



Navitas Agent Perception Survey

Summary Report

Round 8 – May 2024



Message from the CEO

Dear partners,

I am pleased to share this preview report of our latest Agent Perception Survey with you. These results reflect the views of more than 1000 agents and provide valuable insights into the factors influencing perceptions of education destinations and the approach international students are taking as they weigh up options for their future.

This survey has come at a very challenging time for the international education sector as we respond to policy changes all around the world, but most notably in Australia, Canada and the UK. We welcome the intent of the majority of these policy changes and believe they will lead to more quality students and ultimately improved student experiences. However, there is no doubt that policy instability is causing widespread confusion in the market and enormous frustrations for our students, agents and university partners. The latest NAPS findings indicate a negative impact on the reputation of these established destinations and, perhaps unsurprisingly, increasing interest in other destinations such as Germany, Dubai and Singapore.

In addition to these challenges, we continue to see cost of living pressures influence student choices and for the first time, cost of study, is the number one factor driving student choice from all regions except South Asia (where it is #2) and ANZ. This is no doubt a reflection of the challenging economic times we live in.

For Navitas, to be able to understand these challenges in our major education destinations through an agent lens at this critical time is extremely valuable. We use these insights to advocate for the international higher education sector in important discussions with governments.

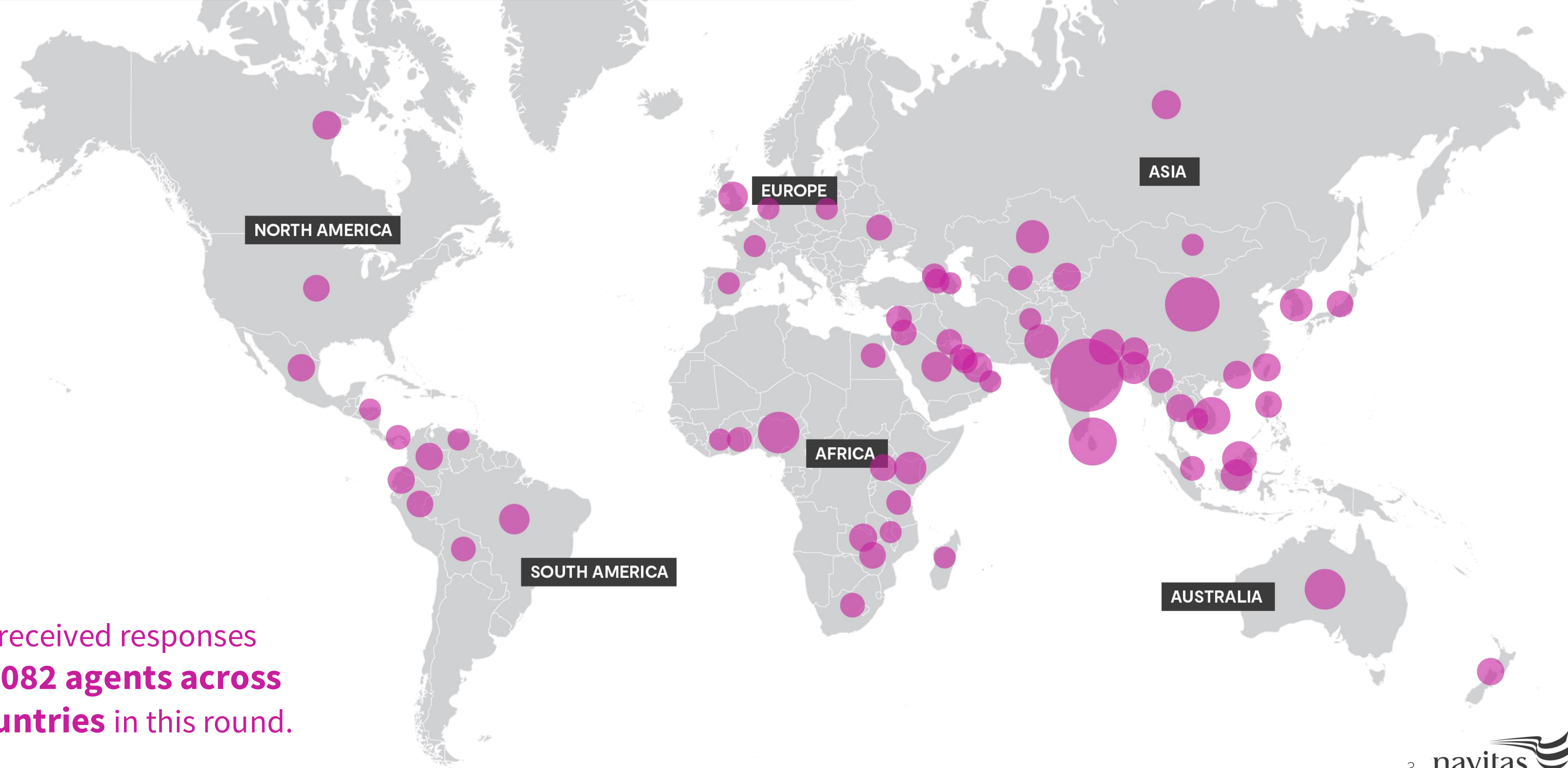
It is a privilege to share these insights with you.

Warm regards,

Scott Jones



We conducted the first Agent Perception survey at the beginning of the pandemic (May 2020) and are now at Round 8 (May 2024).

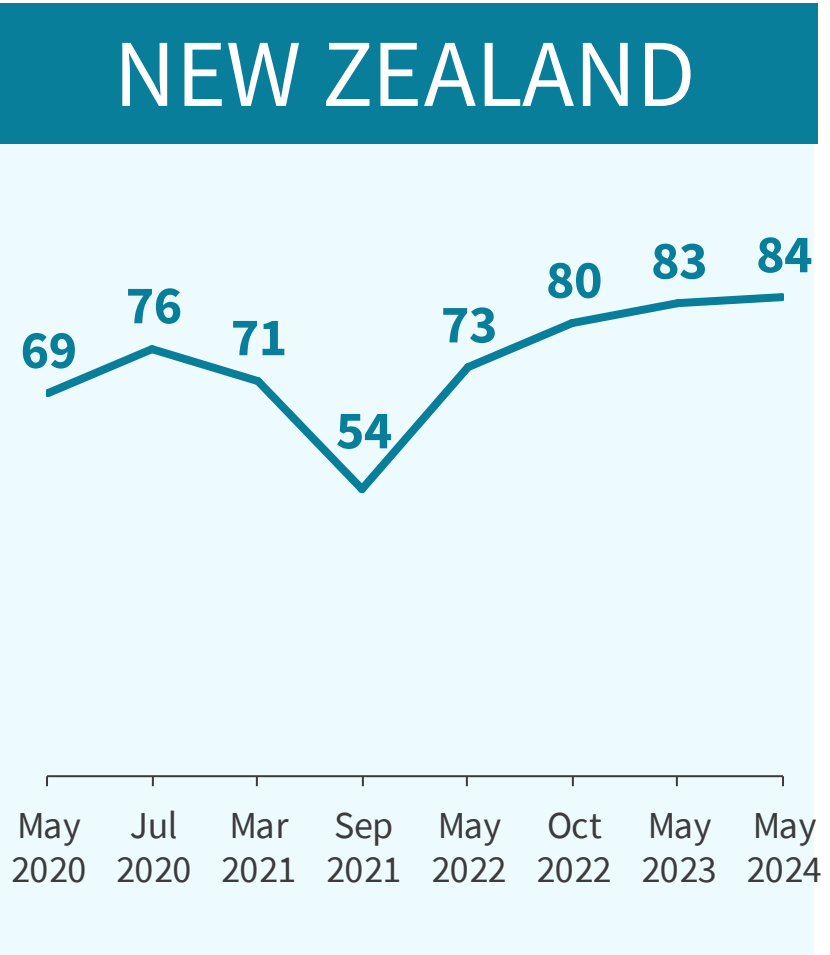
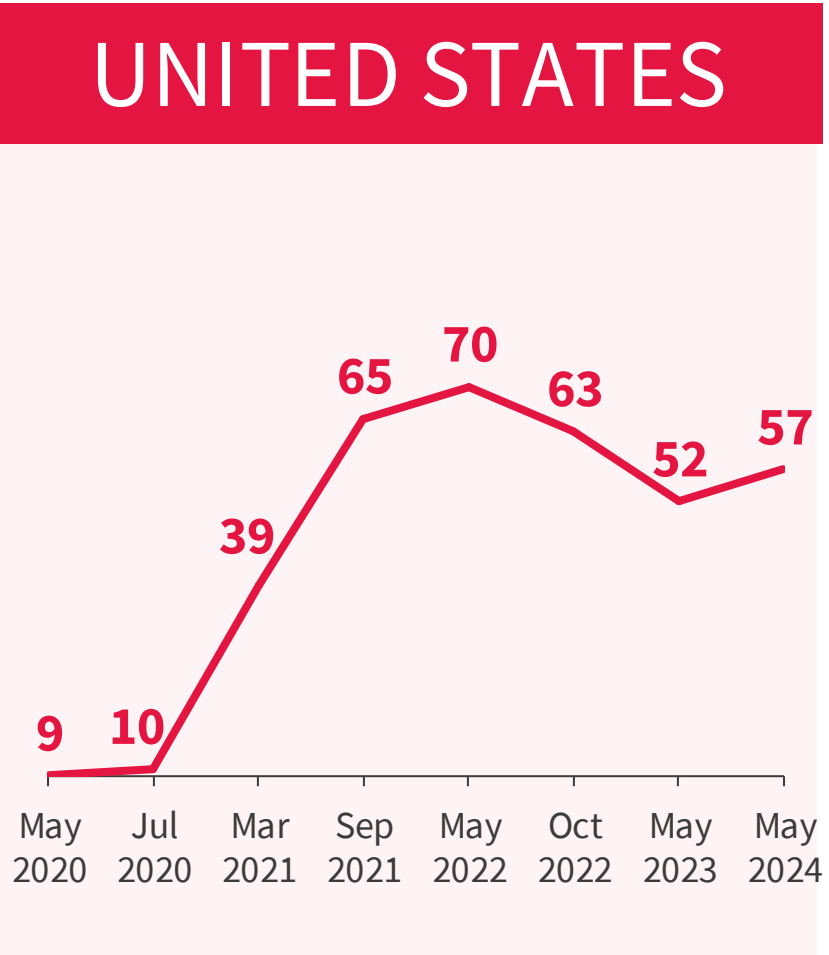
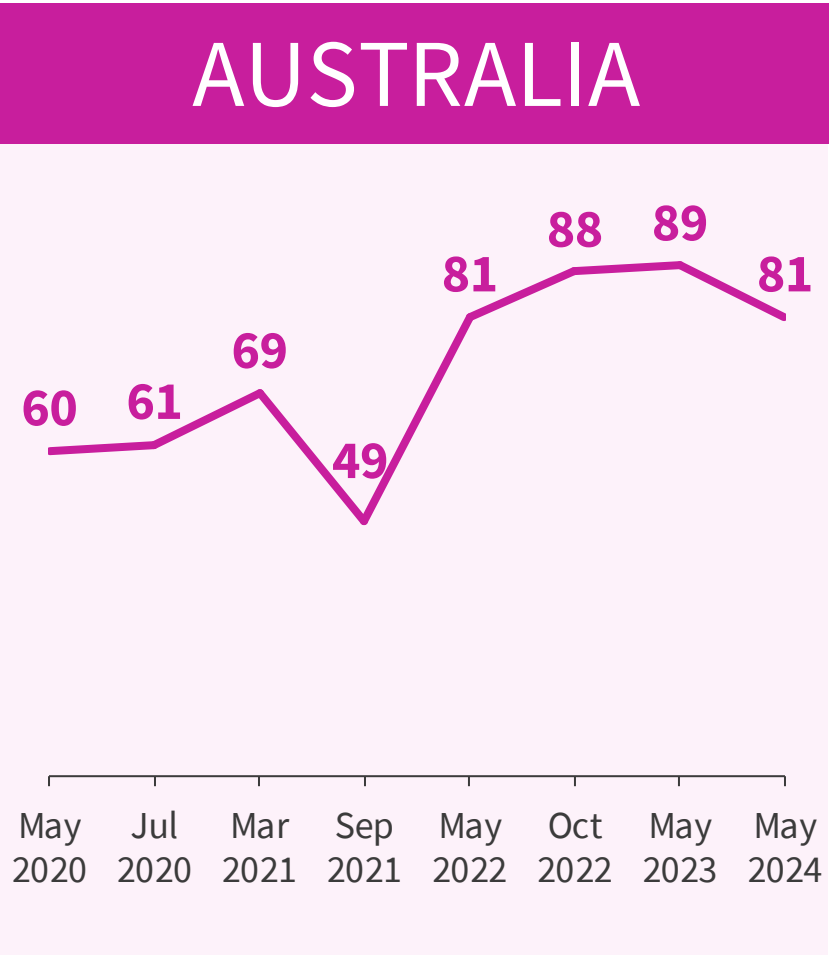


We've received responses from **1082 agents across 68 countries** in this round.

Canada's reputation as an education destination has declined sharply since it capped international student numbers. Australia and the UK are trending down.

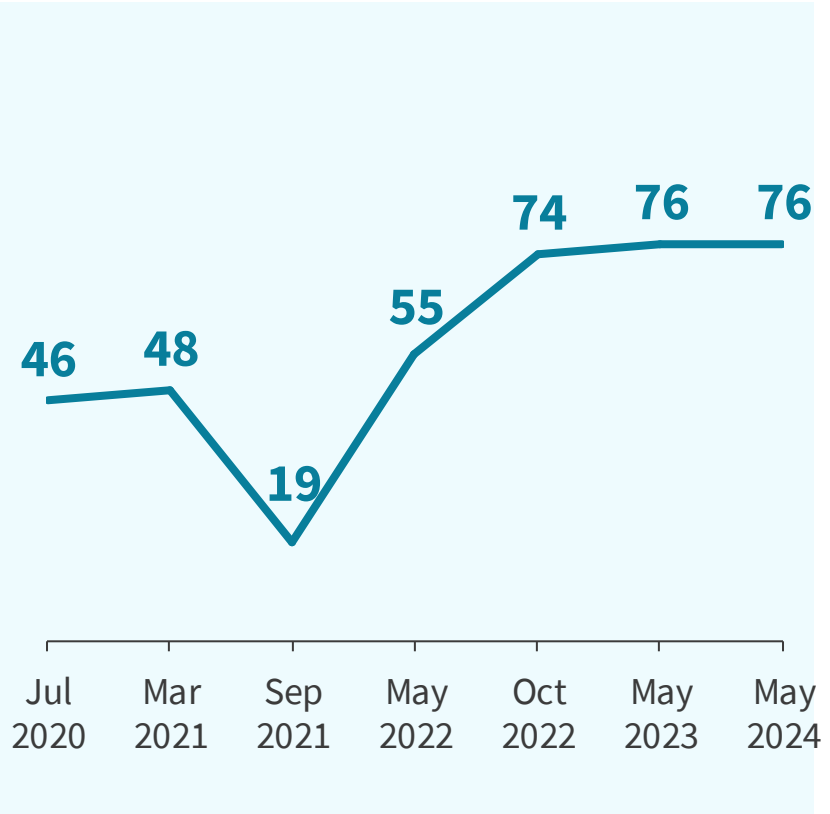
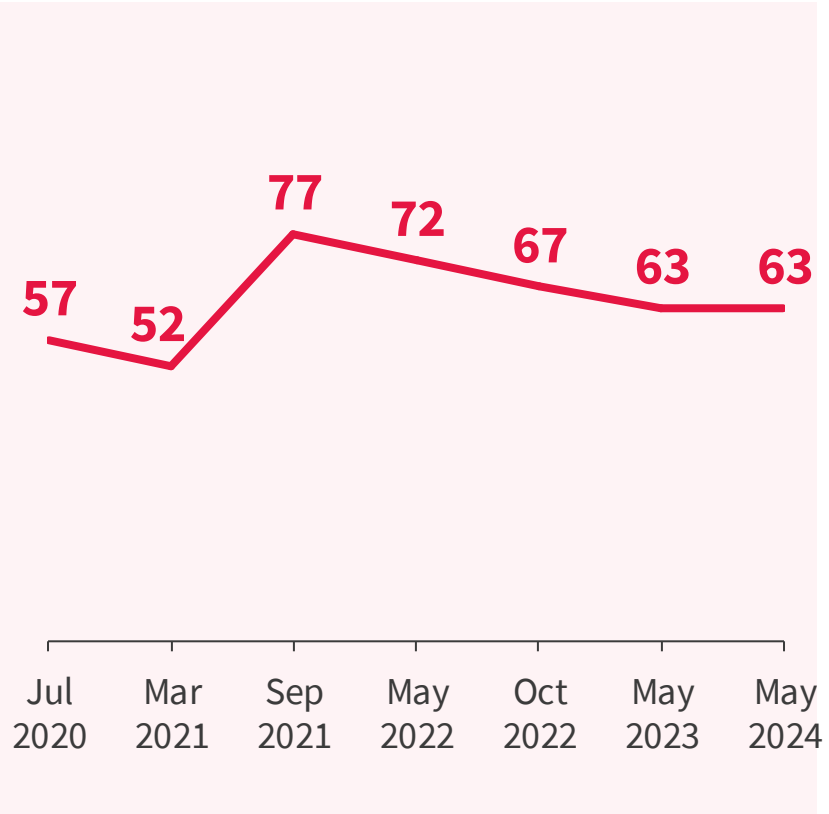
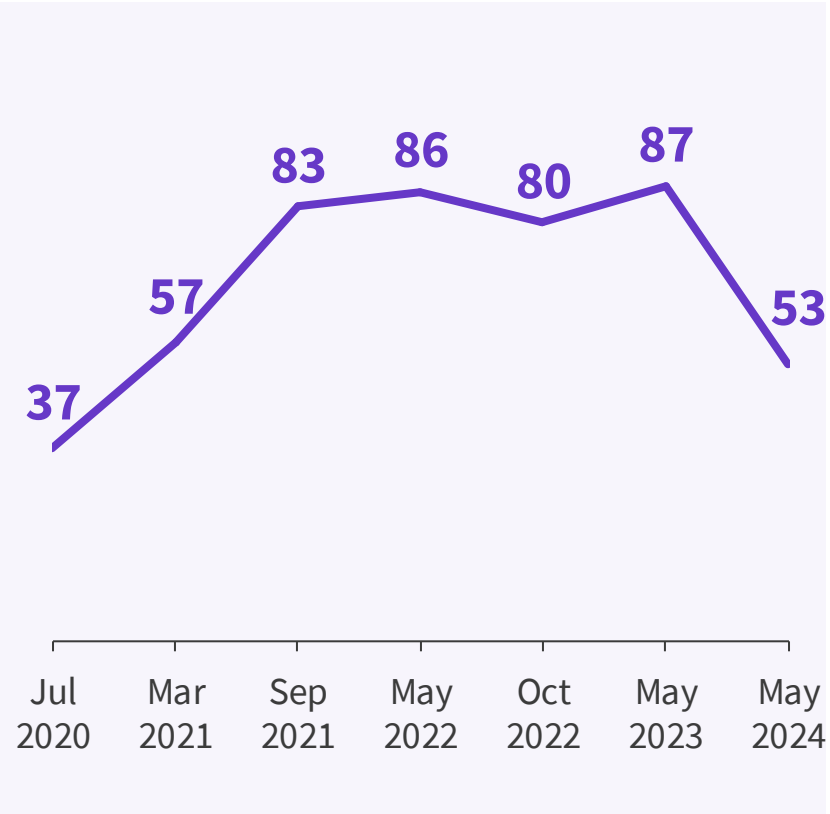
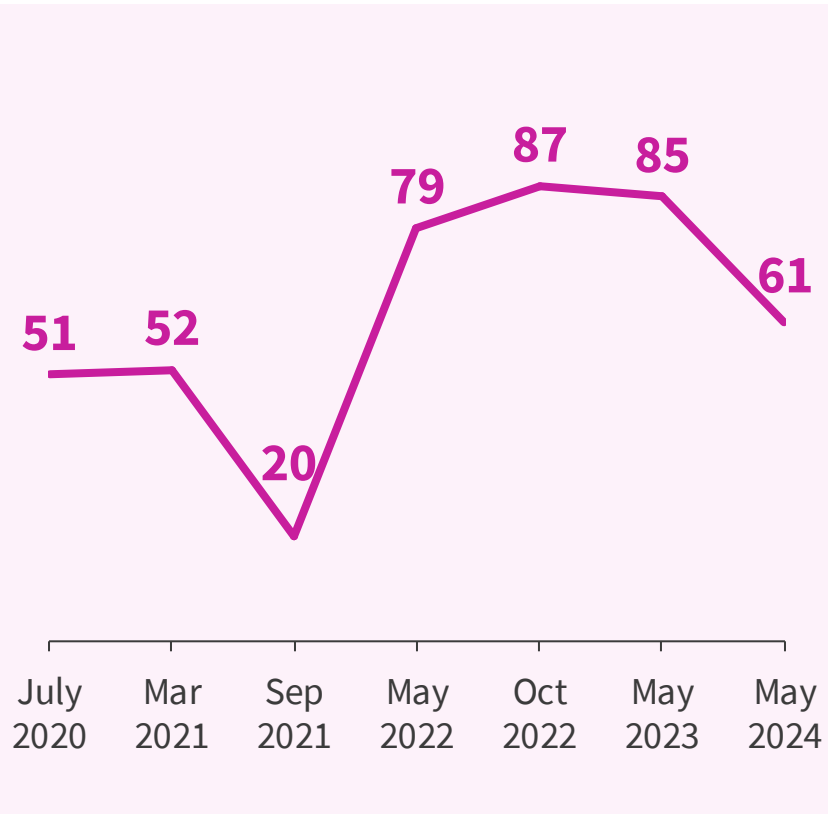
“Over the past two months, the reputation of this country as **safe and stable** for international students has improved”

% Responses “Strongly agree” and “Agree”



“Over the past two months, the reputation of this country as **open and welcoming** to international students has improved”

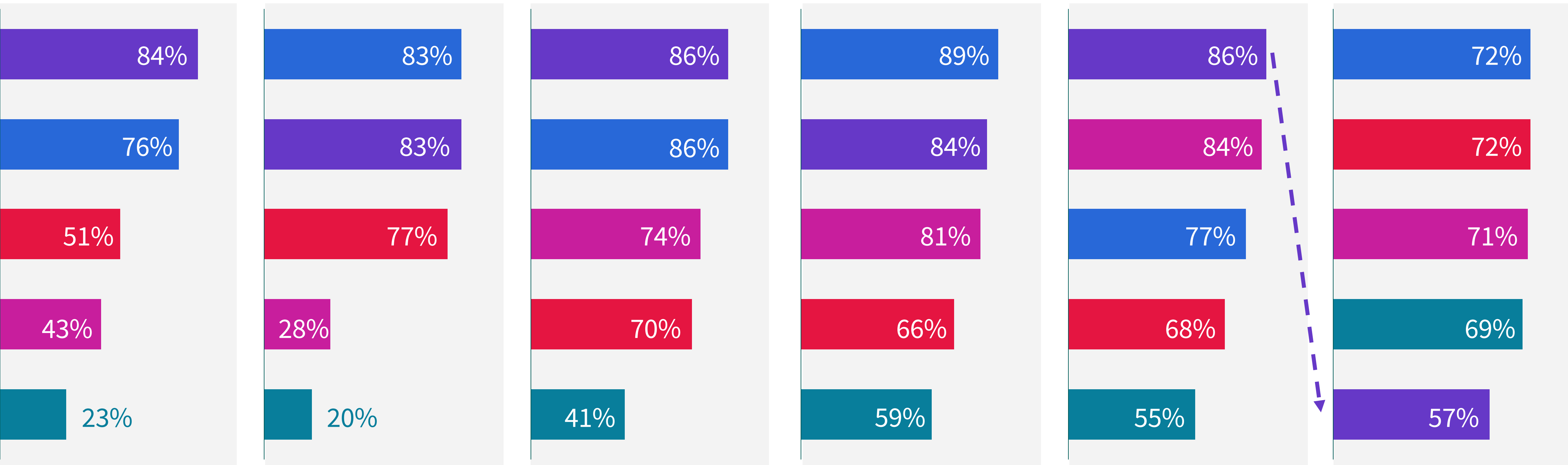
% Responses “Strongly agree” and “Agree”



Following four years of strong performance, interest in Canada has declined sharply. The other Major English-speaking destinations are closely competitive.

“Over the past two months, there has been more interest in this country as an education destination compared to other countries.”

% Responses “Strongly agree” and “Agree”



MAR 2021

OCT 2021

MAY 2022

OCT 2022

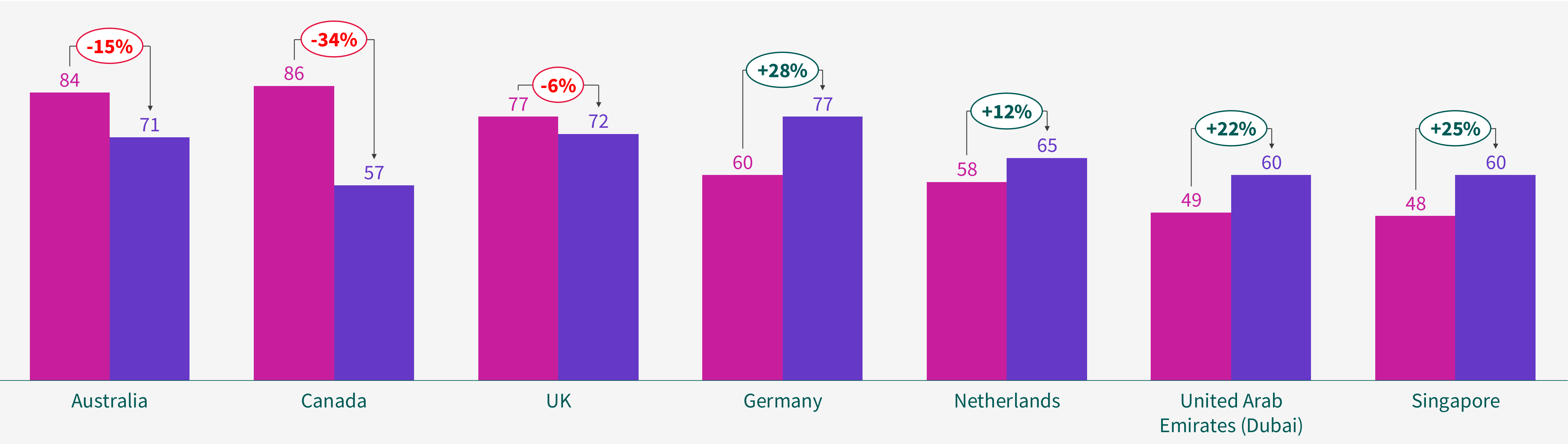
MAY 2023

MAY 2024

Decreased interest in the major English-speaking destinations has led to a spike in interest in other destinations like Germany, Singapore UAE and the Netherlands.

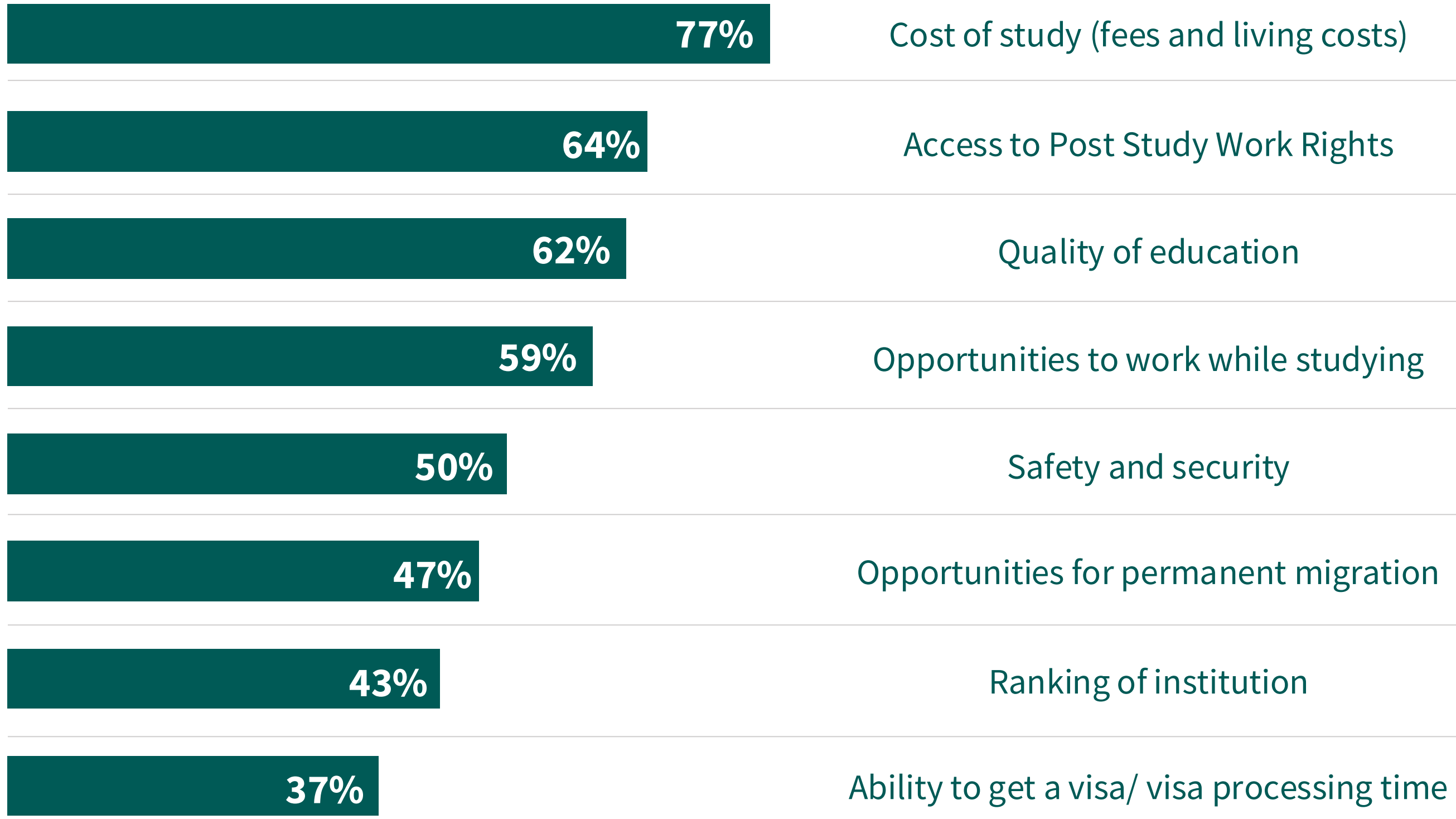
“Over the past two months, there has been more interest in this country as an education destination compared to other countries.”

% Responses “Strongly agree” and “Agree”

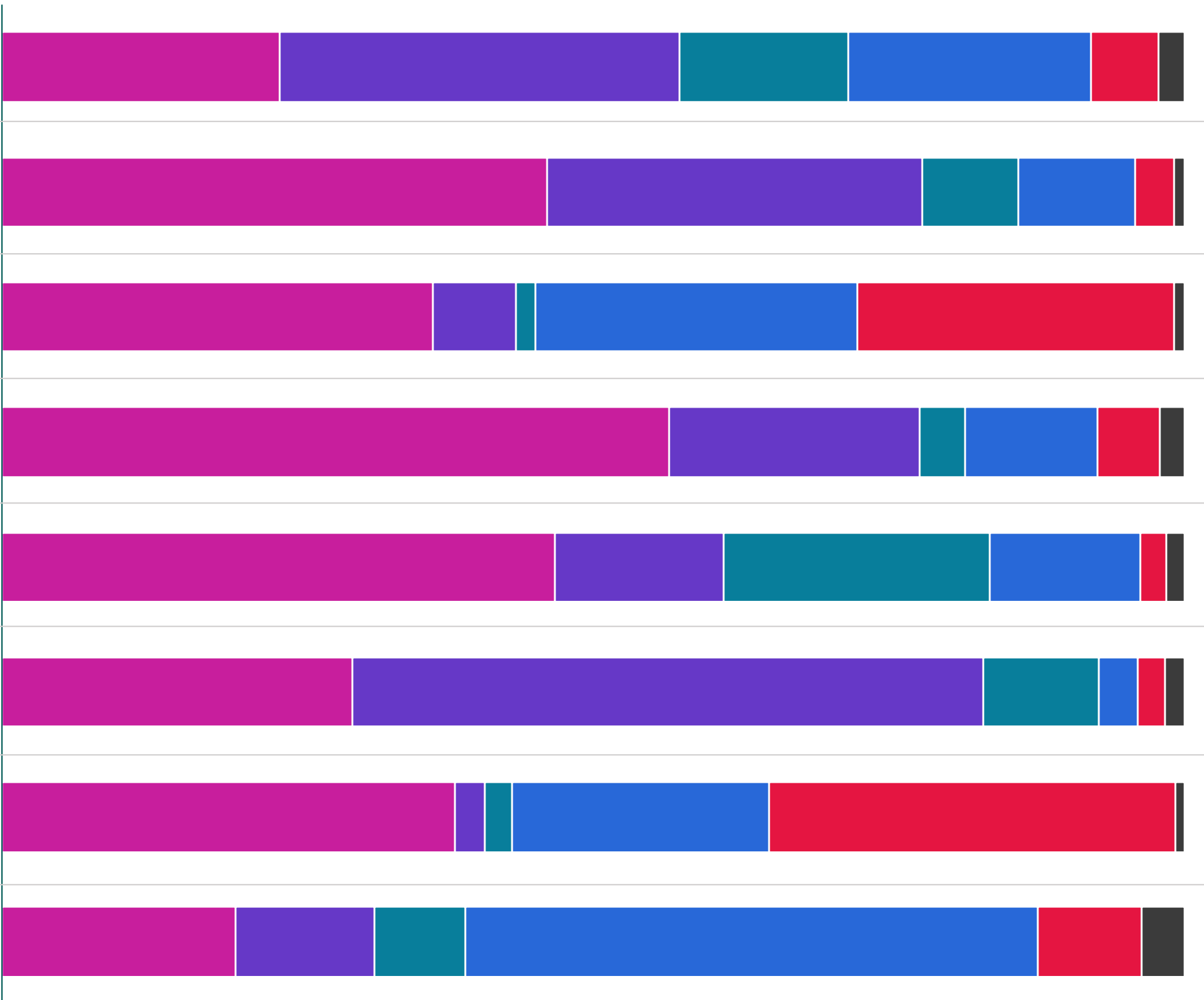


Cost of study and access to post-study work rights remain the two most cited factors influencing choice of destination. Australia, Canada, the UK, and the US continue to lead on various factors.

Q: What are currently the most important factors influencing student choice of study destination? **Top 8 factors**



Q: For each of the factors you selected in the previous question, which is the **most appealing destination?**



■ Australia
 ■ New Zealand
 ■ United States
■ Canada
 ■ United Kingdom
 ■ Don't Know

Each source region is driven by a unique set of destination choice factors. Cost is now the number one driver for almost all regions. Migration and employment factors dominate in South Asia, Africa and South East Asia.

Number of responses

Greater China

Cost of study (fees and living costs)	101
Ranking of institution	94
Safety and security	93
Quality of education	86
Opportunities for permanent migration	47

South East Asia

Cost of study (fees and living costs)	62
Access to post study work rights	46
Opportunities to work while studying	44
Quality of education	41
Opportunities for permanent migration	38

Central Asia

Cost of study (fees and living costs)	26
Safety and security	25
Quality of education	25
Access to post study work rights	22
Ability to get visa/visa processing time	15

ANZ

Safety and security	30
Quality of education	26
Access to post study work rights	23
Opportunities to work while studying	23
Opportunities for permanent migration	22

MENA

Cost of study (fees and living costs)	32
Safety and security	21
Ranking of institution	18
Access to post study work right	17
Quality of education	17

South Asia

Access to post study work right	330
Cost of study (fees and living costs)	324
Opportunities to work while studying	307
Quality of education	284
Opportunities for permanent migration	211
Safety and security	211

Sub-Saharan Africa

Cost of study (fees and living costs)	67
Access to post study work rights	66
Ability to get visa/visa processing time	55
Opportunities to work while studying	53
Opportunities for permanent migration	50

Europe

Cost of study (fees and living costs)	12
Access to post study work rights	10
Ability to get visa/visa processing time	10
Quality of education	10
Ranking of institution	8

Americas

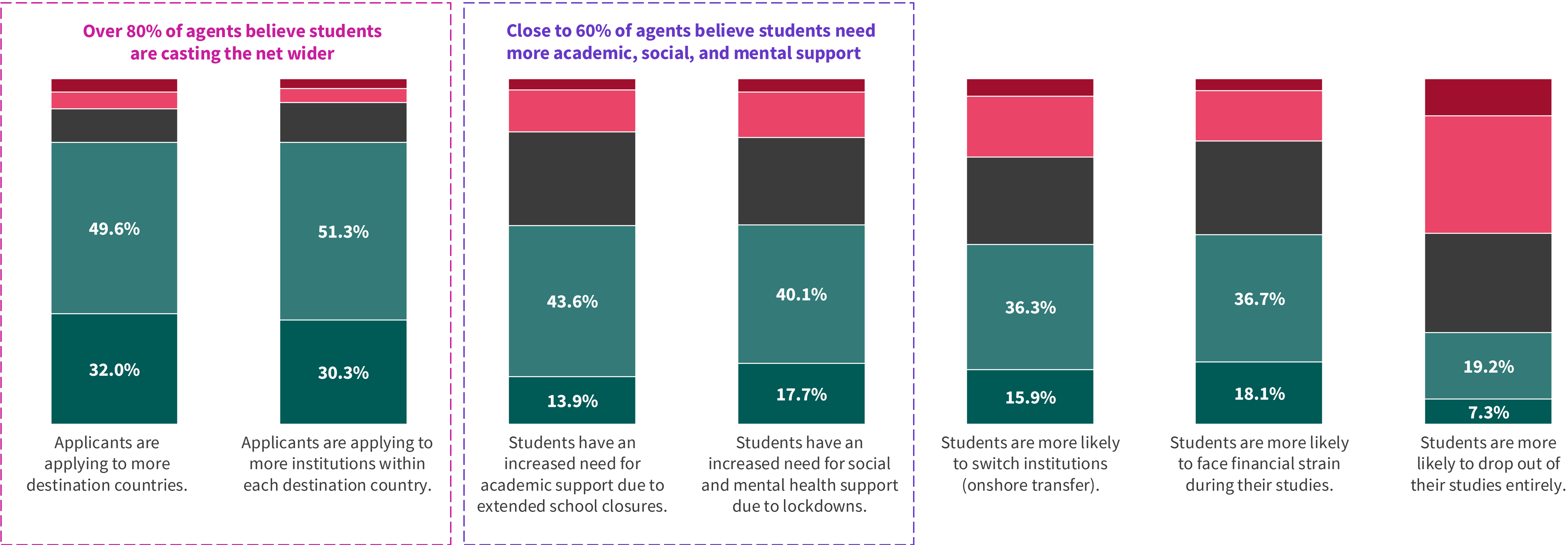
Cost of study (fees and living costs)	37
Opportunities to work while studying	32
Access to post study work rights	30
Opportunities for permanent migration	25
Quality of education	21



Agents indicate that a high proportion of students are applying to more institutions across more destination countries. Agents also indicate that student have increased needs once the arrive for study.

Please indicate to what extent you would agree to the following statements regarding changes in student needs and choices in the past twelve months

% of Respondents by Response

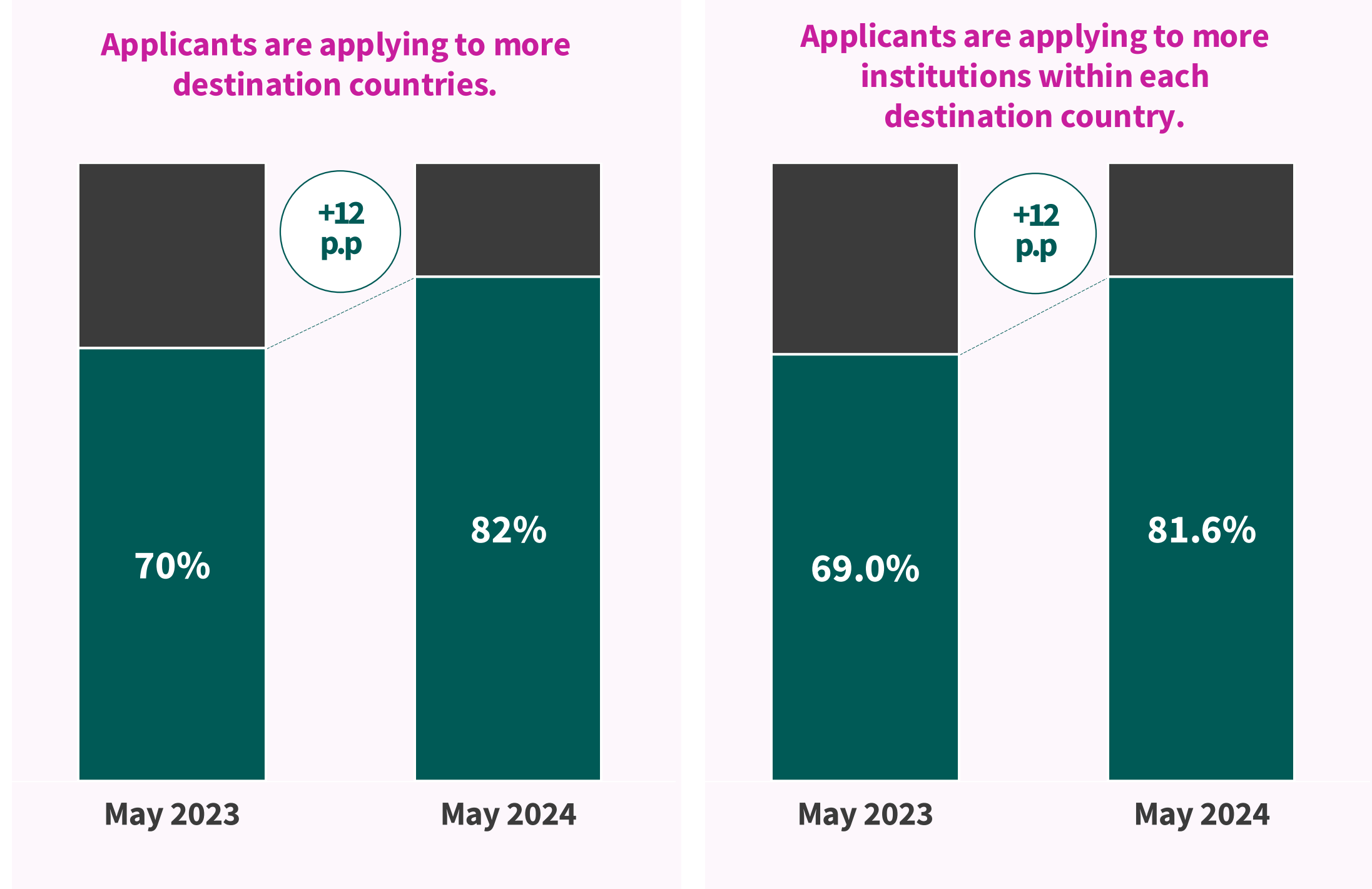


The extent to which agents believe students are casting the net wider has grown since last year. Even as the pandemic recedes, agents still indicate that students need additional levels of support.

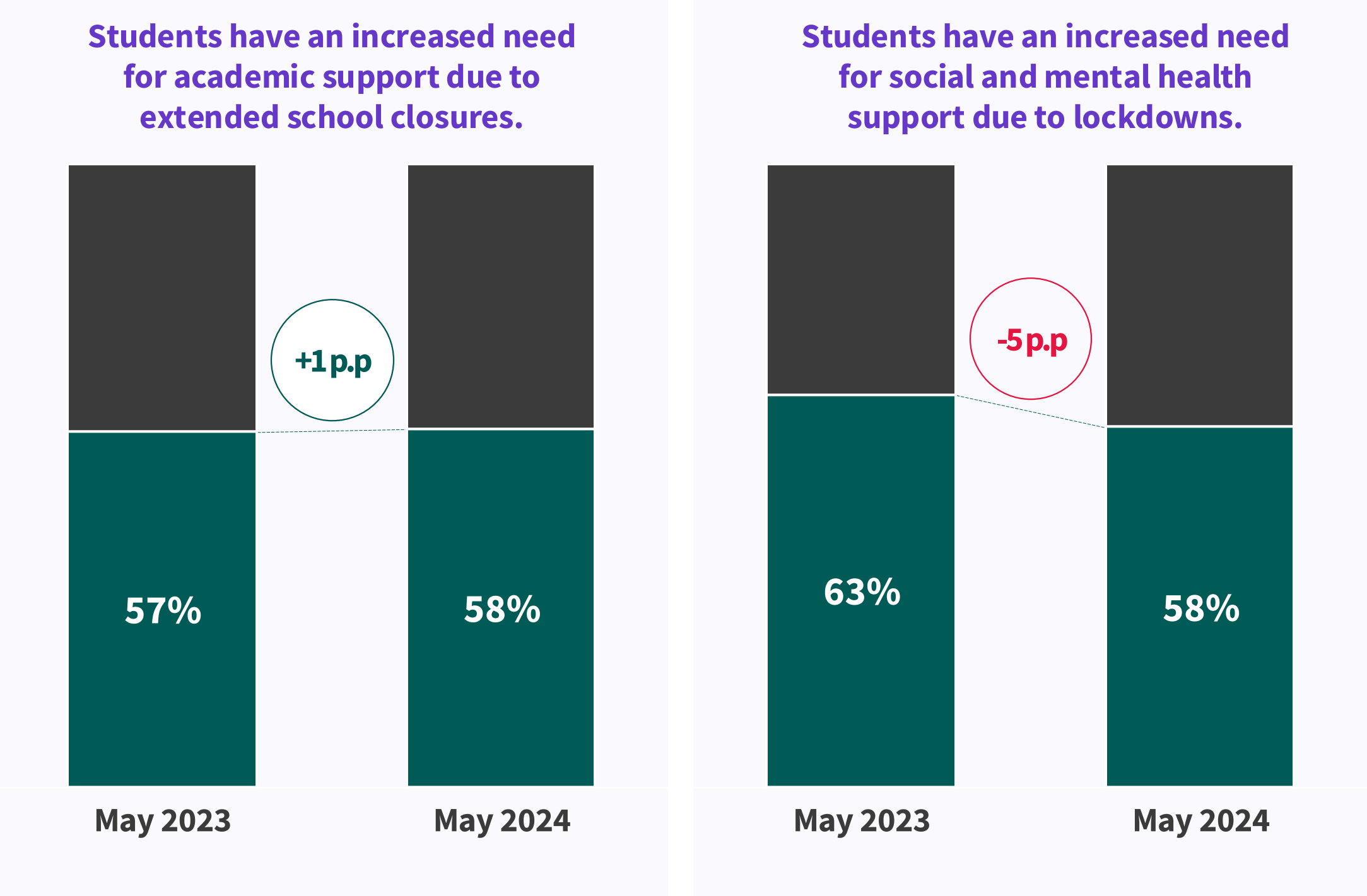
Please indicate to what extent you would agree to the following statements regarding changes in student needs and choices in the past twelve months **(comparison of May 2023 and May 2024 results)**

% of Respondents by Response

Student choice



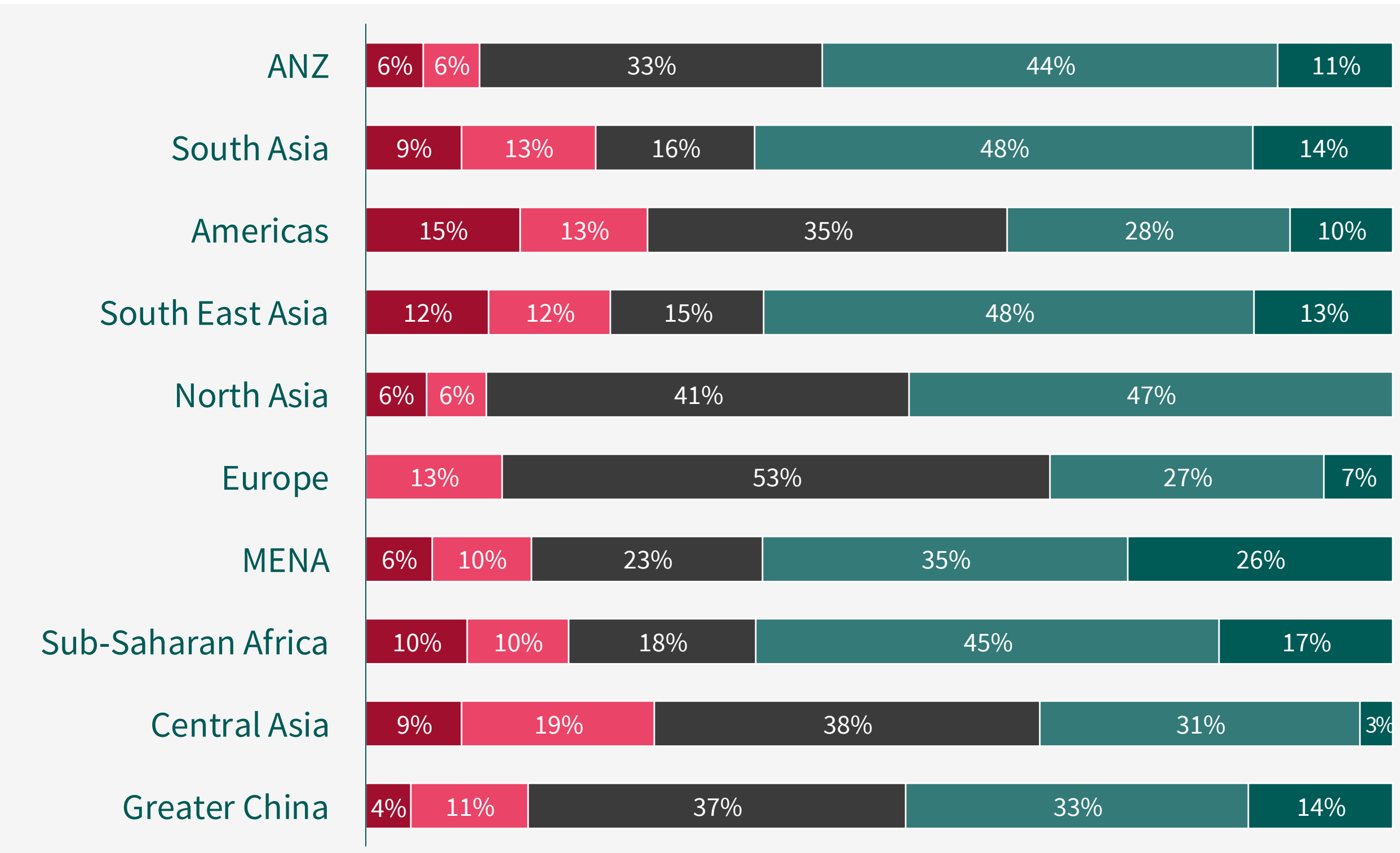
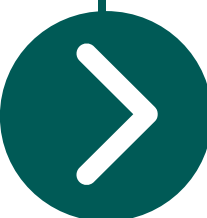
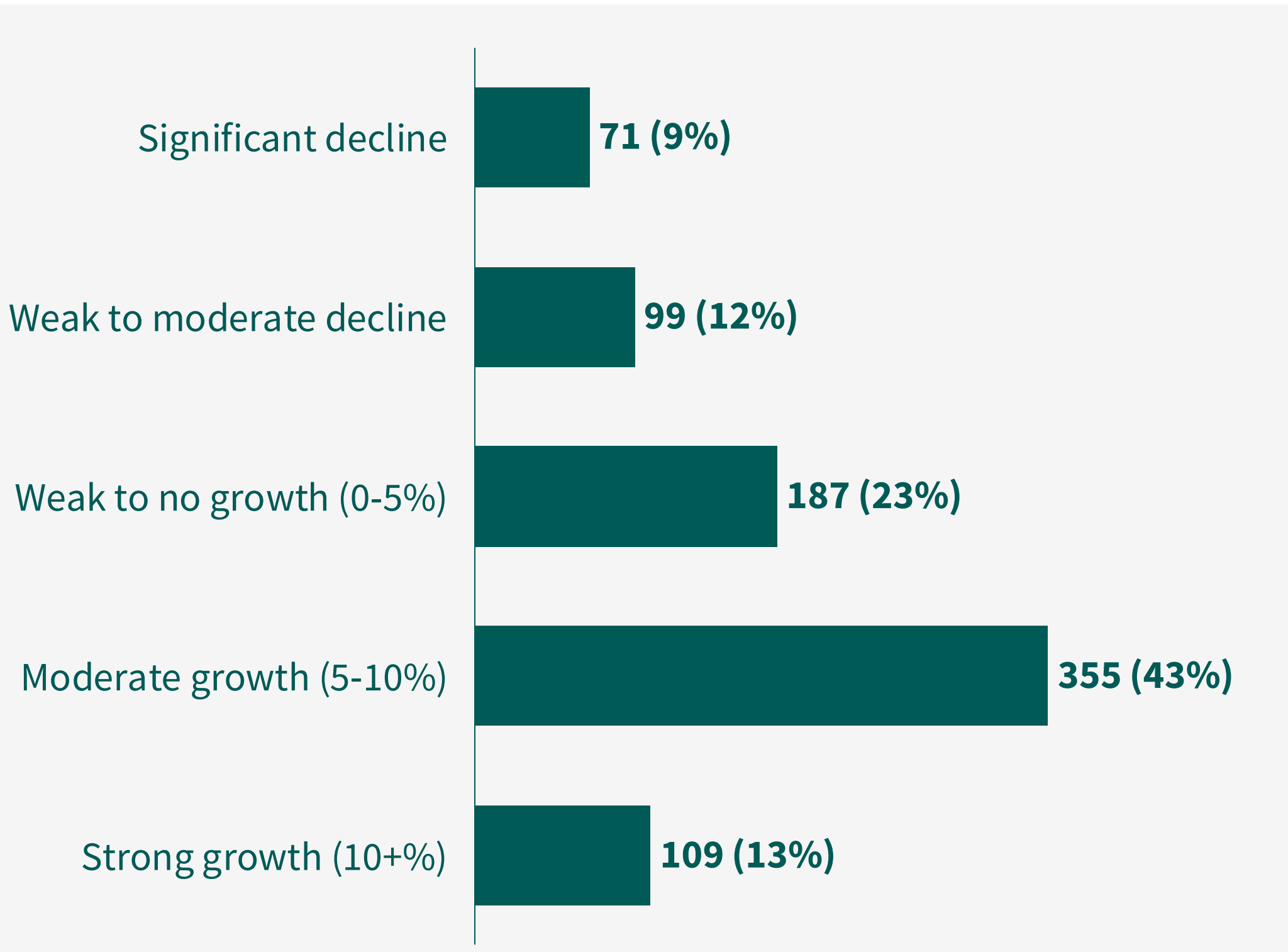
Student need



■ Strongly Agree + Agree ■ Neutral + Disagree

Agents indicate that the need for pathway programs has increased over the past 12 months, especially across the Middle East, Africa, and South Asia.

“In your opinion, has there been a change over the last 12 months in the number of students requiring a pathway program?”

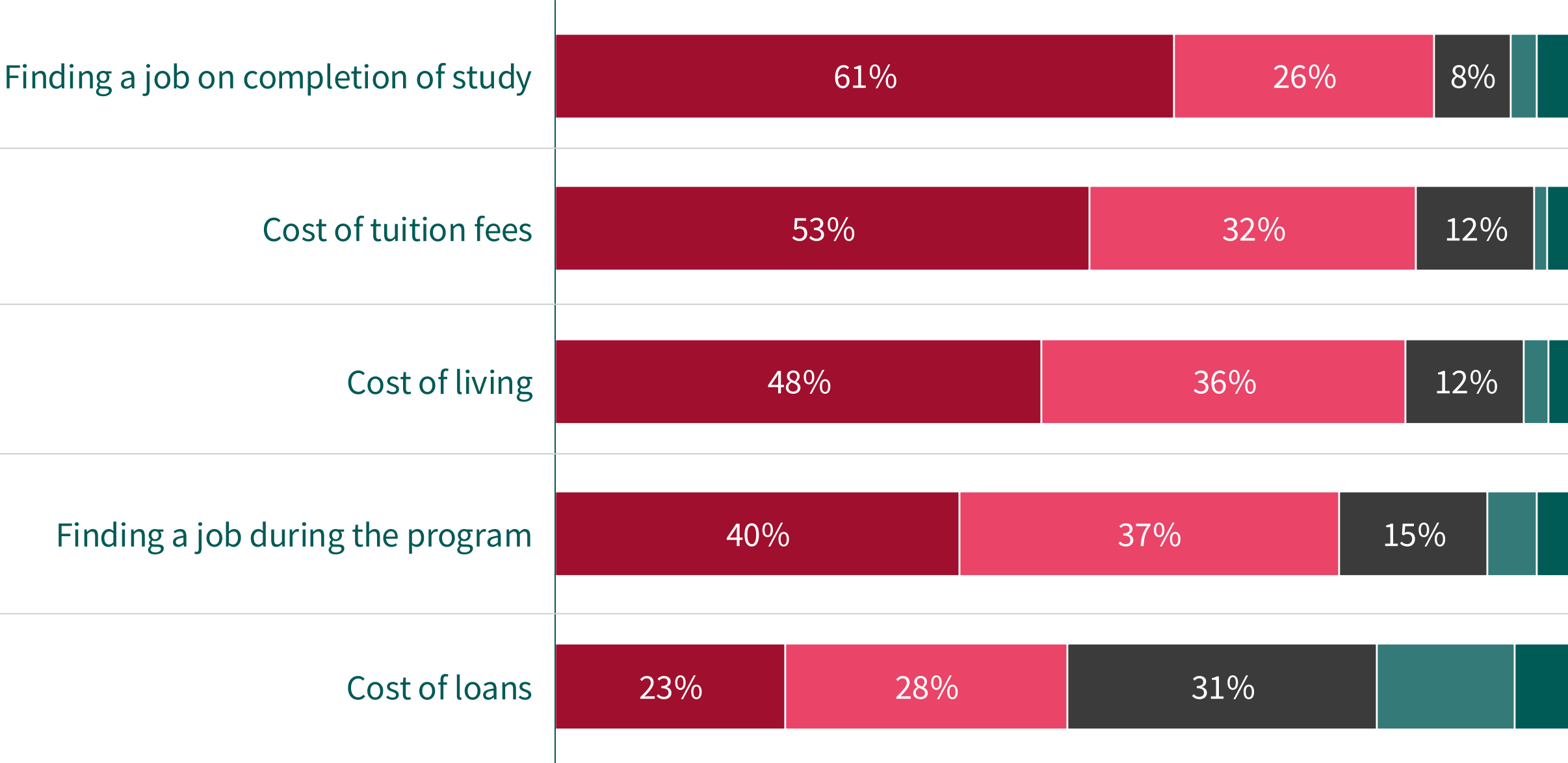


■ Significant decline ■ Moderate growth (5-10%)
■ Weak to moderate decline ■ Strong growth (10+%)
■ Weak to no growth (0-5%)

In the current macro-economic climate, agents indicate students are concerned about employment options during study, while concerns around the cost of living and tuition have decreased slightly since last year.

Q: On the whole, how concerned are your clients about the following...

% of Respondents by Response



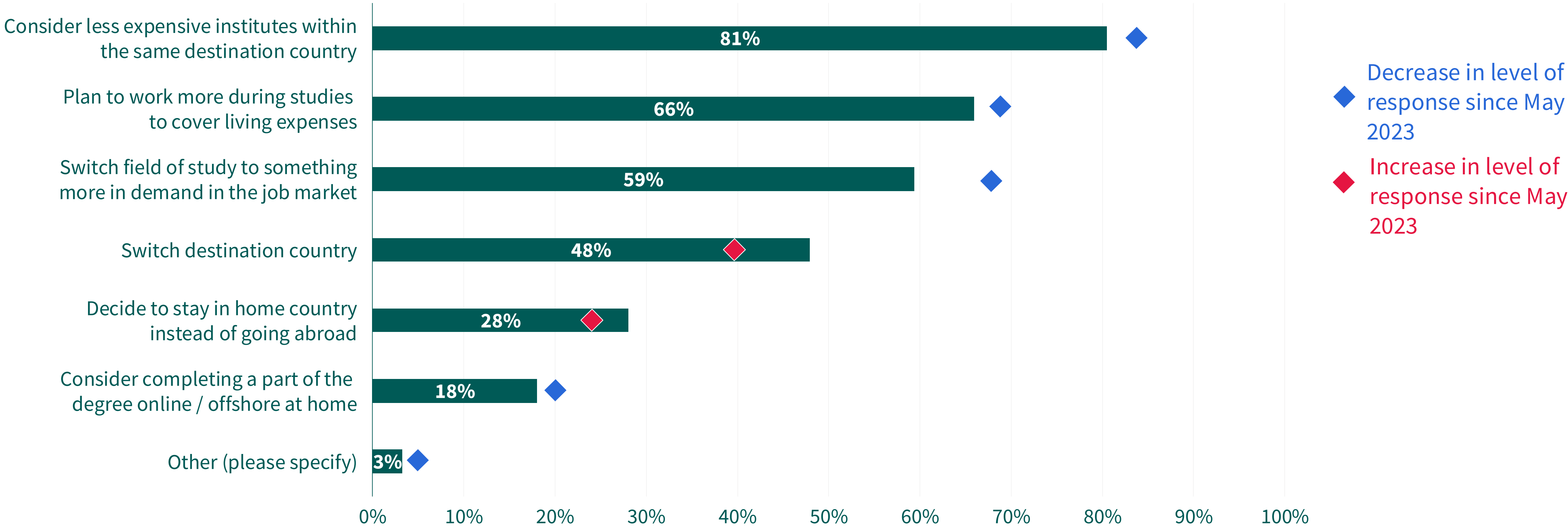
Comparison to last year

	May 2023 % Very Concerned + Concerned	May 2024 % Very Concerned + Concerned	Change
Finding a job on completion of study	88%	87%	-1 p.p
Cost of tuition fees	92%	85%	-7 p.p
Cost of living	90%	84%	-6 p.p
Finding a job during the program	73%	77%	+4 p.p
Cost of loans	50%	51%	+1 p.p

■ Very concerned
 ■ Concerned
 ■ Neutral
 ■ Unconcerned
 ■ Very unconcerned

Agents report a moderation in how students are responding to economic conditions, but students are more likely to switch destination countries or stay home.

Q: For students who are concerned about shifts in the global economy, what do you think are the three most common ways students might respond?



All destination snapshot

Safe and stable

% respondents who Agree/Strongly Agree the reputation of this destination has improved on this parameter

Open & welcoming

% respondents who Agree/Strongly Agree the reputation of this destination has improved on this parameter

More interest

% respondents who Agree/Strongly Agree that there has been more interest in this country over the past two months

	Safe and stable	Open & welcoming	More interest
Australia	81	61	71
Canada	65	53	57
New Zealand	84	76	69
United Kingdom	74	71	72
USA	57	63	72
Sri Lanka	46	49	37
The Netherlands	70	63	65
Singapore	79	74	60
Germany	76	75	77
UAE (Dubai)	69	74	60
France	61	64	63
Indonesia	39	45	35



Please visit the Navitas Insights website for more detailed commentary and analysis

insights.navitas.com

Navitas (2024) Navitas Agent Perception Survey, Round 8 – May 2024.