



Destination Europe

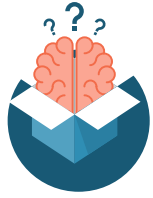
Student interest trends for Bachelor's and Master's programmes in Europe

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Introduction



Studyportals at a glance



9 portals



50+ million
unique visitors
every year



839,000
international
enrolments



3,610+
participating
institutions



203,000+
programmes
listed



90% of English-
taught
programmes
listed

Introduction

This report highlights the evolving trends in student mobility for Destination Europe. It specifically highlights trends for Master's and Bachelor's programmes, allowing universities to gain insights into the shifting demands at these academic levels. The report demonstrates some of the differences in student interest across different levels, and disciplines, and tracks fluctuations in student demand for the most popular destinations in Europe.

The report also takes a closer look at the Business & Management discipline – the most popular discipline for international students in general, and for one in five students looking to study in Europe. By understanding the preferences of prospective students, universities can strategically develop and promote relevant programmes, ensuring they meet the evolving needs of international students.

Executive Summary

European countries feature prominently in the top 10 countries attracting student interest to study abroad, indicating the region's strong appeal for international students. Although Germany holds significant global market share of student interest, there has been a drop in relative demand for programmes offered in Germany. At the same time, the largest decline in relative demand are for programmes offered in Norway, likely influenced by the introduction of tuition fees there. Italy, meanwhile, continues to grow in popularity as a study destination, for both Bachelor's and Master's programmes.

The report also tracks the changes in student interest for sub-disciplines over the past year. At a Bachelor's level, there was a significant decline (22.9%) in interest programmes related to Design, whereas there was a notable increase (20.9%) in the demand for those related to Artificial Intelligence over the past year. Among the top 15 sub-disciplines for Master's programmes, student demand for programmes related to International Relations decreased (-6.2%), while interest to pursue a Master's degree in Data Science & Big Data rose by 8.2%. For the Business & Management discipline specifically, Business Intelligence & Analytics, and Entrepreneurship surged at Bachelor's level by 19.7% and 22.2% respectively., while interest in Engineering Management rose 4.2% at Master's level.



Part One

Top study destinations

Top study destinations globally

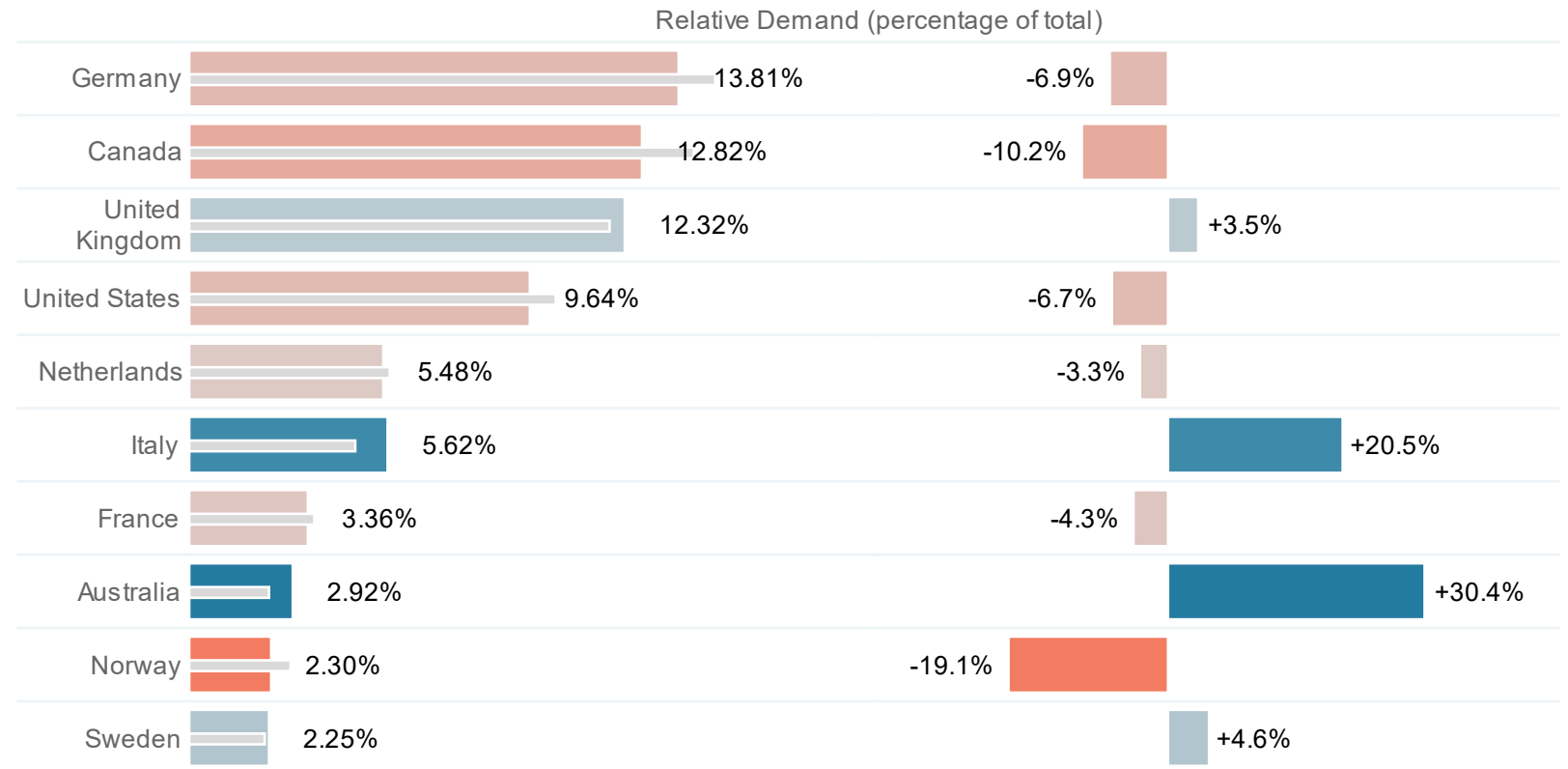
This chart shows the combined interest for bachelor's and master's degrees for on-campus programmes.

On the left-hand side of the chart, the thick bars represent the relative demand for student interest over the past 12 months, while the thin bars inside signify the preceding 12 months. On the right-hand side, the percentages indicate the growth or decline in student interest.

Among the top 10 countries, Canada and the US witnessed a drop in student interest, while Australia experienced significant growth over the last year.

It is worth noting that six of the top ten destinations globally are in Europe.

Germany, the Netherlands, France and Norway saw a drop in student interest. Once again, Italy noted a strong relative change in demand (+20.5%).



Demand by destination

Change in demand by destination

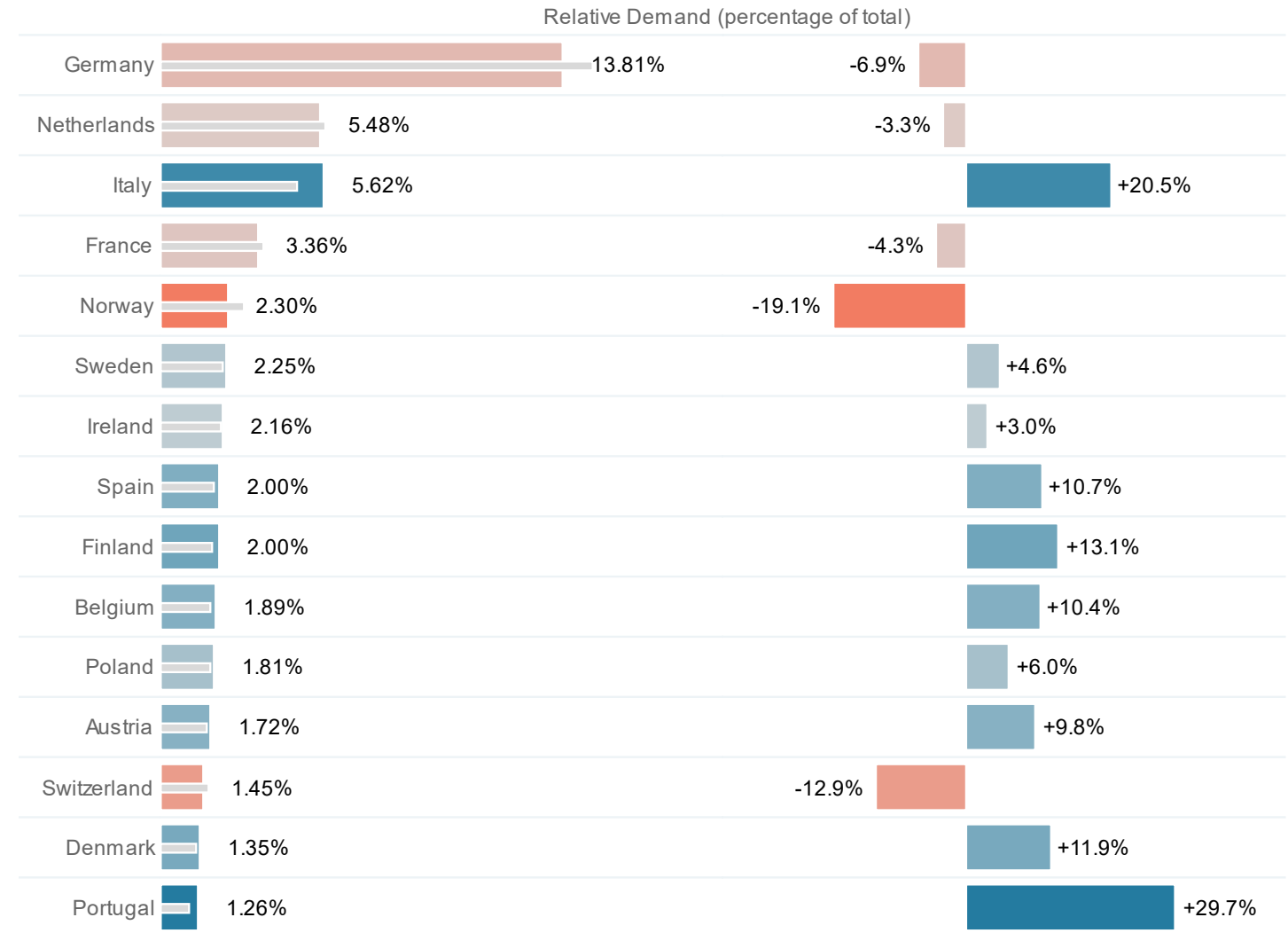
Top study destinations within Europe

The chart shows the top destination countries in Europe in terms of the share of global pageviews.

Student interest has grown for Italy, Ireland, Spain, Finland, Belgium, Poland and Austria.

Conversely, Norway has experienced the steepest decline. This could be attributed to various factors, including, for Norway, the introduction of tuition fees. It is important to acknowledge that behind these trends lie narratives influenced by a range of political, social, and economic reasons.

The UK is excluded from this analysis, in part because of the prevalence of English-taught programmes.



Demand by destination

Change in demand by destination



Damaris Clark

**Analytics consultant
at Studyportals**

Valuable data insights

"There is obviously a lot of nuance when looking at the different countries in Europe. While this report takes a broad view, drilling deeper into this data means institutions can obtain valuable insights that can help them to develop market diversification strategies, identify focus areas and leverage recruitment potential."



Part Two

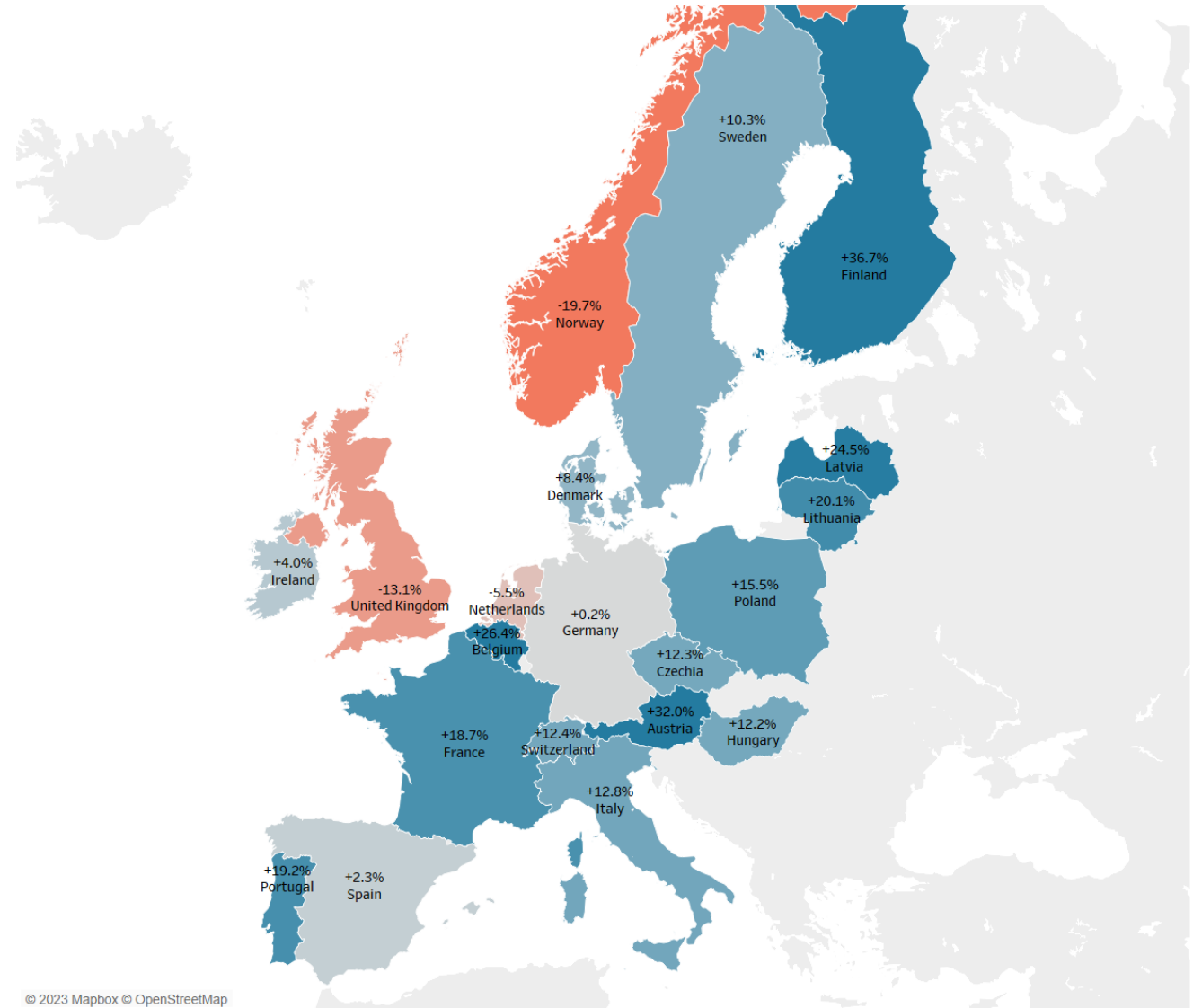
Trends for Bachelor's programmes

Student interest trends for Bachelor's programmes

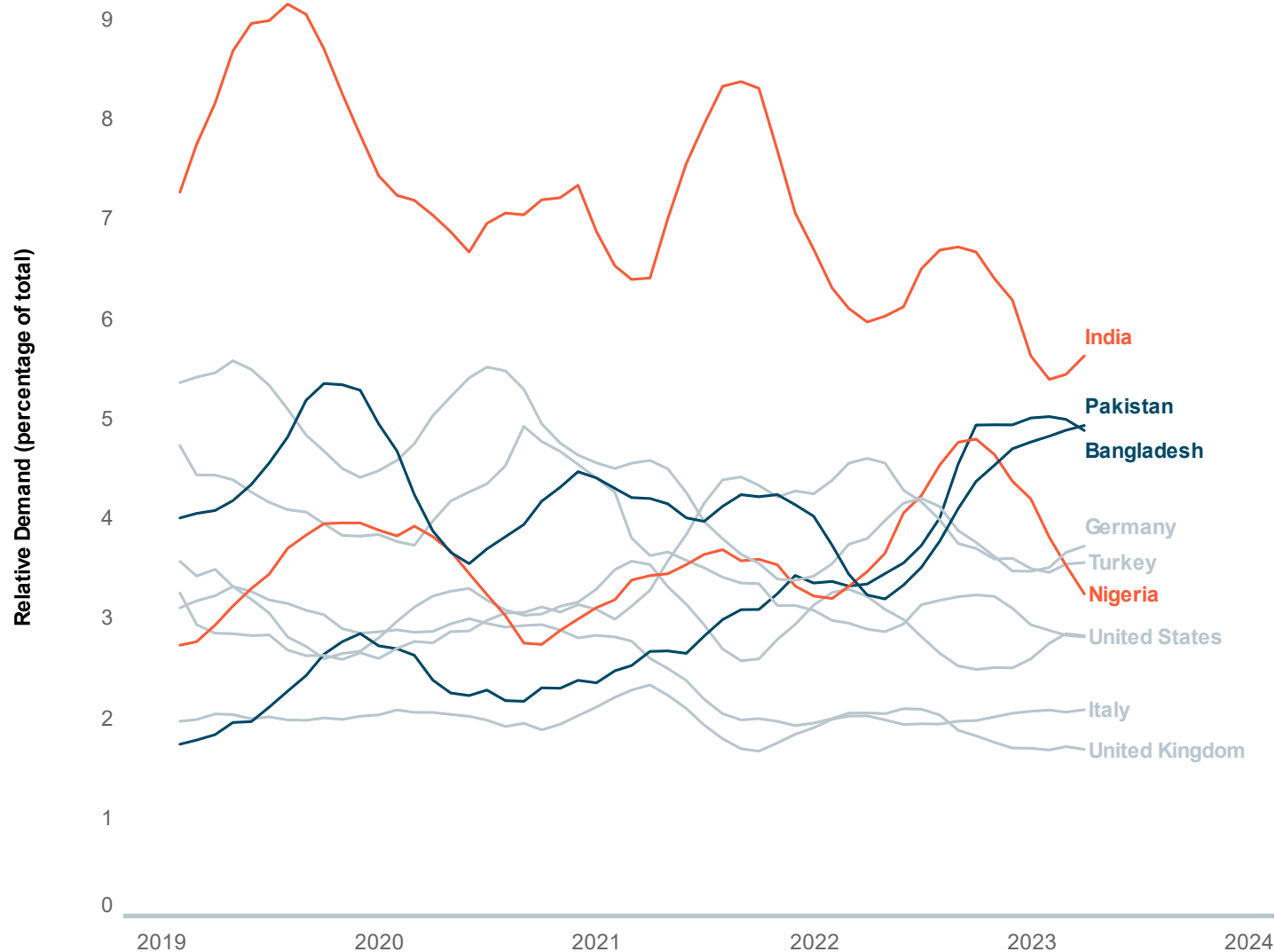
The countries in orange witnessed a decrease in student interest over the last 12 months. Norway saw a 19.7% decrease in interest, likely due to the introduction of tuition fees.

Meanwhile, most other European countries have seen at least a small to moderate increase in interest, with Finland (+36.7%), Austria (+32%) and Belgium (26.4%) leading the pack.

YOY Student interest for on campus Bachelor's



Top origin countries with interest in Europe (Bachelor's)

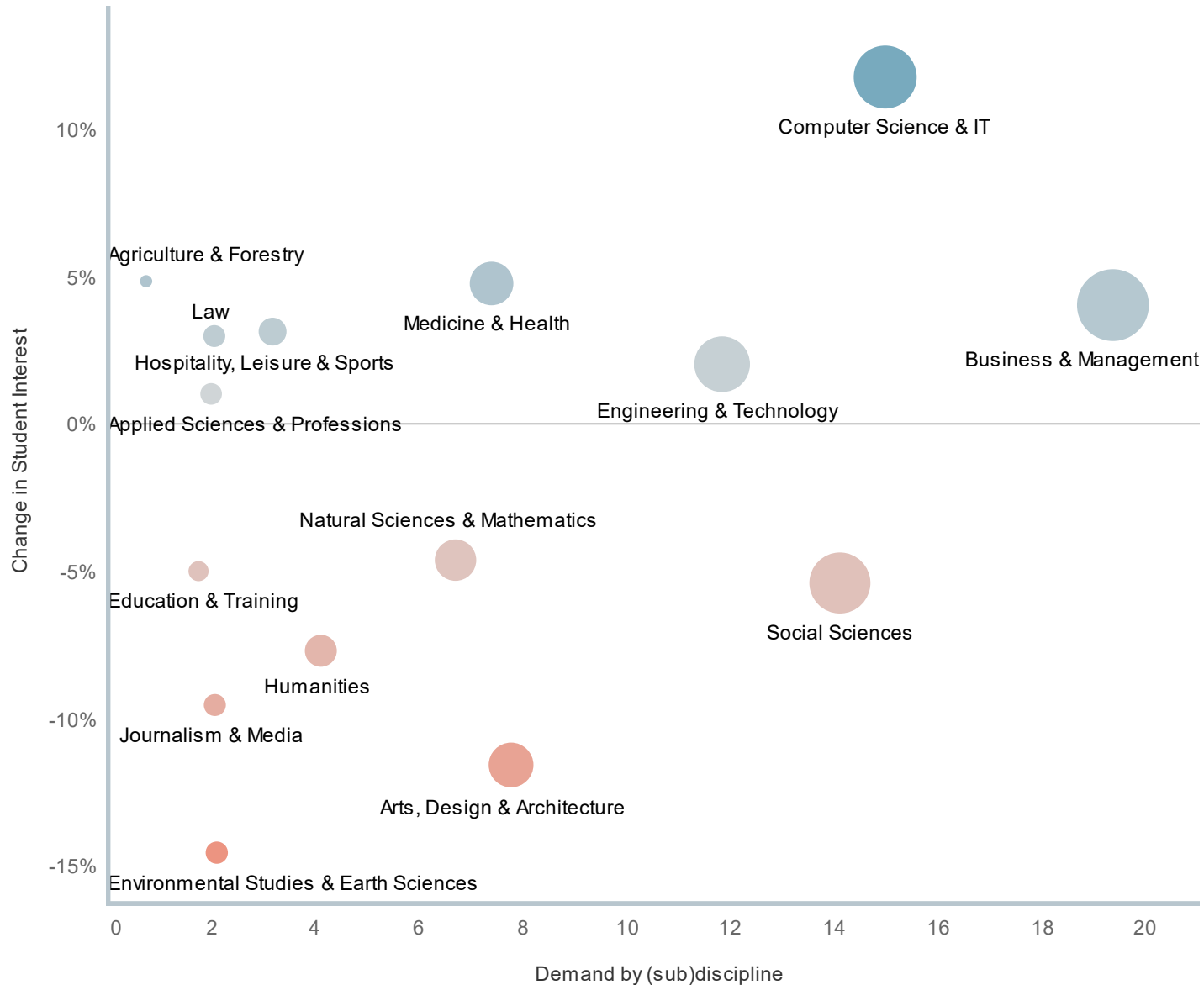


This chart shows the top origin countries for interest in Bachelor's programmes in Europe, as well as the evolution of that interest over the last four years. The y-axis indicates relative demand as a percentage of total pageviews.

Although India generates the largest share of relative demand, this fluctuates drastically and has gradually declined overall.

Conversely, you can see that Bangladesh and Pakistan have increased their share of the interest.

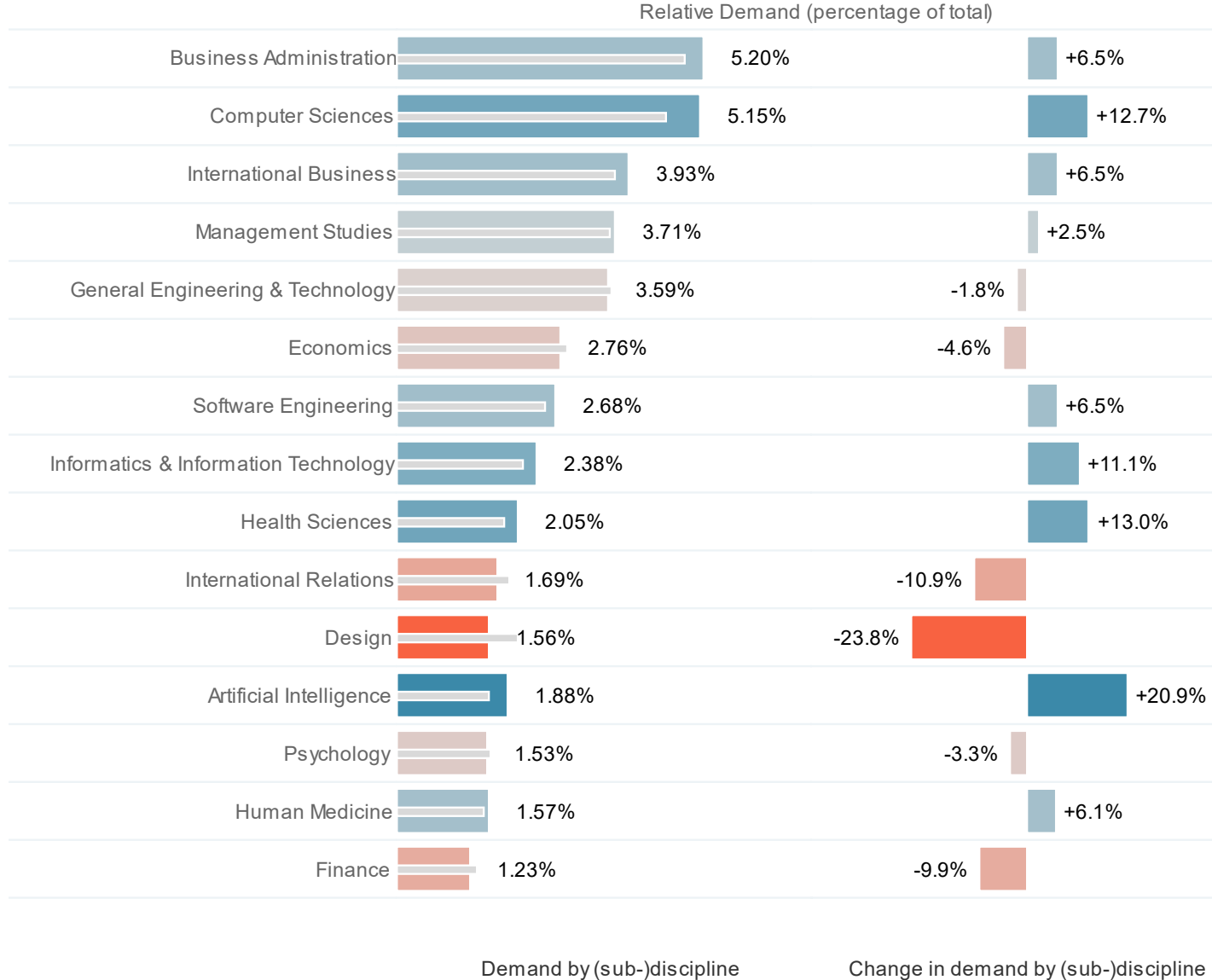
Most popular Disciplines (Bachelor's)



This chart shows the relative demand of student interest and how the share of that interest has developed in the last 24 months. The larger the circle in the chart is, then the larger the volume of interest. Blue circles highlight an increase in interest share, while orange shows a decrease.

The top 3 disciplines of interest are Business & Management (representing over 20% of all student interest), Computer Science & IT (around 15%) and Social sciences (just below 15%). All three show different patterns of development. While interest in Business increased slightly, Computer Science saw the most growth (12%), and Social Sciences experienced a moderate decline in interest despite maintaining a large proportion of the overall demand.

Most popular Sub-disciplines (Bachelor's)



Studyportals defines each programme listed on our portals by one discipline and up to three sub-disciplines. You can think of disciplines as more general study areas and sub-disciplines as specific programmes within these study areas.

This chart shows the top 15 sub-disciplines for on-campus Bachelor's programmes by student interest, and the year-on-year change in relative demand.

Of the 15 most popular sub-disciplines for Bachelor's programmes, Design saw a large drop in interest (22.9%). Interest in Artificial Intelligence instead surged by 20.9% over the last year.



Part Three

Trends for Master's programmes

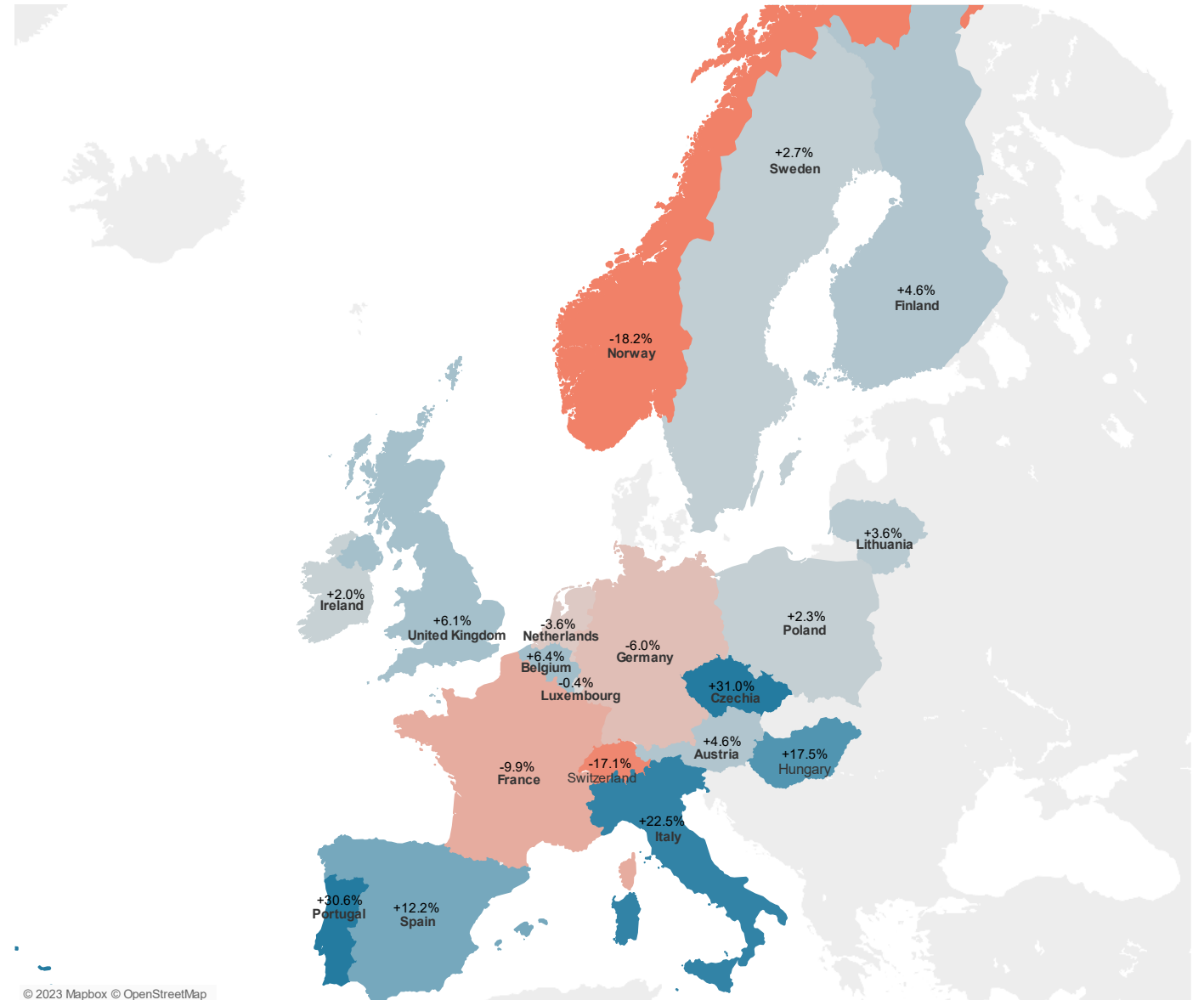
Student interest trends for Master's programmes

There is a slightly different pattern at the Master's level, with France and Germany seeing less growth in student interest compared to Bachelor's programmes.

Meanwhile, some countries which saw more incremental changes at a Bachelor's level have seen a much bigger increase in demand at a Master's level, notably Czechia, Hungary and Italy.

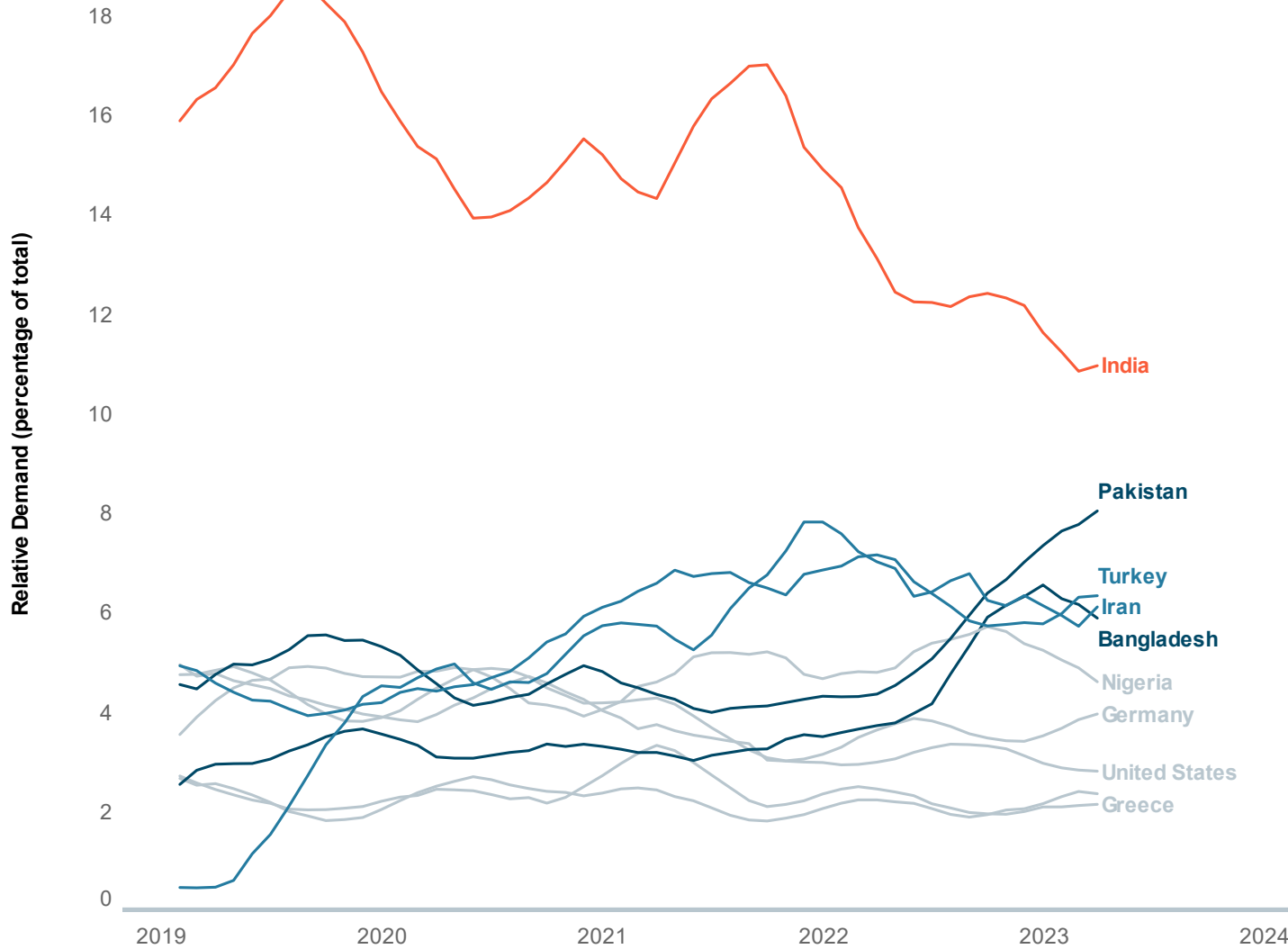
Portugal has also seen a substantial increase in interest at both Bachelor's and Master's level.

YOY Student interest for on campus Master's



© 2023 Mapbox © OpenStreetMap

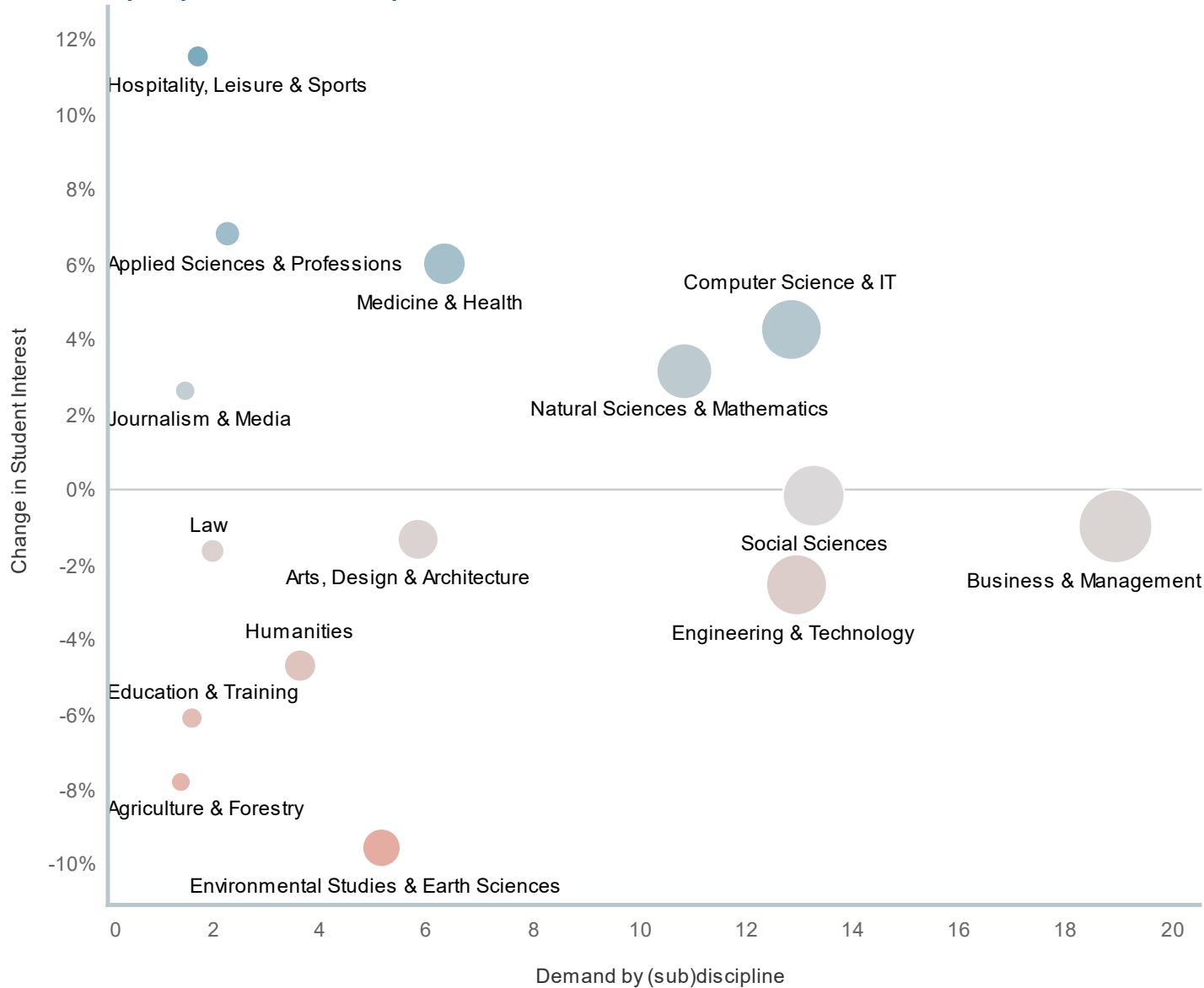
Top origin countries with interest in Europe (Master's)



As similarly seen at the Bachelor's level, although India generates the largest share of relative demand for Master's programmes, the data equally shows a general decline in interest year-on-year.

On the other hand, Bangladesh and Pakistan again show strong demand to study Master's programmes, alongside students in Turkey and Iran.

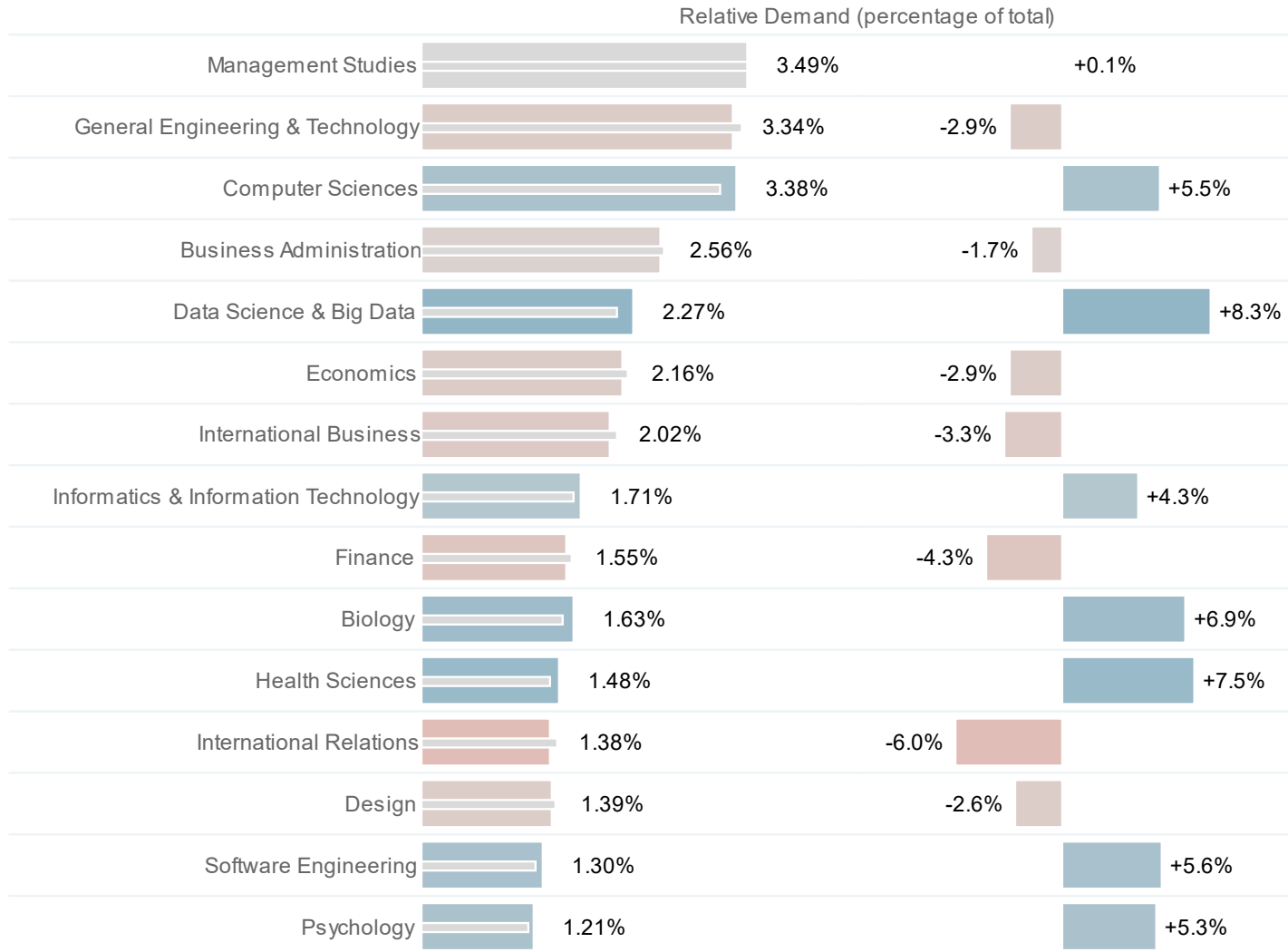
Most popular Disciplines (Masters)



At a Master's level, Business & Management is again the most popular discipline, followed by Social sciences and Engineering & Technology. Collectively these three disciplines capture 50% of student interest.

However, all three disciplines have seen a mild decline in student interest. In contrast to this, Hospitality, Leisure and Sports, whilst only accounting for 2% of student interest, has seen an increase of over 10% in the last 24 months.

Most popular Sub-disciplines (Master's)



Demand by (sub-)discipline

Change in demand by (sub-)discipline

Amongst the 15 most popular sub-disciplines for Master's programmes, International Relations witnessed a dip in student demand (-6.2%), while interest for a Master's related to Data Science & Big Data rose by 8.2% over the last year.

Interestingly, although student interest to study International Business in Europe grew at a Bachelor's level, it fell at a Master's level. On the other hand, interest to study Psychology in Europe fell at a Bachelor's level but increased at a Master's level.



Part Four

Trends for Business & Management

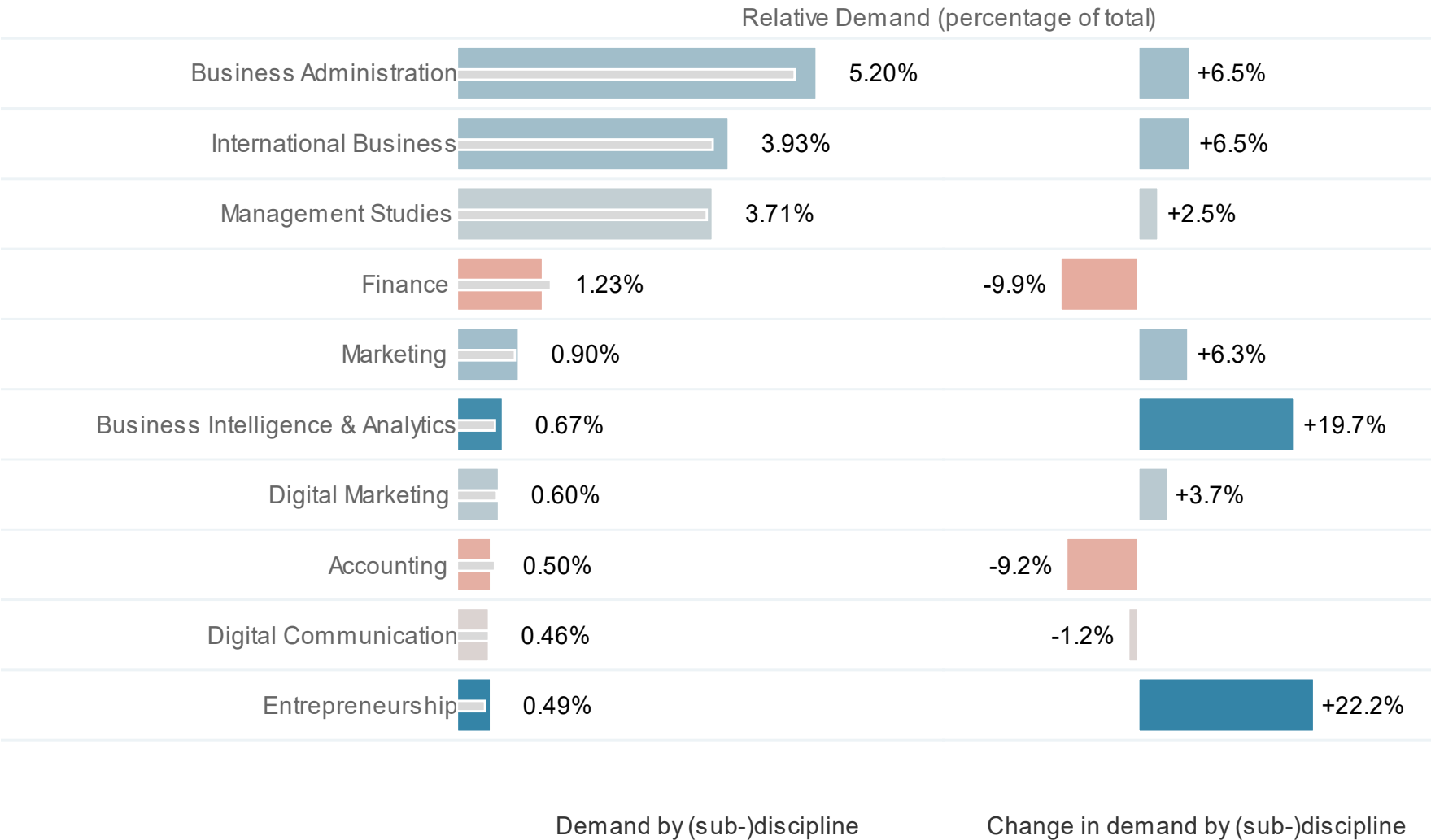
Business and Management: A closer look

Business & Management is the most popular discipline for students interested in both Bachelor's and Master's degrees in Europe.

The following charts examine this discipline in more detail, with sub-discipline data providing some useful insight into the nuances of interest within a subject area, as well as how institutions can gain a competitive edge when creating programme titles based on organic student search behaviour.



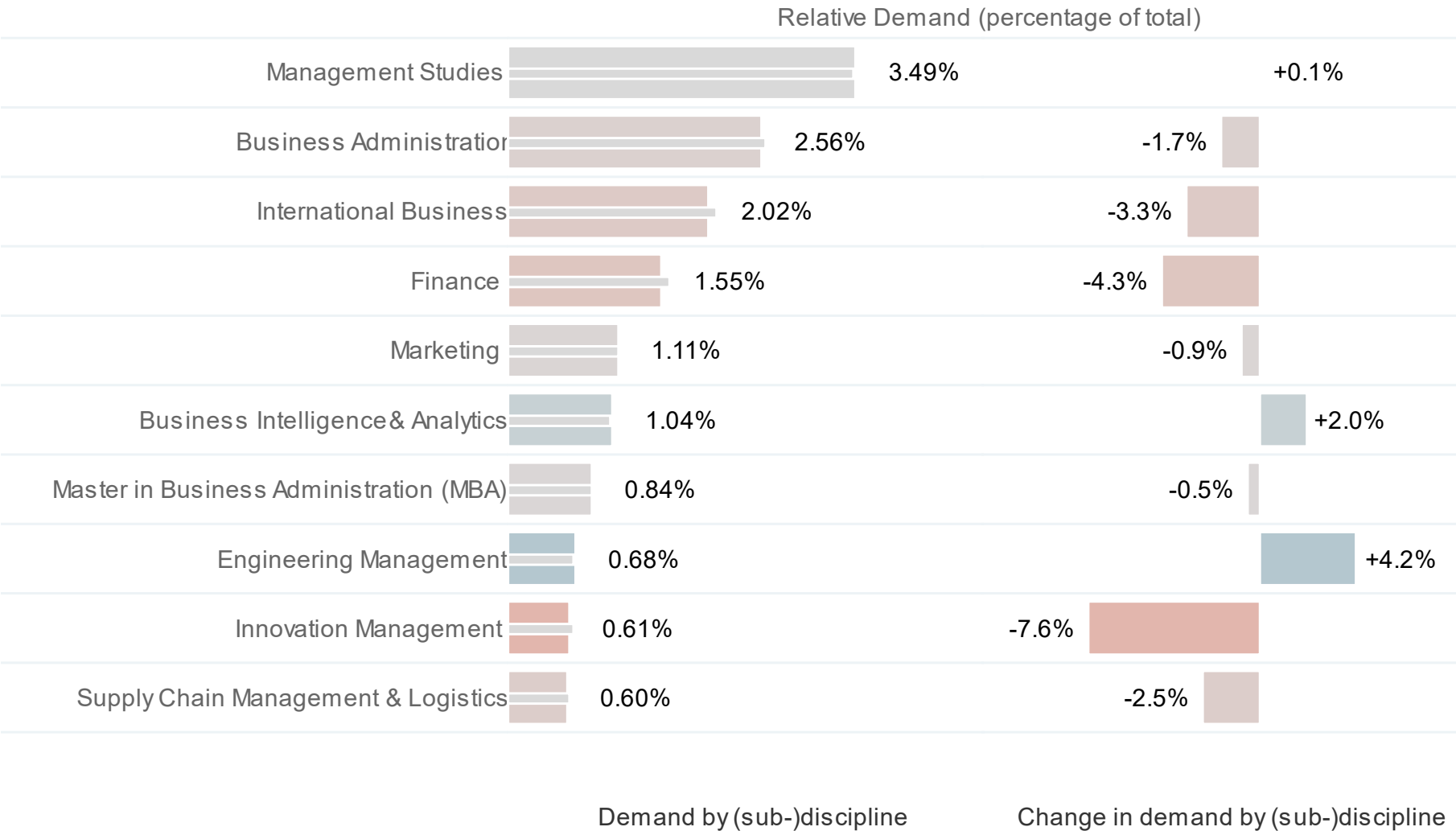
Most popular Sub-disciplines in Business & Management (Bachelor's)



Observing relative demand for the top 10 sub-disciplines at a Bachelor's level, Business Administration, International Business, and Management Studies capture the largest share of interest and have remained relatively stable.

More niche topics such as Business Intelligence & Analytics and Entrepreneurship attract relatively less demand but have surged in popularity, by 19.7% and 22.2% respectively. Meanwhile, interest in a Bachelor's related to Finance and Accounting seems to be declining.

Most popular Sub-disciplines in Business & Management (Master's)



At a Master's level, similar sub-disciplines capture large shares of relative demand.

There is, however, much less variation in the change in interest - except for Innovation Management which experienced a 7.6% decrease in demand. It is also worth noting that Master's programmes related to Engineering Management witnessed the largest increase at 4.5%.

Top 10 destinations for Business in Europe (Bachelor's)

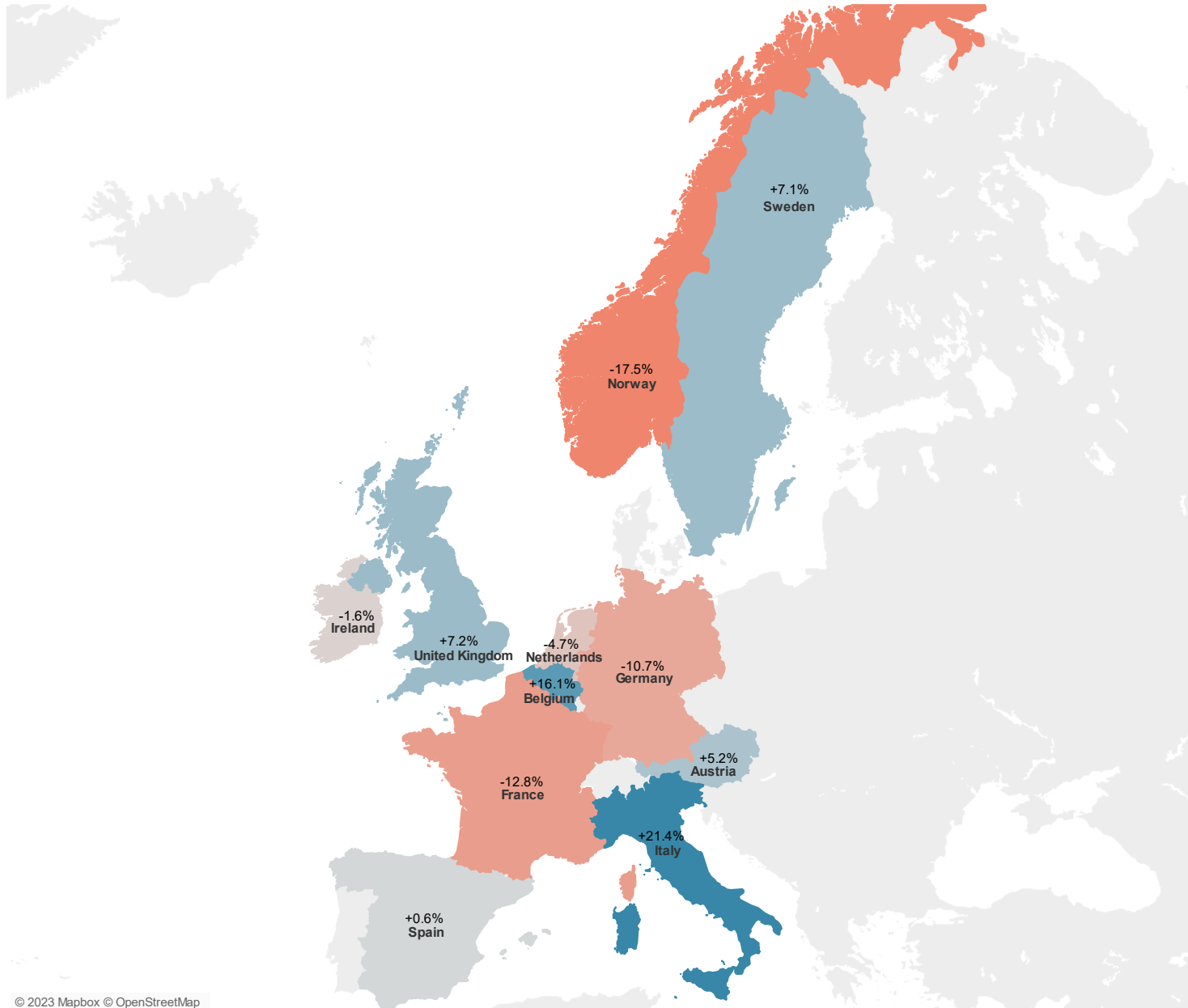


This map shows the top 10 most popular countries to study a Bachelor's programmes in Business, with darker blues revealing stronger year-on-year growth and orange showing a decline.

Amongst the top three countries attracting the most student interest, Germany (13%) has witnessed a decline, followed by the Netherlands (9%) which has remained stable, while Italy (6%) witnessed a substantial increase in interest.

Although the volume of interest in programmes offered in Finland is smaller (positioned in 8th place) interest has grown by more than 60% year on year. Other destinations that saw a moderate growth include Spain, Denmark, and France.

Top 10 destinations for Business in Europe (Master's)



In terms of the volume of interest for Master's programmes in Business, the top three European destinations are Germany, France, and the Netherlands. However, offers in each of these countries experienced a decline (-10.6%, -12.7%, and -4.7%, respectively).

Meanwhile, although Italy attracts 5% of student interest, its Master's programmes in Business have seen the strongest growth over the past 12 months at 21.5%.



Part Four

Conclusion and Methodology

Conclusion

Student interest in Destination Europe is increasing amongst certain key markets like Pakistan and Bangladesh in particular. In an era of increasing globalisation, understanding the trends and preferences of international students has become essential for universities seeking to attract and retain talent from around the world. When interpreting data around market share, it is vital to consider the broader global context.

By leveraging the data insights surrounding student preference for study destinations, disciplines, and sub-disciplines, universities can make informed decisions and identify emerging opportunities. While this report takes a high-level look at Destination Europe, Studyportals can drill down into incredible detail at a country, city, institutional, or even programme level.

Studyportals' data provides another piece of the puzzle for higher education institutions, helping them to further explore how to:

- Diversify their student audience
- Improve their programme performance
- Determine where student demand is directed, and where it may go in the future
- Align their efforts against their main competitors
- And much more

International enrolment datasets

Forecasts

Channel ROI data

Real-time student data

Internal enrolment datasets

Government policy

Supply and demand data

Demographic datasets

Scholarship requirements

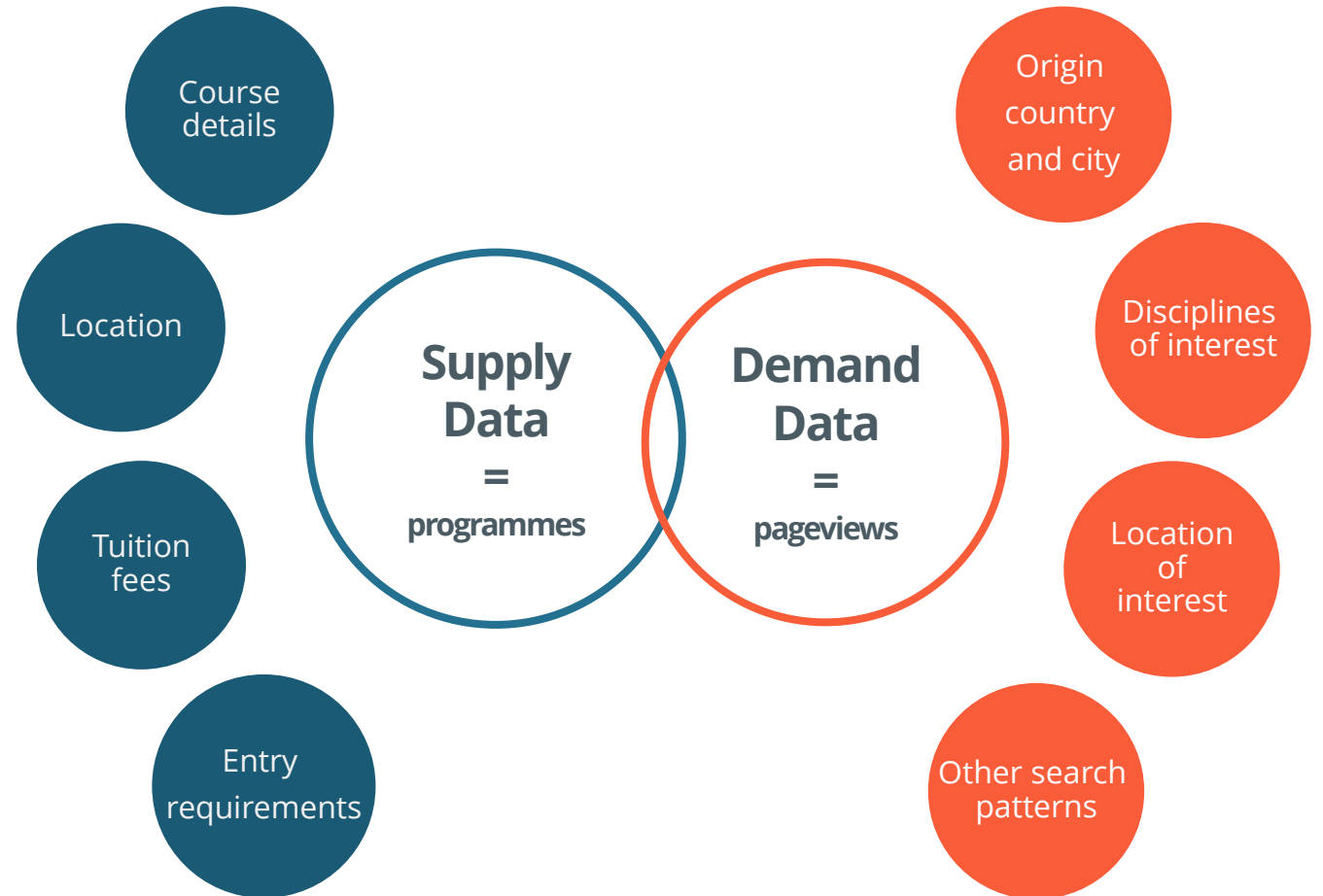
Student surveys

Agent white papers

Visa information

What do we know from the data?

- Countries or regions that generate the most interest
- Student interest trends
- Main competitors (local, regional, global)
- Promising programmes by demand, supply, title, (sub-) disciplines, study method, study level
- A wide variety of other data types



Methodology

The data used for this analysis is based on the supply and demand for on-campus Bachelor's and Master's programmes over the last 12 months (May 2022 –May 2023). It shows the **main study destinations** that supply Bachelor's and Master's programmes, as well as the **origin countries that generated the most absolute student interest** in the last 12 months. **Student interest towards disciplines** is measured over 24 months. Analysing changes in millions of page views over time gives an indication of future growth prospects and emerging trends in student recruitment. A focus on **relative demand** gives an indication of student interest in terms of overall market share. For this analysis we have left out the UK as it is such a large provider of English-taught programmes, and this can skew the data. The UK is better analysed as a market on its own.

With over 50 million unique visitors across our portals per year, we lace together information on the origin of student demand, right down to the city level, the destination of interest, and disciplines. On the supply side, with over 3,500 institutes participating and covering 90% of English-taught programmes globally, we provide data on current offers and insights into competing programmes.

Offline recruitment	Insights rely on online user behaviour.
Under-representation of Chinese users	Restricted internet access and preference for Mandarin-language web offerings on Chinese search engines limit Chinese students' use of Studyportals' websites.
Studyportals-specific trends	Insights in the report are relative comparisons due to the dependence of Studyportals' website pageviews on various internal and external factors.
Difference between interest & enrolments	Although interest is a good indicator for future enrolments, difficulties in obtaining visas or financing can cause discrepancies. It is recommended to use enrolment numbers and additional research to obtain a complete and accurate picture.
Homogenous class sizes	Assuming uniform class sizes in listed programmes, the analysis doesn't account for possible variations in class size among programmes outside the market model.
Representation of universities	Studyportals data covers a substantial portion of global English-taught programmes, including from highly ranked institutions and smaller providers, totaling to 3,750+ institutions.



Ready to grow and diversify your international student enrolments?

Contact us: hello@studyportals.com