



March 2024

Outlook 2030 Brief

The U.S. and International Education

Allan E. Goodman & Mirka Martel



The Power
of International
Education

By 2030, the number of internationally mobile students will grow from 6 million in 2023 to over 10 million. As much as one-fifth will aim to come to the United States.

The increase is being driven by shortages of higher education capacity in many countries in Africa, Asia, the Middle East, and South America, with large college-age and college-ready youth populations seeking higher education opportunities beyond their countries' borders. This is coupled with the dynamics of worldwide refugee populations containing an unprecedented number of 18–24-year-old students who have been able to complete secondary school and are actively searching for higher education.

For over a century, the United States has been the leading destination for international students. Unlike higher education systems elsewhere, the U.S. maintains a decentralized public and private tertiary education system where international students may apply and enroll at the state, city, and local levels. This makes America the only country with so many accredited institutions of higher education open to international students. Simultaneously, we are facing a growing shortage of our own citizens to enroll.

Today, international students account for the U.S.'s fifth-largest export industry, and over 368,000 jobs are associated with ensuring international students receive the advising and other services to make their educational sojourn in the U.S. successful. Official pronouncements from the Departments of Commerce, Education, and State confirm America's commitment to remaining the leading destination.

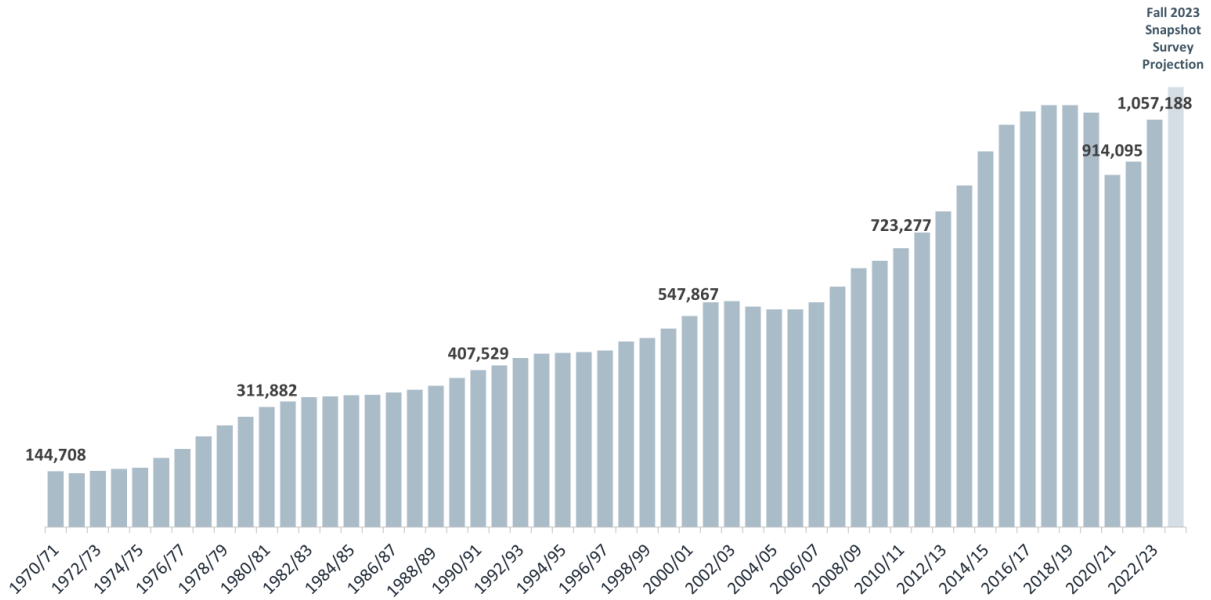
In the years ahead, we will offer an annual brief documenting key trends in academic mobility to the United States, comparing annual findings to our projections, and suggestions for campus planning to accommodate the anticipated growth in international students.

Key Trends in Academic Mobility

1. International student numbers in the United States are growing.

International students have traveled to the United States for over a century to pursue academic study and post-study practical training, expanding their horizons and contributing to U.S. colleges and universities with their global perspectives and knowledge. According to the [Open Doors® Report on International Educational Exchange](#), which has reported on international student mobility to the United States since the 1950s, student flows to the U.S. have expanded rapidly, growing from just 144,708 students in 1970/71 to **1,057,188 students in 2022/23**.

In the last two years, international student totals have increased by 4 percent in 2020/21 and 12 percent in 2022/23. Forecasts indicate 8 percent growth in the 2023/24 academic year ([Fall 2023 Snapshot on International Student Enrollment](#)). Throughout IIE's history of collecting this data, and the twelve pandemics that have taken place, these are the highest recorded rebounds.

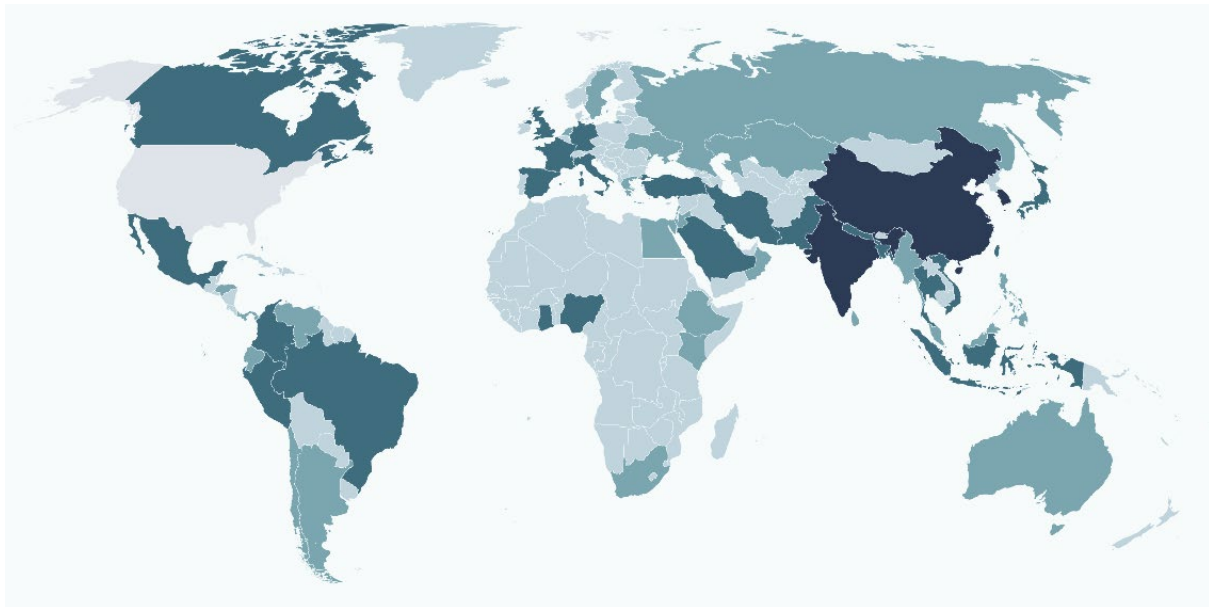


International Student Mobility to the United States

Sources: *Open Doors*, 2023; *Fall Snapshot Survey*, 2023

2. International students come from every world region.

International students study in the United States from over 210 places of origin, representing every world region. In the 2022/23 academic year, *Open Doors* reported that most places of origin experienced rebounds following the COVID-19 pandemic, and 8 places of origin among the top 25 saw international student totals at all-time highs: Bangladesh, Colombia, Ghana, India, Italy, Nepal, Pakistan, and Spain. China and India continued to be the top two places of origin for international students, with 52 percent of all students coming from these two countries.



International Students by Places of Origin

Source: *Open Doors*, 2023

3. U.S. colleges and universities want to host more international students.

U.S. colleges and universities have the capacity and desire to host more international students. In the [Fall 2023 Snapshot on International Student Enrollment](#), 92 percent of institutions noted their desire to increase their international student enrollment. And 85 percent of institutions indicated that financial support for their international student recruitment efforts was the same or higher than in the previous year. To increase capacity, institutions noted the need to hire additional support services staff, expand student housing, and add majors.



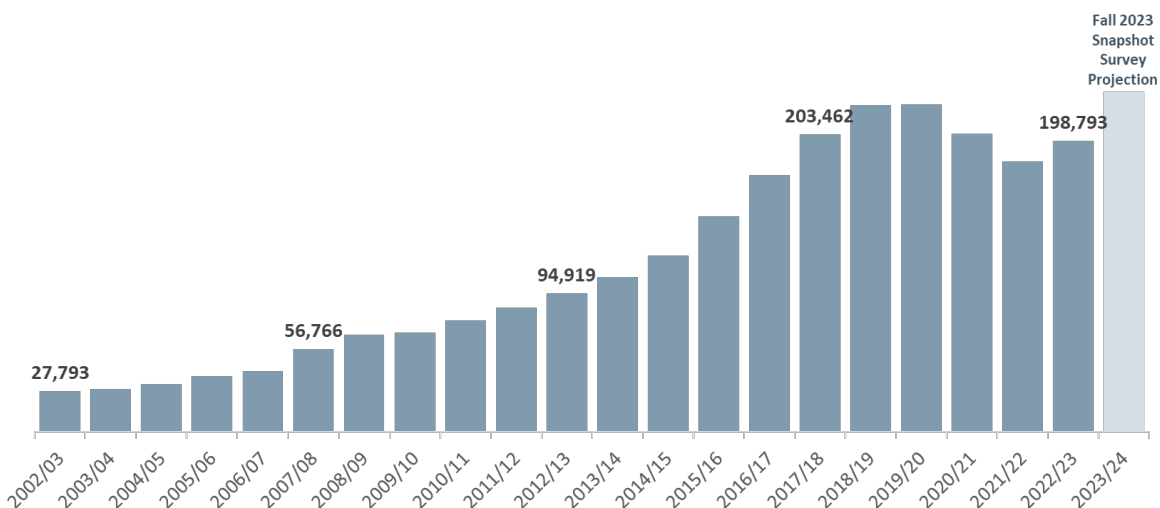
Source: Fall Snapshot Survey, 2023

The U.S. higher education system is facing an unprecedented enrollment cliff for its domestic students. Since 2010, total undergraduate enrollment has decreased by [almost two million students or 10 percent](#). As the U.S. birthrate declines further, projections anticipate a [15 percent decline in college enrollment after 2025](#). U.S. colleges and universities can focus on international students as a possible pipeline to increase enrollment given this anticipated drop in domestic student numbers.

4. International students are important for the U.S. economy and jobs.

According to NAFSA, international students contributed over [\\$40 billion to the U.S. economy in the 2022/23 academic year](#), and over half of these students contributed non-U.S. funding, particularly personal funds, to fund their education according to *Open Doors*. The financial contributions of international students also contributed to over 368,000 jobs in the United States, up by close to 10 percent compared to the prior year ([NAFSA, 2023](#)). The same report indicated that every three international students created or supported one U.S. job and that 9 states in the United States saw economic benefits from international students exceed \$1 billion. Contributions by international students at community colleges rebounded after four consecutive years of decline, with increases of approximately 17 percent.

Upon graduation, international students also gain practical work experience through Optional Practical Training (OPT) for up to three additional years, learning and contributing to America's excellence in the arts, industry, science, and healthcare. The total number of students on OPT grew by 8 percent to 198,793 students in 2022/23 according to *Open Doors*. This turnaround ended two years of declines among students pursuing OPT amid the COVID-19 pandemic. The *Fall 2023 Snapshot* anticipates that in the 2023/24 academic year, OPT will experience another increase. As the incoming classes of new international students, particularly graduate students, continue to increase, the number of OPT students will likely continue to grow.

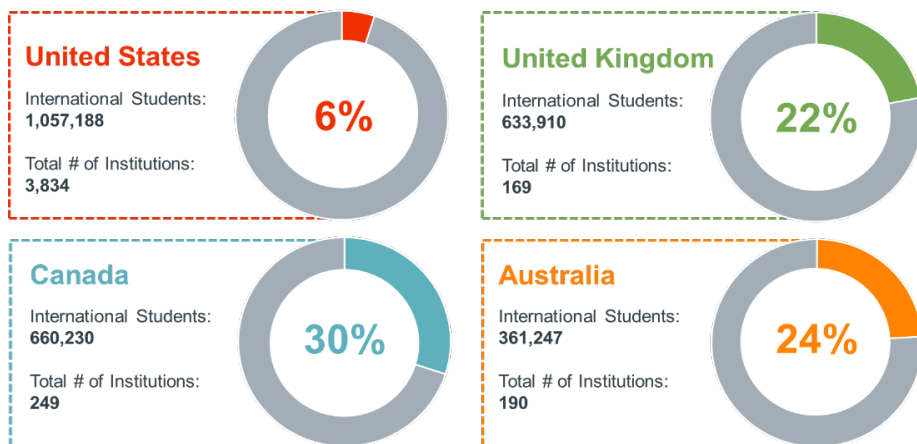


Optional Practical Training (OPT) in the United States

Sources: *Open Doors*, 2023; *Fall Snapshot Survey*, 2023

5. Other top host destinations are running out of capacity to host international students.

Competition for international students has been growing. However, it is important to note where the capacity for more international students is the greatest. In many top hosts, including the United Kingdom and Canada, the capacity to host international students has reached 22-30 percent and has triggered discussions of limits to additional growth. In 2023, international students comprised just 6 percent of all U.S. higher education enrollment.



International Students as a Percentage of Total University Enrollment

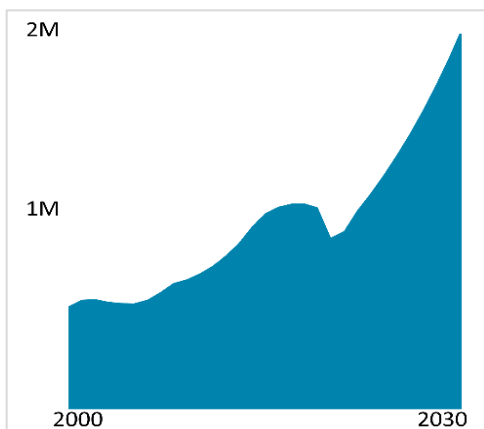
Source: *Project Atlas*, 2023

With almost 4,000 higher education institutions, the United States has the greatest capacity to host international students. And in 2022/23, the top 100 institutions hosted 57 percent of all international students (*Open Doors*). Expanding the capacity of U.S. colleges and universities to host international students will ensure that campuses are prepared to increase enrollment from abroad.

Forecast 2030

Three Scenarios for International Enrollment Growth

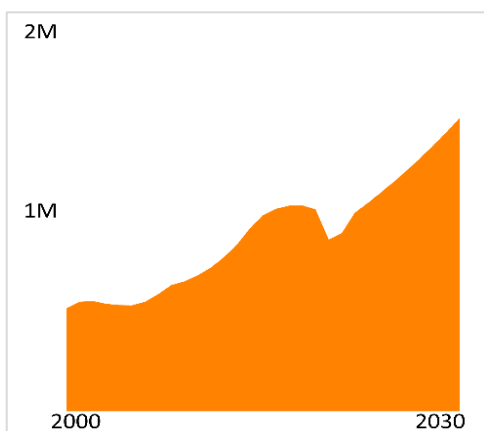
U.S. colleges and universities could enroll 2 million international students by 2030. Using historical trends in global student mobility flows from *Open Doors* and comparable research by [HolonIQ](#), we present three growth scenarios through 2030.



ROBUST GROWTH (2 million)

Average annual growth of 8 – 10%

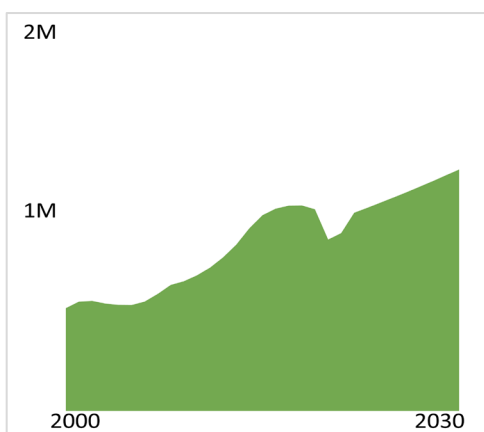
This scenario indicates sustained growth of 8 - 10% as noted in the last two years following the COVID-19 pandemic. It is the trend we experienced in 2022/23 and forecast in 2023/24.



STEADY GROWTH (1.7 million)

Average annual growth of 5 - 7%

This scenario maps steady growth through 2030 that matches the average annual growth rate of globally mobile students in the past 20 years per UNESCO.



SLOWED GROWTH (1.3 million)

Average annual growth of 2 - 3%

Following a post-COVID surge, this scenario forecasts a slowdown in student mobility to the United States to growth patterns just prior to the COVID-19 pandemic.

Where will international students come from?

By 2030, tertiary-age populations in many developing countries throughout Africa, Asia, the Middle East, and South America will expand. Throughout these regions, local higher education capacity will not keep up with the total demographic surge, producing a shortage of available spaces to pursue higher education. As a result, students will continue to seek education options beyond their countries' borders.

10 Emerging International Student Markets to Watch

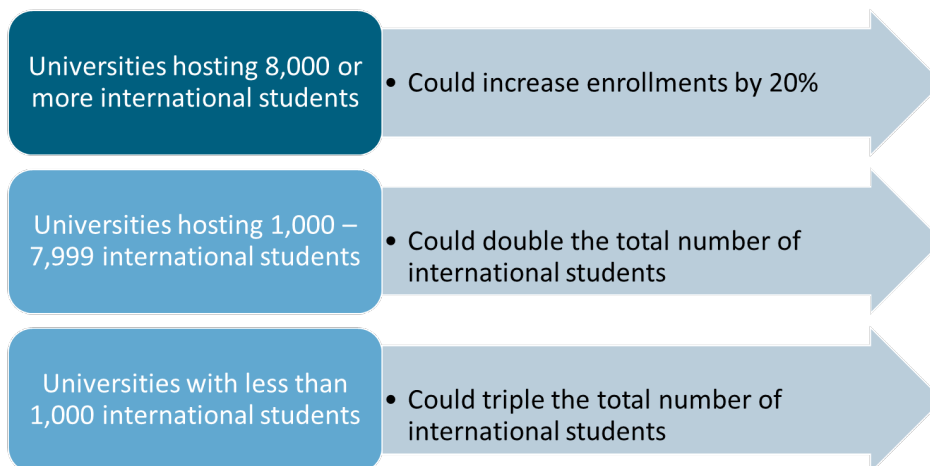
Place of Origin	Potential Year-on-Year % Growth by 2030
Bangladesh	11 - 15%
Brazil	7 - 11%
Ghana	12 - 17%
India	10 - 14%
Iran	10 - 14%
Mexico	8 - 12%
Nepal	12 - 16%
Nigeria	12 - 16%
Pakistan	10 - 14%
Vietnam	6 - 10%

Refugee and displaced students attending international higher education in the United States are another potential source of diverse and talented students. With more than 110 million people forcibly displaced worldwide, universities stand to gain remarkably driven refugee students. Many U.S. colleges and universities are already providing generous financial aid to welcome them.

Where will international students go?

The United States has the greatest capacity to host international students than other destination countries. To expand international student enrollments across U.S. colleges and universities, growth should happen across all types of institutions. With 100 higher education institutions hosting over half of the total international students currently, more institutions need to increase their totals across the country, providing opportunities for growth across institutional types and programs. Across the industry, 500 additional U.S. higher education institutions could also begin hosting international students.

By 2030...



What is Being Done

Stakeholders across the U.S. government, higher education, and international organizations continue to prioritize growth and support for international students in the United States.

- The U.S. Departments of State and Education announced the [Joint Statement of Principles in Support of International Education](#), joining forces to discuss the importance of international students in the United States. The addition of international education as part of the [U.S. Export Strategy](#) has provided further support from the U.S. Department of Commerce.
- The U.S. government has issued visas at some of the highest rates post-pandemic in 2023, including increasing visa rates to international students from India and South Asia. U.S. Consular Services are supporting resources for potential visa increases.
- The [EducationUSA Network](#) continues to provide advising services across over 430 advising centers in 175 countries to support international students in their journey to U.S. academic study.
- U.S. colleges and universities are prioritizing outreach and recruitment to international students, with 89 percent noting that 2023/24 applications are up from the previous year ([Spring 2023 International Student Enrollment Snapshot](#)).
- U.S. colleges and universities are prioritizing undergraduate recruitment in India (70%), Vietnam (66%), China (53%), South Korea (53%), and Brazil (49%). For international graduate students, the top recruitment places of origin include India (80%), China (46%), Vietnam (42%), and Nigeria (40%). Institutions are also recruiting international students already enrolled in undergraduate programs into graduate programs ([Fall 2023 Snapshot](#)).
- U.S. and international non-governmental organizations are working together to promote the importance of international student mobility in the United States through the [U.S. for Success Coalition](#), with IIE as a founding member.
- IIE is also [collaborating with the American Council on Education](#) (ACE) to co-design programmatic offerings that will address escalating challenges in higher education internationalization and serve the evolving internationalization needs of diverse higher education institutions.

Ingredients for Success

To ensure success in growing international student numbers in the United States, several factors are critical. Universities will need to make internationalization a top priority and make investments in key areas.

- **Prioritize internationalization at the highest levels.** The realities of the enrollment cliff and the financial pressures on U.S. colleges and universities of all types mean that institutions should focus their institutional strategy at the highest levels on internationalization. Increasing enrollment of international students is an ingredient for success that, if a priority, will promote the well-being of institutions of all types. At leadership levels, focusing on international student recruitment,

partnerships, and other opportunities to internationalize should be a priority.

- **Incorporate internationalization into diversity strategy.** Higher education institutions of all types are focusing on fostering diversity on their campuses. The international perspectives of students from over 210 places of origin are key to fulfilling these goals.
- **Increase housing and support services.** Expanding student numbers in some institutions will require further focus on housing and international student support services. *Open Doors* data and other resources are critical to identifying trends of the types of students coming to the United States, their needs, and priorities. Services such as housing, mental health support, and other academic services will continue to be important success factors for students to choose the United States as their study destination.
- **Recruit in a broad range of international student markets.** Many institutions are moving beyond China and India to other key markets, including Vietnam, Nigeria, and Brazil, that have strong connections to the U.S. higher education market. Institutions looking to move beyond the top two places of origin should consider prospective students' interests and fields of study, and whether they are a good match for their institution.
- **Consider financial support and options for international students.** International students are becoming more cost-conscious and institutions should consider offering financial options. U.S. institutions already offer tuition at various price points, and institutions can continue to do more to show international students that they are interested in their enrollment. Prospective students are applying to more campuses than ever before, and financial incentives are important to consider given the cost of U.S. higher education.
- **Advocate and support efforts to increase student visas.** Advocacy and resources for the U.S. Consular Service will be critical to increasing the issuances of international students in key countries. U.S. colleges and universities should let their Senators and Representatives know now that more Consular Officers will be needed worldwide, especially in the top prospective sending countries. Support for students' preparation of their visas, their visa process, and advocacy for more support from the U.S. government ensures that students who are accepted to U.S. colleges and universities will also be able to obtain a visa and make their successful journey to study.



Institute of International Education • iie.org

Established in 1919, IIE is a global not-for-profit that creates and implements international education programs, conducts research, and provides life-changing opportunities for students and scholars worldwide.

