

# Agents for Change

Global Perspectives on Shifting Agent Perceptions in 2024

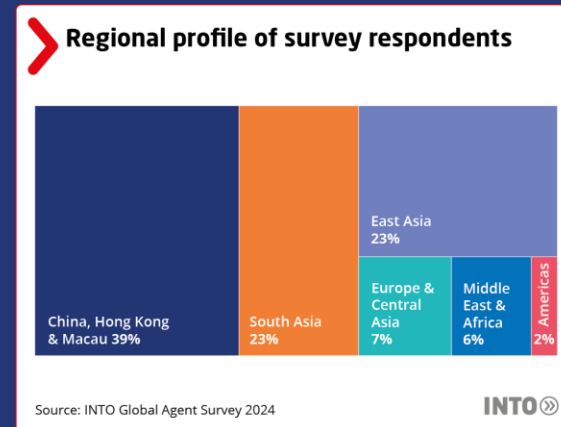
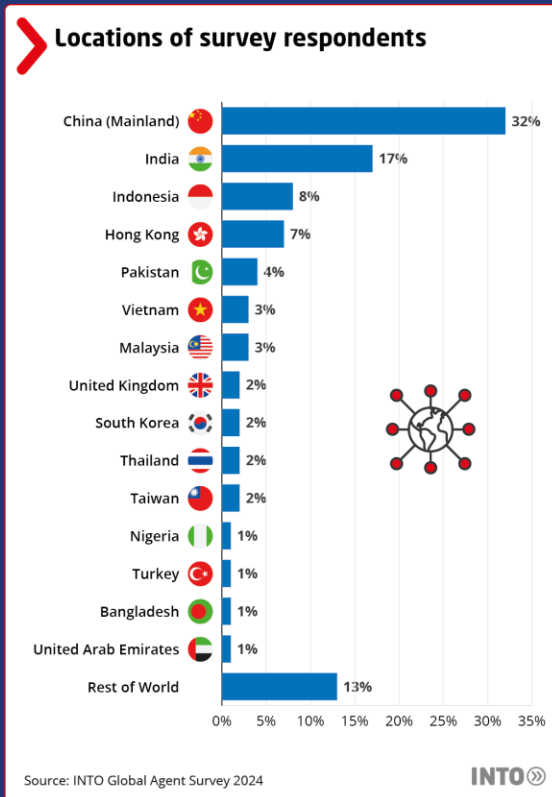
AIEC Conference  
Melbourne, Australia  
October 2024



**INTO** 

# About this survey

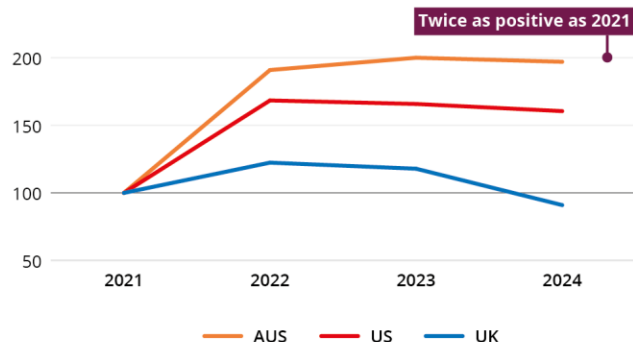
- › 1200+ responses
- › 52 countries – reflecting Australia and the world's largest source markets
- › Running for 15 years
- › Including the full spectrum of representation – from aggregator to sub-agent
- › Survey ran in February 2024



- › [Download the full report](#)
- › <https://www.intoglobal.com/media/0vtmkjwd/education-agent-survey-report-2024.pdf>

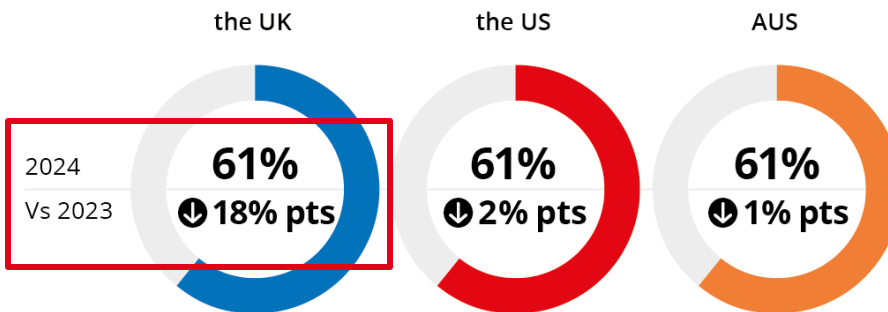
# Policy matters: Noticeable dip in positive sentiment for the UK in Feb 2024

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



Source: INTO Global Agent Survey 2024

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



Source: INTO Global Agent Survey 2024

Dip in UK sentiment coincided with migration debate and announcement of withdrawal of dependent visas.



# **Student mobility has many drivers**

Destination policy uncertainty  
on migration is only one of  
them

# This agent survey points to drivers which affect all markets seeking to attract global talent

Affordability  
&  
Return on Investment

Improved perception of  
quality via global  
rankings

Enhanced access to work  
/ post-study work rights

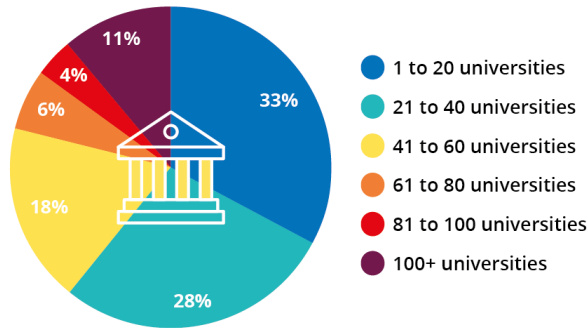
Geographic and cultural  
proximity

Greater options locally via  
TNE to 'big 4' brands

Increasing prominence of  
non-traditional  
destination marketing

# Calling All Frequencies: Noticeably more noise in the system

## 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

More applications

More destinations

Delayed decisions

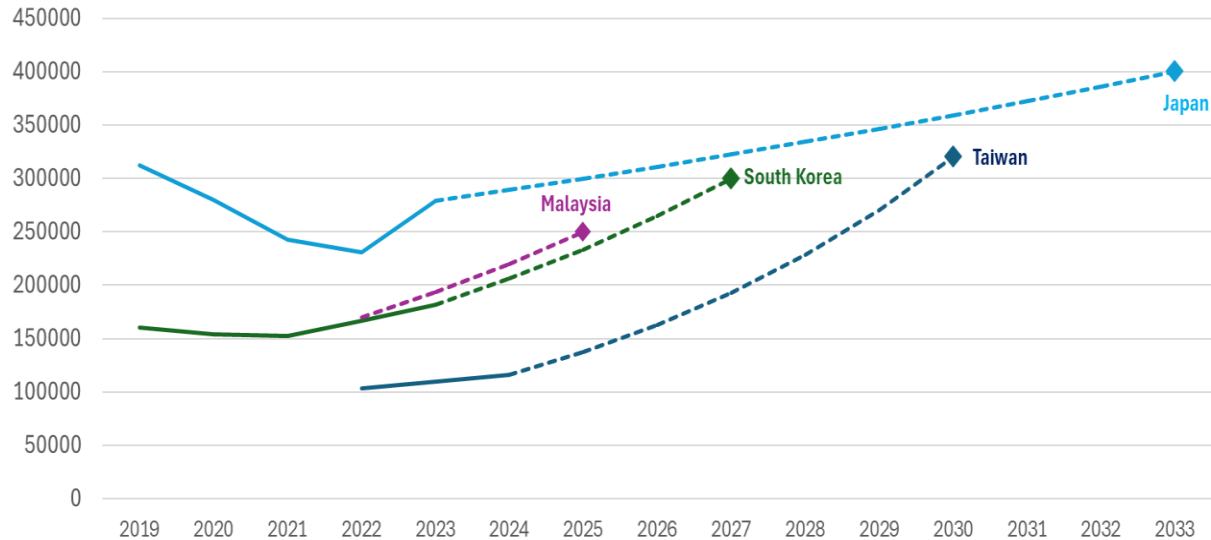
Pressure on conversion

Millennial parents and  
GenZ/GenAlpha students

Major Asian destinations already flexing their influence – and it is growing. Fast.



## Four countries alone targeting 1M+ foreign students

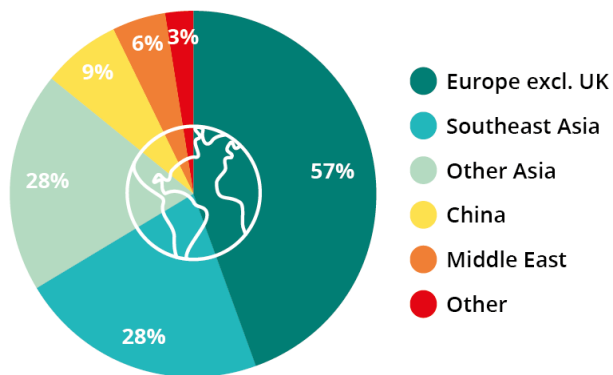


“Now is the time to attract foreign talent strategically”

Lee Ju-ho,  
South Korean  
Deputy Prime Minister &  
Education Minister, 2023

# Borderless ambition: Students increasingly applying to multiple destinations

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



Source: INTO Global Agent Survey 2024

- › Growth of intra-regional mobility
- › Driven by cost, capacity and return on investment

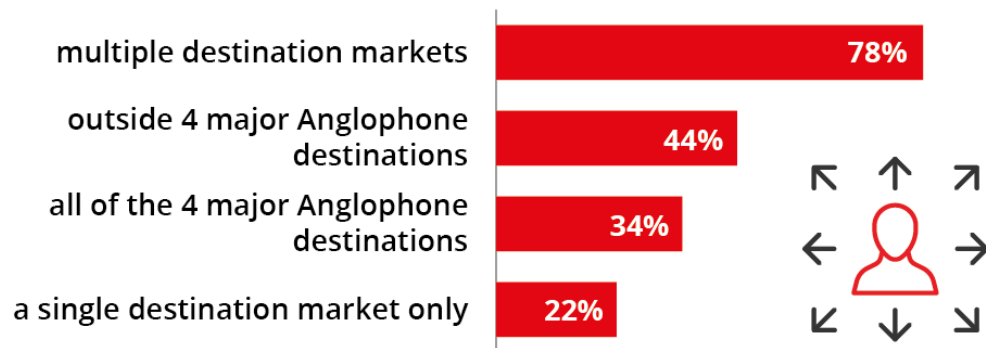
*“There have been more inquiries in Singapore in the past two years, mainly because it is cost-effective and close to home.”*

**Agent**  
Mainland China



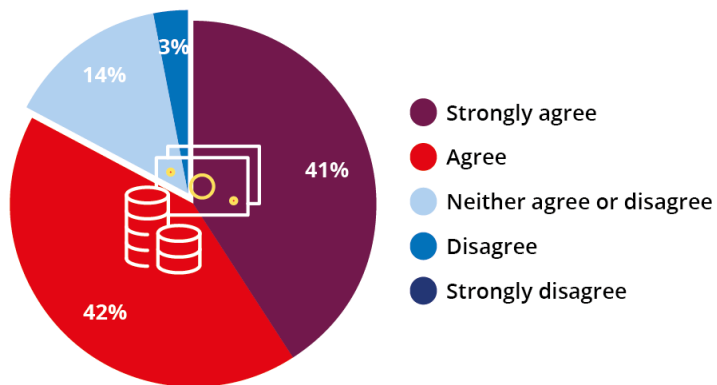
# Which means agents are increasingly generalists

## > During last year surveyed counsellors placed students in...



Source: INTO Global Agent Survey 2024

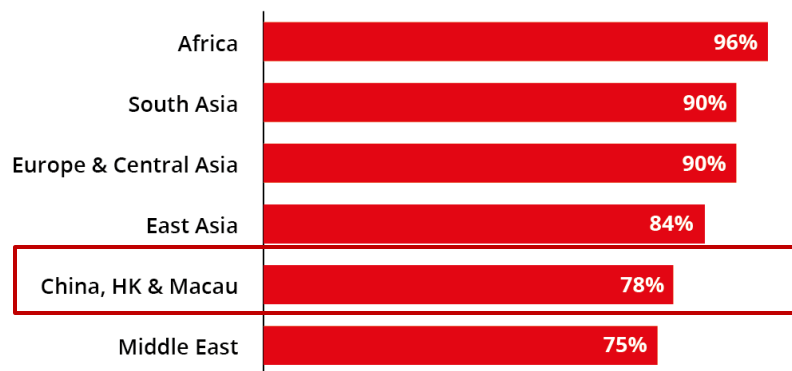
**> 83% of agents agree cost is an increasingly important factor in study abroad decision making**



Source: INTO Global Agent Survey 2024



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



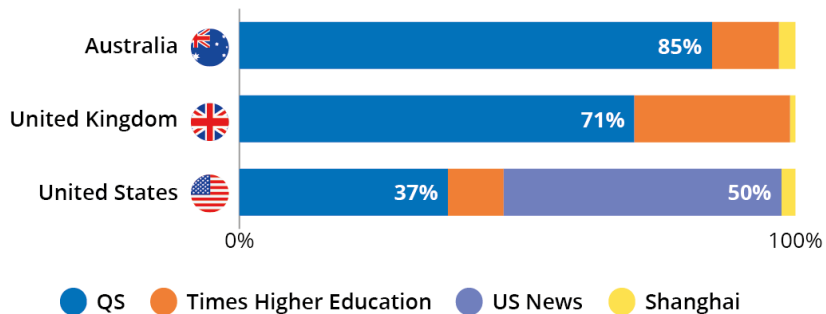
Source: INTO Global Agent Survey 2024



# Where rankings matter, QS is most important for Australia – but Asian universities are rising rapidly



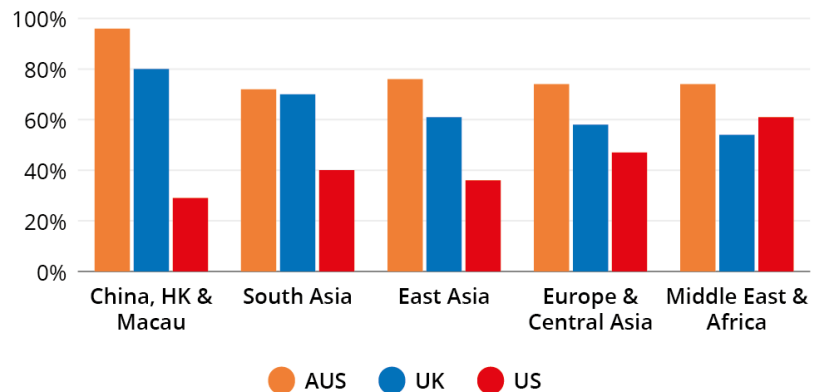
## Primary global ranking used to consult students on study abroad options in...



Source: INTO Global Agent Survey 2024



## Bias towards use of QS as primary global ranking



Source: INTO Global Agent Survey 2024

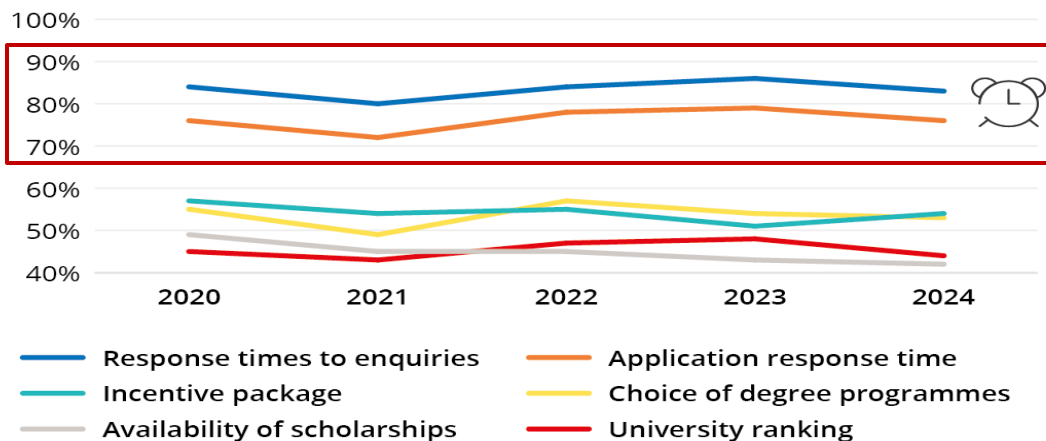


# “If you snooze you lose”

Despite influence of external factors, it is service standards which remain agents' consistently biggest pain points.



## Factors cited as very important by agents



Source: INTO Global Agent Survey 2024

## Good News??

Indicates the single most important factor affecting agent confidence is within your institution's control

- › Global student mobility is on the rise

## BUT:

- › Domestic migration policy **matters** – and what happens in Australia does travel. Quickly.
- › There are many other factors – and some of these are structural which may have even larger impact on demand

## A call for distinctiveness

- › How does your proposition align with student need and demand?
- › Modes of delivery – is now the time to deliver closer to market?
- › Embedding highest service standards
  - Market presence
  - Technology investment to support smoother admission
  - A laser focus on speed of response

**INTO** 

[intoglobal.com](https://intoglobal.com)