

Findings of the DAAD Snapshot Survey on enrolment figures of international students in the 2023/24 winter semester

(as of 20 December 2023)

Summary of the most important findings

- According to the DAAD forecast, there will be an increase in **newly enrolled international students** (1st university semester) from around 80,000 in the 2022/23 winter semester to around 85,000 to 92,000 students in the 2023/24 winter semester (see Table 1). This corresponds to a relative increase of around six to 15 per cent. Unlike in previous years, however, this growth is primarily due to the development of degree-seeking students (see Table 3). Almost half of the higher education institutions surveyed reported significantly increasing numbers of both bachelor's degree and master's degree students, with only one fifth reporting declining numbers (see Tables 4 and 5).
- According to the DAAD forecast, the **total number of international students** in the winter semester 2023/24 will rise from around 368,000 in the winter semester 2022/23 to around 380,000 to 390,000 students in the 2023/24 winter semester, thus reaching another record high (see Table 1). This increase corresponds to a relative rise of around four to six per cent and is therefore likely to be at a similar level to the previous year (+5%).
- The positive trend from the previous year is confirmed and reinforced in the **development of the number of newly enrolled regular international students** (see Table 2): In all university clusters¹, the number of higher education institutions reporting rising numbers is once again higher than the number of institutions reporting falling numbers. This finding is particularly clear in the large universities of applied sciences (UAS) and the technical universities. In each of these two university clusters, more than half of the higher education institutions report increasing numbers of new enrolments of degree-seeking international students.
- In contrast to the previous year, there are **hardly any differences between the bachelor's and master's degree programmes** in terms of the development of newly enrolled international students. The normalisation of the trend following the COVID-19 pandemic now also appears to have arrived in the bachelor's degree programmes, where there were significantly less momentum than in the master's degree programmes in the previous year. An important reason for the slower recovery of new enrolments in the bachelor's degree programmes may have been the fact that the pandemic-related travel restrictions had created a gap in the number of preparatory colleges for international students in Germany. The results of the current DAAD Snapshot Survey suggest that this gap has now been closed again. In the bachelor's degree programmes, the universities (including technical universities) and the large universities of applied sciences in particular reported an increase in the number of newly enrolled international students. In the

¹ A distinction is made between small universities ($\leq 20,000$ students), large universities ($> 20,000$ students), small universities of applied sciences ($\leq 5,000$ students), large universities of applied sciences ($> 5,000$ students), technical universities and colleges of art and music.

master's degree programmes, this applies mainly to the technical universities and the large UAS.

- A striking difference compared to the previous year can be seen in the **number of newly enrolled guest and exchange students (not intending to graduate in Germany)** (see Table 5). In the previous year, the number of higher education institutions that reported increasing numbers of new enrolments among these students was significantly higher in all university clusters than the number of higher education institutions that reported falling numbers. This now only applies to the UAS and the colleges of art and music. In the other university clusters, however, more higher education institutions reported declining numbers of new enrolments of international guest and exchange students. It can be assumed that this is also a normalisation effect in the aftermath of the COVID-19 pandemic. The significant increase in the previous year is likely to have been part of a "catch-up effect", i.e. a large proportion of the guest and exchange stays started last year were probably stays that could only be completed later than originally planned due to the pandemic. This catch-up effect now seems to have largely come to an end, which is why many higher education institutions are now seeing a decline in new enrolments of international guest and exchange students compared to the above-average numbers of the previous year.
- A **look at the ten most important countries of origin** (see Table 6) reveals the following developments: The higher education institutions surveyed reported an increase in newly enrolled students from India and Turkey and, in particular, from Iran and Pakistan. In contrast, the majority of higher education institutions reported decreases in new enrolments compared to the previous year with regard to students from China, Syria, Austria, Russia, Italy and Ukraine. However, the ratio of higher education institutions with decreasing and increasing numbers is much more balanced in these six countries than in the four countries with mostly increasing numbers. It can therefore be assumed that the (rather slight) declines in some of the most important countries of origin are more than compensated for by the (strong) increases in other important countries of origin.
- In light of the new Bavarian Higher Education Act, all higher education institutions in **Bavaria** were asked about their **plans to introduce tuition fees for international students from non-EU countries** as part of this year's Snapshot Survey. Of the 20 Bavarian higher education institutions that took part in the survey, three stated that they had already decided to introduce tuition fees for non-EU students. Six other higher education institutions stated that they had not yet made a decision in this regard. The remaining eleven higher education institutions stated that they had decided against introducing such tuition fees. There are a total of 56 state-recognised higher education institutions in Bavaria; the universities surveyed here are not a representative cross-section.

Table 1: Extrapolation of the total number of international students

Reference group	WS 2021/22	WS 2022/23	WS 2023/24 (forecast)	Change
Newly enrolled international students	73,889	80,113	85,000-92,000	+6% to +15%
Total international students	349,438	367,578	380,000-390,000	+4% to +6%

Table 2: Development of the number of newly enrolled international degree-seeking students (intending to graduate in Germany) according to the higher education institutions surveyed (in %)

University cluster	Decrease		Stable	Increase	
	over 10%	5 to 10%	-4 to +4%	5 to 10%	over 10%
Small universities ($\leq 20,000$ students)	15	7	37	22	19
Large universities ($> 20,000$ students)	12	12	32	20	24
Small UAS ($\leq 5,000$ students)	13	16	34	13	24
Large UAS ($> 5,000$ students)	10	5	33	13	38
Technical universities	7	14	21	21	36
Colleges of art and music	11	5	58	11	16
Total (extrapolation)	11	10	32	18	29

Table 3: Development of the number of newly enrolled international degree-seeking students (intending to graduate in Germany) in the bachelor's degree programme according to the higher education institutions surveyed (in %)

University cluster	Decrease		Stable	Increase	
	over 10%	5 to 10%	-4 to +4%	5 to 10%	over 10%
Small universities ($\leq 20,000$ students)	12	4	32	20	32
Large universities ($> 20,000$ students)	13	8	29	4	46
Small UAS ($\leq 5,000$ students)	14	8	43	14	22
Large UAS ($> 5,000$ students)	8	3	41	15	33
Technical universities	23	8	23	15	31
Colleges of art and music	6	13	63	6	13
Total (extrapolation)	13	6	34	12	35

Table 4: Development of the number of newly enrolled international regular students (intending to graduate in Germany) in the master's degree programme according to the higher education institutions surveyed (in %)

University cluster	Decrease		Stable	Increase	
	over 10%	5 to 10%	-4 to +4%	5 to 10%	over 10%
Small universities ($\leq 20,000$ students)	23	12	23	15	27
Large universities ($> 20,000$ students)	12	12	36	24	16
Small UAS ($\leq 5,000$ students)	24	18	29	9	21
Large UAS ($> 5,000$ students)	16	8	24	22	30
Technical universities	8	8	23	8	54
Colleges of art and music	13	0	56	25	6
Total (extrapolation)	15	11	29	18	28

Table 5: Development of the number of newly enrolled international guest/exchange students (not intending to graduate in Germany) according to the higher education institutions surveyed (in %)

University cluster	Decrease		Stable	Increase	
	over 10%	5 to 10%	-4 to +4%	5 to 10%	over 10%
Small universities ($\leq 20,000$ students)	27	15	35	8	15
Large universities ($> 20,000$ students)	25	29	33	8	4
Small UAS ($\leq 5,000$ students)	19	3	36	11	31
Large UAS ($> 5,000$ students)	13	8	42	8	29
Technical universities	36	14	43	7	0
Colleges of art and music	11	0	58	21	11
Total (extrapolation)	23	16	38	9	14

Table 6: Development of the total number of newly enrolled international students by most important countries of origin according to the higher education institutions surveyed (in %)

Country of origin	Decrease		Stable	Increase	
	over 10%	5 to 10%	-4 to +4%	5 to 10%	over 10%
India	26	5	28	10	32
China	26	7	38	5	24
Syria	26	10	42	4	18
Austria	19	8	51	5	17
Turkey	15	3	41	10	31
Iran	17	7	28	16	33
Russia	27	10	36	7	21
Italy	24	6	48	5	18
Ukraine	30	8	29	9	24
Pakistan	9	7	33	13	38

Methodology

- **The figures presented here are based on** a Snapshot Survey conducted by the DAAD between 29 November and 13 December 2023 among the heads of the International Offices of 321 state-recognised universities, universities of applied sciences and colleges of art and music in Germany (theological universities and universities of administrative sciences, where hardly any international students are enrolled, were not surveyed). 172 higher education institutions took part in the survey (gross response rate: 54 per cent). 170 of the 172 questionnaires were usable for the evaluation (net response rate: 53 per cent). Around 68 per cent of all international students in Germany in the 2022/23 winter semester were enrolled at the 170 higher education institutions included in the calculations for the DAAD Snapshot Survey.
- International students are defined here as **students with foreign citizenship and a higher education entrance qualification from abroad**. These are referred to by the Federal Statistical Office and the Statistical Offices of the federal states as “Bildungsauslaender”.
- To **extrapolate the survey data to the whole of Germany**, the higher education institutions surveyed were divided into six university clusters. Their shares in the population of all state-recognised higher education institutions from the three types of higher education institutions surveyed served as weights for the extrapolation of the cluster values from the survey and the forecasts of the absolute number of students.
- **Important:** As these are projection and forecast data, it cannot be ruled out that there may be deviations from the final enrolment figures.