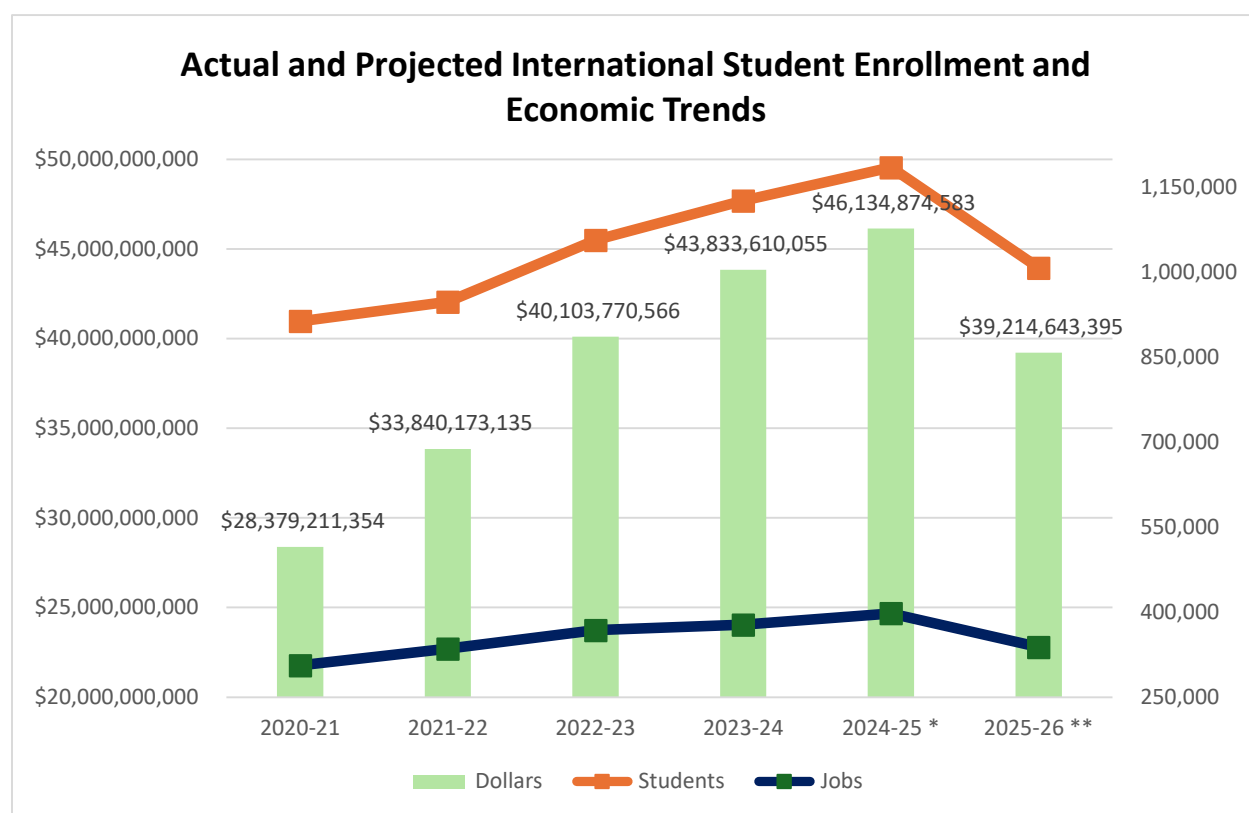


# Fall 2025 International Student Enrollment Outlook and Economic Impact

*Possible 30–40 percent decline in new international student enrollment*

## Overview

Preliminary projections based on SEVIS and State Department data show potential shifts in international student enrollment and their contributions to the U.S. economy for Fall 2025. While SEVIS and visa issuance data early in 2025 suggested flat to modest growth, recent actions such as visa bans and disruptions in processing have introduced significant risks. Scenario modeling based on a 30–40 percent decline in new international student enrollment in the United States this fall predicts a possible 15 percent drop in overall enrollment. **This would result in nearly \$7 billion in lost revenue and more than 60,000 jobs.**



## Projections

	Total International Students (incl OPT)	Dollars Contributed	Jobs Supported
2023–2024 Actuals	1,126,690	\$43.83B	378,175
2024–2025 Preliminary Estimate*	1,185,841	\$46.13B	398,029
2025-2026 15% Projected Reduction**	1,007,965	\$39.21B	338,325

\* 2024-2025 projected estimation based on SEVIS and State Department annual J-1 report at 96 percent alignment with *Open Doors* international student enrollment data, to be released in November 2025. \*\*2025-2026 15 percent enrollment decline based on current visa restrictions, State Department monthly visa issuance statistics, and SEVIS by the Numbers data for active students.

## What's Driving the Decline?

- **Visa Interview Suspension:** Between May 27 and June 18, 2025, student visa interviews were paused during the peak issuance season for students seeking to enroll in a U.S. institution this fall. As announced on June 18, the resumption of interviews carried a directive that U.S. consulates implement new social media vetting protocols and restore appointments within five days—with scant guidance provided.
- **Limited Appointment Availability:** There are reports of limited/no appointments for international students in India, China, Nigeria, and Japan. India and China are the top two international student sending countries to the United States; Nigeria is seventh and Japan is 13th.
- **Downward Visa Trends:** F-1 issuance is down 12 percent from January to April 2025 and down 22 percent in May 2025 compared to May 2024. June 2025 F-1 issuance has not been published but a decrease of 80–90 percent is possible based on the factors identified here.
- **Visa Bans:** Restrictions targeting 19 countries as of a June 4, 2025 executive order, with another 36 rumored to be added, threaten \$3 billion in annual contributions and more than 25,000 U.S. jobs.

**The Bottom Line:** Without significant recovery in visa issuance in July and August, up to 150,000 fewer students may arrive this fall.

## Policy Solutions

To mitigate this devastating outcome, NAFSA urges Congress to direct the State Department to: 1) provide expedited visa appointments and processing for all F-1 and M-1 students and J-1 exchange visitor visa applicants; and 2) exempt F and M students as well as J exchange visitors from the travel restrictions currently banning the entry of nationals from 19 countries while maintaining background checks and vetting required for visa issuance.



## For More Information

To explore a state-by-state analysis of the fall international enrollment projections and anticipated economic decline, visit [nafsa.org/fall2025report](https://nafsa.org/fall2025report).

## Methodology

JB International based its 2024–25 projected enrollment estimation on [SEVIS by the Numbers](#) data and the [State Department’s Bureau of Educational and Cultural Affairs Annual J-1 Exchange Visitor Report](#), which has a 96 percent alignment to [Open Doors](#) international student enrollment data expected in November 2025. The 15 percent enrollment reduction predicted for 2025–26 is based on current visa restrictions, State Department [Monthly Nonimmigrant Visa Issuance Statistics](#) for incoming students (currently available only through May 2025), SEVIS by the Numbers data for active students, and the [NAFSA International Student Economic Value Tool](#) powered by JB International.

### **About NAFSA: Association of International Educators**

NAFSA: Association of International Educators is the world’s largest and most comprehensive nonprofit association dedicated to international education and exchange. NAFSA promotes policies that ensure the continued growth and impact of global learning, cultural exchange, and mutual understanding through study abroad, international student services, and campus internationalization. With a network of more than 10,000 professionals in the field at more than 4,000 institutions in more than 150 countries, NAFSA is committed to fostering a more globally connected and peaceful world. [nafsa.org](https://nafsa.org).

### **About JB International**

JB International is the team behind Trilby Suite, a modern case management platform that helps institutions manage international employees, scholars, and students while meeting complex regulatory requirements. With over 60 years of combined experience in international education and immigration compliance, JB International also leads research and data initiatives that support the field at large. [jb.international/](https://jb.international/)

