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# WES-AASCU 2017 JOINT RESEARCH PROJECT ON INTERNATIONAL ENROLLMENT

**Jean Cui**

Research Associate, WES Research

**Paul Schulmann**

Research Manager, WES Research

# Background of the Study

# About the Research Partners

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[AASCU](#) is a Washington D.C.-based higher education association of nearly 420 public colleges, universities and systems whose members share a learning- and teaching-centered culture, a historic commitment to underserved student populations and a dedication to research and creativity that advances their regions' economic progress and cultural development.

Founded in 1974, [World Education Services \(WES\)](#) is a non-profit organization dedicated to helping individuals achieve their higher education and professional goals by evaluating and advocating for the recognition of international education qualifications.

With a staff representing 37 nations and speaking over 40 languages, WES has delivered evaluations to more than 1.5 million people worldwide that are recognized by more than 2,500 educational, business, and governmental institutions throughout the U.S. & Canada.

WES has set the standard of excellence in the field of international mobility with our world-class credential evaluations, research, training, and ongoing support for international students and skilled immigrants in the U.S. and Canada.

# Project Overview

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## Objectives:

- A follow-up study to the 2015 report, *WES-AASCU Joint Research Project on International Enrollment*.
- To understand the strategic priorities and best practices that can help AASCU institutions diversify and grow their international student enrollment population in a sustainable manner.
- To investigate new trends and strategic priorities related to international student enrollment at member institutions and measure changes since 2015.

## Method:

- Online survey of AASCU members
  - Invitation sent by AASCU
- Estimated total invitations: 385\*
  - Completed responses: 91
  - Valid responses for analysis: 85  
(remove 5 duplicated responses ->One response per institution)
  - Estimate response rate: 22%\*\*

## Notes:

\* Estimated total extracted from AASCU Member July 2016 from <http://www.aascu.org/members/by-state-and-territory/> excluding institutions located outside the U.S. and non-HEI organizations.

\*\* Response rate was generated based on the estimated number of total invitations (n=385).

# Limitations

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- Interpretation of results are based on the responding sample and may or may not reflect the AASCU population.
- The profile of responding institutions by region and Carnegie classification are significantly different compared to the 2015 sample. ([See slide 17](#))
- Changes to some questions in the 2017 survey may impact the comparability of some of the findings.
  - Changes to the survey include adding additional choices (*see footnotes for reference*) or changing the type of question from an open-ended question to a multiple choice question. This could cause incomparability if looking at percentage only; instead, looking at the preference of choices is more appropriate.
- Although the survey sample consisted of only AASCU institutions, the survey is not longitudinal as some institutions participated in 2015 but not in 2017. As such the results, especially the comparison analysis, should be viewed as general trends for AASCU members.

# Glossary

## Geographic Region

## Size and Setting\*

Geographic Region		Size and Setting*	
	Regions	States	
West	Far West	AK CA HI NV OR WA	Large
	Rocky Mountains	CO ID MT UT WY	
Mid-West	Great Lakes	IL IN MI OH WI	Medium
	Plains	IA KS MN MO NE ND SD	
	Mid East	DE DC MD NJ NY PA	Small
	New England	CT ME MA NH RI VT	
	Southeast	AL AR FL GA KY LA MS NC SC TN VA WV	
	Southwest	AZ NM OK TX	

Size	Description
Large	four-year, primarily nonresidential four-year, primarily residential four-year, highly residential <b>More than 10,000 FTEs</b>
Medium	four-year, primarily nonresidential four-year, primarily residential four-year, highly residential <b>At least 3,000 but fewer than 10,000 FTEs</b>
Small	four-year, primarily nonresidential four-year, primarily residential four-year, highly residential <b>At least 1,000 but fewer than 3,000 FTEs</b>

**Source:** Based on institutions profile data collected from IPEDS

\*According to IPEDS, this classification describes institutions' size and residential character. Because residential character applies to the undergraduate student body, exclusively graduate/professional institutions are not included.

Size of the institutions is based on their full-time equivalent (FTE) enrollment and not on the basis of total enrollment. FTEs are calculated by adding the number of full-time students to one-third the number of part-time students.

# **Executive Summary**

Key Takeaways, What's changed,  
Recommendations

# Key Takeaways

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- As the size of the institution increases, it is more likely that they prioritize Strategic International Enrollment Management (SIEM) and develop a plan. [See slide 32](#)
- Institutions with international enrollment of 5.1% or more reported a decline in international student enrollment from the 2013/14 to 2015/16 academic year. [See slide 48](#)
- Primary reasons for developing an institution-wide SIEM plan: [See slide 33](#)
  1. To increase **international enrollment**
  2. To **internationalize** the institution
  3. To increase **diversity** on campus
- Increasing the number of international students is still the top priority for AASCU members in 2017, followed by developing strategic partnerships. [See slide 35](#)
- Large institutions are the most interested in developing strategic partnerships with institutions abroad. [See slide 36](#)
- Low brand awareness and lack of funding are still the top two challenges for AASCU Institutions in 2017, followed by the new political environment. [See slide 39](#)



# What's Changed Compared to 2015?

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## Enrollment

- The percentage of institutions reporting an increase in international enrollment dropped by half and nearly half of the reporting institutions saw no significant change in enrollment. [See slide 24](#)
- The number of responding institutions reporting an increase in international enrollment dropped from all regions in 2017 except for Mid East & New England. [See slide 25](#)
- The percentage of institutions reporting a drop in international enrollment increased significantly from the Southeast, Midwest and West regions. [See slide 25](#)
- The responding institutions in 2017 placed more emphasis on recruitment at the undergraduate level. [See slide 26](#)

# What's Changed Compared to 2015? (cont.)

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## Profile

- Institutions from the Midwest region were the most represented region in 2017, vs. Mid East & New England in 2015. [See slide 21](#)
- Fewer Medium-sized institutions participated in the survey in 2017. [See slide 20](#)
- The percentage of Master's institutions dipped by 20%, whereas Research/Doctoral institutions increased by 17%. [See slide 20](#)
- The proportion of respondents in each job title are comparable to 2015, *however*, 9% more respondents from senior level admissions took the survey corresponding with 6% fewer in senior level of IE programs. [See slide 17](#)

# What's Changed Compared to 2015? (cont.)

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## Overview of Internationalization

- In 2017, AASCU member institutions were more likely to have an SIEM Plan compared to 2015. [See slide 27](#)
- Institutions selected, “enhance the diversity of international students on campus” as a lower priority in 2017. [See slide 35](#)
- Nearly 30% more institutions in the West reported, “increasing the number of international students” as a high SIEM priority, compared to 2015, which reflects the fact that Western institutions witnessed no significant increase in international student enrollment in 2017. [See slide 37](#)
- Institutions with larger international enrollment size (5.1% or more) indicated that SIEM is not as high of a priority over the next three years compared to 2015. [See slide 30](#)
- International enrollment management at the institutional level has not been as well supported as it was in 2015. [See slide 52](#)

# Recommendation: Political Environment

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- Send clear messages to your international applicants and enrolled students that they are welcome and highly appreciated (e.g. using the **#YouAreWelcomeHere** hashtag on social media).
- Listen to your international students' experiences and provide timely support service in regards to **emotional and academic challenges, career expectations, questions about status**, etc.

"Raise awareness of elected officials about the critical importance of international students to the growth of US institutions, the overall economy of the country and its overall success. Current political discourse is harming the national interest of the country."

"The current political environment in the United States has been viewed negatively by those abroad. Policies, executive orders, etc. have negatively changed how the U.S. is perceived abroad thus making the job of attracting internationals to campuses in the U.S. more difficult."

***"We are closely watching the impact that the change in the Presidential Administration and recent Executive Orders on immigration has on applications, enrollment, and retention."***


# Recommendation: Budget Constraints

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"We recently hired a former Provost from Costa Rica to lead the establishment of partnerships at several Latin American universities. The purpose is for academic collaboration, study abroad, and student recruitment."



"We have adopted a Latin America strategy for academic partnerships, study abroad, and student recruitment..."



- Strategically allocate **scholarships** to increase applications, yield, and retention.
- **Partner** with other universities domestically and internationally in international student recruitment.
- Evaluate options with **third-party providers** in recruiting best-fit international student candidates.
- Promote **online** and **short-term programs** (e.g. summer programs for executives or high school students; certificate and exchange programs).

# Recommendation: Brand Management

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- Invite and train alumni, faculty and students to be “informed” **brand ambassadors** when abroad.
- **Adjust** your branding message to students based on country of origin, academic level and programs.
- Adopt **technology** to create responsive website design and strategic social media.

***“As a public institution with a regional focus within our state, an international perspective is not a part of institutional culture.”***

# Recommendation: Embrace Comprehensive Internationalization

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*“Our region attracts a large number of international employees. We attract these employees and spouses that are interested in our institution. The Office of Global Affairs and Admissions needs to work together in coordinating a SIEM plan.”*

“Incorporating a global perspective into the campus strategic plan...”

“Global Awareness Through Education is our Quality Enhancement Plan and weaves international in curricula...”

- Promote **global research and innovation programs** in your institution that are accessible to all students.
- Develop faculty and students’ **global competencies**.
- Support a **pervasive campus culture** that embraces internationalization to the benefit of all constituencies.
- Promote **hiring and orienting** new staff/faculty with an international mindset.

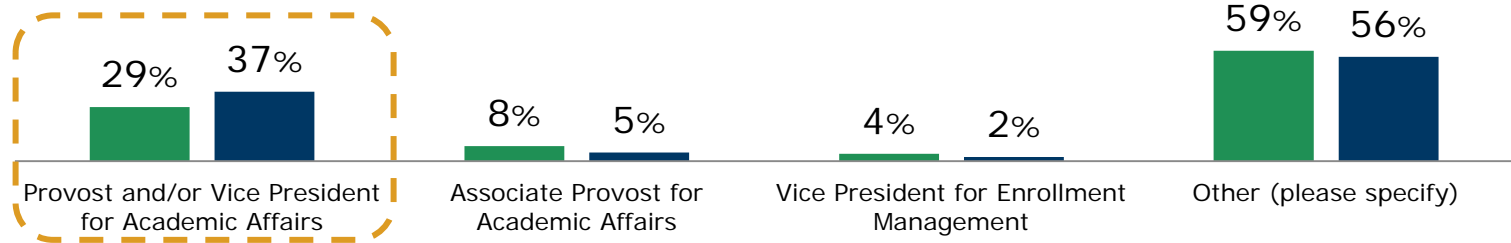
# Respondent and Institutional Profiles



# Respondent Profile: 2015 & 2017

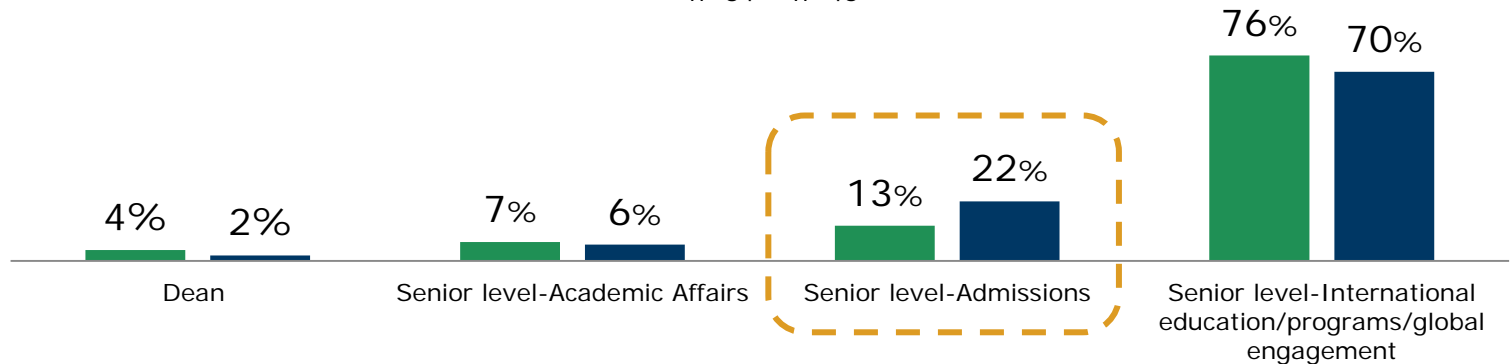
## Job Title

■ 2015 n=92 ■ 2017 n=86



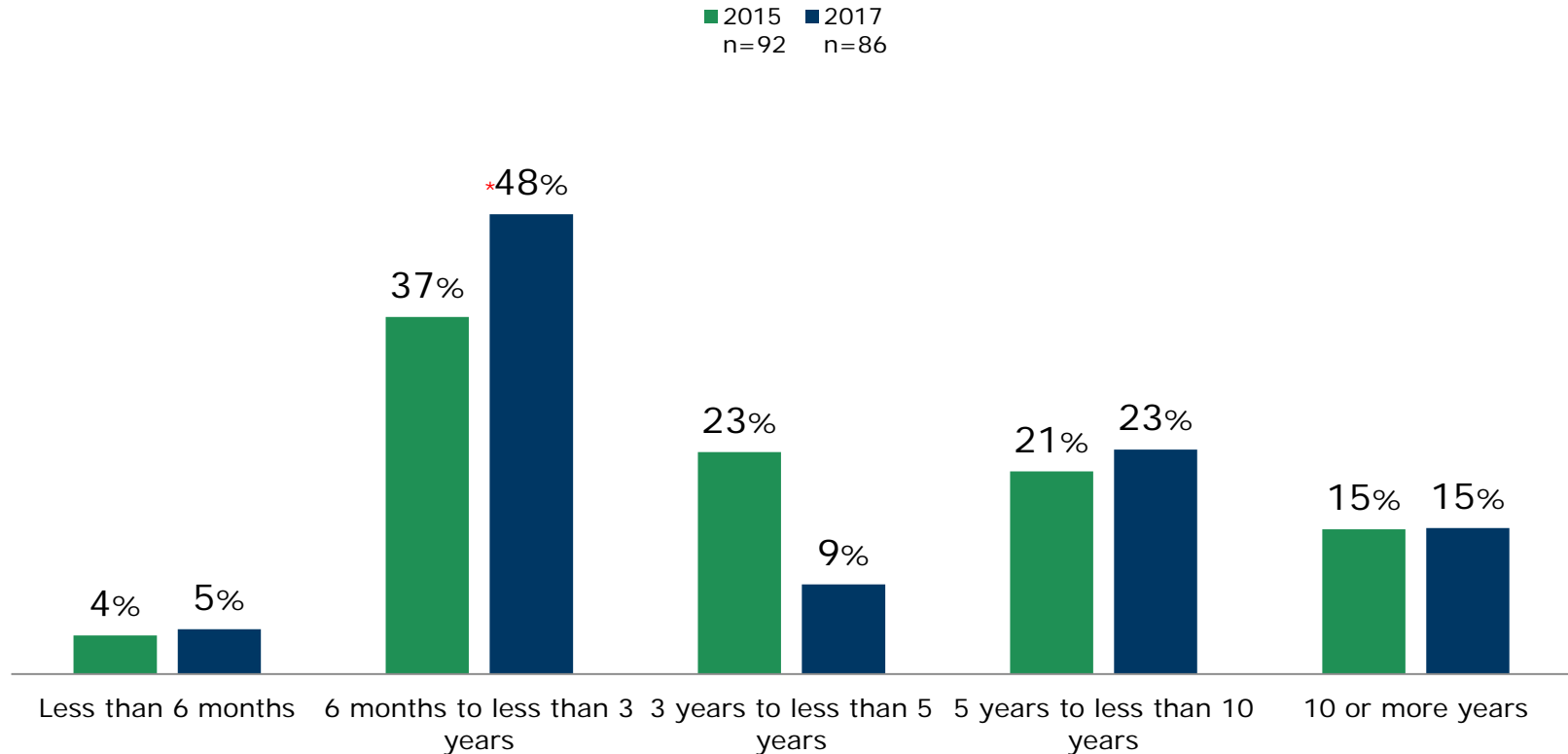
## Job Titles for Respondents mentioning "other"

■ 2015 n=34 ■ 2017 n=46



# Respondent Profile: 2015 & 2017 (Cont.)

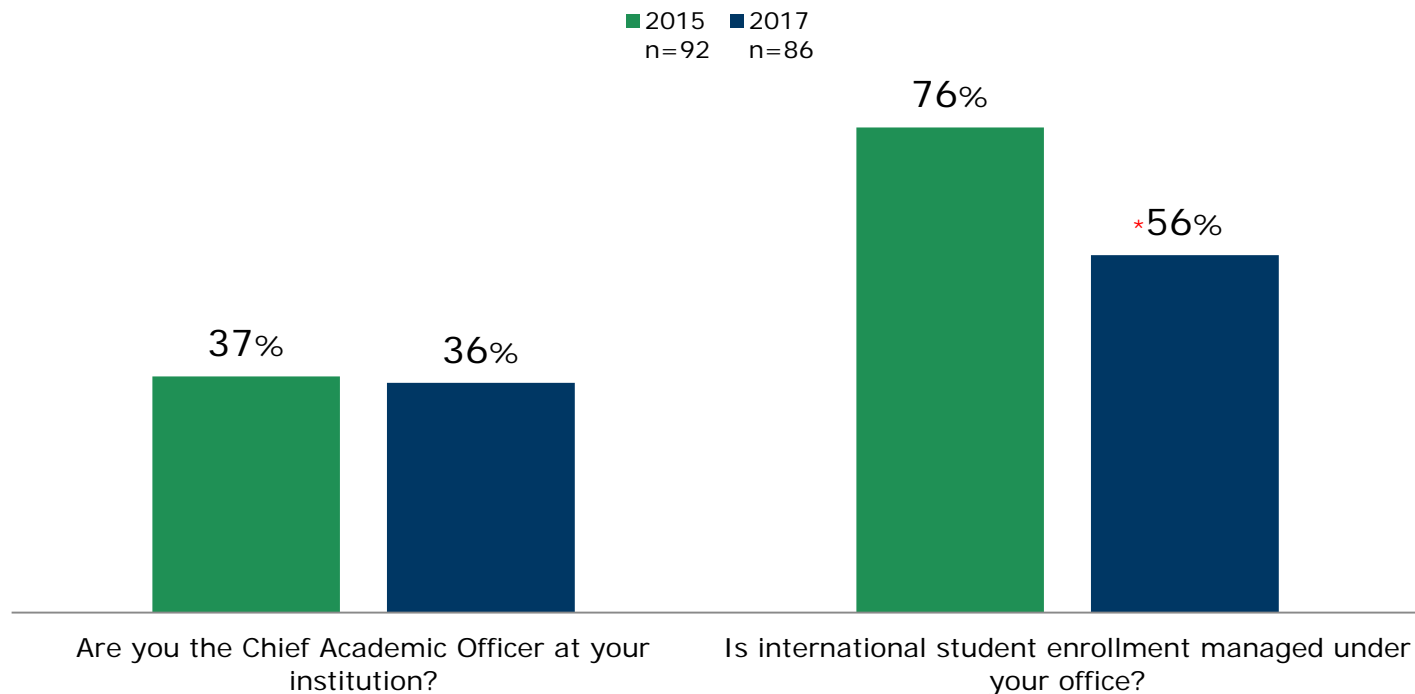
## Number of Years in Position



\* Nearly half of respondents in 2017 have been in their current job position for at least 6 months to less than 3 years.

# Respondent Profile: 2015 & 2017 (Cont.)

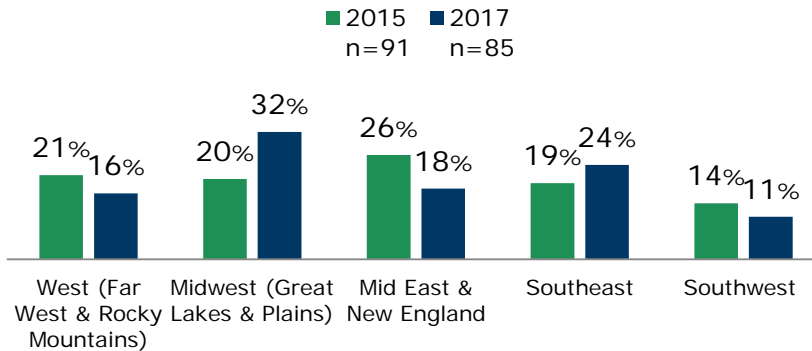
## CAO's & their Relationship with International Student Enrollment



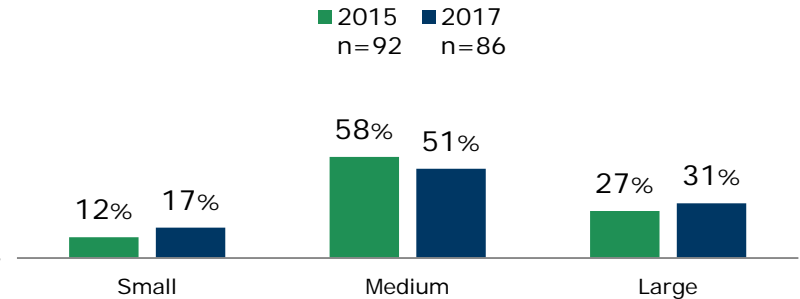
\* In 2017 fewer respondents indicated that international students enrollment is managed under their office.

# Institutional Profile: 2015 vs. 2017

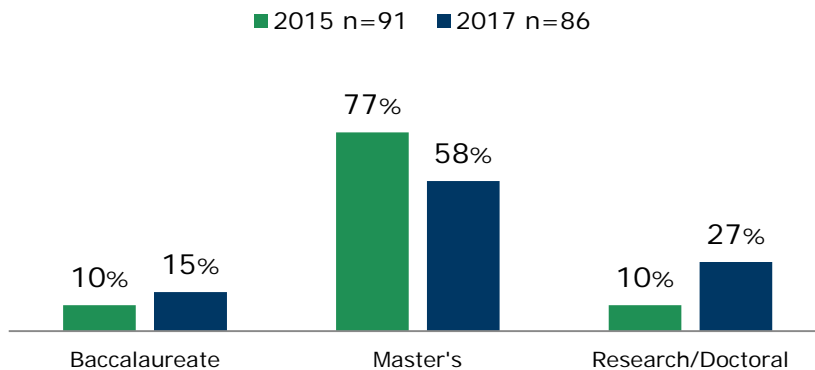
## Geographic Region



## Size & Setting of Institutions



## Carnegie Classification



### Changes in institutional profile:

- Institutions from the **Midwest region** were the most represented region in 2017, vs. Mid East & New England in 2015.
- **Fewer medium-size** institutions participated in the survey in 2017.
- Compared to 2015, the percentage of Master's institutions dipped by nearly 20%, whereas **Research/Doctoral institutions increased by 17%**.

# Profile of Survey Respondents is Representative of Overall AASCU Member Institutions

		Overall AASCU Institutions	Responding Institutions - 2015	Responding Institutions - 2017
Geographic Region	West ( Far West & Rocky Mountains)	14%	21%	16%
	Mid-West (Great Lakes & Plains)	23%	20%	32%
	Southeast	29%	19%	24%
	Mid-East & New England	23%	26%	18%
	Southwest	10%	14%	11%
Size & Setting	Very Small	3%	0%	0%
	Small	21%	12%	17%
	Medium	49%	58%	51%
	Large	27%	27%	31%
Carnegie Classification	Associates	1%	0%	0%
	Baccalaureate	15%	10%	15%
	Baccalaureate/Associates	3%	0%	0%
	Masters	62%	77%	58%
	Research/Doctoral	17%	10%	27%

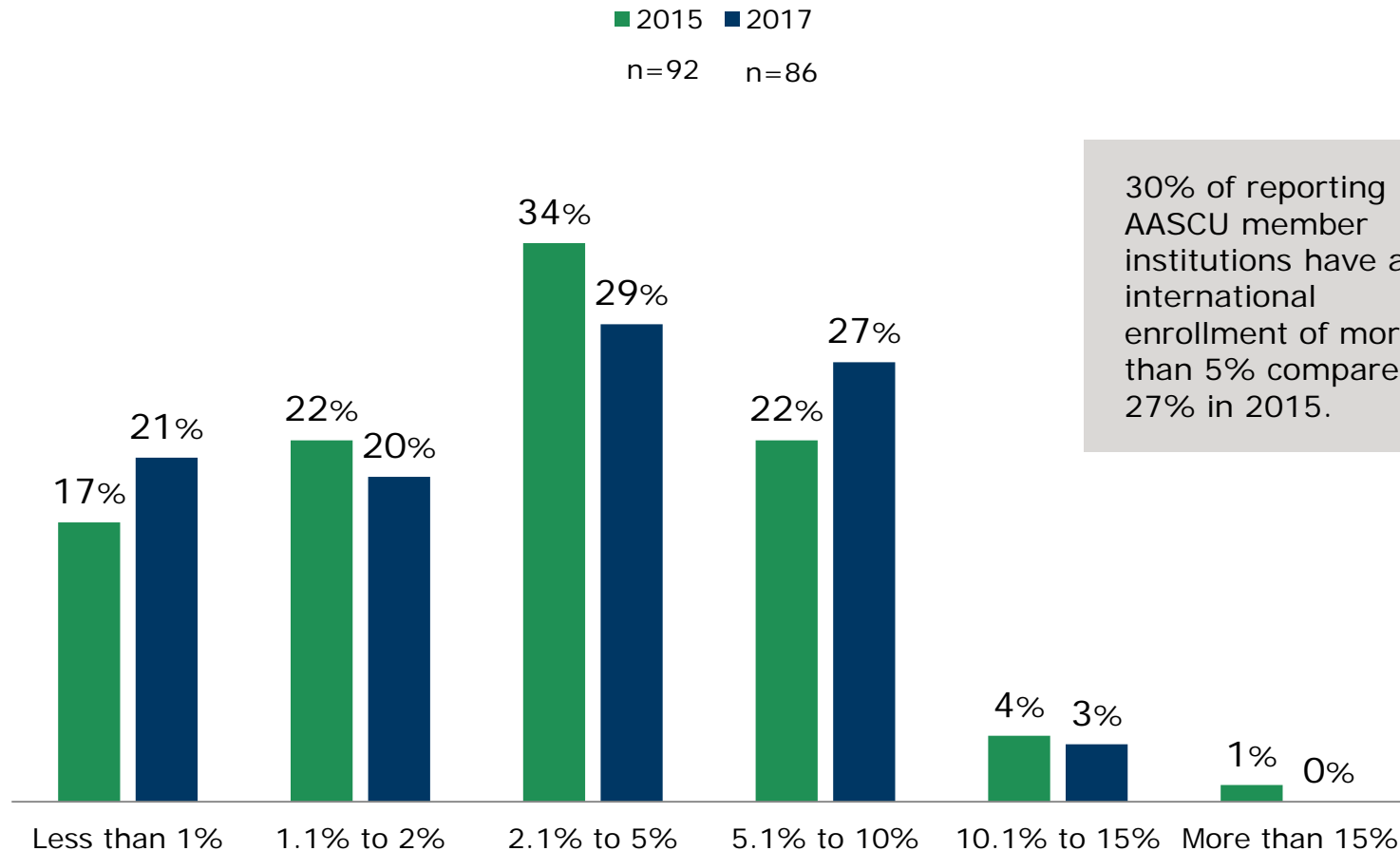
Source: IPEDS available for 385 AASCU institutions

Note: "Not applicable" are not included in the table so it may not add up to 100%

# Survey Findings

# International Enrollment Percentages Has Shifted

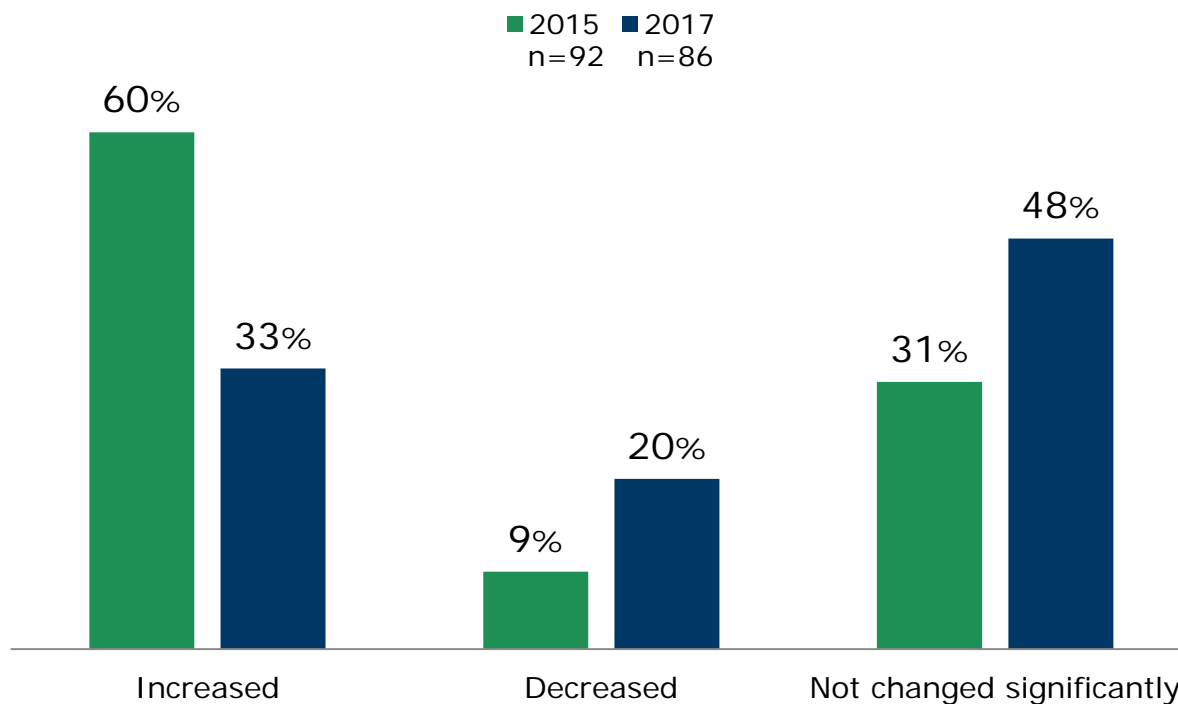
## Percentage of International Student Enrollment



30% of reporting AASCU member institutions have an international enrollment of more than 5% compared to 27% in 2015.

# Two Thirds of Respondents No Longer Seeing Increased Enrollment

## Change in International Student Enrollment

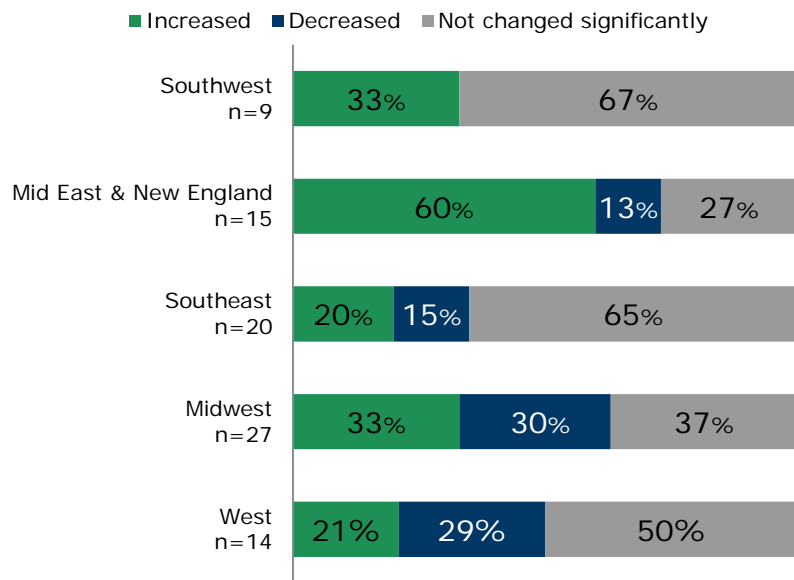


Although more institutions indicated they have an SIEM plan in place, enrollment of international students has not changed for almost half of responding institutions.

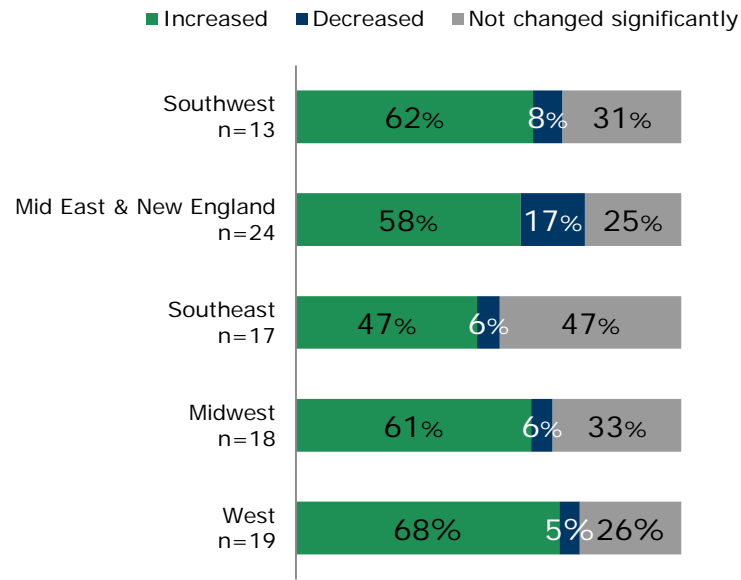


# Slower Enrollment Growth Reported Across Most Regions

Fall to Fall International Enrollment Status  
2017



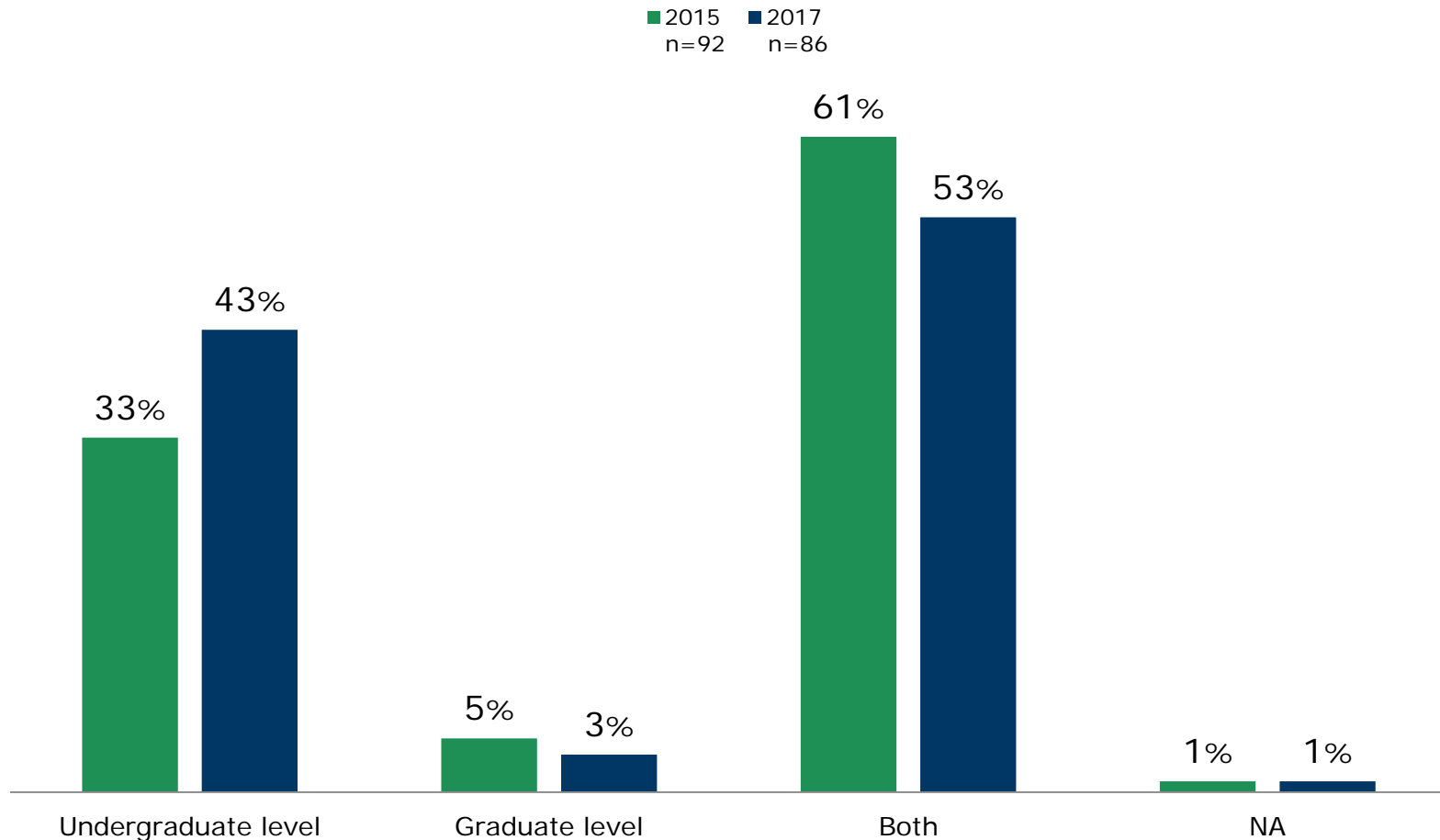
Fall to Fall International Enrollment Status  
2015



- In general, the percentage of institutions reporting an increase in international enrollment has declined from all regions except for Mid East & New England, and in contrast to 2015, **more institutions reported no significant change in enrollment** across all regions.
- Percentage of institutions **reporting a drop in international enrollment** increased significantly from Southeast, Midwest and West regions compared to 2015.
- **Mid East & New England** is the only region where the majority of institutions (60%) saw an increase in international enrollment in 2017.

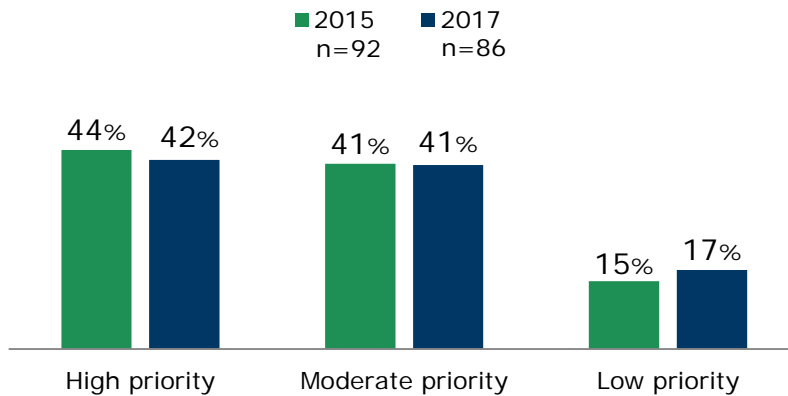
# More Emphasis on Recruiting at Undergraduate Level Only in 2017

Institution's primary focus of recruitment

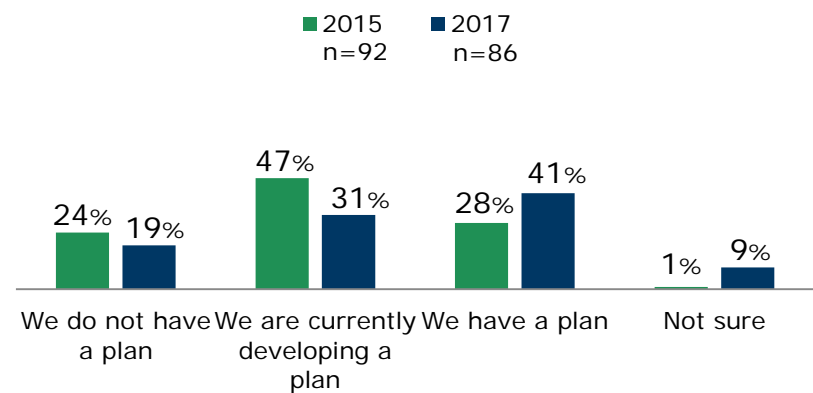


# Institutions' SIEM Priority & Planning Stage

## SIEM Priority Level



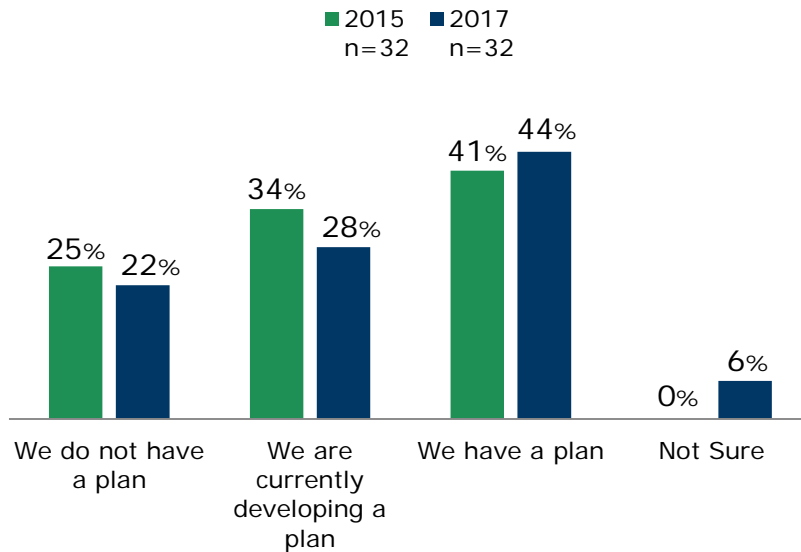
## Status of SIEM Plan



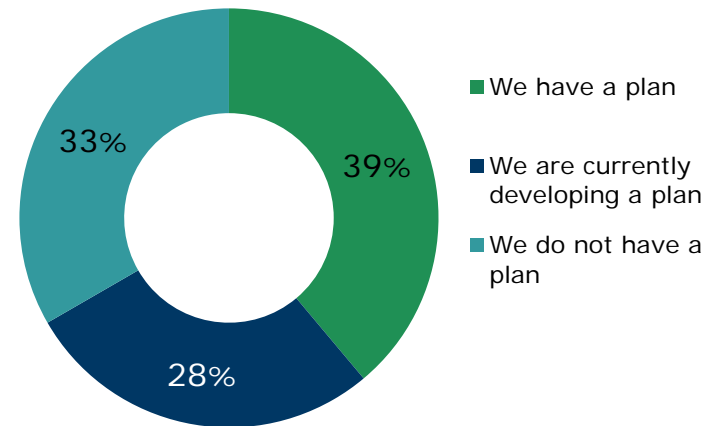
- The priority level of SIEM has **remained the same** for AASCU institutions.
- In 2017, more institutions reported they **already have an SIEM plan**, in contrast to a significant number of institutions reporting they were currently developing a plan in the 2015 survey.

# Change of Status of Institution's Strategic International Enrollment Management (SIEM) Plan Over 2 Years

**Change of Status of Institution's SIEM Plan from 2015 to 2017**



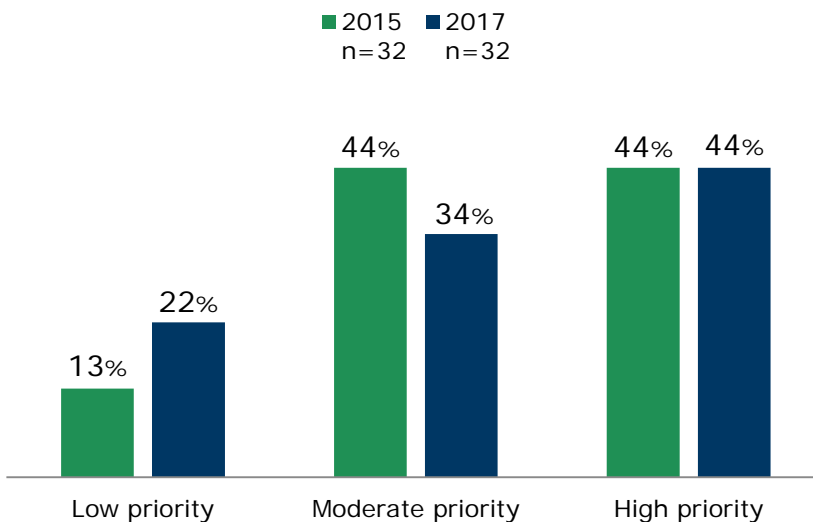
**2017 SIEM Status of Institutions that did not have or were Currently Developing a Plan in 2015 (n=19)**



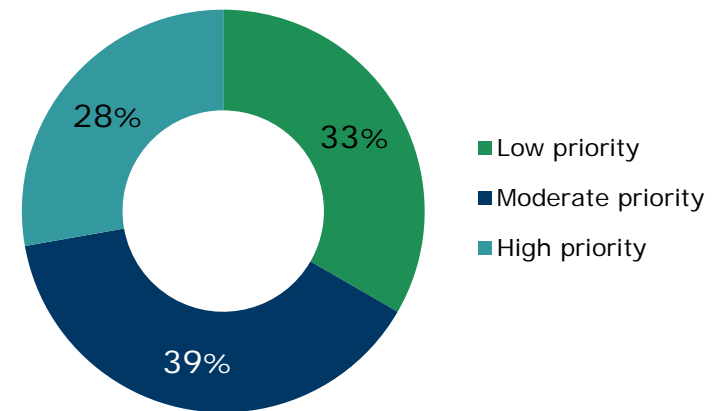
Note: Results were based on the overlap of participating institutions (n=32) in 2015 and 2017 survey.

# Decreasing Prioritization of SIEM Over 2 Years

## Prioritization for SIEM Overall



## 2017 SIEM Priority of Institutions that had Low or Moderate SIEM Priority in 2015 (n=18)

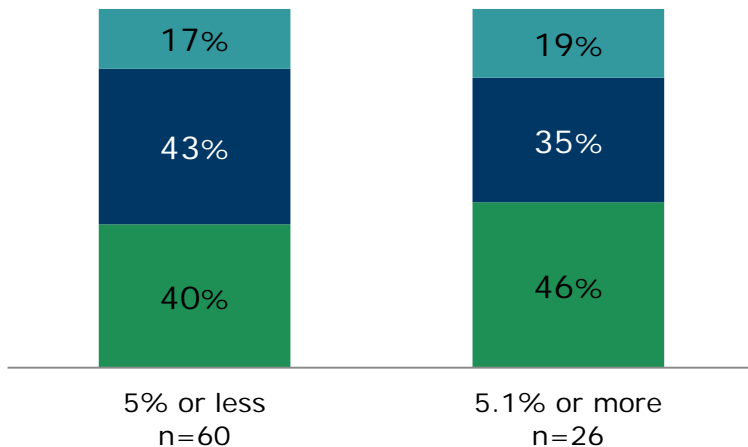


Note: Results were based on the overlap of participating institutions (n=32) in 2015 and 2017 survey.

# Institution's SIEM Priority over the Next Three Years by Percentage of Total International Students

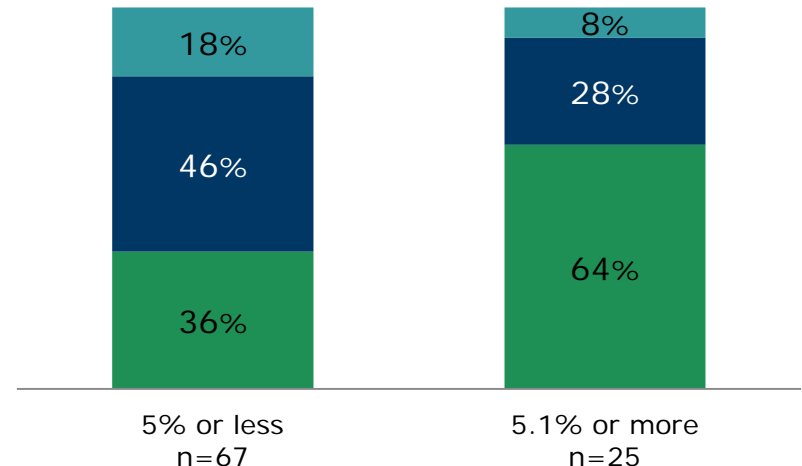
SIEM Priority over the Next 3 Years - 2017

■ High priority ■ Moderate priority ■ Low priority



SIEM Priority over the Next 3 Years - 2015

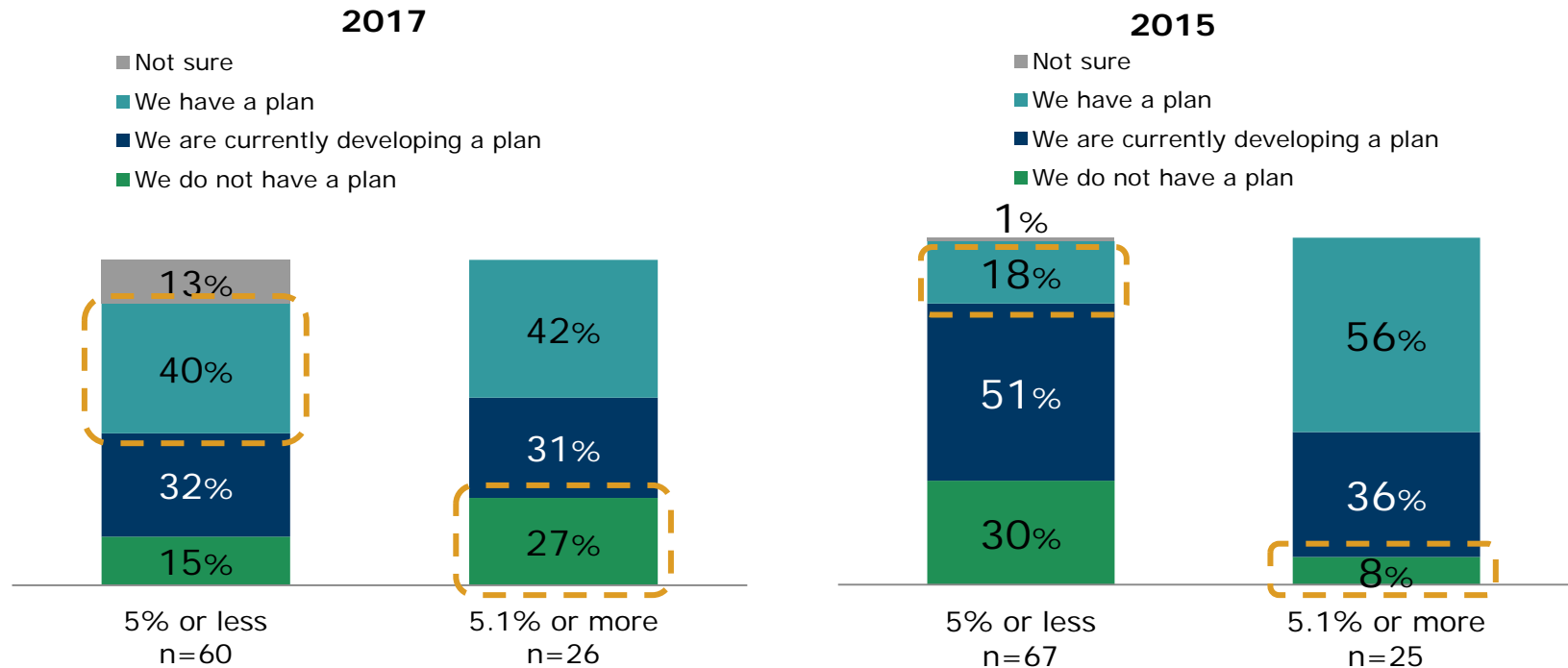
■ High priority ■ Moderate priority ■ Low priority



Compared to 2015, fewer institutions with large enrollment size (5.1% or more) indicated that SIEM is a high priority in 2017 (**64% vs. 46%**).

# SIEM Planning Stage by Population

## SIEM Planning Stage by Percentage of International Students

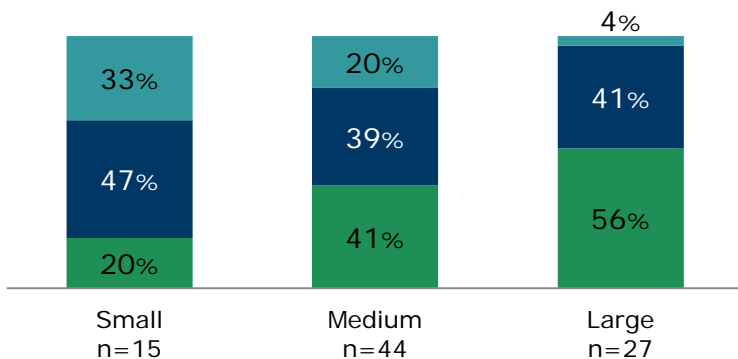


- Institutions with a total international student enrollment of more than 5% are more likely **not to have an SIEM plan** compared to 2015.
- 40% of institutions with 5% or less international students already have a plan, which represents **more than a 50% increase** compared to 2015.

# SIEM More Likely a High Priority and SIEM Planning More Likely in Larger Institutions

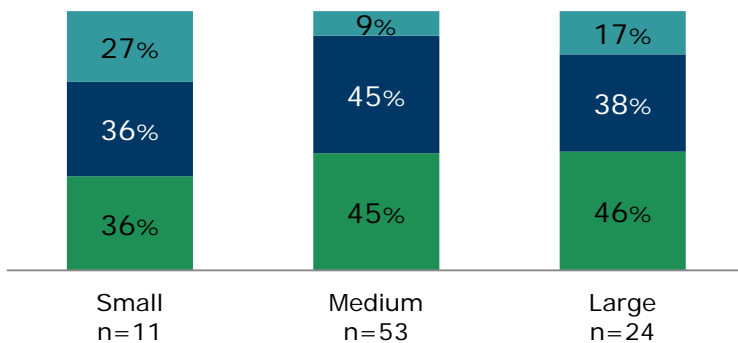
## Priority of SIEM over Next 3 Years by Institutional Size 2017

■ High priority ■ Moderate priority ■ Low priority



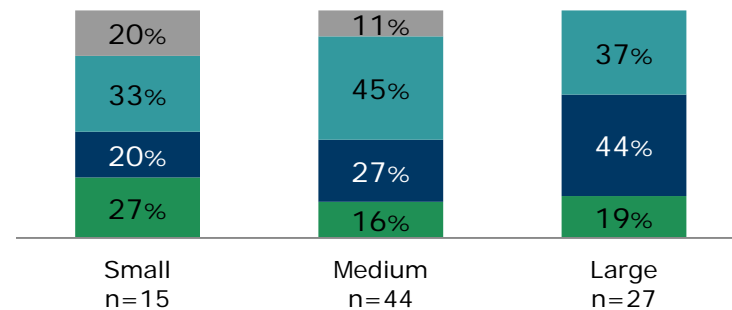
2015

■ High priority ■ Moderate priority ■ Low priority



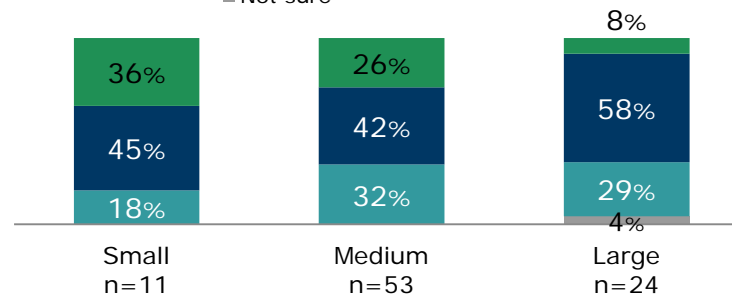
## Current Status of SIEM Plan by Institution Size - 2017

■ Not sure  
 ■ We have a plan  
 ■ We are currently developing a plan  
 ■ We do not have a plan



2015

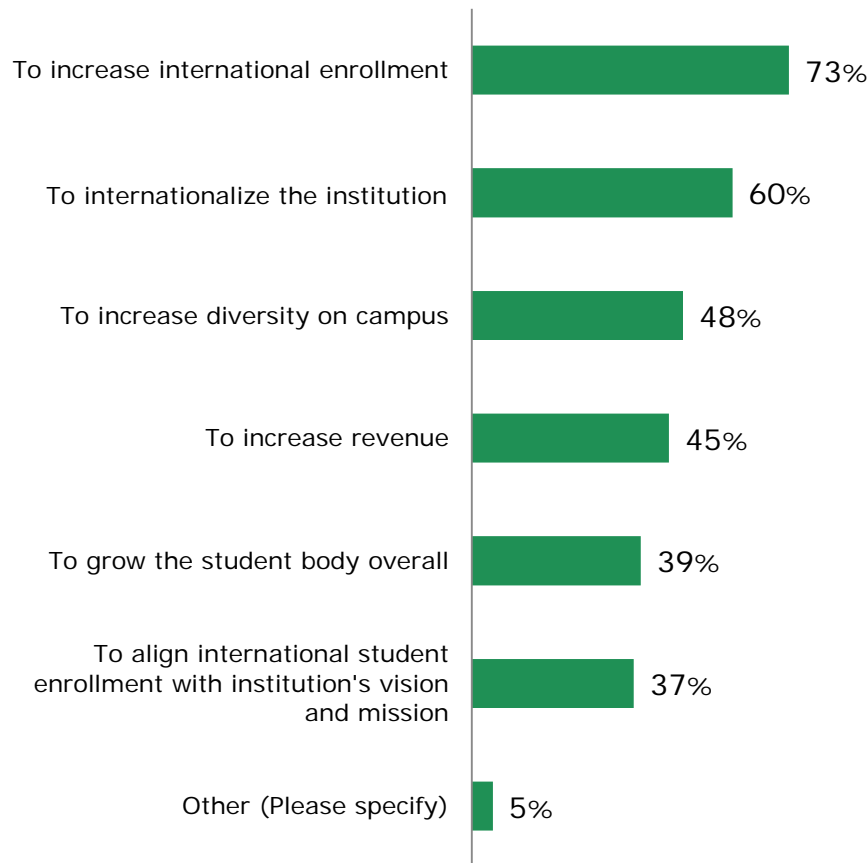
■ We do not have a plan  
 ■ We are currently developing a plan  
 ■ We have a plan  
 ■ Not sure





# Primary Reasons for Developing SIEM Plan

Reasons for Developing an SIEM Plan  
2017 (n=62)



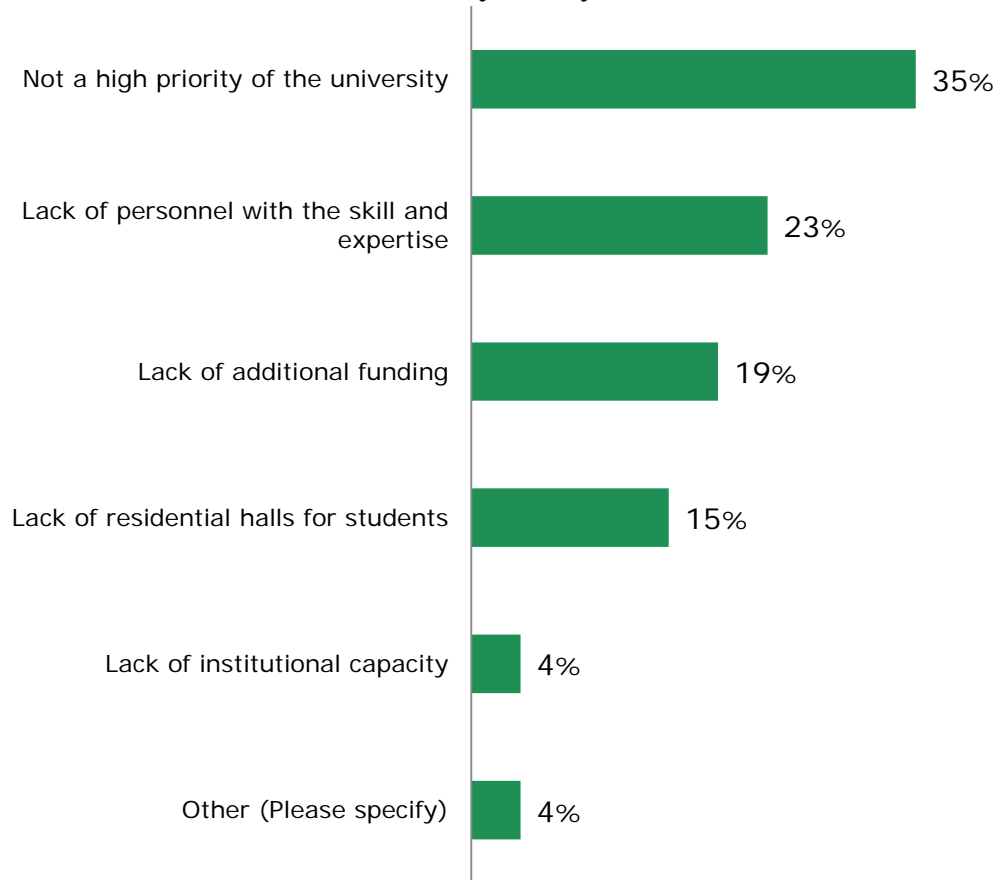
Reasons for developing  
an SIEM plan in 2015 (n=60)\*

1. **Diversifying the international student population** or diversifying the **overall** student population was reported as a primary reason for developing an SIEM plan
2. **Student population growth**
3. **Revenue**

\*Open ended question in 2015

# Primary Reasons for Not Developing SIEM Plan

**Reasons for Not Developing an SIEM Plan  
2017 (n=16)**

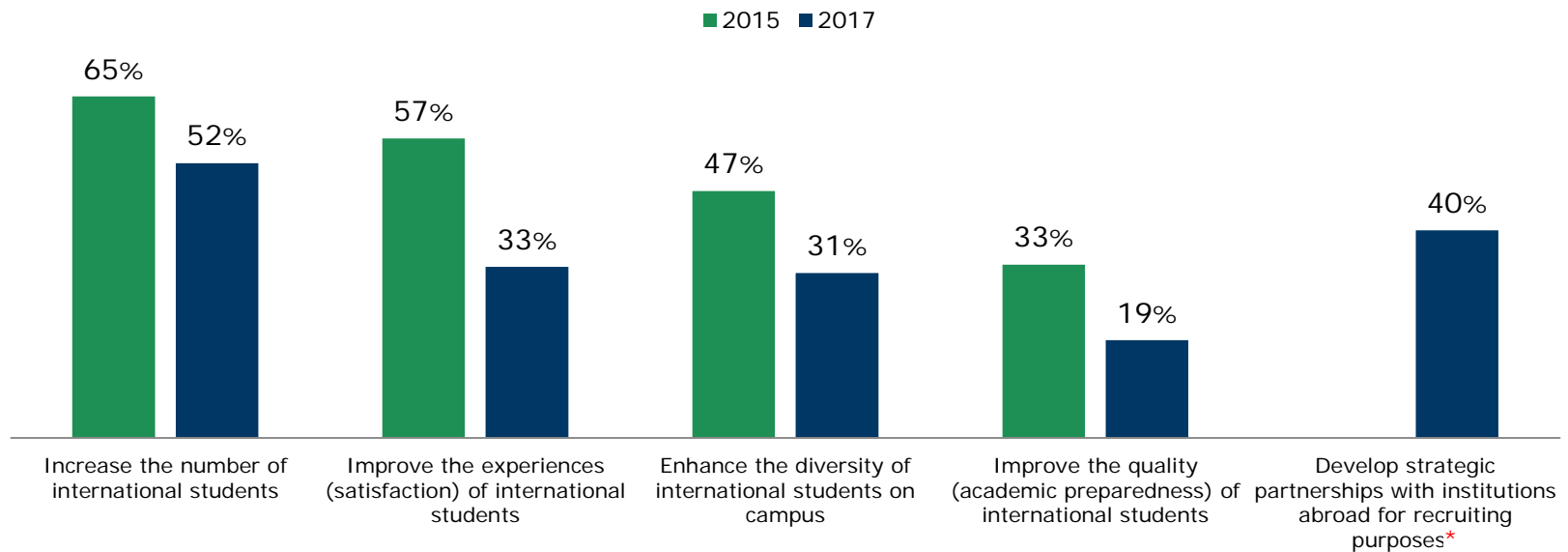


**Reasons for not developing an SIEM plan in 2015 (n=19)\***

Factors such as lack of institutional capacity and residential halls are not major obstacles for institutions to develop an SIEM plan, rather their willingness to prioritize and invest in personnel was cited by respondents.

# Increasing Number of International Students Remains Top Priority, Followed by Developing Strategic Partnerships

## High Strategic Priorities in IEM Over the Next 3 Years

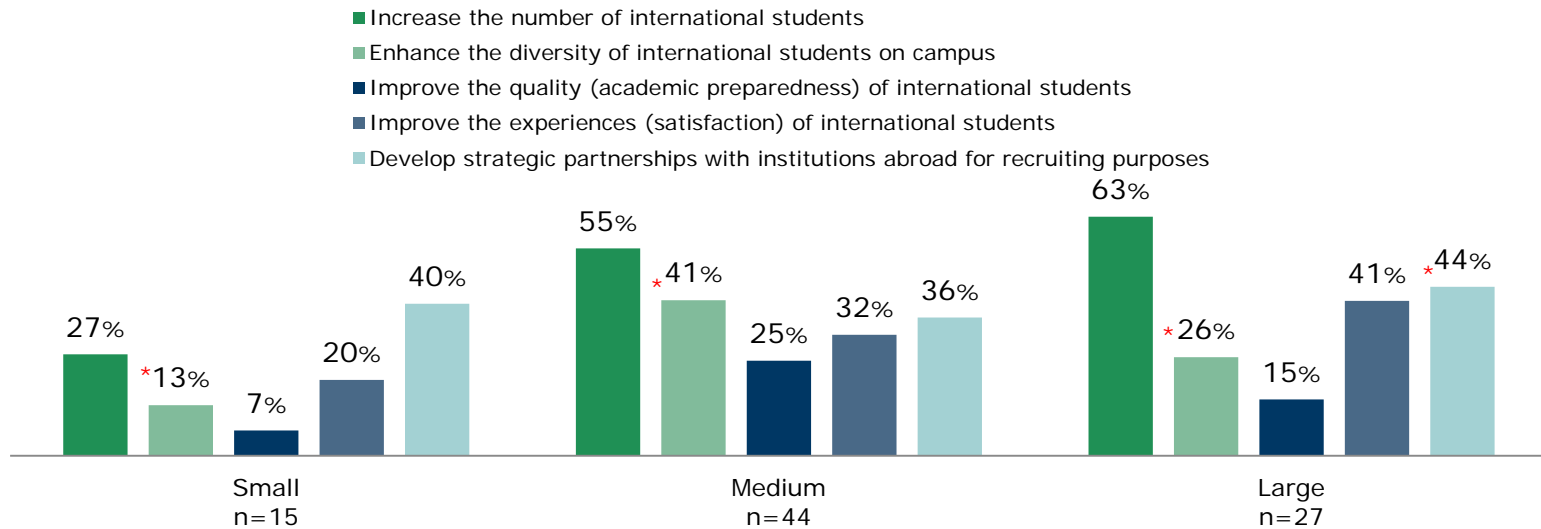


Overall the percentage of selecting high priority at each option dropped from 2015, **especially for improving student experience (-24%)**, indicating the sense of urgency at the international enrollment sector has declined.

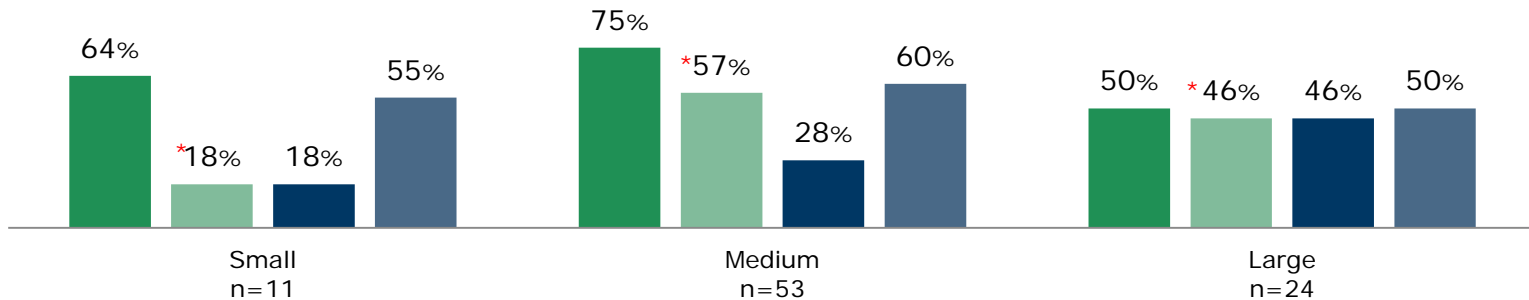
\*Note: "Develop strategic partnerships with institutions abroad for recruiting purposes" was a frequent mentioned factor of another open-ended question in the 2015 survey thus was added as a choice in the 2017 survey.

# Large Institutions Show the Most Interest in Developing Strategic Partnerships with Institutions Abroad

## Top Strategic Priorities in IEM by Institutional Size - 2017



## 2015

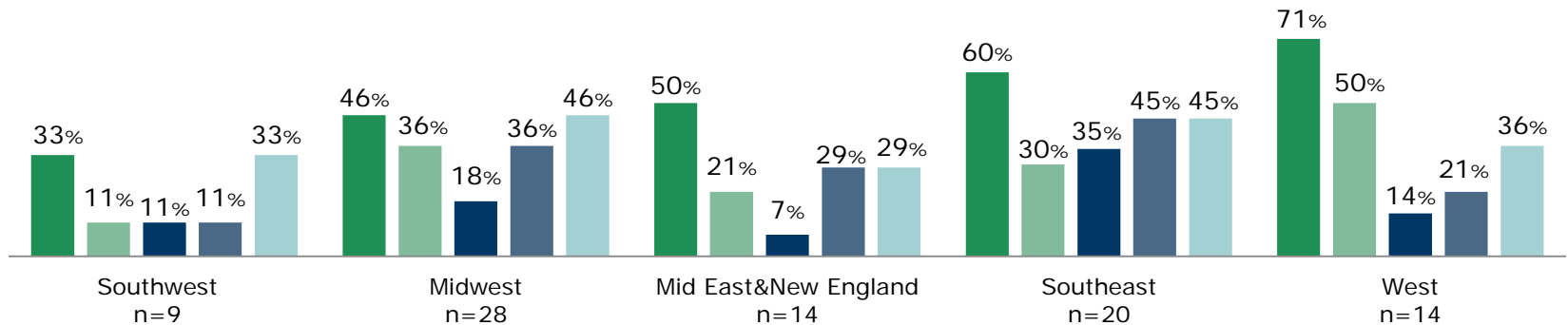


\* Institutions show less interest in diversifying international students in 2017 compared to 2015.

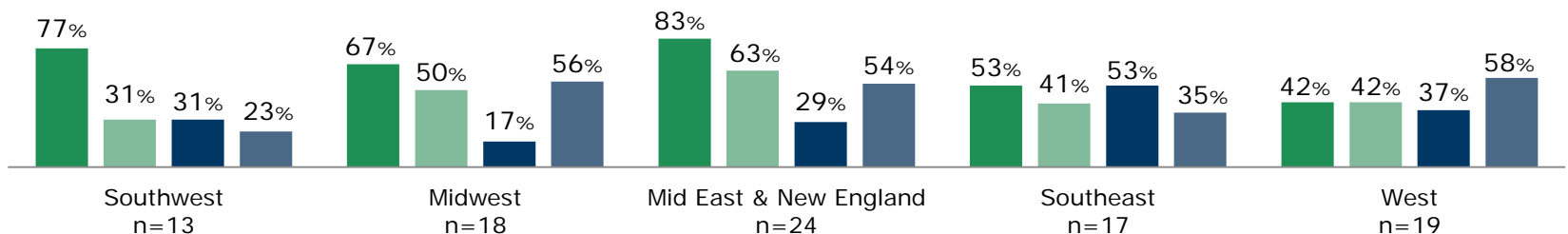
# Enrollment Challenges Affecting Top SIEM Priorities in West and Southeast

**High Strategic Priorities for SIEM over the Next 3 Years  
(n=86) 2017**

- Increase the number of international students
- Enhance the diversity of international students on campus
- Improve the quality (academic preparedness) of international students
- Improve the experiences (satisfaction) of international students
- Develop strategic partnerships with institutions abroad for recruiting purposes



**2015**



# Other Strategic Internationalization Priorities

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2017

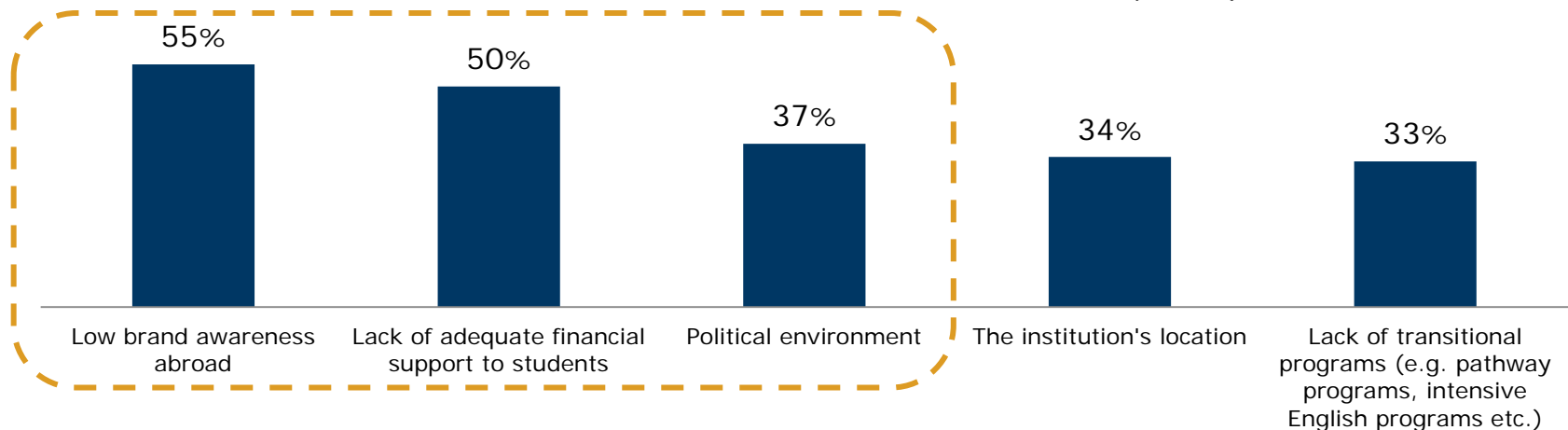
- Enhancing **partnerships**: collaboration with higher education counterparts, pathway programs and **community colleges**, especially in recruitment.
- Engaging more American students to **study abroad**.

2015

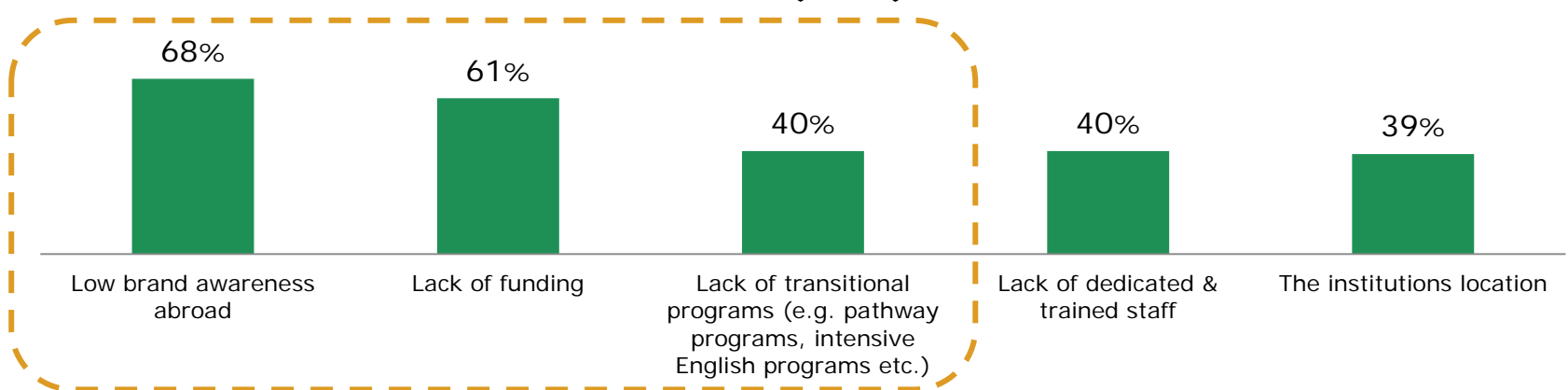
- Developing **partnerships** and relationships with institutions and others abroad to aid recruitment.
- Recruit through domestic channels, including **U.S. high schools** and **community colleges**.
- Expand **study abroad**, including for international students.

# Low Brand Awareness and Lack of Funding Remain Top Two Challenges, Followed by Political Environment

**Top 3 Challenges Confronting Your Institution in Terms of Meeting its International Student Enrollment Goals - 2017 (n=86)**

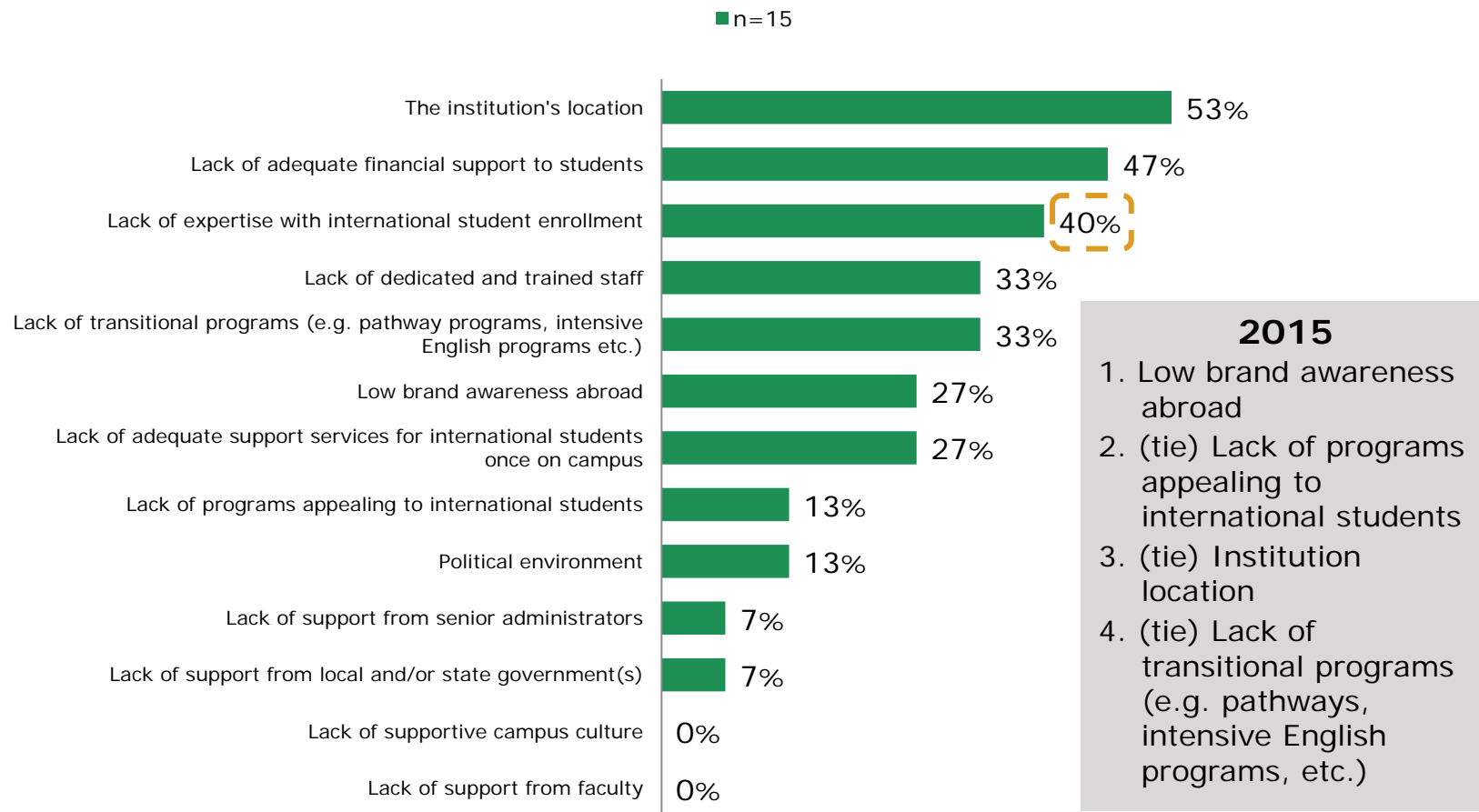


**2015 (n=92)**



# Small Institutions Struggle with Location, Lack of Expertise, Compared to Larger AASCU Peers

## Top Issues & Challenges in IEM for Small Institutions in 2017

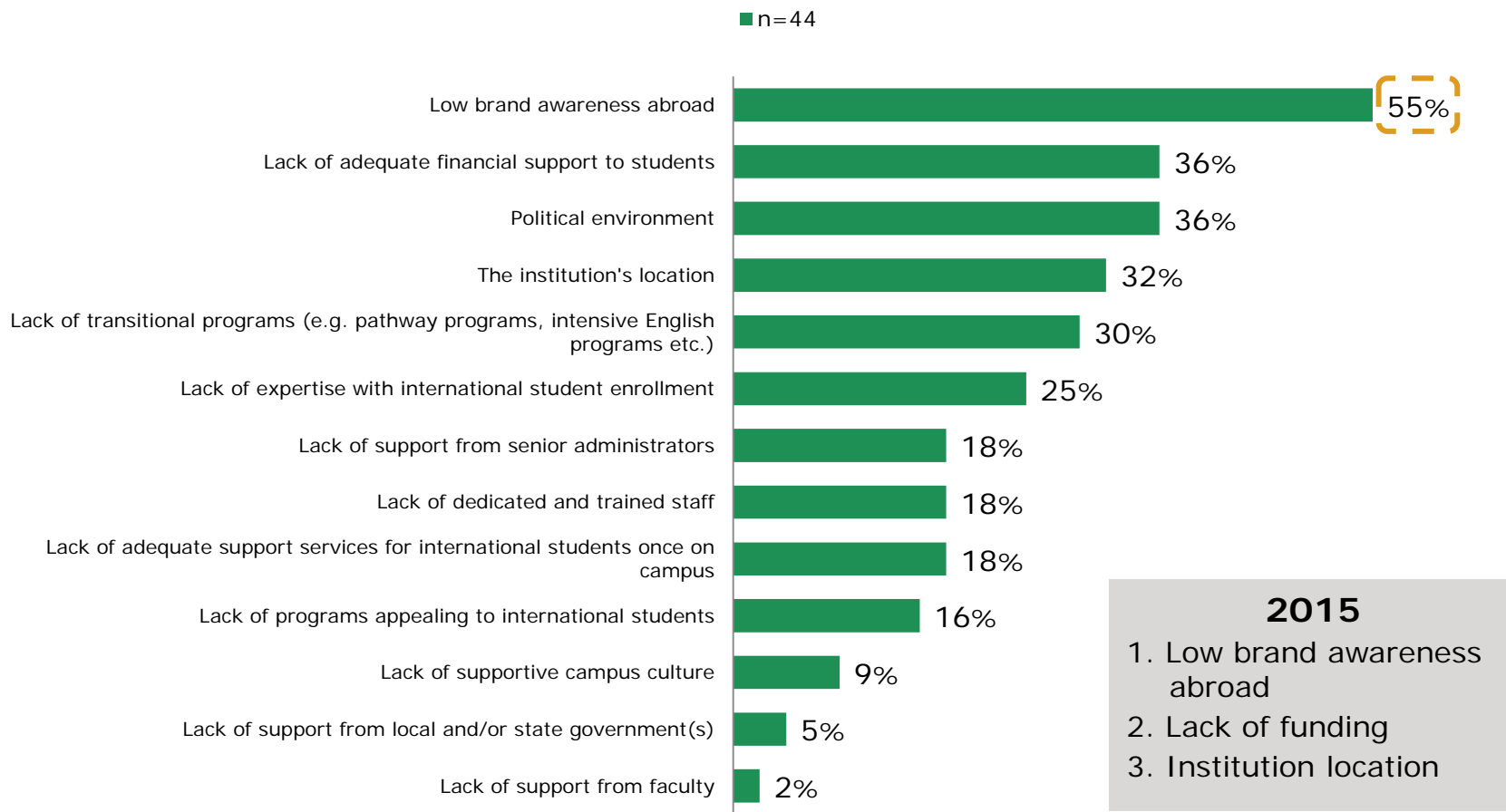


Note: Due to changes on type of the question and newly added options in 2017, no direct comparison between 2015 and 2017 can be made therefore results should be interpreted within the context.



# Brand Awareness Still Top Challenge for Medium-Sized Institutions

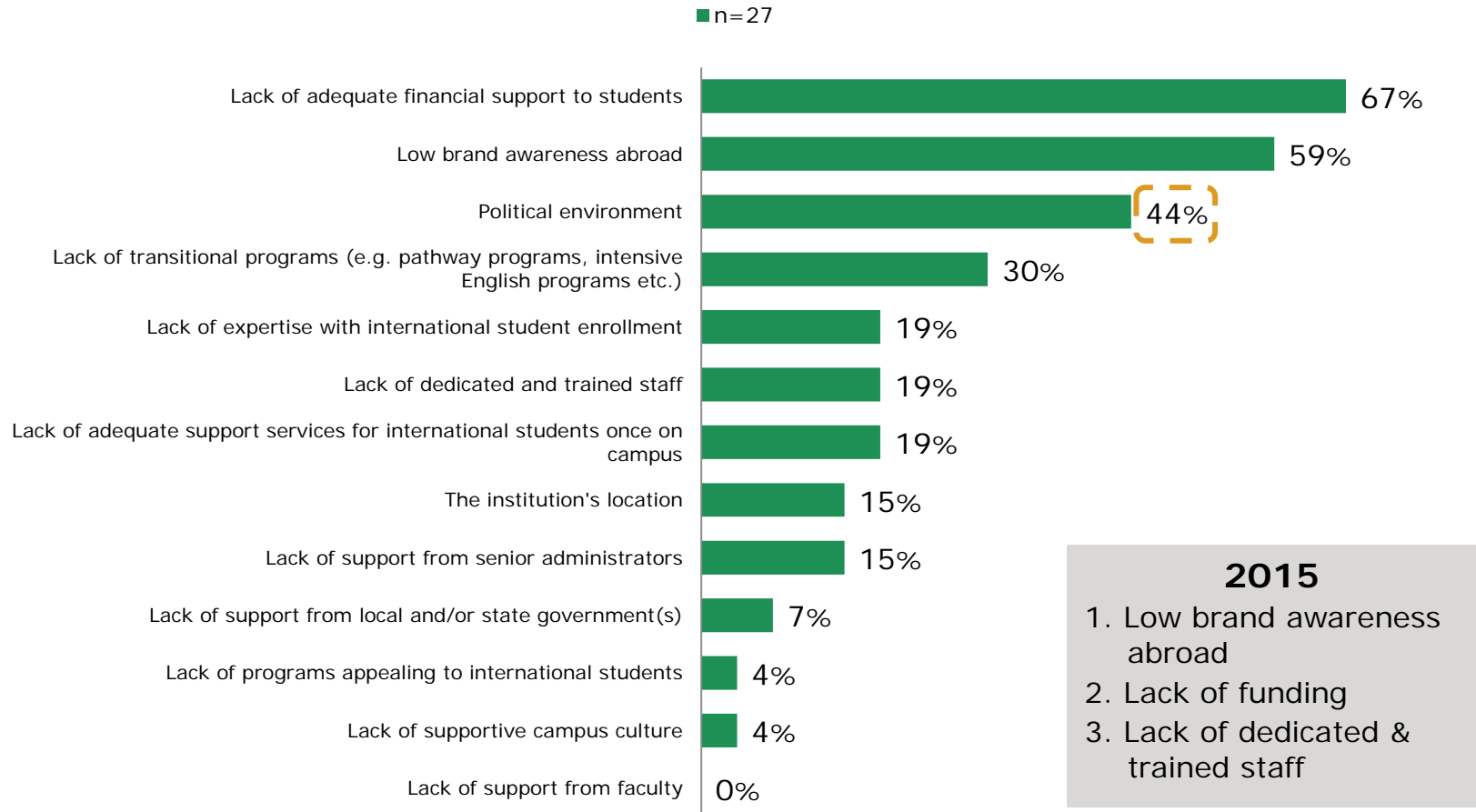
## Top Issues & Challenges in IEM for Medium Institutions in 2017



Note: Due to changes on type of the question and newly added options in 2017, no direct comparison between 2015 and 2017 can be made therefore results should be interpreted within the context.

# Political Environment Most Significant for Large Institutions

## Top Issues & Challenges in IEM for Large Institutions in 2017



Note: Due to changes on type of the question and newly added options in 2017, no direct comparison between 2015 and 2017 can be made therefore results should be interpreted within the context.

# Top 3 IEM Issues & Challenges by Geographic Region

Geographic Region	2017 Top 3 Issues & Challenges in IEM
West	Lack of adequate support services for international students once on campus
	Low brand awareness abroad
	Lack of transitional programs (e.g. pathway programs, intensive English programs etc.)
Midwest	Low brand awareness abroad
	Political environment
	The institution's location
Mideast & New England	Low brand awareness abroad
	Lack of transitional programs (e.g. pathway programs, intensive English programs etc.)
	Lack of programs appealing to international students / Lack of adequate financial support to students*
Southeast	Lack of adequate financial support to students
	Low brand awareness abroad
	Political environment
Southwest	Lack of adequate financial support to students
	Lack of expertise with international student enrollment / The institution's location / Lack of transitional programs (e.g. pathway programs, intensive English programs etc.)*

Note: \*Options with slash (/) reflects tied choices

# Top 3 Issues & Challenges by Status of IEM Planning

SIEM Plan	2017 Top 3 Issues & Challenges in IEM
We do not have a plan	Lack of adequate financial support to students
	Lack of transitional programs (e.g. pathway programs, intensive English programs etc.)
	Lack of expertise with international student enrollment / Lack of support from senior administrators*
We are currently developing a plan	Low brand awareness abroad
	Lack of adequate financial support to students
	Lack of expertise with international student enrollment
We have a plan	Low brand awareness abroad
	Lack of adequate financial support to students
	Political environment

Note: \*Options with slash (/) reflects tied choices

# Conclusion

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Develop/enhance institution-wide SIEM plan to:

- Increase **international enrollment**
- **Internationalize** the institution
- Increase **diversity** on campus

Next Steps:

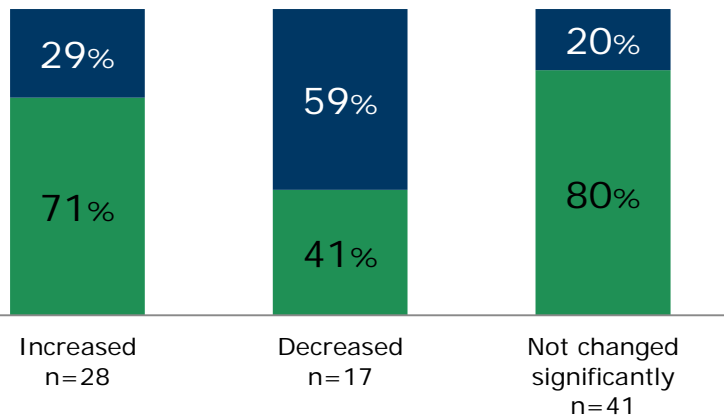
- Engage campus leaders in advocacy efforts
- Strategically minimize budgetary constraints
- Address branding challenges collaboratively
- Embrace comprehensive internationalization

# Appendix

# Institutions with Enrollment of 5.1% or More Saw a Decline in International Student Enrollment from Fall 2013/14 to Fall 2015/16

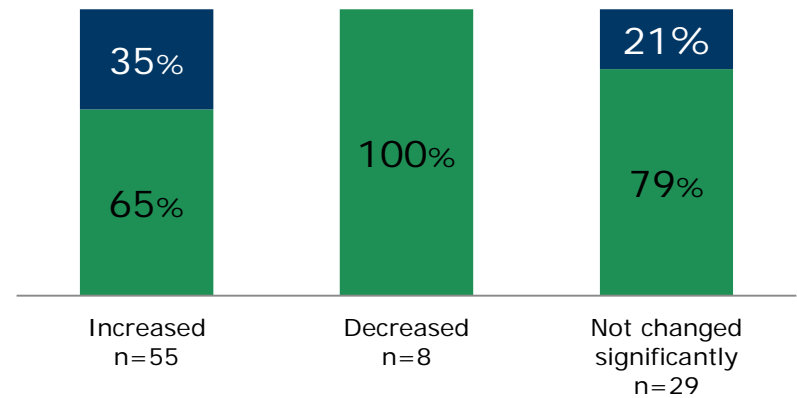
**Percentage of International Students 2017**

■ 5% or less ■ 5.1% or more



**Percentage of International Students 2015**

■ 5% or less ■ 5.1% or more

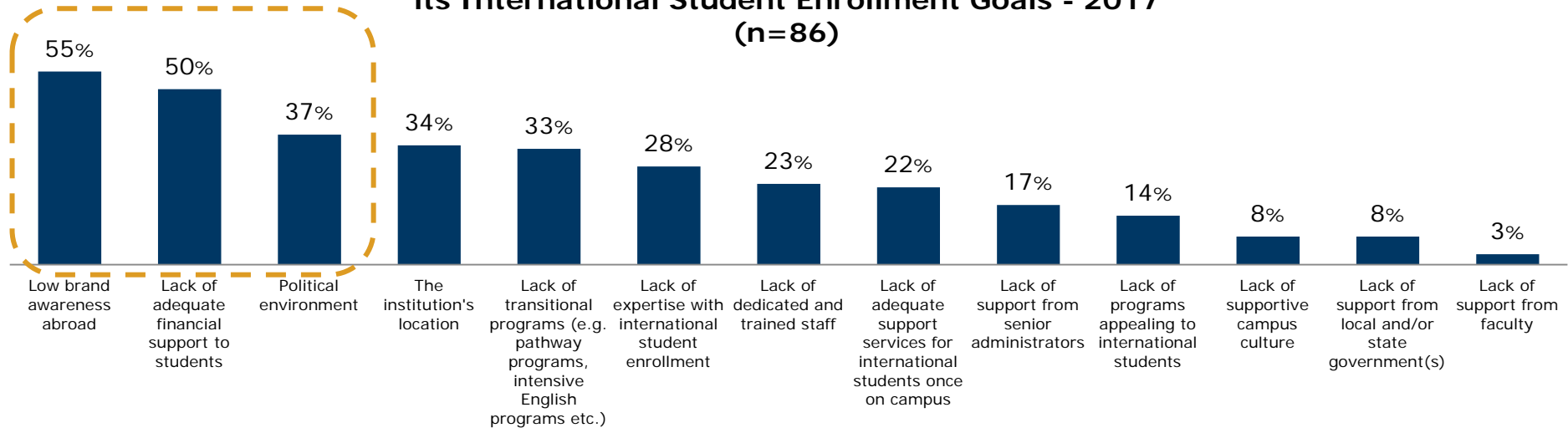


- In general, the percentage of institutions reporting an increase in enrollment has declined whereas more institutions saw no significant change in enrollment in 2017 compared to 2015.
- Nearly 6 in 10 institutions with international student enrollment of 5.1% or more reported a decrease in enrollment from Fall 2015 to Fall 2016, whereas no institutions with that percentage of international students saw decreases in enrollment from Fall 2013 to Fall 2014 in 2015.
- 6% fewer institutions with international student enrollment size of 5.1% or more reported an increase in enrollment in 2017, compared to 2015.

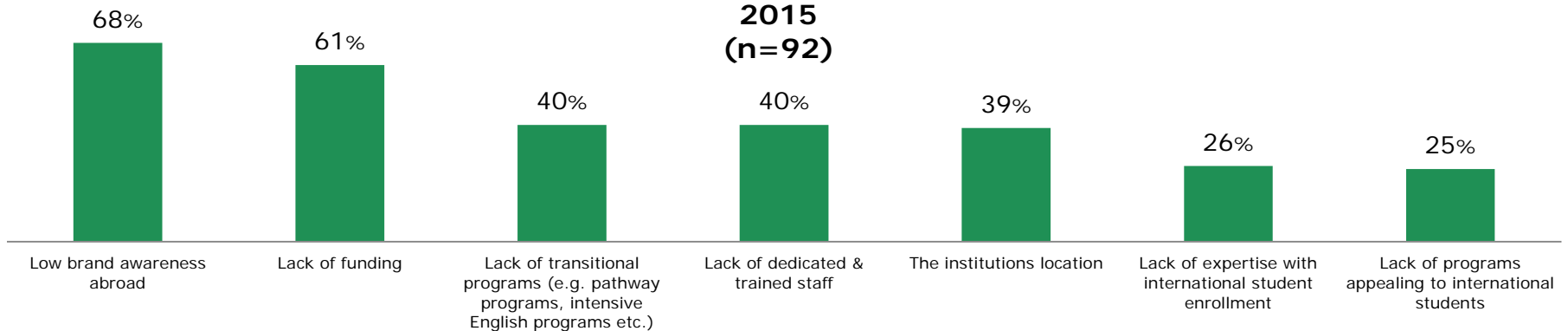
# Top 3 Challenges Confronting Institutions in Terms of Meeting International Student Enrollment Goals

Please Select the Top 3 Challenges Confronting Your Institution in Terms of Meeting its International Student Enrollment Goals - 2017

(n=86)



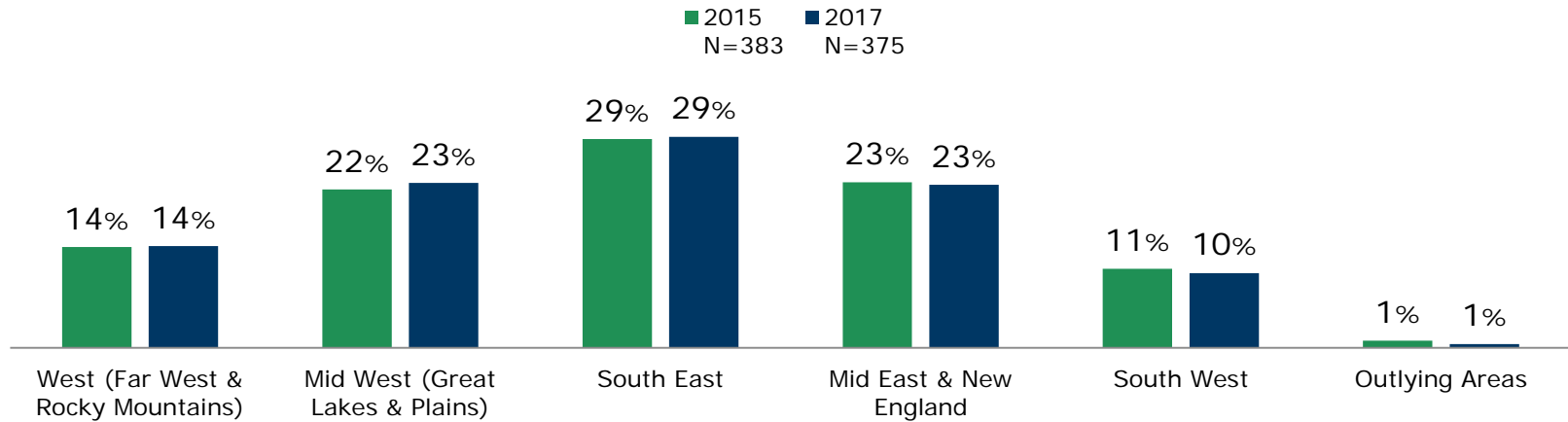
2015  
(n=92)



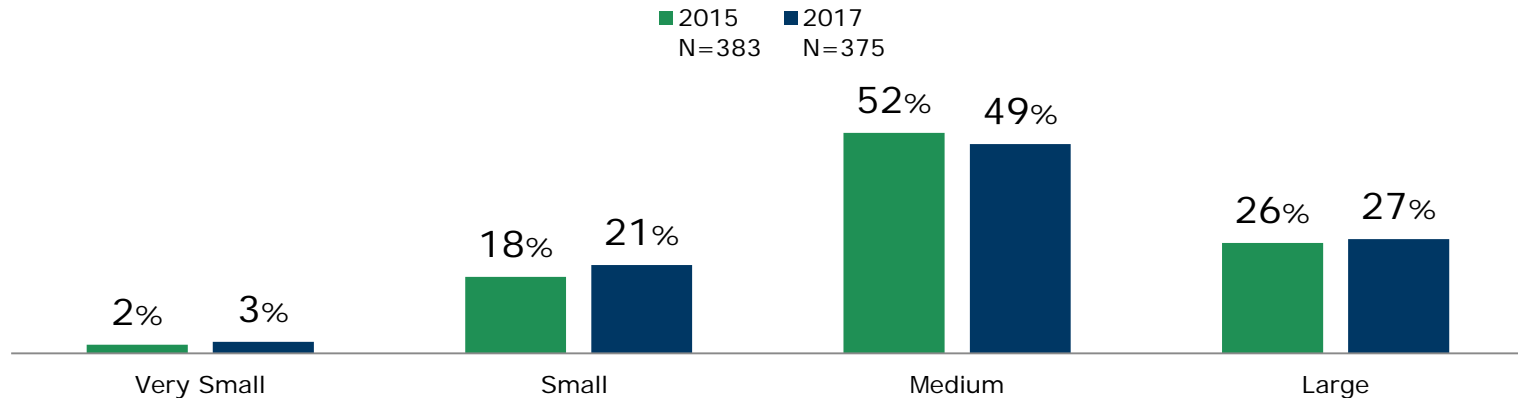


# AASCU Institutions Overall Profile

## Geographic Region

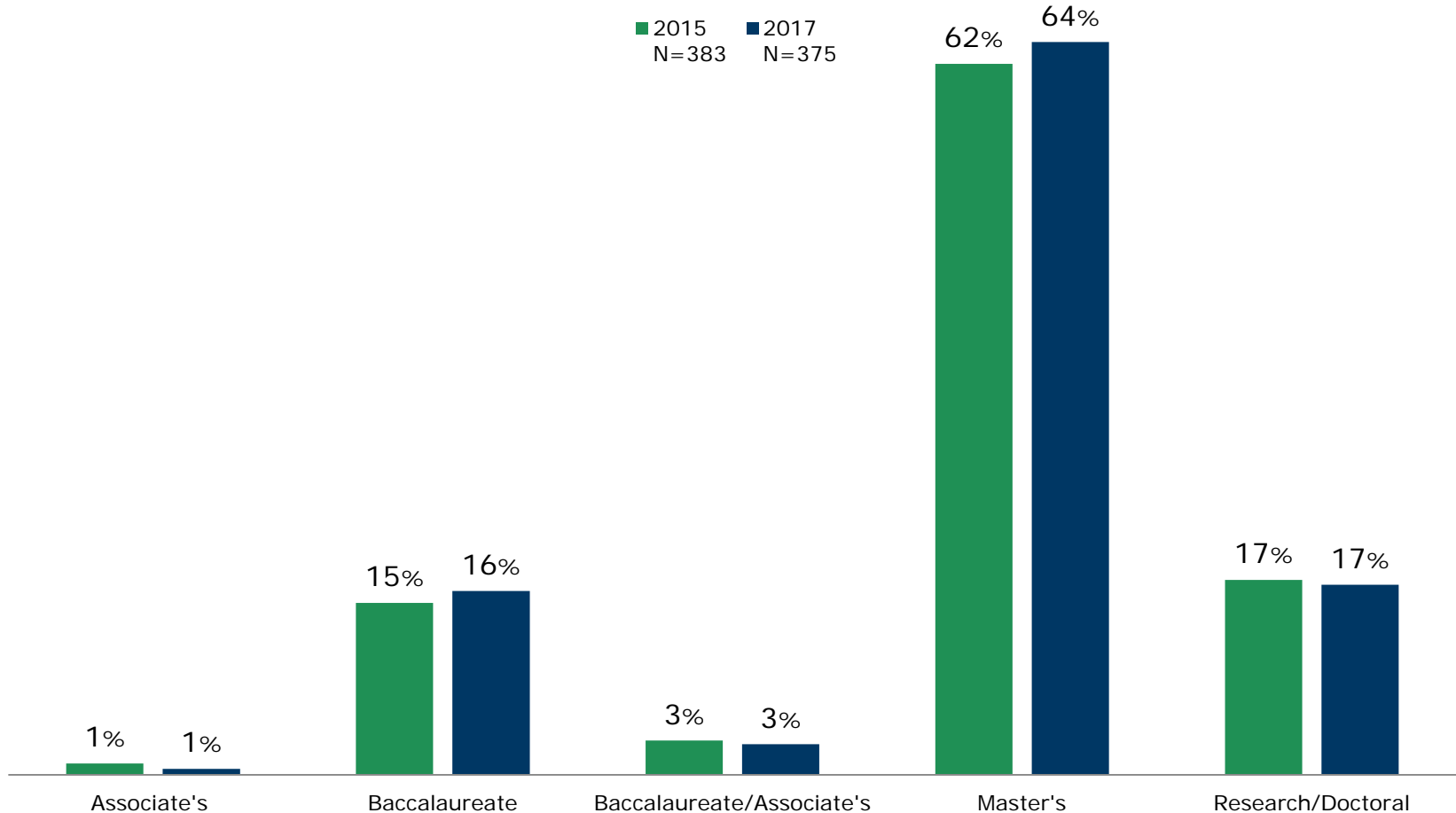


## Size & Setting

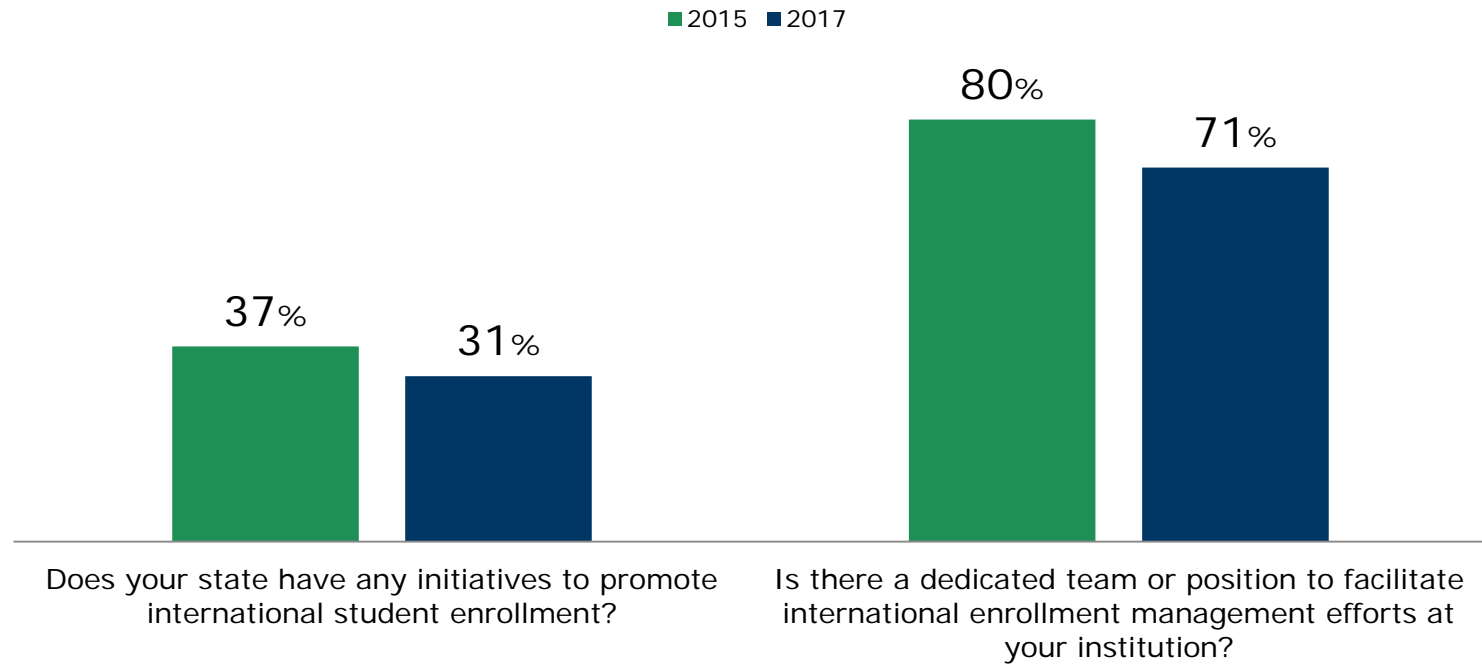


# AASCU Institutions Overall Profile (Cont.)

## Carnegie Classification



# Institutional Characteristics for IEM



- International enrollment initiative at the state level has weakened compared to 2015.
- International enrollment management at the institution level has been less supported than it did in 2015.

Note: % refers to respondents who answered “Yes”

2015 (n=92)

2017 (n=86)



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