International Student Landscape in the U.S.

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Presented at the NSLC, New Orleans, January 18, 2019
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• International Student Mobility
• Decline in New Enrollment
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Secretary of State Mike Pompeo on International Education … We are consistently the number 1 destination for foreign students… we call on all American universities, businesses, civic groups and NGOs to promote international education and spread the word about the world class education that American campuses have to offer… https://www.youtube.com/watch?v=Q4YwN_oRow8
1,094,792 was the Number of International Students in the US in 2017/2018 -- Open Doors Report (IIE & BECA/Dept. of State)
International Student Mobility

1,094,792 international students added $39 billion to the U.S. economy & supported 455,622 U.S. jobs in 2017/18 (155,381 Direct Jobs + 300,241 indirect jobs). While universities have the highest benefit (56%), housing, dining, retail, telecom, transportation, and health insurance also benefit.
International Student Mobility

Uptrend in TOTAL international student enrollment over the past six decades. In 2017/18 = 5.5% of total U.S. enrollment.

In 2017/18 there was an increase of **1.5%** over the prior year in the number of international students enrolled in academic programs.
Over the past decade, not only has international student enrollment increased in the U.S. but also the economic benefit and the jobs supported.

International Student Mobility

51% of international students come from China and India.

LSU Faculty with Sichuan Ag University students and faculty, Chengdu, China.
California, New York, and Texas are the 3 top states hosting international students (1 out of 3 int’l students studies in these 3 states).
International Student Mobility

Total international student numbers and U.S. total world exports are highly correlated = 95%.

International Student Mobility

Total international student numbers and U.S. total exports of goods to China are highly correlated = 93%.

Source: IIE Open Doors Data & United States Census Bureau, Foreign Trade. Downloaded January 16, 2019. 2018 data for China is through October, 2018; once Nov and Dec are added, the decline will not be as shown.
International Student Mobility

Selected states in the South show a positive correlation between total exports and international student numbers.

Sources: https://www.iie.org/Research-and-Insights/Open-Doors/Data/Economic-Impact-of-International-Students; US Census Bureau/Foreign Trade of the US.
International Student Mobility

Impact on Louisiana:
Fall 2017, 7,750 students, the EB was $259 mi. with 3,062 jobs supported.

International Student Mobility

…but new student enrollment is declining…. -6.6% last year…
International Student Mobility

New or first time enrollment has declined in all categories with non-degree students leading, followed by undergraduate and graduate students.
International Student Mobility

While total enrollment from China and India continues to be +, Saudi Arabia, Mexico, South Korea and Canada show large declines. There are new players also.
In 2017/18, most international students enrolled at Doctoral-granting Universities.
Fields of Study: The 3 dominant fields are engineering, business & management, and math and computer sciences.
International Student Mobility

The top 25 U.S. universities hosting international students account for about 23% of all international students; the top 15 shown in chart account for 16.25%.

<table>
<thead>
<tr>
<th>University</th>
<th>Number of International Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carnegie Mellon University</td>
<td>8,604</td>
</tr>
<tr>
<td>Pennsylvania State University -...</td>
<td>8,636</td>
</tr>
<tr>
<td>University of Washington</td>
<td>8,902</td>
</tr>
<tr>
<td>University of California - Berkeley</td>
<td>9,331</td>
</tr>
<tr>
<td>University of Texas - Dallas</td>
<td>9,713</td>
</tr>
<tr>
<td>Boston University</td>
<td>9,742</td>
</tr>
<tr>
<td>University of California - San Diego</td>
<td>9,883</td>
</tr>
<tr>
<td>Purdue University - West Lafayette</td>
<td>11,044</td>
</tr>
<tr>
<td>University of California - Los Angeles</td>
<td>12,017</td>
</tr>
<tr>
<td>University of Illinois - Urbana,...</td>
<td>13,445</td>
</tr>
<tr>
<td>Arizona State University - Tempe</td>
<td>13,459</td>
</tr>
<tr>
<td>Columbia University</td>
<td>14,615</td>
</tr>
<tr>
<td>Northeastern University - Boston</td>
<td>14,905</td>
</tr>
<tr>
<td>University of Southern California</td>
<td>16,075</td>
</tr>
<tr>
<td>New York University</td>
<td>17,552</td>
</tr>
</tbody>
</table>
International Student Mobility

Contribution by international students to the U.S. economy in 2017: $42.4 Billion*

64.5% Non-U.S. Funding
- 58.6% Personal and Family
- 5.2% Foreign Gov’t or University
- 0.6% Foreign Private Sponsor
- 0.1% International Organizations
- 18.8% Current Employment
- 15.8% U.S. College or University
- 0.9% Other Source

*Source: U.S. Department of Commerce

#IIEW2018 #IIECelebratesIIEW2018 #OpenDoorsReport
WHAT IS HAPPENING WITH NEW ENROLLMENT?
International Student Mobility

Except for the OPT cohort, all academic levels has stagnated. Largest decline is in non-degree seeking students.
After graduating, most international students return to the country of origin but the percent pursuing Optional Practical Training in the U.S. has been increasing since 1979. For some countries like Nepal, gaining practical experience is a driver for coming to the U.S. and landing jobs back in Nepal.
International Student Mobility

...new student enrollment decline is highest in the Midwest of the U.S.

Source: IIE/Open Doors, Fall 2018 Survey.
What are U.S. Institutions of Higher Education saying and doing about new enrollment decline?
International Student Mobility: IIE Survey shows

Multiple factors contribute to shifts in student enrollment

<table>
<thead>
<tr>
<th>Factors Driving Declines</th>
<th>Factors Driving Increases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visa application process or visa delays/denials</td>
<td>More active recruitment efforts</td>
</tr>
<tr>
<td>Social and political environment in the U.S.</td>
<td>Growing reputation and visibility abroad</td>
</tr>
<tr>
<td>Enroll in another country’s institutions (other than the U.S.)</td>
<td>More active outreach to admitted students</td>
</tr>
<tr>
<td>Cost of tuition/fees at U.S. host institution</td>
<td>Increased partnerships with recruitment agents</td>
</tr>
<tr>
<td>Feeling unwelcome in the U.S.</td>
<td>Growth of institutional scholarships for int’l students</td>
</tr>
<tr>
<td>Securing a job in the U.S. after their studies</td>
<td>Increased number of linkages with int’l universities</td>
</tr>
<tr>
<td>Physical safety in the U.S.</td>
<td>Foreign government sponsored scholarship programs</td>
</tr>
</tbody>
</table>

Financial Support for int’l students
Institutions in the U.S. are concerned about Fall 2019 enrollment; the degree of concern varies by region/country, according to a 2018 IIE Survey.
In addition to Visa issues and the political environment, what about other factors, such as COMPETITION for international students?
Countries with universities in the top 800, that strongly compete with the US, include the UK, Canada, Germany, Australia, Russia (24), China (52), others. Purple is LSU’s strategic Partners.
The UK, Canada, Germany and Australia are top competitors to the U.S. for international students. The Race for international students will just get stronger. Some countries that have aggressive targets for the near future:

<table>
<thead>
<tr>
<th>Country</th>
<th>Year</th>
<th>Target</th>
</tr>
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<tbody>
<tr>
<td>Australia</td>
<td>2025</td>
<td>720,000</td>
</tr>
<tr>
<td>France</td>
<td>2017</td>
<td>500,000</td>
</tr>
<tr>
<td>China</td>
<td>2020</td>
<td>500,000</td>
</tr>
<tr>
<td>Canada</td>
<td>2022</td>
<td>450,000</td>
</tr>
<tr>
<td>Germany</td>
<td>2020</td>
<td>350,000</td>
</tr>
<tr>
<td>Turkey</td>
<td>2022</td>
<td>350,000</td>
</tr>
<tr>
<td>Japan</td>
<td>2020</td>
<td>300,000</td>
</tr>
<tr>
<td>South Korea</td>
<td>2023</td>
<td>200,000</td>
</tr>
<tr>
<td>Malaysia</td>
<td>2025</td>
<td>250,000</td>
</tr>
<tr>
<td>Poland</td>
<td>2020</td>
<td>100,000</td>
</tr>
</tbody>
</table>

The most Pressing Challenges in New Student Enrollment

While the Demand for HE will continue to grow around the world and the US is still a preferred destination, the increasing cost of attending college in the US will make us less competitive.

Tuition + Fees

The economic impact of international students on the U.S. economy was $42 bi. last year; they supported about 450K jobs.

Most international students attend doctoral granting institutions.

International students are funded mainly by their families and governments but about a third are funded by U.S. funding sources.

Total enrollment was positive (1.5%) in 2017/18 but new enrollment is declining (-6.6%) last year.
The most Pressing Challenges in New Student Enrollment

Summary of Trends in International Student Mobility

- Primary fields of study are **STEM & Business Management**.
- Leading source countries are **China and India**.
- Countries leading **decline** of new enrollment are **Saudi Arabia, Mexico, South Korea and Canada**. Highest decline in Midwest.
- Most students go back to their home countries; the % pursuing **OPT** in the U.S. has increased from **1% to over 23%** over the past 4 decades.
The most Pressing Challenges in New Student Enrollment

➢ Visa Issues + Political Environment
➢ U.S. as a welcoming country for international students
➢ Competition and Educational Innovation
➢ Increasing Cost of Tuition
➢ Price Competition and Financial Incentives
➢ Exchange Rate Fluctuations and Global Economy