



# Prospects for International Students amid Rebounding Global Mobility

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## Foreword

The impact of the COVID-19 pandemic is vast and not yet fully discovered. Through the lens of international education and student mobility, the immediacy of closed borders, canceled programs, shifts to online learning, and the absence of students on campuses around the world was dramatic. The responses to the pandemic most often placed the health and safety of learners and educators at their centers. Mitigation efforts to introduce some levels of predictability and continuity for students have been impressive, but the students we now enroll will certainly feel the lingering effects of the pandemic upon preparation for or perhaps interest in pursuing studies abroad.

Still, in the midst of emerging from the strange and reactive lives most of us have experienced during the past two years, the need for retrospection, care, and healing is ever important. Much attention has been paid to the influence that the pandemic has had upon the mental well-being of students. Globally mobile students are a proportionately small percentage of overall university-going students. However, the challenges they have faced as a group during the past two academic years have been amplified by reports of discrimination, isolation and loneliness, and resultant susceptibility to depressive episodes (Maleku et al., 2021; Hari, Nardon & Zhang, 2021). Similar risks have been identified among high school-aged students who have lost vital years of social interaction, interpersonal development, and a rapid shift in educational delivery modes (Lee, 2020).

As enrollment and education professionals consider what we have learned from the COVID-19 pandemic, many of us are hopeful that successes realized through rapid changes that we have made to accommodate continued learning may remain a part of our field. Our challenge as leaders in this area is to ensure that we now afford opportunities for thoughtful study of what has shifted that can benefit student learning, access, and global mobility in a post-pandemic world. Opportunities for greater access to students interested in going abroad have been realized as admissions officers and counselors have made virtual connections with international students a norm. Technological advances and access to telecommunication and online learning platforms have demonstrated varying levels of effectiveness in increasing access to global learning communities regardless of a student's physical location.

The importance of presence and community within an international learning experience cannot be overstated. We see the benefits of this on full display as our campuses and schools have again filled with students and, perhaps, the absence of that togetherness taught us the greatest lesson we have to learn. We are a curious and social species. We are also a species who care for one another, perhaps more often than we might assume. A colleague recently expressed her belief that the COVID-19 pandemic has proven to us that we are capable of change. While change may not always be sought, it can always be learned from, and with care and contemplation, we may be better stewards of international students, our communities, and ourselves.

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## Introduction

Global student mobility patterns are shifting amid the COVID-19 pandemic, and policy interventions have indicated shifting priorities in regions looking to rebound international student numbers on their higher education campuses. This report provides an overview of global student mobility flows to and from the United States in the 2020/21 academic year, drawing on the *Open Doors 2021 Report on International Educational Exchange* (Martel et al., 2021) and IIE'S *COVID-19 Snapshot Survey Series* (2021). The report then discusses the realities of international students from India and their goals for outbound mobility and international study. We conclude with COVID-19 learnings from U.S. higher education institutions that will influence international student outreach and recruitment.

## COVID-19 and Mobility: A Global Perspective<sup>1</sup>

According to UNESCO (2021), before the COVID-19 outbreak, the total number of globally mobile international students had reached upwards of 6.1 million in 2019, growing significantly in the last decade. The global shock of the COVID-19 pandemic spurred historic changes to international student mobility starting as early as December 2019.

IIE's *COVID-19 Snapshot Survey Series* (2021) and similar surveys conducted by *Project Atlas*® partners provide evidence that the impact on student mobility has been felt around the world (CBIE, 2020; EAIE, 2021; Elfferich, et al., 2021; DAAD, 2021; JASSO, 2021; Martel, 2021). At the student level, short-term exchange programs were disrupted – some have now resumed while others remain paused. Continuing international student enrollments remained stable as new international student enrollment declined.

Among the leading hosts of international students, including the United States, United Kingdom, Canada, and Australia, nearly every higher education institution reported pivoting to virtual or hybrid models of instruction during the 2020/21 academic year to provide students with instructional continuity (Mason, 2021). Throughout the 2020/21 academic year, higher education institutions continuously assessed instructional priorities alongside public health and safety guidelines. The mode of instruction for students enrolled during the 2020/2021 academic year had implications for other aspects of students' lives, including their health and wellness and finances. Higher education institutions across the globe partnered with organizations and associations to respond to students' varied needs.

Many traditional push and pull factors associated with global academic mobility remain more relevant than ever as students and institutions reassess the value of an international degree and reflect on how higher education is delivered and experienced in the COVID era. Recent studies report that students prioritize health and safety in selecting where to study (QS, 2021). However, as borders open, the mode of instruction is increasingly an influential factor for students. Some students are eager to participate in

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<sup>1</sup> This section is excerpted from the *Open Doors 2021 Report on International Educational Exchange*, funded by a grant from the U.S. Department of State, Bureau of Educational and Cultural Affairs.

in-person coursework in a host country. In contrast, others prefer to take advantage of the opportunity to pursue study at their desired institution without the financial burden of travel and accommodations outside of their home country.

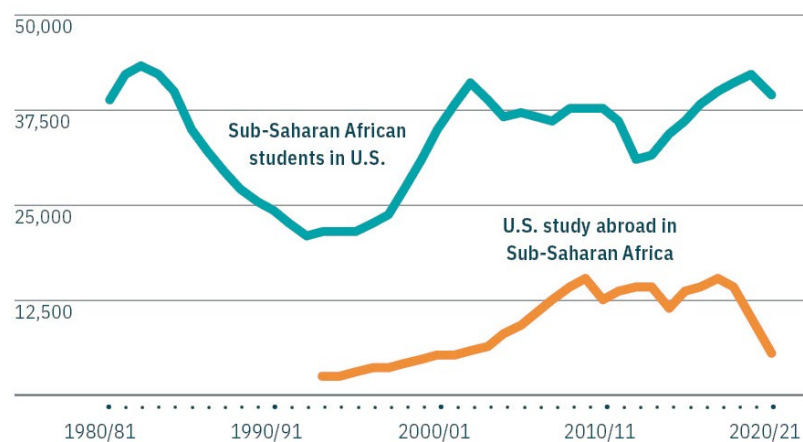
Despite the challenges presented by the COVID-19 pandemic, international education will continue in its many forms, with students interested in an education abroad and many countries eager to host them.

### Africa, Sub-Saharan

More than 39,000 students from Sub-Saharan Africa enrolled in U.S. higher education institutions in 2020/21, a decline of 6 percent from the prior year. Nigeria, the only Sub-Saharan African country among the top 25 places of origin, saw student numbers decrease by 7 percent in 2020/21 to 12,860 students. This represented a smaller percent change than the average for all international students at U.S. higher education institutions. The number of students from Ghana studying in the United States remained stable at more than 4,200 students for a second year. Additionally, the number of students from Kenya declined by only 6 percent in 2020/21. Most international students from Sub-Saharan Africa pursued degree programs, studying at the undergraduate and graduate levels, with fewer students participating in non-degree programs, which attributed to the lower overall rate of decline in the number of students from Sub-Saharan Africa.

The number of U.S. students in Sub-Saharan Africa in 2019/20 decreased by 60 percent to only 5,444 students. Student numbers declined to major African destinations known for hosting relatively large numbers of U.S. students, including Ghana (-63 percent), South Africa (-59 percent), and Tanzania (-55 percent).

Figure 1. Student mobility between the United States and Sub-Saharan Africa, 1980/81 - 2020/21



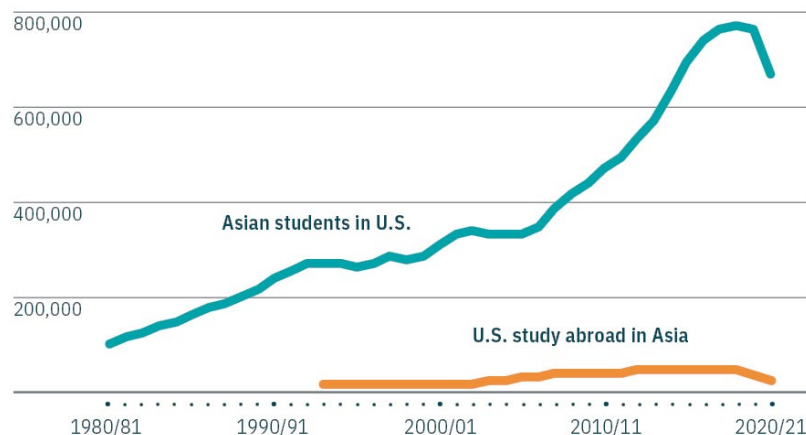
Source: Open Doors, 2021

## Asia

In 2020/21, postsecondary students across Asia accounted for 71 percent of all international students at U.S. higher education institutions. Students from China and India alone accounted for 53 percent of all international students. China was the leading place of origin for international students for the 12<sup>th</sup> consecutive year, despite a 15 percent decline. The number of South, Central, and Southeast Asia students declined by 13 percent, while the number of East Asian students declined by 16 percent. The number of Indian students in the United States declined for the second consecutive year, decreasing by 13 percent. Following a decade of steady increases, the number of students from Bangladesh remained stable (-3 percent), making Bangladesh the 14<sup>th</sup> largest place of origin. Japanese and South Korean student numbers fell sharply by 33 and 21 percent, respectively, driven primarily by canceled non-degree programs at U.S. higher education institutions, including exchange and IEP programs.

As the COVID-19 pandemic affected Asia earlier than other world regions, study abroad programs in Asia were among the first to be canceled during the 2019/20 academic year. The number of U.S. students who studied abroad in Asia declined by 64 percent to 14,792 students in 2019/20. Notably, study abroad in China fell by 79 percent, from more than 11,000 to just 2,481 students. Other leading hosts saw similar declines in U.S. study abroad, India (-48 percent), Japan (-62 percent), South Korea (-57 percent), and Thailand (-57 percent).

Figure 2. Student mobility between the United States and Asia, 1980/81 - 2020/21



Source: Open Doors, 2021

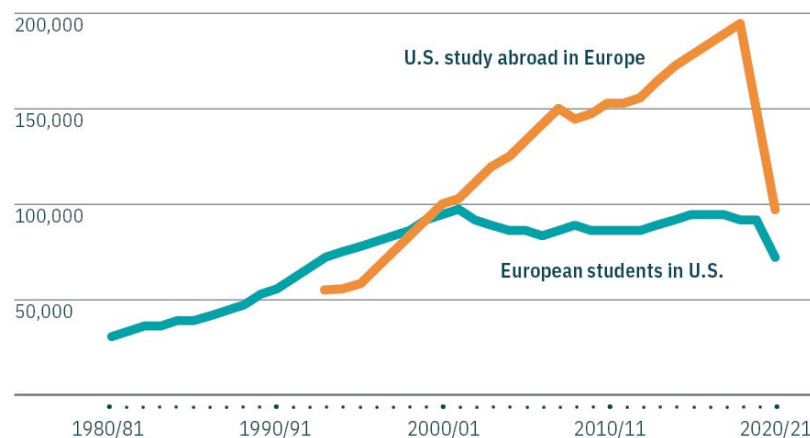
## Europe

A 24 percent decline in total international students from Europe was mainly driven by canceled non-degree programs throughout the United States. Before the 2020/21 academic year, 16 percent of European students who came to the United States participated in non-degree programs such as short-term exchange experiences or English Language programs. While the number of European students at undergraduate, graduate, and Optional Practical Training (OPT) academic levels declined by 10 to 15

percent, the total number of non-degree students from Europe dropped by 84 percent. The number of international students from top European countries, including France, Germany, Spain, and the United Kingdom, declined at higher rates than the 15 percent global average for all international students.

Europe continued to attract the majority of U.S. students who study abroad for academic credit, as reported by U.S. campus respondents to *Open Doors*. In 2019/20, 94,230 U.S. students studied in Europe, accounting for 58 percent of all U.S. study abroad. Study abroad to the region fell by 51 percent in 2019/20. Italy, Spain, and the United Kingdom hosted more than 19,000 U.S. study abroad students. In addition, eight other European destinations appeared among the leading hosts of U.S. study abroad for academic credit. Europe hosted the largest number of U.S. students pursuing full degrees abroad, with more than 30,000 students reported by IIE's *Project Atlas* partners in Germany, Italy, Poland, Russia, Spain, Sweden, and the United Kingdom for the 2019/20 academic year.

Figure 3. Student mobility between the United States and Europe, 1980/81 - 2020/21



Source: Open Doors, 2021

## Latin America and the Caribbean

Student mobility from Latin America and the Caribbean to the United States declined by 9 percent in 2020/21. A steeper decline in the number of students from Europe made Latin America and the Caribbean the second-largest regional sender to the United States after Asia. The number of students from the Caribbean, and Mexico and Central America declined slightly by 6 percent and 8 percent, respectively. The number of South American students also declined at a lower rate (-11 percent) than the global average. Proximity to the United States and similar time zones may have contributed to the lower rate of decline in the region as students studying from abroad could more easily attend synchronous online classes and activities. Brazil continued to lead the region in international student enrollments at U.S. higher education institutions. In 2020/21, 14,000 Brazilian students studied at U.S. colleges and universities, a 16 percent decline from the previous year. Among the other leading places of origin of international students in the region, the number of students from Mexico and Colombia declined by 10 and 9 percent, respectively. The number of students from Venezuela also dropped by 11

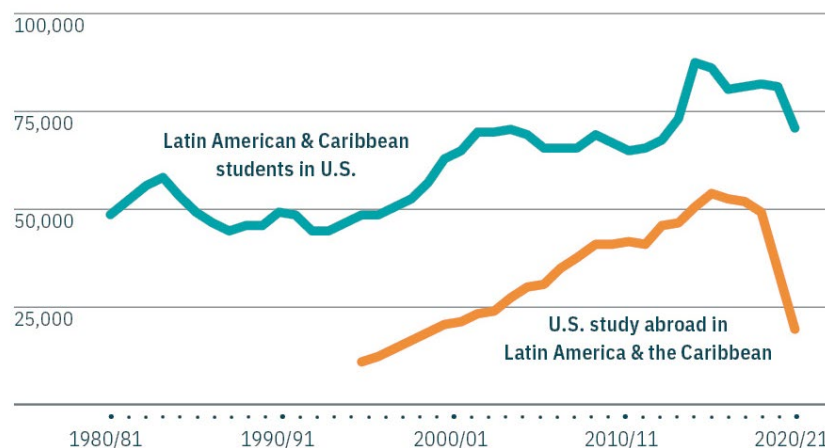


percent. All these countries had total declines lower than the global decline of international student totals of 15 percent.

Although Latin America and the Caribbean remained a popular region for U.S. students receiving academic credit for study abroad, 2019/20 marked the fourth consecutive year of decline in the number of U.S. students going to the region (-55 percent). Chile, Costa Rica, Ecuador, and Mexico, all leading destinations for U.S. study abroad students, saw a greater than 50 percent decline in U.S. study abroad, in line with the overall 53 percent decline for total U.S. study abroad. In contrast, study abroad to Argentina dropped by only 42 percent.

Latin America and the Caribbean continued to lead as a regional destination for U.S. students seeking non-credit learning abroad, including work, internship, volunteering, or research experience, with 40 percent pursuing non-credit learning in the region. In 2019/20, most students traveled to Mexico (10 percent), Guatemala (5 percent), Dominican Republic (4 percent), and Panama (3 percent) for these experiences.

Figure 4. Student mobility between the United States and Latin America and the Caribbean, 1980/81 - 2020/21



Source: Open Doors, 2021

## Middle East and North Africa

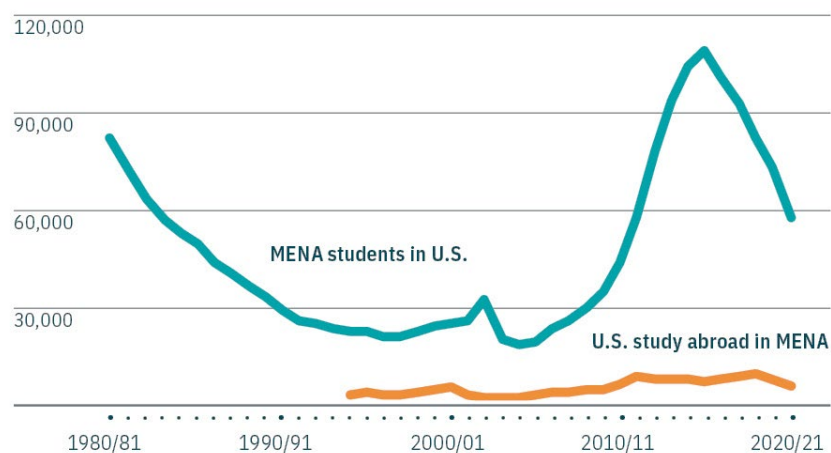
The Middle East and North Africa region accounted for 6 percent of the international students in the United States. Falling for the fifth consecutive year, international student enrollment from the Middle East and North Africa region fell 20 percent in 2020/21. Although the number of international students from the Middle East dropped by 22 percent, the number of North African students declined by only 10 percent.

Saudi Arabia alone comprised 38 percent of international students to the United States from the Middle East and North Africa region. In 2020/21, the number of students from Saudi Arabia declined 29 percent to 21,933. Multiple factors may be contributing to this significant drop in Saudi students at U.S.

institutions over the past few years, including COVID-19 travel restrictions, a suspension of new cohorts of the Saudi Arabian scholarship program, and continuing economic reforms impacting the middle class.

U.S. study abroad to the Middle East and North Africa accounted for only 3 percent of all study abroad in 2019/20. Israel, the region's top destination for U.S. students, declined by 46 percent. U.S. study abroad also declined to Jordan (-43 percent) and Morocco (-54 percent). The United Arab Emirates saw an increase of 20 percent, hosting 1,222 U.S. study abroad students in 2019/20, likely due to U.S. institutional partnerships in the region that enabled U.S. students to participate in study abroad programming at branch campuses.

Figure 5. Student mobility between the United States and the Middle East and North Africa, 1980/81 - 2020/21



Source: Open Doors, 2021

## North America and Oceania

In 2020/21, Canada became the fourth leading sender of international students to the United States, with 25,143 enrolled students, a three percent decline from the previous year. A consistent number of Canadian students studying at U.S. higher education institutions and a steadily declining number of Saudi Arabian students contributed to this change in position.

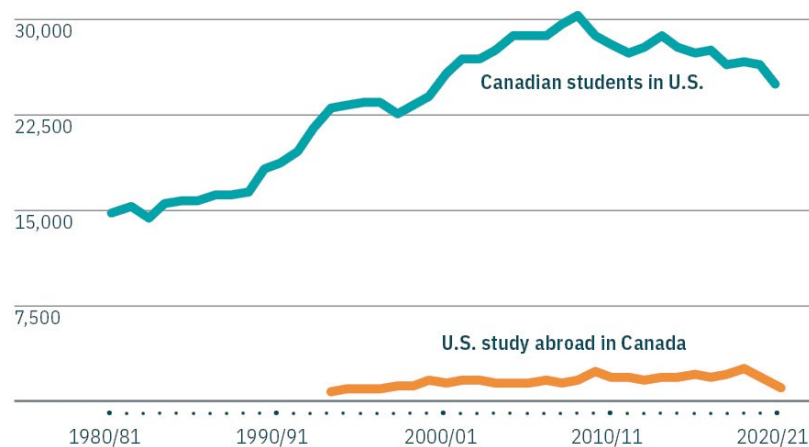
U.S. students receiving academic credit from their U.S. home campus for study abroad to Canada declined by 61 percent in 2019/20. However, Canada is a leading destination for U.S. students participating in non-credit work, internship, volunteer, or research experience, hosting more than 1,000 U.S. students for these activities.

Australia and New Zealand are the largest senders of international students to the United States and top hosts of U.S. study abroad students in the Oceania region. The United States hosted 5,864 students from Oceania in 2020/21, 88 percent of whom were from Australia (62 percent) or New Zealand (26 percent).

Lower declines in U.S. study abroad throughout Oceania (-25 percent) moved Australia to become the 5<sup>th</sup> largest host country for U.S. study abroad in 2019/20. New Zealand moved up six spots to become the 11<sup>th</sup> largest host. Together, these destinations hosted more than 11,000 students, accounting for 7 percent of study abroad in 2019/20. Additionally, 4,728 U.S. students pursued a full degree in Australia or New Zealand (*Project Atlas*, 2021).

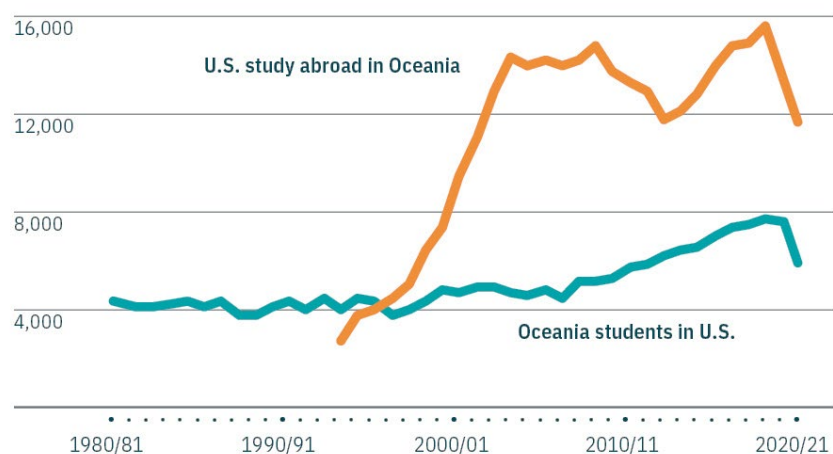
Anglophone countries in North America and Oceania continue to be among the top hosts of international students worldwide. The appeal of expansive program options, state-of-the-art education facilities, and practical training are among the reasons the United States, Canada, Australia, and New Zealand are popular destinations for international students.

Figure 6. Student mobility between the United States and Canada, 1980/81 - 2020/21



Source: Open Doors, 2021

Figure 7. Student mobility between the United States and Oceania, 1980/81 - 2020/21



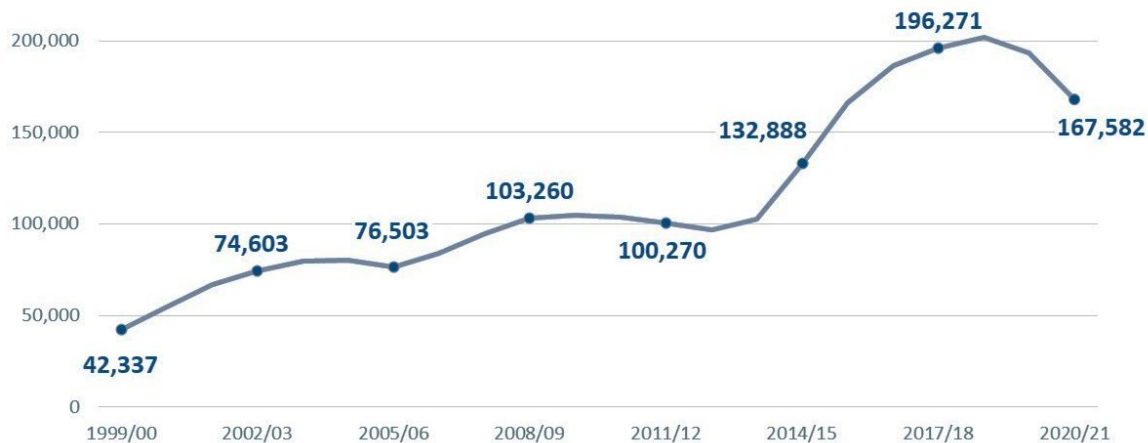
Source: Open Doors, 2021

## International Students from India and their Choices for Outbound Mobility

India was the second leading place of origin for students at U.S. colleges and universities in the 2020/21 academic year, with over 167,000 international students making up 18 percent of all international students pursuing studies in the United States (Open Doors, 2021).

One of the benefits of *Open Doors* is the ability to look at comparable data over time. A twenty-year trend line on international students coming to the United States from India shows that the number of international students doubled between 1999/00 and 2009/10 and then nearly doubled again over the past decade. Due to the COVID-19 pandemic, there was a decline of 13 percent in the number of Indian students in 2020/21.

Figure 8. International Students from India, 1999/00 - 2020/21



Source: Baer, 2021

The declines in Indian students were across all academic levels. Notably, the number of undergraduates fell by 5 percent, whereas the number of graduate students fell at a sharper rate of 19 percent. Approximately 39 percent of Indian students at U.S. colleges and universities pursued undergraduate studies, 36 percent graduate studies, and just over 1/5<sup>th</sup> – 22 percent— of students were on OPT.

Another interesting fact is the fields of study that Indian students pursued for their studies. While the science, technology, engineering, and mathematics, or STEM fields, were the most popular at the U.S. national level in 2020/21, with over 50 percent of students pursuing majors in these studies – there was an even higher proportion of Indian students pursuing STEM majors. Over three-quarters of Indian students – 78 percent – were studying in the STEM fields. The most popular STEM field for Indian students was math and computer science, with 35 percent of Indian students choosing this major, followed by 34 percent of students in engineering.

When Indian students travel to the United States, they pursue educational opportunities at colleges and universities across all 50 states. In 2020/21, the top five states hosting Indian students were New York, California, Texas, Massachusetts, and Illinois. This is very similar to the top five states hosting all international students – likely due to the large higher education systems and capacity within each state.

### International Students from South and Central Asia

Other countries in South and Central Asia complete the picture of student mobility from the region to the United States. Nepal, Bangladesh, and Pakistan were among the top 25 places of origin for international students at U.S. higher education institutions. Nepal was the twelfth place of origin of international students in the United States and sent over 11,000 international students in 2020/21. Over the years, there have been fluctuations in the number of Nepalese students with declines from 2008/09 through 2013/14, followed by strong growth beginning in 2014/15. There was an approximate 12 percent decline in students from Nepal in the last academic year. In comparison to India, a much higher proportion of Nepalese students pursued studies at the undergraduate level – 48 percent, with an additional 33 percent studying at the graduate level.

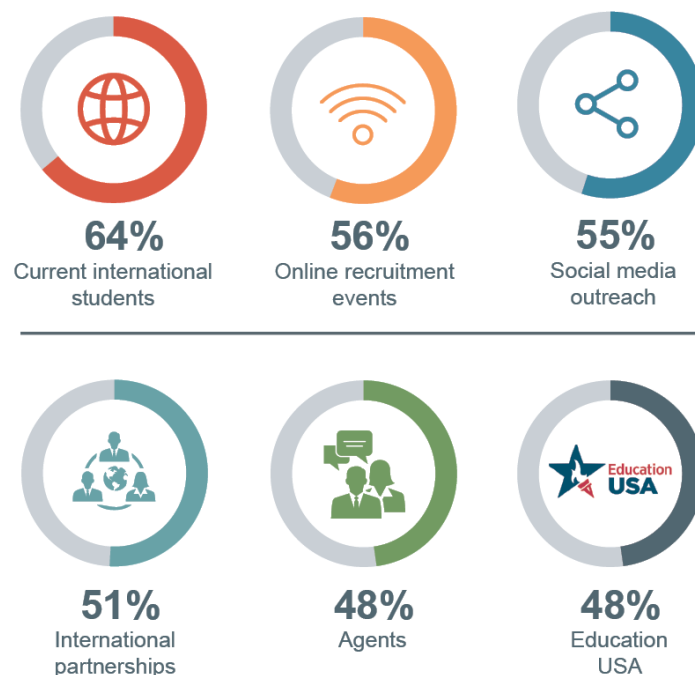
Bangladesh was the 14<sup>th</sup> leading place of origin among international students studying in the United States. Bangladesh experienced significant growth over the past decade, with the number of students from Bangladesh more than tripling between 2009/10 and 2019/20. In the most recent year, there was a slight decline of approximately three percent, which was much lower than the national average of 15 percent. The majority of students from Bangladesh pursued graduate studies in the United States.

### Outreach and Recruitment Trends for Indian Students

India has been a top international student market in recent years, with hundreds of thousands of students traveling to top universities globally. COVID-19 disrupted students' mobility plans and impacted numbers over the last two years. However, as rebounds of student mobility are noted worldwide, there is a noticeable increase in the number of students from India keen to travel to study once again. Simplification of visa regulations and other attractive offers from various international destinations are a bonus. The number of Indian students studying overseas could increase considerably in the coming years.

Data from IIE's *Fall 2021 Snapshot on International Education* indicates that U.S. colleges and universities continue to prioritize outreach and recruitment of international students, focusing on India as a top place of origin for recruitment. Despite the challenges caused by the pandemic, institutions are continuing to conduct outreach and recruitment of international students: Over half of all reporting U.S. colleges and universities leveraged current international students (64 percent), online recruitment (56 percent), social media (55 percent), and other resources to support outreach and recruitment.

Figure 9. Resources Leveraged for International Recruitment



Source: Fall 2021 International Student Enrollment Snapshot

There has also been a paradigm shift in the demographics of Indian students who aspire to study abroad. In recent years, smaller towns and cities such as Vijaywada, Warangal, and Tirupati, known as Tier 2 and Tier 3 cities, are the points of origin yielding large numbers of prospective Indian students wishing to study overseas. There is a huge appetite for high-quality international education and a desire for international employability and mobility. This trend is likely to continue as the youth bulge in India continues to grow, not just in the capital cities but across the country.

Regarding foreign destinations, the United States, the United Kingdom, Canada, and Australia remain popular. Still, there is a palpable shift as other options like Germany, Italy, China, Russia, Turkey, and Ireland have also been attracting Indian students in significant numbers. Competition has resulted in various countries relaxing their rules and being more welcoming than ever before with financial, logistical, and other avenues of assistance and support. This augurs well as it implies that the main beneficiaries, the students themselves, are once again becoming the focus of the education business.

#### Competition for International Students from India

According to a report by RedSeer called the “Higher Education Abroad Market,” the number of Indian students studying outside India was 440,000 in 2016 and rose to a high of 770,000 in 2019. The figure is anticipated to go up to 1.8 million by 2024, with the total expenditures of Indian students funding their education abroad approaching \$80 billion (RedSeer, 2021).

During the recent Indian Student Visa Day at the United States Embassy in India, Consul General David G. Ranz noted, “Students are a big business for the United States, with Indian students contributing more than \$8 billion a year... Last year we issued a record 100,000 visa applications to Indian students, which might double that number in 2022 according to our numbers” (BUILA, 2022). Efforts of the U.S. Embassy in India have been to simplify the visa process and to expedite visa appointments and issuances. “Student mobility and the people-to-people connections it forges have been a cornerstone of the U.S.-India relationship for the past 75 years and remain so today,” shared Patricia Lacina, Charge D’Affaires at the U.S. Embassy in India (BUILA, 2022). The encouraging number of U.S. study visa approvals for Indian students indicates a positive outlook for Indian prospective students.

The United Kingdom may be another top destination for Indian students post-pandemic, as the UK “is expected to see an almost 600 percent jump in Indian students this year compared to 2019” (Singh, 2022). While the UK had 36,000 students from India in 2019, there is expected to be a total of 250,000 students from India going to the UK in 2022 (LeverageEdu, 2022). The UK has witnessed a positive trend following the challenges of the pandemic. Between 2019/20 and 2020/21, there was an increase of 52 percent in the number of Indian students in the UK (as per ApplyBoard).

There is also an anticipated surge in Indian visa applications to Australia now that the Australian borders have opened. LeverageEdu estimates 150,000 students will head to Australia compared to 180,000 in 2019 and 150,000 in 2018 (2022).

Canada’s Post Graduate Work Permit Program (PGWPP) is a welcome opportunity for international students to stay and work following their international degree program. This has been a significant draw for Indian students to Canada. More than 70,000 PGWPP approvals were issued in 2020 (Singh, 2022). Between 2015/16 and 2019/20, the number of Indian students studying in Canada increased by 350 percent (ApplyBoard, 2022).

“According to government data, we watched the pandemic’s international student inflows to Canada and the U.S. fall considerably in 2020. However, interest has rebounded in Canada, and early signs suggest a similar rebound in the U.S. as well,” said Karunn Kandoi, general manager and head of India operations at education technology platform ApplyBoard (Singh, 2022).

As reported recently in the Economic Times in April, Indian students are increasingly interested in higher education institutions and countries that will help them secure work and employment opportunities (2022). Fields of study also vary by destination. “While 44 percent of Indian students in the UK and 37 percent in Canada opted for business studies, the U.S. is the first choice to study STEM courses. In 2020-21, 78 percent of Indians studied STEM programs in the U.S. It was the third-highest rate among the top 25 countries to study” (Economic Times, 2022).

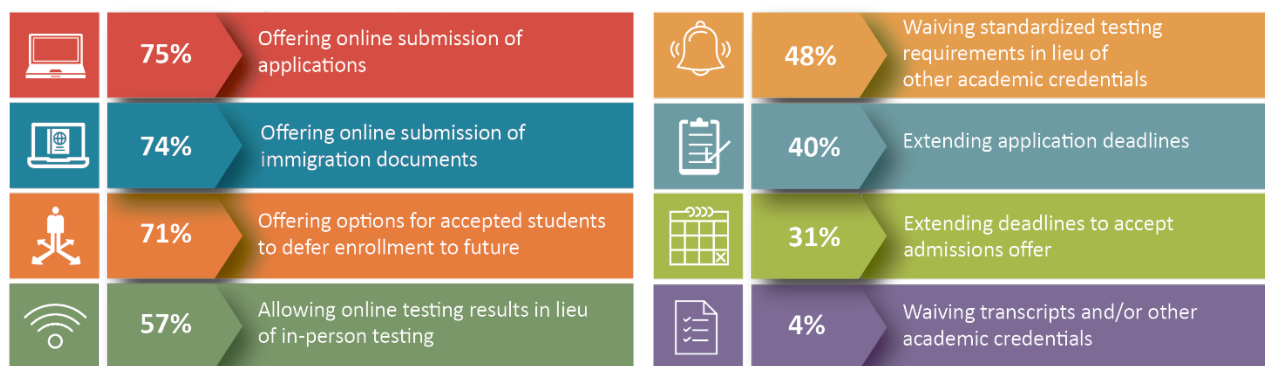
It is clear that as prospective Indian students weigh their options regarding international study, they will have ample choices available to them. And with pent-up demand from two years of the COVID-19 pandemic, there is no indication that the India international student market is slowing.

## What Have U.S. Institutions Learned amid COVID-19?

The COVID-19 pandemic caused an unprecedented change in international higher education, prompting U.S. institutions to rethink their processes and approaches. As we look forward to rebounding international student mobility, many students will be again inquiring about the application and selection processes at U.S. higher education institutions and other universities worldwide. In the *COVID-19 Snapshot Survey Series*, IIE asked institutions to reflect on the changes they experienced in the last year and to identify approaches, processes, or decisions that they will retain in their future work.

The application and selection process was redefined during the COVID-19 pandemic, prompting institutions to innovate within many process elements. While some measures started of necessity due to the pandemic, institutions noted that they would retain many of these adjustments moving forward. In some cases, the pandemic created an opportunity for institutions to develop a more streamlined approach, revise how they evaluate students, and increase communication with applicants.

Figure 10. Flexibility in Application and Selection for International Students



Source: COVID-19 Snapshot Survey Series, 2021

Most institutions indicated the development of updated processes for online submissions, both applications (75 percent) and immigration documents (74 percent). More than half of institutions (57 percent) also noted allowing online testing instead of in-person testing. Finally, almost half of institutions (48 percent) reported waiving standardized testing requirements in place of other credentials. These findings were across institutional types. At the same time, there was a decidedly lower uptake of waving transcripts or other academic credentials. The need to offer student deferrals in the selection process and extend application deadlines and admissions offers have been great.

## Conclusion

These lessons are only the beginning of the research needed to understand the long-term impacts of COVID-19 on international educational exchange. Will new priorities emerge for international



education? How long will external factors related to COVID-19 persist and require further planning, consideration, and strategy? Will the advent of online learning during this time continue with students studying remotely? And what will the priorities of international students, including those from India, be in shaping the future of international educational exchange? These outstanding questions are areas that institutions in the United States and worldwide will continue to grapple with over the coming years as institutions, and students, learn, adapt, and plan for the future.

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## About IIE

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.

## The IC3 Movement

The IC3 (short form for International Career and College Counseling) Movement, with its mission to bring counseling in every school, is at its core, dedicated to helping young people across the globe find career paths through education that will lead to fulfilled, happy and productive lives. Comprising four key, volunteer-driven initiatives – the **Annual IC3 Conference**, **IC3 Regional Forums**, **IC3 Live**, and the **IC3 Institute** – the IC3 Movement aims to empower every school to run a robust, fully functioning, career and college counseling department. **[ic3movement.com](http://ic3movement.com)**



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