This survey sampled 480 institutions during the month of October 2004 and was conducted jointly by NAFSA: Association of International Educators, the Association of American Universities (AAU), the National Association of State Universities and Land-Grant Colleges (NASULGC), the Institute of International Education (IIE), and the Council of Graduate Schools (CGS).

INTERNATIONAL UNDERGRADUATE STUDENT ENROLLMENT

New International Undergraduate Student Enrollment
431 institutions responded to this question about new international undergraduate enrollments at U.S. higher education institutions for fall 2004, as compared to fall 2003

- 38% reported a decline, 35% reported an increase, and 24% reported level enrollments.
- Of the responding Doctoral/Research institutions that each enroll more than 2500 international students (28 institutions), 39% reported declines, 43% reported increases, and 18% reported level enrollments compared to last year.

Continuing International Undergraduate Student Enrollment
404 institutions responded to this question about continuing international undergraduate enrollments at U.S. higher education institutions for fall 2004, as compared to fall 2003

- 44% reported a decline, 16% reported an increase, and 41% reported level enrollments.
- Of the responding Doctoral/Research institutions that each enroll more than 2500 international students (28 institutions), 54% reported declines, 32% reported increases, and 14% reported level enrollments compared to last year.

New & Continuing International Undergraduate Student Enrollment Combined

- When those institutions that indicated a decline in either new or continuing international undergraduate student enrollments were asked to indicate the top factor contributing to the decrease:
  - 40% noted visa troubles – both delays in issuance and denials
  - 20% noted a decrease in number of applications
- When asked about undergraduate enrollments from various countries of origin, most schools indicated there was no noticeable change from fall 2003. However, for the following countries, the gap between schools indicating a decrease in enrollments and those indicating an increase was a bit more pronounced: India (24% indicated decreases; 15% increases; 53% level); Indonesia (20% decreases; 7% increases; 61% level); Pakistan (20% decreases; 7% increases; 63% level); and Saudi Arabia (14% decreases; 6% increases; 69% level). Korea was the only country with notably more schools indicating an increase (28%) than a decrease (15%).
INTERNATIONAL GRADUATE STUDENT ENROLLMENT

New International Graduate Student Enrollment
253 institutions responded to this question about new international graduate enrollments at U.S. higher education institutions for fall 2004, as compared to fall 2003.

- 74% reported level or declining enrollments by new graduate students. 48% reported a decline, 26% reported level enrollments, and 23% reported an increase.
- Of the responding Doctoral/Research institutions that each enroll more than 2500 international students (26 institutions), 65% reported declines, 23% reported increases, and 12% reported level enrollments compared to last year.

Continuing International Graduate Student Enrollment
246 institutions responded to this question about continuing international graduate enrollments at U.S. higher education institutions for fall 2004, as compared to fall 2003.

- 37% reported a decline, 14% reported an increase, and 43% reported level enrollments.
- Of the responding Doctoral/Research institutions that each enroll more than 2500 international students (27 institutions), 56% reported declines, 25% reported increases, and 11% reported level enrollments compared to last year.

New & Continuing International Graduate Student Enrollment Combined

- When those institutions that indicated a decline in either new or continuing international graduate student enrollments were asked to indicate the top factor contributing to the decrease:
  - 47% noted a decrease in number of applications
  - 29% noted visa troubles – both delays in issuance and denials
- Many Doctoral/Research schools noted decreases in graduate enrollments in the fields of engineering and business, while enrollments in the biological sciences appear to have increased.
  - Of those responding, 40% indicated they had experienced decreases in graduate engineering enrollments, while only 18% had experienced increases. Another 20% had level enrollment numbers in engineering.
  - For business, 37% responded that they had experienced decreases, 20% had increases, and 24% had level enrollments in the field.
  - Graduate enrollments in the biological sciences appear to have increased: 31% indicated increases, 29% indicated level enrollments, and only 20% indicated decreases.
  - Enrollments in other fields were relatively level.
- More Doctoral/Research schools experienced declines than experienced increases or steady numbers for graduate enrollments from China (44% indicated decreases; 32% increases, 19% level), India (46% indicated decreases; 32% increases, 16% level), and Korea (38% indicated decreases; 30% increases, 26% level). With regard to enrollments from other countries of origin, more of these respondents indicated level enrollments than increases or decreases.
MISSED START DATES DUE TO VISA DELAYS

International Undergraduate Students

- Among 244 institutions responding regarding the number of new international undergraduate students who missed their start dates in fall 2004 compared to fall 2003:
  - 34% had an increase
  - 9% had the same number of students missing start dates this year as last
  - 27% had a decrease
  - 30% had no new international undergraduate students miss start dates due to visa delays either year
  - Overall, results showed a 2% increase in missed start dates for new international undergraduate students.
  - For the 15 responding schools enrolling more than 2500 international students, there was a 48% decrease in such missed starts.

- Among 209 institutions responding regarding the number of continuing international undergraduate students who missed their start dates in fall 2004 compared to fall 2003:
  - 14% had an increase
  - 4% had the same number of students missing start dates this year as last
  - 19% had a decrease
  - 63% had no continuing international undergraduate students miss start dates due to visa delays either year
  - Overall, results showed a 4% decrease in missed start dates for continuing international undergraduate students.
  - For the 12 responding schools enrolling more than 2500 international students, there was a 49% decrease.

International Graduate Students

- Among 136 institutions responding regarding the number of new international graduate students who missed their start dates in fall 2004 compared to fall 2003:
  - 26% had an increase
  - 11% had the same number of students missing start dates this year as last
  - 32% had a decrease
  - 31% had no new international graduate students miss start dates due to visa delays either year
  - Overall, results showed a 9% decrease in missed start dates for continuing international undergraduate students.
  - For the 18 responding schools enrolling more than 2500 international students, there was a 61% decrease.

- Among 88 institutions responding regarding the number of continuing international graduate students who missed their start dates in fall 2004 compared to fall 2003:
  - 11% had an increase
  - 5% had the same number of students missing start dates this year as last
  - 15% had a decrease
  - 69% had no new international graduate students miss start dates due to visa delays either year
  - Overall, results showed a 6% increase in missed start dates for continuing international undergraduate students.
  - For the 9 responding schools enrolling more than 2500 international students, there was a 5% increase.