

## Trending Topics Survey: International Applicants for Fall 2017- Institutional & Applicant Perceptions



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Survey Data Release

IN COOPERATION WITH





# TRENDING TOPICS SURVEY: INTERNATIONAL APPLICANTS FOR FALL 2017- INSTITUTIONAL & APPLICANT PERCEPTIONS

## INTRODUCTION

Over the past year, international educators expressed concern that the political discourse surrounding foreign nationals in the U.S. leading up to the November 2016 presidential election could be damaging to international student recruitment efforts. In response to those voiced concerns, a coalition of five higher education associations launched an inter-association member survey in February 2017.

This survey was intended to capture a snapshot of student and family perceptions and institutional activities. It is not a deep-dive into applicant numbers. Partners such as the Institute of International Education (IIE), which publishes the annual *Open Doors Report*<sup>1</sup>, and the Council of Graduate Schools, which publishes the annual *International Graduate Application and Enrollment Report*<sup>2</sup>, conduct thorough research on international student enrollment trends. Because of the annual and in-depth nature of those reports, we will not see those numbers for many months. The data in this report provides a brief glimpse into the number of foreign applications to U.S. higher education institutions to date for Fall 2017 and summarizes the concerns expressed by prospective international students and their families. The data should assist institutions as they forecast and prepare for what might lie ahead. There are a number of key indicators tracked in an admissions cycle; application rate is one indicator that can give an institution benchmark information at a point early enough in the cycle to adjust strategy to have a positive impact on the ultimate enrollment number.

The almost 300 (n=294) respondents were institution-based professionals engaged in recruitment of international students for study in the U.S.

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<sup>1</sup> <https://www.iie.org/opendoors>

<sup>2</sup> <http://cgsnet.org/international-graduate-admissions-survey>

## KEY FINDINGS

- International student recruitment professionals report hearing a great deal of concern from students and families all over the globe, with the highest percentage of concerns emanating from the Middle East (79%), India (46%), Asia excluding China and India (36%), and Latin America (34%) [See figure 4].
- The most frequently noted concerns from international students and their families, as reported by institution-based professionals, include:
  - The perception of a rise in student visa denials at U.S. embassies and consulates in China, India and Nepal.
  - The perception that the climate in the U.S. is now less welcoming to individuals from other countries.
  - Concerns that benefits and restrictions around visas could change, especially around the ability to travel, re-entry after travel, and employment opportunities.
  - Concerns that the Executive Order travel ban might expand to include additional countries.
- 77% of institutions expressed concerns regarding application yield, with data that aligns closely to the countries of concern.
- Applicants from Africa do not appear to have the same level of concerns as those from other regions or countries.
- 38% of responding institutions report a decline in international applications, 35% reported an increase, and 27% reported no change in applicant numbers.
- More institutions report declines in their applications from the Middle East than any other region. **Open Doors** data from the 2015/2016 academic year indicates that there are more than 100,000 students studying in the U.S. from the Middle East, making up just under 10% of our international student enrollment nationwide. In our snapshot survey:
  - 40% of institutions report declines in undergraduate applications for Fall 2017 from the Middle East.
  - 31% of institutions report declines in graduate applications for Fall 2017 from the Middle East.
- Institutions also report that applications from India and China have been impacted. **Open Doors** 2016 indicates that these two countries currently make up 47% of our international student enrollment, with almost half a million Indian and Chinese students studying in the U.S.
  - 26% of institutions report undergraduate application declines from India and 24% report undergraduate application declines from China.
  - 15% have reported graduate application declines from India, and 32% of institutions report graduate application declines from China.
- International Applications in Africa appear to not be impacted a great deal by expressed concerns. Applications in the region remained relatively stable or increased for Fall 2017. Despite the stability of Africa applications, that is not likely to have a hugely stabilizing effect on overall numbers because the students account for just 3% of all international students in the U.S.

## RESPONDENT PROFILE

The institutional characteristics of the respondents represented institutions of various enrollments, sizes, educational offerings, and geographic diversity of higher education in the U.S. (Figures 1, 2 and 3). Respondents were nearly evenly split between public (52%) and private institutions (47%), with only a small number of proprietary institutions reporting (1%).

Figure 1: Respondents by U.S. Census Region

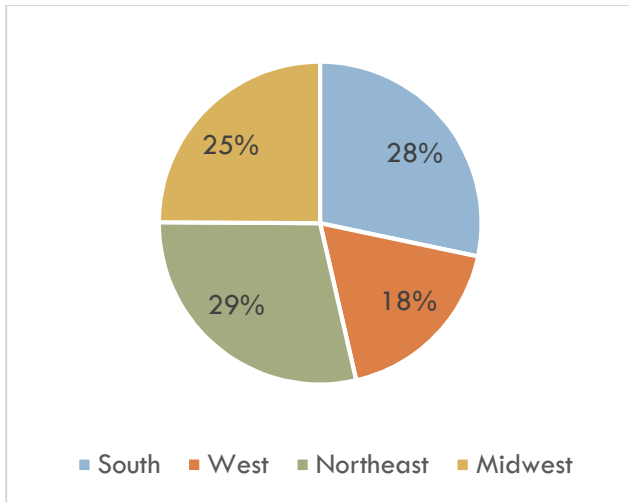


Figure 2: Respondents by Enrollment

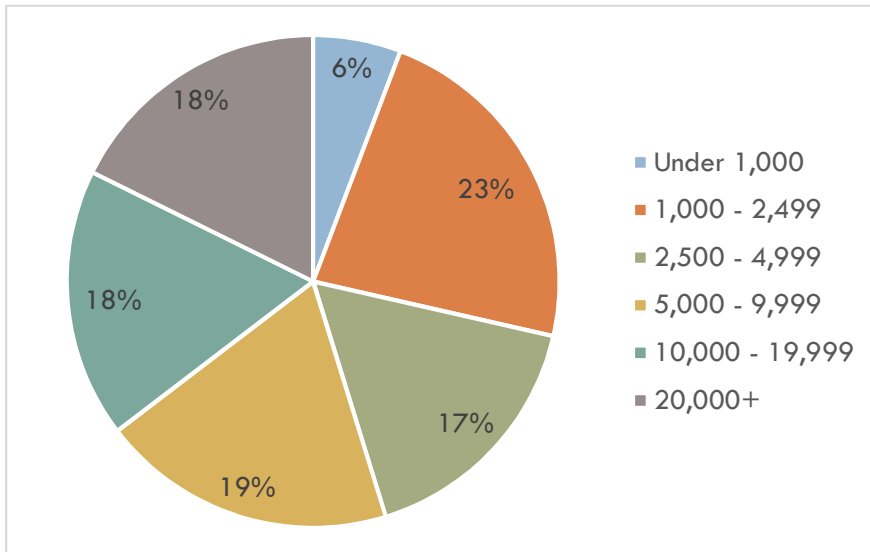
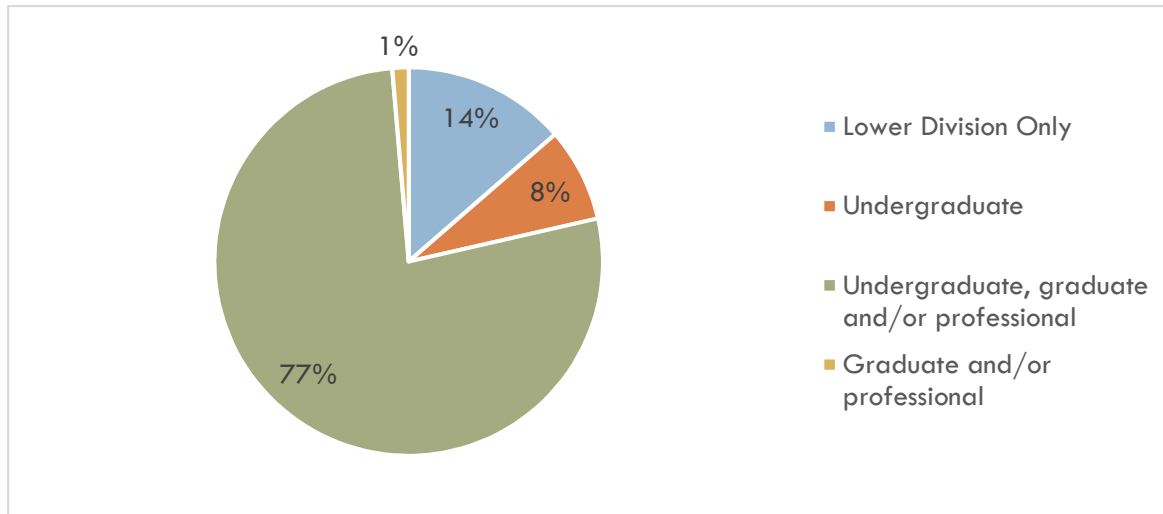


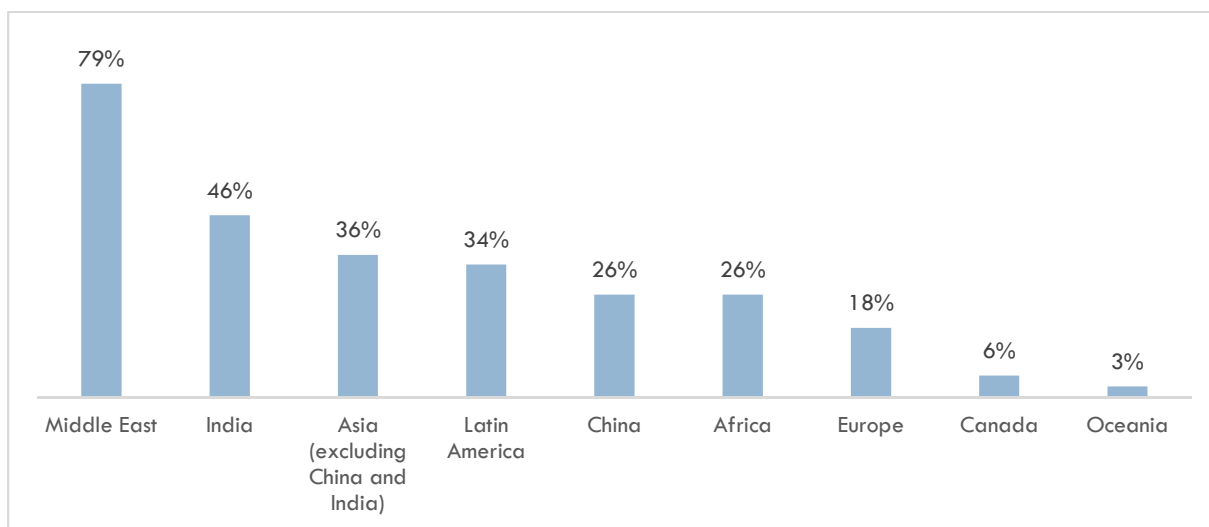
Figure 3: Educational Offering



### CONCERNS EXPRESSED BY INTERNATIONAL APPLICANTS AND/OR THEIR FAMILIES

International student recruitment professionals report that they are hearing great deal of concern from students and families all over the globe, with the highest percentage of concerns emanating from the Middle East (79%), India (46%), Asia excluding China and India (36%), and Latin America (34%) (Figure4). Analysis of the survey responses by enrollment or geographic region did not vary the results in any significant way. However, the locations from where the highest levels of concern were reported correspond highly to the regions targeted in the political rhetoric of the past year.

Figure 4: Percentage of Institutions Reporting Concern by Region or Country



The open-ended responses about concerns were coded by keyword and then grouped thematically. Most regions had similar concerns. Immigration policies were the top concern, with some combination of a sense of an unwelcome climate, political instability, economic issues, and employment for other concerns.

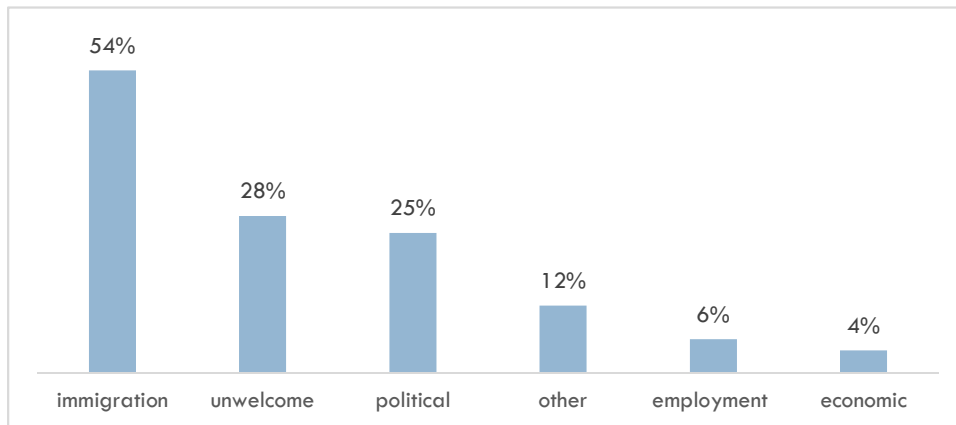
The immigration theme included concerns around obtaining and maintaining a visa, traveling while on a visa, changes in visa requirements and/or benefits, and general fear around instability or bias of the process. During the Feb 2017 survey period, a Temporary Restraining Order halted the impact of the January 27 Executive order, which would have delayed visa issuances in seven Middle Eastern/North African countries (Iran, Iraq, Libya, Somalia, Sudan, Syria and Yemen). Yet the survey reported a perception of an increase in visa denials from several regions. The comments around the unwelcome climate theme included concerns around xenophobia, anti-Muslim sentiment, discrimination, and the general climate in the U.S., especially toward international students. The political theme included concerns about instability of U.S. leadership and/or administration. Economic concerns mainly centered on economic issues in the home country. Employment concerns revolved around the Optional Practical Training (OPT), the H1B process, and fears that employment benefits of student visas would no longer exist.

Summarized visually below are the concern themes of prospective students, applicants, and/or their families by region or country. Note that the regions of Oceania and Canada are not reflected in these summaries, as the noted sample sizes were not large enough to provide relevant data.

### The Middle East

The concerns from the Middle East naturally grouped around five themes: Immigration, unwelcome, political, employment and economic. The “other” category included comments not easily categorized or not specific enough to be included in one of the other themes.

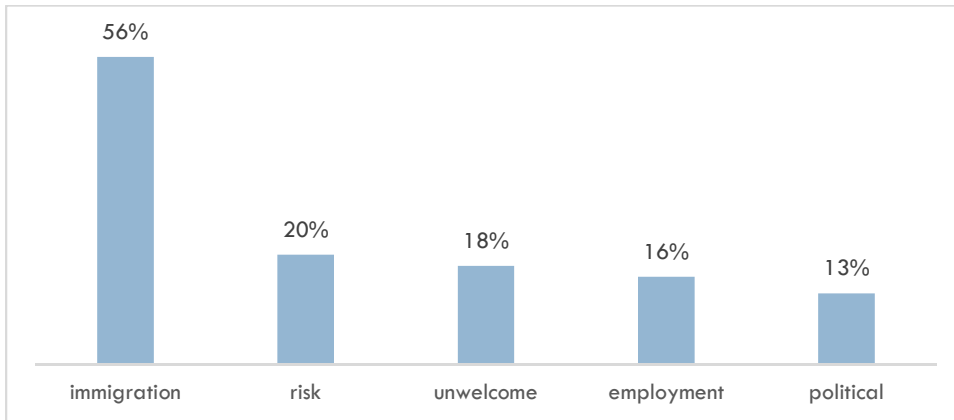
Figure 5: Thematic Concerns Expressed by Prospective International Students and/or Their Families from the Middle East



### China

The theme of risk was specific to China, capturing concerns that encompass fear, safety, and general unspecified worry.

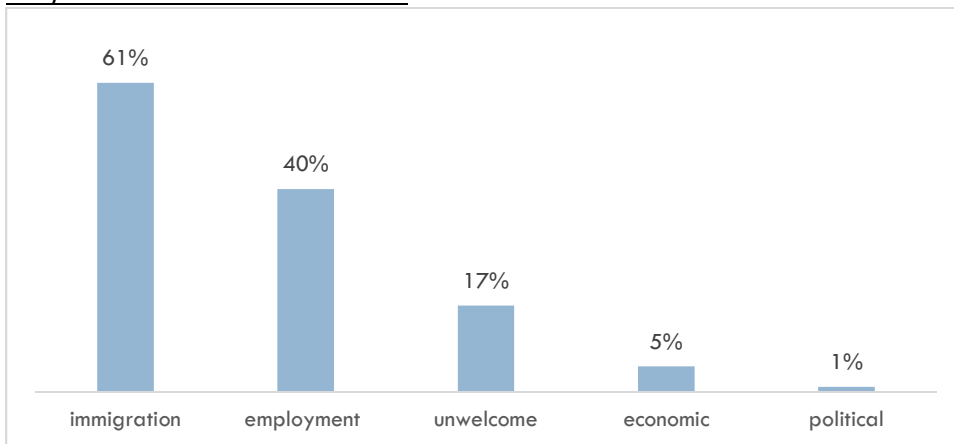
Figure 6: Thematic Concerns Expressed by Prospective International Students and/or Their Families from China



### India

The concerns from India reflected the highest number of both immigration and employment-related concerns.

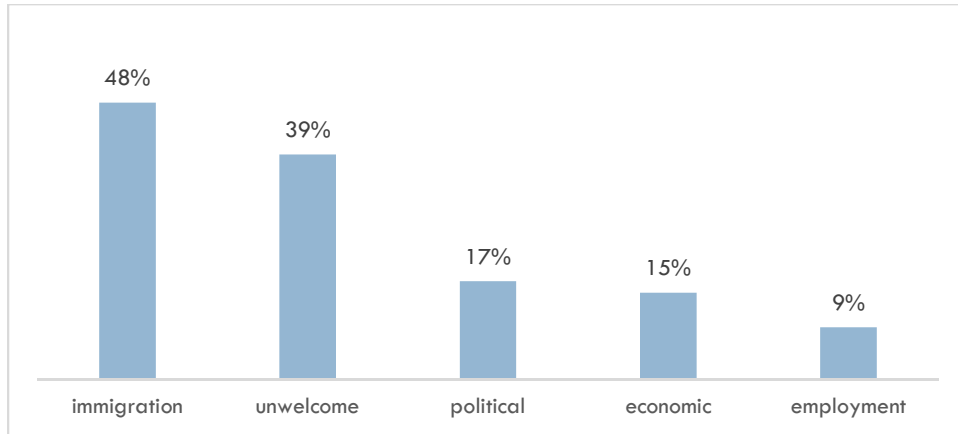
Figure 7: Thematic Concerns Expressed by Prospective International Students and/or Their Families from India



**Latin America**

Immigration policies and an unwelcome climate are the top concerns for Latin America. The political tension between the United States and Mexico has clearly impacted the desirability of the U.S. as well. The economic concerns expressed by Latin American prospective students are tied more closely to local economies of the respective countries than to any development in the U.S. and are likely a contributing factor to the decline in applications.

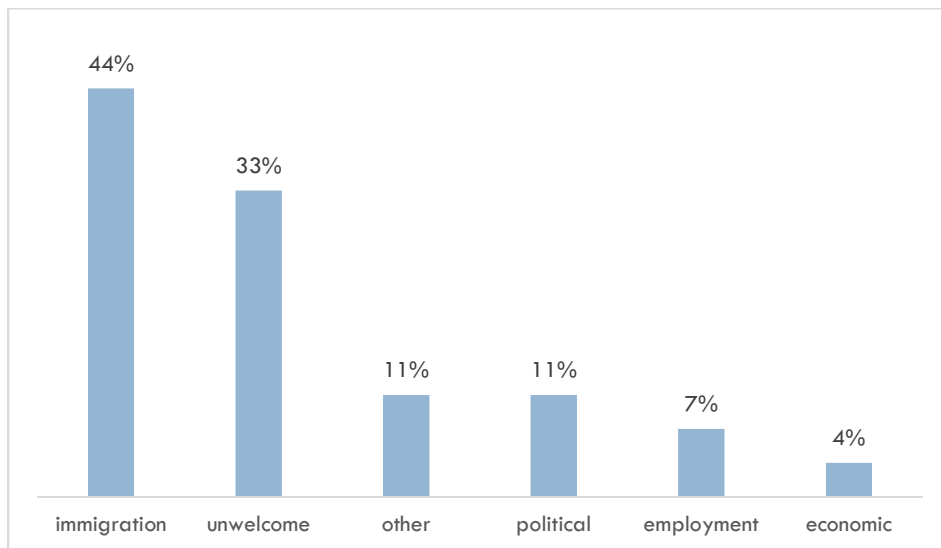
Figure 8: Thematic Concerns Expressed by Prospective International Students and/or Their Families from Latin America



**Europe**

It is interesting to note that the concerns expressed by students and families from Europe mirror those from other regions. The survey data was collected before the proposed changes to the visa waiver program.

Figure 9: Thematic Concerns Expressed by Prospective Students and/or their Families from Europe





## Africa

The specific concerns voiced by students from Africa are mainly around two specific themes, listed in order of frequency:

- Concerns having to do with discrimination based on their Muslim faith.
- Concerns around visa issues--processing, denials, and the ability to travel once admitted to the U.S.

## GENERAL STATE OF APPLICATION POOL

Nearly 40% of institutions reported an overall decrease in international student applications, and 27% of institutions reported no change from the previous year (Figure 10). This is significant, as enrollments have been rising for nearly a decade. This snapshot data could be an early indicator of a potential slowdown or decrease in international student enrollments for the Fall 2017 enrollment period.

Figure 10: Overall Number of International Applications for Fall 2017 as Compared to the Previous Year

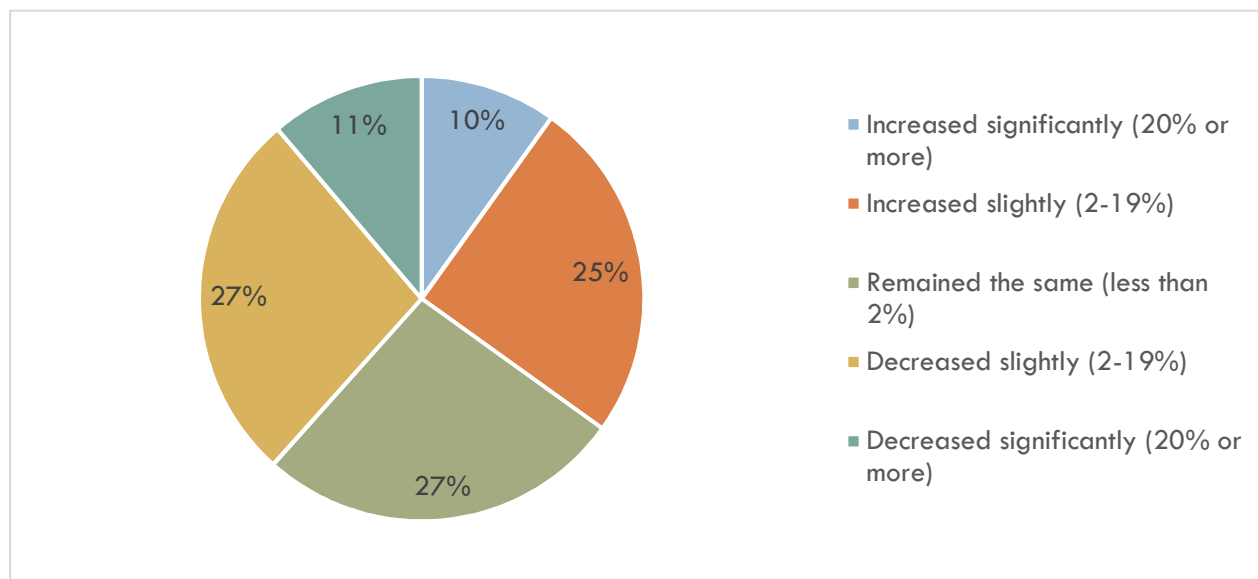


Figure 11: Change in the Percentage of International Undergraduate Applications for Fall 2017

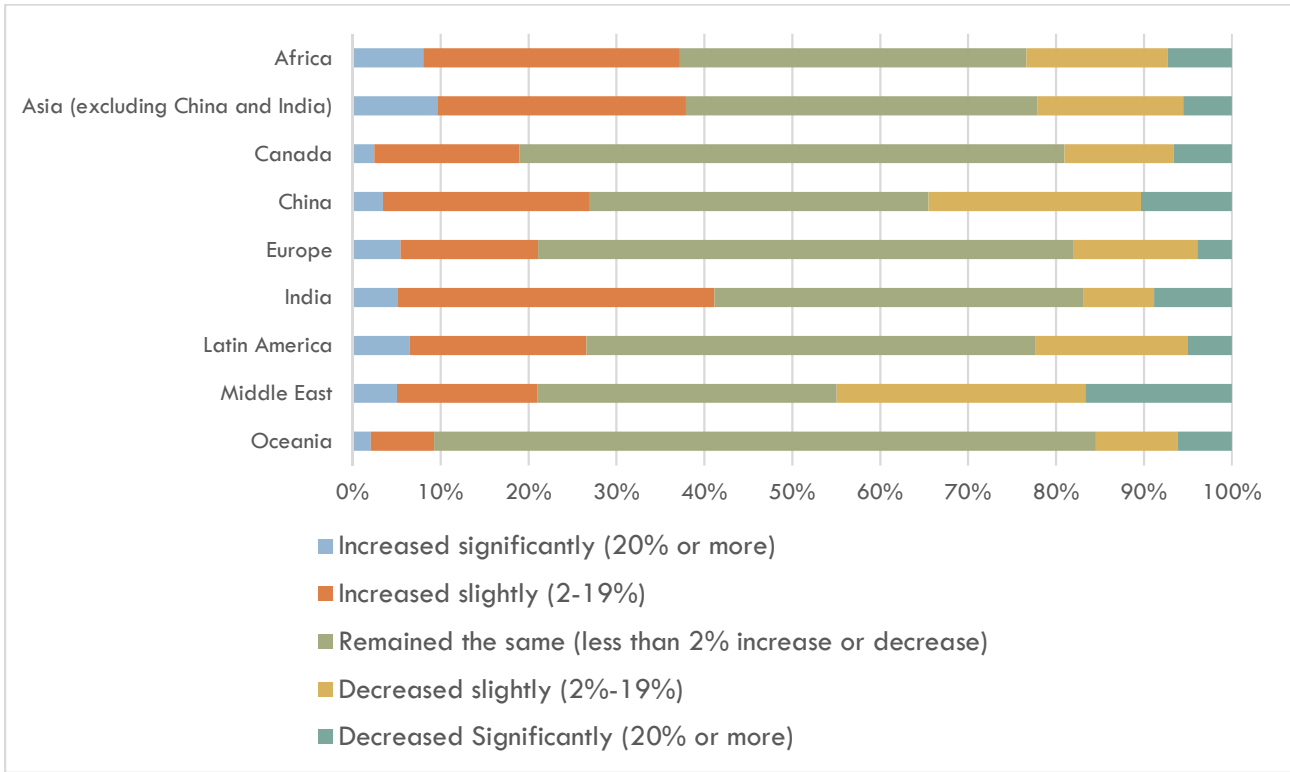
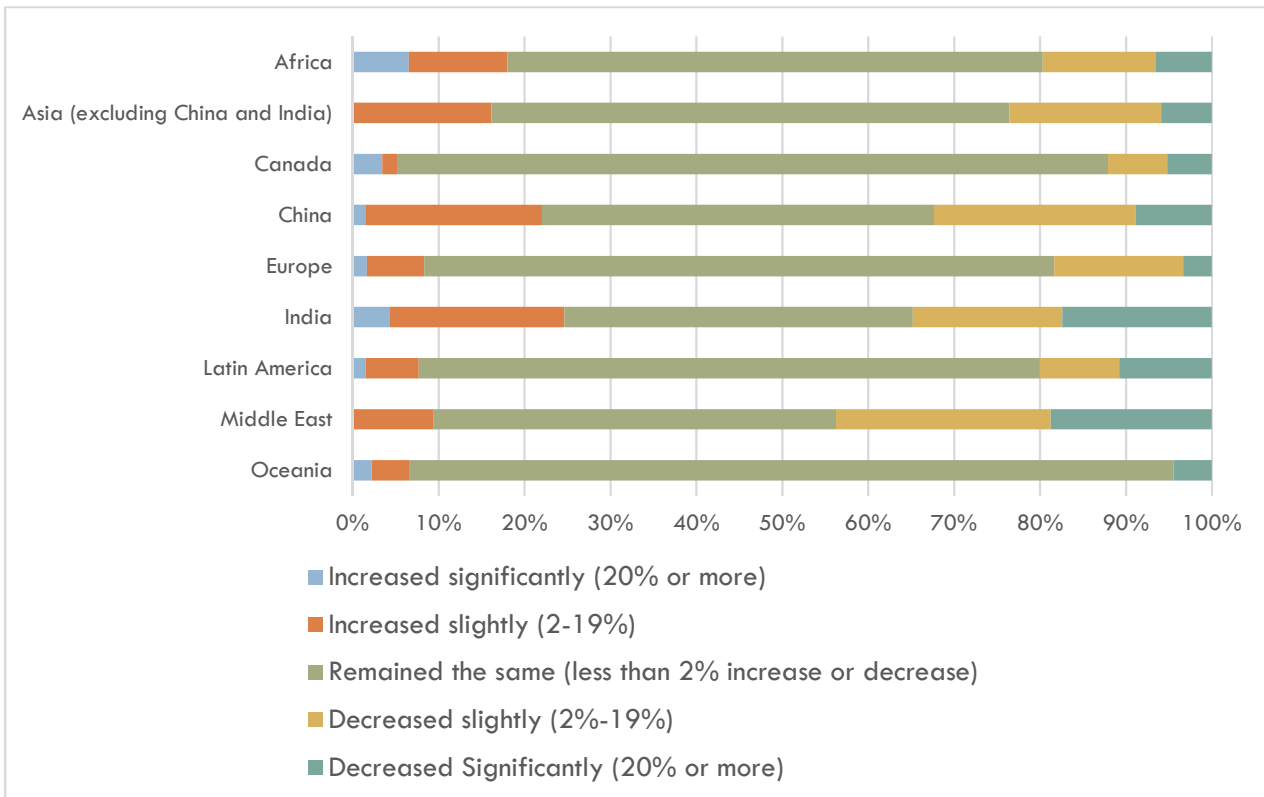


Figure 12: Change in the Percentage of International Graduate Applications for Fall 2017



A closer look at institutional demographics shows institutions over 5,000 students reported more declines than smaller institutions. Institutions over 10,000 students are showing a moderate decline in applications, while smaller institutions appear to be relatively flat.

### APPLICANT POOL REGIONAL HIGHLIGHT: AFRICA

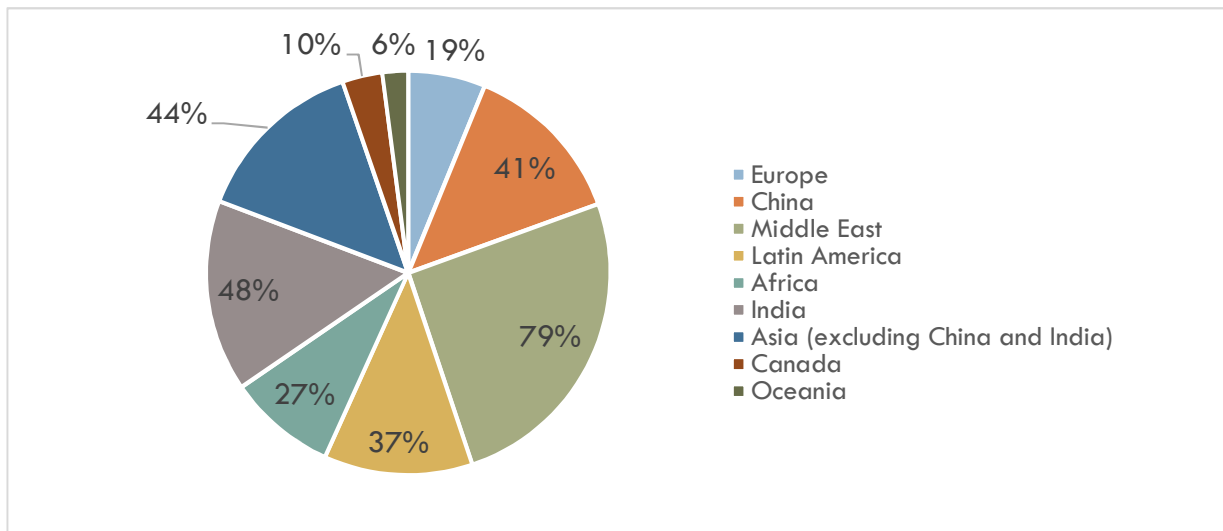
A reading of the data for some regions supports a more positive outlook on enrollments. When considering Africa alone, the majority of institutions who reported indicate that applications remained relatively flat or increased slightly. At the undergraduate level, more institutions reported an increase in applicant numbers than decreases. At the graduate level, the majority of institutions reported relatively unchanged numbers from previous years.

Despite the relatively stable applicant pool, more than a quarter of institutions have reported feedback from prospective students from Africa that is concerning. Despite the stability of applications from the region, it is not likely to have a hugely stabilizing effect on overall enrollment numbers because students from Africa account for just 3% of all international students in the U.S.

### ENROLLMENT YIELD CONCERNS AND INSTITUTIONAL MITIGATION

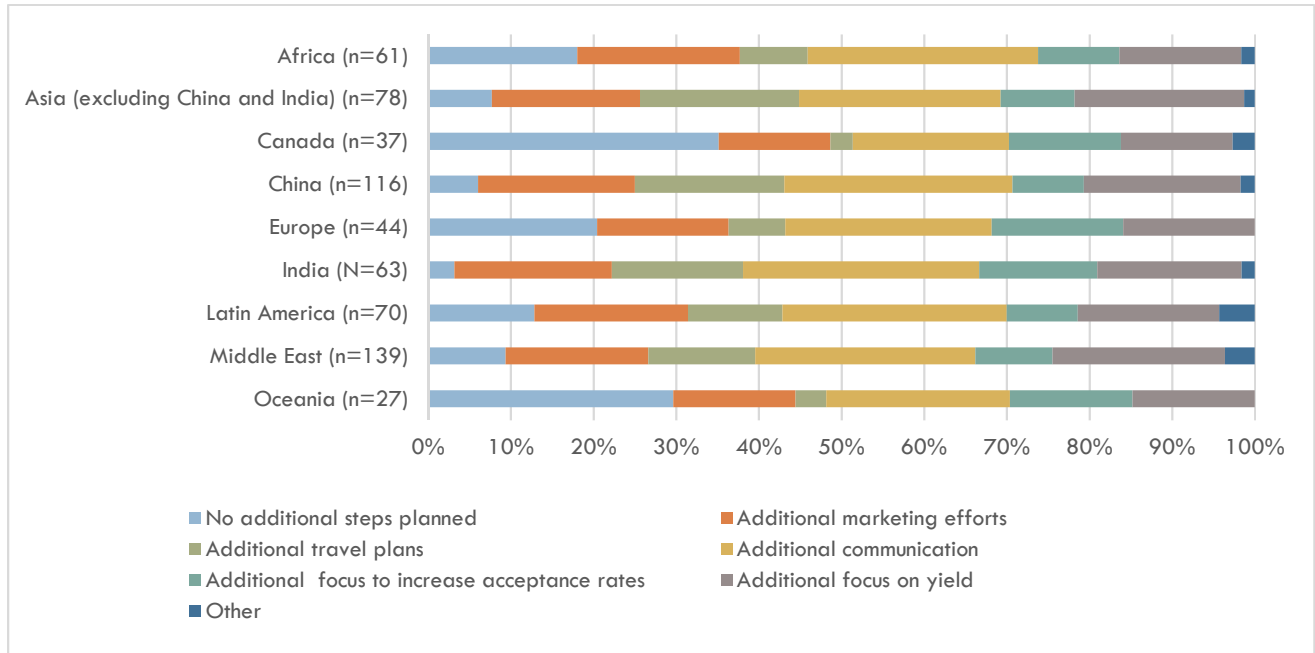
The data suggests institutions are cognizant of this enrollment cycle’s risks to their applicant pool size and ability to yield students from that pool and have planned accordingly. Institutions reporting concern regarding the potential applicant yield closely aligns with the data indicating regions from where students are expressing concerns about U.S. study.

Figure 13: Region/Country for Which Concern Exists about the Yield of Admitted Undergraduate Students



Institutions report a variety of methods to mitigate possible concerns around yield. Initiatives included increased communication, travel and marketing, as well as applying additional focus on file completion, and the possibility of an increased acceptance rate to offset a possibly lower yield.

**Figure 14: Institutional Initiatives to Address Decline in Undergraduate Applications**



Institution enrollment appears to have an impact on the type of mitigation that was planned. The smallest institutions have yet to take action, most likely because they represent the sector with the least ability to flex their recruitment plans due to both human and financial resource constraints. Larger institutions are investing human resources in more communication, file completion and file review, other internal yield efforts, and at the same time investing financial resources in travel and marketing.

## CONCLUSION

It is clear that the political rhetoric of the 2016 election and the Executive Orders of the new administration have added complexity to the international recruitment efforts of U.S. higher education institutions. While some institutions have initiated efforts to mitigate the possible negative enrollment impact, there remains more work to be done. It is critical for institutions and member associations to be advocates and evangelists to the U.S. administration, to help them understand the importance of international education for our students, our colleges and universities, and our country.

The results of this survey do not necessarily point to a definite decline in international enrollment. The data merely serves as an early warning sign of potential declines. Application numbers are but a single benchmark along the admissions cycle. There are multiple points between application and enrollment that

can have an impact on the final yield of international students. The challenge for institutions is to craft appropriate messages to their recruitment regions that will reassure students and their families that an education in the United States remains a strong option.

Ultimately, U.S. higher education institutions are independent of the U.S. administration. Despite negative rhetoric occurring in the political sphere, international students remain a central component of the internationalization efforts of U.S. institutions. Campuses strive to create a campus community that is reflective of the global society in order to ensure that its students develop the skills required for success. International education is at the heart of U.S. higher education. The positions of the current administration will not change the dispositions of individual institutions. International students will continue to be welcome.