



# Navitas Agent Perception Survey (NAPS)

*Round 7 - May 2023*



Dear partners,

**I am pleased to share this preview report of our latest Agent Perception Survey with you. These results are the summary of findings from almost 1000 agents – one of our largest responses since we began these surveys in 2020.**

Around the world in 2023, international students are contending with a series of macro-economic challenges in their host countries and home nations. Although we have put the worst of the global pandemic in the rearview mirror, factors such as the high cost of living, geopolitical uncertainty, access to suitable accommodation and employment opportunities are now front and centre when students sit down to consider their pathway to education. These pressures can dictate where and what to study, as well as impact student wellbeing and academic performance.

For Navitas, to be able to understand these challenges in our major education destinations through an agent lens is critical. The responses to the latest round of the Navitas Perceptions Survey have provided an excellent body of information for our dedicated Insights team to unpack. Our findings will be used to engage with media, industry bodies, universities, and governments to advocate for positive change.

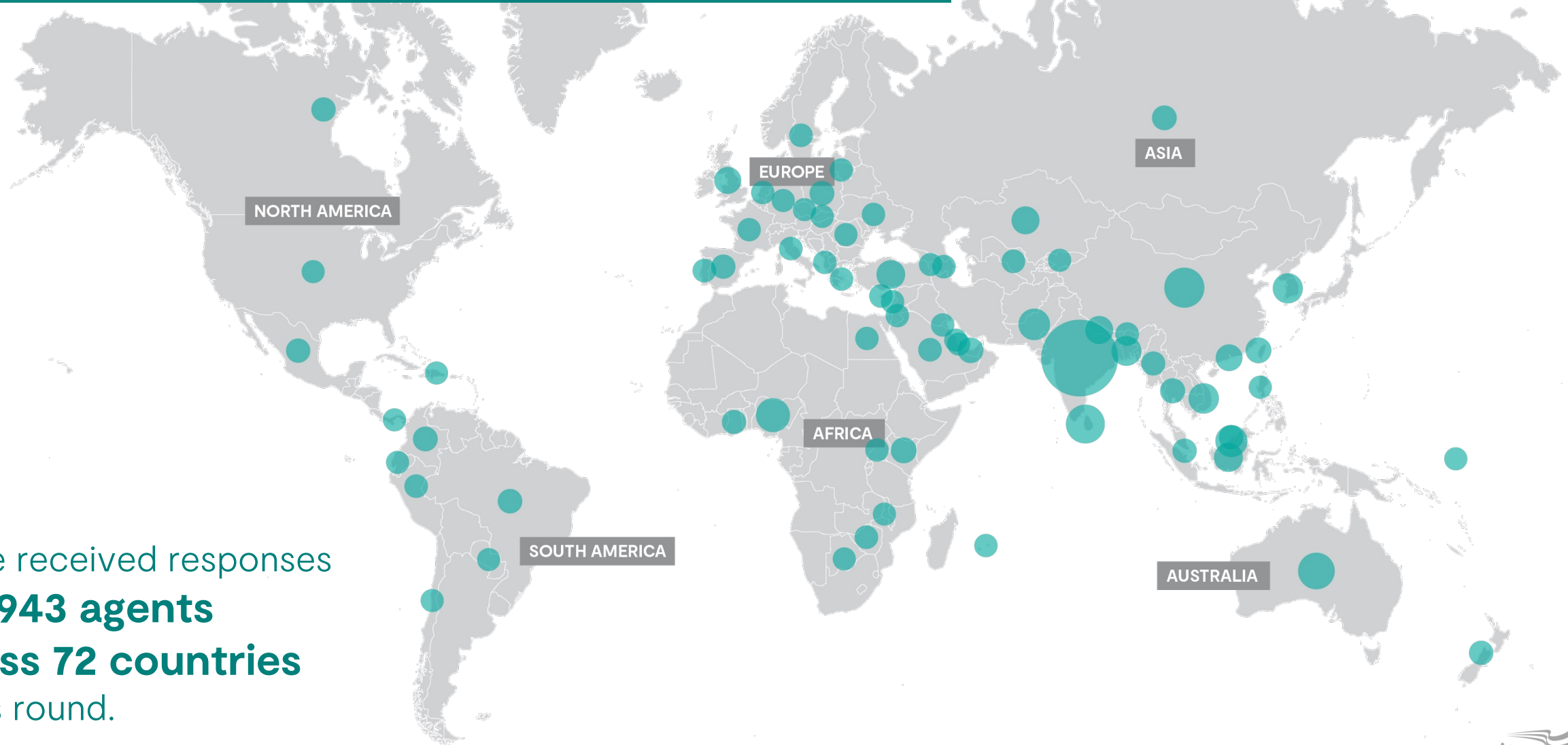
More in-depth analysis and commentary will be available on the Navitas Insights platform soon.

I look forward to our continued collaboration.

Warm regards,  
Scott Jones



We conducted the first Agent Perception survey at the beginning of the pandemic (May 2020) and are now at Round 7.



We've received responses from **943 agents** across **72 countries** in this round.

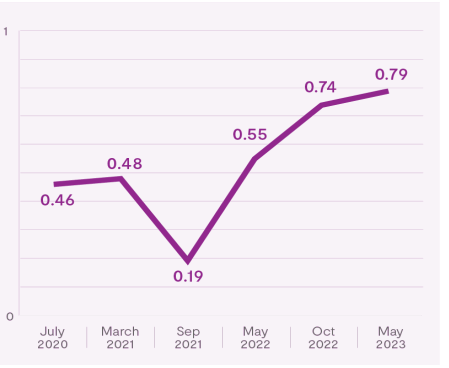
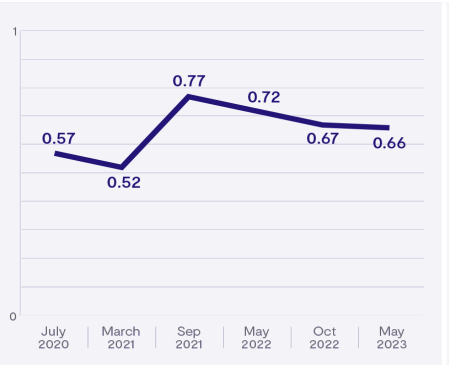
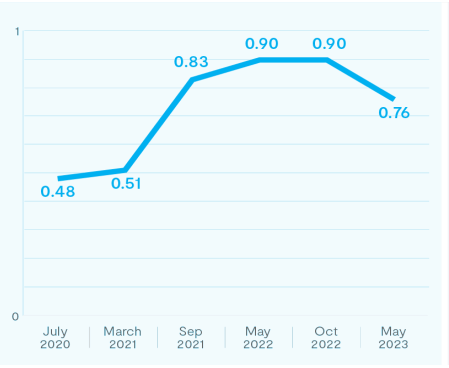
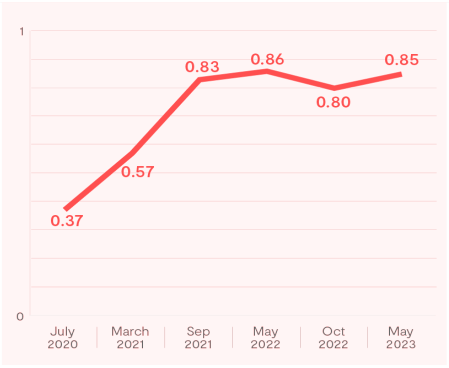
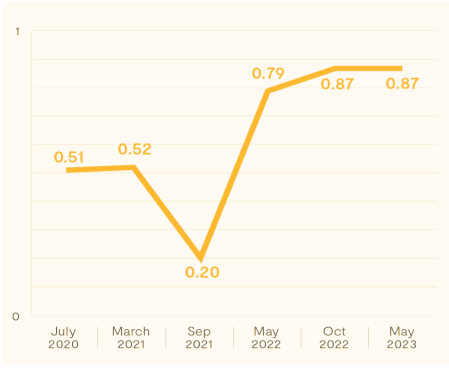
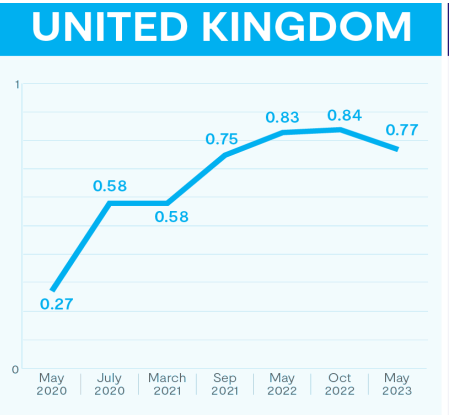
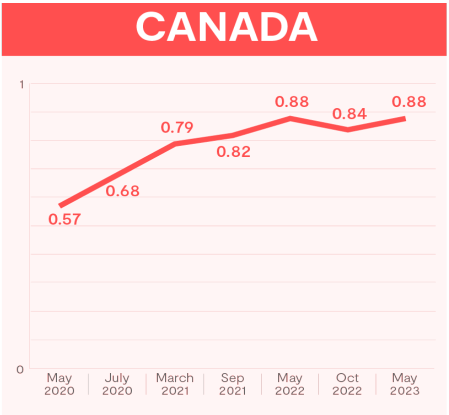
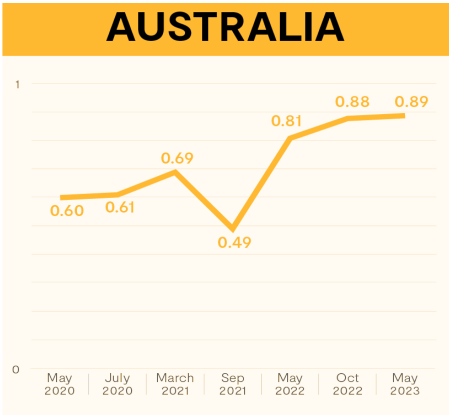
# We have been tracking perceptions about key destinations since May 2020

“Over the past two months, the reputation of this country as **safe and stable** for international students has improved”

% Responses "Strongly agree" and "Agree"

“Over the past two months, the reputation of this country as **open and welcoming** to international students has improved”

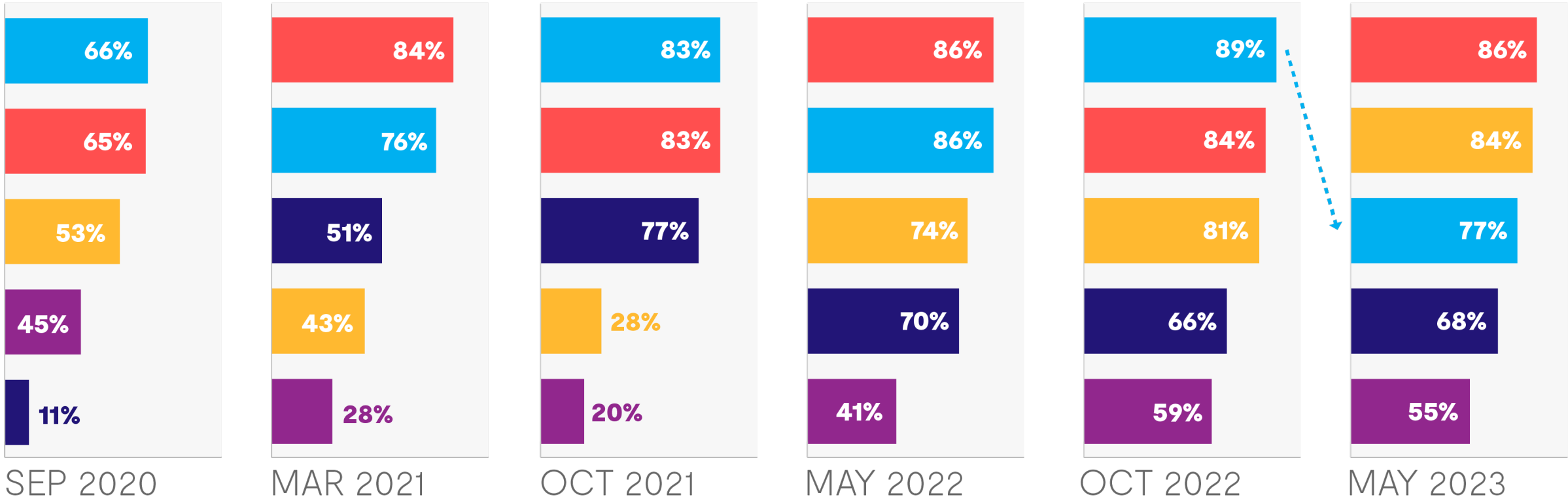
% Responses "Strongly agree" and "Agree"



# UK in focus: The UK government rhetoric shifted after October 2022, signalling a less welcoming stance. Our most recent survey round shows the UK slipping in terms of recent student interest.

"Over the past two months, there has been more interest in this country as an education destination compared to other countries."

% Responses "Strongly agree" and "Agree"



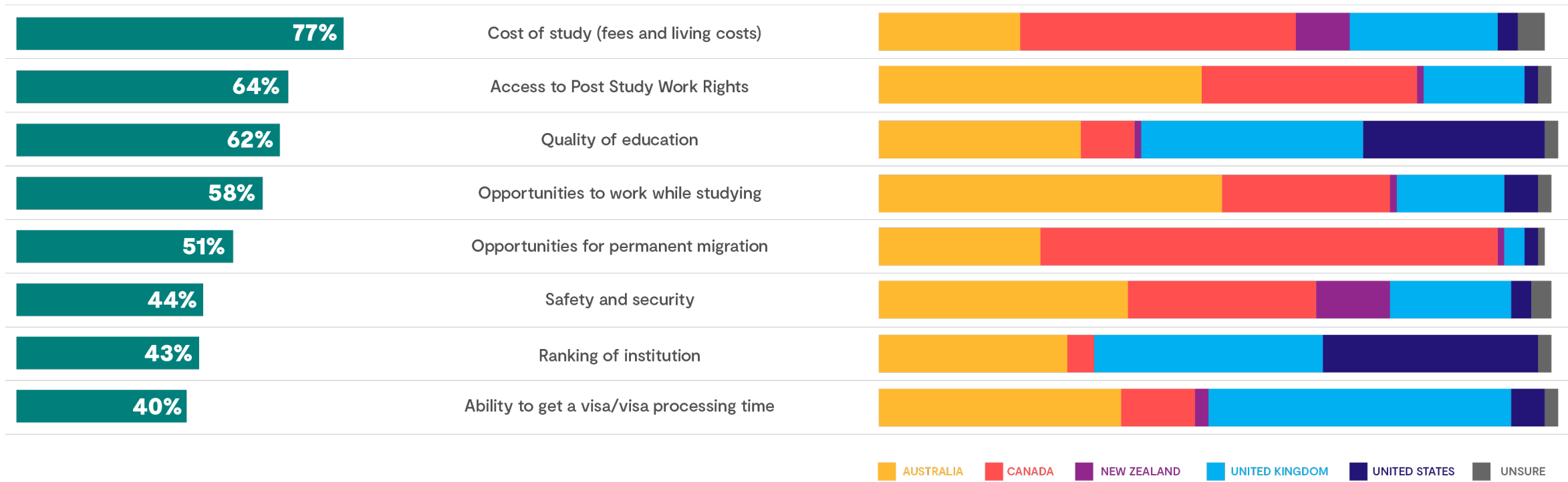
# Cost of study and access to post-study rights are the two most cited factors of influence in this latest survey.

Each of the major destination countries is uniquely positioned across the top factors.

May 2023

Q: What are currently the most important factors influencing student choice of study destination? Top 8 factors

Q: For each of the factors you selected in the previous question, which is the most appealing destination?



# You can see that each region has its own unique set of top priorities

Number of responses

## Greater China

Ranking of institution	67
Cost of study (fees and living costs)	64
Safety and security	58
Quality of education	55
Opportunities for permanent migration	41

## South Asia

Access to Post Study Work Rights	249
Cost of study (fees and living costs)	248
Opportunities to work while studying	228
Quality of education	211
Opportunities for permanent migration	184

## South East Asia

Cost of study (fees and living costs)	110
Access to Post Study Work Rights	88
Quality of education	79
Opportunities to work while studying	77
Safety and security	66
Opportunities for permanent migration	184

## Central Asia

Cost of study (fees and living costs)	29
Ranking of institution	24
Access to Post Study Work Rights	21
Quality of education	21
Safety and security	19

## ANZ

Cost of study (fees and living costs)	39
Opportunities to work while studying	35
Quality of education	32
Access to Post Study Work Rights	31
Opportunities for permanent migration	31

## MENA

Access to Post Study Work Rights	14
Cost of study (fees and living costs)	14
Quality of education	10
Safety and security	10
Opportunities to work while studying	9
Ability to get a visa/ visa processing time	9
Opportunities for permanent migration	9

## Sub-Saharan Africa

Access to Post Study Work Rights	49
Ability to get a visa/ visa processing time	47
Cost of study (fees and living costs)	46
Opportunities to work while studying	41
Quality of education	37

## Europe

Cost of study (fees and living costs)	65
Quality of education	54
Ranking of institution	45
Opportunities to work while studying	45
Access to Post Study Work Rights	37

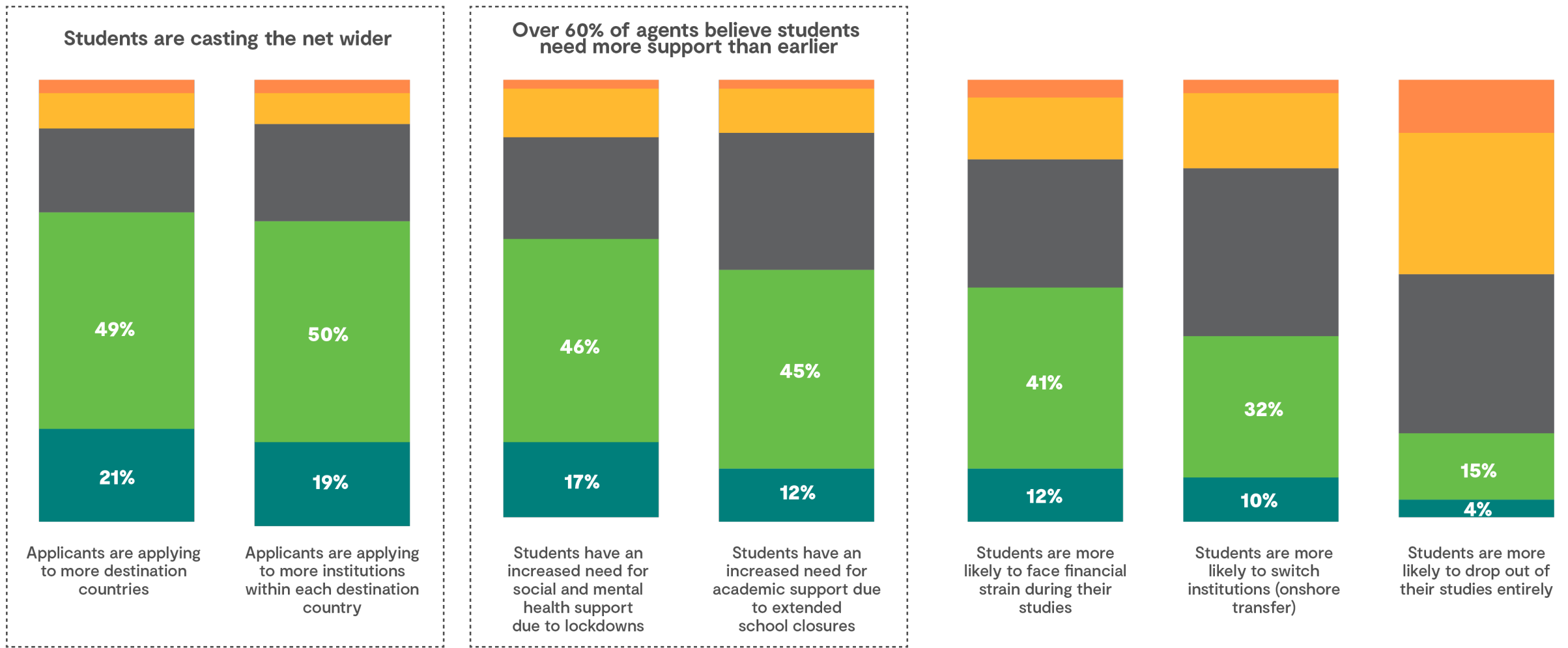
## Americas

Cost of study (fees and living costs)	29
Opportunities to work while studying	27
Opportunities for permanent migration	22
Access to Post Study Work Rights	19
Quality of education	18

# Post-COVID, students are casting the net wider: 70% of agents believe students post-COVID are applying to more destinations as well as more institutions within each destination

Please indicate to what extent you would agree to the following statements regarding changes in student needs and choices before and after COVID.

% Respondents by Response



Strongly Disagree Disagree Neither agree nor disagree Agree Strongly Agree

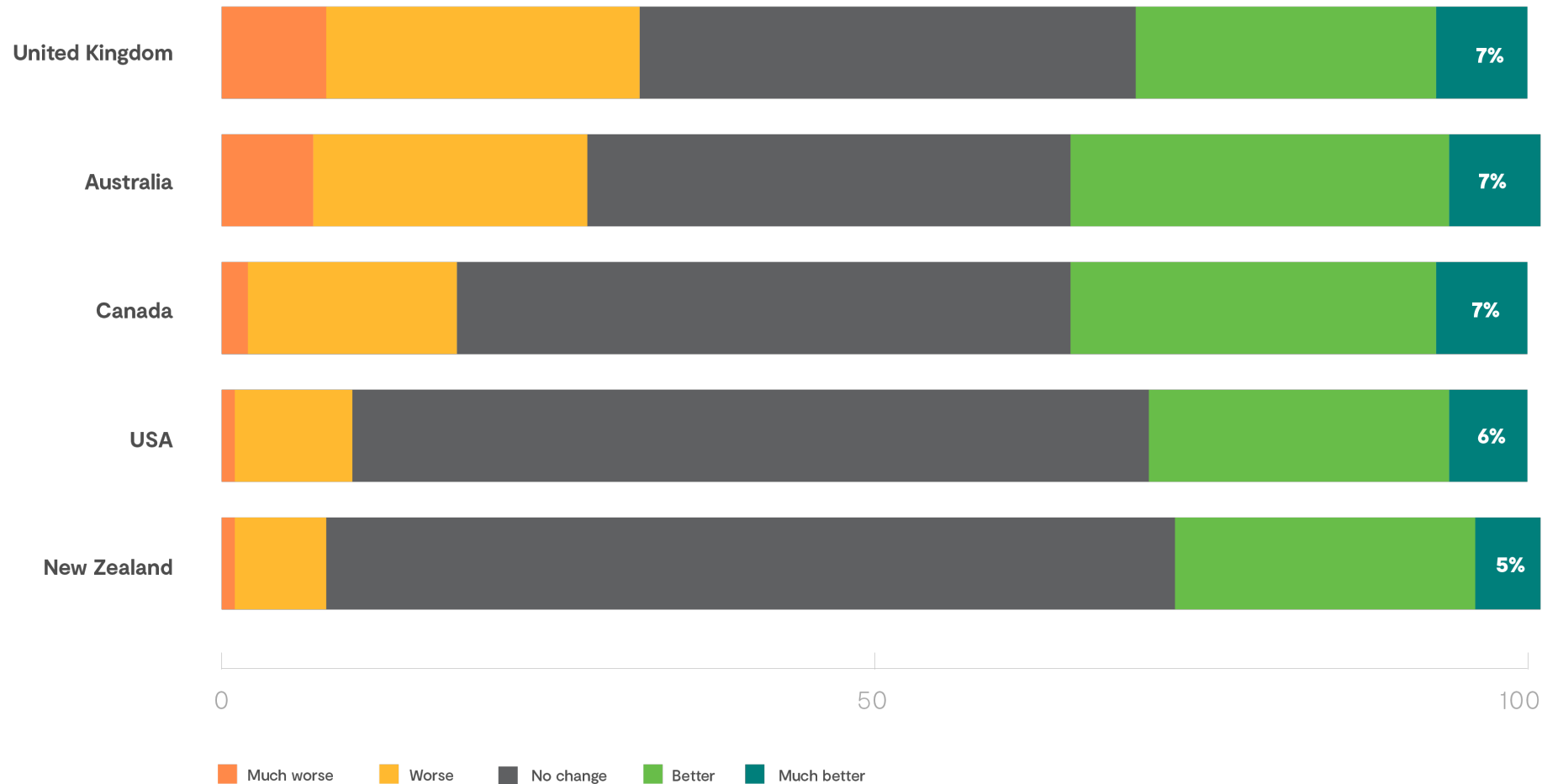


## Accommodation availability: Changes over the past 6 months

The UK and Australia appear to have the most challenges linked to accommodation availability. However, for all destinations, between 20–30% of agents believe the situation has improved

How has the availability of suitable accommodation changed over the past 6 months, by destination country?

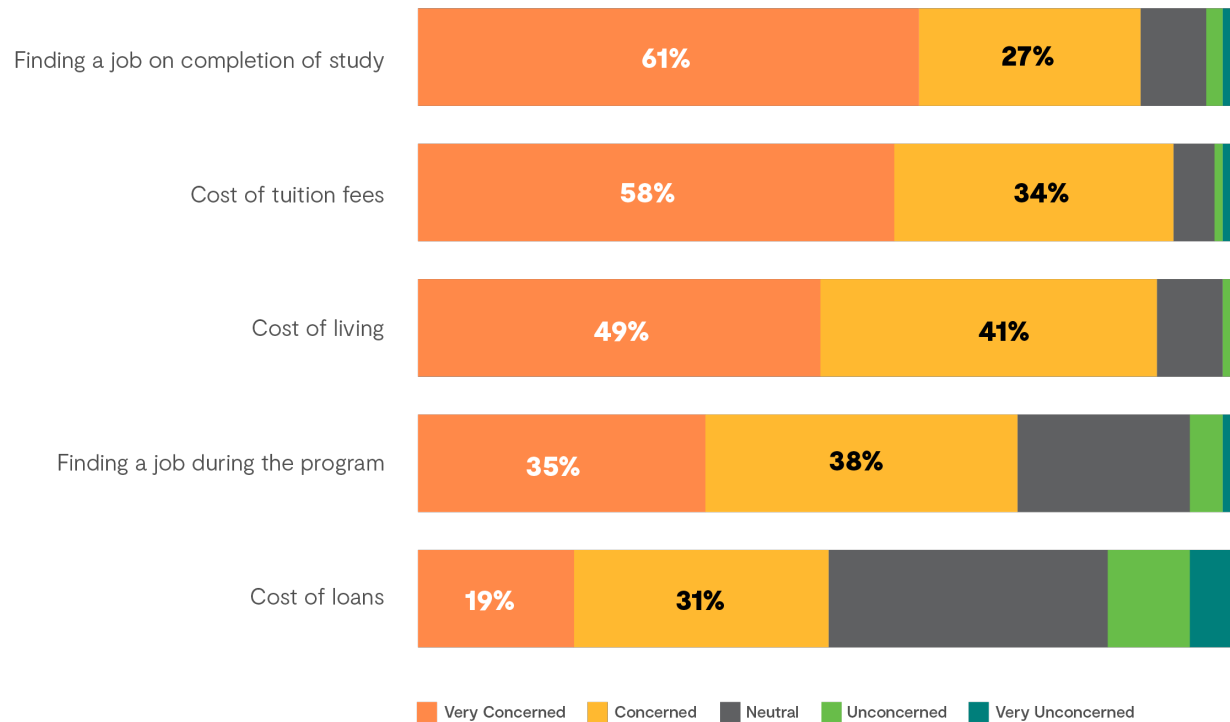
*% Respondents*



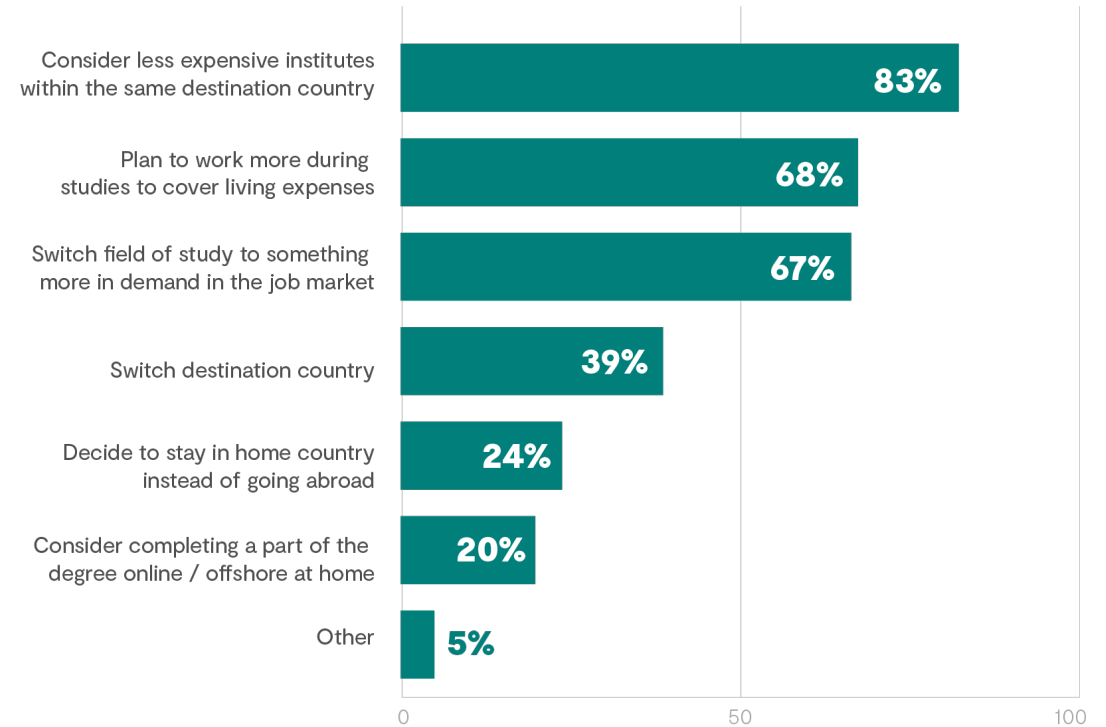
# Impact of current macro-economic climate. Employment post-studies and tuition costs are significant areas of concern for students

Q: On the whole, how concerned are your clients about the following...

% Respondents by Response



Q: For students who are concerned about shifts in the global economy, what do you think are the three most common ways students might respond?



# All Destinations Snapshot

## Safe & Stable

*% respondents who Agree/Strongly Agree the reputation of this destination has improved on this parameter*

## Open & Welcoming

*% respondents who Agree/Strongly Agree the reputation of this destination has improved on this parameter*

## Attractiveness

*% respondents who responded Attractive/Very Attractive*

	Safe & Stable	Open & Welcoming	Attractiveness
Australia	89	85	89
Canada	88	87	90
New Zealand	83	76	62
United Kingdom	77	79	89
USA	56	66	83
Sri Lanka	29	34	22
The Netherlands	63	57	65
Singapore	74	70	49
Germany	64	65	63
UAE (Dubai)	66	69	45

Please visit the Navitas Insights website for  
more detailed commentary and analysis

[insights.navitas.com](https://insights.navitas.com)