DOUGLAS M. BIBBY
NMHC
RESEARCH FOUNDATION

Impact of International Students on U.S. Campuses: Current Landscape and Market Outlook

BY

BONARD

Contents

About NMHC

Based in Washington, D.C., the National Multifamily Housing Council (NMHC) is where rental housers and suppliers come together to help meet America's housing needs by creating inclusive and resilient communities where people build their lives. We bring together the owners, managers, developers and suppliers who provide rental homes for 40 million Americans from every walk of life—including seniors, teachers, firefighters, healthcare workers, families with children and many others. NMHC provides a forum for leadership and advocacy that promotes thriving rental housing communities for all. For more information, contact NMHC at 202/974-2300, e-mail the Council at info@nmhc.org, or visit NMHC's website at www.nmhc.org.

About BONARD

BONARD is an independent market research consultancy specializing in international education and student housing. Through their work, they provide data, develop strategies and assess opportunities to guide investment professionals with scientific precision.

About the Douglas M. Bibby NMHC Research Foundation

In 2016, NMHC formed a nonprofit (501(c)(3)) Research Foundation to produce research that will further support the apartment industry's business interests. The work supported by the Douglas M. Bibby NMHC Research Foundation raises the industry's standard of performance and encourage worldwide investment in the sector. The Douglas M. Bibby NMHC Research Foundation funds unique and original research on a wide range of topics, including issues related to development and redevelopment activity, affordable and workforce housing, demographics, tax policy, regulatory environment and zoning and land use, among others. In 2018, NMHC formed the Student Housing Research Fund as part of the Douglas M. Bibby NMHC Research Foundation to conduct research focused on the student housing industry to address the paucity and narrowness of research in the industry. For more information, visit nmhc.org/research-foundation.

Executive Summary

The U.S. boasts one of the world's largest education systems, with a demonstrated capacity to enroll and support a growing number of international students. Historically, it has been the top destination for international post-secondary students worldwide.

Amid declining domestic enrollment trends, U.S. institutions are increasingly prioritizing international student recruitment, recognizing its critical role in helping ensure institutional financial stability.

International Student Demand for U.S. Education

In the 2023/24 academic year, the U.S. hosted 1,126,690 international students, reflecting a 7% year-on-year increase. Of these, 342,875 were undergraduate and 502,291 graduate students.

The latest enrollment data confirms that the market is experiencing significant shifts in demand and supply distribution:

- **Graduate enrollment driving growth:** As seen across other leading study destinations, graduate programs are increasingly popular due to their cost-effectiveness and career advantages. High undergraduate tuition fees in the U.S., coupled with strong undergraduate systems in many source countries, lead students to prioritize graduate studies. STEM degrees, in particular, offer better job prospects and pathways to residency.
- **Shifts in source markets:** For the first time in 2023/24, India surpassed China as the top source of international students in the U.S. Over the past five years, emerging markets have fueled growth, including India (+111%), Nigeria (+50%), Bangladesh (+99%), Ghana (+136%) and Pakistan (+38%). In contrast, demand from traditional markets such as China and South Korea has plateaued, with student volumes unlikely to return to pre-pandemic levels.
- **Uneven institutional growth:** Private institutions have outpaced public universities in attracting international students. Among the public institutions, larger universities have seen significant growth, while smaller institutions struggle to recruit international students effectively.

Key Factors for Choosing the U.S.

The U.S. remains the top choice for international students thanks to its high-quality education system with globally r enowned universities, cutting-edge research and diverse academic programs. Students also value strong return on investment, with access to scholarships and favorable postgraduation employment opportunities through initiatives like the Optional Practical Training (OPT) program.

On the other hand, visa-related challenges and the overall cost of studying and living in the U.S. create barriers for many students, pushing them to consider alternative destinations.

Executive Summary *cont'd*

Market Outlook

International student demand for U.S. education is expected to remain strong, with a projected annual growth of 1.6% through 2030. Assuming stable immigration and visa policies, the number of international undergraduate and graduate students is anticipated to rise from 845,166 in 2023 to 943,251 in 2030.

Conversely, domestic enrollment is expected to decline, from 24 million in 2022 to 22.7 million by 2030, emphasizing the increasing reliance of U.S. institutions on international students. Graduate programs in particular are expected to drive growth as undergraduate numbers stabilize, with many students preferring to complete their undergraduate studies domestically or regionally through transnational education (TNE) programs.

Emerging markets, including Nigeria, Bangladesh and Pakistan, show strong upward trends in demand. In contrast, traditional markets such as China and South Korea are experiencing long-term declines, with little prospect of recovery to previous levels.

The evolving profile of international students will influence demand for purpose-built student housing in the U.S.

Emerging Trends in Student Housing Preferences

According to U.S. institutions, the demand for luxury in student housing has declined in the post-pandemic era, with students prioritizing affordability and essential amenities over premium features. Privacy has emerged as a critical consideration, driven by increased social anxiety and a preference for private spaces. However, U.S. institutions continue to emphasize the importance of shared spaces to foster social interaction, combat loneliness and build a sense of community.

For undergraduate students, security, proximity to campus and convenience are key priorities. University representatives observed that undergraduates are generally less price-sensitive than graduates, as their expenses are often covered by their parents. However, undergraduate interviewees highlighted that affordability has increasingly become a crucial factor in their decision-making.

Graduate students tend to be cost-conscious and are often willing to commute longer distances to lower their expenses. Privacy is a significant consideration for this group, and they frequently utilize services like online grocery delivery, which allows them to live farther from campus or urban amenities.

Preferred Room Type

When it comes to room types, both groups demonstrate a strong preference for single rooms with shared amenities. Undergraduate students, while favoring single rooms, benefit from double-room options recommended by institutions to encourage social bonding and reduce feelings of isolation.

Graduate students, on the other hand, often opt for apartment-style housing or family rooms, particularly when they have dependents.

Executive Summary *cont'd*

Room preferences also vary by nationality and financial background. For example, Indian graduate students often choose double rooms, while students from more affluent families gravitate toward single or en suite accommodations.

Preferred Amenities

Amenities play a crucial role in shaping student satisfaction. Essential features such as free Wi-Fi, laundry facilities and private or semi-private bathrooms are seen as non-negotiable.

Kitchens are especially important for international students, enabling them to prepare meals that align with their cultural preferences.

Security measures are also a high priority, particularly for undergraduate students and their families. Additionally, there is a growing trend among U.S. institutions to incorporate meditation rooms into housing facilities to accommodate the religious and spiritual needs of a diverse student body.

While gyms and swimming pools are sometimes included, their appeal is contingent on the absence of equivalent free facilities on campus.

Implications for Future Student Housing Design

The evolving landscape of student housing preferences calls for strategic adjustments in design and operations. Developers and investors should prioritize affordability and practicality over luxury, tailoring their offerings to meet the expectations of the emerging international student population.

Housing developments should be situated close to campus to ensure convenience and accessibility, factors consistently emphasized by students.

Security must remain a top priority, with robust measures such as secure entry systems and 24/7 surveillance providing peace of mind for both students and their families.

In addition, housing designs must strike a balance between privacy and opportunities for social interaction. Communal spaces, such as shared kitchens, lounges and study areas, are essential for fostering a sense of community and encouraging interpersonal connections. At the same time, private spaces, including study pods and quiet zones, are equally important to support students' needs for focus and personal recharge.

Operational strategies also have a role to play in enhancing the student housing experience. Structured social programs can create opportunities for residents to connect, fostering a sense of belonging and well-being. Activities such as cultural events, fitness classes and cooking workshops can encourage interaction and build community ties. Appointing student ambassadors to act as mentors and organizers further enhances this dynamic, while their active presence on social media can help promote the housing community to a wider audience.

By responding to these evolving preferences, student housing providers can create environments that not only meet the functional needs of international students but also enrich their overall living experience. These considerations are essential to maintaining competitiveness in a rapidly changing market.

Acknowledgments

This study is dedicated to the memory of Fred Pierce, founder and CEO of Pierce Education Properties. Fred helped to establish and pioneer the NMHC Student Housing Research Fund that made possible this and other studies. His warm spirit and generosity were greatly appreciated and are sorely missed.

The initiative would not have been possible without the support of a broad range of stakeholders. We wish to acknowledge and express our gratitude to the representatives from the following U.S. institutions and organizations who contributed by sharing their insights during interviews:

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Introduction

The Critical Role of Student Housing in International Education

The availability of student housing has become a pivotal factor influencing students' decision-making when selecting higher education destinations. A shortage of suitable housing options can undermine systematic and sustainable growth in destinations competing to attract international students and skilled talent. In several cases, inadequate student housing has led to restrictive measures, such as enrollment caps or even policies limiting the intake of international students.

To address these challenges, the systematic development of student housing that aligns with the preferences of international students is essential for fostering a robust and sustainable international education infrastructure.

NMHC's Initiative: Understanding Student Housing Needs

Recognizing this imperative, the National Multifamily Housing Council (NMHC) Student Housing Research Fund commissioned this study to evaluate the current and future impacts of international students on U.S. campuses and to explore the implications for purpose-built student housing.

The research aimed to analyze the student housing landscape for international students, focusing on their preferences, challenges and specific requirements across U.S. public universities.

As part of this initiative, the Douglas M. Bibby NMHC Research Foundation engaged BONARD, an independent market research consultancy specializing in international education and student housing, to conduct an in-depth study. BONARD's expertise enabled a robust evaluation of the U.S. as a study destination, including the footprint of international students, projected demand and actionable insights for stakeholders.

Scope and Objectives of the Study

This report consolidates findings from leading public universities, as well as feedback from international undergraduate and graduate students in the U.S. It identifies prevailing housing preferences among international students, contextualized within global mobility trends, and assesses strategies to enhance the U.S.'s appeal as a study destination.

The research aims to guide housing investors, developers and operators by offering a nuanced understanding of the evolving needs of international students. Through a combination of methods – desktop research, stakeholder interviews and direct feedback—the study delivers actionable recommendations on the supply, amenities and design of future student housing developments.

Global Context and Strategic Insights

Drawing on case studies from other mature and emerging student housing markets such as Europe, Canada and Australia, the report outlines best practices and relevant benchmarks for U.S. stakeholders. These insights provide a roadmap for aligning housing strategies with the expectations of international students while addressing broader challenges in the sector.

By offering a holistic analysis, the report seeks to empower stakeholders to make informed decisions that will not only accommodate international students effectively but also enhance the U.S.'s competitiveness in the global education landscape.

Methodology

This research employed a comprehensive mixed-methods approach, integrating desktop research, interviews and focus groups to ensure a robust analysis of the international student housing landscape.

Desktop Research

The initial phase collated existing data related to the housing and international student sectors. Sources included data from government agencies, research from international education associations and organizations, and reports on trends in international student mobility and housing.

The research primarily analyzed demand among undergraduate and graduate international students. Unless otherwise specified, students enrolled in non-award programs and Optional Practical Training (OPT) participants were excluded from the scope.

Enrollment forecasts utilized in this report were derived using the triple exponential smoothing method, a predictive modeling technique. To enhance accuracy, BONARD incorporated anticipated scenarios and accounted for market dynamics, including potential impacts of visa policy changes in other study destinations.

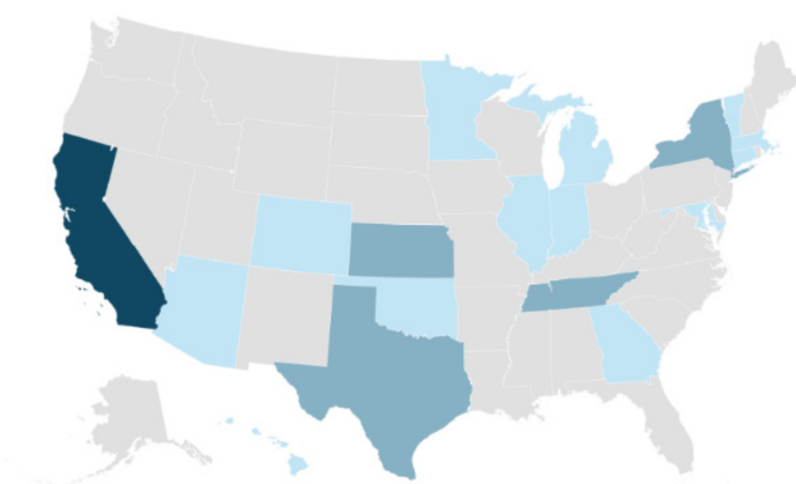
The analysis also incorporated global case studies, which provided comparative insights on housing amenities and contract lengths in other regions, enriching the report with perspectives on global trends and regional best practices.

Interviews with University Representatives

To gather institutional perspectives, BONARD identified the top 175 U.S. campuses with significant demand for purpose-built student housing. Representatives from all identified institutions were invited to participate in the study.

BONARD conducted 25 in-depth interviews—both in-person and online—across 18 U.S. states. Participants included housing officials and staff from international student offices. Using a semi-structured interview format, researchers combined standardized questions with open-ended prompts, allowing participants to elaborate on their institution's international student recruitment strategies and housing-related experiences.

U.S. States Represented in Interviews



Methodology *cont'd*

Interviews with International Students

To capture student perspectives, BONARD conducted 70 one-on-one interviews with international students, including both undergraduate and graduate participants. This approach ensured a nuanced understanding of varying needs and experiences based on academic level.

Focus Groups with International Students

Focus groups were convened to facilitate in-depth discussions with international students about their housing preferences, expectations and challenges. Key topics included preferred amenities, location preferences (on-campus versus off-campus) and factors influencing housing choices. These discussions offered valuable qualitative insights into the specific requirements of international students, complementing the quantitative data gathered in other phases.

Through this methodology, the research delivers a detailed understanding of the current and future landscape of international student housing at public universities in the U.S.

International Students in the U.S.

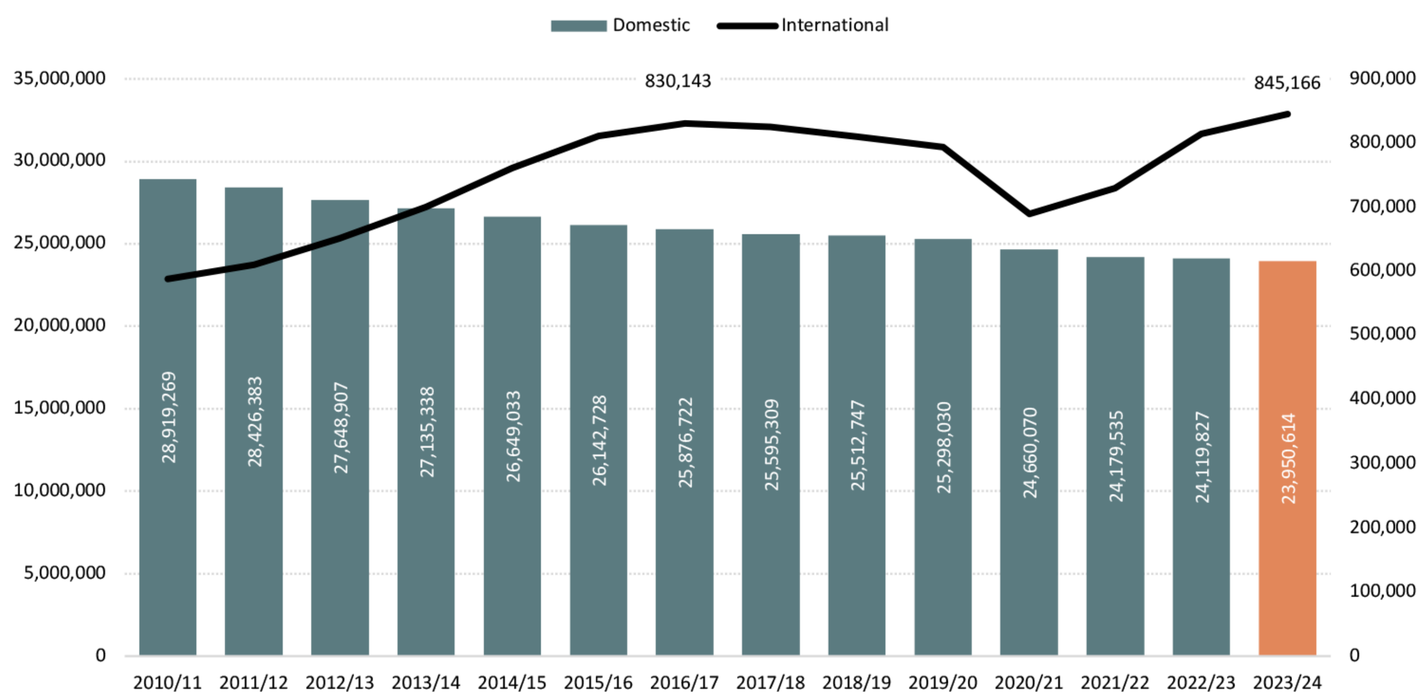
The U.S. boasts one of the largest post-secondary education systems in the world. While the vast majority of post-secondary students in the U.S. are domestic, this figure has been steadily declining due to demographic trends.

Between 2010/11 and 2022/23, the domestic student population dropped by 4.8 million, with projections suggesting an additional 15% decrease by 2035.

The U.S. hosted a record 1,126,690 international students in 2023/24, cementing its status as the world's leading study destination. Of these, 845,166 were enrolled in undergraduate and graduate programs, 38,742 were non-degree students (e.g., Intensive English learners) and 242,782 participated in Optional Practical Training (OPT).

FIGURE 1:

Domestic and International Post-Secondary Student Enrollment in the U.S.



Source: U.S. Department of Education, National Center for Education Statistics & Institute of International Education. (2023). Open Doors Report on International Educational Exchange. Retrieved from http://www.opendoorsdata.org.

Note: 2023/24 domestic enrollment is a forecast.

International student enrollment in the U.S. experienced steady growth until the 2016/17 academic year, after which it began to decline. This downward trend was largely attributed to increasing global competition and a growing perception among prospective students and their families that the U.S. was becoming a less "international-student-friendly" destination.

During this period, other countries intensified their efforts to attract international students through strategic policies and coordinated initiatives, recognizing the economic, cultural and academic benefits of hosting them. At the same time, the range of study destinations expanded, driven by the proliferation of transnational education (TNE) delivery models and increased intra-regional student mobility.

However, the U.S. began to recover in 2021/22, with international student enrollment rebounding strongly. By the 2023/24 academic year, the number of international students reached a new all-time high.

Leading Nations of Origin

In 2023/24, India overtook China as the leading country of origin for international students in the U.S. Indian student enrollment surged by 18% year-on-year, achieving a 5-year compound annual growth rate (CAGR) of 16%. In contrast, China experienced a 7% year-on-year decline, with a 5Y CAGR of -6%.

Growth has been recently fueled by markets in the Indian subcontinent and Africa. Ghana enjoyed a 19% 5Y CAGR, driven by a rising middle class and U.S. universities actively recruiting in Africa as part of diversification efforts. Bangladesh experienced a 15% 5Y CAGR, reflecting strong demand for higher education abroad and increasing opportunities in specialized fields. Nigeria, with an 8% 5Y CAGR, also confirmed the growing interest from African nations in pursuing U.S. education.

TABLE 1:

Principal Nations of Origin (International Undergraduate and Graduate Students)

Rank	Place of Origin	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	5Y CAGR
1	India	73,735	101,576	121,152	126,876	118,997	115,146	110,192	92,603	129,569	197,890	232,620	+16%
2	China	226,277	244,883	258,879	271,171	279,436	282,276	285,256	244,475	232,674	226,377	210,329	-6%
3	South Korea	55,886	52,256	49,308	46,551	43,210	40,679	38,634	31,981	33,177	34,611	32,690	-3%
4	Canada	25,123	23,736	23,443	23,304	22,098	21,941	21,897	21,480	23,342	23,720	24,154	+2%
5	Vietnam	14,448	15,380	17,621	18,769	20,636	20,762	20,237	18,657	17,543	18,063	17,862	-2%
6	Nigeria	6,809	8,109	9,227	10,037	10,649	10,963	10,946	10,177	11,741	14,359	16,420	+8%
7	Taiwan	16,063	15,676	15,522	15,494	16,239	16,610	16,700	14,171	15,101	15,844	15,565	-1%
8	Bangladesh	4,179	4,755	5,628	6,135	6,415	6,988	7,431	7,251	9,111	11,699	14,807	+15%
9	Nepal	6,409	6,641	8,219	10,247	11,915	11,508	10,384	8,982	9,094	11,830	13,343	+5%
10	Brazil	8,215	10,984	11,298	10,287	11,567	12,500	13,183	11,432	12,097	12,768	13,244	0%
11	Mexico	12,493	12,204	13,809	13,502	12,641	12,309	11,810	11,091	12,150	11,820	12,599	+1%
12	Saudi Arabia	37,973	43,445	47,162	44,806	38,668	31,196	25,201	19,048	15,366	13,653	12,383	-13%
13	Iran	8,876	9,710	10,376	10,549	10,503	9,743	9,130	7,719	7,425	8,849	10,646	+3%
14	Japan	12,717	12,167	12,410	12,062	12,108	11,876	11,458	9,921	10,298	10,707	9,341	-4%
15	Pakistan	4,048	4,404	5,126	5,822	6,184	6,266	6,226	5,902	6,876	8,132	8,596	+7%
16	Ghana	2,526	2,661	2,520	2,574	2,645	2,981	3,437	3,373	4,062	5,443	8,115	+19%
17	U.K.	7,488	7,844	8,361	8,506	8,305	8,090	7,871	6,600	7,664	7,635	7,689	0%
18	Colombia	5,547	5,745	6,182	6,278	6,148	6,138	5,908	5,507	6,341	7,019	7,548	+5%
19	Türkiye	8,899	8,599	8,518	8,297	8,234	7,849	7,282	6,527	6,803	6,786	7,207	0%
20	Indonesia	6,948	7,136	7,437	7,163	6,872	6,441	6,506	6,027	6,338	6,624	6,267	-1%

Source: Institute of International Education. (2024). Open Doors Report on International Educational Exchange. Retrieved from http://www.opendoorsdata.org.

The data highlighted the expanding role of emerging markets in shaping the international student population in the U.S. In contrast, traditional markets such as Japan and South Korea are experiencing long-term declines, with little prospect of recovery to previous levels.

China was still the leading country of origin for undergraduate international students in the U.S. in 2023/24, sending a total of 87,551 students. Even though year-on-year the number of Chinese undergraduates dropped by 13%, Chinese students still represented 26% of all undergraduate students in 2023/24.

India emerged as the leading source country for graduate programs in 2023/24, with 196,567 students. With a 5Y CAGR of 18%, this upward trajectory reflects a demand for advanced education, particularly in STEM fields, fueled by India's expanding middle class and focus on global career opportunities.

Enrollment Trends by Study Level and Institution Type

Over the past decade, the profile of international students in the U.S. has undergone notable shifts, with trends among undergraduate and graduate students diverging—a pattern best illustrated by new-entrant statistics.

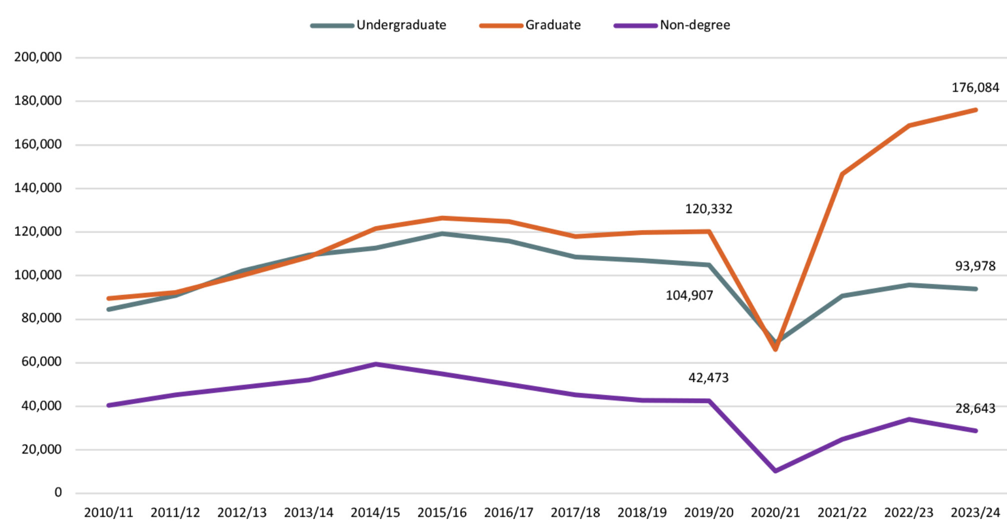
New international undergraduate enrollment reached its peak during the 2015/16 academic year but has since experienced a gradual decline. While there has been some recovery following the pandemic, the most recent data indicate a year-on-year decrease of 2%.

Conversely, the growth in new international enrollment has been predominantly driven by graduate students. Graduate enrollment has shown a robust V-shaped recovery in the wake of the pandemic, highlighting a contrasting trend.

Meanwhile, the number of students in non-degree programs has been on a steady decline since the 2014/15 academic year.

FIGURE 2:

Number of New International Students (New Entrants) to the U.S. Higher Education by Level of Study



Source: Institute of International Education. (2024). Open Doors Report on International Educational Exchange. Retrieved from http://www.opendoorsdata.org.

Between 2014/15 and 2022/23, undergraduate international student enrollment across U.S. institutions displayed varied trends across public, private non-profit and private for-profit sectors. Public institutions continue to attract the majority of international students, accounting for 60% of total enrollment, largely due to their diverse program offerings and relative affordability. At the same time, international enrollment at private non-profit institutions has been steadily rising, reflecting shifting preferences among students.

Public institutions saw a peak in enrollment during the 2016/17 academic year, with 304,679 international students. However, numbers have since declined consistently, reaching 221,075 in 2022/23.

Private non-profit institutions, on the other hand, demonstrated greater stability over the same period, with enrollment showing minor fluctuations before rising modestly to 124,442 in 2022/23. These institutions are becoming increasingly attractive to international students, thanks to factors such as strong academic reputations, enhanced recruitment efforts and financial aid options. Their competitive pricing – often on par with public universities, which typically impose additional fees on international students and offer limited scholarships – further adds to their appeal. Additionally, many private non-profits simplify application processes with more flexible criteria for English proficiency and academic grades. In contrast, private for-profit institutions experienced a sharp decline in international enrollment, plummeting from 6,780 in 2014/15 to just 2,086 in 2022/23.

Unlike their non-profit counterparts, for-profit institutions tend to specialize in niche academic fields such as law, nursing and the arts, which inherently limits their appeal to a broader international student population.

FIGURE 3:
The Number of International Students by Institution Type in the U.S.

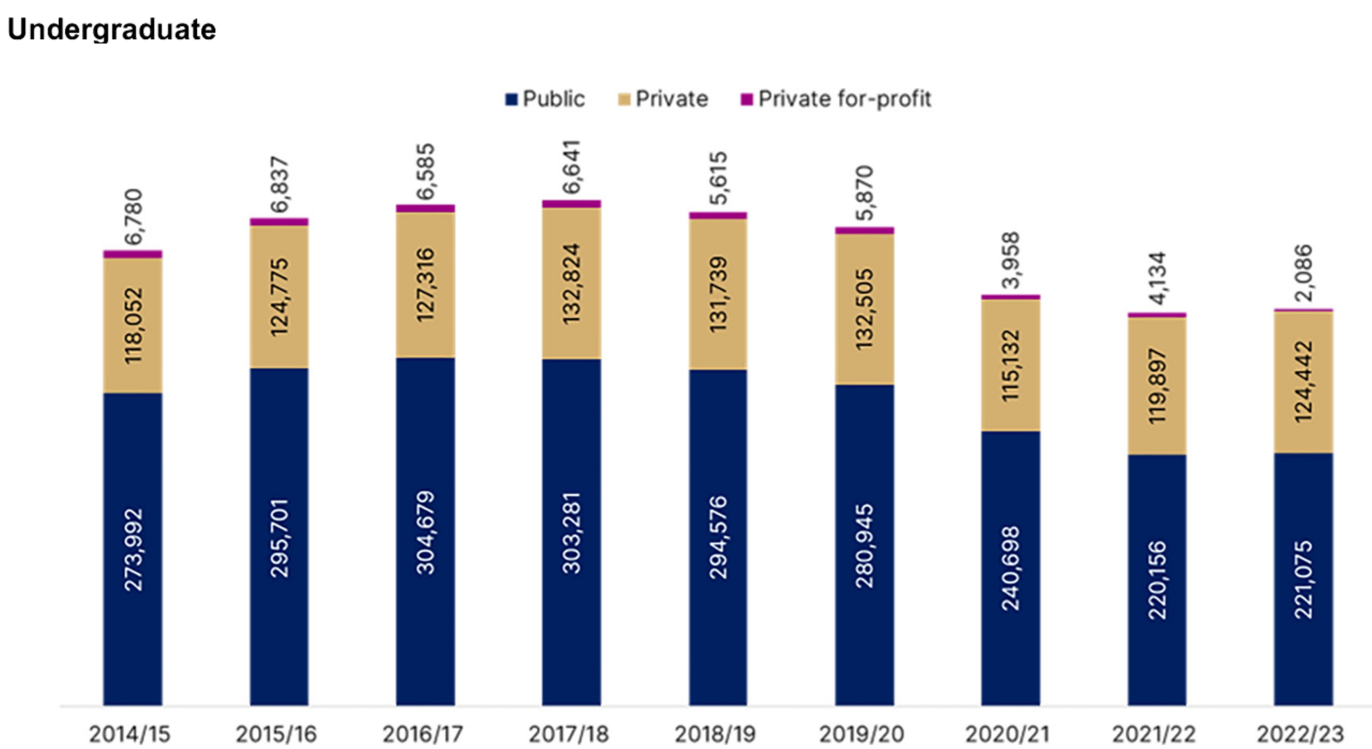
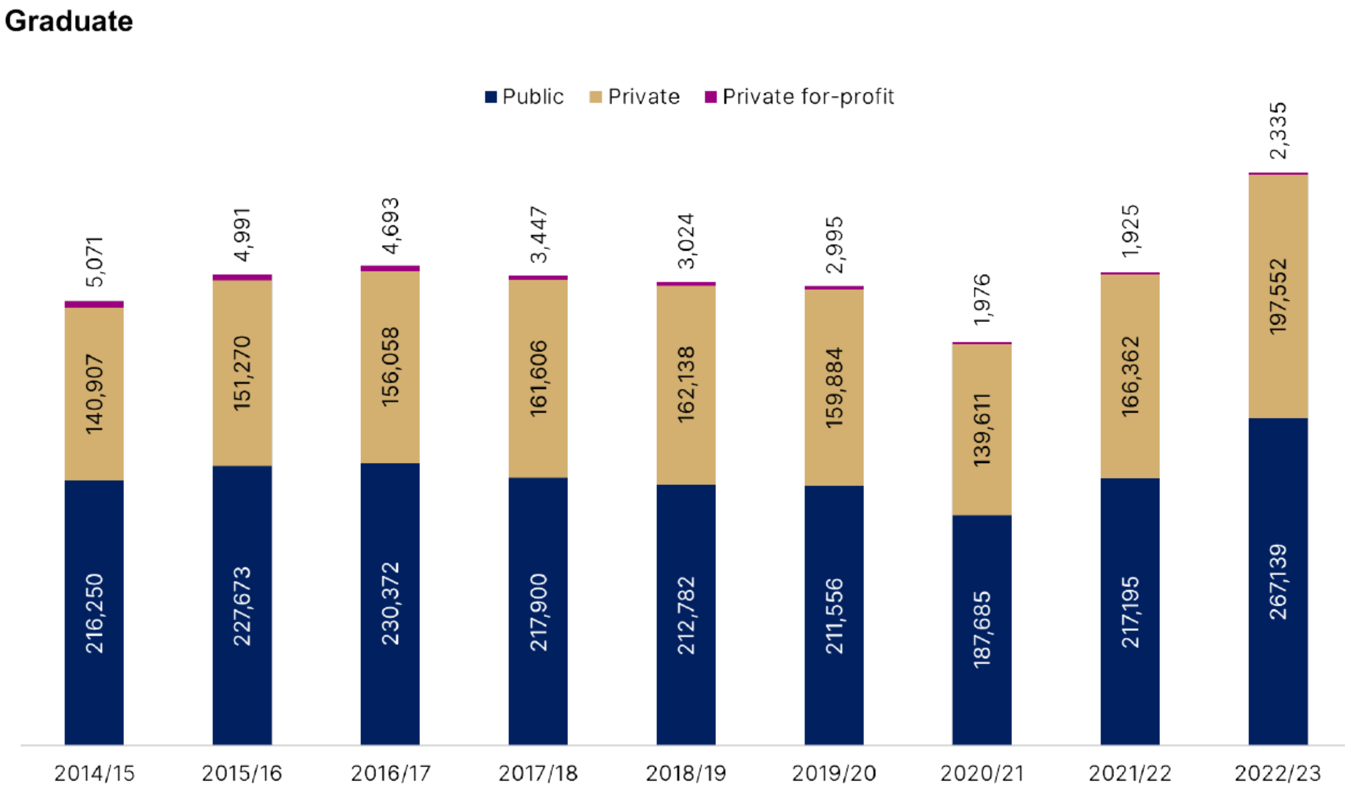


FIGURE 3 *cont'd*:
The Number of International Students by Institution Type in the U.S.



Source: Institute of International Education. (2023). Open Doors Report on International Educational Exchange. Retrieved from http://www.opendoorsdata.org.

Note: Based on the latest data available at the time of publishing the report.

Overview of the Top 175 Public University Campuses

The research further examined the largest 175 U.S. public university campuses ranked by total international student enrollment. In 2022, these campuses collectively hosted 419,980 international students, accounting for 8.7% of total enrollments—nearly 6 percentage points higher than the national average.

Enrollment trends at public institutions reveal a notable dichotomy: larger universities are experiencing growth, while smaller campuses face increasing challenges. Larger institutions benefit from robust resources, diverse academic offerings and strong appeal to both domestic and international students, enabling them to thrive in a competitive environment.

For public institutions, domestic enrollment pressures are less immediate. These universities are relatively insulated from the declining local student population due to their established reputations, more stable funding and strategic location advantages.

In contrast, smaller campuses are grappling with enrollment declines, often linked to geographic limitations, specialized academic programs and a heavier reliance on local student pools. This dynamic may indicate a potential consolidation trend in U.S. higher education, where smaller institutions may streamline their programs to remain viable.

It is important to note that similar market dynamics are shaping the higher education landscapes in other established study destinations, including the U.K., Australia and Canada.

TABLE 2:
Overview of the Largest 20 Public University Campuses in the U.S. by the Number of International Students

Institution - Campus name	International students: Undergraduate	International students: Graduate	International students: Total	Domestic students: Total	Total student population	Share of international students
University of Illinois Urbana-Champaign	5,343	7,448	12,791	44,125	56,916	22%
Georgia Institute of Technology-Main Campus	1,870	10,525	12,395	32,901	45,296	27%
Arizona State University, Campus Immersion	4,429	7,179	11,608	68,457	80,065	14%
Purdue University-Main Campus	4,249	5,191	9,440	42,088	51,528	18%
University of Michigan-Ann Arbor	2,866	6,014	8,880	42,345	51,225	17%
University of California-San Diego	4,607	3,979	8,586	33,420	42,006	20%
University of Washington-Seattle Campus	4,466	3,733	8,199	44,120	52,319	16%
University of California-Berkeley	4,163	3,997	8,160	37,147	45,307	18%
Pennsylvania State University-Main Campus	4,599	3,304	7,903	42,125	50,028	16%
University of Wisconsin-Madison	3,861	3,470	7,331	41,625	48,956	15%
University of North Texas	1,452	5,653	7,105	37,662	44,767	16%
The University of Texas-Dallas	897	6,032	6,929	24,641	31,570	22%
University of California-Los Angeles	2,853	3,717	6,570	39,860	46,430	14%
University at Buffalo	2,624	3,871	6,495	25,604	32,099	20%
University of California-Davis	4,216	1,919	6,135	33,544	39,679	15%
University of California-Irvine	3,747	2,358	6,105	29,832	35,937	17%
The University of Texas-Arlington	1,116	4,979	6,095	37,851	43,946	14%
Ohio State University-Main Campus	3,200	2,603	5,803	54,737	60,540	10%
University of South Florida	3,248	2,489	5,737	43,863	49,600	12%
Texas A & M University-College Station	689	4,757	5,446	68,568	74,014	7%

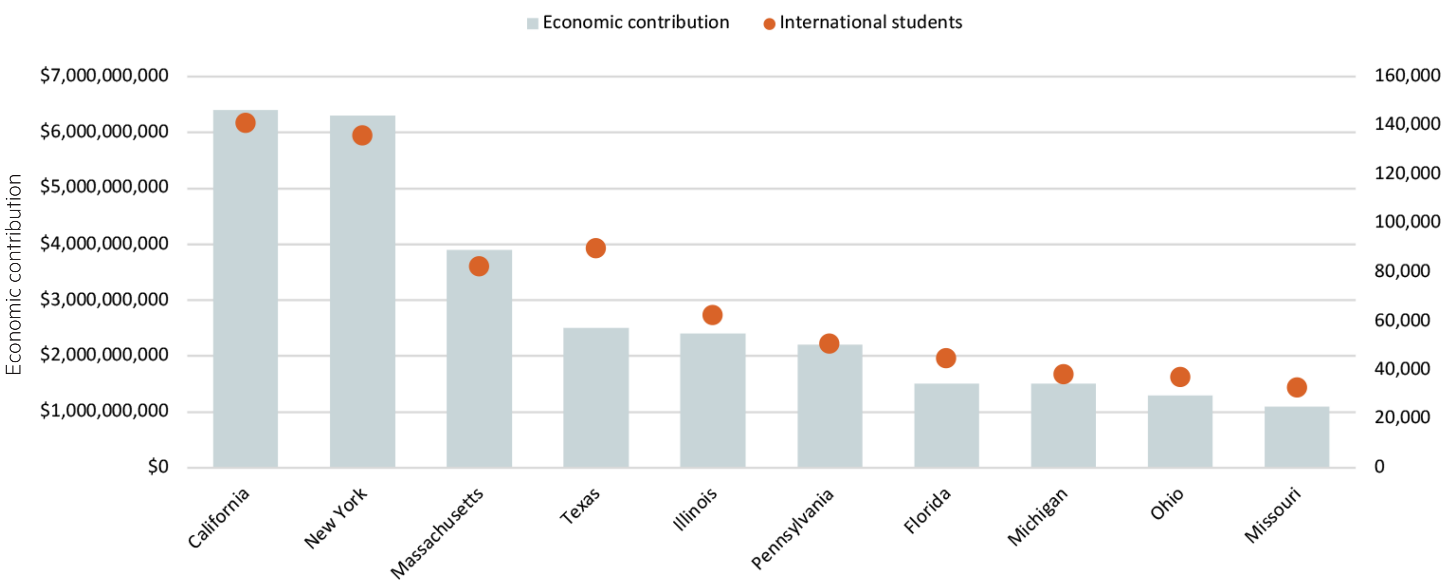
Source: U.S. Department of Education, National Center for Education Statistics, 2023; a complete list of the 175 largest campuses in the U.S. can be found in the Appendix.

Economic Impact of International Students

According to NAFSA's International Student Economic Value Tool, international students generated approximately $43.8 billion for the U.S. economy during the 2023/24 academic year. Their impact extends beyond tuition fees, encompassing living expenses and support for local businesses, which collectively drive significant economic activity.

This contribution supported 378,175 jobs across the U.S.—highlighting the vital role international students play in bolstering the nation's economy.

FIGURE 4:
Top 10 U.S. States with the Highest Economic Contribution from International Students in 2023/24



Source: Institute of International Education, 2024; NAFSA, 2024

California, New York, Massachusetts, Texas and Illinois benefited the most from the economic contributions of international students. In 2023/24, California hosted 140,858 students who contributed $6.4 billion in economic value. New York followed, hosting 135,813 students and generating $6.3 billion.

While Texas had 89,546 international students—7,150 more than Massachusetts—Massachusetts generated $1.4 billion more in economic value. This disparity is attributed to Massachusetts' higher tuition fees and fewer financial incentives, whereas Texas offers lower fees and is generally more affordable for students.

CHAPTER 2

The U.S. in the Global Context

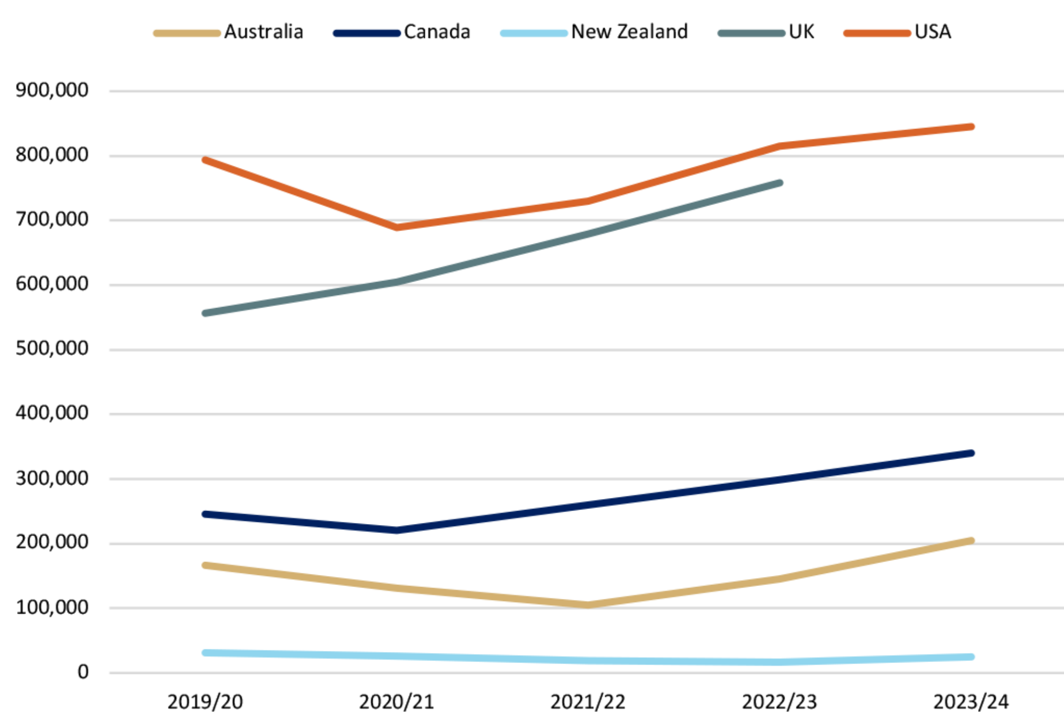
The U.S. has traditionally been the most popular destination for international students. The institutions' reputations for high-quality education, together with opportunities for research and innovation, have attracted millions of students from across the globe, especially in STEM-related fields.

According to the UNESCO Institute for Statistics, there were 6.9 million internationally mobile degree-seeking students distributed across the world in 2022.[1] However, as the global market continued to expand, the U.S. has been losing its market share, especially since 2016. This period coincides with the administration's introduction of restrictive immigration policies and heightened visa scrutiny.

Other countries, particularly the U.K., have been narrowing the gap. Australia and Canada have capitalized on this opportunity, strengthening their global presence and increasing their market share. Their growth has been fueled by more favorable immigration policies, streamlined visa processes and expanded post-graduation work opportunities. For example, Australia has experienced a steady rise in international student numbers, while Canada has successfully doubled its international student population since 2016.

FIGURE 5:

Number of International Undergraduate and Graduate Students — U.S. vs. Selected Competitors



Source: Institute of International Education. (2024). Open Doors Report on International Educational Exchange. Retrieved from http://www.opendoorsdata.org., HESA, Australian Government, Department of Education, IRCC, 2024

[1] https://www.iie.org/research-initiatives/project-atlas

Nevertheless, after experiencing a strong rebound and reaching record-high enrollment numbers, Australia and Canada have proposed policies, such as international student caps, to manage the increasing demand and ensure the integrity of their education sectors.

In Q3 2024, visa approvals at all study levels in Australia dropped by 19% compared to Q3 2023. Due to the restrictions and doubled visa fees, 4,500 people are expected to lose their jobs in the education sector and adjacent sectors.[2] In Canada, study permit issuance slumped by 74% over the same period.

Meanwhile, the U.K. has implemented its own policy changes (e.g., international students are no longer able to bring dependents with them on their student visas, except for those on research postgraduate programs), which have effectively reduced the flow of students from key markets like India and Nigeria, shrinking its international student pool. The latest data from the U.K. Home Office showed that student visa grants dropped by 13% in Q3 2024 compared to Q3 2023.

Perception of the U.S. as a Study Destination

Global student mobility is shaped by several factors, primarily government immigration policies, access to post-study work rights, perceived friendliness, safety and, increasingly, affordability. With recent changes in international student policies in Australia, Canada and the U.K., U.S. higher education may benefit if it adjusts to these policy dynamics.

Key Strengths:

- **Perception of high-quality higher education:** U.S. institutions rank among the top in global rankings, which enhances their reputation.
- **Employment opportunities after graduation:** Students view a U.S. higher education degree as a pathway to gaining practical experience, through programs like OPT, and launching successful global careers.
- **Scholarships:** Generous financial aid options, including need-based, merit-based and program-specific scholarships attract a diverse group of international students.
- **Diverse program offerings:** U.S. institutions provide a wide range of programs, including flexible options such as hybrid and online learning. This may appeal to a broad group of international students with different preferences.
- **Postgraduate STEM reputation:** The U.S. is renowned for its strong STEM programs, particularly at the postgraduate level. STEM programs attract students with the added advantage of high employability and research opportunities.

[2] https://universitiesaustralia.edu.au/media-item/keynote-address-itec24-higher-education-symposium

Key Weaknesses:

- **Perception of the visa application process:** International students are concerned about visa denials. They view the U.S. as a destination that is increasingly restrictive in terms of its immigration policy. At the same time, while the visa application process in the U.S. is sometimes perceived as challenging, visa policies in other countries have become even more restrictive for certain nationalities.
- **Political environment:** Past anti-immigrant rhetoric and policies have created a sense of unease among international students. This political climate can discourage students from choosing the U.S. as a study destination.
- **Cost of studying and living in the U.S.:** While U.S. higher education is often perceived as worth the investment due to its quality, the high cost remains a significant barrier for many students.
- **Safety concerns:** Issues related to gun violence and campus safety in the U.S. represent concerns for international students and their families.

FIGURE 6:
Factors Affecting First-Choice Study Destination Choice

Total	US	Australia	UK	Canada	New Zealand
High quality of education	High quality of education	High quality of education	High quality of education	High quality of education	Safe country for international students
Good employment opportunities after graduation	Good employment opportunities after graduation	Safe country for international students	Good employment opportunities after graduation	Safe country for international students	High quality of education
Safe country for international students	Availability of scholarships	Good employment opportunities after graduation	Availability of scholarships	Good employment opportunities after graduation	Good employment opportunities after graduation
Availability of scholarships	Institutions are attractive	Part-time work opportunities are good	Institutions are attractive	Ease of obtaining permanent residency	Welcomes people from other countries
Part-time work opportunities are good	Good internship opportunities	Availability of scholarships	Part-time work opportunities are good	Supports international students	Supports international students
Supports international students	Supports international students	Supports international students	Safe country for international students	Welcomes people from other countries	Availability of scholarships

Source: IDP, Emerging Futures 5 (2024)

Underlying Factors Students Consider When Making Study Destination Choices

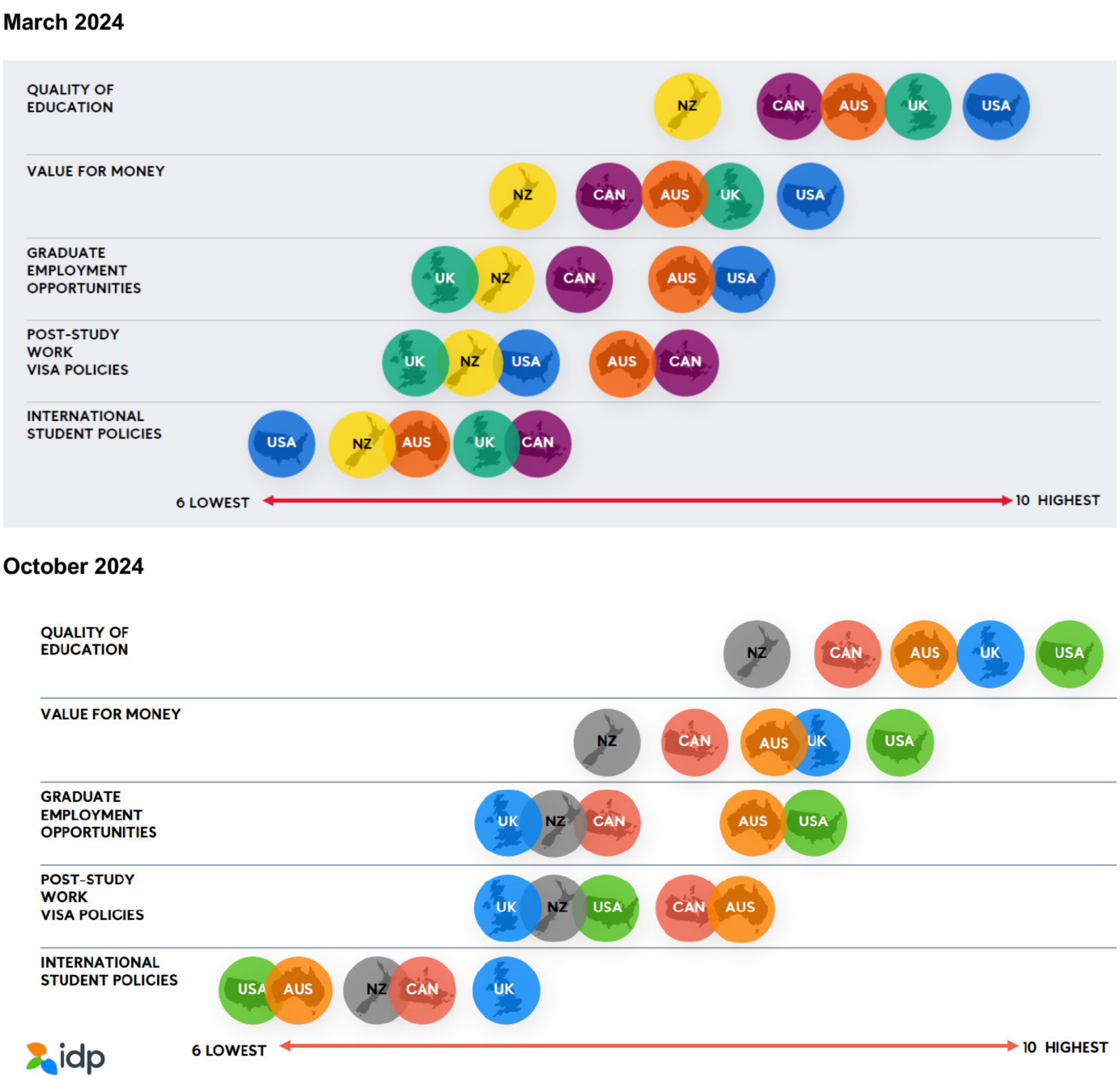
Students typically consider a range of factors that influence their decision-making including access to work rights, safety and access to housing. The Emerging Futures study by IDP conducted in March 2024 revealed that the highest percentage of responding students (24%) marked the U.S. as their first choice of study for the first time. Students ranked high-quality education as the number one reason to choose a U.S. institution.

The reputation of U.S. institutions was attractive to prospective students together with academic programs and post-graduation work schemes. Students favorably viewed the good employment opportunities after graduation and the availability of scholarships. While the U.S. ranked high in these categories, it ranked low in international student policies, such as perceived safety for international students.

According to the study, more than half of the respondents monitored the policy changes across the English-speaking destinations and 41% reconsidered their choices based on the changes. These perceptions may positively affect U.S. international student enrollment because of policy changes in other countries. Additionally, the U.S. does not face a shortage of student housing unlike Canada and Australia, which may serve as one of the key messages to prospective international students.

FIGURE 7:

Student Perceptions of Top Destinations



Source: IDP, Emerging Futures 5 and 6 (2024)

Market Outlook

The number of higher education students studying abroad is predicted to increase from the current 6.9 million to 9 million students in 2030.[3] However, traditional mobility patterns are being increasingly disrupted by systematic changes in visa policy frameworks.

As a result, international education is entering a transformative era, characterized by moderated growth in traditional English-speaking destinations and heightened competition from emerging destinations predominantly in Europe and Asia, as well as expanded TNE offerings.

Student mobility is shifting toward countries with more immigration-friendly policies, as students seek to mitigate the risk of receiving a visa refusal. In this context, international students will be drawn not only to the high quality of U.S. institutions but also, as of this writing, to efforts by the U.S. State Department to streamline the visa application process. This includes issuing clearer guidelines to embassy officers, simplifying the visa application process and improving staffing capacity where suitable.

Emerging Destinations

Challenging policy environments and messaging in Australia, Canada and, to a degree, the U.K. have begun to reshape global mobility flows. Data from the first half of 2024 indicate significant declines in student visa issuance in these countries. This shift has facilitated growth in alternative destinations, particularly in Europe and Asia.

Europe's appeal in international education has surged, driven by accessible, affordable programs offered in English. In 2023/24, Germany hosted nearly 380,000 international students, including a record 49,483 students from India.[4] France saw a 4.6% year-on-year increase, bringing its international student count to 430,466,[5] while Spain reported a 10.7% increase, reaching 184,193 international students in 2022/23.[6]

Asia, too, is experiencing increased international mobility, with China, Singapore, South Korea, Malaysia and Japan heavily investing in their education systems to enhance their global appeal.

Asian markets demonstrated their ability to attract students from neighboring countries and beyond with China ranking ninth in the number of international students globally in 2022. Japan was successful in attracting students from Asian markets such as China, South Korea and Vietnam, while South Korea drew students primarily from China, Vietnam and Mongolia. International students in South Korea represented 7% of its total student population, compared to 4% in Japan in 2022.

[3] Navitas, 2024
[4] DAAD, 2024
[5] Campus France, 2024
[6] Ministry of Education, Spain, 2024

Transnational Education

TNE is playing an increasingly pivotal role in reshaping mobility patterns, particularly in China and Southeast Asia. Countries such as Malaysia, Singapore and Vietnam have become central to this trend by hosting branch campuses and joint programs with Western universities. These partnerships enable students to earn degrees from globally recognized institutions at a lower cost in a more accessible location. As TNE offerings expand and improve, many students are opting to remain within the region rather than studying further abroad.

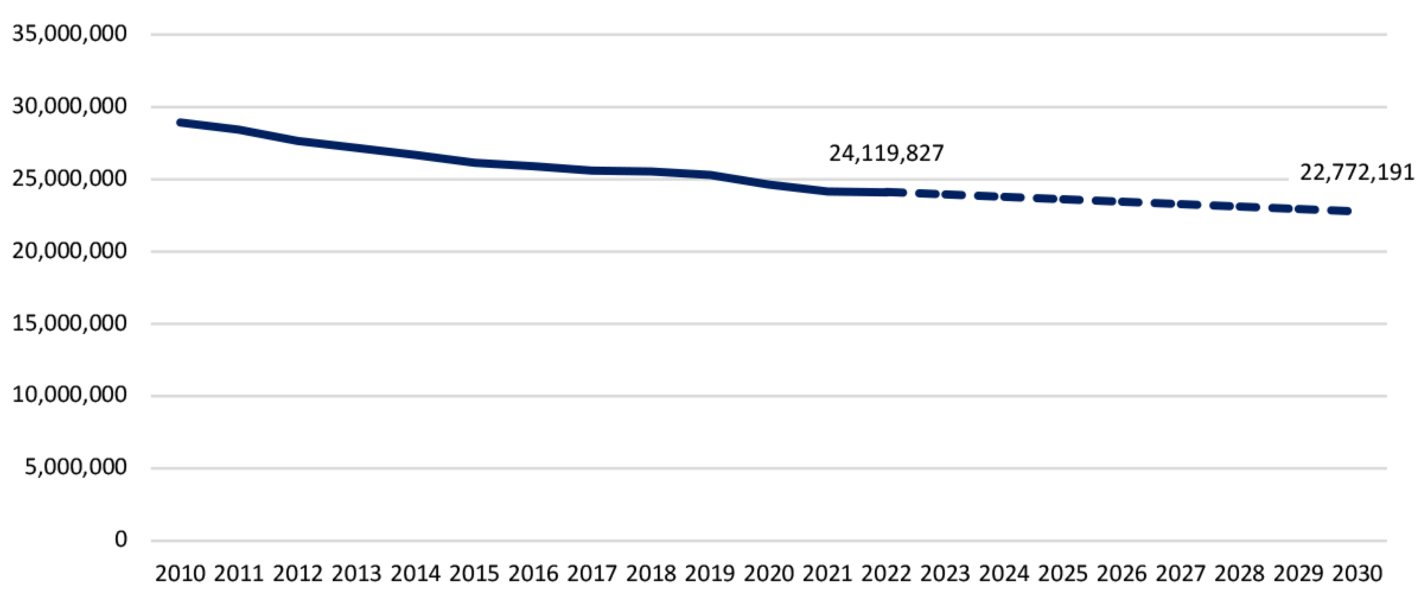
India is also witnessing significant TNE growth, with international universities establishing local campuses and programs. This trend may lead Indian students to choose domestic degree options over studying in traditional destinations such as the U.S., potentially impacting Indian enrollment on American campuses.

Similarly, the Middle East has emerged as another key region for TNE expansion. Universities from Europe, Australia and the U.K. have established branch campuses and partnerships in the region, attracting both local and international students from Asia, Africa and beyond. Dubai, in particular, has positioned itself as an attractive destination for international students by offering a combination of high-quality education, favorable visa policies and work rights. Moreover, Dubai offers a strategic location, safety and student housing options.

Market Outlook for the U.S.

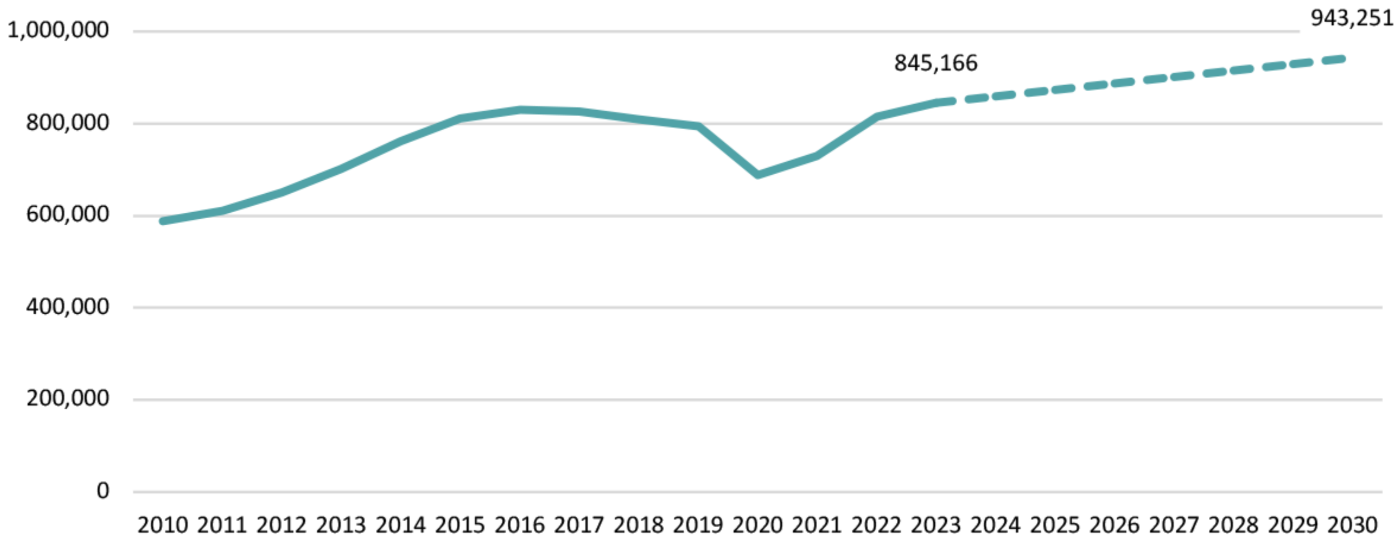
The U.S. higher education system is globally recognized for its excellence, attracting students from around the world. However, its ability to sustain this appeal hinges on effectively leveraging its strengths while addressing key challenges that impact its attractiveness to prospective international students.

FIGURE 8:
Forecast: Domestic Students at U.S. Higher Education Institutions



Source: BONARD, based on historical data from NCES and expected scenarios, 2024

FIGURE 9:
Forecast: International Students at U.S. Higher Education Institutions



Source: BONARD, based on historical data from IIE and expected scenarios, 2024

Anticipating the likely future student flow scenarios, the international student body in the U.S. is projected to grow at a modest annual rate of 1.6% through 2030, reaching 943,251 students by that year (undergraduate and graduate combined).

In the short term, however, the most recent student visa issuance data indicates a potential drop in Fall 2024 enrollment. While overall F-1 student visa issuance grew in Q1 2024 (+4% compared to Q1 2023), the number of visa grants declined by 7% and 21% in Q2 2024 and Q3 2024, respectively. According to U.S. institutions, this downturn is attributed to challenges in visa processing rather than a decline in demand. Stable and effective visa processing will therefore be one of the key determinants of the international student recruitment trajectory in the U.S.

Overall, the total student population is forecasted to decline from 29.5 million in 2010 to 23.1 million by 2030, aligning with the decreases in domestic enrollment and a relatively small share of international students. The higher education sector in the U.S. is shrinking, which could impact institutions reliant on tuition revenue. Universities can adapt by attracting international students via a more targeted approach and offering alternative educational models.

To increase the effectiveness of international student recruitment, U.S. institutions will need to implement more coordinated efforts across departments. As part of international student recruitment, U.S. institutions should establish specific budgets to support recruitment activities, including outreach events and digital marketing, and introduce scholarships to attract international students.

Additionally, partnering with reputable education agents in key international markets can expand the reach of prospective students. Relevant education agents can offer localized insights and professional, student-centered support, helping U.S. institutions connect with suitable students.

Forecast: Principal Nations of Origin

To more effectively evaluate the potential impact on future housing demand, BONARD developed a forecast of principal countries of origin for international students. The projection is based on a mathematical model utilizing the triple exponential smoothing method.

It is important to acknowledge that the forecasts presented below are subject to variability, influenced by both conditions within the U.S. (e.g., visa processing) and developments in the respective source countries. For example, while the model anticipates a continued and eventually pronounced decline in the number of Chinese and South Korean students, this trend could stabilize as a critical mass of students from China and South Korea may still choose the U.S. due to its enduring popularity as a study destination.

Conversely, certain markets in Asia may not achieve their full potential if affordable, high-quality local or TNE options develop rapidly. For instance, India's emergence as a TNE hub could significantly impact outbound student mobility and reshape regional dynamics.

FIGURE 10:

International Undergraduate and Graduate Student Forecast for the Top 10 Markets

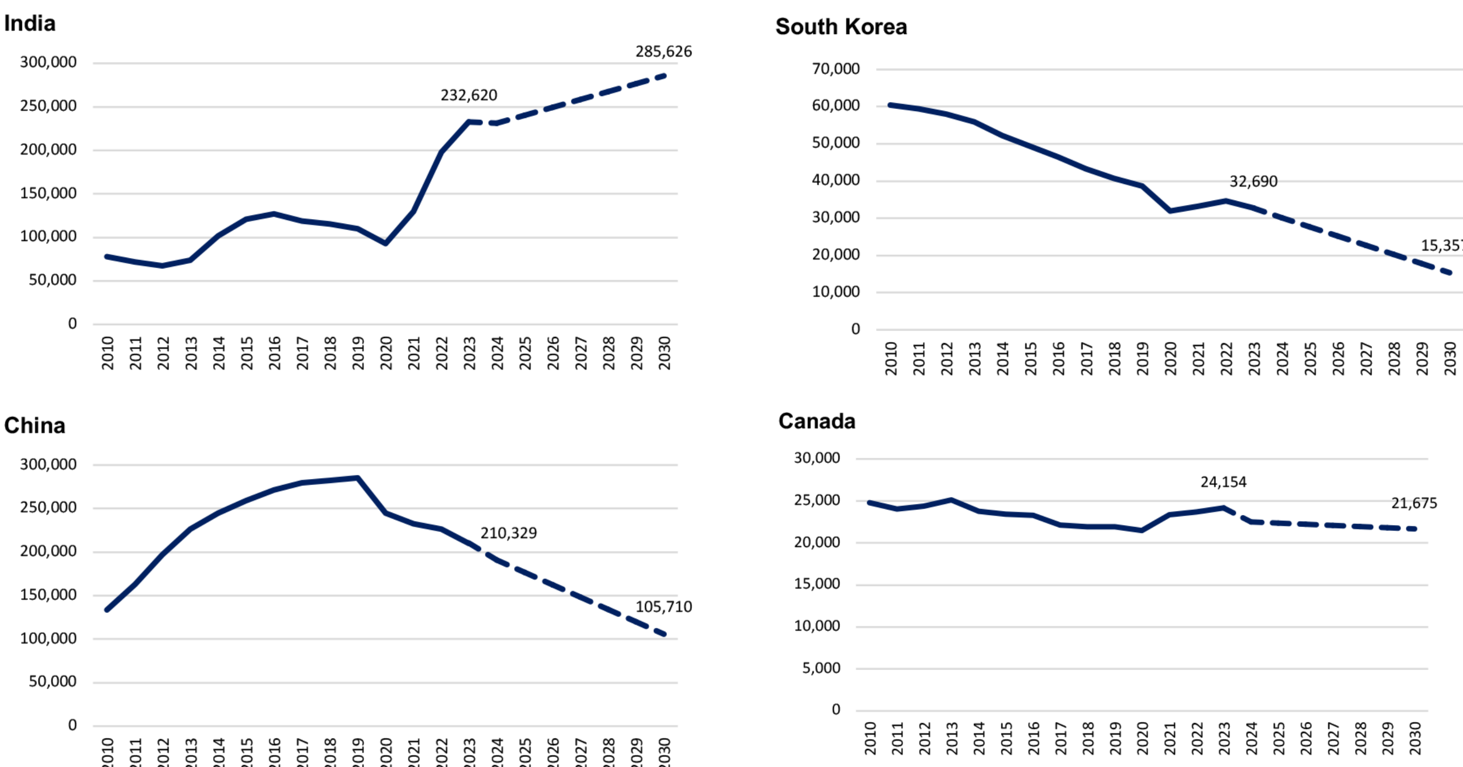
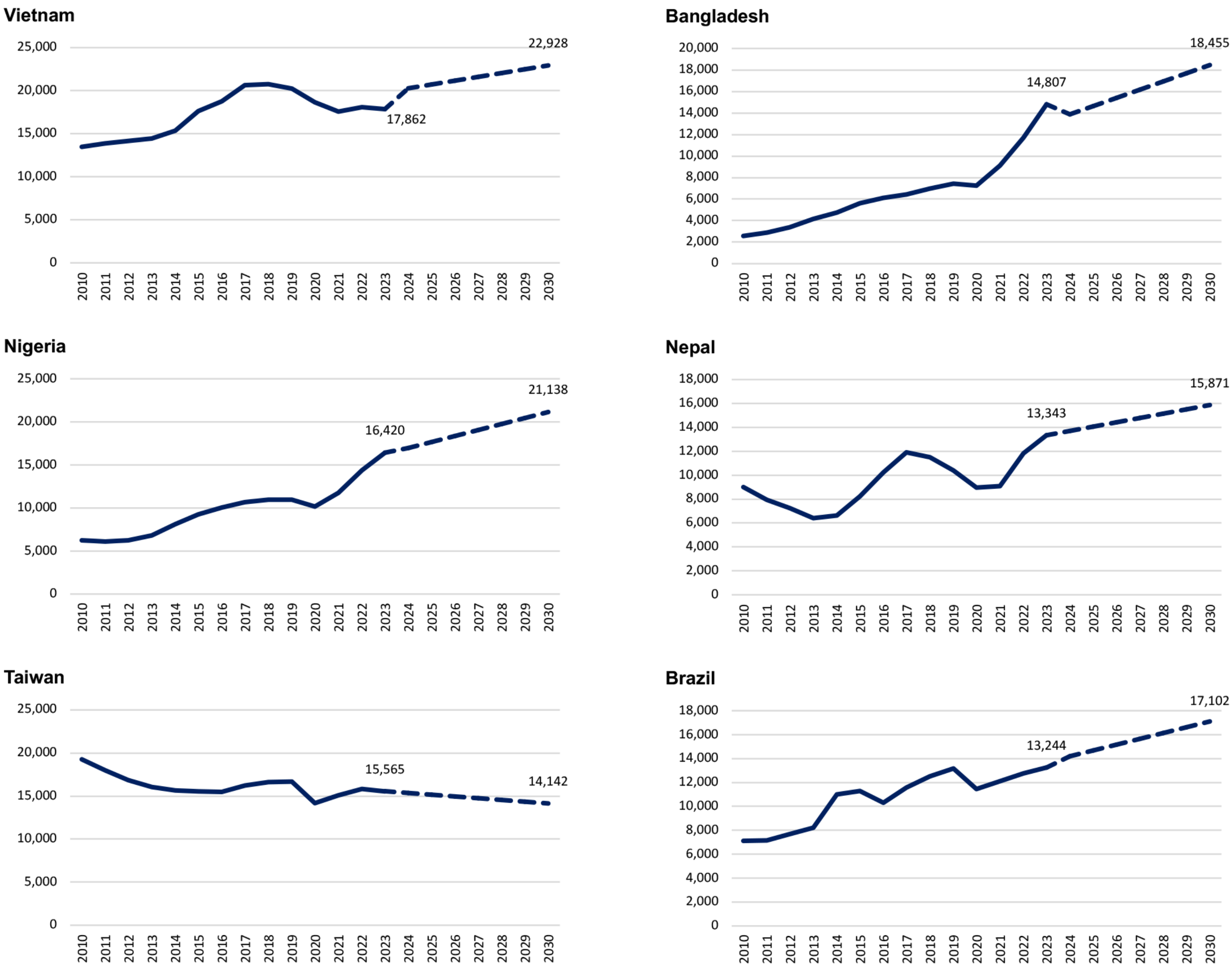


FIGURE 10 *cont'd*:
International Undergraduate and Graduate Student Forecast for the Top 10 Markets



Source: BONARD, based on historical data from IIE and expected scenarios, 2024

The forecasts shed light on how the source market structure is going to evolve for U.S. institutions. India is expected to offer the highest recruitment potential, both in terms of growth and volume. India's enrollment numbers are anticipated to grow from 77,628 in 2010 to 285,626 in 2030.

Similarly, Vietnam demonstrates an optimistic outlook, with enrollments predicted to grow from 13,474 in 2010 to over 22,900 by 2030. This growth is a result of a growing middle class driven by economic development. Nigeria and Brazil also display strong growth potential as key markets for international higher education.

Given the anticipated market development trajectory, recruitment teams will need to steer their focus toward countries exhibiting organic demand (for instance, India, Nigeria, Ghana, Bangladesh and Central Asia). They will do so to diversify their outreach and to offset the prospect of limited growth or declines in China, South Korea and Taiwan, where competition and student acquisition costs will be high.

Forecast: Outlook for the Top 175 Campuses

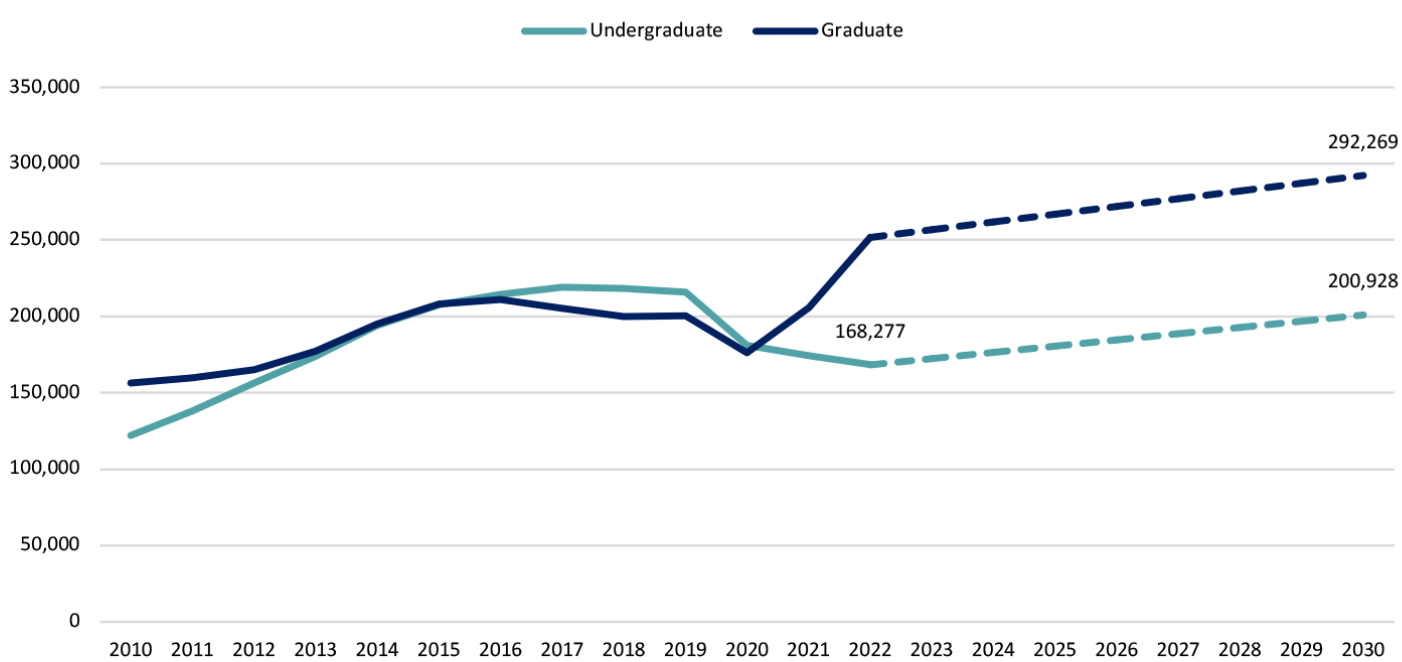
As the higher education sector faces an anticipated enrollment cliff driven by declining numbers of high school graduates in some regions, the top 175 campuses are positioned to defy these trends and experience growth in both domestic and international enrollments. These institutions are poised to thrive due to a combination of factors, from demographic trends to institutional strategies that cater to the evolving needs of students.

Many of the 175 campuses are located in areas experiencing population growth or high rates of educational attainment. Urban and suburban regions with stable or expanding numbers of high school graduates are essential to maintaining strong undergraduate enrollment figures.

These U.S. institutions have long-standing reputations for excellence in specific academic fields. This brand attracts both undergraduate and graduate students who are looking for reputable programs that can enhance their career prospects.

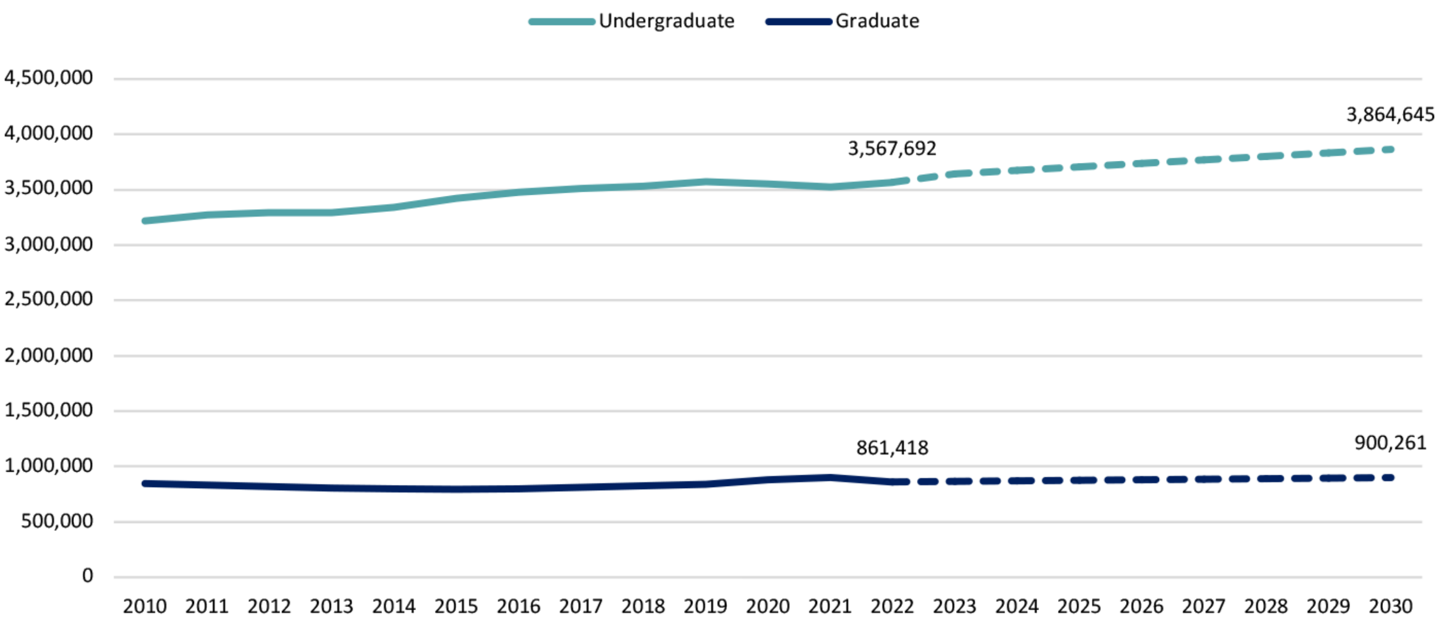
Cost remains a significant factor in the decision to pursue higher education. Public universities offer lower tuition and competitive financial aid packages, including scholarships, work-study opportunities and low-interest loans.

FIGURE 11:
Breakdown by Undergraduate and Graduate International Students at the Top 175 Public Universities



Source: BONARD, based on historical data from NCES and expected scenarios, 2024

FIGURE 12:
Breakdown by Undergraduate and Graduate Domestic Students at the Top 175 Public Universities



Source: BONARD, based on historical data from NCES and expected scenarios, 2024

From 3.21 million in 2010 to 3.86 million in 2030, the domestic undergraduate population at the top 175 public universities is projected to grow slowly. Domestic graduate student numbers are also expected to increase slightly, from 845,046 in 2010 to 900,261 by 2030. The slow growth rate is a result of shifts in demographics as well as the changing perception of higher education which is influencing the number of students entering higher education programs.

International undergraduate students are expected to increase from 122,071 in 2010 to 200,928 in 2030. Similarly, there is an anticipated growth in the number of international graduate students, starting at 156,384 in 2010 and rising to 292,269 by 2030. There is a growing global interest in studying in the U.S. due to the perceived quality of education and available post-graduation opportunities. Additionally, there is a strong demand for graduate degrees from international markets, driven by the quality of STEM degrees and research opportunities.

Mapping Student Preferences and Implications for Future Student Housing Design

BONARD conducted interviews with 25 U.S. public institutions across 18 states to gather insights on their perspectives regarding international student housing. The interviews uncovered housing preferences and priorities among undergraduate and graduate international students. The U.S. institutions highlighted the significance of affordability, privacy, cultural considerations and access to amenities in shaping student housing choices.

Furthermore, BONARD organized two focus groups with six undergraduate and six graduate students to better understand their preferences and needs in student housing. The focus groups captured students from eight countries studying in nine U.S. states.

Additionally, BONARD surveyed 70 international students in the U.S. from 16 countries studying across seven U.S. states. The top five nationalities represented in this sample were students from India, Vietnam, Japan, China and Singapore.

The housing arrangements of the international students in the sample varied across education levels. Among the undergraduate international students surveyed, 25% rented private apartments, indicating a preference for privacy and personal space. Shared apartments and off-campus dormitories were each chosen by 22% of students, reflecting a balance of affordability and social living. Nineteen percent lived in on-campus dormitories, while the remaining 11% opted for alternative arrangements, such as living with family members.

For graduate international students, 41% preferred shared apartments, likely due to affordability and opportunities for social interaction. Off-campus dormitories housed 25% of respondents, while 19% rented private apartments for additional space and privacy. Nine percent of graduate students lived in on-campus dormitories, and the remaining 6% resided in studio apartments, seeking a more private living arrangement.

University Recruitment and Housing Plans

International Student Recruitment

The approach to international recruitment varies widely across institutions, influenced by a blend of demographic realities, legislative mandates and financial considerations. Institutions with strong academic programs, budget flexibility or advantageous locations are generally better positioned to expand international recruitment. The institutions interviewed are generally in a good position not to be affected by the enrollment cliff (projected drop in college enrollments starting in 2025, largely due to declining birth rates in the U.S.) given their size, location and academic offers.

Some public universities reported record-breaking enrollment numbers, both domestic and international, for the 2023/24 academic year. In contrast, smaller universities located outside major cities faced challenges in maintaining their enrollment levels.

For institutions anticipating declining domestic enrollments due to the enrollment cliff, international recruitment is seen as a critical solution. Universities that actively prepare for this shift by offering tuition incentives or focusing on targeted recruitment regions are positioning themselves to offset shrinking domestic student numbers.

Nevertheless, all institutions were eager to recruit more international students as these students typically pay higher tuition than domestic students and boost diversity on campus.

Institutional Adjustments to Student Housing

While some universities are actively expanding housing to meet the needs of both domestic and international students, others focus on providing flexibility and guidance for off-campus housing. Where on-campus housing remains limited, institutions often encourage students to find private housing options nearby for easier access to campus.

Some universities, especially those with a significant graduate student population, are developing housing specifically tailored to graduate students, as the private rental market may not adequately meet their needs. Additionally, several institutions offer international students specialized orientations or early move-in options to ease their transition. While these programs do not involve separate housing, they do help students acclimate before the general campus population arrives.

However, the high cost of newer residence halls often drives international students—particularly those from price-sensitive groups, such as Indian students—to seek more affordable off-campus alternatives, where they can reduce expenses by sharing accommodations and cooking meals.

International Student Preferences Related to Student Housing

Across different institutions, international students frequently prioritize cost-effective arrangements, choosing between shared or private spaces based on their budget.

International undergraduates, often guided by parental concerns for safety, are more likely to live on campus, where they benefit from a structured social environment that creates a sense of belonging through social and academic activities.

Meanwhile, graduate students generally lean toward single-occupancy or apartment-style living, balancing privacy with shared common areas like kitchens and bathrooms. This setup appeals to those seeking quiet, independent environments while allowing for communal interaction.

A significant increase in students from the Indian subcontinent, for instance, has driven demand for affordable, off-campus housing options. Students from these regions often prefer to live close to campus in shared apartments, influenced by community bonds and practices where graduating students pass along housing options to new arrivals.

Universities have also begun to address religious and cultural needs by incorporating features like ablution rooms for prayer into their housing options. The trend toward private rooms or suite-style layouts, which combine individual bedrooms with shared living spaces, is seen as a potential solution to encourage social interactions and reduce feelings of isolation among international students. While affordability and proximity to campus remain top priorities, universities are increasingly adapting their accommodations to meet diverse preferences, ranging from privacy and community engagement to cultural inclusivity.

U.S. institutions are increasingly aware of the growing trend where students prefer off-campus housing over on-campus. A key factor contributing to this shift is the lack of flexibility in meal plans, with many institutions enforcing mandatory meal plans for on-campus residents. This rigid approach to meal offerings limits students' preferences, leading to demand for off-campus housing where students can have more control over their living and dining arrangements.

Universities' Views on Differences Between Undergraduate and Graduate International Students' Preferences

International students' housing needs often differ based on whether they are undergraduates or graduates because of their ages, finances and past experiences.

For international undergraduates, many universities require freshmen to live on campus. Often, this aligns with both parental expectations and the students' younger age. For instance, on-campus living often eases the transition to a new country and offers greater community engagement and sometimes meal plan options. Many institutions design residence halls specifically to create interactions and connections among younger students.

Undergraduate students and their parents prioritize safety and security, often perceiving on-campus housing as a safer option. Additionally, universities typically provide dedicated student housing staff, a resource valued by both students and parents, especially during the initial years of study. Similarly, in Europe, while some students choose university-managed housing, many international students opt for private purpose-built student accommodation. The primary reason for this choice is the security and safety provisions that private student housing typically offers. Students perceive these housing facilities as more secure, especially in larger cities or areas with higher crime rates.

U.S. institutions report that undergraduate students are generally less price-sensitive than graduate students, who are more cost-conscious due to often self-funding their studies and accommodation. Despite this, affordability is becoming an important consideration for undergraduate students as well.

Finally, universities tend to assign international students to buildings that remain open during breaks to accommodate those who do not travel home. In this way, institutions recognize the undergraduates' greater need for support and accessibility to resources year-round.

Graduate students, however, tend to prefer off-campus housing due to their different priorities, including affordability, privacy and proximity to campus. While they opt for off-campus options, they still seek accommodations close to campus. Many graduate students, particularly those from countries like India, Nigeria and increasingly China, arrive with a predisposition toward cost-effective housing, often facilitated through informal networks of current students.

Privacy and convenience are highly valued by this group, leading them to favor apartments with individual rooms and shared amenities like kitchens. Graduate students are generally more self-sufficient and accustomed to managing their own affairs, which often makes off-campus housing more appealing.

Graduate students often prefer to distance themselves from the traditional undergraduate campus life, seeking more relaxed and quieter living environments.

Family housing is another area where institutions see demand from international graduate students, who may come with dependents and need accommodations that can support family life. While some universities provide family housing or private apartments for graduate students, others lack these options, which can drive students with families to seek suitable living arrangements off-campus.

International Student Feedback

Within the two focus groups with undergraduate and graduate students, the research aimed to better understand their preferences and needs in student housing. These qualitative discussions revealed the students' emphasis on affordability, community and convenience.

For undergraduates, the primary considerations involved finding a compromise between private and shared living spaces, with a preference for smaller, functional spaces that meet both financial and social needs. There was a strong call for ensuring security.

Graduate students prioritized privacy and cost-effectiveness, while also considering proximity to campus.

TABLE 3:
Main Differences and Preferences of International Undergraduate and Graduate Students

	Undergraduate	Graduate
Living situation	The preferences in student housing largely revolve around a trade-off between the desire for privacy and the need for affordability. While many students would opt for single rooms if financially feasible, shared housing remains a practical choice for those seeking cost savings and a community-oriented lifestyle.	The focus group shows varied housing preferences among international graduate students in the U.S., shaped by personal needs and circumstances. Some students preferred living with roommates for social support, a sense of community and shared experiences. For instance, one student chose roommates to adapt to U.S. college life before his wife joined him, while another valued the social balance outside academics. One participant preferred living alone due to the need for privacy to avoid distractions and maintain focus. Overall, those with prior experience living with roommates continued to find it practical and comfortable.
Preferred space to live	Students typically favor smaller, functional living spaces that strike a balance between comfort and affordability. While studio apartments or one-bedroom setups are often ideal, the cost can outweigh the benefits of having a private room. Therefore, it is important to offer a mix of private room options and shared living arrangements to achieve a compromise.	Most students preferred houses and apartments for the larger space, allowing them to engage in hobbies like playing musical instruments. They wanted a setup that felt distinct from a hostel or dorm experience. Sharing apartments allowed for a balance of shared living and privacy. One student, accustomed to smaller apartments in Japan, found even small rooms in U.S. dorms spacious enough. They did not prioritize size, as they spent little time in their living space, opting instead to use communal study areas.
Community	The ideal student community in housing should create a supportive, inclusive and balanced environment where students feel comfortable and safe. Students generally appreciate shared spaces and interactions with roommates. Common meeting areas include shared kitchens, laundry rooms or even just brief encounters in hallways. Most students prefer living in a mixed-nationality environment, valuing the diversity and opportunity for cultural exchange.	Many preferred a mix of graduate students from different disciplines. This diversity enhances social interactions and provides a balanced environment. One participant mentioned structured weekly social events, like a Friday movie night in a three-bedroom house, while others noted more casual and infrequent interactions. Kitchens emerged as the most common place for socializing, with spontaneous interactions occurring during meal preparation. These settings provided opportunities to share cultural experiences through cooking and tasting different cuisines.

TABLE 3 *cont'd*:
Main Differences and Preferences of International Undergraduate and Graduate Students

	Undergraduate	Graduate
Key factors in decision-making	1. Location and proximity: Being close to the campus is a top priority for many, reducing commuting time and making access to classes and campus facilities easier. Ideally, accommodation should be within a 10–15-minute commute. 2. Safety: The safety of the area is essential, especially for students who are new to the city or country. 3. Cost and amenities: Affordability is important, and many students prefer accommodations that include utilities in the rent. Access to amenities like in-unit laundry, gym facilities and free Wi-Fi can also be significant factors. 4. Living with friends or roommates: Some students preferred living with friends or people they know.	1. Location: Location emerged as a top priority for many, with preferences for quiet neighborhoods or areas with convenient access to transportation. Some students valued proximity to campus, aiming for a short commute, while others prioritized being near public transit, supermarkets and other amenities. 2. Cost: Cost was a significant factor, especially for international students dealing with currency exchange challenges. Affordability was crucial, often influencing decisions more than location or other amenities. 3. Safety: Safety was a concern for some students, impacting their choice of neighborhoods and accommodation types. 4. Living arrangements and amenities: Some students preferred private bathrooms, valuing personal space over shared amenities.
Amenities	**Bare-minimum amenities:** Reliable Wi-Fi and access to laundry facilities is a fundamental requirement for most students. Safety is a top priority, with expectations for secure entrances and well-maintained premises. Additionally, having a bathroom with limited sharing (preferably private or shared with a few people) is important, especially for privacy and comfort. Finally, a quiet study space that creates a comfortable study environment is often sought after. **Willingness to pay extra:** Many students are open to paying extra for enhanced amenities that improve comfort and convenience, such as communal kitchens, better security or gyms. However, the decision to pay more depends on the perceived quality and accessibility of these facilities.	**Bare-minimum amenities:** Laundry facilities were a must-have for nearly all participants, often considered the top priority. Private bathrooms were also commonly viewed as essential. Private kitchens were preferred by some students as an effective way of saving money and cooking their national foods. **Willingness to pay extra:** A garage was important for those with cars, especially in colder climates, while bike parking was noted by a participant without a car. There was reluctance to pay extra for amenities like gyms and green spaces, as many felt these are often offered at universities free of charge.
Commute to campus	Students expressed that a short commute is ideal, with many favoring a walking distance of 10 to 15 minutes.	For those who drive, a commute of up to 15 minutes was considered acceptable, while anything longer was less desirable. Cyclists preferred a maximum commute of 10 minutes by bike. Bus commutes of up to 20 minutes were acceptable, including walking time. Those walking and using public transportation, such as the metro, considered a 30-minute commute appropriate.
Missing amenities	Affordability was a primary concern, with calls for price regulation. Additionally, students emphasized the importance of better organization, including improved communication about available services and maintenance of facilities. Suggestions for communal spaces, such as kitchens, were proposed to create community connections and allow for home-cooked meals.	Students noted the need for more flexible leasing terms. For instance, shorter or adjustable lease durations to accommodate summer internships. A few participants highlighted the lack of fully furnished housing options, especially off campus, which could ease the transition for international students. The high cost of housing was a top concern, with several participants suggesting the need for more cost-friendly options. They expressed that the combination of rent and utilities took up a significant portion of their stipends.

TABLE 3 *cont'd*:
Main Differences and Preferences of International Undergraduate and Graduate Students

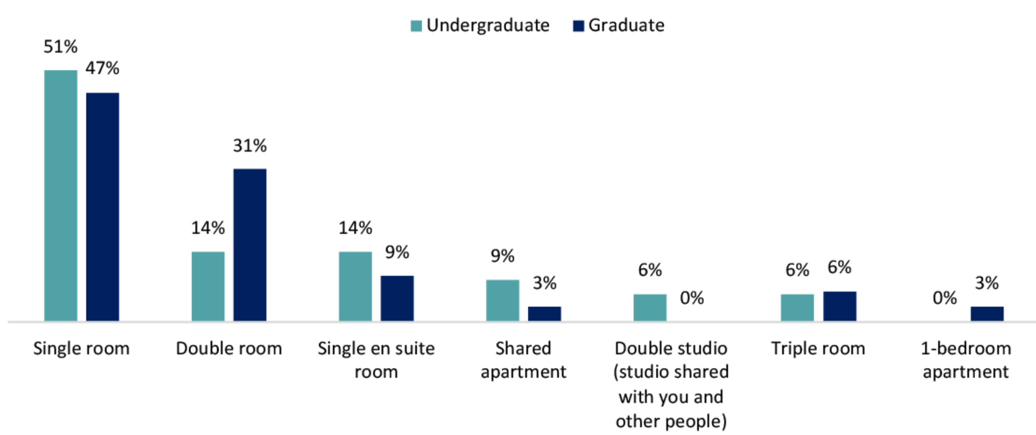
	Undergraduate	Graduate
On-campus vs. off-campus living	There was a strong preference for off-campus living among students, driven by factors such as privacy, independence, cost and flexibility. Participants emphasized the appeal of independence and personal space associated with off-campus life. Cost considerations were significant, with many noting that off-campus housing is generally more affordable than on-campus options. Despite these preferences, on-campus housing has advantages, particularly regarding access to university resources, social opportunities and reduced travel time. Some participants added the benefits of living on-campus, such as avoiding complications with landlords and the predictability that comes with university-managed housing.	Many participants expressed a preference for off-campus housing, citing factors such as privacy, cost and the desire to distance themselves from the undergraduate lifestyle. For those considering on-campus options, cost played a significant role; students indicated that on-campus housing would need to be more affordable and include amenities such as Wi-Fi and utilities to be attractive. Additionally, the lack of family-friendly accommodations on campus limits options for students with families, leading them to seek off-campus living arrangements. Privacy and independence were consistently prioritized, with participants noting that off-campus living provides a sense of freedom not found in on-campus housing. Suggestions for improving off-campus options include the addition of family-friendly spaces and essential amenities, such as laundry facilities and garages, to better meet the needs of graduate students. Overall, the consensus favors off-campus living, provided that suitable and affordable options are available.

Source: BONARD, 2024; derived from focus groups conducted with international students

In addition to the focus groups, BONARD conducted a student survey, gathering input from 70 international students representing 16 countries. Among the respondents, 51% were undergraduates with an average age of 20, while 49% were graduate students averaging 24 years of age.

The top nationalities among undergraduate students were Vietnam (25%), India (19%), Japan (17%), Singapore (8%), and China, Nigeria and Saudi Arabia (6% each). Most graduate students surveyed were from India (78%), followed by Vietnam and Bangladesh (6% each) and China and South Korea (3% each).

FIGURE 13:
Preferred Room Types



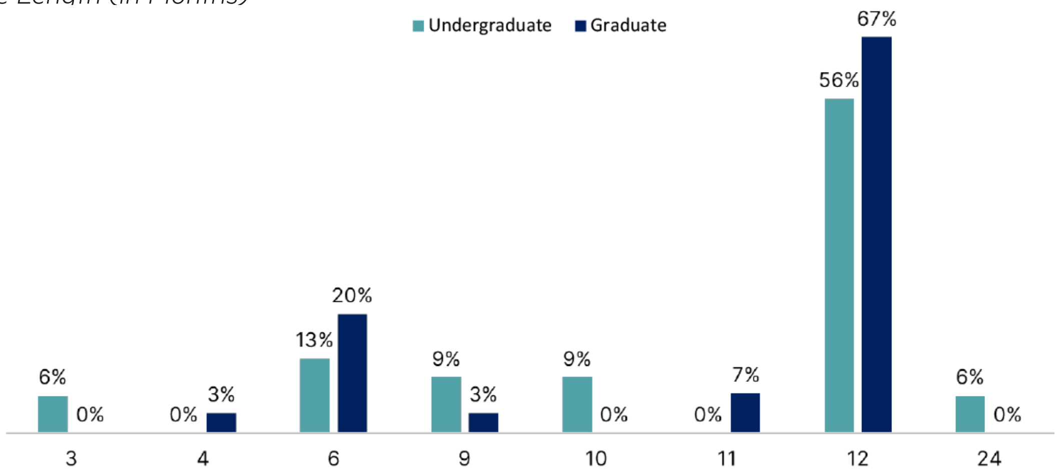
Source: BONARD, 2024; n=70 international students

Among undergraduate international students, single rooms are preferred, with over half (51%) choosing this option. Other choices, like double rooms (14%) and single en-suite rooms (14%), remain appealing, offering a balance between privacy and affordability.

Graduate international students prefer single rooms, with nearly half (47%) choosing this option, proving that graduate students value privacy. Double rooms are also popular (31%), offering a more affordable option. However, it is important to note that all graduate students preferring double rooms were from India and Bangladesh, and therefore only represent their countries. Less commonly chosen are single en-suite rooms (9%), triple rooms (6%) and shared apartments or one-bedroom apartments (each at 3%).

FIGURE 14:

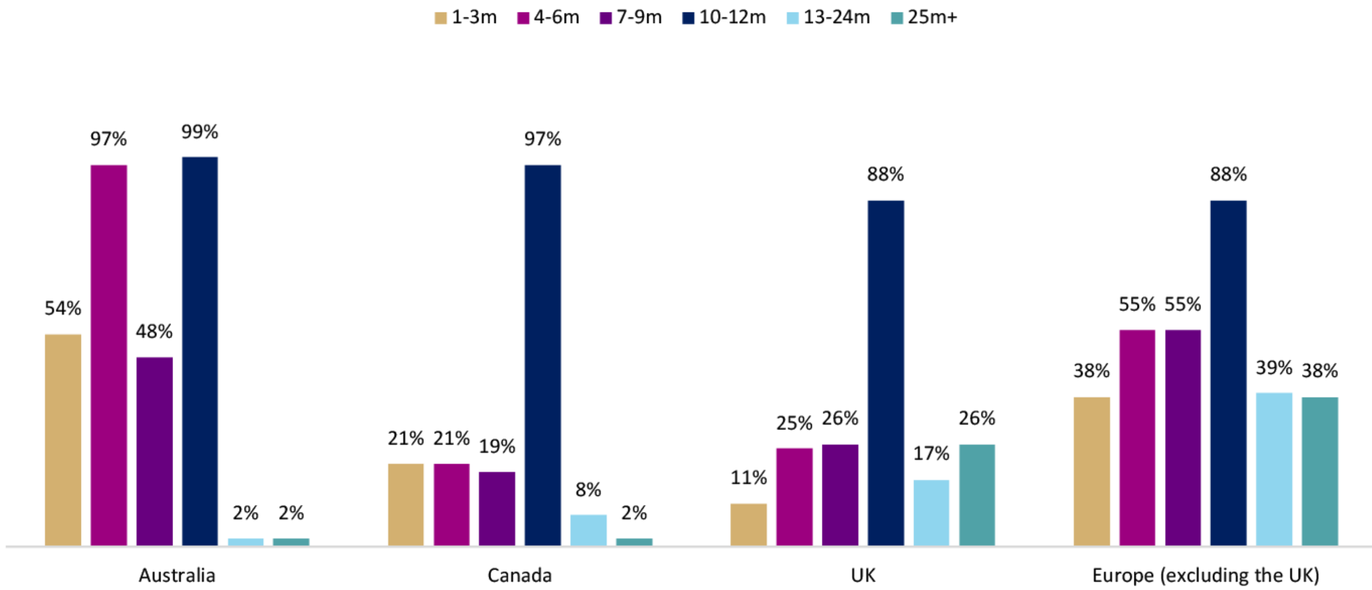
Preferred Lease Length (in Months)



Source: BONARD, 2024; n=70 international students

The undergraduates and graduates surveyed preferred a 12-month lease, at 56% and 67% respectively. A six-month lease emerged as the second most popular option for both groups.

FIGURE 15:
Case Study: Types of Contracts Offered by Private PBSA Providers, Per Region



Source: BONARD, 2023 (n=2,633), multiple options possible

The most common contract length on offer across the sector is 10–12 months, in line with the duration of the typical academic year. However, differences were observed among destinations, as operators provide contract lengths that best suit the needs of the local student population.

Short stays of 1–3 months were more common in Australia, where 54% of private purpose-built student accommodation (PBSA) operators offered this option, and in Europe (38%) than in the U.K. (11%). Contract lengths exceeding 25 months were offered by 38% of private PBSA operators in Europe, but they were uncommon in Australia and Canada.

Factors of Importance

The research explored factors of importance to create an informed view of student decision-making. The findings reveal a strong correlation between insights from university representatives and student interviews.

1. **Cost**
   Affordability is the foremost concern for international students choosing student housing. The cost of housing significantly impacts their overall study experience, and many students prioritize options that provide the best value for their money. This is particularly true for graduate students, as they often fund their own studies and housing. Additionally, certain nationalities, such as Indian and African students, are more price-sensitive and may be willing to sacrifice privacy in favor of lower costs. Currency strength is also a key factor for Japanese students, for instance, who have been impacted by fluctuations in the yen.

2. **Location**

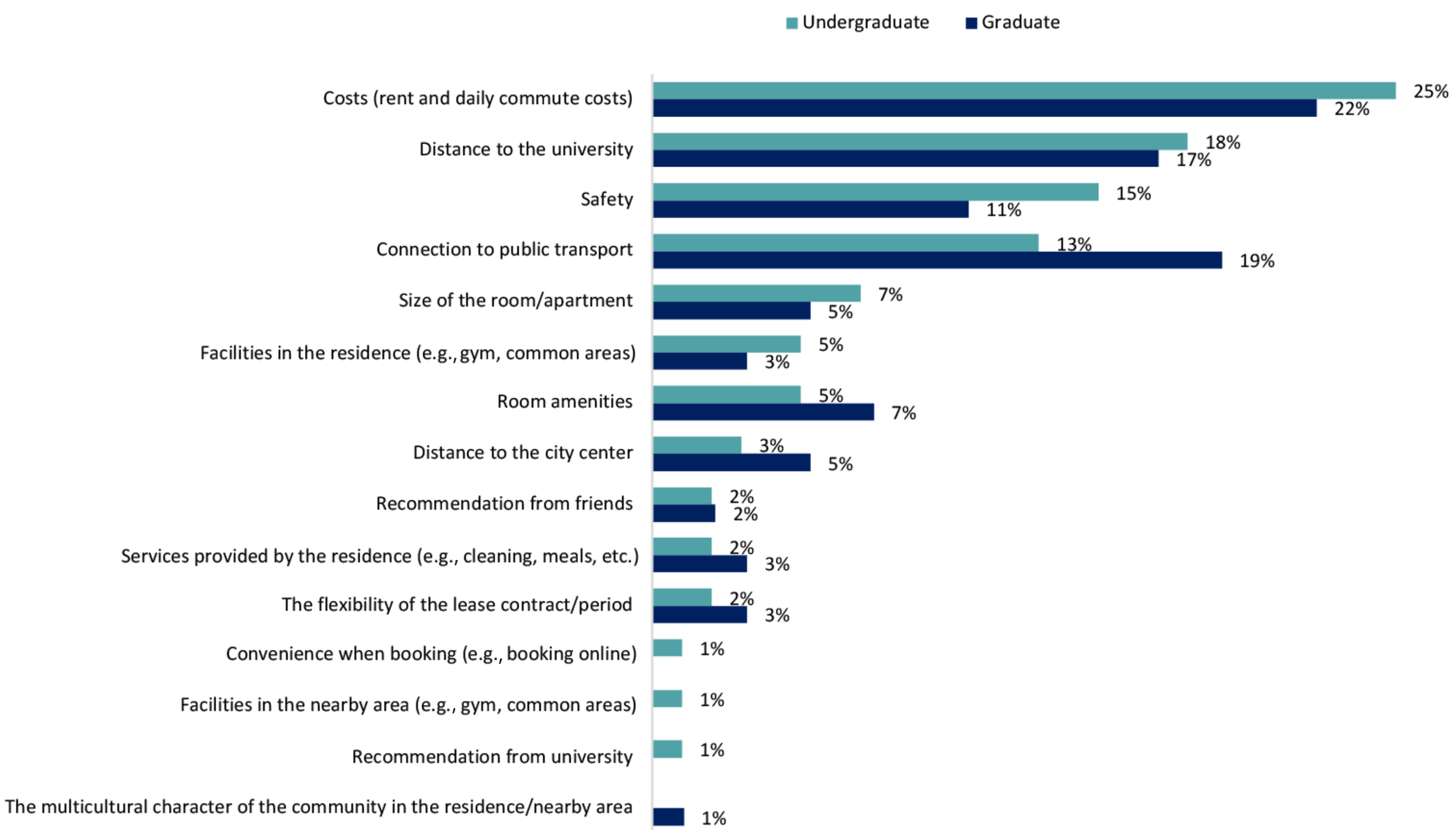
   Proximity to campus also plays a crucial role since many international students do not have cars and rely on easy access to classes, either by foot, bicycle or public transport. Location and ease of commuting directly affect students' daily routines and ability to attend classes punctually, making it a top consideration.

3. **Amenities**

   Amenities like common lounges, private bathrooms and kitchen spaces are increasingly significant as they provide a comfortable and practical living experience. Some universities have disclosed that students automatically reject on-campus housing if it does not include a kitchen.

FIGURE 16:

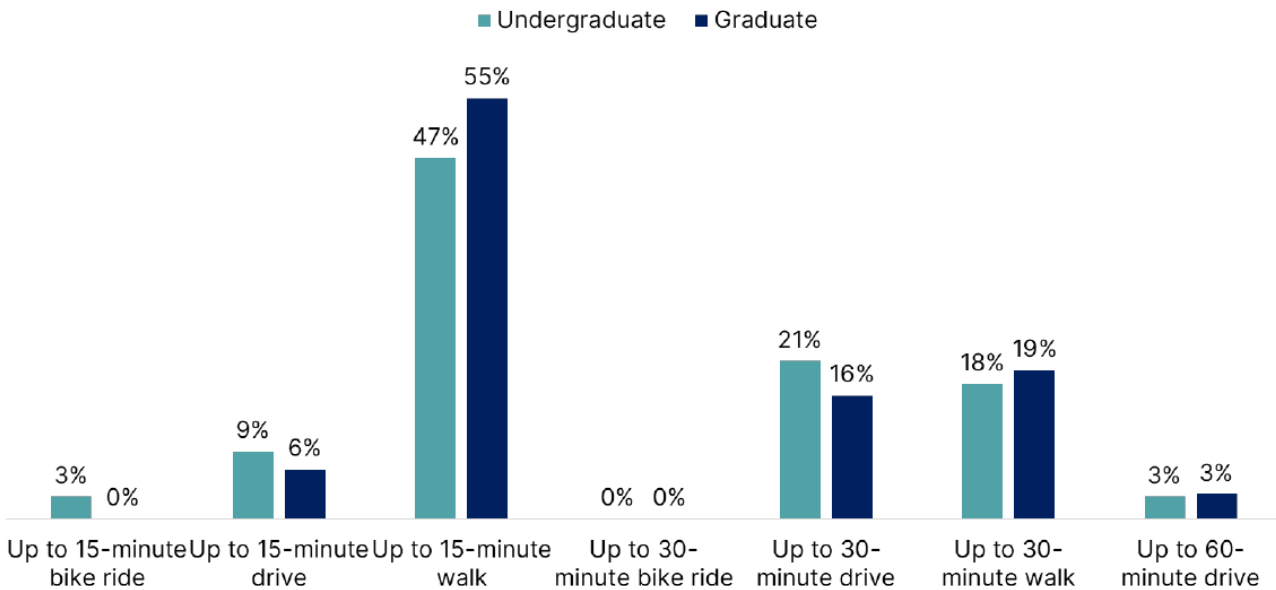
Factors of Importance International Students Consider When Choosing Housing



Source: BONARD, 2024; n=70 international students

Undergraduate students place more emphasis on safety (15%) compared to graduates (11%). Younger and less experienced students show a heightened concern for security while adjusting to new environments. Graduate students, on the other hand, show a stronger preference for access to public transport (19% versus 13% of undergraduates). Graduate students are likely to need greater mobility to manage living off-campus commitments and to commute to campus and their part-time jobs.

FIGURE 17:
Longest Commute Acceptable to Campus from Student Housing



Source: BONARD, 2024; n=70 international students

The majority of undergraduate international students, 47%, consider a walk of up to 15 minutes acceptable, highlighting the importance of proximity. Additionally, 21% are willing to accept a commute of up to 30 minutes by car, while 18% are open to a 30-minute walk.

Graduate international students strongly prefer short commutes to campus, with 55% indicating that they find a 15-minute walk acceptable. Additionally, 16% are willing to commute up to 30 minutes by car, while 19% find a 30-minute walk acceptable.

Preferred Amenities

From access to community kitchens to convenient on-site laundry facilities, amenities play an important role in helping students feel at home while adapting to student housing. Many universities strive to offer living spaces that provide not only convenience and affordability but also opportunities for social engagement and cultural exchange. These findings demonstrate agreements between university representatives and students.

1. **Kitchen Facilities**
   Many international students express a strong preference for access to community or private kitchens, allowing them to prepare food that aligns with their dietary preferences or cultural practices. This is especially valued when dining hall options do not fully meet their dietary needs (e.g., halal, vegetarian, vegan). International students also value community kitchens not just for cooking but for socializing with peers.

2. **Laundry Facilities**
   In-residence laundry, ideally included in the housing cost, is highly convenient for international students. It avoids the need to find off-campus options and offers a valuable, built-in amenity that minimizes additional costs and logistical challenges.

3. **Religious and Cultural Accommodations**
   Amenities such as prayer rooms or meditation spaces are appreciated, especially for students who require private spaces for religious practices. In some cases, these are designed as "silent rooms" to meet institutional requirements while serving students' needs.

4. **Private Bathrooms**
   International students generally prefer private bathrooms over shared ones. Privacy is often highly valued, and having a private bathroom can offer greater comfort, especially for students from cultures where modesty and privacy are emphasized. However, some students are open to shared bathrooms if it means more affordable housing, but they still tend to appreciate facilities where they have privacy, whether for religious or personal reasons.

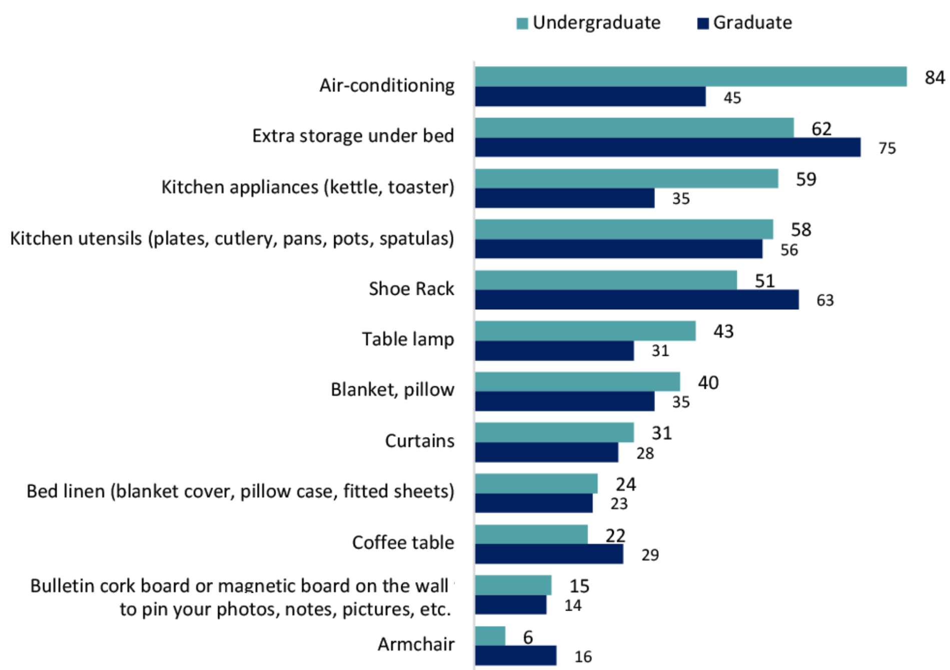
5. **Common Areas**
   Common areas like living rooms or lounges are very popular among international students, as they serve as essential social spaces where students can connect, relax and feel part of a community. These areas cultivate friendships and cultural exchanges. Lounges and shared living rooms allow students to watch TV or movies, play games and organize small gatherings.

6. **Gyms and Wellness Centers**
   Although on-campus fitness facilities are appreciated, they are not a top priority within the residence halls themselves. Access to a centralized campus gym usually suffices, especially if it is available at a low cost or is included in student fees.

7. **Transportation and Parking**
Proximity to public transportation, or campus-provided micro-mobility options like e-scooters and bikes, is important for students without cars. Ease of commuting to campus and around town is a consideration for those trying to minimize transportation expenses. Having access to free parking is especially important for graduate students who have a car.

8. **Summer Storage**
With many international students departing for the summer, having summer storage in-house is essential. Since some universities do not offer summer storage, housing representatives are strongly advocating for the addition of these spaces to help students avoid the need for alternative, pricey solutions.

FIGURE 18:
Top Features Undergraduate and Graduate International Students Would Like to Have in Student Housing (Score-Based Ranking)



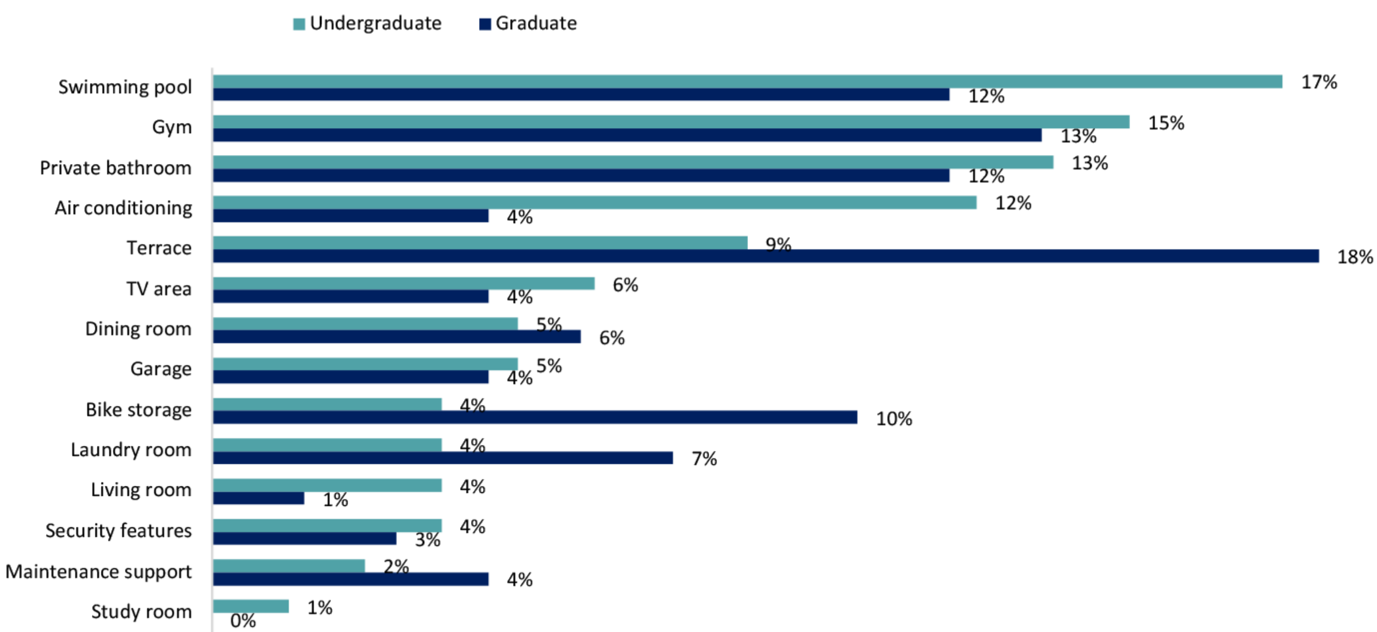
Source: BONARD, 2024; n=70 international students

International undergraduate students placed the highest importance on air conditioning, with a score of 84, due to varying climate preferences and needs. Air conditioning ranked first for undergraduate students from Vietnam and Japan. Extra storage under the bed followed with a score of 62. There is a desire among international undergraduate students to use space efficiently, which is particularly valuable in compact student housing. Kitchen appliances (59) and utensils (58) were also rated highly. A shoe rack, scoring 51, emerged as one of the top five features.

For graduate students, the highest priority in student housing amenities was extra storage under the bed, with a score of 75. The second-highest-rated feature was a shoe rack (63). Kitchen utensils followed with a score of 56. Interestingly, air conditioning scored lower for graduate students (45) than undergraduates. European students, for example, prefer natural airflow over air conditioning – having windows is crucial to these students. Similarly, Indian students, representing 78% of the surveyed graduates, ranked air conditioning ninth.

FIGURE 19:

Amenities Undergraduate and Graduate International Students Miss in Current Housing

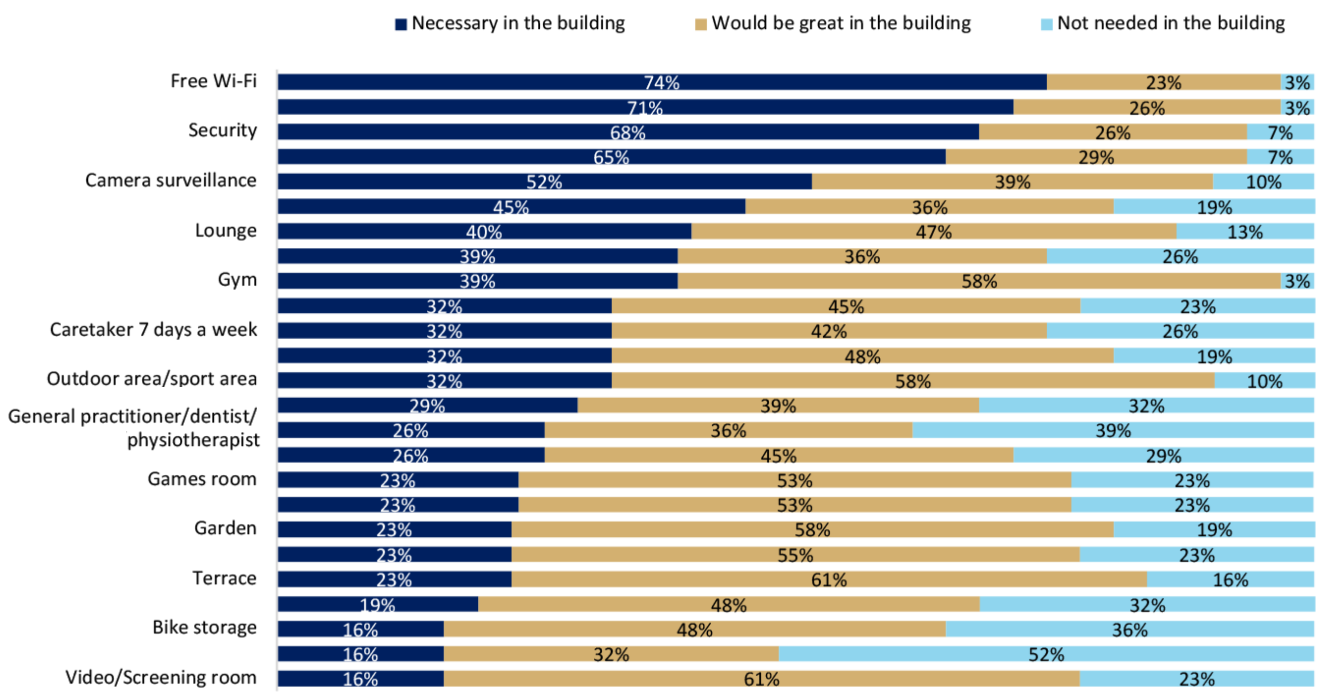


Source: BONARD, 2024; n=70 international students

While swimming pools and gyms are among the most commonly cited missing amenities in student housing, students generally find them unnecessary if their institution already provides free access to these facilities on campus. For this reason, understanding the specific amenities available at nearby U.S. institutions and the needs of the student population is essential when planning a student housing complex. In this way, developers can avoid redundant facilities and instead focus on amenities that enhance students' housing experience.

FIGURE 20:

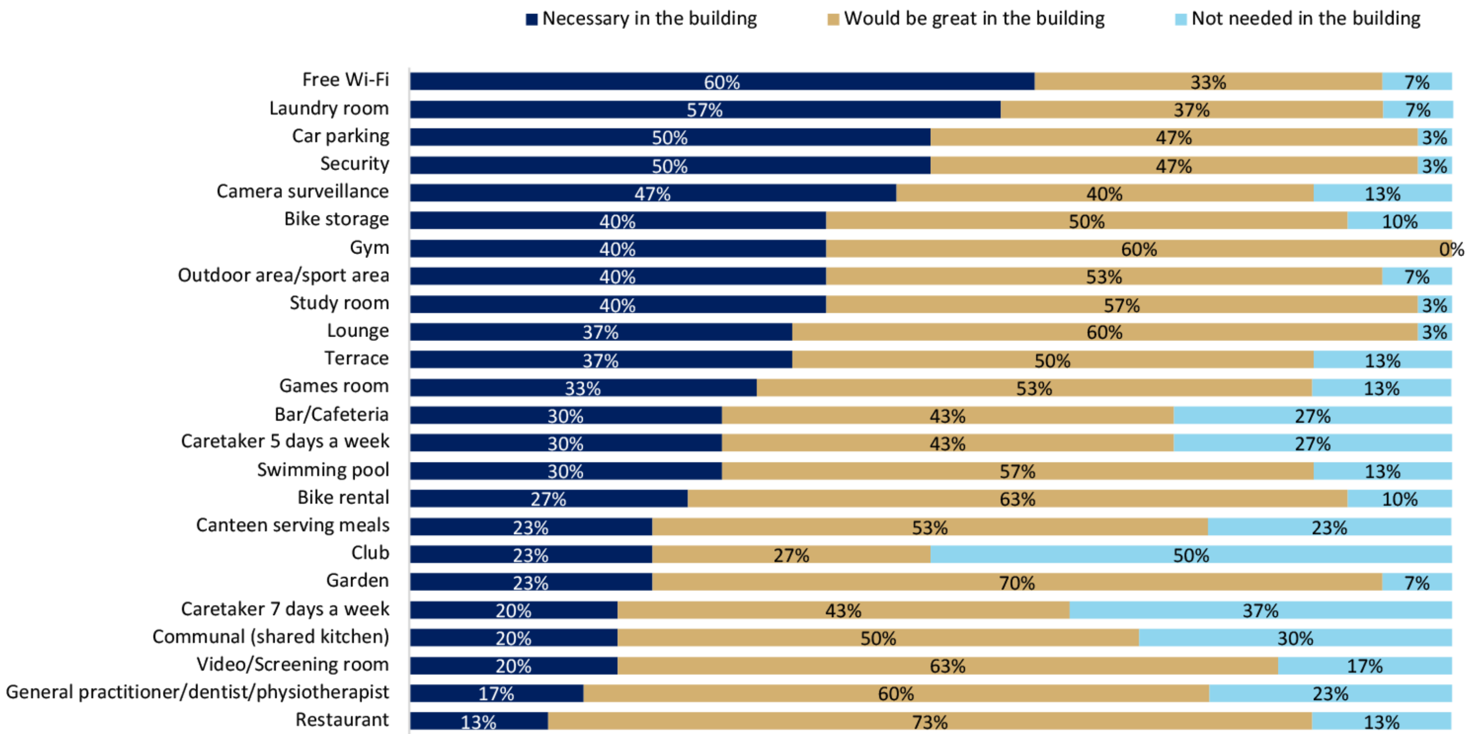
Amenities Preferred by International Undergraduate Students



Source: BONARD, 2024; n=36 international students

The most sought-after features among international undergraduate students include free Wi-Fi (74%), a laundry room (71%) and security measures (68%). Similarly, graduate students seek free Wi-Fi (60%) and laundry room (57%), albeit to a lesser extent. These findings correspond with the insights provided by university representatives.

FIGURE 21:
Amenities Preferred by International Graduate Students



Source: BONARD, 2024; n=34 international students

Cultural Considerations

A common consideration for U.S. institutions as well as housing developers and operators is determining how to adapt student housing to align with cultural norms or how to effectively explain American-style living to the international community.

The following regional and cultural preferences are among the most commonly considered by U.S. institutions when designing future student housing concepts:

Prayer and Meditation Spaces

The need for reflection or prayer spaces has become more prominent, especially among students from religious backgrounds. Understanding the nationality composition of students on campus can help housing providers design layouts and amenities that cater to specific cultural needs.

Access to Kettles and Other Appliances

Many students from Asian countries have a strong preference for access to water kettles to prepare tea and hot water, as well as microwaves and mini-refrigerators.

Gender-Specific Housing Options

Some international students (and their families) inquire about gender-specific housing, especially in countries where shared gender accommodations may be less common. Those institutions with gender-neutral bathrooms have created bigger and private cubicles for privacy.

Guide to Kitchens and Appliances

American-style kitchens may be different from kitchens international students are used to. Therefore, it is beneficial to introduce guidelines on how to use hobs and stoves for safety and ease of use.

Privacy versus Shared Spaces

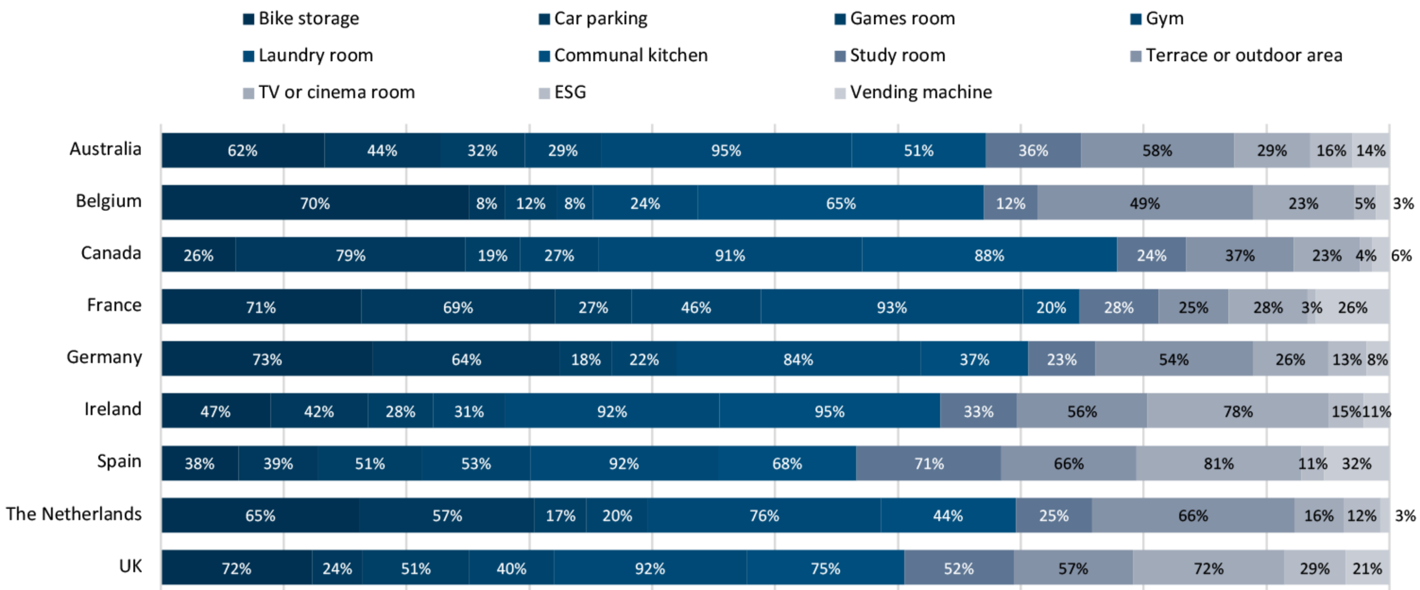
Students from different regions have varied comfort levels with privacy in shared accommodations. For example, many Indian and sub-Saharan African students may be comfortable with shared living arrangements. Accommodating different layouts, from private rooms to shared spaces, allows students to choose what best suits their preferences and budgets.

Social and Recreational Spaces

Recreational spaces tailored to different interests are increasingly in demand. For instance, adding a ping-pong table, gaming zones or even cultural event spaces within residence halls can help students build a sense of community and engage in activities that bridge cultural divides.

FIGURE 22:

Case Study: Amenities Provided in Private PBSA Across Selected Destinations

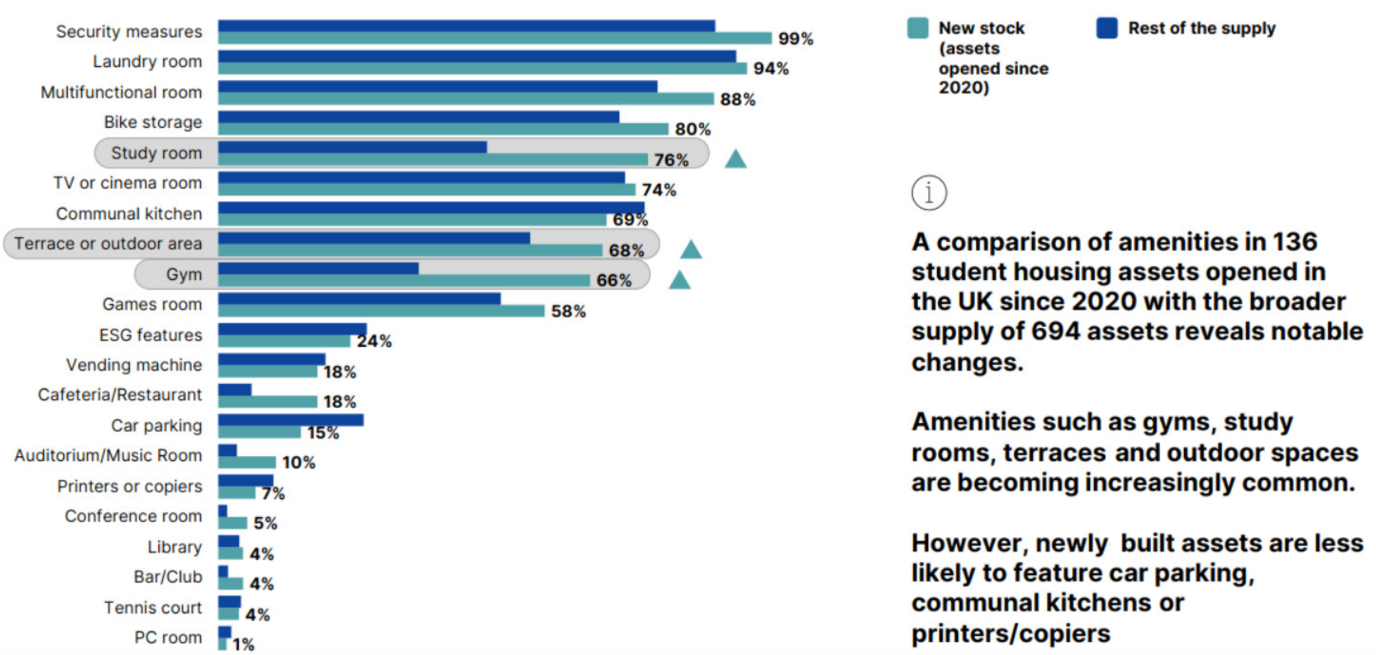


Source: BONARD, 2024, n=3,042 PBSA assets. The table shows a percentage of assets offering a specific amenity. For example, 62% of assets in Australia offer bike storage.

FIGURE 23:

Case Study: Amenities Offered by News Stock vs. Rest of the Supply in the U.K.

The number of residences with a significant ratio of community space is increasing. Gyms, games rooms and terraces are the amenities most clearly on the rise. On the other hand, car parks are gradually becoming less common.



Source: BONARD, 2024; n=830 PBSA assets

Recommendations

The study identified several key considerations and provided recommendations (in order of importance) for adapting to the evolving demand structure and shifting student preferences:

Affordability

Student housing affordability is a concern for international students, many of whom face tight budgets due to exchange rates, visa fees and limited financial resources (worsened economic conditions at home). Institutions also recognize that students will likely choose more affordable off-campus options if available. It is essential then to stay aware of market rates and adjust pricing policies to remain competitive and attract more students. Hence, offering simple yet comfortable housing options near campus would provide the new generation of students with more budget-friendly choices.

Additionally, a strategic review of the student housing offer is recommended. The U.S. already has enough variability in stock, which surpasses the supply available in competing markets like Australia and Canada. However, the stock needs to be effectively leveraged in order to emphasize the choices available to prospective students.

Location

Close proximity to campus remains a key part of the value proposition as many international students, especially undergraduates, do not have cars and rely on walking or public transportation to get around. Ensuring housing is within walking distance or offers easy access to transport links can make a significant difference.

Room Types

To improve the financial viability of new concepts, it is advised to provide a variety of room options to cater to different preferences and budgets. This includes ensuring availability of both single and double rooms for undergraduate and graduate students while also offering apartment-style and family rooms specifically for graduate students with families.

Furthermore, there is a clear preference for fully furnished rooms, as they offer convenience and reduce the need for students to invest in furniture.

The research also revealed that international students have a strong understanding of off-campus rent prices. Therefore, it is recommended to regularly evaluate off-campus housing costs to ensure that on-campus housing remains competitively priced.

Amenities and Facilities

The research highlighted the following preferences to enhance the living experience of international students:

- **Introduce and promote complimentary laundry facilities,** as this is a key preference for international students looking to save on additional costs.
- **Offer kitchen facilities,** as international students often prefer cooking their own meals over using meal plans.
- **Privacy and personal space** are important for many international students who might be adjusting to a new cultural environment. Offering rooms with private bathrooms or creating layouts where students can enjoy their own personal space while still having access to shared community areas can help students feel more comfortable.
- **Ensure strong security measures,** including 24/7 surveillance, secure entry points or on-site personnel, to provide a safe living environment for international students. This is especially important to undergraduate students, as well as their parents, as this might be the first time they traveled abroad on their own.
- **Include a summer storage** for students to keep their personal belongings at the facility.

Leases and Contracts

Offering 10- and 12-month lease options would better align with varying academic schedules and student preferences, making the housing offering more appealing.

Furthermore, student feedback suggests exploring the option of allowing international students to sign housing contracts only after their visas are approved, reducing financial risks for this group. Additionally, retaining a portion of available housing specifically for international students until the summer would address the needs of late arrivals and those facing visa-related delays, ensuring a more inclusive and supportive approach.

Social Program

Creating social programs to foster a sense of community among international students is strongly recommended. These initiatives not only enhance the overall appeal of the offering but also contribute significantly to students' well-being and increase retention. Activities such as cooking competitions, cultural exchange events and group workshops can serve as recreational and bonding opportunities and can be managed by residents themselves.

Interviewed institutions also suggested introducing welcome programs for international students. These have proved to be crucial in adapting to life in the U.S. and have eased the transition.

Some universities organize events during breaks for students remaining on campus, creating a more enjoyable and engaging experience. Having residence halls available over break periods (Thanksgiving, winter or spring break) is essential. The availability of winter and summer break housing supports students who need continuous residence due to visa restrictions or long travel distances.

Communication

Considering it an integral part of successful student services, housing policies need to be clearly communicated, particularly those unfamiliar to international students, such as alcohol rules. Collaborating with the international student office will ensure comprehension and address language barriers. It is recommended to avoid punitive approaches when students inadvertently break rules due to cultural misunderstandings.

Providing specialized training for residence life staff and RAs in collaboration with the international student office will minimize these cultural misunderstandings. The interviewees emphasized the importance of equipping housing staff to handle cultural differences, dietary habits and potential roommate conflicts. Implementing roommate agreement processes will address these challenges.

Further Research Recommendations

This study presented findings that highlighted shifting preferences, key priorities and areas requiring further exploration. It provided a broad overview of current and anticipated student housing preferences, laying the groundwork for additional in-depth or targeted research.

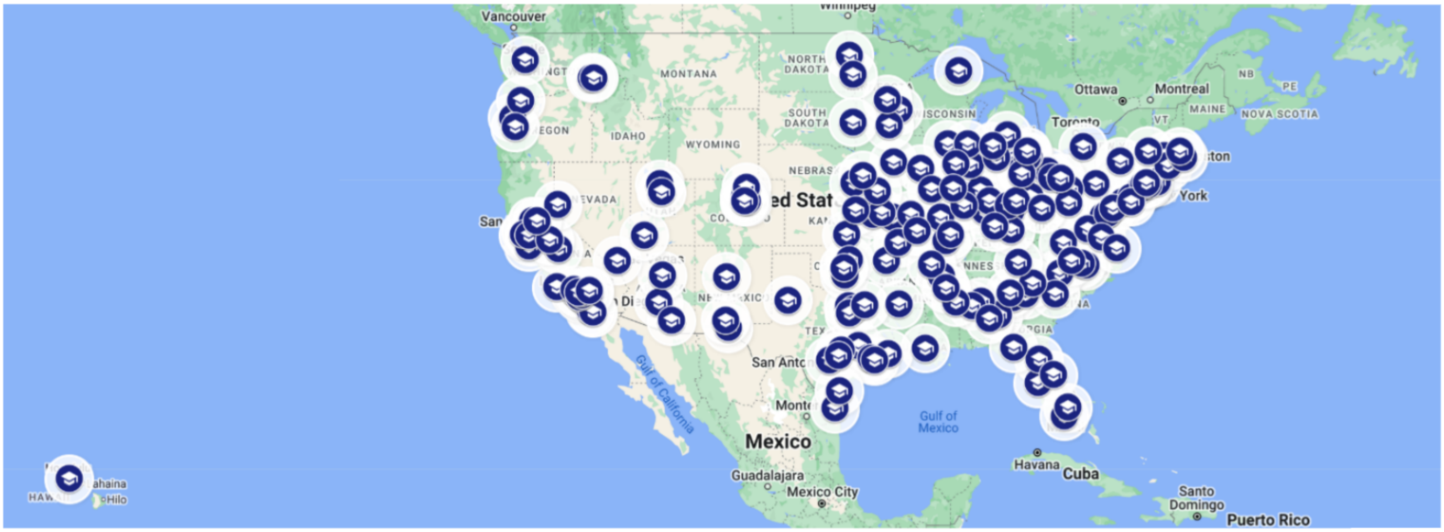
For instance, future strategies will benefit from understanding the price sensitivity of international students, particularly when faced with the gap between their natural preference for a single room and the financial constraints that lead them to opt for double occupancy. Understanding the tipping point at which cost outweighs preference will be key to developing realistic building plans.

To ensure accuracy and representativeness, a robust sample should be included, focusing on a diverse range of students, including those from well-off backgrounds. This will help capture the preferences and housing needs of different socioeconomic groups.

Further study could also focus on analyzing the profiles of nationalities of international students projected to drive future enrollment growth. Understanding their specific housing preferences, cultural needs and financial capacities will allow universities and housing providers to proactively align their offerings with emerging trends.

Appendix

Overview of the Largest 175 U.S. Public University Campuses by the Number of International Students (2022)



Institution - Campus name	International students: Undergraduate	International students: Graduate	International students: Total	Domestic students: Total	Total student population	Share of international students
University of Illinois Urbana-Champaign	5,343	7,448	12,791	44,125	56,916	22%
Georgia Institute of Technology-Main Campus	1,870	10,525	12,395	32,901	45,296	27%
Arizona State University, Campus Immersion	4,429	7,179	11,608	68,457	80,065	14%
Purdue University-Main Campus	4,249	5,191	9,440	42,088	51,528	18%
University of Michigan-Ann Arbor	2,866	6,014	8,880	42,345	51,225	17%
University of California-San Diego	4,607	3,979	8,586	33,420	42,006	20%
University of Washington-Seattle Campus	4,466	3,733	8,199	44,120	52,319	16%
University of California-Berkeley	4,163	3,997	8,160	37,147	45,307	18%
Pennsylvania State University-Main Campus	4,599	3,304	7,903	42,125	50,028	16%
University of Wisconsin-Madison	3,861	3,470	7,331	41,625	48,956	15%
University of North Texas	1,452	5,653	7,105	37,662	44,767	16%
The University of Texas at Dallas	897	6,032	6,929	24,641	31,570	22%
University of California-Los Angeles	2,853	3,717	6,570	39,860	46,430	14%
University at Buffalo	2,624	3,871	6,495	25,604	32,099	20%
University of California-Davis	4,216	1,919	6,135	33,544	39,679	15%
University of California-Irvine	3,747	2,358	6,105	29,832	35,937	17%
The University of Texas at Arlington	1,116	4,979	6,095	37,851	43,946	14%
Ohio State University-Main Campus	3,200	2,603	5,803	54,737	60,540	10%
University of South Florida	3,248	2,489	5,737	43,863	49,600	12%
Texas A & M University-College Station	689	4,757	5,446	68,568	74,014	7%
Indiana University-Bloomington	1,890	3,524	5,414	41,591	47,005	12%
Rutgers University-New Brunswick	2,717	2,501	5,218	45,419	50,637	10%
University of Minnesota-Twin Cities	1,947	3,234	5,181	49,774	54,955	9%
The University of Texas at Austin	1,915	3,202	5,117	47,267	52,384	10%
Florida International University	3,381	1,605	4,986	50,623	55,609	9%
University of Florida	906	4,045	4,951	50,260	55,211	9%
University of Maryland-College Park	1,117	3,660	4,777	36,015	40,792	12%
University of Houston	1,784	2,603	4,387	42,313	46,700	9%
Michigan State University	2,340	2,031	4,371	45,652	50,023	9%
University of Illinois Chicago	1,642	2,621	4,263	29,484	33,747	13%
University of Cincinnati-Main Campus	1,440	2,761	4,201	36,954	41,155	10%

Institution - Campus name	International students: Undergraduate	International students: Graduate	International students: Total	Domestic students: Total	Total student population	Share of international students
University of Massachusetts-Amherst	1,811	2,359	4,170	28,059	32,229	13%
North Carolina State University-Raleigh	784	3,185	3,969	32,731	36,700	11%
George Mason University	1,468	2,449	3,917	35,132	39,049	10%
Virginia Polytechnic Institute and State University	1,380	2,504	3,884	34,286	38,170	10%
University of California-Santa Barbara	2,781	977	3,758	22,662	26,420	14%
Stony Brook University	1,736	1,860	3,596	22,114	25,710	14%
University of Arizona	1,901	1,601	3,502	45,901	49,403	7%
University of Connecticut	1,617	1,847	3,464	23,539	27,003	13%
University of Pittsburgh-Pittsburgh Campus	969	2,150	3,119	30,648	33,767	9%
Wichita State University	1,394	1,725	3,119	13,097	16,216	19%
University of Colorado Boulder	1,001	2,079	3,080	36,505	39,585	8%
University of Central Florida	1,972	1,096	3,068	65,278	68,346	4%
San Jose State University	1,176	1,875	3,051	32,700	35,751	9%
University of Utah	1,603	1,448	3,051	31,683	34,734	9%
University of Central Missouri	102	2,639	2,741	8,896	11,637	24%
Georgia State University	1,004	1,695	2,699	33,817	36,516	7%
Texas Tech University	552	2,029	2,581	37,797	40,378	6%
University of Delaware	1,132	1,422	2,554	21,485	24,039	11%
University of California-Riverside	924	1,568	2,492	24,317	26,809	9%
University of Virginia-Main Campus	829	1,628	2,457	23,625	26,082	9%
Iowa State University	832	1,611	2,443	27,526	29,969	8%
New Jersey Institute of Technology	577	1,838	2,415	9,917	12,332	20%
University of North Carolina at Chapel Hill	1,079	1,317	2,396	29,309	31,705	8%
Oregon State University-Corvallis	1,193	1,145	2,338	31,954	34,292	7%
University of Maryland-Baltimore County	493	1,738	2,231	11,760	13,991	16%
Cleveland State University	481	1,694	2,175	12,210	14,385	15%
Florida State University	592	1,481	2,073	42,088	44,161	5%
University of Georgia	367	1,686	2,053	38,554	40,607	5%
Auburn University	750	1,203	1,953	29,811	31,764	6%
Temple University	858	1,068	1,926	31,270	33,196	6%
Binghamton University	573	1,344	1,917	16,395	18,312	10%
University of North Carolina at Charlotte	507	1,401	1,908	27,643	29,551	6%
CUNY Bernard M Baruch College	1,184	712	1,896	17,958	19,854	10%
University of Kansas	791	1,046	1,837	24,871	26,708	7%
University of Colorado Denver/Anschutz Medical Campus	993	817	1,810	21,934	23,744	8%
University of South Carolina-Columbia	742	1,052	1,794	33,859	35,653	5%
University of Missouri-Kansas City	335	1,443	1,778	13,925	15,703	11%
University of Nebraska-Lincoln	709	974	1,683	22,122	23,805	7%
Indiana University-Indianapolis	448	1,231	1,679	24,300	25,979	6%
Clemson University	174	1,480	1,654	26,812	28,466	6%
University of Memphis	211	1,429	1,640	20,277	21,917	7%
California State University-Northridge	1,078	552	1,630	35,949	37,579	4%
Kent State University-Kent	642	988	1,630	24,224	25,854	6%
University of Oklahoma-Norman Campus	743	883	1,626	26,682	28,308	6%
San Diego State University	1,030	580	1,610	35,792	37,402	4%
Colorado State University-Fort Collins	596	989	1,585	31,818	33,403	5%
University of Massachusetts-Boston	784	791	1,575	14,011	15,586	10%
Louisiana State University and Agricultural & Mechanical College	506	1,065	1,571	35,777	37,348	4%
Washington State University	734	789	1,523	26,016	27,539	6%
California State University-Long Beach	878	623	1,501	37,472	38,973	4%
Oklahoma State University-Main Campus	436	1,057	1,493	23,879	25,372	6%
The University of Alabama-Birmingham	328	1,148	1,476	20,163	21,639	7%
University of Iowa	415	1,043	1,458	28,557	30,015	5%

Institution - Campus name	International students: Undergraduate	International students: Graduate	International students: Total	Domestic students: Total	Total student population	Share of international students
University of California-Santa Cruz	794	629	1,423	18,055	19,478	7%
Florida Atlantic University	707	677	1,384	28,208	29,592	5%
University of Toledo	779	600	1,379	14,166	15,545	9%
University of Missouri-Columbia	276	1,101	1,377	29,927	31,304	4%
Minnesota State University-Mankato	1,124	251	1,375	13,215	14,590	9%
Western Michigan University	746	622	1,368	15,632	17,000	8%
San Francisco State University	987	336	1,323	23,959	25,282	5%
The University of Texas-El Paso	748	546	1,294	22,586	23,880	5%
University of Wisconsin-Milwaukee	372	911	1,283	21,393	22,676	6%
University at Albany	415	867	1,282	15,376	16,658	8%
University of Hawaii-Manoa	557	713	1,270	17,804	19,074	7%
Kennesaw State University	644	623	1,267	41,923	43,190	3%
Wayne State University	318	928	1,246	22,384	23,630	5%
Portland State University	559	664	1,223	20,386	21,609	6%
University of Massachusetts-Lowell	337	879	1,216	15,937	17,153	7%
California State University-Fullerton	616	594	1,210	39,176	40,386	3%
Central Michigan University	192	1,016	1,208	13,349	14,557	8%
Saint Cloud State University	675	531	1,206	9,214	10,420	12%
West Virginia University-Morgantown	448	747	1,195	23,546	24,741	5%
The University of Tennessee-Knoxville	216	953	1,169	32,636	33,805	3%
University of Kentucky	385	779	1,164	30,383	31,547	4%
University of Arkansas	407	737	1,144	29,792	30,936	4%
Miami University-Oxford	829	294	1,123	17,984	19,107	6%
The University of Alabama-Tuscaloosa	352	766	1,118	37,526	38,644	3%
Western Illinois University	181	927	1,108	6,535	7,643	14%
Southeast Missouri State University	392	676	1,068	8,859	9,927	11%
University of New Mexico-Main Campus	389	674	1,063	20,890	21,953	5%
University of Michigan-Dearborn	187	866	1,053	7,170	8,223	13%
Lamar University	93	949	1,042	15,761	16,803	6%
Wright State University-Main Campus	149	890	1,039	8,639	9,678	11%
University of Maryland Global Campus	770	262	1,032	54,806	55,838	2%
Southern Arkansas University Main Campus	53	962	1,015	4,079	5,094	20%
University of Oregon	459	540	999	22,164	23,163	4%
Virginia Commonwealth University	450	546	996	27,086	28,082	4%
Kansas State University	332	663	995	18,727	19,722	5%
CUNY Graduate School and University Center	62	930	992	7,741	8,733	11%
Fashion Institute of Technology	912	76	988	7,137	8,125	12%
CUNY Hunter College	797	183	980	21,990	22,970	4%
Missouri State University-Springfield	428	552	980	21,555	22,535	4%
Ohio University-Main Campus	211	767	978	23,167	24,145	4%
Morgan State University	541	436	977	8,124	9,101	11%
The University of Texas-San Antonio	401	574	975	33,418	34,393	3%
California State University-East Bay	244	731	975	12,698	13,673	7%
Northern Illinois University	153	813	966	14,683	15,649	6%
Northern Arizona University-Flagstaff	444	499	943	27,143	28,086	3%
CUNY Queens College	799	131	930	16,071	17,001	5%
Southern Illinois University-Edwardsville	239	659	898	11,621	12,519	7%
University of North Dakota	431	454	885	12,991	13,876	6%
Rutgers University-Newark	168	702	870	10,147	11,017	8%
Northwest Missouri State University	115	740	855	7,650	8,505	10%
Texas A & M University-Commerce	133	712	845	10,461	11,306	7%
Auburn University-Montgomery	163	663	826	4,283	5,109	16%
The University of Texas Rio Grande Valley	444	378	822	30,737	31,559	3%

Institution - Campus name	International students: Undergraduate	International students: Graduate	International students: Total	Domestic students: Total	Total student population	Share of international students
University of Nevada-Las Vegas	441	369	810	29,850	30,660	3%
Mississippi State University	205	603	808	21,841	22,649	4%
Southern Illinois University-Carbondale	184	617	801	10,306	11,107	7%
Rowan University	232	565	797	18,738	19,535	4%
Bowling Green State University-Main Campus	358	439	797	16,123	16,920	5%
CUNY City College	555	241	796	13,693	14,489	5%
University of Nebraska-Omaha	429	354	783	14,275	15,058	5%
Arkansas State University	529	254	783	12,407	13,190	6%
Eastern Illinois University	122	645	767	8,090	8,857	9%
Missouri University of Science and Technology	108	659	767	6,313	7,080	11%
New Mexico State University-Main Campus	303	462	765	13,503	14,268	5%
North Dakota State University-Main Campus	93	669	762	11,480	12,242	6%
Oakland University	249	507	756	15,352	16,108	5%
University of Louisville	215	538	753	21,264	22,017	3%
University of Mississippi	262	488	750	21,550	22,300	3%
Illinois State University	139	597	736	19,947	20,683	4%
Michigan Technological University	46	680	726	6,337	7,063	10%
Texas State University	182	536	718	37,453	38,171	2%
California State University-Fresno	493	223	716	23,283	23,999	3%
University of California-Merced	411	298	709	8,394	9,103	8%
Old Dominion University	209	493	702	22,405	23,107	3%
The University of Texas Health Science Center-Houston	5	689	694	4,660	5,354	13%
University of Nevada-Reno	183	501	684	20,261	20,945	3%
University of North Carolina-Greensboro	244	440	684	17,294	17,978	4%
California State University-Sacramento	482	184	666	31,152	31,818	2%
University of Idaho	366	282	648	10,859	11,507	6%
South Dakota State University	258	363	621	10,706	11,327	5%
California State Polytechnic University-Pomona	405	214	619	26,884	27,503	2%
University of Houston-Clear Lake	169	448	617	7,945	8,562	7%
Southern Utah University	557	54	611	13,719	14,330	4%
University of Central Oklahoma	332	264	596	11,654	12,250	5%
Colorado School of Mines	198	396	594	6,809	7,403	8%
California State University-Los Angeles	276	313	589	25,871	26,460	2%
California State University-San Bernardino	356	230	586	19,217	19,803	3%
Grand Valley State University	236	347	583	21,065	21,648	3%
Texas A & M University-Kingsville	148	431	579	5,513	6,092	10%
Utah Valley University	566	12	578	42,521	43,099	1%
Youngstown State University	339	220	559	10,512	11,071	5%

Source: National Center for Education Statistics, 2023