

Updated Snapshot: China (CHN)

Statement

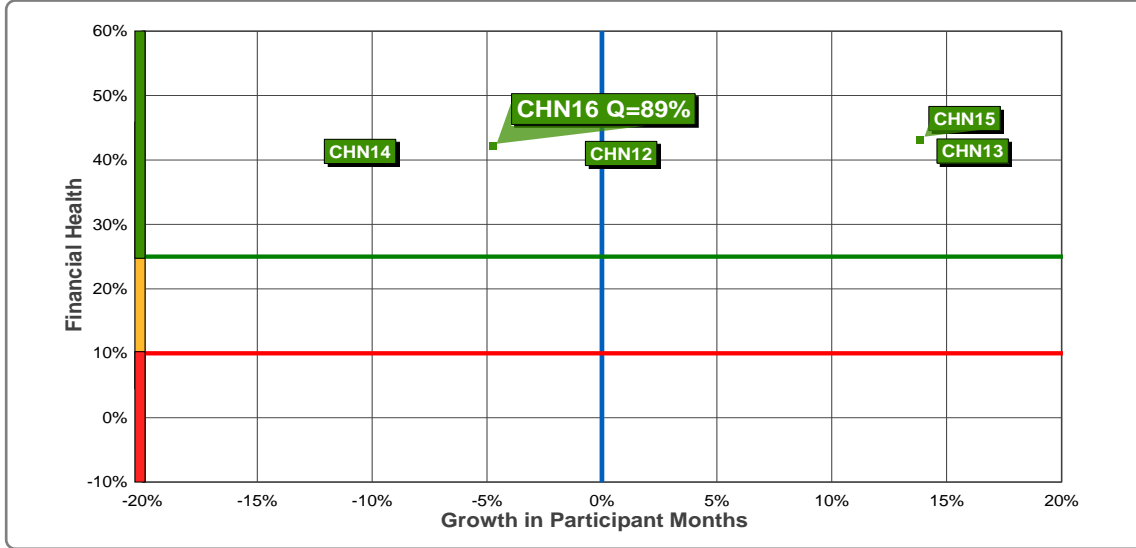


Partner Organizations 2016

ARG	AUS	AUT	BFL	BFR	BIH	BOL	BRA	CAN	CHI
CHN	COL	CRC	CRO	CZE	DEN	DOM	ECU	EGY	ESP
FIN	FRA	GER	GHA	GUA	HKG	HON	HUN	INA	IND
ISL	ITA	JPN	KEN	KOR	LAT	MAS	MEX	NED	NOR
NZL	PAN	PAR	PER	PHI	POL	POR	RSA	RUS	SLO
SRB	SUI	SVK	SWE	THA	TUN	TUR	USA	VEN	

■ Sending to: 19
 ■ Hosting from: 26

3D Health Indicators 2012-2016



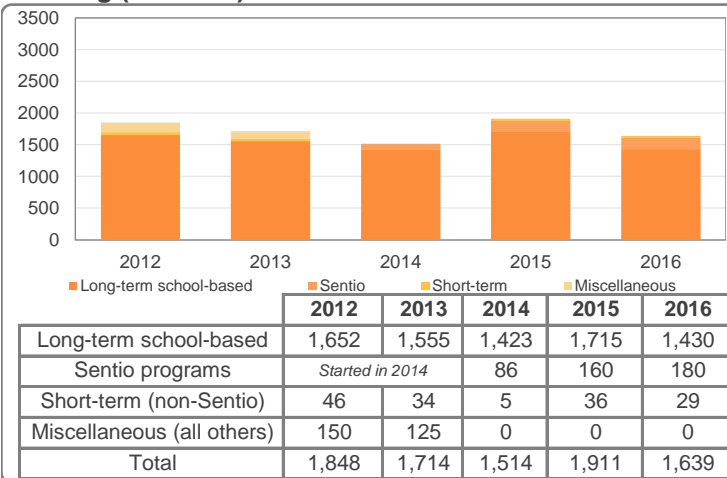
KPIs

Yr	Growth	Finances	Quality
16	-5%	42%	89%
15	+14%	43%	88%
14	-12%	41%	92%
13	+14%	41%	87%
12	-1%	41%	88%

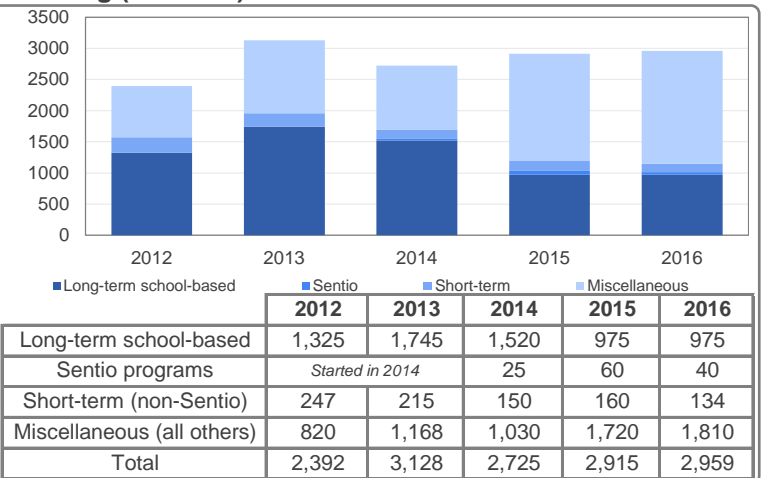
NPPR Status

Yr	Phase
16	No phase
15	No phase
14	No phase
13	No phase
12	N/A

Sending (Pax Mos) 2012-2016



Hosting (Pax Mos) 2012-2016



Quality Assessment 2014-2016

Quality	Hosting CSE				Sending CSE				PSE	Overall Eval Score	Bonus/ Penalty	Final Quality Score
	host fam	school	other stu	other nat fam	stu	nat fams	other host fams	other schools				
2016 Network Total	78%	85%	94%	92%	94%	92%	78%	85%	92%	88%	-1%	87%
2016 (CSE16, PSE16-15)	96%	96%	92%	92%	95%	94%	62%	76%	77%	87%	+2%	89%
2015 (CSE15, PSE15-14)	97%	94%	90%	91%	94%	95%	59%	79%	79%	86%	+2%	88%
2014 (CSE14, PSE14-13)	97%	96%	92%	92%	95%	94%	69%	92%	79%	90%	+2%	92%

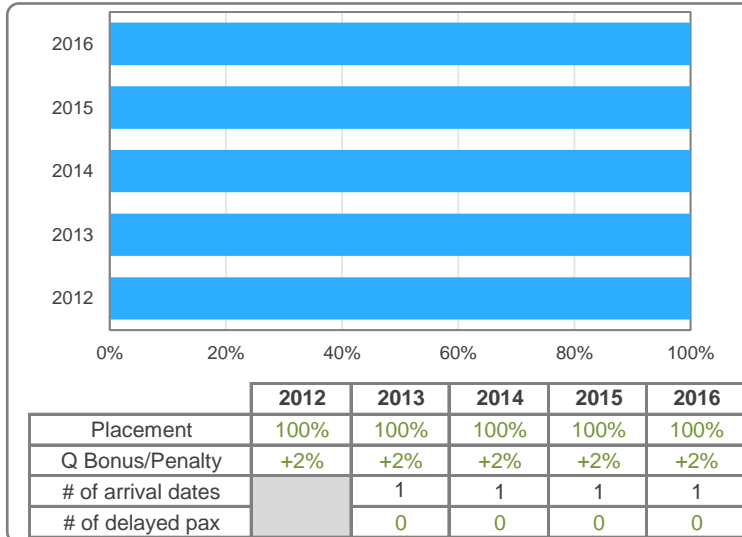
Key Financial Numbers in Effective USD 2013-2015

Finances	Annual Turnover	% of total	Total Expenses	% of total	Net Results	% of unr. net assets	Current Assets	% of expenses	Unr. Net Assets	% of expenses
2015 Network Total	183,453,070	100%	178,003,152	100%	5,449,918	8%	116,051,027	65%	70,545,137	40%
2015	4,022,535	2%	3,920,555	2%	101,980	6%	3,071,667	78%	1,650,252	42%
2014	3,731,024	2%	3,641,573	2%	89,451	6%	2,430,688	67%	1,569,212	43%
2013	3,604,479	2%	3,553,536	2%	50,943	3%	1,593,207	45%	1,468,459	41%

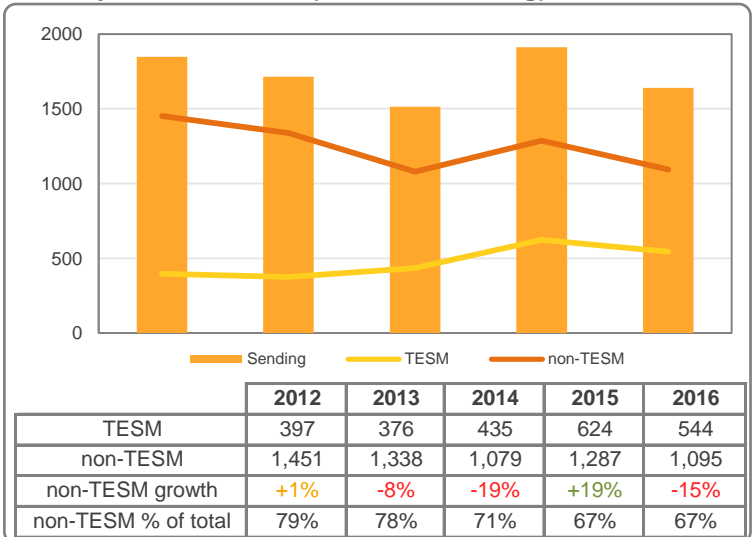
***Unrestricted Net Assets is meaningless because these are negative

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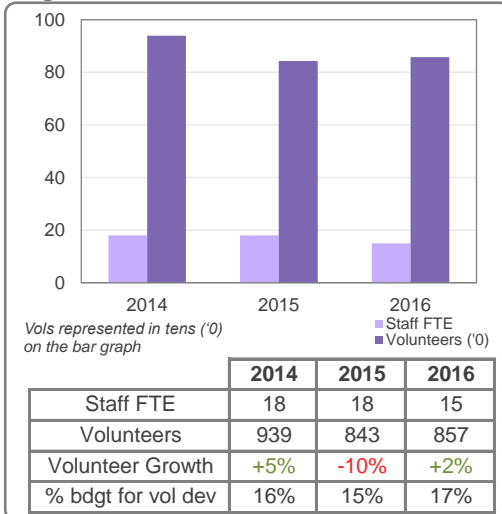
On-time Placement Performance



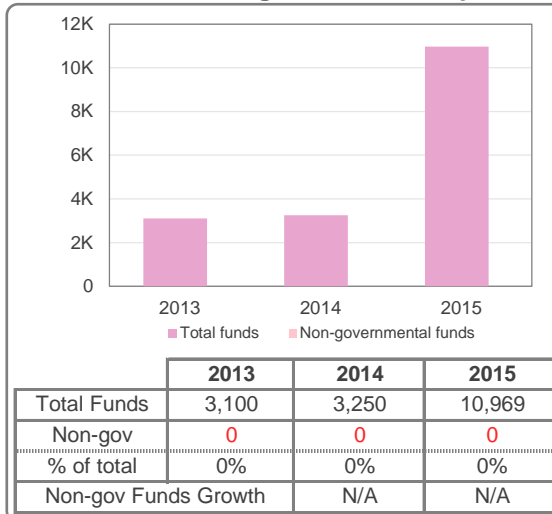
Country Diversification (Pax Mos Sending)



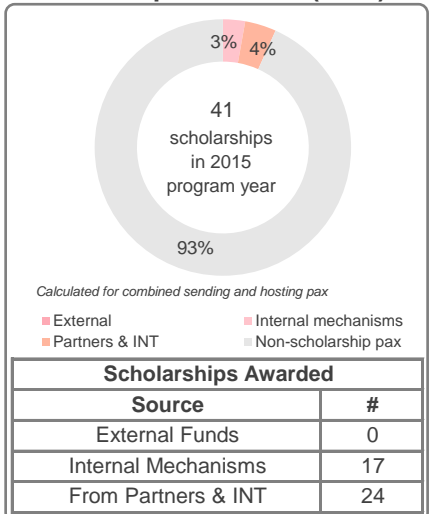
Organizational Structure



External Fundraising for Scholarships



Scholarships Awarded (2015)



Education and ICL

Learning Program Participants (started and completed)			
Level	W	1 - 3	QT
Staff & Vols	122	15	3
% of Total	14.0%	1.7%	0.3%

W = What Every AFSer Should Know About Intercultural Learning.
1 - 3 = LP levels 1, 2, and 3; QT = Qualified Trainers

Orientations								
	PD	A	PA	MS	PR	EOS	PoR	Other
Pax	●	●	●	●	●	●	●	●
Host Fams	●	●	●	●	●			
Nat Fams	●						●	
Sch/CPOs	●	●	●	●	●	●	●	●
Attendance:	0% (blank)	1-25% ●	26-50% ●	51-75% ●	76-100% ●			

PD = pre-departure, A = arrival, PA = post-arrival, MS = mid-stay, PR = pre-return, EOS = end-of-stay, PoR = post-return, Oth = other

AFS Market Share and Competitor Landscape

Estimated Market Share (Latest Year Available)		
Outbound	Inbound non-fee paying	Inbound fee & non-fee
0.1%	N/A	N/A

Non-fee paying = not paying tuition and hosted in volunteer host families;
Fee paying = paying tuition and often hosted in paid host families

Competitors	
Sending (sc programs)	Hosting (sc programs)
AYA, AYC, YFU, International Class	Hanban, International High Schools
Sending (18+ programs)	Hosting (18+ programs)
Hanban, Go Abroad, CCIWS, AAG, AIESEC, CIEE, New Oriental, EF, Wall Street	Universities and schools, Hanban

Educational System and Accreditation

Educational Designation & Credit Agreement	
■	Designated as an Educational Entity
■	(Full) Credit Agreement
■	(Partial) Credit Agreement

Ties to the World around AFS

International Exposure and Collaboration with Others	
■	Joint project/new affiliation
■	External forum or event

Market Environment

Market Trends and Forecasts
The gov. continues to encourage out- and inbound mobility. For 2015 the MoE reports 523,700 Chinese studying overseas, an increase of +13.4% on 2014. Short programs gain popularity and often serve as "testing grounds" for families considering longer exchanges. Language abroad may become more fragmented as prestigious universities and schools overseas enter the market. 2015 inbound statistics show 397,635 foreign students in China, marking an annual increase of 5.46%. The growth is largely fueled by Africa and Asia. The top three sending countries are KOR, USA, and THA.