

## 1. Research Objective

This report provides a data-driven assessment of the global agency network and its readiness to support Japan's ambition to increase and diversify its international student population. For Japanese Higher Education Institutions (HEIs), this document sets the starting point for understanding the demand, capacity, financial expectations, and current roadblocks within the international recruitment channel.

## 2. Respondent Profile and Market Reach

The findings are based on a quantitative survey of **303 professional education agencies** across **68 countries**.

- **Scale of Operation:** The sample represents significant recruitment infrastructure; **35% of agencies** manage more than 51 global institutional partnerships, with **17% managing over 100**.
- **Counselling Capacity:** **51% of responding agencies** employ more than 6 student-facing counselors, with 14.5% employing over 21.
- **Service Standards:** The data shows high levels of professionalisation: **92%** provide visa and pre-departure support, **91%** conduct formal document verification, and **82%** invest in professional staff training.

## 3. Key Findings: The "Interest Gap"

The research identifies a significant disconnect between global market interest and current institutional engagement in Japan:

- **Market Interest:** On a scale of 1–5, the average interest level in partnering with Japanese universities is **4.41**, with **68%** of respondents selecting the maximum interest level (5/5).
- **Market Penetration:** Despite this interest, 87.5% of surveyed agencies currently have zero formal partnerships with a Japanese HEI.
- **Underutilised Capacity:** Of the agencies that do have a Japanese partner, **85%** work with only 1–3 institutions, indicating a lack of diversified options for prospective students.

## 4. Primary Barriers to Recruitment

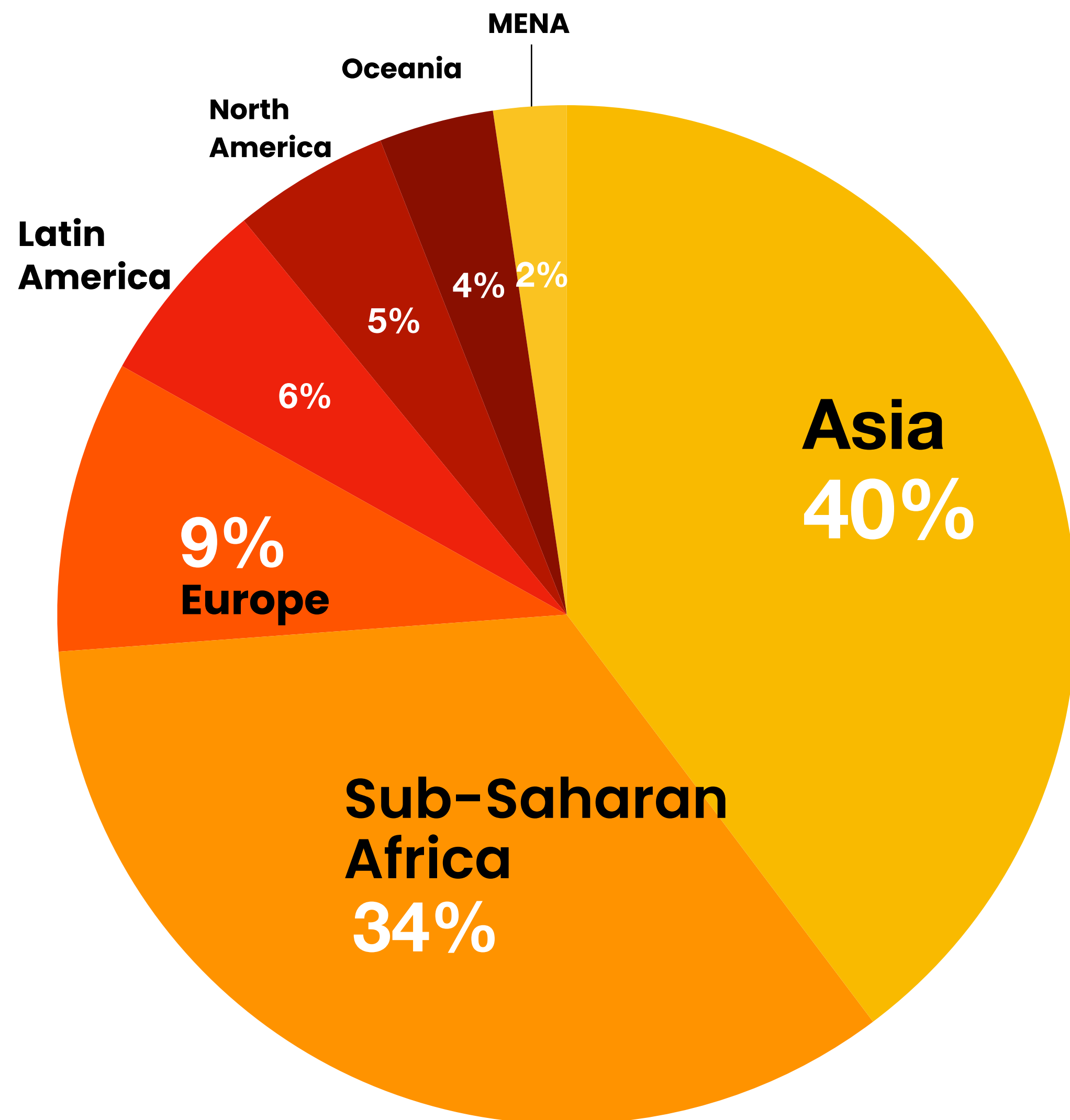
The report quantifies the following hurdles to international enrolment:

- 1. Brand Recognition (76%):**  
A lack of awareness of Japanese university brands in local markets.
- 2. Language Perception (75%):**  
The perception that programs are not available in English.
- 3. Information Deficit (52%):**  
A lack of marketing materials and direct engagement from university administrations.

1

# In which country is your head office located?

Answered by 302 out of 303

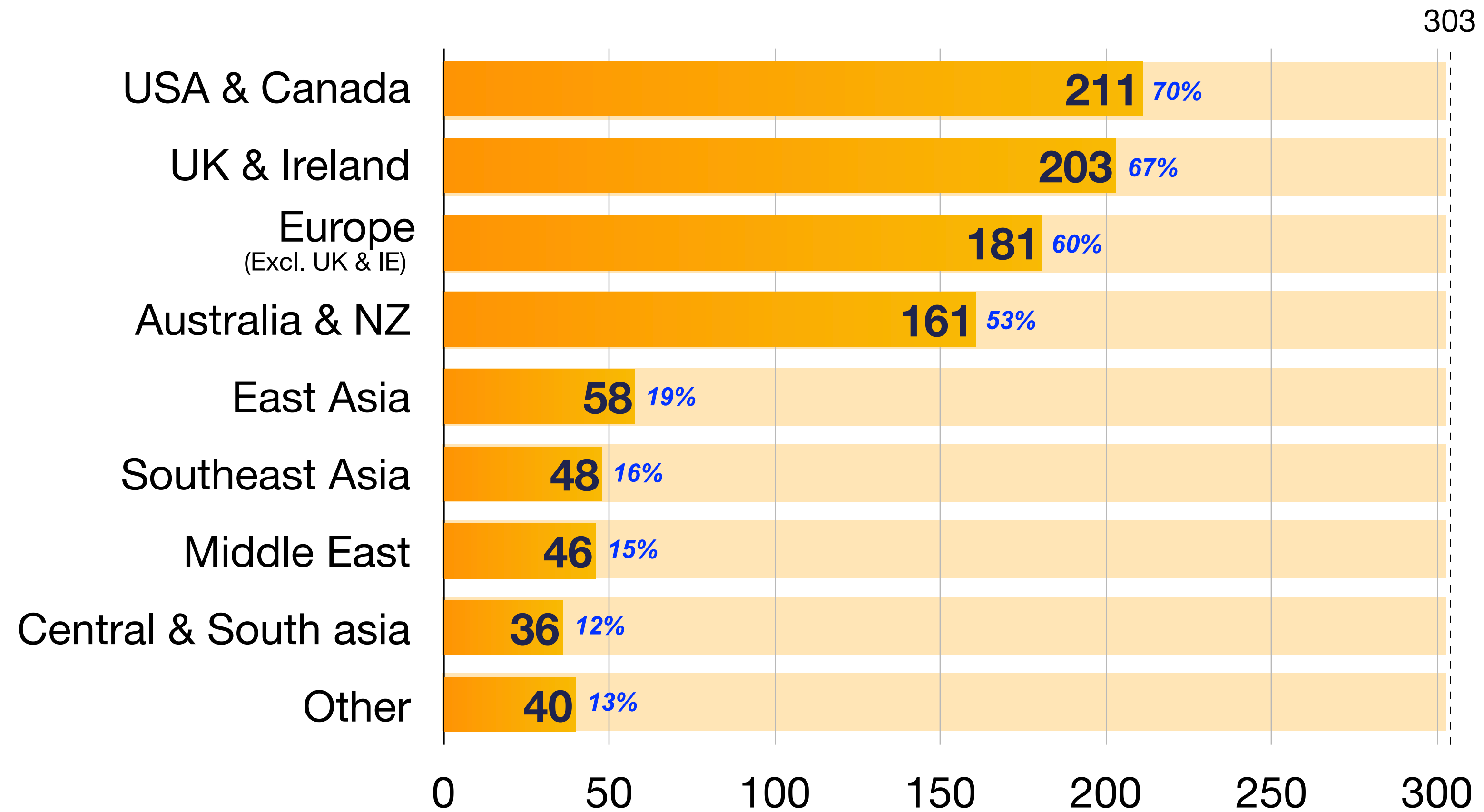


## Agency head offices in 68 countries and regions

Nigeria	50	Taiwan	3	Poland	1
India	23	Sri Lanka	3	Peru	1
Nepal	19	Senegal	3	Papua New Guinea	1
China	13	Malaysia	3	Panama	1
Pakistan	12	Korea, South	3	Norway	1
United Kingdom	11	France	3	North Macedonia	1
Canada	11	Colombia	3	No entry	1
Japan	10	Serbia	2	Netherlands	1
Australia	10	Madagascar	2	Moldova	1
Kenya	9	Indonesia	2	Malawi	1
Bangladesh	9	Ethiopia	2	Liberia	1
Philippines	8	Egypt	2	Kyrgyzstan	1
Ghana	8	Burkina Faso	2	Jordan	1
Mexico	7	Brazil	2	Ireland	1
Rwanda	6	Zambia	1	Hong Kong	1
Ivory Coast	5	Venezuela	1	Guatemala	1
Zimbabwe	4	Uzbekistan	1	Georgia	1
United States	4	Trinidad & Tobago	1	Finland	1
Turkey	4	Spain	1	Estonia	1
Cameroon	4	South Africa	1	Cambodia	1
Vietnam	3	Slovakia	1	Bolivia	1
Thailand	3	Singapore	1	Benin	1
Tanzania	3	Romania	1	Albania	1

# Which of the following regions do you primarily recruit students for?

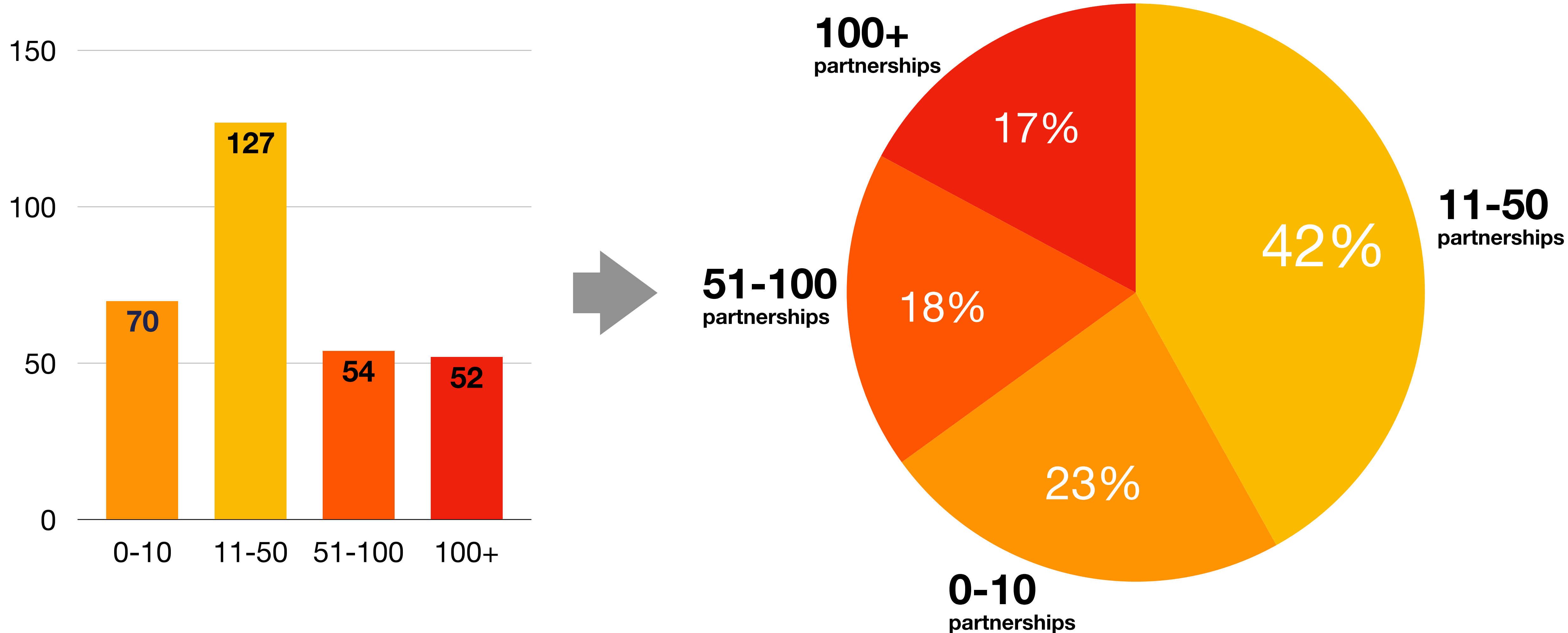
Answered by 303 out of 303



### 3

# Approximately how many educational institutions does your agency have partnerships with globally?

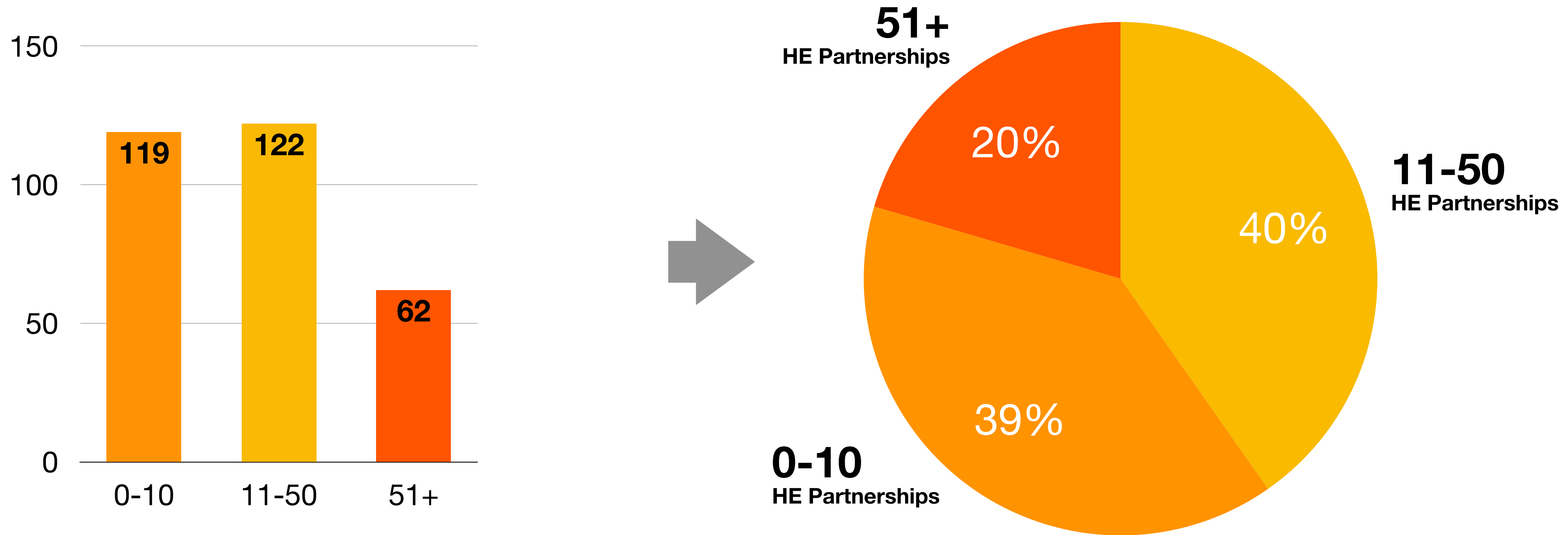
Answered by 303 out of 303



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# Of these, how many are Higher Education Institutions?

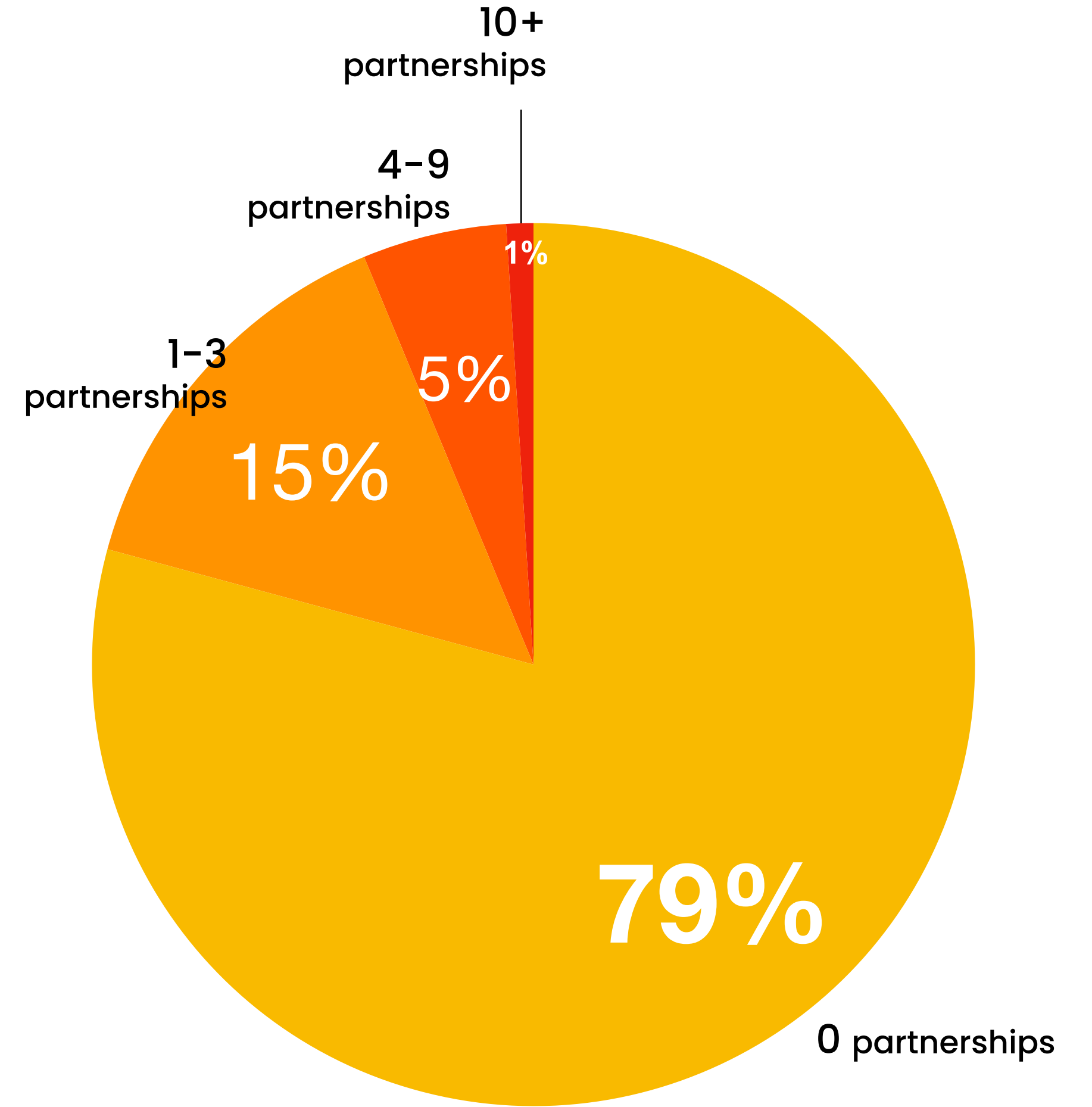
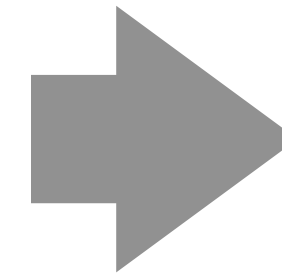
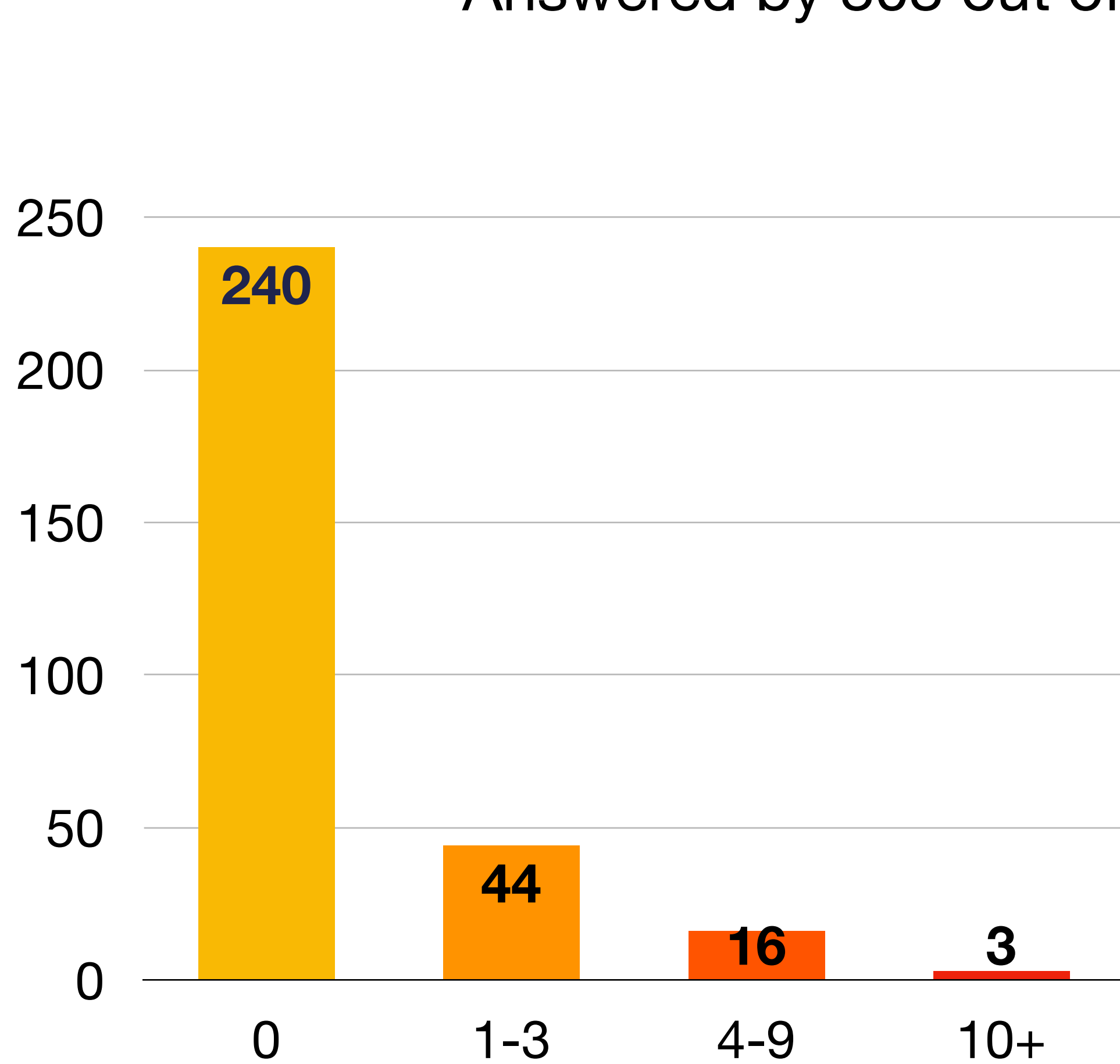
Answered by 303 out of 303



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# Of these, how many are Japanese Higher Education Institutions?

Answered by 303 out of 303

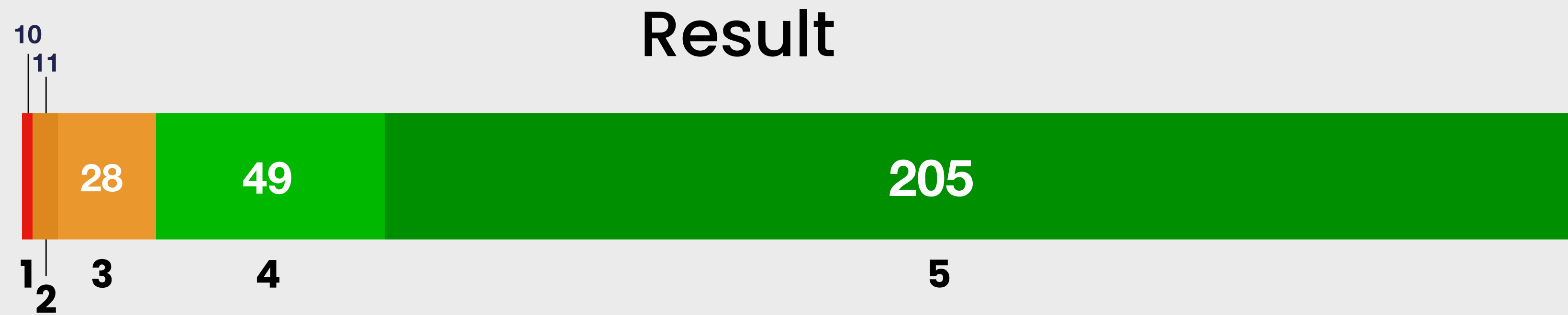


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# What is your agency's level of interest in partnering with more Japanese universities?

Answered by 303 out of 303

1 = very low 5 = very high



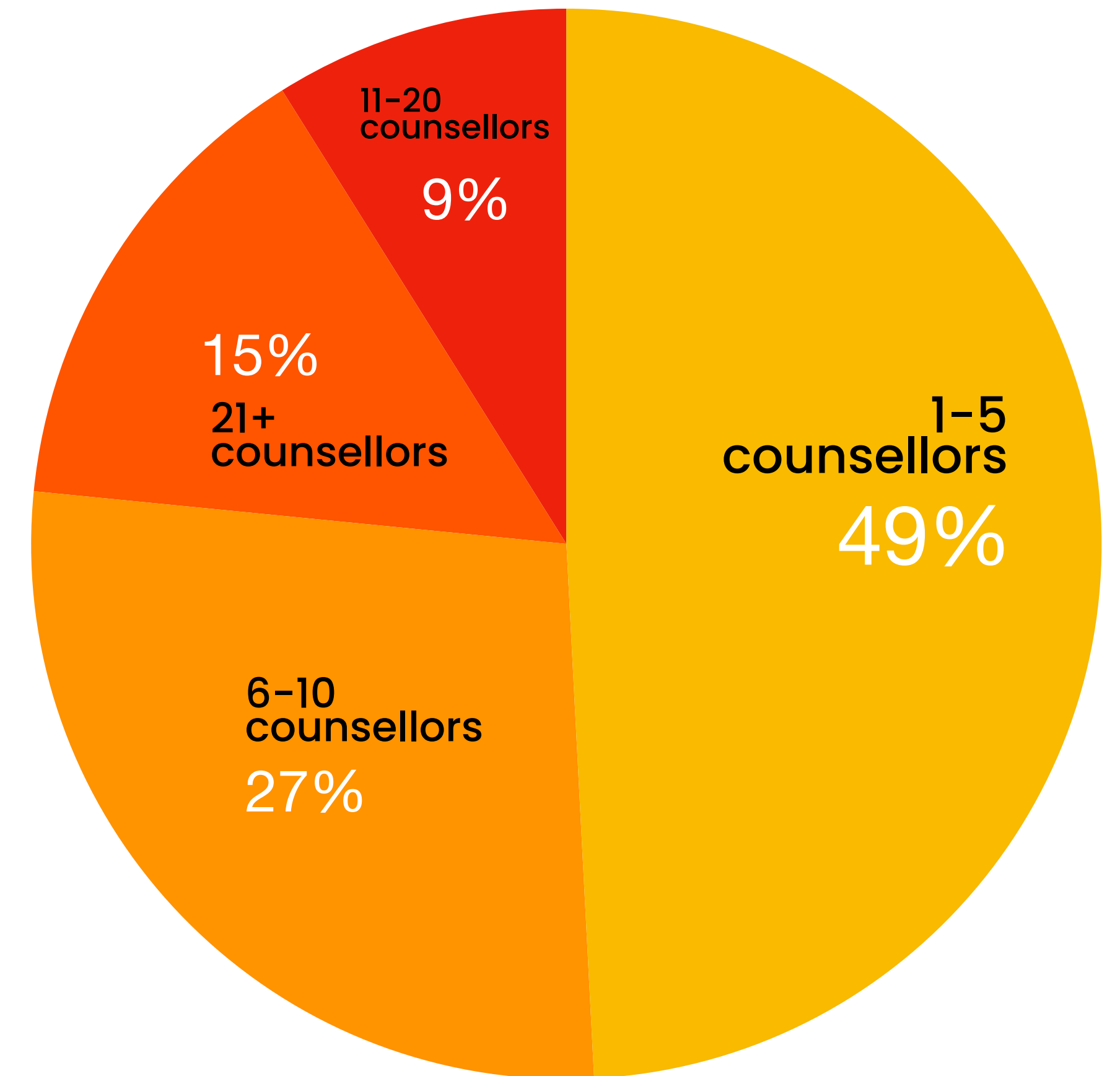
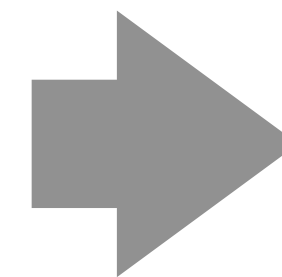
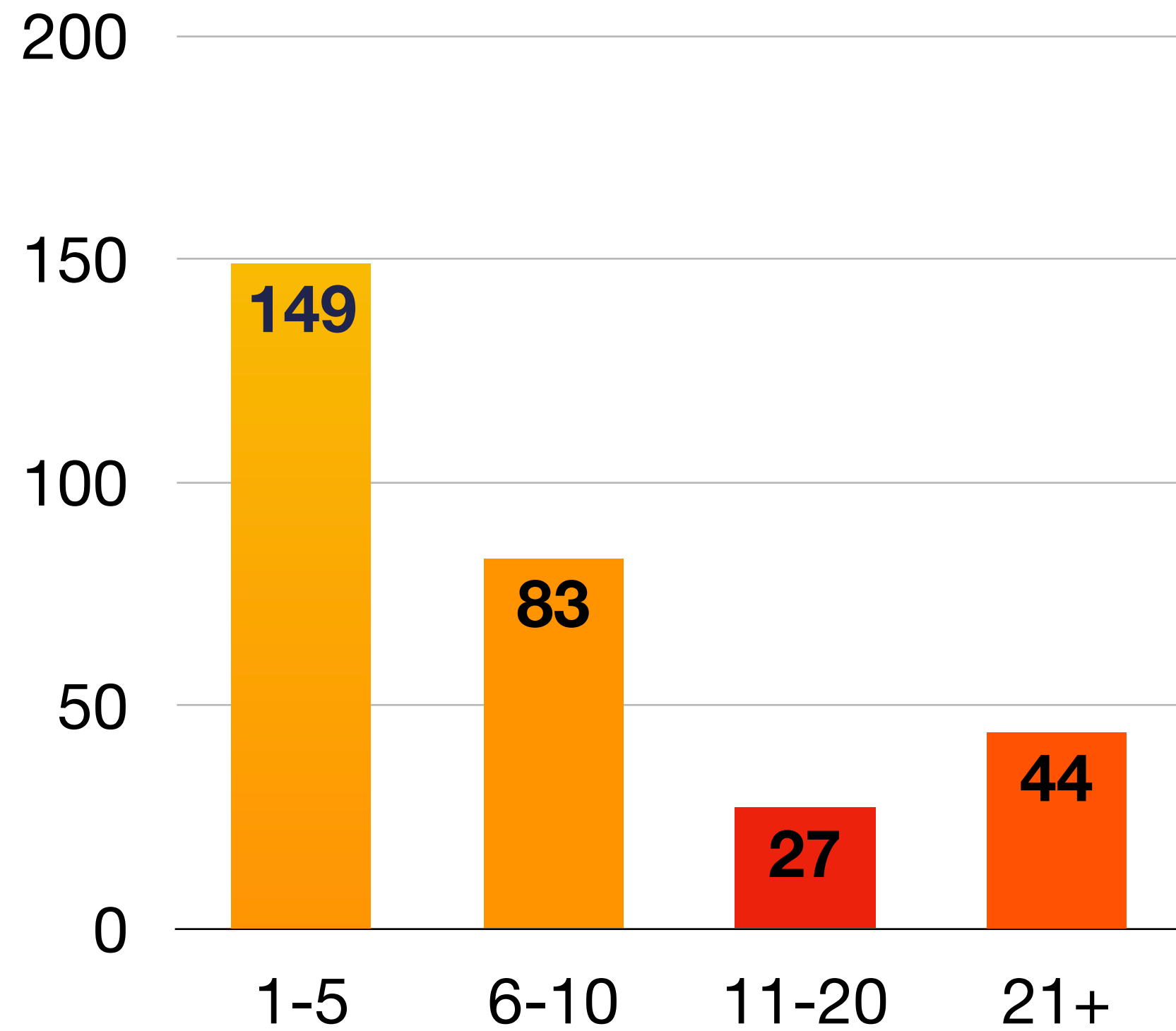
### Average interest



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# How many student-facing counsellors work at your agency?

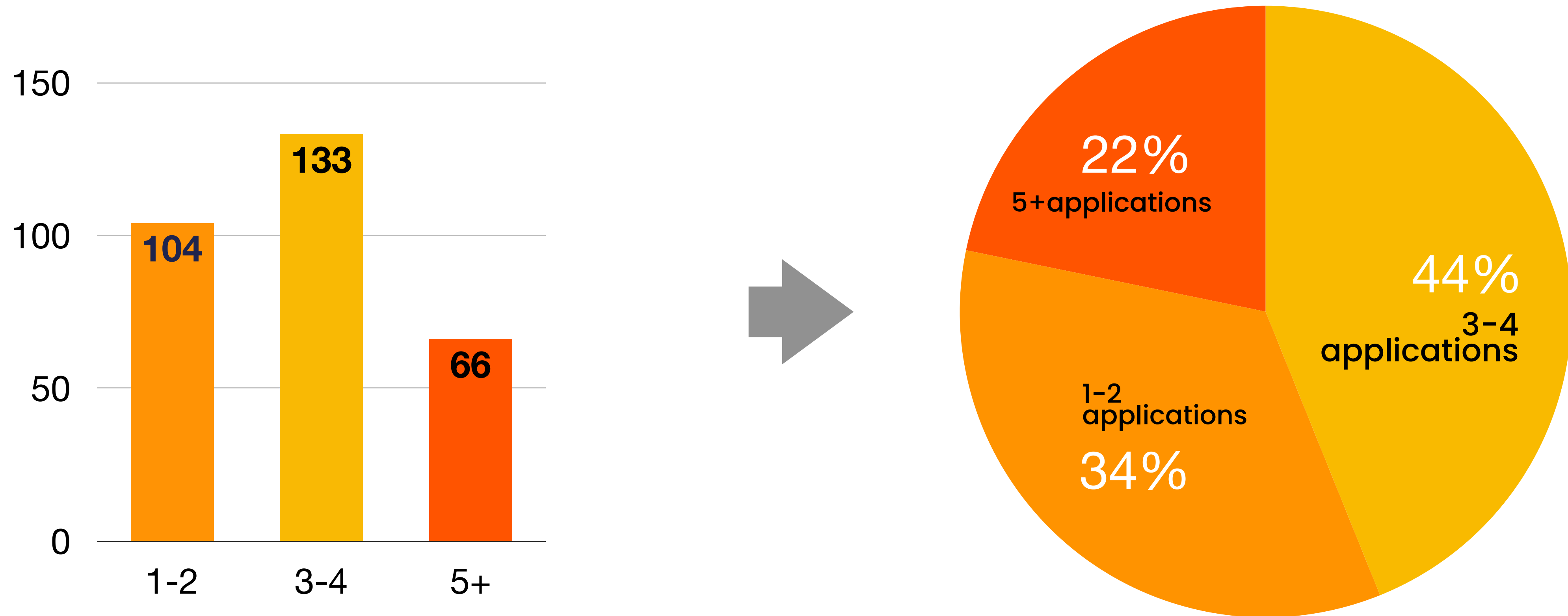
Answered by 303 out of 303



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# On average, how many university applications do you handle for each student?

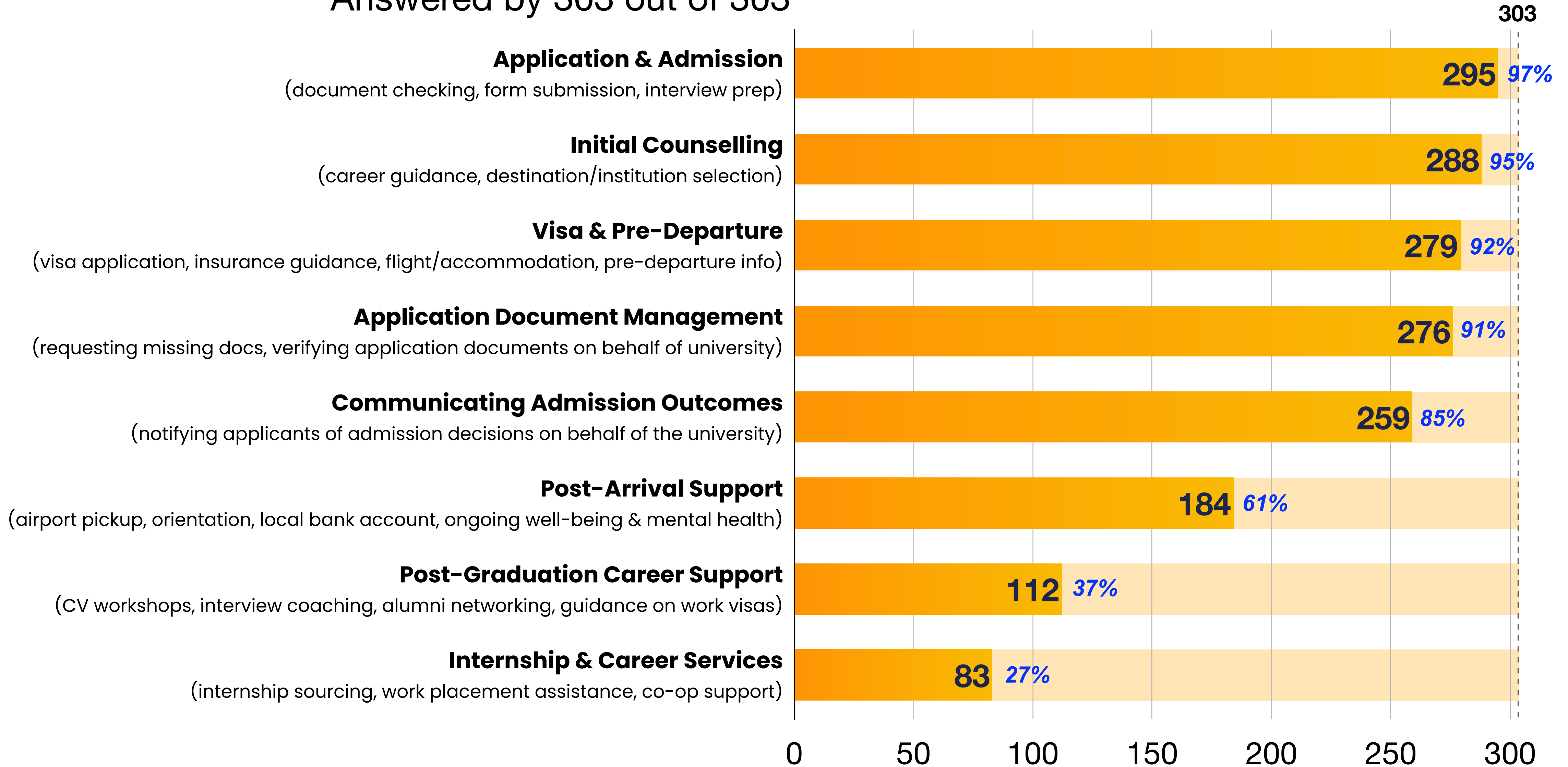
Answered by 303 out of 303



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# Which of the following services do you provide to students and their families?

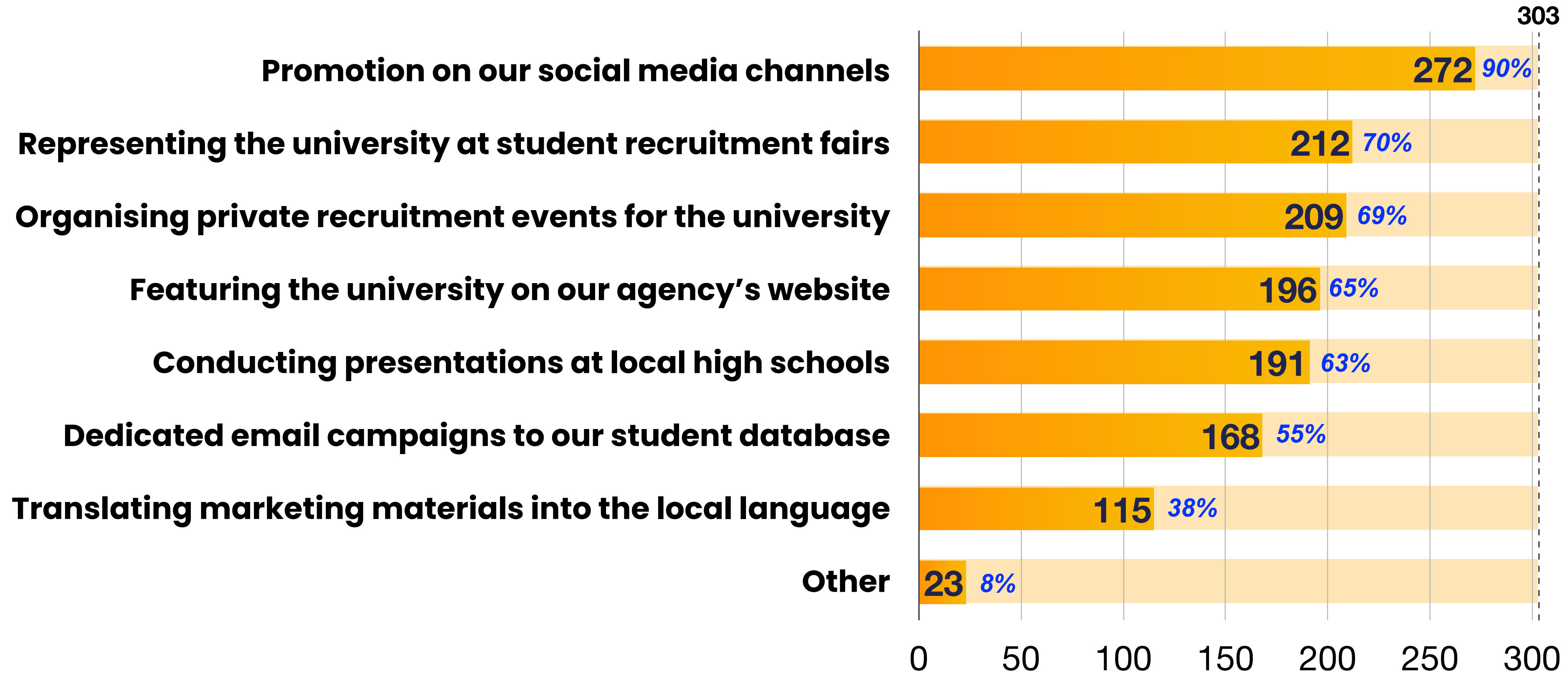
Answered by 303 out of 303



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# What marketing and promotional services do you provide to your partner universities?

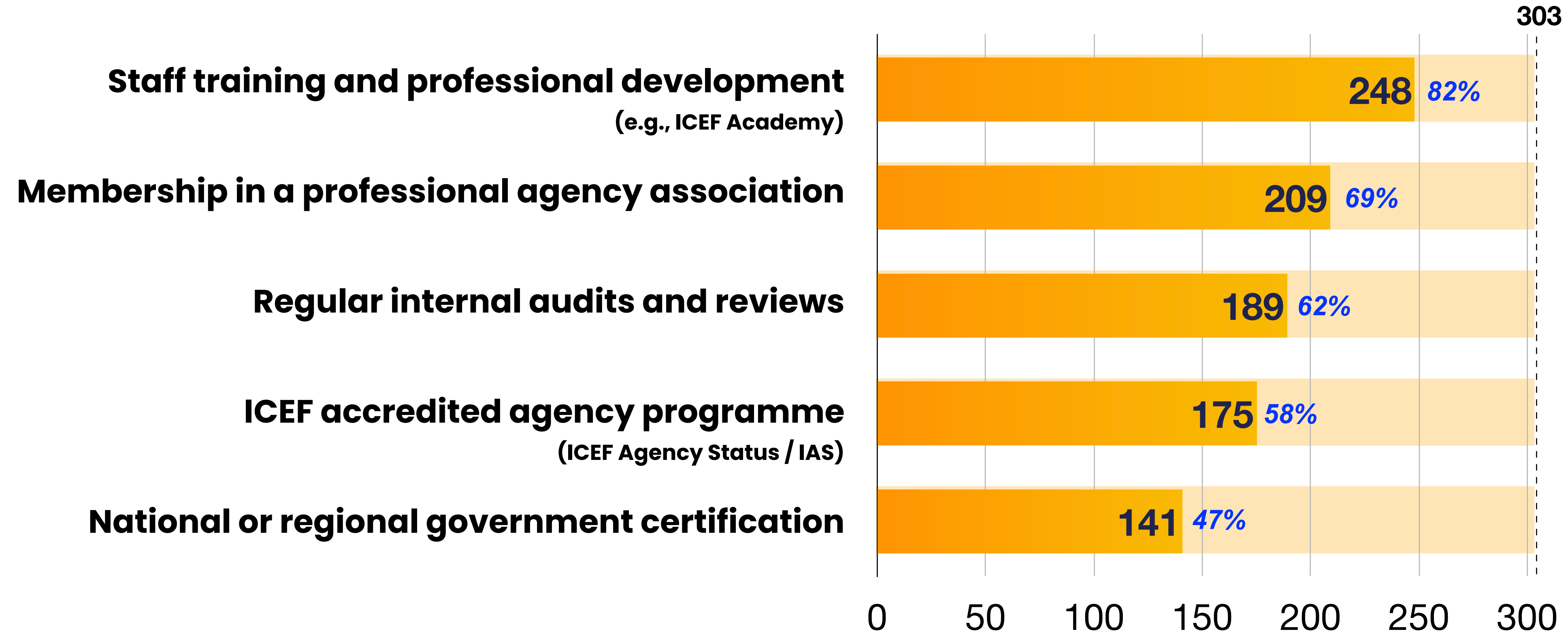
Answered by 303 out of 303



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# How do you ensure the quality and integrity of your services?

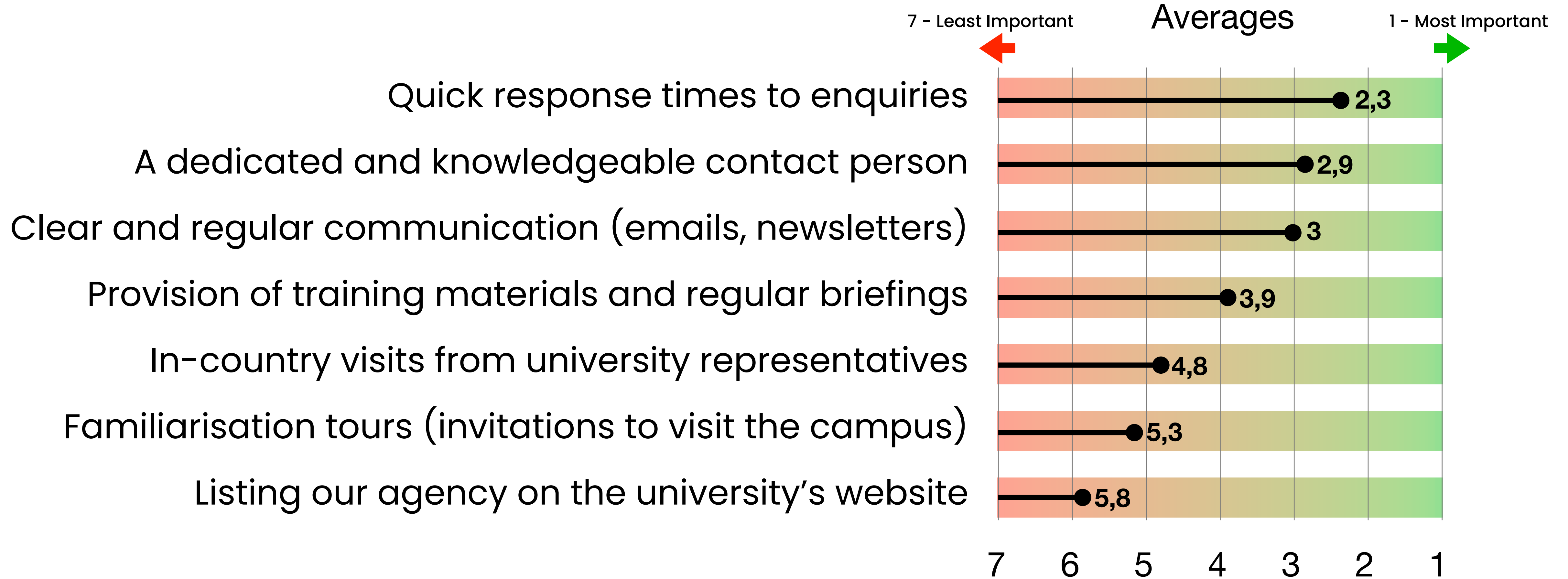
Answered by 303 out of 303



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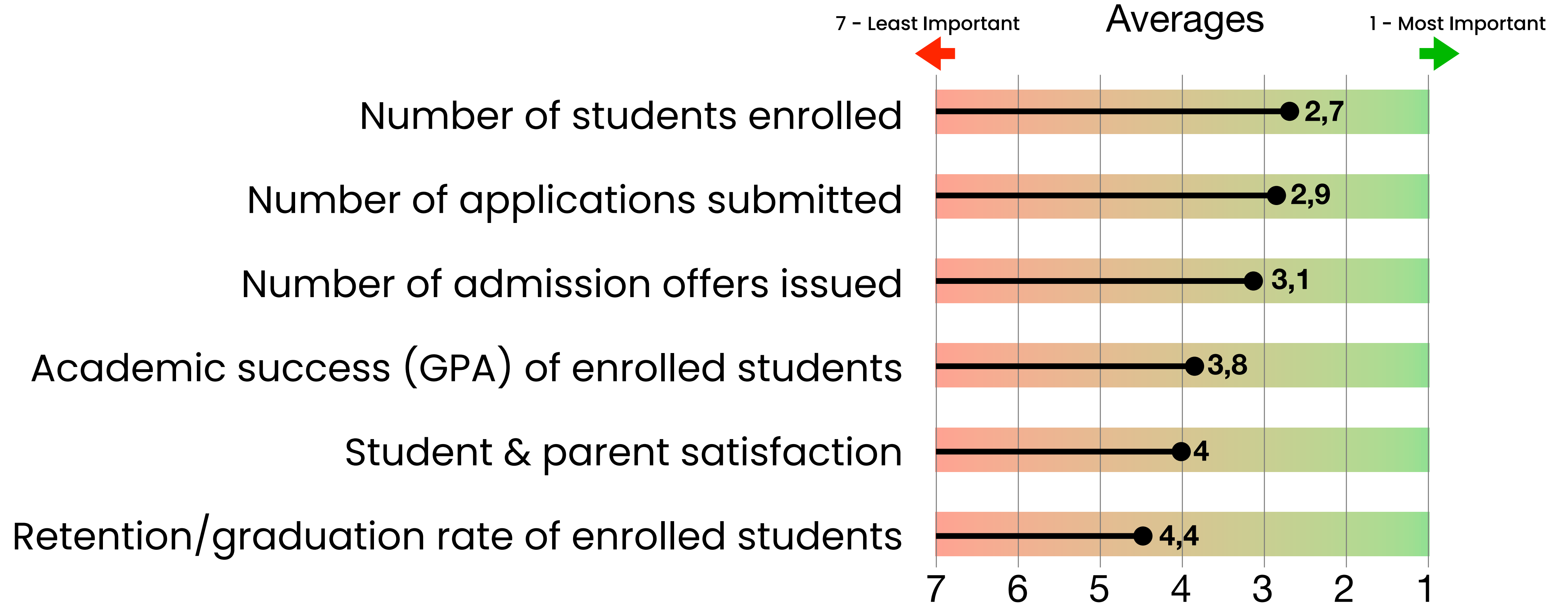
# When partnering with a university, how important are the following support factors?

Answered by 303 out of 303



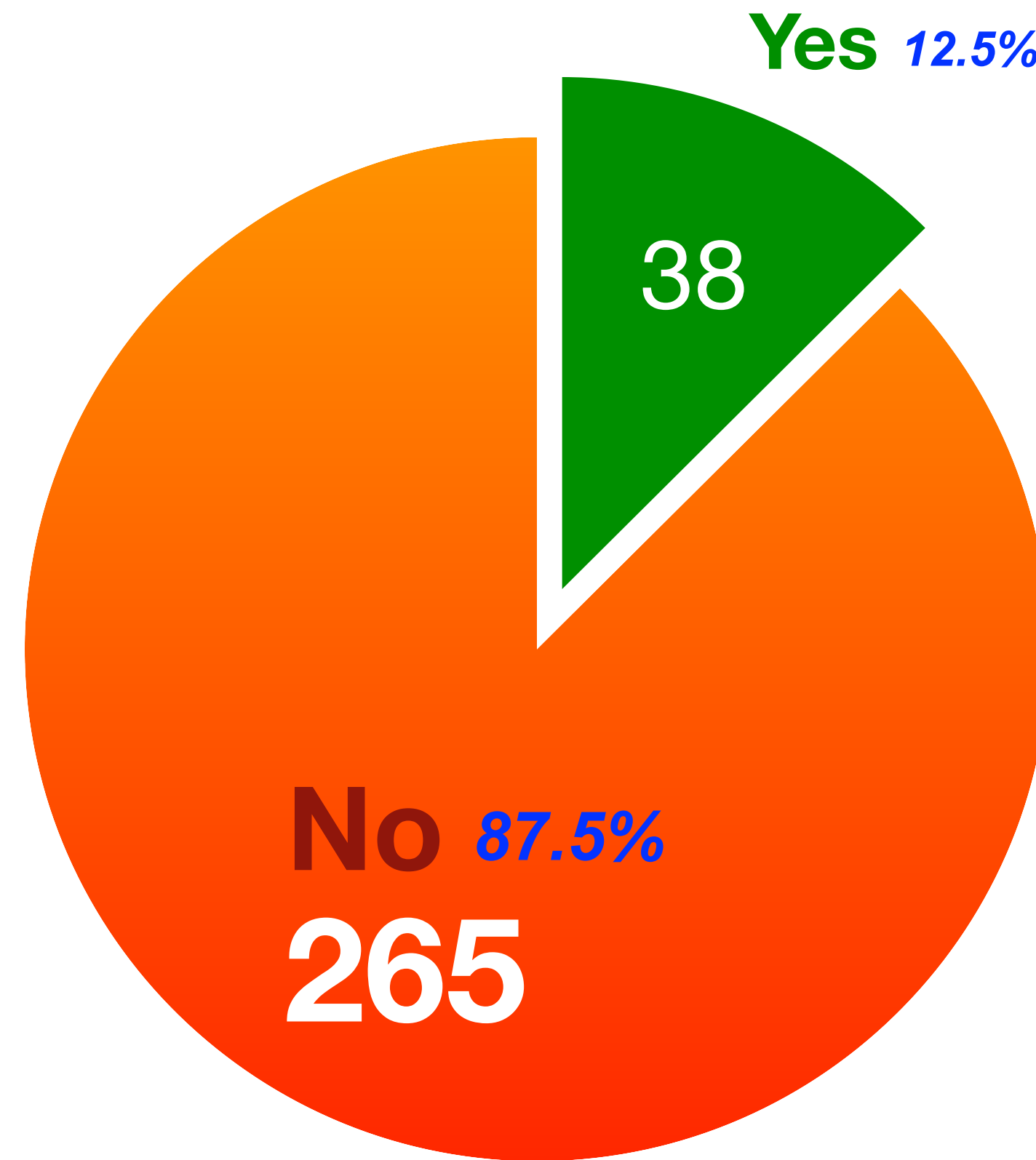
# From what perspective would you prefer your performance to be evaluated by a university partner

Answered by 303 out of 303



# Has your agency ever formally partnered with a Japanese university?

Answered by 303 out of 303

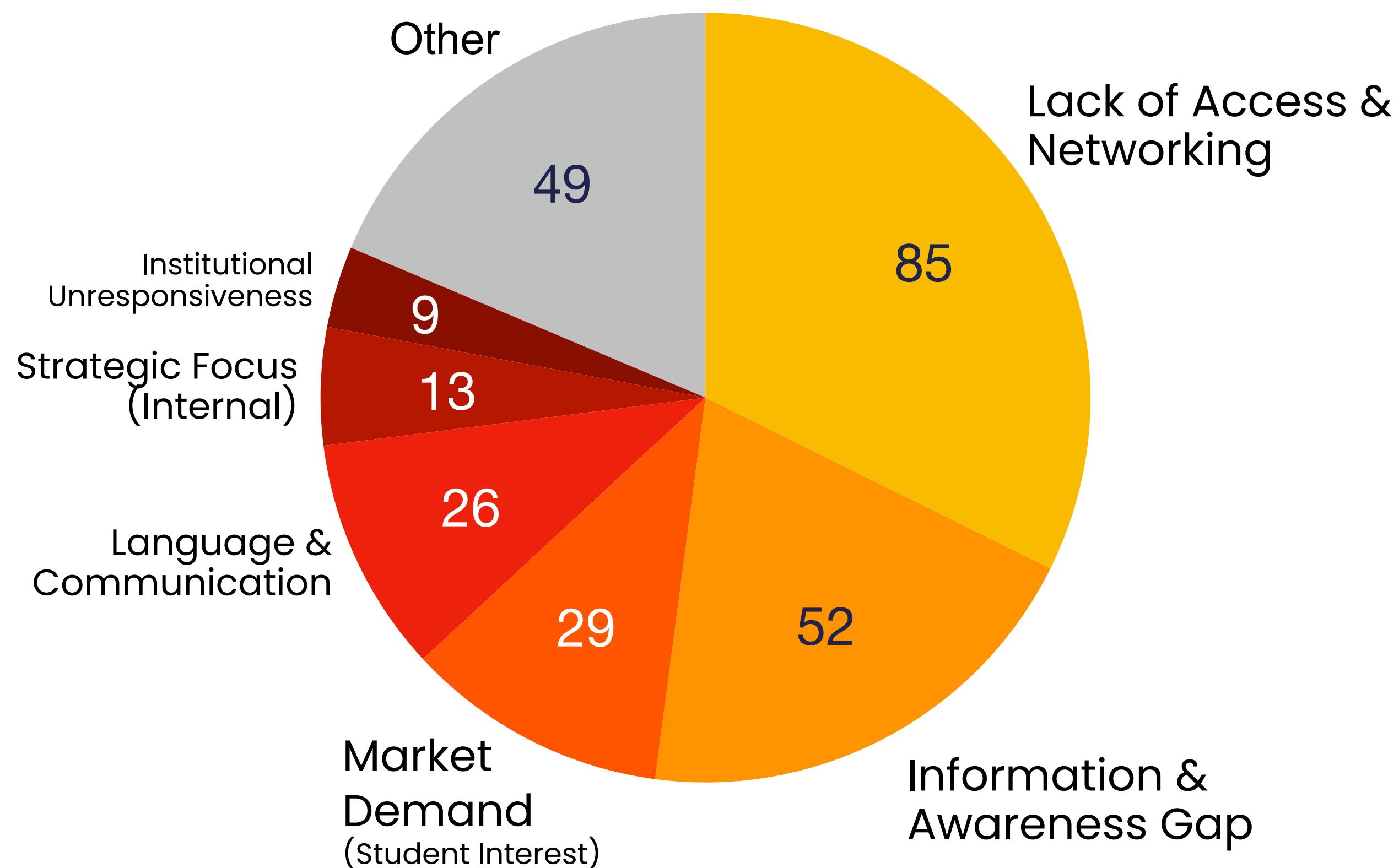


15a

For those who answered 'No' to question 14

# What has been the main reason for not yet partnering with a Japanese institution?

Answered by 263 out of 265



## Quotes from survey responses

### Lack of Access & Networking

- I have never met with a Japanese school who wants to cooperate. No Access.
- It is difficult to connect with Japanese institutions, as they don't attend many conferences.
- We have not had the opportunities of meeting schools from Japan.

### Information & Awareness Gap

- The main reason was that we didn't have enough information about Japanese universities, particularly the selection process for African students.
- Lack of information regarding English taught programs & visa process.
- Limited awareness and understanding of Japan's higher education ecosystem, including admission pathways and scholarship options.

### Market Demand (Student Interest)

- Students not showing interests.
- The target market doesn't normally ask about studying in Japan.
- In Türkiye, students want to go to Europe, UK and USA.

### Language & Communication

- Little insight about Japan as a study destination country and language barrier.
- Perception about possible language barrier.

### Strategic Focus (Internal)

- Our focus has previously been on other destination markets, and we are now preparing to expand into Japan.
- Our specialisation has been different... our focus has been on Australia as our primary study destination.

### Institutional Unresponsiveness

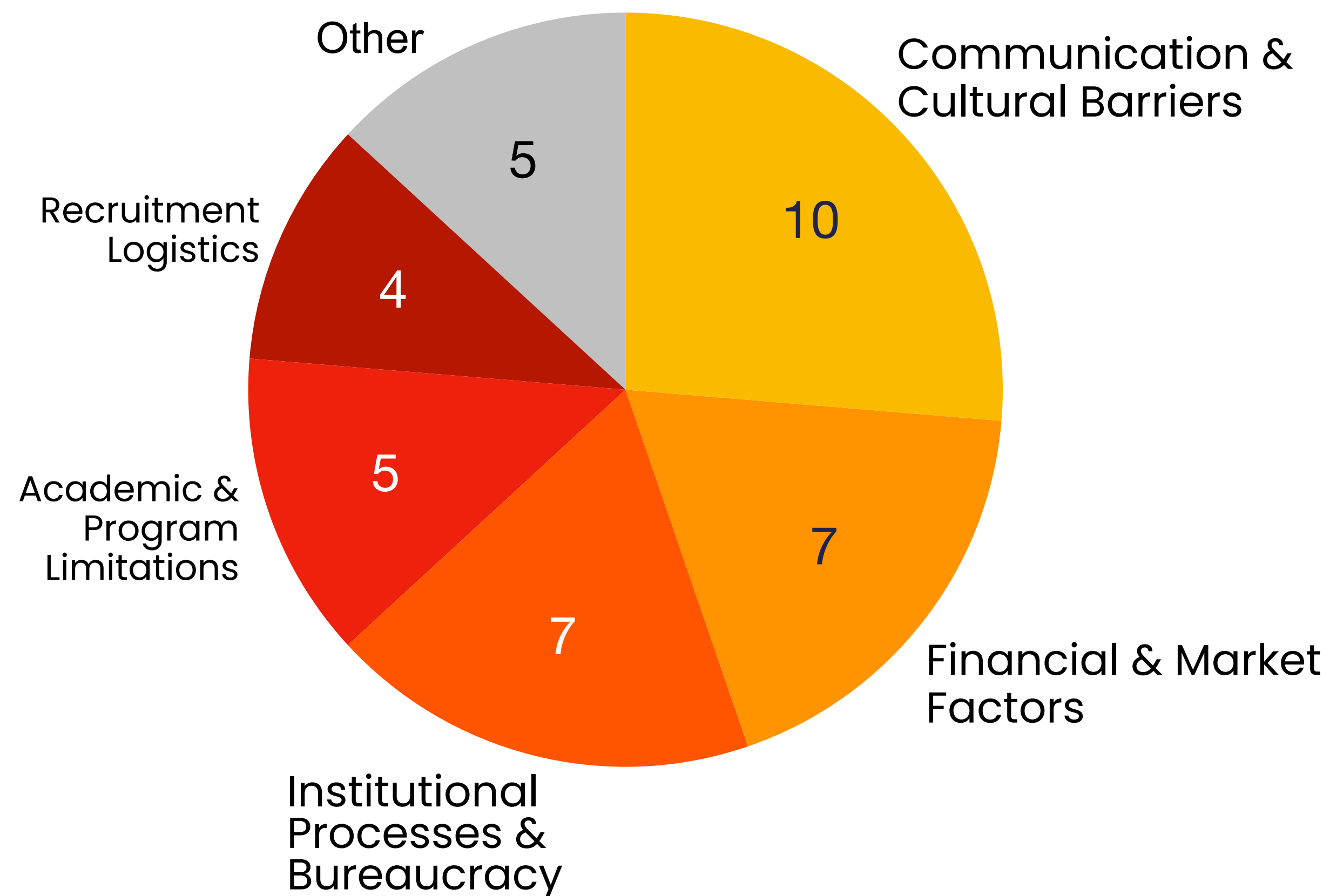
- Partnership proposal submitted but no response.
- We have emailed most universities in Japan for partnership but none of them ever responded till now.

15b

For those who answered 'Yes' to question 14

# What was the biggest challenge in that partnership?

Answered by 38 out of 38



## Quotes from survey responses

### Communication & Cultural Barriers

- Time difference between Japan and Turkey, different bank systems and currency.
- Language (Japanese) / Language barrier.

### Financial & Market Factors

- Gaining university trust that we can recruit quality students.
- Finding scholarship suitable for students.

### Institutional Processes & Bureaucracy

- Japanese universities are not used to work with agents and commission/marketing plans based agreements... they're slow in taking decisions, there's a lot of bureaucracy.
- Slow communication, more rigid application guidelines, not willing to pay commissions.

### Academic & Program Limitations

- Our students look for universities in Japan that offer courses in English, but aside from a few international faculties, acquiring Japanese is essential, so not many students apply.
- They don't have Master's programme.

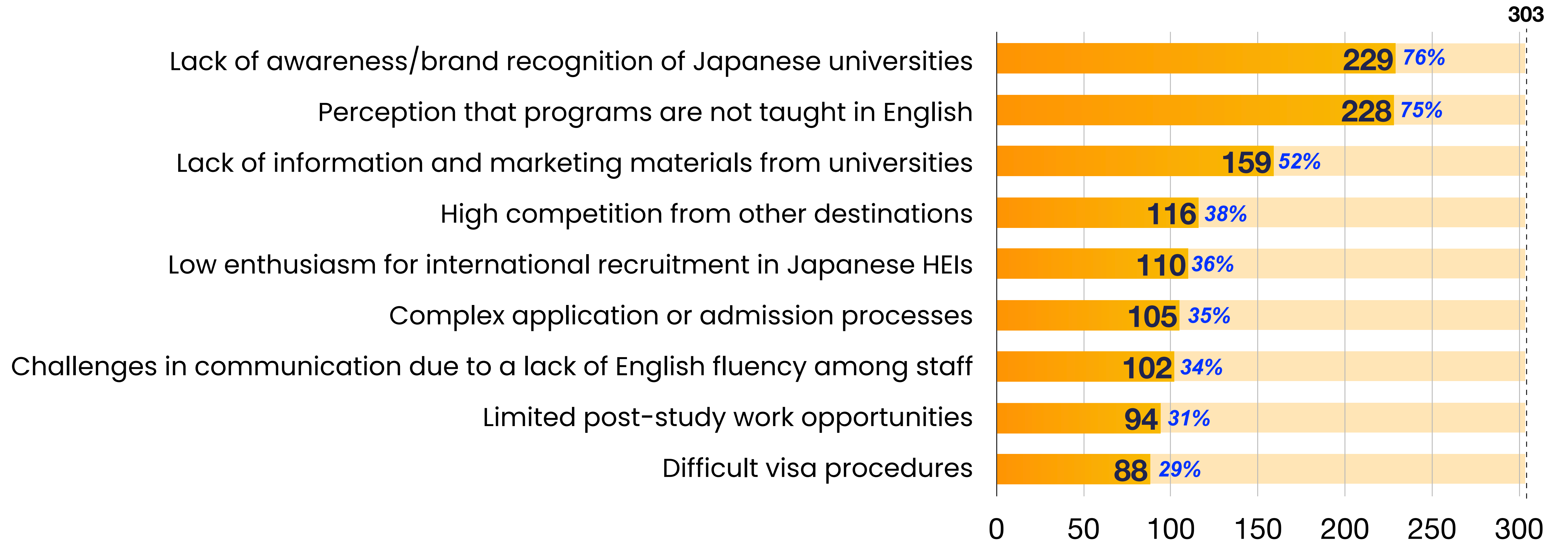
### Recruitment Logistics

- Getting students to go to the university because of location.
- Because of the covid-19 I was facing the challenges for conducting Language class.

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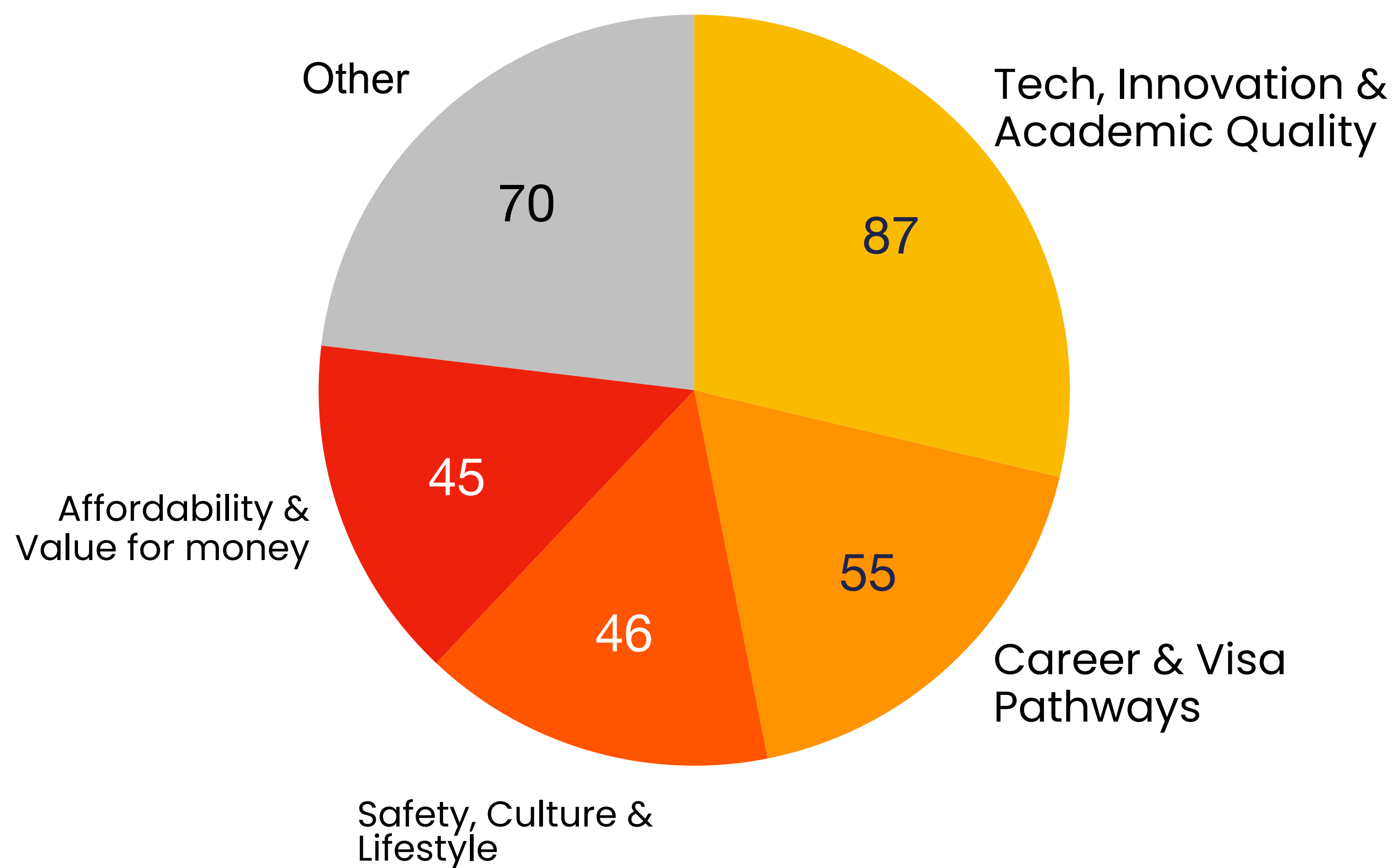
# From your perspective, what are the main challenges when promoting Japan as a study destination in your market?

Answered by 303 out of 303



# What is Japan's single greatest selling point or advantage for students in your market?

Answered by 303 out of 303



## Quotes from survey responses

### Tech, Innovation & Academic Quality

- *Japan's single greatest selling point for students in my market is its globally renowned reputation for technological innovation and high-quality education, especially in engineering, IT, robotics, and advanced sciences.*
- *Students view a Japanese qualification as industry-oriented, research-focused, and closely connected to real-world technology and innovation ecosystems.*

### Career & Visa Pathways

- *Japan's biggest advantage isn't just culture or technology — it's that Japanese education is directly linked to real job opportunities in high-growth industries.*
- *Japan offers affordable education in a developed country with strong post-study job opportunities due to its growing skilled-worker demand.*

### Safety, Culture & Lifestyle

- *Japan offers students an extremely safe environment, high educational standards, and a unique cultural experience that fosters independence, respect, discipline, and a global mindset.*
- *Japan's greatest advantage in our market is its rich, unique, and globally admired culture, which strongly attracts students seeking meaningful learning experiences.*

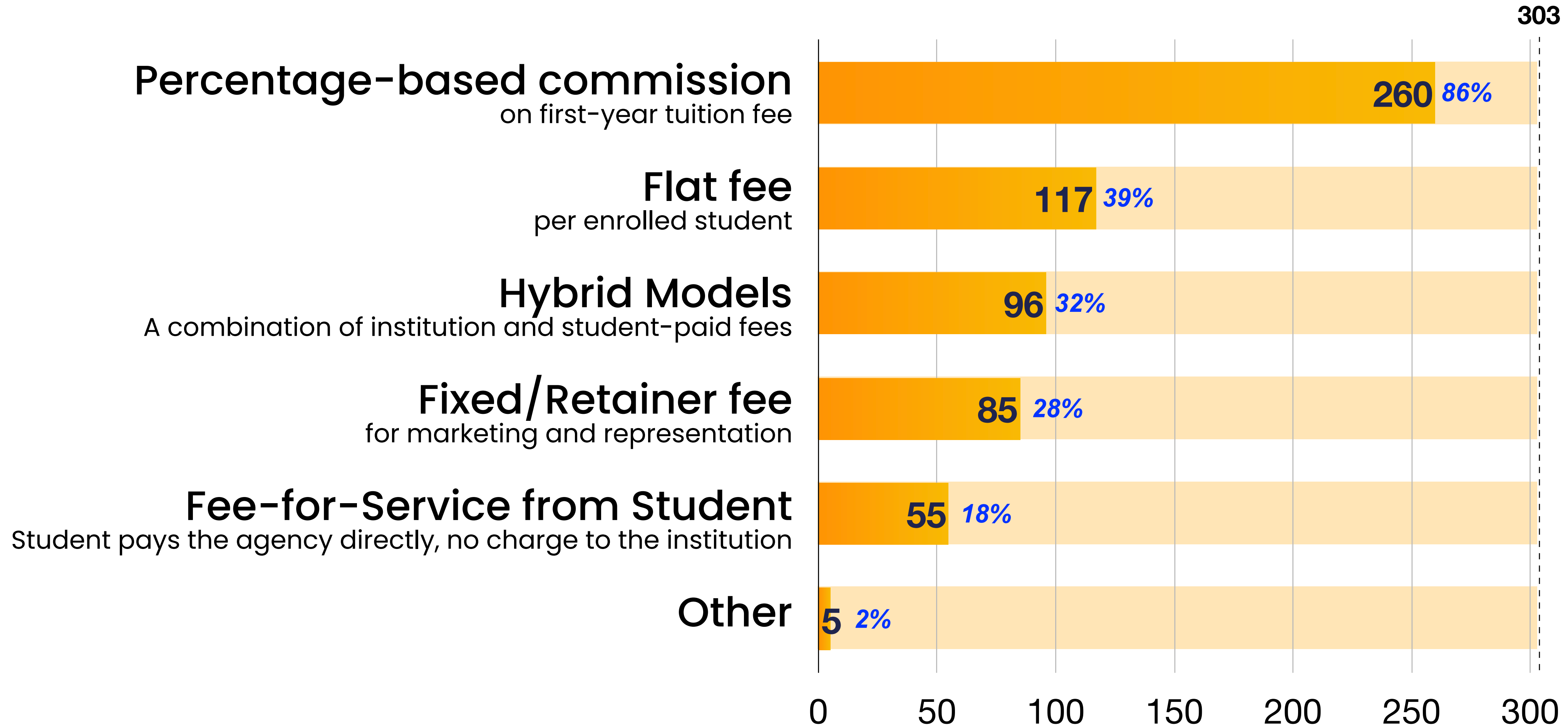
### Affordability & Value for money

- *Japan's single greatest selling point is its unmatched combination of world-class technology/engineering education and extremely affordable study + living costs compared to other top destinations.*
- *More so, the tuition fees of their schools are relatively lower than UK, USA and Canada or Germany.*

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# Which of the following commission or business models does your agency typically work with?

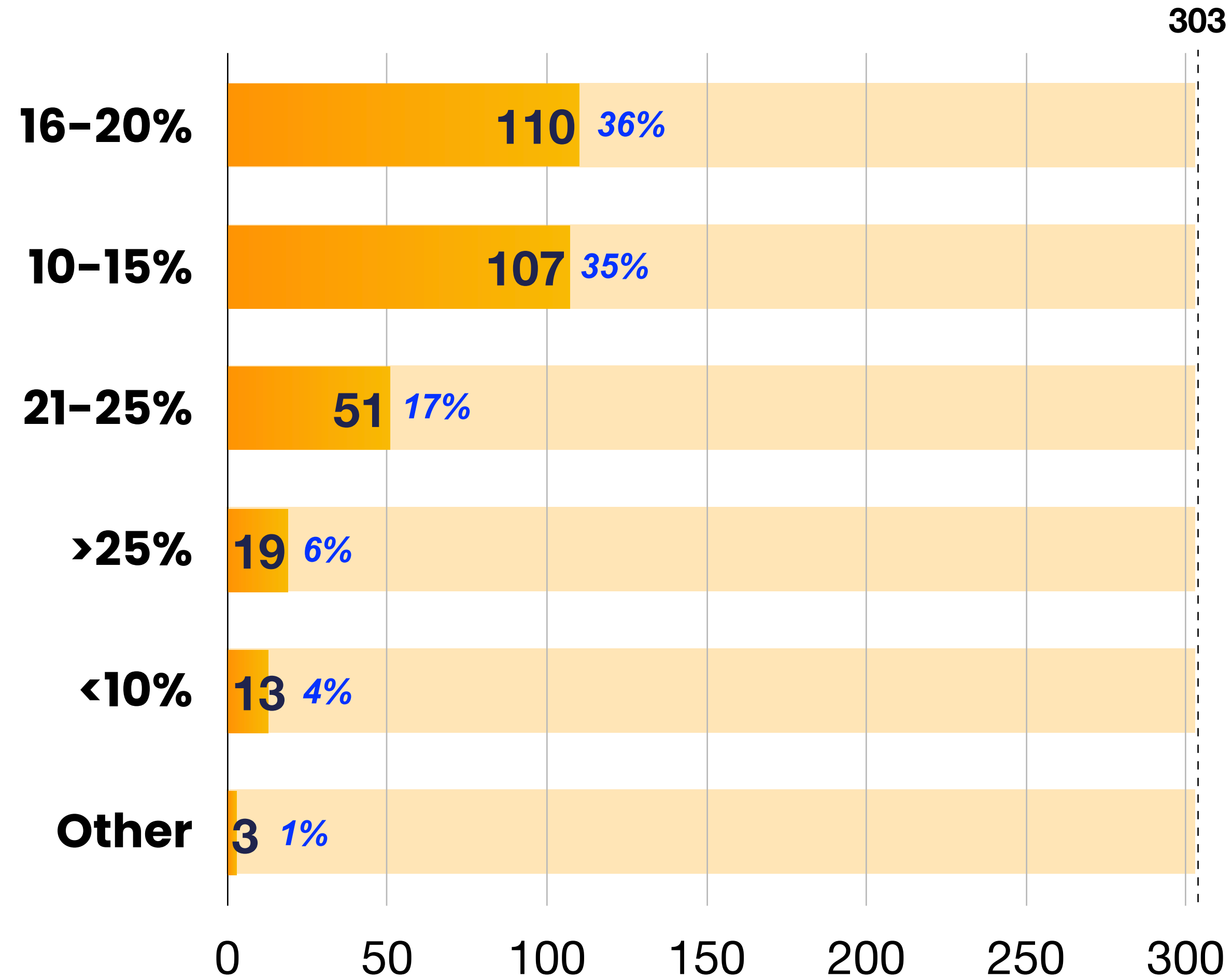
Answered by 303 out of 303



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If you work on a percentage basis, what is a typical commission rate for a new university partner?

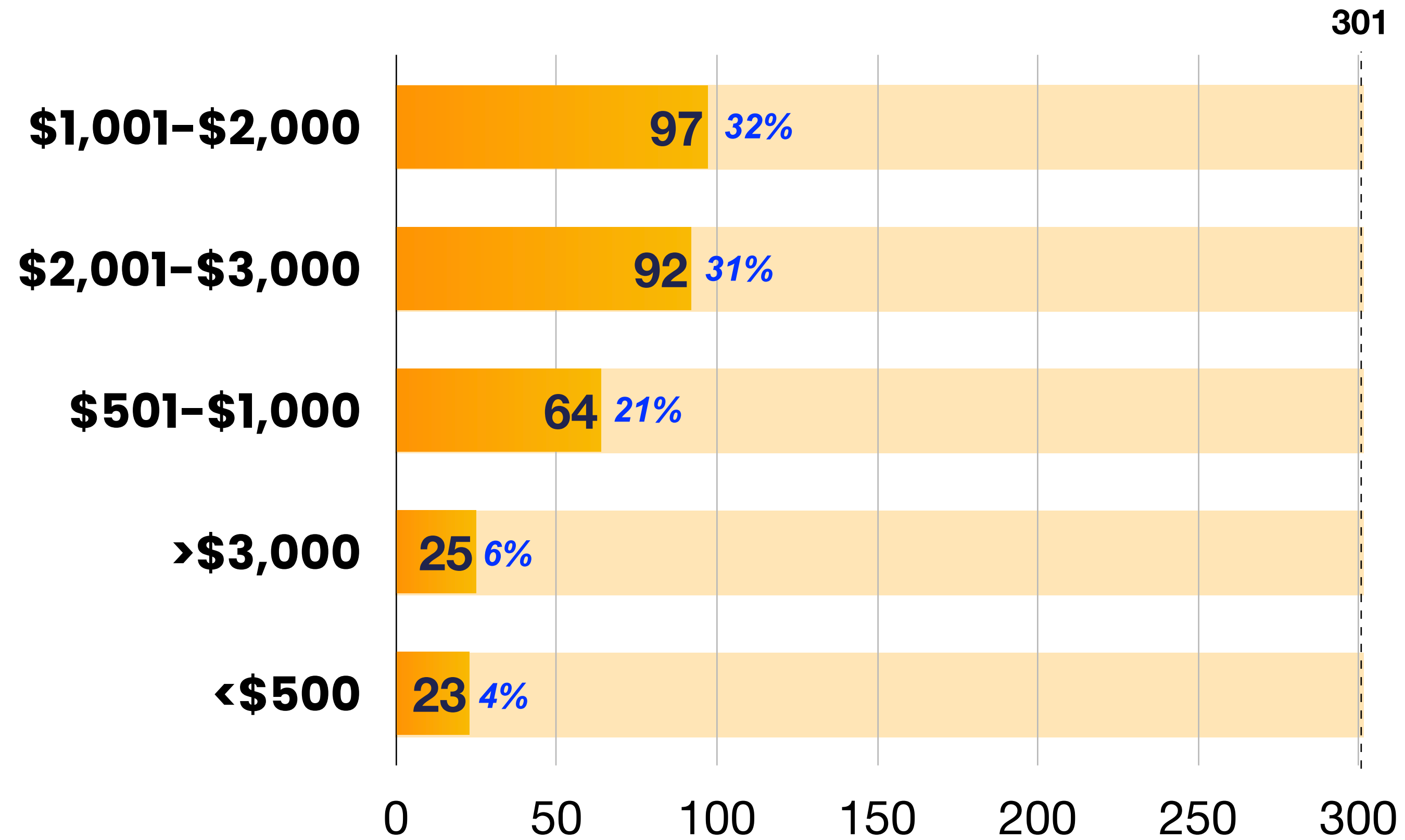
Answered by 303 out of 303



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If you work on a flat fee per enrolment, what is a reasonable fee (in USD)?

Answered by 301 out of 303



# Are there any other comments regarding Japan as a study destination that you feel are important for this research?

Answered by 159 out of 303

## Distribution of Primary Recurring Themes in Open-Ended Responses

This table illustrates the frequency of key thematic mentions within the 159 qualitative responses provided, alongside the resulting strategic implications for the Japanese market.

Key Insight / Term	Frequency (# Mentions)	Core Implication
'Work' / 'Job' / 'Career' / 'Employability'	52	The 'ROI' of the degree is the #1 student motivator.
'Information' / 'Awareness' / 'Marketing'	38	Japan is a 'respected but unknown' brand.
'English' / 'English-Taught'	34	English is no longer a 'nice to have'; it is a market requirement.
'Visa' / 'Admission' / 'Processing'	31	Administrative friction is a major 'leak' in the recruitment funnel.
'Safety' / 'Safe'	18	Safety is one of the main selling points for parents.

## Authors

# Global Agency Perspectives on Japan

Quantitative Research | March 2026



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As Chief Business Development Officer at ICEF, Martijn leads global growth initiatives with a strategic focus on the evolving study destinations of East and Southeast Asia. Holding a degree in Japanese and having lived and worked in Tokyo, his deep professional and personal ties to the country were the primary catalyst for this research into Japan's international talent ambitions and opportunities.



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Hiroshi Ota is a Professor at the Center for General Education at Hitotsubashi University and a leading researcher on Japanese higher education policy and international student mobility. He serves as a senior advisor to this research project, providing the critical policy context and institutional perspective necessary to bridge the gap between global agencies and Japanese universities.



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Megumi directs ICEF's operations in Japan, managing strategic partnerships between local educators, global agencies, and key industry associations. Her deep expertise in the domestic market and her commitment to sector development were instrumental in aligning this research with the specific needs of Japanese institutions.



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