

RESEARCH

# IMPACTS OF COVID-19 ON THE INTERNATIONAL EDUCATION MARKET

2021

## Research Team

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# 2021

## Impacts of COVID-19 on the International Education Market



### Overview

 Methodology

 Dashboards

 COVID-19

 Detailing

### SCENARIOS

1. FULLY PRESENTIAL
2. PREVIOUS QUARANTINE
3. HYBRID
4. REDUCED HOURS
5. ONLINE IN THE HOME COUNTRY

### NORMALITY

- o **AGENTS:**  
only in 2023
- o **STUDENTS:**  
possible in 2022

### REFERENCES



Canada



New Zealand



USA



UK

### Countries of interest



Canada



USA



UK



New Zealand



Australia



Ireland



France



Netherlands

### Key Factors

Payment conditions,  
confidence in the international  
education program,  
recognition of the agency  
weigh more heavily in the  
student's decision.

## Methodology

**TYPE OF RESEARCH:**  
quantitative

**TARGET AUDIENCE:**  
students and managers of education agencies, franchisees, supervisors, managers, owners or representatives of brands

**SAMPLE:**  
512 branches (Agents) e 1034 students

**TOOL FOR DATA COLLECTION:**  
online questionnaire

**STRATEGY FOR DATA COLLECTION:**  
Invitations sent by e-mail, phone and social media

**TIME SPAN:**  
August and September 2021

**EXTENT:**  
Brazil and Latin America

**LISTING:**  
Supplied by Belta, Education NZ and partners



Latin America

**THINK  
NEW**



NEW ZEALAND  
EDUCATION

**Mobilidade Acadêmica**

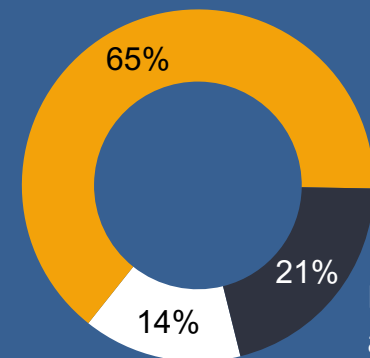
a vivência acadêmica internacional

## COVID-19



## Agents

Managers of an agency network



Franchisees

Managers of an agency

## Students

**24%**

with face-to-face attendance

**39%** only with online attendance

## Impact

**49%**

of students postponed their study travel for financial reasons

**10%**

definitely gave up

**25%**

continues with the same plan as before

**92%**

of agents indicated negative impact of COVID

**-46%**

average impact of COVID-19 on sales

Students are more optimistic than agents. Brazilians are among the most pessimistic about the effects of the pandemic.

## Students

**61%**









have an income of up to 4 minimum wages.

**50%**

are fully vaccinated

**23%** had COVID-19

# Impact of COVID-19 on the sale of products and services (compared to pre-pandemic)

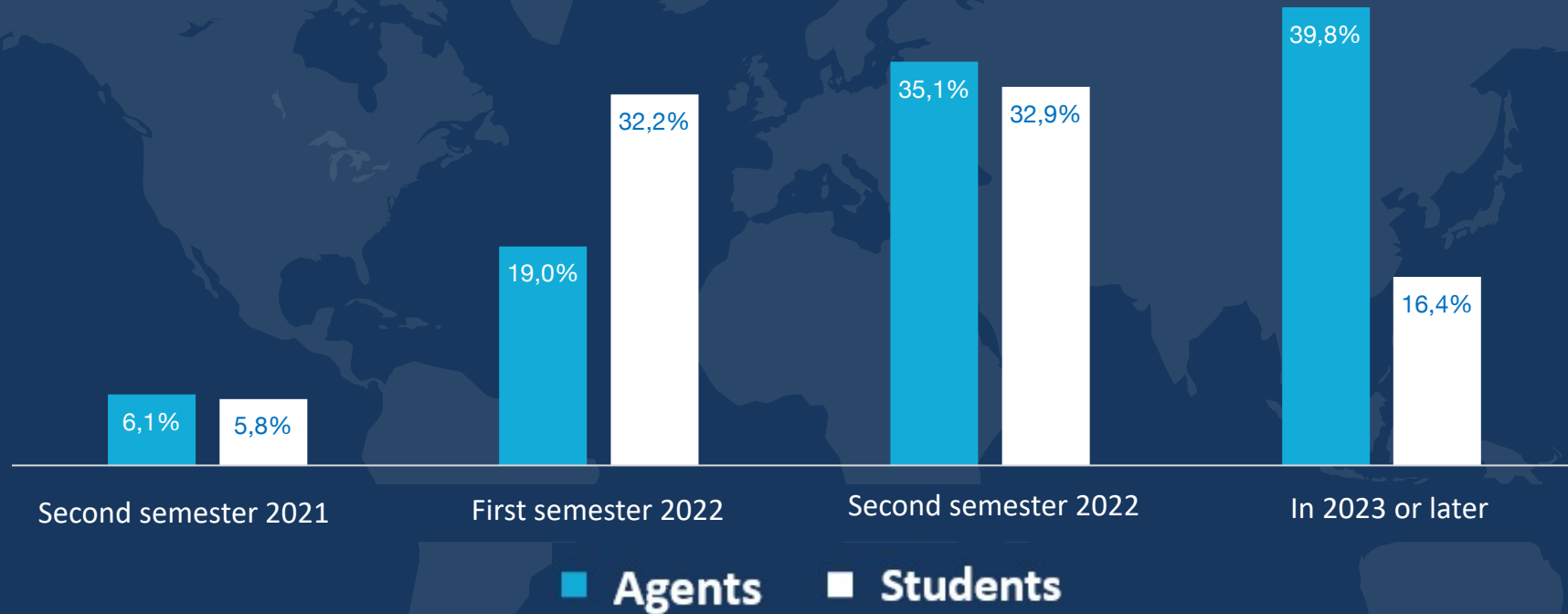
		 Latin America	 Brazil	 Chile	 Colombia	 Mexico
Impacted Negatively 		91,8%	90,2%	97,3%	82,6%	96,9%
No Impact 		2,0%	2,0%	0,5%	4,4%	0,7%
Impacted Positively 		6,1%	7,8%	2,2%	13,0%	2,4%

Average percentage of variation






-46%      -41%      -68%      -25%      -42%

# Back to normality and willingness to travel

## AGENTS AND STUDENTS

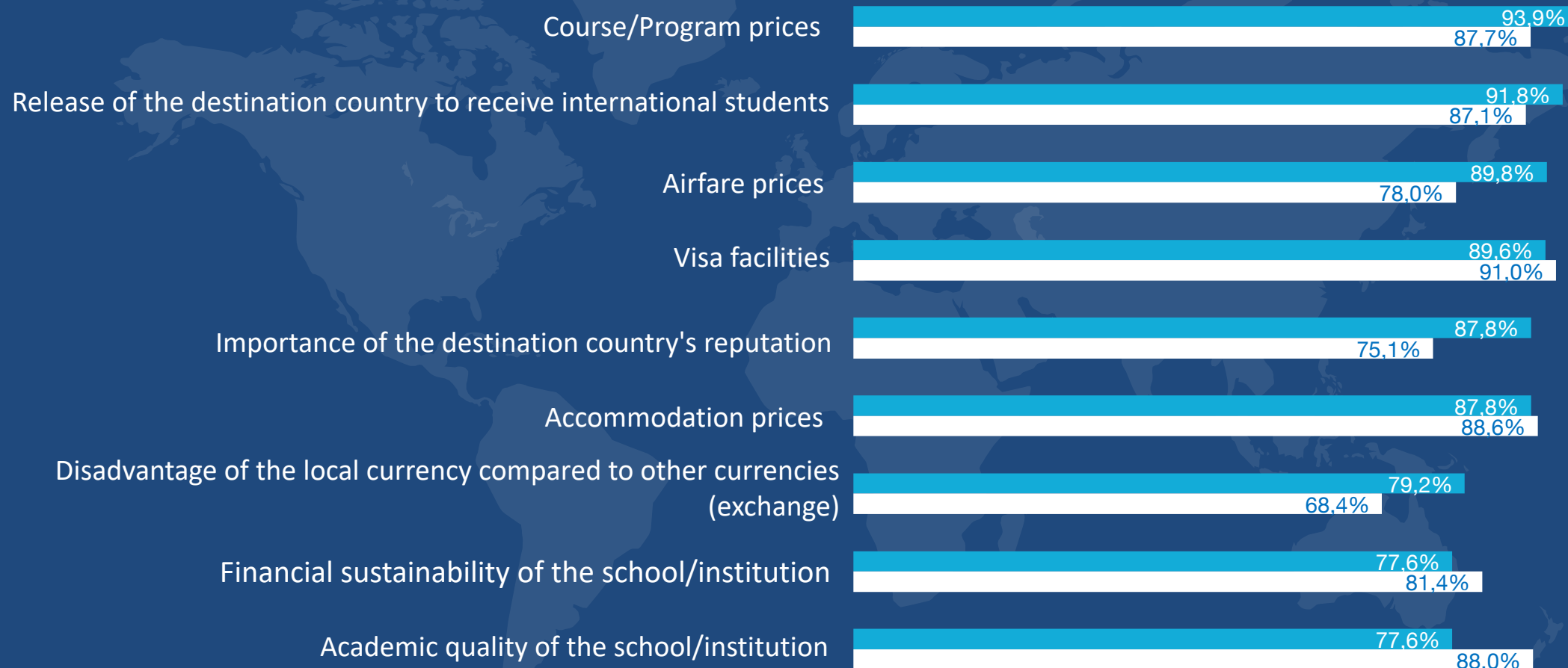


\* 12,8% of the students don't know.

	 Latin America	 Brazil	 Chile	 Colombia	 Mexico
Second semester 2021	5,8%	3,6%	1,5%	7,1%	4,4%
First semester 2022	32,2%	21,7%	35,3%	41,6%	19,7%
Second semester 2022	32,9%	26,2%	26,5%	31,3%	34,2%
In 2023 or later	16,4%	27,1%	14,7%	11,6%	24,1%
<i>Don't know</i>	12,8%	21,4%	22,0%	8,4%	17,6%

# Influencing factors in the decision to invest in an international education program (POST-COVID)

## AGENTS AND STUDENTS








■ Agents ■ Students

\* Multiple answers. Therefore, the sum is over 100%.



# Influencing factors in the decision to invest in an international education program (POST-COVID)






AGENTS

	 LATAM AMÉRICA LATINA	 Brazil	 Chile	 Colombia	 Mexico
Course/Program prices	93,9%	90,2%	83,3%	91,3%	99,2%
Release of the destination country to receive international students	91,8%	100,0%	98,9%	82,6%	97,3%
Airfare prices	89,8%	84,3%	98,7%	82,6%	99,2%
Visa facilities	89,6%	86,3%	83,3%	91,3%	99,7%
Importance of the destination country's reputation	87,8%	70,8%	98,9%	87,0%	98,6%
Accommodation prices	87,8%	84,3%	98,7%	82,6%	83,3%
Disadvantage of local currency compared to other currencies (exchange)	79,2%	96,1%	50,0%	87,0%	66,7%
Financial sustainability of the school/institution	77,6%	70,6%	83,3%	78,3%	83,3%
Academic quality of the school/institution	77,6%	64,7%	83,3%	87,0%	83,3%

to be continued...






# Influencing factors in the decision to invest in an international education program (POST-COVID)

AGENTS

	 AMÉRICA LATINA	 Brazil	 Chile	 Colombia	 Mexico
Flexible cancellation policy	73,5%	90,2%	98,6%	52,2%	83,3%
Combination of classes with cultural activities	73,5%	48,0%	66,7%	65,2%	83,1%
Benefits offered to students who started the online course (ease of visa approval or counting the time in the online course towards a post-study work visa)	58,3%	58,8%	83,3%	45,5%	66,7%
Efficiency of destination country in domestic control of the pandemic	53,1%	70,6%	32,1%	47,8%	66,5%
Combination of face-to-face and online classes	52,1%	46,0%	50,0%	54,6%	16,7%
The way the school dealt with its staffs and students during and after the pandemic	51,0%	47,1%	31,8%	47,8%	83,1%
More rigorous protocols for hygienic cleaning of the premises of the school/institution	42,9%	45,1%	33,3%	39,1%	66,7%
Stricter protocols to cleaning the accommodation	36,7%	49,0%	33,2%	34,8%	50,0%
Possibility to start the online course in the home country while it is not possible to travel	28,6%	33,3%	16,7%	21,7%	33,3%

# Influencing factors in the decision to invest in an international education program (POST-COVID)






STUDENTS

	 LATAM AMÉRICA LATINA	 Brazil	 Chile	 Colombia	 Mexico
Visa facilities	91,0%	86,5%	91,4%	92,9%	87,8%
Accommodation prices	88,6%	89,1%	91,4%	87,8%	87,7%
Academic quality of the school/institution	88,0%	80,7%	91,2%	91,0%	83,8%
Course/Program prices	87,7%	89,8%	88,2%	87,4%	86,9%
Release of the destination country to receive international students	87,1%	88,0%	91,2%	90,7%	81,6%
No change in benefits offered to international students during and after their studies (work permit, for example)	82,0%	82,8%	94,1%	88,1%	73,5%
Financial sustainability of the school/institution	81,4%	70,0%	85,3%	83,2%	78,5%
Airfare prices	78,0%	85,0%	79,4%	77,4%	79,0%
The way the school dealt with its staffs and students during and after the pandemic	76,4%	76,2%	85,3%	73,2%	79,3%

to be continued...

# Influencing factors in the decision to invest in an international education program (POST-COVID)

## STUDENTS

	 Latin America	 Brazil	 Chile	 Colombia	 Mexico
Benefits offered to students who started the online course (ease of visa approval or counting the time in the online course towards a post-study work visa)	75,4%	69,3%	79,4%	72,7%	77,4%
Importance of the destination country's reputation	75,1%	68,3%	79,4%	82,0%	66,2%
Disadvantage of local currency compared to other currencies (exchange)	68,4%	79,3%	64,7%	71,0%	66,5%
Stricter protocols for cleaning the premises of the accommodation	64,9%	74,0%	79,4%	58,9%	69,9%
Flexible cancellation policy	63,4%	65,2%	73,5%	63,9%	62,0%
Combination of face-to-face and online classes	61,4%	54,2%	55,9%	61,1%	63,8%
More rigorous protocols for hygienic cleaning of the premises of the school/institution	60,7%	72,8%	76,5%	54,8%	64,2%
Efficiency of the destination country in domestic control of the pandemic	59,4%	72,8%	79,4%	57,1%	59,7%
Possibility to start the course online in the home country while it is not possible to travel	55,9%	53,6%	58,8%	51,1%	59,0%

# Willingness to participate in an international education program (scenarios where classes are held)

## AGENTS AND STUDENTS

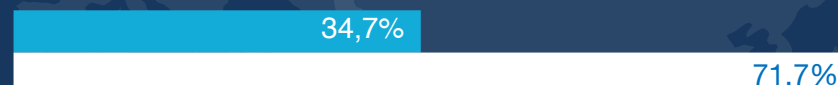
Classes only in the **face-to-face mode** with no class hours in the online format (either in the home country or the destination country).



Classes in **hybrid format** (online + face-to-face) if they have some facility to obtain a visa for students who start classes in the online modality still in home country.



Start **classes online** in the destination country fulfilling a **quarantine** period before starting classes in face-to-face format



Before the start of the face-to-face classes, do a **14-day quarantine** in a controlled place, considering all costs.



Take a **reduced load of classes** in a face-to-face format in the destination country, complemented with **online** classes during your stay.








Start classes in **online format in home country** and complete the workload in **face-to-face format** in the destination country.



■ Agents ■ Students






# Willingness to participate in an international education program (scenarios where classes are held)

AGENTS

	 Latin America	 Brazil	 Chile	 Colombia	 Mexico
Classes only in the face-to-face mode with no class hours in the online format (either in the home country or the destination country).	87,5%	84,3%	95,9%	91,3%	96,2%
Classes in hybrid format (online + face-to-face) if they have some facility to obtain a visa for students who start classes in the online modality still in home country.	58,3%	58,8%	50,0%	40,9%	50,0%
Start classes online in the destination country fulfilling a quarantine period before starting classes in face-to-face format	34,7%	29,4%	66,7%	34,8%	16,7%
Before the start of the face-to-face classes, do a 14-day quarantine in a controlled place, considering all costs.	32,7%	31,4%	16,7%	43,5%	33,3%
Take a reduced load of classes in a face-to-face format in the destination country, complemented with online classes during your stay.	22,5%	19,6%	8,7%	21,7%	8,8%
Start classes in online format in the country of origin and complete the workload in face-to-face format in the country of destiny	10,2%	19,6%	8,9%	8,7%	8,5%

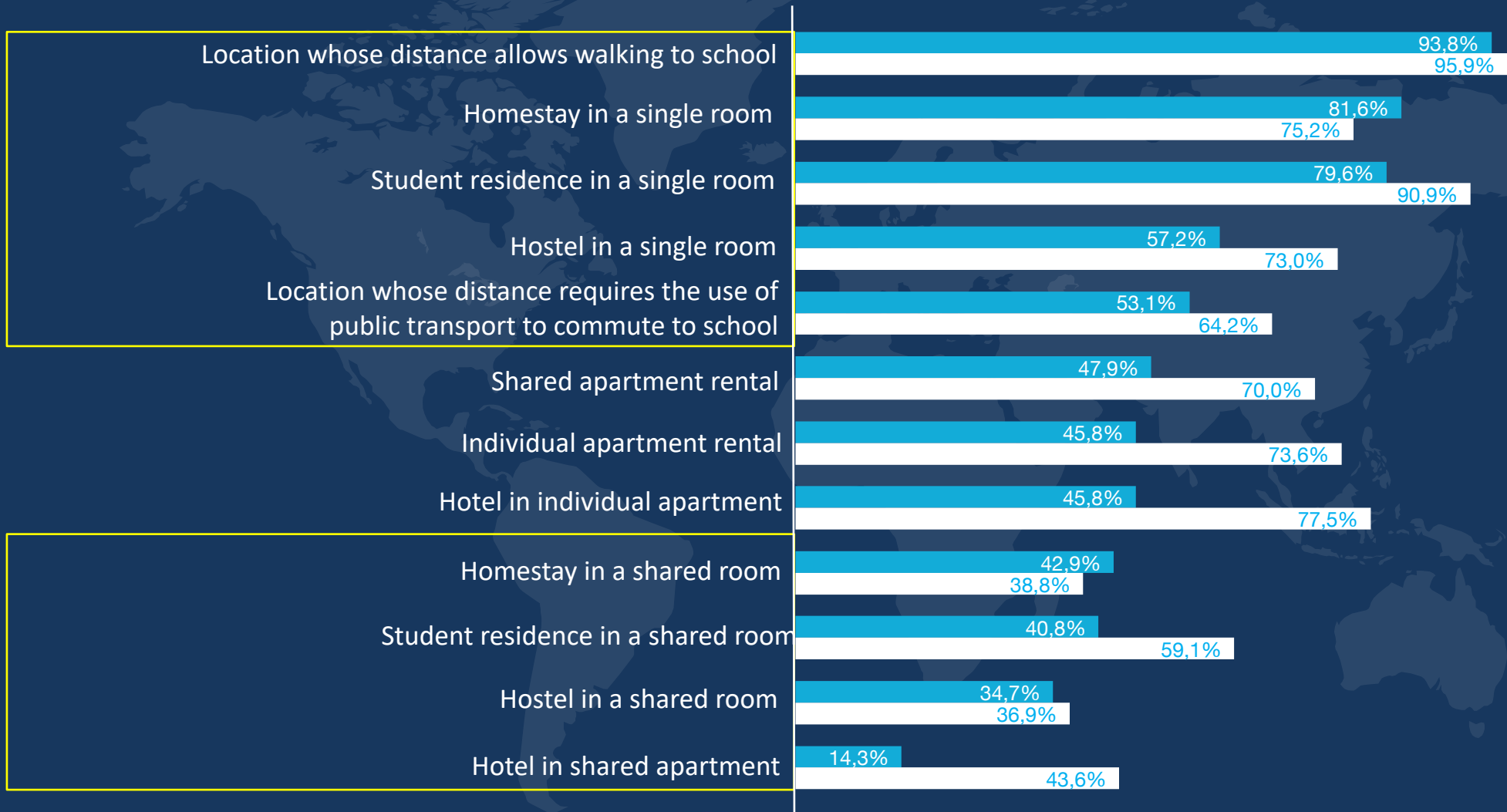
# Willingness to participate in an international education program (scenarios where classes are held)

## STUDENTS

	 Latin America	 Brazil	 Chile	 Colombia	 Mexico
Classes only in the face-to-face mode with no class hours in the online format (either in the home country or the destination country).	80,4%	65,4%	94,1%	83,5%	76,5%
Start classes online in the destination country fulfilling a quarantine period before starting classes in face-to-face format	71,7%	63,3%	75,8%	69,0%	77,0%
Classes in hybrid format (online + face-to-face) if they have some facility to obtain a visa for students who start classes in the online modality still in home country.	69,6%	66,4%	67,7%	65,2%	74,5%
Before the start of the face-to-face classes, do a 14-day quarantine in a controlled place, considering all costs.	63,5%	58,8%	67,7%	57,6%	70,4%
Start classes in online format in the country of origin and complete the workload in face-to-face format in the country of destiny	50,0%	52,3%	52,9%	43,9%	54,4%
Take a reduced load of classes in a face-to-face format in the destination country, complemented with online classes during your stay.	49,2%	54,4%	50,0%	40,7%	58,9%

# Willingness to participate in an international education program (accommodation scenario)

AGENTS AND STUDENTS








■ Agents ■ Students

\* Multiple answers. Therefore, the sum is over 100%.








# Willingness to participate in an international education program (accommodation scenarios)

AGENTS

	 Latin America	 Brazil	 Chile	 Colombia	 Mexico
Location whose distance allows walking to school	93,8%	94,1%	99,2%	95,5%	83,3%
Homestay in a single room	81,6%	90,2%	98,7%	82,6%	98,8%
Student residence in a single room	79,6%	90,0%	66,7%	78,3%	83,3%
Hostel in a single room	57,2%	60,0%	66,4%	56,5%	83,7%
Location whose distance requires the use of public transport to commute to school	53,1%	62,8%	66,8%	47,8%	50,0%
Shared apartment rental	47,9%	39,2%	50,0%	60,9%	50,0%
Individual apartment rental	45,8%	51,0%	16,7%	50,0%	33,3%
Hotel in individual apartment	45,8%	52,0%	16,7%	39,1%	66,7%
Homestay in a shared room	42,9%	35,3%	66,7%	47,8%	33,6%
Student residence in a shared room	40,8%	43,1%	33,3%	47,8%	33,3%
Hostel in a shared room	34,7%	24,0%	50,0%	47,8%	33,3%
Hotel in shared apartment	14,3%	22,0%	3,5%	26,1%	2,5%

# Willingness to participate in an international education program (accommodation scenarios)

STUDENTS

	 Latin America	 Brazil	 Chile	 Colombia	 Mexico
Location whose distance allows walking to school	95,9%	92,4%	93,9%	96,1%	96,0%
Homestay in a single room	90,9%	84,5%	91,2%	89,0%	93,0%
Student residence in a single room	77,5%	79,3%	85,3%	75,4%	77,6%
Hostel in a single room	75,2%	73,6%	58,8%	76,5%	77,6%
Location whose distance requires the use of public transport to commute to school	73,6%	57,3%	82,4%	70,7%	76,7%
Shared apartment rental	73,0%	70,9%	82,4%	75,6%	67,1%
Individual apartment rental	70,0%	47,0%	70,6%	68,4%	69,7%
Hotel in individual apartment	64,2%	61,4%	67,7%	64,4%	62,3%
Homestay in a shared room	59,1%	51,8%	50,0%	54,5%	65,8%
Student residence in a shared room	43,6%	40,7%	42,4%	37,7%	48,9%
Hostel, in a shared room	38,8%	36,7%	26,5%	37,0%	42,7%
Hotel in shared apartment	36,9%	29,2%	36,4%	36,0%	36,6%

# Country assessment during and post-Covid scenario



AGENTS	Australia	Canada	USA	Ireland	N. Zealand	UK
Competent in pandemic control protocols	49,0%	95,9%	38,8%	32,7%	61,2%	53,1%
Safe, in health terms, for the reception of international students in the near future	49,0%	89,8%	40,8%	34,7%	59,2%	57,1%
It has adequate academic infrastructure for the reception of international students in a near future	59,2%	93,9%	65,3%	46,9%	65,3%	67,4%
It has technological resources adjusted to the requirements of classes in hybrid format (online + face-to-face)	57,5%	91,5%	70,2%	46,8%	59,6%	66,0%

STUDENTS	Australia	Canada	USA	Ireland	N. Zealand	UK
Competent in pandemic control protocols	68,1%	81,8%	48,3%	46,0%	76,3%	56,4%
Safe, in health terms, for the reception of international students in the near future	65,8%	83,9%	47,3%	44,8%	73,4%	56,4%
It has adequate academic infrastructure for the reception of international students in a near future	66,0%	86,1%	71,1%	52,7%	71,4%	66,8%
It has technological resources adjusted to the requirements of classes in hybrid format (online + face-to-face)	73,0%	90,6%	81,8%	55,3%	75,1%	73,3%

\* Multiple answers. Therefore, the sum is over 100%.

# Country assessment during and post-Covid scenario















AGENTS	Australia	Canada	USA	Ireland	N. Zealand	UK
Teachers are able to teach classes in hybrid (online + face-to-face)	63,8%	87,2%	70,2%	46,8%	59,6%	72,3%
It has adequate hosting infrastructure for the reception of international students in the near future (2021-2 or 2022-1)	61,7%	95,7%	76,6%	46,8%	63,8%	72,3%
Able to offer programs with competitive prices in the near future (2021-2 or 2022-1)	51,0%	83,7%	61,2%	36,7%	49,0%	42,9%
Able to offer competitively priced accommodation in the near future (2021-2 or 2022-1)	41,3%	87,0%	50,0%	30,4%	45,7%	39,1%

STUDENTS	Australia	Canada	USA	Ireland	N. Zealand	UK
Teachers are able to teach classes in hybrid format (online + face- to-face)	74,6%	89,0%	83,0%	60,4%	77,7%	75,1%
It has adequate accommodation infrastructure for the reception of international students in the near future (2021-2 or 2022-1)	72,2%	88,4%	75,6%	56,1%	74,3%	73,8%
Able to offer programs with competitive prices in the near future (2021-2 or 2022-1)	63,8%	81,8%	56,5%	52,1%	67,3%	48,7%
Able to offer competitively priced accommodation in the near future (2021-2 or 2022-1)	60,7%	78,9%	56,8%	51,5%	65,8%	46,2%

• Multiple answers. Therefore, the sum is over 100%.









<b>AGENTS</b>	 Australia	 Canada	 USA	 Ireland	 N. Zealand	 UK
Competent in pandemic control protocols	56,0%	84,0%	42,0%	48,0%	66,0%	52,0%
Safe, in health terms, for the reception of international students in the near future	64,0%	88,0%	66,0%	72,0%	68,0%	68,0%
It has adequate academic infrastructure for the reception of international students in a near future	68,6%	94,1%	84,3%	74,5%	68,6%	76,5%
It has technological resources adjusted to the requirements of classes in hybrid format (online + face-to-face)	58,8%	90,2%	82,4%	60,8%	58,8%	76,5%







<b>STUDENTS</b>	 Australia	 Canada	 USA	 Ireland	 N. Zealand	 UK
Competent in pandemic control protocols	64,3%	74,5%	55,7%	43,7%	62,8%	51,1%
Safe, in health terms, for the reception of international students in the near future	60,8%	78,7%	58,0%	47,2%	62,0%	55,9%
It has adequate academic infrastructure for the reception of international students in a near future	64,3%	84,8%	75,8%	53,7%	59,3%	63,0%
It has technological resources adjusted to the requirements of classes in hybrid format (online + face-to-face)	63,1%	84,9%	85,5%	57,7%	61,8%	69,4%

\* Multiple answers. Therefore, the sum is over 100%.



<b>AGENTS</b>	 Australia	 Canada	 USA	 Ireland	 N. Zealand	 UK
Teachers are able to teach classes in hybrid format (online + face-to-face)	47,8%	80,4%	76,1%	56,5%	50,0%	65,2%
It has adequate accommodation infrastructure for the reception of international students in the near future (2021-2 or 2022-1)	55,1%	85,7%	77,6%	63,3%	59,2%	71,4%
Able to offer programs with competitive prices in the near future (2021-2 or 2022-1)	42,9%	85,7%	49,0%	73,5%	40,8%	46,9%
Able to offer competitively priced accommodation in the near future (2021-2 or 2022-1)	40,4%	83,0%	46,8%	70,2%	46,8%	44,7%

<b>STUDENTS</b>	 Australia	 Canada	 USA	 Ireland	 N. Zealand	 UK
Teachers are able to teach classes in hybrid (online + face-to-face)	62,6%	84,3%	84,3%	58,0%	61,6%	65,9%
It has adequate hosting infrastructure for the reception of international students in the near future (2021-2 or 2022-1)	64,1%	84,9%	78,9%	59,3%	59,9%	63,8%
Able to offer programs with competitive prices in the near future (2021-2 or 2022-1)	51,6%	77,5%	63,1%	55,2%	51,0%	43,5%
Able to offer competitively priced accommodation in the near future (2021-2 or 2022-1)	55,0%	78,2%	65,8%	53,0%	53,0%	45,0%

\* Multiple answers. Therefore, the sum is over 100%.



AGENTS	Australia	Canada	USA	Ireland	N. Zealand	UK
Competent in pandemic control protocols	66,7%	98,7%	16,7%	33,3%	83,3%	83,3%
Safe, in health terms, for the reception of international students in the near future	66,7%	83,3%	16,7%	33,3%	83,3%	66,7%
It has adequate academic infrastructure for the reception of international students in a near future	83,3%	99,5%	66,7%	50,0%	99,7%	83,3%
It has technological resources adjusted to the requirements of classes in hybrid format (online + face-to-face)	66,7%	99,6%	83,3%	33,3%	66,7%	83,3%

STUDENTS	Australia	Canada	USA	Ireland	N. Zealand	UK
Competent in pandemic control protocols	73,5%	73,5%	29,4%	52,9%	79,4%	41,2%
Safe, in health terms, for the reception of international students in the near future	72,7%	78,8%	30,3%	48,5%	78,8%	39,4%
It has adequate academic infrastructure for the reception of international students in a near future	75,0%	84,4%	68,8%	71,9%	75,0%	56,3%
It has technological resources adjusted to the requirements of classes in hybrid format (online + face-to-face)	65,6%	87,5%	81,3%	62,5%	78,1%	62,5%

\* Multiple answers. Therefore, the sum is over 100%.



<b>AGENTS</b>	Australia	Canada	USA	Ireland	N. Zealand	UK
Teachers are able to teach classes in hybrid (online + face-to-face)	50,5%	66,7%	50,6%	50,3%	50,7%	83,3%
It has adequate accommodation infrastructure for the reception of international students in the near future (2021-2 or 2022-1)	50,7%	99,8%	50,1%	33,3%	83,3%	83,3%
Able to offer programs with competitive prices in the near future (2021-2 or 2022-1)	83,3%	83,3%	33,3%	16,7%	98,6%	16,7%
Able to offer competitively priced accommodation in the near future (2021-2 or 2022-1)	83,3%	83,3%	16,7%	16,7%	99,1%	16,7%

<b>STUDENTS</b>	Australia	Canada	USA	Ireland	N. Zealand	UK
Teachers are able to teach classes in hybrid (online + face-to-face)	83,9%	80,7%	80,7%	71,0%	87,1%	74,2%
It has adequate accommodation infrastructure for the reception of international students in the near future (2021-2 or 2022-1)	81,3%	84,4%	68,8%	68,8%	84,4%	62,5%
Able to offer programs with competitive prices in the near future (2021-2 or 2022-1)	75,0%	84,4%	65,6%	78,1%	71,9%	50,0%
Able to offer competitively priced accommodation in the near future (2021-2 or 2022-1)	67,7%	74,2%	71,0%	74,2%	71,0%	51,6%

\* Multiple answers. Therefore, the sum is over 100%.



# Country assessment during and post-Covid scenario















<b>AGENTS</b>	Australia	Canada	USA	Ireland	N. Zealand	UK
Competent in pandemic control protocols	39,1%	<b>91,3%</b>	39,1%	30,4%	<b>52,2%</b>	47,8%
Safe, in health terms, for the reception of international students in the near future	39,6%	<b>82,6%</b>	43,5%	26,1%	43,5%	<b>52,2%</b>
It has adequate academic infrastructure for the reception of international students in a near future	39,9%	<b>91,3%</b>	<b>60,9%</b>	30,4%	52,2%	<b>60,9%</b>
It has technological resources adjusted to the requirements of classes in hybrid format (online + face-to-face)	50,0%	<b>86,4%</b>	<b>63,6%</b>	36,4%	40,9%	59,1%

<b>STUDENTS</b>	Australia	Canada	USA	Ireland	N. Zealand	UK
Competent in pandemic control protocols	74,4%	<b>78,9%</b>	44,5%	43,2%	<b>86,4%</b>	53,3%
Safe, in health terms, for the reception of international students in the near future	71,6%	<b>80,2%</b>	42,9%	42,6%	<b>84,5%</b>	54,8%
It has adequate academic infrastructure for the reception of international students in a near future	72,5%	<b>83,8%</b>	72,5%	51,0%	<b>81,8%</b>	68,5%
It has technological resources adjusted to the requirements of classes in hybrid format (online + face-to-face)	82,3%	<b>91,8%</b>	81,6%	57,4%	<b>83,3%</b>	76,1%

\* Multiple answers. Therefore, the sum is over 100%.







# Country assessment during and post-Covid scenario







<b>AGENTS</b>	 Australia	 Canada	 USA	 Ireland	 N. Zealand	 UK
Teachers are able to teach classes in hybrid (online + face-to-face)	52,2%	<b>91,3%</b>	<b>69,6%</b>	30,4%	47,8%	60,9%
It has adequate accommodation infrastructure for the reception of international students in the near future (2021-2 or 2022-1)	50,0%	<b>95,5%</b>	<b>77,3%</b>	31,8%	45,5%	63,6%
Able to offer programs with competitive prices in the near future (2021-2 or 2022-1)	56,5%	<b>87,0%</b>	<b>60,9%</b>	21,7%	47,8%	43,5%
Able to offer competitively priced accommodation in the near future (2021-2 or 2022-1)	45,5%	<b>86,4%</b>	50,0%	13,6%	45,5%	40,9%

<b>STUDENTS</b>	 Australia	 Canada	 USA	 Ireland	 N. Zealand	 UK
Teachers are able to teach classes in hybrid (online + face-to-face)	84,4%	<b>89,7%</b>	75,8%	<b>86,7%</b>	81,7%	62,1%
It has adequate accommodation infrastructure for the reception of international students in the near future (2021-2 or 2022-1)	76,3%	<b>87,0%</b>	74,7%	<b>83,7%</b>	79,3%	55,7%
Able to offer programs with competitive prices in the near future (2021-2 or 2022-1)	52,2%	<b>76,4%</b>	43,4%	<b>75,4%</b>	67,0%	47,8%
Able to offer competitively priced accommodation in the near future (2021-2 or 2022-1)	53,1%	<b>75,3%</b>	43,5%	<b>73,3%</b>	61,3%	47,3%

\* Multiple answers. Therefore, the sum is over 100%.







# Country assessment during and post-Covid scenario







<b>AGENTS</b>	 Australia	 Canada	 USA	 Ireland	 N. Zealand	 UK
Competent in pandemic control protocols	33,3%	<b>98,4%</b>	50,0%	66,7%	51,0%	<b>83,3%</b>
Safe, in health terms, for the reception of international students in the near future	50,0%	<b>83,3%</b>	33,3%	<b>66,7%</b>	53,2%	<b>66,7%</b>
It has adequate academic infrastructure for the reception of international students in a near future	66,7%	<b>83,3%</b>	66,7%	66,7%	33,3%	<b>83,3%</b>
It has technological resources adjusted to the requirements of classes in hybrid format (online + face-to-face)	<b>66,7%</b>	<b>98,4%</b>	<b>66,7%</b>	33,3%	33,3%	<b>66,7%</b>

<b>STUDENTS</b>	 Australia	 Canada	 USA	 Ireland	 N. Zealand	 UK
Competent in pandemic control protocols	56,8%	<b>87,2%</b>	58,6%	47,1%	59,5%	<b>63,9%</b>
Safe, in health terms, for the reception of international students in the near future	55,1%	<b>89,9%</b>	56,4%	46,7%	53,7%	<b>62,6%</b>
It has adequate academic infrastructure for the reception of international students in a near future	53,7%	<b>90,8%</b>	<b>68,7%</b>	51,5%	53,7%	66,1%
It has technological resources adjusted to the requirements of classes in hybrid format (online + face-to-face)	58,9%	<b>89,7%</b>	<b>82,1%</b>	49,6%	60,3%	71,0%

\* Multiple answers. Therefore, the sum is over 100%.

# Country assessment during and post-Covid scenario

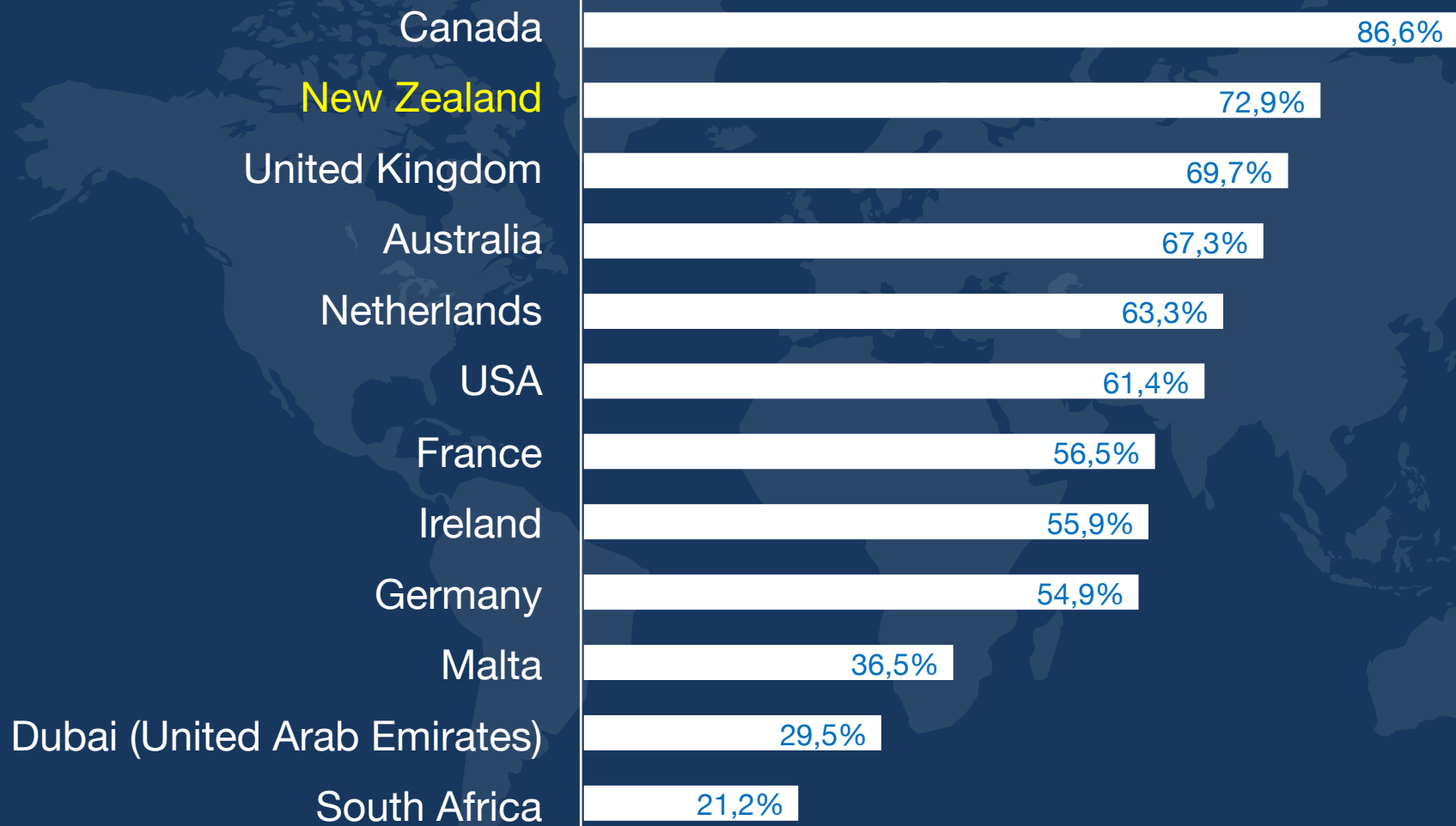
<b>AGENTS</b>	 Australia	 Canada	 USA	 Ireland	 N. Zealand	 UK
Teachers are able to teach classes in hybrid (online + face-to-face)	80,5%	99,8%	98,6%	40,9%	60,0%	98,4%
It has adequate hosting infrastructure for the reception of international students in the near future (2021-2 or 2022-1)	83,3%	83,3%	83,3%	51,0%	66,7%	83,3%
Able to offer programs with competitive prices in the near future (2021-2 or 2022-1)	50,7%	83,3%	66,7%	50,7%	33,3%	33,3%
Able to offer competitively priced accommodation in the near future (2021-2 or 2022-1)	33,3%	99,8%	50,0%	51,5%	16,7%	33,3%

<b>STUDENTS</b>	 Australia	 Canada	 USA	 Ireland	 N. Zealand	 UK
Teachers are able to teach classes in hybrid (online + face-to-face)	64,0%	90,2%	81,8%	56,0%	61,8%	75,6%
It has adequate hosting infrastructure for the reception of international students in the near future (2021-2 or 2022-1)	59,8%	90,6%	75,0%	53,6%	55,8%	75,5%
Able to offer programs with competitive prices in the near future (2021-2 or 2022-1)	56,8%	89,2%	59,9%	53,6%	50,5%	55,4%
Able to offer competitively priced accommodation in the near future (2021-2 or 2022-1)	56,4%	84,6%	59,1%	52,7%	49,1%	48,6%

\* Multiple answers. Therefore, the sum is over 100%.

# Destination of interest for a future international education program (post-Covid)






STUDENTS



\*Sum of great interest (options 4 + 5)

# Destination of interest for a future international education program (post-Covid)

STUDENTS

	 Latin America	 Brazil	 Chile	 Colombia	 Mexico
Canada	86,6%	80,3%	76,5%	84,2%	90,2%
New Zealand	72,9%	58,5%	67,6%	82,0%	56,5%
United Kingdom	69,7%	69,9%	64,7%	69,6%	69,8%
Australia	67,3%	58,5%	60,6%	74,4%	55,6%
Netherlands	63,3%	51,7%	45,5%	61,9%	65,6%
USA	61,4%	70,7%	52,9%	59,5%	64,2%
France	56,5%	58,3%	41,2%	49,7%	63,7%
Ireland	55,9%	55,5%	51,5%	52,4%	58,3%
Germany	54,9%	43,3%	47,1%	53,8%	55,8%
Malta	36,5%	38,1%	30,3%	41,3%	28,4%
Dubai (United Arab Emirates)	29,5%	34,3%	11,8%	25,7%	34,5%
South Africa	21,2%	27,5%	11,8%	21,8%	18,8%

\* Multiple answers. Therefore, the sum is over 100%.

# Reasons that would influence the choice of the education agency






STUDENTS



\* Multiple answers. Therefore, the sum is over 100%.

# Willingness to participate in an international education program (accommodation scenarios)

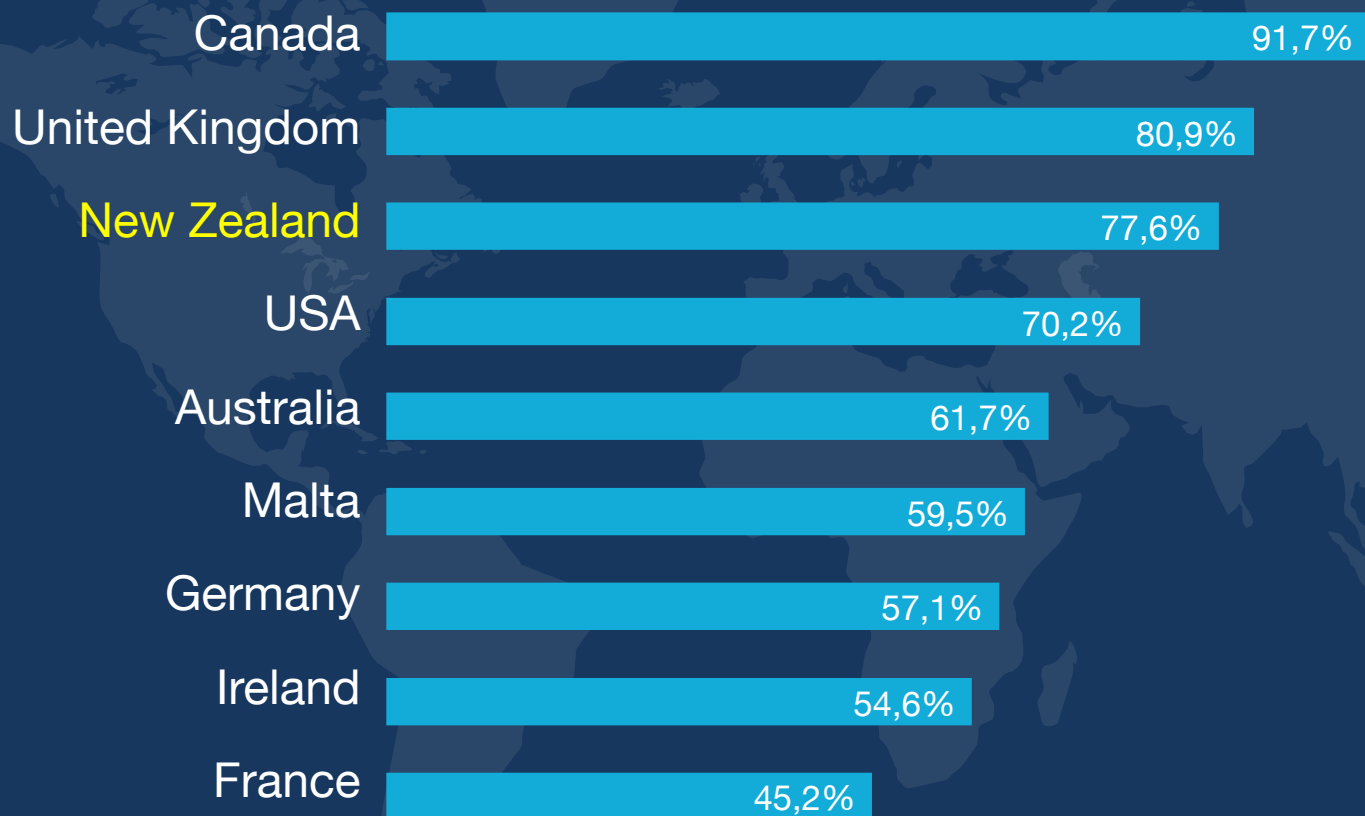
## STUDENTS

	 Latin America	 Brazil	 Chile	 Colombia	 Mexico
Payment method compatible with my budget	81,1%	85,5%	84,9%	74,0%	88,2%
The agency is recognized by the government of the destination country	79,2%	73,8%	84,9%	79,0%	77,7%
The agency has international recognition or certification	72,7%	75,0%	78,8%	69,4%	76,4%
Confidence in the program offered	71,5%	79,0%	72,7%	68,8%	76,4%
Personalized attendance	67,9%	59,6%	66,7%	68,8%	69,4%
Ease of contact	67,9%	75,9%	81,8%	64,5%	72,1%
Guarantee of the agency in offering a safe exchange from a sanitary point of view	64,1%	72,5%	69,7%	53,0%	75,6%
Final price of the program/course	53,4%	73,2%	78,8%	53,6%	51,5%
The fact that is a specialized agency	47,7%	47,2%	51,5%	45,7%	51,5%
Agency financial sustainability	47,1%	47,8%	66,7%	41,5%	51,1%
Suitable office	42,6%	47,8%	51,5%	28,6%	60,3%
Online attendance	40,1%	43,5%	42,4%	41,5%	40,6%
Easy access location	37,8%	41,1%	51,5%	29,3%	47,2%
Face-to-face attendance	34,3%	40,4%	39,4%	29,0%	40,6%








# Reputation of countries in working with agents

AGENTS



# Willingness of clients to wait of NZ to reopen to receive international students:

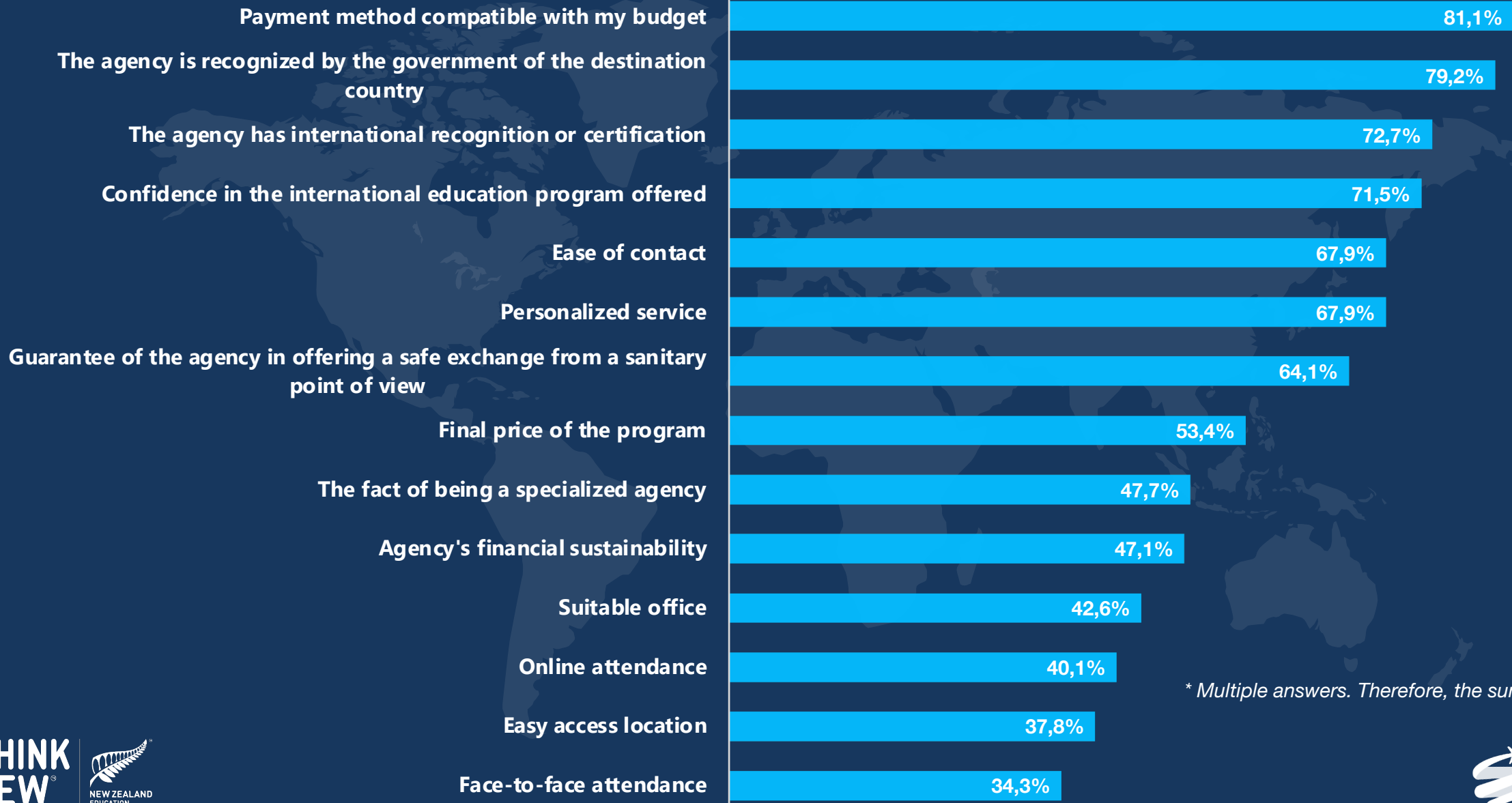
					
		Brazil	Chile	Colombia	Mexico
<b>1 (not willing)</b>	16,2%	19,1%	17,9%	<b>19,0%</b>	25,0%
<b>2</b>	14,3%	<b>36,2%</b>	16,3%	<b>23,8%</b>	16,7%
<b>3</b>	<b>31,5%</b>	29,8%	17,2%	<b>33,3%</b>	16,7%
<b>4</b>	12,2%	8,5%	17,4%	9,5%	8,3%
<b>5 (fully arranged)</b>	25,8%	6,4%	<b>31,2%</b>	14,3%	<b>33,3%</b>
<b>SUM (1+2)</b>	<b>30,5%</b>	<b>55,3%</b>	<b>34,2%</b>	<b>42,9%</b>	<b>41,7%</b>
<b>SUM (4+5)</b>	<b>38,0%</b>	<b>14,9%</b>	<b>48,6%</b>	<b>23,8%</b>	<b>41,7%</b>

to be continued...

\*Sum of high reputation options (4 + 5)

# Main reasons for influencing the choice of the education agency

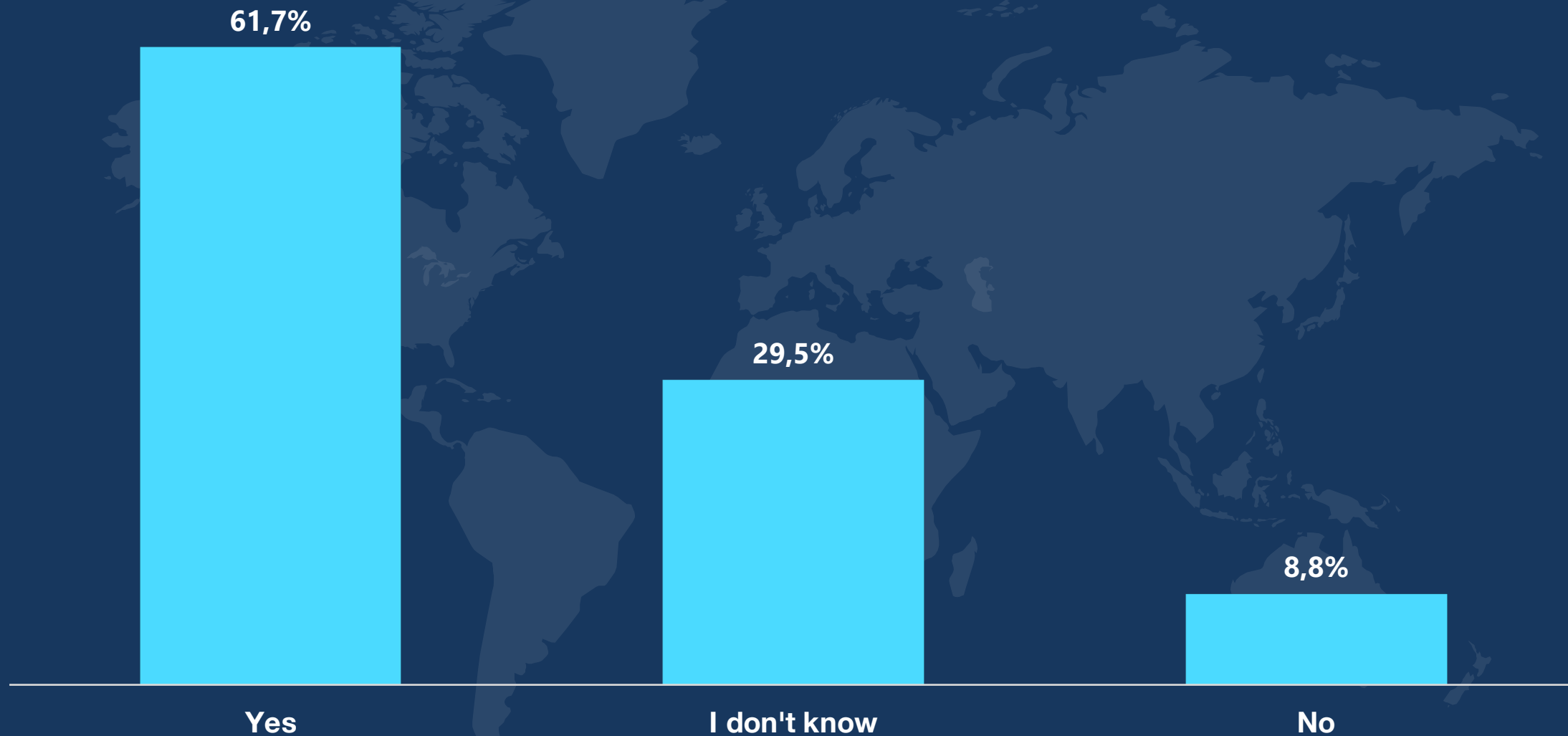
STUDENTS



\* Multiple answers. Therefore, the sum is over 100%.

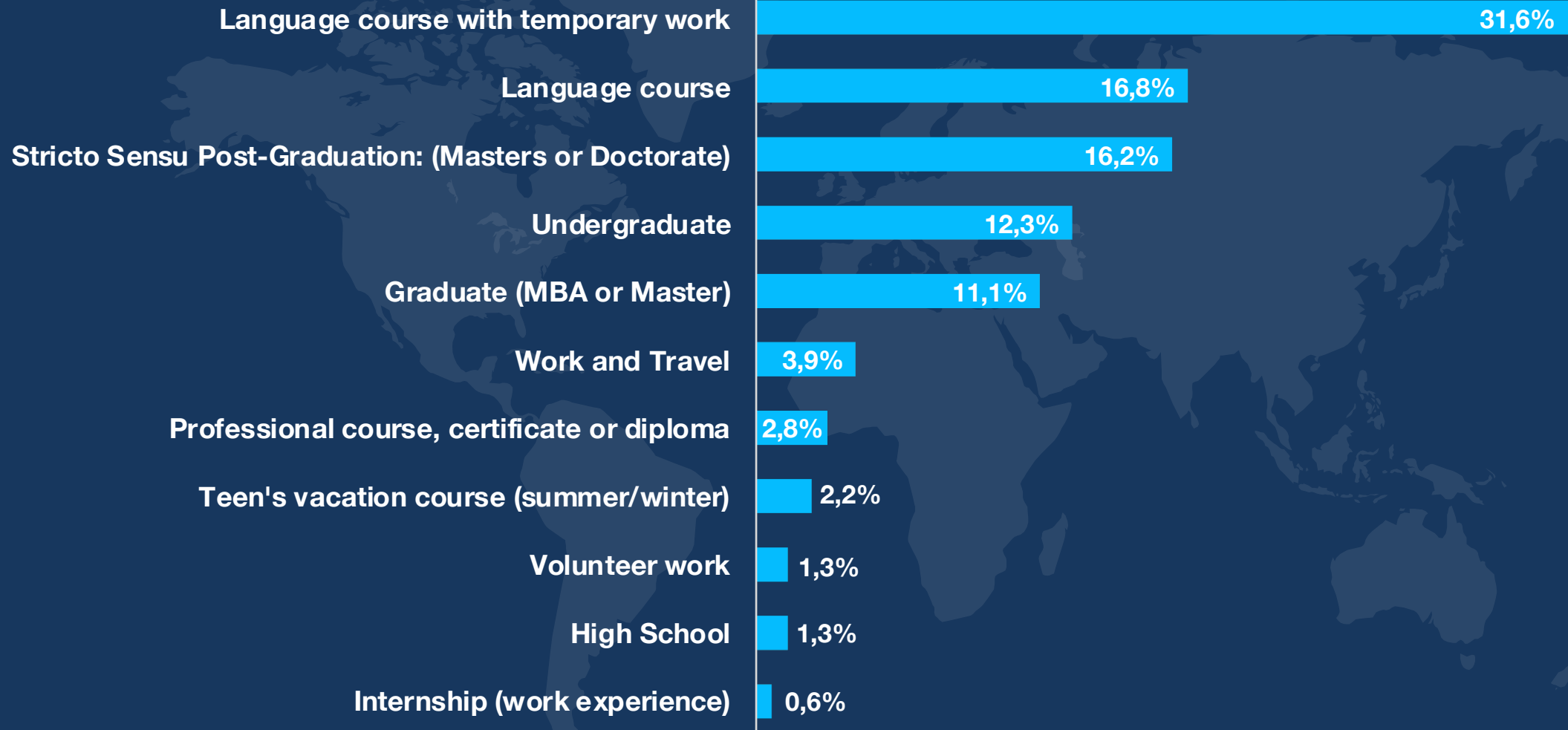
# Intention to have an education agency to organize the future international education program

STUDENTS



# Type of program wanted

STUDENTS



\* Multiple answers. Therefore, the sum is over 100%.