Spring 2024 Snapshot

ON INTERNATIONAL EDUCATIONAL EXCHANGE

Mirka Martel, Ph.D.

iie The Power of International Education

Spring 2024 Snapshot on International Educational Exchange

Mirka Martel, Ph.D.

About IIE

As an independent, 501(c)(3) not-for-profit founded in 1919, the mission of the Institute of International Education (IIE) is to help people and organizations leverage the power of international education to thrive in today's interconnected world. IIE's work focuses on advancing scholarship, building economies, and promoting access to opportunity. IIE publications and white papers can be found at https://www.iie.org/Research-and-Insights/Publications.

Table of Contents

Introduction 3
Key Findings 4
International Student Applications at U.S. Colleges and Universities 5
Looking Ahead: International Student Recruitment for Future Years 7
  Undergraduate Recruitment 8
  Graduate Recruitment 9
U.S. Study Abroad 11
Conclusion 15

Introduction

This year's *Spring 2024 Snapshot on International Education Exchanges* provides key updates to academic mobility trends across the U.S. higher education landscape at the end of the 2023/24 academic year. Since 2005, the Institute of International Education (IIE) has released a snapshot report each fall on international enrollment trends at the start of the academic year.[i] During the COVID-19 pandemic, we expanded our analysis with the *COVID-19 Snapshot Survey Series,* which provided additional analysis in the spring. Now in its third year, the *Spring Snapshot on International Educational Exchange* series includes insights on international students and U.S. study abroad.

This report presents data from 662 U.S. higher education institutions in two sections: (1) current trends in international student applications in the 2024/25 academic year and recruitment patterns for prospective students and (2) the realities of U.S. study abroad in 2023/24 and looking ahead to 2024/25.

Each section is supplemented with special analyses by institutional type. The *Snapshots on International Educational Exchange* complement the *Open Doors® Report on International Educational Exchange*, which IIE conducts in partnership with the U.S. Department of State.[ii] As the Snapshot Surveys represent a subset of the institutions surveyed by *Open Doors*, the complete picture of international student enrollment and U.S. study abroad is also reported each November by IIE in the *Open Doors Report on International Educational Exchange*.

Survey Respondent Institutions

IIE administered the Spring 2024 Snapshot Survey from June 17 to July 13, 2024. We sent the survey to more than 2,700 U.S. higher education institutions, and 662 institutions submitted responses. The Spring 2024 Snapshot respondents' profile closely mirrors the profile of institutions that completed the latest *Open Doors* report. Similar proportions are noted among geographic regions, institutional sectors and types (Figures 1 and 2).

Figure 1: Institutional sector

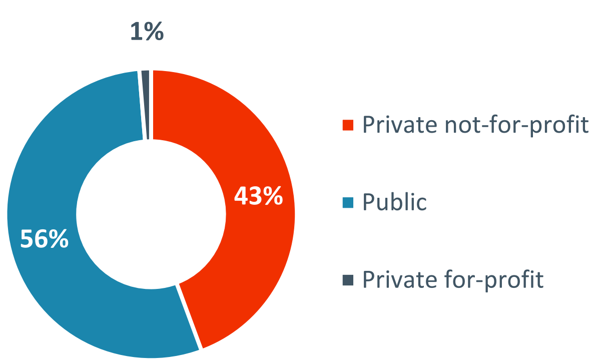
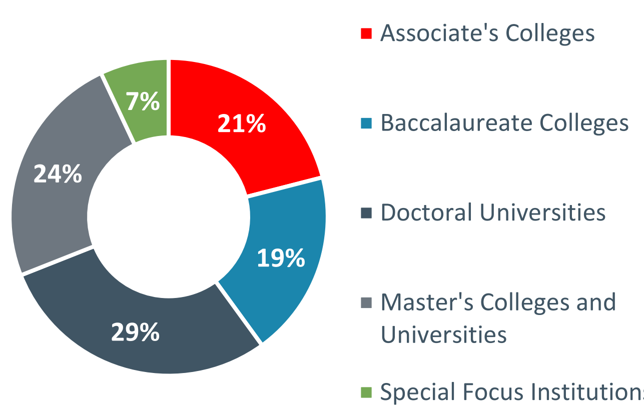


Figure 2: Institutional type



Key Findings

The *Spring 2024 Snapshot on International Educational Exchange* focuses on the current state of in-person student mobility to and from the United States and supporting the diverse population of students participating in global exchange.

International Student Applications Continue to Increase

- 53% of U.S. colleges and universities indicated that 2024/25 international applications were up compared to the previous year, while 30% indicated that numbers stayed the same.
- Notably, 61% of Associate's colleges, or community colleges, noted an increase in international student applications, while only 7% noted a decrease. Similarly, 58% of Master's colleges and universities noted an increase, while 16% noted a decline. The institutional types that indicated more significant decreases in international applications included Doctoral universities (26%) and Special Focus Institutions (23%).
- Institutions recruiting undergraduate students for future years are prioritizing students from India, Vietnam, China, Canada, and South Korea.
- Most institutions recruiting international graduate students are focusing on India (66%), outpacing recruitment in other places of origin. China, Vietnam, and Nigeria are also strong markets where colleges and universities are conducting outreach.
- Most institutions are focusing on engaging current international students to support their recruitment efforts. Other popular outreach methods include social media, alumni, and global partnerships.

U.S. Study Abroad Looks Beyond Europe

- Most U.S. colleges and universities (94%) anticipate increased or stable student participation in study abroad in the forthcoming 2024/25 academic year. This builds upon the growth noted in 2022/23 and 2023/24 following the declines during the COVID-19 pandemic.
- While most institutions continue to focus on destinations in Europe, nontraditional markets are returning as a priority: Argentina, Australia, Costa Rica, Japan, Mexico, and South Korea.
- Over half of all study abroad programs in 2023/24 were faculty-led (55%).
- Nearly half of the responding institutions (45%) are prioritizing sustainability measures in their study abroad programming, including 17% that offer virtual exchange options and 17% that have a sustainability plan.

International Student Applications at U.S. Colleges and Universities

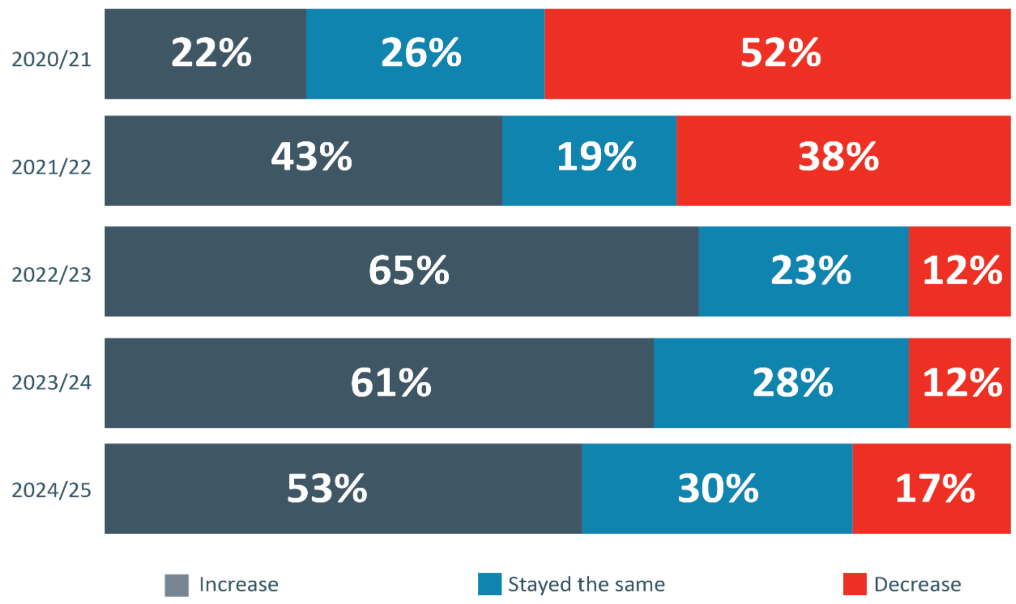
International student application numbers continue to reflect an upward trend, with 83% of U.S. colleges and universities indicating that 2024/25 applications are up or have stayed the same compared with the previous year.

International student applications for the 2024/25 academic year continue to increase.

In advance of the 2024/25 academic year, 53% of institutions reported that their application numbers were higher than the previous year, 30% reported that numbers stayed the same, and 17% reported a decrease (Figure 3). Most importantly, we found that increases were evident across all institutional types and academic levels, including undergraduate, graduate, and non-degree.

Most notably, 61% of Associate's colleges, or community colleges, noted an increase in international student applications, while only 7% of these institutions noted a decrease. Similarly, 58% of Master's colleges and universities noted an increase, while 16% noted a decline. The institutional types that indicated larger decreases in international applications included Doctoral universities (26%) and Special Focus Institutions (23%). As Doctoral universities host the largest proportion of international students nationwide, monitoring

Figure 3: International student applications, 2020/21 – 2024/25



conversions from applications to international student enrollments in the 2024/25 academic year will be important.

The largest application increases were reported from Ghana, Nepal, India, Nigeria, and Bangladesh.

The *Spring 2024 Snapshot* indicates continued and steady flows of international students from Asia, Europe, Latin America, the Middle East, and Africa to the United States in the coming academic year.

Most respondent colleges and universities indicated increased international student applications from Ghana, Nepal, India, Nigeria, and Bangladesh (Figure 4). This provides an initial look into possible increases across these places of origin in the 2024/25 academic year.

Figure 4: Institutional increases in international student applications by place of origin

Bangladesh 40%	Brazil 30%	Canada 36%
China 26%	Colombia 22%	Ghana 62%
India 47%	Iran 28%	Japan 20%
Mexico 24%	Nepal 53%	Nigeria 46%
Pakistan 37%	UK 23%	Vietnam 38%

Focusing more specifically on the top two places of origin as reported in *Open Doors* 2023, 26% of institutions noted increases in Chinese applicants, and 47% reported increases in Indian applicants. It is important to note that while international student applications may be an early indicator of inbound mobility trends, students often complete applications for several institutions, and thus, conversions to international enrollments will capture the actual changes for these places of origin.

Most international students will be studying on campus in 2024/25.

Almost all reporting institutions (97%) plan to offer international students in-person study in the United States. This is in line with the desires of international students, as many prefer in-person study for their U.S. experience.[iii] At the same time, with the realities of visa delays and other travel-impeding factors, including COVID-19, we asked institutions what options they will offer international students admitted to their campus who may not be able to arrive on campus by the start of the semester.

Approximately half (52%) of institutions noted offering students deferment to spring 2025, while only 26% noted that they would offer online enrollment to international students until they could come to campus. Given updated SEVP guidance for in-person study for international students,[iv] it is unsurprising that institutions are less likely to offer online enrollment to international students, even in the short term.

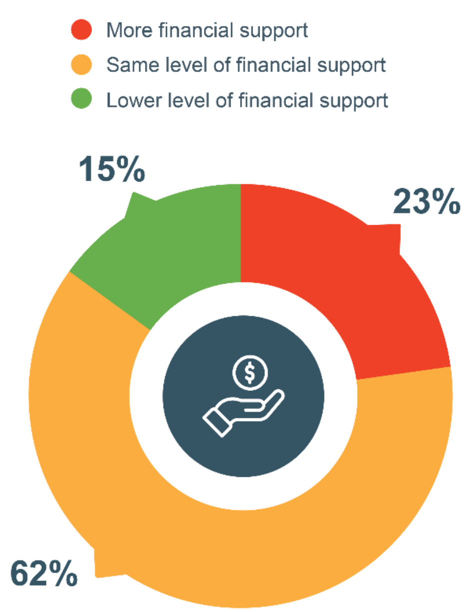
Looking Ahead: International Student Recruitment for Future Years

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

Funding for prospective international student recruitment remains stable.

U.S. institutions continue to invest significant resources in international student recruitment. As of fall 2023, most colleges and universities (85%) reported that financial support for student recruitment efforts was the same or higher than in the previous year (Figure 5).[v] This level of engagement was noted across all responding institutional types, from large research institutions (87%) to community colleges (83%).

Figure 5: Institutions reporting increases in international student applications, Fall 2024



This sustained financial commitment helps many U.S. colleges and universities provide resources and support services for prospective international students, retain staff, and conduct outreach initiatives to attract international students.

In addition, the latest findings from *Outlook 2030: The U.S. and International Education* indicate that with a possible increase in international student enrollments, U.S. colleges and universities will need to prepare more resources and build capacity to accept this influx of students.[vi] According to the *Fall 2023 Snapshot on International Educational Exchange,* 92% of institutions indicated their interest in growing their international student numbers in the next five years.

International outreach and recruitment by academic level varies.

We continue to analyze outreach and recruitment of prospective international students by academic level, a feature that we began with last year's Spring Snapshot. To have even more precise reporting, we asked this year for the first time whether institutions were recruiting international undergraduate students, graduate students, or non-degree students.

The findings indicate that of the 365 institutions that reported recruiting international students for 2024/25, 96% were recruiting undergraduate students. Over half of the respondents (58%) were recruiting graduate students; 32% were recruiting non-degree students.

Finally, 28% of respondent institutions were recruiting international students at both the undergraduate and graduate levels.

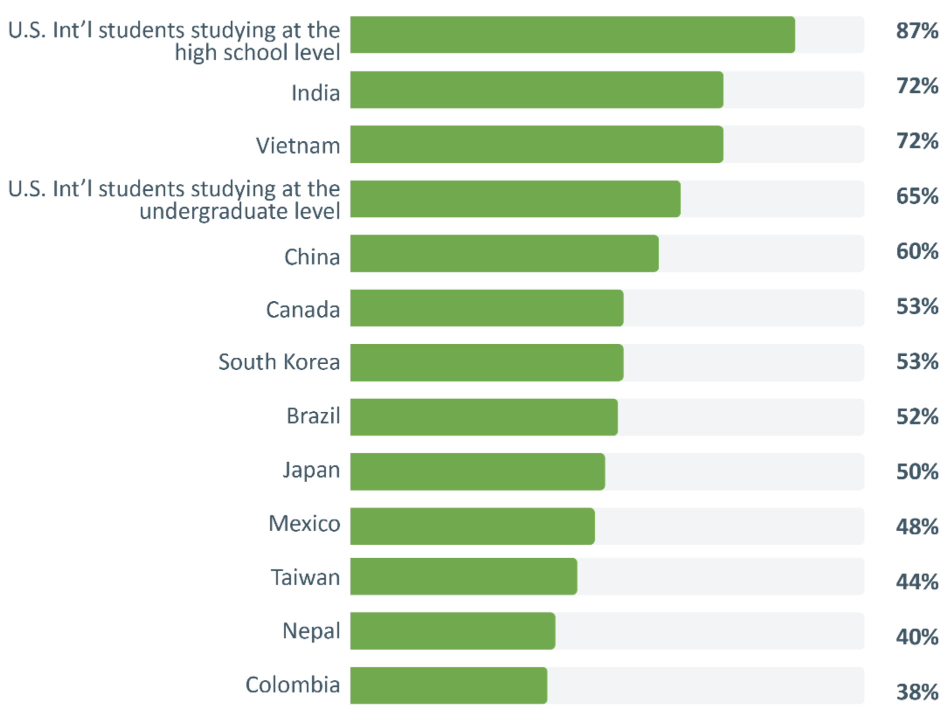
Undergraduate Recruitment

Institutions recruiting international undergraduate students are prioritizing students from India, Vietnam, China, Canada, and South Korea (Figure 6). This is in line with some of the large senders of undergraduate students to the United States, though it is interesting to note that the largest sender, China, is listed in fifth place. This could indicate that institutions want to diversify their undergraduate market strategies beyond China.

This year's analysis includes a larger view of recruitment beyond the top senders. In addition to the markets already mentioned, institutions are recruiting in Latin America (Brazil, Mexico, Colombia), East Asia (Japan, Taiwan), and South Asia (Nepal).

In the United States, most institutions (87%) are also prioritizing international students who are already in the United States and attending high schools, as well as transfer students from other U.S. colleges and universities (65%). This has traditionally been a pathway for institutions to welcome international students already located in the United States.

Figure 6: Undergraduate international recruitment markets



Graduate Recruitment

Most institutions are focusing on India for international graduate recruitment (66%), outpacing recruitment in other places of origin (Figure 7). China, Vietnam, and Nigeria are also strong markets where colleges and universities are conducting outreach to prospective graduate students.

The focus on Indian student recruitment aligns with *Open Doors* data, which found that most Indian students who came to the United States in 2022/23 were graduate students. With the prospect of continued growth in mobility from India, many institutions are focusing on recruitment there. Similarly, *Open Doors* noted increased Chinese graduate students in 2022/23.

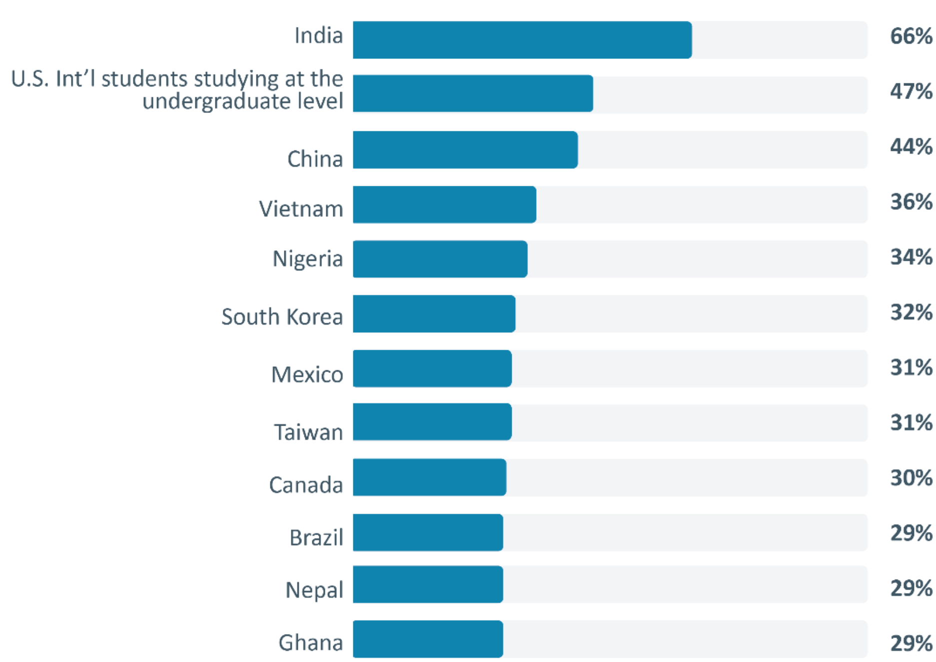
Finally, slightly less than half of the institutions (47%) are conducting outreach to international students already in the United States in undergraduate programs, as this is a natural pipeline for students to remain in the U.S. higher education system for further academic study.

Outreach and recruitment strategies focus on current international students.

Most institutions are focusing on engaging current international students to support the recruitment of prospective students, and this strategy is similar across the undergraduate and graduate levels (Figure 8 on the next page). 70% and 65% of institutions noted leveraging current international students for undergraduate and graduate recruitment, respectively.

For both academic levels, social media is also critical (63% and 58% for undergraduate and graduate). This indicates that institutions use diverse strategies to recruit students at both academic levels.

Figure 7: Graduate international recruitment markets

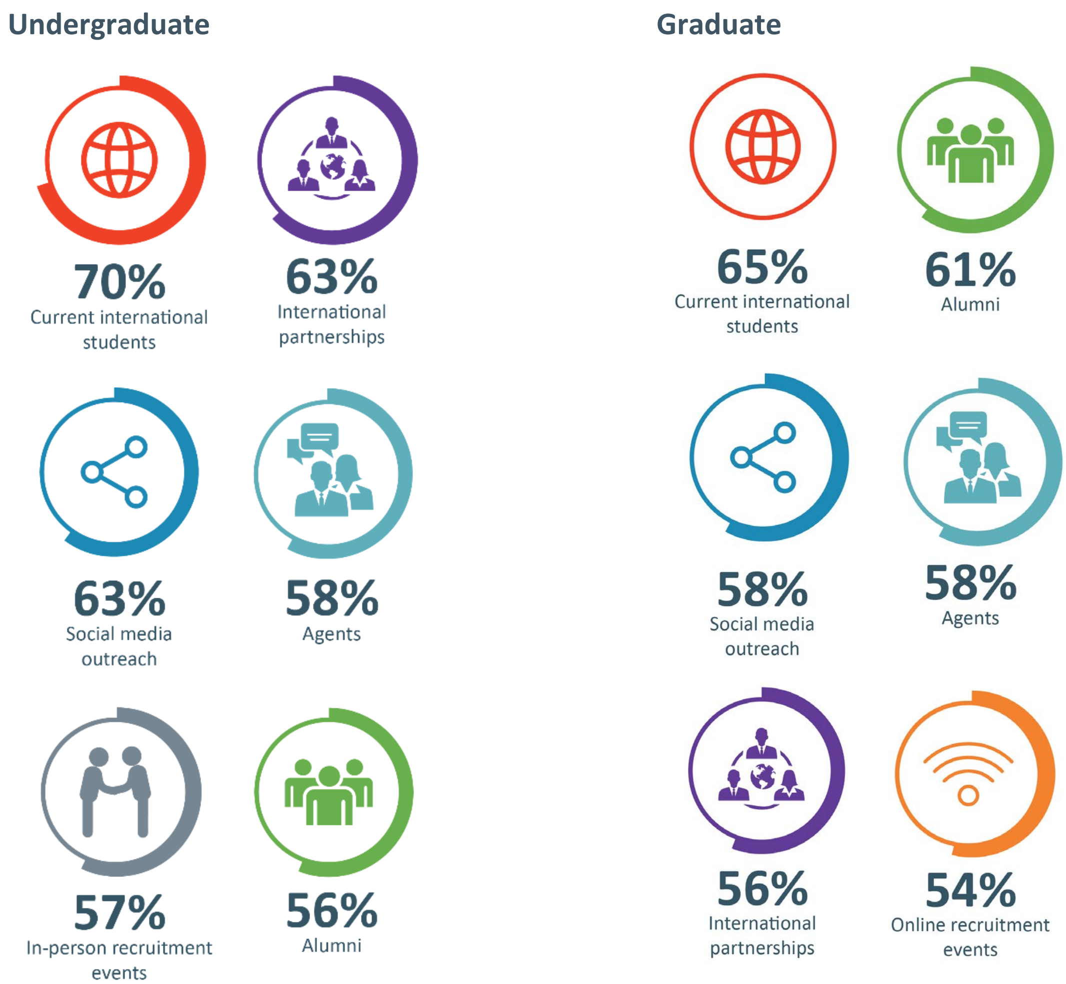


When focusing only on undergraduate student recruitment, more institutions indicated leveraging international partnerships (63%) and alumni (56%) than reported previously.

As undergraduate students may also need personal guidance as they navigate the U.S. higher education system's application process, there are several ways that institutions also engage with students in person. Approximately 57% of institutions held in-person events where they traveled to fairs or regional expos in a student's home country, and 58% noted utilizing agents as part of the undergraduate recruitment process.

Outreach and recruitment strategies for international graduate students also show some interesting differences. These institutions leveraged alumni at a higher rate than in undergraduate recruitment (61%). These institutions also leveraged online recruitment events (54%) more readily than in-person recruitment events, which were more prevalent among undergraduate students.

Figure 8: Recruitment approaches



U.S. Study Abroad

U.S. study abroad continues to increase, as 94% of responding institutions anticipate study abroad numbers will stabilize or increase in 2024/25 compared with the previous year.

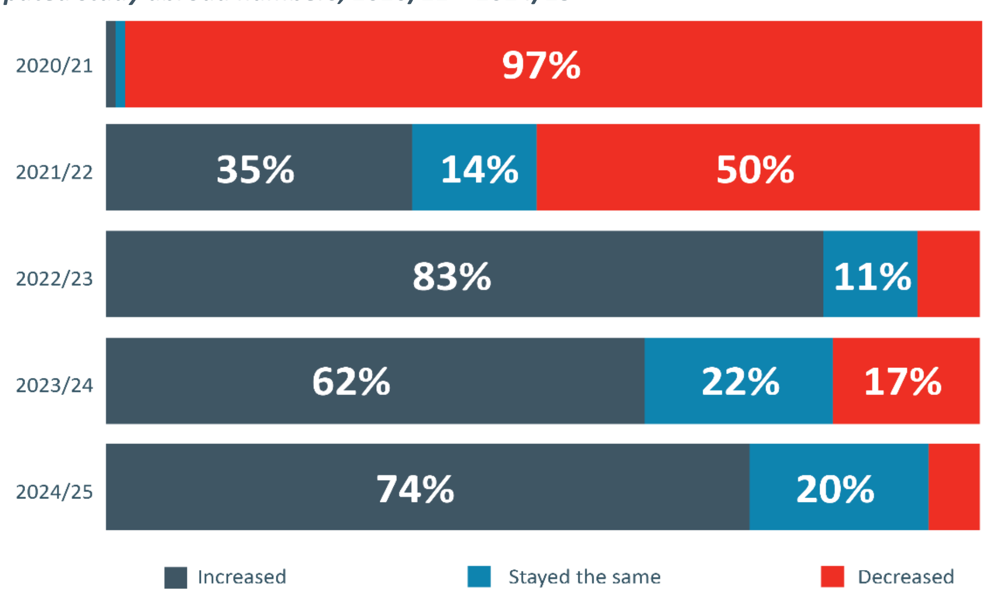
U.S. institutions anticipate an increase in study abroad numbers in 2024/25.

The vast majority (94%) of U.S. colleges and universities reported increased or stable student participation in study abroad in the forthcoming 2024/25 academic year (Figure 9). This continued growth in study abroad builds upon the growth noted in 2022/23 and 2023/24 following the significant declines during the COVID-19 pandemic. This expected growth of study abroad participation was reported across all institutional types.

The vast majority of institutions (89%) reported offering in-person study abroad programs for the fall 2024 semester, while 17% are offering online programs. Only one reporting institution noted that their study abroad program was canceled for the fall 2024 semester.

This indicates a shift back to pre-pandemic study abroad plans and a strong focus on in-person study abroad programming across institutions and institutional types.

Figure 9: Anticipated study abroad numbers, 2020/21 – 2024/25



Destinations for study abroad move beyond just Europe.

Europe has long been the predominant destination for U.S. study abroad, and data from this year's Snapshot indicates that this trend will continue in 2024/25.[vii] When asked where institutions are planning in-person study abroad in 2024/25, the most popular destinations were the traditional European locations (Figure 10).

Figure 10: Institutional priorities for study abroad programming

Argentina 51%	Australia 64%	Costa Rica 70%
Czech Republic 53%	France 78%	Germany 70%
Greece 61%	Ireland 72%	Italy 80%
Japan 76%	Mexico 51%	Netherlands 58%
Spain 80%	South Korea 70%	United Kingdom 82%

Before the pandemic, institutions, sponsors of study abroad scholarships, and providers made extensive efforts to diversify destinations for engaging learning experiences in regions beyond Europe. We are beginning to see a return to these nontraditional destinations. As of 2024/25, many leading program destinations were outside Europe: Argentina, Australia, Costa Rica, Japan, Mexico, and South Korea.

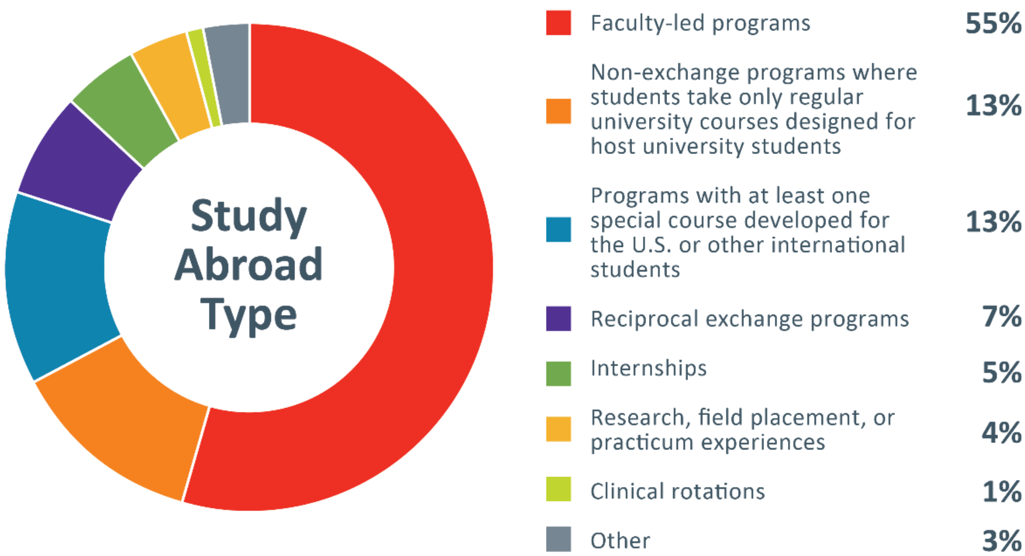
For other destinations, shifts in geopolitics, COVID-19 policies, and security will continue to affect programming. For example, China was the seventh most popular destination before the COVID-19 pandemic, but as of 2024/25, only 34% of institutions noted plans to send students to China. Emerging global issues also affect study abroad. Due to the ongoing conflict in the region, only 10% of institutions indicated planning study abroad programming to Israel in 2024/25.

Most students participated in faculty-led study abroad programs in 2023/24.

Many colleges and universities are embracing different student study abroad program options (Figure 11 on the next page). The most popular way for U.S. students to study abroad in 2023/24 was through faculty-led programs. More than half (55%) of the reported study abroad students participated in faculty-led programs.

Approximately 13% of students pursued non-exchange programs where students take only courses designed for host university students. These students may be on an integrated university study or directly enrolled at the host university for the term. Another 13% of students were on programs with at least one special course developed for the U.S. or other international students on the program. There was a smaller but still notable population of students who participated in reciprocal exchange programs (7%); internships (6%); research

Figure 11: Students studying abroad by program type, 2023/24



programs, field placement, practicum experiences (4%); or clinical rotations (1%).

U.S. study abroad takes incremental steps toward sustainability.

In recent years, there has been an increased awareness of how international education can contribute to many of the United Nations Sustainable Development Goals (SDGs) and the ramifications of international travel's carbon footprint on the SDG's Goal 13: Climate Action. As such, some in the field have called for greater awareness of the climate effects of study abroad and additional research to showcase how U.S. higher education institutions are addressing these issues.[viii]

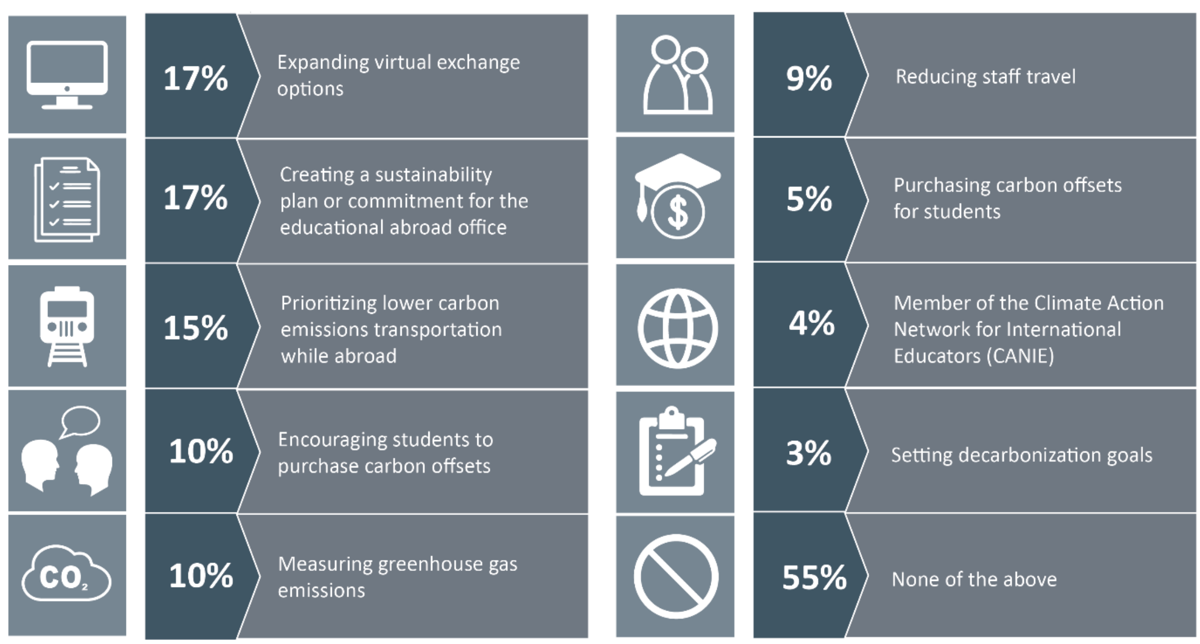
Among Spring 2024 Snapshot respondents, approximately 45% noted implementing study abroad sustainability initiatives (Figure 12 on the next page). For example, approximately 17% of institutions noted the expansion of virtual exchange options, an increase from 6% reported in last year's snapshot.

Another programmatic design area institutions can prioritize is choosing transportation with lower carbon emissions while students are abroad, a priority that 15% of reporting institutions noted promoting, up from 8% last year. With many students studying abroad in Europe, train travel rather than flights between countries is one way of decreasing a program's carbon footprint. As institutions seek ways to make programs more sustainable, it will also be interesting to note whether short-term programs will continue to rise in popularity.

Institutions also reported approaching sustainability through measures taken by study abroad offices. Approximately 17% of reporting institutions cited creating sustainability plans or commitments for the education abroad office, up from 9% last year. To understand how best to improve their future study abroad carbon footprint, 10% of offices are working to measure their greenhouse gas emissions. To address the direct effects of travel, 10% of institutions encouraged students to purchase their offsets, and 5% noted purchasing offsets directly for the students, which could be incorporated directly into study abroad costs.

Finally, only 4% of respondents noted being a part of the Climate Action Network for International Educators (CANIE). More can be done here to advocate for the field's focus on the issue of climate change, and CANIE is an important effort to bring this to study abroad programs' and U.S. colleges' and universities' attention.[ix] While we have seen some progress in the last year of reporting, it is important to note that over half of the respondents this year indicated they did not have any sustainability or climate change initiatives. We look forward to tracking this information over time to see if there are any changes in these initiatives in the coming decade.

Figure 12: Study abroad sustainability initiatives



Conclusion

The *Spring 2024 Snapshot on International Educational Exchange* presents the most up-to-date international student mobility trends to the United States and U.S. study abroad as we approach the 2024/25 academic year. We note cautious optimism in both inbound and outbound mobility as institutions continue to cite increased international student enrollment and U.S. study abroad programming.

For both inbound and outbound mobility, these increases signify an opportunity to focus on diversity and access in international education. For international students, expanding to sender markets in Latin America, Sub-Saharan Africa, or South Asia means that U.S. campuses will benefit from the richness of perspectives from around the world. Expanding programming beyond the traditional European destinations in U.S. study abroad will require advanced planning and bring immense opportunities for students looking to study abroad in nontraditional destinations.

Finally, a focus on sustainability has been growing, and we note that institutions have introduced measures and action steps to focus on sustainability and climate action in their study abroad programming. With this focus must also come the concerted effort to discuss what is being done and surface emergent practices so that U.S. colleges and universities can learn from each other.

We thank the 662 U.S. higher education institutions who generously took the time to respond to this survey. Your responses allow us to provide these insights and continue discussing the future of international educational exchange.

[i] Baer, J. & Martel, M. (2023). *Fall 2023 international student enrollment snapshot.* Institute of International Education. https://www.iie.org/publications/fall-2023-snapshot-on-international-student-enrollment/

[ii] Martel, M., Baer, J., Mason, L., Andrejko, N., & Nemeth, N. (2023). *Open doors® report on international educational exchange.* Institute of International Education. https://www.iie.org/publications/open-doors-report-on-international-educational-exchange/

[iii] IDP Connect (2021). *New Horizons Infographic Report.* https://www.idp-connect.com/usa/articles/international-market-trends/us-press-release-new-horizons

[iv] U.S. Immigration and Customs Enforcement. (2023). *Broadcast message: termination of SEVP COVID-19 flexibilities*. https://www.ice.gov/doclib/sevis/pdf/bcm2305-04.pdf

[v] Baer, J. & Martel, M. (2023). *Fall 2023 international student enrollment snapshot.* Institute of International Education.

[vi] Goodman, A. & Martel, M. (2024). *Outlook 2030 Brief: U.S. and International Education*. Institute of International Education. https://www.iie.org/publications/outlook-2030-brief-the-u-s-and-international-education/

[vii] Institute of International Education. (2022). *Host Regions of U.S. Study Abroad Students, 2005/06–2021/22* [data set]. Open Doors Report on International Educational Exchange. https://opendoorsdata.org/data/us-study-abroad/host-regions/

[viii] West, E. (2022, November 26). For international educators, climate action must come first. *University World News*. https://www.universityworldnews.com/post.php?story=20221123091051706.

[ix] CANIE: Home. https://canie.org/