International Student Mobility Flows and COVID-19 Realities

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Foreword

As I stood in downtown Denver ringing in the New Year, the fireworks lit up the sky with an optimism for the start of this new decade. 20-20 vision surely was a misnomer. A year and a half later, we are at a pivotal point as the world aspires to untangle itself from the travesty of the pandemic. It has adversely impacted every human, institution, government, and entity, and it comes as no surprise that global mobility has taken a significant setback. The revenue reliant and mobility incentivized model of international education was unsustainable and unjust. The successful emergence from the pandemic for global mobility will be defined by our re-envisioning and transformation of global educational systems. It requires a coordinated approach that emphasizes the intention, importance, and integration of global engagement with the right compass. The need of the hour is an overhaul of redundant systems with innovative new-age technology, responsive pedagogical changes, and a more inclusive outlook.

It is imperative for us to reframe and reinvent our understanding of global mobility. Framing it within the conceptual underpinnings of the fourth industrial revolution guided by the 17 United Nations Sustainable Development Goals might be the way forward. The global mobility focus should change from transactional to a transformational and responsible approach for talent acquisition. It should not rely solely on cross-border travel to access education, but newer technology-enabled hybrid learning solutions can expand the field through a distributed approach. Innovation, policy support, and our ability to scale will be crucial here while being cognizant not to expand digital inequality.

Furthermore, when governments show the agility and ability to emphasize the benefit and value of international education, it can incentivize all institutions to harness this promise. The newly released statement by the United States on a coordinated national approach to international education is timely. Along with Australia and the United Kingdom, which already have a national global education policy, this recent action is a very welcome foreign policy imperative and signals an optimistic outlook.

This report on the global mobility flows and COVID-19 realities will provide you the necessary insight into the disrupted trends that have shaped this past year. Let us reimagine how we impart, deliver and transfer knowledge and learning to mitigate the unintended consequences of this COVID-19 crisis. With empathy and kindness, we have a unique opportunity to steady this ship for our students and progress forward with access to the increased skills and values of global engagement in the remaining decade ahead.

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Advisory Committee, IC3 Movement

Introduction

The flow of international students crossing borders to pursue educational opportunities has been significantly affected by the COVID-19 pandemic, causing higher education systems worldwide to consider the context and realities of global academic mobility before and after the health crisis. This joint paper by the Institute of International Education (IIE) and IC3 analyzes significant international student mobility trends before the COVID-19 pandemic, the role of the United States and other host countries in offering international students academic opportunities, and the increased competitiveness among countries to attract international students. The paper will provide an overview of the global mobility flows to and from major world regions in the 2019/2020 academic year. The paper will then consider the effects of COVID-19 on global student mobility and how the pandemic has comparatively affected international students and the countries that serve as their hosts.

Four sections make up the report:

1. **Global mobility flows before COVID-19:** This section uses *Project Atlas®*[1] and UNESCO data to highlight global mobility trends over the past twenty years (2000 – 2020). It provides insight into international student enrollment in leading host countries, focusing on the growth and diversity of international student flows in the last ten years. It then discusses the many factors that motivate international students to pursue higher education outside their home country.

2. **World on the Move 2019-2020**: This section is an excerpt of the World Region Trends chapter of the *Open Doors® 2020 Report on International Educational Exchange* (Martel et al., 2020). It describes global mobility flows to the United States from each world region for the 2019/2020 academic year (pre-COVID-19).

3. **Realities of COVID-19:** This section explores comparative literature and data from IIE's COVID-19 Snapshot Survey Report Series and *Project Atlas* partners to demonstrate the impact of COVID-19 on global mobility flows. It describes unofficial 2020/2021 international student enrollment figures[2] reported from leading host countries and the mode of instruction used by higher education institutions during the corresponding academic year. It then describes how institutions and leading host countries supported international students' mental health and well-being, and financial needs during the 2020/2021 academic year.

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[1] Project Atlas is a global research initiative comprised of 32 partner organizations that disseminate comparable student mobility data, conduct studies on academic migration and the internationalization of higher education, and provide customized workshops and research to strengthen the collection of mobility data around the world. For more information: https://www.iie.org/Research-and-Insights/Project-Atlas.

[2] Official government enrollment figures are typically reported out 6-12 months following the end of the academic year. The unofficial enrollment data cited in this paper is from snapshot surveys of higher education institutions conducted by non-governmental organizations that support student mobility.

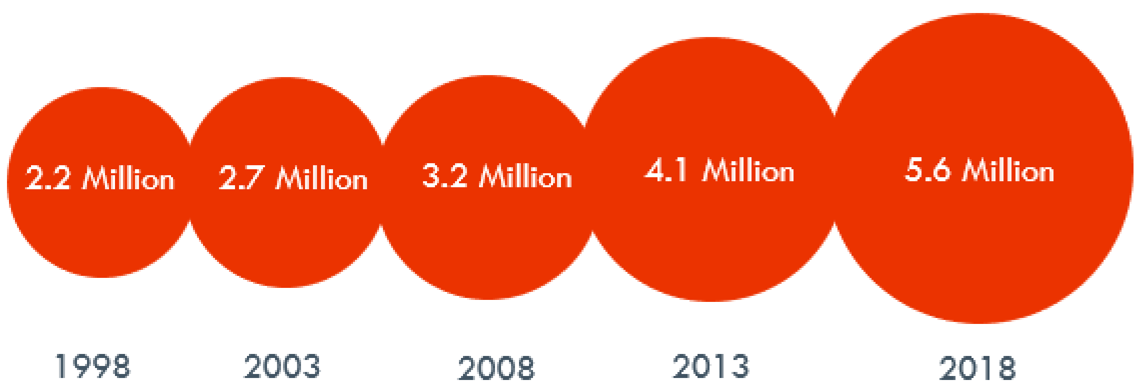
4. **Prospects for International Students**: This final section looks at the situation in spring and summer 2021. It explores comparative literature and data on the options that higher education institutions are providing to international students for study in fall 2021, noting the barriers to enrollment such as border closures, visa issues, and vaccines. It also describes documented interest among international students to study/travel when safe and secure.

As the global pandemic continues through 2021, changes to global immigration, travel and public health policies are taking place on a regular basis. This report documents international student enrollment numbers, global travel restrictions, visa processing services, and public health policies as of May 2021.

Global Mobility Flows before COVID-19

To understand the complete picture of international educational exchange and the impact of COVID-19 on global mobility flows, it is critical first to examine trends in international mobility flows prior to the health pandemic. The rapid increase in global mobility flows in the past twenty years has brought students worldwide an opportunity to pursue education outside their home country. This section outlines some of the primary trends in the 21st century, charting the global increase in student mobility, the rise of leading host countries, as well as growing competition for students in host markets.

Figure 1. International Students Across the World, 1998 - 2018



Source: UNESCO, 2020

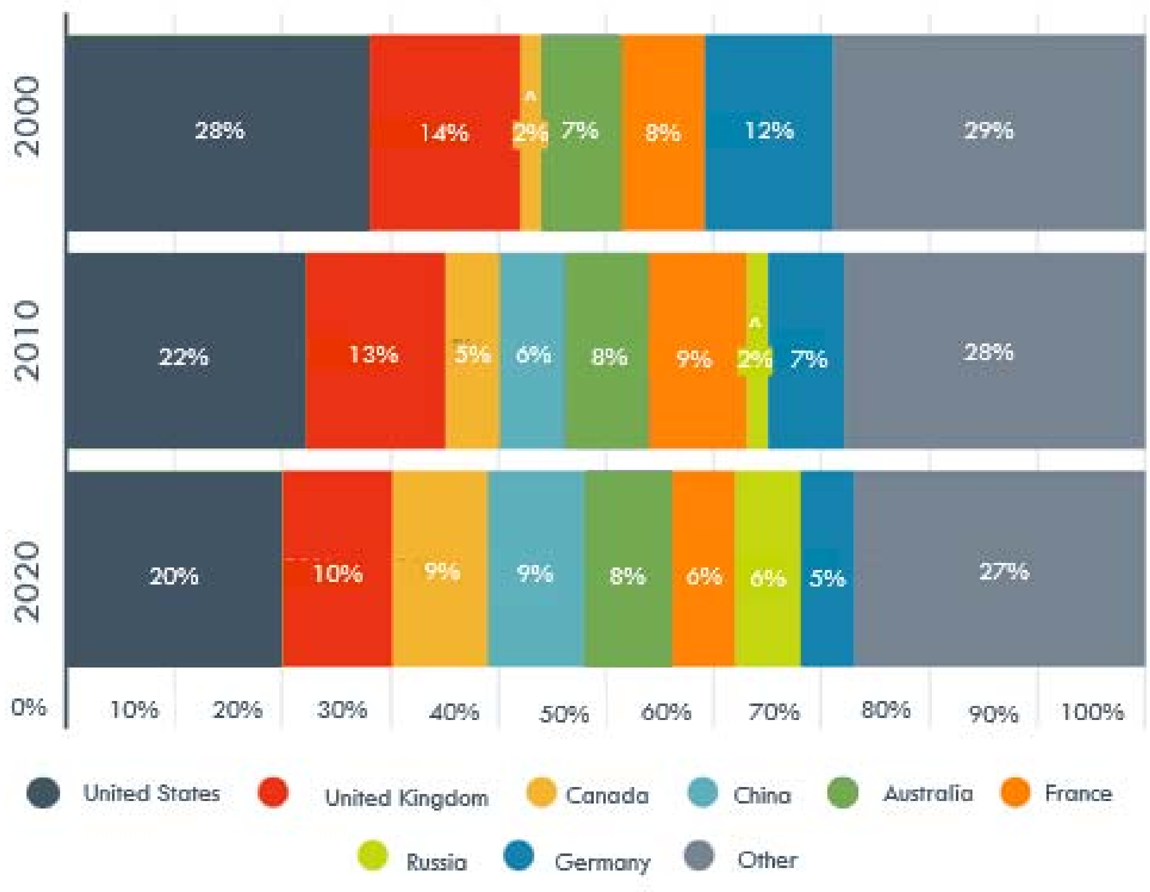
According to UNESCO (2020), the total number of international students who crossed a border to pursue an international educational experience reached 5.6 million in 2018, more than doubling over the last 20 years (Figure 1). In fact, the average per year growth in the number of international higher education students is 4.8 percent (UNESCO, 2020). From 2008 to 2018, the pool of globally mobile students grew by 2.4 million students or 75 percent, but most of the growth (1.5 million students) took place in the last five years.

Several factors have influenced international student mobility trends. First, as student demand for higher education increased, some countries have not had enough capacity in their higher education institutions to meet this demand, pushing students to look for opportunities abroad. Second, in developing countries where wealth has increased, the growing middle class can now afford an education outside of their home country. Third, technological developments have made it easier for students to travel abroad by plane while maintaining connections with friends and relatives in their home country online through the latest communication tools.

Leading Hosts of International Students

As the number of international students has grown over the last 20 years, the destinations of these students have shifted, reflecting increased global competition among countries that want to attract international students to their borders. Nevertheless, the United States, in 2000 and today, remains the top host country. In 2020, one in every five globally mobile students (or 20 percent) studied in the United States (*Project Atlas*, 2020). The United States also hosts nearly twice the number of international students abroad as the next largest host, the United Kingdom. That being said, as the number of countries hosting more than two percent of international students has increased, the United States' market share has decreased, from 28 percent in 2000 down to 20 percent in 2020 (Figure 2).

Figure 2. Leading Hosts of International Students, 2000 – 2020



Source: Project Atlas, 2020

After the United States, the next largest hosts are the United Kingdom and Canada. While the proportion of international students going to the United Kingdom has decreased by 4 percent in the last 20 years, the share of students going to Canada has increased from 2 percent to 9 percent. Also notable is the increase in international students going to China. *Project Atlas®* did not have data from China in 2000. Nevertheless, in 2010 China comprised 6 percent of all international students, increasing to 9 percent in 2020. Together, the top five countries hosted more than half of all international students worldwide.

So, although the United States hosted two to three times more students than other countries in 2010 and remained the leader in 2020, gaining the most students in absolute numbers, growth in other countries occurred at a faster rate, allowing them to gain a portion of the global share. Leading hosts from Europe also lost their share during this period, including the United Kingdom, Germany, and France.

In total numbers, the United States recorded the largest number of international students in the last ten years and the largest increase in total numbers. Yet, some other countries have significantly increased the total number of students in the same period. For example, Canada and China more than doubled their total international student numbers from 2010 – 2020 (Figure 3).

Figure 3. Total International Students in Leading Hosts, 2010 - 2020

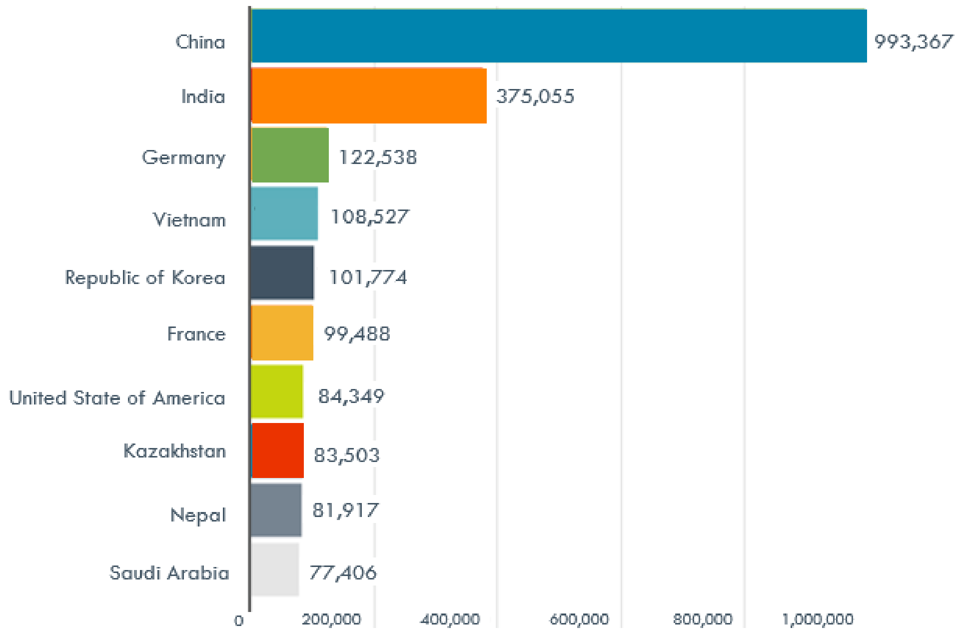
	2010	2020	Difference
United States	690,923	1,075,496	384,573
Canada	174,760	503,270	328,510
China	238,184	492,185	254,001
Australia	245,593	463,643	218,050
United Kingdom	415,585	551,495	135,910
Japan	132,720	228,403	95,683
France	278,213	358,000	79,787
Germany	239,143	302,157	63,014

Source: *Project Atlas,* 2020

Leading Sending Countries

While the first section explained the top countries that host international students, this section outlines the top *senders* of international students. Traditional student flows have been from the developing to the developed world or from the global South to the global North (Bhandari, 2019). In 2020, China was the leading place of origin for international students, with almost one million students (993,367) enrolled at a higher education institution outside their borders (UNESCO, 2020). The top five host destinations of international students from China host nearly 90 percent of Chinese students and include the United States, Australia, the United Kingdom, Canada, and Japan. India was the second-largest sender of international students, with almost 400,000 students enrolled at institutions primarily in Canada, the United States, and Australia. Germany, Vietnam, and South Korea round out the top five, all sending over 100,000 students to pursue education abroad.

Figure 4. Top Places of Origin of International Students, 2020



Source: UNESCO, 2020

Similar to international student host countries, the leading places of origin for international students have also shifted over the last twenty years. In 2000, for example, the top five places of origin for international students were China (7 percent), South Korea (3 percent), India (3 percent), Japan (3 percent), and Greece (3 percent) (UNESCO, 2020). Growth in the number of students from top sending countries increased across the board. However, the increased proportion of students in 2020 from China (18 percent) and India (7 percent) was noteworthy. The proportion of students from China grew by 11 percent (from 7 percent in 2000 to 18 percent in 2020). The proportion of students from India grew by 4 percent (from 3 percent in 2000 to 7 percent in 2020). This growth trend largely mirrors findings in the United States, where the number of students from China grew from 59,939 to 372,532 in the 20 years (*Open Doors*, 2020).

In 2020, Chinese and Indian students made up 53 percent of all international students in the United States (*Open Doors*, 2020). China and India also comprise more than 50 percent of international students in Australia and Canada and more than a quarter of international students in the United Kingdom (*Project Atlas*, 2020).

Table 1 presents data on five-year growth in international student enrollments from China and India between 2015 and 2020 to show which host countries are attracting the greatest number of students. Looking first at international students from China, the increase in the total number of students was highest in Australia, followed by the United States, with increases of 74,720 and 68,492 students, respectively. However, in parentheses is the percent growth in this number, from 2015 to 2020. When looking at the data from this perspective, the largest percent growth occurred in Australia (82 percent) and the United Kingdom (39 percent). This level of growth indicates that, although the United States hosts the largest number of students from China, over the past five years, students from China enrolled at institutions in Australia in greater numbers and at a faster rate than in the United States.

Table 1: Enrollment Growth in International Students from China and India, 2015 - 2020

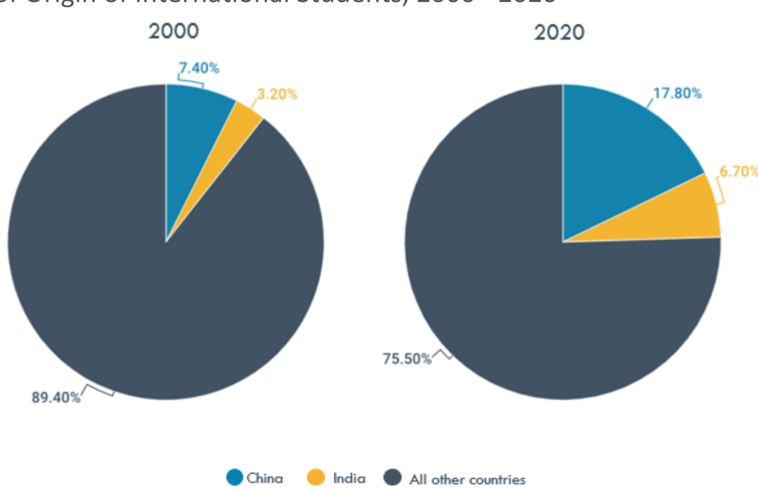
Students from China			
Australia	Canada	United Kingdom	United States
+74,720 (82%)	+11,236 (13%)	+36,130 (39%)	+68,492 (23%)
Students from India			
Australia	Canada	United Kingdom	United States
+64,485 (244%)	+161,351 (431%)	+6,917 (33%)	+60,236 (45%)

Source: Project Atlas, 2020

Changes in the destination trends of Indian students vary even more. The five-year growth in the total number of students from India was highest in Canada, increasing 161,351 students from 2015 to 2020. This increase represented a 431 percent growth in international student enrollment from India. The rapid growth in Canada is evident when compared with the United States. The United States also saw an increase in the total number of students from India. However, the increase of 60,236 students only resulted in a 45 percent growth. This indicates that, over the past five years, students from India enrolled at higher education institutions in Canada in greater numbers and at a much faster rate than in the United States. In 2020, Canada surpassed the United States and became the leading host of students from India pursuing higher education.

While students from China and India made up more than 50 percent of the international students in most leading host countries (including the United States), Figure 5 indicates that these two countries still made up only one-quarter of all international students (UNESCO, 2020). As a result, while institutions' student outreach and recruitment activities should consider the sizeable number of students from China and India, host countries should also seek to attract international students from other destinations.

Figure 5. Top Places of Origin of International Students, 2000 - 2020



Source: UNESCO, 2020

The Push and Pull Factors Affecting International Student Mobility

Across the globe, host countries have sought to attract international students to pursue higher education in their country. Initiatives targeted to internationalize higher education have emphasized the value international students bring by diversifying the student body and sharing new perspectives. International students contribute revenue to the local economy throughout their studies and represent a potential expansion to the pool of skilled labor upon graduation. But, what makes a student decide to pursue higher education outside of their home country?

Understanding mobility flows and the factors contributing to their patterns can guide higher education institutions seeking to recruit international students and inform policymakers working to address labor and immigration issues. The contributing factors often referred to as "push and pull factors" affect students' decisions around international study. Push factors motivate (or push) a student to leave their home country in pursuit of higher education. On the other hand, pull factors attract or draw students towards a new country for their higher education. This section describes how push and pull factors have contributed to the competition between leading host countries to attract international students. It then explores the effect of demographic shifts on host and sending countries.

The competition for global talent is real.

The international student enrollment data from the previous section illustrate that as more students pursue an education abroad, more countries are interested in hosting them. And as emerging destinations join long-standing hosts, the value international students bring to a host country further increases. The following pull factors describe host country actions to attract international students:

Recruitment Strategy: Several long-standing international student hosts have organized strategies and set recruitment targets to attract international students to their countries. Countries with active international recruitment also created or expanded alumni networks. In addition, host countries modified post-degree practical training policies that provide international students with the opportunity to remain in-country longer to gain valuable work experience after completing their degree.

Emerging Destinations: A set of newer destinations committed to hosting international students have emerged as regional hubs, welcoming students from neighboring countries. This is particularly evident in Asia, where countries with a growing middle class invested in building higher education capacity (Times Higher Education, 2020). Many countries, such as Japan, have also invested in English medium programs and universities, increasing their ability to attract international students and faculty (Altbach & de Wit, 2019).

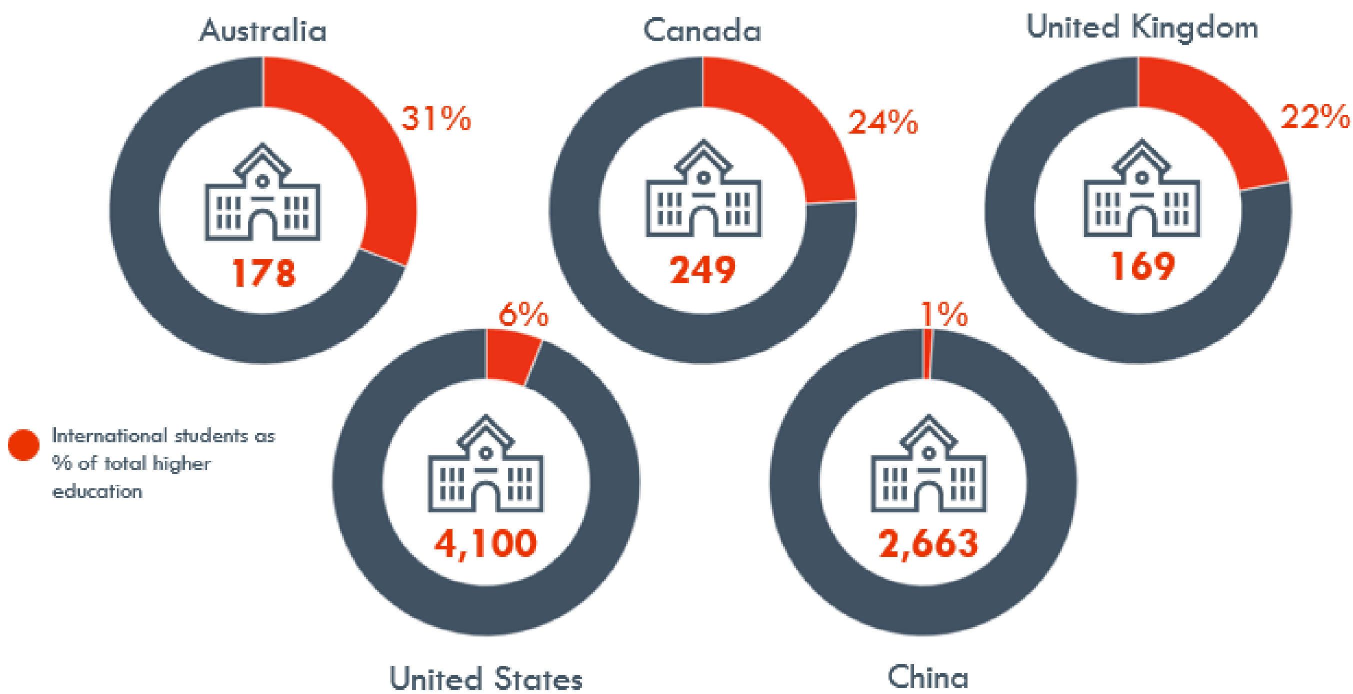
Demographic shifts affect host and sending countries.

The world population continues to grow. However, population growth varies widely across the globe resulting in different needs for education and the workforce at different times. This section describes the contrasting needs of countries with a growing population and those with a declining population.

Growing population: Countries with a high birth rate are experiencing rapid population growth and, in many cases, have limited higher education capacity to support the demand from a growing number of students who want to pursue a tertiary degree (Martel et al., 2019). In Bangladesh, Nigeria, and Pakistan the pool of university-aged youth continues to grow (World Bank, 2019). The average incomes in developing economies were expected to grow too, positively affecting higher education enrollments.

Declining population: Conversely, declining birth rates and aging populations in other parts of the world motivate countries to recruit international students who help build a pool of global talent, diversify perspectives in higher education, and contribute to the local economy. For example, in the United States the birthrate has fallen nearly 20 percent since 2007 (Tavernise, 2021). This has in turn led many U.S. higher education institutions to adjust their recruitment strategies and focus on international students who can help to fill higher education institutions' enrollment capacity. The United States has more than 4,000 higher education institutions. In 2018/19, international students represented less than 6 percent of the total enrollment (*Open Doors*, 2020). In comparison, international students represented more than 20 percent of the total higher education populations in Australia, Canada, and the United Kingdom, each with fewer higher education institutions than the United States (Figure 6). Therefore, the United States has a greater capacity to host additional institutional students, while other leading hosts may be limited by the size of their higher education sector.

Figure 6. Capacity to Host International Students



Source: Project Atlas, 2020

International Student Mobility Trends by Region, 2019/2020

In 2019/2020, international students came to the United States from over 200 places of origin. This section describes global mobility flows to the United States by each world region for the 2019/2020 academic year. As a result, the data reflects student mobility before the COVID-19 pandemic began. The regional overviews describe international student trends with attention to the push and pull factors affecting student mobility. This section is an excerpt from the *Open Doors 2020 Report on International Educational Exchange* (Martel et al., 2020).

Asia

In 2019/2020, postsecondary students from across Asia accounted for more than 70 percent of all international students in the United States. Students from China and India alone accounted for 53 percent of international students in the United States. China was the leading place of origin of international students for the 11th consecutive year, reaching a high of 372,532 students. The increase in student numbers from China (+ 1 percent) and Mongolia (+8 percent) offset declines from other East Asian countries, leaving the region with flat growth. The number of students from South, Central, and Southeast Asia declined. The number of Indian students in the United States declined for the first time in 7 years, decreasing by 4 percent in 2019/2020, driven primarily by declines in Indian graduate students and those pursuing OPT. The number of students from Bangladesh continued to increase in 2019/2020, moving Bangladesh into the top 20 largest places of origin (17th).

Europe

Europe remained the second leading region of origin for international students in the United States for the third year in a row despite a slight decrease (-1 percent) in the proportion of students in 2019/2020. Five European countries – France, Germany, Spain, Turkey, and the United Kingdom – were among the top 25 places of origin for international students, well behind the top senders in Asia. Student absolute numbers increased slightly from Germany (+1 percent) and Spain (+10 percent) while the number of students decreased from Turkey (- 7 percent) and the United Kingdom (-4 percent).

Latin America and the Caribbean

Student mobility from Latin America and the Caribbean to the United States remained flat in 2019/2020, with declining numbers from Mexico, Central, and South America, offset by growth in the number of students from the Caribbean. Declining numbers of students from the Middle East and North Africa (MENA) made Latin America and the Caribbean the third-largest regional sender to the United States after Asia and Europe. The 80,204 students from Latin America and the Caribbean represented 8 percent of international students in the United States. Although smaller in absolute numbers, gains from the Bahamas (+16 percent), Jamaica (+2 percent), and other Caribbean nations in 2019/2020 likely reflected the number of displaced students who sought to continue their higher education in the United States following the devastation of Hurricane Dorian (Drier, 2019). In 2019/2020, the number of

Brazilian students in the United States increased for the third year in a row, up 4 percent. Gains were also seen in the number of students coming to the United States from Costa Rica (+7 percent), Peru (+4 percent), and Argentina (+1 percent).

Middle East and North Africa

The MENA region accounted for 7 percent of the international students in the United States. Falling for the fourth consecutive year, international student enrollment from the MENA region fell another 11 percent in 2019/2020, which allowed Latin America and the Caribbean to surpass MENA in the rankings of regional senders to the United States. As a result, MENA dropped to the fourth-largest regional sender to the United States.

Saudi Arabia alone comprised 43 percent of international students to the United States from the MENA region. In 2019/2020, the number of students from Saudi Arabia declined 17 percent to 30,957, due in part to a narrowing of the Saudi Arabian government scholarship eligibility requirements as well as economic reforms impacting the middle class. As the leading source of students from the region, the drop in Saudi students led to an overall decline of 11 percent in students from the Middle East.

Sub-Saharan Africa

More than 40,000 students from Sub-Saharan Africa enrolled in U.S. higher education institutions in 2019/2020, increasing 4 percent from the prior year. The only Sub-Saharan African country among the top 25 places of origin, Nigeria, saw student numbers grow by 3 percent in 2019/2020 to 13,762 students. Ghana continued to experience record growth (+15 percent), with the more than 4,000 students from Ghana enrolling at U.S. higher education institutions. The numbers of students coming from Ethiopia (+14 percent), South Africa (+9 percent), and Kenya (+8 percent) all increased.

North America and Oceania

Canada remained the fifth leading sender of international students to the United States, with 25,992 students in 2019/2020.

The United States hosted 7,473 students from Oceania in 2019/2020, 90 percent of whom were from Australia (67 percent) or New Zealand (25 percent).

Anglophone countries in North America and Oceania are among the top hosts of international students worldwide. The appeal of expansive program options, state-of-the-art education facilities, and practical training are among the reasons the United States, Canada, Australia, and New Zealand – together – hosted approximately 38 percent of all globally mobile students (*Project Atlas*, 2020).

The regional overviews highlight leading places of origin for each world region and provide context about factors contributing to international student enrollment trends. This data serves as a critical benchmark for international student mobility to the United States before the pandemic to compare international student trends.

International Student Mobility amid the COVID-19 Pandemic

At the onset of the pandemic in early 2020, countries and higher education institutions were uncertain about the options for international student enrollment in future semesters. This section outlines international student enrollment during the 2020/2021 academic year. It details the mode of instruction offered by institutions in leading host countries. Then, it describes two critical areas of support that institutions in leading host countries provided to students during the academic year, mental health and financial support.

2020/2021 International Student Enrollments

As the global pandemic continues into its second year, research has emerged from countries around the world documenting the effect of COVID-19 on global mobility flows. While official international student enrollment numbers for this period will first be released at the end of 2021 into 2022, there is evidence that international student enrollment in most leading host countries for the 2020/2021 academic year declined.

The anticipated drop in international student enrollment for many countries was not as steep as initially predicted by higher education leaders and researchers at the start of the pandemic (American Council on Education, 2020; DiMaria, 2020). This surprising turn of events can be credited, in part, to remarkably innovative and flexible higher education institutions worldwide. Institutions transformed overnight from providers of education in a physical classroom space to a virtual environment. Simultaneously, international education researchers, intent on documenting this historic turn of events, collected data on international student enrollment for those both physically present in their host country as well as those participating in coursework online from outside of their host country. The figures that follow represent the latest information available on leading host countries, collected via snapshot or similar surveys by *Project Atlas* partners, and, in most cases, do not represent official government numbers.[3]

Among the top five host countries for international students, enrollment varied from declines of approximately 20 percent to a modest decrease. The total number of international students at higher education institutions in the United States and studying online outside the United States decreased by 16 percent in fall 2020 (Baer, J. & Martel, M., 2020). A similar decline of 17 percent was reported among international students enrolled at all education levels by the Immigration, Refugees, and Citizenship Canada (CBIE, 2021).

In Australia, enrollments at the end of 2020 were down five percent from the previous year in the higher education sector (Australian Government, 2020). However, March 2021 international student enrollment figures showed a further decline of 12 percent in the Australian higher education sector from 2020 (Australian Government, 2021a). A May 2021 Australian government snapshot report noted

[3] Data represented in this section is from multiple sources and may include both physical and online enrollment figures or solely counted students physically present in country.

that growing enrollment numbers outside Australia offset the decrease in enrolled students in Australia (Australian Government, 2021b).

Official and projected counts from China are not available at this time; however, Chinese borders remain closed to international students. Students cannot yet apply for visas to enter the country for in-person academic study, though many institutions have offered some form of virtual instruction (ICEF Monitor, 2021b). Similarly, Japanese borders have been closed for lengthy periods throughout the pandemic, with limited exceptions for individuals from a short list of neighboring countries. Japan recorded a decrease of approximately four percent or 10,000 international students in 2020 (JASSO, 2021).

In the United Kingdom, the onset of the pandemic coincided with Brexit, another potential factor affecting international student enrollments from the European Union. The U.K. Home Office (2021) reported study visas issued to international students in 2020 decreased by 21 percent from the previous year. While this gives an indication of international student enrollment, it does not account for students learning online from outside of the United Kingdom. In contrast, international student enrollment in Germany for the 2020/2021 academic year, which included students enrolled and participating in either in-person or online courses, is projected to increase to more than 330,000 students despite a one percent decline in new international student enrollments (DAAD, 2021).

A closer look at the data from leading host countries reveals several emergent trends around international student enrollments highlighting a key difference by planned duration of study (i.e. students who planned to participate in a short-term exchange (typically one year or less) and students who planned to complete a degree program (typically academic study of more than one year).

Short-term exchange student enrollment numbers decreased markedly. As programs were postponed or canceled, short-term exchange students may have opted to travel to a different country or forgo the in-person study abroad experience entirely (EAIE, 2021). In addition, travel restrictions, visa delays, and public health policies may have rendered the opportunity impractical. For example, the ERASMUS program that facilitates exchange between countries in the European Union found that more than half of ERASMUS students remained at home due to border closures or because institutions had moved all courses to a virtual environment (EAIE, 2021).

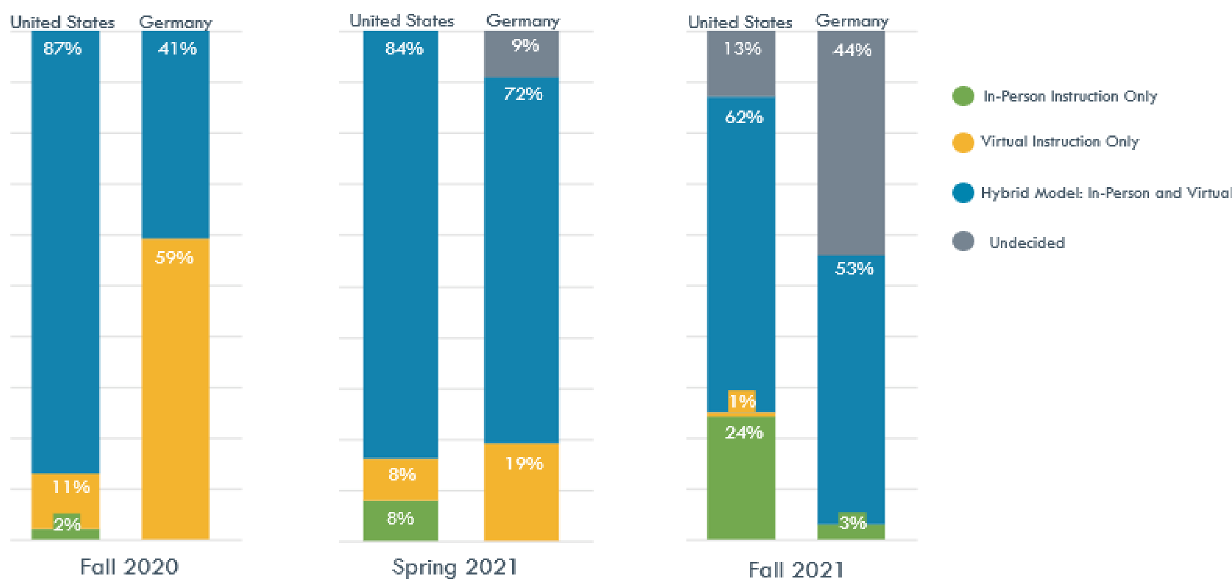
Continuing international degree-seeking student enrollment was stable. There may be several contributing factors to this trend. First, some countries noted declines in 2020 commencement data indicating that international students paused or slowed the pace of their academic study, thereby remaining enrolled for a longer period at their host institution. Additionally, many institutions provided support for continuing international students who were already in the country and continued their studies. As a result, continuing international student numbers held steady, and declines were reported primarily around new international student enrollment.

Enrollment figures varied when looking closely by institution type. Large research institutions appeared to fare better than other institutions, and, in some countries, increased enrollment at research institutions offset declines at other, smaller institutions.

Mode of Instruction

The international student enrollment figures reflect the actions taken by institutions to support international students in pursuit of a higher education. Among the leading host countries, nearly every higher education institution reported pivoting to a virtual or hybrid model of instruction at some point during the 2020/2021 academic year to provide students with instructional continuity. However, this played out differently over the year and is reflected differently in planning for fall 2021 according to location (Figure 7).

Figure 7. Mode of Instruction



Source: Martel & Baer, 2021; DAAD, 2021

Institutions in the United States began the fall 2020 semester largely in virtual or hybrid mode. As the calendar year progressed, U.S. institutions offered more in-person options to international students for spring 2021 semester coursework. In contrast, more than 80% of German institutions started the fall 2020 semester in virtual or hybrid mode, with more than half transitioning fully online as the semester progressed. More than two-thirds of German institutions returned to a hybrid model in the spring semester, and at least half expect to begin the fall 2021 semester in hybrid mode. According to the latest IIE COVID-19 snapshot survey, more than 90 percent of U.S. institutions plan to begin the fall 2021 semester in-person (Martel & Baer, 2021). Canadian institutions are also announcing plans to reopen institutions with in-person instruction in fall 2021 (Thevenot, 2021).

Providing even a small amount of in-person study positively affects students' satisfaction with their learning experience. According to Nuffic, during the fall 2020 semester, students who attended at least one-quarter of their classes in-person were more satisfied with their study experience (Elfferich et al., 2021).

Throughout the 2020/2021 academic year, higher education institutions have continuously assessed instructional priorities alongside public health and safety guidelines. The British Council mapped out this decision process on a global scale through a series of heatmaps reflecting the status of each countries' decision on in-person study. Institutions' flexibility to change course based on their analysis has enabled international students to continue their studies uninterrupted.

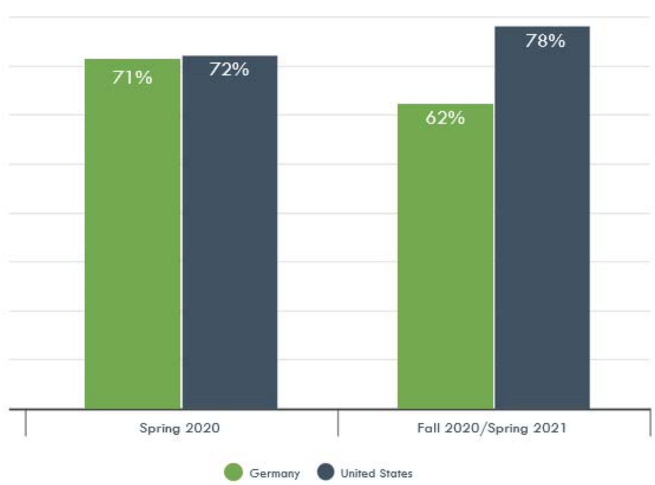
Online instruction was also a benefit to students who were unable to travel or were awaiting a visa. In the United States, one in five international students (20 percent) studied online from abroad in Fall 2020 (Baer & Martel, 2020). The Netherlands similarly reported 20 percent of international students studied online from outside of the Netherlands (Elfferich et al., 2021). In countries where borders were closed, participating in online instruction was the only way for international students to remain enrolled. In Australia, one in four international students studied online from abroad in March 2021, a number that has increased steadily since July 2020 (Australian Government, 2021b).

The mode of instruction for students who were enrolled during the 2021/2021 academic year had implications for other aspects of students' lives including their mental health and wellness, and finances.

Mental health and wellness support

The uncertainty around enrollment, mode of learning, and all other logistical aspects of a students' academic study created stress and anxiety for many students (Son et al., 2020). Pandemic stress is real and international students are not immune. More than 70 percent of international students indicated increased stress and anxiety due to the COVID-19 outbreak (QS, 2021c). Yet, only 57 percent of students sought support services from their institution due to the pandemic. Over the last year, institutions consistently reported increasing communications to international students on their health and well-being, as shown in Figure 8, showing communication levels consistently above 60 percent from institutions in Germany and the United States.

Figure 8. Increased communications on health, well-being

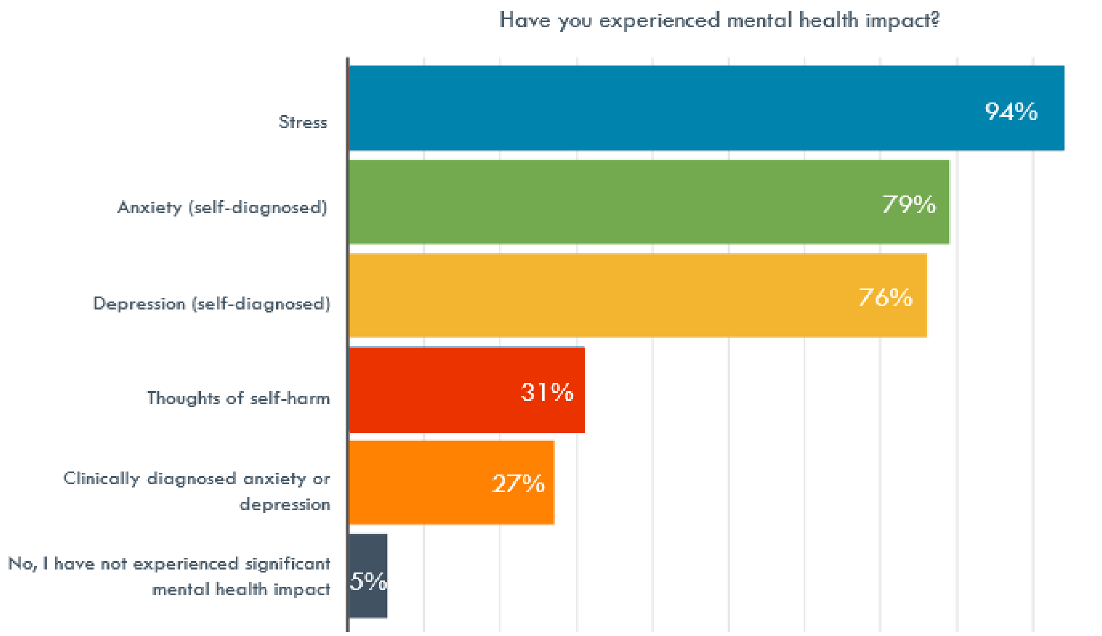


Source: Martel & Baer, 2021; DAAD, 2021

Students' stress and anxiety during the 2020-2021 academic year may have varied depending on their home country and host destination. For international students locked out of Australia, the Council of International Students Australia reported that international students' stress and anxiety stemmed from prolonged uncertainty about their academic study situation, loss of motivation, concern around their career plans, as well as the financial impact due to housing, storage, or other contractual obligations (Lim, 2021). Among student respondents of this survey, 94 percent reported feeling stress while 79 percent diagnosed themselves with anxiety (Lim, 2021). Prolonged experiences of stress and anxiety can be a major concern for international students and their families. These concerns are likely echoed by students unable to reenter China and other countries where their studies were abruptly interrupted.

International students studying online in their host country reported feelings of isolation and loneliness (Source, 2021). A study of international students in the Netherlands specifically noted that international students experiencing anxiety and loneliness were most worried about their future professional career (Elfferich et al., 2021).

Figure 9. Factors that negatively impact students mentally due to border closure

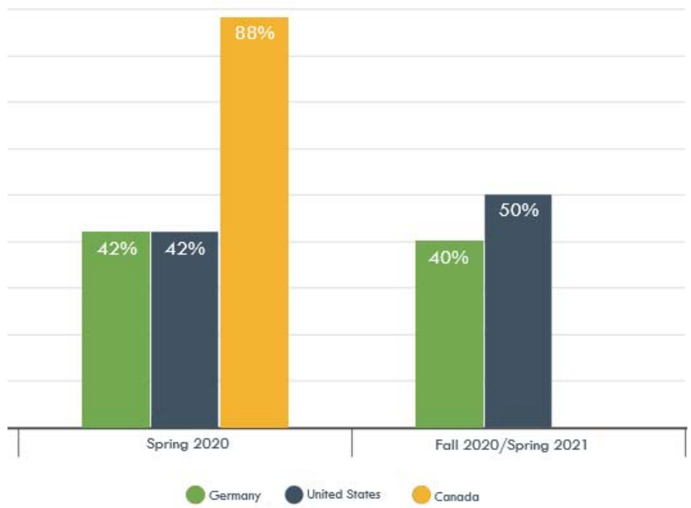


Source: CISA report on Australia

Financial

Financial support and advocacy for international students by institutions and organizations globally have continued. Governments and other entities in the United States, Canada, the United Kingdom, Germany, and Australia provided students with emergency funding to alleviate the financial stress caused by the pandemic. For example, IIE's Emergency Student Fund has provided funding to over 1,000 international students for their necessary expenses since the start of the COVID-19 pandemic. In separate snapshot surveys conducted by IIE for the United States and DAAD for Germany, more than 40 percent of higher education institutions reported providing emergency student funding in spring 2020 (Martel & Baer, 2020; DAAD, 2021). Results for Canada's snapshot survey conducted by CBIE showed nearly 90 percent of higher education institutions reported providing international students with emergency funding in spring 2020 (CBIE, 2020). In the 2020/2021 academic year, institutions continued to provide this support to international students with IIE and DAAD reports indicating that nearly half of higher education institutions provided emergency funding (Martel & Baer, 2020; DAAD, 2021).

Figure 10. Provision of Emergency Student Funding



Source: CBIE, 2020; DAAD, 2021; Martel & Baer, 2021

Prospects for International Students

Barriers to International Student Mobility

As we move into summer 2021, institutions are focused on preparing for the start of the fall 2021 semester. Many higher education institutions have found themselves caught between their desire to support international students and their countries' travel, immigration, and public health policies. Among leading host countries, differences in their approaches to each of these three areas have affected international student enrollment regarding both physical and virtual mobility.

Border Closures

Border closures have created stark differences among leading host countries. The United States, the United Kingdom, and Canada have eased travel restrictions to allow international students to reenter the country for study purposes. The increase of in-person instruction has accompanied these actions. However, as of May 2021, borders remain closed in many parts of the world, including in Australia, China, and Japan. Australia and China have indicated borders will remain closed into 2022 (ICEF Monitor, 2021a; Tudge, 2021). While Australia has expanded virtual instruction for students through its 'Study with Australia' campaign, options in China are limited, and students studying in some STEM fields are frustrated with the online offerings (ICEF Monitor, 2021a; Tudge, 2021).

As border closures wear on, recruitment agents struggle to sustain their business (ICEF Monitor, 2021a). Longer border closures in key markets that send international students abroad may result in the reduction of agents and loss of knowledge, a ripple effect that could further delay restarting once countries are ready to welcome students back.

Visas

Global disruption to visa processing systems affected international student visas significantly in 2020. While some countries opted to halt visa processing in 2020 completely (e.g., Australia, United Kingdom, China), reduced capacity at visa processing centers in other countries resulted in lengthy wait times (e.g. United States, Canada). As of June 2021, while many countries have reopened or increased capacity at visa processing centers, potential "waves" of COVID-19 cases could reverse these decisions in certain countries. A significant backlog also remains. Regardless, the uncertainty around visa application processing coupled with the complexity of the application documents themselves has left many international students feeling hesitant about their next steps towards selecting and committing to a study destination.

Vaccines

The vaccine rollout remains highly variable by country. This in turn affects higher education policies regarding student vaccination requirements as institutions weigh the decision of when and how to invite students back to campus. However, nearly half of international students surveyed indicated that the introduction of the COVID vaccine did not affect their plans to study abroad (QS, 2021b). Another 21 percent noted they would be willing to begin their studies earlier.

Approximately half of U.S. institutions (45 percent) do not intend to require vaccinations for students, faculty, or staff before they come to campus for the semester (Martel & Baer, 2021). Those institutions that plan to resume in-person study were more likely to require vaccinations, though they were equally likely to have not made a final decision. Only 14 percent of U.S. institutions noted a current vaccine requirement.

In the United States and United Kingdom, a swift vaccine rollout in spring 2021 accompanied by the ability for college-aged students to access vaccines, has enabled institutions to make the decision to welcome students to campus for in-person instruction in fall 2021. For Canada and Australia, the vaccine rollout will take through the summer and possibly into early fall. As a result, institutions are left in limbo, waiting to reassess the COVID situation before the academic year begins in order to make their final determination around mode of instruction.

Higher education institutions are responding to the uncertainty perpetuated by the COVID-19 pandemic and related travel, immigration, and public health policies by supporting students in a wide variety of ways. The pandemic brought to light the need for institutions to provide students with options for pursuing or continuing their education alongside additional mental health and financial support to ensure their overall well-being. Approximately 75 percent of international students felt that the support provided by their institution had a moderately, very, or extremely effective (QS, 2021c). The response from institutions globally has been positively recognized by students in multiple surveys and reports and may be a contributing factor to students' strong interest in pursuing a higher education outside of their home country.

Options for continued study

Due to the variable situation across countries, nearly every option is on the table for international students in fall 2021. These options include:

- in-person study,
- deferral to a future semester,
- online enrollment,
- online enrollment until a student can arrive at the institution,
- enrollment at an international branch campus.

In the United States, enrollment options for international students in fall 2021 show a decisive return to in-person study (Martel & Baer, 2021). Approximately 90 percent of institutions plan to offer international students in-person study in the United States. For students who may not be able to travel to the United States due to visa delays or travel restrictions, colleges and universities continue to offer flexibility. Approximately 73 percent of institutions noted offering students deferment to spring 2022, and 47 percent noted that they would offer online enrollment to international students until they could come to campus in person. Very few colleges and universities (5 percent) noted options for international students to enroll in branch or partner campuses abroad for the fall 2021 term.

The option for in-person study is not as definitive in other leading host countries as it is in the United States due to border closures and other pandemic-related issues. However, higher education institutions are working hard to ensure international students can pursue or continue their academic studies through online enrollment and deferred admissions options amidst all of these uncertainties.

Most U.S. higher education institutions (77 percent) reported funding outreach and recruitment of international students at the same levels or higher than previously (Martel & Baer, 2021). Priorities for outreach to international students continue, with institutions focusing on online recruitment events (73 percent), working with current international students (68 percent), and social media (65 percent). Other leading host countries reported a similar focus on online recruitment events (DAAD, 2021). Overall, nearly half of higher education institutions from 61 countries reported feeling optimistic about international student recruitment in 2021 (QS, 2021a).

Student Interest

International students remain interested in pursuing a higher education degree. As countries roll out vaccines and open borders, international students regain the confidence to travel overseas for study. 42

percent of international students indicated that they would feel comfortable traveling overseas for study once campuses are open and in-person instruction has resumed. In comparison, 38 percent felt comfortable once a coronavirus vaccine is widely available (QS, 2021c).

Student interest is further evident in the increased application numbers from international students for study in the 2021/22 academic year reported by leading host destinations. Approximately 43 percent of responding U.S. institutions indicated an *increase* in their application numbers from 2020 (Martel & Baer, 2021). U.K. institutions reported a similar proportion of increased application numbers for fall 2021 (BUTEX, personal communication, June 17, 2021).

A May 2021 Navitas report of approximately 900 agents in 73 countries found that students were more attracted to host destinations where they perceived the health crisis was managed well (Chew et al., 2021). Agents indicated that students were most interested in Canada and the United Kingdom for international study, with the United States gaining significant momentum from their previous survey results. The report further notes that student interest has declined in countries where borders remain closed.

A recent internal survey by the College Board finds continued high-interest levels among Chinese students to pursue a higher education abroad. The U.S. is still the leading educational destination of choice (Blumenthal, 2021).

Conclusion

Higher education institutions around the world are working hard to provide options for international students, including hybrid instruction models and other options for study as we anticipate fall 2021. Their efforts to support international students and maintain a welcome environment through increased communications, mental health and well-being services, financial support, and other actions will prove incredibly important in the years to come. At the same time, higher education institutions remain bound to the COVID-19 response of their respective countries. Students and institutions must make decisions in spring and early summer 2021 for enrollment in fall 2021. These decisions have proven difficult for many to make with the dynamic nature of the COVID-19 pandemic on policies, covid rates, vaccination rollouts, travel, and visa restrictions. Despite these challenges, international education will continue in its many forms, with students interested in an education abroad and many countries eager to host them, this fall and in the future.

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The Institute of International Education (IIE) is the leader in providing international education strategies and program services. We work with policymakers, educators and employers across the globe to prepare students and professionals for the global workforce and equip them to solve the increasingly complex challenges facing our interconnected world. With support from donors, we also create initiatives that protect students, scholars, and artists in danger, expand teaching and learning across cultures, and provide opportunities to underserved populations. A not-for-profit organization founded in 1919, IIE has a network of 17 offices and affiliates worldwide and over 1,600 higher education partners.

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