



State of Student Recruitment

EUROPE



Our panel



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Housekeeping

Your audio and video are OFF by default

The webinar will be recorded – we will email you a copy tomorrow.

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If you have a question for our panel, please submit it using the **Q&A tab!**

Student mobility in Europe



Top destinations 2025

	United Kingdom	19%
	United States	13%
	Germany	7%
	Canada	6%
	Italy	6%
	Australia	4%
	Netherlands	4%
	Spain	3%
	France	3%
	South Korea	2%

Source: Keystone survey data

Interested markets

	China	12%
	India	6%
	U.S.	5.7%
	Germany	5%
	Italy	4.7%
	France	4%
	Spain	3.7%
	Brazil	3%
	Greece	2%
	Turkey	2%

Source: Keystone Share of Search data across Keystone student sites

What attracts students to European universities

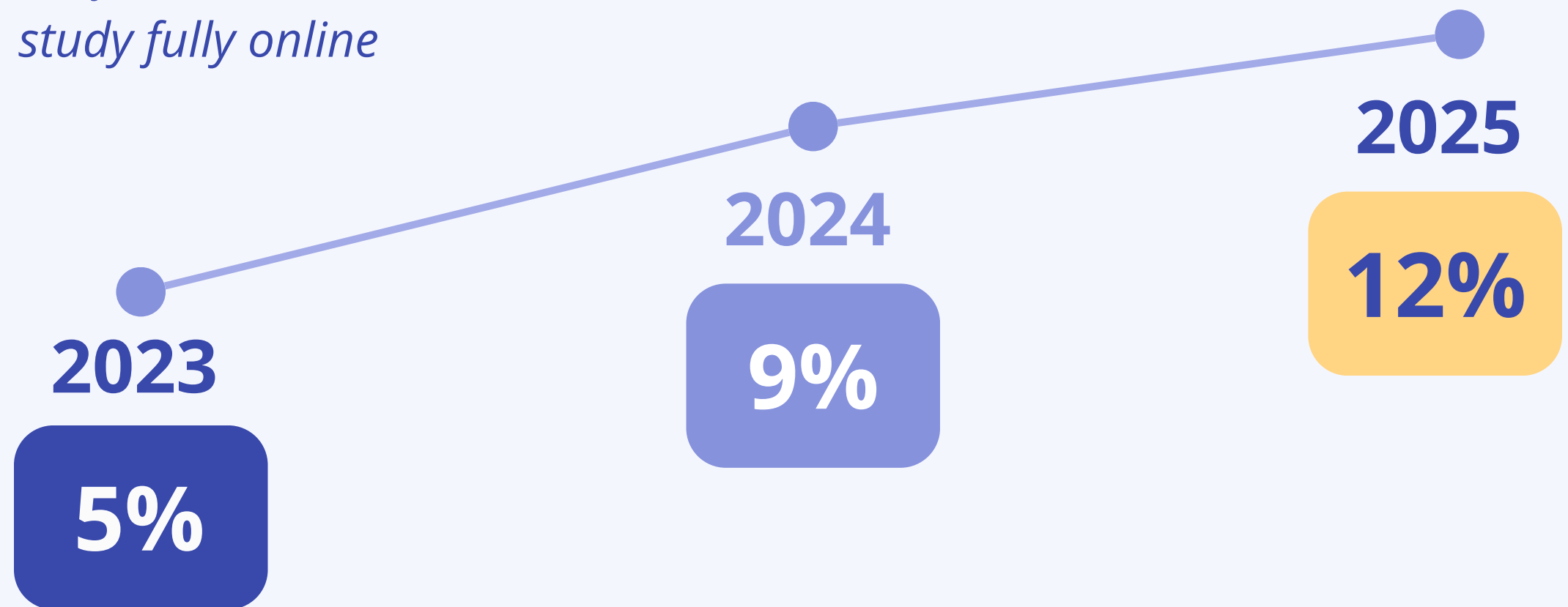
<i>Students who want to study in...</i>	Europe	Spain	Germany	France	Nordics	USA
Safety & politics of country	45%	35%	43%	36%	58%	34%
Reputation of institutions	44%	29%	51%	40%	52%	56%
Culture	40%	48%	35%	47%	45%	37%
Subjects offered	38%	28%	43%	37%	45%	48%
Affordability	25%	18%	26%	28%	28%	19%
Visa & entry requirements	21%	22%	20%	21%	27%	17%

Growing interest in online study

After the pandemic there was a jump in students who wanted to study on campus.

Several years on, there is now a return to students wanting to study online, or partially online.

% of students who want to study fully online



Global data (not European specific)

Turn to authentic communications



63%

of prospective students want to be contacted by email **-13% from 2024.**

+150%

in person communication increased in 2025.

How long do you research study options before applying...

...and a shorter student journey

53%

Less than six months

29%

6 to 12 months



Questions?



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