



HOW MASTER'S STUDENTS CHOOSE INSTITUTIONS:

Research on International
Student Segmentation

Zhengrong Lu
Research Associate

Paul Schulmann
Research Associate

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TABLE OF CONTENTS

Reflections: Bridging Research and Practice to Advance International Student Success.....	iii
Executive Summary	v
Introduction	1
International Student Choices by Country and Region.....	2
Master’s Students from China	2
Master’s Students from India.....	4
Master’s Student from the Middle East	7
Master’s Students from Latin America	10
Master’s Students from Sub-Saharan Africa	12
Master’s Students from Europe.....	14
Conclusions and Recommendations	16
Methodology	17
Appendix	18
References	23

FIGURES AND TABLES

- Figure 1: Four Segments of International Students1
- Table 1: Institutional Attributes and Sub-Criteria1
- Figure 2: Segmentation by Country/Region1
- Figure 3: Master’s Student Segments from China.....2
- Figure 4: Most Important Institutional Attributes and Sub-Criteria for Chinese Students When Applying to a U.S. Institution3
- Figure 5: Master’s Student Segments from India4
- Figure 6: Most Important Institutional Attributes and Sub-Criteria for Indian Students When Applying to a U.S. Institution6
- Table 2: Comparison Between Students from China and India7
- Figure 7: Master’s Student Segments from the Middle East7
- Figure 8: Most Important Institutional Attributes and Sub-Criteria for Middle Eastern Students When Applying to a U.S. Institution.....9
- Figure 9: Master’s Student Segments from Latin America 10
- Figure 10: Most Important Institutional Attributes and Sub-Criteria for Latin American Students When Applying to a U.S. Institution 11
- Figure 11: Master’s Student Segments from Sub-Saharan Africa 12
- Figure 12: Most Important Institutional Attributes and Sub-Criteria for Sub-Saharan African Students When Applying to a U.S. Institution 13
- Figure 13: Master’s Student Segments from Europe 14
- Figure 14: Most Important Institutional Attributes and Sub-Criteria for European Students When Applying to a U.S. Institution 14

REFLECTIONS: BRIDGING RESEARCH AND PRACTICE TO ADVANCE INTERNATIONAL STUDENT SUCCESS

These two stories below are quite distant in terms of time and geography, but they share the same sentiment and implication for higher education institutions — that international student recruitment shouldn't just be about revenue.

- **"Time to Stop Milking the Cash Cow," October 22, 2007, The Age**
- **"U.S. Colleges Cash in on Foreign Students," March 25, 2015, CNBC**

In September 2008, when I joined WES, the global higher education sector was already feeling the heat of the recession with budget cuts. One clear trend was the increased pressure on institutions to recruit international students as a new revenue stream, however, they were also struggling with insights and strategies to achieve aggressive enrollment goals.

At WES, a non-profit with over 40 years of experience in credential evaluation services, we were witnessing this increasing pressure. In response, over the last seven years, we expanded the scope of our work and built a team that can undertake relevant, actionable and rigorous research related to international student enrollment and mobility trends.

In 2012, we developed a segmentation framework for empirically addressing the diversity of international students in terms of their academic preparedness and financial resources. Over the past four years, this framework has evolved to produce the following research:

- 2012: *Not All International Students Are the Same: Understanding Segments, Mapping Behavior* Launches the segmentation framework to understand the information-seeking behavior of prospective international students
- 2013: *Student Segmentation for an Effective International Enrollment Strategy* Expands previous research by providing segmentation by level of education and top three countries of origin
- 2014: *Bridging the Digital Divide: Segmenting and Recruiting International Millennial Students* Deepens the understanding of international Millennials' use of technology and the psychographic characteristics that influence their information-seeking behavior
- 2015 (new): *How Master's Students Choose Institutions: Research on International Student Segmentation* Describes how institutional characteristics influence the decision-making process for different segments of international master's students

In addition to our segmentation framework, we highlighted the importance of diversifying source countries in the article “Beyond More of the Same: The Top Four Emerging Markets for International Student Recruitment” (October 2012) and updated the research with a recent brief published in May 2015. We also established relationships with professional associations to undertake research that can improve recruitment practices in an evidence-driven manner. This included a commissioned research report entitled “Bridging the Gap: Recruitment and Retention to Improve International Student Experiences” (August 2014) for **NAFSA: Association of International Educators** and a joint research project called “Strategic Issues and Priorities for International Enrollment Management” with the **American Association of State Colleges and Universities**.

We believe that our research encourages higher education institutions to understand students beyond aggregate numbers and recognize the diversity of their needs and expectations. By providing these insights to institutions, we are helping them achieve their enrollment goals while advancing international student success.

The American higher education system has earned a world-wide reputation for being high quality and at the same time, being expensive. By only focusing on input metrics alone like recruitment targets and not as much on student success, American institutions are at risk of hurting their global reputation and competitive positioning. We have to ensure that American institutions offer value to international students by investing not only in effective recruitment strategies but also in these students’ academic success and campus experiences. The last thing American institutions want to be known for is treating international students as “cash cows.”

We welcome your ideas, suggestions and critique of our research so that we all can advance the success of international students. I also want to thank the overwhelming majority of our followers who agreed that **“WES research is impactful and helps me in my job”** (94% of 1,087 survey respondents). We look forward to your continued engagement and support.



Rahul Choudaha, Ph.D.

Chief Knowledge Officer and Senior Director of Strategic Development
World Education Services, New York

RAS@wes.org

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EXECUTIVE SUMMARY

This report shows how different segments of prospective international master's students make the crucial decision of which institutions to apply to and enroll at, by examining the following institutional attributes and characteristics:

Institutional Attributes

- School reputation
- Career prospects
- Location
- Cost

Institutional Characteristics

- Funding source (public versus private)
- Setting (city, suburb, town and rural)
- Size (large, medium and small)
- Basic Carnegie Classification

The following key takeaways highlight important differences between and within different segments, countries and regions:

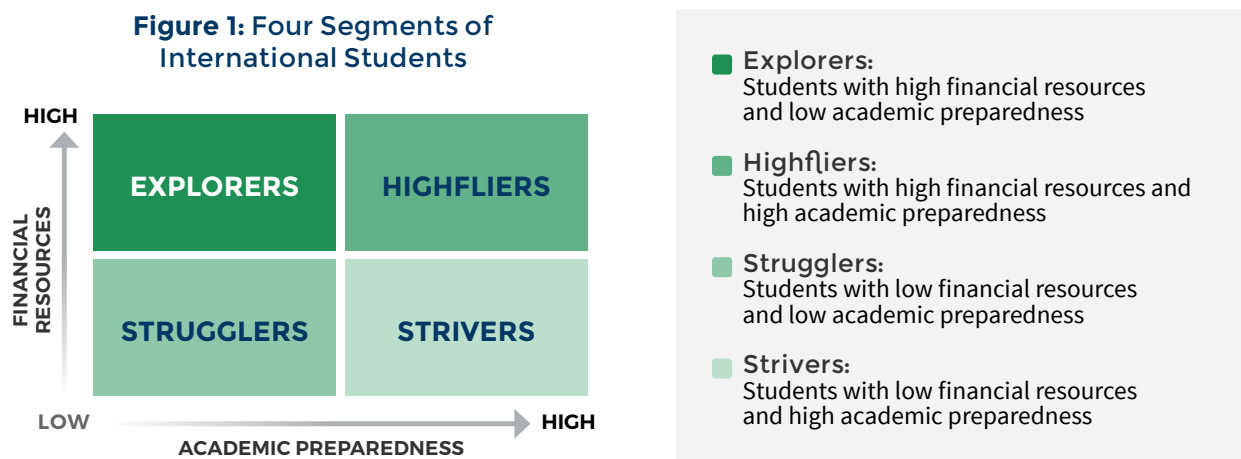
- Overall, career prospects are the most important factor international master's students value when considering where to apply and enroll.
- Chinese and Middle Eastern students are the only groups which value school reputation more than career prospects.
- Location is more important for students with high financial resources, such as Explorers and Highfliers.
- For students from Sub-Saharan Africa, cost is a critical factor, which is more important than school reputation.
- Indian students are more likely to apply to public institutions and are more willing to apply to institutions in towns or rural settings.
- European students are more willing to choose small, master's colleges and universities.

Building on the findings of this research, we recommend that institutions take the following actions to improve their international recruitment efforts:

- Understand and internalize the differences among student segments.
- Develop a deeper understanding of your institution's value proposition.
- Go from an ad hoc to an informed international recruitment strategy.

INTRODUCTION

During the 2013/14 academic year, there were 181,371 international students pursuing master’s degrees in the U.S.¹ This represents an increase of over 9% from the previous year. Despite the growing importance of international master’s students in the U.S., there is little research on how they decide which university to enroll at and what institutional attributes and characteristics inform these decisions. Building on our first report, *Not All International Students Are the Same: Understanding Segments, Mapping Behavior* (2012), this fourth report seeks to fill that research gap by focusing on the decision-making process of international students at the master’s level. Consistent with previous years’ reports, we define student segments as follows:



To address the question of what institutional attributes and characteristics different segments of international master’s students value in their decision-making process, WES surveyed 2,388 students applying to WES for credential evaluation (See **Methodology** for details). The report examines the relative importance that students place on the following institutional attributes: school reputation, career prospects, location, and cost. To delve deeper into what aspects of these attributes different student segments value, respondents were prompted to evaluate the importance of the following sub-criteria:

Table 1: Institutional Attributes and Sub-Criteria

School Reputation	Career Prospects	Location	Cost
Faculty research and expertise	Earning potential following graduation ³	Being close to friends or family that now live in the U.S.	Annual tuition and fees (before financial aid and scholarships) ⁴
Ranking of the school/program	Quality of career preparation services (e.g. opportunities to network with alumni or potential employers)	Being in or close to a major city	Availability of financial aid and scholarships awarded by institutions
Recommendations from peers ²	Reputation of school/program with potential employers	Being near a community of people from my home country	Cost of living
		Having fun things to do in the area	Duration of program ⁵

The report also maps student segments with the following institutional characteristics: Funding source (public versus private), setting (city, suburb, town and rural), size¹ (large, medium and small), and basic Carnegie Classification. The survey further prompted students to categorize the institutions to which they applied the following way:

Reach Schools²: One that you may not be qualified for, but there is still a possibility of acceptance.

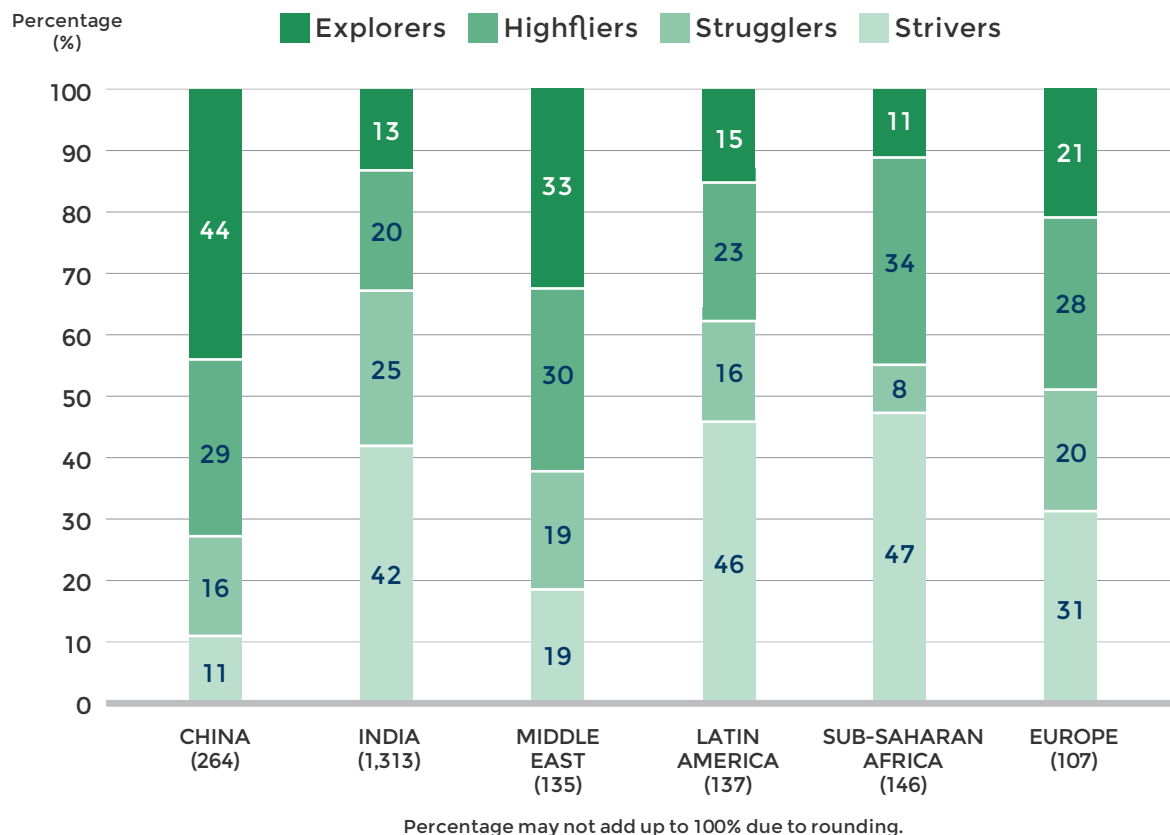
Match Schools: One matching your profile and most likely your best option.

Safety Schools: One you can be reasonably certain that you will be admitted to, but it is not your first choice.

These selections were then linked to institutional characteristics using data from the Integrated Postsecondary Education Data System (IPEDS) and the Carnegie Foundation.

The report finishes by exploring the differences in student decision-making processes as defined by segmentation and their country or region of origin, specifically: China, India, the Middle East, Latin America, Sub-Saharan Africa, and Europe. As over half of international graduate students in the U.S. are from China or India (54%),⁶ the report provides in-depth findings for these crucial markets but explores key differences by region as well.

Figure 2: Segmentation by Country/Region



1 According to Carnegie Foundation, size of the institutions is based on their full-time equivalent (FTE) enrollment and not on the basis of total enrollment: <http://bit.ly/1KudRrL>

2 Definitions of Reach, Match and Safety Schools are derived from Princeton Review: <http://bit.ly/1e4L5zm>

INTERNATIONAL STUDENT CHOICES BY COUNTRY AND REGION

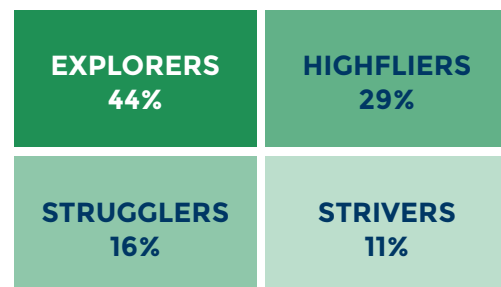
MASTER'S STUDENTS FROM CHINA

This section examines the institutional attributes and characteristics that prospective master's students from China value when selecting U.S. universities to apply to. Thirty-five percent of international graduate students studying in the U.S. are from China and that number is expected to keep growing.⁷ From the 2012/13 to 2013/14 academic year, the number of Chinese students pursuing graduate studies in the U.S. increased by 12%, double the growth rate of the world total (IIE).

Consistent with previous findings, the research found that Chinese students have stronger financial resources compared to their peers. Notable characteristics include:

- **Heavy concentration in segments with high financial resources.**
The survey revealed that over 70% of Chinese students are able to pay in excess of \$30,000 per year for their studies and 58% can afford over \$40,000.
- **Strong familial financial support for higher education.**
Only 16% of Chinese students consider their financial resources to be higher than their peers, indicating that these students consider education costs in excess of \$30,000 normal. Despite their ability to pay higher fees, about half of prospective Chinese students are applying without any professional work experience, suggesting significant financial support from families.

Figure 3: Master's Student Segments from China

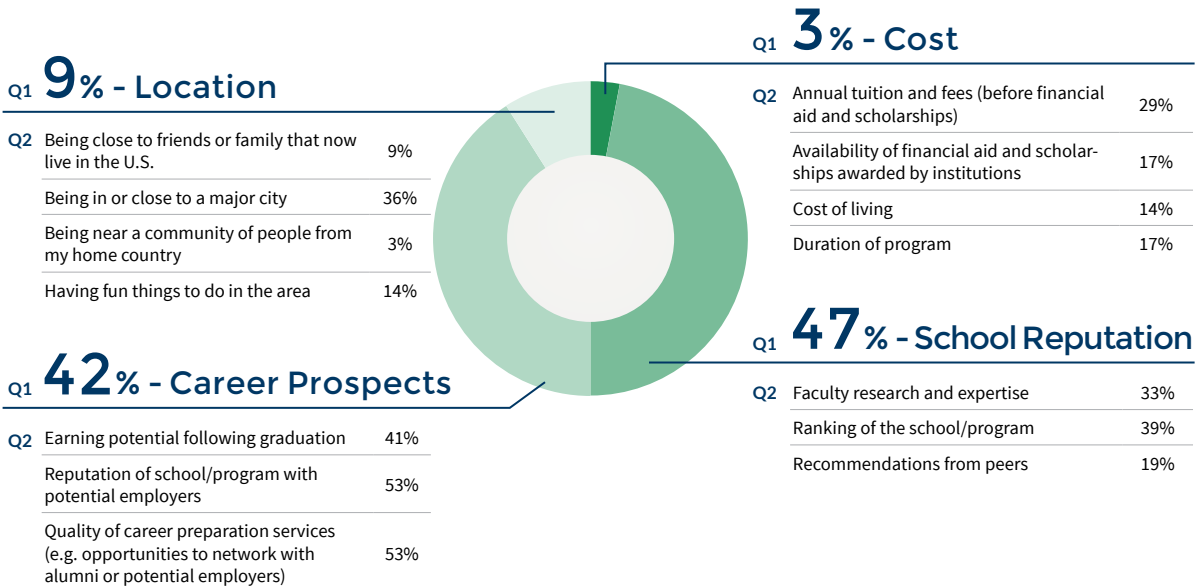


What do Chinese Master's Students Value in a University?

- **Reputation is critical for Chinese students.**
Forty-seven percent of Chinese students selected school reputation as the most important factor in their decision-making process. The ranking of the school/program is the most important sub-criterion of school reputation, with 39% selecting it as "very important," especially for Highfliers, with 49% selecting it as "very important."
- **Reputation also plays a role in career prospects.**
Forty-two percent of Chinese students selected career prospects as the most important attribute an institution can provide, with reputation of the school among potential employers as one of the most important sub-criteria. This suggests that reputation impacts many aspects of Chinese students' decision-making processes.

- **Cost is inconsequential.**
Only 3% of Chinese students selected cost as the most important factor in selecting a university. For Chinese Highfliers, the percentage is as low as 1%.
- **Strivers and Strugglers value scholarships and financial aid.**
Thirty-three percent of Strugglers and 20% of Strivers consider the availability of financial aid and scholarships “very important” compared to only 10% of Explorers.

Figure 4: Most Important Institutional Attributes and Sub-Criteria for Chinese Students When Applying to a U.S. Institution



Q1: Which of the following institutional attributes is most important to you when applying to a U.S. college/university?
Q2: How important are these sub-criteria to you when deciding if you should apply to a U.S. college/university?
 A: Percent of students for whom the specific sub-criterion is "very Important".

Where do Chinese Master’s Students Study?

Although location was selected by just 9% of Chinese respondents as the most important decision making factor in choosing an institution, their needs and values reflect important preferences in terms of where they study.

- **Chinese students tend to prefer private over public universities.**
The percentage of private universities they chose as ‘Reach Schools,’ ‘Match Schools,’ and ‘Safety Schools’ are 76%, 67%, and 62%, respectively.

- **The majority of Chinese students applied to Doctorate-granting Universities.¹**
Only 3% applied to Master’s Colleges and Universities² as Reach Schools and 8% did so as Match Schools.
- **Chinese students prefer a large campus setting.**
In term of campus size, 89% of Reach Schools and 85% of Match Schools Chinese students applied to are large.
- **Chinese students prefer major cities, especially students with higher financial resources.**
Being close to or in a major city is “very important” for 36% of Chinese students, however, less than 20% of Strivers or Strugglers indicate the same, highlighting differences by segment. Overall, more than 80% of schools Chinese students applied to are in a city setting.

“ Several schools I have applied to are doing a good job. They list all the important achievements they have obtained on the university website very clearly. And when you enter a specific school website, you can find out the names of some alumni who may be less important compared to the most successful ones but still are outstanding in the industry. ”

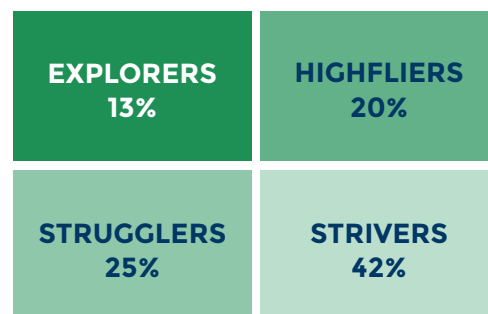
– Chinese Student,
Highflier

As 73% of Chinese respondents have high financial resources, many are able to overlook a limiting characteristic of international higher education, namely, affordability. As a result, they can afford to apply to schools that are traditionally more expensive and often focus on the reputation of an institution as its most attractive feature. Institutions wishing to recruit Chinese applicants should stress the quality of their programs, and highlight any national or international recognition they have received. Often, Chinese students place too great an emphasis on overall institutional rankings. As such, institutions should make an effort to educate prospective students about various dimensions of quality beyond ranking systems. Additionally, institutions should recognize the diversity of students within China, and ensure that their recruitment efforts align with the best-fit student segments within the country.

MASTER’S STUDENTS FROM INDIA

India is the second largest source of international students in U.S. higher education institutions. From the 2012/13 to 2013/14 academic year, graduate enrollment from India grew a healthy 12%, reversing a downward trend which saw Indian graduate enrollment decline by over 7% in the previous year (IIE). Consistent with national trends, the top two fields of study for Indian students are engineering (42%) and math and computer science (32%).

Figure 5: Master’s Student Segments from India



1 Doctorate-granting Universities include: Research Universities (very high research activity), Research Universities (high research activity) and Doctoral/Research Universities.

2 Master’s Colleges and Universities include: Master’s Colleges and Universities (larger programs), Master’s Colleges and Universities (medium programs) and Master’s Colleges and Universities (smaller programs).

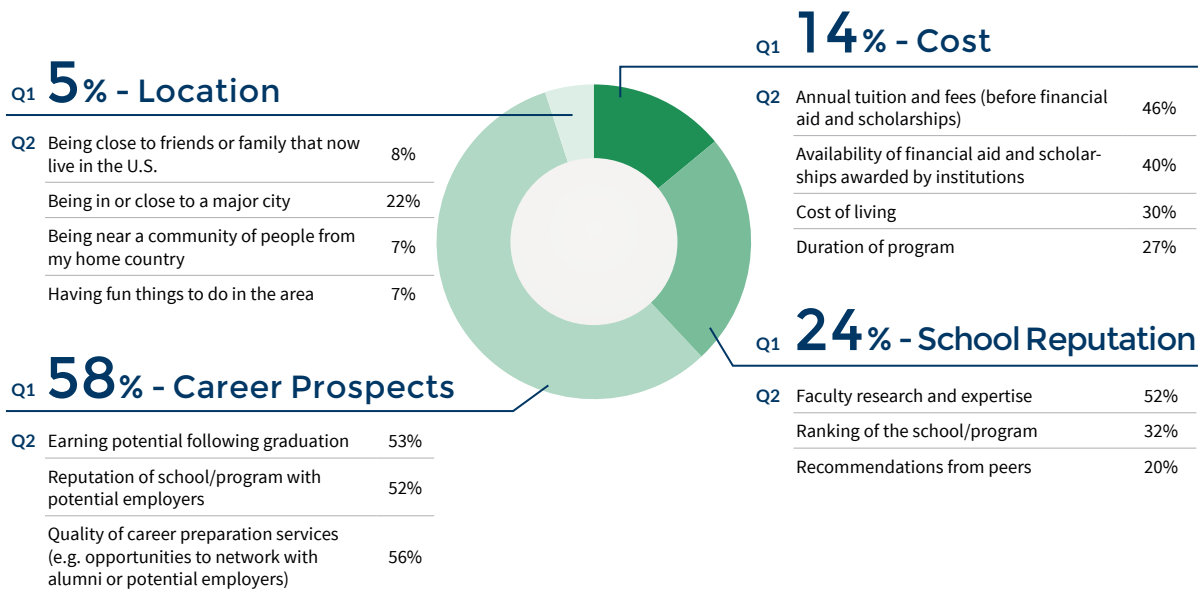
In contrast to their Chinese peers, Indian students are more concentrated in student segments with low financial resources. These differences affect the values, motivations, and needs of Indian students. Notable characteristics include:

- **High concentration of Strivers and Strugglers.**
Sixty-seven percent of Indian respondents are Strivers or Strugglers.
- **Less financial resources than Chinese peers.**
Nearly 70% of Indian students have a budget of less than \$30,000 per year.

What do Indian Master's Students Value in a University?

- **Indian students expect a good return on investment on their U.S. education.**
Career prospects are the most important (58%) characteristic of a school, more than the sum of school reputation (24%), cost (14%), and location (5%).
- **Strivers are the most concerned with career prospects.**
Approximately 60% of Strivers rated the three sub-criteria of career prospects (reputation with prospective employers, earning potential, and career services) as “very important.”
- **Shorter programs offer a good value for Indian students.**
Twenty-seven percent of Indian students rated program duration as “very important.”
- **Scholarships offers go a long way in attracting Indian students, but not for all segments.**
Forty percent of Indian applicants indicated that the availability of financial aid and scholarships is “very important” but only one quarter of Explorers indicated so.
- **Faculty research is the most important component of school reputation, especially for Strivers.**
Fifty-two percent of Indian students and 59% of Strivers consider faculty research “very important.”

Figure 6: Most Important Institutional Attributes and Sub-Criteria for Indian Students When Applying to a U.S. Institution



Q1: Which of the following institutional attributes is most important to you when applying to a U.S. college/university?
Q2: How important are these sub-criteria to you when deciding if you should apply to a U.S. college/university?
A: Percent of students for whom the specific sub-criterion is "very Important".

Where do Indian Master's Students Study?

- **Indian students are more likely to apply to public over private institutions.**
For each of their school preferences (Reach Schools, Match Schools, and Safety Schools), approximately 70% are public. They are the only country or region with more students choosing public institutions as Reach Schools.
- **Indian students are more likely than their Chinese counterpart to apply to Master's Colleges and Universities.**
Twenty-eight percent of Indian students applying to Reach Schools and 42% applying to Match Schools apply to Master's Colleges and Universities, more than any other country or region.
- **Indian students are willing to compromise on location.**
Seventeen percent of Indian students applying to Match Schools and Safety Schools apply to schools located in a town or rural setting.



By far the best strategy that made me consider certain schools is the prevalence of Financial Aid offers... Financial factors attract the student community to a greater extent.



– Indian Student,
Striver

Institutions that are affordable, offer scholarships, or have shorter degree programs should consider expanding their recruitment efforts to India, with a particular focus on recruiting Strivers, the largest segment of Indian master's students. Sixty-two percent of Indian respondents are highly prepared academically and are often qualified to receive merit-based scholarships or funding opportunities. Higher education institutions (HEIs) with high quality programs, particularly in STEM fields that are looking to increase their enrollment of academically prepared students should consider India as a target market. However, institutions should be aware of the shifting profile of Indian students. While India will continue to have a strong base of Strivers, the **emergence of Highfliers**⁸ will open the doors to institutions with a great reputation but limited scholarship opportunities.

Table 2: Comparison Between Students from China and India

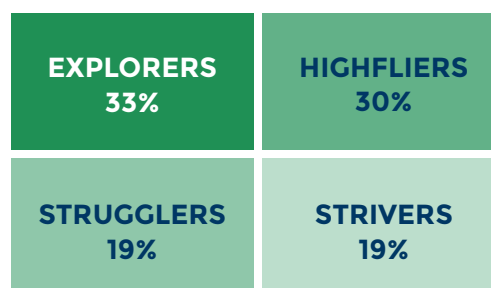
	China	India
Who are they?	Explorers (44%), Highfliers (29%), Strugglers (16%) and Strivers (11%)	Strivers (42%), Strugglers (25%), Highfliers (20%) and Explorers (13%)
	More than 70% can afford over \$30,000	Nearly 70% have a budget below \$30,000
	Study Business, Math and Computer Science, Education	Study Engineering, Math and Computer Science
What do they value?	School reputation	Career prospects
	Location	Cost
Where do they go?	Private not-for-profit	Public
	Large, Doctorate-granting Universities	More likely to apply to medium-size, Master's Colleges and Universities
	City	More likely to apply to institutions in town or rural location

MASTER'S STUDENT FROM THE MIDDLE EAST

In the 2013/14 academic year, the number of graduate students from the Middle East increased by 15%. Although the trend has been broadly positive across the region, growth rates differ dramatically by source country. While the number of students from Jordan decreased by 5%, inbound mobility from Iraq, Oman, and Saudi Arabia increased 42%, 30%, and 18%, respectively (IIE). Similar to national trends, the top fields of study among students from the Middle East are engineering (23%), business (23%) and health professions (16%).

Overall, prospective Middle Eastern students are heavily concentrated in student segments with high financial resources; however, there are major differences in financial resources by segment.

Figure 7: Master's Student Segments from the Middle East



- **There is a large disparity in financial resources between Middle Eastern Highfliers and Strivers.**

Fifty-seven percent of Highfliers from the Middle East have a budget of over \$50,000 per year, compared to 16% of Strivers from the same region exemplifying the varied financial backgrounds of students from the Middle East.

- **They are often less academically prepared.**

Only 38% of Middle Eastern master's students consider their academic ability to be higher than their peers, implying a lack of confidence in their academic preparedness for entering a U.S. institution. This is most likely due to a lack of English language preparedness, especially for students from Saudi Arabia and Kuwait.⁹

What do Middle Eastern Master's Students Value in a University?

- **Middle Eastern students place the highest value on location compared to other countries and regions.**

Consistent with previous reports' findings for Explorers, location is chosen as the most important factor by 24% of students from the Middle East and 32% of Explorers. No other country or region selected this option more than 10% of the time.

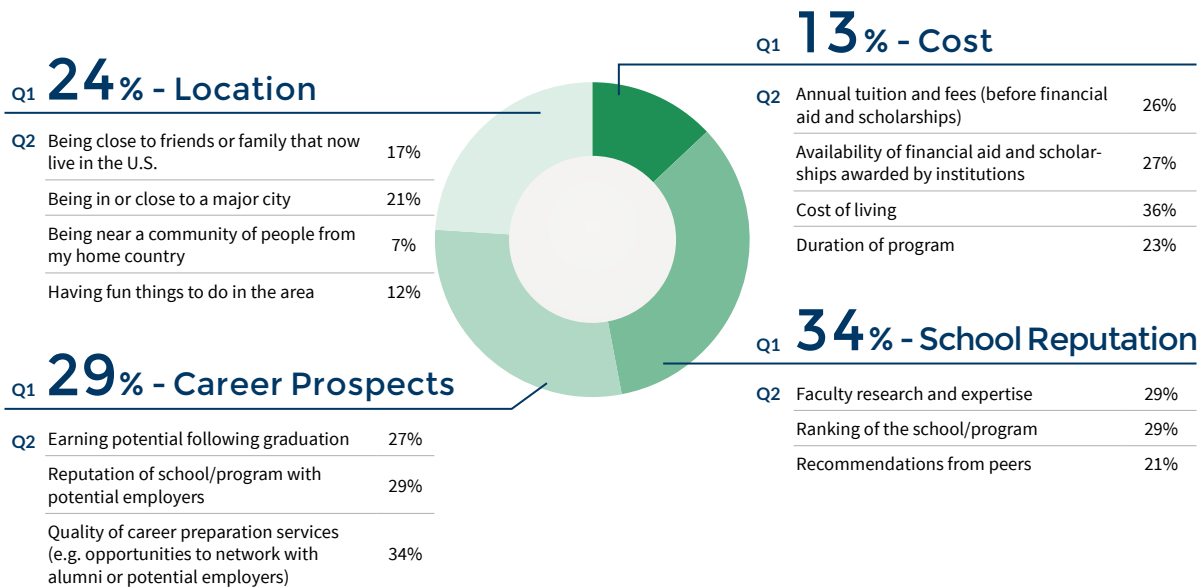
- **Having a strong support network nearby is important, especially for Strugglers.**

Being close to friends or family that live in the U.S. is more important to Middle Eastern students than other countries and regions. Overall, 17% of students from the region consider this sub-criterion as "very important;" almost a quarter (23%) of Strugglers from the region rate cultural and familial proximity as "very important."

- **Cost of living matters!**

Despite the fact that many students from the Middle East rate other measures related to cost low in terms of importance to the application process, 36% of them described cost of living as "very important." This is likely because many of them have their tuition fully covered by government scholarship such as KASP¹⁰, while cost of living is not.

Figure 8: Most Important Institutional Attributes and Sub-Criteria for Middle Eastern Students When Applying to a U.S. Institution



Q1: Which of the following institutional attributes is most important to you when applying to a U.S. college/university?
Q2: How important are these sub-criteria to you when deciding if you should apply to a U.S. college/university?
 A: Percent of students for whom the specific sub-criterion is "very Important".

Where do Middle Eastern Master's Students Study?

- **Middle Eastern students are the most likely to apply to schools in suburban settings.**
One quarter of the Match Schools that Middle Eastern students apply to are in suburbs, the highest of any country or region.
- **Most likely to apply to medium-size schools.**
Nearly half of the Safety Schools and 38% of the Match Schools that Middle Eastern students apply to are medium-sized in terms of full-time enrollment. If current trends persist, the

“ The school answered all of my questions precisely and politely and I could plan more easily for my future. Living alone in a foreign country is not easy so having all the necessary information about the university, professors, country and other important things is very crucial. ”

– Iranian Student,
Highflier

Middle East will grow in importance as a source for international students. This is promising for institutions that want to increase their enrollment of international masters' students, but may not have the resources to offer attractive scholarships. Moreover, location preferences indicate that students from the Middle East place a high value on proximity to friends and families, meaning that recruiting from the Middle East will pay dividends as current students become an attractive component of the educational experiences of future cohorts. It is important to remember that many Middle Eastern students place a high value on the cost of living and exhibit an affinity for suburbs. This provides excellent opportunities for institutions located outside of expensive metropolitan areas.

MASTER'S STUDENTS FROM LATIN AMERICA

In the 2013/14 academic year, the number of international students from Latin America increased by 10% at the undergraduate level but remained constant at the graduate level (IIE). Although Latin American students enroll in the U.S. primarily for undergraduate degrees, an increase in undergraduate enrollment may be predictive of future growth at the graduate level.

Students from Latin America are highly concentrated in segments with strong academic preparation, but may lack the financial resources to study in more expensive programs. Like Indian students, they are heavily concentrated in the Striver category. Findings on Latin American students strongly reflect previous reports' findings on Strivers.

Figure 9: Master's Student Segments from Latin America

EXPLORERS 15%	HIGHFLIERS 23%
STRUGGLERS 16%	STRIVERS 46%

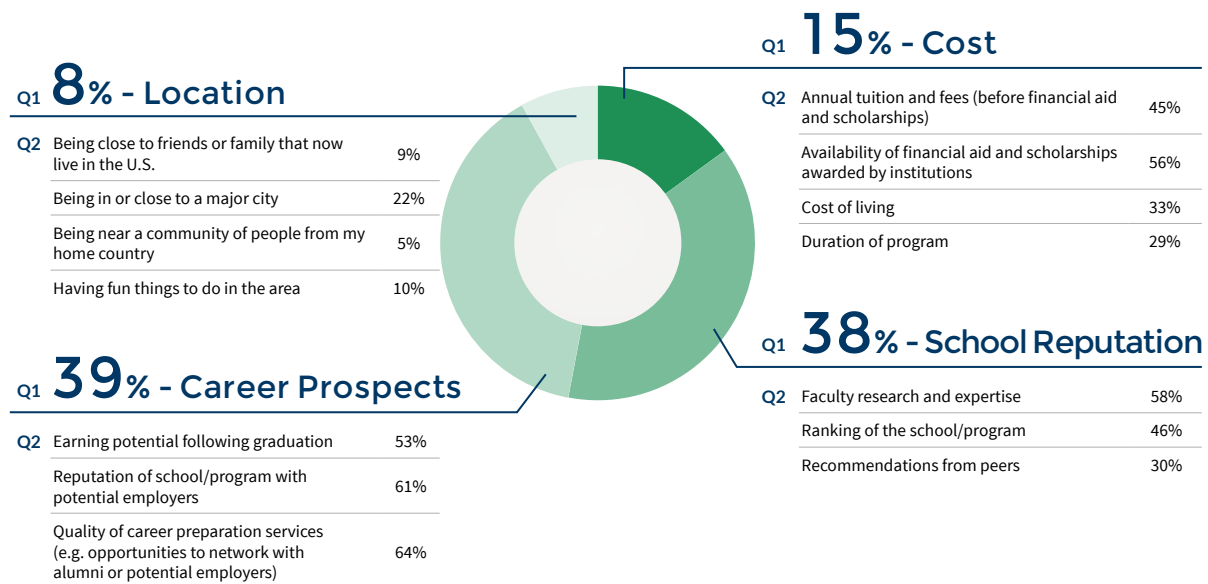
- **Affordability is crucial for many Latin American students.**

Nearly 70% of Latin American respondents indicated that their budget for studying is \$30,000 or less and 45% cited cost of annual tuition and fees (before financial aid and scholarships) as “very important.” Not surprisingly, 56% of Latin Americans students rated availability of financial aid and scholarships as “very important.”

What do Latin American Master's Students Value in a University?

- **Career prospects drive Latin American applications.**
Similar to Indian students and consistent with Strivers in general, over 50% of respondents from Latin America rated all three sub-criteria of career prospects (reputation with prospective employers, earning potential and career services) as “very important.”
- **Feedback from peers influences Latin American students' understanding of school reputation.**
Latin American students are the most likely to take recommendations from peers into serious consideration as nearly one third (30%) rated this criterion as “very important.”

Figure 10: Most Important Institutional Attributes and Sub-Criteria for Latin American Students When Applying to a U.S. Institution



Q1: Which of the following institutional attributes is most important to you when applying to a U.S. college/university?
Q2: How important are these sub-criteria to you when deciding if you should apply to a U.S. college/university?
A: Percent of students for whom the specific sub-criterion is "very Important".

Where do Latin American Master's Students Study?

- Latin American students have a strong preference for cities.**
 Although just 22% of Latin American students chose "being in or close to a major city" as "very important" over three quarters of Reach Schools, Match Schools, and Safety Schools that Latin American students apply to are in cities, indicating a strong preference for metropolitan areas.
- Small institutions are often Safety School choices.**
 Latin American students tend to apply to large institutions as Reach Schools. However, they are the most likely to apply to small institutions as Safety Schools (14%).

“ The school awards scholarships to international students. This gave me the opportunity to get this kind of education; otherwise it would not be possible for me. ”

– **Colombian Student,**
Striver

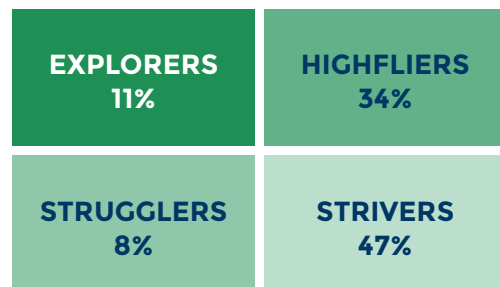
Latin American students are heavily concentrated in the Striver segment of international students. This consideration is important to keep in mind for institutions that are comparatively affordable or generous with international student scholarships. Institutions capable of offering financial assistance could reap the benefits of the diversity and academic acumen Latin American students bring to campus by leveraging their preference and trust of peers through low cost and effective recruitment strategies such as international student ambassador programs.

MASTER'S STUDENTS FROM SUB-SAHARAN AFRICA

In the 2013/14 academic year, the percentage of international graduate students from Sub-Saharan Africa decreased by 1% from the previous year; however, growth rates differ by sub-region. Graduate enrollment from West Africa grew a healthy 4% in 2013/14, while Central African graduate enrollment decreased by 11% (IIE).

As is the case among Latin American students, enrollment from Sub-Saharan Africa is dominated by Strivers (47%) and Highfliers (34%) indicating very strong academic preparedness from the region.

Figure 11: Master's Student Segments from Sub-Saharan Africa

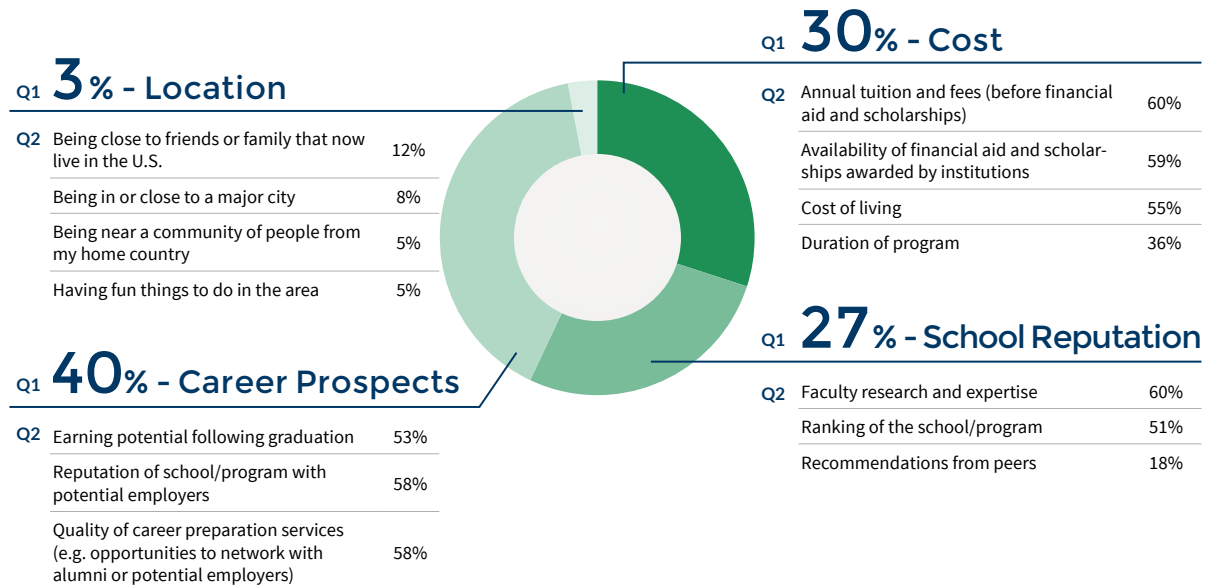


- **Overall, students from Sub-Saharan Africa have a restrictive budget for their studies.** Fifty-four percent of students from Sub-Saharan Africa have a budget of less than \$20,000 per year and are the most likely to think every aspect of cost is “very important,” compared to students from other countries or regions.

What do Master’s Students from Sub-Saharan Africa Value in a University?

- **Students from Sub-Saharan Africa come to improve their career opportunities.** Forty percent of students from Sub-Saharan Africa cited career prospects as the most important factor in choosing an institution, more than any other option.
- **Student segments differ by what they value in career opportunities.** Fifty-eight percent of Sub-Saharan Strivers consider earning potential after graduation to be “very important” compared to only 31% of Explorers. In contrast, 67% of Highfliers consider the quality of career preparation services to be “very important” while only 38% of Explorers expressed the same sentiment.
- **Location of institution is minimally important.** Only 3% selected location as the most important institutional attribute. Moreover, only 8% of students consider being in or close proximity to a major city as “very important,” much lower than how students from other countries and regions rated this sub-criterion (around 20%).

Figure 12: Most Important Institutional Attributes and Sub-Criteria for Sub-Saharan African Students When Applying to a U.S. Institution



Q1: Which of the following institutional attributes is most important to you when applying to a U.S. college/university?
Q2: How important are these sub-criteria to you when deciding if you should apply to a U.S. college/university?
 A: Percent of students for whom the specific sub-criterion is "very Important".

Where do Master's Students from Sub-Saharan Africa Students Study?

- **Students from Sub-Saharan Africa are more likely to apply to public institutions**
About 60% of the Match Schools and Safety Schools that students from Sub-Saharan Africa apply to are public.
- **Master's Colleges and Universities are often a good fit.**
Approximately 30% of the institutions that Sub-Saharan African students identified as Match Schools are Master's Colleges and Universities.

“ The school provides a strong research base for Computer Information Systems which is very crucial to my own individual career development. ”

– Nigerian Student,
Striver

Students from Sub-Saharan Africa are an excellent fit for institutions looking to recruit from a diverse pool of qualified applicants. These students often have lower financial resources, which puts more affordable institutions or those offering scholarships to international students at a huge advantage. Institutions should note the large diversity of students within Africa when determining the best methods, locations and segments to recruit from. While outbound mobility is increasing in certain regions, it is also decreasing in others.

MASTER'S STUDENTS FROM EUROPE

This section details survey findings for Europe, the most diverse region in terms of student segments. The number of European graduate students decreased in the 2013/14 academic year by approximately 4% from the previous year (IIE). Reflecting the continent's diverse composition, each of the four segments identified by WES includes at least 20% of all students from the region, highlighting a relatively even distribution of profiles.

What do European Master's Students Value in a University?

- European students come to improve their career prospects.**
 Forty percent of European students select career prospects as the most important factor in applying to an institution, the most important component of which is the quality of career preparation services, which 51% consider "very important."
- Competitive tuition matters.**
 Although only 17% of European students selected cost as the most important institutional variable, 41% indicated that tuition and fees (prior to financial aid and scholarships) is "very important." This aligns with the finding that 48% of European students' budget are less than \$20,000 per year.

Figure 13: Master's Student Segments from Europe

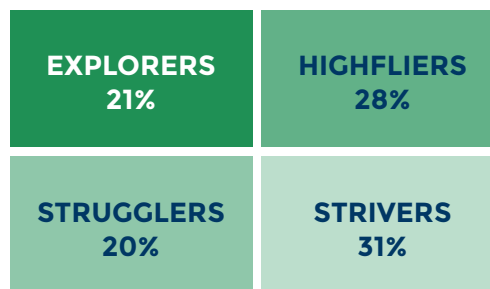
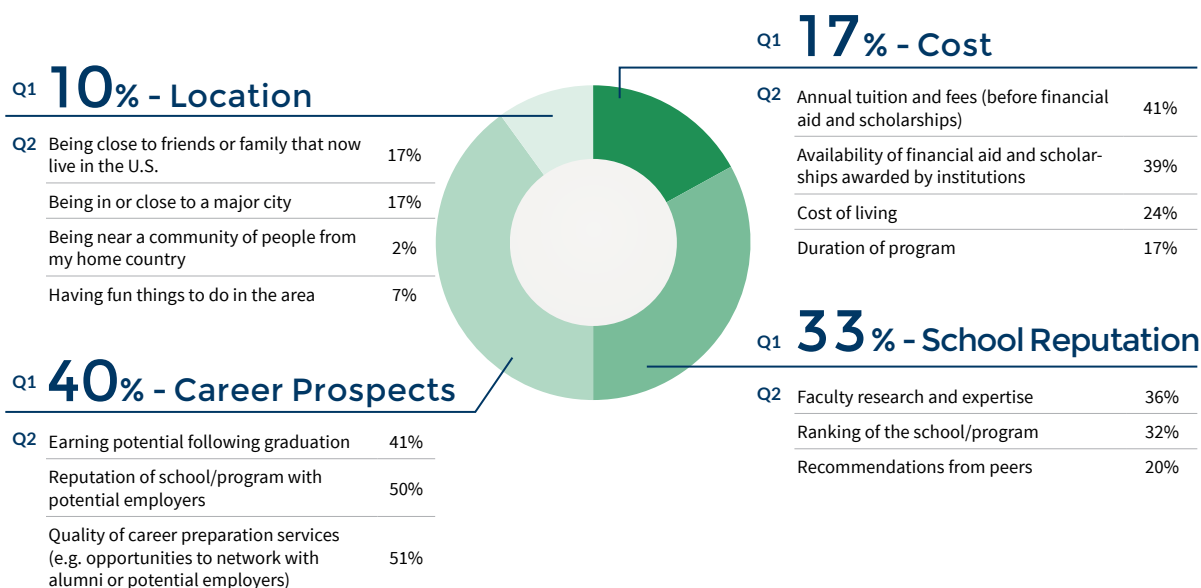


Figure 14: Most Important Institutional Attributes and Sub-Criteria for European Students When Applying to a U.S. Institution



Q1: Which of the following institutional attributes is most important to you when applying to a U.S. college/university?
Q2: How important are these sub-criteria to you when deciding if you should apply to a U.S. college/university?
 A: Percent of students for whom the specific sub-criterion is "very important".

Where do European Master's Students Study?

- **Despite financial constraints, European students seem to prefer private over public institutions.**

About 60% of the schools that Europeans applied to are private, regardless of whether they are Reach, Match or Safety Schools.

- **There is a diversity of preferences in terms of Carnegie Classification.**

The percentage of European students applying to a Master's Colleges or University increased from Reach School (15%) to Match School (26%) to Safety School (46%). Notably, European respondents apply to very few institutions (67% applied to 1-3), indicating a strong preference for particular universities.



In my case the school was selected by my sponsor - my employer. So the strategy of the schools working with employers who are interested to advance the knowledge of their employees seems to me a good strategy.



– **Georgian Student,**
Highflier

Despite the diversity of student segments in Europe, it is possible for institutions to form Europe-specific international recruitment strategies. As the majority of international students from Europe are forgoing a free or heavily subsidized education to study in the U.S., a return on investment in terms of employability is a huge driver, particularly as many European countries face a challenging economic environment. Institutions wishing to recruit students from Europe should highlight not only the career opportunities for graduates but also opportunities for career development or internships.

CONCLUSIONS AND RECOMMENDATIONS

The research revealed that prospective international master's students are attracted by a wide range of characteristics, features, and attributes of institutions. It also found differences between countries and regions, across student segments, and within countries and regions. Although well-known institutions have a large advantage in terms of maintaining and growing their international enrollment funnel, lesser-known institutions with a good understanding of their target demographic have ample opportunities to market their value proposition in a targeted and informed manner.

Based on our research findings, we recommend the following:

Understand and internalize the differences among student segments.

The research illustrates that there are a wide range of student motivations, needs, and preferences within and among sending countries and regions. These differences have direct implications in terms of which institutions students choose to apply to and enroll in. Institutions need to be aware of how these differences manifest themselves and to align their outreach strategies with the appropriate target market.

Develop a deeper understanding of your institution's value proposition.

There are over 4,000 HEIs in the U.S., and each is unique in its own way. Although there is little that institutions can do to increase their ranking, improve their location, or alter other immutable characteristics, they should determine what makes them an attractive place to study. Institutions should use these advantages to attract best-fit international students. Whether this means leveraging scholarships more effectively or highlighting a desirable location, students have different needs, and institutions must align their value propositions to meet them.

Go from an ad hoc to an informed international recruitment strategy.

It is imperative that institutions develop an understanding of their target market and of their own strengths and weaknesses. However, doing so in an ad hoc manner and simply hoping for the best results is unlikely to help institutions meet their international enrollment targets. Institutions need to move from hunches to informed strategies in order to achieve the best results.

The report demonstrates not only the breadth of student profiles, but also the diverse attributes and characteristics that attract students to particular institutions. In a climate where only a few institutions enroll the lion's share of international students, the challenge for HEIs is to build awareness and attract and retain the best-fit international master's students to their campuses. We hope that this research will help advance this goal by providing institutions of various types with the information they need to build and implement informed strategies.

METHODOLOGY

The findings of this report are based on an online survey to applicants for foreign credential evaluation at World Education Services (www.wes.org) administered from May 4th-18th, 2015.

In total, 3,472 questionnaires were completed for a response rate of 23%. An incentive of \$200 Amazon.com gift card prize was offered. Analysis includes only master's degree-seeking international students (neither a U.S. citizen nor permanent resident), who numbered 2,388 completed responses. The respondents' quotes are paraphrased and spelling and grammatical errors were amended. See table in the Appendix where findings with "-" indicate those failing the significance test; otherwise, findings are statistically significant with a p-value under 0.05, which means there is only a 5% probability of these findings occurring by chance alone. Percentages may not sum up to 100% due to rounding.

Academic Preparedness

Respondents were asked to indicate their level of agreement with the following statements: "I feel academically prepared to enter a U.S. college/university" and "I expect that my English skills will be as good as fellow students at my future college/university." We assigned the responses numeric values, i.e. "strongly agree" 5, "agree" 4, "neither agree nor disagree" 3, "disagree" 2, and "strongly disagree" 1; we then averaged these two values as raw academic preparedness scores. We coded responses with scores below the median as low academic ability and the rest as high academic ability.

Financial Resources

Respondents were asked to list two primary funding sources for their studies in the U.S., i.e., "Financial support from family or friends," "Personal savings," "Financial aid from colleges / universities in North America (Merit-based scholarships, Teaching assistance, etc.)," "Grants or scholarships from external sources (government, NGO, employer, etc.)," or "Loan." We coded respondents as having high financial resources if the response was either one of the following combinations: "Personal savings" only, "Financial support from family or friends" only, "Personal savings" and "Financial support from family or friends" only, or "Grants or scholarships from external sources" only. We coded all other responses as low financial resources.

Institutional Choices

Respondents were asked to list one institution they applied to for each of the school types: Reach School, Match School and Safety School. We used Integrated Postsecondary Education Data System (IPEDS) to identify the institutional characteristics (e.g. funding sources, size, setting, and Basic Carnegie Classification).

Limitations

The survey sample is restricted to individuals that applied for a WES credential evaluation with the intention of pursuing higher education in the U.S. This may result in self-selection and sample biases.

APPENDIX

	Explorer	Highflier	Striver	Struggler	Overall	China	India	Middle East	Latin America	Sub-Saharan Africa	Europe
Total Responses	460	550	847	531	2388	264	1313	135	137	146	107
Segmentation											
Explorer	100%	0%	0%	0%	19%	44%	13%	33%	15%	11%	21%
Highflier	0%	100%	0%	0%	23%	29%	20%	30%	23%	34%	28%
Striver	0%	0%	100%	0%	35%	11%	42%	19%	46%	47%	31%
Struggler	0%	0%	0%	100%	22%	16%	25%	19%	16%	8%	20%
Which of the following institutional factors is most important to you when applying to a U.S. college/university?											
School reputation	35%	32%	27%	27%	30%	47%	24%	34%	38%	27%	33%
Career prospects	46%	44%	50%	53%	48%	42%	58%	29%	39%	40%	40%
Location	9%	11%	4%	5%	7%	9%	5%	24%	8%	3%	10%
Cost	9%	13%	18%	15%	15%	3%	14%	13%	15%	30%	17%
In terms of school reputation, how important are these aspects to you when deciding if you should apply to a U.S. college/university?											
- Recommendations from peers											
Not important	3%	2%	2%	2%	2%	1%	2%	1%	1%	3%	4%
Slightly important	12%	11%	7%	17%	11%	13%	11%	10%	7%	13%	13%
Moderately important	28%	25%	22%	27%	25%	25%	23%	25%	23%	31%	24%
Important	41%	41%	45%	38%	42%	42%	44%	41%	38%	35%	39%
Very important	15%	21%	23%	16%	20%	19%	20%	21%	30%	18%	20%
In terms of school reputation, how important are these aspects to you when deciding if you should apply to a U.S. college/university?											
- Faculty research and expertise											
Not important	1%	1%	1%	1%	1%	1%	1%	2%	1%	0%	5%
Slightly important	8%	4%	2%	4%	4%	5%	3%	16%	3%	2%	7%
Moderately important	17%	14%	11%	15%	14%	19%	13%	19%	10%	10%	11%
Important	40%	33%	30%	40%	35%	43%	32%	34%	27%	29%	42%
Very important	35%	48%	57%	40%	47%	33%	52%	29%	58%	60%	36%
In terms of school reputation, how important are these aspects to you when deciding if you should apply to a U.S. college/university?											
- Ranking of the school/program											
Not important	1%	1%	1%	1%	1%	0%	1%	4%	0%	1%	3%
Slightly important	8%	4%	4%	8%	5%	5%	6%	11%	4%	3%	5%
Moderately important	21%	16%	17%	24%	19%	16%	19%	21%	18%	17%	17%
Important	41%	38%	41%	40%	40%	40%	42%	36%	32%	28%	44%
Very important	29%	40%	37%	28%	34%	39%	32%	29%	46%	51%	32%
In terms of cost, how important are these aspects to you when deciding if you should apply to a U.S. college/university?											
- Annual tuition and fees (before financial aid and scholarships)											
Not important	3%	3%	1%	1%	2%	1%	0%	21%	1%	1%	2%
Slightly important	5%	5%	2%	4%	4%	6%	3%	7%	1%	3%	7%
Moderately important	22%	14%	10%	12%	14%	28%	11%	18%	12%	12%	11%
Important	37%	37%	33%	43%	37%	37%	39%	27%	40%	24%	38%
Very important	32%	42%	54%	40%	44%	29%	46%	26%	45%	60%	41%
In terms of cost, how important are these aspects to you when deciding if you should apply to a U.S. college/university?											
- Cost of living											
Not important	3%	3%	2%	2%	3%	2%	1%	4%	7%	1%	7%
Slightly important	10%	6%	5%	6%	6%	12%	5%	9%	5%	3%	11%
Moderately important	26%	19%	19%	24%	21%	35%	21%	11%	20%	10%	26%
Important	41%	41%	39%	40%	40%	36%	43%	41%	35%	31%	31%
Very important	20%	31%	35%	29%	30%	14%	30%	36%	33%	55%	24%
In terms of cost, how important are these aspects to you when deciding if you should apply to a U.S. college/university?											
- Availability of financial aid and scholarships awarded by institutions											
Not important	8%	6%	1%	3%	4%	6%	1%	28%	2%	3%	7%
Slightly important	14%	11%	3%	5%	7%	20%	5%	8%	5%	4%	9%
Moderately important	25%	21%	14%	16%	18%	32%	17%	10%	16%	15%	19%
Important	31%	28%	31%	33%	31%	25%	36%	27%	20%	19%	26%
Very important	23%	34%	51%	43%	40%	17%	40%	27%	56%	59%	39%

	Explorer	Highflier	Striver	Struggler	Overall	China	India	Middle East	Latin America	Sub-Saharan Africa	Europe
Total Responses	460	550	847	531	2388	264	1313	135	137	146	107
In terms of cost, how important are these aspects to you when deciding if you should apply to a U.S. college/university? - Duration of program											
Not important	3%	3%	4%	2%	3%	3%	2%	10%	5%	2%	3%
Slightly important	8%	6%	7%	7%	7%	7%	6%	9%	7%	8%	10%
Moderately important	21%	21%	18%	23%	20%	24%	20%	24%	23%	13%	18%
Important	47%	41%	43%	49%	44%	48%	46%	34%	36%	42%	52%
Very important	21%	30%	28%	19%	25%	17%	27%	23%	29%	36%	17%
In terms of location, how important are these aspects to you when deciding if you should apply to a U.S. college/university? - Being close to friends or family that now live in the U.S.											
Not important	26%	29%	32%	25%	28%	33%	25%	29%	43%	30%	42%
Slightly important	22%	22%	18%	23%	21%	25%	21%	21%	18%	20%	21%
Moderately important	23%	21%	24%	25%	24%	20%	27%	17%	17%	20%	10%
Important	17%	16%	17%	19%	17%	13%	19%	16%	12%	18%	10%
Very important	12%	12%	9%	7%	10%	9%	8%	17%	9%	12%	17%
In terms of location, how important are these aspects to you when deciding if you should apply to a U.S. college/university? - Being near a community of people from my home country											
Not important	24%	33%	33%	27%	30%	33%	23%	28%	56%	36%	64%
Slightly important	23%	27%	20%	24%	23%	32%	22%	23%	20%	23%	21%
Moderately important	26%	19%	23%	28%	24%	21%	28%	19%	10%	21%	11%
Important	22%	15%	16%	17%	17%	10%	20%	24%	9%	15%	2%
Very important	5%	6%	8%	4%	6%	3%	7%	7%	5%	5%	2%
In terms of location, how important are these aspects to you when deciding if you should apply to a U.S. college/university? - Being in or close to a major city											
Not important	5%	8%	9%	5%	7%	2%	6%	8%	9%	19%	8%
Slightly important	13%	9%	10%	11%	10%	11%	8%	7%	11%	18%	16%
Moderately important	23%	24%	22%	27%	24%	14%	23%	26%	27%	31%	24%
Important	38%	34%	36%	40%	37%	37%	41%	37%	31%	23%	35%
Very important	21%	25%	22%	17%	21%	36%	22%	21%	22%	8%	17%
In terms of location, how important are these aspects to you when deciding if you should apply to a U.S. college/university? - Having fun things to do in the area											
Not important	15%	18%	15%	15%	16%	15%	15%	12%	18%	22%	20%
Slightly important	20%	19%	21%	25%	21%	23%	22%	12%	17%	23%	18%
Moderately important	31%	29%	32%	33%	31%	25%	33%	30%	27%	33%	29%
Important	25%	24%	23%	22%	24%	22%	23%	34%	28%	17%	27%
Very important	8%	9%	9%	6%	8%	14%	7%	12%	10%	5%	7%
In terms of career prospects, how important are these aspects to you when deciding if you should apply to a U.S. college/university? - Reputation of school/program with potential employers											
Not important	0%	1%	0%	1%	0%	0%	0%	3%	0%	0%	0%
Slightly important	3%	1%	1%	3%	2%	1%	1%	5%	1%	2%	3%
Moderately important	13%	8%	7%	10%	9%	10%	8%	18%	7%	8%	6%
Important	43%	36%	34%	44%	38%	35%	39%	45%	31%	32%	41%
Very important	41%	55%	58%	42%	51%	53%	52%	29%	61%	58%	50%
In terms of career prospects, how important are these aspects to you when deciding if you should apply to a U.S. college/university? - Earning potential following graduation											
Not important	1%	1%	0%	1%	1%	2%	1%	0%	0%	1%	0%
Slightly important	5%	3%	1%	4%	3%	5%	3%	10%	2%	1%	2%
Moderately important	16%	11%	9%	8%	11%	16%	8%	16%	11%	14%	13%
Important	38%	34%	34%	44%	37%	36%	36%	47%	34%	31%	44%
Very important	39%	52%	56%	42%	49%	41%	53%	27%	53%	53%	41%
In terms of career prospects, how important are these aspects to you when deciding if you should apply to a U.S. college/university? - Quality of career preparation services (e.g. opportunities to network with alumni or potential employers)											
Not important	0%	1%	0%	1%	1%	0%	0%	2%	0%	0%	1%
Slightly important	3%	1%	1%	2%	2%	1%	1%	7%	1%	1%	6%
Moderately important	15%	9%	7%	9%	10%	10%	8%	17%	8%	10%	11%
Important	42%	31%	30%	40%	35%	36%	35%	40%	27%	31%	31%
Very important	39%	58%	62%	48%	53%	53%	56%	34%	64%	58%	51%

	Explorer	Highflier	Striver	Struggler	Overall	China	India	Middle East	Latin America	Sub-Saharan Africa	Europe
Total Responses	460	550	847	531	2388	264	1313	135	137	146	107
Reach school-Funding source											
Public	41%	53%	61%	61%	55%	23%	69%	44%	23%	48%	39%
Private not-for-profit	58%	47%	39%	39%	44%	76%	30%	55%	77%	52%	57%
Private for-profit	1%	1%	0%	1%	1%	1%	0%	1%	0%	0%	4%
Reach school-Setting											
City: Large	44%-	45%-	44%-	43%-	44%	51%	43%	39%	46%	32%	52%
City: Midsize	22%-	22%-	21%-	20%-	21%	22%	19%	24%	37%	30%	15%
City: Small	13%-	11%-	13%-	12%-	12%	13%	12%	11%	2%	16%	13%
Suburb: Large	13%-	10%-	10%-	13%-	11%	11%	11%	19%	12%	12%	9%
Suburb: Midsize	1%-	1%-	1%-	1%-	1%	0%	1%	3%	0%	1%	7%
Suburb: Small	1%-	1%-	1%-	2%-	1%	2%	1%	0%	2%	0%	0%
Rural: Distant	0%-	0%-	0%-	1%-	0%	0%	0%	0%	0%	0%	2%
Rural: Fringe	0%-	1%-	0%-	1%-	0%	0%	1%	3%	0%	0%	0%
Town: Distant	3%-	7%-	6%-	7%-	6%	0%	9%	0%	0%	6%	0%
Town: Fringe	1%-	0%-	0%-	0%-	0%	0%	0%	1%	2%	0%	2%
Town: Remote	1%-	2%-	3%-	2%-	2%	0%	3%	1%	0%	3%	0%
Reach school-Size											
Large	75%	72%	78%	70%	74%	89%	71%	60%	79%	76%	72%
Medium	19%	24%	19%	2%	21%	10%	25%	25%	11%	18%	13%
Small	7%	4%	3%	7%	5%	0%	4%	15%	9%	6%	15%
Reach school-Basic Carnegie Classification											
Research Universities (very high research activity)	53%	51%	55%	49%	52%	82%	44%	40%	70%	58%	46%
Research Universities (high research activity)	17%	12%	17%	15%	15%	11%	18%	18%	5%	16%	7%
Doctoral/Research Universities	5%	7%	4%	4%	5%	0%	5%	9%	4%	10%	11%
Master's Colleges and Universities (larger programs)	18%	22%	17%	23%	19%	3%	26%	23%	5%	7%	13%
Master's Colleges and Universities (medium programs)	2%	2%	1%	2%	2%	0%	2%	3%	0%	1%	2%
Master's Colleges and Universities (smaller programs)	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%
Other*	5%	7%	4%	9%	5%	2%	5%	9%	18%	3%	21%
Match school-Funding source											
Public	48%	60%	65%	66%	61%	33%	72%	56%	23%	58%	34%
Private not-for-profit	50%	38%	34%	33%	38%	67%	27%	41%	74%	40%	60%
Private for-profit	2%	2%	1%	1%	1%	0%	1%	3%	3%	1%	6%
Match school-Setting											
City: Large	43%--	49%--	44%--	41%--	44%	57%	39%	49%	57%	52%	49%
City: Midsize	14%--	13%--	13%--	15%--	14%	15%	13%	11%	18%	7%	15%
City: Small	10%--	10%--	11%--	10%--	10%	12%	10%	5%	11%	9%	19%
Suburb: Large	17%--	16%--	16%--	19%--	17%	13%	18%	23%	10%	18%	11%
Suburb: Midsize	1%-	1%-	1%-	1%-	1%	0%	1%	1%	0%	1%	0%
Suburb: Small	1%-	0%-	1%-	1%-	1%	1%	1%	1%	0%	0%	2%
Rural: Distant	0%-	0%-	0%-	0%-	0%	0%	0%	0%	0%	0%	0%
Rural: Fringe	1%-	1%-	1%-	1%-	1%	0%	1%	1%	2%	0%	0%
Town: Distant	9%-	8%-	8%-	11%-	9%	0%	13%	0%	2%	4%	2%
Town: Fringe	1%-	0%-	0%-	0%-	0%	0%	0%	4%	0%	3%	0%
Town: Remote	2%-	2%-	4%-	1%-	3%	0%	3%	4%	0%	4%	2%
Match school-Size											
Large	64%--	61%--	67%--	63%--	64%	83%	60%	54%	64%	62%	73%
Medium	30%--	34%--	28%--	32%--	30%	17%	34%	38%	27%	28%	17%
Small	6%-	5%-	5%-	5%-	5%	0%	6%	9%	9%	10%	10%

	Explorer	Highflier	Striver	Struggler	Overall	China	India	Middle East	Latin America	Sub-Saharan Africa	Europe
Total Responses	460	550	847	531	2388	264	1313	135	137	146	107
Match school-Basic Carnegie Classification											
Research Universities (very high research activity)	34%-	33%-	36%-	31%-	34%	71%	24%	25%	48%	36%	34%
Research Universities (high research activity)	20%-	17%-	18%-	20%-	19%	14%	21%	16%	11%	15%	19%
Doctoral/ Research Universities	7%-	8%-	6%-	6%-	7%	4%	7%	17%	7%	10%	2%
Master's Colleges and Universities (larger programs)	30%-	32%-	29%-	34%-	31%	7%	40%	27%	15%	19%	17%
Master's Colleges and Universities (medium programs)	3%-	1%-	2%-	2%-	2%	1%	2%	3%	0%	4%	9%
Master's Colleges and Universities (smaller programs)	0%-	1%-	1%-	0%-	0%	0%	0%	1%	0%	6%	0%
Other*	4%-	6%-	7%-	5%-	5%	1%	4%	4%	19%	5%	19%
Safety school-Funding source											
Public	45%	59%	66%	65%	60%	38%	67%	51%	49%	61%	38%
Private not-for-profit	53%	40%	32%	34%	38%	62%	31%	43%	49%	32%	62%
Private for-profit	2%	2%	2%	1%	2%	0%	1%	7%	3%	7%	0%
Safety school-Setting											
City: Large	39%	42%	44%	36%	41%	54%	37%	44%	44%	38%	35%
City: Midsize	20%	15%	17%	15%	17%	18%	16%	15%	18%	16%	22%
City: Small	8%	6%	10%	9%	8%	11%	7%	8%	15%	16%	5%
Suburb: Large	24%	24%	17%	18%	20%	13%	22%	23%	21%	20%	35%
Suburb: Midsize	1%	1%	1%	1%	1%	1%	1%	2%	0%	2%	3%
Suburb: Small	0%	1%	1%	1%	1%	0%	1%	0%	0%	0%	0%
Rural: Distant	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%
Rural: Fringe	0%	2%	1%	2%	1%	0%	2%	0%	3%	0%	0%
Town: Distant	7%	7%	8%	12%	9%	1%	12%	5%	0%	5%	0%
Town: Fringe	0%	1%	0%	1%	0%	0%	0%	0%	0%	2%	0%
Town: Remote	1%	2%	2%	3%	2%	0%	2%	3%	0%	2%	0%
Safety school-Size											
Large	55%-	57%-	60%-	53%-	57%	73%	53%	45%	66%	51%	50%
Medium	40%-	36%-	34%-	42%-	37%	27%	40%	49%	20%	37%	47%
Small	5%-	7%-	7%-	5%-	6%	0%	7%	5%	14%	12%	3%
Safety school-Basic Carnegie Classification											
Research Universities (very high research activity)	24%-	23%-	20%-	19%-	21%	53%	12%	8%	51%	23%	27%
Research Universities (high research activity)	22%-	25%-	23%-	24%-	23%	26%	26%	28%	3%	14%	8%
Doctoral/ Research Universities	10%-	6%-	8%-	10%-	9%	7%	8%	10%	8%	18%	5%
Master's Colleges and Universities (larger programs)	29%-	33%-	37%-	36%-	34%	7%	43%	38%	13%	20%	38%
Master's Colleges and Universities (medium programs)	2%-	3%-	2%-	1%-	2%	0%	3%	0%	0%	4%	5%
Master's Colleges and Universities (smaller programs)	1%-	1%-	0%-	0%-	0%	0%	0%	2%	3%	4%	3%
Other*	11%-	9%-	8%-	11%-	8%	4%	7%	16%	24%	19%	14%
How many U.S. colleges/universities did you apply to for admission?											
0	3%	1%	2%	6%	3%	0%	2%	8%	4%	3%	7%
1-3	40%	45%	36%	35%	39%	17%	29%	44%	73%	72%	67%
4-6	32%	32%	37%	40%	36%	21%	47%	28%	15%	19%	22%
7-10	19%	18%	20%	16%	18%	42%	19%	11%	7%	5%	4%
11-15	5%	3%	4%	3%	4%	16%	3%	3%	1%	0%	0%
More than 15	2%	1%	1%	0%	1%	3%	0%	6%	0%	0%	0%

	Explorer	Highflier	Striver	Struggler	Overall	China	India	Middle East	Latin America	Sub-Saharan Africa	Europe
Total Responses	460	550	847	531	2388	264	1313	135	137	146	107

What is your intended field of study?

Arts and humanities	6%	5%	5%	4%	5%	7%	1%	6%	19%	8%	15%
Biological and life sciences	2%	3%	4%	4%	3%	2%	2%	5%	4%	9%	7%
Business	25%	24%	13%	12%	18%	37%	10%	23%	19%	18%	25%
Education	7%	5%	2%	4%	4%	11%	1%	7%	8%	3%	8%
Engineering	22%	26%	30%	34%	28%	7%	42%	23%	9%	12%	8%
Health professions	9%	10%	11%	7%	9%	7%	5%	16%	13%	27%	9%
Math and computer science	19%	15%	24%	23%	21%	14%	32%	7%	2%	4%	8%
Physical sciences	1%	1%	1%	1%	1%	0%	1%	1%	0%	1%	1%
Social sciences	3%	5%	4%	4%	4%	5%	1%	2%	14%	10%	8%
Undecided	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%
Other	7%	6%	6%	6%	6%	9%	4%	7%	12%	8%	9%

How much are you, your family or sponsor (e.g. government, employer or NGO) able to pay for your studies per year (e.g. tuition, fees, and living expenses, etc.) at a U.S. college/university?

\$1-\$10,000	10%	11%	18%	19%	15%	5%	12%	17%	21%	32%	20%
\$10,001-\$20,000	20%	17%	26%	31%	24%	8%	30%	13%	20%	22%	28%
\$20,001-\$30,000	22%	24%	23%	24%	23%	13%	26%	22%	27%	22%	17%
\$30,001-\$40,000	17%	16%	15%	13%	15%	16%	16%	8%	10%	14%	17%
\$40,001-\$50,000	10%	13%	9%	6%	9%	21%	8%	7%	9%	4%	8%
\$50,000+	20%	19%	9%	8%	13%	37%	7%	33%	12%	6%	10%

How would you describe yourself as compared to an average international student on the following measures - My available financial resources to study in the U.S. are

Lower	14%	13%	24%	26%	20%	14%	16%	16%	35%	34%	28%
About the same	64%	57%	60%	60%	60%	70%	63%	47%	43%	54%	50%
Higher	21%	30%	16%	15%	20%	16%	21%	38%	22%	12%	22%

How would you describe yourself as compared to an average international student on the following measures - My academic ability is

Lower	2%	1%	1%	2%	2%	1%	2%	1%	0%	0%	1%
About the same	58%	41%	44%	53%	48%	47%	49%	61%	41%	39%	32%
Higher	40%	58%	55%	44%	50%	52%	49%	38%	59%	61%	67%

How many years of professional work experience do you have?

None	30%	26%	29%	36%	30%	47%	38%	20%	3%	8%	14%
Less than 3 years	36%	38%	41%	38%	39%	38%	39%	36%	31%	46%	43%
3-5 years	19%	18%	18%	18%	18%	9%	16%	25%	28%	25%	14%
6-10 years	9%	10%	8%	6%	8%	3%	5%	12%	18%	14%	12%
More than 10 years	5%	8%	4%	3%	5%	2%	1%	7%	20%	7%	17%

How many years of professional work experience do you have?

None	30%	26%	29%	36%	30%	47%	38%	20%	3%	8%	14%
Less than 3 years	36%	38%	41%	38%	39%	38%	39%	36%	31%	46%	43%
3-5 years	19%	18%	18%	18%	18%	9%	16%	25%	28%	25%	14%
6-10 years	9%	10%	8%	6%	8%	3%	5%	12%	18%	14%	12%
More than 10 years	5%	8%	4%	3%	5%	2%	1%	7%	20%	7%	17%

Note:

- Percentage may not sum up to 100% due to rounding.
- Data with "-" indicate p-value above 0.05.
- * Other includes 1) Special Focus Institutions 2) Institutions not in Carnegie universe.

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ABOUT THE AUTHORS



Zhengrong Lu, Research Associate

Zhengrong earned a master's degree in applied statistics from Teachers College, Columbia University, and a bachelor's degree in public health administration from Fudan University, China.

Contact: zlu@wes.org



Paul Schulmann, Research Associate

Paul earned a master's degree in public and international affairs from the University of Ottawa in Ontario, Canada, and a bachelor's degree in legal studies and philosophy from the University of California, Santa Cruz.

Contact: pschulma@wes.org

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