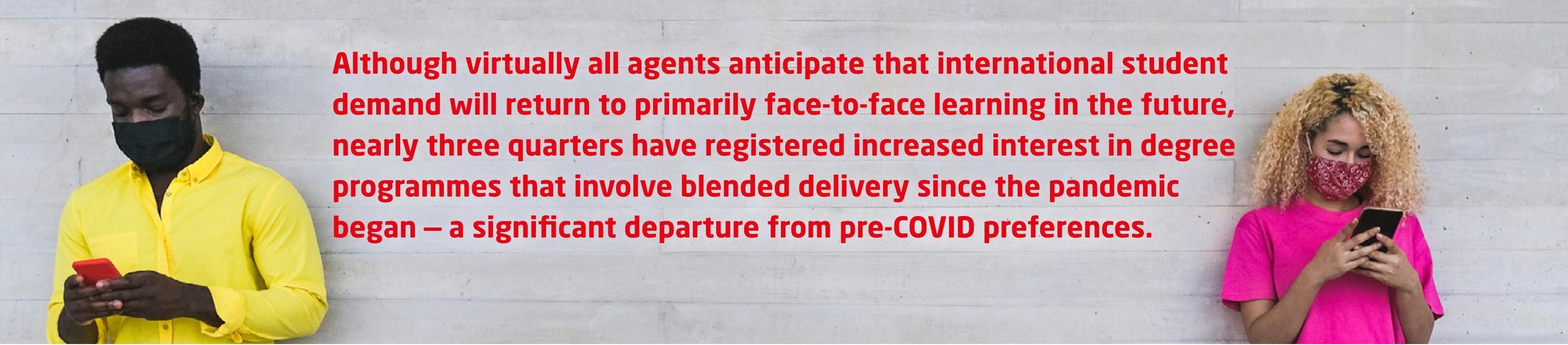


# **Agent Perspectives on International Education in the Context of COVID-19**

**INTO University Partnerships | November 2021**





**Although virtually all agents anticipate that international student demand will return to primarily face-to-face learning in the future, nearly three quarters have registered increased interest in degree programmes that involve blended delivery since the pandemic began – a significant departure from pre-COVID preferences.**

Four out of five agents (80%) think that some aspects of study abroad have shifted as a result of the global COVID-19 pandemic. Specifically, 65% think students and parents now increasingly seek scholarships and other forms of financial aid as they consider their options, and 61% think students and parents are now far more focused on career outcomes. This feedback is consistent across regions.

Globally, 45% of agents report that they have seen some level of change in the types of subjects students are interested in pursuing while studying abroad. The subjects where interest was found to be the strongest are computer science, including related specialties such as robotics and cyber, followed by data science and analytics. Of note, these subjects are linked to in-demand jobs.

Across regions, around half or more of agents report to be somewhat familiar with micro-credentials. Familiarity is lowest among agents in Latin America. When it comes to students travelling abroad to complete non-degree credentials, 50% of agents believe that students will be somewhat interested in doing so, while 16% believe students will be very interested.

Looking ahead, 27% of agents identify job opportunities in study destination countries as the factor that will have the greatest impact on study abroad decision-making in the next five years. A further 21% believe the immigration policies of destination countries will have the greatest impact. It's worth noting that, for agents based in China, Hong Kong and Macau, 31% think the greatest influencing factor will be future pandemics, and 25% think it will be geo-political relations.

Regarding projected international student volumes, 81% of agents expect to send more students to the UK over the course of the 2021-22 academic year. Far fewer expect an increase in the number of students they will send to the USA and Australia — 59% expect to send more students to the USA, and 38% expect to send more students to Australia.

Agents based in China, Hong Kong and Macau continue to show concern about the way the USA has managed the crisis, as well as how welcoming and safe it is for international students. Across regions, agents generally feel more negative toward Australia's border closures.

# 1,126 agents completed our survey in November 2021

The survey showed that agents are most positive towards the UK with regard to how its government has handled the pandemic. The UK also performed well in terms of how open the borders have been to international students, along with its welcome and safety procedures. While attitudes towards the key study abroad destinations are influenced by the regions where agents are located, there is evidence to support that agents across all regions have generally positive sentiments towards the UK.

Region	Number of responses	Proportion of total
China, HK and Macau	219	19%
East Asia	387	34%
Eastern Europe & Central Asia	168	15%
Middle East & Africa	173	15%
South Asia	94	8%
The Americas	85	8%
<b>Total</b>	<b>1126</b>	<b>100%</b>

81%

expect to send more students to the UK over the course of 2021-22

95%

believe that student demand will return to mainly face-to-face delivery

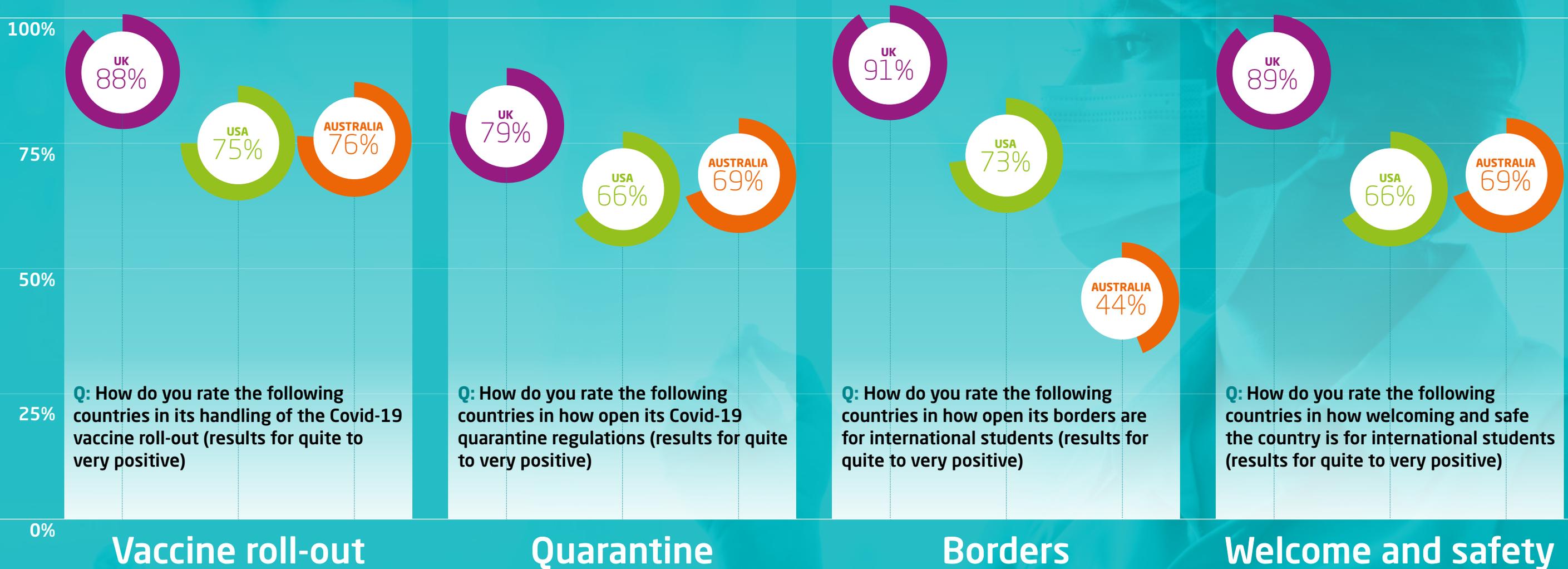
72%

have seen an increase in the number of students interested in blended delivery since the start of the pandemic

80%

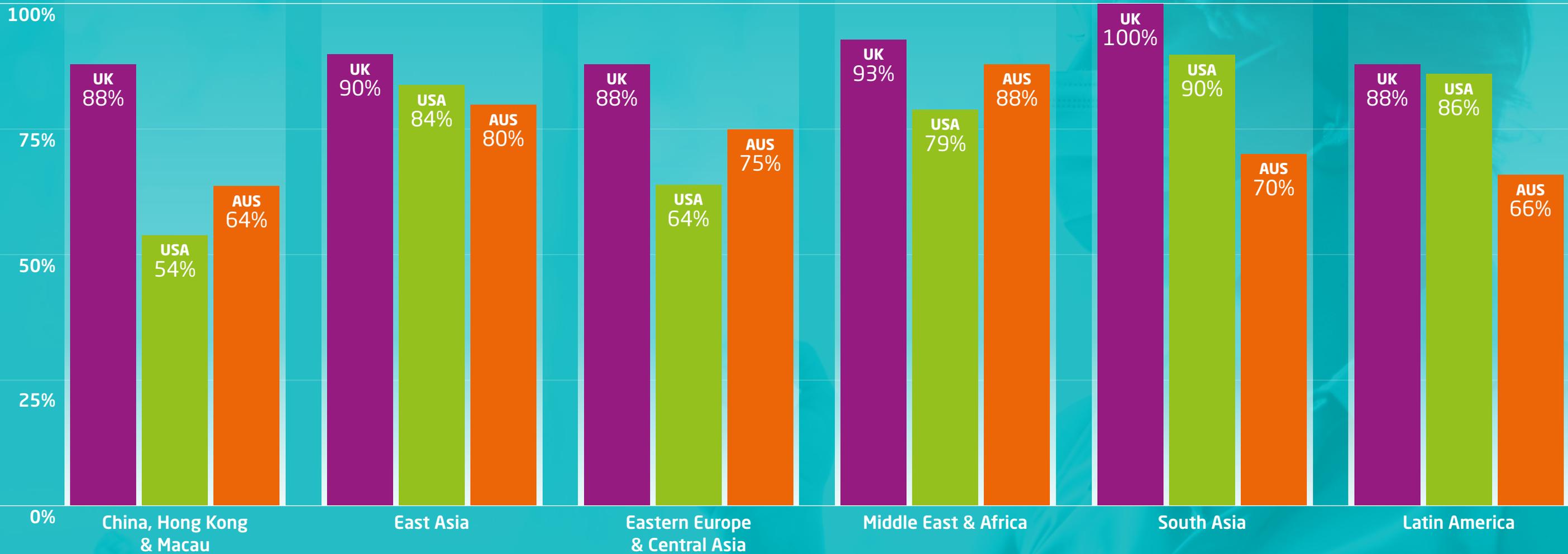
think that some aspects of study abroad have shifted as a result of the pandemic

# Agent views on host countries



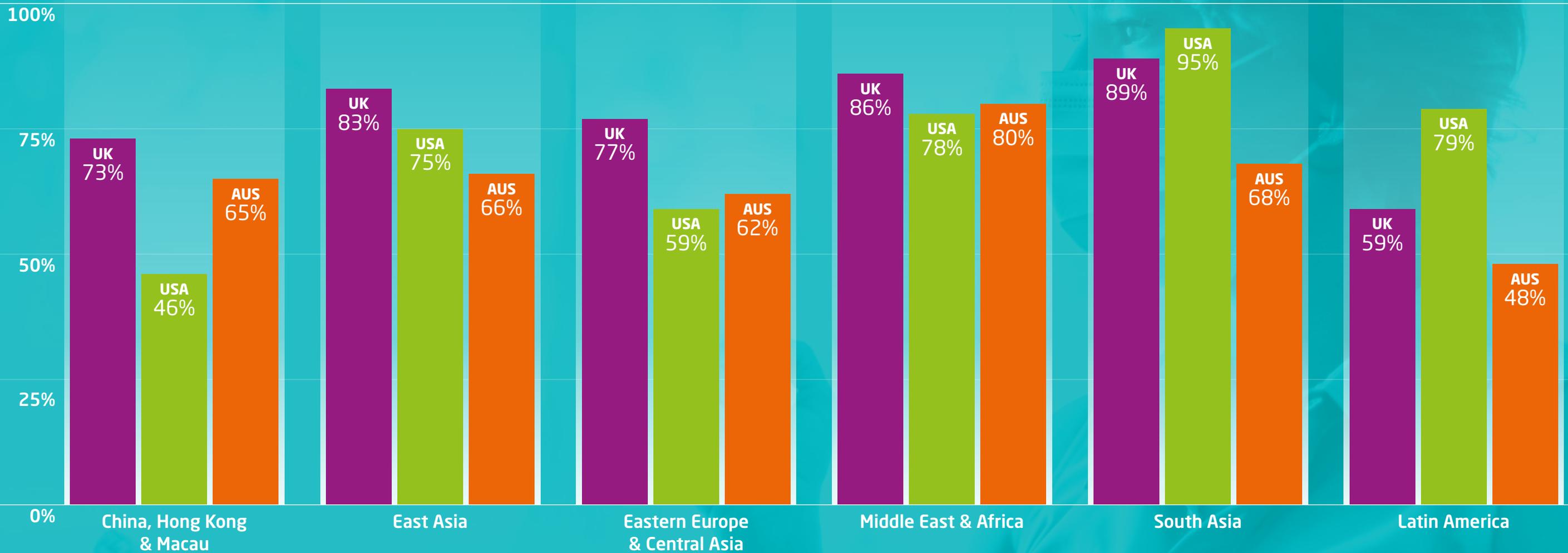
# Regional results

How well are countries handling the Covid-19 vaccine roll-out?



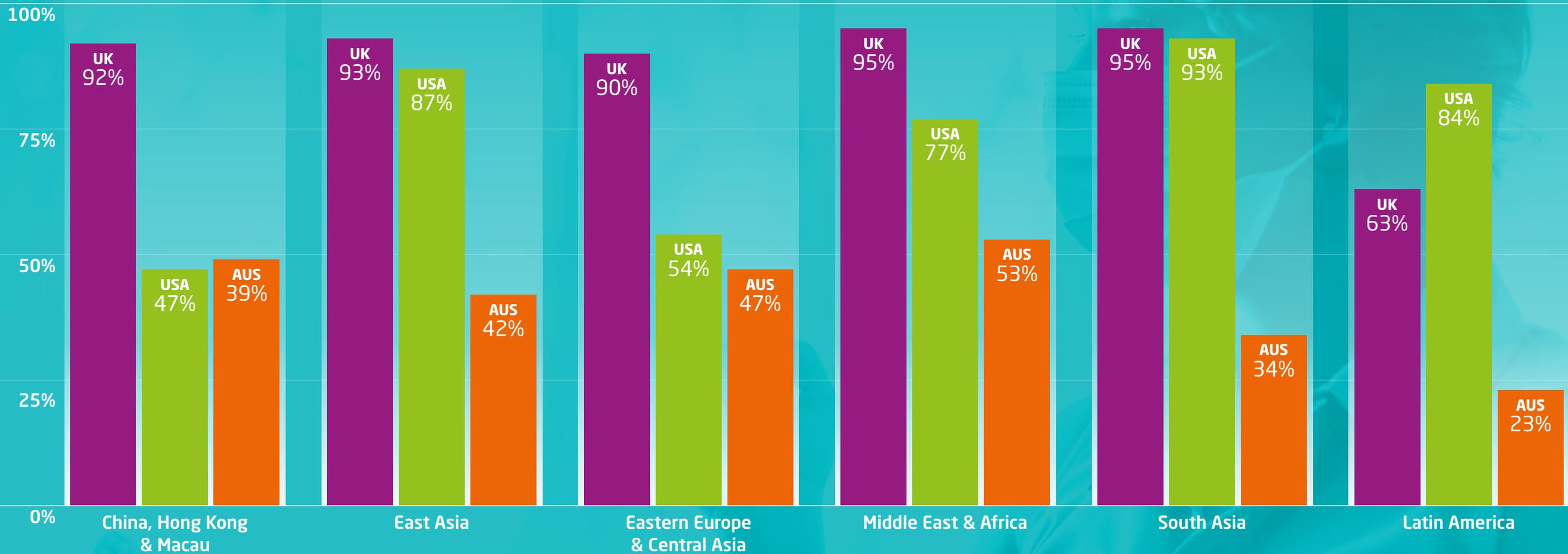
# Regional results

How well are countries managing their quarantine regulations?



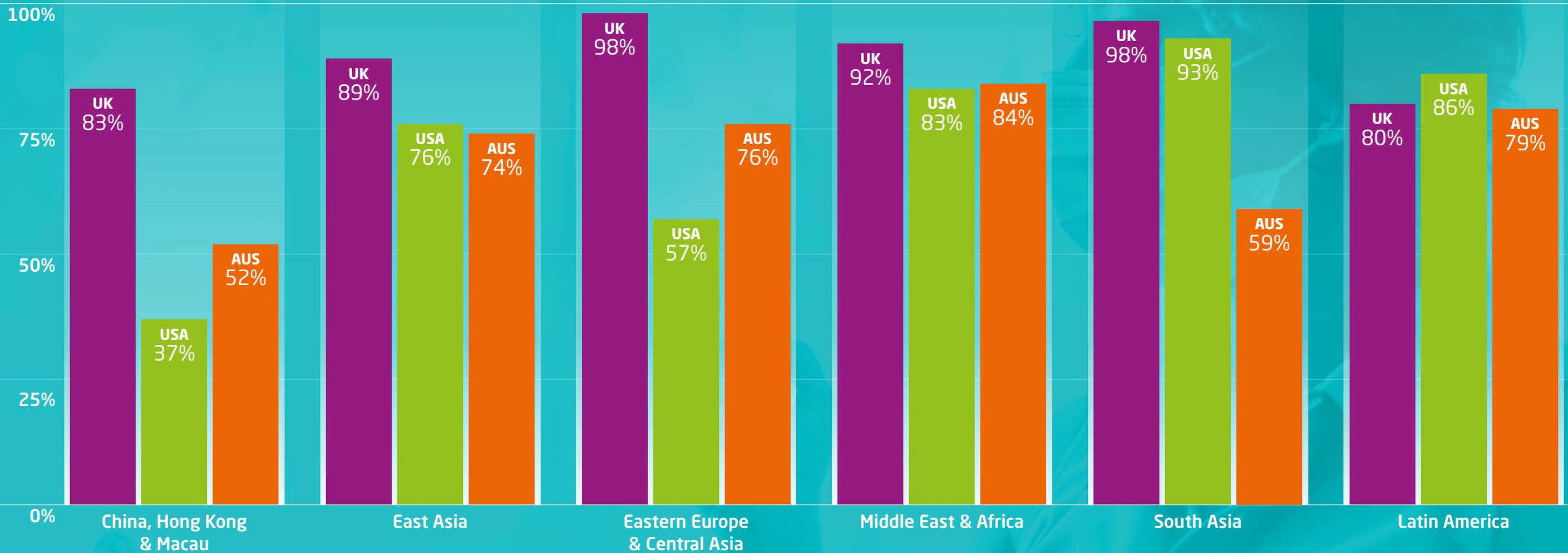
# Regional results

How open are borders are for international students?

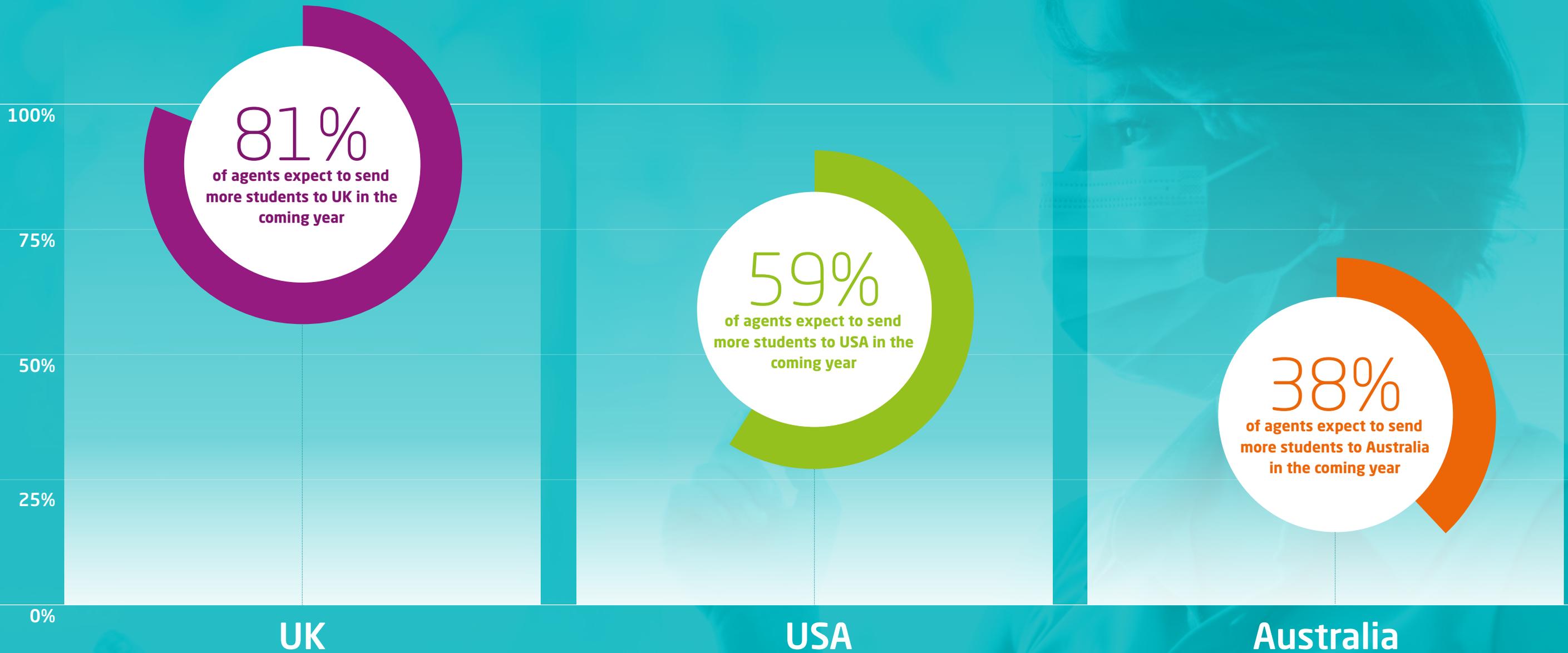


# Regional results

How welcoming and safe are countries for international students?

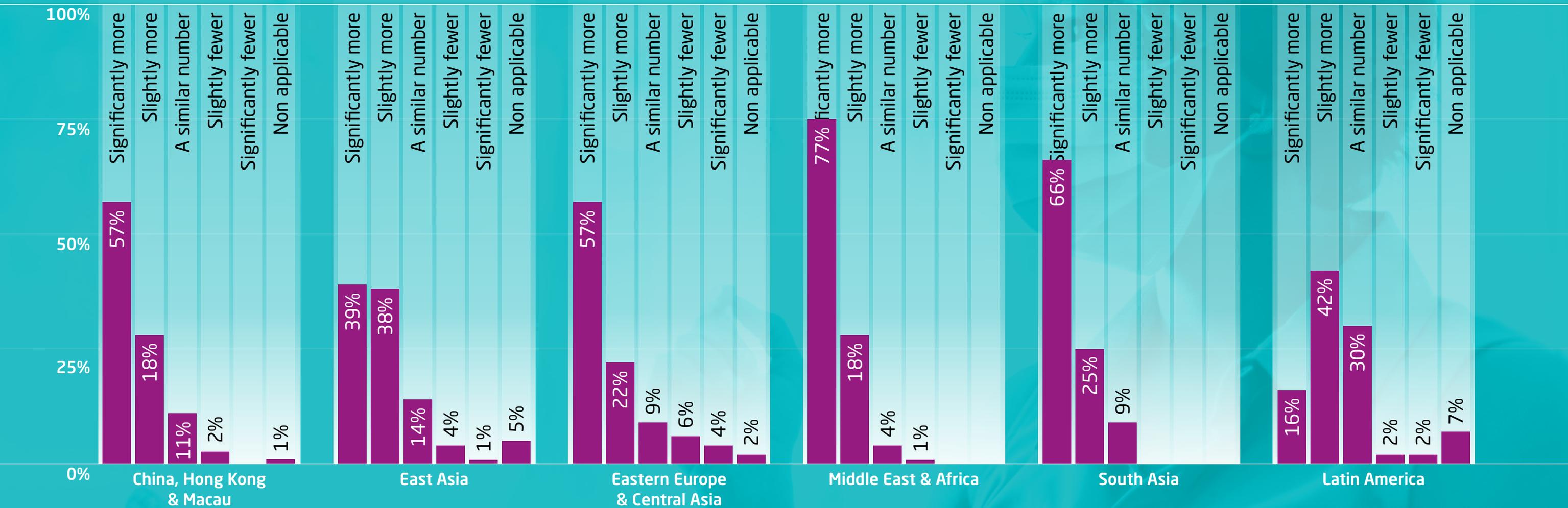


# Which countries can expect more students in the coming year compared to 2020-21?



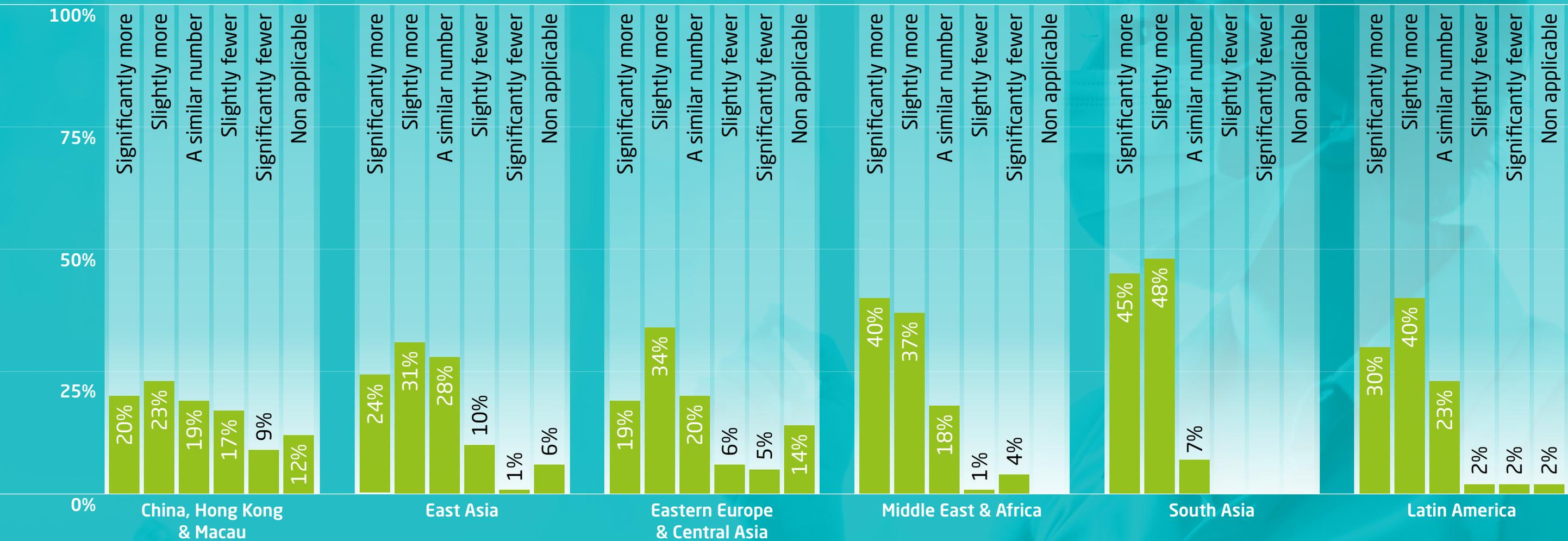
# Regional results

How many students can the UK expect in the coming year compared to 2020-21?



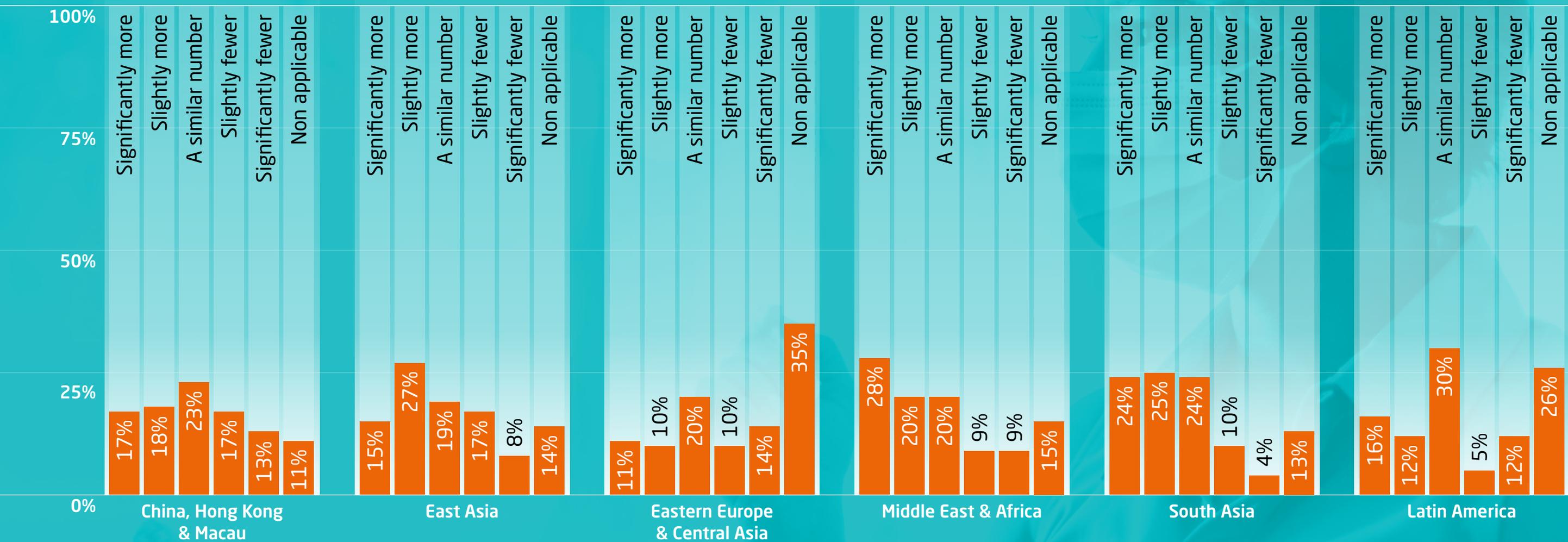
# Regional results

How many students can the USA expect in the coming year compared to 2020-21?



# Regional results

How many students can Australia expect in the coming year compared to 2020-21?



# Changes in subject choices

45%

of agents have seen some level of change in the types of subjects students are interested in studying abroad

China, Hong Kong & Macau

47%

East Asia

42%

Eastern Europe & Central Asia

37%

Middle East & Africa

39%

South Asia

48%

Latin America

32%

# Changes in subject choices

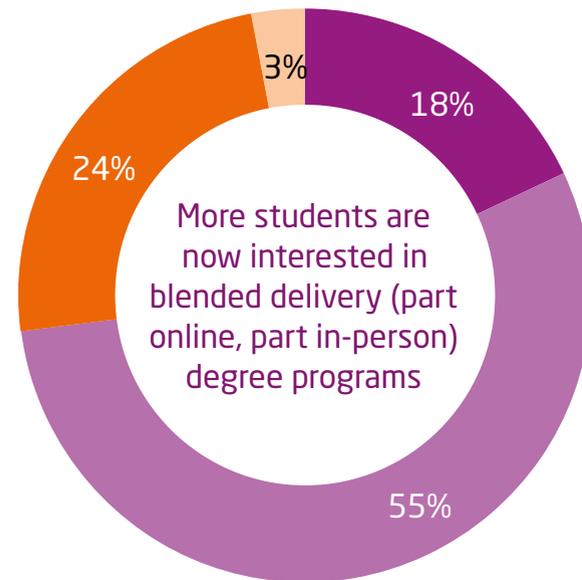
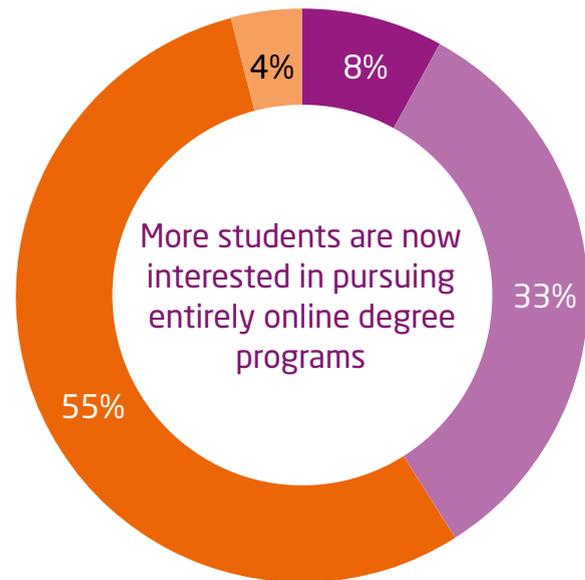
What subjects are students interested in?



*Agents report growing interest in degree subjects linked to 'in-demand' jobs such as computer science and specialisms (eg robotics, AI and cyber) and data science/data analytics.*

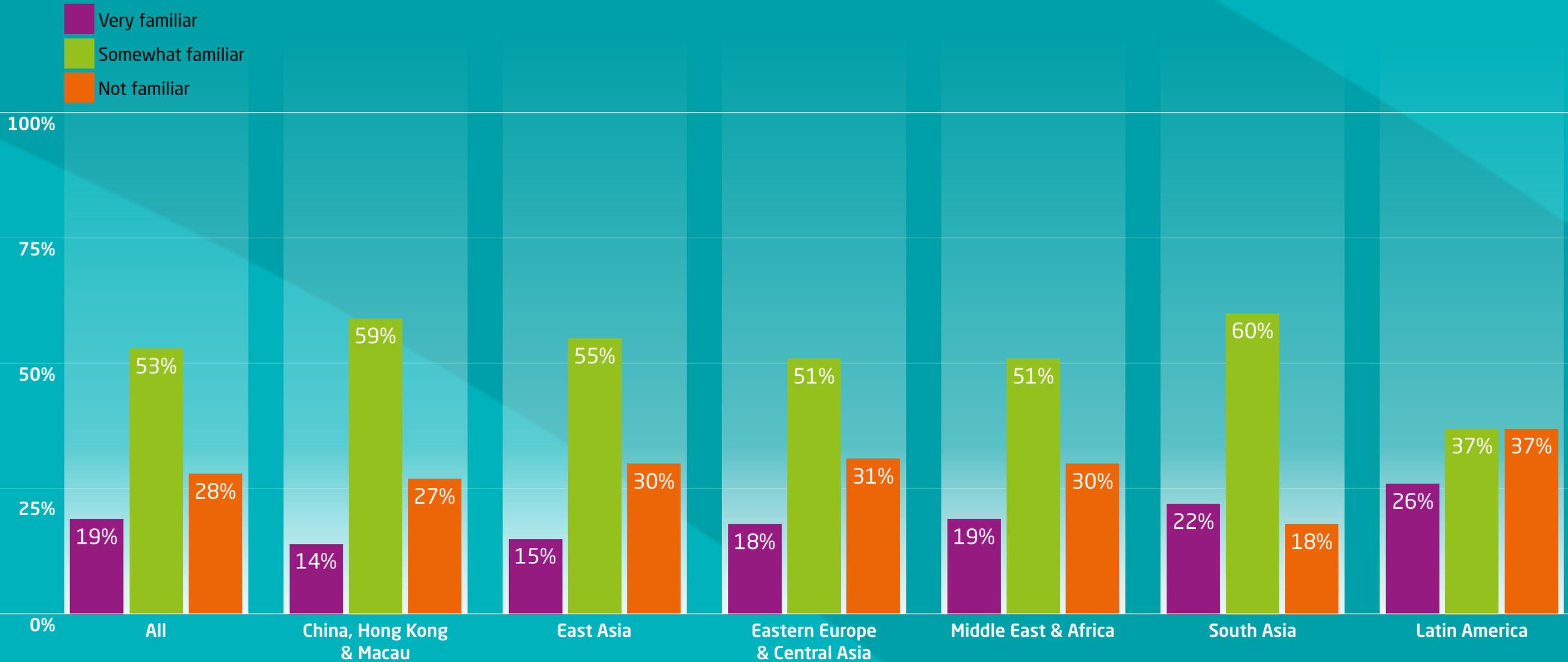
# Changes in types of learning delivery

## Degree programs



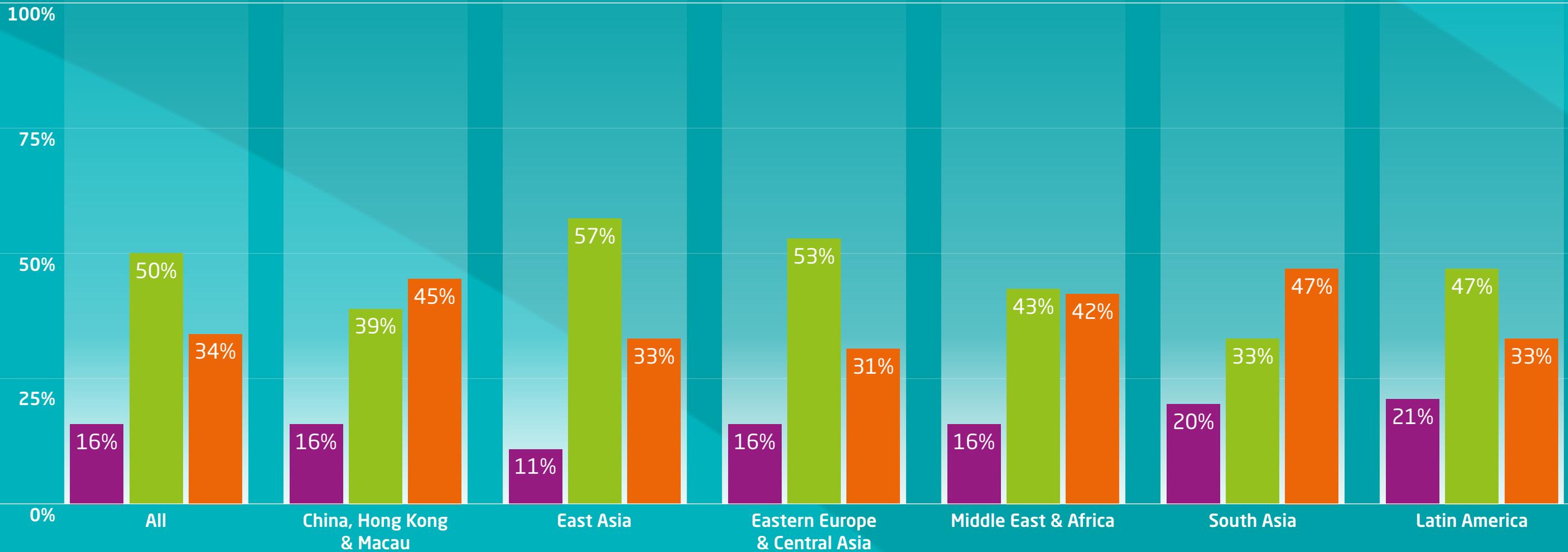
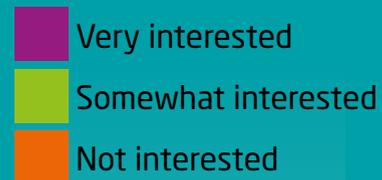
# Non-degree credentials

Agent familiarity with non-degree/micro-credentials/certificates



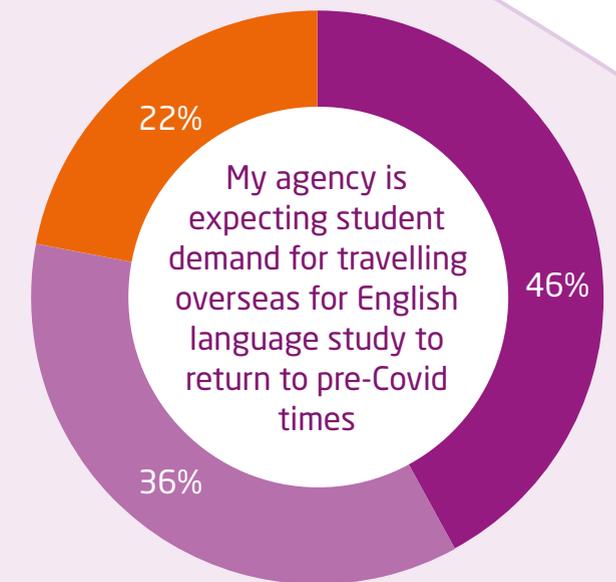
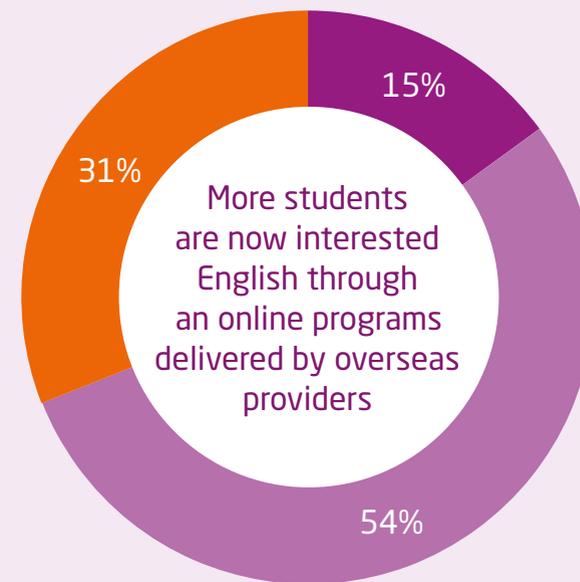
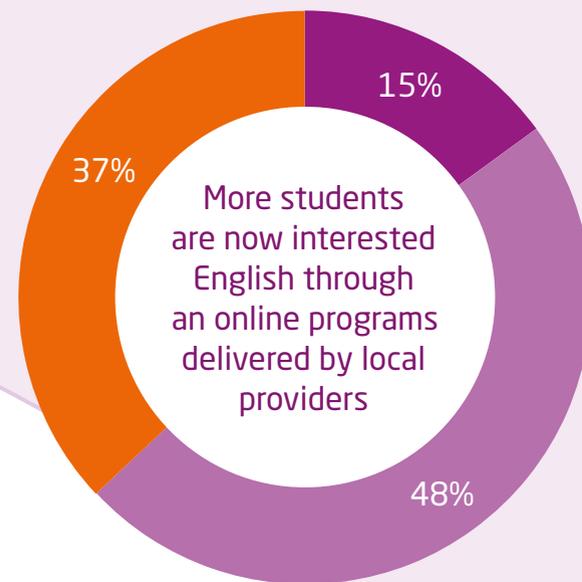
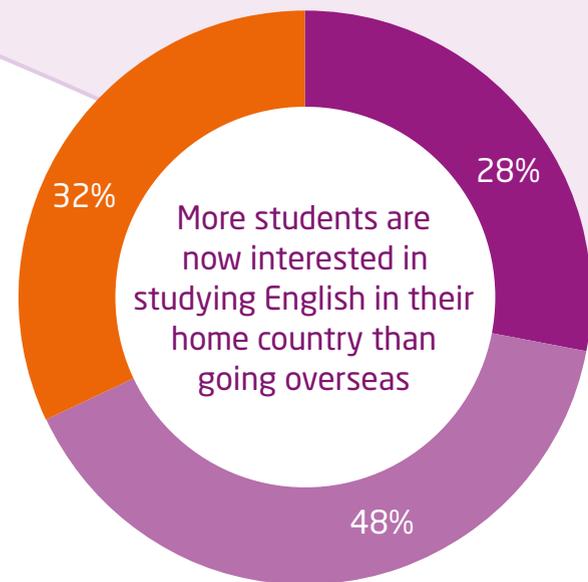
# Studying abroad for non-degree credentials

## Interest among students



# Changes in types of learning delivery

## English Language Provision





*For students coming to us, the pandemic is no longer a concern for those wishing to study abroad, as people are kind of used to it now. It also helps to see the UK offering our students such a promising study environment, even under pandemic conditions (as compared to the local situation here).*

**AGENT IN MALAYSIA**

# Study abroad behaviour

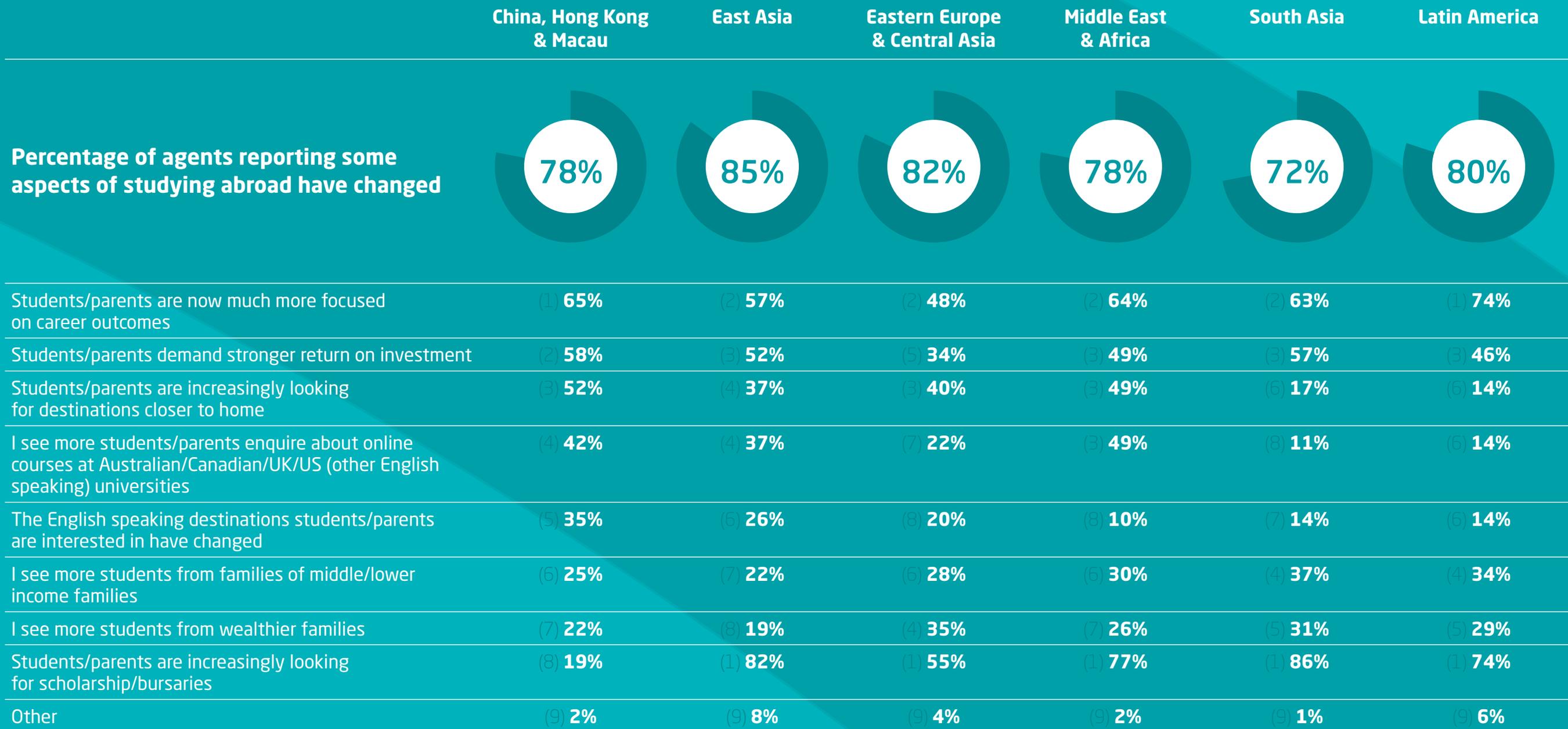
## What has changed?

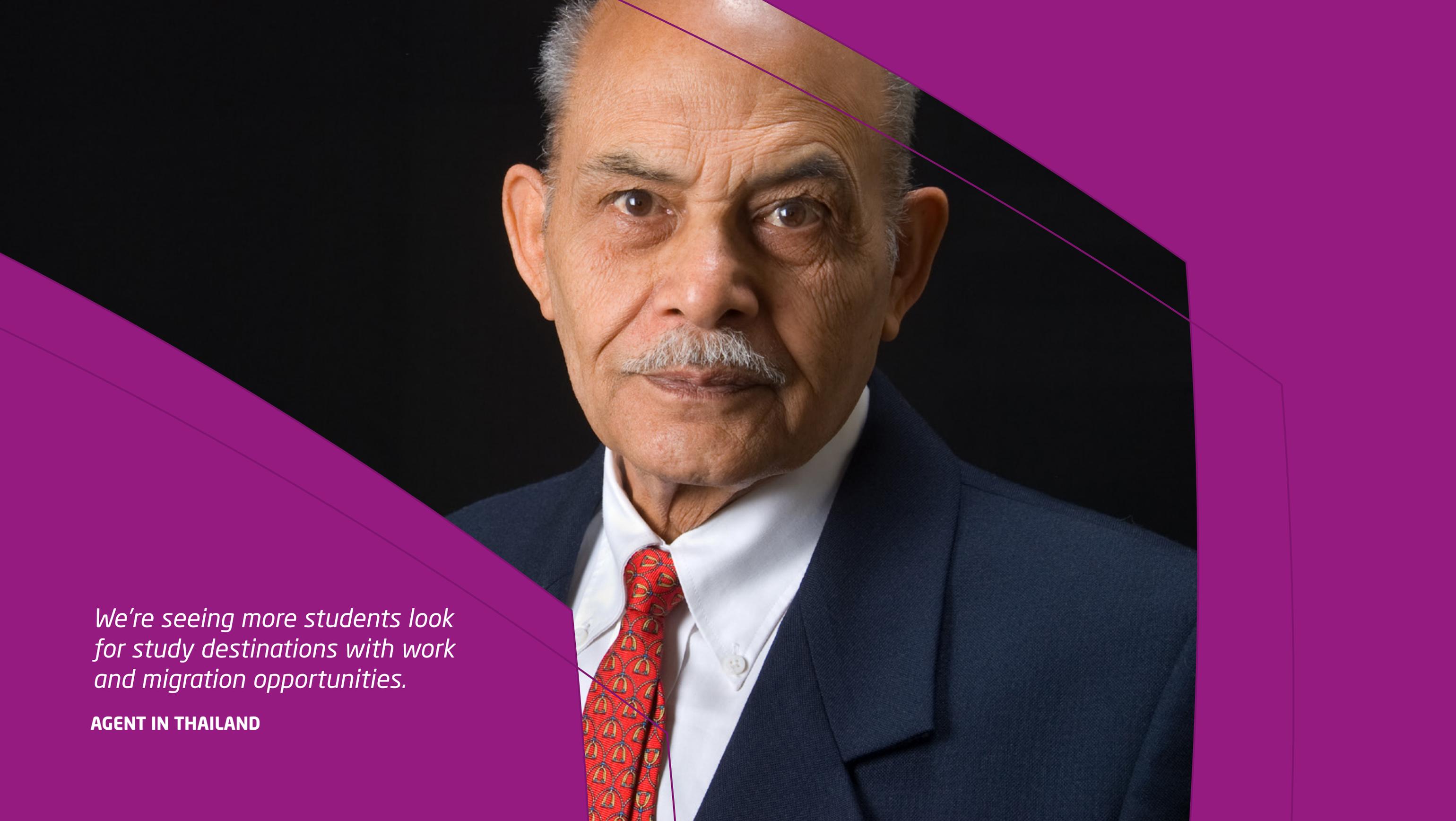
80%

of agents report that some aspects of studying abroad have changed as a result of the pandemic

Students/parents are increasingly looking for scholarship/bursaries	65%
Students/parents are now much more focused on career outcomes	61%
Students/parents demand stronger return on investment	49%
Students/parents are increasingly looking for destinations closer to home	38%
I see more students/parents enquire about online courses at Australian/Canadian/UK/US (other English speaking) universities	29%
I see more students from families of middle/lower income families	29%
I see more students from wealthier families	25%
The English speaking destinations students/parents are interested in have changed	24%
Other	4%

# Changes by region



A close-up portrait of an elderly man with a white mustache, wearing a dark blue suit jacket, a white dress shirt, and a red tie with a repeating pattern. He is looking directly at the camera with a serious expression. The background is black, and the image is framed by a purple geometric shape on the left and top right.

*We're seeing more students look for study destinations with work and migration opportunities.*

**AGENT IN THAILAND**

# Greatest impact

What will influence study abroad decisions over the next five years?



# Greatest impact by region

What will influence study abroad decisions over the next five years?

	China, Hong Kong & Macau	East Asia	Eastern Europe & Central Asia	Middle East & Africa	South Asia	Latin America
Immigration policies of destination countries	(5) <b>5%</b>	(2) <b>22%</b>	(1) <b>24%</b>	(1) <b>27%</b>	(1) <b>35%</b>	(2) <b>26%</b>
Job opportunities in destination countries	(4) <b>12%</b>	(1) <b>34%</b>	(3) <b>16%</b>	(1) <b>27%</b>	(2) <b>28%</b>	(1) <b>28%</b>
Quality of of higher education system in sending countries	(3) <b>20%</b>	(4) <b>12%</b>	(2) <b>18%</b>	(3) <b>22%</b>	(3) <b>13%</b>	(3) <b>16%</b>
Income level in sending countries	(7) <b>2%</b>	(5) <b>8%</b>	(4) <b>14%</b>	(5) <b>9%</b>	(6) <b>4%</b>	(5) <b>9%</b>
Future pandemics	(1) <b>31%</b>	(3) <b>14%</b>	(5) <b>12%</b>	(5) <b>9%</b>	(4) <b>9%</b>	(7) <b>2%</b>
Welcome to foreigners in destination countries	(5) <b>5%</b>	(6) <b>6%</b>	(6) <b>8%</b>	(7) <b>5%</b>	(5) <b>7%</b>	(4) <b>12%</b>
Geo-political relations	(2) <b>25%</b>	(7) <b>2%</b>	(6) <b>8%</b>	(8) <b>1%</b>	(7) <b>2%</b>	(7) <b>2%</b>
Future climate events	(9) <b>0%</b>	(9) <b>0%</b>	(9) <b>0%</b>	(9) <b>0%</b>	(9) <b>0%</b>	(9) <b>0%</b>
Other	(8) <b>1%</b>	(8) <b>1%</b>	(8) <b>1%</b>	(9) <b>0%</b>	(7) <b>2%</b>	(6) <b>5%</b>



*We're seeing more students look for study destinations with work and migration opportunities.*

**AGENT IN THAILAND**



Offices in 30+ countries



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

INTO University Partnerships  
One Gloucester Place  
Brighton  
BN1 4AA  
United Kingdom  
T: +44 1273 665200

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