

Bridging the Digital Divide: Segmenting and Recruiting International Millennial Students

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01

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Trends in International Student Mobility

The purpose of this research is to provide an in-depth understanding of the trends and issues related to international student enrollment and to help institutional leaders and administrators make informed decisions and effectively set priorities.



Mobility Monitor

WES Research & Advisory Services' monthly Mobility Monitor analyzes international student mobility patterns to help institutions inform their market-specific strategies.

Executive Summary

Millennials—those born approximately between 1980 and 2000 are a wired generation. They communicate, acquire and share information differently than previous generations, while adopting and adapting to new technologies at an unprecedented rate. In an increasingly competitive environment for international student recruitment, higher education institutions (HEIs) need to acclimate to the evolving needs and behaviors of international Millennials.

The purpose of this research report is to provide a framework for HEIs to understand the different needs and behaviors of international Millennial student segments as a means of informing international enrollment strategies. As in our first report, *[Not All International Students Are the Same: Understanding Segments, Mapping Behavior](#)*, we divide international students into four segments—Explorers, Highfliers, Strivers and Strugglers—based on academic preparedness and financial resources (See Figure 1).

This year's report analyzes nearly five thousand 17-to-36-year-old international Millennials' **use of technology** and the **psychographic characteristics** that influence their **information-seeking behavior**.¹ It closely examines bachelor's and master's students from China and India—the two largest sources of international students in the U.S.

To achieve effective and informed international enrollment strategies, we recommend that HEIs adopt evidence-based practices to better understand the constantly changing needs and behaviors of international Millennial students. One such change is the use of digital technologies among international Millennial students in their study-abroad decision-making processes. With this in mind, we recommend that HEIs:

- **Adapt to students' technology usage.** Fifty-six percent of Millennials used a smartphone to search for and apply to U.S. colleges or universities, suggesting mobile devices play a large role in their prospect-to-application journey. It is recommended that HEIs devise a digital strategy, for example, making websites more mobile-friendly.
- **Embrace the power of network marketing.** A collective university network exerts the biggest influence on Millennial students' decision-making processes with regard to college or university choice. Admissions officers, faculty, current students and alumni comprise a cohesive university network. HEIs need to form a strategic relationship with these stakeholders and have them interact with prospective students via digital technologies.
- **Tailor content to communicate your institution's value proposition to students.** International Millennials are more likely to consume online content than produce it. This highlights the importance of generating relevant, quality content to engage with this audience.

¹ See more reports in this series: bit.ly/Segmentation2012, bit.ly/Segmentation2013

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1. Introduction

More than nine out of 10 Instagram users are under the age of 35; nearly 85% of Facebook users in India are between 16 and 34 years old.¹ Millennials worldwide—those born approximately between 1980 and 2000—have introduced a raft of new challenges and also opportunities to the field of international student recruitment. With regards to technology usage, they differ from previous generations by:

- **Communicating differently.** Millennials (24%) are twice as likely as Gen X (12%), the generation born from the mid-1960s through approximately 1980, to cite technology use as a unique attribute of their identity; 83% of Millennials sleep with their cell phone nearby as compared to 68% of Gen X.² Also, their digital activities make it easier to connect with peers and the world at large.
- **Influencing each other.** Millennials worldwide are defined by their openness and willingness to share their opinions and experiences with their peers, whether they personally know them or not. This variety of social connection and involvement has earned them the moniker “alpha-influencers.”³

The difficulty for HEIs is in knowing how to adapt to international Millennials’ evolving needs and behaviors. This poses two fundamental questions:

1. What are the characteristics of international Millennial students?
2. How should institutions convey their value proposition to recruit and enroll the best-fit prospective international Millennial students?

To answer these questions, WES surveyed 4,852 prospective international students between the ages of 17 and 36. Building on our first report, [*Not All International Students Are the Same: Understanding Segments, Mapping Behavior*](#), we deepen the understanding of prospective international students by:

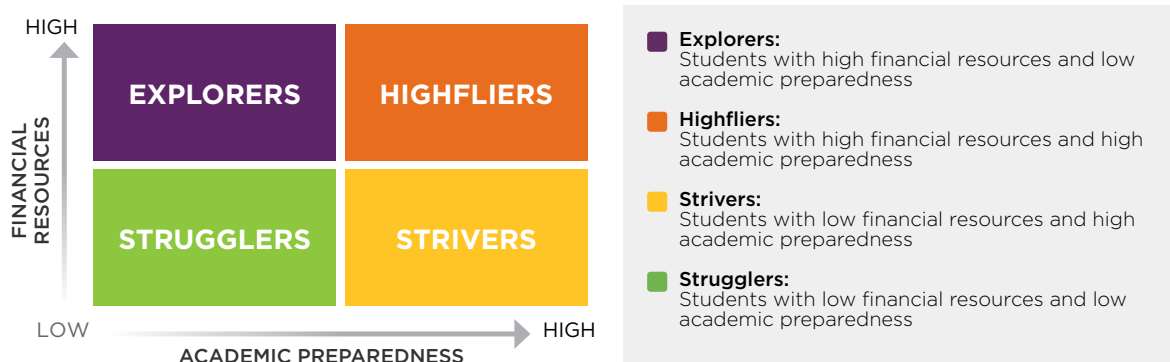
1. Exploring their **use of technology** and the **psychographic characteristics** that influence their **information-seeking behavior**,
2. Examining closely **bachelor’s and master’s students from China and India**—the two largest groups of international students in the U.S.

We investigate six topics in the study: the digital activities of Millennials, their preferred information channels, the types of information they seek, the people who influence where students apply, their study-abroad motivations, and their views on education and success. This report contains three main sections. First, Millennials in the Spotlight discusses findings by academic levels and student segments followed by Market Snapshot, which highlights the characteristics of six markets. We conclude with recommendations on how to communicate effectively with Millennials.

2. Millennials in the Spotlight

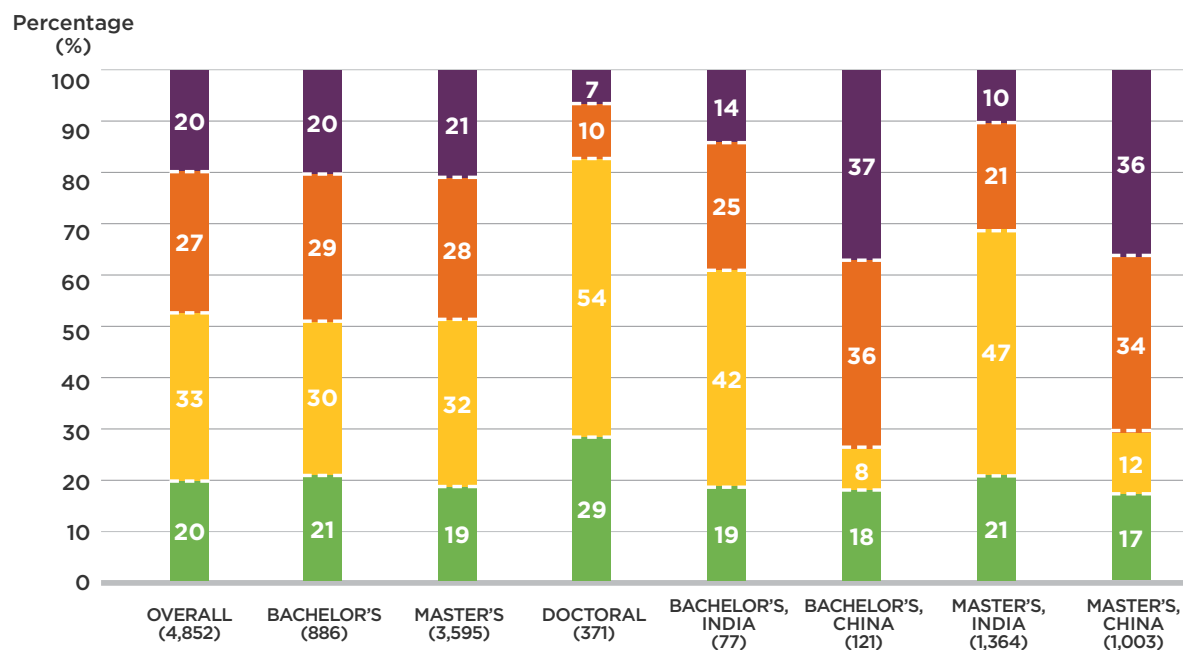
Building on our student segmentation framework, the 2014 survey canvassed 4,852 prospective students aged 17 to 36 on their use of technology, psychographic characteristics, and information-search processes. The respondents are international applicants to bachelor's, masters' and doctoral degree programs, hereafter, referred to simply as bachelor's, master's, and doctoral students (See Methodology for detail). Data with "-" shown in the tables indicate p-value above 0.05. This section discusses the major findings from each student segment in the aggregate as well as by education levels. We define the four segments of international students—Explorers, Highfliers, Strivers, and Strugglers—as follows:

FIGURE 1: Four Segments of International Students



Overall, Strivers are the largest proportion of international students represented in the study, constituting one third (33%) of all respondents, followed by Highfliers (27%), Strugglers (20%), and Explorers (20%), as shown in Figure 2.

FIGURE 2: Millennial Segments by Academic Level and Country of Origin



*Percentage may not add up to 100% due to rounding.

The proportion of students by segment varies both within and by degree level, however, the differences between bachelor's and master's students is narrow, compared with the differences with doctoral students. Fifty-four percent of Millennials who plan to pursue a doctoral degree are Strivers, while only 10% are Highfliers and 7% are Explorers.

2.1 WHAT DIGITAL LIFE ARE THEY LIVING?

We start the discussion of the survey findings by examining Millennials' interaction with the digital world. Millennials are twice as likely as the generation before to cite the use of technology as an attribute that distinguishes them from other generations, according to a study by Pew Research Center.⁴ The findings from our survey are relevant for institutions that want to utilize technologies in their outreach efforts to more effectively target particular student segments or to differentiate their marketing outreach by degree level.

- **International students consume more information online than they produce.** Nine out of 10 respondents (90%) reported that they had read or browsed a social networking site, micro-blog, or discussion forum at least once in the past 24 hours before responding to the survey, as compared to three-fifths (61%) that actually contributed content.
- **Email remains central to daily life, though not necessarily at the bachelor's level.** Bachelor's students are the least likely to report checking their email several times a day (41%) suggesting that email correspondence or outreach may be a less effective communication method for them than students at higher academic levels. In contrast, 59% of master's and 69% of doctoral students check their email several times a day.
- **Master's students are the most tech-savvy.** More than one-third of master's students (35%) "strongly agree" that they like to keep up with the latest technological devices and gadgets compared to 28% of bachelor's and doctoral students.
- **Mobile devices play a bigger role in the life of Highfliers than other segments.** Overall, students with higher financial resources are more likely to own a tablet. Forty-nine percent of Highfliers and Explorers own a tablet versus 35% of Strivers and 36% of Strugglers. Highfliers are the most likely to "strongly agree" that they like to keep up with the latest technological devices and gadgets with 41% reporting so as compared to 33% of all respondents.
- **Strivers are more wired to the digital world.** Not only are Strivers more likely to check, read and send email (66%) or check social networking sites (41%) several times a day than students from other segments, they are also the most likely to report having more than 500 friends or connections (30%) on social networking sites compared to only 17% of Explorers.

TABLE 1: Digital Activity by Academic Level and Segment

	Bachelor's (886)	Master's (3,595)	Doctoral (371)	Explorer (964)	Highflier (1,314)	Striver (1,602)	Struggler (972)	Overall (4,852)
% owning a Tablet	37%	44%	37%	49%	49%	35%	36%	42%
% who strongly agree that they like to keep up with the latest technological devices and gadgets	28%	35%	28%	23%	41%	39%	25%	33%
% who check, read, or send emails several times a day	41%	59%	69%	43%	58%	66%	52%	57%
% who visit social networking sites (e.g. Facebook) several times a day	40%	39%	39%	36%	39%	41%	39%	39%
% who read or browsed a social networking site, micro-blog, or discussion forum more than once in the past 24 hours	88%	90%	83%	93%	91%	88%	87%	90%
% who wrote on or uploaded to a social networking site, micro-blog, or discussion forum more than once in the past 24 hours	60%	61%	53%	61%	63%	60%	58%	61%
% who have over 500 friends on Facebook or other main online social networking site (e.g. RenRen for Chinese)	26%	24%	20%	17%	24%	30%	23%	24%

"Emails - I tend to check my emails more often and read them more attentively than I would a Facebook message or a tweet."
 – A master's student from Canada, Striver

2.2 WHAT INFORMATION CHANNELS ARE THEY USING TO SEARCH FOR SCHOOLS?

Living in the world of technology has fundamentally changed the way Millennials search for schools. We find that differences in the use of information channels manifest in interesting ways across academic levels and student segments. For example, master's students are savvier in using mobile devices during the information-search process, suggesting that institutions need to leverage these tools in their outreach efforts to master's students.

- **While a personal computer is utilized the most during the information-seeking process, a majority of students use smartphones as well.** Almost all (91%) respondents used a personal computer during the U.S. college/university search process. More than half (56%) used a smartphone, and one in four used a tablet (26%), suggesting opportunities for institutions to facilitate the application process by being compatible with multiple platforms.
- **Master's students prefer word-of-mouth endorsements, particularly via smartphones and tablets.** Master's students are the most likely to use online discussion forums (27%) to research information on studying in the U.S., compared to 14% of bachelor's students and 17% of doctoral students. Twenty-three percent of master's students use social media to learn more about studying in the U.S.; 49% of those who have used a mobile device during the college-search and application process used it to connect with current students on social media, as compared to 37% of bachelor's students.

- **Strivers make good use of what is available to them.** Consistent with their digital engagement, Strivers report greater usage of most of the available information channels, especially online, than other segments. Examples include: social media (27%), and virtual education fairs (7%).

TABLE 2: Use of Information Channel by Academic Level and Segment

	Bachelor's (886)	Master's (3,595)	Doctoral (371)	Explorer (964)	Highflier (1,314)	Striver (1,602)	Struggler (972)	Overall (4,852)
% who used the following to seek information about studying abroad								
Online discussion forum	14%	27%	17%	22%	23%	26%	23%	24%
Social media (e.g. Facebook)	19%	23%	16%	16%	19%	27%	24%	22%
Virtual education fairs	5%-	6%-	6%-	4%	4%	7%	6%	6%
% who used the following during the U.S. college/university search and application process								
A personal computer/laptop (my own or at home)	88%	92%	94%	87%	93%	94%	89%	91%
A smartphone	56%	57%	43%	58%	59%	54%	54%	56%
A tablet	24%-	26%-	23%-	26%	30%	23%	24%	26%
Of those who have used a mobile device during the U.S. college/university search and application process, % used it for the following activity								
Connect with current students/alumni on social media	37%	49%	42%	47%-	48%-	46%-	46%-	47%

"An official application app for each university would be convenient for both the applicants and admissions officers."

– A master's student from China, Struggler

"Send emails that describe the benefits of attending and applying and make sure that they can be viewed on smartphones."

– A bachelor's student from Saint Vincent and Grenadines, Highflier

"Interact with me via WhatsApp or WeChat, and in real-time." – A master's student from China, Striver

2.3 WHAT INFORMATION ARE THEY LOOKING FOR?

Not only do students differ by level and segment in terms of how they prefer to retrieve and receive information, but also by the type of information they seek. Using the best information channels to reach out to international students is important, but it must be matched with quality, tailored content. Typically featured on institutions' websites, the information types discussed below can be used for website optimization to make sure international students can easily find them.

- **Information on tuition and fees as well as student services is critical to bachelor's students.** Four-year bachelor's programs usually cost more out-of-pocket than masters' programs that typically take two years or less to complete. As a result, bachelor's students are more likely to select tuition and cost of living as one of their top three information needs (38%), compared to 32% of master's students. They are also the least likely (11%) to consider faculty research and expertise. Bachelor's students (20%) are also much more interested in information about student services including campus safety and student life, nearly twice as interested as master's students (11%) and three times as interested as doctoral students (7%).

- **Reputation-conscious Highfliers.** Highfliers are more reputation-conscious than their peers; 48% of them indicated information about an institution's reputation as one of their top three information needs. This emphasis is more pronounced at the master's level where 50% of Highfliers selected reputation as a top information need compared to 39% of the Highfliers at the bachelor's level.
- **The Three L's of Explorers:** Location, Location, and Location. Explorers are the most interested in information about the location of a school, no matter what academic level they are pursuing. Explorers (39%) are more than twice as likely as Strivers (18%) to choose location as a top three information need.
- **Cost-conscious Strivers.** Similar to Strugglers, Strivers (40%) are more likely to seek information related to financial aid and scholarship opportunities as one of their top three information needs as compared to their more financially endowed counterparts, Highfliers (13%) and Explorers (11%).

TABLE 3: Type of Information Sought by Academic Level and Segment

	Bachelor's (886)	Master's (3,595)	Doctoral (371)	Explorer (964)	Highflier (1,314)	Striver (1,602)	Struggler (972)	Overall (4,852)
% who select the following among their top three needs when applying to colleges/universities in the U.S.								
Program content/ course offerings	42%	49%	44%	47%	50%	49%	43%	48%
Reputation of school	36%	43%	29%	44%	48%	38%	33%	41%
Career prospects after graduation	34%	43%	27%	41%-	41%-	41%-	37%-	40%
Tuition and cost of living	38%	32%	25%	28%	30%	35%	37%	33%
Application requirements	30%-	32%-	32%-	37%	36%	26%	31%	32%
Faculty research and expertise	11%	28%	59%	22%	24%	33%	27%	27%
Location	27%	28%	16%	39%	29%	18%	26%	27%
Financial aid and scholarship opportunities	31%	22%	51%	11%	13%	40%	35%	26%
Student services (campus safety, student life, etc.)	20%	11%	7%	13%	13%	10%	15%	13%

"Be more specific about what exactly can I get from the program, in terms of knowledge and the social sphere."
– A bachelor's student from China, Explorer

2.4 WHO INFLUENCES WHERE STUDENTS APPLY?

Higher education is an experiential service characterized by investment and risk.⁵ In the case of studying abroad, it is a risky and expensive proposition as a result of the distances involved and the relative purchasing power of students from other countries.⁶ Our research indicates that a university network comprised of faculty, admissions officers, current students and alumni has the biggest influence overall on students' choices during the application process, followed by students' families. In this context, the ability to leverage a prospective student's network becomes very important; institutions need not only to convey their value proposition to students, but also to those relations who could potentially influence a student's application decisions.

- **University network has the largest influence.** More than two-fifths of the respondents (42%) cited a university network as the most influential in their decision of where to apply. In particular, 44% of master’s students chose the university network as compared to 33% of bachelor’s students.
- **Family matters.** Following the university network, family is the second most influential group and has more influence on younger students—41% percent of bachelor’s students cite family as the biggest influence on their study abroad decisions, compared to 32% of master’s students and 28% of doctoral students.

TABLE 4: Influencer by Academic Level and Segments

	Bachelor’s (886)	Master’s (3,595)	Doctoral (371)	Explorer (964)	Highflier (1,314)	Striver (1,602)	Struggler (972)	Overall (4,852)
% who chose the following as the most influential in their decision of which university and college to apply to:								
University Network*	33%	44%	49%	40%	39%	45%	42%	42%
Family	41%	32%	28%	34%	34%	31%	34%	33%
Friends	12%	14%	15%	14%	14%	13%	14%	14%
Educational Consultant	13%	11%	9%	13%	12%	10%	10%	11%

* University network includes admissions officers, faculty, current students, and alumni from a U.S. college/university

“Have designated groups for alumni that potential applicants can ask questions to regarding potential program choices.”

– A master’s student from Canada, Highflier

“Use Twitter more often, and encourage current students to come out to say some more about the program, their life and studying there.” – A master’s student from China, Struggler

“Provide avenues for prospective students to interact with faculty members through the internet.”

– A doctoral student from Ghana, Striver

“Admissions staff should help applicants to smoothly go through the application requirements, especially for specific requirements.”

– A master’s student from China, Explorer

2.5 WHAT MOTIVATES THEM TO STUDY IN THE U.S.?

Overall, the most cited reason for wanting to pursue higher education in the U.S. is the desire to expand career and life opportunities. Seventy-nine percent of respondents selected this as one of their top two reasons. As found in previous years, Highfliers and Strivers are more motivated to study in the U.S. because of the country’s reputation for high quality education and the prospect to expand career opportunities. Conversely, Explorers are motivated by the experiential aspects while Strugglers are more motivated by the possibility of financial aid and the opportunities to have new life experiences. These findings are relevant for institutions when customizing their content strategies.

- **Strivers are chasing the American dream.** Eighty-two percent of Strivers cite the desire to expand career and life opportunities as one of their top two reasons for pursuing their education in the U.S. This is more pronounced among master’s students, especially among the Striver segment, with 85% citing this motivation as compared to 75% of Explorers.

- **Strugglers and Explorers are more motivated by the prospect of living in a foreign country as well as improving their English.** Ten percent of Explorers and 7% of Strugglers cited improving English as one of their top motivations for studying in the U.S.; more than triple the percent of Strivers (3%) who selected this option. Combined, more than one-fifth of Explorers and Strugglers reported that they are motivated by the prospect of living in a foreign country, as compared to Highfliers (18%) and Strivers (14%).
- **Bachelor's students want to experience living in a foreign country.** Students at the bachelor's level were the most likely to cite the experience of living in a foreign country (22%) as one of their top two reasons for wanting to study in the U.S., compared to 17% of master's students and 13% of doctoral students. In contrast, bachelor's students (66%) were the least likely to cite comparatively higher levels of quality as one of their two primary reasons for studying in the U.S. versus 81% of master's students and 78% of doctoral students.

TABLE 5: Motivation to Study in the U.S. by Academic Level and Segment

	Bachelor's (886)	Master's (3,595)	Doctoral (371)	Explorer (964)	Highflier (1,314)	Striver (1,602)	Struggler (972)	Overall (4,852)
% who select the following among the top two reasons that lead them to seek opportunities to study in the U.S.								
I want to expand my career and life opportunities	73%	80%	78%	74%	79%	82%	76%	79%
There are more quality higher education options outside of my country	66%	81%	78%	78%	79%	79%	72%	78%
I want to experience living in a foreign country	22%	17%	13%	20%	18%	14%	22%	18%
I want to improve my English	9%	6%	3%	10%	6%	3%	7%	6%

"America is a great country with the best resources for education in the world where I can enrich my knowledge and meet excellent professors as well as students."

– A master's student from China, Explorer

"The U.S. will provide a nice platform to show my art, it will help me expand my career and other life opportunities, and excel in my own field."

– A bachelor's student from India, Striver

"I want to experience a foreign country, college life, and a different culture."

– A bachelor's student from Panama, Explorer

"There is an open environment and people there are outgoing. There are many opportunities and diverse cultures to expand my life experiences."

– A bachelor's student from China, Explorer

2.6 HOW DO THEY VIEW EDUCATION AND SUCCESS?

Our survey reveals the underlying attitudes of international Millennials towards education, success, and other factors. This is pertinent for institutions wishing to understand the fundamental values underlying student behavior and the interest to reflect the relevant themes into their value proposition strategy.

- **Strivers and Highfliers are at the top of their class.** More than 40% of Highfliers and Strivers "strongly agree" that they are the top students of their class, as compared to 19% of Explorers and

21% of Strugglers. Due to a higher share of Strivers, forty-two percent of doctoral students consider themselves to be at the top of their class compared to 34% of master's students and 26% of bachelor's students.

- **Higher education is a direct avenue for achieving success in today's workforce.** Thirty-five percent of Highfliers and 33% of Strivers "strongly disagree" that they can succeed in today's workforce without a college/university degree, versus 25% of Explorers and 28% of Strugglers.
- **A U.S. diploma is not the only path to success.** Overall, only 8% of respondents strongly agreed that they have to study at a U.S. college/university to achieve their career goals. Although recognizing the value of higher education in helping them succeed, respondents are less likely to think that studying in the U.S. is their only option.
- **Earning potential doesn't define a person's success.** Despite their academic preparation and career aspirations, Highfliers and Strivers are less likely to assess career outcomes and success in strictly financial terms compared to Explorers and Strugglers. Twenty-four percent of Highfliers and Strivers combined "strongly disagree" that they tend to measure a person's career by how much he or she earns, as compared to Explorers (14%) and Strugglers (17%).

TABLE 6: Attitudes by Academic Level and Segment

	Bachelor's (886)	Master's (3,595)	Doctoral (371)	Explorer (964)	Highflier (1,314)	Striver (1,602)	Struggler (972)	Overall (4,852)
% who strongly agree that they would describe themselves as being one of the best students in their class	26%	34%	42%	19%	40%	43%	21%	33%
% who strongly disagree that they don't need a college/university degree to be successful in today's work force	33%	30%	36%	25%	35%	33%	28%	31%
% who strongly disagree that they can achieve career goals without going to study at a U.S. college/university	12%	8%	11%	6%	10%	9%	7%	8%
% who strongly disagree that they tend to measure a person's career by how much he or she earns	21%	20%	26%	14%	24%	25%	17%	21%

"I believe there are better opportunities for those who work hard and wish to excel in all career paths."
– A doctoral student from Canada, Striver

3. Market Snapshot

The following sections provide a more granular look at Millennials by segment, level of education (bachelor's and master's), and country of education (China vs. India).

3.1 BACHELOR'S STUDENTS

A previous report highlighted that current international enrollment in the U.S. is fueled by growth at the undergraduate level.⁷ There were 271,943 international students enrolled in bachelor's degree programs in 2013, an increase of 39% from 2009.⁸

Explorers

20% OF THE SURVEY RESPONDENTS

Explorers see a U.S. education as the path to success – they believe that studying in the U.S. is imperative for achieving their career goals. Their world-view tends to be more grounded in material possessions.



74%

cited the quality of education outside of their home countries as one of the key drivers to study in the U.S.



41%

“strongly agree” or “agree” that they tend to measure a person's career by how much he or she earns.

Highfliers

29% OF THE SURVEY RESPONDENTS

Highfliers want the best of the best – they value school reputation more than other segments. They are also more digitally active, making it easier to engage with them through technology.



39%

chose the reputation of the school among their top three information needs.



47%

reported checking, reading, and sending emails several times a day.

Strivers

30% OF THE SURVEY RESPONDENTS

Strivers are self-driven and heavily involved in social networking.



56%

“strongly disagree” or “disagree” that their family's expectations about their academic achievements are higher than their own.



88%

said they have read or browsed a social networking site, microblog, or discussion forum at least once in the past 24 hours.

Strugglers

21% OF THE SURVEY RESPONDENTS

Similar to Strivers, Strugglers are more likely than their well-resourced counterparts to seek financial support. They are also more likely to need academic support to study in the U.S.



44%

chose financial aid opportunities among their top information needs.



42%

planned to attend an intensive English program in the U.S.

3.2 MASTER'S STUDENTS

In total, 23% of all international students in the U.S. were enrolled in master's programs in 2013. This translated to a total of 165,978 international students and an increase of 15% from 2009 to 2013 (IIE).

Explorers

21% OF THE SURVEY RESPONDENTS

Explorers are interested in the experience of living abroad. However, they are less likely than other segments to use a variety of information sources, which may make it more challenging to reach out to them.



21%

cited the experience of living in a foreign country as one of the top two reasons for studying in the U.S.



40%

chose location as one of their top three information needs; 39% chose application requirements.



50%

chose the reputation of an institution as one of their top three information needs.



44%

"strongly agree" that they like to keep up with the latest technological devices and gadgets.

Strivers

32% OF THE SURVEY RESPONDENTS

Strivers are career-oriented. They work with what they have and report greater usage of information channels than other segments.



85%

cited expanding career and life opportunities as one of the top two reasons leading them to study in the U.S.



30%

used an online discussion forum to search information about U.S. schools.



11%

cited funding opportunities from their home country as one of the reasons for studying in the U.S.



44%

have either completed or plan to attend an intensive English program in the U.S., the highest among all the segments.

Strugglers

19% OF THE SURVEY RESPONDENTS

They need more support to fund their studies in the U.S. and require more assistance with academic preparation.

3.3 BACHELOR'S STUDENTS FROM INDIA

In 2012/13, 12,740 Indian students were enrolled in undergraduate programs in the U.S. India was the fifth largest source country for undergraduate international students (IIE). We predict that the number of Indian students of financial resource studying at the undergraduate level in the U.S. will increase as the children of India's middle class reach college age.⁹

1. Financial resources are below average but higher than master's students from India



39%

have high financial resources, as compared to 49% of all bachelor's students.



42%

selected tuition and cost of living as one of their top three information needs.



45%

indicated that they plan to pursue a degree in Engineering, followed by 17% in Math and Computer Science.

2. More likely to use mobile devices to connect with current students or alumni



49%

of those who have used a mobile device during the U.S. college/university search and application process used it to complete and submit their university applications; 43% used it to connect with current students/alumni on social media.



88%

cited the quality of higher education outside of India and 86% cited expanding career and life opportunities as a key driver for studying in the U.S.



58%

view a U.S. education as imperative for achieving their career aspirations.

3. Family has a great influence



70%

"strongly agree" or "agree" that their family's expectations about their academic achievements are higher than their own.



38%

selected family as the biggest influencer; 31% chose university network.



48%

reported that the GPA of their highest obtained degree was between 3.5 and 4.0.



21%

selected faculty research and expertise as one of their top information needs.

3.4 BACHELOR'S STUDENTS FROM CHINA

In total, 28% (93,789) of all international students at the undergraduate level in the U.S. hail from China, making it the largest source country in 2012/13. Total undergraduate students from China jumped 257% between 2009 and 2013 (IIE).

1. Greater financial resources



73%

have high financial resources.



68%

said they came from an upper or upper-middle class background.



87%

cited the quality of higher education outside of their home country as one of the top two reasons for studying in the U.S.



54%

view a U.S. degree as crucial for achieving career goals.

2. Connect through online discussion forums and mobile devices



28%

used online discussion forums to search for information about studying abroad.



55%

of those who used a mobile device during the U.S. college/university search and application process used it to connect with current students/alumni on social media.



49%

chose the reputation of schools as one of their top information needs.



37%

selected location as one of their top information needs.

3. Trust university network



39%

indicated that the university network has the largest influence over where they apply, followed by 35% choosing family.



45%

applied to 6-10 institutions as compared to 16% of all bachelor's students.

3.5 MASTER'S STUDENTS FROM INDIA

India is the second largest source of international graduate students in the U.S. with an enrollment of 54,607 in 2012/13 (IIE). The Council of Graduate Schools reported that first-time graduate enrollments from India jumped 40% from 2012 to 2013, while 2014 application numbers increased 33% from the previous year.¹⁰

1. Use social media to seek information about studying abroad



33%

used social media to seek information on studying abroad.



64%

of those who used a mobile device during the U.S. college/university search and application process visited social media sites managed by a college or university.



46%

"strongly agree" or "agree" that their family's expectations about their academic achievement are higher than their own.



45%

cited the university network as the greatest influence on their choice of where to apply, as compared to 32% who cited family.

2. Mobile devices play a large role



19%

used a tablet during the U.S. college/university search and application process; 58% used a smartphone.



35%

of those who used a mobile device during the U.S. college/university search and application process completed and submitted a university application using mobile devices.



88%

cited quality higher education and 87% cited career opportunities as one of the top two reasons for pursuing their education in the U.S.



38%

listed faculty research and expertise as one of their top three information needs.

3. Cost is still a main concern



42%

cited tuition and living costs as one of their top three information needs; 29% cited financial aid and scholarship opportunities.



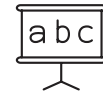
55%

expected to use loans as a primary source for funding their master's degree.



40%

reported that they plan to study Engineering, 21% Math and Computer Science, and 21% Business/Management.



70%

do not plan to attend an intensive English program in the U.S.; only 4% have already attended one.

3.6 MASTER'S STUDENTS FROM CHINA

In 2012/13, Chinese students accounted for one-third of international students at the graduate level in the U.S., which translated to over 100,000 total Chinese students. Chinese enrollment in graduate programs jumped 80% from 2009 (57,452) to 2013 (103,505) (IIE).

1. More likely to be self-driven than family-driven



58%

“strongly disagree” or “disagree” that their family’s expectations about their academic achievements are higher than their own.

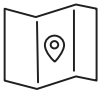
4. University network has the greatest influence on where they apply



44%

reported that the university network is their biggest influence when applying to institutions in the U.S., followed by family (29%).

2. Location is key



42%

chose information on location as one of their top three information needs.



25%

cited the experience of living in a foreign country as a prime motivator for studying in the U.S.

5. Focus more on reputation



49%

selected reputation as one of their top information needs.

3. Online engagement with U.S. institutions



34%

used an online discussion forum to seek information on studying in the U.S.



67%

of those who used a mobile device during the U.S. college/university search and application process used it to connect with current students or alumni on social media.

6. Interest in business-related fields



50%

listed Business/Management as their field of study, dwarfing Education, the second most cited field (10%).

4. Recommendations and Conclusions

Following WES's segmentation approach, the 2014 survey dives deeper into the psychographic characteristics of Millennial students and their use of technology. Our report reveals differences by student segments, academic levels, and also between the two largest source countries for international students in the U.S.: China and India. Based on our research, we recommend the following actions to effectively recruit international Millennials:

- **Adapt to students' technology usage.** Mobile devices play a big role in Millennials' prospect-to-application journey, especially among Highfliers who are the most likely to own a tablet and use mobile devices for email communication with international admissions offices. We recommend that institutions devise a mobile strategy, for example, revamping websites to be more mobile-friendly for international enrollment management.
- **Embrace the power of network marketing.** The collective university network exerts the biggest influence on Millennials' decision-making process, followed by family. Institutions need to keep this in mind as they need to not only convey their value proposition to students, but also those relations who could potentially influence a student's decision on which school to apply. First, admissions officers, faculty, current students and alumni comprise a cohesive university network; institutions need to form strategic relationships with these stakeholders and use them to interact with prospective students. Second, families should be an integral part of outreach efforts. For example, institutions can invite students' families to networking events and deliver e-newsletter to families, in addition to other measures.
- **Tailor content to communicate your institution's value proposition to students.** Despite being active in the digital world, international Millennials are more likely to consume information than produce content. This highlights the importance of an institution's role in generating relevant content to attract this audience. For example, blogging about tips on how to look for scholarships and financial aid is very relevant to Strivers, while showcasing campus life and student activities will likely generate interest from bachelor's students and Explorers.

In a climate of decreasing budgets and increasing pressure to recruit international students, we recommend that institutions adopt evidence-based practices to better understand the constantly changing needs and behaviors of international Millennial students. Reassessing your recruitment strategies and adapting them to the needs of your target audience is the best way to ensure a good return on investment for your recruitment efforts.

5. Methodology

The findings of this report are based on an online survey offered to applicants for foreign credential evaluation at World Education Services (www.wes.org), administered from October 2013 to March 2014. We define Millennials as those aged 17 to 36 years old at the time of responding to our survey. In total, 4,852 questionnaires were completed. The respondents are international degree-seeking applicants for bachelor's, master's, and doctoral degrees. 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, they 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. Percentage may not sum up to 100% due to rounding.

Academic Preparedness

Respondents are 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 are 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.

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.

6. Survey Data and Findings

	Segmentation							Overall	Bachelor's				Master's				Bachelor's		Master's	
	Bachelor's	Master's	Doctoral	Explorer	Highflier	Striver	Struggler		Explorer	Highflier	Striver	Struggler	Explorer	Highflier	Striver	Struggler	India	China	India	China
Total Responses	886	3595	371	964	1314	1602	972	4852	178	254	264	190	759	1022	1138	676	77	121	1364	1003
Segmentation																				
Explorer	20%	21%	7%	-	-	-	-	20%	-	-	-	-	-	-	-	-	14%	37%	10%	36%
Highflier	29%	28%	10%	-	-	-	-	27%	-	-	-	-	-	-	-	-	25%	36%	21%	34%
Striver	30%	32%	54%	-	-	-	-	33%	-	-	-	-	-	-	-	-	42%	8%	47%	12%
Struggler	21%	19%	29%	-	-	-	-	20%	-	-	-	-	-	-	-	-	19%	18%	21%	17%
How many U.S. colleges/institutions are you applying to?																				
1-2	51%	23%	27%	27%	32%	27%	27%	28%	47%	56%	51%	49%	21%	26%	22%	21%	22%	19%	11%	12%
3-5	24%	33%	36%	26%	29%	37%	32%	32%	21%	21%	28%	25%	27%	31%	38%	34%	36%	26%	45%	20%
6-10	16%	34%	22%	35%	29%	28%	29%	30%	21%	15%	14%	15%	38%	33%	32%	35%	34%	45%	38%	52%
11-15	3%	6%	8%	6%	6%	4%	6%	5%	3%	3%	3%	4%	7%	7%	4%	6%	6%	7%	2%	13%
More than 15	1%	1%	3%	2%	1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	0%	0%	2%	0%	1%
Don't know	4%	4%	4%	5%	3%	3%	5%	4%	6%	3%	3%	6%	5%	3%	3%	4%	1%	2%	3%	2%
At the present time, what field of study are you applying to?																				
Business/Management	25%	30%	3%	34%	31%	21%	23%	27%	28%	26%	22%	25%	36%	33%	25%	26%	8%	35%	21%	50%
Engineering	17%	20%	10%	14%	17%	21%	20%	18%	15%	13%	21%	17%	14%	18%	23%	22%	45%	12%	40%	7%
Health Professions	10%	11%	33%	10%	12%	14%	13%	13%	11%	9%	11%	8%	8%	11%	12%	12%	4%	4%	7%	4%
Math and Computer Science	6%	12%	4%	9%	9%	11%	11%	10%	4%	4%	5%	9%	10%	10%	13%	12%	17%	6%	21%	6%
Education	2%	6%	7%	7%	5%	4%	5%	5%	3%	1%	3%	3%	8%	6%	4%	5%	0%	4%	1%	10%
Fine and Applied Arts	12%	3%	0%	4%	5%	4%	5%	5%	10%	15%	11%	12%	3%	3%	3%	4%	9%	12%	1%	4%
Social Science	4%	5%	7%	6%	5%	6%	4%	5%	5%	3%	5%	2%	6%	6%	6%	4%	0%	6%	1%	7%
Physical and Life Science	6%	2%	22%	2%	3%	7%	5%	4%	3%	6%	6%	7%	2%	2%	3%	1%	3%	6%	2%	1%
Humanities	2%	1%	2%	1%	2%	2%	2%	2%	1%	2%	3%	2%	1%	2%	1%	2%	1%	1%	1%	1%
Agriculture	0%	0%	1%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%
Other	13%	9%	12%	11%	9%	9%	11%	10%	16%	15%	10%	9%	10%	8%	9%	11%	9%	12%	6%	8%
Undecided	4%	1%	0%	1%	1%	1%	1%	1%	3%	4%	3%	6%	1%	0%	1%	0%	4%	2%	0%	1%
Which of the following statement applies to your experience with intensive English language programs?																				
I have already completed an intensive English program (IEP/ESL) in the U.S.	12%	7%	7%	11%	10%	6%	8%	8%	19%	13%	9%	8%	9%	9%	5%	8%	9%	12%	4%	8%
I have not attended any intensive English program (IEP/ESL) in the U.S., but I plan to attend one in the future.	34%	30%	28%	32%	28%	28%	37%	31%	35%	33%	30%	42%	32%	27%	28%	36%	23%	37%	26%	33%
I do not plan to attend an intensive English program (IEP/ESL) in the U.S.	54%	62%	65%	56%	62%	66%	55%	61%	46%	55%	61%	51%	58%	64%	67%	56%	68%	51%	70%	58%
Please estimate your cumulative GPA of your highest credential/degree on a 4.0 scale.																				
3.8-4.0 (A 93-100%)	15%	13%	26%	11%	15%	18%	13%	15%	15%	17%	15%	11%	10%	14%	16%	12%	21%	18%	15%	9%
3.5-3.7 (A- 90-92%)	23%	29%	33%	28%	28%	28%	29%	28%	19%	23%	24%	25%	29%	29%	30%	28%	27%	28%	26%	36%
3.2-3.4 (B+ 84-89%)	27%	29%	25%	31%	28%	27%	29%	28%	29%	22%	28%	31%	31%	30%	26%	29%	16%	36%	27%	34%
2.9-3.1 (B 84-86%)	15%	16%	7%	18%	15%	14%	16%	15%	16%	16%	12%	17%	19%	15%	15%	17%	11%	11%	16%	17%
2.6-2.8 (B- 81-83%)	10%	6%	4%	6%	7%	6%	5%	6%	9%	11%	11%	6%	6%	6%	6%	5%	8%	4%	4%	3%
2.3-2.5 (C+ 78-80%)	5%	3%	3%	4%	3%	3%	3%	3%	5%	6%	5%	4%	4%	2%	2%	2%	3%	3%	4%	1%
2.0-2.2 (C 75-77%)	3%	2%	1%	2%	2%	2%	3%	2%	4%	3%	1%	5%	1%	2%	2%	3%	6%	1%	3%	1%
<2.0	3%	2%	1%	1%	2%	3%	3%	2%	3%	3%	3%	2%	1%	2%	3%	3%	8%	0%	6%	0%
I feel academically prepared to enter a U.S. college/university.																				
Strongly Disagree	4%	5%	3%	11%	0%	0%	11%	4%	9%	0%	0%	9%	11%	0%	0%	12%	6%	6%	4%	6%
Disagree	1%	1%	0%	2%	0%	0%	2%	1%	2%	0%	0%	2%	3%	0%	0%	2%	0%	2%	0%	2%
Neither Agree nor Disagree	5%	4%	2%	12%	0%	0%	9%	4%	12%	0%	0%	11%	12%	0%	0%	9%	1%	7%	1%	6%
Agree	43%	37%	33%	72%	14%	14%	75%	38%	74%	20%	20%	75%	71%	13%	14%	74%	32%	49%	32%	45%
Strongly Agree	48%	53%	61%	3%	86%	86%	4%	53%	4%	80%	80%	4%	3%	87%	86%	4%	60%	37%	62%	40%

	Overall							Bachelor's				Master's				Bachelor's		Master's		
	Bachelor's	Master's	Doctoral	Explorer	Highflier	Striver	Struggler	Explorer	Highflier	Striver	Struggler	Explorer	Highflier	Striver	Struggler	India	China	India	China	
Total Responses	886	359	537	964	1314	1602	972	4852	178	254	264	190	759	1022	1138	676	77	121	1364	1003

I expect that my English skills will be as good as fellow students at my future college/university.

Strongly Disagree	4%	4%	3%	11%	0%	0%	10%	4%	10%	0%	0%	8%	11%	0%	0%	11%	6%	4%	4%	6%
Disagree	3%	2%	1%	4%	0%	0%	5%	2%	4%	0%	0%	8%	4%	0%	0%	4%	0%	5%	0%	3%
Neither Agree nor Disagree	7%	6%	5%	15%	0%	0%	17%	6%	15%	0%	0%	21%	15%	0%	0%	17%	1%	5%	2%	9%
Agree	41%	43%	45%	68%	26%	26%	67%	43%	71%	27%	20%	61%	68%	26%	27%	68%	40%	48%	43%	46%
Strongly Agree	45%	45%	45%	1%	74%	74%	1%	45%	1%	73%	80%	1%	2%	74%	73%	1%	52%	38%	50%	35%

What will be the main sources for funding your education in the U.S.? Please select up to TWO.

Financial support from family or friends	70%	68%	34%	77%	79%	53%	56%	66%	80%	80%	64%	59%	77%	80%	55%	59%	70%	80%	70%	82%
Personal savings	37%	40%	20%	55%	57%	21%	24%	38%	51%	59%	14%	25%	57%	57%	24%	25%	32%	40%	30%	46%
Financial aid from colleges / universities in the U.S. (merit-based scholarships, teaching assistance, etc.)	32%	23%	68%	0%	0%	53%	50%	28%	0%	0%	65%	58%	0%	0%	45%	44%	21%	12%	21%	20%
Loan	12%	26%	11%	0%	0%	44%	39%	22%	0%	0%	25%	21%	0%	0%	54%	47%	43%	5%	55%	6%
Grants or scholarships from external sources (government, NGO, employer, etc.)	16%	12%	38%	9%	7%	20%	23%	15%	8%	6%	22%	29%	8%	7%	16%	19%	3%	12%	2%	5%

If you were asked to use one of these commonly used names for the social classes in your home country, which would you say you belong in?

Upper class	10%	9%	6%	11%	12%	6%	5%	9%	11%	17%	6%	5%	11%	11%	6%	5%	5%	17%	7%	11%
Upper-middle class	43%	44%	32%	42%	50%	43%	37%	43%	49%	48%	41%	30%	40%	50%	46%	39%	66%	51%	57%	34%
Middle class	39%	43%	51%	45%	35%	44%	51%	43%	37%	30%	41%	53%	46%	36%	43%	51%	25%	30%	34%	51%
Lower-middle class	7%	3%	9%	2%	2%	6%	6%	4%	2%	4%	9%	12%	2%	2%	5%	4%	4%	2%	2%	4%
Lower class	2%	1%	2%	0%	0%	1%	1%	1%	1%	2%	3%	1%	0%	0%	1%	1%	0%	1%	0%	1%

Please select how often you do the following activities.- Check, read, or send emails

Never	1%	0%	0%	1%	0%	0%	1%	1%	1%	0%	0%	2%	1%	0%	0%	1%	1%	0%	0%	1%
Less than once a week	2%	2%	1%	2%	2%	1%	2%	2%	1%	2%	1%	3%	3%	2%	1%	2%	0%	2%	1%	2%
Once every few days	18%	8%	6%	15%	8%	7%	12%	10%	26%	13%	17%	19%	13%	7%	5%	11%	16%	28%	5%	14%
About once a day	38%	31%	24%	39%	31%	27%	32%	31%	39%	38%	36%	41%	39%	30%	26%	30%	42%	40%	29%	42%
Several times a day	41%	59%	69%	43%	58%	66%	52%	57%	33%	47%	45%	34%	45%	61%	69%	56%	42%	30%	65%	41%

Please select how often you do the following activities. - Visit social networking sites (e.g. Facebook)

Never	3%	2%	2%	2%	2%	2%	3%	2%	3%	2%	2%	5%	2%	2%	2%	3%	4%	4%	2%	2%
Less than once a week	6%	6%	8%	8%	6%	6%	6%	6%	8%	4%	7%	6%	8%	6%	5%	7%	10%	6%	5%	6%
Once every few days	17%	16%	18%	18%	16%	16%	17%	16%	21%	15%	15%	18%	17%	16%	16%	17%	18%	27%	15%	21%
About once a day	34%	36%	33%	36%	37%	36%	34%	36%	32%	36%	32%	36%	37%	37%	37%	33%	44%	38%	44%	34%
Several times a day	40%	39%	39%	36%	39%	41%	39%	39%	35%	43%	45%	35%	37%	39%	40%	40%	23%	25%	33%	37%

Please select how often you do the following activities. - Watch streaming TV shows, movies, or videos on the internet

Never	4%	2%	3%	2%	2%	3%	3%	3%	2%	3%	6%	5%	2%	2%	2%	3%	4%	1%	2%	1%
Less than once a week	15%	13%	20%	11%	13%	16%	13%	14%	12%	14%	20%	13%	10%	13%	14%	12%	18%	12%	10%	9%
Once every few days	30%	31%	30%	34%	29%	32%	30%	31%	33%	28%	28%	32%	35%	29%	32%	30%	22%	45%	27%	41%
About once a day	31%	34%	42%	35%	36%	30%	32%	33%	38%	33%	25%	31%	35%	36%	31%	33%	35%	30%	38%	33%
Several times a day	20%	20%	15%	18%	20%	20%	21%	20%	16%	22%	21%	20%	18%	20%	20%	22%	21%	12%	23%	17%

In the past 24 hours, how many times, if any, did you do the following activities?- Read or browse a social networking site, micro-blog, or discussion forum (e.g. check friend's profile, read others' tweets).

None	11%	10%	16%	7%	9%	12%	13%	10%	12%	7%	13%	14%	5%	10%	11%	12%	18%	6%	10%	6%
1-3 times	56%	60%	55%	66%	60%	56%	56%	59%	64%	60%	52%	52%	67%	60%	58%	57%	52%	77%	61%	64%
4-10 times	24%	21%	17%	20%	22%	21%	23%	22%	20%	24%	27%	25%	20%	22%	21%	23%	18%	14%	19%	24%
>10 times	8%	9%	11%	7%	9%	11%	8%	9%	4%	9%	9%	9%	8%	9%	11%	8%	12%	3%	9%	7%

In the past 24 hours, how many times, if any, did you do the following activities?- Write or upload on a social networking site, micro-blog, or discussion forum (e.g. post status updates, comment on a blog).

None	40%	38%	47%	38%	37%	41%	42%	39%	40%	33%	43%	45%	37%	37%	40%	40%	39%	26%	39%	34%
1-3 times	50%	49%	44%	50%	52%	47%	47%	49%	50%	55%	47%	46%	51%	51%	47%	47%	49%	67%	49%	55%
4-10 times	8%	9%	6%	9%	8%	9%	8%	9%	8%	9%	9%	6%	9%	8%	9%	10%	10%	7%	8%	8%
>10 times	2%	3%	3%	2%	3%	4%	3%	3%	2%	2%	2%	3%	3%	4%	4%	3%	1%	0%	4%	3%

								Overall	Bachelor's				Master's				Bachelor's		Master's	
	Bachelor's	Master's	Doctoral	Explorer	Highflier	Striver	Struggler		Explorer	Highflier	Striver	Struggler	Explorer	Highflier	Striver	Struggler	India	China	India	China
Total Responses	886	3595	371	964	1314	1602	972	4852	178	254	264	190	759	1022	1138	676	77	121	1364	1003
How many "friends" do you have on Facebook or your main online social networking site (e.g. Renren for Chinese)?																				
0	4%	3%	3%	4%	4%	2%	4%	3%	6%	2%	2%	6%	4%	4%	2%	4%	5%	7%	2%	4%
1-50	14%	9%	10%	14%	11%	6%	9%	10%	19%	13%	10%	16%	13%	10%	5%	8%	19%	26%	5%	11%
51-100	12%	11%	15%	15%	12%	9%	13%	12%	16%	12%	8%	15%	15%	12%	8%	12%	10%	20%	7%	15%
101-300	25%	28%	31%	29%	27%	28%	27%	28%	24%	29%	25%	21%	31%	27%	28%	27%	17%	26%	25%	29%
301-500	20%	24%	22%	20%	22%	25%	23%	23%	16%	22%	20%	19%	21%	23%	27%	26%	25%	15%	31%	22%
>500	26%	24%	20%	17%	24%	30%	23%	24%	19%	22%	35%	23%	17%	24%	24%	24%	23%	7%	29%	19%
Do you own any of the following items? Please check all that apply.																				
Smartphone (iPhone, Android, Blackberry, etc.)	85%	88%	78%	88%	90%	86%	83%	87%	84%	91%	85%	79%	89%	90%	88%	85%	81%	85%	87%	90%
Laptop	75%	81%	84%	78%	82%	84%	75%	80%	78%	80%	78%	63%	77%	82%	85%	78%	66%	64%	82%	76%
Personal computer	38%	46%	44%	46%	47%	43%	41%	44%	44%	44%	31%	33%	47%	48%	44%	43%	39%	54%	48%	54%
Tablet (iPad, Samsung Galaxy, Motorola Zoom, etc.)	37%	44%	37%	49%	49%	35%	36%	42%	43%	44%	30%	32%	51%	50%	36%	39%	25%	50%	32%	59%
Basic phone	25%	28%	36%	25%	27%	31%	28%	28%	29%	22%	26%	26%	24%	28%	31%	27%	31%	24%	28%	27%
I like to keep up with the latest technological devices and gadgets.																				
Strongly Disagree	3%	3%	4%	3%	2%	2%	3%	3%	3%	3%	2%	5%	3%	2%	2%	3%	3%	2%	1%	3%
Disagree	15%	12%	20%	15%	10%	13%	16%	13%	20%	12%	14%	15%	14%	9%	11%	15%	5%	12%	5%	15%
Agree	48%	44%	42%	51%	42%	42%	49%	45%	49%	48%	45%	52%	51%	40%	42%	48%	44%	56%	40%	49%
Strongly Agree	28%	35%	28%	23%	41%	39%	25%	33%	21%	31%	35%	20%	24%	44%	40%	27%	43%	25%	49%	26%
Don't know	6%	5%	6%	8%	5%	4%	7%	6%	7%	6%	4%	8%	8%	4%	4%	6%	5%	5%	5%	7%
Please select all of the sources you have used to seek information about studying abroad.																				
College/University websites	90%	91%	89%	89%	90%	94%	90%	91%	88%	90%	93%	87%	89%	90%	94%	91%	91%	91%	93%	91%
Web search	66%	72%	75%	67%	69%	76%	71%	71%	66%	65%	66%	66%	68%	69%	78%	72%	61%	68%	74%	69%
Online discussion forum	14%	27%	17%	22%	23%	26%	23%	24%	15%	11%	15%	17%	24%	26%	30%	26%	13%	28%	30%	34%
Education fairs (in person)	24%	23%	18%	20%	23%	24%	23%	23%	20%	27%	29%	18%	20%	22%	25%	25%	30%	23%	25%	22%
Social media (e.g. Facebook)	19%	23%	16%	16%	19%	27%	24%	22%	15%	14%	25%	19%	17%	21%	28%	27%	14%	15%	33%	21%
Virtual education fairs	5%	6%	6%	4%	4%	7%	6%	6%	6%	3%	6%	5%	4%	5%	7%	6%	8%	3%	5%	6%
Other (please specify)	10%	6%	9%	4%	6%	9%	7%	7%	6%	9%	13%	10%	3%	5%	7%	6%	5%	3%	6%	2%
Which of the following devices have you used during the U.S. college/university search and application process? Select all that apply.																				
A personal computer/laptop (my own or at home)	88%	92%	94%	87%	93%	94%	89%	91%	83%	92%	88%	85%	89%	93%	95%	89%	84%	86%	94%	90%
A smartphone	56%	57%	43%	58%	59%	54%	54%	56%	61%	59%	50%	56%	58%	59%	56%	56%	56%	63%	58%	60%
A tablet	24%	26%	23%	26%	30%	23%	24%	26%	24%	26%	23%	24%	27%	31%	23%	24%	16%	31%	19%	33%
A shared computer at school, Internet café, etc.	18%	16%	20%	14%	16%	19%	14%	16%	16%	15%	23%	15%	13%	16%	18%	13%	23%	18%	15%	14%
Please select all activities that you've done with your smartphone and/or tablet.																				
Search information on a university's program	89%	93%	92%	87%	94%	94%	90%	92%	86%	90%	91%	87%	87%	95%	95%	91%	89%	87%	96%	87%
Communicate with admissions staff over email	66%	61%	69%	55%	66%	65%	60%	62%	54%	71%	66%	70%	54%	65%	64%	57%	55%	57%	59%	57%
Visit social media site(s) managed by a university	56%	59%	56%	56%	59%	58%	57%	58%	52%	58%	58%	52%	58%	60%	58%	59%	55%	59%	64%	62%
Connect with current students/alumni on social media	37%	49%	42%	47%	48%	46%	46%	47%	40%	38%	34%	39%	49%	51%	48%	49%	43%	55%	51%	67%
Complete and submit a university application	38%	33%	35%	31%	38%	34%	31%	34%	36%	42%	40%	35%	30%	37%	32%	30%	49%	24%	35%	27%
Please select up to THREE areas of information you seek when applying to colleges / universities in the U.S.																				
Program content/course offerings	42%	49%	44%	47%	50%	49%	43%	48%	42%	43%	45%	37%	48%	51%	51%	44%	42%	43%	49%	42%
Reputation of school	36%	43%	29%	44%	48%	38%	33%	41%	36%	39%	35%	31%	45%	50%	41%	35%	38%	49%	40%	49%
Career prospects after graduation	34%	43%	27%	41%	41%	41%	37%	40%	35%	37%	33%	31%	42%	42%	46%	41%	38%	46%	48%	49%
Tuition and cost of living	38%	32%	25%	28%	30%	35%	37%	33%	35%	35%	41%	40%	27%	29%	36%	37%	42%	26%	42%	21%
Application requirements	30%	32%	32%	37%	36%	26%	31%	32%	31%	37%	25%	27%	39%	35%	26%	32%	27%	32%	20%	41%
Faculty research and expertise	11%	28%	59%	22%	24%	33%	27%	27%	13%	11%	12%	9%	24%	26%	33%	28%	21%	17%	38%	22%
Location	27%	28%	16%	39%	29%	18%	26%	27%	33%	29%	24%	23%	40%	30%	18%	29%	16%	37%	15%	42%
Financial aid and scholarship opportunities	31%	22%	51%	11%	13%	40%	35%	26%	15%	16%	47%	44%	9%	12%	34%	29%	35%	7%	29%	10%
Student services (campus safety, student life, etc.)	20%	11%	7%	13%	13%	10%	15%	13%	23%	18%	15%	28%	11%	12%	9%	13%	19%	16%	12%	11%
Transferability of credits obtained in home country	15%	2%	4%	5%	5%	4%	5%	5%	16%	16%	13%	14%	3%	3%	2%	3%	8%	12%	1%	2%
Cultural/religious accommodations	5%	3%	2%	4%	4%	2%	3%	3%	7%	6%	3%	5%	3%	3%	2%	3%	4%	8%	2%	5%
Transferability of credits obtained in the U.S.	6%	2%	1%	3%	3%	2%	3%	3%	7%	7%	4%	4%	2%	2%	1%	3%	5%	1%	1%	2%

								Bachelor's				Master's				Bachelor's		Master's		
	Bachelor's	Master's	Doctoral	Explorer	Highflier	Striver	Struggler	Overall	Explorer	Highflier	Striver	Struggler	Explorer	Highflier	Striver	Struggler	India	China	India	China
Total Responses	886	3595	371	964	1314	1602	972	4852	178	254	264	190	759	1022	1138	676	77	121	1364	1003

Please drag and rank the people or groups of people who influence you the most when applying to colleges/universities in the U.S.*

Family	41%	32%	28%	34%	34%	31%	34%	33%	37%	45%	39%	44%	34%	32%	32%	32%	38%	35%	32%	29%
Friends	12%	14%	15%	14%	14%	13%	14%	14%	12%	11%	13%	11%	13%	14%	13%	15%	12%	12%	14%	14%
University Network**	33%	44%	49%	40%	39%	45%	42%	42%	35%	34%	36%	30%	41%	42%	46%	44%	31%	39%	45%	44%
Educational Consultant	13%	11%	9%	13%	12%	10%	10%	11%	16%	10%	13%	15%	12%	12%	10%	9%	19%	13%	9%	13%

Please select the top TWO reasons that lead you to seek opportunities to study abroad in the U.S.

I want to expand my career and life opportunities.	73%	80%	78%	74%	79%	82%	76%	79%	74%-	73%-	76%-	68%-	75%	81%	85%	77%	86%	68%	87%	75%
There are more quality higher education options outside of my country.	66%	81%	78%	78%	79%	79%	72%	78%	74%	69%	62%	59%	79%	82%	83%	77%	88%	87%	88%	86%
I want to experience living in a foreign country.	22%	17%	13%	20%	18%	14%	22%	18%	17%-	25%-	22%-	22%-	21%	17%	14%	22%	12%	23%	13%	25%
There is scholarship or government funding for overseas study from my home country.	14%	8%	15%	10%	7%	11%	13%	10%	13%	8%	19%	17%	9%	7%	8%	11%	4%	7%	4%	3%
I want to improve my English.	9%	6%	3%	10%	6%	3%	7%	6%	12%	7%	4%	14%	10%	5%	3%	6%	4%	10%	1%	7%
I want to avoid the political and social conditions in my home country.	4%	2%	4%	2%-	3%-	2%-	3%-	3%	2%-	4%-	4%-	6%-	2%-	3%-	2%-	2%-	1%	2%	2%	2%
I plan to immigrate in the future.	5%	2%	5%	3%-	2%-	3%-	4%-	3%	5%-	5%-	5%-	6%-	2%-	1%-	2%-	3%-	1%	2%	1%	1%
Other (please specify)	7%	3%	5%	2%	5%	5%	3%	4%	2%	8%	8%	7%	2%	4%	4%	2%	4%	1%	3%	0%

I don't need a college/university degree to be successful in today's work force.

Strongly Disagree	33%	30%	36%	25%	35%	33%	28%	31%	22%	37%	38%	32%	26%	34%	30%	27%	36%	36%	25%	33%
Disagree	46%	53%	48%	54%	50%	50%	54%	52%	51%	46%	45%	42%	55%	51%	53%	56%	35%	49%	56%	56%
Agree	13%	11%	12%	13%	10%	12%	12%	11%	19%	9%	10%	17%	11%	10%	12%	11%	17%	11%	12%	7%
Strongly Agree	3%	2%	1%	3%	2%	2%	2%	2%	3%	3%	2%	4%	3%	2%	2%	2%	4%	2%	3%	1%
Don't know	5%	4%	2%	5%	3%	3%	4%	4%	4%	4%	5%	5%	5%	3%	3%	4%	8%	2%	5%	4%

I can achieve my career goals without going to study at a U.S. college/university.

Strongly Disagree	12%	8%	11%	6%	10%	9%	7%	8%	10%	12%	11%	12%	4%	10%	8%	6%	13%	7%	8%	7%
Disagree	36%	41%	34%	41%	39%	40%	39%	40%	44%	36%	33%	35%	41%	40%	43%	41%	45%	47%	47%	43%
Agree	36%	35%	37%	36%	35%	35%	37%	36%	30%	37%	38%	36%	37%	35%	34%	37%	27%	33%	30%	34%
Strongly Agree	8%	5%	7%	5%	7%	7%	4%	6%	6%	9%	13%	3%	4%	6%	6%	4%	5%	3%	3%	3%
Don't know	8%	11%	11%	13%	9%	9%	13%	10%	10%	6%	5%	13%	14%	9%	9%	12%	9%	10%	12%	13%

I would describe myself as being one of the best students in my class.

Strongly Disagree	2%	1%	1%	2%	1%	1%	2%	1%	3%	1%	0%	3%	2%	1%	1%	2%	1%	2%	1%	2%
Disagree	13%	9%	8%	12%	8%	6%	14%	10%	14%	15%	10%	15%	12%	7%	5%	14%	3%	12%	6%	9%
Agree	49%	50%	43%	56%	45%	45%	54%	49%	53%	44%	50%	48%	57%	45%	46%	55%	51%	45%	50%	50%
Strongly Agree	26%	34%	42%	19%	40%	43%	21%	33%	17%	30%	34%	17%	19%	42%	43%	21%	39%	31%	36%	32%
Don't know	10%	7%	6%	11%	6%	5%	9%	7%	12%	10%	6%	16%	11%	5%	5%	8%	6%	10%	7%	6%

My family's expectations about my academic achievement are higher than my own.

Strongly Disagree	8%	8%	9%	6%	9%	9%	6%	8%	6%	9%	9%	6%	6%	9%	9%	7%	4%	2%	6%	6%
Disagree	39%	44%	44%	41%	45%	45%	41%	43%	34%	39%	47%	33%	42%	47%	45%	43%	18%	44%	39%	52%
Agree	31%	27%	27%	33%	25%	25%	31%	28%	38%	30%	23%	35%	32%	23%	26%	31%	49%	36%	31%	26%
Strongly Agree	14%	13%	12%	10%	15%	13%	12%	13%	11%	16%	13%	14%	10%	14%	14%	12%	21%	9%	15%	10%
Don't know	9%	8%	8%	11%	7%	7%	9%	8%	11%	6%	8%	12%	11%	7%	7%	8%	8%	9%	9%	7%

I tend to measure a person's career by how much he or she earns.

Strongly Disagree	21%	20%	26%	14%	24%	25%	17%	21%	14%	23%	25%	19%	14%	24%	24%	15%	26%	19%	23%	15%
Disagree	42%	49%	49%	46%	46%	49%	49%	47%	38%	43%	44%	44%	48%	47%	50%	50%	44%	47%	49%	52%
Agree	25%	22%	18%	29%	20%	18%	24%	22%	33%	24%	19%	27%	27%	19%	19%	24%	21%	23%	18%	25%
Strongly Agree	6%	5%	2%	5%	6%	4%	4%	5%	8%	7%	6%	5%	4%	6%	4%	4%	3%	9%	4%	4%
Don't know	5%	5%	5%	7%	4%	4%	5%	5%	7%	4%	6%	5%	7%	4%	4%	6%	6%	2%	6%	4%

Note:

- Percentage may not add up to 100% due to rounding.
- Data with "-" indicate p-value above 0.05. Results in the last four columns are not calculated for statistical significance.
- * Number indicates share of respondents that chose the people or groups of people who have the most influence on them when applying to colleges/universities in the U.S.
- ** University network includes 1) Admissions officers from a U.S. college/university 2) Faculty from a U.S. college/university 3) Current students at a U.S. college/university 4) Alumni from a U.S. college/university

7. References and Notes

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