IIE Center for Academic Mobility Research and Impact

# Fall 2018 International Student Enrollment Hot Topics Survey

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## Introduction

Based on a Fall International Student Enrollment Hot Topics Survey of U.S. higher education institutions conducted annually since 2005, this 2018 report provides the international education field with a quick and timely look at current patterns and trending topics in international student enrollment. The results of this survey are designed to provide insight into how U.S. higher education institutions are impacted by the shifting landscape in the United States and abroad. Additionally, the findings provide information for colleges and universities to benchmark their own enrollment patterns and to inform ongoing outreach and recruitment strategies. This year's survey focused on understanding Fall 2018 new international student enrollment, institutional recruiting and outreach priorities, and the wider factors impacting U.S. colleges and universities. The report is released jointly with and complements the *Open Doors Report*, which provides a comprehensive view of international student enrollment in the United States based on data from the previous academic year (2017/18). However, it should be noted that this Hot Topics Survey report reflects responses from just 540 institutions. The full picture for 2018 fall enrollment, reflecting responses from thousands of U.S. higher education institutions, will be analyzed in detail in *Open Doors* 2019, available in November 2019.

## Key findings:

### The overall findings of the fall Hot Topics Survey align with those of *Open Doors* 2018. Respondents indicate an overall leveling of the total number of international students in the U.S. and continued declines among new international students in Fall 2018, but at a less steep rate.

- **Total enrollments:** Total international student enrollment is level (0.0 percent change) among responding institutions. Similar to data from *Open Doors 2018*, the number of international students pursuing employment opportunities following their academic studies on Optional Practical Training continued to increase (+7.1 percent), while the number of enrolled students declined (-1.7 percent).
- **New enrollments:**
    - New enrollment numbers continue to vary based on institutional characteristics and geographic regions with Associate's and Master's institutions, less selective colleges and universities, and the Midwest reporting steeper declines. Research universities indicate an uptick in new international student enrollment.
    - 49 percent of institutions describe a drop in new international student numbers. However, 44 percent of institutions report an increase, and another 7 percent indicate new enrollment was stable.
    - Overall, responding institutions report a 1.5 percent decrease in the number of international students enrolling for the first time at a U.S. institution, which indicates a third consecutive year of falling new enrollment. The drop is not as steep as the new enrollment decline in Fall 2017 (down 6.6 percent according to *Open Doors 2018*).
- **Causes for changes in new enrollments:** The vast majority of institutions (94 percent) attribute the decrease in new enrollment to multiple factors. Compared to Fall 2017, more institutions attribute Fall 2018 declines in new enrollment to problems with visa delays and denials (83 percent), the U.S. social and political climate (60 percent), and student decisions to enroll in another country (59 percent).

### Institutions are concerned about recruitment for next year (Fall 2019), particularly from Asia.

- For Fall 2019, institutions report elevated concerns about recruiting international students from Asia (excluding China and India) (81 percent), China (80 percent), and India (72 percent). With two-thirds of all international students in the United States from Asia, apprehensions are likely related to the fact that any shifts in student interest would significantly impact overall enrollment.

- Concerns for 2019 may be driven by institutional perception about new enrollment changes by country for Fall 2018. Among reporting institutions, 48 percent of indicate declines in new Chinese students, 42 percent cite falling numbers of Indian students, and 38 percent note decreases in South Korea, Nepal, and Vietnam. To address these concerns, institutions report that are committed to recruiting in the Asian market by prioritizing international student outreach and recruitment in Asia, particularly China (65 percent), India (51 percent), and Vietnam (51 percent).

- Nearly half (46 percent) of responding institutions report focusing recruitment efforts on international students already in the United States, such as international high school students.

### International students from areas of conflict face significant hurdles to enrolling at U.S. higher education institutions.

- Institutions note that international students from areas of conflict encounter difficulties in affording the costs of tuition and living expenses in the United States (80 percent) and obtaining a visa (76 percent).
- Among responding institutions, colleges and universities are increasingly working to address the challenges faced by these international students. Many institutions report offering enrollment extensions and deferrals for students with visa delays (59 percent), counseling services (53 percent), and academic supports (49 percent). To address the challenges of costs, colleges and universities report providing tuition waivers or scholarships (43 percent), waiving application fees (33 percent), and facilitating work study opportunities (31 percent).

### The current U.S. social and political environment presents challenges for international student recruitment.

- Similar to data from Fall 2017, the majority of responding institutions (92 percent) report that the current U.S. social and political climate impacted their campus either positively or negatively over the past year.
- The largest impacts continue to be on the attitudes and perceptions of prospective international students with 64 percent of colleges and universities reporting that prospective students cite the current U.S. social and political climate as a potential deterrent to U.S. study. Roughly one in four responding institutions (24 percent) indicate that international students expressed the desire to leave or have left the United States due to the current climate, up from 16 percent in Fall 2017.
- Many institutions have responded to the shifting social and political situation through a series of actions, such as alerting students about changes in U.S. policies (62 percent), increasing outreach to current and prospective international students (56 percent), and issuing statements in support of international students (48 percent).

## Methodology

### Survey Background and Data Collection:

Ten partnering higher education associations distributed the International Student Enrollment Hot Topics Survey (henceforth, Hot Topics Survey) in late September and early October, 2018 to their member institutions across the United States. The survey was carried out 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.

The survey captured 540 valid responses from higher education institutions throughout the United States. Not all respondents provided complete data, so valid item response rates are lower for some questions. Responding institutions accounted for 44.7 percent of the international student population reported in *Open Doors* 2018.

The analysis for this report was prepared with assistance from Paromita De.

### Respondent Profile:

Respondents to the 2018 Hot Topics Survey reflect a broad range of institutional types and locations from across 49 states and the District of Columbia. Overall, the profile of the Hot Topics Survey respondents closely mirrors the

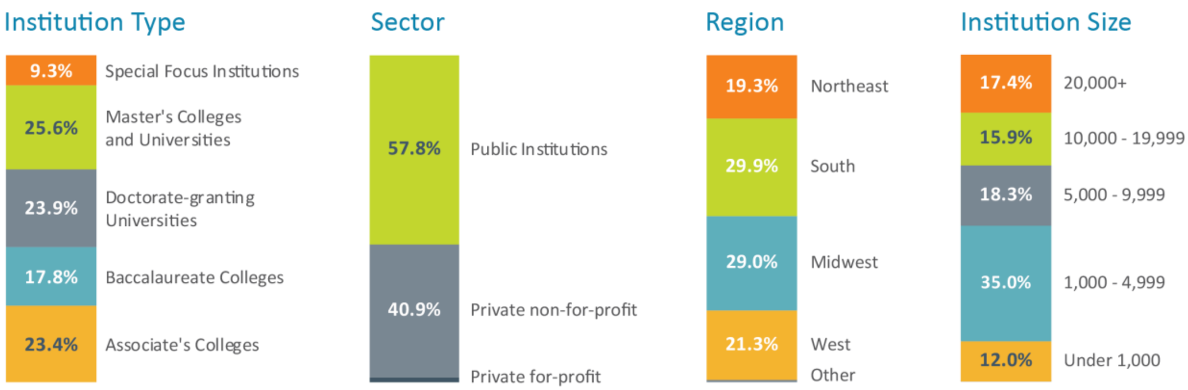


*Figure 1. Survey respondent profile*

profile of institutions that completed the 2018 *Open Doors* 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[1], there is an overrepresentation of large, doctoral institutions in the Hot Topics Survey.

## Slowing Decline of International Student Enrollment

### Downward trend of new international student enrollment continues, but at a less steep rate.

The recent changes in new international student enrollment have been 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 over a decade. According to the *Open Doors* data, the number of new international students began to shift three years ago following several years of high growth. Starting in Fall 2015, new international student enrollment slowed to 2.4 percent growth, and then exhibited declines in both Fall 2016 (-3.3 percent) and Fall 2017 (-6.6 percent).

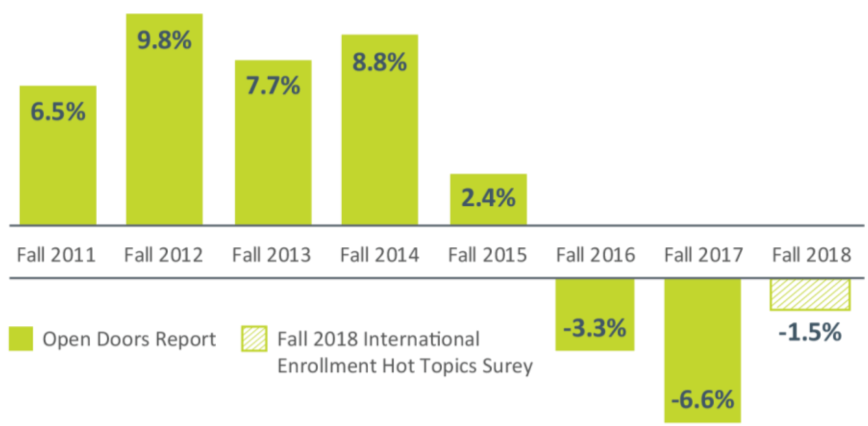


*Figure 2. Percent change per year of new international student enrollment*

Among the institutions reporting to the Fall 2018 Hot Topics Survey, the downward pattern noted by *Open Doors* for the past couple years appears to be abating. While colleges and universities continue to report declines, new enrollment fell by a modest 1.5 percent, which is not as steep as the 6.9 percent decline that had been estimated by the Fall 2017 Hot Topics Survey.

Due to some years of declines in new enrollment across all academic levels, overall international student enrollment (undergraduate, graduate, and non-degree students) have started to decline at U.S. higher education institutions. According to *Open Doors* 2018, enrolled international students fell by 1.3 in Fall 2017. This trend is likely to continue based on the sample of institutions reporting to the Hot Topics survey. Survey respondents indicate that enrolled

[1] Based on the 2015 Carnegie Classification of Institutions of Higher Education. For more information, see http://carnegieclassifications.iu.edu/index.php.

students declined by 1.7 percent for Fall 2018, while the overall number of international students (enrolled and Optional Practical Training) remained flat. The international student number likely remains stable due to students staying in the U.S. higher education pipeline to complete their degrees, advancing to further degree study, or pursuing professional training opportunities related to their studies through Optional Practical Training (OPT). Among reporting institutions, OPT continued to experience a robust 7.1 percent growth.

## Declines in new international student enrollment vary across institutional types and regions.

While the number of new international students fell nationally, institutional responses vary widely: 49 percent of institutions record declines in new international students from Fall 2017 to Fall 2018, while 44 percent indicate growth, and 7 percent experienced no change in new enrollment.

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 enrollment impacts colleges and universities differently based on institutional characteristics and geographic regions.

Declines in new international student enrollment are higher among public institutions which report a 1.8 percent drop in new enrollment. Private not-for-profit institutions, however, remain relatively flat with a 0.5 percent decline recorded. Differences in enrollment patterns also vary by institutional type with Master's colleges and universities (-10.8 percent) and Associate's colleges (-7.7 percent) reporting declines and Doctoral institutions (+0.3 percent) and Baccalaureate colleges (+5.5 percent) indicating increases.

New international student enrollment was also examined by institutional selectivity[2]. Similar to the prior year, more selective institutions, which likely have better global brand recognition, continue to experience growth in new international students in Fall 2018, while institutions that admitted over half of their applicants—an indicator of lower selectivity—report declines.

| Institutional Selectivity | % Change from Fall 2017 |
|---|---|
| 90 percent or more accepted | -7.0 |
| 75.0 to 89.9 percent accepted | -2.8 |
| 50.0 to 74.9 percent accepted | -1.9 |
| 25.0 to 49.9 percent accepted | 0.7 |
| 10.0 to 24.9 percent accepted | 3.6 |
| Less than 10 percent accepted | 2.5 |

*Figure 3. New enrollment percent change by institutional selectivity*

New international student enrollment patterns also differ geographically across the top host states and U.S. regions. Of the top four host states of international students, Texas institutions report flat new international student enrollment (+0.1 percent) and New York colleges and universities declined by 1.1 percent. In contrast, California and Massachusetts institutions record growth in new international student enrollment (+3.3 percent and +8.3 percent, respectively).

To better understand trends throughout the United States, new enrollment was also classified by each of the broad U.S. Census Bureau divisions[3]. Across the four geographic areas, the Midwestern region continued to see the strongest declines in new enrollment, which is in line with trends reported in *Open Doors* 2018.

[2] Based on data from the National Center for Education Statistics' Integrated Postsecondary Education Data System on the 2015 percent admitted data on the number of admission divided by the total applicants.
[3] 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.

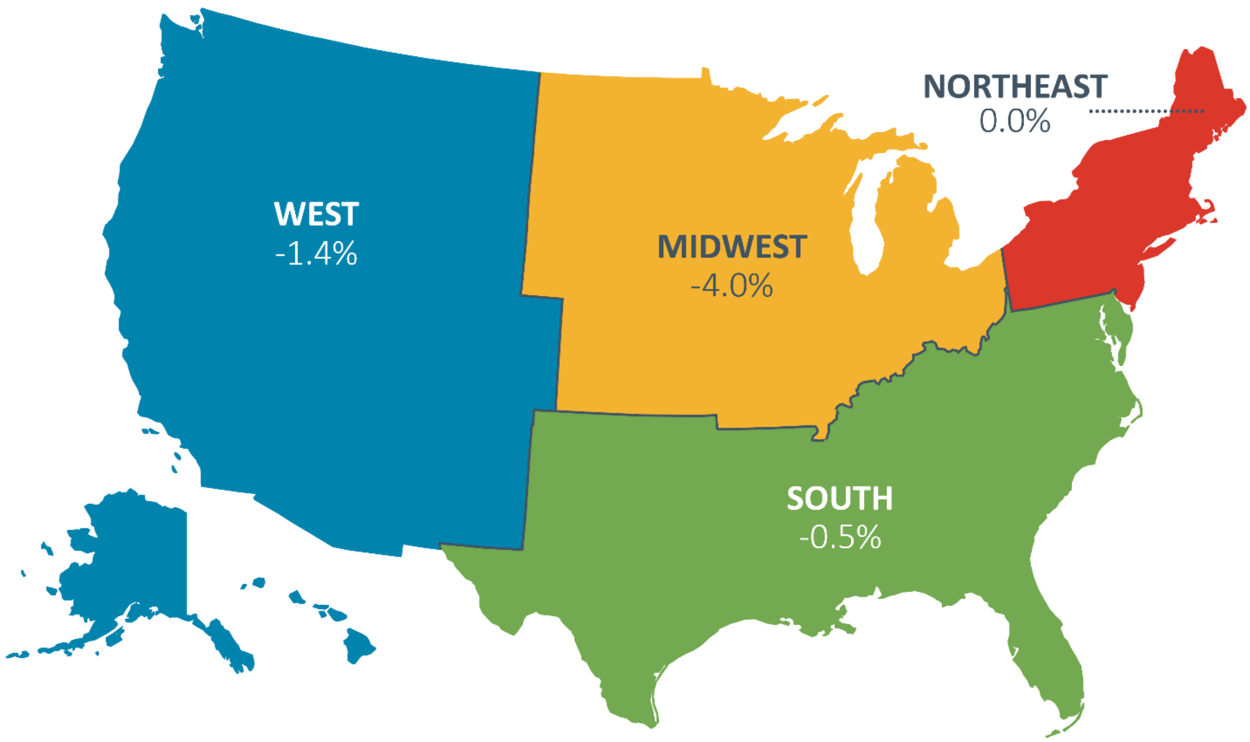


*Figure 4. New international student enrollment percent changes by U.S. geographic divisions*

## Shifting reasons for declining enrollment

Among institutions experiencing declining new enrollment, notable shifts occurred in many of the reported reasons for falling international student numbers from Fall 2017 to Fall 2018. Survey respondents cite that the key factors contributing to these declines are visa application issues or denials, the social and political environment, the increasingly competitive global market of higher education options, and the costs of U.S. higher education. An overwhelming majority of institutions (94%) indicate that it is not just one reason, but rather these *multiple* factors that contribute to falling new student enrollment numbers.

### Visa concerns

Survey respondents list visa application process issues or visa delays/denials as the top reason for Fall 2018 drops in new enrollment. Institutions reporting declines in new enrollment have increasingly cited this as a concern. The proportion of institutions grew from 33.8 percent in Fall 2016, to 68.4 percent in Fall 2017 (+35 percentage points), to 82.7 percent in Fall 2018 (+14 percentage points). Additionally, among institutions who reported that their new enrollment had increased or stayed the same, visa issues remain the top issue when asked about factors that may be impacting their institution (73.4 percent). In particular, several institutions specifically commented about experiencing difficulties with visa denials for students from Asia and Sub-Saharan Africa.

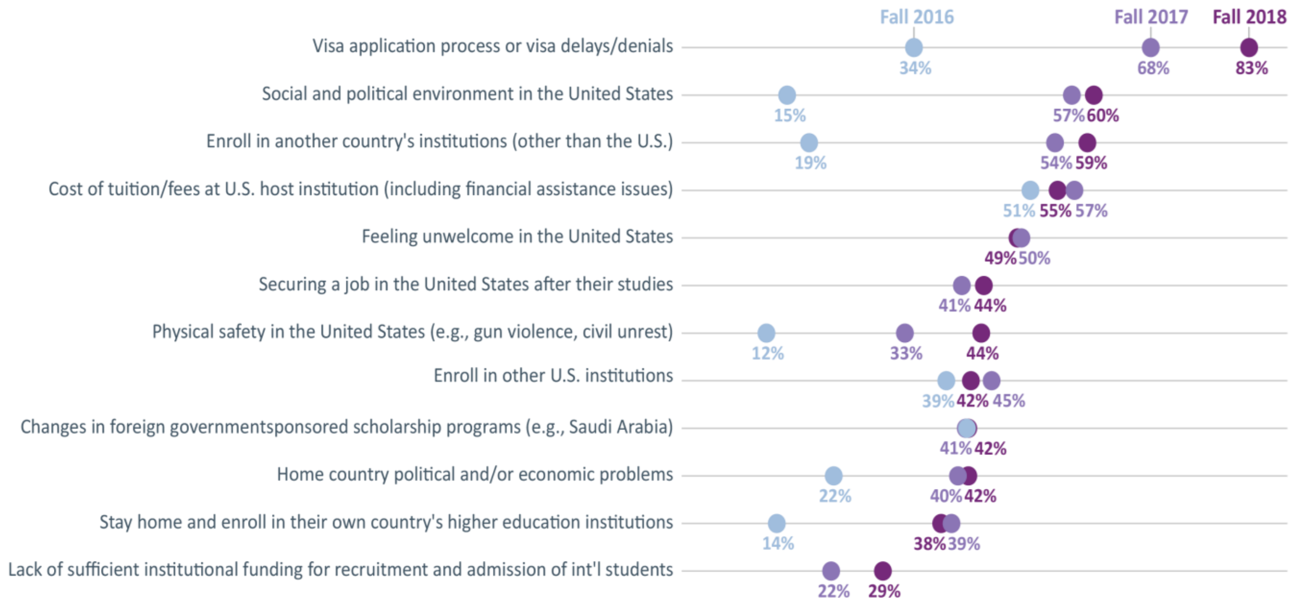


*Figure 5. Top 12 Reasons for Declining International Students, Fall 2016, Fall 2017, Fall 2018*

### Social and political climate

A significant proportion of institutions report that the U.S. social and political environment (60 percent) and feeling unwelcome in the United states (48.9 percent) are factors contributing to new international student declines. Colleges and universities also cite a significant increase (+11 percentage points) in concerns about physical safety in the United States to include gun violence and civil unrest (43.6 percent). Institutions continue to report that prospective international students and their families are concerned about the rhetoric surrounding the policies and ensuing public debates on immigration, along with apprehensions of personal safety and tense race relations.

### 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. Over 203,000 international students took advantage of Optional Practical Training (OPT) in 2017/18 after successfully completing their degree program *(Open Doors, 2018)*. Despite the growing number of students pursuing OPT, 44 percent of institutions report that concerns about being able to secure a job in the United States after their studies contributed to new student declines. Contributing to this concern is likely various proposed and implemented policy changes that may limit opportunities for international students to extend their time in the U.S. through work experience after completing their academic study.

### Global competition

For the second consecutive year, over half (59.1 percent) of the institutions with new enrollment declines cite that students are enrolling in another country's high education institution outside of their home country. Several institutions commented that they are noting increased global competition for talented international students, particularly from institutions in Canada, the UK, and Australia.

### Costs of U.S. higher education

The costs of U.S. higher education remain a perennial challenge in attracting international students with 54.7 percent of institutions citing costs as one of the reasons for falling new student enrollment. According to the U.S. Department of Education, the average costs for out-of-state tuition and fees at a public four-year institution has gone from approximately $20,600 in 2011/12 to $24,900 (+21 percent) in 2016/17. Private four-year institutions similarly climbed from $23,500 to $29,500 (+27 percent) over the same five-year timeframe (Digest of Education Statistics, 2012 & 2017). Several institutions also commented that the strong U.S. dollar has made the relative costs even higher due to currency exchange rates.

#### Changes in foreign government scholarships

Additionally, impacts of the shifts in the eligibility requirements of the government of Saudi Arabia's scholarship program resulted in dramatic declines of international students over the past two year with the number of students from Saudi Arabia falling from a peak of over 61,000 in 2015/16 to just over 44,000 in 2017/18 (*Open Doors*, 2018). These programmatic adjustments are likely still being felt as of Fall 2018 with 41.8 percent of institutions citing changes in foreign government programs as a reason for declining new international student enrollment, and 46 percent of institutions noting declines in new international student enrollment from Saudi Arabia.

### Reasons for increasing and stable enrollment

Although nearly half of all institutions report declines, it is important to note that approximately 44 percent of institutions describe growth and 7 percent cite stable new international student enrollment for Fall 2017. The top reasons colleges and universities cite for growth continue to be active recruitment efforts (58.1 percent), growing reputation and visibility of their institution (47.5 percent), and active outreach to admitted students (46.9 percent). For the first time this year, the survey asked about partnerships with recruitment agents, alumni engagement, and eliminating test scores required for admission. The number of institutions who reported these reasons remain small with only 26 percent of institutions attributing growth to increased partnerships with agents and even smaller proportions for the other categories. These developments will continue to be monitored in the future as institutions look to explore different ways to recruit international students in an increasingly competitive market.

## Concerns for next year's recruitment cycle

### For Fall 2019, institutions are concerned about recruitment of international students from Asia.

As colleges and universities welcome the Fall 2018 cohort to campus this year, many have already started recruitment for Fall 2019. In preparing their global outreach for the coming year, institutions indicate elevated concerns about recruitment in Asia compared with the prior year. The increasing levels of concern may be due to the fact that nearly 70 percent of all international students are Asian, with China and India alone sending over half a million students to the United States in 2017/18 (*Open Doors*, 2018). As such, even small shifts in Asian students' plans to pursue higher education in the United States could have a large impact on overall international enrollment.

According to *Open Doors* 2018, there was a flattening in international student enrollment growth from Asia in 2017/18 with Chinese student growth slowing and enrolled students from India declining due to a notable 8.8 percent drop in graduate students. These trends may continue, as 48.4 percent of the institutions responding to Hot Topics indicate decreases in new Chinese enrollment and 41.5 percent cite declining new enrollment from India in Fall 2018.

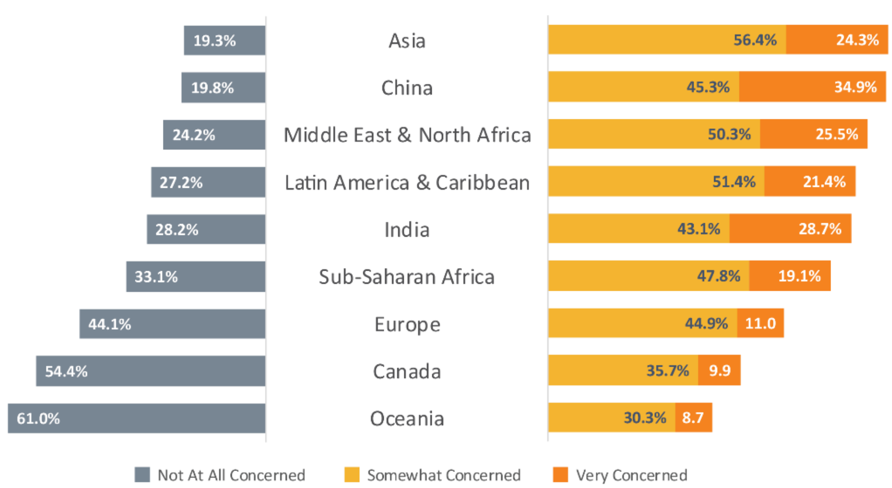


*Figure 6. Level of concern for Fall 2019 recruitment by world region*

As such, many institutions note increased concerns for the Fall 2019 cohort of international students. Approximately 80.7 percent of institutions report worries about future enrollment from Asian countries outside of China and India (+8 percentage points), 80.2 percent have concerns about China (+9 percentage points), and 71.8 percent cite apprehensions about India (+4 percentage points).

### Institutions continue to prioritize outreach to Asia

With concerns around potential declines, many institutions report proactively conducting global outreach to prepare for the Fall 2019 international student cohort, with a continued focus on Asia. Nearly two-thirds of institutions cite prioritizing efforts on China, while approximately half of all reporting institutions are directing recruitment energies to India (50.3 percent) and Vietnam (50.3 percent). Outside of Asia, institutions are increasingly citing recruitment efforts in Brazil (31 percent), which exhibited strong double-digit growth of 11.7 percent in *Open Doors* 2018.

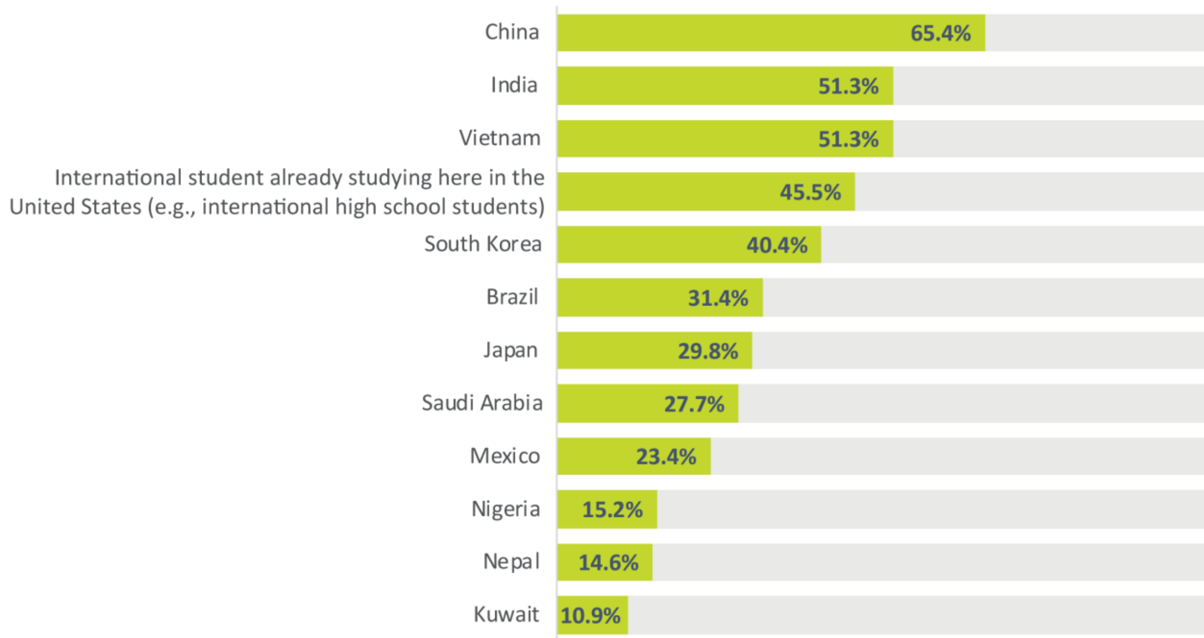


*Figure 7. Priorities for Fall 2018 recruitment and outreach*

### Recruiting international students from U.S. High Schools

Among responding institutions, nearly half (45.5 percent) report prioritizing outreach and recruitment efforts for international students already pursuing educational activities in the United States. The high proportion of colleges and universities turning to U.S. based international student recruitment is likely due to the number of international high school students which grew from 73,000 in 2013 to nearly 82,000 in 2016 according to the report "Globally Mobile Youth: Trends in International Secondary Students in the United States, 2013-2016" (Farrugia, 2017).

## 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 affording the costs of tuition and living expenses (80.1 percent) and challenges in obtaining a visa (76.2 percent). Survey respondents also report that students may have difficulties in providing official academic documents (32.4 percent), completing admissions placement exams (29.3 percent), and affording large one-time costs, such as traveling to the United States (36.5 percent). Several institutions commented that students from select countries are also experiencing difficulties in accessing or transferring funds from their home country.

To address these barriers, 81.0 percent of institutions indicate providing supports or special accommodations to international students applying and enrolling from conflict areas. The majority of reporting institutions indicate 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 (59.4 percent). Many colleges and universities also provide assistance once students arrive on campus in the form of academic supports (49.3 percent) and counseling (53.0 percent). The larger problem of costs, however, remains challenging to address. Just under half of responding institutions (42.6 percent) indicate providing tuition waivers or scholarships and close to one-third (31 percent) offer work study opportunities. Some colleges and universities also provide financial support through waiving application fees (33 percent), room and board (8.4 percent) and loans (4.9 percent).

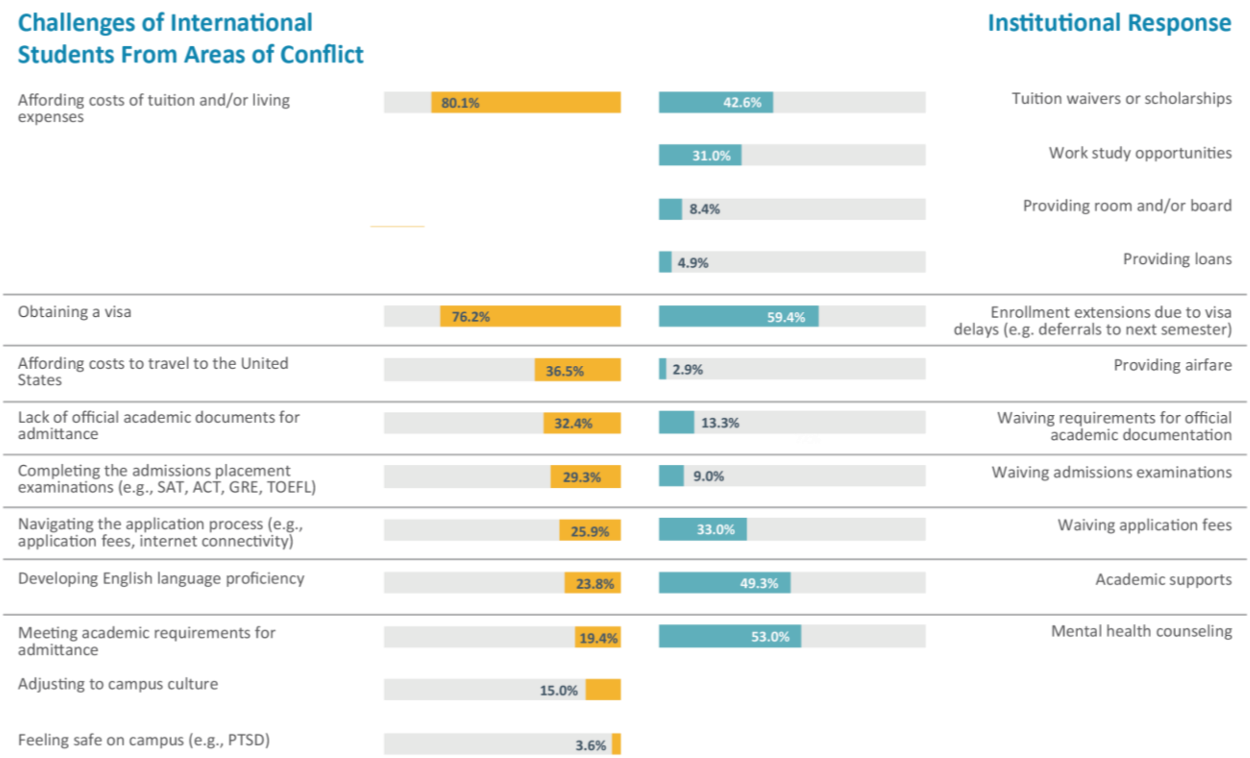


*Figure 8. Challenges in applying and enrolling students from conflict areas and institutional responses*

After finishing their studies, some international students from areas of conflict may have concerns about returning home to unsafe environments. In these situations, institutions have continued to provide the same type of advice they provide other international students about pursuing OPT (62.1 percent) or continuing degree studies (59.8 percent). Most institutions will also refer students to seek legal advice about relief that may be available to them (61.0 percent).

## Current U.S. Social & Political Climate

The United States and its higher education institutions have long been considered a welcoming environment for international students (see IIE, 2015). However, this perception may have shifted over the past several years, due to global and national dialogue on travel bans, immigration, personal safety due to gun violence, and race relations. While institutions often note that students on campus find themselves welcomed and supported, they remain particularly concerned that prospective international students may no longer perceive the United States as a welcoming and tolerant place to study. Consistent with the prior year, the vast majority (92 percent) of surveyed institutions report that the current U.S. social and political climate impacted their campus either positively or negatively.

Of the colleges and universities reporting impacts, survey respondents note that the U.S. social and political climate primarily negatively affected the attitudes and perceptions of international students. Institutions increasingly cite that the largest impact is among prospective international students citing the U.S. social and political climate as a potential deterrent to study in the United States (63.6 percent), up by 12 percentage points from the prior year. Additionally, 40.4 percent of institutions indicate that international students expressed feelings that they are not welcome in the United States.

Almost one quarter (24.0 percent) of institutions report that international students indicated the desire to leave or left the United States as a result of the current social and political landscape. Another area of concern, related to anti-immigration rhetoric, was that international students may be targeted at U.S. colleges and universities. A very small proportion of institutions (7.0 percent) report that an incident on campus or in the community targeted international students in a negative manner.

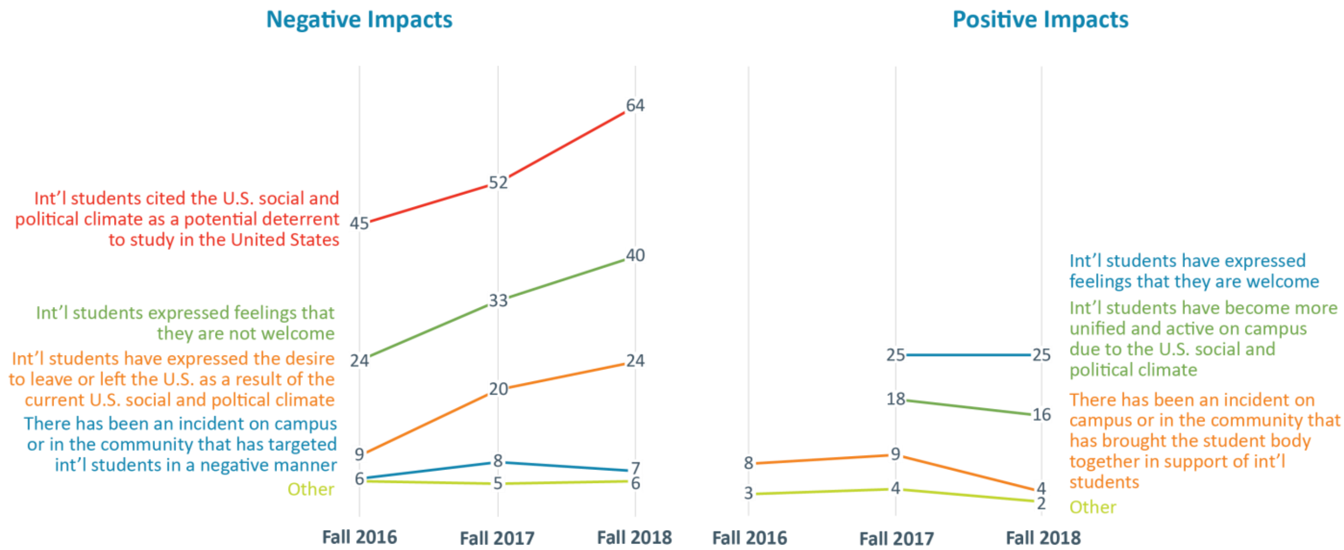


*Figure 9. Percent of respondents reporting negative and positive impacts of the U.S. social and political climate*

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 report working closely with international students on campus through alerting students about changes in U.S. policies (61.9 percent) and increasing the level of outreach to provide information to current and prospective students (56.2 percent). Over the past year, many colleges and universities also noted creating opportunities for international students to engage in or discuss events happening throughout the United States (43.6 percent) and providing counseling and mental health services to those concerned about the U.S. social and political climate (46.2 percent).

U.S. higher education institutions are also publicly advocating for international students by issuing public statements supporting international students on campus (48.3 percent) and releasing new social media campaigns (45.5 percent). The campaign #YouAreWelcomeHere, advanced nationally by Temple University, has continued to garner global attention with over 300 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, 57 colleges and universities have committed to providing scholarships to international students through the #YouAreWelcomeHere national scholarship program (YouAreWelcomeHere, 2018). Similar to last year, approximately one quarter (24.9 percent) of institutions indicate reaching out to Federal, state, and/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.

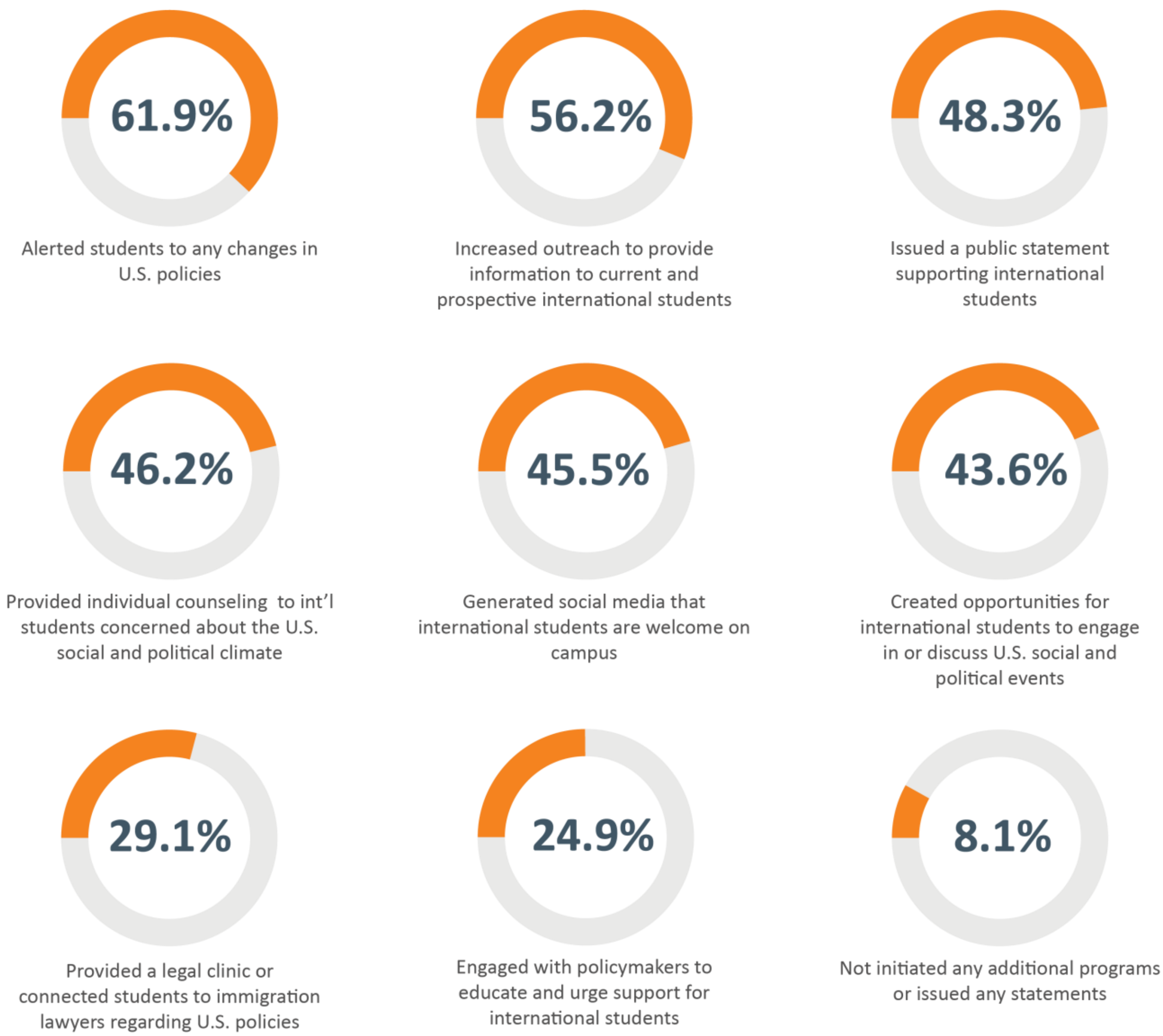


*Figure 10. Institutional responses to current U.S. social and political climate*

## Conclusion

International students contribute significantly to the research and entrepreneurial leadership of the United States, support over 455,000 U.S. jobs according to NAFSA, and added over $42.4 billion dollars to the U.S. economy in 2017 as key contributors to classrooms and communities across the United States (Anderson, 2016; U.S. Department of Commerce, 2018).

While international student enrollment continues to exhibit signs of a flattening, the overall numbers of international students in the United States are not expected to sharply decline in Fall 2018. Early indicators point to continued but a slowing decrease of 1.5 percent in new enrollment in Fall 2018 with approximately half of reporting institutions recording declines in Fall 2018. These institutions cite multiple factors, including visa difficulties, the U.S. social and political climate, the global competition for talent, 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 to prevent further declines.

Many institutions are already taking 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 in China, India, and Vietnam.

Faced with an increasingly globally competitive environment 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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