Student mobility and motivation:

Europe

Inbound and outbound student perceptions

Powered by the QS International Student Survey and Global Student Flows

2026

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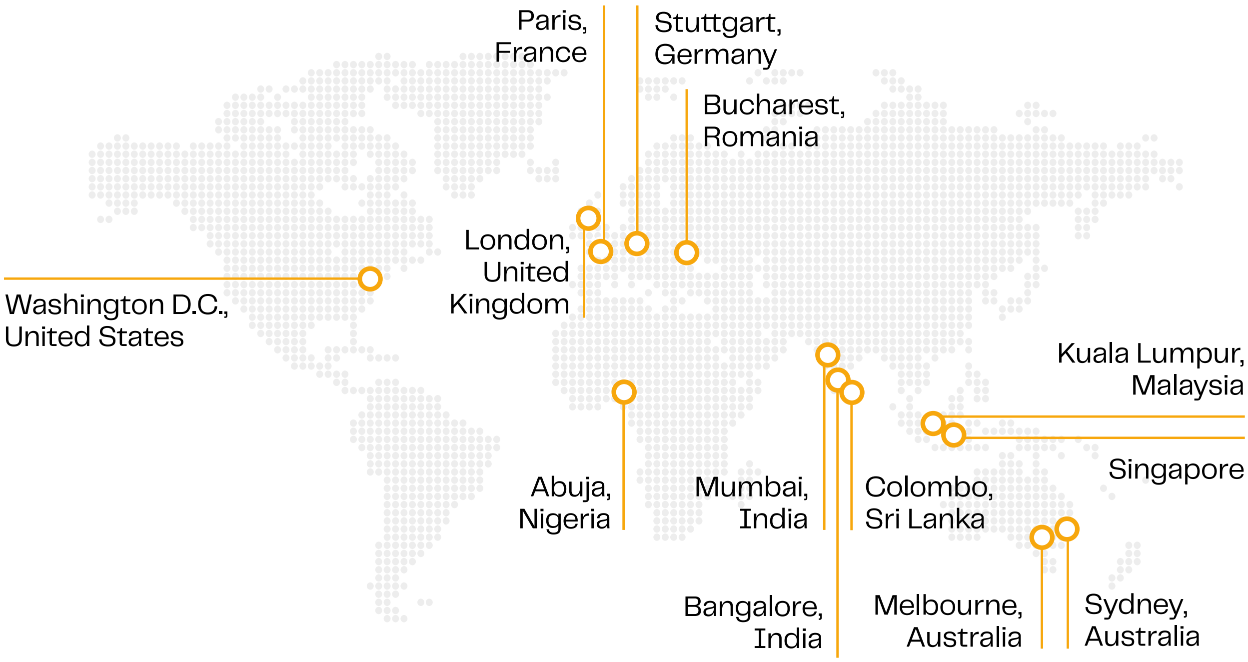

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Foreword

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International student demand for Europe remains strong, but the decision-making journey has become harder to predict. Students still want high-quality teaching, trusted qualifications and a positive destination experience, but they are also weighing affordability, response times, personal recommendations and the practical realities of studying abroad more closely.

That matters for European institutions and for universities recruiting European students. Europe has many advantages: academic breadth, cultural appeal, international recognition and a strong sense of value. But students now compare options quickly and across many channels. A university's reputation may bring a student into the conversation, but clear information, credible proof points and timely communication can be what keeps them there.

This report combines QS International Student Survey insight with Global Student Flows forecasting to show how mobility patterns and student motivations are developing across Europe. It looks at where demand is likely to come from, what students want to study, which messages influence them, and how institutions can build stronger connections from first interest through to enrolment.

The institutions best placed to benefit will be those that treat student insight as a practical recruitment tool: using it to sharpen subject positioning, improve communication and make every stage of the student journey feel more relevant, responsive and reassuring.

Turn insights into recruitment results

Find, engage and recruit more of your ideal students

How we can help:

- Make confident market decisions
- Strengthen your recruitment pipeline
- Increase admissions resilience
- Convert interest into enrolments

1,500+
universities worldwide trust us to grow and diversify their student cohorts

14,000+
compliance checks delivered over the past five years

50,000+
students engaged through QS recruitment events

Discover what's possible with QS

Explore our student recruitment solutions

Europe: Market overview

Inbound mobility trends

We forecast that Europe's role in the international student market will increase. International enrolments in the region are projected to grow by about 5% per year to 2030. While this is slower than the 7% annual pace recorded between 2000 and 2024, it remains faster than the 'Big Four' study destinations.

Figure 1. Top 20 source countries to Europe, 2024–2030F

Country	2024 Rank	2024 Flow	2030 Rank	2030 Flow	2024 – 2030 CAGR	Lower to Upper Confidence Interval – CAGR Spread	
India	2	139K	1 ▲	275K	12.1%	-3%	17%
Uzbekistan	3	135K	2 ▲	206K	7.3%	-5%	12%
China	1	158K	3 ▼	199K	3.9%	-5%	10%
Syria	5	92K	4 ▲	134K	6.6%	-8%	15%
Ukraine	6	81K	5 ▲	121K	6.9%	-3%	11%
Germany	4	106K	6 ▼	117K	1.6%	-3%	6%
Iran	9	66K	7 ▲	97K	6.5%	-8%	15%
France	7	77K	8 ▼	96K	3.8%	-3%	9%
Kazakhstan	8	73K	9 ▼	90K	3.6%	-4%	7%
Italy	10	65K	10	86K	4.7%	-4%	8%
Pakistan	18	36K	11 ▲	76K	13.4%	-6%	19%
Morocco	11	60K	12 ▼	73K	3.4%	-4%	9%
Egypt	14	47K	13 ▲	72K	7.3%	-5%	15%
Turkmenistan	12	53K	14 ▼	58K	1.6%	-4%	6%
Azerbaijan	15	46K	15	54K	2.7%	-4%	8%
Russia	13	48K	16 ▼	53K	1.9%	-5%	7%
Türkiye	16	43K	17 ▼	52K	3.5%	-6%	7%
Brazil	19	36K	18 ▲	51K	6.3%	-4%	10%
Tajikistan	17	37K	19 ▼	49K	4.9%	-3%	8%
Iraq	23	27K	20 ▲	45K	9.0%	-7%	18%

- 10% -5% 0% 5% 10%

Source: QS Global Student Flows, September 2025

Outbound mobility trends

Outbound student mobility from Europe has followed a long-term upward trend, supported by programmes such as Erasmus+ and driven by students seeking high-quality teaching, attractive lifestyles, career opportunities and language development. Western Europe remains the largest source region with most students continuing to study elsewhere in Europe, although Brexit has made the UK a more expensive option for EU students. Looking ahead, further growth will depend on widening access, strengthening links between mobility and employability, and helping the EU move towards its target of 23% of graduates gaining study abroad experience by 2030.

Read more in Global Student Flows: Europe

Executive summary

Europe is forecast to remain one of the most resilient regions in international student mobility, with inbound enrolments projected to grow by around 5% per year to 2030. This growth is slower than the region's long-term pace since 2000, but still stronger than the projected trajectory for the 'Big Four' destinations. Europe's appeal is anchored in academic quality, welcome, affordability and proximity, but students' choices are becoming more practical, channel-led and time-sensitive.

For inbound students considering Europe, Business and Management remains the leading subject area, followed by Engineering and Technology and Computing. Decision-making is led by perceptions of welcome, high-quality teaching and affordability. Official university websites remain the dominant information source, but students are relying on a broader mix of search, social media, education agents and peer-style sources. Speed also matters: 88% expect a complete and personalised enquiry response within one week or less, and two-thirds expect an application outcome within the same period.

European students looking to study abroad are motivated most strongly by culture and lifestyle, high-quality teaching and destination reputation. Their subject interests remain professionally aligned, with Business and Management still leading, while Medicine and Dentistry has grown most clearly since 2022. These students are also placing greater weight on personal validation, including family, friends, social media and online forums, alongside official institutional channels.

The strategic implication is that institutions cannot rely on broad destination appeal alone. Growth will depend on sharper subject-level positioning, clearer value messaging, faster and more personalised communication, and stronger use of the channels students trust most. Institutions that connect market intelligence with responsive recruitment practice will be better placed to convert demand into enrolments.

Inbound trends

What do Europe-bound students want from institutions?

Europe inbound trends at a glance

Excluding UK

What do students seeking study in Europe want?

Top decision drivers in 2026

56%
Welcoming to international students

49%
High-quality teaching

44%
Affordable cost of studying

43%
Affordable cost of living

Fastest-rising factors since 2022

- Language skills +4%
- Proximity to home +3%
- Education agents +5%
- Recommended to me +4%

What do they want to study?

Top subjects in 2026

#1
Business and Management 20%

#2 Engineering and Technology 18%

#3 Computing 12%

#4 Medicine and Dentistry 8%

How quick do students expect responses?

88% expect a complete and personalised enquiry response within one week or less

66% expect an application outcome within one week or less

26% are prepared to wait up to one month for an application outcome

8% are prepared to wait up to three months

Most influential information sources

73% Official university website

60% General online search

47% Social media channels

41% Institution information sessions / university fairs

Subject-level interest

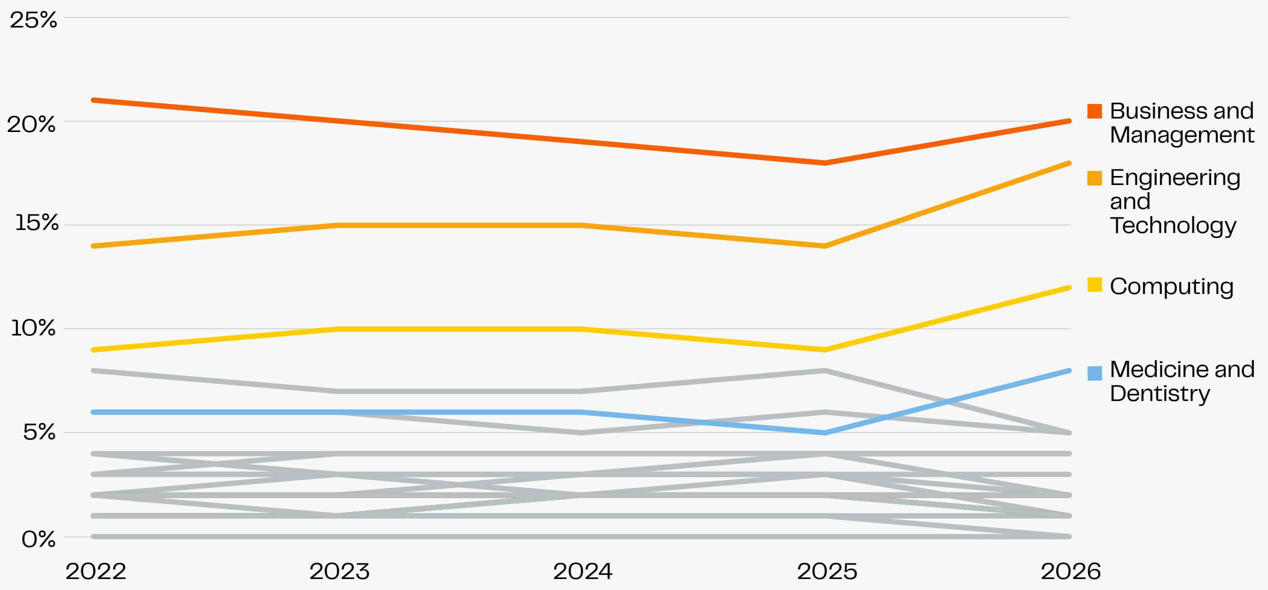
Business and Management remains the most popular subject for students looking to study in Europe, though Engineering and Technology's recent rise may see the subject reach top spot by 2030. After relative stability since 2022, Computing has seen a noticeable uptick in interest this year; Medicine and Dentistry sees a similar story.

Beyond the leading subject areas, student interest remains relatively dispersed. No other field attracts more than 8% of Europe-bound prospects in 2026, with most subjects continuing to sit within a narrow single-digit range. This suggests that demand remains concentrated in professionally aligned subjects, but growth is uneven rather than broad-based across the full subject mix.

Key questions to consider:

- Does your application pipeline align with these subject choices?
- Are you tailoring your marketing to meet clear student subject demands?
- Do your subject-level marketing messages align to the factors they deem important?

Figure 2. European inbound trends: What do Europe-bound students want to study?



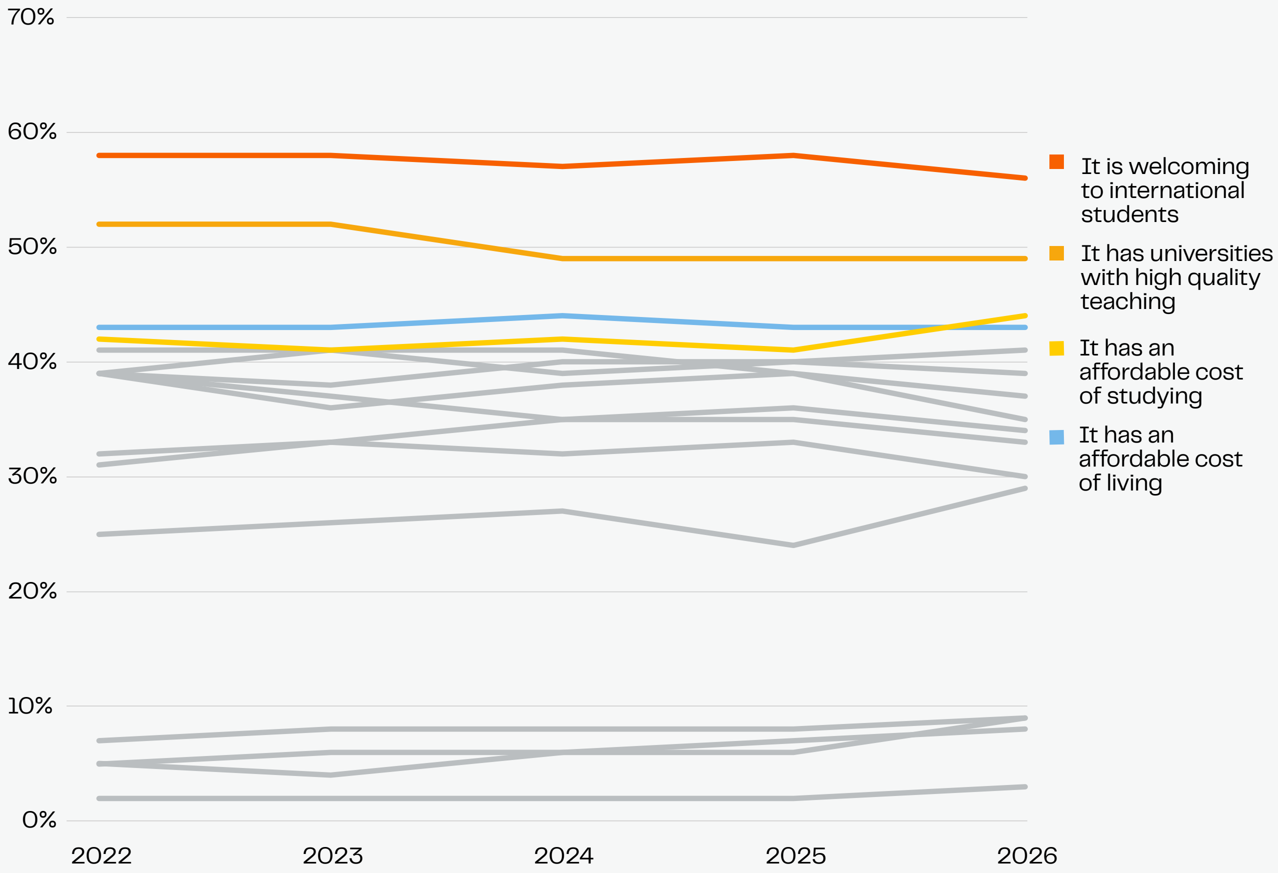
Source: QS International Student Survey

What drives inbound mobility?

Students considering Europe continue to prioritise a mix of academic quality, welcome and practical affordability when choosing a country. In 2026, the strongest driver is that Europe is seen as welcoming to international students, selected by 56% of respondents, followed by high-quality teaching at 49%, affordable cost of studying at 44%, affordable cost of living at 43%, and a strong reputation as a place to study at 41%. While most top factors have remained relatively stable since 2022, there are signs of shifting priorities, with affordable study rising slightly, language development has increased from 25% to 29%, and proximity to home has climbed from 5% to 8%. By contrast, post-study work visa appeal has fallen from 39% to 35%, and graduate employment options have softened from 39% to 34%.

Overall, Europe's inbound proposition remains anchored in quality, welcome and value, but the fastest-growing factors point to more practicality and accessibility. Students are still attracted by Europe's academic strengths and reputation, yet affordability, language development and geographic proximity are becoming more visible parts of the mobility story.

Figure 3. European inbound trends: Important factors when choosing a country



Source: QS International Student Survey

Key questions to consider:

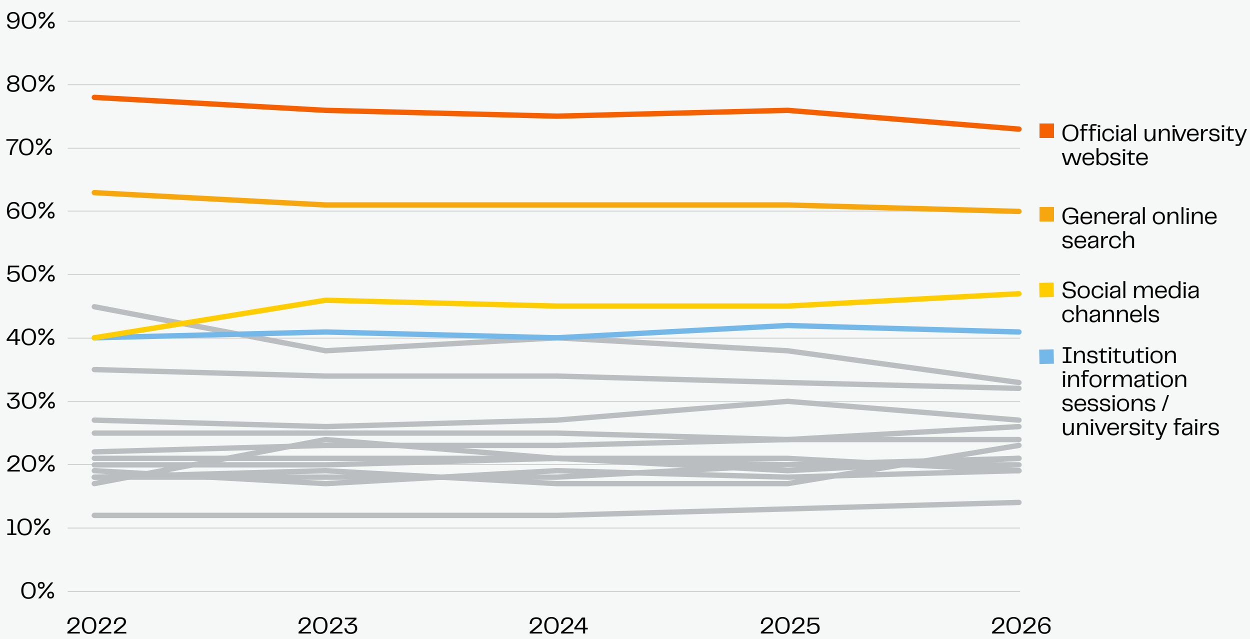
- Are you leading with Europe's strongest appeal points?
- Is affordability clear in your messaging?
- Are you reassuring students on careers and post-study work?
- Are you tailoring messages by source market?

The sources inbound students use to find information about Europe

Europe-bound students continue to rely most heavily on institution-owned and search-led channels when researching study options. The official university website remains by far the most widely used information source, cited by 73% of respondents in 2026, although this has fallen from 78% in 2022. General online search also remains highly influential at 60%, while social media channels now sit at 47%, making them the third most-used source. Institution information sessions and university fairs remain stable and important, used by 41% of students in 2026.

The most notable shift is the declining influence of rankings, which have fallen from 45% in 2022 to 33% in 2026. This does not mean rankings are no longer important, but it suggests students are drawing on a broader mix of sources when evaluating Europe as a study destination. At the same time, social media has increased from 40% to 47%, and education agents have risen from 18% to 23%, pointing to a more distributed decision journey where institutional content, digital discovery, third-party advice and peer-style engagement all play a role.

Figure 4. European inbound trends: Top sources of information



Source: QS International Student Survey

Key questions to consider:

- Is your website converting interest effectively, especially from high growth markets like India, Uzbekistan and China?
- Is your international search engine optimisation effective?
- Are you using student and alumni voices effectively to build trust across the channels students rely on most?

Student conversion and communication

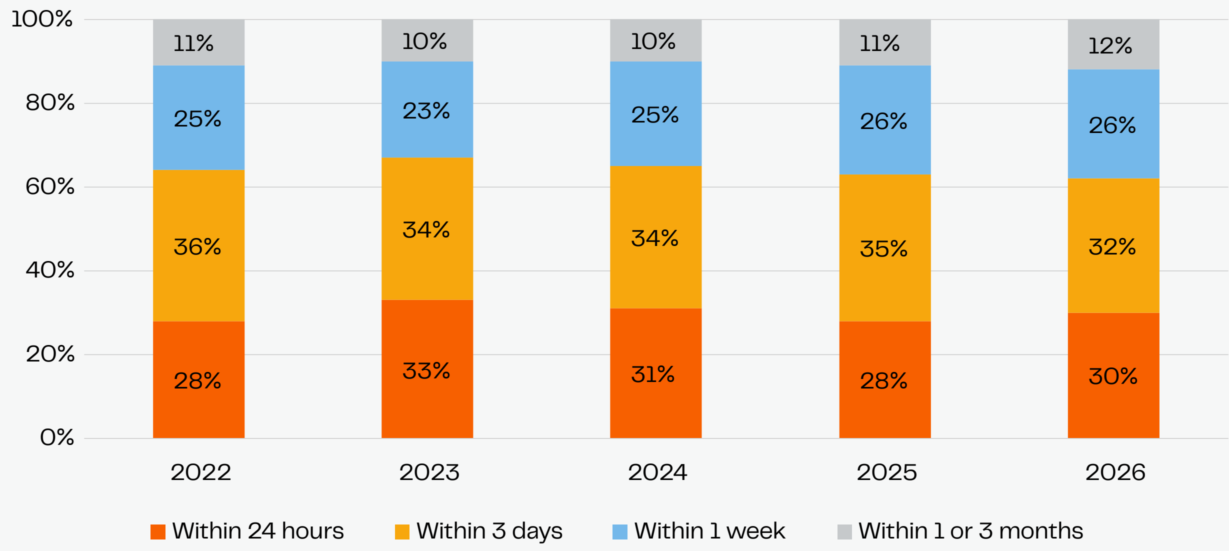
Europe-bound students expect universities to respond quickly at the enquiry stage. In 2026, 30% expect a complete and personalised response within 24 hours, while a further 32% expect one within three days. Overall, 88% expect a response within one week or less. These expectations have remained broadly stable since 2022, suggesting that fast, personalised enquiry handling is now a baseline requirement rather than a differentiator.

Students are more flexible when waiting for application outcomes, but expectations are still relatively compressed. In 2026, 21% expect to be notified within 24 hours, 19% within three days and 26% within one week, meaning two-thirds expect an outcome within a week or less. The share willing to wait up to one month has fallen from 32% in 2022 to 26% in 2026, while only 8% are prepared to wait up to three months. This points to a student journey where timely communication matters throughout, not only at the first point of enquiry.

Key questions to consider:

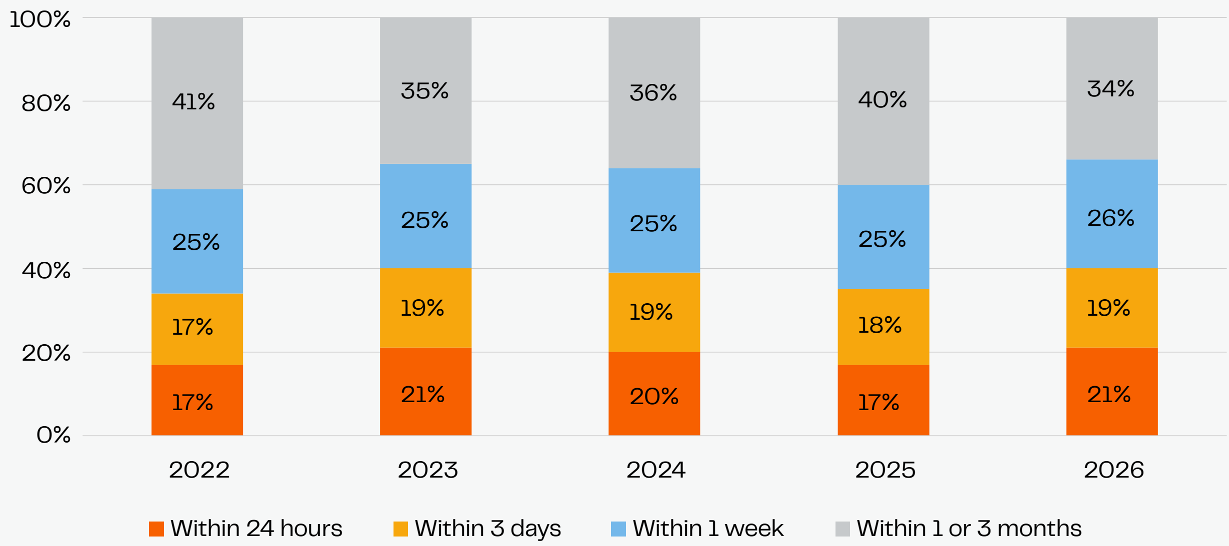
- Are enquiries answered quickly enough?
- Are responses personalised, not just prompt?
- Are application updates keeping students engaged?

Figure 5. Inbound trends: Expected response time for an enquiry



Source: QS International Student Survey

Figure 6. Inbound trends: Expected time for application outcome notification



Source: QS International Student Survey

Outbound trends

What do European students want from global institutions?

At a glance

What do European students seeking study overseas want?

Top decision drivers in 2026

59%
Culture and lifestyle

54%
High-quality teaching

49%
Strong reputation as a place to study

44%
Strong reputation as a place to study

Fastest-rising factors since 2022

- Recommended to me +5%
- Friends or family living there +5%

What do they want to study?

Top subjects in 2026

#1

Business and Management 21%

#2 Medicine and Dentistry 10%

#3 Engineering and Technology 9%

#4 Social Sciences 9%

Fastest-rising subject area

- Medicine and Dentistry +6%

How do they make decisions?

Most influential information sources in 2026

79% Official university website

71% General online search

48% University rankings

38% Social media channels

36% Family and friends

Biggest information-source shifts since 2022

▲ Family and friends +8%

▲ Social media channels +7%

▼ University rankings -8%

▼ Course-finder websites -10%

How quick do students expect responses?

81% expect a complete and personalised enquiry response within one week or less

39% expect an application outcome within one week or less

40% expect an application outcome within one month

22% are prepared to wait up to three months

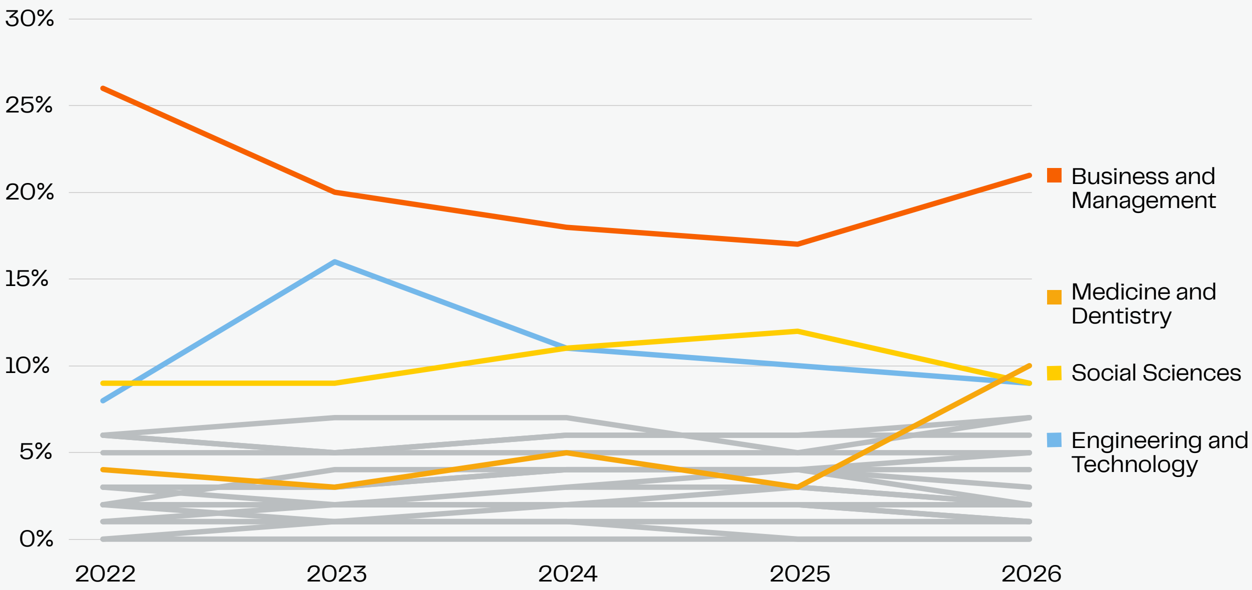
Subject level interest

European outbound subject interest remains led by professionally aligned fields, but the mix has shifted noticeably since 2022. Business and Management is still the top subject in 2026, attracting 21% of prospective students, although this is below its 2022 level of 26%. After several years of decline, its rebound from 17% in 2025 suggests demand has strengthened again, even if it is no longer as dominant as it was at the start of the period.

Beyond Business and Management, interest is more evenly spread. Medicine and Dentistry records the clearest rise, increasing from 4% in 2022 to 10% in 2026, making it the second-largest subject area. Computing has also strengthened, rising from 6% to 7%, after dipping to 5% in 2025, while Law has moved from 6% to 7%.

The biggest decline is in Engineering and Technology, which peaked at 16% in 2023 but has fallen steadily to 9% in 2026. It remains one of the most important outbound subject areas, but has been on a downward trend since 2023. Social Sciences has fluctuated, rising to 12% in 2025 before returning to 9% in 2026, broadly in line with its 2022 level.

Figure 7. European outbound trends: What do European students want to study abroad?



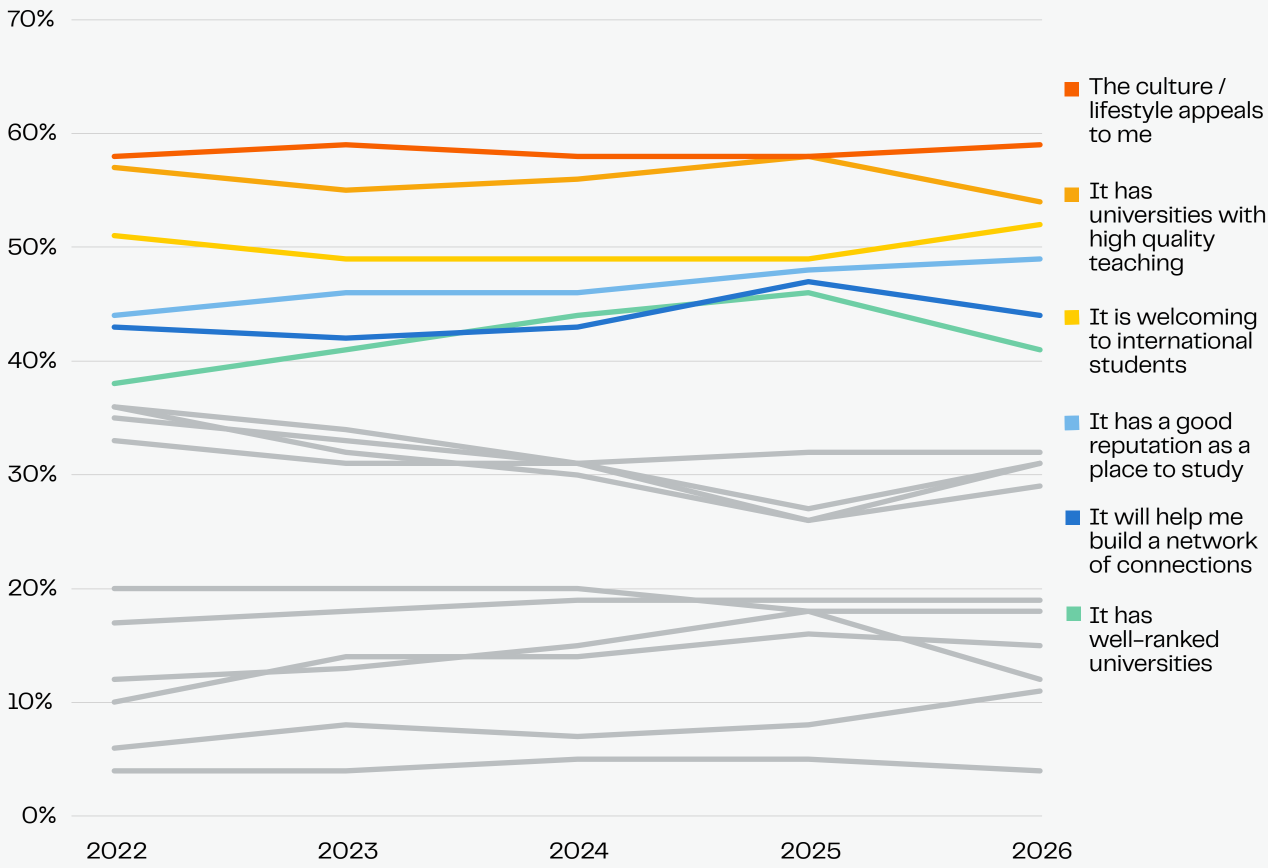
Source: QS International Student Survey

Key questions to consider:

- Does your programme portfolio reflect European demand?
- Are you responding to rising healthcare interest?
- Are your subject messages based on current demand?

What drives outbound mobility?

Figure 8. European outbound trends: Important factors when choosing a country



Source: QS International Student Survey

For European outbound students, destination choice continues to be led by a combination of lifestyle appeal, academic quality and reputation. In 2026, the culture and lifestyle of a destination is the most influential factor, selected by 59% of respondents and remaining consistently high across the five-year period. High-quality teaching also remains a major driver, although it has dipped from 58% in 2025 to 54% in 2026. Meanwhile, a destination's reputation as a place to study has strengthened steadily, rising from 44% in 2022 to 49% in 2026, making it one of the clearest long-term gains.

Affordability remains important, but less so when compared with 2022. The share of students citing affordable cost of living fell from 36% in 2022 to 29% in 2026, while affordable cost of studying declined from 35% to 31%, despite both recovering slightly from their 2025 lows. This suggests cost still matters, but is not the only factor shaping European outbound decision-making. Students appear to be weighing affordability alongside destination experience, teaching quality, reputation and personal development.

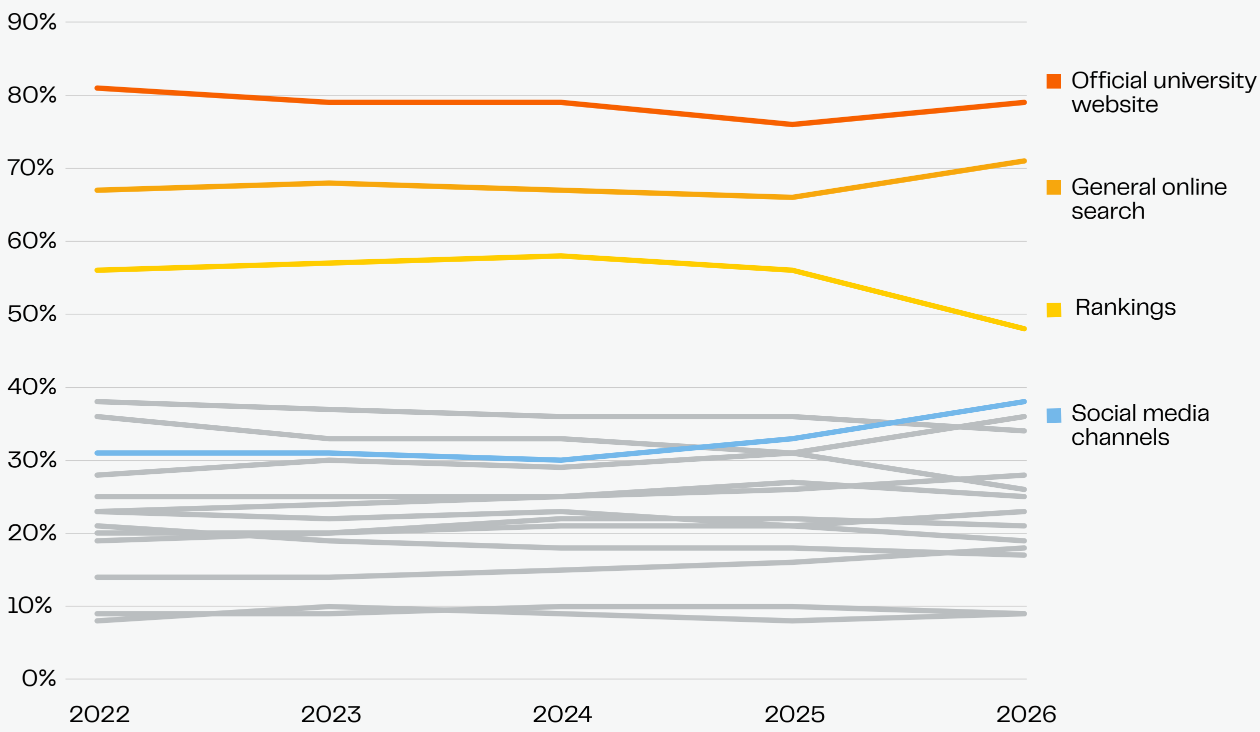
The biggest risers point to a more socially influenced and reputation-led decision journey. Being recommended to study in a destination has almost doubled, from 6% in 2022 to 11% in 2026, while having friends or family living there has increased from 10% to 15%. The importance of building a network of connections has also grown, reaching 44% in 2026, up from 43% in 2022 and close to its 2025 peak of 47%.

Key questions to consider:

- Is your destination experience clearly differentiated?
- Are reputation and teaching quality leading your message?
- Are you using social proof to build confidence

The sources of information students use to make decisions

Figure 9. European outbound trends: Top sources of information



Source: QS International Student Survey

European outbound students continue to rely most heavily on digital discovery and institution-owned channels when researching study options. The official university website remains the most widely used information source, cited by 79% of respondents in 2026, while general online search has strengthened to 71%, its highest level across the five-year period. This reinforces the importance of a clear, findable and conversion-focused digital presence, particularly for students comparing options across multiple countries and institutions.

The most notable shift is the growing role of personal and social validation. Family and friends has risen from 28% in 2022 to 36% in 2026, making it the fifth most-used source this year. Social media channels have also increased from 31% to 38%, while online forums and chat rooms have grown from 23% to 28%. European outbound students are increasingly using informal, peer-led and conversational sources to test confidence in their choices, alongside official institutional information.

At the same time, some more traditional or structured sources appear to be losing influence. Rankings remain important, but have fallen sharply from 56% in 2022 to 48% in 2026. Course-finder websites have also declined from 36% to 26%, while printed prospectuses have continued to soften, moving from 21% to 17%. Institution information sessions and university fairs remain relevant at 34%, but have gradually decreased over time.

Key questions to consider:

- Is your official website working hard enough as a central conversion hub?
- Beyond the university's own voice, how are you building trust among key stakeholders?
- Admissions staff are a useful information source for a quarter of European students. Are those teams used as a strategic nurture channel, not just a service function?

Student conversion and communication

European outbound students expect universities to respond quickly at the enquiry stage. In 2026, 47% expect a complete and personalised response within three days, while 81% expect one within one week or less. This has remained broadly stable over time, although the share expecting a response within 24 hours has risen to 14%, up from 10% in 2025. Prompt enquiry handling is a service expectation, yes, but also plays an important role in early-stage conversion. Expectations are more flexible once stude nts reach the application stage, but long waits still carry risk. In 2026, 39% expect to receive an application outcome within one week or less, while the largest share, 40%, expect a decision within one month.

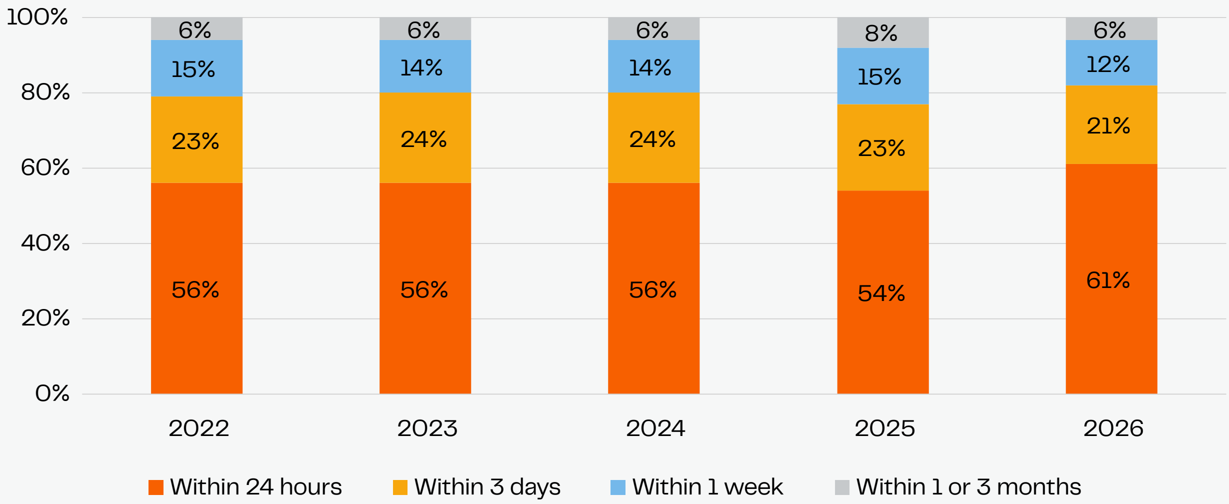
A further 22% are prepared to wait up to three months. This indicates that students understand application decisions may take longer than enquiry responses, but still expect clear progress within a reasonable timeframe.

Over time, application stage expectations have shifted slightly towards longer decision windows. The share willing to wait up to three months has increased from 17% in 2022 to 22% in 2026, while the proportion expecting an outcome within one week remains below 40%. This gives institutions some flexibility, as European outbound students may tolerate longer admissions timelines, but they still need timely updates, clear next steps and reassurance that their application is progressing.

Key questions to consider:

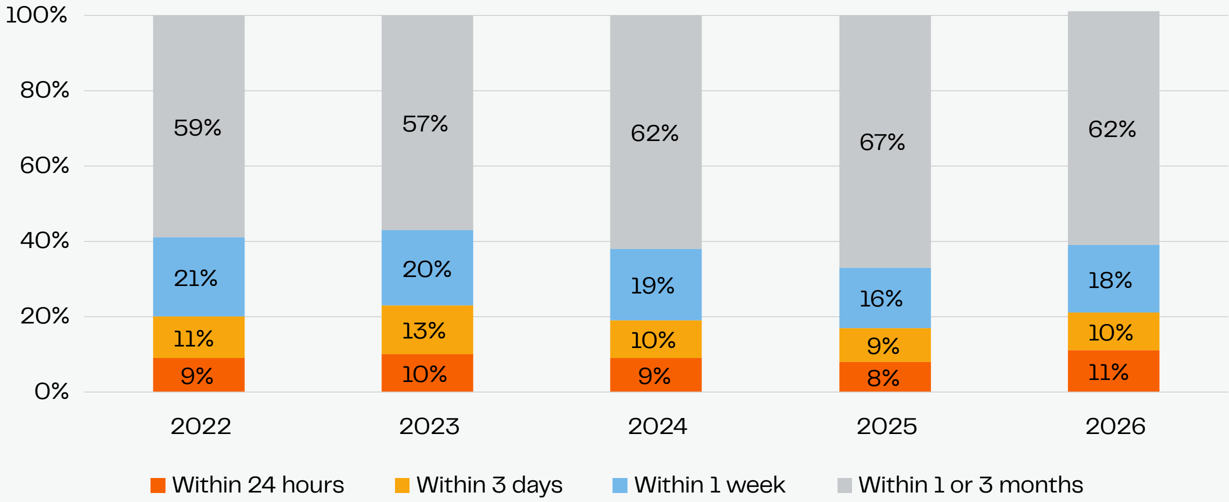
- Are enquiry responses fast and personal enough?
- Are applicants kept informed during longer waits?
- Do response benchmarks reflect European expectations?

Figure 10. European outbound trends: Expectation of time to receive a complete and personal response to an enquiry



Source: QS International Student Survey

Figure 11. European outbound trends: Expectation of time to learn an application outcome



Source: QS International Student Survey

Methodology

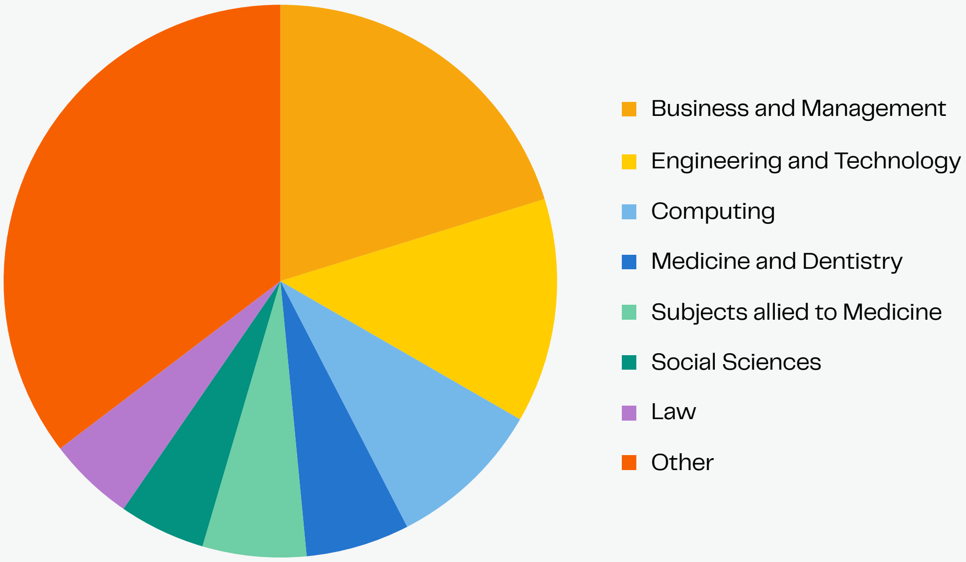
The QS International Student Survey offers an unparalleled view into pre-enrolled international students. The 2026 iteration draws on responses from over 42,115 students in 191 locations, and this report uses over 500,000 responses from the past 5 years.

The questions in the Survey are designed to enable higher education institutions to make sound decisions on recruitment and communication strategies. Now combined with Global Student Flows data, we offer a well-rounded view of where students are choosing to study, and how they make that decision. To understand what matters to students, we ask a wide range of questions about their pre-enrolment journey. We want to know what students prioritise when choosing a location, university and course, and we want to understand what they perceive as high quality teaching. We ask students how their family influence decision making, and we gather data on the social media and digital channels they use to find study information. The International Student Survey also benefits from its longevity – 2026 is our 14th edition. The consistency in our questioning allows us to see how students' answers change over time, and predict future trends and shifts. Its yearly format allows us to add new questions to get a snapshot of student perception.

The International Student Survey's robust methodology ensures we truly represent the perception of pre-enrolled international students. Respondents for the International Student Survey are collected in partnership with global universities. This year, we partnered with 82 universities globally, who were invited to share the Survey with their own prospective international students. Fieldwork for the Survey was conducted between January 5 and April 6 2026, via Qualtrics, an online survey management platform. The Survey contains 50 unique questions, covering a range of topics relating to prospective student decision making, from their study background to their priorities, marketing communication preferences, through to their principal information sources, career aspirations, and post-study plans. The 2026 iteration of the Survey also contains questions on candidate perceptions of different locations as study destinations. Each institution who took part received a tailored benchmarking report detailing the results of their own prospective students.

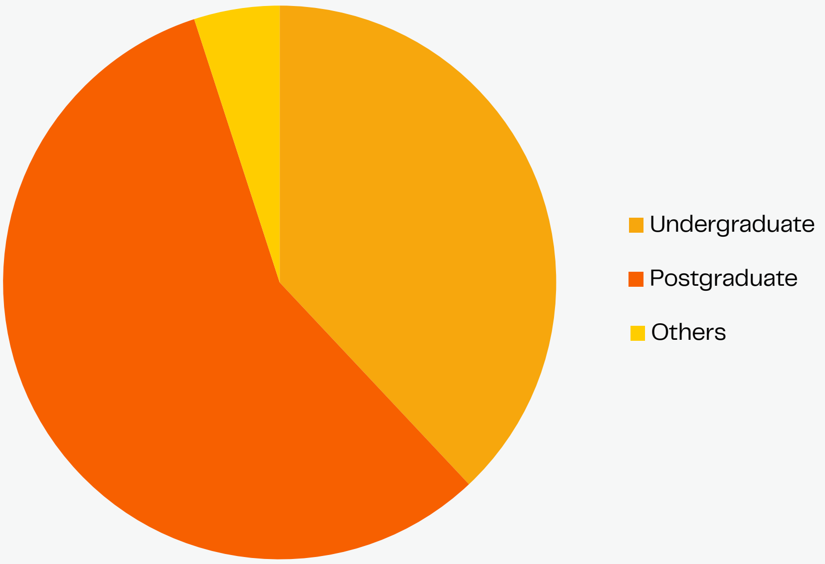
International Student Survey respondent demographics

Subject preference



Source: QS International Student Survey

Study level



Source: QS International Student Survey

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- Support innovation, new models, and market expansion for long-term institutional growth

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