INTO Agent Survey

Spring 2022

INTO

IMPORTANCE OF AGENT SURVEYS

Our agent partners play an absolutely vital role in INTO's success. In order to maintain optimal working relationships, it's crucial to listen to and take on feedback. Our agent surveys are just one means of collecting this feedback.

This annual agent survey focuses on:

- **Market perceptions**
  Understanding how agents from different parts of the world view the current opportunities and barriers to student placement in the top host destinations for international students.
- **Student decision-making**
  Understanding what drives student behaviors and monitoring changes in how they influence decisions over time.
- **Agent decision-making**
  As with student decision-making, but looking to the key items for our agent partners, and seeing how we can respond to them. This is anything from KPIs on our own service level provision, to our performance relative to competitors, perception of partner universities and quality of programs and student experience.

DEPLOYMENT AND DEMOGRAPHICS

The 2022 INTO Recruitment Partner Survey was distributed in Spring 2022 and received nearly 1500 responses, which came from over 80 countries globally.

China was the top responding country with just 399 responses, followed by India (106), Indonesia (102), United Kingdom (77) and Nigeria (69).

The strong response from our agent network is something we are hugely grateful to our partners for. Relationships with our recruitment partners are core to the success of our business, and we dedicate significant time and energy to supporting them and ensuring we listen and respond to their feedback.

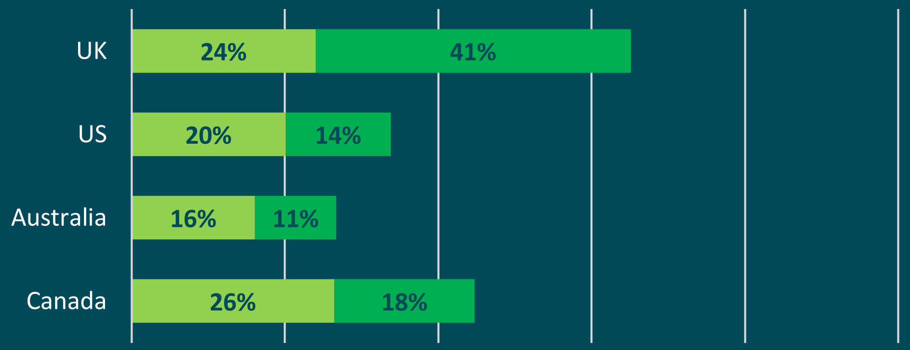
The 2022 spring survey was up to 40 questions long with the majority of respondents taking 12-16 minutes to complete the survey.

Greater Region	Responses	% of Total
China, HK & Macau	438	30%
East Asia	375	25%
ECA	174	12%
MEA	256	17%
South Asia	142	10%
The Americas	88	6%
Grand Total	**1473**	**100%**

IMPROVED RECRUITMENT OUTLOOK FOR 2022-23, WITH UK BEST PLACED TO GROW VOLUMES

Expect to send more students to […] in coming year

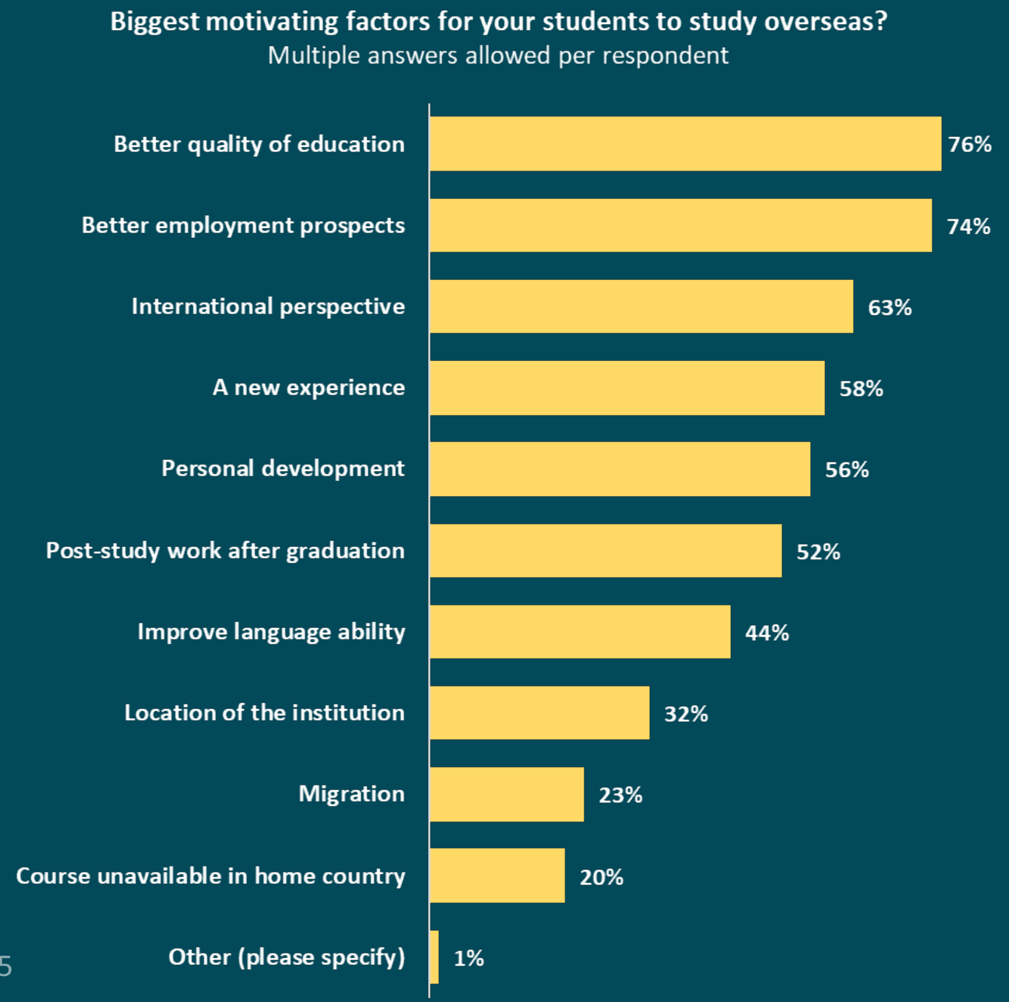
Results from prior survey in Spring 2021



- Majority of agents are expecting improved student placement compared to 2021-22 this coming year. The improved sentiment year on year is significant for all destinations.
- UK leads comfortably in terms of those expecting more students than in 2021-22, with 82% of agents expecting more UK students this year.
- The proportion of respondents confident of recruiting “significantly more” students to the UK (51%) was nearly double that for other leading destinations.
- The UK’s strong position is considered linked to its consistently relaxed policy on travel and quarantine throughout the pandemic. This competitive advantage will have been reduced in recent months, though lingering concerns for destinations with stricter policies appear to have persist.
- For **Chinese agents** once again the UK is best positioned, with Australia clearly in 2nd place, ahead of the US with Canada having the weakest expected demand from China. Chinese agent sentiment is noticeably weaker than usual for all destinations except the UK.
- **Indian agents** are very confident of growth for the UK and the US, confidence for Canada is high too albeit behind UK & US. Australia is in 4th place though still has 70% of agents expecting to send slightly or significantly more to Australia this year.

Source: INTO Agent Survey, Spring 2022

QUALITY OF EDUCATION AND EMPLOYMENT PROSPECTS REMAIN KEY DRIVERS

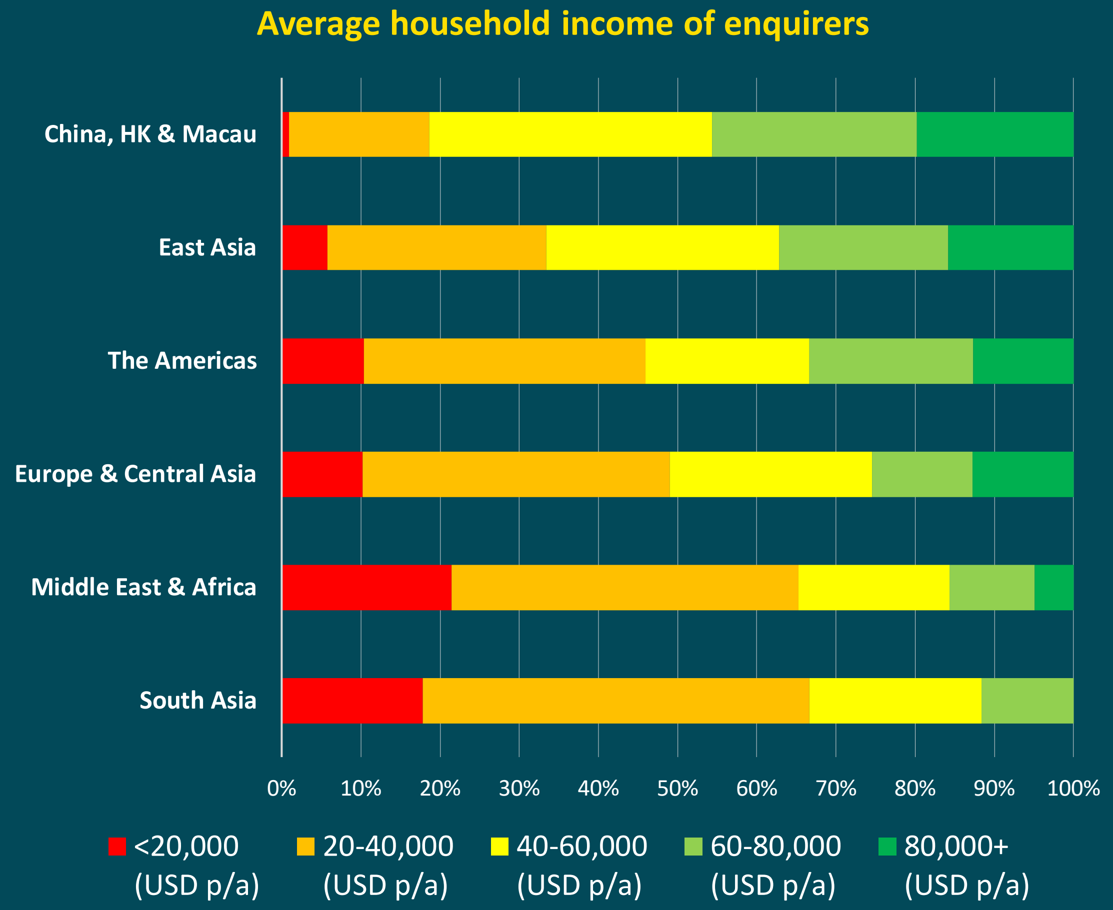


- Top student motivations for studying abroad remain **(1) Access to better quality education** and **(2) better employment prospects**, followed by several key personal experiential reasons such as international perspective, new experience and personal development

- Results were consistent with previous years in almost all categories.

- One notable change is the drop to 52% (from 58% in 2021) of post-study work after graduation. Much of this is driven by a significant drop in Chinese agents citing this (from 43% in 2021 to 31% in 2022). This reflects a long-term decline in Chinese students staying abroad post-study. Covid may have exacerbated this change in sentiment and it's possible that some domestic concerns with China's zero-Covid policy combined with a weakening of economic growth in China could potentially lead to a reversal in this trend in the near future.

AFFORDABILITY: A MORE SIGNIFICANT CHALLENGE OUTSIDE OF CHINA AND EAST ASIA

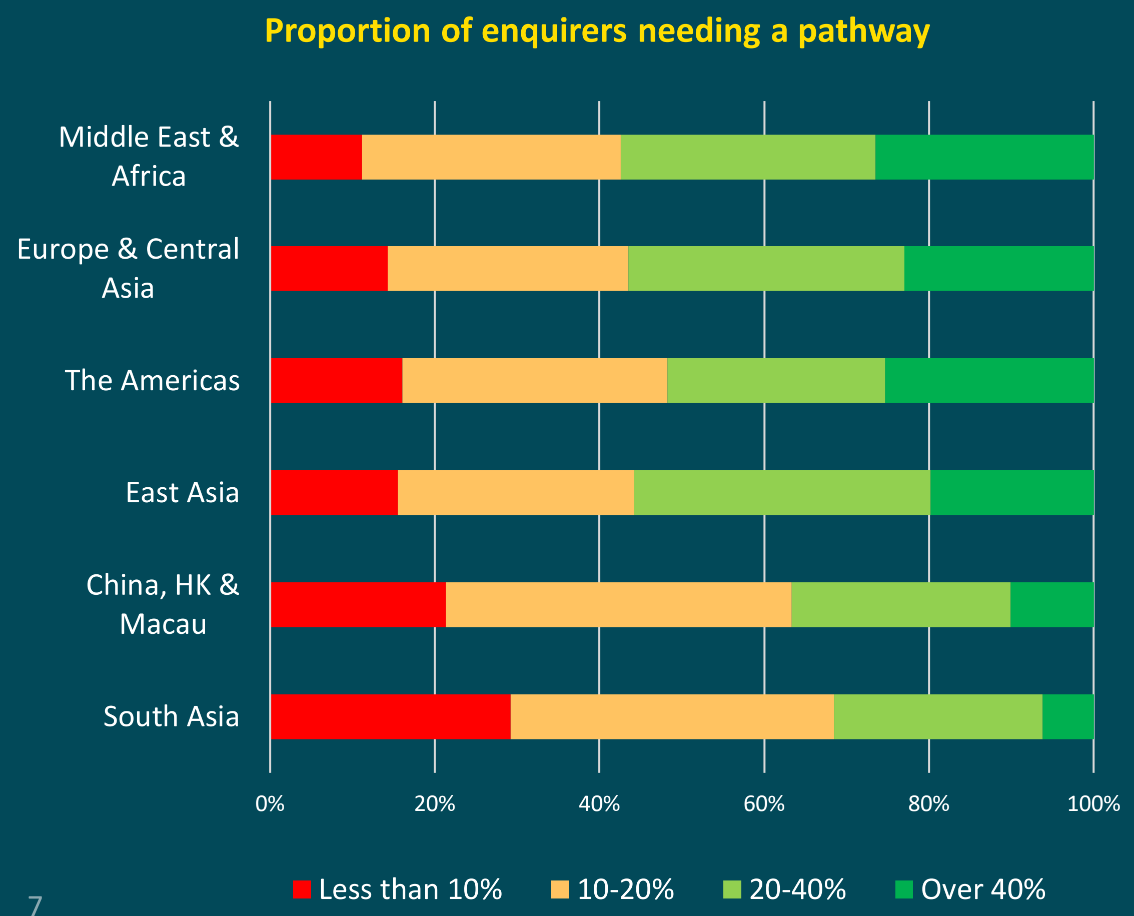


In terms of estimated annual household income, the median range for student enquiries globally was in the USD 40-60k range with some expected market differences.

Most South Asia and Middle East & Africa agents indicated their average enquirers had an annual household income of less than USD 40k.

With recent strong student number growth coming from South Asia and Africa, institutions with a strong value proposition are best placed for taking advantage of the big opportunities for volume growth.

CHINA AND SOUTH ASIA ARE KEY MARKETS FOR PATHWAY VOLUMES, BUT AGENTS FELT PROPORTION OF STUDENTS NEEDING ONE LOWER THAN IN OTHER REGIONS



Looking specifically at pathway opportunity, the perceived level of need is fairly even across the Middle East & Africa, Europe & Central Asia, the Americas and East Asia, all of which have a high proportion of students who are likely to require a pathway.

By contrast the proportion from China, Hong Kong & Macau needing a pathway was considered to be proportionately lower, whilst South Asia is notably lower again.

However, despite this, the extremely high volumes of students coming from China and India ensure that China, Hong Kong & Macau as well as South Asia remain very important markets for pathway student recruitment.

RESPONSIVENESS IDENTIFIED BY 4 IN 5 AS KEY SERVICE PRIORITY

- Agents are consistent on their priorities with similar responses to prior years.
- Application and general enquiry response times are vital if they are to keep their customers happy and well serviced.
- Availability of scholarships is one where huge variation exists between Chinese agents (where only 18% consider it very important) and agents across the Rest of the World (their 4th highest at 61%)
- Choice of degree programs is an item that has appreciably increased in significance year on year.

MORE THAN 4 IN 5 AGENTS CITED RESPONSIVENESS TO INQUIRIES AS A KEY SERVICE PRIORITY FROM PARTNER INSTITUTIONS

84% of Agent said partner responsiveness was “very important”

Satisfaction with INTO's Regional Offices

Local support from in-market staff, typically in the same time zone and usually in local language is key to effective support and ongoing training of INTO's agent network.

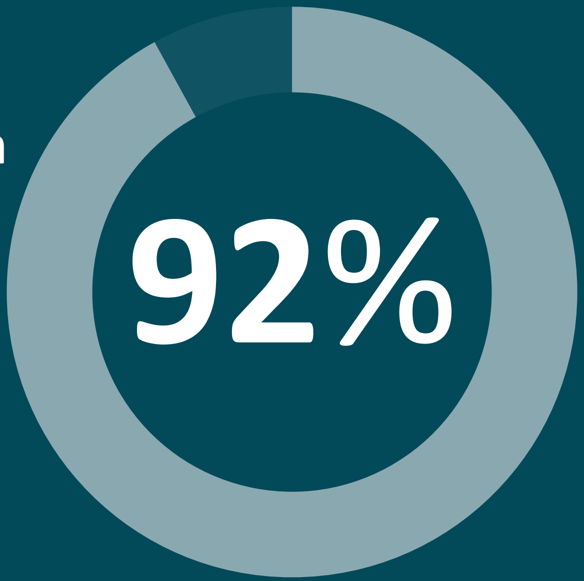
93% of respondents were satisfied with the support they have received from INTO's regional offices in the past 12 months.

Source: INTO Agent Survey, April 2022

Satisfaction with INTO support

Overall satisfaction with INTO support is a key performance indicator for INTO.

92% of respondents were satisfied with the overall support they have received from INTO in the past 12 months.



Source: INTO Agent Survey, April 2022

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