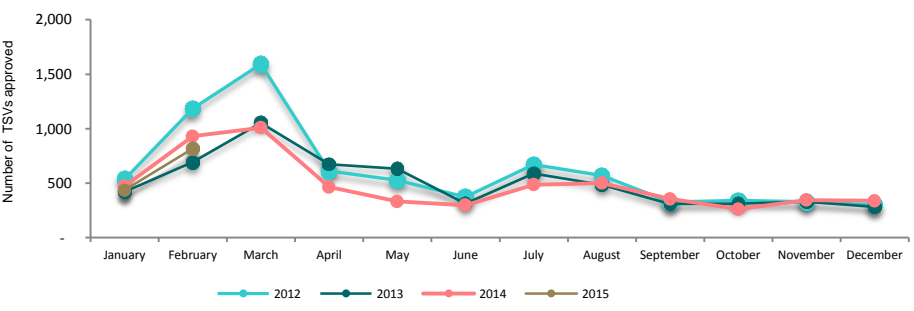
YTD 2015 sector breakdown of FSVs



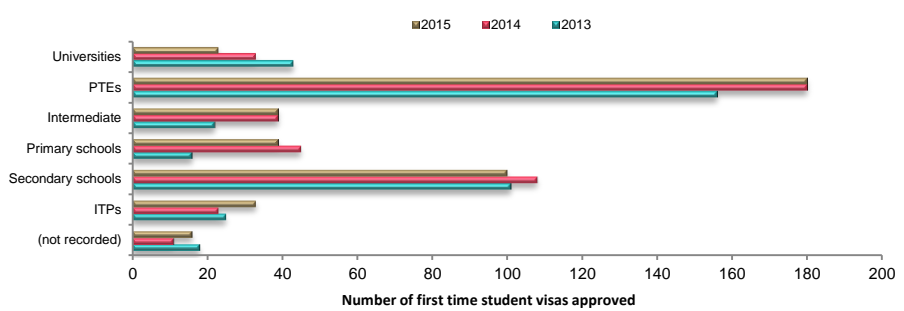
February RSV		February FSV		February TSV	
↓ -103	-15%	↓ -12	-5%	↓ -115	-12%

YTD RSV		YTD FSV		YTD TSV	
↓ -142	-15%	↓ -9	-2%	↓ -151	-11%

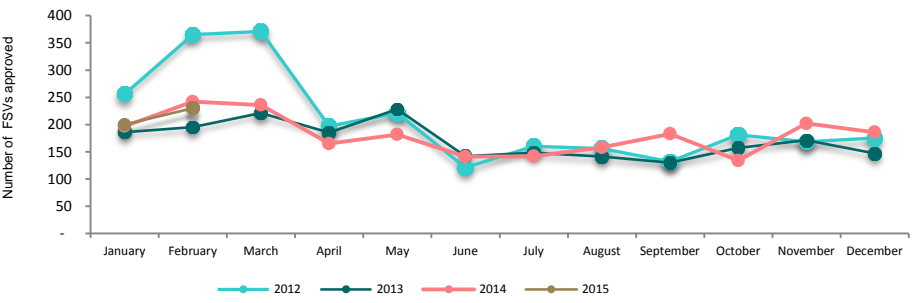
Korea: Total student visas (TSV) 2012 - 2015



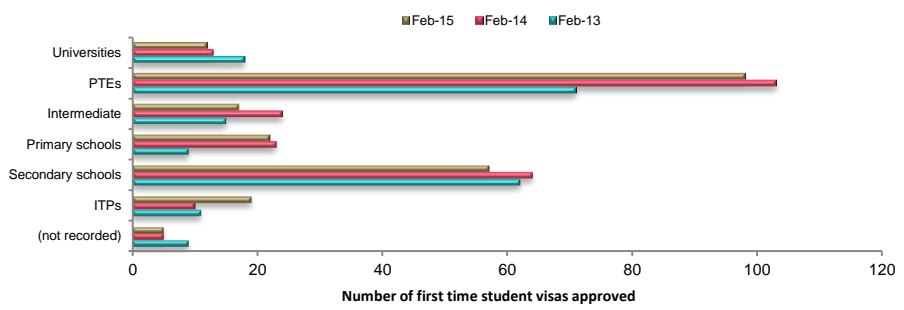
Korea: First time student visas issued by sector, YTD



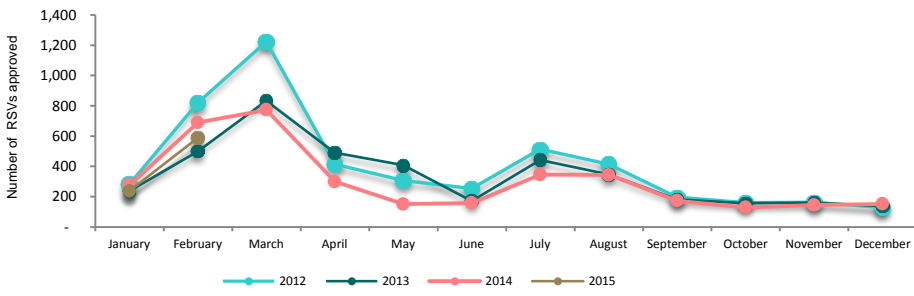
Korea: First time student visas (FSV) 2012 - 2015



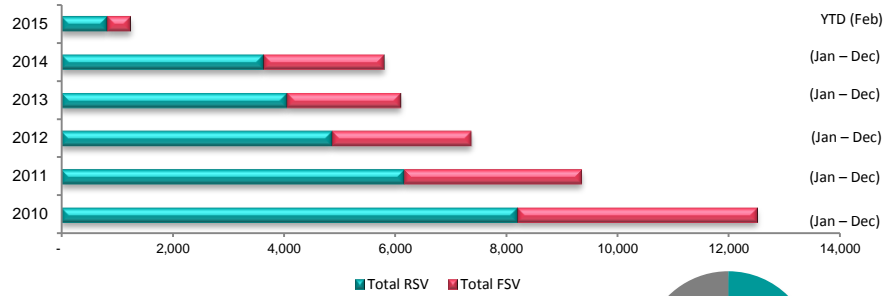
Korea: First time student visas issued by sector, February



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



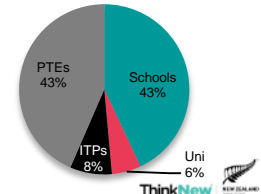
Korea: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market continues to see negative results, down 11% (151 TSVs) YTD.
- All sectors experienced a decline or flat result YTD, with the exception of the ITP sector which was up 43% (10).

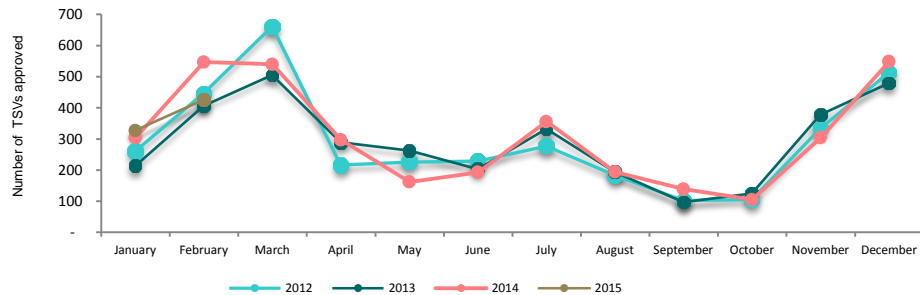
YTD 2015 sector breakdown of FSVs



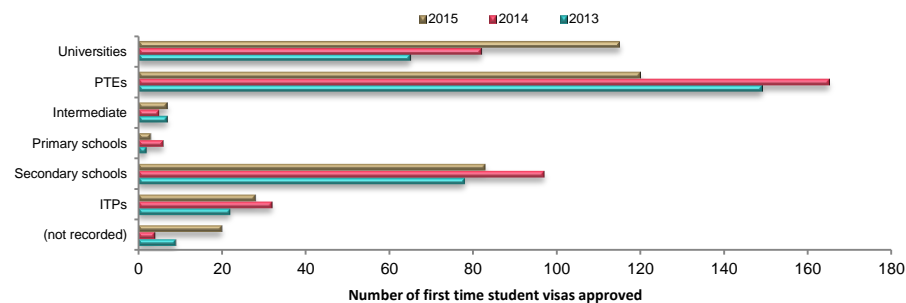
February RSV		February FSV		February TSV	
↓ -56	-18%	↓ -65	-27%	↓ -121	-22%

YTD RSV		YTD FSV		YTD TSV	
↓ -83	-18%	↓ -15	-4%	↓ -98	-12%

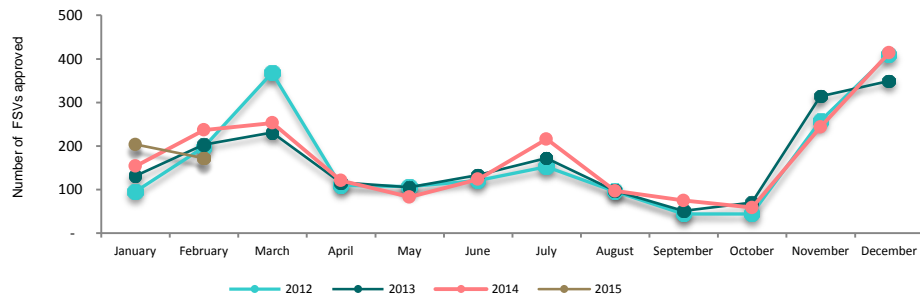
Japan: Total student visas (TSV) 2012 - 2015



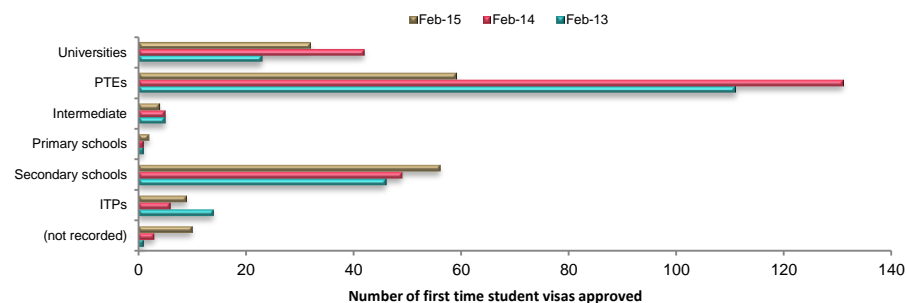
Japan: First time student visas issued by sector, YTD



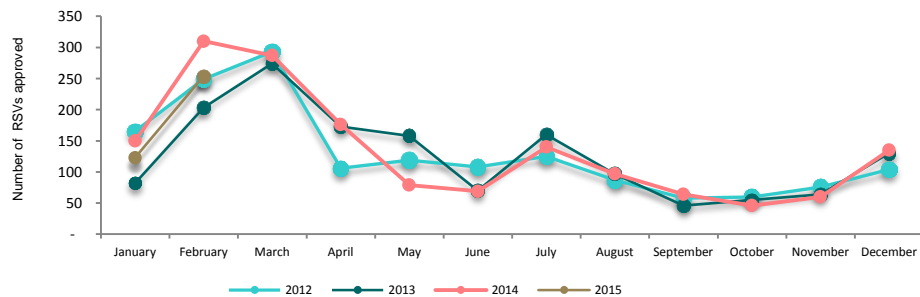
Japan: First time student visas (FSV) 2012 - 2015



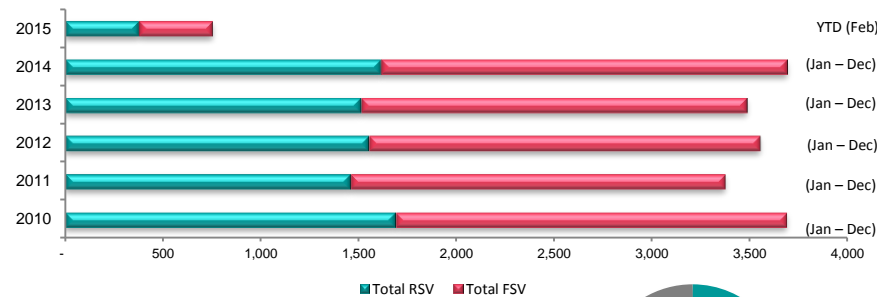
Japan: First time student visas issued by sector, February



Japan: Renewed student visas (RSV) 2012 - 2015



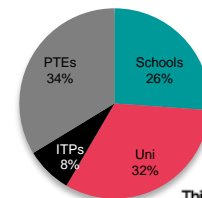
Japan: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:




- Despite a positive January, February TSVs are down 22% (-121). This has also affected the YTD position which is down 12% (98 TSVs).




YTD 2015 sector breakdown of FSVs



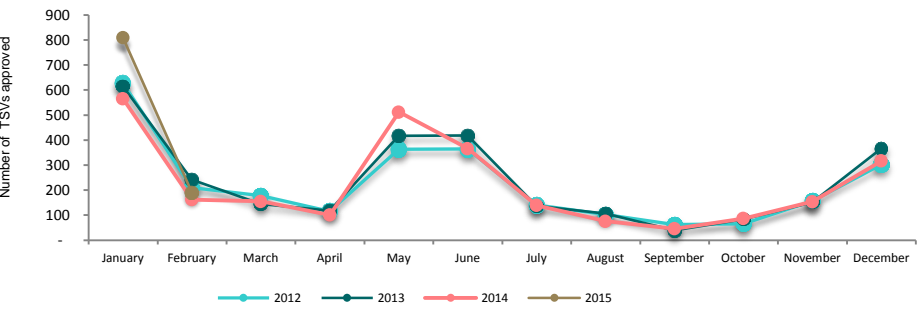
United States of America:

YTD (January to February)

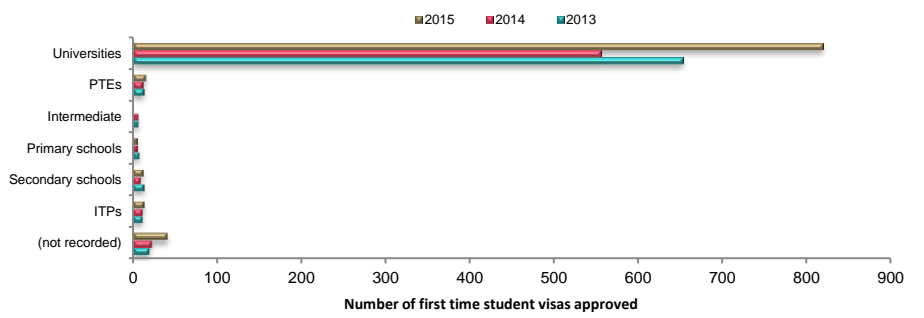
February RSV		February FSV		February TSV	
	3	5%		27	25%
	30	19%			

YTD RSV		YTD FSV		YTD TSV	
	-9	-8%		284	46%
	275	38%			

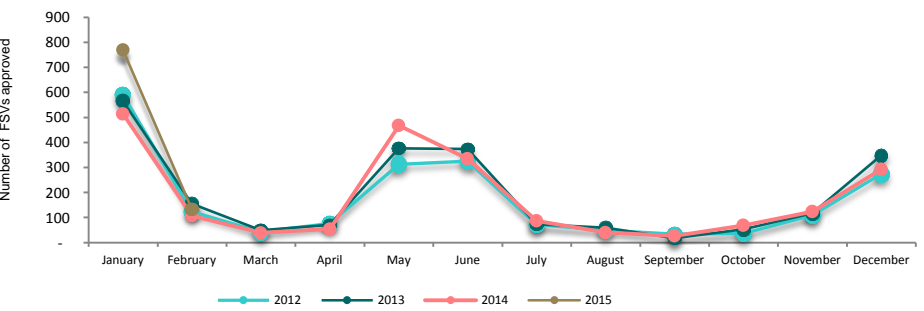
United States of America: Total student visas (TSV) 2012 - 2015



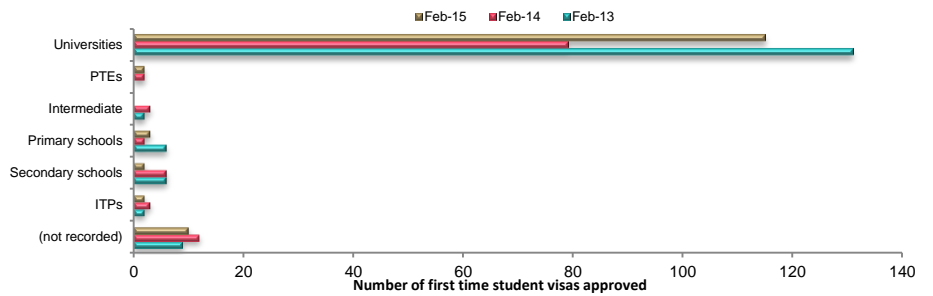
United States of America: First time student visas issued by sector, YTD



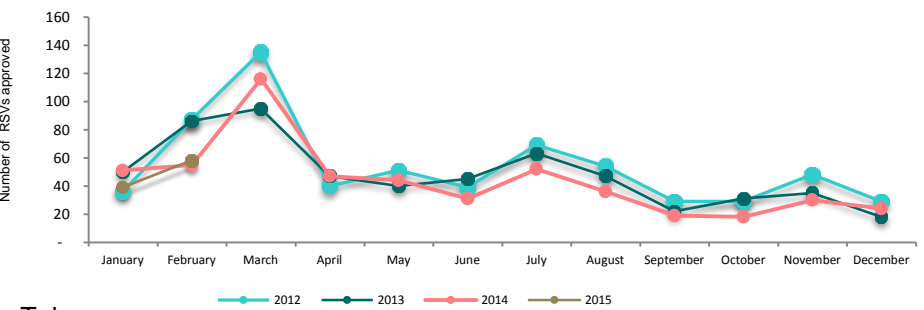
United States of America: First time student visas (FSV) 2012 - 2015



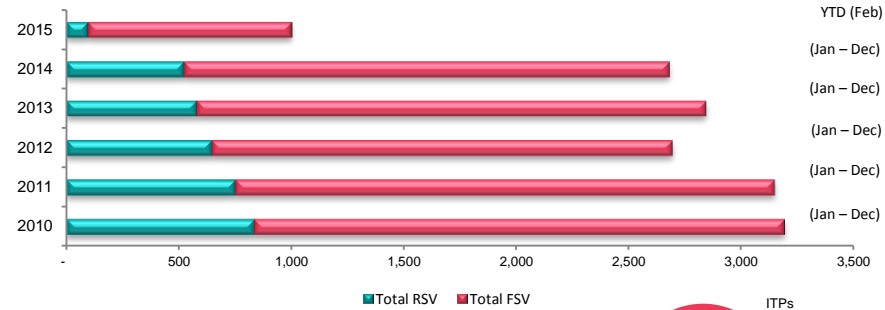
United States of America: First time student visas issued by sector, February



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



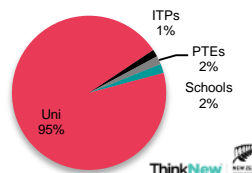
United States of America: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market has experienced a significant increase in FSVs, up 46% (284) YTD.
- 95% of the approved FSVs for this market are university students.




YTD 2015 sector breakdown of FSVs



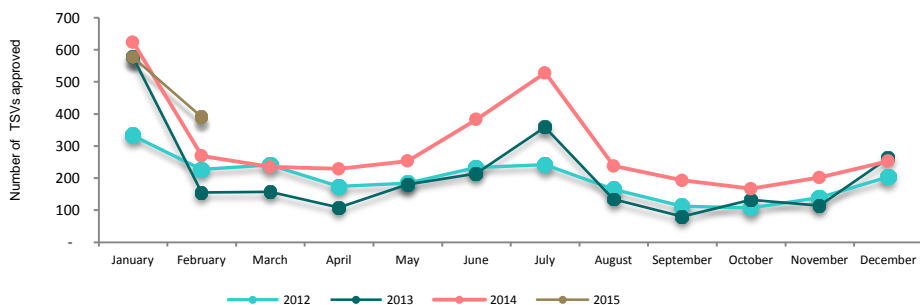
Latin America:

YTD (January to February)

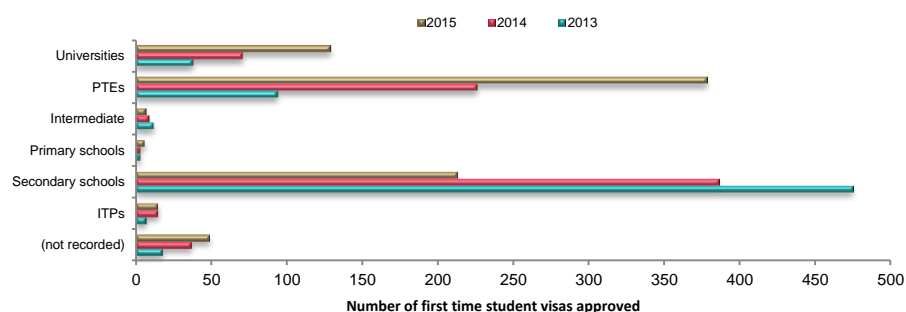
February RSV		February FSV		February TSV	
	21	24%		101	55%
	122	45%			

YTD RSV		YTD FSV		YTD TSV	
	25	17%		50	7%
	75	8%			

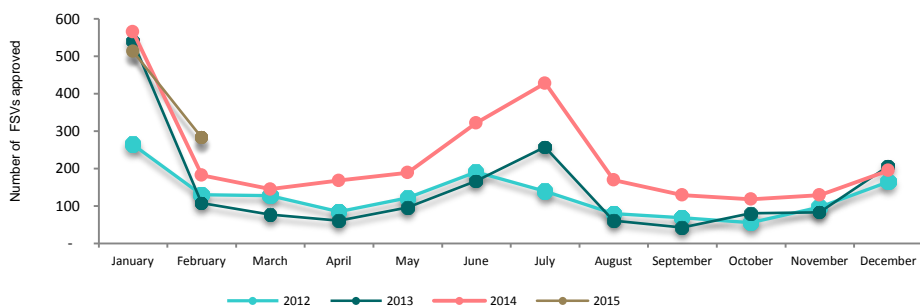
Latin America: Total student visas (TSV) 2012 - 2015



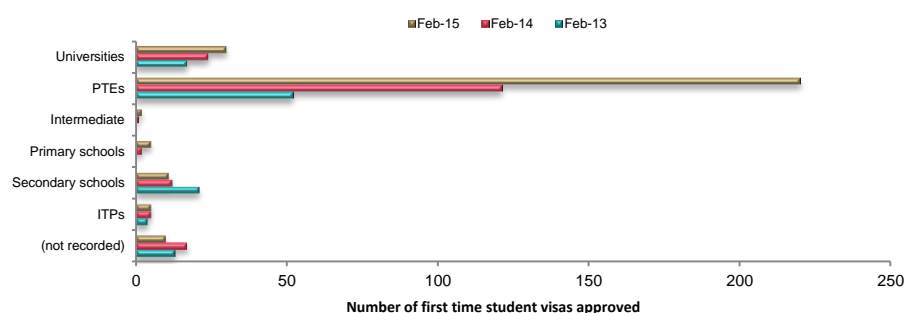
Latin America: First time student visas issued by sector, YTD



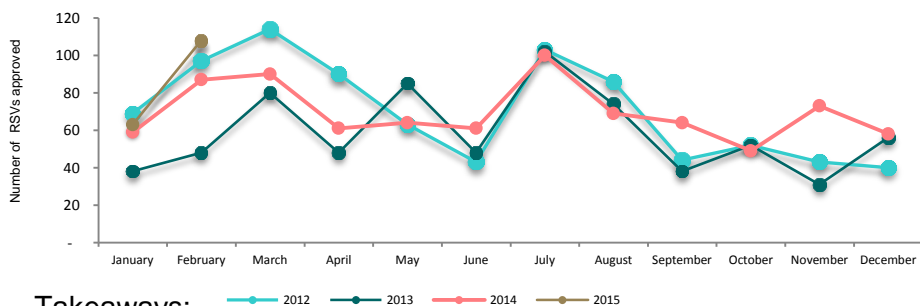
Latin America: First time student visas (FSV) 2012 - 2015



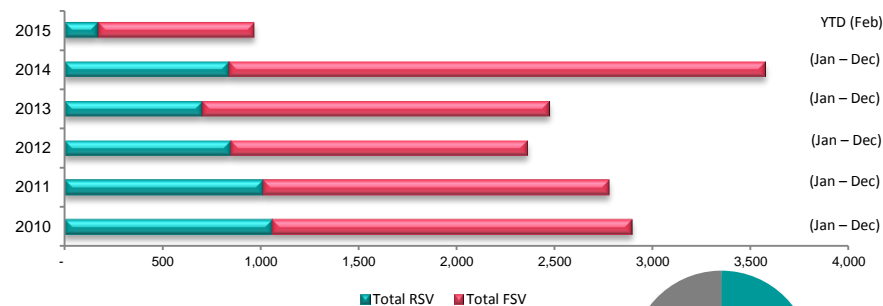
Latin America: First time student visas issued by sector, February



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



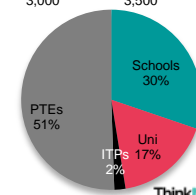
Latin America: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market experienced significant growth in 2014, but has had a slow start to 2015.
- The university and PTE sectors have experienced growth.
- The sharp decline in school FSVs is due to a reduction in Chilean scholarship students (Penguins).

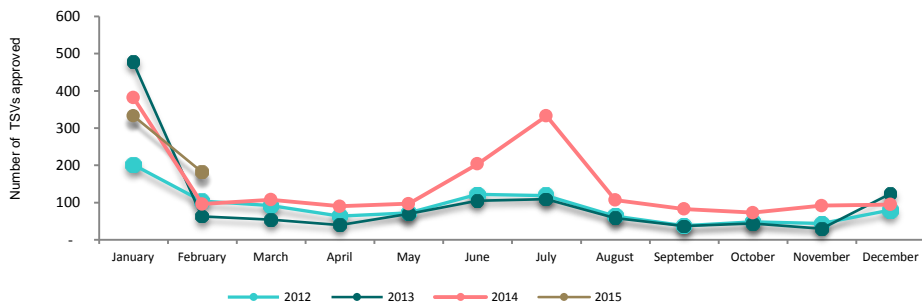
YTD 2015 sector breakdown of FSVs



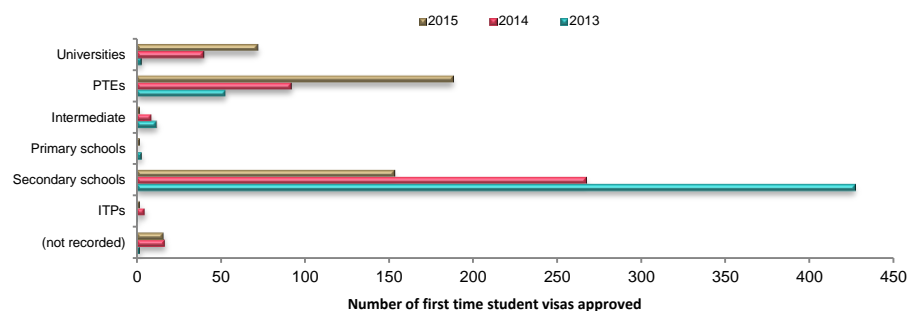
February RSV		February FSV		February TSV	
↑ 23	82%	↑ 63	93%	↑ 86	90%

YTD RSV		YTD FSV		YTD TSV	
↑ 34	72%	↑ 4	1%	↑ 38	8%

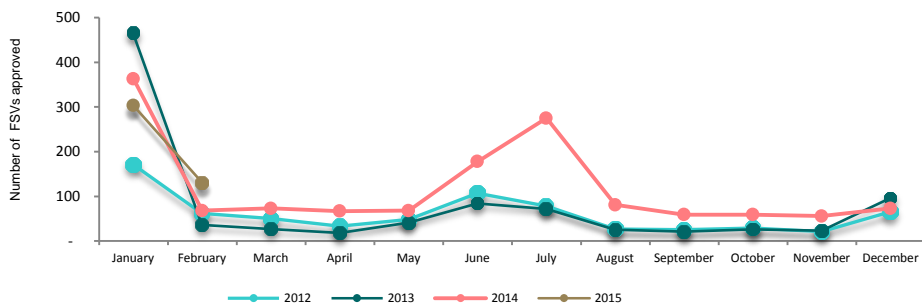
Brazil: Total student visas (TSV) 2012 - 2015



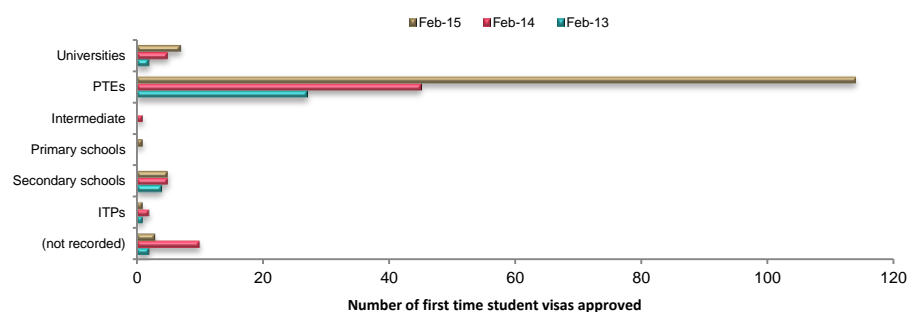
Brazil: First time student visas issued by sector, YTD



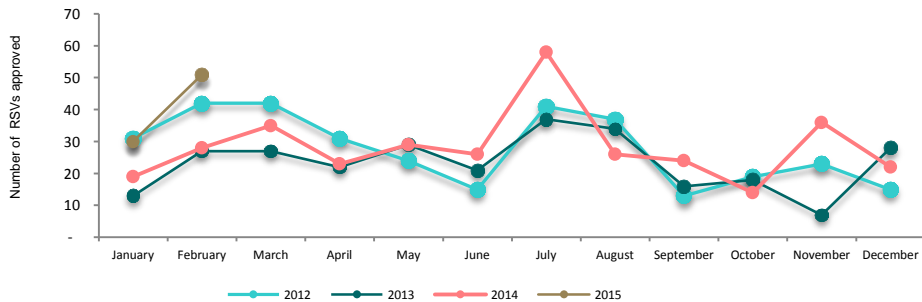
Brazil: First time student visas (FSV) 2012 - 2015



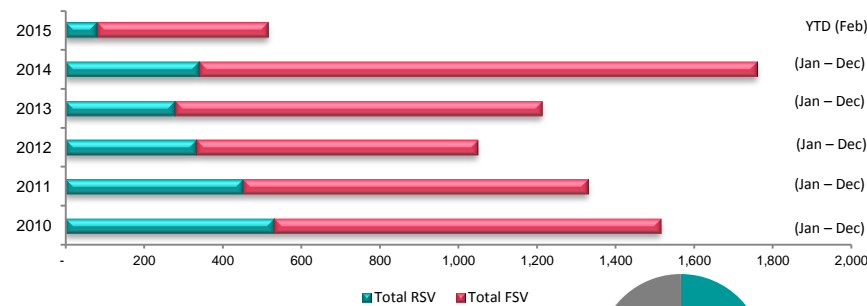
Brazil: First time student visas issued by sector, February



Brazil: Renewed student visas (RSV) 2012 - 2015



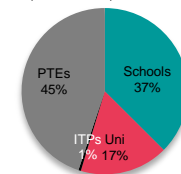
Brazil: Cumulative total for RSV vs. FSV 2010 - 2015






Takeaways:

- Despite a significant decline in January, the YTD position for this market is relatively strong, up 8% (38 TSVs).

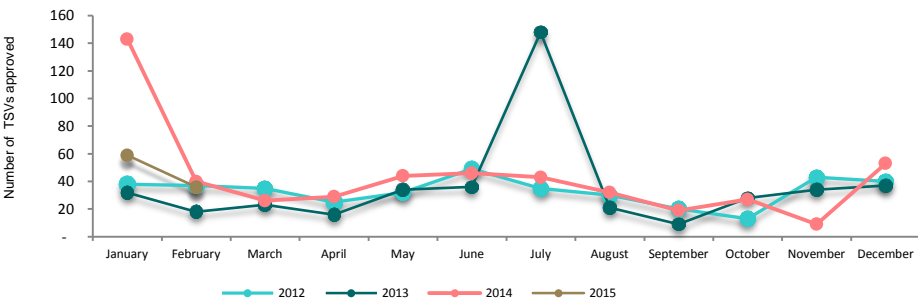
YTD 2015 sector breakdown of FSVs



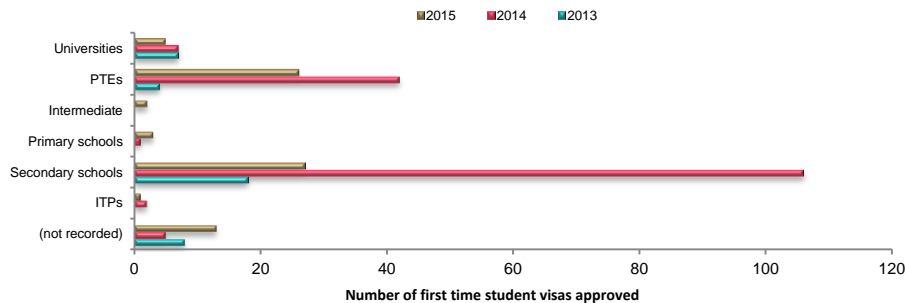
February RSV		February FSV		February TSV	
 0	0%	 -4	-14%	 -4	-10%

YTD RSV		YTD FSV		YTD TSV	
 -2	-10%	 -86	-53%	 -88	-48%

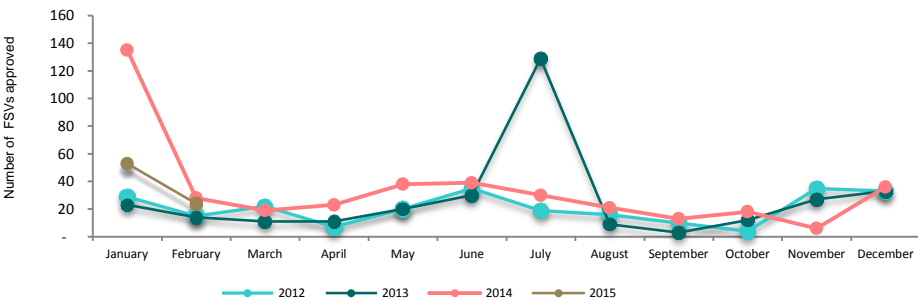
Chile: Total student visas (TSV) 2012 - 2015



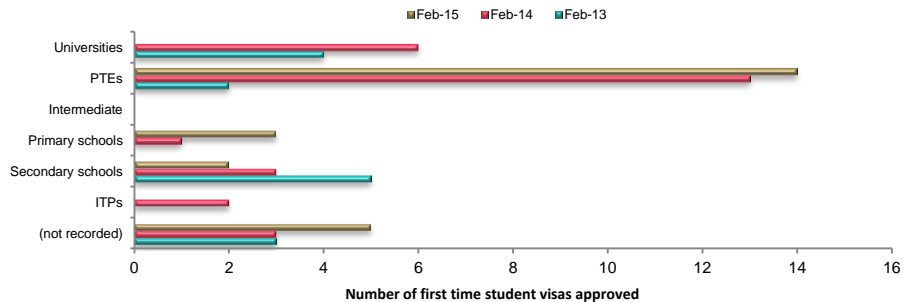
Chile: First time student visas issued by sector, YTD



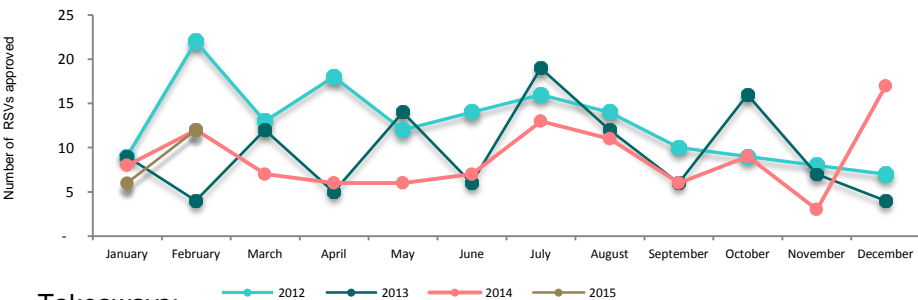
Chile: First time student visas (FSV) 2012 - 2015



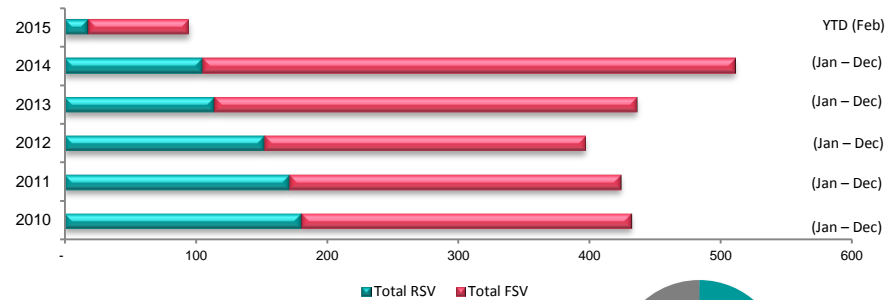
Chile: First time student visas issued by sector, February



Chile: Renewed student visas (RSV) 2012 - 2015



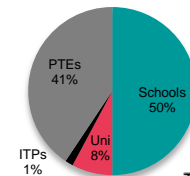
Chile: Cumulative total for RSV vs. FSV 2010 - 2015









Takeaways:

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

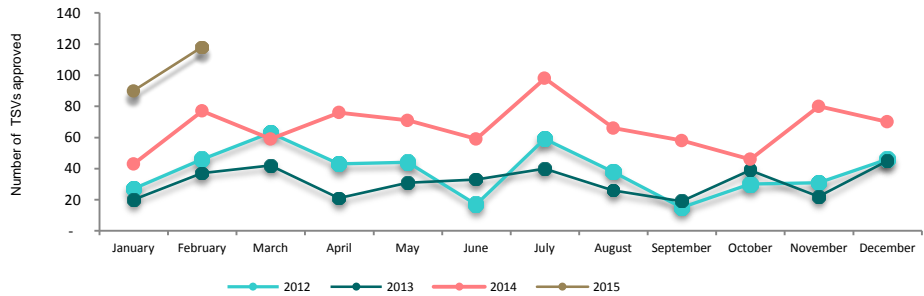
YTD 2015 sector breakdown of FSVs



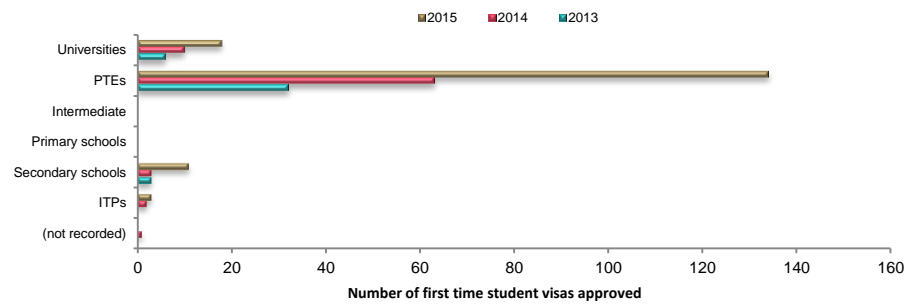
February RSV		February FSV		February TSV	
	-2		43		53%
-7%	90%	41	53%		

YTD RSV		YTD FSV		YTD TSV	
	1		87		73%
2%	110%	88	73%		

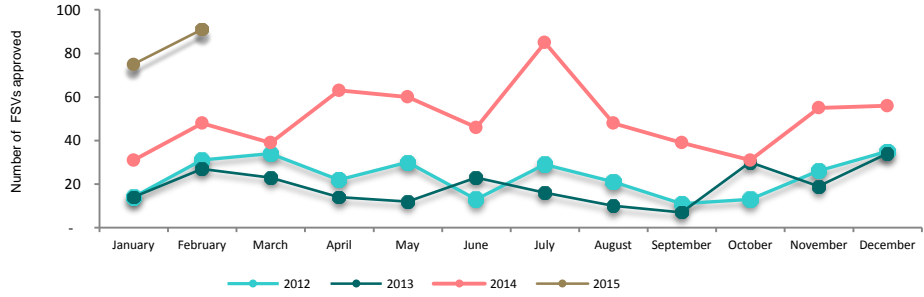
Colombia: Total student visas (TSV) 2012 - 2015



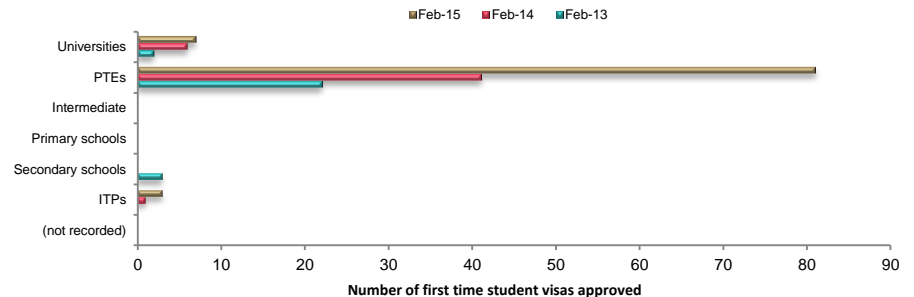
Colombia: First time student visas issued by sector, YTD



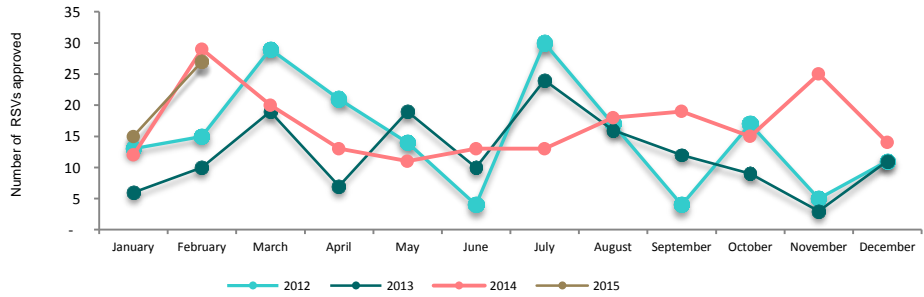
Colombia: First time student visas (FSV) 2012 - 2015



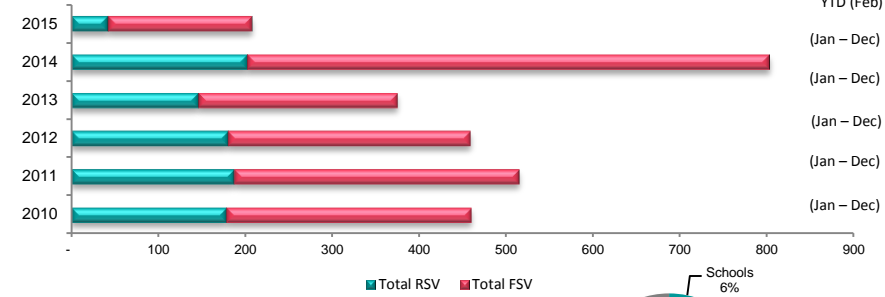
Colombia: First time student visas issued by sector, February



Colombia: Renewed student visas (RSV) 2012 - 2015



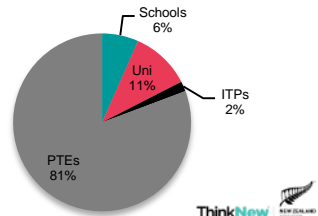
Colombia: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market has experienced significant growth up 73% (88 TSVs) YTD.
- While the absolute numbers are relatively small, the university, PTE and schools sectors have experienced strong growth.

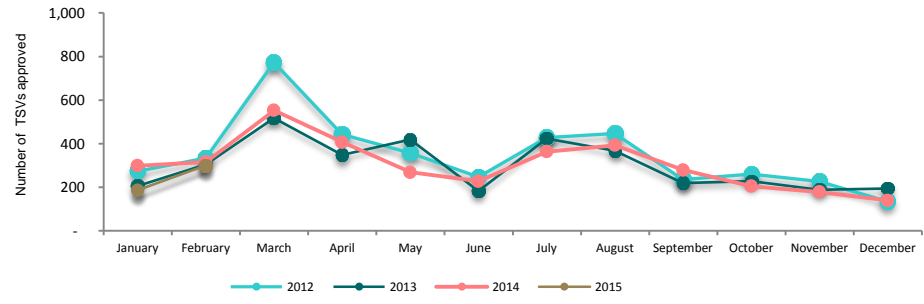
YTD 2015 sector breakdown of FSVs



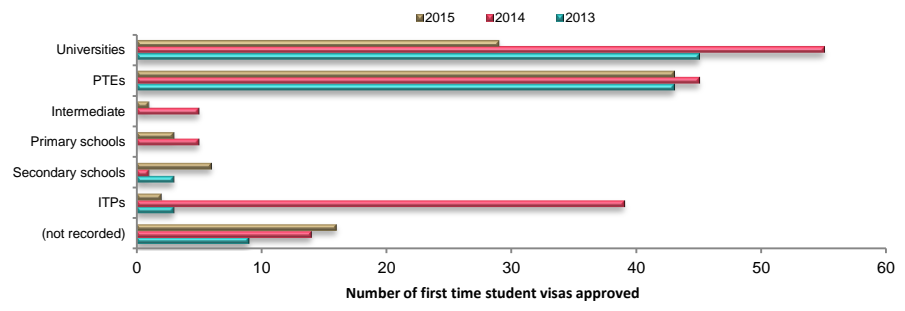
February RSV		February FSV		February TSV	
↓ -9	-3%	↓ -8	-14%	↓ -17	-5%

YTD RSV		YTD FSV		YTD TSV	
↓ -65	-14%	↓ -64	-39%	↓ -129	-21%

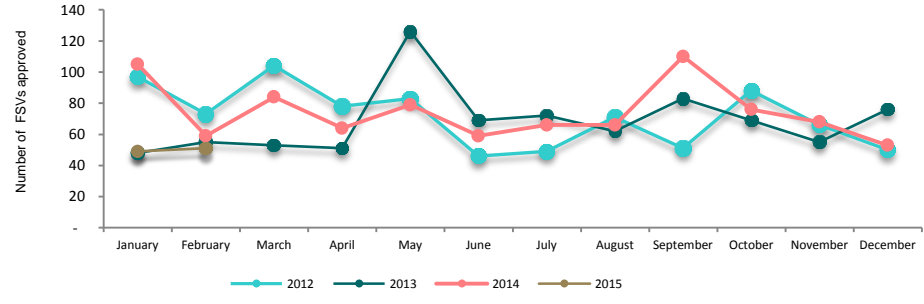
Middle East: Total student visas (TSV) 2012 - 2015



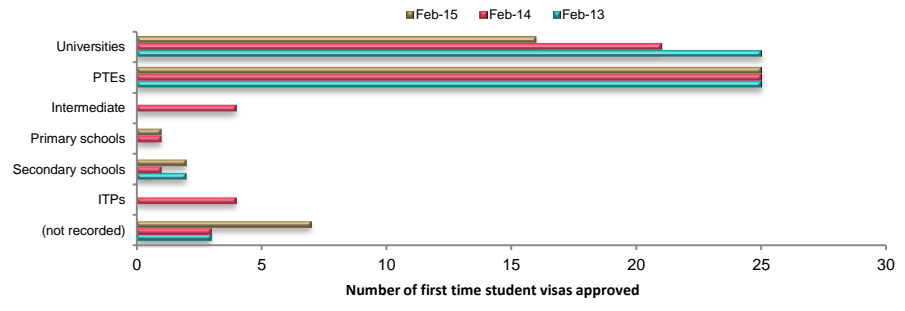
Middle East: First time student visas issued by sector, YTD



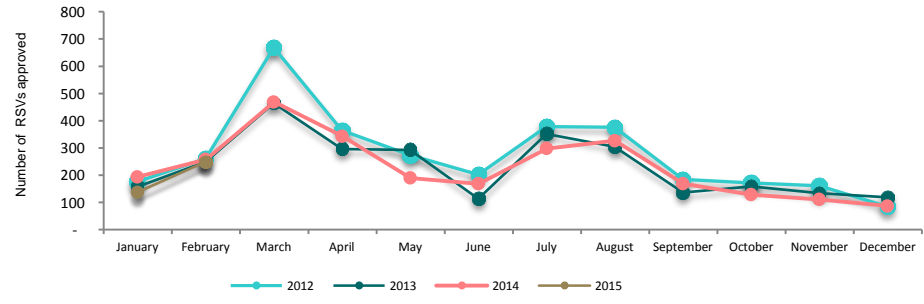
Middle East: First time student visas (FSV) 2012 - 2015



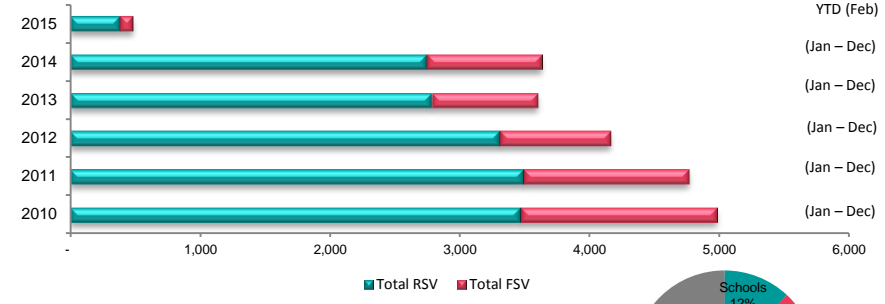
Middle East: First time student visas issued by sector, February



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



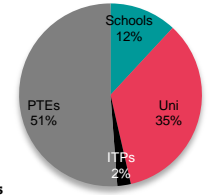
Middle East: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:




- This market continues to experience negative results.
- The university and ITP sectors have experienced the most significant declines, down 47% (-26) and 95% (-37).

YTD 2015 sector breakdown of FSVs



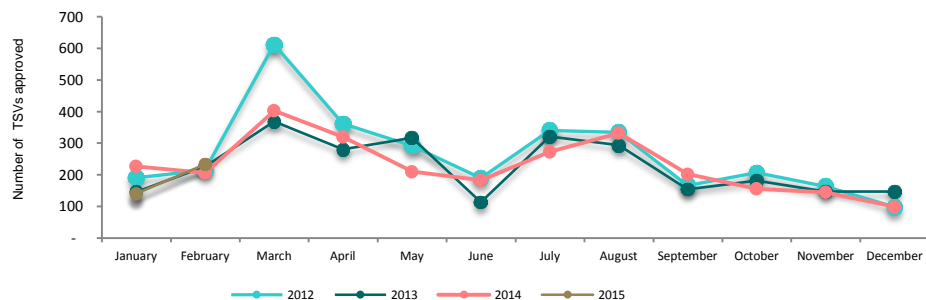
Saudi Arabia:

YTD (January to February)

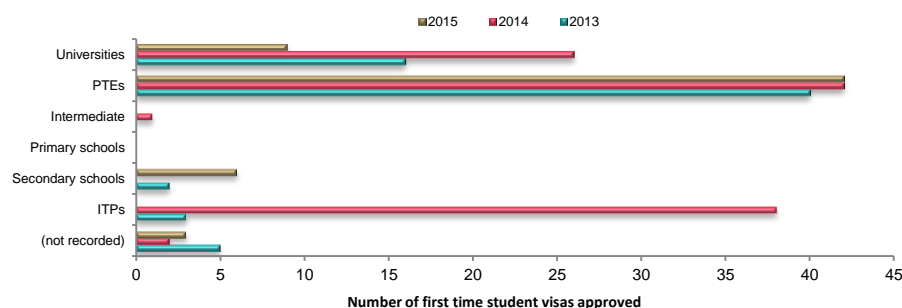
February RSV		February FSV		February TSV	
	28 16%		0 0%		28 14%

YTD RSV		YTD FSV		YTD TSV	
	-9 -3%		-49 -45%		-58 -13%

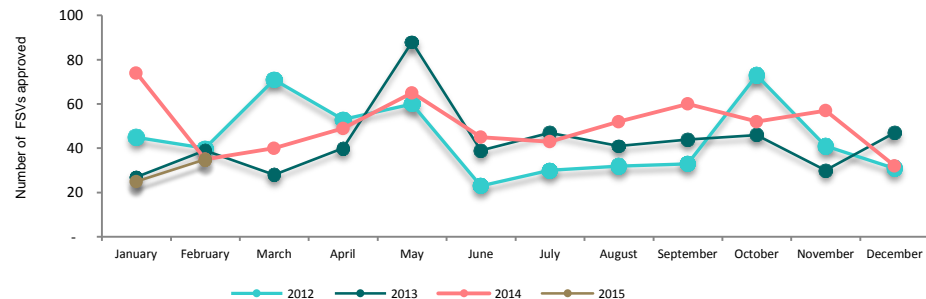
Saudi Arabia: Total student visas (TSV) 2012 - 2015



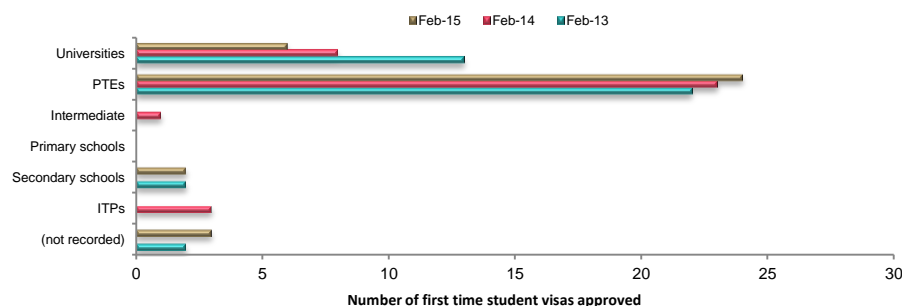
Saudi Arabia: First time student visas issued by sector, YTD



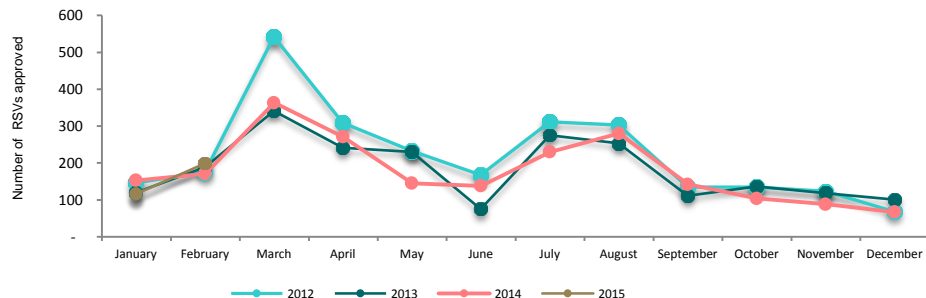
Saudi Arabia: First time student visas (FSV) 2012 - 2015



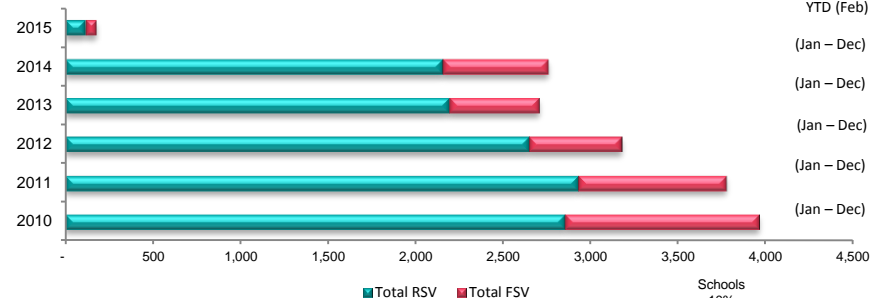
Saudi Arabia: First time student visas issued by sector, February



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



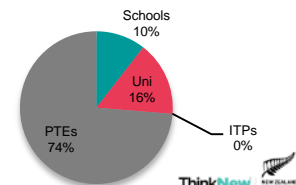
Saudi Arabia: Cumulative total for RSV vs. FSV 2010 - 2015









Takeaways:

- This market continues to experience negative results.
- The university and ITP sectors have experienced the most significant declines, down 65% (-17) and 100% (-38).

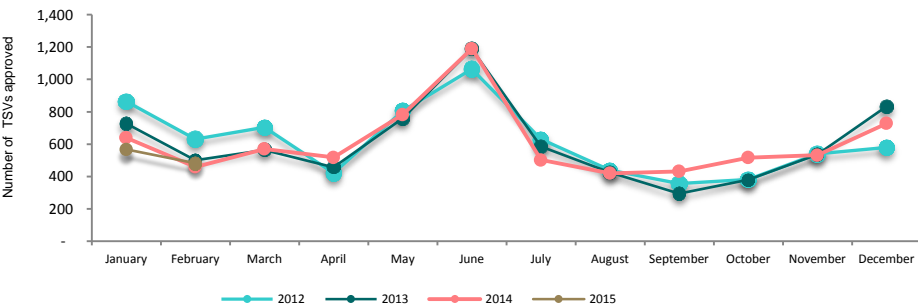
YTD 2015 sector breakdown of FSVs



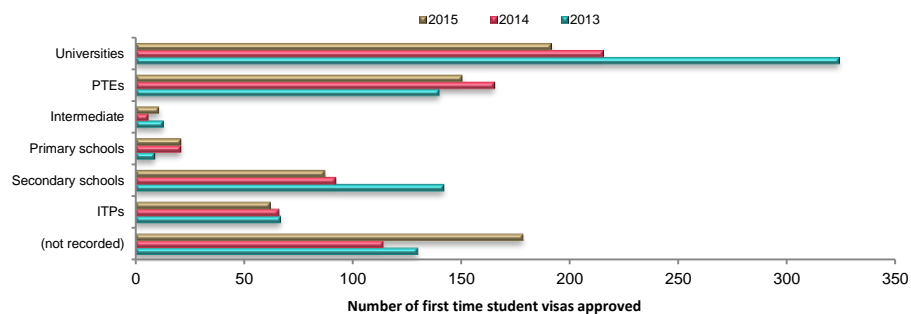
February RSV		February FSV		February TSV	
 -10	-4%	 33	14%	 23	5%

YTD RSV		YTD FSV		YTD TSV	
 -69	-16%	 21	3%	 -48	-4%

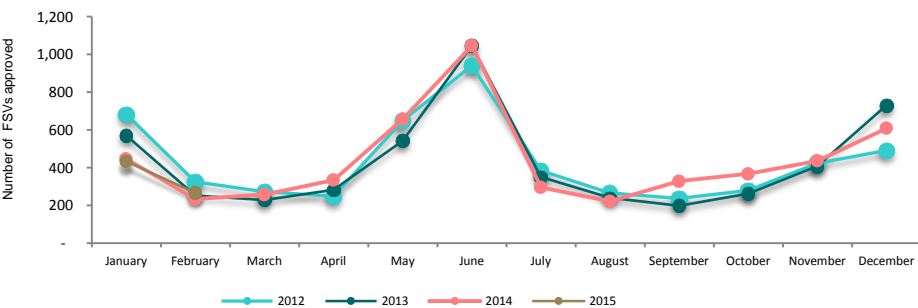
Europe: Total student visas (TSV) 2012 - 2015



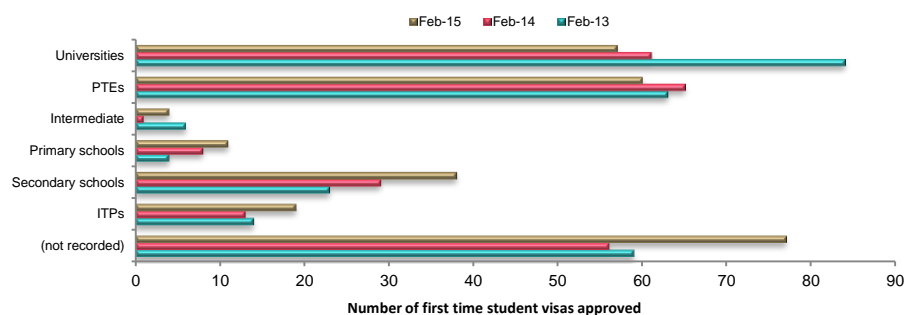
Europe: First time student visas issued by sector, YTD



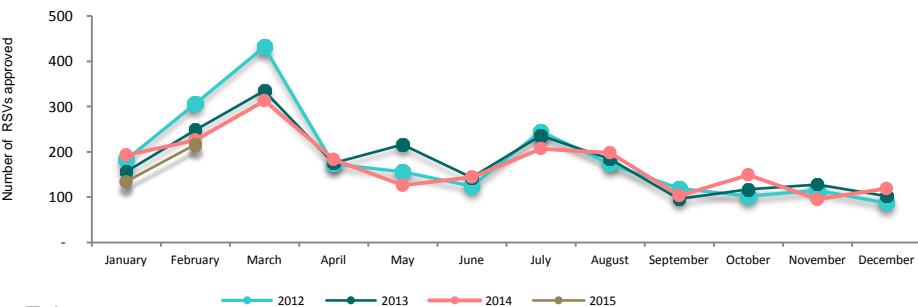
Europe: First time student visas (FSV) 2012 - 2015



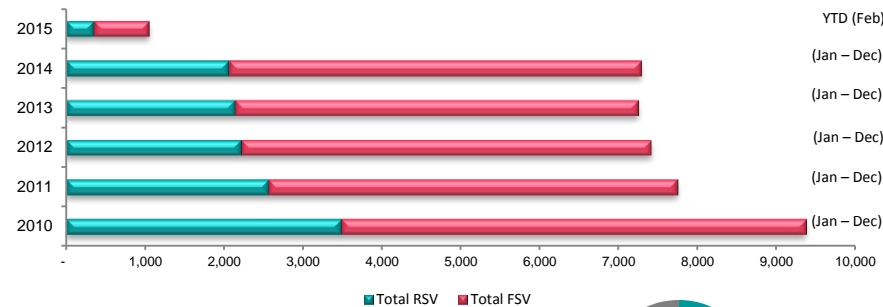
Europe: First time student visas issued by sector, February



Europe: Renewed student visas (RSV) 2012 - 2015



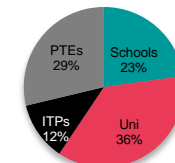
Europe: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- TSVs continue to decline, down 4%. This is driven by a decline in RSVs. FSVs have seen a relatively positive result up 3% (21).
- Though from a small base, February saw an increase in the ITP, primary and secondary school sectors up 46% (6), 38% (3) and 31% (9).

YTD 2015 sector breakdown of FSVs



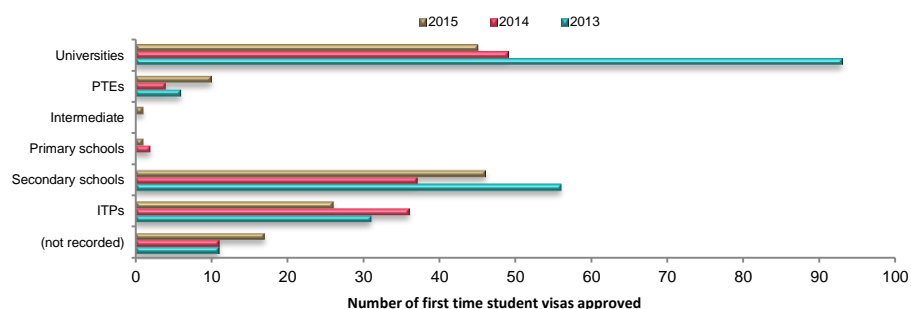
February RSV		February FSV		February TSV	
↓	-8	↑	22	↑	14
	-27%		76%		24%

YTD RSV		YTD FSV		YTD TSV	
↓	-7	↑	7	→	0
	-12%		5%		0%

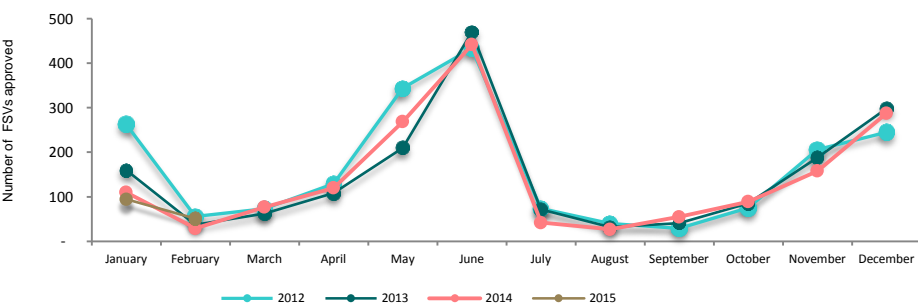
Germany: Total student visas (TSV) 2012 - 2015



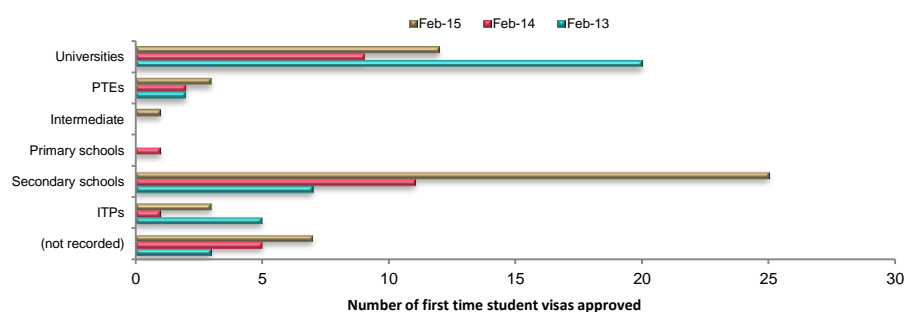
Germany: First time student visas issued by sector, YTD



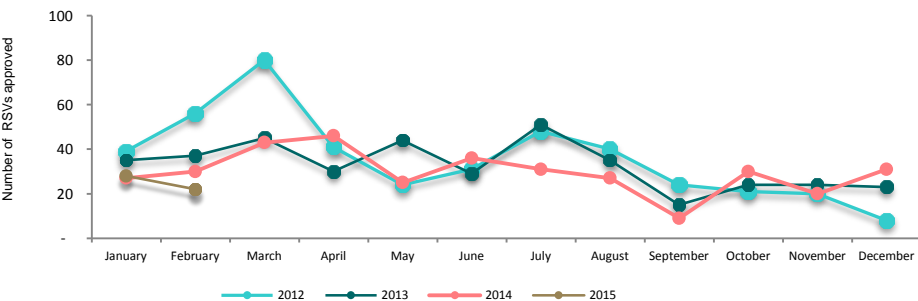
Germany: First time student visas (FSV) 2012 - 2015



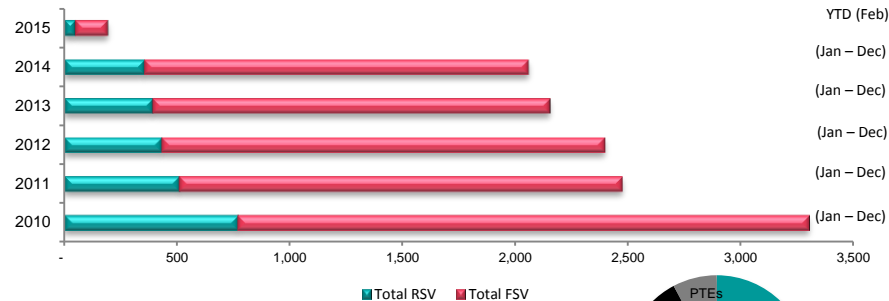
Germany: First time student visas issued by sector, February



Germany: Renewed student visas (RSV) 2012 - 2015



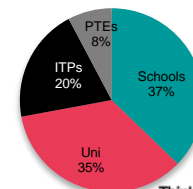
Germany: Cumulative total for RSV vs. FSV 2010 - 2015



Takeaways:

- This market continues to track at a flat position.
- February saw an increase in university, ITP and secondary school FSVs.

YTD 2015 sector breakdown of FSVs



Student Visa Dashboard February 2015

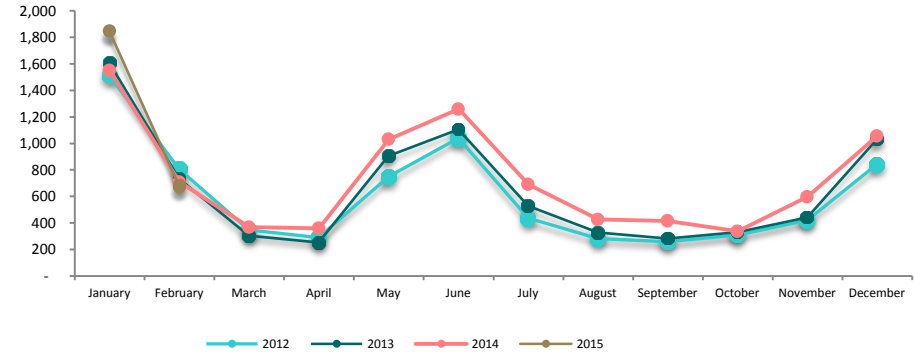
Overall:
Sector overview



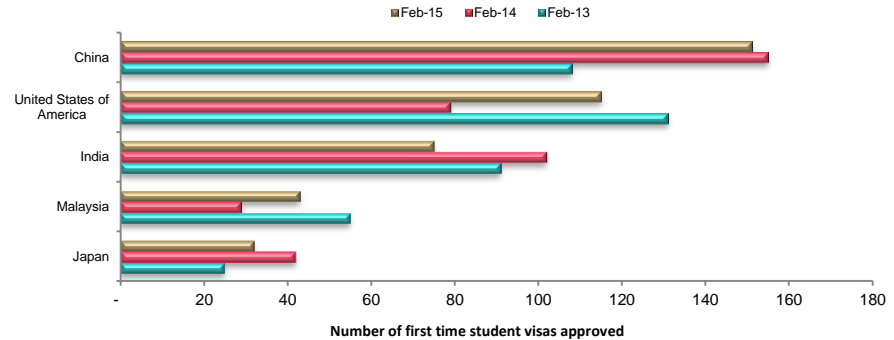
February FSV		YTD FSV	
 -30	-4%	 267	12%

YTD (January to February)

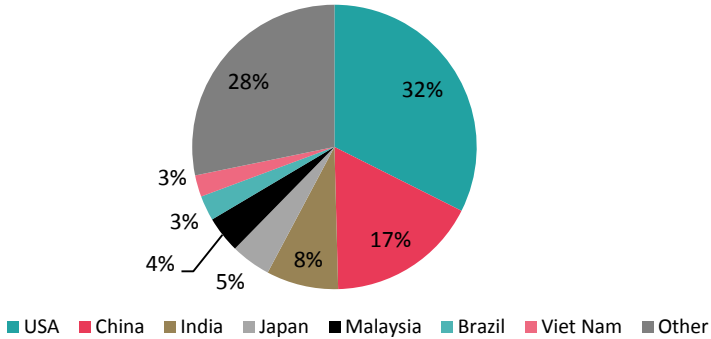
University : Total first time student visas approved (FSV) 2012 - 2015



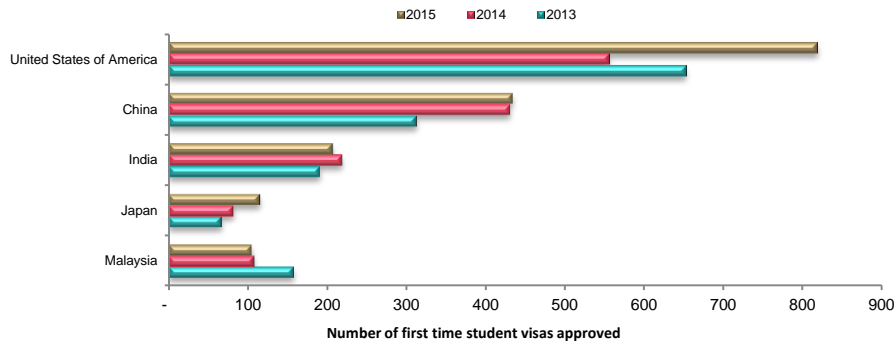
University: First time student visas (FSV) approved February 2013 - 2015



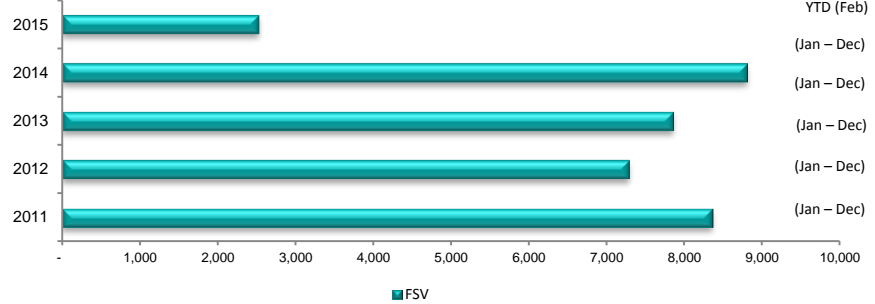
YTD FSV University breakdown by country 2015



University: First time student visas (FSV) approved YTD 2013 - 2015



University : Cumulative total FSV 2011 - 2015



- Takeaways:
- The university sector has started the 2015 year strongly, up 12% (267).
 - This growth was driven by USA, up 47% (263) YTD.
 - The USA accounts for 32% of all FSV approvals YTD.

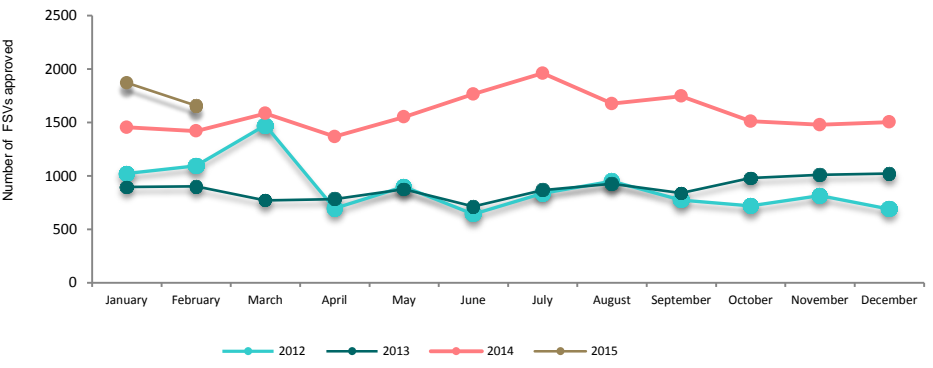
Private Training Establishments (PTE):



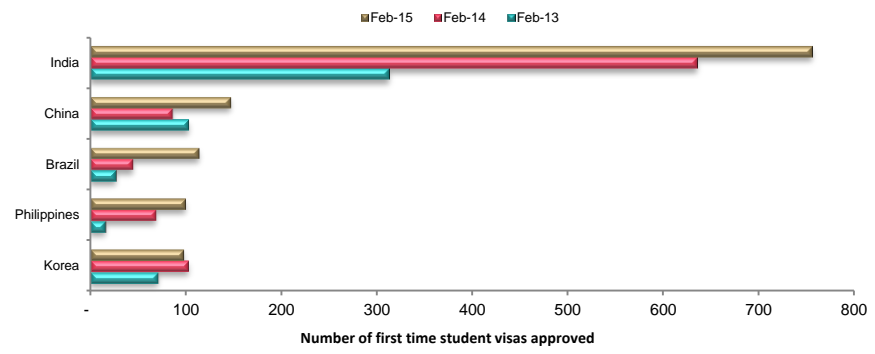
February FSV		YTD FSV	
↑ 237	17%	↑ 654	23%

YTD (January to February)

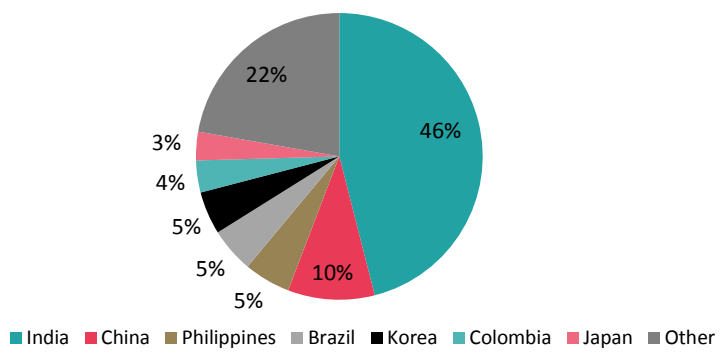
PTEs: Total first time student visas approved (FSV) 2012 - 2015



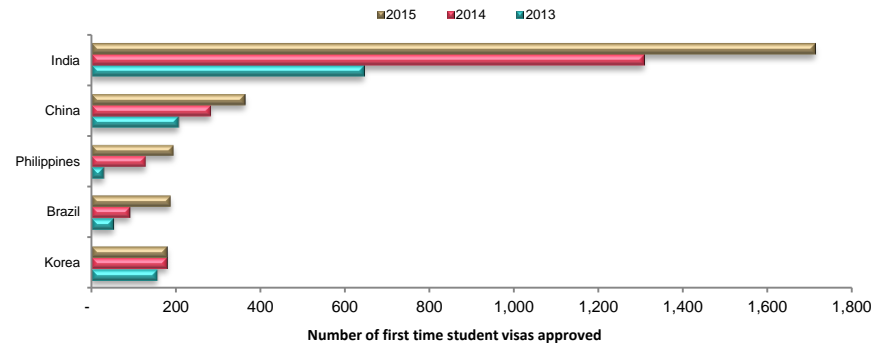
PTEs: First time student visas (FSV) approved February 2013 - 2015



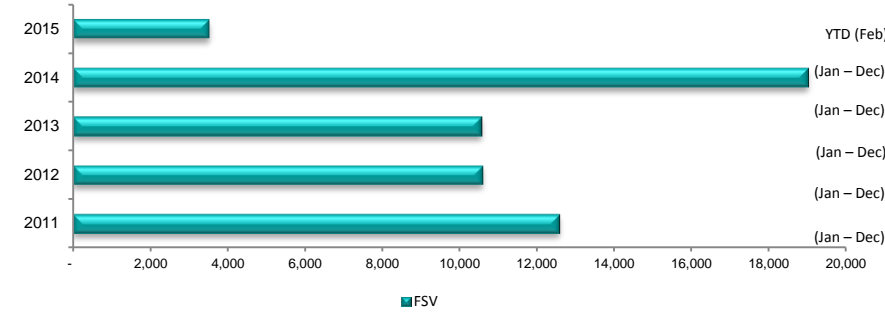
YTD FSV PTE breakdown by country 2015



PTEs: First time student visas (FSV) approved YTD 2013 - 2015



PTEs: Cumulative total FSV 2011 - 2015



Takeaways:

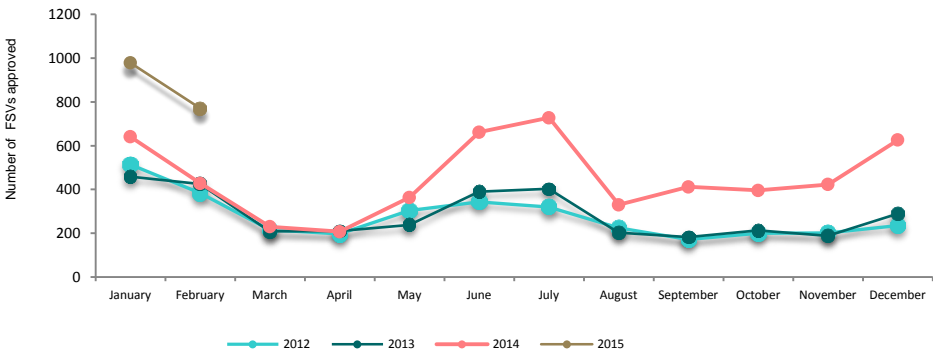
- Following a strong finish to 2014, 2015 is tracking strongly up 23% (654).
- 46% of all FSV approvals are from India.

Institutes of Technology and Polytechnics (ITPs):

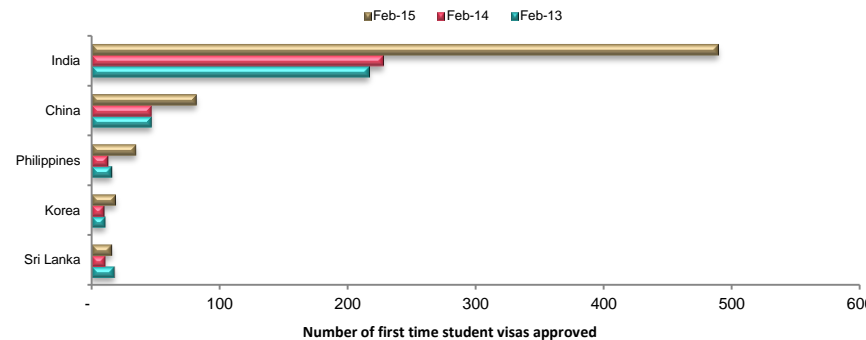
February FSV		YTD FSV	
↑ 344	80%	↑ 683	64%

YTD (January to February)

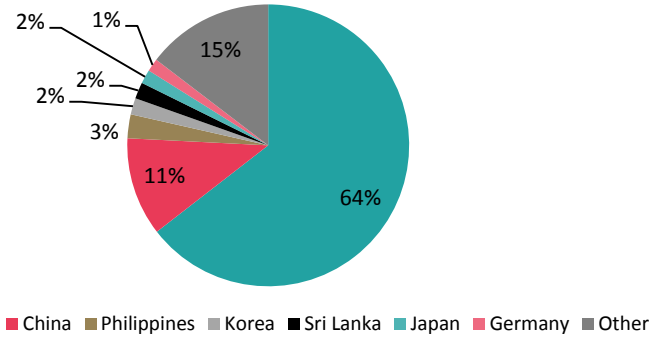
ITPs: Total first time student visas (FSV) approved 2012 - 2015



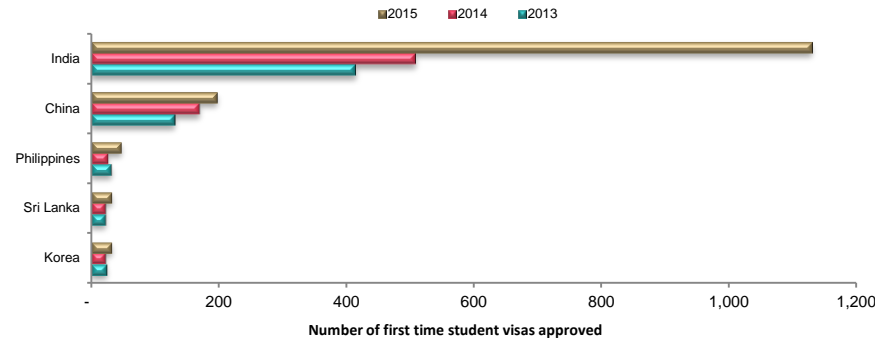
ITPs: First time student visas (FSV) approved February 2013 - 2015



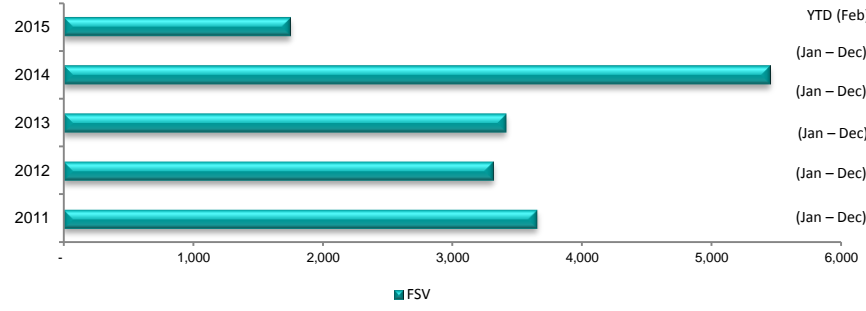
YTD FSV ITPs breakdown by country 2015



ITPs: First time student visas (FSV) approved YTD 2013 - 2015





ITPs: Cumulative total FSV 2011 - 2015



Takeaways:

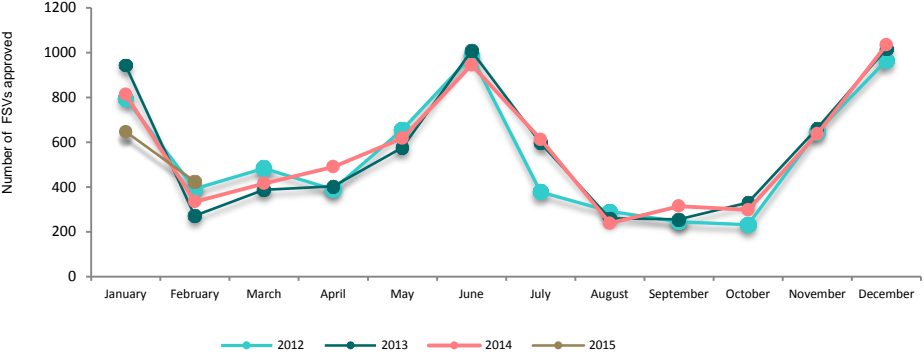
- After experiencing a strong 2014, the ITP sector has continued to see strong growth, up 64% (683) YTD.
- This growth was driven by the Indian market which represents 64% of all FSVs approved YTD.

Secondary schools:

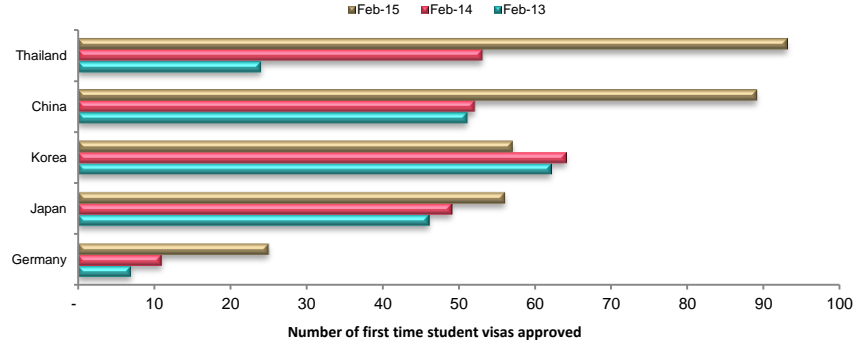
February FSV		YTD FSV	
	90	27%	 -76
			-7%

YTD (January to February)

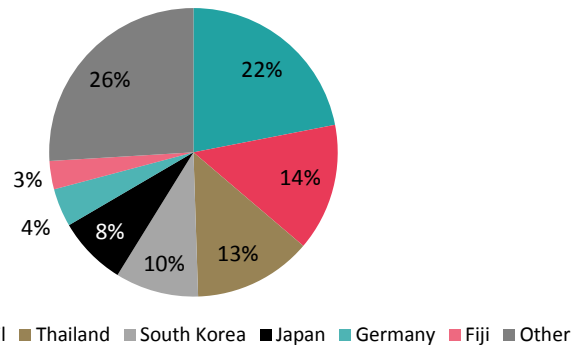
Secondary schools: Total first time student visas (FSV) approved 2012 - 2015



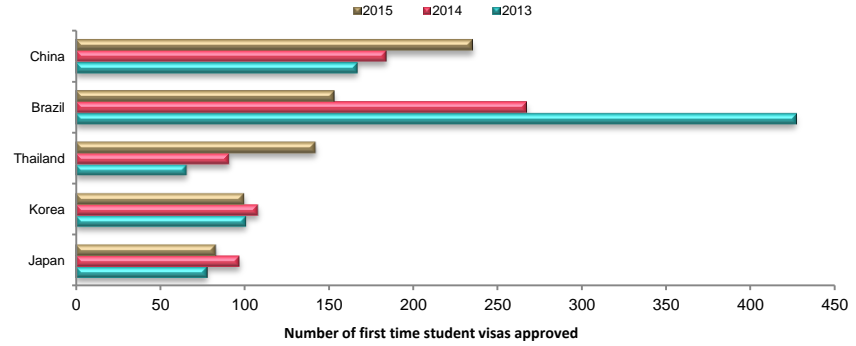
Secondary schools: First time student visas (FSV) approved February 2013 - 2015



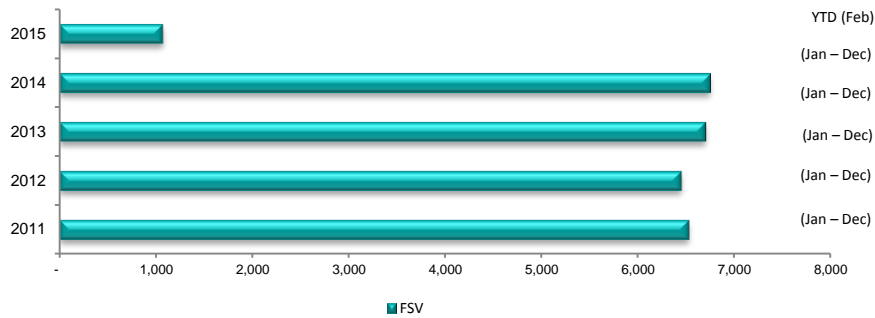
YTD FSV Secondary schools breakdown by country 2015



Secondary schools: First time student visas (FSV) approved YTD 2013 - 2015





Secondary schools: Cumulative total FSV 2011 - 2015



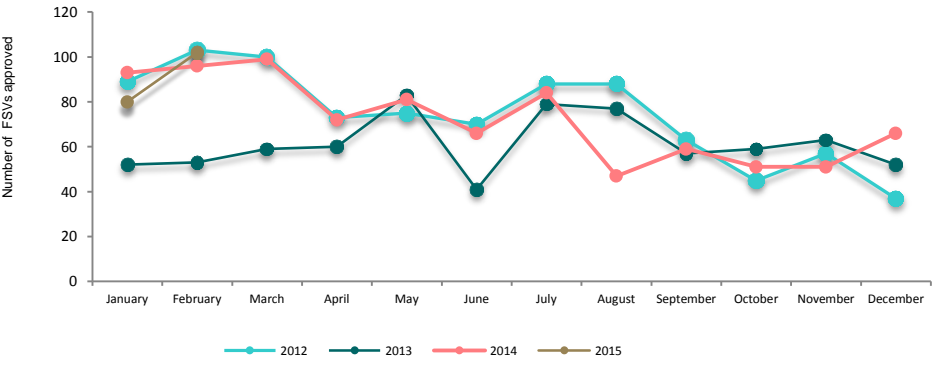
Takeaways:

- This sector has started the 2015 year in a negative position, down 7% (-76), which was driven by a loss in scholarship students from Latin America in January.
- February approvals have grown by 27% (90).
- Chinese, Brazilian and Thai students represent the majority of FSV approvals YTD.

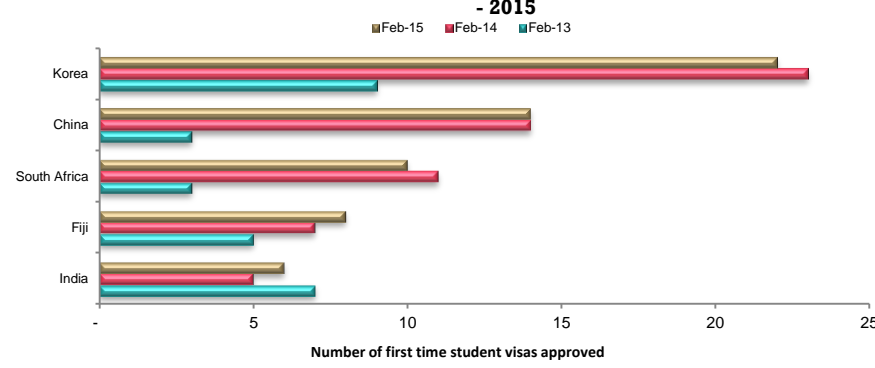
Primary schools:

February FSV		YTD FSV	
	6	6%	 -7
			-4%

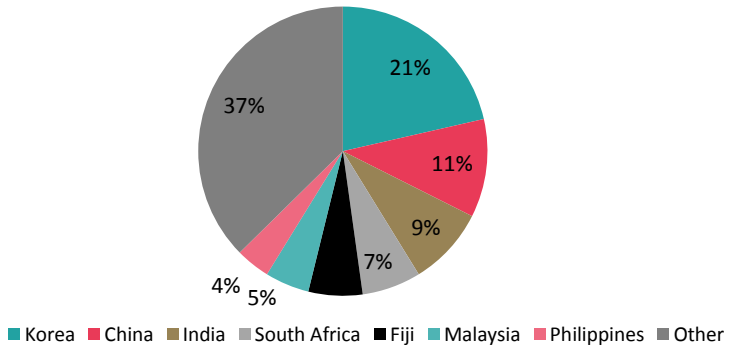
Primary schools: Total first time student visas (FSV) approved 2012 - 2015



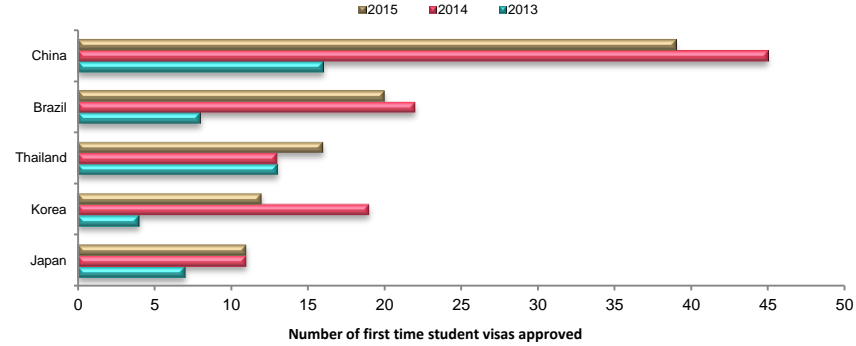
YTD (January to February)
Primary schools: First time student visas (FSV) approved February 2013 - 2015



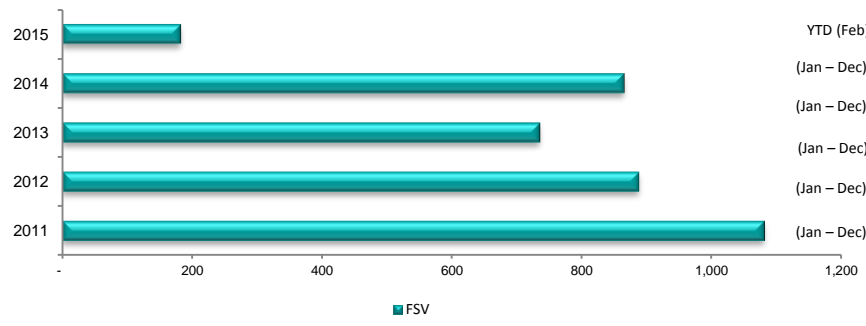
YTD FSV Primary schools breakdown by country 2015



Primary schools: First time student visas (FSV) approved YTD 2013 - 2015





Primary schools: Cumulative total FSV 2011 - 2015



Takeaways:

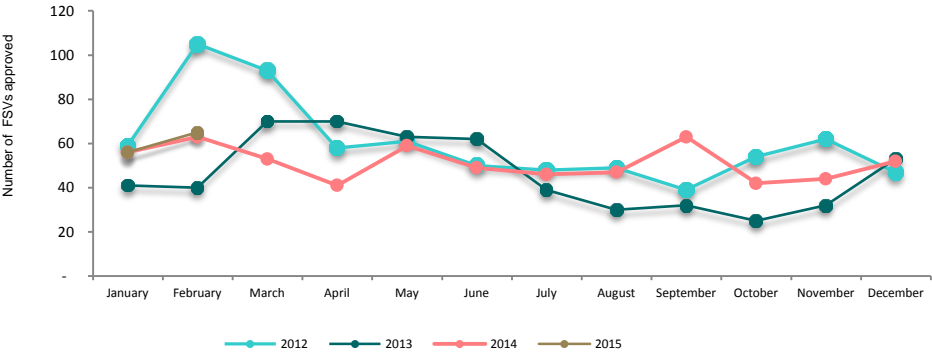
- The primary school sector has had a slow start to the year, down 4% (-7).

Intermediate schools:

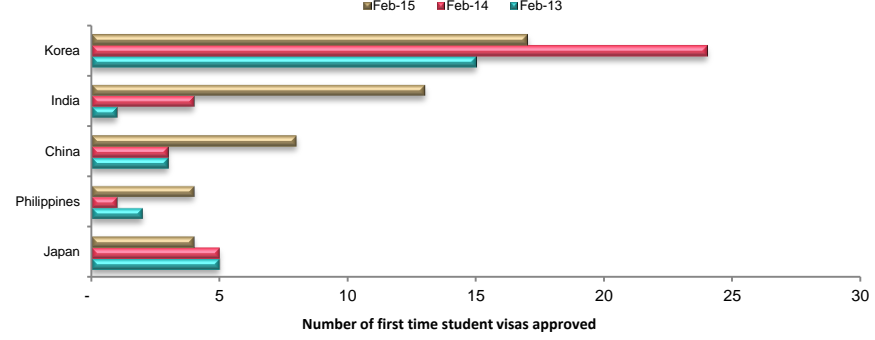
FSV February		FSV YTD	
	2	3%	 2
			2%

YTD (January to February)

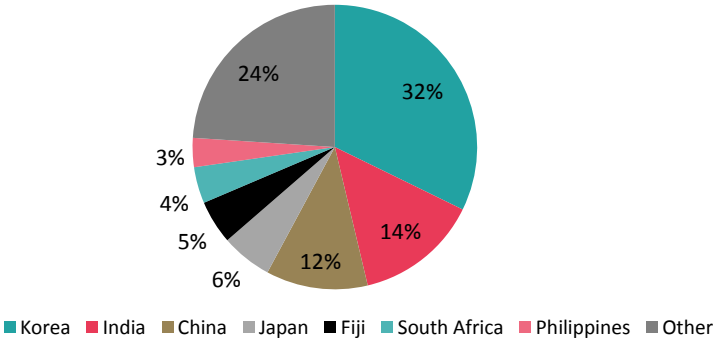
Intermediate: Total first time student visas approved (FSV) 2012 - 2015



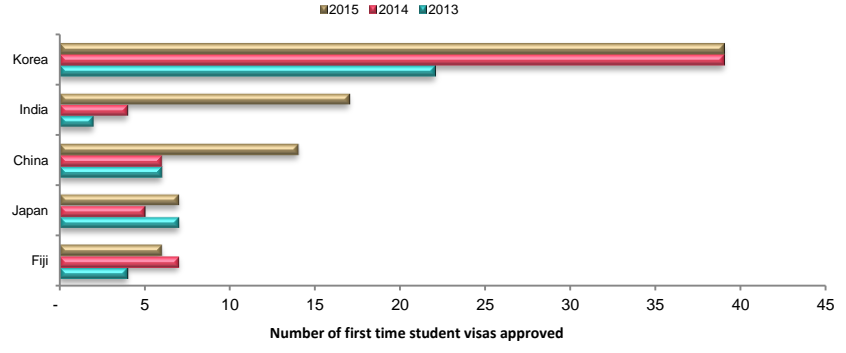
Intermediate: First time student visas (FSV) approved February 2013 - 2015



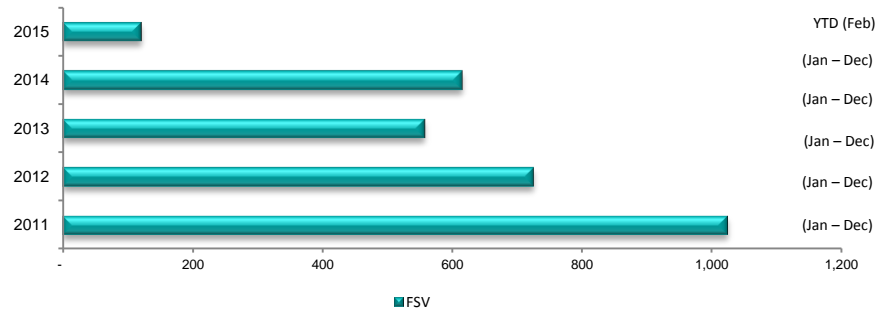
YTD FSV Intermediate breakdown by country 2015



Intermediate: First time student visas (FSV) approved YTD 2013 - 2015



Intermediate: Cumulative total FSV 2011 - 2015



- Takeaways:**
- This sector has experienced a relatively flat start to 2015.
 - The majority of approvals YTD came from Korea, India and China.