

## Fall 2013 International Student Snapshot Survey: A Brief Report

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Prepared by: IIE Center for  
Academic Mobility Research  
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## Fall 2013 Snapshot Survey of International Students: A Brief Report

What is the status of international enrollments on U.S. campuses for the current 2013 academic year? Where are institutions seeing growth and declines? What is the broader context for these changes both in terms of specific recruitment and internationalization efforts on campuses, as well as how institutions are serving specific groups of international students? It is these contextual questions that a collaborative survey effort by eight U.S. higher education associations attempts to address. While distinct from and complementary to *Open Doors*, the findings from this fall “snapshot” survey are released jointly with *Open Doors* data<sup>1</sup>, in an effort by the U.S. higher education community to provide a forward-looking, top-line view of international student enrollment trends contextualized by campus perspectives for the current academic year.

### A snapshot of international student enrollment in 2013

Conducted in October 2013, the joint online survey by eight leading U.S. higher education associations found that 72% (274) of member campuses that responded report that the total number of international students enrolled at their institutions increased in fall 2013 compared to the previous year’s enrollment totals. On average, responding institutions saw a growth of approximately 13%, with more growth occurring at the undergraduate level. It should be noted however, that this increase is based on early estimates provided by 380 responding institutions for Fall 2013, and that the sample size is substantially smaller than the close to 3,000 institutions that are covered by the annual *Open Doors* survey, and therefore does not reflect the complete and final picture for 2013/14 international enrollments. A more comprehensive view will be reported in *Open Doors* 2014 when it is released in November 2014.

In addition to 7% growth for China, responding institutions reported very large growth in enrollments from Iraq (55% increase) and Saudi Arabia (25%). International enrollments from Brazil and Vietnam also grew by 17% and 14%, respectively.

In addition to the 72% reporting increases, 26% reported declines, and 2% (5 institutions) reported that their overall international student enrollments stayed about the same as last year. Looking at new enrollments (students enrolled at a U.S. campus for the first time in fall 2013), 57% of responding institutions reported an increase. These fall 2013 snapshot survey findings, while not comprehensive, suggest that the numbers of new international students and total international students are likely to continue to grow at a stronger rate of increase than in the prior academic year.

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<sup>1</sup> This fall survey collects data separately from the annual *Open Doors* Report on International Educational Exchange produced by the Institute of International Education in partnership with the U.S. Department of State. *Open Doors* provides comprehensive statistics and analysis based on detailed data collected throughout the previous year from more than 3,000 U.S. campuses; the international student figures reported in *Open Doors* 2013 are for academic year 2012/13.

## What is driving the growth in enrollments on U.S. campuses?

Institutions were asked about institutional factors that are driving growth, as well as economic and other factors (Table 1). Among institutions reporting a growth in new international students, the major reasons for the reported increases appear to be largely related to continued active recruitment efforts (68%), the growing reputation and visibility of U.S. campuses abroad (61%), the growth of the middle class in rapidly developing economies (43%), and an increased number of linkages with institutions in other countries (31%). Additionally, a large number of campuses also noted the availability of scholarships by foreign governments and other types of sponsors as a reason for increased enrollments.

Table 1: Factors driving increases in international student enrollment, 2013/14	Percent
<b><u>Institutional changes:</u></b>	
Increased recruitment	67.9%
Growing reputation abroad	61.3%
Increased linkages	30.7%
New academic programming such as ESL	16.4%
Increased joint/dual degree programs	15.0%
More international high school students in pre-college summer programs	4.4%
<b><u>Economic and other factors:</u></b>	
Growth of middle class overseas	43.07%
Competition for top institutions at home	20.80%
Lowered concerns about visa availability	18.98%
Weak dollar made U.S. tuition costs more attractive	13.14%
Grad school more attractive due to fewer jobs	8.76%
Restrictive visa policies in other countries	5.84%

But not all institutions saw their international enrollments increase. For institutions that reported a decline in fall 2013, most cited the high cost of a U.S. higher education (44%), concerns over the visa process and potential delays or denials (32%), and home country economic problems (16%) (Table 2).

Table 2: Major reasons for decline in international students, 2013/14	% responding (N=100)
Cost of tuition/fees at U.S. institution	44.0%
Visa process and concerns over delays/denials	32.0%
Home country economic problems	16.0%
Students' decisions to study at home	14.0%
Students' decisions to study in a country other than U.S.	12.0%
Concerns about employment in U.S. after studies	9.0%
Concern over SEVIS fee payments	2.0%
Concerns about potential problems at the port-of-entry	1.0%

Over 70% of responding campuses had launched new efforts in the past year to maintain or increase their international enrollments. Among these institutions, the steps taken most frequently included: adding new staff or devoting additional staff time to international recruitment (63%), new international programs or collaborations (53%), new funding for international recruitment trips (44%), and engaging third-party recruiters/agents (30%) (Table 3). Additionally, campuses also reported the extensive use of social media, and more purposeful and targeted data-driven marketing efforts.

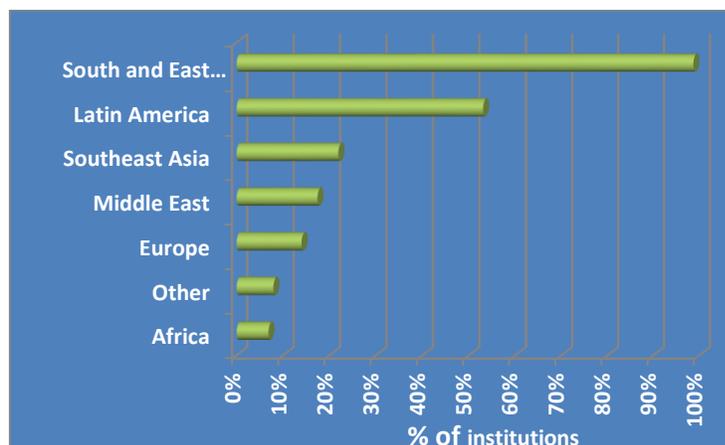
The institutions that did not take special steps mainly cited a lack of funding or resources, or reported that their international student enrollment is stable and growing and they are continuing with their existing recruitment strategies.

**Table 3: Institutions' reasons for taking or not taking steps to increase enrollments**

Reasons for taking steps to increase enrollments (N=280)	Percent
Additional staffing for international enrollments	62.5%
New international programs or collaborations abroad	52.5%
New funding for marketing and promotion of academic programs	27.1%
New funding for international recruitment trips	44.3%
Engaging third-party recruiters/agents	30.0%
Reasons for NOT taking steps to increase enrollment (N=88)	Percent
Lack of funding or resources	48.9%
International student enrollment is stable or growing	45.5%
We have continued existing policies for international student recruitment	38.6%
Lack of institutional commitment to international education	22.7%
Other aspects of international education are considered higher priority on our campus	10.2%
Other	8.0%

Almost all institutions (99%) that devoted more resources for international student recruitment trips have focused these efforts on East and South Asia (primarily China and India). But 53% of reporting institutions are also recruiting in Latin America (especially in Brazil), Southeast Asia (22%) and the Middle East (17%). The region that institutions were least likely to recruit in was Africa (7%).

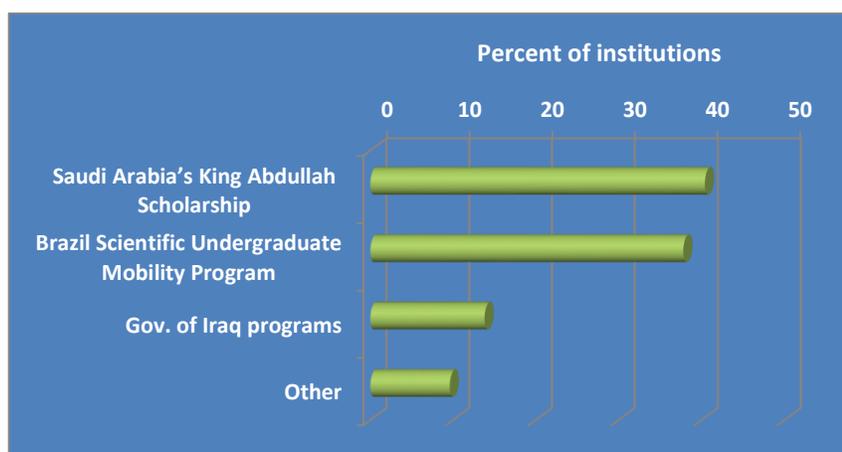
**Figure 1: Percent of institutions recruiting in different world regions, 2013/14**



## The role of national scholarship programs and other large-scale initiatives

Given the emergence of scholarship programs sponsored by foreign governments, survey respondents were asked about their institution's participation in these types of initiatives. A large proportion (40%) reported hosting students on the Saudi Arabia King Abdullah Scholarship Program (KASP) which has grown steadily since its inception in 2005. Another 38% reported participating in the Brazil Scientific Undergraduate Mobility Program (which has sent over 3,500 undergraduate students to the U.S. since the program began a year ago), and 14% were participating in scholarship programs supported by the Government of Iraq.

**Figure 2: Percent of institutions participating in foreign government scholarship programs, 2013/14**



Responding to a question about other scholarship programs, institutions most frequently mentioned those sponsored by Kuwait and Oman, but they also indicated that they have hosted students from other countries—including Vietnam, Botswana, Pakistan and Ecuador—that are also launching scholarship programs to send their students abroad.

This year the survey also asked respondents about their involvement in the 100,000 Strong in the Americas, a U.S. government initiative designed to increase educational exchange across the Western Hemisphere. Eighteen percent of the responding institutions said they have conducted planning and recruitment trips within Latin America, 16% have engaged in partnership activities with institutions in the region, and 11% have hosted more international students from the region than in prior years. Some other steps taken by campuses include establishing centers focused on Latin American studies, and hiring staff to develop a strategic initiative for the Western Hemisphere.

## Additional support for international students

With the increasing presence of Chinese students on U.S. campuses, many respondents reported providing a range of programs and services designed to better integrate the growing number of Chinese students on their campuses and in their communities, and to ensuring English proficiency levels. These efforts ranged from adding more ESL classes, increasing their level of student support services, and assisting Chinese students with academic, social and cultural issues. Many campuses have also begun to provide special training for faculty and staff and have also involved on-campus Chinese faculty as mentors. Despite these efforts, many respondents noted that they continue to struggle with providing adequate English language training to Chinese students, and with trying to diversify their international student body.

Regarding international students who were affected by the political turmoil in Syria and Egypt, one quarter (25%) of the responding institutions reported providing added support to students from these two countries (as well as Libya). Many institutions indicated that they provided direct financial assistance, such as scholarships, tuition waivers or discounts, made short-term loans, provided free or reduced-rate housing and meal tickets, expanded personal and group counseling services, shared information with students about IIE emergency grant programs and/or participated in the IIE-led Syria consortium. Some institutions also reported making application deadlines flexible for students from these countries and relaxing their requirements of receiving transcripts directly from the home institution/school.

## **Conclusion**

The majority of U.S. institutions are experiencing strong growth in international enrollments for the current academic year that began in fall 2013. Much of this growth has come from Asia and the Middle East, driven both by individual students' decisions to study in the U.S., but also due to the advent of large-scale scholarship programs initiated by many foreign governments including those of Brazil, Saudi Arabia, Iraq and other countries. U.S. institutions continue to invest in expanding their recruitment strategies to attract more international students and in additional staffing and services to enable them to serve a growing international student population on their campus.

## **About the survey:**

A total of 380 institutions responded to the survey, reflecting the full range of U.S. higher education. Among the respondents were 96 U.S. campuses that enroll more than 1,000 international students each. The composition of the respondent pool was as follows: Doctoral/Research institutions (33%), Master's institutions (32%), Baccalaureate colleges (17%), two-year colleges (13%), and Professional/Specialized institutions (5%). The survey was carried out by the Institute of International Education (IIE) in cooperation with American Association of Community Colleges (AACC), American Association of Collegiate Registrars and Admissions Officers (AACRAO), American Association of State Colleges and Universities (AASCU), American Council on Education (ACE), Association of American Universities (AAU), Association of Public and Land-grant Universities (APLU), Council of Graduate Schools (CGS), and NAFSA: Association of International Educators.