

FALL 2007 INTERNATIONAL STUDENT ENROLLMENT SURVEY

November 2007

The survey, which reports on enrollment trends for international students at U.S. colleges and universities, was conducted among members of the following higher education associations:

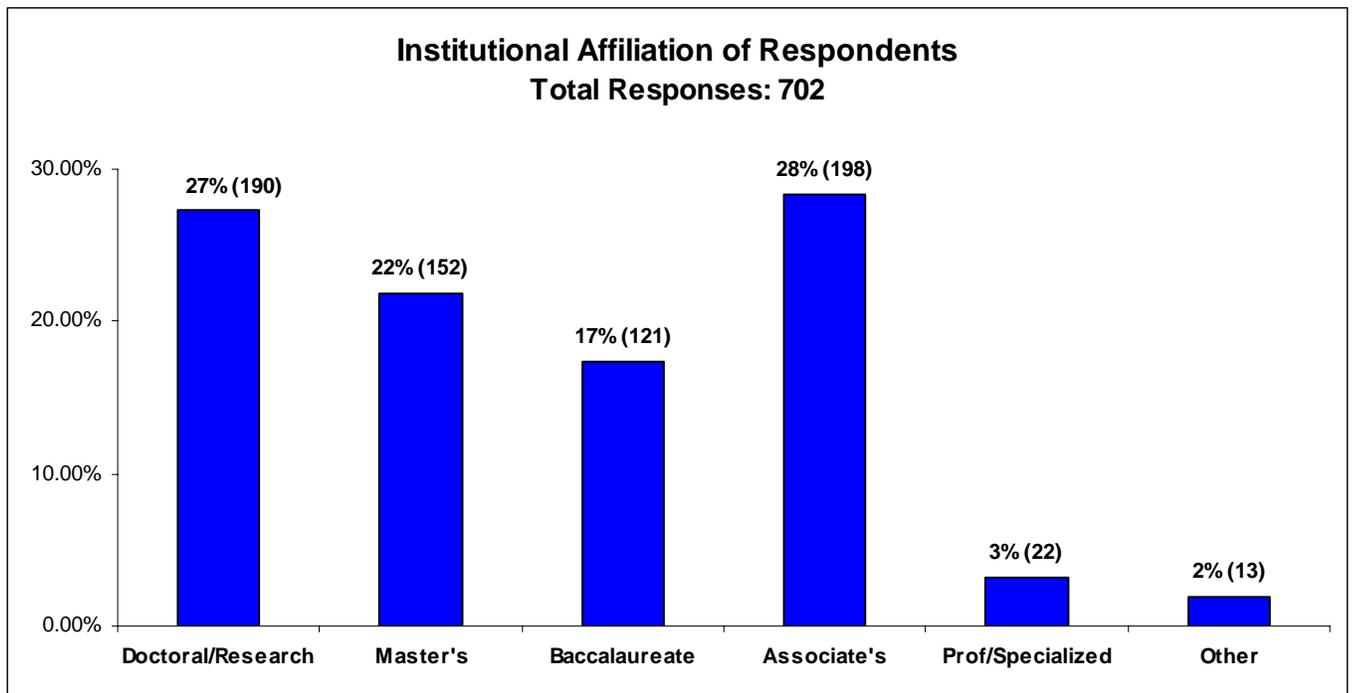
- American Association of Community Colleges (AACCC)
- American Association of State Colleges and Universities (AASCU)
- American Council on Education (ACE)
- Association of American Universities (AAU)
- Council of Graduate Schools (CGS)
- Institute of International Education (IIE)
- NAFSA: Association of International Educators
- National Association of State Universities and Land-Grant Colleges (NASULGC)

The survey was conducted between October 1 and 23, 2007.

RESPONDENTS

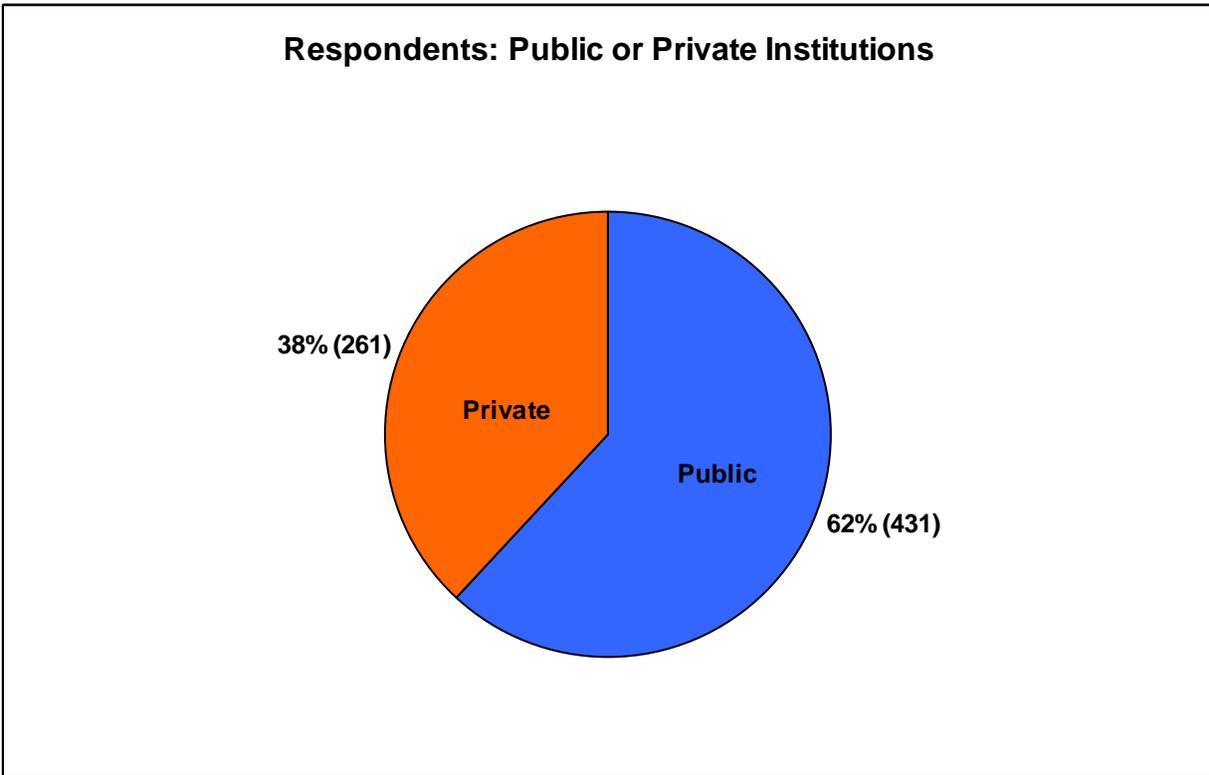
- The survey received responses from 702 U.S. higher education institutions from all institutional types. Twenty-eight percent (198) of the respondents were associate institutions, 27% (190) were doctoral/research institutions, 22% were Master’s institutions, 17% were Baccalaureate institutions, 3% were Specialized institutions, and 2 % represented other types of institutions.
- Sixty-two percent (431) were public institutions and 38% (261) were private institutions.

Figure 1: Respondents. Total Responses 702¹



¹ Respondents include member institutions from the eight higher education associations that participated in this joint survey. The eight organizations sent the survey to their respective memberships, which cover nearly all accredited higher education institutions in the United States. Because in many cases, membership overlaps, we cannot provide a specific response rate to the survey, but care was taken to ensure that only one survey response from a particular institution was included in this analysis.

Figure 1b: Type of Institution: Public or Private



NEW INTERNATIONAL STUDENT ENROLLMENTS

Figure 2a-2f: Newly Enrolled International Students

Focusing only on newly enrolled international students, how has that number at your institution changed this year (Fall 2007) compared to Fall 2006?

- Of all responding institutions, 55% (or 379 respondents) reported an increase, 19% (134) reported a decline, and 26% (179) reported level enrollments. Last year, 52% reported an increase, 20% a decline, and 28% level enrollments.
- Of the responding institutions that enroll more than 1,000 international students (92 institutions that responded to this question), 79% (73 responding institutions) reported increases, 9% (8 institutions) reported declines, and 12% (11 institutions) reported level enrollments. Last year, 73% reported increases, 8% reported declines, and 19% reported level enrollments.
- Of the responding two-year colleges, 47% (93 responding institutions) reported increases, 18% (35 institutions) reported declines, and 35% (68 institutions) reported level enrollments. Last year, 52% reported increases, 19% reported declines, and 29% reported level enrollments.
- Of the responding Research/Doctoral institutions, 67% (127 responding institutions) reported increases, 25% (24 institutions) reported declines, and 20% (38 institutions) reported level enrollments. Last year, 65% (139 responding institutions) reported increases, 13% (27 institutions) reported declines, and 23% (49 institutions) reported level enrollments.
- Of the responding Baccalaureate institutions, 45% (55 responding institutions) reported increases, 26% (30 institutions) reported declines, and 30% (36 institutions) reported level enrollments. Last year, 45% reported increases, 26% reported declines, and 29% reported level enrollments.
- Of the responding Master's institutions, 59% (88 responding institutions) reported increases, 22% (33 institutions) reported declines, and 19% (29 institutions) reported level enrollments. Last year, 49% (108 responding institutions) reported increases, 26% (49 institutions) reported declines, and 28% (61 institutions) reported level enrollments.

Figure 2a: Newly enrolled international students, Fall 2007 compared to Fall 2006.

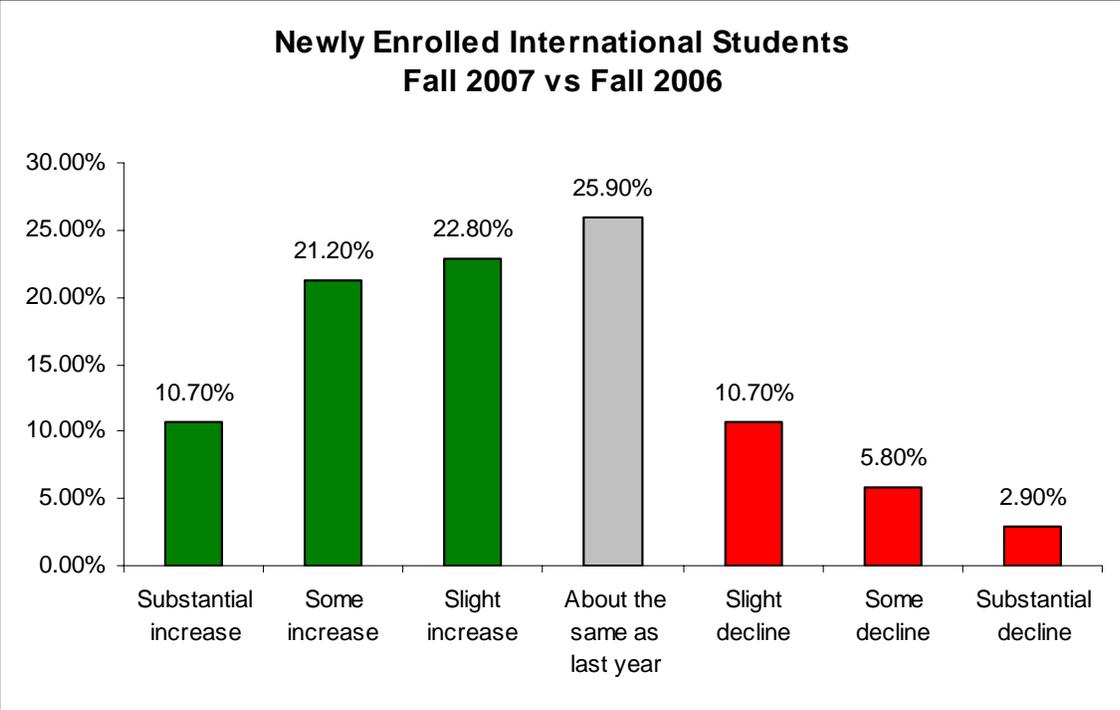


Figure 2b: Newly enrolled international students at institutions enrolling more than 1,000 international students, Fall 2007 compared to Fall 2006.

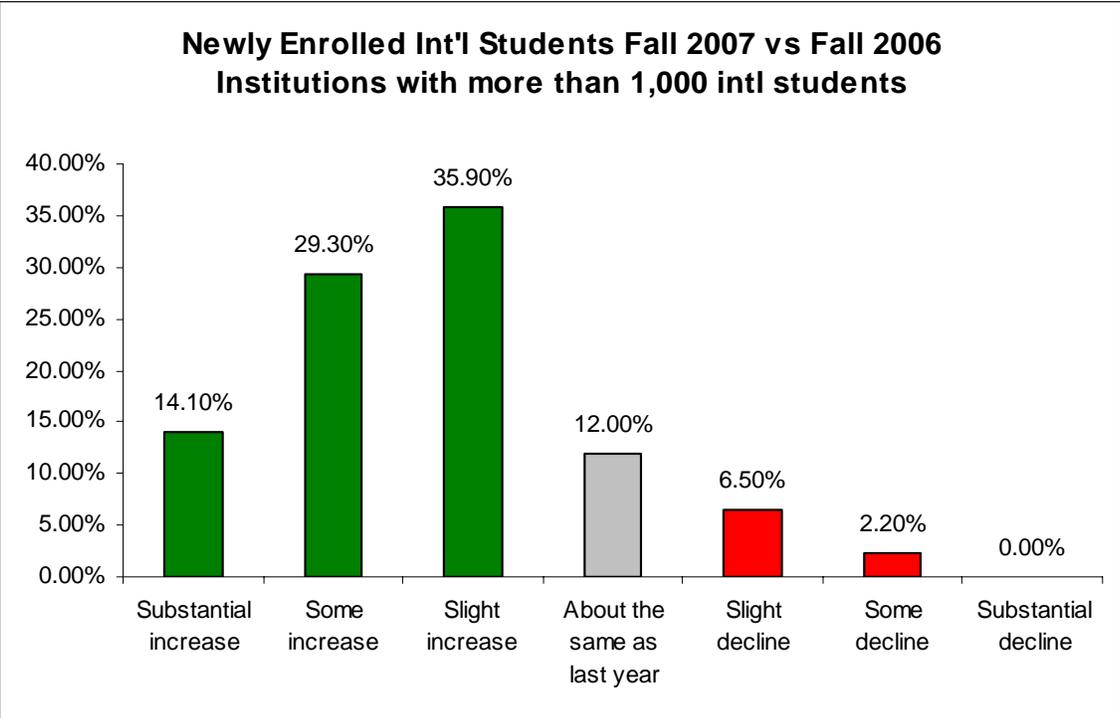


Figure 2c: Two-Year Colleges:

Newly enrolled international students at institutions at two-year colleges, Fall 2007 compared to Fall 2006.

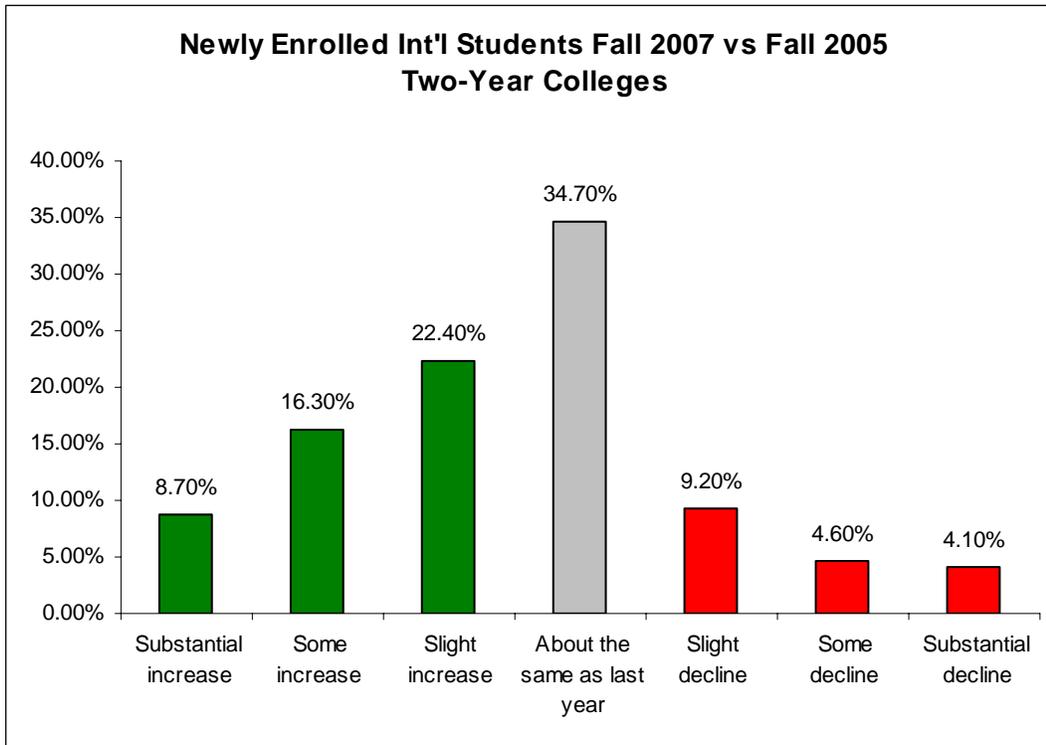


Figure 2d: Doctoral/Research Institutions:

Newly enrolled international students at institutions at Doctoral/Research institutions, Fall 2007 compared to Fall 2006.

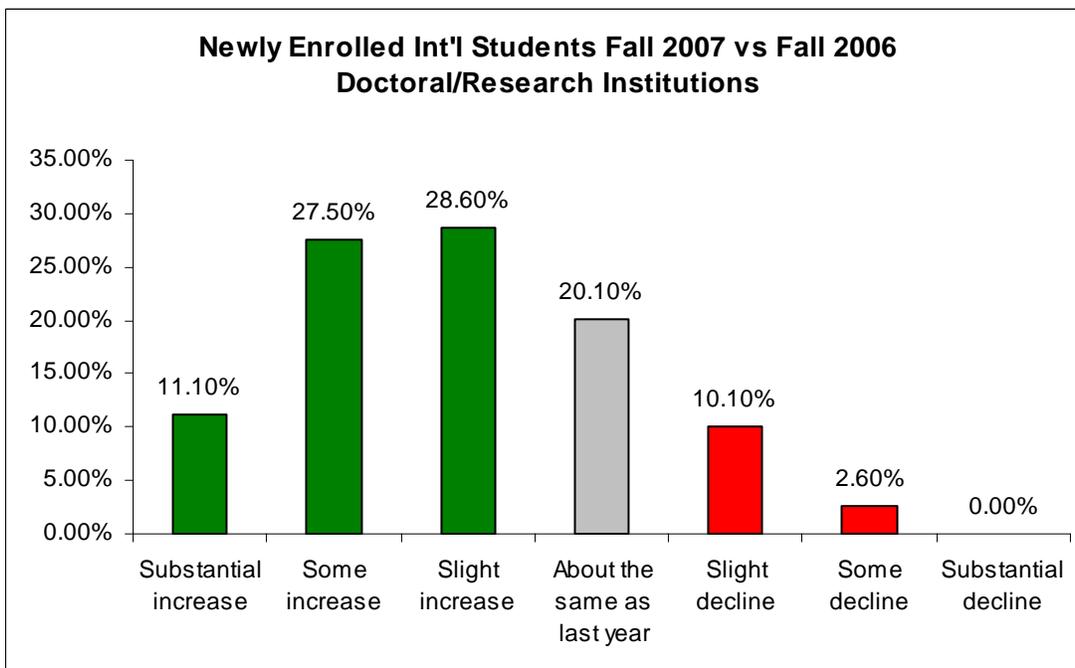


Figure 2e: Baccalaureate Institutions:
Newly enrolled international students at institutions at Baccalaureate Institutions, Fall 2007 compared to Fall 2006.

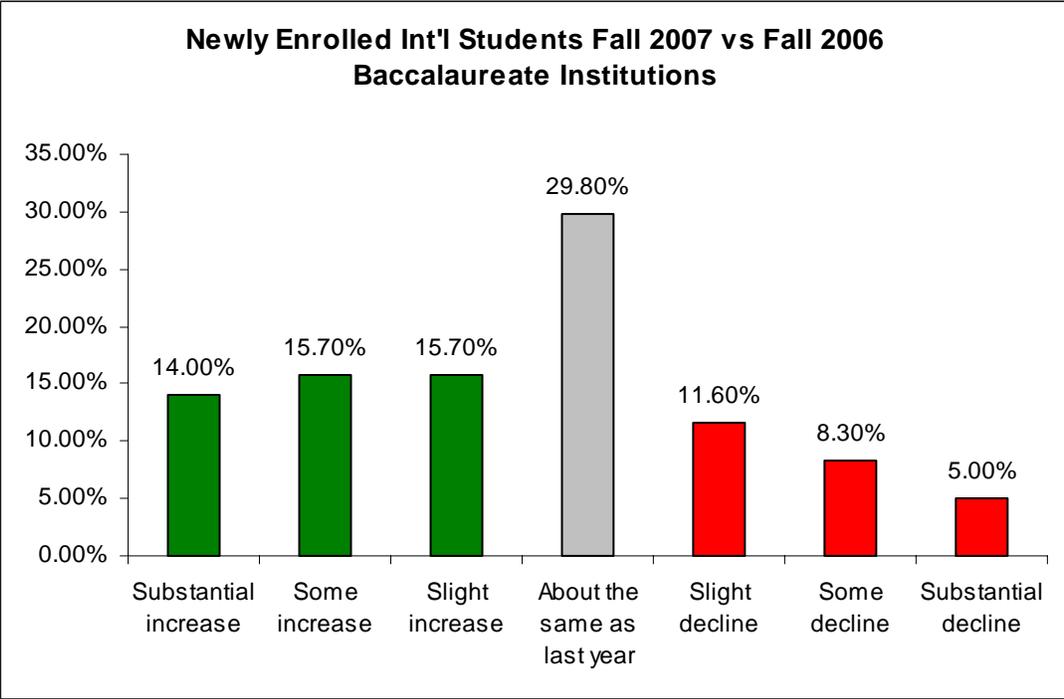
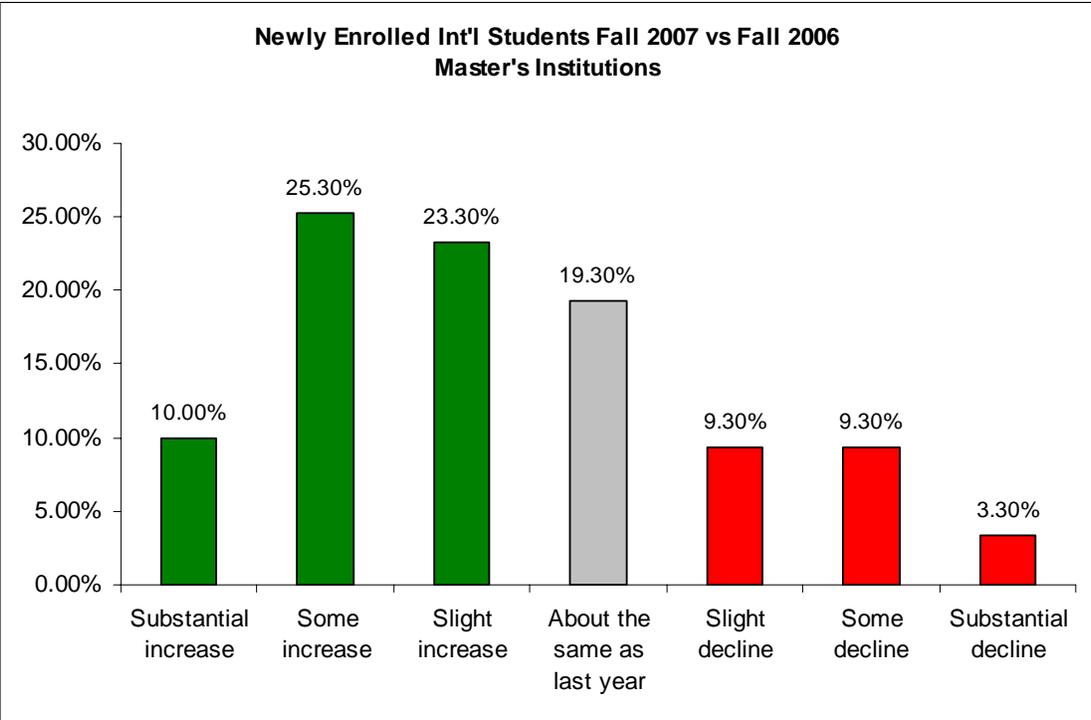


Figure 2f: Master's Institutions:
Newly enrolled international students at institutions at Master's Institutions, Fall 2007 compared to Fall 2006.



TOTAL INTERNATIONAL STUDENT ENROLLMENTS

Figure 3a-3f: Total International Student Enrollments

How has the total enrollment of international students at your institution changed this fall (Fall 2007), compared to Fall 2006?

- Of all responding institutions, 57% (396 respondents) reported an increase, 19% (130) reported a decline, and 24% (167) reported level enrollments. Last year, 45% reported an increase, 26% reported a decline, and 29% reported level enrollments.
- Of the responding institutions that enroll more than 1,000 international students (93 institutions), 82.8% (77 responding institutions) reported increases, 7.5% (7 institutions) reported declines, and 9.7% (9 institutions) reported level enrollments. Last year, 58% reported increases, 20% reported declines, and 22% reported level enrollments.
- Of the responding two-year colleges, 55% (108 responding institutions) reported increases, 17% (34 institutions) reported declines, and 28% (55 institutions) reported level enrollments. Last year, 45% reported increases, 26% reported declines, and 28% reported level enrollments.
- Of the responding Doctoral/Research institutions, 67% (126 institutions) reported increases, 12% (23 institutions) reported declines, and 21% (40 institutions) reported level enrollments. Last year, 54% reported increases, 21% reported declines, and 25% reported level enrollments.
- Of the responding Baccalaureate institutions, 43% (52 institutions) reported increases, 27% (33 institutions) reported declines, and 30% (36 institutions) reported level enrollments. Last year, 36% reported increases, 32% reported declines, and 32% reported level enrollments.
- Of the responding Master's institutions, 60% (89 institutions) reported increases, 22% (33 institutions) reported declines, and 18% (27 institutions) reported level enrollments. Last year, 44% (98 institutions) reported increases, 27% (60 institutions) reported declines, and 29% (63 institutions) reported level enrollments.

Figure 3a: Total International Student Enrollments, Fall 2007 compared to Fall 2006

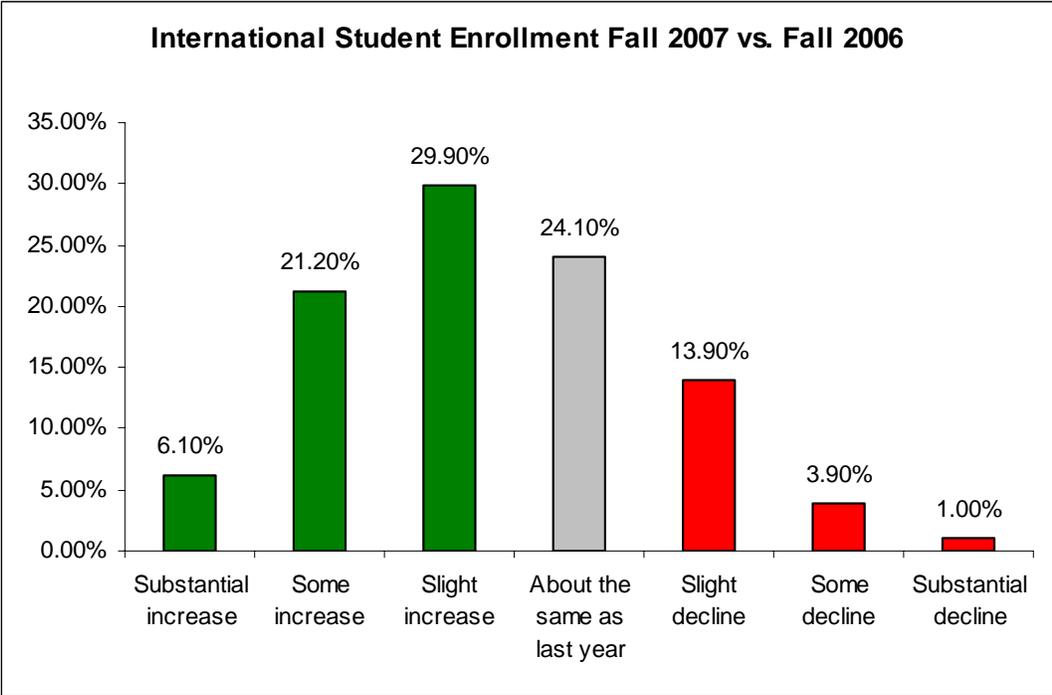


Figure 3b: Total international student enrollments at institutions with more than 1,000 international students, Fall 2007 vs. Fall 2006.

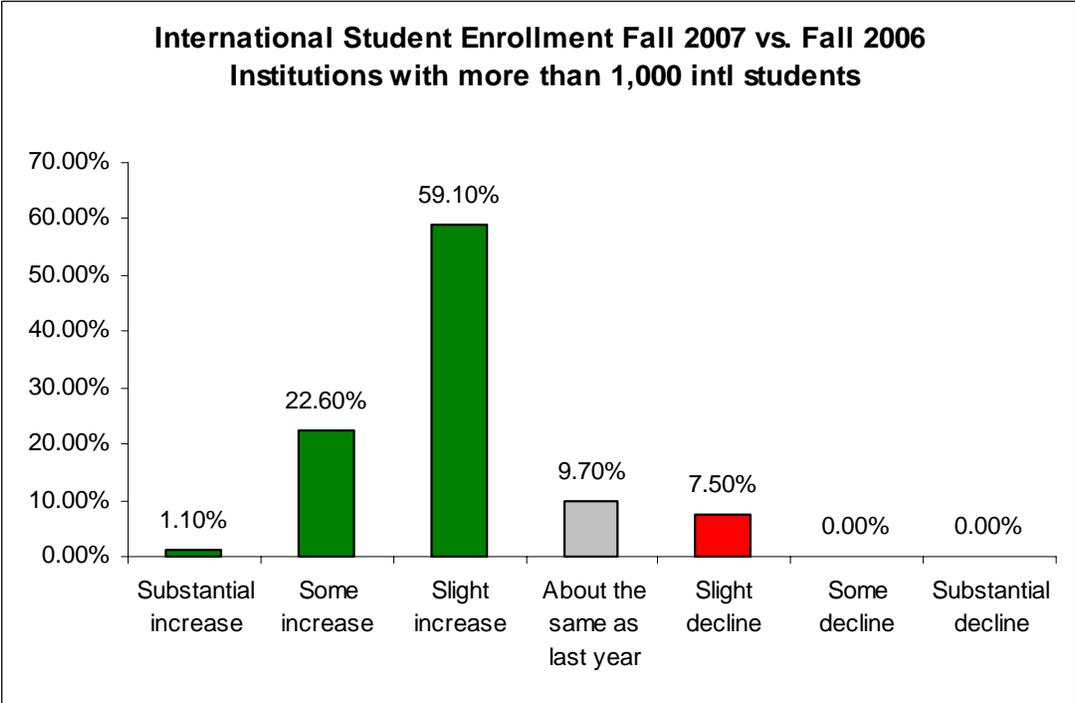


Figure 3c: Two-Year Colleges: Total international student enrollments at two-year colleges, Fall 2007 vs. Fall 2006

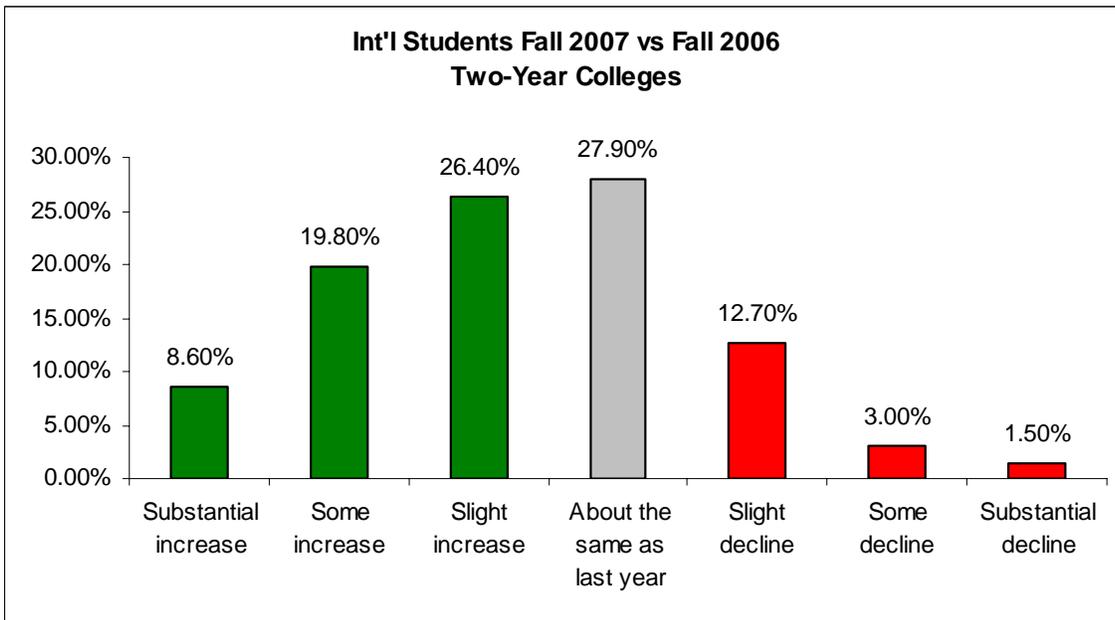


Figure 3d: Doctoral/Research Institutions: Total international student enrollments at responding institutions who indicated that they are a Doctoral/Research institution Fall 2007 vs. Fall 2006.

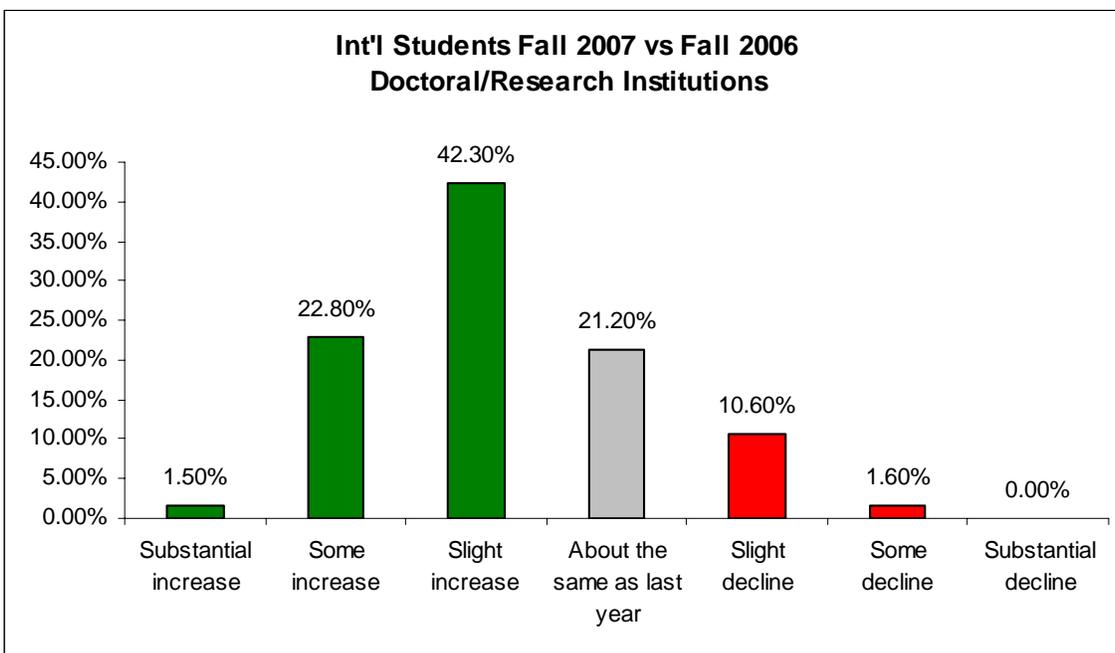


Figure 3e: Baccalaureate Institutions: Total international student enrollments at Baccalaureate institutions, Fall 2007 vs. Fall 2006

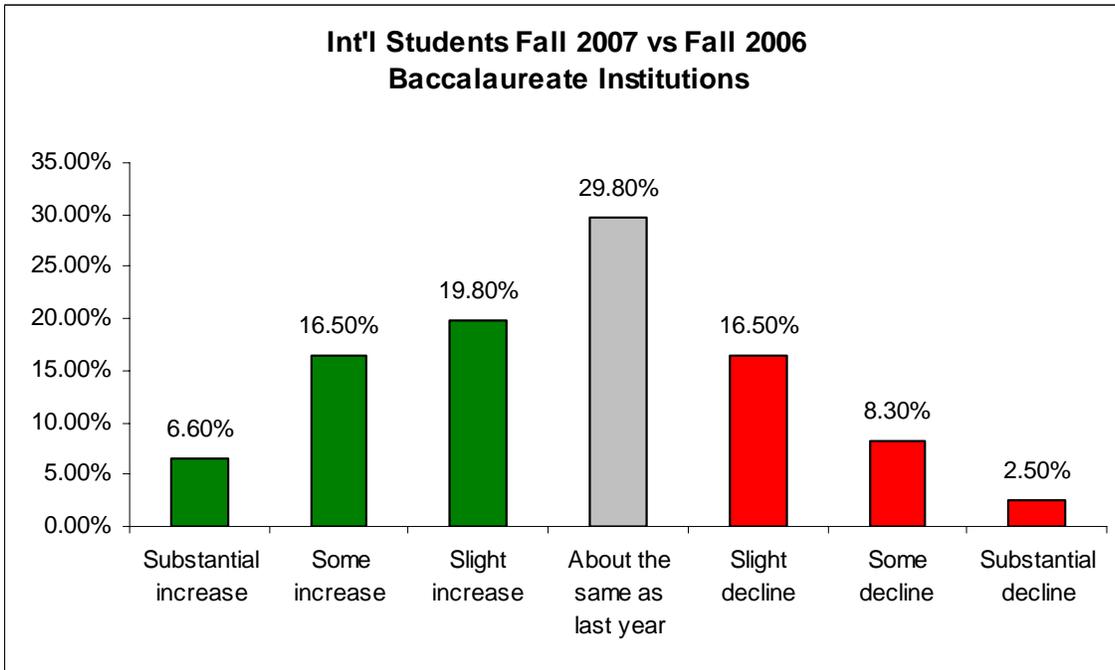
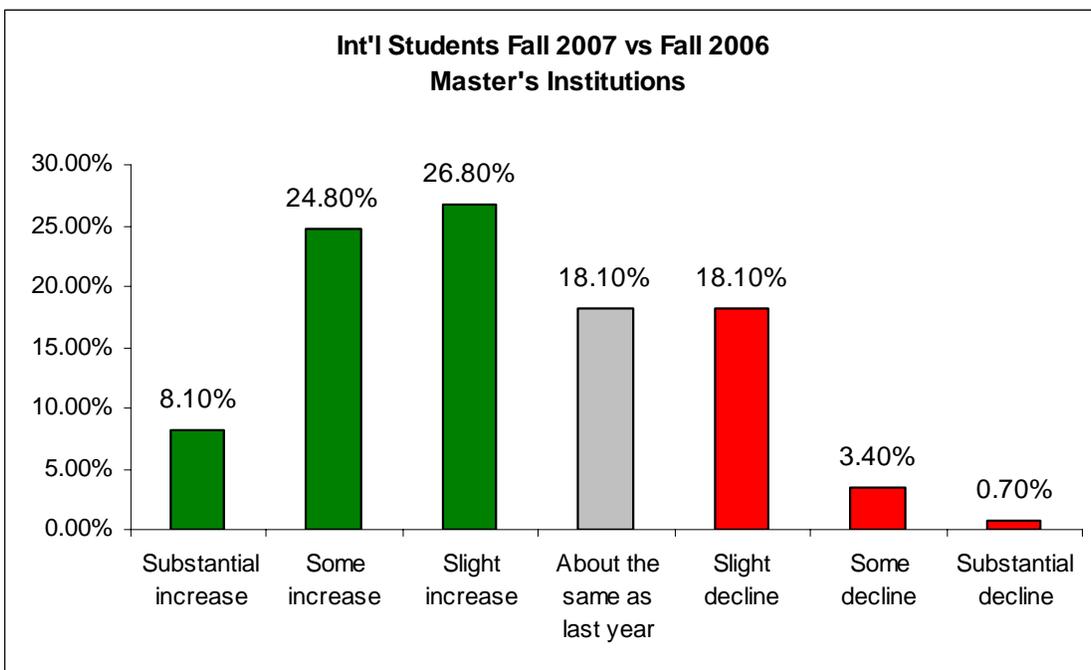


Figure 3f: Master's Institutions: Total international student enrollments at Master's institutions, Fall 2007 vs. Fall 2006

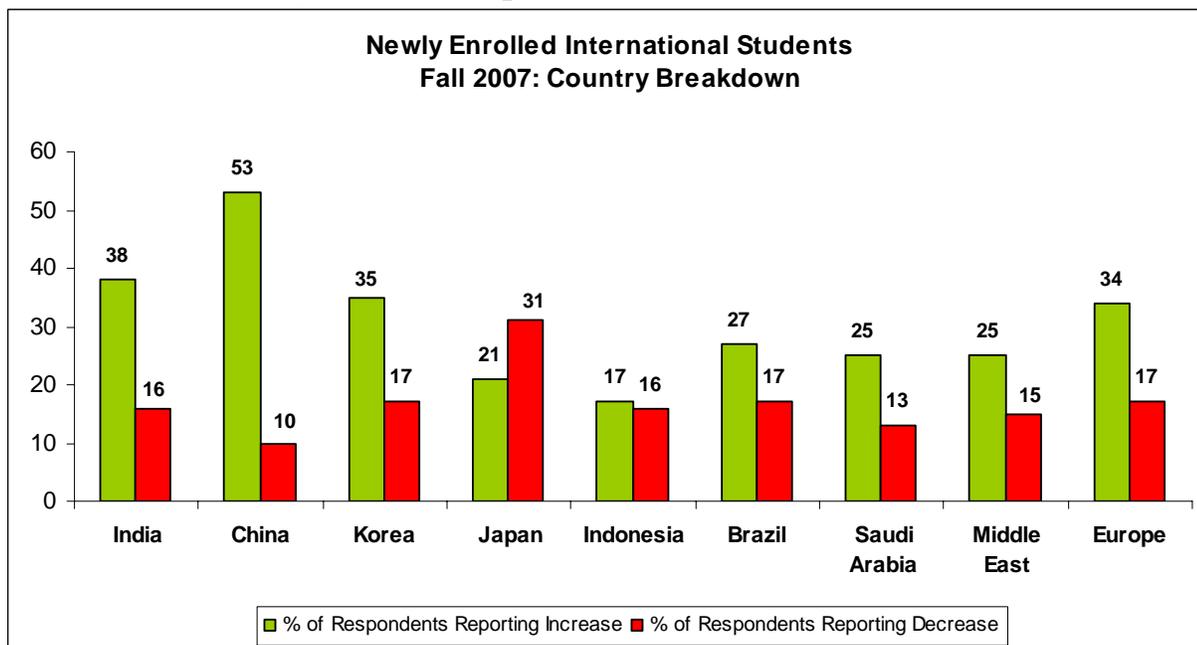


COUNTRY BREAKDOWN: **NEW INTERNATIONAL STUDENT ENROLLMENTS**

What change, if any, have you noticed for Fall 2007 compared to Fall 2006 in the number of newly enrolled international students from the following places of origin?

- For most countries, more responding institutions reported an increase than a decline²:
 - China (53% reporting increases vs. 10% reporting declines, and the rest reporting level enrollments)
 - Korea (35% reporting increases vs. 17% reporting declines)
 - India (38% reporting increases vs. 16% reporting declines)
 - Saudi Arabia (25% reporting increases vs. 13% reporting declines)
 - Brazil (25% reporting increases vs. 17% reporting declines)
- For Middle East as a region, 25% of respondents reported an increase and 15% reported a decline. Middle East was defined as: *Bahrain, Cyprus, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Palestinian Authority, Qatar, Syria, Turkey, United Arab Emirates, Yemen. Saudi Arabia was listed separately in light of their new major scholarships for study abroad.*
- For Europe as a region, 34% of respondents reported an increase and 17% reported a decline. For the purposes of this survey, Turkey and Cyprus were included in Europe.
- For Japan, more responding institutions reported a decline than an increase (31% reporting a decline vs. 21% reporting an increase)

Figure 4: Country Breakdown: Reported increases and declines in the number of newly enrolled international students, Fall 2007 compared to Fall 2006



² Increases and declines include “slight”, “some” and “substantial”. Responding campuses were not asked to provide actual numbers of students, therefore it is not possible to determine the exact degree of the declines or increases for each country. The remaining respondents indicated level enrollments.

SPECIAL STEPS TO ENSURE INTERNATIONAL ENROLLMENTS **DO NOT DECLINE**

Has your institution taken any special steps since last year (or within the past year) to ensure that the number of international enrollments does not decline?

- Sixty percent (417) of all responding institutions have taken special steps to ensure that the number of international students on their campuses does not decline, while 40% (274) have not taken any special steps.
- Special steps included new international programs or collaborations (cited by 33%), followed by new staff or additional staff time devoted to international recruitment (26%), new funding for international recruitment trips (23%), and new funding for marketing and promotion of programs (21%).
- Institutions that have devoted more resources for international student recruitment trips seem to have concentrated mainly on Asia. Twenty-five percent of responding institutions specifically devoted resources to recruit international students from China, followed by Korea (16%) and India (15%). An additional 18% report having focused more resources on 'other countries in Asia'. Institutions also devoted more resources to recruitment trips to Latin America (14%), the Middle East (11%), Europe (11%), and Africa (3%).
- Those institutions who responded that they have not taken special steps to ensure that the number of international students does not decline have indicated various reasons in written responses, including lack of funding or resources, lack of institutional commitment to international education, lack of need for special steps (enrollments are stable or growing), or continuation of new policies started earlier.

Several comments from survey respondents are included below:

Increasing international enrollments is not a strategic priority at this time.

Apparently not a priority with regards to making funds available.

Campus administration feels that its too difficult to enroll international students; therefore, resources are not allocated towards efforts to enroll them.

No additional staff to handle student visa procedures

In the past we had very high discounts for int'l students. Financially, we are not able to offer that anymore. The discounts are lower.

The college prefers to spend money on marketing and scholarships for local high school graduates and the local minority community.

Our institutional goal is to sustain or slightly reduce the total number of enrolled international students and become more selective in our acceptance practices.

Don't need to when the institution is among the top rated in the world.

Enrollment is stable and resources are limited.

Our students are fully funded and application far exceed available "slots".

Figure 5a: Special Steps

Has your institution taken any special steps to ensure that the number of international enrollments does not decline?

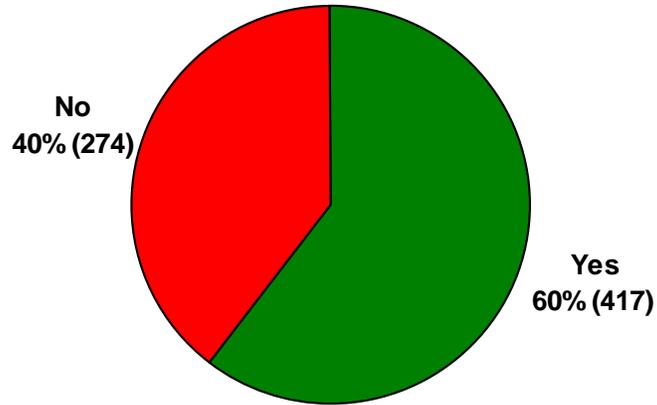


Figure 5b: Which steps were taken?

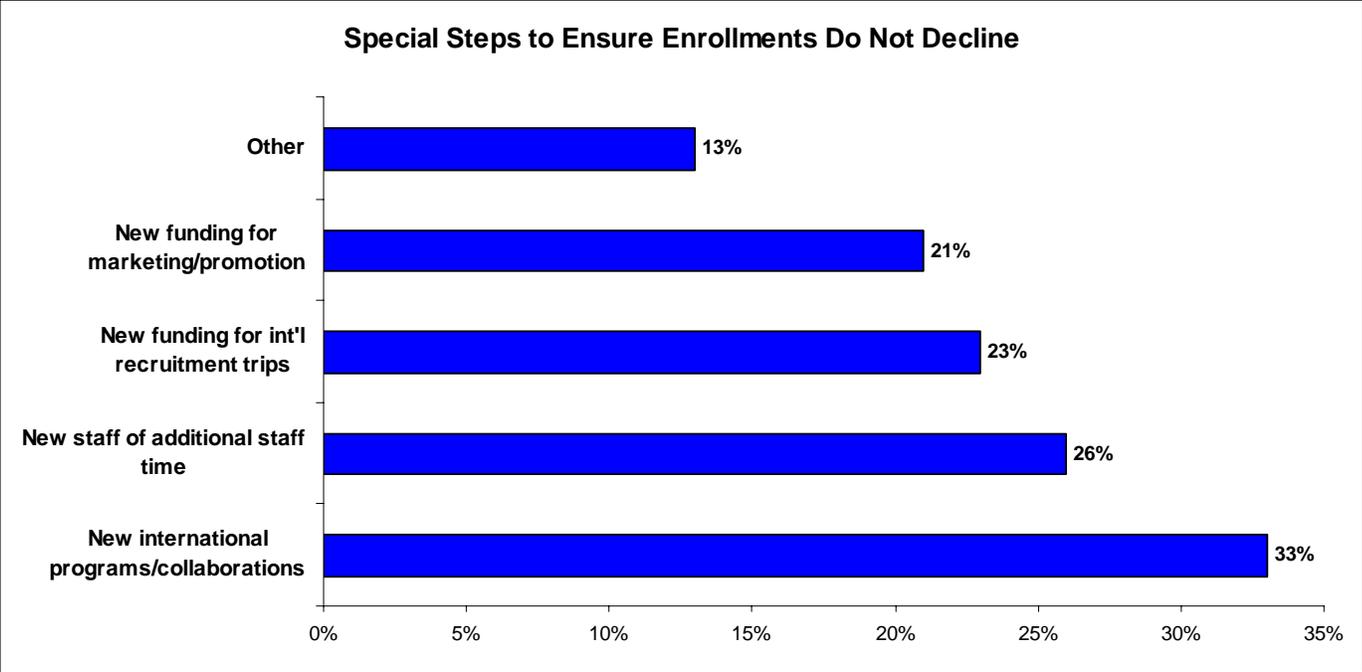
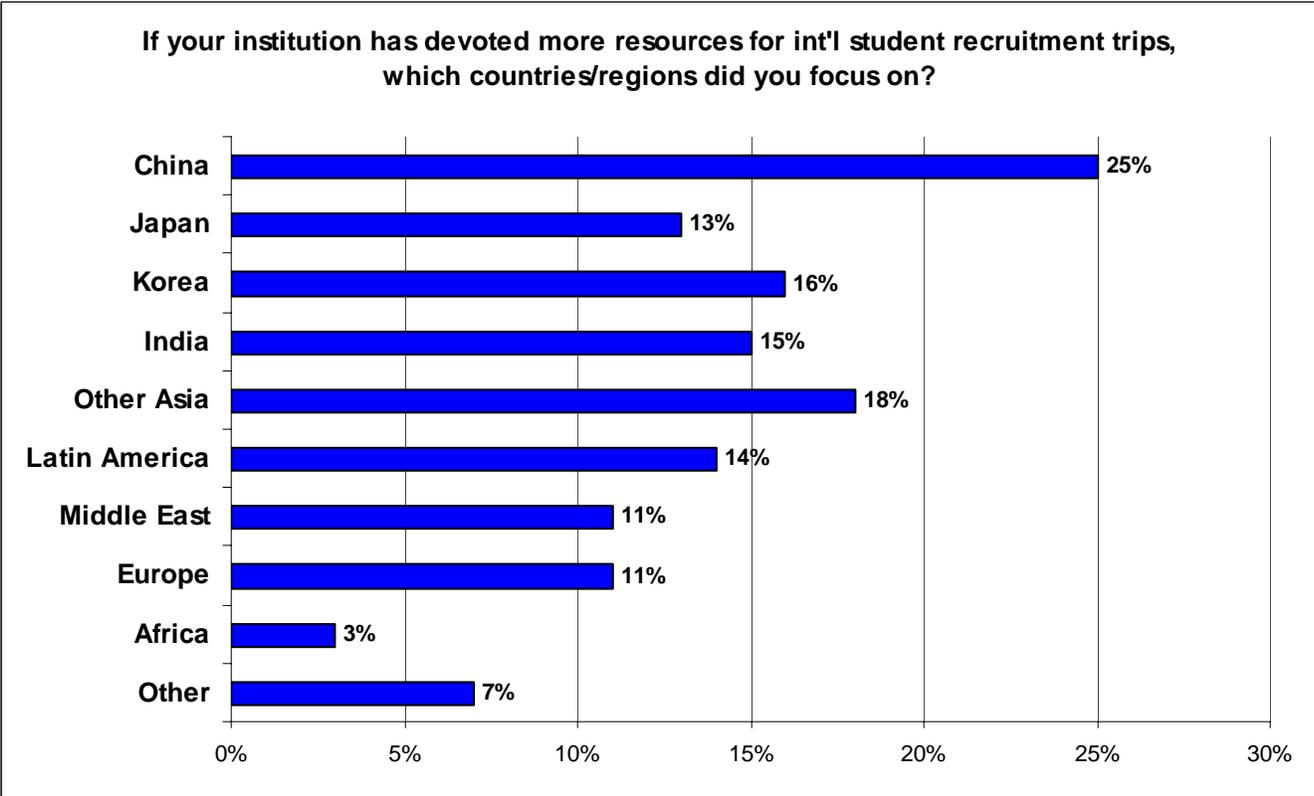


Figure 5c: If your institution has devoted more resources for international student recruitment trips, which countries/regions did you focus on?

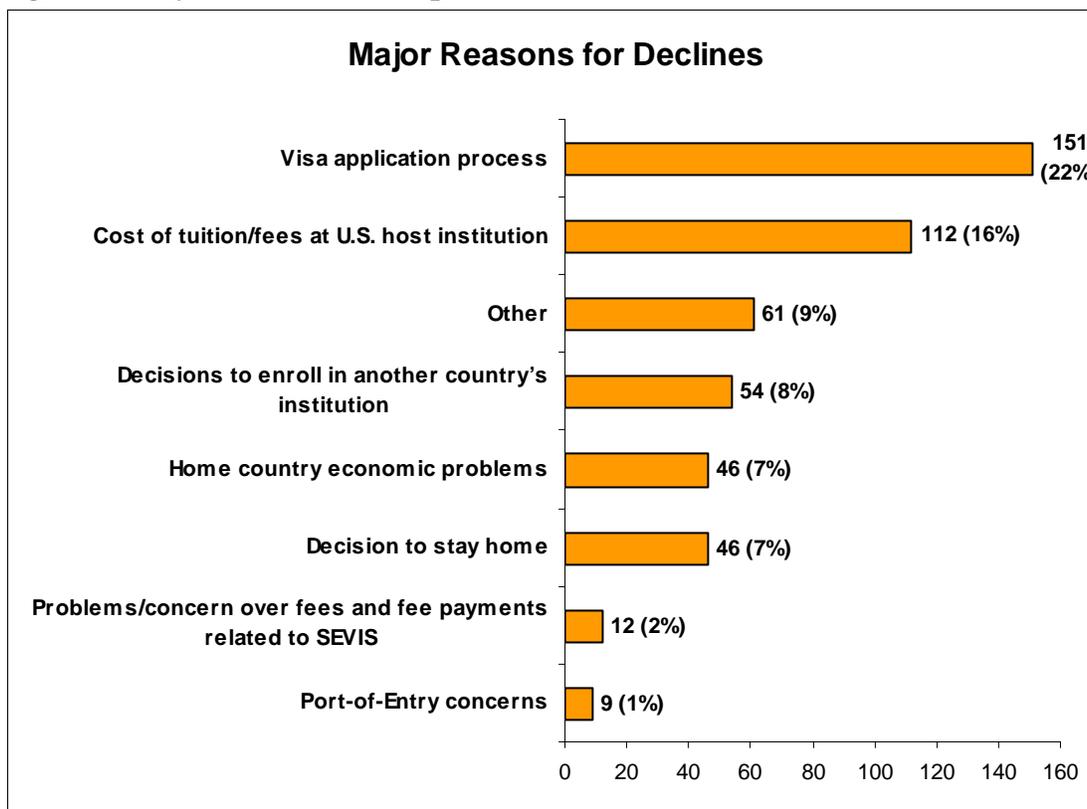


MAJOR REASONS FOR REPORTED DECLINES IN ENROLLMENTS

Based on feedback from international applicants, what do you believe are the major reasons for the decline in enrollments?

- Twenty-two percent (151 institutions) of the responding institutions experiencing declines in international student enrollments cited visa application processes and concerns over delays/denials as the major reason for the decline, followed by cost of tuition/fees at U.S. institutions (16%) and decisions to enroll in another country's institutions (8%).
- Of the 97 respondents (or 11%) who chose "other" as their response, many indicated increased competition for international students from other U.S. institutions, lack of financial aid or scholarships for international students, potential students' negative perceptions of the visa and entry process, or a combination of all the various reason listed.

Figure 6: Major Reasons for Reported Declines in Enrollments

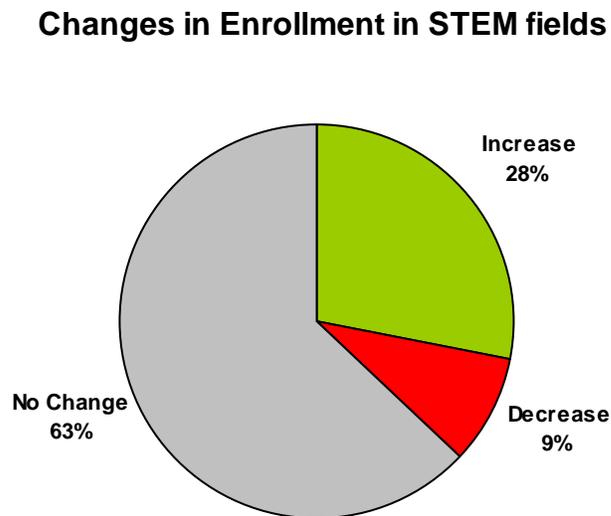


FIELDS OF STUDY

Given recent concerns regarding international student enrollments in STEM fields (Science, Technology, Engineering, and Mathematics), what shift, if any, have you seen in the number of newly enrolled international students this year (Fall 2007) compared to Fall 2006.

- 28% of respondents reported an increase in international student enrollments in STEM fields (Science, Technology, Engineering, and Mathematics), 9% reported a decline, and 63% saw no change.

Figure 7: Enrollment changes in STEM fields

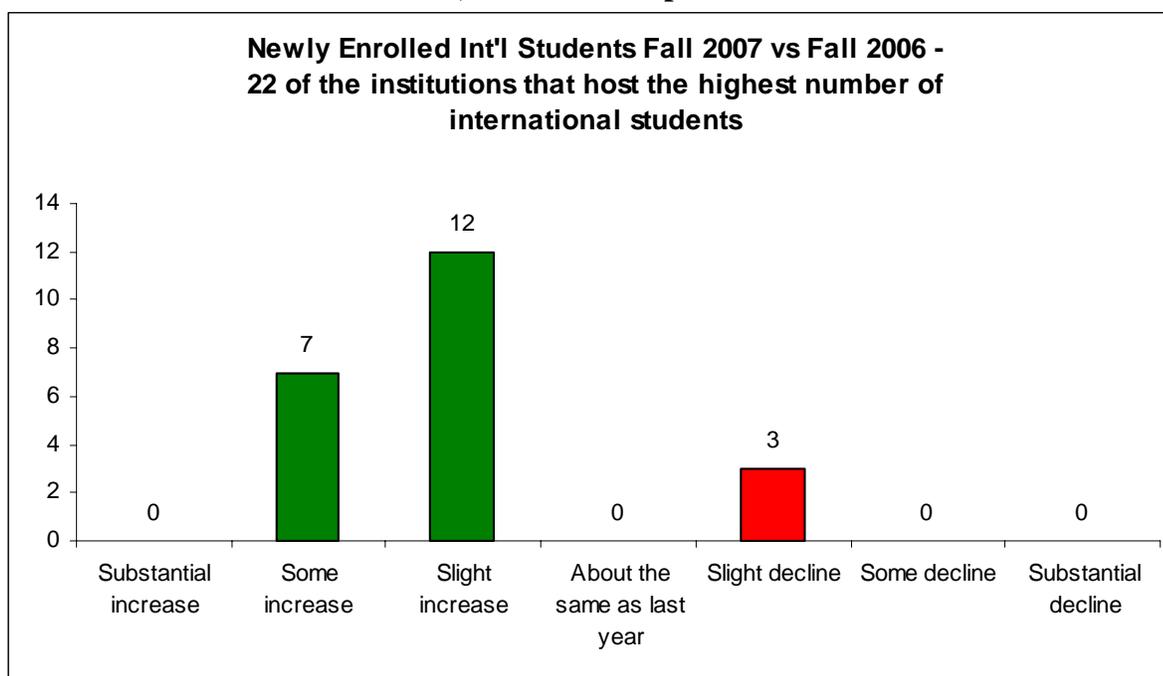


RESPONSES FROM THE TOP 25 HOST INSTITUTIONS THAT ENROLL THE HIGHEST NUMBER OF INTERNATIONAL STUDENTS

Twenty-two of the Top 25 host institutions³ responded to this survey.

- Nineteen institutions (86%) that host the highest numbers of international students report increases in the number of newly enrolled international students on their campuses this year, while only 3 institutions (14%) reported declines.
- Looking at overall international student enrollments, again 19 of the 22 institutions reported an increase, while two reported a decline, and one reported no change.

Figure 8a: Newly enrolled international students at 22 institutions that enroll the highest numbers of international students, Fall 2007 compared to Fall 2006.



³ The top 25 host institutions (according to *Open Doors 2006 Report on International Educational Exchange*) refer to the 25 institutions nationally that host the largest numbers of international students on their campuses.

Figure 8b: Overall international student enrollments at 22 institutions that enroll the highest numbers of international students, Fall 2007 compared to Fall 2006.

