

FALL 2009 INTERNATIONAL STUDENT ENROLLMENT SURVEY

November 2009

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:

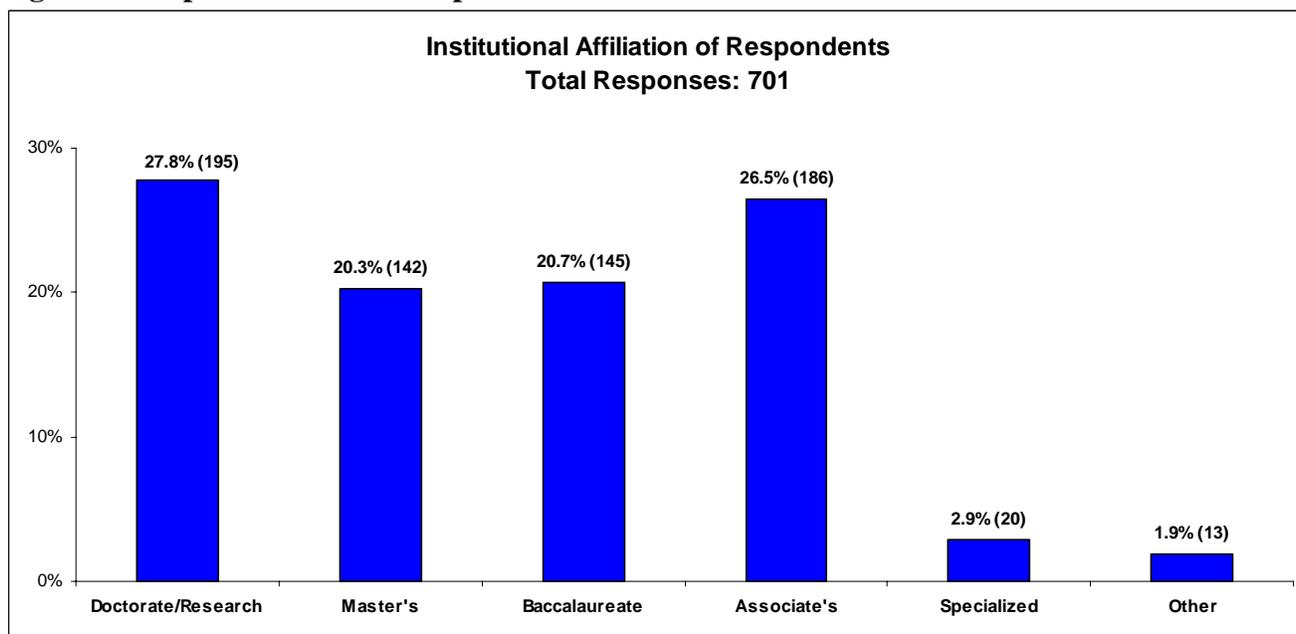
- American Association of Community Colleges (AACCC)
- American Association of State Colleges and Universities (AASCU)
- American Council on Education (ACE)
- Association of American Universities (AAU)
- Association of Public and Land-grant Universities (APLU)
- Council of Graduate Schools (CGS)
- Institute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

The survey was conducted between October 5 and 26, 2009.

RESPONDENTS

- The survey received responses from 701 U.S. higher education institutions from all institutional types. Doctoral/research institutions represented the largest group of respondents, with 27.5% (195 respondents), followed by associate's institutions with 26.2% (186). Baccalaureate institutions represented 20.7% (145) of respondents, followed by Master's institutions with 20.3% (142), Specialized institutions with 2.9% (20), and other types of institutions with 1.9% (13).
- Sixty-two percent (434) were public institutions and 38% (265) were private institutions.
- The survey received responses from 121 institutions that enroll more than 1,000 international students.
- Nineteen of the top 20 host institutions responded.¹

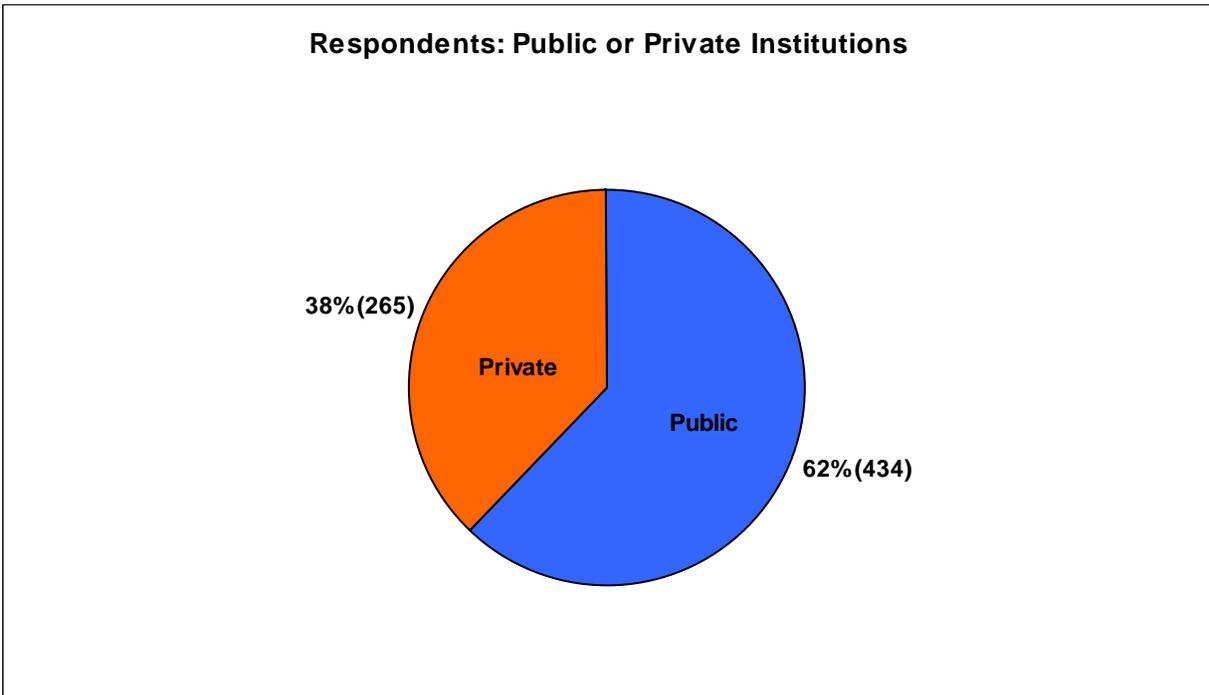
Figure 1: Respondents. Total Responses 701²



¹ The top 20 host institutions (according to *Open Doors 2008 Report on International Educational Exchange*) refer to the 20 institutions nationally that host the largest numbers of international students on their campuses.

² 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

Figures 2a-2f: Changes in Newly Enrolled International Students

Focusing only on newly enrolled international students, how has that number at your institution changed this year (Fall 2009) compared to Fall 2008?

- Of all responding institutions, 45% (or 312 respondents) reported an increase, 29% (204) reported a decline, and 26% (185) reported level enrollments. Last year, 56% reported an increase, 19% a decline, and 25% level enrollments.
- Of the responding institutions that enroll more than 1,000 international students (120 institutions that responded to this question), 62% (74 responding institutions) reported increases, 20% (24 institutions) reported declines, and 18% (22 institutions) reported level enrollments. Last year, 78% reported increases, 8% reported declines, and 14% reported level enrollments.
- Of the responding two-year colleges, 36% (67 responding institutions) reported increases, 31% (57 institutions) reported declines, and 33% (61 institutions) reported level enrollments. Last year, 50.5% reported increases, 20.6% reported declines, and 28.9% reported level enrollments.
- Of the responding Research/Doctoral institutions, 57% (112 responding institutions) reported increases, 23% (45 institutions) reported declines, and 20% (38 institutions) reported level enrollments. Last year, 67% reported increases, 13% reported declines, and 20% reported level enrollments.
- Of the responding Baccalaureate institutions, 43% (62 responding institutions) reported increases, 31% (45 institutions) reported declines, and 26% (37 institutions) reported level enrollments. Last year, 48% reported increases, 21% reported declines, and 31% reported level enrollments.
- Of the responding Master's institutions, 42% (59 responding institutions) reported increases, 35% (49 institutions) reported declines, and 23% (32 institutions) reported level enrollments. Last year, 57% reported increases, 22% reported declines, and 21% reported level enrollments.

Figure 2a: Newly enrolled international students, Fall 2009 compared to Fall 2008.

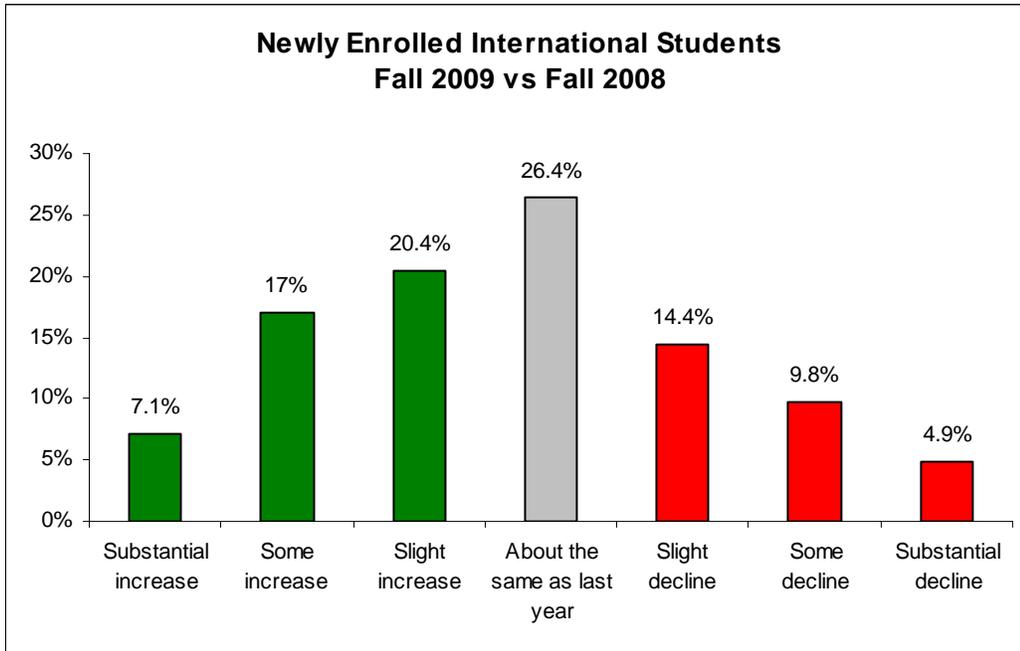


Figure 2b: Newly enrolled international students at institutions enrolling more than 1,000 international students, Fall 2009 compared to Fall 2008.

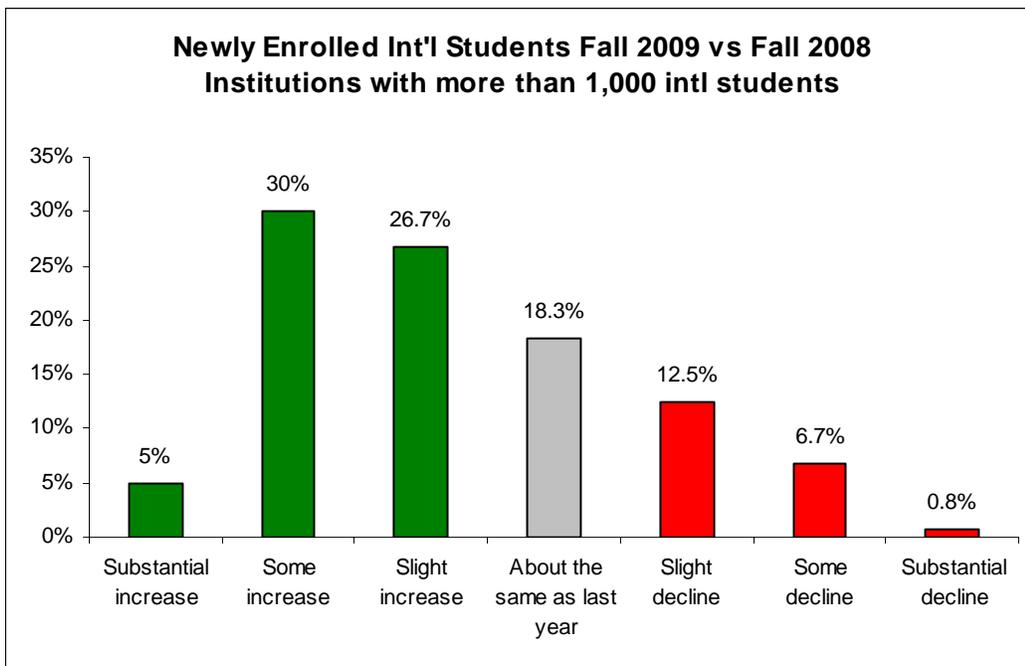


Table 2c: Two-Year Colleges:

Newly enrolled international students at institutions at two-year colleges, Fall 2009 compared to Fall 2008.

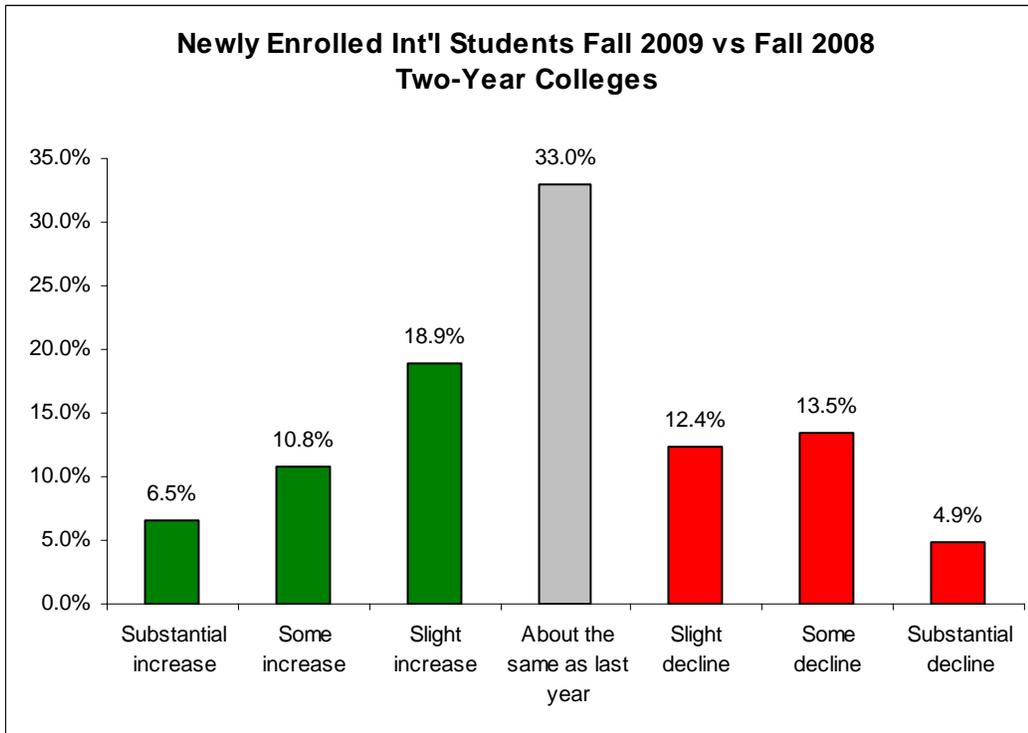


Figure 2d: Doctoral/Research Institutions:

Newly enrolled international students at institutions at Doctoral/Research institutions, Fall 2009 compared to Fall 2008.

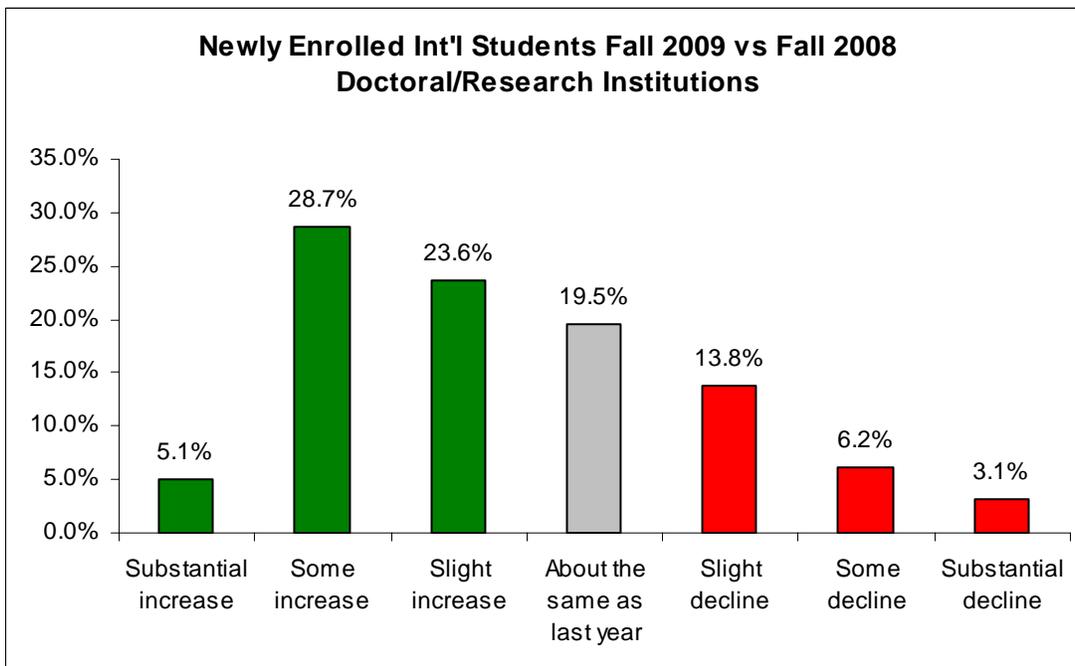


Figure 2e: Baccalaureate Institutions:
Newly enrolled international students at institutions at Baccalaureate Institutions, Fall 2009 compared to Fall 2008.

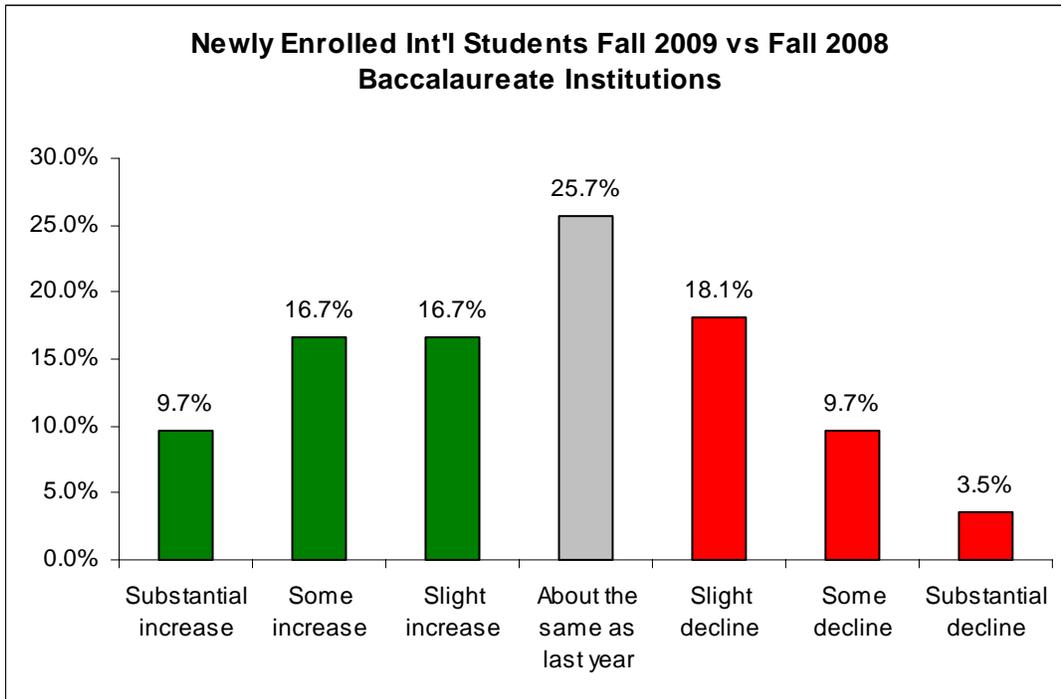
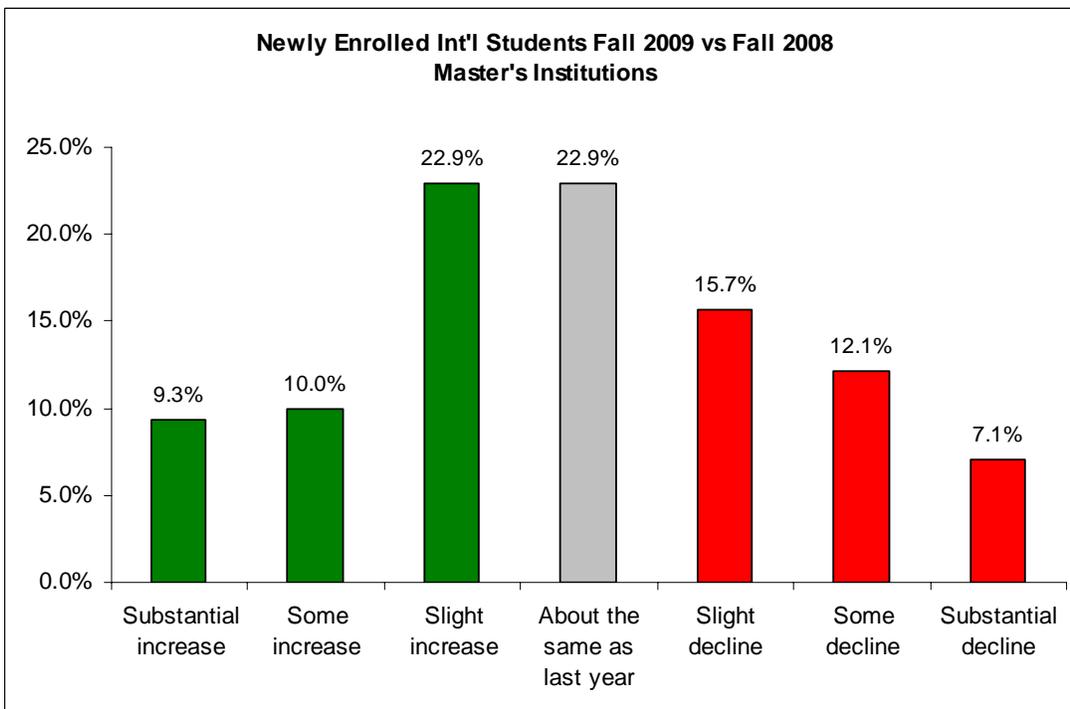


Figure 2f: Master's Institutions:
Newly enrolled international students at institutions at Master's Institutions, Fall 2009 compared to Fall 2008.



TOTAL INTERNATIONAL STUDENT ENROLLMENTS

Figure 3a-3f: Changes in total International Student Enrollments

How has the total enrollment of international students at your institution changed this fall (Fall 2009), compared to Fall 2008?

- Of all responding institutions, 50% (348 respondents) reported an increase, 24% (169) reported a decline, and 26% (177) reported level enrollments. Last year, 57% reported an increase, 16% reported a decline, and 27% reported level enrollments.
- Of the responding institutions that enroll more than 1,000 international students (121 institutions), 67% (81 responding institutions) reported increases, 12% (15 institutions) reported declines, and 21% (25 institutions) reported level enrollments. Last year, 75% reported increases, 6% reported declines, and 19% reported level enrollments.
- Of the responding two-year colleges, 42% (77 responding institutions) reported increases, 29% (53 institutions) reported declines, and 29% (53 institutions) reported level enrollments. Last year, 55% reported increases, 15% reported declines, and 30% reported level enrollments.
- Of the responding Doctoral/Research institutions, 66% (128 institutions) reported increases, 15% (29 institutions) reported declines, and 19% (37 institutions) reported level enrollments. Last year, 65.5% reported increases, 10.9% reported declines, and 23.6% reported level enrollments.
- Of the responding Baccalaureate institutions, 48% (68 institutions) reported increases, 27% (38 institutions) reported declines, and 25% (35 institutions) reported level enrollments. Last year, 53.4% reported increases, 19.2% reported declines, and 27.4% reported level enrollments.
- Of the responding Master's institutions, 43.9% (61 institutions) reported increases, 29.5% (41 institutions) reported declines, and 26.6% (37 institutions) reported level enrollments. Last year, 64% reported increases, 20% reported declines, and 26% reported level enrollments.

Figure 3a: Total International Student Enrollments, Fall 2009 compared to Fall 2008.

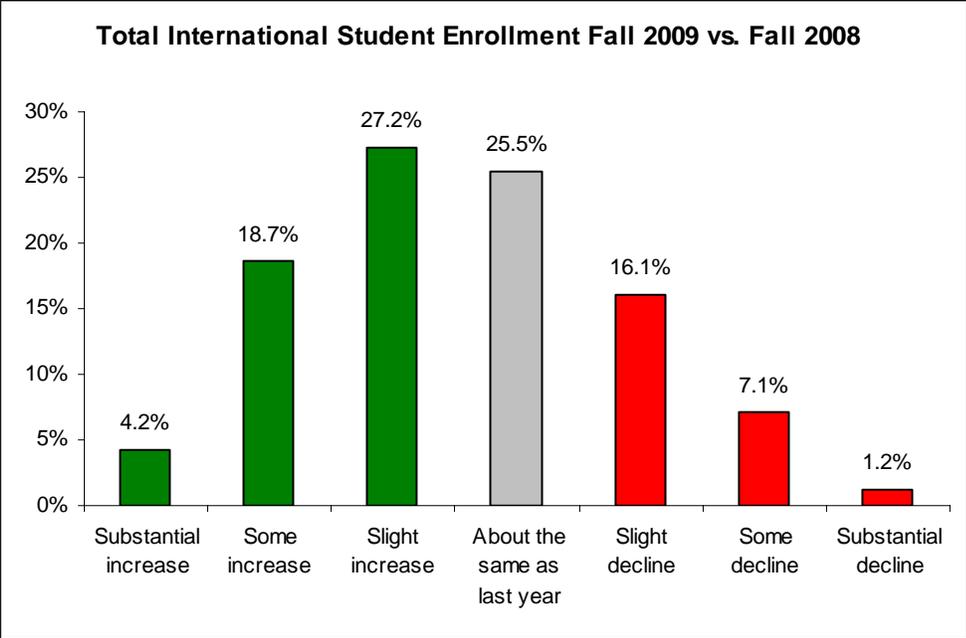


Figure 3b: Total international student enrollments at institutions with more than 1,000 international students, Fall 2009 vs. Fall 2008.

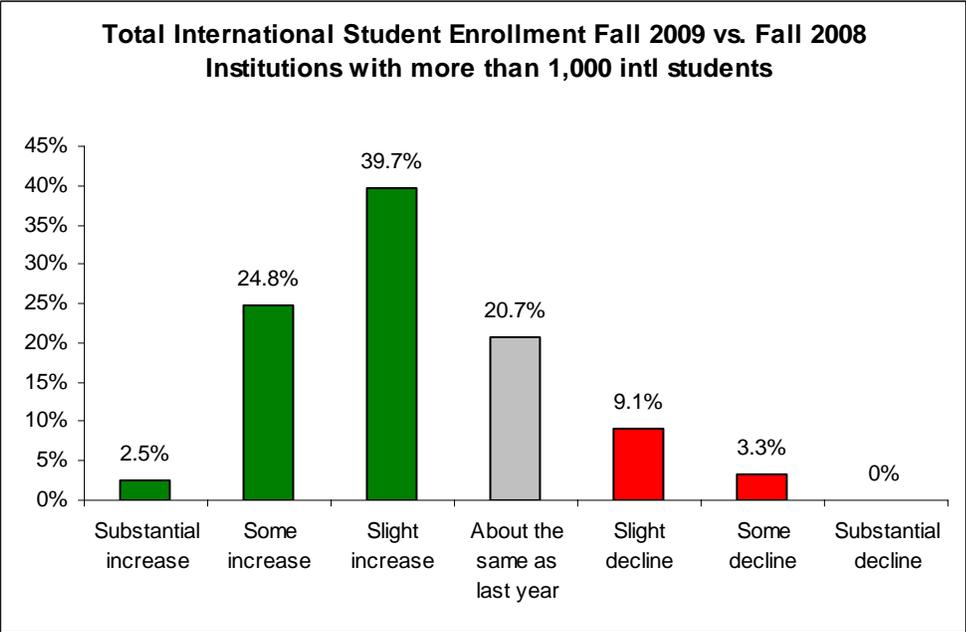


Figure 3c: Two-Year Colleges: Total international student enrollments at two-year colleges, Fall 2009 vs. Fall 2008.

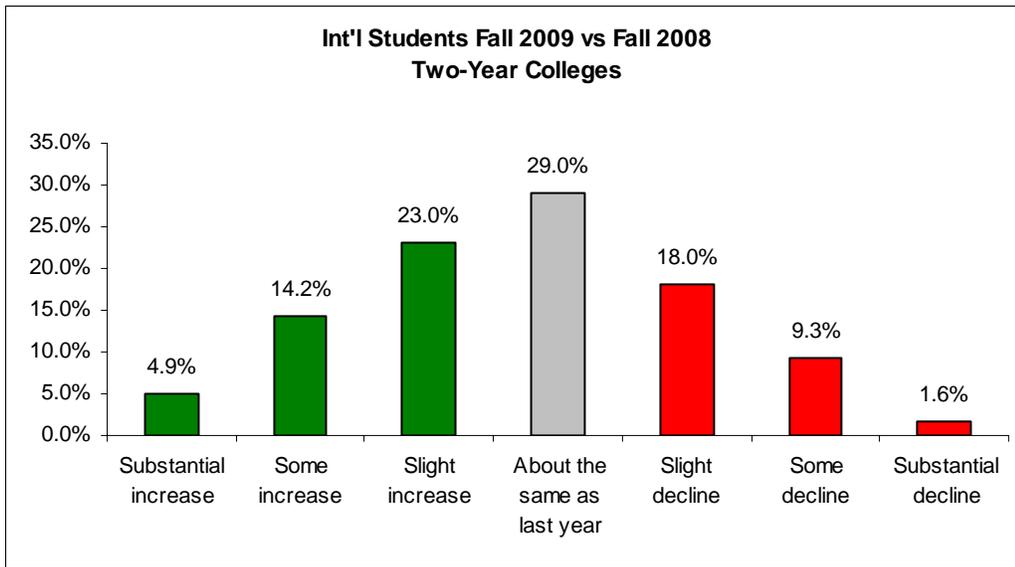


Figure 3d: Doctoral/Research Institutions: Total international student enrollments at Doctoral/Research institution, Fall 2009 vs. Fall 2008.

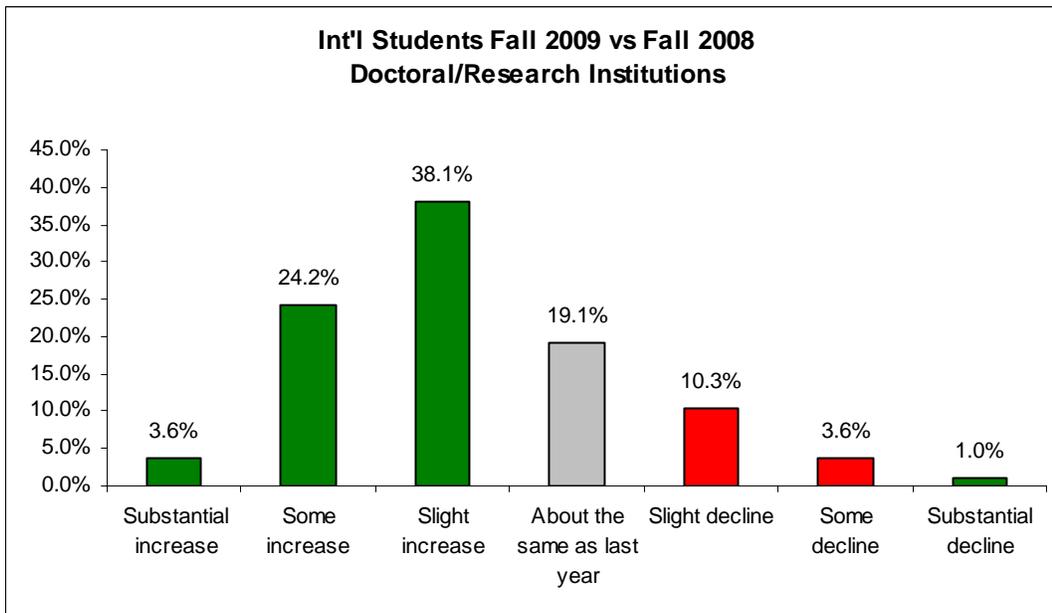


Figure 3e: Baccalaureate Institutions: Total international student enrollments at Baccalaureate institutions, Fall 2009 vs. Fall 2008.

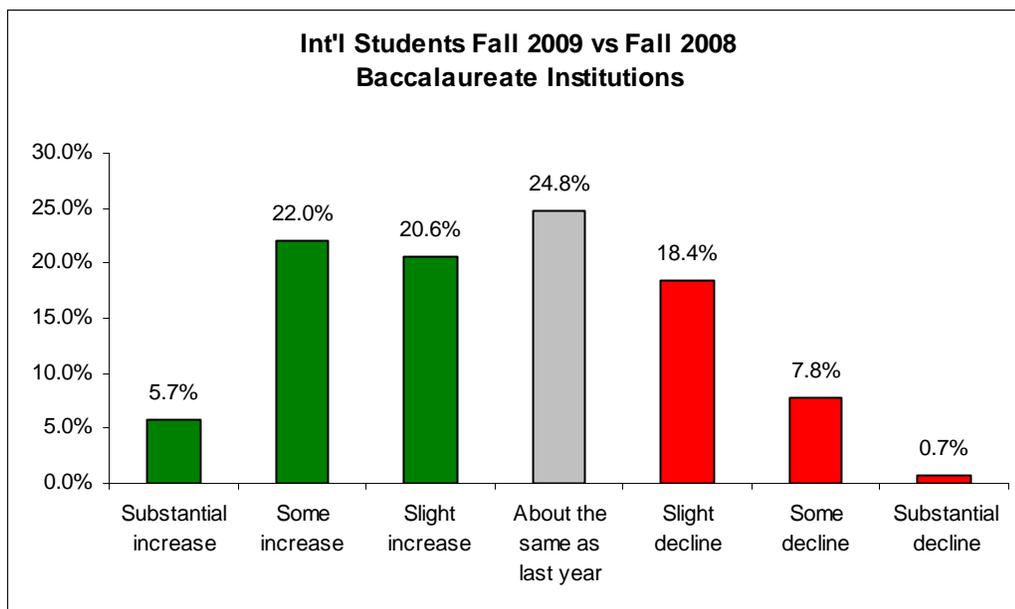
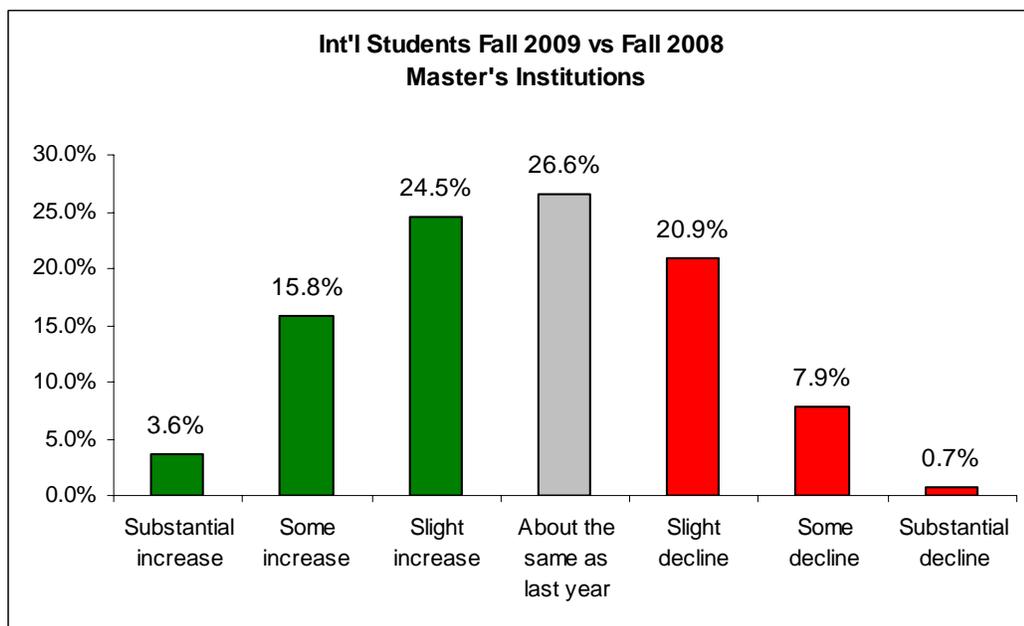


Figure 3f: Master's Institutions: Total international student enrollments at Master's institutions, Fall 2009 vs. Fall 2008.



COUNTRY BREAKDOWN: **NEW INTERNATIONAL STUDENT ENROLLMENTS**

What change, if any, have you noticed for Fall 2009 compared to Fall 2008 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 decline³:
 - China (60% reporting increases vs. 11% reporting declines, and the rest reporting level enrollments)
 - Saudi Arabia (30% reporting increases vs. 10% reporting declines)
 - Brazil (26% reporting increases vs. 18% reporting declines)

- For Japan and Indonesia, more institutions reported a decline than an increase.
 - Japan (30% reporting a decline vs. 19% reporting an increase)
 - Indonesia (18% reporting a decline vs. 13% reporting an increase)

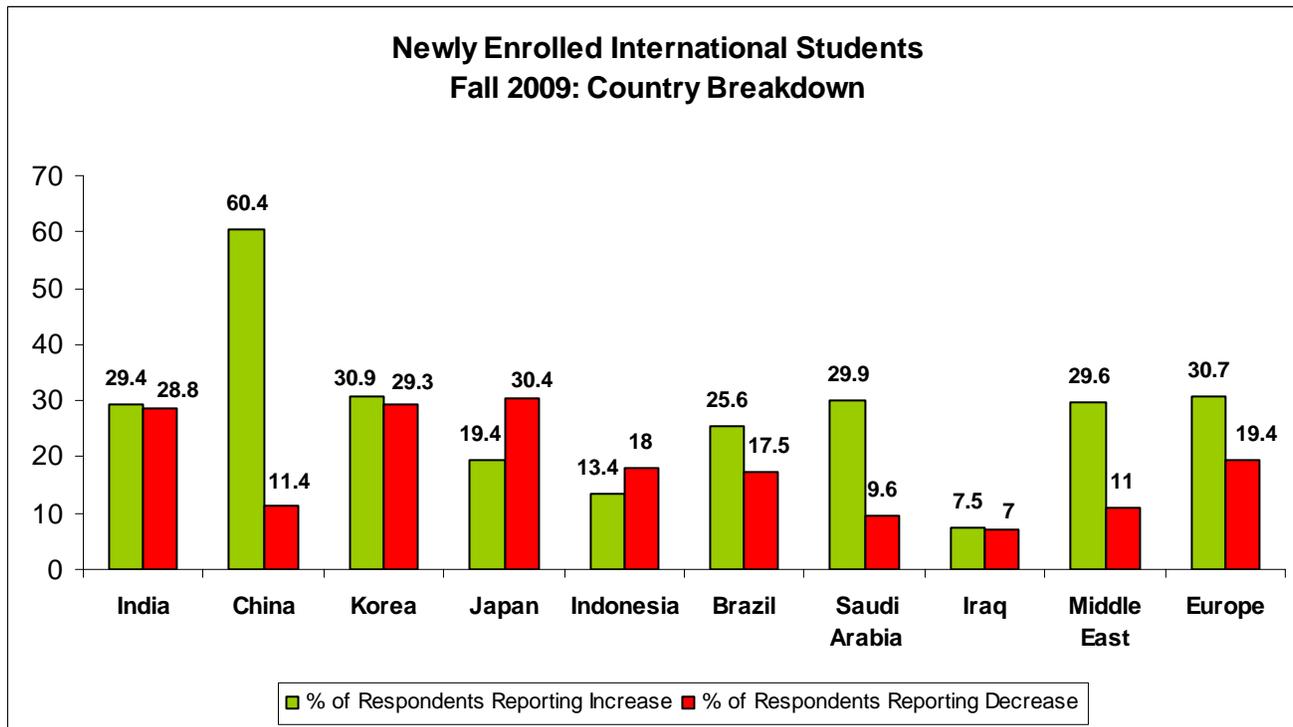
- For India, roughly the same number of institutions reported increases and declines. When looking specifically at the largest host institutions (those 121 responding institutions enrolling more than 1,000 students), 50% of responding institutions are reporting a decline and only 31% are reporting an increase.

- For Middle East as a region, 30% of respondents reported an increase and 11% reported a decline. Middle East was defined as: *Bahrain, Cyprus, Iran, 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. Iraq was also listed separately, but most institutions reported no significant changes.*

- For Europe as a region, 31% of respondents reported an increase and 19% reported a decline. For the purposes of this survey, Turkey and Cyprus were included in Europe.

³ 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.

Figure 4: Country Breakdown: Reported increases and declines in the number of newly enrolled international students, Fall 2009 compared to Fall 2008.



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?

- Fifty-seven percent (395) of all responding institutions have taken special steps to ensure that the number of international students on their campuses does not decline, while 43% (299) have not taken any special steps.
- Special steps included new staff or additional staff time devoted to international recruitment (cited by 29%) and new international programs or collaborations (cited by 27%), followed by new funding for international recruitment trips (20%), and new funding for marketing and promotion of programs (15%). Other steps included increasing scholarships and financial aid available to international students, more online recruiting, better communication with prospective students, improved international admissions processes, stronger retention efforts, new online marketing and social media efforts, and working with agents or recruiters.
- The institutions that did not take special steps mainly cited a lack of funding or resources (25%) and continued existing policies for international student recruitment (16%).
- Institutions that have devoted more resources for international student recruitment trips seem to have concentrated mainly on Asia. Thirty percent of responding institutions specifically devoted resources to recruit international students from China, followed by countries in Southeast Asia (16%), India (15%), and Korea (13%). Institutions also devoted more resources to recruitment trips to Latin America (11%), the Middle East (10%), Europe (8%), and Africa (3%). In written responses, many institutions indicated also recruiting students in Vietnam, Thailand, Canada, and the Caribbean.

Figure 5a: Special Steps
Institutions taking special steps to ensure numbers of international students do not decline

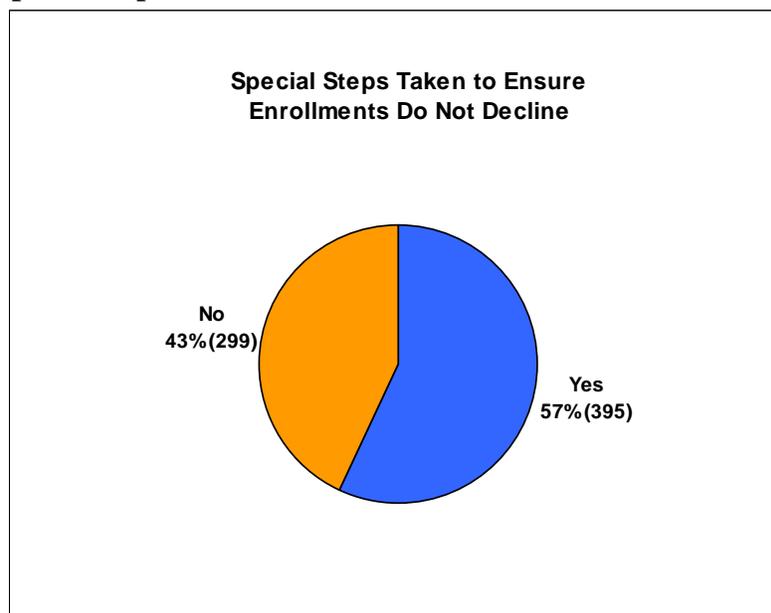


Figure 5b: Which steps were taken?

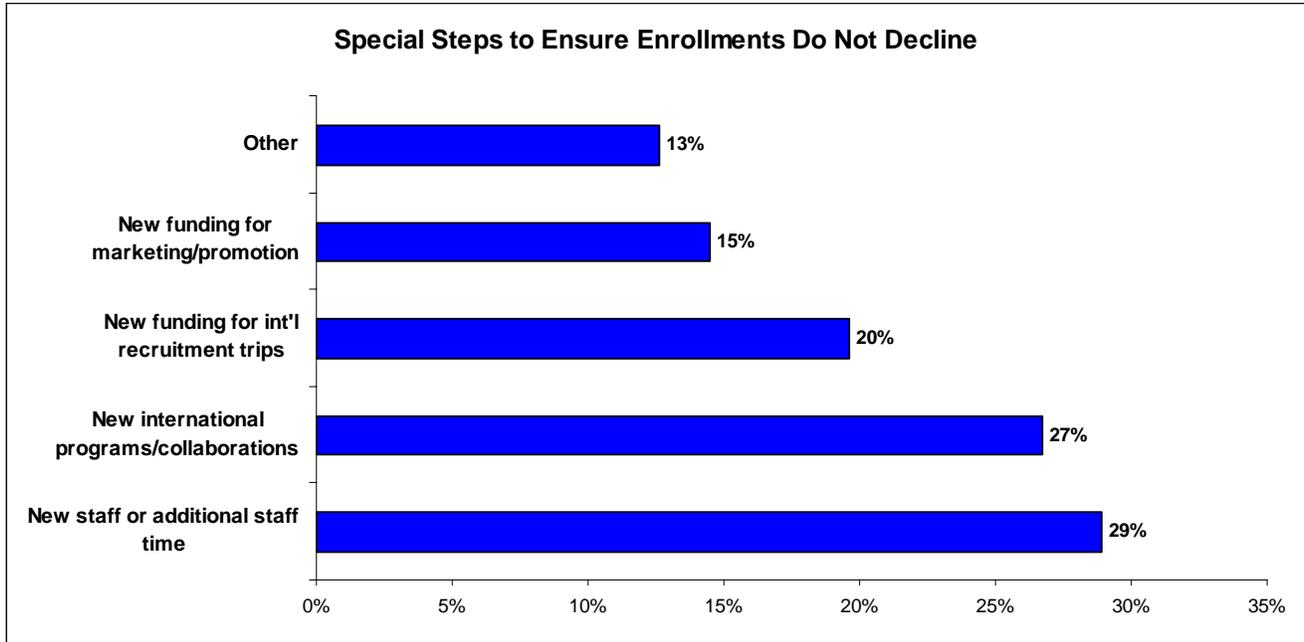


Figure 5c: If no special steps were taken, why not?

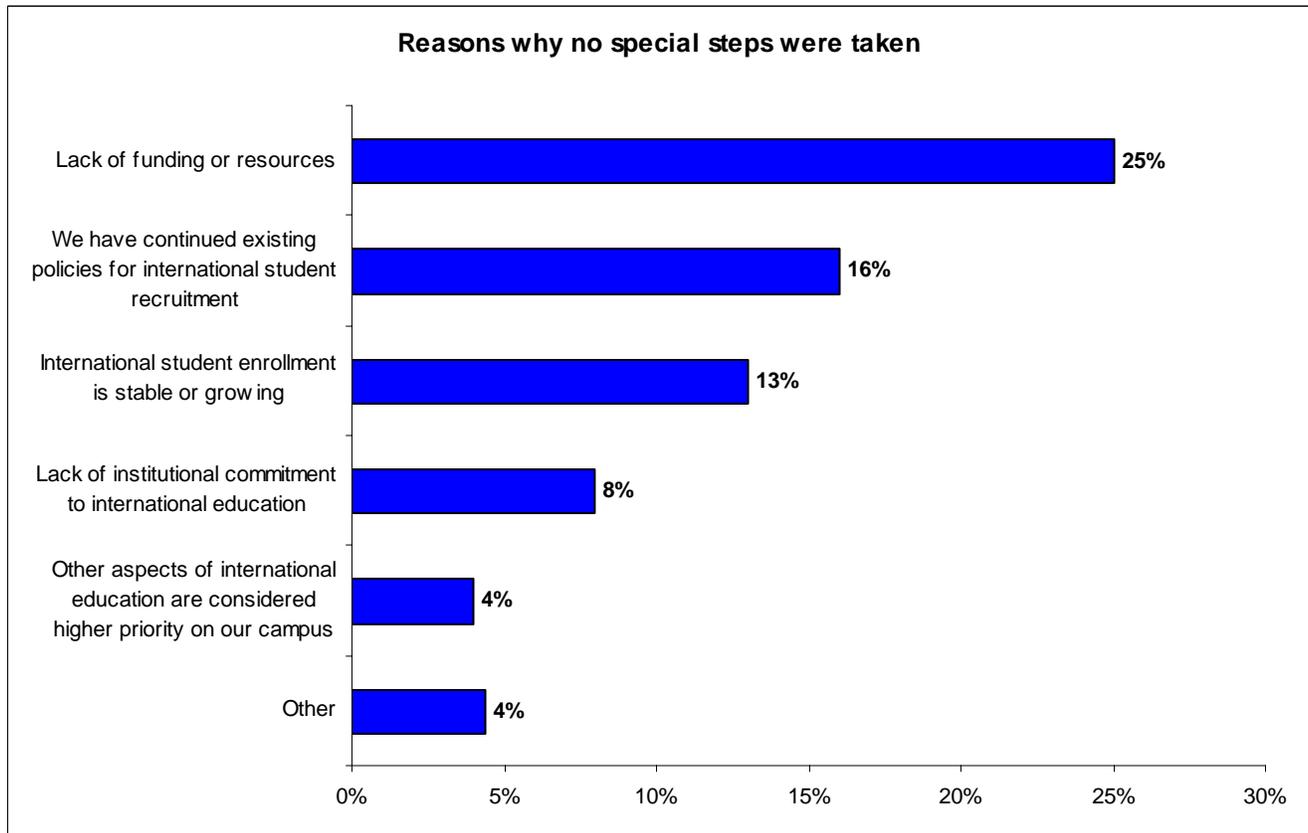
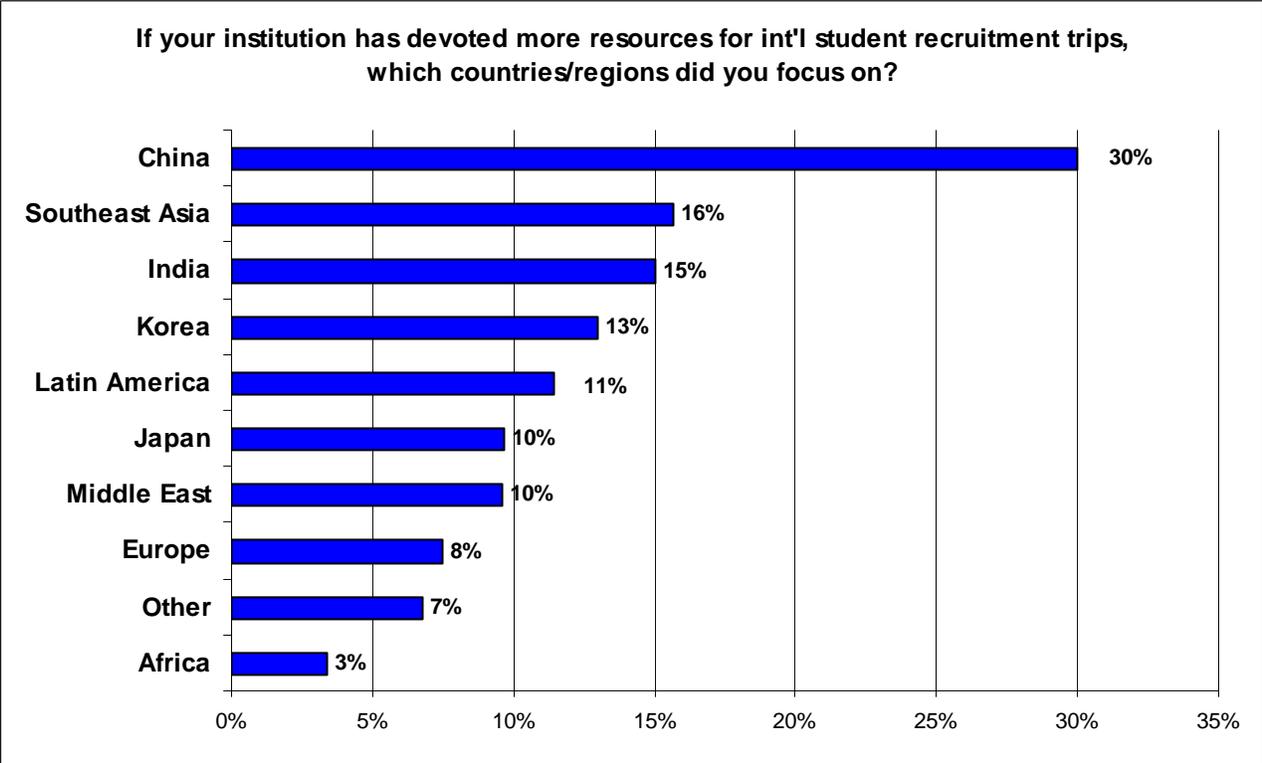


Figure 5d: If your institution has devoted more resources for international student recruitment trips, which countries/regions did you focus on?



MAJOR REASONS FOR REPORTED DECLINES/INCREASES IN ENROLLMENTS

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

- Of the institutions reporting increases in international student enrollments, 28% (197 responding institutions) indicated that more active recruitment efforts was a major reason for increases at their institutions, followed by a growing reputation and visibility of the U.S. host institution abroad (cited by 26%), and an increased number of linkages with international universities (13%).
- Twenty-three percent (161 institutions) of the responding institutions experiencing declines in international student enrollments cited the world financial crisis as the major reason for the decline, followed by cost of tuition/fees at U.S. institutions (21%) and home country economic problems (19%). Of the 60 respondents (or 9%) who chose “other” as their response, many indicated international students’ concerns about the swine flu, lack of financial aid or scholarships for international students, less on-campus employment opportunities and a poor U.S. job market.
- Of the institutions who attributed the declines to the world financial crisis, 23% believe that home country economic problems are the major reason, based on feedback from international applicants, followed by less scholarship money available for students (12%) and students’ difficulty in obtaining loans (10%).

Figure 6: Major Reasons for Reported Increases in Enrollments

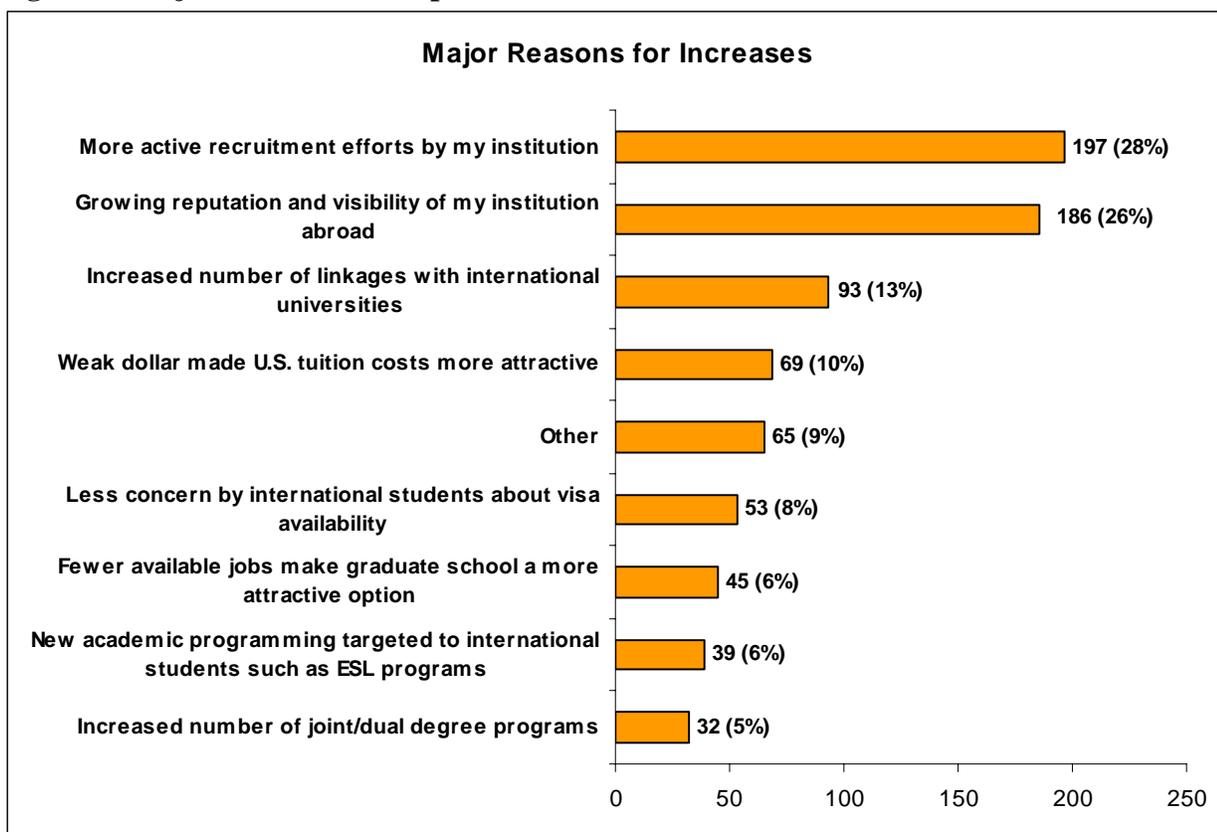


Figure 7: Major Reasons for Reported Declines in Enrollments

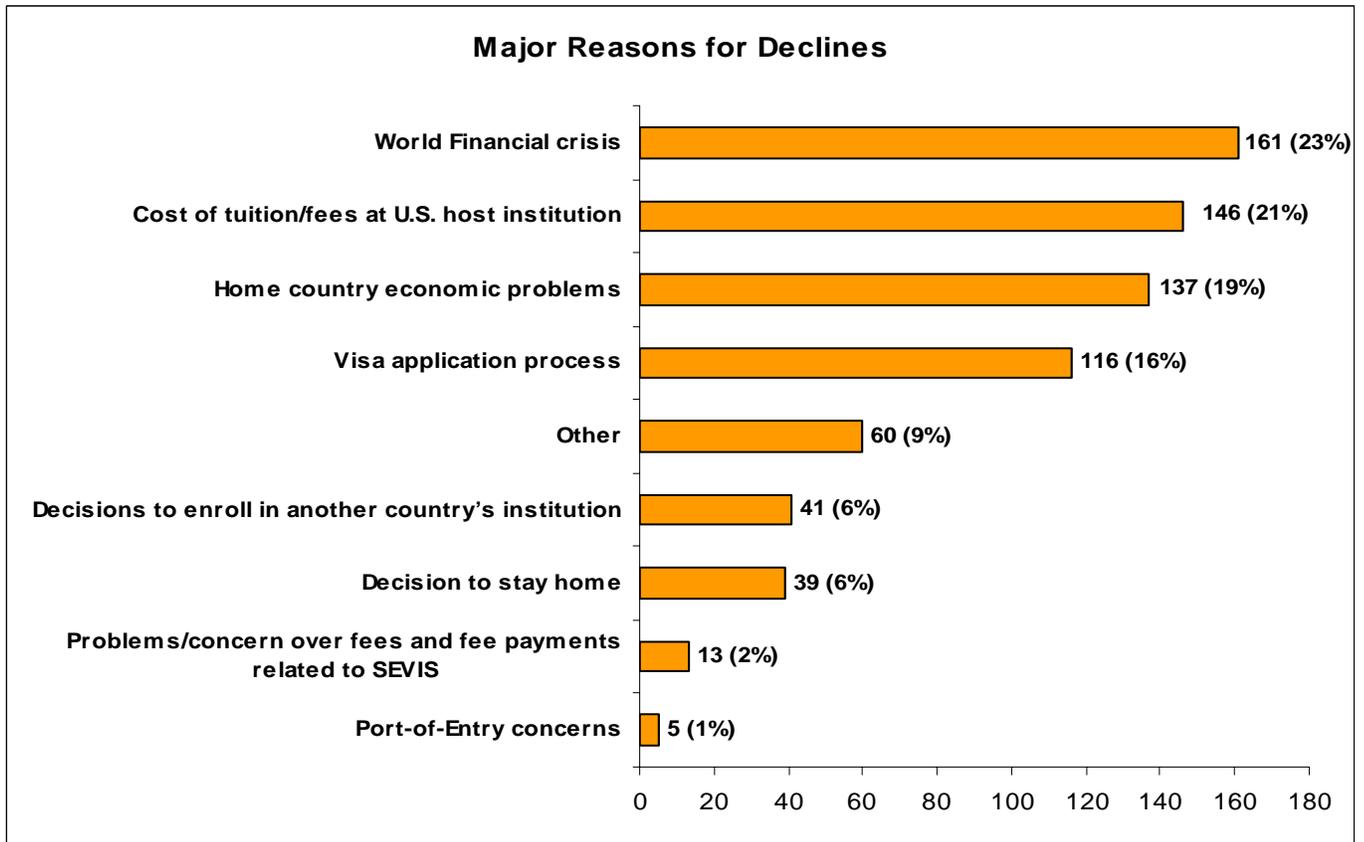
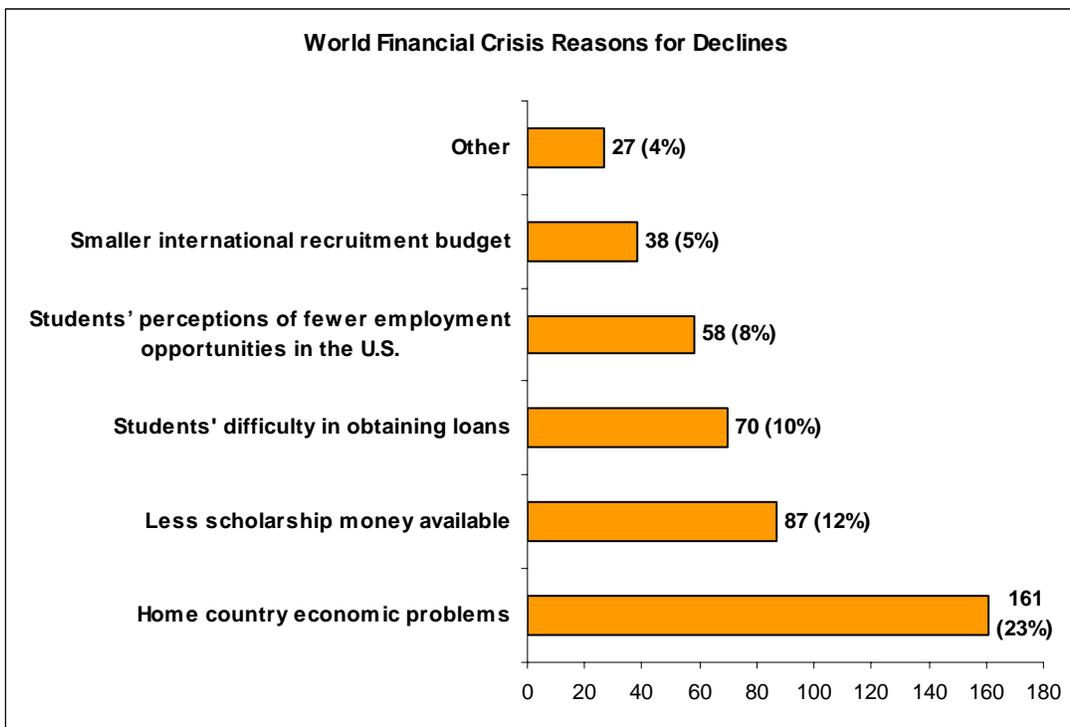


Figure 8: Reasons for Declines related to World Financial Crisis

If you attribute the declines to the world financial crisis, what do you believe are the major reasons based on feedback from international applicants?



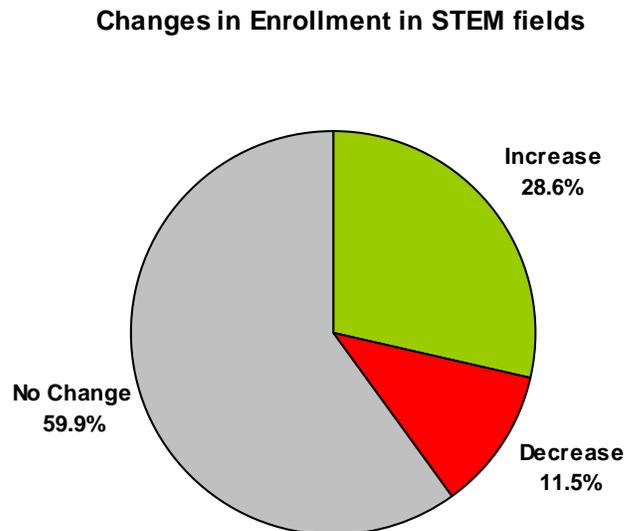
FIELDS OF STUDY

STEM Fields

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 2009) compared to Fall 2008.

- 28.6% of respondents reported an increase in international student enrollments in STEM fields (Science, Technology, Engineering, and Mathematics), 11.5% reported a decline, and 59.9% saw no change.

Figure 9: Enrollment changes in STEM fields

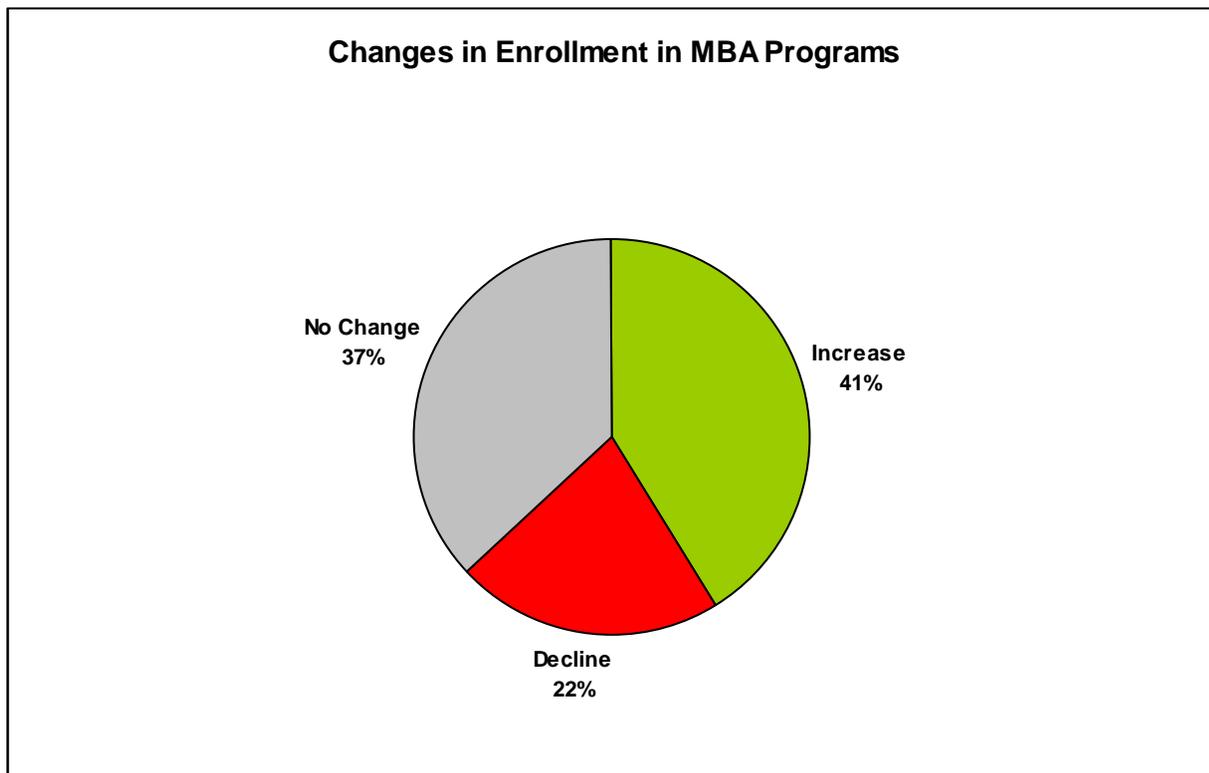


MBA Programs

If your institution has an MBA Program, please indicate whether this program has experienced any changes in the number of newly enrolled international students this year (Fall 2009) compared to Fall 2008.

- Of the respondents who indicated that they offered MBA programs, 41% reported an increase in international student enrollments in MBA Programs, 22% reported a decline, and 37% saw no change.

Figure 10: Enrollment changes MBA programs

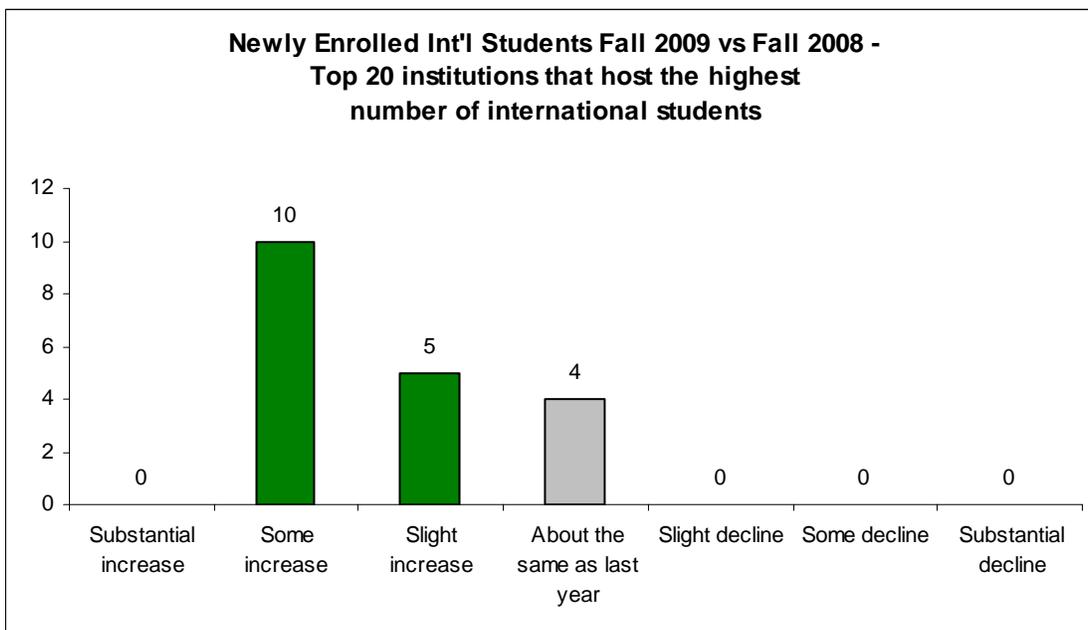


RESPONSES FROM THE TOP 20 HOST INSTITUTIONS THAT ENROLL THE HIGHEST NUMBER OF INTERNATIONAL STUDENTS

Nineteen out of the top 20 host institutions⁴ responded to this survey.

- All 19 responding institutions that host the highest numbers of international students report increases in the number of newly enrolled international students on their campuses this year.
- Looking at overall international student enrollments, all 19 respondent institutions reported an increase.

Figure 11a: Newly enrolled international students at the Top 20 institutions that enroll the highest numbers of international students, Fall 2009 compared to Fall 2008.



⁴ The top 20 host institutions (according to *Open Doors 2008 Report on International Educational Exchange*) refer to the 20 institutions nationally that host the largest numbers of international students on their campuses.

Figure 9b: Overall international student enrollments at the Top 20 institutions that enroll the highest numbers of international students, Fall 2009 compared to Fall 2008.

