

IIE Center for Academic Mobility
Research and Impact



Fall 2019 International Student Enrollment Snapshot Survey

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Introduction

The 2019 Fall International Student Enrollment Snapshot Survey Report (henceforth, Snapshot Survey) provides the international education field with a timely look at current patterns in international student enrollment as of fall 2019 (2019/20 academic year) based on the responses of more than 500 U.S. higher education institutions. The report is released jointly with and complements *Open Doors 2019*, which provides a comprehensive view of international student enrollment from the previous year (2018/19). As the Snapshot Survey represents a subset of the more than 2,800 institutions surveyed by *Open Doors*, the full picture of 2019/20 enrollment will be analyzed in *Open Doors 2020* (November 2020).

Key findings

The findings of the 2019 Fall Snapshot Survey align with those of *Open Doors 2019*, particularly in new enrollments of international students.

New enrollment of international students in the United States

- Higher education institutions reported a 0.9 percent decrease in the number of international students enrolling for the first time at a U.S. institution, identical to the new enrollment decline in fall 2018 (0.9 percent decline, Institute of International Education (IIE), 2019). This represents a flattening of previous years' declines.
- Among responding colleges and universities, 42 percent of institutions reported an increase in new international student enrollment, 7 percent indicated the number was the same as last year, and 51 percent reported a decrease.
- New enrollment varied based on institutional characteristics and geographic regions. Overall, doctoral universities reported an increase in new enrollment, while master's institutions and colleges and universities in the Midwest reported decreases.

Total international students in the United States

- The total number of enrolled students (undergraduate, graduate, and non-degree students) decreased by 1.6 percent. This indicates an improvement over the prior year, when international student enrollment fell by 2.1 percent (IIE, 2019).
- The number of international students pursuing employment opportunities following their academic studies on Optional Practical Training (OPT) continued to increase (+2.1 percent), though at a slower rate than in previous years.
- The total number of international students in the United States (enrolled and OPT) decreased by 0.9 percent. This number is affected by new enrollment declines from previous years and the flattening of OPT increases since the change in the science, technology, engineering and mathematics (STEM) OPT extension policy in 2016.

Institutions remain concerned about attracting international students globally and continue to focus on recruitment overseas and within the United States

- Institutions continued to prioritize international student outreach and recruitment to include China (58 percent), Vietnam (50 percent), and India (45 percent).
- 59 percent of institutions reported focusing recruitment efforts on international students already in the United States, including international high school students and those attending community colleges.

- Institutions reported leveraging the knowledge of current international students on campus (59 percent), the EducationUSA network (53 percent), and alumni (47 percent) to build recruitment pipelines.

Methodology

Survey background and data collection

Ten partnering higher education associations distributed the Snapshot Survey in late September and early October 2019 to their member institutions across the United States. The survey was carried out by IIE in cooperation with American Association of Collegiate Registrars and Admissions Officers, American Association of Community Colleges, American Association of State Colleges and Universities, American Council on Education, Association of Public and Land-grant Universities, College Board, Council of Graduate Schools, National Association for College Admission Counseling, and NAFSA: Association of International Educators.

The survey captured 509 valid responses from higher education institutions throughout the United States. Not all respondents provided complete data. As a result, valid item response rates were lower for some questions. The 2019 Snapshot Survey sample represents a subset of the 2,800 higher education institutions surveyed as part of the *Open Doors International Student Census*.

Respondent profile

Respondents to the 2019 Snapshot Survey reflected a broad range of institutional types and locations from across 48 states, two U.S. territories, and the District of Columbia. Overall, the profile of the Snapshot Survey respondents closely mirrored the profile of institutions that completed the *Open Doors 2019 International Student Census*. Similar proportions were noted among geographic regions, institutional sector, type, and size. Based on institutional size and the five broad Carnegie classifications of institutional types, large doctoral institutions were overrepresented in the Snapshot Survey.

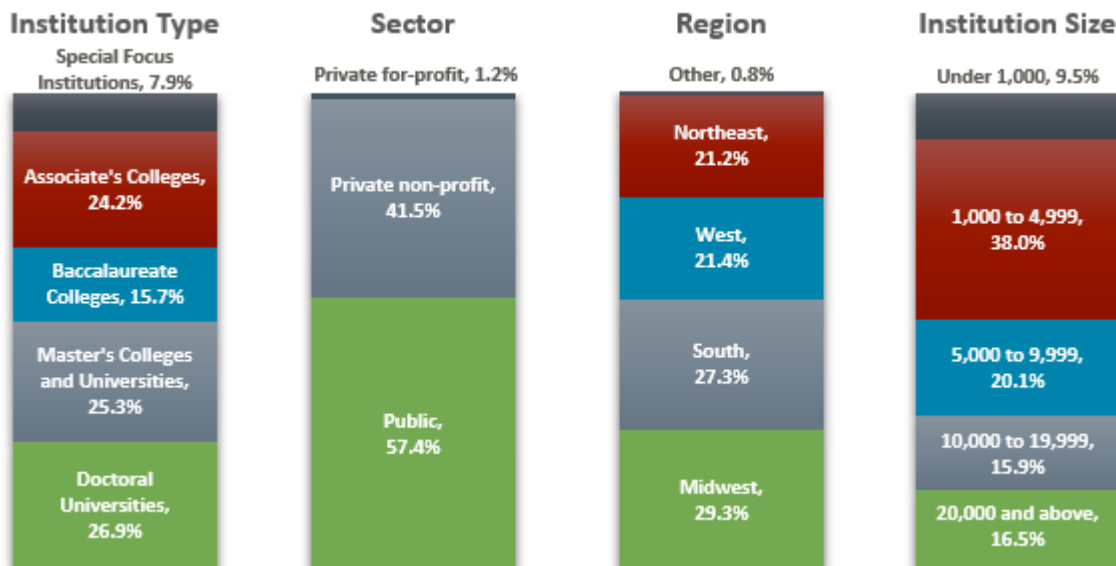


Figure 1: Snapshot Survey sample representation

Changes in total and new international enrollment

New enrollment of international students is stabilizing

New international student enrollment continues to be closely monitored in the *Open Doors* reporting, which has tracked comprehensive information on international students enrolling for the first time at a U.S. college or university for more than a decade. According to *Open Doors* (IIE, 2019), following several years of falling new enrollment numbers in 2016 and 2017,¹ institutions reported a leveling off to a modest 0.9 percent decline in fall 2018, likely due to extensive efforts that U.S. higher education institutions are making to attract and welcome international students to their campuses.

In the Snapshot Survey, institutions reported a 0.9 percent decrease in new student enrollment, identical to the decline observed in the *Open Doors 2019*.

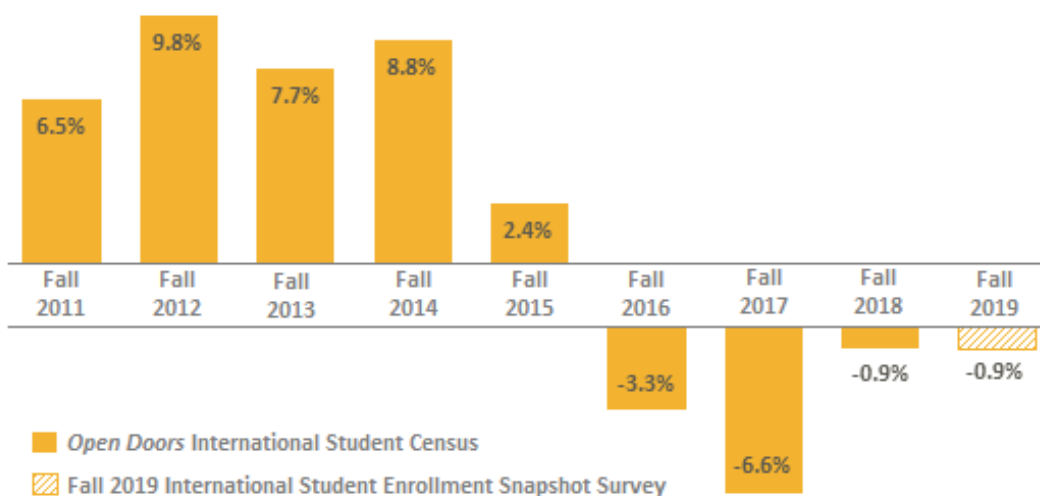


Figure 2: Changes in new international student enrollments, 2011-2019

Among reporting institutions, total international student enrollment (undergraduate, graduate, and non-degree students) decreased by 1.6 percent. This indicates an improvement over the prior year when international student enrollment fell by 2.1 percent (IIE, 2019) but would continue the trend of enrollment declines into the third year. The overall number of international students (enrolled and OPT) fell by 0.9 percent. This number is affected by new enrollment declines from previous years. Among reporting institutions to the Snapshot Survey, OPT continued to grow (+2.1 percent), a trend that began with a change in the STEM OPT extension policy in 2016, which allowed international students majoring in the STEM fields to stay in the United States for up to 36 months pursuing practical work experience, though growth in 2019 was at a slower rate than in previous years.

New international student enrollments vary

New enrollment varied based on institutional characteristics and geographic regions. While the number of new international students fell nationally, institutional responses varied, with 42 percent of institutions reporting an increase in new international student enrollment, 7 percent indicating the number to be the same as last year, and 51 percent of institutions reporting a decrease.

¹ The number of new international students began to shift in Fall 2015, with growth dropping from 8.8 percent in 2014 to 2.4 percent the following academic year.

The U.S. higher education system constitutes a full array of institutional types, sectors, and programs of expertise. As such, shifting trends in new international student enrollments affects colleges and universities differently based on institutional characteristics and geographic regions.

Private not-for-profit institutions reported a slight increase in new international student enrollment (+0.9 percent), while public institutions reported a 2.0 percent drop. Differences in enrollment patterns also varied by institutional type. Responding doctorate-granting universities had an increase in new enrollment (+0.8 percent), while master's (-14.0 percent), associate's (-0.8 percent), and baccalaureate (-2.4 percent) institutions reported declines.

New international student enrollment patterns also differed geographically across the top host states and U.S. regions. Among the top four host states of international students, the coastal states of California, New York, and Massachusetts remained relatively stable, while continued declines were reported in the numbers of students attending institutions in Texas.

To better understand trends throughout the United States, new enrollment was classified by each of the broad U.S. Census Bureau divisions.² Across the four U.S. geographic areas, institutions located in the Northeast (+0.6 percent) and West (+0.2 percent) reported slight increases. The Midwestern region continued to see declines in new enrollment, in line with total international student trends reported in *Open Doors 2019*, as did the South (-1.5 percent).

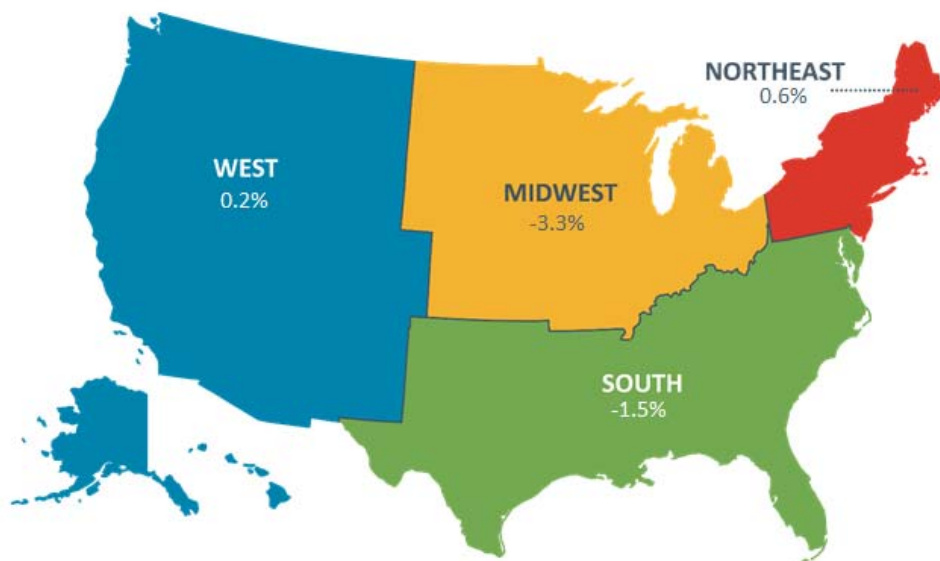


Figure 3: Change in new enrollment by U.S. geographic region

Shifting reasons for declining enrollment

Among institutions experiencing declining new enrollment, many institutional administrators reported similar reasons for falling international student numbers from fall 2018 to fall 2019. An overwhelming majority of institutions (95.3 percent) indicated that *multiple* factors contributed to falling new student enrollment numbers. Institutions continued to cite visa application issues or delays/denials, the increasingly competitive global market of higher education options, the social and political environment, and the costs of U.S. higher education as the leading factors contributing to declines in new enrollment.

² Based on U.S. Census divisions. For more information about states within each region, see https://www2.census.gov/geo/pdfs/maps-data/maps/reference/us_regdiv.pdf.

Visa concerns

Survey respondents listed visa application process issues or delays/denials as the top reason for fall 2019 drops in new enrollment. The proportion of institutions citing this factor grew from 68.4 percent in fall 2017 to 86.9 percent in fall 2019. Even among institutions that reported that their new enrollment had increased or stayed the same, visa issues remained the top issue when asked about factors that may be affecting their institution (81.5 percent).

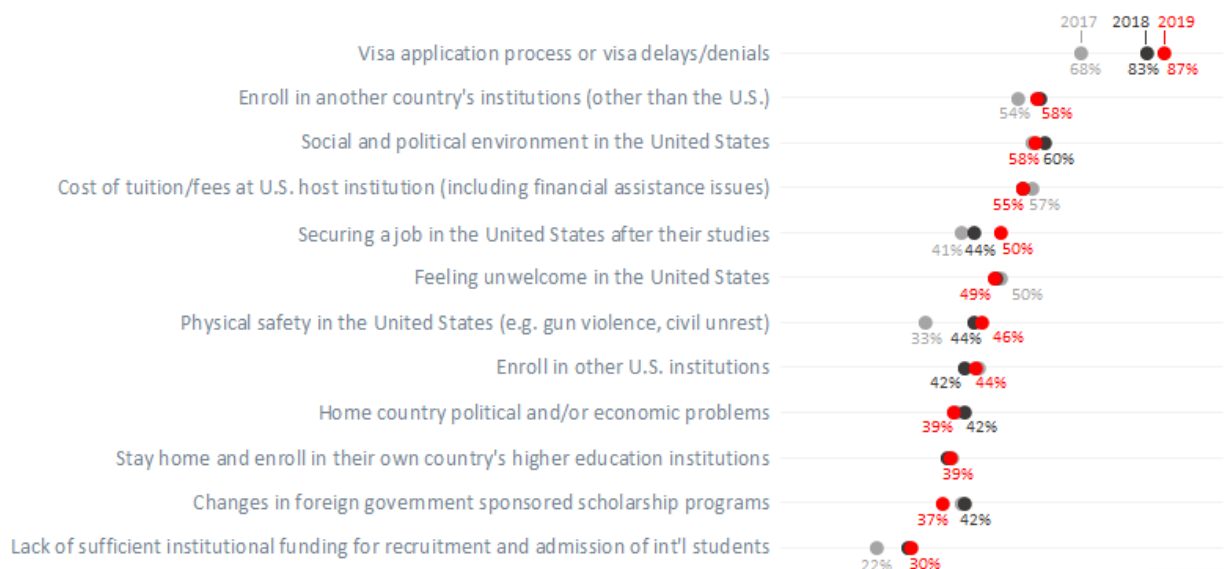


Figure 4: Top 12 reasons for declining international enrollments, fall 2017 to fall 2019

Global competition

Among institutions with new enrollment declines, more than half (58.4 percent) of the colleges and universities cited that students are deciding to enroll in another country's higher education institution outside of their home country. This is the first time since this Snapshot Survey began in 2005 that global competition was listed among the top two reasons for institutional declines. Several colleges and universities specifically noted recruitment efforts by Canadian institutions and government to international students in the United States.

Social and political climate

Institutions continued to report that the U.S. social and political environment (57.9 percent) and feeling unwelcome in the United States (48.6 percent) were factors contributing to new international student declines, though the percentages were slightly lower than in the 2018 Snapshot Survey. In addition, institutions reported that concerns about physical safety in the United States remained a factor contributing to declining enrollments (45.8 percent). Institutions noted that the combination of political rhetoric and personal safety continued to cause hesitation for prospective international students and their families. It is notable, however, that nearly half of the reporting institutions also cited that international students do feel welcome on campus, likely due to the robust efforts that colleges and universities are making to ensure that all students feel welcome, safe, and secure during their studies.

Costs of U.S. higher education

The costs of U.S. higher education remain a perennial challenge in attracting international students, with 55.1 percent of institutions citing costs as one of the reasons for falling new student enrollment. According to the Institute of Education Sciences, National Center for Education Statistics (2013, 2018), the average costs for out-of-state tuition and fees at a public four-year institution has gone from approximately \$21,800 in 2012/13 to \$25,700 (+18 percent) in 2017/18. Private four-year institutions similarly climbed from \$24,500 to \$30,700 (+25 percent) over the same five-year time frame (Institute of Education Sciences, National Center for Education Statistics, 2013, 2018). While the costs of higher education have increased, several colleges and universities that reported increased new enrollments noted efforts to provide institutional scholarships (17 percent) or lower tuition and costs (5 percent) for international students.

Work experience

The ability for international students to gain practical work experience after their degree is often a compelling reason to pursue education in the United States. Just over 223,000 international students took advantage of OPT in 2018/19 after successfully completing their degree program (IIE, 2019). Despite the growing number of students pursuing OPT, approximately half of responding institutions with new student declines cited concerns about international students being able to secure a job in the United States after their studies. This concern may be due to various proposed and implemented changes that may limit the availability of opportunities for international students to extend their time in the United States through post-completion work experience.

Reasons for increasing and stable enrollment

Although just over half of all institutions reported declines, it is important to note that 42 percent of institutions reported growth, and 7 percent reported stable new international student enrollment for fall 2019. The top factors colleges and universities cited for growth continued to be active recruitment efforts (54.1 percent) and active outreach to admitted students (46.6 percent). Growing reputation and visibility of their institution also remained among the top three factors contributing to new enrollment increases (35.3 percent).

The number of institutions that cited growth due to partnerships with recruitment agents, alumni engagement, and eliminating test scores required for admission remained consistent with the 2018 Snapshot Survey. Approximately 28 percent of institutions attributed growth to increased partnerships with agents (compared to 26 percent in 2018), with even smaller proportions for the other categories. Economic and other external factors contributing to increased growth remained small, with the growth of the middle class in other countries cited as the top external factor (20 percent).

Looking to next year's recruitment cycle

Focus on recruitment of international students from Asia persists

As colleges and universities welcome the fall 2019 cohort to campus this year, many have already started recruitment for fall 2020. In preparing their global outreach for the coming year, institutions continued to report ongoing concerns about recruitment from Asia. The high levels of concern are likely due to the fact that 70.1 percent of all international students are Asian, with China and India alone sending more than half a million students to the United States in 2018/19 (IIE, 2019). As such, even small shifts in Asian students' plans to pursue higher education in the United States would have a large impact on overall international enrollment.

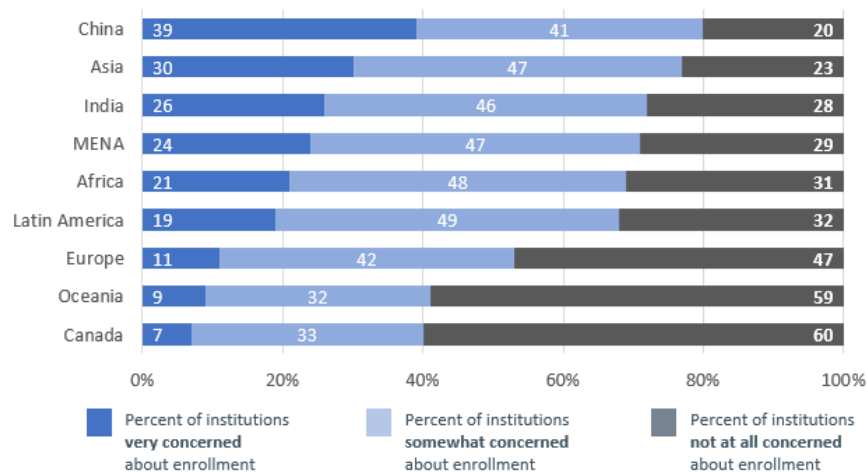


Figure 5: Fall 2020 international student regional recruitment concerns

Similar to 2018 Snapshot Survey results, approximately 80 percent of institutions continued to have concerns about maintaining or increasing international student numbers from China, 77 percent of institutions reported worries about future enrollment from Asian countries outside of China and India, and 72 percent cited apprehensions about India.

These concerns are likely driven by a leveling of international student growth from Asia. According to *Open Doors 2019*, the number of

students from both China and India increased, but at a slower rate than prior years. Concerns for 2020 may be driven by institutional perception about new enrollment changes by country for fall 2019 (IIE, 2019). Among reporting institutions, 45 percent indicated declines in new Chinese students, and more than 30 percent cited falling numbers of students from South Korea (39 percent), Vietnam (38 percent), Nepal (36 percent), and India (35 percent).

Institutions continue to prioritize outreach to Asia

To address these concerns, many institutions reported a continued focus on recruiting students from Asia. China remains the top priority, with 58.0 percent of institutions prioritizing recruitment from China. Vietnam and India remain priorities for student recruitment, with 49.9 percent focusing recruitment efforts on Vietnam and 45.2 percent prioritizing recruitment from India.

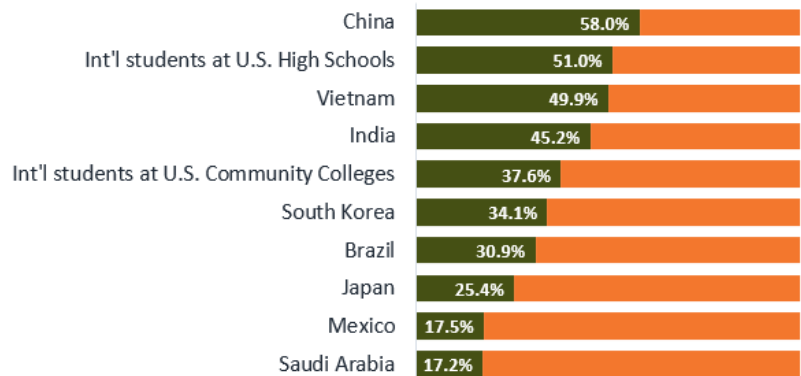


Figure 6: Institutional recruitment priorities

Recruiting international students from U.S. high schools

Among responding institutions, more than half (58.9 percent) reported prioritizing outreach and recruitment efforts for international students already pursuing educational activities in the United States, including students at U.S. high schools or community colleges. Many institutions (51.0 percent) indicated concentrating efforts to recruit locally from U.S. high schools. The high proportion of colleges and universities turning to U.S.-based international student recruitment was likely due to the ease of being able to recruit locally and the more than 73,000 international high school students studying in the United States (Mason, 2019).

Leveraging current international students and EducationUSA resources

This year, for the first time, the Snapshot Survey asked respondents about the resources they are leveraging to recruit international students. Of institutions actively recruiting international students, 59.2 percent reported that they are actively working with current international students on their campus for recruitment efforts. [EducationUSA](#) resources were also cited as popular recruitment resources (52.6 percent), including the *Global Guide*, student mobility fact sheets, recruitment fairs, and its network of more than 550 advisers in 180 countries. Just under half of respondents reported leveraging alumni (47.4 percent) and agents (40.1 percent) to enhance international student recruitment.

International students from areas of conflict

International students from areas of conflict often experience significant barriers when applying to and enrolling in colleges and universities in the United States. According to institutions, the largest hurdles for these students are challenges in obtaining a visa (78.8 percent) and affording the costs of tuition and living expenses (75.5 percent). Survey respondents also reported that students may have difficulties affording large one-time costs, such as traveling to the United States (35.3 percent), providing official academic documents (25.5 percent), and completing admissions placement exams (24.5 percent). Several institutions commented that students from select countries are experiencing difficulties in accessing or transferring funds from their home country, as well as mailing official documents due to both high cost and lost documents.

To address these barriers, many institutions (88.2 percent) continued to provide supports or special accommodations to international students applying and enrolling from conflict areas. A large and increasing number of institutions (70.0 percent) indicated that they are working to ensure that those students facing visa challenges can still enroll at their institution by providing enrollment extensions or deferrals to the next semester (10 percent increase from 2018). Many colleges and universities also provided assistance once students arrived on campus in the form of academic supports (55.3 percent) and counseling (50.7 percent). The larger problem of costs, however, remains challenging to address. Similar to the 2018 Snapshot Survey, just under half of responding institutions (41.7 percent) indicated providing tuition waivers or scholarships, and more than one quarter (28.7 percent) offered work study opportunities. Some colleges and universities also provided financial support through waiving application fees (34.7 percent), room and board (7.0 percent), and loans (6.0 percent).

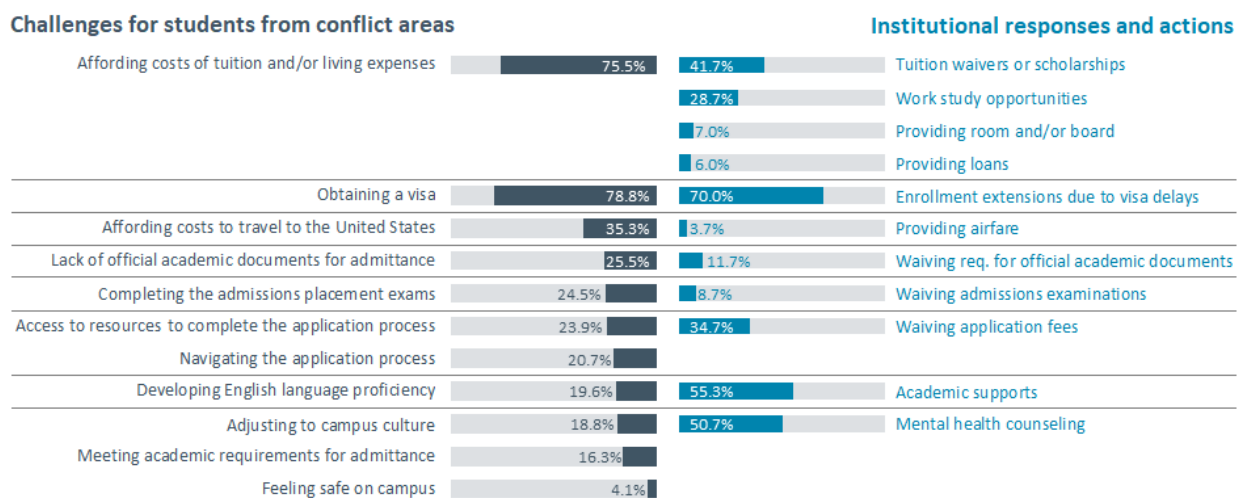


Figure 7: Challenges for students from conflict areas and institutional responses

After finishing their studies, some international students from areas of conflict may have concerns about returning home to unsafe environments. In these situations, institutions with students from conflict areas have continued to provide the same type of advice they provide other international students about pursuing OPT (81.6 percent) or continuing degree studies (73.1 percent). Most institutions also refer students to seek legal advice about relief that may be available to them (75.2 percent).

Current U.S. social and political climate

The United States and its higher education institutions have long been considered a welcoming environment for international students (IIE, 2015). However, this perception may have shifted over the past several years because of global and national dialogue on travel bans, immigration, personal safety due to gun violence, and race relations. While institutions often noted that students on campus feel welcomed and supported, they remained concerned that prospective international students may no longer perceive the United States as a welcoming and tolerant place to study.

This year, for the first time, the Snapshot Survey asked respondents to report on whether international students feel welcome on campus versus welcome in the local community. Positively, we found that approximately half reported that international students feel welcome on campus (48.6 percent) and more than a quarter reported that international students feel welcome in their local community (28.2 percent).

Of the colleges and universities that reported negative impacts, institutions cited that the largest impact was among prospective international students, noting the U.S. social and political climate as a potential deterrent to study in the United States (64.8 percent), similar to the 2018 Snapshot Survey. A quarter of institutions indicated

that international students on their campus have expressed the desire to leave or have left the United States as a result of the current U.S. social and political climate.

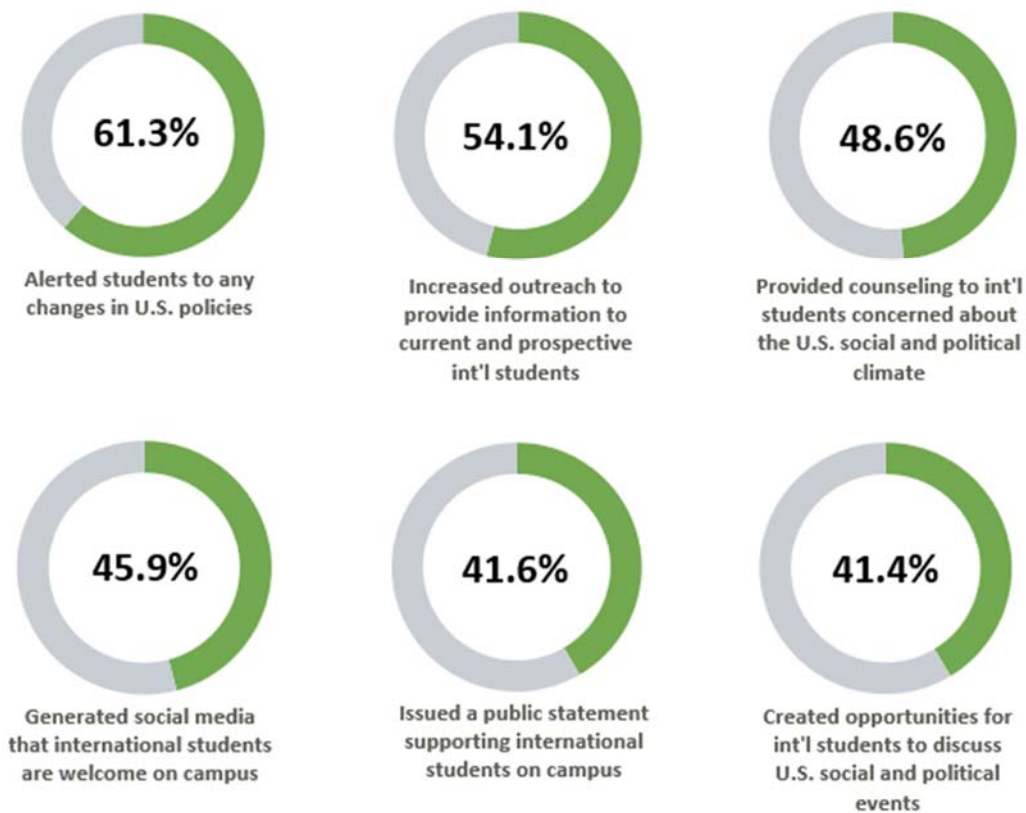


Figure 8: Top six institutional responses to current U.S. social and political climate

Institutions are responding to concerns regarding the shifting social and political situation through multiple forms of outreach to the university campus and broader community. The majority of institutions continued to report working closely with international students on campus by alerting students about changes in U.S. policies (61.3 percent) and increasing the level of outreach to provide information to current and prospective students (54.1 percent).

U.S. higher education institutions also continued to publicly advocate for international students by issuing public statements supporting international students on campus (41.6 percent) and releasing new social media campaigns (45.9 percent). The [#YouAreWelcomeHere](#) campaign, advanced nationally by Temple University, has continued to garner global attention, with almost 400 higher education institutions and many organizations using this hashtag to promote that all international students are welcome to study in the United States. Building upon the success of the social media campaign, more than 50 colleges and universities have committed to providing scholarships to international students through the #YouAreWelcomeHere national scholarship program (#YouAreWelcomeHere, 2019) as well as supporting the [#WelcomeToSucceed](#) campaign begun by NAFSA. Similar to last year, just over a quarter (27.4 percent) of institutions indicated reaching out to federal, state, or local policymakers (members of Congress, governors, mayors, etc.) to urge support for international students and to educate them on the important role these students play on campus.

Conclusion

International students contribute significantly to the [research and entrepreneurial leadership](#) of the United States, [supporting more than 458,000 U.S. jobs in the 2018/19 academic year according to NAFSA](#), and adding more than \$44.7 billion dollars to the U.S. economy in 2018 according to the U.S. Department of Commerce (Anderson, 2016; NAFSA, 2019; U.S. Bureau of Economic Analysis, 2019).

While international student enrollment continues to exhibit signs of leveling, the overall numbers of international students in the United States are expected to remain stable in fall 2019. Early indicators point to a continued but slowing decrease of 0.9 percent in new enrollment in fall 2019, with approximately half of reporting institutions recording declines. These institutions cited multiple factors, including visa difficulties, the global competition for talent, the U.S. social and political climate, and the costs of U.S. higher education. While it is expected that new enrollment declines will not be as steep as those experienced in fall 2017, U.S. higher education institutions remain committed to recruiting and welcoming international students from across the world.

Many institutions continue to take actions to encourage international students to study in the United States through robust recruitment and outreach efforts that address prospective student apprehension and ensure that students are well supported to succeed. With concerns about maintaining or increasing enrollments from Asia, institutions continue to focus recruitment on specific countries, particularly China, India, and Vietnam.

Faced with an increasingly competitive global higher education environment vying to attract the brightest minds from around the world, institutions across the United States continue to explore and expand ways to build recruitment pipelines and work to create an inclusive environment that reiterates that international students are welcome here.

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