INTO

INTO Global Agent Survey
2024

Foreword

Welcome to the 2024 edition of INTO's annual Global Agent Survey. This year, the results feel more important than ever. Across the world, there are elections taking place in many of our destination markets and indeed in those from which we welcome students. There are also significant regulatory changes being considered and implemented in many key destination markets which will impact the way in which we operate. This is creating significant volatility, uncertainty and influencing the options available to, and being considered by those seeking to study abroad. The associated challenges are not lost on the global counselling community.

We've witnessed significant discussion in Canada, Australia and the United Kingdom on how to manage immigration and association with international student flows and, with that, an increasing focus on quality and agent regulation. These same issues could also be placed increasingly under the spotlight in the United States with a Presidential election on the horizon.

Students, and the agents counselling them, are responding in turn, with many students hedging their bets, submitting more applications to an increasing number of potential destination countries, creating unprecedented levels of noise. But with each prospective student and associated counsellor there continues to be expectations of great service, for what represents a life changing investment.

We are enormously grateful to the 1240 agents who participated in this survey. By sharing their views, they provide a real insight into the markets in which they operate and guide us as we seek to further enhance the quality, transparency and integrity of services across the entire student journey.

We invite you to read this report and to share its findings. We hope it helps to illuminate some areas where we can improve the experience for students and their advisors who place their trust in us collectively to help shape their futures.

John Sykes.

John Sykes, CEO & Co-Founder

Introduction

At INTO, we've been running global agent surveys for more than ten years. This year we received responses from more than 1240 agency staff from over 65 countries. We have identified eight themes which we have reflected upon in this report. While some of these will resonate more powerfully in some destinations or source markets, we believe there is much to learn from listening to those who guide the majority of international students on their overseas study journeys.

These key areas are:

1. Traditional Destination Flux – Varying Degrees of Positive Agent Sentiment for Australia, Canada, the United Kingdom and the United States;
2. The rising importance of affordability in student decision making;
3. The emerging popularity of alternative destination countries – with European and Asian destinations capturing greater interest;
4. Students are applying to more universities and destinations, supported by globally-focused student counselling services. One in ten agents now send to 100 institutions or more;
5. The majority of agencies counsel students towards multiple destinations – there are comparatively few single destination specialists;
6. Agents, sometimes against their own better judgement, rely on rankings as a proxy for quality with a preference amongst agents for Global Rankings lists – and QS increasingly prevalent;
7. Service and especially timely responses to enquiries and applications continue to dominate the most important factors for a productive relationship with institutional partners;
8. Training and Accreditation – we explore the extent to which agents are receiving training and accreditation as the global sector embraces more regulation.

1. A sentimental journey: Cyclical fluctuation in attractiveness of main English-speaking markets

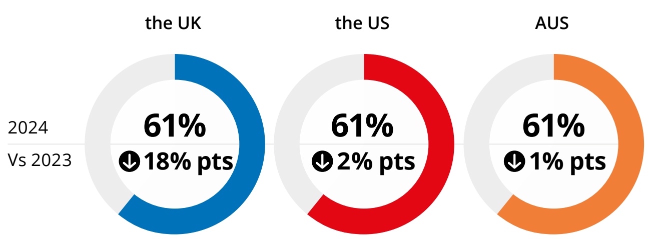
Agent sentiment towards the main destination markets of Australia, Canada, the United Kingdom and the United States has been a staple question of our annual agent survey. We ask agents whether they feel they will send more, the same or fewer students to given destinations. This is based on agent intuition and sentiment at a given point in time - not a scientific forecast. Nevertheless it is interesting to note a number of themes.

While our agents communicated broadly robust demand sentiment for all destinations, it is perhaps more meaningful when we consider how that sentiment has shifted over recent years. There are some noticeable variations.

- **United States:** From a low of 38% of agents intending to send more in 2021 (peak COVID), sentiment has increased to 61% in the 2024 survey. Most of the uptick is driven by agents based in South Asia, Europe, the Middle East and Africa. The exponential growth in enrollments from South Asia – especially for STEM designated Masters programs and the potential for two years extension of post study work through OPT (helping to defray the initial cost of the education) resonates powerfully with global agent networks.
- **Australia:** Sentiment for Australia hit a low point in 2021 – unsurprising given the country was completely closed due to COVID restrictions. That it has bounced back as powerfully as it has surprised many commentators. Certainly the continued positive agent sentiment across China is good news for Australian higher education – especially those appearing in the QS World Top 100 rankings. South Asian growth sentiment is however significantly lower this year.
- **United Kingdom:** Positive sentiment for the UK surged during COVID due to introduction of the Graduate Route visa and the fact the UK was relatively more accessible to international students at the outset of pandemic. While there is still positivity towards growth, it has noticeably diminished relative to other study destinations and is weaker now than in the prior three years. The UUK's new We Are International campaign is a vital resource to remind the wider education counselling community that the UK provides a welcoming home, offering life-changing opportunities for students from across the world.

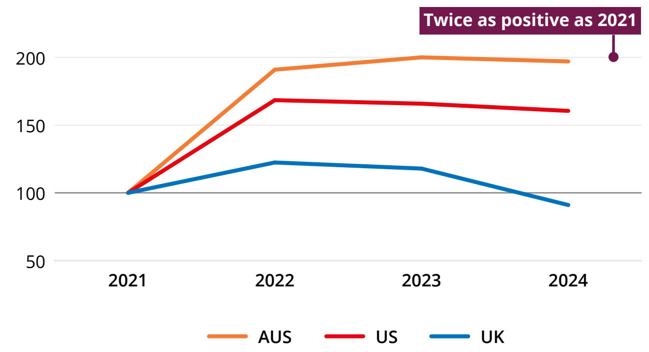
With so much competition for global talent, sentiment can be affected by factors outside institutional control. Anecdotes of Australian visas taking two months or more to process in Vietnam and the overflow of domestic election posturing into global markets all have an impact on sentiment. But it is rarely fatal. Global demand is resilient and students are savvy - although we all need to work hard to maintain our attractiveness.

Agents expecting to send more students in the coming year to...



Source: INTO Global Agent Survey 2024

Change in agent growth sentiment towards key destination markets (indexed vs 2021 survey)



Source: INTO Global Agent Survey 2024

2. Affordability crunch: The growing financial burden on students and their families

Cost of living challenges are impacting families across the globe, with higher prices and inflation squeezing disposable income and savings. Many currencies have lost purchasing power in the last year and, in a few cases, there have been some extreme devaluations (e.g. Nigeria, Turkey, Egypt). Coupled with increasing tuition prices and accommodation, the cost of studying abroad has become considerably more expensive for many.

Policy discussions that simply assume ranking or prestige of a university is the best indicator of quality of incoming international students significantly overlook the fact that affordability is a major barrier for students.

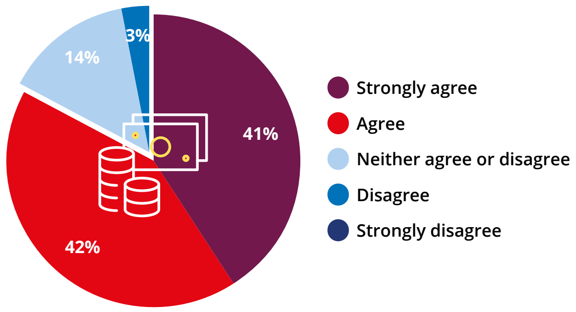
> *"Providing robust career services, internship opportunities, and networking resources can enhance students' employability and career prospects post-graduation. Sharing data on alumni outcomes, industry partnerships, and career development programs can reassure students of the institution's focus on preparing them for successful careers."*
>
> **Agent, Saudi Arabia**

Over 80% of our agents agreed that study abroad discussions are becoming increasingly focused on cost. Agents in Africa (96%), South Asia (90%) and Europe & Central Asian (90%) regions were most in agreement with this sentiment.

Even in countries like China, which have historically been perceived as having greater price insensitivity and much less reliance on scholarships, 78% of agents felt cost was increasingly a factor in decision-making.

Our recent survey of incoming students (late 2023) identified that understanding complete cost of studying abroad is seen as one of the major pain points for individuals. Clarity over the cost of studying abroad needs to be simply presented, with agents making specific reference to better information about access to scholarships, affordable accommodation and general cost of living. Employment opportunities are also important for a better understanding of return on investment.

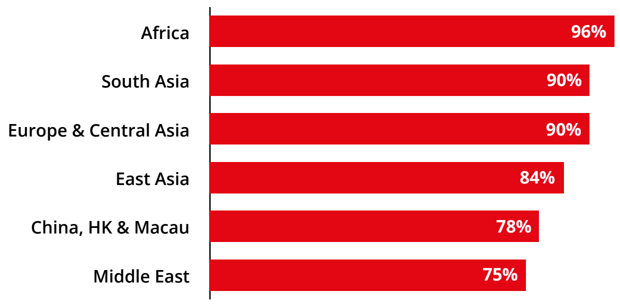
83% of agents agree cost is an increasingly important factor in study abroad decision making



Source: INTO Global Agent Survey 2024

INTO

Regional profile of agents agreeing that study abroad decisions are increasingly focused on cost



Source: INTO Global Agent Survey 2024

INTO

> *"For some families, the cost-effectiveness (input and output) of studying abroad is increasingly important."*
>
> **Agent, Mainland China**

3. Borderless ambition: Students target diverse global destinations

Findings of the survey highlight the increasing attractiveness of destinations outside the 'Big Four' English-speaking destinations of Australia, Canada UK and USA. In particular, our research indicates some key regional pivots in demand.

Europe was most frequently cited as an emerging study destination by agents from South Asia and Middle East & Africa regions, with destinations such as Germany and Ireland mentioned the most frequently, and cost and access to post-study work opportunities key influencing factors.

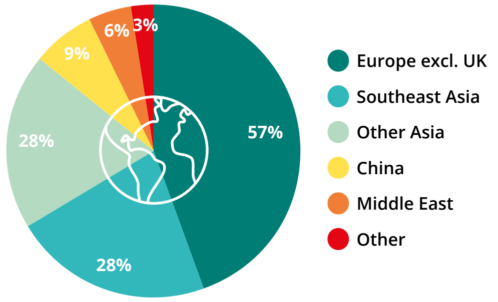
Chinese agents noted significantly more interest in other Asian destinations (particularly in Southeast Asia), with rising interest in international schooling options, more localized pathway provision and a heightened sense of priority given to geographic and cultural proximity. East Asian agents also emphasized increasing interest in study abroad options within their region, as well as China.

These findings suggest that there are significant opportunities for future growth in transnational educational arrangements, as well as the importance of understanding how a university's proposition is being understood in a broader global context.

> *"There have been more inquiries in Singapore in the past two years, mainly because it is cost-effective and close to home."*
>
> **Agent, Mainland China**

> *"Parents want to find schools with low fees and high rankings that are close to home."*
>
> **Agent, Hong Kong**

Europe and East Asia leading the pack: Which emerging regions are agents counselling students towards?



Source: INTO Global Agent Survey 2024

INTO

> *"Because [Europe is] more affordable they are ready to take risks regarding post-study work. The schools teach Spanish, German, and many more as a second language."*
>
> **Agent, United Arab Emirates**

4. Calling all frequencies: More destinations, more institutions, more noise

Uncertainty coupled with the rising attractiveness of a broad range of study abroad destinations is encouraging students to apply to increasing number of options – both destination markets and number of institutions.

This finding is consistent with other surveys (such as those produced by Navitas, and China Institute of College Admission Counseling) and confirms anecdotal feedback that students are increasingly hedging bets, and leveraging their options to secure the best deal (with increasing propensity to work with multiple agents).

There are some strong incentives for students to do this at present. In some countries limited availability of visa appointments, or large delays to visa decisions, coupled with lack of clarity about evolving landscape, increase the reasons for needing a good back-up plan should their preferred destination become less desirable, or accessible.

11%

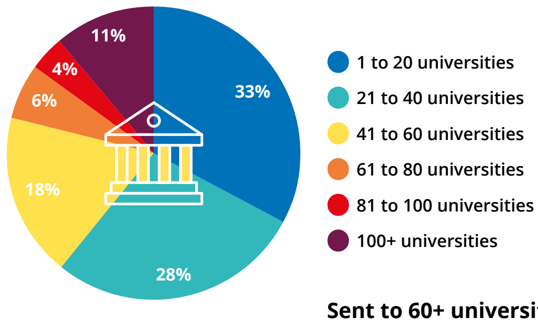
OF OUR AGENTS SUBMITTED APPLICATIONS TO OVER 100 UNIVERSITIES LAST YEAR

The complex and competitive global market for international students is highlighted by the fact many of our partner agents are counselling students towards a highly diverse range of options. 11% of our agents submitted applications to over 100 universities last year. Over a quarter of agents in several regions also reported they had supported applications to over 60 different institutions. It is a crowded landscape and the challenge of standing out becomes ever more difficult.

The increasing number of applications per student is effectively creating more noise in the system, which has placed much pressure on universities to effectively resource admissions and will ultimately result in lower rates of conversion and enrolment.

We believe that in 2024 this will likely impact on the timing of when students commit to study abroad decisions, both in terms of confirming places (and completing a financial deposit), or if primary choice remains uncertain, potentially opting to defer enrolment until greater clarity is available.

Agent profile for number of universities they supported applications to in prior year

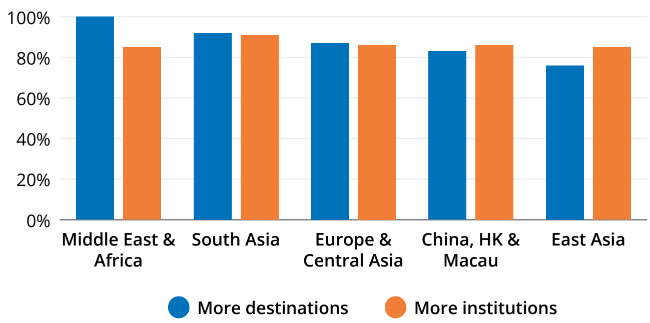


Sent to 60+ universities

China, HK & Macau	26%
East Asia	10%
Europe & Central Asia	14%
Middle East & Africa	24%
South Asia	25%
Americas	20%

Source: INTO Global Agent Survey 2024

Almost 9 in 10 agents agree in the past year students have applied to more destinations and institutions



Source: INTO Global Agent Survey 2024

5. Expanding horizons: Student counselling moves beyond single-market focus

The vast majority of those counselling students are not destination specialists, with 78% stating they'd recruited students to more than one destination in the prior 12 months, with 34% placing students at institutions across all of the 'big-four' countries (US, UK, Australia and Canada).

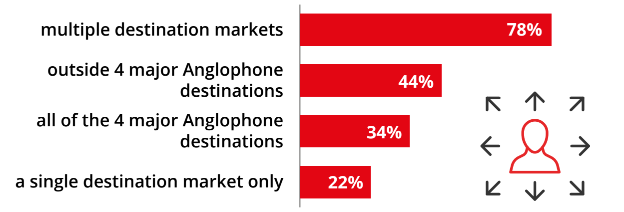
Whilst some larger recruitment partners exhibited much higher rates of in-house destination specialism, the prevalence of counselling across multiple jurisdictions is reflective of service offerings expanding to accommodate broader student demand.

Smaller study abroad agencies [who have become an increasingly prevalent part of the study abroad eco-system due to rise of agency aggregators, sub-contracting and market deregulation (e.g. in China)] exhibit a higher prevalence of destination generalism.

In this global, highly competitive and increasingly crowded landscape, it is essential that universities and colleges can find ways to clearly communicate their proposition in order to stand out and be positioned effectively relative to a global range of options.

This also raises questions on the quality of training and support agents receive – a point we discuss more in Section 8 of this report.

During last year surveyed counsellors placed students in...



Source: INTO Global Agent Survey 2024

INTO

> *"It is very important to lead students into good academic performance. Good news from students who we sent out will be made as good sources and information for future students."*
>
> **Agent, South Korea**

> *"Highlight [your] unique selling point (can be the course, can be the unique teaching method, etc) of the universities as [most] now have almost every course available."*

6. In search of quality: How rankings steer student and agent decisions

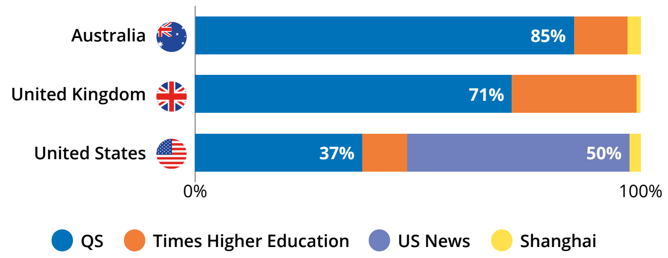
Student research regularly emphasizes how students use proxy measures for quality of institution and employment prospects, to assess choice and potential return on investment. In turn, agents rely heavily on rankings – especially in some markets like China.

Whilst there is much debate on the merits and limitations of university rankings, it is important to note their use extends beyond study abroad counselling. They have also become instruments of some national policies.

For example, in China graduation from a top-ranked global university, (usually top 100 in the world) confers some flexibility to those seeking to switch coveted Hukou (residential) status to Shanghai and Beijing, which are seeking to attract talent – with implications on access to housing, social welfare and employment opportunities. Meanwhile, some large sponsoring bodies (such as in Middle East) design scholarship programs influenced by global rankings. Immigration policies are also being shaped (such as in UK) by institutional ranking segments, even whilst acknowledging this is not an ideal way to assess quality of provision or student body.

Coupled with these market drivers, rankings are also a readily available and simple means of directly comparing universities, in the absence of other global metrics. This becomes increasingly important when the range of choices considered by students and counsellors, cuts increasingly across jurisdictions.

Primary global ranking used to consult students on study abroad options in...



Source: INTO Global Agent Survey 2024

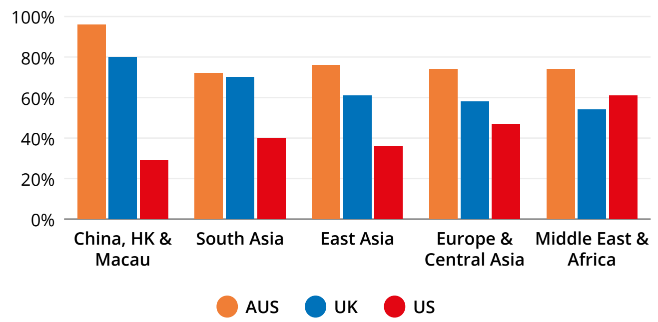
Our survey shows that, as has been anecdotally understood, our recruitment networks are increasingly relying on QS as their primary ranking tool for study abroad counselling.

Whilst US News is still the most prevalent ranking primarily used in consideration of US higher education decision making (50% overall – and 67% in China), QS was by far the most cited by agents recruiting to both Australia (85%) and UK (71%).

This is important as the differing methodologies employed by rankings organizations place a different emphasis on input variables and create differing peer profiles.

This is not an endorsement of the continued importance placed on rankings. Other important factors rightly play a major determining factor, such as perceived employment-related outcomes (during and post-study), affordability, location and recommendation. These need to well articulated and communicated to facilitate a more holistic view that influences student choice.

Bias towards use of QS as primary global ranking



Source: INTO Global Agent Survey 2024

> *"I check a few of them for all institutions and I compare information from all, so the parents have a better idea. To check just one ranking is a terrible mistake."*
>
> **Agent, Brazil**

7. If you snooze, you lose: Service has never mattered more

If there is one theme and one frustration which has consistently dominated our agent survey satisfaction metrics for more than a decade, it is the importance attached to speed of response to applications and enquiries. Across every region of the world, it is institutions' ability to deliver on response times to enquiries and applications which tops the most important factors.

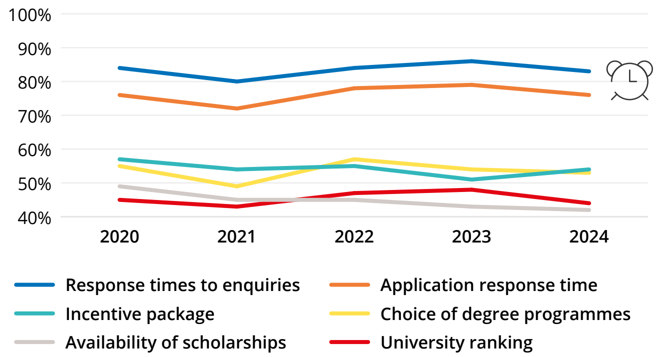
Edified have published research which flagged that across the sector 1 in 4 enquiries went unanswered. In fact, in a mystery shopping exercise an agency, AECC, outperformed 75% of the UK sector when it came to response times. It is staggering that, as a community this is still such an enduring source of frustration.

There are many areas beyond the control of institutional international offices – migration policy, rankings, location and more. But service standards are not. Service response times stand out from the crowd in terms of importance to agents. It seems reasonable to conclude that delivering on these will enable institutions to stand out also. That does not mean that outcomes, student experience, employability don't count. They do. But, if there is one area to focus limited resource, service standards feel like a great place to start.

Here at INTO, this has been a key focus of our work for partners. We have experienced the pain of application overloads in the past. So, we have focused on building larger, more broadly distributed teams and on deploying much greater levels of Artificial Intelligence to admissions processes in order to drive efficiency and improve yields.

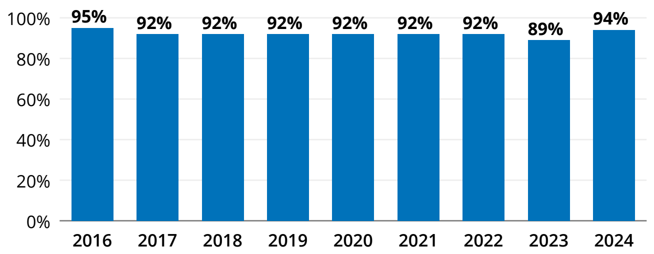
We are therefore delighted that in 2024 our recruitment partners gave us our highest recorded level of service satisfaction score (94%) in almost a decade.

Factors cited as very important by agents



Source: INTO Global Agent Survey 2024

Satisfied/very satisfied with overall support provided by INTO



Source: INTO Global Agent Survey 2024

"We will strongly promote any university where agent support and customer service is amazing. Successful schools develop a relationship with the agent and maintain this relationship through training, Fam[ilariasation] trips, and having one main point of contact."

Agent Latin America

8. A global maze: Navigating training and accreditation for education agents

This year, we asked our recruitment partners about the extent to which they have received training or certification for student counselling towards the destinations they represent. Agent training and regulation has taken increasing prominence over the past few years. The AIRC in North America, the legislative approach in Australia, the introduction by ICEF of its Global Accreditation and, more recently the UK's Agent Quality Framework, are all designed to promote good practice.

Much of the recent conversation on agent regulation and certification has been to ensure consistently higher standards across the sector. This is a laudable aim and one which no-one in the sector could disagree with.

However, the proliferation of choice and the imperative for many agencies, especially small and medium sized enterprises to become multi-destination specialists means they need more support than ever.

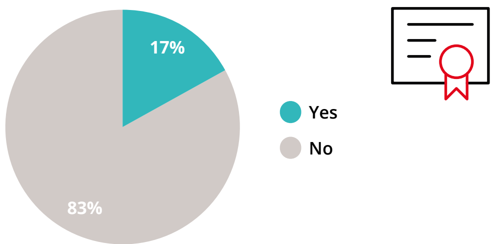
Key Observations

- The rise of global certification – one in four of the respondents indicated they had participated in ICEF's agent certification programme.
- Of those sending to the UK, 79% of respondents indicated they had received some form of training from the British Council. This augurs well for the roll out of the AQF – and the British Council's lead role in its promotion and adoption.
- By contrast, only 17% of those sending to the United States indicated they have received training or certification. Of course this may simply indicate the AIRC is a more complex and expensive certification process more appropriate for larger, better funded operations.

Agents also made reference to a large number of other training and certification programmes they've completed from a diverse range of sector organisations, including national accrediting bodies, rankings organisations, internal company training schemes and a variety of specific universities.

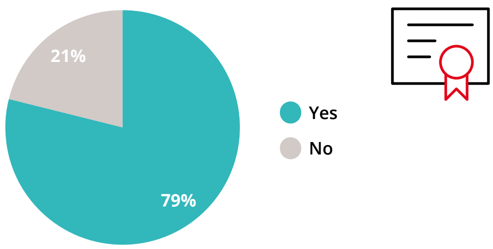
At INTO, we have completely revamped our agent training and support programs, designing them to align with and exceed the expectations of the major agency quality frameworks. These include online micro-credentialling, mandatory destination market training, compliance and more.

Percentage of agents who enrolled students in USA who have AIRC training/certification



Source: INTO Global Agent Survey 2024

Percentage of agents who enrolled student in UK who have British Council training/certification



Source: INTO Global Agent Survey 2024

> *"Fast responses and actions to all enquiries. A lot of training and information provided with the marketing support are also useful to grow the number together as well."*
>
> **Agent, Thailand**

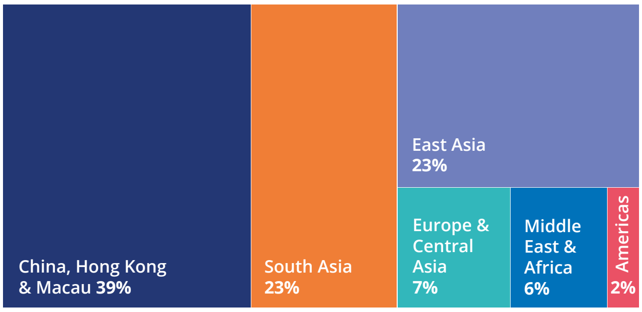
Survey respondent profile

The 2024 INTO Global Agent Survey was distributed in March 2024 and received 1240 responses, from over 65 countries globally. Mainland China was the top responding location with 396 responses, followed by India (213), Indonesia (99), Hong Kong (83), and Pakistan (53).

The survey link was distributed by email and QR code to our agent partner network, with support provided locally by our regional teams to build awareness and encourage participation. The survey was up to 30 questions long and took around 15 minutes to complete in either English or Simplified Chinese.

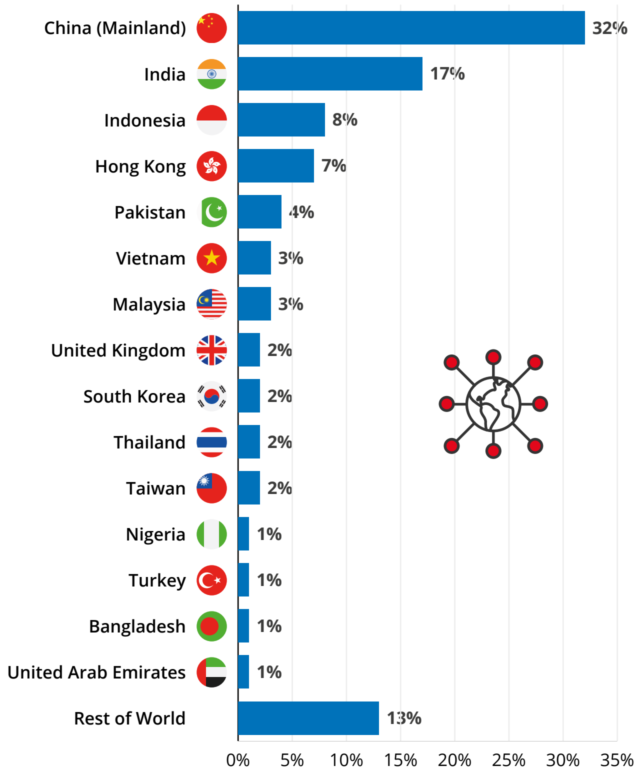
The strong response from our agent network is something we are hugely grateful to our partners for. Relationships with our recruitment partners are core to the success of our business, and we dedicate significant time and energy to supporting them and ensuring we listen and respond to their feedback.

Regional profile of survey respondents



Source: INTO Global Agent Survey 2024

Locations of survey respondents



Source: INTO Global Agent Survey 2024


IELTS

For more information visit intoglobal.com or contact us:

North America

INTO University Partnerships
8910 University Center Lane
Suite 400
San Diego, CA 92122
T: +1 858 356 4400

Europe, Middle East and Africa

INTO University Partnerships
One Gloucester Place
Brighton, East Sussex
BN1 4AA, United Kingdom
T: +44 (0)1273 665200

Asia

INTO University Partnerships
Unit 1007, 10/F
Wing On Kowloon Centre
345 Nathan Road
Jordan, Hong Kong
T: +852 2105 6800

Australia

INTO Australia
Level 29, Central Park Tower
152-158 St Georges Terrace
Perth WA 6000

@INTOglobal

www.linkedin.com/company/into-university-partnerships

INTO