CATALYST GEM

# TURNING AGENT INSIGHTS INTO INSTITUTIONAL ADVANTAGE IN A VOLATILE GLOBAL RECRUITMENT ENVIRONMENT

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This report is grounded in direct feedback from international recruitment agents actively managing U.S. application pipelines. It addresses a central question for institutional leaders: what are agents seeing in the market today, and how should institutions adjust strategy and operations to remain competitive through 2026?

# INTRODUCTION

International enrollment has long been a strategic pillar of U.S. higher education. As international students pursue academic opportunity and long-term career advancement, U.S. institutions have become increasingly reliant on global demand to generate economic impact and sustain institutional stability amid tightening domestic pipelines.

Today, however, global student mobility is more volatile and competitive than at any point in recent history. It is within this context that this report leverages insights from Catalyst GEM's international agent survey and ongoing market engagement to provide U.S. universities with a clear, actionable view of current recruitment dynamics.

By situating agent feedback within broader market and operating conditions, the report identifies sources of friction, emerging risk, and points of leverage that institutions must address as they plan for upcoming recruitment cycles, including 2026 and beyond.

The findings are clear: while near-term demand for U.S. study has softened, long-term interest remains resilient, with execution quality and end-to-end student support serving as the primary engines of conversion. Institutions that reduce friction and align recruitment operations with market realities will be best positioned to compete, convert demand, and sustain international enrollment performance.

# MARKET CONTEXT: A MORE COMPETITIVE AND VOLATILE LANDSCAPE

### GLOBAL DEMAND REMAINS STRONG, BUT ACCESS IS CONDITIONAL

Global demand for international education remains structurally strong. Global student mobility is projected to exceed 8.5 million students by 2030 (QS Global Student Flows, 2025), while the Institute of International Education's Outlook 2030 projects U.S. international enrollment to range between 1.3 and 2.0 million students by the end of the decade across conservative, steady, and robust growth scenarios (IIE, 2024).

However, access to this growth is increasingly conditional. For institutional leaders, this means adapting recruitment strategies and operating models to rising uncertainty and execution risk to convert demand into predictable enrollment outcomes.

## A FUNDAMENTAL SHIFT IN STUDENT DECISION-MAKING

### INTERNATIONAL STUDENTS' DECISIONS ARE NOW GOVERNED BY RISK AND RETURN, NOT ASPIRATION.

Students now evaluate international study as a high-stakes investment with long-term financial and career implications, weighing predictability and safety, cost and value, visa risk, and post-study outcomes.

## COMPETITION BETWEEN DESTINATIONS IS ACCELERATING

### GLOBAL COMPETITIVENESS IS NOW DEFINED BY EXECUTION, NOT PRESTIGE. INSTITUTIONS AND DESTINATIONS THAT DELIVER PREDICTABLE OUTCOMES ARE GAINING SHARE AS LEGACY REPUTATION ALONE LOSES ITS ADVANTAGE.

With a wider range of viable destinations, students increasingly evaluate countries based on tangible outcomes rather than academic reputation alone. This shift is intensifying competition across traditional English-speaking markets, the "Big Four" (the United States, the United Kingdom, Canada, and Australia), as well as emerging alternatives where clearer processes and greater policy stability offer a decisive advantage. As a result, global competitiveness is now shaped less by prestige and more by execution, favoring destinations that reduce uncertainty and deliver predictable student pathways. This structural shift limits institutions' ability to rely on legacy positioning and underscores the need for proactive, long-term strategic planning.

## AGENT ATTENTION HAS BECOME A STRATEGIC BATTLEGROUND

### THE CENTER OF GRAVITY IN INTERNATIONAL RECRUITMENT IS AGENT INSIGHT. RECRUITMENT HAS SHIFTED FROM VOLUME TO PRIORITIZATION, WHERE CLARITY, SPEED, AND RELIABILITY DETERMINE VISIBILITY WITHIN AGENT PORTFOLIOS.

Universities have long relied on agents as a primary channel for international recruitment, and for good reason. Agents sit at the center of student decision-making. In today's market, however, agent-mediated recruitment can no longer be approached as a volume - driven activity.Agents manage crowded portfolios and actively prioritize institutions that deliver clarity, speed, and operational reliability. In practice, this means agents translate institutional uncertainty into destination shifts, redirecting students toward options that feel safer and more predictable.

As competition intensifies, U.S. institutions must deliberately earn, and continuously sustain, agent engagement. Agent prioritization ultimately determines how, and whether, institutions are positioned to students at the point of decision. Institutions that fail to adapt risk becoming passive participants within agent networks, limiting their visibility and competing primarily on brand or price.

**Effective institutional responses consistently include:**

- Clear, consistent communication and expectation-setting
- Streamlined admissions workflows with predictable decision timelines
- High-quality market-facing materials and ongoing counselor training
- Structured visa preparation frameworks and student readiness support

# AGENT-LED MARKET SIGNALS

The insights in this section are drawn from a structured analysis distributed to international recruitment agencies of varying sizes that are actively recruiting for US universities. A total of 50 agencies completed our survey, reflecting a clear and convergent view of the current demand for U.S. study.

The survey examined key factors influencing interest, including comparative positioning against competing destinations, student perceptions, enrollment and visa barriers, confidence in future demand, and the value of institutional and partner support. While not statistically representative of the full global agent ecosystem, respondents reflect a diverse cross-section of active agencies across multiple regions where Catalyst GEM maintains operational engagement. These findings are further validated by consistent signals observed through ongoing collaboration with agent networks, reinforcing the reliability and directional strength of the insights presented.

When asked to compare student demand for the United States with alternative destinations, 41% of respondents reported demand as “a bit lower,” while an additional 35% described it as “significantly lower.” Importantly, this shift does not indicate outright rejection of the U.S. as a study destination; rather, it reflects a combination of structural barriers, student hesitation, and increased risk aversion among students and their families.

## STRUCTURAL BARRIERS LIMITING U.S. ENROLLMENT GROWTH

Agents identify visa confidence as the most significant constraint, cited by 49% of respondents. This challenge is amplified by broader structural and contextual factors captured in the “Other” category (35%), which agents associate with:

- ongoing political and immigration uncertainty, and
- high, non-waived application fees that require early financial commitment in an increasingly risk-averse environment.

**Additional barriers include:**

- insufficient budget or scholarship clarity (28.6%),
- slow admissions decision processes (12.2%), and
- missing or limited marketing materials (8.2%).

Collectively, these factors increase friction at precisely the point in the decision-making process when students are most sensitive to risk.

## STUDENT HESITATION DRIVERS

**From the agent perspective, student hesitation is primarily driven by:**

- reduced confidence in the F-1 visa process (51%),
- perceptions of the U.S. political and social climate (24%), and
- uncertainty surrounding post-graduation work opportunities (14%).

These concerns directly shape how students evaluate the viability of the United States relative to competing destinations.

## RESULTING PERCEPTION OF U.S. STUDY

**As a result, agents report a notable deterioration in student perception of studying in the United States:**

- 53% describe perceptions as somewhat negative, and
- 10% as very negative

Critically, agents emphasize that this perception risk is procedural rather than academic. Students continue to value the quality of U.S. education but are pausing, reassessing alternatives, and seeking greater assurance before committing.

These findings align with broader sector sentiment. As NAFSA CEO Fanta Aw has noted, "The problem isn't that students have lost confidence in the quality of U.S. education; they have lost confidence in the administration's commitment to international students."

## PRIORITIES FOR THE NEXT QUARTER

When asked about their immediate operational priorities, agents consistently highlighted needs related to top-of-funnel quality, mid-funnel conversion, and visa readiness. This concentration underscores where agents experience the greatest friction and where institutional support delivers the highest impact. It also indicates a growing awareness of the cost of poor conversion, with agents increasingly willing to invest time and attention in universities that demonstrably reduce risk and uncertainty through structured support.

Institutions that align support strategies, responsiveness, and expectations to this operational cadence are easier to prioritize within agent portfolios. In contrast, misalignment introduces execution risk that agents actively avoid.

## STRATEGIC IMPLICATIONS FOR INSTITUTIONS

Taken together, these findings point to a clear execution gap. Demand for U.S. education has not disappeared; however, institutions are increasingly constrained by fragmented processes, inconsistent agent enablement, and reactive support models that fail to reduce risk at scale. In this environment, institutions relying on isolated interventions no longer generate sufficient enrollment outcomes.

Agents consistently favor universities that deliver cohesive, end-to-end support aligned with how recruitment operates on the ground. Catalyst GEM was built specifically to support institutions in this environment through a structured and scalable operating model.

# ABOUT CATALYST GEM

Catalyst GEM works alongside U.S. higher education leaders, navigating unprecedented volatility in international enrollment. We are a U.S.-based software and services partner with deep expertise in global student recruitment, helping institutions stabilize pipelines, reduce risk, and convert demand into enrolled students in an increasingly uncertain market.

Our model is fully managed, transparent, and technology-enabled. More importantly, it is built around how international recruitment actually works today. We combine proprietary technology with hands-on expertise to operate as a strategic advisor and connector, aligning recruitment strategy, operational execution, and student readiness into a single, integrated engine.

By reducing friction across these interconnected stages, we help institutions move from reactive recruitment to predictable, plannable performance. The result is stronger conversion, greater institutional resilience, enhanced long-term stability, and global pipelines that compound over time.

Catalyst GEM is also a proud Service Provider Member of AIRC (The Association of International Enrollment Management) for 2025-2026, reflecting our commitment to ethical, transparent recruitment practices and continuous improvement.


# WHAT WE DO

## EXPAND GLOBAL ENROLLMENT WITH FOCUS AND CLARITY

Expanding global reach remains a core challenge for higher education institutions across both online and F-1 recruitment models. We support institutions in competing where it matters most by activating priority markets and structuring recruitment channels intentionally aligned with each institution's strategy and operating model, including agencies, academic institutions, corporate & government entities, and direct-demand channels.

As a strategic growth partner, we help institutions build scalable recruitment ecosystems and reduce dependence on single-market approaches or misaligned, low-performing channels.

## MANAGE THE FULL LEAD-TO-APPLICATION LIFECYCLE

Catalyst GEM enables institutions to engage prospective students directly through student-first marketing and an integrated, multi-channel media strategy. More than passive lead generation, our model converts brand awareness into qualified applications. Through our proprietary technology platform, we provide end-to-end lead and application management for both online and F-1 programs, aligned with each institution's portfolio and recruitment objectives.

Powered by QualifAI, the system supports lead nurturing, application development, and pre-admissions triage, while ensuring institution-owned data, transparent attribution, and full visibility across student touchpoints.

## STREAMLINE ADMISSIONS AND ACCELERATE CONVERSION

Speed and clarity are critical to student decision-making across both online and F-1 programs. QualifAI, our institution-branded technology platform, delivers verified, review-ready international applications directly into institutional systems within 24-48 hours.

This reduces manual workload, accelerates decision timelines, improves conversion at scale, and enables admissions teams to focus on applicant engagement, maximizing enrollment yield without adding internal complexity.

## STRENGTHEN F-1 VISA OUTCOMES WITH CONFIDENCE

Visa uncertainty has become a critical yield risk for institutions targeting F-1 recruitment. Catalyst GEM delivers a structured F-1 visa preparation program through a nine-unit online course, with each unit covering a critical aspect of the F-1 visa process and reinforced by self-assessment tools to test knowledge and readiness. The program ensures students approach the visa interview with confidence and a clear understanding of requirements.

This foundation is complemented by mock visa interviews, expert-led webinars, and personalized support, alongside profile assessments that identify strengths and risk factors influencing consular outcomes. By addressing identified gaps and improving interview performance, the program maximizes the likelihood of F-1 visa approval while enabling institutions to achieve higher approval rates, improved yield, and greater predictability in F-1 enrollment planning.

# ALIGNMENT WITH CATALYST GEM CAPABILITIES

## MARKET VALIDATION

The insights in this report align closely with Catalyst GEM's operating model and validate its impact across the international recruitment ecosystem. From the agent perspective, survey data confirms broad exposure to multiple Catalyst GEM services, reflecting a multi-touch engagement model rather than isolated interactions.

Agents report that the services and support Catalyst GEM provides, on behalf of partner institutions, are both well received and materially improve recruitment effectiveness.

This is reinforced by agent ratings: when asked to evaluate service value on a 1–5 scale, Catalyst GEM achieved an overall average score of 4.39 out of 5, underscoring the effectiveness of its integrated support model, the high level of trust placed in Catalyst GEM as an intermediary, and the positive impact delivered to the institutions it represents.

**Qualitative feedback consistently highlights Catalyst GEM's ability to:**

- Deliver personalized, responsive support and clear communication
- Reduce operational friction and administrative delays
- Produce cleaner applications and more efficient recruitment pipelines
- Strengthen counselor capability through high-value training and content
- Provide actionable market intelligence that supports informed decision-making

This validation matters not only as proof of performance, but as evidence that agents respond positively to structured support models that simplify their work.

Collectively, these elements position Catalyst GEM as a strategic service partner that enhances agent effectiveness, strengthens recruitment outcomes, and helps institutions optimize their international sales channels through stronger agent-led student conversion.

## AGENT TESTIMONIALS

"Catalyst GEM excels at building strong relationships with universities and students by providing timely guidance, clear communication, and personalized support. The team's regular training sessions and proactive engagement with agents help maintain high standards and ensure that partners and applicants are well-informed."

**- Crizac Limited**

"You guys are amazing at communication and partnership! It's always easy to reach you, and the support feels genuinely personal. The Catalyst GEM platform also makes things clear and organized, which saves a lot of time."

**- StudyCare Morocco**

"Catalyst GEM has been particularly effective in creatin a strong ecosystem for consultants like Eguras Consulting to learn, connect, and grow."

**- Eguras Consulting**

"The universities represented by Catalyst GEM are very good, and the process is easy. We also receive proper training and support."

**- Matrix Immigration and Visa Services**

"Catalyst GEM is playing a very good role in terms of university collaborations, and we are extremely happy with your services."

**- Global Navigators Overseas Education Consultants**

## DEMAND FOR BROADER INSTITUTIONAL ENGAGEMENT

Survey findings also reveal exceptionally strong interest in expanding U.S. university pipelines through Catalyst GEM, particularly when institutions are operationally prepared to provide the support needed. Agents expressed a high level of interest in partnering with additional U.S. institutions via Catalyst GEM, with an average interest score of 4.71 out of 5, signaling strong confidence in our operating model and readiness for deeper institutional engagement.

For universities, this represents a clear opportunity to activate a recruitment capacity through stronger alignment, operational preparedness, and consistent execution, supported by Catalyst GEM.

# WHAT WE'VE LEARNED FROM WORKING WITH AGENTS

Beyond the survey findings, Catalyst GEM's ongoing engagement with agent networks highlights and reinforces a set of operational insights that institutions can directly apply to improve recruitment performance.

### Agent Engagement Determines Enrollment Priority

Agents may sign contracts with many institutions, but they actively prioritize and drive enrollment for those that invest in the partnership. Post-signing engagement, such as university participation in agent events, office visits, and direct collaboration, is viewed as essential. Institutions that remain visible and engaged are more effectively positioned within agent portfolios. Absence after signing is perceived as a missed opportunity for relationship-building and limits agents' ability and willingness to effectively promote the institution.

### Agents Optimize for Predictability

Agents move fastest when institutions provide clear eligibility criteria, standardized documentation requirements, transparent timelines, predictable decisions, and consistent follow-up. Predictability reduces risk and increases agent confidence, enabling faster movement through the recruitment funnel and higher-quality student guidance.

### Agents Deprioritize Complexity

Agent pipelines slow or stall when institutions introduce frequent requirement changes, excessive documentation requests, high non-refundable application fees, delayed decisions, or inconsistent communication. Complexity directly reduces agent prioritization. Institutions that minimize friction are easier to sell, safer to recommend, and more likely to receive sustained agent attention.

### Materials and Training Function as Performance Infrastructure

High-performing agents rely on strong training, clear program and ROI messaging, and well-defined differentiation around outcomes, affordability, and student support. Effective recruitment outcomes depend on an agent's ability to clearly articulate a university's unique value proposition. Knowledge gaps or inadequate marketing materials undermine credibility, while consistent brand messaging and program familiarity materially improve conversion.

# WHAT LEADERS SHOULD DO NOW

International enrollment remains one of the most powerful drivers of institutional growth, diversification, and long-term sustainability, but how that growth is earned has fundamentally changed. Historic source markets, legacy partnerships, and past operating models no longer deliver stable pipelines on their own. The volatility institutions face today is not cyclical; it reflects a structural shift that will define recruitment performance in 2026 and beyond.

In this environment, market intelligence has become a source of advantage, not just risk management. Real-time insight into agent behavior, student confidence, and pipeline friction now enables institutions to make sharper decisions, prioritize investments, and act with greater confidence amid uncertainty.

For senior leaders, the question is no longer whether to adapt, but how quickly they can translate insight into execution.

## Leadership Imperatives for 2026

**Diversify market exposure with intent**

Reduce concentration risk in traditional markets while opening new, strategically aligned growth lanes.

**Enable agents as a strategic channel**

Training, updates, market-facing materials, and responsive support are not optional, they are core conversion infrastructure.

**Design for predictability**

Build admissions and onboarding systems that can adapt quickly to volatility, supported by clear internal SLAs and transparent student communications.

**Simplify operations and increase transparency**

Reduce friction across admissions and application processes to improve speed, predictability, and yield.

**Embed visa readiness into the operating model**

Begin structured preparation at the offer/I-20 stage, capture readiness signals early, and intervene before risk compounds.

This moment calls for leadership that is both disciplined and forward-looking. Institutions that align strategy with execution, embedding international recruitment into multi-year institutional plans with defined targets, dedicated budgets, and decisions grounded in real-time market intelligence, are already positioning themselves to stabilize enrollment, build momentum, strengthen long-term global relevance, and protect financial continuity.

# PARTNERING FOR IMPACT

The international education market is not contracting; it is recalibrating. In this context, effective strategy requires institutions to reassess how internal capabilities are deployed to manage risk across the international enrollment lifecycle. Addressing the pain points identified in this report is central to that effort. As a result, building and sustaining trust across the recruitment ecosystem has become a decisive source of competitive advantage.

Catalyst GEM is already operating at the center of these priorities. Through a unified, technology-enabled model, we help institutions move from reactive recruitment to disciplined, intelligence-driven execution, reducing friction across the enrollment lifecycle while improving yield, ROI, and predictability. As complexity rises, institutions that simplify execution gain a decisive advantage. Catalyst GEM is built to deliver that advantage.

This report reflects what we are seeing, and doing, in the market today: capturing real-time agent and student intelligence, translating signals into action, and helping institutions lead through volatility rather than respond to it. Universities working with Catalyst GEM are not waiting for stability to return, they are building it. We are proud to partner with institutions already taking that step forward, and ready to help others do the same.

## CONNECT WITH US


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**Protect Your Enrollment**

# SOURCES

External sources referenced in this report provide macro-level context on international mobility dynamics. Agent sentiment and operational insights are derived from Catalyst GEM's 2025 internal survey and ongoing market engagement.


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