Fall 2024 Snapshot

ON INTERNATIONAL STUDENT ENROLLMENT

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November 2024

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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.

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Introduction

The *Fall 2024 Snapshot on International Student Enrollment* presents current patterns in international student enrollment for the 2024/25 academic year. The report focuses on international students studying at U.S. higher education institutions. The report, conducted by the Institute of International Education (IIE) and ten partner higher education associations, complements the *Open Doors® Report on International Educational Exchange*. As the Snapshot Survey represents a subset of the close to 3,000 institutions surveyed by *Open Doors*, the full picture of 2024/25 enrollment will be analyzed in *Open Doors* 2025.

Key Findings

The *Fall 2024 Snapshot* indicates the continued growth of international students studying at U.S. higher education institutions in the 2024/25 academic year.

International student totals grow by 3% in the 2024/25 academic year:

- A 3% growth in international students (undergraduate, graduate, non-degree, and Optional Practical Training [OPT]) builds on the 7% growth in 2023/24 and the 12% growth in 2022/23 (*Open Doors*). This marks four years of increases in international students since the COVID-19 pandemic.
- International student enrollment grows at the undergraduate level (+6%) and slightly declines at the graduate level (-2%).
- New enrollments, a subset of total enrollments, indicate a 5% decrease for international students studying at their college or university for the first time.
- 46% of institutions report an increase in new international student enrollment, 12% indicate the number to be the same as last year, and 42% report a decrease.

OPT continues to see record growth and gains by another 12% in 2024/25:

- OPT is an important opportunity for international students to gain work experience in their fields of study following their degree completion.
- The 12% growth builds on the past two years of growth and is driven by large numbers of international graduate students, particularly in the science, technology, engineering, and math (STEM) fields.
- U.S. institutions report that OPT is important for recruiting international students interested in work experiences (77%) and enabling U.S. businesses to recruit and retain international student talent (70%). Further, 66% of institutions think OPT presents an economic benefit to U.S. businesses.
- 84% of U.S. institutions reported that if OPT was not available, international students would likely look to other destinations for their education abroad experience.

Among all places of origin, India continues to be the highest priority for undergraduate and graduate recruitment:

- Institutions are prioritizing undergraduate outreach in India (65%), Vietnam (58%), China (48%), and South Korea (44%). Graduate recruitment is focused on India (81%), China (43%), Ghana (41%), and Nigeria (41%).
- 84% of reporting institutions indicate that financial support for their international student recruitment efforts was the same or higher than in the previous year.

Methodology

Survey Background and Data Collection

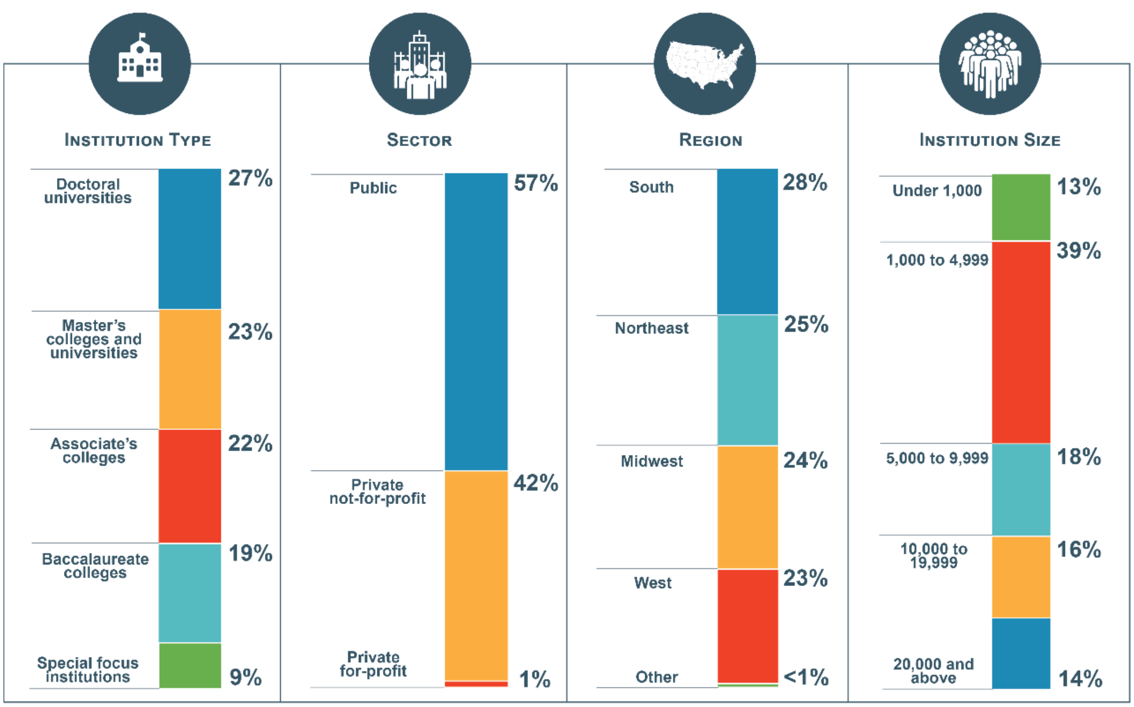
The *Fall 2024 Snapshot* captures 693 valid responses from higher education institutions. The respondent institutions represent a subset of the almost 3,000 U.S. higher education institutions surveyed annually as part of the *Open Doors* International Student Census. The reporting institutions represent 53% of all international students in the *Open Doors Report on International Educational Exchange* (IIE, 2024a).

Eleven partnering higher education associations distributed the *Fall 2024 Snapshot* to their member institutions across the United States from September 26 to October 14, 2024. IIE carries out the survey in cooperation with the American Association of Collegiate Registrars and Admissions Officers, American Association of State Colleges and Universities, American Council on Education, AIRC: The Association of International Enrollment Management, Association of Public and Land-grant Universities, College Board, Community Colleges for International Development, Council of Graduate Schools, National Association for College Admission Counseling, and NAFSA: Association of International Educators.

Respondent Profile

Respondents to the *Fall 2024 Snapshot* reflect a broad range of institutional types and locations from all 50 states, Puerto Rico, and Washington, D.C. Overall, the *Fall 2024 Snapshot* respondents' profile closely mirrors the profile of the institutions that completed the *Open Doors* 2024 International Student Census in terms of institutional sectors and geographic regions (Figure 1).

Figure 1: *Fall 2024 Snapshot* Institutional Representation



Note: Percentages may not sum to 100% due to rounding.

International Students at U.S. Colleges and Universities in Fall 2024

The findings of the *Fall 2024 Snapshot* indicate that the United States continues to be the destination of choice for a growing number of international students, building on three years of increases already noted in the *Open Doors Report on International Educational Exchange.* Students are drawn to U.S. colleges and universities with a substantial increase at the undergraduate level, and there is sustained interest for students to pursue OPT. Data on new international student enrollments indicate there is some stabilization among students studying on their U.S. campuses for the first time.

Total International Student Enrollments at U.S. Higher Education Institutions

In fall 2024, U.S. colleges and universities report a 3% growth in international student totals (Figure 2). While the *Fall 2024 Snapshot* reports on a subset of all U.S. institutions hosting international students, it is interesting to note that among the institutions that report this fall, a 3% increase builds on three years of consecutive growth in student totals.

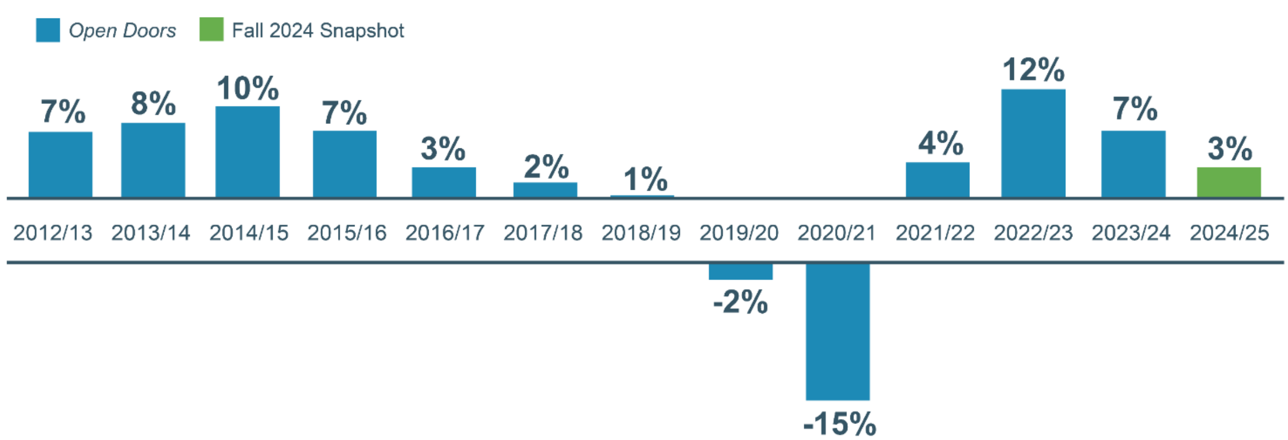
As noted in *Open Doors* 2024, most international students (77%) attend doctoral universities. These institutions report a 2% increase in the *2024 Fall Snapshot*, building on the 5% increase in 2021/22, an 11% increase in 2022/23, and a 5% increase in 2023/24 (IIE, 2024a).

Due to booming interest in graduate programs, master's colleges and universities report significant growth, with *Fall 2024 Snapshot* respondents reporting a 7% increase. This builds on gains of 1% in 2021/22, 22% in 2022/23, and 13% in 2023/24. Several of these institutions' international student populations have doubled since the COVID-19 pandemic and reached all-time highs.

Baccalaureate colleges and special focus institutions also experienced growth according to the *Fall 2024 Snapshot* (+4% and +3%, respectively). Finally, associate's colleges, commonly referred to as community colleges, also experienced a third year of increases, with a 9% increase in fall 2024.

Community colleges were slower to rebound from the COVID-19 pandemic than other institutional types, but three years of increases gives a positive sign for international students seeking affordable education options.

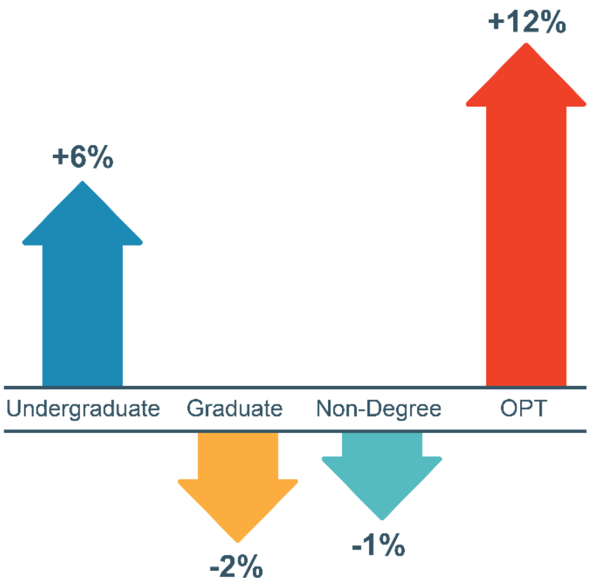
Figure 2: International Students at U.S. Higher Education Institutions



International Students by Academic Level

International student totals at the undergraduate level and OPT increased in Fall 2024 (Figure 3).

Figure 3: Changes in International Student Totals by Academic Level, Fall 2024



International Enrollments. Enrolled international students include those pursuing undergraduate, graduate, or non-degree study, a subset of total international students.

International students pursuing undergraduate study increased by 6%. Undergraduate numbers have lagged behind graduate totals, particularly following the COVID-19 pandemic, as many students chose to defer or postpone their studies due to travel restrictions and health and safety. Also, since undergraduate numbers include four years of study, recent decreases due to the COVID-19 pandemic reduced the pipeline of students entering the system.

In the past three years, in *Open Doors* 2022, 2023, and 2024, increases in the number of students at the first- and second-year levels have begun to replenish the pipeline of international students.

For three years, graduate student enrollments increased rapidly, exceeding undergraduate totals and reaching all-time highs in the 2023/24 academic year. In fall 2024, graduate student enrollments stabilize with a modest 2% decrease. It is important to note that over the past three years, international graduate numbers have nearly doubled, and this modest change still puts graduate numbers at record highs. Notably, the National Student Clearinghouse's Research Center also reported a decline among international graduate students in their preliminary fall 2024 higher education enrollment data.

Finally, the total number of international students pursuing non-degree study, which includes short-term exchanges and intensive English programs, has also decreased slightly by 1%. There was a significant decline in non-degree study amid the height of the COVID-19 pandemic (-64%). Since then, the number of non-degree students has fluctuated, first with large increases in 2021/22 and 2022/23, followed by a 12% decrease in 2023/24.

Optional Practical Training. The number of students staying in the United States to gain practical work experience after graduation on Optional Practical Training (OPT) grew by 22% to 242,782 students in 2023/24, according to *Open Doors*. This was the highest level ever of students on OPT in *Open Doors* history.

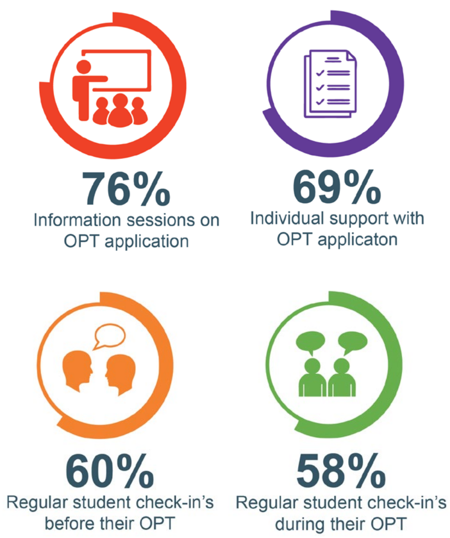
The *Fall 2024 Snapshot* signals a continued increase in OPT at 12%. Growth in the number of graduate students in the United States over the past three years have buoyed OPT numbers.

Most graduate students (64%) pursue STEM fields in the United States, making these students eligible for the STEM OPT Extension. Since 2016, the STEM OPT Extension has allowed STEM international students to extend their stay in the United States from 17 to 24 months.

As OPT has continued to grow, according to *Open Doors*, we included several questions in the *Fall 2024 Snapshot* to learn more about this benefit from the perspectives of U.S. respondent institutions.

U.S. institutions are deeply committed to supporting OPT for their students, because they see the value of this component as a part of the overall international education experience (Figure 4). U.S. college and universities provide substantive support to students on OPT, including information sessions, support for the application, and regular student check-in's before and during international students' OPT.

Figure 4: Institutional Support for International Students Before and During OPT



We also asked U.S. institutions about the perceived benefits of OPT to the United States. (Figure 5). Most U.S. institutions noted the value of OPT for recruiting international students interested in work experiences (77%) and enabling U.S. businesses to recruit and retain international student talent (70%). Further, 66% of institutions think OPT presents an economic benefit to U.S. businesses. Finally, a majority of U.S. institutions (67%) did perceive the value of

Figure 5: U.S. Institutions' Perspectives on OPT Benefits

OPT in providing a path to international students to possibly obtain work in the United States after their OPT, as some employers do sponsor work visas for their international students once OPT expires.

As OPT numbers have been growing, so have been the discussions about possible restrictions on OPT. As such, we asked in the *Fall 2024 Snapshot* about the risk to removing OPT as a benefit to international students, and whether this would affect the U.S.'s competitive edge as an education host.

Notably, 84% of U.S. institutions reported that if OPT was not available, international students would likely look to other destinations for their education abroad experience. It is clear to many of these institutions that for most international students, this work experience is very attractive and complements their academic study.

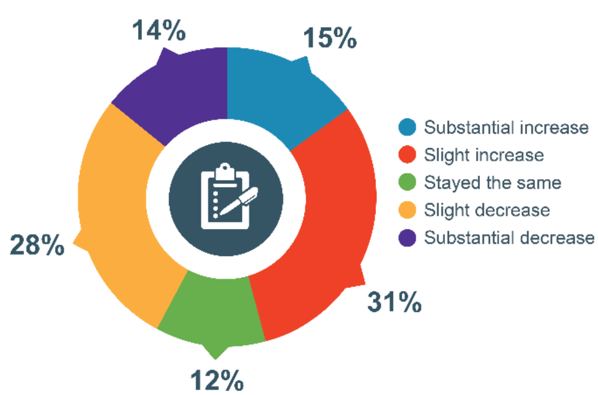
That is also why OPT is included in the full international student total, because it is an integrated component within an international student’s education experience in the United States.

New International Student Enrollments

U.S. institutions that report to the *Fall 2024 Snapshot* show a slight decline in new enrollments of international students who are studying at their institution for the first time. In fall 2024, institutions indicate a decrease of 5% in students beginning study at their institution.

Of reporting institutions, 46% suggest that their new international enrollments are slightly or substantially higher than the previous year, with an additional 12% indicating that new enrollments are about the same as in previous years (Figure 6). In future years, we may see new enrollments stabilize with minor fluctuations, as was historically the case when looking at mobility flows before the COVID-19 pandemic. At the same time, international student enrollment may be affected by institutions and their efforts to build more capacity for international students.

Figure 6: Changes in New International Student Enrollments, Fall 2024



In addition, when collecting data on overall new enrollment patterns in the *Fall 2024 Snapshot*, U.S. institutions report increases in new enrollments for the top places of origin. This provides insight into whether students from these top places of origin will increase in the 2024/25 academic year. More than 4 out of 10 colleges and universities report increases in international students from Nepal, Vietnam, Bangladesh, Brazil, Canada, and the United Kingdom. (Figure 7).

Focusing more specifically on international students' two top places of origin, 36% of institutions note increases in new Chinese students, the same as last year (Baer & Martel, 2023). Comparatively, 37% of institutions report increases in new Indian students, a slight decrease from 51% the previous year (Baer & Martel, 2023). This may be an indicator that after three years of significant growth, the number of international students from India may be stabilizing.

The *Fall 2024 Snapshot* indicates we will continue to see steady flows of international students from Asia, Europe, Latin America, the Middle East, and Africa.

Figure 7: Institutions Reporting Increases in New Enrollments by Place of Origin, Fall 2023–Fall 2024

Bangladesh 42%	Brazil 41%	Canada 41%
China 36%	India 37%	Iran 30%
Japan 35%	Mexico 33%	Nepal 53%
Nigeria 37%	Saudi Arabia 20%	South Korea 34%
Taiwan 29%	UK 41%	Vietnam 51%

Factors Driving New International Student Enrollments

Factors Impacting Increases. The vast majority (83%) of all reporting institutions in the *Fall 2024 Snapshot* note multiple factors behind their increases in new international students (Figure 8). More institutions (74%) indicate that active recruitment efforts by their institution are leading to increases. The proportion of institutions noting the need to actively recruit has increased since 2018 (prior to the COVID-19 pandemic) and 2021 (during the COVID-19 pandemic), likely driven by the growing global competition for international students.

Similarly, over half of the institutions (56%) also credit their increases to more active outreach to prospective students. It is no surprise that many U.S. institutions are increasing their active outreach and recruitment to international students through various methods (see next section).

Finally, 35% of institutions still note that their increases are due to rebounds from the COVID-19 pandemic, though this number has decreased in the last three years.

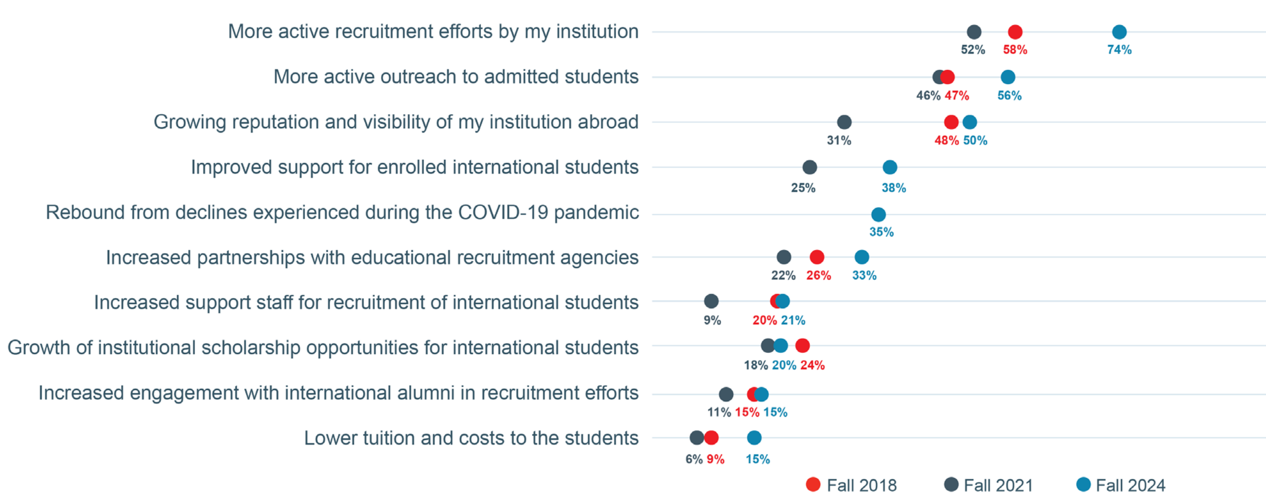
Half of institutions (50%) credit their increases to growth in the reputation and visibility of their institution abroad.

Factors Impacting Declines. Among institutions experiencing declines, most continue to cite visa application process challenges (85%), the cost of U.S. higher education (68%), and student decisions to enroll in other U.S. institutions (57%) as the primary reasons for their declines (Figure 9). These are factors that have traditionally been the primary reasons for enrollment declines.

While visa delays and denials remain the top factor for enrollment decreases in fall 2024, this percentage is closer to data in fall 2018 than in fall 2021, likely due to the effects of the COVID-19 pandemic in 2021 when travel was more restricted. This is because as of fall 2021, many institutions had noted specifically that COVID-19 related issues in visa applications as the leading reasons for declines in new enrollments

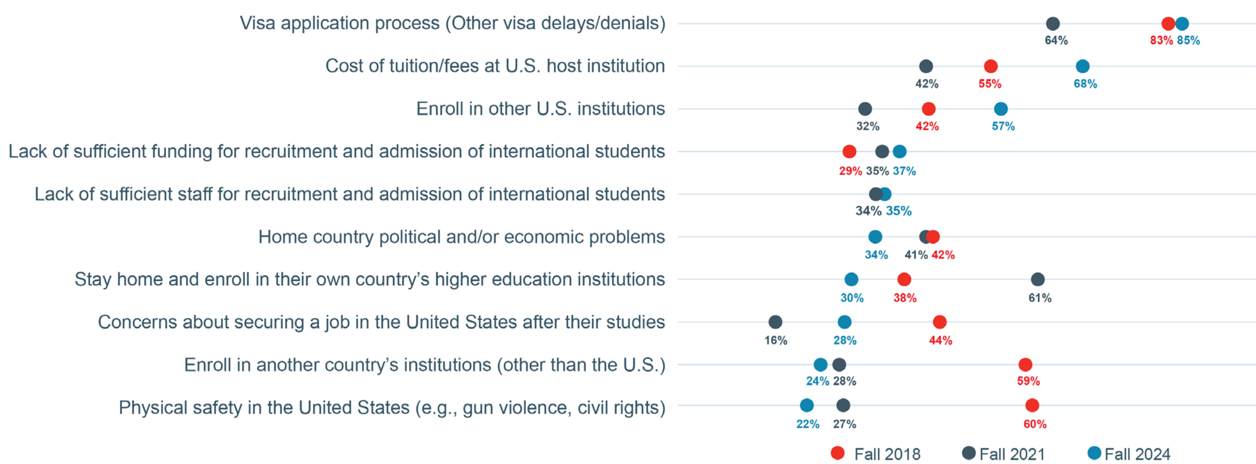
An interesting trend in factors impacting declines of international student numbers is the relative decrease in the number of institutions citing enrollment in another country's institutions as the reason for their lower numbers, decreasing from 59% in 2018 to 24% in 2024.

Figure 8: Top 10 Reasons for Increasing New International Enrollments, 2018 - 2024



It may be that institutions do not perceive global competition as one of the primary factors behind their decreases in comparison to other considerations. Also, the issue of physical safety in the United States is cited by fewer institutions as a reason for declining numbers, decreasing from 60% in 2018 to 22% in 2024.

Figure 9: Top 10 Reasons for Decreasing New International Enrollments, 2018 - 2024



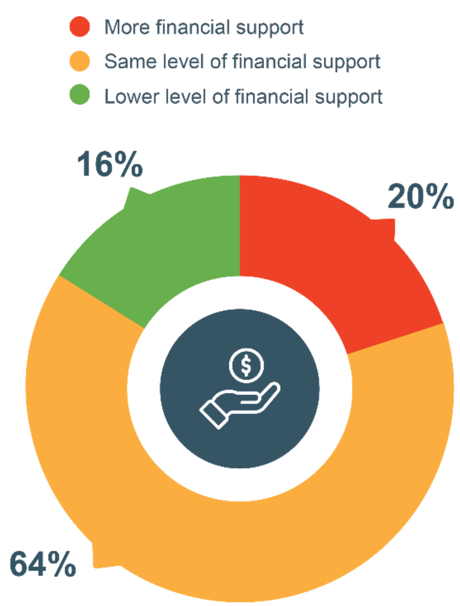
Looking to Next Year's Recruitment Cycle

U.S. institutions looking ahead to future semesters remain engaged to attract 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.

Financial Commitment to International Student Outreach and Recruitment

U.S. institutions continue to invest resources in international student outreach and recruitment. The vast majority of colleges and universities (84%) report that financial support for student recruitment efforts is the same or higher than in the previous year (Figure 10). This is comparable to the number of institutions that noted increased or stable levels of financial support in the prior year (85%) (Martel & Baer, 2023). 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 students.

Figure 10: Financial Support for Outreach and Recruitment, Fall 2024

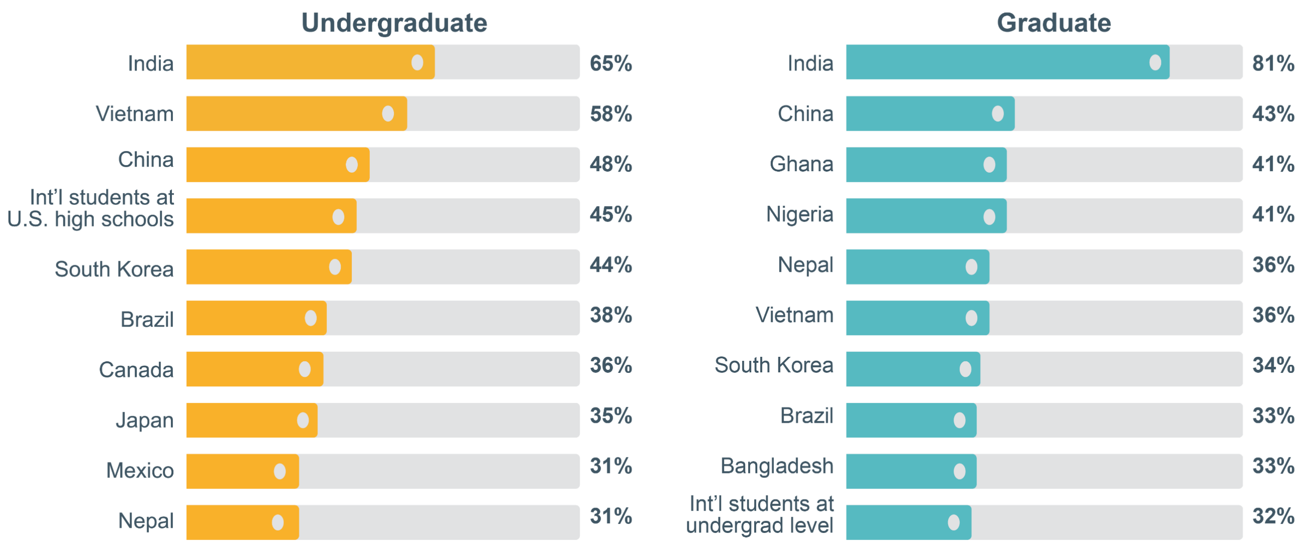


Outreach and Recruitment Priorities

As institutions seek to diversify and attract students from across the world, many U.S. colleges and universities conduct strategic outreach and recruitment efforts in specific places of origin. To better understand overall recruitment trends, we have noted that institutions may have differing areas of focus between undergraduate and graduate students. As many institutions recruit students at both academic levels, colleges and universities cater their recruitment methods to both types of students.

Undergraduate Recruitment. According to *Open Doors* 2024, 39% of students studied at the undergraduate level. In fall 2024, institutions reported prioritizing efforts to recruit undergraduate students from India (65%), Vietnam (58%), China (48%), South Korea (44%), and Brazil (38%) (Figure 11). This is in line with some of the largest senders of undergraduate students to the United States, though it is interesting to note that the largest sender, China, is listed in fourth place. This could indicate that institutions are looking to diversify their strategies for undergraduate markets beyond China, given the continued decline in the number of international undergraduate students (-13%) reported in *Open Doors* 2024. The focus on recruiting Indian undergraduate students also aligns with the strong 13% growth noted in *Open Doors* 2024. Nearly half the institutions (45%) also focus on international students already studying at U.S. high schools.

Figure 11: Institutional Undergraduate and Graduate Recruitment Priorities, Fall 2024



Graduate Recruitment. Most institutions are focusing on India for graduate student recruitment (81%), far outpacing recruitment in all other places of origin (Figure 11). China, Ghana, and Nigeria are also strong markets where more than 40% of colleges and universities report conducting outreach to prospective international graduate students.

The focus on Indian student recruitment aligns with *Open Doors* data, in which India surpassed China as the largest place of origin for international graduate students for the second year in 2023/24. Institutions reported 196,567 international graduate students from India, which reflected a 19% increase over the prior year. With the prospect of continued growth in mobility from India, many institutions (81%) are focusing on recruitment there.

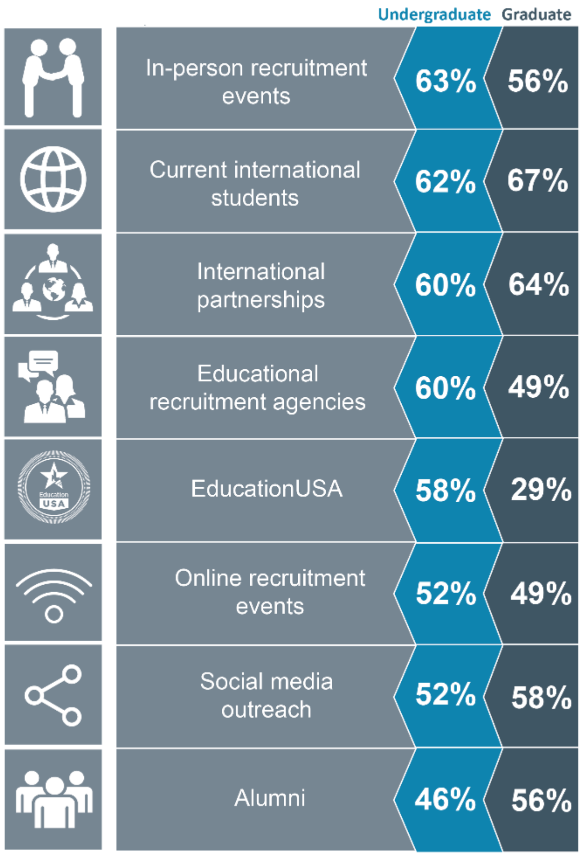
Open Doors noted a 3% decrease in the number of Chinese graduate students in 2023/24 to 122,778 students. However, given that students from China still comprise a significant proportion of all graduate students in the United States (24%), nearly half (43%) of institutions continue to prioritize recruitment in China. As confirmed in *Open Doors* (IIE, 2024a), there was a notable (13%) increase in international students from Sub-Saharan Africa in 2023/24, building on the 18% increase in 2022/23. U.S. institutions are prioritizing recruitment in the region, in countries such as Ghana (41%) and Nigeria (41%). Finally, many institutions (32%) are conducting outreach to international students already enrolled in U.S. undergraduate programs for continued graduate study, as this is a natural pipeline for students to remain in the U.S. higher education system for further academic opportunities.

Institutions Leverage Multiple Sources to Recruit International Students

To better analyze the recruitment of international students in the United States and globally, the *Fall 2024 Snapshot* also collects data about the resources that U.S. higher education institutions leverage to recruit international students (Figure 12).

Of institutions actively recruiting international students, proactively working with current international students for recruitment efforts was the leading area cited to conduct outreach at the graduate level, and the second resource for undergraduate recruitment. Current international students can often provide personal, authentic testimonials about how international students can succeed on their campus and in the United States.

Figure 12: Resources Leveraged for International Recruitment, Fall 2024



Following the COVID-19 pandemic, many institutions have returned to in-person recruitment events, with 63% of institutions using these events for undergraduate recruitment and 56% citing this as an engagement tool for graduate students. These numbers reflect increases from spring 2024, when 57% noted this as a tool for undergraduate student recruitment and 54% at the graduate level (Martel, 2024).

Even with the return of in-person travel, many institutions have retained the online recruitment offerings developed amid the COVID-19 pandemic. Approximately 50% of institutions reported continuing to provide online recruitment events, and more than 30% offered virtual campus visits. The continuation of these online options allows institutions with more limited travel budgets to connect with students they may not otherwise have been able to reach.

Institutions also cite U.S. government resources as popular recruitment resources, with more than half (58%) of colleges and universities leveraging EducationUSA for undergraduate recruitment and 29% for graduate student outreach.

EducationUSA is a U.S. Department of State network that promotes U.S. higher education to students worldwide by offering accurate, comprehensive, and current information about opportunities to study at accredited postsecondary institutions in the United States (U.S. Department of State, 2024). In addition, EducationUSA provides services to the U.S. higher education community to help institutional leaders meet recruitment and campus internationalization goals by offering resources such as the *Global Guide*, *recruitment fairs*, *student mobility fact sheets* that highlight *Open Doors* data and population statistics, and a network of more than 430 international student advising centers in more than 175 countries and territories.

With over 80% of college-age students using social media, many colleges and universities continue to engage international students through social media (52% at the undergraduate level and 58% at the graduate level) (Pew Research Center, 2021). U.S. colleges and universities run social media campaigns that showcase campus life, provide virtual tours, and give insights into the achievements of students, faculty, and alumni. As institutions work to leverage social media effectively and authentically across platforms and languages, recent industry conferences, such as the NAFSA Conference and the EducationUSA Forum, have dedicated sessions to help international education professionals better use these platforms.

In addition, the #YouAreWelcomeHere campaign, advanced nationally by Temple University, continues, with more than 400 higher education institutions and organizations using this hashtag to promote that all international students are welcome to study in the United States (#YouAreWelcomeHere, 2024). Building upon the success of the social media campaign, more than 50 colleges and universities committed to providing scholarships to international students through the #YouAreWelcomeHere national scholarship program.

While an online presence is increasingly important, many students and parents may still value one-on-one, in-person connections. In addition to in-person recruitment events, 6 out of 10 (60%) institutions cite using educational recruitment agencies at the undergraduate level and nearly half (49%) at the graduate level.

Since institutions are leveraging these agencies to enroll international students, this year's *Fall 2024 Snapshot Survey* collected data on the proportion of anticipated international student enrollment through educational recruitment agencies for the second time. Among institutions using agencies, 29% anticipated that 11% to 20% of their incoming international cohort would be recruited through agencies. Approximately 27% of institutions expected between 5% and 10% of new enrollment, and 44% cited that less than 5% of their incoming enrollment totals would be through recruitment agencies.

A smaller proportion of institutions also noted leveraging the U.S. Commercial Service at the U.S. Department of Commerce, with approximately 17% using their services for undergraduate and graduate outreach. The U.S. Commercial Service has education and training services industry specialists who provide resources on the global competitiveness of the U.S. education industry, suggest ways to expand market access, and offer recommendations on digital strategies for outreach to different markets (International Trade Administration, 2024a). They also convene the Study State Consortia, which brings institutions within a state together to promote that state as a study destination for international students (International Trade Administration, 2024b). In line with this, the U.S. Commercial Service launched the USA: A Study Destination initiative to boost U.S. education exports by promoting the United States as a premier destination for international students. The initiative supports the state consortia and provides additional resources to recruit international students per their economic strategies.

Conclusion

The findings from the *Fall 2024 Snapshot* provide an understanding of the current, strong state of U.S. higher education institutions' commitment to international student mobility. This year's *Fall 2024 Snapshot* findings highlight a continued growth of international student totals in the 2024/25 academic year, particularly at the undergraduate level and OPT. Study at the graduate level is stabilizing at much higher levels following three years of rapid increases.

Although the full picture of the 2024/25 academic year will be available in November 2025 with the release of *Open Doors* 2025, these early indications signal that international student enrollment is likely to continue to grow. Many institutions recognize the benefits of having international students in their diverse student body, with international students contributing approximately $50 billion to the U.S. economy as of 2023 (U.S. Department of Commerce, 2024). U.S. institutions also value the perspectives and unique viewpoints that international students bring to the classroom and campus communities. Institutions also emphasize the benefits of hosting international students on OPT for students, universities, industries, and the U.S. economy.

The findings of the *Fall 2024 Snapshot* indicate several areas of focus as U.S. colleges and universities look to future academic semesters and international student trends:

- **There is growth at the undergraduate level, and OPT, as graduate level stabilizes, and non-degree fluctuates.** The findings of the *Fall 2024 Snapshot* confirm that international students are pursuing study in the United States at a higher level overall than in the previous academic year, primarily due to the 6% increase at the undergraduate level. The number of graduate students declined slightly representing a stabilization in comparison to the prior year. The overall effect of an increase in enrollment showcases that international students continue to be interested in studying at the wide array of higher education institutions throughout the United States
- **OPT continues to see record growth and gains in 2024/25, and U.S. colleges and universities continue to build support for students on OPT.** This year's 12% growth for OPT builds on the past two years of growth and is driven by large numbers of international graduate students. U.S. higher education institutions recognize the value of OPT, both for students' individual benefit in gaining applied skills in their field of study, as well as through the economic benefits to institutions and communities. Given the strong interest in OPT, U.S. higher education institutions remain committed to providing support for international students interested in this option, including information sessions, application resources, and regular student meetings before and during international students' OPT.
- **International student trends indicate diversity among leading places of origin**. International student numbers are increasing among students from diverse leading places of origin. The findings of the *Fall 2024 Snapshot* indicate a large proportion of institutions reporting increases in new enrollments from Nepal, Vietnam, Bangladesh, Brazil, Canada, India, and the United Kingdom. It is encouraging to see continued strong potential growth

among students from India, which will likely continue to affect the leading places of origin of international students in the coming year.

- **The need for active international student recruitment remains strong**. With global competition for international students continuing, U.S. higher education institutions will need to continue to actively recruit international students. Institutions with increases in international student enrollment continue to highlight the importance of their own investment in recruitment along with building the brand of their institution.

As we look ahead to the coming academic year, we note that the trends will continue to evolve regarding international student numbers. The fall 2024 semester provides a critical perspective on the latest data and will help researchers and practitioners map this important time and its effects on the international education field.

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