

FALL 2008 INTERNATIONAL STUDENT ENROLLMENT SURVEY

November 2008

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:

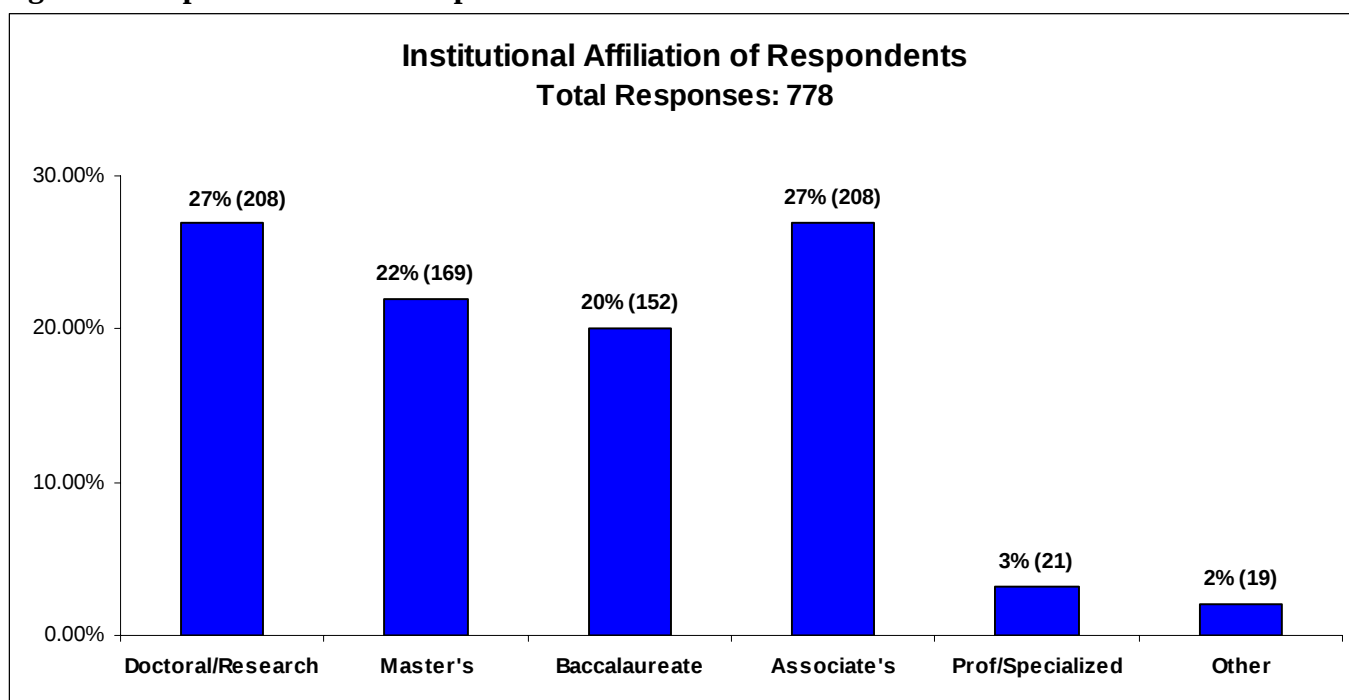
- American Association of Community Colleges (AACC)
- American Association of State Colleges and Universities (AASCU)
- American Council on Education (ACE)
- Association of American Universities (AAU)
- Council of Graduate Schools (CGS)
- Institute of International Education (IIE)
- NAFSA: Association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

The survey was conducted between October 6 and 24, 2008.

RESPONDENTS

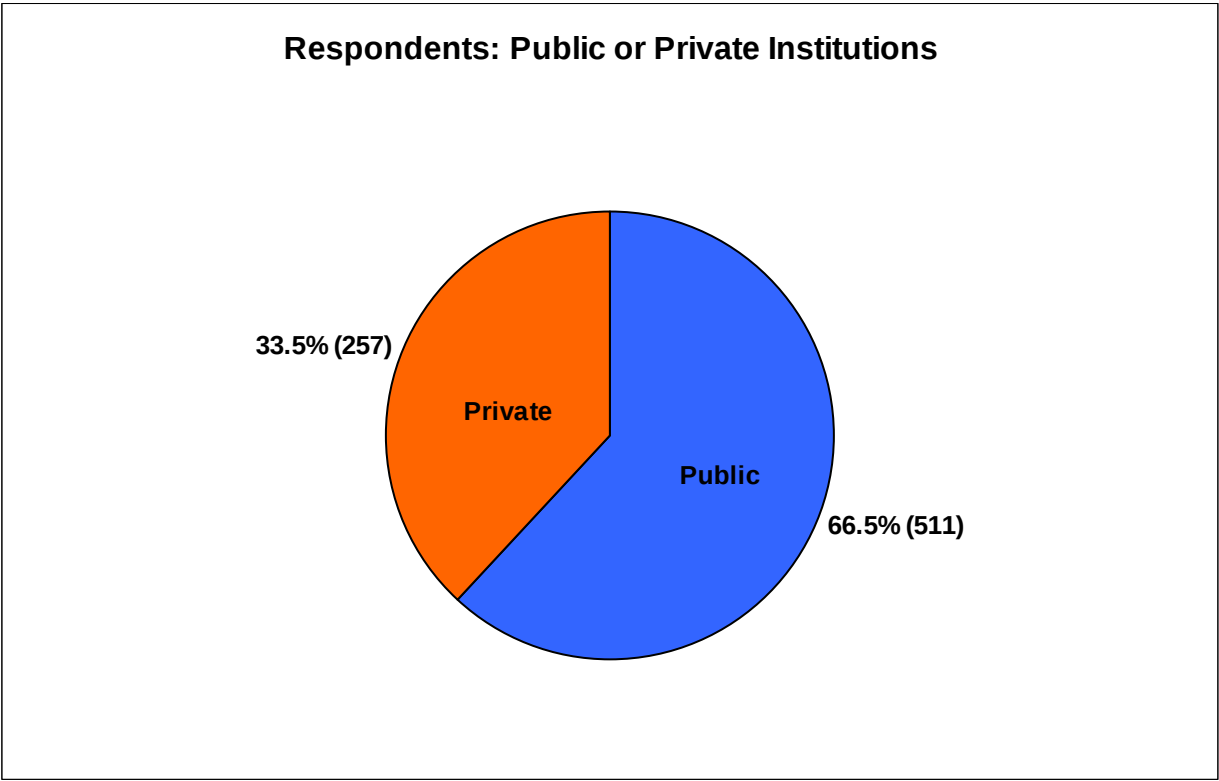
- The survey received responses from 778 U.S. higher education institutions from all institutional types. Twenty-seven percent (208) of the respondents were associate institutions, 27% (208) were doctoral/research institutions, 22% (169) were Master's institutions, 17% (152) were Baccalaureate institutions, 3% (21) were Specialized institutions, and 2% (19) represented other types of institutions.
- 66.5% (511) were public institutions and 33.5% (257) were private institutions.

Figure 1: Respondents. Total Responses 778¹



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

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 2008) compared to Fall 2007?

- Of all responding institutions, 56% (or 432 respondents) reported an increase, 19% (145) reported a decline, and 25% (191) reported level enrollments. Last year, 55% reported an increase, 19% a decline, and 26% level enrollments.
- Of the responding institutions that enroll more than 1,000 international students (98 institutions that responded to this question), 78% (76 responding institutions) reported increases, 8% (8 institutions) reported declines, and 14% (14 institutions) reported level enrollments. Last year, 79% reported increases, 9% reported declines, and 12% reported level enrollments.
- Of the responding two-year colleges, 50.5% (103 responding institutions) reported increases, 20.6% (42 institutions) reported declines, and 28.9% (59 institutions) reported level enrollments. Last year, 47% reported increases, 18% reported declines, and 35% reported level enrollments.
- Of the responding Research/Doctoral institutions, 67% (136 responding institutions) reported increases, 13% (27 institutions) reported declines, and 20% (40 institutions) reported level enrollments. Last year, 67% reported increases, 13% reported declines, and 20% reported level enrollments.
- Of the responding Baccalaureate institutions, 48% (73 responding institutions) reported increases, 21% (32 institutions) reported declines, and 31% (47 institutions) reported level enrollments. Last year, 45% reported increases, 26% reported declines, and 30% reported level enrollments.
- Of the responding Master's institutions, 57% (96 responding institutions) reported increases, 22% (37 institutions) reported declines, and 21% (35 institutions) reported level enrollments. Last year, 59% reported increases, 22% reported declines, and 19% reported level enrollments.

Figure 2a: Newly enrolled international students, Fall 2008 compared to Fall 2007.

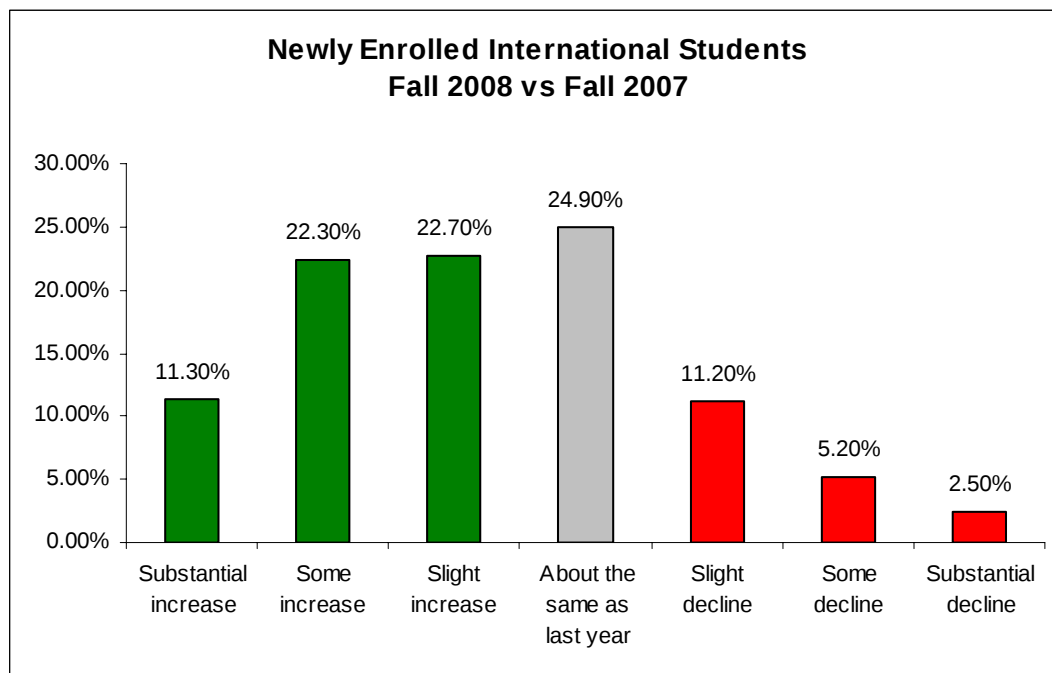


Figure 2b: Newly enrolled international students at institutions enrolling more than 1,000 international students, Fall 2008 compared to Fall 2007.

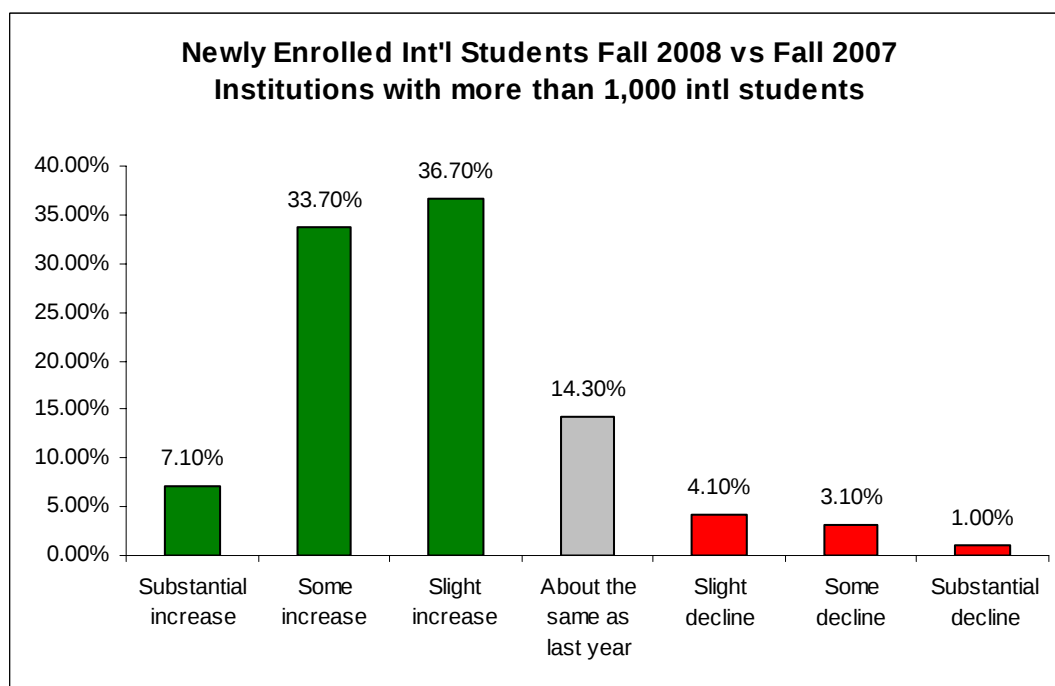


Table 2c: Two-Year Colleges:

Newly enrolled international students at institutions at two-year colleges, Fall 2008 compared to Fall 2007.

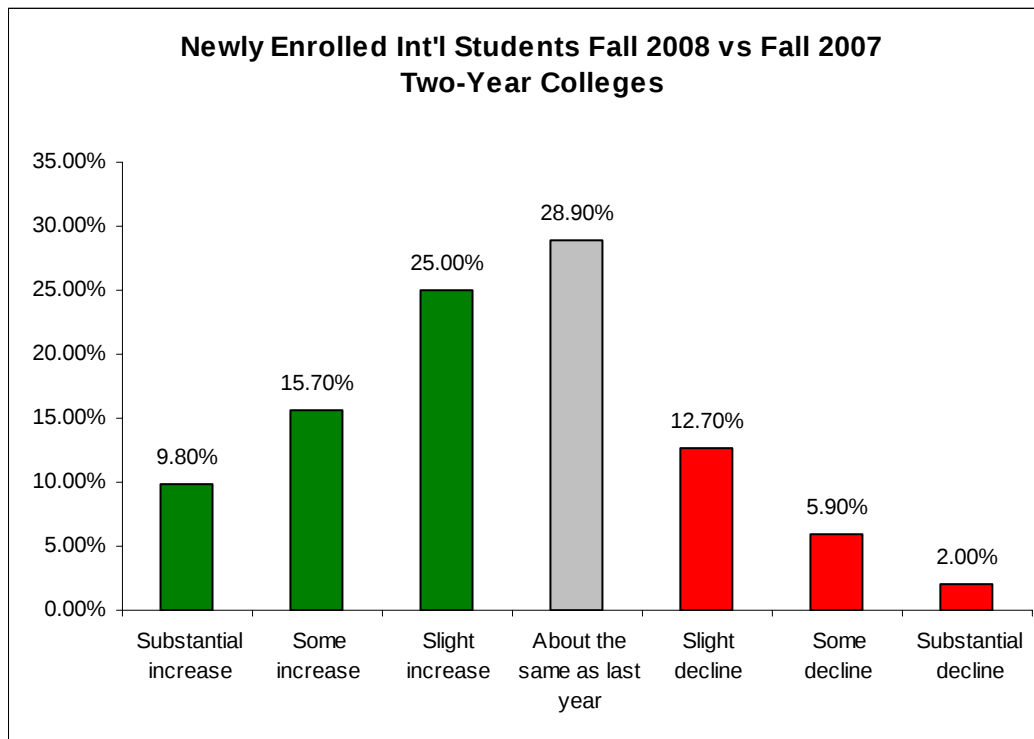


Figure 2d: Doctoral/Research Institutions:

Newly enrolled international students at institutions at Doctoral/Research institutions, Fall 2008 compared to Fall 2007.

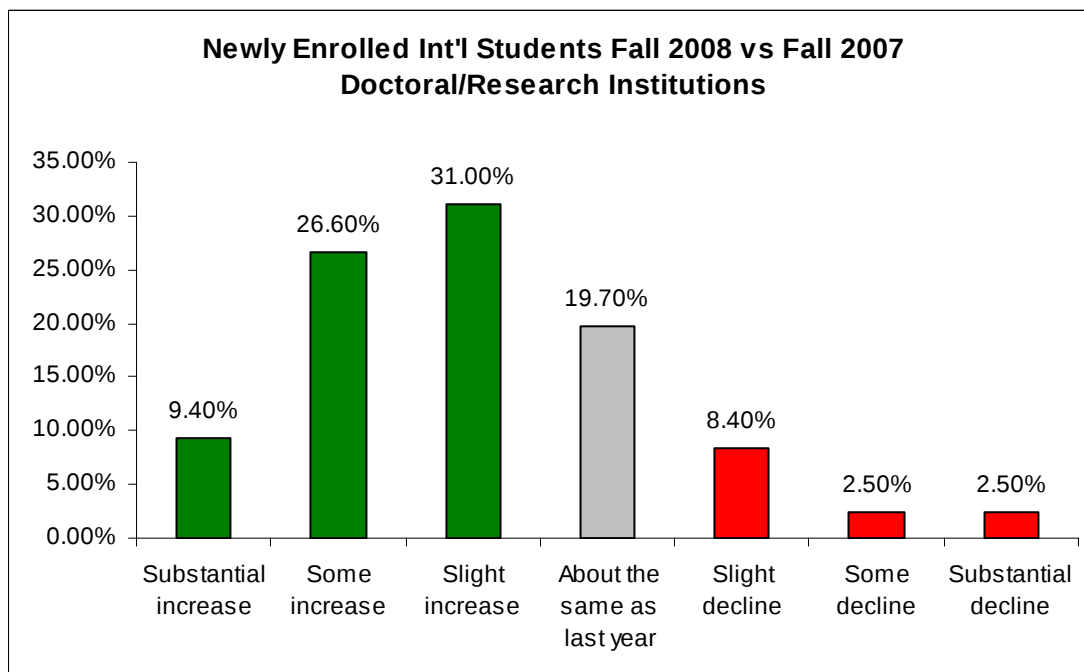


Figure 2e: Baccalaureate Institutions:
Newly enrolled international students at institutions at Baccalaureate Institutions, Fall 2008 compared to Fall 2007.

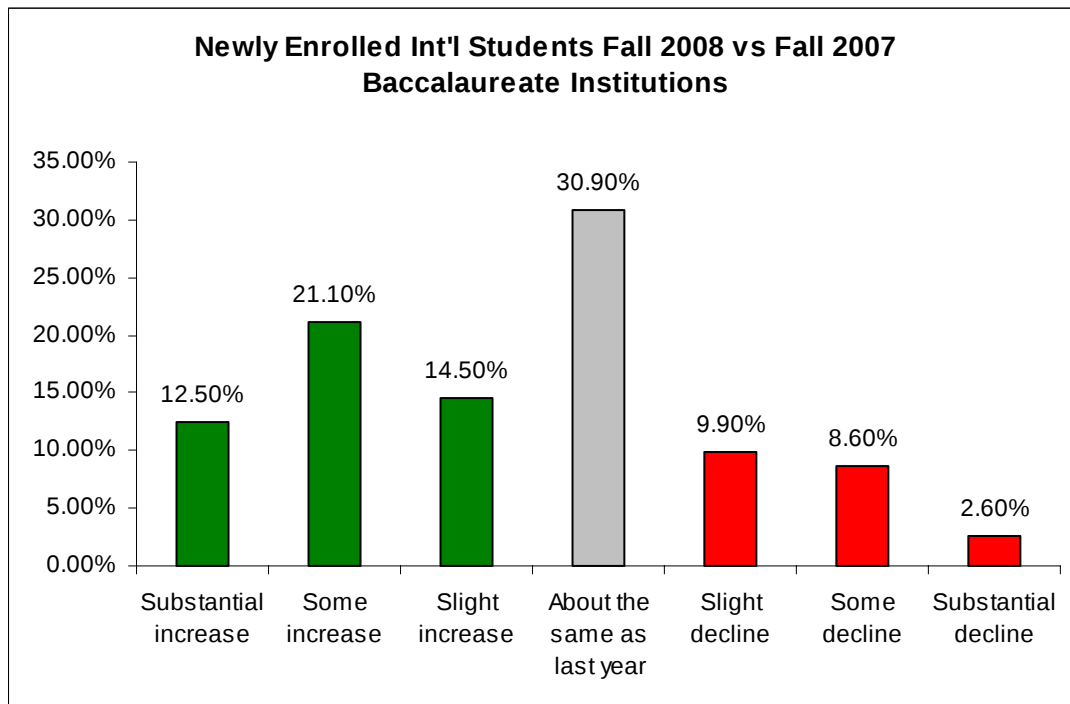
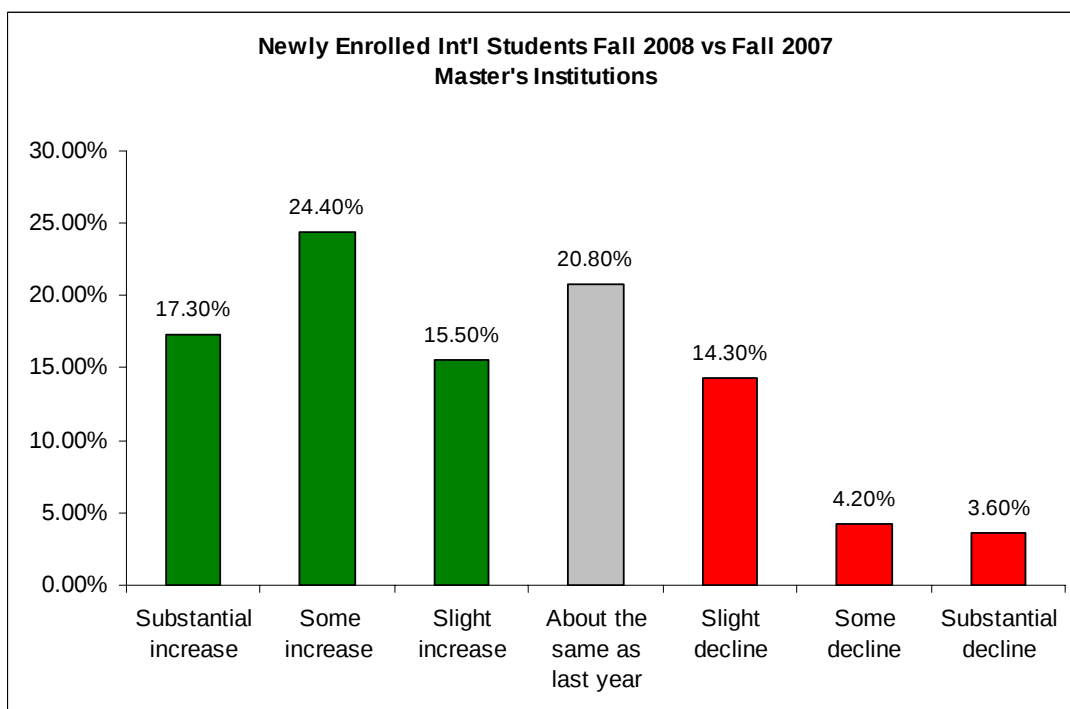


Figure 2f: Master's Institutions:
Newly enrolled international students at institutions at Master's Institutions, Fall 2008 compared to Fall 2007.



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 2008), compared to Fall 2007?

- Of all responding institutions, 57% (434 respondents) reported an increase, 16% (123) reported a decline, and 27% (205) reported level enrollments. Last year, 57% reported an increase, 19% reported a decline, and 24% reported level enrollments.
- Of the responding institutions that enroll more than 1,000 international students (95 institutions), 75% (71 responding institutions) reported increases, 6% (6 institutions) reported declines, and 19% (18 institutions) reported level enrollments. Last year, 82.8% reported increases, 7.5% reported declines, and 9.7% reported level enrollments.
- Of the responding two-year colleges, 55% (114 responding institutions) reported increases, 15% (32 institutions) reported declines, and 30% (62 institutions) reported level enrollments. Last year, 55% reported increases, 17% reported declines, and 28% reported level enrollments.
- Of the responding Doctoral/Research institutions, 65.5% (133 institutions) reported increases, 10.9% (22 institutions) reported declines, and 23.6% (48 institutions) reported level enrollments. Last year, 54% reported increases, 21% reported declines, and 25% reported level enrollments.
- Of the responding Baccalaureate institutions, 53.4% (78 institutions) reported increases, 19.2% (28 institutions) reported declines, and 27.4% (40 institutions) reported level enrollments. Last year, 43% reported increases, 27% reported declines, and 30% reported level enrollments.
- Of the responding Master's institutions, 64% (90 institutions) reported increases, 20% (33 institutions) reported declines, and 26% (43 institutions) reported level enrollments. Last year, 60% reported increases, 22% reported declines, and 18% reported level enrollments.

Figure 3a: Total International Student Enrollments, Fall 2008 compared to Fall 2007.

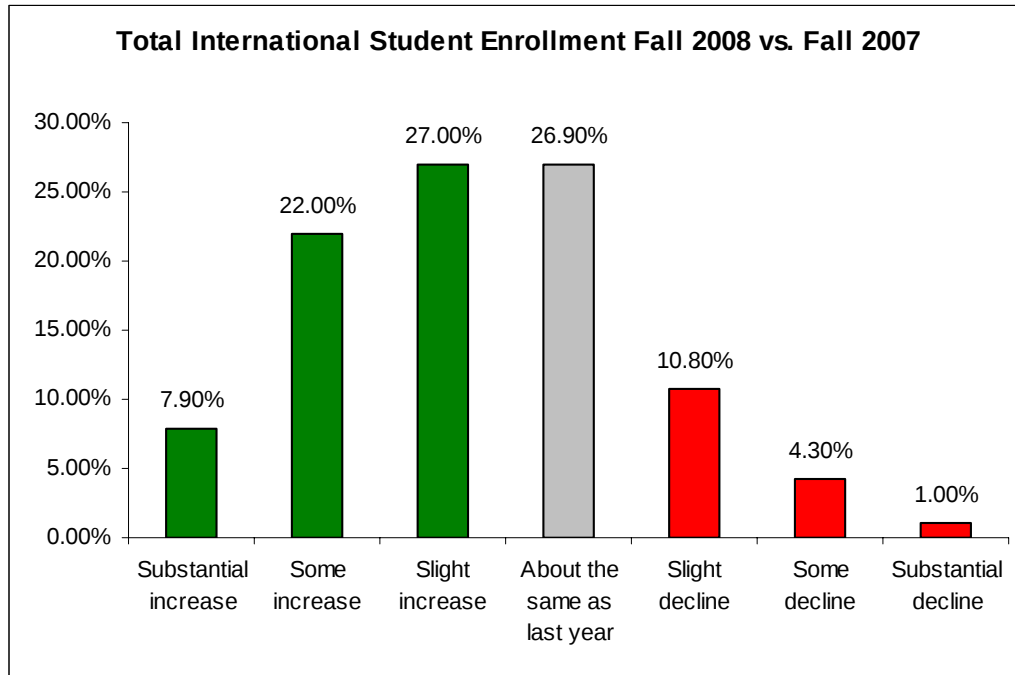


Figure 3b: Total international student enrollments at institutions with more than 1,000 international students, Fall 2008 vs. Fall 2007.

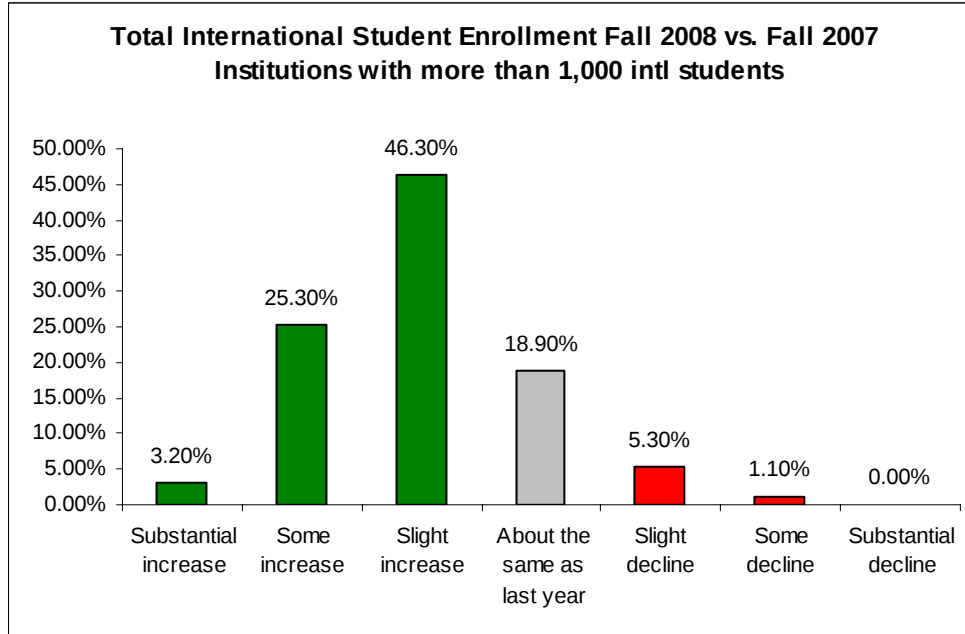


Figure 3c: Two-Year Colleges: Total international student enrollments at two-year colleges, Fall 2008 vs. Fall 2007.

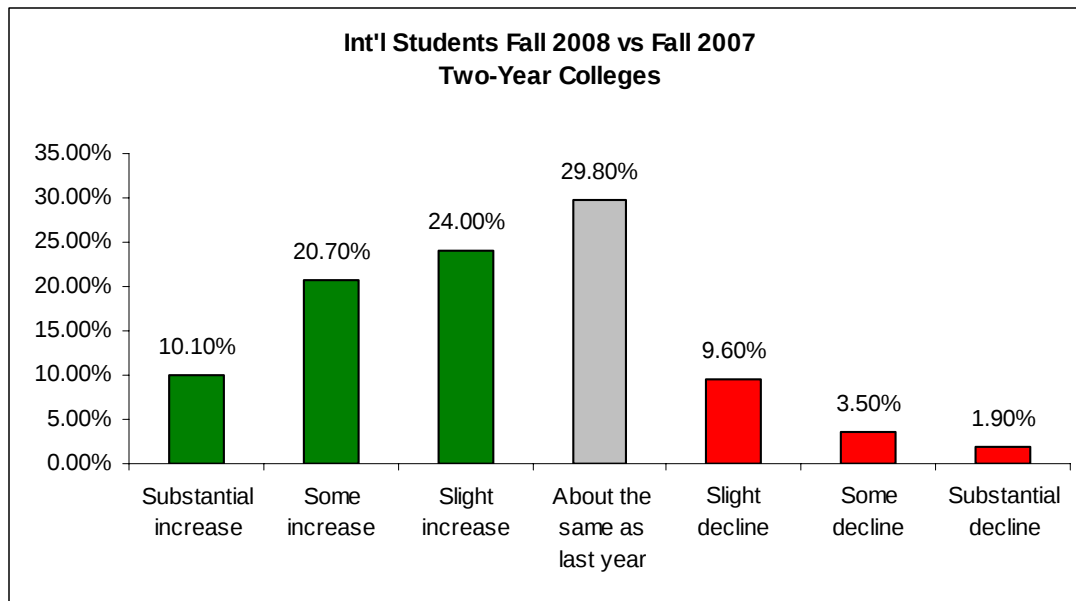


Figure 3d: Doctoral/Research Institutions: Total international student enrollments at Doctoral/Research institution, Fall 2008 vs. Fall 2007.

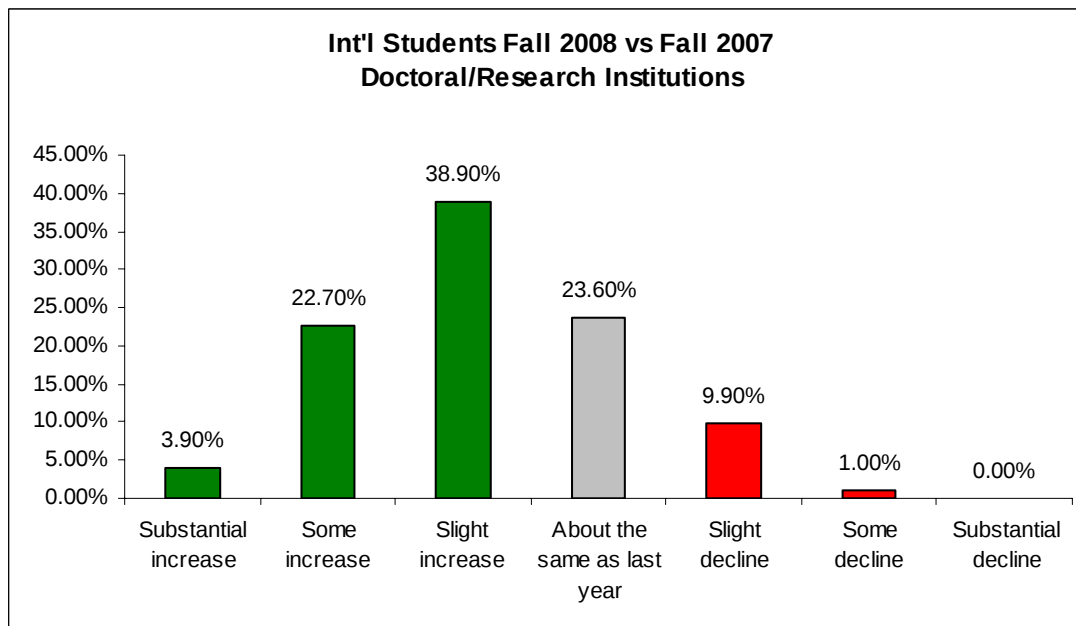


Figure 3e: Baccalaureate Institutions: Total international student enrollments at Baccalaureate institutions, Fall 2008 vs. Fall 2007.

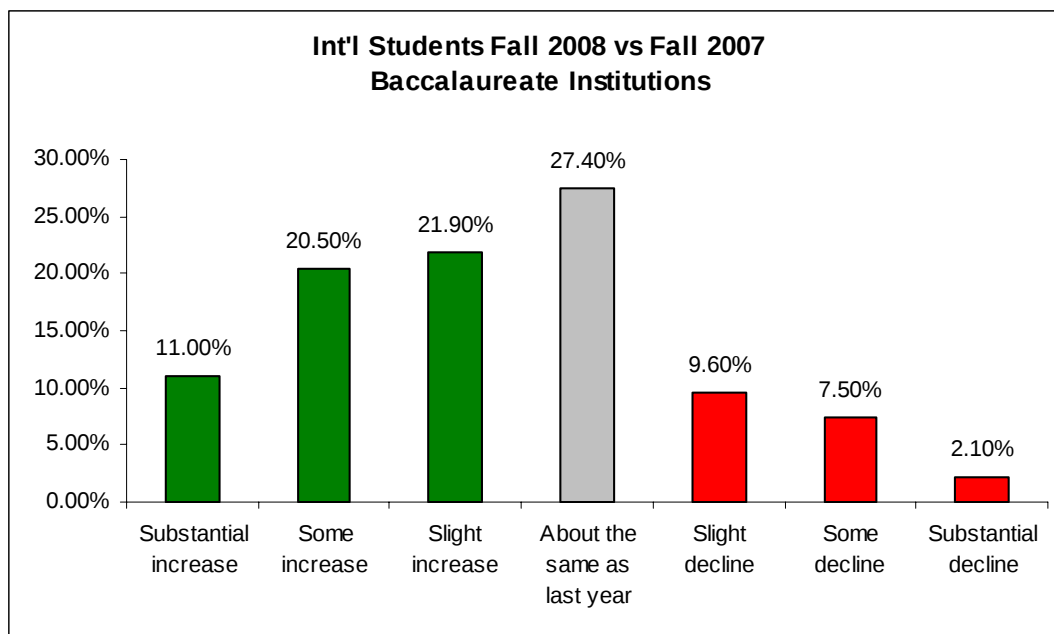
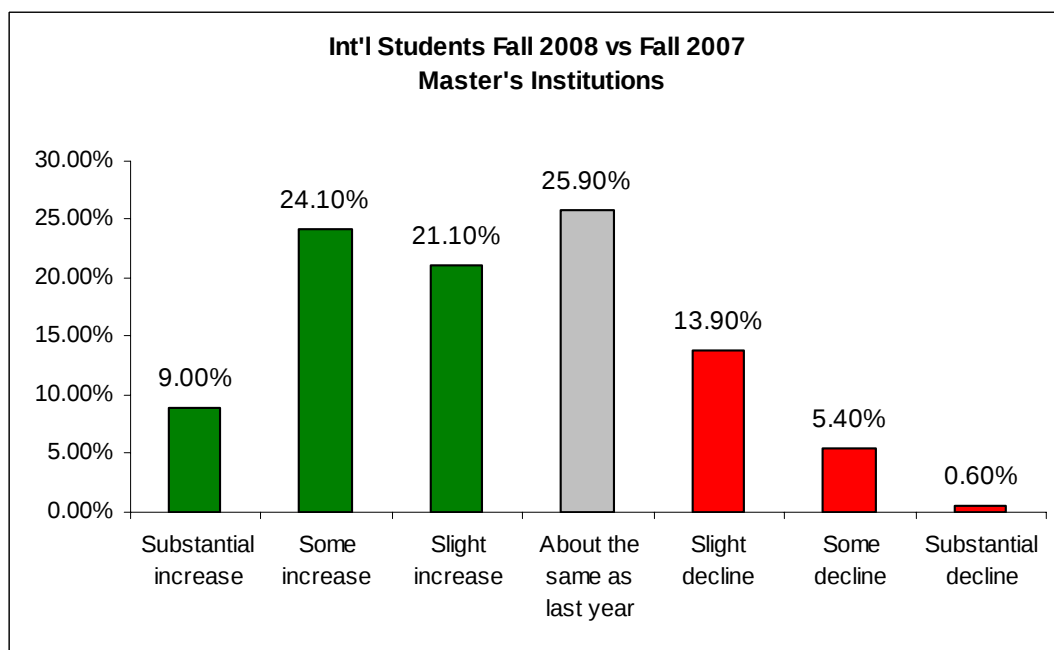


Figure 3f: Master's Institutions: Total international student enrollments at Master's institutions, Fall 2008 vs. Fall 2007.

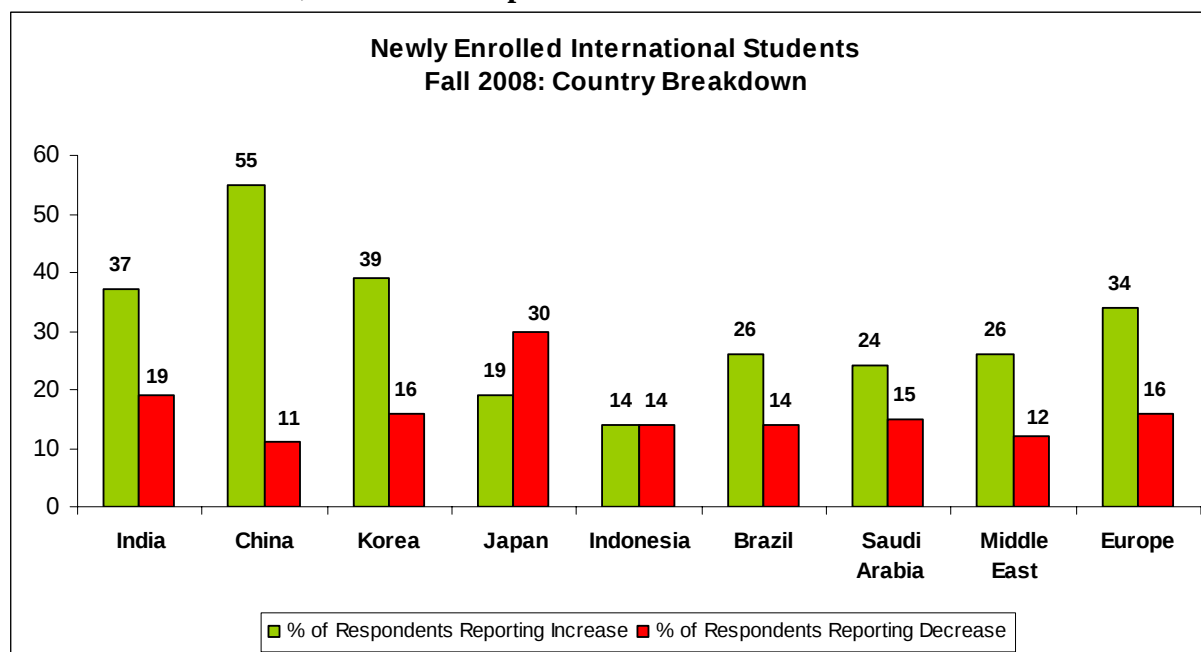


COUNTRY BREAKDOWN: **NEW INTERNATIONAL STUDENT ENROLLMENTS**

What change, if any, have you noticed for Fall 2008 compared to Fall 2007 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 (55% reporting increases vs. 11% reporting declines, and the rest reporting level enrollments)
 - Korea (39% reporting increases vs. 16% reporting declines)
 - India (37% reporting increases vs. 19% reporting declines)
 - Saudi Arabia (24% reporting increases vs. 15% reporting declines)
 - Brazil (26% reporting increases vs. 14% reporting declines)
- For Middle East as a region, 26% of respondents reported an increase and 12% 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 16% 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 (30% reporting a decline vs. 19% reporting an increase)

Figure 4: Country Breakdown: Reported increases and declines in the number of newly enrolled international students, Fall 2008 compared to Fall 2007



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?

- Fifty-seven percent (438) of all responding institutions have taken special steps to ensure that the number of international students on their campuses does not decline, while 43% (333) 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 28%), followed by new funding for international recruitment trips (23%), and new funding for marketing and promotion of programs (21%).
- The institutions that did not take special steps mainly cited a lack of funding or resources (23%) and the fact that international student enrollments are stable or growing (16%).
- Institutions that have devoted more resources for international student recruitment trips seem to have concentrated mainly on Asia. Twenty-nine percent of responding institutions specifically devoted resources to recruit international students from China, followed by Korea (16%) and India (16%). An additional 17% 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 (4%). In written responses, many institutions indicated also recruiting students in Vietnam, Thailand, Canada, and the Caribbean.

Figure 5a: Special Steps

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

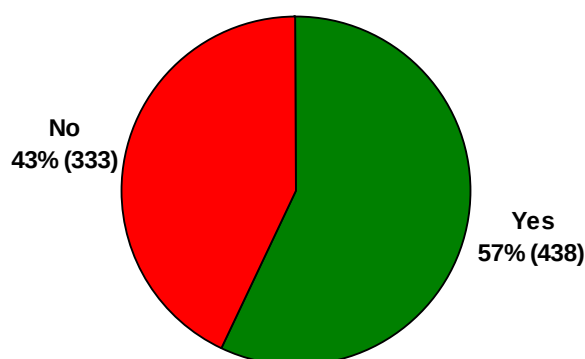


Figure 5b: Which steps were taken?

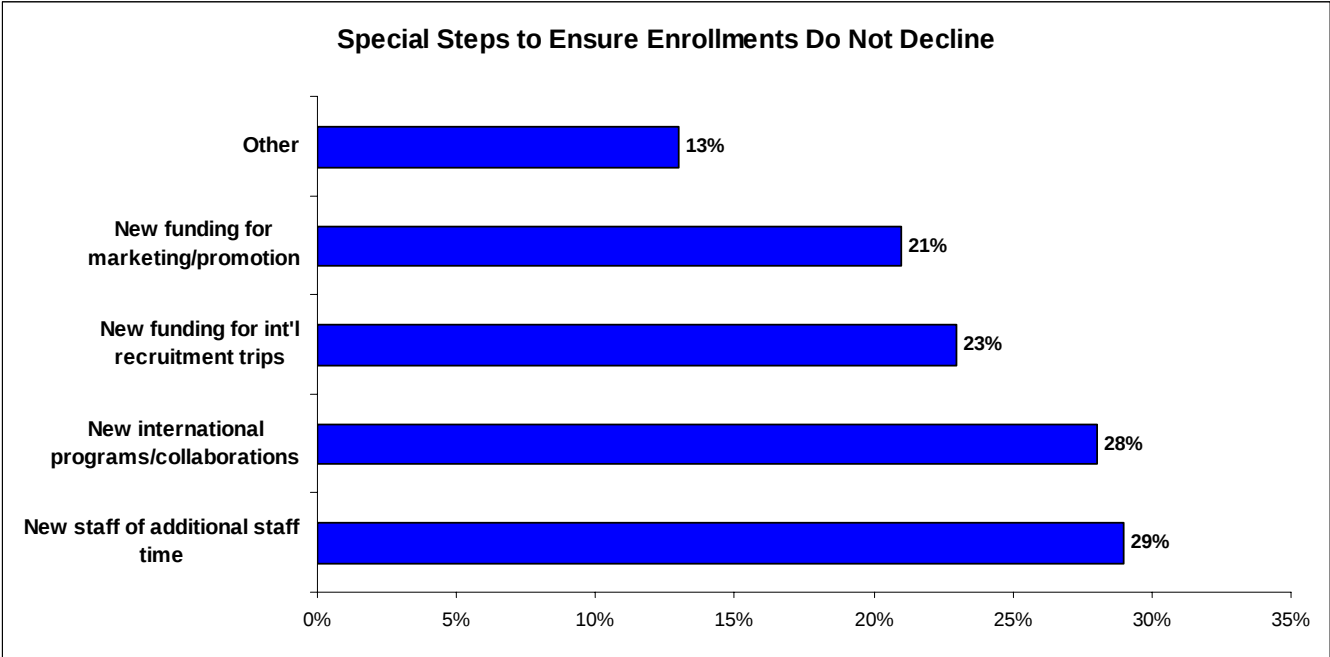


Figure 5c: If your institution has devoted more resources for international student recruitment trips, which countries/regions did you focus on?

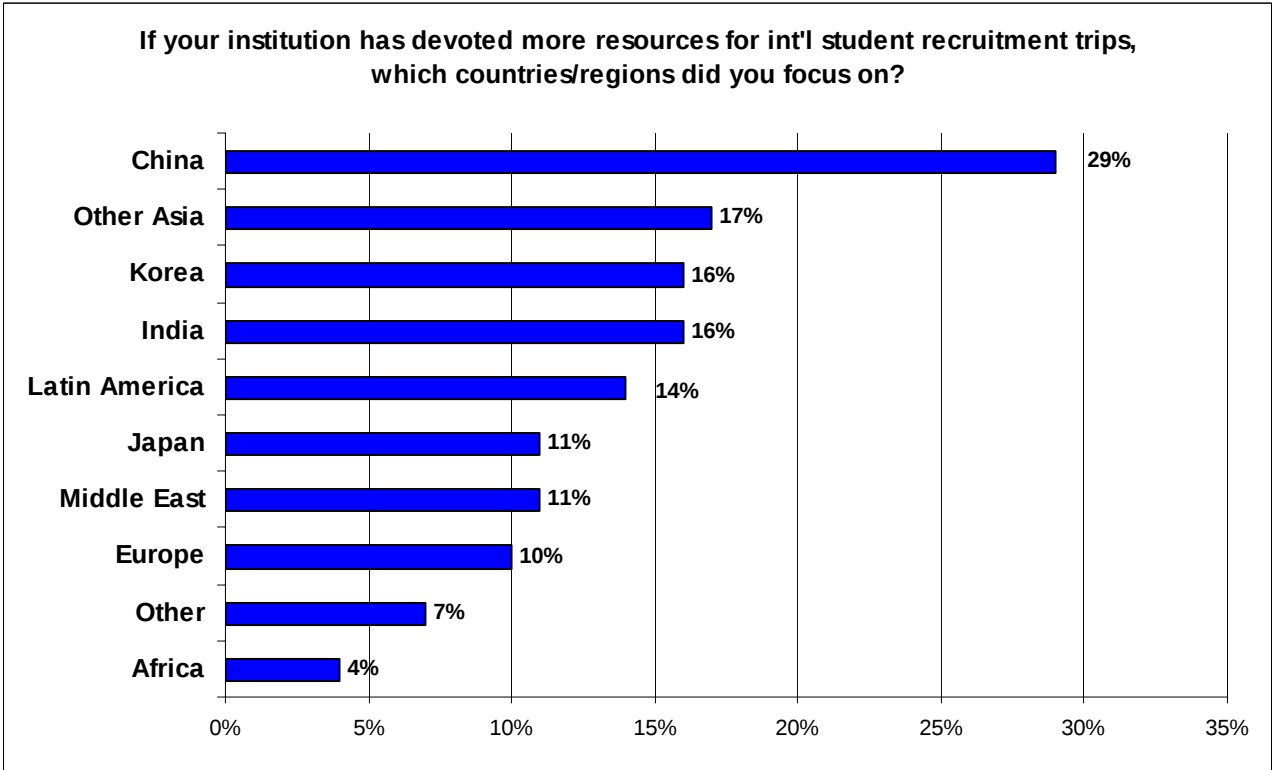
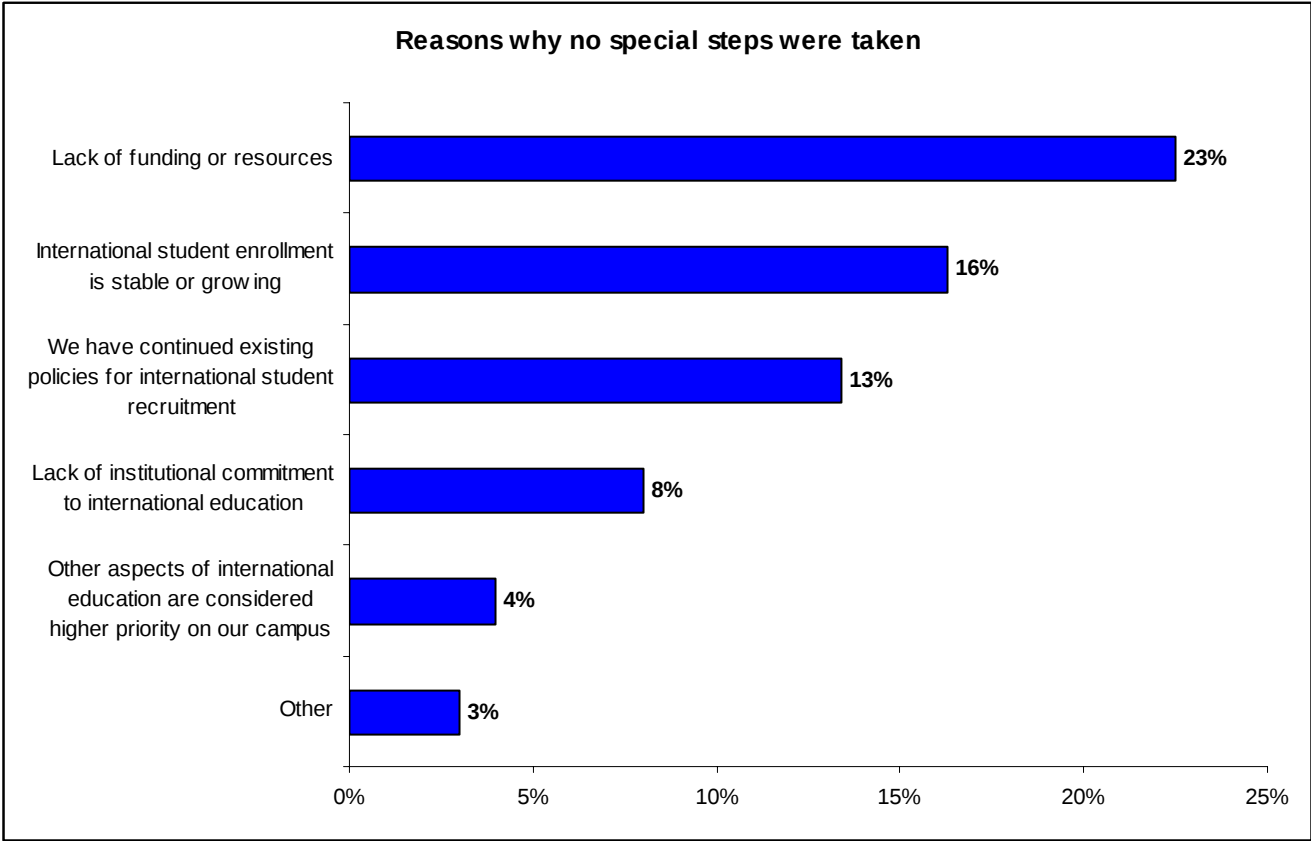


Figure 5d: If no special steps were taken, why not?



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, 34% (265 responding institutions) indicated that the growing reputation and visibility of the U.S. host institution abroad was a major reason for increases at their institutions, followed by more active recruitment efforts (cited by 32%), and a weak U.S. dollar that made U.S. tuition costs more attractive to international students (19%).
- Eighteen percent (139 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 (13%) and home country economic problems (8%). Of the 68 respondents (or 9%) 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, budget decreases and changes in admission quotas, or weak international student recruitment efforts.

Figure 6: Major Reasons for Reported Increases in Enrollments

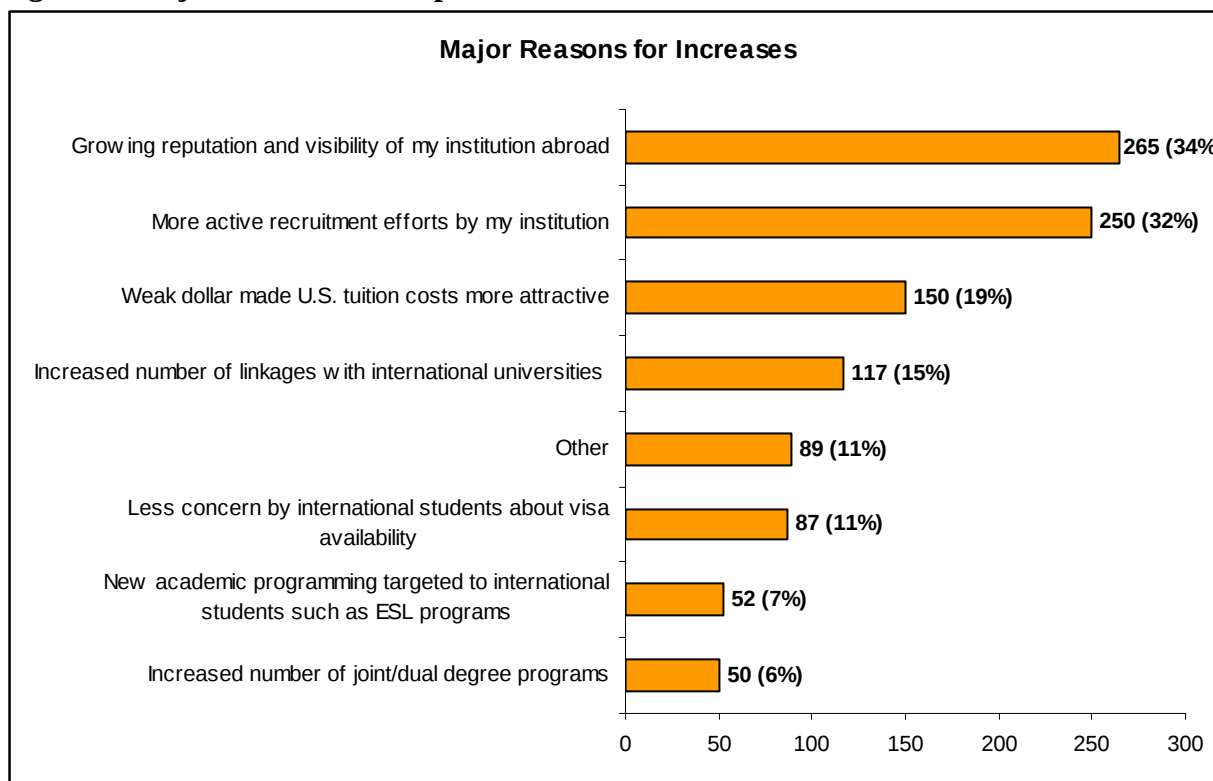
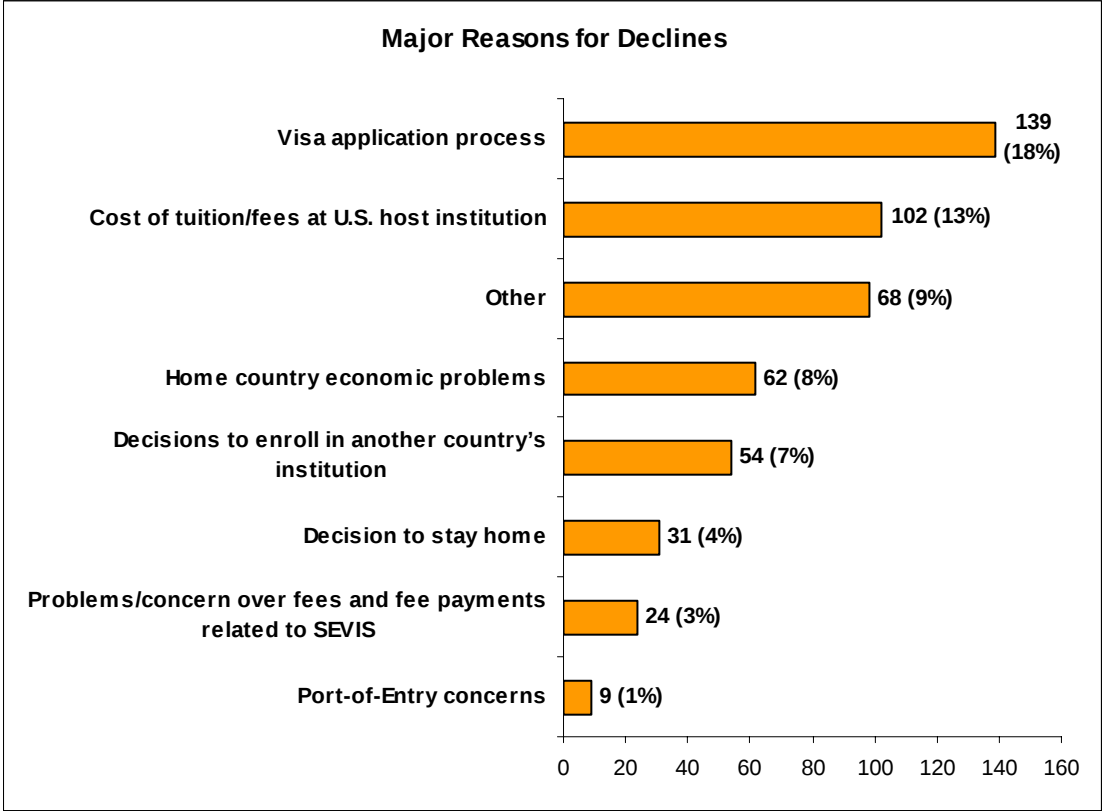


Figure 7: Major Reasons for Reported Declines in Enrollments

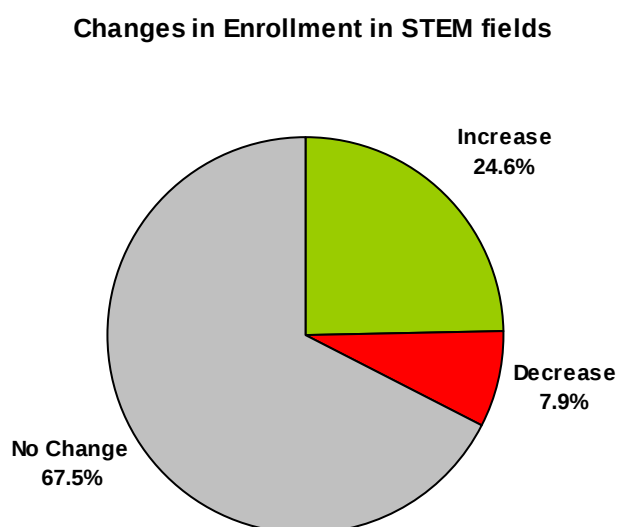


FIELDS OF STUDY

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 2008) compared to Fall 2007.

- 24.6% of respondents reported an increase in international student enrollments in STEM fields (Science, Technology, Engineering, and Mathematics), 7.9% reported a decline, and 67.5% saw no change.

Figure 8: Enrollment changes in STEM fields

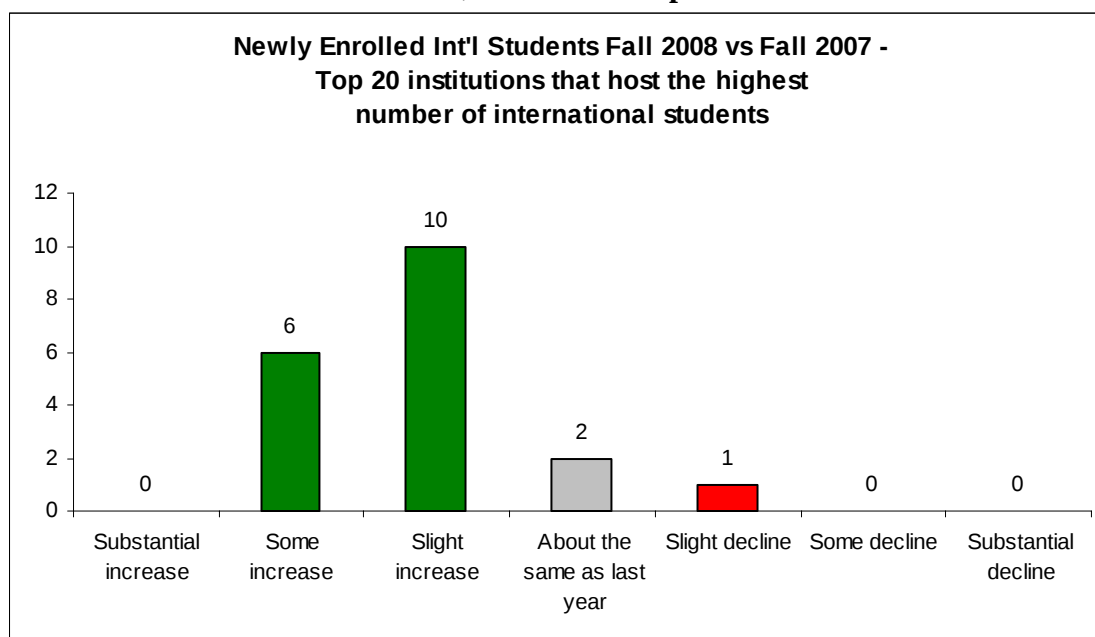


RESPONSES FROM THE TOP 20 HOST INSTITUTIONS THAT ENROLL THE HIGHEST NUMBER OF INTERNATIONAL STUDENTS

All Top 20 host institutions³ responded to this survey.

- Sixteen institutions (84%) 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 1 institution reported a slight decline.⁴
- Looking at overall international student enrollments, 17 (85%) of the Top 20 institutions reported an increase, while three reported no change.

Figure 9a: Newly enrolled international students at the Top 20 institutions that enroll the highest numbers of international students, Fall 2008 compared to Fall 2007.



Note: one institution did not provide an answer to this question.

³ The top 20 host institutions (according to *Open Doors 2007 Report on International Educational Exchange*) refer to the 20 institutions nationally that host the largest numbers of international students on their campuses.

⁴ One institution did not provide an answer on changes in newly enrolled international students.

Figure 9b: Overall international student enrollments at the Top 20 institutions that enroll the highest numbers of international students, Fall 2008 compared to Fall 2007.

