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Agent Voice 2022/23

Up to date insight into global student recruitment agents' changing world.

Languages Canada Conference 2023

Introduction

- Initially launched in 2020, ICEF Agent Voice is an annual survey voicing the opinions of student recruitment agents across the globe
- Why is this information important to us?
- Downloadable infographic version now available at www.icef.com/agent-voice





Four sections

1 **Review & Forecast:
2020–2022**

2 **Recruiting for Online
Programmes**

3 **Recruitment,
Commission &
Payments**

4 **Study Destinations
& Visa Approval
Rates**





Agent Profile





410

AGENTS





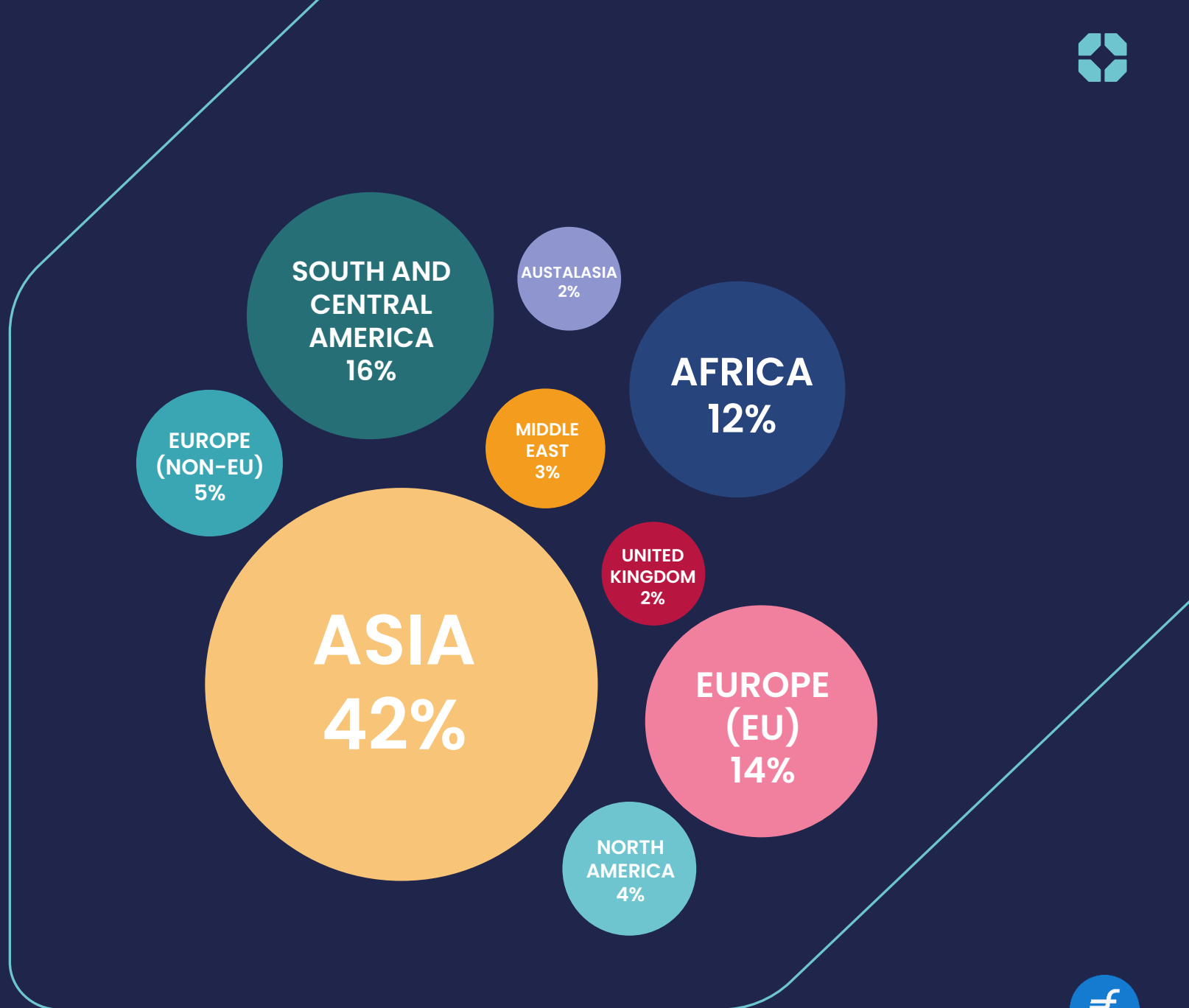
81

COUNTRIES



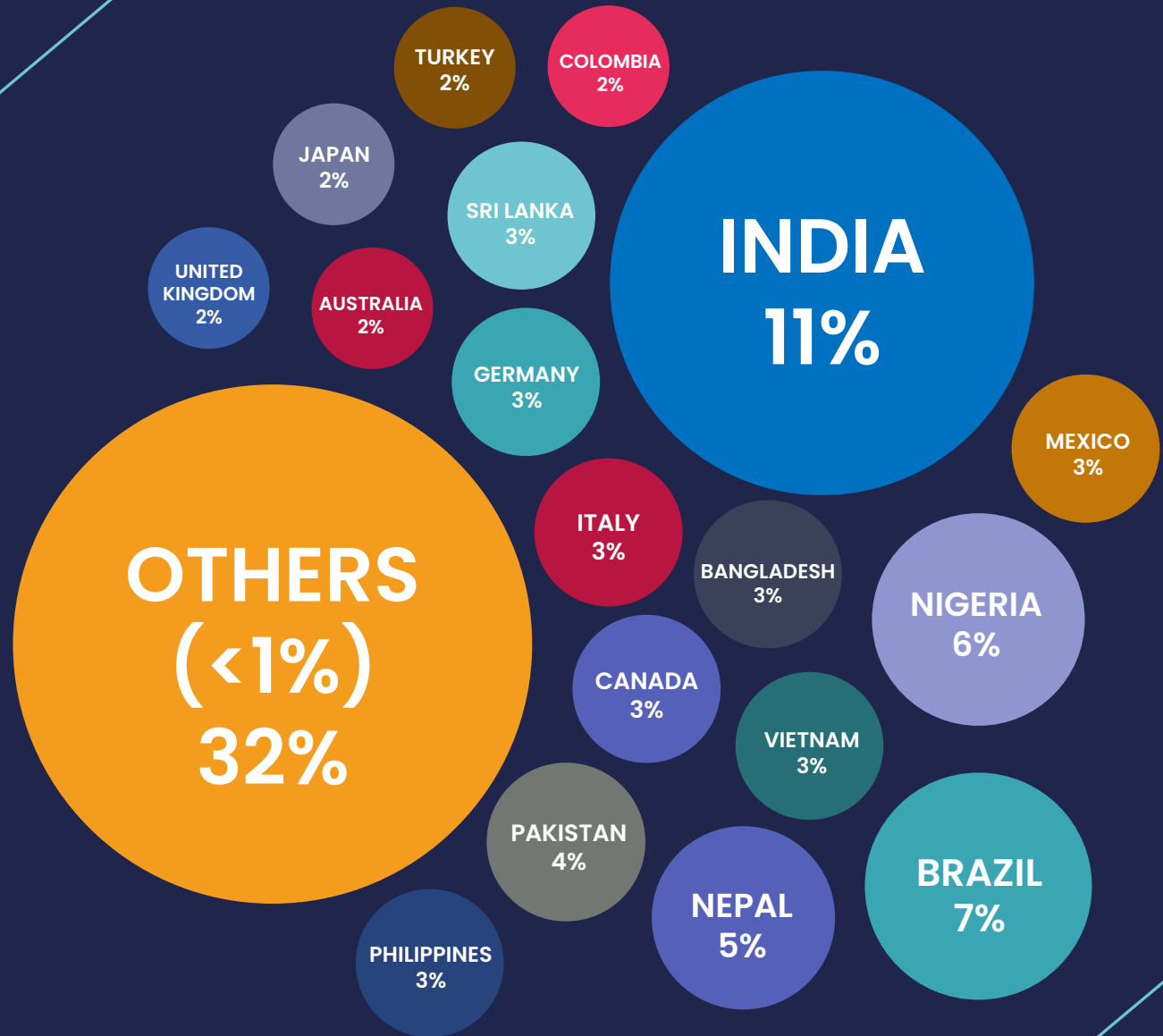


ACROSS 9 REGIONS





Broken down to each country





1. Review & Forecast



The future is bright.

73% of agents told us that interest in studying abroad increased in 2022.

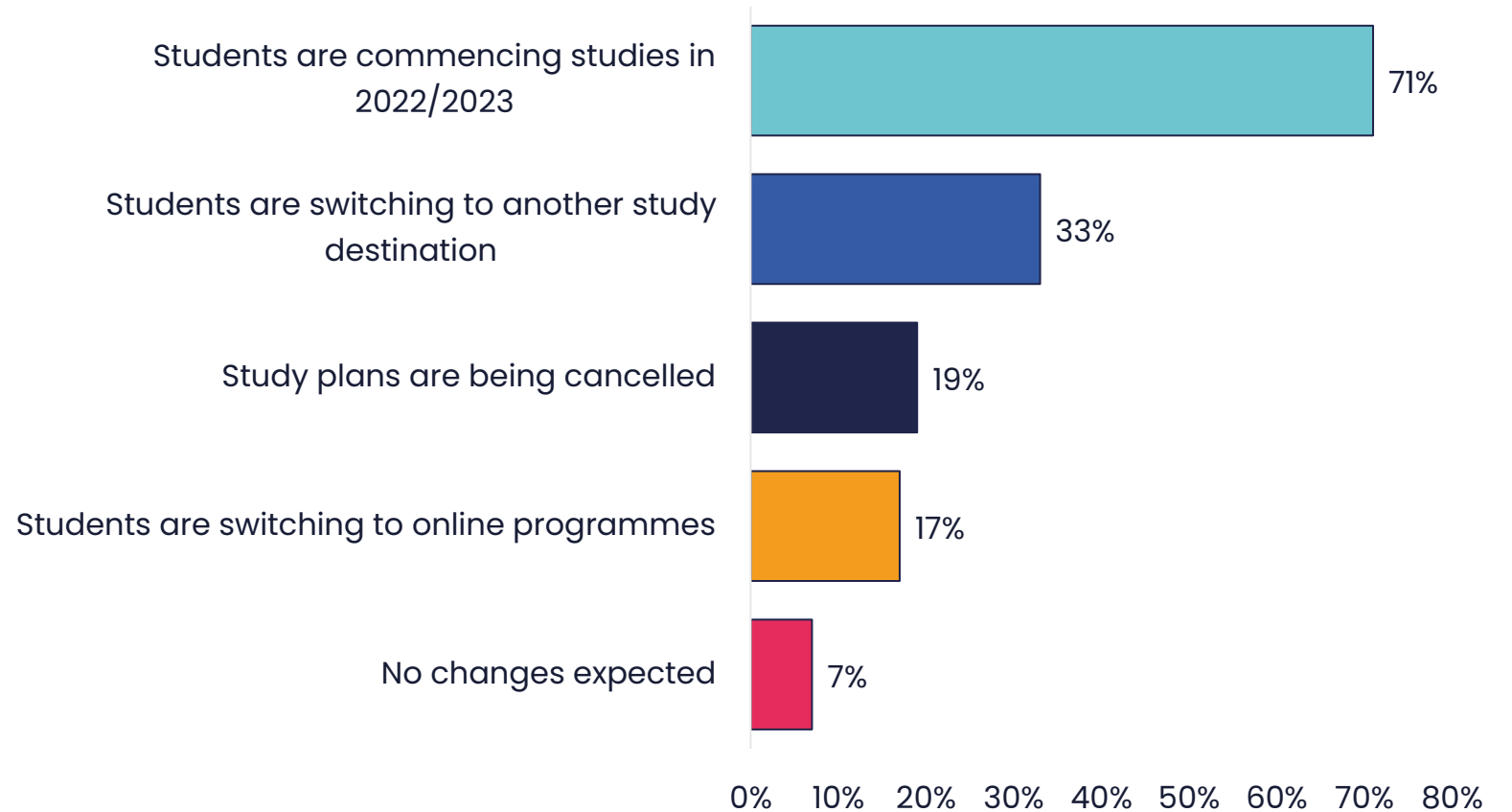




Forecasting:

Many students had their plans to study abroad severely impacted in 2020/2021

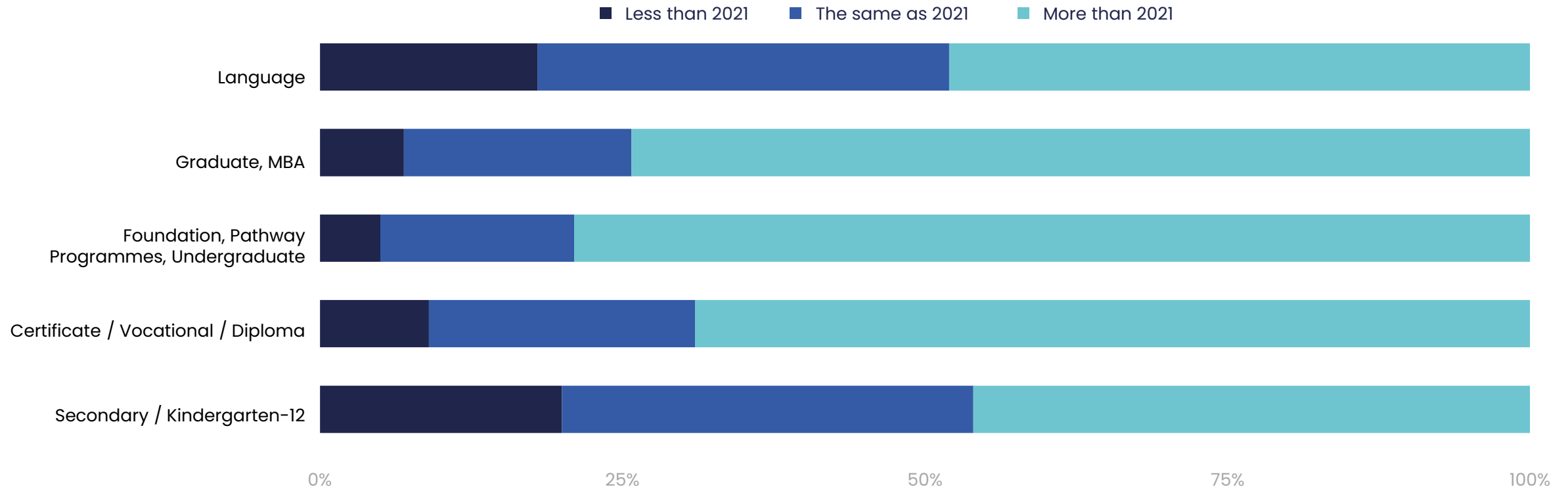
What is your outlook for 2023?





Enrolment Expectation

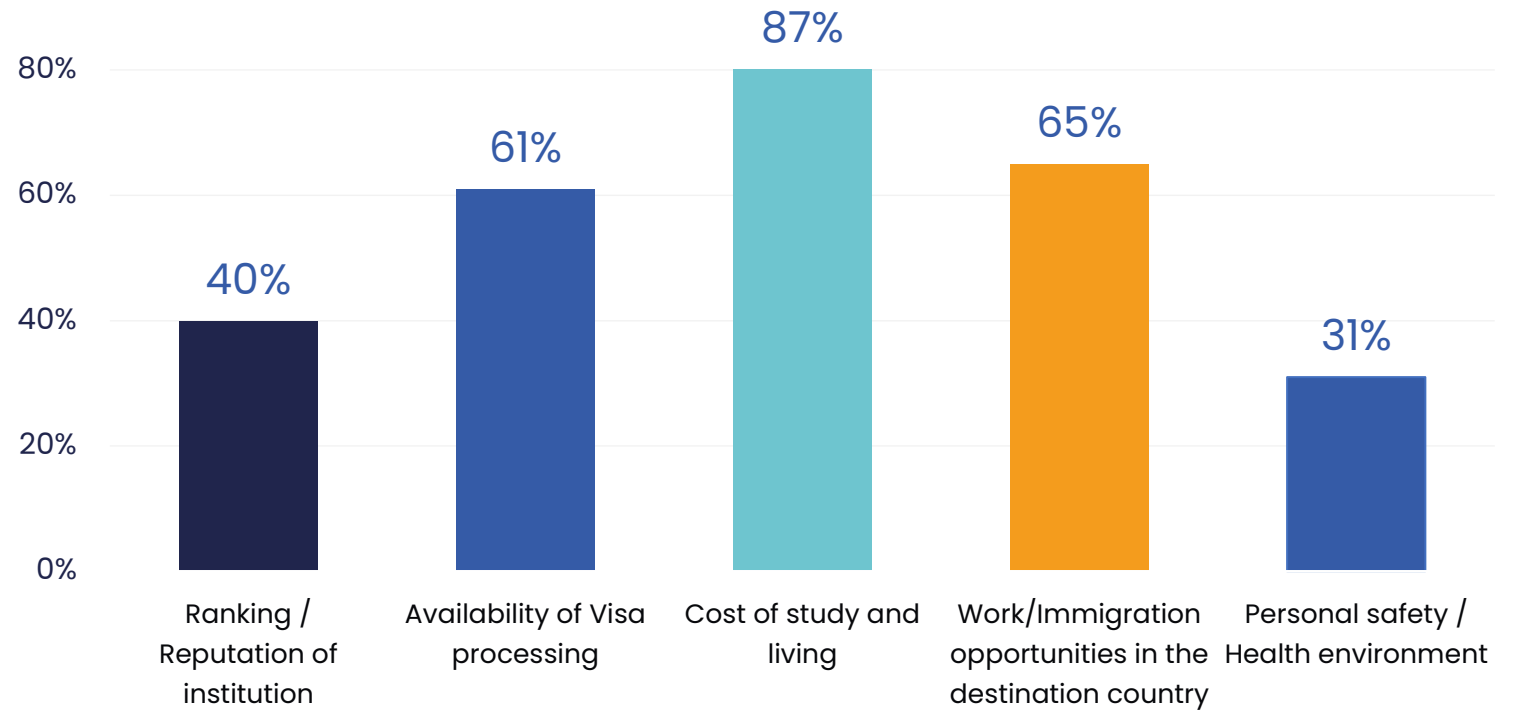
What are your expectations for student enrolment figures for 2023?





Important factors for studying abroad

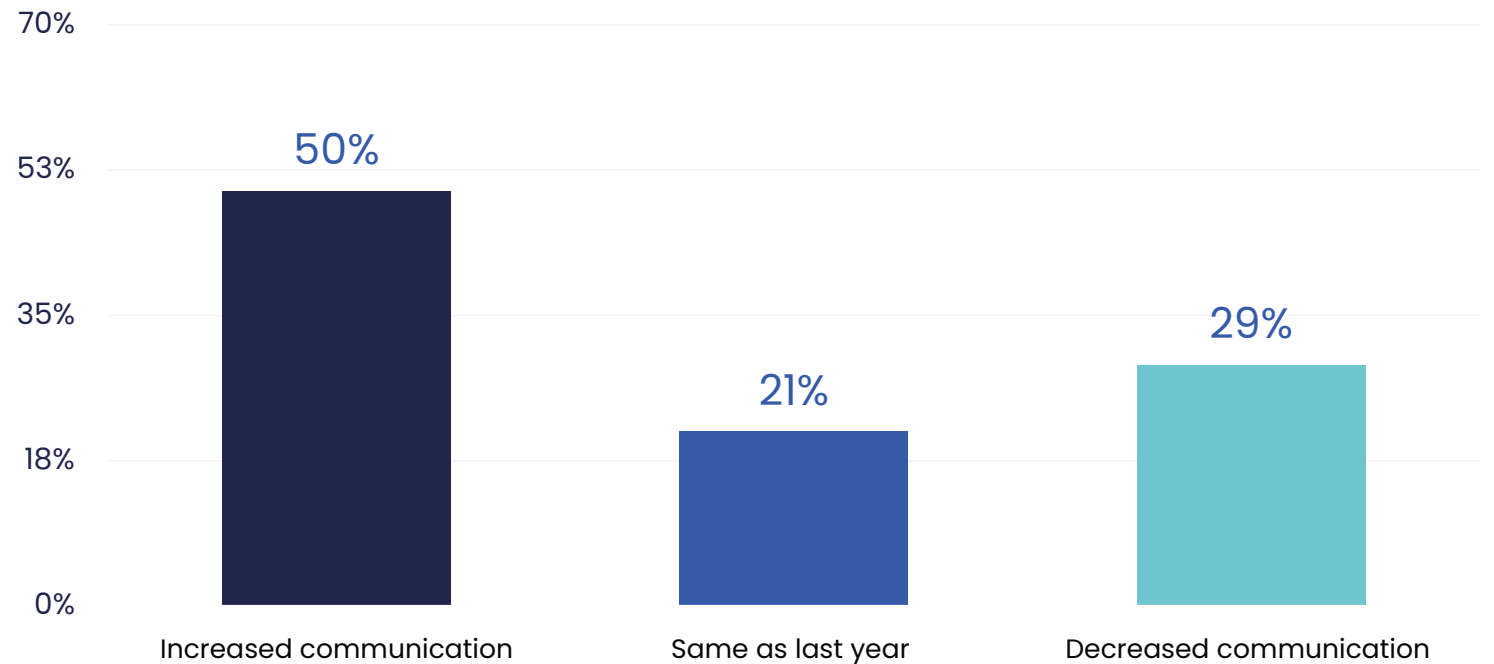
When planning their study abroad, which are your students' most important decision-making factors?





Educator Partner Communication

How frequently are you communicating with your education partners compared to last year?





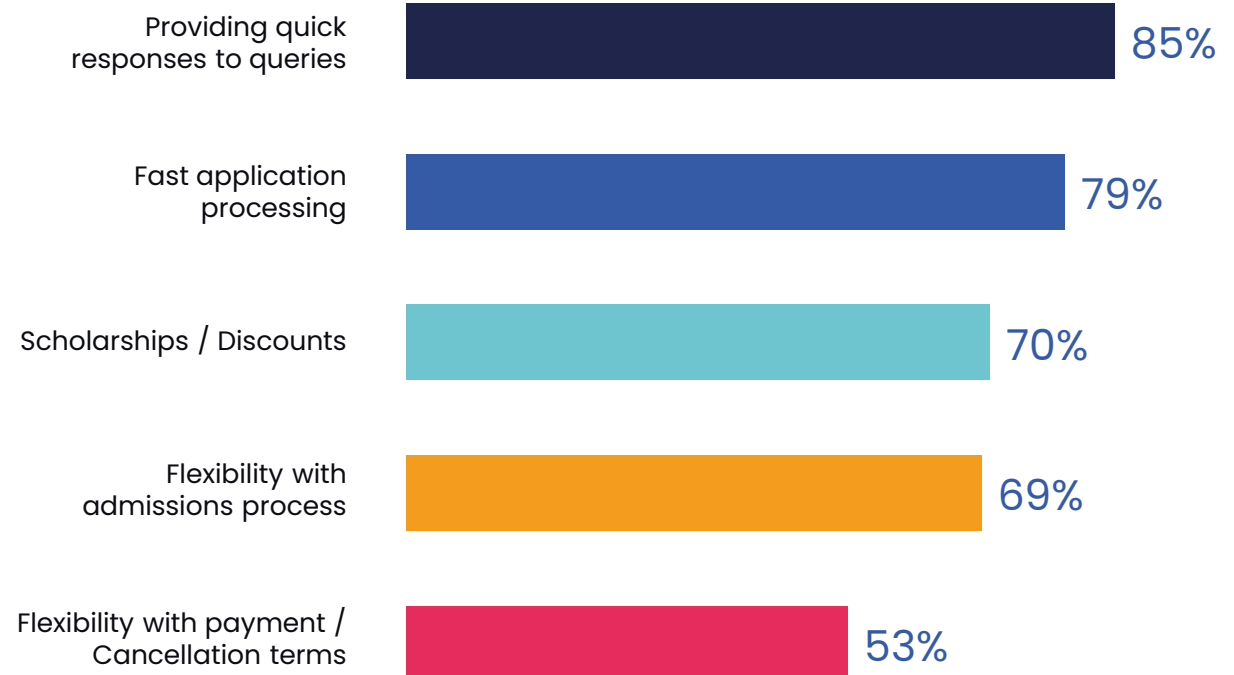
88%

of agents have established
new partnerships in the
past 2 years



Enrolment Support

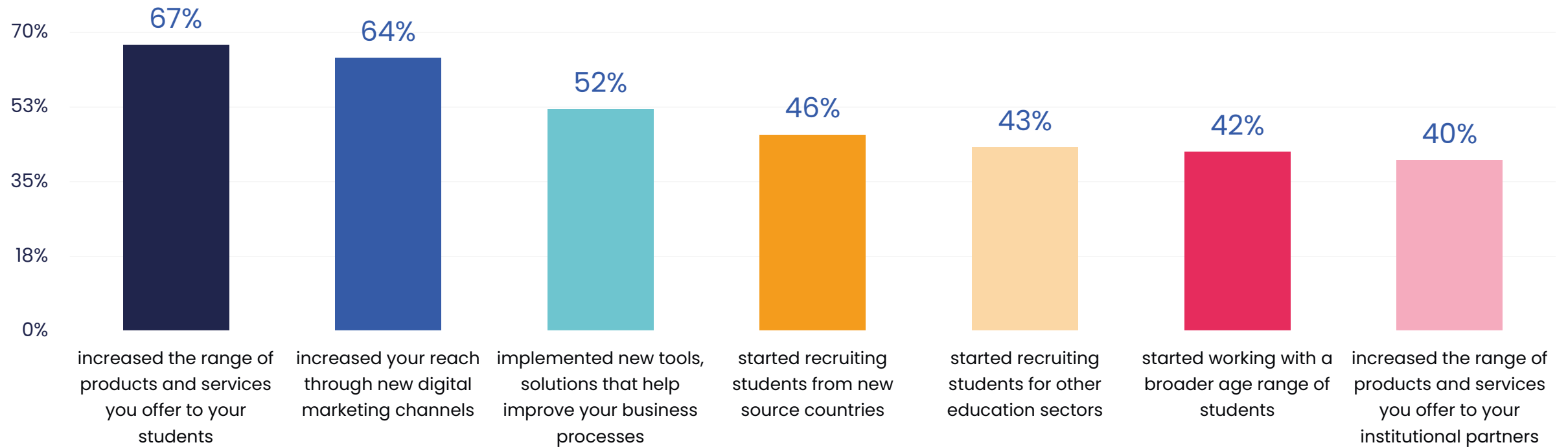
From the options below, what areas do you most value the support of your partner schools when it comes to successfully enrolling students?





Growth Efforts

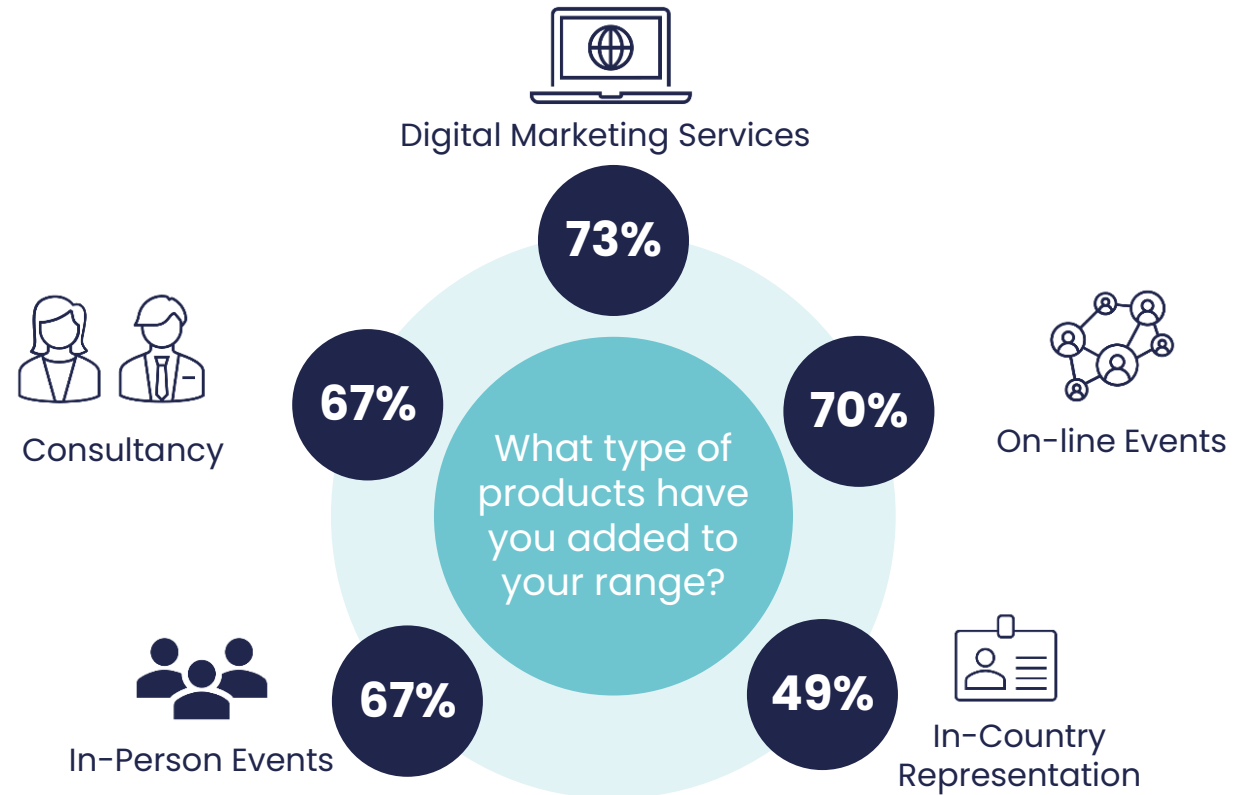
In the last 2 years, have you:





Products and services offered to partners

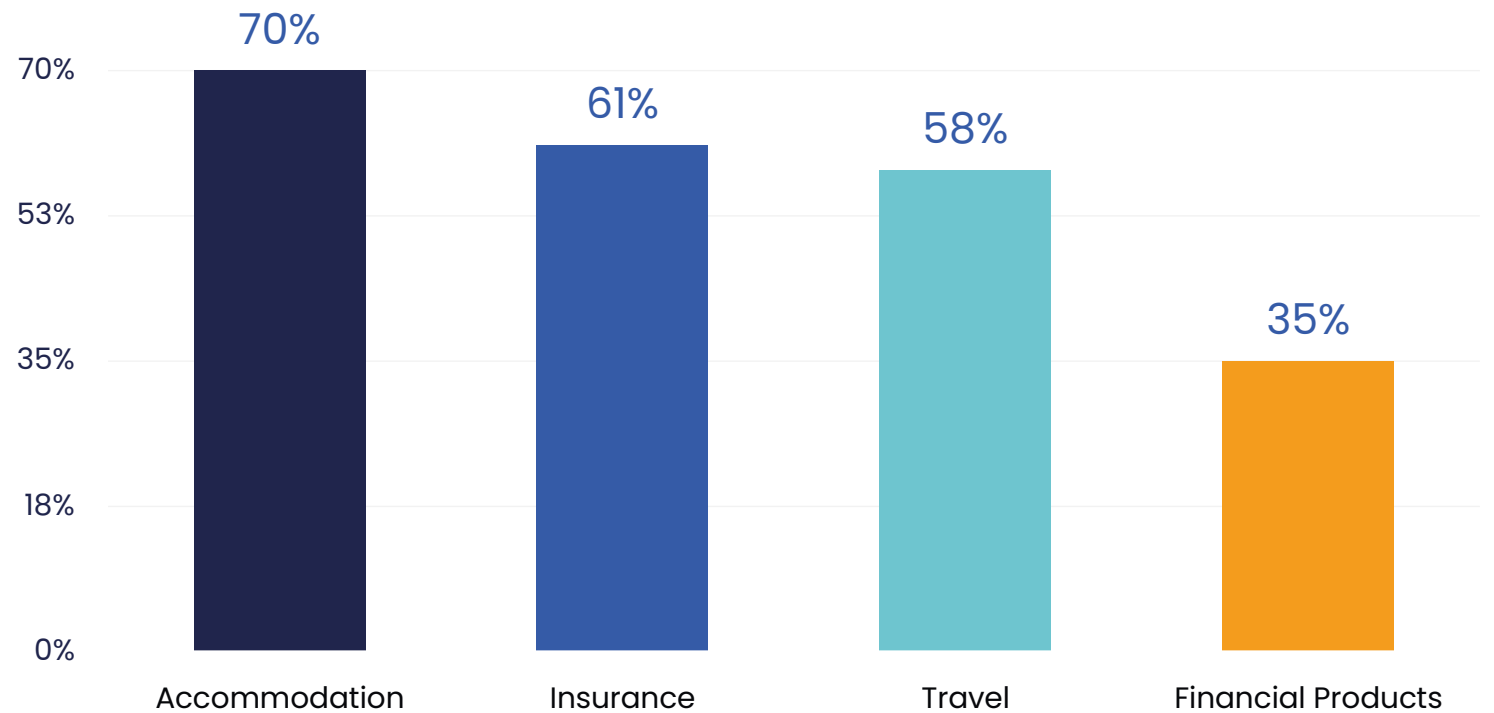
What type of products have you added to your range?





Products and services offered to students

What third-party products or services have you added to your range?

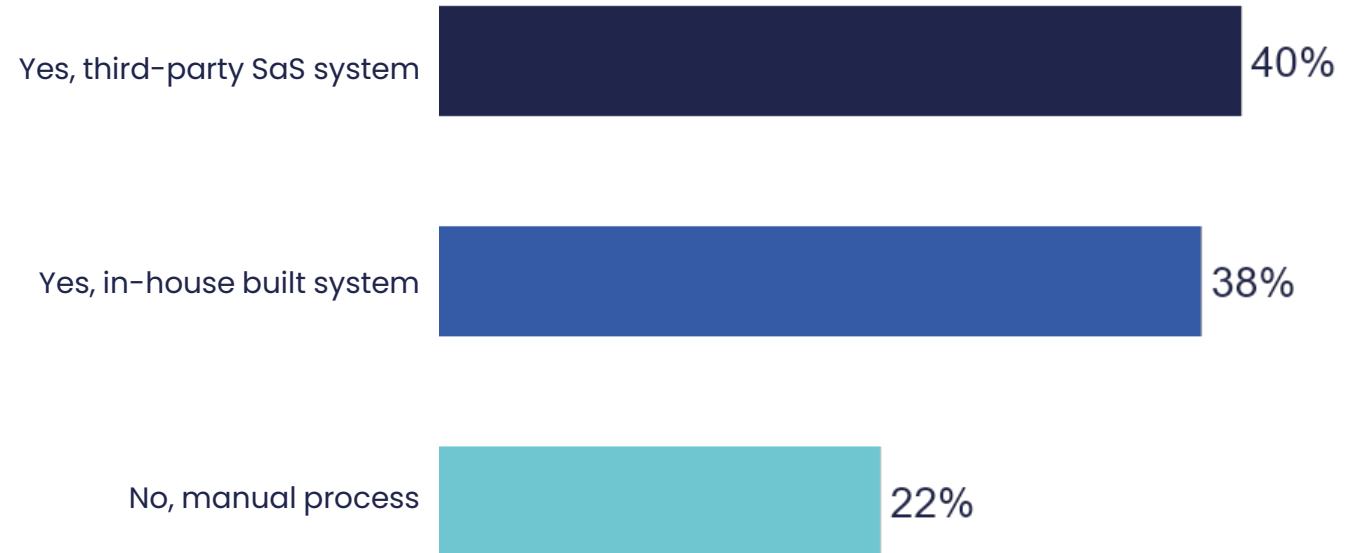




Student Information Management



Do you use a CRM system or any software to manage your student information?



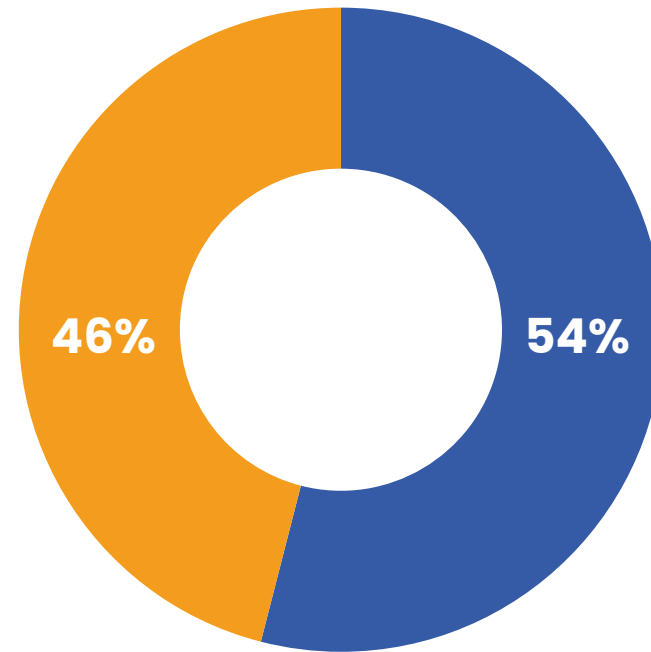


2. Recruiting for Online Programmes



Online programmes

Are you currently selling or promoting online education / online programmes?



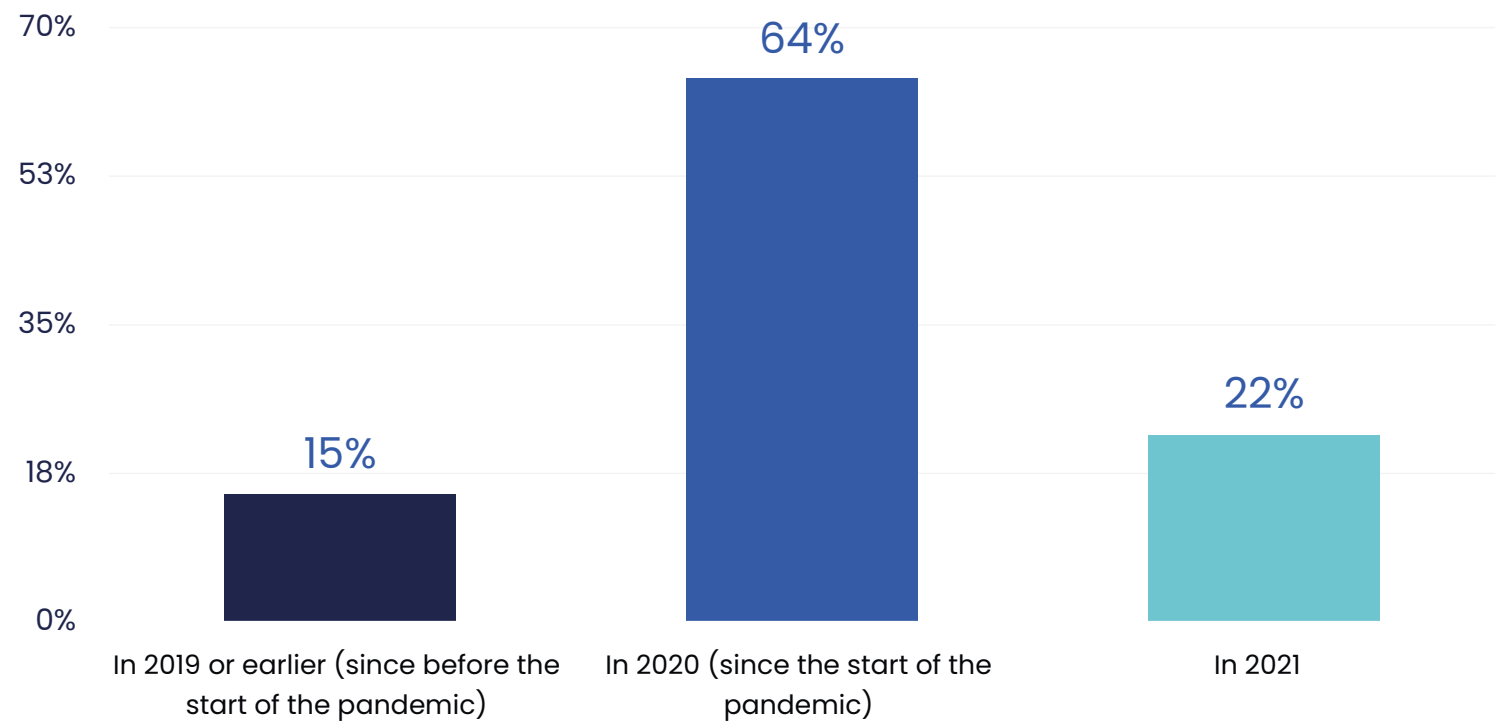
■ Yes ■ No





Online programmes

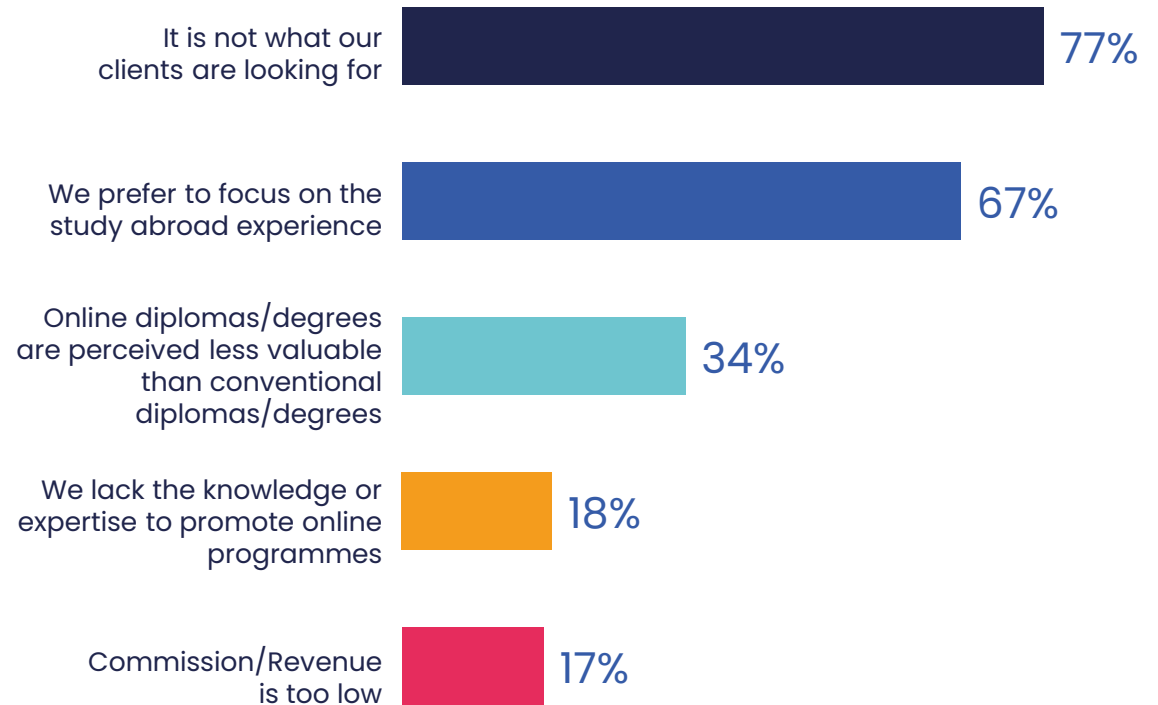
When did you start selling and promoting online programmes?





46% not currently promoting online programmes:

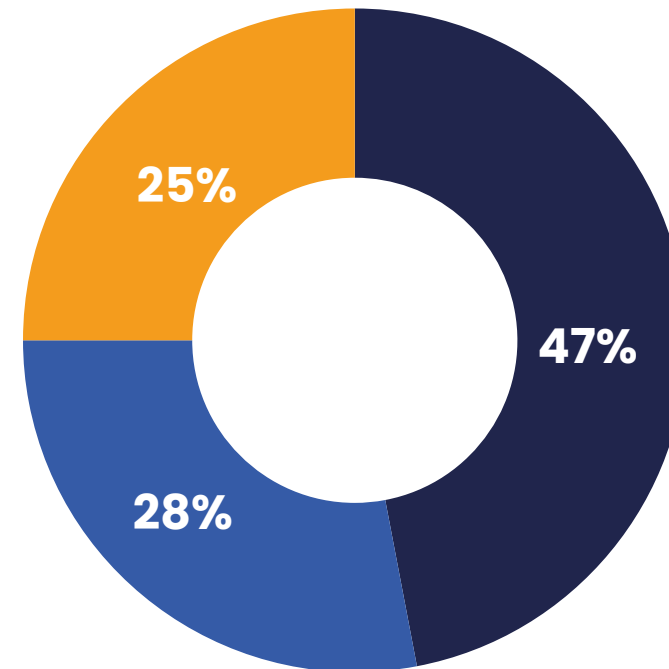
Why has your agency chosen not to sell or promote online education / online programmes?





46% not currently promoting online programmes:

Are you considering the promotion of online programmes in the near future?



■ Maybe, if... ■ Yes, absolutely ■ No





Considering promotion of online programmes:

Maybe if...

Our clients start asking for it



Provide a pathway to overseas working opportunities/ work visa



Commission/ Revenue potential increases



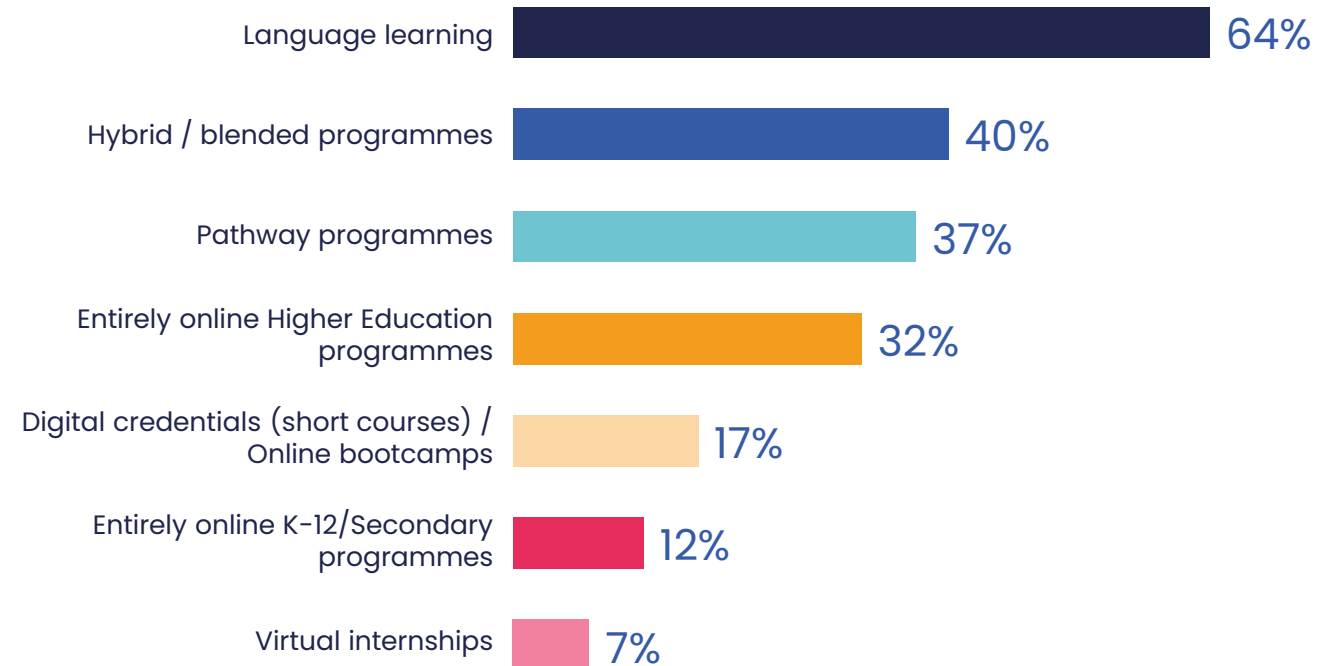
Better information/ training about the online opportunities





**54% promoting
online
programmes:**

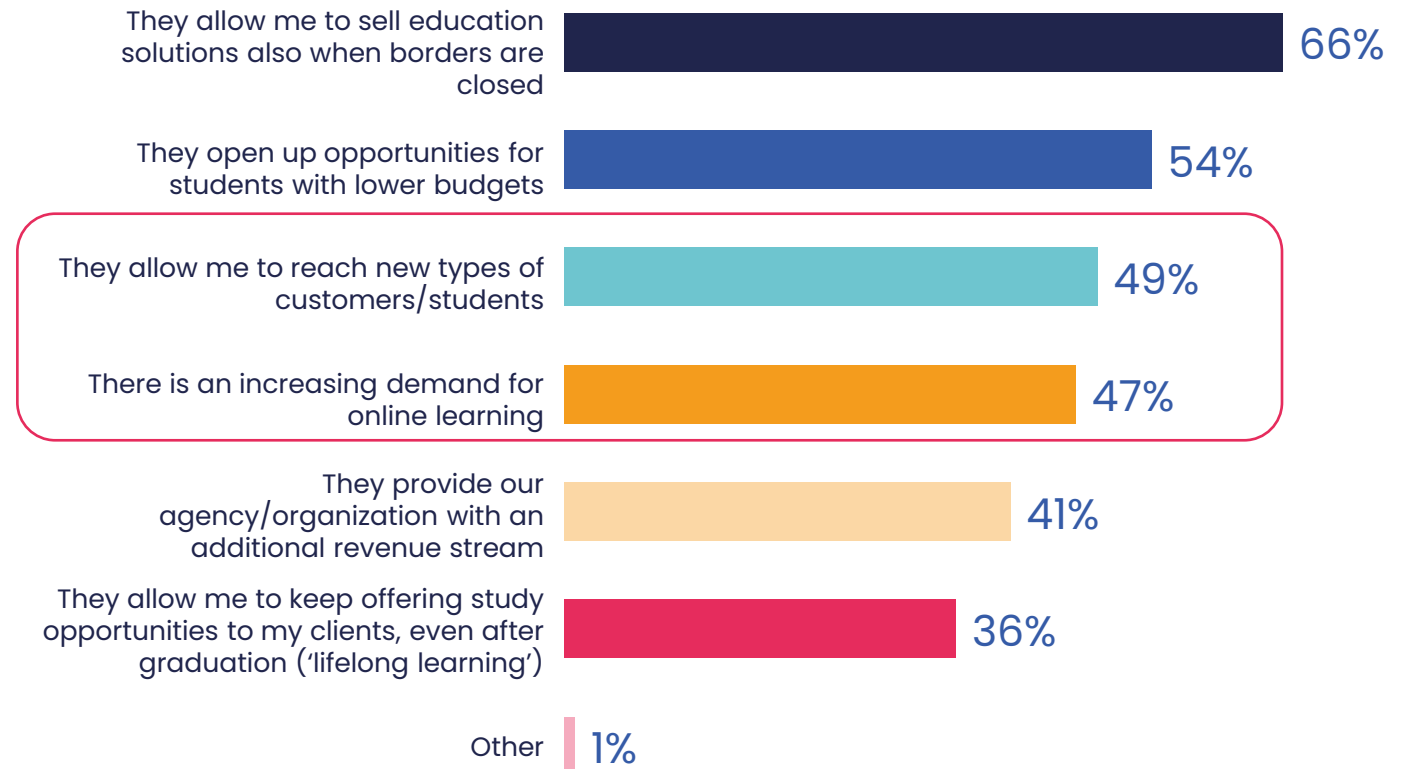
Which types of online education / online programmes are you promoting?





54% promoting online programmes:

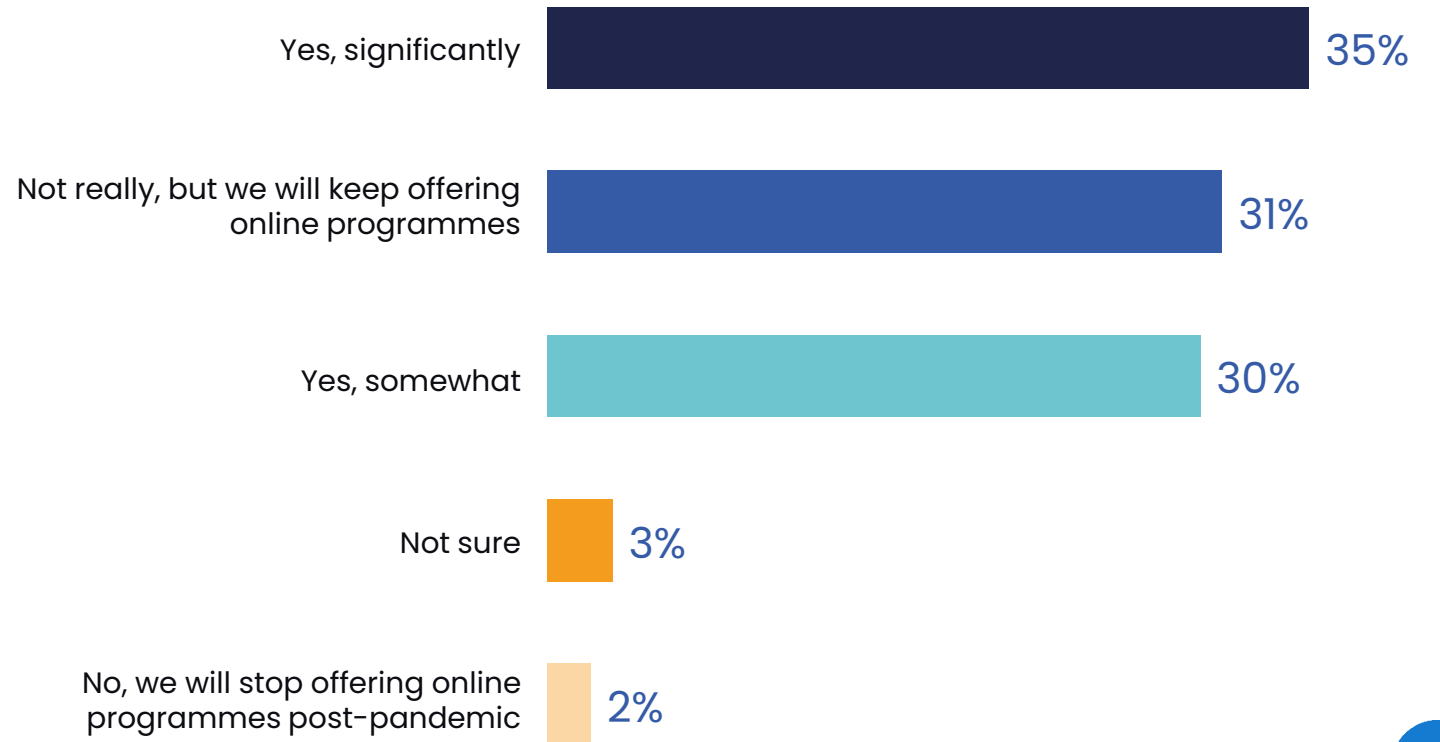
Why do you offer and promote online programmes?





50% promoting online programmes:

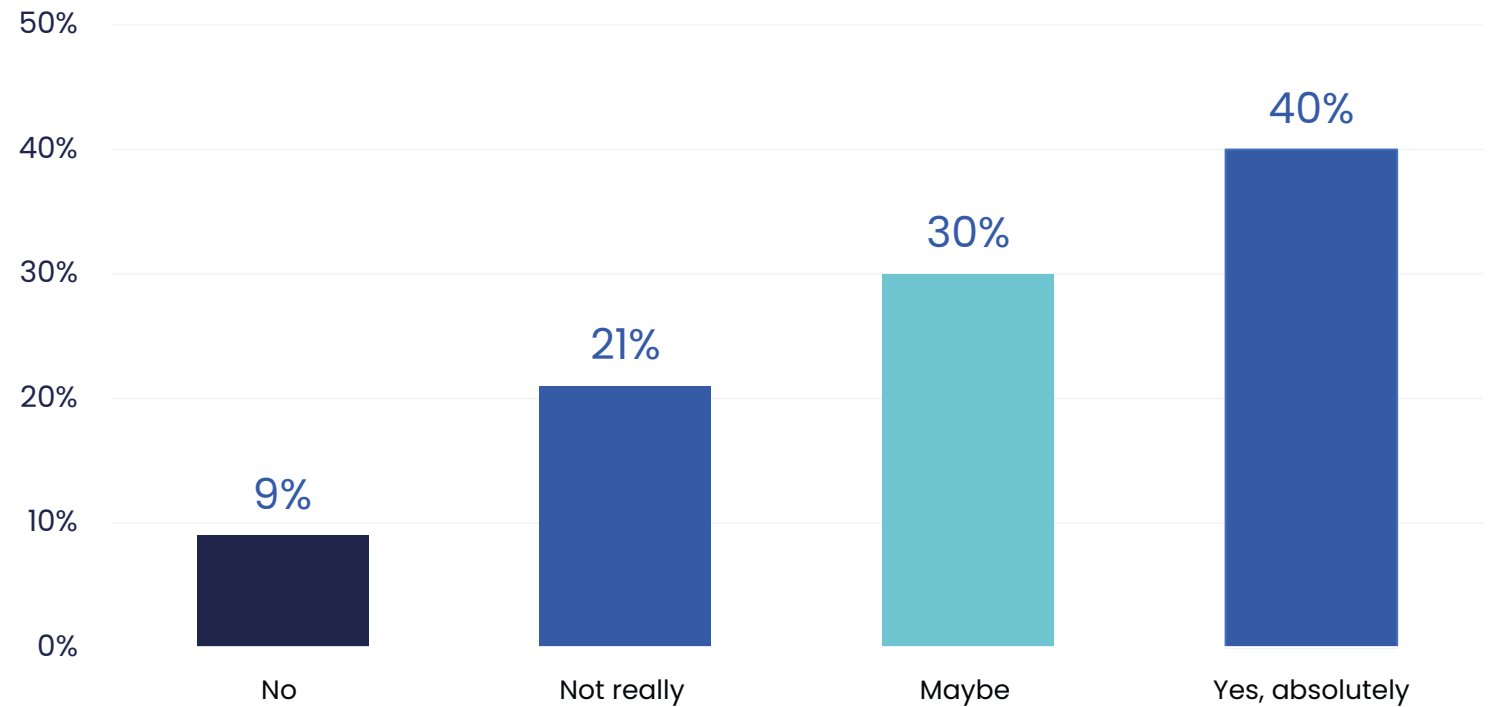
Do you aim to grow your revenue from online programmes in 2023?





Agents' interest in meeting online providers:

Would you be interested to meet dedicated online (only) learning providers at ICEF events?



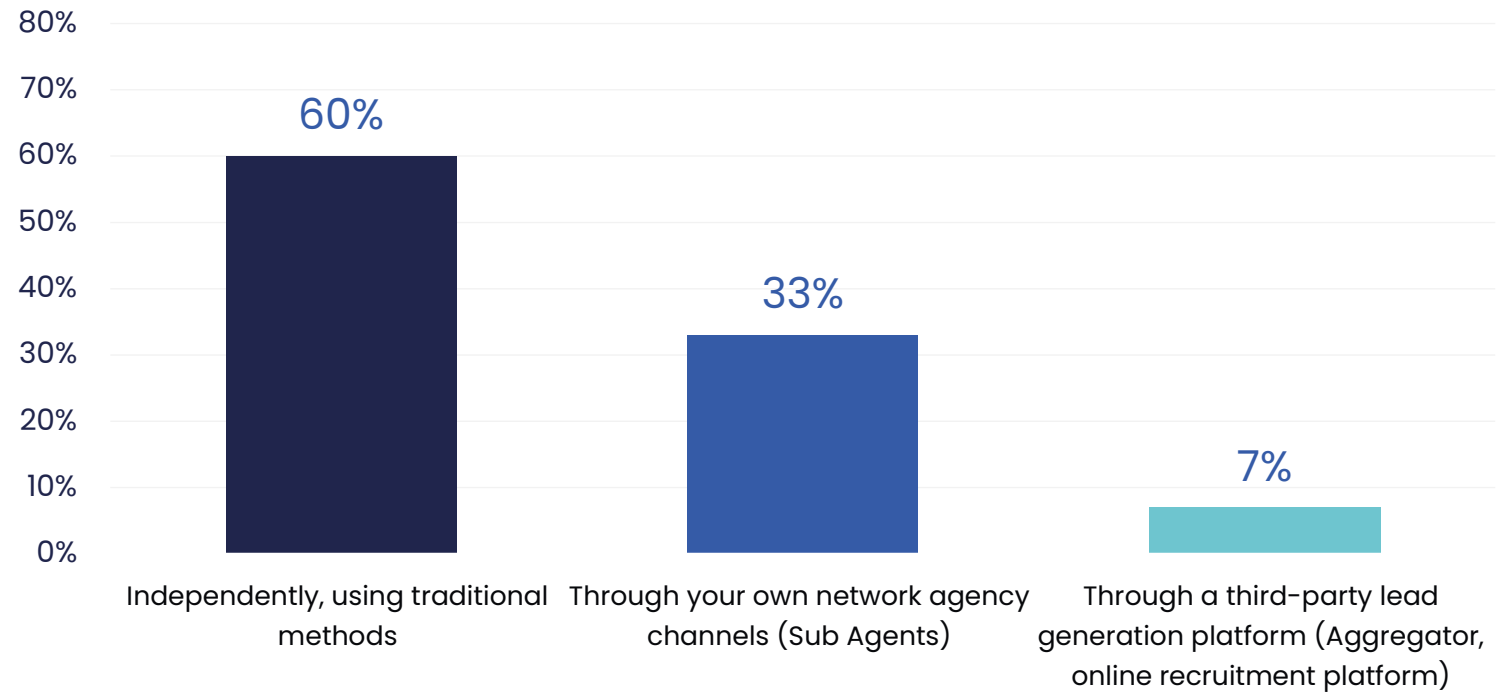


3. Recruitment, Payments & Commission



Student Recruitment Methods

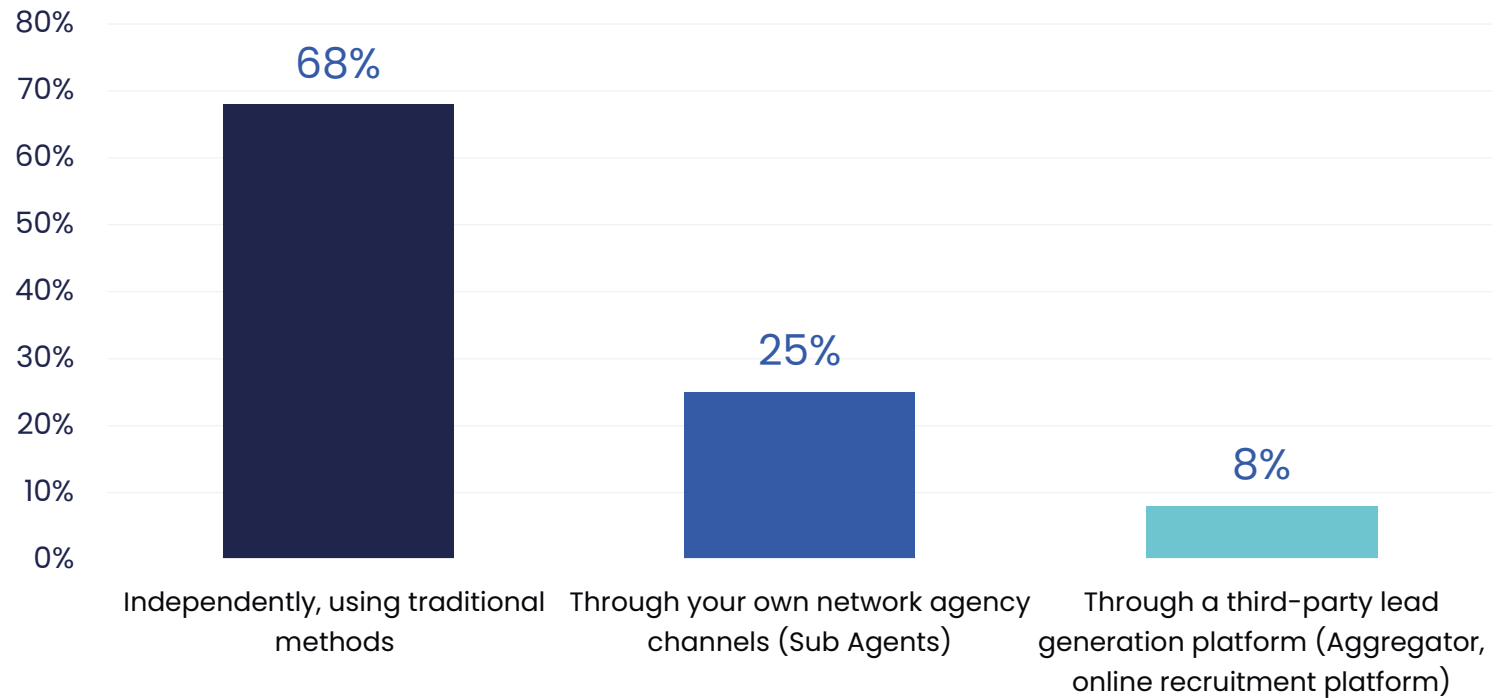
How are you currently **recruiting students** for education programmes?





Application Methods

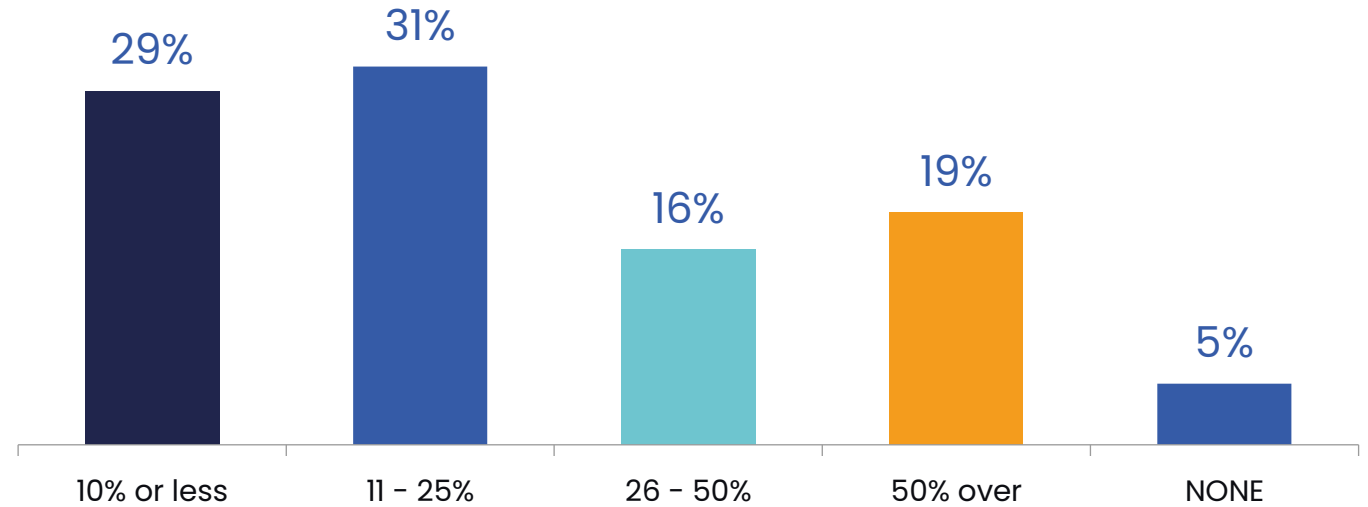
How are you currently **processing applications** for education programmes?





Application Methods

What percentage of your students are sent via Aggregator / online recruitment platform?





Tuition Payment Services

Do you partner with any **payment providers** for tuition payment services?

Yes, I use a payment platform to assist students with payments to institutions



26%

No, I assist my students with the method of payment chosen by the institution



48%

No, I let my students make payment on their own



26%





Tuition Payment Services

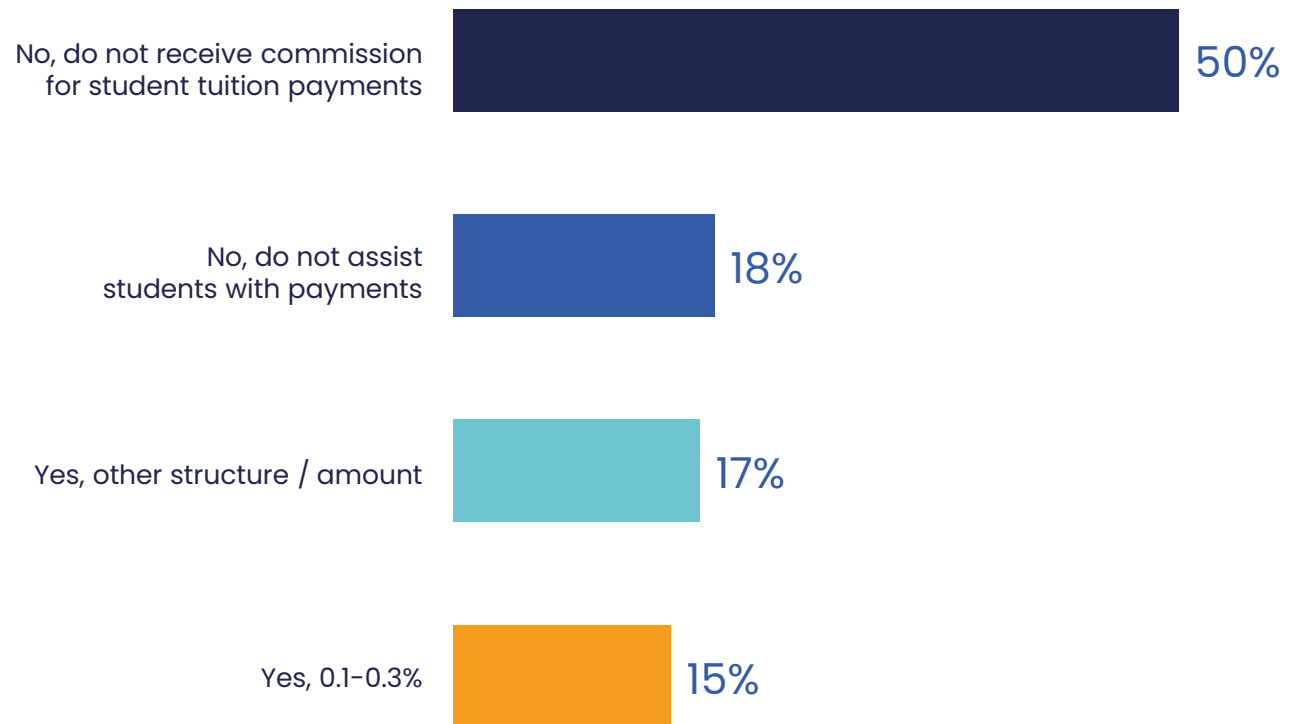
Which platform are you using to assist students with payments to the institutions?





Tuition Payment Commission

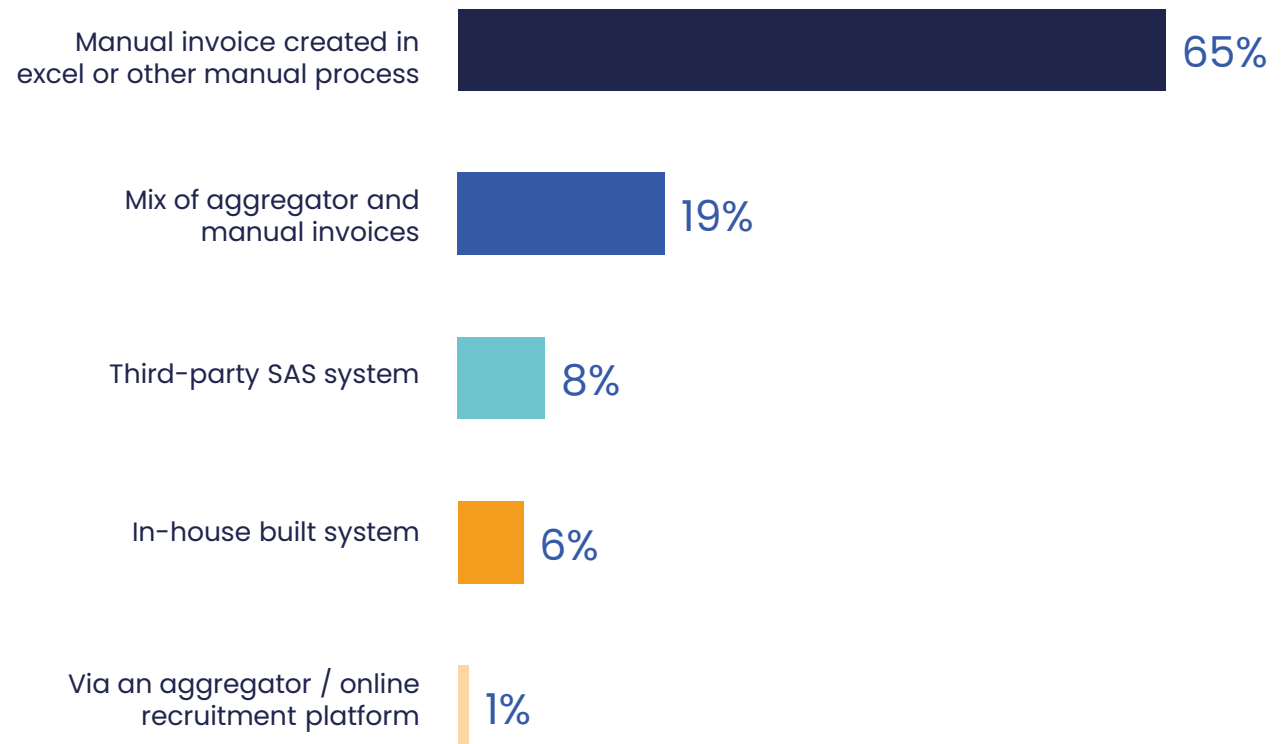
Do you receive commission for **tuition payment services**?





Commission Withdrawal Method

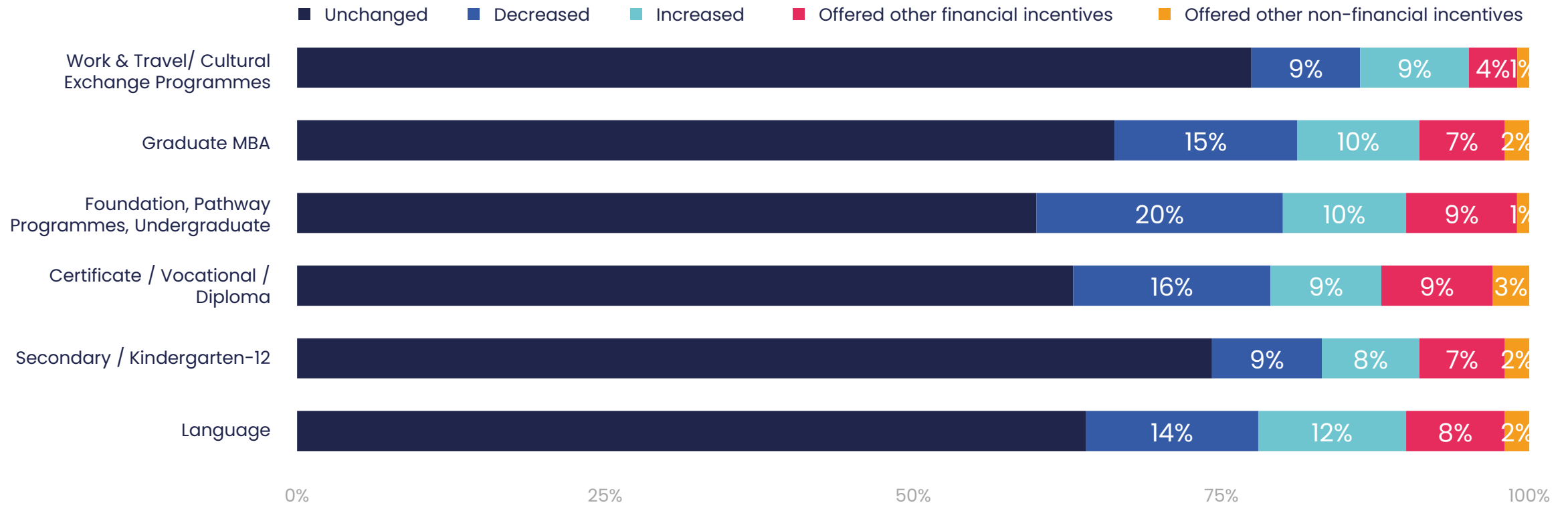
How do you currently **receive commission** from institution partners?





Remuneration changes

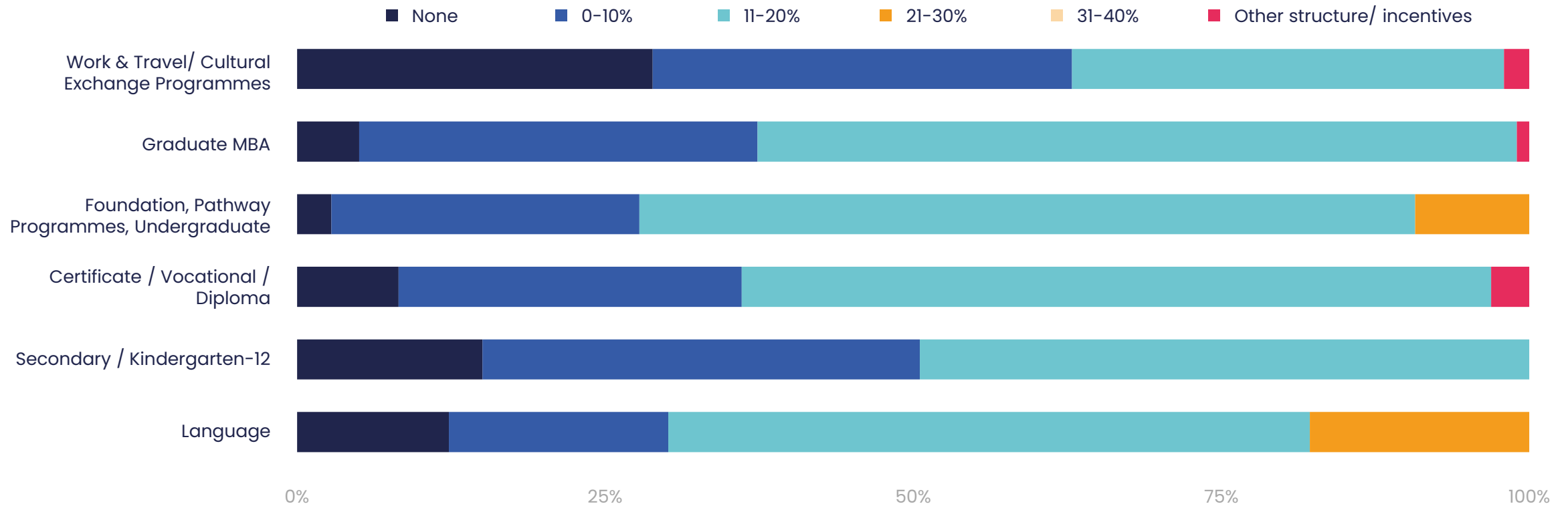
How have commission or payment structures changed over the past 24 months?





Commission rates per course

What commission rates are you currently receiving for the below programmes?





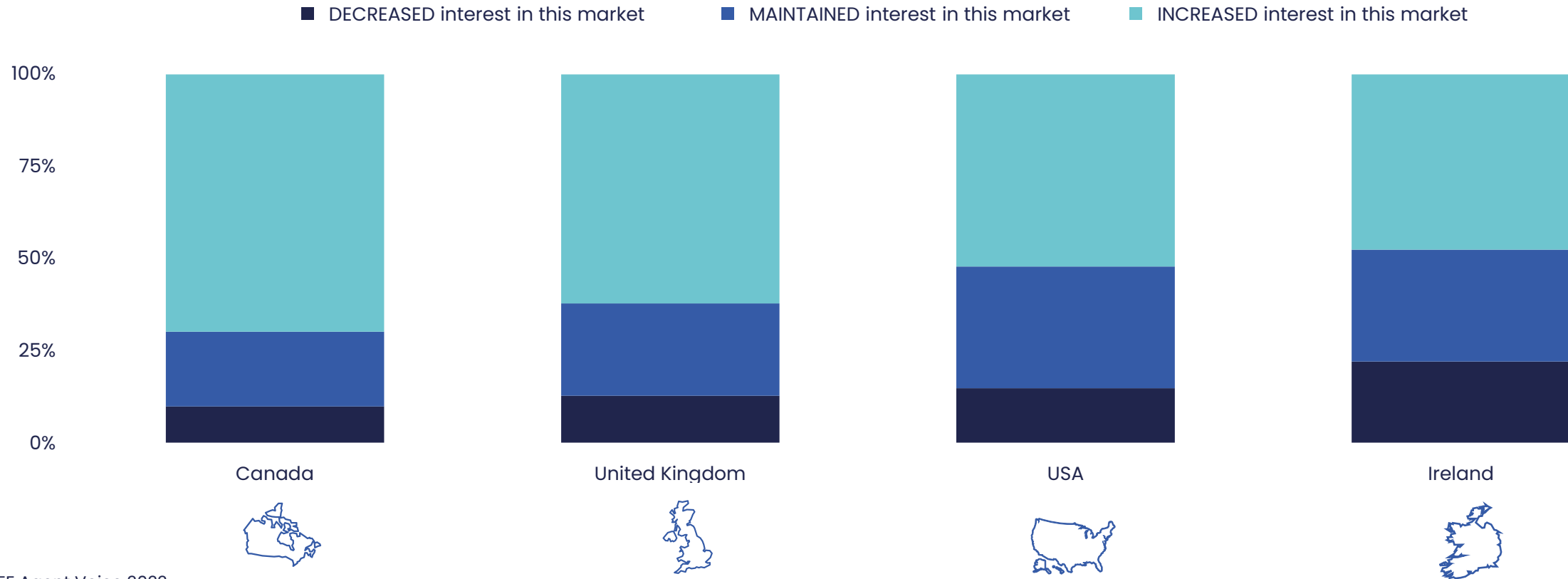
4. Popularity of Study Destinations



Student interest by country

TOP 4
INCREASED
INTEREST

Over the last 2 years, how has students' interest in the following study destination countries changed?

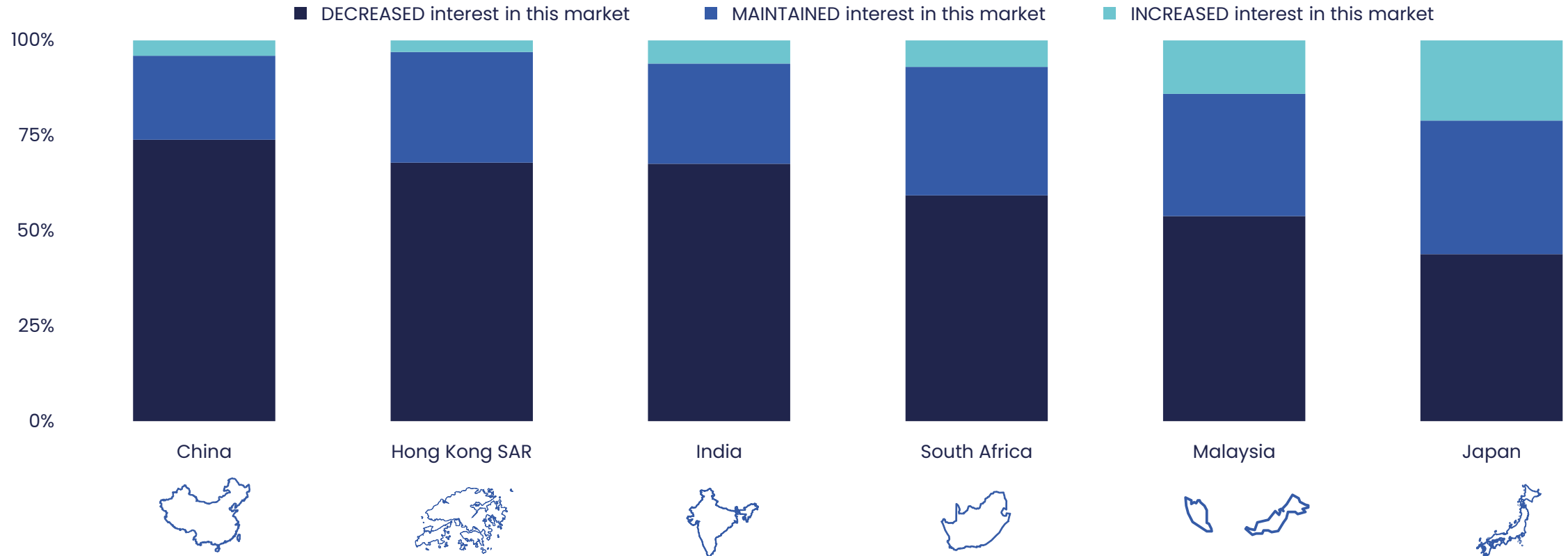




Student interest by country

TOP 6
DECREASED
INTEREST

Over the last 2 years, how has students' interest in the following study destination countries changed?

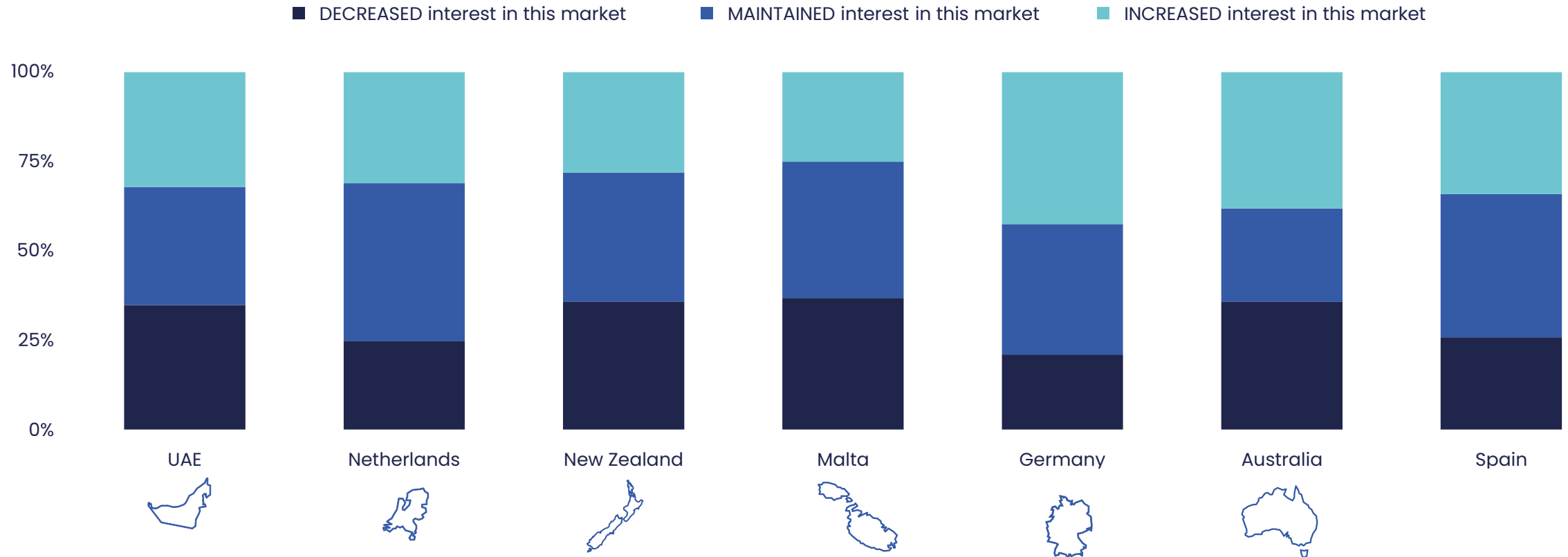




Student interest by country

TOP 6
NEUTRAL
INTEREST

Over the last 2 years, how has students' interest in the following study destination countries changed?

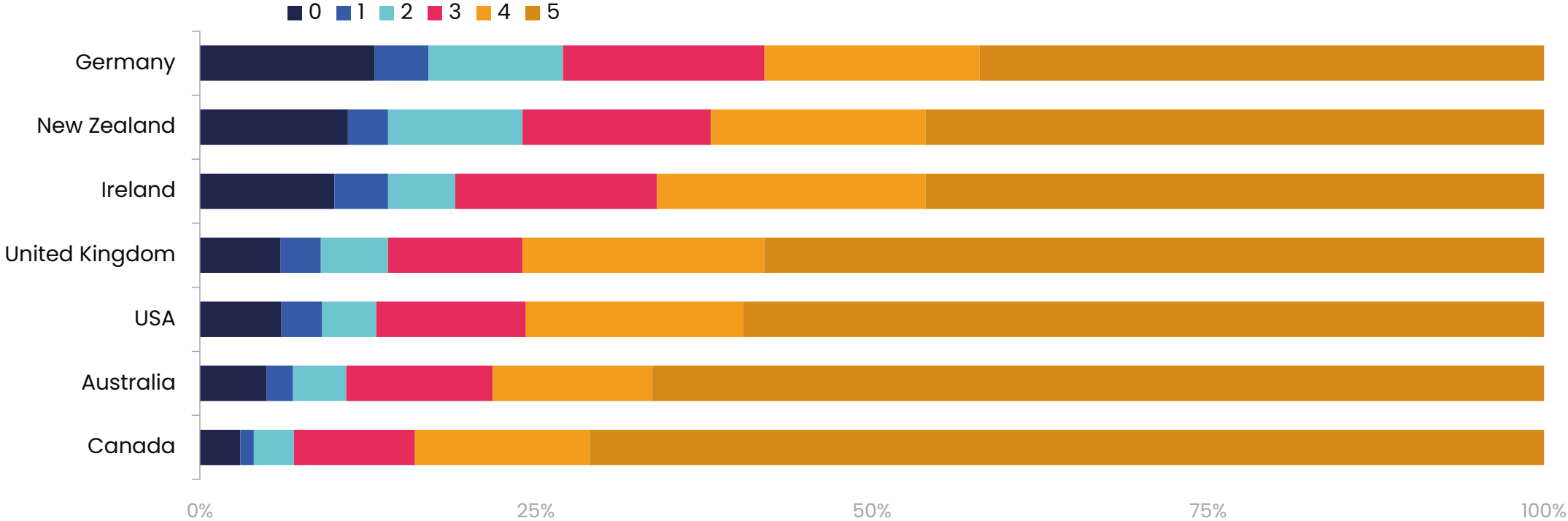


Student destination attraction



TOP 7
INCREASED
INTEREST

What are your students' preferred Work / Study • Work / Career destinations **during study**?

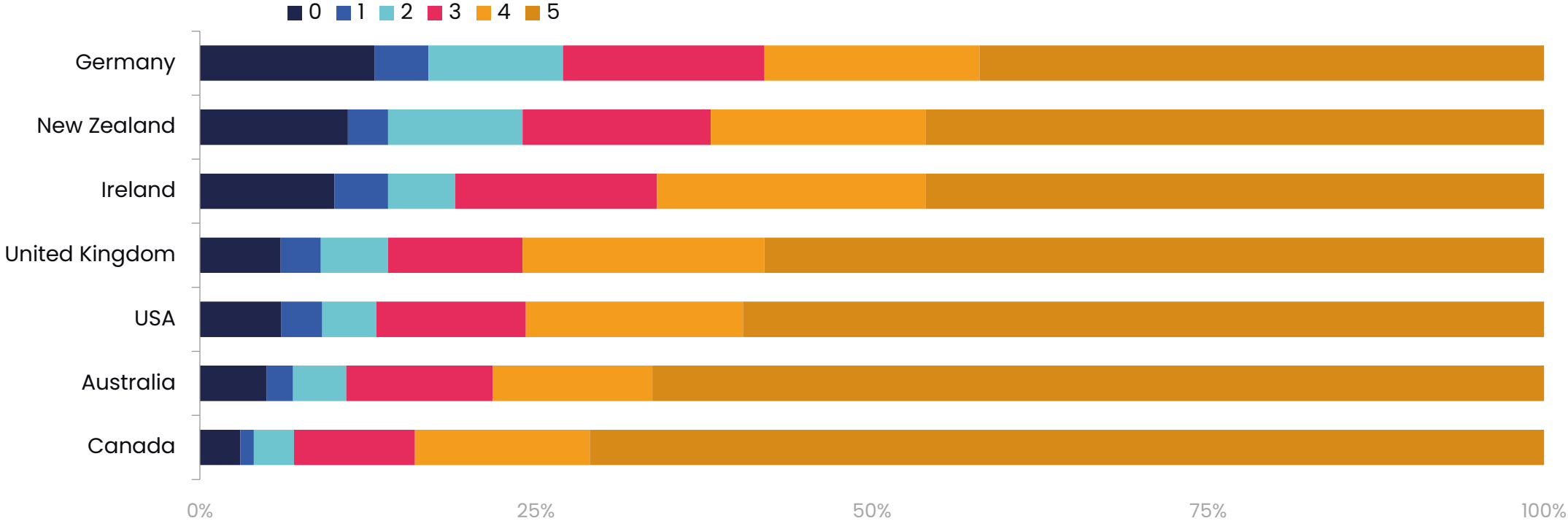


Student destination attraction



TOP 7
INCREASED
INTEREST

What are your students' preferred Work / Study • Work / Career destinations **post-study**?

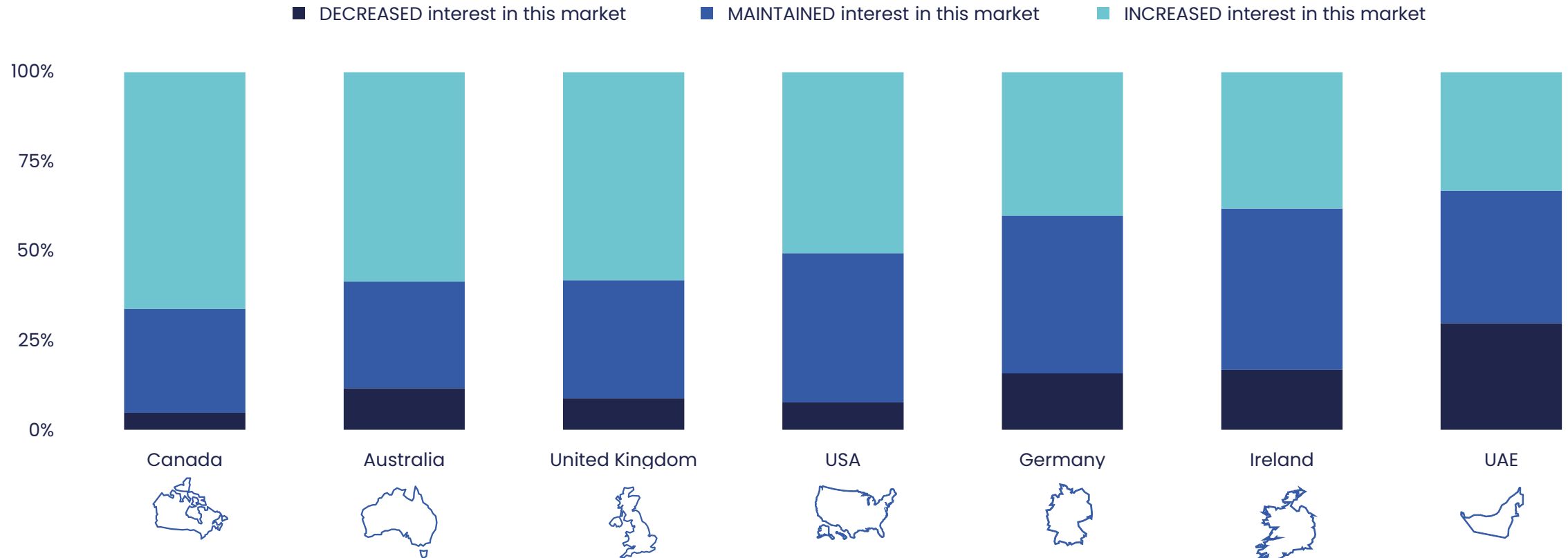




Post-work study opportunities



In which of the following countries have your students obtained post-work study opportunities?

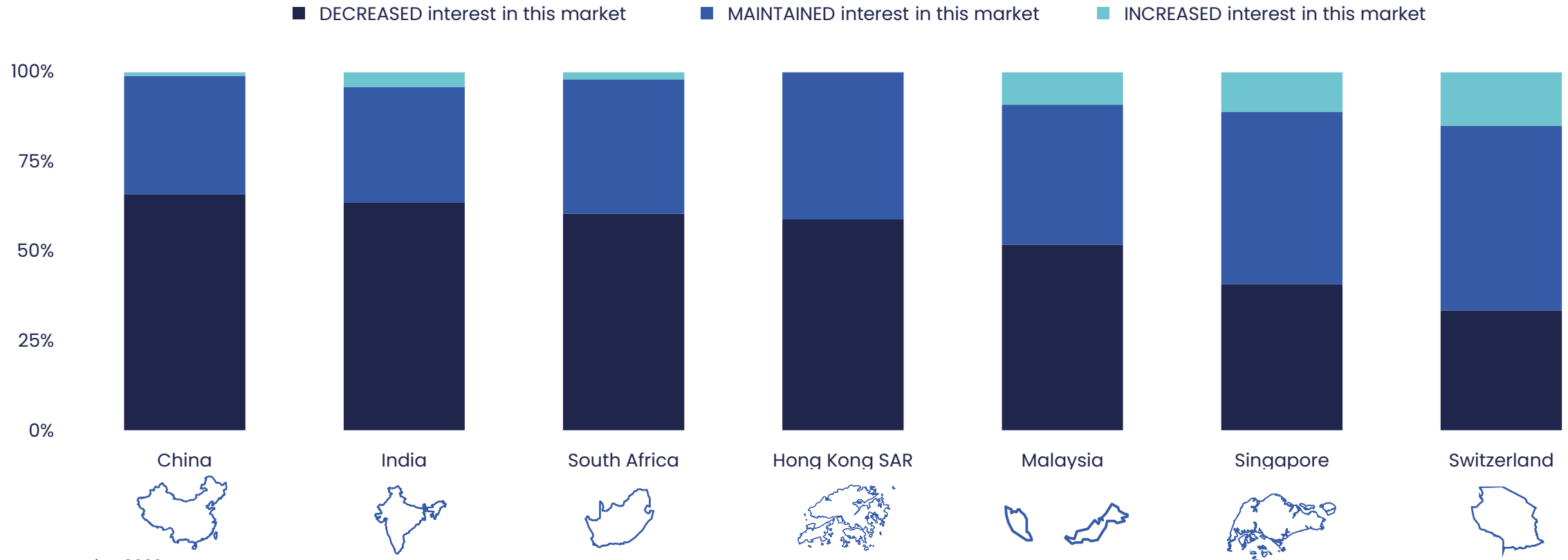




Post-work study opportunities

TOP 7
DECREASED
INTEREST

In which of the following countries have your students obtained post-work study opportunities?





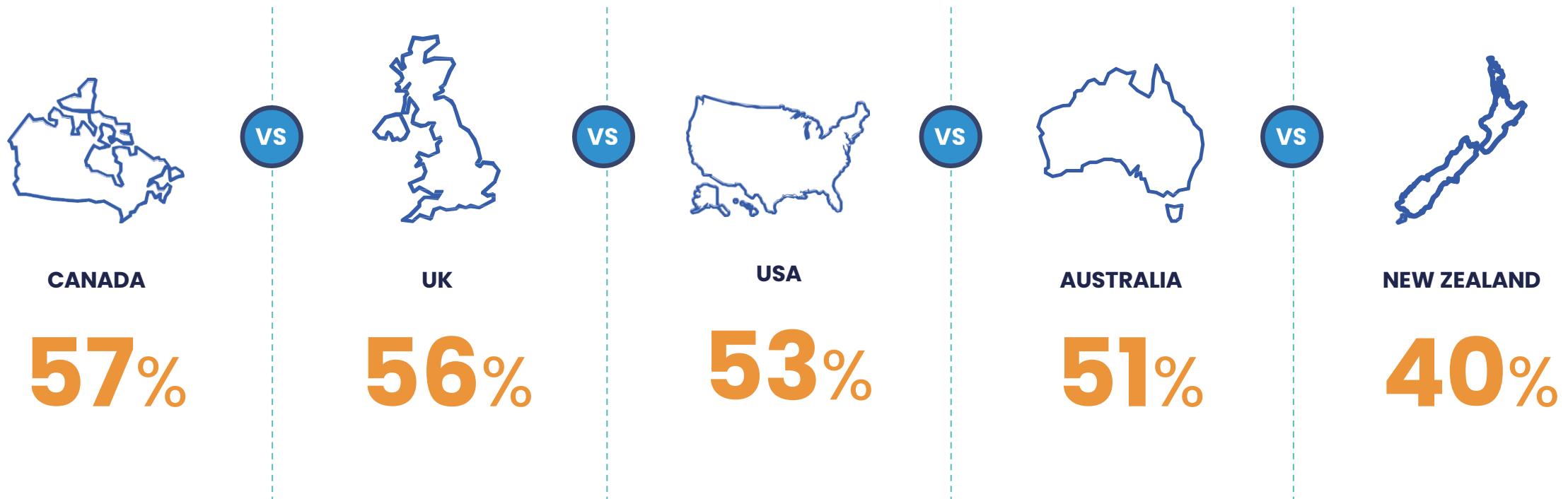
4. Visa Approval Rates



Visa approval

Visa approval rates present a concern globally.

Agent opinions show that on average, only around **50%** of visa applications are likely to be approved. Here are the results for these key markets:

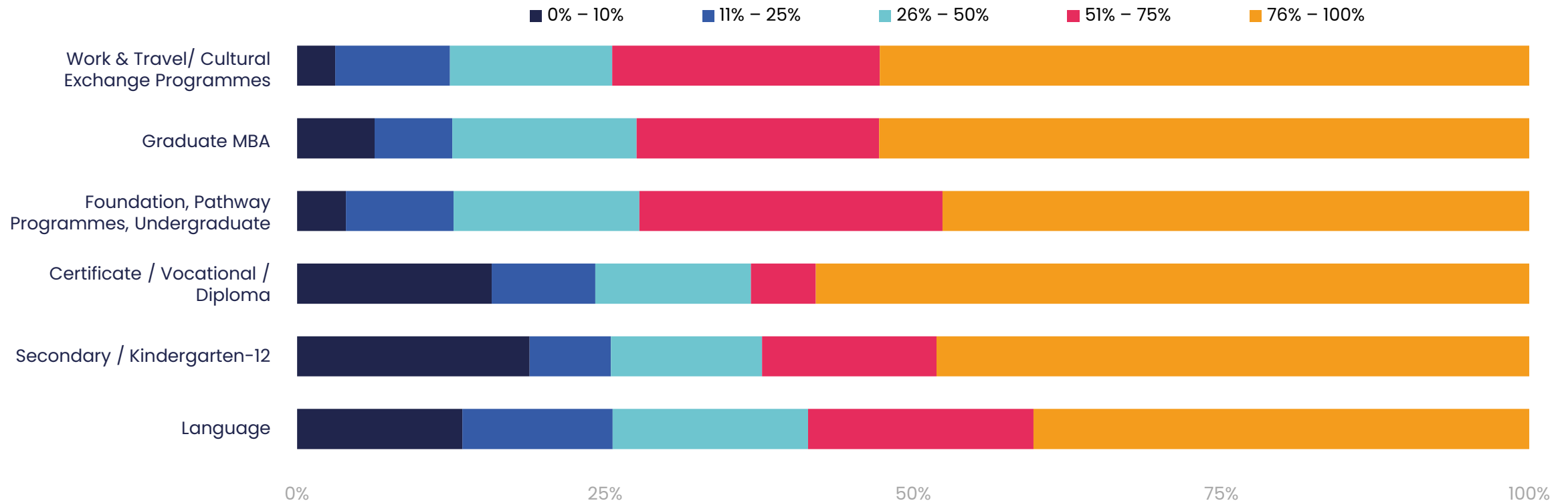


Visa approval rate by country

-Canada



Approximately what percentage of student visa applications are approved?

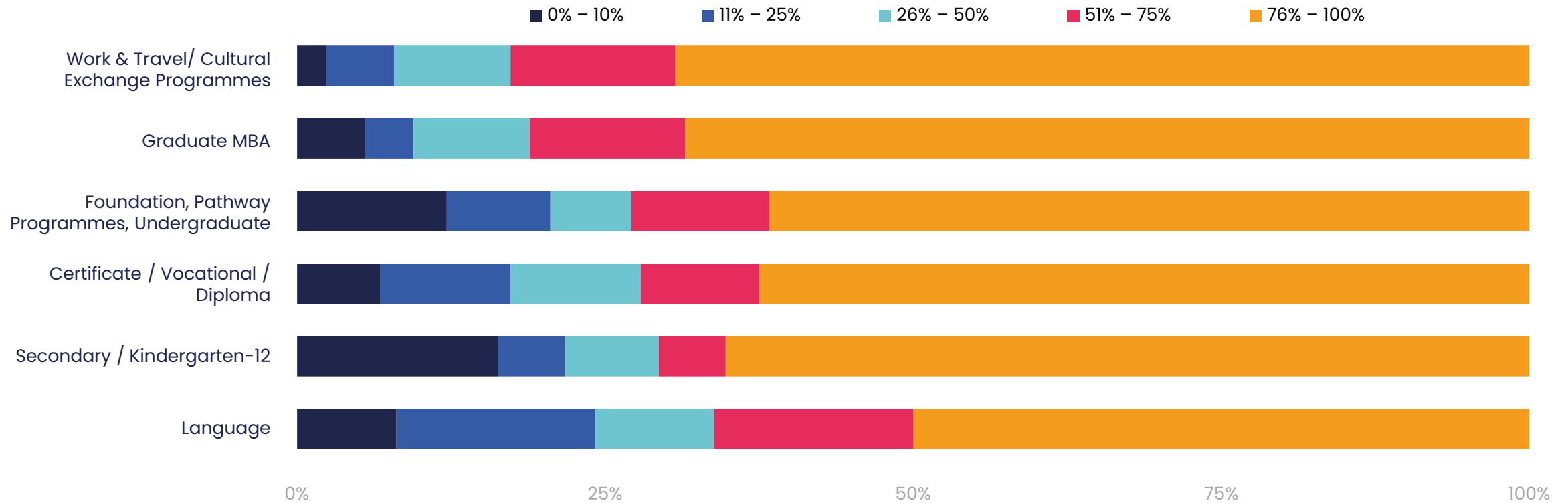


Visa approval rate by country

-United Kingdom



Approximately what percentage of student visa applications are approved?

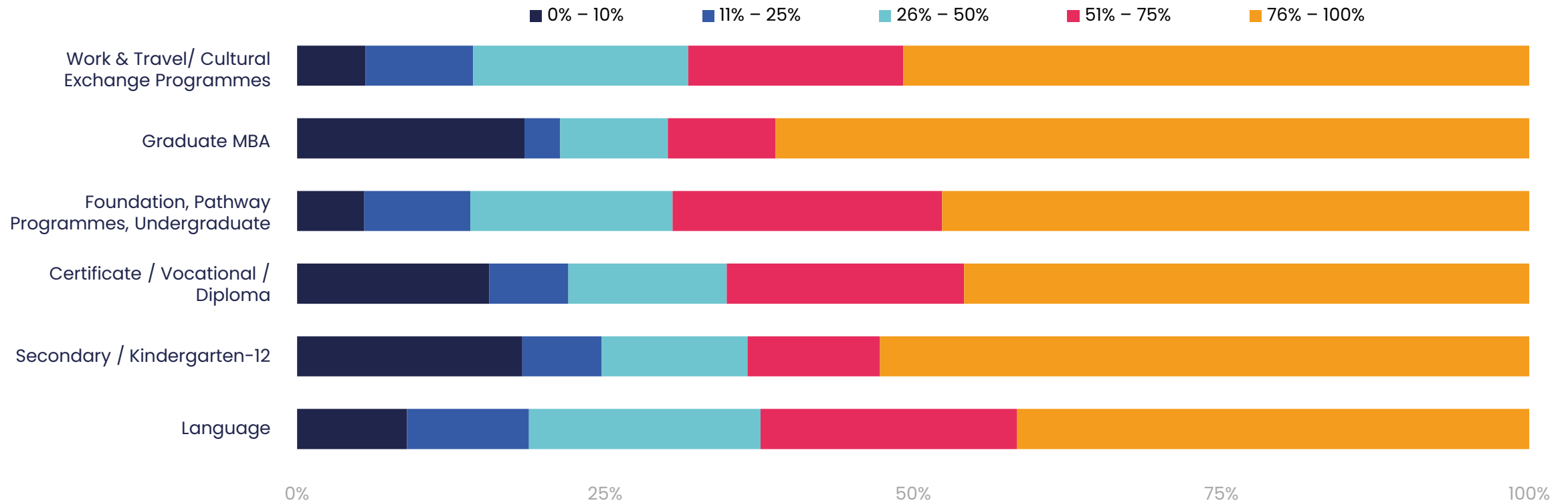


Visa approval rate by country

-USA



Approximately what percentage of student visa applications are approved?

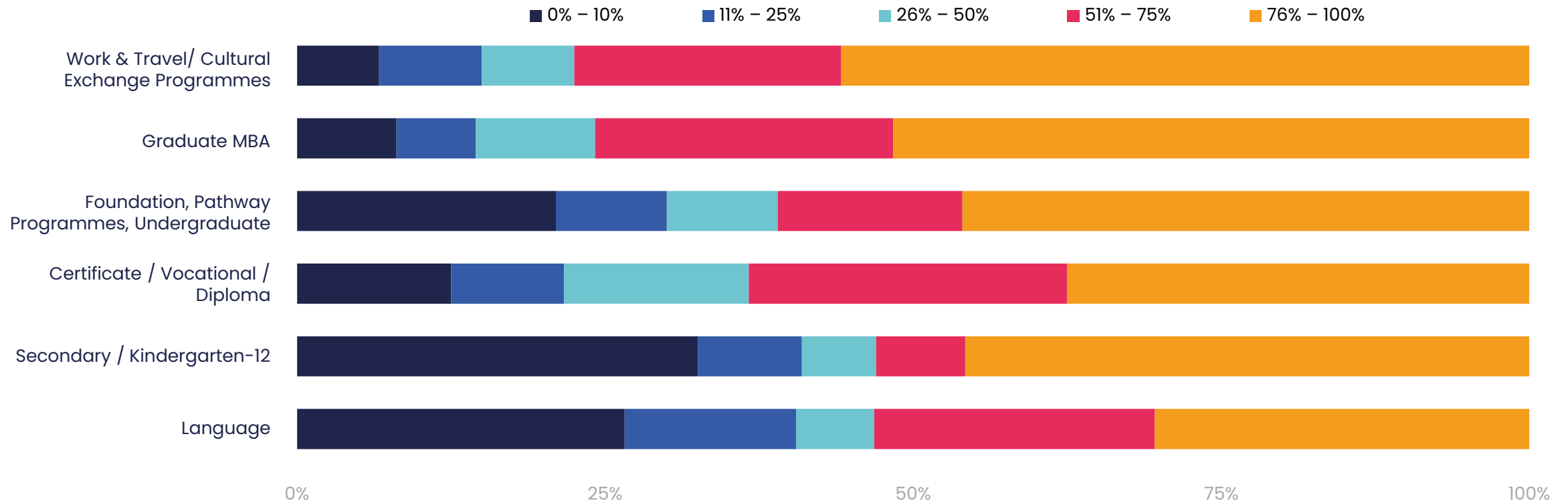


Visa approval rate by country

-Australia



Approximately what percentage of student visa applications are approved?

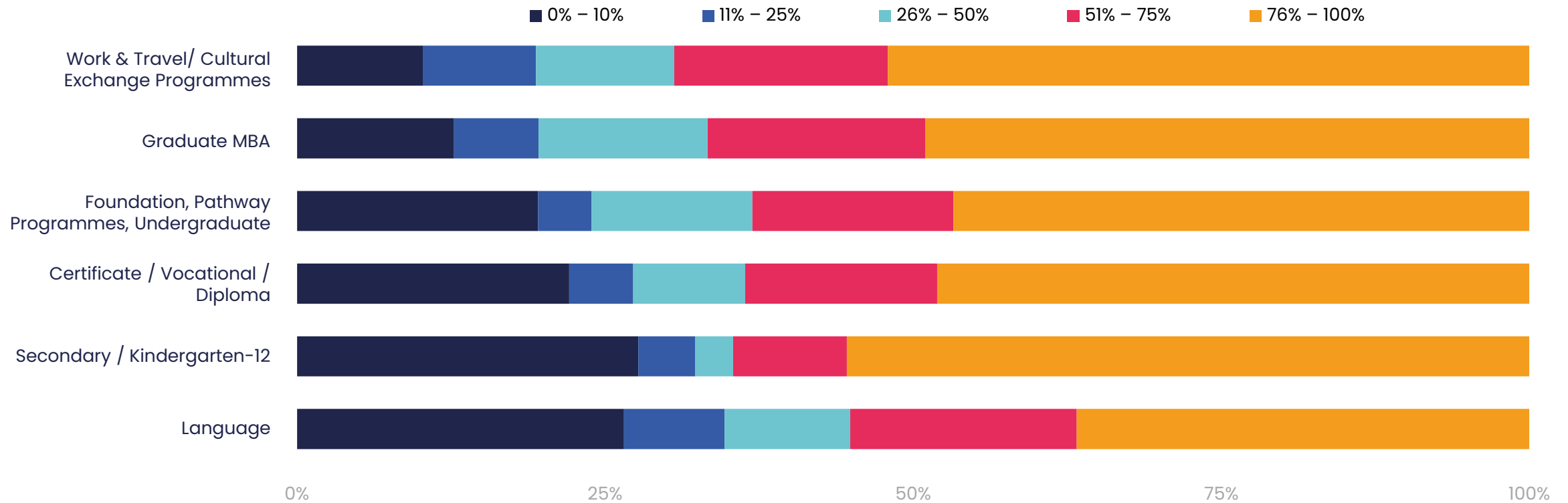


Visa approval rate by country

-New Zealand



Approximately what percentage of student visa applications are approved?





Summary

- 88% of agents have **established new partnerships** with institutions in the last 2 years
- Adoption and promotion of **online/hybrid education** has accelerated (50% - up from 15% in 2020)
- Some countries will bounce back sooner than others, with opportunities for newer destinations to steal market share
- Levels of **communication** between agents and partners continues to rise!
- **Quick response, and fast application processing** seen as key driver for new enrolments
- **Visa approval rates** a concern, globally



Thank you

Any questions, comments?

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