

2025



State of Student Recruitment

Europe as a study destination



Students who want to
Study in Europe in 2025



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.

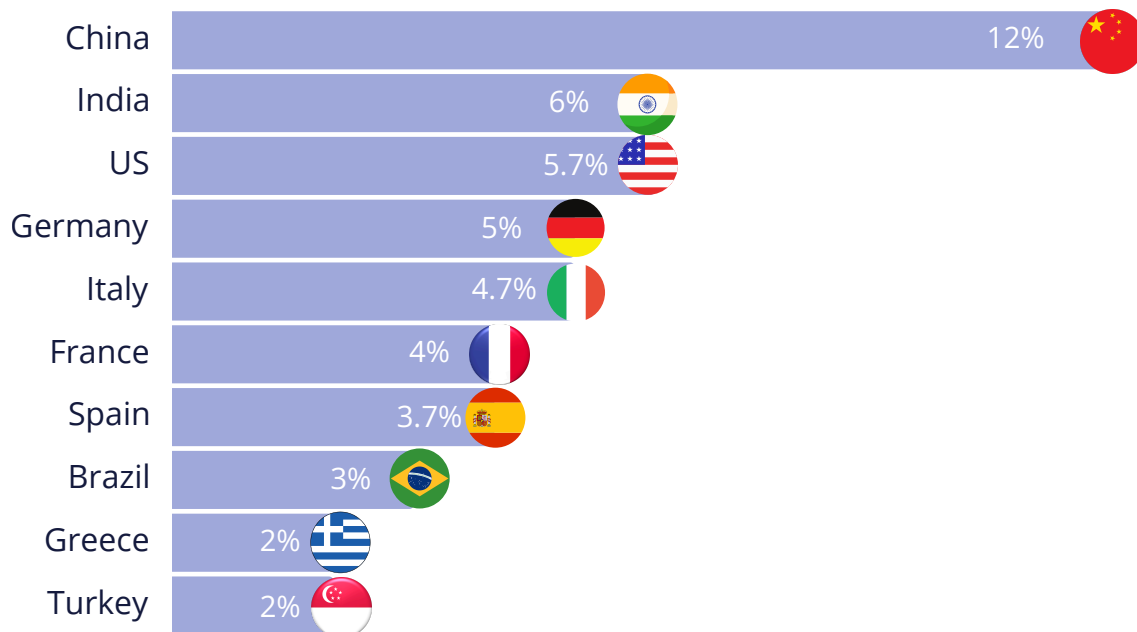
In this edition, we look specifically at students who want to study at European institutions.

Our 2025 State of Student Recruitment Study in Europe 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 Europe in 2025



Unsurprisingly, **European audiences** account for the largest share of global search interest in European study, making up **41% of total searches**.

The next highest regional share comes from East Asia (14%), with **China** representing a significant portion of that interest. In fact, China is the largest single source of searches, accounting for over 12% of all global searches.

There are strong levels of interest in European study also from India and the U.S.

Top subjects to study in Europe

- | | | |
|---------------|----------------|------------------|
| 1 Healthcare | 6 Design | 8 Social science |
| 2 Technology | 7 Architecture | 9 Art |
| 3 Engineering | 5 Management | 10 Law |
| 4 Business | | |

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 in Europe

1	To develop my skills
2	To establish my career
3	To qualify for further study
4	To have an adventure
5	Interested in my subject

Students wanting to study in Europe consider the program before the school

We asked : Which do you consider first?

Program

46%

School

32%

Country

22%

The program remains the most important first choice factor, with nearly half of international students prioritising it when considering a European study destination. This 'levels the playing field' for smaller or less-known institutions - the program is more important than the school's standing.

Influence is moving away from country level (28% in 2024, dropping to 22% in 2025) and increasingly towards the school level (rising from 25% in 2024 to 32% in 2025).

The suggests students are becoming more targeted in their approach, starting with the specific program 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 Europe, with half of students citing internships as their top factor.

64%

Affordable fees

50%

Work placements or internships

31%

Academic networking opportunities

31%

Availability of accommodation

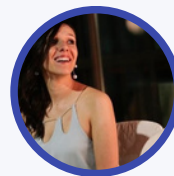
21%

Employment outcomes



We have an employability adviser in each of our campuses at Schiller, and they oversee internships for our students. But not only this, they are putting our students in contact with companies from day one, by bringing companies inside our classrooms and involving companies in our academic model.

Our academic model is challenge based learning, so students are working on real challenges with real companies... We don't wait for an internship to put students in contact with a company.



Andreea Ghiurcanas

Schiller International University, Madrid

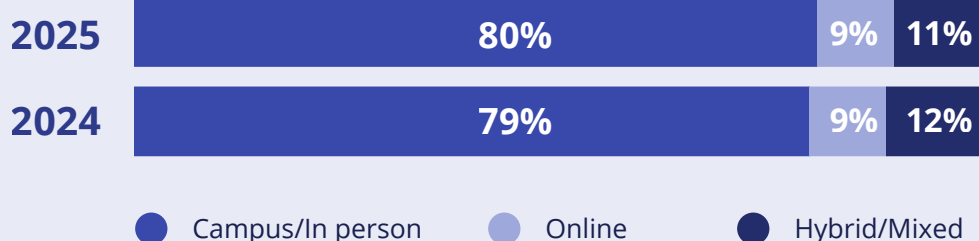
Head of Student Recruitment

From Keystone's webinar: *State of Student Recruitment Europe* (November 2025)

Flexibility

On-campus study remains the overwhelming first choice for international students. Globally, we see a shift towards online study, but it seems that is yet to happen in European destinations.

How students prefer to study at European institutions:



Influences

How do students perceive Europe?

To better understand why students want to study in Europe and specific European countries, we surveyed students to find out how they rate their chosen country on various factors (listed in the table below).

Overall, Europe outperforms the U.S when it comes to how safe and politically stabile students perceive it to be, with 45% ranking Europe as ‘very good’, compared to 34% for the U.S.

Students believe Germany’s institutions have a strong reputation, with 51% saying the reputation is ‘very good’, while there is a strong cultural pull to both France and Spain. Perception of safety in the Nordics is high, with 58% of students ranking their chosen Nordic study country as ‘very good’ for safety and political stability.

Students who want to study in...	Europe	France	Netherlands	Germany	Spain	Nordics
Safety & politics of country	45%	36%	48%	43%	35%	58%
Reputation of institutions	44%	40%	49%	51%	29%	52%
Culture	40%	47%	42%	35%	48%	45%
Subjects offered	38%	37%	40%	43%	28%	45%
Affordability	25%	28%	21%	26%	18%	28%
Visa & entry requirements	21%	21%	21%	20%	22%	27%



We put a lot of focus in our communications - both in student created content and the communication the university sends to prospective students - about what it's like to be in a small town in the middle of Sweden. We're a small town that happens to have an IKEA, and it's a very different experience than somebody visualizing Stockholm.



Michael Oppenheimer
Dalarna University, Sweden
Director of International Student Recruitment



From Keystone’s webinar: State of Student Recruitment Europe (November 2025)

Top factors influencing students' decisions to study in Europe

Students are showing a growing focus on the practical outcomes of their studies, with the largest increases in perceived influence for factors such as course content, costs, and post-study work opportunities.

Overall, this suggests that students are increasingly evaluating the return on investment (ROI) of their study choices, carefully weighing how courses translate into tangible benefits for their future careers.

We asked students: What factors influence your study decision?

	2025	2024
Subjects & study opportunities	57%	46%
University fees & living costs	53%	30%
Post-study work opportunities	43%	35%
Reputation & university rankings	32%	34%
Culture & leisure opportunities	31%	31%

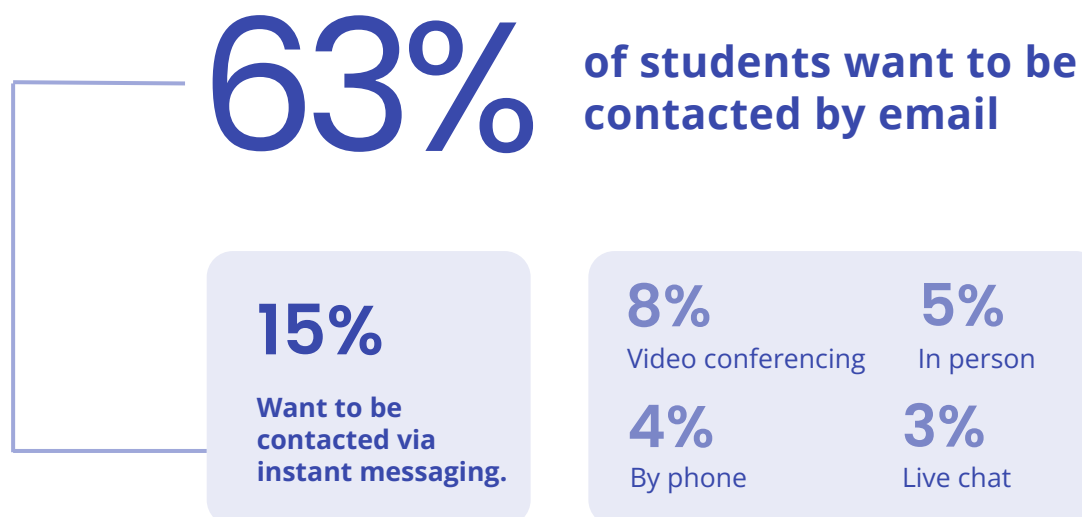
The influence of student reviews

With peer-to-peer communication on the rise, we asked students if they take reviews into consideration in their decision-making, with **38%** of students saying they did 'a lot'.



Communications

Top student communication channels



Email remains by far the most popular channel for prospective students who want to study in Europe.

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 Europe.

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 international students wanting to study in Europe, they tend to 'cast the net wider', with around 65% applying to 3+ or more institutions in 2025.

We asked students that wish to study in Europe:

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

2025

1	18%
2	17%
3	25%
4	11%
5+	29%

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

Accessibility of information

With easier access to information, it is no surprise the majority of prospective students are spending **less 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.

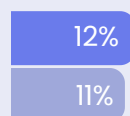
Less than six months before applying



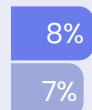
6 to 12 months before applying



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 Europe

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

Cost <i>Affordability of fees/ living</i>	75%	+12% in 2025
Eligibility <i>Meeting the school or degree requirements</i>	41%	
Political uncertainty <i>Impact of political attitudes or unrest</i>	23%	+35%
Choice <i>Hard to pick between programs</i>	25%	
Safety <i>Worried about life at the university / in another country</i>	18%	
Confidence <i>Not sure if good enough</i>	19%	-42%



2025

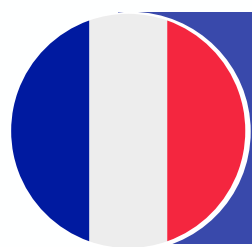


State of Student Recruitment

Regional European Insights

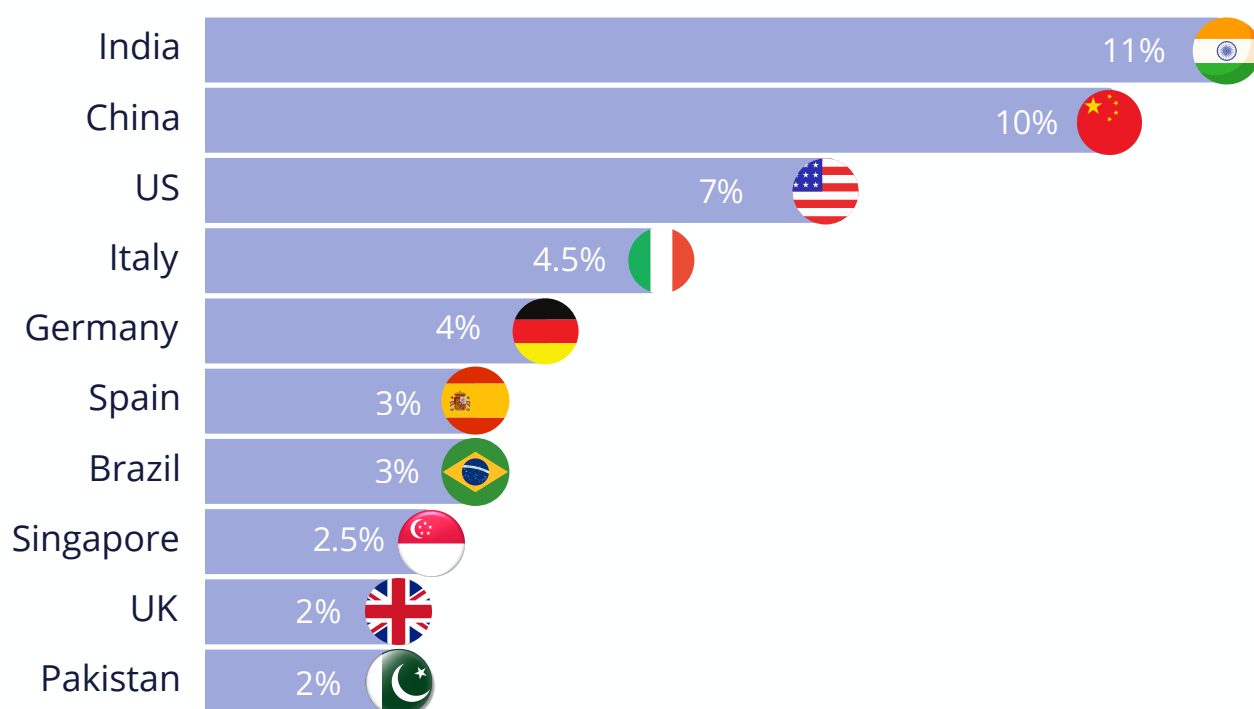


Students who want to
Study in Europe in 2025



Students who want to study in France

Top nationalities interested in studying in France in 2025



We see a larger proportion of search interest in France coming from Africa and South Asia than we do for all European study destinations, with India accounting for 11% of searches.

There is considerable interest in studying in France from within Europe itself, with 31% of European students saying France is their top study destination.

Student perceptions of French university education

When it comes to France, survey data shows international students are primarily drawn by its rich cultural appeal (47%).

It is also seen as more affordable than Spain and Germany, and Europe collectively as a destination. However, its institutions don't have as strong a reputation as neighbouring countries.

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

Students interested in France influenced by the study opportunities available

61%

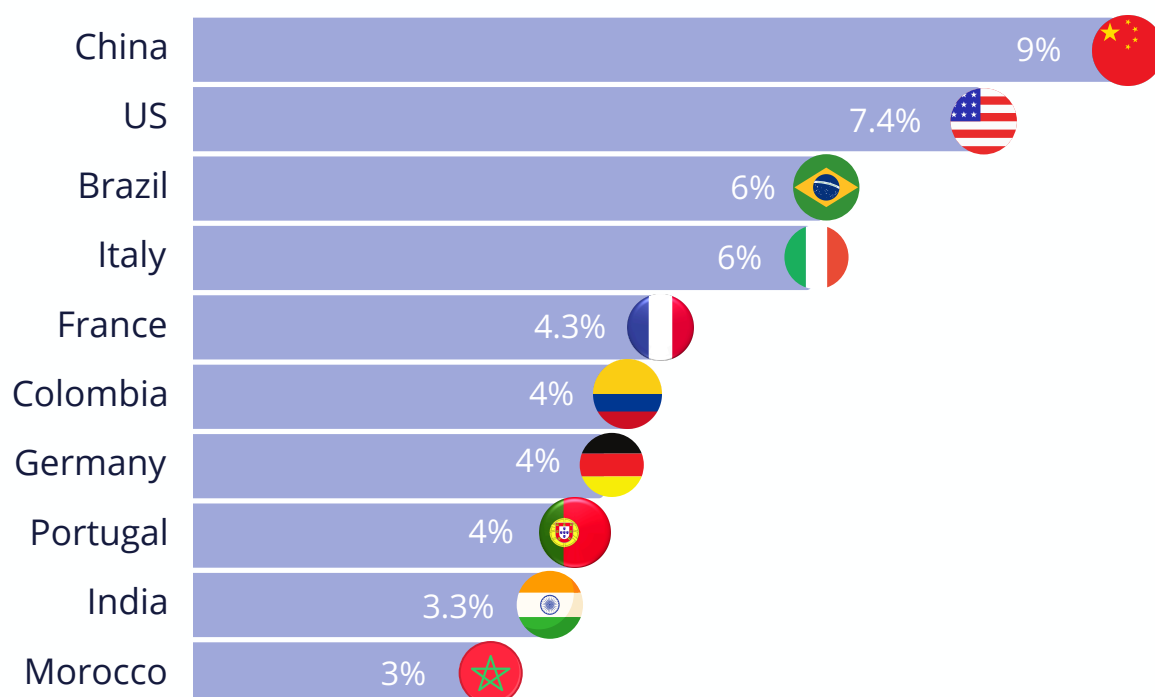
of students interested in French study options said they are most influenced by the subjects and study options that are available in France.

This is higher than the overall European average (57%) and for Germany (54%) and Spain (51%).

Students who want to study in Spain



Top nationalities interested in studying in Spain in 2025



Unsurprisingly, **interest from South America** is higher here than we see for other European destinations, such as Germany or France.

What may be more surprising is only one native Spanish-speaking country (Colombia) appears in the top 10.

The next highest regional share comes from the U.S., with **China** representing the highest share of search actions for Spanish study.

In fact, China is the largest single source of searches, accounting for 9% of all global searches.



Student perceptions of Spanish university education

For Spain, the data shows that international students are primarily motivated by its **cultural appeal** (48%), which is the highest across all European destinations.

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

At the same time, academic and institutional factors such as **reputation** (29%) and **subjects offered** (28%) scored the lowest among the countries compared, suggesting that Spain's attraction lies more in personal and cultural experiences than in perceived academic prestige.

Blended study important to students in Spain

16%

of students interested in Spanish study want to complete **a mix of on campus and online study**, compared to **11%** of all **European study** destinations.

On campus study remains the most popular mode of study, with 73% of students interested in Spanish options wanting to study on campus.

Spain: A destination for adventure

For many international students, the desire “to have an adventure” is a powerful motivation when choosing where to study in Europe.

In Spain, this sense of adventure is especially strong, as the country offers a unique blend of rich culture, vibrant social life, and diverse landscapes.



*Students who want to study in Spain are 31% more motivated to pick Spain to ‘**have an adventure**’ compared to other European study destinations.*

+31%

Instagram as the most popular social media platform that influences students

For Spain, **Instagram** (31%) is the most influential platform shaping students’ study abroad decisions, followed by YouTube (20%) and TikTok (17%).

This shows that students interested in Spain are highly responsive to visual and experience-based content.



Instagram

31%



LinkedIn

25%



YouTube

25%



Facebook

16%



TikTok

11%

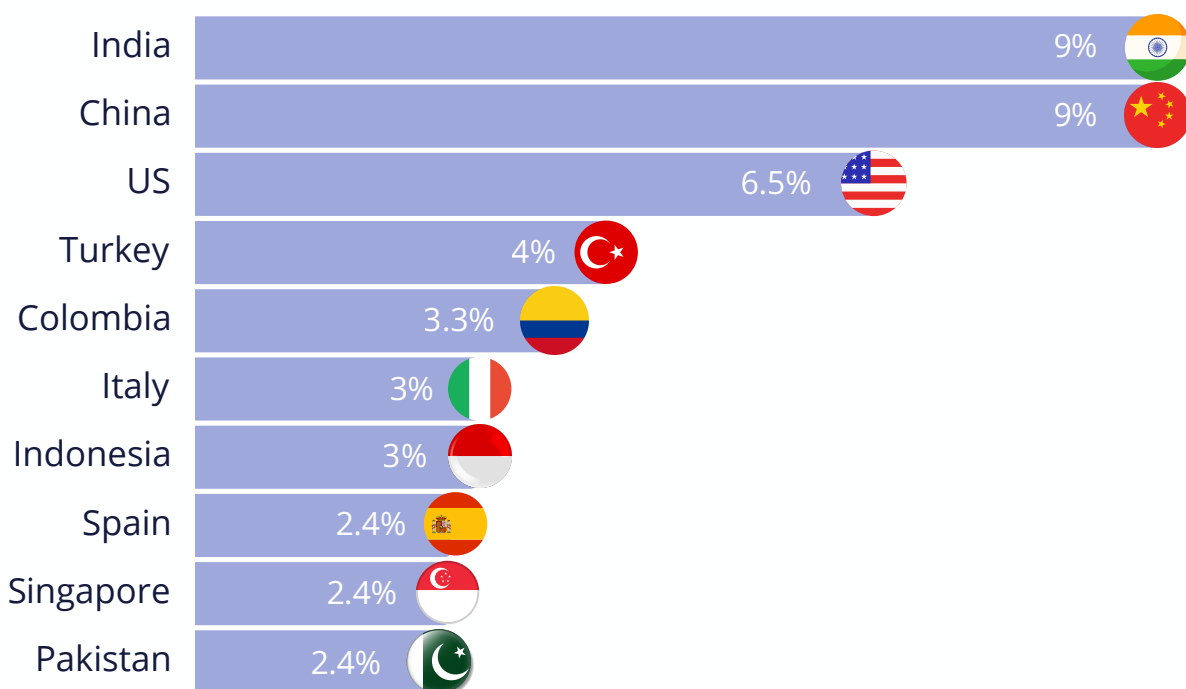
31%

of prospective students said Instagram influences their study choice



Students who want to study in Germany

Top nationalities interested in studying in Germany in 2025



International interest in Germany is less European-centric, with only around a quarter of searches coming from European audiences.

Interest from East Asia and South Asia remains strong, together accounting for 28% of all searches.

The top 10 countries highlight an increasingly global audience.

Seven of them are located outside Europe, including North America, South America, South Asia, Southeast Asia, and East Asia.



Student perceptions of German university education

When it comes to Germany, the data shows that international students are primarily attracted by its strong **institutional reputation** (51%) and the **range of subjects** offered (43%), confirming its status as a hub for high-quality education.

However, with lower scores for affordability (26%) and culture (35%), students appear driven more by academic and career goals than by lifestyle factors.

Students who want to study in...	Germany	France	Spain	Europe
Reputation of institutions	51%	40%	29%	44%
Subjects offered	43%	37%	28%	38%
Safety & politics of country	43%	36%	35%	45%
Culture	35%	47%	48%	40%
Affordability	26%	28%	18%	25%
Visa & entry requirements	20%	21%	22%	21%

Post-study work visas are also a major draw for students interested in Germany, influencing **45%** - more than for any other leading European destination. This factor has grown in importance, rising from 36% in 2024, highlighting Germany's appeal for those seeking career opportunities after graduation.

Students interested in Germany applying to more universities than on average



of students interested in German study will apply to **5+ universities**. This is more than with Europe in general (29%) and for Spain (28%).

Students are ‘casting the net wider’, and spreading their study options.



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