

2025



State of Student Recruitment



Recruitment trends in 2025, plus student preferences and barriers to studying abroad

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The State of Student Recruitment in 2025

In today's competitive recruitment landscape, understanding what drives student decisions isn't just helpful—it's imperative. That's why I'm excited to share Keystone Education Group's most extensive student analysis yet, drawing on responses from 42,000 prospective students across 150 countries.

This isn't just another data set - it's a roadmap for universities in an evolving education market.

We've spotted major shifts in what programs students are gravitating to, measured exactly how policy changes redirect student flows, and dug into what motivates students to go to university. We're constantly monitoring these evolving preferences in real-time as the higher education world transforms.

Our **2025 State of Student Recruitment** report reveals what drives student decisions, and how these insights can inform your marketing strategies and make 2025/26 your most successful recruitment year yet.



By Saba Davenport
Chief Marketing Officer
Keystone Education Group

Our most comprehensive analysis yet

Our **2025 State of Student Recruitment** Report provides increasingly crucial insight into prospective students' mindsets. How are students thinking about studying, and how can we help them find their first-choice program?

Our survey data is built upon Keystone's 'always on' Pulse research, which pulls together thousands of responses across different Keystone platforms. This allows us to develop insight at scale - as evidenced by nearly 42,000 responses in this report - but also to segment into specific and specialist audiences: from domestic Bachelors students to international PhD researchers.

Our search trends are derived from Keystone's Share of Search data, which measures how audiences behave on Keystone's platforms: providing accurate analysis of changes in relative interest across subjects and destinations, without being distorted by shifts in our audience.

Through these insights, we gain a better understanding of student behavior. Plus, our year-on-year comparisons can help you understand how behavior is changing and predict what the next 2-3 years might look like. **Let's dive in!**

41,995

Student respondents

Age of respondents

21 and under	44%
22-34	29%
35+	27%

Data collection

1 February - 30 April 2025

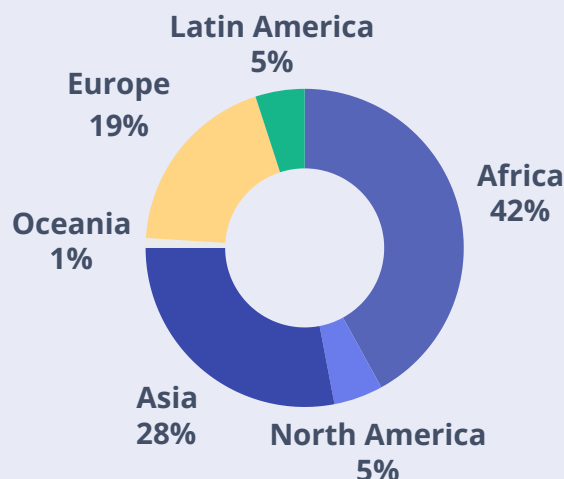


At Keystone, we want to properly reflect student choice and decision-making, leveraging our data at scale and segmenting as accurately as possible. Combining search and survey data in this way gives us a unique perspective on the student journey: revealing what students search for and why they search in that way."

Dr Mark Bennett

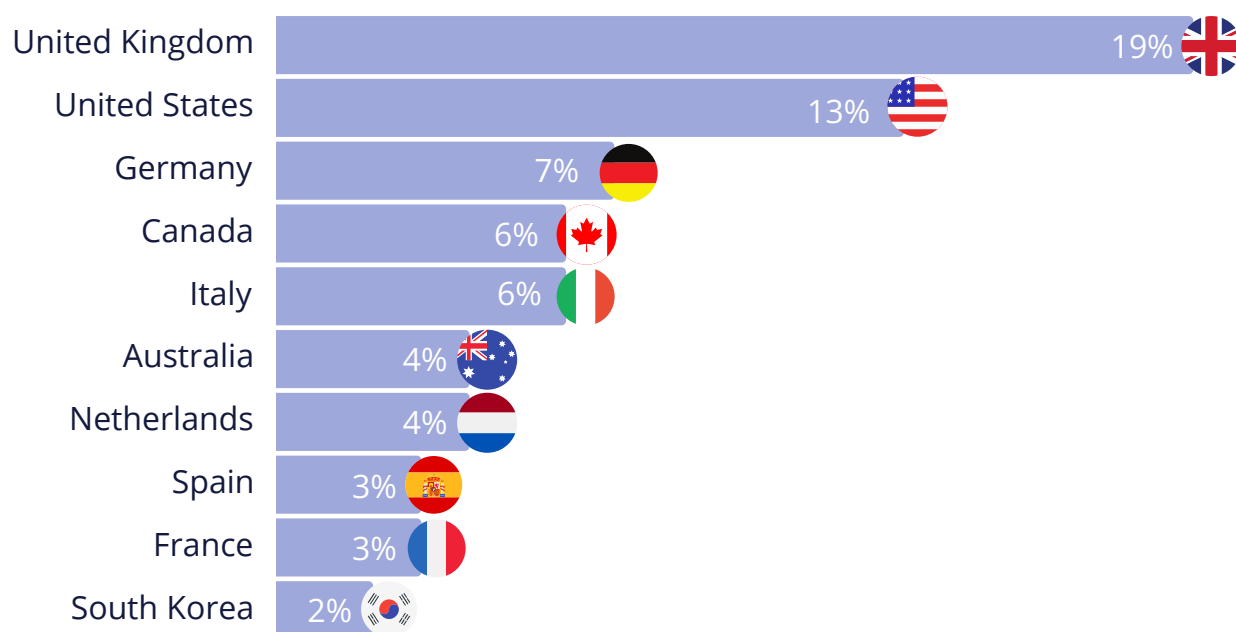
VP of Research & Insight,
Keystone Education Group

150+ represented nationalities



01

Top international study destinations in 2025



Our **State of Student Recruitment** data shows growing diversification in international study destinations. While the UK, US, Australia, and Canada remain popular, they're losing ground to European and Asian countries.

Canada, previously top in 2023, has fallen a place for the second year running - most likely due to the impact of policy changes limiting international student numbers. Meanwhile South Korea has risen in popularity - entering the top 10 for the first time, up from 17th in 2024.

There are opportunities for universities globally to benefit from shifting student flows.



In Keystone's Share of Search data, interest on our websites to European destinations at Master's level **grew by 7%** January-April 2025.

UK policy changes - May 2025

It is positive news for UK institutions - the UK's Share of Search across Keystone's sites has been stable following the white paper publication in May 2025. Further to this, the majority of student responses to our surveying say the proposals do not significantly impact their study plans.

US maintains top spot at Bachelor's level

Bachelor's students

2023

	United States	20%
	Canada	16%
	United Kingdom	12%
	Germany	6%
	Italy	5%
	Australia	4%
	Netherlands	3%
	France	3%
	Spain	3%
	Finland	2%

2024

	United States	15%
	United Kingdom	11%
	Canada	9%
	Germany	7%
	Italy	4%
	Australia	4%
	Netherlands	3%
	Japan	2%
	France	2%
	Spain	2%

2025

	United States	13%
	United Kingdom	13%
	Canada	7%
	Germany	6%
	Italy	6%
	Australia	4%
	Netherlands	4%
	Spain	3%
	South Korea	3%
	France	2%

The US has maintained the top position in our survey for 2025, but its percentage of the total has been decreasing each year—partly due to the diversification of global interest.

Italy and Spain also saw a slight popularity increase this year. And, after making gains at the undergraduate level in 2024, Japan has dropped out of the top 10 study destinations. In its place, South Korea has risen in popularity.



“Although the current climate in the US may feel uncertain, the demand for education remains strong—and that’s not likely to change. The US continues to offer world-class academic opportunities, and is still a hugely popular destination, with over four million searches across Keystone’s student sites in April 2025 alone.”

Dr Mark Bennett
VP of Research & Insight - Keystone Education Group

Popularity boost for the UK with Master's students

The UK has solidified its status as the most popular study destination for Master's level programs, growing by a third since 2023.

2025 began as a period of relative calm for UK international student policy amidst substantial change elsewhere. Indeed, search interest for the UK was up 50% at the Master's level in April 2025. The impact of May's UK immigration white paper remains to be seen, but the UK was in a strong position.

This highlights how a stable international recruitment policy can have an impact on student decision-making.

Master's students

2023

	United Kingdom	18%
	Canada	15%
	United States	14%
	Germany	7%
	France	3%
	Netherlands	3%
	Norway	3%
	Spain	2%
	Finland	2%
	Switzerland	2%

2024

	United Kingdom	20%
	United States	14%
	Canada	9%
	Germany	7%
	Italy	5%
	Australia	4%
	Netherlands	3%
	Luxembourg	3%
	Spain	2%
	France	2%

2025

	United Kingdom	24%
	United States	12%
	Germany	7%
	Italy	6%
	Canada	6%
	Netherlands	4%
	Australia	3%
	Spain	3%
	France	3%
	Luxembourg	2%

PhD students

2025

	United Kingdom	33%		Australia	8%		Italy	3%		Switzerland	2%
	United States	14%		Canada	5%		France	2%			
	Germany	8%		Netherlands	3%		Ireland	2%			

Canada the 'most welcoming' destination of the big four

Despite dropping to fourth in the top destinations list in 2025, Canada is still seen as the "most welcoming" out of the big four. This shows its positive reputation outweighs recent policy changes. So much so, that our data shows caps in Canada and Australia have impacted student perceptions far less than the US funding cuts announced in early 2025.

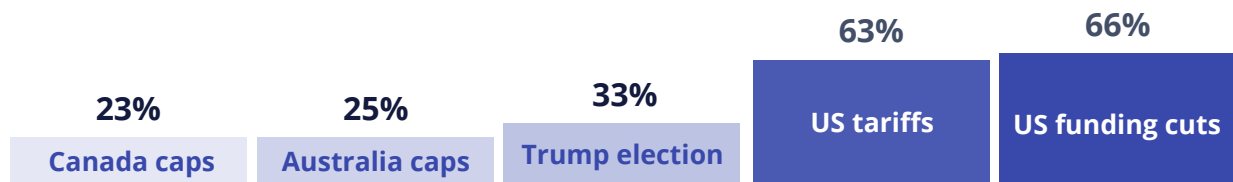
One theory is 'a cap' might make places to study abroad more competitive, but funding cuts or tariffs can create fundamental supply and demand barriers to affordability.

% of students who thought the below countries were 'very welcoming' to international students



We asked: How welcoming do you think the following countries are to international students?

% of students who said the below policy/events impacted them negatively



We asked: Have policy changes *negatively* impacted your desire to study in the US, Canada or Australia?



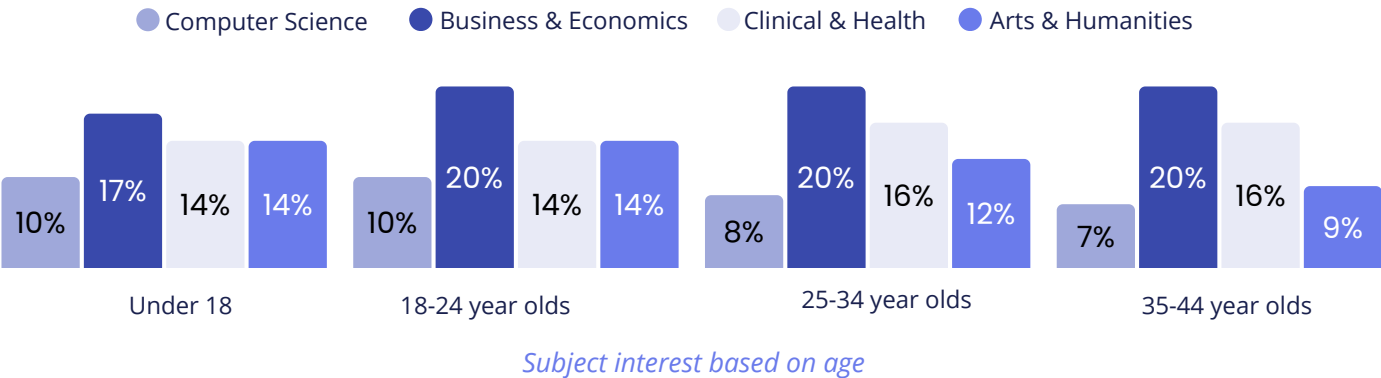
Business & Economics tops international interest

Top subject choices	Bachelors		Master's	
	2024	2025	2024	2025
Business & Economics	18%	19%	20%	20%
Arts & Humanities	14%	15%	10%	12%
Clinical & Health	13%	14%	13%	14%
Engineering	13%	13%	13%	12%
Computer Science	12%	11%	8%	7%
Education	6%	6%	7%	7%
Law	5%	5%	4%	4%
Life Sciences	5%	5%	7%	7%
Social Sciences	5%	5%	9%	9%
Psychology	5%	5%	5%	5%

Arts & Humanities most popular with under 18s

When we split subject interest by study level and age, we are seeing that Bachelors respondents are more interested in Computer Science, which is likely due to a growth in interest in technical skills at this level. We often think of 'reskilling' for older learners, but shifts towards 'keyskilling' for undergraduates could be just as important now.

Arts & Humanities is at its most popular with younger students, so while AI and technical programs are hugely popular, it's important to remember it's not only technical skills that matter.





02

Flexibility

How do you prefer to study?

On-campus study remains the overwhelming first choice for students; however, there has been a slight shift to studying *online* in 2025. The main exceptions are students from South America and Asia, who are showing an even greater interest in on-campus study.

Domestic students favor part time study

56%

of domestic students want to study part-time

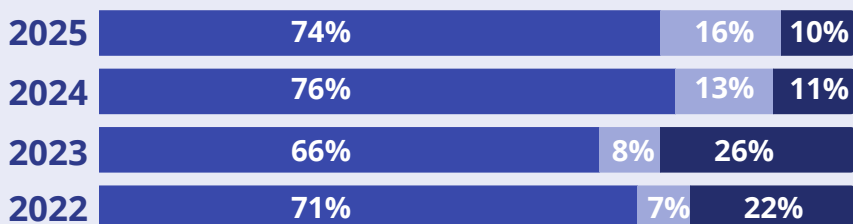
compared to

31%

of international students who want to study part-time

How would you prefer to study?

● Campus/In person ● Online ● Hybrid/Mixed



03

Student motivations

Students are motivated to go into higher education to develop their skills and to qualify for a specific career they have in mind - regardless of international or domestic study.

The importance of career progression becomes greater as we rise through the study levels - 23% of Bachelor students said it was their top motivator compared to 44% at PhD level.

Top reasons students want to study internationally

1	To develop useful skills
2	To qualify for a specific career
3	To qualify for further study
4	To progress in my current career
5	To have an adventure
6	To challenge myself
7	I'm interested in the subject
8	To improve my earnings
9	Prefer to work over study



Domestic student preferences

Unsurprisingly, studying to 'have an adventure' is a higher priority for international compared to domestic students (it is the 8th most motivating factor).

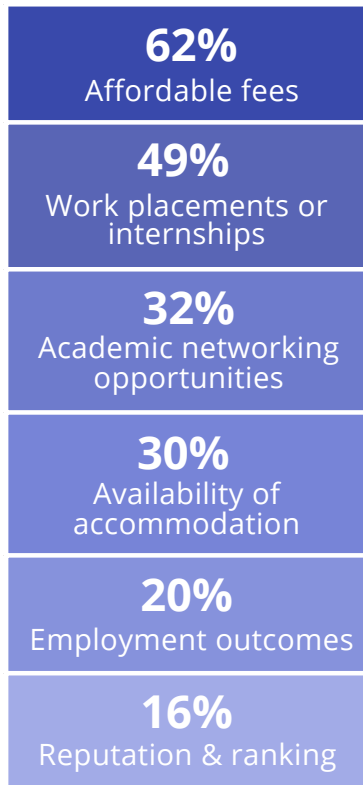
Domestic students are also less concerned about qualifying for further study, but place greater importance on studying to challenge themselves.



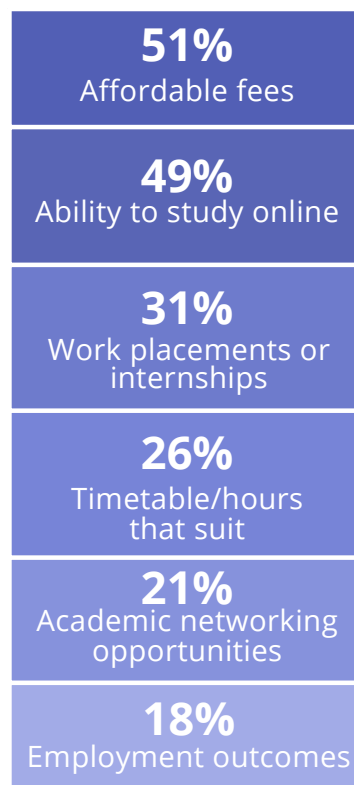
Affordability key to program selection

We asked: What are the most important factors in a program?

... for international students



... for domestic students



Academic networking opportunities

Academic networking opportunities become more popular as we go through the study ranks - it is the most important factor for 28% of Bachelors students, rising to 35% for Master's, and peaking at 38% for PhD students.

Flexibility

This year's results show flexible study is ranked most important for Bachelor students - with 14% saying it was the most important factor in a program. This could be due to more undergraduate students wanting to work part time while studying - we have seen this increase in importance as a funding source in 2025 (section 8 of the report).

Sports and athletics programs

While it isn't in the top six important factors for decision-making, sports and athletics programs are twice as important for students interested in Bachelor study compared to postgraduate.



It's important to appreciate how varied the motivations for different types of study can be, but also to recognise the consistent trends we're seeing. We would expect the opportunity to have an adventure to be a bigger draw for international students, for example.

"We might be more surprised to see that internships and employability are now more important than rankings for both sets of students, as audiences become more focused on value and outcomes."

Dr Mark Bennett VP of Research & Insight

'Cost' the main barrier to studying abroad

We asked students what motivates them to study in their home country instead of studying abroad to gain an indication into their decision to study closer to home. The top reasons to study domestically:

1	Studying abroad is too expensive	56%	5	Don't feel eligible (language)	13%
2	Don't want to leave family and friends	33%	6	Don't see the benefit	12%
3	Studying abroad is too complex	19%	7	Don't feel eligible (academic)	12%
4	Wouldn't feel safe abroad	13%	8	Don't know anyone else doing it	10%

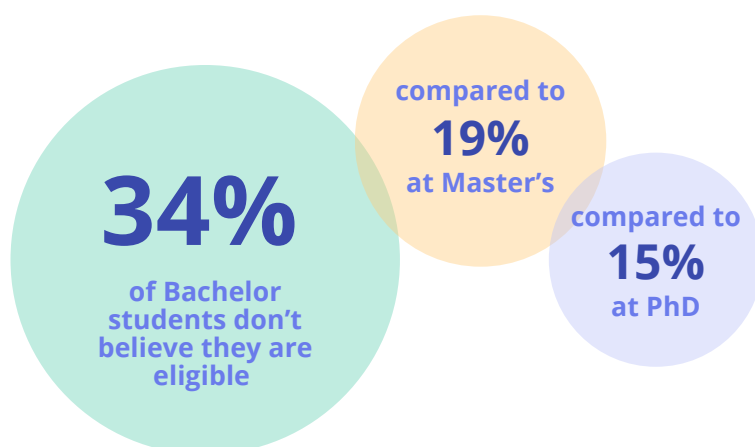
PhD students 'don't want to leave family and friends'

Many students don't want to leave family and friends. This is a big factor at Doctorate level (where students are committing to an extended period abroad), but it's also a blocker for over a quarter of Bachelors and a third of Master's students.

Concerns like this will become more important as countries such as the UK, Canada and Finland have tightened rules on student dependents. Whilst institutions can't change visa policy, ensuring the rules and requirements are signposted - particularly in countries where the rules haven't been as widely advertised - will help international candidates weigh up their options.

Eligibility a concern for Bachelors

More students at Bachelors level believe they aren't eligible for international study (either academically or due to language barriers), considerably more than other study levels:



Safety is also a barrier at Bachelor level - **16%** of Bachelors students said it was a barrier to study internationally compared to 10% at Master's and 8% at Doctorate.

Students consider the program before the school

We asked : Which do you consider first?

Program

45%

School

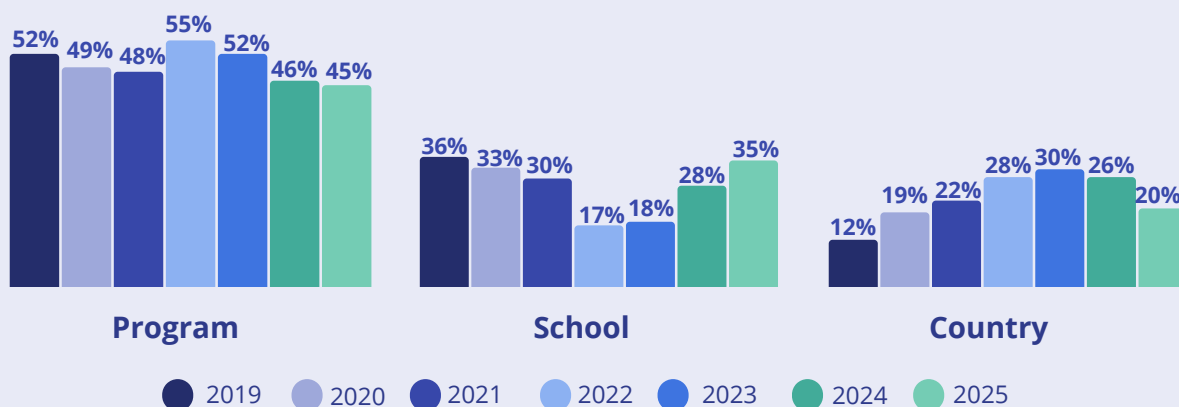
35%

Country

20%

The program had been maintaining its importance as the top consideration for students up until 2023. We put this down to students being more focused on the practical and individual skills they can get from programs. However, in 2024 and 2025, we have seen a slight dip in its influence. In turn, **the school** gained some 'lost ground' from 2019, and has nearly doubled in importance from 2023 to 2025.

Changing consideration over time for international students:



PhD students

The specific program is at its most important for PhD students, with 53% of students saying they consider it first compared to 40% at Bachelors level, and 50% at Master's.

It has also increased in importance since 2024, with 53% of PhD students saying they consider the program first in 2025, compared to 48% last year. PhD students are more focused on the individual program and the benefits they get from it. If you are recruiting for PhD students, program-first marketing should form part of your marketing plan.

Bachelor students

The opposite can be said about Bachelor students - they are showing increased consideration to the school, with 40% saying it is their first consideration in 2025, compared to 34% in 2024.

Domestic students

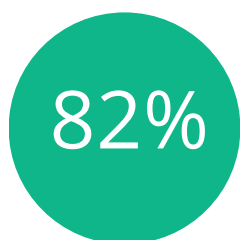
Students studying in their home countries tend to focus on the content of their program first and the school second, and only 8% say the city they will study in is a critical factor. This highlights the more subtle moves among domestic students and that many will stay near home.

04

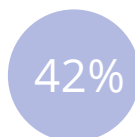
Influences

The power of student reviews

As peer-to-peer communications become more and more popular, we asked students if they take student reviews into consideration in their decision-making, with **82% of international** students saying they did.



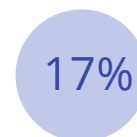
said they take reviews into consideration



said they take reviews into consideration 'a little'.



said they take reviews into consideration 'a lot'.



said no, they didn't take reviews into consideration.

Reviews matter most for older students

Reviews also matter more the older the student is. 43% of 25 to 34 year olds said they took reviews into consideration 'a lot', compared to 38% of those under 24-years-old.

For domestic students, reviews are also hugely influential, with **78% of domestic** students taking reviews into account.



Dealing with negative reviews:



Dr Jordi Robert-Ribes,
Founder, Eduopinions



If you get a negative review, deleting it is the wrong response. You should want a negative review every now and again - you don't want only five stars. Generation Alpha, Gen Z, and even millennials, don't trust when it is only five star reviews and Gen Alpha want trust. Instead of deleting it, draft a great reply highlighting the good parts from the review.

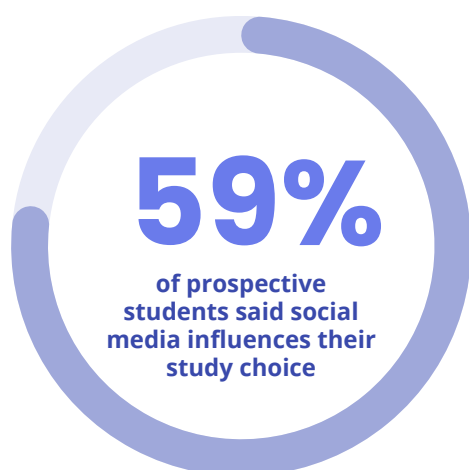
"Students trust their peers, and their peers' experiences, more than what marketing and communications teams are saying."

Top factors influencing study abroad country

	2025	2024
Subjects & study opportunities	55%	47%
University fees & living costs	46%	30%
Post-study work opportunities	41%	36%
Reputation & university rankings	36%	37%
Culture & leisure opportunities	30%	32%

Students prioritize what their course will involve, with subject opportunities growing in importance in 2025. Meanwhile, the importance of reputation and ranking has seen a slight decline.

Social media influences nearly 60% of students' study decisions



While LinkedIn may not be the top priority in your social media strategy, it does have an influence in study choice - especially at PhD.

At Bachelors level, YouTube is the most influential channel, with Instagram a close second.

	YouTube	Instagram	Facebook	LinkedIn	TikTok
Bachelor	27%	27%	17%	14%	15%
Master	24%	18%	17%	32%	9%
PhD	18%	9%	14%	55%	4%

We asked:

Which channel has the most influence on your study decision?

26% LinkedIn

25% YouTube

21% Instagram

17% Facebook

11% TikTok

Saba Davenport
Chief Marketing Officer



"TikTok's billion monthly users make it crucial for brand awareness for institutions. Authentic content matters —82% of students say reviews impact their decisions, so giving control to your current students and letting them share real experiences can sway prospects in your favor."

05

Top skills

Soft skills more valued than technical



We asked: What transferrable skills are you hoping to gain from your study?

- 1 Problem solving (coming up with practical and effective solutions to challenges) - **49%.**
- 2 Critical thinking (forming and evaluating judgements based on facts and analysis) - **45%.**
- 3 Teamwork and networking (maintaining effective working relationships) - **43%.**
- 4 Research (collecting and evaluating data, surveying, academic research etc) - **42%.**
- 5 Management (leading and organising people and teams) - **33%.**

Soft and transferrable skills in problem solving, critical thinking and collaboration are the most important skills to students. These trump AI prompt engineering (13th), coding (14th) and web design (15th).

Academic study preferred to vocational

For the first time, we asked students if they had considered vocational study over academic programs, with 60% saying they wouldn't.

We were interested to explore if rising tuition costs were pushing students toward the likes of apprenticeships, but our data shows students still prefer academic paths.

Top reasons students choose academic over vocational study:

- 1 **Academic university leads to better job prospects**
- 2 **Academic university gives me better study conditions**
- 3 **It is perceived to be higher quality**

Our data suggests students are gravitating toward academic pathways not simply for prestige, but because these programs develop the soft skills essential to progress in their careers. While vocational training may offer immediate employment opportunities, 40% of students who completed our survey believe the 'better' job opportunities will come from studying at an academic institution.

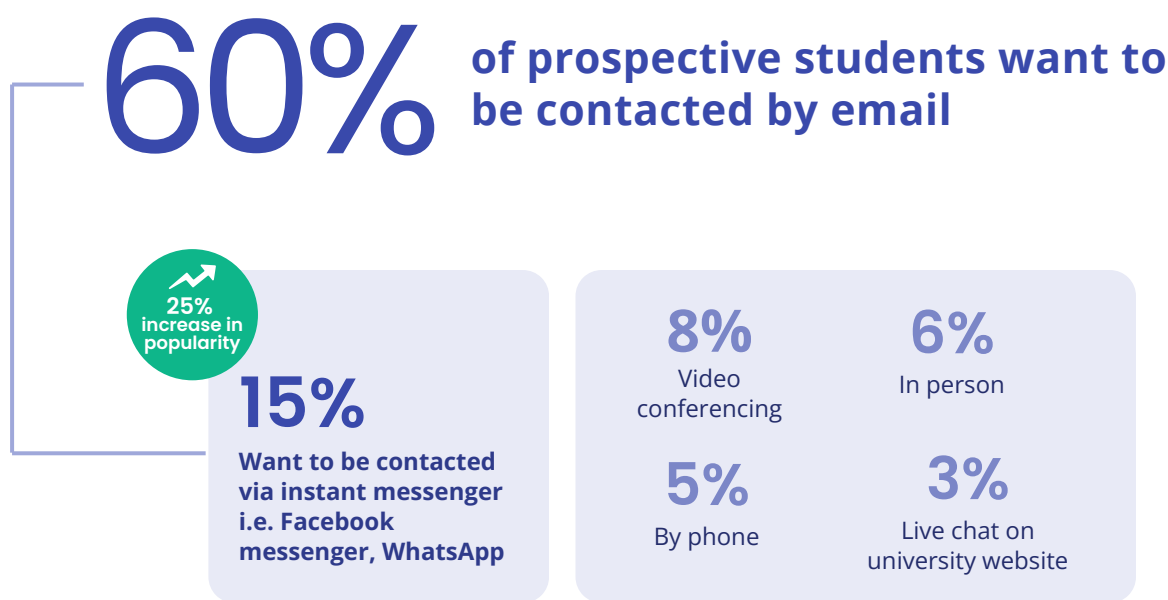
Dr Mark Bennett VP of Research & Insight



06

Communications

Top student communication channels



Email is still the most popular channel by a long shot, however it has decreased in popularity since 2024 by 14%.

In-person communication has increased the most in its place (by 200%). Instant messaging has also gone up in popularity, particularly with Asian (18%) and South American (19%) students.



Dr Mark Bennett
VP of Research & Insight

Students are using a wider range of channels to communicate with universities and increasingly value direct contact in an era of potential AI automation. Email is a much less dominant channel, whilst direct messaging, video conferencing and in-person meetings are all becoming more important as students are drawn to human connection.

Searching for programs

We asked:

Where do you find information about study opportunities?

29%

Browsing university websites

28%

Online search & comparison sites (e.g. Keystone sites)

12%

Contacting universities directly

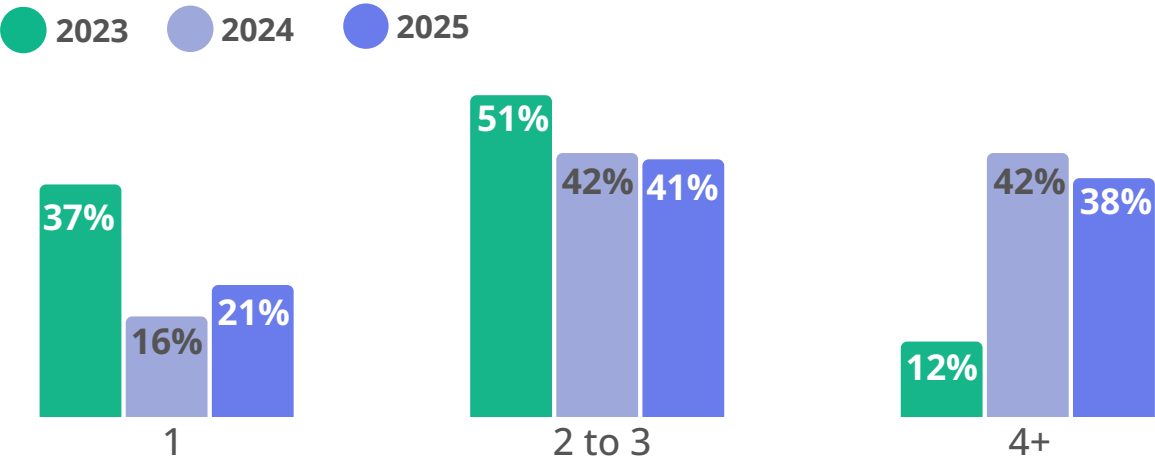
07

Application stage

Around two thirds of students will apply to 3+ universities, with international students tending to cast the net wider.

There is potentially a trend of students turning back towards a more targeted approach to applications, with the number of students submitting only 1 application increasing by 31%.

How many applications have you submitted or plan to submit:



When we look at students from specific regions, students from **Asia** are more likely to submit 5+ applications, while students from Nigeria are one of the most targeted demographics, with 30% submitting only 1 application.

PhD students are the most likely to apply to a wider range of universities with 46% applying to 5+, compared to 27% of Master’s students and 29% of Bachelors.

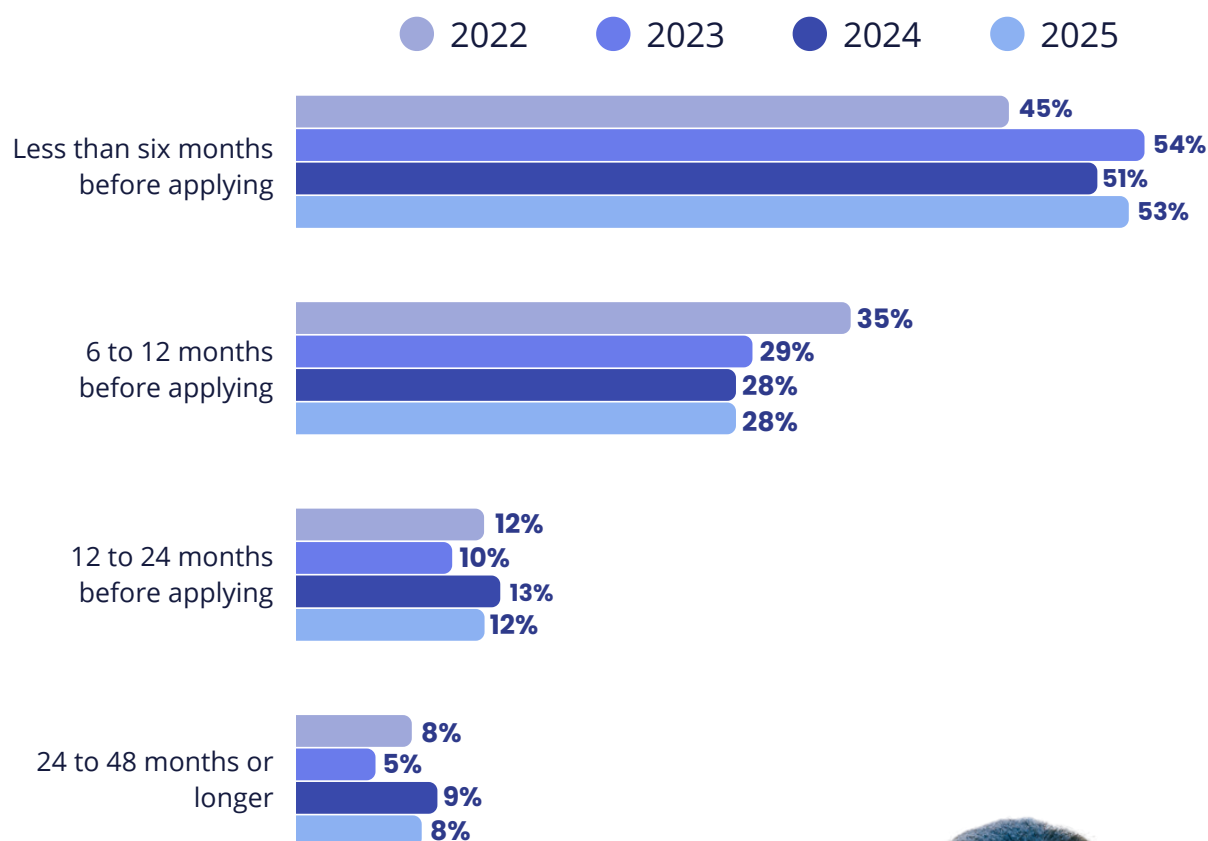
How many applications students are submitting from:

	Europe	Africa	Asia	North America	South America
1	20%	21%	20%	23%	21%
2-3	41%	45%	36%	38%	41%
4+	39%	34%	45%	39%	37%

**sample size from Oceania considerably smaller so not included*

Over half of students take less than 6 months to research study options

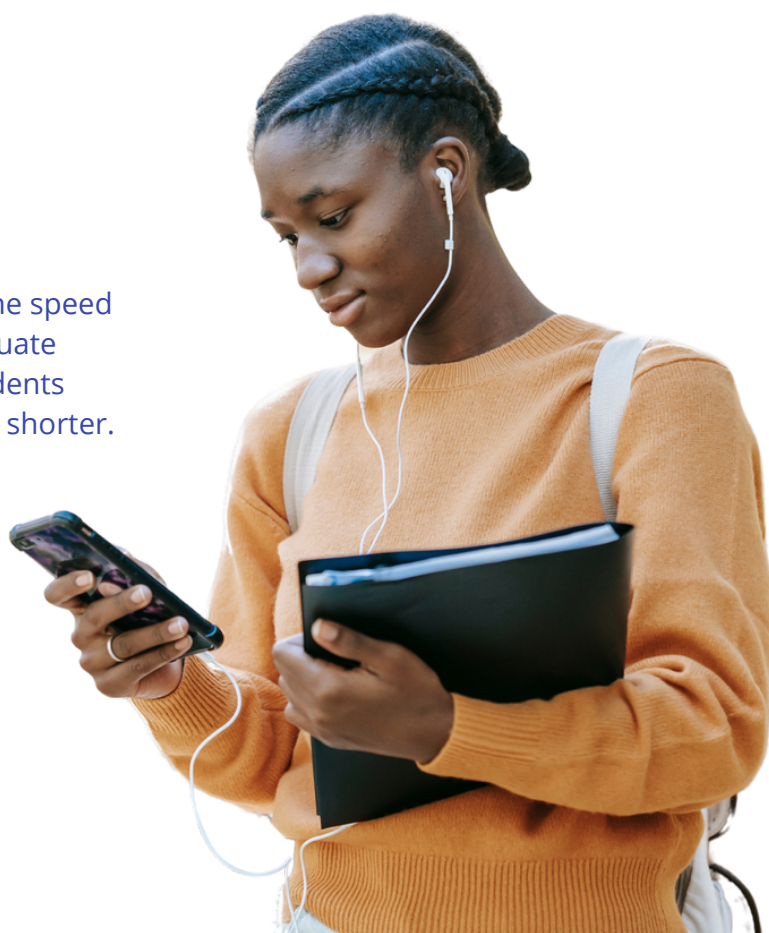
We asked: How long will you take or did you take researching study options before applying?



Accessibility of information

Thanks to the accessibility of information and the speed at which students can discover, collate and evaluate information, it is unsurprising that the time students spend researching their study options is getting shorter.

When we break down the data by study level, it is even across the board. Previously we had seen trends with Doctoral students taking slightly longer to consider their options, however this year they have sped up and are on par with Master's and Bachelor.



08

Funding & obstacles

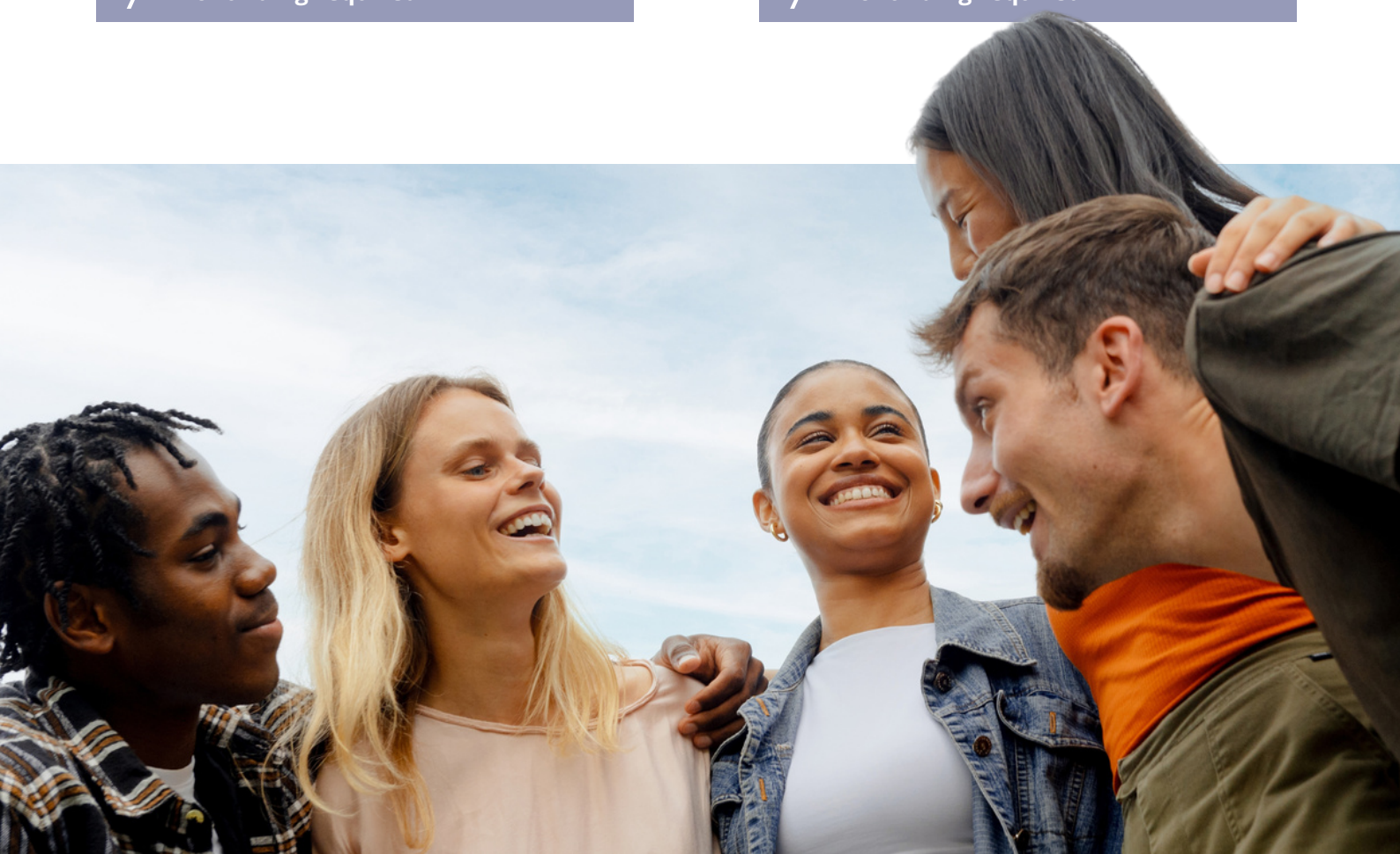
Working while studying is becoming a key way for students to fund their studies. It has risen from 2nd in 2024 to 1st in 2025 for domestic students, and risen to 2nd for international students. This reiterates the need for flexibility to allow students to work alongside studying to fund their education.

How international students will fund their studies

1	University scholarship or bursary
2	Working during study
3	Government funding (incl. loans)
4	Savings/family support
5	Charitable grants
6	Employer contribution
7	No funding required

How domestic students will fund their studies

1	Working during study
2	University scholarship or bursary
3	Government funding (incl. loans)
4	Savings/family support
5	Charitable grants
6	Employer contribution
7	No funding required



Unclear information on website biggest 'barrier' to applying

We asked: What would stop students from applying to an institution?



The good news for universities is that 'unclear or missing information' is the biggest barrier or obstacle for students applying to your institution. That is an easy fix for institutions by regularly updating website information.

When it comes to responsiveness, time is of the essence. 20% of students said institutions taking too long to reply would impact their decision to apply.

In our 2024 report, our data showed that 85% of students expected a response in 24 hours or less. And with instant messaging becoming more and more popular as a communications channel, there is an increased necessity to reply to student enquiries as quickly as possible.



What are your main concerns about study?

- 1 **Cost**
Cost has increased as concern by 12% from 2024. This unsurprising given the cost of living rising globally.
- 2 **Eligibility**
- 3 **Political uncertainty**
Political uncertainty has also increased substantially (by 39%).



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