FALL 2015 SNAPSHOT SURVEY OF INTERNATIONAL STUDENT ENROLLMENT

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A Brief Report

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Fall 2015 Snapshot Survey of International Student Enrollment: A Brief Report

This report looks at the trends in international student enrollments on U.S. campuses for the current 2015 academic year based on a survey distributed to institutions around the U.S. by eight partnering higher education associations. It is released jointly with the Institute of International Education's *Open Doors* Report, which provides a more comprehensive view of international student enrollment in the U.S. based on data from the previous academic year, 2014/15, by presenting a smaller "snapshot" of enrollment figures for the current fall semester. It also provides insights into the current efforts of U.S. colleges and universities in their international student recruitment and internationalization.

This report is based on early estimates from 278 institutions for fall 2015 and should not be viewed as comprehensive. It provides a brief look at potential trends for the 2015/16 academic year. A more comprehensive view of 2015/16 enrollment figures will be released with *Open Doors*[1] 2016 in November 2016.

A snapshot of international student enrollment in 2015

For the fall semester (or quarter) of 2015, 65% (255) of institutions who responded to the survey in both 2014/15 and 2015/16 reported an increase in international student enrollment compared with the previous academic year (2014/15)[2]. Of the institutions that showed increased growth in the number of international students enrolled, the number of international students increased by 6.8%. The greatest amount of growth has been among students in Optional Practical Training (16.3%) and among undergraduate students (10.7%).

Roughly 32% of institutions experienced a decrease in international student numbers this fall compared with the 2014/15 academic year, and eight institutions, or about three percent, experienced no change.

Based on the reported numbers, there appears to be a significant decrease in students from Brazil, Europe and East Asian countries, and moderate growth from other countries. On average among reporting institutions, there were decreases in numbers from China (down 4.0%), South Korea (down 11.4%), Japan (down 10.3%), Vietnam (down 4%), Taiwan (down 14.7%) and Indonesia (down 7.2%). There was also a marked decline among Brazilian students (down 25.7%), which sharply contrasts with the increase in Brazilian enrollment (44.7%) in the 2014 Fall Snapshot. Student enrollment from many Middle Eastern states increased, including Iraq

[1] This fall snapshot survey collects data separately from the annual *Open Doors* Report on International Educational Exchange produced by the Institute of International Education in partnership with the U.S. Department of State. *Open Doors* provides comprehensive statistics and analysis based on detailed data collected throughout the previous year from more than 3,000 U.S. campuses; the international student figures reported in *Open Doors* 2015 are for academic year 2014/15.

[2] This number is out of 255 institutions that have comparable data from the previous academic year.

(19.1%), Oman (26.3%) and Kuwait (2.3%). There were modest declines in Saudi students (down 3.2%) and Indian students (down 1%). Nigeria showed nominal increase (.3%) and the number of students from Europe decreased (down 19.7%).

Factors affecting international student enrollments

Institutions reported on the main institutional factors, as well as economic and other factors driving international student growth on their campuses, as reported in Table 1. Among institutional factors, a large majority of institutions reported that active recruitment efforts (78.0%) and a growing reputation and visibility of the institution (70.6%) were driving factors in growth. Increased linkages with universities in other countries (30.5%) and increases in institutional staff and resources dedicated to the recruitment and admission of international students (36.2%) were among other important institutional factors. In terms of economic and other factors, the growth of the middle class in many source countries was a primary factor (48.6%), as was the continued support and growth of foreign government-sponsored scholarship programs, such as those from Saudi Arabia and Brazil (36.7%).

Table 1. **Factors driving increases in international student enrollments, 2015/16**	**Percent reporting (N=177)**
Institutional changes	
More active recruitment efforts by my institution	78.0%
Growing reputation and visibility of my institution abroad	70.6%
Increased number of linkages with international universities	30.5%
Increased institutional support staff and/or resources for recruitment and admission of international students	36.2%
Growth of institutional scholarship opportunities for international students	13.6%
New academic programming targeted to international students such as ESL programs	18.6%
Increased number of joint/dual degree programs	17.5%
Increased participation by international high school students in pre-college summer programs	6.8%
Lowered tuition and costs to the students	4.5%
Increased efforts as a result of the 100K Strong in the Americas initiative	3.4%
Economic and other factors	
Growth of the middle class in other countries	48.6%
Growth of foreign government-sponsored scholarship programs (e.g., Saudi Arabia, Brazil, etc.)	36.7%
Less concern by international students about visa availability	21.5%
Difficulty in getting into top schools in home country	18.6%
We have not seen any increase in the number of newly enrolled international students	17.0%
Weak dollar made U.S. tuition costs more attractive	7.9%
Fewer available jobs make graduate school a more attractive option	6.2%
More restrictive student visa policies in other countries make the U.S. more appealing	5.1%
Growth of scholarship opportunities from U.S. government (e.g., Fulbright) and/or state/local government sources	4.0%
Growth of scholarship opportunities from private sources	2.8%
I do not know the reason for the increase	14.1%

However, as mentioned earlier, some institutions did experience declines in the international student enrollment (Table 2). Among those that did, a majority cited students' decision to stay home and enroll in their own country's higher education system (58.8%), and the cost of tuition/fees at U.S. host institutions (27.3%), including problems with securing adequate financial aid as contributing factors. Some institutions also cited students' decisions to enroll in other U.S. institutions (24.1%) and home country political and/or economic problems (16.6%) as factors in the decline of international students.

Table 2. **Major reasons for decline in international students, 2015/16**	**Percent reporting (N=187)**
Students' decisions to stay home and enroll in *their own country's* higher education institution	58.8%
Cost of tuition/fees at U.S. host institution (including financial aid problems)	27.3%
Students' decisions to enroll in other *U.S.* institutions	24.1%
Home country political and/or economic problems	16.6%
Lack of sufficient institutional support staff and/or resources for recruitment and admission of international students	13.9%
Visa application process and concerns over delays/denials	11.8%
Changes in admissions criteria and/or processes at U.S. host institution	7.0%
I do not know the reason for the decline	7.0%
Students' decisions to enroll in *another country's* institutions (other than the US)	2.7%
Students' concerns about securing a job after their studies in the U.S.	2.7%
Problems/concern over fee payments related to SEVIS	0.0%
Concerns about potential problems at the port-of-entry	0.0%
Other	16.0%

Institutions were also asked whether or not they took specific steps to increase or maintain international student enrollment and what steps were taken. Over 74.5% of institutions reported taking active steps in increasing or maintaining enrollment. The most frequently cited step among these institutions was increases in staff dedicated to the enrollment of international students (68.1%), while the development of international programs and collaborations abroad (46.8%) was another important action taken by many institutions (Table 3).

Table 3. **Steps taken to increase enrollments**	**Percent reporting (N=216)**
New staff or additional staff time focused on international student enrollment	68.1%
New international programs or collaborations abroad	46.8%
New funding for international recruitment trips	38.0%
Engaging third-party recruiters/agents	33.8%
New social media campaigns	25.9%
New funding for marketing and promotion of academic programs	23.2%
Engaging alumni networks	20.4%
Recruiting faculty from other countries	4.2%
Other	15.7%

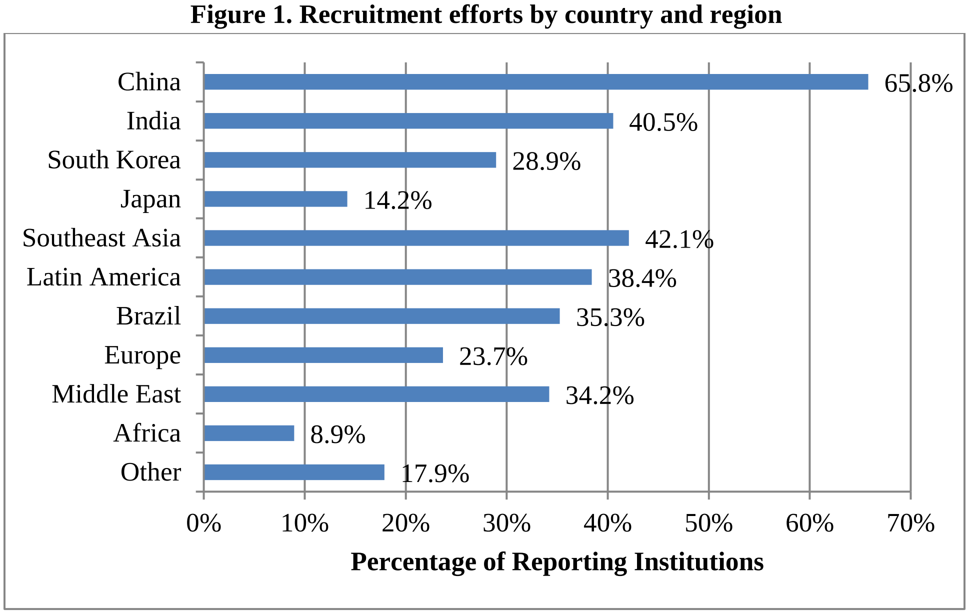
Among the 18.3% of institutions that reported taking no active steps to maintain or increase their international student enrollments, the greatest reason given was the lack of funding or resources (46.9%), as noted in Table 4. Many institutions also noted that they chose to continue existing policies for international student recruitment (42.2%) and that there was a lack of institutional commitment to international education (26.6%).

Table 4. Reasons for NOT taking steps to increase enrollment	Percent reporting (N=64)
Lack of funding or resources	46.9%
We have continued existing policies for international student recruitment	42.3%
Lack of institutional commitment to international education	26.6%
International student enrollment is stable or growing	25.0%
Other aspects of international education are considered higher priority on our campus	9.4%

Geographic focus of international student recruitment

For institutions actively recruiting in various countries around the world (Figure 1), three of the top destinations are major emerging economies: China (65.8%), India (40.5%), and Brazil (35.3%). Among world regions aside from China, India and Brazil, Latin America (38.4%), Southeast Asia (42.1%), and the Middle East (34.2%) attract much attention among surveyed institutions.

Figure 1. Recruitment efforts by country and region



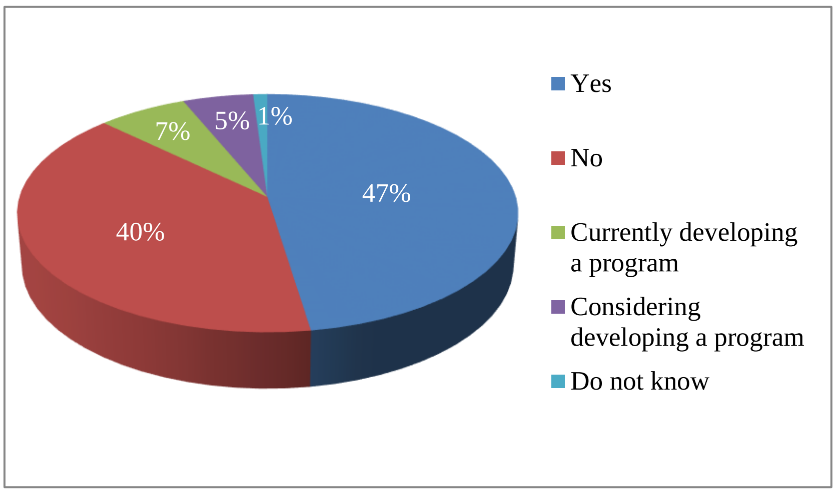
Pathway programs: a growing new trend

This year, we asked institutions about whether or not they have or are considering developing a pathway program on their campus. For the purposes of the fall survey, pathway programs have been defined as any program in which an international student:

- Has not met one or more admissions criteria at the institution, such as the English language requirement (e.g., TOEFL or IELTS score), or is otherwise deemed unready to begin regular coursework.
- Is conditionally or provisionally admitted to the institution upon completion of the pathway program.
- Learns and works on skills to become ready for regular coursework at the institution, such as English language skills and skills related to American academic culture, as well as, in some instances, help in adjusting to living in the United States.

As shown in Figure 2, almost half of all institutions (47.0%) reported that they had a pathway program, while 12.0% reported they were currently in the process of developing a program or were considering developing one.

Figure 2: Status of pathway programs at institutions, percent responding, Fall 2015



Among the 123 reporting institutions, a total of 10,464 international students are participating in pathway programs this fall.

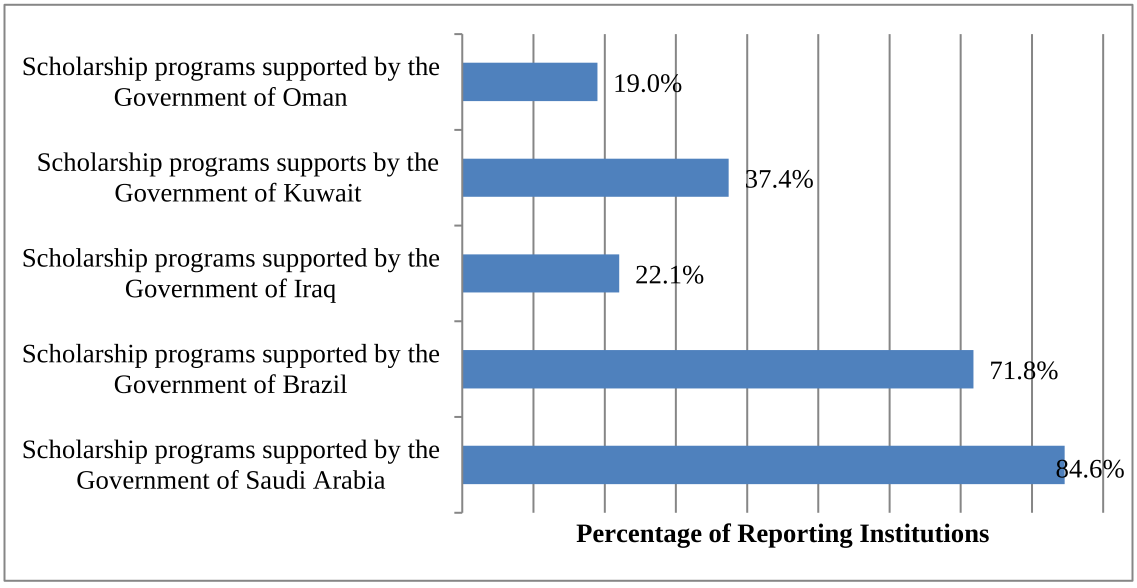
Institutions that had a pathway program or were developing one were also asked if they use a third-party provider (Table 5). Among these institutions, 22.8% said they were using (or planning or considering a partnership with) a third-party provider, while a large majority (74.1%) said they were not. For the 53 institutions utilizing a third-party provider, the vast majority reported that one reason for this was the provider's already established recruitment networks worldwide or in targeted regions (56.6%). Another major reason was that for many institutions, there was a lack of necessary resources to provide such services alone (43.4%).

Table 5. **Motivations for using a third-party provider**	**Percent reporting (N=53)**
The provider has already developed strong recruitment networks worldwide or in targeted regions.	56.6%
The institution lacks the human and physical resources to develop such a program alone.	43.4%
The costs of implementing a pathway program can be shared with the third-party provider.	35.9%
The provider has a proven track record of recruitment and provision of services related to pathway programs.	35.9%
The provider has already developed best practices in recruiting international students and implementing pathway programs.	34.0%
Other	35.9%
Do not know	18.9%

The continued and growing role of government scholarships

As demonstrated in Figure 3, scholarships sponsored by foreign governments continue to play an important role for many international students and the institutions that host them. The surveyed institutions demonstrated that the scholarship programs of Saudi Arabia (84.6%), especially the King Abdullah Scholarship Program (KASP), continue to play a major role for the institutions. Brazil, particularly the Brazil Scientific Mobility Program (BSMP), continues to be a major sponsor, with 71.8% of institutions reporting working with students sponsored by the Brazilian government. Other countries in the greater Middle East have also developed scholarship programs, with Kuwait (37.4%), Iraq (22.1%) and Oman (19.0%) being prominent among surveyed institutions. Turkey, Indonesia, Kazakhstan and Malaysia were also frequently mentioned as countries providing government scholarships.

Figure 3: Percent of institutions participating in foreign government scholarship programs



The 100,000 Strong in the Americas initiative

Respondents were asked again this year about their involvement with the 100,000 Strong in the Americas initiative, a U.S. federal government program designed to boost student mobility throughout the Western Hemisphere[3]. About 3.4% of institutions reported an increase in international student enrollment as a result of this initiative (see Table 1 above).

Among activities undertaken by institutions related to the 100,000 Strong in the Americas initiative (Table 6), planning and recruitment trips (55.5%) and partnerships with institutions in the region (43.0%) were the most reported.

Table 6. Activities associated with 100K Strong in the Americas	Percent reporting (N=128)
Conducted planning and recruitment trips to countries in the region	55.5%
Engaged in partnership activities with institutions in the region (research, faculty exchange, etc.)	43.0%
Hosted more students from the region	42.2%
Opened departments or centers dedicated to study of and/or engagement in the region	6.3%
Other	12.5%

Chinese students

Institutions were asked if they were experiencing growth in the numbers of Chinese students on their campuses. As noted earlier, numbers from reporting institutions show a decline in Chinese student enrollment (down 4.0%). Over 80% of institutions reported that they had not seen a substantial increase (20.0% or more) in students from China, while only 16.2% had experienced such increases. These two factors suggest a possible slowdown in the growth of Chinese students in the U.S.

This year again, institutions were asked about the impacts of Chinese students on campus and about services provided specifically for these students. Institutions varied in their responses, with some noting that the growth in the number of Chinese students has caused them to rethink certain modes of operation and hire additional staff, while others did not cite a significant impact or shift in services provided.

Among institutions who mentioned providing special services for Chinese students, responses also varied tremendously. Several institutions now offer Chinese speaking advisors and staff-members to cater to Chinese student populations. Other institutions have worked to address low levels of English language ability through pathway programs, English as a second language (ESL) courses, and tutoring services. Additionally, in attempting to support Chinese students both academically and socially, a few institutions have formed Chinese student organizations and mobilized Chinese faculty members to serve as mentors. There were also mentions of general

[3] For more on this program, visit the program website at www.100kstrongamericas.org.

services provided to the international student body as a whole and not specifically to Chinese students.

Helping students from countries in turmoil

Institutions were asked to identify the impact of financial turmoil on international student enrollment. Only 14.7% reported that economic turmoil in global markets had affected their enrollment, but the majority of institutions (44.7%) reported that it was too early to tell the effects of economic insecurity in students' home countries on international enrollment. Institutions were also asked about the type of support they offer to students from countries affected by political turmoil and the recent European migrant crisis. Of the eight institutions reporting assistance to affected students, three have been able to provide additional financial support in the form of tuition waivers, loans, housing, meal plans, etc. Half of respondents commented that their students had been negatively impacted by the European migrant crisis and three responding institutions have seen an increase in new enrollment from countries in the Middle East and other regions directly affected by the crisis.

Table 7.

Impact of financial turmoil in global markets	Percent reporting (N=266)
We are not sure and it is too early to tell	44.7%
No, we have not felt any negative impact this semester	32.7%
Yes, the number of international students has declined.	14.7%
Other, please specify	7.9%

Conclusion

International student enrollments in U.S. higher education institutions continue to grow. For the 2015/16 academic year, there appears to be a potential slowdown of students from Brazil, Europe and East Asia, most notably from Taiwan, South Korea and Japan, but growth from other regions, including parts of the Middle East, appears likely. This suggests that universities are diversifying their recruitment efforts beyond the usual country sources. United States higher education continues to benefit from international prestige, increased recruitment strategies targeting international students and the growing reputation of many of its institutions, as well as from the continued growth of the middle class in many developing countries. Competition from other U.S. institutions and the high costs of attendance are barriers for some institutions in attracting international students. However, many institutions continue to recruit strongly, often increasing funding, staff, and resources. The continued growth of foreign government scholarships and new institutional initiatives such as pathway programs may help bolster international enrollment for the foreseeable future.

About the survey:
A total of 278 institutions responded to the survey, reflecting the full range of U.S. higher education. Among the respondents, 25.5% enroll 20,000 or more students, 21.5% enroll 10,000 to 19,999 students, 18.3% enroll 5,000-9,999 students, 29.8% enroll 1,000-4,999 students, and 4.7% enroll fewer than 1,000 students. The composition of the respondent pool was as follows: Doctoral/Research institutions (33.8%), Master's institutions (32%), Baccalaureate colleges (18.7%), two-year colleges (10.1%), and Professional/Specialized institutions (5%). The survey was carried out by the Institute of International Education (IIE) in cooperation with American Association of Community Colleges (AACC), American Association of Collegiate Registrars and Admissions Officers (AACRAO), American Association of State Colleges and Universities (AASCU), American Council on Education (ACE), Association of Public and Land-grant Universities (APLU), Council of Graduate Schools (CGS), and NAFSA: Association of International Educators.

This report was prepared by the IIE Center for Academic Mobility Research and Impact with assistance from Amanda Gecht.