

Agents for Change

Global Perspectives on Shifting Agent Perceptions in 2024

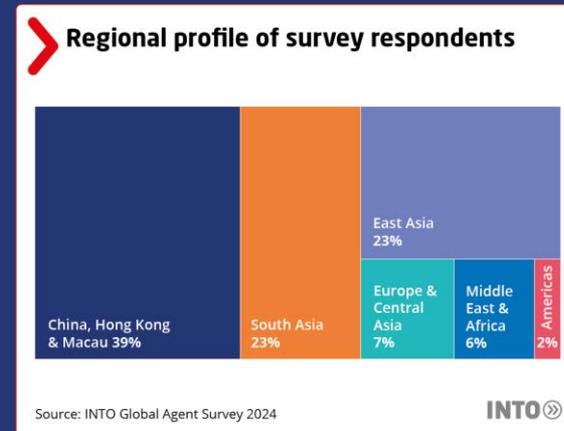
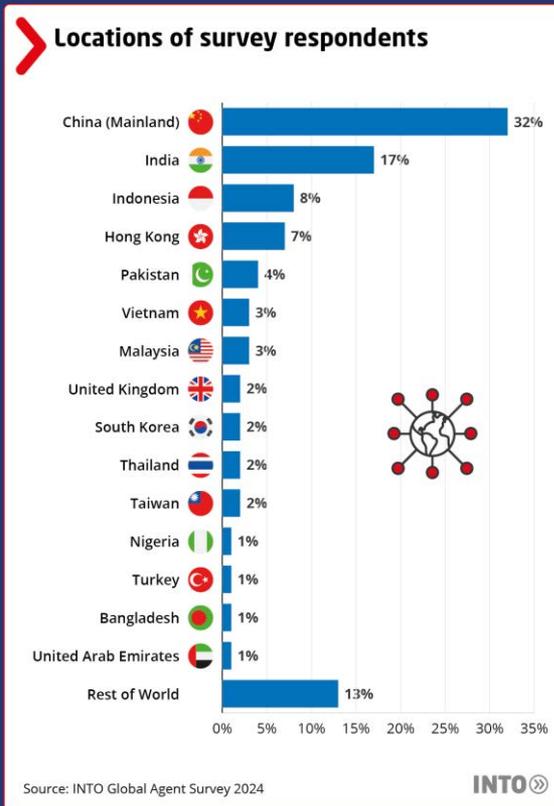
AIEC Conference
Melbourne, Australia
October 2024



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About this survey

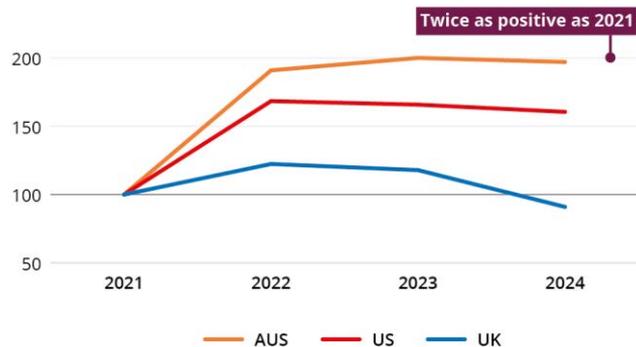
- › 1200+ responses
- › 52 countries – reflecting Australia and the world's largest source markets
- › Running for 15 years
- › Including the full spectrum of representation – from aggregator to sub-agent
- › Survey ran in February 2024



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

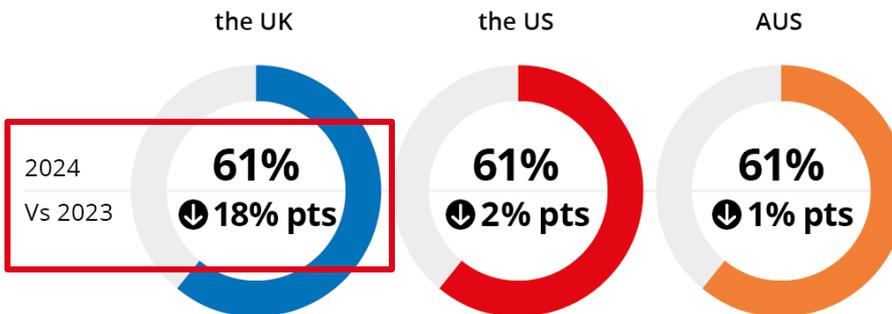
Policy matters: Noticeable dip in positive sentiment for the UK in Feb 2024

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

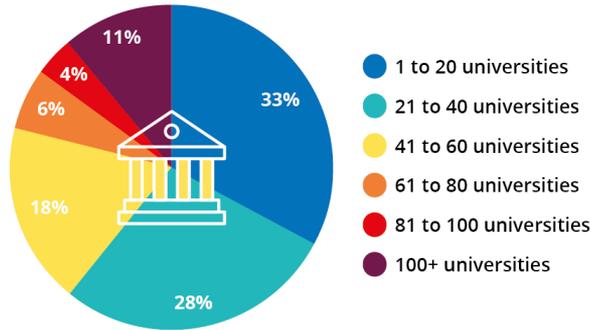
Geographic and cultural
proximity

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

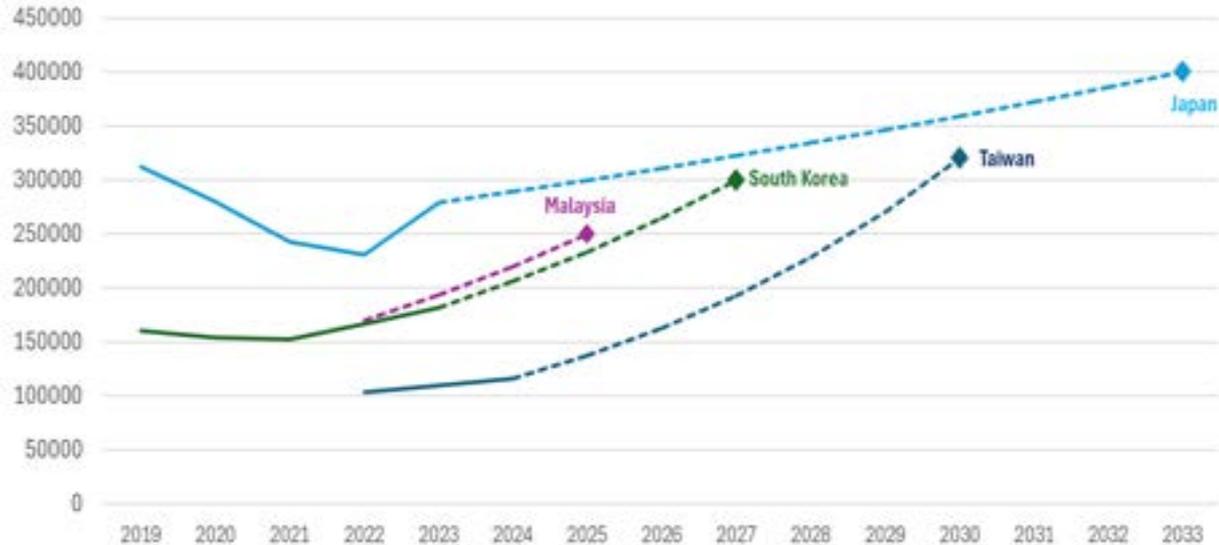
Millennial parents and
GenZ/GenAlpha students

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

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Four countries alone targeting 1M+ foreign students



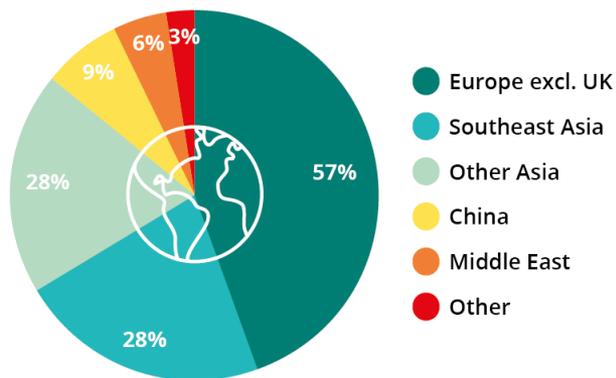
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“Now is the time to attract foreign talent strategically”

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?



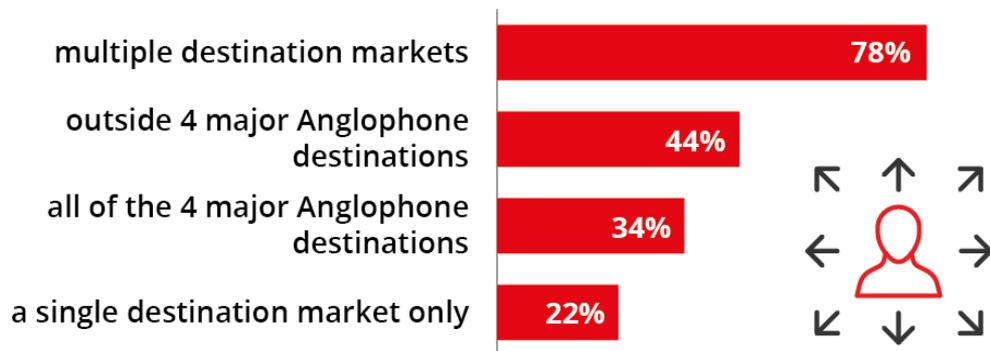
Source: INTO Global Agent Survey 2024

- › 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.”

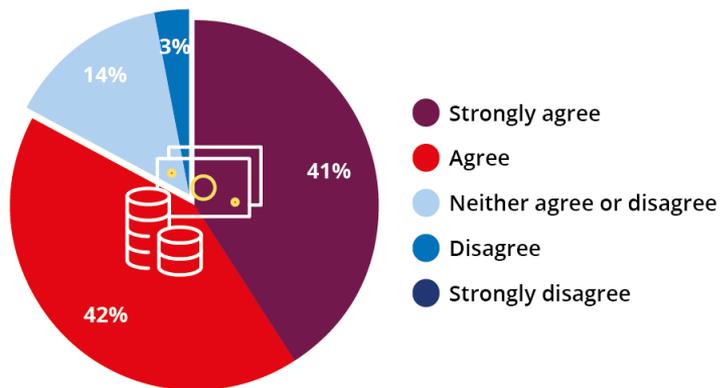
Agent
Mainland China

> 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



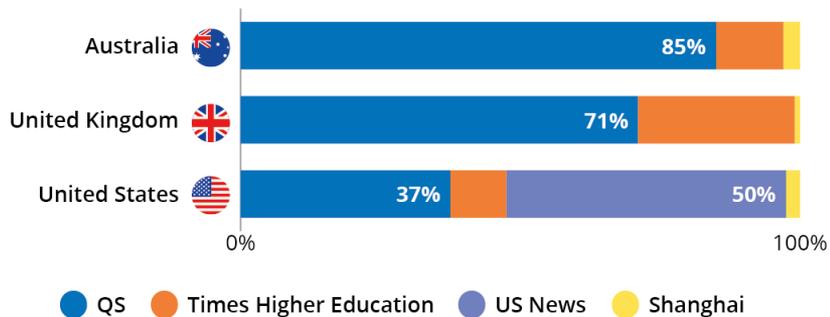
Source: INTO Global Agent Survey 2024



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



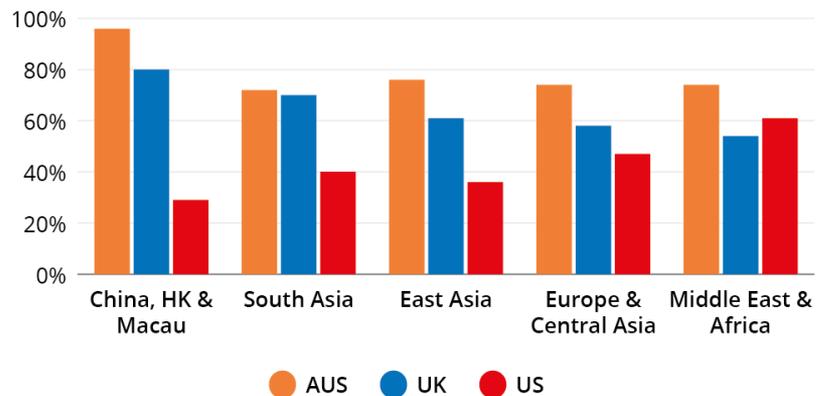
Primary global ranking used to consult students on study abroad options in...



Source: INTO Global Agent Survey 2024



Bias towards use of QS as primary global ranking



Source: INTO Global Agent Survey 2024

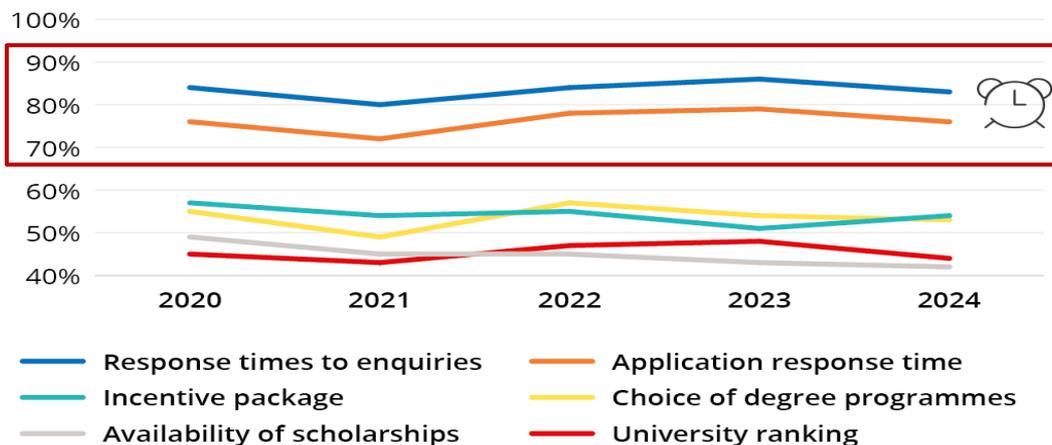


“If you snooze you lose”

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



Factors cited as very important by agents



Good News??

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

Source: INTO Global Agent Survey 2024

- › 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

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