

TRIBAL

i-graduate

Findings from the International Student Barometer 2022/23 DAAD | GATE-Germany

27 FEBRUARY 2024 | NANNETTE RIPMEESTER

DAAD

DAAD

DAAD

CHANGE
BY EXCHANGE

WANDEL DURCH
AUSTAUSCH

WANDEL DURCH
AUSTAUSCH

CHANGE
BY EXCHANGE

Process summary and time scale



Core questionnaire covering decision making, arrival / getting started, learning, living, support, recommendation, employability and wellbeing.



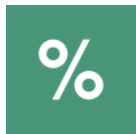
Semi-standardised online questionnaire format, adapted and customised for each partner institution.



Students invited to feedback from September 2022 to December 2022.



120,622 international students and 69,408 domestic students responded from 146 universities in 17 countries.



Institution-specific results compared against comparator groups, national and international benchmarks.



Reporting: in person, confidential and customised to each institution.

Germany ISB Benchmark

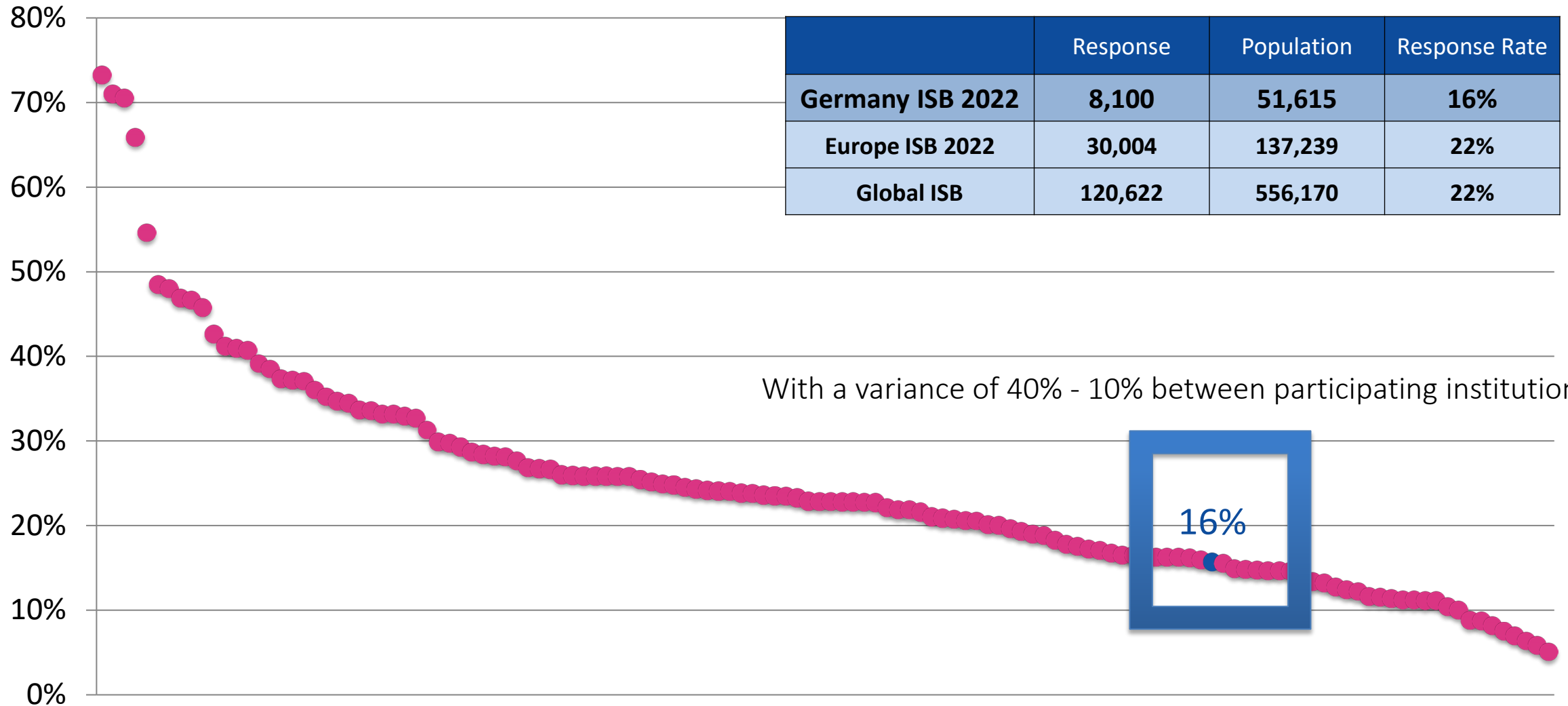
Germany ISB (8,100)	
Brandenburgische Technische Universität Cottbus - Senftenberg	SRH Berlin University of Applied Sciences
Christian-Albrechts-Universität zu Kiel	Technische Hochschule Rosenheim
Freie Universität Berlin	Technische Universität Kaiserslautern
Hochschule Osnabrück	Universität Bayreuth
Hochschule Fulda	Ruhr-Universität Bochum
Hochschule Magdeburg-Stendal	Rheinische-Friedrich-Wilhelms Universität Bonn
Hochschule Neubrandenburg	Georg-August-Universität Göttingen
RWTH Aachen Universität	Friedrich-Schiller-Universität Jena
SRH Hochschule Heidelberg	

Institutions in bold surveyed all students

Survey response

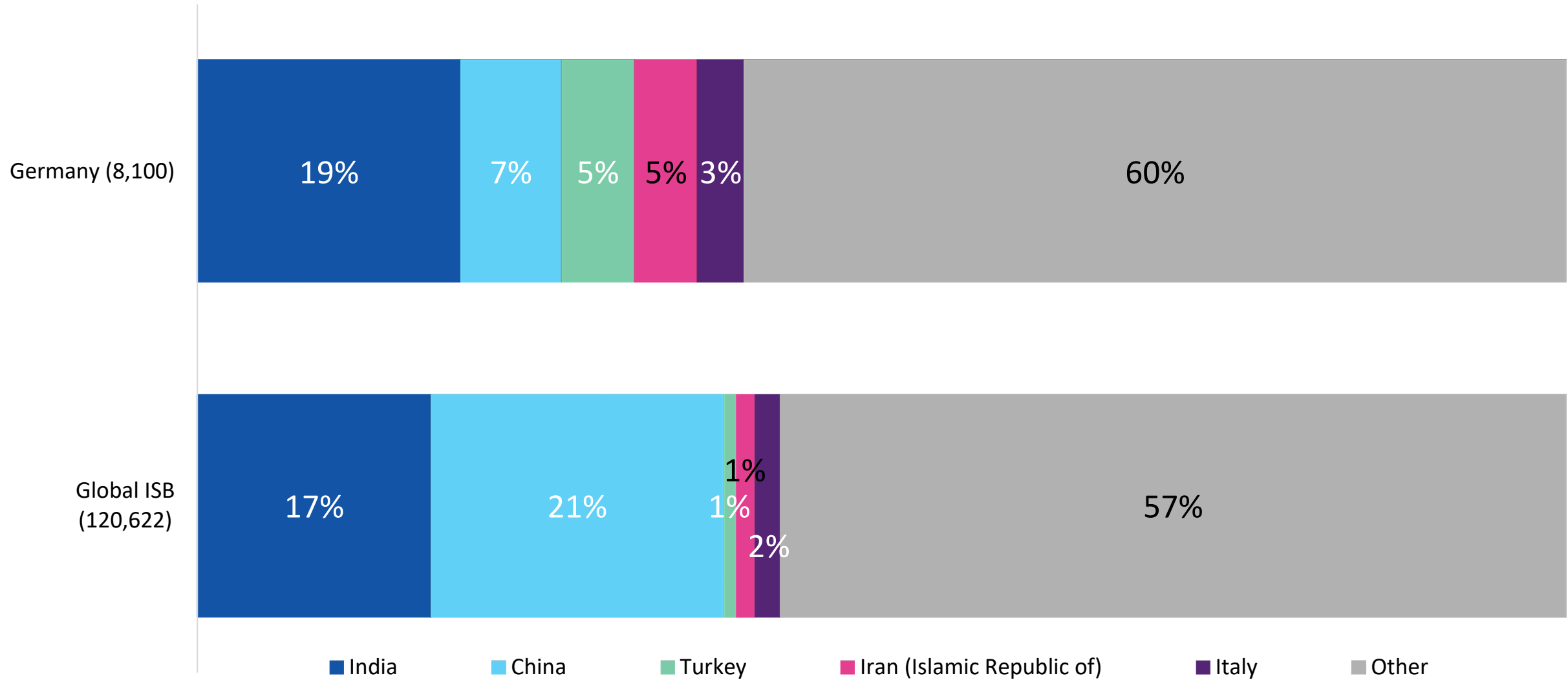


Response rate breakdown



Each dot represents an institution in the global benchmark. The pink dots represent institutions in the primary benchmark. This institution's response rate is highlighted in dark blue

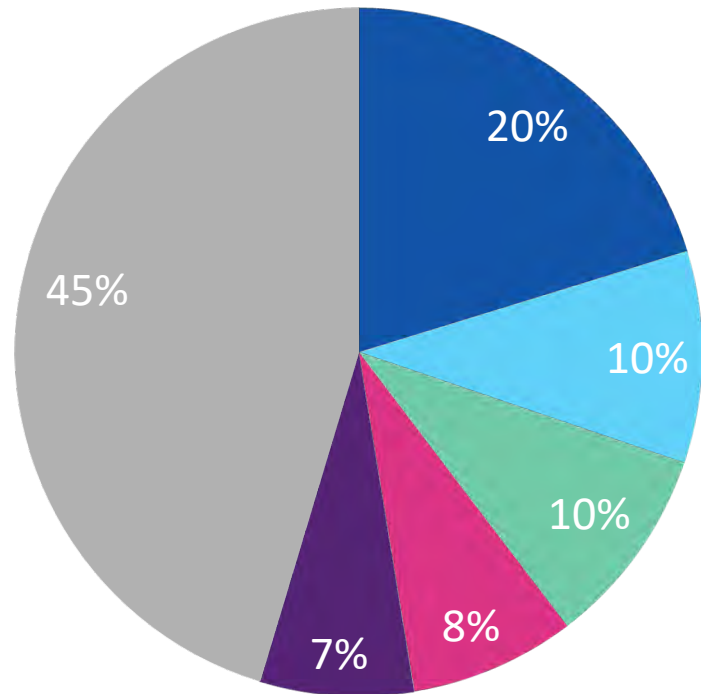
Nationality breakdown



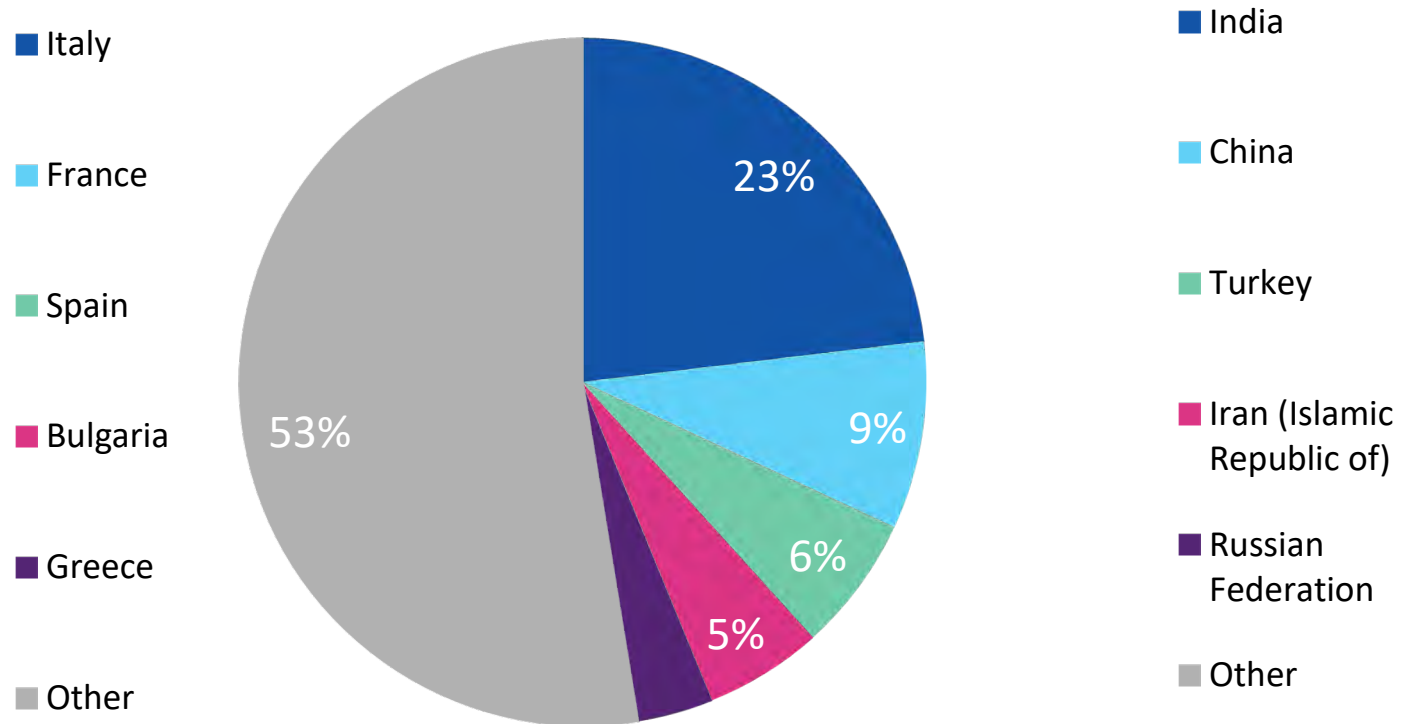
Nationality breakdown

17% EU (1,354) | 83% Non-EU (6,746)

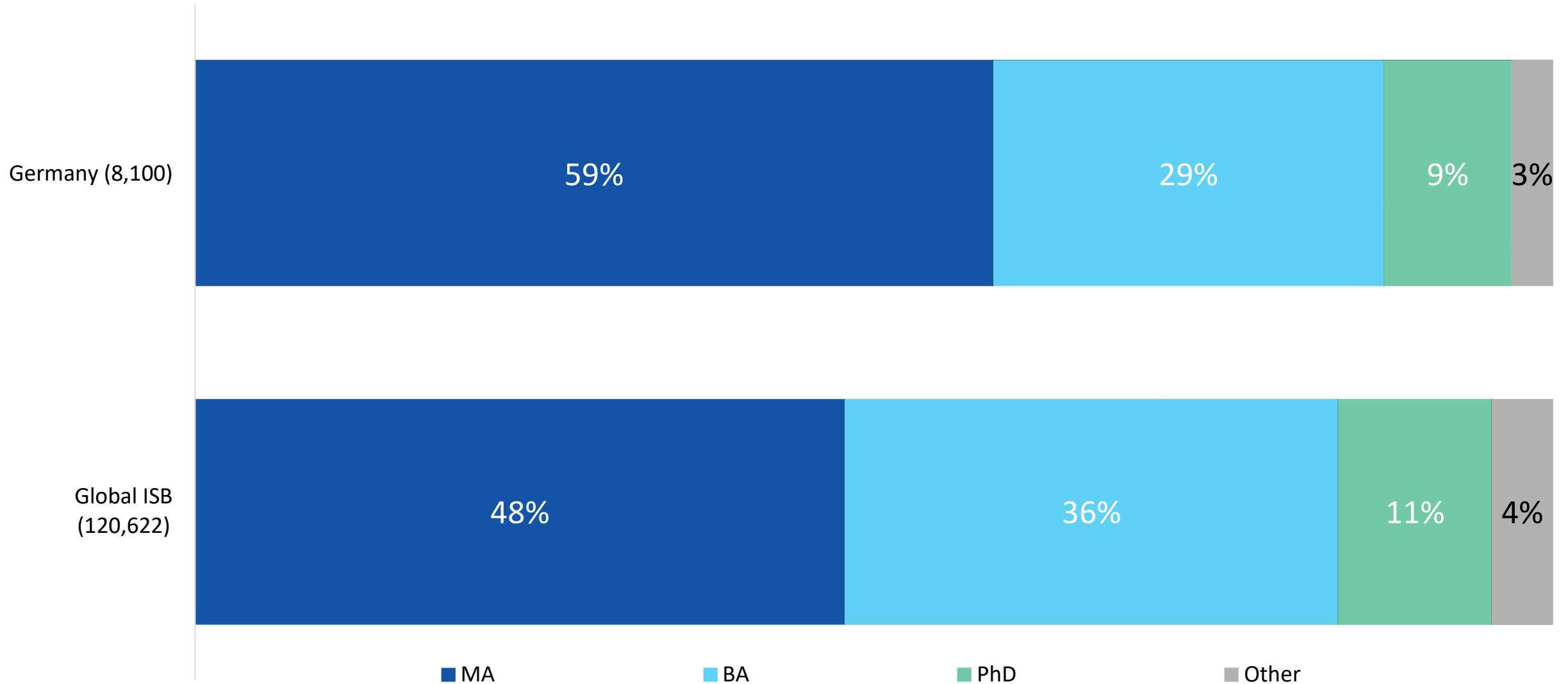
Germany (1,354)



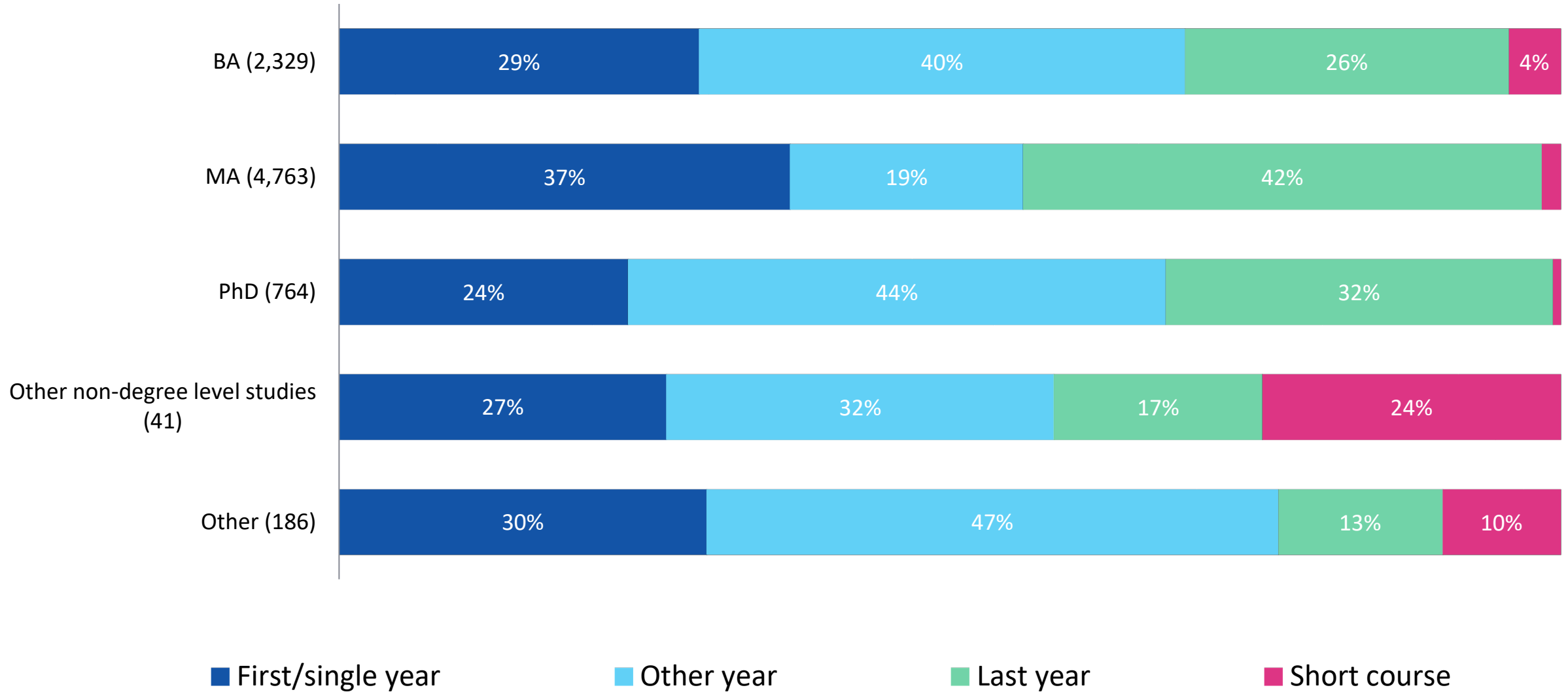
Germany (6,746)



Study level breakdown



Study stage breakdown



Headline Results

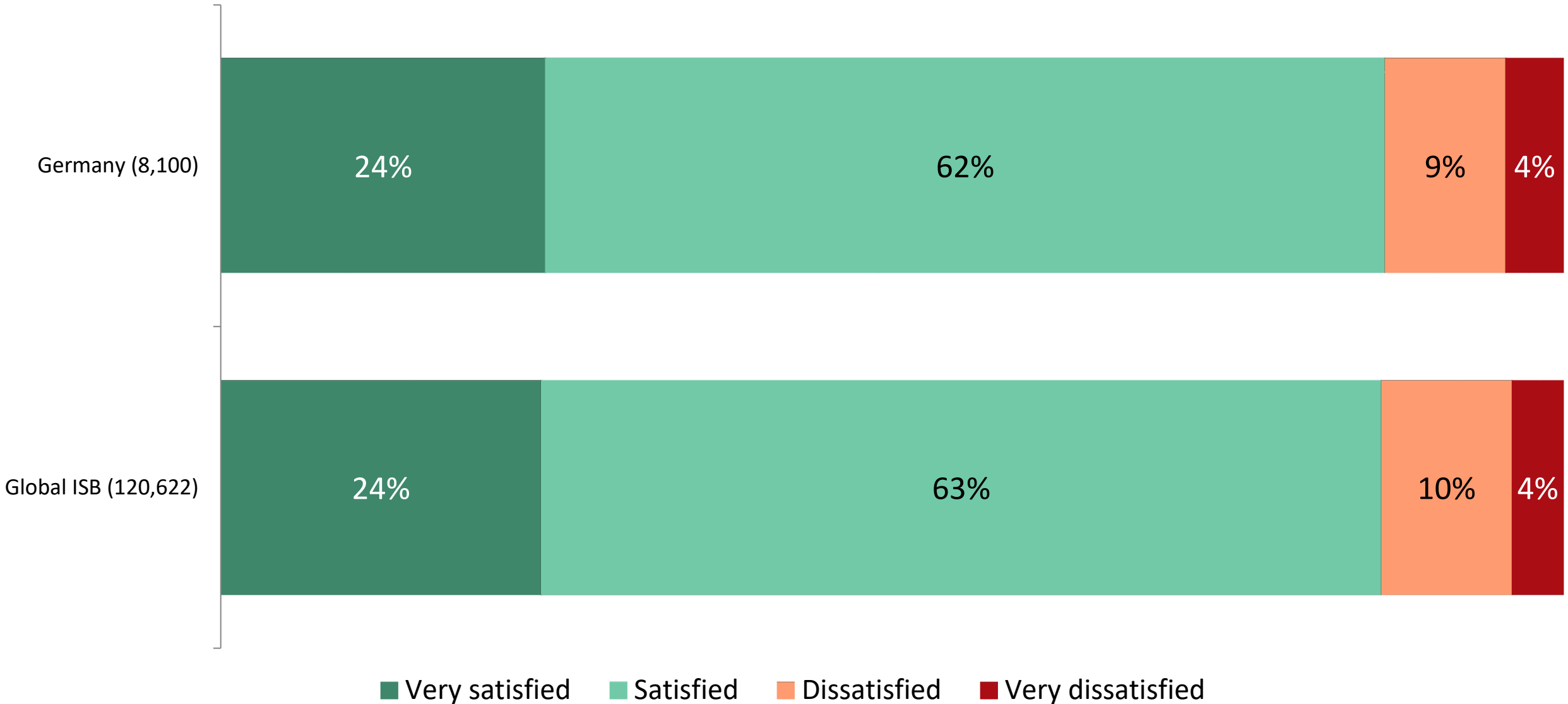


Management summary

- Germany is a **popular study destination**: High quality of education & a clear pathway to careers.
- **Arrival** satisfaction has **improved** considerably in comparison with ISB 2018.
- 97% is **satisfied** with academic standards in **learning experience**.
- In the **living** part there is **room for improvement** re *'making friends from this country'* & *'good contacts for the future'*.
- With regard to **support services**, the accommodation office (*Studierendenwerk*) **can be improved** as well as career services.
- **Employability is key**: strengthen career support & make connection between curricula and employability (*world of work*).



Overall satisfaction



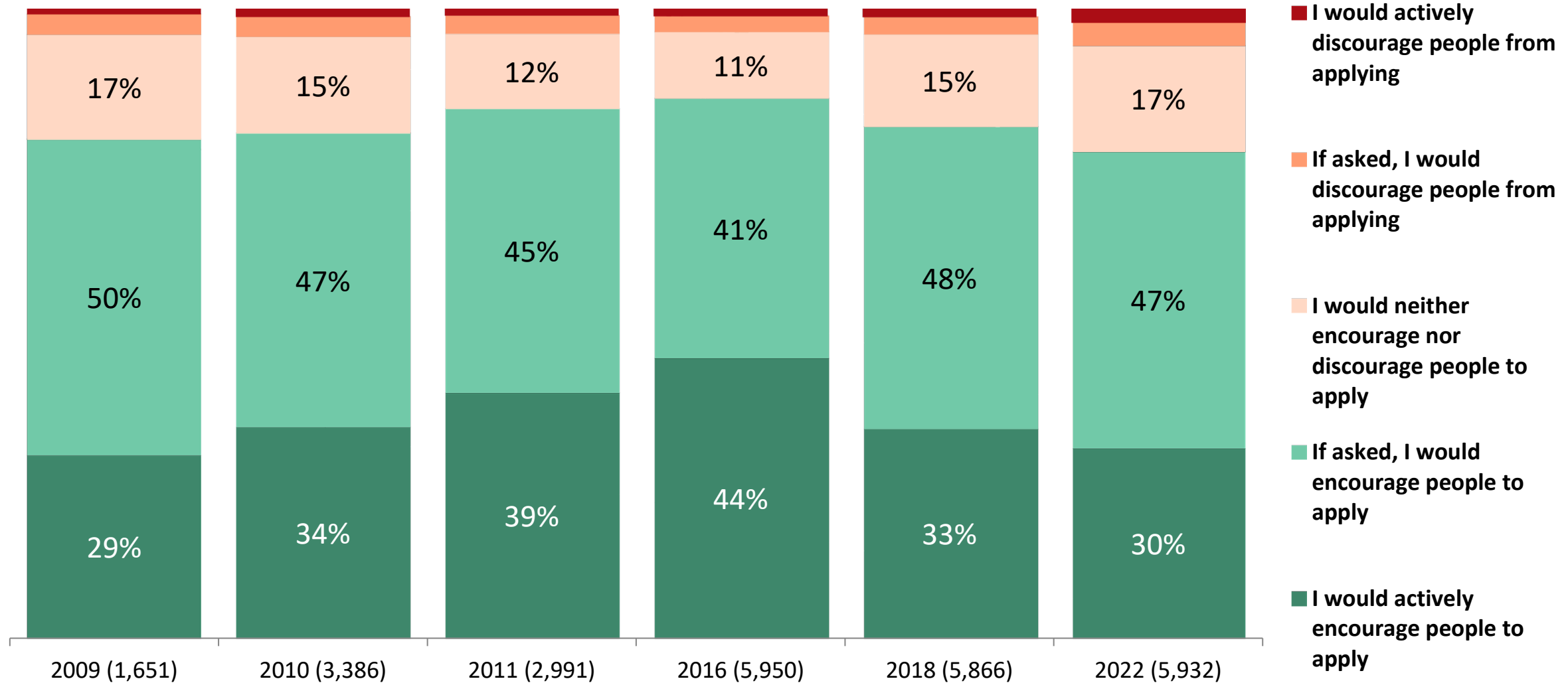
Overall, how satisfied are you with all aspects of your experience at this institution?

Propensity to recommend

Germany (5,932)	2022 vs 2018		Global ISB (93,294)	Europe ISB (22,871)	MA (3,561)	BA (1,627)	PhD (581)
30%	-3%	I would actively encourage people to apply	31%	30%	32%	26%	32%
47%	-1%	If asked, I would encourage people to apply	45%	49%	46%	49%	49%
17%	2%	I would neither encourage nor discourage people to apply	18%	16%	17%	18%	14%
4%	1%	If asked, I would discourage people from applying	4%	4%	3%	4%	2%
2%	1%	I would actively discourage people from applying	2%	2%	2%	2%	2%

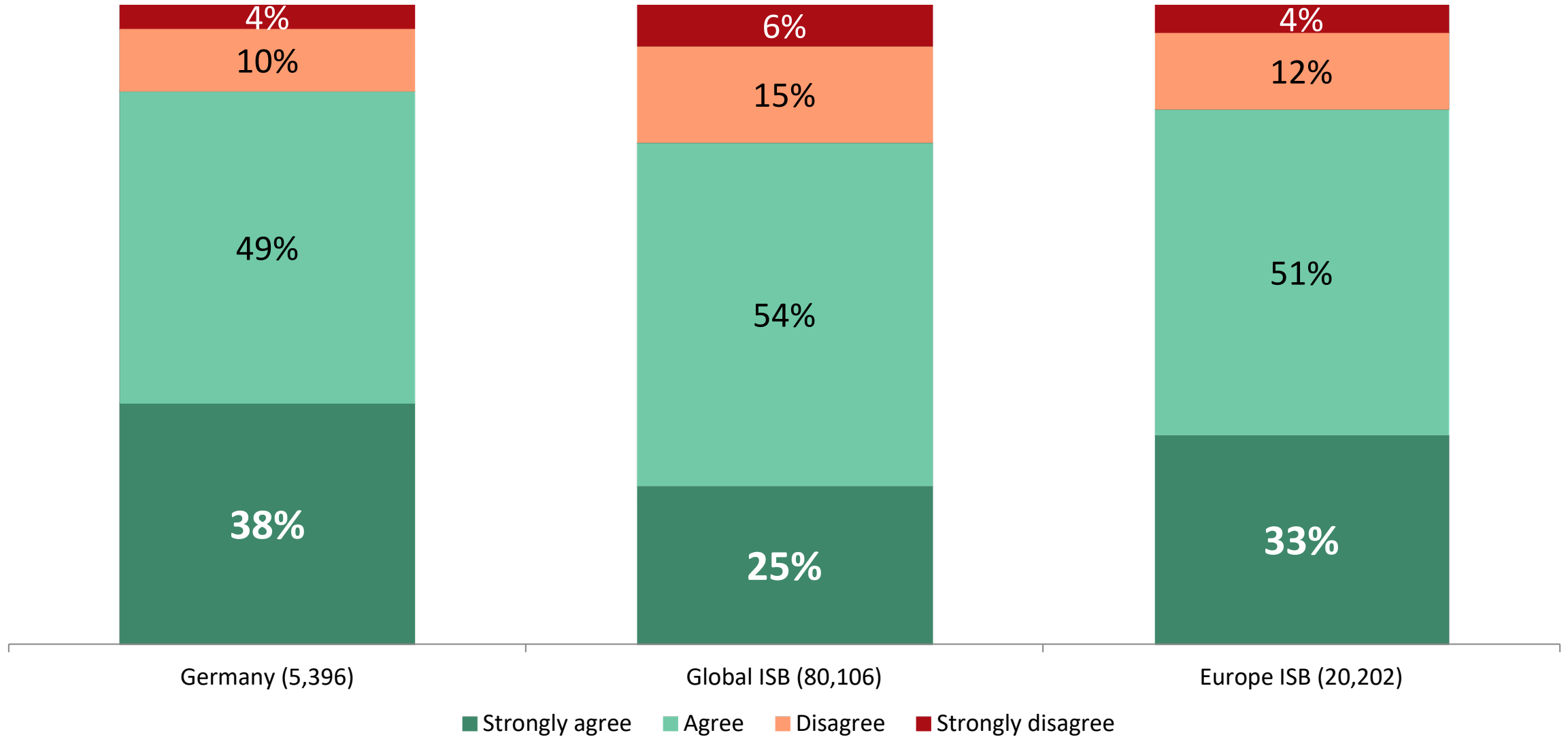
How likely is it that you would recommend this institution to family or a friend?

Propensity to recommend (year-on-year)



Would you recommend this institution to others thinking of applying here?

Value for money



To what extent do you feel that your current course is good value for money?

Choice of destination

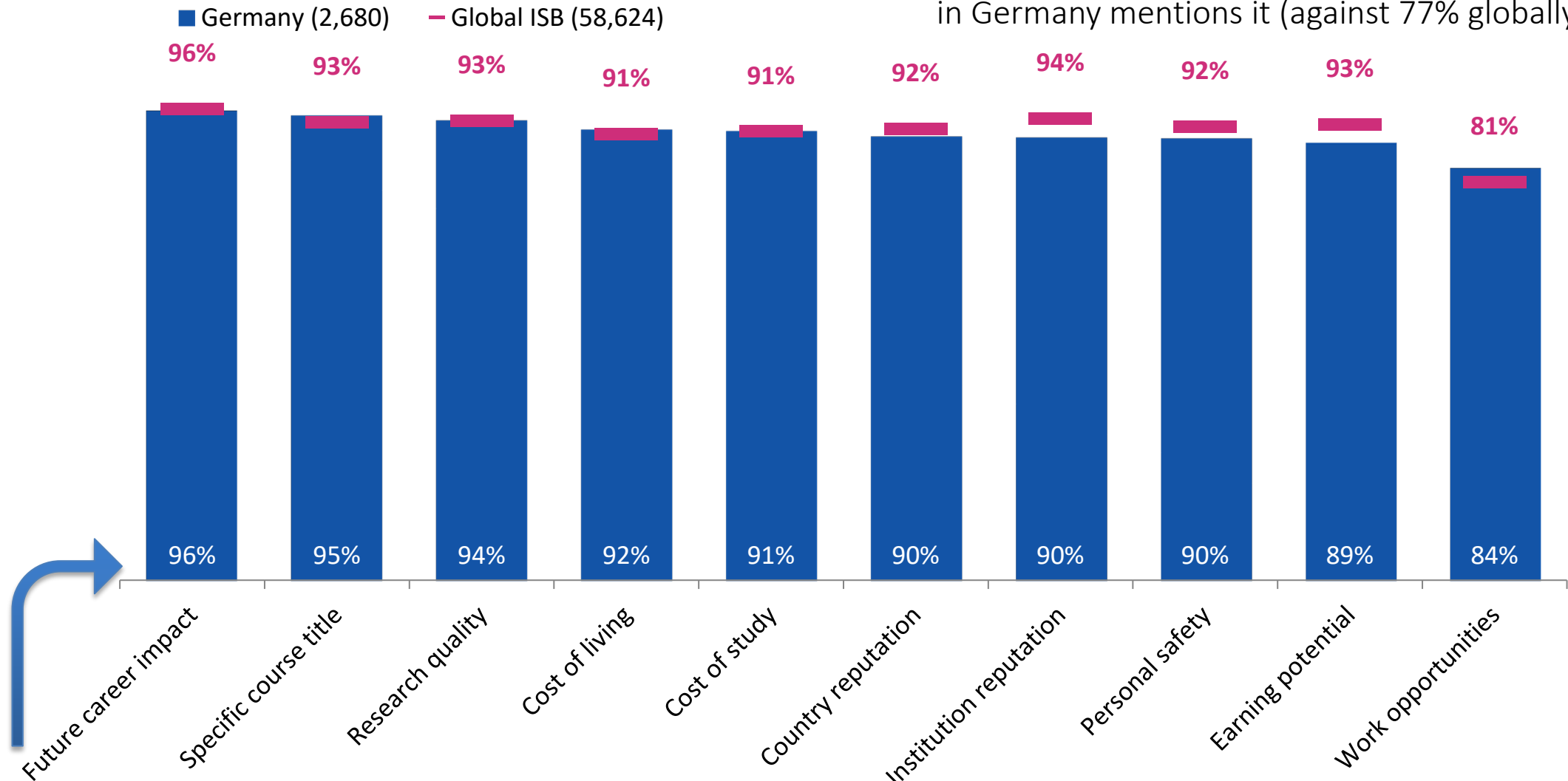
(First year students only)



Top 10 factors in study decision

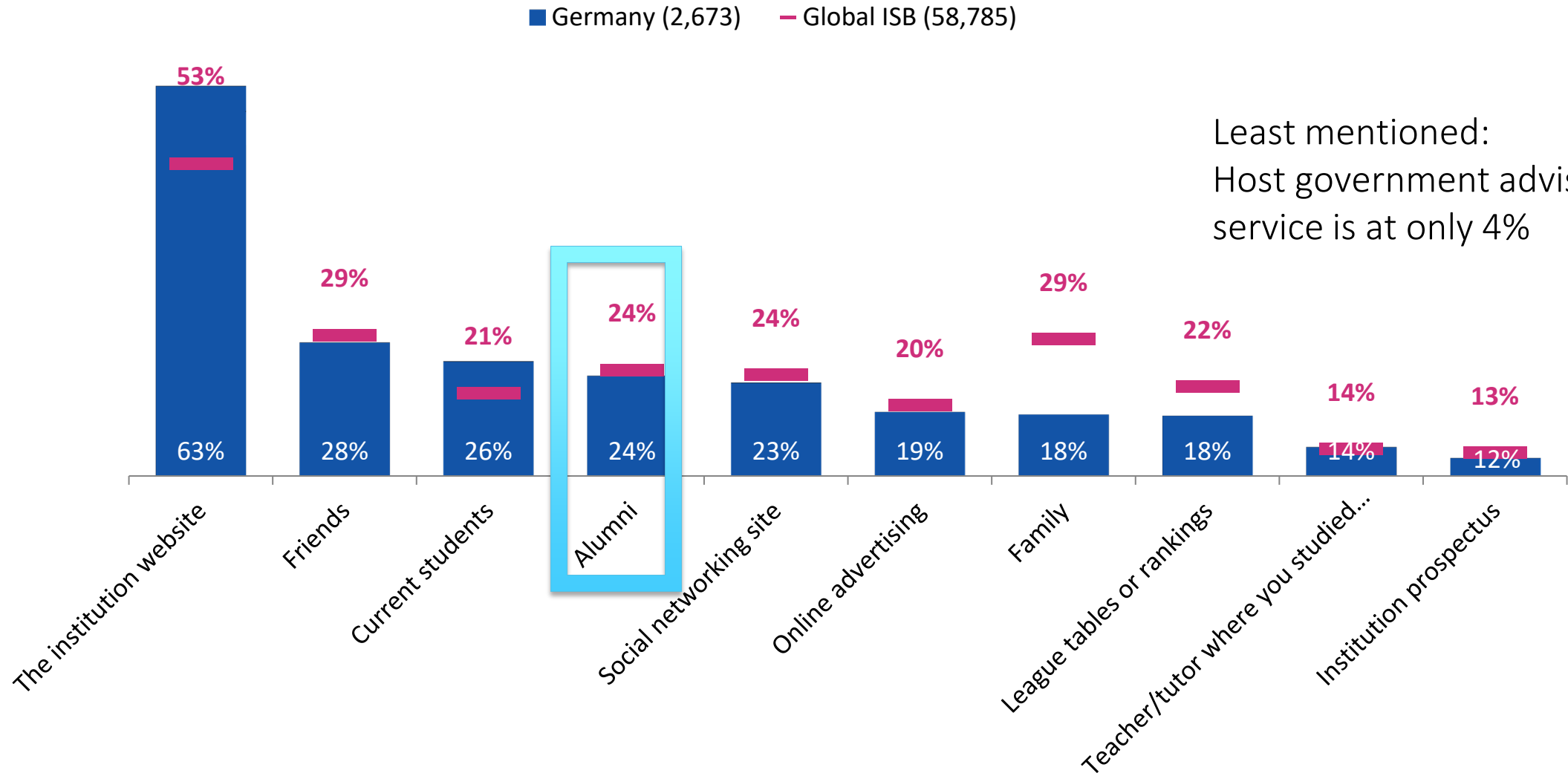
(% Important or Very important)

Environmental issues are getting more common as 'decision-making' factor: 68% of international students in Germany mentions it (against 77% globally).



How important were the following factors when deciding where to study?

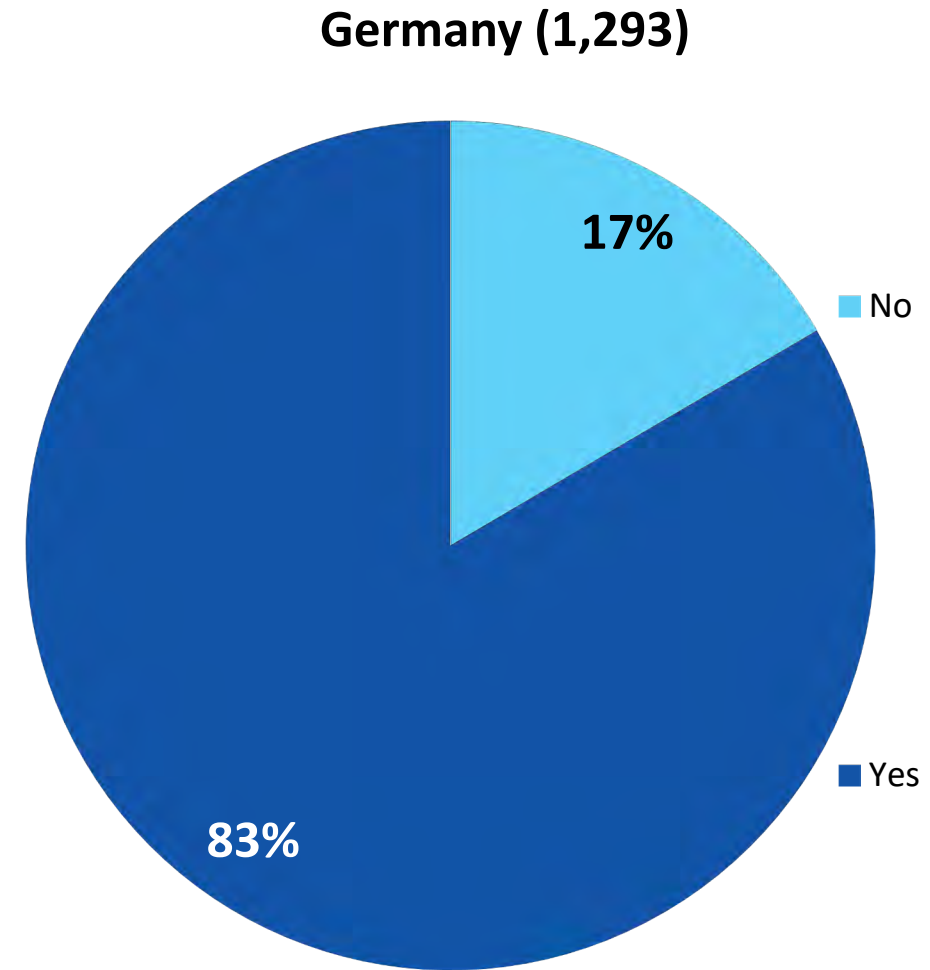
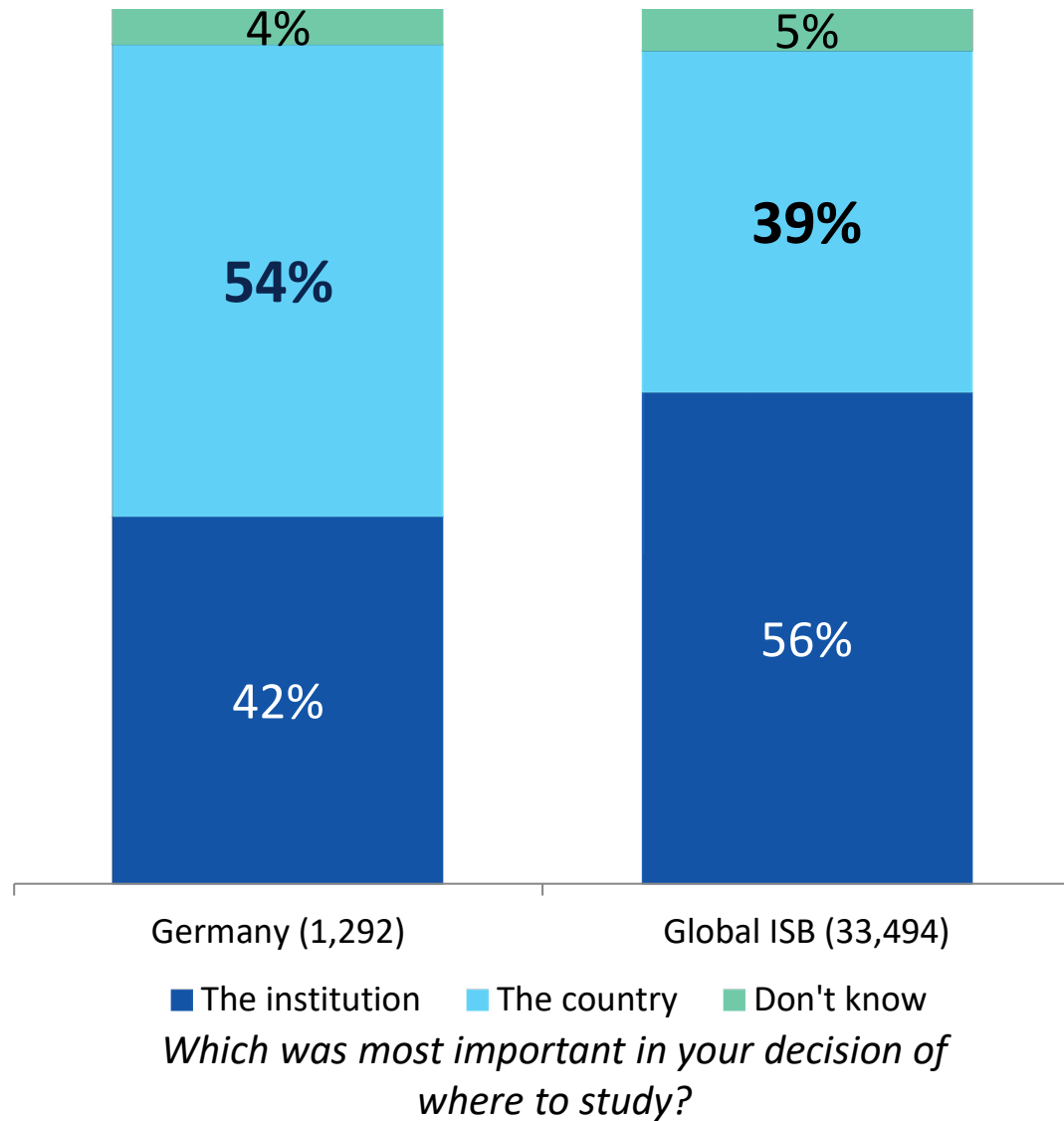
Top 10 influencers (choice of institution)



Least mentioned:
Host government advisory
service is at only 4%

Which of the following helped you to choose this institution?

But ... Germany's Brand strength is strong



Was this country your first choice for international education?

HOW DO INTERNATIONAL STUDENTS *DECIDE* FOR A GERMAN HIGHER EDUCATION INSTITUTION?

TOP 3 FOR STUDY CHOICE IS:

Future career impact	96%
Specific course title	95%
Research quality	94%



TOP

✓ **Future Career Impact** is principal driver for study experience in Germany.



TIP

Integrate employability skills into curricula to support international students in navigating the constantly changing world of work.

FIRST CHOICE FOR STUDY LOCATION

GERMAN ISB 2022	83%
GERMAN ISB 2018	82% +1%
GLOBAL ISB 2022	+4% 79%

THE COUNTRY IS MORE IMPORTANT THAN THE INSTITUTION:

GERMAN ISB 2022

54% cited the country as the primary factor

42% leaned towards the institution

GLOBAL ISB BENCHMARK 2022

39% cited the country as the primary attraction factor

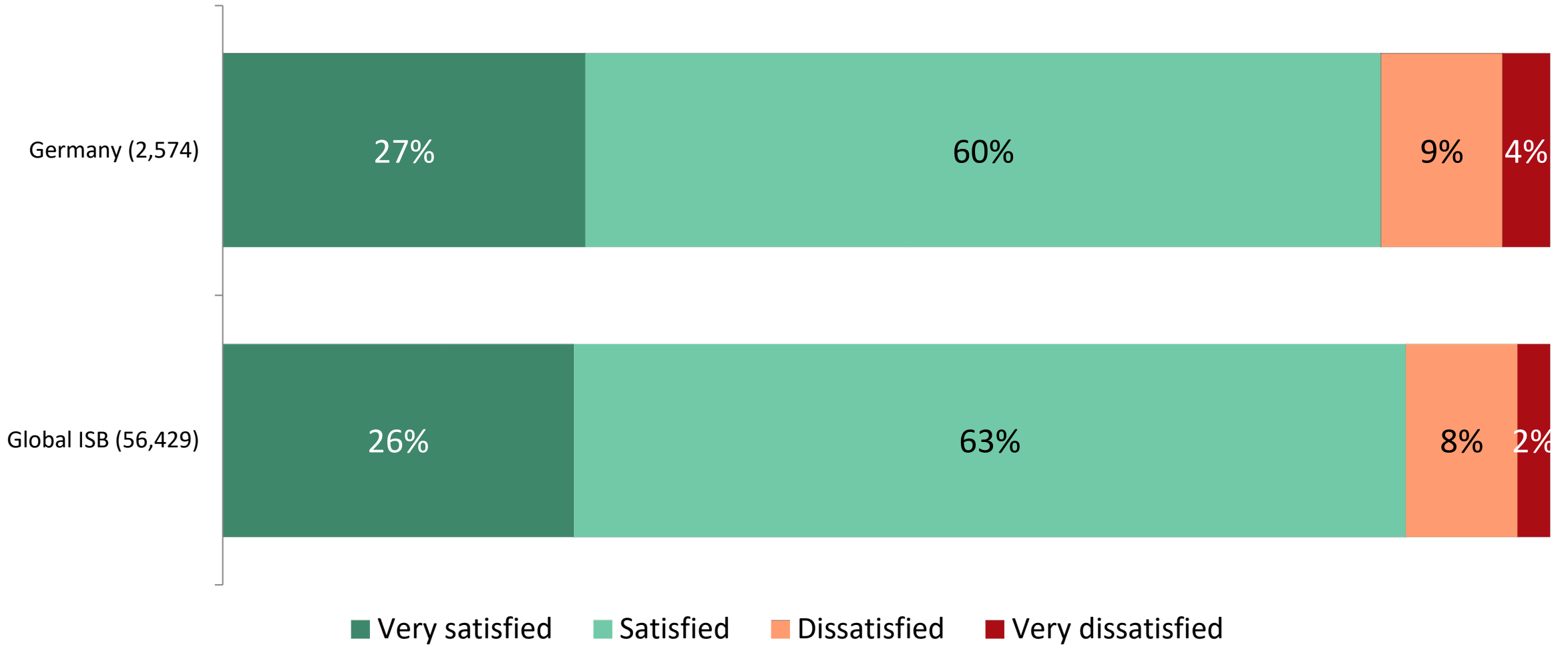
AGAIN highlighting that German higher education as a *whole* is a strong brand.

Arrival / Getting started

(First year students only)

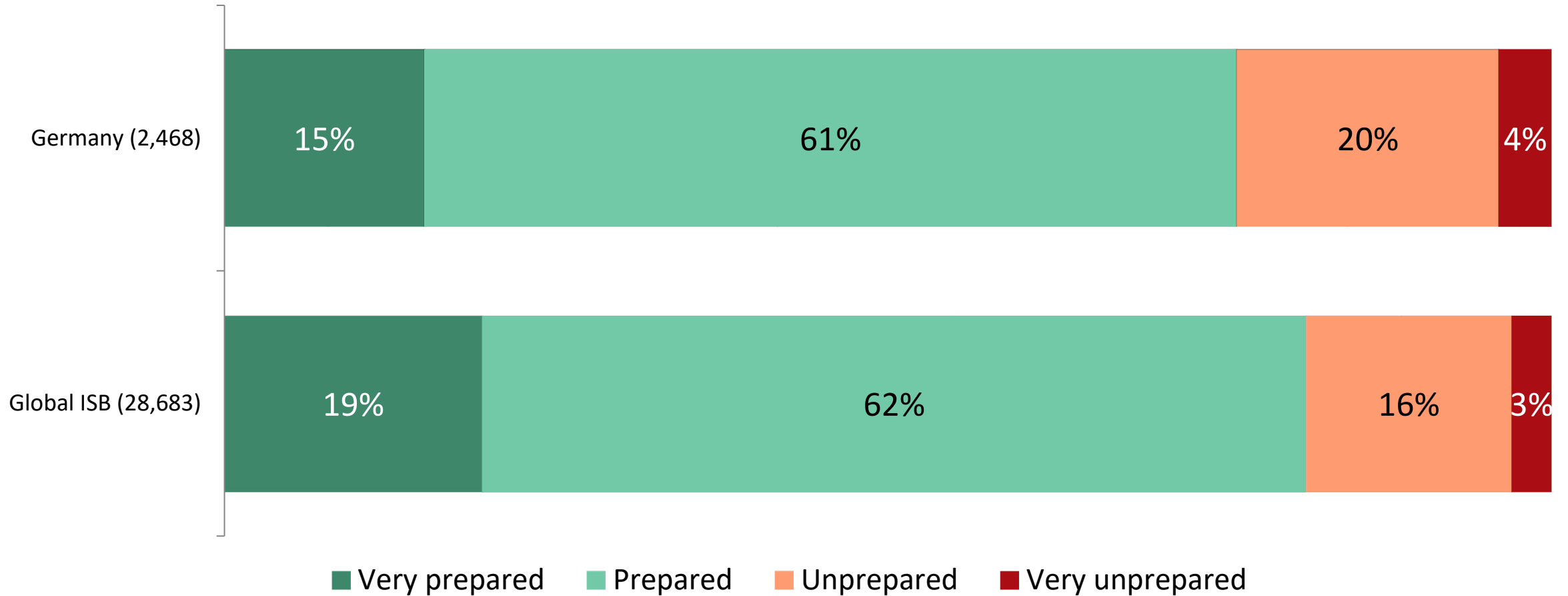


Overall satisfaction – Arrival / Getting Started



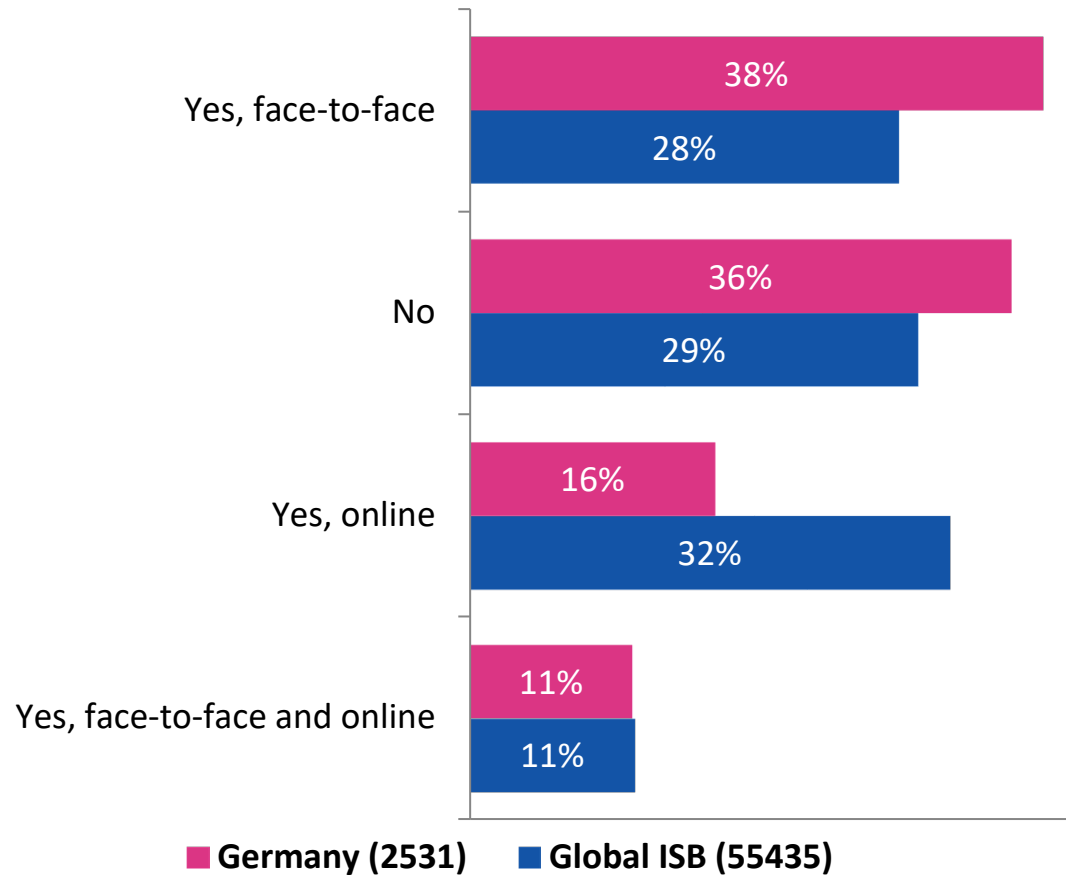
Overall, how satisfied were you with the arrival experience?

Academically prepared

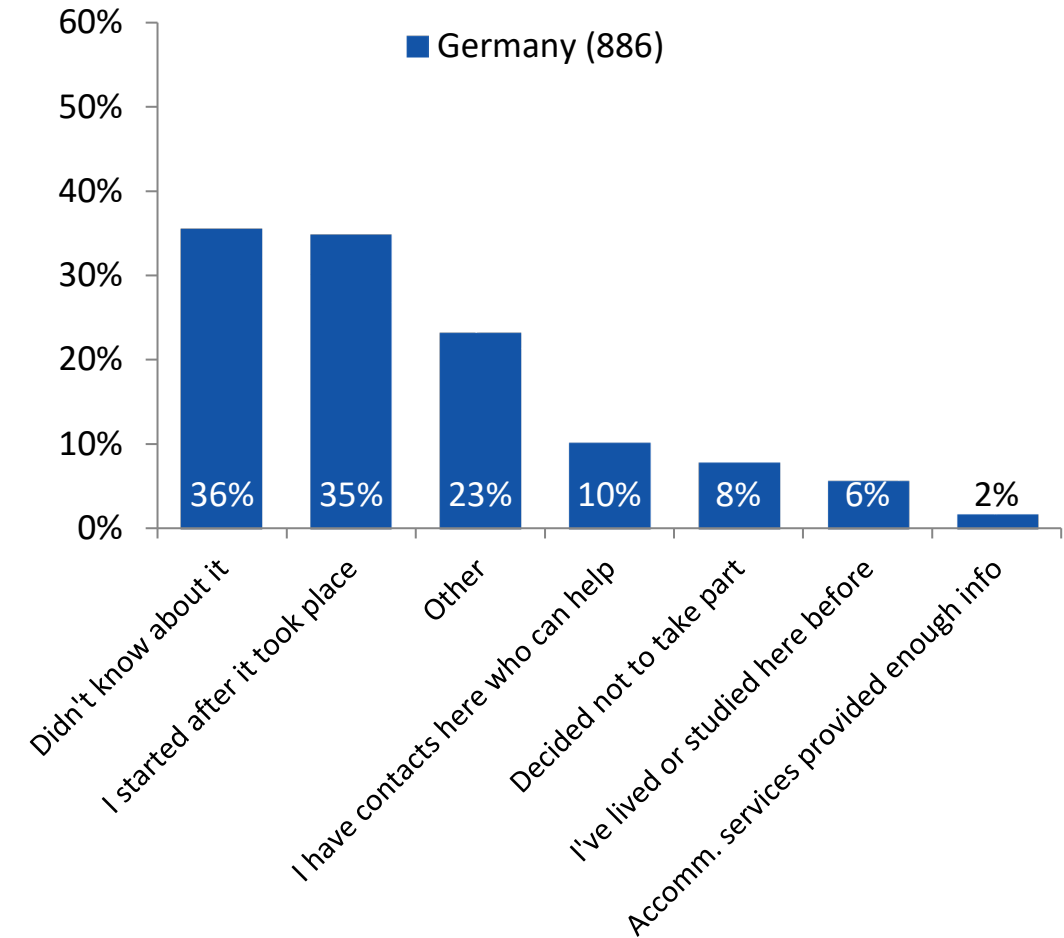


Before arriving at your institution, how prepared did you feel ACADEMICALLY to start your studies?

Orientation programme



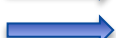
Did you attend / participate in a formal ORIENTATION / ONBOARDING programme?



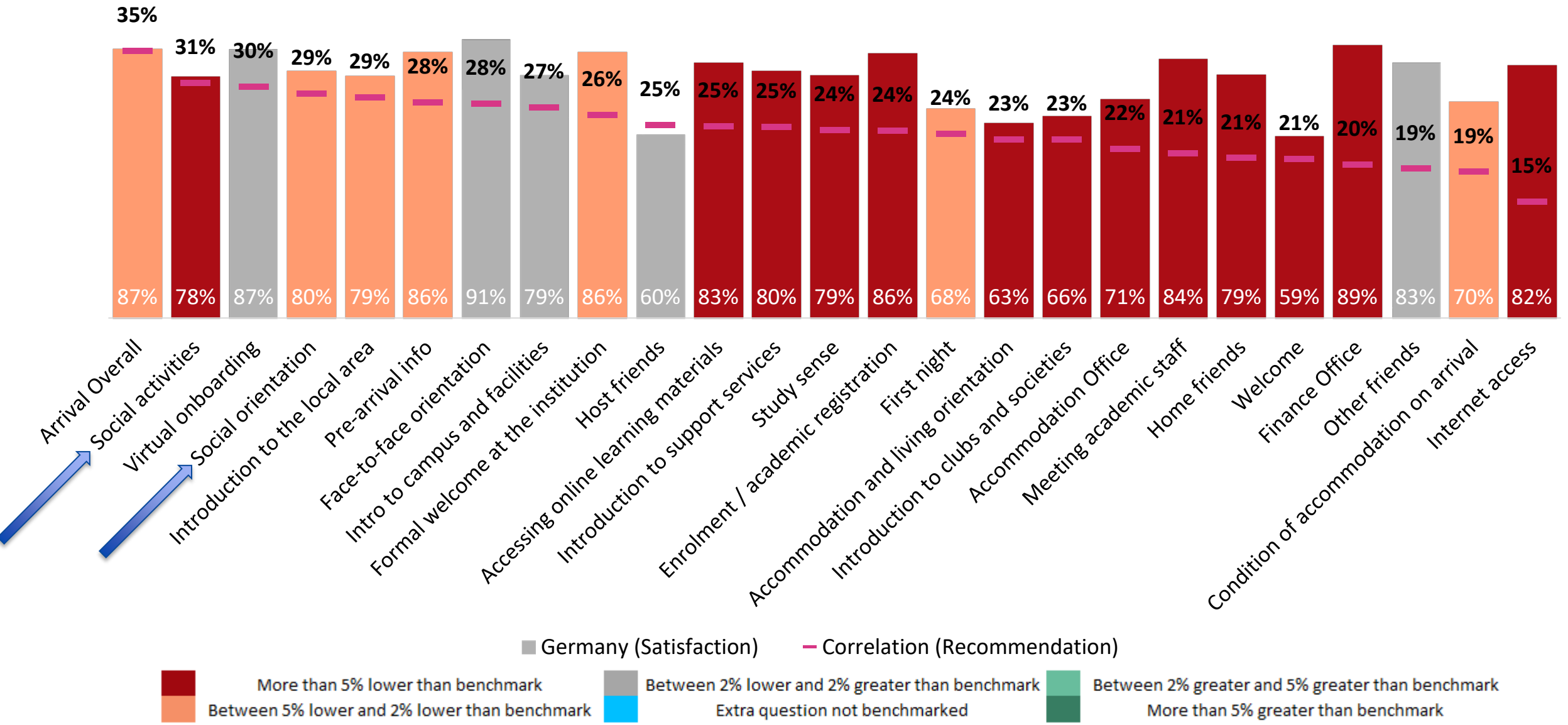
If not, why not?

Benchmarking arrival

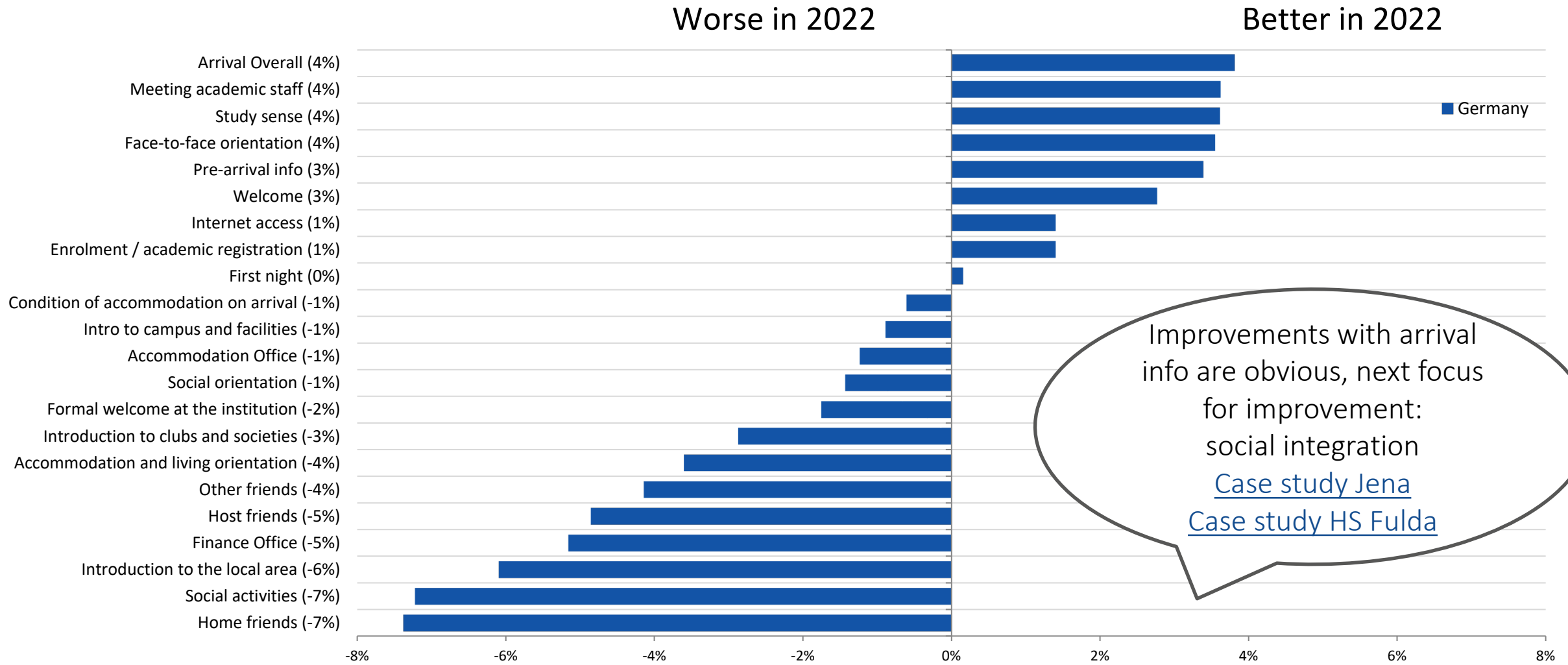
Germany		Global ISB			Europe ISB		
ARRIVAL AVERAGE	78%	84%	-6.4%		79%	-0.8%	
ARRIVAL OVERALL	87%	89%	-1.9%		87%	0.0%	
ARRIVAL							
Pre-arrival info	86%	90%	-3.8%		86%	0.2%	
Condition of accommodation on arrival	70%	81%	-11.0%		74%	-3.6%	
First night	68%	82%	-13.7%		77%	-8.6%	
Welcome	59%	75%	-15.8%		65%	-6.1%	
ORIENTATION							
Face-to-face orientation	91%	91%	-0.8%		86%	4.3%	
Finance Office	89%	90%	-1.3%		85%	4.0%	
Virtual onboarding	87%	87%	0.3%		82%	5.4%	
Formal welcome at the institution	86%	87%	-1.1%		85%	1.1%	
Enrolment / academic registration	86%	90%	-3.6%		87%	-1.1%	
Meeting academic staff	84%	89%	-4.9%		85%	-0.5%	
Other friends	83%	85%	-2.4%		87%	-4.3%	
Accessing online learning materials	83%	89%	-5.8%		84%	-0.7%	
Internet access	82%	86%	-3.8%		84%	-2.0%	
Social orientation	80%	83%	-2.9%		78%	2.7%	
Introduction to support services	80%	86%	-5.9%		78%	2.2%	
Intro to campus and facilities	79%	81%	-2.3%		74%	5.3%	
Home friends	79%	86%	-6.7%		80%	-1.1%	
Study sense	79%	86%	-7.8%		81%	-2.1%	
Introduction to the local area	79%	81%	-2.3%		75%	3.2%	
Social activities	78%	84%	-5.9%		80%	-1.5%	
Accommodation Office	71%	84%	-12.6%		74%	-3.4%	
Introduction to clubs and societies	66%	78%	-12.3%		71%	-5.9%	
Accommodation and living orientation	63%	77%	-14.1%		65%	-1.3%	
Host friends	60%	73%	-13.3%		64%	-4.3%	



Derived importance - Arrival



Arrival satisfaction (year-on-year)



Improvements with arrival info are obvious, next focus for improvement: social integration
[Case study Jena](#)
[Case study HS Fulda](#)

*2022 vs 2018

Chart shows change of institution result vs last institution result (not benchmark)

WHAT ARE THE LESSONS FROM THE ISB REGARDING THE ARRIVAL EXPERIENCE FOR GERMAN HIGHERED INSTITUTIONS?



TOP

✓ German Higher Education institutions have improved considerably in the **welcome area**.

BUT: Room for improvement around the "welcome and/or pick-up at the airport, train or bus station"

16%

lower than the Global ISB

6%

lower than the European ISB benchmark

DISCUSSION POINT:

How much should you 'spoon-feed' international students?

The factors that contribute most to the institution's recommendation with respect to arrival:

- 1 Overall arrival experience
- 2 Social activities upon arrival
- 3 Virtual onboarding
- 4 The social orientation
- 5 The introduction to the local area



TIP

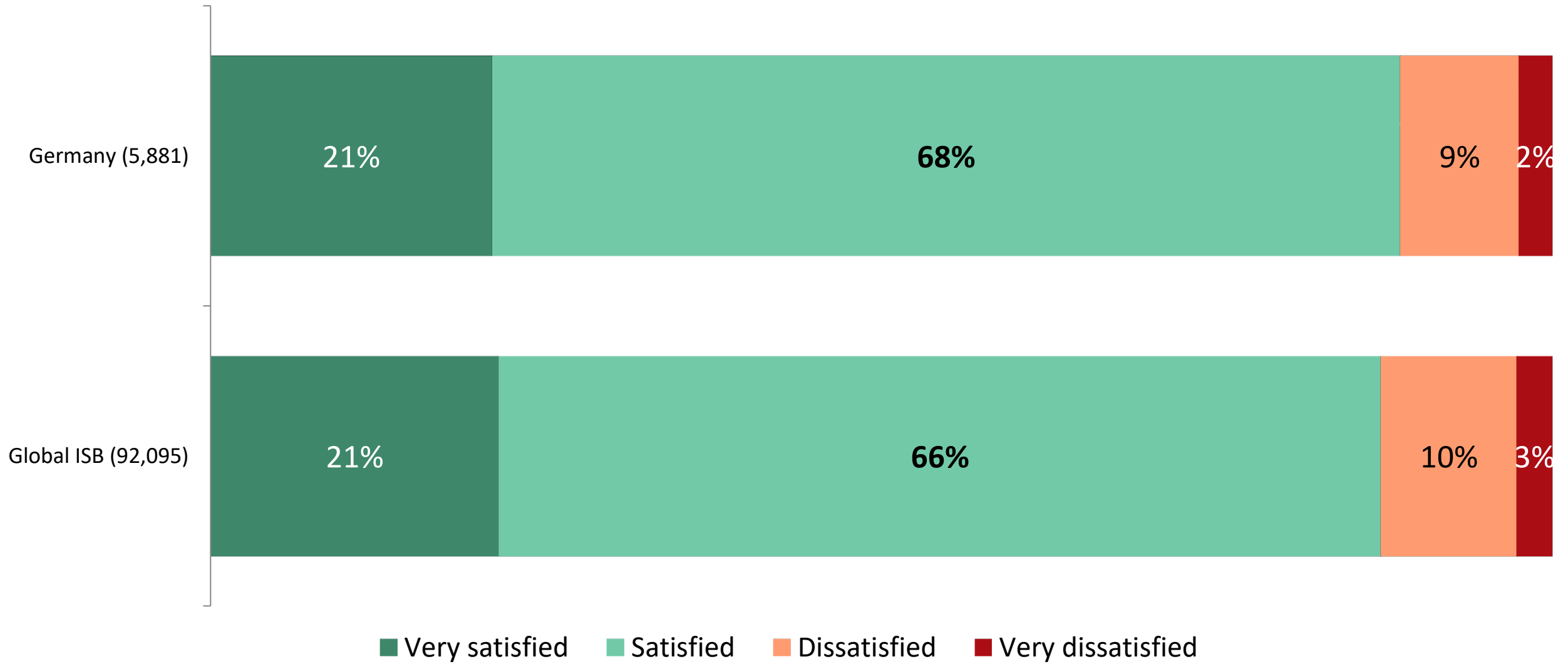
ATTENTION: international students find it **difficult to make friends with German students**.

TO IMPROVE: focus on the German students as they are the key to the solution. International students are already out of their 'comfort zone'.

Learning experience



Overall satisfaction - Learning



Overall, how satisfied are you with the learning experience at this stage in the year?





















Benchmarking learning - Teaching

Germany		Global ISB		Europe ISB	
LEARNING AVERAGE	84%	88%	-4.1%	85%	-1.5%
LEARNING OVERALL	89%	87%	1.4%	88%	0.9%
TEACHING					
Expert lecturers	94%	94%	0.2%	95%	-0.6%
Submitting work remotely	92%	94%	-2.4%	95%	-2.8%
The quality of lectures	90%	90%	-0.3%	89%	0.9%
Communicating with tutors	89%	91%	-2.3%	90%	-1.7%
Course content	88%	90%	-2.3%	89%	-0.7%
The level of research activity	88%	90%	-2.1%	88%	-0.4%
Good teachers	87%	89%	-2.0%	87%	0.2%
Assessment	87%	90%	-2.7%	86%	0.8%
Learning support	82%	88%	-6.4%	84%	-2.4%
Performance feedback	81%	86%	-4.2%	79%	2.7%
Course organisation	81%	85%	-4.2%	81%	0.1%
Marking criteria	79%	85%	-5.9%	79%	0.9%

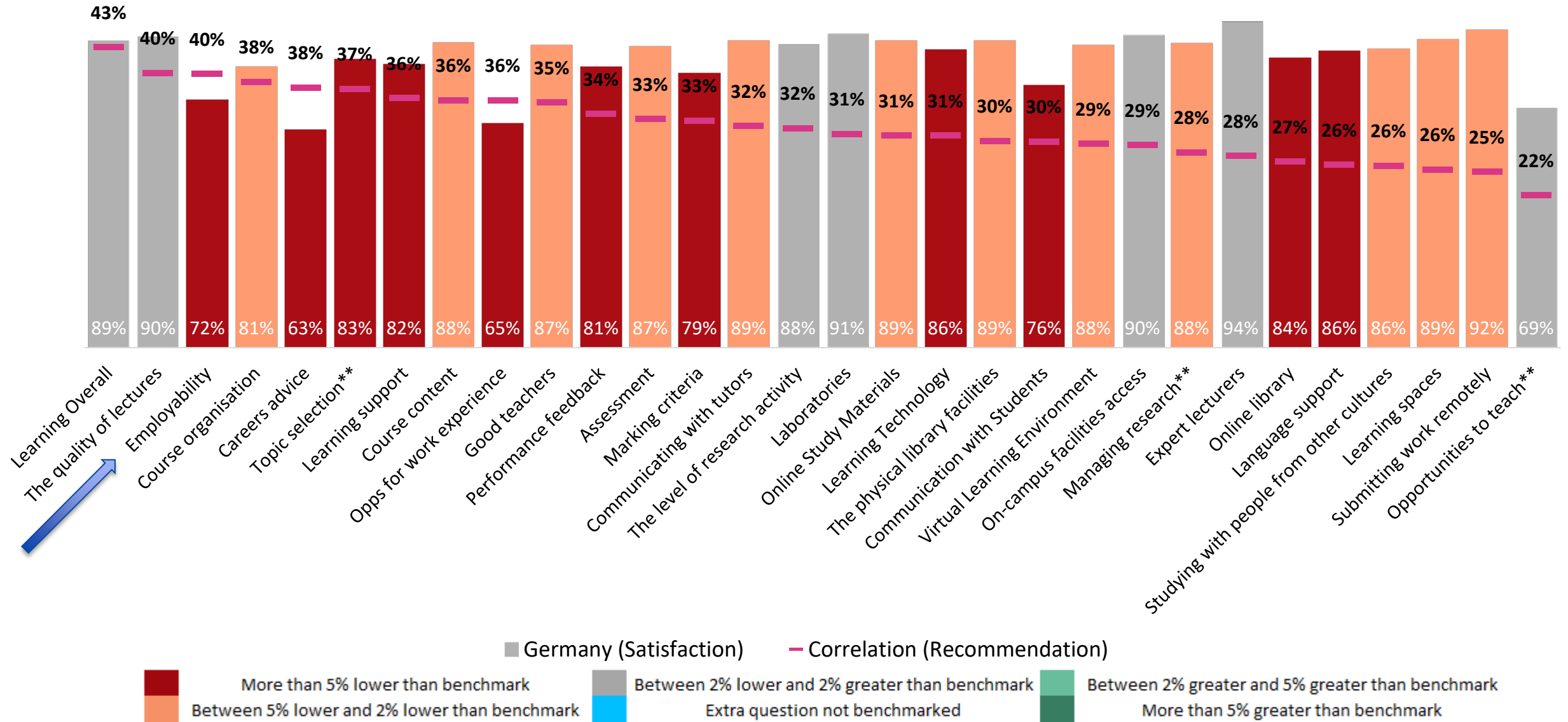
Benchmarking learning - Studies

Germany		Global ISB			Europe ISB	
LEARNING AVERAGE	84%	88%	-4.1%		85%	-1.5%
LEARNING OVERALL	89%	87%	1.4%		88%	0.9%
STUDIES						
Managing research**	88%	91%	-2.7%		88%	0.0%
Studying with people from other cultures	86%	90%	-3.4%		91%	-4.2%
Language support	86%	91%	-5.2%		91%	-5.2%
Topic selection**	83%	90%	-6.2%		84%	-0.9%
Communication with Students	76%	84%	-7.6%		80%	-4.4%
Employability →	72%	81%	-9.4%		74%	-2.0%
Opportunities to teach**	69%	79%	-9.8%		76%	-6.2%
Opps for work experience	65%	74%	-8.7%		64%	1.4%
Careers advice →	63%	76%	-12.9%		64%	-0.6%

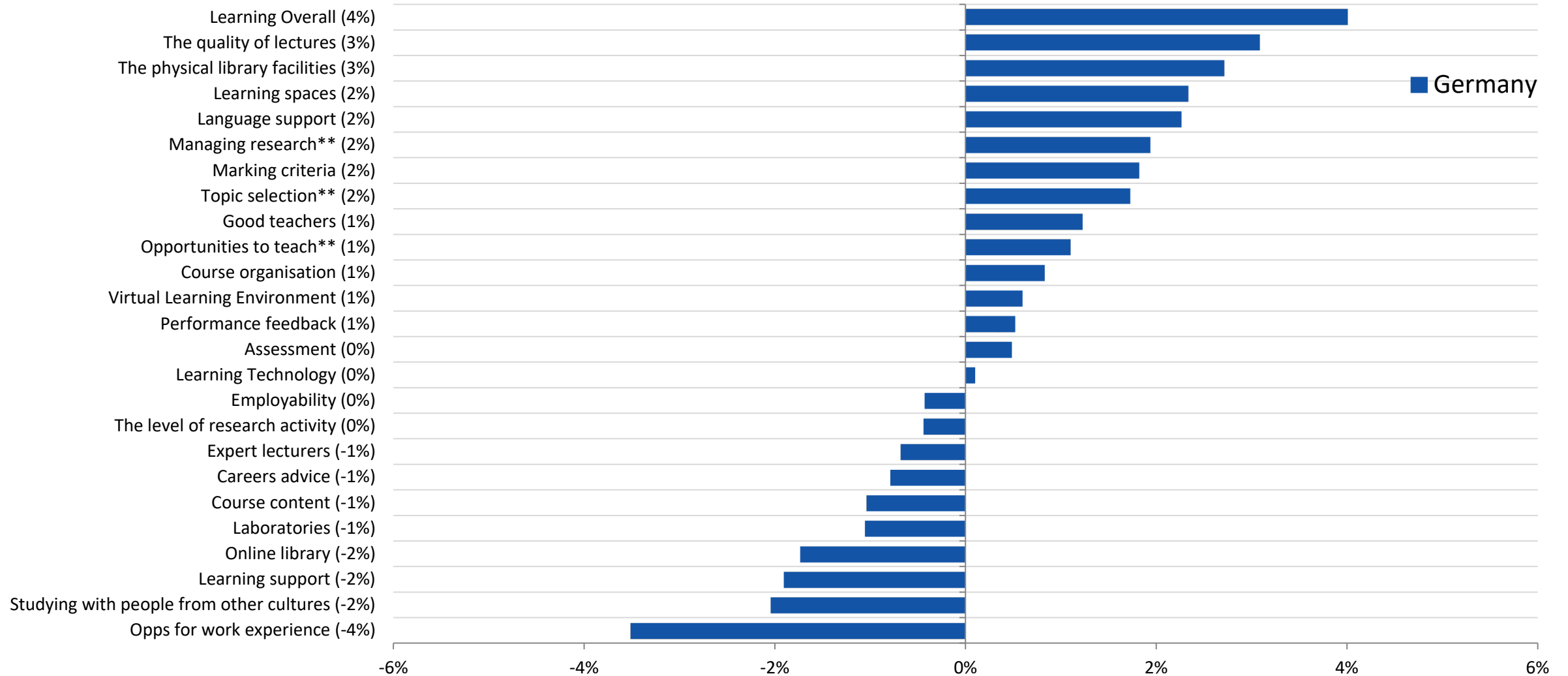
Benchmarking learning - Facilities

Germany		Global ISB			Europe ISB		
LEARNING AVERAGE	84%	88%	-4.1%		85%	-1.5%	
LEARNING OVERALL	89%	87%	1.4%		88%	0.9%	
FACILITIES							
Laboratories	91%	93%	-2.1%		92%	-1.7%	
On-campus facilities access	90%	88%	2.3%		92%	-1.2%	
Learning spaces	89%	92%	-3.1%		90%	-1.3%	
The physical library facilities	89%	93%	-3.9%		91%	-2.1%	
Online Study Materials	89%	91%	-2.2%		91%	-1.9%	
Virtual Learning Environment	88%	91%	-3.6%		90%	-2.1%	
Learning Technology	86%	92%	-5.5%		89%	-3.2%	
Online library	84%	91%	-7.5%		89%	-5.0%	

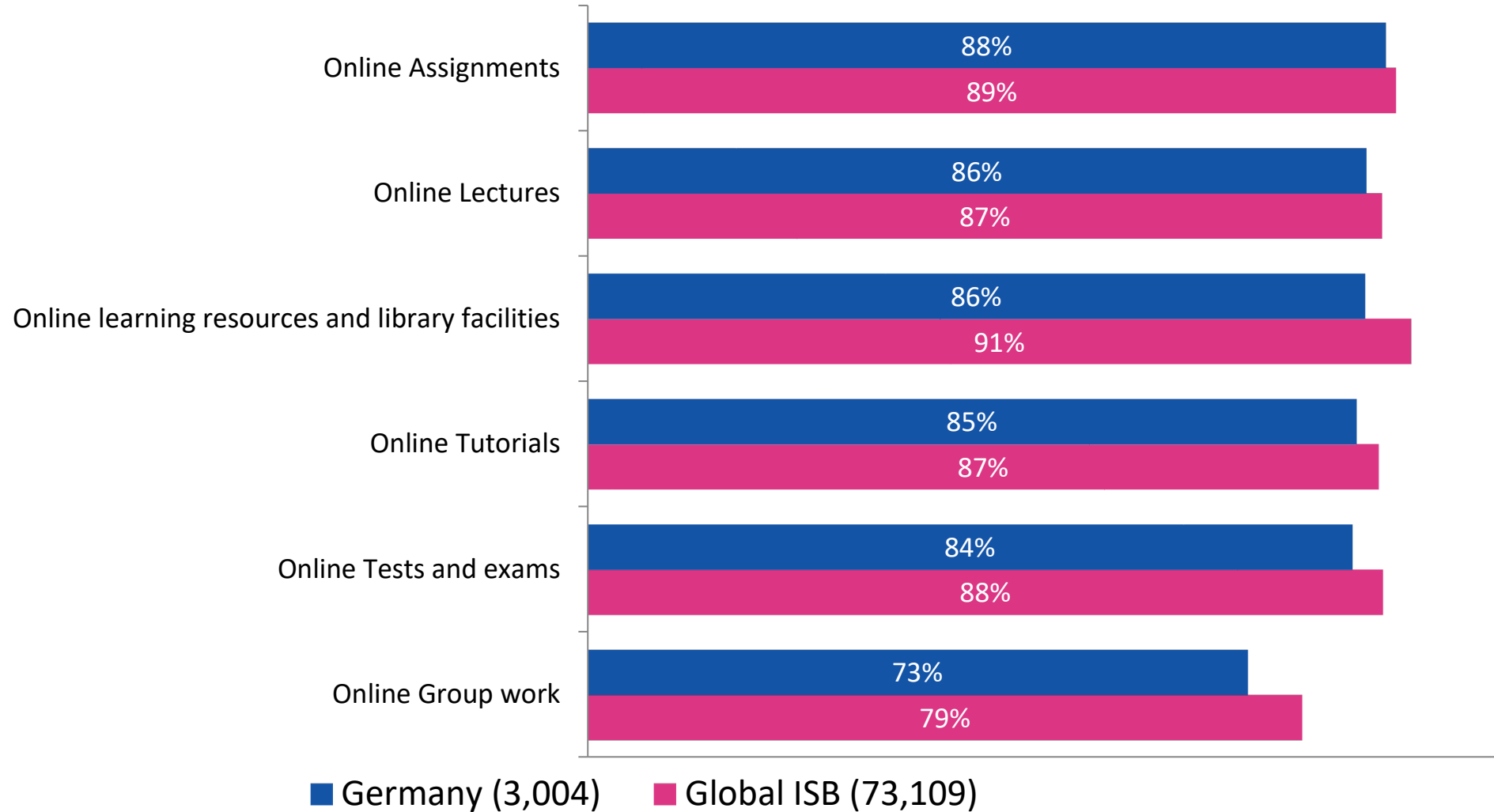
Derived importance - Learning



Learning satisfaction (year-on-year)



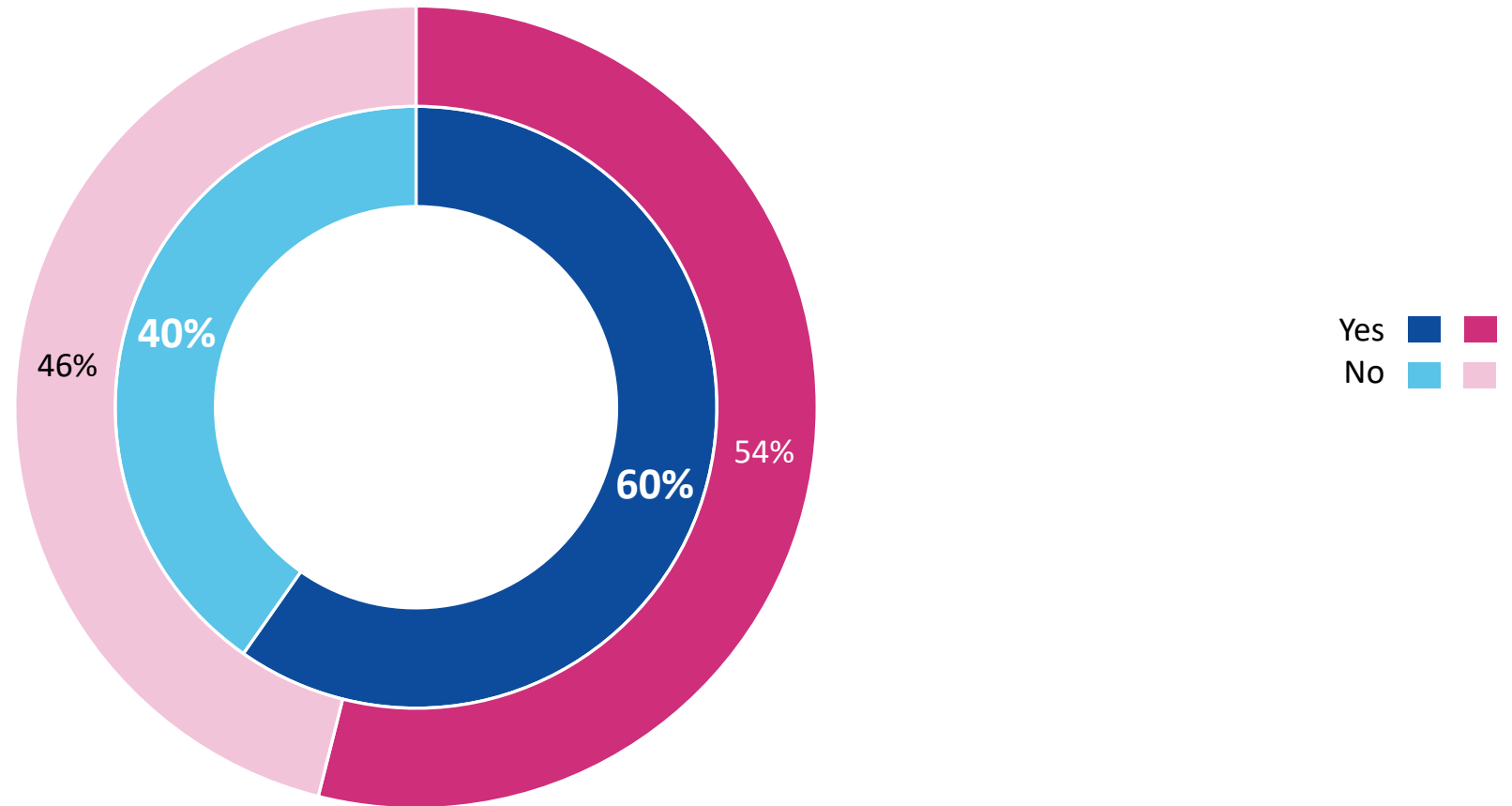
Online learning experience



How satisfied are you with the following aspects of your ONLINE LEARNING experience:

Online study

Germany (1,043, inner circle) vs Global ISB (36,858, outer circle)



Based on your current online study experience, would you choose to study online again in the future?

WHAT ARE THE LESSONS FROM THE ISB REGARDING THE LEARNING EXPERIENCE FOR GERMAN HIGHERED INSTITUTIONS?

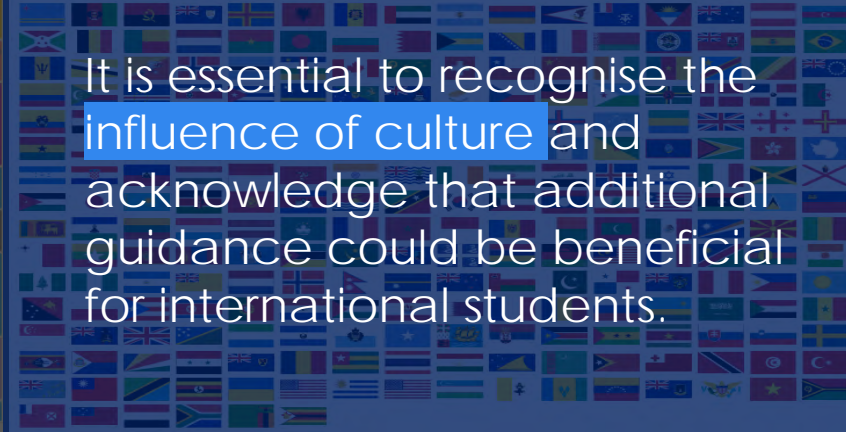


TOP

- ✓ Most international students surveyed are pleased with the level of education
- ✓ Tutors and lecturers are knowledgeable and engaging



TIP



It is essential to recognise the influence of culture and acknowledge that additional guidance could be beneficial for international students.



TOP TIP



EMPLOYABILITY is key for improvement.

"Learning that will help me get a good job"

9%

lower than the Global ISB benchmark

2%

lower than the European ISB benchmark

"Advice and guidance on long-term job opportunities and careers from academic staff"

13%

lower than the Global ISB benchmark

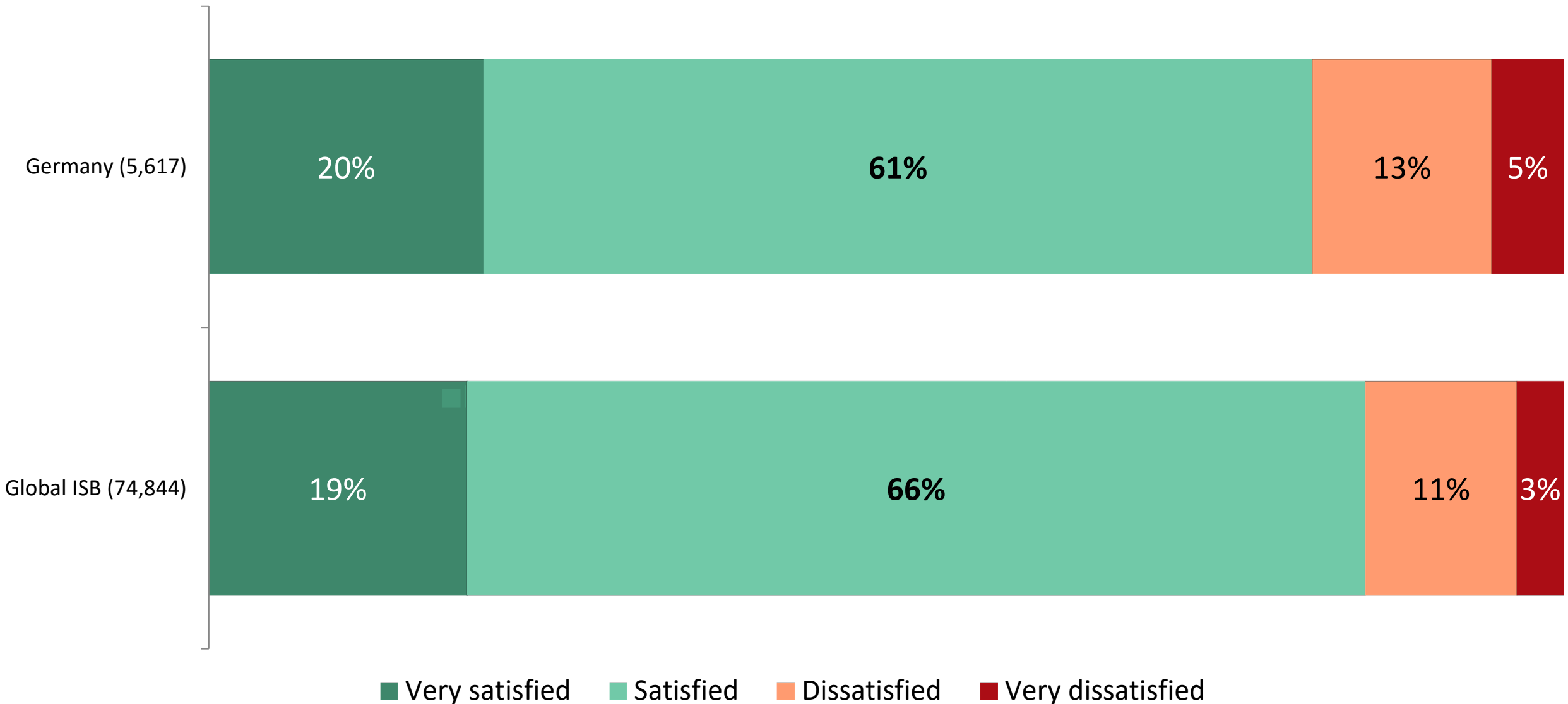
1%

lower than the European ISB benchmark

Living experience



Overall satisfaction - Living



Overall, how satisfied are you with the living experience at this stage in the year?

Benchmarking - Accommodation & living costs

	Germany		Global ISB		Europe ISB
LIVING AVERAGE	75%	80%	-4.9%		75% -0.7%
LIVING OVERALL	81%	85%	-3.9%		80% 1.1%
ACCOMMODATION & LIVING COSTS					
Internet access on campus	84%	90%	-5.5%		87% -3.0%
Internet access at my accommodation	82%	85%	-3.0%		84% -1.6%
The quality of accommodation	79%	82%	-3.5%		77% 1.1%
Living cost →	70%	63%	7.0%		51% 19.0% ↔
Access to suitable accommodation	69%	77%	-8.1%		63% 5.4%
Earning money	65%	62%	3.1%		58% 6.8%
The cost of accommodation →	64%	58%	6.2%		48% 16.3% ↔
Financial support	47%	57%	-10.0%		47% -0.3%
Finding accommodation	45%	45%	0.1%		45% 0.1%

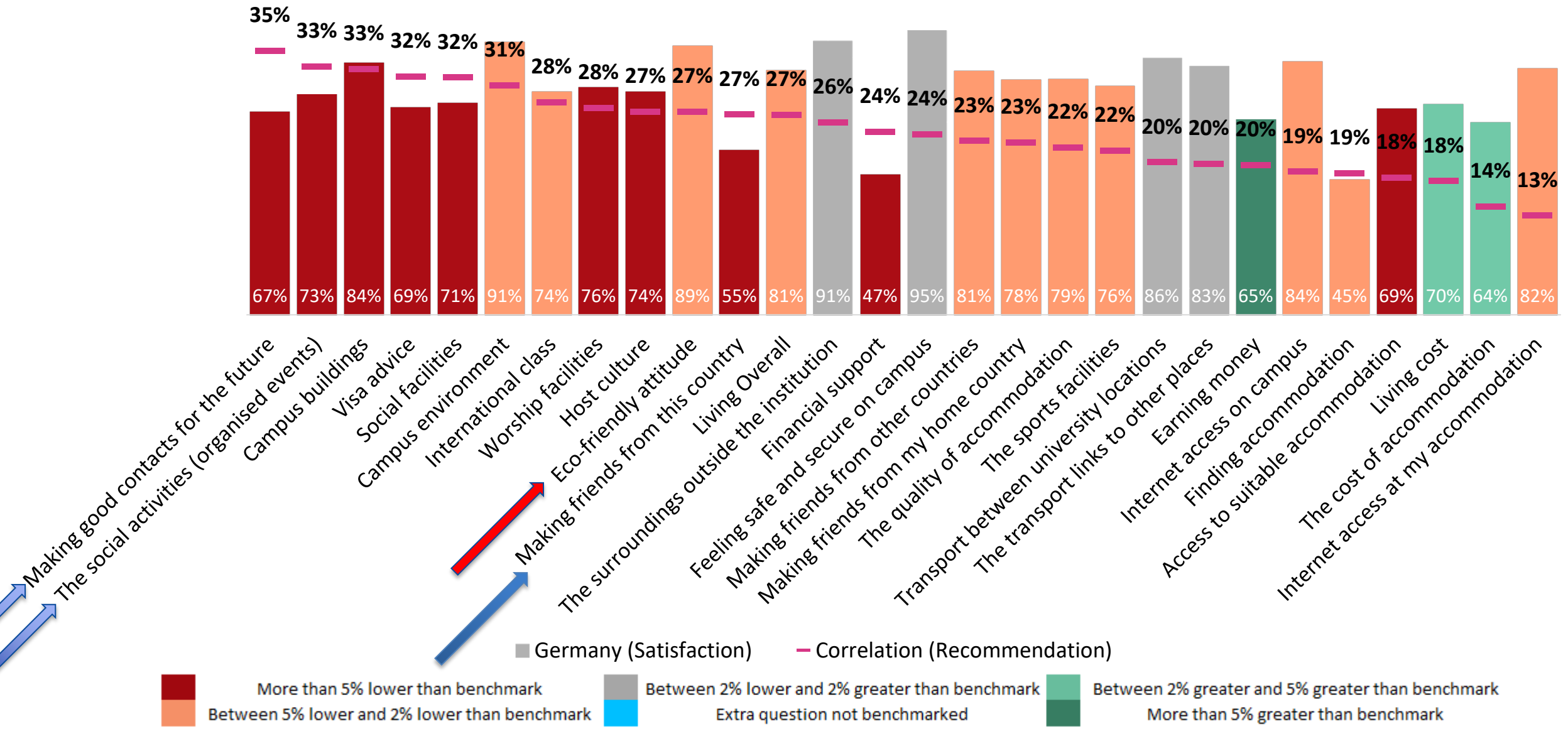
Benchmarking living - Social

	Germany		Global ISB		Europe ISB	
LIVING AVERAGE	75%	80%	-4.9%		75%	-0.7%
LIVING OVERALL	81%	85%	-3.9%		80%	1.1%
SOCIAL						
Making friends from other countries	81%	85%	-3.4%		87%	-5.6%
Making friends from my home country	78%	84%	-5.1%		80%	-1.8%
The sports facilities	76%	82%	-5.5%		81%	-5.0%
Host culture	74%	82%	-7.3%		78%	-3.5%
International class	74%	78%	-3.6%		78%	-3.6%
The social activities (organised events)	73%	82%	-8.8%		78%	-4.9%
Social facilities →	71%	84%	-13.3%		78%	-7.9%
Making good contacts for the future →	67%	78%	-11.0%		74%	-6.4%
Making friends from this country →	55%	71%	-15.8%		60%	-5.2%

Benchmarking living - Day to day life

Germany		Global ISB		Europe ISB	
LIVING AVERAGE	75%	80%	-4.9%	75%	-0.7%
LIVING OVERALL	81%	85%	-3.9%	80%	1.1%
DAY-TO-DAY LIFE					
Feeling safe and secure on campus →	95%	96%	-1.6%	97%	-2.1%
The surroundings outside the institution	91%	92%	-0.8%	93%	-1.9%
Campus environment	91%	94%	-2.9%	93%	-1.9%
Eco-friendly attitude	89%	92%	-2.3%	88%	1.3%
Transport between university locations	86%	86%	-0.9%	85%	0.8%
Campus buildings	84%	91%	-7.2%	88%	-4.0%
The transport links to other places	83%	85%	-2.3%	84%	-0.9%
Worship facilities	76%	89%	-13.2%	81%	-4.9%
Visa advice	69%	83%	-13.5%	75%	-6.1%

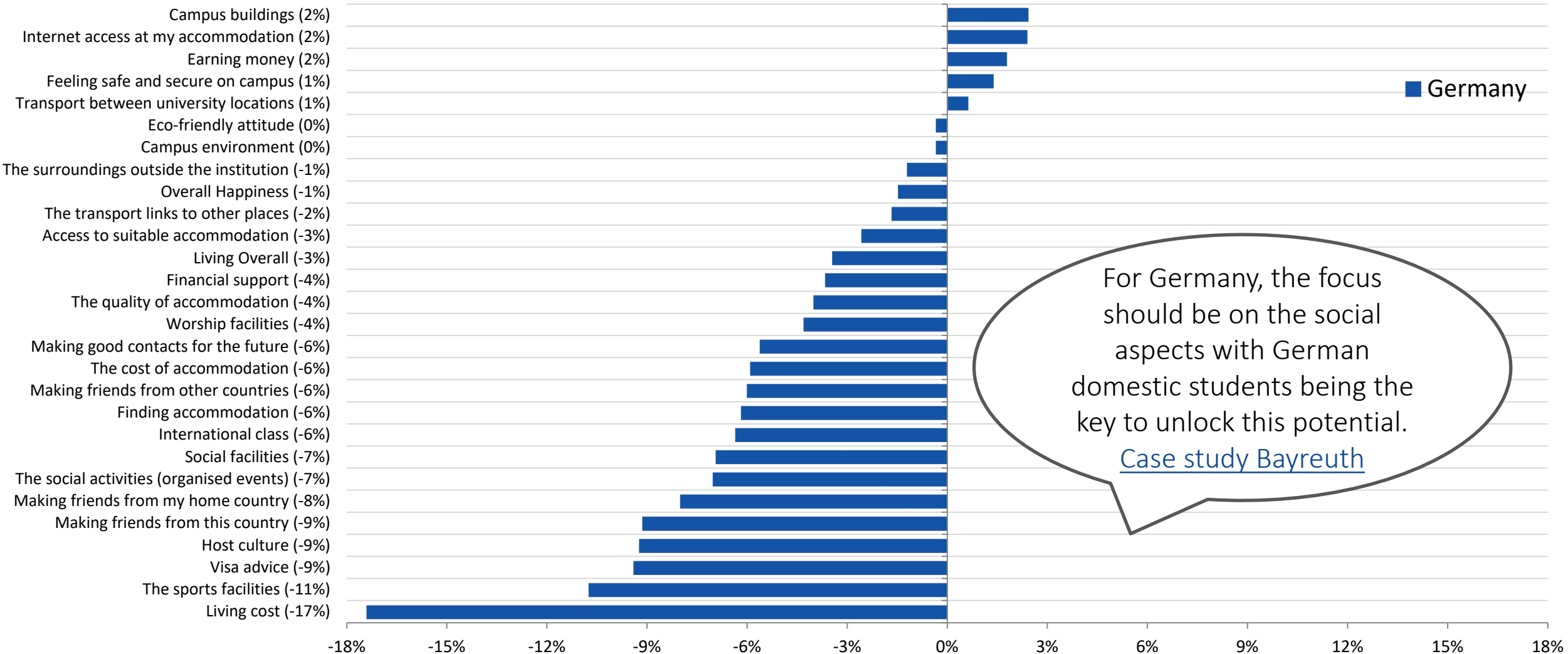
Derived importance - Living



Living satisfaction (year on year)

Worse in 2022

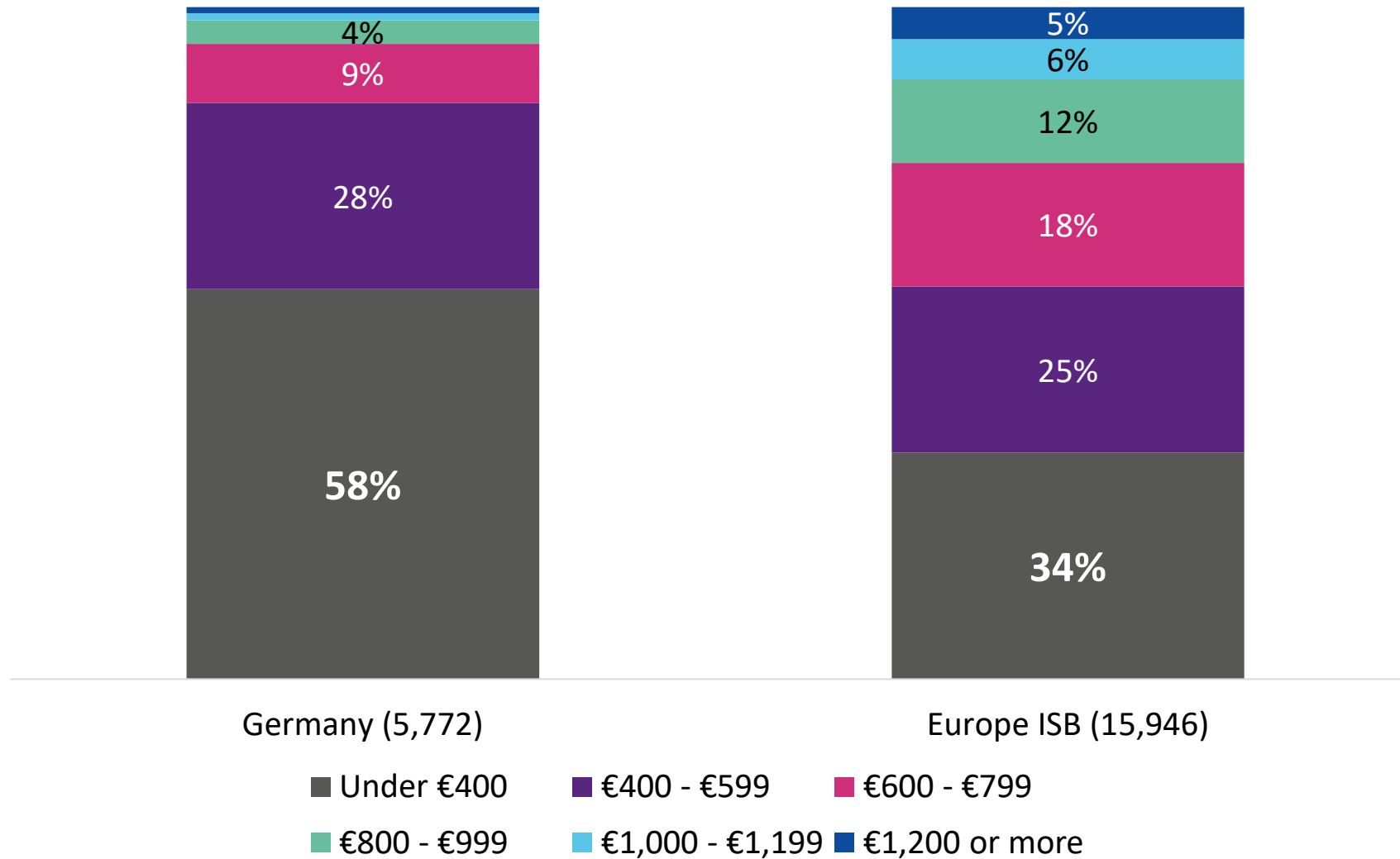
Better in 2022



For Germany, the focus should be on the social aspects with German domestic students being the key to unlock this potential.
[Case study Bayreuth](#)

*2022 vs 2018

Accommodation costs



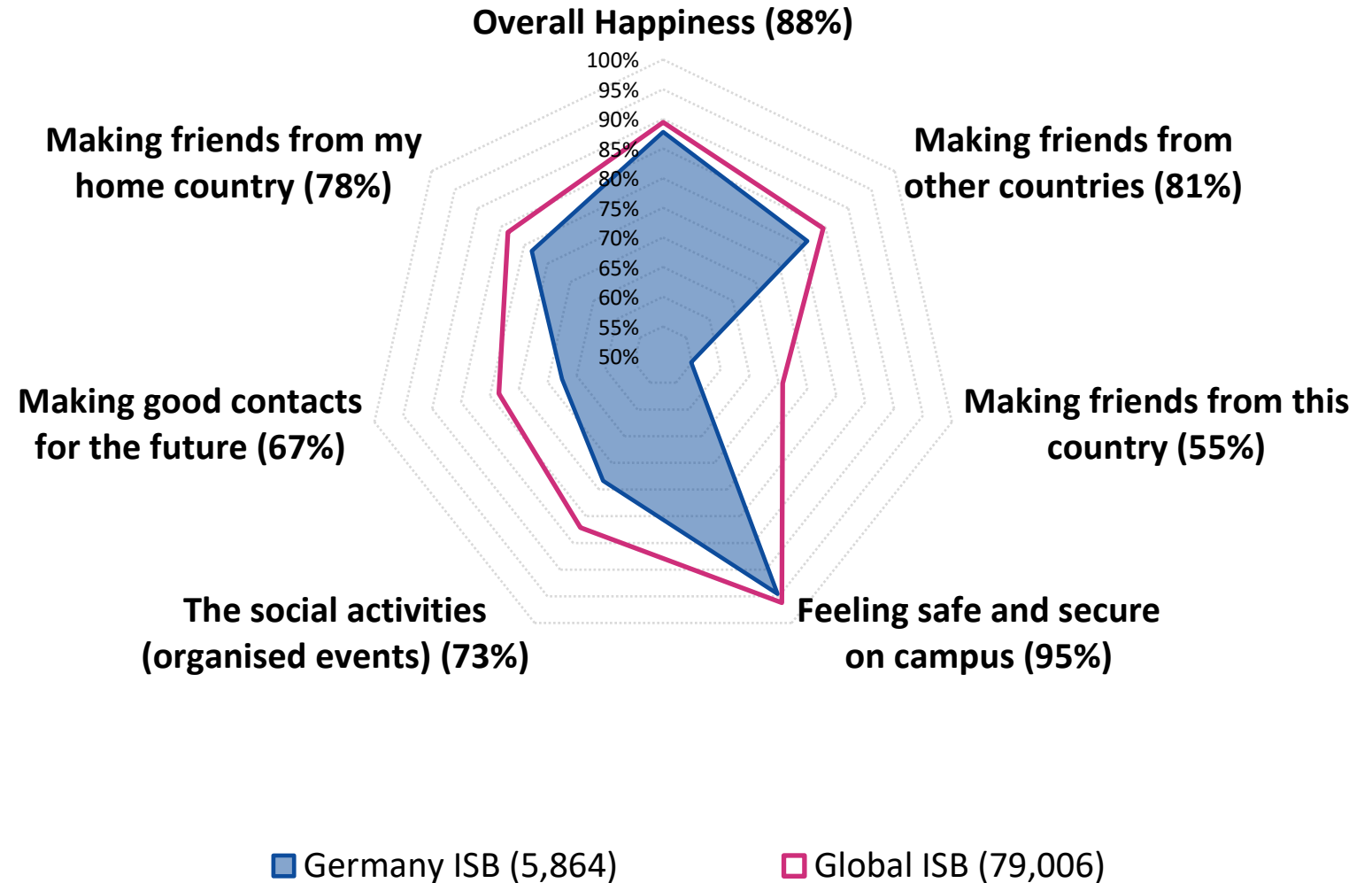
How much do you pay for your accommodation monthly? (exclude students 'Living at home' & 'Living with friends or relatives')

Wellbeing

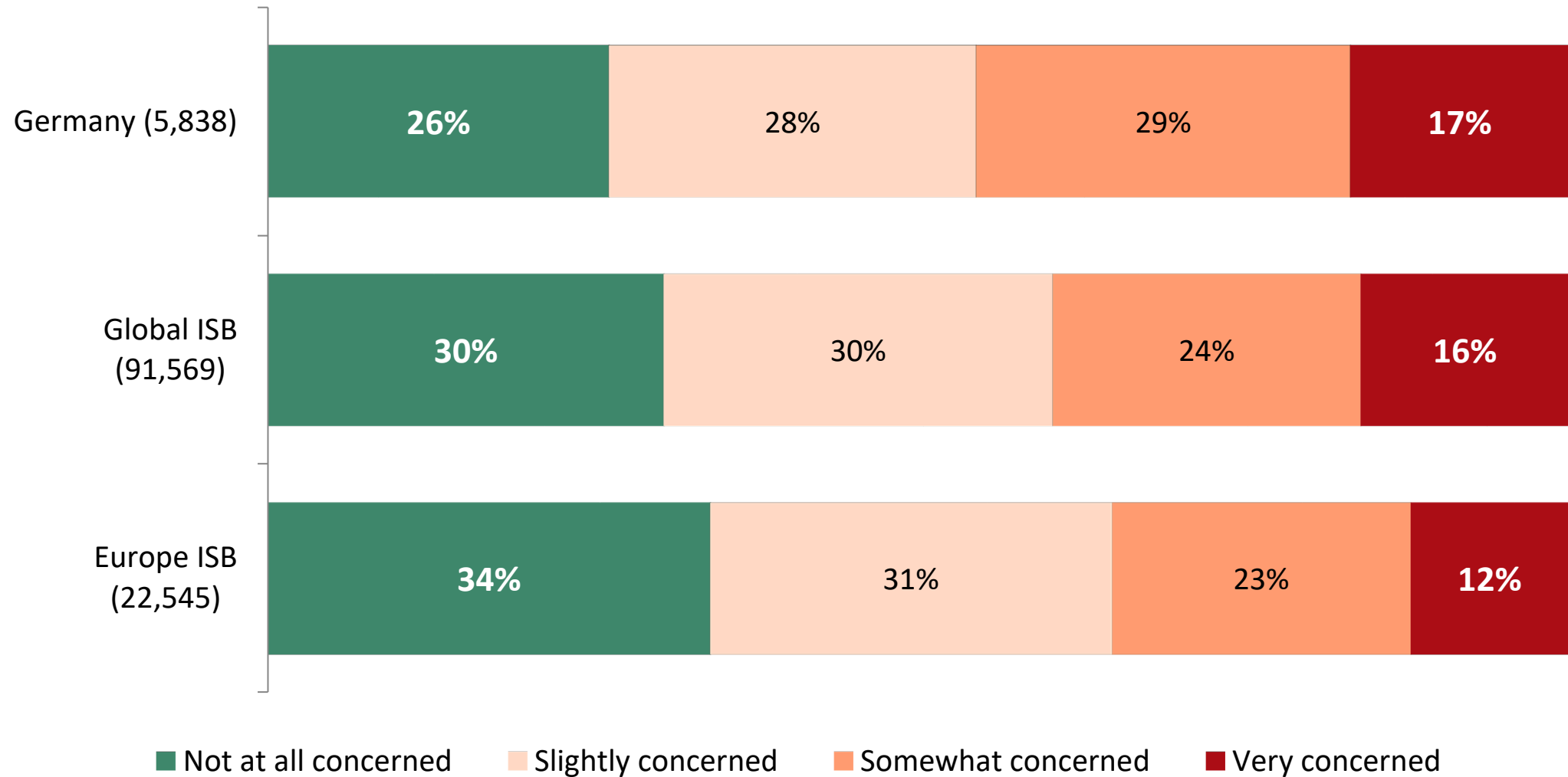


Student wellbeing

88% of your students are happy with their life at university so far, compared to **89%** in the Global ISB benchmark

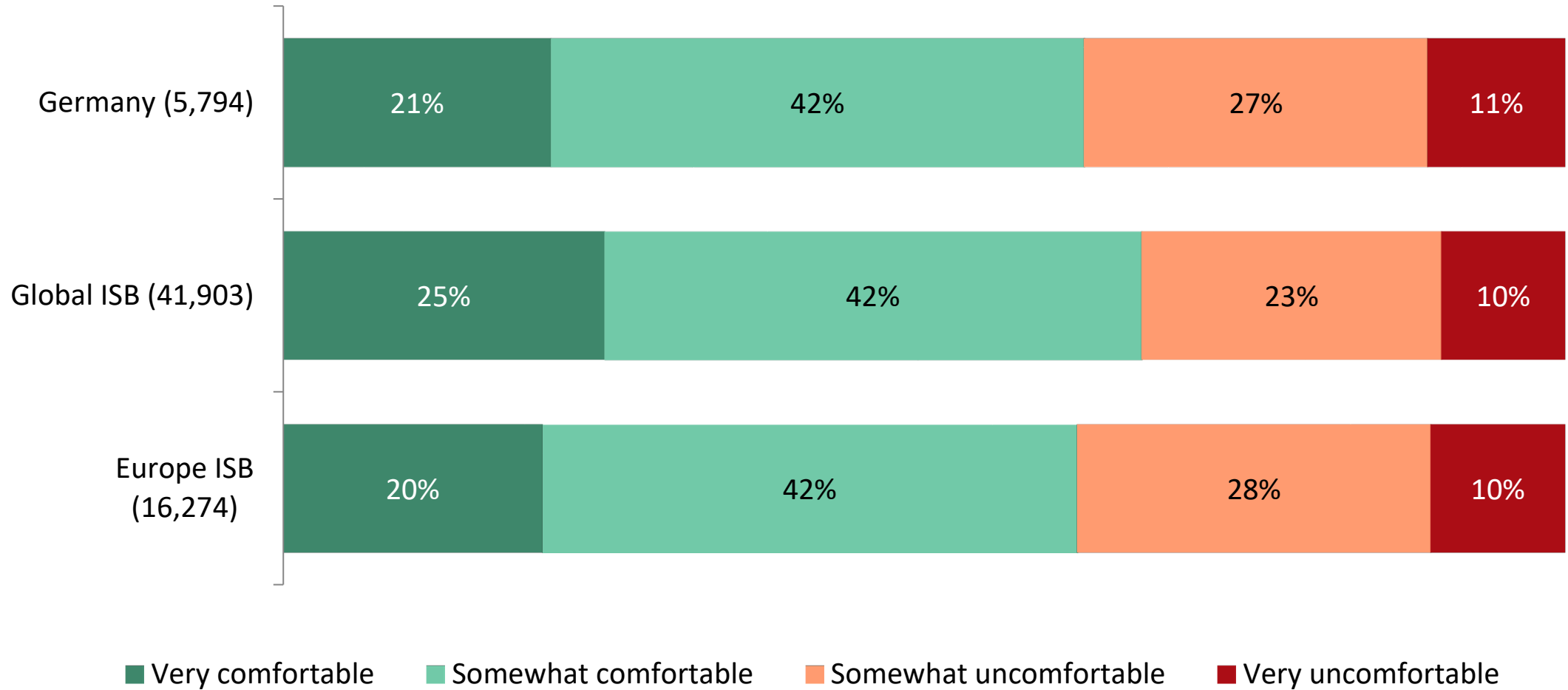


Student wellbeing - Concerns



Do you have any concerns about completing your studies?

Asking for mental health support



To what extent would you feel comfortable asking for mental health support from your university?

WHAT ARE THE LESSONS FROM THE ISB REGARDING THE LIVING EXPERIENCE FOR GERMAN HIGHERED INSTITUTIONS?



TOP

✓ Positive perception on student life in Germany



High-quality education



Safe environment



Low living costs

ROOM FOR IMPROVEMENT:

- Establish “good contacts for the future”
- “Making friends from this country”; aka the social aspects



TIP



Focus on the social aspects

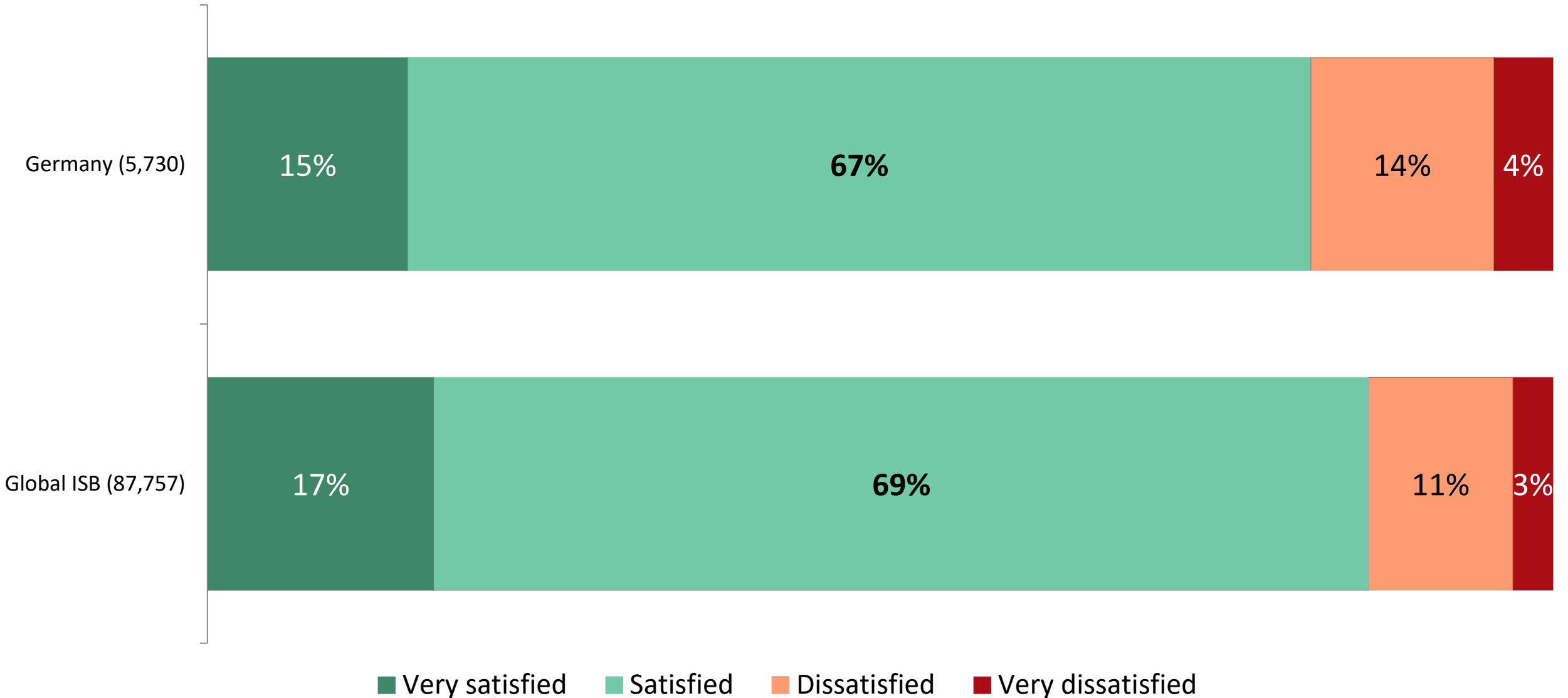
German students are the key to improving the connections between domestic and international students.

- To score better in the category “good contacts for the future”: institutions could for example opt to *arrange more guest lectures, more case studies, invite more (international) alumni* to **bring the world of work closer to the students.**

Support experience

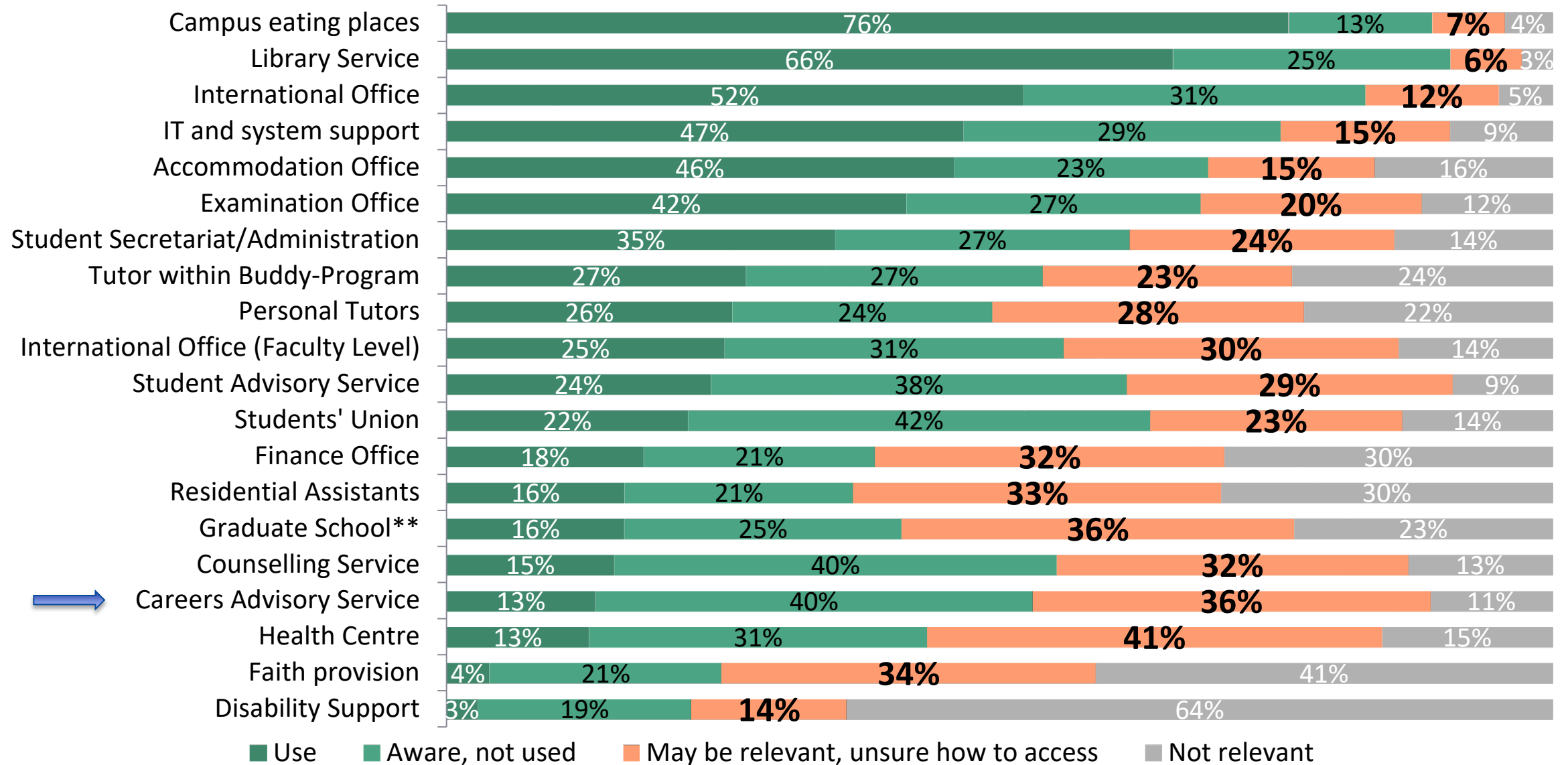


Overall satisfaction - Support



Overall, how satisfied are you with the support services at this stage in the year?

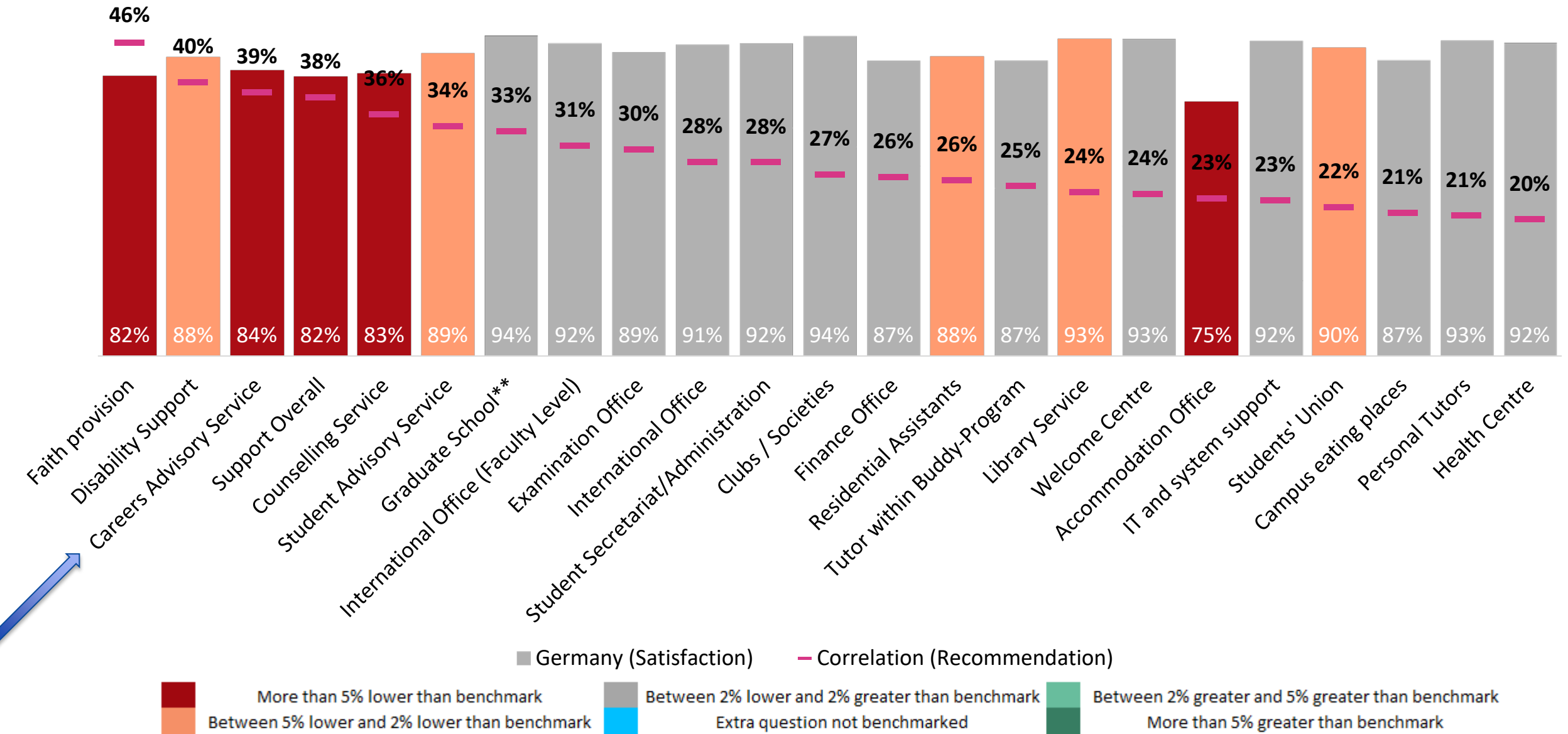
Support usage



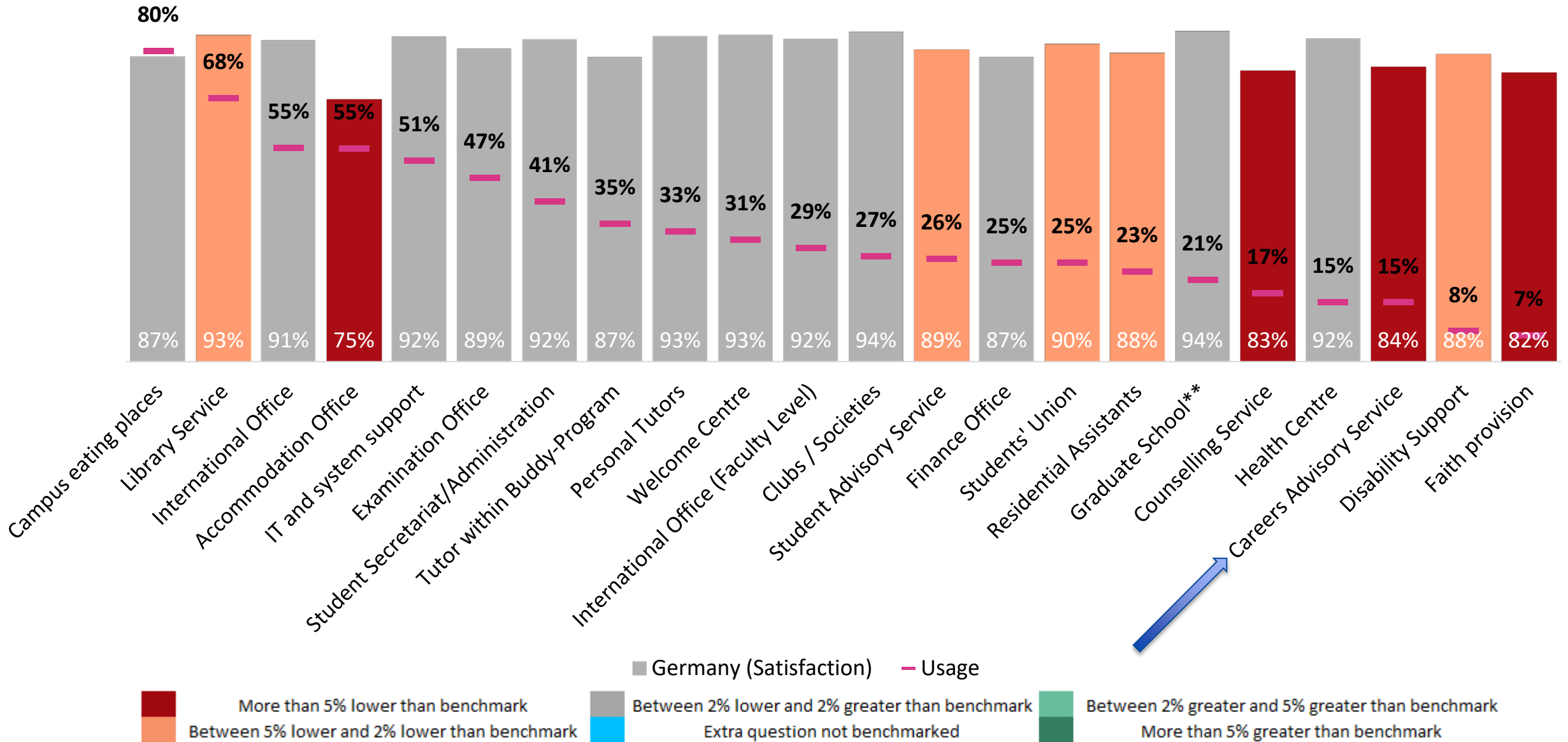
Benchmarking support

Germany		Global ISB		Europe ISB	
SUPPORT AVERAGE	89%	91%	-2.7%	88%	0.4%
SUPPORT OVERALL	82%	86%	-4.3%	84%	-2.3%
Graduate School**	94%	94%	-0.3%	93%	0.7%
Clubs / Societies	94%	94%	0.2%	94%	0.0%
Library Service	93%	96%	-2.8%	95%	-1.7%
Welcome Centre	93%	93%	0.0%	93%	0.0%
Personal Tutors	93%	94%	-1.8%	91%	1.7%
IT and system support	92%	93%	-0.9%	92%	0.9%
Health Centre	92%	91%	0.6%	84%	7.8%
International Office (Faculty Level) ←	92%	91%	0.5%	91%	0.5%
Student Secretariat/Administration	92%	92%	0.0%	92%	0.0%
International Office ←	91%	91%	0.3%	91%	0.7%
Students' Union	90%	94%	-4.0%	93%	-2.8%
Examination Office	89%	89%	0.0%	89%	0.0%
Student Advisory Service	89%	92%	-3.4%	89%	0.2%
Residential Assistants	88%	91%	-3.3%	85%	3.1%
Disability Support	88%	92%	-4.8%	86%	1.2%
Campus eating places	87%	88%	-0.8%	85%	2.0%
Tutor within Buddy-Program	87%	87%	0.0%	87%	0.0%
Finance Office	87%	88%	-1.0%	82%	4.4%
Careers Advisory Service ←	84%	90%	-5.9%	87%	-3.4%
Counselling Service	83%	89%	-6.4%	83%	0.2%
Faith provision	82%	94%	-12.2%	91%	-9.2%
Accommodation Office ←	75%	81%	-6.4%	72%	2.7%

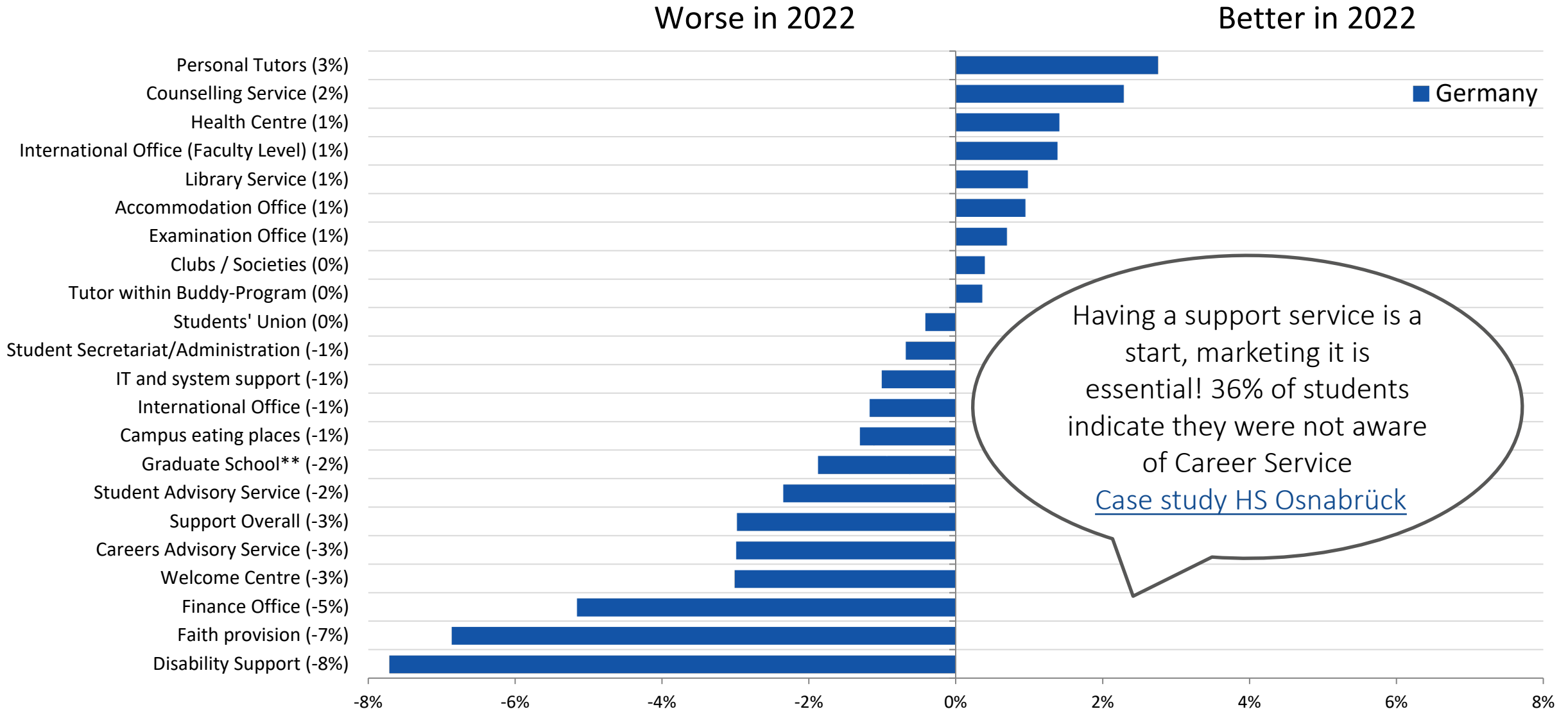
Derived importance - Support



Support Satisfaction vs. Usage



Support satisfaction (year-on-year)



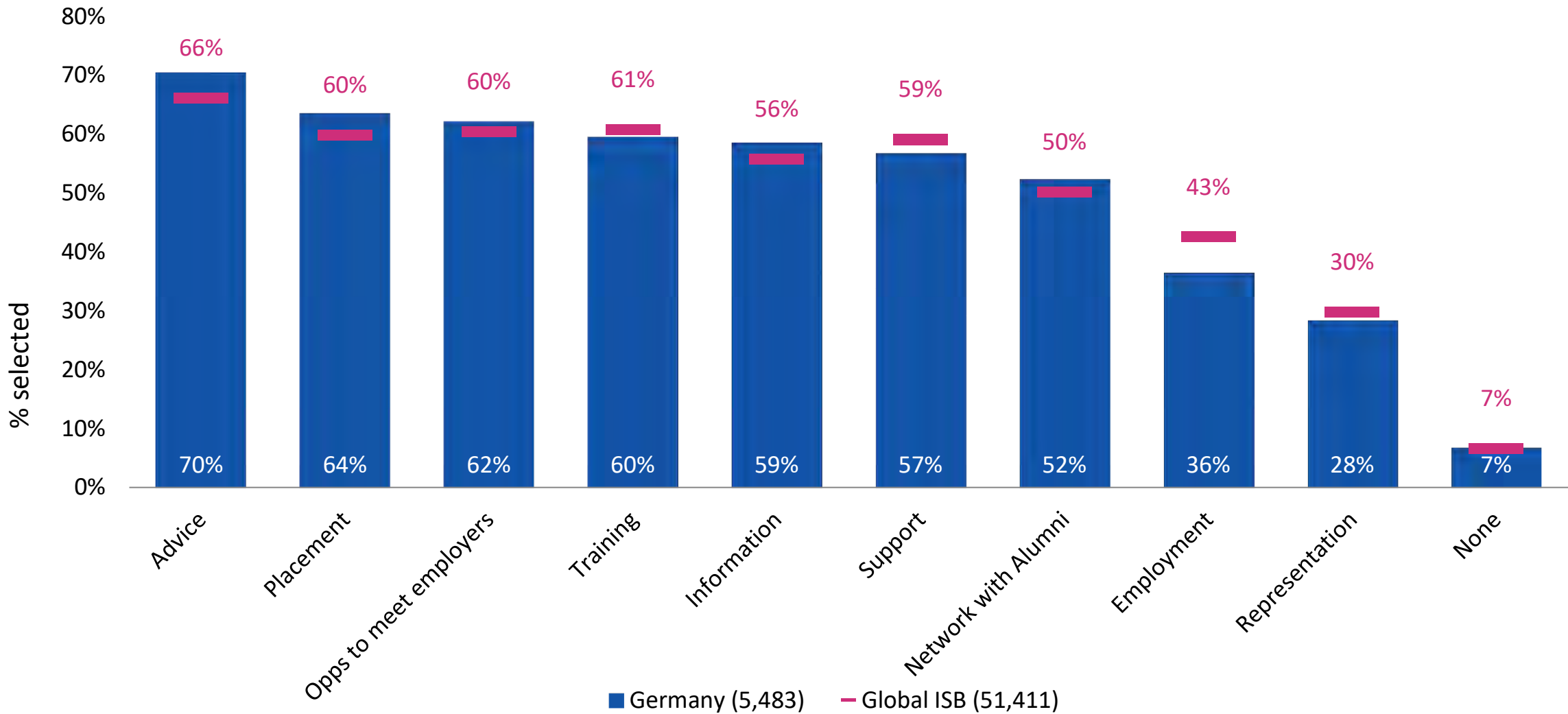
Having a support service is a start, marketing it is essential! 36% of students indicate they were not aware of Career Service
[Case study HS Osnabrück](#)

*2022 vs 2018

Careers and future plans

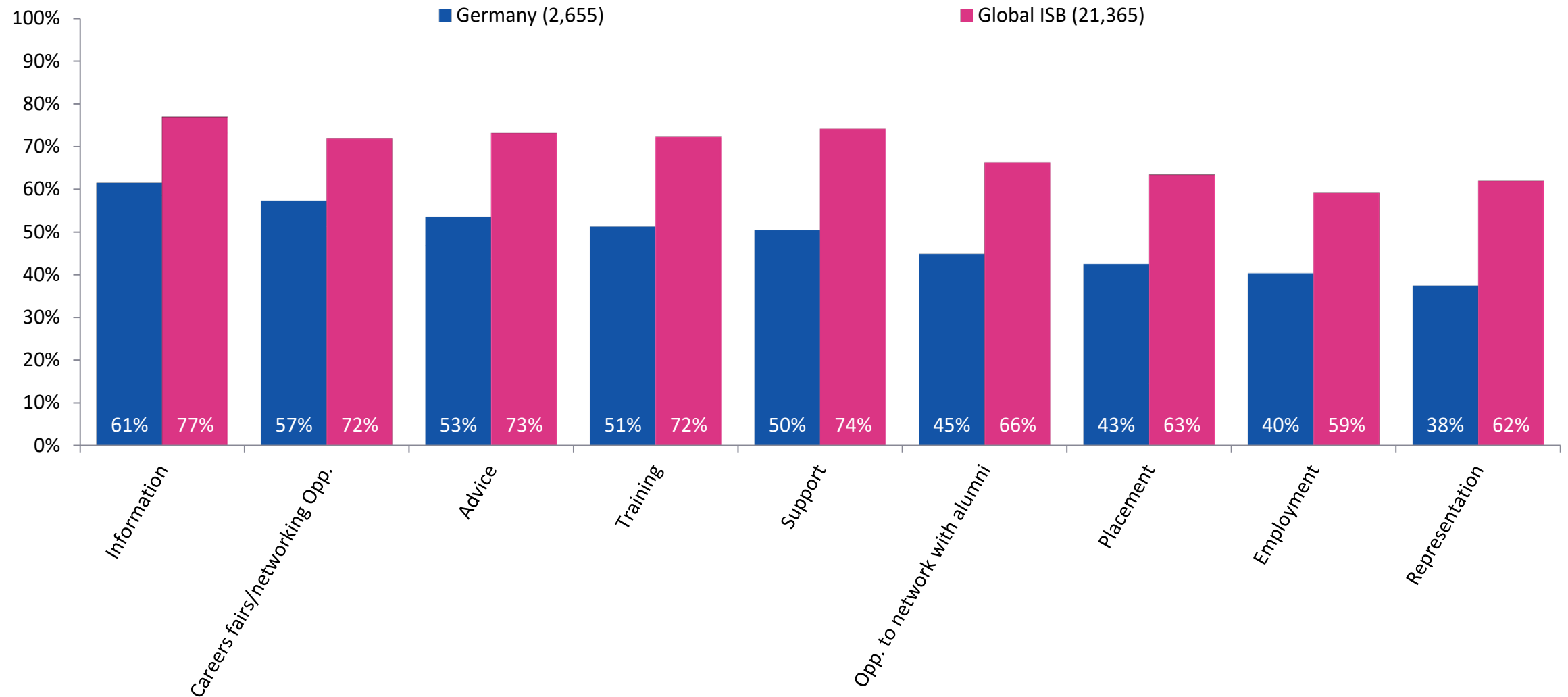


Careers support – Expectations



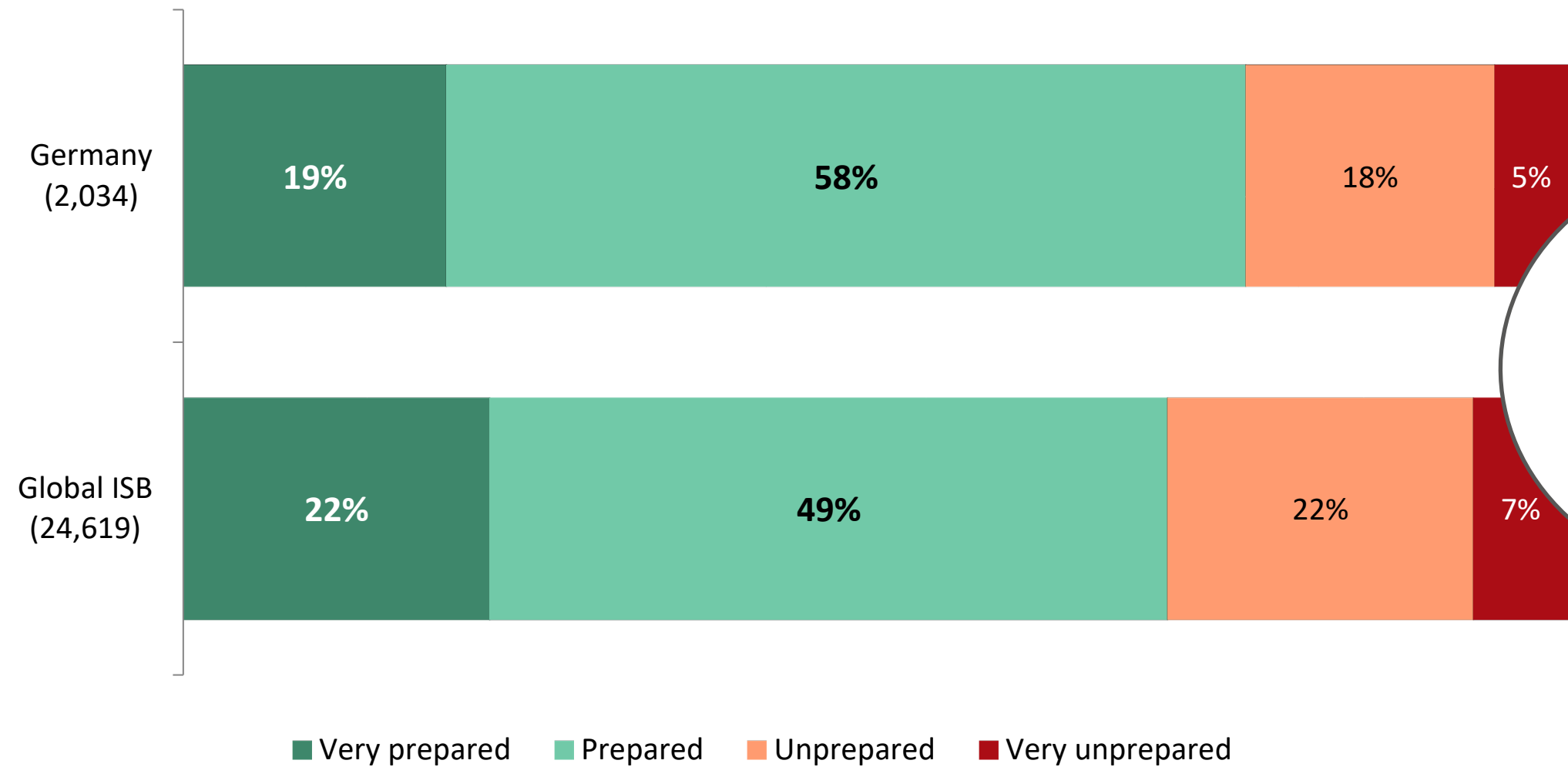
What employment / careers support do you expect from this institution? (Excludes exchange students)

Careers support – Satisfaction



How satisfied are you with the following types of employment / careers support from this institution: (Excludes first/single year students)

In the end, students are prepared for their Career Goals



However, more need for 24/7 careers information - understanding how job hunting works in Germany (and elsewhere) will pay off for a generation focused on employability
See video [What will get your students hired](#)

To what extent do you feel your experience at this institution has prepared you for your career goals? (Final year students only)

WHAT ARE THE LESSONS FROM THE ISB REGARDING THE SUPPORT EXPERIENCE FOR GERMAN HIGHERED INSTITUTIONS?

IMPROVEMENT

Support services is a weak area for German Higher Education Institutions

4%

lower than the Global ISB benchmark



TIP #1

ACCOMMODATION OFFICE

Intensify cooperation between higher education institution and the accommodation office.



TIP #2

CAREERS SERVICES

3rd most important aspect for student experience recommendation in Germany.



Although many German institutions are working hard to improve on this area, understanding the varying needs of (different groups of) international students and the cultural biases around asking for (careers guidance) support are critical elements to consider.

Conclusions



WHAT MAKES INTERNATIONAL STUDENTS RECOMMEND THEIR GERMAN HIGHERED EXPERIENCES?



TOP

✓ Germany outperforms in good value for money

8%

higher than the Global ISB benchmark



Low costs of living



Student accommodation



(Low) tuition fees

NOTE:

Focus on the ultimate benefits of a German higher education: namely a **high-quality academic degree**.

The link to the world of work is essential.

WORRY

- Room for improvement in all phases of the student-cycle to ensure that Germany keeps its position as the top destination.
- Recommendation likelihood has declined over time.



TIP



Guidance and support to bridge gap between academic learning and the professional field.



Provide support and resources for job search strategies such as CV and cover letter writing, interview skills and networking strategies.

5 RECOMMENDATIONS FOR GERMAN HIGHERED INSTITUTIONS BASED ON THE ISB

1

EMPLOYABILITY

The link to the (constant changing) world of work is essential. Integrate employability into curricula (UWN [article John Hudzik](#))

2

CAREERS ADVICE

Make lecturers aware of the importance of work field: case studies & guest lectures (bring in alumni!)

3

CAREERS SUPPORT

24/7 support on global job-hunting issues, but not brought 'as you need' but as 'this may be helpful' – [CareerProfessor](#)

4

SUSTAINABILITY

Environmental issues are getting more common as 'decision-making' factor: 68% of international students in Germany mentions it in their decision-making process – [Climate Action Barometer](#)

5

CONNECTING TO GERMANS

International students want to integrate, help them connect with German students from the start (not once started) – [Goin](#)

TOP RECOMMENDATION FOR THE GERMAN HIGHERED BASED ON THE ISB

THE WINNING FORMULA



Management summary

Germany is a **popular study destination**: High quality education with pathway to career.

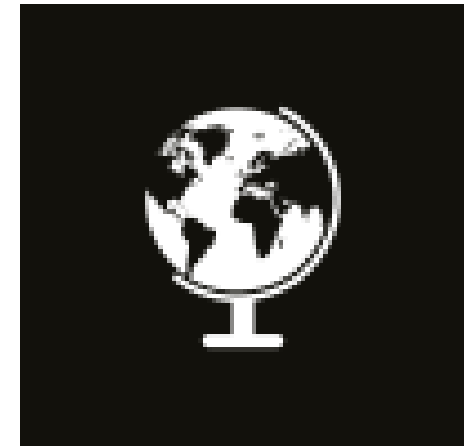
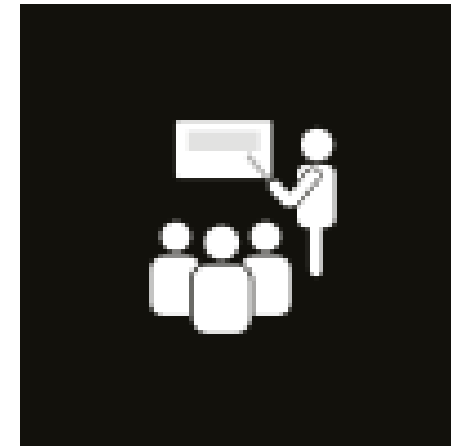
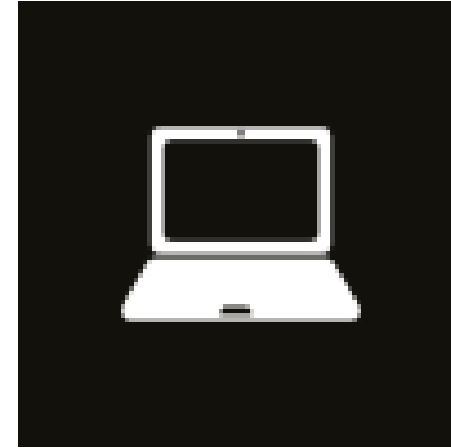
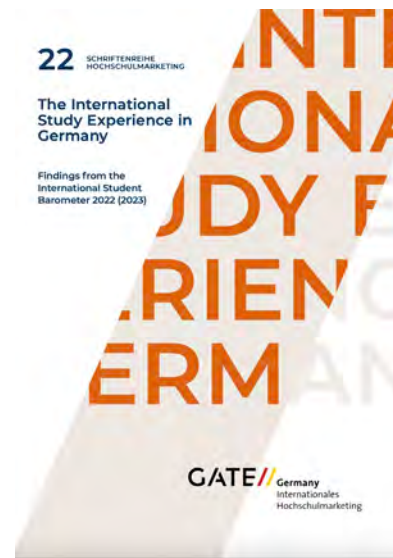
Arrival satisfaction has improved considerably in comparison with ISB 2018.

97% is **satisfied** with academic standards in learning experience.

Room for improvement re 'making friends from this country' & 'good contacts for the future'.

Support services: the accommodation office (*Studierendenwerk*) can be improved as well as career services.

Employability is key: strengthen career support & connection between curricula and world of work.



TRIBAL

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