



AAERI

Agent Perceptions Towards International Student Mobility

September 2023



About AAERI

The Association of Australian Education Representatives in India (AAERI) was formed in October 1996 to assure the integrity and credibility of agents who are recruiting students on behalf of Australian education and training institutions. The establishment of AAERI was an initiative of Australian Education International (AEI), although AAERI is an independent organisation, registered under the Societies Registration Act of India. The Association's main objectives are to:

- Act as a central force bringing together stakeholders involved in the Australian education industry.
- To regulate the Indian subcontinent market, in the interest of the Australian education brand, international students, and the Governments of India and Australia.
- Assure integrity and credibility of education agents who are recruiting students for Australian education providers.

About Acumen

Acumen is committed to helping globally-ambitious universities and broader education service providers enter, explore, and expand in South Asia, South East Asia, and beyond. Acumen offers a dedicated range of services to drive student recruitment and enrolment; develop strategic partnerships; and deliver consulting based on individual partner needs. As a result, Acumen acts as an extension of your brand, connecting you with students, unlocking strategic international education opportunities, understanding your ideal market through research and insights, and helping to mitigate risks along the way.

We have developed robust partnerships with stakeholders across the globe, including government agencies in Australia, Canada, India, Ireland and New Zealand, as well as US International Trade Administration, the US Department of Commerce and the UK Department of International Trade.

We operate in over 20 countries, with more than 250 industry practitioners with deep local knowledge and global expertise. We help our partners navigate a competitive education landscape from end to end, while always prioritising their success.



Survey Background

Agents and agent associations play a significant role in international student recruitment, often being the first point of contact for prospective students around the world. Agents provide cultural awareness and regional market intelligence that universities and students rely upon. It is imperative that agents and agent associations are aware of student mobility trends, key policies that impact education abroad, areas of concern in international recruitment, and opportunities for growth.

Acumen, part of Sannam S4 Group was engaged by AAERI to conduct a detailed survey of AAERI's network of self-regulated agents in India and Nepal, and of Australian university representatives based in India and Nepal. A total of 66 agents from India, 26 agents from Nepal, and 10 in-country university representatives participated in the online survey. Acumen also interviewed selected agents to gain a deeper understanding of the agent landscape in both countries. The survey covered agent experiences with, and expectations from, AAERI; emerging study abroad trends; knowledge gaps; opportunity areas; quality-enhancing measures; and challenges. The aim was to highlight the key areas of focus and improvement for institutions and AAERI members that would help to provide high-quality education experiences for their students and clients. The insights from the survey have been grouped in accordance with key themes – AAERI membership, Student Trends, Areas of Concern, and the Role of Immigration, Universities, and Agent Associations.



Key Findings of the Survey

■ The survey highlighted the value and importance of being associated with agent associations in order to create goodwill with universities and ensure ethical practices while processing student applications. Agents rely on such associations for networking, receipt of industry updates, and engaging with government bodies and policymakers to voice their concerns. AAERI provides regular knowledge sharing sessions with members while also encouraging them to follow the Code of Ethical Practices (COEP), which is based on the Australian Government's Education Services for Overseas Students Act (ESOS Act).

■ Rising interest from students seeking to study abroad, primarily driven by post-study work benefits and future migration prospects, has led agents to offer online counselling. However, most agents continue to feel that face-to-face interactions are more effective in assessing the legitimacy of students.

■ **Nearly 66%** of agents surveyed stated that they work with other agents, and that this was through sub-agents seeking access to education providers with whom they do not already have an agreement.

■ With increasing application numbers, **90% of agents** stated misrepresentation of student information to be a serious concern, primarily in the area of fake documentation (educational, English proficiency, and financial).

■ **Over 70%** of agents highlighted the lack of financial credibility and uncertain knowledge of the intended destination / purpose for study as key signs that helps them to determine non-genuine students. This is typically ascertained via face-to-face discussions, further emphasizing the need for traditional counselling methods.

■ It was also suggested that universities can support agents in reducing cases of misrepresentation of student information, by conducting relevant and regular training sessions and having a clear GTE / screening process.

AAERI Membership

AAERI presently has 116 members in India and 41 members in Nepal. Membership to AAERI is open to all agents, subject to meeting certain requirements. The survey found that many member agents who are part of AAERI are also active members of ICEF and The American International Recruitment Council (AIRC), indicating the importance of association membership. NAFSA, Association of International Educators and Education Consultancy Association of Nepal (ECAN) are also popular among agents in India and Nepal. The Australian university in-country representatives also indicated the importance of AAERI membership, with over 70% stating that they recommend AAERI membership to their agents.

Most AAERI members in India recruit students from, in order of volume, the northern part of the country (Delhi, Punjab, and Haryana), followed by the southern (Andhra Pradesh, Telangana, Kerala, Tamil Nadu) and the western regions. In Nepal, most student recruitment activity from agents is from Kathmandu, Chitwan, and Pokhara.

For most agents (~80%), the primary expectations from agent associations are to have regular networking events and opportunities to gain information and updates on changes in education policies and regulations. Surprisingly, advocacy and representation for education consultants, which was among the top expectations from agents in India (92%) as well as Australian in-country university representatives, was a low priority in Nepal, where agents sought access to industry-specific training and workshops and professional development opportunities for staff as a priority.

That said, agents from both regions had similar expectations in terms of AAERI's future activities i.e. engaging with government bodies and policymakers to shape education policies (over 85%), enhancing the professional standards of education consultants (over 70%), and conducting research and analysis on industry trends (over 65%). For in-country university representatives, the key areas for AAERI to focus on were enhancing the professional standards of education consultants and monitoring compliance and good practice by association members.

Student Trends

Based on the survey, it was found that the majority of agents presently recruit students via both online and traditional face-to-face counselling. This may be a result of the scale of operations across the two countries as well as the COVID-19-induced adaptability of online methods. In India, however, nearly one-third of agents continue to only opt for face-to-face counselling for student recruitment, as opposed to just **12% in Nepal**. The difference may also be influenced by students in different regions across India having a preference for different approaches to counselling.

While online counselling has grown, the majority of agents and in-country university representatives feel that it is not as effective as face-to-face counselling, indicating the continued effectiveness of in-person conversations with students to determine their intentions with regard to studying abroad.

Nearly all agents from India and Nepal, as well as in-country university representatives, stated that they are witnessing a rising interest in students seeking to study abroad, with extended post-study work benefits and potential employability being the primary driving factors (over 90%). Tuition fees and reviews from family, friends, and peer groups were the other key decision drivers for students to study abroad. Interestingly, potential future migration, which ranked high as a key driver for Indian students seeking to study abroad, ranked low in the case of Nepalese students.

In terms of the study destinations, **over 80%** of the agents claimed Australia, Canada, the US, and the UK to be the top preferences for students from both India and Nepal.

Within Australia, Victoria, New South Wales, and Western Australia continue to be the top student choices, led by the availability of highly reputed universities in the states as well as their vibrant multicultural society and large presence of the Indian diaspora, high quality of living, and social inclusion.

While students are motivated to pursue higher education in Australia, there are a few areas of concern and challenges that they face during their study abroad journey. **Nearly 80%** of agents surveyed stated that the uncertainty regarding visa outcomes and the opaque process was the primary challenge faced by agents / students during their preparations for studying abroad in Australia. Delayed visas or COEs and the absence of consistent processes among Australian universities are among the other top challenges faced by students and agents, according to respondents.

Student poaching and misinformation regarding the change of courses and providers, without communicating the long-term implications prior to the students onshore, is also an area of concern for agents, universities, and their students. To avoid cases of student poaching, most agents surveyed felt that a mandate for new visas in case of a change in course/ provider, irrespective of the level of study, would be beneficial.

Having a Student Support Group (SSG), campus-wide or for students from specific countries, can help address these concerns prior to students arriving onshore and help create a welcoming environment in Australia.

Nearly two-thirds of all AAERI agents surveyed stated that they work with other agents / sub-agents to access education providers that they don't have an agreement with. There is, however, a stark difference between Indian and Nepalese agent responses towards receiving student references via sub-agents / partners. While **53%** of agents in India do not receive student referrals from sub-agents, a significant **84%** of agents in Nepal receive such referrals, based on the survey.

The agents surveyed highlighted the following points / recommendations for working with sub-agents:

- There is a resounding need for regulations regarding the use of sub-agents for student acquisition, and the need for greater clarity on the use of sub-agents, in accordance with the ESOS Act and the National Code.
- All sub-agents being leveraged for student recruitment should be declared to the universities; while sub-agents may help in lead generation, all other student services such as admissions processing, GTE assessment, and lodgement of appropriate student visas must be the responsibility of the principal agent.
- If the sub-agent's role extends beyond lead generation, then the sub-agents must be trained and educated by the principal agent, and their details should be listed on the principal agent's website.

Areas of Concern – Student Misrepresentation of Information

The rapid growth of students seeking education and migration abroad has led to a rise in the cases of misrepresentation of information, with **nearly 90%** of agents surveyed stating it to be a serious concern. Irregularities in documents (educational, financial, and work experience) are the primary concern.

Complex and non-consistent guidelines for Statement of Purpose (SOP) were found to be a key concern for students and agents, with agents also feeling that an SOP cannot serve as an intent for future years. It was suggested that a cover letter be utilised to explain students' existing situation, as long as they meet the other eligibility criteria. Misrepresentation of English language proficiency and package programs were also highlighted as key forms of misrepresentation.

In order to avoid such scenarios, it is imperative to assess early warning signs of students' providing fraudulent information. The survey found that **over 70%** of agents feel that when students have no intention of meeting agents in-person or virtually this is the first sign of a non-genuine student. Further, agents being well aware of all regulations, including the Technical and Further Education (TAFE) regulations, can also help verify the authenticity of prospective students. **AAERI** members also felt that Australian TAFE providers must be better promoted to students seeking technical-level vocational, trade, or professional qualifications.

When asked about best practices to avoid cases of misrepresentation of information from students, most agents stated face-to-face detailed discussion to be the best option.



Other key practices suggested include:

- A standard GTE process to be implemented by education providers for all agents.
- Compulsory in-person or virtual interviews from the university and qualified agents; if a university contract allows the use of sub-agents, all such sub-agents must be declared to the universities.
- Ensuring academic competence and financial capability during/ prior to credibility interviews.
- Educational, financial, and work experience documents should be verified using Digi locker/ UDAI registration and websites/physical verification methods, inquiry with banks, and employers.
- Working with the tenured and well-reputed agents; generating awareness about the presence of AAERI members who follow the code of ethics.
- Providers and agents should be responsible for ensuring students have pre-departure details on all aspects of the study abroad journey.

Role of Government, Universities, and Associations

Government visa agencies (such as the Department of Home Affairs), universities, and agent associations have a significant impact on student choice for studying abroad. Based on this survey it was found that, according to respondents, the lack of transparency in decision-making, frequent changes in immigration policies, and lengthy and complex GTE checks and visa application procedures were the key challenges faced by agents while processing student applications.

- According to AAERI agents, while the turnaround time of most visa applications that are believed to be complete and correct in India averages 15-30 days, in Nepal, it stands at 8-14 days.

Nearly two-thirds of the agents surveyed felt that education providers could do more to help address misrepresentation and enhance the quality of recruitment. **80%** of the agents stated having a reasonable GTE / screening process as the leading way in which Australian universities can support agents, followed by faster offer / COE turnaround. Clarity and consistency in reviewing agent performance and agreement renewals were also highlighted as key areas where universities can provide support. It was also felt that the process of agent performance should be focussed on the quality of students recruited, over the quantity of students.

Conducting regular training and workshops and providing access to accurate and updated information for agents and prospective students continues to be an important area where agents seek university support, with **over 95%** of the agents surveyed stating that specific training / certification to identify and combat misrepresentation would be beneficial.

AAERI presently provides Peer Certification courses at discounted prices to all its members. It also offers the International Education Partners Refresher Course, which is a free, online, industry-recommended course that provides agents with information about the Australian education system and Australia as a study destination. The course has had over **350 counsellors** enrolled in this program over the period of 8 weeks.

AAERI agents also feel that the Australian Government website, Study in Australia www.studyaustralia.gov.au needs to be promoted further, highlighting the world-class qualifications, extended post-study work benefits, and financial aid/scholarships for international students. AAERI agents also feel that Australian universities should offer more scholarships to students with high academic records to attract students.

In August 2023, Australia restricted international students from changing providers shortly after arriving in the country in an effort to avoid onshore student poaching and hampering their study journey. The majority of agents across India and Nepal are either somewhat or very hopeful that this move, in addition to the further reforms announced in October 2023, will help to reduce the cases of student misrepresentation.

Nearly 40% of the agents feel there is scope for more reforms, such as:

- Linking visas to institutions with university specific visa labelling (as practised in Canada and New Zealand).
- Regulations to avoid onshore poaching of international students between providers.
- The Confirmation of Enrolment (CoE) in PRISMS must have the name of the agents.

The need to obtain a new visa if a student changes course, no transfers within the first 12 months of study abroad, and a ban on commission for onshore movements within the first 12 months were proposed as key regulations that would help restrict onshore poaching of students and promote student retention.

According to in-country university representatives surveyed, better student support and orientation planning are key measures being taken to promote student retention, followed by performance bonuses to agents with good retention and contract cancellation for those without good retention.

Areas of Future Focus

Based on suggestions and feedback collected from AAERI agents across India and Nepal, as well as in-country Australian university representatives, the following points outline the areas that AAERI's future discussions and initiatives could focus on:

- Provision of regular training, networking events, and webinars (updates from DHA) in different regions to make the association more inclusive; recordings of such events could be made available to members.
- Protection of AAERI members from unwanted and unwarranted scrutiny due to attrition.
- Provision of a Complaint Management Policy for universities, departments, agents, and students.
- Requirement that members are contracted by the universities and should submit the list of universities with whom they work. This submission should match the information on the university website. If an agent loses a contract, the university should advise if the cancellation is due to fraud or otherwise.
- AAERI can provide platforms for Australian universities seeking new recruitment partners and facilitate networking events for universities and agents to discuss agent appointment initiatives. AAERI can also provide an online platform where members and staff can participate in forums and have the opportunity to market their products and services.

- AAERI, in partnership with Austrade, conducting campaigns to promote Australia as a study destination and to support finding credible agents.
- To ensure accountability of members and self-regulation in AAERI, universities should work more closely with the AAERI members. This focus would be to avoid situations where agents are not conducting proper student checks; applications are sent to a large number of providers; and there is poor presentation of student applications / documents.
- **100%** of in-country university representatives think AAERI should spend more time on member training, with **70%** of the university representatives stating that they would support AAERI in conducting development workshops and:
 - Agent training – share the best practices and prevailing sources from where checks and verifications can be done. Regularly updating on prevailing concerns and issues.
 - Genuine student screening process – assessing students' intentions and ability to study overseas, financial verifications, and setting expectations on what is required of students seeking to study in Australia.
 - GTE documentation and ideal course selection strategies for the potential students.
- AAERI agents feel that there is a rise in the 'fly-by-night' rogue operators, who pose as education agents and charge non-refundable and upfront payment from students for all the services, which include academic tampering.
 - It was also stated that students with weak academic credentials and low English proficiency were often targeted by such agents.



Participating Agents

India

AB EDUCATIONAL AVENUES PVT LTD.
ABE SERVICES
ADEPT OVERSEAS EDUCATION
AECC INDIA PVT LTD
ASCENT CONSULTING ABROAD STUDIES LLP
ATLAS CONSULTANTS
AUSNZ EDUCATION PVT LTD
AXIS INTERNATIONAL EDUCATION CONSULTANT
BITTRACK CONSULTANTS PVT LTD
BLUE SKY IMMIGRATION
CAMBRIDGE EDUCATIONAL SERVICES PVT LTD
CAN ABLE IMMIGRATION CONSULTANTS
CANAM UNISEARCH
CHETANYA CAREER CONSULTANTS PVT LTD.
COMPETITIVE CAREERS PRIVATE LTD
CONNECT OVERSEAS
DILLINGER CONSULTANTS
DISCOVER MATRIX PRIVATE LTD.
DIVYA JOSEPHS CONSULTING GROUP PVT LTD.
DUCK OVERSEAS CONSULTANTS
EDU PLANET
EDUCATION OVERSEAS ACADEMY
EDUCATION WORLD
EDWISE INTERNATIONAL
ESPIRE EDUCATION PVT LTD
G.K. EDUCATIONAL CONSULTANTS PVT LTD.
GLOBAL IMMIGRATION CONSULTANCY INC.
GLOBAL REACH
HOC OVERSEAS CONSULTANTS
HORIZON OVERSEAS STUDIES (P) LTD
IAEC CONSULTANTS PVT LTD.
BGS – BAWA GLOBAL SYNERGY

IEC CONSULTANTS
JUPITER STUDY ABROAD CONSULTANTS PVT LTD.
KANGAROO STUDIES PVT LTD
KUMAR MARKETING SERVICES
MWT EDUCATION CONSULTANCY PVT LTD.
NAIPUNNYA INTERNATIONAL
NAVIGATORS OVERSEAS SOLUTIONS PVT LTD.
NEPTUNE EDUCATIONAL CONSULTANTS
NEW EDGE OVERSEAS CONSULTANTS PVT LTD.
OXFORD TRAVEL & EDUCATIONAL SERVICES
PAC ASIA SERVICES PVT LTD
PLANET EDUCATION
PRECIOUS EDUCATION CONSULTANT
SAAR CAREER CONSULTANCY PVT LTD
SARC (EDUSARC CONSULTANCY PVT LIMITED)
SIEC EDUCATION PRIVATE LIMITED
SOPHIYA CONSULTANTS
SOUTHERN SEAS EDUCATION
STORM EDUCATION GROUP PVT LTD.
TAKE OFF EDUCATIONAL CONSULTANTS
TOUCHSTONE EDUCATIONAL
TRANS GLOBE EDUCATION
TURNING POINT STUDIES CONSULTANTS PVT LTD.
V AND U INTELLECT CONSULTANTS
VALMIKI EDUCATION, HYDERABAD
VELOX OVERSEAS EDUCATION
VGC INTERNATIONAL
VICTORIA CONSULTANTS
VICTORIA EDUCATIONAL CONSULTANTS
WEST HIGHLANDER
WESTERN OVERSEAS STUDY ABROAD PVT LTD
OASIS IMMIGRATION AND EDUCATIONAL
CONSULTANTS PVT LTD.


Nepal

A ONE GLOBAL CONSULTANTS PVT. LTD.
AE GLOBAL EDUCATION CONSULTANCY
AIP EDUCATION
ALFA BETA INSTITUTE
APACE INTERNATIONAL INSTITUTE
BOOMERANG INTERNATIONAL EDUCATIONAL SEVICES (BIES)
EDUCATION TREE GLOBAL
EXCEL EDUCATION
GATEWAY GLOBAL STUDY
GLOBAL VISA ADVISOR EDUCATION CONSULTANC PVT. LTD.
KANGAROO EDUCATION FOUNDATION
KATHMANDU INFOSYS EDUCATIONAL CONSULTANCY (KIEC)
KTM CONSULTING GROUP
NEPCOMS SERVICES
NETCO TECHNOLOGY (NETCOTEC) PVT.LTD
NIRVANA COUNSELING CENTRE
NORTH EASTERNS EDUCATIONAL CONSULTANCY PVT LTD
NOVA EDUCATION AND CONSULTING SERVICES
OEVS
PRANJAL EDUCATION CONSULTANCY
SONYA INTERNATIONAL EDUCATION AND CAREERS (SIEC)
STUDYLANE INTERNATIONAL
VITO EDUCATION
YORK INTERNATIONAL EDUCATION CONSULTANCY

UNIVERSITY REPRESENTATIVES

AUSTRALIAN NATIONAL UNIVERSITY
BOND UNIVERSITY
JAMES COOK UNIVERSITY
LA TROBE UNIVERSITY
MACQUARIE UNIVERSITY

MONASH UNIVERSITY
SWINBURNE UNIVERSITY OF TECHNOLOGY
UNIVERSITY OF CANBERRA
UNIVERSITY OF SOUTH AUSTRALIA
UNIVERSITY OF TASMANIA



This independent survey and report
was collated by **Acumen**
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