

# **FALL 2012 INTERNATIONAL STUDENT ENROLLMENT SURVEY**

November 2012

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:

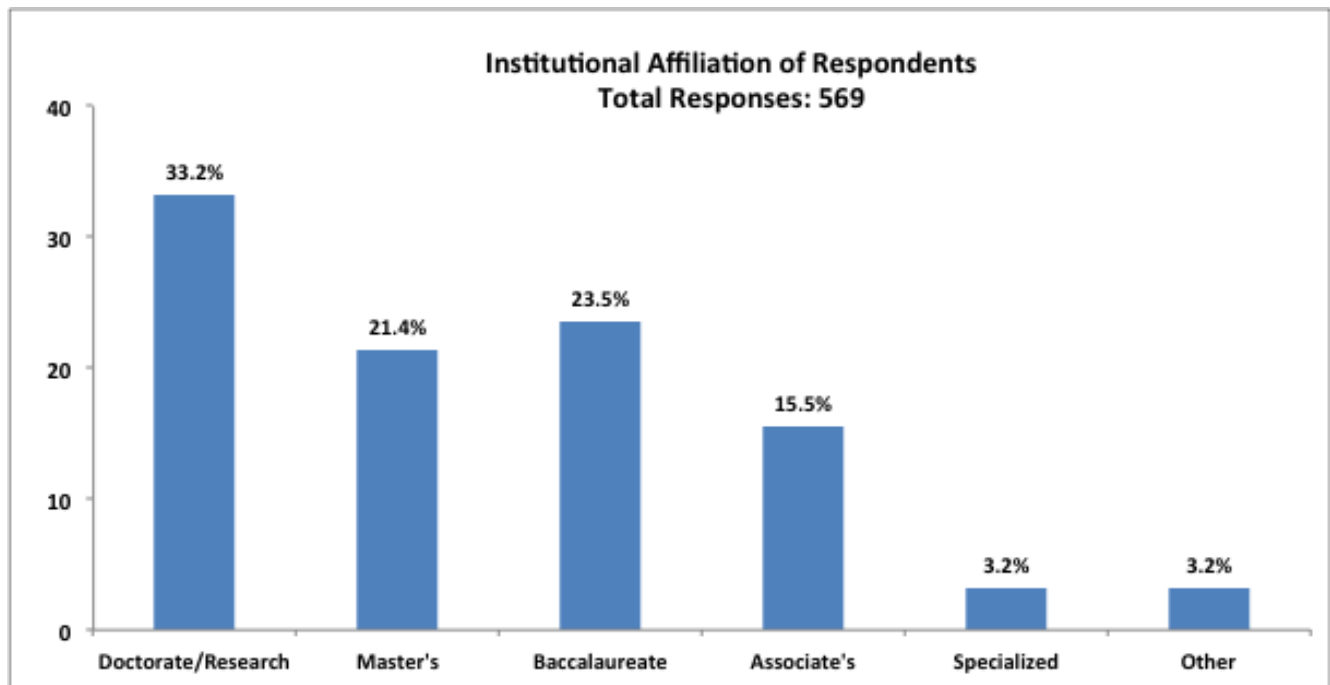
- American Association of Community Colleges (AACCC)
- American Association of State Colleges and Universities (AASCU)
- American Council on Education (ACE)
- Association of American Universities (AAU)
- Association of Public and Land-grant Universities (APLU)
- Council of Graduate Schools (CGS)
- Institute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

The survey was conducted between October 1 and 19, 2012.

## **RESPONDENTS**

- The survey received responses from 569 U.S. higher education institutions from all institutional types. Doctoral/research institutions represented the largest group of respondents, with 33.2% (189 respondents), followed by Baccalaureate institutions with 23.5% (134 respondents). Master's institutions represented 21.4% (122) of respondents, followed by Associate's institutions with 15.5% (88). Specialized institutions and other types of institutions both had 3.2% (total of 36 respondents).
- Of the institutions, 55% (313) were public institutions and about 45% (256) were private institutions.
- The survey received responses from 120 institutions that enroll more than 1,000 international students.
- All of the top 20 host institutions responded.<sup>1</sup>

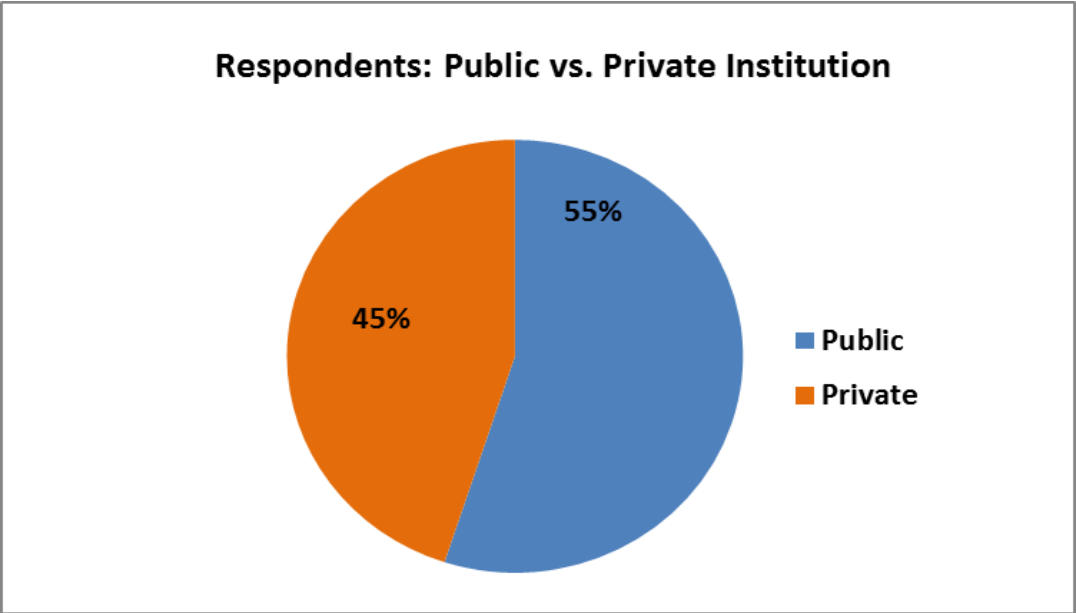
**Figure 1: Respondents. Total Responses<sup>2</sup>**



<sup>1</sup> The top 20 host institutions (according to *Open Doors 2012 Report on International Educational Exchange*) refer to the 20 institutions nationally that host the largest numbers of international students on their campuses.

<sup>2</sup> 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 2012) compared to Fall 2011?*

- Of all responding institutions, 56.4% (or 320 respondents) reported an increase, 23.1% (131) reported a decline, and roughly 20.5% (116) reported level enrollments. Last year, 52.4% reported an increase, 22.9% a decline, and 24.7% level enrollments. Responses were obtained from 567 of the total respondents for this question.
- Of the responding institutions that enroll more than 1,000 international students (120 institutions that responded to this question), 76.7% (92 responding institutions) reported increases, 14.2% (17 institutions) reported declines, and 9.2% (11 institutions) reported level enrollments. Last year, 60.4% (81 responding institutions) reported increases, 17.2% (23 institutions) reported declines, and 22.4% (30 respondents) reported level enrollments.
- Of the responding two-year colleges, 38.6% (34 responding institutions) reported increases, 31.8% (28 institutions) reported declines, and about 29.5% (26 institutions) reported level enrollments. Last year, 31.5% (40 responding institutions) reported increases, 27.6% (35 institutions) reported declines, and 40.9% (52 institutions) reported level enrollments.
- Of the responding Research/Doctoral institutions, 67.4% (126 responding institutions) reported increases, 18.7% (35 institutions) reported declines, and 13.9% (26 institutions) reported level enrollments. Last year, 67.3% (144 responding institutions) reported increases, 17.8% (38 institutions) reported declines, and 14.9% (32 institutions) reported level enrollments.
- Of the responding Baccalaureate institutions, about 56% (75 responding institutions) reported increases, 23.9% (32 institutions) reported level enrollments and 20.1% (27 institutions) reported declines. Last year, 50.8% (93 responding institutions) reported increases, 27.9% (51 institutions) reported level enrollments, and 21.3% (39 institutions) reported declines.
- Of the responding Master's institutions, 54.1% (66 responding institutions) reported increases, 27% (33 institutions) reported declines, and about 18.9% (23 institutions) reported level enrollments. Last year, 48.1% (89 responding institutions) reported increases, 28.1% (52 institutions) reported declines, and 23.8% (44 institutions) reported level enrollments.

Figure 2a: Newly enrolled international students, Fall 2012 compared to Fall 2011.

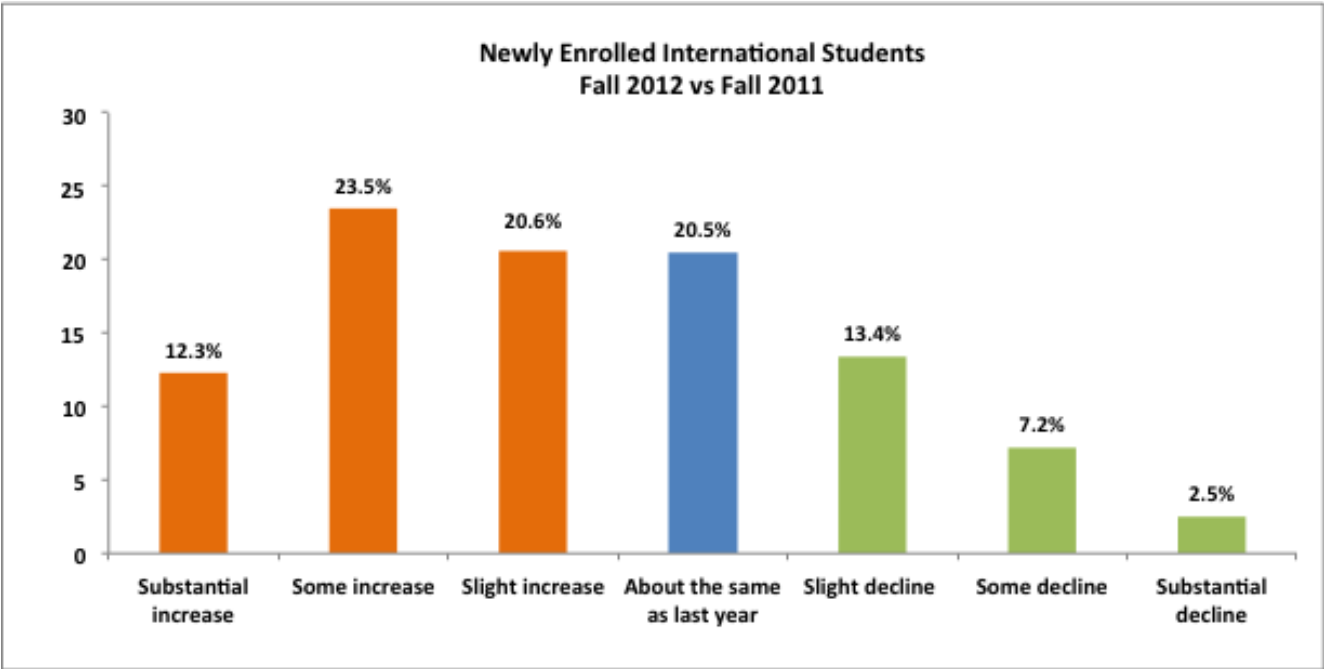
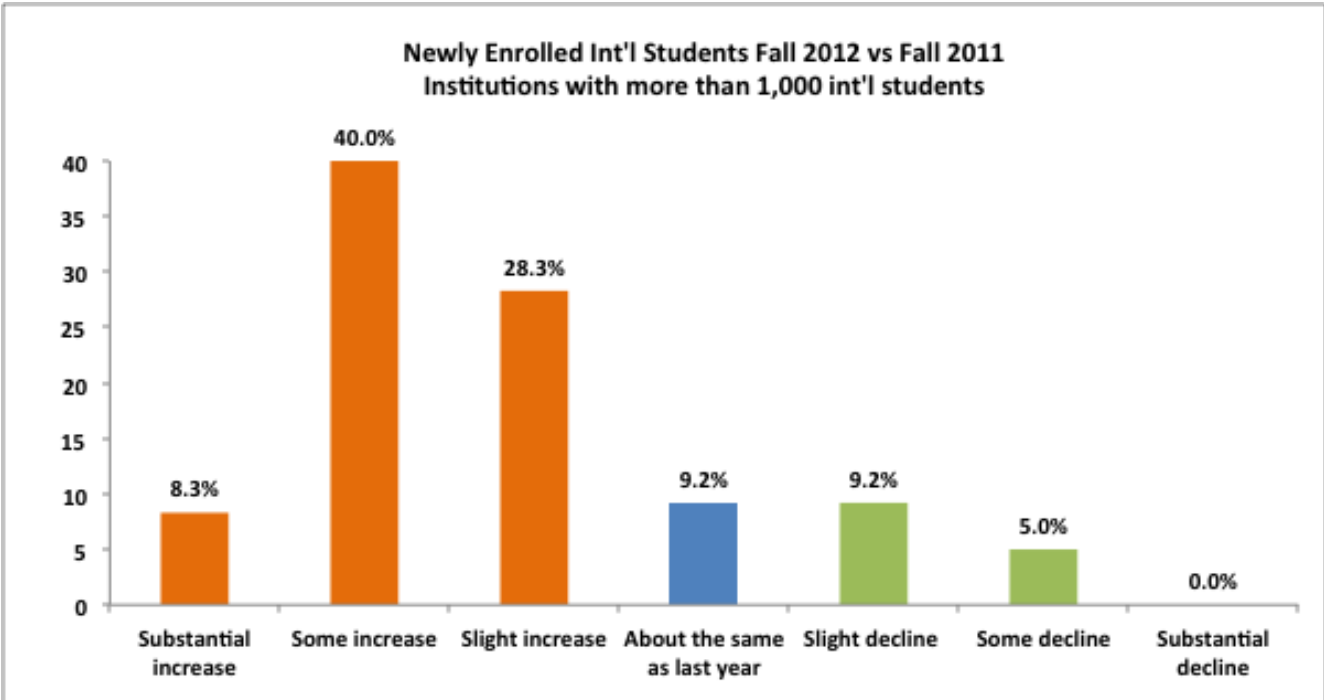
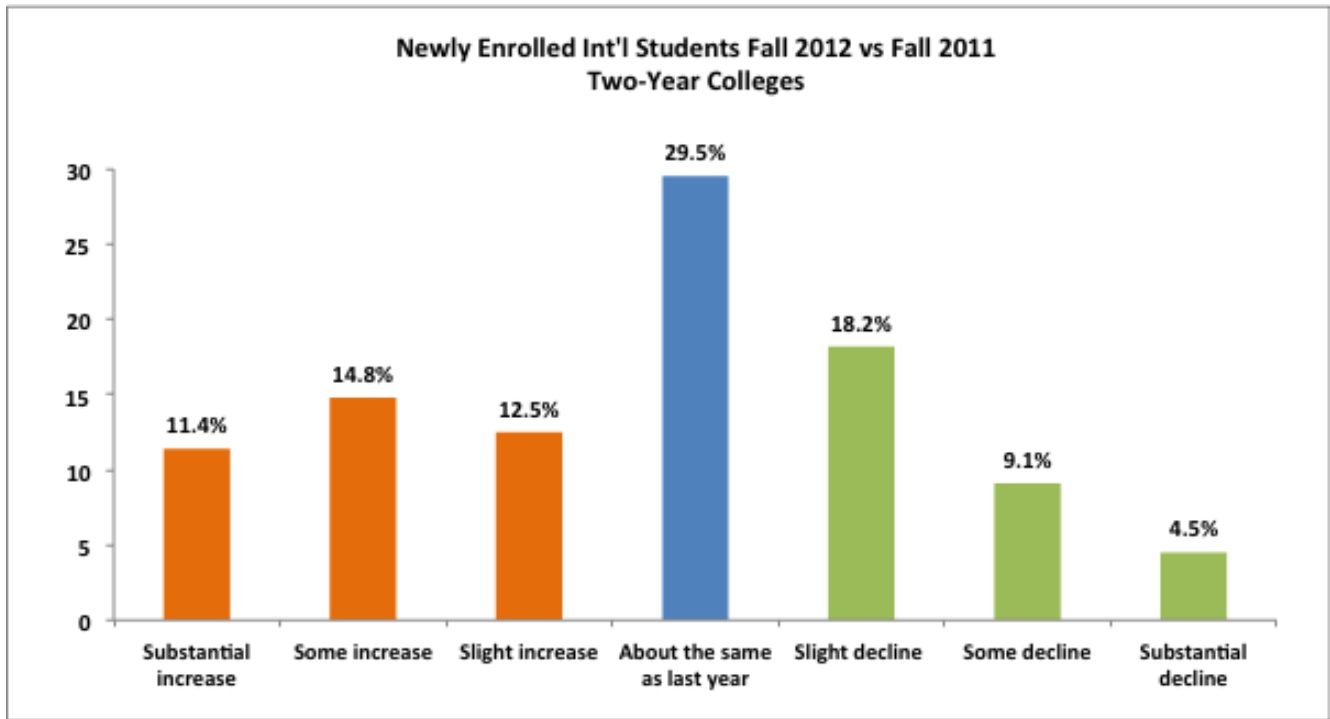


Figure 2b: Newly enrolled international students at institutions enrolling more than 1,000 international students, Fall 2012 compared to Fall 2011.



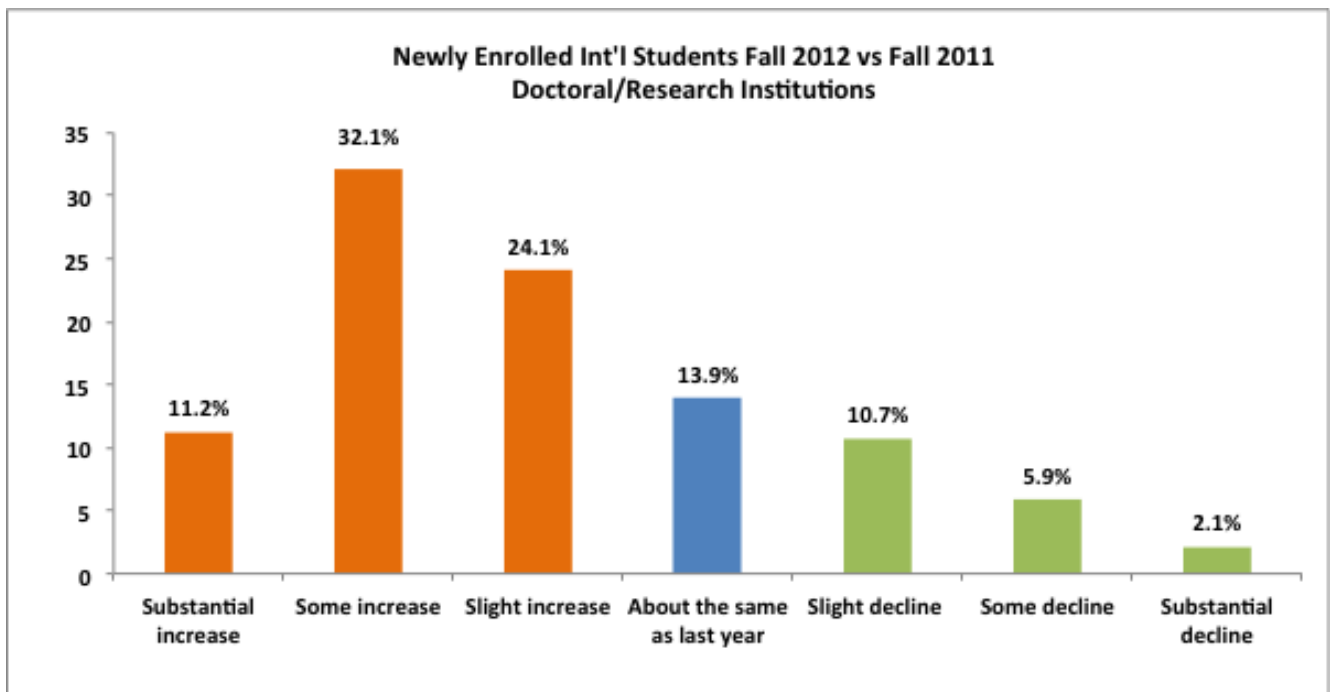
**Table 2c: Two-Year Colleges:**

**Newly enrolled international students at institutions at two-year colleges, Fall 2012 compared to Fall 2011.**

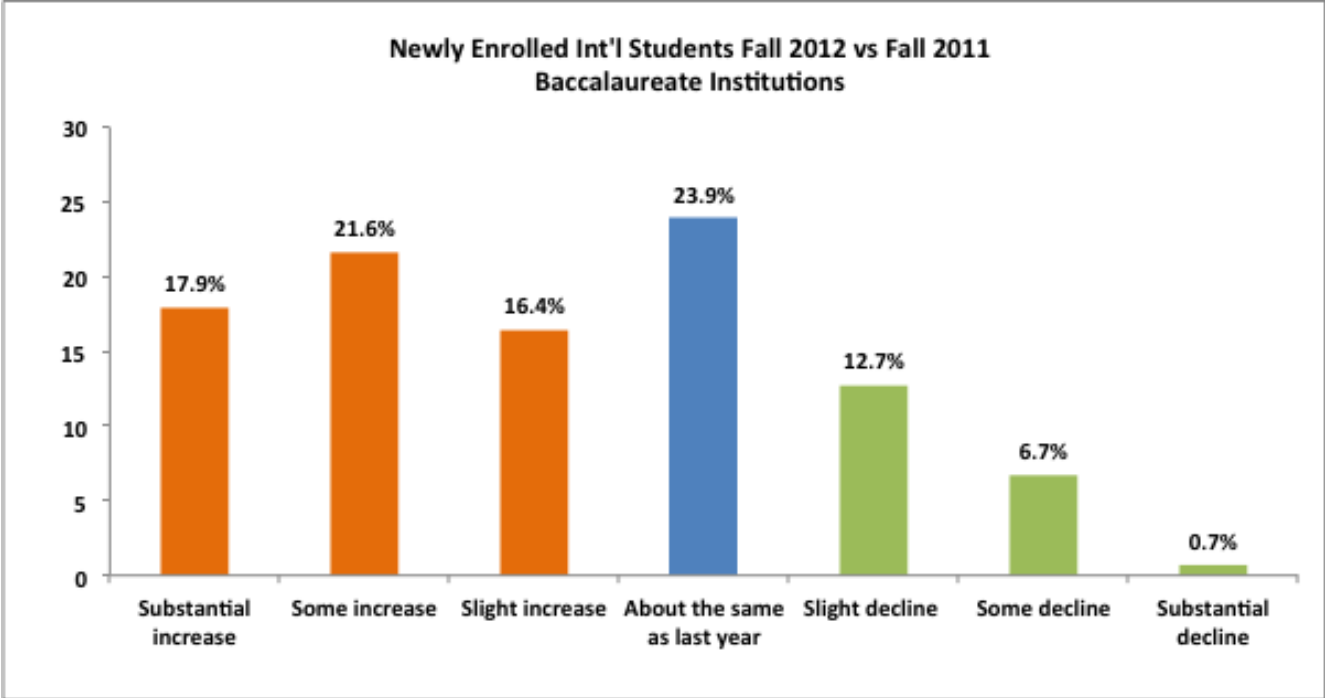


**Figure 2d: Doctoral/Research Institutions:**

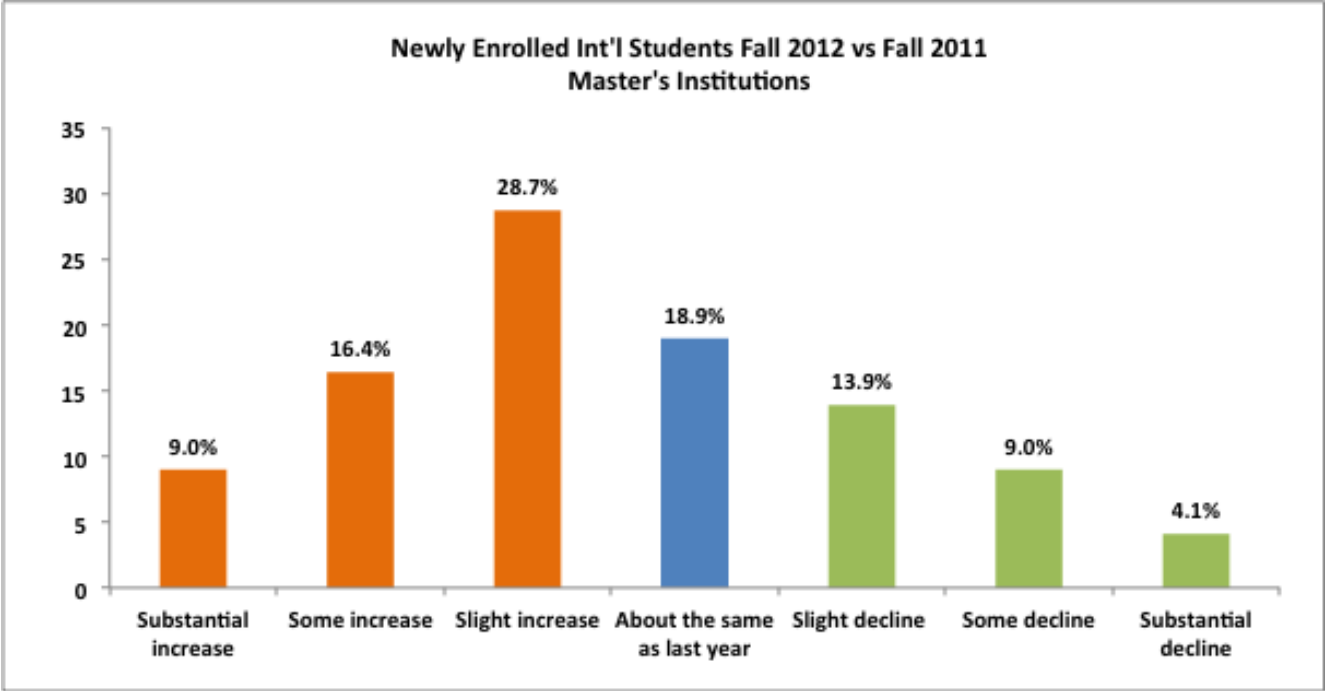
**Newly enrolled international students at institutions at Doctoral/Research institutions, Fall 2012 compared to Fall 2011.**



**Figure 2e: Baccalaureate Institutions:**  
**Newly enrolled international students at institutions at Baccalaureate Institutions, Fall 2012 compared to Fall 2011.**



**Figure 2f: Master's Institutions:**  
**Newly enrolled international students at institutions at Master's Institutions, Fall 2012 compared to Fall 2011.**



## **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 2012), compared to Fall 2011?*

- Of all 561 responding institutions, 60.6% (or 340 respondents) reported an increase, 17.3% (97) reported a decline, and 22.1% (124) reported level enrollments. Last year, 53.2% (or 391 respondents) reported an increase, 20.1% (148) reported a decline, and 26.7% (196) reported level enrollments.
- Of the responding institutions that enroll more than 1,000 international students (117 institutions that responded to this question), 83.8% (98 responding institutions) reported increases, 3.4% (4 institutions) reported declines, and 12.8% (15 institutions) reported level enrollments. Last year, 80.2% (105 responding institutions) reported increases, 7.6% (10 institutions) reported declines, and 12.2% (16 institutions) reported level enrollments.
- Of the responding two-year colleges, 40.7% (35 responding institutions) reported increases, 34.9% (30 institutions) reported declines, and 24.4% (21 institutions) reported level enrollments. Last year, 53.7% (65 responding institutions) reported increases, 19% (23 institutions) reported declines, and 27.3% (33 institutions) reported level enrollments.
- Of the responding Baccalaureate institutions, 56.7% (76 responding institutions) reported increases, 13.4% (18 institutions) reported declines, and about 29.9% (40 institutions) reported level enrollments. Last year, 52% (94 responding institutions) reported increases, 21.5% (39 institutions) reported declines, and 26.5% (48 institutions) reported level enrollments.
- Of the responding Master's institutions, 62.8% (76 responding institutions) reported increases, 20.7% (25 institutions) reported declines, and 16.5% (20 institutions) reported level enrollments. Last year, 52.7% (97 responding institutions) reported increases, 19% (35 institutions) reported declines, and 28.3% (52 institutions) reported level enrollments.
- Of the responding Research/Doctoral institutions, 72.8% (134 responding institutions) reported increases, 9.8% (18 institutions) reported declines, and 17.4% (32 institutions) reported level enrollments. Last year, 54.6% (118 responding institutions) reported increases, 19.4% (42 institutions) reported declines, and 26% (56 institutions) reported level enrollments.



Figure 3a: Total International Student Enrollments, Fall 2012 compared to Fall 2011.

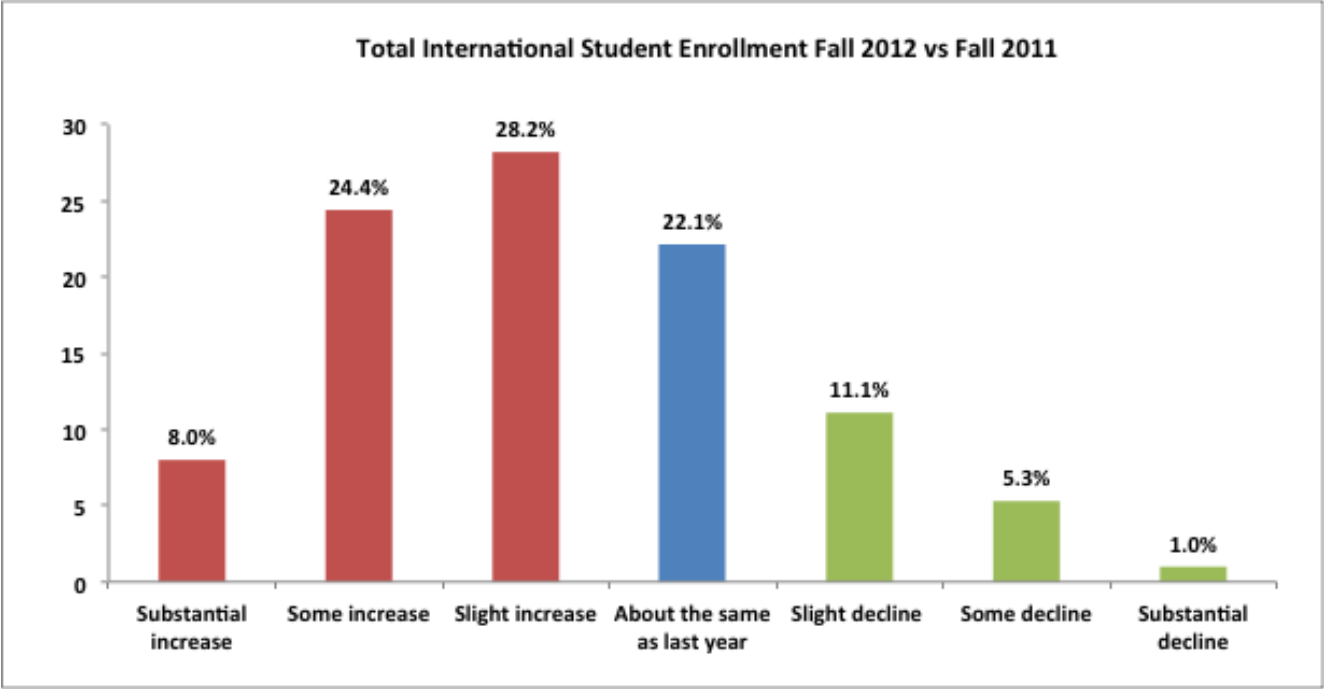


Figure 3b: Total international student enrollments at institutions with more than 1,000 international students, Fall 2012 vs. Fall 2011.

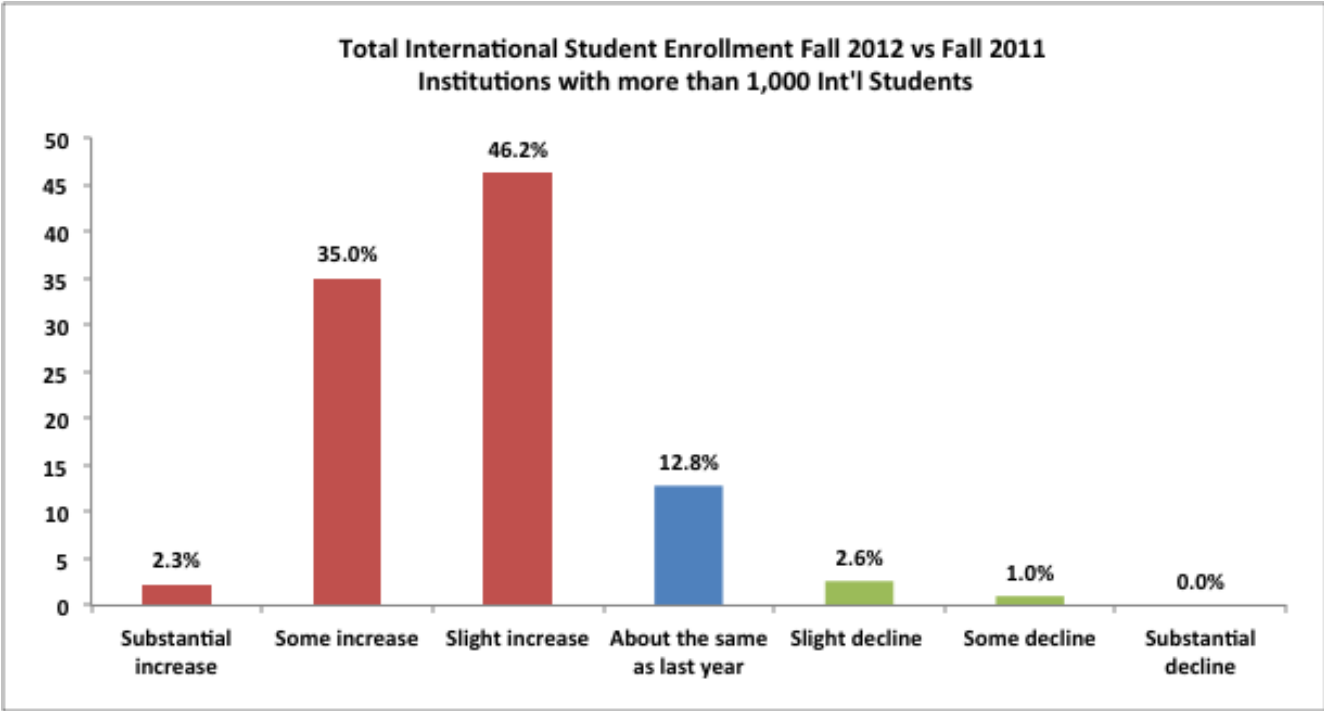


Figure 3c: Two-Year Colleges: Total international student enrollments at two-year colleges, Fall 2012 vs. Fall 2011.

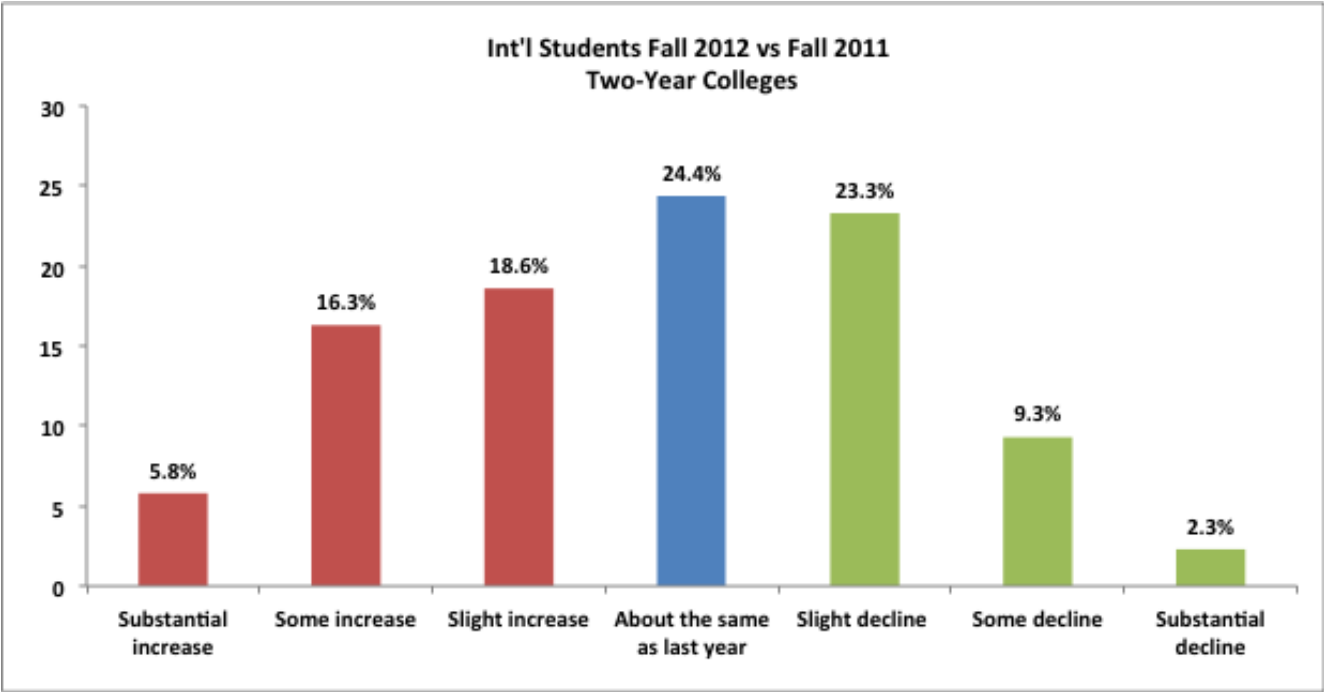
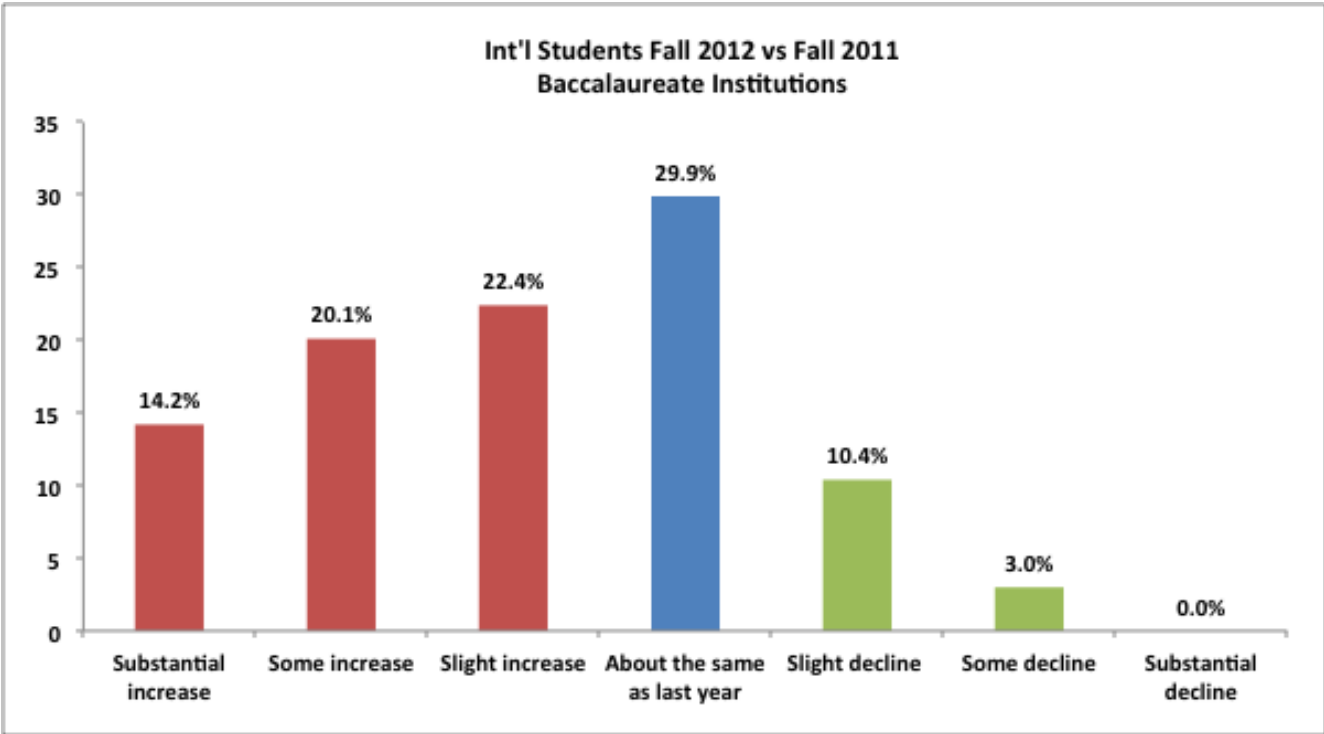
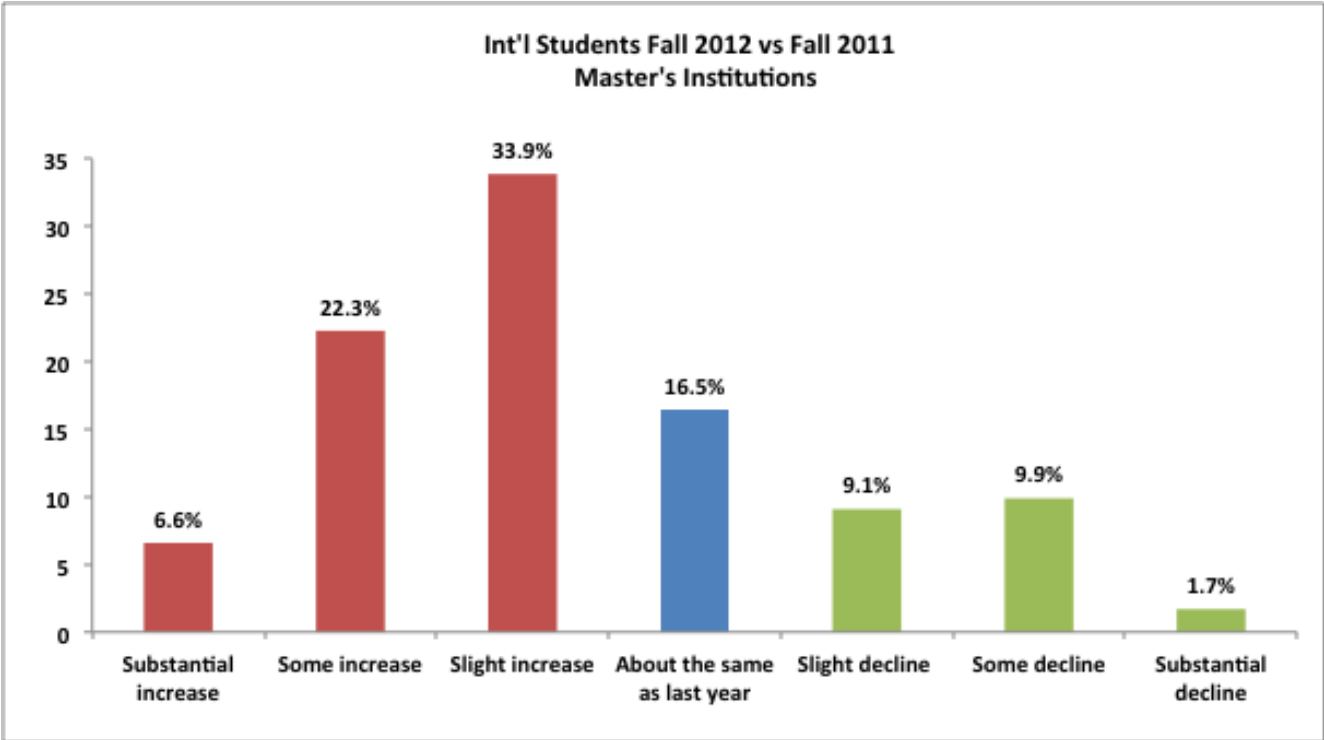


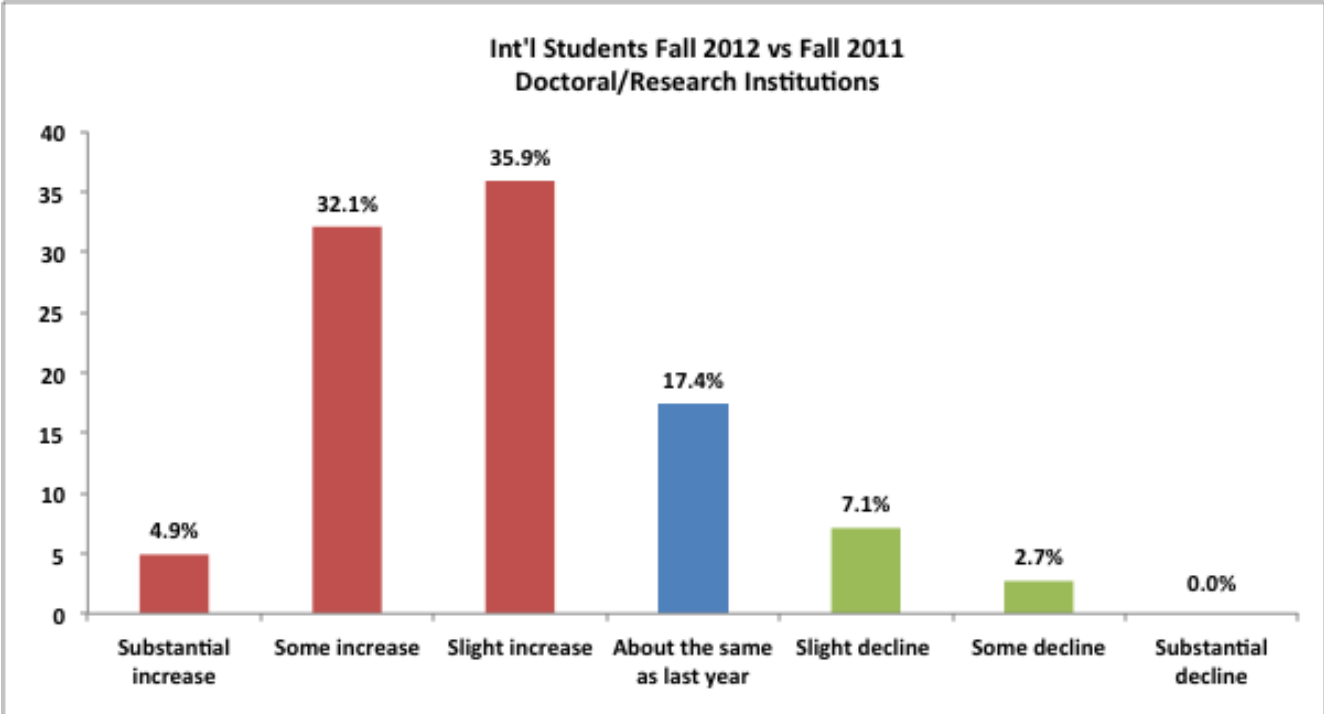
Figure 3d: Baccalaureate Institutions: Total international student enrollments at Baccalaureate institutions, Fall 2012 vs. Fall 2011.



**Figure 3e: Master's Institutions: Total international student enrollments at Master's institutions, Fall 2012 vs. Fall 2011.**



**Figure 3f: Doctoral/Research Institutions: Total international student enrollments at Doctoral/Research institution, Fall 2012 vs. Fall 2011.**



## **COUNTRY BREAKDOWN:** **NEW INTERNATIONAL STUDENT ENROLLMENTS**

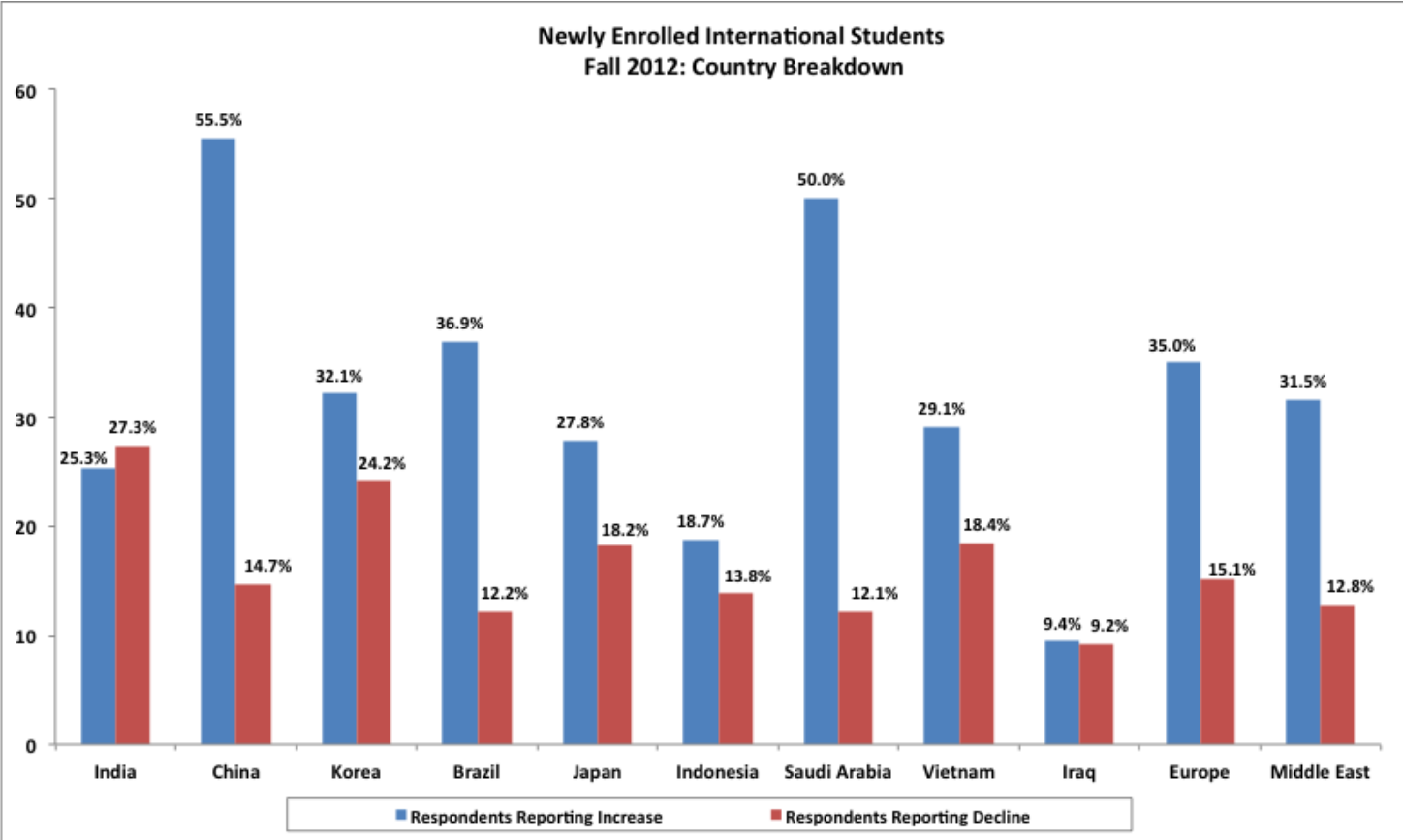
*What change, if any, have you noticed for Fall 2012 compared to Fall 2011 in the number of newly enrolled international students from the following places of origin?*

- For many countries, more responding institutions reported an increase than a decline:<sup>3</sup>
  - China (55.5% reporting increases vs. 14.7% reporting declines, and the rest reporting level enrollments)
  - Saudi Arabia (50% reporting increases vs. 12.1 % reporting declines)
  - Indonesia (18.7% reporting increases, 13.8% reporting declines)
  - Brazil (36.9% reporting increases, 12.2% reporting declines)
  - Korea (32.1% reporting increases, 24.2% reporting declines)
  - Vietnam (29.1% reporting increase, 18.4% reporting declines)
  - Japan (27.8% reporting an increase vs. 18.2% reporting a decline), indicating a possible slowing in the rate of decline seen over the past decade.
- For India, numbers seem to be continuing to decline slightly, with 27.6% of responding institutions reporting a decline and 25.3% reporting an increase.
- For Middle East as a region, 31.5% of respondents reported an increase and 12.8% 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 (although the vast majority of respondents reported level enrollments for Iraq).*
- For Europe as a region, 35% of respondents reported an increase (a slight increase from Fall 2011) and 15.1% reported a decline. *For the purposes of this survey, Turkey and Cyprus were included in Europe.*

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<sup>3</sup> 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 2012 compared to Fall 2011.**



## **SPECIAL STEPS TO ENSURE INTERNATIONAL ENROLLMENTS**

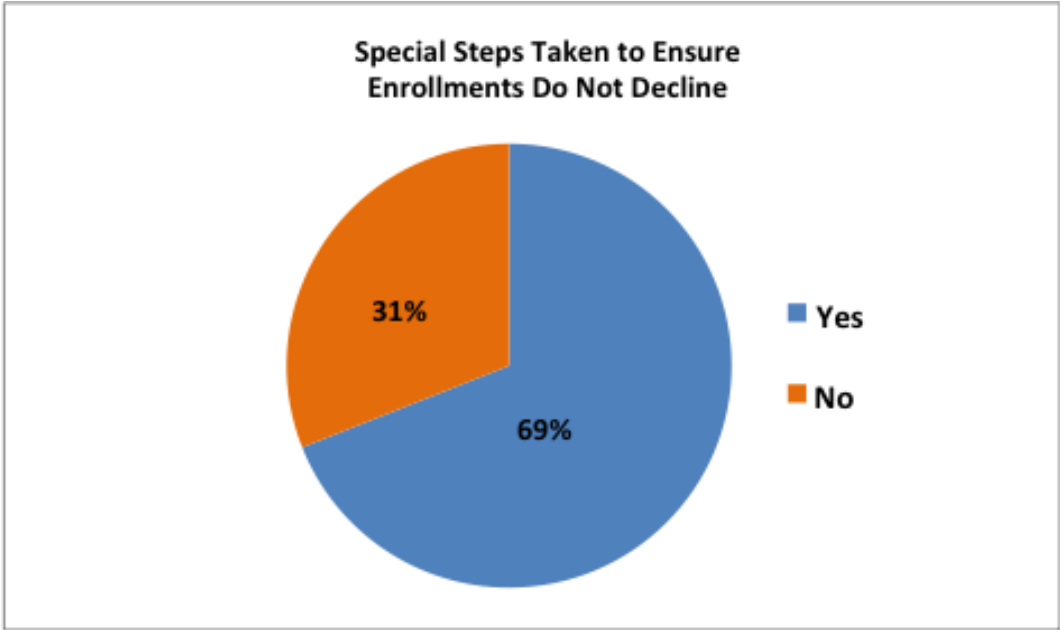
### **DO NOT DECLINE**

*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?*

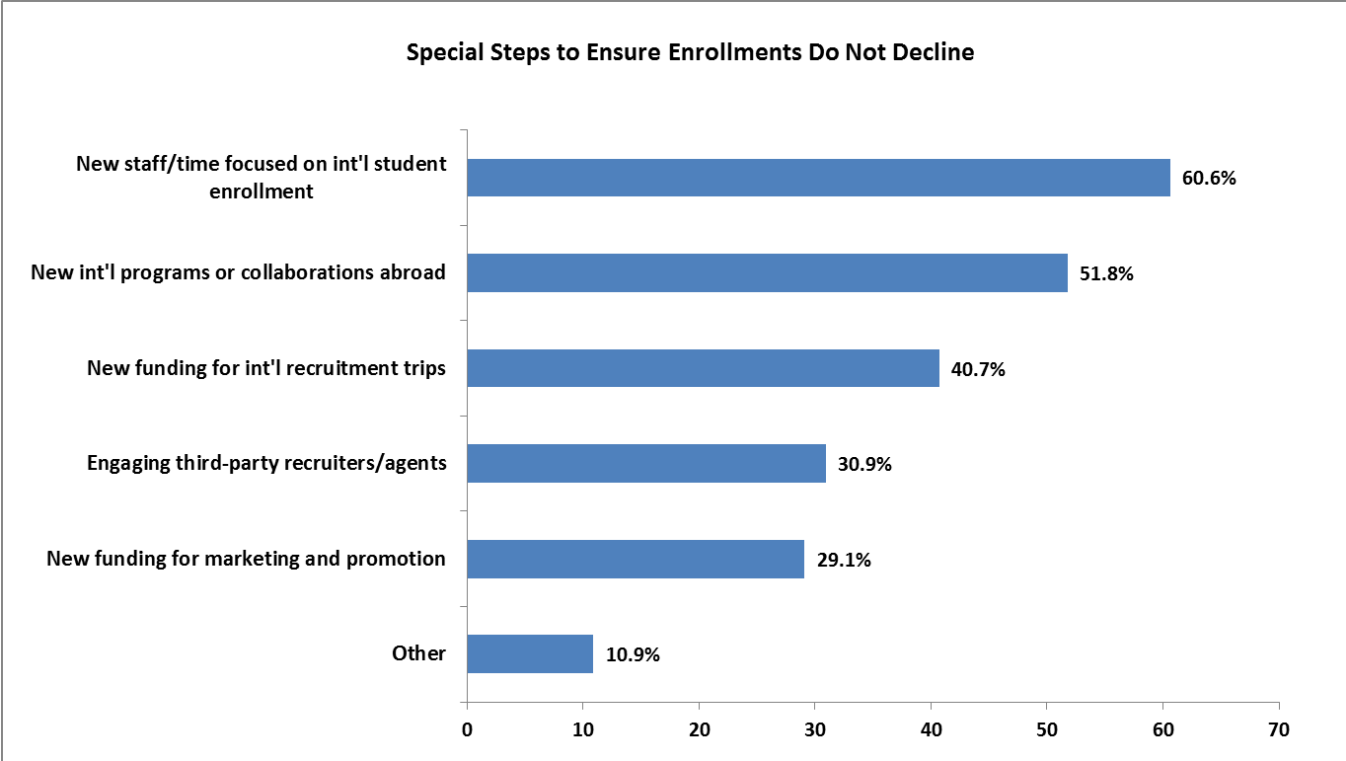
- According to the survey findings, 69% (388) of all responding institutions have taken special steps to ensure that the number of international students on their campuses does not decline, while 31% (174) have not taken any special steps.
- Of those who responded special steps were taken, the majority cited hiring new staff or allocating additional staff time to international enrollment (60.6% of respondents), while others pursued new international programs or collaborations abroad (51.8%) or sought new funding for international recruitment trips (40.7%). Respondents also engaged third-party recruiters or agents (30.9%) and sought out new funding for marketing and promotion of academic programs (29.1%). Other steps included hosting on-campus events or short-term institutes and creating linkages with specific entities (e.g. high schools, embassies and consulates, athletic divisions), upgrading their web and social media presence, and offering scholarships or better financial support systems.
- The institutions that did not take special steps said that international student enrollment at their institution was stable or growing (49.0% of respondents), there was a lack of funding or resources (46.2%), or they had continued their existing policies for international student recruitment (38.1%). Other respondents cited a lack of institutional commitment to international education (20.4% of respondents), or that other aspects of international education were considered higher priority on campus (9.5%).
- Institutions that have devoted more resources for international student recruitment trips seem to have concentrated mainly on Asia. Out of the 339 respondents to that question, the majority of institutions said they had devoted resources to recruiting international students from China (69.6%), followed by Southeast Asia (45.4%). Recruitment efforts were also strong for students from India (38.6%), Brazil (37.2), and other countries in Latin America (32.2%). Institutions also devoted more resources to recruitment trips to Korea (29.2%), the Middle East (26.5%), Europe (20.9%), and Japan (16.2%). In written responses, many institutions indicated also recruiting students in Nepal, Hong Kong and Canada.

**Figure 5a: Special Steps**

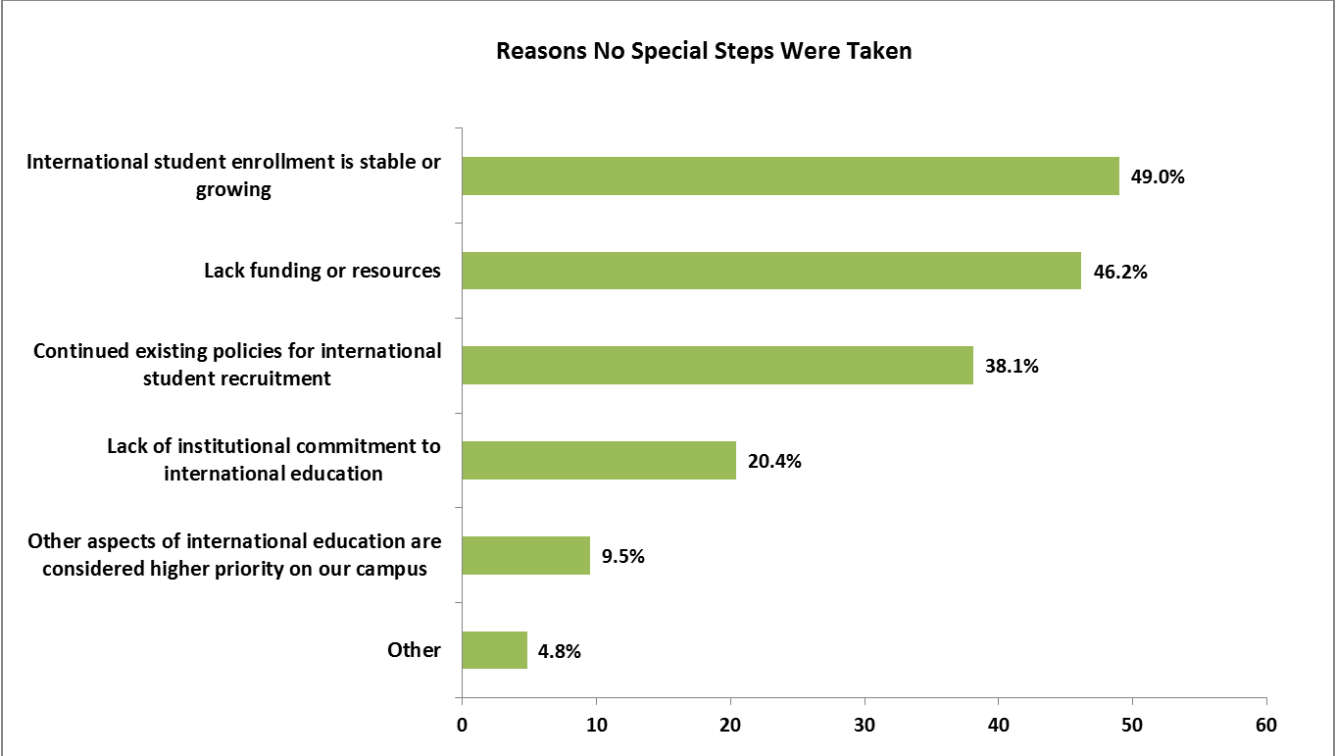
**Institutions taking special steps to ensure numbers of international students do not decline**



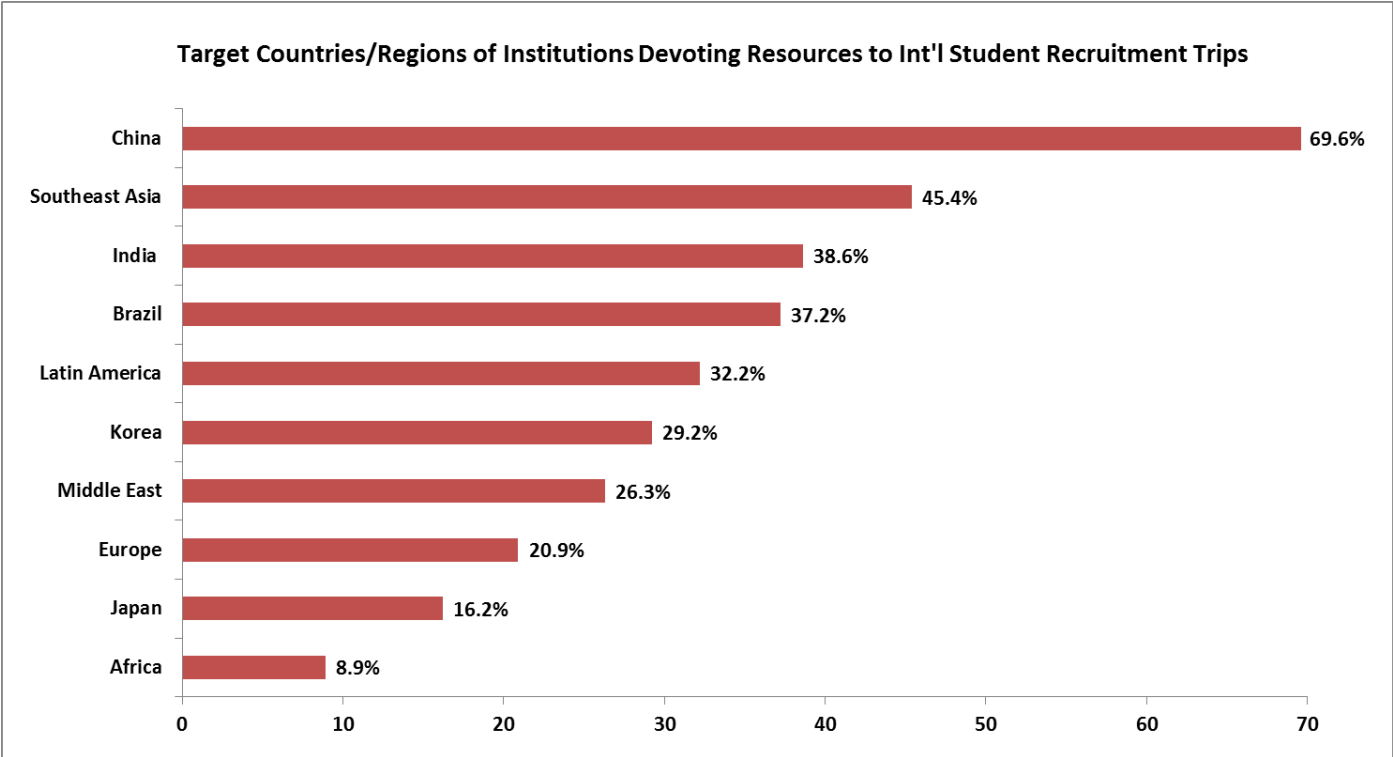
**Figure 5b: Which steps were taken?**



**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?**



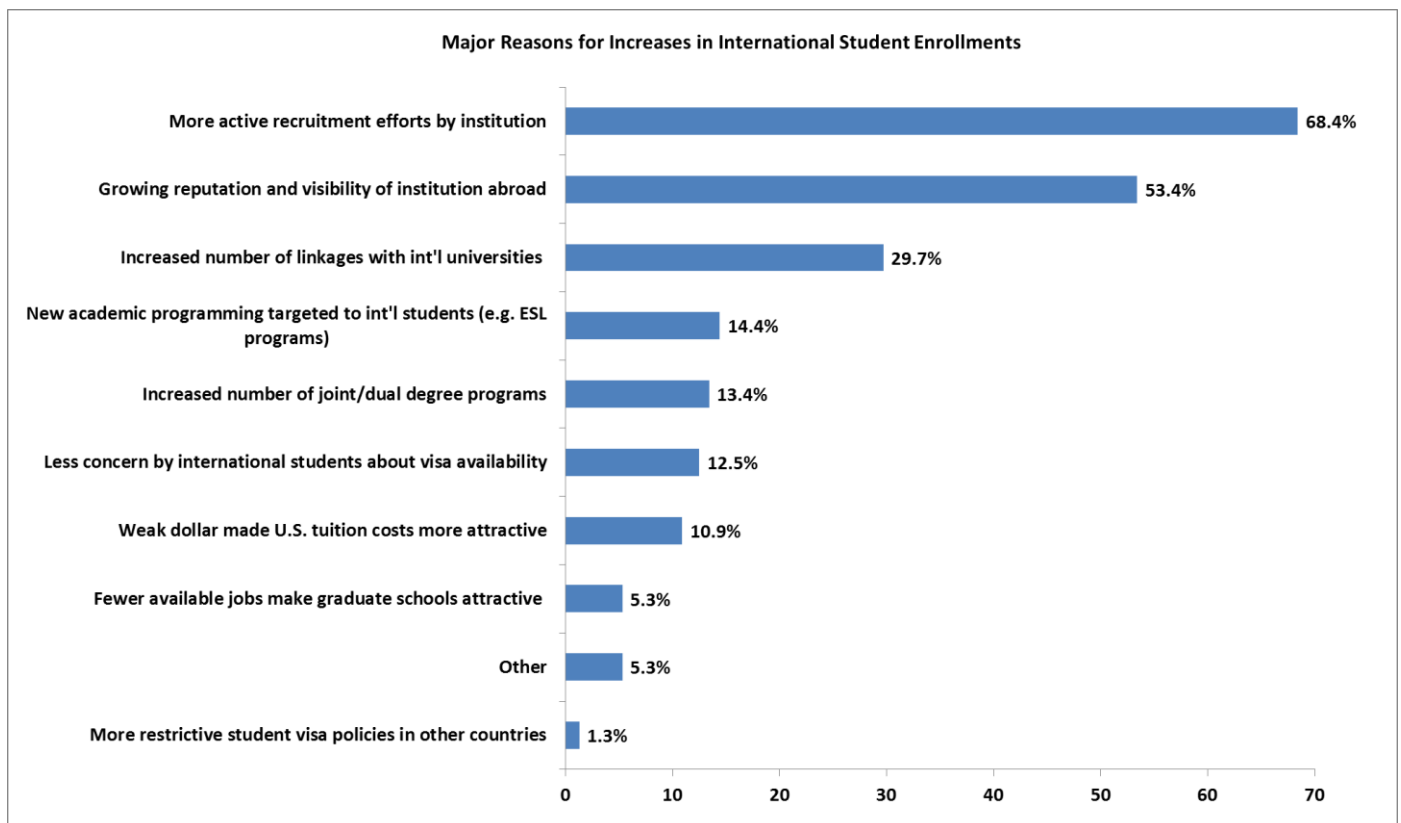


## MAJOR REASONS FOR REPORTED DECLINES/INCREASES IN NEW ENROLLMENTS

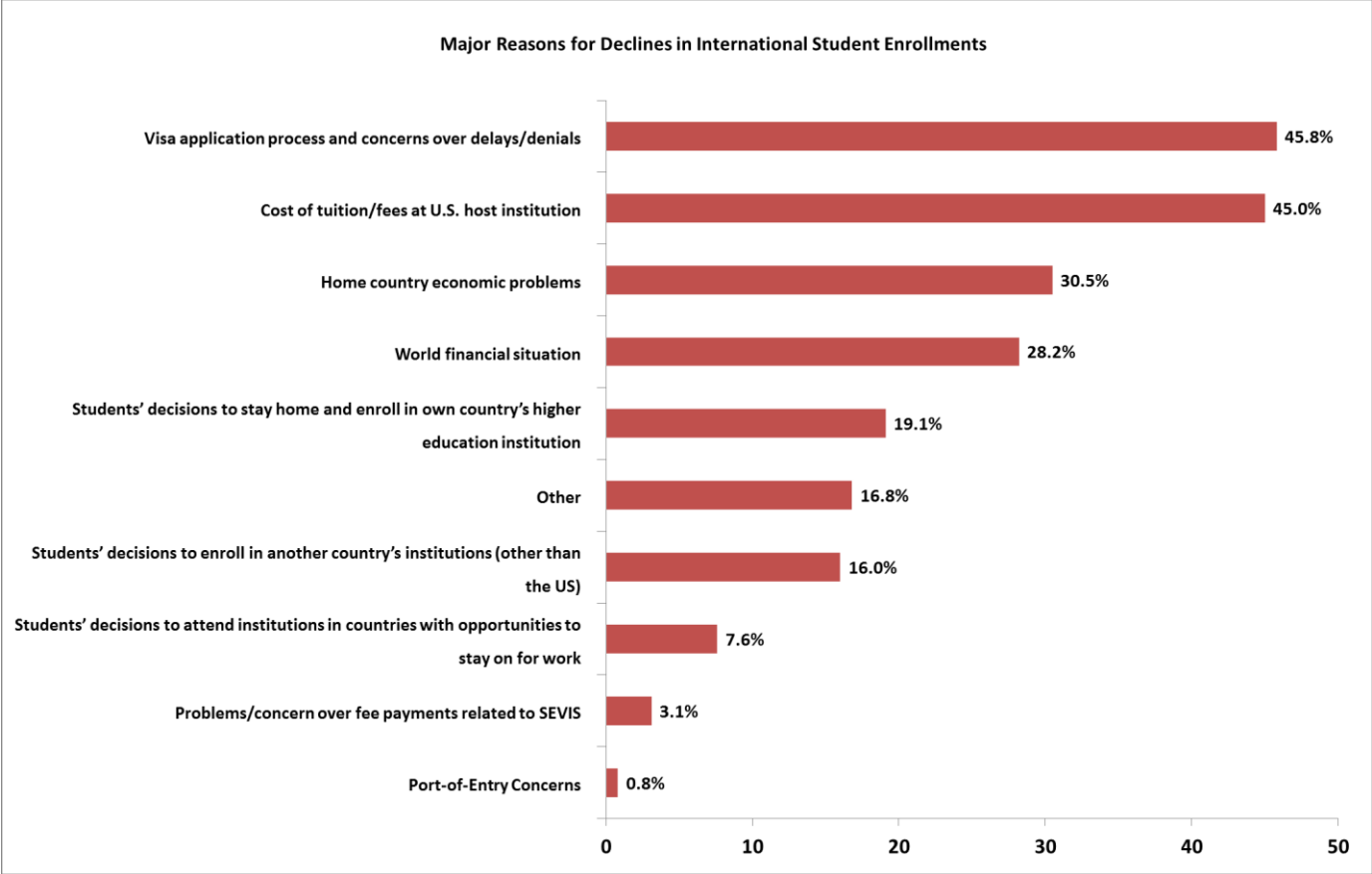
*Based on feedback from international applicants, what do you believe are the major reasons for the decline or increase in enrollments?*

- Of the institutions reporting increases in international student enrollments, 68.4% (320 responding institutions) indicated that more active recruitment efforts at their institution was a major reason for increase, followed by the growing visibility of their institution abroad (53.4%), and an increased number of linkages with international universities (29.7%). Other reasons cited were changes in course offerings, increase in the number of sponsored students, and better communications with students, parents and schools in key countries.
- Almost 46% percent of the responding institutions experiencing declines in international student enrollments cited the visa application process and concerns over denials and delays as the major reason for the decline, followed by the cost of tuition and fees at U.S. institutions (45.0%) and home country economic problems (30.5%), as well as the world financial situation (28.2%). Of the 16.8% who chose “other” as their response, several indicated a growing lack of capacity for students and possible restraints imposed by new language proficiency standards.

**Figure 6: Major Reasons for Reported Increases in Enrollments**



**Figure 7: Major Reasons for Reported Declines in Enrollments**



## **RESPONSE TO ENROLLMENTS FROM CHINA**

*Given recent concerns regarding the rapidly increasing numbers of student enrollments from China, institutions with more than 30% of students enrolled from this top sending place of origin were asked what impact this increase had on their campus.*

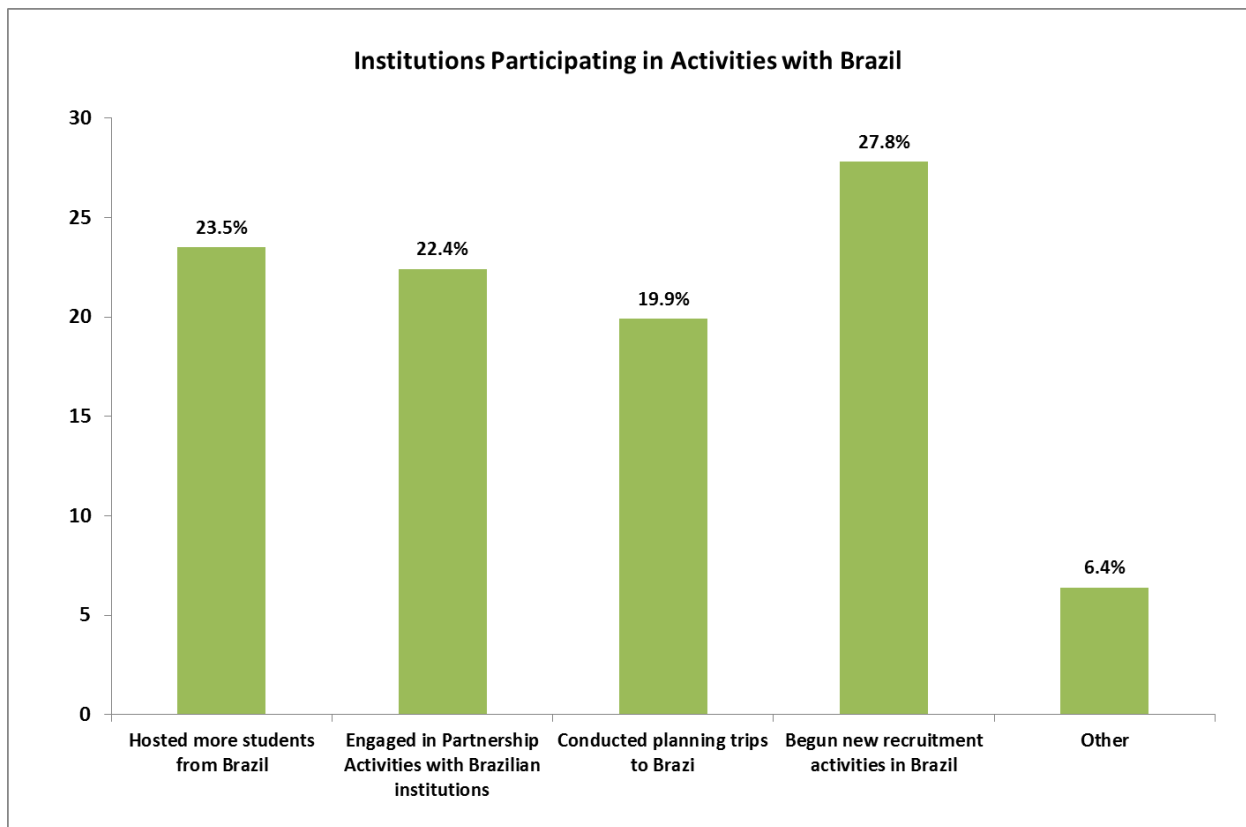
- The majority of respondents reported challenges related to integrating the growing number of Chinese students with their domestic student population and their community, and to English proficiency levels. A number of respondents noted that they are adding more ESL classes, increasing their level of student support services, and offering special workshops for tutoring and assisting Chinese students with academic, social and cultural issues. Other respondents pointed to the contributions and diverse range of skills and perspectives that Chinese students bring to their host campuses.

## **ENGAGEMENT WITH BRAZIL**

*Responding institutions were asked whether they had experienced more engagement with Brazil with the current emphasis from the Government of Brazil on educational exchange, and if so, what activities they had undertaken.*

- The majority of institutions who have seen closer engagement with Brazil this year indicated that they had begun new recruitment activities in Brazil (cited by 27.8% of respondents), hosted more students from Brazil (23.5%), engaged in partnership activities with Brazilian institutions (22.4%), and conducted planning trips to Brazil (19.9%). Many institutions specifically reported participating as host institutions in the Brazil Scientific Mobility Program.

**Figure 8: Institutional Engagement with Brazil**



## **RESPONSES TO INTERNATIONAL STUDENTS AFFECTED BY ARAB SPRING EVENTS**

*Respondents were asked whether they had students enrolled from Arab Spring-affected countries and, if they had been impacted, what, if anything, had their institution done to support these students (for example, provision of tuition waivers, loans, housing, meal plans, or other forms of support).*

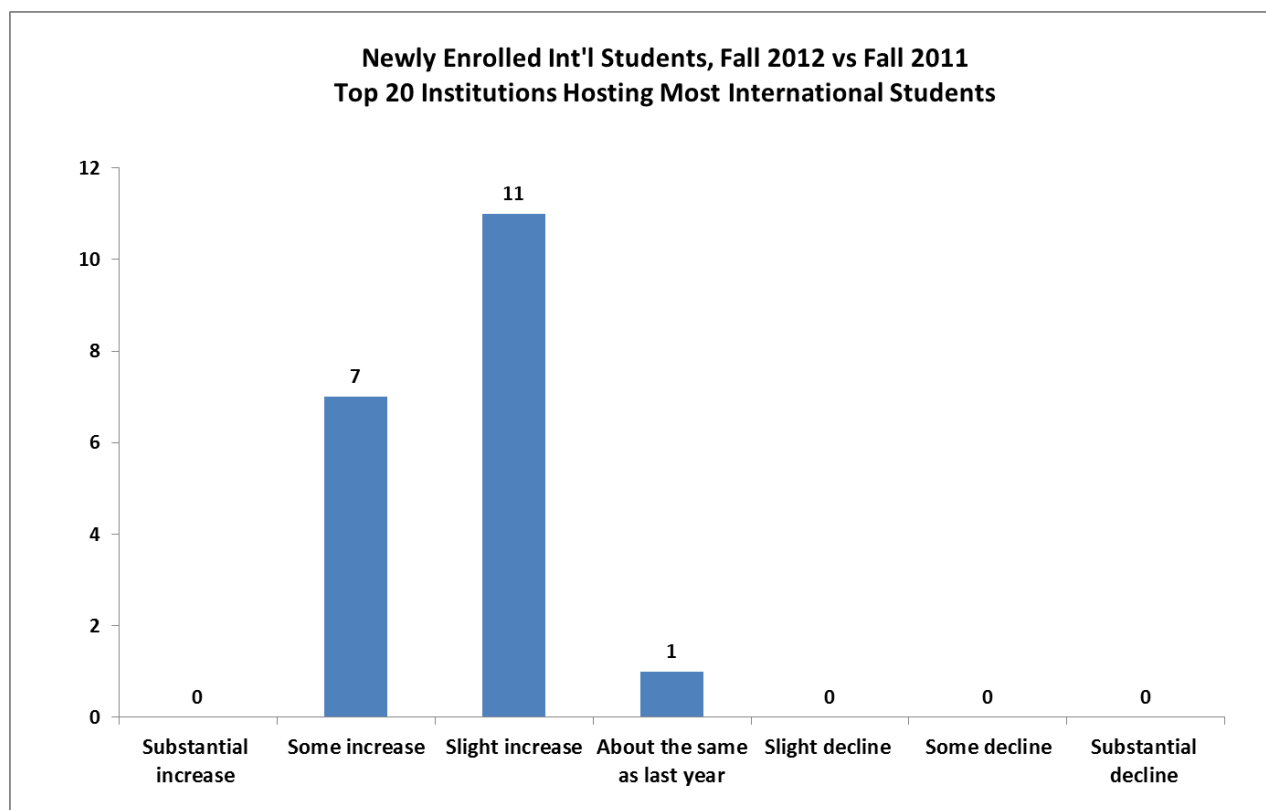
- The majority of institutions indicated that they provided direct financial assistance, such as scholarships, tuition waivers or discounts, made short-term loans or provided assistantships.
- If institutions were unable to provide direct financial assistance, many indicated that they offered flexibility with all billing and registration processes and deadlines or waived all late fees on tuition and campus fee bills; provided short-term free or reduced-rate housing to students (and their families) who had graduated and could not return home or who had temporarily lost their government support; provided meal tickets or supplies; assisted with international telephone calls to families of affected students; provided on-campus employment opportunities; or assisted students with applying for economic hardship work authorization through the U.S. Citizenship and Immigration Services.
- Other institutions assisted affected students with outreach and support, personal and group counseling, access to mental and physical health services, more academic advising, and extra documentation for student visa renewals.

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

All of the top 20 host institutions<sup>4</sup> responded to this survey.

- Eighteen of the responding institutions that host the highest numbers of international students reported increases in the number of newly enrolled international students on their campuses this year and one institution reported no change. No institution reported declines. One institution did not provide a response to this question.
- Looking at overall international student enrollments, 17 respondent institutions reported an increase, two institutions reported level enrollments, and one institution did not respond to the question.

**Figure 9a: Newly enrolled international students at the Top 20 institutions that enroll the highest numbers of international students, Fall 2012 compared to Fall 2011.**



<sup>4</sup> The top 20 host institutions (according to *Open Doors 2011 Report on International Educational Exchange*) refer to the 20 institutions nationally that host the largest numbers of international students on their campuses.

**Figure 11b: Overall international student enrollments at the Top 20 institutions that enroll the highest numbers of international students, Fall 2012 compared to Fall 2011.**

