



International Enrollment Trends

June 2017

The
Enrollment
Management
Association



Executive Summary



Ongoing market changes continue to challenge schools. In addition, expected policy changes from the new U.S. presidential administration may impact the international student market. With these factors in mind, we conducted a survey of our members in late April/early May 2017 to gather their most recent enrollment figures, as compared to last year, and to understand their concerns and needs.

The 252 responses show trends in the overall numbers of inquiries, applications, and enrollments for the 2016-17 school year as compared to 2015-16. More schools show increases than decreases in all of these markers. However, it is notable that 20% – a fifth – of all schools reported a slight decrease in inquiries and applications, and 21% of day schools show a slight decrease in enrollment numbers. Boarding schools showed more downward change than day schools in the number of inquiries received, however they were also more likely to show a slight increase in enrollment numbers.

Executive Summary



International students are now a significant part of the independent school enrollment picture; 84% of all responding schools enroll F-1 visa holders, including 76% of responding day schools.

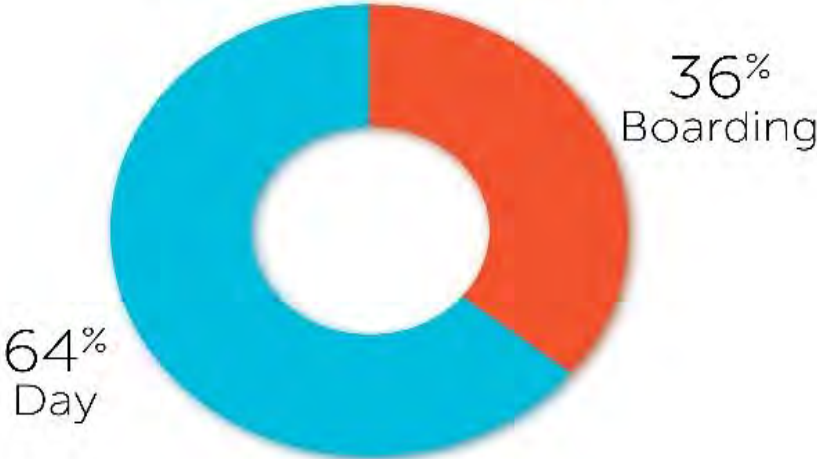
Compared to the overall data, international inquiries and enrollment are slightly down. However, there are widespread changes from the previous year in numbers of international inquiries, applications, and enrollments, and from which countries the activity generates, suggesting a still-shifting market.

Schools seem to be committed to developing these programs: a majority intend to invest resources (money and time) to recruit internationally in the coming year. Finally, schools – especially boarding schools – are looking for assistance in exploring new markets and employing more efficient recruitment practices, presumably as they look to develop and sustain their international programs.

Survey Respondents

252 Total Responses

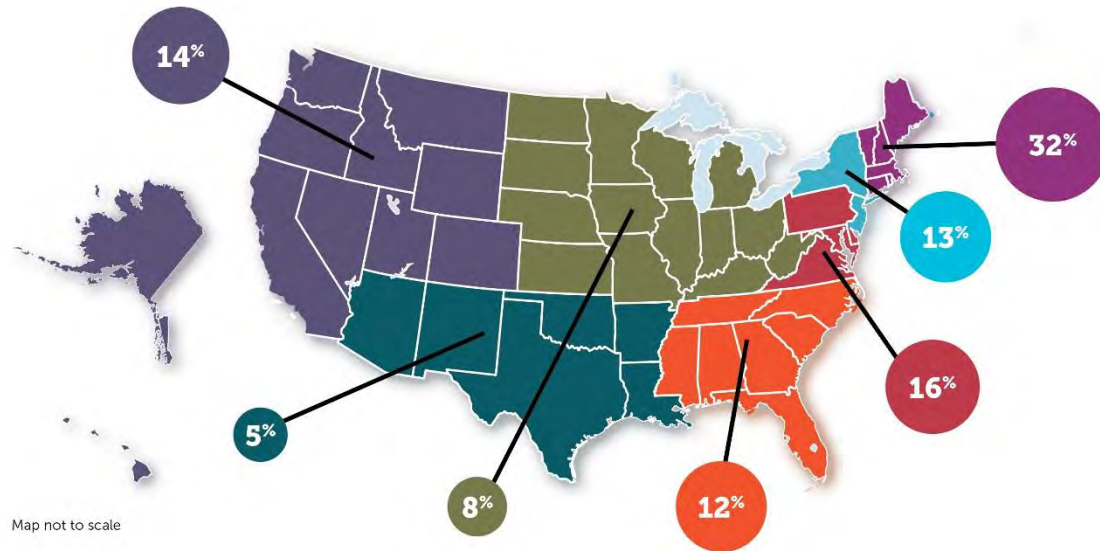
Boarding or Day



Survey Respondents

252 Total Responses

Region



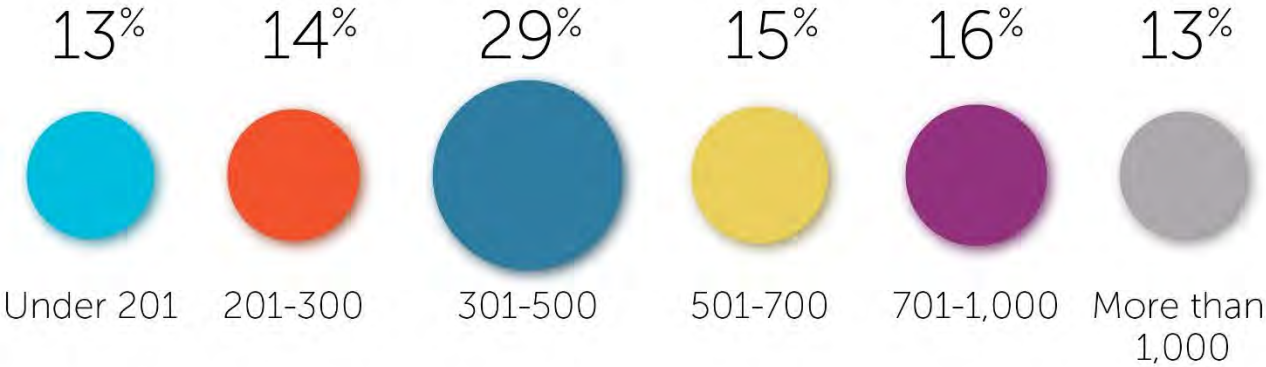
Map not to scale



Survey Respondents

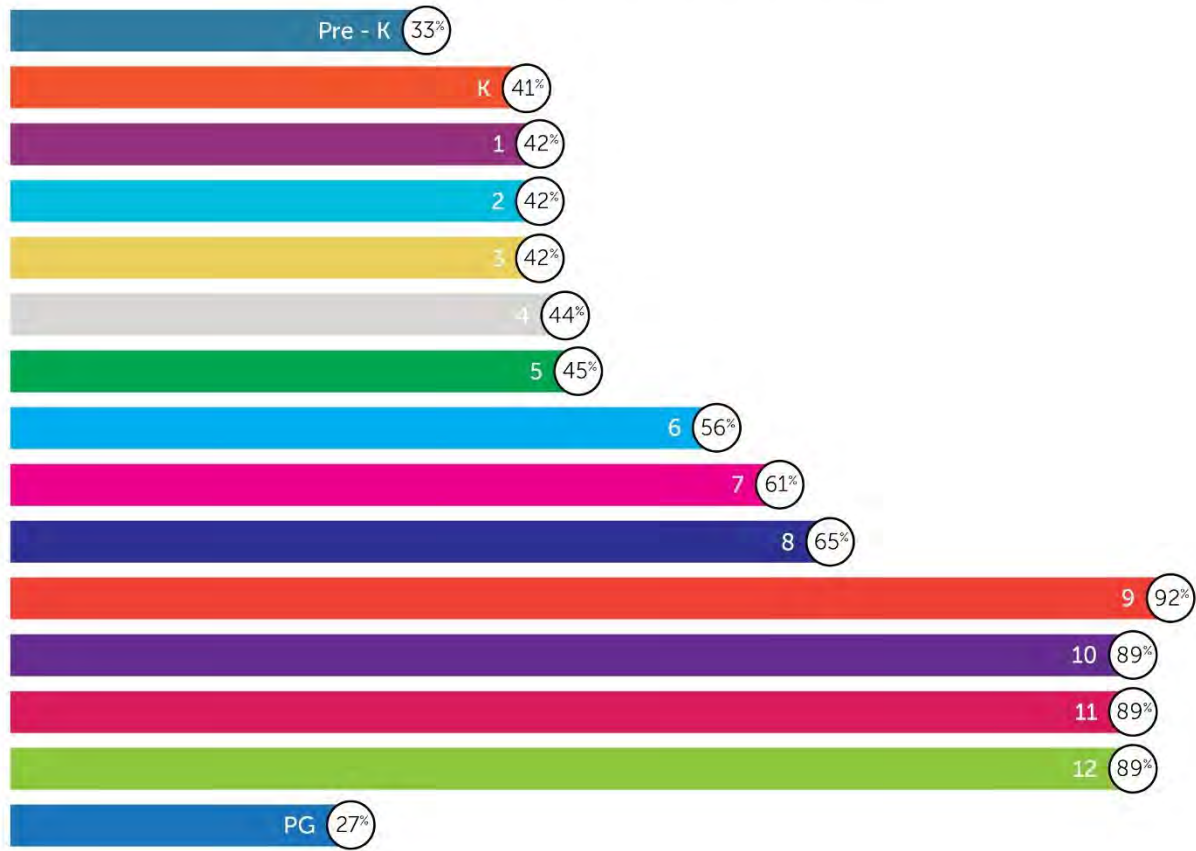


School Size



Survey Respondents

Grades Served



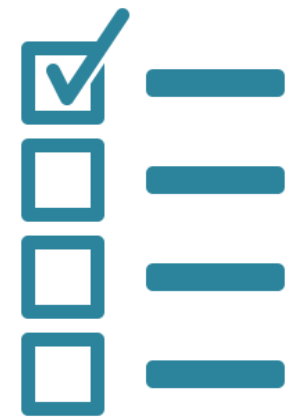
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Inquiries



- Only about a third of respondents (30%) reported that the number of inquiries for the 2016-17 year were “about the same” as for the previous year.
- More respondents (26% vs 19%) indicated inquiries were slightly higher (+1-10%) than slightly lower (-1-10%). Boarding schools were more likely than day schools (23% vs 17%) to report a slight decrease.
- There were very few extreme changes: 6% saw a greater-than-20% increase; 2% saw a greater-than-20% decrease.



Applications



- Less than a third (27%) of schools reported that applications for the 2016-17 year were about the same as for the previous year.
- Significantly more respondents (30% vs 20%) indicated applications were slightly higher (+1-10%) than slightly lower (-1-10%). Responses were similar for day and boarding schools.



Enrollment



- About 43% of schools reported that enrollment was about the same in 2016-17 as for the previous year.
- Nearly a third of all schools (30%) reported a slight increase (+1-10%) in enrollment.
- 21% of day schools reported a slight decrease (compared to 8% of boarding schools).



International Students

- A vast majority of responding schools (84%) enroll students with F-1 visas, including 76% of day schools.
- At the majority of day schools (55%), international students only make up 1-5% of the school population.
- At about one quarter of responding boarding schools, international students make up 16-20% of the school population. This is the most common percentage reported.

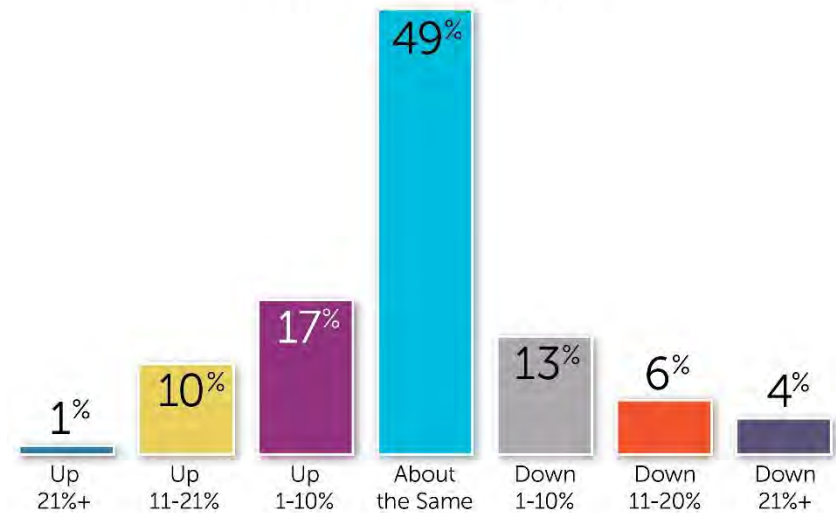


International Inquiries

- About half of all schools reported that the number of inquiries from F-1 visa holders was about the same as for the previous year.
- Boarding schools (39%) were much more likely than day schools (13%) to show some decrease in international student inquiries.

International Inquiries for All Schools

2016-17 vs 2015-16

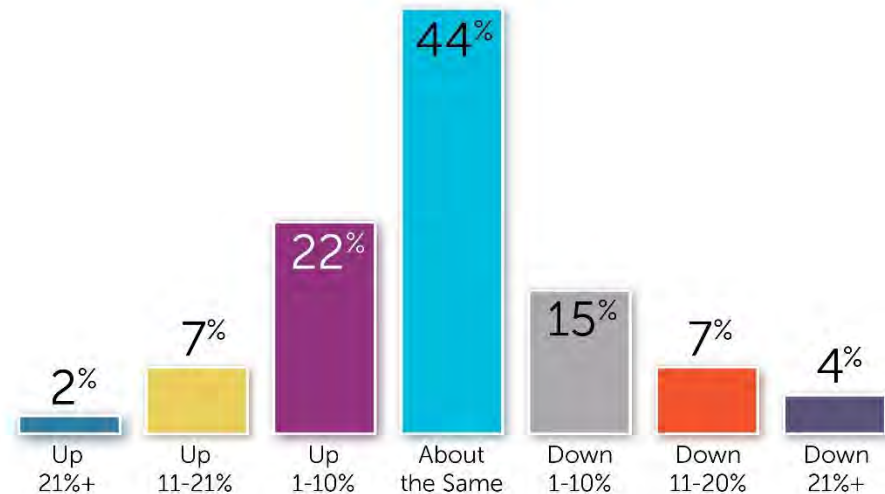


International Applications

- Slightly more schools showed increases in applications from F-1 visa holders than decreases (31% vs 26%) over the previous year.
- Boarding schools showed greater overall fluctuation: 23% reported a slight increase (+1-10%) and 27% a slight decrease (-1-10%).

International Applications for All Schools

2016-17 vs 2015-16

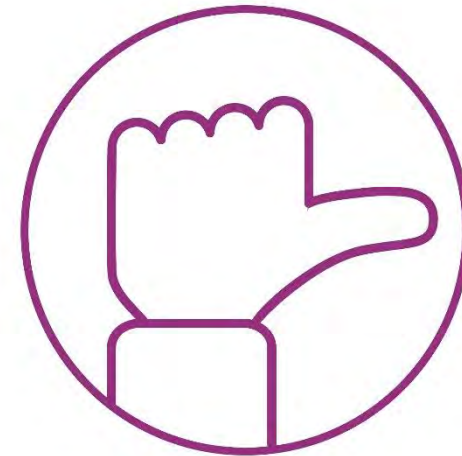


International Enrollment



- Just over half of all schools (55%) reported that international enrollment was about the same for 2016-17 compared to the previous year.
- Just over 20% reported increases and about the same percentage reported decreases.
- Results did not vary greatly for day and boarding schools.

55% same

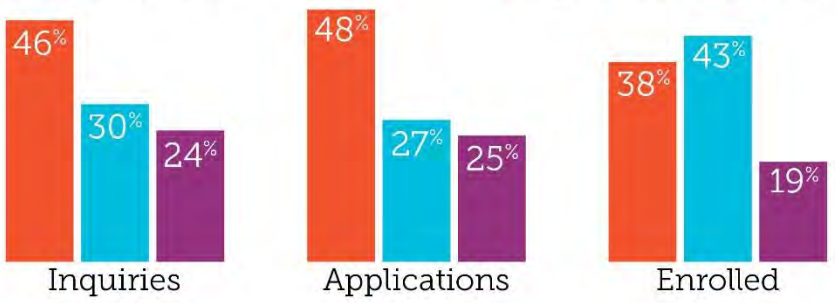


Overall vs. International Enrollment

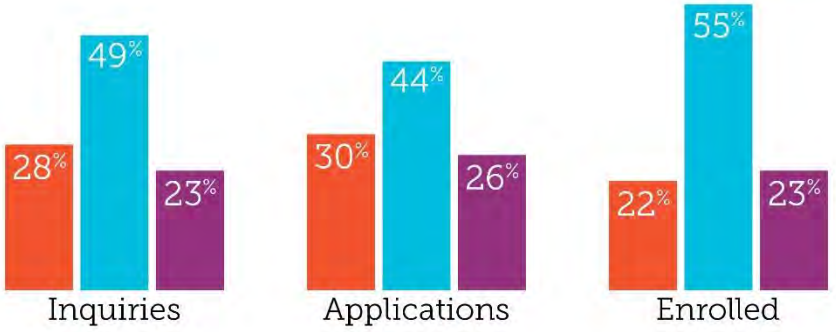


Compared to the overall numbers, international inquiries and enrollment are slightly down.

Overall Numbers: ■ Up ■ Same ■ Down



Among schools that enroll F-1 Visa Holders (84%):



International Markets



- Only about one third of boarding schools said the number of inquiries from China was “about the same” and about 39% said they had decreased to some degree.
- Boarding school inquiries, applications, and enrollment from Mexico, Saudi Arabia, and Korea also showed shifts, primarily downward.
- Although numbers are small, there appeared to be increasing day school admission activity from families in Vietnam, Hong Kong, and Europe, in addition to China.



International Families' Concerns



International families applying for the 2017-18 year articulated the following concerns:

- Perception that the U.S. is less welcoming: 35%
- Increased cost of education due to strength of U.S. dollar: 34% (*For boarding schools, the number was 49%.*)
- Perception that it will be more difficult to obtain a visa: 30%
- Worry that visa requirements will change: 30%
- All of the above: 25% | None of the above: 24%



International Student Recruitment Plans



- More than half of schools (59%) plan to spend about the same amount of money next year on international recruitment, however a significant percent (20%) plan to spend more. Responses were similar for both day and boarding schools.
- Half of the schools plan to spend about the same amount of time abroad to recruit students next year. 20% of all schools (and 25% of boarding schools) plan to spend more time abroad and 10% plan to spend less.



International Student Recruitment Needs



- Help with finding new international markets in which to recruit (67%) and with better/more efficient recruiting (61%) top the list of requests for assistance. These numbers are higher for boarding schools (74% and 70% respectively).
- 37% of schools indicated a need for training of new staff and 21% would like assistance advocating for more budget and staff with other school leaders.

