

FALL 2016 INTERNATIONAL STUDENT ENROLLMENT HOT TOPICS SURVEY

A Brief Report

Prepared by
Julie Baer

IIE Center for Academic Mobility Research and Impact
Institute of International Education

November 2016



Fall 2016 International Student Enrollment Hot Topics Survey: A Brief Report

The world has experienced many shocks in recent years with instability and refugee crises intensifying globally. These events impact the mobility of international students in the United States and throughout the world. International student mobility in the United States creates an interconnected learning environment that prepares graduates to tackle the serious, shared threats to our world and accounts for \$35.8 billion dollars in revenue according to the U.S. Department of Commerce (U.S. Department of Commerce, 2016). This report examines several of the hot topics impacting international student enrollment on U.S. campuses for the current 2016 academic year. With an emphasis on current events and issues impacting international student enrollment trends, this report covers international student enrollment; recruitment and outreach; governmental initiatives; the U.S. social and political climate; and students from conflict areas.

The International Student Enrollment Hot Topics Survey was distributed by ten partnering higher education associations listed on page 11 to their member institutions around the United States. It is released jointly with and complements the *Open Doors*¹ Report, which provides a comprehensive view of international student enrollment in the United States based on data from the previous academic year, 2015/16.

This report is based on data submitted by 423 institutions in October 2016 and should not be viewed as comprehensive. A comprehensive view of 2016/17 enrollment figures will be released in the *Open Doors* 2017 Report in November 2017.

Factors Affecting International Student Enrollment

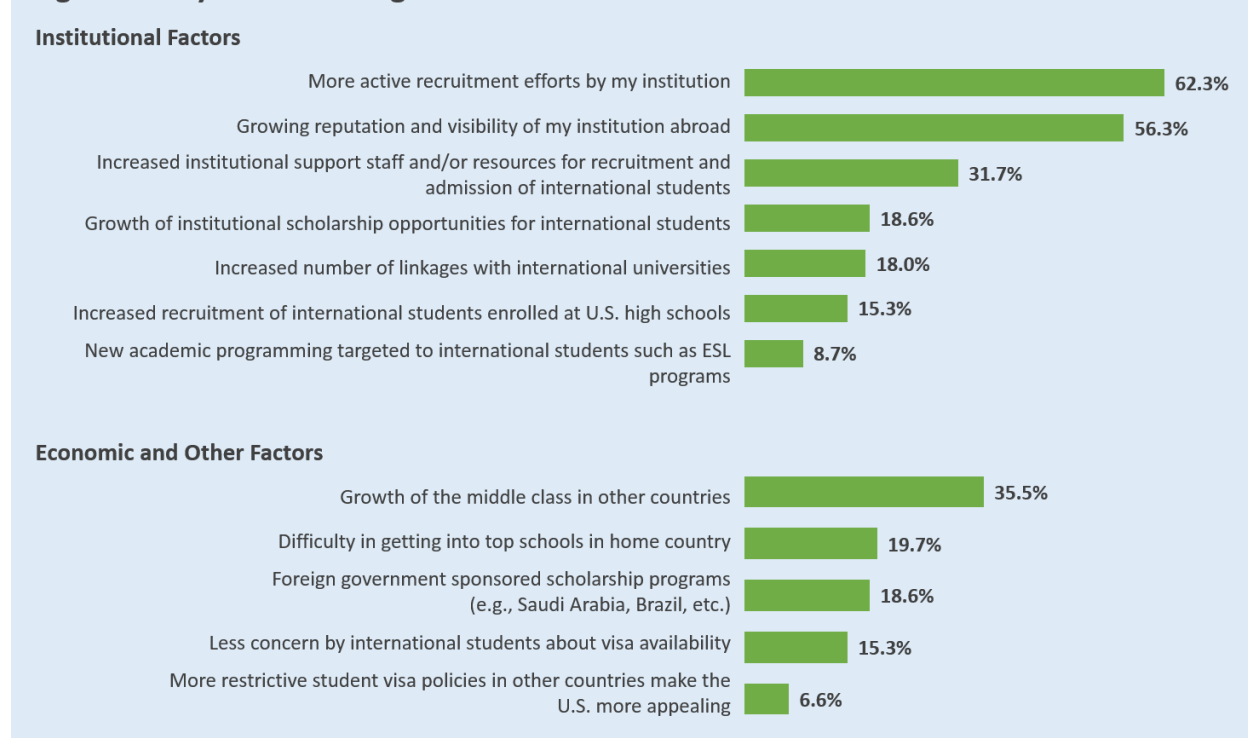
In Fall 2016, 45 percent of responding institutions report an increase in international student enrollment, 52 percent note declines in international student enrollment, and only 4 percent report that enrollment remains stable.

A number of factors contribute to either increasing or decreasing enrollment. Similar to previous years, the top two drivers of enrollment growth are increased active recruitment (62 percent) and the growing reputations of U.S. higher education institutions abroad (56 percent). The most significant economic and other factors that result in increased enrollment are growth in the

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* 2016 are for academic year 2015/16.

middle class in international students' home countries (36 percent) followed by international students' difficulty getting into top universities in their home country (20 percent).

Figure 1: Key factors driving international student enrollment

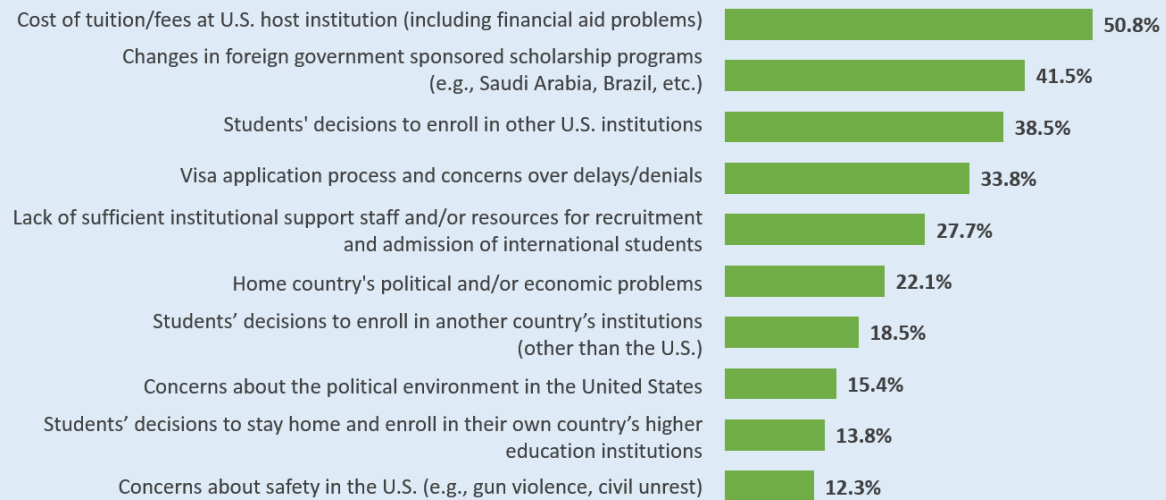


The extent to which some of these factors have driven growth has changed over the years. The proportion of institutions reporting increased enrollment due to international high school students in pre-college summer programs has doubled over the past three years (8 percent in 2014 to 15 percent in 2016). This increase is likely due to a growing number of international students pursuing a high school education in the United States. An earlier research report, *Charting New Pathways to Higher Education: International Secondary Students in the United States*, found that in 2013 there were over 73,000 international students attending U.S. high schools (Farrugia, 2014). As of 2015, this has grown to over 84,000, according to the Student Exchange Visitor Program (Farrugia, 2016, SEVP, 2015).

From 2014 to 2016, significantly fewer institutions cited foreign government sponsored programs (51 percent in 2014 to 19 percent in 2016) likely due to the freeze in the Brazil government's Scientific Mobility Program and changes in the eligibility requirements in the Saudi Arabian government's initiatives.

Institutions that report decreasing enrollment predominantly cite the costs of U.S. higher education tuition (51 percent), changes in foreign government scholarships (42 percent), and competition with other U.S. institutions (38 percent). These factors are not mutually exclusive, as 75 percent of institutions report that more than one factor impacts enrollment declines.

Figure 2: Key factors affecting declines in international student enrollment



Outreach and Recruitment Efforts

Most institutions continue their trend of recruiting international students from Asia, although indicators show that institutions are diversifying into Latin America and the Caribbean.

China and India remain the top two countries for recruiting and outreach with 67 percent of institutions reporting recruiting and outreach efforts in China and 49 percent in India. These are also the top two places of origin of international students in the United States in *Open Doors 2016*, accounting for almost half a million students in the United States.

International students from South Korea have been decreasing over the past five years causing the country to fall to the fourth place of origin in *Open Doors 2016*. In the 2015 Fall Enrollment Survey, only 29 percent of institutions reported engaging in recruitment in South Korea. In 2016, however, this proportion grew to 42 percent of institutions reporting recruiting in South Korea. Despite falling numbers of South Korean students reported in *Open Doors*, U.S. higher education institutions may now be increasing their outreach and recruitment in South Korea to either grow enrollments or to keep enrollments steady thereby preventing further declines in this student population.

As institutions look to diversify the international student body beyond the current top five sending countries, there are several countries where institutions report significant recruitment efforts. One example of this is Vietnam, where 47 percent of institutions reported expanded outreach. Due to strong recruitment by U.S. institutions and a growing economy, Vietnamese students studying in the United States quadrupled over the past decade from 4,597 in 2005/06 to 21,403 in 2015/16. With double digit growth over the past two years, Vietnam is now the sixth top place of origin of international students and survey results suggest that enrollment of

Vietnamese students may continue to grow as higher education institutions focus on this country in their outreach and recruitment. Institutions also prioritized recruiting in other Asian places of origin, such as Japan, Indonesia, Taiwan, Nepal, Thailand, and Malaysia.

Outside of Asia, institutions focus recruiting efforts to Brazil (29 percent), Mexico (25 percent), and elsewhere in Latin America.



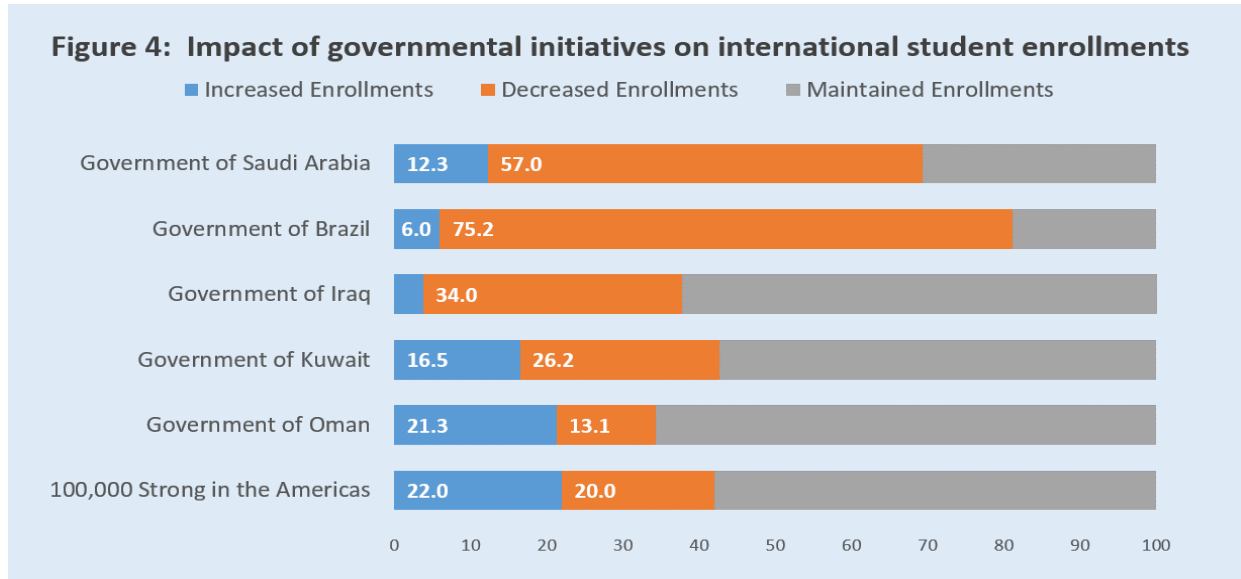
Governmental Initiatives

Governmental initiatives that provide financial assistance for students to study in the United States help grow international partnerships and linkages that benefit both sides. Of the institutions surveyed, 61 percent indicate that they participated in a governmental initiative, such as the King Abdullah Scholarship Program (KASP), the Brazil Scientific Mobility Program (BSMP), or scholarship programs through the governments' of Kuwait, Iraq, and Oman.

Institutions participating in the Government of Brazil's initiative report a 75 percent decrease in enrollments from Fall 2016. This decline is attributable to the freezing of the Brazil government's Scientific Mobility Program which provided funding for Brazilian students to study in the United States in science, technology, engineering, and mathematics (STEM) fields. Based on the downward movement of Brazilian students noted in this year's *2016 Open Doors Report* (declined 18.2% in 2015/16 to 19,370 students) and the continuing declines in enrollment during Fall 2016 indicated in this report, the decrease in international students from Brazil will likely continue.

The King Abdullah Scholarship Program (KASP) funded through the Government of Saudi Arabia has encouraged many students to study in the United States since its inception in 2005.

However, at the beginning of 2016, the Saudi Arabian government announced stricter eligibility requirements for students and participating institutions (Redden, 2016, July 18), reflected in several institutions (57 percent) recording decreased Saudi enrollment in Fall 2016. Some institutions noted that this has particularly impacted intensive English program enrollment.



While government scholarship programs create valuable opportunities for U.S. institutions to diversify their campuses, institutions should be mindful that governmental initiatives can be prone to changes due to economic fluctuations or shifting governmental priorities. An historical example of this is the Venezuelan government's Gran Mariscal de Ayacucho Scholarship Program which provided scholarships for students to study in the United States in fields tied to Venezuela's national development priorities. The program began in 1974 based on oil revenues, peaked in 1983 with almost 14,000 Venezuelan students studying in the United States, and then fell back to just above pre-program levels by 1987. With institutions reporting decreases in enrollment from Brazil and Saudi Arabia in Fall 2016 due to changes within their governmental programs, a similar downward drift towards the pre-initiative enrollment levels could occur.

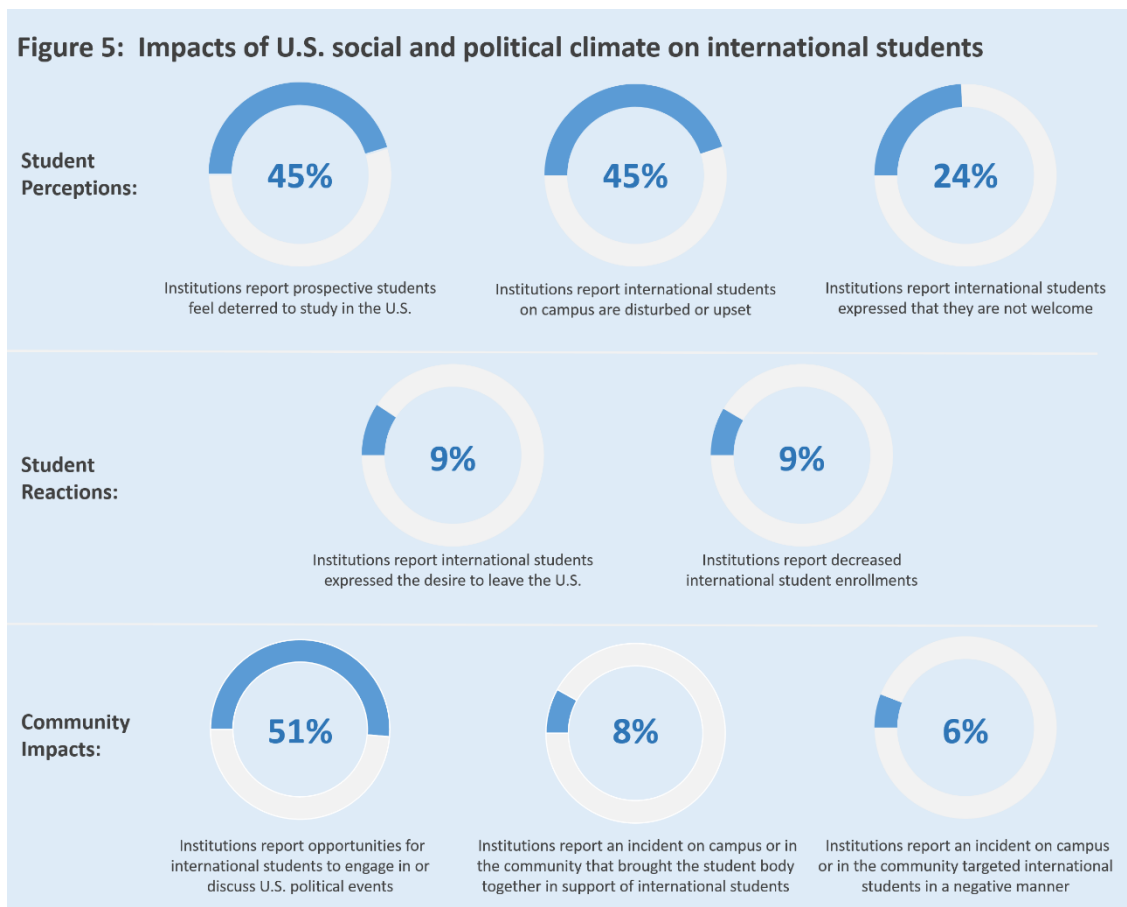
Current U.S. Social and Political Climate

The United States has long been considered a welcoming place for international students, not least of which is due to the inclusive nature of this country. An IIE study of the perceptions of prospective international students conducted from 2009 through 2013 found that 68 percent felt that the United States welcomes international students (Institute of International Education, 2015). When compared with other top destinations of international students (Australia, Canada, China, France, Japan, Germany, and the United Kingdom,) the United States ranked highest in this dimension.

However, the current political climate may be altering the perceptions of the United States as a welcoming and tolerant place to study. A majority of the institutions surveyed in the Fall 2016 International Student Enrollment Hot Topics Survey (56 percent) indicate that the current social or political events in the United States are impacting international students on their campuses either negatively or positively.

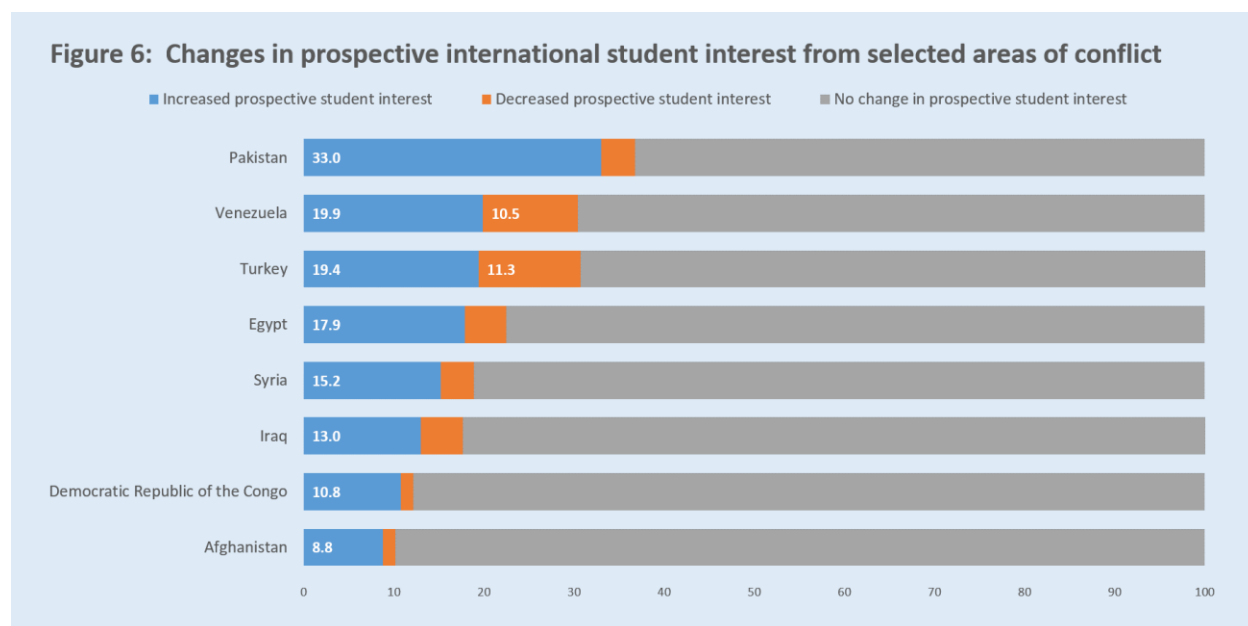
A significant number of institutions report that international students expressed negative attitudes regarding the current political climate with 45 percent suggesting that prospective international students may be deterred from studying in the United States and another 45 percent reporting that international students on campus are upset or disturbed by political events.

While prospective and enrolled international students may feel some unease, fewer than 10 percent of institutions report a decrease in international student enrollments or have students expressing the desire to return home due to the political climate. Some institutions indicate that apprehension is highest among prospective students, and that once these students arrive on campus, they feel welcomed into the college or university community. Many U.S. institutions (51 percent) have used the current political and social climate as an opportunity to create dialogue around differing political perspectives. Institutions cite providing space for workshops, trainings, and discussions of political events and diversity.



Students from Conflict Areas

The world continues to witness destabilizing conflicts such as civil wars, sectarian violence, political instability, and transnational terrorism. As of 2016, the Council on Foreign Relations tracks 28 worsening or unchanging conflicts in their Global Conflict Tracker (Council on Foreign Relations, 2016). These conflicts can disrupt students' academic pursuits at all levels, elementary through higher education. In this survey, U.S. institutions provided data on student interest to attend their college or university as increasing, decreasing, or remaining stable from countries that are experiencing conflict.



Of the countries reflected in this survey, institutions report the largest increased prospective student interest from Pakistan (33 percent). While the number of students from Pakistan has risen over the past five years according to *Open Doors 2016*, it has not reached the peak level reported prior to 2001, indicating room for further growth in enrollment of Pakistani students. Organizations, such as the United States Educational Foundation in Pakistan remains committed to providing scholarships for Pakistani students to study in the United States (United States Educational Foundation in Pakistan, 2016).

There has been a strong commitment from institutions and partners throughout the Middle East to provide support for students displaced due to instability in the region. Institutions, governmental initiatives, non-profits, and corporations have worked to provide opportunities for students in Syria, Iraq, Afghanistan, and Yemen through programs, such as IIE's Syria Consortium for Higher Education in Crisis and the Government of Iraq's Ministry of Higher Education and Scientific Research (GOI MoHESR) program.

An increase in institutions reporting growing interest from Venezuelan students (20 percent) remains consistent with prior trends of Venezuelan students eager to come to the United States, particularly to institutions in Florida which host just over 40 percent of Venezuelan students according to *Open Doors 2016*. The number of students coming to the United States from Venezuela increased in 2015/16, rising to almost 8,300 and continues a three-year trend of growth from Venezuela. Eleven percent of institutions, however, report decreasing interest among Venezuelan students. Many of these institutions noted the difficulties students experience in securing funds through the National Centre for Foreign Trade, the government body that administers the exchange of currency in Venezuela (Marklein, 2015).

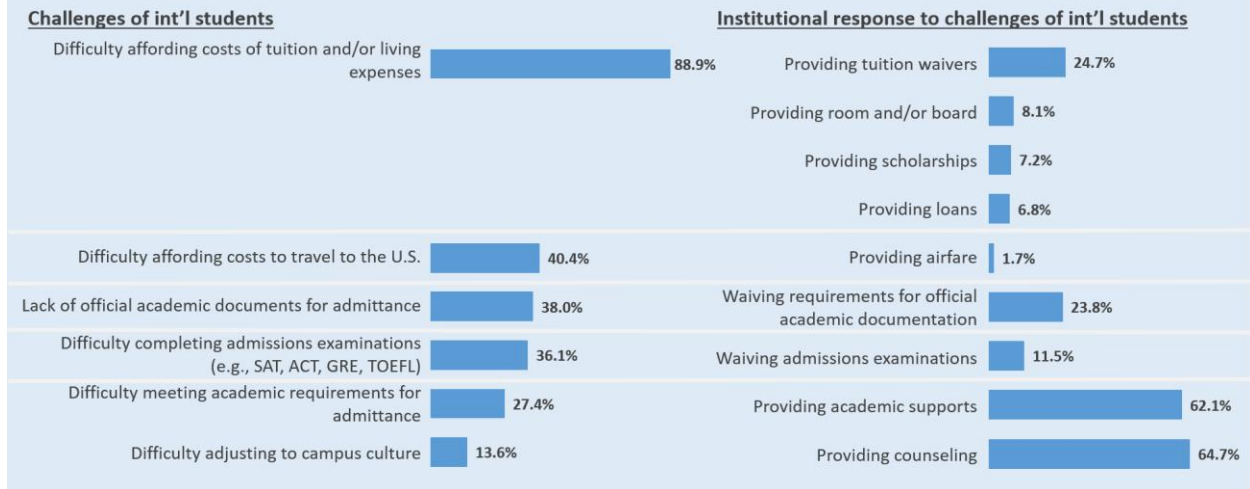
The number of Turkish students in the United States has declined over the past six years. The institutions that report strong student interest in Fall 2016 (19 percent) is likely due to an attempted coup d'état in July of 2015 and the subsequent suspension of 1,500 university deans and temporary travel ban on Turkish academics (Redden, 2016, July 20). This trend was also noted by Study Portals which experienced a tripling of Turkish visitors to their site to explore global higher education opportunities within a week of the failed coup (Study Portals, 2016).

While student interest may be increasing across several conflict countries, prospective international students from areas of conflict face numerous challenges in applying to and enrolling in U.S. higher education institutions. When asked about the challenges these student encounter, a large majority of institutions (89 percent) cite difficulty with tuition and living expenses. Institutions also report that these students may have challenges in accessing official documentation (38 percent), examinations required for admittance (36 percent), or one-time costs, such as travel to the United States (40 percent).

Over half the institutions surveyed (56 percent) indicate that they are working to address the challenges faced by international students from conflict areas both in applying and enrolling. These efforts include waiving requirements for official documentation (24 percent) and waiving admissions examinations (12 percent). Several institutions also noted providing alternatives to standardized tests to demonstrate English language proficiency and waiving application fees.

Once students from conflict areas are admitted, institutions address difficulties in affording tuition and living expenses primarily by providing tuition waivers (25 percent). Some institutions provide financial support through room and board (8 percent), scholarships (7 percent), loans (7 percent), and tuition payment plans. A majority of reporting institutions cite that they are providing counseling (65 percent) and academic supports (62 percent). While institutions are delivering supports, there is still room for improvement in ensuring international students from conflict areas are able to access higher education institutions in the United States. Of the 56 percent of institutions that are able to provide any form of support to prospective or enrolled students from conflict areas, only a fraction of those institutions (41 percent) report providing financial assistance to students from areas of conflict, which is the largest deterrent to these students' ability to study in the United States.

Figure 7: Challenges in applying and enrolling students from conflict areas and institutional responses



Brexit

In June 2016, the U.K. voted in a referendum to leave the European Union. While it will likely take several years for the U.K. to officially withdraw, this decision may impact students in the U.K., Europe, and around the world. Institutions in the U.K. have noted that this could create decreased diversity of international students at U.K. institutions due to increases in tuition costs, visa restrictions, and access to opportunities for practical work experience (Minsky, 2016).

The impact of the Brexit vote likely goes beyond the borders of the U.K. When U.S. institutions were asked about the impact of Brexit on international student interest on their campus, a majority of respondents (96 percent) indicated that there have not yet been noticeable changes in interest or applications or that it is still too early to ascertain impacts of the Brexit vote. A small number of institutions anticipate that Brexit could increase international student enrollment to the United States due to international students feeling unwelcome in the U.K., increasing costs to study in the U.K. for international students, and increased difficulties gaining an international student visa to the U.K. Conversely, another potential impact is that Brexit could decrease international student enrollments to the United States from the U.K. because the decreased value of the British pound makes the United States a more expensive place to study.

Conclusion

While it is likely that international student enrollment in U.S. higher education institutions will continue to grow, there may be a potential slowdown of enrollment growth due to multiple factors affecting the field. U.S. higher education institutions remains committed to opening doors and welcoming international students who diversify their campuses and communities. Institutions actively recruit students from Asia, and increasingly from other regions of the world, such as Latin America and the Caribbean. Institutions also benefit from the growing reputation of their programs abroad and a commitment to excellence in education. Other factors, however, suppress international student enrollment increases on campus. Institutions report that international students face challenges in affording the costs of higher education in the United States; changes to governmental programs, particularly from Brazil and Saudi Arabia; and continued competition with other U.S. colleges and universities.

Institutions find that student interest from several conflict areas is increasing, but that these students face difficulties in the application process and the costs of tuition and living expenses once admitted. Institutions are creatively working to address these challenges through a number of initiatives, but more remains to be done to ensure that international students from conflict areas are not impeded from accessing higher education opportunities.

Another complexity this year has been the tense U.S. political and social climate, which has made some potential and current international students feel upset or unwelcome in the United States. Recognizing the potential negative effects of these social and political issues, such as anti-immigration rhetoric, religious insensitivities, racial discord, and gun violence, a majority of institutions have fostered dialogue and discussions to address these fears among international students. While students express worries about the new political direction of the United States, there has not yet been evidence of significant decreases in enrollment due to the 2016 election, nor have there been policy shifts that signal a reduction of international students in the United States. Over the past century, U.S. institutions have welcomed the brightest minds from around the world, a tradition that now brings over one million international students to study to the United States and one that is poised to continue on into the future.

About the survey:

A total of 423 institutions responded to the 2016 International Student Enrollment Hot Topics survey. The survey was carried out in October 2016 by the Institute of International Education (IIE) in cooperation with American Association of Collegiate Registrars and Admissions Officers (AACRAO), American Association of Community Colleges (AACC), American Association of State Colleges and Universities (AASCU), American Council on Education (ACE), Association of Public and Land-grant Universities (APLU), College Board, Council of Graduate Schools (CGS), National Association for College Admission Counseling (NACAC), and NAFSA: Association of International Educators

Citations:

- Council on Foreign Relations (2016, November 4). *Global Conflict Tracker*. Retrieved from: <http://www.cfr.org/global/global-conflict-tracker/p32137#!/>.
- Farrugia, C. (2016, June 1). *International Secondary Students in the United States*. NAFSA presentation, Denver, Colorado.
- Farrugia, C. (2014). *Charting New Pathways to Higher Education: International Secondary Students in the United States*. New York: Institute of International Education.
- Institute of International Education (2015). *What International Students Think About U.S. Higher Education: Attitudes and Perceptions of Perspective International Students from Around the World*. New York: Institute of International Education. Retrieved from: <http://www.iie.org>.
- Marklein, M.B. (2015, June 19). Venezuelan students abroad suffer in currency rule trap. *University World News*. Retrieved from: <http://www.universityworldnews.com/article.php?story=20150617144258615>.
- Minsky, C. (2016, June 24). How could Brexit impact international students? *Times Higher Education*. Retrieved from: <https://www.timeshighereducation.com/student/news/how-could-brexit-impact-international-students>.
- Redden, E. (2016, July 18). Saudi Enrollment Declines. *Inside Higher Ed*. Retrieved from: <https://www.insidehighered.com/news/2016/07/18/saudi-student-numbers-fall-many-campuses>.
- Redden, E. (2016, July 20). ‘Unprecedented’ Purge in Turkey. *Inside Higher Ed*. Retrieved from: <https://www.insidehighered.com/news/2016/07/20/unprecedented-purge-deans-turkey>.
- SEVP (Student Exchange Visitor Program) (2015). SEVIS data on international students obtained from SEVP through a FOIA request.
- Study Portals (2016, July). *Number of young Turks wanting to study abroad tripled overnight*. Retrieved from: <http://www.studyportals.com/blog/young-turks-wanting-to-study-abroad-tripled-overnight/>.

U.S. Department of Commerce (2016). *Table 2.2. U.S. Trade in Services, by Country or Affiliation and by Type of Service*. Washington, DC: U.S. Department of Commerce Bureau of Economic Analysis.

United States Educational Foundation in Pakistan (2016). *About USEFP*. Retrieved from <http://www.usefpakistan.org/index.cfm?Tab=Home>.