ICEF Agent Voice 2025

Gain a global perspective on international student recruitment with insights from the 2025 ICEF Agent Voice survey.

Introduction

Launched in 2020, ICEF Agent Voice is an **annual survey** collecting the **perspectives of student recruitment agents** across the globe.

Agents tend to see **shifts in student demand** and priorities sooner than others. Their observations are thus invaluable for educators around the world.

The current survey ran from April until September **2025** and covers **6 key topics**.

This is the largest and most diverse survey of its kind, gathering over 1200 agent responses.

Key Topics

1. Recruitment expectations & student decision-making factors
2. Student interest & visa approval rates
3. Enrolment challenges & institutional support
4. Online programmes
5. Agency operations & remuneration

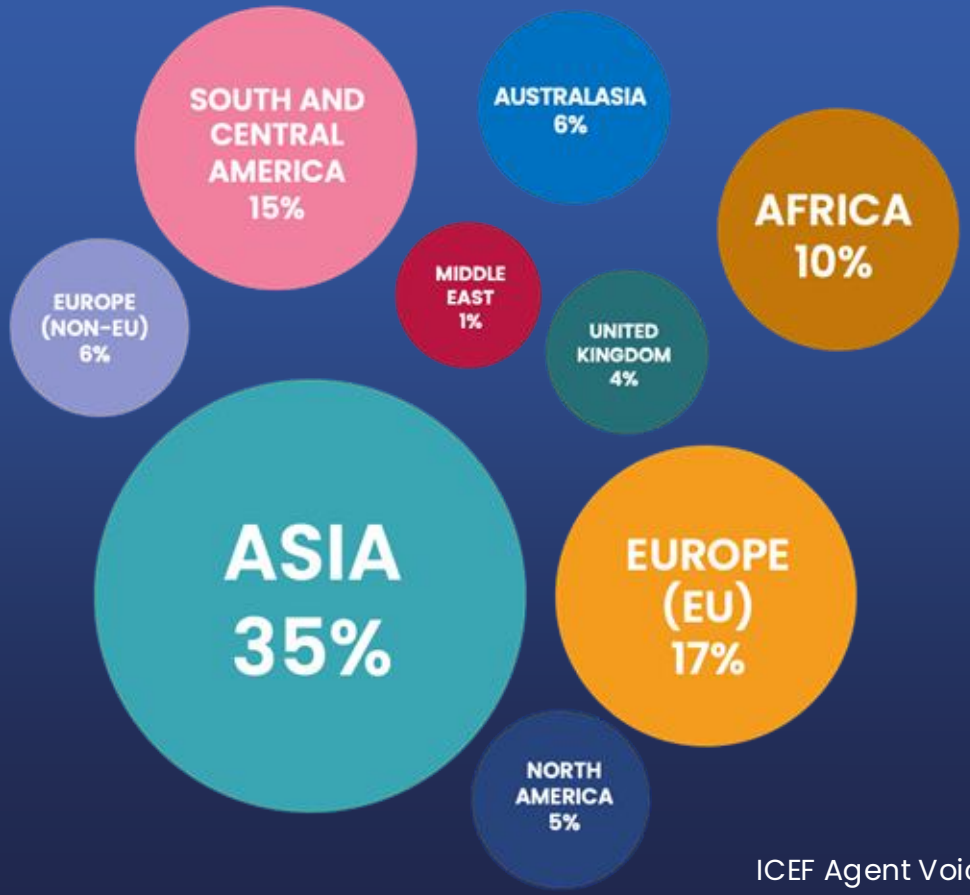
1225

Agents

113

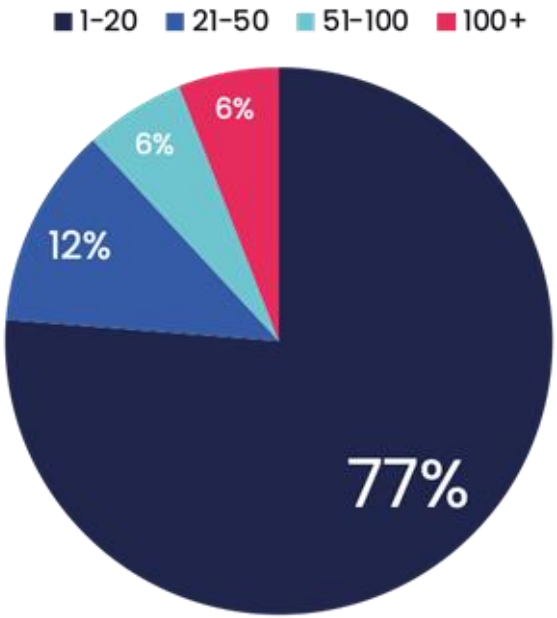
Countries

Across
9 regions



Student enrolment: Relative size & scale of agencies

How many students have you recruited **in the last 12 months** for the below study levels?



ICEF Agent Voice 2025

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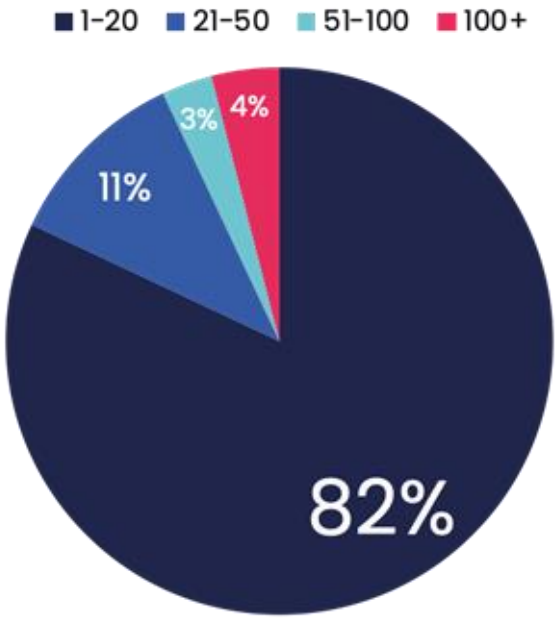
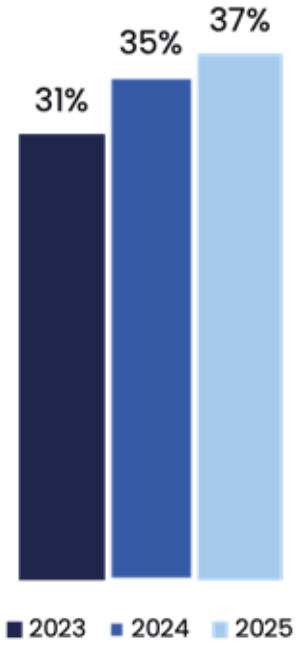


Keypoint 1.

Recruitment expectations & decision-making factors

Less optimism this year for enrolment growth

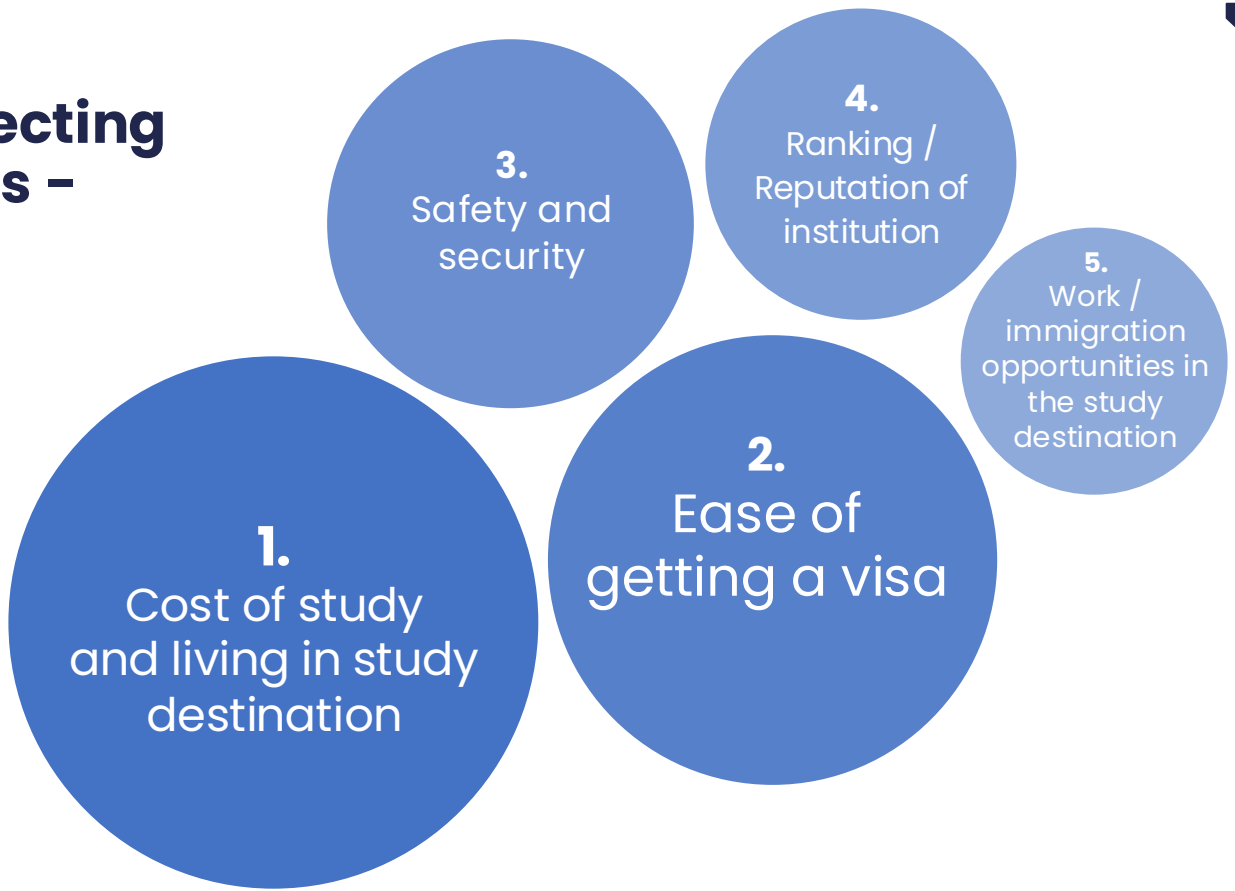
Proportion of agents anticipating a decline in enrolments **2023-2025**



ICEF Agent Voice 2025 • *Recruitment expectations & decision-making factors*

Top 5 factors affecting student decisions – globally

What factors do your students consider most crucial when making decisions about their study abroad plans?

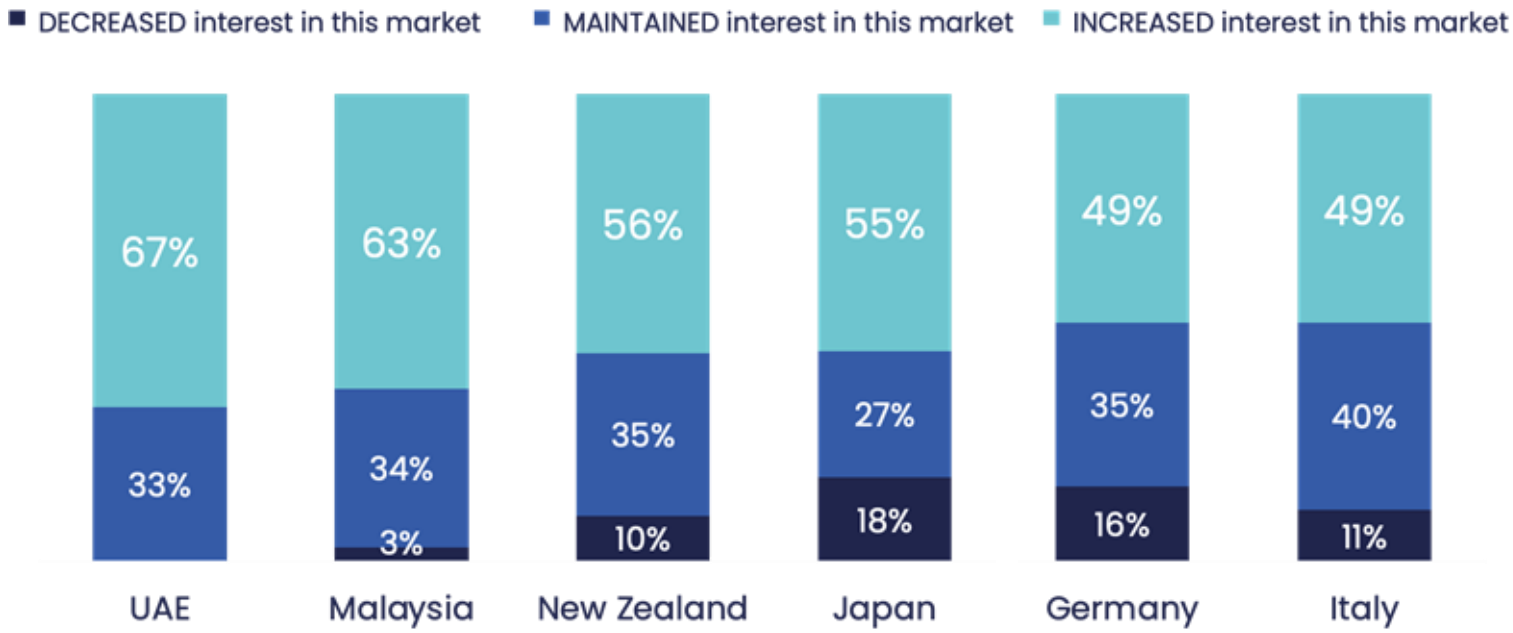


Keypoint 2.

Student interest & visa approval rates

Student interest in specific countries

Over the **past year**, how has students' interest in the following study destination countries changed?



Top 3 decreased interest

Student interest in specific countries

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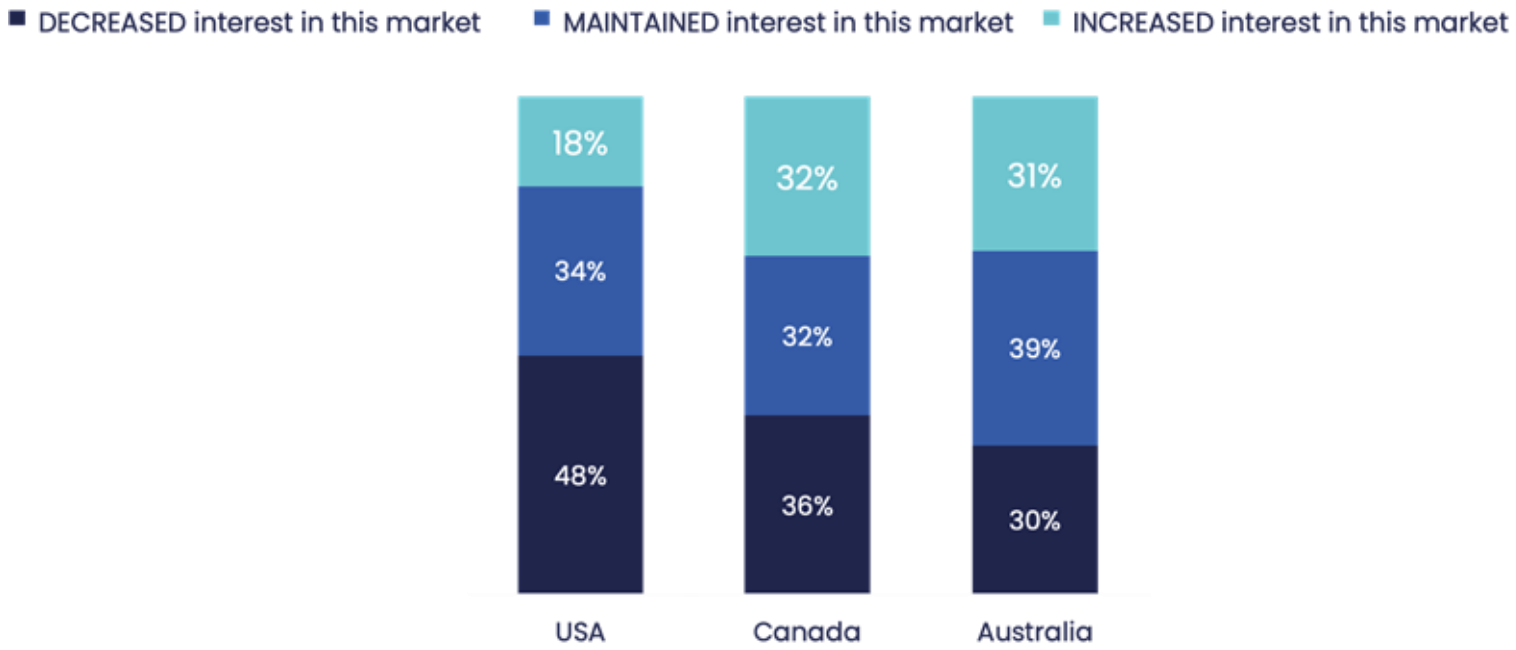
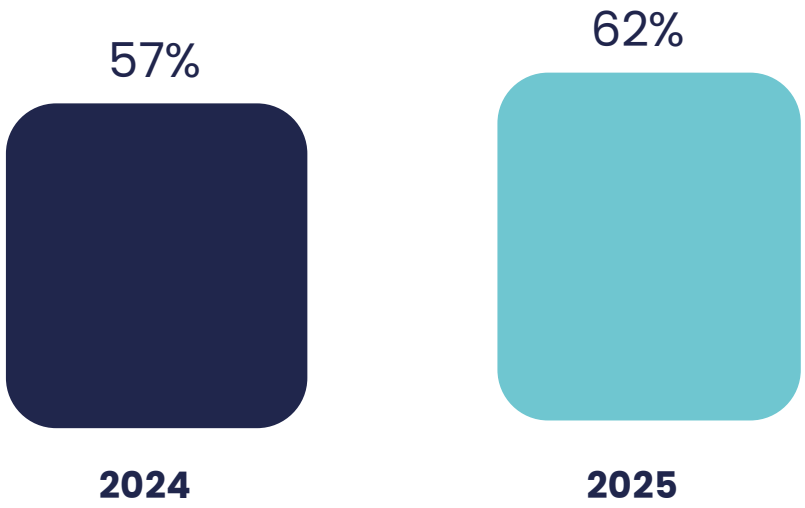


ICEF Agent Voice 2025 • *Student interest & visa approval rates*

Visa approval: Approximately what percentage of student **visa applications** are approved?



United Arab Emirates

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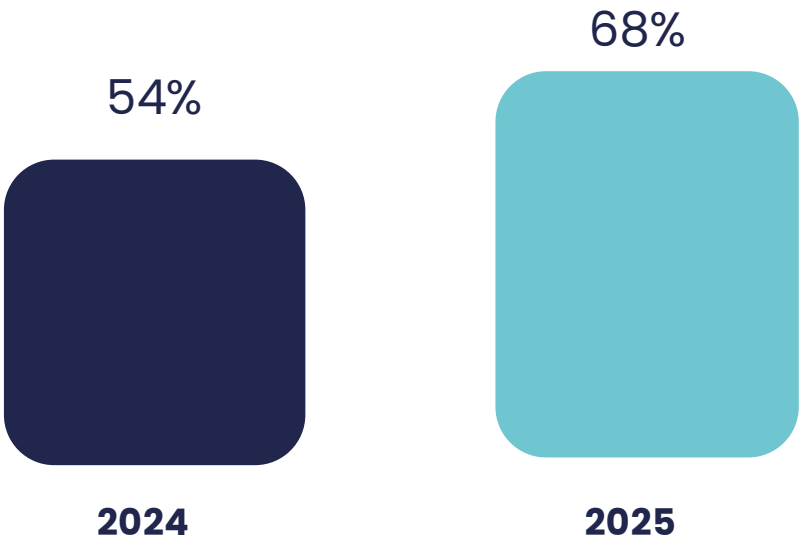

Malaysia

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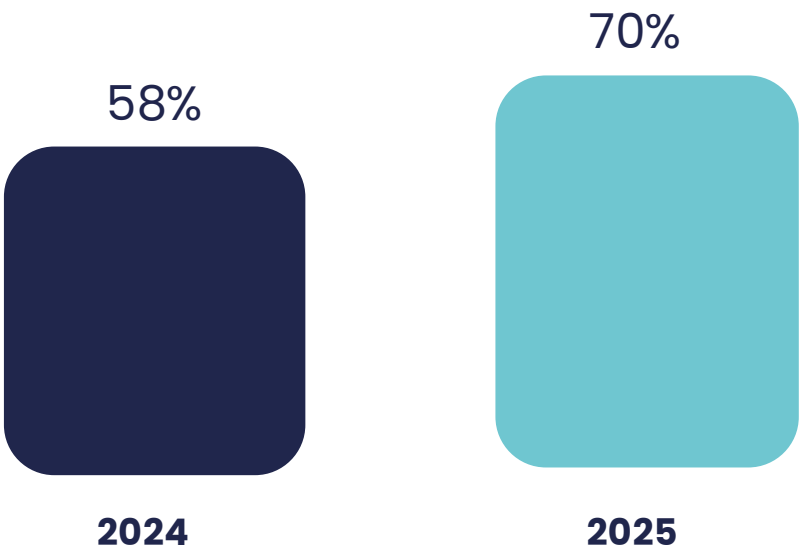

New Zealand

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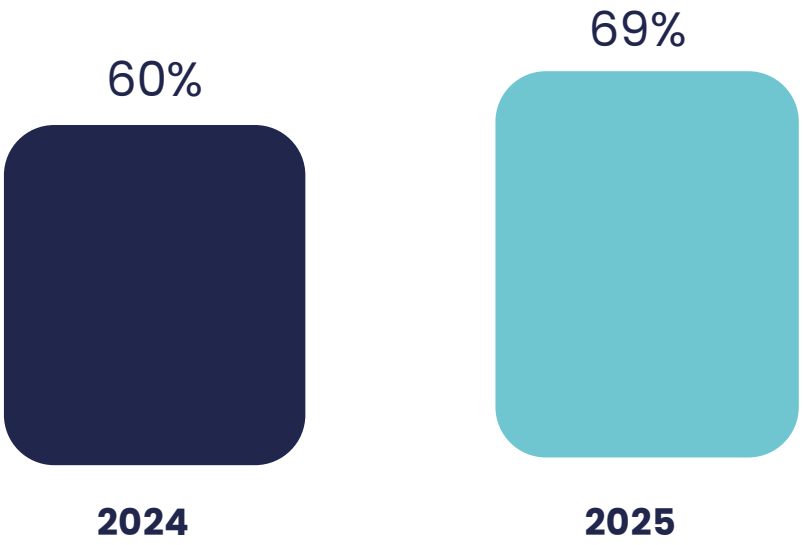

Japan

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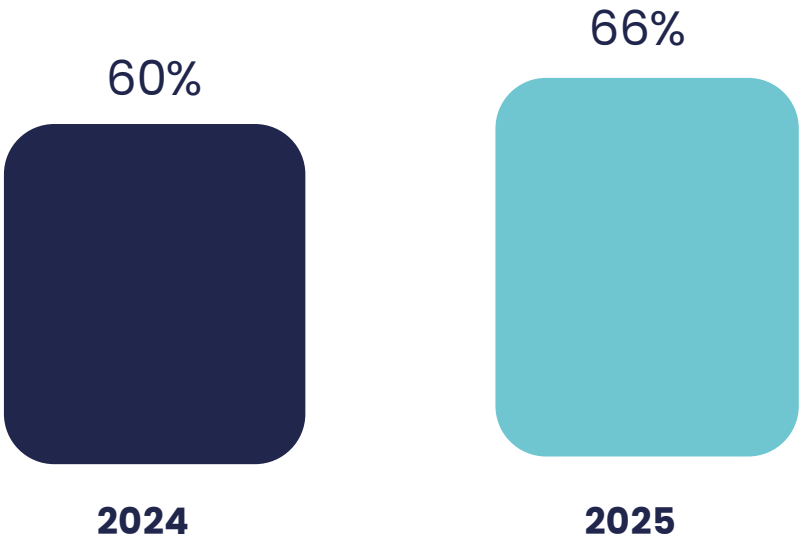

Germany

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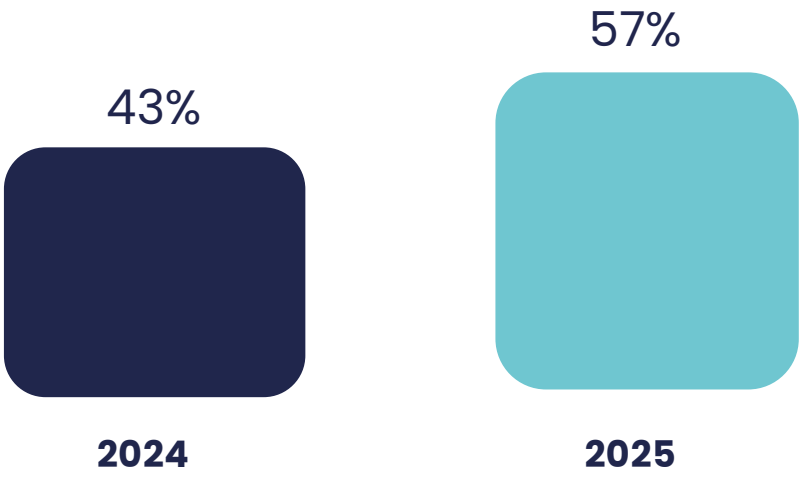

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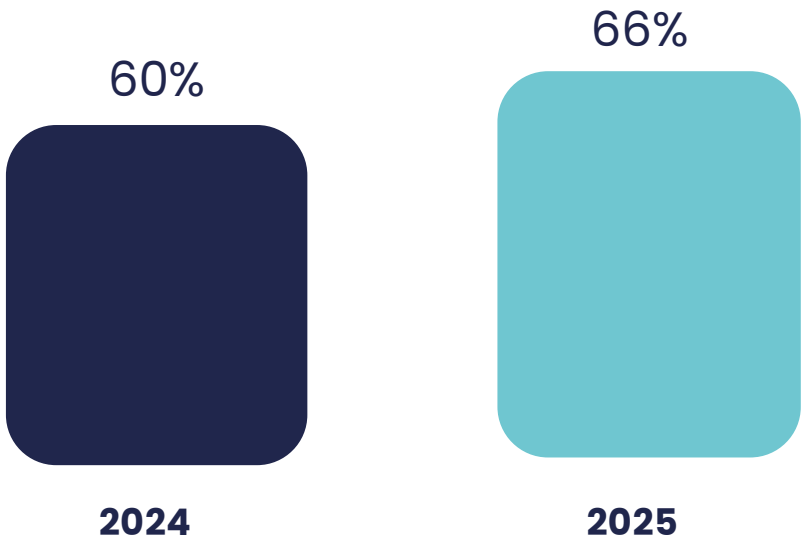

Canada

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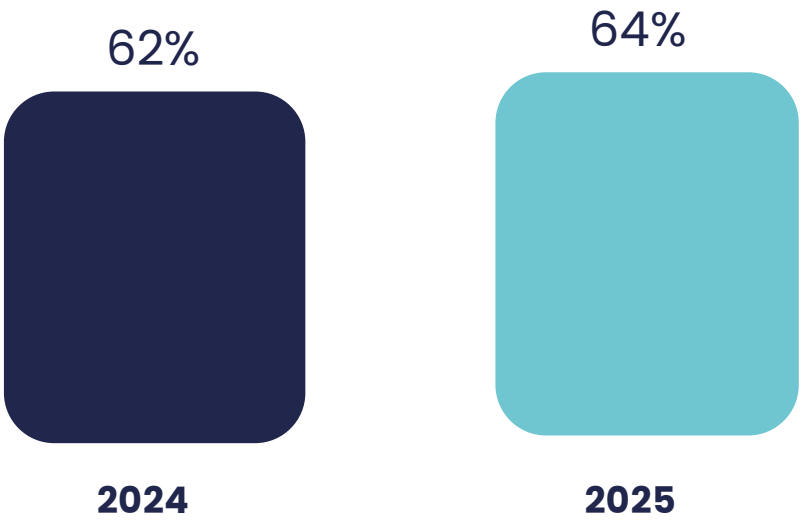

Australia

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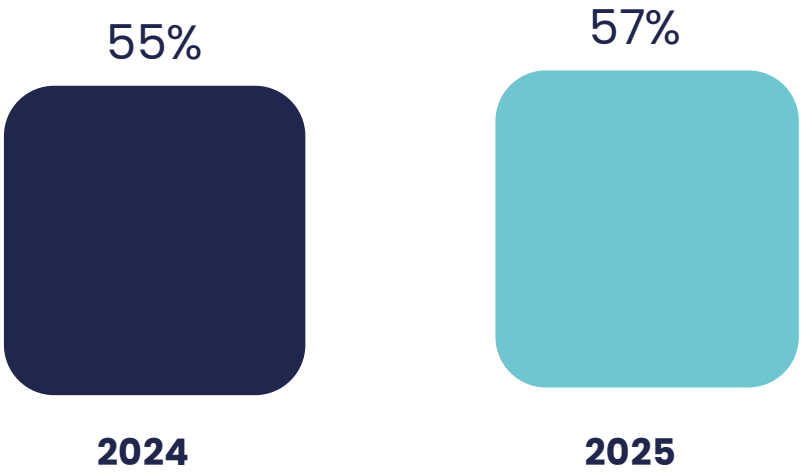

Spain

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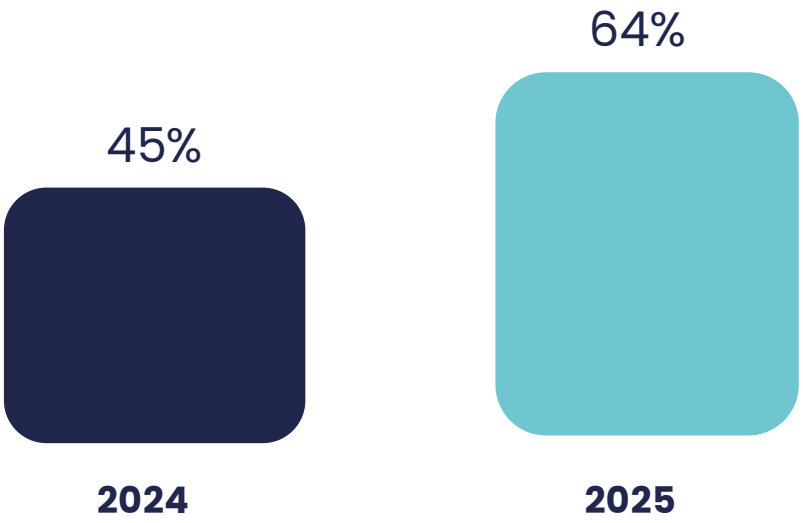

Ireland

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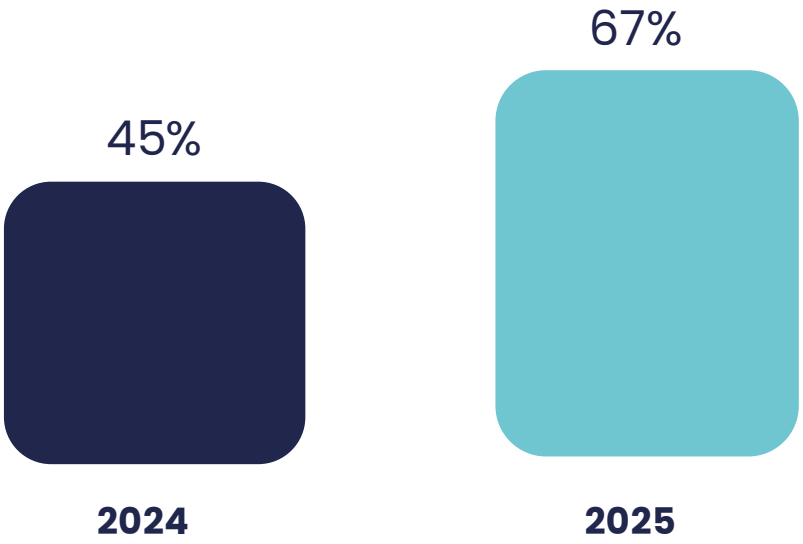

Malta

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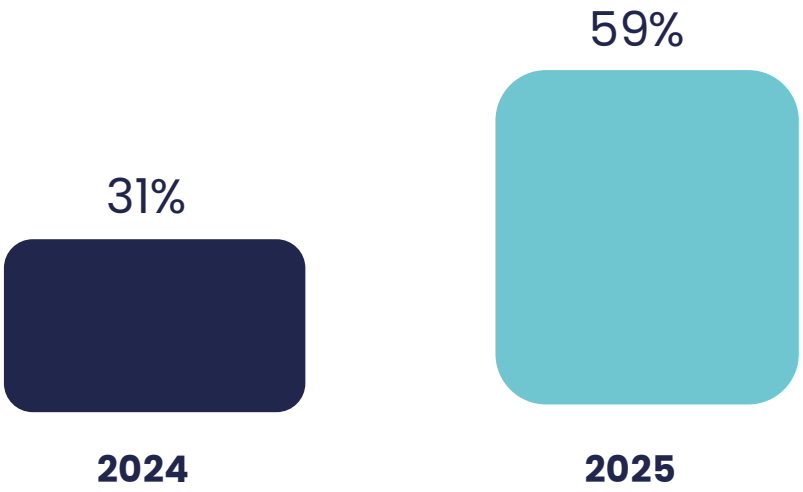

Netherlands

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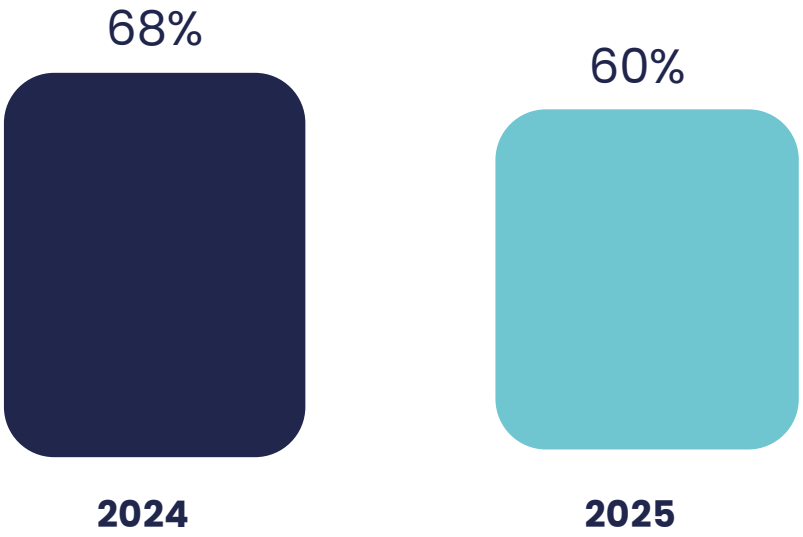

Singapore

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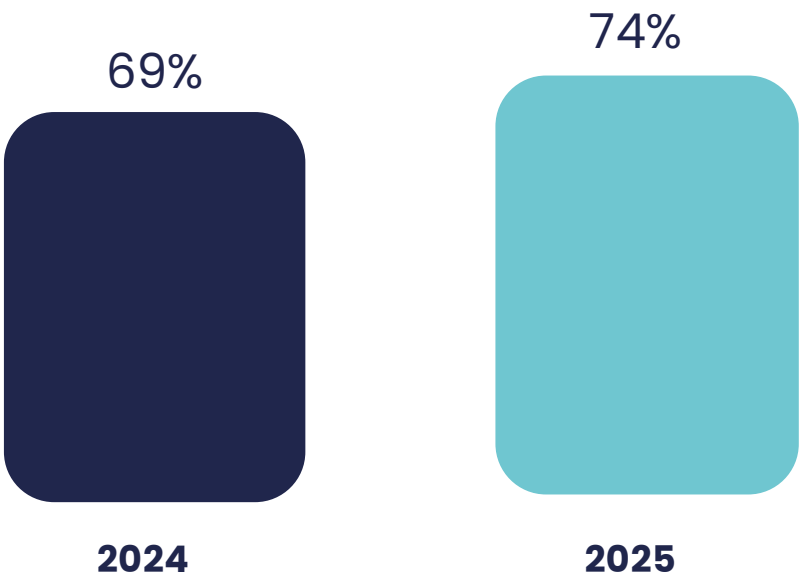

United Kingdom

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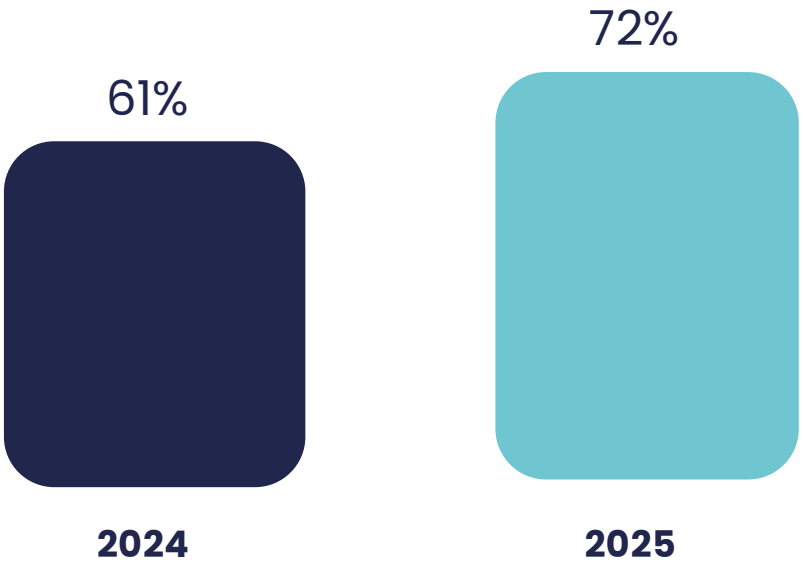


Growth Efforts

In the past two years, have you:

Started placing students into **new/alternative fields of study** = **54%**

Started **recruiting** students from new source countries = **57%**

Started **placing** students into new destination countries = **75%**

Top 6 alternative destinations

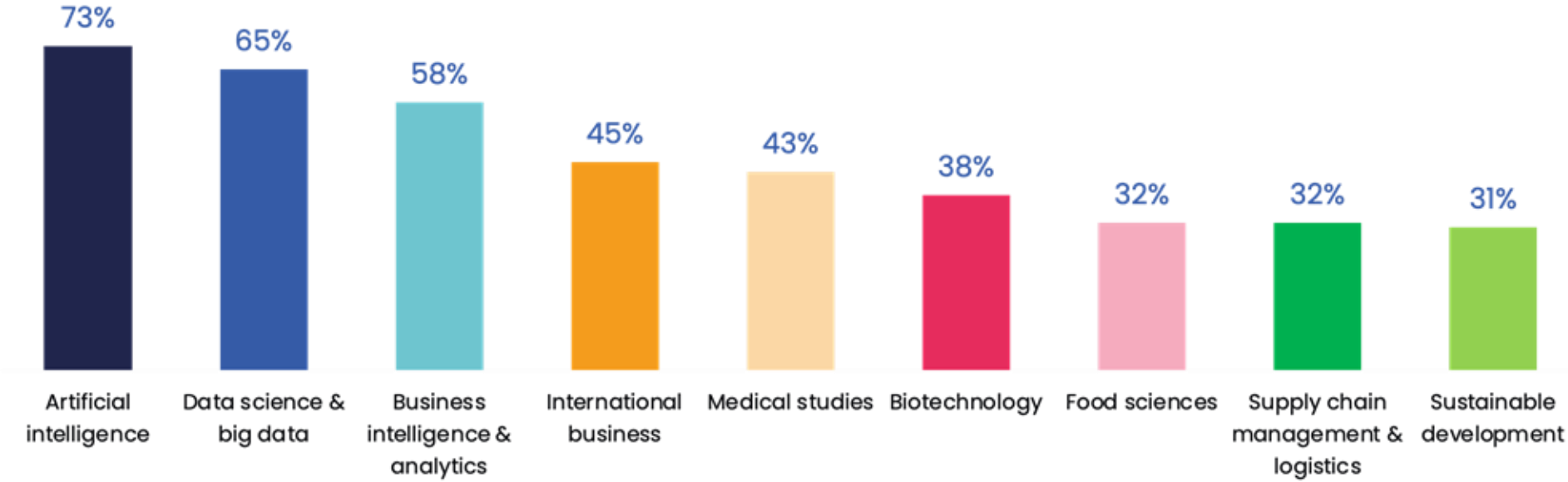
75% of agents have started placing students into new/alternative destination countries in the past 2 years

*Into which **new/alternative study destinations** are you placing students?*

Top 9 new fields

54% of agents have started placing students into new fields of study

What **new fields of study** are your students seeking?



Keypoint 3.

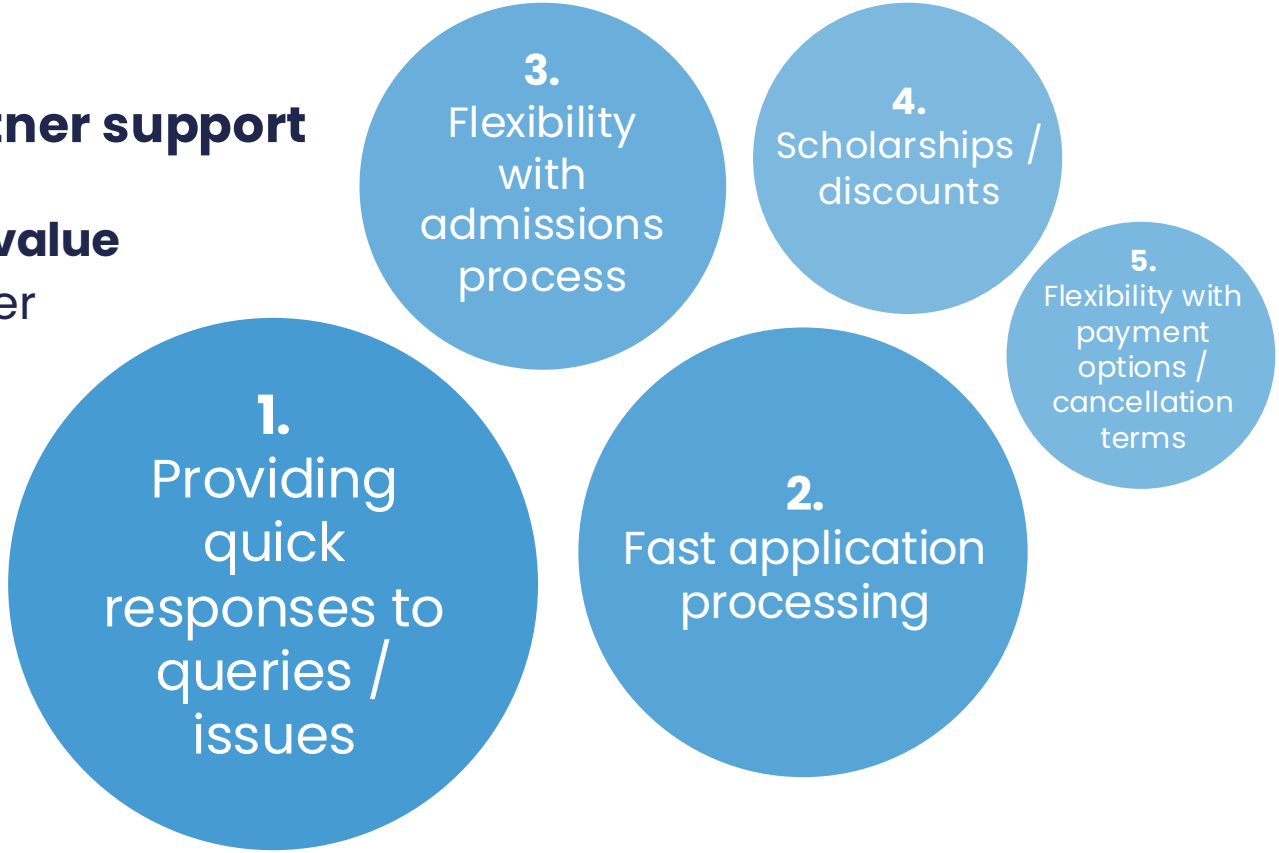
Enrolment challenges & institutional support

Top 5 enrolment challenges

What are the **most challenging aspects** of successfully enrolling students?

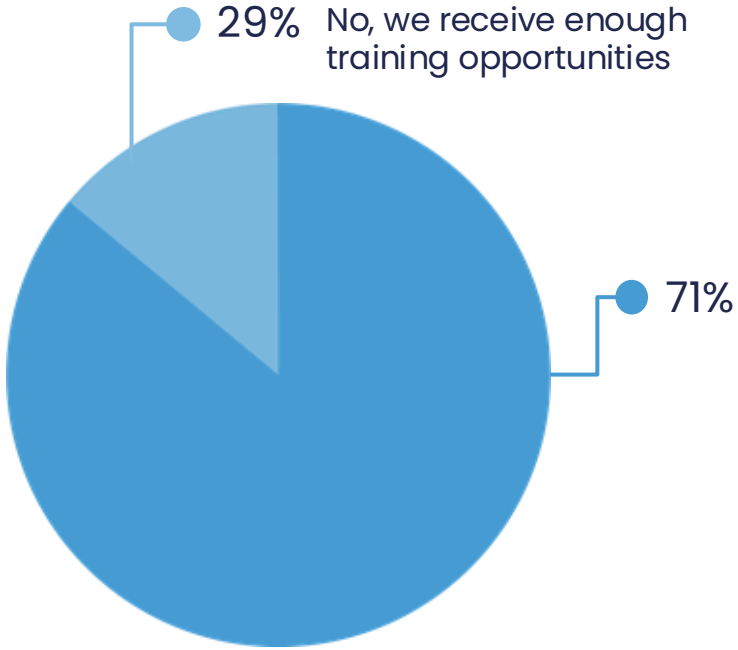
Top 5 priorities for partner support

Which area do you **most value the support of** your partner schools when it comes to successfully enrolling students?



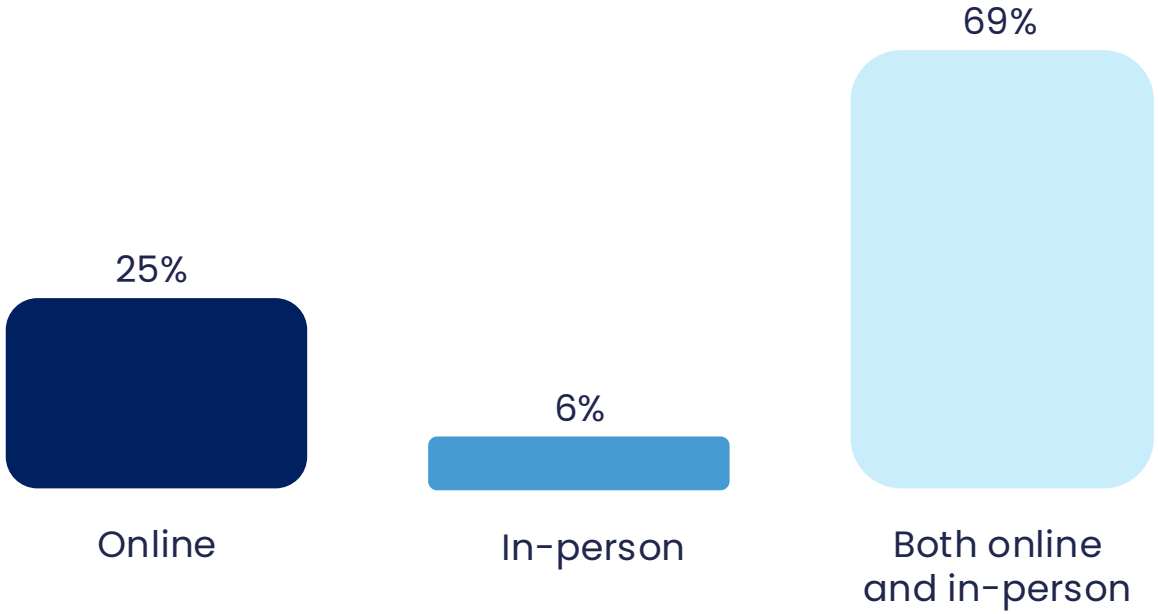
Training from partner institutions

Would you like your colleagues / staff to be able to receive more **training from partner institutions?**



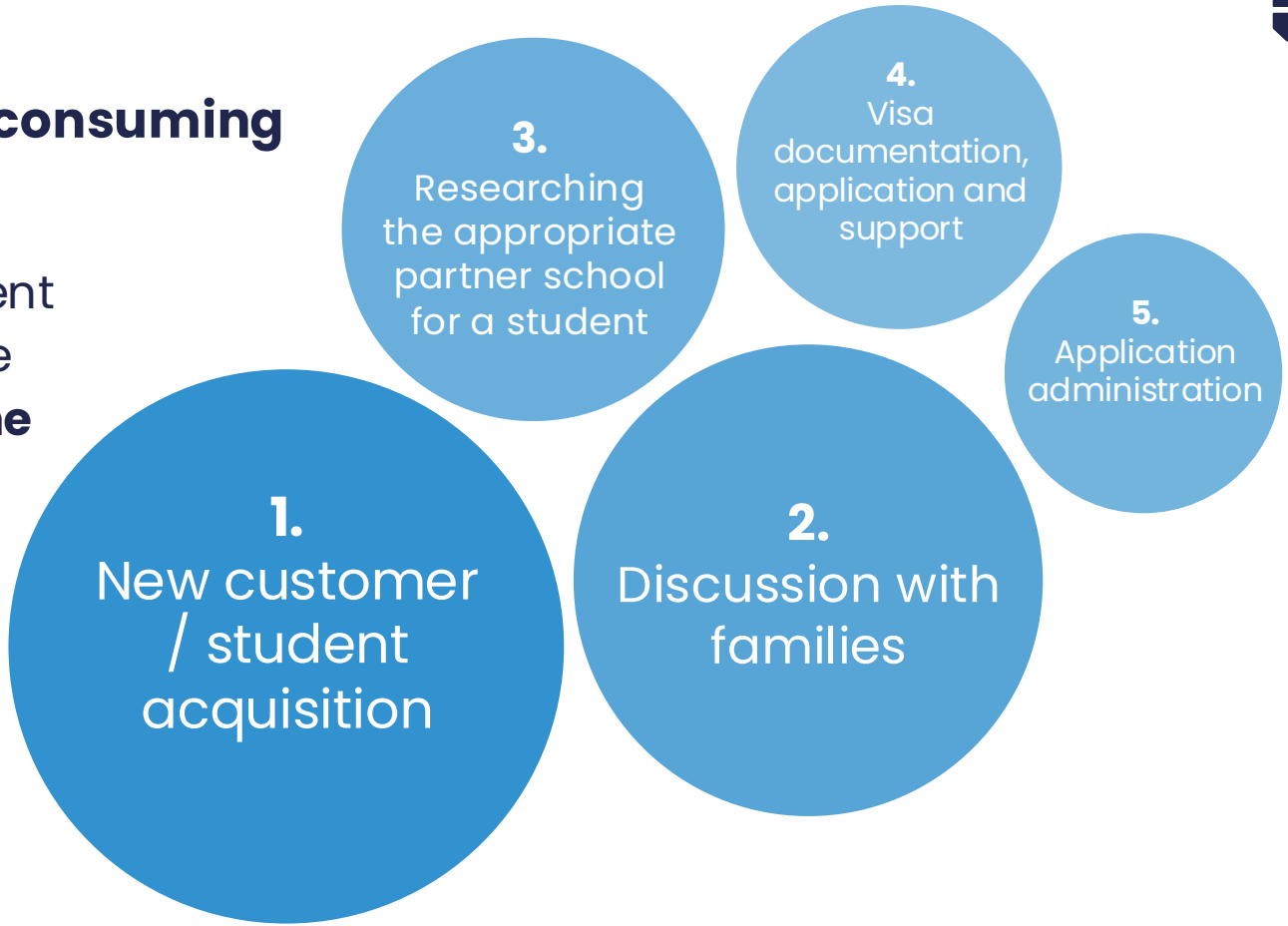
Top modes of training delivery

71% would like to receive training from partner institutions, and most prefer blended delivery



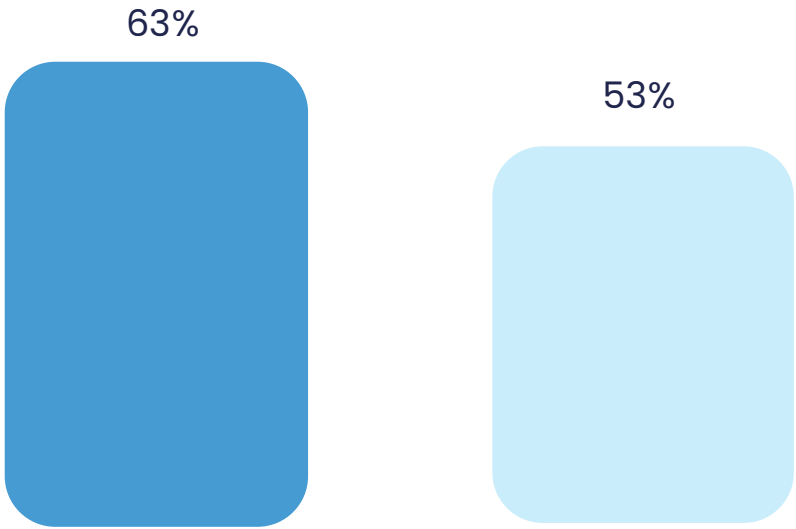
Top 5 most time-consuming processes

During the recruitment process, where is the **majority of your time spent on assisting a student?**



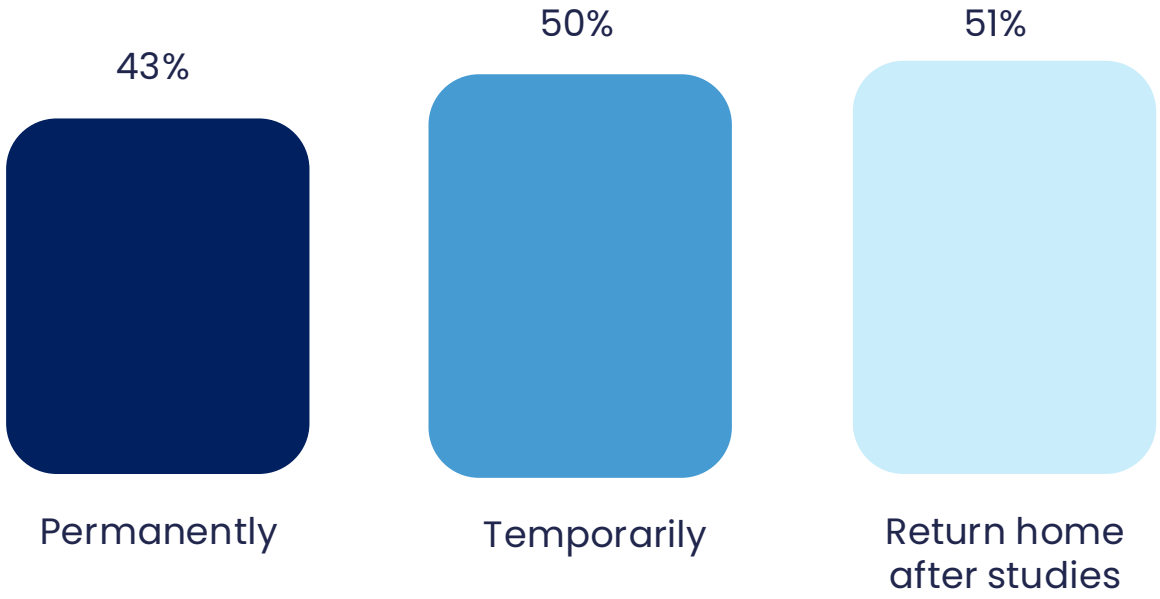
After-sales service

Approximately what percentage of your students return to your agency to **seek counselling:**



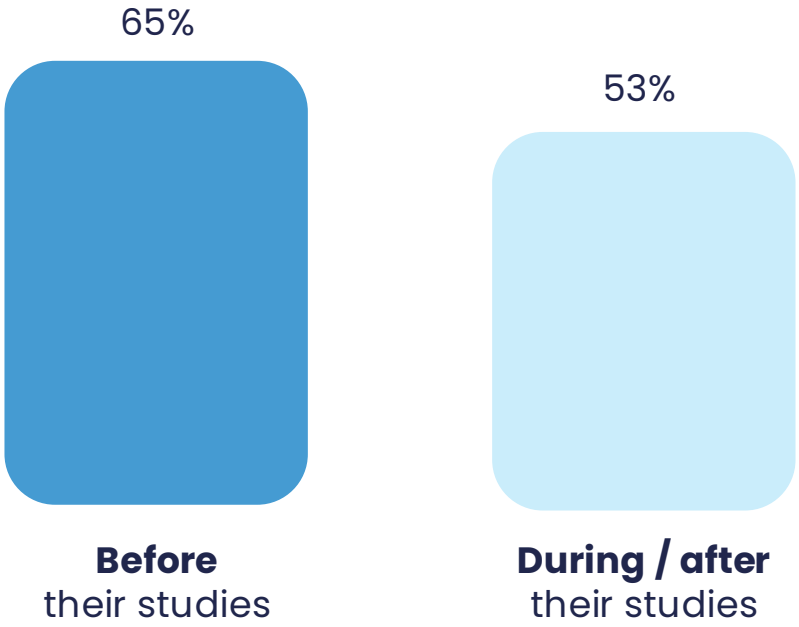
Post-study plans

After finishing their studies, what percentage of your students **stay in the country of study:**



Career counseling

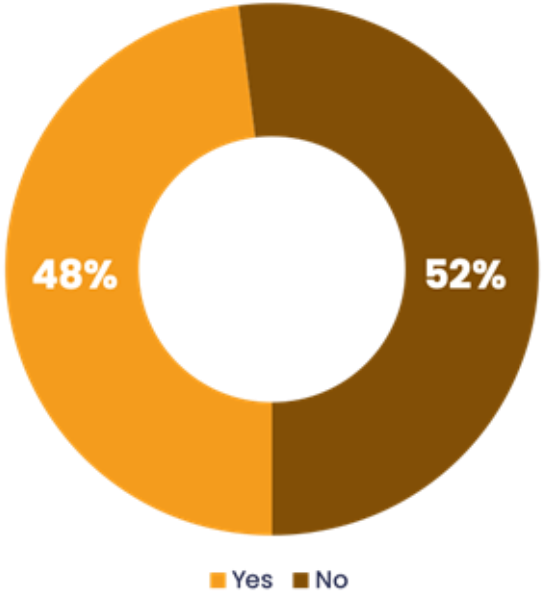
How many of your students ask for career guidance / support:



Keypoint 4.

Online programmes

Are you currently selling or promoting **online education / online programmes?**



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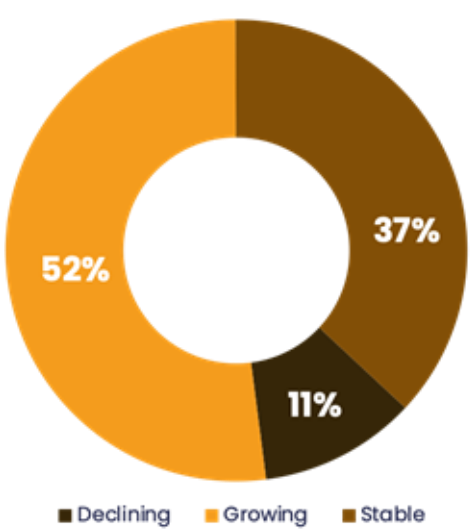
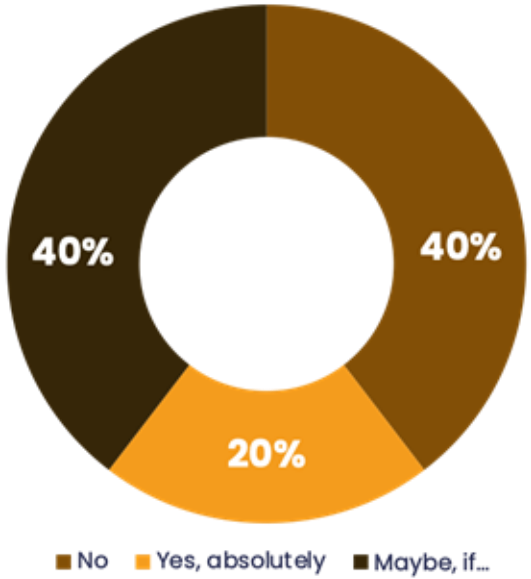


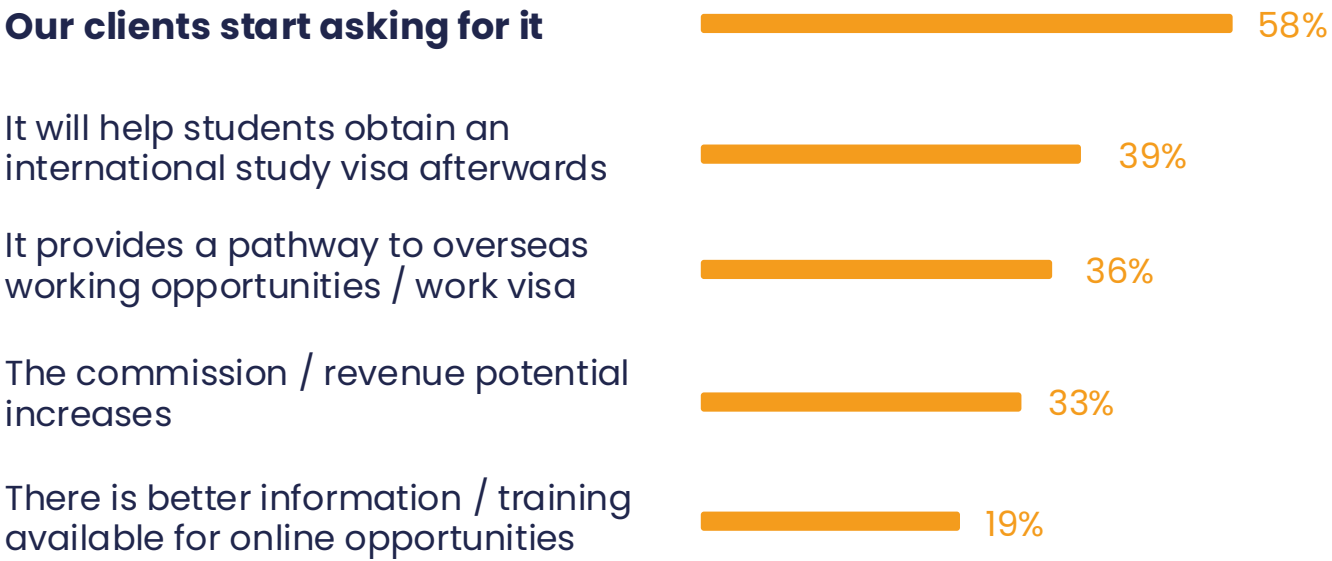
currently selling or promoting **online education / online programmes**

Are you considering **the promotion of online programmes** in the near future?

52% are **not** currently promoting online programmes, but 40% are absolutely considering doing so...



40% may consider promoting online programmes if...

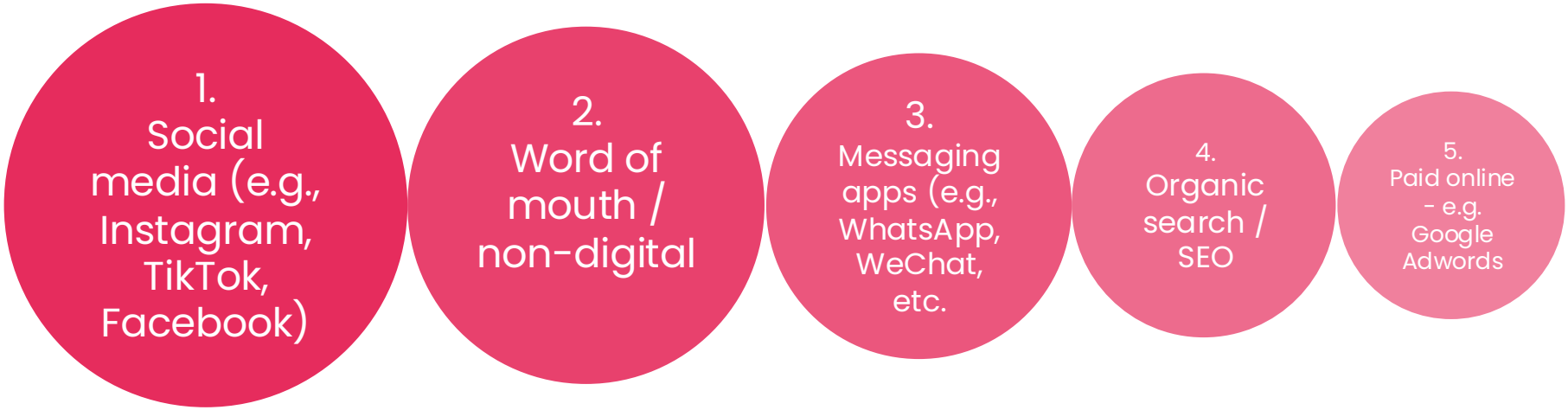


Keypoint 5.

Agency operations & remuneration

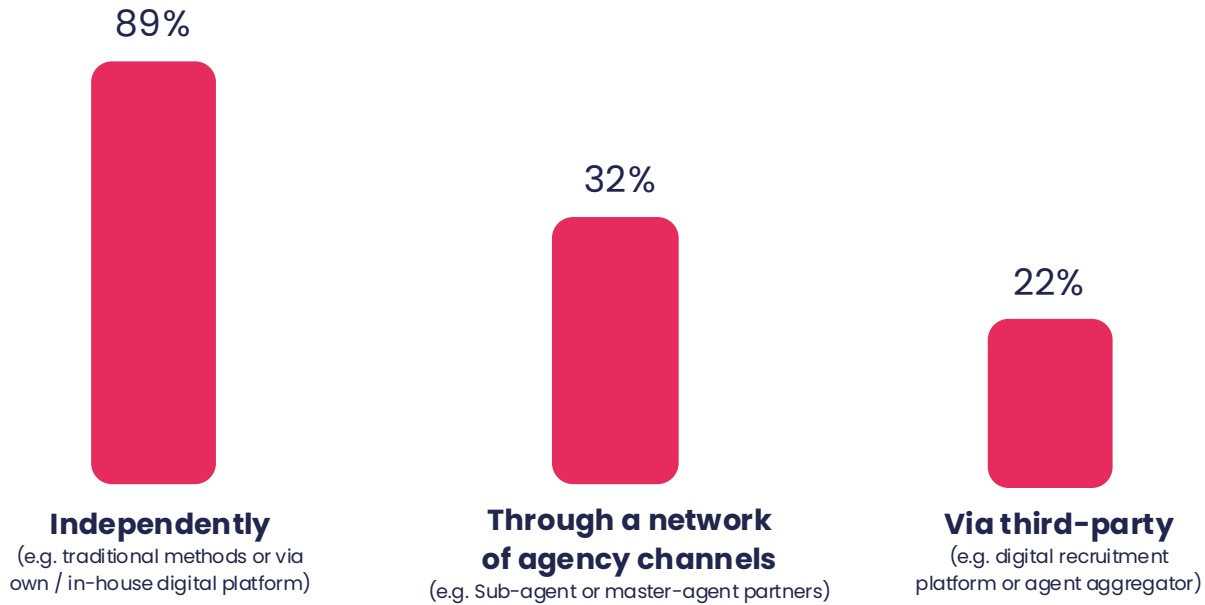
Top 5 marketing channels

How important are these marketing channels in **sourcing your student leads?**



Student recruitment method

How are you currently **recruiting students** and processing applications for education programmes?



Application processing method

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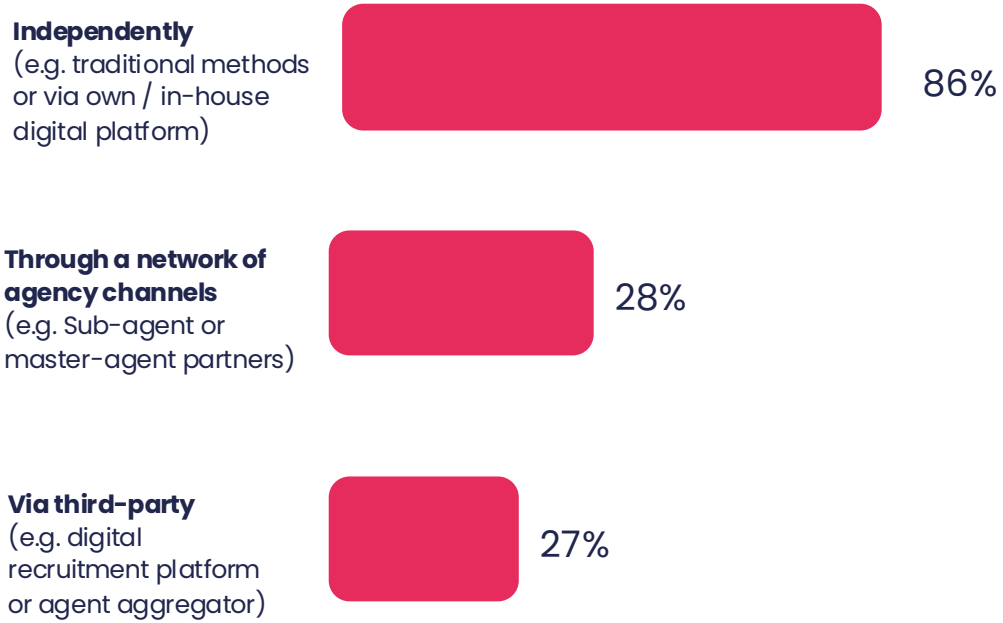
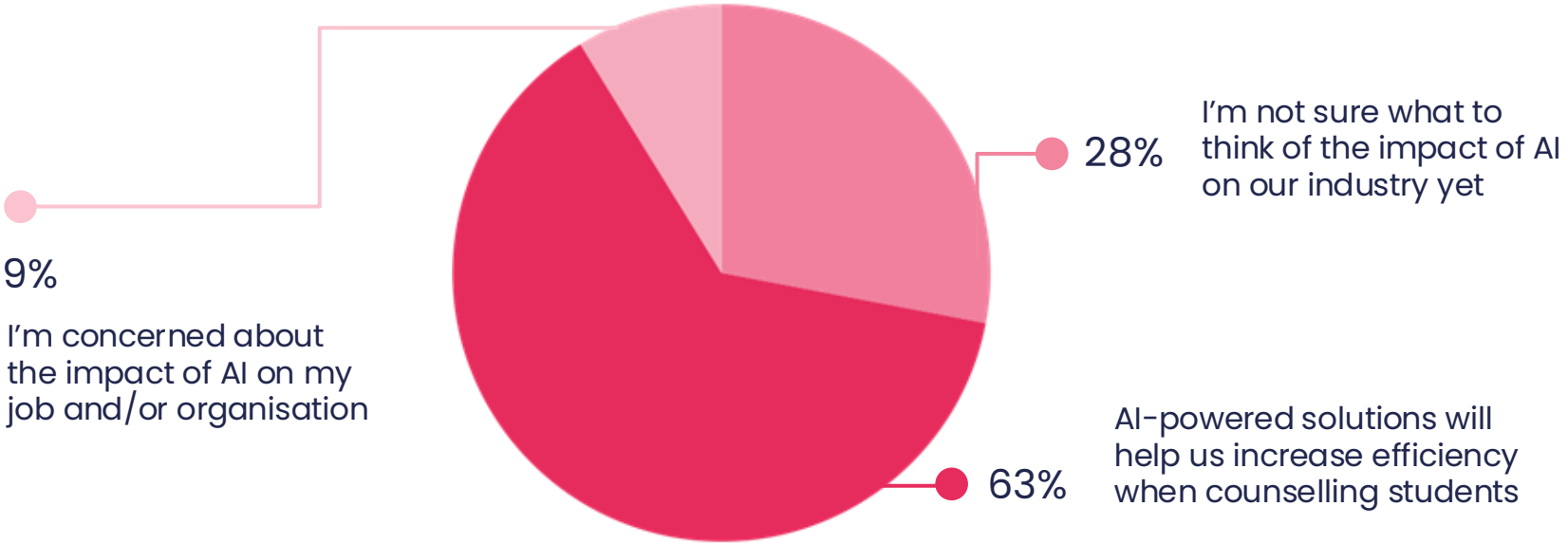


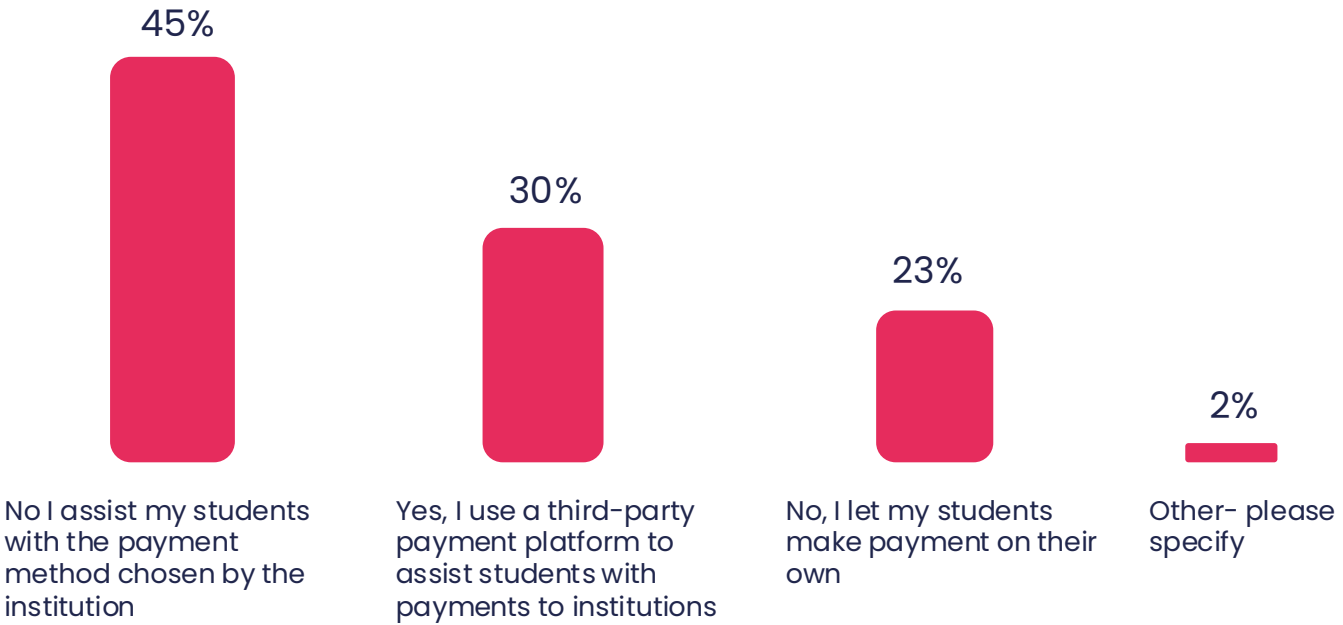
AI-powered solutions

What is your view on **Artificial Intelligence-powered solutions** in international student recruitment?



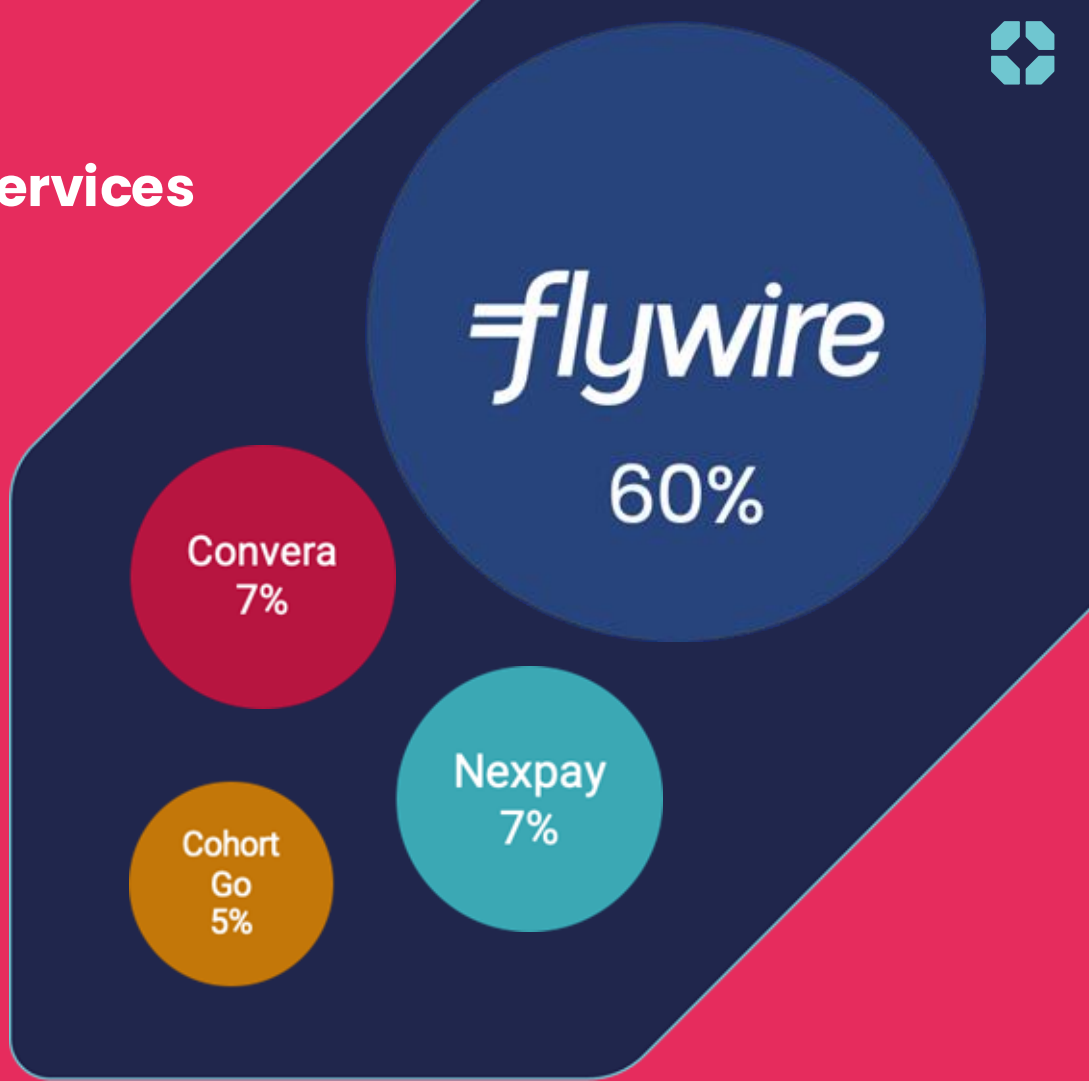
Tuition payment management

Do you partner with any **third-party payment providers** for tuition payment services?



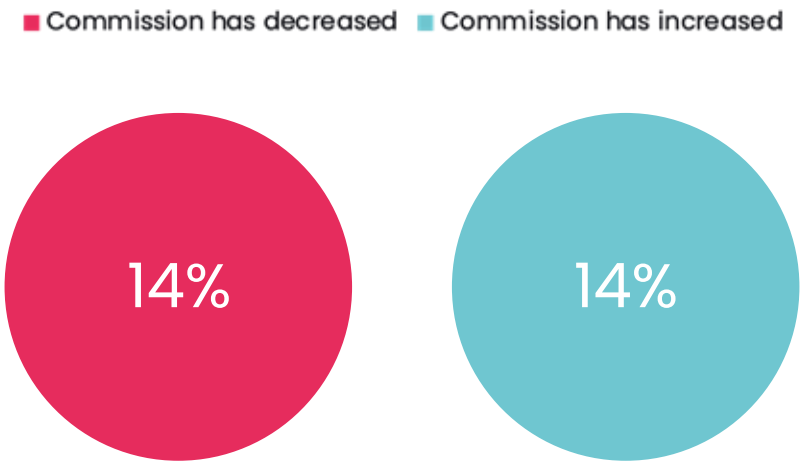
Popular Tuition payment services

Which third-party payment platform to do you use to assist students with payments to institutions?



Remuneration changes

How have commission or payment structures **changed**?



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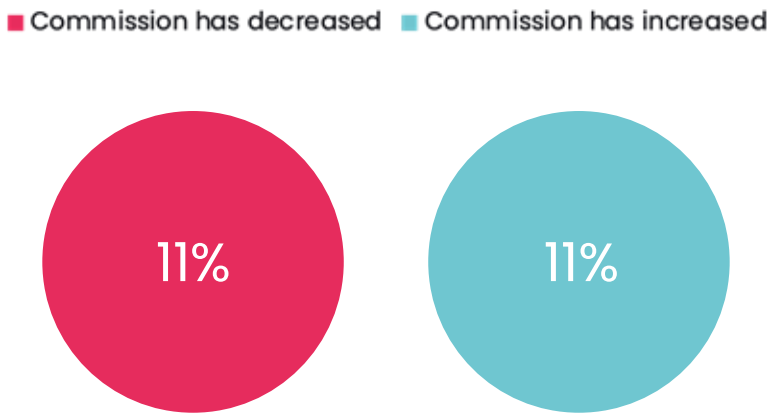
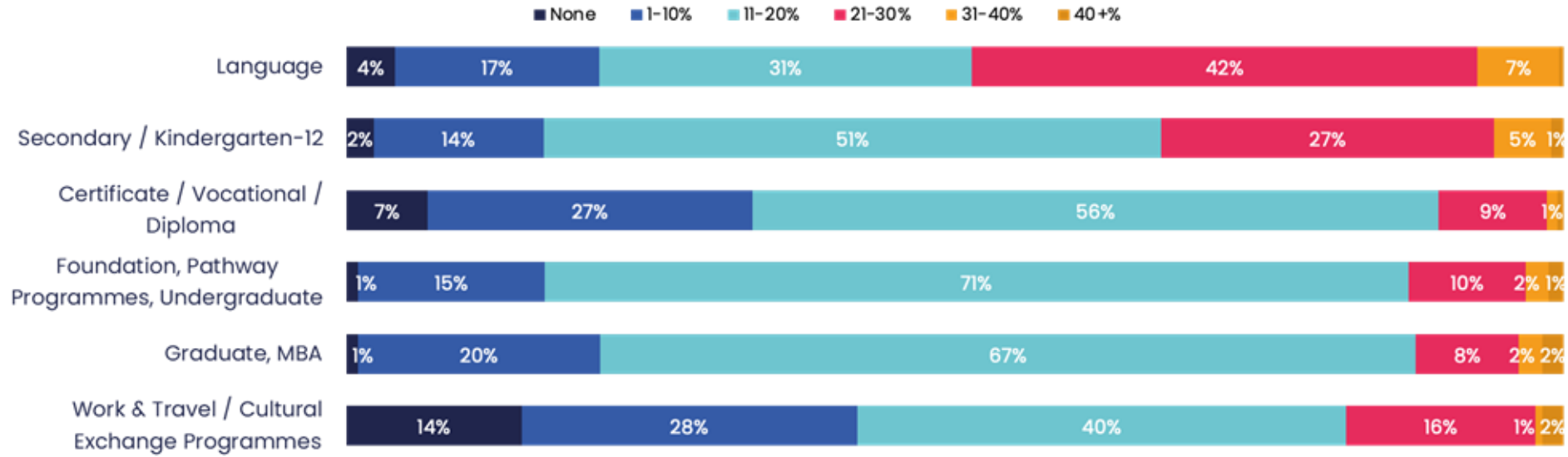


Commission rates

What is your overall **average commission rate** for the following programmes?



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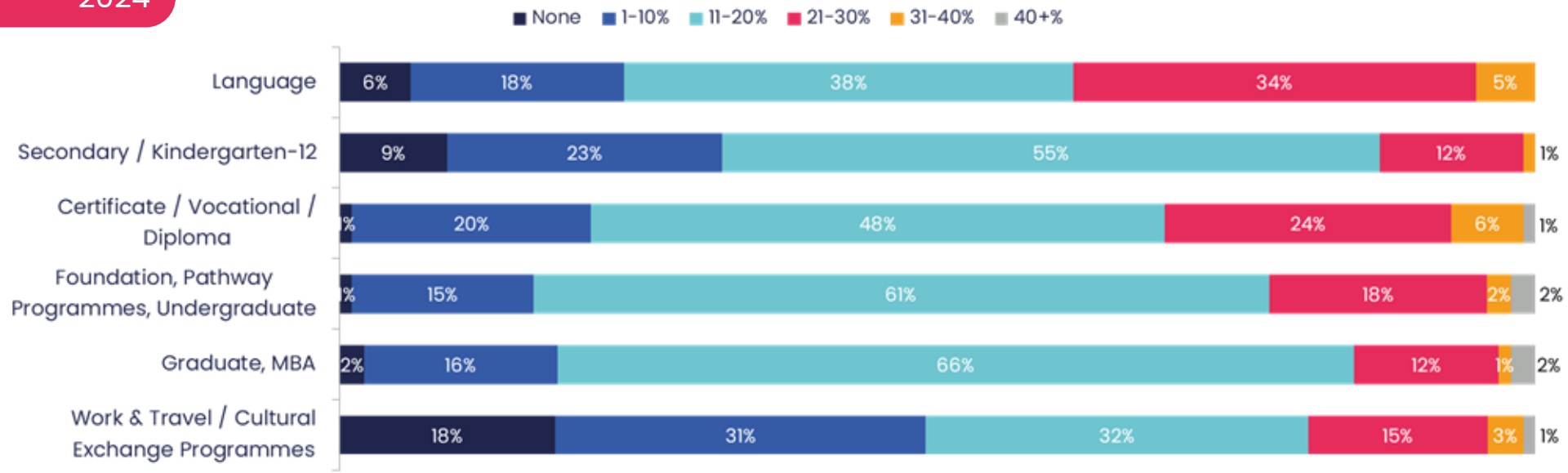
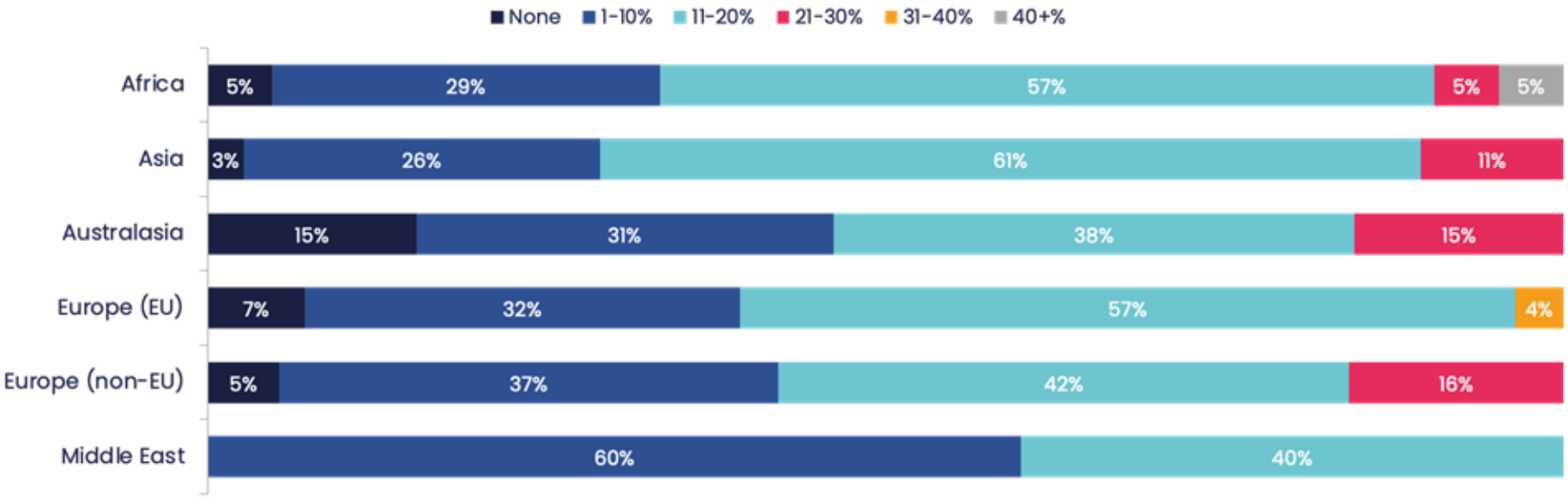
2024



What is your **average commission rate** for the following programmes?

Secondary/K-12:



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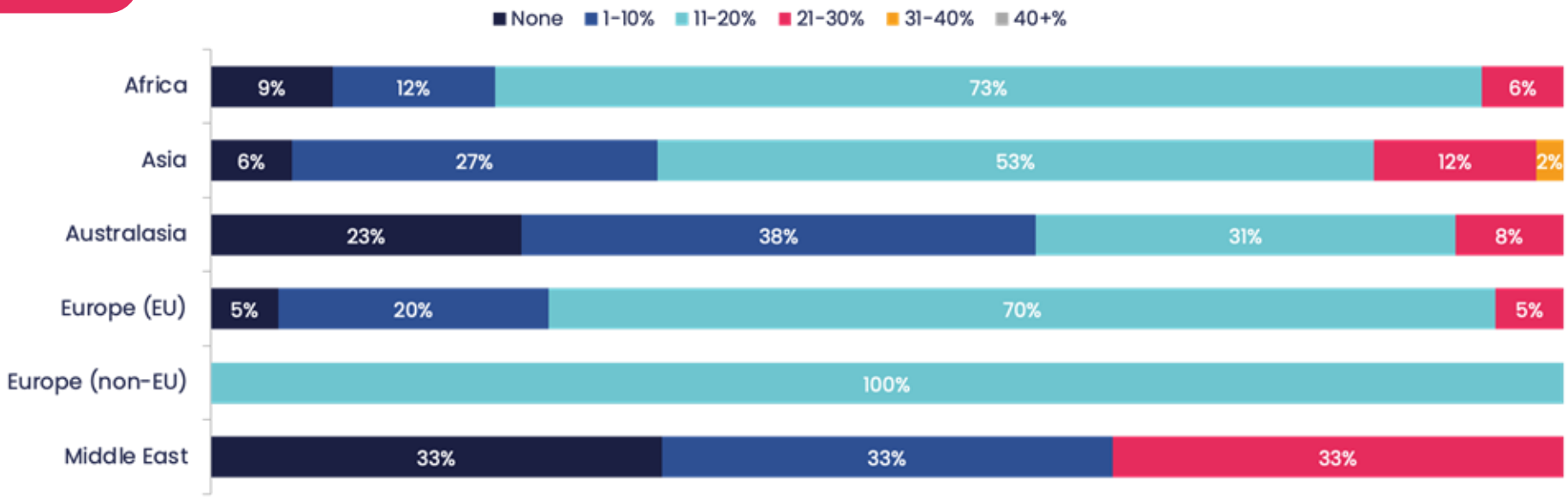
2024

Secondary/K-12:



ICEF Monitor Resources:

1. AI is changing how students search: What it means for marketing and recruitment (Jan. 26, 2026):
https://monitor.icef.com/2026/01/ai-is-changing-how-students-search-what-it-means-for-marketing-and-recruitment/

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