Introduction

- Initially launched in 2020, ICEF Agent Voice is a bi-annual survey voicing the opinions of student recruitment agents across the globe

- The current study ran from the beginning of 2022 until now
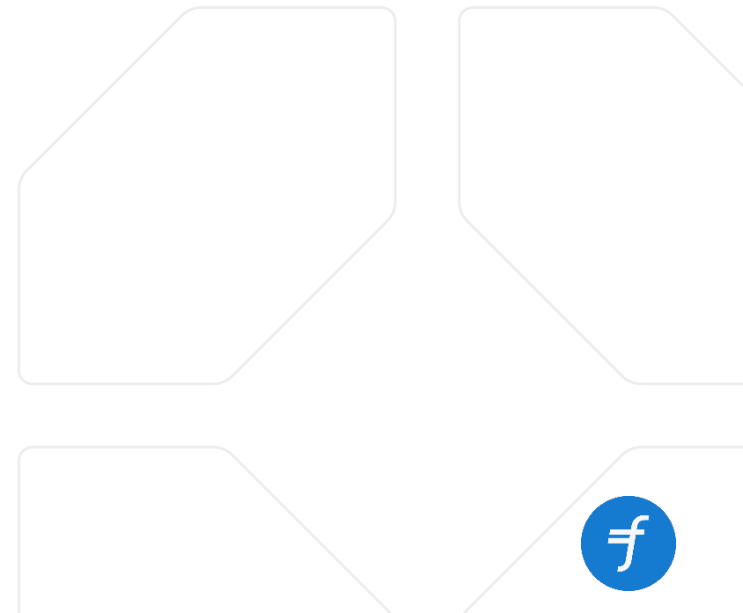
- Five distinct sections

Five sections

1 **Review & Forecast: 2020–2022**

2 **Recruiting for Online Programmes**

3 **Recruitment, Commission & Payments**

4 **Digital Marketing**

5 **Study Destinations & Visa Approval Rates**

Agent Profile

ICEF Agent Voice 2022

669
AGENTS

62
COUNTRIES

ACROSS 9 REGIONS

AUSTALASIA
6%

SOUTH AND CENTRAL AMERICA
10%   10

MIDDLE EAST
3%   3

AFRICA
10%   10

EUROPE (NON-EU)
6%   6

ASIA
45%   45

UNITED KINGDOM
3%   3

EUROPE (EU)
8%   8

NORTH AMERICA
9%   9
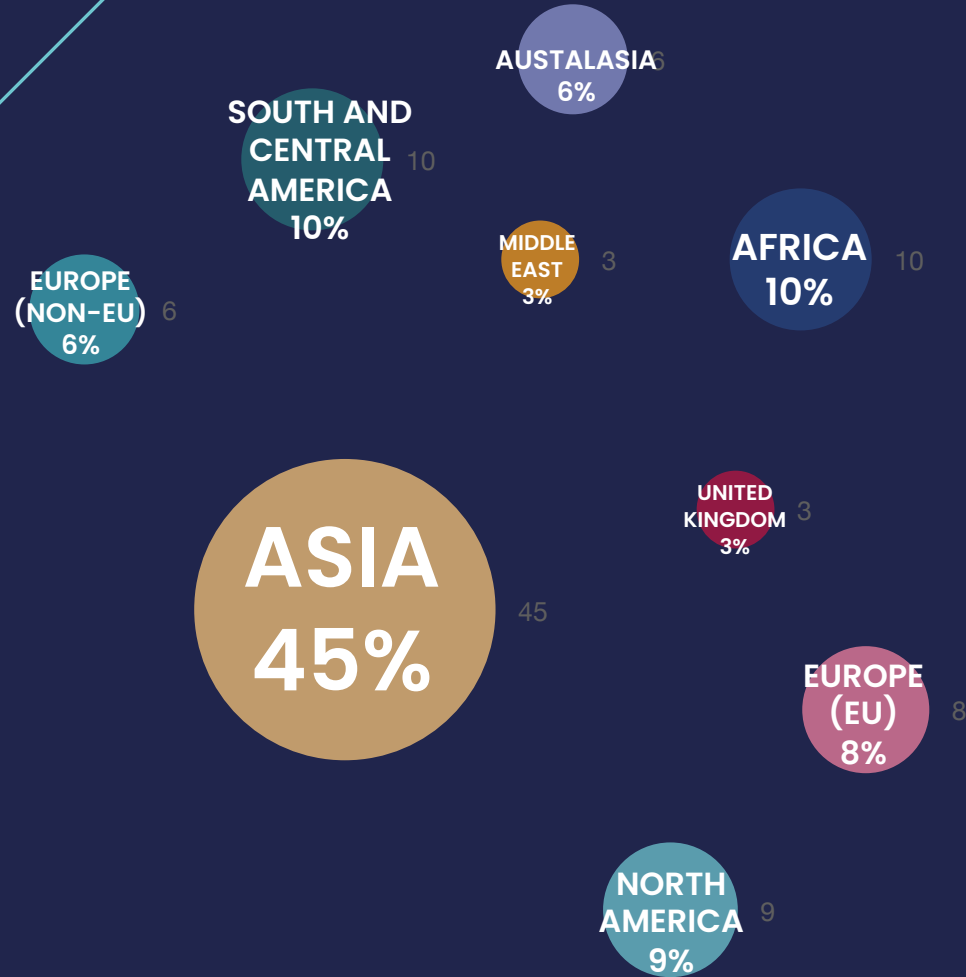
Broken down to each country

- BRAZIL 3%
- UKRAINE 2%
- INDIA 18%
- GERMANY 2%
- UNITED KINGDOM 3%
- MEXICO 2%
- GHANA 2%
- NIGERIA 3%
- OTHERS (<1%) 31%
- MONGOLIA 2%
- ITALY 2%
- NEPAL 6%
- TURKEY 2%
- PAKISTAN 4%
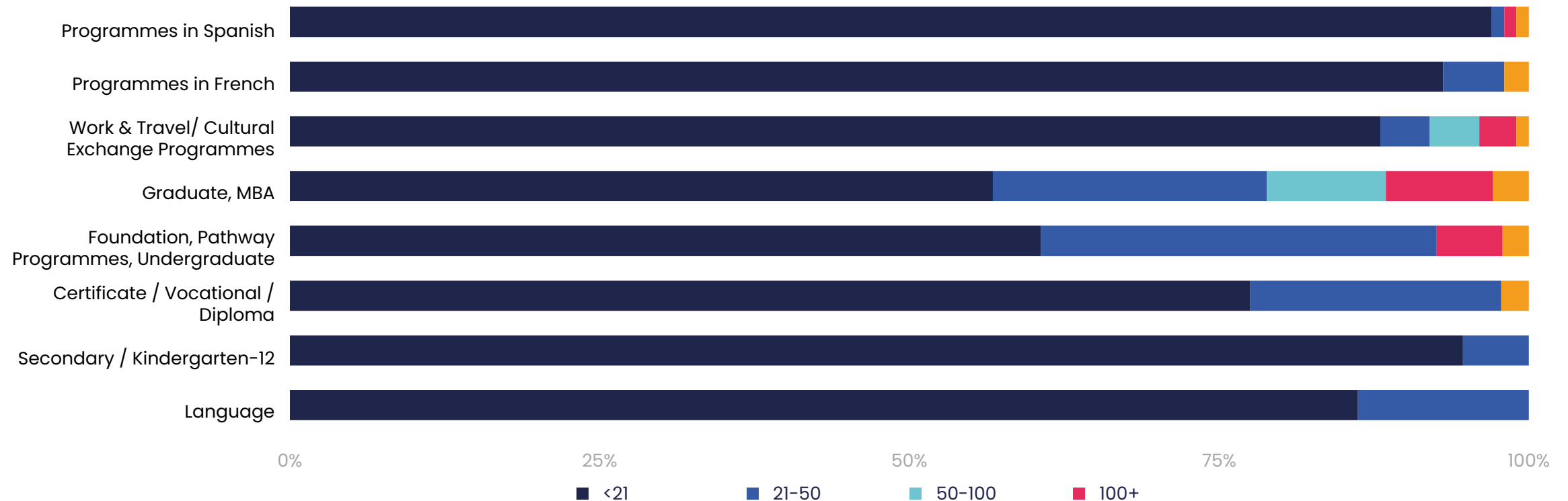- NEW ZEALAND 2%
- AUSTRALIA 4%
- VIETNAM 4%
- CANADA 8%
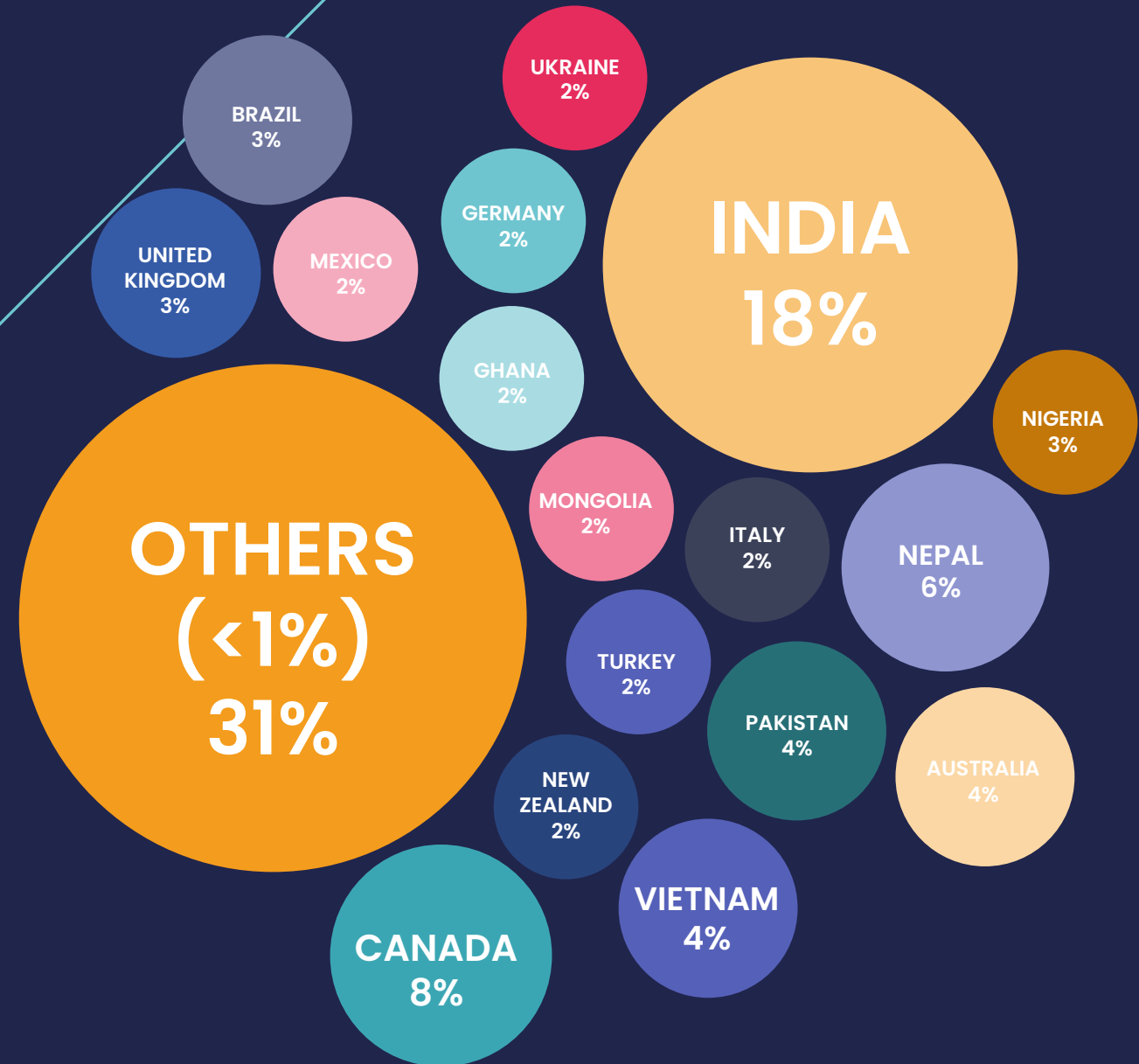
1. Review & Forecast 2020 – 2022

Programme Recruitment

How many students have you recruited in the last 12 months for the programmes below?

Legend: ■ <21 ■ 21-50 ■ 50-100 ■ 100+

Categories (top to bottom):
- Programmes in Spanish
- Programmes in French
- Work & Travel/ Cultural Exchange Programmes
- Graduate, MBA
- Foundation, Pathway Programmes, Undergraduate
- Certificate / Vocational / Diploma
- Secondary / Kindergarten-12
- Language

Axis: 0% — 25% — 50% — 75% — 100%

Enrolment Expectation

What are your expectations for student enrolment figures for 2022?

Legend: ■ Less than 2021 ■ The same as 2021 ■ More than 2021

Categories (top to bottom): Language; Graduate, MBA; Foundation, Pathway Programmes, Undergraduate; Certificate / Vocational / Diploma; Secondary / Kindergarten-12

X-axis: 0%, 25%, 50%, 75%, 100%
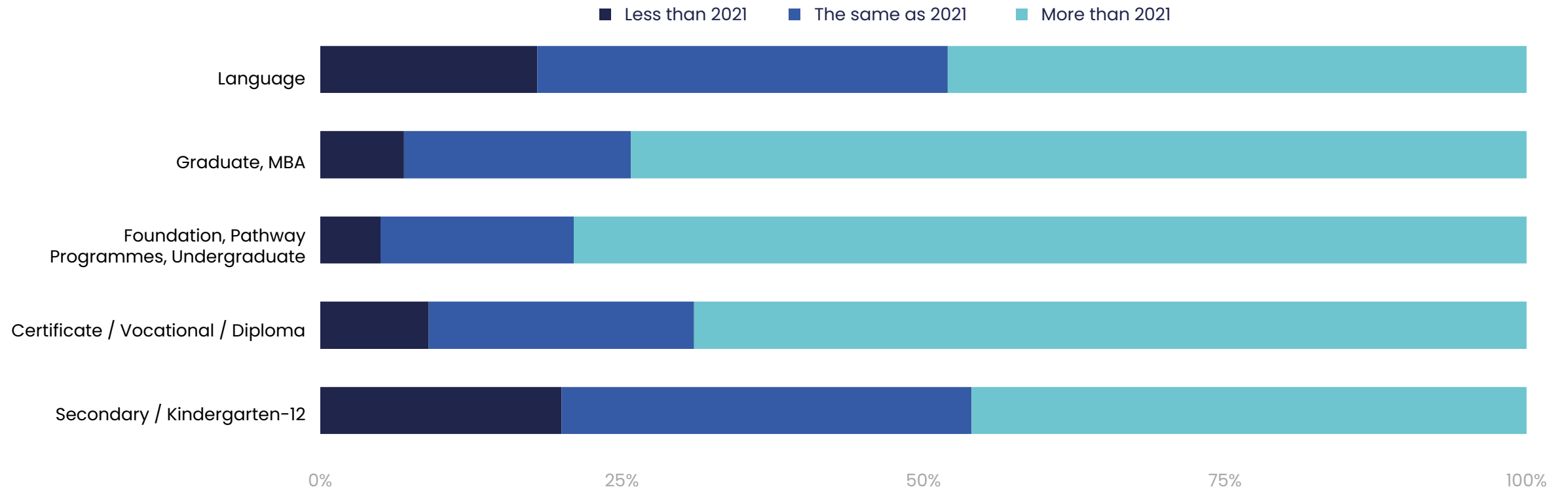
Educator Partner Communication

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

- Increased communication: 50%
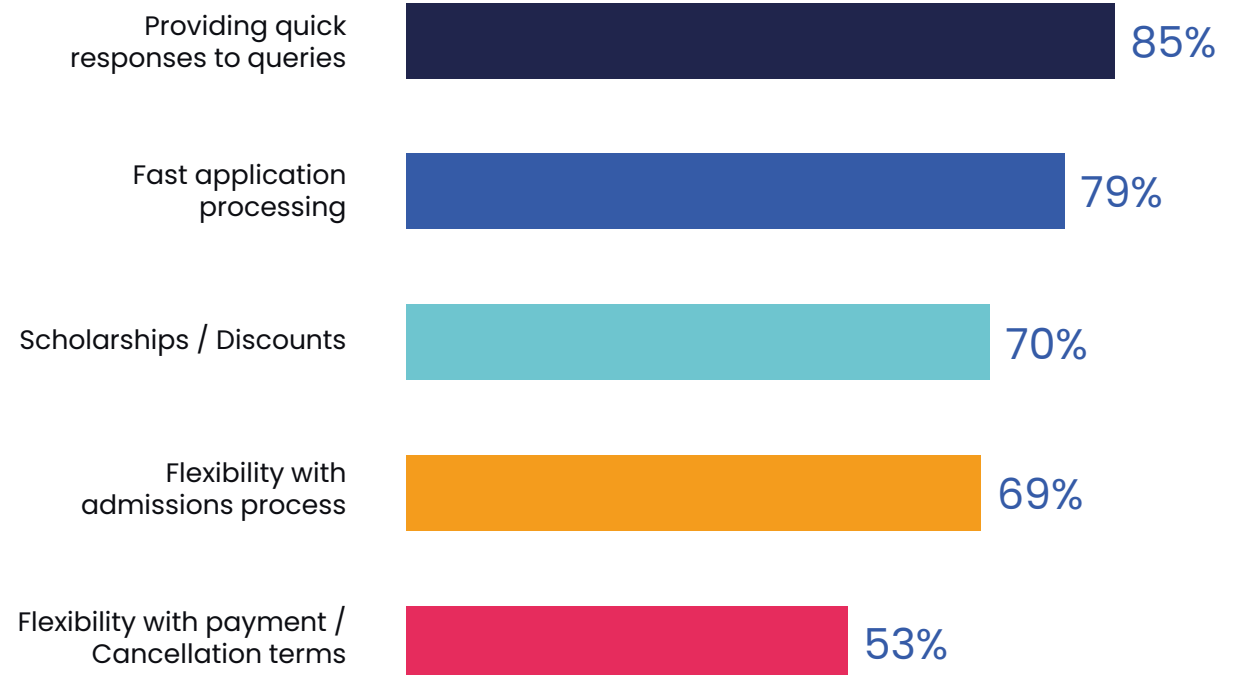- Same as last year: 21%
- Decreased communication: 29%
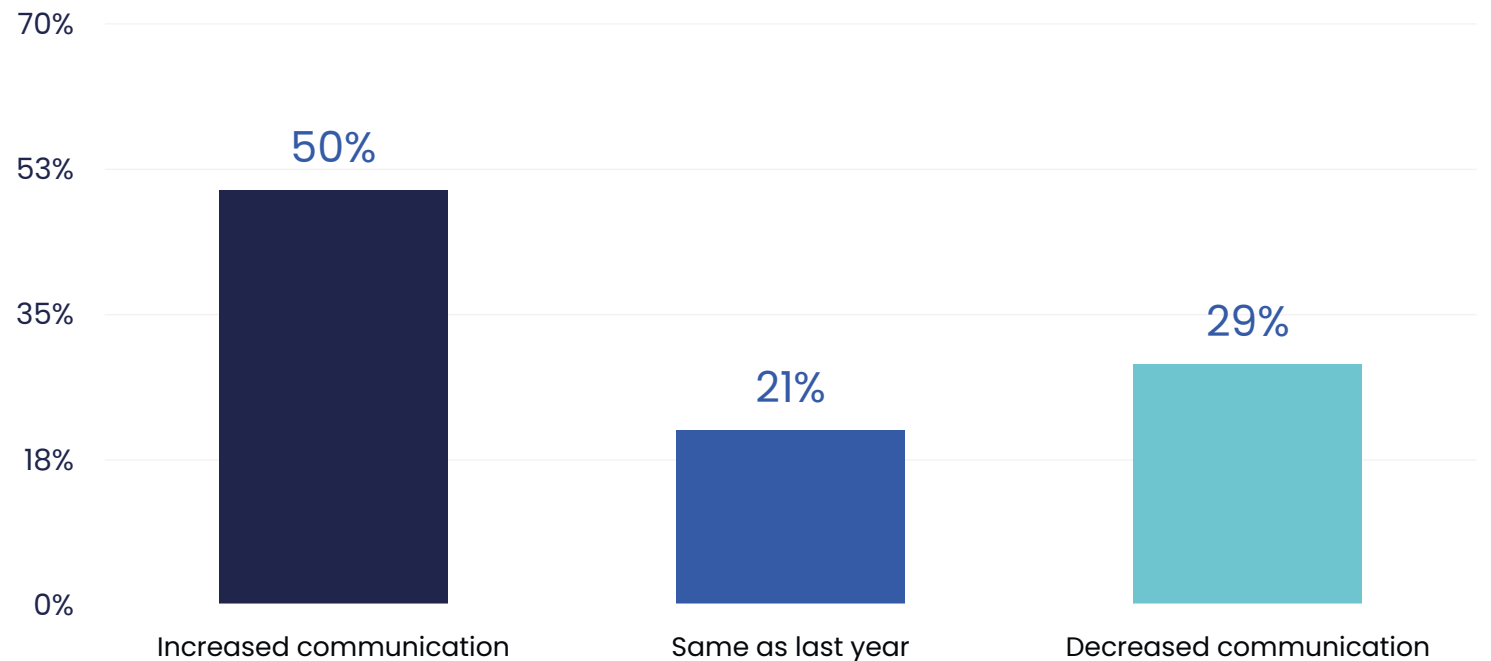
88% of agents have established new partnerships in the past 2 years

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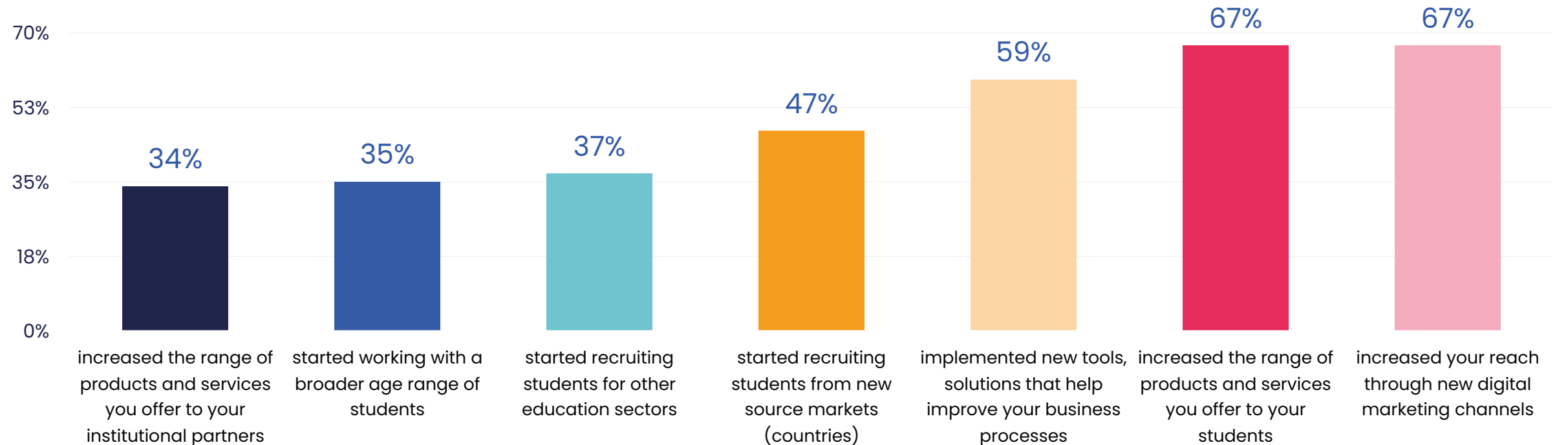
From the options below, what areas do you most value the support of your partner schools when it comes to successfully enrolling students?

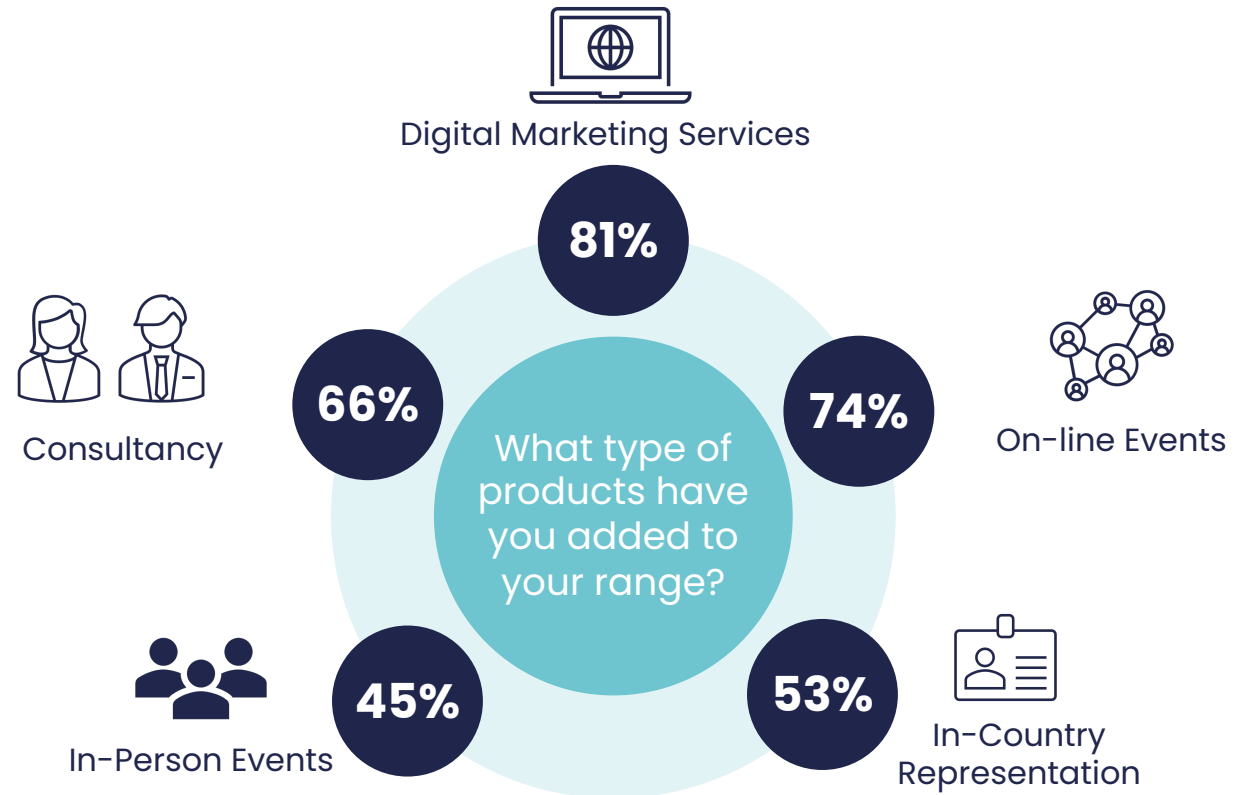|	
Providing quick responses to queries	85%
Fast application processing	79%
Scholarships / Discounts	70%
Flexibility with admissions process	69%
Flexibility with payment / Cancellation terms	53%

Growth Efforts

In the last 2 years, have you:

34%	35%	37%	47%	59%	67%	67%
increased the range of products and services you offer to your institutional partners	started working with a broader age range of students	started recruiting students for other education sectors	started recruiting students from new source markets (countries)	implemented new tools, solutions that help improve your business processes	increased the range of products and services you offer to your students	increased your reach through new digital marketing channels

Products and services offered to partners

What type of products have you added to your range?

Digital Marketing Services
81%

Consultancy
66%

On-line Events
74%

What type of products have you added to your range?

In-Person Events
45%

In-Country Representation
53%

Products and services offered to **students**

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

Financial Products	44%
Travel	57%
Insurance	57%
Accommodation	60%
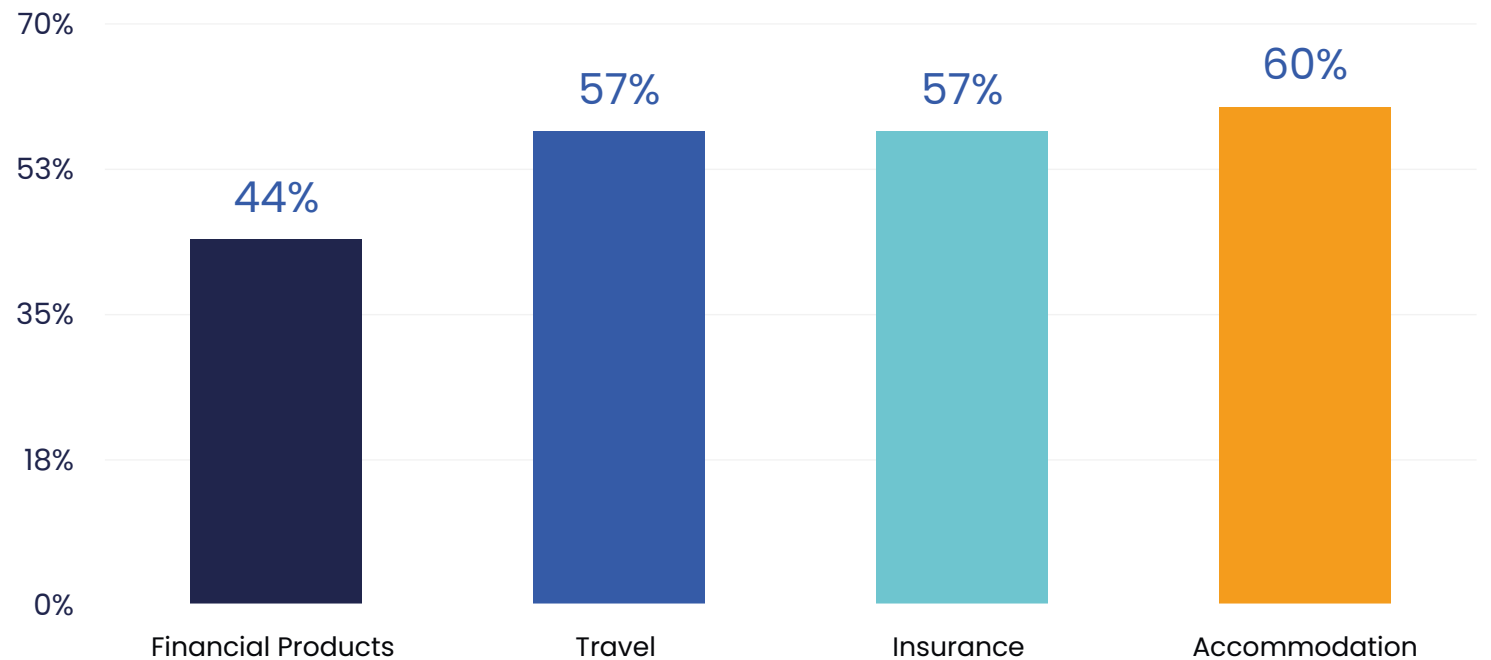
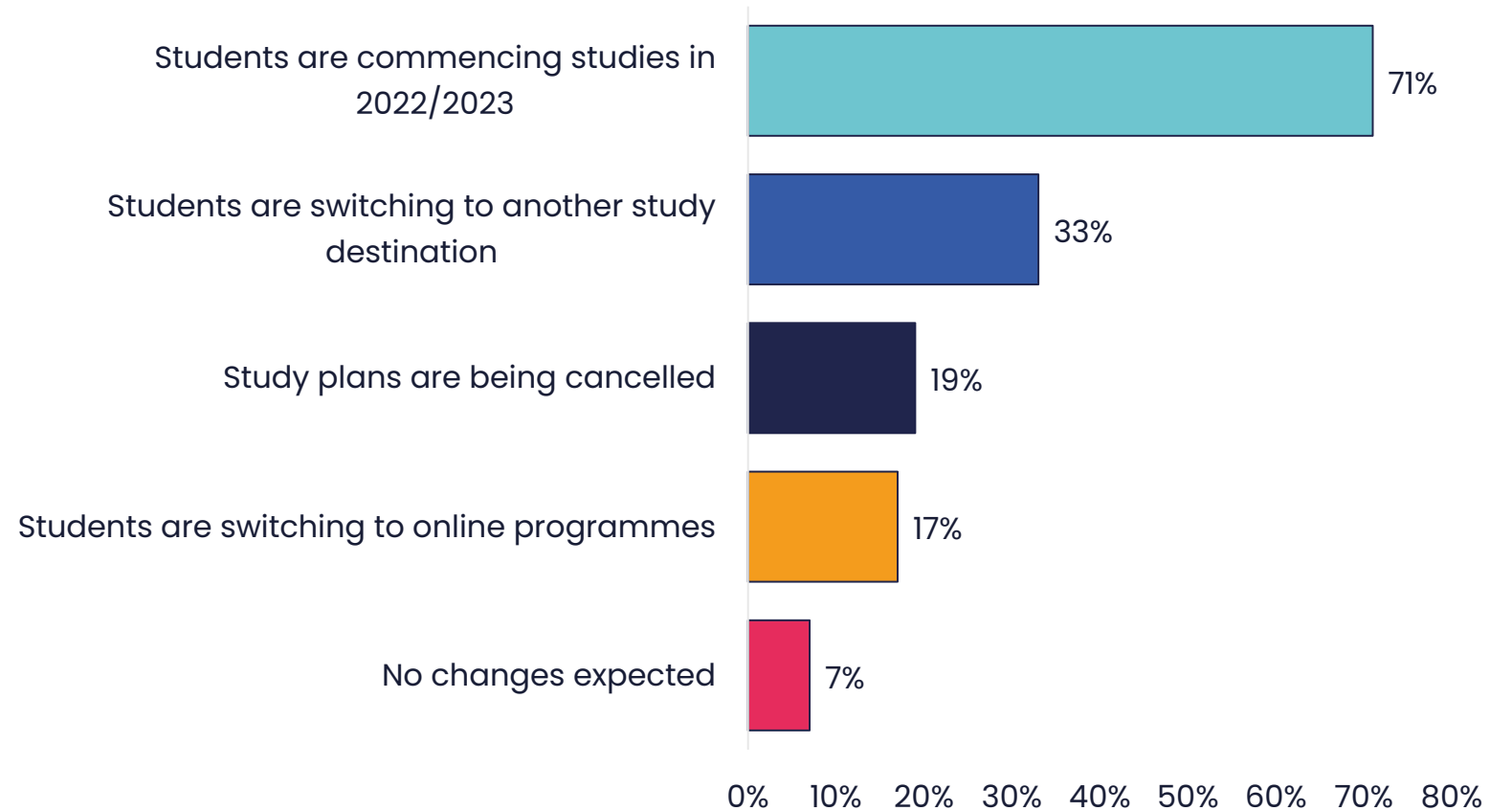# Forecasting:

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

What is your outlook for 2022?

Category	Value
Students are commencing studies in 2022/2023	71%
Students are switching to another study destination	33%
Study plans are being cancelled	19%
Students are switching to online programmes	17%
No changes expected	7%

Student interest – studying abroad

What is the current level of interest from students for study abroad?

Category	Percentage
Interest is lower than 2021	7%
Interest is the same as 2021	21%
Interest is higher than 2021	73%
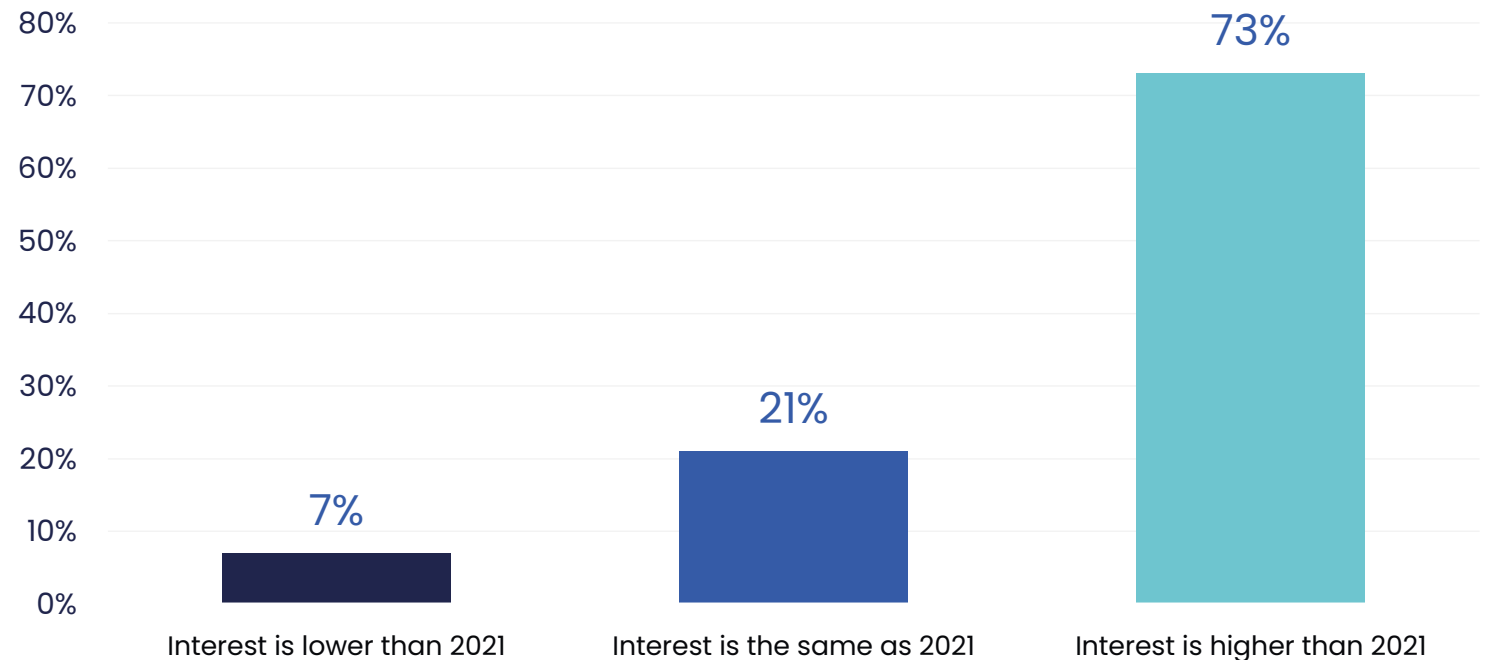
Important factors for studying abroad

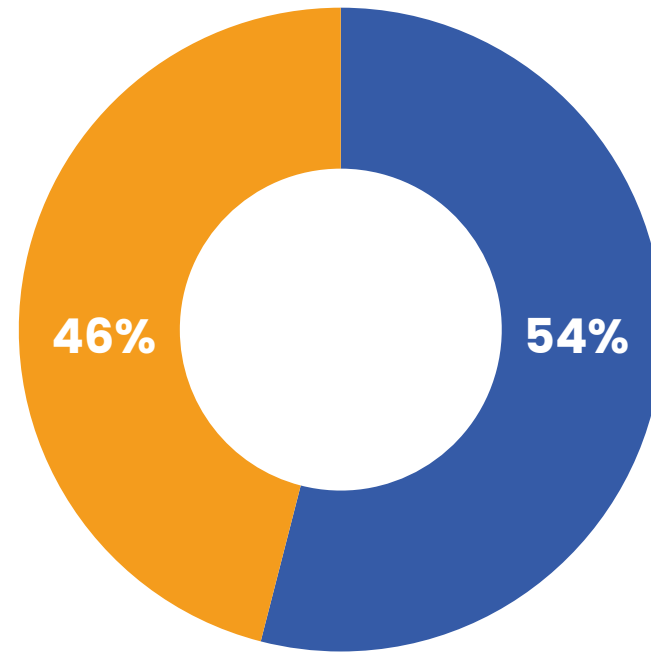When planning their study abroad, which are your students' most important decision-making factors?

Factor	Percentage
Travel restrictions / Flight availability	46%
Work/Immigration opportunities in the destination country	66%
Cost of study and living	75%
Availability of Visa processing	61%
Personal safety / Health environment	33%
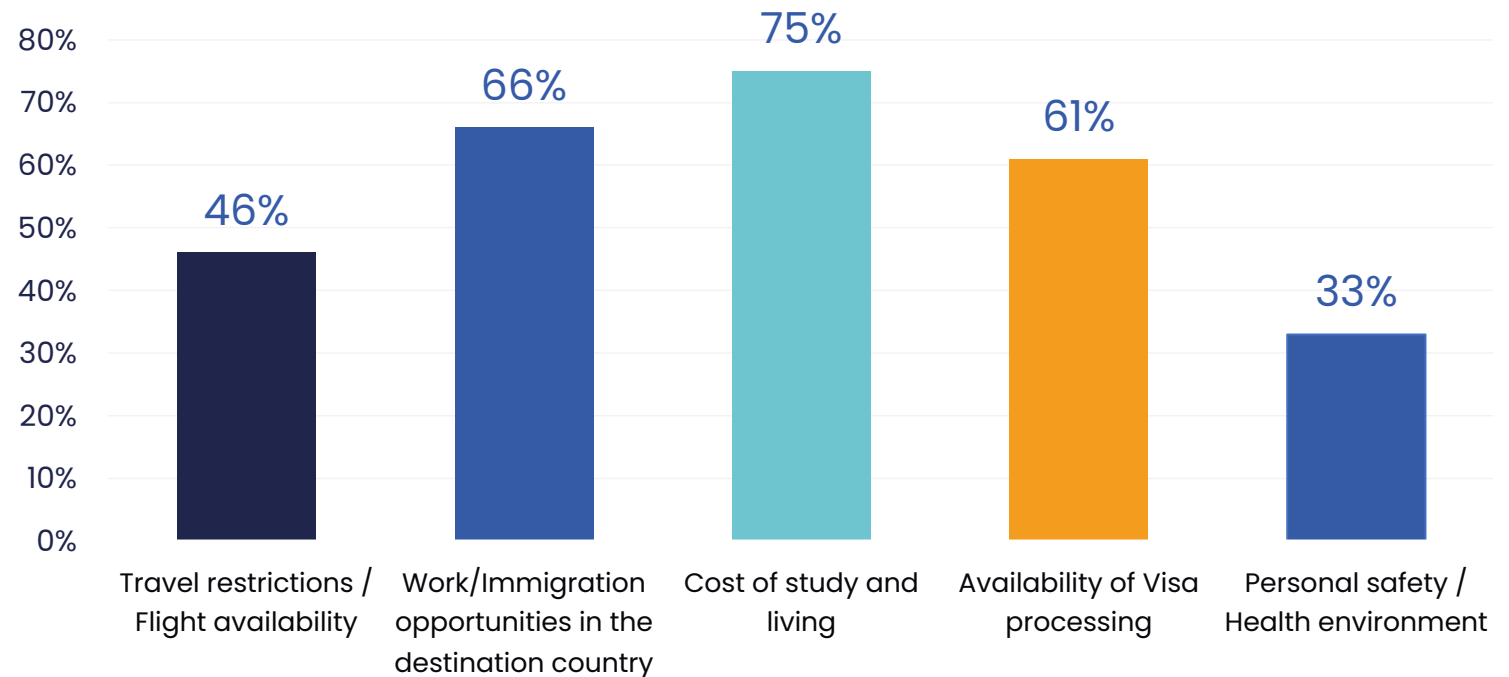
2. Recruiting for Online Programmes

Online programmes

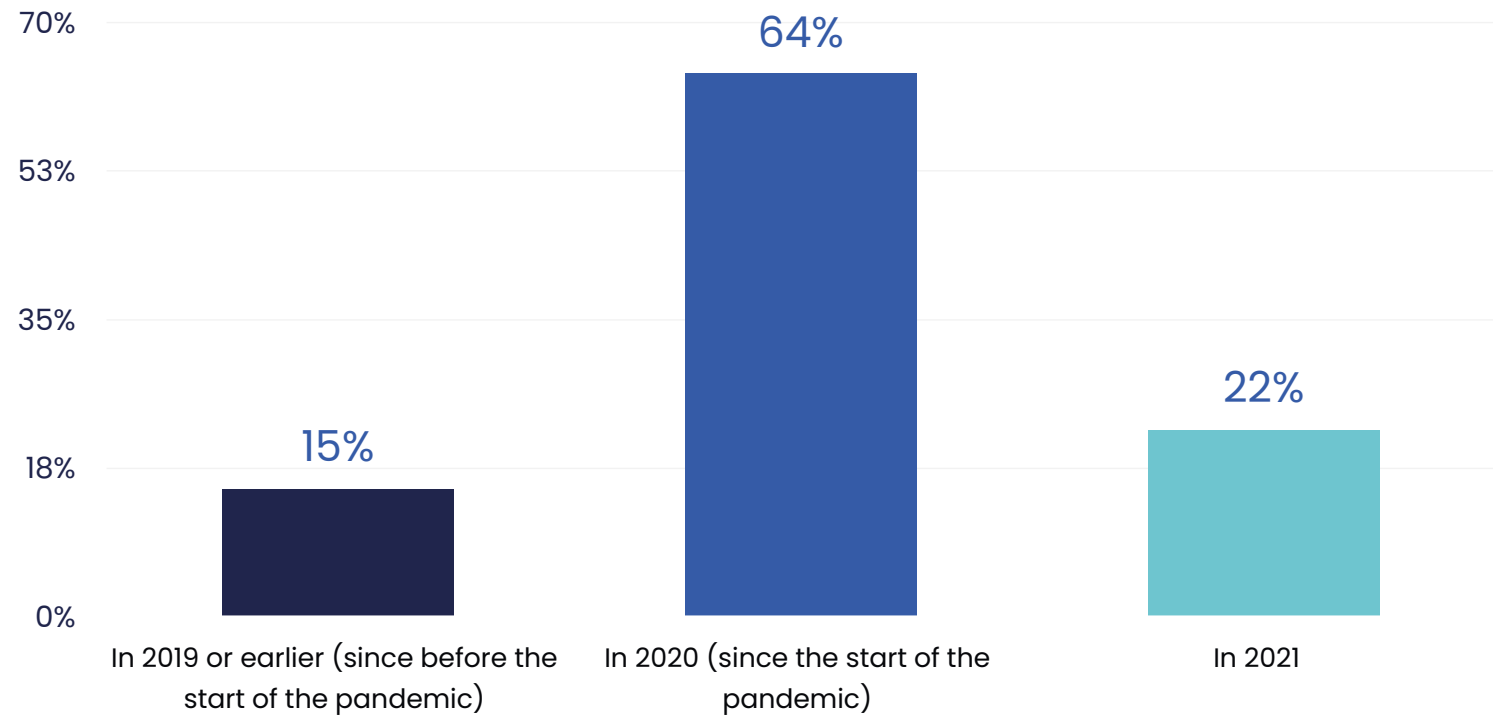Are you currently selling or promoting online education / online programmes?

46% **54%**

■ Yes ■ No
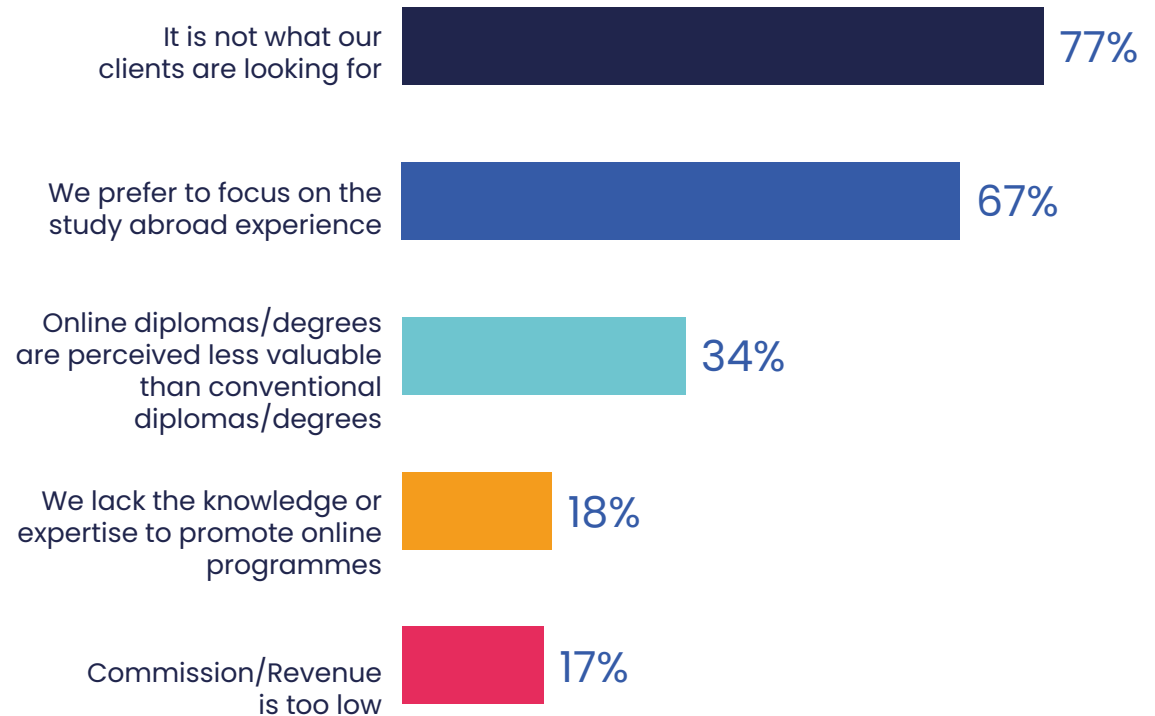
Online programmes

When did you start selling and promoting online programmes?

- In 2019 or earlier (since before the start of the pandemic): 15%
- In 2020 (since the start of the pandemic): 64%
- In 2021: 22%

46% not currently promoting online programmes:

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

Category	Percentage
It is not what our clients are looking for	77%
We prefer to focus on the study abroad experience	67%
Online diplomas/degrees are perceived less valuable than conventional diplomas/degrees	34%
We lack the knowledge or expertise to promote online programmes	18%
Commission/Revenue is too low	17%

46% not currently promoting online programmes:

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

25%

47%

28%
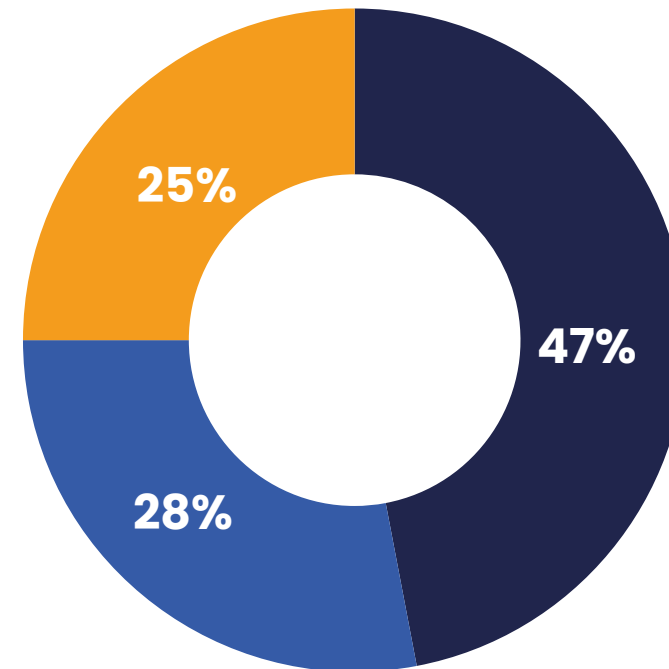
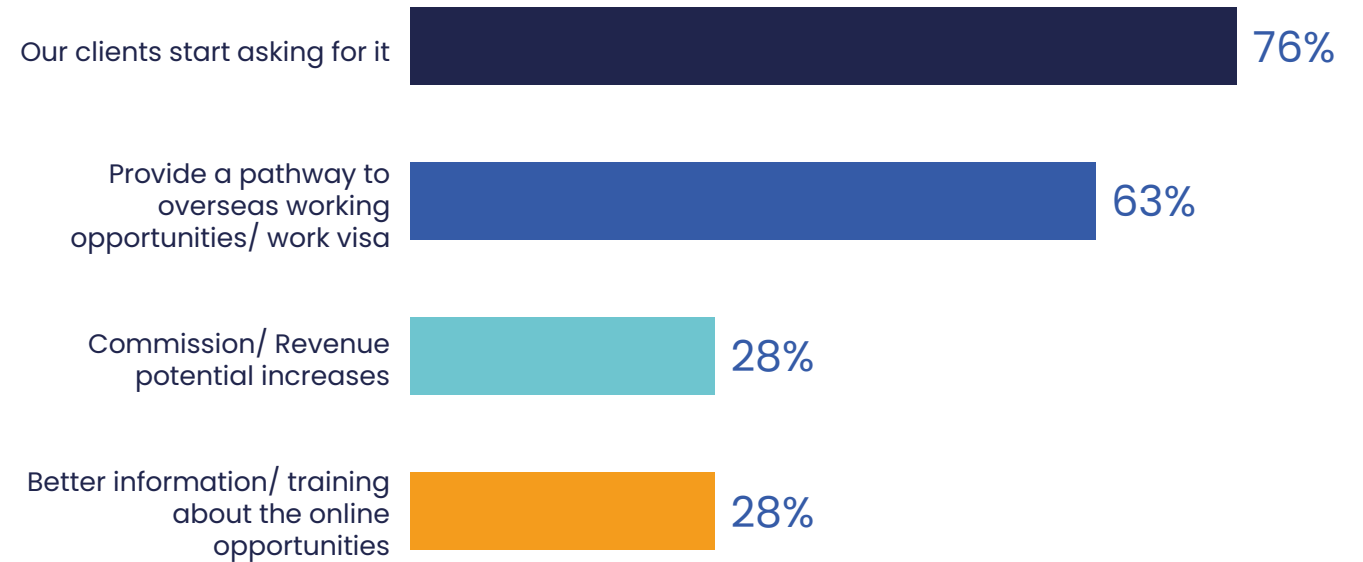■ Maybe, if...   ■ Yes, abbsolutely   ■ No

Considering promotion of online programmes:

Maybe if…

Category	Percentage
Our clients start asking for it	76%
Provide a pathway to overseas working opportunities/ work visa	63%
Commission/ Revenue potential increases	28%
Better information/ training about the online opportunities	28%

54% promoting online programmes:

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

Language learning	64%
Hybrid / blended programmes	40%
Pathway programmes	37%
Entirely online Higher Education programmes	32%
Digital credentials (short courses) / Online bootcamps	17%
Entirely online K-12/Secondary programmes	12%
Virtual internships	7%
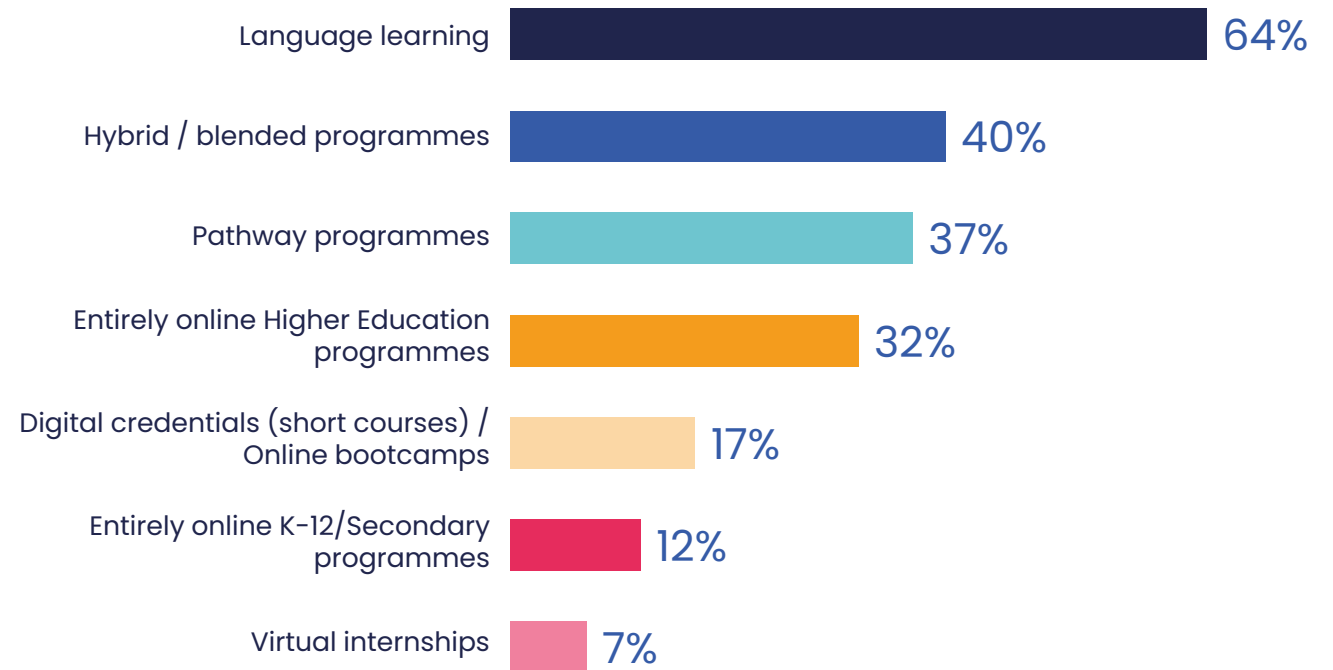
54% promoting online programmes:

Why do you offer and promote online programmes?

They allow me to sell education solutions also when borders are closed	66%
They open up opportunities for students with lower budgets	54%
They allow me to reach new types of customers/students	49%
There is an increasing demand for online learning	47%
They provide our agency/organization with an additional revenue stream	41%
They allow me to keep offering study opportunities to my clients, even after graduation ('lifelong learning')	36%
Other	1%

Agents' interest in meeting online providers:

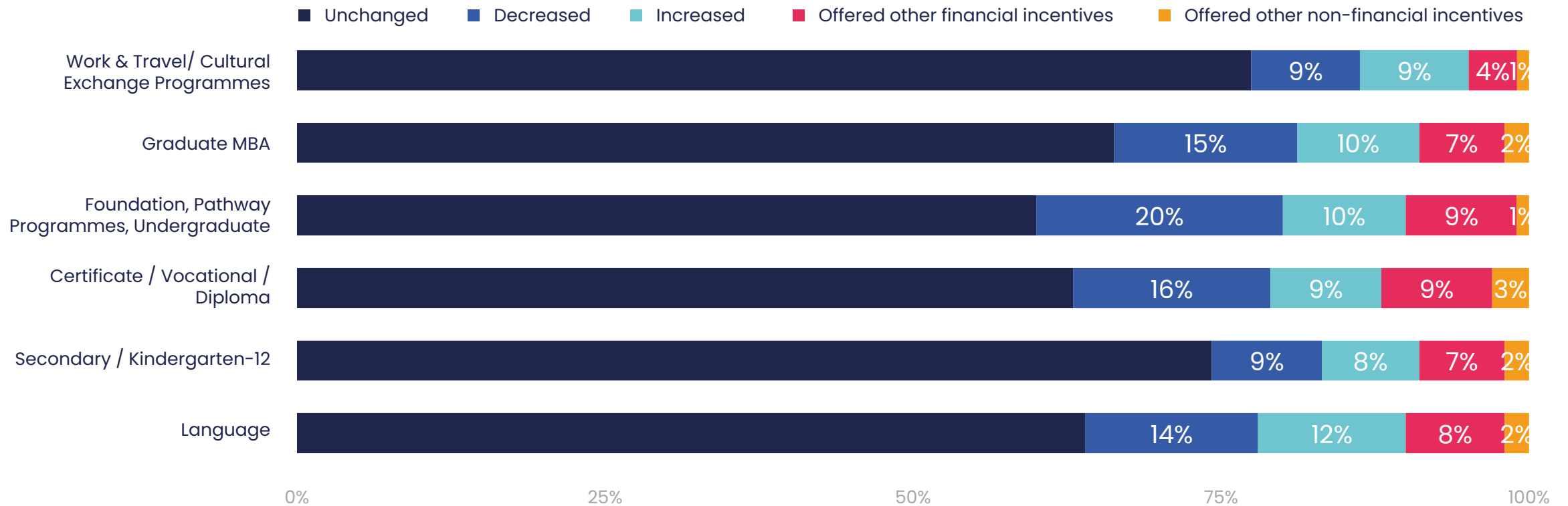Would you be interested to meet dedicated online (only) learning providers at ICEF events?

Response	Percentage
No	9%
Not really	21%
Maybe	30%
Yes, absolutely	40%
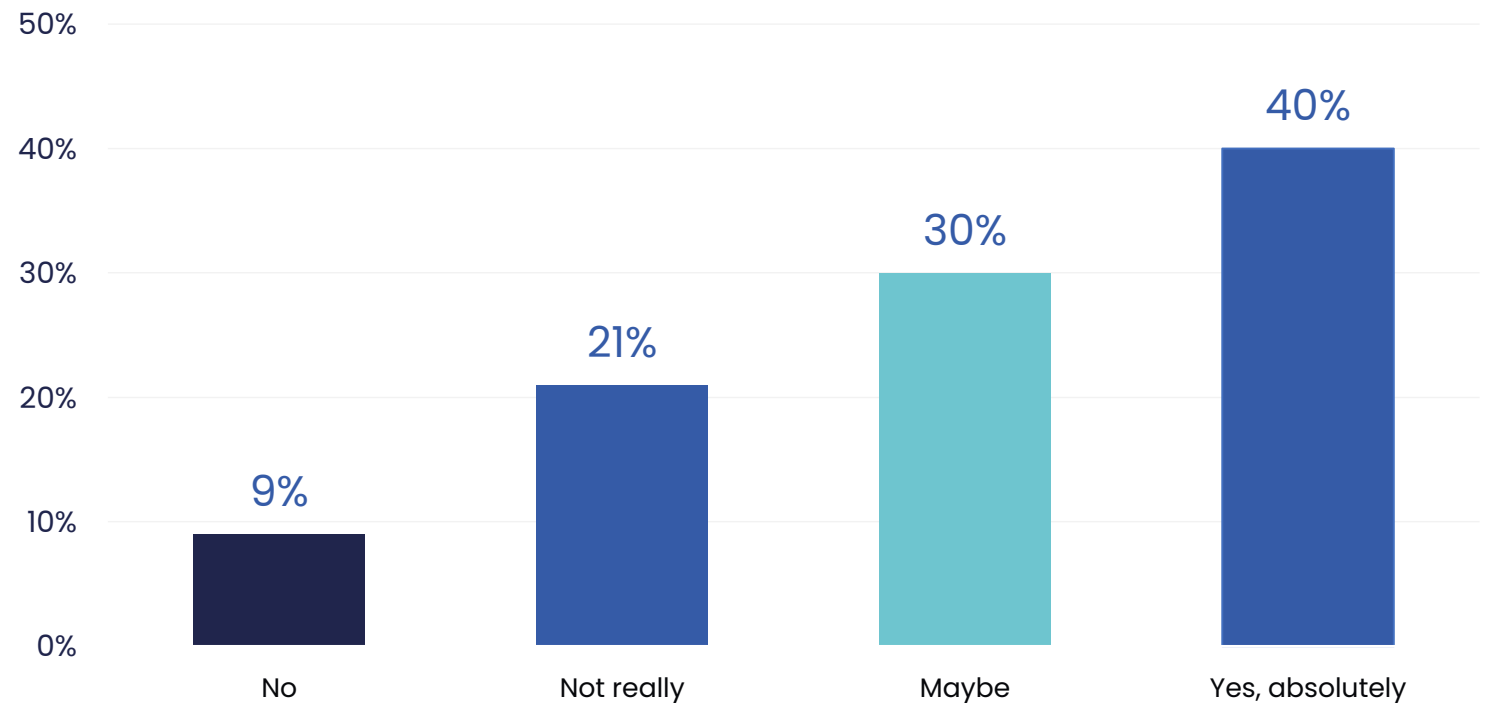
3. Recruitment, Commission & Payments

Remuneration changes

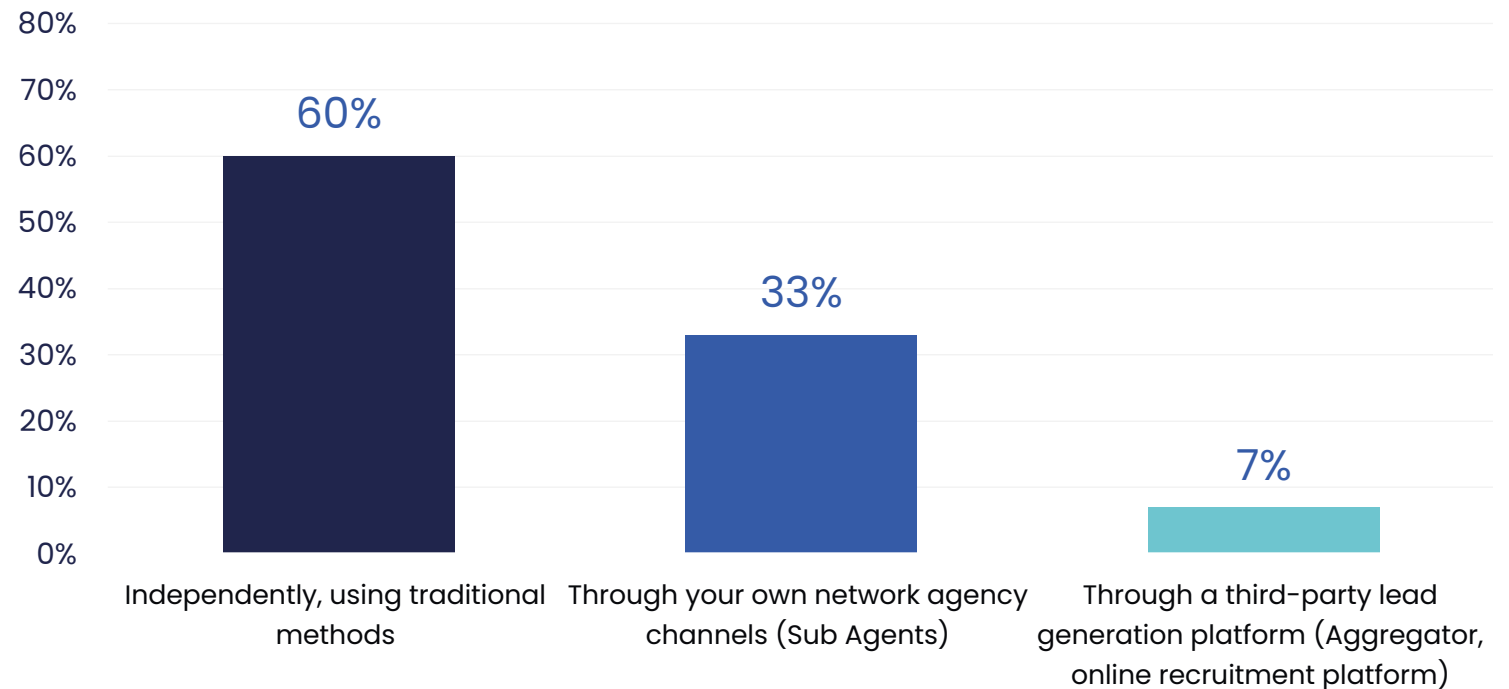How have commission or payment structures changed over the past 24 months?

Legend: ■ Unchanged ■ Decreased ■ Increased ■ Offered other financial incentives ■ Offered other non-financial incentives

Work & Travel/ Cultural Exchange Programmes: 9% | 9% | 4% | 1%

Graduate MBA: 15% | 10% | 7% | 2%

Foundation, Pathway Programmes, Undergraduate: 20% | 10% | 9% | 1%

Certificate / Vocational / Diploma: 16% | 9% | 9% | 3%

Secondary / Kindergarten-12: 9% | 8% | 7% | 2%

Language: 14% | 12% | 8% | 2%

X-axis: 0% 25% 50% 75% 100%

Commission rates per course

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

Legend: None | 0-10% | 11-20% | 21-30% | 31-40% | Other structure/ incentives

- Work & Travel/ Cultural Exchange Programmes
- Graduate MBA
- Foundation, Pathway Programmes, Undergraduate
- Certificate / Vocational / Diploma
- Secondary / Kindergarten-12
- Language

0% | 25% | 50% | 75% | 100%
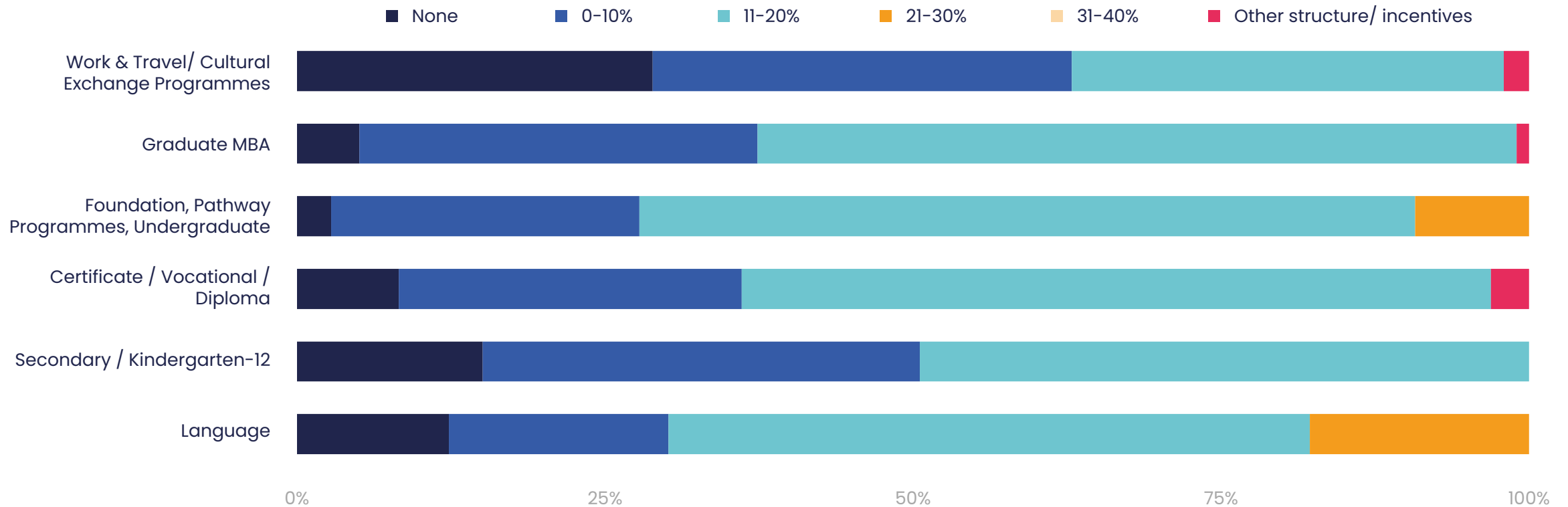
Student Recruitment Methods

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

Bar chart:
- Independently, using traditional methods: 60%
- Through your own network agency channels (Sub Agents): 33%
- Through a third-party lead generation platform (Aggregator, online recruitment platform): 7%

Application Methods

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

68% — Independently, using traditional methods
25% — Through your own network agency channels (Sub Agents)
8% — Through a third-party lead generation platform (Aggregator, online recruitment platform)
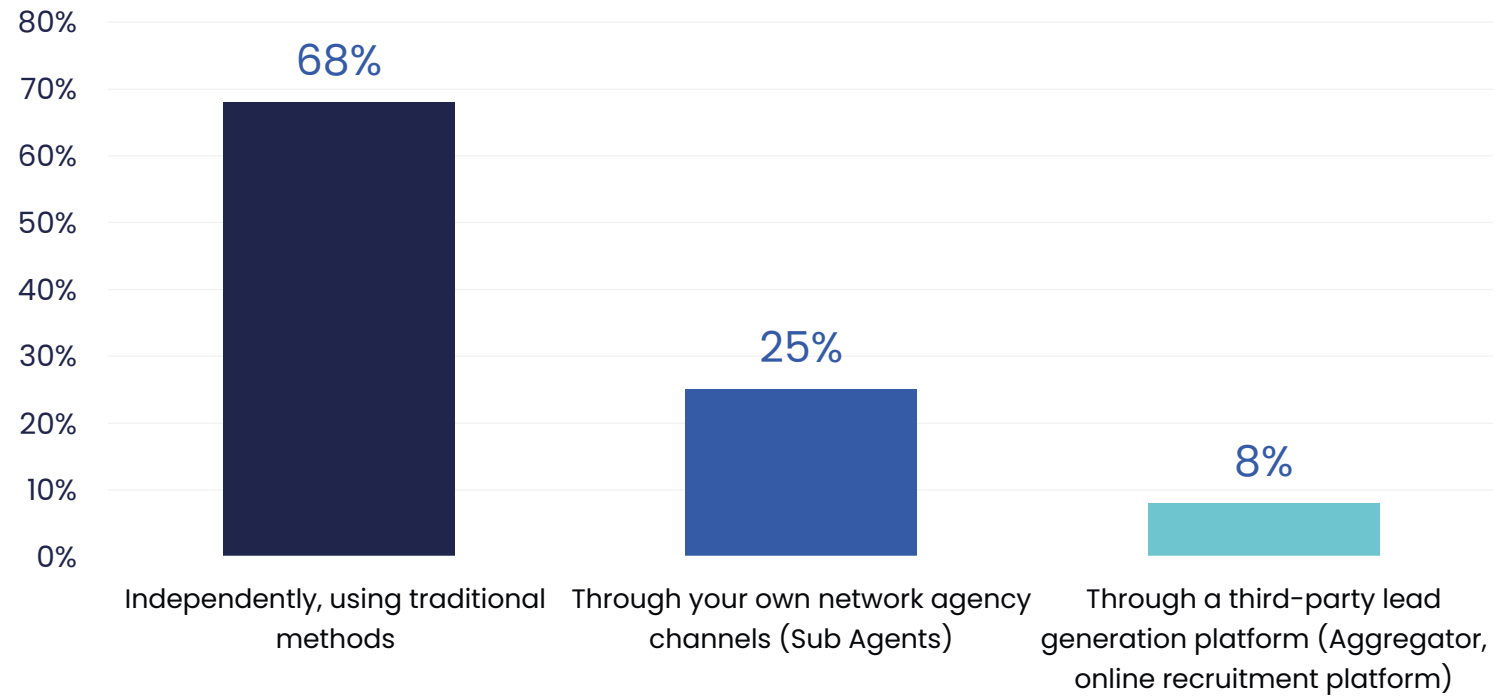
Tuition Payment Services

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%
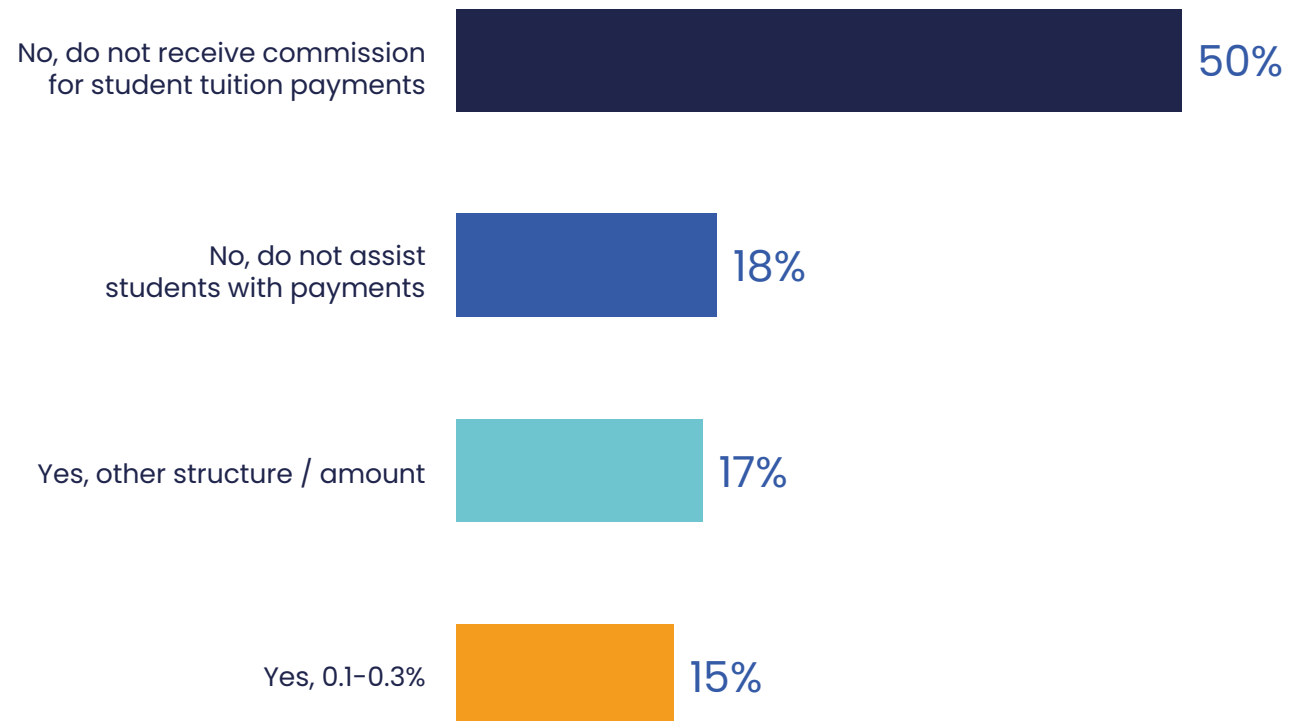
Tuition Payment Services

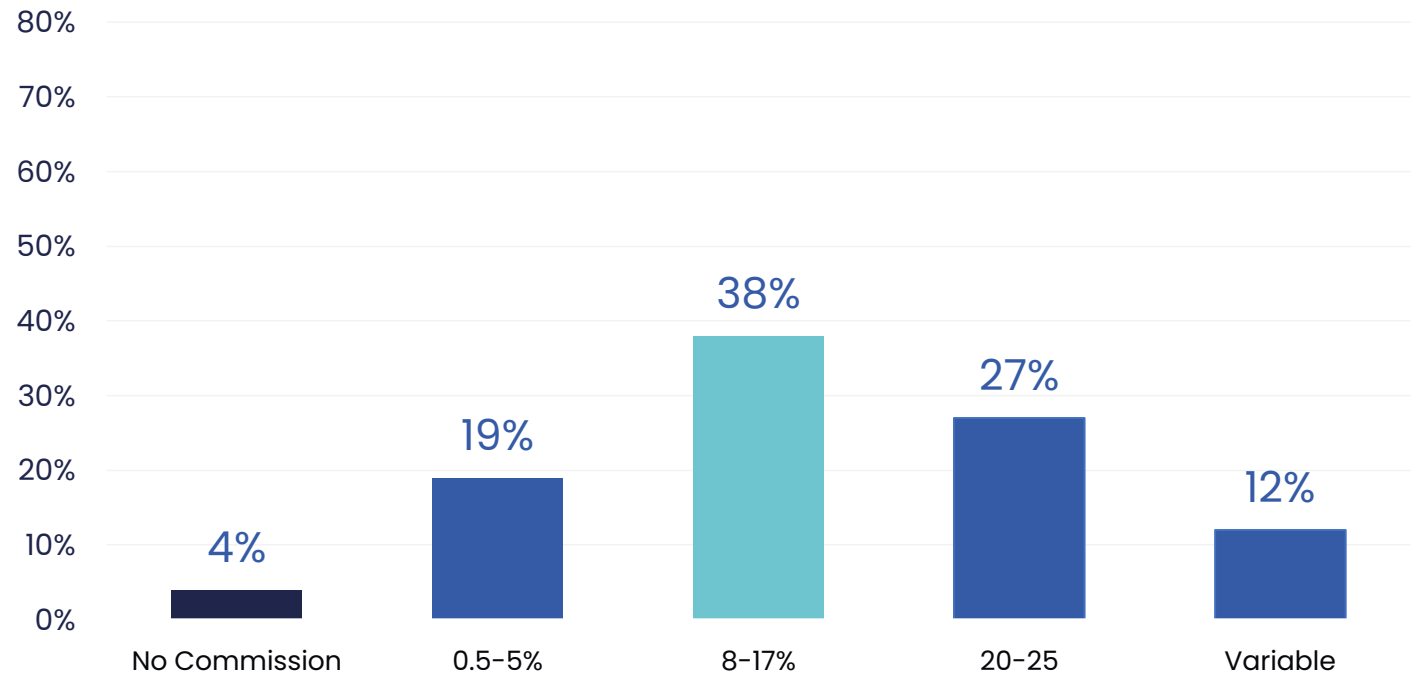Which platform are you using to assist students with payments to the institutions?

ONLINE BANKING

flywire

SALLIE

DECELOP

LOCAL BANK

PAUL MERCHANTS

TRANSFERMATE

WISE

IT CHANGES FOR EACH COUNTRIES. PERSONAL PAYMENT SYSTEMS OF UNIVERSITIES ARE PREFERABLE

BANKS & THOMAS COOK

CURRENCY BIRD

COHORT GO

NEXPAY

PAY TO STUDY / WESTERN UNION / TRANSFER WIRE

EBIXCASH WORLD MONEY LIMITED

Tuition Payment Commission

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

No, do not receive commission for student tuition payments — 50%

No, do not assist students with payments — 18%

Yes, other structure / amount — 17%

Yes, 0.1–0.3% — 15%

Tuition Payment Commission

"Yes, other structure/amount"

Chart data:
- No Commission: 4%
- 0.5-5%: 19%
- 8-17%: 38%
- 20-25: 27%
- Variable: 12%

Commission Payment Management

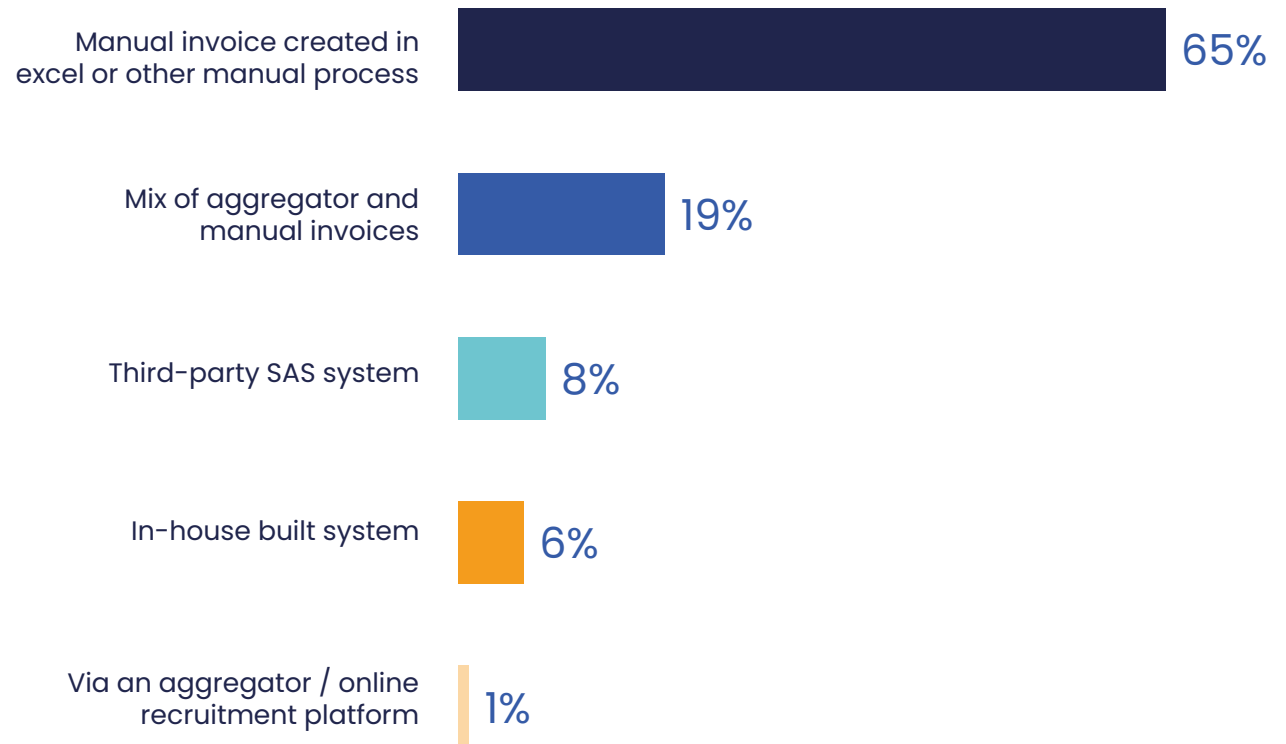Do you use a CRM system or any software to **manage commission payments** from institutions?

No, manual process	67%
Yes, in-house built system	23%
Yes, third-party SAS system	8%
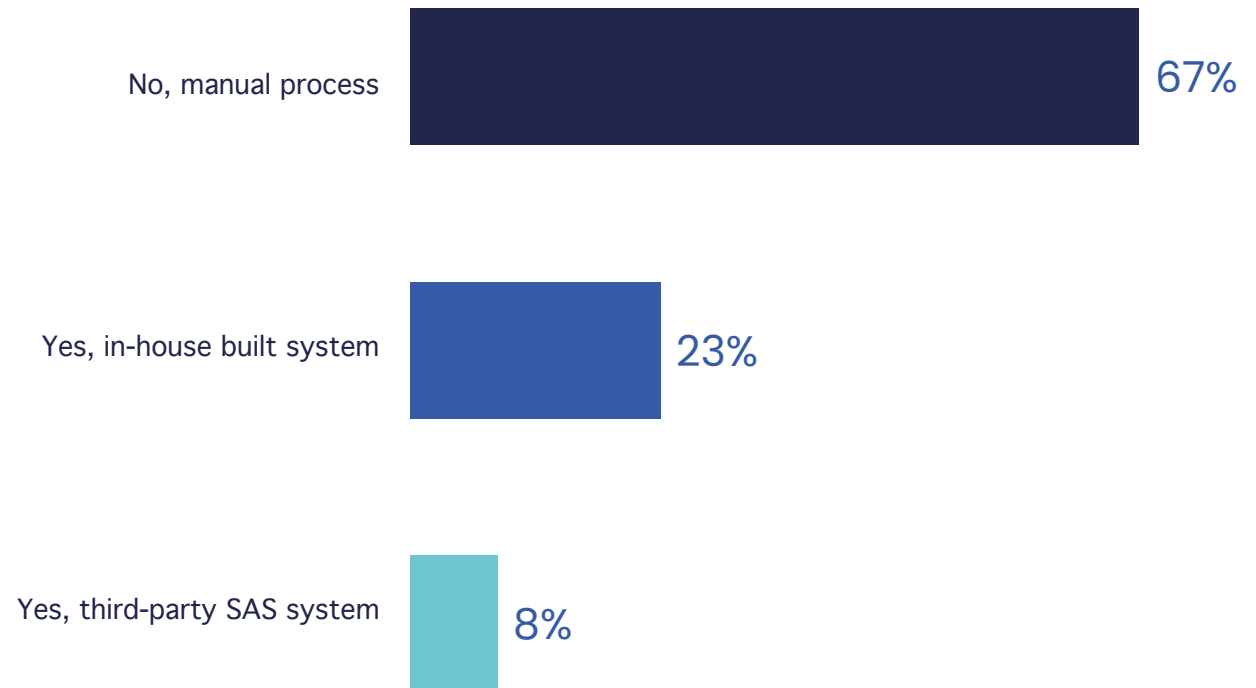
Commission Payment Management

"Yes, third-party SAS system"

CONTASIMPLE

EDVISOR

APPLYBOARD

HUBSPOT

ZOHO BIGIN

MONDAY

XERO

CENTRAL BANK OF NEPAL, RECOGNIZED INSTITUTIONS

NEXPAY

EDVOY
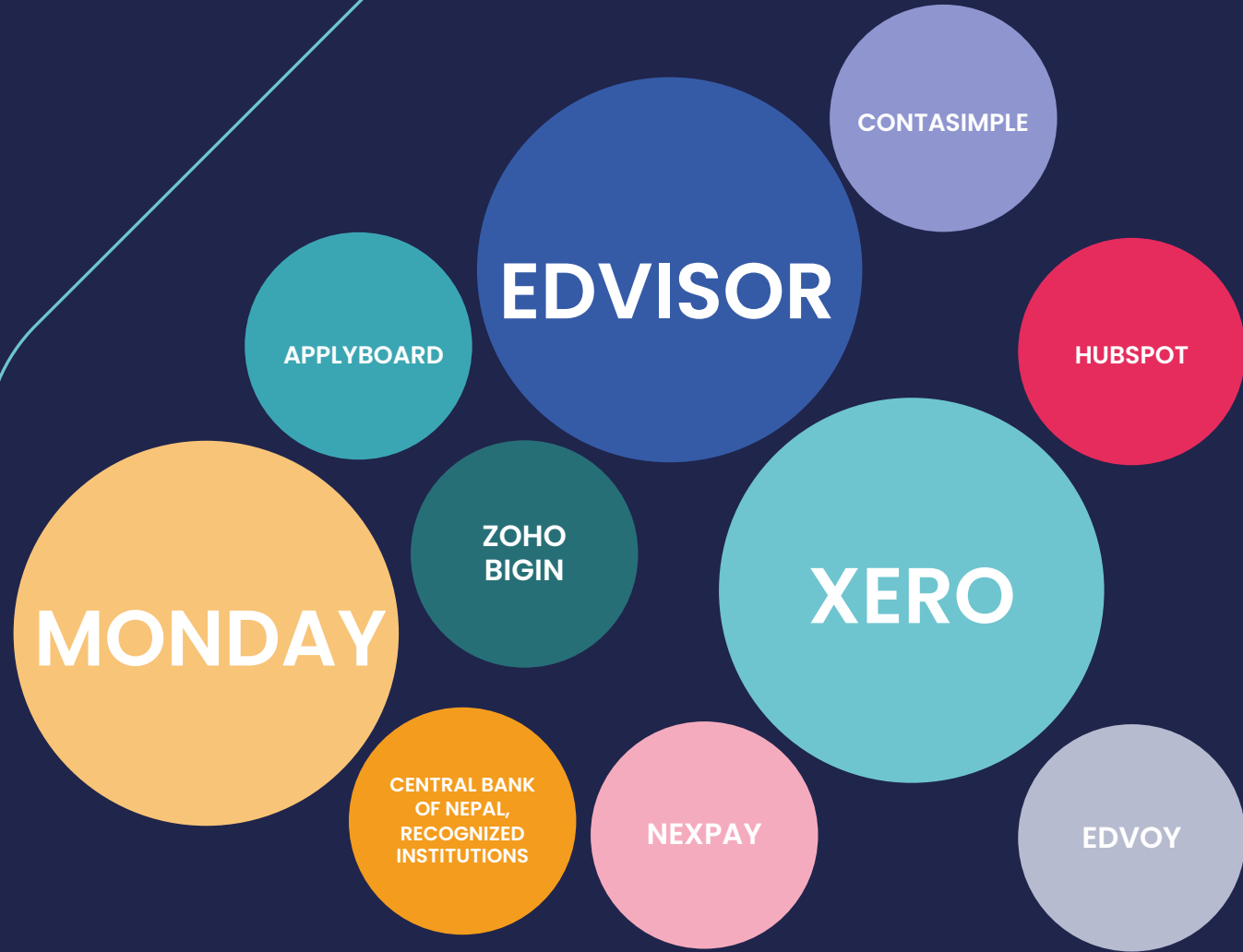
Commission Withdrawal Method

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

Category	Percentage
Manual invoice created in excel or other manual process	65%
Mix of aggregator and manual invoices	19%
Third-party SAS system	8%
In-house built system	6%
Via an aggregator / online recruitment platform	1%

Student Information Management

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

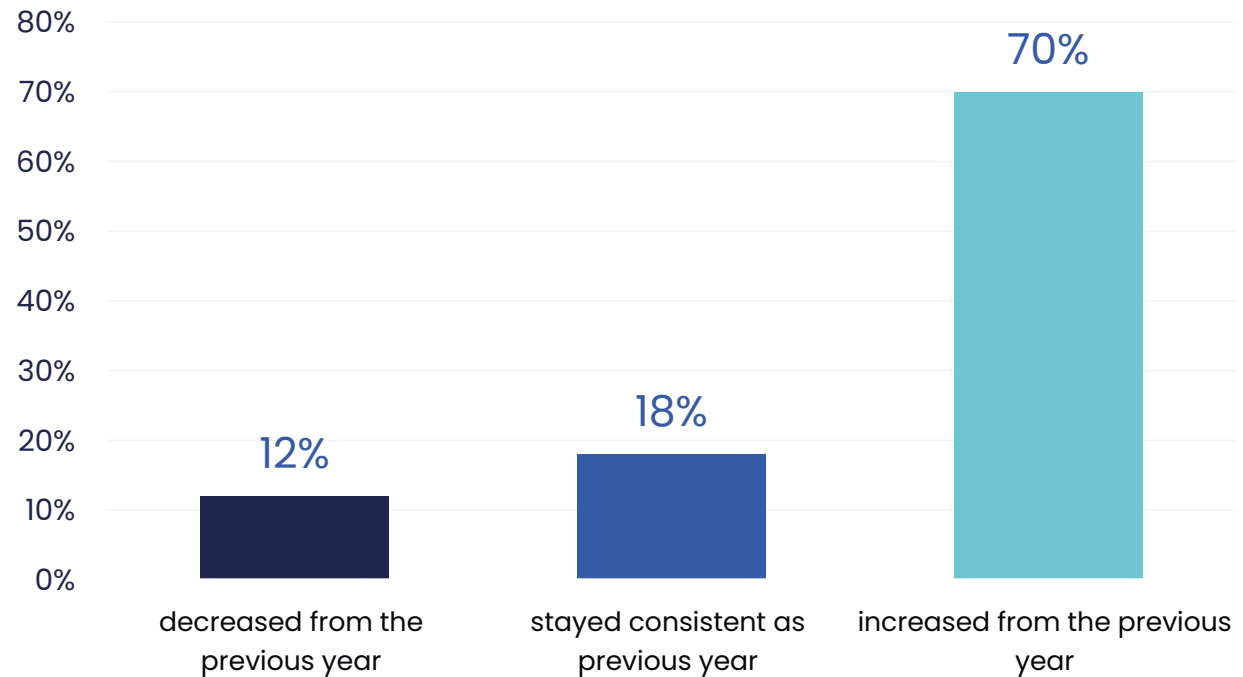|	
Yes, third-party SaS system	28%
Yes, in-house built system	33%
No, manual process	39%
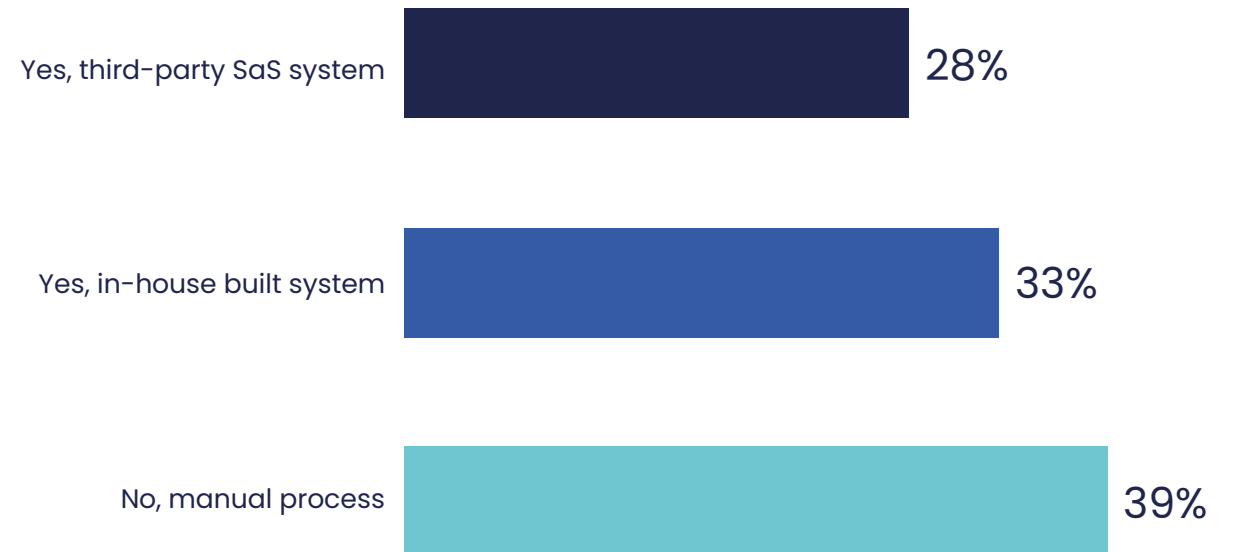
4. Digital Marketing
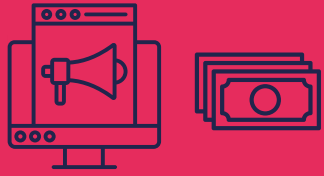
Digital marketing budget

In the past year, has your digital marketing budget;

	80%
70%	
60%	
50%	
40%	
30%	
20%	18%
12%	
10%	70%
0%	

decreased from the previous year stayed consistent as previous year increased from the previous year
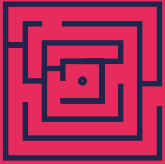
Challenges in digital marketing

What are the biggest challenges you face with your digital marketing?

Challenge	Percentage
Maintenance - keeping the data up to date	53%
Lack of budget	43%
Lack of expertise	40%
Lack of time to implement	34%
Campaigns conflict with partner institutions (e.g. bidding on same keywords)	24%
Don't utilise any digital marketing.	5%
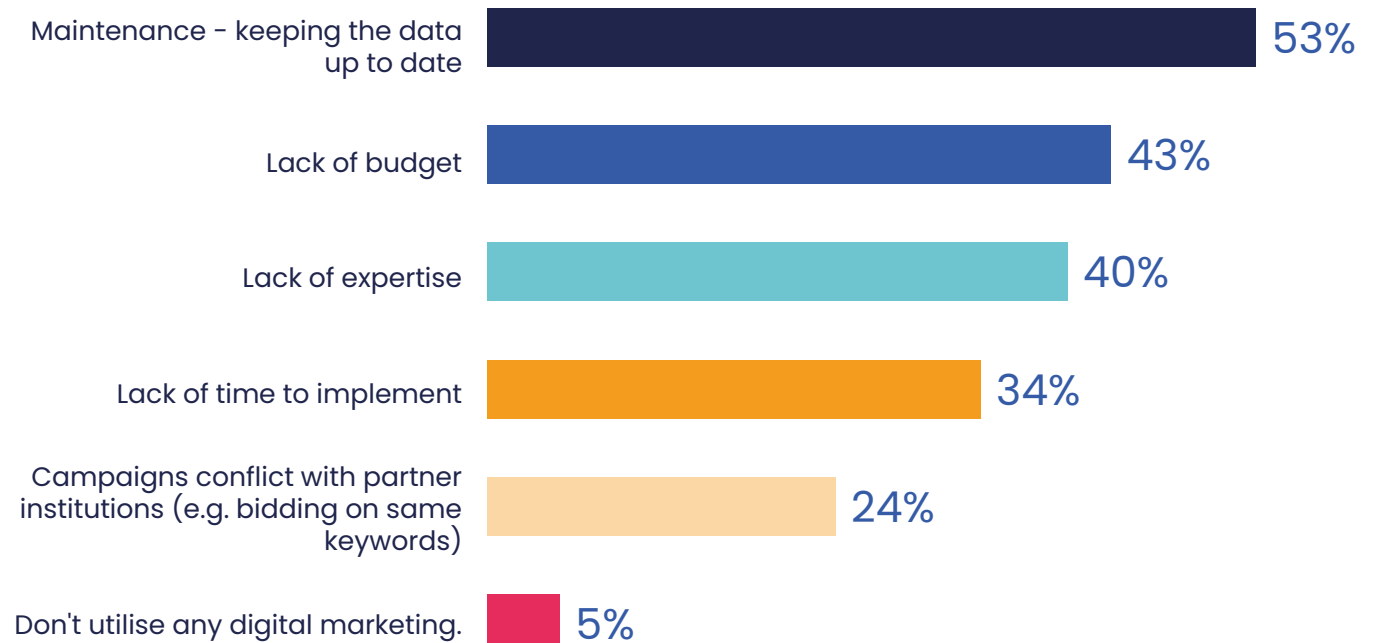
Additional services offered

Do you offer of the following services on behalf of partner institutions?

| Service	Percentage
Social Media	71%
Email	51%
Search Engine Optimisation	27%
None	24%
AdWords	18%
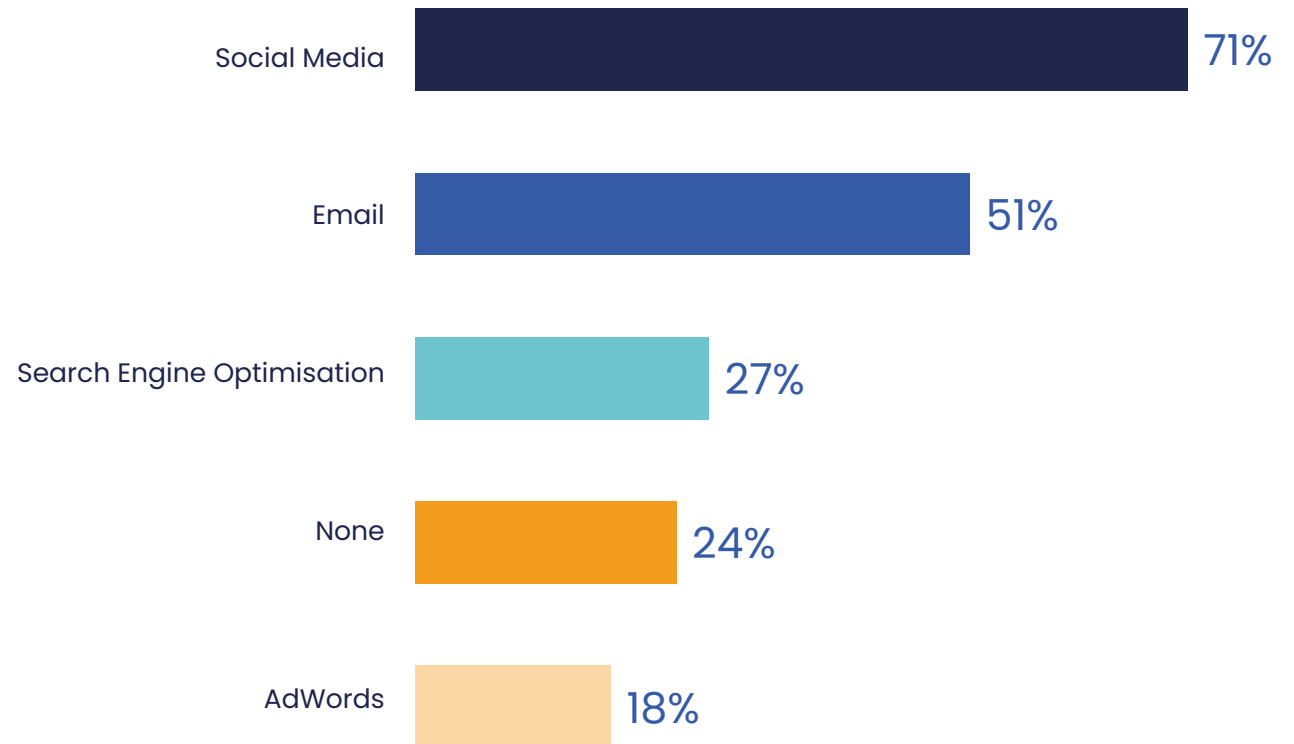
5. Study Destinations & Visa Approval Rates

Student interest by country

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

TOP 4
INCREASED
INTEREST

■ DECREASED interest in this market   ■ MAINTAINED interest in this market   ■ INCREASED interest in this market
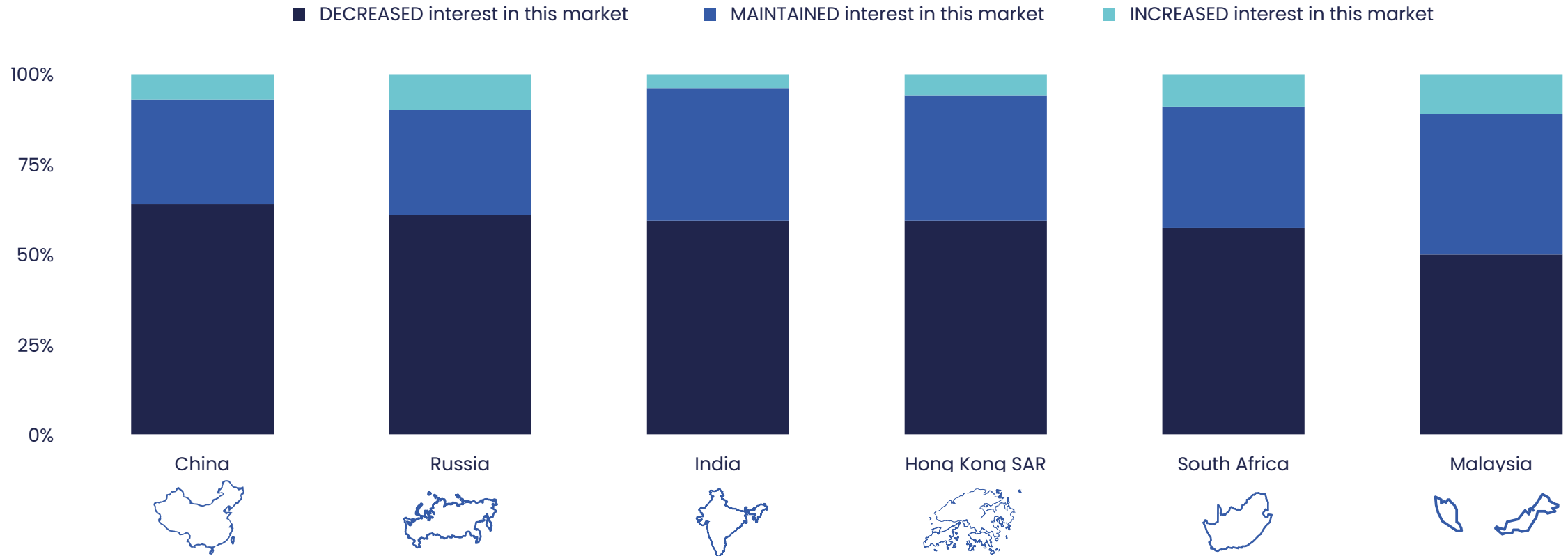

ICEF Agent Voice 2022

Student interest by country

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

TOP 6
DECREASED
INTEREST

■ DECREASED interest in this market   ■ MAINTAINED interest in this market   ■ INCREASED interest in this market

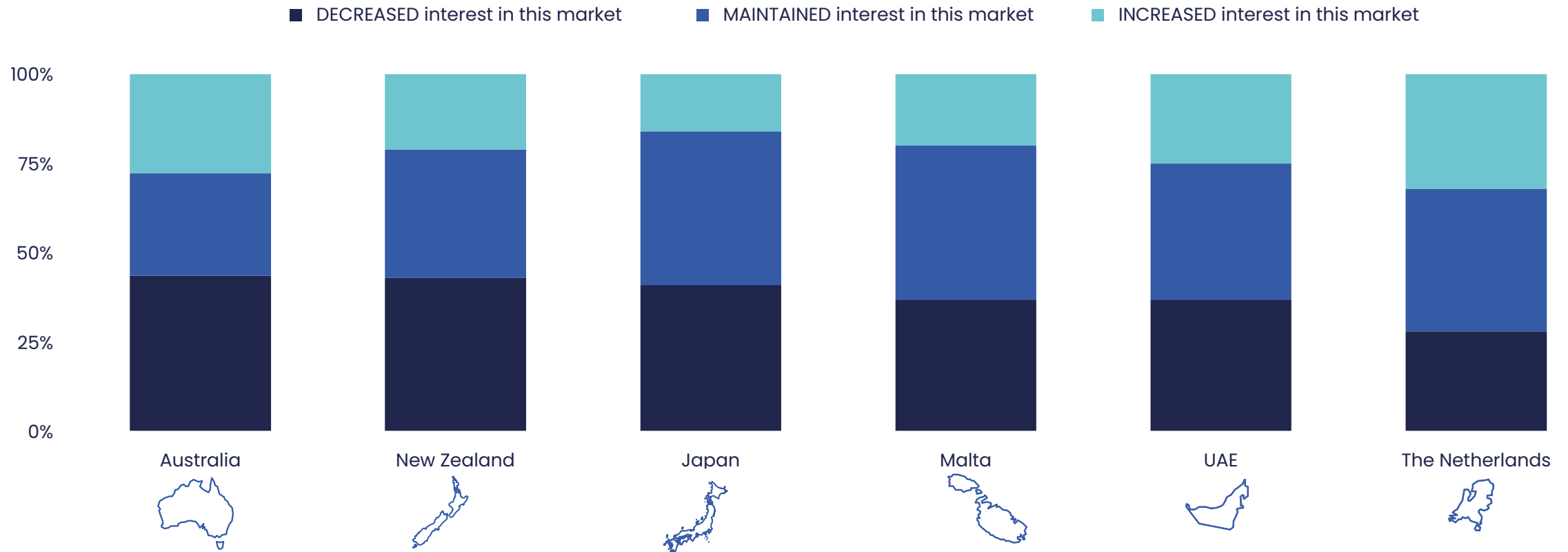China   Russia   India   Hong Kong SAR   South Africa   Malaysia

ICEF Agent Voice 2022

Student interest by country

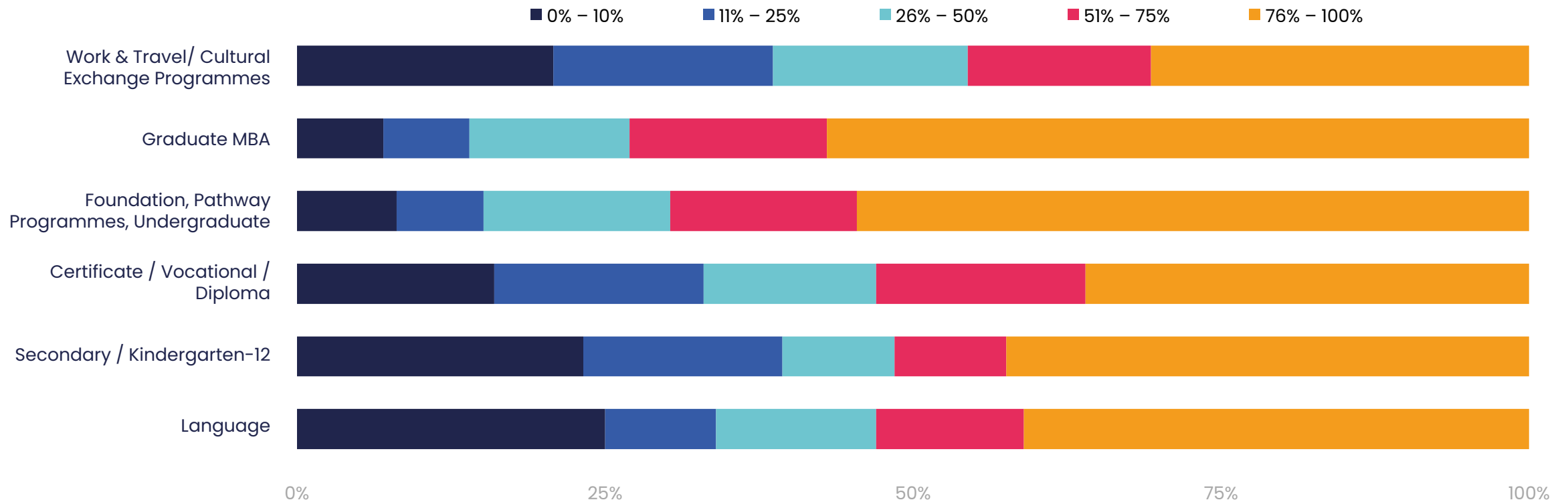Over the last 2 years, how has students' interest in the following study destination countries changed?

■ DECREASED interest in this market   ■ MAINTAINED interest in this market   ■ INCREASED interest in this market

ICEF Agent Voice 2022
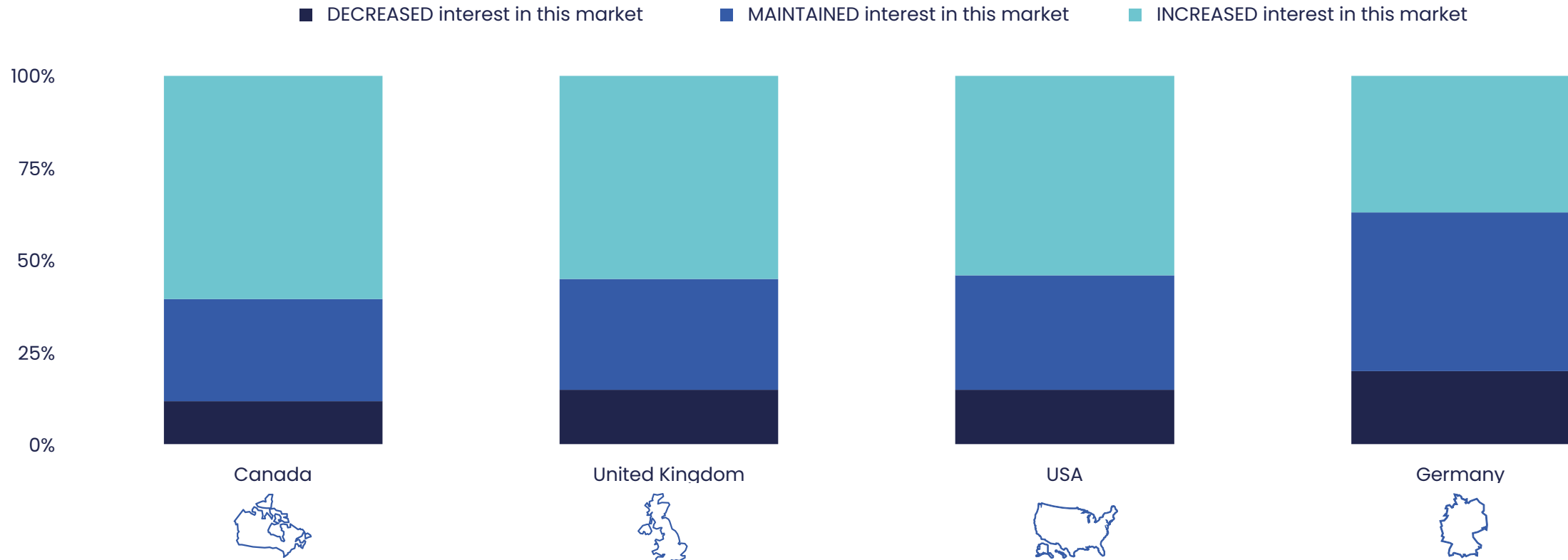
Visa approval rate by country
– United Kingdom

Approximately what percentage of student visa applications are approved?

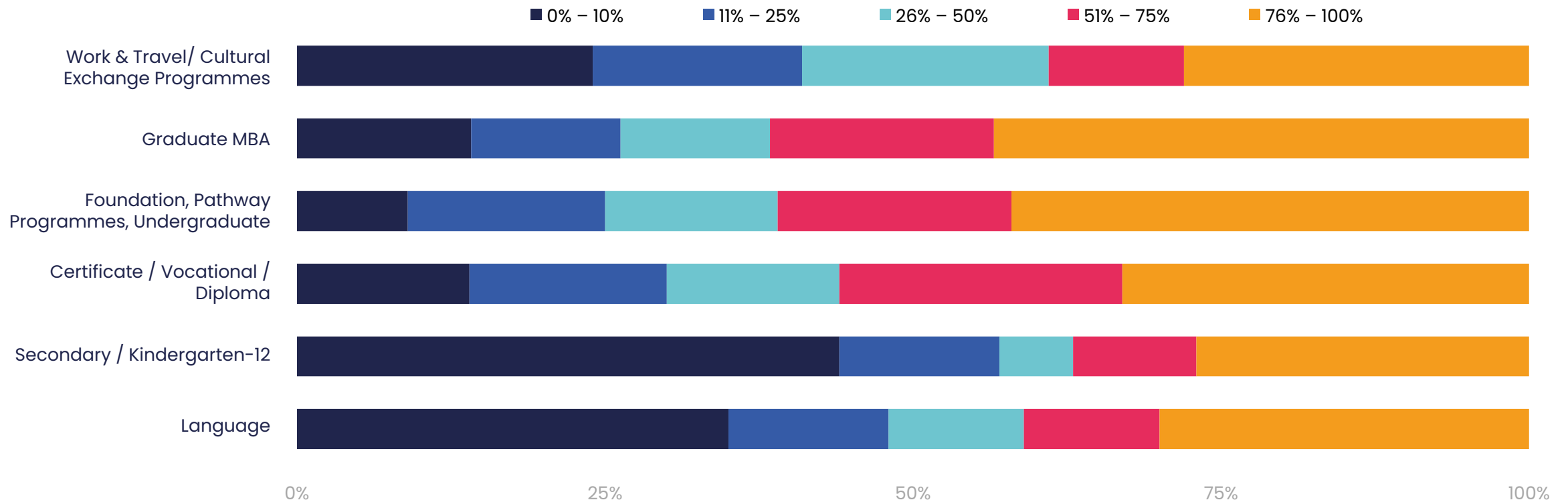Legend: ■ 0% – 10% ■ 11% – 25% ■ 26% – 50% ■ 51% – 75% ■ 76% – 100%

Categories (top to bottom):
- Work & Travel/ Cultural Exchange Programmes
- Graduate MBA
- Foundation, Pathway Programmes, Undergraduate
- Certificate / Vocational / Diploma
- Secondary / Kindergarten-12
- Language

Axis: 0%, 25%, 50%, 75%, 100%

Visa approval rate by country
– Australia

Approximately what percentage of student visa applications are approved?

Legend: 0% – 10% | 11% – 25% | 26% – 50% | 51% – 75% | 76% – 100%

Categories (top to bottom):
- Work & Travel/ Cultural Exchange Programmes
- Graduate MBA
- Foundation, Pathway Programmes, Undergraduate
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- Secondary / Kindergarten-12
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Axis: 0% | 25% | 50% | 75% | 100%
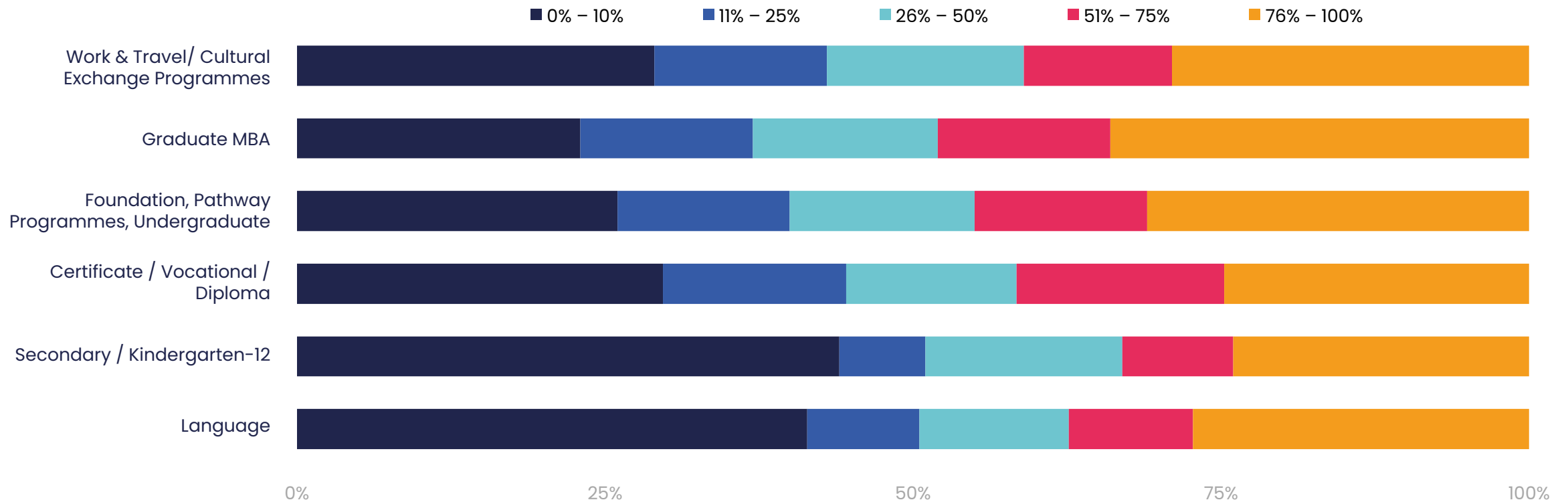
Visa approval rate by country – USA

Approximately what percentage of student visa applications are approved?

Legend: ■ 0% – 10% ■ 11% – 25% ■ 26% – 50% ■ 51% – 75% ■ 76% – 100%

Category	0%–10%	11%–25%	26%–50%	51%–75%	76%–100%
Work & Travel/ Cultural Exchange Programmes					
Graduate MBA					
Foundation, Pathway Programmes, Undergraduate					
Certificate / Vocational / Diploma					
Secondary / Kindergarten-12					
Language					

Axis: 0%, 25%, 50%, 75%, 100%
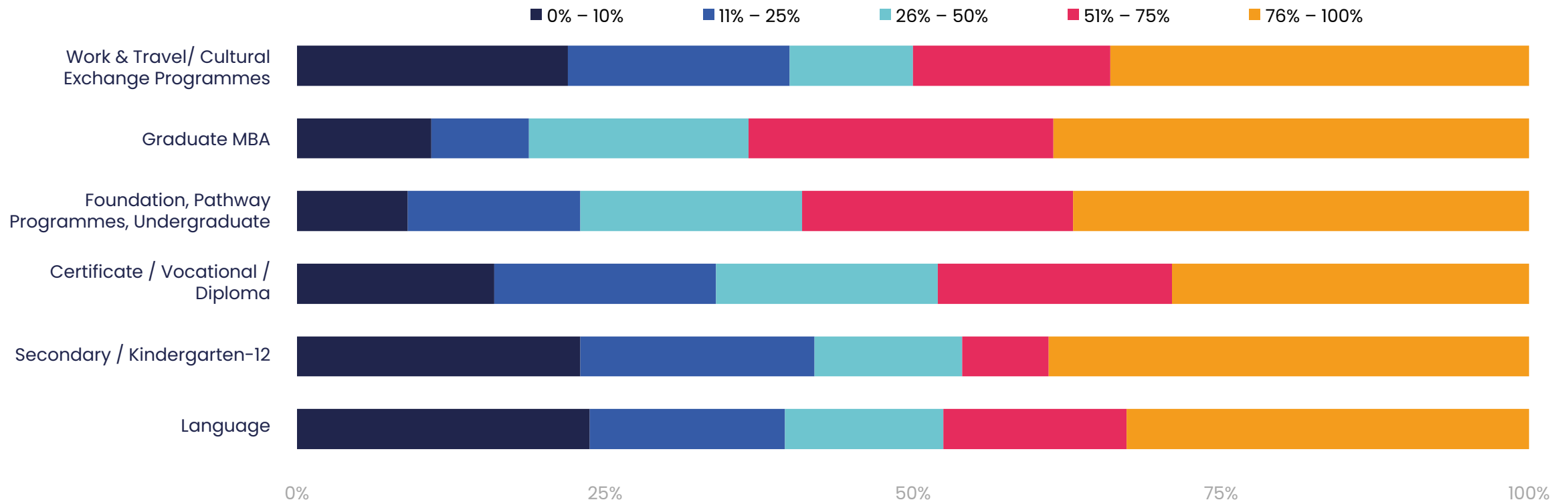
Visa approval rate by country
– Canada

Approximately what percentage of student visa applications are approved?

Legend: ■ 0% – 10% ■ 11% – 25% ■ 26% – 50% ■ 51% – 75% ■ 76% – 100%

Work & Travel/ Cultural Exchange Programmes

Graduate MBA

Foundation, Pathway Programmes, Undergraduate

Certificate / Vocational / Diploma

Secondary / Kindergarten-12

Language

0%   25%   50%   75%   100%
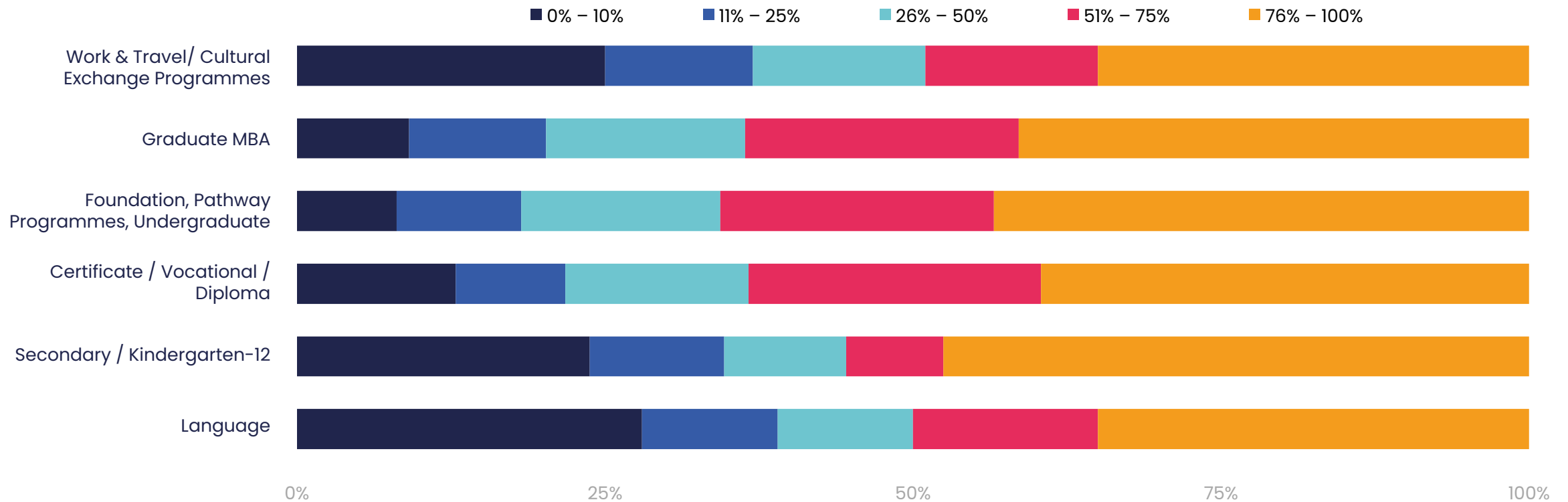
Summary

- There is much to be positive about post-pandemic, with a strong appetite for international education being reported

- Some countries will bounce back sooner than others, with opportunities for newer destinations to steal market share

- Adoption and promotion of online/hybrid education has accelerated

- Flexibility seen as key driver for new enrolments: admissions processes; delivery of education, as well as with payments, and payment terms

- Visa approval rates a concern, globally

Thank you

Any questions, comments?

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nstevenson@icef.com
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