



Navitas Agent Perception Survey

Summary Report
Round 10 - May 2026

Message from the CEO

Dear partners,

It is my pleasure to share this preview report from our tenth Agent Perception Survey. The findings capture the views of education agents around the world and offer valuable insight into how destinations are perceived, and the choices international students are making with their guidance.

This summary report updates the Navitas Agent Perception Survey story for Round 10 conducted in May 2026. The results reflect the views of 870 agents across 64 countries and show a market still shaped by affordability challenges, policy settings, destination reputation and student confidence.

Once again, the results offer compelling data that both confirms the behaviours we are seeing, and sheds light on how the international education landscape continues to evolve in the current economic and geopolitical environment.

Cost of study remains the most cited factor influencing destination choice, with post-study work rights, quality of education, safety, work rights and migration pathways continuing to shape agent advice.

To everyone who took part in this survey, thank you for so generously sharing your perspectives and insights with us.

We draw on these insights to advocate for the international higher education sector in our discussions with governments, ensuring the agent voice is clearly heard and reflected in the broader conversation. It is a genuine privilege to share our findings with you.

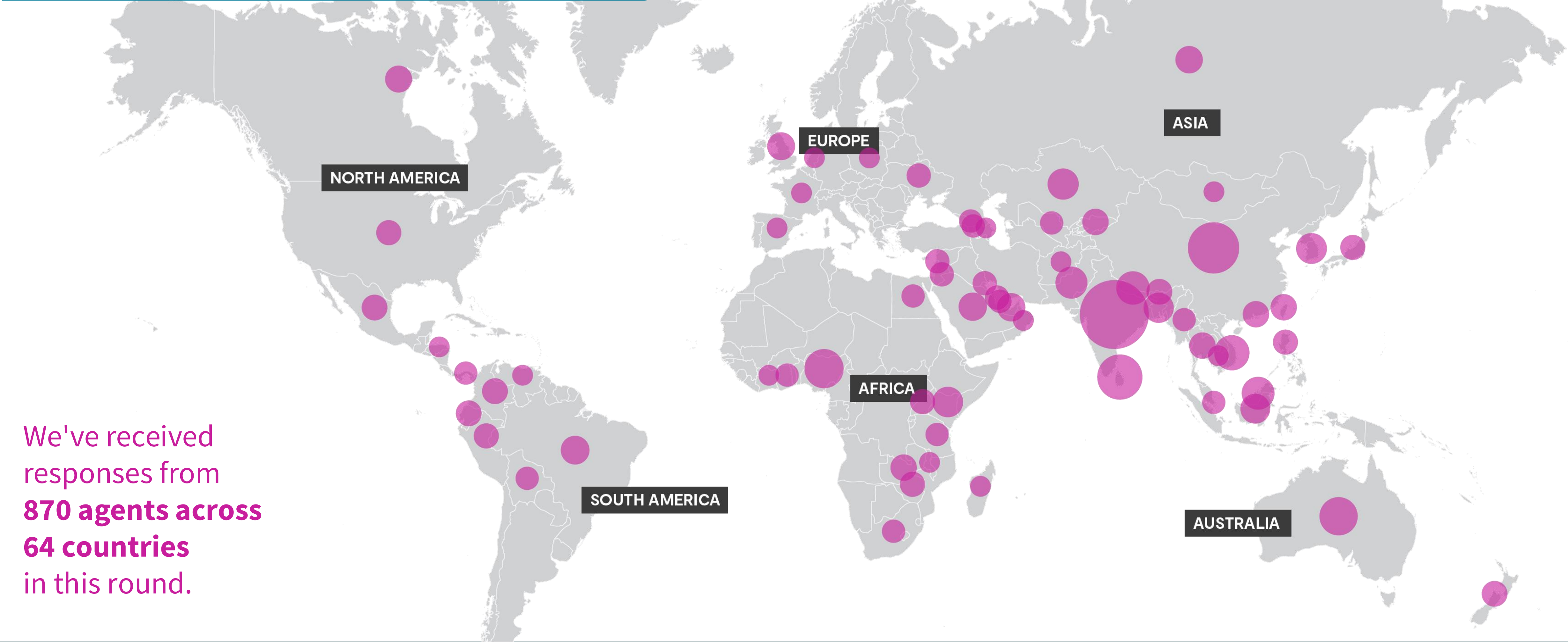
Warm regards,



Scott Jones
Group CEO, Navitas



We conducted the first Agent Perception survey at the beginning of the pandemic (May 2020) and are now at Round 10 (May 2026).



We've received responses from **870 agents across 64 countries** in this round.

Executive summary

International student decision-making is becoming more cost-driven, risk-aware and complex - while agent expertise remains critical

Trust in study destinations is shifting across key markets, with continued competition between established and emerging destinations and mixed movements in sentiment

Students are widening their options and managing risk, applying to more countries and institutions, considering alternatives beyond traditional destinations, and maintaining home-country back-up plans

Cost pressures are shaping both destination choice and student behaviour, with affordability, post-study outcomes and value for money central to decision-making

Student expectations are continuing to rise, with increased need for academic, social and wellbeing support alongside academic delivery

Visa policy and processing are increasingly influencing student choice, with differences in certainty, processing time and outcomes impacting destination attractiveness, sometimes in unintended ways

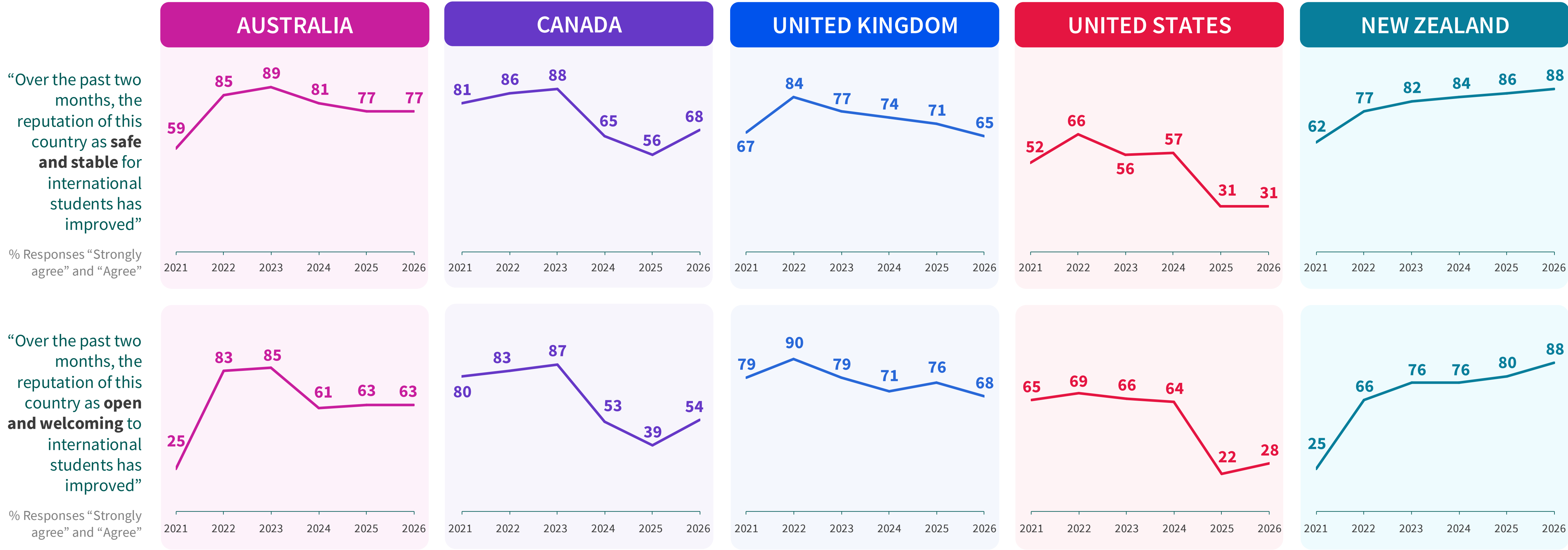
AI is reshaping early-stage research behaviour, but agents remain central to decision-making as trusted advisors and validators of information

Trust in study destinations is shifting across key markets



Trust in top study destinations is diverging

Canada appears to be turning around, New Zealand builds momentum, Australia maintains appeal, the US remains unfavourable, and the UK continues to slide

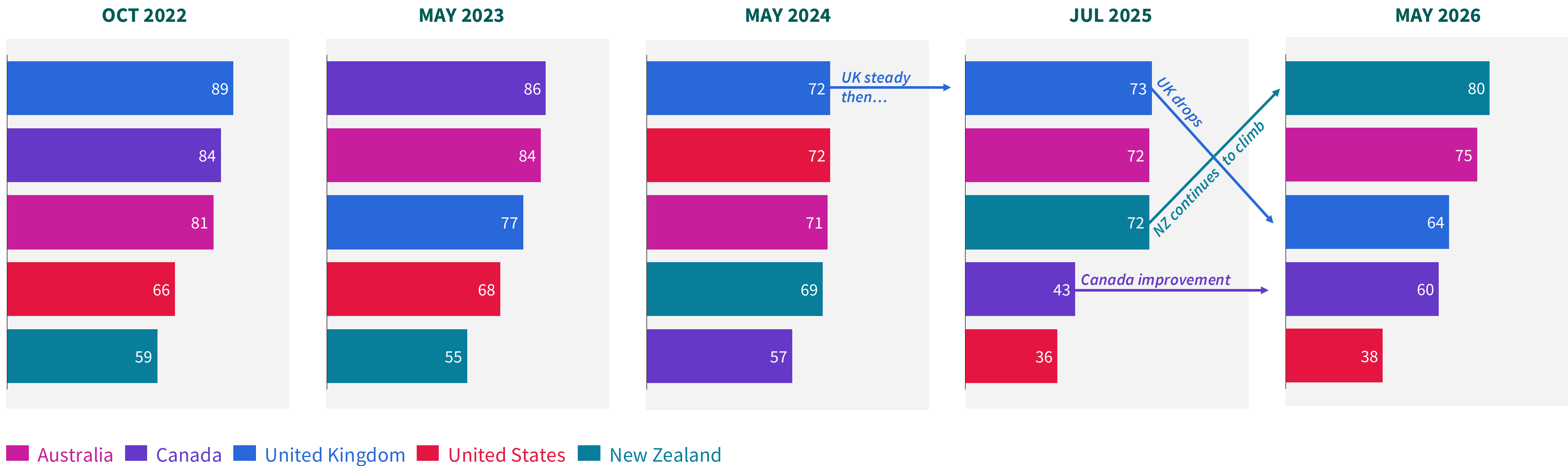


Relative interest remains competitive across the major study destinations, with New Zealand taking the lead

Australia maintains its position and Canada sees improvement after two years of declining interest, while the UK plummets, and the US languishes

“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”

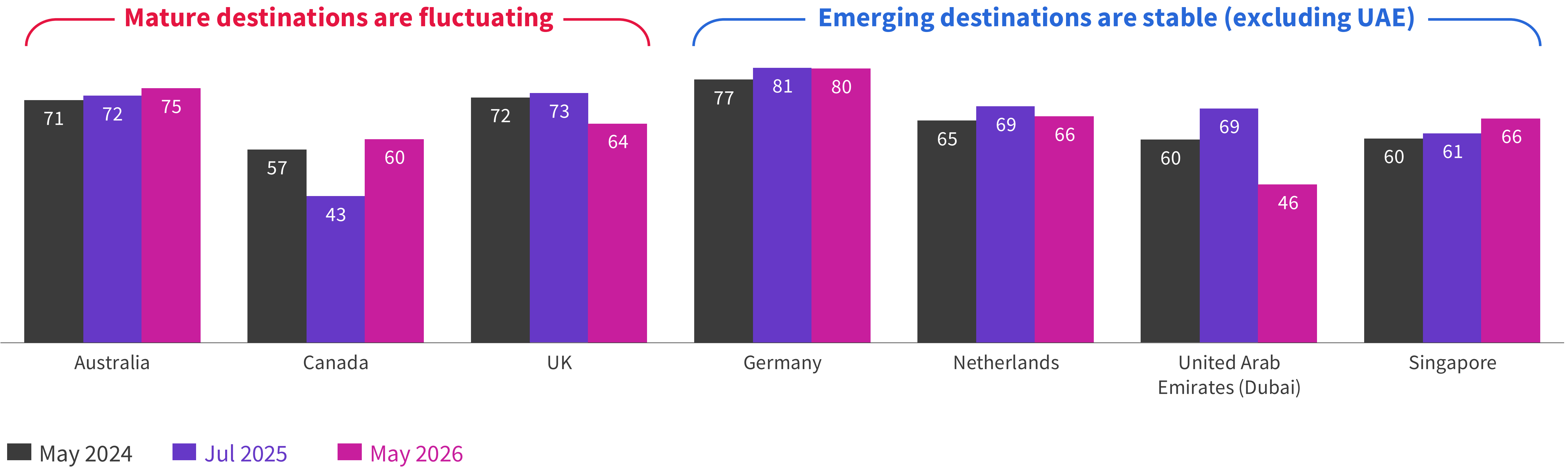


Interest has shifted away from traditional destinations

The war in the Middle East has resulted in an understandable drop in interest in the UAE, but Europe remains consistently attractive, and interest in Singapore continues to grow

“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”



All destination snapshot

New Zealand is the clear winner on all domains, followed by Germany and Singapore, with Australia maintaining a strong position overall

Safe and stable

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

Open and welcoming

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

More interest

% respondents who Agree/Strongly Agree that there has been more interest in this country over the past two months

Australia	77	63	75
Canada	68	54	60
Germany	78	77	80
Indonesia	33	45	33
New Zealand	88	88	80
Singapore	80	78	66
Sri Lanka	40	43	27
The Netherlands	73	71	66
UAE	40	59	46
United Kingdom	65	68	64
United States	31	28	38

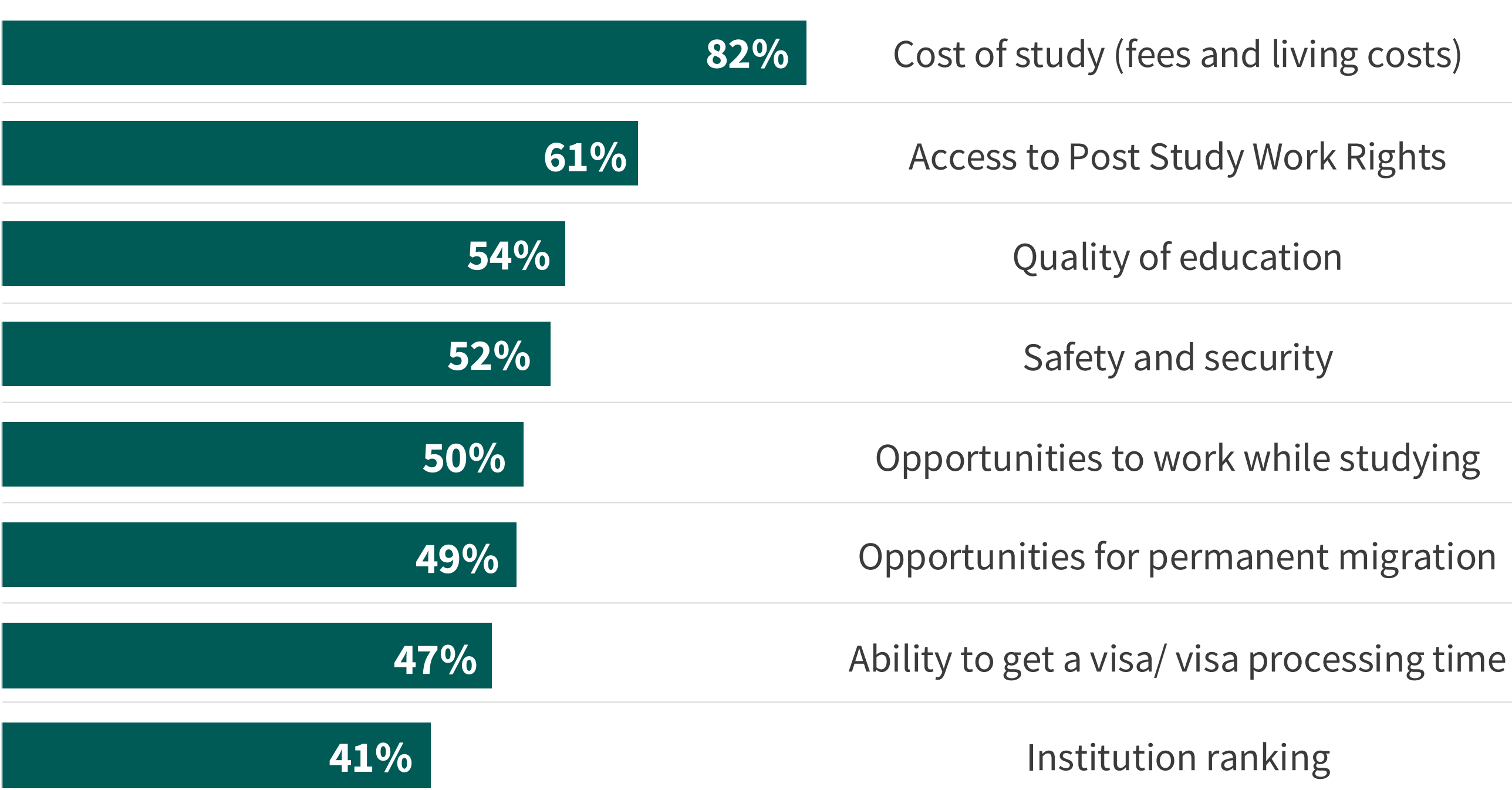
A photograph of a classroom with several students sitting at long wooden tables. In the foreground, a student with long dark hair is writing in a notebook. Behind her, another student with glasses and a pink shirt is looking at a tablet. Further back, a student in a white shirt is smiling. To the right, a male student in a grey hoodie is looking at a laptop, and another male student in a dark hoodie is looking down. The room has large windows in the background, letting in natural light. The text 'Cost pressures are dominating student choices' is overlaid on the left side of the image in a large, white, sans-serif font.

Cost pressures are dominating student choices

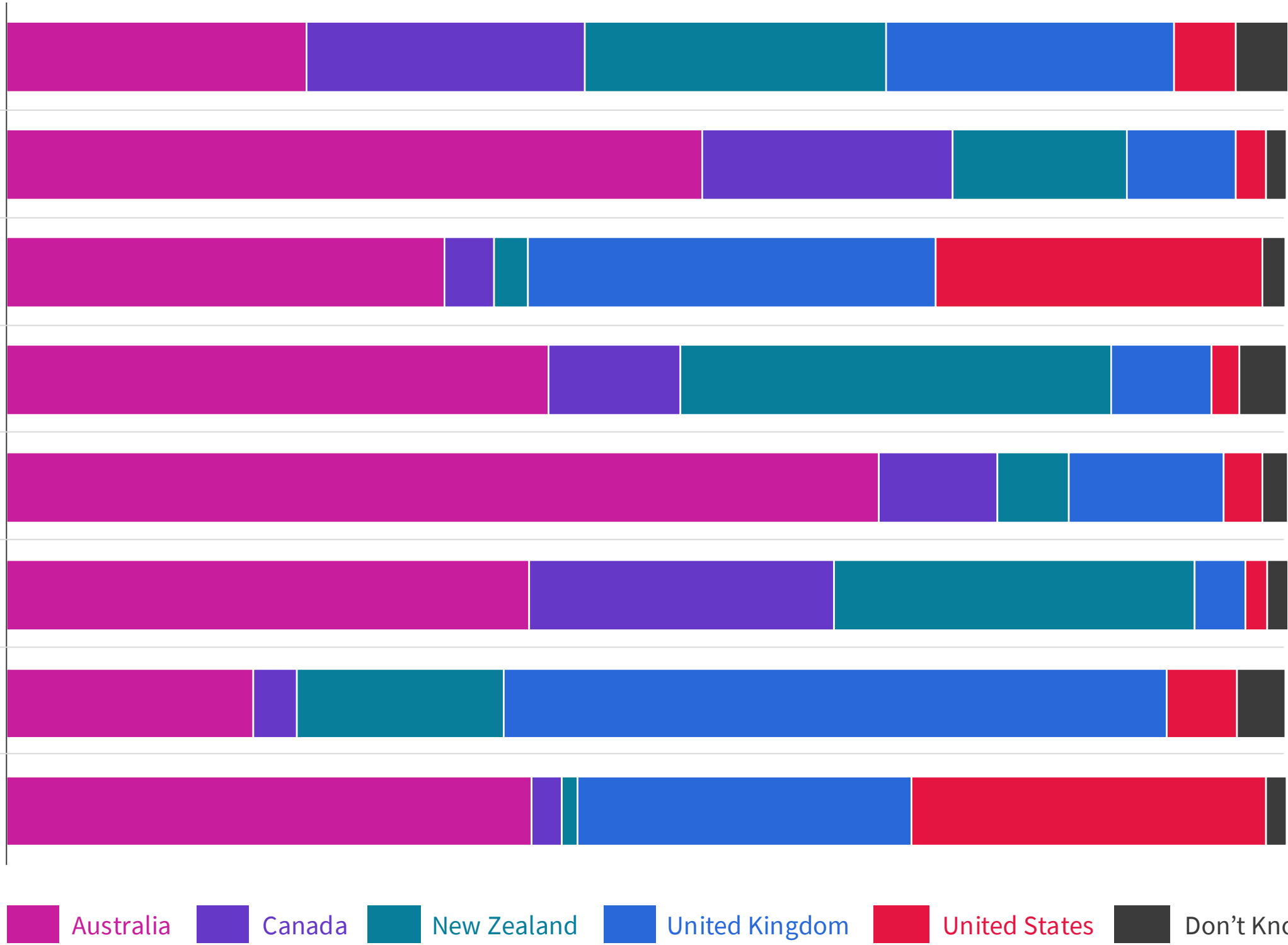
Cost, work rights, and education quality remain the core drivers of destination choice

Australia retains strong appeal across most factors, with the exception of visa processing

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



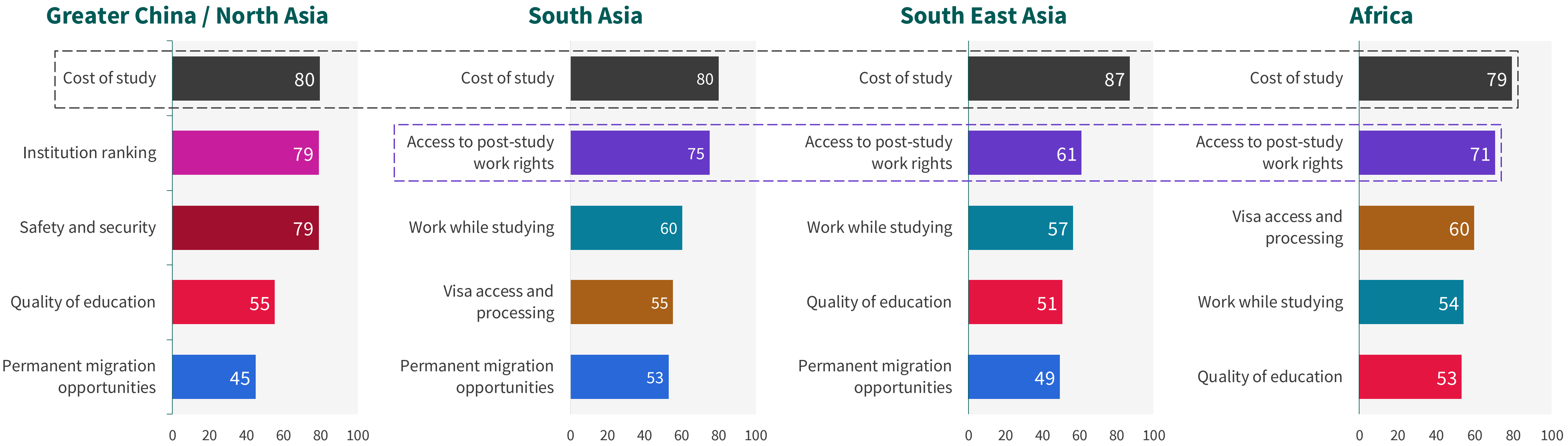
Q: For each of the factors you selected in the previous question, which is the **most appealing destination**?



Across recruitment regions, the leading drivers behind destination choice are aligned

Cost of study and post-study work opportunities are steering student choice, while visa processing is an especially important factor for South Asia and Africa

Q: What are currently the most important factors influencing student choice of study destination? **Top 5 factors by region**

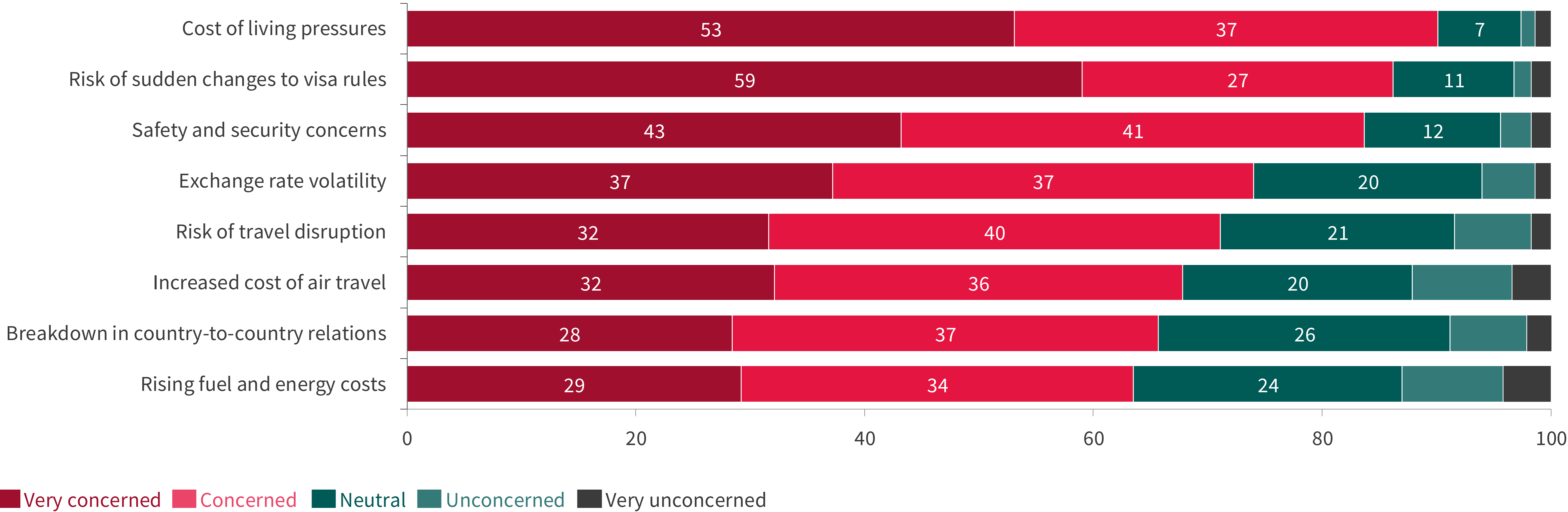


Agents report students being concerned about most things, but cost pressures, changes to visa rules, and safety are top of mind

Agents and counsellors increasingly need to provide guidance and advice across a range of issues and areas

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

% of Respondents by Response



A background image showing a group of students in a modern, bright classroom or office setting. They are seated at a long white table, working on laptops and tablets. A woman in the foreground is using a tablet, which displays a course management system interface. The interface includes a sidebar with icons for various functions and a main content area with a table of assessments. The text 'Visa processing is influencing student choice, sometimes in unintended ways' is overlaid on the left side of the image in a large, white, sans-serif font.

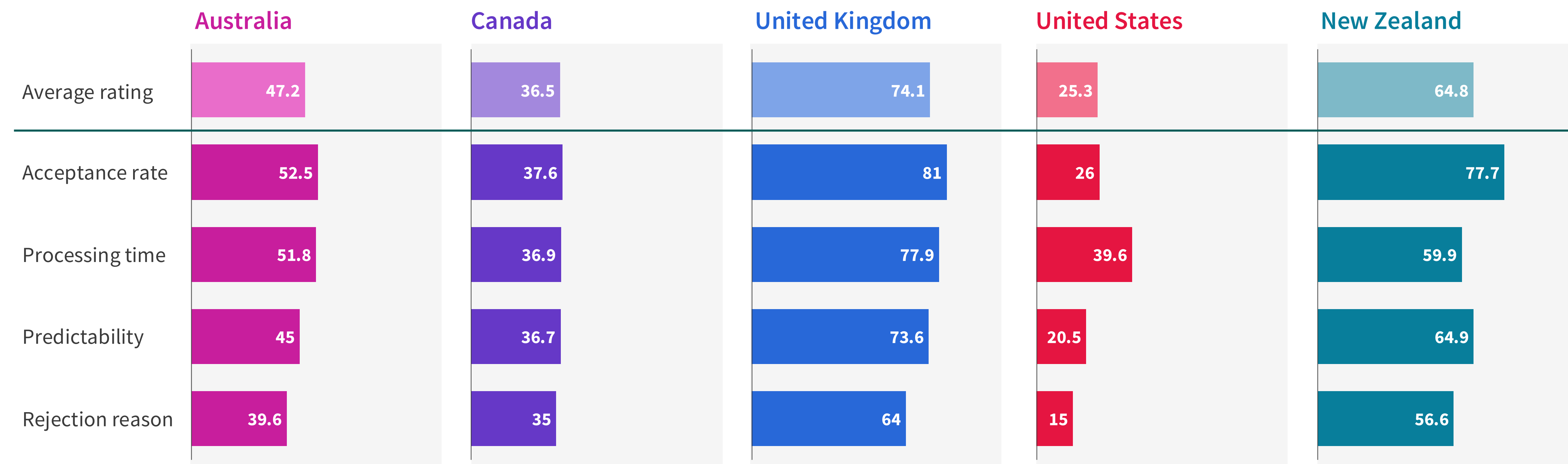
**Visa processing
is influencing
student choice,
sometimes in
unintended ways**

Visa processing in the UK and New Zealand were viewed most favourably while the US and Canada lag behind

Australia sits firmly in the middle of the pack

Q: How do you rate the following destinations in terms of the following aspects of visa processing

% Responses “Good” and “Very Good”

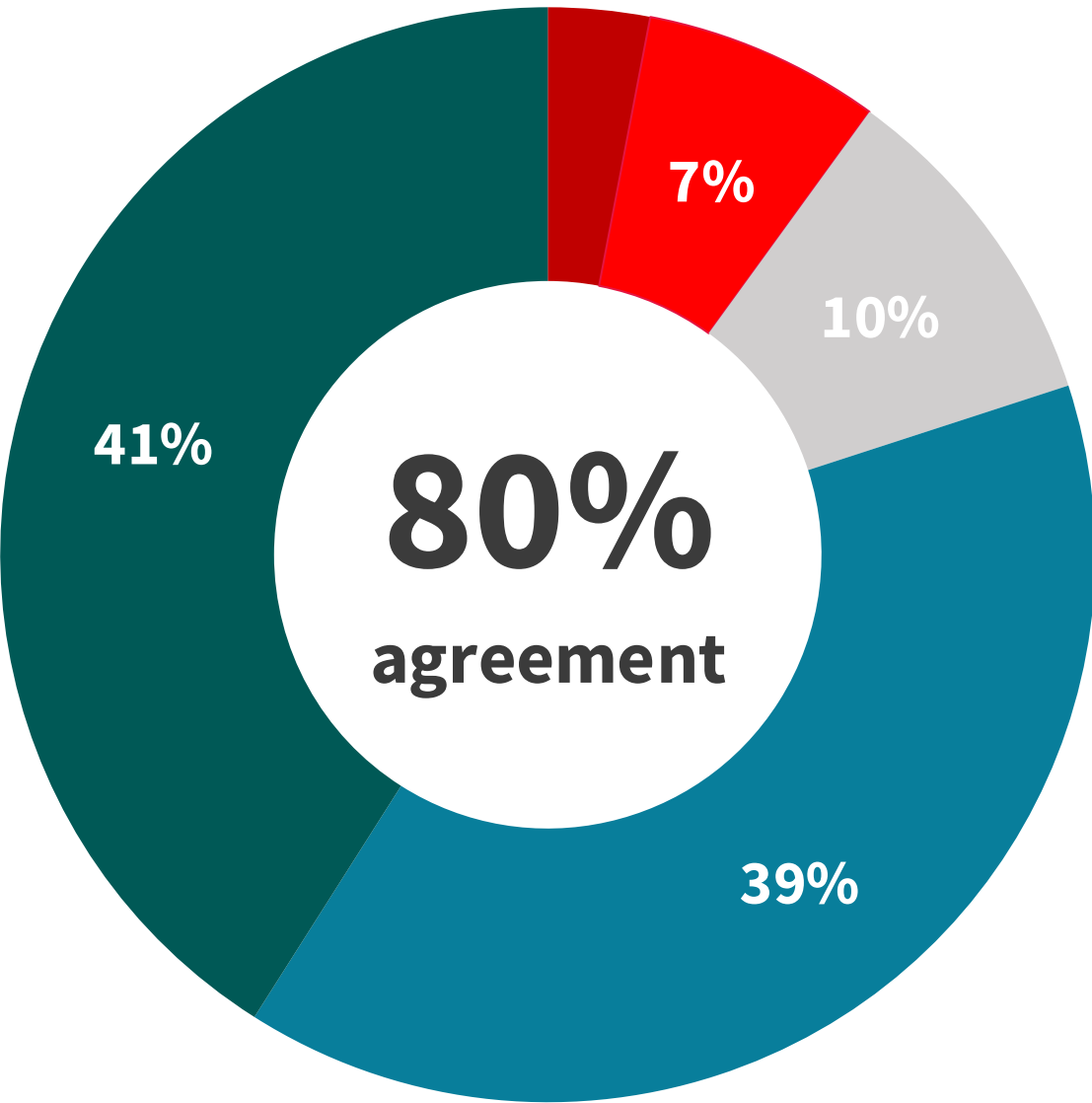


Visa anxiety resulting from processing uncertainties may have unintended consequences on strong applicants

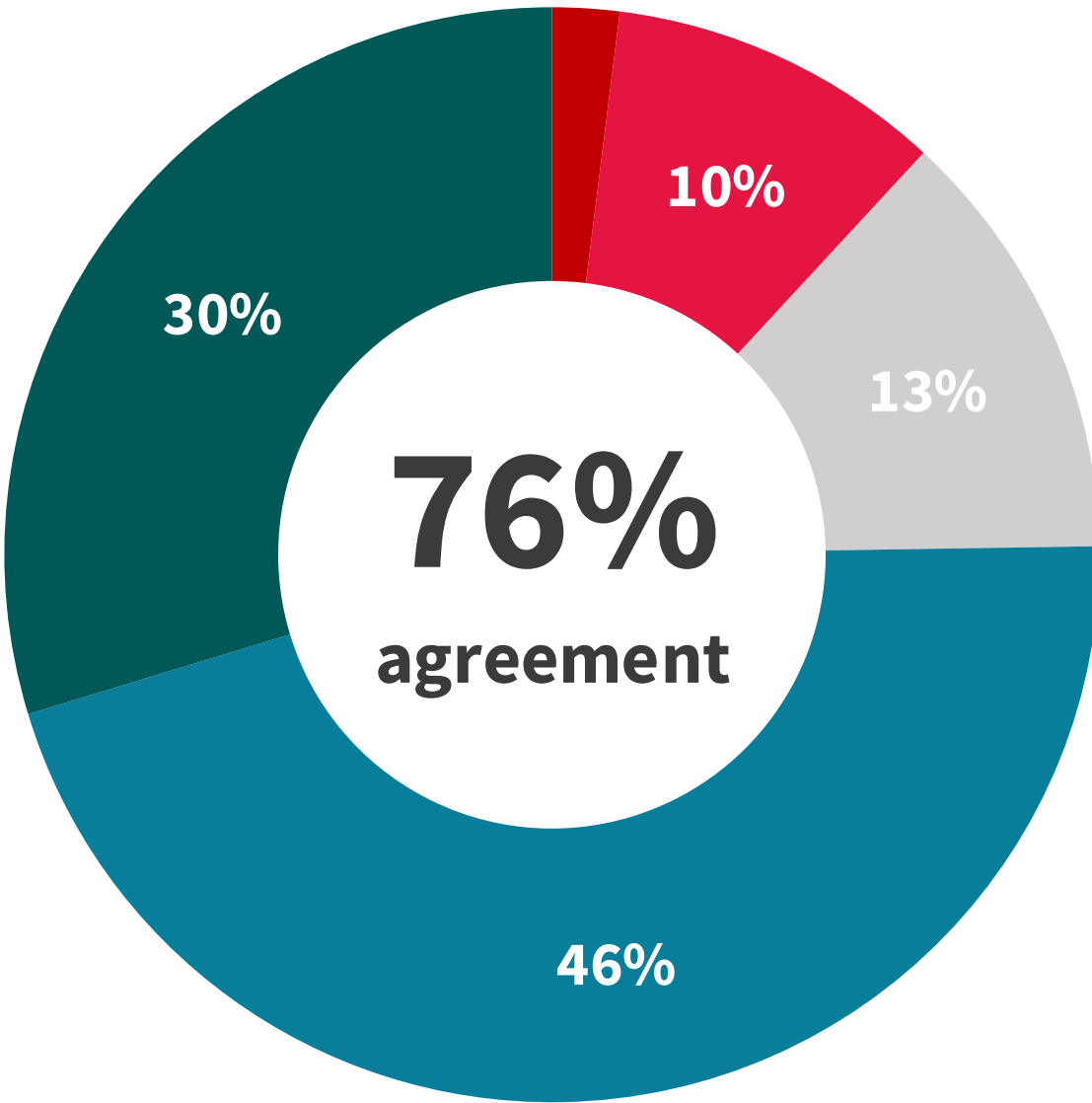
While governments may impose stricter visa requirements to address integrity concerns, genuine and strong applicants may nonetheless be discouraged and choose alternative destinations

Q: To what extent do you agree with the following statements?

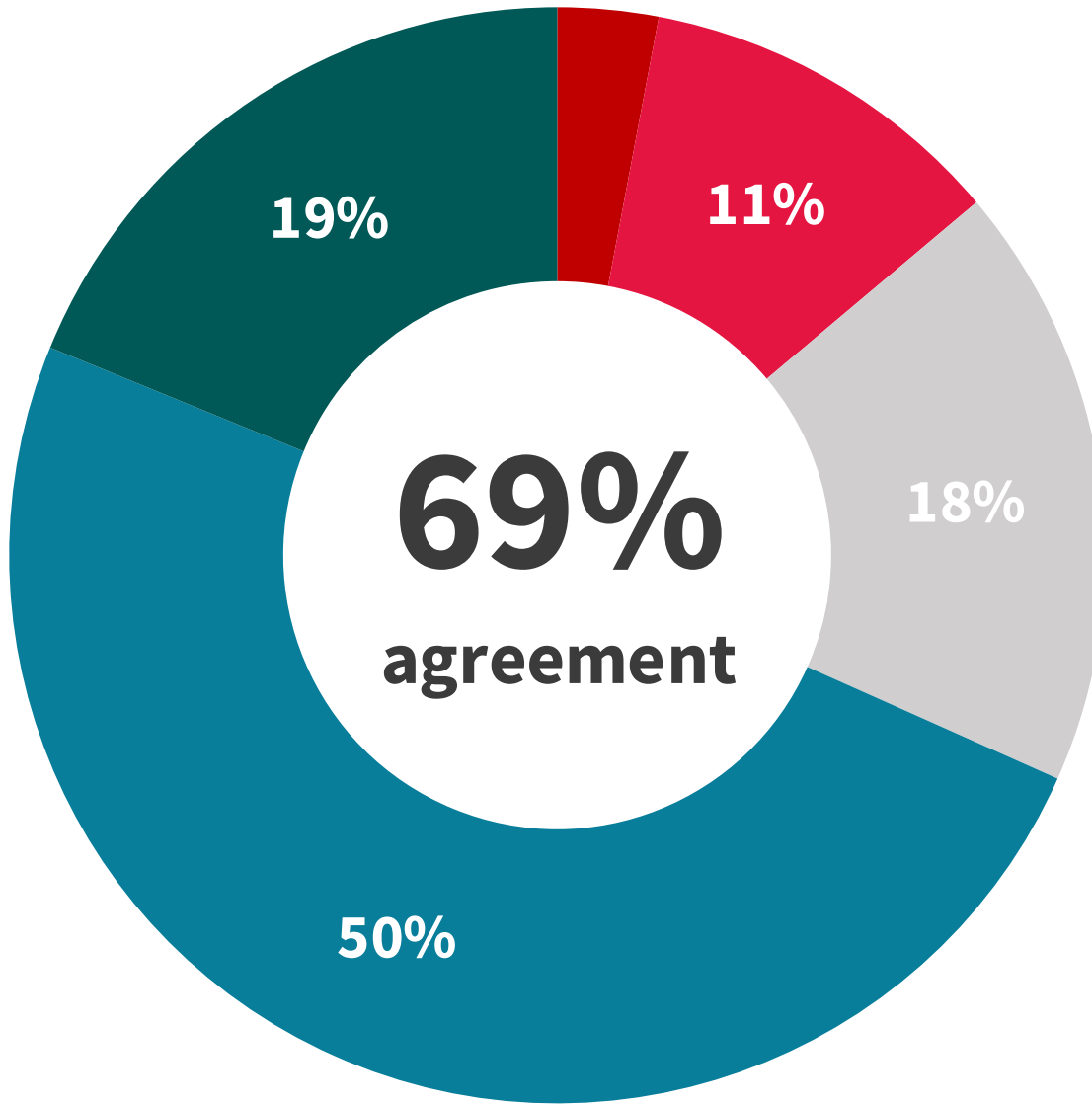
“Lower visa acceptance rates discourage some of the strongest potential students from applying, even when they are genuine and well-qualified.”



“Students with strong academic and financial profiles are more likely to choose alternative destinations with higher visa certainty.”



“Students who are confident of their visa success will continue to apply, and are not discouraged by increased rejection rates.”



Strongly Agree Agree Neither agree nor disagree Disagree Strongly Disagree

A photograph of three students sitting at a wooden table in a study area. A young man with curly hair and a mustache, wearing a white t-shirt, is smiling broadly. To his left, a young woman with glasses and dark hair is looking towards him. To his right, another young woman with long dark hair, wearing a striped shirt, is smiling and looking at him. The table is cluttered with study materials: several red notebooks, a floral-patterned cup, pens, pencils, and papers. One notebook has 'CORBETT COLLEGE' written on it. The background features a grey upholstered bench and a red wall with abstract white shapes.

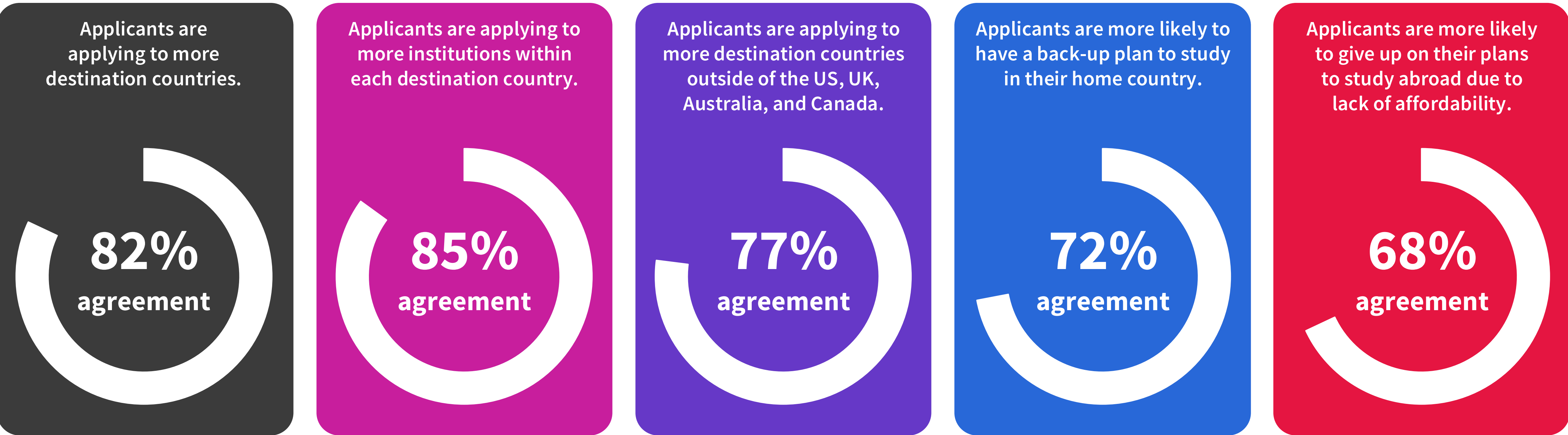
**Students are
widening and
hedging their
options, while also
having increased
needs for support**

Agents report more students are applying to destinations outside of the Big 4, and are also more likely to stay home

This is in addition to the now normal practice of applying to multiple destination countries and multiple institutions within each country

To what extent do you agree with the following statements, when considering current student behaviour compared to previous years?

% of Respondents that Agree/ Strongly Agree

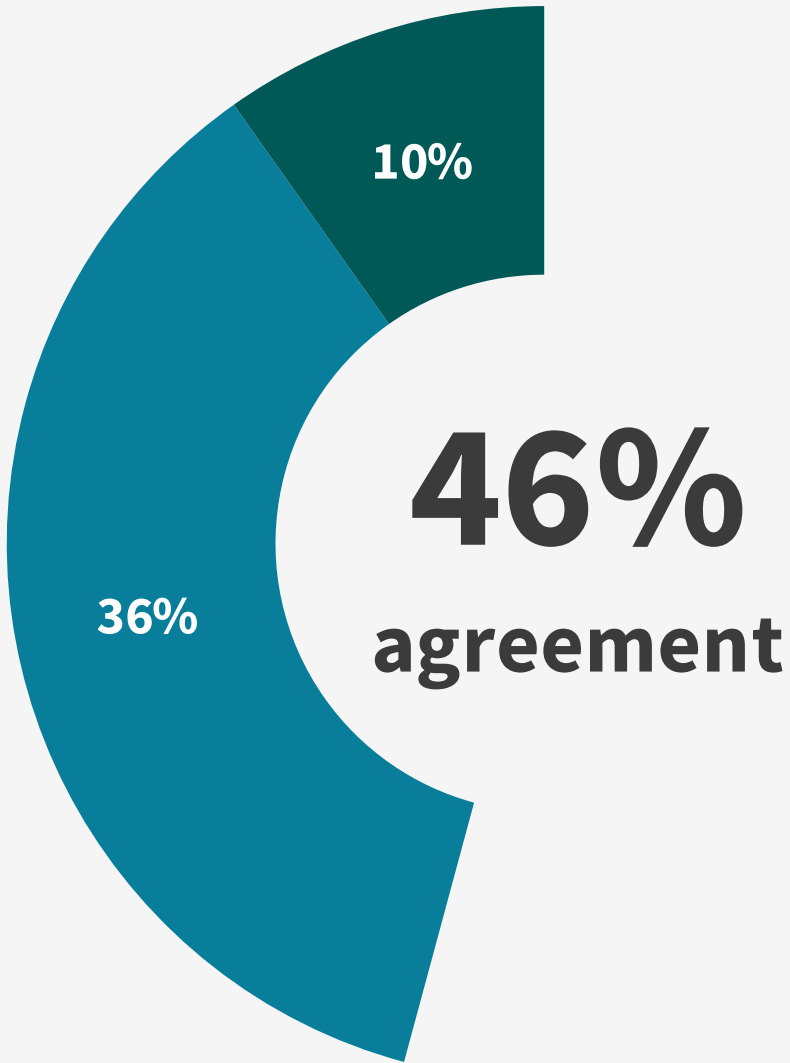


Home-country study is becoming a more credible alternative for some international students

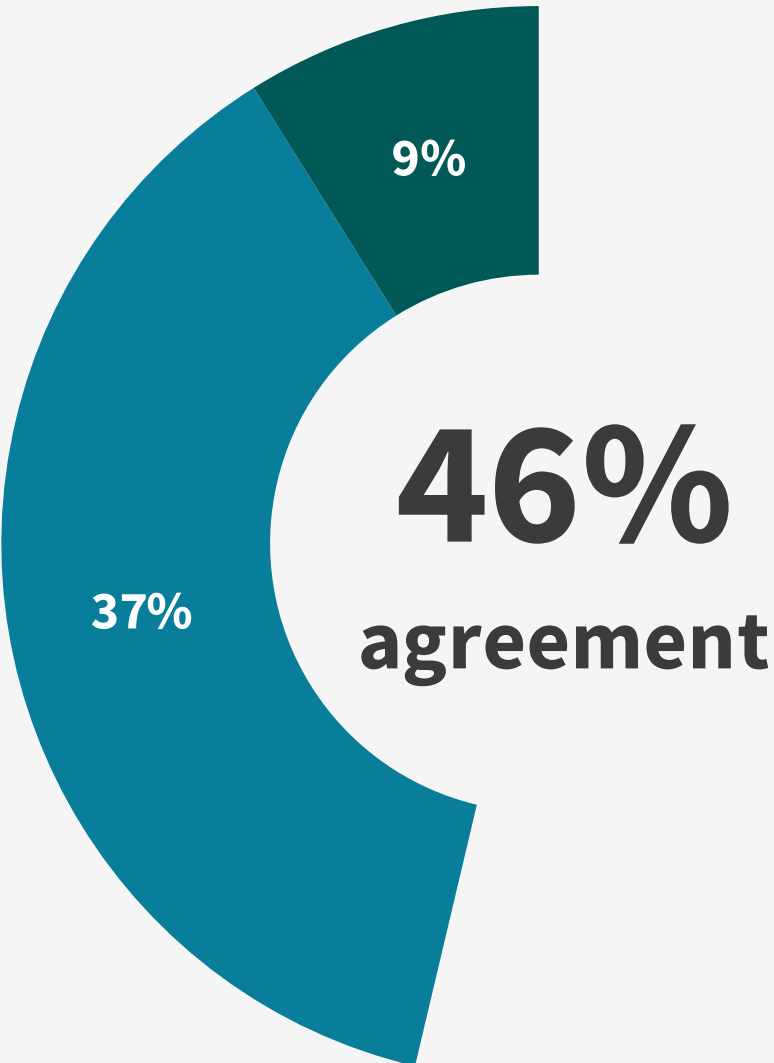
Students are influenced by affordability, family or personal commitments, and also visa difficulties

Q: To what extent do you agree with the following statements?

“Local universities in my country now provide a university education comparable to studying overseas.”

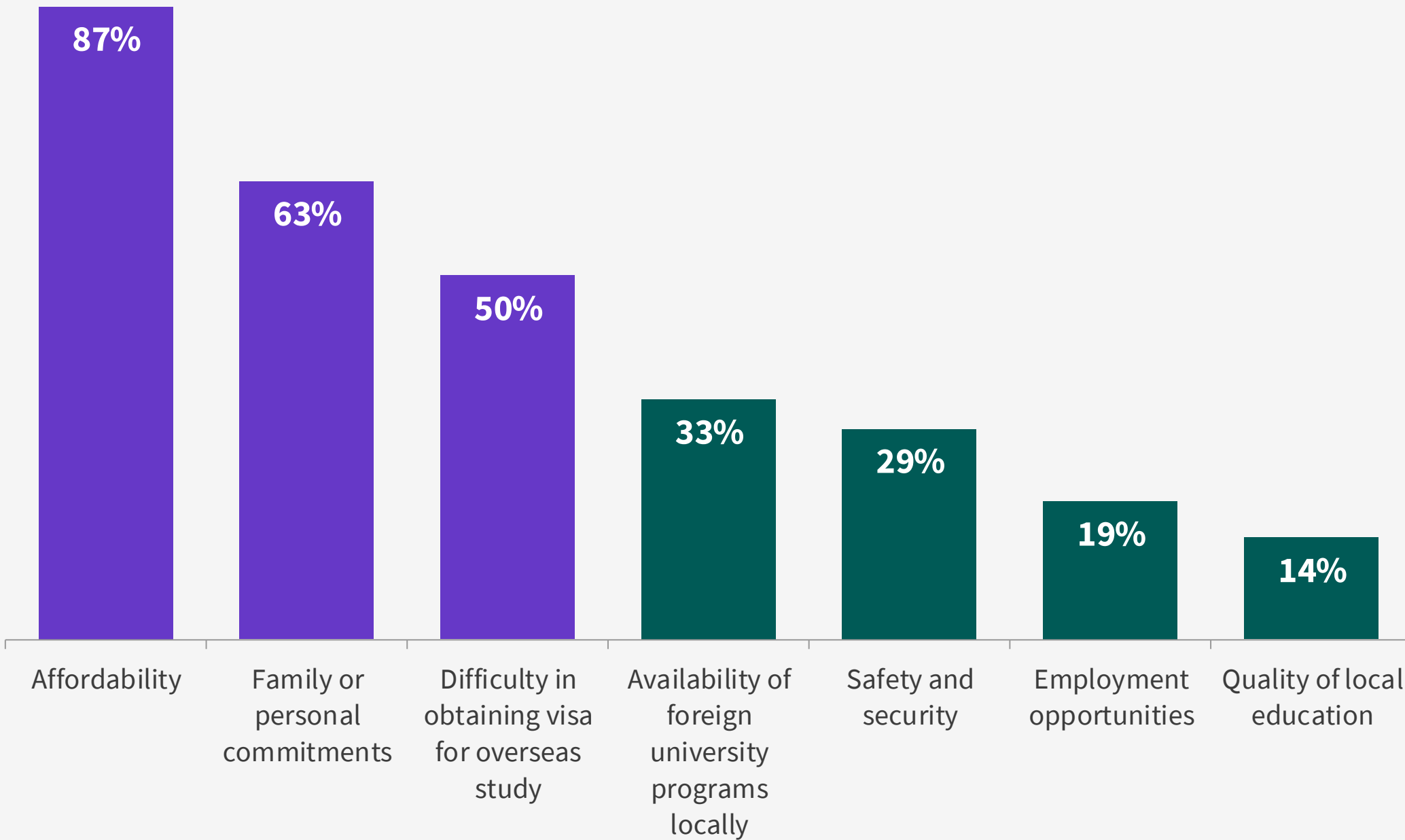


“Foreign university branch campuses in my country offer comparable academic quality to studying abroad.”



Strongly Agree Agree

Q: What are the most important factors for students choosing to stay in their home country to study rather than studying abroad?

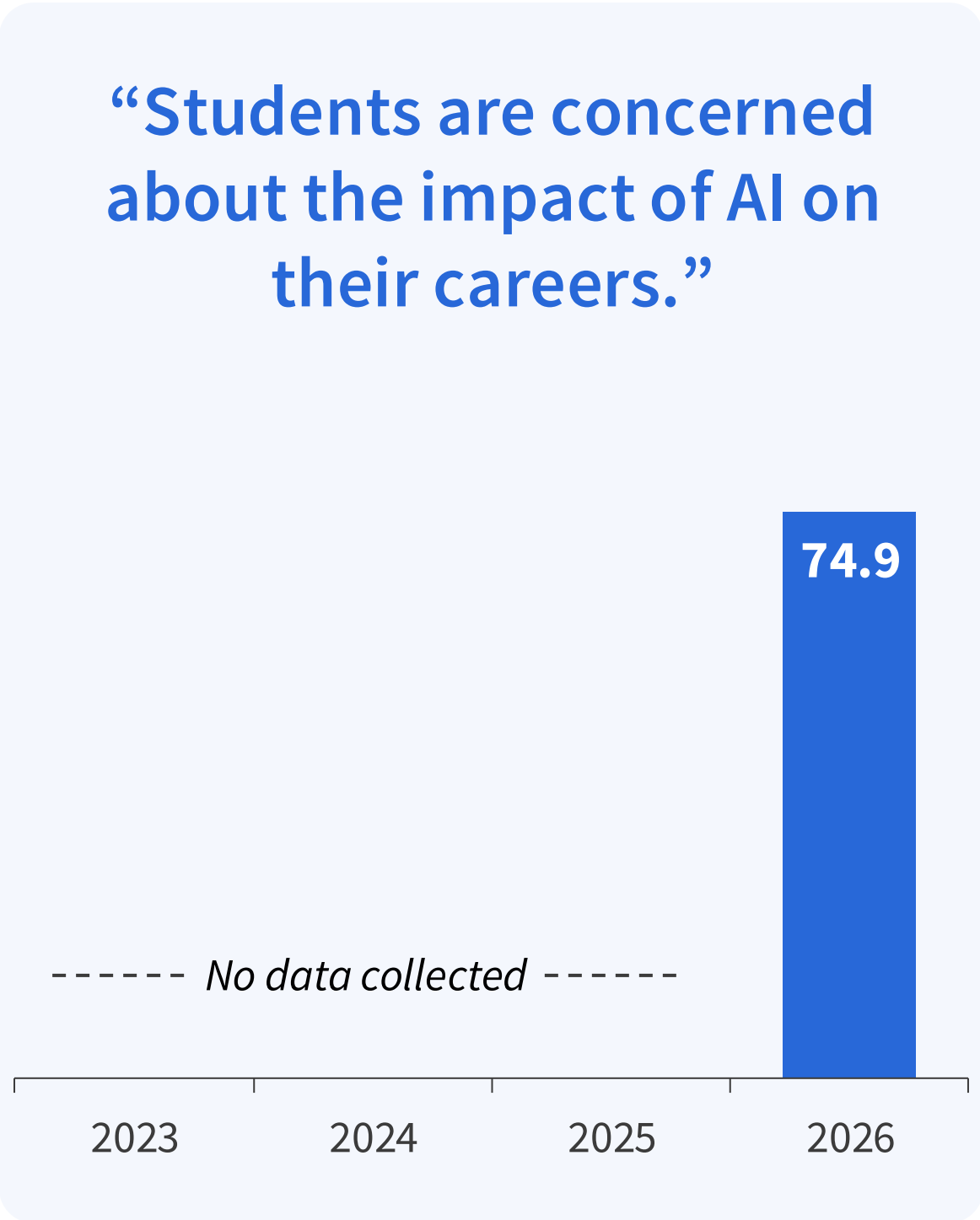
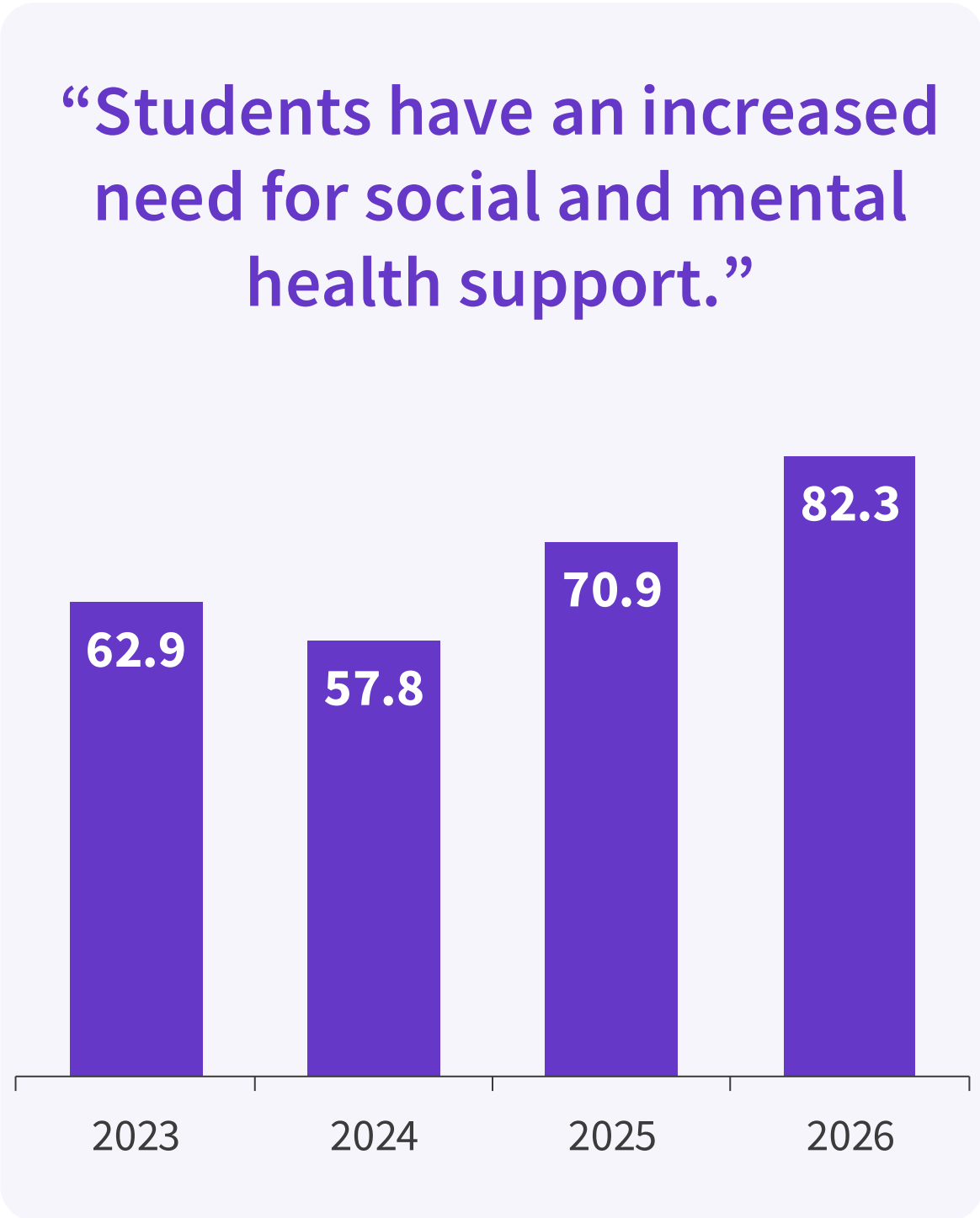
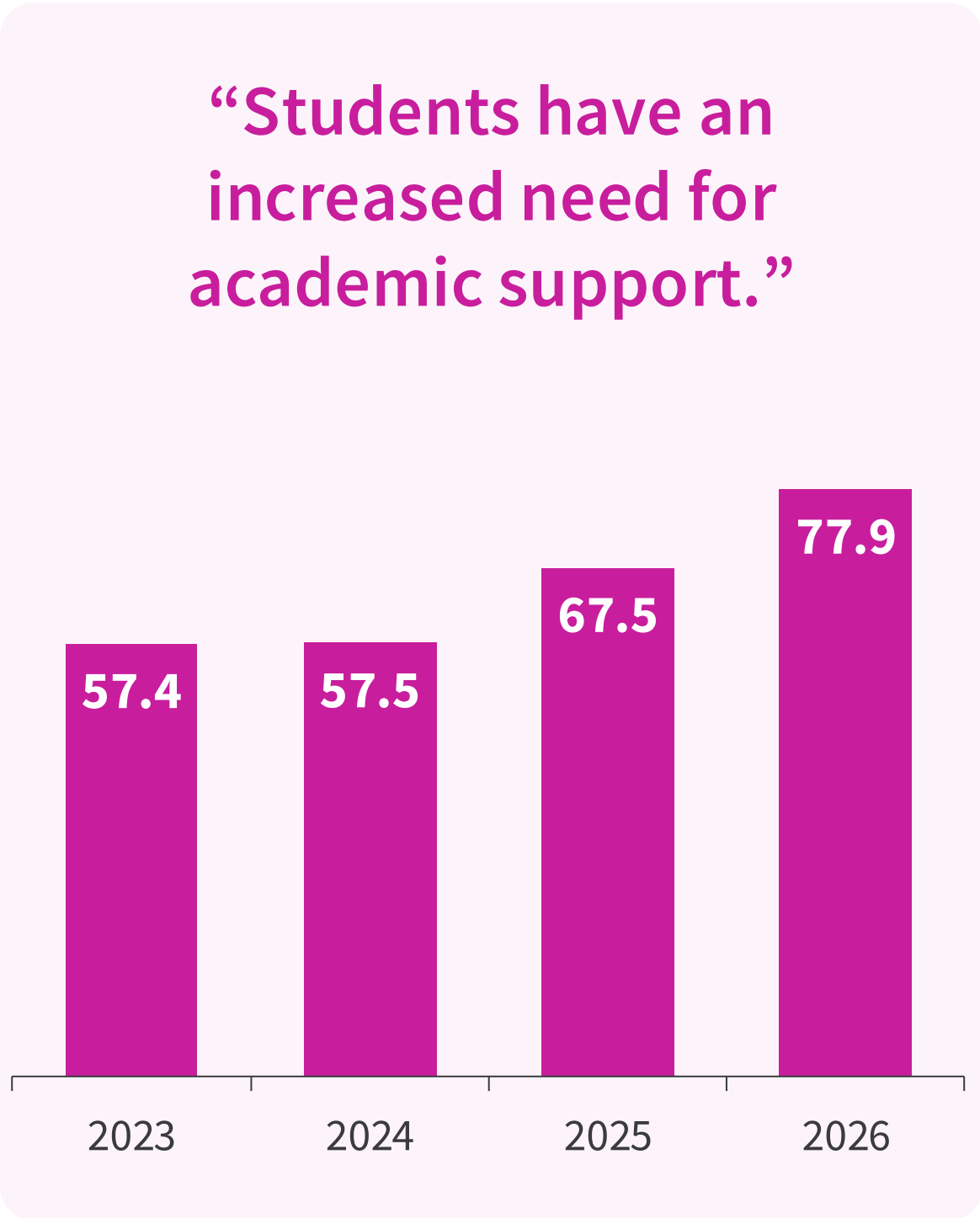
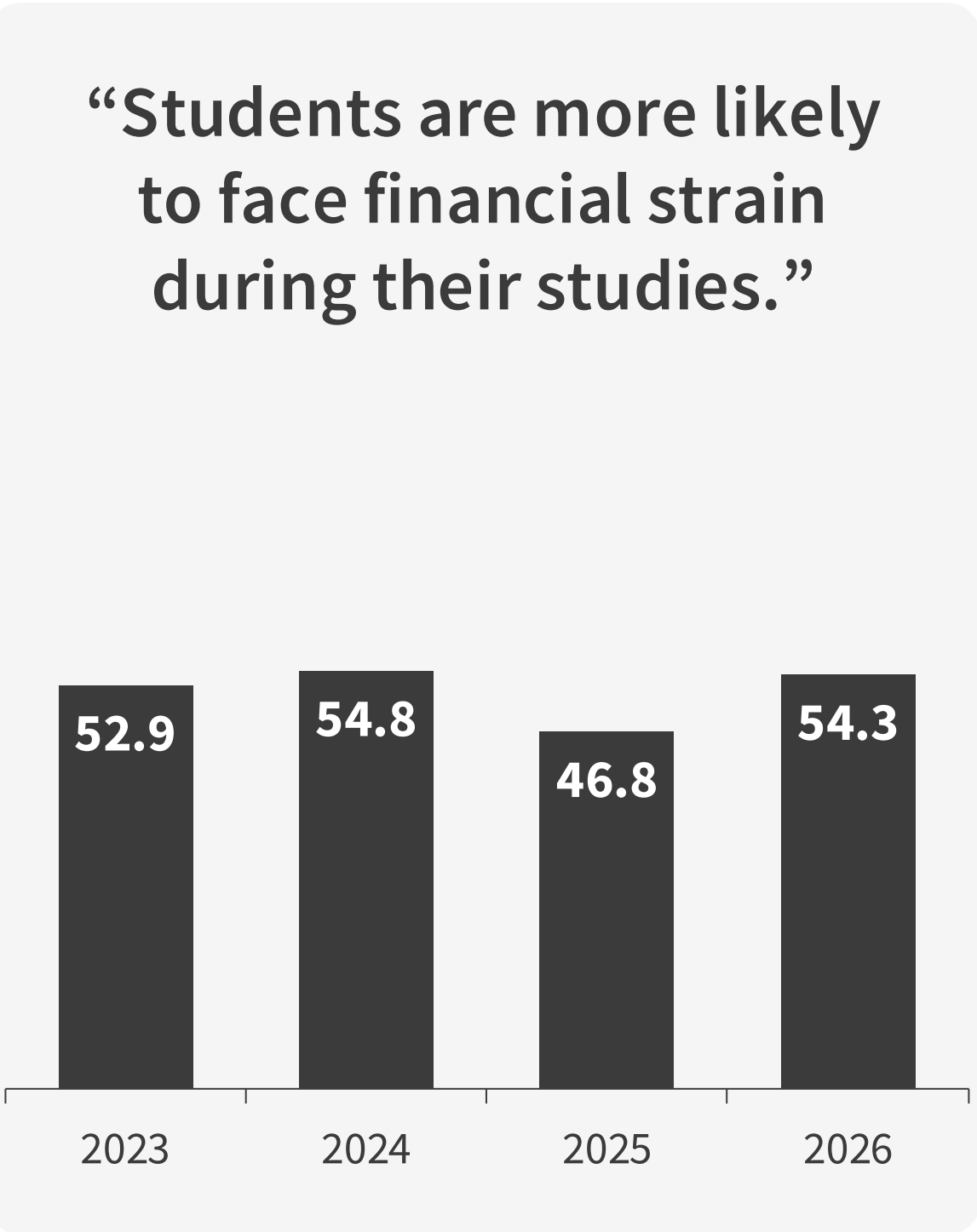


Agents report that students need more support

There has been a steady and recent sharp increase in reported needs for both academic support, and for social and mental health support. Students are also concerned about the impact of AI on their careers.

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 that Agree/ Strongly Agree



A photograph of three students walking on a rooftop terrace. A young man in a white shirt and khaki pants is walking towards the right. A young woman in a light green blazer and blue jeans is walking in the middle. Another young woman in a dark blue coat is walking towards the right, holding a tablet. In the background, other students are sitting on a bench. The sky is overcast.

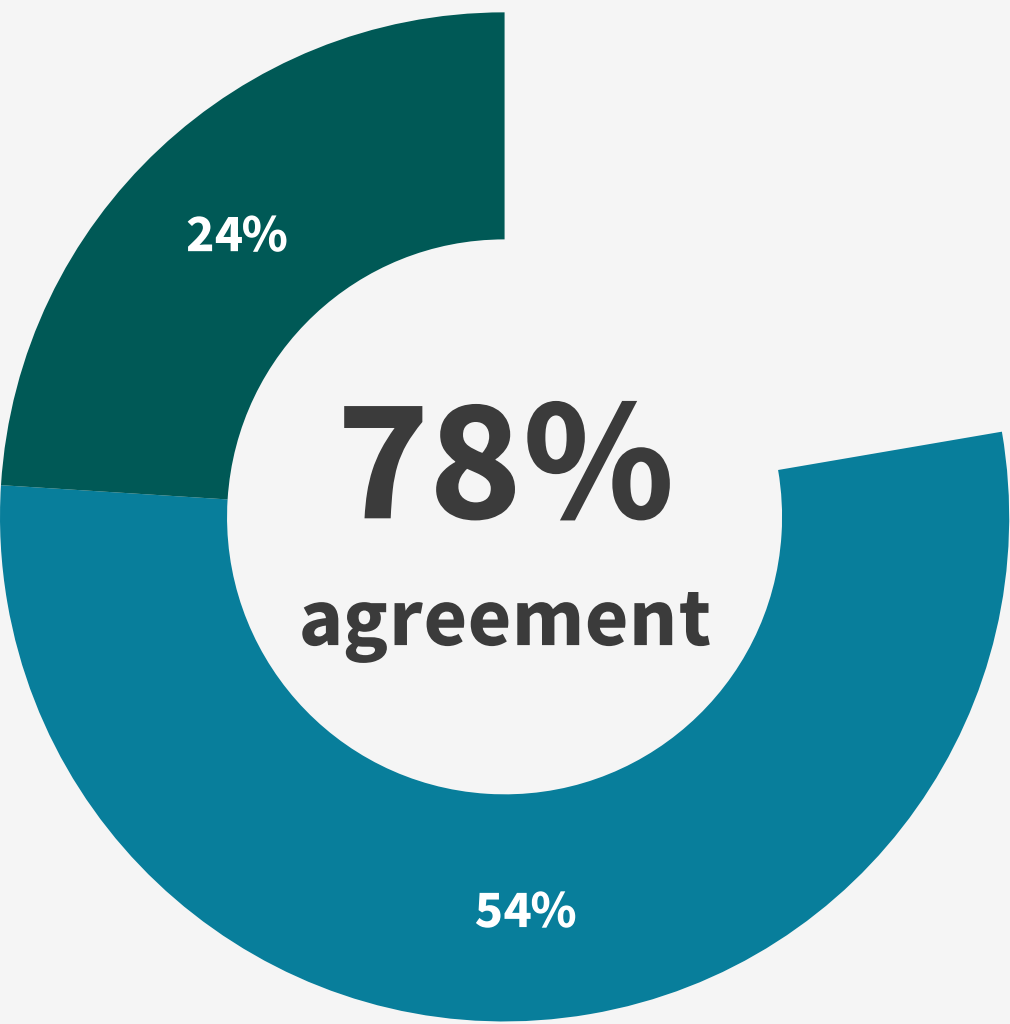
Agents remain central as AI reshapes student research behaviour

AI is changing search behaviour, but agents remain central to validation and advice

Agents increasingly being asked to validate AI-generated information

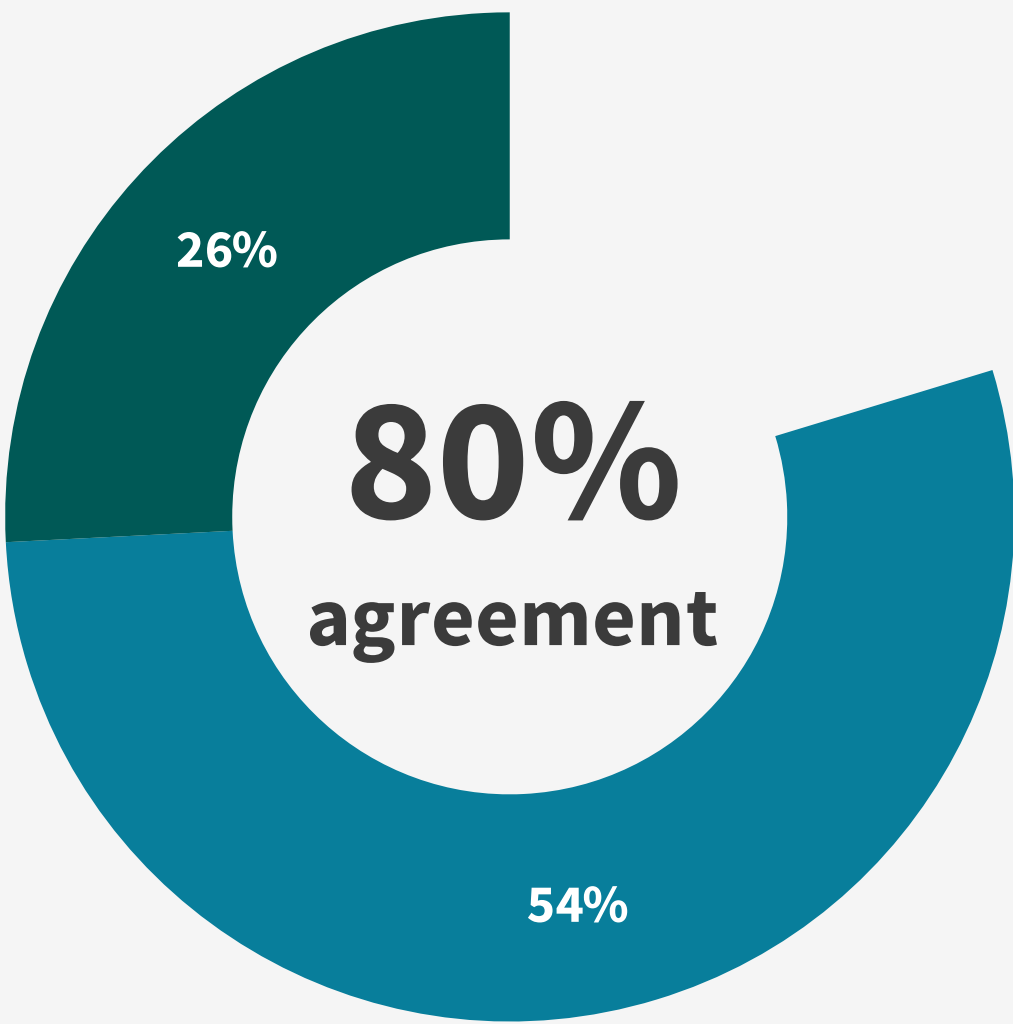
Q: Thinking about the past 12 months, to what extent do you agree or disagree with the following statements about how AI tools are affecting student engagement with agents?

Students are doing more independent research using AI before approaching an education agent.

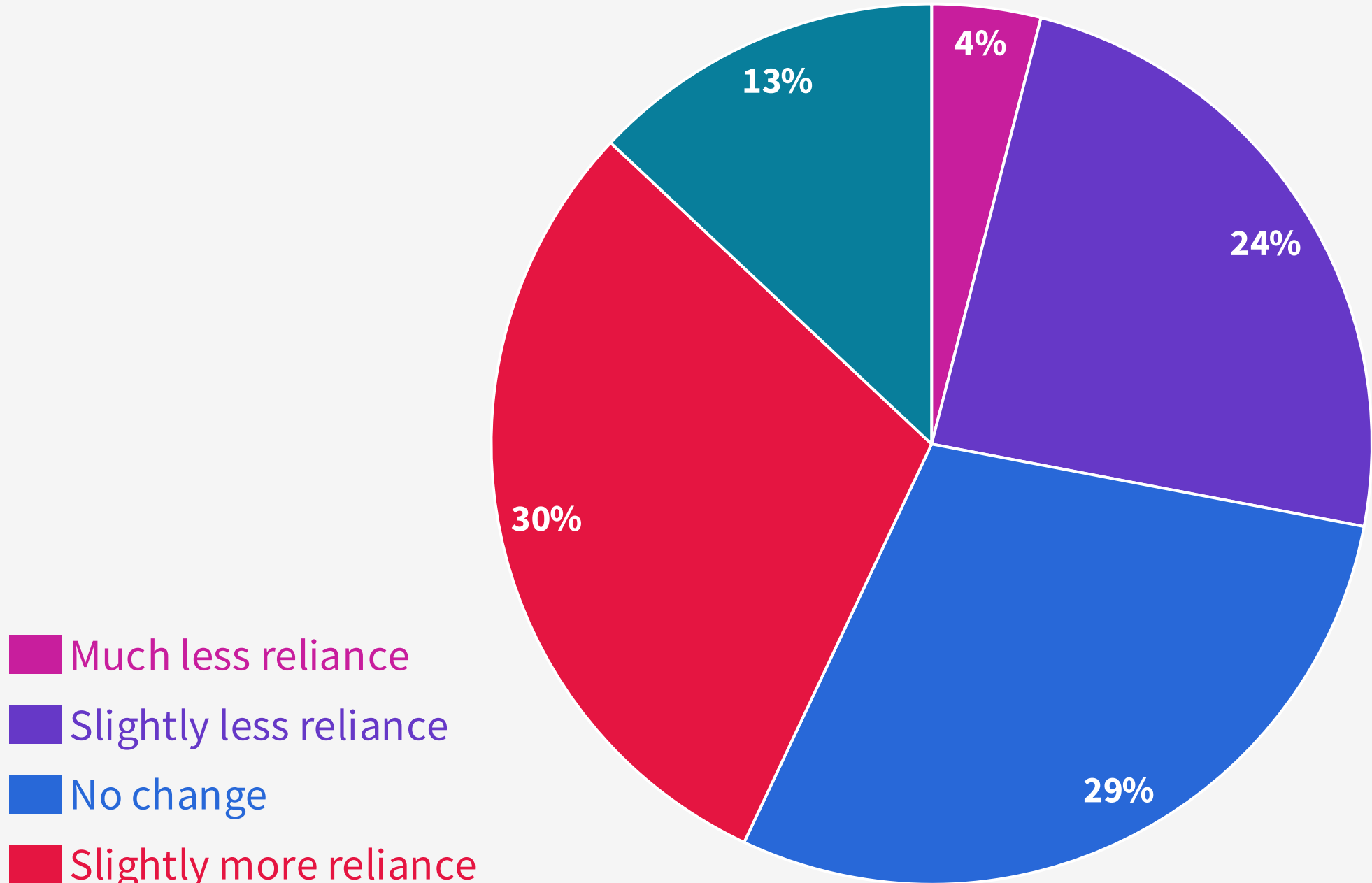


Strongly Agree Agree

Students still rely on education agents to validate or interpret information they find using AI.



Q: In your experience, have AI tools changed the way students engage with you as an agent?



Much less reliance
Slightly less reliance
No change
Slightly more reliance
Much more reliance

Please visit the Navitas website for
more detailed commentary and analysis

navitas.com/naps

Navitas (2026) Navitas Agent Perception Survey, Round 10 - May 2026.