

UK & EUROPE

State of Student Recruitment

 **KEYSTONE**
EDUCATION GROUP



Introduction

Our annual State of Student Recruitment Report provides increasingly crucial insight into the world of prospective students. How are students thinking about studying abroad, and how can we help them make their dreams come true?

Take a look behind the scenes of the student journey with data from 10,846 prospective students representing 150+ countries. They shared their motivations for studying abroad in Europe, first considerations, financial and safety concerns, and how they find institutions and programs.

Our year-on-year comparisons can help you understand how student behaviour is changing. What has changed for students in 2023?

Let's find out!



Jan 2023



Data collection started

Apr 2023



Survey closed with 23,856 global respondents

May 2023



Analysis of data and year-on-year trends

October 2023



Breakdown of data for students who want to study in Europe

Insights within this report are prepared for illustrative purposes only and are not intended for use as scientific evidence of causation or behavior. Data points do not add up to 100% when a selection of multiple options were available.

Student Data Overview



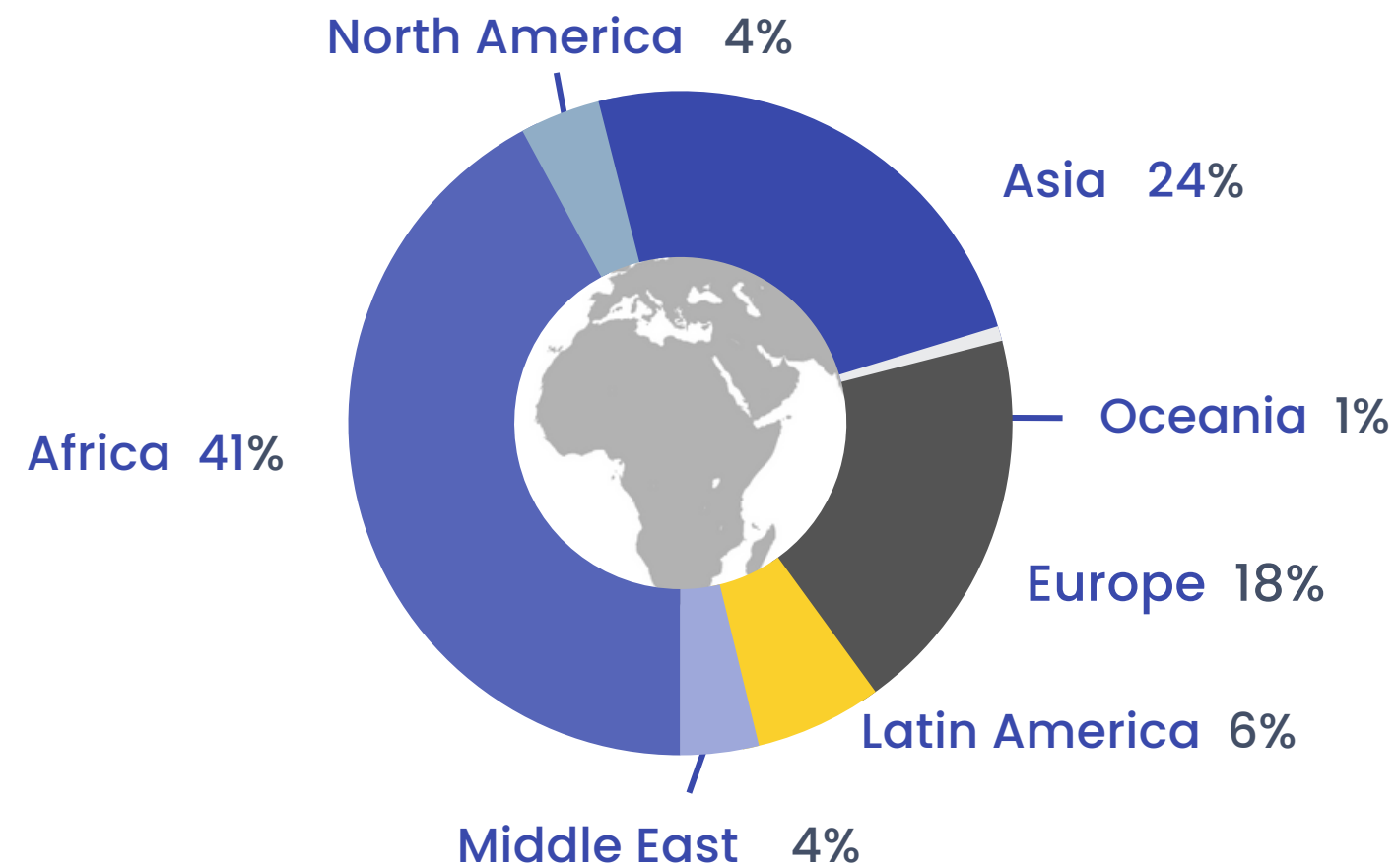
10,846

Respondents - prospective students who want to study internationally in Europe

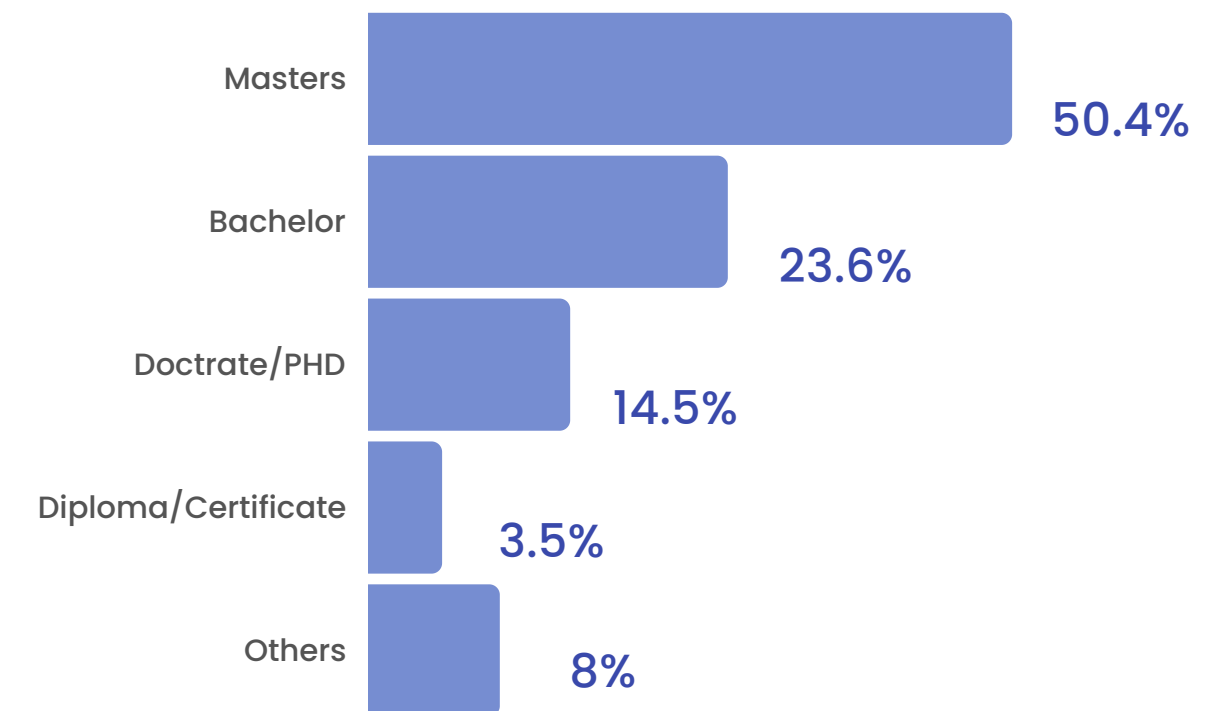
Age

26-35	31.1%
22-25	24.0%
18-21	19.3%
36-45	12.5%
U18	7.6%

Represented nationalities



Desired study Level



Study Preferences



Top study destinations in Europe

		compared to 2022	global ranking
 The UK	16.1%	-1.2%	3
 Germany	12%	+41.2%	4
 Italy	8%	+14%	6
 France	7%	+25%	7
 Netherlands	5.6%	-42%	8
 Sweden	5.5%	+61.8%	9
 Spain	4.8%	-25%	10
 Finland	3.5%	+75%	11

**Globally: 1st is Canada, 2nd is the US, 5th is Australia*

Europe as a destination has experienced a slight popularity dip

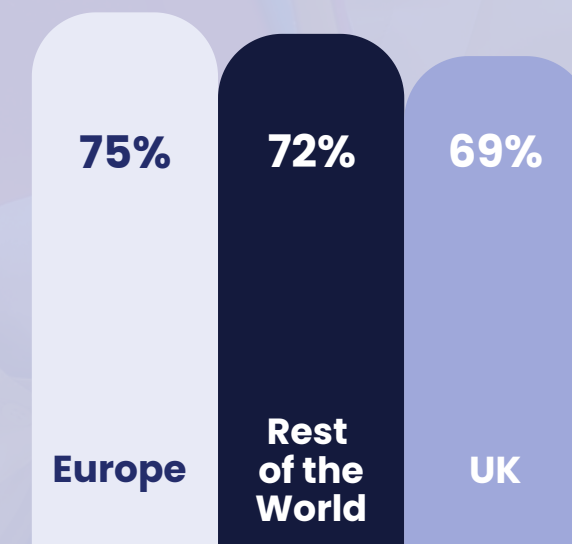
From 2021 to 2023, we have seen a 18% decrease in students who want to study abroad in Europe.

In this period instead we have seen Canada and Australia grow in popularity.

The 'most welcoming' destinations

We asked prospective international students (postgraduate) how welcoming different regions are perceived to be.

Europe is perceived to be more welcoming than 'the rest of the world', but the UK is perceived to be slightly less welcoming than both.



Insights from our webinar experts:



 **Netherlands -42%**

Amaranta Luna Arteaga

Marketing, Recruitment & International Relations Manager
University of Groningen



Webinar host,
Mark Bennett

There have been directives from the government in the Netherlands saying they don't want universities recruiting as heavily internationally, and they don't want to offer as many courses in English.

Does the popularity drop in our data for the Netherlands reflect your experiences?

Amaranta: Most definitely. And the problem is the bill is not passed yet but it has caused a lot of misinformation, and that is what is impacting us the most at the moment.

There was a Ministry of Education consultation this summer... with the shape of the bill being decided after national elections in November.

But we are noticing already that universities are reading this new bill differently, and we don't have a joint strategy on international recruitment. That is damaging us a lot, because [previously] we saw a more joint collaboration between Dutch universities, and now it is creating more competition amongst ourselves and creating a lot of misinformation inside the Netherlands.

So at the University of Groningen, we are not supposed to actively recruit international students as we don't know what is going to happen yet.



 **United Kingdom -1.2%**

Elliot Newstead

Head of UK Student Recruitment and Outreach
University of Leicester



Webinar host,
Mark Bennett

We have also seen policy changes in the UK - mainly students will no longer be able to bring dependents on taught courses. That has a big impact on certain markets, particularly Africa, but also South Asia and India.

How concerning is this for UK universities? Are there any strategies you are considering to mitigate the impact of it?

Elliot: It is definitely a really big concern. Going back to the point of uncertainty we will probably have an uncertain few months.

I think in terms of strategies that we are seeing within the UK market, we are definitely seeing a shift to offer more online provision where possible, but we are having to turn that around quickly if it isn't already in place, so it is proving difficult for certain types of university.

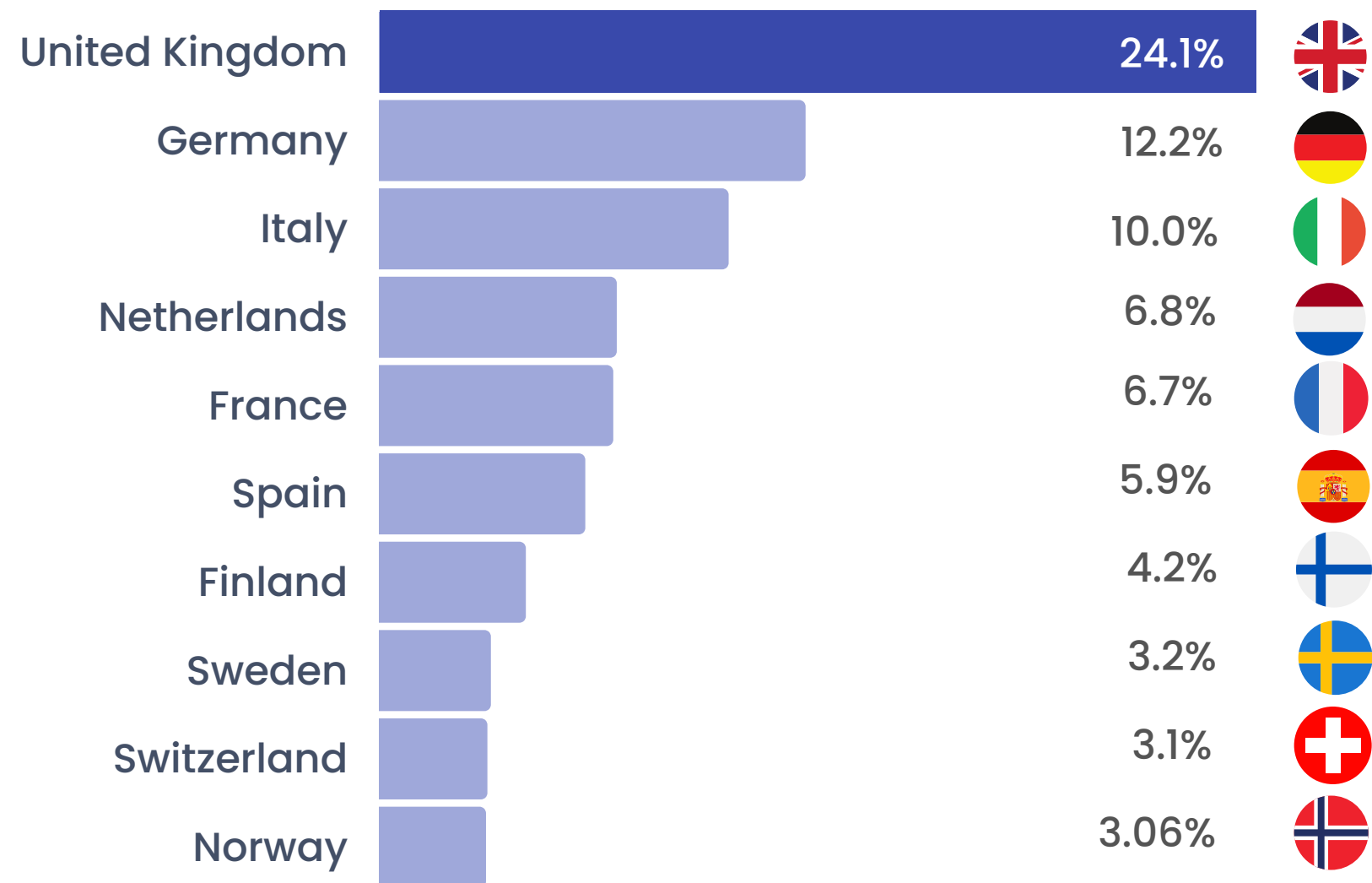
It is a concern particularly for us. We have a big January intake and are pretty active in the markets you mentioned. I am not sure anyone has 'super cracked' it yet.

It will be interesting to see how the next three months plays out, both in seeing students arriving, but also if there are any potential policy reversals or tweaks if we see a real impact on the economic figures over the next four months or so.

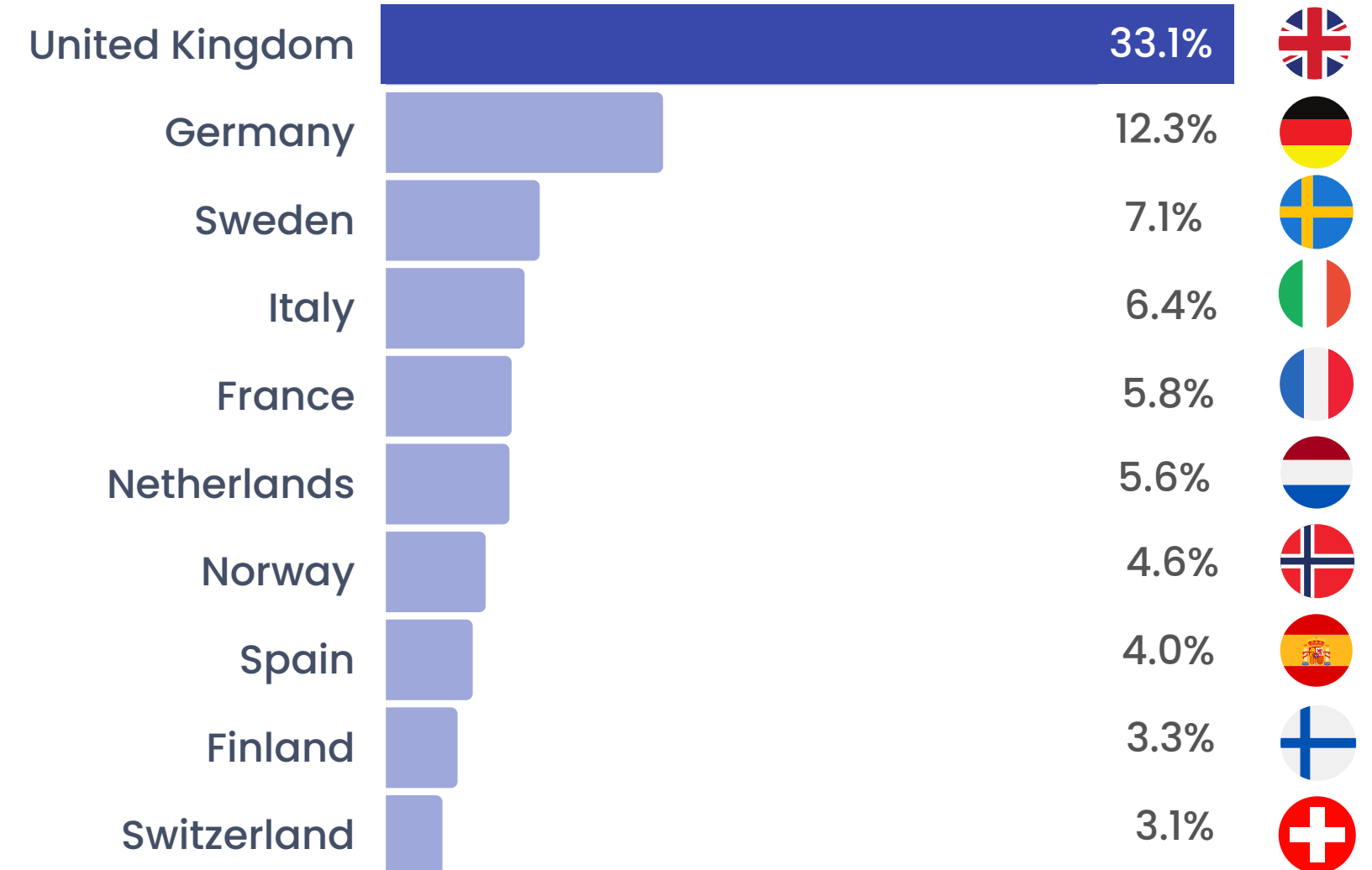
We discussed these topics, and more!, as part of our, **'State of Student Recruitment UK & Europe'** webinar. Hear what our experts had to say and watch back on www.keg.com.

Top study destinations in Europe

Undergraduate top countries



Postgraduate top countries

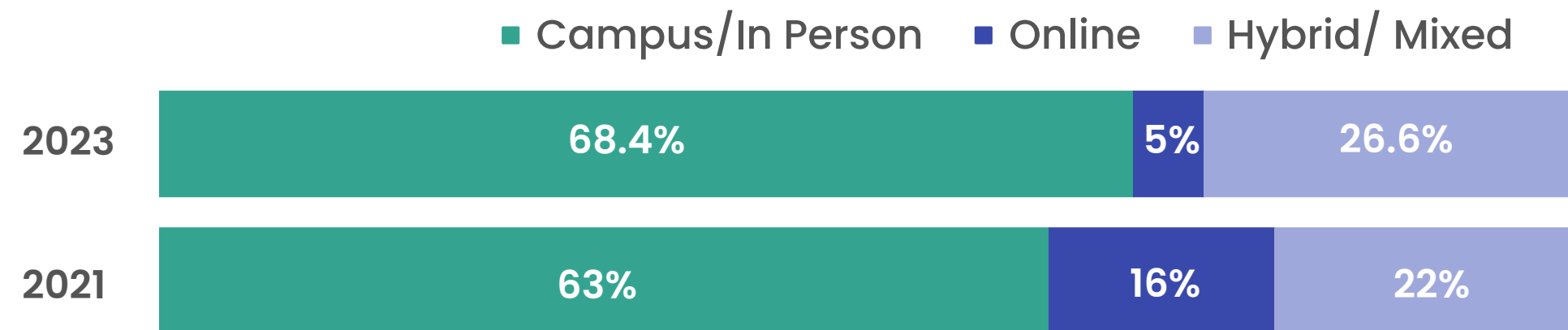


Top study languages for students in Europe

English	84%	German	2.76%
French	6%	Spanish	2.74%

Study Preferences

Which class mode is preferred by students who want to study in Europe?



↘ Demand for online-only learning has decreased by 70% since 2021



Poll!

During our live webinar, we ask our higher education audience to answer our poll question:

'Does your institution offer flexible study options?'

No	41%
Yes	50%
Don't know	9%

151 respondents



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Top motivations for students to study internationally in Europe

In 2023...

Achieve my career goals	53%
Develop myself personally	45%
Experience a new culture	37%
Access higher quality teaching	36%
Study for free or less	20%
Attend a top-ranked university	18%
Widen my network	16%
Learn a new language	12%
Get a visa to live in another country	12%

Noticeable trends or changes to motivations:



Post-study work VISAs

- A key influence for 70% of prospective students.
- Most important for South American and Asian prospective students. Least important for students in East Asia and North America.

“— This is less important for students in East Asia - particularly China, who traditionally are more likely to study, gain their qualification, and not always, but are more likely to return home to work after that. —”



Dr Mark Bennett, Director of Audience & Insights
FindAUniversity, a Keystone company

2 1 3 Importance of rankings: -45%

The importance of the reputation of the institution has decreased by 45% from 2021 to 2023. University ranking is twice as important for Chinese students interested in studying in Europe, compared to Nigerian students.

Motivations change based on where students want to study in Europe



Students who want to study in Spain were the only country in Europe that had 'experience a new culture or lifestyle as their top motivation'.

'Achieve my career goals' dropped to 3rd.



'Achieve my career goals' is also slightly lower for students who want to study in France, 46% voted it as their top motivation, compared to 53% globally.

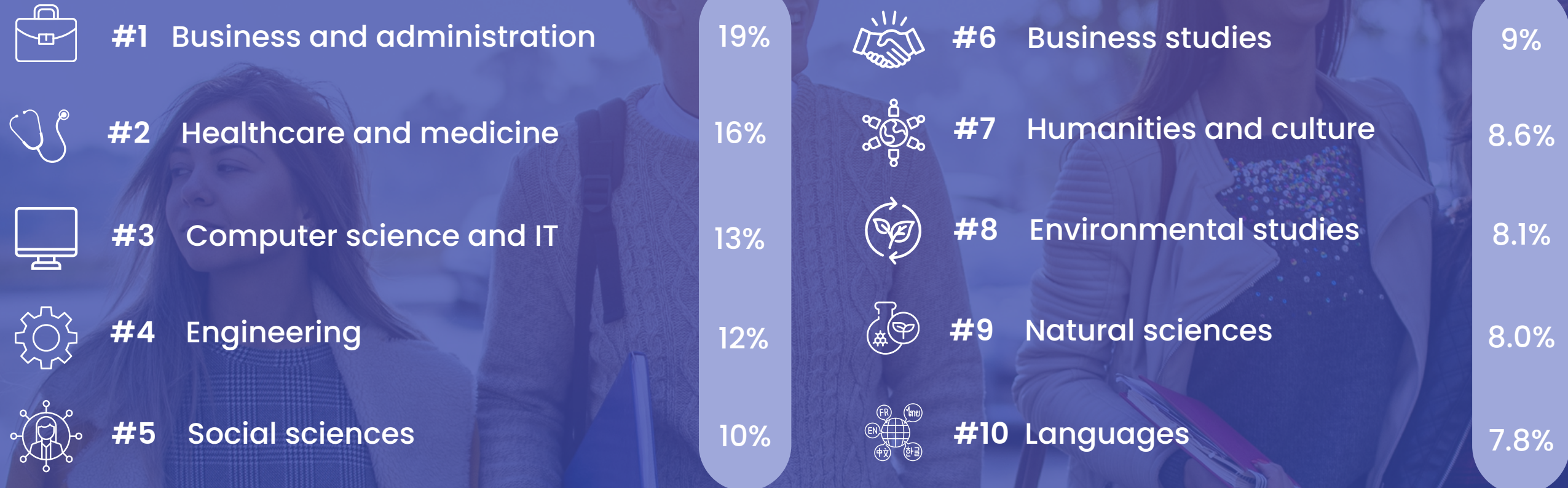


Worldwide (23,800 students surveyed), we saw a 22% decrease in students studying internationally 'to have an adventure'.

Motivations have been shifting towards career-focused rather than 'personal'.

Top Subjects in 2023 for students who want to study in Europe

Results from our 2023 survey of 10,846 respondents...



2021 to 2023 trends

Healthcare and business studies have remained in the top 3 from 2021 to 2023

'Art' and 'Marketing' drop out of the top 10 from 2021 to 2023, and have been replaced by Computer Science and Business Administration.

Data from our 2023 State of Student Recruitment survey

Plus, bonus data! The most searched disciplines on Keystone's student websites July-October 2023...

Student traffic to European institutions

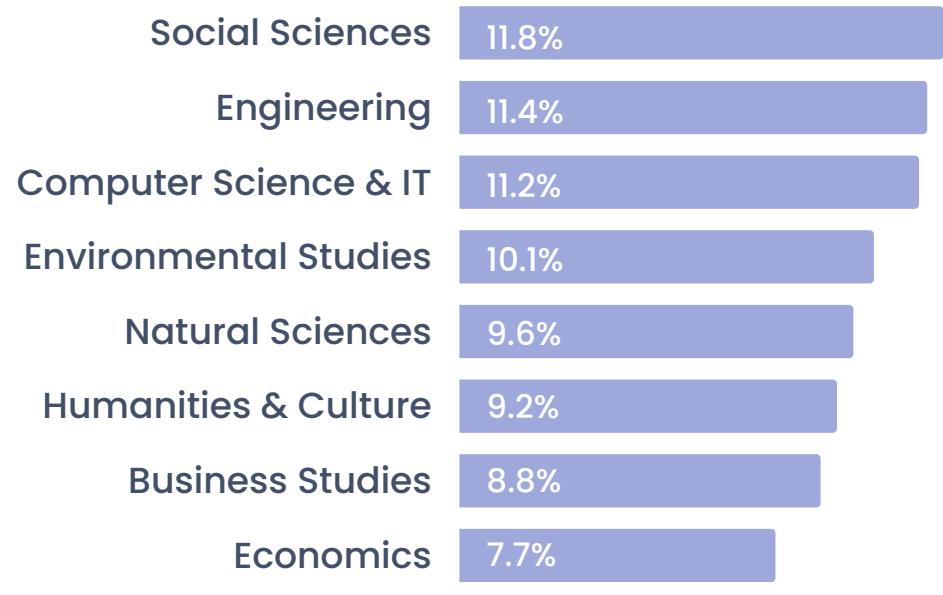
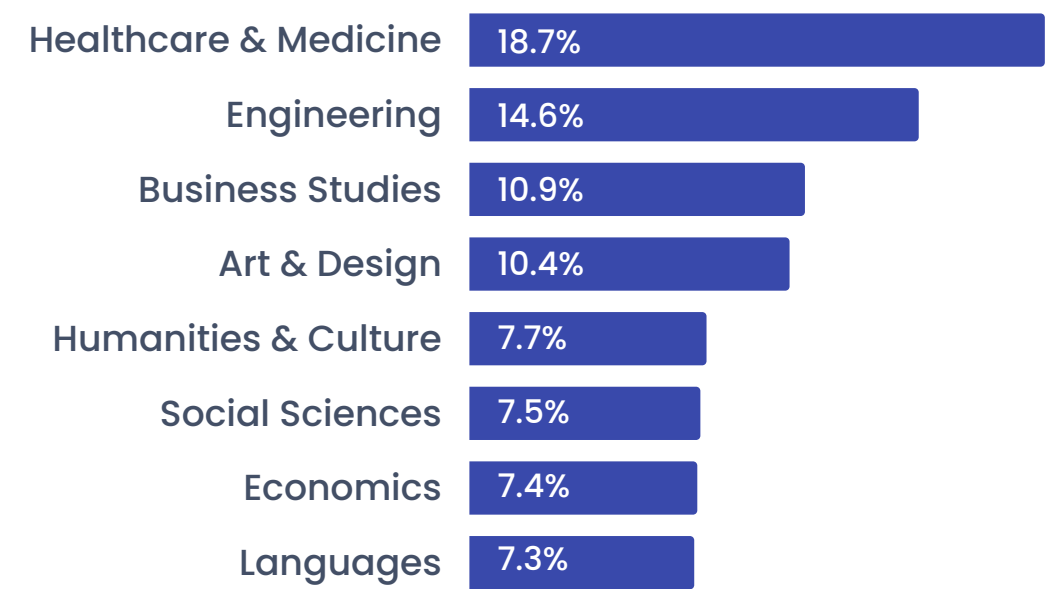
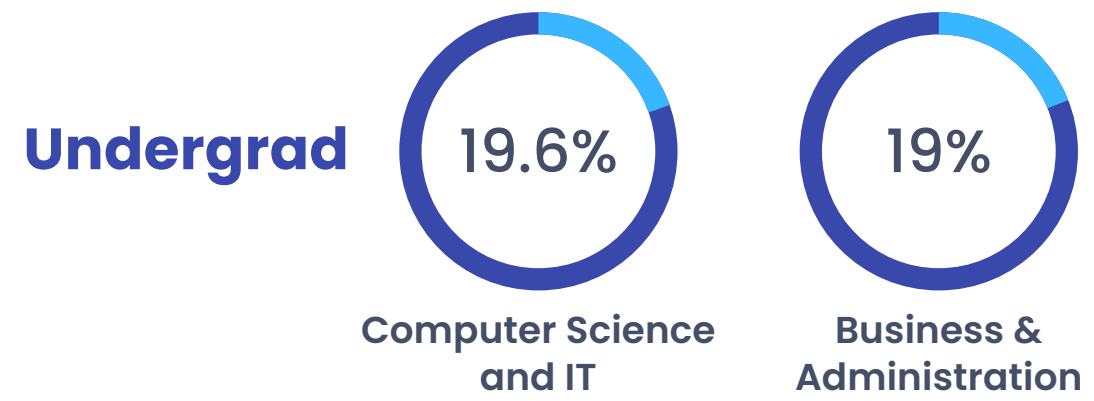
1 Business administration	6 Nursing
2 Psychology	7 Cyber security
3 Architecture	8 Management
4 International relations	9 HR management
5 Digital marketing	10 Computer science

Student traffic to UK institutions

1 Psychology	6 Architecture
2 Business administration	7 Cyber security
3 Law	8 AI
4 Criminology	9 International Relations
5 Nursing	10 Digital marketing

Top Subjects

Undergraduate versus postgraduate



We asked our webinar experts...



Webinar host, Mark Bennett

Are there any subjects you have found increasing in popularity over the last 12 months in the Netherlands?

Amaranta: Students are very interested in extra-curriculars to start working on their career perspectives while they are studying.

But we have noticed here in the Netherlands, there is a demand for future-proof, future-orientated studies that are interdisciplinary.

For example, we have a programme on data science and society, where we look at emerging technologies from governance and law disciplines.

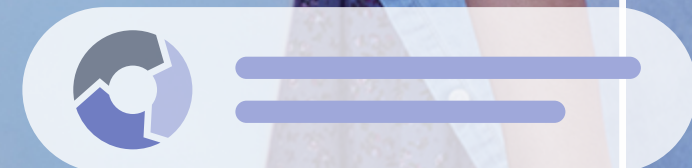
These are the things that students are looking for, but it is also the job. There is a need for these types of profiles in the job market, as well.

So we keep an eye on that and also work a lot with our regional partners.



Amaranta Luna Arteaga
University of Groningen, Netherlands

First Considerations



Most important factors...

...in a programme

35.9%

Internship opportunities

24.2%

Practical curriculum

17.6%

A resume-enhancing program

 **38% increase in importance since 2021**

...in a school

61%

Quality of education & teaching

43.2%

Ability to work & study simultaneously

42.6%

Reputation of the school



What do students who want to study in Europe consider first?

Programme, school or country?

	2023
Programme	55.2%
Country	28.9%
School	16.0%

Globally, and in Europe, we are seeing the 'programme' growing in importance.

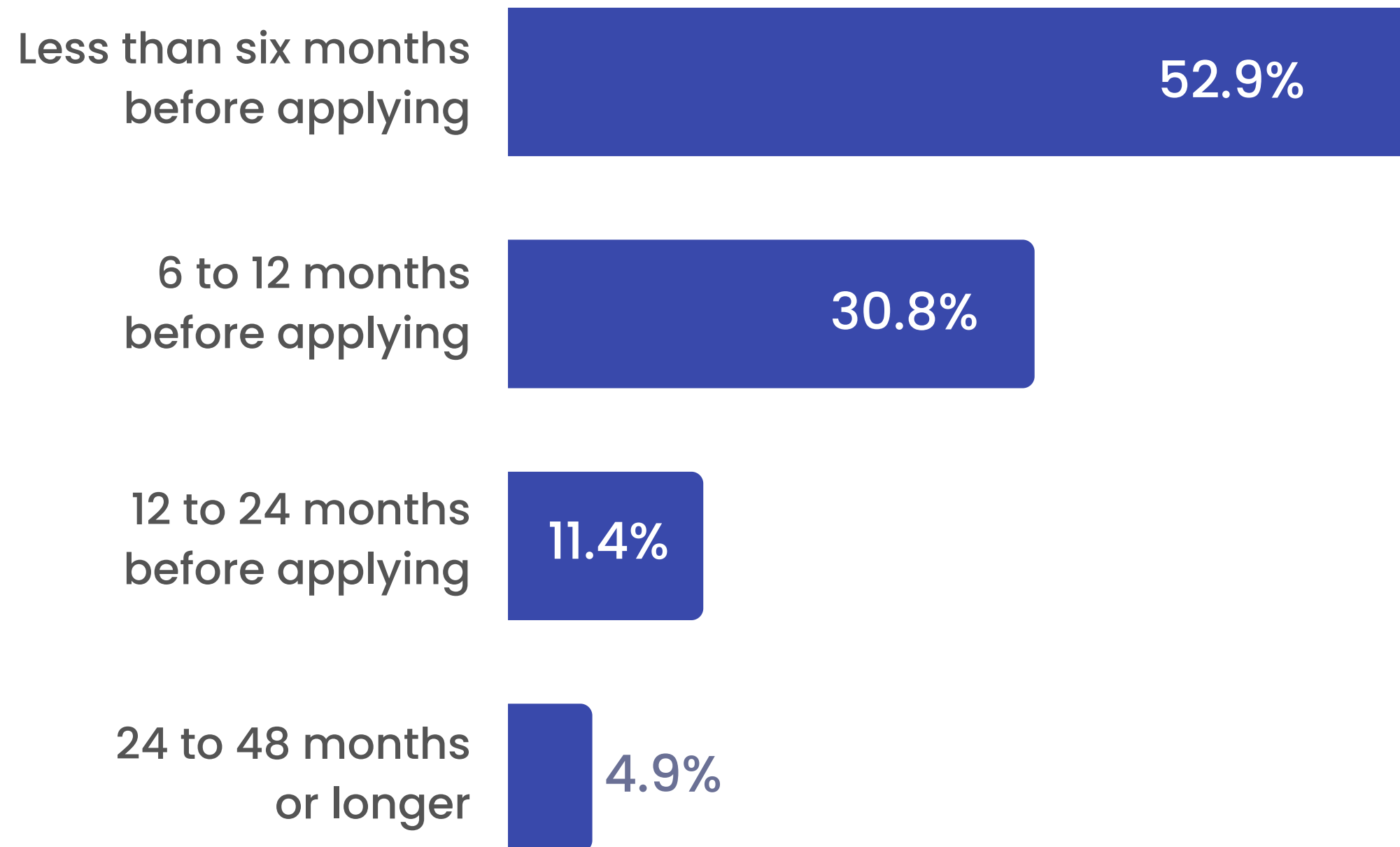
Prospective students are showing more interest in the programme itself than the country they study in, or even the school.

The Student Journey



A shorter student journey

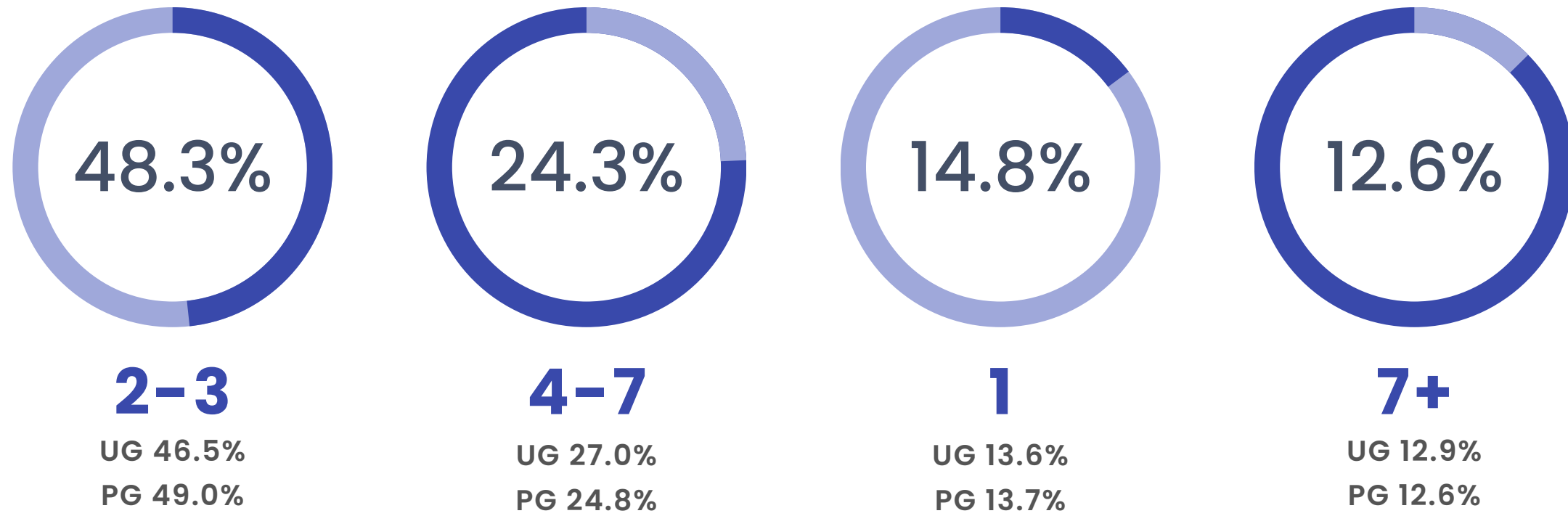
How long did you begin researching before applying?



Study start-dates
Students are focussed on **Spring 2024** starts

Autumn 2024 is also building

How many European universities are you applying to?



UG - undergraduate | PG - postgraduate




Trends from 2021-2023: 26% decrease in students applying to only one institution since 2021 - greater competition for the top students.

We asked our webinar experts...



Finland
Joanna Kumpula
 Tampere University



Webinar host, Mark Bennett

The situation is looking competitive, we are seeing a 26% decrease in students applying to only one university.

Are you experiencing a greater competition for students than two years ago?

Joanna: For me, I think this is what I would expect from any of our applicants - that they would definitely apply, and I would even encourage them [to apply to more universities].

I think nowadays with the application process being so much more simplified and online, compared to long ago, the ease of applying also enables students to really look at more options.

I would say in Finland, students are definitely applying to more than 2-3 universities. Especially when it comes to engineering students, they're applying to maybe every Finish university, so three or four at least.

Watch the webinar on demand at www.keg.com

Research & communications







What tools do you use to research study options?

- 01** Search online
i.e. Google
- 02** University listings platforms
i.e. masterstudies.com
- 03** Social media
- 04** Word of mouth
- 05** Online community groups
i.e. Facebook, Quora

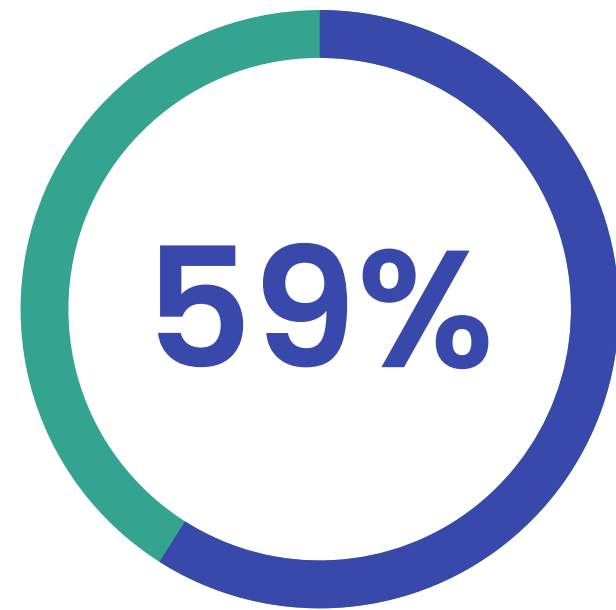
Social media has moved up a spot from 2021 to 2023, while ranking websites have dropped from 5th in 2021 to 7th in 2023

Most useful social media channels for researching study options:

	Instagram	30%
	Facebook	25%
	LinkedIn	18%
	YouTube	8%



Students expect quick responses



expect a response from a university within 24 hours or less

9.5% expect a response immediately

+136%
increase in expecting a response within 24 hours or less from 2021 to 2023

“—
People who are going to apply to your university tomorrow, expect you to reply to them yesterday. Over half of students want a response within 24 hours or less, and that’s just increasing. —”



Dr Mark Bennett, Director of Audience & Insights FindAUniversity, a Keystone company



Poll!

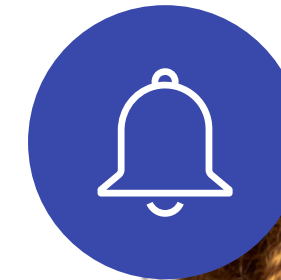
During our live webinar, *the State of Student Recruitment UK & Europe*, we asked higher education attendees:

How quickly does your institution reply to enquiries from prospective students?

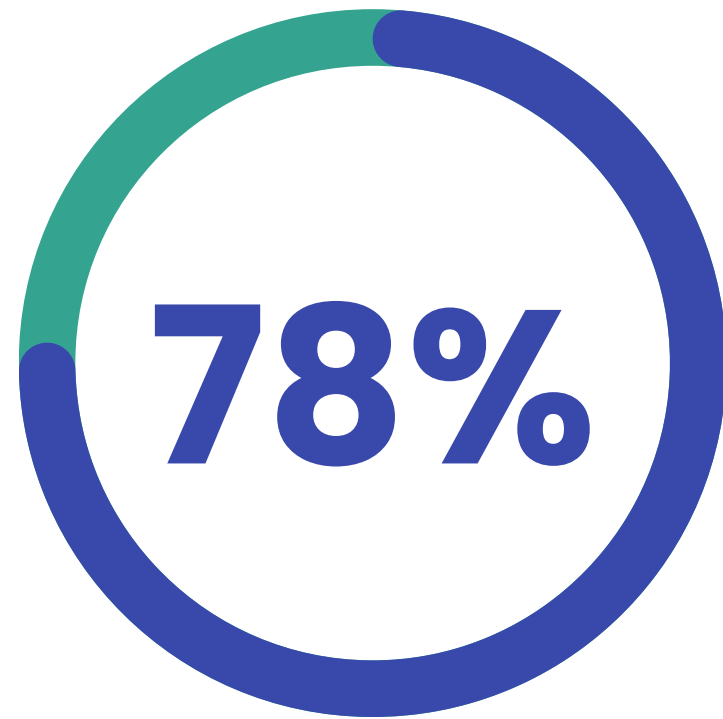
- Within 24 hours 35%
- Within a few hours 11%
- Within 2-3 days 33%
- Within a week 8%
- Longer 1%
- Don't know 12%



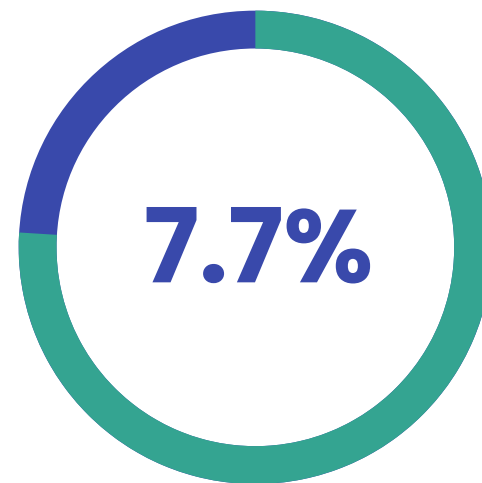
121 responses



Modes of communications



prefer to be contacted by email



want to be contacted on instant messenger i.e. Facebook, WhatsApp



How can a university improve their communications?



25.5%

Quality of response



25.2%

Availability of information

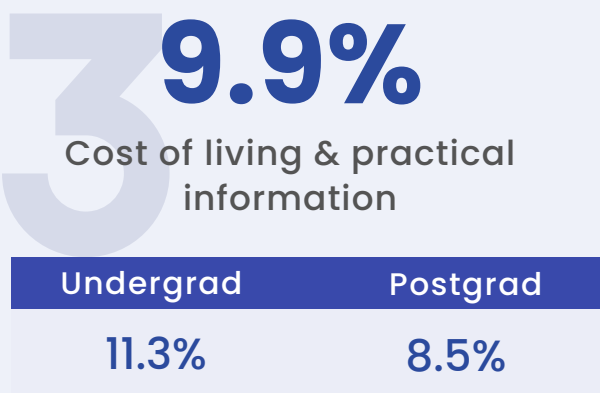
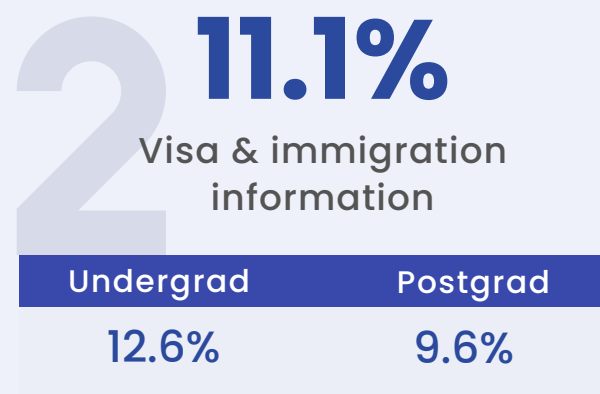
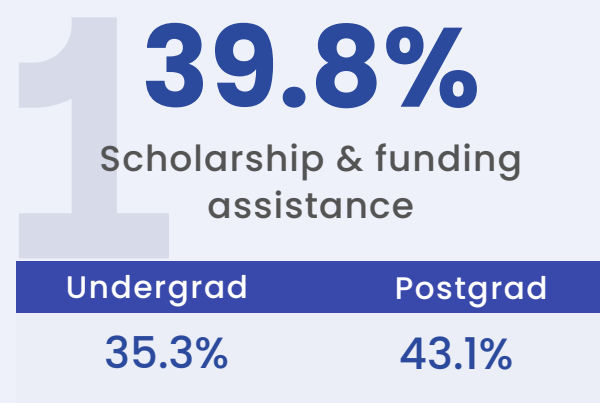


23.2%

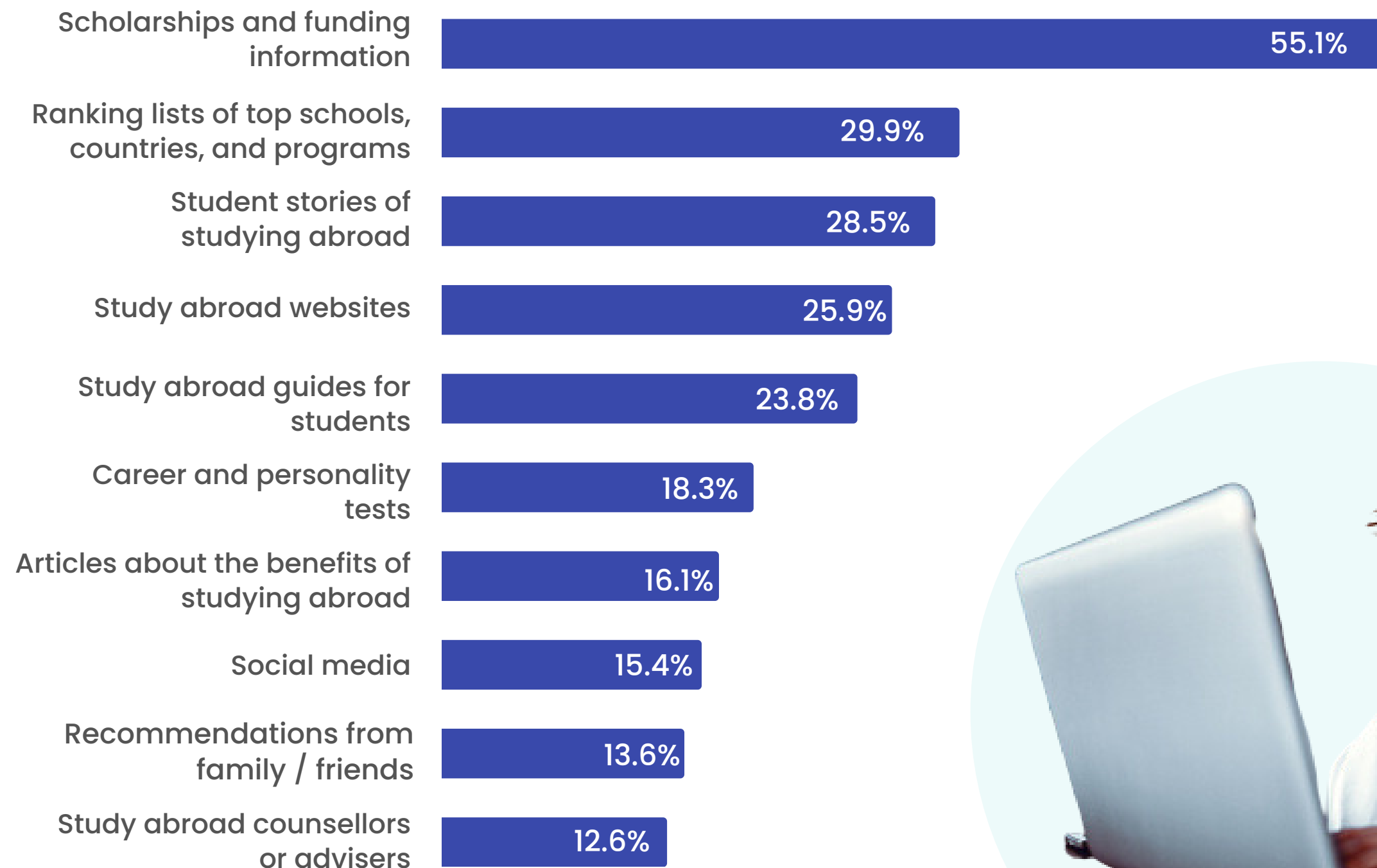
Speed of response

Information preferences

What information are you most interested in receiving?



What do you find most helpful when deciding where to study abroad?

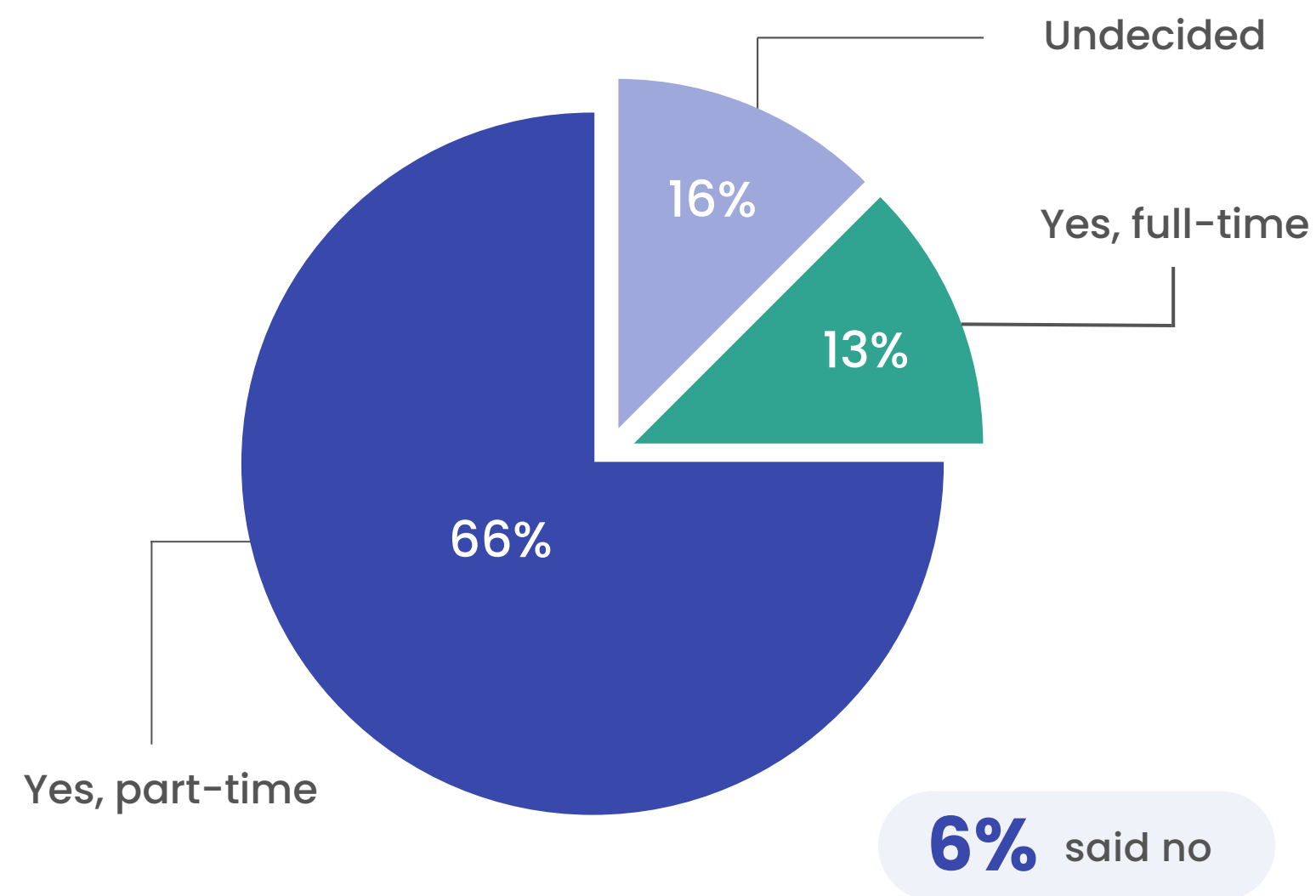




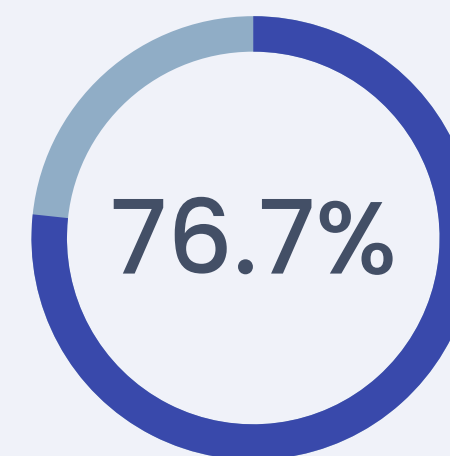
Funding

Working while studying

Will you work or plan to work while studying?



What might stop you applying for a programme?



said 'expensive tuition fees'



What are you most concerned about?



+110%
increase in visa requirements & immigration compared to 2021



35.6% **Top Concern:** Racial discrimination



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5500+ institutions trust Keystone for their student recruitment.

And, we are trusted by over 120 million students every year to help them find the right education.



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