



State of Student Recruitment

EUROPE

- Is Europe a target market for your international student recruitment? Our findings can help you update your understanding of how students from this region are thinking about study abroad and making decisions in 2022 and beyond.

Report Highlights

Europe

■ Our Global Student Survey reached 2,111 prospective students across Europe and more than 20,000 students from around the world overall. View respondent data and customize country groupings with our State of Student Recruitment Dashboard to find out more about specific regions or countries.



Germany and Spain become the 3rd and 6th most desired destinations with yearly increases of 66.6% and 70.7% respectively



Undergraduate degrees in Art & Design (17.7%) and Social Sciences (12.3%) are more popular here than in any other region



Northern and Western Europeans place much more importance on student stories (41.9% and 42.9% respectively) and photos and videos of study abroad destinations (14.2% and 16.9% respectively) as helpful resources than other



Online delivery has tripled in importance as a program factor since last year (+202.9%), with the highest proportion of students interested in online delivery coming from Eastern European



14.4% of Western Europeans and 14.2% of Northern Europeans see school's virtual open days as helpful resources, making up the highest proportions in the world



Instagram dominates the attention of prospective students looking at studying undergraduate (60.6%) and postgraduate (44.1%) degrees abroad

Discover student trends from around the world

What are the top study destinations in 2022? How are students communicating with institutions? What are their challenges and concerns in relation to study abroad? Discover this and more in the 2022 State of Student Recruitment with **six regional reports available**.

Visit [keg.com](https://www.keg.com) to access the full series of global State of Student Recruitment reports.

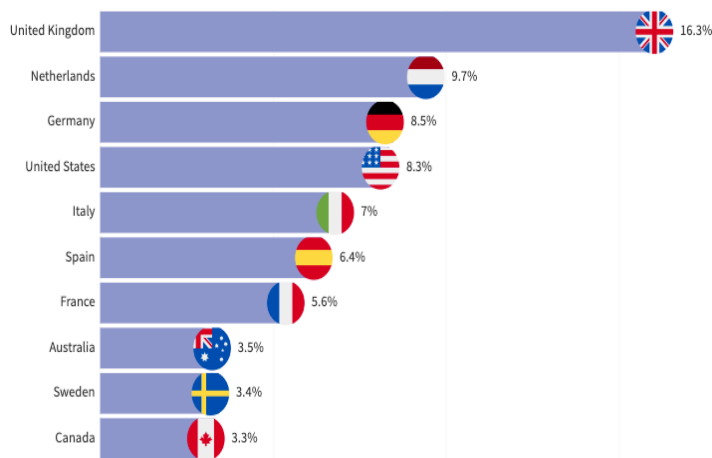
Study Abroad Trends for European Students in 2022

■ We asked students about what motivated and influenced their study abroad decisions, as well as what was holding them back or was concerning them. We were then able to directly compare the data to the results of last year's survey to see how preferences and trends have changed over the last 12 months.

Top Destinations: Germany and Spain become the 3rd and 6th most desired destinations with yearly increases of 66.6% and 70.7% respectively

The United Kingdom is European students' top study abroad destination for the third consecutive year. Last year's second most-popular destination, the United States, has fallen down the list by 31%. This year's second and third have instead been taken by the Netherlands and Germany. There are more students in Europe than anywhere else interested in studying in the Netherlands (9.7%). Europe has the second-highest proportion of students interested in studying in Germany (8.5%) after Asia. Germany as a destination increased in popularity by 66.6% since 2021. Both Germany and Spain as top destinations are at their highest levels of interest in this region since 2019, with Spain jumping by 70.7% in prospective student interest.

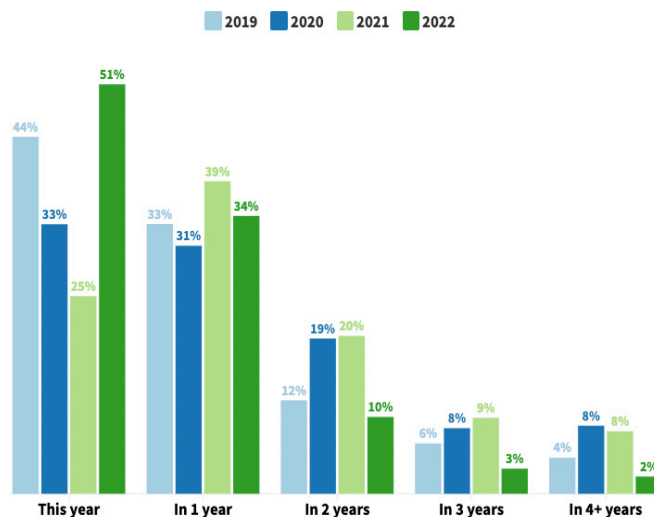
Comparing European student interest to other world regions



Top Study Abroad Destinations for European students

also shows that Europeans are more interested in Sweden (3.4%), Switzerland (2.7%), and Finland (1.8%) than any other region despite the latter two countries falling lower on the top destination list.

Looking into student preference in regions within Europe showcases some significant differences. Only 10.3% of Northern Europeans are interested in the United Kingdom as a study abroad country compared to 18.8% of Southern Europeans. Northern Europeans, however, hold the highest levels of interest in Italy (8.8%), France (7.4%), and Australia (5.9%) than other regions. Southern Europeans are more interested in the Netherlands (11.5%), and prospective students from Western Europe look to the United States (10.7%) and Canada (6.2%) more than other students in Europe.



When do European students plan to study abroad

Top Programs: Undergraduate degrees in Art & Design (17.7%) and Social Sciences (12.3%) are more popular here than in any other region

Health & Medicine is undoubtedly a subject that holds prospective students' attention across all degree types. However, looking at the top degree subjects by prospective students' degrees of interest also shows the distinct popularity of an undergraduate degree in Art & Design in Europe. Undergraduate degrees in Art & Design (17.7%) and Social Sciences (12.3%) are more popular here than in any other region.

European prospective students are also the most interested in a postgraduate degree in Art & Design (11.9%) as well as Economics (9.8%). At the PhD or Doctorate level, Natural Sciences (20.1%) and Languages (9%) are at their highest levels compared to other regions.

Student Journey: 50.8% of prospective students plan to head overseas in the coming year, more than double last year's numbers

As for when European students are planning to study abroad, the answer is soon. 50.8% of prospective students plan to head overseas in the coming year, more than double the proportion of students who indicated the same in 2021 (+107.2%). This lean towards a shorter student journey is consistent across all regions of Europe, and is one of the highest proportions across world regions overall, second only to Asia (51.8%).

This year's survey also showed that 71.9% of European students are researching or have already started to research their study options one year or less in advance before submitting an application, and only 9% start their research 2 or more years before planning to apply. The shorter pipeline emphasizes the crucial task of grabbing students' attention in the research stage.

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Top Motivations: The prospect of learning a new language and studying for free or for less have risen as top motivators by 26.6% and 66.4% respectively

Top motivations for studying abroad have remained relatively consistent from last year, with personal development, experiencing a new culture, and achieving career goals at the top of the list. Two other motivations have increased significantly in proportion, including the prospect of learning a new language (+26.6%) and studying for free or for less (+66.4%).

Comparing within global regions shows that Western Europeans are the most motivated by learning a new language in the world (24.2%) and are more motivated by experiencing a new culture (53.1%) than the average European. Southern Europeans find much more motivation in achieving career goals (51.2%) than other Europeans. Motivations that are higher than the European average for Eastern Europeans are accessing higher quality teaching (38.7%), studying for free or for less (19.5%), and getting a visa to live in another country (17.3%), each of which are the fourth-highest proportions across global regions. In contrast to these more practical motivators, Northern Euro-

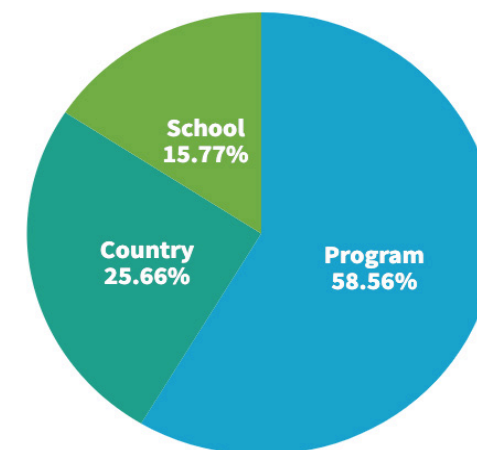
pean student data shows the highest motivation globally from possibilities of making new friends and widening professional networks (34.2%).

When European students were asked to choose the factors they find most helpful in the decision-making process, scholarships and funding information (45.4%), student stories of studying abroad (35.2%), and ranking lists (32.1%) rise to the top. Various regions of Europe also show significant differences in what factors they perceive as helpful. Photos and videos of study abroad destinations are more helpful to Western (16.9%) and Northern Europeans (14.2%) than for other students in Europe, and Southern Europeans are more likely than other Europeans to see scholarships and funding information as helpful with decision-making (50.6%).

Comparing European regions to other global regions also shows that school's virtual open days are most popular in the world in Western (14.4%) and Northern Europe (14.2%). Northern Europeans have the highest global proportion for finding social media helpful (21.9%), and student stories are more popular in Western (42.9%) and Northern Europe (41.9%) than nearly anywhere else in the world except for Ireland (45.6%). Additionally, Eastern European students are the group who see study abroad websites (34.6%) as more helpful in decision-making than other global regions.

Top Influences: Northern and Western Europeans place much more importance on student stories (41.9% and 42.9% respectively) and photos and videos of study abroad destinations (14.2% and 16.9% respectively) as helpful resources than other Europeans

Student interest in finding information on various social media platforms will depend on the degree type that they are interested in. Instagram is the platform of choice for students interested in undergraduate and postgraduate level degrees. Students looking for a PhD or Doctorate degree abroad are more easily reachable across several platforms, though LinkedIn rises above the rest.



What do European students consider first when they're researching universities

Online versus on campus learning

■ Following the pandemic, there has been debate over whether students wish to return to campus and the classrooms again, or whether the freedom online learning created is hard to shake off. For study abroad students, online learning has meant they can access the best schools across the world, but without having to move country, and potentially deal with the challenges associated with that.

Top Considerations: Program overshadows a country or school as a first consideration for the 4th year in a row, and the country has risen in importance, especially in Northern Europe, reversing a consecutive 3-year fall

To learn about how European students make study abroad decisions, we asked what they consider first when deciding where to study abroad. Survey data collected over the last four years shows an increasing focus on the program as a first consideration every year, increasing 16.7% since 2019. A large proportion of Southern European students in particular prioritize the program first (63.4%).

Other trends observable in European students' prioritization of the school or country have reversed in 2022. After growing interest in the school as a first consideration between 2019-2021, the school has dropped by 27.1%. European students are instead showing greater

interest in a study abroad country as a first consideration after a decreasing trend over the last three years. The interest in a country is especially pronounced in Northern Europe (30.3%).




Perceptions of the most important factors in a study abroad program by those who consider the program first have remained largely unchanged across the region of Europe. Two of the biggest changes, however, can be found in the program factors relating to delivery. On-campus delivery has increased in importance by 24.8% and was selected as one of the most important program factors by 21.7% of all European students as well as 26.9% of all Western Europeans. Online delivery jumped even higher, tripling in importance as a program factor since last year (+202.9%). The importance of online delivery in a program was chosen as an important factor by 8.2% of students in Europe overall, with the highest proportion of students within the region coming from Eastern European students (11.5%).






Student Voices

■ To understand the student perspective in this region more deeply, we asked: What are some common challenges for you and other students from your country who want to study abroad? Each response indicates the student's nationality, age, and highest completed degree level underneath.

Common Challenges Faced

		
Cost of living	Logistical concerns	VISA problems
"Average living expenses being bigger than back home and the bureaucracy of paperwork"	"To get along with all the new routines, make relations, find a place, find a job, the fees"	"Visa problems, some study abroad make it more complicated for international students. It is also harder for us to get scholarships than American students"
Romanian; 22-25; Bachelor's degree	Swedish; 26-35; Associate's degree	Italian; 18-21; High school degree or equivalent

How To Encourage Potential Students

		
School information	Student community	Financial help
"Knowing about the school and degree or talking to people"	"Being acquainted with some of the students or having some sort of community to belong to"	"Financial help, and help to study in another continent, such as in Japan or South Korea"
Spanish; 18-21; High school degree or equivalent	Romanian; 18-21; High school degree or equivalent	Lithuanian; 22-25; Bachelor's degree



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