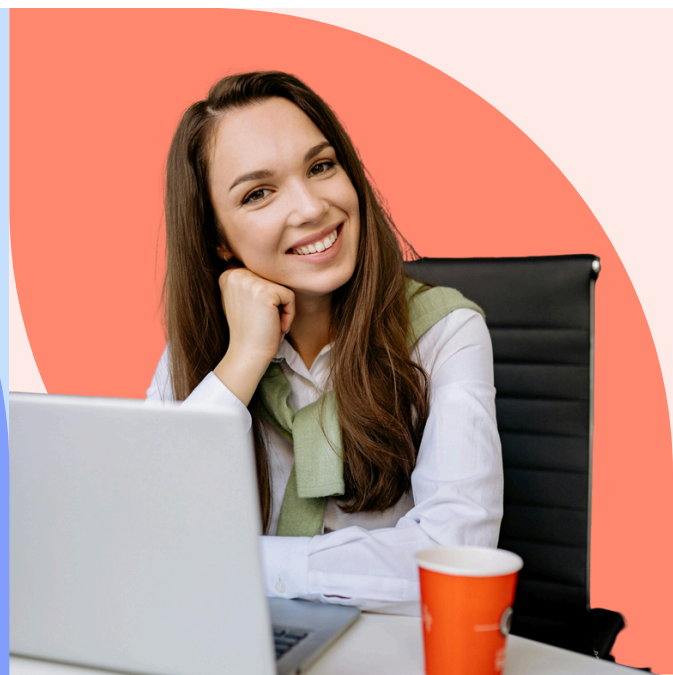




GLOBAL REPORT

The State of Student Recruitment 2026



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The State of Student Recruitment in 2026

If there's one thing the last twelve months have taught us, it's that student recruitment doesn't stand still. Policy shifts, geopolitical tension, and the rapid rise of AI have all changed how students think about studying abroad, and how they choose where to go.

That's what makes this year's report such an interesting read. We've heard from over **67,000 prospective students across 150 countries**, and what they're telling us is that the old playbook needs rewriting.

The Big 4 destinations are facing real competition. Students are increasingly looking toward destinations in Europe and Asia, with a focus on the value the degree will bring them rather than traditional factors such as reputation. They're now using AI to research their options, but still turning to university websites and people they trust when it's time to decide.

Our 2025 State of Student Recruitment report was downloaded by 1,200 professionals from across the sector and is still being downloaded in 2026. We hope this year's report offers even more valuable insight and helps you refine your recruitment strategies for the years ahead.

Whether you're rethinking your marketing and recruitment mix, refining your messaging, or just trying to make sense of where the market is heading, our aim at Keystone is the same as always: to help you have your strongest recruitment year yet.



By Saba Davenport

Chief Marketing Officer

Keystone Education Group



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Our data

Understanding why students choose to study —and where— has never been more important. To help make sense of this, Keystone Education Group has analyzed and dissected survey responses from over 67,000 prospective students across 150 countries.

This isn't just a collection of numbers. It offers a clear picture of how student choices are changing, and what universities need to pay attention to.

The findings highlight noticeable shifts in the destinations students are considering, show how policy changes influence that process, and identify other key factors that make a difference in the prospective student journey: from the tools audiences use and their expectations of them, to the connections and content they're actually seeking.

This report brings our key findings together in a practical way, helping universities understand - and plan - for the State of Student Recruitment in 2026,

Our data sources:

01 Pulse Survey Data

Our unique tracker survey polls Keystone's audiences, revealing cycle-on-cycle insight:

- Trends stretching back to 2021
- Measuring sentiment, intention, impact

Data is drawn from an opt-in survey running across the core Keystone Search and Discovery platforms.



This report captures the state of student recruitment at the current moment. But the data it draws on is far more than a simple snapshot survey.

Our combination of search and survey data allows us to understand what student behaviour looks like *and* what's driving it. What audiences do and what they say. What they look for and why they look for it. And because our audience research is embedded within our platforms, both of our data sources are 'always on': tracking real trends and sense-checking data over time.

I hope you find these highlights useful - myself and my team would love to chat about the questions they inspire and share more of what we're seeing.

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

KEY TAKEAWAYS

What's changed for students in 2026?

AT A GLANCE

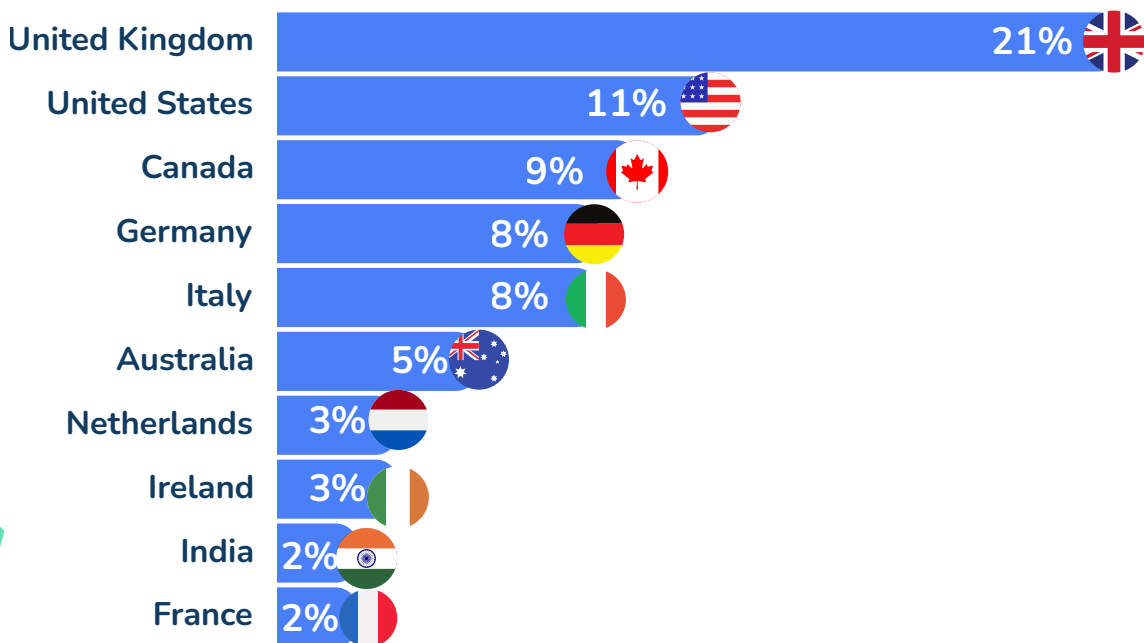
Shifting study destinations	Asian and European destinations challenge the Big 4 on appeal, and win on practical factors.
Return on investment	Audiences are increasingly thinking about long-term value, prioritising practical outcomes over prestige
Authenticity over automation	Students use AI search frequently, but they trust curated resources and human connection for key decisions
Skills for the long-term	Students don't need a degree to learn AI tools. They seek skills and experiences to make those tools valuable.



Student mobility



Most popular destinations in 2026



While the **USA** was our **most-searched** destination (**19%**), fewer students in our survey are selecting it as their **intended** study destination, a trend that has persisted for the second year running. The UK is the main beneficiary of this shift, with high intent from our audiences despite increasing visa obstacles.

Canada and **Australia** have both recovered slightly this year after a downturn in 2025 due to policy instability, and they now take up third and sixth place respectively.

Diversification of student interest isn't slowing down: it's accelerating.

There's been a big shift when it comes to growth in interest beyond the Big 4. More students are gravitating towards Europe overall, as **Italy** and **Ireland** have also increased their share in our survey. Combined, the **European** countries in this 'top 10' now account for 45% of total international student interest - up from 41% last year. Meanwhile, as clear evidence of Asian students increasingly looking for regional study options, student interest in **India** has doubled this year, placing the country on our top 10 for the first time.

What's making students move?

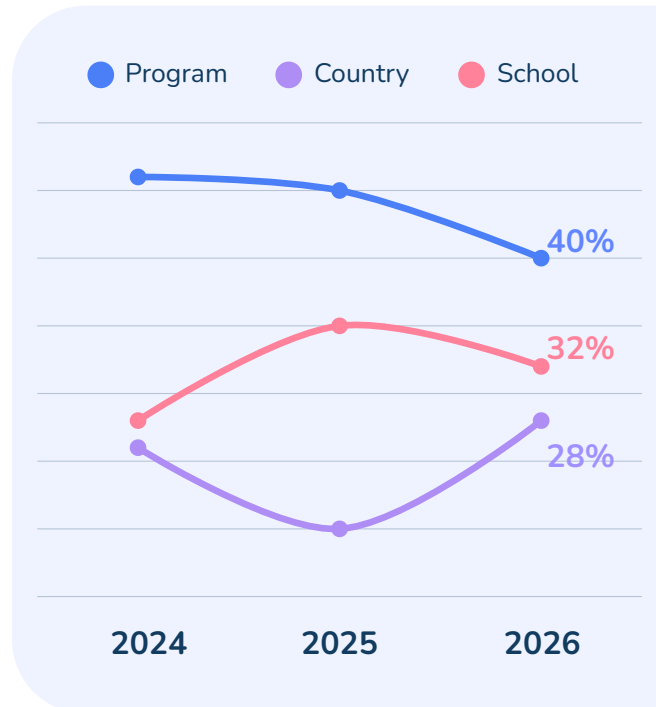
01 Policy changes reshape how students search

Program is consistently the most important factor when students choose an option for international study, but things are starting to change.

More students now say “country” is their top priority when choosing between study options (from 20% in 2025 to 28% in 2026), putting this option at its highest level in three years and a 40% YoY increase.

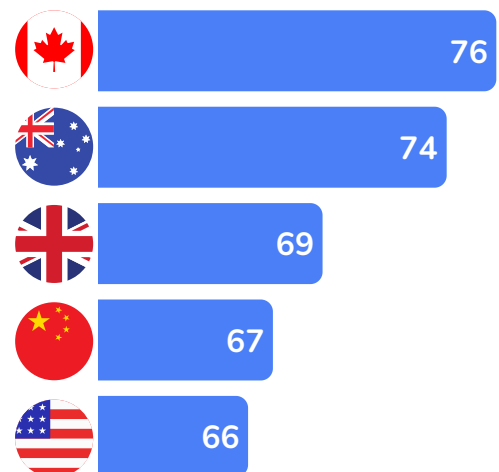
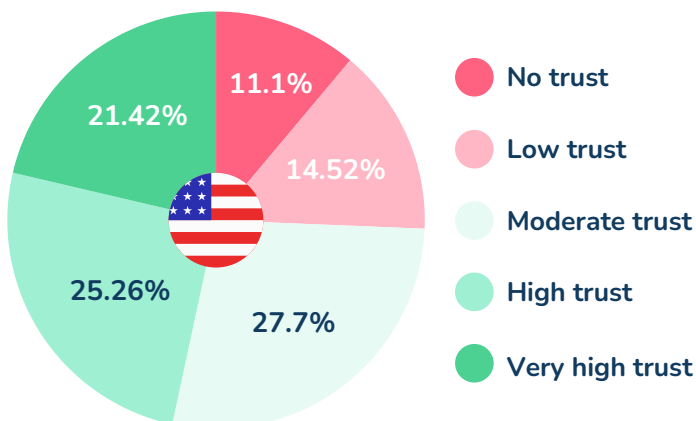
For South Asian respondents specifically, country (35%) now outranks program (31%). This is the only regional audience where we see this happen, and the one most exposed to recent visa and policy changes.

This suggests that students are ensuring their chosen destinations are accessible to them before they can consider institutions or courses.



02 Trust is lowest - and polarised - in the USA

When respondents were asked how much trust they have in each country's commitment to welcoming international students, the USA ranked last on weighted score - and how that score is distributed matters. Out of all destinations, the USA records the highest percentages of both "No trust" and "Very high trust" responses, showing a polarised view of how welcoming the country is perceived to be.



Weighted score shown above

Prestige is shared. Practicality Isn't.

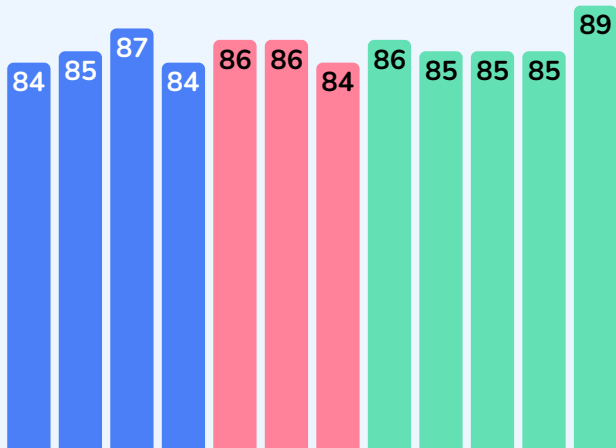
The **Big 4** still compete on appeal, especially when considering academic reputation and subject offering. But they don't have a commanding lead. And they're **falling behind on the practical considerations** that make studying abroad possible for many.

Affordability, for example, is a big concern for studying in the **USA** and the **UK**, especially when compared to alternatives like **Korea, China** and **Germany**. And when it comes to visas and entry requirements, as well as safety and stability, the USA is at the bottom of the list.

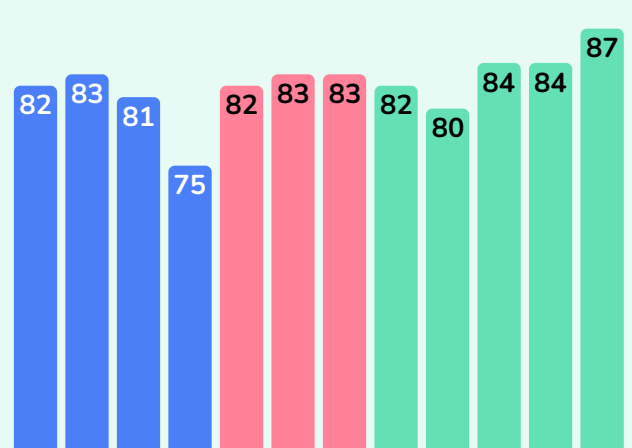
This divide between appeal and practicality for the **Big 4** shows that, while they're still ahead on reputation, that specific advantage is narrowing as other destinations become more serious contenders. At the same time, they're continuing to lose ground on more practical concerns as a consequence of policy disruption.



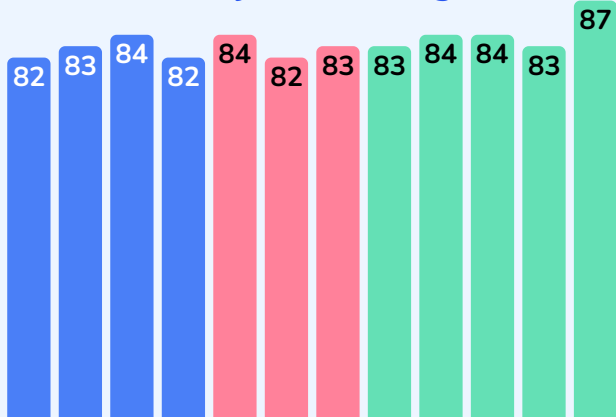
Academic Reputation



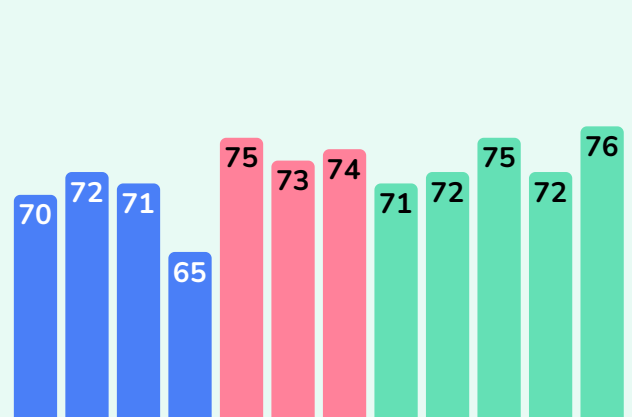
Safety & Stability



Subject Offering



Visas & Entry



Introducing the Keystone Student Sentiment Score

The **Keystone Sentiment Score**, currently launching in beta, brings together three distinct data sources — enrollment data, search behavior, and student opinion — to produce a single, trackable score for each study destination.

By combining these aspects, our Sentiment Score updates as the market moves, making it a practical tool for **monitoring competitive positioning in real time**, not just in hindsight.

How it's measured

Historical Enrolments

UNESCO data on total international enrolments for the most recently completed year (currently 2023)

Why?

Accounts for how well-established a destination is and helps balance out fluctuations in current audience behaviour.

20%



Student Perceptions

Average student ratings across Reputation, Subject Offer, Affordability, Visas, Safety, and Culture, drawn from **Keystone's Pulse Survey**

Why?

Measures how searching audiences perceive and rate their chosen destinations and how this changes over time.

80%



Search Change

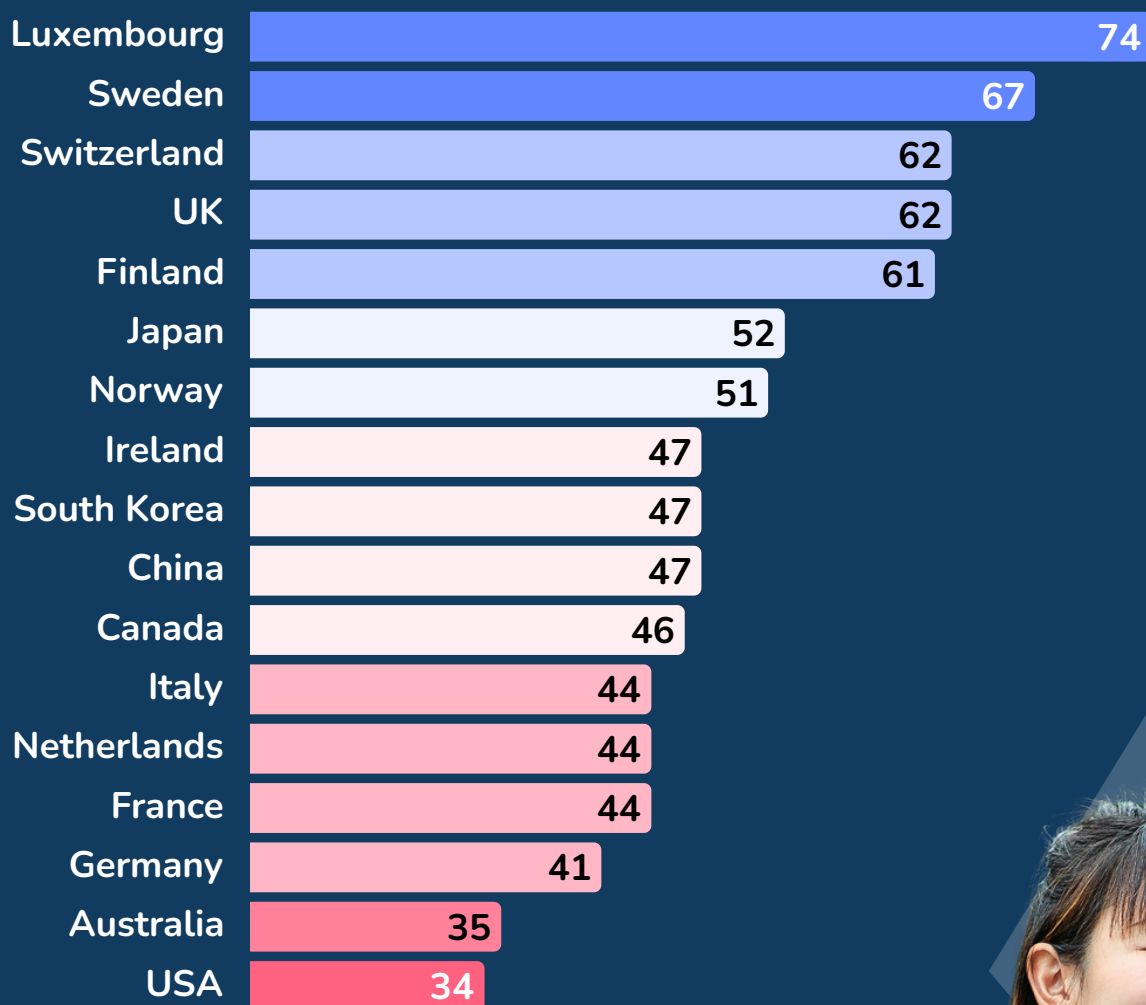
Current shifts in relative international **search interest across Keystone's platforms**, folded into the overall calculation to reflect real-time demand momentum

Why?

Measures whether audiences are more or less likely to search for a destination, reflecting current relative demand.

Keystone Student Sentiment Score

March 2026



Combining study, search and sentiment into **one datapoint**

European destinations — **Luxembourg (74)**, **Sweden (67)**, **Switzerland (62)**, **Finland (61)** — dominate the top of the table.

Meanwhile, the **UK (62)** is the only Big 4 destination to break the 60-plus bracket, as **Japan**, **South Korea**, and **China (all 47)** outscore both **Australia (35)** and the **US (34)**.

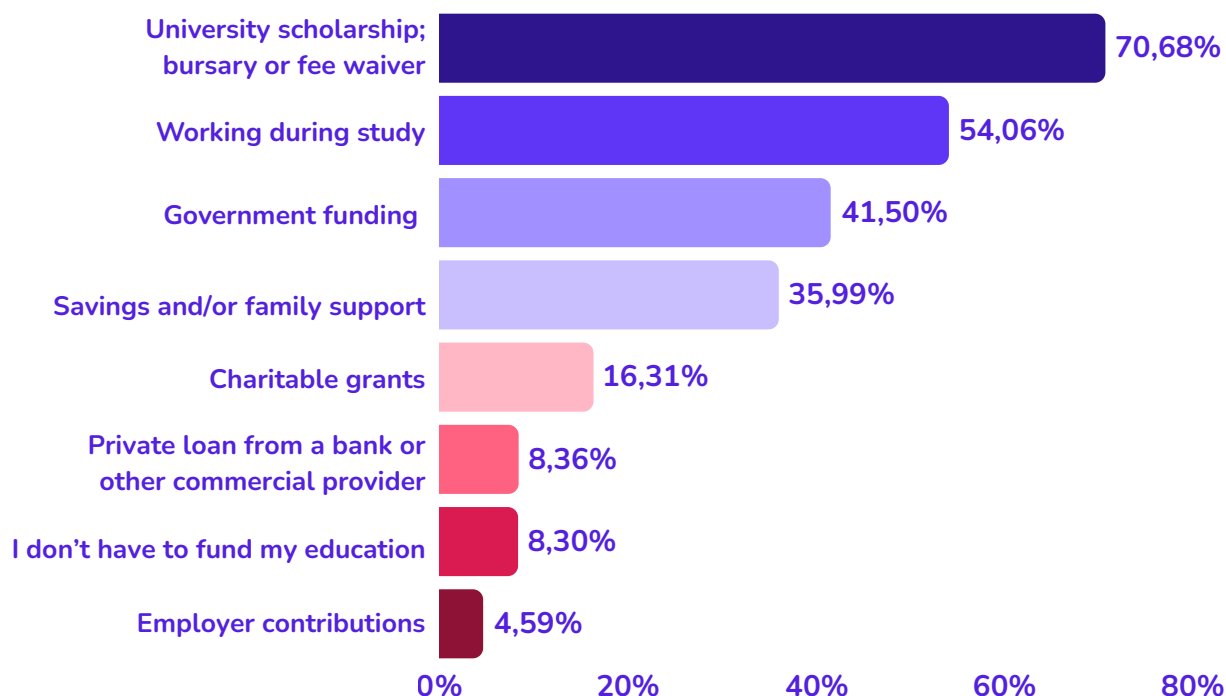


Funding & Obstacles



University support tops the funding mix, but most rely on multiple sources

We asked: How do you plan to fund your study? (Pick up to 3)



While **university scholarships and bursaries** are the leading funding source for international students (**70,68%**), most students are actually piecing together multiple sources of funding.

Over half (**54,06%**) plan to **work** during their studies, while some are looking to make use of **government funding (42%)**, or even **savings or family support (36%)**.

Subjects & Skills

What do you want to study?

Our Share of Search data shows it best: **students are focusing more on practical skills and less on theoretical degrees.**



Business & Economics, Clinical & Health and Education Studies have all grown this year, while Arts & Humanities and Social Sciences have taken a hit.

The outlier here is Computer Science: despite being a highly vocational field, interest in the subject has declined slightly. This could mean that wider availability and growing use of AI technology may be leading students to reconsider the value of a pure Computer Science degree as a route into certain careers.

"Our Share of Search data reveals what audiences are actively looking for across Keystone Websites and allows us to uncover broad trends over time. The one thing we clearly see here is the growth of more professional and applied disciplines, such as Engineering, Medicine and Education whilst relatively academic and theoretical fields such as Arts & Humanities and Social Sciences decline. This indicates that prospective students are focussing more on subjects they can readily connect to careers."

Dr. Mark Bennett
VP, Research & Insight
Keystone Education Group



1	Business & Economics	27%	23%
2	Arts & Humanities	20%	24%
3	Clinical & Health	19%	18%
	Engineering	14%	12%
	Social Sciences	13%	15%
	Life Sciences	9%	9%
	Computer Science	7%	9%
	Education Studies	7%	5%
	Law	5%	5%
	Physical Sciences	4%	4%
	Psychology	4%	4%

AI is reshaping student interest

While demand for **AI** as a specific skill has barely moved since last year, its influence is shaping skills around it.

Interest in 'AI-assisted' or 'AI-enabled' skills like **Web Design, Research** and **Coding** has increased, whilst **Data** (a competency that compliments and enhances AI tool use) has risen significantly. More 'AI agnostic' skills - such as Problem Solving or Critical Thinking - see some declines, but remain highly popular.

The overall data trend suggests that, rather than wanting to learn *about* AI technology, students are more interested in competencies that compliment AI applications. And they still value what universities have to offer.

	Bachelors		Masters		Doctoral	
	2026	2025	2026	2025	2026	2025
Research	36%	33%	56%	45%	81%	78%
Data	24%	17%	33%	24%	43%	33%
Problem Solving	41%	46%	45%	51%	44%	53%
Teamwork	42%	44%	44%	44%	38%	38%
Critical Thinking	38%	43%	42%	46%	44%	53%
Project Management	33%	27%	39%	33%	35%	29%
Management	30%	31%	34%	36%	22%	23%
Time Management	34%	31%	27%	25%	21%	22%
Written Communication	24%	18%	26%	20%	27%	24%
Oral Presentation	19%	22%	20%	22%	20%	23%
Web Design	22%	10%	13%	7%	9%	2%
Coding	15%	13%	12%	10%	12%	12%
AI	13%	12%	12%	12%	10%	13%
Sales & Marketing	16%	19%	9%	13%	3%	4%
Visual Communication	12%	15%	8%	12%	5%	7%

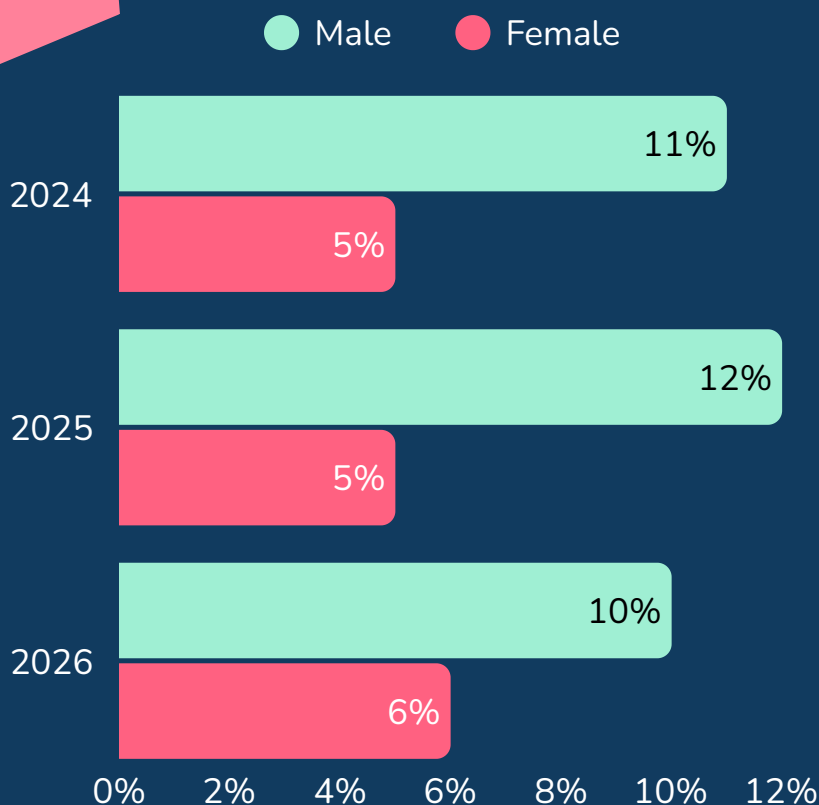
Genders diverge on Computer Science

Within the wider subject of technology, another interesting trend arises: Computer Science is the only subject in the whole dataset where male and female interest is moving in opposite directions.

Male interest in Computer Science has declined from 12% in 2025 to 10% in 2026, while **female interest has grown** from 5% in 2025 to 6% in 2026.

One possible explanation for this split might be that men and women are interpreting AI's impact on the field differently: where male audiences may see AI as reducing the value of a Computer Science degree, while female audiences may see it as simply lowering barriers to entry.

This kind of gender-specific shift for a single subject could have implications for how institutions position their Computer Science programs, especially when it comes to defining a target audience.



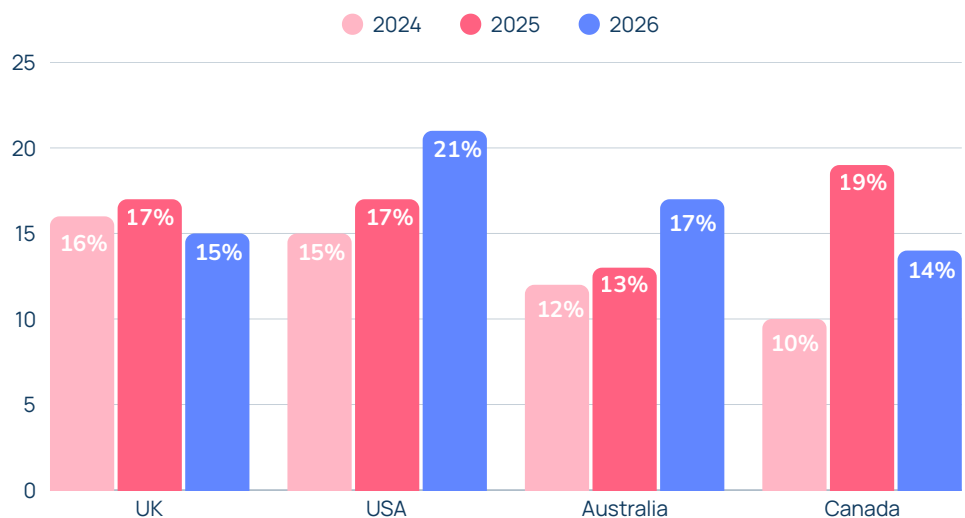
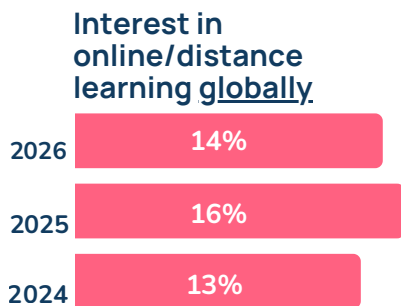
Flexibility

How do you prefer to study?

Preference for physical study abroad remains strong, holding steady at around **85%** overall. But beneath that headline, destination-level data tells a different story — and nowhere more sharply than the **USA**, where interest in fully online study has jumped **4%** since 2024 to reach **21%**, well above the **14%** global benchmark for 2026. The **UK** and **Canada** remain stable, while **Australia** inches upward.



Interest in fully online study varies by destination



The US workaround:

For US institutions, online delivery is no longer a fallback; **it's a strategic route for students whose appetite for the US hasn't faded**, even if their willingness to travel has. And since they may be choosing it reluctantly, quality and belonging will decide whether they convert.

The wider lesson? Flexibility isn't rising everywhere; overall interest is down this year. Destination context is what shapes how students want to engage.



Why US-bound students are choosing online

There's a strong correlation between audiences' preferred delivery method for US study and their feelings about the US as a destination. Audiences considering online study are 10 percentage points less likely to feel positive about their safety whilst studying in the USA. A clear signal that perception is driving behaviour.

Two years of rising interest in online study in the US is a real outlier against broadly flat or falling trends elsewhere.

Digging deeper into this audience shows what's driving that trend. In a world of SEVIS cancellations and travel disruption, students see online study as a **route to the reputation of a US degree without the current risk.**

	Online	On campus
Not at all confident	14%	10%
Slightly confident	10%	9%
Moderately confident	26%	22%
Very confident	32%	36%
Extremely confident	17%	23%
Weighted Average	65%	71%



Dr Mark Bennett
VP of Research & Insight

"The drivers of online study interest now have more to do with policy than practicality. We've seen two years of growing interest in online study in the USA, and our data reveals that those audiences are significantly more likely to be concerned about their safety as international students there. But we don't see students turning away from the USA completely: the appeal of US study is such that audiences will seek alternative routes to access it."

Motivations & influences

Motivations vary by level, as expected. Bachelors audiences lean toward experiential drivers like adventure and challenge. But beneath these differences, a clearer shift is emerging in how students frame the value of a degree: Career entry is declining (especially for bachelors), while career progress is rising. Developing useful skills remains the top driver, and earnings are climbing steadily.



"Students may not simply be thinking about what they can do the year they earn their degree, but more about what their degree is still doing for them several years in the future."

**Dr. Mark Bennett, VP, Research & Insight -
Keystone Education Group**



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

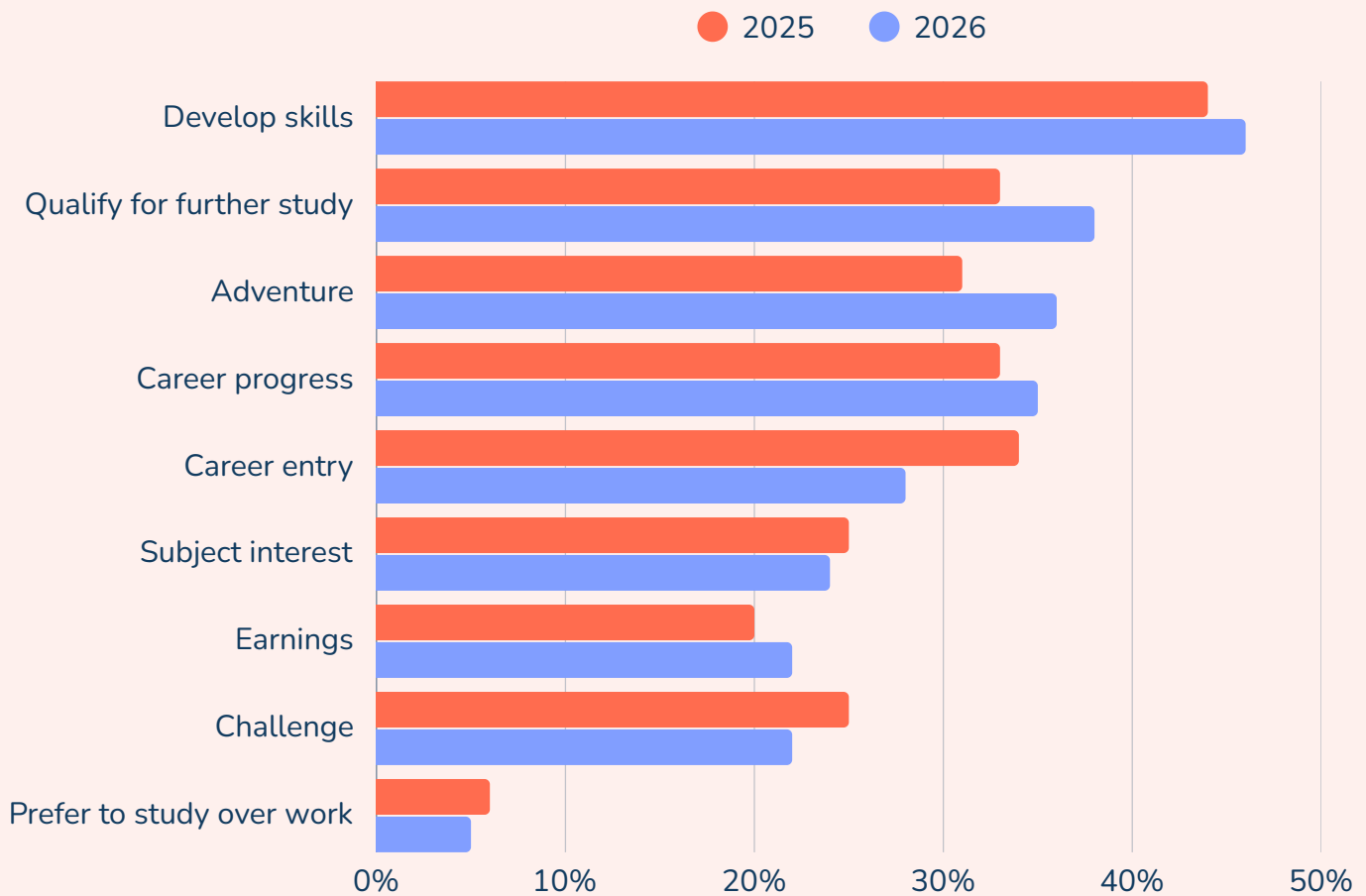
For institutions, this reshuffles where the messaging emphasis should sit. Career entry, once a reliable hook, is losing ground, while the drivers that endure (skills, progression, adventure) all point further into the future. Recruitment messaging that leads with "get a job after graduation" is increasingly out of step with what students are actually buying.

The real opportunity is to position a degree as a **long-term asset**: something that compounds in value, opens doors years down the line, and delivers experiences that shape who they become. Show the decade, not the year.



We asked:

What are your top 3 motivations for studying?



How motivations shift by level

	Bachelors		Masters		Doctoral	
	2025	2026	2025	2026	2025	2026
Qualify for further study	31%	32%	36%	43%	/	/
Challenge	27%	24%	23%	20%	28%	23%
Career progress	23%	26%	39%	40%	44%	46%
Prefer to study over work	7%	6%	5%	4%	8%	7%
Career entry	38%	26%	33%	26%	31%	28%
Develop skills	43%	46%	44%	47%	43%	44%
Earnings	19%	23%	20%	22%	20%	22%
Subject interest	26%	26%	24%	22%	40%	39%
Adventure	35%	38%	30%	36%	22%	27%

Differences by level mostly make sense. **Career progress matters more at higher levels, while adventure and challenge resonate more at lower ones.** Overall, though, the broader narrative holds fairly consistently across levels.

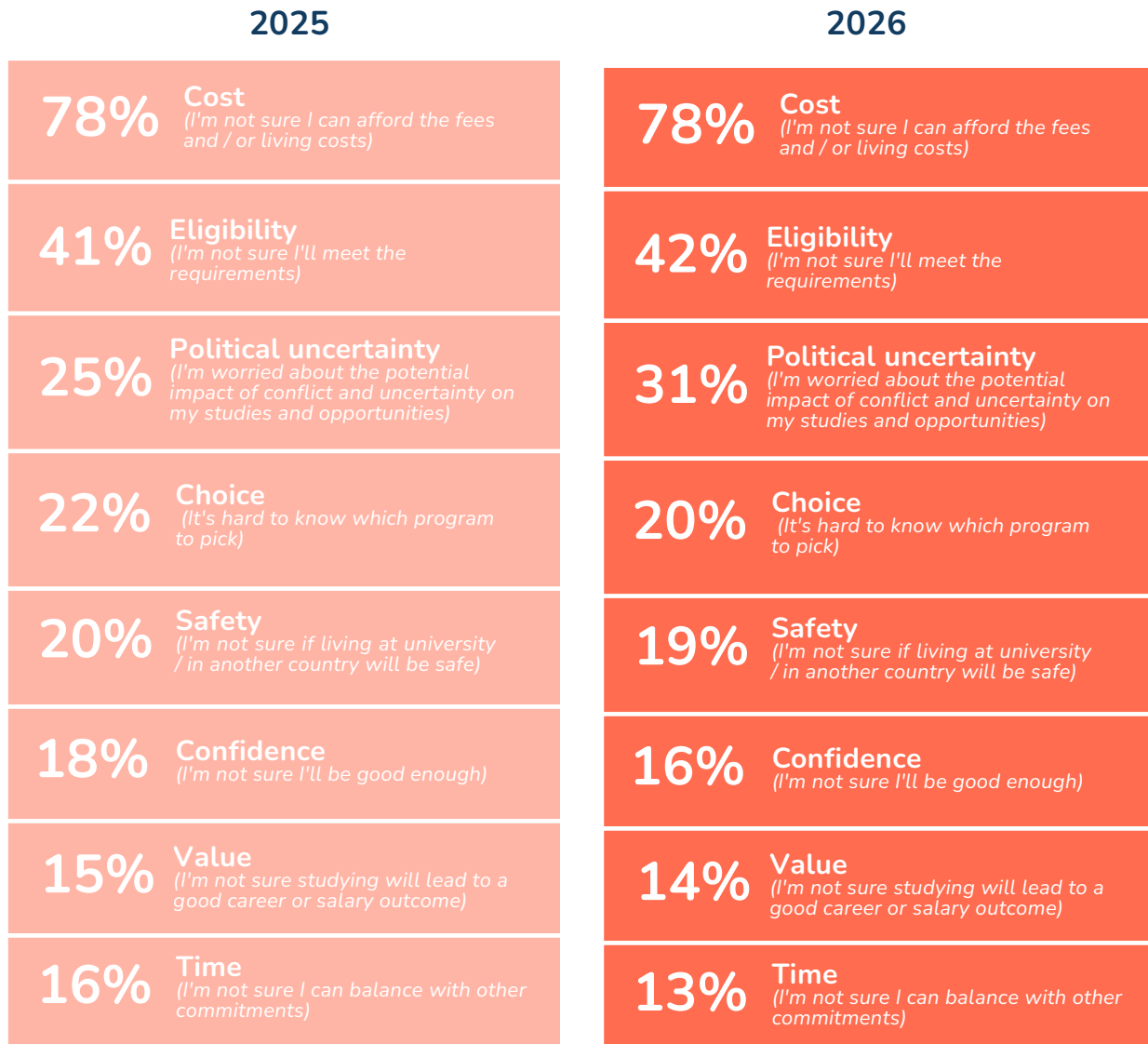
For institutions, this means the long-term value story works across audiences, but the framing should flex: **lead with growth and progression for postgraduates, and with experience and self-discovery for undergraduates.** The destination is the same, students seeking lasting value, but the journey there looks different at each stage.



External doubt, not self-doubt

Political uncertainty is the fastest-rising concern about studying, outpacing every other factor.

This aligns with falling trust in the **USA**, uncertainty around the **UK**, and growing interest in TNE and online alternatives. Confidence is declining; students worry less about their ability to succeed than their opportunity to do so. Cost is flat, with little room to grow.



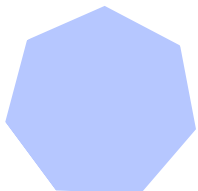
The good news is that students still believe in themselves. Confidence isn't the issue; it's the world around them that's harder to read. That's actually an opportunity. Affordability and academic support remain essential, but the institutions that lead on clarity, visa pathways, post-study work, safety, and visible commitment to their international community will be the ones students choose with conviction.



Different stages, different worries

The level-by-level picture confirms a single broader story: the type of worry is shifting, but the worry itself is universal. Bachelors lean on internal concerns (*am I ready, am I eligible, am I picking the right thing?*), while postgraduates skew toward external ones (cost, geopolitics). The common thread is that political uncertainty is rising sharply at every level, the only concern that doesn't discriminate by stage.

	Bachelors		Masters		Doctoral	
	2025	2026	2025	2026	2025	2026
Cost	73%	72%	80%	83%	85%	82%
Eligibility	40%	45%	41%	42%	41%	39%
Political uncertainty	23%	29%	26%	33%	24%	30%
Choice	22%	22%	23%	20%	20%	20%
Safety	22%	20%	18%	18%	17%	17%
Confidence	23%	20%	15%	13%	15%	15%
Time	15%	15%	14%	12%	16%	15%
Value	16%	14%	14%	14%	14%	14%



"The striking increase here is in the proportion of respondents citing political uncertainty as a concern for study abroad — more than safety, this is the rising concern, with an increase of 24% since 2025. Today's prospective international students are less likely to question their capability and more likely to worry about their opportunities."



Dr. Mark Bennett, VP, Research & Insight - Keystone Education Group

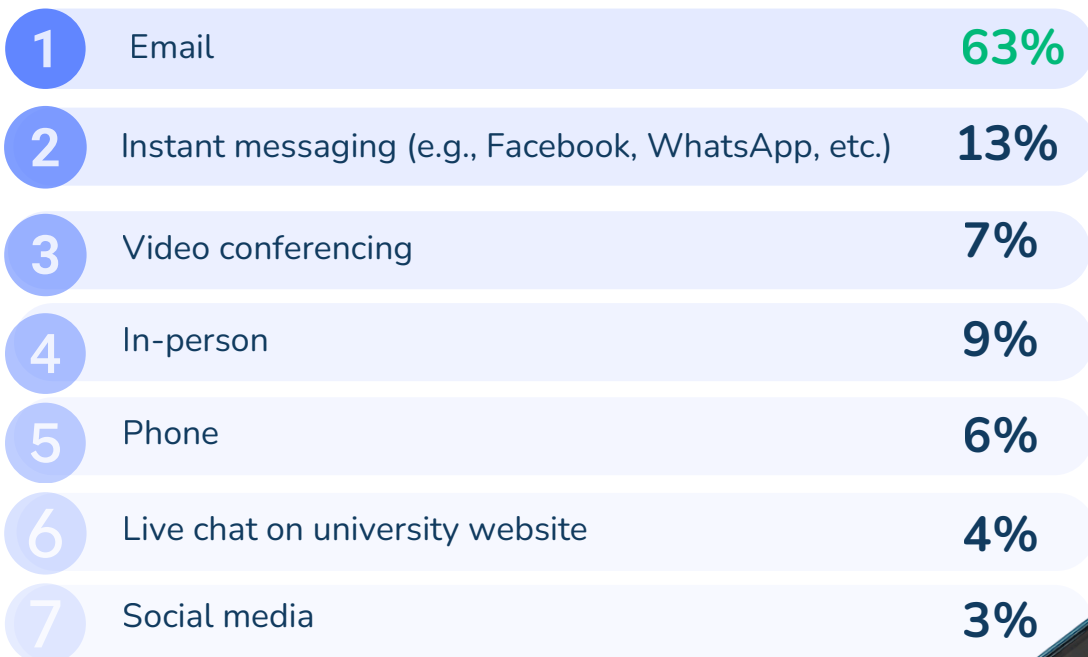
Communications & social media



Email remains the winner

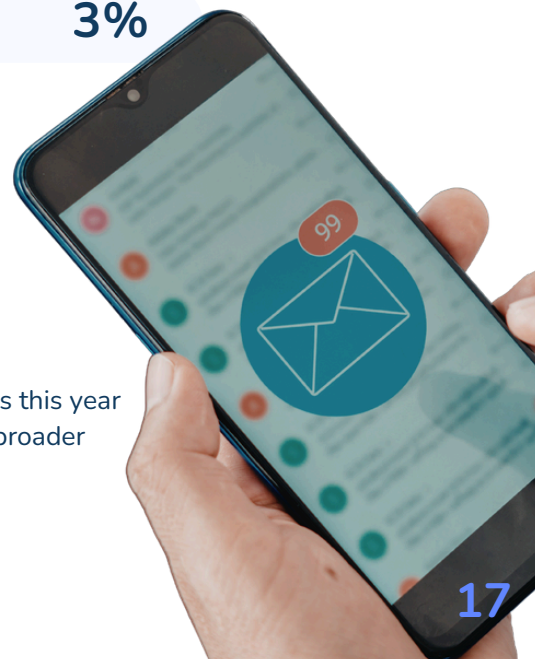
We asked:

How would you prefer to communicate with a school/university?



Last year's story was a sharp move toward direct, human channels, tripled as audiences pushed back against AI and arms-length communication. This year, in-person is holding its ground, while instant messaging and video conferencing are slipping. The quiet recovery of Email suggests audiences may be growing wary of instant messaging as potentially automated, with email feeling more verifiable by comparison.

Email remains the preferred channel, edging up slightly from 2025. Shifts this year are subtler than last year's, but we may still be living through the same broader paradigm shift.



One size doesn't fit all: Channel preferences by level

Bachelors students

The personal touch

52%

prefer email
(lowest of all levels)

3x

in-person since 2024

- Highest comfort with instant messaging (18%)
- Strongest shift toward in-person and phone
- Want a personalized, human experience

Masters students

Back to email

70%

prefer email
(up from 65% in 2025)

+10%

prefer instant messaging
(down from 13% in 2025)

- Biggest swing back to email of any level
- Older audience favoring verifiable channels

Doctoral students

Relationships matter

72%

prefer email
(highest of all levels)

10%

prefer video calls

6%

prefer in-person

- Strong rise in in-person reflects complex application process
- Most open to video conferencing of any level



“

Student communication behaviors change slowly, so when they shift, it's worth paying attention. Email is holding firm, while instant messaging slips, and the need for in-person connection rises. These look less like passing preferences and more like considered responses to a recruitment landscape shaped by AI and automation: students gravitating toward channels that feel human and verifiable, and pulling back from those that don't. And the behaviors vary sharply by level. The picture is more textured than it's ever been, and one channel can't carry the conversation anymore.”



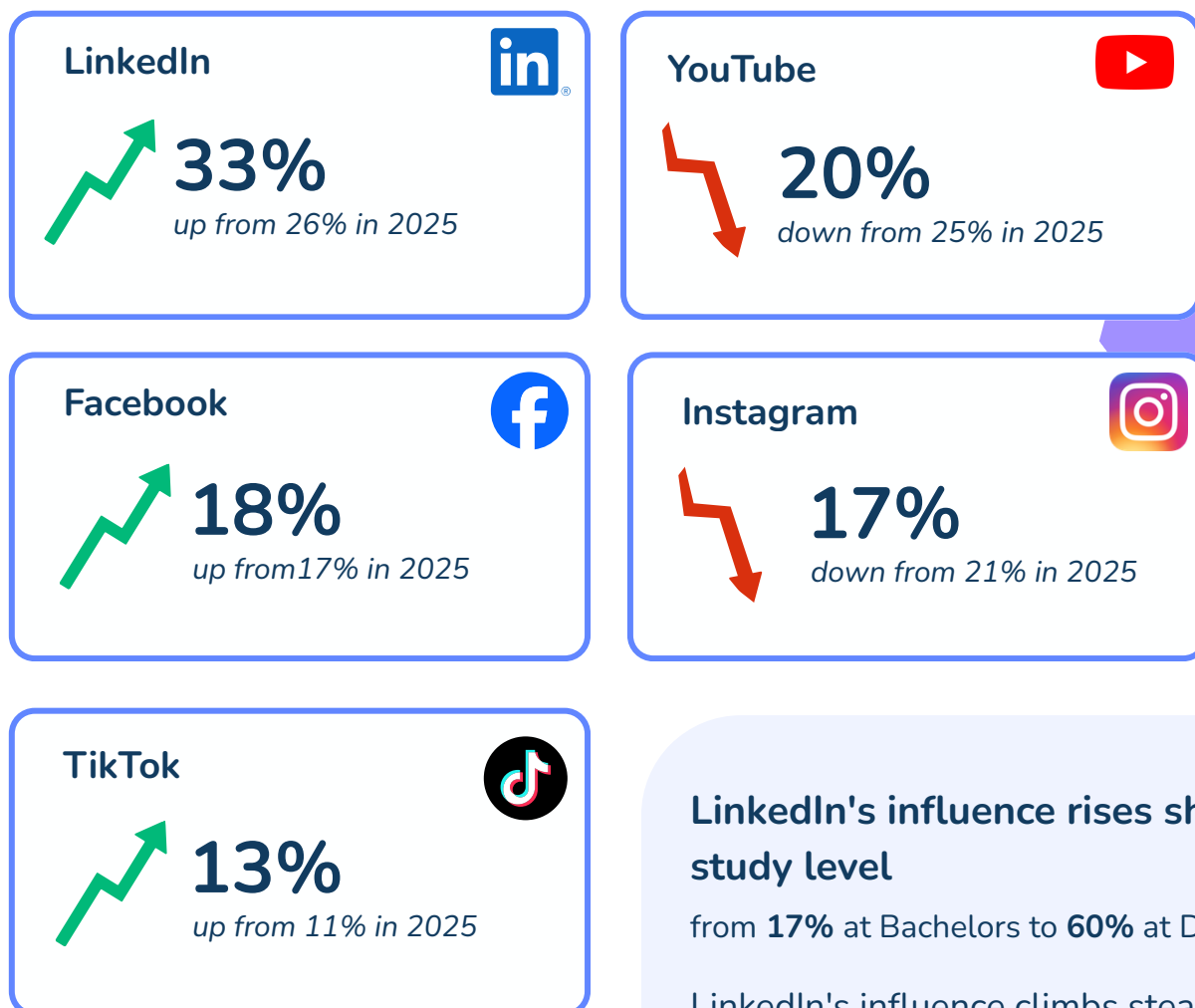
Jennifer Parsons - UniQuest and Keystone Enrollment Services

Social media's professional turn

LinkedIn is rising sharply as an influence on study choice while YouTube falls, echoing the broader shift toward longer-term career motivations: as audiences think more professionally about study, they're researching universities through more professional channels. TikTok is also growing in influence, especially among Bachelors, while Facebook holds steady.

We asked:

Which social media influences your choice of education the most?



LinkedIn's influence rises sharply with study level

from 17% at Bachelors to 60% at Doctoral

LinkedIn's influence climbs steadily with study level, reflecting an increasingly professional mindset as audiences progress. The biggest shifts occur at the Bachelor's and Master's levels, while Doctoral patterns remain relatively stable.

Connect where their professional future is taking shape!

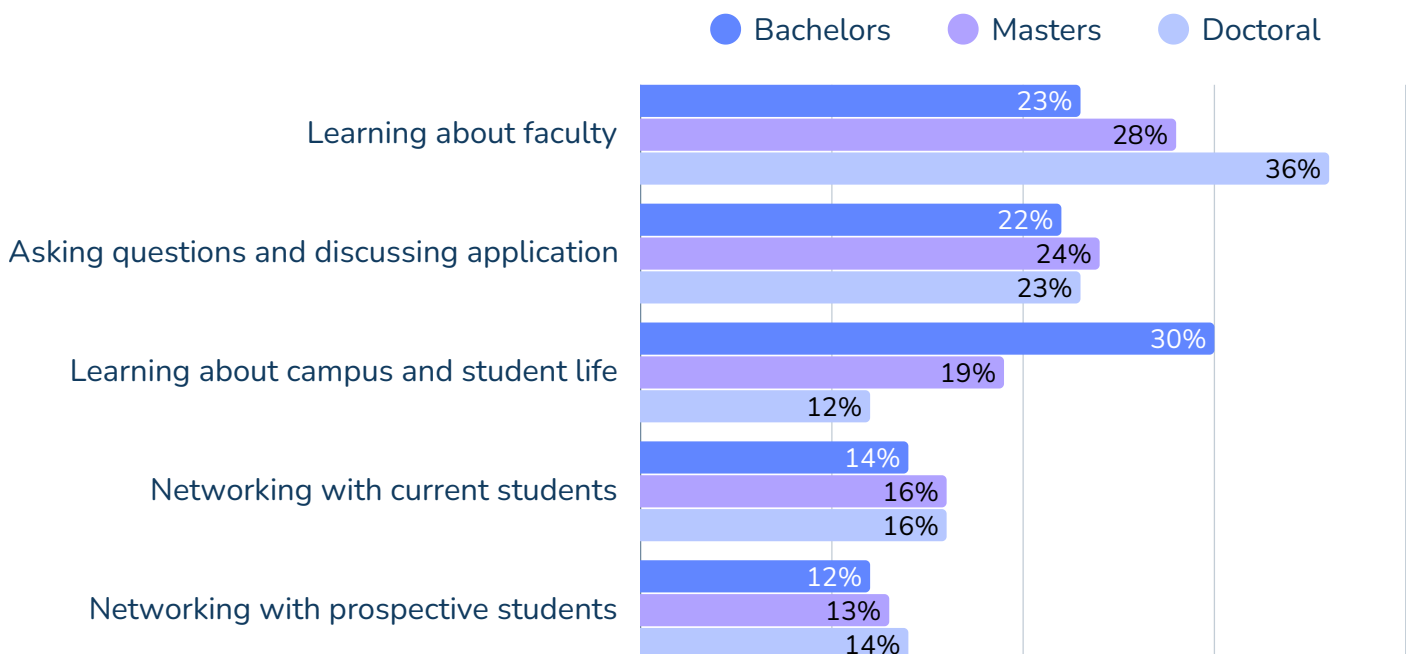


Information over connection

Despite being on social media, prospective students are using it more for research than for relationships, with networking accounting for less than a third of use at every level. What they're researching, though, shifts notably by stage: campus life dominates for Bachelors, faculty matters most for Doctoral, while application questions stay a constant priority throughout.

We asked:

What content and information about education is most valuable to you on social media?



What this means in practice



Tailor content by level

Campus life for Bachelors, faculty and research for Doctoral, a mix for Masters.



Treat social as research, not community

Students come to learn about the institution, not primarily to connect with peers.

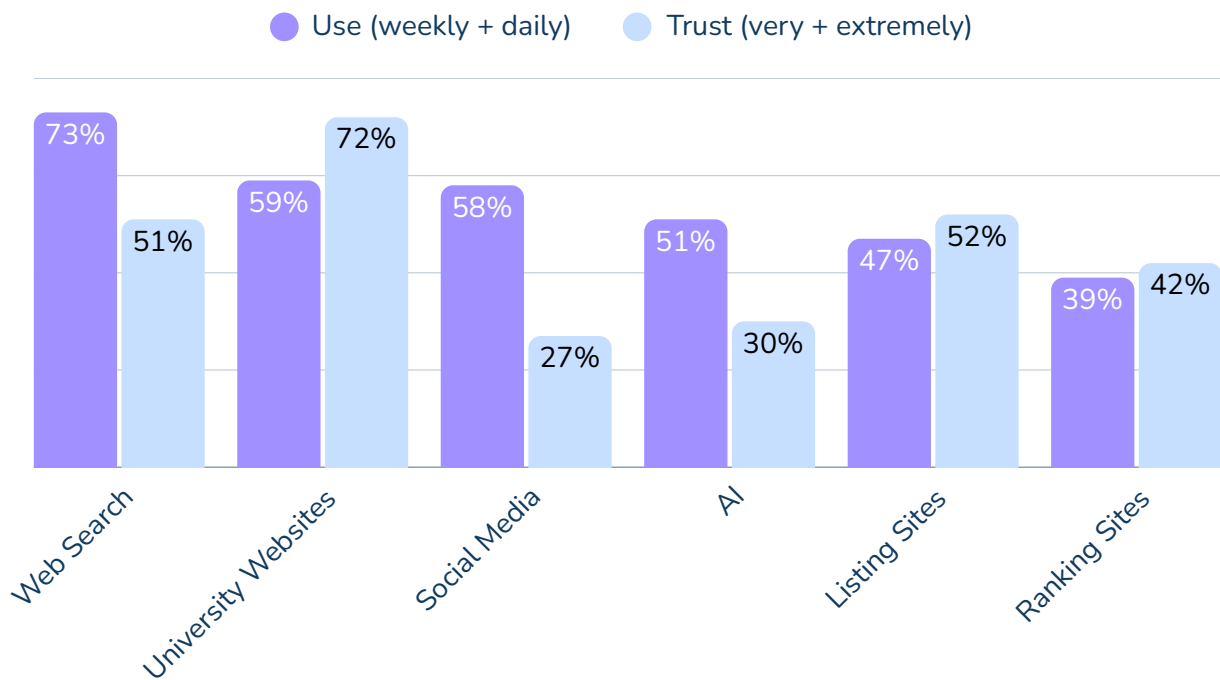


Keep application content evergreen

Application questions are a constant priority - make this content easy to find year-round.

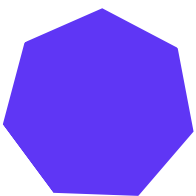
Use most doesn't equal trust

The channels prospective students use most aren't the ones they trust most, and the gap is starkest for AI. While AI is used almost as often as university websites, students place nearly **4x more trust** in the latter. Despite the rise of generative tools, audiences still gravitate toward curated, institutional sources when it counts.



The takeaway here is reassuring for institutions: even as AI and social media reshape how students search, they haven't reshaped who students believe. University websites remain the anchor of credibility, the one channel audiences approach with conviction rather than uncertainty.

Generative and broad-search tools may dominate the discovery phase, but trust still flows to curated, human-crafted sources. The implication is clear: **investing in owned channels and curated partnerships isn't just defensible, it's where decisions actually get made.**



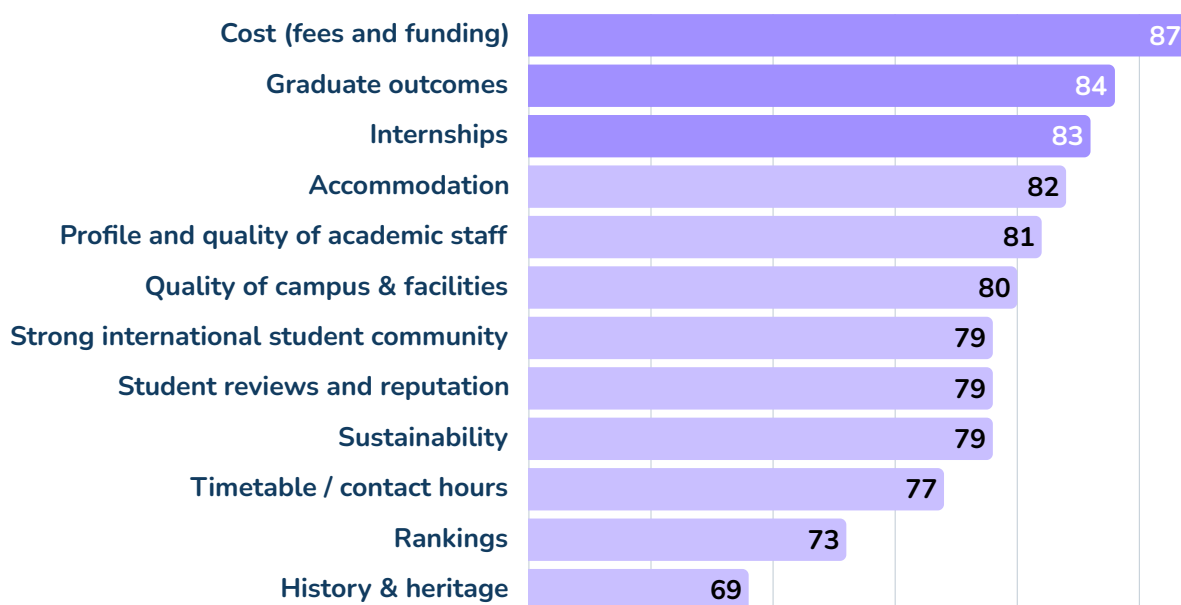
Student decision-making factors

Students may be worried about cost, but they're actively weighing it against potential returns. We asked them what's important when it comes to making their study choices.



Return on investment is driving choices

Students are now placing less importance on traditional markers of reputation, such as rankings and heritage, and focusing on the practical aspects of what their degree can do for them in the long run. **They want good careers over institutional prestige.**



Weighted score shown above

This is good news for higher education institutions, as in a difficult climate of rising costs and policy instability, **this is a factor they can control.**

Promoting graduate outcomes, highlighting successful alumni and providing guidance on potential career paths can provide students with solid evidence of a programme delivering good ROI.



Whilst it may be hard to adjust the 'sticker price' of a degree (and perhaps more so for international students in some countries) we can talk about the return on investment (in terms of internships and graduate outcomes) along with what that investment purchases in terms of campus, community and course content."

Dr. Mark Bennett
VP, Research & Insight
Keystone Education Group



How many applications are students making?

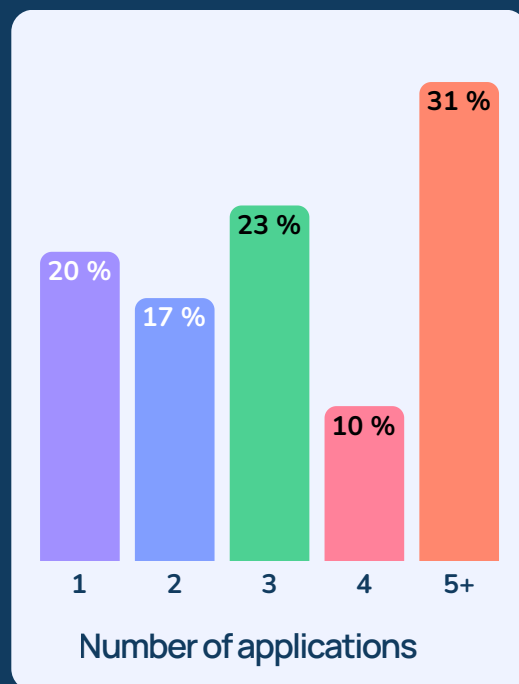
Spreading out, not just bunching up

Students are increasingly clustering at either end of the application spectrum. More are making five or more applications than ever before, while the middle ground of three or four is shrinking.

One application (20%) and three applications (23%) remain popular choices, but the **clearest year-on-year shift is the growth at 5+, now the single most common approach at 31%.**

This is especially true for **PhD** applicants, almost half of whom (49%) plan to make **five or more applications.**

This shows that, despite sharing the same uncertain environment, students are splitting into two clear camps: **either widening their options, or focusing on a single goal.**



How long are students spending on research?

They're taking their time

Students are taking longer to research their options before they commit.

The proportion of students who expect to finish their research and come to a decision in less than six months fell to its lowest point in since 2022, accompanied by a slight rise in those expecting to take a year or more. This slowdown is consistent across all study levels, too.

With rising political uncertainty, this rise in caution isn't a surprise. Students are navigating an increasingly difficult environment of policy changes and rising costs, so they're taking more time to ensure they make the right decision for their future.

	2026	2025	2024	2023	2022
Less than 6 months	47 %	53 %	51 %	56 %	45 %
6-12 months	30 %	28 %	28 %	29 %	35 %
(Less than 1 year)	77 %	81 %	79 %	85 %	81 %
12-24 months	13 %	12 %	13 %	10 %	12 %
24-48 months	9 %	8 %	9 %	5 %	7 %
12 months+	22 %	20 %	21 %	15 %	19 %



The State of Student Recruitment 2026

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Thursday 18 June
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3:00PM UK | 4:00PM Central Europe





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