



INNOVATION IN EDUCATION



AGENT TRAINING
EDUCATION AGENT TRAINING COURSE

PIERONLINE.ORG

THE AVERAGE AGENCY

Context:

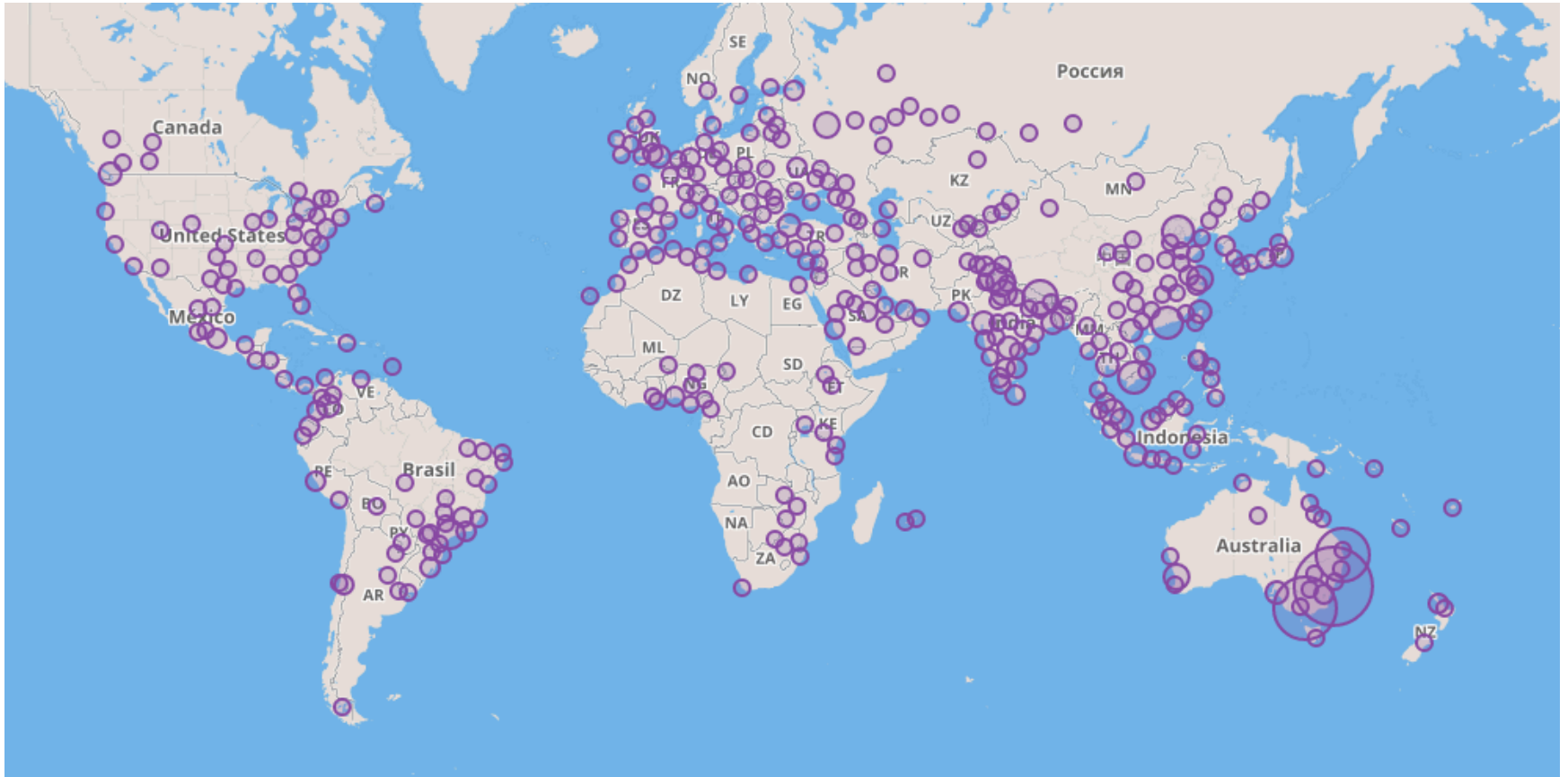
- 7,900 Australian
- 16,000 worldwide
- < 200 major multi-national companies
- 40,000 Australian counsellor workforce

Agency use (% of students recruited by agents):

- Australia 70%
- US 20%
- UK and Canada 40%

Sources: IEAA Study, Bridge Report 2016, PRISMS, PIER Network 39.5K

THE PIER NETWORK – AGENCY OFFICES WORLDWIDE



THE AVERAGE AGENCY COUNSELLOR

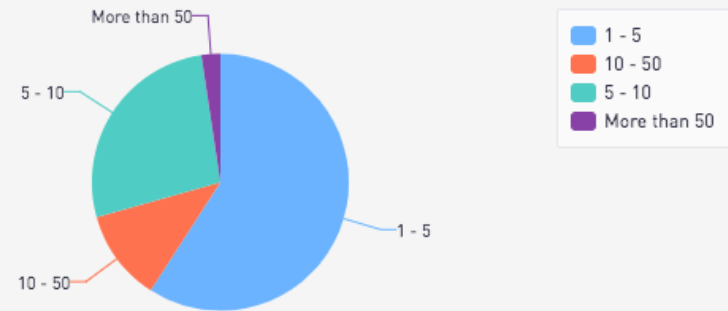
- The individual has been working for 3.5 years
- More likely to have just commenced than a long-term employee
 - › 35% have been working less than a year as an agent
 - › 9% have been working ten years or more
- 98% recruit for only one destination

THE AVERAGE AGENCY OFFICE

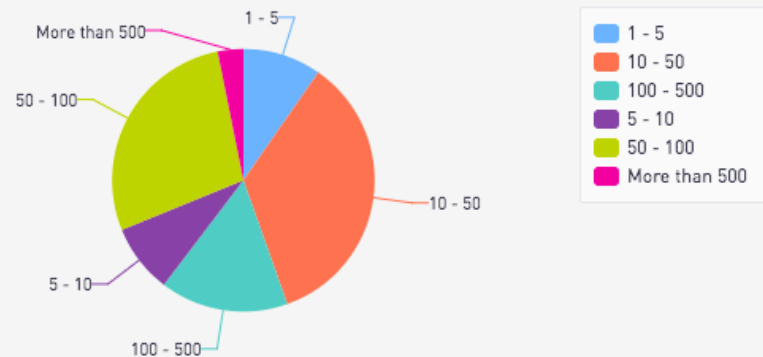
- The office has 4-6 counsellors
 - Significantly more likely to work in an office of 1-10 counsellors (86%) than over 50+ (2%)

- The office recruits around 74 students each year
 - 63% recruit 10-100 students
 - 19% recruit 100+ students

No. counsellors per agency office

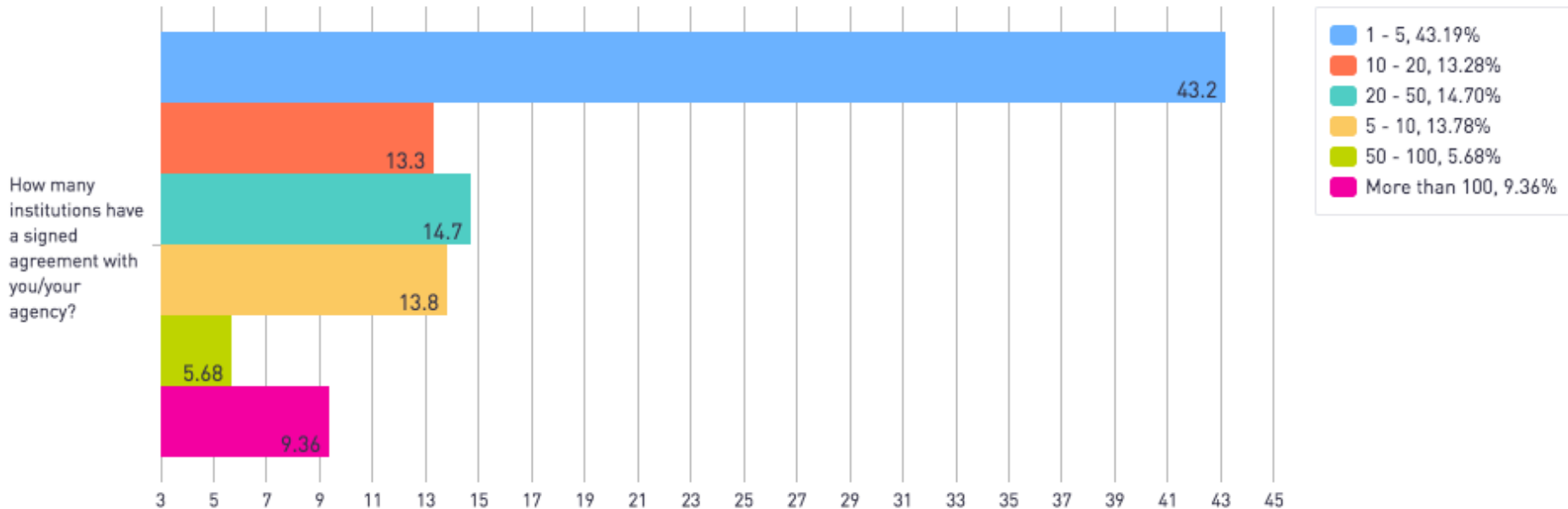


Students recruited per agency



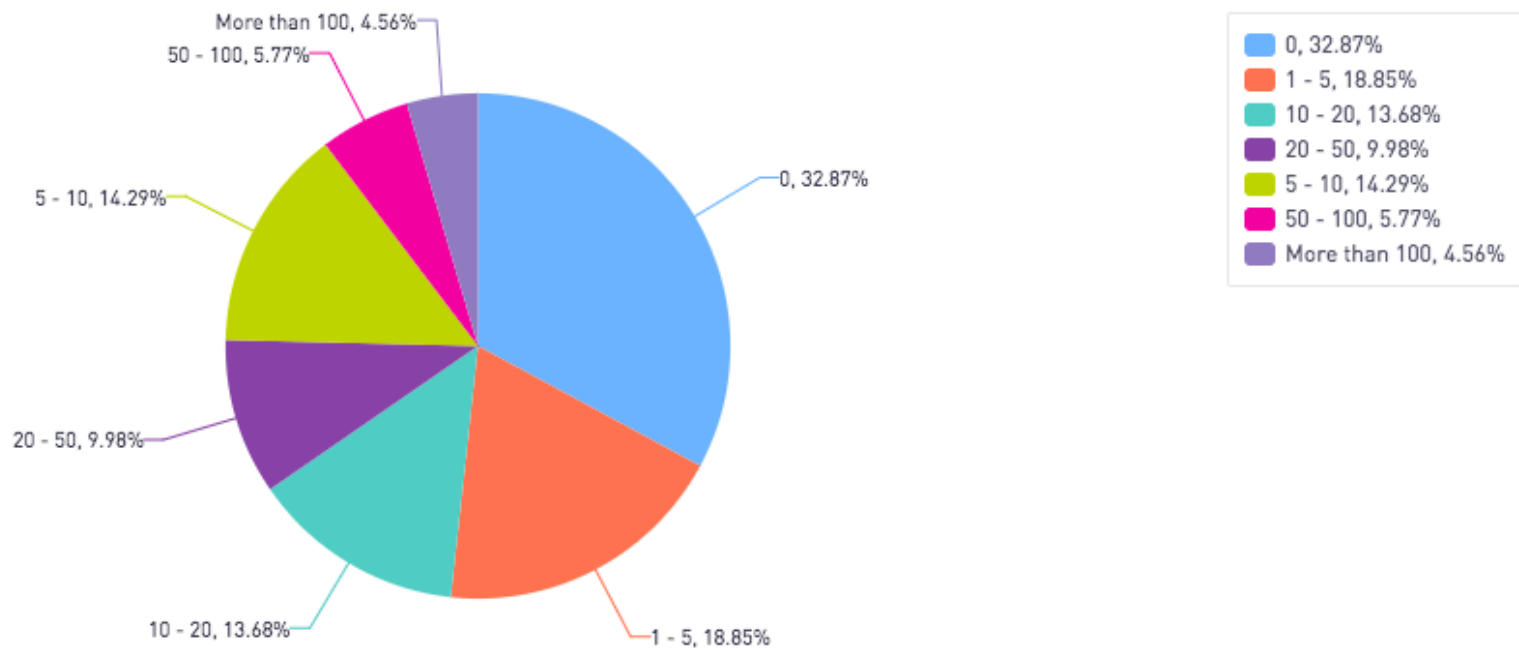
RECRUITMENT OPERATIONS

- Each agency office has a formal written agreement with 23 institutions on average
- Indian-based agency offices have the highest no. at 40 on average

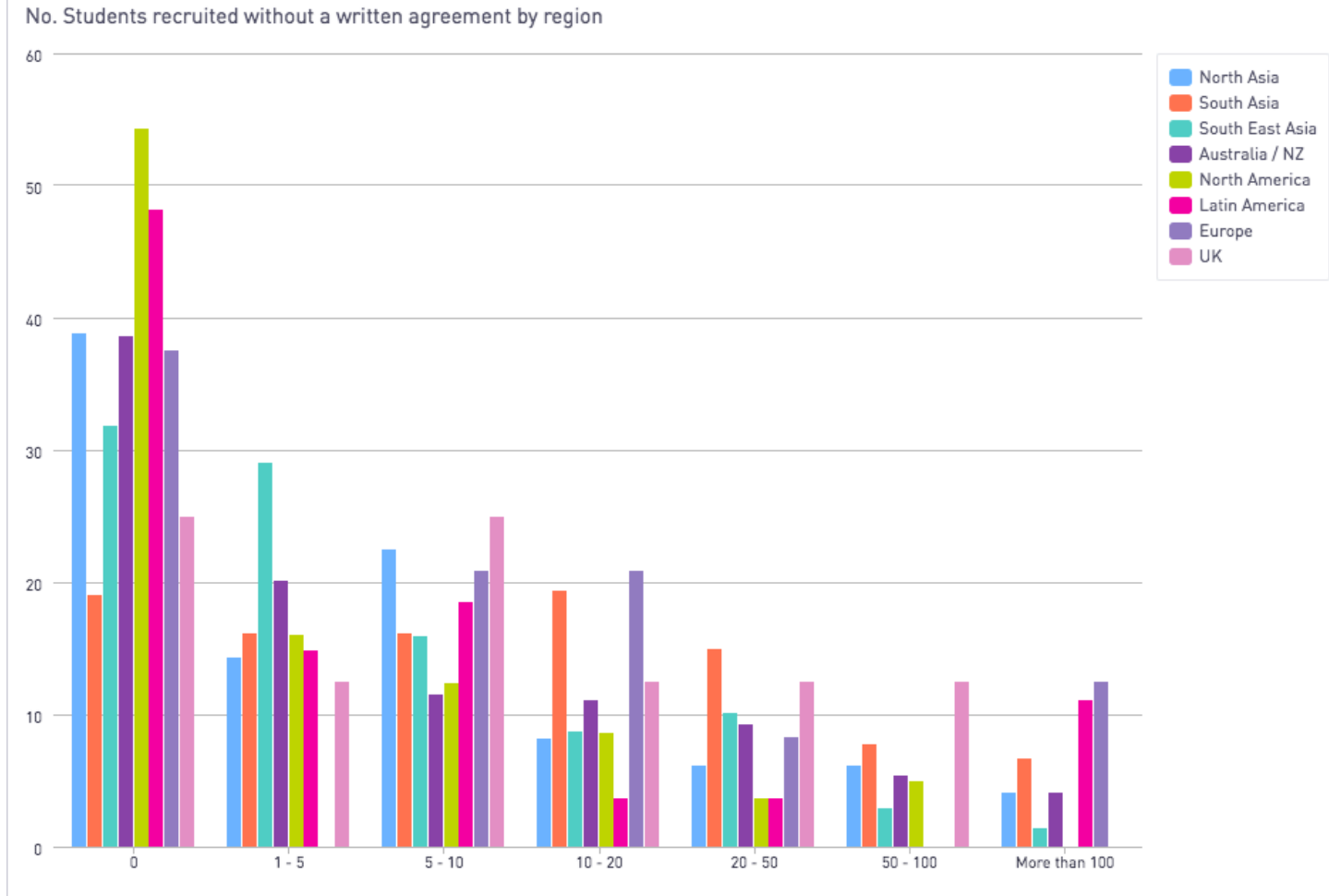


WRITTEN AGREEMENTS AREN'T THE WHOLE STORY

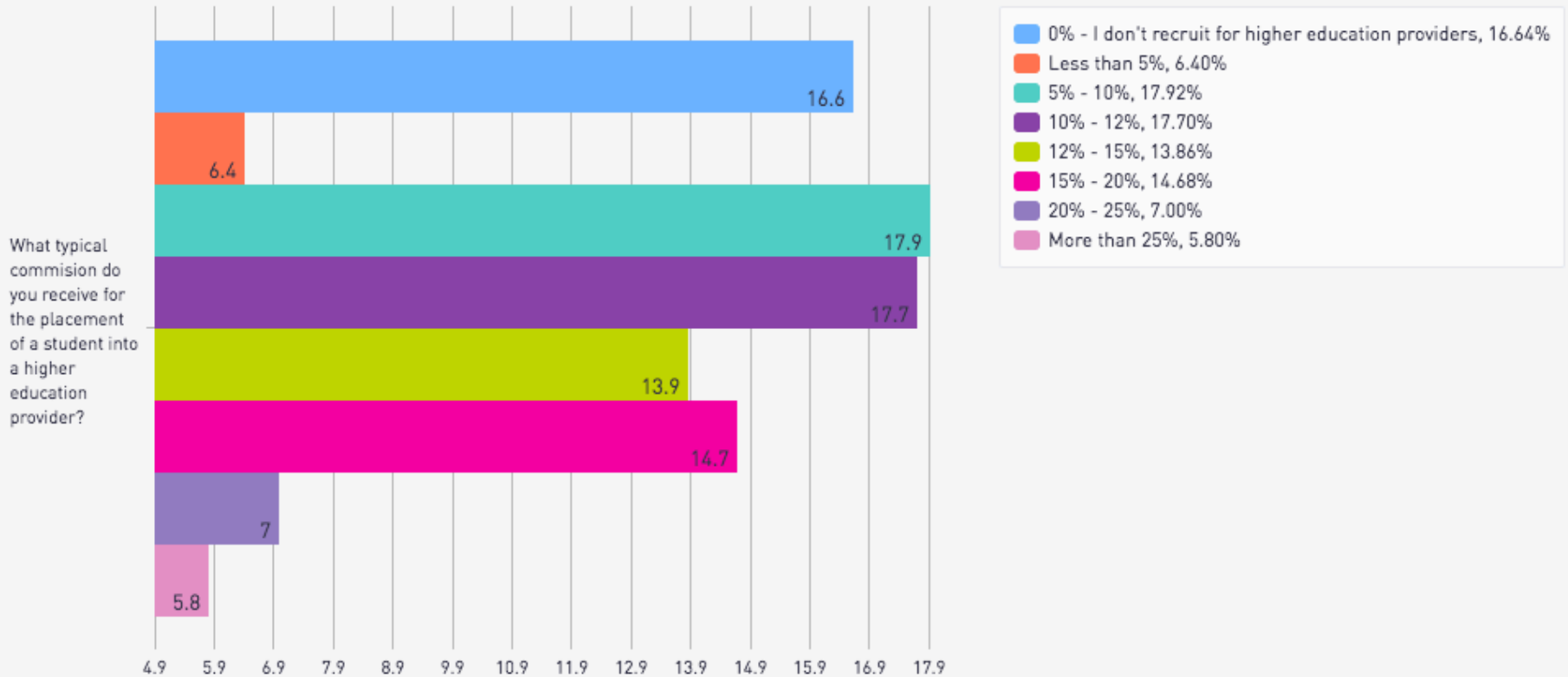
Students recruited without a written agreement



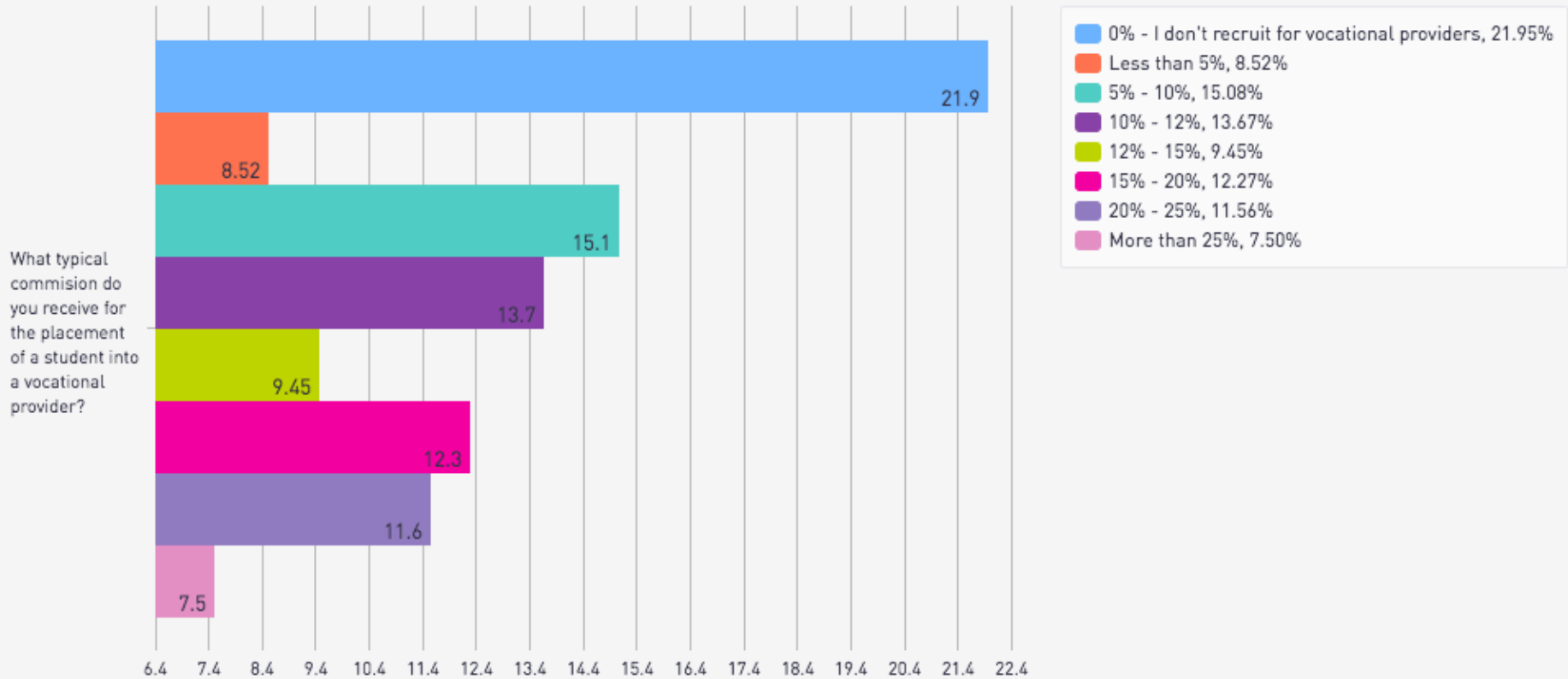
WRITTEN AGREEMENTS AREN'T THE WHOLE STORY



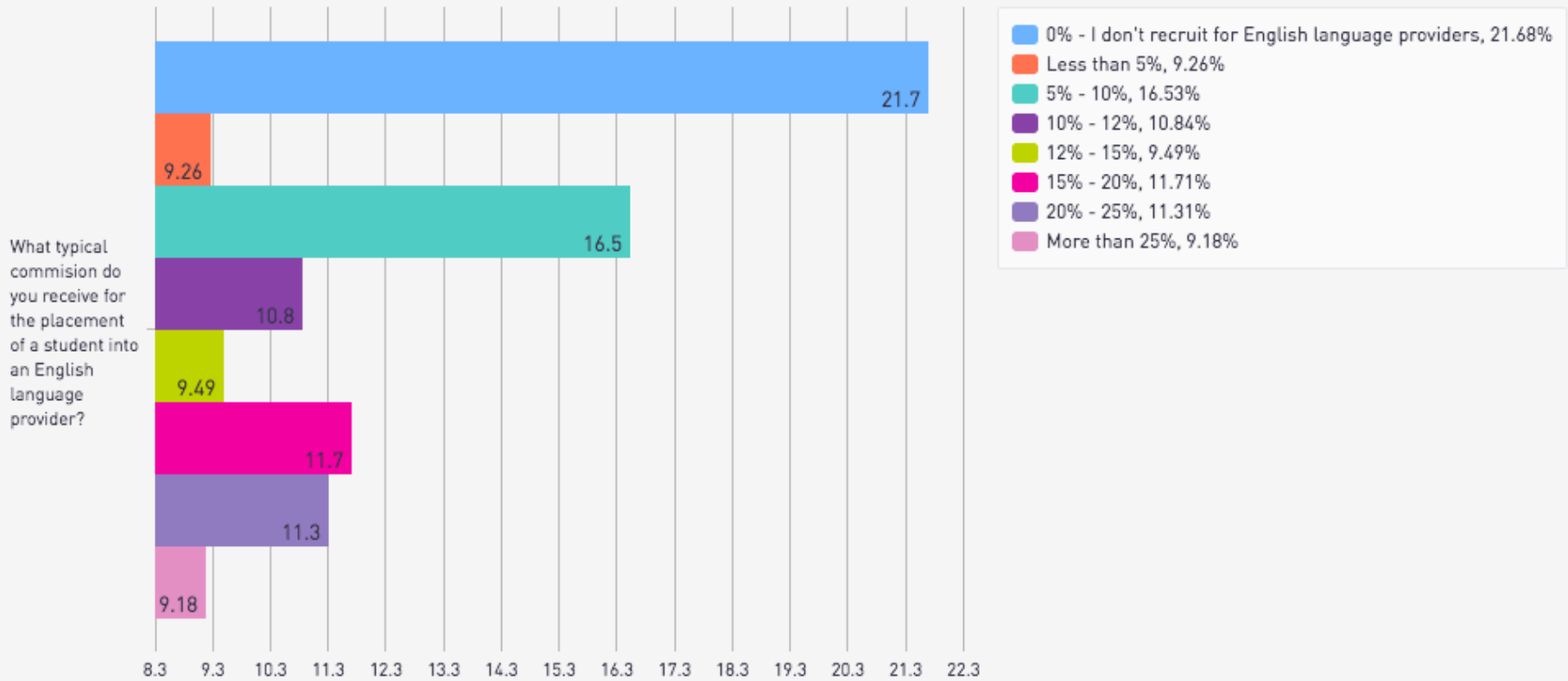
COMMISSION RATES – HIGHER EDUCATION



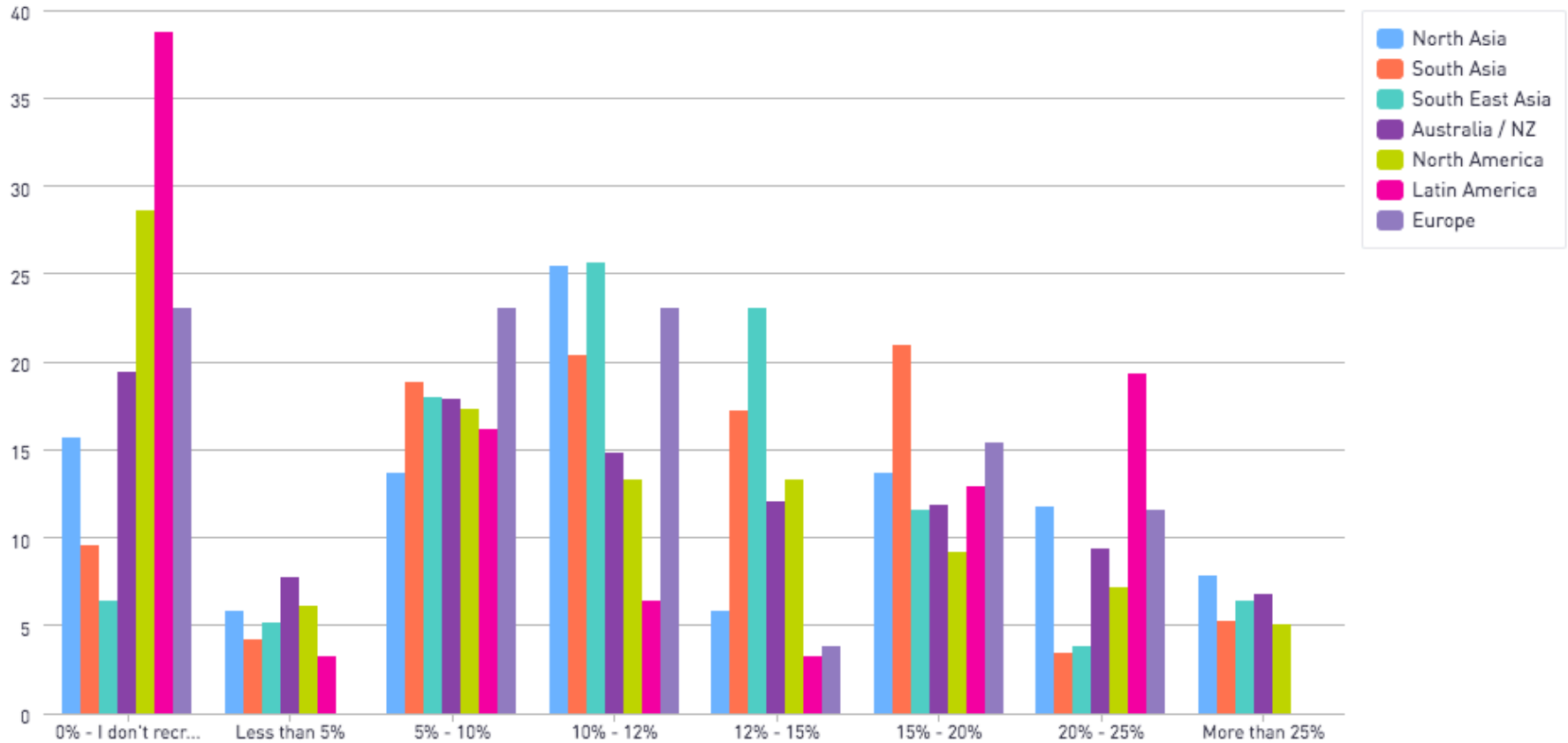
COMMISSION RATES – VOCATIONAL EDUCATION



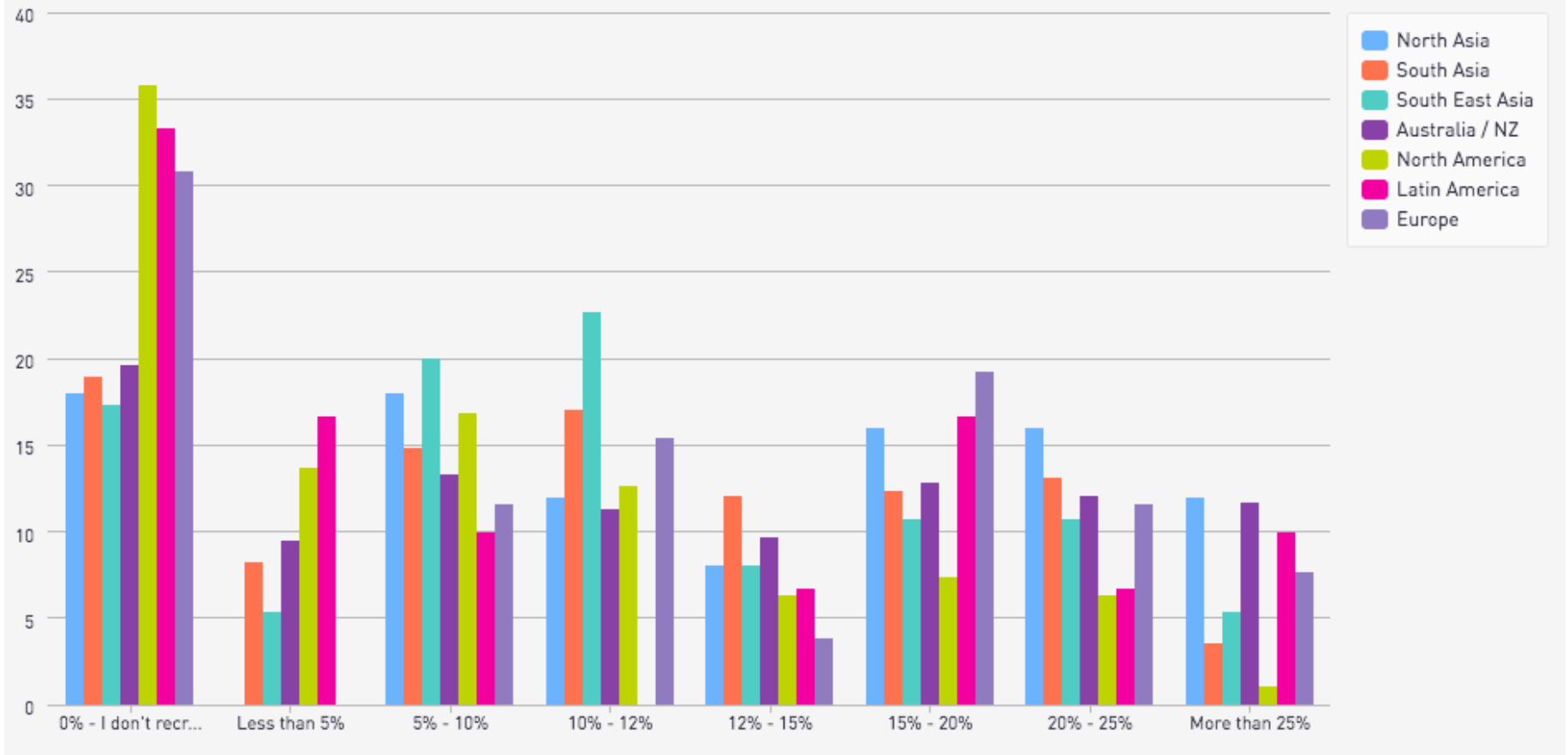
COMMISSION RATES – ENGLISH LANGUAGE



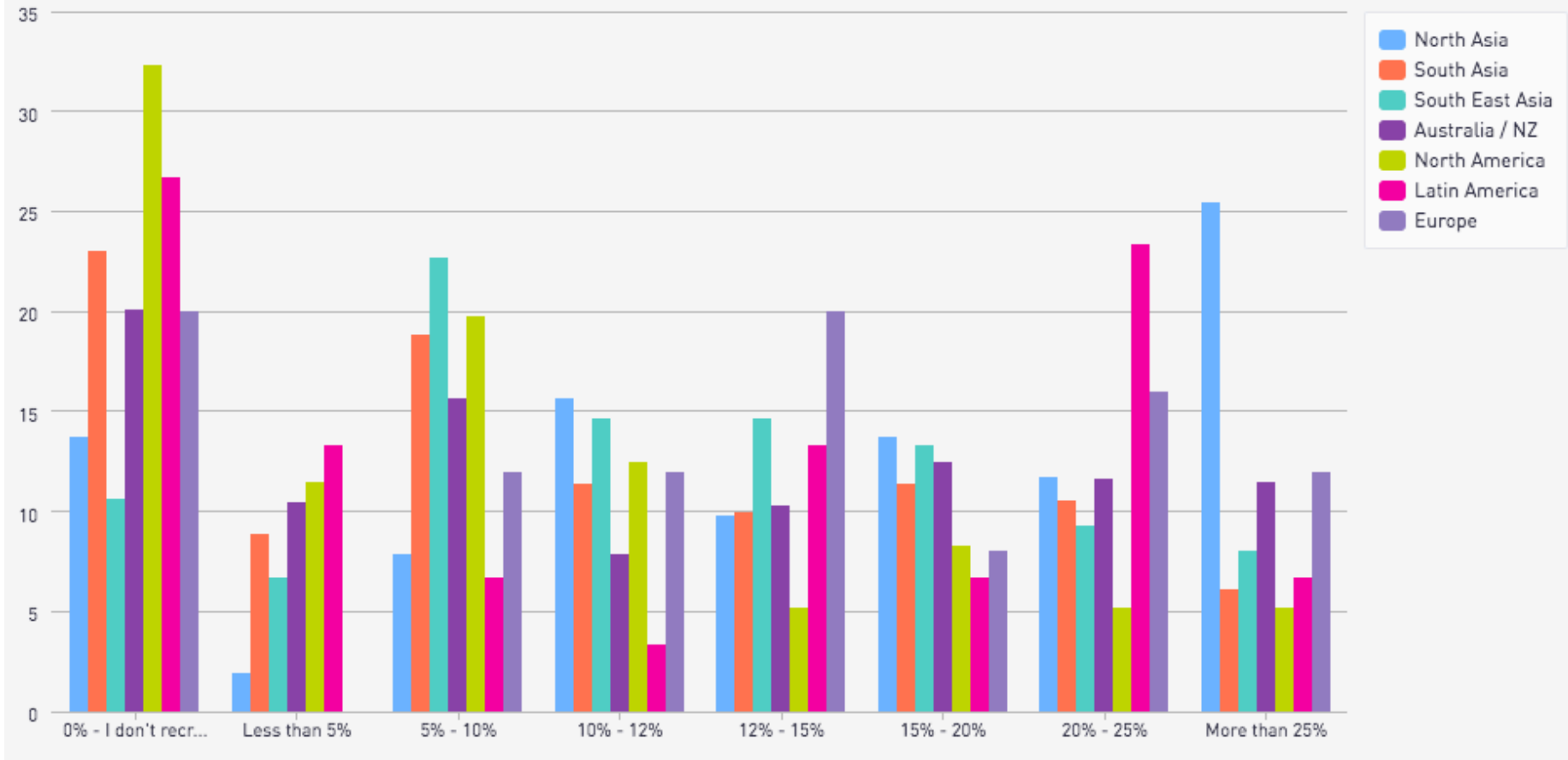
COMMISSION RATES – HIGHER EDUCATION BY REGION



COMMISSION RATES – VOCATIONAL EDUCATION BY REGION



COMMISSION RATES – ENGLISH LANGUAGE BY REGION

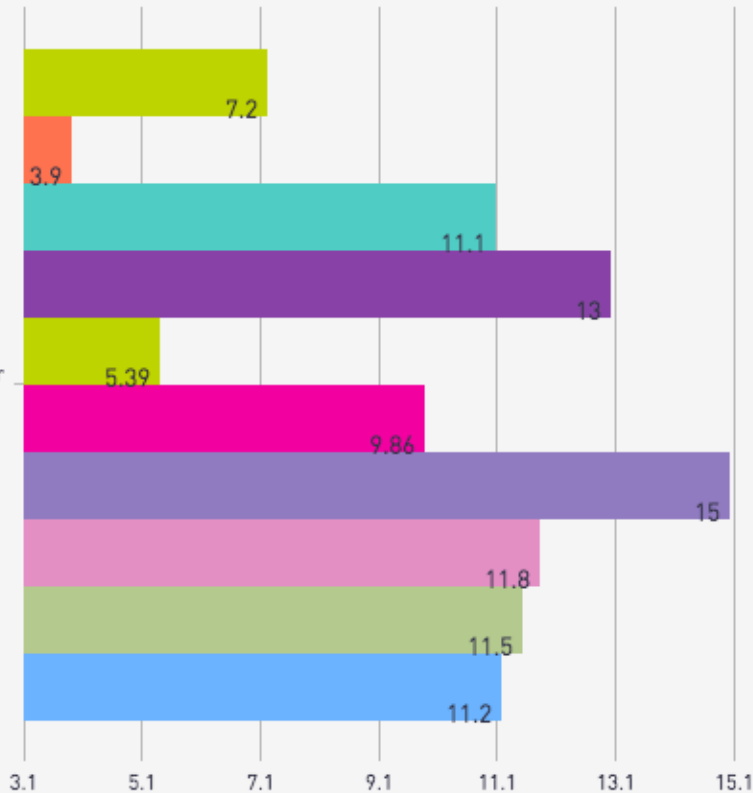


COMMISSION RATES – POINTS TO NOTE

- English Language pays highest commission but also more likely to pay lowest
 - 26% of agency offices receive more than 20% commission
 - 12% receive less than 5% commission; compared to VocEd (11%) & HE (8%)
- HE lowest commission
 - 50% receive above 12% commission
 - 15% receive more than 20%
- Australian-based agent offices receive best commission overall
 - Receiving above 20% commission
 - » Higher Ed – 20% of respondents
 - » VET – 29% of respondents
 - » ELICOS – 29% of respondents

WHAT WORRIES THE COUNSELLOR?

Please select your top 3 key concerns and/or threats to your business: (select up to 3)



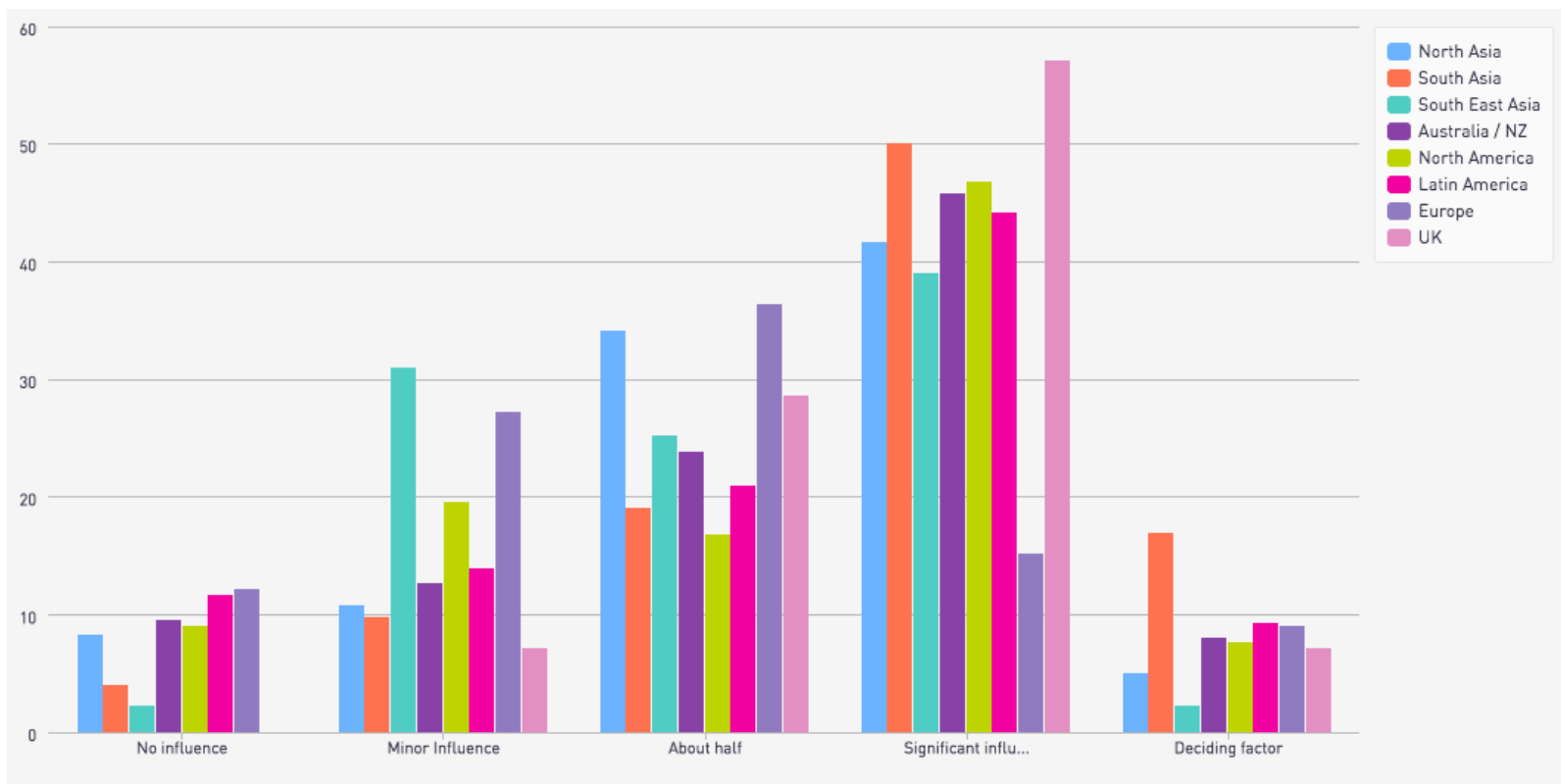
- Currency fluctuations, 7.20%
- Disruption to the flow of people across borders, 3.90%
- Late or non-payment of commission, 11.06%
- Legislative changes providing more barriers to recruitment, 13.03%
- Provider closure/bankruptcy, 5.39%
- Restrictions on places for international students in provider's programs, 9.86%
- Student dissatisfaction with provider or studies, 15.03%
- Students poached by other providers and/or agents, 11.83%
- Students providing fraudulent documents, 11.53%
- The integrity and/or quality of other education agents, 11.17%

WHAT WORRIES THE COUNSELLOR: BY REGION

Concern	
Central Asia	Student dissatisfaction with provider or studies
East Asia	Student dissatisfaction with provider or studies
Europe	Student dissatisfaction with provider or studies
Middle East	Currency fluctuations
North America	Legislative changes providing more barriers to recruitment
South America	Currency fluctuations/Legislative changes providing more barriers to recruitment
South Asia	Students poached by other providers and/or agents
South East Asia	Student dissatisfaction with provider or studies
West Africa	Currency fluctuations

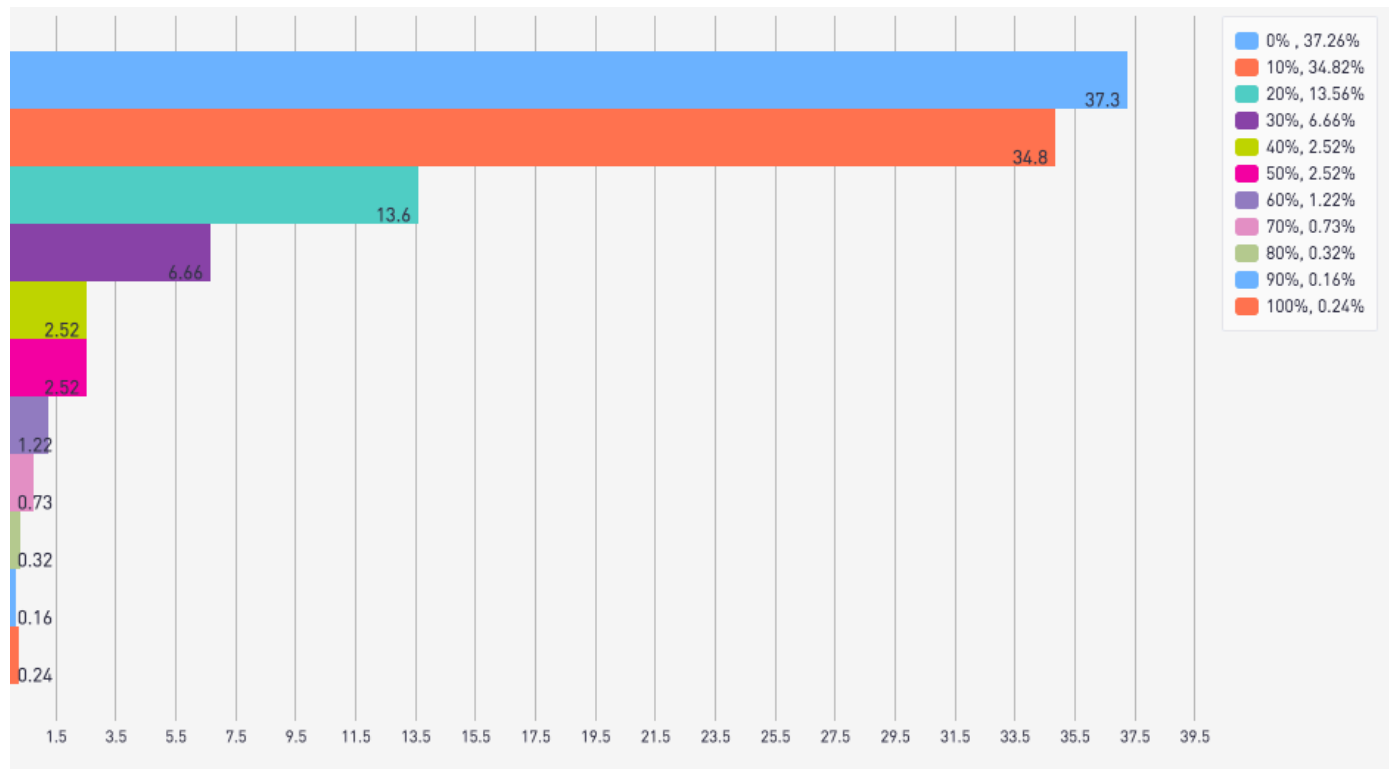
STUDENT CONCERNS

- The influence of post study work rights



STUDENT DISAPPOINTMENT

- Proportion of students who make a complaint





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