Navitas Agent Perception Report

Findings from Agent research conducted in March 2021

Agents continue to value openness and accessibility in 2021 as the pandemic progresses and perceptions become more entrenched.

Third round of Navitas Agent Perception Research is most comprehensive to date, capturing opinions of more agents in more countries on the impact of COVID-19 on international education.

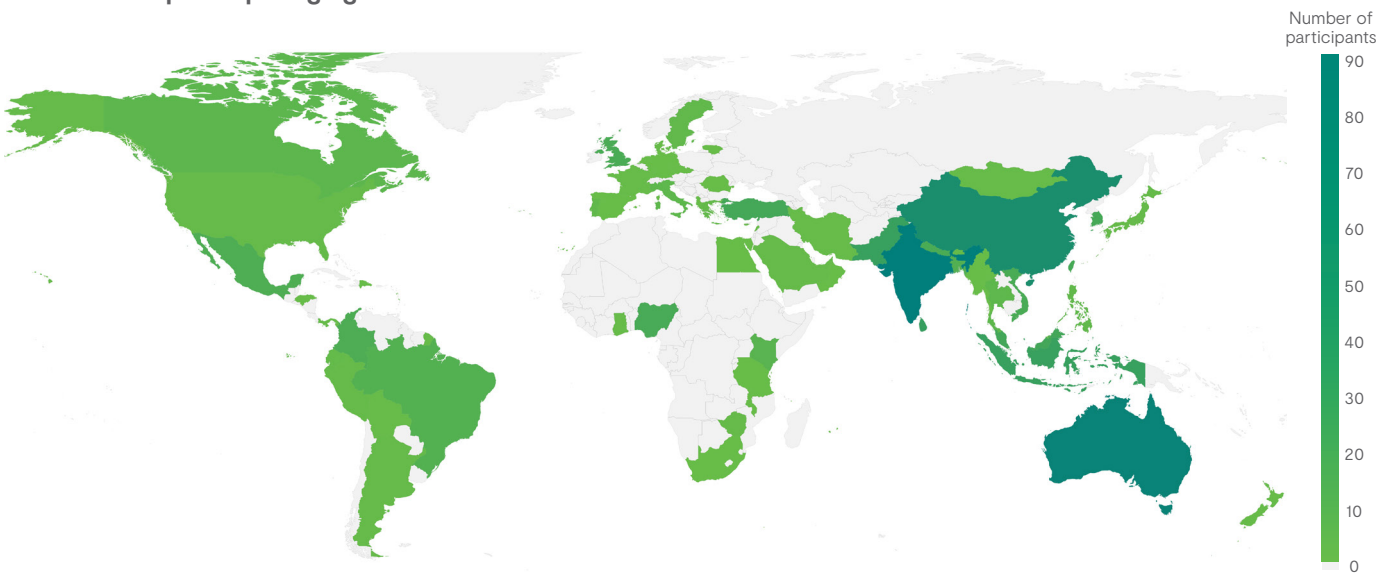
In May 2020, Navitas asked its agents to reflect on the relationship between the handling of the coronavirus pandemic by different countries, and the extent to which this made a country a more attractive study destination. We found that countries that had handled the health crisis well (Australia and New Zealand) were perceived to be more attractive study destinations and vice versa.

In September 2020 Navitas repeated its research, finding that governments' handling of the pandemic had become less of a differentiator for destination countries – Australia and New Zealand had fallen behind while the United Kingdom was the stand-out performer.

Our most recent research in March 2021 reveals that perceptions of Australia and New Zealand have become more entrenched, while the United Kingdom and Canada continue to look poised for a rebound and the US shows signs of a remarkable turnaround.

This most recent round is our most comprehensive sample of agent perception, capturing the views and opinions of nearly 900 agents in 73 countries around the world. Look out for the second part of this report which will consider variations in perception and outlook in different source country regions.

Countries of participating agents

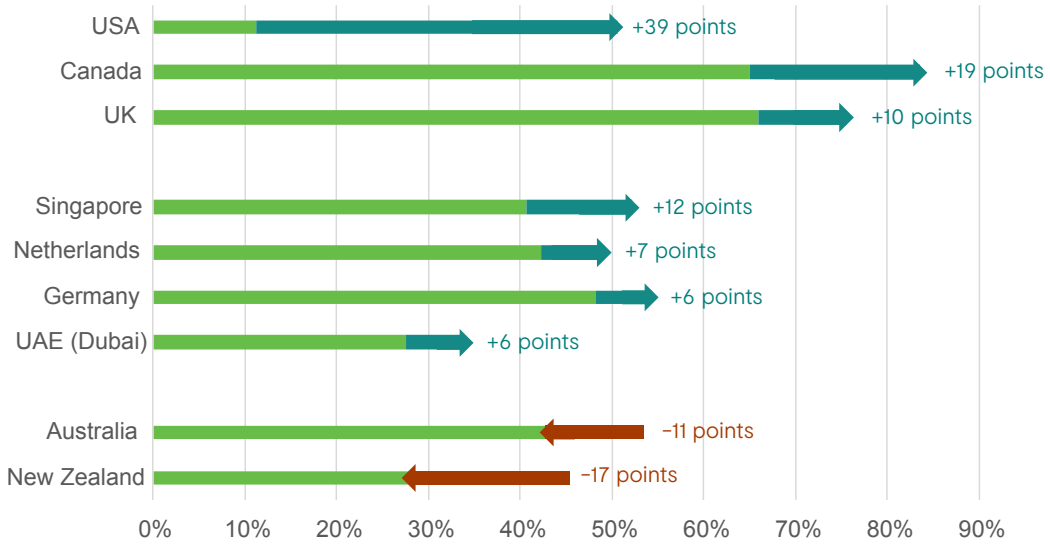


Executive Summary

The latest Navitas research reveals a deepening gap between the front runners and the laggards.

Countries, particularly Canada and the United Kingdom, that were ahead of the pack in September 2020 continue to improve their reputation as an appealing study destination, whereas those that remain constrained by closed borders are falling even further behind. On the measure of whether there has been more interest in an education destination, Canada and the UK are pulling ahead with +19 point and +10 point improvements in their scores respectively. At the other end of the spectrum, Australia and New Zealand have fallen to the bottom of the table having lost 11 points and 17 points respectively.

Fig E1: "Over the past two months, there has been more interest in this country as an education destination compared to other countries." Change from Sept 2020 to Mar 2021 (agree/strongly agree)



However, reputations can change quickly when countries are seen to be taking the right action

The United States, which was at the bottom of the pile across all measures in both our surveys in 2020, bucks the trend of entrenched views. In fact, it has had a remarkable change in fortune, and is now chasing Canada and the United Kingdom in terms of being perceived as open and welcoming. The United States is now considered by agents to be more open and welcoming (51% agree/strongly agree) than either Australia (30%) or New Zealand (30%).

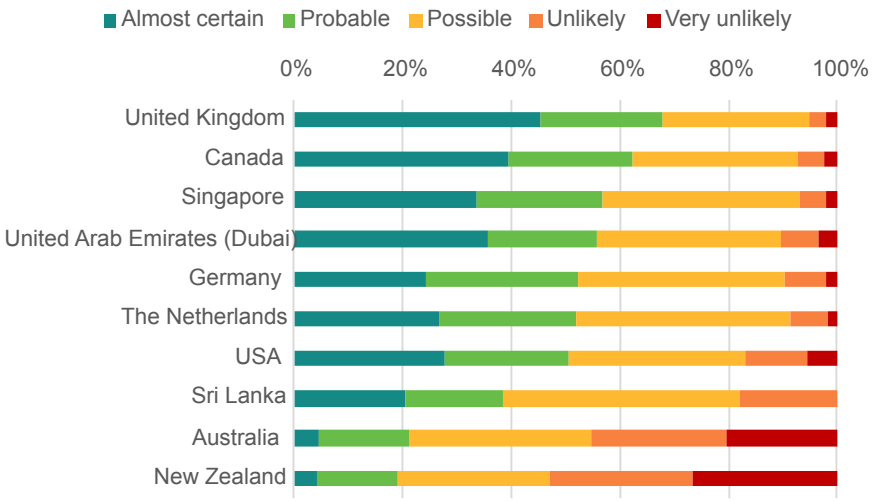
Singapore, which is proving itself to be an exciting emerging market for global education, has also demonstrated how quickly countries can rise to prominence as study destinations in this climate.

Agents are by no means confident about the ability of international students to travel in 2021 and have all but written off Australia and New Zealand

Agents are realistic about the very low likelihood of international students arriving in Australia or New Zealand this year, with just 4% saying they were 'almost certain' that students would be able to travel in the second half of the year.

While Canada and the UK are very well positioned, agents are by no means considering travel to those countries as a sure thing. On our assessment, the UK is looking highly prospective for a full re-opening to international students in the autumn, but even in that case, many agents rate travel as only being possible (27%), unlikely (3%) or very unlikely (2%).

Fig E2: Do you expect students to be able to travel to the following destination countries in the second half of 2021?

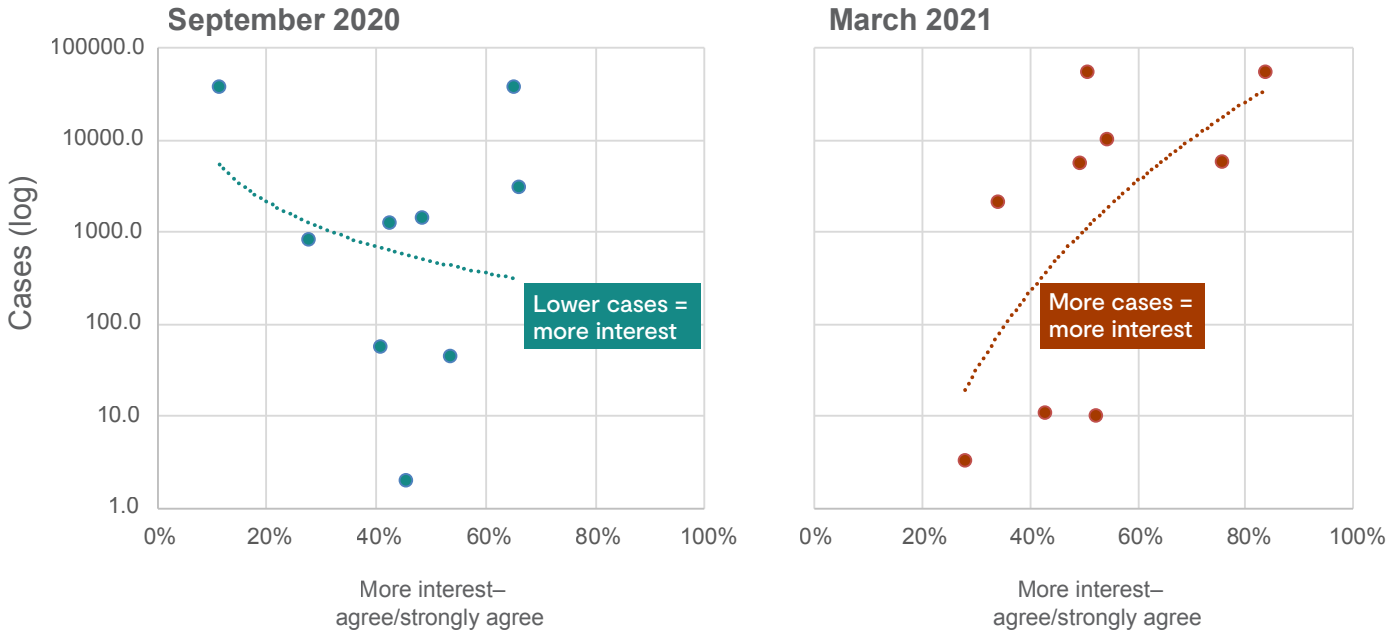


As COVID-19 runs its course, students and agents will pay less and less attention to case counts when judging a country's response and reputation

While Australia and New Zealand continue to be perceived as 'safe and stable' due to their elimination strategies and very low case numbers, this perception is increasingly irrelevant to a country's reputation as a study destination. As the figure below shows, there is a clear decoupling between increasing interest in a given study destination, and the number of cases. While there was a weak relationship between the case counts and survey responses in Sept 2020, this relationship has more or less disappeared altogether in March 2020.

In our most recent survey, we are also seeing countries that are still facing high numbers of COVID-19 cases, particularly Canada, improving their reputation for safety and stability, and increasing the level of interest in their offering as a study destination.

Fig E3: Relationship between confirmed COVID19 cases (7-day rolling average) and proportion of agents that agree/strongly agree that "Over the past two months, there has been more interest in this country as an education destination compared to other countries."



Canada poised for a potential surge in international students in 2021

Canada is currently the most attractive study destination underpinned by a strong government policy response to COVID-19

In the latest Navitas agent research, International education agents have provided a ringing endorsement of the Canadian response to COVID-19 with Canada holding a commanding lead ahead of the start of the 2021 academic year.

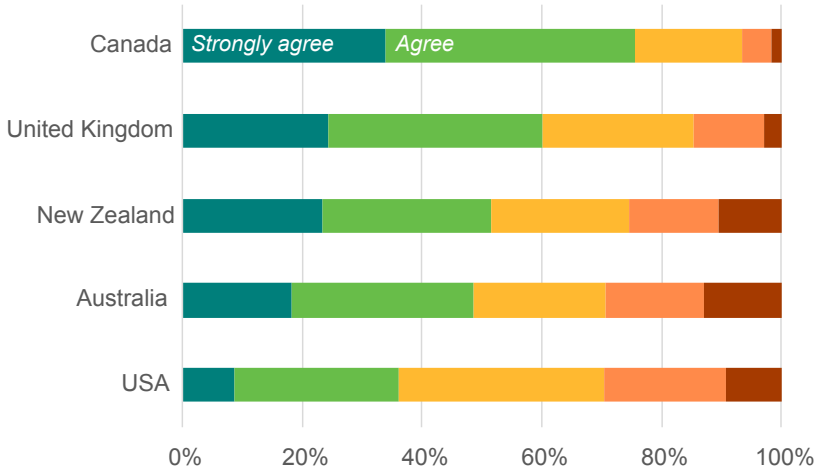
In terms of general sentiment, a substantial 63% of agents rated Canada as "Very Attractive". This is well ahead of the UK and Australia at 51% and 49% respectively.

In terms of the various contributing factors, three-quarters of agents agreed that the Canadian government's handling of the coronavirus had made it a more attractive study destination. From a purely public health point of view, some might consider this to be somewhat of a surprise. While the Canadian government certainly performed better than either the UK or USA in the early months of the pandemic, its vaccination program has faced challenges in recent months.

However, it is much less of a surprise when considering specific measures that have been put in place for international students. In this domain, the government's response has been near faultless. Both its policies and its messaging to international students hit all the right notes. In particular, it allowed existing permit holders to travel into the country after borders were closed, it provided international students with access to the Canada Emergency Response Benefit (CERB), and it communicated openly and positively to international students and their families throughout.

More recently the Canadian government has announced temporary changes to its Post Graduate Work Permits Program (PGWP) to extend eligibility for a PGWP to international students who need to complete their studies online from abroad. After the survey was in the field, the Canadian government issued an invitation for 40,000 graduates to put down roots in Canada – such significant policy measures provide continuous reinforcement for Canada's favourable views towards international students throughout the pandemic, recognising them as valuable contributors to the country's social and economic fabric.

Figure 1.1: Over the past two months, the way this country's government has handled coronavirus has made it a more attractive study destination



THE CANADIAN CONTEXT

International students are a core part of the post-secondary education landscape in Canada.

As recently reported by Statistics Canada, international students accounted for all of the growth in postsecondary enrolments in 2018/19. In many critical fields of study, international students now make up a large proportion of the student body, including one-third of enrolments in Mathematics, Computer and Information Sciences.

Statistics Canada has projected that Canadian universities could possibly lose between $377 million and $3.4 billion (or 7.5% of projected revenues) in 2020/2021, depending on the size of the reduction in international student enrolments and the subsequent loss in tuition fees. These dire forecasts were based primarily on the level of student permit processing in late 2020.

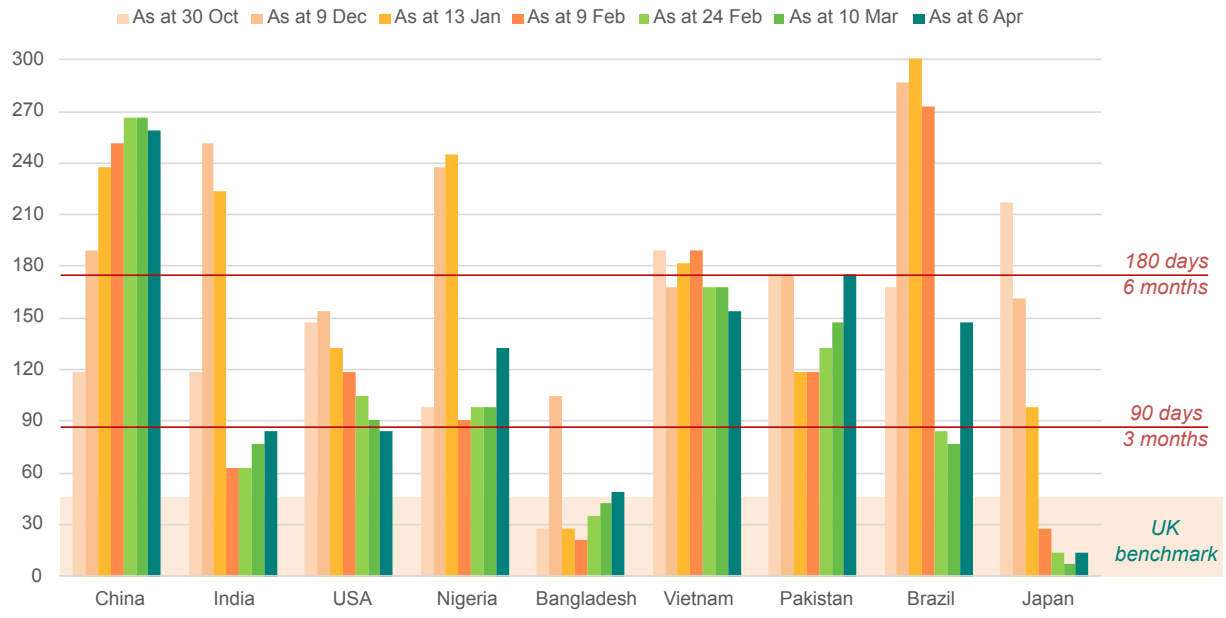
Visa processing is undermining the positive sentiment towards Canada

Visa processing turned out to be the tourniquet on Canada's firehose; demand from international students was strong but lengthy delays to get a visa meant that the number of new students starting in the fall intake for 2020 was much weaker than anticipated. The volume of study permits issued in 2020 was 36 per cent lower than the number issued in 2019. This appears to be a direct result of IRCC having processed 48% fewer study permit applications over the course of the year.

Canada was not alone in seeing a major disruption to visa processing – Australia and the UK both also shutdown visa processing entirely early in 2020. The difference was that both countries were able to reopen, deal with the backlog, and get back to pre-pandemic processing turnaround times. In contrast, Canada is still reporting an estimated wait time of 38 weeks for study permit applicants in China and 21 weeks for applicants in Vietnam.

Visa processing is not the most important part of the international student journey, but it is one of the most daunting. Complex and onerous documentation requirements, lengthy and variable wait times, opaque assessment considerations, and unpredictable results in terms of a visa being granted or rejected – all of these make the process seem highly uncertain for individuals trying to plan for a major life event.

Figure 1.2: Estimated visa processing times according to Canada.ca



Source: https://www.canada.ca/en/immigration-refugees-citizenship/services/application/check-processing-times.html

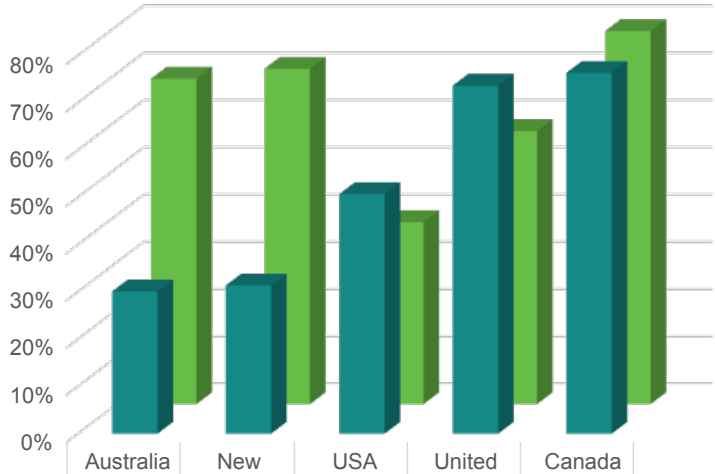
Canada leads the way on both safety and openness

Navitas has been tracking agent sentiments on the twin dimensions of 'safe and stable' and 'open and welcoming' since the start of the pandemic. For the first time, Canada leads on both dimensions.

In 2020, countries either led on being 'safe and stable' (New Zealand, Australia) or on being 'open and welcoming' (the UK). In 2021, Canada has achieved a surprising and commanding position being number one on both safety (79% agree) and openness (76% agree). Of the major anglophone destinations, no other country comes close to achieving this result, with the UK in a distant second place (with 58% and 74% respectively).

As discussed previously, Canada has led the way in its policy response to international students during the pandemic. Canada has continually demonstrated its inclusivity through a range of support measures targeted at international students affected by the virus (including additional work rights and access to unemployment benefits). Its reopening of borders to international students in October last year and subsequent announcements regarding extensions to post-study work rights and vaccines for international students have only strengthened its reputation.

Figure 1.3: Proportion that agree/strongly agree that the reputation of a country as 'safe and stable' and 'open and welcoming' has improved in the last two months



	Australia	New Zealand	USA	United Kingdom	Canada
Open and Welcoming	30%	31%	51%	74%	76%
Safe and Stable	69%	71%	39%	58%	79%

A few obstacles remain in the way of a significant surge in international student commencements in Canada in 2021

The agent survey provides compelling evidence that student interest in Canada remains strong. There is a good chance that many students who could not commence last Fall simply deferred for a year and will be looking to try again in 2021. Similar to the Ontario double cohort of 2003, there is the potential for Canada to see a significant surge in international student applications in 2021. The potential to overshoot pre-pandemic demand would be driven by those students who deferred from last year, and possibly some displaced students unable to fulfil their plans to study in Australia and New Zealand.

However, Canada's window of opportunity to realise such a surge is closing fast. Unlike other exports, international education is very much time sensitive with the vast majority of post-secondary students commencing their programs in the Fall. Unlike Australia which has two entry points into the academic calendar in February and June, everything hinges on September in Canada. And September is less than six months away.

Most international students will need at least 3 to 6 months to make their necessary plans. There are three reasons why Canada may miss this window of opportunity.

First, the vaccine rollout has improved but may not progress quickly enough for the public health officials and politicians to adopt an open borders stance in the next few months. From a public health perspective, Canada is doing well, but the timing of borders being re-opened is uncertain. By contrast, the UK has explicitly committed to a roadmap that includes removing all social distancing requirements by 21 July – the resumption of international travel is also on the cards.

Second, visa processing times seem to indicate that Canada is not yet able to cope with the volumes of applications coming through, which will be exacerbated if the surge from pent-up demand does come. Until a study permit is granted, international students will remain prudently uncommitted, and continue to hedge their bets with applications to other prospective destinations.

Third, there will be long queues around flights and mandatory quarantine. Closed borders, partial or otherwise, will continue to limit the air travel options for students that want to study in Canada in the Fall. Mandatory quarantine will similarly create a bottleneck for student arrivals. It is important to consider that there is already a queue of students who had either commenced their studies pre-pandemic or commenced with online study in the last 12 months waiting to enter the country.

If Canada doesn't have all its ducks in a row in time for the September 2021 intake, some students may be committed enough to contemplate a start online before transitioning to face to face. But many students could also consider other study destinations, particularly the United Kingdom.

The UK remains well-positioned to build market share in 2021

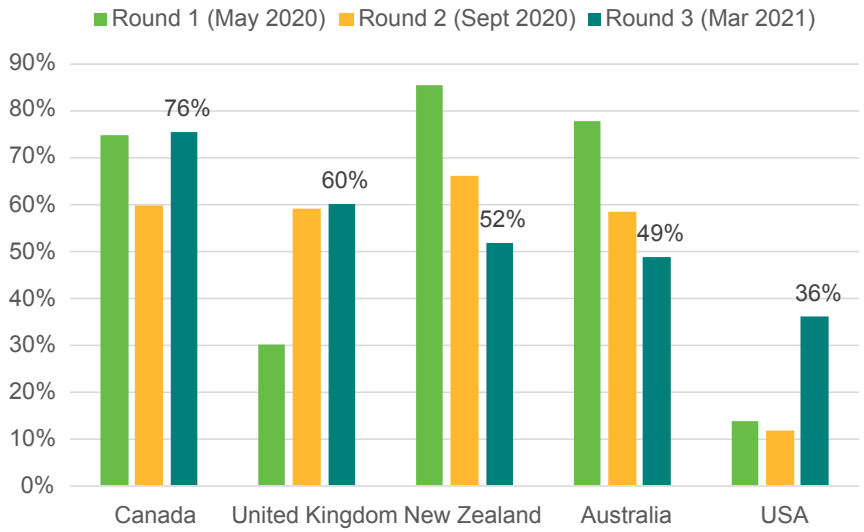
The UK continues to maintain a strong position as a leading destination for international students in the midst of a global pandemic

In the latest Navitas agent survey the UK maintains a strong position amongst all anglophone destinations for international students.

Against the odds, the UK was the surprise strongest performer in 2020. Despite its early mishandling of the pandemic, (1) positive policies, (2) a shifting student focus from health and safety to openness and accessibility, and (3) a degree of good timing and good fortune allowed the UK to capitalise on its pre-pandemic momentum. It closed out the year with new student visas granted down just 18% for the 2020 calendar year (Home Office data).

The most dramatic improvement over the last three surveys has been the agents' rating of the UK government's handling of the pandemic. The UK's rating rose from 30% in May 2020, to almost 60% in September 2020, to 60% in March 2021. As Figure 2.1 shows, this is a remarkable achievement given agents' views on most other destinations have moderated as the months have worn on.

Figure 2.1: Over the past two months, the way this country's government has handled coronavirus has made it a more attractive study destination – change over time



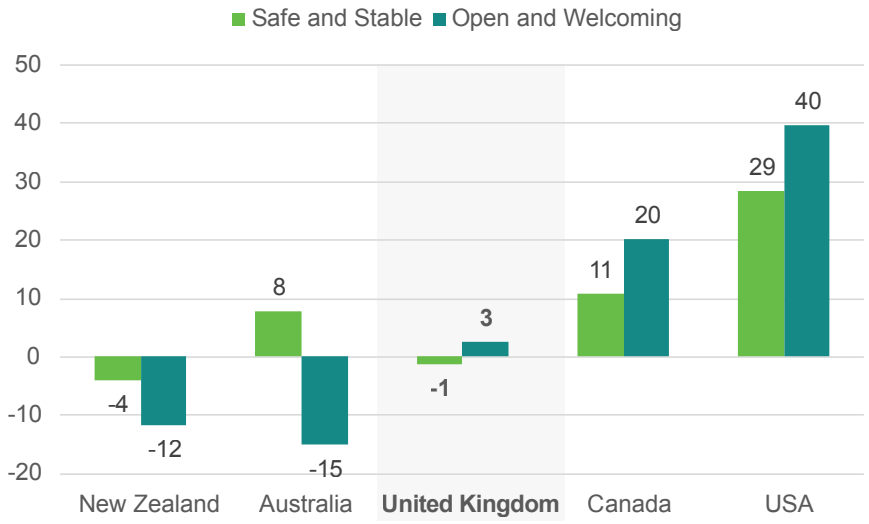
The UK is no longer the sole leader in terms of being open and welcoming, and there is still room for improvement in terms of being safe and stable

Navitas has been tracking agent sentiments on the twin dimensions of 'safe and stable' and 'open and welcoming' since the start of the pandemic.

In the September 2020 agent survey, the UK was notable for being the destination with the reputation for being the most open and welcoming (71% agreement). At 74% agreement in the March 2021 survey, the UK has continued to improve in this regard (improving 3 points), but Canada has now jumped 20 points to edge ahead at 76%.

On the dimension of being 'safe and stable', the UK continues to exhibit room for improvement at 58% agreement, lagging some distance behind Canada, New Zealand and Australia (79%, 71%, and 69% agreement respectively). It is somewhat puzzling that the UK government's swift and effective roll-out of the COVID-19 vaccination programme has not had a more substantial effect. At the time of writing, more than 32 million doses had been delivered, with progress on track to vaccinate all over 18s with the first dose by the end of July. As with Canada, all international students have also been included in the vaccination timetable.

Figure 2.2: Proportion that agree/strongly agree that the reputation of a country as 'safe and stable' and 'open and welcoming' has improved in the last two months – Change between Sept 2020 and March 2021 (percentage points)



"It's interesting to see that Canada is now ahead of the UK as being more 'open & welcoming' given that the UK government has continued to highlight its commitment to international students through it's positive immigration policy. As a sector we are already reaping the benefits of the government's approach and there is certainly an exciting momentum behind international education in this country, which is starting to play out in applications and enrolments."

— Paul Lovegrove, Chief Executive Officer, University Partnerships Europe & Chief Operating Officer Navitas Global

Optimism regarding the ability to travel to the UK remains its strongest feature

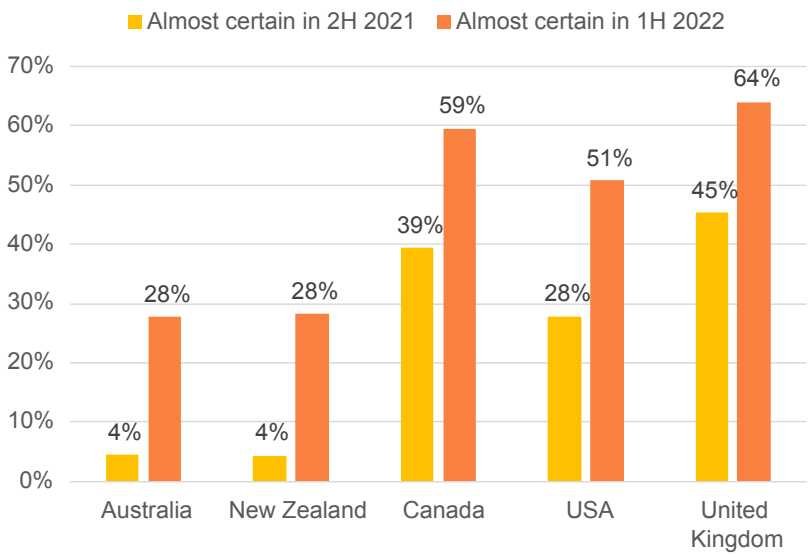
In 2020, agents were asked to rate the likelihood that students would be able to travel to specific destinations in the first half of 2021, ranging from 'almost certain' to 'very unlikely'. At the time, the UK was perceived to be the most accessible education destination, with almost half of respondents believing with near certainty that students would be able to travel to the UK in the first half of 2021 (47% almost certain). A much smaller proportion considered it to be 'almost certain' that students would be able to travel to Canada (30%), Australia (24%), New Zealand (20%) and the US (6%).

As of March 2021, agents continue to show strong optimism about the ability to travel to the UK in the coming 12 months; 45% per cent were 'almost certain' that international students would be able to travel to the UK in the second half of this year, and 64% in the first half of 2022. The fact that the UK leads all other destinations on these measures is a significant advantage given that various other reports are indicating a strong willingness amongst students to switch destinations in order to travel and commence studying face-to-face (QS).

Such switching behaviour is likely to come at the expense of Australia and New Zealand where — at less than 5% almost certain — the prospects for travel in the second half of 2021 are appropriately pessimistic in the eyes of agents.

The commencement of the long-awaited Graduate Route in Summer 2021 will provide a timely reminder of the opportunities afforded to international students to work and live in the UK.

Figure 2.3: Do you expect students to be able to travel to the following destination countries in the second half of 2021/first half of 2022?



Remarkable shift in perceptions of USA indicates that reputational recovery is well underway

The USA was always the number one destination, and will reassert its status in the coming year

Throughout 2020, agents were reporting — through the Navitas agent survey — record low levels of sentiment and enthusiasm for the USA as a study destination. On almost every measure, USA languished behind the UK, Canada, Australia and New Zealand.

This is consistent with the USA's weak performance in international student recruitment statistics over the last few years. More importantly, it reflects an accumulation of negative sentiment tied to a wide variety of political and social factors, which culminated with the storming of the Capitol early in the new year.

President Biden campaigned on a progressive immigration agenda and on his first day in office, issued a number of executive orders to revoke actions imposed by the previous administration. These included halting construction of the Mexican border wall and ending the ban restricting travel from 14 countries (commonly known as "the Muslim ban"). He also sent a bill to Congress aimed at reforming the country's immigration system. More recently, Biden let a ban expire on H1B visas, yet another signal to the world that international students are welcome in the US. An improvement in the USA's reputation for being a tolerant and welcoming multicultural society has been widely anticipated, and the latest Navitas agent survey shows that this change is well underway.

At the current dramatic rate of progress, the USA looks poised to reassert its position as the number one study destination for international students globally.

In the eyes of agents, the US government's handling of the coronavirus has rapidly improved but it is yet to close the gap

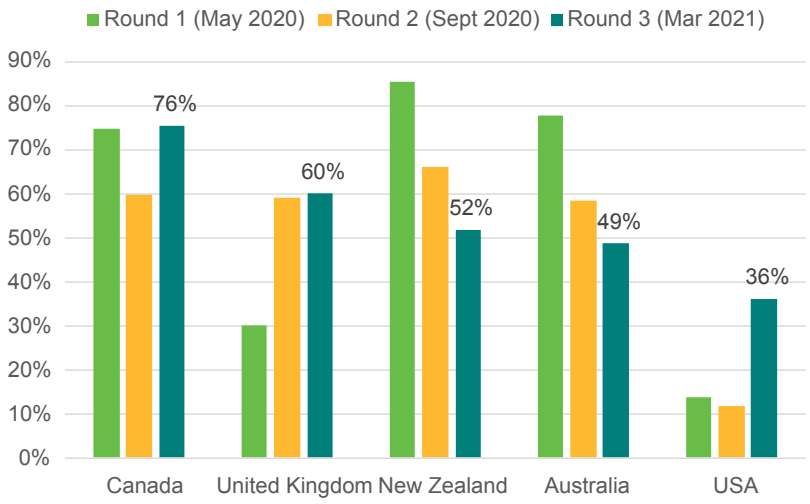
Throughout 2020, the Navitas agent survey showed that the USA's reputation for managing COVID-19 was marked by strong negative sentiment with two-thirds of respondents in the September 2020 survey disagreeing or strongly disagreeing that it had become a more attractive destination as a result. September 2020 was arguably a low point for the USA as it approached the presidential election with no clear path to victory for either Trump or Biden at the time.

As Figure 3.1 shows, negative sentiment has dramatically fallen away. Negative sentiment towards the government's handling of the coronavirus in the USA is now on par with that of Australia, which has been able to secure a dramatically different outcome with negligible cases.

Positive sentiment towards the government's handling of COVID-19 has also improved dramatically from barely 12% agree or strongly agree in September 2020, tripling to over 36% agree or strongly agree in March 2021.

There are two key factors that are likely to be underpinning this dramatic improvement in reputation. First is the monumental vaccination program, which commenced in the dying months of the Trump administration and accelerated under Biden's commitment to deliver 100 million doses within his first 100 days. The target was met within 58 days and the Biden administration has since pledged to hit an updated target, which was doubled to 200 million. Second, the Biden administration has adopted a more conventional science-led response to the pandemic, and the adoption of more conventional policies has delivered greater predictability and normalcy in the COVID-19 response.

Figure 3.1: Over the past two months, the way this country's government has handled coronavirus has made it a more attractive study destination – change over time



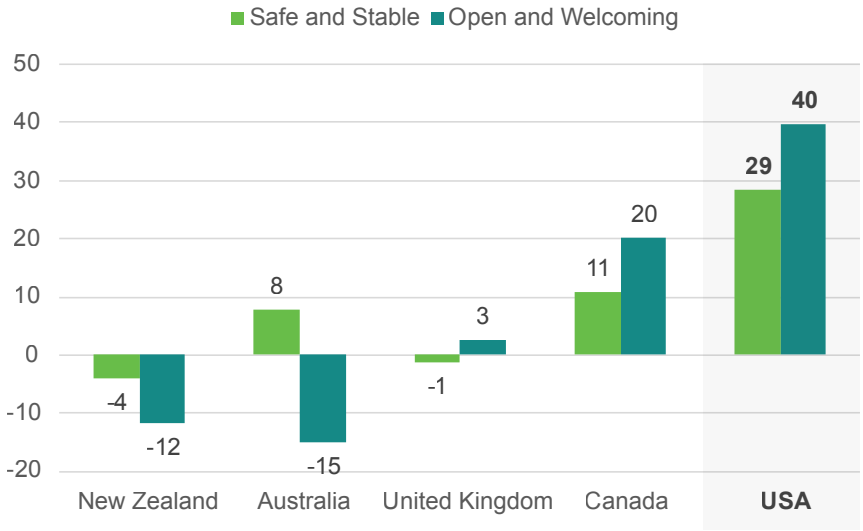
The USA's reputation for being both 'safe and stable' and 'open and welcoming' has surged

Previous Navitas surveys also showed the USA lagging dismally behind other countries on the measures of being reputedly 'safe and stable' and 'open and welcoming'. On these twin measures, the USA has also seen a dramatic surge.

The proportion of agents reporting improvement in the reputation of the USA as safe and stable almost quadrupled from 10% to 39% between September and March. Even more impressive is the USA's reputation for being open and welcoming which saw an almost five-fold increase from 11% in September to 51% in March.

As a result, agents are now reporting that the USA is in fact considered to be more open and welcoming than either Australia or New Zealand. This is also reflected in agents' much more optimistic assessments of the likelihood of students being able to travel to the USA in either the second half of 2021 or the first half of 2022 (28% and 51% almost certain respectively).

Figure 3.2: Proportion that agree/strongly agree that the reputation of a country as 'safe and stable' and 'open and welcoming' has improved in the last two months – Change between Sept 2020 and March 2021 (percentage points)



In reality, this improvement in reputation among education agents is not likely to translate into earnest recovery of the sector in the USA until September 2022. It will take time for the Biden administration to implement its new policies and for the visa issuance process, which is already experiencing delays due to the COVID-19 pandemic, to catch up with the increased demand for visas.

COVID-19 has accelerated the rise of Singapore as an international education destination

Singapore's appeal is underpinned by a myriad of factors

Singapore has long been seen as a contender destination for international study, with the potential to rival the five major anglophone countries. There are a myriad of factors that underpin the island nation's appeal.

Singapore offers widespread courses with English-medium instruction (EMI) given that English is in fact the de facto lingua franca and main language. It punches above its weight with more than its fair share of highly-ranked domestic and foreign universities. It is geographically central and thoroughly multicultural, multi-ethnic and multi-faith.

Singapore is of course a highly-successful, knowledge-based economy with decades of stable government since independence. All of these factors contribute to an enviable thriving, cosmopolitan environment bundled in a safe, accessible and compact footprint.

It is for good reason Singapore is ranked 20th in the QS Best Student Cities 2019, flanked by New York and Barcelona no less.

Singapore ranked third for handling of COVID-19, fourth for safety and stability, and third for openness

The Navitas survey of agents included questions pertaining to the ten countries within which Navitas operates university partnerships. In addition to the primary anglophone destinations, agents were also asked to provide responses for Singapore, Germany, the Netherlands, UAE and Sri Lanka. Agents were only asked to comment on any countries about which they were sufficiently well-informed.

Although many more agents were able to comment on the likes of Australia and the UK (747 and 687 respondents respectively), the scale of the March 2021 Navitas agent survey provided substantial numbers for destinations like Singapore (274 respondents).

Figure 4.1 shows the relative rankings of the 10 destinations included in the Navitas agent survey on the three key dimensions of the government's handling of the pandemic, the country's reputation for being safe and stable, and the country's reputation for being open and welcoming. The table shows that Singapore performed admirably, third for the handling of COVID-19, fourth for safety and stability, and third for openness.

Figure 4.1: Rankings for handling of COVID-19, safe and stable, and open and welcoming

	Government's handling of COVID-19		Reputation for being safe and stable		Reputation for being open and welcoming
1	Canada	1	Canada	1	Canada
2	United Kingdom	2	New Zealand	2	United Kingdom
3	Singapore	3	Australia	3	Singapore
4	New Zealand	4	Singapore	4	USA
5	Australia	5	United Kingdom	5	Germany
6	United Arab Emirates	6	Germany	6	United Arab Emirates
7	Germany	7	The Netherlands	7	The Netherlands
8	The Netherlands	8	United Arab Emirates	8	New Zealand
9	USA	9	USA	9	Australia

COVID-19 has led to more interest in Singapore as an education destination

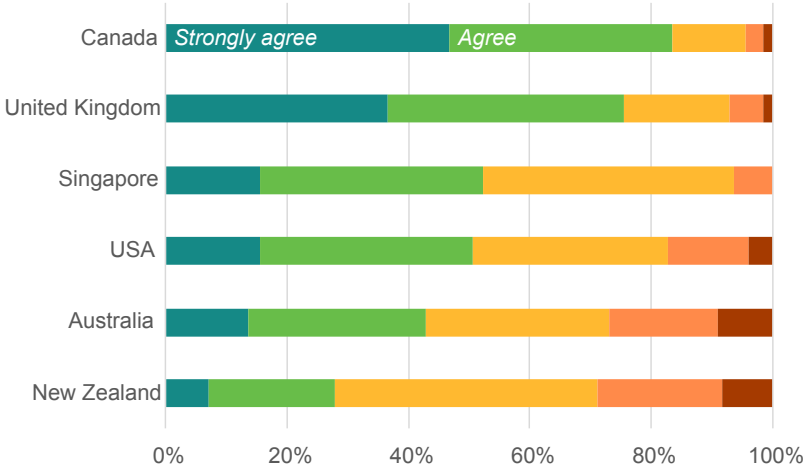
One of the concluding questions in the Navitas agent survey assesses changes in the level of interest in different destinations . The proportion that agree/strongly agree that there has been increased interest in Singapore as an education destination has grown from 41% in September 2020 to 52% in March 2021.

The increasing interest in Singapore is comparable to that of USA (51%), Germany (54%) and Netherlands (49%), and is better than Australia (43%).

Whether or not the current interest in Singapore will be sustained remains to be seen. Interest is particularly strong from China and South East Asia, and less so from South Asia.

In some ways, Singapore's strong performance during COVID-19 has not been unexpected. As a destination with many branch campuses — for example, the Curtin Singapore campus operated by Navitas — it provides a valuable transitionary option and viable alternative for students intent on studying in places like Australia and New Zealand while those borders remain close. The big question is whether this COVID-inspired uptick in demand will translate to a longer-term shift in international student preferences towards the Lion City.

Figure 4.2: Proportion that agree/strongly agree that there has been more interest in this country as an education destination in the last two months – March 2021



"Singapore has in some ways been here before. Between 2009 and 2011 when Australia temporarily fell out of favour as an international study destination, enrolments in Singapore grew from trimester to trimester. That growth spike burnt brightly and quickly and was not sustained when Australia recovered. The pandemic will pass but perhaps a return to political normalcy will take longer which might give Singapore time to strengthen its foothold.'

— Yu-Gin Teo, College Director and Principal of Curtin Singapore.

Australia and New Zealand will be spectators, not beneficiaries, of a recovery in global student flows in 2021

Australia and New Zealand are characterised by their hard border stance with no end in sight

It is clear that Australia and New Zealand continue to maintain a hard stance against international arrivals. Politicians and the community in both countries remain sensitive to any cases of community transmission of the disease.

In a recent address by the Australian Minister for Education, it was made clear that with the COVID-19 vaccine being rolled out, the Australian government is "increasingly hopeful that student arrivals in larger numbers will occur by Semester 1 of next year."

In considering proposals for the return of international students, the New Zealand Education Minister has said that, "The reality is it's just not possible to do that without significantly increasing the risk." Like his Australian counterpart, his message for the sector is "2022's looking better than 2021."

As the following figure shows, a fulsome border re-opening and resumption of international student flows are contingent on a number of key factors.

In the case of Canada, the vaccine rollout has faced various supply-side obstacles but is already starting to pick up pace. As outlined above there are a number of issues that remain around visa processing and quarantine confusion, but there is still a realistic window of opportunity for Canada to get its ducks in a row in time for a possible recovery in the fall of 2021. The demand is certainly there.

Notwithstanding its early mishandling of COVID and its severe second wave, the UK's rapid vaccine roll-out, recent track record for visa processing, and mostly open borders throughout 2020 makes a 2021 recovery very likely.

Figure 5.1: Assessment of reopening timelines for UK, Canada, Australia and New Zealand

	UK		Canada		Australia		New Zealand	
Return to 'normal' requirements	H2 2021	H1 2022	H2 2021	H1 2022	H2 2021	H1 2022	H2 2021	H1 2022
The vaccine roll out completed	🟢		🟢		🟠	🟢	🟠	🟢
Borders re-opened	🟢		🟢		🔴	🟢	🔴	🟠
Flights available	🟢		🟠	🟢	🔴	🟠	🔴	🟠
Quarantine no longer required	🟢		🟠	🟢	🔴	🟠	🔴	🟠
Visas available	🟢		🟠	🟢	🟠	🟢	🔴	🟠
F2F teaching resumed	🟢		🟢		🟢		🟢	
Economy in recovery	🟢		🟢		🟢		🟢	
Pre-COVID19 momentum	🟢				🟠		🔴	
Anticipated return to 'normal'	**H2 2021**		**H1 2022**		**H2 2022**		**H2 2022**	

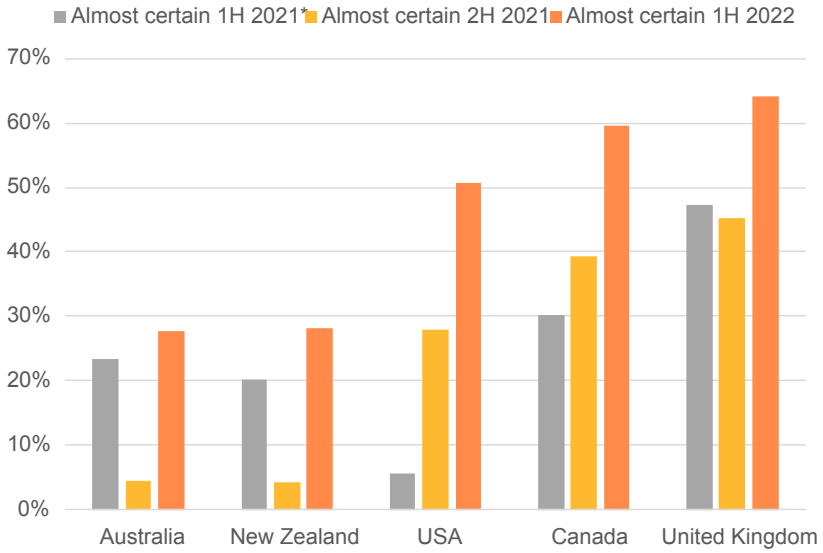
Agents now see little prospect for travel to Australia and New Zealand in 2021, and are reticent about prospects for early 2022

Agents have all but written off the southern hemisphere's academic year. In response to the question, "Do you expect students to be able to travel to the following destination countries in the second half of 2021?" respondents to the Navitas agent survey are pessimistic. Just 4% consider it almost certain that travel to either Australia or New Zealand will be possible in the second half of 2021.

In contrast, ten times as many agents would consider it almost certain that students would be able to travel to Canada (39%) or the UK (45%). Our research indicates that the start of the northern hemisphere's academic year in August/September 2020 will be very strong.

As for the first half of 2022, 28% of agents believe travel to either Australia or New Zealand will be 'almost certain' – much more prospective than 2021, but much less likely than the UK (64%) or Canada (59%).

Figure 5.2: Do you expect students to be able to travel to the following destination countries in the second half of 2021/first half of 2022?



In the race to recruit international students in 2021, there are leaders, contenders and laggards – with Australia and New Zealand firmly in the latter category

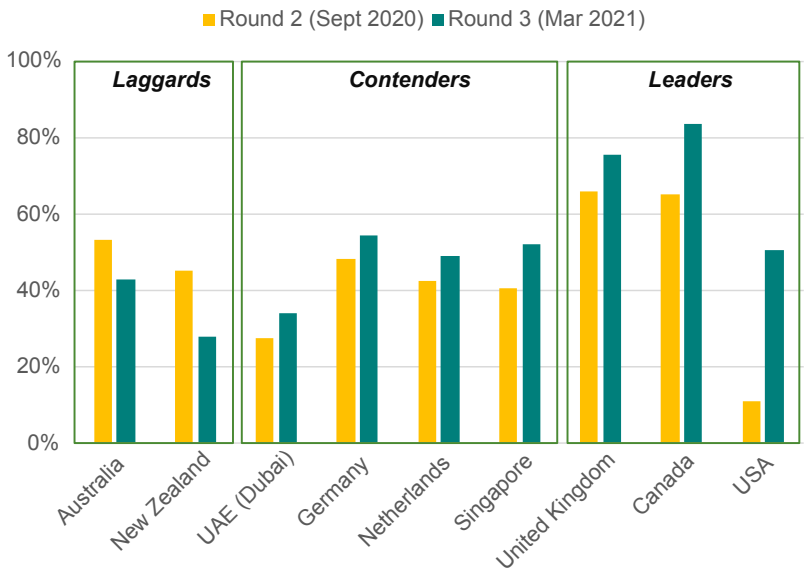
When asked whether there has been more interest in particular countries compared to other countries in the last two months, the responses from almost 900 agents provide a clear delineation between three distinct categories.

First, the UK, Canada and the USA represent the market leaders. Agents were reporting increased interest in these study destinations in September 2020, and have reported even more interest in March 2021, with the USA being notable for the very large jump between recent surveys. Agents are now reporting more interest in the USA than in either Australia or New Zealand.

Second, the market contenders are represented by UAE, Germany, Netherlands and Singapore. These destinations are also now showing increasing interest outpacing Australia and New Zealand.

Third, Australia and New Zealand are the clear laggards. Not only is the level of interest being reported lower than other study destinations, but these are the only two countries that have shown a decline on this indicator since the September survey.

Figure 5.3: "Over the past two months, there has been more interest in this country as an education destination compared to other countries." Agree/strongly agree



Many industries are looking forward to a strong recovery in 2021, especially as billions of doses of vaccines are deployed to protect the most vulnerable populations around the world. The international education sector could very well form part of the economic recovery. At this stage it looks likely that whatever rebound in global student flows might eventuate in the coming months, Australia and New Zealand will be spectators and not beneficiaries.

Look out for the second part of this report from our most recent agent survey, which considers regional perspectives on study destinations and anticipated recovery in student mobility.

About The Author
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Jon Chew is the Head of Strategic Insights and Analytics at Navitas, and is one of Australia's foremost experts in international education market trends. The key theme throughout Jon's work has been the interrogation and interpretation of diverse quantitative and qualitative data to uncover the underlying narrative and meaning. His ultimate goal is to influence critical decisions through clear, rigorous and actionable insights. Jon's approach is characterised by deep technical expertise, storytelling, and a genuinely collaborative approach. Jon is passionate about education and is himself a product of global mobility having grown up in Malaysia and making the transition to university many years ago via a pathway program.

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