
IIE/FORUM ON EDUCATION ABROAD SURVEY OF STUDY ABROAD ENROLLMENTS DURING ACADEMIC YEAR 2009/10

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EXECUTIVE SUMMARY

The Institute of International Education (IIE) and the Forum on Education Abroad joined this year to gather advance data on study abroad enrollments for the 2009/10 academic year to supplement the regular U.S. study abroad data collection conducted through IIE's *Open Doors Report on International Educational Exchange*. This new survey provides the study abroad field with top-line study abroad enrollment trends for the 2009/10 academic year, as well as baseline data on non-credit education abroad and participation by non-U.S. citizens in study abroad programs at U.S. colleges and universities.

Key findings include:

- Study abroad enrollments appear to have rebounded in 2009/10, after a small decline in 2008/09, with 55 percent of respondents reporting increases for 2009/10.
- Study abroad to China continues to increase in popularity, as well as study abroad in other non-traditional destinations, such as the Middle East and Africa.
- Students are increasingly choosing shorter programs, less expensive programs and programs on which their financial aid can be used.
- 52 percent of respondents reported students from their institution participated in non-credit education abroad.
- Study abroad budgets increased for a higher proportion of respondents than in the previous year, and fewer respondents reported budget declines,
- Respondents report forming new foreign and domestic partnerships to increase study abroad enrollments.

ABOUT THE SURVEY

The Institute of International Education, an independent nonprofit founded in 1919, is among the world's largest and most experienced international education and training organizations. IIE published the annual *Open Doors Report on International Educational Exchange*, the only long-standing, comprehensive information resource on international higher education exchange activity into and out of the U.S.

The Forum on Education Abroad is a global membership association of over 450 institutions and organizations that together represent approximately 90 percent 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.

IIE and the Forum surveyed its member institutions to assess whether study abroad enrollments had rebounded during the 2009/10 academic year, after declining slightly in 2008/09, during the height of the global economic crisis. Respondents were also asked additional questions on topics not included in the regular *Open Doors* U.S. Study Abroad data collection, including participation in non-credit education abroad and participation by non-U.S. citizens in study abroad programs at U.S. colleges and universities, as well as questions on institutional changes in the study abroad budget and staffing. The online survey was conducted from October 1-15, 2010.

RESPONDENT PROFILE

238 IIE Network and Forum member institutions responded.¹ The majority of respondents (85 percent) were U.S. four-year colleges and universities, with two-year colleges, specialized institutions, independent program providers and non-U.S. institutions also being represented. About 42 percent of respondents (101 institutions) were public and 58 percent (137) were private. The breakdown by institutional type is given below.

Type of Institution	Number of Respondents	Percent of Total
Doctorate Institutions	82	34.5%
Master's Institutions	61	25.6%
Baccalaureate Institutions	60	25.2%
Associate's Institutions	18	7.6%
Specialized Institutions	2	0.8%
Independent Program Provider	11	4.6%
Other (non-U.S. institutions)	4	1.7%
Total	238	100.0%

The largest proportion (47 percent) of responding institutions were small institutions, with a total enrollment of 5,000 students or less. The breakdown by institutional size is given below.

¹ Due to institutional overlap in IIE Network and Forum memberships, a response rate could not be calculated.

Size of Institution	Number of Respondents	Percent of Total
1,000 students or less	9	3.8%
1,001-5,000 students	102	43.2%
5,001-10,000 students	41	17.4%
10,001-20,000 students	32	13.6%
Over 20,000 students	52	22.0%
Total	235	100.0%

Survey respondents tended to send relatively large numbers of students abroad, with 75 percent of respondents reporting having over 100 students from their institution receive credit for study abroad during the 2009/10 academic year. The breakdown by total number of study abroad students in 2009/10 is given below.

2009/10 Study Abroad Total	Number of Respondents	Percent of Total
0 students	2	0.9%
1-50 students	32	14.2%
51-100 students	23	10.2%
101-500 students	105	46.5%
501-1,000 students	41	18.1%
Over 1,000 students	23	10.2%
Total	226	100.0%

SURVEY RESULTS

Study Abroad Enrollments

The survey asked respondents to compare study abroad enrollment in 2009/10 with their institution's study abroad enrollments for the previous year (2008/09). The majority (55 percent) of respondents reported that there had been an increase in study abroad enrollment at their institution in 2009/10, with 31 percent reporting an increase of less than 10 percent, 17 percent reporting an increase of 10-25 percent and 7 percent reporting an increase of over 25 percent. A breakdown is given below.

Study Abroad Enrollment Change from 2008/09	Number of Respondents	Percent of Total
Increase of more than 25%	17	7.1%
Increase of 10-25%	41	17.2%
Increase of less than 10%	74	31.1%
No change	29	12.2%
Decline of less than 10%	50	21.0%
Decline of 10-25%	20	8.4%
Decline of more than 25%	7	2.9%
Total	238	100.0%

A much higher percentage of respondents (55 percent) indicated increases in study abroad enrollment in 2009/10 compared to similar data from the Forum on Education Abroad's *Survey on the Impact of the Global Economic Crisis on Education Abroad* (September 2009), in which only 39 percent of respondents (64 institutions/ organizations) indicated an increase during academic year 2008/09.

Furthermore, far fewer respondents (32 percent) indicated that their study abroad enrollments had declined in 2009/10, compared to similar data from the Forum's 2009 survey, in which 59 percent of respondents (98 institutions/organizations) indicated an enrollment decline for 2008/09.

Taken together, these data indicate that study abroad enrollments have likely rebounded during the 2009/10 academic year, following the small overall decline seen in 2008/09.²

Private institutions were somewhat more likely to report increases than public institutions and also less likely to report declines: 57 percent of private institutions reported increases in study abroad enrollment in 2009/10, compared to 53 percent of public institutions; while 37 percent of public institutions reported declines, as compared with 30 percent of private institutions.

However, public institutions were more likely than private institutions to report increases of more than 25 percent; private institutions being much more likely than public institutions to report increases of less than 10 percent. The breakdown by sector is given below.

Public Institutions	Number of Respondents	Percent of Total
Increase of more than 25%	11	10.9%
Increase of 10-25%	21	20.8%
Increase of less than 10%	21	20.8%
No change	11	10.9%
Decline of less than 10%	23	22.8%
Decline of 10-25%	10	9.9%
Decline of more than 25%	4	4.0%
Total	101	100.0%

Private Institutions	Number of Respondents	Percent of Total
Increase of more than 25%	6	4.4%
Increase of 10-25%	21	15.3%
Increase of less than 10%	51	37.2%
No change	18	13.1%
Decline of less than 10%	28	20.4%
Decline of 10-25%	10	7.3%
Decline of more than 25%	3	2.2%
Total	137	100.0%

² According to IIE's *Open Doors 2010 Report on International Educational Exchange*, the number of U.S. students receiving academic credit for study abroad in 2008/09 declined 0.8% to 260,327 in 2008/09.

The Forum 2009 survey reported that public institutions had seen the most declines in study abroad enrollment in 2008/09, with 69 percent of public colleges and universities reporting declines in 2008/09 and only 26 percent reporting increases. In comparison, survey findings for 2009/10 show that 27 percent more public institutions reported increases this year, and 32 percent fewer institutions reported declines, indicating that the overall decline seen in 2008/09 has most likely been reversed among public institutions. Among private institutions, the same proportion saw increases and declines in 2008/09 (49 percent each), with the 2009/10 findings showing an eight percent increase in the proportion of private institutions reporting increases in study abroad enrollment in 2009/10, and a 19 percent decline in the proportion of private institutions reporting drops in study abroad enrollment for 2009/10.

Study Abroad Destinations

Among the study abroad destinations included in this survey, China saw the largest number of increases in 2009/10, continuing the trend of increases in study abroad to China seen in the last few years. Compared to the previous year, 54 percent of respondents reported increases in study abroad to China in 2009/10, 33 percent reported no change and 13 percent reported declines. Other Asian destinations also saw increases, with 49 percent of respondents reporting increases in study abroad to Asia (excluding China), 42 percent reporting no change and only 9 percent reporting declines. Detailed breakdowns are given below.

Study abroad to the Middle East and North Africa (MENA) has expanded over the past few years, as non-traditional destinations become more popular for U.S. study abroad. In 2009/10, 41 percent of respondents reported increases in study abroad to the MENA region, 46 percent reported no change from the previous year and 13 percent reported declines. Breakdowns by destination are given below.

Enrollment Change from 2008/09	China		Other Asian Countries		Middle East/ North Africa	
	Total	Percent	Total	Percent	Total	Percent
Increase of more than 25%	23	11.7%	11	5.9%	20	12.4%
Increase of 10-25%	22	11.2%	17	9.2%	4	2.5%
Increase of less than 10%	62	31.5%	63	34.1%	42	26.1%
No change	64	32.5%	78	42.2%	74	46.0%
Decline of less than 10%	9	4.6%	7	3.8%	8	5.0%
Decline of 10-25%	6	3.0%	5	2.7%	5	3.1%
Decline of more than 25%	11	5.6%	4	2.2%	8	5.0%
Total	197	100.0%	185	100.0%	161	100.0%

Europe is the region hosting the largest number of U.S. study abroad students – 55% in 2008/09, according to *Open Doors 2010*. Compared to the previous year, 40 percent of respondents reported no change in study abroad enrollment to Western Europe in 2009/10, 39 percent reported increases and 21 percent reported declines. For destinations in Eastern Europe, 48 percent of respondents reported no change, 31 percent reported increases and 21 percent reported declines. The breakdown is given below.

Australia has also been a top destination for U.S. study abroad, with over 11,000 Americans studying abroad in Australia each year, according to IIE's *Open Doors Report*. In 2009/10, 46 percent of respondents reported no change in study abroad to Australia compared to the previous year, 26 percent reported increases and 28 percent reported declines. The detailed breakdown is given below.

Enrollment Change from 2008/09	Western Europe		Eastern Europe		Australia	
	Total	Percent	Total	Percent	Total	Percent
Increase of more than 25%	15	7.0%	10	5.6%	8	4.2%
Increase of 10-25%	26	12.2%	10	5.6%	11	5.8%
Increase of less than 10%	42	19.7%	35	19.4%	30	15.9%
No change	85	39.9%	87	48.3%	87	46.0%
Decline of less than 10%	31	14.6%	22	12.2%	27	14.3%
Decline of 10-25%	8	3.8%	8	4.4%	11	5.8%
Decline of more than 25%	6	2.8%	8	4.4%	15	7.9%
Total	213	100.0%	180	100.0%	189	100.0%

In 2008/09, due to the outbreak of the H1N1 virus, study abroad to Mexico declined by 26 percent, while study abroad to South America increased by 13 percent. Data from this survey indicate that these trends continued in 2009/10, with 38 percent of respondents indicating that study abroad to Mexico had declined compared to the previous year, 43 percent reporting no change and 19 percent reporting increases. For Central and South America, 46 percent of respondents reported increases, 34 percent reported level enrollments and 21 percent reported declines. The detailed breakdown is given below.

Study abroad to Sub-Saharan Africa has been growing in popularity over the past several years, in line with the general trend of more study abroad to non-traditional destinations. In 2009/10, 36 percent of respondents reported increases in study abroad to Sub-Saharan Africa compared to the previous year, 48 percent reported no change and 16 percent reported declines. The detailed breakdown is given below.

Enrollment Change from 2008/09	Mexico		Central/South America		Sub-Saharan Africa	
	Total	Percent	Total	Percent	Total	Percent
Increase of more than 25%	6	3.5%	13	6.3%	13	7.8%
Increase of 10-25%	7	4.1%	24	11.7%	11	6.6%
Increase of less than 10%	19	11.1%	57	27.7%	36	21.7%
No change	74	43.3%	70	34.0%	80	48.2%
Decline of less than 10%	27	15.8%	24	11.7%	12	7.2%
Decline of 10-25%	13	7.6%	9	4.4%	5	3.0%
Decline of more than 25%	25	14.6%	9	4.4%	9	5.4%
Total	171	100.0%	206	100.0%	166	100.0%

Study Abroad Program Length

According to the *Open Doors Report*, most Americans study abroad on short-term programs (summer programs or programs of eight weeks or less); 55 percent of U.S. study abroad students participated in short-term programs in 2008/09. In 2009/10, Americans continued to choose short-term programs in large numbers, with over one quarter (26 percent) of respondents reporting that short-term programs comprised over 65 percent of their institution's total study abroad enrollment and 45 percent reporting that short-term programs comprised between 25 and 65 percent of their total study abroad enrollment.

Semester-long programs also remain very popular. About 23 percent of respondents reported that semester programs comprised over 65 percent of total study abroad enrollment at their institution in 2009/10, and 42 percent reported that semester programs comprised between 25 and 65 percent of total study abroad.

Year-long programs comprised approximately four percent of total U.S. study abroad activity in 2008/09 (*Open Doors 2010*). In 2009/10, 56 percent of respondents reported that academic year programs comprised between one and five percent of total study abroad enrollment at their institution. A detailed breakdown is given below.

Percent of Total Study Abroad Enrollment	Short-term Programs		Semester Programs		Academic Year Programs	
	Total	Percent	Total	Percent	Total	Percent
0%	11	4.8%	13	5.6%	50	21.8%
1-5%	21	9.2%	26	11.2%	128	55.9%
6-15%	18	7.9%	22	9.4%	26	11.4%
16-25%	17	7.4%	20	8.6%	8	3.5%
26-35%	27	11.8%	26	11.2%	2	0.9%
36-50%	34	14.8%	39	16.7%	5	2.2%
51-65%	42	18.3%	33	14.2%	3	1.3%
More than 65%	59	25.8%	54	23.2%	7	3.1%
Total	229	100.0%	233	100.0%	229	100.0%

Non-Credit Education Abroad Enrollments

Data on non-credit education abroad is often difficult to collect due to the inability of institutions to accurately track non-credit-bearing activity. For this survey, respondents were asked to estimate the number of students at their institutions who participated in a non-credit education abroad activity, such as an international internship, volunteer abroad experience or other co-curricular activity in 2009/10. While ten percent of respondents reported no non-credit education abroad activity at their institution, the majority of respondents (51 percent or 122 institutions) reported that their students did participate in non-credit education abroad, with 16 institutions reporting that over 100 of their students had participated in a non-credit education abroad activity in 2009/10. Due to the difficult nature of tracking this data, 39 percent of respondents indicated that they did not know how many students at their institution participated in non-credit education abroad in 2009/10.

Participation in Non-Credit Education Abroad

	Number of Respondents	Percent of Total
0 students	23	9.7%
1-20 students	58	24.6%
21-50 students	23	9.7%
51-100 students	25	10.6%
More than 100 students	16	6.8%
Don't know	91	38.6%
Total	236	100.0%

International Students Studying Abroad

Survey respondents were asked what proportion of their study abroad enrollments international students (non-U.S. citizens or permanent residents) comprised. The majority (57 percent) of respondents reported that international students constituted between one and five percent of total study abroad enrollment, 21 percent indicated that they had no international students participate in study abroad at their institution and 10 percent indicated that international students comprised more than five percent of total study abroad enrollment. The breakdown is given below.

Percent of Total Study Abroad Enrollment

	Number of Respondents	Percent of Total
0%	51	21.4%
1-5%	135	56.7%
6-10%	15	6.3%
More than 10%	8	3.4%
Total	238	100.0%

Changes to Study Abroad Budgets

Almost half (46 percent) of responding institutions reported that their study abroad budget had not changed between 2008/09 and 2009/10. About one-third (34 percent) reported that their study abroad budget had declined, and about one-fifth (21 percent) reported that their study abroad budget had increased in 2009/10. A detailed breakdown is given below.

Change to Study Abroad Budget	Number of Respondents	Percent of Total
Substantial increase (more than 15%)	7	3.3%
Increase (5-15%)	23	10.7%
Slight increase (less than 5%)	14	6.5%
About the same as last year	98	45.6%
Slight decline (less than 5%)	29	13.5%
Decline (5-15%)	29	13.5%
Substantial decline (more than 15%)	15	7.0%
Total	215	100.0%

While more institutions still reported declines in their study abroad budget than reported increases, compared to data for the previous year from the Forum 2009 survey, a higher proportion reported that their budgets increased, and fewer reported that their budgets had declined. Sixty percent of respondents to the Forum survey (99 institutions/organizations) reported that their budgets had declined in 2008/09, while only 16 percent (27 respondents) reported increases.

Both public and private institutions reported more declines than increases in their study abroad budgets for 2009/10, with public institutions more likely to report declines than private institutions (40 percent vs. 30 percent, respectively). Only 13 percent of public institutions reported budget increases in 2009/10, as compared with 25 percent of private institutions. The detailed breakdown is given below.

Public Institutions	Number of Respondents	Percent of Total
Substantial increase (more than 15%)	1	1.2%
Increase (5-15%)	8	9.4%
Slight increase (less than 5%)	2	2.4%
No change	40	47.1%
Slight decline (less than 5%)	11	12.9%
Decline (5-15%)	10	11.8%
Substantial decline (more than 15%)	13	15.3%
Total	85	100.0%

Private Institutions	Number of Respondents	Percent of Total
Substantial increase (more than 15%)	4	3.3%
Increase (5-15%)	15	12.3%
Slight increase (less than 5%)	11	9.0%
No change	55	45.1%
Slight decline (less than 5%)	16	13.1%
Decline (5-15%)	18	14.8%
Substantial decline (more than 15%)	3	2.5%
Total	122	100.0%

Types of Budget Cuts

Respondents were asked to indicate what type of budget cuts they experienced. The largest proportion (26 percent) reported cuts in operating budget, followed by staff travel (20 percent) and conference attendance (19 percent). A detailed breakdown is given below. Since respondents could select all that applied, percentages do not total 100 percent.

As compared with data from 2008/09, a much smaller proportion of respondents reported budget cuts in all areas, in line with the general finding that fewer institutions suffered budget cuts in 2009/10.

Types of Budget Cut	Number of Respondents	Percent of Total Respondents
Operating budget	62	26.1%
Staff travel	47	19.7%
Conference attendance	44	18.5%
Staff	19	8.0%
Student scholarships	18	7.6%
Other	2	0.8%

Changes in Student Choice of Programs

Respondents were asked if they had noticed any changes in students' choice of the type of study abroad programs they enrolled in due to the financial crisis. Over 40 percent of respondents indicated that students at their institution were more likely to choose short-term programs, less expensive programs, and programs where institutional financial aid is portable. The breakdown is given below. Since respondents could select all that applied, percentages do not total 100 percent.

Student Choice	Number of Respondents	Percent of Respondents
Choosing short-term programs	110	46.2%
Choosing less expensive programs	107	45.0%
Choosing programs where financial aid is portable	103	43.3%
Choosing less expensive regional destinations	78	32.8%
Choosing exchange or direct enrollment programs	61	25.6%
Choosing programs that offer 'extras' or are 'all inclusive'	37	15.5%
Choosing long-term programs	13	5.5%

Compared to data from the previous year, institutions are reporting that students seem to be choosing short-term programs, less expensive programs, and programs where institutional aid is portable in much greater numbers than in 2008/09.

Steps Taken by Institutions to Increase Study Abroad Enrollments

Respondents were asked if they had taken any special steps to increase study abroad enrollments in 2009/10. Many institutions reported having developed new partnerships with either foreign or domestic institutions and programs (29 percent and 17 percent, respectively). Institutions reported focusing on Europe (65 institutions), Asia (50 institutions), China (34 institutions), Latin America (33 institutions), the Middle East (20 institutions), Africa (19 institutions) and Oceania (6 institutions).

Institutions also hired more staff or devoted more staff time to study abroad programs (18 percent) and spent additional funds on marketing and promotion of study abroad programs (14 percent). Nine percent reported taking other steps such as increasing the number of study abroad scholarships available and increasing program offerings, including adding lower cost or shorter programs. 14 percent reported that they did not take any of the steps mentioned.

The breakdown is given below. Since respondents could select all that applied, percentages do not total 100 percent.

Steps Taken	Number of Respondents	Percent of Respondents
New foreign partnerships	109	28.5%
New staff or additional staff time	67	17.5%
New domestic partnerships	65	17.0%
New funding for marketing	53	13.9%
Other (scholarships, etc.)	34	8.9%
None of the above	54	14.1%

CONCLUSION

Data from the current survey show that study abroad enrollments appear to have rebounded during academic year 2009/10, with more institutions increases than in the previous year, and fewer institutions reporting declines. Study abroad to China and other Asian countries continues to increase, with many institutions developing partnerships with institutions and programs in those countries. Study in other non-traditional destinations also continues to increase in popularity.

The Institute of International Education has been working with our partners to increase the number and diversity of American students who go abroad and to encourage study in places of growing strategic importance to the United States. Programs such as the Gilman International Scholarship Program, the Fulbright U.S. Student Program and the National Security Education Program Boren Scholarships that IIE administers for the U.S. Government and other sponsors prepare a new generation for global citizenship. However, with a total higher education enrollment of over 19 million, there remains a huge unmet need to expand American students' international experience, and an even greater challenge to ensure that access to study abroad is available to all, including students of diverse backgrounds, low incomes and underrepresented fields of study.

Appendix A: IIE Online Resources for U.S. Study Abroad

StudyAbroadFunding.org – database of study abroad scholarships and grants

IIEPassport.org – online search engine of over 900 study abroad programs

IIE.org – homepage for the Institute of International Education and its over 250 programs

IIE.org/opendoors – *Open Doors* data on U.S. student mobility and trends

IENetwork.org – online resource for IIE members, including publications, best practices, etc.

IIEBooks.org – IIE's online bookstore

Appendix B: Forum on Education Abroad Online Resources for U.S. Education Abroad

www.forumea.org/standards-index.cfm – Standards of Good Practice for Education Abroad

www.forumea.org/standards-toolbox.cfm – best practice resources for Forum members

www.forumea.org/ – homepage of the Forum on Education Abroad
