

Future trends:
What is there to be certain about
in an era of uncertainty?

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About INTO University Partnerships

IN PARTNERSHIP WITH LEADING UNIVERSITIES

31

PARTNERSHIPS

150K

STUDENTS ENROLLED

180

SOURCE COUNTRIES

93%

STUDENT SATISFACTION

100+

UNIVERSITY RELATIONSHIPS

£2B

ECONOMIC IMPACT

BUILDING CAPACITY THROUGH

Partnership solutions

 Comprehensive on-campus

 Customised service offers

 Recruitment

Services

 International student recruitment

 Pathway programme, design and delivery

 In-market presence

 Employability support

 AI-powered admissions

 Transnational education

 Insight and analytics

 Articulation and recognition



Major themes from INTO Global Agent survey

based on responses of 1240 agents across the globe in spring 2024

Significant flux and uncertainty

Shifting sentiment away from 'big 4' destinations

Rising interest in alternative destinations

Asia and Europe continue their rise as destinations

Multi-destination student counselling

Engaging and supporting market generalists

Rising challenge of affordability

Coupled with importance of return on investment

When rankings are important

Global nature of counselling appears to be creating consolidation in rankings used

Service and timely responses are critical

Consistently most important factors for a productive relationship with recruitment partners

Importance of training and accreditation

Quality of recruitment landscape will be underpinned by AQF and training programmes

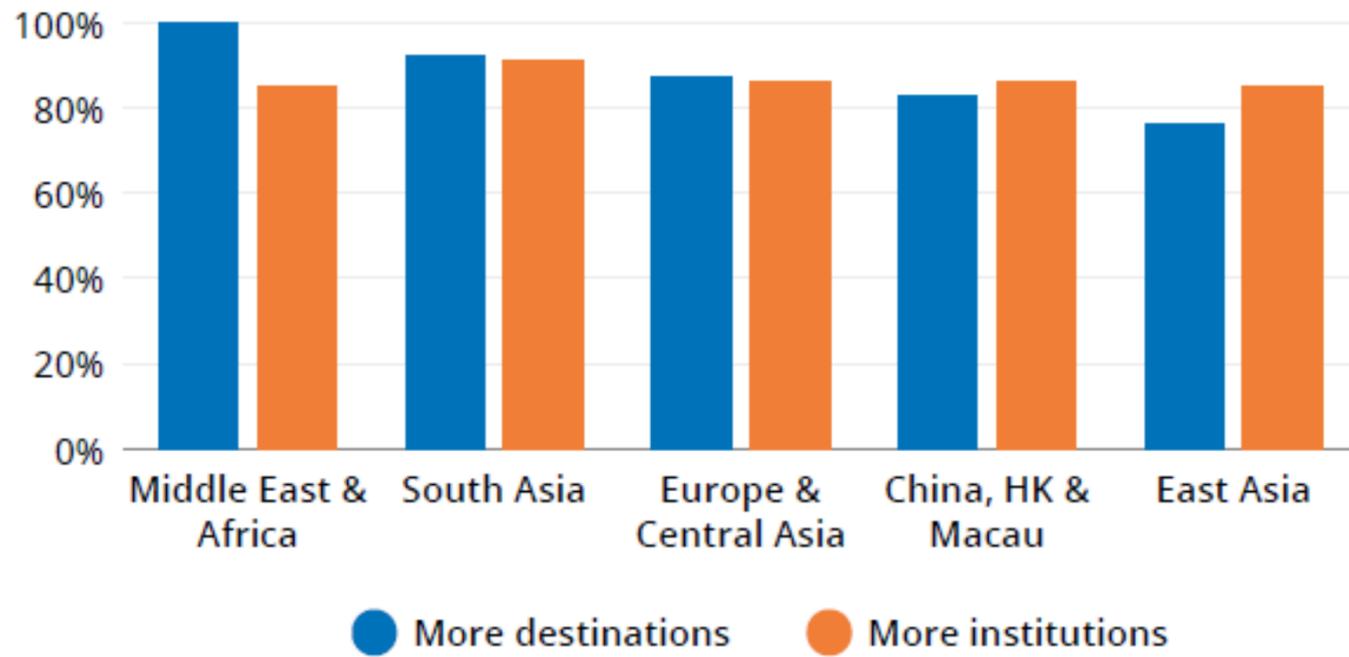


Full report available
via the QR code

Uncertainty incentivizing consideration of study abroad options

And there will be ongoing uncertainty around all 'big 4' markets into 2025

> Almost 9 in 10 agents agree in the past year students have applied to more destinations and institutions



Source: INTO Global Agent Survey 2024



More applications
Delayed decisions
Noise in the system
Pressure on conversion

Importance on

Clear and transparent process
Timely and responsive
Quality information, advice and guidance

Regional pivots characterise demand for alternative destinations

Rising attractiveness for non-'big 4' destinations driven by both push and pull factors

Destinations cited as increasingly attractive to students (by agency location)

Agency location	Europe excl. UK	China	South East Asia	Other Asia	Middle East	Other
China, HK & Macau	23%	7%	56%	44%	0%	0%
East Asia	61%	27%	17%	32%	1%	3%
Europe & Central Asia	57%	6%	6%	9%	31%	11%
Middle East & Africa	93%	10%	3%	3%	3%	0%
South Asia	91%	0%	10%	4%	12%	3%

Source: INTO Global Agent Survey 2024

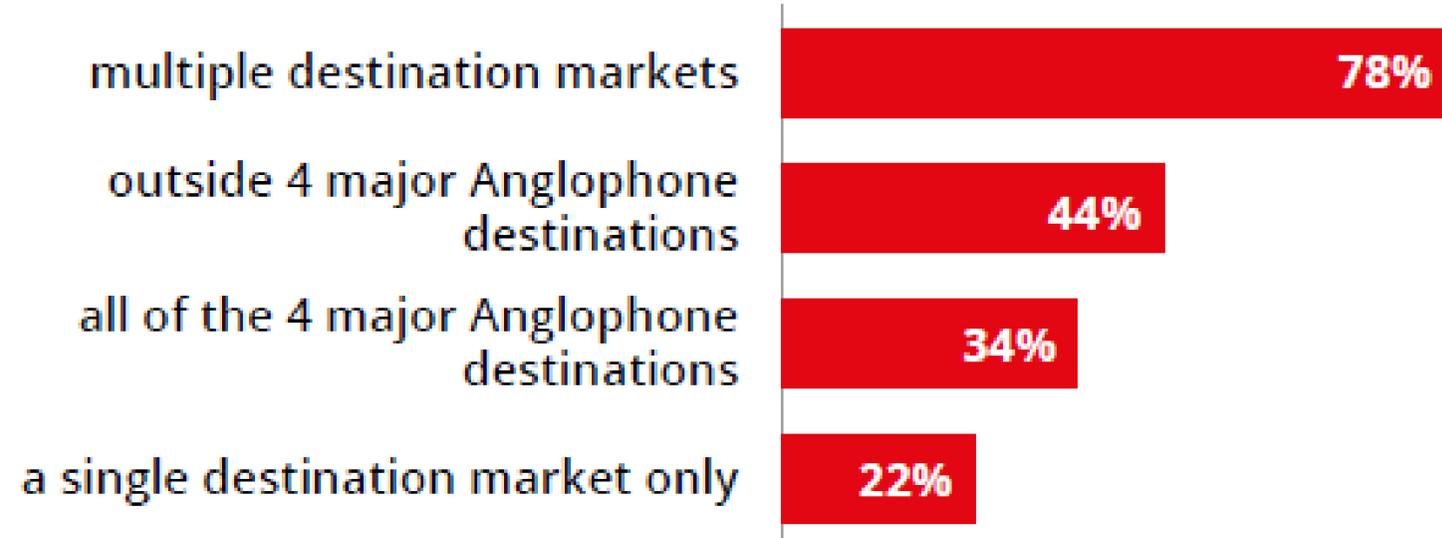


Agents listed countries across multiple regions, so each set of responses doesn't equal 100%

Study abroad counselling is multi-destination in nature

University and destination USPs need clear articulation in a crowded landscape

> During last year surveyed counsellors placed students in...



1 in 5

submitted applications to **60+** universities or colleges

1 in 10

submitted applications to **100+** universities or colleges

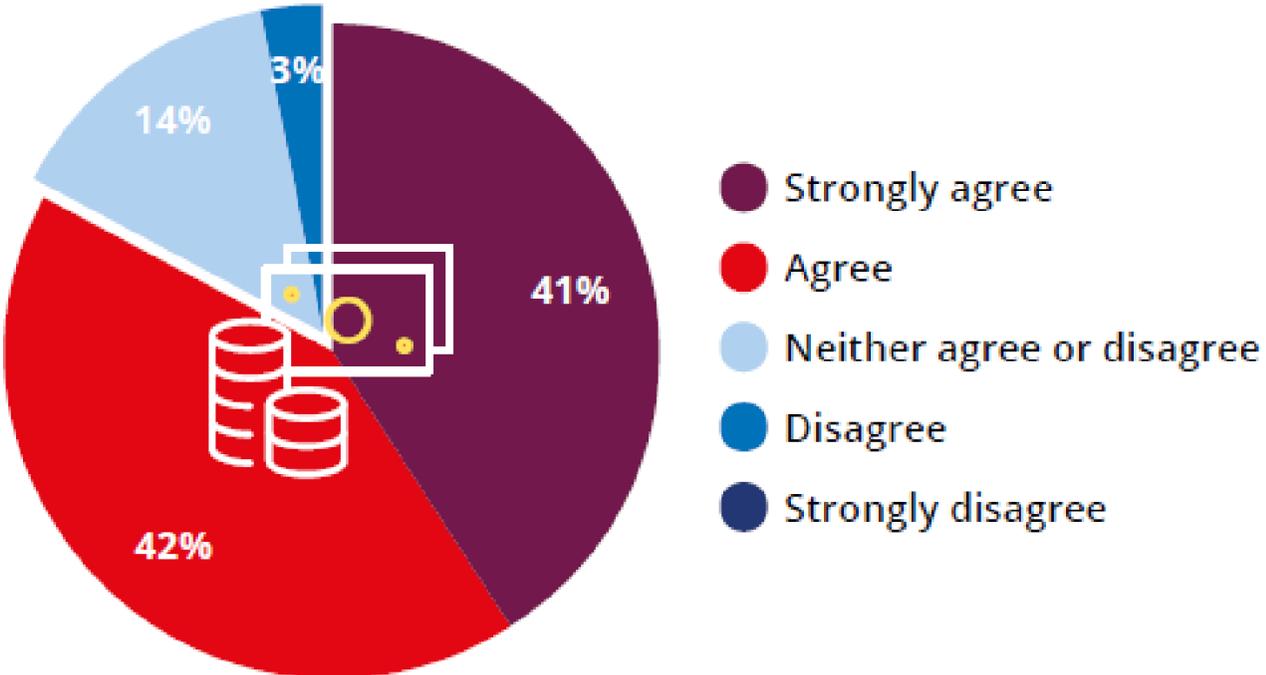
Source: INTO Global Agent Survey 2024

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Cost of living challenges globally will influence demand

Affordability and ROI will shape options considered and financing available

> 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

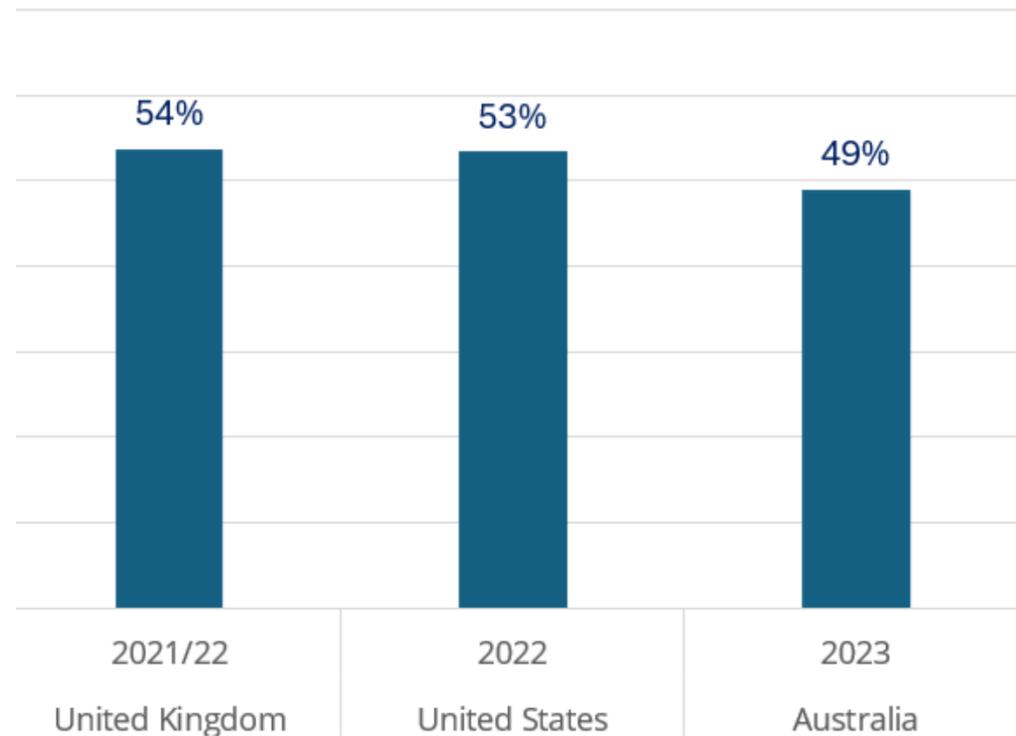


Universities have high reliance on a single source region

Diversification to protect financial sustainability will be competitive

% of degree starts at universities
in QS World top 200

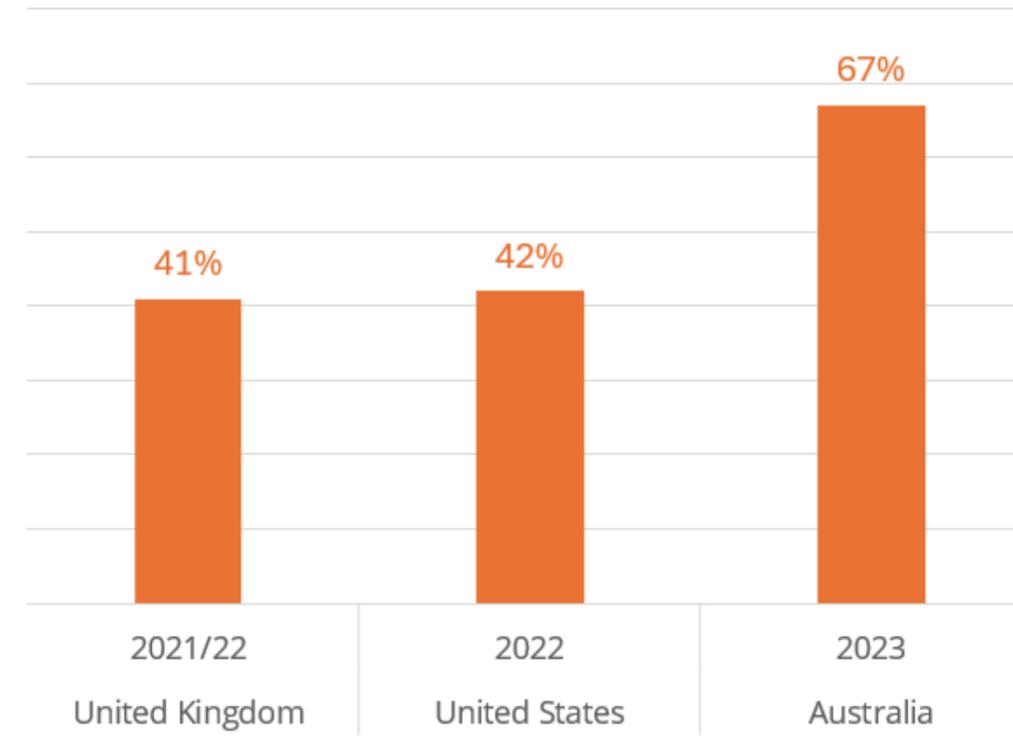
■ from China & HK



Challenged by geo-politics / domestic HE investment

% of degree starts at universities
outside QS World top 200

■ from South Asia



Challenged by visa and employment regime/access

Source; INTO analysis of data available from Australian government, Higher Education Statistics Agency (UK) and Department for Homeland Security (USA)

Global competition for talent will be fierce

Labour market needs will shape landscape for international study opportunity

South Korea, Japan and Taiwan have demographic declines impacting on financial sustainability of higher education system.

Pursuing international growth with targeted scholarships for specific areas of strategic economic interest

Germany has implemented the latest stage of its Skilled Immigration Act, which introduces more part-time work rights for international students and easier routes for vocational study and work

Australia and Canada reforming international student visa regimes to better align with labour market needs

USA will need to balance immigration concerns with talent acquisition supporting technology ambitions

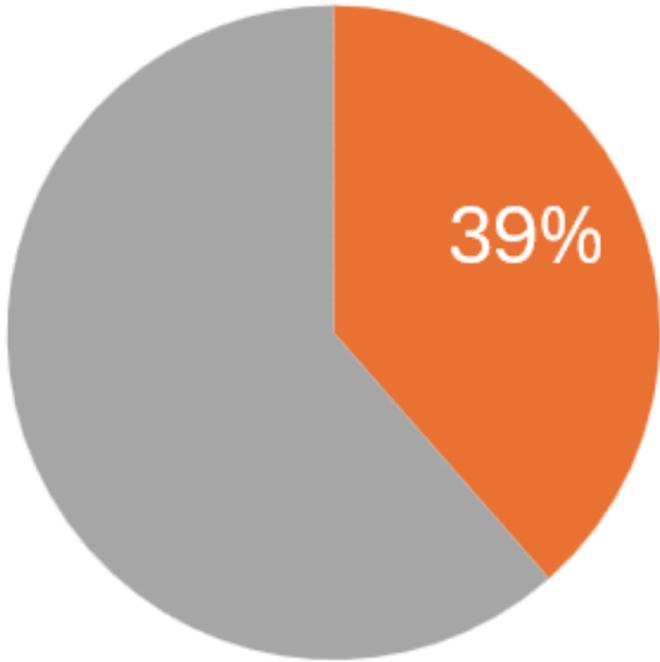
“Staple a green card to every diploma... Anybody graduates from a college, you go in there for two years or four years, if you graduate, or you get a doctorate degree from a college, you should be able to stay in this country,” “

Donald Trump, June 2024

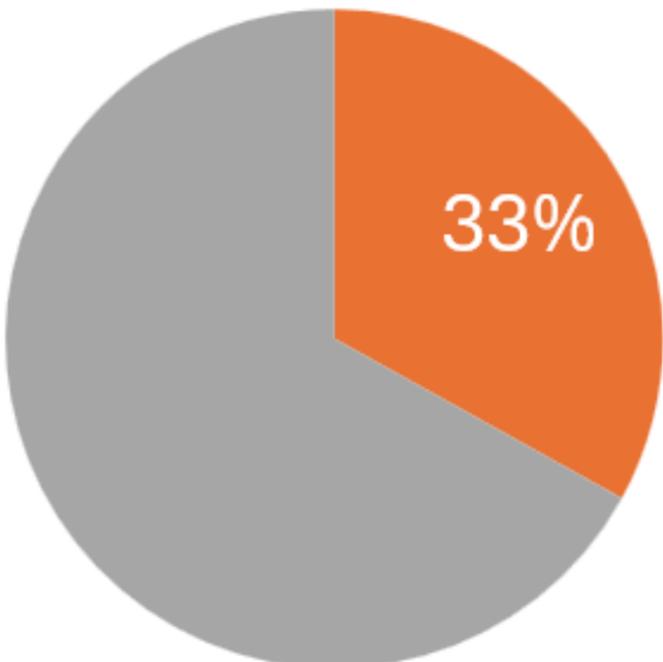
Global competition for talent will be fierce

United States post-study work environment already affected different pattern of demand

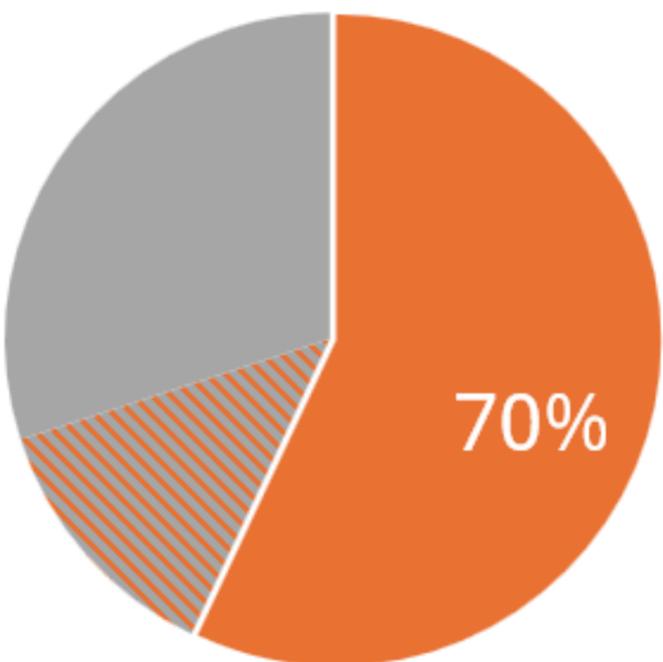
% of international students starting degrees in a STEM discipline by destination



Australia
2023



United Kingdom
2021/22



United States
2022

If including subjects with a STEM designation e.g. 'Business Analytics' also enabling 2 year extension to PSW rights

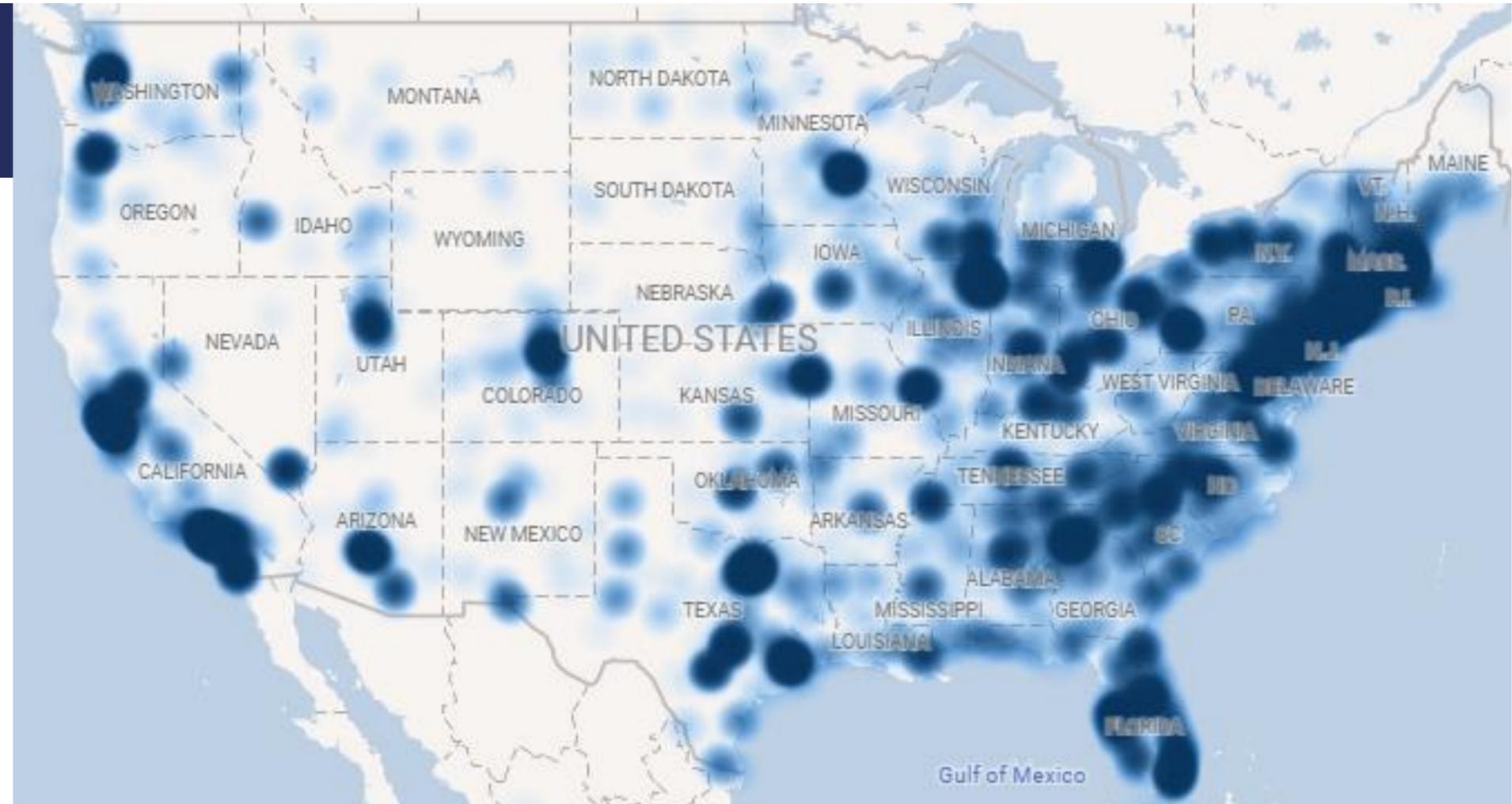
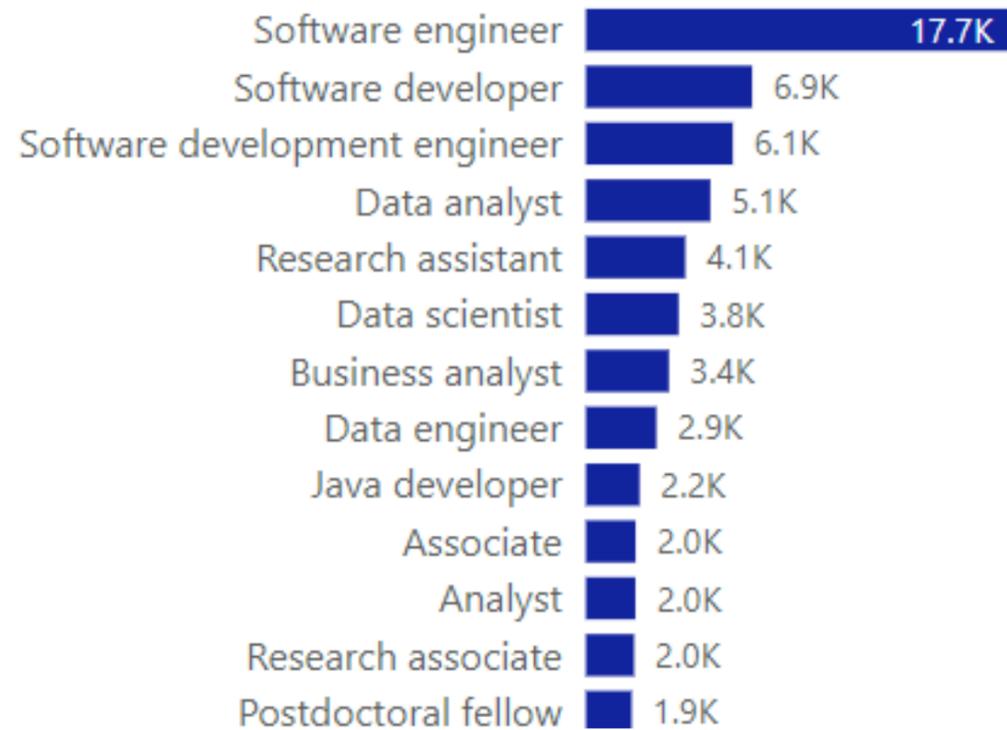
Source; INTO analysis of subject-related degree starts using data available from Australian government, Higher Education Statistics Agency (UK) and Department for Homeland Security (USA)

Evidencing employment outcomes will be essential

Return-on-investment, in-study and post-study work options all key influencing factors

Case study; US higher education can clearly evidence domestic employment outcomes

200,000 graduates were employed using OPT post-study work scheme in 22/23



Source; INTO analysis of Department for Homeland Security data on post-study work via Optional Practical Training

What can we be certain about in era of uncertainty

Important factors within control or influence

- Clear proposition in a global context
- Emerging growth markets require strategic approach to pricing
- Market presence and engagement
- Simplicity and timeliness of process with recruitment partners
- Evidence ROI / employment-related opportunity and outcomes (in-study and post-study)
- Partnerships that facilitate new pathways between national education systems