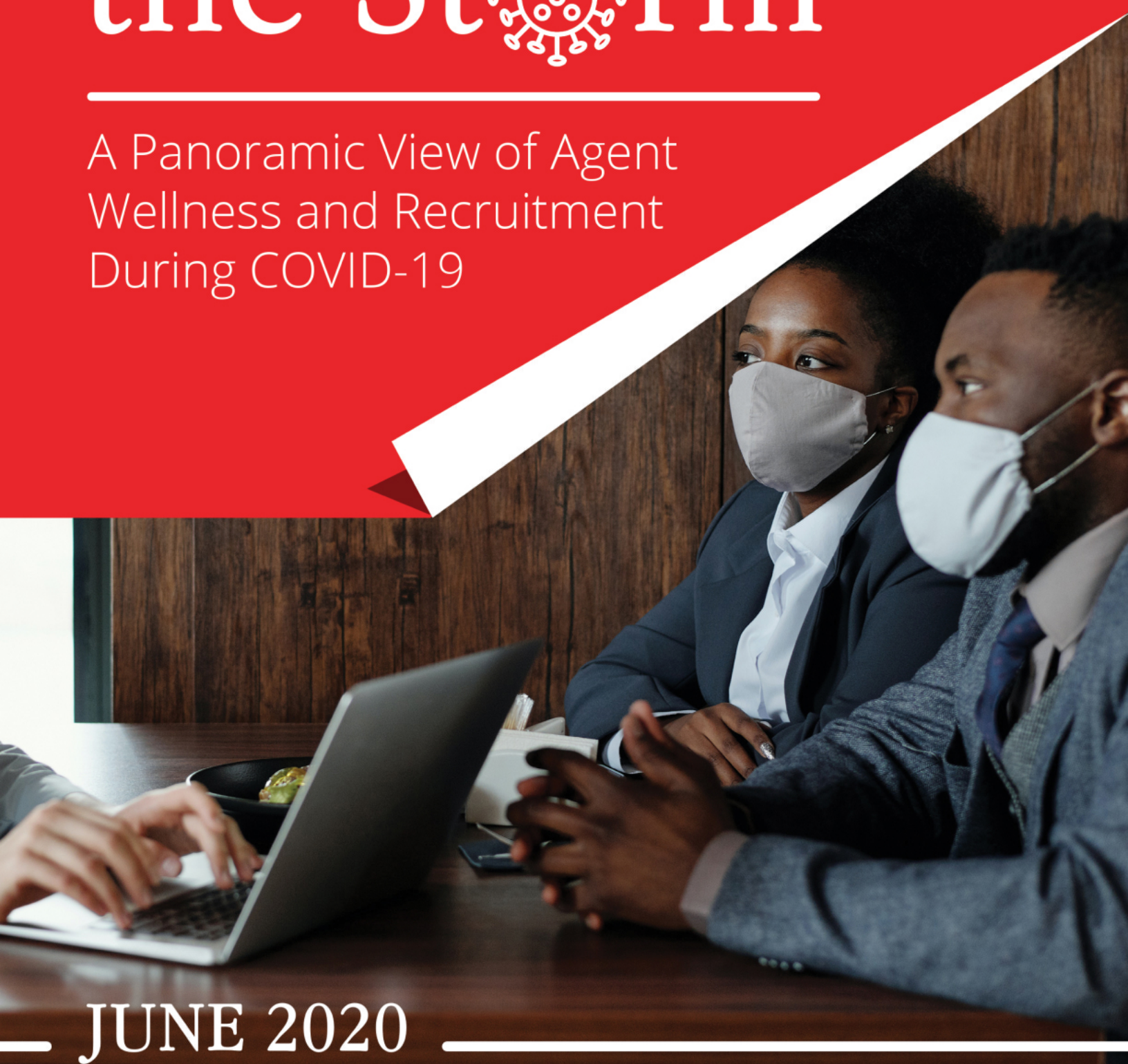




Battling the Storm

A Panoramic View of Agent
Wellness and Recruitment
During COVID-19



JUNE 2020

Executive Insights

The international education sector is facing a high-stakes global health crisis. Here we are, after a pandemic classification from the World Health Organization (WHO) and subsequent travel bans and restrictions: students stranded at their international residence halls or at home, colleges and universities gearing up for online instruction, and deferment of enrollment on the horizon for many worried learners and their parents.

Now more than ever, colleges and universities that count on their international students need to pay close attention to their relationships with education agents.

As the “frontliners” of institutions overseas, agents are a window into how the international education industry is navigating COVID-19. Education counselling organizations have matured in recent years, being in operation for six years or longer or even 11 years or beyond.¹ COVID-19, however, is perhaps nothing like what they have previously experienced, imposing widespread mobility restrictions that have gone on for at least two months in India, the Indian Subcontinent, and other countries with sizable international student markets. According to UNESCO data, more than 1.3 billion learners have been affected by the pandemic as of March 23. Schools in 188 countries have closed their campuses, while some 63 million educators have been forced to transition to a platform they are not closely familiar with.

They are facing challenges on a scale that they have never encountered before, such as halted on-ground edufairs and marketing activities, income losses and other financial setbacks, and the grim possibility of catching the virus itself. The fall 2020 and spring 2021 intakes also appear to hang in the balance.

It is important not only to provide these partners in growth with opportunities to continue recruiting, but also to be aware of factors that affect their work and well-being. In the current environment, that means sending multi-phase communications and updates, answering inquiries for intake deferrals, refunds, and inquiries for students who already have their study permits. Official communications from the High Commissions and government bodies also need to be cascaded to them immediately.

Virtual is the New Black: Go Online

It is absolutely important for higher education institutions (HEIs) to be visible at this critical time in history. The webinar platform is one avenue to do this, allowing them to maintain interactive exchange with agents, students and their parents. It engages not just current agents and their prospective students, but also new agents who are yet to join the folds. The virtual platform affords them to discuss insights on holistic student support, movement to online learning, and prospects and opportunities for recovery in international education, to name a few.

The virtual craze should extend beyond online conferences. While mobility is limited, your institution can create VR campus site inspections the agents can use in their recruitment. These virtual tours can help prospective families make their choice, especially if they are dissatisfied with their child's current learning experience.

Technology is an industry enabler. While mobility is limited, HEIs can create virtual reality (VR) campus site tours the agents can use in their recruitment. These virtual tours can help prospective families make an informed choice, especially if they are thinking twice about their child's learning experience abroad while the pandemic still rages on.

Offer Compassion

At a time when students are both morally and financially distraught, it is important to respond to the needs of the various cohorts of international students with empathy and utmost consideration. Leniency in the requirements, at least for the next few intakes, will go a long way in serving the students' needs and expediting the process for agents.

Compassion can take the form of reduced English language requirements, comparable to the set of rules applying to domestic students; issuance of offer letters and admission letters within two working days; offering payment plans for the upcoming semester or another form of financial aid; and continuing engagement even while students are in their home country, so that they do not lose interest or become anxious enough to stall or change their study plans.

I have heard of institutions that plan to keep their freshmen and seniors in in-person classes (groups likely raring to have face-to-face interaction), while sophomores and juniors are poised to study online. It's fresh, it's innovative, and while it is not immune to criticism or pushback, it's a step in the right direction in making sure the different cohorts of students are engaged based on their motivations.

Revisit Marketing Strategies

It's time for HEIs to go back to the drawing board. Old ways and methods no longer cut it in the "new normal." They should revisit the program offerings, student services, and stand-out qualities that keep them attractive to students; agents will need these tools in their arsenal to recruit prospective students.

With limited mobility, institutions have to do away with standard “Apply now!” messages in their promotions. Instead, maximize agent involvement in communicating the strengths of the institutions to applicants. Resources such as how-to blog posts and e-seminars related to course offerings, along with Facebook Live and interactive sessions on social media, can help draw interest and sustain it enough to prompt application and enrollment.

One of the optimistic findings of our agent survey is that agents are ready and willing to recruit amid the pandemic. Given the right tools, they will be an HEI’s secret weapon to enrollment levels within healthy expectations.

Empower Agents

It goes without saying that agents, just like anyone else, are also facing personal struggles and trying to make ends meet. They are also striving for a “better normal.”

It is with hope that this report reinforces the rich knowledge base that agents provide in recruitment and getting into the student’s psyche and disposition, particularly at an uncertain time like today. Agents are valuable assets - our gateway to our “customers” and their study-abroad goals.

May this report prompt us to think further, ask more questions, and expand our view of a pandemic-riddled world that entails new ways of attracting, recruiting, and retaining learners.

Thank you for downloading and reading this report, and please take care and stay safe.



Suneetha Qureshi
VP, MSM Global

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Introduction: Facilitating Agent Wellness

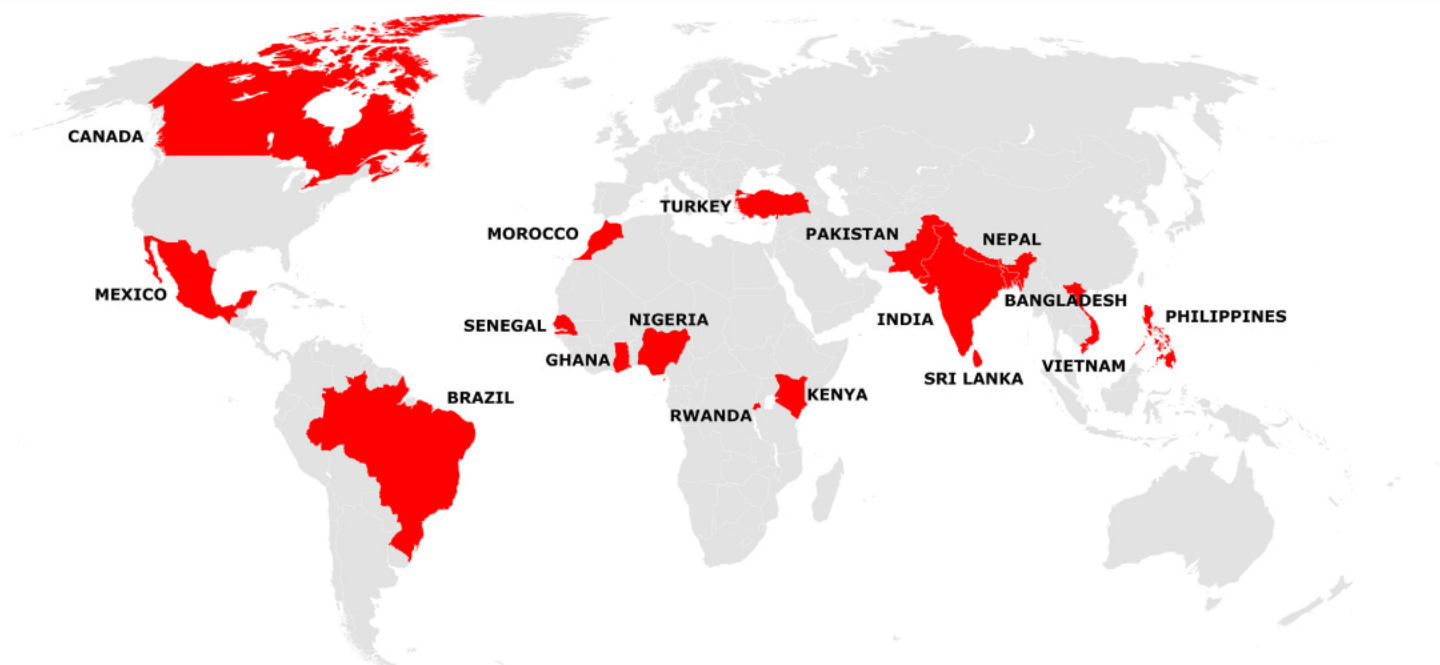
The emergence of the COVID-19 pandemic has posed new and diverse challenges for education agents: restrictions on mobility and thus on their on-ground marketing activities, hesitation from students and their families, and the cancellation of events and edufairs that used to be a vital artery through which their student recruitment flows.

Higher education institutions (HEIs), as a result, are in a scramble to find ways to recruit international students anew. With enrollment numbers in a downward turn across the globe, agents are the first casualty of an unseen enemy, left with the responsibility of engaging students and keeping a pipeline of applications going.

Budget and staff cuts are happening in HEIs across the board. But can they still invest what they can in the best possible failsafes?

To get an accurate sense of how recruiters and their practice are faring amid the pandemic, MSM surveyed 395 education agents from 30 of the most viable city targets for international students. The survey was conducted in June 2020, three months after COVID-19 was declared by the World Health Organization (WHO) a pandemic.

The agents who responded to the survey are located across 17 countries in the world as part of MSM's expansive agent network.



About MSM

MSM is a leading global platform that provides business development and marketing solutions to public and private institutions in the international education sector. Headquartered in British Columbia, we are a proud partner of 40 HEIs in Canada, the United States, the United Kingdom, Australia, and other key markets worldwide. We establish global and in-country offices, manage agent networks, and deliver targeted numbers in student recruitment for a real ROI and sustained institutional growth. Learn more at www.msquaremedia.com.

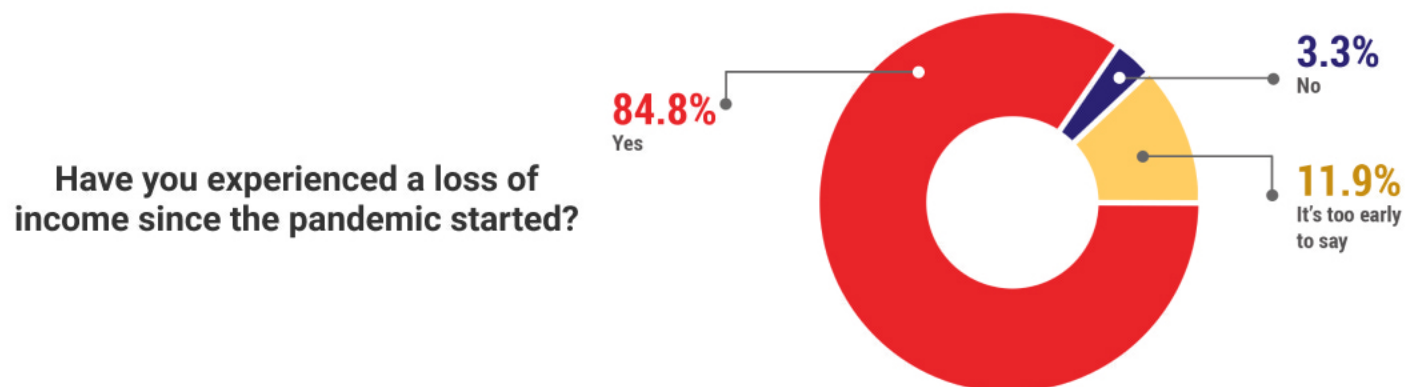
COVID-19 Effects on Agent Income and Activities

The dramatically reduced number of international students who are able and willing to study abroad at this time could rack up multibillion dollar losses in leading study-abroad destinations, such as the United States, the United Kingdom, Australia, and Canada.²

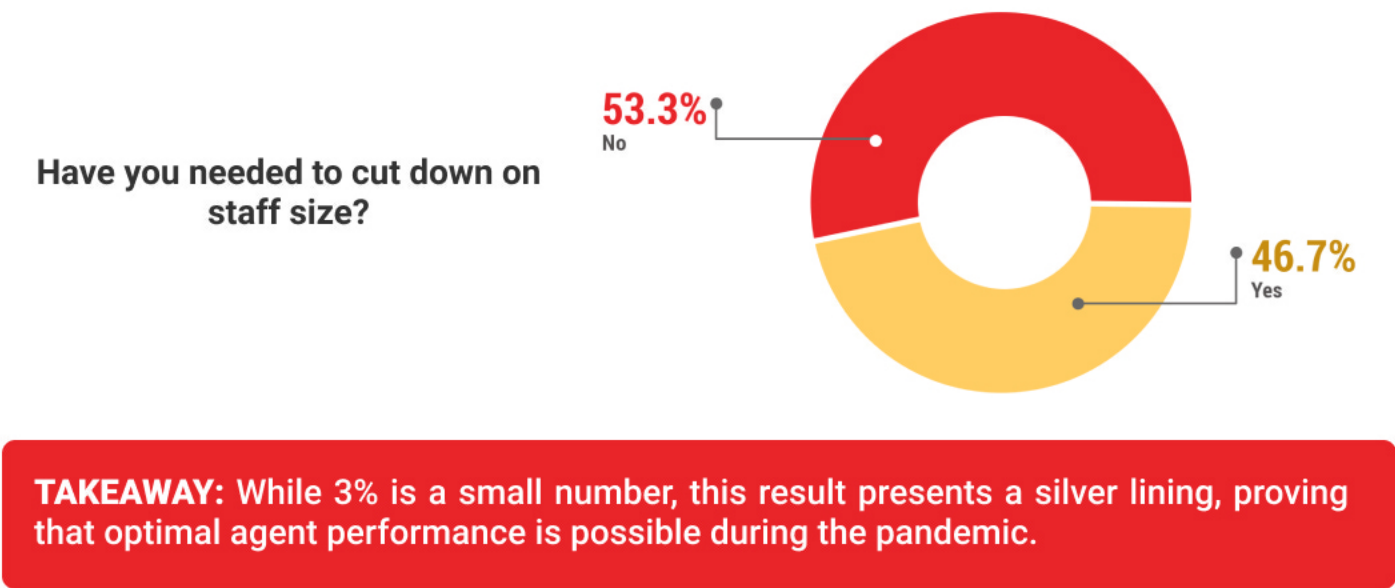
Loss Of Income Related To The Pandemic

84.8% of agents are experiencing a loss of income, suggesting a struggle in two sources of revenue: partner institutions and prospective students. With academic institutions around the world experiencing budget cuts, they may be forced to pull funds meant for recruitment.

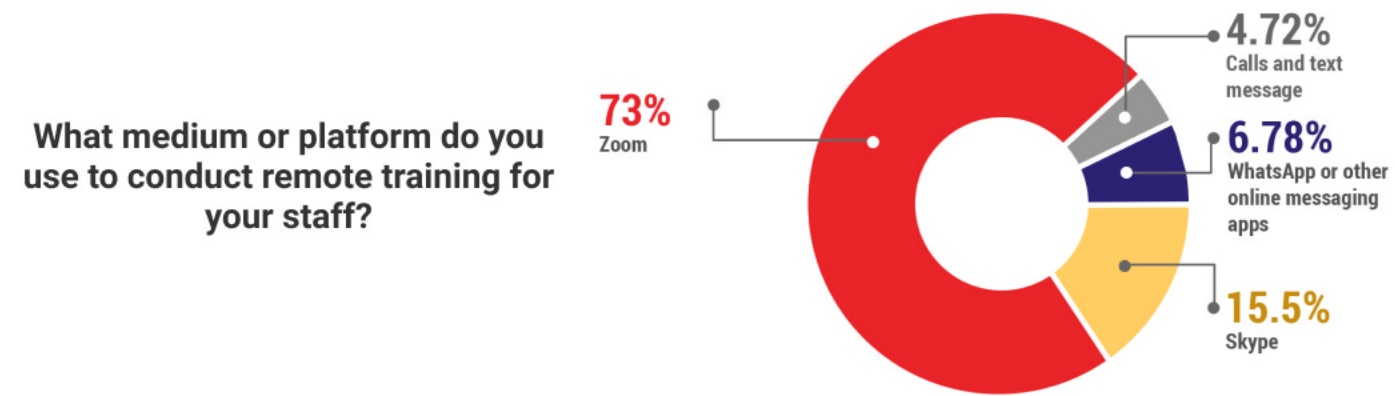
Meanwhile, 3.3% have reported being able to maintain their usual income flow.



46.7% of agents claim they have needed to cut down on staff size, referencing an ability to adapt amid the challenges and limitations and the importance of agent support from HEIs.



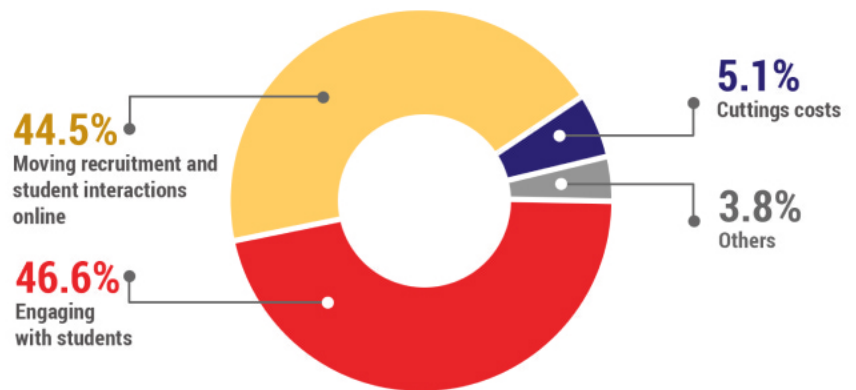
Virtual Recruitment Readiness



88.5% of agents have reported using online conferencing programs such as Zoom, Skype, and Google Meet. This astounding number denotes a strong readiness to recruit virtually and a strong familiarity with the necessary tools.

The survey also gathered responses for what agents have been most concerned with. Results showed that 46.6% of agents have been focused on student engagement, while another 44.3% have prioritized moving recruitment and student interactions online. At the third rank of biggest agent concerns is cutting operations costs at 5.1%.

What are you currently focusing on?



Of all student recruitment activities, the following have been successfully transferred online, according to at least 75% of agents:



Marketing and promotions
(83.8%)



Student counselling
(82.8%)



Application processing
(75.9%)

Moving IELTS classes and language exams online has seen little success. To mitigate this, the three IELTS test-issuing bodies (IDP Education, the British Council, and Cambridge Assessment English) have recently launched the IELTS Indicator online test as a temporary measure for English language proficiency.³

TAKEAWAY: The findings for virtual recruitment readiness paint a clear picture of current education agent outlook: a strong dedication to keep students committed to their study-abroad plans. Under these circumstances, colleges and universities may be better off seeking agents that are technology-oriented and experienced in student counseling.

Student Services and Relationships

The ability of agents to directly know the outlook of prospective students will become increasingly invaluable to colleges and universities. With the current situation, courting students into completing their application process and joining the next term greatly relies on supporting their needs and prompt information dissemination among HEIs.⁴

Students' Application Challenges



Hesitation to continue application (57%)



Lack of internet connection (51.4%)



Lack of proper equipment (37.9%)

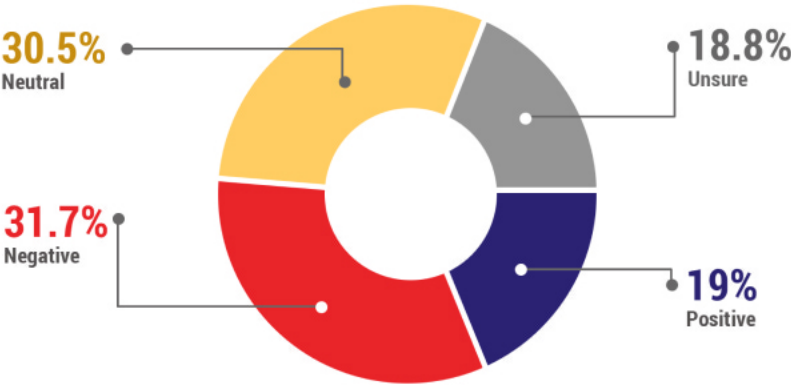
Through interactions with prospective students, agents have pinpointed a hesitation to continue applications, the lack of internet connection, and the lack of proper equipment as the major threats to application completion.

With online classes or blended learning at the forefront of classroom instruction alternatives, these findings may set a precedent for their success.

TAKEAWAY: If left unaddressed by HEIs, students' lack of internet connection and proper equipment may impede their study-abroad plans and negatively affect their overall experience. The resistance to an online intake gives agents an urgent need to know if their HEI partner can offer non-virtual alternatives to online classes.

Regarding online classes, 31.7% of agents feel negatively about students' readiness to partake in online programs, while only 19% feel positive about it.

How do you feel about students' readiness to take part in an online program?

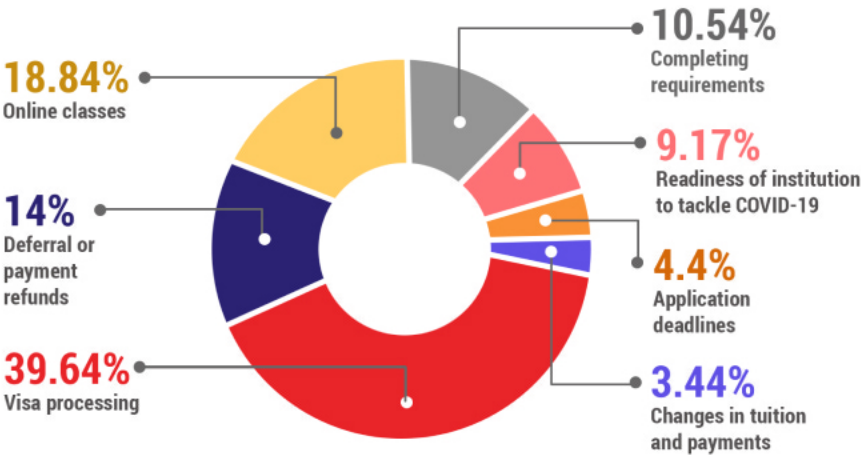


Students' Focal Concerns

39.64% of agents pinpointed visa processing as a top concern for students. Travel bans worldwide quickly escalated as the coronavirus turned into a pandemic, with some countries immediately halting processes for worker or student visas, residence permits, and employment permits.⁵

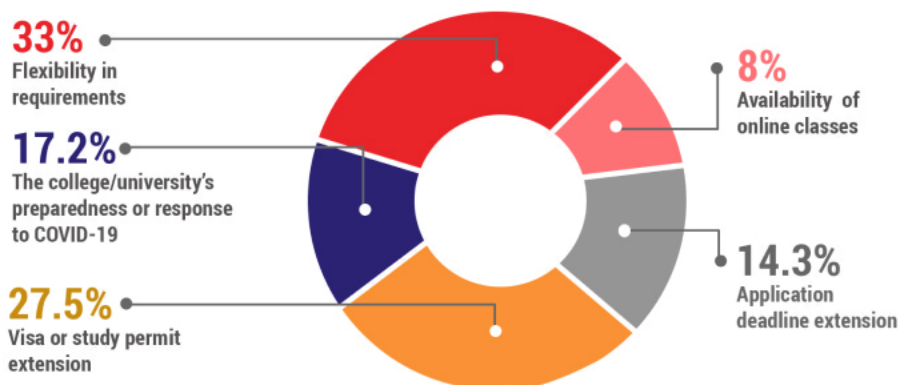
The concerns that rank next are online classes at 18.84% and deferral or payment refunds at 14%.

During COVID-19, what do you perceive as the top concern of students?



In addressing the aforementioned concerns, 33% of agents say flexibility in program application processes can encourage students to continue applying. Next are visa or study permit extensions, reported by 27.5% of agents.

What best eases the concerns of students?

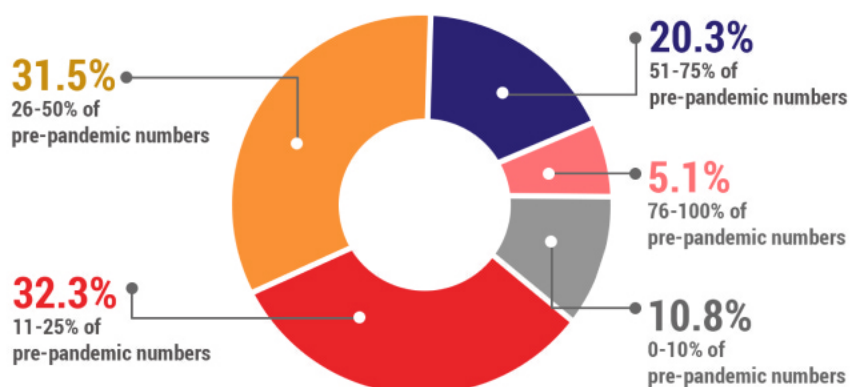


TAKEAWAY: In order to soothe the worries of students and their families, agents are hard-pressed to monitor news and developments from HEIs and their respective governments. Colleges and universities can keep the recruitment process robust through timely information sharing and updates.

Some governments have already launched special services and created exemptions for international students.^{6,7} HEIs in these territories face a great opportunity to engage applicants if they implement fairer admission requirements.

Enrollment Outlook During The Pandemic

What is your projection for the downfall in enrollment numbers in the upcoming intake?



Affirming recent projections of upcoming foreign enrollment numbers, 10.8% of agents believe the upcoming intake will have no more than 10% the number of students before the pandemic.

Only 25.4% of agents have a more positive projection: at least half of pre-pandemic numbers, with 5.1% believing the loss will amount to a quarter of the population at the most.

TAKEAWAY: Pandemic-caused restrictions have marred the possibility of breaking international student population records in major destinations, forecasted just months before the spread of the novel coronavirus. ^{8,9,10}

The presented data suggests the following:

- ✓ Students are still interested in study-abroad programs but have bigger concerns
- ✓ Universities urgently need to create solutions that address students' issues and retain them
- ✓ On-the-ground recruitment agents have a realistic take on forthcoming student numbers, particularly in an unprecedented event like COVID-19

Relationship with Institutions

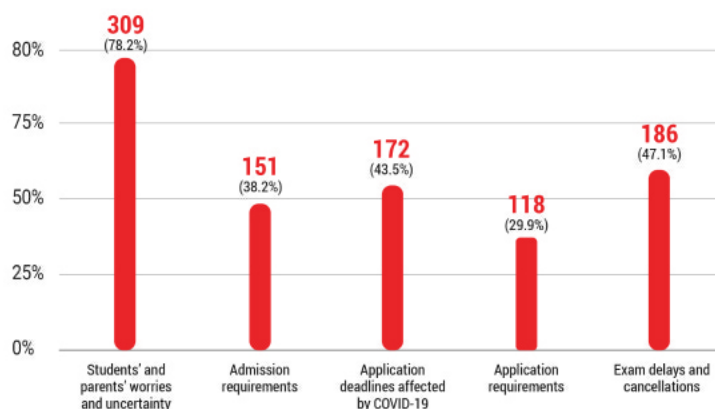
In order to succeed on the ground, agents need to be in close contact with their institution partners as the first to get updates on the upcoming intakes. A healthy working relationship helps make agents feel supported by HEIs and confident enough to accelerate recruitment measures as needed.

Agents' Institutional Concerns

Of the agent respondents, 78.2% believe that addressing students' and parents' worries should be a top priority for universities. This is likely relative to students' health and safety without a COVID-19 vaccine and general resistance toward online classes, rendering them unable to use institutional resources while still paying for their full and, for some, increased tuition fee.

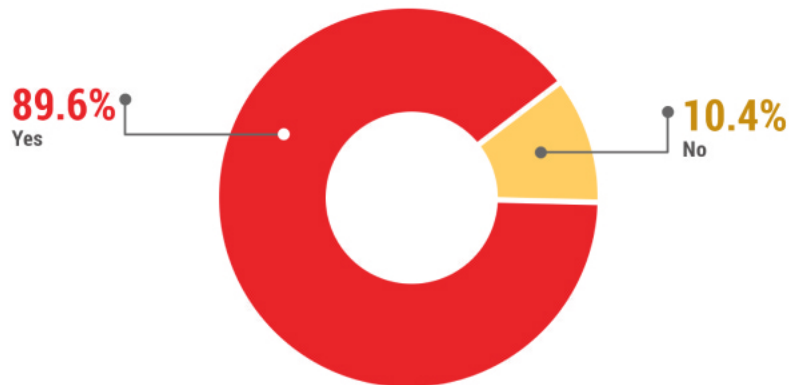
Meanwhile, 47.1% of agents hope HEIs will delay or cancel exam dates, while 43.5% would like to see application deadlines extended. Another 38.2% believe there should be increased scholarship opportunities.

What challenges would you like to see HEIs address during COVID-19?



TAKEAWAY: The datum suggests that students are willing to enroll in online classes, but with reservations about paying the same fees as in conventional classroom instruction. With their personal lives and livelihood also ravaged by the pandemic, many may only choose to study abroad if significant financial support is available.

Are you satisfied with how HEIs have responded to the COVID-19 situation?

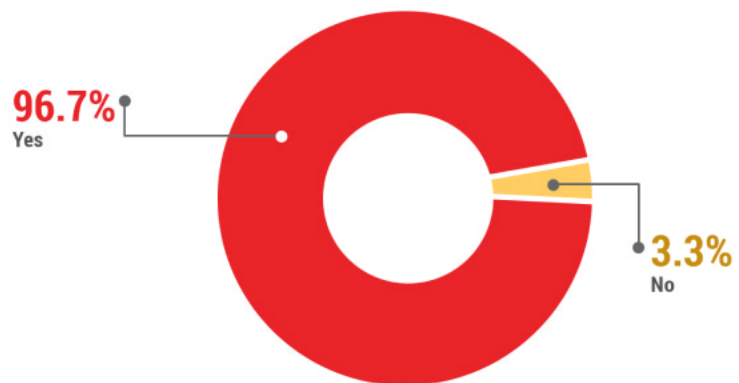


89.6% of agents are satisfied with how HEIs have been responding since the declaration of the pandemic, while others feel it can be improved with the following:

1. Lessening admission requirements
2. Adjusting tuition cost and payment schedule
3. Offering financial scholarships or discounts
4. Lobbying with immigration bodies to ease visa restrictions
5. Accepting online IELTS exam results
6. Announcing a delayed intake for October to January
7. Streamlining student admission updates
8. Increasing student care for those stranded offshore or forced out
9. Issuing conditional offers

Communication Between Agents And Institutions

Do you feel that you are getting sufficient and timely updates from HEIs?



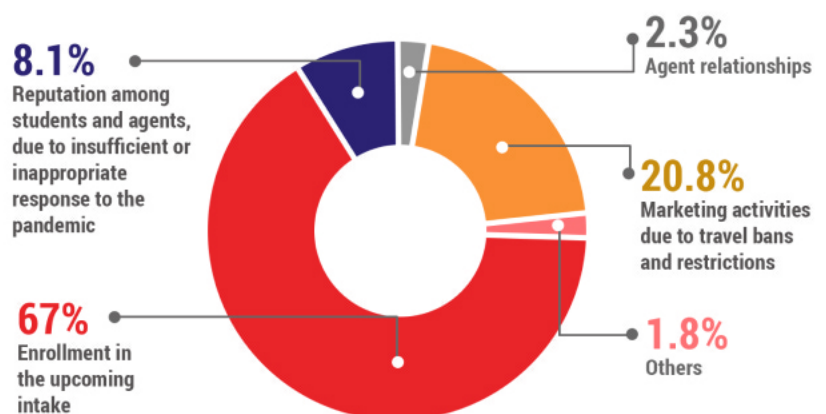
A staggering 96.7% of agents feel that they are getting sufficient and timely updates from colleges and universities during the pandemic.

TAKEAWAY: The current situation has brought academic institutions to a level of communication with their agents that should be sustained through and beyond the global health crisis. The results also suggest that agents expect a resurgence in study-abroad interest.

Contrary to prevalent opinion, online classes could have a democratizing effect on international education, resulting in the emergence of accessible transnational education.¹¹ The success of virtually involved classroom instruction now can create sustainable opportunities in the future of HEIs.

Consistent with news and research reports, 67% of agents believe that enrollment in the upcoming intake will be the biggest challenge for HEIs during the COVID-19 pandemic, followed by stalled marketing activities as reported by 20.8% of agents.

What do you think will be the biggest challenge for HEIs during COVID-19?

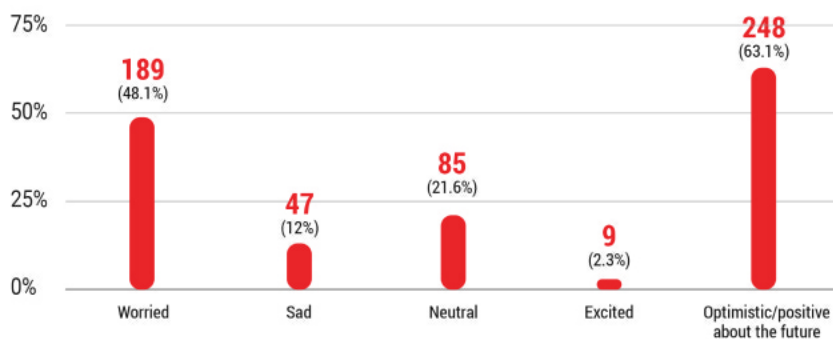


Post-Pandemic Outlook and Prospects

With prevailing mobility and marketing restrictions getting in the way of meeting prospective students, giving assistance to agents on the ground will become more vital. Through awareness of their needs and well-being, agents can receive the appropriate online or limited in-person training, which can continue to enrich their recruitment practice after the pandemic.

Agent Well-Being And Outlook

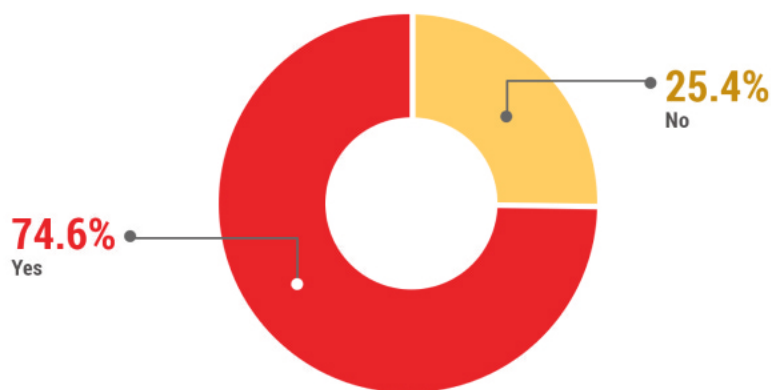
How have you been feeling since the pandemic started?



On how agents have been feeling since the pandemic started, 63.1% of agents say that they are optimistic about the future, while 48.1% are worried. Further, 21.6% of agents feel neutral and 12% feel saddened by the recent events.

74.6% of agents believe activities will return to normal within the year with in-person recruitment activities.

Do you think your agent activities will return to normal within this year?



TAKEAWAY: Though international travel will continue to be difficult, travel restrictions within countries are more likely to ease sooner. This will enable agents to resume their normal practice and engage students face-to-face.

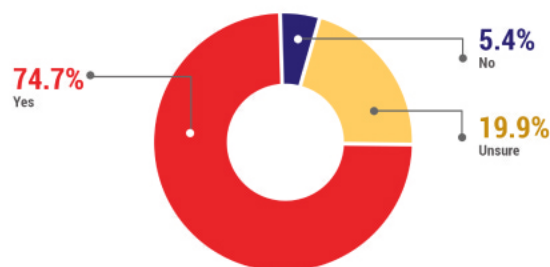
Among the 25.4% of agents who believe things are not going to return to normal soon, their reasons included the pressing need for universities to have clarity in intake plans and schedules, along with the uncertainty of students and their families.

Agents' Readiness For Virtual Education Fairs

Findings show 74.7% of agents are ready to run virtual education fairs, which had been well-attended by prospective students and industry professionals in the pre-pandemic environment. With assistance, partnerships, and coordination with HEIs, they may create greater opportunities to meet prospective students.

Of the remaining respondents, 19.9% are unsure and 5.4% are not ready.

Are you ready to run virtual education fairs and recruit online?



TAKEAWAY: Agents display great willingness to execute virtual recruitment strategies. If virtual fairs are mastered during this period, they may be used in tandem with physical fairs in the future, widening their reach while minimizing costs. ¹²

For these efforts to make an impact, colleges and universities need to have a clear vision of the upcoming intakes and what they can offer students.

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PARTNER
INSTITUTIONS



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AFFILIATE AGENTS
AROUND THE WORLD



50,000
STUDENT APPLICATIONS
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What We Do

We strive to make international education accessible to all.

MSM operates on a performance-based model, ensuring low risk and maximum outcomes for our partners. As we take care of everything from agent management to on-ground and digital marketing, colleges and universities welcome more international students on campus and reap the diversity and financial rewards.

For Institutions:

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- Market Research and Expansion
- Lead Generation and Digital Marketing
- Agent Management and Networking Events
- A Wealth of Back Office Support Services

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