



THE FORUM ON EDUCATION ABROAD
Survey on the Impact of the Global Economic Crisis on Education Abroad

September 15, 2009

The Forum on Education Abroad is a global membership association of nearly 400 institutions and organizations that together represent approximately 90% of the U.S. students that study abroad. The Forum is the only organization devoted exclusively to representing the field of education abroad and is designated the Standards Development Organization for education abroad by the U.S. Department of Justice and Federal Trade Commission.

In order to provide information to its members, the field and the general public, the Forum conducted a survey of its members to assess the impact of the global economic crisis on education abroad. 165 Forum member institutions responded to a survey that was conducted between August 24 – September 4, 2009. The results provide the most comprehensive and up-to-date data on how the economic crisis is impacting U.S. education abroad activity. The survey asked about the impact of the economic crisis on enrollment in education abroad programs, budgeting for education abroad, and impact on students' choice of education abroad programs.

Responses

A total of 165 institutional members responded out of 373 Forum members invited to participate, a response rate of 44%.

Type of Institution/Organization	Number Responding
U.S. Private College/University	88
U.S. Public College/University	39
U.S.-Based Provider Organization	15
Internationally-Based Provider Organization	13
International University	10
Total Responses	165

Results

66% of respondents (110 institutions/organizations) report that the global economic crisis has negatively impacted their education abroad programs. 84% of public universities and 57% of private universities and colleges report a negative impact. 87% of U.S.-based provider organizations and 62% of internationally-based provider organizations report a negative impact, while 60% of international universities do.

Type of Institution/Organization	“Yes,” Negative Impact	No Impact
U.S. Private College/University	58% (51)	42% (37)
U.S. Public College/University	85% (33)	15% (6)
U.S.-Based Provider Organization	87% (13)	13% (2)
Internationally-Based Provider Organization	62% (8)	38% (5)
International University	60% (6)	40% (4)

Note: Raw numbers in parentheses.

Education Abroad Enrollment

In regard to education abroad enrollment, the survey asked respondents to compare current Fall, 2009 enrollment with Fall, 2008 enrollment. 98 institutions/organizations, or 59% of those responding, report that their education abroad enrollment has decreased from one year ago, while 64 (39%) report that their enrollment has increased. Based on these responses, although the survey did not specifically ask, we can assume that the education abroad enrollment at 3 institutions/organizations (2%) has remained steady compared to a year ago.

Education Abroad Enrollment	Percentage of Institutions/Organizations Reporting
Enrollment Decrease	59% (98)
Enrollment Increase	39% (64)

18% of institutions responding to the survey report a decrease of 1 – 4% in education abroad enrollment; 15% report a decrease of 5-10%; 10% report a decrease of 11-15%; 6% report a decrease of 16-20%; 3% report a decrease of 21-25%; and 9% of institutions/organizations have seen a decline of 26% or more in enrollment.

Enrollment Decrease	Percentage of All Institutions/Organizations Reporting
1 – 4%	18% (29)
5 – 10%	15% (24)
11 – 15%	10% (16)
16 – 20%	6% (10)
21 – 25%	3% (5)
26% or more	9% (14)

64 institutions/organizations (39% of those responding) indicate that their education abroad enrollment has increased over a year ago. Overall, 18% of these institutions/organizations report that enrollment is up between 1-4%; 10% report an increase of 5-10%; 4% report an increase of between 11-15%; 2% have seen an increase of between 16-20%; 2% report an increase of between 21-25%; and 4% of institutions/organizations report enrollment increases of 26% or more compared to a year ago.

Enrollment Increase	Percentage of All Institutions/Organizations Reporting
1 – 4%	18% (29)
5 – 10%	10% (16)
11 – 15%	4% (6)
16 – 20%	2% (4)
21 – 25%	2% (3)
26% or more	4% (6)

The breakdown by institutional/organizational type reveals that U.S.-based education abroad provider organizations and public universities have been impacted the most by the economic crisis and report the biggest decreases in enrollment.

Institutional/Organizational Type	Enrollment Down	Enrollment Up
U.S. Private College/University	49% (43)	49% (43)
U.S. Public College/University	69% (27)	26% (10)
U.S.-Based Provider Organization	87% (13)	7% (1)
Internationally-Based Provider Organization	62% (8)	23% (3)
International University	50% (5)	50% (5)

Note: Percentages do not always add up to 100% because some institutions/organizations reported no increase or decrease in enrollment.

Education Abroad Budgets

99 institutions/organizations, or 60% of those responding, report that education abroad budgets have decreased in the last year. Despite the economic crisis, 27 institutions/organizations (16% of respondents) report that their education abroad budgets have increased in the last year. Based on these responses, although the survey did not specifically ask, we can assume that the education abroad budgets at 40 institutions/organizations (24%) remained unchanged from a year ago.

Education Abroad Budgets	Percentage of Institutions/Organizations Reporting
Budget Decrease	60% (99)
Budget Increase	16% (27)

Overall, 17% of respondents have seen a budget decrease of 1-4%; 27% report a decrease of between 5-10%; 7% report a decrease of between 11-15%; 4% report a decrease of 16-20%; 2% have seen a decrease of 21-25%; and 4% of institutions/organizations report a decrease of 26% or more in their education abroad budget in the last year.

Budget Decrease	Percentage of All Institutions/Organizations Reporting
1 – 4%	17% (28)
5 – 10%	27% (45)
11 – 15%	7% (11)
16 – 20%	4% (6)
21 – 25%	2% (3)
26% or more	4% (6)

Increases in education abroad budgets are reported as follows: 5% of institutions/organizations have seen an increase of between 1-4% in their budget; 8% report between a 5-10% increase; none report increases between 11-15%; 1% (1 institution/organization) report an increase between 16-20%; 1% (2 institutions) report an increase between 21-25%; and 2% of respondents report a budget increase of 26% or more in the last year (4 institutions/organizations).

Budget Increase	Percentage of All Institutions/Organizations Reporting
1 – 4%	5% (8)
5 – 10%	8% (14)
11 – 15%	0% (0)
16 – 20%	1% (1)
21 – 25%	1% (2)
26% or more	2% (4)

The breakdown by institutional/organizational type reveals that U.S. public and private universities and colleges have seen the greatest decreases in their education abroad budgets.

Institutional/Organizational Type	Budget Decreased	Budget Increased
U.S. Private College/University	63% (55)	16% (14)
U.S. Public College/University	77% (30)	10% (4)
U.S.-Based Provider Organization	33% (5)	27% (4)
Internationally-Based Provider Organization	31% (4)	23% (3)
International University	50% (5)	40% (4)

Note: Percentages do not always add up to 100% because some institutions/organizations reported no budget increase or decrease.

Types of Budget Cuts

Institutions and organizations that have seen their education abroad budgets decrease in the last year were asked to indicate where cuts have occurred. The 99 institutions/organizations reporting a decrease in their budgets indicated the cuts detailed on the chart below (respondents were allowed to check all that apply).

Type of Cut	Number Reporting	Percent Reporting (Of All Survey Respondents)
Operating Budget	82	50%
Staff Travel	66	40%
Conference Attendance	55	33%
Staff	29	18%
Student Scholarships	15	9%

A total of 22 institutions/organizations used the “other” category to report other impacts on their education abroad budgets. These included “hiring freezes” (3 institutions; 2% of total); “cuts in memberships in professional organizations” (2 institutions; 1% of total); and cuts in faculty site visits (2 institutions; 1% of total).

Student Choice of Programs

In response to the question, “Are you noticing any changes in students' choice of type of education abroad program because of the financial crisis?” 41% (68) of institutions/organizations answered “yes.” These respondents were asked to explain, and many offered multiple explanations. The responses can be divided this way:

Impact on Student Choice	Number Reporting	Percent Reporting (Of All Survey Respondents)
Choosing less expensive programs	26	16%
Choosing short-term programs	18	11%
Choosing programs in areas of the world that are less expensive	18	11%
Choosing exchange and direct enrollment programs	9	5%
Choosing long-term programs	9	5%
Choosing programs for which institutional aid is portable	4	2%
Choosing programs that offer “extras” (such as excursions) and that are “all inclusive”	3	2%

Other Results

The last question on the survey asked respondents, “Please share anything else about the impact of the economic crisis and its impact on your education abroad operations.” 81 institutions/organizations gave responses to this question, and the ones that were most frequently mentioned are presented in the chart below.

Comment	Number Reporting	Percent of Total Responses
Have been able to absorb budget cuts without impacting operations	7	4%
Other variables are also impacting enrollment (ie, H1N1 virus)	5	3%
Education abroad activity remains strong and expectations remain high, but funding is being cut	4	2%
Full impact of crisis on education abroad will not be seen until next year	3	2%
Institution has capped or limited education abroad enrollment	3	2%
Value of education abroad is being called into question	4	2%

Education Abroad to Australia

Australian Education International (AEI) reported in the survey the latest data related to education abroad to Australia and has given the Forum permission to share the results here. AEI reports: “Compared to last year, Australia has seen a 9% decline in semester-long study abroad enrollment for the fall of 2009, which is most likely due to the financial crisis. Overall, international student enrollment in Australia is up 20% over July 2008.”