“Education is the most powerful weapon which you can use to change the world.”

NELSON MANDELA
EXECUTIVE SUMMARY

International students create jobs, drive research, enrich our classrooms, strengthen national security, and become America’s greatest foreign policy assets. Yet new international student enrollment is down dramatically across the United States.

- International students contributed $39 billion to our economy last year.
- During the 2017–2018 academic year, international students created or supported more than 455,000 jobs. That’s three jobs created for every seven international students who chose to study here.
- International education is the fifth-largest U.S. service sector export.
- The most recent U.S. Department of State Open Doors® report, published by the Institute of International Education, reported a 6.6% decline in new international student enrollments; this follows a 3.3% decline in new enrollments the prior year and marks the first time America has seen a two-year decline.
- Data show that international students and scholars feel less safe and less welcome in the United States than the previous year surveyed.
- University and industry leaders acknowledge that anti-immigrant rhetoric and policies contribute to a chilling effect on international study in the United States.
- Competitors like Canada, China, and Australia are recruiting and attracting more international students and scholars and benefiting at the expense of the United States. For example, in 2014, China surpassed the United Kingdom and the United States as a top destination for international students from Africa — and it continues to draw increasing numbers of students from the African continent.

When we discourage or turn away international students, we lose much more than the students themselves... We lose their inventions and innovation, their collaborative input and their contributions to our communities. In time, we will lose our centers of technical excellence, which will, inevitably, migrate to places where every talented contributor is welcome. Ultimately, we will lose not just our status as a global leader, but the very identity that earned it.

Dr. Martha E. Pollack

President
Cornell University

SOURCES
tinyurl.com/wapo-20181113-WelcomeStudents
tinyurl.com/cnn-20190308-Pollack
New international student enrollment is down 6.6%, double the decrease from the previous year. These decreases are in part due to several troubling federal policy changes that have altered the perception of the United States as a welcoming destination for international students, scholars, and researchers.

It’s shortsighted to think of this issue solely in terms of revenue: International students and scholars also spur American innovation and growth ... the United States can’t afford to close the pipeline of talent and tuition that supports its education system and drives its economic future.

Education — particularly higher education — is a major American export .... When we provide a service that leads to foreigners sending money into the U.S., that’s an export with exactly the same economic effects as when we sell soybeans or coal abroad.

Recent data show it would be unwise to take for granted that outstanding students across the globe will come to America without regard to U.S. government policies.

Students are still studying outside their home country. They’re just studying in other places.

A Study Portals survey of 1,300+ international and American students gauged students’ thoughts after the 2016 U.S. presidential election.

International respondents indicated the main reason for their decreased desire to study in the United States is that they perceive the United States to be less welcoming toward international students.
LEADERS AGREE THAT INTERNATIONAL STUDENTS ARE AN ASSET TO AMERICA

I can think of no more valuable asset to our country than the friendship of future world leaders who have been educated here.

Colin L. Powell  
RETIRED  
FOUR-STAR GENERAL  
UNITED STATES ARMY

International students learn about the best of America by studying side-by-side with our students from cities, towns and rural communities in the Central Valley and throughout California — inspiring global interconnectedness and making international education the perfect incubator for diplomacy. Furthermore, knowledge of American culture and our political and social structures serves a diplomatic as well as educational function.

Dr. Marjorie Zatz  
VICE PROVOST AND DEAN OF GRADUATE EDUCATION AND SOCIOLOGY PROFESSOR  
UNIVERSITY OF CALIFORNIA MERCED

Inconsistent government action and uncertainty undermines economic growth and American competitiveness and creates anxiety for employees who follow the law. In many cases, these employees studied here and received degrees from U.S. universities, often in critical STEM fields.

BUSINESS ROUNDTABLE CEOS INCLUDING

Tim Cook  
CEO, APPLE

Chuck Robbins  
CEO, CISCO SYSTEMS

Indra K. Nooyi  
FORMER CEO, PEPSICO

SOURCES  
tinyurl.com/USDoS-Powell-quote  
tinyurl.com/diversedu-20181023-Zatz  
tinyurl.com/BR-CookRobbinsNooyi-quote  
tinyurl.com/wapo-20181213-Rampell
Higher education has long been one of this nation’s greatest economic assets, attracting the brightest and most promising minds from around the world, fueling science and innovation, creating jobs and spreading economic prosperity. Some of the most successful start-up companies in the United States had at least one immigrant founder, including Uber and SpaceX. Two of America’s most iconic software companies, Microsoft and Google, are led by [people from India] who came to the United States as international students.

Ángel Cabrera
President
George Mason University

The latest analysis by NAFSA: Association of International Educators finds that the 1,094,792 international students studying at U.S. colleges and universities contributed $39 billion and supported more than 455,000 jobs to the U.S. economy during the 2017 – 2018 academic year. According to a 2019 report from the Niskanen Center, experiential learning opportunities like Optional Practical Training (OPT) for international students lead to increased innovation and higher average earnings, while not costing U.S. workers their jobs. According to a 2018 report from the National Foundation for American Policy, nearly one-quarter of the founders of $1 billion U.S. start-up companies first came to America as international students.
INTERNATIONAL STUDENT MOBILITY IS GROWING—BUT U.S. MARKET SHARE IS DECREASING

According to Project Atlas data, since 2001, the number of students pursuing education outside of their home country has more than doubled, from 2.1 million to 5.0 million, while the U.S. share of this globally-mobile student population dropped, from 28% in 2001 to 22% in 2018.

NAFSA estimates the combined 10% decline of new international student enrollment — between fall 2016 and fall 2017 — cost the U.S. economy $5.5 billion and more than 40,000 jobs.

International Student Enrollment Competitor Countries Market Share

<table>
<thead>
<tr>
<th>Country</th>
<th>2001</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>UK</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Germany</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>France</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Australia</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Canada</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>China</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Russia</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

New International Student Enrollment in the United States

<table>
<thead>
<tr>
<th>Year</th>
<th>New International Student Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007-08</td>
<td>50,000</td>
</tr>
<tr>
<td>2008-09</td>
<td>100,000</td>
</tr>
<tr>
<td>2009-10</td>
<td>150,000</td>
</tr>
<tr>
<td>2010-11</td>
<td>200,000</td>
</tr>
<tr>
<td>2011-12</td>
<td>250,000</td>
</tr>
<tr>
<td>2012-13</td>
<td>300,000</td>
</tr>
<tr>
<td>2013-14</td>
<td>350,000</td>
</tr>
<tr>
<td>2014-15</td>
<td>300,000</td>
</tr>
<tr>
<td>2015-16</td>
<td>250,000</td>
</tr>
<tr>
<td>2016-17</td>
<td>200,000</td>
</tr>
<tr>
<td>2017-18</td>
<td>150,000</td>
</tr>
</tbody>
</table>

SOURCES
tinyurl.com/iie-CurrentInfographics  tinyurl.com/iie-OpenDoors
WHAT’S CAUSING THIS?

Institutions continue to report that prospective international students and their families are concerned about U.S. federal policies and rhetoric on immigration, along with apprehensions of personal safety and tense race relations.

Top 12 Reasons for Declining International Students Enrollment

<table>
<thead>
<tr>
<th>Reason</th>
<th>Fall 2016</th>
<th>Fall 2017</th>
<th>Fall 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visa application process or visa delays/denials</td>
<td></td>
<td>68%</td>
<td>83%</td>
</tr>
<tr>
<td>Social and political environment in the United States</td>
<td>15%</td>
<td>57%</td>
<td>60%</td>
</tr>
<tr>
<td>Enroll in another country’s institutions (other than the United States)</td>
<td>19%</td>
<td>54%</td>
<td>59%</td>
</tr>
<tr>
<td>Cost of tuition/fees at U.S. host institution (including financial assistance issues)</td>
<td>51%</td>
<td>55%</td>
<td>57%</td>
</tr>
<tr>
<td>Feeling unwelcome in the United States</td>
<td>49%</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Securing a job in the United States after their studies</td>
<td>41%</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>Physical safety in the United States (e.g., gun violence, civil unrest)</td>
<td>12%</td>
<td>33%</td>
<td>44%</td>
</tr>
<tr>
<td>Enroll in other U.S. institutions</td>
<td>39%</td>
<td>42%</td>
<td>45%</td>
</tr>
<tr>
<td>Changes in foreign government-sponsored scholarship programs (e.g., Saudi Arabia)</td>
<td>41%</td>
<td>41%</td>
<td>42%</td>
</tr>
<tr>
<td>Political and/or economic problems in home country</td>
<td>22%</td>
<td>40%</td>
<td>42%</td>
</tr>
<tr>
<td>Stay home and enroll in their own country’s higher education institutions</td>
<td>14%</td>
<td>38%</td>
<td>39%</td>
</tr>
<tr>
<td>Lack of sufficient institutional funding for recruitment and admission of international students</td>
<td>22%</td>
<td>29%</td>
<td></td>
</tr>
</tbody>
</table>

A significant proportion of institutions report that the U.S. social and political environment (60%) and feeling unwelcome in the United States (48.9%) are factors contributing to new international student declines. Colleges and universities also cite a significant increase (11%) in concerns about physical safety in the United States, including gun violence and civil unrest (43.6%).

They [international students] see the headlines and they think that they’re no longer wanted in the United States.

Lawrence Schovanec
PRESIDENT
TEXAS TECH UNIVERSITY

SOURCES
tinyurl.com/reut-20181112-FewerStudents
tinyurl.com/iie-InternlEnrollmentsFall

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U.S. AT RISK OF LOSING THE BENEFITS OF TALENTED INTERNATIONAL STUDENTS

_The United States is in a competition for global talent._ We are losing our market share of international students and scholars, while many other countries are proactively introducing national policies and marketing strategies in order to attract these talented individuals.

**AUSTRALIA**

Students can work for up to 18 months after graduation. Graduates of certain high-need occupations are able to work longer, for up to four years. In 2018, Australia saw an **increase of 15%** in international student enrollment.

**CANADA**

Following graduation, foreign students can work for a time period equal to the period they studied in Canada, up to a maximum of three years. Work experience that is considered “skilled” helps graduates qualify for legal residence in Canada. In 2017, international enrollment **increased by 20%**.

**CHINA**

Foreign students graduating with a master’s degree or above are immediately eligible to apply for work visas within one year of graduation. In 2008, China set a target of bringing half a million foreign students to its shores by 2020; in 2017, China is close to hitting its target three years early, with a **10% increase** over 2016 enrollment numbers.
INTERNATIONAL STUDENTS AND SCHOLARS ARE GREAT FOR AMERICA

**MARZIEH AYATI**  🇨🇮 IRAN  
*Case Western Reserve University*

Marzieh Ayati is an award-winning computer scientist who studied at Case Western Reserve University and now researches biological data to develop new medical treatments. She currently teaches computer science at the University of Texas Rio Grande Valley and works with middle and high school students to foster their development in the STEM fields.

**YU TAKAHASHI**  🇯🇵 JAPAN  
*Embry-Riddle Aeronautical University and University of Colorado Boulder*

A key member of NASA's OSIRIS-REx team, Takahashi was inspired by the American Mars rover missions. He studied at Embry-Riddle Aeronautical University and the University of Colorado Boulder to gain the skills necessary to work at NASA. Now, his job is to safely navigate NASA spacecraft around planets and asteroids.

**HIYAM AFEEF**  🇲🇻 MALDIVES  
*Embry-Riddle Aeronautical University*

During her education at Embry-Riddle Aeronautical University, Afeef forged lasting connections with her U.S. peers, strengthening understanding between the United States and the Maldives. After graduating, Captain Afeef became the first female seaplane captain in Maldivian history.
JERMAINE RODNEY  🇯🇲  JAMAICA

*Western State Colorado University*

After studying at Western State Colorado University, Rodney founded Jermaine’s, a coffee shop on Main Street in Gunnison, Colorado, which employs eight people and was awarded Best New Business in 2017 by the Gunnison Chamber of Commerce. Heavily involved in community work, Rodney also mentors children locally and has raised over $20,000 for local and international charities.

NANSHU LU  🇨🇳  CHINA

*Harvard University*

Lu is recognized as one of 35 Innovators Under 35 by the *MIT Technology Review*. She used her education from Harvard University to develop a cutting-edge, malleable, electronic tattoo that can monitor a patient’s cardiovascular health in the United States. Now, she is a researcher and associate professor of biomedical engineering at The University of Texas at Austin.

MIRCEA HANDRU  🇷🇴  ROMANIA

*Tiffin University*

Recruited to play soccer, Handru earned a BA and MBA from Tiffin University and today is executive director of a mental health and recovery services nonprofit in northern Ohio. He is actively working to improve available local mental health services and to combat Ohio’s opioid drug epidemic.
CASE STUDY

BECOMING DESTINATIONS OF CHOICE

Canada

Perhaps no country has been taking more advantage of the shifts in international student mobility than Canada, where politicians and university leaders alike have seized on the opportunity to brand the country as a proudly multicultural, welcoming destination. The country hosted 494,525 students in 2017, surpassing a national target of hosting 450,000 international students by 2022, five years early. Canada has comparatively friendly international student policies, including expedited visa processing for certain qualifying students. It also offers post-study work visas that can last up to three years and have made it easier for international students to immigrate.

India

The Study in India initiative launched in April 2018 is designed to attract 200,000 international students to Indian university campuses by 2023. Based on their academic scores, students will be offered full or partial scholarships. Students from developed countries like the United States and Europe will be targeted for short-term and student exchange programs.

International students are being actively recruited to Canada and India, but not the United States.

- In 2017, international enrollment in Canada increased by 20%, while U.S. international student enrollment increased just 1.5%.
- While India sends the second highest number of students to U.S. colleges and universities, fewer Indians are choosing to study here.
- In 2014, 2015, and 2016, enrollment from India experienced double-digit growth (29.4%, 24.9%, and 12.3%, respectively). However, growth has been slowing — and by 2017, grew by only 5.4%; a drop in graduate student enrollment (down 8.8%) contributed significantly to the slowdown.
Chinese investment in Africa is strategic and forward-facing, while the United States misses limitless opportunities for collaboration.

- The United States has traditionally viewed China as a “source or sending” country of international students to the United States. However, China is rapidly becoming a major host country. This is a significant shift that has occurred as China has launched its Belt and Road Initiative.

- Many may be aware of the massive Chinese investment in infrastructure and jobs on the African continent. What is less known is China’s significant investment in educational scholarships and recruitment of African international students.

**CASE STUDY**

**EXERTING ITS INFLUENCE IN THE WORLD**

**China**

In 2014, China quietly surpassed the United Kingdom and the United States as a top destination for international students from Africa—and it continues to draw increasing numbers of students from the continent.

China’s place as a top destination for African international students is the product of a concerted effort. A multipronged approach actively promotes Chinese culture and language diffusion throughout Africa; supports continent-wide, national higher education efforts; and fosters diverse and dynamic intergovernmental and interinstitutional efforts.

In 2000, a newly formed Forum on China–Africa Cooperation (FOCAC) sought to establish a framework for China to coordinate its multiple diplomatic relationships with African nations. The forum includes China and, since 2017, every African nation.

Simultaneously, the United States’ influence on African students is receding, according to many experts.

**SOURCES**

tinyurl.com/NAFSA-IEM-20190506  
tinyurl.com/wenr-20170307-Gu

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WHAT CONGRESS CAN DO TO KEEP AMERICA COMPETITIVE

While trends in international student enrollment are alarming, bipartisan consensus in Congress is growing to reverse this dynamic. Members of Congress on both sides of the aisle agree that America becomes more competitive by attracting the world’s best talent. Through social media, congressional hearings, floor statements, letters to the administration, legislation, and oversight hearings, these leaders are articulating the value that international students and scholars bring to our communities. However, policy changes must be enacted to positively change course. Only then will we have a United States where the best and brightest are truly able to contribute to the economy and innovation.

America needs a national recruitment strategy to proactively attract talented individuals.

Congress should allow international student visa applicants to express interest in staying in the United States after graduation.

Congress should support bills that make us a more welcoming nation. We urge Congress to protect duration of status and practical training and make more green cards available for students who graduate from our universities.

Learn more about NAFSA’s policy recommendations at nafsa.org/welcometosucceed
INTERNATIONAL STUDENTS AND SCHOLARS

CREATE JOBS
DRIVE INNOVATION
ENRICH OUR CLASSROOMS
STRENGTHEN NATIONAL SECURITY
BECOME AMERICA’S GREATEST FOREIGN POLICY ASSETS
ARE GREAT FOR AMERICA

For more information, visit nafsa.org/policy

#WelcomeToSucceed