

KICKSTART

YOUR **2025** STUDENT RECRUITMENT



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EDUCATION GROUP

Trump's impact on student decision-making



58%

of **European students** say Trump's election has had a **negative** impact on their desire to study in the USA.

US searches down

Across Keystone sites, the number of students searching for Masters and PhDs in the US dropped by 5% on November 6 vs. October 30.

Searches are down 3% overall.

42% overall less likely to consider US

From a survey of 600 prospective students, 42% said they are less likely to consider studying in the US following Trump's election result.

58% of European students, 21% of Asian students and 29% of African students.

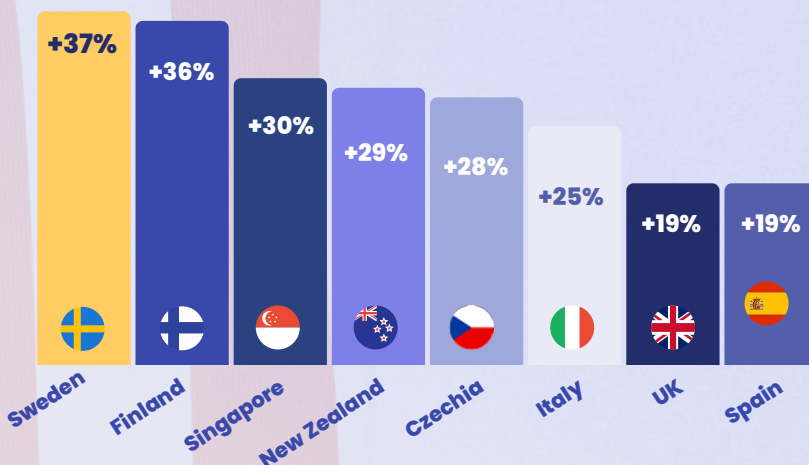
North America students turning elsewhere

There has also been a 17% drop in North American students searching for US programs (October 30 vs. November 6).

American students may now be considering options to study abroad.

Data capture points: October 30 and 6 November 2024

US interest is down... where is student interest shifting?



41%

of students remain 'uncertain' about the impact of Trump's election.

Audiences are still making up their minds, which means universities still have the opportunity to reassure them.

HOW TRUMP'S RE-ELECTION IS SHAPING INTERNATIONAL STUDY TRENDS

The result of the US election is undoubtedly significant and international education will see some of the most immediate impact. However, that impact will be complex as students from around the world ask what a second Trump presidency means for their study plans, and students from within the USA will become more likely to consider studying abroad. Our unique combination of Keystone Pulse survey and Share of Search data can already reveal some of this impact.

Key Findings from the Keystone Pulse Survey

Recent survey results from over **6000 respondents** in October reveal a significant shift in how international students perceive the USA as a study destination. A noteworthy **42% of prospective students** indicated that they are less likely to consider studying in the USA following Trump's re-election. This indicates a rising sense of hesitation among the global student audience. Perhaps more significantly, **41% remain uncertain**. Audiences are still making up their minds about the impact of this news, which means universities still have an opportunity to support and reassure them.

The implications of this sentiment are particularly pronounced among prospective graduate audiences. **5%** of prospective students explicitly stated that they are now less inclined to pursue their studies in the USA.

This statistic underscores a critical trend: the postgraduate demographic appears to be specially alert and sensitive to the political environment, which could impact their decisions about education opportunities.

Variance in Student Search Behavior Post-Election

Our Pulse survey shows how students feel, but Share of Search trends across Keystone platforms immediately reveal how interest in studying in the USA has shifted following the election. By analyzing search data from October 30 (a week before the election) and November 6 (the day after the election), we observe an overall decline of 3% in interest toward American institutions.

Regional Insights:

- East Asia: **-3%**
- South Asia: **+9%**
- Europe (excluding the UK): **-3%**
- North America: **-17%**
- South America: **+1%**
- Africa: **-1%**
- UK: **-1%**

READ ALL OF OUR BLOGS AND TIPS AT:

KEG.COM/NEWS



Particularly noteworthy is North America's drastic **17% decline**—a trend that reflects international perceptions and indicates a significant pivot among American students themselves, who may now be reconsidering their higher education options both domestically and abroad.

This substantial decline raises questions about how domestic sentiments are entwined with global perceptions and could signal broader shifts in student mobility.

Shifting Interests Towards Alternative Study Destinations

The uncertainty surrounding the USA's viability as a study destination has increasingly encouraged prospective students to explore alternative options. The countries that have emerged as beneficiaries of this shifting interest include:

- Sweden: **+37%**
- Finland: **+36%**
- Singapore: **+30%**
- New Zealand: **+29%**
- Czechia: **+28%**
- Italy: **+25%**
- UK: **+19%**
- Spain: **+19%**

These figures paint a picture of students actively seeking study opportunities in nations that are perceived to offer more stable and welcoming educational experiences. This trend suggests that as global uncertainties rise, many prospective students may be inclined to relocate to countries that provide a more favorable political landscape for their academic pursuits.

Adaptation in Higher Education Marketing

In an environment thick with uncertainty, universities must be agile in adapting their marketing strategies to align with potential students' evolving attitudes. Engaging narratives that articulate academic opportunities in a warm, inclusive manner—emphasizing a welcoming and supportive educational environment—will be crucial in restoring prospective students' confidence.

Furthermore, institutions should stay vigilant by actively monitoring new trends and adjusting their outreach strategies accordingly. This could include enhancing international recruitment initiatives or crafting targeted campaigns for specific demographics still interested in studying in the USA.

As we progress, it's essential to appreciate the power of data to inform our strategic choices. Understanding the subtleties in global student sentiment allows universities to tailor their approaches effectively and attract diverse international audiences, paving the way for a successful recruitment strategy in a changing global landscape.

For further insights into student behaviors and tailored strategies that can help bolster your recruitment efforts, let's explore how we can collaborate to enhance your university's appeal and visibility in this evolving context.

About the Author

Dr. Mark Bennett is the Director of Audience and Insight at FindAUniversity, a Keystone Company. Leveraging Keystone's unique data and insights, Mark regularly presents on global higher education trends, recruitment, and policy topics, having previously spoken at events organized by CASE Universities Marketing Forum (UMF), HELOA, NAGAP, ContentEd, the UK Council for Graduate Education (UKCGE), Westminster Forum and others. Mark taught at multiple UK universities prior to joining FindAUniversity and holds a PhD in gothic literature from the University of Sheffield; he still struggles to convince his kids that ghosts aren't real.



2024 Open Doors Report

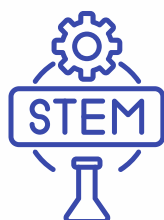
Annual Data Overview



IE's Open Doors 75th annual report today tells an exciting tale of opportunity for the growth of internationalization in the **USA**, discover our quick snapshot:

International students to the US increased by 7%

+8% Graduate, -1% Undergraduate



56%
of international
students in the
US majored in
STEM

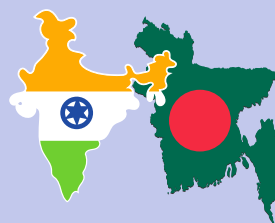


+49%
US students
studying
abroad

Top 5 destination: Italy, UK,
France, Spain, Ireland

**International students
population in the US**

25%
India



27%
China

Big in students coming from
Ghana (+45%) and **Bangladesh (+26%)**



ALL-TIME HIGH!

242,728
students doing OPT



Source of Funding

+54,5%

Personal
& family

+21,8%

Employment

Source information:

The Institute of International Education (IIE) has conducted an annual census of international students at U.S. universities since 1919. Published since 1949 and supported by the U.S. Department of State since 1972, the Open Doors project provides detailed data on student flows into and out of the U.S. Visit them at: <https://opendoorsdata.org/>



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What do you see for international higher education in 2025 and beyond?

Higher Ed Chat podcast: Trends for 2025



KEYSTONE
HIGHER ED CHATS



"I think we'll see the rise of agents, lead scoring and huge investment in digital marketing and Artificial Intelligence in universities. Also, a period of increased enrollment targets, which means a lot of pressure on admissions staff and a return to an ROI model, which could fundamentally change how the staff operates."

Stephanie Woden, Assistant Dean of Enrollment, Marketing & Comms at Josef Korbel School at the University of Denver
Episode 20: The Impact of Trump's Presidency on U.S. Higher Education



"I see more blended learning, combining both physical and online classes. I also see more micro-credentials, with students taking fewer modules at their own pace that would eventually stack up to a degree. Same with short executive courses, where students rapidly upgrade their skills."

Alson Tan, Senior Manager of International Marketing at the National University of Singapore
Episode 21: The Secret Behind the Academic Rise of Singapore



"2024 has been a challenging year for many destinations: political changes, immigration conversations, economic challenges... What that means for 2025 is that we have a lot of pent-up demand that's been created that will be released at some point in the upcoming months. We are starting to see now in the UK that steep increase in inquiries coming through."

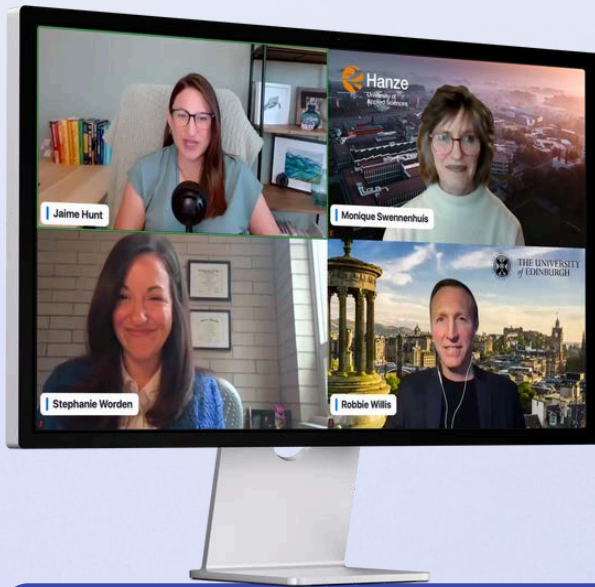


Jenni Parsons, Chief Market and Partnerships Officer at UniQuest
Episode 19: Key findings of the Enquiry Experience Tracker 2024



SCAN
ME!





The Best of our Webinars

Best quotes from 2024

“



We had a TikTok video recently that went viral, with over 2 million views. What's interesting is that 90% of the engagement was from people that were not followers. So, it's important to consider when we are creating videos for TikTok that most people might not be familiar with your university.

Elly White, Social Media & Digital Officer at University of Glasgow
The Dos and Don'ts of Higher Ed Social Media

”

“

There's only 24 hours in a day. And people are getting over a hundred emails in that day. So, there is not a lot of time to dedicate to every single email. People must make decisions. Email content needs to be interesting enough if you want to have people spend minutes reading all your content and deciding they do not have time for all the other emails.

Ashley Budd, Director of Advancement Marketing at Cornell University *Student Email Marketing Best Practices*



”



2024's top 4 webinars

1 The Dos & Don'ts of Higher Ed Social Media (Part 1 & 2)

Learn from a panel of social media experts and get tips & tricks on how you can successfully manage your Higher Ed social media channels.

2 What Do Students Really Want?

Dive into best practices to optimize your video, email and social media content for different stages of the student journey.

3 Student Email Marketing Best Practices

Learn the latest tips & tricks of email marketing for student recruitment.

4 State of Student Recruitment 2024

Dive into data from 27,000+ prospective students representing 195+ countries.

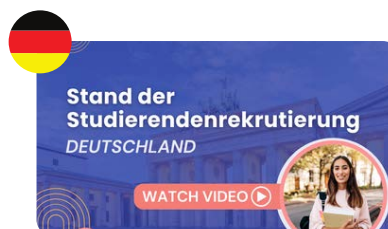
Download the full report!



Geographic Focus Webinars

This year, we hosted regional webinars in **Italian**, **French**, and **German**, offering tailored insights and expert discussions for professionals in each region.

These webinars provide valuable opportunities to stay ahead of trends, expand networks, and gain new skills.



WATCH ALL WEBINARS AT:
[KEG.COM/EVENTS-WEBINARS](https://www.keg.com/events-webinars)

TOP SOCIAL MEDIA TRENDS SHAPING INTERNATIONAL STUDENT RECRUITMENT IN 2025

We have collated some tips and insights from our Higher Ed colleagues, and Keystone webinars, podcasts and blogs to create your 'social media best practices' cheat sheet.

Improve your customer service on social media



Social media is the poorest performing channel for responding to student inquiries. Only 1 in 5 of our mystery shopper students had a positive experience on Instagram or Facebook when they asked universities questions.

Does your social media team have the information to answer questions well? Make sure to have a culture of answering student questions on social media, and if extra training is needed to do so.

Elissa Newell, Edified, publisher of the Student Enquiry Experience Tracker

LinkedIn's future potential



For the last couple of years, we've been having really great expansion on LinkedIn, and we've seen good growth when it comes to our Masters and PhD programs.

Joanna Kumpula, University of Tampere (Finland)



Undergraduate is a different story. But for postgraduate, LinkedIn is an emerging platform. It's really getting its act together in terms of content creation tools. I will say though, it is probably a few years behind the other major platforms.

Kyle Campbell, Founder of Education Marketer (US)

Ads work differently for every demographic



The US market doesn't consume digital and social media ads the same as international markets. If we run an ad in Texas until the money runs out, it will run for weeks. Whereas the same ad in South east Asia will expire in 5 days. All markets act differently.

Sebastian Fuentes, University of Texas, Arlington (US)

Optimize social media for SEO

We do institution-wide training, for our content creators on SEO and keyword research. And that translates right into social media as now social media is turning up in search results. So you need to make sure your university social media profiles are optimized, as well.



Brian Piper, University of Rochester (US)

Use students to create your content

It's an advantage having influencers amongst your student body and graduates. We like, as much as we can, to use them to provide us with content, and sometimes it's paid for, sometimes it's free. We encourage that alongside our press team, our content team, our academics - social media is a shop window for all of us.

Stephanie Limuaco, Royal College of Art (UK)



TikToks can 'go viral' unexpectedly



TikTok is probably the last or only social media channel where someone with no history of posting content, no followers, no audience can publish and then have this incredible hit because the content just hits the right at the right time, they can become viral.

Kyle Campbell, Founder of Education Marketer (UK)

Think about parents on social media too

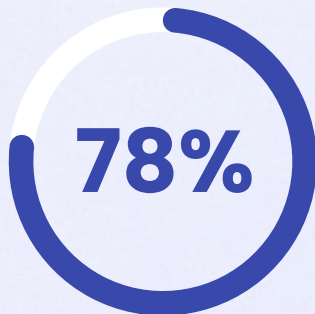
We look at what social platforms have engaging audiences and then think, what is our approach to engage with not just students, but those within the student's network that may influence their decision making, because we know it's more of a 'family unit' decision in a lot of cases versus an individual decision.

Sebastian Fuentes, University of Texas, Arlington (US)



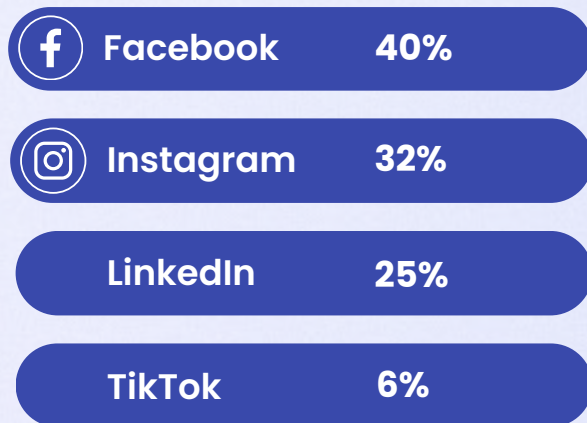
As part of Keystone's annual State of Student Recruitment survey,
we asked 27,500 prospective students in 2024,

"Do you follow a university on social media?"



of prospective
students follow
universities on
social media

WHICH CHANNEL DO THEY FOLLOW



Analysis

We may be quick to write off **Facebook** in 2024, but according to our data, students are still using it. And, if your target market is **Africa**, then Facebook should still play a substantial role in your social media strategy.

Indian students are also using **LinkedIn** to look at universities, while **TikTok** is the most popular with students **from the US, Canada and Europe**.

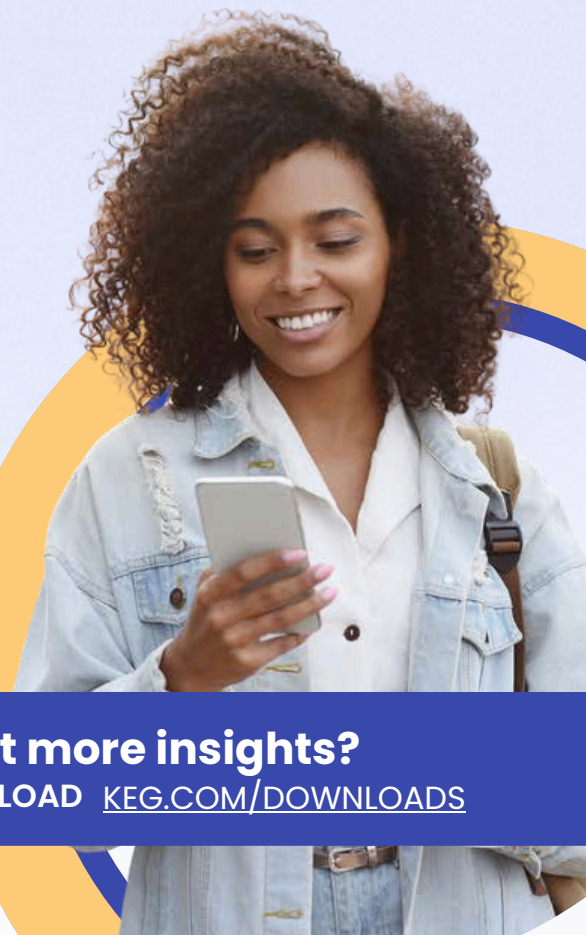
PREFERENCE BASED ON STUDY LEVEL

	Undergrad	Masters	PhD
Facebook	40%	41%	39%
Instagram	39%	31%	27%
LinkedIn	12%	12%	40%
TikTok	9%	5%	4%

PREFERENCE BASED ON NATIONALITY

US & Canada	34%	29%	19%	6%
Europe	39%	23%	23%	5%
The UK	30%	26%	23%	5%
Africa	23%	49%	25%	6%
India	45%	17%	32%	1%*
Asia	36%	38%	26%	2%*

*TikTok banned in India



Email Marketing Strategies

to Elevate Your Recruitment Campaigns

Create emails in the F pattern

When we're presented with text on a white screen, we scan the **top line** and then our eyes **move down** the **left hand side** of the page/screen.



students will skim here
and then here

CTA

Open day in June

Some information in here
and then here.

What students need to bring
with them.

Say goodbye.

SIGN UP TODAY

Add space around CTAs

Check emails with the **'2 second rule'**. Students will read the top line and then scan for a clear CTA. Surround CTAs with white space so students know exactly what to do within 2 seconds.

Avoid gimmicks in subject lines

Get to the point with subject lines. If your email is about an open day, try: **'Campus open day: date'** as the subject. Teasers and marketing taglines may impact open rates.

Is email dead?

The short answer is.. **no!**

70% of students voted email as the top channel they use to communicate with universities.



*Keystone survey of 27,000 students 2024



The Art of Writing Student Emails



3 tips to boost student engagement



Use behavioral data to tailor communication

While you may have a predefined order for sending information to prospective students, it's important to remember that they might not prefer to receive it in that sequence. Instead, use behavioral data—such as the links or buttons students click on your website—to gauge their interests and deliver the most relevant content based on their actions.



Tap into live chat and social media insights for email ideas

If your website features live chat or a chatbot, take note of the most common inquiries and use them to inform your email content. Additionally, keep an eye on social media to identify recurring questions or concerns that can help you craft more targeted and helpful messages.
















Include parent-focused content

In a survey of **2,100** students, **39%** said they were hesitant to study abroad because they didn't want to leave their family and friends. Make sure your communications acknowledge and address parents' concerns, particularly around practical aspects like transport options, campus safety, and key term dates—so families can plan accordingly and feel more comfortable with the decision.

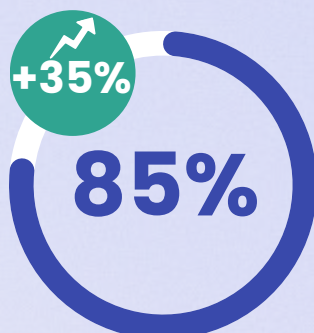
Beyond email...

Understanding Student Communication Styles

COMMUNICATIONS PREFERENCES BASED ON STUDENT NATIONALITY

							
		Email	Instant messaging	Video call	Phone	Live Chat	In-person
	Global	70%	12%	6%	5%	3%	2%
	US & Canada	63%	9%	10%	8%	4%	5%
	Europe	67%	9%	8%	6%	5%	5%
	The UK	65%	7%	6%	8%	6%	6%
	Africa	73%	11%	5%	5%	2%	2%
	India	59%	12%	10%	10%	5%	3%
	Asia	67%	12%	6%	6%	4%	2%

**Keystone survey of 27,000 students 2024*



expect a response from a university within **24 hours or less**

There is a greater expectation on speed of response. **35%** more students expect a response within 24 hours or less compared to 2023. While **55% more students** expect a response **immediately**.



MARK YOUR CALENDAR:

Essential Conferences for
International Recruitment

2025

CCID 2025

Annual Conference

February 14-17, 2025 | Washington, DC

Who should attend: International educators and administrators within community colleges as well as students interested in community colleges.



SXSW EDU

Annual Conference & Expo

March 3-6, 2025 | Austin, Texas

Who should attend: International educators, and professionals administrators as well as industry leaders.



THE PIE LIVE EUROPE

Conference & Exhibition

March 11-12, 2025 | London, England

Who should attend: Higher ed and vocational training educators, student counselling and advising professionals, ed tech providers.



EFMD MBA 2025

Annual Conference

March 19-21, 2025 | Munich, Germany

Who should attend: International educators and administrators, as well as MBA directors and staff.



APAIE 2025

Conference & Exhibition

March 24-28, 2025 | Delhi, India

Who should attend: International educators, policymakers, and higher education officials with an Asian-Pacific target market.



ICAM 2025

Annual Conference

April 7-9, 2025 | Vienna, Austria

Who should attend: Corporate representatives, deans, associate/assistant deans, international directors, program directors, department chairs, and faculty.



NAGAP 2025

Annual Conference & Expo

April 23-26, 2025 | San Francisco, California

Who should attend: International educators and administrators, as well as policy experts.



ICEF Spanish Education

Annual Conference

May 19-21, 2025 | Madrid, Spain

Who should attend: International educators, policymakers, and higher education officials with the Spanish target market.



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2025

Essential Conferences for International Recruitment

NAFSA 2025

Annual Conference & Expo

May 27-30, 2025 | San Diego, California

Who should attend: International educators and administrators, as well as policy experts.



EAIE 2025

Annual Conference

September 9-12, 2025 | Gothenburg, Sweden

Who should attend: International educators and administrators, as well as policy experts.



NACAC 2025

Annual Conference

September 18-20, 2025 | Columbus, Ohio

Who should attend: International educators and administrators, as well as policy experts.



AIEC 2025

Annual Conference

October 14-17, 2025 | Canberra, Australia

Who should attend: International educators and administrators, involved in fostering global educational exchanges.



Stay tuned for upcoming **Keystone-specific events** where you'll have the opportunity to learn directly from the team.

These sessions are designed to provide valuable insights, answer your questions, and give you a deeper understanding of our products and services.

State of Student Recruitment

REGION REPORTS

BONUS



State of Student Recruitment 2024

Data from international students interested in SPAIN

Data & insights from 357 students interested in studying in Spain. Data collected Feb–April 2024.

WHY INTERNATIONAL STUDENTS WANT TO STUDY IN SPAIN

Motivations to study

- 1 Career progression 42%
- 2 Qualify for a specific career 39%
- 3 Qualify for further study 36%
- 4 Interest in the subject 34%
- 5 To have an adventure 30%
- 6 For a challenge 28%
- 7 To better my earnings 25%



ANALYSIS



'Qualifying for a specific career' is more important to students who want to study in Spain with 39%, compared to the global average of 34%, while qualifying for further study was less of a motivating factor for students interested in Spain.

36% said it was a top factor compared to 43% globally.



The individual **teaching staff** are also more of a priority, with 26% of students interested in Spain motivated by it, compared to 17% globally.



Profile and highlight the skill and expertise your teaching staff and faculty bring to your programs in your communications with international students.

We asked students interested in Spain:

What are the most important factors...

...in a school

50% Employment outcomes
48% Reputation & ranking
36% Large international community
33% Campus lifestyle
30% Unique/specialist programmes

...in a program

55% Work placements /internships
48% Affordable fees
45% Opportunities for academic networking
41% Funding opportunities
26% Teaching staff

State of Student Recruitment 2024

Data from international student interested in GERMANY

Data & insights from 1,300 students interested in studying in Germany. Data collected Feb–April 2024.

WHY INTERNATIONAL STUDENTS WANT TO STUDY IN GERMANY

Motivations to study

- 1 Career progression 50%
- 2 Qualify for further study 45%
- 3 Qualify for a specific career 35%
- 4 Interested in my subject 34%
- 5 To have an adventure 26%
- 6 To challenge myself 23%
- 7 Better my earnings 23%



ANALYSIS



Career progression is a bigger motivating factor for students interested in Germany, compared to other countries. It is the top motivating factor for 50%, compared to 45% globally.



The **campus lifestyle** is also more important to students interested in German than other demographics.



Make sure to highlight the typical events international students can expect on campus at your institution in your marketing communications, and pinpoint how your programs will help better their careers opportunities.

We asked students interested in Germany:

What are the most important factors...

...in a school

55%	Employment outcomes
48%	Reputation & ranking
36%	Unique/specialist programs
34%	Campus lifestyle
31%	Accommodation

...in a program

58%	Work placements /internships
51%	Funding opportunities
50%	Affordable fees
46%	Opportunities for academic networking
19%	Teaching staff

State of Student Recruitment 2024

Data from international student interested in ITALY

Data & insights from 1,320 students interested in studying in Italy. Data collected Feb–April 2024.

WHY INTERNATIONAL STUDENTS WANT TO STUDY IN ITALY

Motivations to study

- 1 Qualify for further study 46%
- 2 Career progression 42%
- 3 Qualify for a specific career 35%
- 4 To have an adventure 33%
- 5 Interest in my subject 30%
- 6 To challenge myself 25%
- 7 Better my earnings 19%



ANALYSIS



'Having an adventure' is more important to students interested in studying in Italy, compared to students globally (26%).



In your communications with international students, make sure to include what's on offer outside studying in your area, and how to get the most out of Italy.



The **campus lifestyle** at your university is a top motivating factor for students interested in studying in Italy, compared to global students – ranking 3rd compared to 6th globally.

We asked students interested in Italy:

What are the most important factors...

...in a school

48%
Employment outcomes
43%
Reputation & ranking
38%
Campus lifestyle
33%
Accommodation
33%
Large international student community

...in a program

58%
Work placements / internships
48%
Affordable fees
43%
Funding opportunities
42%
Opportunities for academic networking
18%
Teaching staff

State of Student Recruitment 2024

Data from international students interested in FRANCE



Data & insights from 410 students interested in studying in France. Data collected Feb–April 2024.

WHY INTERNATIONAL STUDENTS WANT TO STUDY IN FRANCE

Motivations to study

- 1 Qualify for further study 41%
- 2 Career progression 41%
- 3 Qualify for a specific career 33%
- 4 Interest in the subject 32%
- 5 To have an adventure 28%
- 6 For a challenge 27%
- 7 To better my earnings 21%



ANALYSIS



Students interested in studying in France are more influenced by the **reputation and ranking** of a university, than students globally.

It is first on the list for France-interest, and second on the list for global students.



Make sure to highlight your universities' credentials in your international student marketing.



The **funding opportunities** available from your university **are also not** as strong an influencing factor, compared to other student demographics. 34% of students interested in France said it was a motivating factor, compared to 49% globally.

We asked students interested in France:

What are the most important factors...

...in a school

52%	Reputation & ranking
51%	Employment outcomes
34%	Large international community
31%	Campus lifestyle
28%	Accommodation

...in a program

54%	Work placements /internships
51%	Affordable fees
44%	Opportunities for academic networking
34%	Funding opportunities
22%	Teaching staff

State of Student Recruitment 2024

Student insights from AFRICA



Data and insights from 8,910 students from Africa. Data collected February–April 2024.

WHY AFRICAN STUDENTS WANT TO STUDY INTERNATIONALLY

Motivations to study

- 1 Qualify for further study 51%
- 2 Career progression 50%
- 3 Qualify for a specific career 32%
- 4 To have an adventure 26%
- 5 Challenge myself 25%
- 6 Interest in the subject 22%
- 7 To better my earnings 19%



The biggest concern for African students is the cost – 73% were concerned about affordability.

ANALYSIS



African students put a greater emphasis on **'qualifying for further study'** – 51% compared to 44% globally.



Funding opportunities are also more important to students from Africa, with **56%** saying it is the most important factor compared to 49% globally.



Globally, we have seen an increase in the importance of **internships** among students. They are up popularity by **46%** since 2023.



When we look at student concerns, students from Africa are **nearly 4x** as **concerned about the political environment** as students from the UK.

We asked African students:

What are the most important factors...

...in a school

54%
Employment outcomes

48%
Reputation & ranking

33%
Unique/specialist programs

31%
Large international student community

30%
Accommodation

...in a program

56%
Funding opportunities

53%
Work placement/
internships

49%
Opportunities for
academic networking

44%
Affordable fees

15%
Ability to study online

Introducing

KEYSTONE AWARDS



We are seeking nominations for outstanding achievements from high-achieving students and professionals to faculties and institutions that inspire others and create a meaningful impact.

To nominate someone, complete an online form and answer questions about your reasons for the nomination and any supporting information.



Nomination entries are free and open now!

Institution categories

- Higher Education Institution of the Year
- Best Higher Ed Marketing Campaign
- Best Student Support Service or Initiative
- Leadership in Diversity, Equity, and Inclusion Award

Student categories

- International Student of the Year
- Student Ambassador of the Year
- Student Athlete of the Year
- Student Organization of the Year

VOTE NOW

Winners will
be announced
Feb. 2025



www.keg.com/keystone-awards



WANT TO BOOST YOUR STUDENT ENROLLMENT IN 2025?

A photograph of a young woman with long dark hair, wearing a light blue sweatshirt, sitting at a wooden desk in a library. She is smiling and looking towards the camera. Behind her are tall wooden bookshelves filled with books. On the desk in front of her is a laptop and some papers. The image is partially covered by a blue banner with white text.

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