



NAVIGATING A NEW PARADIGM FOR INTERNATIONAL STUDENT RECRUITMENT

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ACRONYMS

CEC	Canadian Experience Class
CPT	Curricular Practical Training
HEI	Higher Education Institution
IIE	Institute of International Education
KASP	King Abdullah Scholarship Program
MENA	Middle East and North Africa
OPT	Optional Practical Training
SEVIS	Student and Exchange Visitor Information System
SEVP	Student and Exchange Visitor Program
SWB	Science without Borders
USCIS	United States Citizenship and Immigration Services
WENR	World Education News & Reviews
WES	World Education Services

EXECUTIVE SUMMARY



The 2016 election of U.S. President Donald Trump changed the global recruitment landscape for higher education institutions (HEIs), nowhere more than in the nation that elected him.

In the nearly two years since, multiple studies have documented declines in international student enrollments at U.S. institutions. At the same time, media and entities that track developments in higher education have reported increased enrollments in other countries, especially those where costs are lower, quality and access are on the rise, and the social and political environments are more welcoming.

To better understand how these shifts are affecting enrollments, applications, and international recruiting at U.S. institutions, the WES research team surveyed more than 270 higher education professionals in January and February 2018. Our goals were to gain evidence-based insights into changes in enrollment patterns as they play out in real time, and to develop a set of practical recommendations to help institutions across the U.S. weather an ongoing storm.

KEY INSIGHTS

What we learned from the survey confirmed, in part, what others have reported:

- Enrollments and applications are down on the majority of campuses, and many respondents expect to see the declines continue.
- Most respondents (71 percent) told us that the political environment is a cause of their international recruitment challenges. Many noted other factors at play, including rising tuition costs, increased competition from institutions around the globe, and more.

For all the unhappy news, we were also surprised and heartened by some of our findings.

- More than a quarter (28 percent) of respondents, for instance, reported a year-over-year increase in international applications between 2016–17 and 2017–18.
- Notably, the proportion of respondents (51 percent) who reported being optimistic about international enrollments in 2018–19 was slightly greater than the proportion who reported being pessimistic (49 percent).

Our research also helped us understand what many institutions are doing to soften the impact of declines in international student enrollments and to plan for the future of international admissions and recruitment. Broadly speaking, U.S. HEIs are seeking to adapt their enrollment management strategies, as well as provide a welcoming environment for international students. They are also continuing to focus on the long-term and the positive, both in messaging directed at potential enrollees and applicants, and in planning future recruitment strategies.

RECOMMENDATIONS



1. Diversify recruitment targets.

International enrollments from any one country are prone to large fluctuations, and the last year has seen a softening of enrollment numbers among Chinese and Indian students. These drops are significant given that China and India have been reliable top senders by substantial margins for several years. Diversifying the international enrollment funnel is probably always wise; at this juncture it is imperative.



2. Emphasize a welcoming environment.

The national #YouAreWelcomeHere campaign (n.d.) is one way that multiple institutions have banded together to demonstrate solidarity and show support for international students. Eighty-six percent of survey respondents found the campaign effective in helping to reassure international students that the political climate on campus remains distinct from the nation's as reflected in the media.



3. Provide support and resources.

Pre-arrival support can help international students navigate the visa process, help parents manage safety concerns, and highlight support services in the surrounding community as well as those on campus that are available to international students (see Skinner, 2018). Also critical is ensuring that international students on campus have easy access to up-to-date information about immigration and visa policies.



4. Engage in virtual and social media outreach.

Our research suggests that HEIs are forgoing more traditional recruitment methods such as overseas travel in favor of newer and less expensive approaches such as social media. Virtual and social media outreach can be used to develop relationships with students, to inform them of developments in immigration and visa policy that may affect their student status, and more.



5. Engage the alumni network for recruitment.

Alumni can be instrumental in attracting prospective international students. For their upcoming application cycle, 66 percent of our respondents said they planned to engage more with recent international alumni.



6. Address students' financial concerns.

Nearly half of our respondents (45 percent) cited the rising cost of tuition as a challenge to recruiting international students. Although providing scholarships or lowering tuition may not always be possible, institutions can provide advice to help international students understand, manage, and mitigate some of the financial costs of their education.



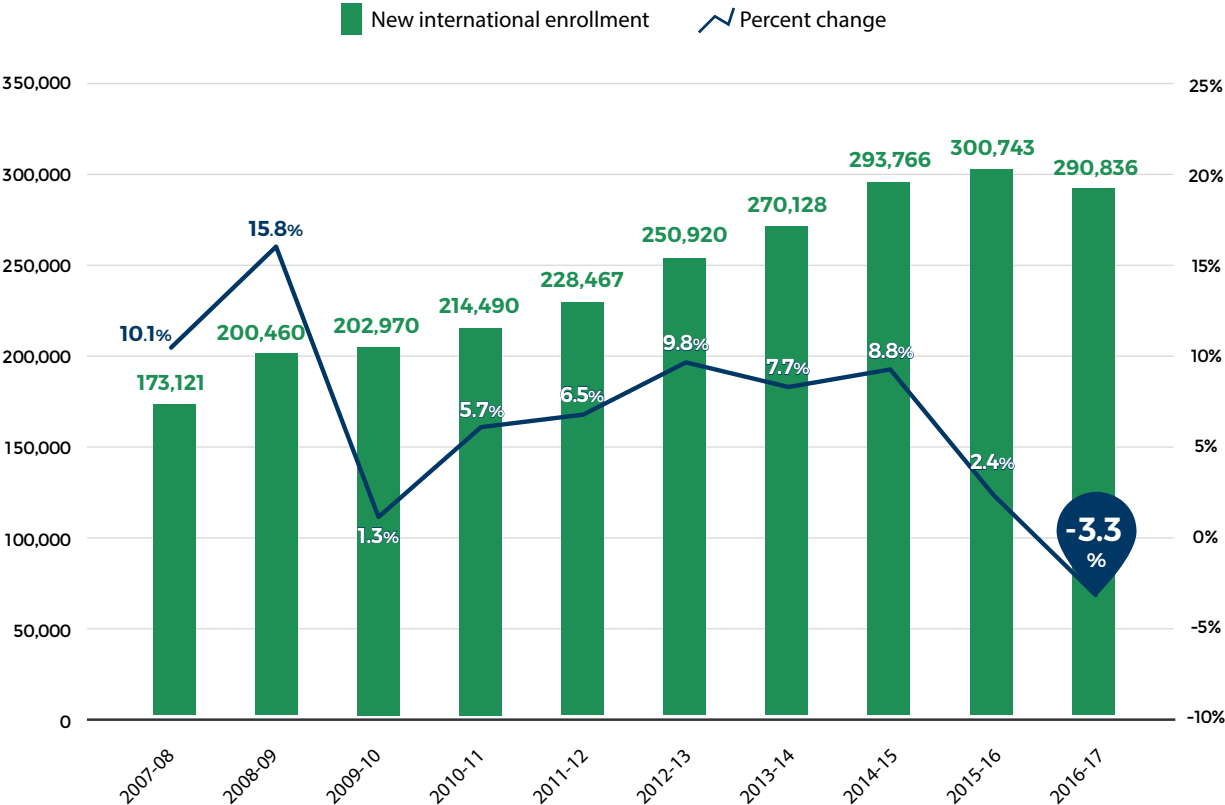
7. Develop and maintain partnerships that can either provide alternative routes to recruitment or facilitate entry.

Community colleges can create a cost-effective pipeline of international students who, after graduating, seek a four-year degree (see Loo, 2016). Secondary schools, which host over 80,000 international students (Farrugia, 2017), can provide a venue for backyard recruiting. Relationships with staff at foreign embassies, ministries, and government education agencies can help ensure a high institutional profile among potential recruits. To ensure more ready access to help with I-20 forms and other visa issues, cultivating relationships with staff at the U.S. Department of Homeland Security's Student and Exchange Visitor Program (SEVP) can be useful.

INTRODUCTION AND SITUATIONAL OVERVIEW

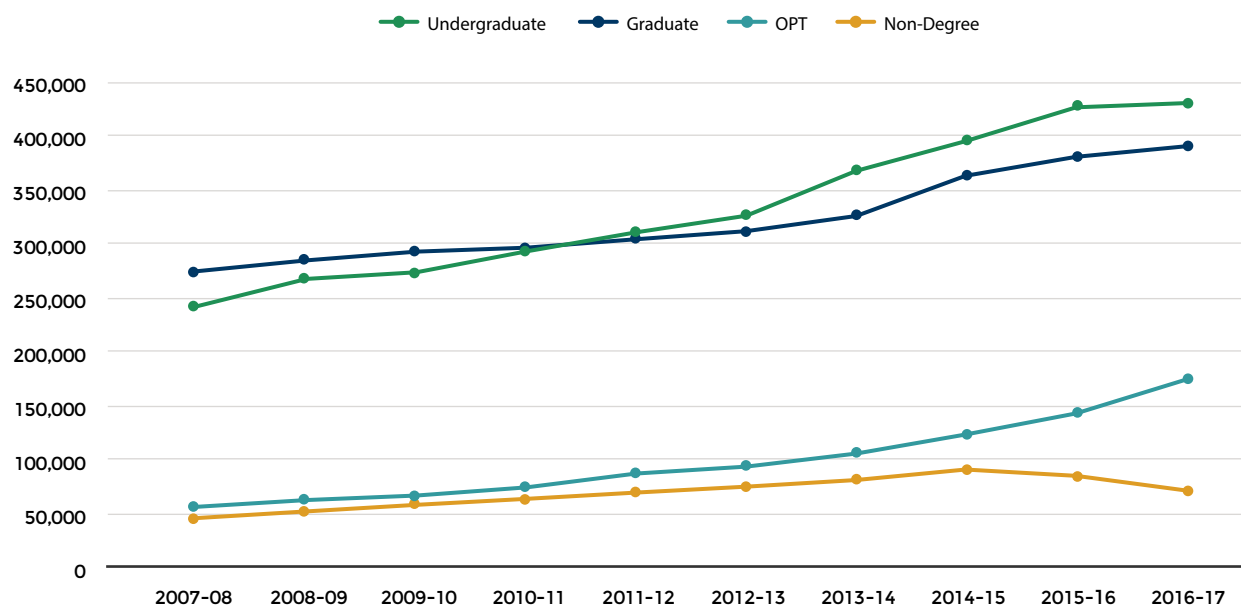
The years 2016 and 2017 have been challenging for U.S. higher education institutions (HEIs) engaged in international student recruitment. Following several years of growth, new international student enrollment declined 3.3 percent for the 2016–17 academic year (see **Figure 1**) in the U.S., according to the Institute of International Education (IIE) (2017a). IIE reported that the decline in the fall of 2017 reached an estimated 6.9 percent and reflected reduced or plateaued enrollment numbers across almost all academic levels (Baer, 2017) (see **Figure 2**).

Figure 1: New International Enrollment at U.S. Higher Education Institutions



Source: IIE Open Doors 2017

Figure 2: International Enrollment at U.S. Higher Education Institutions by Academic Level



Source: IIE Open Doors 2017

Given the evidence of declining international enrollment in the current political climate, the research team at World Education Services (WES) conducted a survey of international higher education admissions professionals in the U.S. Conducted in January and February 2018, this research sought to clarify how institutions have been affected by these recent trends. It also provides the basis for recommended strategies that international higher education professionals can use to operate more effectively in a challenging environment.

Our research sought to answer three main questions:

- How has the U.S. political climate affected international student mobility among respondents?
- How are admissions officers planning to cope with declining international enrollment?
- What international enrollment management strategies are most effective?

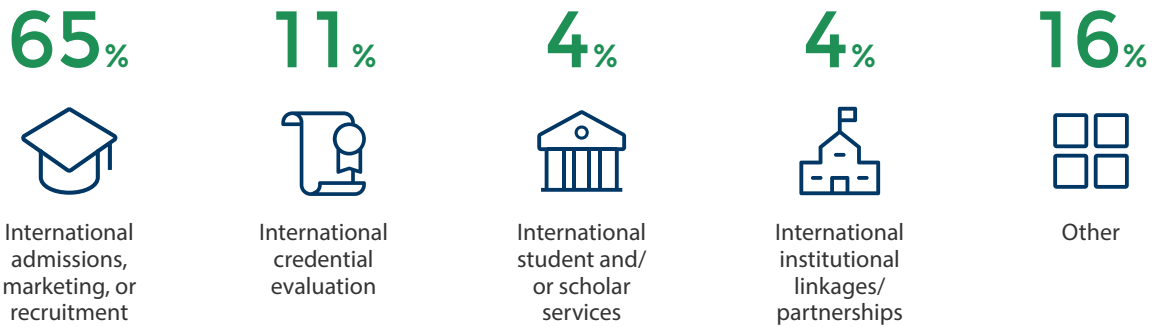
ABOUT THE RESEARCH

WES collected primary data through an online survey made available to admissions professionals at U.S. HEIs from January 31 to February 19, 2018. In total, 270 questionnaires were completed, of which 139 were valid. Valid responses passed the filter questions; that is, they were provided by those who worked in international admissions at a U.S. HEI. In addition, multiple responses from one school within a university were filtered to select only one response, which was chosen by seniority of job role and completion of the survey. Responses from the same institution but different offices or schools were retained. We offered an incentive to complete the survey: a prize drawing for one of two \$250 donations to the participant's preferred scholarship program. Respondents' quotes included in this report have been edited, and any spelling and grammatical errors corrected.

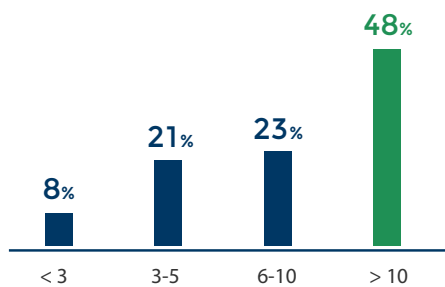
Figure 3: Respondent Profile

Primary Area of Responsibility (n=134)

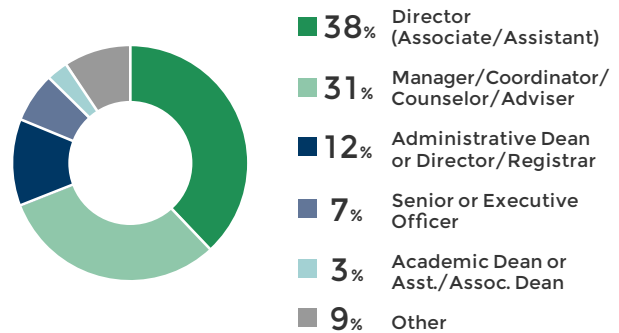
Removed 'N/A' responses.



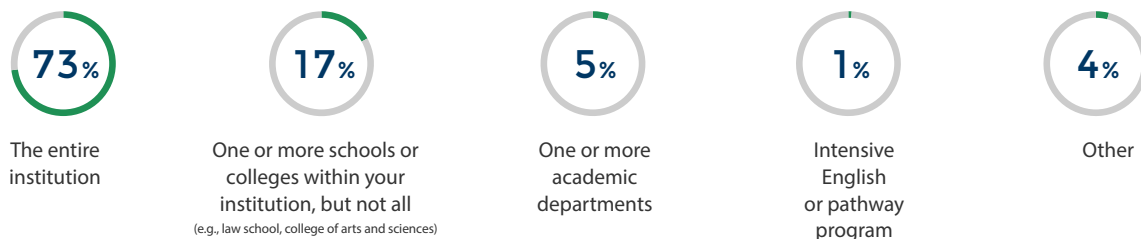
Years of Experience Working in Higher Education (n=139)



Current Role in Institution



Scope of Responsibility for Office/Department (n=139)



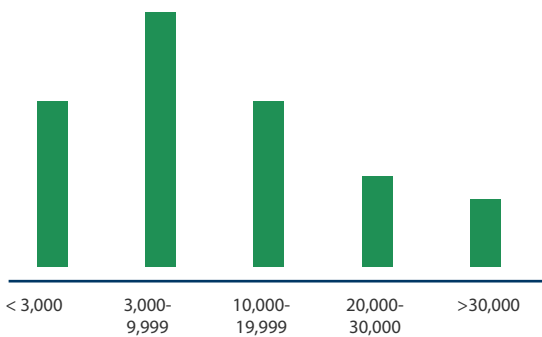
At the time they completed the survey, the majority of respondents (65 percent) worked primarily in international admissions, marketing, or recruitment; and 48 percent had more than 10 years of experience. Most respondents were associate or assistant directors (38 percent). Thirty-one percent were managers, coordinators, counselors, or advisers. Seventy-three percent of respondents worked in departments responsible for the entire academic institution, and 17 percent were responsible for one or more schools or colleges within their academic institution.

Figure 4: Institutional Profile

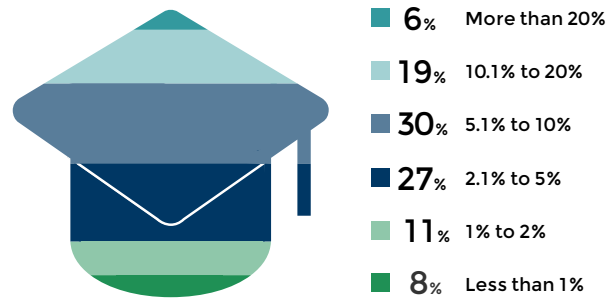
Type of Institution (n=137)



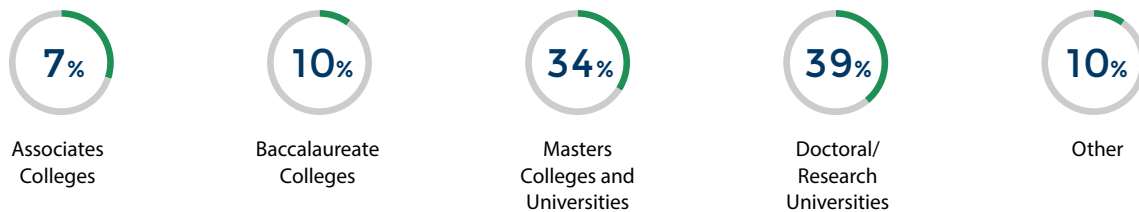
Total Student Enrollment (n=138)



Proportion of International Students (n=138)



Carnegie Classification (n=137)



More than half of respondents were from public institutions (54 percent). Forty-five percent worked at private nonprofit institutions. Only 1 percent represented private for-profit institutions. The plurality of respondents were from institutions classified as doctoral or research universities (39 percent), closely followed by master’s colleges and universities (34 percent). Ten percent worked at baccalaureate colleges; 7 percent, associate’s colleges, and 10 percent, “other” institutions (typically specialized schools, such as business or law). Thirty-four percent of respondents were employed by institutions educating 3,000 to 9,999 students; 57 percent of institutions had international student populations of 2.1 to 10 percent.

SETTING THE STAGE: A CHANGING INTERNATIONAL HIGHER EDUCATION LANDSCAPE

At a macro level, the recruitment environment in which we conducted this research is complex. Across the globe, international students are increasingly seen as providing value not just to the institutions they attend, but to their host communities as well. They increase diversity on campuses. They bring economic benefits to the communities they live in. They serve as a ready pipeline of well-integrated and -educated immigrants ready to fill skill gaps in the job market. The competition to recruit these students has thus gone global.

Long viewed as a prime destination for these students, the U.S. has, for a variety of reasons, begun to lose its edge.

Increased Global Competition

Institutions worldwide, often with government support, have implemented several measures to recruit and retain international students. China, for example, the top sender of international students, has started its own efforts to become an international higher education destination. In 2012, the Chinese government announced an initiative to meet its goal by hosting 500,000 international students by 2020 (Schulmann & Ye, 2017). By all accounts, the country has made significant inroads and has done so very quickly. Only a decade ago, China hosted relatively few international students; as of 2017, it had become the third largest host country for such students, according to IIE's Project Atlas (IIE, 2017b). And it's not just China.

The meteoric rise of educational options in countries that have comparatively affordable, and in some instances, free education systems (Bothwell, 2017) has also exacerbated the difficulty for U.S. institutions seeking to demonstrate the return on investment of a U.S. education.

Another challenge is the proliferation of high-quality, affordable education options in English, which has strained the ability of U.S. HEIs to attract international students. A 2017 ICEF Monitor article detailed the stunning growth of English-taught degree programs. According to the article, the number of European bachelor degree programs taught in English increased from nearly zero in 2009 to almost 3,000 in 2017.

Concern About Future Work Opportunities

Savvy prospective international students are also highly conscious of how their education translates into opportunities to work and immigrate. The U.S. has begun to assume an extremely defensive posture on immigration and to curtail international student work opportunities. These positions do not bode well for recruiters seeking to attract career-conscious international recruits to U.S. campuses.

“ [There is] competition from other countries who are more welcoming, provide fewer immigration hurdles, better value (tuition incentives, including resident tuition, and other cost saving measures), and incentives to remain in country for OPT or permanent residence.”

- International admissions expert at a public doctoral university

Meanwhile, the governments of other countries have begun to implement policies that enable international students to gain work experience and parlay their education into a path to immigration. The Canadian government, for instance, has created the Canadian Experience Class (CEC), which provides a route to permanent residency for international students (Le, 2017a). It also recently passed a law that reduces the time required for immigrants to become Canadian citizens. The CEC, in conjunction with a national strategic plan to attract 450,000 international students by 2022, is indicative of the international challenges confronting U.S. institutions as they try to increase their appeal to prospective international students.

Canadian HEIs have capitalized on their government's move to attract global students. The University of Toronto, a prominent Canadian university, eliminated international student fees for PhD students in January 2018 (Szkłarski, 2018). The university will now charge international doctoral students the same tuition as domestic students—a huge draw for cost-sensitive students. Many universities have followed suit, such as the University of Ottawa, Western University, and Brock University (Study International (SI), 2018a).

Changes in Visa Availability

International students who are sensitive to changes in visa policy may be concerned about the increasing difficulty of obtaining a U.S. visa. Data from the U.S. State Department show that the number of visas issued to foreign students fell significantly last year: F-1 student visas dropped 17 percent from the previous fiscal year, and dropped 40 percent from 2015. The decline in issuances of F-1 student visas is a mixture of both fewer applications and higher refusal rates. In the 2015 fiscal year, over 850,000 applications were submitted (Department of State (DOS), 2015); the visa issuance rate was 75 percent. In 2017, around 600,000 applications were submitted (DOS, 2017); the visa issuance rate was 65 percent.

“ [There is a] lack of certainty regarding the immigration policy in the U.S., [and] that sends a message to the welcome students [will receive] should they come to the U.S. They are hesitant to come to a country where the president ‘doesn’t like them’”

- Respondent from a private master's university

The biggest declines in such visas represent the loss of students from Asian countries, particularly China (-24 percent) and India (-28 percent) (Meckler & Korn, 2018). Students from these two countries comprised 33 percent and 17 percent of all international students in the U.S. during the 2016–17 academic year (IIE, 2017a).¹

H-1B visas, which are required for international students to work long-term in the U.S. after graduation, are also becoming increasingly difficult to obtain. One of our survey respondents noted the impact on campus:

“As corporations and organizations are reducing their H1-B visas, our ability to help our students seek out positions is significantly hindered. These are generally areas out of our control but have a multiplier effect on our future enrollments. . . . Of course, our political environment is extremely negative, making a U.S. education and post-graduation job prospects far less attractive.”

United States Citizenship and Immigration Services (USCIS) has in the last year increased its scrutiny of H-1B visa applications (Economic Times, 2018) and added documentation requirements (Sheng, 2018). Meanwhile, the competition for an H-1B visa has become fierce, as the cap for the number of available visas has not changed since 1990. This year, the caps of 65,000 visas for bachelor degree holders and 20,000 visas for advanced degree holders were met within just five days—as it has for the past six years (SI, 2018b).

Loss of Prominent Government-Sponsored Scholarship Programs in Key Sending Countries

International students able to receive visas and undeterred by increasingly strict visa policies may still be hindered by developments in their home countries. Specifically, reductions in prominent governmental scholarships have reduced international student flows to the U.S. The King Abdullah Scholarship Program (KASP), founded in 2005, covered full tuition, medical insurance, some living expenses, and traveling fees for Saudi Arabian students pursuing an education abroad. In fact, during the 2014–15 school year, almost all Saudi Arabian students in the U.S. were supported by KASP, making the program a primary driver of the steady growth of enrollments at U.S. universities (Ortiz, 2016). However, as Saudi Arabia dealt with historically low oil prices, it tightened KASP requirements in 2016 and introduced a series of new conditions regarding what and where students could study (Paul, 2016). As a result, following years of growth bolstered by KASP, in 2016–17 the U.S. saw a 14.2 percent decrease in enrollment from Saudi Arabian students (IIE, 2017a).

Similarly, Brazil's Science without Borders (SWB) program, which funded Brazilian STEM students studying abroad, was radically scaled back in 2015, leading to an 18 percent drop in enrollments during 2015–16 (Trines, 2017b). Later, the program was entirely eliminated. An economic collapse in Brazil that led to steep cuts in government programs has exacerbated the decrease in Brazilian students.

Isolationist Political Environment in the United States

In the U.S., nationalistic rhetoric and isolationist policies have compounded the challenges of international recruitment. Among potential international students and their families, there is new doubt that the U.S., and by extension, its higher education system, are safe and welcoming environments for them. According to Inside Higher Ed's "2018 Survey of College and University Presidents," 69 percent of respondents believe that the political rhetoric in the U.S. is making it more difficult to recruit international students (see Lederman, 2018).

Meanwhile, 32 HEI leaders signed an amicus brief filed with the U.S. Supreme Court to voice their opposition to President Trump's travel ban against primarily Muslim countries (Sinclair, 2018). In their view, the ban has a negative effect on foreign students, scholars, and faculty.

IIE's report **Shifting Tides: Understanding International Student Yield for fall 2017** (Farrugia & Andrejko, 2017) found evidence of growing anxiety among international students. Eighty percent of institutions observed that Indians are concerned with "physical safety," while 41 percent indicated that students from the Middle East feel unwelcome in the U.S. Institutions also reported that undergraduate applications from India and China have fallen: 26 percent of institutions reported declines from India, and 25 percent, from China.

Overall, the IIE survey found that 39 percent of responding institutions reported a decline in international applications, 35 percent reported an increase, and 26 percent reported no change—figures which are consistent with our own analysis.

INTERNATIONAL ADMISSIONS IN FLUX: WHAT WES RESEARCHERS SAW

KEY FINDINGS

- More than half of WES survey respondents saw a decrease in international student **applications**² from the 2016–17 to 2017–18 application cycle at their institution (see **Figure 5**).
- Twenty-eight percent of respondents reported an increase in **applications** from the 2016–17 to 2017–18 application cycle at their institution (see **Figure 5**).
- Half of the respondents (50 percent) saw a decrease in the total number of **enrolled** international students from the 2016–17 to 2017–18 application cycle (see **Figure 8**).
- Twenty-nine percent saw an increase in the total number of **enrolled** international students from the 2016–17 to 2017–18 application cycle (see **Figure 8**).
- Forty-five percent of institutions anticipate a decrease in international **enrollment** for the upcoming 2018–19 academic year; 35 percent of institutions expect an increase (see **Figure 11**).
- All regions except the Northeast saw a greater decrease in international student applications and enrollment than an increase (see **Figure 13**).

Much of what the WES research team uncovered confirmed reports already in the field. For instance, over half (52 percent) of our survey respondents did not meet their international enrollment goals for the 2017–18 academic year.

However, despite the widespread, steep declines that many institutions have experienced, many respondents remained optimistic about the potential for international student recruitment: 35 percent of institutions predict an increase in international enrollment (see **Figure 11**).

CHANGES TO INTERNATIONAL APPLICATIONS FOR THE 2017-18 ACADEMIC YEAR: DISCUSSION

Sixteen percent of schools that experienced decreases in applications had decreases of 5.1 to 10 percent. Fifty-five percent of our respondents worked at institutions where international students make up more than 5 percent of the student body (see **Figure 4**); therefore, a decrease in international students of more than 10 percent, or even more than 5 percent, would have a large impact on the cohort size.

Figure 5: Overall Change in International Applications for the 2017-18 Application Cycle (n=129)



Q: Did your institution see a change in the total number of applications from international students from the 2016-17 to the 2017-18 application cycle?

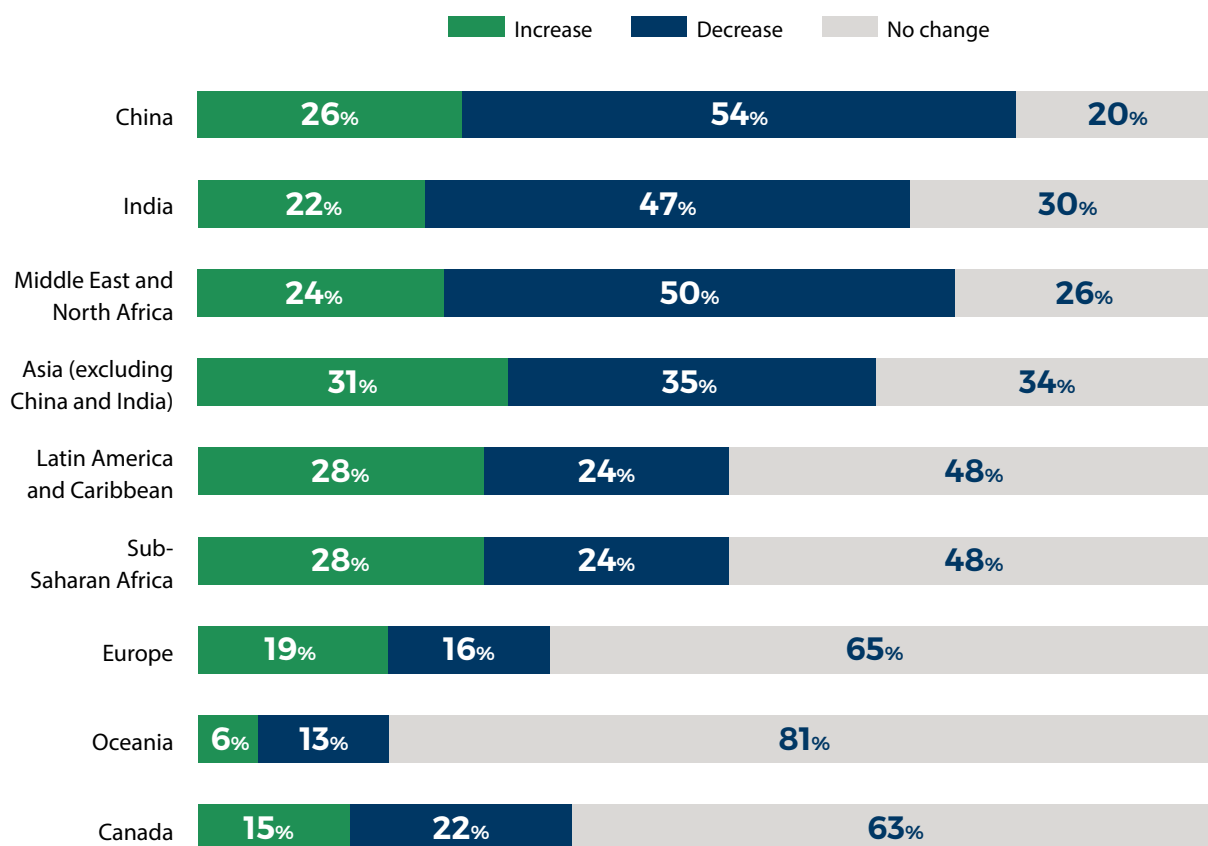
Note: "Don't know" responses removed from analysis. "A significant decrease" and "some decrease" combined. "A significant increase" and "some increase" combined.

Applications from China decreased the most (54 percent); followed by the Middle East and North Africa (50 percent); and India (47 percent) (see **Figure 6**).

Because China and India are the two top senders of international students to the U.S., the large decreases in both applications and enrollments have had a profound impact on those HEIs which have not significantly diversified their source markets beyond those regions. The declines are a wakeup call for institutions to think more strategically about how and where they recruit international students.

The large decreases in applications from the MENA region—an area that includes many of the countries targeted by President Trump's travel ban—seem to confirm the warnings of higher education officials that the ban would hinder U.S. institutions' ability to attract international students. Although the drastic decreases from Saudi Arabia specifically are largely attributable to the stricter requirements of KASP, there is evidence that the political climate and travel ban³ have exacerbated the effect of the KASP restrictions (Andrews & Mattern, 2017).

Figure 6: Change in International Applications by Region for the 2017-18 Application Cycle (n=99)



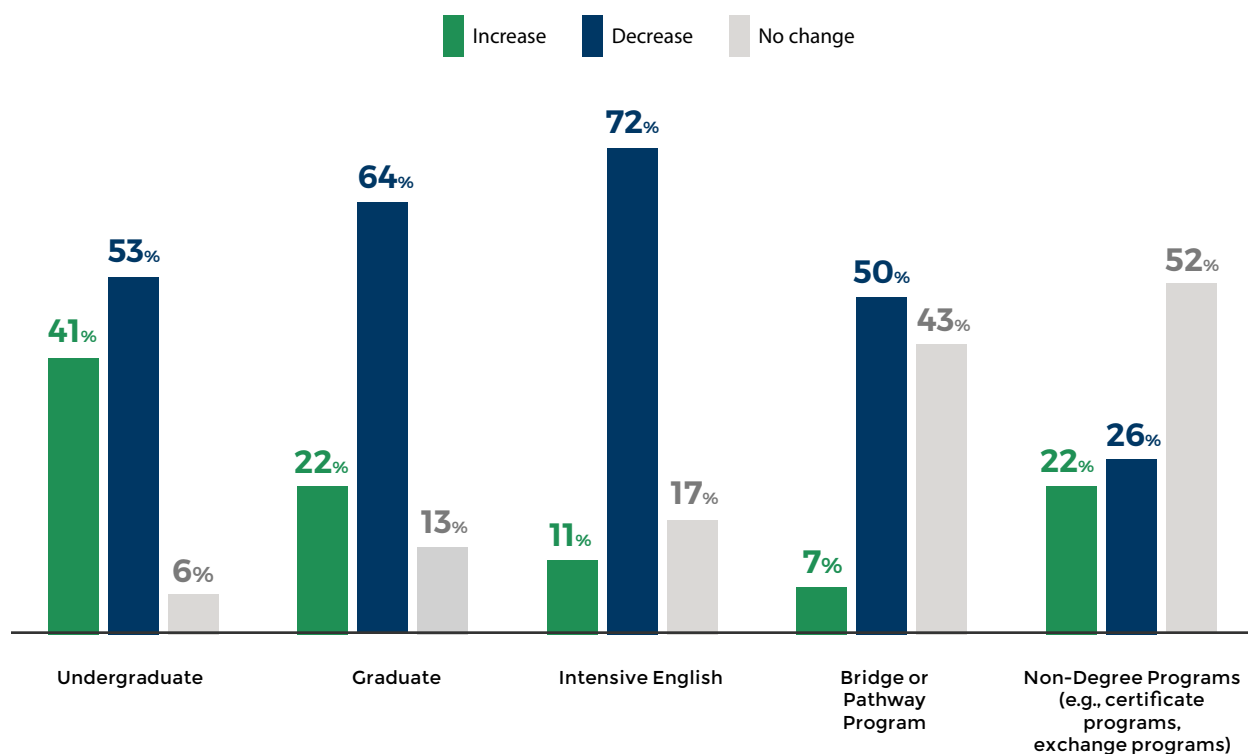
Q: What change in applications from the following regions did you experience from the 2016-17 to the 2017-18 application cycle?

Those who answered “No Change” to “Did your institution see a change in the total number of applications from international students?” did not answer this question. “Not applicable” responses removed from analysis. “A significant decrease” and “some decrease” combined. “A significant increase” and “some increase” combined.

At all academic levels, except non-degree programs, more institutions saw a decrease in international student applications than an increase. Intensive English programs in particular saw large declines, with 72 percent of institutions experiencing a decrease in applications (see **Figure 7**). This figure corresponds with IIE’s “Open Doors” report, which found that the number of international students in the U.S. enrolled in intensive English courses declined by 25.9 percent from the 2015–16 to the 2016–17 academic year (Redden, 2017).

Both graduate and undergraduate programs faced significant decreases as well, with 64 percent and 53 percent of institutions, respectively, reporting application declines (see **Figure 7**). Because the decrease in applications affects only the class of incoming international students, total enrollment will not be immediately affected. However, the lower application numbers correspond to the modest growth rates reported by IIE (2017a): 1.9 percent for international graduate students and 2.7 percent for international undergraduate students. Compare those growth rates with those of 2015–16, when graduate programs saw 6 percent growth and undergraduate, 7.1 percent.

Figure 7: Change in International Applications by Academic Level for the 2017-18 Application Cycle (n=85)



Q: For the following academic levels/programs, what change in international student enrollment did your institution experience from the 2016-17 application cycle to the 2017-18 application cycle?

Note: Those who answered "No Change" to "Did your institution see a change in the number of enrolled international students?" did not answer this question. "Not applicable" responses removed from analysis. "A significant decrease" and "some decrease" combined. "A significant increase" and "some increase" combined.

BY THE NUMBERS: CHANGES TO INTERNATIONAL ENROLLMENT FOR THE 2017-18 ACADEMIC YEAR

Decreases in applications corresponded with enrollment declines. Half of the respondents (50 percent) saw a decrease in the total number of enrolled international students from the 2016–17 to the 2017–18 application cycle (see **Figure 8**). Twenty-nine percent saw an increase, and 21 percent experienced no change. These numbers correspond with IIE’s findings, which reported that 45 percent of institutions saw a drop in new international enrollment (Redden, 2017). Of those, 23 percent reported a decrease of more than 10 percent. Thirty percent of institutions experienced a decrease of 5.1 to 10 percent.

Figure 8: Institutions that Experienced Change in International Enrollment for the 2017-18 Application Cycle (n=128)



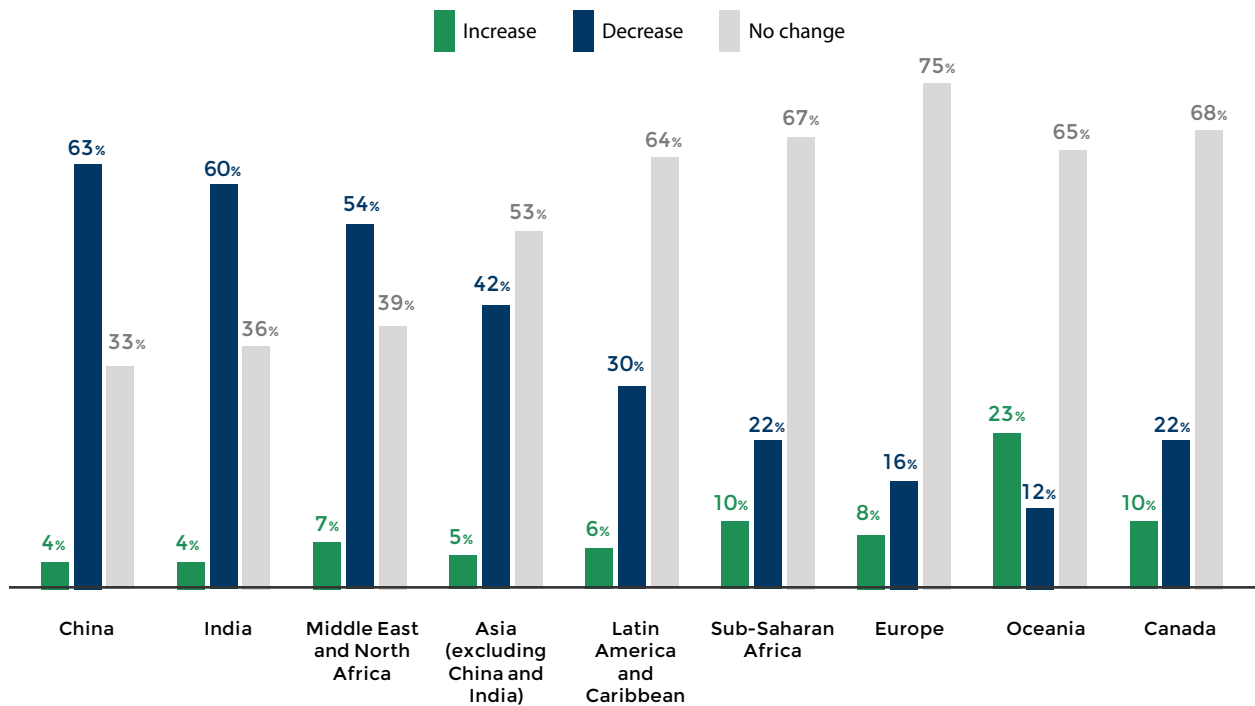
Q: Did your institution see a change in the number of enrolled international students from the 2016-17 to the 2017-18 application cycle?

Note: "Don't know" responses removed from analysis. "A significant decrease" and "some decrease" combined. "A significant increase" and "some increase" combined.

China represents the largest decline in enrollment (63 percent), followed by India (60 percent) (see **Figure 9**).

Data from the Department of Homeland Security's Student and Exchange Visitor Information System (SEVIS) in 2017 also indicate a slowing of growth in student numbers from China. For the quarter ending April 2017, Chinese enrollment declined for the first time since 2004, by more than 2 percent (Trines, 2017a). According to WES's own credential evaluation data, applications from Indian students have dropped significantly as well (Trines, 2017a).

Figure 9: Change in International Enrollment by Region for the 2017-18 Application Cycle (n=97)



Q: What change in enrollment from the following regions did you experience from the 2016-17 to the 2017-18 application cycle?

Note: Those who answered "No Change" to "Did your institution see a change in the number of enrolled international students?" did not answer this question. "Not applicable" responses removed from analysis. "A significant decrease" and "some decrease" combined. "A significant increase" and "some increase" combined.

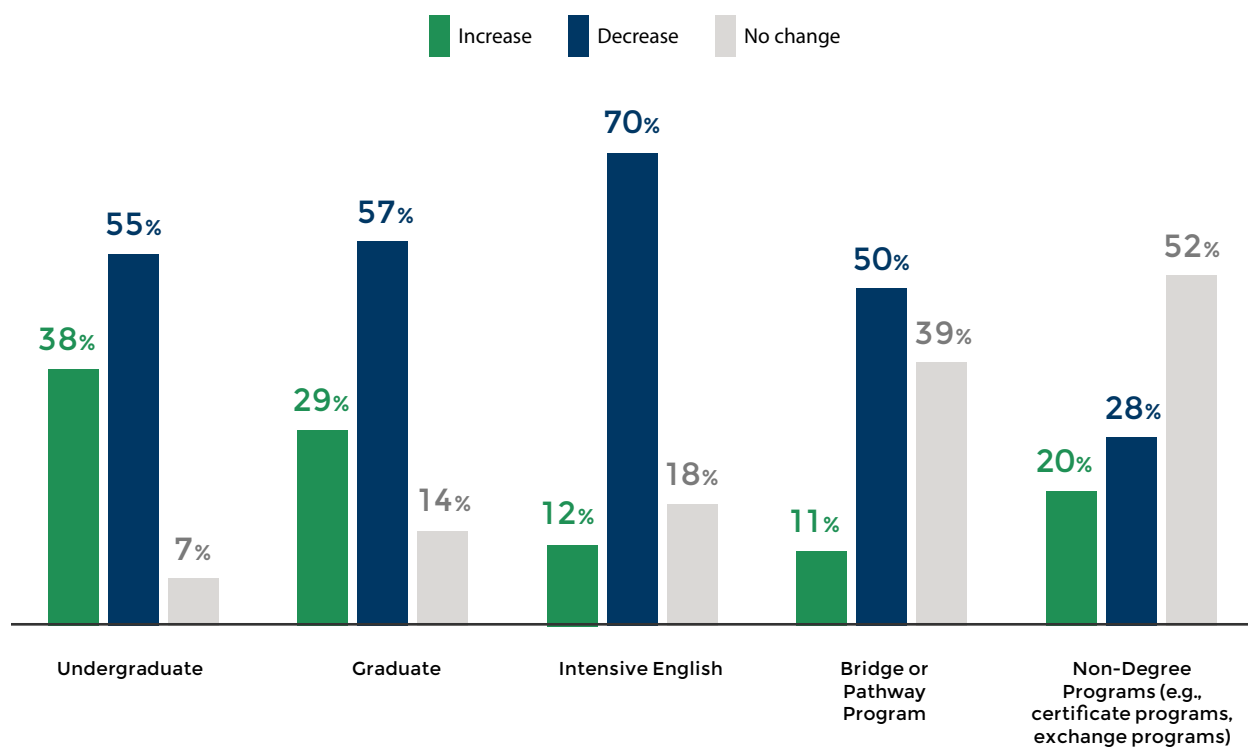
Among the programs and institutions we studied, intensive English programs saw the largest declines, with 70 percent of institutions reporting a decrease in international student enrollment (see **Figure 10**). The percentage declines reported by our respondents likely also reflect large national enrollment declines from Saudi Arabia (57 percent), Vietnam (42 percent), Kuwait (37 percent), and Brazil (37 percent) (IIE, 2017a). The 57 percent decline in students from Saudi Arabia, which sent over 11,000 students to the U.S. during the 2015–2016 school year to study intensive English, represents a decline in volume of almost 6,500 fewer students.

All other programs saw enrollment declines as well: 57 percent of graduate programs, 55 percent of undergraduate programs, 50 percent of bridge or pathway programs, and 28 percent of non-degree programs (see **Figure 10**). Saudi Arabia and Turkey, which are among the top 10 senders of international graduate students to the U.S., saw declines of 7.1 percent and 6.8 percent for graduate students for the 2016–17 school year (IIE, 2017a).

Large declines in enrolled students from Saudi Arabia and Brazil are most likely due to the loss of generous scholarships these countries previously offered, making it more difficult for their students to afford to study in the U.S.

As one respondent noted, “99.9 percent of the time, the reason why we lose an international student is due to costs. They cannot afford to come to the U.S. and pay tuition without substantial scholarships/aid.” Although funds may not be available to increase international student scholarships, institutions can make other financial concessions. According to a recent WENR article (Schulmann, 2017), students who have smaller budgets tend to apply to fewer schools. Thus, providing an application fee waiver can be a good strategy to encourage students to apply.

Figure 10: Change in International Enrollment by Academic Level for the 2017-18 Application Cycle (n=82)



Q: For the following academic levels/programs, what change in international student enrollment did your institution experience from the 2016-17 application cycle to the 2017-18 application cycle?

Note: Those who answered “No Change” to “Did your institution see a change in the number of enrolled international students?” did not answer this question. “Not applicable” responses removed from analysis. “A significant decrease” and “some decrease” combined. “A significant increase” and “some increase” combined.

U.S. INSTITUTIONS REMAIN (CAUTIOUSLY) OPTIMISTIC

Our survey data indicate that while international student interest is declining overall, those that come here are shifting where they study in the U.S. and prioritizing specific institutions.

Similarly, although 45 percent of institutions expect the declines to continue into the upcoming academic year, 35 percent believe that their enrollment numbers will increase (see **Figure 11**). This may be due to some institutions’ exhibiting positive results. Twenty-nine percent experienced an increase in international enrollment (see **Figure 8**), and of those, 46 percent saw an increase of more than 5 percent. In addition, 38 percent of undergraduate programs saw an increase in international

enrollment (see **Figure 10**), with large increases from Oceania (23 percent), Canada (10 percent), and Sub-Saharan Africa (10 percent) (see **Figure 9**). In fact, HEIs seem to be relatively optimistic about their international enrollment prospects for the upcoming application cycle.

Figure 11: Anticipated Change in International Enrollment for 2018-19 (n=139)



Q: What change in international enrollment do you anticipate for the upcoming 2018-19 academic year?

Note: "A significant decrease" and "some decrease" combined. "A significant increase" and "some increase" combined.

Surprisingly, respondents reported greater optimism vis-a-vis Chinese (65 percent) enrollment than enrollment from other regions, despite China's large application and enrollment declines (see **Figure 12**). Given the huge presence of students from China on U.S. campuses, it is possible that this optimism reflects a belief that Chinese students will continue to enroll in their schools because they have in the past. It could also reflect an unfamiliarity with smaller markets.

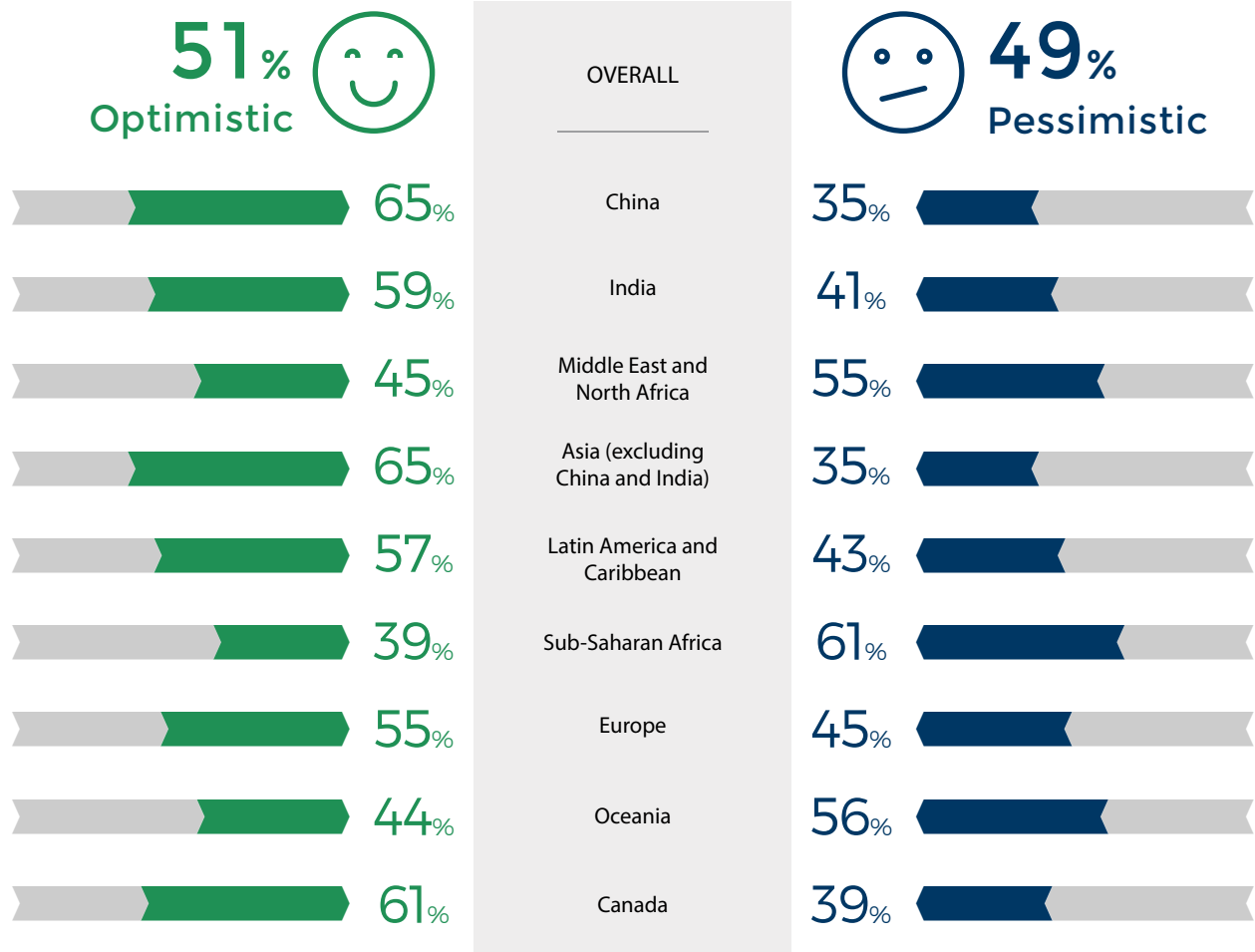
Institutions (55 percent) were pessimistic about enrolling students from the MENA region. This pessimism most likely stems from concerns about proposed travel bans that have primarily targeted MENA countries, making both recruitment and enrollment from this region more challenging.

Recommendation

Given the challenge of international recruiting, along with the large body of evidence pointing to students' concerns about studying in the U.S., institutions should reflect on how to best utilize their resources (IIE, 2017c). A good place to start is a focus on messaging that conveys the openness of U.S. HEIs to international students. Doing so can help allay the concerns of students who are anxious about feeling welcome during their college career. As one respondent suggested, "be transparent, responsive, and showcase positive experiences of international students on campus."

Institutions must also consider the long-term implications of these declines when determining which countries to focus their recruitment efforts on. The downward trend highlights the need for institutions to diversify their enrollment funnel in order to maintain international student numbers.

Figure 12: Outlook on International Enrollment for 2018-19 Academic Year by Region (n=134)



Q: To what extent is your institution optimistic or pessimistic about international enrollment from the following regions for the 2018- 2019 academic year?

Note: "Not applicable" and "Neutral" responses removed from analysis. "Very pessimistic" and "somewhat pessimistic" combined. "Very optimistic" and "somewhat optimistic" combined.

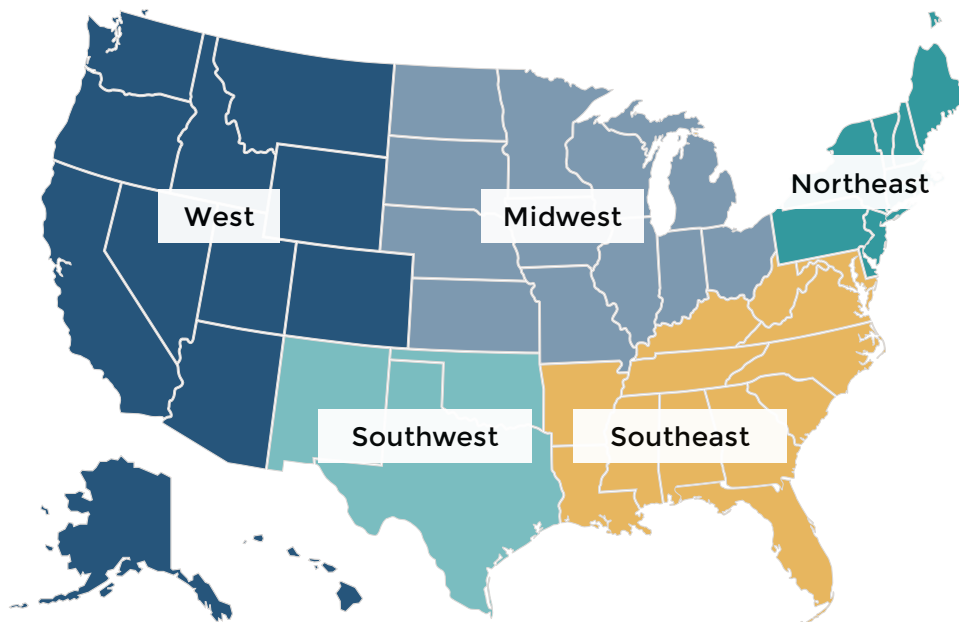
HIGHLIGHTED FINDINGS BY U.S. REGION

Our research sought to uncover whether certain regions of the U.S. were disproportionately affected by these changing mobility patterns, and whether prospective international students who sought a U.S. education may have chosen a different school based on election outcomes.


The survey results confirm that declines in applications and enrollments disproportionately affected specific regions of the country.

- All regions except the Northeast saw a greater decrease than an increase in international student applications and enrollment (see **Figure 13**).
- Forty-three percent of institutions in the Northeast experienced an increase in international **applications**; 38 percent saw an increase in international student **enrollment**.
- The Southwest had the largest percentage of institutions reporting decreases in **applications** (86 percent) (see **Figure 13**).
- The West had the largest percentage of institutions that saw a decrease in **enrollment** (61 percent).


Figure 13: Change in Applications and Enrollment by U.S. Region



 **Change in Applications**

	 Increase	 Decrease
Southeast	24%	48%
Midwest	31%	53%
West	17%	70%
Southwest	14%	86%
Northeast	43%	36%

 **Change in Enrollment**

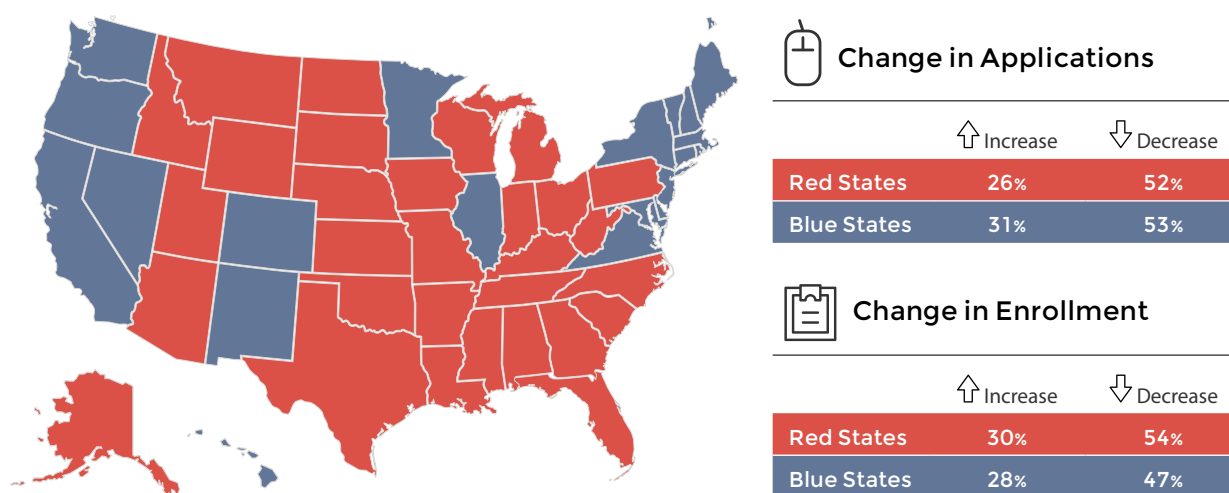
	 Increase	 Decrease
Southeast	28%	50%
Midwest	31%	53%
West	17%	61%
Southwest	29%	57%
Northeast	38%	38%

Note: Removed "Don't know/Not applicable" and did not show results for "No change." Does not include U.S. territories.

Our survey results do not indicate, however, that the changing patterns reflect the voting outcome of the state in which the institution is located. When we recoded states by voting outcomes from the 2016 presidential election, the differences between “red” and “blue” states were negligible. Both red and blue states had more institutions that saw decreases in international applications than increases, with 52 percent of institutions in red states and 53 percent in blue states seeing declines (see **Figure 14**).

However, there were some small differences. Thirty-one percent of institutions in blue states saw an increase in international student applications, whereas only 26 percent of institutions in red states saw an increase (see **Figure 14**). Fifty-four percent of institutions in red states saw a decrease in international enrollment, compared with 47 percent of institutions in blue states (see **Figure 14**).

Figure 14: Change in Applications and Enrollment by Red and Blue States



Note: Red states are those which Donald Trump won during the 2016 presidential election. Blue states are those which Hillary Clinton won. The District of Columbia (DC) is considered a blue state.

“ International students and their parents no longer feel safe choosing the U.S. as an avenue for tertiary education thanks to the unwelcoming rhetoric leaving the White House. U.S. college campuses are experiencing higher numbers of racist hate crimes than last year, and these are all fueled by fear.”

- Respondent from a private not-for-profit college

CAUSE AND EFFECT: THE ROLE OF U.S. POLITICS AND AN EVOLVING INTERNATIONAL ADMISSIONS PARADIGM

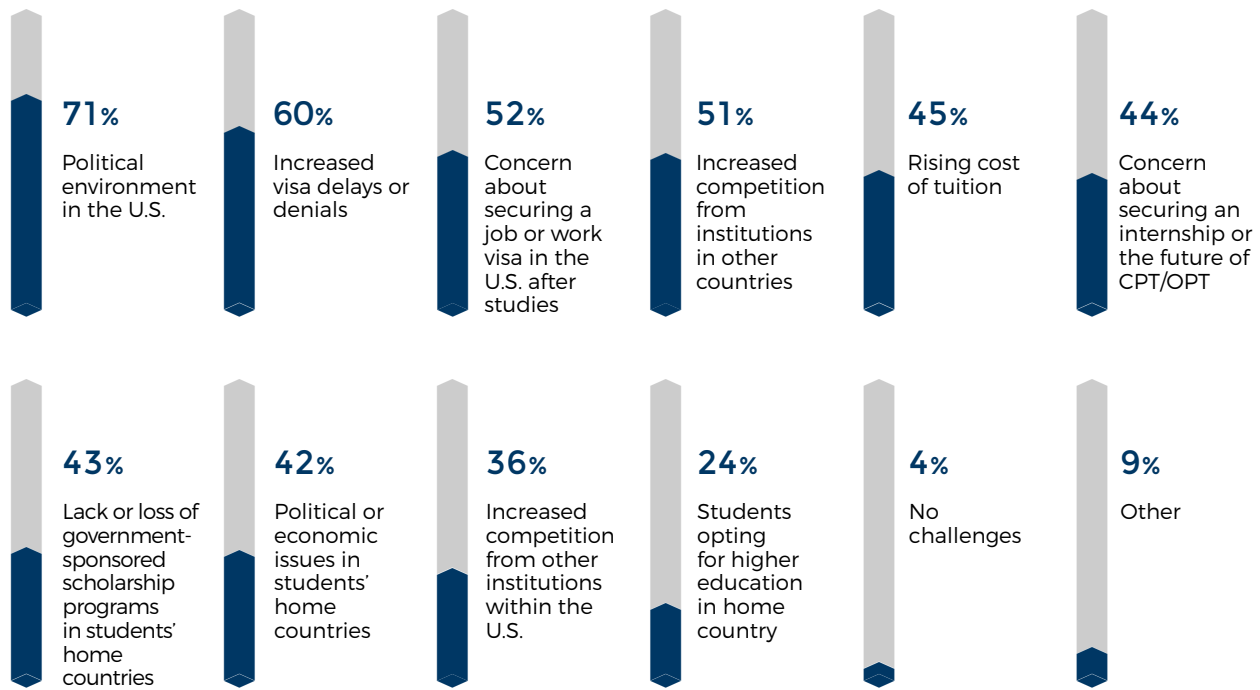
The vast majority of respondents to our survey pointed to one cause of HEIs' international recruitment challenges: the political environment in the U.S.

KEY FINDINGS

- According to our respondents, the biggest challenge to meeting enrollment targets was “Political environment in the U.S.,” with 71 percent of respondents choosing this option (see **Figure 15**).
- “Increased visa delays or denials” (60 percent) and “Concern about securing a job or work visa in the U.S. after studies” (52 percent) were the next most cited factors (see **Figure 15**).

Respondents were unequivocal in their view that the political climate in the U.S. has hindered their ability to meet international enrollment targets (see **Figure 15**). Fully 71 percent chose “Political environment in the U.S.” in answer to the question, “What are the biggest challenges to meeting enrollment targets?” The second and third most selected options (see **Figure 15**) were “Increased visa delays or denials” (60 percent), and “Concern about securing a job or work visa in the U.S. after studies” (52 percent). But since the orders to tighten restrictions on applying for and extending work visas originated in the federal government, these two options are also inextricably linked to the current political climate.

Figure 15: Factors that Negatively Affected Institutions' International Enrollment (n=139)



Q: Which, if any, of the following had a negative impact on your institution in terms of meeting international enrollment targets?

The fourth and fifth most cited challenges—“Increased competition from institutions in other countries” (51 percent) and “Rising cost of tuition” (45 percent)—add a layer of complexity to an already challenging recruitment environment (see **Figure 16**). Institutions must not only convince students that their campuses are safe, they must also communicate the return on investment of a U.S. higher education, writ large. While presidential administrations change every four to eight years, the more pressing, longer term challenge for U.S. institutions is international competition.

As more countries come to see the enormous value of educating international students, their offerings of high-quality and comparatively affordable English-taught degree programs are increasing at a staggering rate. Concomitantly, U.S. institutions have been slow to react to this developing affordability crisis. International student tuition and fees, often used as subsidies for domestic students, may be reaching an apotheosis in terms of financial viability.

“More students are going to Europe and Canada and Australia for English higher education. This is directly related to the uncertain political climate and gun/violence culture in the U.S.”

- International recruitment specialist at a public doctoral university

RECRUITMENT STRATEGIES: INTERNATIONAL HIGHER ED REACTS

U.S. institutions are reacting to the pressure of a rapidly evolving global recruitment landscape. Seventy-three percent of respondents have already altered or are planning to alter their international recruitment strategy because of declining international student interest. Notably, however, most institutions surveyed (80 percent) have not increased their budget for the 2018–19 application cycle. Instead, they are by and large doubling down on many international recruitment strategies, and allocating more resources to lower cost tactics (see **Figure 16**).

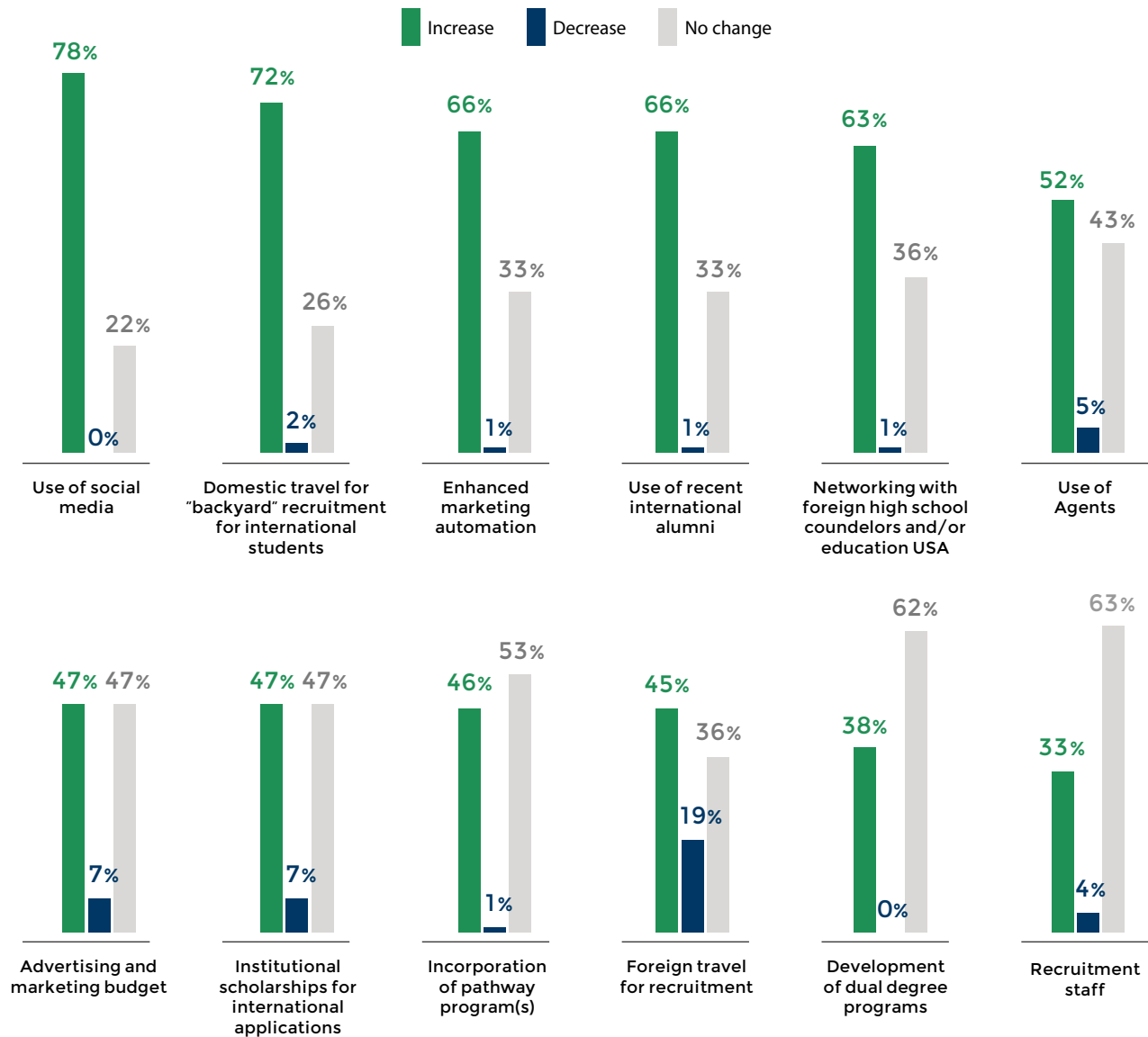
KEY FINDINGS

- Seventy-three percent of institutions have already altered or are planning to alter their international student recruitment strategy for the upcoming cycle.
- Twenty percent of institutions have increased their budget for international student recruitment for the upcoming cycle, while 26 percent have decreased their budget.
- The resources and strategies institutions intend to increase the most are “use of social media” (78 percent), and “domestic travel for ‘backyard’ recruitment for international students” (72 percent) (see **Figure 16**).
- Seventy-four percent of institutions plan to change their target countries or regions in response to declining interest; 26 percent do not (see **Figure 16**).
- Sixty percent of institutions plan to prioritize Latin America and the Caribbean; 51 percent plan to prioritize China; 44 percent, India; and 27 percent, the MENA region, where countries that showed some of the largest declines are located (see **Figure 17**).

Half of the survey respondents plan to increase their use of five different strategies, and one third plan to increase their use of all the strategies listed in the survey. The only strategy that a significant number of institutions plan to decrease is “Foreign travel for recruitment,” with 19 percent of institutions planning to decrease their travel, likely because of cost. (For all the strategies, see **Figure 16**.)

The resources and strategies that institutions intend to make the greatest use of are social media (78 percent) and “Domestic travel for ‘backyard’ recruitment for international students” (72 percent) (see **Figure 16**). Other popular strategies are “Enhanced marketing automation” (66 percent), increased “Use of recent international alumni” (66 percent), “Networking with foreign high school counselors and/or Education USA” (63 percent), and “Use of agents” (52 percent) (see **Figure 16**).

Figure 16: Plans to Change International Student Recruitment Strategy (n=95)

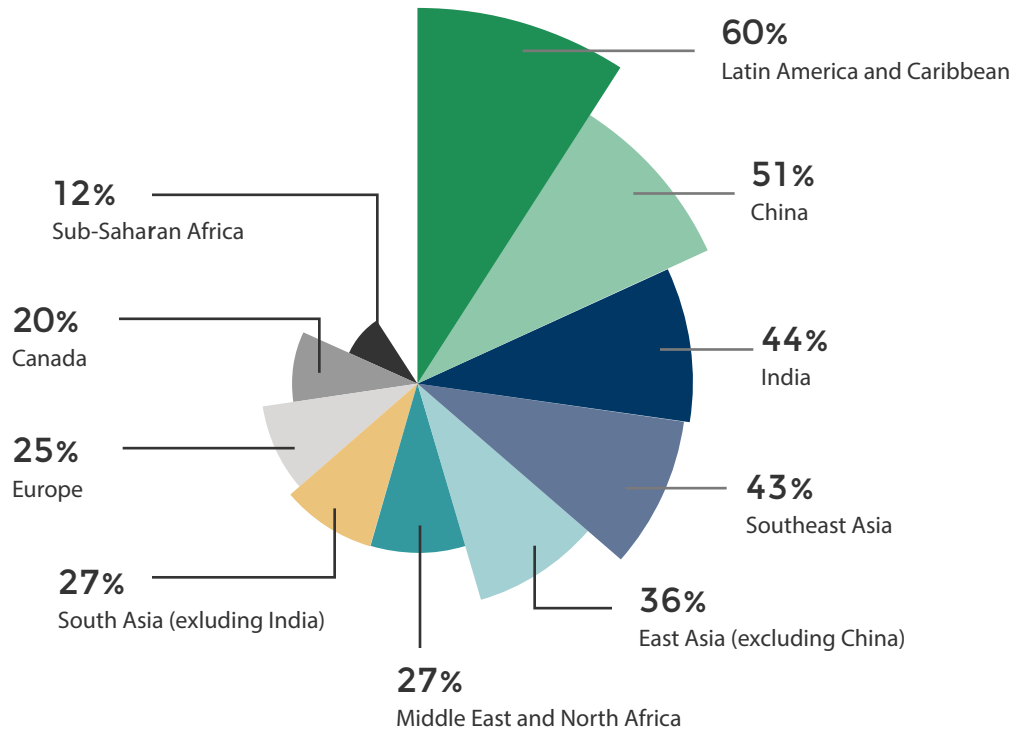


Q: How do you plan on reallocating or changing usage of the following institutional resources and recruitment strategies for the 2018-2019 application cycle?

Note: This question was only answered by those who answered "Yes" to "Has your institution altered your recruitment strategy?" "Not sure" responses removed from analysis. "A significant decrease" and "some decrease" combined." "A significant increase" and "some increase" combined.

Seventy-four percent of institutions surveyed also plan to change their target countries or regions for recruitment, with the greatest proportion (60 percent) planning to prioritize Latin America and the Caribbean (see **Figure 17**) followed by China and India. This adjustment may indicate that HEIs may be confident in their ability to maintain their numbers from these top source markets through additional recruitment efforts. However, a focus on Latin America and the Caribbean indicates that HEIs recognize the need to diversify to other source regions. As one respondent, a dean at a public doctoral university, stated, "We depend too heavily on one country for our enrollment, which makes us too vulnerable to shifts in enrollment patterns."

Figure 17: Countries and Regions to be Prioritized for International Student Recruitment (n=75)



Q: Which countries/regions will you prioritize for international student recruitment for the 2018-2019 academic year?

Note: This question was only answered by those who answered "Yes" to "Has your institution altered your recruitment strategy?" and by those who answered "Yes" to "Will you change some of your target countries/regions for recruitment?" Only 1% of respondents indicated Oceania as a priority.

SUPPORTING INTERNATIONAL STUDENTS DURING TURBULENT TIMES

While our research sought to understand the challenges of international recruitment in a difficult political landscape, effective recruitment does not occur in a vacuum. To recruit international students effectively in this climate, an institution must convey its ability to provide a supportive and high-quality educational experience. International students on campus and alumni can be essential to an HEI's international recruitment strategy, as well as the development of a sustainable pipeline.

Furthermore, U.S. institutions have an ethical imperative to create a welcoming space for the international students they recruit, especially at a time when students may feel particularly vulnerable or alienated. When asked which steps institutions are taking to allay the concerns of prospective international students, 56 percent of institutions reported providing updates to students about changes in U.S. immigration and visa policies and enforcement. Half issued a statement supporting international students, 31 percent created forums and open discussions for international students regarding U.S. political events, but 29 percent have not taken any additional action (see **Figure 18**).

Effects of the #YouAreWelcomeHere Campaign

The #YouAreWelcomeHere campaign was designed to affirm to international students that U.S. HEIs are still friendly, welcoming, and safe, regardless of what is portrayed in the media. The 335+ participating HEIs engage in conveying this message through photos, videos, events, and more.

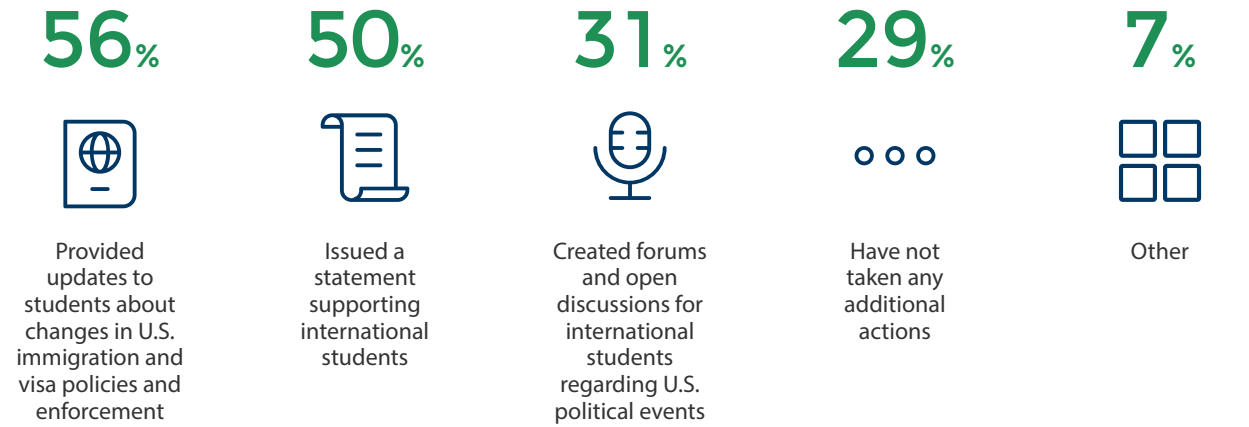
Forty-eight percent of institutions have participated in the #YouAreWelcomeHere campaign, whereas 52 percent have not. Of those that participated, the most common methods were using the #YouAreWelcomeHere hashtag across social media (63 percent) and creating a video emphasizing the #YouAreWelcomeHere message (63 percent). Other methods were adding information about #YouAreWelcomeHere to admissions brochures or to the university website (48 percent), hosting a #YouAreWelcomeHere campus event (23 percent), and creating and distributing #YouAreWelcomeHere branded products (19 percent). Six percent of respondents made other welcoming overtures, such as putting up posters and signs, and sending emails.

Of those who participated in the campaign, 86 percent found it effective, while 14 percent did not.

86% Found it effective



Figure 18: Steps Taken to Allay Concerns of Prospective International Students (n=139)



Q: What are some of the steps taken by you or your administration's office to allay the concerns of prospective international students?

ACTION STEPS FOR INSTITUTIONS

Despite the daunting international student recruitment landscape, there are still multiple strategies U.S. HEIs can employ. Broadly speaking, these approaches involve adapting international enrollment management strategies, providing a welcoming environment for international students, and communicating positive messaging.

Building on our research findings, we recommend that institutions take the following steps:

1. Diversify recruitment targets.

With the greatest enrollment declines representing fewer students from China and India, institutions need to double down on diversification efforts. Since international enrollment from any one country is prone to large fluctuations, diversifying the enrollment funnel is the best course of action.

Schools can diversify without abandoning their historically strong sending regions or their high admissions standards. Many respondents cautioned that “this is not a time to leave regions or countries that have produced prospects in the past or [to admit students] based on lower standards in order to retain strong enrollments.”

Institutions should therefore continue to recruit from China and India, but they should diversify within those countries, widening their targets to Tier II and Tier III cities. Such cities tend to have a smaller total population as well as a burgeoning middle class. Lower-ranked institutions often achieve more success in recruiting from such cities, where many students can afford to study internationally but may have a broader range of schools they would like to attend (Jennings, 2017).

2. Emphasize a welcoming environment.

Institutions need to cultivate a keen awareness of how prospective international students view the current political climate in the U.S., especially since this was the challenge survey respondents cited most. In fact, half of the institutions in our survey have issued a statement supporting international students. One respondent even said that “in communicating via email or text with students, we always start each email with, ‘you are welcome at our institution.’”

The #YouAreWelcomeHere campaign is one way multiple institutions have banded together to demonstrate solidarity and show support for international students; 86 percent of survey respondents found the campaign effective. For students already on campus, schools can hold forums to facilitate discussions about current politics in the U.S., which 31 percent of the institutions in our survey have done. Providing such discussion spaces or town hall meetings shows that institutions are aware of the needs of international students, and it allows students to connect with their peers (Skinner, 2018).

3. Provide support resources for international students.

HEIs need sufficient support resources for international students, who are in a particularly vulnerable state. Over a quarter of our respondents reported not taking any additional action to allay the concerns of prospective international students. At a time when these students are in need of support, some HEIs may just be at a loss for what resources they should provide and how they should provide them. Resources for international students can include up-to-date information about immigration and visa policies that may affect their education, a method used by 56 percent of institutions in our survey. Pre-arrival support can help international students navigate the visa process (see Skinner, 2018). Schools can also provide services to help international students through all the stages of the application process. Knowing that many families may be concerned about safety in the U.S., one respondent suggested “incorporating recruitment materials specifically for parents addressing the main safety concerns and highlighting all of the support services available for our international population, not just within our campus but the surrounding community as well.”

Institutions can also offer students meetings with both institutional and external professionals. One-on-one meetings with campus support offices can help gauge the specific challenges students are facing, allowing institutions to respond appropriately. Meanwhile, offering students the chance to consult with legal professionals can help them understand their specific visa situation. In addition, legal professionals can provide information on OPT (Optional Practical Training) and CPT (Curricular Practical Training), which could be a crucial support: Over half of our respondents cited international students’ concerns about securing a job or work visa in the U.S. as an enrollment challenge.

4. Engage in social media and virtual outreach.

Eighty percent of surveyed institutions have either not changed their budget for international student recruitment or decreased it. At the same time, alumni, current and prospective international students are increasingly using social media to engage in conversations about education abroad (Kono, 2012). As a result, social media and other virtual methods of interacting can be a cost-effective way of breaking into emerging markets, increasing outreach, and keeping students up-to-date. Social media can be used not only to build relationships with students, but also to inform them of developments in immigration and visa policy that may affect their student status. Seventy-eight

percent of survey respondents intend to increase their social media use and engage with prospective students through video chats, live Q&As, and mobile communication tools. One respondent's institution has used social media "to reinforce the importance of diversity and the value added by [the] presence of international students and scholars," a method many schools have used, as seen by the #YouAreWelcomeHere campaign.

Because social media feeds are readily available to all prospective students, HEIs must take care to actively engage with students, instead of only posting content. Responding thoughtfully to students' comments—both positive and negative—demonstrates a concern for students' needs (ICEF Monitor, 2018).

5. Involve the alumni network in recruitment.

Social media can be used for another purpose—to build a robust alumni network. Alumni can help attract prospective international students, and 66 percent of our respondents said they plan to engage more with recent international alumni for the upcoming application cycle. HEIs can establish an alumni ambassador program to represent their schools online through social media, allowing prospective students to ask questions, or even include their contact information in marketing collateral (ICEF Monitor, 2018). International alumni can act as spokespeople to spread information to potential students, in addition to reassuring students of the welcoming environment at their alma mater. Potential students also appreciate hearing the personal experiences of others from their home country. As one respondent noted, "we foresee that networking with alumni and creating stronger pathways will help us retain prospects from countries where enrollments are declining."

6. Address financial concerns.

Because funding is one of the largest concerns of international students (Schulmann, 2017), HEIs should seek to address potential students' financial concerns. Almost half of our respondents cited the rising cost of tuition as a challenge to recruiting international students. Although providing additional scholarships or lowering tuition most directly attracts financially sensitive international students, neither option is always possible. However, institutions can use other strategies to ease prospective students' financial concerns.

Schools should provide funding advice that can help international students understand and manage the complete costs of their education. They should also demonstrate the return on investment for degrees at their school in order to help international students understand why the high financial cost may be worth it (Le, 2017b). Sharing data about OPT/CPT opportunities and typical job earnings and prospects for graduates could also be useful. To induce more lower-budget students to apply, a recent WENR article (Schulmann, 2017) found that simply waiving application fees may be an effective strategy.



7. Develop and maintain partnerships.

Institutions can form partnerships with a wide range of organizations, including community colleges, pathway programs, agents, or government offices.

Establishing partnerships and articulation agreements with community colleges, for example, can create a cost-effective pipeline of international students who seek a four-year degree after community college (Loo, 2016). Furthermore, with over 80,000 international students studying in the U.S. at the secondary level (Farrugia, 2017), most of whom seek to enroll in a U.S. HEI after graduation, partnerships with high schools can be an effective method of backyard recruiting. In addition, pathway programs can provide access to a large body of students, and also offer assistance with marketing and recruitment efforts.

One respondent suggested maintaining a good connection with institutions' SEVP (Student and Exchange Visitor Program) representatives who can help with I-20 forms and other visa issues. Another institution plans to “establish new relationships and cultivate existing relationships with Washington-based embassies, ministries, and agencies to promote higher education in the U.S. with emphasis on study at our institution.”

CONCLUSION

With the vast majority of HEIs citing the current political environment in the U.S. as a key influence in international student enrollment declines, schools are feeling the acute and damaging effects: The majority of HEIs failed to meet their international enrollment goals, and applications have declined for the top-sending source countries. Over a third of institutions are pessimistic about their future international enrollment.

However, many more remain optimistic, and are prepared to alter their recruitment strategies to continue attracting international students. In light of the current political climate, schools should not only work to assure international students that they are welcome and provide them adequate resources, they should also diversify to a variety of source markets to avoid becoming overly reliant on any one country. If HEIs are able to provide a welcoming environment for international students and widen their recruitment efforts, they will be able to build a solid foundation and community for international students—regardless of future paradigm shifts.

NOTES ON METHODOLOGY

LIMITATIONS

The survey sample is restricted to individuals that subscribe to WES newsletters, have accessed our resources, or have had previous communication with WES. This may result in self-selection and sample biases.

APPENDIX: RESPONSES TO ALL SURVEY QUESTIONS

APPENDIX A. EMERGING STUDENT ENROLLMENT TRENDS

Total Responses	139
Did your institution meet its enrollment goals for international students for the 2017-18 academic year?	
Yes	38%
No	41%
Don't know/Not applicable	21%
Did your institution see a change in the total number of applications from international students from the 2016-17 application cycle to the 2017-18 application cycle?	
Increase	26%
Decrease	49%
No change	18%
Don't know/Not applicable	7%
By what percentage, approximately, did the total number of international student applications <i>increase</i> from the 2016-17 application cycle to the 2017-18 application cycle? (n=36)	
This question was only answered by those who answered "Increase" to "Did your institution see a change in the total number of applications from international students?"	
Less than 1%	0%
1% to 2%	22%
2.1% to 5%	28%
5.1% to 10%	22%
More than 10%	28%
By what percentage, approximately, did the total number of international student applications <i>decrease</i> from the 2016-17 application cycle to the 2017-18 application cycle? (n=68)	
This question was only answered by those who answered "Decrease" to "Did your institution see a change in the total number of applications from international students?"	
Less than 1%	4%
1% to 2%	15%
2.1% to 5%	21%
5.1% to 10%	16%
More than 10%	44%
Did your institution see a change in the number of enrolled international students from the 2016-17 academic year to the 2017-18 academic year?	
Increase	27%
Decrease	46%
No change	19%
Don't know/Not applicable	8%
By what percentage, approximately, did the total number of enrolled international students <i>increase</i> from the 2016-17 academic year to the 2017-18 academic year? (n=37)	
This question was only answered by those who answered "Increase" to "Did your institution see a change in the number of enrolled international students?"	
1% to 2%	24%
2.1% to 5%	24%
5.1% to 10%	27%
More than 10%	19%
By what percentage, approximately, did the total number of enrolled international students <i>decrease</i> from the 2016-17 academic year to the 2017-18 academic year? (n=64)	
This question was only answered by those who answered "Decrease" to "Did your institution see a change in the number of enrolled international students?"	
1% to 2%	19%
2.1% to 5%	23%
5.1% to 10%	30%
More than 10%	23%

Those who answered “No change” to “Did your institution see a change in the total number of applications from international students?” did not answer the following questions.

Total Responses	104
What change in applications from the following regions did you experience from the 2016-17 to the 2017-18 application cycle?	
China	
A significant decrease	16%
Some decrease	35%
No change	19%
Some increase	20%
A significant increase	4%
Not applicable	6%
India	
A significant decrease	22%
Some decrease	23%
No change	29%
Some increase	18%
A significant increase	3%
Not applicable	5%
Middle East and North Africa	
A significant decrease	18%
Some decrease	28%
No change	24%
Some increase	22%
A significant increase	0%
Not applicable	8%
Asia (excluding China and India)	
A significant decrease	8%
Some decrease	24%
No change	31%
Some increase	21%
A significant increase	7%
Not applicable	10%
Latin America and Caribbean	
A significant decrease	6%
Some decrease	16%
No change	45%
Some increase	24%
A significant increase	2%
Not applicable	7%
Sub-Saharan Africa	
A significant decrease	5%
Some decrease	16%
No change	43%
Some increase	16%
A significant increase	9%
Not applicable	11%
Europe	
A significant decrease	5%
Some decrease	10%
No change	58%
Some increase	14%
A significant increase	3%
Not applicable	11%
Oceania	
A significant decrease	1%
Some decrease	9%
No change	62%
Some increase	5%
A significant increase	0%
Not applicable	24%
Canada	
A significant decrease	4%
Some decrease	16%
No change	57%
Some increase	12%
A significant increase	2%
Not applicable	10%

Total Responses	104
For the following academic levels/programs, what change in international student applications did your institution experience from the 2016-17 application cycle to the 2017-18 application cycle?	
Undergraduate	
A significant decrease	18%
Some decrease	25%
No change	5%
Some increase	24%
A significant increase	10%
Not applicable	18%
Graduate	
A significant decrease	24%
Some decrease	23%
No change	10%
Some increase	13%
A significant increase	4%
Not applicable	27%
Intensive English	
A significant decrease	27%
Some decrease	11%
No change	9%
Some increase	5%
A significant increase	1%
Not applicable	48%
Bridge or Pathway Program	
A significant decrease	7%
Some decrease	8%
No change	13%
Some increase	1%
A significant increase	1%
Not applicable	71%
Non-Degree Programs (e.g., certificate programs, exchange programs)	
A significant decrease	5%
Some decrease	7%
No change	23%
Some increase	8%
A significant increase	2%
Not applicable	56%

Those who answered “No change” to “Did your institution see a change in the number of enrolled international students?” did not answer the following questions.

Total Responses	101
What change in enrollment from the following regions did you experience from the 2016-17 to the 2017-18 application cycle?	
China	
A significant decrease	12%
Some decrease	36%
No change	25%
Some increase	22%
A significant increase	3%
Not applicable	3%
India	
A significant decrease	19%
Some decrease	26%
No change	27%
Some increase	22%
A significant increase	4%
Not applicable	3%

Total Responses	101
What change in enrollment from the following regions did you experience from the 2016-17 to the 2017-18 application cycle?	
Middle East and North Africa	
A significant decrease	16%
Some decrease	29%
No change	32%
Some increase	14%
A significant increase	4%
Not applicable	6%
Asia (excluding China and India)	
A significant decrease	8%
Some decrease	23%
No change	39%
Some increase	23%
A significant increase	4%
Not applicable	4%
Latin America and Caribbean	
A significant decrease	5%
Some decrease	19%
No change	51%
Some increase	17%
A significant increase	3%
Not applicable	5%
Sub-Saharan Africa	
A significant decrease	2%
Some decrease	17%
No change	57%
Some increase	14%
A significant increase	1%
Not applicable	9%
Europe	
A significant decrease	2%
Some decrease	12%
No change	63%
Some increase	14%
A significant increase	2%
Not applicable	7%
Oceania	
A significant decrease	1%
Some decrease	11%
No change	62%
Some increase	4%
A significant increase	0%
Not applicable	22%
Canada	
A significant decrease	2%
Some decrease	17%
No change	58%
Some increase	12%
A significant increase	2%
Not applicable	9%
For the following academic levels/programs, what change in international student enrollment did your institution experience from the 2016-17 application cycle to the 2017-18 application cycle?	
Undergraduate	
A significant decrease	11%
Some decrease	34%
No change	6%
Some increase	24%
A significant increase	7%
Not applicable	19%
Graduate	
A significant decrease	21%
Some decrease	23%
No change	11%
Some increase	20%
A significant increase	2%
Not applicable	24%

Total Responses	101
For the following academic levels/programs, what change in international student enrollment did your institution experience from the 2016-17 application cycle to the 2017-18 application cycle?	
Intensive English	
A significant decrease	27%
Some decrease	13%
No change	10%
Some increase	6%
A significant increase	1%
Not applicable	44%
Bridge or Pathway Program	
A significant decrease	6%
Some decrease	8%
No change	11%
Some increase	3%
A significant increase	0%
Not applicable	72%
Non-Degree Programs (e.g., certificate programs, exchange programs)	
A significant decrease	2%
Some decrease	11%
No change	24%
Some increase	7%
A significant increase	2%
Not applicable	54%
Total Responses	139
What change in international <i>applications</i> do you anticipate for the upcoming 2018-19 academic year?	
A significant decrease	10%
Some decrease	34%
No change	17%
Some increase	34%
A significant increase	5%
What change in international <i>enrollment</i> do you anticipate for the upcoming 2018-19 academic year?	
A significant decrease	2%
Some decrease	11%
No change	24%
Some increase	7%
A significant increase	2%

NOTE:

1. Percentage may not sum up to 100% due to rounding.
2. Respondents who answer "Not applicable" and "Not sure/Don't know" are not included in the data analysis.

APPENDIX B. FACTORS AFFECTING INTERNATIONAL STUDENTS

Total Responses	139
Which, if any, of the following had a negative impact on your institution in terms of meeting international enrollment targets? (select all that apply)	
Increased visa delays or denials	60%
Rising cost of tuition	45%
Political environment in the U.S.	71%
Students opting for higher education in home country	24%
Increased competition from institutions in other countries	51%
Increased competition from other institutions within the U.S.	36%
Lack or loss of government-sponsored scholarship programs in students' home countries	43%
Concern about securing a job or work visa in the U.S. after studies	52%
Concern about securing an internship or the future of CPT/OPT	44%
Political or economic issues in students' home countries	42%
Other	9%
No challenges	4%
Has your campus participated in the #YouAreWelcomeHere campaign?	
Yes	37%
No	41%
Not sure	22%

Total Responses	139
In which of the following ways have you participated in the #YouAreWelcomeHere campaign? (n=52)	
This question was only answered by those who answered "Yes" to "Has your campus participated in the #YouAreWelcomeHere campaign?"	
Created a video emphasizing the #YouAreWelcomeHere message	28%
Hosted a #YouAreWelcomeHere campus event	10%
Added information about #YouAreWelcomeHere to admission material or to university website	22%
Created and distributed #YouAreWelcomeHere branded products	9%
Other	3%
How effective do you believe the #YouAreWelcomeHere campaign was on easing prospective international students' concerns about studying in the U.S.? (n=52)	
This question was only answered by those who answered "Yes" to "Has your campus participated in the #YouAreWelcomeHere campaign?"	
Not at all effective	13%
Somewhat effective	69%
Effective	10%
Very effective	4%
Not applicable/Prefer not to answer	4%

NOTE:

1. Percentage may not sum up to 100% due to rounding.
2. Respondents who answer "Not applicable" and "Not sure/Don't know" are not included in the data analysis.
3. For multiple selection questions, percentages may not sum up to 100%

APPENDIX C. RECRUITMENT STRATEGIES

Total Responses	139
To what extent is your institution optimistic or pessimistic about international enrollment from the following regions for the 2018- 2019 academic year?	
Overall	
Very pessimistic	4%
Somewhat pessimistic	31%
Neutral	24%
Somewhat optimistic	31%
Very optimistic	6%
Not applicable/Prefer not to say	4%
China	
Very pessimistic	5%
Somewhat pessimistic	17%
Neutral	30%
Somewhat optimistic	31%
Very optimistic	11%
Not applicable/Prefer not to say	6%
India	
Very pessimistic	6%
Somewhat pessimistic	21%
Neutral	30%
Somewhat optimistic	30%
Very optimistic	8%
Not applicable/Prefer not to say	6%
Middle East and North Africa	
Very pessimistic	9%
Somewhat pessimistic	24%
Neutral	32%
Somewhat optimistic	23%
Very optimistic	4%
Not applicable/Prefer not to say	7%
Asia (excluding China and India)	
Very pessimistic	4%
Somewhat pessimistic	18%
Neutral	32%
Somewhat optimistic	32%
Very optimistic	7%
Not applicable/Prefer not to say	6%
Latin America and Caribbean	
Very pessimistic	4%
Somewhat pessimistic	19%
Neutral	38%
Somewhat optimistic	25%
Very optimistic	6%
Not applicable/Prefer not to say	8%

Total Responses	139
To what extent is your institution optimistic or pessimistic about international enrollment from the following regions for the 2018- 2019 academic year?	
Sub-Saharan Africa	
Very pessimistic	3%
Somewhat pessimistic	23%
Neutral	50%
Somewhat optimistic	14%
Very optimistic	3%
Not applicable/Prefer not to say	7%
Europe	
Very pessimistic	5%
Somewhat pessimistic	13%
Neutral	53%
Somewhat optimistic	19%
Very optimistic	4%
Not applicable/Prefer not to say	7%
Oceania	
Very pessimistic	2%
Somewhat pessimistic	12%
Neutral	60%
Somewhat optimistic	10%
Very optimistic	1%
Not applicable/Prefer not to say	14%
Canada	
Very pessimistic	1%
Somewhat pessimistic	14%
Neutral	50%
Somewhat optimistic	18%
Very optimistic	7%
Not applicable/Prefer not to say	9%
Has your budget for international student recruitment changed for the 2018-2019 application cycle?	
Significantly decreased	9%
Decreased	14%
No change	50%
Increased	17%
Significantly increased	2%
Not sure	8%
Has your institution altered your recruitment strategy due to changing international student interest, or do you plan to?	
Yes, we have already altered our strategy	39%
Yes, we are developing an alternative strategy (or plan to soon)	34%
No	27%

The following questions were only answered by those who answered “Yes” to “Has your institution altered your recruitment strategy?”

Total Responses	101
Will you change some of your target countries/regions for recruitment in response to declining interest?	
Yes	74%
No	26%
Which countries/regions will you prioritize for international student recruitment for the 2018-2019 academic year? (n=75)	
This question was only answered by those who answered “Yes” to “Will you change some of your target countries/regions for recruitment?”	
China	51%
India	44%
Middle East and North Africa	27%
Southeast Asia	43%
East Asia (excluding China)	36%
South Asia (excluding India)	27%
Latin America and Caribbean	60%
Sub-Saharan Africa	12%
Europe	25%
Oceania	1%
Canada	20%
Not applicable	0%

Total Responses	101
How do you plan on reallocating or changing usage of the following institutional resources and recruitment strategies for the 2018-2019 application cycle?	
Use of agents	
Significantly decrease	1%
Decrease	3%
No change	37%
Increase	32%
Significantly increase	13%
Not sure	15%
Incorporation of pathway program(s)	
Significantly decrease	0%
Decrease	1%
No change	42%
Increase	28%
Significantly increase	8%
Not sure	22%
Advertising and marketing budget	
Significantly decrease	1%
Decrease	5%
No change	43%
Increase	34%
Significantly increase	9%
Not sure	9%
Foreign travel for recruitment	
Significantly decrease	7%
Decrease	11%
No change	34%
Increase	33%
Significantly increase	10%
Not sure	6%
Domestic travel for "backyard" recruitment for international students	
Significantly decrease	0%
Decrease	2%
No change	22%
Increase	46%
Significantly increase	16%
Not sure	15%
Development of dual degree programs	
Significantly decrease	0%
Decrease	0%
No change	49%
Increase	23%
Significantly increase	7%
Not sure	22%
Use of social media	
Significantly decrease	0%
Decrease	0%
No change	21%
Increase	45%
Significantly increase	29%
Not sure	6%
Institutional scholarships for international applicants	
Significantly decrease	2%
Decrease	4%
No change	42%
Increase	32%
Significantly increase	10%
Not sure	11%
Enhanced marketing automation	
Significantly decrease	0%
Decrease	1%
No change	29%
Increase	43%
Significantly increase	16%
Not sure	12%

Total Responses	101
How do you plan on reallocating or changing usage of the following institutional resources and recruitment strategies for the 2018-2019 application cycle?	
Recruitment staff	
Significantly decrease	2%
Decrease	2%
No change	59%
Increase	28%
Significantly increase	3%
Not sure	6%
Use of recent international alumni	
Significantly decrease	0%
Decrease	1%
No change	30%
Increase	46%
Significantly increase	14%
Not sure	10%
Networking with foreign high school counselors and/or Education USA	
Significantly decrease	0%
Decrease	1%
No change	33%
Increase	48%
Significantly increase	10%
Not sure	9%
What are some of the steps taken by you or your admissions office to allay the concerns of prospective international students?	
Provided updates to students about changes in U.S. immigration and visa policies and enforcement	56%
Issued a statement supporting international students	50%
Created forums and open discussions for international students regarding U.S. political events	31%
Have not taken any additional actions	29%
Other	7%

NOTE:

1. Percentage may not sum up to 100% due to rounding.
2. Respondents who answer "Not applicable" and "Not sure/Don't know" are not included in the data analysis.
3. For multiple selection questions, percentages may not sum up to 100%

APPENDIX D. PROFILE QUESTIONS

Total Responses	139
What is your primary area of responsibility?	
International credential evaluation	11%
International admissions, marketing, or recruitment	63%
International institutional linkages/partnerships	4%
International student and/or scholar services	4%
Not applicable	4%
Other (please specify):	15%
How many years of experience do you have working in higher education?	
Less than 3 years	8%
3-5 years	21%
6-10 years	23%
More than 10 years	48%
Please indicate the academic level(s) with which you currently work.	
Associate's level	9%
Bachelor's level	31%
Master's level	32%
Doctoral level	18%
Intensive English	10%
Choose the category that best fits your current role, regardless of academic level.	
Senior or Executive Officer	7%
Academic Dean or Asst./Assoc. Dean	3%
Administrative Dean or Director/Registrar	12%
Faculty, Researcher, Teacher (non-admin)	0%
Director (Associate/Assistant)	38%
Manager/Coordinator/Counselor/Adviser	31%
Other (please specify):	9%

Total Responses	139
What is the scope of responsibility for your office or department?	
The entire institution	73%
One or more schools or colleges within your institution, but not all (e.g., law school, college of arts and sciences)	17%
One or more academic departments	5%
Intensive English or pathway program	1%
Other	4%
What is the total student enrollment at your institution? (n=138)*	
Less than 3,000	22%
3,000 to 9,999	34%
10,000 to 19,999	22%
20,000 to 30,000	12%
More than 30,000	9%
Approximately what proportion of the total student enrollment at your institution is international? (n=138)*	
Less than 1%	8%
1% to 2%	11%
2.1% to 5%	27%
5.1% to 10%	30%
10.1% to 20%	19%
More than 20%	6%

NOTE:

1. Percentage may not sum up to 100% due to rounding.
 2. Respondents who answer "Not applicable" and "Not sure/Don't know" are not included in the data analysis.
- *n=138 instead of 139 because of one anonymous respondent

ENDNOTES

1. The drop in Chinese visas could be attributed to the change in the visa term. Because visas are now valid for five years instead of one, fewer Chinese students would need to renew their visas without there necessarily being fewer Chinese international students in the U.S.
2. To help readers keep the discussion of applications and enrollments distinct, we're italicizing those words here.
3. For a good discussion of advising students regarding the various travel bans issued by the Trump Administration, see Skinner, 2018.

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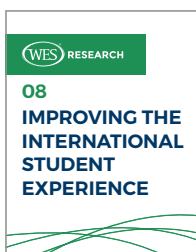
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