



State of Student Recruitment

REPORT 2020



A NEW ERA IN HIGHER EDUCATION

The year 2020 has proved to be one of the most transformational years for higher education. COVID-19, while creating unprecedented global challenges, has dramatically accelerated higher education's move towards online. This is in terms of online content creation and the number of professors now skilled to teach online.

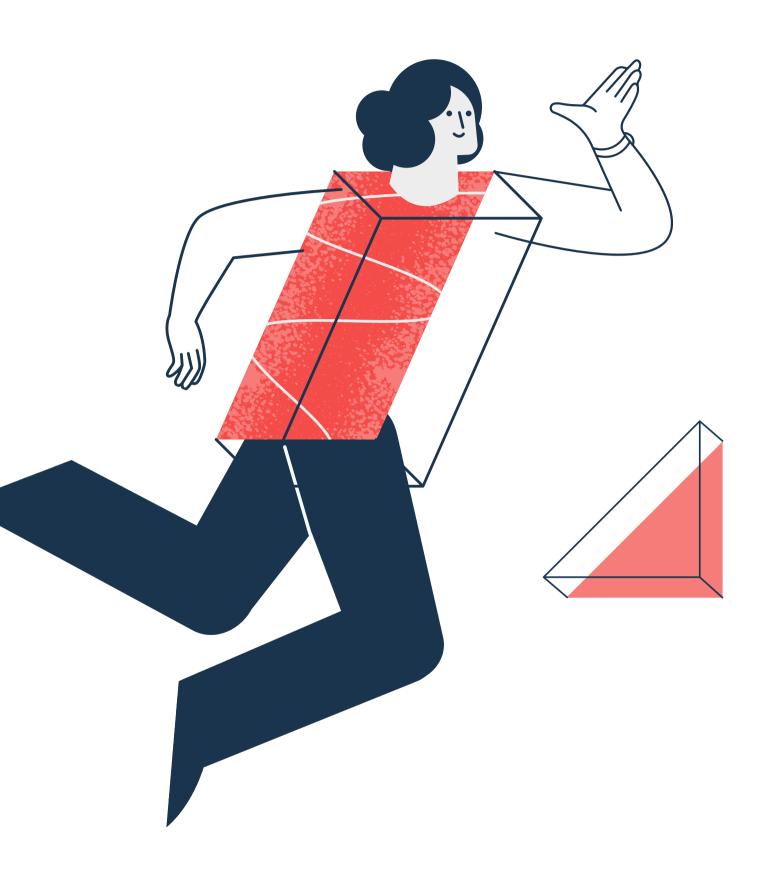
Online opens up new opportunities for universities and students.

Universities can extend their brand and reach new audiences. Students have access to a plethora of newly created online content from leading institutions around the world, without ever having to leave their living rooms.

Amidst global challenges facing us today – a pandemic, climate change and socio-economic unrest, there is no better time for online to move from alternative to mainstream. Nelson Mandela, indeed, was very prophetic when he said education is a powerful weapon you can use to change the world. Let's get started!



ERIK HARRELL, CEO KEYSTONE ACADEMIC SOLUTIONS



State of Student Recruitment 2020

OUTLINE OF TOPICS

- ✓ Page 4: Report Demographics
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- ✓ Page 47: The Rise of Online Education

ABOUT THIS REPORT

All insights shared within this report are prepared for illustrative purposes only and are not intended for use as scientific evidence of causation or behavior.



Student Demographics

OVER 20,000 PROSPECTIVE STUDENTS SURVEYED

21 270 TOTAL RESPONDENTS ACROSS 177 COUNTRIES



TOP TEN COUNTRIES, BY RESPONDENTS

- ✓ United States
- ✓ India
- ✓ France
- ✓ Germany
- ✓ South Africa

- ✓ Spain
- ✓ Italy
- ✓ Nigeria
- ✓ United Kingdom
- ✓ United Arab Emirates

BACKGROUND

The data shared in this report is based on a global survey of 21.270 student visitors using Keystone websites and 811 active users from Keystone higher education partner institutions. All data was collected between August and September 2020.

GENDER

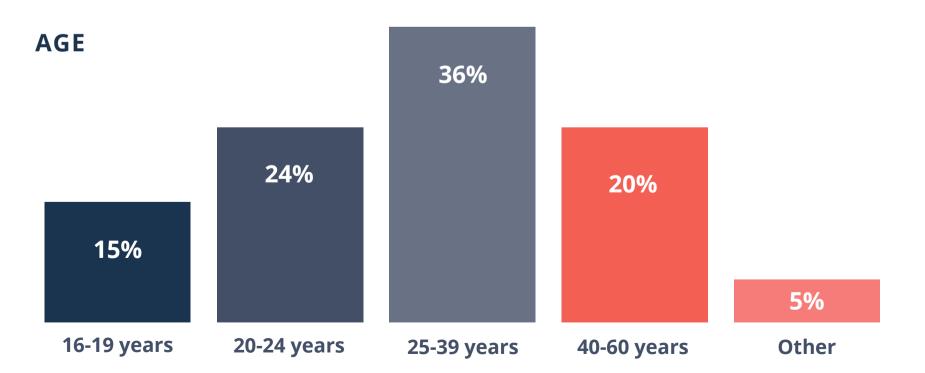
52%

female respondents



48%

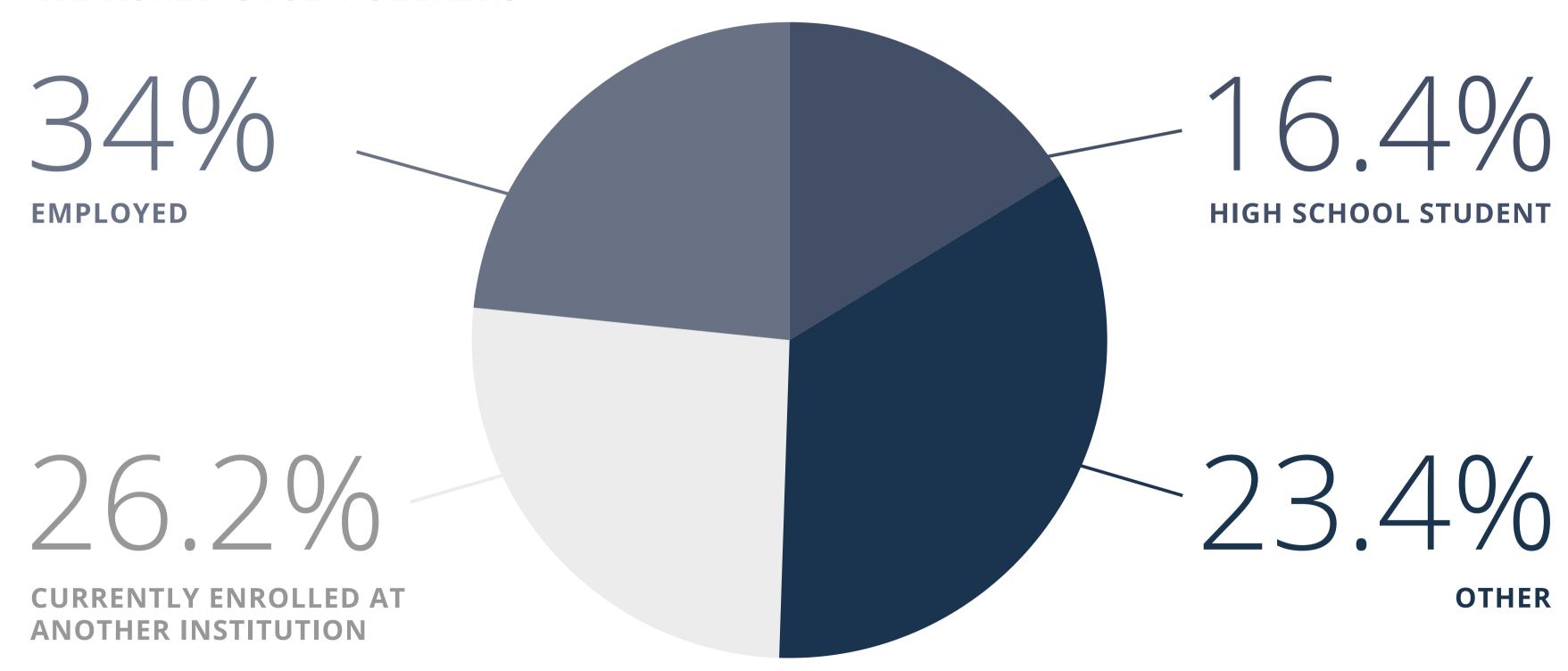
male respondents





WHAT BEST DESCRIBES YOUR CURRENT STATUS?

WE ASKED STUDY SEEKERS

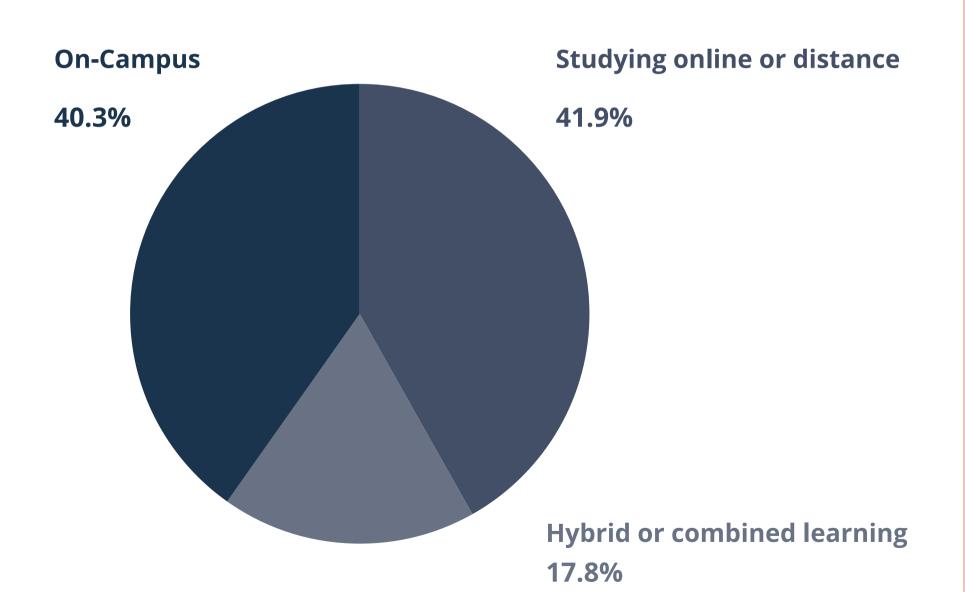




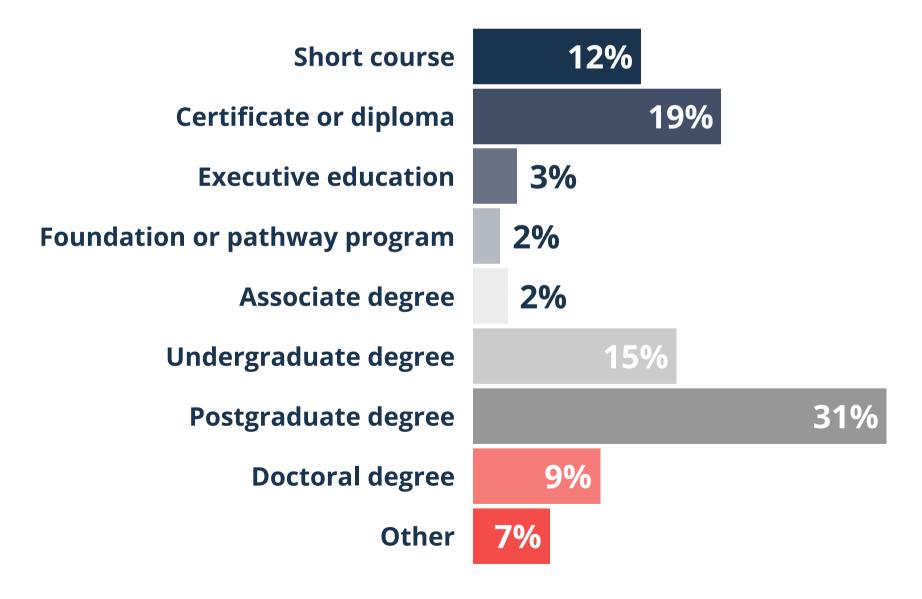
Student Demographics

OVER 20,000 PROSPECTIVE STUDENTS SURVEYED

WHAT TYPE OF STUDY MODE ARE YOU MOST INTERESTED IN?



WHAT TYPE OF STUDY MODE ARE YOU MOST INTERESTED IN?





48%

are the first generation in their family to pursue higher education

35.6%

currently employed and seeking a study program at a university or institution





OVER 800 HIGHER ED PROFESSIONALS SURVEYED

811 RESPONDENTS ACROSS 61 COUNTRIES

TOP TEN COUNTRIES, BY RESPONDENTS

- ✓ United States
- ✓ Spain
- ✓ Canada
- ✓ Hungary
- ✓ Russia

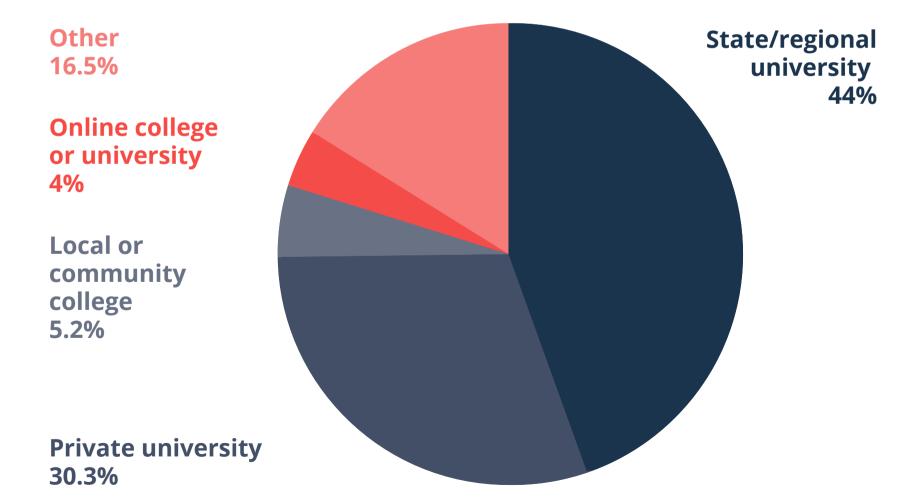
- ✓ Italy
- ✓ United Kingdom
- ✓ France
- ✓ Germany
- ✓ Netherlands



BACKGROUND

The data shared in this report is based on a global survey of 21 270 student visitors using Keystone websites and 811 active users from Keystone higher education partner institutions. All data was collected between August and September 2020.

WHAT TYPE OF INSTITUTION DO YOU REPRESENT?



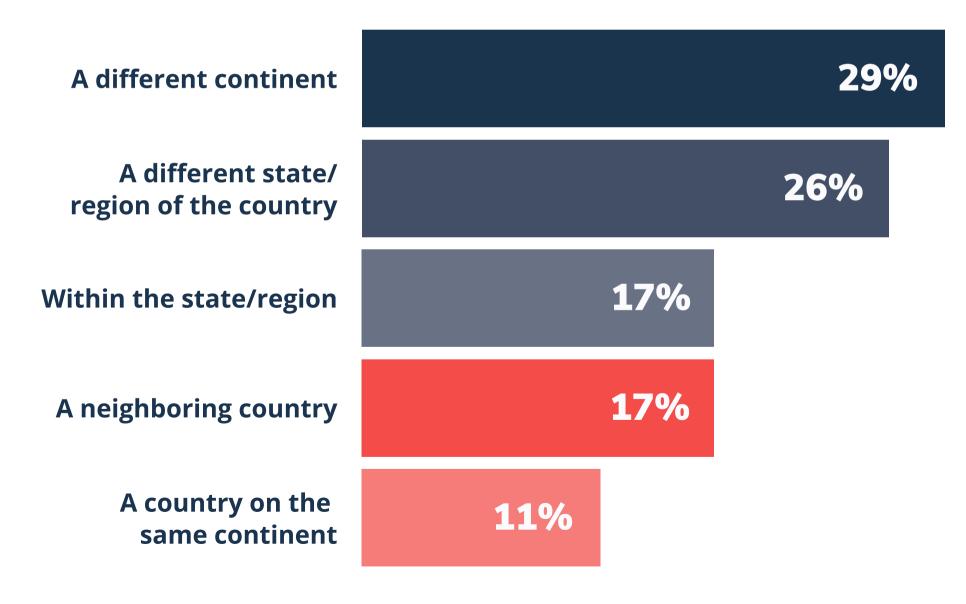


OVER 800 HIGHER ED PROFESSIONALS SURVEYED

WHAT IS YOUR JOB TITLE?

- Dean
- University administrator
- Program coordinator
- Promotional officer
- Director of admissions
- Marketing officer
- International office

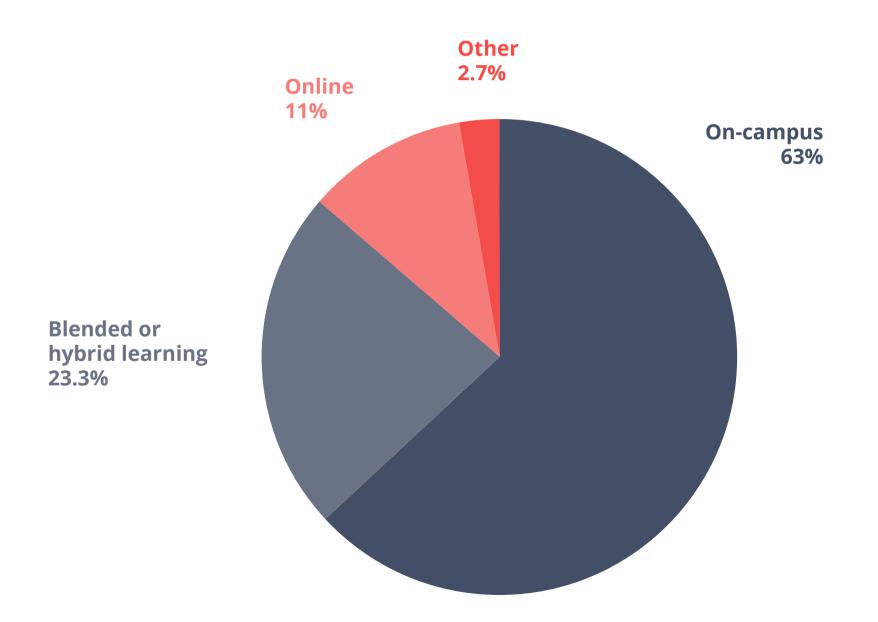
MOST STUDENTS AT MY INSTITUTION COME FROM...



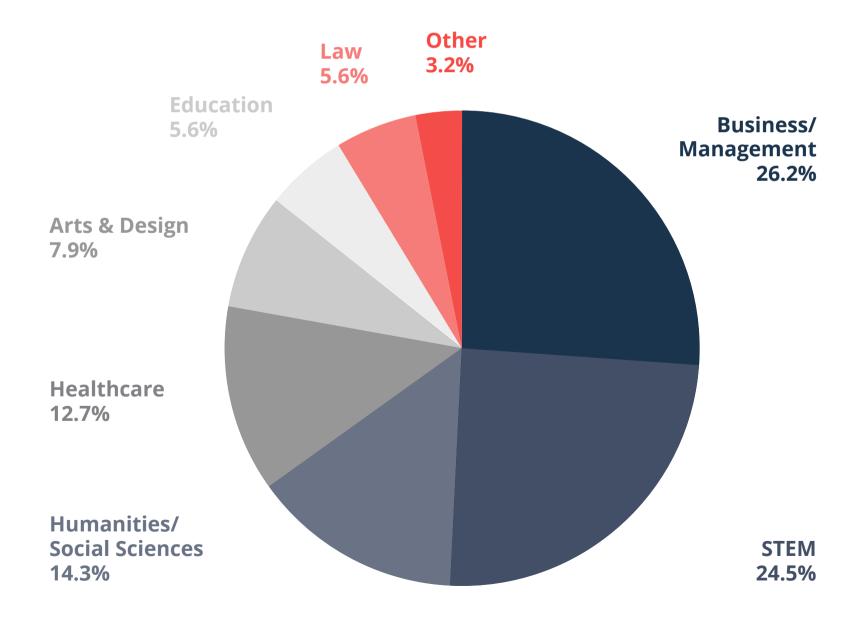


OVER 800 HIGHER ED PROFESSIONALS SURVEYED

MOST POPULAR STUDY MODE AT MY INSTITUTION



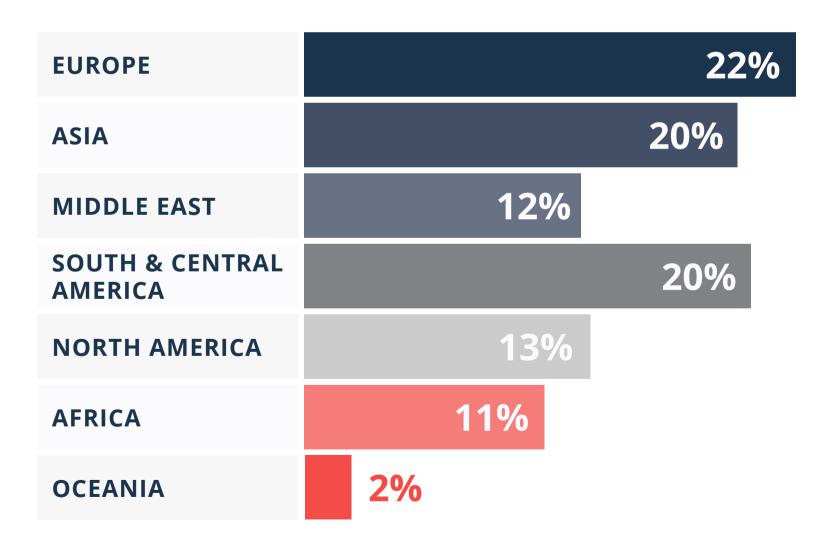
MOST POPULAR PROGRAM AT MY INSTITUTION



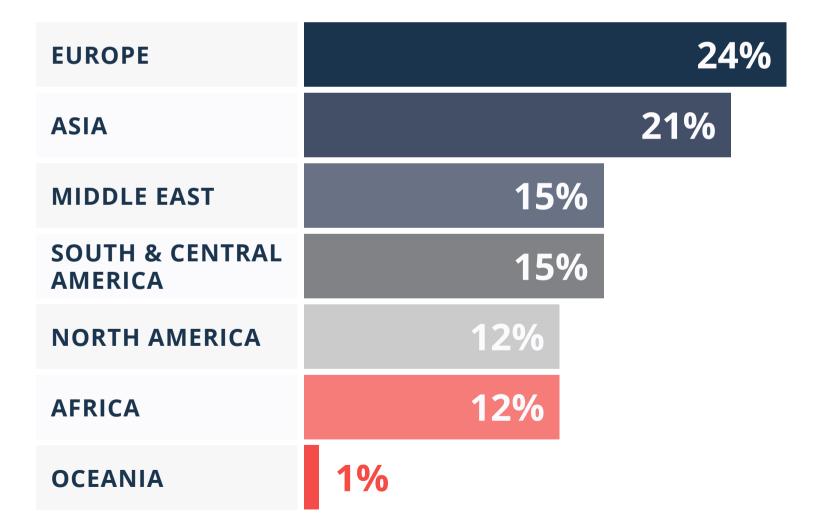


OVER 800 HIGHER ED PROFESSIONALS SURVEYED

WE SPEND MOST OF OUR INTERNATIONAL RECRUITMENT EFFORTS PROMOTING TO STUDENTS FROM:



MY INSTITUTION HAS THE MOST SUCCESS RECRUITING STUDENTS FROM:





Evolution of the Student Journey



The Student Journey Discovery & Research

HOW DID YOU DISCOVER YOUR POTENTIAL INSTITUTION?

The student journey often starts long before students connect with your institution. Education is an important decision and students spend considerable time evaluating, researching and shortlisting study programs. It is important for university programs to be visible in the right channels with accurate and updated information about their study programs. We share insights in further detail here.

PROMOTE YOUR PROGRAMS WITH KEYSTONE

Keystone aims to connect students and higher ed institutions with 420 global domains ranking highly across all major search engines including Google, Baidu and Yandex. We offer your institutions a unified global platform for promotion of your study programs.

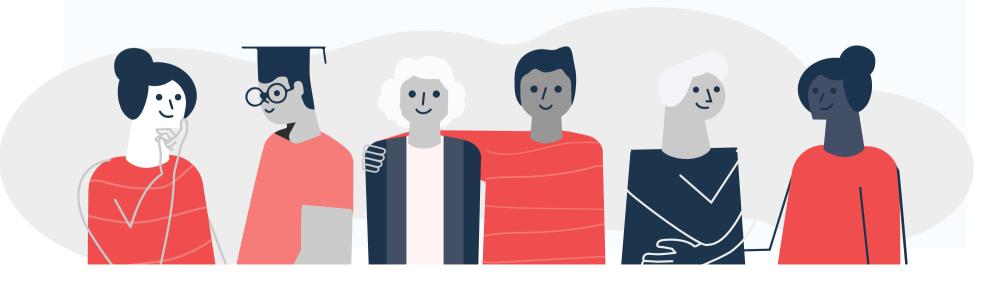
MULTI-LINGUAL PROMOTION

Our multilingual websites are optimized in 33 languages, ensuring that when students are searching for a study program, they will find your institution, no matter the language they use to search.

Visit keystoneacademic.com for more information.

30%

of students began their research at least 7 - 24 months before application.







Research & Discovery

HOW DID YOU FIRST HEAR ABOUT YOUR DESIRED PROGRAM OR INSTITUTION?

23%

21%

16%

11%

FROM AN EMAIL

ONLINE SEARCH (ETC. GOOGLE, BAIDU, YANDEX)

SOCIAL MEDIA

FROM NETWORK (ALUMNI, FAMILY, ADVISOR)

8%

STUDENT SEARCH PLATFORM (I.E MASTERSTUDIES.COM OR BACHELORSTUDIES.COM) 7%

ONLINE ADVERTISING

4%

UNIVERSITY & CAREERS FAIR

10%

OTHER



Research & Discovery

18% STUDENT PREFERENCES 13% 12% 12% 11% 10% *(Other 1%) 8% 7% Speak with Read article Speak with Visit Take a virtual Online Watch a View Attend a online



or summer

program

testimonials

from alumni

campus tour

campus

research (i.e

search engine)

students attending

the same program

or institution

or brochure

video

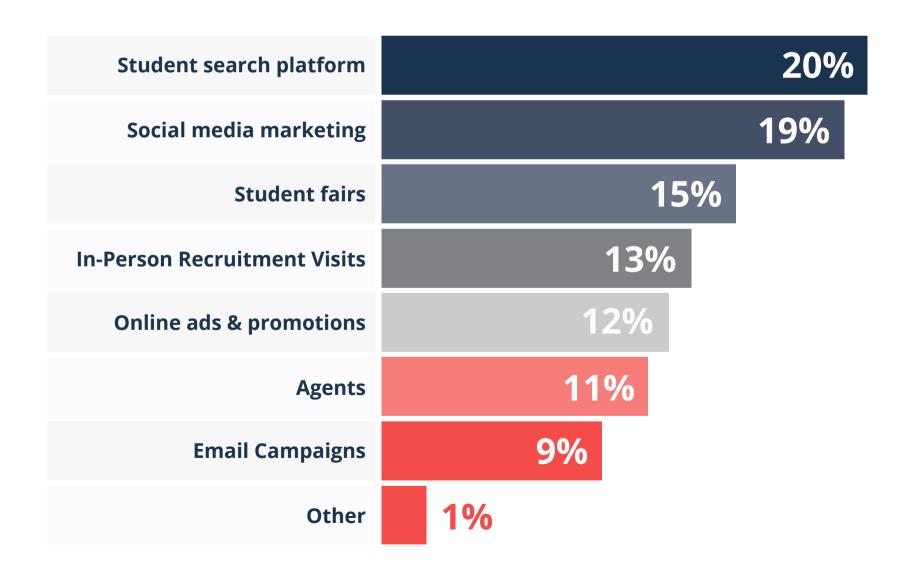
admissions

counsellor

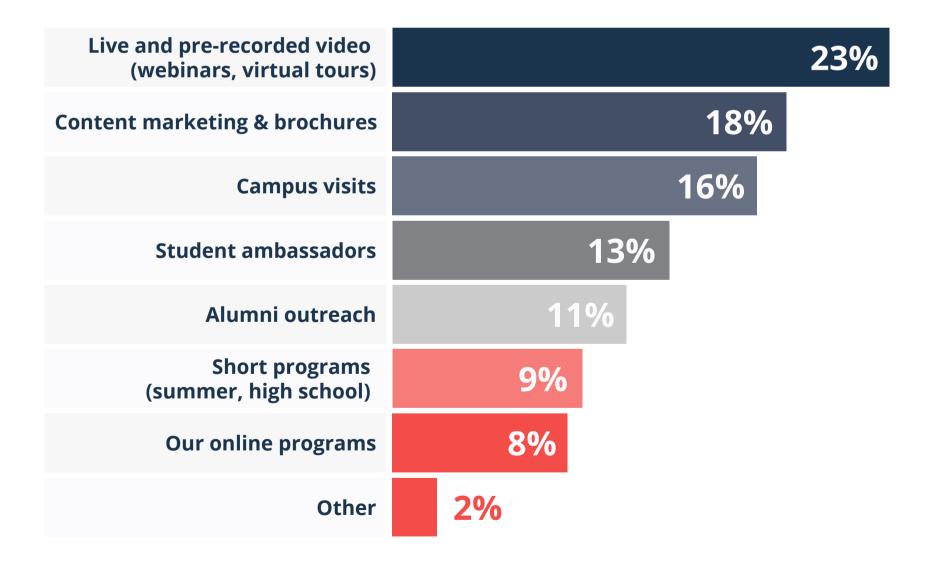
The Student Journey

We Asked Institutions about Student Outreach...

MOST SUCESSFUL OUTREACH METHODS



ADDITIONAL STUDENT OUTREACH METHODS





The Student Journey Social Media Use

WHICH SOCIAL MEDIA PLATFORM DO STUDENTS USE THE MOST?





















#1 Facebook (31%)

#2 Instagram (21%) #3 Youtube (18%)

#4 Other (12%) #5 LinkedIn (11%) #6 Twitter (4%) #7 Wechat (1%) #8 Snapchat (1%) #9 Tiktok (0.5%) #10 Vk (0.5%)

HOW DO THEY WANT TO BE CONTACTED?

3%

prefer social media when being contacted by a potential institution (when compared to other methods of communication).

72%

prefer to be contacted on Facebook if an institution is trying to reach them on a social media platform.



HOW ACTIVE ARE HIGHER ED INSTITUTIONS ON SOCIAL MEDIA?

29%

of institutions surveyed have an active presence on Facebook, followed by Instagram (24%), Youtube (21%) and Twitter (16%)

7%

agree with the statement that they are "highly responsive" on social media





The Student Journey Student Communication Preferences

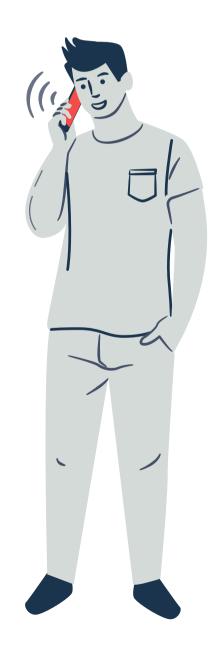
THE RESULTS AREN'T WHAT YOU THINK

Social media platforms have always been popular within the student community, given the rise of Instagram Reels, TikTok, Youtube etc. However, when it comes to communication with institutions, email still remains a preferred choice among students.



72%

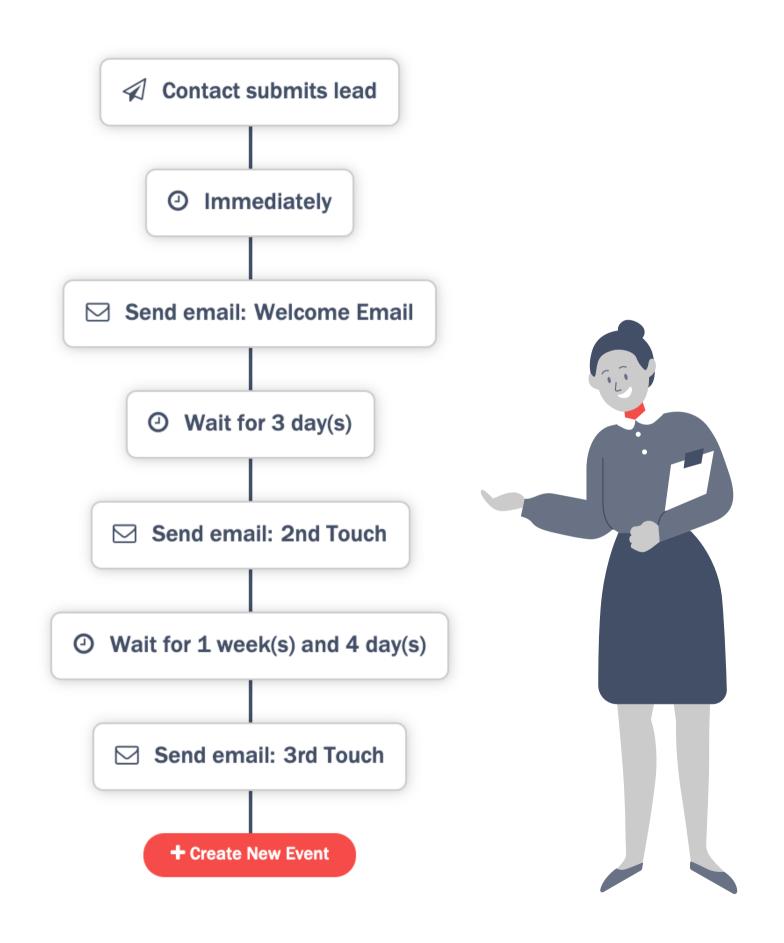
of potential students prefer to be contacted by email when hearing from a prospective institution.



I PREFER TO BE CONTACTED BY...

#1 Email
#2 Phone call
#3 SMS/Text
#4 Social Media
#5 Video chat





Introducing Workflows

We've created a brand new solution to help make your email nurturing even better! With Workflows, you can:

- Create email templates with our easy-to-use builder.
- Use time-based workflows to send emails to students automatically at any time you wish!
- Nurture students through all stages, from initial interest to application.

To learn more, ask us about SmartHub Pro!



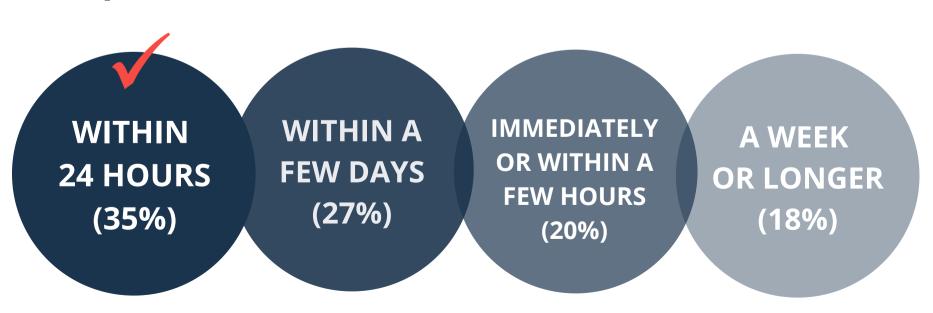


The Student Journey Speed of Communication

Many students seeking higher education today are digital natives, using to having access to information at a click of a button. As such, not only quality but speed of response is perhaps something institutions should consider when communicating with the next generation of students.

WE ASKED STUDENTS

HOW QUICKLY DO YOU EXPECT TO RECEIVE A RESPONSE FROM A POTENTIAL INSTITUTION?



75%



of university administrators surveyed said their institution would usually respond to a prospective student inquiry within 24 hours.



The Student Journey Questions Frequently Asked By Students



HANDLING STUDENT INQUIRIES

Communicating with potential students is an essential part of recruitment, but going one step further and actively nurturing them is likely to significantly increase engagement and interest in your programs. To help, we share the top questions our student respondents want answered during initial stages of inquiry.

24 HOUR STUDENT COMMUNICATION

At Keystone, we offer marketing automation software which will help your team send answers to student inquiries as soon as they arrive. Supporting over 17 languages, our SmartHub Engage tool will work across time zones, answering incoming questions 24 hours a day.

ADD A PERSONAL TOUCH!

Our tools go one step further and allow your team to include personalization to your messaging, adding that personal touch to your student communication!

Visit keystoneacademic.com/engage for more info.

WE ASKED STUDENTS...

WHEN RESEARCHING STUDY OPTIONS, THE MOST IMPORTANT QUESTION IS....

39%

How much does this program cost?

9%

When are the application deadlines?

23%

Am I eligible for this program?

8%

Are there any entrance tests or scores required?

18%

Are scholarships or funding available?

3%

Other



WHAT STUDENTS SAY



had a neutral response to the statement that institutions are "highly responsive" when replying to student inquiries.



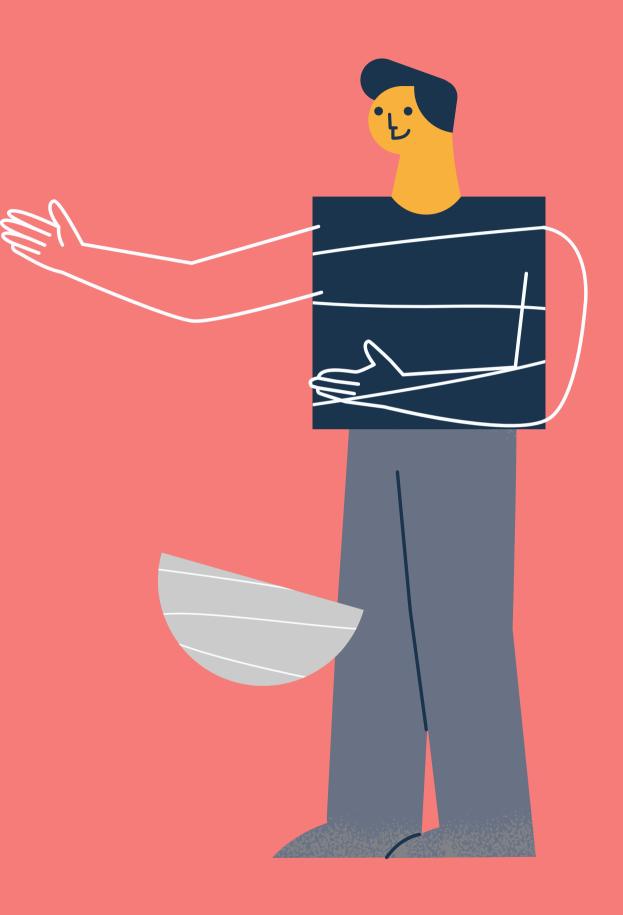
WHAT INSTITUTIONS SAY

said most of their prospective student inquiries came from email, followed by contact on their website (17%).





Student Motivations & Preferences



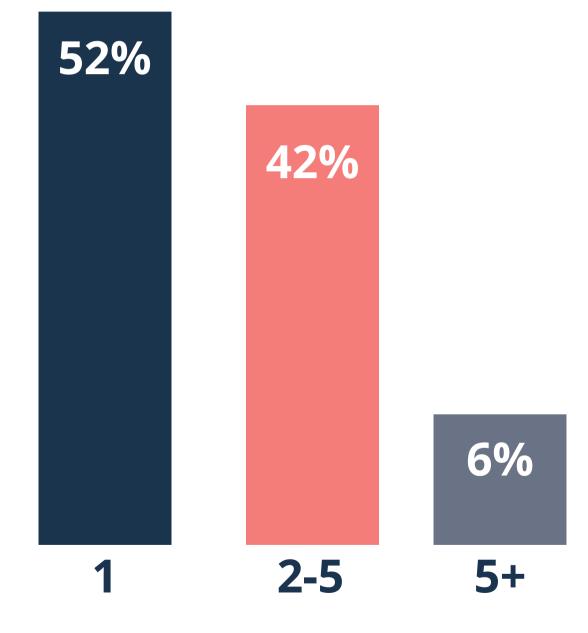
WE ASKED STUDENTS

How many programs or degrees will you apply to?

TOP DESIRED FIELDS OF STUDY

| Business, Management & Economics | 34% |
|----------------------------------|-----|
| Arts & Design | 18% |
| Social Sciences & Humanities | 12% |
| Healthcare | 10% |
| Education | 10% |
| Tourism & Hospitality | 5% |
| Law | 5% |
| STEM* | 3% |
| Other | 3% |

^{*}Science, Technology Engineering and/or Mathematics

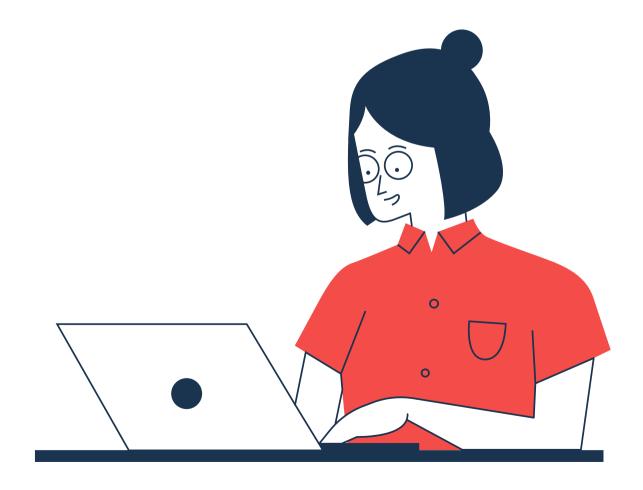


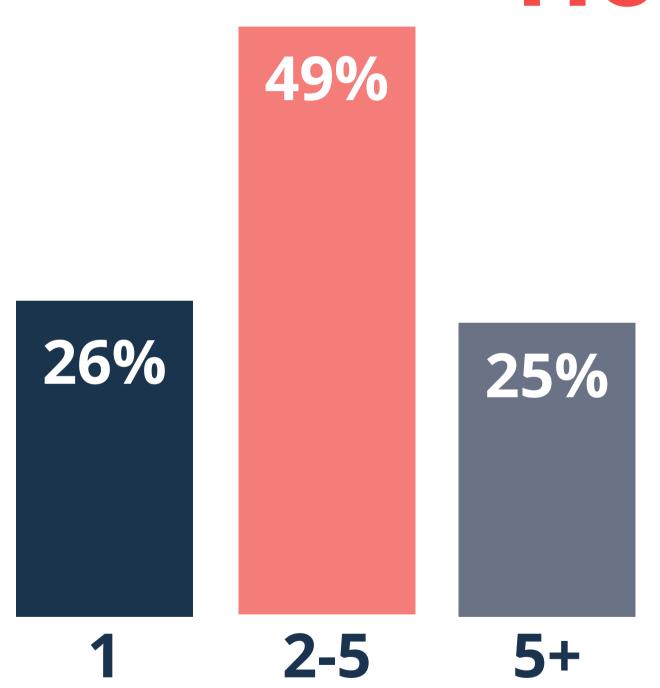
Number of programs or degrees



How many institutions will you apply to?

WE ASKED STUDENTS



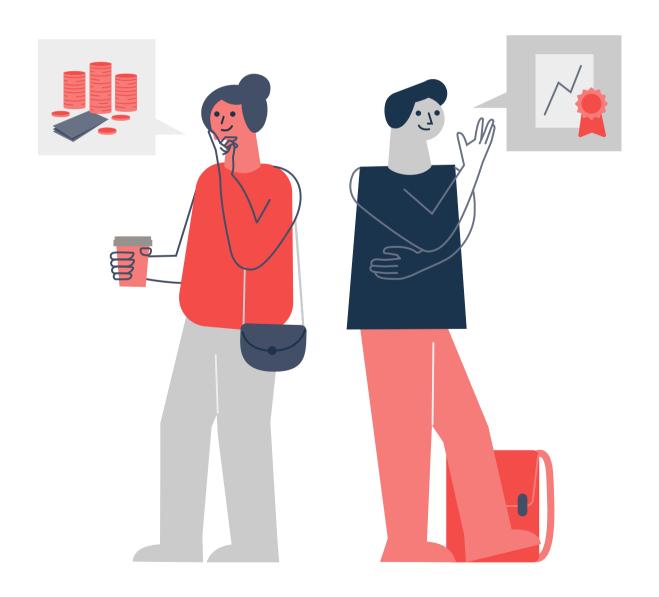


Number of institutions



The Student Journey Study Preferences

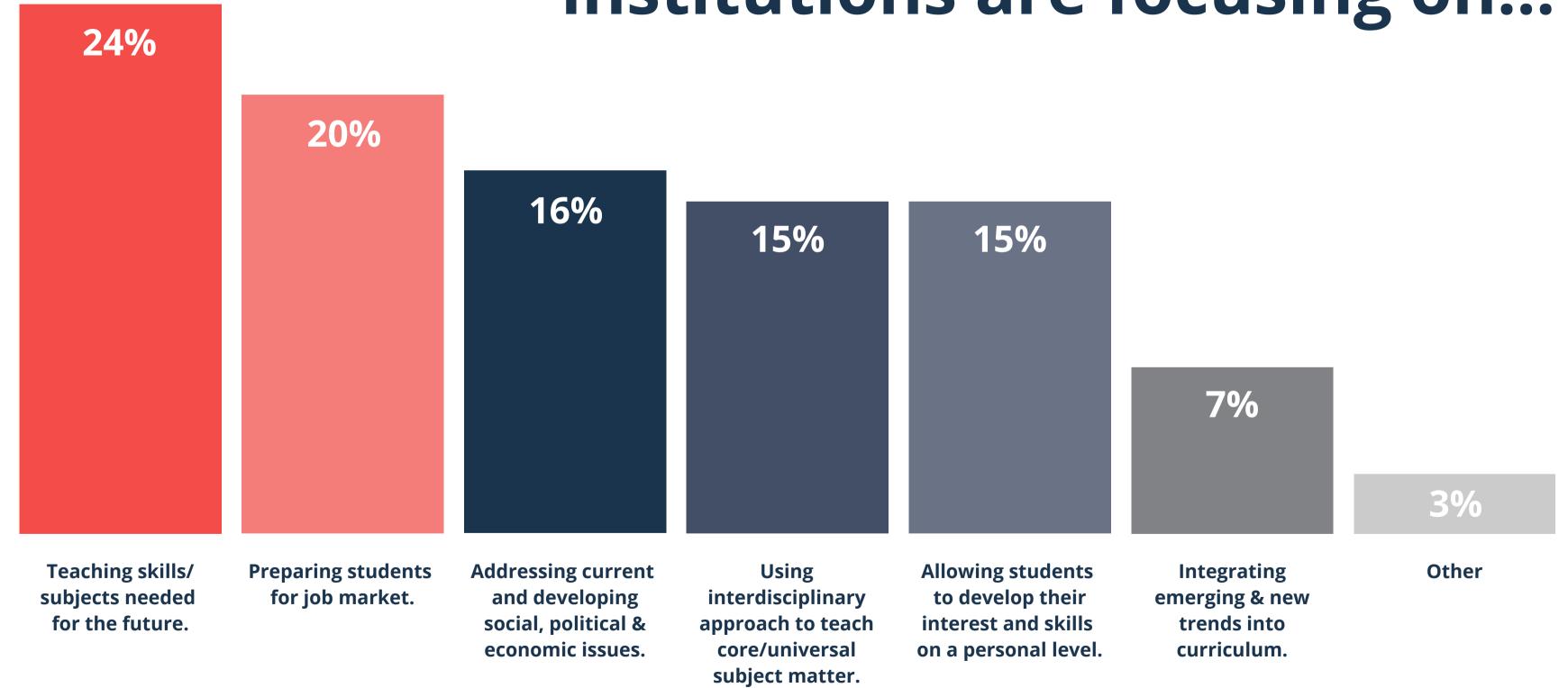
I WANT TO EARN A DEGREE IN A FIELD THAT....



| I FIND PERSONALLY INTERESTING | 15.8% |
|---|-------|
| IN WHICH I KNOW I CAN PERFORM WELL | 15.6% |
| WILL LEAD TO A "MEANINGFUL" CAREER OR SENSE OF ACCOMPLISHMENT | 14.2% |
| WILL ALLOW ME TO GIVE BACK TO SOCIETY OR MY LOCAL COMMUNITY | 12.5% |
| WILL INCREASE MY FUTURE EARNING POTENTIAL | 11.2% |
| PROVIDES LEADERSHIP DEVELOPMENT & TRAINING | 10.7% |
| WILL ALLOW ME TO WORK IN ANOTHER COUNTRY | 9.9% |
| IS PERSONALLY CHALLENGING AND REWARDING | 9.6% |
| OTHER | 0.5% |



When developing new programs, institutions are focusing on...



The Student Journey Funding & Tuition

THE COST OF HIGHER EDUCATION

It appears many prospective students believe tuition fees are too expensive — and, not surprisingly, a very similar number (39%) seek out financial assistance to help pay for tuition.

As economic uncertainty rises around the world due to the COVID-19 pandemic, the need for assistance may very well increase in the coming months and years to come, as the next set of data illustrates.



THE STUDENT PERSPECTIVE

40%

believe the tuition fees are too expensive and should be reduced

WE ASKED INSTITUTIONS

38%

of university admins agreed that a large proportion of students at their institution used a form of financial assistance 26%

said their institutions offer "a wide variety of grants and scholarships" 19%

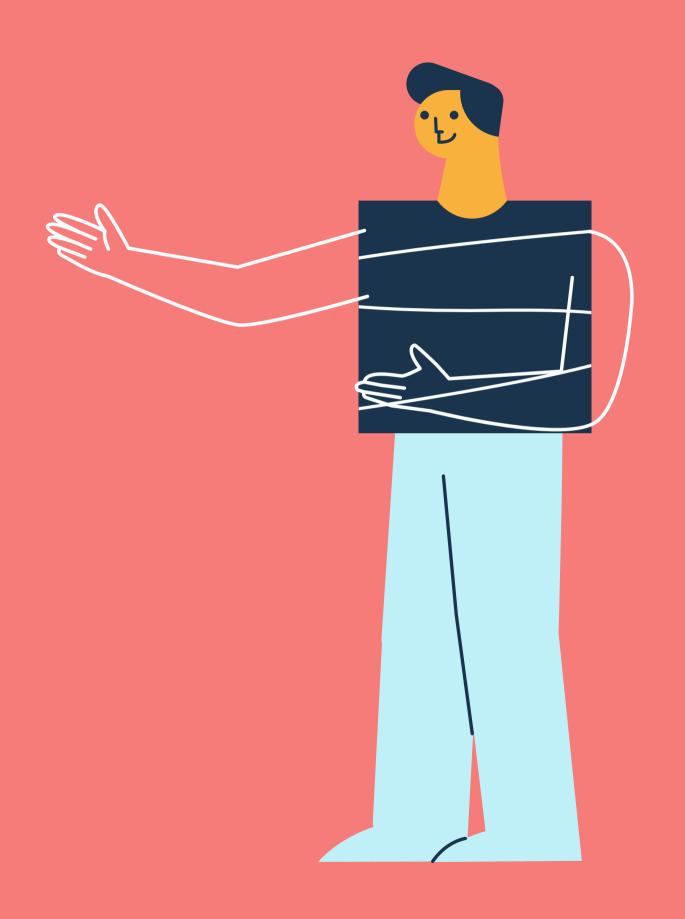
subsidize tuition based on merit or financial circumstances 39%

will seek out a source of financial assistance to help pay for tuition



40% of students are concerned about the cost oftuition

Students needing scholarships may increase due to economic uncertainty in the wake of the 2020 pandemic.



WHAT WOULD STUDENTS PAY HIGHER TUITION FOR?

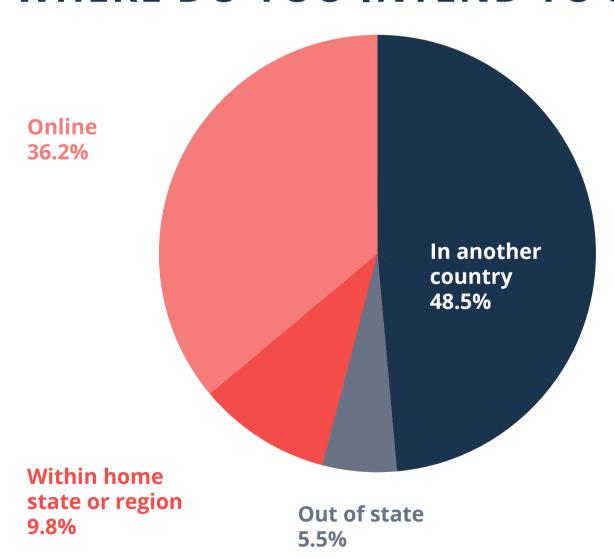


#1 greater flexibility to work and study
#2 enhanced career outcomes
#3 increased future earning potential
#4 attendance at a prestigious
institution



The Student Journey Study Location

WHERE DO YOU INTEND TO STUDY?



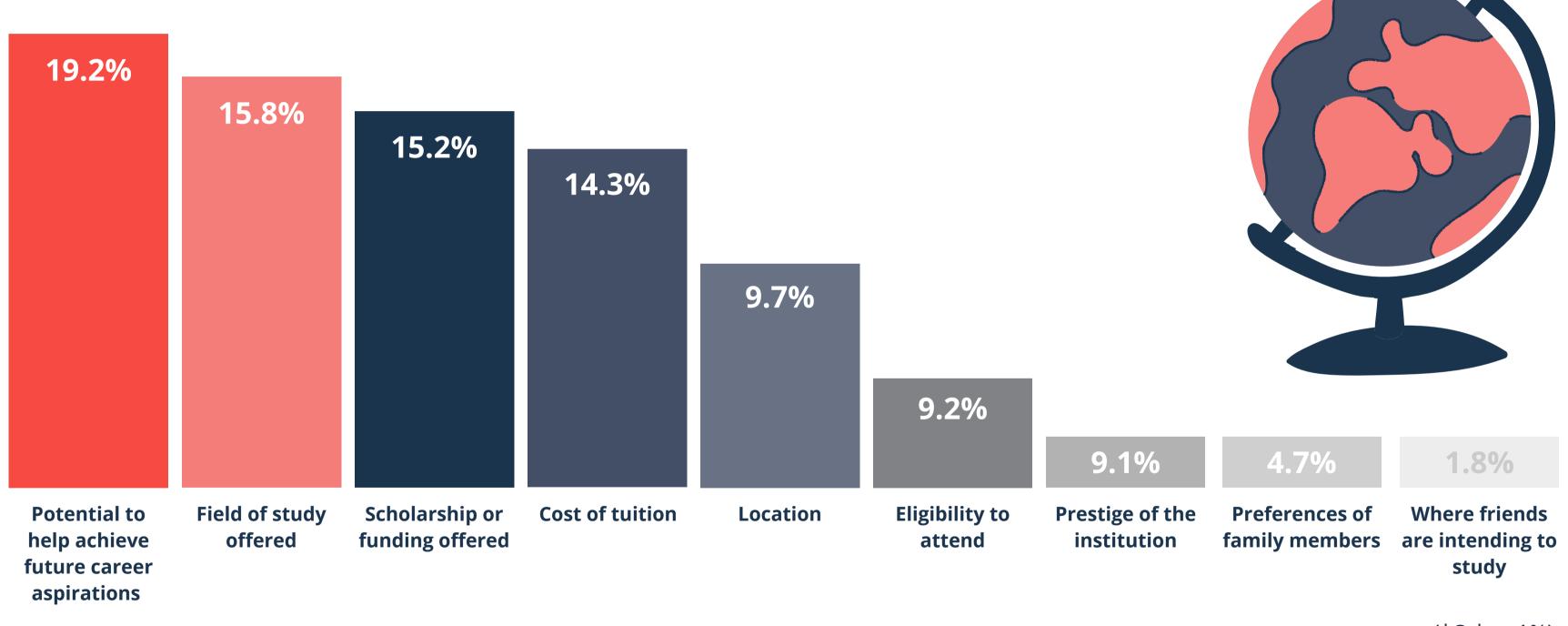
48.5%

of students surveyed intend to study abroad





TOP 10 MOTIVATIONS FOR CHOOSING WHERE TO STUDY...



(*Other 1%)



The Student Journey

From those interested in studying abroad

WHY DO YOU WANT TO STUDY ABROAD?

- **1.** It will provide career opportunities my home country cannot (25%)
- **2.** To stay and work in the country after graduation (17%)
- **3.** To gain international experience (15%)
- **4.** To travel while i study (12%)
- **5.** To study in a degree/field not available in home country (10%)
- **6.** To learn a new language (7%)
- **7.** Program entry is less competitive/has lower entry requirements than in home country (4%)
- **8.** Less expensive (3%)
- **9.** Other (7%)

TOP CONCERNS ABOUT STUDYING ABROAD IN 2020

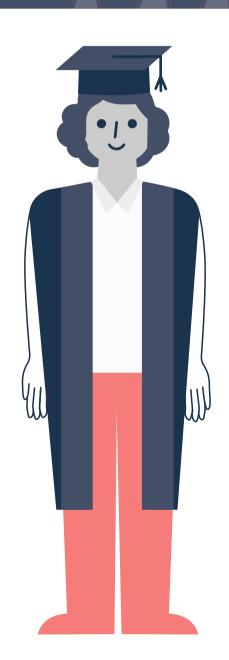
Cost of tuition
Learning new language
Away from friends & family
Culture shock

Feeling unqualified

Lack of recognition for degree in home country



The Student Journey Career Outcomes



JOB MARKET SUCCESS IS IMPORTANT

Today's students are focused on being career-ready, wanting to be prepared for life after graduation. We share insights into top success factors and highlight the key drivers behind student aspirations for study and career. From our data, it appears social factors and creativity are increasingly important to today's students.

WE ASKED INSTITUTIONS...

What are most common success factors reported by alumni?

- ✓ Transferrable skills within job market (28%)
- ✓ High job satisfaction (27%)
- ✓ Leadership opportunities (15%)
- ✓ High salaries (14%)
- ✓ Job security (10%)
- ✓ Other (6%)

WE ASKED STUDENTS...

Which factor do you believe will have the greatest influence on achieving your intended career goals?

Level of qualification chosen (50%)

Field of study chosen (33%)

Reputation of institution (12%) (5%)



The Student Journey Career Outcomes

MY FUTURE CAREER WILL...

HAVE A POSITIVE IMPACT ON THE ENVIRONMENT OR COMMUNITY 22%



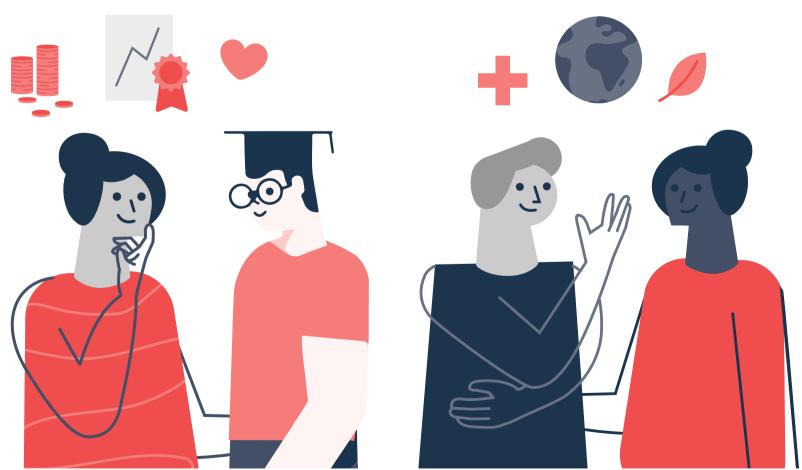
ALLOW FOR A HEALTHY WORK/LIFE BALANCE 15%

LET ME EXPRESS MY CREATIVITY 14%

LEAD TO A POSITION OF LEADERSHIP OR EXPERTISE 14%

HAVE HIGH EARNING POTENTIAL 13%

OTHER 1%



The Impact of COVID-19 on Higher Education

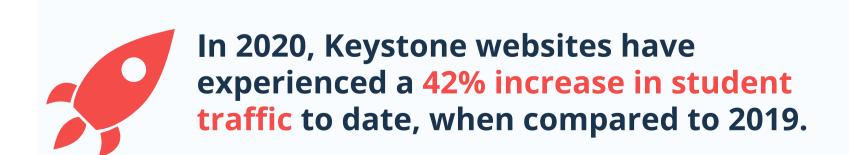


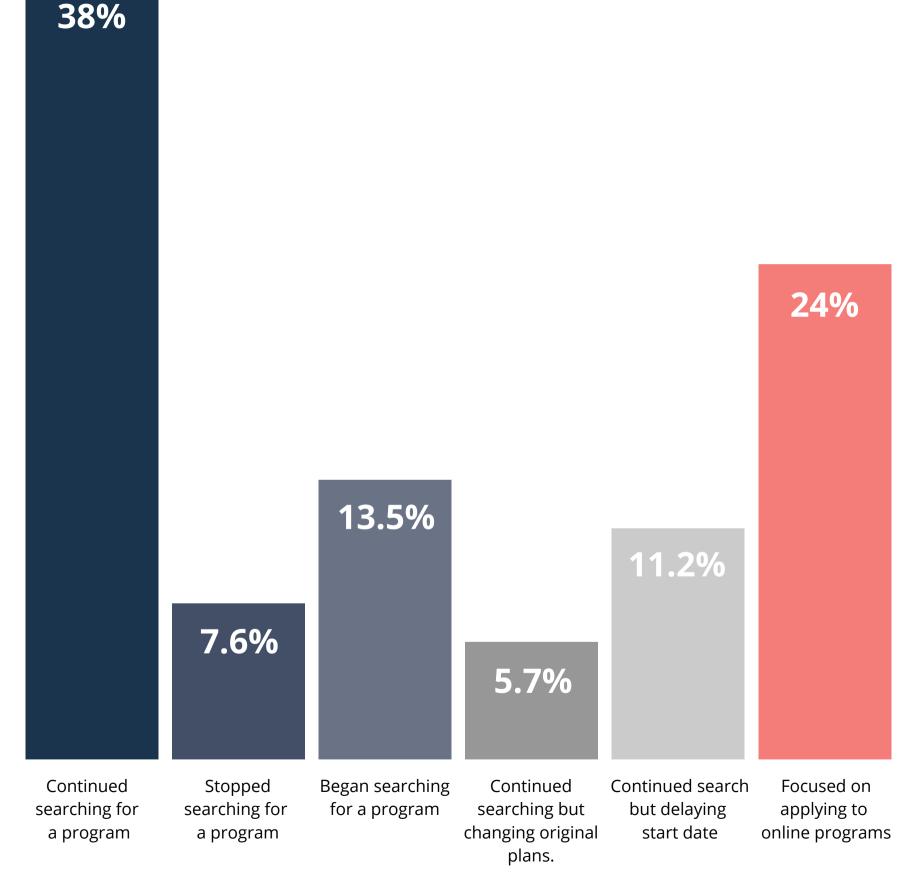
How has COVID-19 impacted student search?

Good news! COVID has not deterred people from searching and applying for higher education.

A majority of the students have 'continued searching for a program or began searching for a program.

It is reassuring to see in these challenging times, only 7.6% of those surveyed have stopped searching for a program.







74% of students remain dedicated to their intended field of study prior to COVID-19.





Impact of COVID-19

Students Seeking Study Since COVID-19



The COVID-19 pandemic has not only had a significant impact on higher ed, but throughout the world. As society reacts to such global disruption, many who were perhaps not interested in seeking education prior to the pandemic may now be contemplating significant life changes.

In the survey, 13.5% respondents cited that they had only begun seeking study after the COVID-19 pandemic hit.

For these respondents, we asked why they started seeking study after COVID-19.

WHY ARE STUDENTS SEEKING STUDY SINCE COVID-19

29.5%

due to lack of security in their current role, job market or because they were recently unemployed. 20.8%

are seeking study because they want to change their career path since COVID-19.







20% of students have cancelled plans to study abroad since COVID-19

Impact of COVID-19 Study Preferences

TOP THREE FIELDS STUDENTS ARE CHANGING TO OR CONSIDERING SINCE COVID-19

#1 Business & Management

#2 Healthcare

#3 Law



26%

are changing or considering changing their field of study since COVID-19





of students surveyed said COVID-19 has reduced their ability to pay for their studies.



Impact of COVID-19 on Institutions

OVER 800 HIGHER ED PROFESSIONALS SURVEYED

WE SURVEYED HIGHER EDUCATION PROFESSIONALS ABOUT THEIR EXPERIENCES SINCE COVID-19

21%

experienced an increase in enrollment numbers

37%

experienced a decrease in enrollment numbers



40%

of institutions had increased their online program offerings since COVID-19

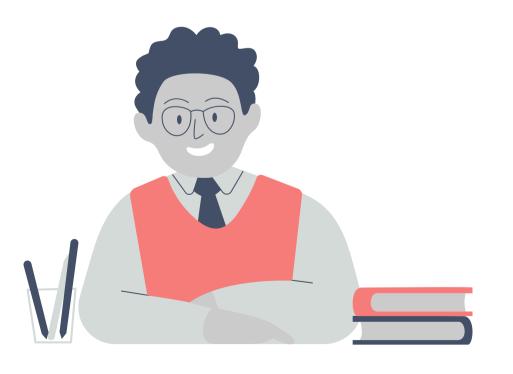
29%

of institutions are rethinking their online education strategy since COVID-19.



Evaluating the pandemic switch to online teaching & learning

How was the transition?



CURRENT STUDENTS

49%

agree that the quality of teaching was of the same standard as in-classroom teaching after the switch to online during the pandemic.

60%

consider the quality of online teaching to be the same as on-campus teaching.

HIGHER ED PROFESSIONALS

78%

agree that their institution has provided staff with necessary training and support to effectively teach online during the pandemic.

77%

agree that their institution has adequate technical resources and infrastructure to allow them to teach campus programs online during the pandemic.





The Rise of Online Education



Online Education Study Preferences

COVID-19 has made virtual learning the norm, with millions around the world working and studying from home in 2020. Needless to say, this has accelerated the expansion of online learning, not just in terms of students taking classes online but making them more familiar with online education as a mainstream choice for full-time study.

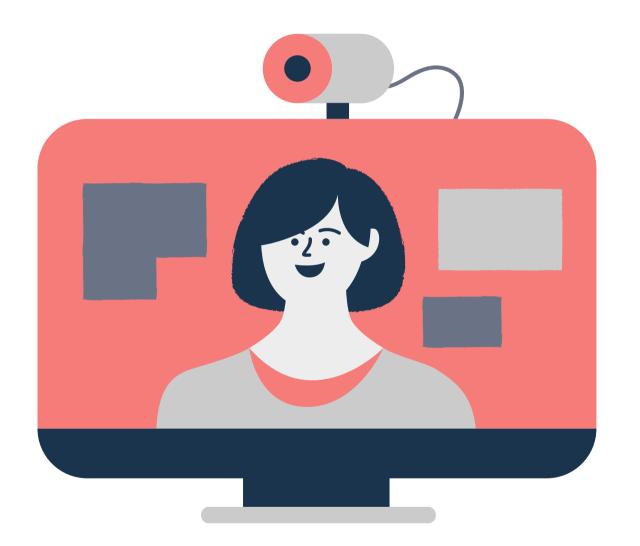
While progress still remains for development of the online education sector, it appears to be well on its way towards transformation from alternative option to viable study choice for students across the world.

WE ASKED STUDENTS...

43%

feel that a degree program offered online is of the same standard as a program offered on-campus or in-person. 49%

believe tuition fees for online degrees should cost less than for on-campus degrees.





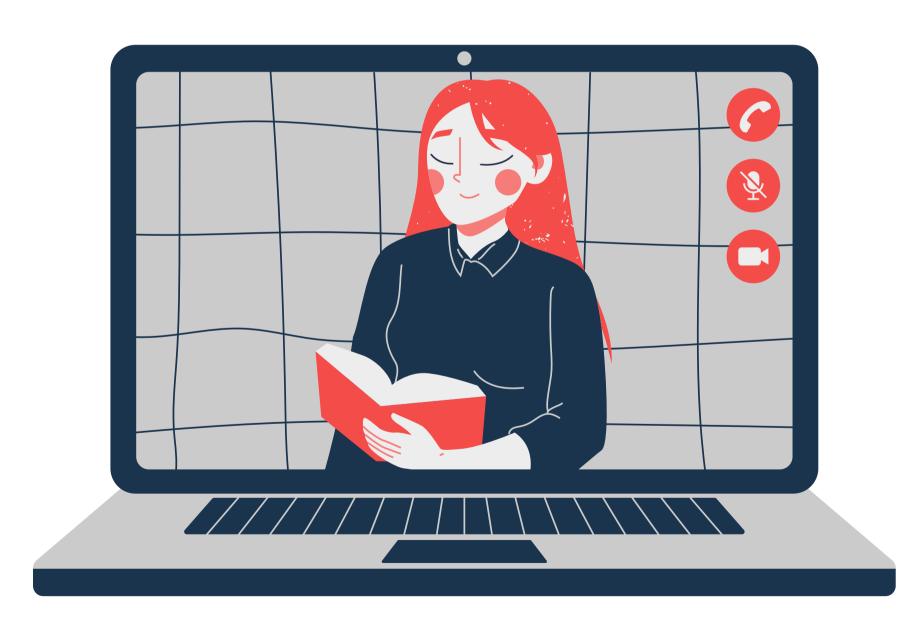
Online Education We asked students...

55%

said the COVID-19 pandemic had changed their opinions about online education

60%

said if the pandemic continues, they will enroll in the same program if offered online





OVER 800 HIGHER ED PROFESSIONALS SURVEYED

Online Education

We asked university administrators...

IN MY OPINION MY INSTITUTION'S ONLINE PROGRAMS ARE

IN MY OPINION, MOST STUDENTS WHO ENROLL IN ONLINE PROGRAMS AT MY INSTITUTION:

33%

35%

as popular as campus-based programs

live in another city/state/country

27%

22%

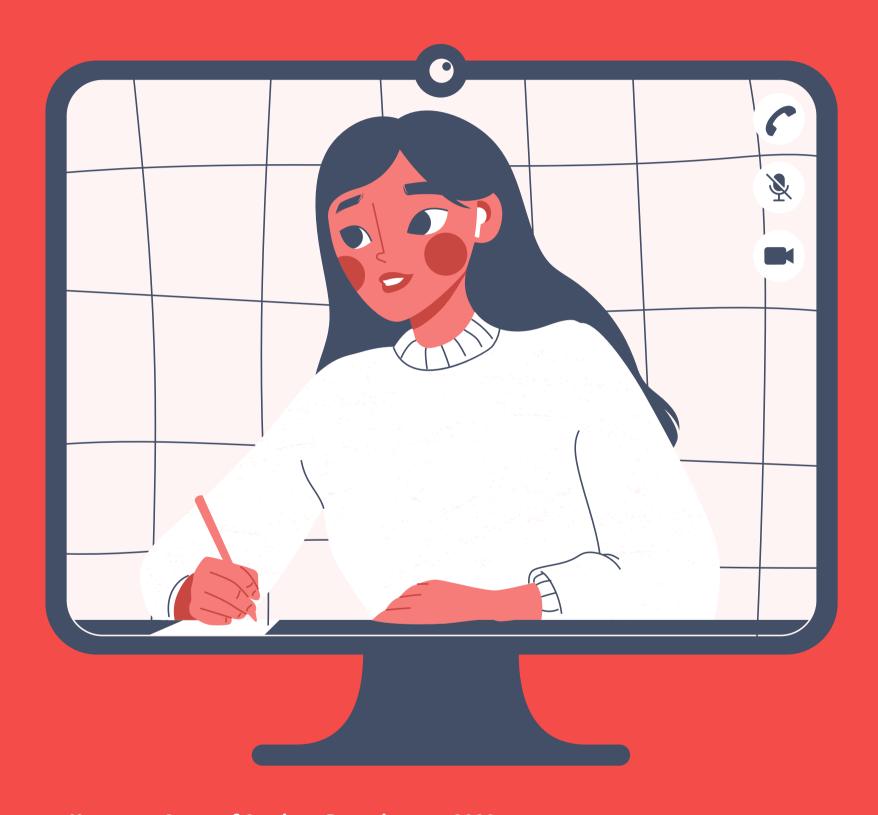
are less popular than campus-based programs

don't have time to attend classes on-campus

440/0

of students surveyed agree with the statement that degrees earned online have the same value as degrees earned on campus.





40% of institutions are expanding online or blended program offerings.

Most common online education challenges

integrating skills practical learning new material development Staff training competing with in-person experience marketing costs translation from campus programs lack of infrastructure targeting age groups planning for professors lack of capacity unfamiliarity time zone differences planning development replicating success campus programs adapting curriculum finding target markets competition staff boarding accreditation issues marketing programs market situation right prospects lack of resources





About Keystone Academic Solutions

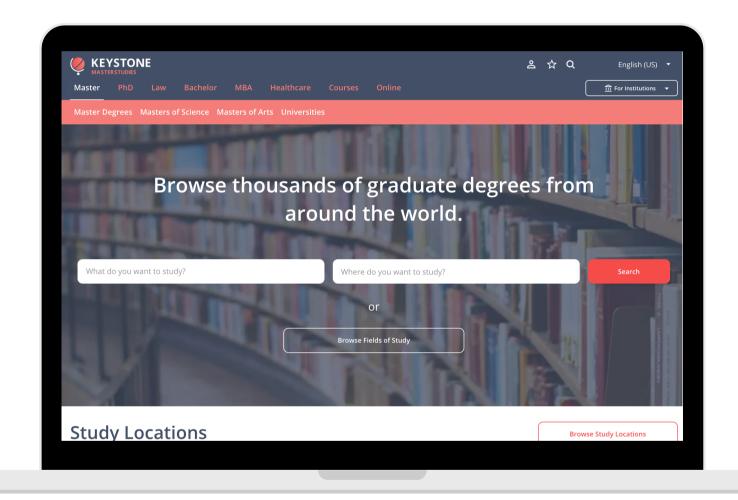
CONNECTING STUDENTS AND HIGHER ED

Keystone Academic Solutions helps higher education institutions digitalize and innovate their student marketing and recruitment. With 1500+ partner institutions, our primary goal is to connect students and institutions on a global scale, acting both as a partner and trusted education resource.

Reaching over six million students each month in 33 languages, Keystone the driving force behind some of the world's most popular student search websites, including Onlinestudies and Masterstudies. We make sure that students can access study information from wherever they are in the world.

We have a wealth of experience from across the world and have grown to an international team of over 90 employees in Oslo, Norway, representing over 40 nations. To learn more, get in touch at www.keystoneacademic.com





Want to know more about Keystone?



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