

FALL 2011 INTERNATIONAL STUDENT ENROLLMENT SURVEY

November 2011

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:

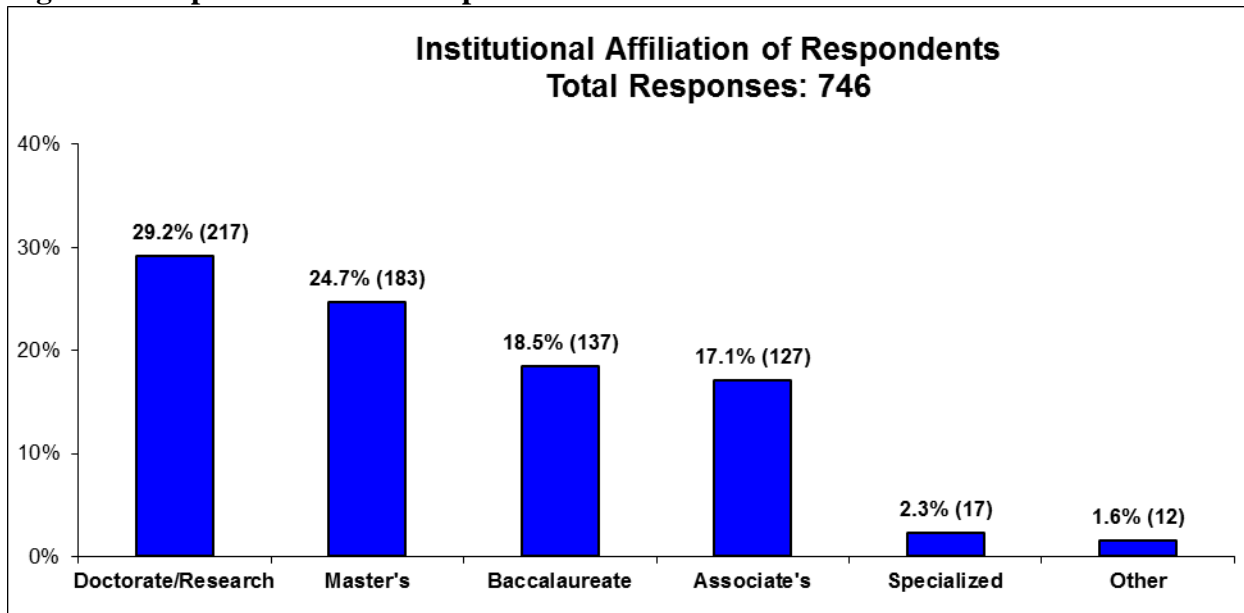
- American Association of Community Colleges (AACC)
- American Association of State Colleges and Universities (AASCU)
- American Council on Education (ACE)
- Association of American Universities (AAU)
- Association of Public and Land-grant Universities (APLU)
- Council of Graduate Schools (CGS)
- Institute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

The survey was conducted between October 3 and 21, 2011.

RESPONDENTS

- The survey received responses from 746 U.S. higher education institutions from all institutional types. Doctoral/research institutions represented the largest group of respondents, with 29.2% (217 respondents), followed by Master's institutions with 24.7% (183). Associate's institutions represented 17.1% (127) of respondents, followed by Baccalaureate institutions with 18.5% (137), Specialized institutions with 2.3% (17), and other types of institutions with 1.6% (12).
- Of the institutions, 59.7% (444) were public institutions and 40.3% (300) were private institutions.
- The survey received responses from 134 institutions that enroll more than 1,000 international students.
- Eighteen of the top 20 host institutions responded.¹

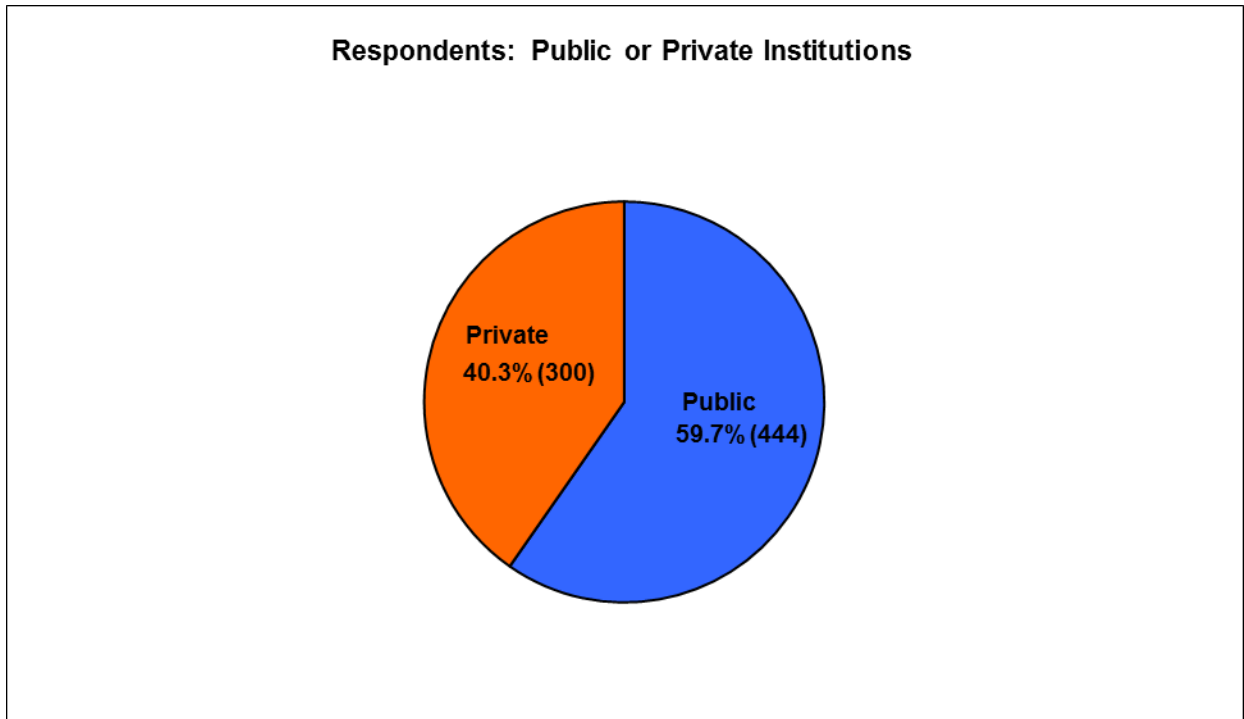
Figure 1: Respondents. Total Responses 746²



¹ The top 20 host institutions (according to *Open Doors 2010 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 2011) compared to Fall 2010?

- Of all responding institutions, 52.4% (or 389 respondents) reported an increase, 22.9% (170) reported a decline, and 24.7% (183) reported level enrollments. Last year, 51.9% reported an increase, 24.4% a decline, and 23.7% level enrollments.
- Of the responding institutions that enroll more than 1,000 international students (134 institutions that responded to this question), 60.4% (81 responding institutions) reported increases, 17.2% (23 institutions) reported declines, and 22.4% (30 institutions) reported level enrollments. Last year, 65% reported increases, 20.3% reported declines, and 14.6% reported level enrollments.
- Of the responding two-year colleges, 31.5% (40 responding institutions) reported increases, 27.6% (35 institutions) reported declines, and 40.9% (52 institutions) reported level enrollments. Last year, 44% reported increases, 25.5% reported declines, and 30.5% reported level enrollments.
- Of the responding Research/Doctoral institutions, 67.3% (144 responding institutions) reported increases, 17.8% (38 institutions) reported declines, and 14.9% (32 institutions) reported level enrollments. Last year, 60.2% reported increases, 21.9% reported declines, and 17.9% reported level enrollments.
- Of the responding Baccalaureate institutions, 50.8% (93 responding institutions) reported increases, 21.3% (39 institutions) reported declines, and 27.9% (51 institutions) reported level enrollments. Last year, 53.3% reported increases, 19% reported declines, and 27.7% reported level enrollments.
- Of the responding Master's institutions, 48.1% (89 responding institutions) reported increases, 28.1% (52 institutions) reported declines, and 23.8% (44 institutions) reported level enrollments. Last year, 47.4% reported increases, 34.2% reported declines, and 18.6% reported level enrollments.

Figure 2a: Newly enrolled international students, Fall 2011 compared to Fall 2010.

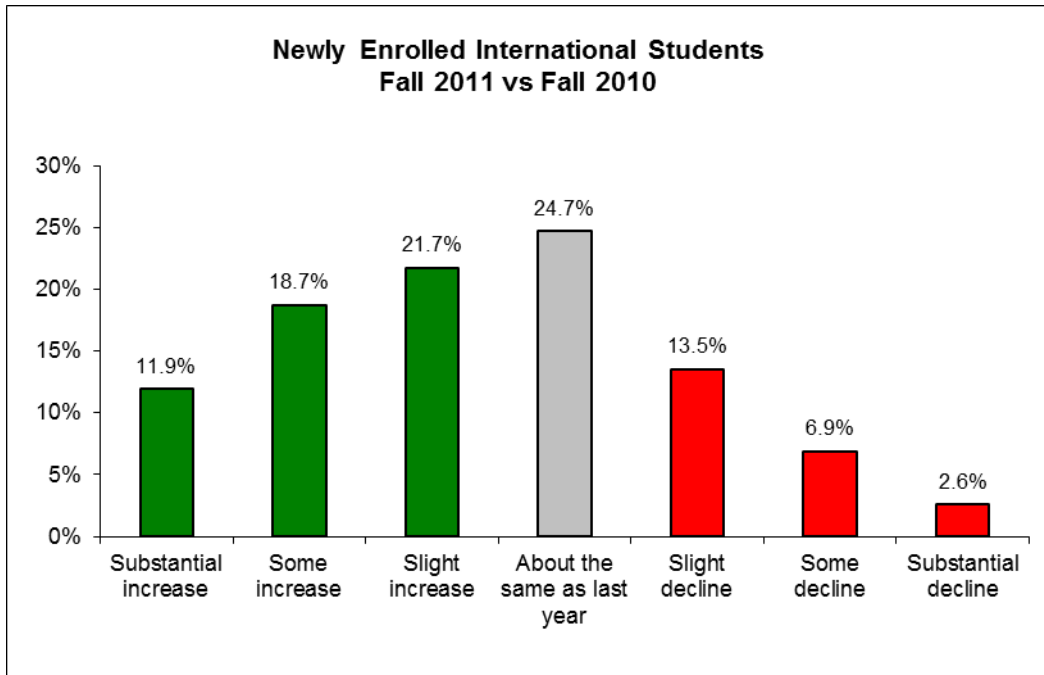


Figure 2b: Newly enrolled international students at institutions enrolling more than 1,000 international students, Fall 2011 compared to Fall 2010.

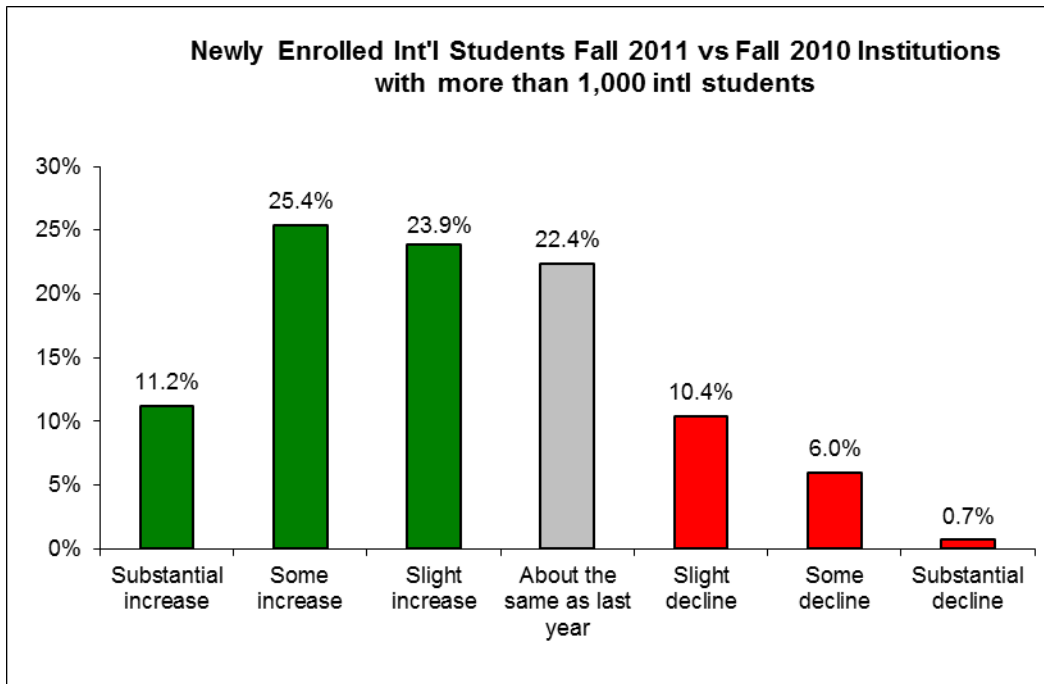


Table 2c: Two-Year Colleges:

Newly enrolled international students at institutions at two-year colleges, Fall 2011 compared to Fall 2010.

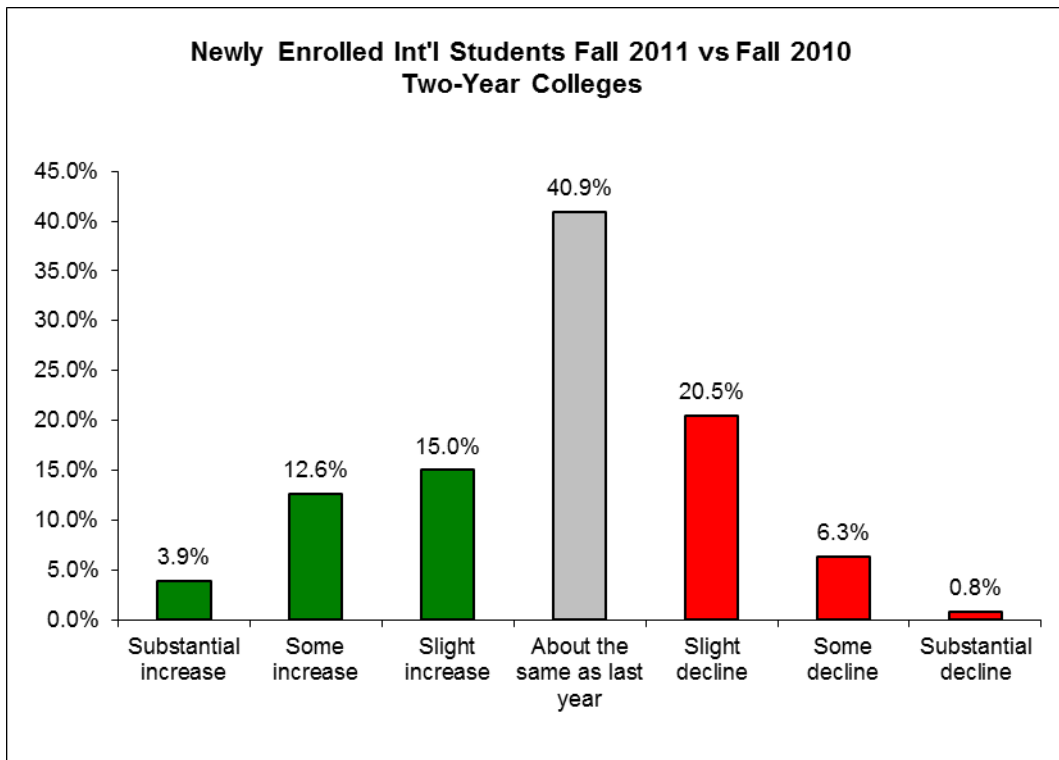


Figure 2d: Doctoral/Research Institutions:

Newly enrolled international students at institutions at Doctoral/Research institutions, Fall 2011 compared to Fall 2010.

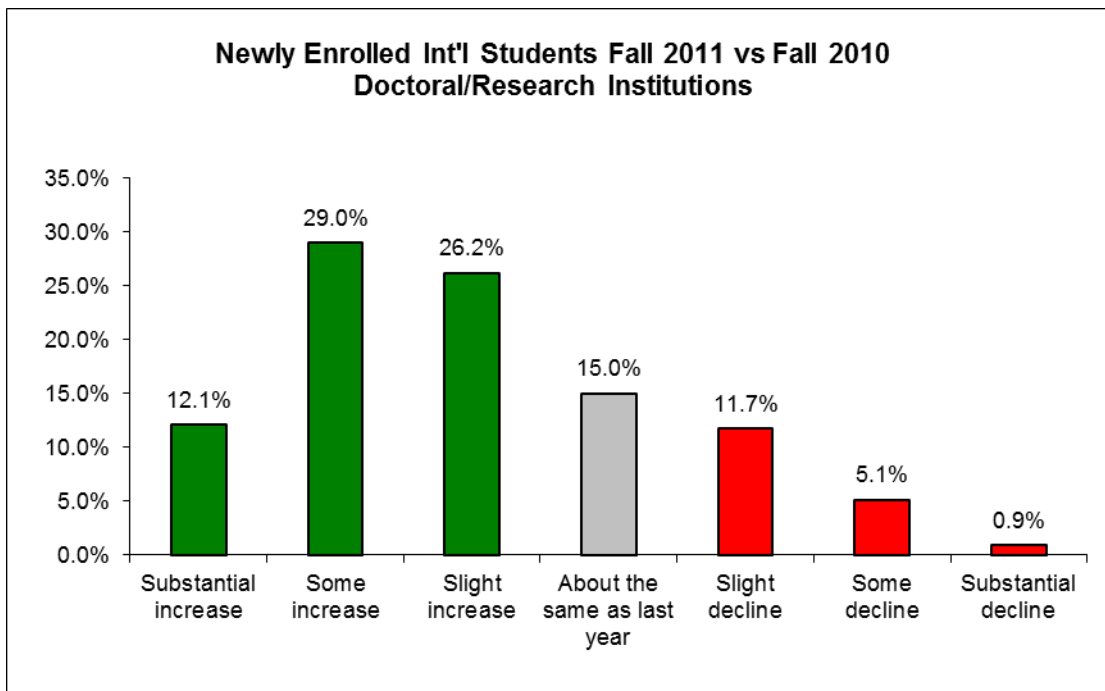


Figure 2e: Baccalaureate Institutions:
Newly enrolled international students at institutions at Baccalaureate Institutions, Fall 2011 compared to Fall 2010.

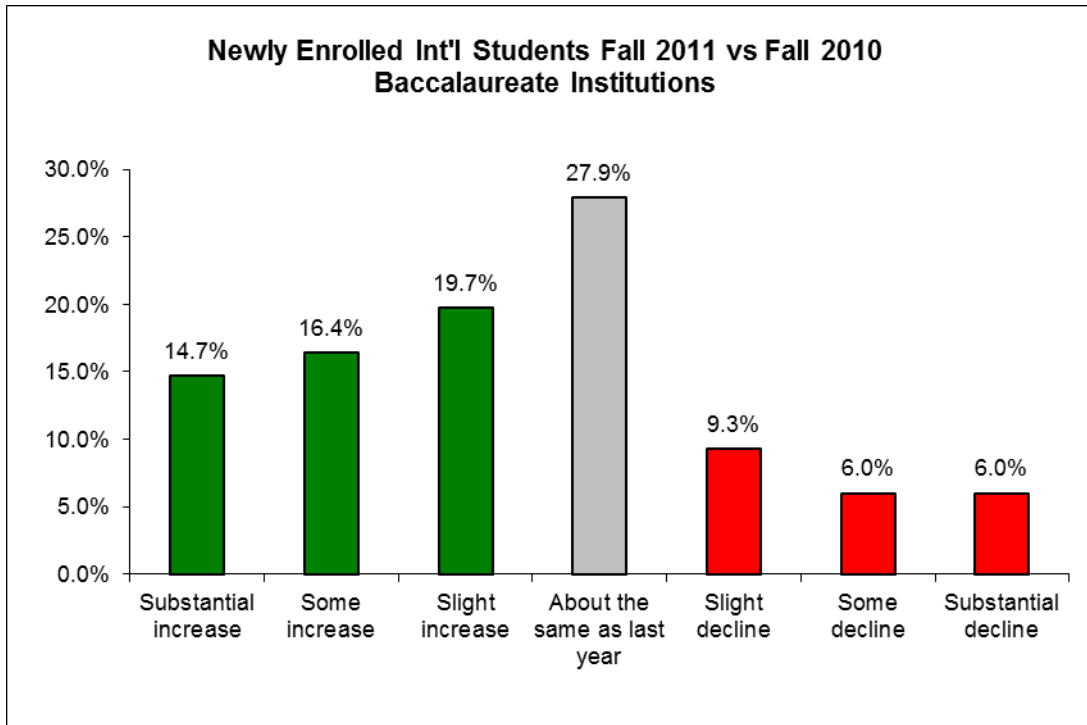
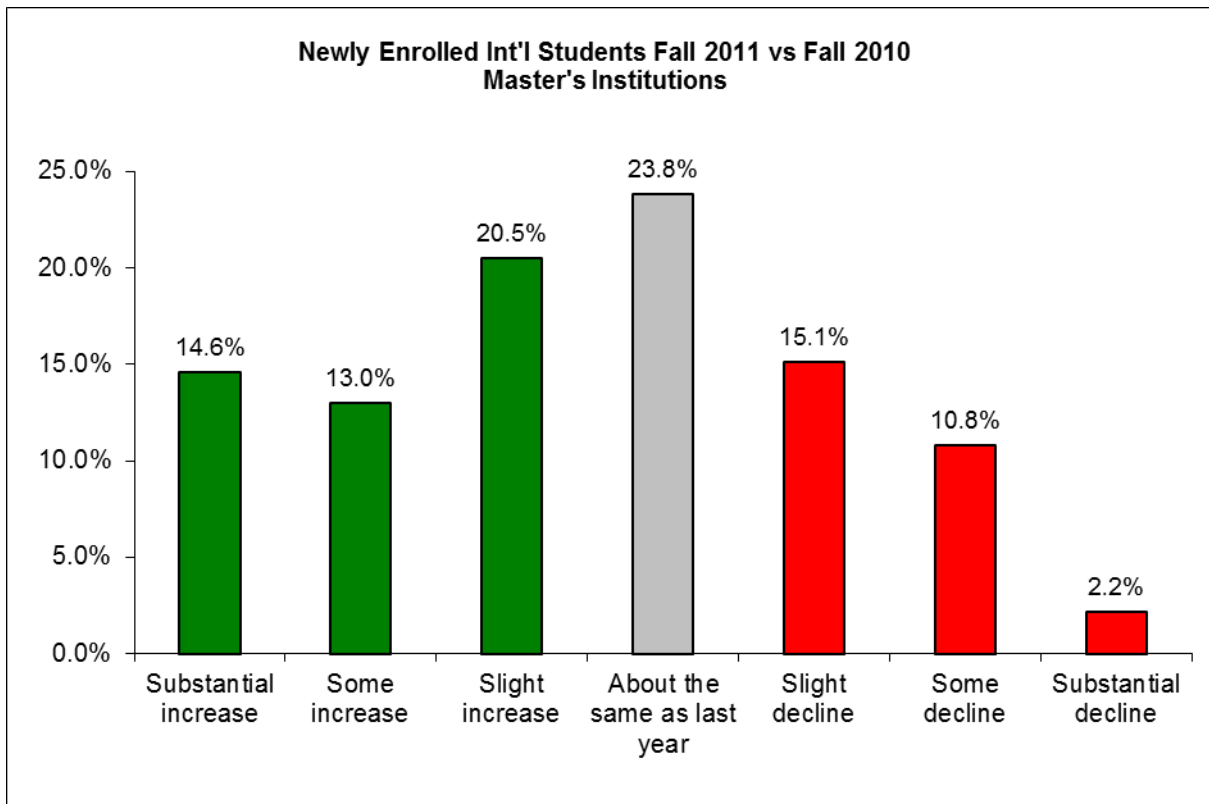


Figure 2f: Master's Institutions:
Newly enrolled international students at institutions at Master's Institutions, Fall 2011 compared to Fall 2010.



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 2011), compared to Fall 2010?

- Of all responding institutions, 53.2% (or 391 respondents) reported an increase, 20.1% (148) reported a decline, and 26.7% (196) reported level enrollments. Last year, 52.4% reported an increase, 20.5% reported a decline, and 27.1% reported level enrollments.
- Of the responding institutions that enroll more than 1,000 international students (131 institutions that responded to this question), 80.2% (105 responding institutions) reported increases, 7.6% (10 institutions) reported declines, and 12.2% (16 institutions) reported level enrollments. Last year, 73.6% reported increases, 11.6% reported declines, and 14.9% reported level enrollments.
- Of the responding two-year colleges, 53.7% (65 responding institutions) reported increases, 19% (23 institutions) reported declines, and 27.3% (33 institutions) reported level enrollments. Last year, 39.4% reported increases, 29.2% reported declines, and 31.4% reported level enrollments.
- Of the responding Research/Doctoral institutions, 54.6% (118 responding institutions) reported increases, 19.4% (42 institutions) reported declines, and 26% (56 institutions) reported level enrollments. Last year, 66.3% reported increases, 24.7% reported declines, and 20.1% reported level enrollments.
- Of the responding Baccalaureate institutions, 52% (94 responding institutions) reported increases, 21.5% (39 institutions) reported declines, and 26.5% (48 institutions) reported level enrollments. Last year, 50% reported increases, 15.6% reported declines, and 34.3% reported level enrollments.
- Of the responding Master's institutions, 52.7% (97 responding institutions) reported increases, 19% (35 institutions) reported declines, and 28.3% (52 institutions) reported level enrollments. Last year, 47% reported increases, 27.3% reported declines, and 25.6% reported level enrollments.

Figure 3a: Total International Student Enrollments, Fall 2011 compared to Fall 2010.

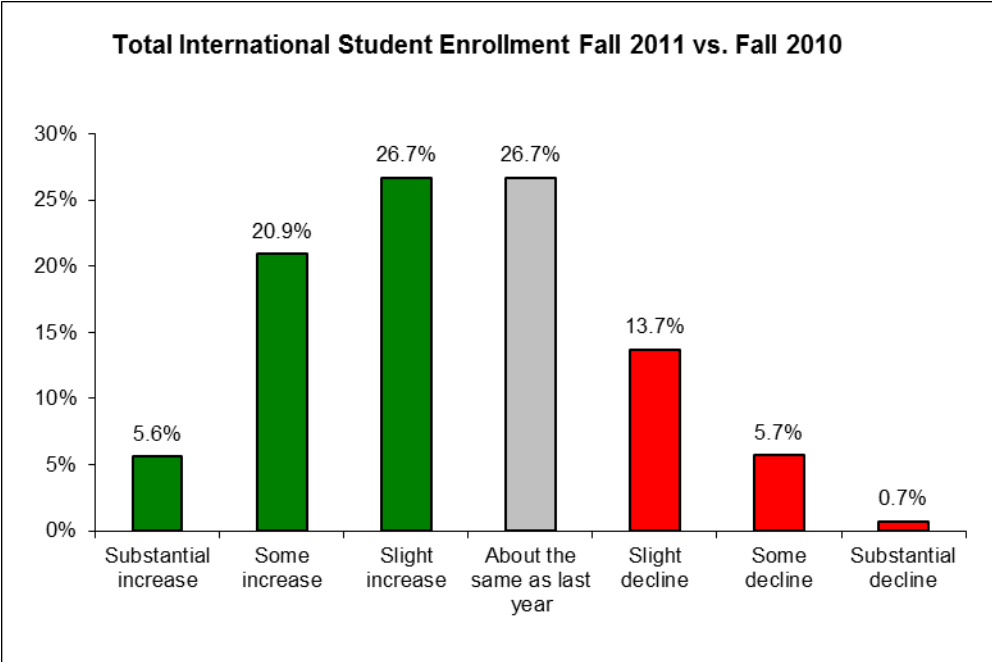


Figure 3b: Total international student enrollments at institutions with more than 1,000 international students, Fall 2011 vs. Fall 2010.

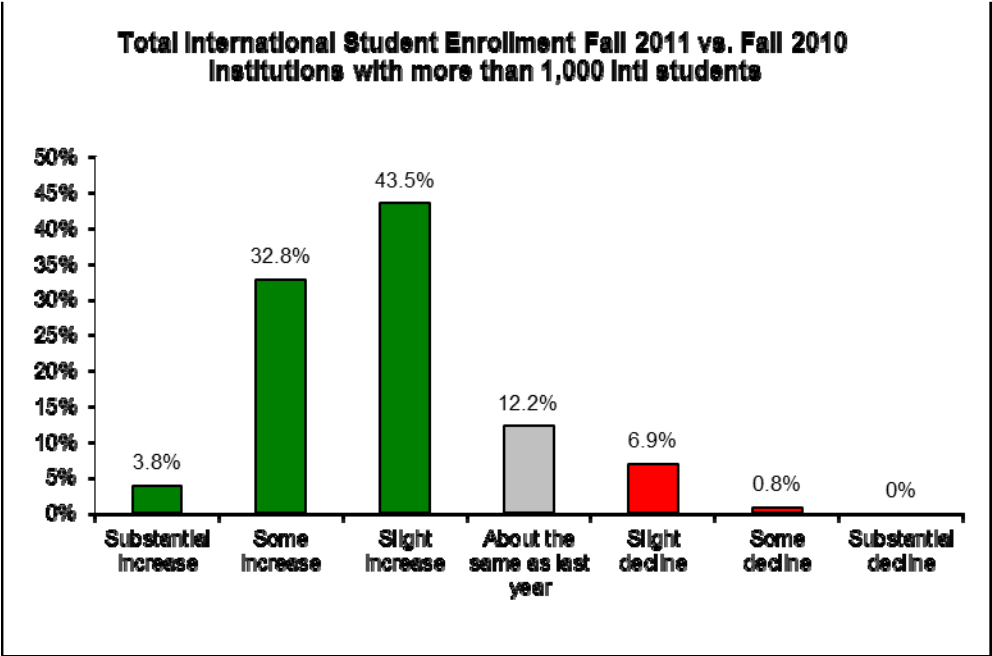


Figure 3c: Two-Year Colleges: Total international student enrollments at two-year colleges, Fall 2011 vs. Fall 2010.

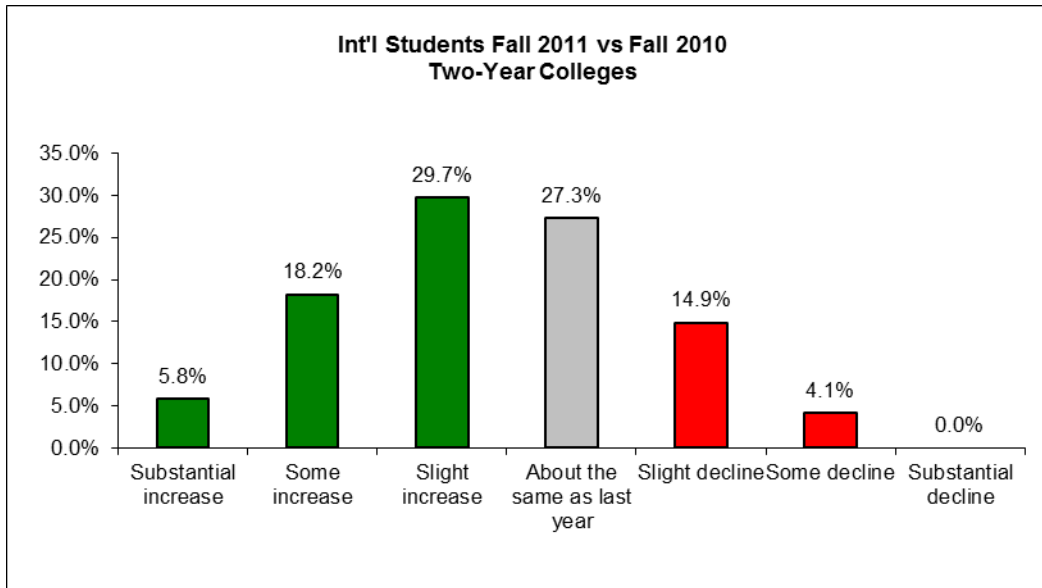


Figure 3d: Doctoral/Research Institutions: Total international student enrollments at Doctoral/Research institution, Fall 2011 vs. Fall 2010.

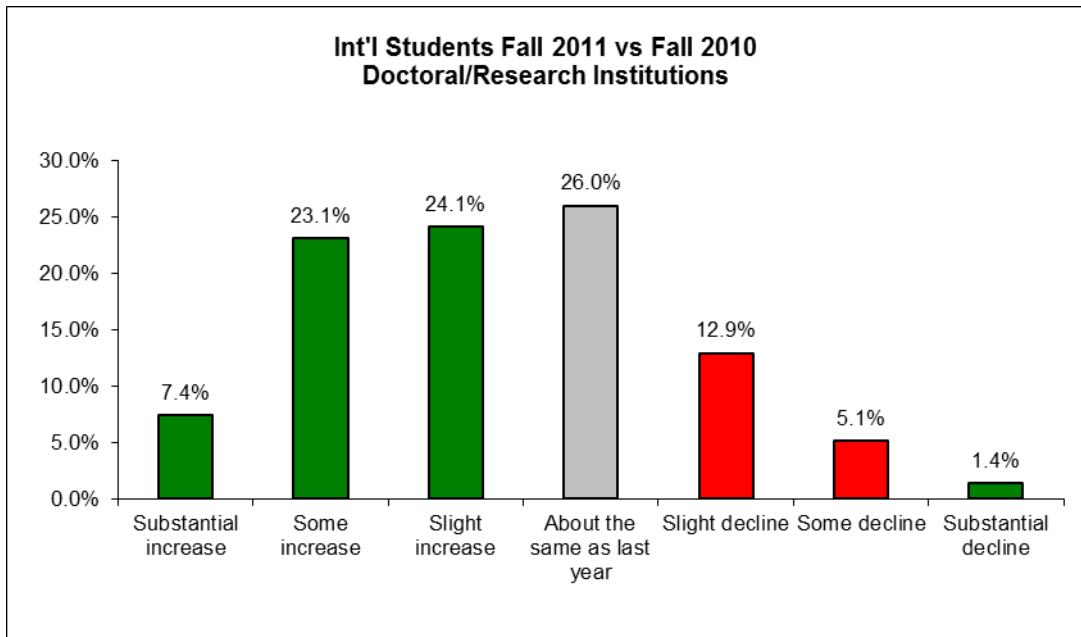


Figure 3e: Baccalaureate Institutions: Total international student enrollments at Baccalaureate institutions, Fall 2011 vs. Fall 2010.

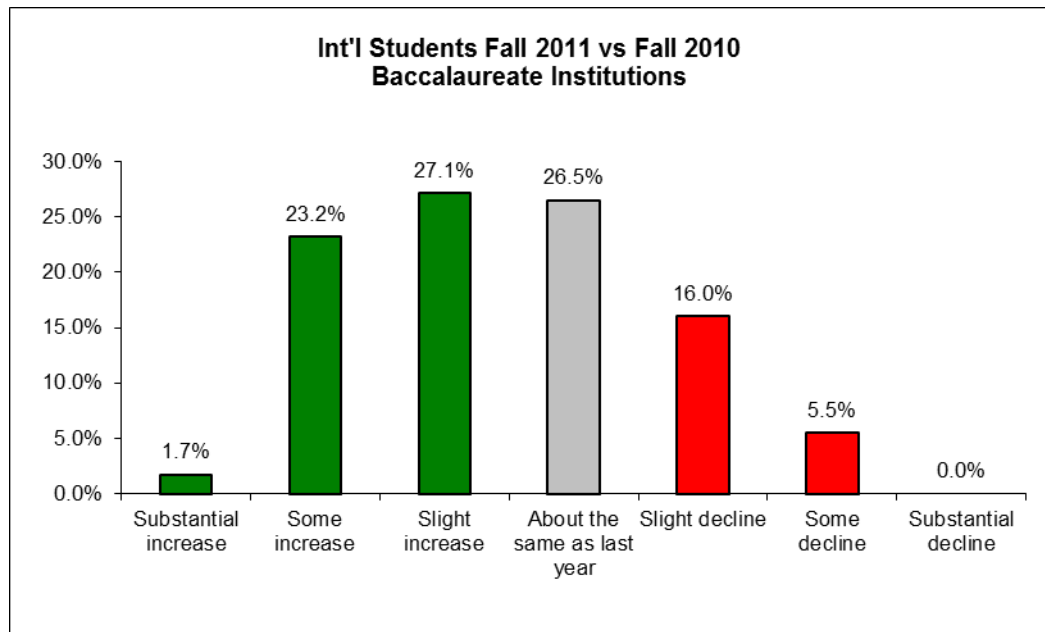
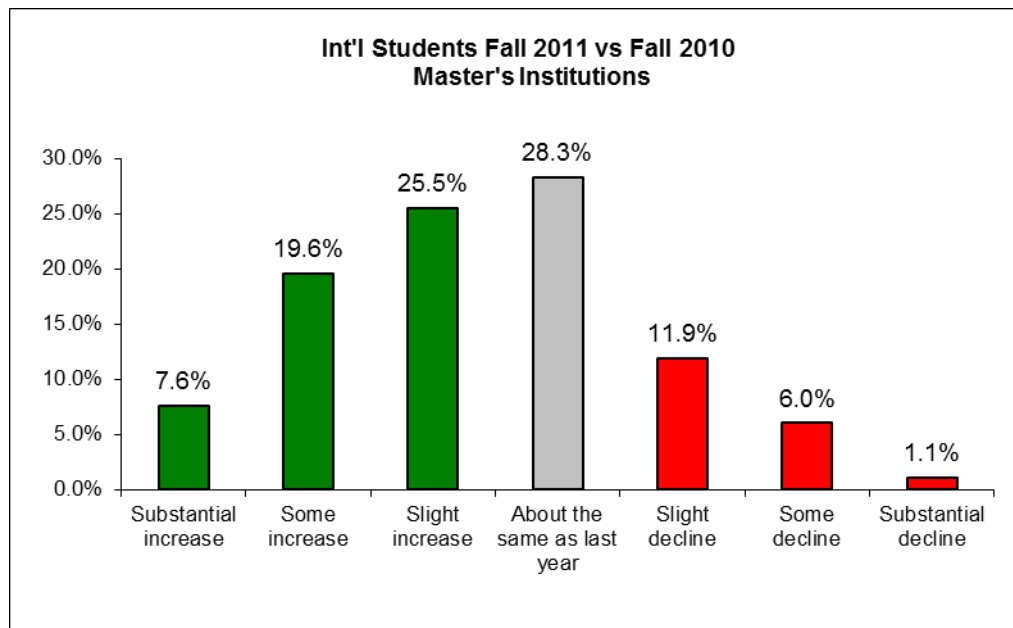


Figure 3f: Master's Institutions: Total international student enrollments at Master's institutions, Fall 2011 vs. Fall 2010.



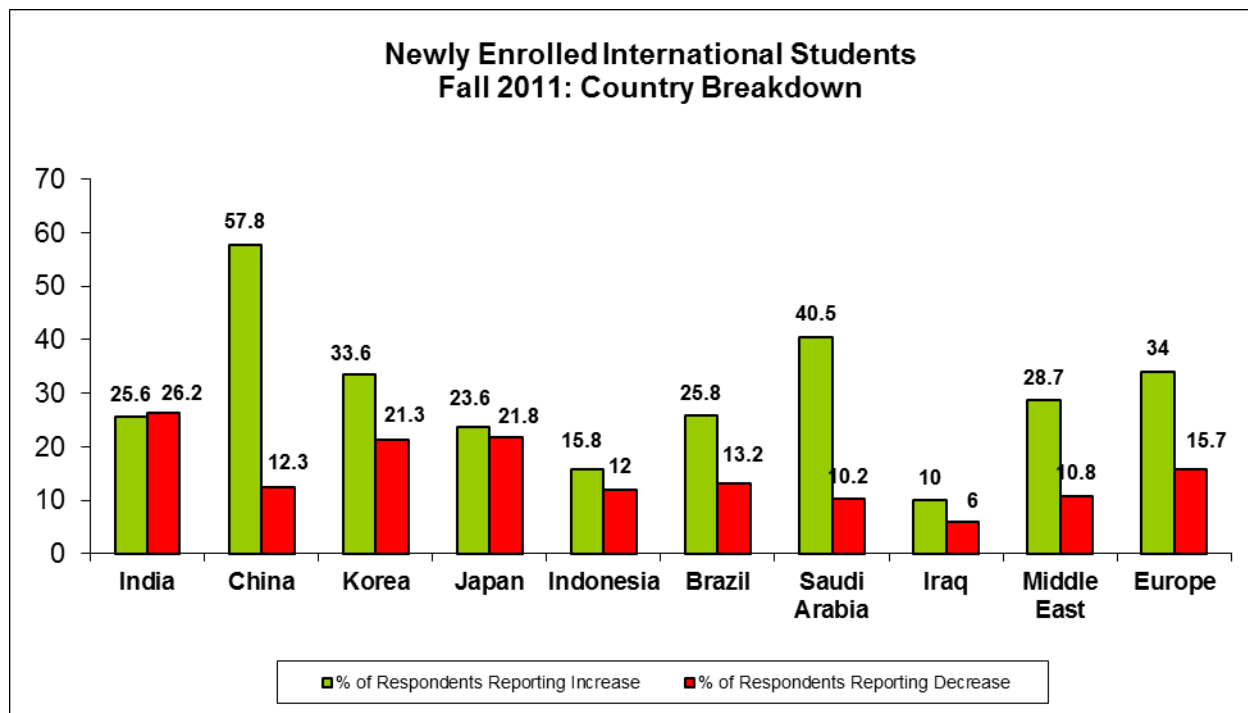
COUNTRY BREAKDOWN: **NEW INTERNATIONAL STUDENT ENROLLMENTS**

What change, if any, have you noticed for Fall 2011 compared to Fall 2010 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 (57.8% reporting increases vs. 12.3% reporting declines, and the rest reporting level enrollments)
 - Saudi Arabia (40.5% reporting increases vs. 10.2% reporting declines)
 - Korea (33.6% reporting increases vs. 21.3% reporting declines)
 - Brazil (25.8% reporting increases vs. 13.2% reporting declines)
 - Iraq (10% reporting increases vs. 6% reporting declines)
- For Japan, enrollments are on the rise again (23.6% reporting an increase vs. 21.8% reporting a decline)
- For India, numbers seem to be on the decline, with 26.2% of responding institutions reporting a decline and 25.6% reporting an increase. At least 7.5% (46 respondents) of respondents reported the most substantial decline in students coming from India.
- For Middle East as a region, 28.7% of respondents reported an increase and 10.8% 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.*
- For Europe as a region, 34% of respondents reported an increase (a slight decrease from Fall 2010) and 15.7% 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 2011 compared to Fall 2010.



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, 61.8 percent (461) of all responding institutions have taken special steps to ensure that the number of international students on their campuses does not decline, while 38.2% (285) have not taken any special steps.
- Special steps included new staff or additional staff time devoted to international recruitment (cited by 53.5%) and new international programs or collaborations (cited by 52.7%) and, followed by new funding for international recruitment trips (37.1%), and new funding for marketing and promotion of programs (31.6%). Other steps included more support and information for international students, more focused budgets, partnerships with schools, new and interactive online marketing efforts, and working with agents, recruiters, or sponsoring organizations.
- The institutions that did not take special steps mainly cited a lack of funding or resources (19.3%), an international student enrollment that is stable or growing (15.8%) and continued existing policies for international student recruitment (14.5%).
- Institutions that have devoted more resources for international student recruitment trips seem to have concentrated mainly on Asia. 30.8% of responding institutions specifically devoted resources to recruit international students from China, followed by countries in Southeast Asia (19.1%), India (19.3%), Middle East (15%) and Korea (15.4%). Institutions also devoted more resources to recruitment trips to Latin America (14.3%), Europe (9.8%), and Africa (4%). In written responses, many institutions indicated also recruiting students in Nepal, Indonesia, Vietnam, Russia, and the Caribbean.

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

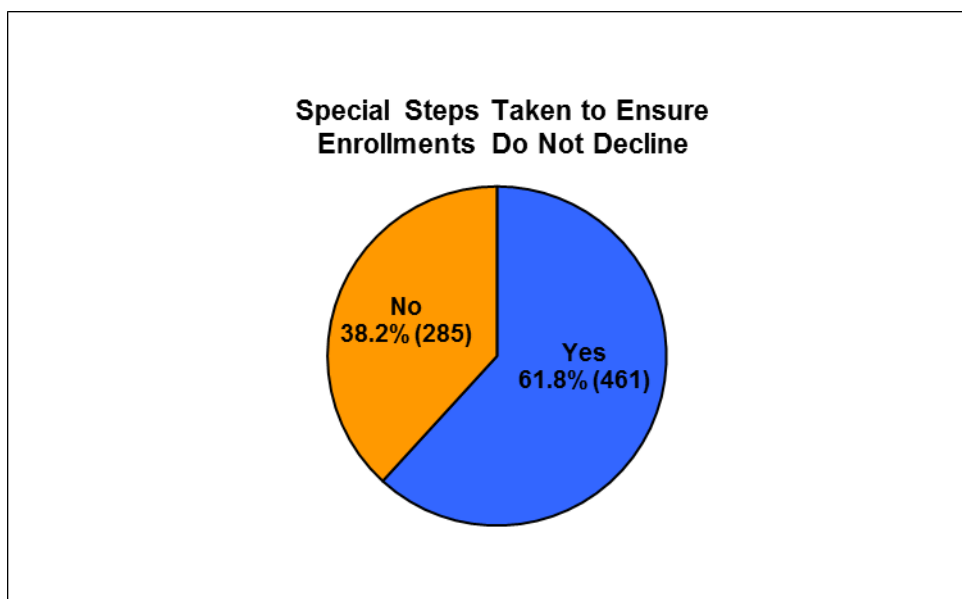


Figure 5b: Which steps were taken?

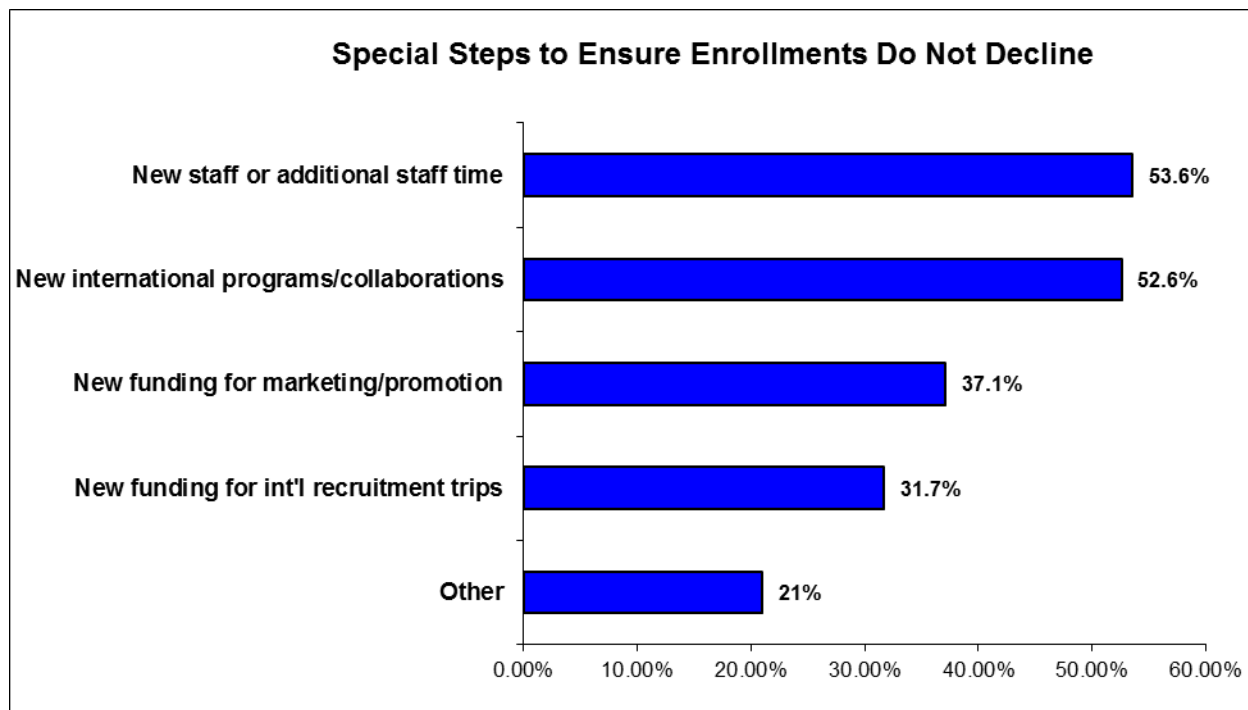


Figure 5c: If no special steps were taken, why not?

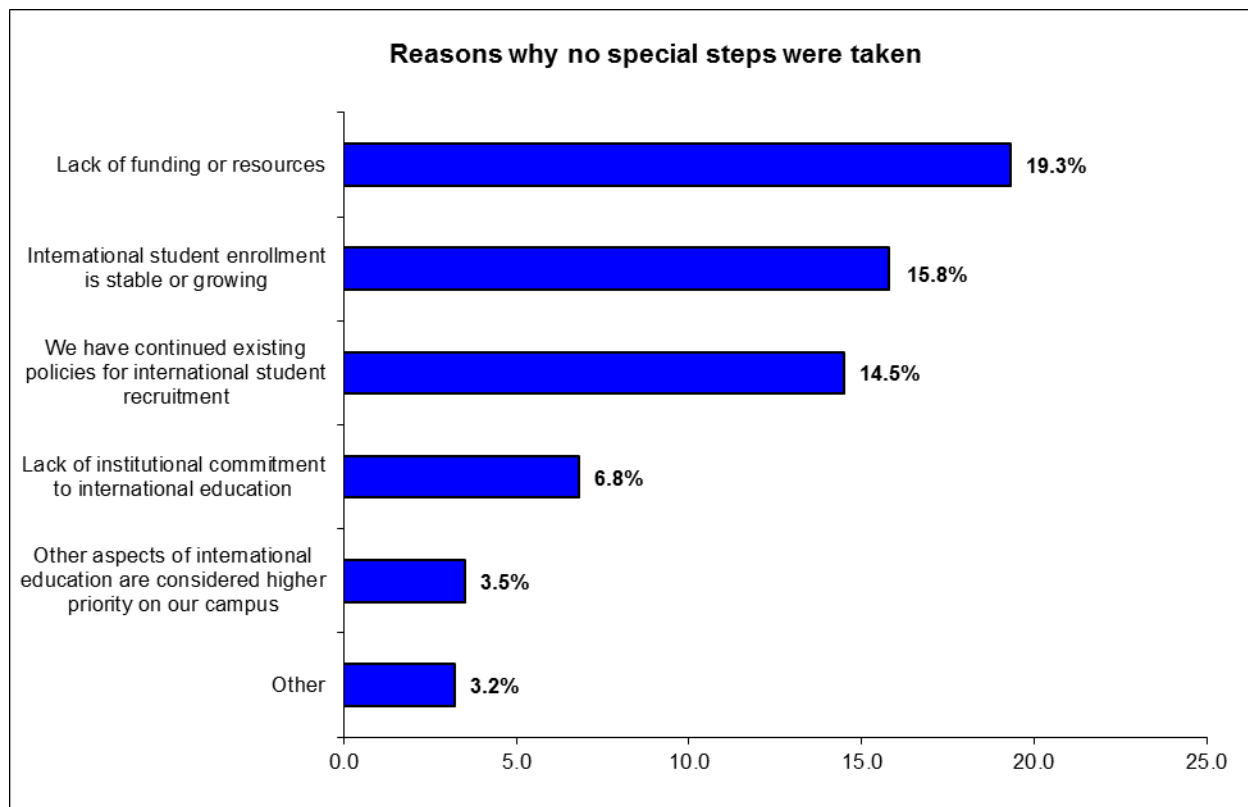
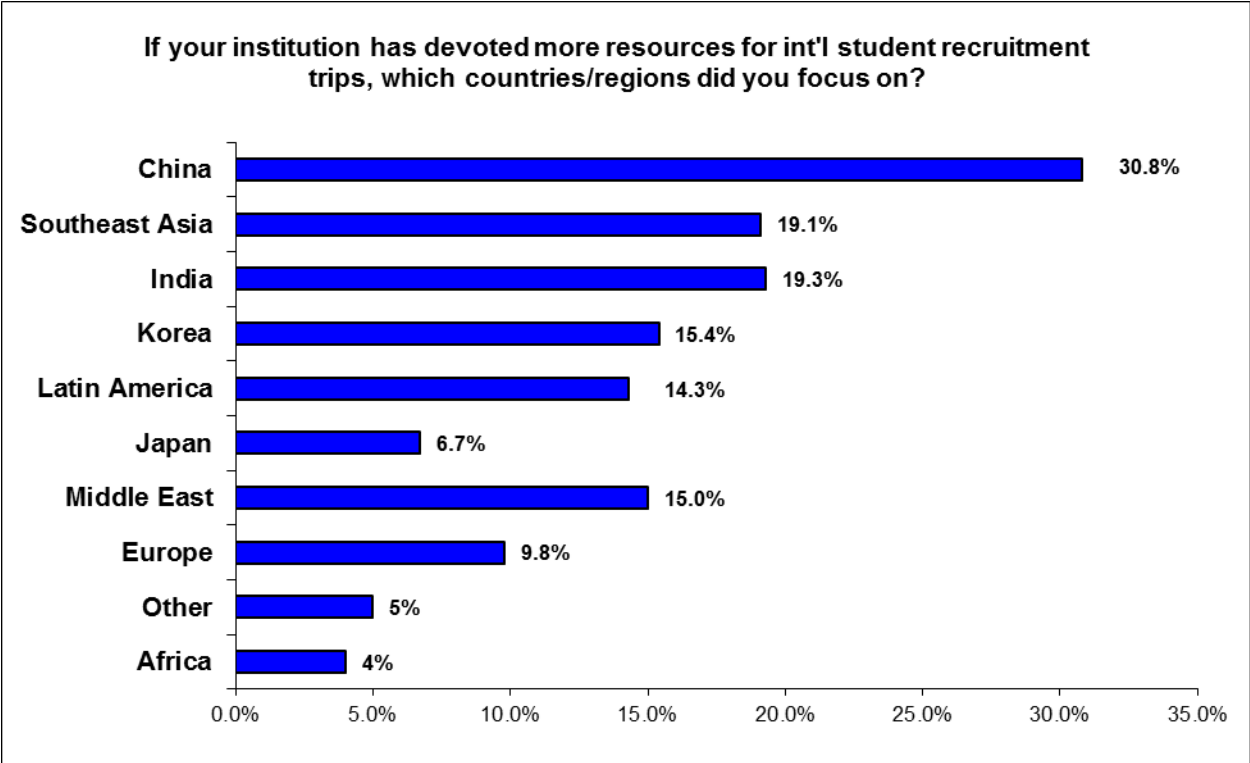


Figure 5d: If your institution has devoted more resources for international student recruitment trips, which countries/regions did you focus on?



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, 35.3% (138 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 33%), and an increased number of linkages with international universities (16.1%).
- Almost 17% 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 (15.5%) and the world financial crisis (13.5%). Of the 8.1% who chose “other” as their response, many indicated reduced or misguided recruitment efforts, changing admissions requirements, and declines in budgets and number of scholarships or available financial aid to international students.
- Of the institutions who attributed the declines to the world financial crisis, 75.9% believe that home country economic problems are the major reason, based on feedback from international applicants, followed by students’ perceptions of less scholarship opportunities in the U.S. (39%) and students’ difficulty in obtaining loans (36.8%).

Figure 6: Major Reasons for Reported Increases in Enrollments

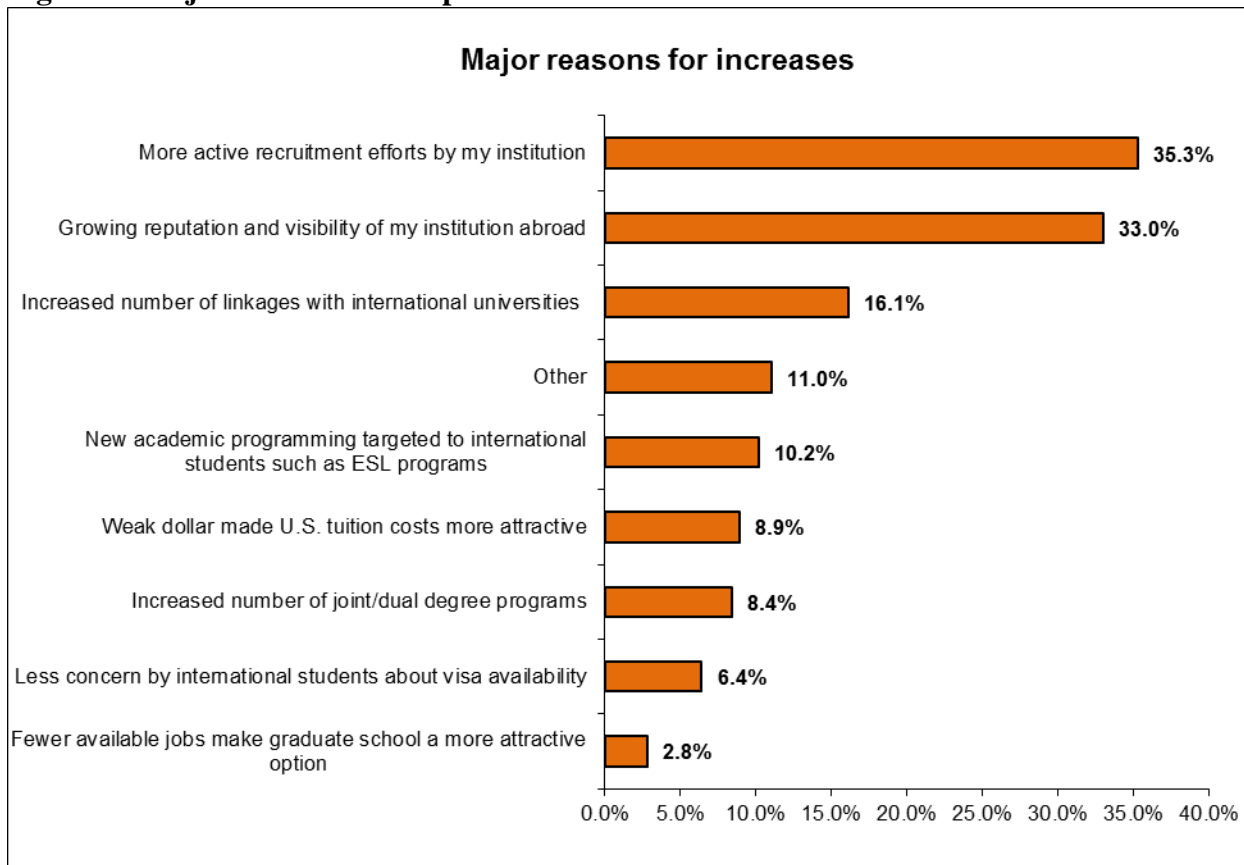


Figure 7: Major Reasons for Reported Declines in Enrollments

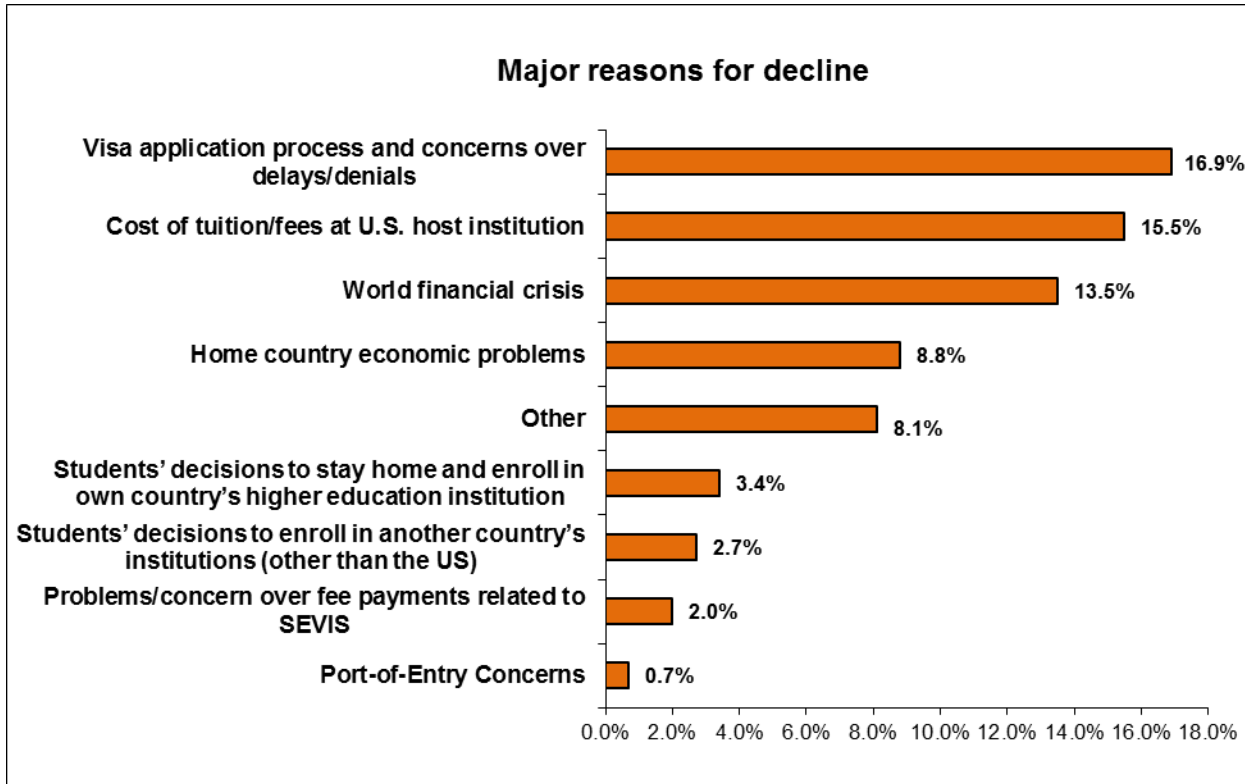
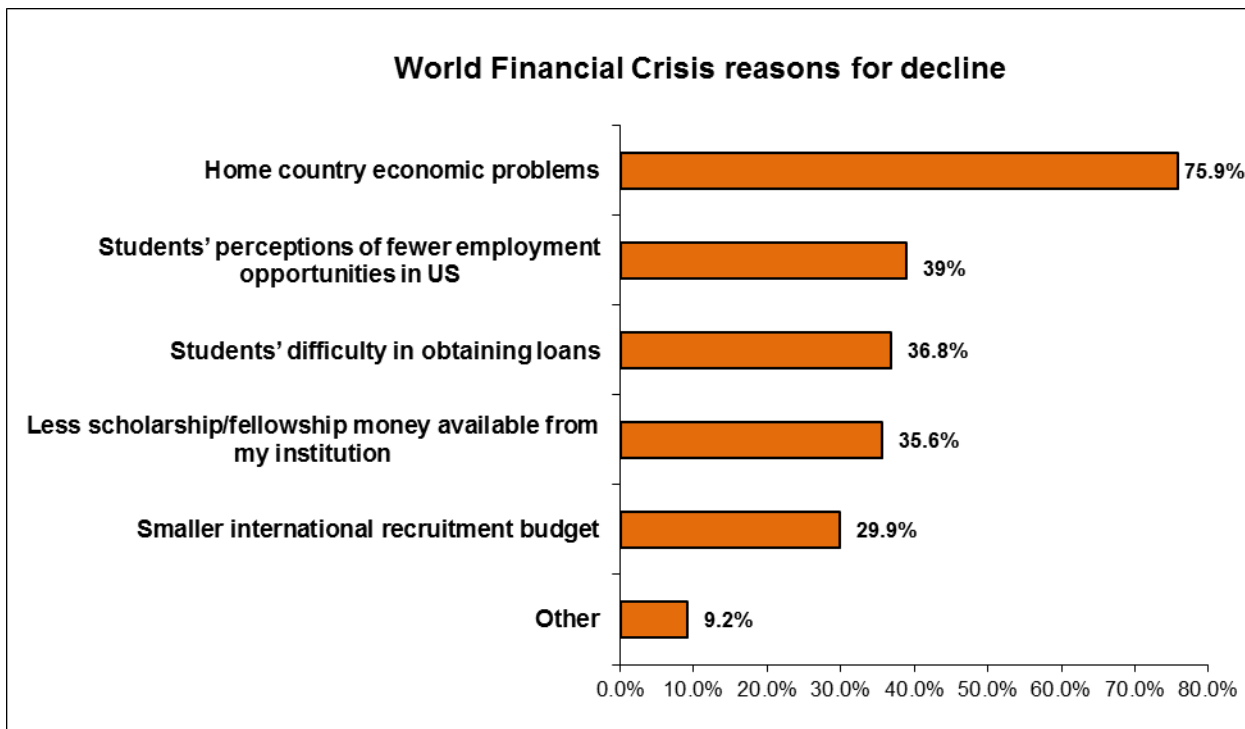


Figure 8: Reasons for Declines related to World Financial Crisis

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

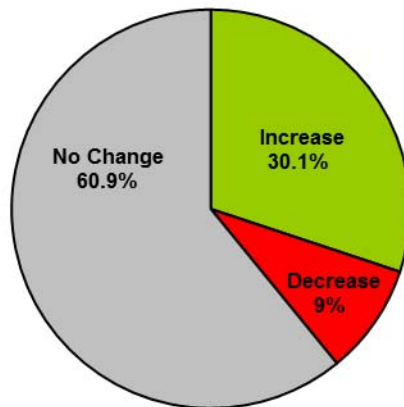
STEM Fields

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 2011) compared to Fall 2010.

- 30.1% of respondents reported an increase in international student enrollments in STEM fields (Science, Technology, Engineering, and Mathematics), 9% reported a decline, and 60.9% saw no change.

Figure 9: Enrollment changes in STEM fields

Changes in Enrollment in STEM fields

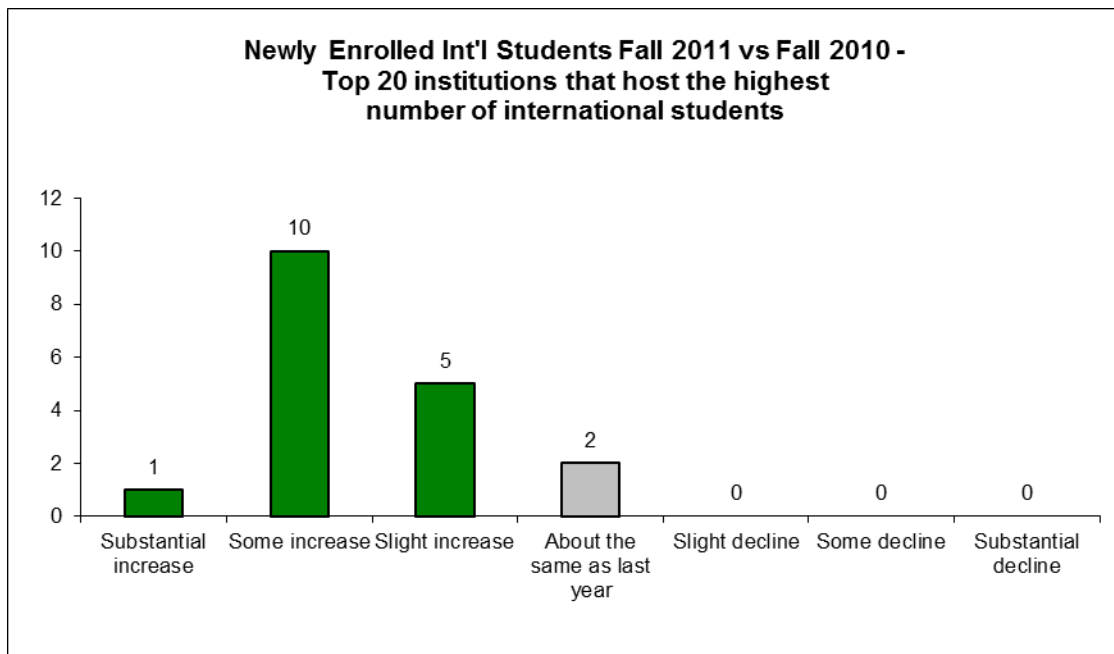


RESPONSES FROM THE TOP 20 HOST INSTITUTIONS THAT ENROLL THE HIGHEST NUMBER OF INTERNATIONAL STUDENTS

Eighteen of the top host institutions⁴ responded to this survey.

- Sixteen of the 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. No institutions report a decline and 2 institutions report no change.
- Looking at overall international student enrollments, 10 respondent institutions reported an increase, and eight institutions reported declines or level enrollments.

Figure 11a: Newly enrolled international students at the Top 20 institutions that enroll the highest numbers of international students, Fall 2011 compared to Fall 2010.



⁴ The top 20 host institutions (according to *Open Doors 2010 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 2011 compared to Fall 2010.

