

Student interest in English-taught programmes

Trends in the European Higher
Education Area (EHEA)



This report is brought to you by:

Studyportals

We are *the* international study choice platform, hosting over 3,450 universities across 120 countries and reaching more than 52 million prospective students from all around the world in 2021 alone.

Founded as a project subsidised by the European Commission and supported by many international student associations, Studyportals has only grown stronger and more determined each year.

Our mission is to make the world understand the power of learning, and we do this by making education choices transparent and accessible to students worldwide. With our platforms, we enable students to search for programmes and connect with the right universities.

We are dreamers, doers, and former international students ourselves, who have come together from around the world, determined to make one dream happen: to empower the world to choose education.

Introduction

The analysis of student interest in programmes offered in the European Higher Education Area (EHEA) reveals the upcoming study destinations that are growing in popularity. The analysis compares the last 12 months to the preceding 12 months and includes the top-25 countries in terms of the number of pageviews.

The charts showing absolute interest plot changes in the total number of pageviews for each destination. For each country, trends for Bachelor's vs Master's programmes are compared.

The report also looks at how student interest from EEA countries compares to interest from non-EEA countries for each destination to show where the best recruitment grounds are.

Lastly, for selected countries, the report examines the share of student demand captured by capital cities compared to the overall interest for the country as a whole.

Table of contents

Part One

Student interest in the EHEA countries

Part Two

Student interest in capital cities

Part Three

Conclusions

Part Four

Methodology

Student interest in the EHEA countries

Part One

The top 25 destination countries in EHEA were evaluated based on the absolute change in the number of pageviews for on-campus programmes received on [Bachelorsportal](#) and [Mastersportal](#) over the last 12 months (April 2021 – March 2022) compared to the previous 12 months (April 2020 – March 2021).

Moreover, differences in interest from students originating in the EEA (+Switzerland) is compared to student interest from non-EEA countries of origin.

What are the trends in studying in EHEA?

Absolute change

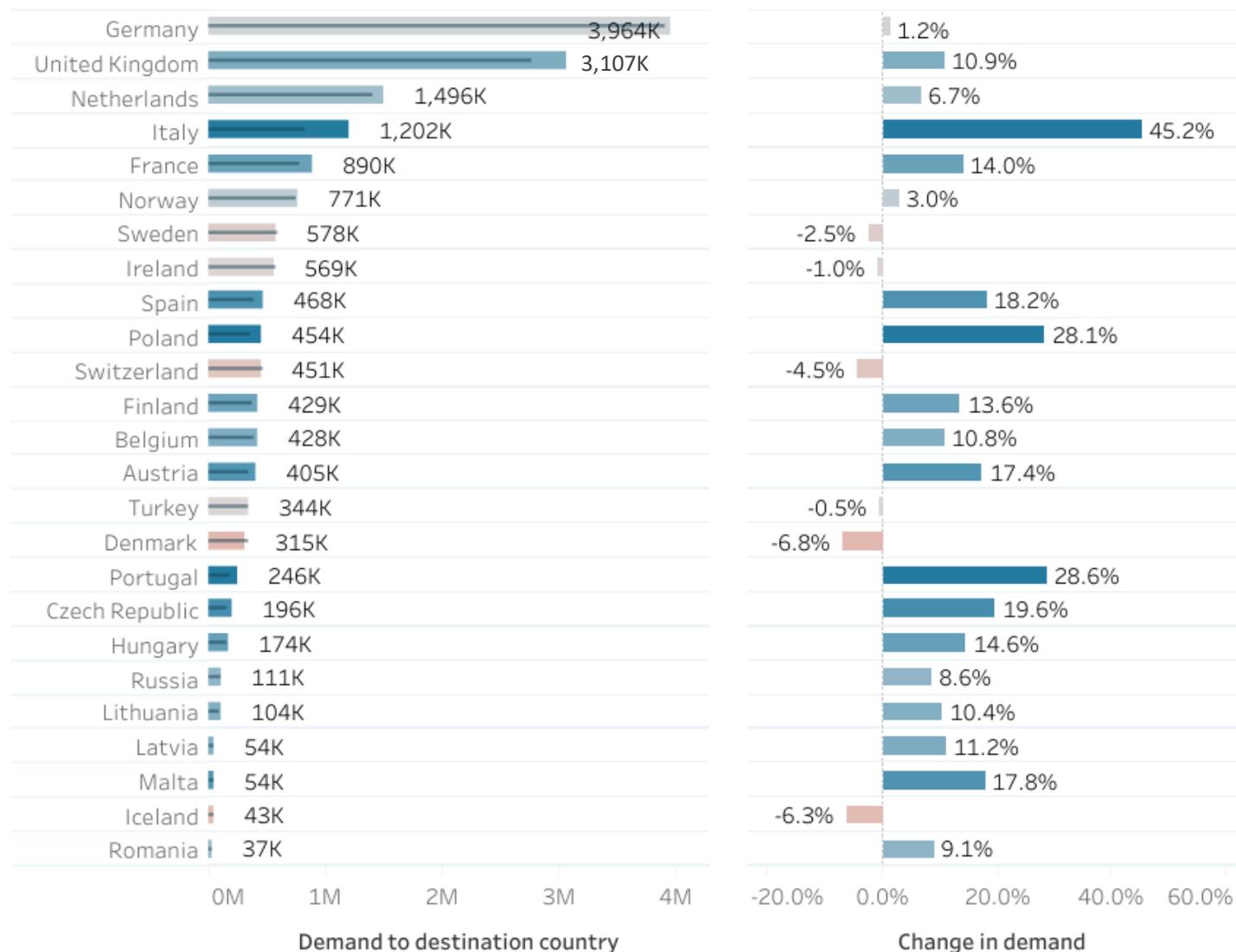
The chart shows the top 25 destination countries in EHEA in terms of pageviews. The left side of the chart depicts demand (in pageviews) over the last 12 months (thick coloured bars) and the previous year (thin grey bars). The absolute change (in %) in demand is shown on the right side of the chart.

Most countries show a general trend of increased interest, indicating that the European Higher Education Area is gaining student interest in absolute terms.

Italy experienced the largest increase in demand (+45.2%), which began in April 2020 and has been increasing ever since. Likewise, Portugal (+28.6%), Poland (+28.1%), Czech Republic (+19.6%), Spain (+18.2%), Malta (+17.8%), Austria (+17.4%), Hungary (14.6 percent), France (+14.0%), and Finland (+13.6%) also saw significant increases in pageviews.

Denmark and Iceland experienced the highest drop in demand (-6.8% and -6.3% respectively). Switzerland (-4.5%), Sweden (-2.5%), Ireland (-1.0%), and Turkey (-0.5%) are also losing student interest.

Destination countries (on-campus Bachelor's and Master's)



Trends for Bachelor's vs Master's programmes

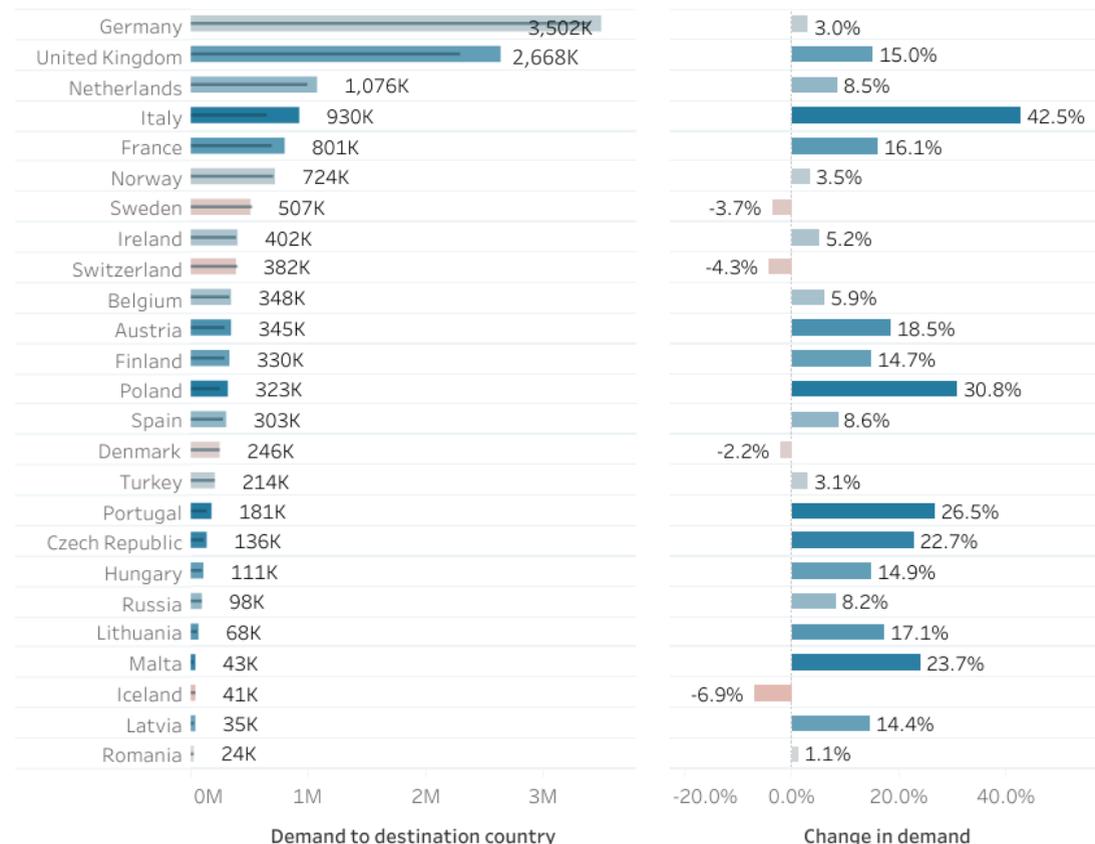
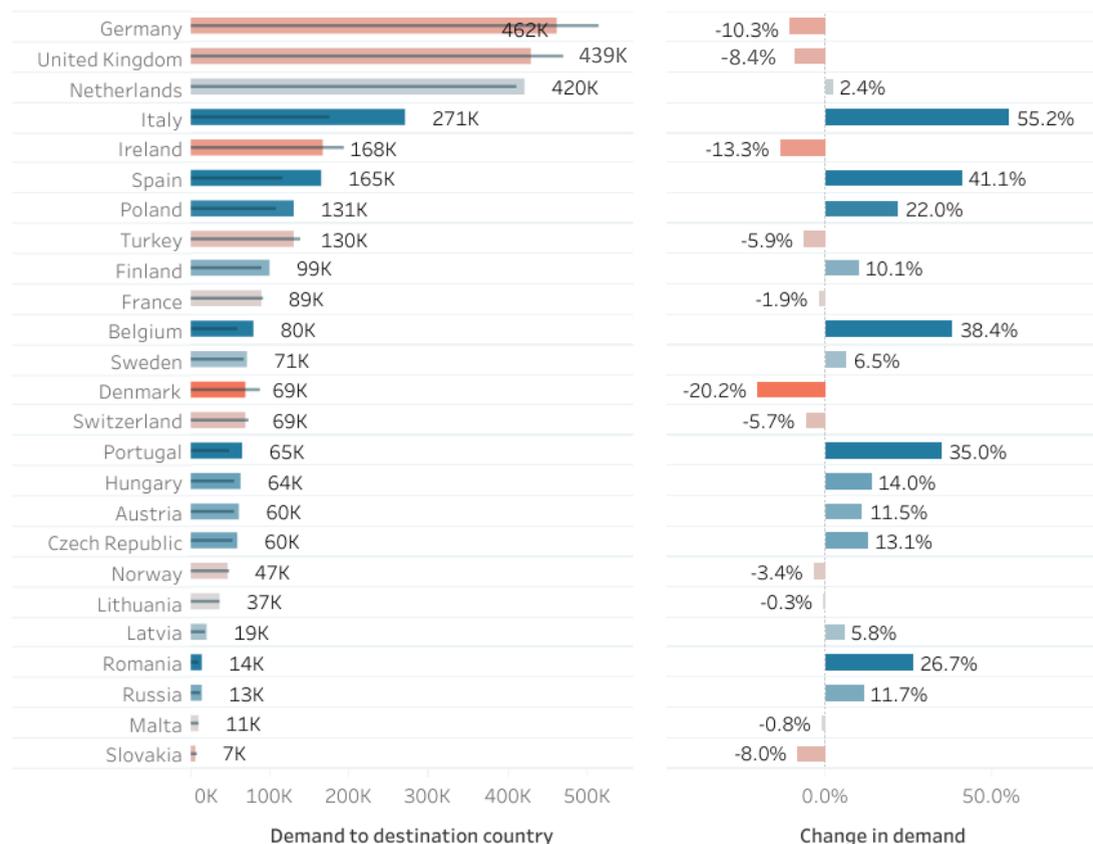
Absolute change

When comparing on-campus Bachelor's and Master's programmes offered in the selected EHEA countries, some differences in trends (in terms of absolute change) can be seen. Germany, for example, gained 1.2% of pageviews when Bachelor's and Master's were considered together, but lost 10.3% of pageviews when Bachelor's were considered alone. There was a 3.0% increase for Master's.

Italy is leading in terms of demand growth for both Bachelor's (+55.2%) and Master's (+42.4%). On the other hand, Denmark is seeing the highest decline in student interest in Bachelor's degrees (-20.2%), whilst for Master's degrees, Iceland has the largest drop in demand (-6.9%).

Destination countries (on-campus Bachelor's)

Destination countries (on-campus Master's)



Differences between EEA and non-EEA origins

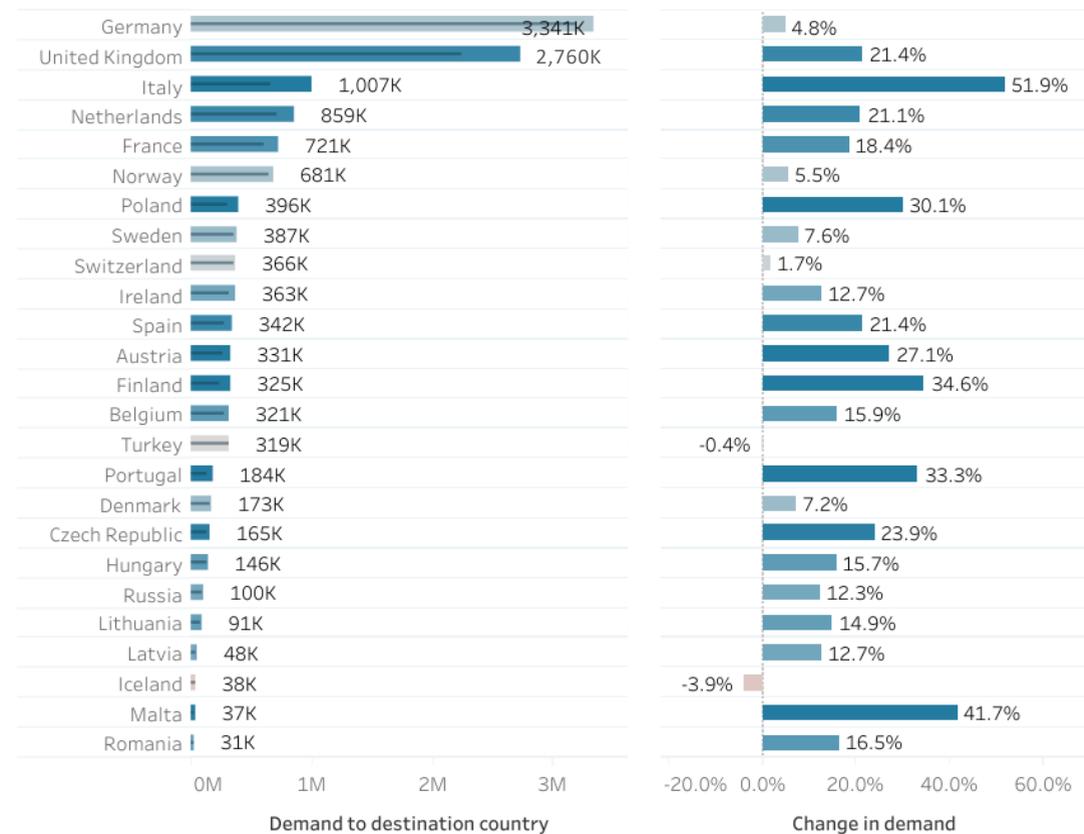
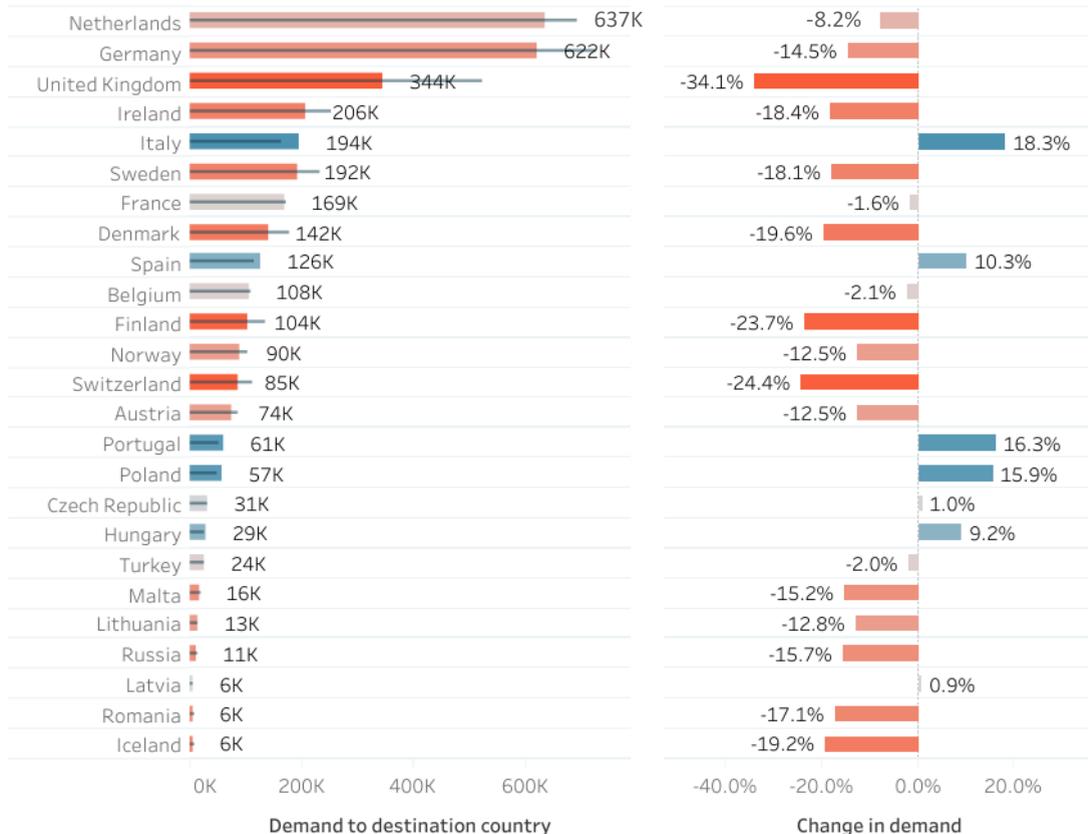
Absolute change

When demand in absolute terms is divided between students from EEA countries and students from non-EEA countries, there is a clear difference in trends, namely the number of pageviews is increasing for non-EEA origin countries while it is mostly decreasing for EEA origin countries. The countries that experienced the biggest drop in the number of pageviews originating from the EEA are the United Kingdom (-34.1%), Switzerland (-24.4%), and Finland (-23.7%). Only Italy (+18.3%), Portugal (+16.3%), Poland (+15.9%), Spain (+10.3%), Hungary (+9.2%), Czech Republic (+1.0%), and Latvia (+0.9%) have experienced an increase in absolute demand.

For non-EEA origins, only Iceland (-3.9%) and Turkey (-0.4%) had a decline in pageviews, while other destinations had growth, with Italy (+51.9%), Malta (+41.7%), and Finland (+34.6%) experiencing the biggest increase in demand.

Destination countries
(origin: EEA countries)

Destination countries
(origin: non-EEA countries)



Student interest in capital cities

Part Two

While it is interesting to know which countries in EHEA are gaining or losing student interest - what percentage of country interest is directed toward capital cities?

For selected countries, the share of demand for on-campus programmes directed toward capital cities, will be compared to that of the rest of the country.

Capital cities vs rest of the country

The table on the right side shows the percentage of pageviews directed towards programmes offered in capital cities in the last 12 months (April 2021 – March 2022) and in the previous 12 months (April 2020 – March 2021) as well as the percentage point (pp) change.

In the last 12 months, universities in capital cities captured 23.5% of pageviews on average in the selected countries. In the previous 12 months, this average was 23.2%.

Some countries have a greater proportion of pageviews in their capital cities. These destinations include Iceland (92.8% of pageviews go to programmes in Reykjavík), Latvia (74.1%), the Czech Republic (62.2%), Portugal (53.1%), and Ireland (52.8%). However, not all countries' capital cities are hubs of student activity. In Switzerland, for example, only 7.9% of pageviews are attracted by programmes offered in Bern, whilst Zürich attracts the most student interest.

The largest year-on-year increase was observed in Vienna, Austria, where the difference was +9.9 percentage points. The largest year-on-year decrease, on the other hand, was observed in Bucharest, Romania, where the change was -16.0 percentage points.

Destination countries (on-campus Bachelor's and Master's)

Country	Capital City	% of total pageviews		
		April 2020 – March 2021	April 2021 – March 2022	Change
Austria	Vienna	38.8%	48.7%	+9.9 pp
Belgium	Brussels	29.8%	26.8%	-3.0 pp
Czech Republic	Prague	65.2%	62.2%	-3.0 pp
Denmark	Copenhagen	45.3%	39.7%	-5.6 pp
Finland	Helsinki	47.0%	45.6%	-1.4 pp
France	Paris	23.9%	24.5%	+0.6 pp
Germany	Berlin	10.9%	13.4%	+2.5 pp
Hungary	Budapest	43.4%	40.1%	-3.3 pp
Iceland	Reykjavík	89.8%	92.8%	+3.0 pp
Ireland	Dublin	50.2%	52.8%	+2.6 pp
Italy	Rome	11.0%	11.2%	+0.2 pp
Latvia	Riga	75.3%	74.1%	-1.2 pp
Lithuania	Vilnius	49.3%	48.4%	-0.9 pp
Malta	Valletta	0.0%	0.0%	-
Netherlands	Amsterdam	17.0%	17.8%	+0.8 pp
Norway	Oslo	28.4%	29.7%	+1.3 pp
Poland	Warsaw	37.0%	30.6%	-6.4 pp
Portugal	Lisbon	47.4%	53.1%	+5.7 pp
Romania	Bucharest	50.5%	34.5%	-16.0 pp
Russia	Moscow	30.6%	31.0%	+0.4 pp
Spain	Barcelona	42.3%	43.2%	+0.9 pp
Sweden	Stockholm	25.4%	20.2%	-5.2 pp
Switzerland	Bern	9.3%	7.9%	-1.4 pp
Turkey	Ankara	24.6%	25.7%	+1.1 pp
United Kingdom	London	20.1%	18.5%	-1.6 pp

Conclusions

Part Three

Student interest in programmes offered in the European Higher Education Area (EHEA) depends on the type of programme (Bachelor's vs Master's) as well as the origin of students (EEA vs non-EEA). Capital cities are attracting a significant proportion of student demand; however, the percentage varies on a country-by-country basis.

Conclusions

Overall, there has been a growth in the absolute number of pageviews attracted by programmes offered in the European Higher Education Area. Destination countries seeing the highest growth in recent years are Italy, Portugal, and Poland. For Denmark, Iceland, and Switzerland, the share of total pageviews significantly decreased.

Once again, Italy has the highest change in absolute terms for Bachelor's programmes, followed by Spain and Belgium. For Master's programmes, Italy is also leading, followed by Poland and Portugal.

There has been mostly a decrease in the number of pageviews coming from the EEA countries, whereas for the non-EEA origins, the change was largely positive. EEA students seem to be mostly losing interest in the United Kingdom, Switzerland, and Finland, but gaining interest in Italy, Portugal, and Poland. Italy is also becoming more popular among non-EEA students, along with Malta and Finland, while Iceland and Turkey are decreasing in popularity.

While capital cities attract a sizable share of student interest, this proportion varies by country, with Iceland, Latvia, and the Czech Republic having the highest share of pageviews in capitals. On average, 23.2% of pageviews were captured by the universities in capital cities in the last 12 months. The year-on-year changes show that Vienna, Austria gained the biggest share in terms of percentage points, whereas the proportion of interest for Bucharest compared to Romania as a whole, fell the most.

Methodology

Part Four

The analysis was done based on pageviews received on Bachelorsportal and Mastersportal over the last 12 months (April 2021 – March 2022) compared to the previous 12 months (April 2020 – March 2021). Only on-campus programmes were taken into consideration.

Methodology

The foundation of this analysis is based on anonymous behavioural data that has been captured from users on the Studyportals' websites since 2013. This dataset is uniquely large, based on over 52 million users, covering more than 120 countries. These visitors generate more than 200 million programme pageviews annually. This large amount of information has been cleaned, validated and organised.

As Studyportals is only operating one English-language platform and no country-specific websites, visitors are well-distributed across the entire globe, providing a reliable representation of an international pool of (potential) students interested in English-taught education. Currently, about 97% of Studyportals' website traffic comes from organic sources such as Google searches, capturing the global interest as it emerges.

Our database contains programme-level information and currently comprises more than 200,000 individual courses, making Studyportals the largest platform for English-taught education on a global scale. According to our estimates of the total market size, this covers more than 90% of all English-taught programmes in Europe that are open to international students.

How we can help you

Studyportals

Extend your potential reach to every corner of the world, inspiring ambitious students to apply and enrol no matter where they're from. Strengthen the diversity and high educational value that are already part of your institution

We offer multiple services and solutions to optimise your recruitment funnel for international students. From raising your exposure and brand awareness, to increasing traffic and leads from a specific country, to growing your number of applications and enrolments – every promotion with Studyportals is different and tailored to your goals and needs

Our results-based channels help universities and other providers with marketing and international student recruitment, by enabling you to reach a global audience and diversify your student population.

If you are interested in increasing the number of student applications and enrolments, to highlight your programmes and products to a global audience, Studyportals is the place to be.

Ready to grow and diversify your international student enrolments?

Contact us: hello@studyportals.com

 studyportals