Data indicate that international students are ever-more essential to our success.

1 Million international students come to the U.S. each year

They contribute **$38 Billion** to the U.S. economy

Help us achieve our tuition, research and instructional goals

2025 is projected to begin the domestic enrollment "cliff"

International grad enrollment is surging, up **21.3% YOY**

Sources: Open Doors and McKinsey and Company

How can we better locate and engage students who are becoming increasingly important to us?

Start by getting to know them better.

Tap into growing markets

India is the largest growing market for U.S. graduate programs

India (166K)

- **India is not only the largest in graduate enrollment by more than 40K, but it also grew by 63% this year.**
- More likely to enroll in public institutions (66.1%).

China (126K)

- Largest overall U.S. enrollment.
- Mild grad enrollment growth (2% YOY).
- 50.2% enroll in private institutions.

Tap into growing markets

Korea and Canada rank as the next largest growing markets

South Korea (15K)
- Despite its small geographic size, S. Korea is third in sending grad students to the U.S. and grew 2.6% YOY this year.
- More likely to enroll in public institutions (66.1%).

Canada (10K)
- 4th largest sender of grad students.
- 3.2% YOY growth in grad enrollment.
- Most likely of the top four to enroll at a private institution (60.1%).

Source: Open Doors

Tap into growing markets

The next three largest markets are sending a comparable number of students to the U.S., but Nigeria leads in recent growth and future growth potential.

Nigeria

- **9,555 international students studying in the U.S. (32.5% YOY growth)**
- **231 Million population**
- **20.6% aged 15-24**
- 73.9% public

Taiwan

- 9,985 international students studying in the U.S. (10.8% YOY growth)
- 23 Million population
- 10.2% aged 15-24
- 62.2% public

Bangladesh

- 9,985 international students studying in the U.S. (23.4% YOY growth)
- 167 Million population
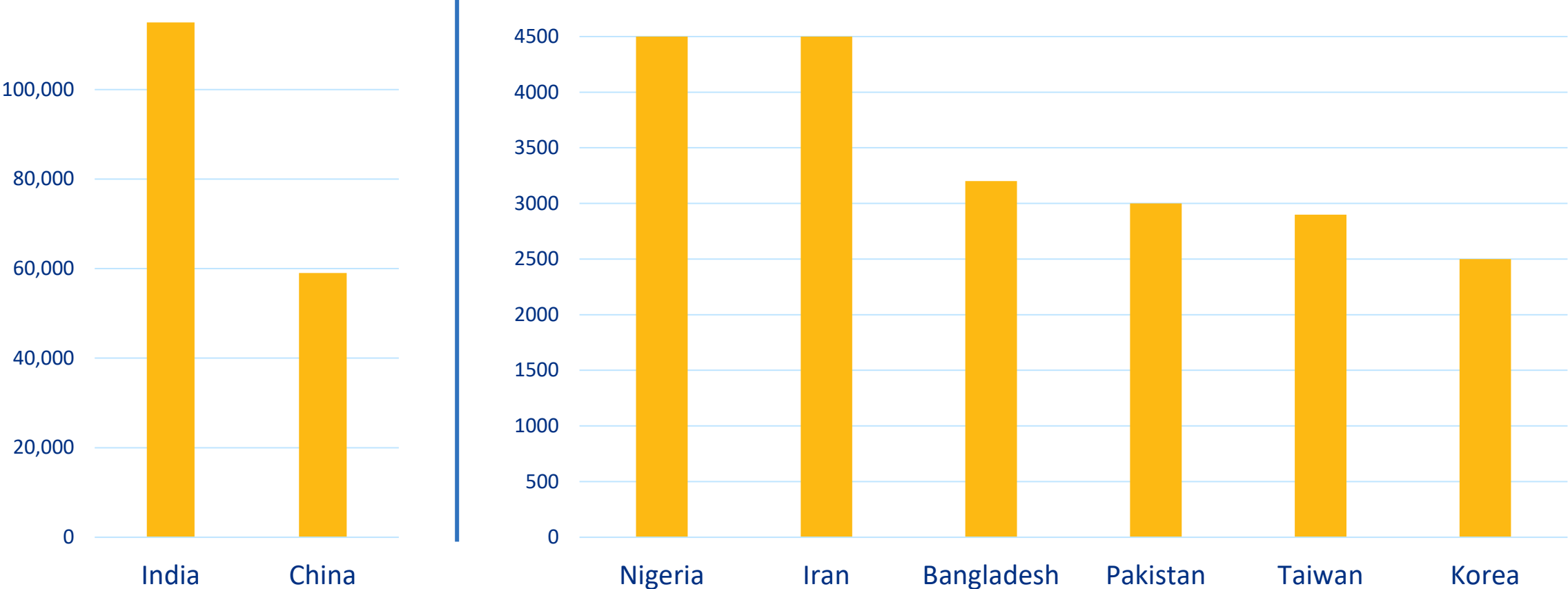- 17.3% aged 15-24
- 83.7% public

Source: Open Doors

GRE test taker data can help us further understand nuances between countries.

This can help us use our marketing and recruitment resources most **efficiently**.

It also helps us vary our messaging toward each audience for maximum **effectiveness**.

About 87% of international GRE test takers come from 8 countries

8

Students likely to be male and have little work experience

International GRE test takers are more likely to be males than females, except in China and South Korea.

Students are most likely to have less than one year of full-time work experience, except in Nigeria, where 2-5 years was most commonly selected.

Testing Year 2022-23

Legend: ■ Female ■ Male
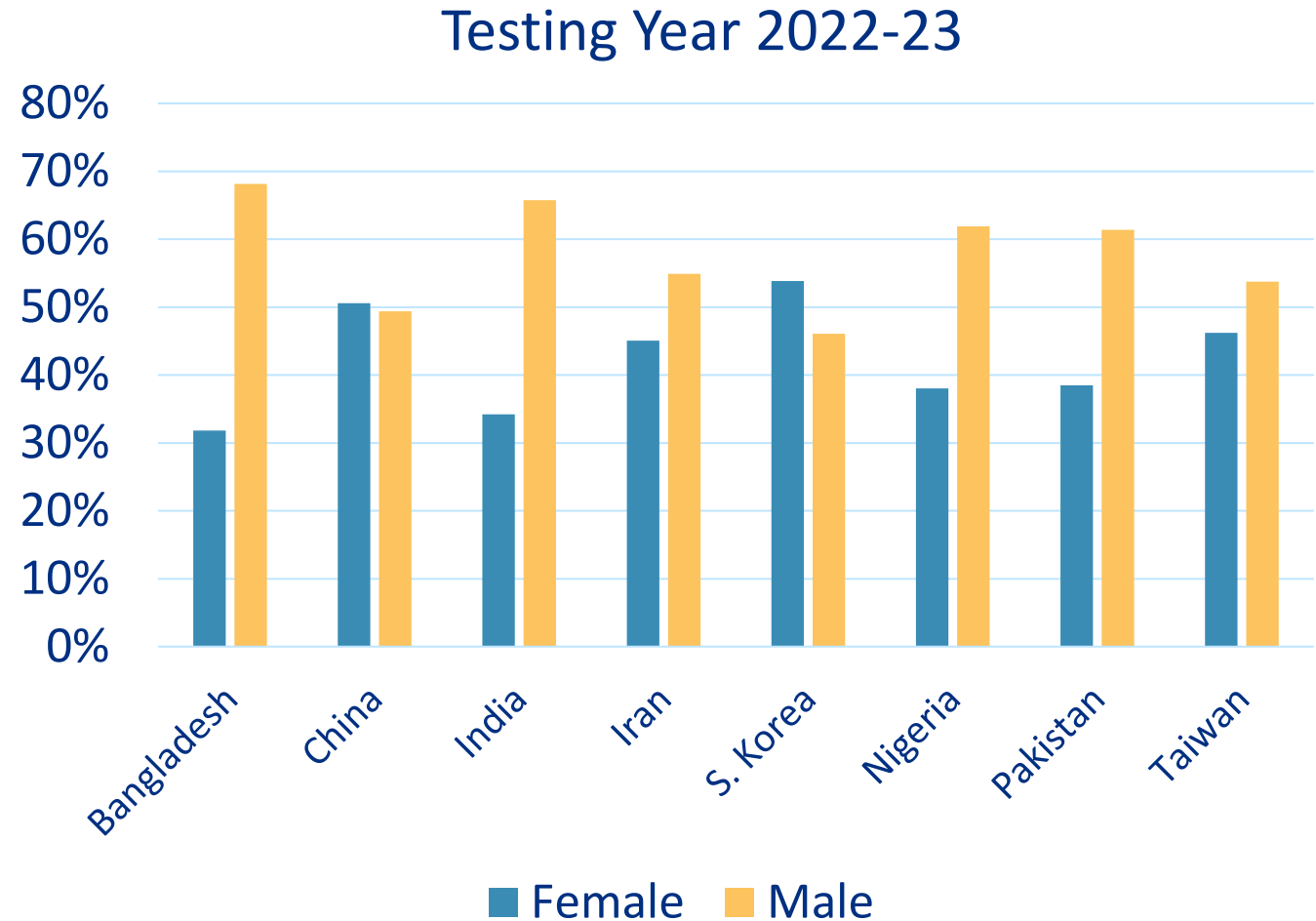
Though the master's degree is more popular overall, a doctorate is preferred by students in four of the top eight countries.
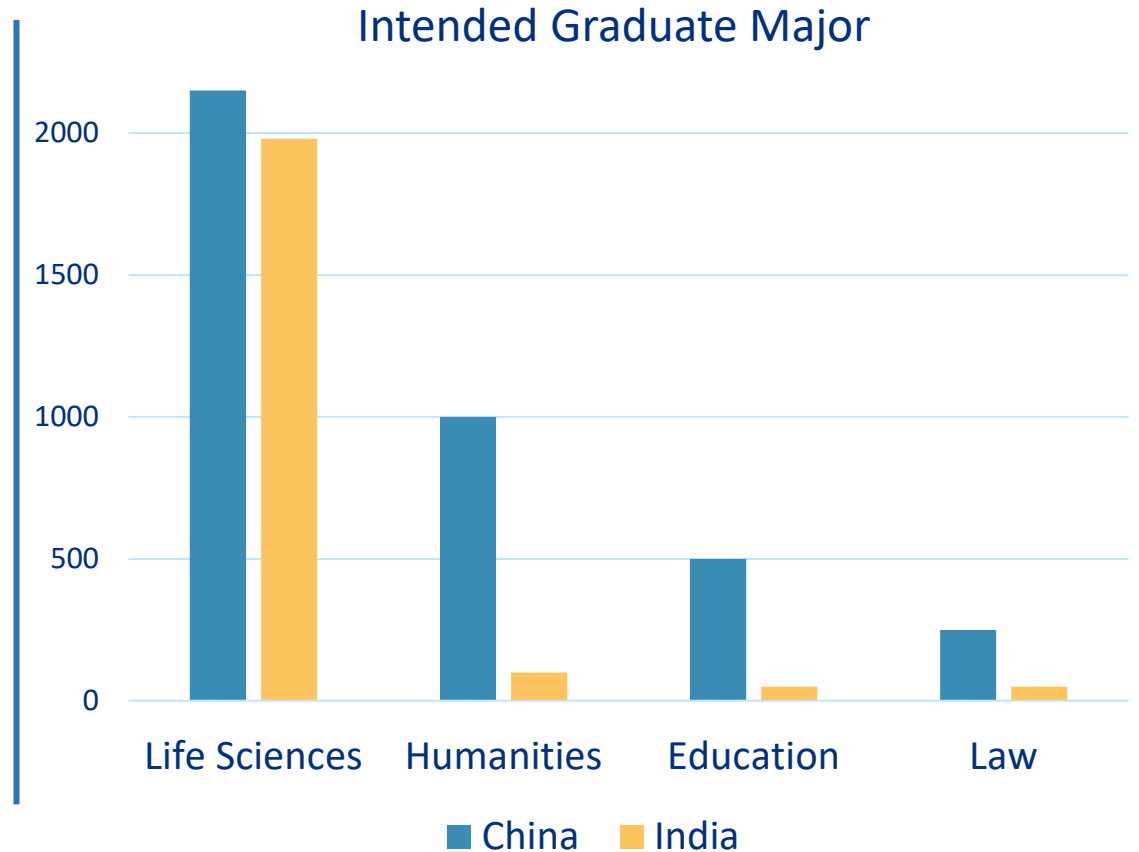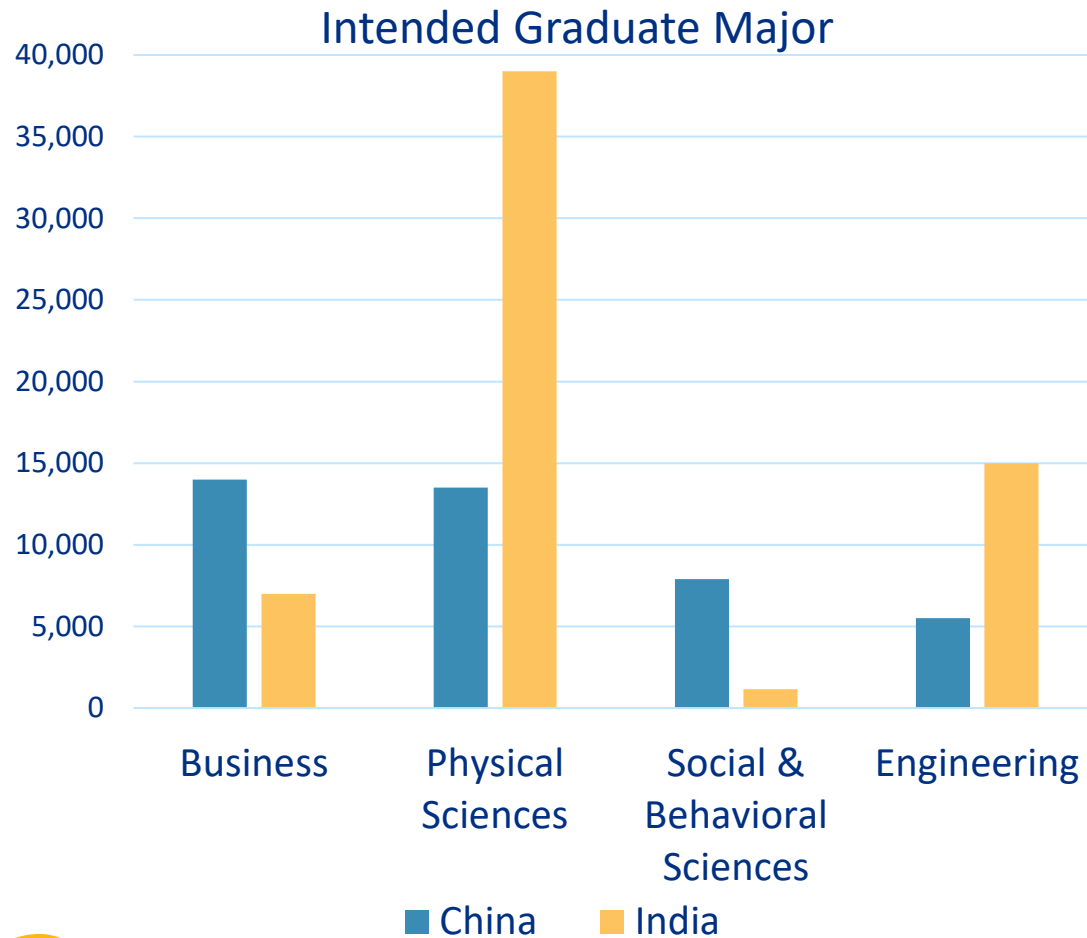
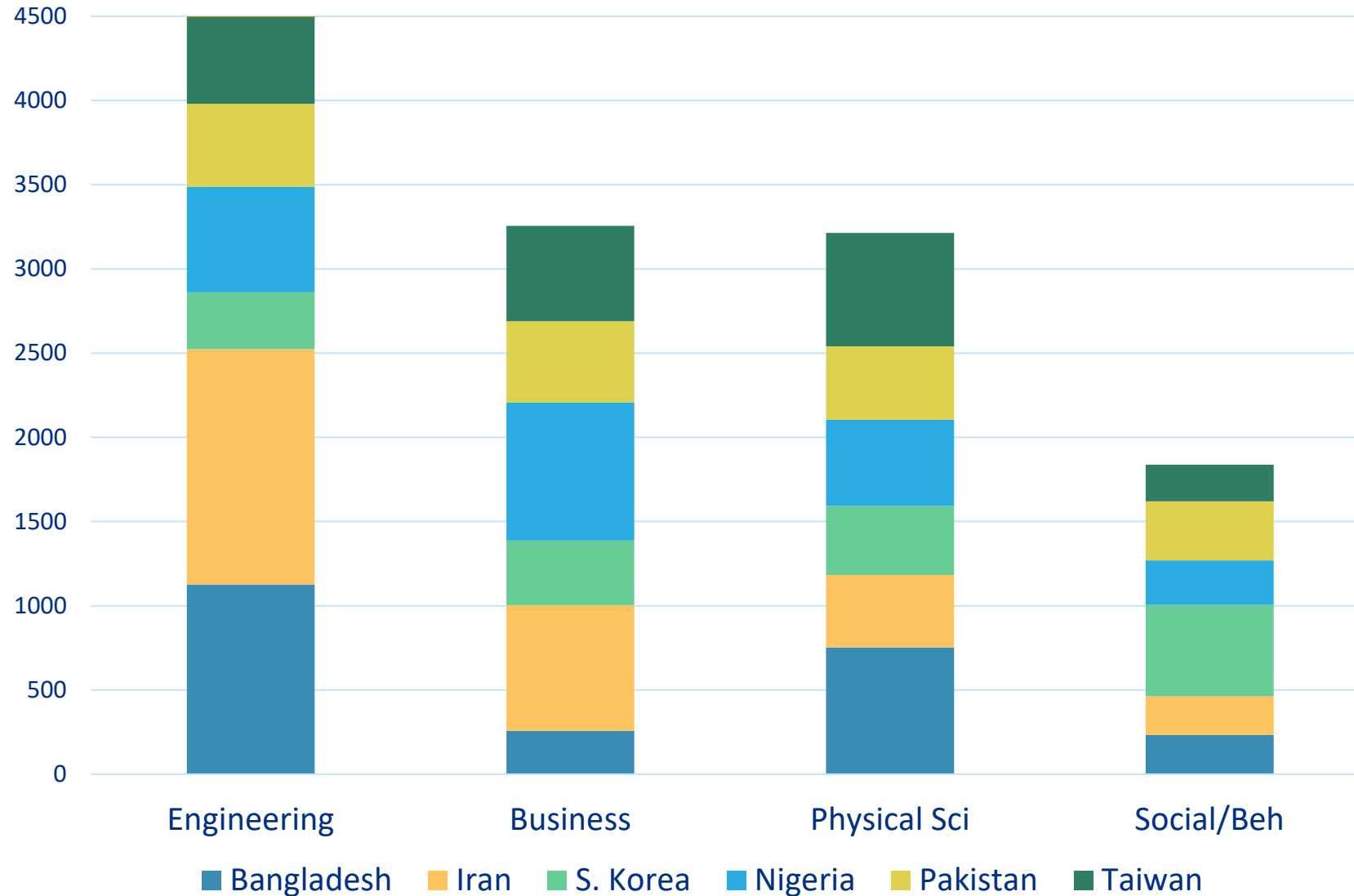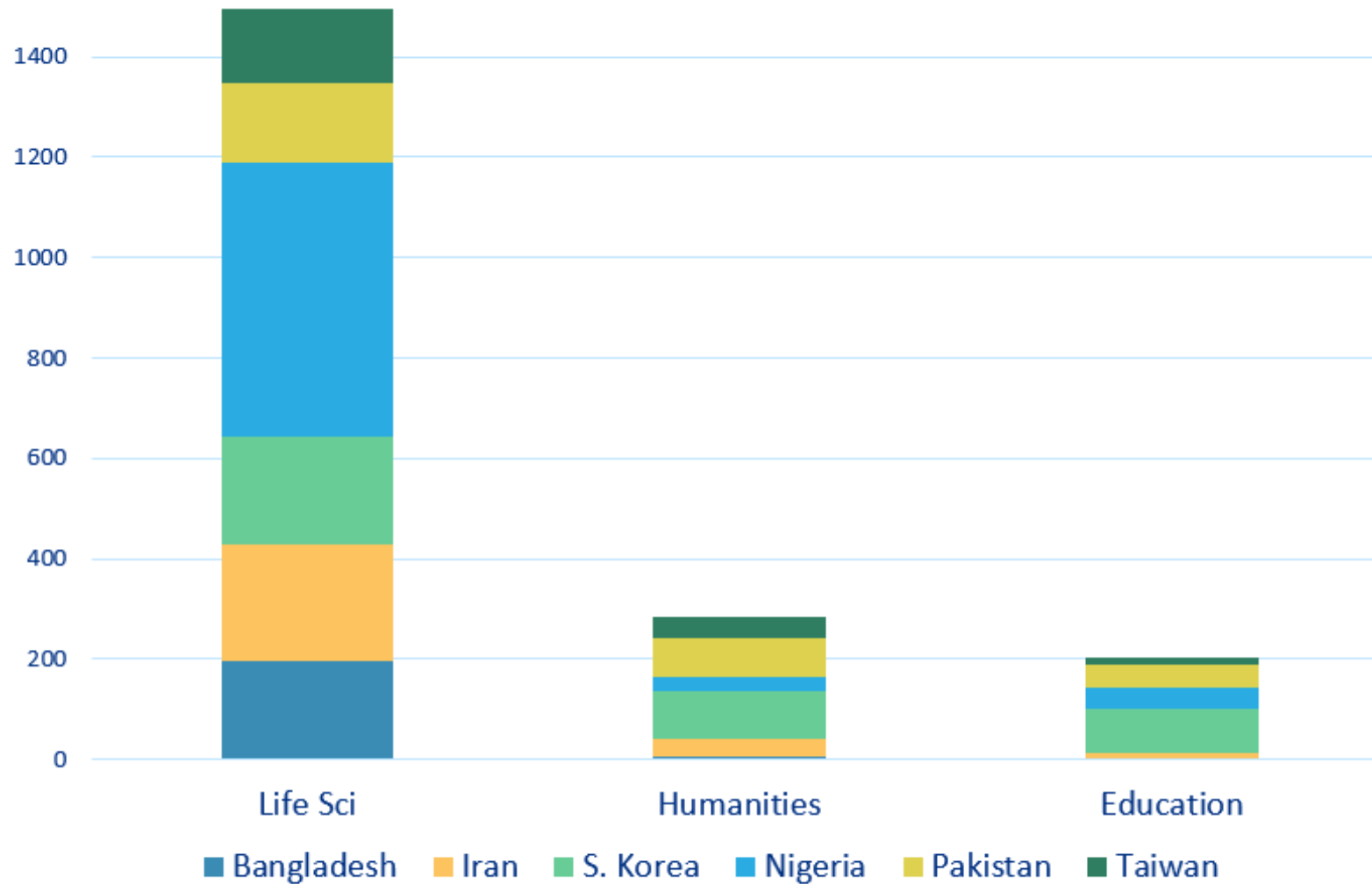| Countries where master's is preferred	Countries where doctorate is preferred
India	Bangladesh
China	Nigeria
Pakistan	Iran
Taiwan	S. Korea

Source: Unpublished GRE test taker data (2022-23)

The sciences dominate, but Chinese and Indian students are also interested in business and humanities

Intended Graduate Major

Chart showing intended graduate major (approximate values):
- Business: China ~14,000, India ~7,000
- Physical Sciences: China ~13,500, India ~39,000
- Social & Behavioral Sciences: China ~8,000, India ~1,000
- Engineering: China ~5,500, India ~15,000

Legend: China (blue), India (orange)

Intended Graduate Major

Chart showing intended graduate major (approximate values):
- Life Sciences: China ~2,100, India ~1,975
- Humanities: China ~1,000, India ~100
- Education: China ~475, India ~75
- Law: China ~250, India ~75

Legend: China (blue), India (orange)

Source: Unpublished GRE test taker data (2022-23)

Intended graduate major varies by country

Source: Unpublished GRE test taker data (2022-23)

South Koreans lead interest in Humanities, Education

Legend: Bangladesh · Iran · S. Korea · Nigeria · Pakistan · Taiwan

TOEFL test taker data enriches our understanding of target audiences

Over half of test takers responded that they are taking the TOEFL test for graduate or post-graduate studies.

The most popular fields of interest across all TOEFL test takers are, in descending order:

- Business
- Engineering
- Computing & Information Technology

Source: Unpublished TOEFL test taker data

China and India: Audience values, interests and behaviors

Global market research study aimed to better understand prospective test takers

Objective

Evaluate test takers' **values, interests, opinions and habits** to gain insights that will help:

- Inform communications
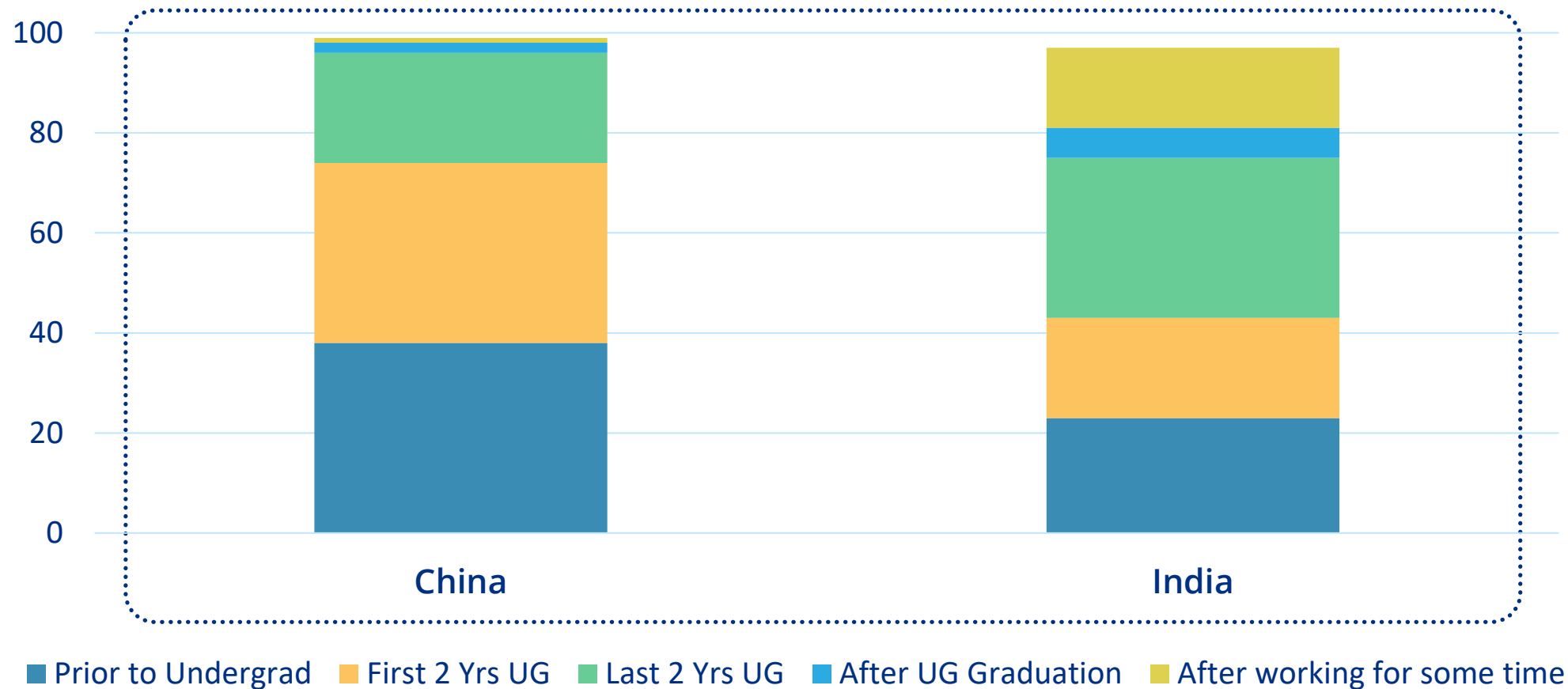- Identify new content topic areas that may help applicants on their educational journey

Methodology

25-minute online survey of 3875 GRE test takers

- U.S.: n=2971
- **China: n=203**
- **India: n=439**
- Rest of World: n=262

Tip: Communicate with Chinese students earlier in their educational journey

Legend: ■ Prior to Undergrad   ■ First 2 Yrs UG   ■ Last 2 Yrs UG   ■ After UG Graduation   ■ After working for some time

Academic clubs, sports and language/communications clubs topped the list of undergraduate activities

China

Academic Club/Society	22%
Language Clubs	21%
Club Sports	16%
Intramural Sports	16%
PR/Communications Club	16%
Acapella/Singing Group	13%
Accounting/Math Clubs	12%
None	12%

India

Academic Club/Society	33%
Club Sports	27%
PR/Communications Club	23%
None	18%
Debate Club	17%
Other	17%
Language Clubs	13%
Dance Classes	13%

Tip: Ensure communications focus not only on your program offerings and reputation but also share information about your institution's broader offerings to entice candidates.

Communicating passion and purpose is key

China and India differed in their top responses but agree that passion is essential.

China

Personal development	36%
Doing work I'm passionate about	20%
Job requirement	10%

India

Career advancement	16%
Doing work I'm passionate about	15%
Skillset development	13%

GRE Test Takers are generally more driven by positive desires such as wanting to specialize in a field than from anxiety-driven reasons such as feeling anxious about their career or feeling left out because their friends are pursuing a graduate degree.

Tip: Communications to candidates may be especially effective if they emphasize how a graduate degree in a particular field can help them achieve a purpose and fulfill their need for passion in their careers and lives.
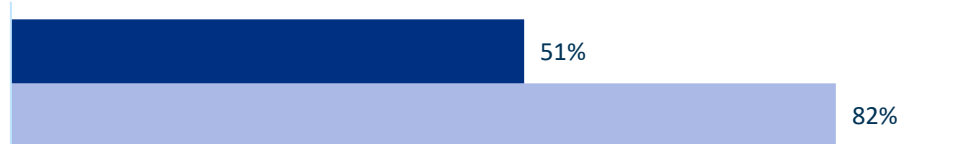
Understanding values and interests can help your teams target messaging appropriately
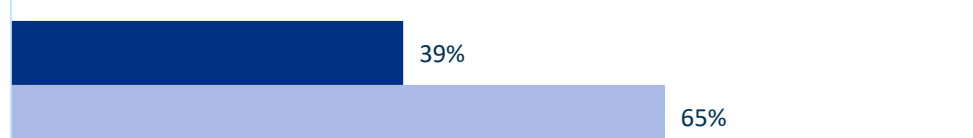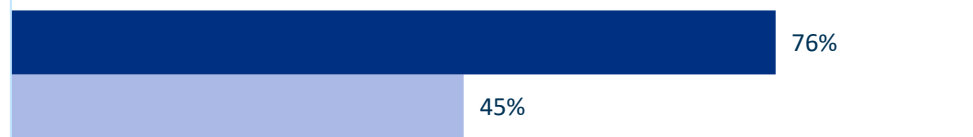
I am concerned about the world we leave behind
- China: 51%
- India: 82%

I like to learn about foreign culture(s)
- China: 79%
- India: 89%

We need to fix the problems in our community
- China: 59%
- India: 84%

I often find myself in a leadership position
- China: 39%
- India: 65%

I consider myself a spiritual person
- China: 76%
- India: 45%

■ China   ■ India

Ensure these top sources of graduate program information are updated and engaging

China

Pie chart (China):
- Education Agent 60%
- Institution Website 52%
- Friends/Family 42%
- Social Media 39%

India

Pie chart (India):
- USNWR 41%
- Institution Website 82%
- Friends/Family 49%
- Other Online 38%
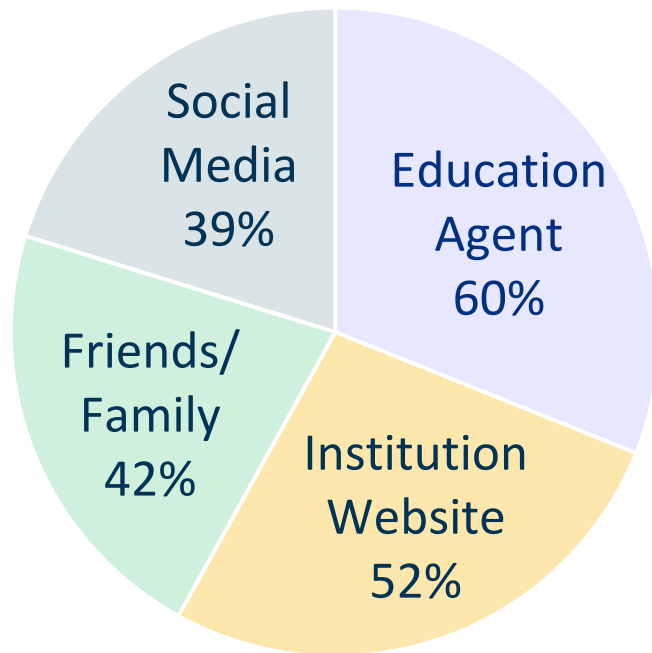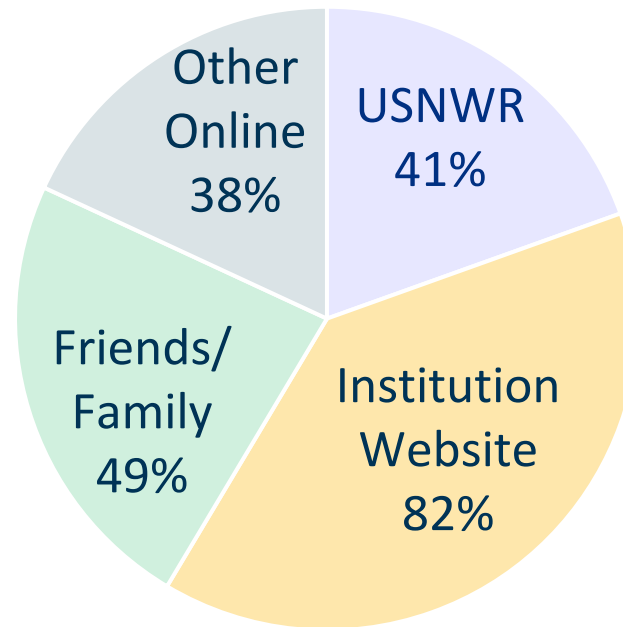
- The institution website is a key resource for learning about graduate programs. Infusing messaging around passion and purpose may help engage international candidates.
- In China, fostering relationships with education agents who can recommend your programs is key.
- In India, *US News & World Report* still serves as a prominent and credible source for key institution information and rankings.
- Social media usage is pervasive, with 90% of Chinese test takers and 77% of Indian test takers say they use social media daily.

Varying promotional channels is key to reaching global audiences

China

WeChat	92%
QQ	61%
Zhihu	60%
Sina Weibo	58%
QZone	16%
YouTube	30%
Instagram	22%
X (Twitter)	20%

India

WhatsApp	92%
YouTube	84%
Instagram	72%
LinkedIn	66%
Facebook	47%
Quora	39%
X (Twitter)	31%
Reddit	24%

Source: Unpublished 2021 GRE market research study. For China, n=203. For India, n=439.

Country "X" Prospect Profile

This is an example of a profile for illustrative purposes. Creating profiles like this can help your programs and recruitment teams keep in mind the end consumer of their ads, emails and other communications.
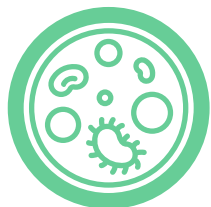
Demographics

68% Female

57% 18-24

66% First Gen

Intended field
Top two areas

28% Life Sciences

28% Social/Behavioral Sciences

Top motivations for grad school

27% Do work they are passionate about

13% Career advancement

12% Required for job I want

Top sources for program information

65% University Website

6% InternationalStudent.com

5% U.S. News & World Report

Notable values

87% Say that they are concerned about the world we leave behind for the next generation

Activities of interest
Top two daily activities

76% Use social media

49% Ride a bike
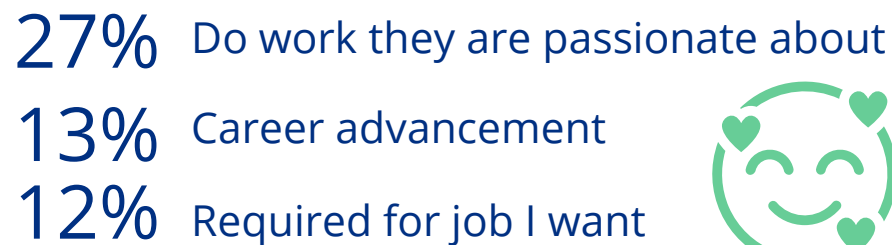
Social media habits
Most used social media sites

45% Instagram

36% Quora

13% YouTube

Most data that you'll need to create similar profiles is free

- National data
  - National Student Clearinghouse
  - CGS/GRE Survey of Graduate Enrollment and Degrees
- Open Doors annual report
- Institutional census
- Institutional research
- Student surveys
- Enroll/decline surveys (why applicants decided to enroll or not enroll)
- Questions on your website that start to ask questions about motivations (upskill/change careers), barriers, etc.

GRE Search Service helps you find and connect with international prospects

- **Searchable database:** Filter by 30+ criteria — including country, academic performance, intended graduate major and location where they would like to study.

- **Large international population:** 72% of students in the database have citizenship outside of the United States, and it's updated weekly.

- **Cost effective:** Just $1.25 per contact

- **Programs do not need to require GRE scores to use the search service**

Maximize recruitment success with the **GRE Search Service**

holisticadmissions.org/recruitment

Thank you for your interest!

Questions?

Comments?

Requests for encore presentations?

Email us at
info@holisticadmissions.org.

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