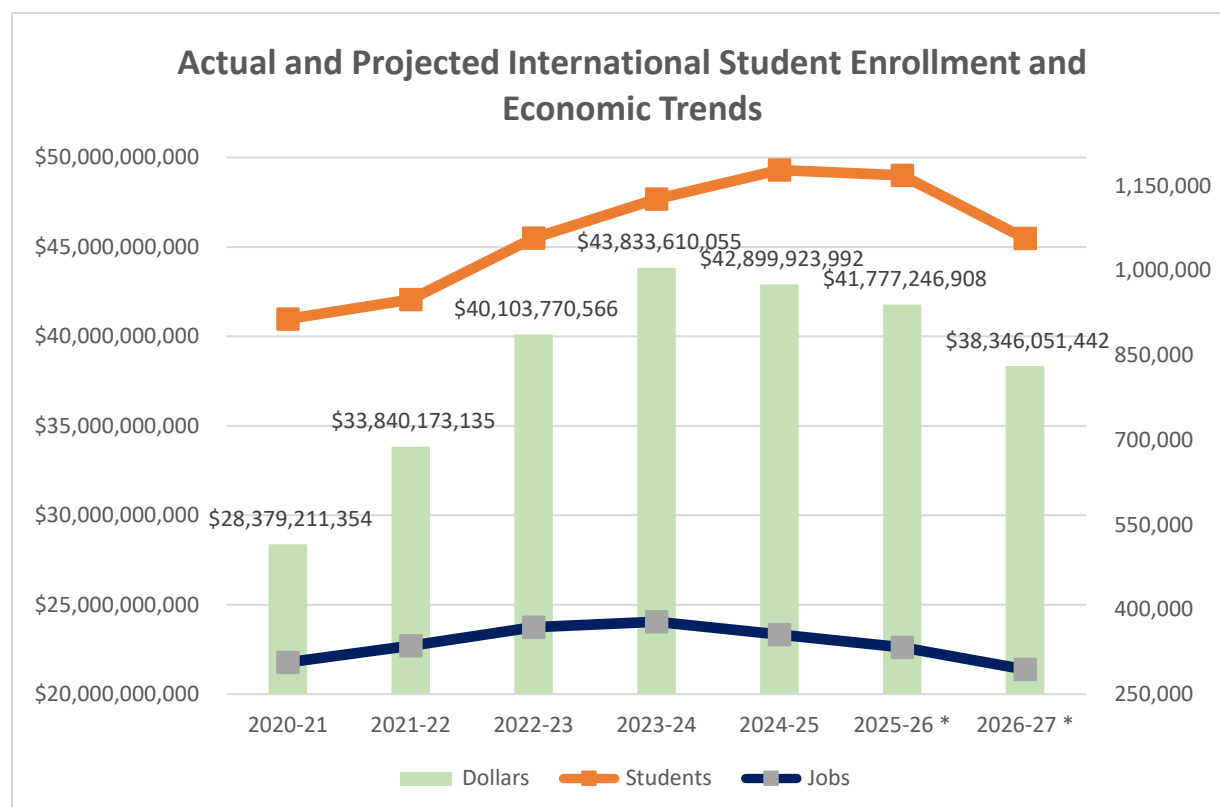


Fall 2026 International Student Enrollment Outlook & Economic Impact

*111,000 fewer international students this fall
at U.S. colleges and universities leading to potential loss of \$3.4 billion*

Overview

Preliminary analysis by NAFSA: Association of International Educators and JB International indicates a projected decline in international student enrollment for Fall 2026, with cascading effects on U.S. economic contribution and jobs supported. This downturn reflects the convergence of several headwinds: declining application volumes, persistent visa appointment bottlenecks, and newly restrictive immigration policy changes. **Our analysis**, based on U.S. institution of higher education responses to IIE's [Spring 2026 Snapshot on International Educational Exchange](#), estimates as many as **111,000 fewer international students at U.S. colleges and universities will result in up to \$3.4 billion in lost revenue and up to 39,000 fewer jobs.**



Mid- and Upper-Range Projections

Scenario	International Students	Dollars Contributed	Jobs Supported
Fall 2024-25 Actuals	1,177,766	\$42.90 Billion	355,736
Fall 2025-26 Projection	1,168,602	\$41.77 Billion	332,939
Fall 2026-27 Mid-Projection	1,104,912	\$39.62 Billion	303,514
Fall 2026-27 Upper-Projection	1,056,884	\$38.37 Billion	293,743

Economic Impacts at a Glance

- The U.S. economy stands to lose up to \$3.4 billion in direct economic contributions from international students in Fall 2026.
- Up to 40,000 U.S. jobs are at risk - a roughly 9 percent reduction from the Fall 2025 baseline.
- Graduate-level enrollment declines are the primary driver of economic losses, particularly among institutions with the largest international student populations.
- Inflation was factored into the analysis, which increases dollar figures but also requires more economic output per job supported. These projections reflect direct economic contributions from enrolled students (does not include students on Optional Practical Training).

What's Driving the Decline?

International Student Application and Enrollment Numbers Declined

Early indicators confirm reduced demand across multiple channels:

- According to recent data collected by the Association of American Universities Data Exchange, international applications to U.S. doctoral programs for this fall declined by 21 percent, fueling a 17 percent drop in international admissions, and contributing to a 15 percent drop in overall doctoral program admissions due to federal research funding uncertainty¹;
- According to the Common App, international submissions fell 9 percent for the 2026-27 cycle, with submissions from India down 14 percent, Ghana down 34 percent, and Nigeria down 17 percent (*note: Nigeria is covered by the current Travel Ban*)²;
- Nearly two-thirds of institutions responding to IIE's Spring 2026 Snapshot survey expect further declines in 2026–27, with some projecting graduate enrollment drops as high as 40 percent.

These application and enrollment trends align with JBI's projection ranges and suggest actual Fall 2026 outcomes may approach or exceed this analysis.

¹ <https://www.aau.edu/newsroom/new-phd-admissions-data-show-threat-us-stem-workforce>

² <https://www.commonapp.org/files/DAR/deadline-updates/2025-26/Common-App-Deadline-Update-2026-March.pdf>

Travel Ban, Visa Appointment and Processing Bottlenecks

Expanded visa ban, and visa appointment wait times and processing continue to prevent admitted students from arriving on time:

- **Visa Bans:** A December 16, 2025, executive order established restrictions targeting 39 countries with no exceptions for F student or J exchange visitor applicants. Countries covered by the ban include Iran and Nigeria, which send large numbers of students to study in the United States
- **FIFA World Cup 2026:** The State Department publicly announced priority visa processing for FIFA World Cup ticket holders traveling to the United States.³ The final game occurred on July 19, well into the traditional “peak” season (May through August) for student and exchange visitor visas. Historically, the Department has prioritized student and scholar visa applications during this peak season, helping ensure timely campus arrivals.
- **Limited Appointment Availability:** There are reports of limited or delayed appointments for international students at consulates in India, China, and across Europe, with many requests for expedited appointments denied. India and China are the top two international student sending countries to the United States.

New Duration of Status (D/S) Rule, Possible Changes to OPT Creates Further Uncertainty

In August 2025, the Department of Homeland Security (DHS) proposed eliminating the longstanding “duration of status” framework for F students and J exchange visitors. On July 17, 2026, DHS published the final rule that, as of September 15, 2026, replaces D/S with a fixed Admit-Until-Date (AUD), creating significant planning uncertainty for prospective students, particularly those considering longer-degree programs or uncertain career trajectories. This compounds the uncertainty caused by the current administration’s continued warnings that it intends to reform the Optional Practical Training program, which is an essential tool to meeting the U.S. labor shortage in key fields, especially STEM.

Policy Solutions

To address this decline, NAFSA urges the administration to:

1. prioritize visa interview availability and processing for all F and M students and J exchange visitors;
2. exempt F and M students as well as J exchange visitors from the current travel ban affecting nationals from 39 countries while maintaining background checks and vetting required for visa issuance; and
3. preserve Optional Practical Training for all F-1 students.

³ <https://www.state.gov/fifa-world-cup-26-visas/>

Congress also should pass legislation to restore the D/S policy, the Keep STEM Talent Act, the Keep Innovators in America Act, and provisions that extend dual intent and create a path to green card for F-1 students included in the Dignity Act.

Sources

JB I based its projected Fall 2026 economic analysis using the following sources: [SEVIS Data Mapping Tool Data](#), [Open Doors 2025](#), [IIE Spring 2026 Snapshot on International Educational Exchange](#), [Common Data Set](#), and the [NAFSA International Student Economic Value Tool](#).

METHODOLOGY

Quartile-Level Model

To apply a quantitative projection based on institutional responses to IIE's *Spring 2026 Snapshot on International Educational Exchange* for the upcoming Fall 2026 enrollments, we responding institutions were grouped into comparable sets to determine a number to apply. Additionally, undergraduate, graduate, and non-degree students were considered separately.

Based on the comprehensive international student enrollment data included in the *Open Doors 2025* report, four quartiles of institutions were established with each quartile representing approximately 1/4th of the total international student population in the United States

Undergraduate enrollment projection shows relatively flat-to-only-modest growth for Quartile 1 institutions, with a more severe possible decline for Quartile 2 of 10-15 percent. The Quartile 3/Quartile 4 groups both suggest declines, but not as severe, in a range of 4-9 percent.

Graduate enrollment shows consistent declines across all quartiles, ranging from -6.75 percent to -15 percent. The disproportionate impact on Quartile 1 and 2 institutions reflects the concentration of effects (larger international cohorts exposed to the same policy shocks).

Data Constraints

Three key methodological limitations affected the precision and reliability of these projections:

IIE Survey Terminology. IIE's *Spring 2026 Snapshot on International Educational Exchange* did not define "slight increase/decline" or "substantial increase/decline" for respondents providing an estimate of their institution's expected Fall 2026 enrollment. To calculate a quantitative estimate using these responses, percentage weights ("significant" = $\pm 15\text{-}30\%$, "slight" = $\pm 2\text{-}7\%$, "about the same" = 0%) were applied and results were averaged by quartile and academic level. This approach introduces inherent variance between institutional interpretations and the applied numerical values.



IIE Survey Response Rate. Between 22 percent and 36 percent of institutions across quartiles responded to the IIE survey. Quartile 4, which represents 1,500+ schools with lower counts of international students, had a response rate of 22 percent, while the 200+ institutions representing 3/4th of the international student population had an overall response rate of 31 percent. Those response rates should normally be statistically viable for this analysis to apply across the grouped institutions. However, there is a risk that those who did not respond to the survey would produce a larger variance from their comparable institutions. Thus, actual results could fall outside the projected range once more comprehensive data becomes available.

Missing Visa Issuance Data. Nonimmigrant visa issuance data has not been published by the State Department since September 2025, removing a key forecasting input that was available for conducting last year's analysis. Without recent visa issuance trends, greater reliance was placed on survey-reported expectations, in combination with other reported trends (cited above), to move forward with applying this early prediction.

Modeling Approach

Projections are derived from responses to international student enrollment questions included in IIE's *Spring 2026 Snapshot on International Educational Exchange*, applied at the institutional level by academic level and enrollment-size quartile. The Fall 2025 baseline was slightly revised from November 2025 estimates, primarily in jobs supported, to serve as the reference point for Fall 2026 calculations. Ranges were generated by applying defined percentage intervals to survey descriptors, averaging by quartile, and extrapolating to the full institutional universe. IIE's *Fall 2026 Snapshot on International Student Enrollment* (conducted later this fall) will provide more definitive enrollment data and allow validation of these early projections.

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/

