



The Power of International Education



# Fall 2020 International Student Enrollment Snapshot

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## Introduction

The Fall 2020 International Student Enrollment Snapshot presents current international student enrollment patterns based on data from over 700 U.S. higher education institutions. The report focuses on international students studying in person or online (in the U.S. or from abroad) at U.S. higher education institutions in Fall 2020. The findings reflect how the COVID-19 pandemic has affected the U.S. higher education sector and global student mobility to the United States. The report, conducted by IIE and nine partner higher education associations, is released jointly with and complements *Open Doors 2020*, which provides a comprehensive view of international student trends from the previous year (2019/20). *Open Doors 2021*, to be released in November 2021, will survey more than 2,900 institutions to provide a full picture of 2020/21 international student enrollment.

## Key Findings

U.S. higher education institutions have adapted so that international students can attend classes amid the COVID-19 pandemic.

- 99 percent of responding institutions are holding classes online or implementing a hybrid model. One in five international students (20 percent) are studying online from abroad in Fall 2020.
- Most institutions report providing specific support to international students on campus and online: virtual networking events (74 percent), adapting course schedules and teaching methods to accommodate international students (68 percent), and emergency student funding for international students on campus (29 percent).
- 100 percent of institutions with international students on campus are instituting protocols to support all students' safety. Measures include restricting campus events and social areas, publishing safety guidelines, requiring face coverings, and reducing class sizes.

The COVID-19 global pandemic has impacted international student enrollment.

- The vast majority of responding institutions (97 percent) continue to host international students.
- Total international students at higher education institutions in the United States and studying online outside the United States decreased by 16 percent in Fall 2020.
- New international student enrollment in the United States and online outside the United States has decreased by 43 percent in Fall 2020. Many international students studying at U.S. institutions took advantage of opportunities to begin their studies remotely. According to *Open Doors*, new student enrollment accounted for 25 percent of the international student population in 2019/20.
- 90 percent of institutions report international student deferrals in Fall 2020. Responding institutions indicate that nearly 40,000 students have deferred enrollment to a future term.

U.S. colleges and universities remain committed to international student outreach and recruitment.

- 82 percent of responding institutions report increasing virtual recruitment through online recruitment events (74 percent) and asynchronous or synchronous virtual campus visits (54 percent).
- 64 percent of institutions have committed funding for outreach and recruitment of international students at the same level or higher than previously.
- Over half of all responding institutions are leveraging current international students (68 percent), online recruitment (58 percent), social media (56 percent), EducationUSA (53 percent), and international partnerships (53 percent) for outreach and recruitment.
- 56 percent of institutions are recruiting international students at U.S. high schools. Approximately half are prioritizing overseas recruitment in China, Vietnam, and India.

# Methodology

## Survey Background and Data Collection

Ten partnering higher education associations distributed the Snapshot survey to their member institutions across the United States in late September and early October 2020. The survey was carried out by IIE in cooperation with American Association of Collegiate Registrars and Admissions Officers, American Association of Community Colleges, American Association of State Colleges and Universities, American Council on Education, Association of Public and Land-grant Universities, College Board, Council of Graduate Schools, National Association for College Admission Counseling, and NAFSA: Association of International Educators.

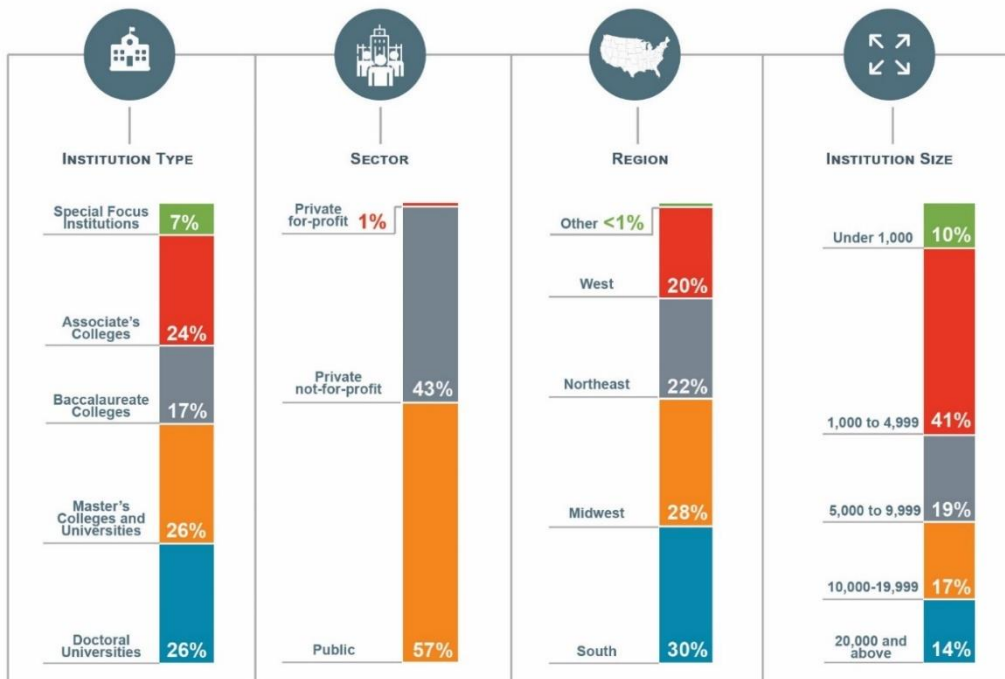
The survey captured 717 valid responses from higher education institutions throughout the United States. Not all respondents provided complete data. As a result, valid item response rates are lower for some questions. The 2020 Snapshot survey sample represents a subset of the 2,900 higher education institutions surveyed on an annual basis as part of the *Open Doors International Student Census*.

This year's Fall 2020 Snapshot results complement IIE's COVID-19 Snapshot Survey Series which has tracked the effects of COVID-19 on U.S. higher education since March 2020. The series includes three reports: *Academic Student Mobility to and from China (March)*, *From Emergency Response to Planning for Future Student Mobility (May)*, and *New Realities for Global Student Mobility in Summer and Fall 2020 (July)* (IIE, 2020a)

## Respondent Profile

Respondents to the 2020 Snapshot survey reflect a broad range of institutional types and locations from across 49 states, one U.S. territory and Washington, D.C. Overall, the profile of the Snapshot survey respondents closely mirrors the profile of institutions that completed the *Open Doors 2020 International Student Census*. Similar proportions are noted among geographic regions, institutional sector, type, and size.

Figure 1: Snapshot Sample Representation

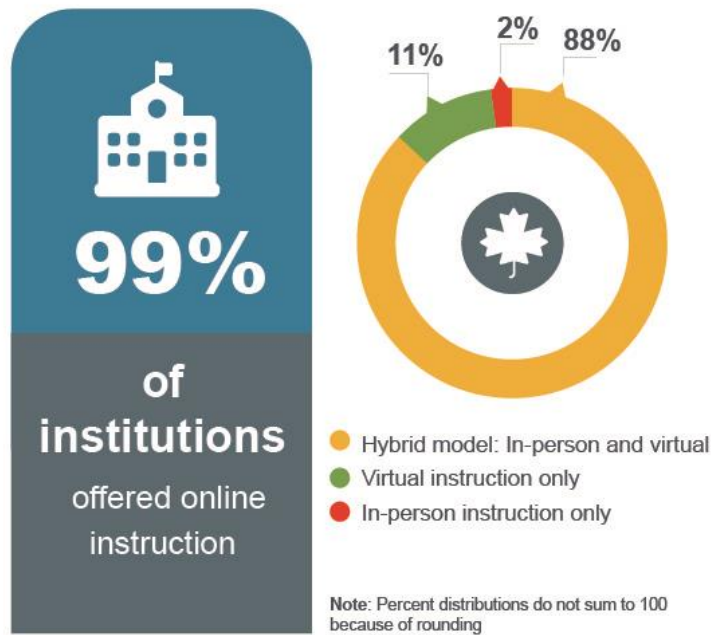


# U.S. Higher Education Realities in Fall 2020

## Mode of Instruction

To put the Fall 2020 Snapshot findings in context, it is important to analyze the realities of U.S. higher education institutions at the start of the Fall 2020 academic semester. In late summer, while COVID-19 cases continued to fluctuate throughout the United States, universities and colleges had to decide on their mode of instruction to prepare for the semester. In July 2020 in IIE's COVID-19 Snapshot Report, more than 90 percent of reporting institutions anticipated implementing a mode of instruction different than the previous year (Martel, 2020). These decisions, especially around providing in-person and virtual instructional options and housing on campus, directly affected international students.

Figure 2: Mode of Instruction in Fall 2020



In Fall 2020, 99 percent of responding institutions report a hybrid or online-only mode of instruction. More than 620 institutions (88 percent) report offering a hybrid option of some in-person classes and online options. These hybrid models have been implemented at institutions throughout the country from small, private colleges to large, public university systems. Only 11 institutions of more than 700 respondents, or approximately 2 percent, indicate that their campuses are offering classes in person only. Of these institutions, the vast majority are private institutions and universities that enroll less than 5,000 students.

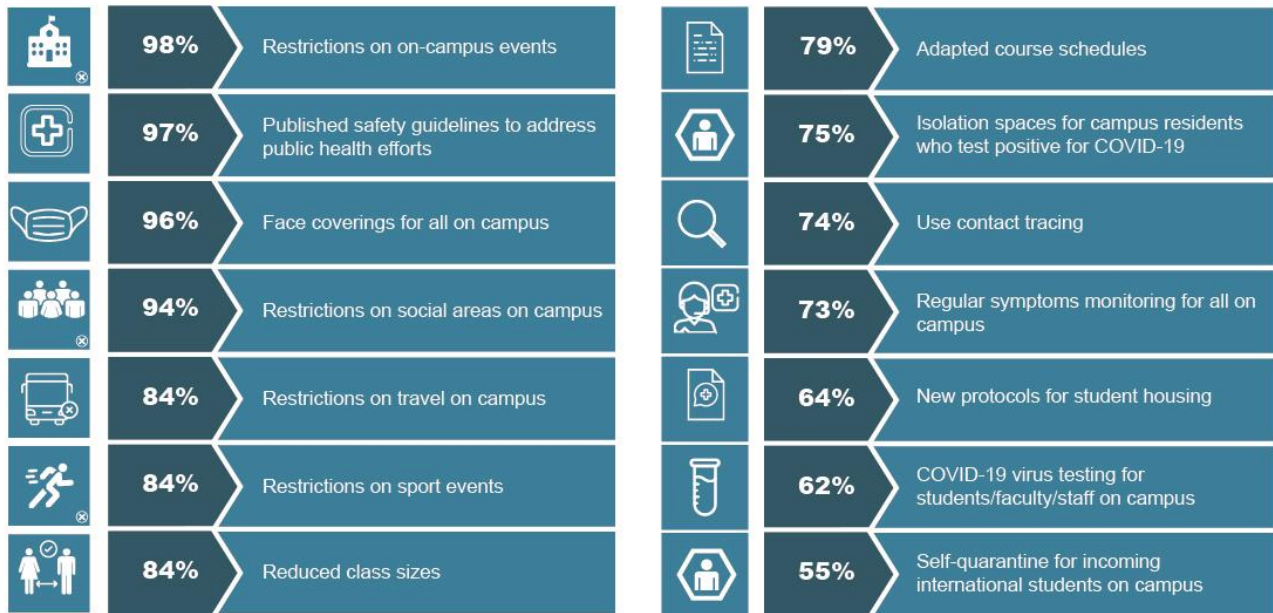
While IIE administered the survey in October 2020, institutions were considering necessary changes due to a potential spike in COVID-19 cases. Over 43 percent of institutions anticipate

a change to the academic calendar, with most of these institutions expecting to end the academic calendar earlier than usual (69 percent). Some institutions plan to be fully virtual after the Thanksgiving holiday, while others anticipate ending the semester early to clear campuses ahead of the winter months. Plans for ending the semester early are evident across all institution types.

## Safety and Security Measures on U.S. Campuses in Fall 2020

All of the institutions that report a hybrid or in-person mode of instruction have committed to extensive measures to keep students, faculty and staff safe on campus. While hybrid options include in-person instruction, several institutions note that campus activities are minimal and include only lab work or essential research. Most institutions note extensive efforts to limit individuals' contact in housing, classes, and campus facilities. More than 90 percent of institutions cite restricting on-campus events and social areas as well as requiring face coverings for all on campus.

Figure 3: Safety and Security Measures on Campuses in Fall 2020



In addition to curbing in-person contact on campus, institutions report necessary measures to adjust instruction, such as reduced class sizes and adapted course schedules. COVID-19 virus testing for students, faculty, and staff is conducted on campuses at more than 60 percent of institutions, with higher levels of testing reported by private institutions (70%) and those with 20,000 or more students (79%). While we do not have evidence that larger institutions have more students, faculty and staff on campus, these institutions are more likely to report testing procedures in place. Compared to similar data collected in July 2020, institutional capabilities for testing and contact tracing have significantly improved. The availability of COVID-19 testing notably increased (+24 percentage points).

Several measures impact international students directly. For example, a majority of institutions implement either self-quarantine for international students arriving on campus or requirements for negative COVID-19 tests for incoming students. Additionally, 64 percent of institutions note new protocols for student housing, with limited space and occupancy. These measures can directly impact support for international students on campus, which is further discussed on page eight.



## Changes in Total and New International Enrollment

As the landscape for Fall 2020 enrollments comes into focus, the Snapshot provides initial indications into how international student enrollment to the United States is being affected by COVID-19. The pandemic is impacting international student enrollment on a global level and across all major countries that host international students, as millions of mobile students are unable to pursue education-related travel in 2020. In addition to IIE, our Project Atlas research partners around the world are studying the ramifications that COVID-19 has had on global student mobility (Appendix I).

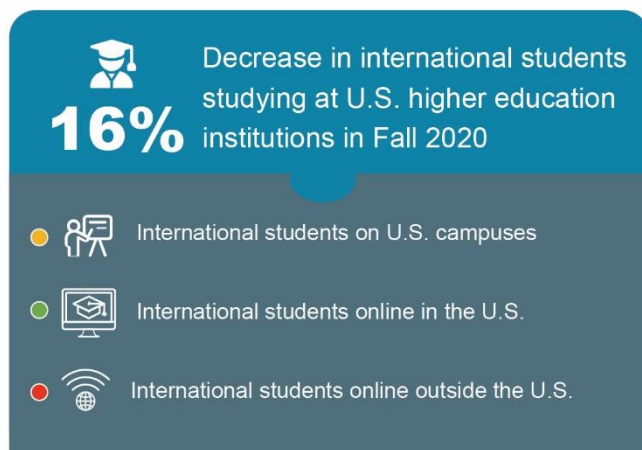
### Total Enrollment in the United States

The data collected in this year's Snapshot expanded to include U.S. higher education institutions offering enrollment to international students to conduct coursework in person and online. The analysis includes three categories of students:

1. International students physically present on campus at U.S. higher education institutions
2. International students physically present in the United States attending classes online
3. International students outside the United States attending classes full-time online

The vast majority of responding institutions (97 percent) continue to host international students within the United States. Of that 97 percent, 81 percent have enrolled students on campus and 64 percent have students online. A large proportion (83 percent) of colleges and universities also report enrolling students online outside the United States. In fact, a majority of the respondents (59 percent) cite supporting international students in all three of these categories – an indicator of how flexible U.S. colleges and universities have been in supporting international students.

Figure 4: Total Enrollment in Fall 2020



In Fall 2020, institutions responding to the Snapshot reported a 16% decrease in international students, including those on campus, online in the U.S., and online outside the U.S. The data indicate that 80 percent of international students are studying in the United States while 20 percent of international students are enrolled online outside the United States. In comparison, 99.6 percent of international students were physically in the United States in Fall 2019.

It was important to capture data for the first time on the third classification of international students enrolled online outside the United States, since many of these

students may arrive in the United States once travel restrictions ease.

The change in international student numbers at U.S. higher education institutions is evident across all institutional types, all sectors, and nearly every state. There are slight variations by institutional type with international students at doctoral institutions, master's college and universities, and community colleges declining by 15, 21, and 27 percent, respectively.

The international education sector in the United States has felt the unprecedented nature of the COVID-19 pandemic ripple through the field. In March 2020, the U.S. Department of State suspended routine nonimmigrant visa services at all U.S. Embassies and Consulates to protect the safety of students and the workforce (U.S.

Department of State, 2020a). The Department began a phased resumption of routine visa services in July 2020 and has since worked to prioritize and process student visas (U.S. Department of State, 2020b; IIE, 2020d). Nevertheless, U.S. Embassy and Consulate closures, travel restrictions, safety considerations, and a movement to online classes all had an impact on international students' options to study in the United States in Fall 2020.

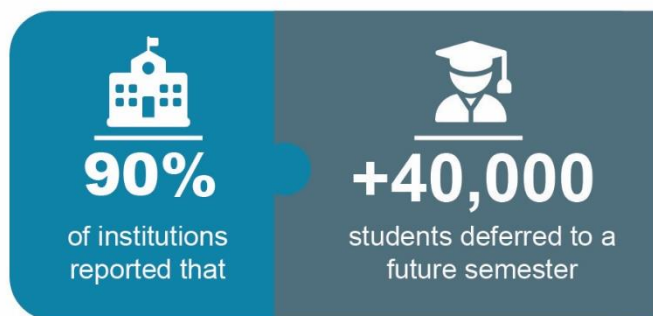
Prior to this year, the Snapshot used a standard definition of international student mobility of anyone studying in the United States on a nonimmigrant, temporary visa that allows for academic coursework. The total number of international students in the United States using the traditional definition decreased by one third from Fall 2019 to Fall 2020.

## New Enrollment in the United States

The effects of COVID-19 are particularly notable among new enrollment in the United States, since most of these students were still in their home country prior to the pandemic. Among new international students attending U.S. higher education institutions both in the United States and those pursuing full-time course work virtually outside the United States, enrollment has decreased by 43 percent.

More new international students began their coursework online outside the United States than inside the United States. Responding colleges and universities report that 49 percent of new international students are in the United States and 51 percent of new international students are enrolled online outside the United States in Fall 2020. As a result, and not surprisingly, responding colleges and universities report that new enrollment of international students physically in the United States declined by 72 percent.<sup>1</sup>

Figure 5: Deferments from Fall 2020



Despite declines this year, many students have deferred enrollment for Fall 2020 with plans to enroll in the United States in a future term. Among the responding colleges and universities, 90 percent of institutions report international student deferrals. These institutions indicate that more than 40,000 international students have deferred their enrollment to a future term.

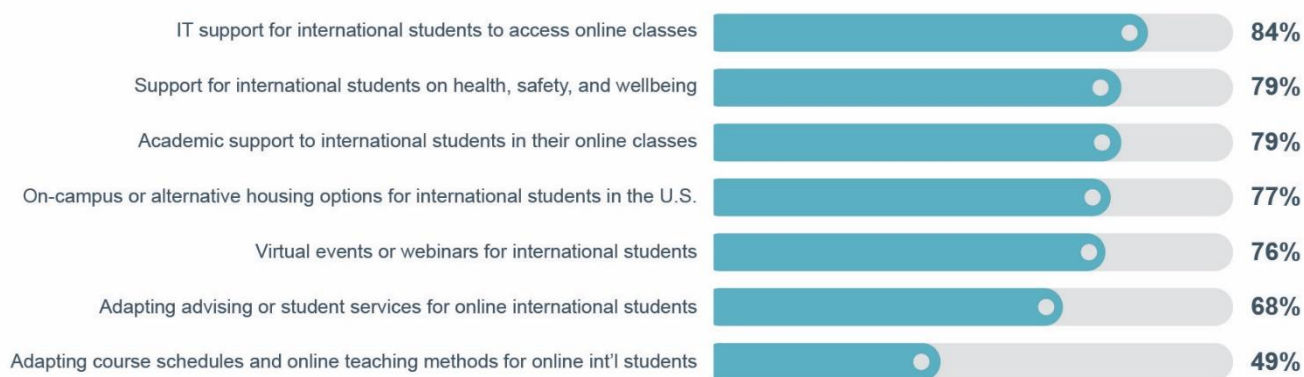
<sup>1</sup> Standard definition of international student mobility in Snapshot and *Open Doors* includes anyone studying in the United States on a nonimmigrant, temporary visa that allows for academic coursework.

## Support for International Students

In the 2019/2020 academic year, U.S. universities and colleges are responding to the needs of their international students in the United States and studying online abroad. The realities of international students' circumstances and locations can provide additional obstacles and opportunities for colleges and universities to continue to focus on this important demographic of their student population.

More than 97 percent of respondent institutions report that they are providing support to international students in the United States and abroad. The remaining schools report providing the same supports to U.S. and international students. These are more likely to be institutions that report smaller numbers of international students.

Figure 6: International Student Support in Fall 2020



### Additional Support for International Students Online

More than 99 percent of institutions offer courses online and, as such, assistance is critical for the success of international students in a virtual environment. More than 80 percent of institutions provide IT support to students to access online classes. Whether in the United States or in their home country, international students enrolled in online classes may require support to log into classes, communicate with faculty, and engage with classmates. Zoom calls, IT office hours, and computer loans for international students in the United States are also offered to help students succeed in their online classes.

Many institutions (79 percent) also provide academic support for students in their online classes. Additionally, advising and student services are critical for all students and challenging to manage virtually. Almost 70 percent of institutions have adapted their advising and student services to accommodate students online. Institutions report forming clusters of international students to maintain their academic advising during different time zones, additional platforms or options for international students to connect with their faculty and staff, and virtual appointments for academic and overall well-being.

Approximately half of institutions (49 percent) indicate adapting course schedules and teaching methods online to international students. Our analysis shows that most of these institutions have set up their classes in a way that many of the strategies apply to all students, not just international students. Some institutions report offering asynchronous times for their classes and creating opportunities for students to communicate during evening hours in the United States. Nevertheless, for international students signing into real-time studies during U.S. working hours, there are challenges of adapting their academic hours while living in different time zones.



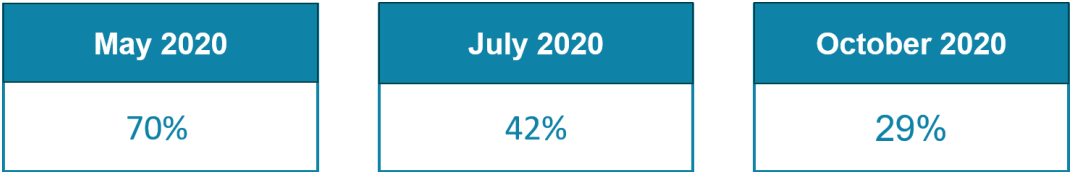
The virtual environment can be difficult for students to engage with others online or on campus. Since the outbreak of COVID-19 in March 2020, IIE has monitored how universities are supporting international students' health, safety and well-being. In Fall 2020, 79 percent of institutions continue to provide health, safety, and well-being support to their international students. This number is consistent with the 72 percent of institutions that reported increased communications on health, safety, and well-being to international students in July 2020 (Martel, 2020). Now, three out of four institutions (76 percent) offer virtual events or webinars for international students. Especially for new international students, this is a welcome opportunity for students to get to know others and learn about their university.

### Additional Support for International Students on Campus

A substantial proportion of U.S. higher education institutions report international students located on their campus in Fall 2020 (81 percent). At 77 percent of institutions, these students have access to on-campus or alternative housing. Institutions report that if they cannot offer housing on campus, they have worked with international students to secure housing off-campus. Several institutions also report providing food, childcare resources, and support groups.

Throughout the COVID-19 pandemic, IIE has also monitored support provided to international students in the United States through emergency student funding, including IIE's Emergency Student Fund and funds provided to students by their universities (IIE, 2020b). While this level of support was at its height in Spring 2020 when campus offices and housing closed unexpectedly and international students could not travel home, the support has continued during the summer and into the fall. In Fall 2020, almost one-third of institutions continue to provide COVID-19 emergency student funding for international students currently in the United States.

Figure 7: COVID-19 Emergency Student Funding Provided for International Students by U.S. Institutions

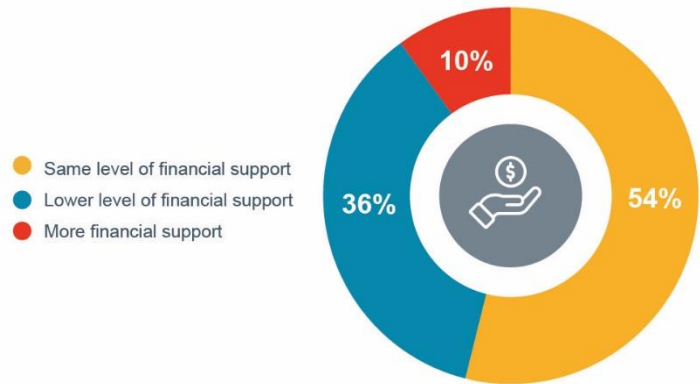


## Looking to Next Year's Recruitment Cycle

### Financial Commitment to International Student Outreach and Recruitment

Despite the difficult financial climate and the expenses that colleges and universities have incurred to protect students on campus or transition to online enrollment, responding institutions report a continued financial commitment to international education (Lederman, 2020). The majority (64 percent) of U.S. higher education institutions are funding outreach and recruitment at the same level or higher than previously. This level of support varies slightly by institutional type with special focus institutions (88 percent), baccalaureate colleges (78 percent), and doctoral universities (65 percent) reporting higher levels of increased or continued levels of funding. The majority of reporting institutions are engaged in some level of outreach and recruitment, and only 21 percent report not actively recruiting international students.

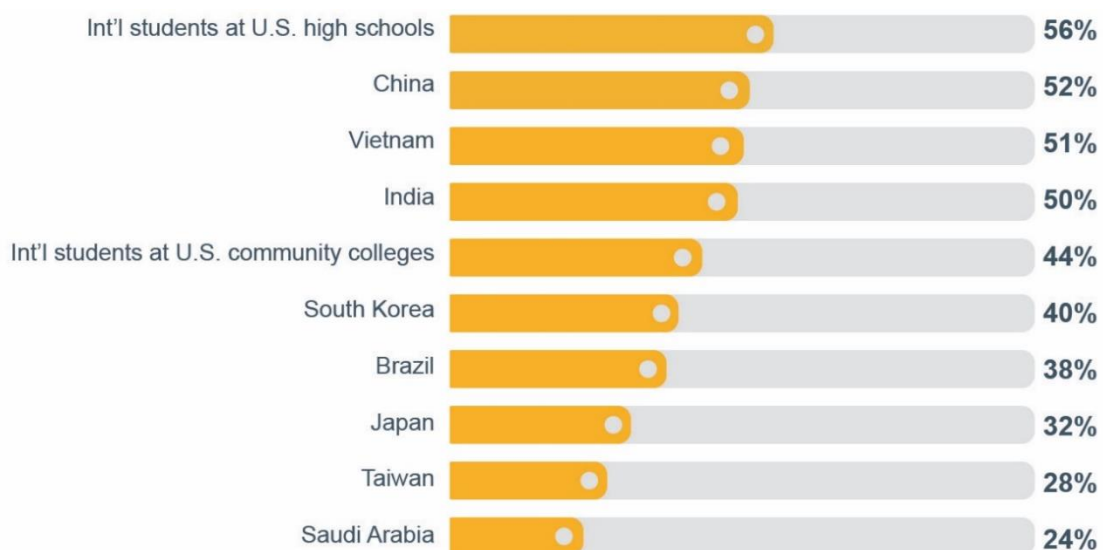
Figure 8: Financial Support for Outreach and Recruitment



### Recruiting International Students within the United States

Given the constraints on international travel during the COVID-19 pandemic, many institutions have shifted their recruitment focus toward international students already pursuing educational activities at U.S. high schools and community colleges (63 percent). For the first time ever, U.S. colleges and universities list efforts to recruit locally from U.S. high schools as the number one area of focus for outreach (56 percent). Furthermore, 44 percent of institutions are looking to recruit international students at community colleges, which reflects an increase of seven percentage points over the prior year.

Figure 9: Institutional Recruitment Priorities



The high proportion of colleges and universities turning to U.S.-based international student recruitment reflects a recognition that more than 69,000 international high school students and 79,000 international community college students are studying in the United States (Mason & Andrejko, 2020; IIE, 2020c).

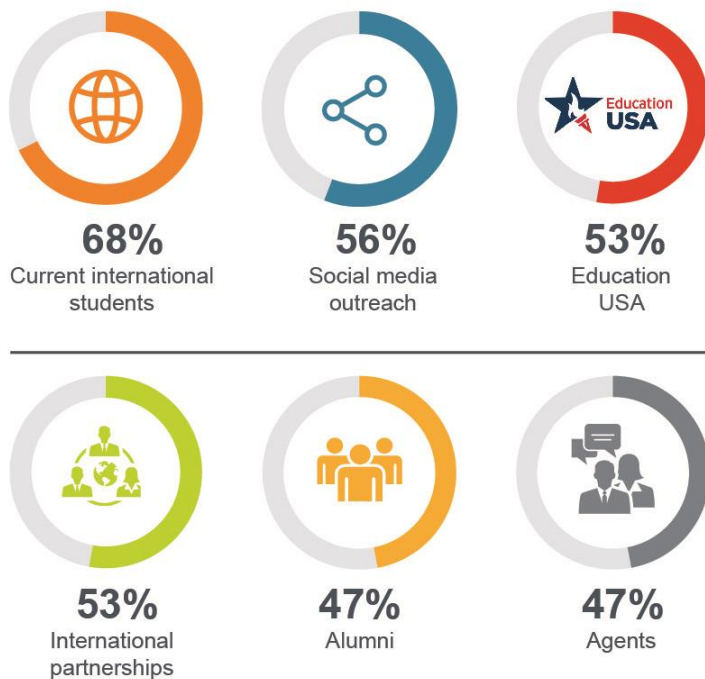
### Institutions Prioritize Overseas Outreach to Asia

While many institutions are expanding recruitment efforts in the United States due to COVID-19, that has not meant a withdrawal from conducting outreach globally. China continues to be the leading international market for international student recruitment with 52 percent of institutions reporting a focus on outreach in the country. Other Asian places of origin that remain popular areas for recruitment include Vietnam (51 percent), India (50 percent), and South Korea (40 percent). Although Asian places of origin continue to be the national recruitment area of focus, U.S. colleges and universities are also prioritizing outreach on 75 other locations around the world. As institutions plan for recruitment in the Fall of 2020, colleges and universities can visit Embassy or Consulate’s websites for up to date information on operating status and services offered (U.S. Department of State, 2020b). IIE Network’s guide to *Reopening International Exchange* also provides the status of U.S. Embassy and Consulate openings, testing limitations, and travel restrictions among the leading places of origin as of September 2020 (IIE, 2020d).

### Institutions Leverage Multiple Sources to Recruit International Students

In order to better analyze the recruitment of international students both in the United States and globally, the Snapshot also collected data about the resources U.S. higher education institutions are leveraging to recruit international students.

Figure 10: Resources Leveraged to Support Outreach and Recruitment



Of institutions actively recruiting international students, 68 percent report proactively working with current international students on their campus for recruitment efforts, which reflects a 9-percentage point increase over the prior year. Current international students are often able to provide personal, authentic testimonials as to how international students can succeed on their campus and in the United States.

Many institutions are utilizing social media for outreach (56 percent). Many U.S. colleges and universities run their own social media campaigns that showcase campus life, provide virtual tours, and give insights into the successes of students, faculty and alumni. In addition, the [#YouAreWelcomeHere](#) campaign, advanced nationally by Temple University,

has continued to garner global attention, with more than 350 higher education institutions and organizations using this hashtag to promote that all international students are welcome to study in the United States ([#YouAreWelcomeHere, 2020](#)). Building upon the success of the social media campaign, more than 50 colleges and universities have committed to providing scholarships to international students through the [#YouAreWelcomeHere](#) national scholarship program.

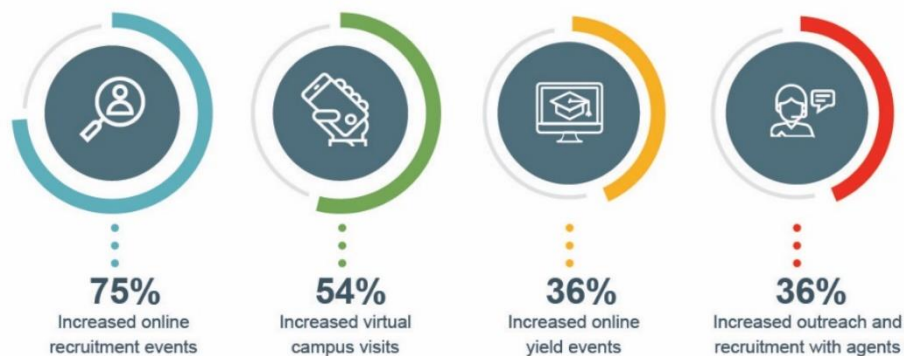
U.S. governmental resources are also cited as popular recruitment resources, with 53 percent of colleges and universities leveraging [EducationUSA](#), 22 percent using the U.S. Commercial Service, and 17 percent working with their Education State Consortia. EducationUSA is a U.S. Department of State network that promotes U.S. higher education to students around the world by offering accurate, comprehensive, and current information about opportunities to study at accredited postsecondary institutions in the United States (U.S. Department of State, 2020). In addition, EducationUSA provides services to the U.S. higher education community to help institutional leaders meet their recruitment and campus internationalization goals by offering resources such as the [Global Guide](#), student mobility fact sheets, recruitment fairs, and a network of more than 430 international student advising centers in more than 175 countries and territories. The [U.S. Commercial Service](#) also has education and training services industry specialists who provide resources on the global competitiveness of the U.S. education industry, expanding market access, and recommendations on digital strategies for outreach to different markets (International Trade Administration, 2020a). They also convene the Education State Consortia (study state consortia), which brings together institutions within a state for the purpose of promoting that state as a destination for international students to study (International Trade Administration, 2020b).

Approximately half of respondents also reported leveraging international partnerships (53 percent), alumni (47 percent), and agents (47 percent) to conduct international student recruitment.

### Virtual Recruitment of International Students

One of the greatest challenges that U.S. colleges and universities cited is the limited ability to travel for outreach and recruitment due to COVID-19 (71 percent). Despite this obstacle, institutions have remained nimble and worked to move recruitment activities online and expand their virtual outreach networks. As a result, the Snapshot also asked about what measures colleges and universities are putting in place to support virtual outreach and recruitment.

Figure 11: Measures for Virtual Outreach and Recruitment



Colleges and universities have moved to online recruitment events (75 percent) and conducted either asynchronous or synchronous virtual campus visits (54 percent) so that prospective students can see what it will be like to be on campus when traveling restrictions ease (ICEF, 2020).

Furthermore, institutions have strengthened their

engagement with partners to conduct recruitment globally with a number of institutions reporting that they had *increased* their level of virtual engagement with agents (36 percent), EducationUSA (33 percent), international partnerships (24 percent) and third party pathway providers (14 percent). It is important to note that 82 percent of the reporting colleges and universities indicated that they are implementing multiple measures to support their virtual outreach and recruitment strategy for Fall 2021.

## Conclusion

The findings from the Fall 2020 Snapshot indicate that while the COVID-19 pandemic has significantly affected international student mobility flows to the United States and worldwide, the U.S. higher education community remains committed to supporting international students attending their universities in person and online. The analysis also indicates that responding universities continue to pursue international students for future enrollment. Institutions understand both the economic and academic value of having international students in their diverse student body with international students contributing approximately \$44 billion to the U.S. economy and supporting over 400,000 jobs across the United States as of 2019 (U.S. Department of Commerce, 2020; NAFSA, 2020).

As the higher education community continues through the fall semester and looks ahead to the second half of academic year 2020/2021, it is important to consider the findings from this report for planning and context.

- **Realities on U.S. campuses will determine possibilities for international students to enroll in person or online.** U.S. universities and colleges have already put into place significant measures to ensure the safety and security of students, faculty, and staff. Looking forward to the next semesters, institutions will need to consider whether to strengthen these measures and offer more classes in person or continue their hybrid or online models. These realities will affect international students, particularly new international students who are applying for visas and entering the United States for the first time. The majority of these students in the fall 2020 semester attended classes online and are prepared to attend classes in person when possible.
- **Enrollment for international students in the United States and studying online will be affected by deferrals and recruitment efforts.** While enrollments of international students at U.S. institutions decreased in Fall 2020, we note that nine out of ten institutions indicated almost 40,000 students have deferred to a future semester. This indicates student interest and commitment to U.S. study and may improve enrollment numbers in future semesters. Outreach and recruitment efforts should focus on informing international students of in-person and online study opportunities in the United States to help these students make informed decisions on their options.
- **U.S. institutions will need to continue to adapt and meet challenges if necessary.** The uncertainties of the COVID-19 pandemic have shown that institutions need to remain flexible given the realities of the evolving health crisis. They have also faced additional obstacles, including limited opportunities for travel and research, institutional layoffs and economic woes, as well as decreasing enrollments of students domestically and internationally. Our findings have shown that institutions have persevered in this environment; however, the realities indicate that effective decision-making and communication are critical to successful planning.

Research conducted by the Institute of International Education since 1919, and in collaboration with the Snapshot Survey Partners for the past 15 years, has shown that external factors will continue to affect trends in international student mobility to the United States. While many of these events may be unprecedented and outside institutions' controls, the yearly trend analysis we conduct gives the field valuable perspectives and a wider context on mobility patterns. This year, as in previous years, we reflect on the commitment that U.S. institutions demonstrate to current and future international students. Rather than stepping away from internationalization due to the challenges of the COVID-19 pandemic, U.S. higher education institutions remain dedicated to recruiting international students and providing them with a successful and positive experience.

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## APPENDIX I:

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### GERMANY: GERMAN ACADEMIC EXCHANGE SERVICE

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