



Navitas Agent Perception Survey

Summary Report

Round 9 – June 2025



Message from the CEO

Dear partners,

I am pleased to share this summary report of our ninth Agent Perception Survey with you. These results reflect the views of agents all over the world and provide valuable insights into the factors influencing perceptions of education destinations and the decisions international students are making about higher education.

Once again the findings of this survey provide fascinating data which both validates the behaviours we are seeing in the market, and also offers insights into how the international education landscape is evolving.

Since our 2024 survey we have seen attitudes towards Australia and the UK improve as policy settings have stabilised, reflecting the enduring attractiveness of these markets. It is no surprise that Canada's policy decisions have significantly impacted its reputation as a study destination, but while we were expecting to see a decline in sentiment towards the US, the nature of the decline is perhaps more dramatic than we had anticipated. I would expect to see a rebound in attitudes towards the US and Canada when policy settings in those countries improve.

In response to a declining interest in the established English-speaking destinations, we continue to see an exciting uplift in interest in other destinations like Germany, Dubai and Singapore. I am excited to see how this sentiment, which reflects trends we are seeing ourselves, presents opportunities for providers like Navitas and our university partners in the future.

We use these valuable insights to advocate for the international higher education sector in important discussions with governments and ensure the agent voice is heard through commentary in the media and on the Navitas Insights platform.

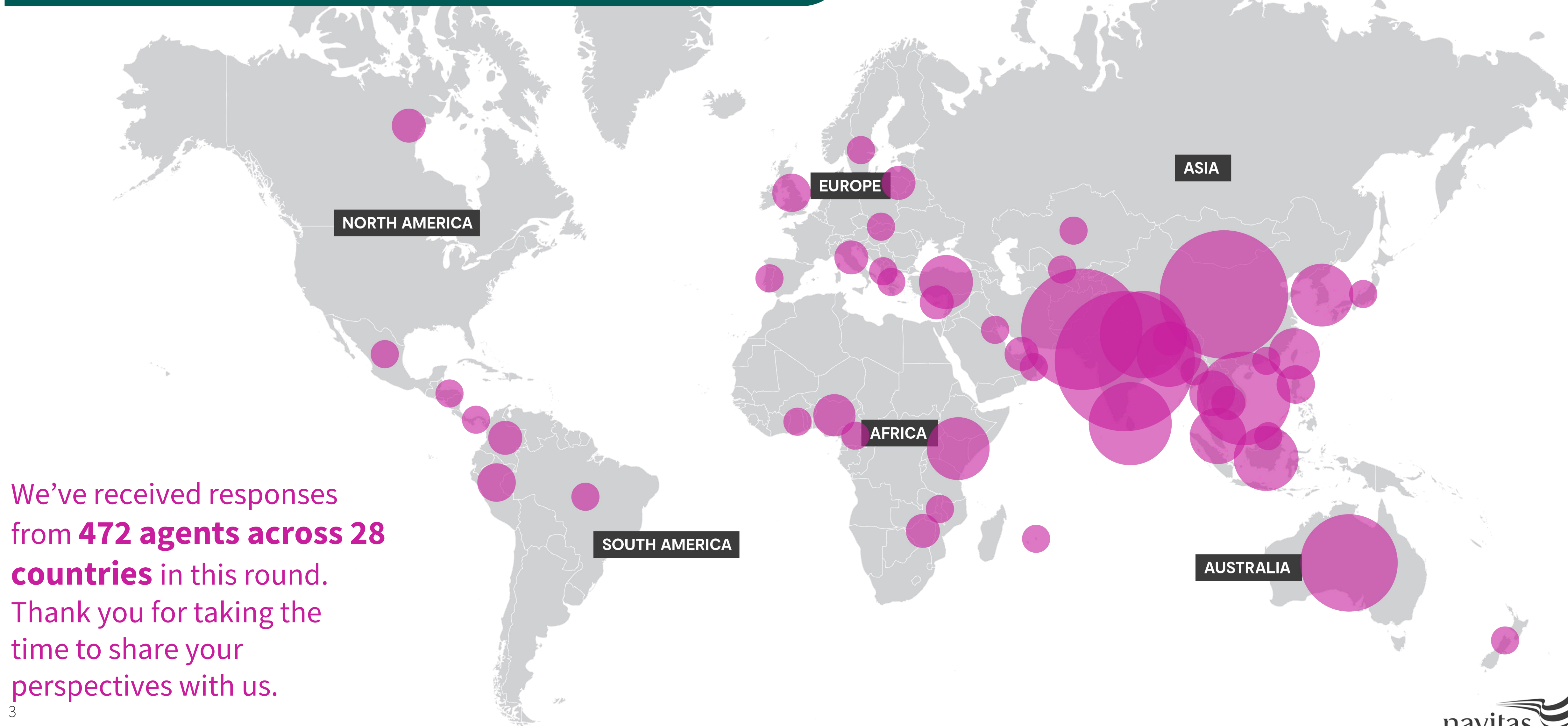
It is a privilege to share these insights with you today.

Warm regards,

Scott Jones



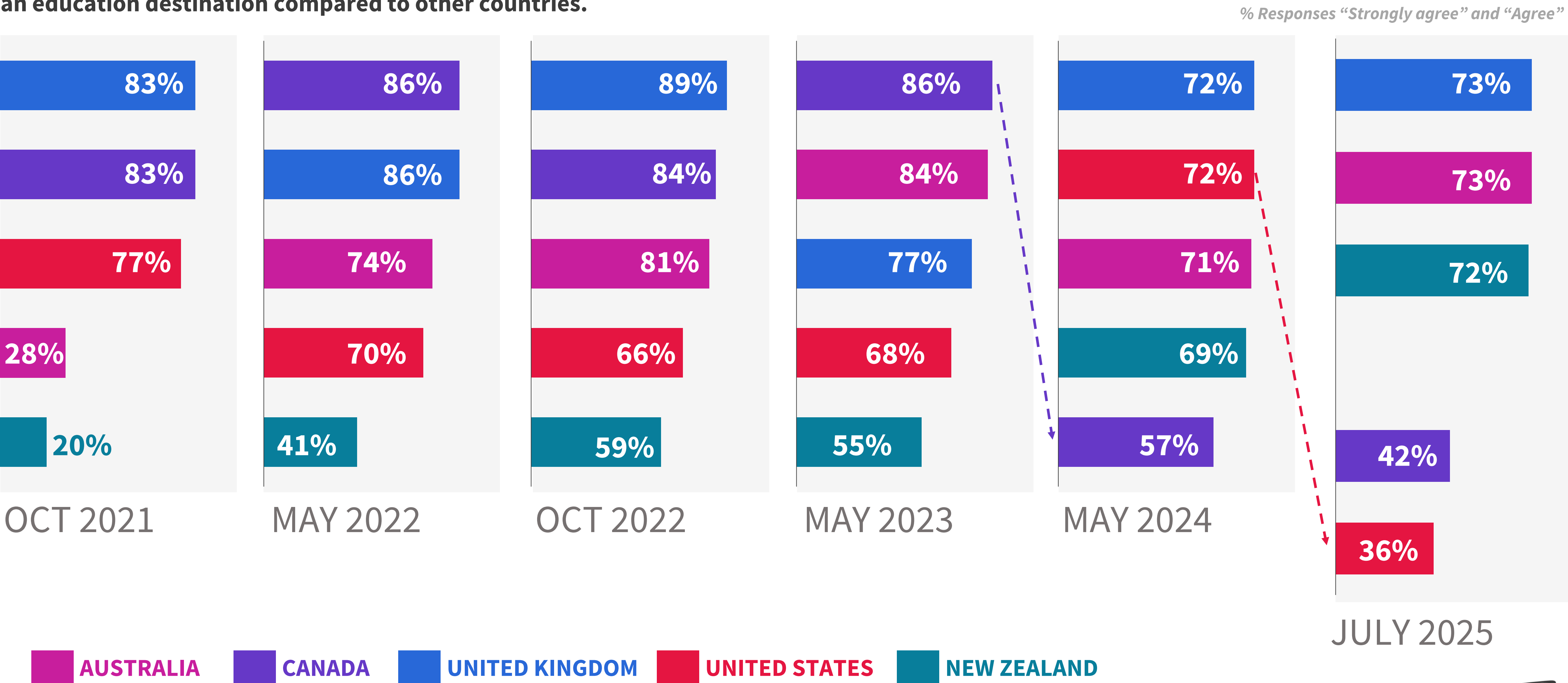
We conducted the first Agent Perception survey at the beginning of the pandemic (May 2020) and are now at Round 9.



We've received responses from **472 agents across 28 countries** in this round. Thank you for taking the time to share your perspectives with us.

Interest in studying in Canada has continued to decline while the US has plummeted sharply. The UK, Australia and New Zealand continue to garner strong interest.

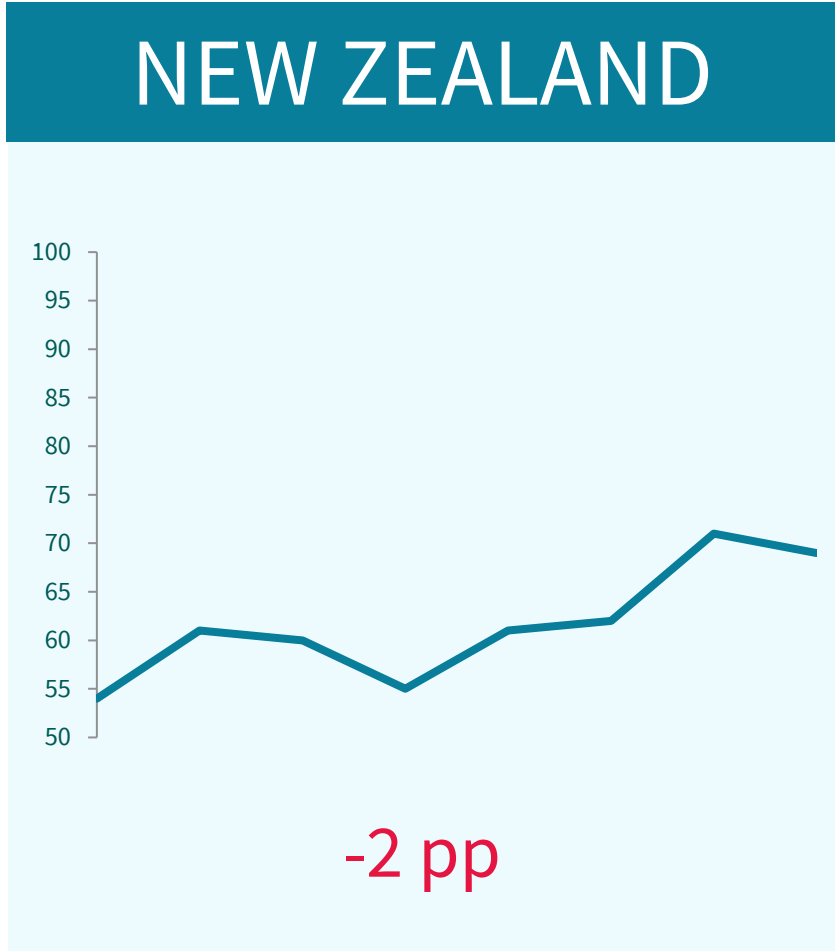
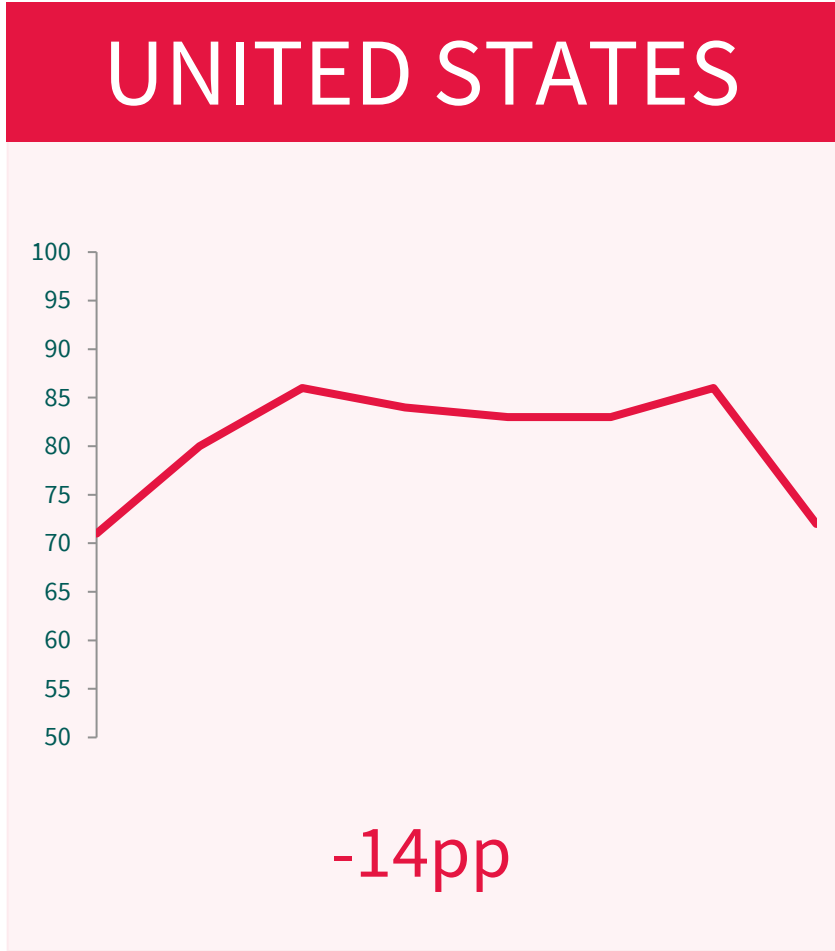
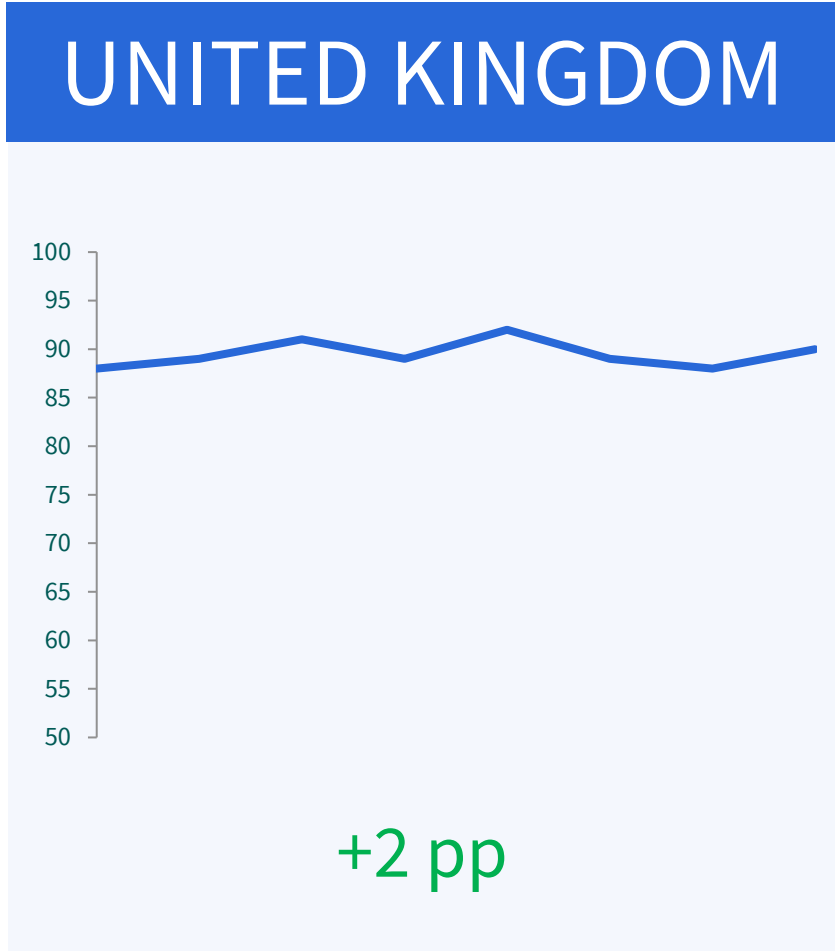
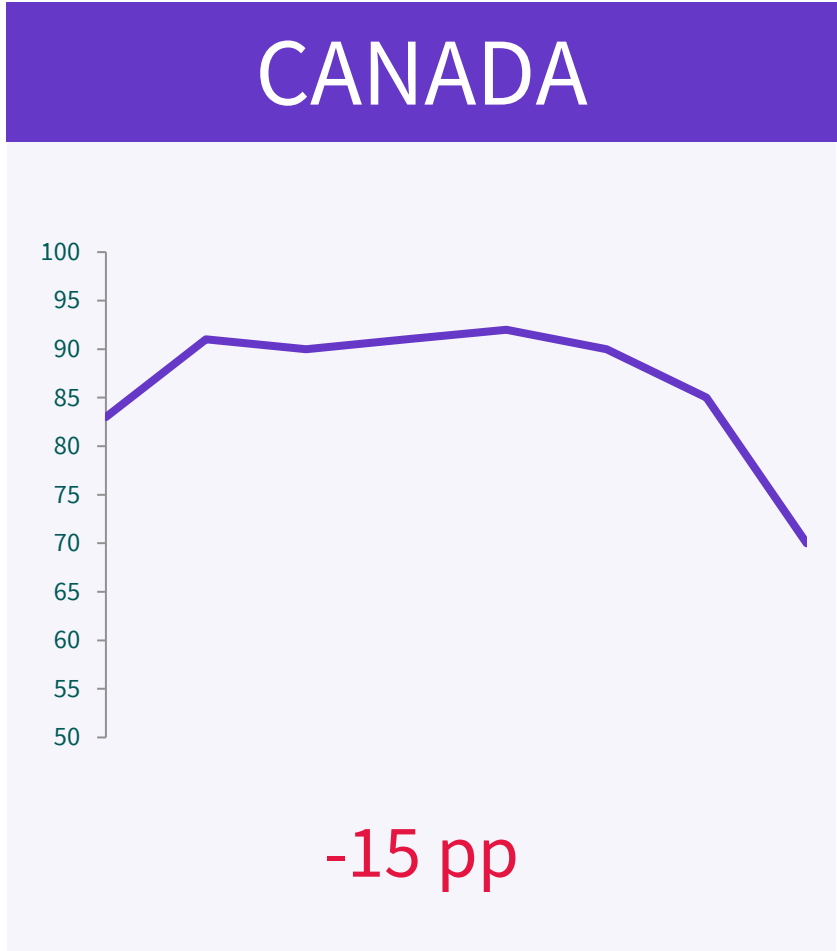
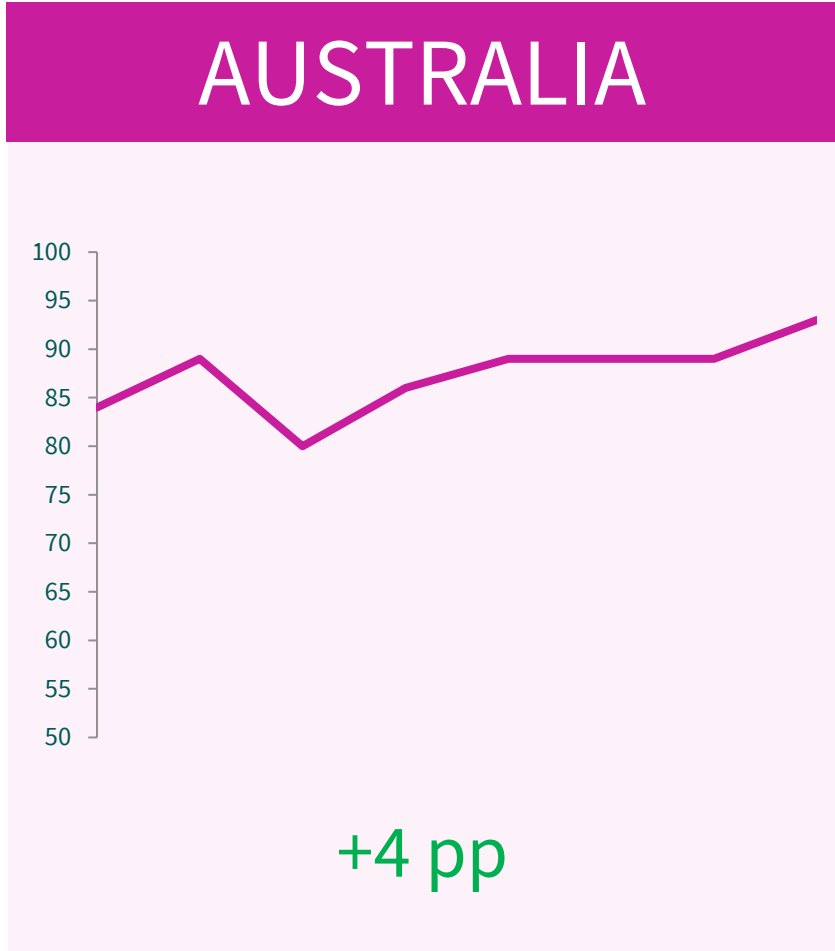
Q: Over the past two months, there has been more interest in this country as an education destination compared to other countries.



Destination attractiveness is usually robust but is now deteriorating to pandemic levels for the US and Canada, which could be a sign of longer-term reputational damage.

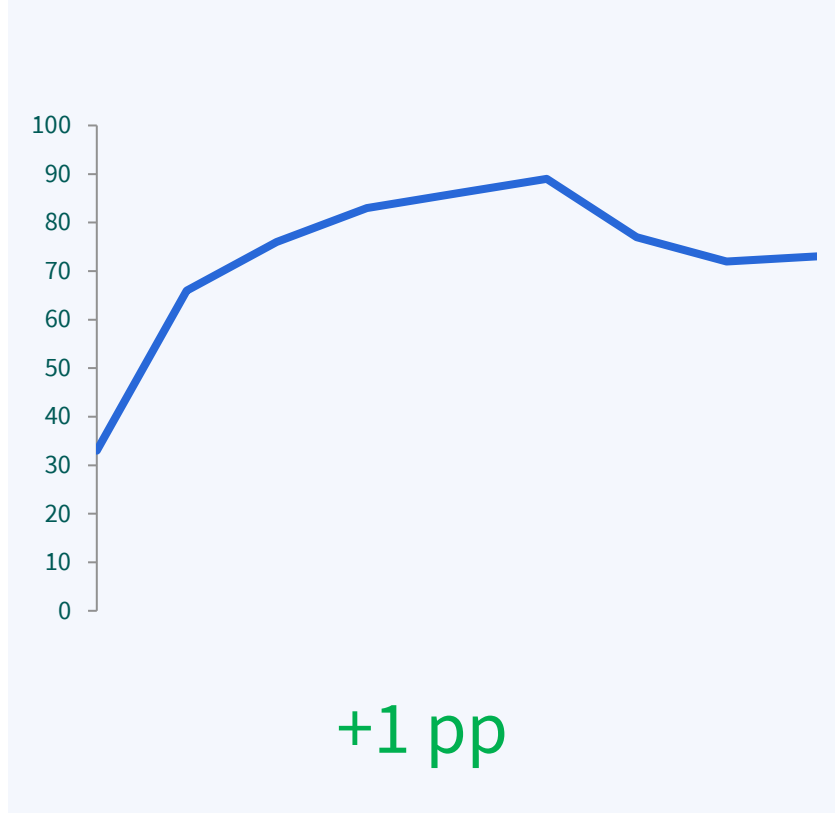
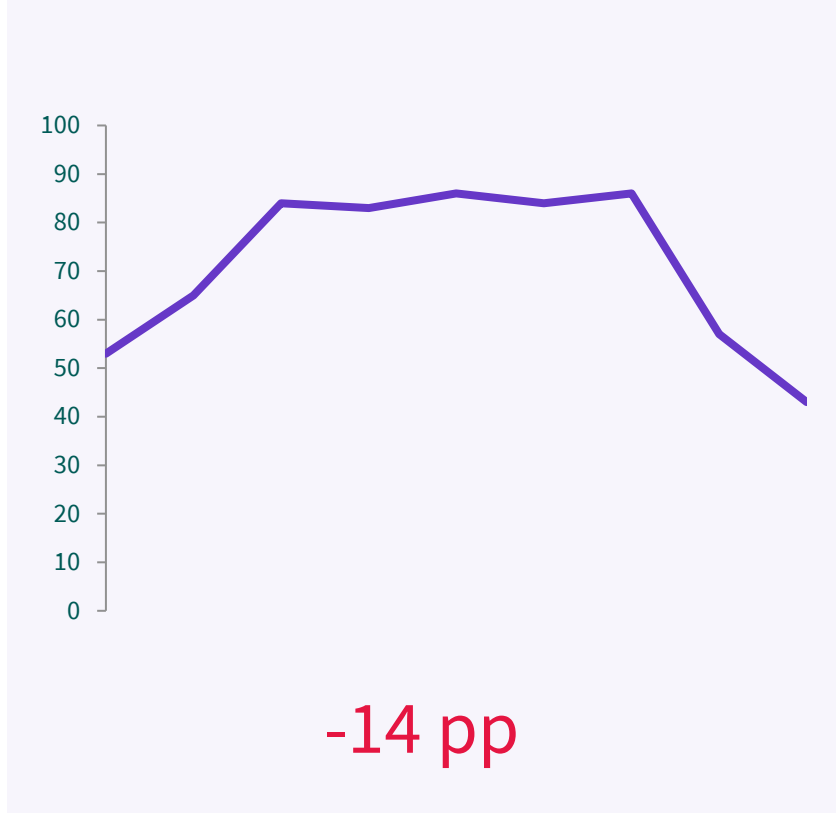
“Destination attractiveness”

Change since last year

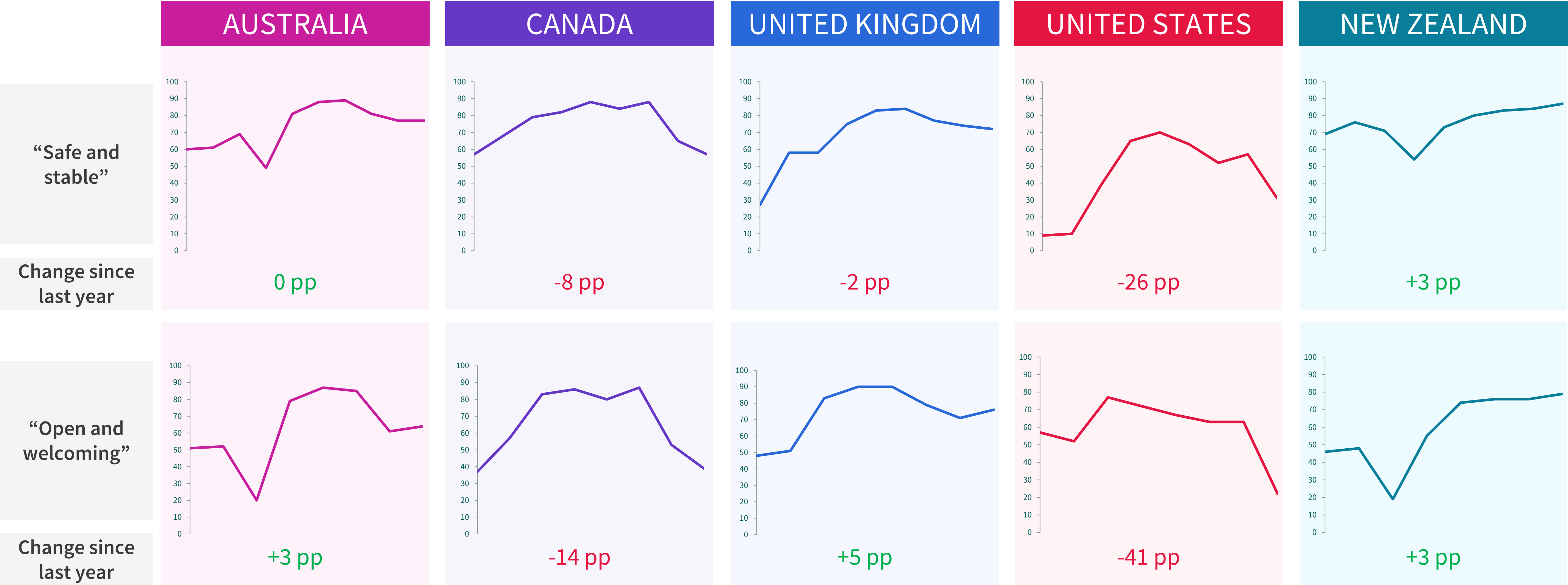


“More interest”

Change since last year



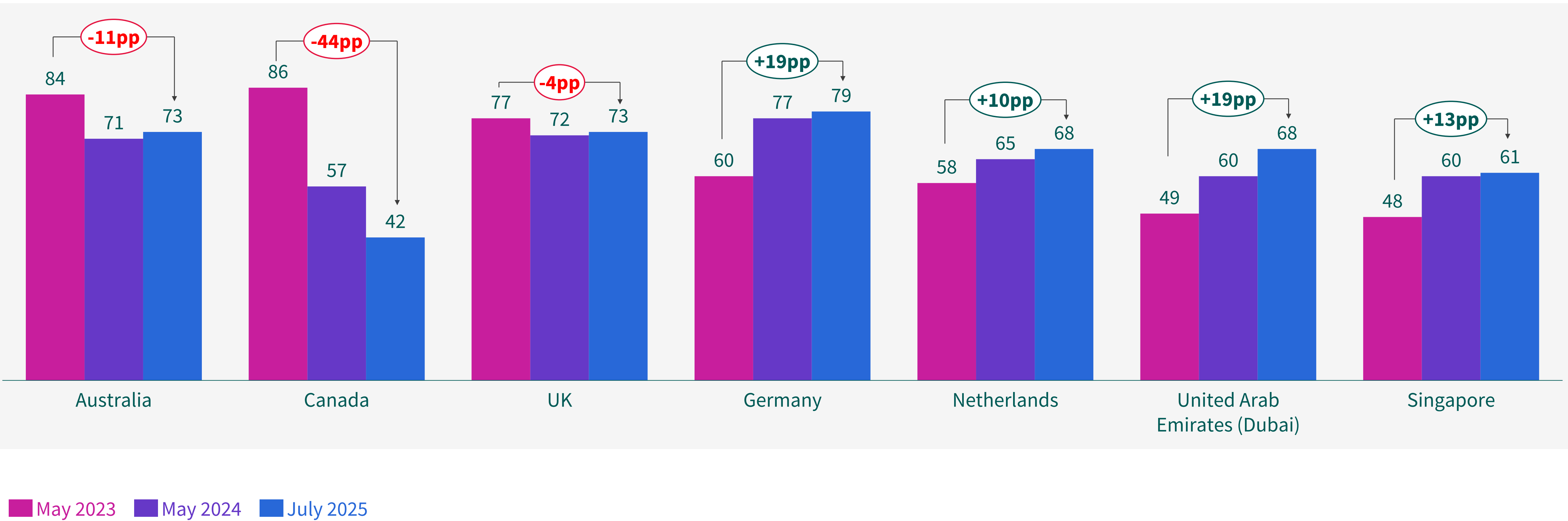
The perception of Australia, Canada, the UK and the US have been impacted by policy instability, but Australia and the UK have managed to improve their reputation for being open and welcoming.



Decreased interest in the major English-speaking destinations has led to a sustained increase in interest in other destinations like Germany, Singapore, the UAE, and the Netherlands.

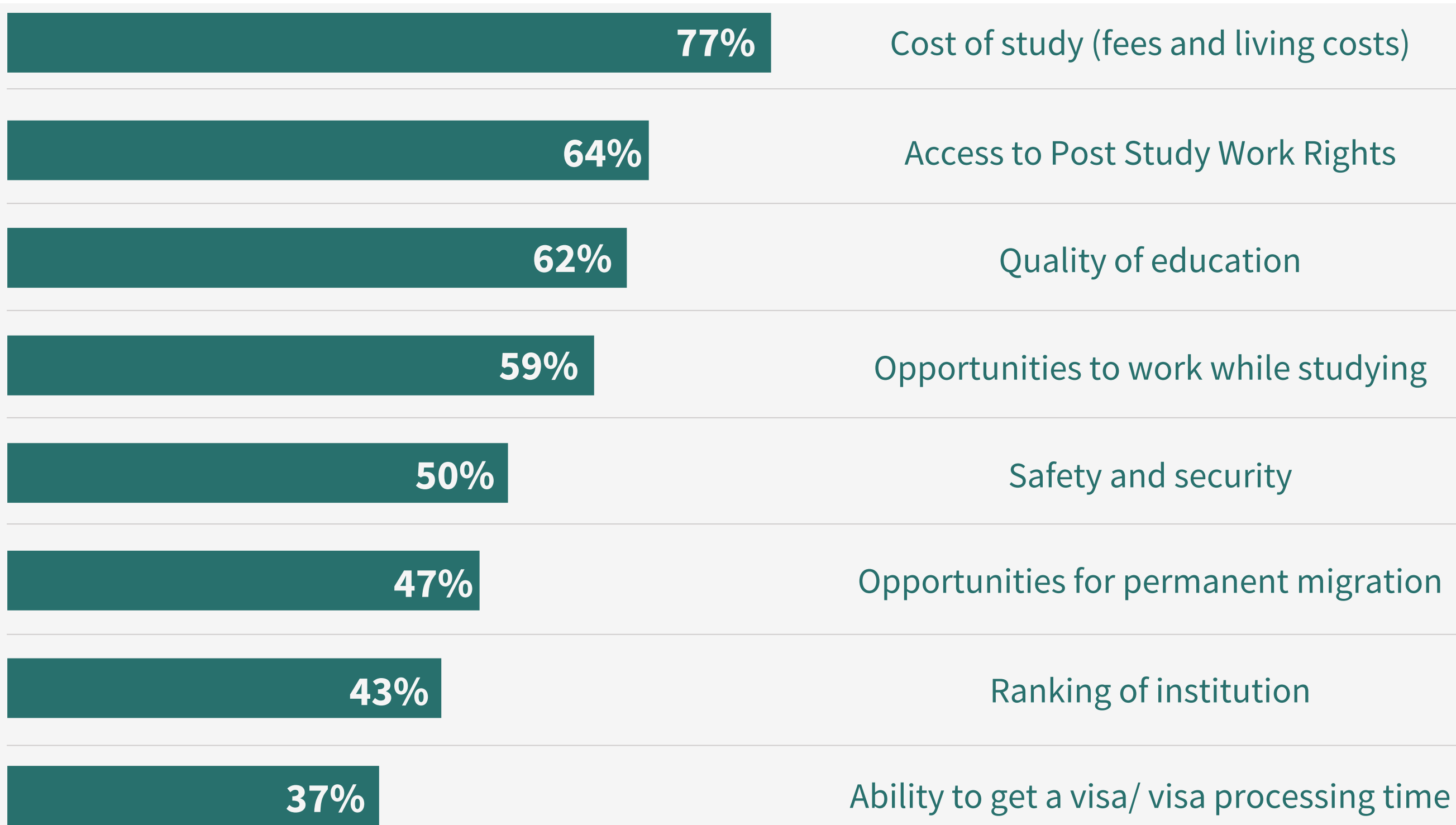
Q: Over the past two months, there has been more interest in this country as an education destination compared to other countries.

% Responses “Strongly agree” and “Agree”

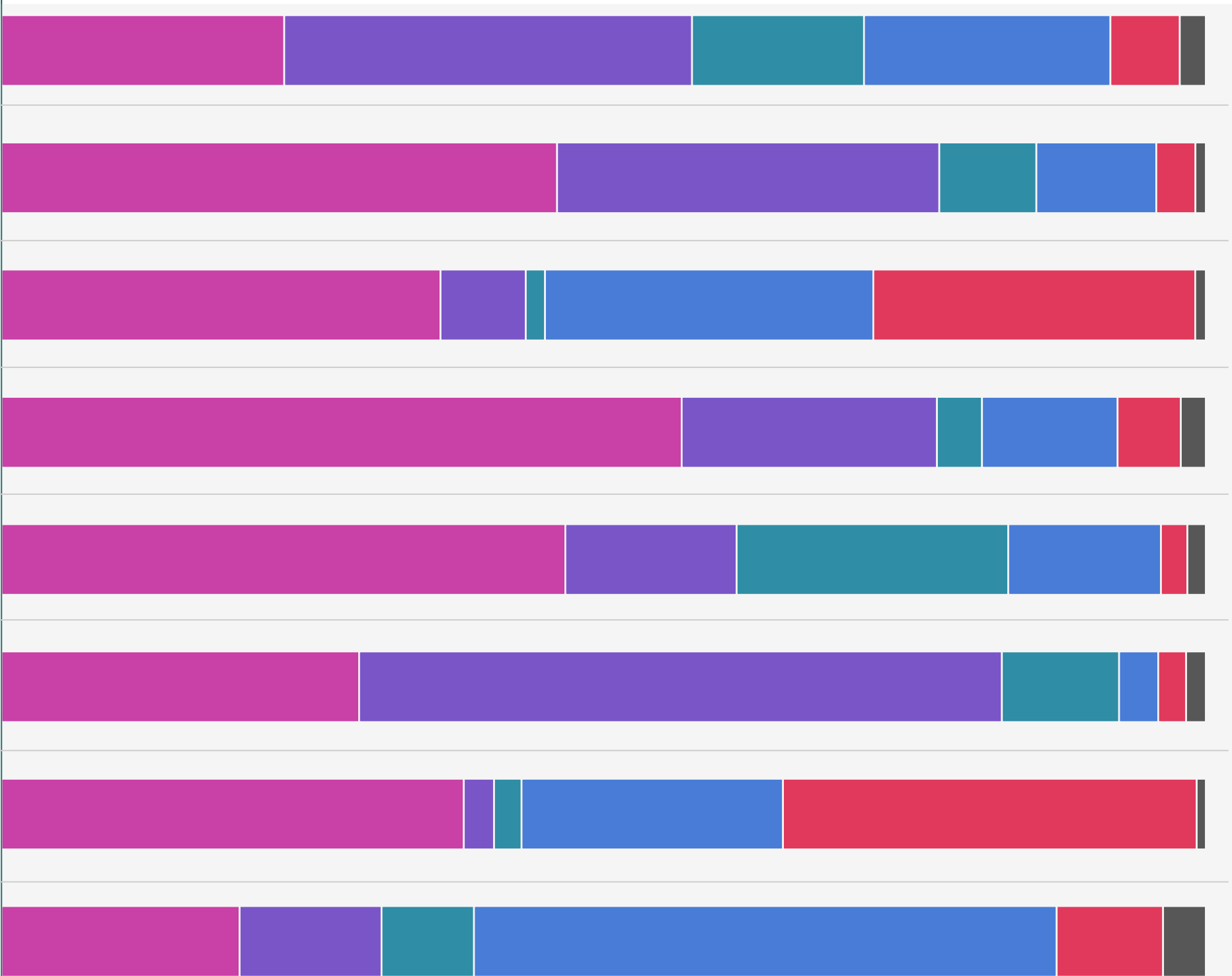


Cost of study and access to post-study work rights remain the two most cited factors of influence in this survey.

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?



Australia Canada New Zealand United Kingdom United States Don't Know

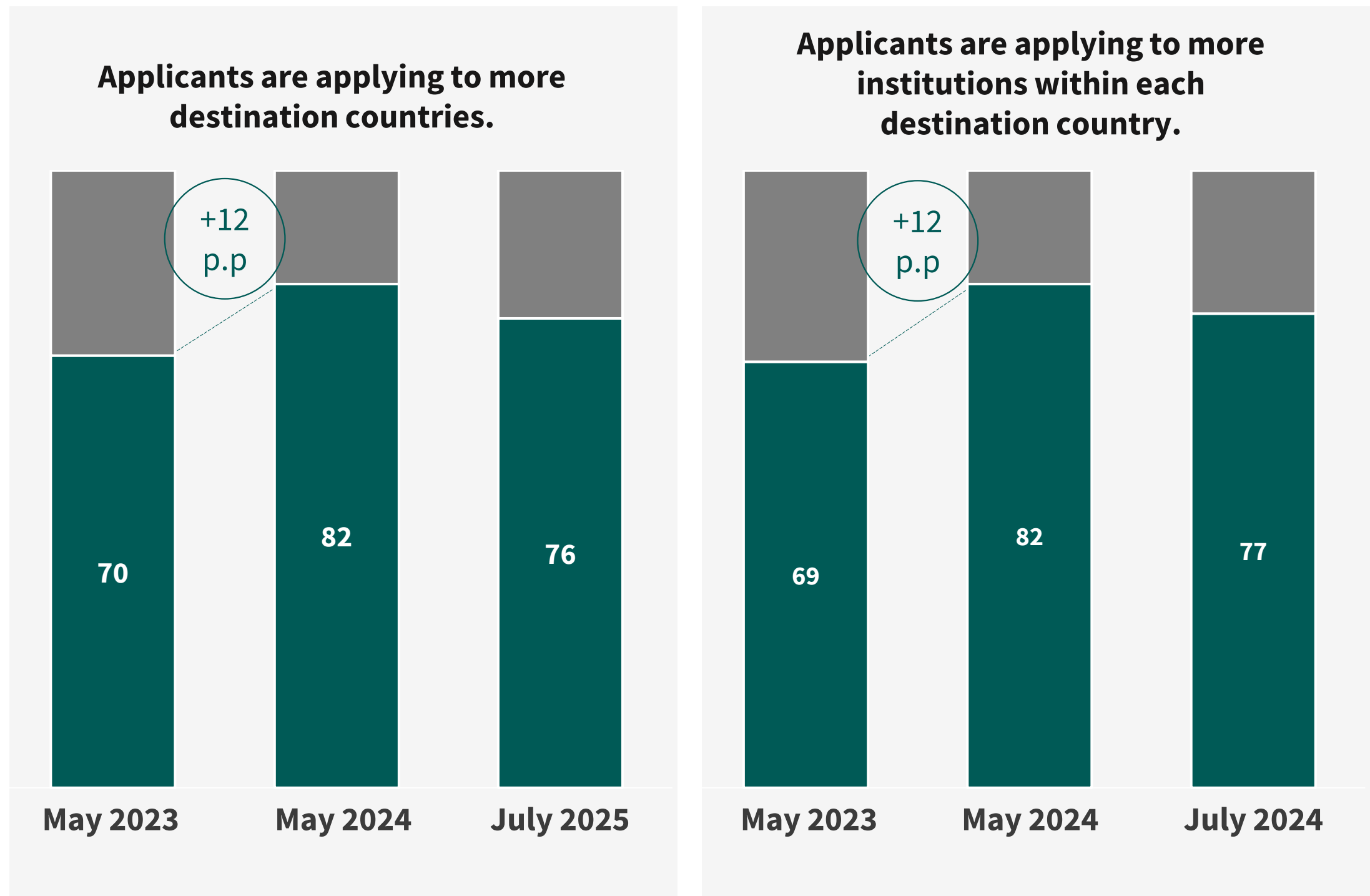
Cost and PSWR have been the top two concerns for the last three years. Opportunities to work and pathways to residency have increased in importance this year.

| | Rank 2023 | Rank 2024 | Rank 2025 | Change in rank |
|--|-----------|-----------|-----------|----------------|
| Cost of study (fees and living costs) | 1 | 1 | 1 | no change |
| Access to Post Study Work Rights | 2 | 2 | 2 | no change |
| Opportunities to work while studying | 3 | 4 | 3 | + 1 rank order |
| Opportunities for permanent migration | 5 | 6 | 4 | + 2 rank order |
| Quality of education | 4 | 3 | 5 | - 2 rank order |
| Ability to get a visa/ visa processing time | 9 | 8 | 6 | + 2 rank order |
| Safety and security | 6 | 5 | 7 | - 2 rank order |
| Ranking of institution | 7 | 7 | 8 | - 1 rank order |
| Quality of life in destination | 8 | 9 | 10 | - 1 rank order |
| Relationship between own country and destination country | 11 | 10 | 11 | - 1 rank order |

Agents confirm that applicants are applying to more destinations outside of the big 4, but are also increasingly prepared to study in their home country or to cancel their plans

Q: Please indicate to what extent you would agree to the following statements regarding changes in student needs and choices in the past twelve months

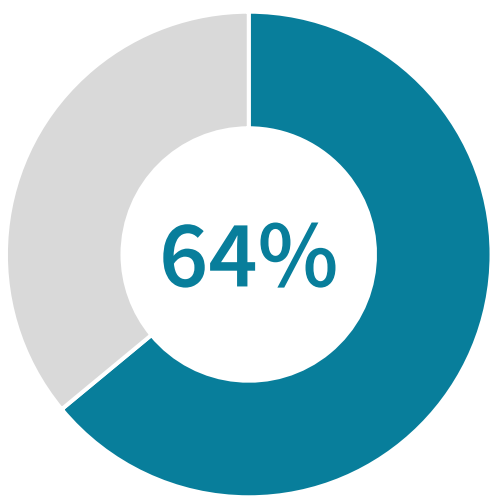
% of Respondents by Response



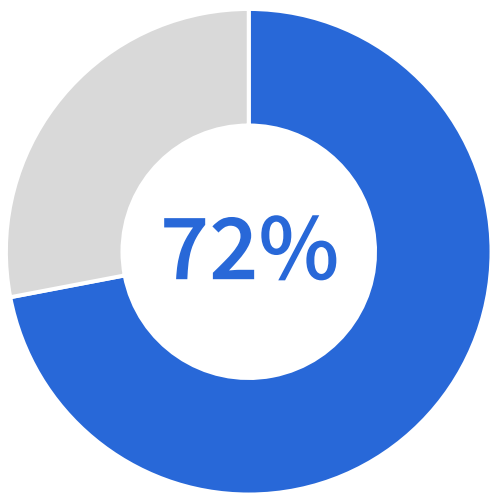
Strongly Agree + Agree Neutral + Disagree

Applicants are...

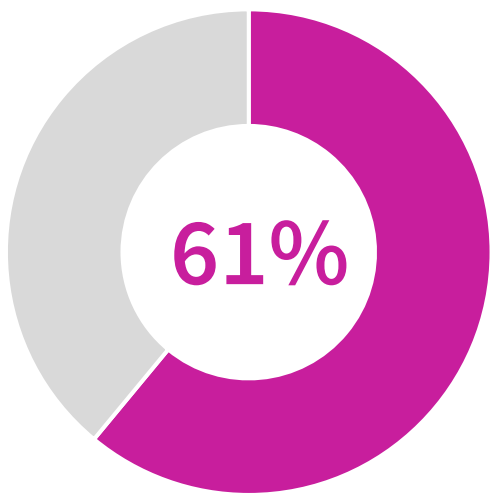
% Responses “Strongly agree” and “Agree”



...applying to more destination countries outside of the US, UK, Australia and Canada.



...more likely to have a back-up plan to study in their home country.



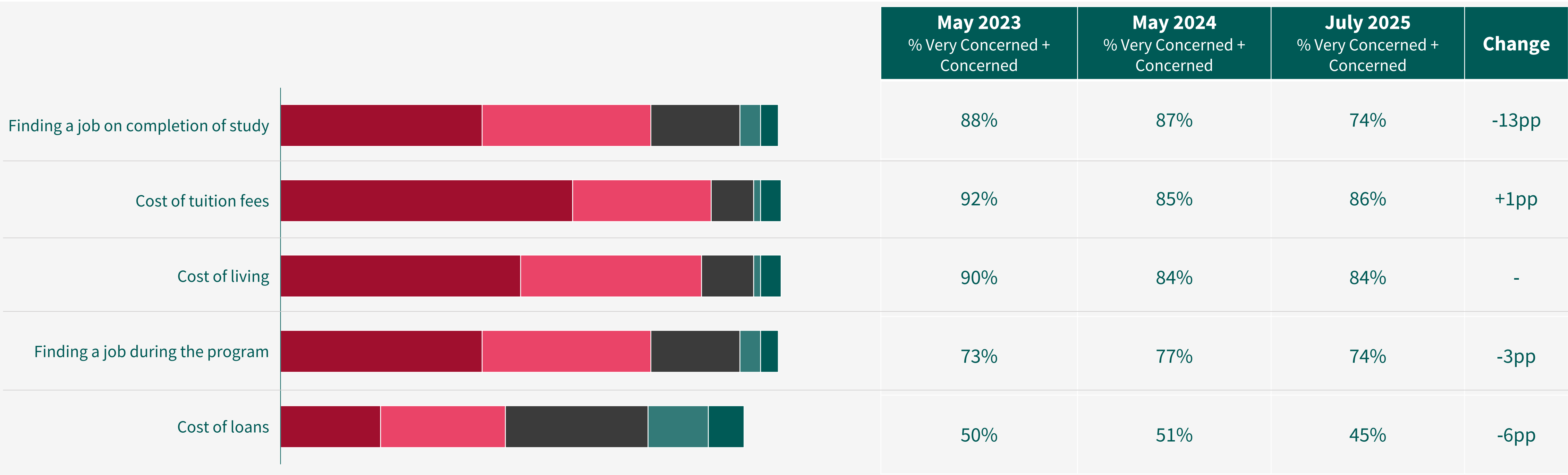
...more likely to give up on their plans to study abroad due to lack of affordability.

In the current macro-economic climate, agents indicate students are most concerned about tuition fees and the cost of living.

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

% of Respondents by Response

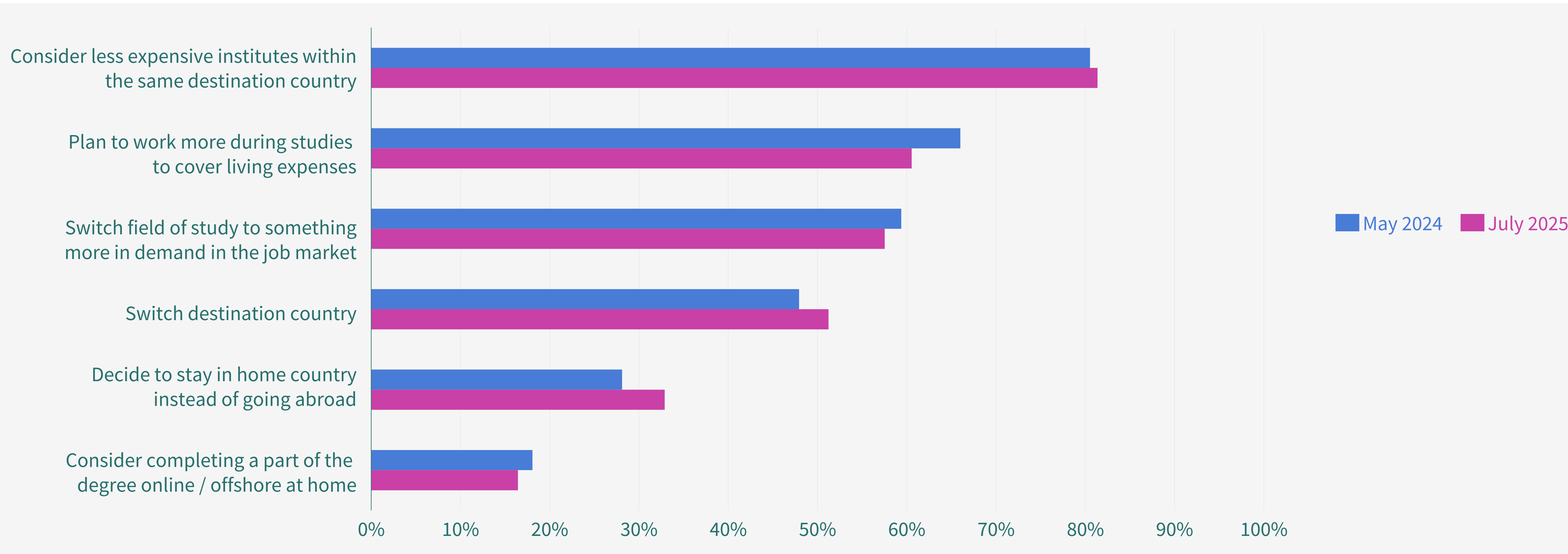
Comparison to last year



Very concerned
Concerned
Neutral
Unconcerned
Very unconcerned

Agents report a moderation in how students are responding to economic conditions, but students are more likely to switch destination countries or stay home.

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 destination snapshot

Safe and 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

| Australia | 77 | 64 | 93 |
|-----------------|----|----|----|
| Canada | 57 | 39 | 70 |
| New Zealand | 87 | 79 | 69 |
| United Kingdom | 72 | 76 | 90 |
| USA | 31 | 22 | 72 |
| Sri Lanka | 24 | 40 | 24 |
| The Netherlands | 77 | 69 | 66 |
| Singapore | 79 | 74 | 56 |
| Germany | 77 | 82 | 77 |
| UAE (Dubai) | 75 | 80 | 47 |
| France | 68 | 76 | 69 |
| Indonesia | 38 | 54 | 33 |



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

insights.navitas.com