

2025



# State of Student Recruitment

UK as a study destination

Students who want to  
Study in the UK in 2025

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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.

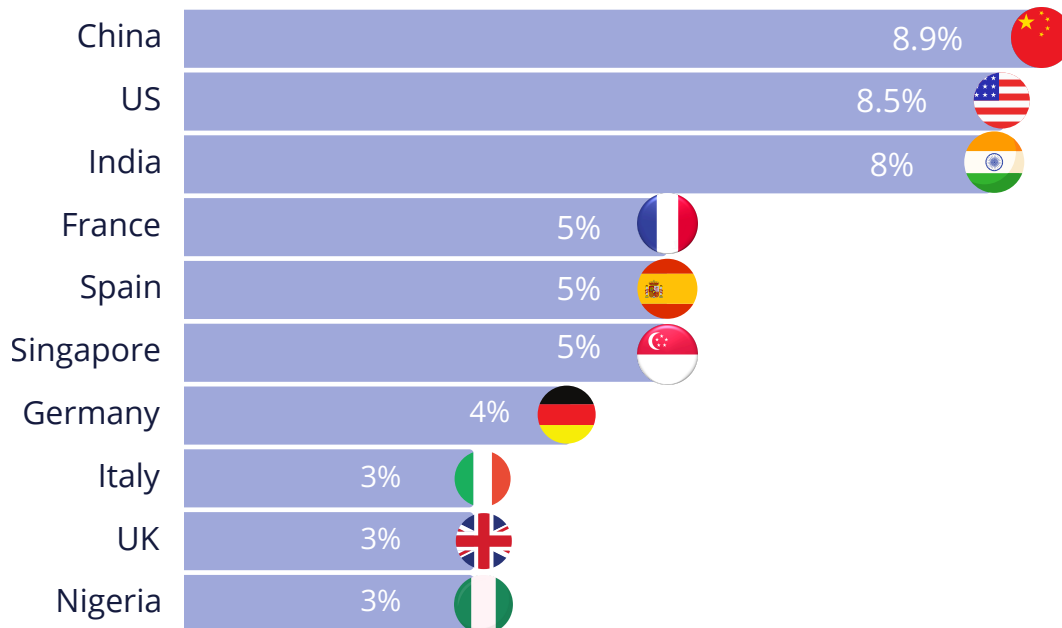
In this edition, we look specifically at students who want to study at UK institutions.

Our 2025 State of Student Recruitment Study in the UK 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

# Top nationalities interested in studying in the UK in 2025



Interest in the UK has continued to rise over the past 2-3 years. It was voted the top study destination overall in Keystone's 2025 State of Student Recruitment report.

Through our student search websites, we also saw the number of searches for UK institutions increase by 34% January to June 2025 compared to the first half of 2024.

When it comes to Bachelors/undergraduate students, the UK drops to second place, with the US topping the list. At Masters and PhD level, the UK is the strong favourite.

*"We certainly saw an increase in web traffic in the last cycle from some of these markets, notably from India, the US and Indonesia. But they have not necessarily translated into applications - that is going to take some time. So the interest is there, but the conversions aren't so much at the minute."*



**Anna Sheldrick**  
Marketing Campaigns  
Manager, University of  
Sheffield

*"The signals are arguably stronger than last year. I think there was a little bit of a 'hump' for the UK last year, there is now a feeling we are over that, but it is still fragile. We've got to work harder. Students are more methodical, more meticulous, more scrupulous before they commit... In terms of markets for Edinburgh, North America is strong, and there are growth markets within Asia, in particular Malaysia and Indonesia. The UK remains a strong offering."*



**Ewan Fairweather**  
Postgraduate Recruitment  
Manager, University of  
Edinburgh

# Student motivations

The top motivation for students wanting to study abroad is to develop their skills, with 42% of students saying it was their top motivating factor. This reflects the strong importance students place on gaining practical capabilities that support employability and career-readiness.

Closely following are motivations related to career progress (38%), career entry (36%), and to qualify for further study (33%). These responses collectively suggest that students continue to prioritize outcomes that support long-term professional and academic advancement, with institutional prestige or rankings playing a less central role.

## Top reasons students want to study (students who want to study in the UK)

1	To develop my skills
2	To progress in my current career
3	To qualify for a specific career
4	To qualify for further study
5	Interested in my subject

## Top reasons *all* students want to study

1	To develop my 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

## Students wanting to study in the UK consider the programme before the school

We asked : Which do you consider first?

Programme  
**51%**

School  
**32%**

Country  
**17%**

The programme remains the most important first choice factor, with over half of international students prioritising it when considering UK study.

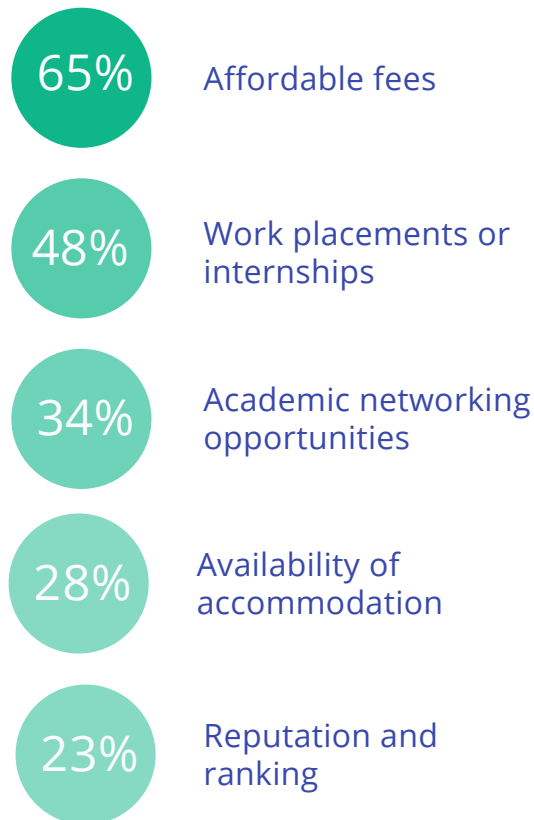
There is a subtle shift in decision-making: influence is moving away from the country level and increasingly towards the school level.

The rise in focus on schools (32% vs 29% in 2024) and the drop in focus on country (17% vs 20% in 2024) suggests students are becoming more targeted in their approach, starting with the specific programme that interests them and working backwards.



# Most important factors in a degree for students

Affordable fees are the most important factor for international students wanting to study in the UK, with almost two thirds citing them as the most important factor in a programme.



*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.*

*That is evident in the importance students put on 'academic networking opportunities'. It becomes more important as a factor 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."*



**Mark Bennett**

VP Research & Insights,  
Keystone Education Group

## Top subjects to study in the UK

- |                          |                |                     |
|--------------------------|----------------|---------------------|
| 1 Law Studies            | 6 Education    | 8 Finance           |
| 2 Psychology             | 7 Marketing    | 9 Legal Studies     |
| 3 Procurement Management | 5 Architecture | 10 Economic Studies |
| 4 Journalism             |                |                     |

# Flexibility

## The rise of transnational education

Audiences are potentially becoming more inclined to consider alternative means to accessing overseas degrees due to geopolitical uncertainty, for example, through transnational education or studying online.

In the UK, interest in TNE is slightly lower than the global average. UK domestic students are less inclined to see TNE as an attractive option compared to global domestic audiences. However, the overall trend is consistent: students wanting to study at home show more openness to TNE than those planning to study abroad.

We asked students:

**Would you consider studying an overseas degree at an international campus in your home country?**

**Yes**  
35%

**Maybe**  
29%

**No**  
36%



*De Montfort has been a pretty big player in TNE provision for quite some time. We have a significant history in that space. It's the appeal of a UK-validated education without encountering the barriers of studying internationally, plus undergraduate to postgraduate 'top up' opportunities. (Colleagues and I) were talking in a session recently, and we said if in three years time, the government pulls up a drawbridge to international students, how does that work for your institution? It is probably worth starting to think about if you haven't already."*



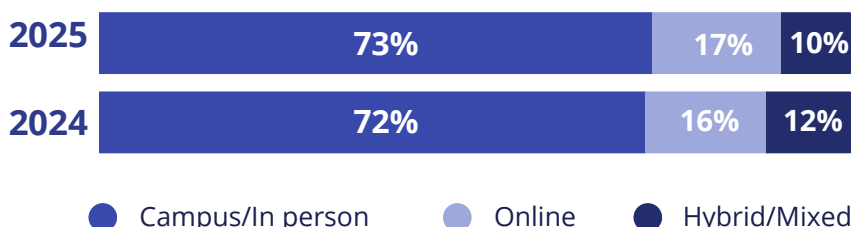
**Elliot Newstead**

Associate Director of Future Students,  
De Montfort University

From Keystone's webinar: *State of Student Recruitment UK: Opportunities in a Shifting Landscape* (September 2025)

## International students prefer UK on campus study

**How students prefer to study at UK institutions:**





# Influences

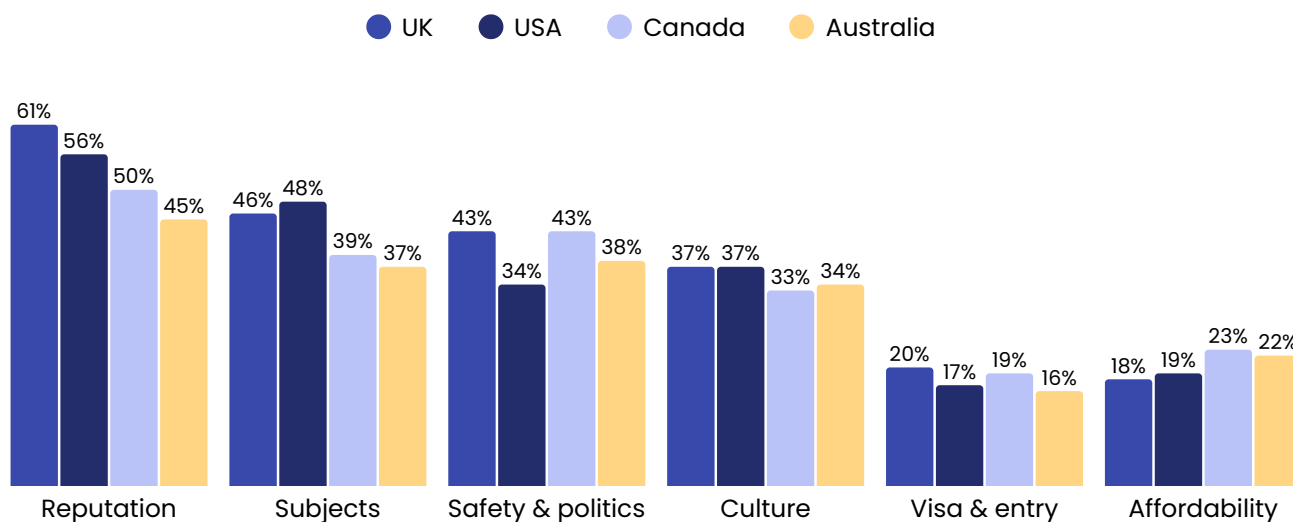
## How do students perceive the UK?

When compared to the other 'Big Four' study destinations, the UK is thought to be the 'best' in terms of 'academic reputation' and 'safety and political stability'.

It is, however, perceived to be least affordable out of the US, Canada and Australia.

How the UK ranks compared to the Big Four:

- Academic reputation 1st
- Distinctive subjects 2nd
- Safety & political stability =1st
- Culture =1st
- Visa & entry requirements 1st
- Affordability 4th



*'Cost and affordability' is definitely still a key factor, although much of that is tied to the idea of London and the affordability of living in the capital city, as opposed to different affordability levels across the UK. The key is to balance the message around affordability between our London campus versus our other campuses."*



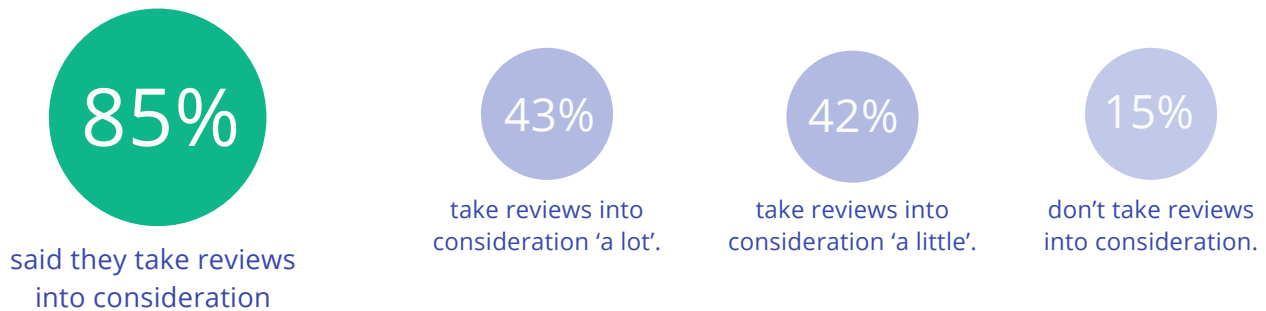
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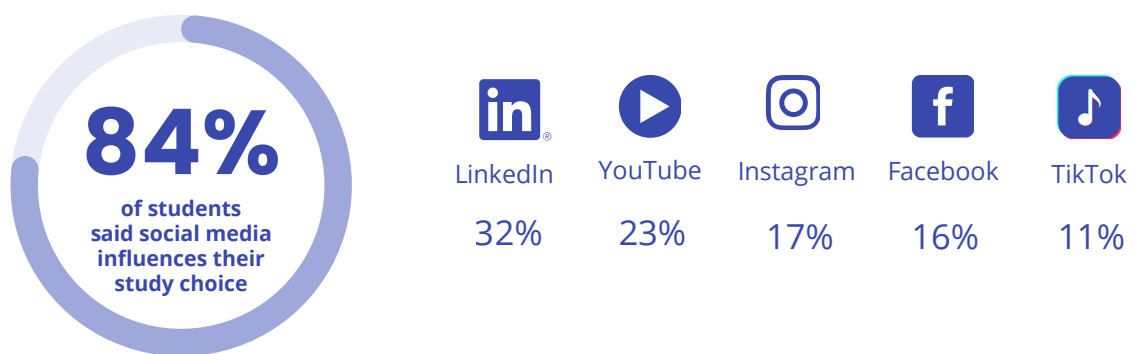
## The power of student reviews

With peer-to-peer communication on the rise, we asked students if they take reviews into consideration in their decision-making, with **43%** of students saying they did 'a lot'.



## LinkedIn the most influential channel for students

In comparison to all destinations, international audiences looking at the UK are more likely to turn to LinkedIn and YouTube, but less likely to use Instagram, Facebook and TikTok.



## Top factors influencing students' decisions to study in the UK

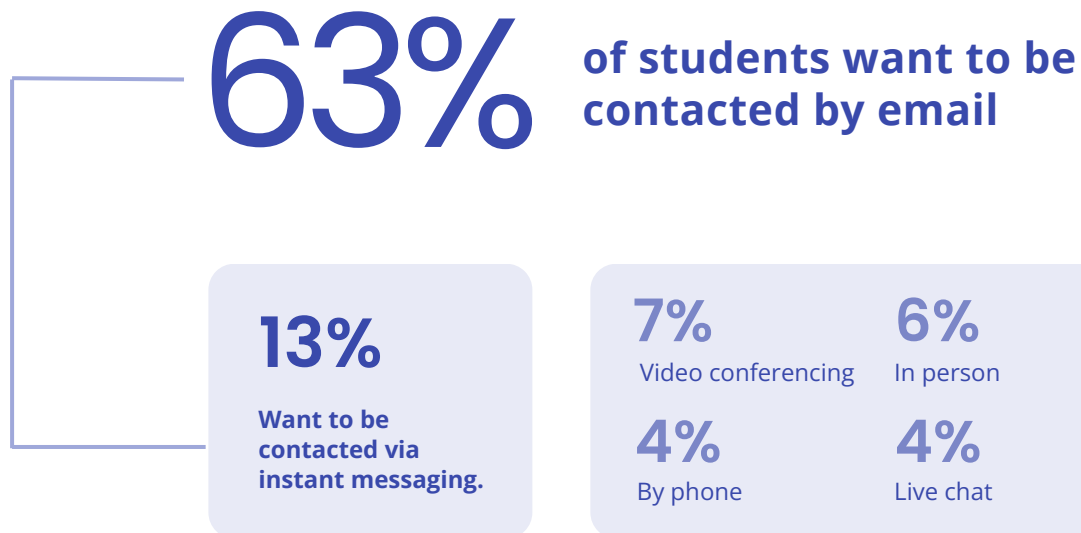
	2025	2024
Subjects & study opportunities	63%	51%
University fees & living costs	50%	34%
Post-study work opportunities	45%	36%
Reputation & university rankings	42%	41%
Culture & leisure opportunities	30%	28%

Students prioritise subject & study opportunities, with over half saying it was the most important factor for choosing to study in the UK.



# Communications

## Top student communication channels



**Email** remains by far the most popular channel for prospective students who want to study in the UK. However, when we look at our global dataset of all 42,000 students, we are seeing that email has decreased in popularity since 2024 - which is mirrored for students interested in the UK.

In its place, in-person communication has tripled in popularity, and instant messaging (such as WhatsApp and Facebook Messenger) has increased from 9% in 2024 to 13% in 2025.



# Application stage

When it comes to the UK students wanting to study abroad, they tend to 'cast the net wider' than domestic students, with nearly two-thirds targeting 3+ institutions in 2025.

Selectivity is increasing among study abroad students: fewer are applying to 5+ institutions, and more are limiting themselves to 1–2.

Domestic students remain conservative in application spread, with most applying to 1–2 institutions and little year-on-year change.

We asked students that wish to study abroad:

***How many applications have you submitted or do you plan to submit?***

	2025	2024
1	18%	15%
2	17%	14%
3	25%	28%
4	11%	11%
5+	29%	32%

## Over half of students take fewer than 6 months to research their study options

### Accessibility of information

With easier access to information, it is no surprise that the majority of prospective students are spending **fewer than six months** researching study options before submitting an application.

Since we began collecting data in 2021, we have been able to track the student application journey becoming progressively shorter. Meanwhile, medium- and long-term research timelines remain stable or slightly down, showing fewer students are taking a year or more to plan.

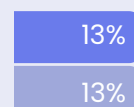
Less than six months before applying



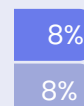
6 to 12 months before applying



12 to 24 months before applying



24 to 48 months or longer



● 2024

● 2025



# Barriers and concerns

## Cost the biggest barriers for students to study in the UK

We asked : What is your biggest obstacle to studying in the UK?

<b>Cost</b> <i>Affordability of fees/ living</i>	<b>81%</b>	+7% in 2025
<b>Eligibility</b> <i>Meeting the school or degree requirements</i>	<b>42%</b>	
<b>Political uncertainty</b> <i>Impact of political attitudes or unrest</i>	<b>27%</b>	+59%
<b>Choice</b> <i>Hard to pick between degrees</i>	<b>21%</b>	
<b>Safety</b> <i>Worried about life at the university / in another country</i>	<b>19%</b>	+23%
<b>Value</b> <i>Not sure of good career/salary outcomes</i>	<b>14%</b>	+17%



“There is a growing perception that the UK is no longer as safe as it perhaps was in the past. Since we can't control these things, we can at least be clear and transparent about what is happening. It is about providing students with the opportunity to make a balanced decision, based on what they believe is right for them. It's about stepping away from the arrogance, and becoming more transparent and honest.”



**Ewan Fairweather**

Postgraduate Recruitment  
Manager, University of  
Edinburgh

From Keystone's webinar: *State of Student Recruitment UK: Opportunities in a Shifting Landscape (September 2025)*



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