

ON INTERNATIONAL STUDENT ENROLLMENT

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Introduction

The Fall 2022 Snapshot on International Student Enrollment includes the findings from a survey of 638 U.S. higher education institutions on current patterns in international student enrollment as of fall 2022. The report focuses on international students studying at U.S. higher education institutions in person or online (in the United States or from abroad). The report, conducted by the Institute of International Education (IIE) and nine partner higher education associations, complements the Open Doors® Report on International Educational Exchange, which IIE conducts in partnership with the U.S. Department of State and provides a comprehensive view of international students from the previous year (IIE, 2022).

Key Findings

The Fall 2022 Snapshot reflects the continued rebound of international student mobility at U.S. colleges and universities amid the COVID-19 pandemic.

International student numbers at U.S. colleges and universities continue to rise:

- The total number of international students (all enrolled and Optional Practical Training [OPT]) has increased by nine percent as of fall 2022. This represents continued growth from the four percent noted in 2021/22 (IIE, 2022).
- International student growth is noted across all academic levels, with continued strong growth at the graduate level.
- The number of international students pursuing employment opportunities following their academic studies on OPT has increased by six percent. This is likely driven by the surge in the number of graduate students reported in *Open Doors* 2022, many of whom may be availing themselves of the opportunity to gain work experience in the United States.

New enrollments of international students at U.S. colleges and universities are up:

- Higher education institutions report a seven percent increase in the number of new international students enrolling for the first time at a U.S. institution, a continued increase following the 80 percent rebound in new enrollments in 2021/22 (IIE, 2022).
- Sixty-three percent of institutions report an increase in new international student enrollment, 12 percent indicate the number to be the same as last year, and 24 percent report a decrease.

U.S. higher education institutions are committed to international students studying in person:

- Ninety-nine percent of responding institutions are holding in-person classes or implementing a hybrid model. Less than one percent of institutions cite offering only online classes in fall 2022.
- Ninety-four percent of the reported international students are in the United States on campus.

International student outreach and recruitment is a priority:

- U.S. institutions note prioritizing international student outreach in India, Vietnam, Brazil, and China as well as international students at U.S. high schools.
- For outreach and recruitment to prospective international students, responding institutions report leveraging current international students (64 percent), online recruitment events (53 percent), and international partnerships (53 percent).
- Eighty-seven percent of reporting institutions indicate that financial support for their international student recruitment efforts is the same or higher than in the previous year.

Methodology

Survey Background and Data Collection

Ten partnering higher education associations distributed the *Fall 2022 Snapshot on International Student Enrollment* to their member institutions across the United States from September 22 to October 13, 2022. IIE carries out the survey in cooperation with American Association of Collegiate Registrars and Admissions Officers, American Association of State Colleges and Universities, American Council on Education, Association of Public and Land-grant Universities, College Board, Community Colleges for International Development, Council of Graduate Schools, National Association for College Admission Counseling, and NAFSA: Association of International Educators.

The survey captures 638 valid responses from higher education institutions. The *Fall 2022 Snapshot* respondents represent a subset of the almost 3,000 U.S. higher education institutions surveyed annually as part of the *Open Doors* International Student Census. The reporting institutions represent 52 percent of all international students in the *Open Doors Report on International Educational Exchange* (IIE, 2022).

Respondent Profile

Respondents to the *Fall 2022 Snapshot* reflect a broad range of institutional types and locations from 49 states, one U.S. territory, and Washington, D.C. Overall, the *Fall 2022 Snapshot* respondents' profile closely mirrors the profile of the institutions that completed the *Open Doors* 2022 International Student Census. Similar proportions are noted among geographic regions, institutional sectors, types, and sizes.

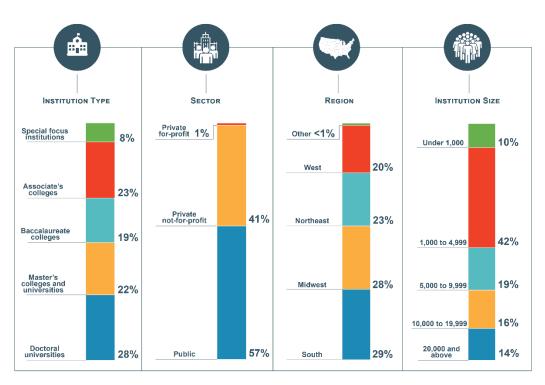


Figure 1: Fall 2022 Snapshot Institutional Representation

Note: Percentages may not sum to 100% due to rounding.

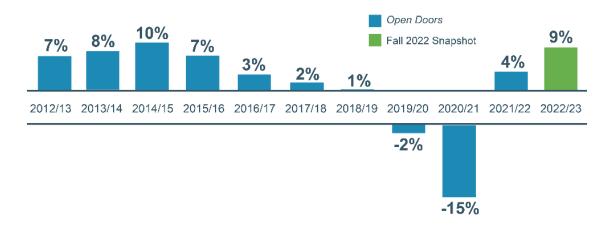
International Students at U.S. Colleges and Universities in Fall 2022

The findings of the *Fall 2022 Snapshot* highlight the continued resilience of international educational exchange. With the outbreak of the COVID-19 pandemic two years ago, our findings indicate a sustained rebound of student mobility to the United States.

Total International Student Enrollments at U.S. Higher Education Institutions

In fall 2022, reporting institutions indicate a nine percent increase in total international students. This includes students studying at U.S. colleges and universities in person and online and those on Optional Practical Training (OPT). This is the second year that international student mobility has increased after two years of decline, and growth was noted across all institutional types including doctoral universities, master's colleges and universities, baccalaureate colleges, special focus institutions, and community colleges.





Most reporting institutions have returned to predominantly in-person modes of study, either hybrid instruction (69%) or in-person learning only (31%). Just one of the 638 participating colleges and universities indicated that its mode of study is online only in fall 2022 (0.2%).

We have seen a considerable shift in the mode of study in the past two years given the COVID-19 pandemic. In the fall of 2020, 88 percent of institutions reported hybrid learning, and only two percent indicated that their instruction was in person (Baer & Martel, 2020). Two years later, the number of institutions that offer hybrid learning has decreased, though it is still well above half. However, the percentage of institutions that offer only in-person instruction has increased significantly to 31 percent.

Ninety-four percent of the international students reported in fall 2022 are studying in person on U.S. campuses. Throughout the COVID-19 pandemic, U.S. colleges and universities made extensive efforts to continue instruction amid health concerns and prioritized returning to in-person learning as quickly as possible. In *Open Doors 2021*, IIE reported that less than half of the international students studying at U.S. colleges and universities took in-person classes in the United States (Martel et al., 2021). In *Open Doors* 2022, this proportion of international students on U.S. campuses increased significantly to 90 percent (IIE, 2022). This trend continues to be noted in the *Fall 2022 Snapshot*, with 94 percent of institutions indicating that

international students are in the United States and pursuing their studies in person. While institutions note that online study is an option for international students who cannot travel due to COVID-19 restrictions, the number of students in this circumstance has decreased significantly over time.

Figure 3: Location of International Students by Year, 2020 – 2022

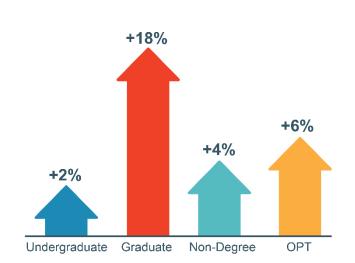


There is also an indication that more international students are beginning their studies rather than deferring. In fall 2020, U.S. colleges and universities reported that over 47,000 international students had deferred their study to a future semester or year, in large part due to the COVID-19 pandemic (Martel et al., 2020). This number fell to approximately 16,000 international students in fall 2021 and has now declined to nearly 12,000 in fall 2022 (Martel, 2021). This number is approaching the level of student deferrals reported prior to the pandemic in the fall of 2019 (approximately 9,000) (Martel et al., 2020).

International Students by Academic Level

In fall 2022, reporting institutions indicate an increase in international students across all academic levels: undergraduate, graduate, non-degree, and OPT. A comparison to *Open Doors* data indicates that the last time that all four academic levels increased was the 2014/15 academic year (IIE, 2022). Following the decreases experienced due to the COVID-19 pandemic, students studying at all levels and on OPT this fall are in greater numbers than the previous year.

Figure 4: Changes in International Student Totals by Academic Level, Fall 2022



International Enrollments. Enrolled international students include those pursuing undergraduate, graduate, or non-degree study, a subset of total international students. According to the *Fall 2022 Snapshot*, the total number of enrolled international students increased by 10 percent.

Undergraduate student numbers have rebounded by two percent after four years of declines. According to *Open Doors*, the height of undergraduate enrollments was in 2017/18, when 442,746 international students studied at U.S. colleges and universities (IIE, 2022). Since then, the number of undergraduate students fell and was impacted significantly by the

COVID-19 pandemic as international students likely deferred, postponed their undergraduate studies, or decided to forego studying outside their home country altogether. In the 2021/22 academic year, *Open Doors* reported that while undergraduate enrollments continued to decline, first-year enrollment increased by 20 percent (IIE, 2022). As more incoming undergraduate students are included in fall 2022, we note institutions reporting an overall increase in undergraduate students.

Graduate student enrollments continue to increase significantly by 18 percent. This growth builds on the 17 percent increase already reported in the 2021/22 academic year in *Open Doors* (IIE, 2022). Last year, graduate students surpassed undergraduate students for the first time in a decade, reaching a high of 385,097 students. This year's reported increase, though a subset of the full *Open Doors* reporting sample, points to a potential all-time high of graduate students in the United States in the 2022/23 academic year.

Finally, the total number of international students pursuing non-degree study, which includes short-term exchanges and intensive English programs, also increased by four percent. There was a significant decline in non-degree study amid the height of the COVID-19 pandemic (-64%) due to many students not pursuing shorter-term exchange programs (Martel et al., 2021). Then, in the 2021/22 academic year, non-degree totals rebounded by 61 percent (IIE, 2022). Reporting institutions indicate that non-degree enrollments in fall 2022 continue to grow at four percent, building on the positive turnaround from last year.

Optional Practical Training. The number of international students on OPT pursuing employment opportunities following their academic studies has increased by six percent, following two years of declines.

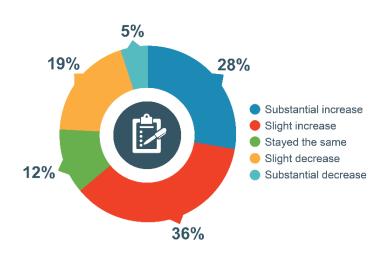
Following the 2016 OPT extension, which allowed international students pursuing degrees in science, technology, engineering, and math (STEM) to extend their stay in the United States from 17 to 24 months, the number of OPT students in the last decade increased sharply to more than 223,000 in 2018/19 (IIE, 2022). The total then leveled off at higher levels in 2019/20. The declines in 2020/21 and 2021/22 were exacerbated by the COVID-19 pandemic, when international students may have chosen to return home rather than pursue OPT, and smaller numbers of international students were entering the system, decreasing the overall pool eligible for OPT.

This fall, the rebound in OPT may be in part to the greater number of graduate students in the United States eligible to pursue OPT. Last year, the number of master's students in the United States increased by 29 percent (IIE, 2022). As graduate programs vary in length, these graduate students, 62 percent of whom study in STEM fields, will be eligible for OPT opportunities and likely influence the overall OPT numbers.

New International Student Enrollments

U.S. institutions that report to the *Fall 2022 Snapshot* continue to indicate a positive trend in new enrollments of international students who are studying at their institution for the first time. For the 2021/22 academic year, *Open Doors* reported a significant 80 percent rebound in new international student enrollments (IIE, 2022). These increases were evident across all academic levels. This fall (2022), institutions continue to signal a seven percent increase in new international student enrollments. Approximately 63 percent of reporting institutions indicate that their new international enrollments are slightly or substantially higher than the previous year. This increase is noted across all institutional types, with the majority of doctoral universities (68%), master's colleges and universities (62%), liberal arts colleges (62%), and community colleges (68%) reporting growth.

Figure 5: Changes in New International Student Enrollments, Fall 2022



The top factor colleges and universities cited for growth in 2022 is a continued rebound from the declines that many institutions faced amid the height of the COVID-19 pandemic (60%). As institutions recover from the effects of the COVID-19 pandemic, many colleges and universities recognize how investments in recruitment have resulted in new enrollment growth. Active recruitment efforts (54%), active outreach to admitted students (49%), and growing reputation and visibility of their institution (36%) were among the leading factors that institutions

attribute to increased new enrollment. Notably, this aligns with trends reported in the fall of 2019, prior to the pandemic (Sanger & Baer, 2019). Institutions also cite factors such as increased partnerships with agents (31%), improved support for enrolled students (26%), growth in institutional scholarship opportunities (22%), and the elimination of standardized test requirements (17%).

Among institutions experiencing declines, 87 percent note that multiple factors impact the decrease in new enrollment. Among the leading factors colleges and universities cite are visa application process challenges (73%), the cost of U.S. higher education (53%), and student decisions to stay home and enroll in their own country's higher education institutions (41%). Much smaller proportion of institutions note declines due to institutional factors, such as lack of sufficient staff for recruitment and admission of international students (28%), lack of sufficient funding for recruitment and admission of international students (26%), and shifting institutional priorities away from international student recruitment (15%).

Notably, many of the factors affecting new enrollment decreases specifically related to COVID-19 have sharply declined over the past two years. From fall 2020 to fall 2022, the proportion of institutions reporting new enrollment declines due to visa application issues associated with COVID-19 fell from 92 percent to 43 percent, concerns about physical safety related to COVID-19 declined from 78 percent to 21 percent, and those citing U.S. travel restrictions fell from 78 percent to 17 percent.

In addition, when collecting data on overall new enrollment patterns in the *Fall 2022 Snapshot*, U.S. institutions report on increases in new enrollments for the top places of origin. This provides insight into whether the number of students from these top places of origin will increase in the 2022/23 academic year. A higher proportion of colleges and universities indicate increases in international students from India, Japan, Bangladesh, Nigeria, and South Korea. Conversely, fewer institutions report increases in new enrollments from Saudi Arabia, China, and Taiwan.

Figure 6: Proportion of Institutions Reporting Increases in New Enrollments by Place of Origin, Fall 2021 – Fall 2022

Bangladesh	46%	Nepal	42%
Brazil	38%	Nigeria	46%
Canada	37%	Saudi Arabia	21%
China	29%	South Korea	46%
India	56%	Taiwan	32%
Iran	42%	UK	35%
Japan	52%	Vietnam	40%
Mexico	36%		

A positive trend among the top places of origin is that U.S. institutions attract a diverse pool of students from around the world. As *Open Doors* indicates, international students in the United States came from 219 places of origin in the 2021/22 academic year (IIE, 2022). Diversity of students and perspectives enrich U.S. campuses. The *Fall 2022 Snapshot* indicates we will continue to see steady flows of international students from Asia, Europe, Latin America, the Middle East, and Africa in the United States.

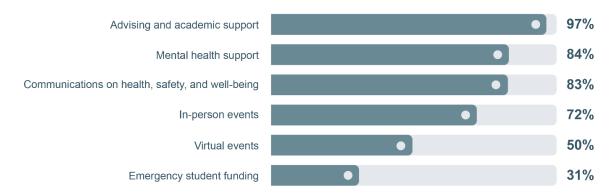
Support to International Students on U.S. Campuses in Fall 2022

In fall 2022, most COVID-19 health and safety precautions remain in place, but at much lower rates than in previous years. For example, throughout the past two years, we have seen a change in the mask-wearing requirements on campus. In fall 2020, 96 percent of institutions required face coverings for all on campus, followed by 87 percent in fall 2021 (Baer & Martel, 2020; Martel, 2021). This fall, only 22 percent of institutions report requiring face coverings on campus. A similar pattern emerges regarding COVID-19 vaccinations. In fall 2021, 72 percent of institutions made COVID-19 vaccines available to all students, faculty, and staff (Martel, 2021). Less than half (46%) indicate that vaccinations are provided this fall.

Finally, colleges and universities continue lifting restrictions on campus activities and travel. Only four percent of institutions report restricting activities and events on campus, while only three percent continue to restrict student and faculty travel. This is drastically different from two years ago, when 98 percent of institutions restricted on-campus events and 84 percent restricted travel (Baer & Martel, 2020). These differences point to institutions' priorities to return many activities on campus, focusing on health and safety.

Throughout the COVID-19 pandemic, we have asked reporting institutions about the support they provide to international students. Ninety-seven percent of institutions report providing advising and academic support to international students, and 84 percent indicate providing mental health support. There is a continued focus on health, safety, and well-being as 83 percent of institutions report providing this support. As our *Spring 2022 Snapshot* indicated, U.S. colleges and universities are also aware that external factors in student's home countries may impact students lives, and many institutions note providing support to students from areas of conflict, such as those from Ukraine or Russia (Martel & Baer, 2022).

Figure 7: International Student Support, Fall 2022



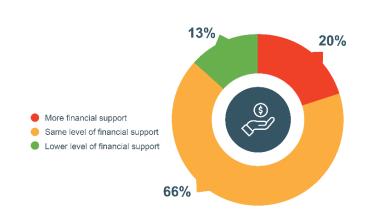
This year's *Fall 2022 Snapshot* added a question specifically asking about resources related to mental health. Institutions report that they predominantly offer access to licensed mental health professionals (91%), a health insurance plan (84%), and leaves of absence for physical or mental health reasons as the support they provide to international students. Mental health continues to be one of the primary concerns of advisors at the college and university level as students grapple with the realities of the COVID-19 pandemic and other pressures and conflicts in their lives. For example, an institution noted that it provides a "support group, specialized for international students, guided by a licensed counselor with intercultural training, that meets twice a month in a hybrid format." Institutions note that their approach is to provide a holistic set of services to their students, acknowledging that a diverse strategy is the best way to provide support sensitively.

Looking to Next Year's Recruitment Cycle

U.S. institutions looking ahead to future semesters remain engaged to attract international students from across the world to their campuses. This section outlines the various strategies that U.S. higher education institutions use to recruit international students to the United States.

Financial Commitment to International Student Outreach and Recruitment

Figure 8: Financial Support for Outreach and Recruitment, Fall 2022



U.S. institutions continue to invest resources in international student outreach and recruitment. The vast majority of colleges and universities (87%) report that financial support for student recruitment efforts is the same or higher than in the previous year. This represents an increase over the past two years when approximately 77 percent reported either an increase or stable level of financial support in fall 2021 and 64 percent in fall 2020 (Baer & Martel, 2020; Martel 2021). This high level of engagement is noted

across all responding institutional types, from large research institutions (90%) to community colleges (82%). This sustained financial commitment helps many U.S. colleges and universities provide resources and support services for prospective international students, retain staff, and conduct outreach initiatives to attract international students.

Institutions Prioritize Overseas Outreach to Asia

Reporting institutions continue to conduct outreach and recruitment to students worldwide, but many colleges and universities note focusing on specific recruitment markets each year. In fall 2022, institutions continue their focus on places of origin in Asia, including India (58%), Vietnam (43%), China (32%), and South Korea (29%). According to *Open Doors* data, international students from Asia comprised 69 percent of all international students in 2021/22, and many institutions continue to recruit a significant number of students from the region (IIE, 2022). This is the second consecutive year that colleges and universities note India as the leading recruitment destination, which is likely contributing to the strong growth in the number of Indian students reported in *Open Doors* (+19%). Although places of origin in Asia continue to be the national recruitment area of focus, U.S. colleges and universities also reported prioritizing outreach to over 65 other locations worldwide. As institutions plan for recruitment in the fall of 2022, colleges and universities can visit embassy or consulate websites for up-to-date information on the operating status and services offered.

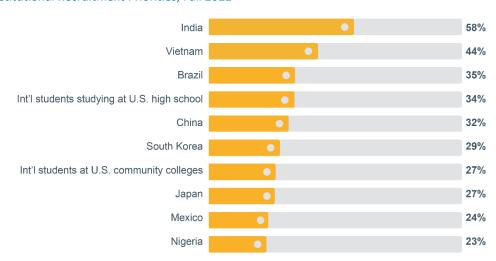


Figure 9: Institutional Recruitment Priorities, Fall 2022

Institutions Leverage Multiple Sources to Recruit International Students

To better analyze the recruitment of international students both in the United States and globally, the *Fall 2022 Snapshot* also collects data about the resources that U.S. higher education institutions leverage to recruit international students.

Figure 10: Resources Leveraged for International Recruitment, Fall 2022



Of institutions actively recruiting international students, 64 percent report proactively working with current international students for recruitment efforts. Current international students can often provide personal, authentic testimonials about how international students can succeed on their campus and in the United States.

Amid the height of the COVID-19 pandemic, many institutions nimbly expanded their online recruitment offerings and connected with students they may not have otherwise been able to reach (Baer & Martel, 2020). Drawing upon these lessons learned, many colleges and universities have institutionalized these best practices, with 53 percent leveraging online recruitment events

to reach prospective international students and 37 percent providing virtual campus visits.

Institutions also cite U.S. government resources as popular recruitment resources, with half (50%) of colleges and universities leveraging <u>EducationUSA</u>. EducationUSA is a U.S. Department of State network that promotes U.S. higher education to students worldwide by offering accurate, comprehensive, and current information about opportunities to study at accredited postsecondary institutions in the United States (U.S. Department of State, 2022). In addition, EducationUSA provides services to the U.S. higher education community to help institutional leaders meet recruitment and campus internationalization goals by offering resources such as the <u>Global Guide</u>, student mobility fact sheets, recruitment fairs, and a network of more than 400 international student advising centers in more than 175 countries and territories.

The <u>U.S. Commercial Service</u> at the U.S. Department of Commerce has education and training services industry specialists who provide resources on the global competitiveness of the U.S. education industry, expanding market access, and recommendations on digital strategies for outreach to different markets (International Trade Administration, 2022a). They also convene the <u>Study State Consortia</u>, which bring institutions within a state together to promote that state as a study destination for international students (International Trade Administration, 2022b). In line with this, the U.S. Commercial Service launched the USA: A Study Destination initiative to boost U.S. education exports by promoting the United States as a premier destination for international students. The initiative supports the state consortia and provides them with additional resources to recruit international students in line with their economic strategies.

With over 80 percent of college-age students using social media, many colleges and universities continue to engage international students through social media (50%) (Pew Research Center, 2021). U.S. colleges and universities run their own social media campaigns that showcase campus life, provide virtual tours, and give

insights into the achievements of students, faculty, and alumni. As institutions work to leverage social media effectively and authentically across platforms and languages, recent industry conferences, such as the NAFSA Conference and the EducationUSA Forum, have dedicated sessions to help international education professionals better utilize these platforms.

In addition, the <u>#YouAreWelcomeHere</u> campaign, advanced nationally by Temple University, has continued to grow, with more than 400 higher education institutions and organizations using this hashtag to promote that all international students are welcome to study in the United States (#YouAreWelcomeHere, 2022). Building upon the success of the social media campaign, more than 50 colleges and universities have committed to providing scholarships to international students through the #YouAreWelcomeHere national scholarship program.

While an online presence is increasingly important, many students and parents may still value one-on-one, in-person connections. Nearly half of the reporting institutions cite using agents (49%), and an increasing number of higher education institutions are attending in-person recruitment events (46%) as travel restrictions ease.

Conclusion

The findings from the *Fall 2022 Snapshot* reflect the resilience of the U.S. higher education system and provide an understanding of the current state of U.S. higher education institutions' commitment to international student mobility. With increases noted across all academic levels, the findings point to a continued rebound of international student totals in the 2022/23 academic year, with the full picture of the 2022/23 academic year available in November 2023 with the release of *Open Doors* 2023. Many institutions recognize the benefits of having international students in their diverse student body, with international students contributing approximately \$32 billion to the U.S. economy as of 2021 (U.S. Department of Commerce, 2022). U.S. institutions also value the diverse perspectives and cultures international students bring to the classroom, enriching academic discussions and enhancing all students' understanding of the world.

The findings of the *Fall 2022 Snapshot* indicate several areas of focus as U.S. colleges and universities look to future academic semesters and their international student trends.

- Rebounds are evident across all academic levels. The findings of the Fall 2022 Snapshot confirm that across the board, international students are pursuing study in the United States at higher levels than in the previous academic year. This is the first time all academic levels have grown since 2014/15, which points to rebounds following the height of the COVID-19 pandemic. This is encouraging and provides evidence regarding the desire of international students to pursue study at U.S. institutions across different academic levels. This rebound further indicates that international students are pursuing study at a wide array of institutional types that offer excellent educational opportunities across all academic levels, from baccalaureate and associate's colleges to master's colleges and universities and doctoral institutions.
- International student trends indicate diversity among leading places of origin. International student numbers are rebounding not only across all academic levels, but also among students from diverse leading places of origin. The findings of the *Fall 2022 Snapshot* indicate a large proportion of institutions reporting increases in new enrollments from Japan, India, Nigeria, and Vietnam. It is

- encouraging to see continued strong potential growth among students from India, which will likely continue to affect the leading places of origin of international students in the coming year.
- Institutions remain committed to internationalization. Our findings confirm that U.S. institutions are committed to internationalization and that almost 90 percent of institutions have committed financial resources to keep international efforts a priority. Despite the COVID-19 pandemic, our findings indicate a continued commitment to international student mobility. It is notable that institutions that experienced a decline in enrollments primarily focused on issues related to visa issues, cost, and COVID-19. However, very few institutions reported that these decreases were due to a lower focus on internationalization on their campus. This speaks to the field's continued commitment to welcoming international students.

As we look ahead to the coming academic year, we note that the trends will continue to evolve regarding international student numbers. We continue to see travel restrictions lifting and programs that had been paused restarting. The fall 2022 semester provides a critical perspective on the latest updates and will help researchers and practitioners map this important time and its effects on the international education field.

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