

Ukrainian International Students: Seeking a Ticket to the Top, Not a Ticket Out

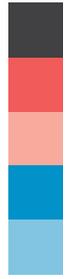
Overview of the Market for International Students in Ukraine



SPECIAL REPORT
FALL 2016

U.S. COMMERCIAL SERVICE KYIV

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The U.S. Commercial Service in Kyiv's (CS Kyiv) Overview of the Market for International Students in Ukraine, "Ukrainian International Students: Seeking a Ticket to the Top, Not a Ticket Out," was developed in the summer of 2016 to provide U.S. educational institutions with information to consider in recruiting Ukrainian students. CS Kyiv produced this report in cooperation with EducationUSA and dozens of domestic recruiting agents to provide real-time information on market trends and the preferences and decision-making processes of prospective students in Ukraine.

This report includes multiple data rich sections. First is an overview of Ukraine's education sector, with insights about the drivers of increased numbers of international students from Ukraine. Next, the report includes information about Ukrainian student enrollment in international institutions. The heart of the report includes the key findings of a survey of nearly 1000 students and a survey of 39 recruiting agents regarding the demand for study abroad programs. This report ends with insight from recruiting agents on the competition for U.S. institutions. Altogether, this information tells a story of students in search of internationally recognized degrees and practical skills that will catapult them to the top of Ukraine's workplace.

Most of the data presented in this report are from an online student survey conducted in cooperation with EducationUSA and an online survey of domestic recruiting agents. CS Kyiv and its partners collected responses from May 16 to July 1, 2016. A cross-section of respondents was sought to provide readers with an understanding of the Ukrainian market from the viewpoint of both prospective and former students and small and large recruiting agents.

Special Thank You

Olga Vashchenko of the U.S. Commercial Service in Kyiv for her contributions to data analysis and infographic design.



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"In learning, you will teach, and in teaching, you will learn." - Phil Collins

Welcome to this special report prepared by CS Kyiv, an agency dedicated to delivering services and information that ensure that U.S. businesses can compete and win in the global marketplace. The goal of this report is to provide U.S. educational institutions with insights regarding the demand and key drivers of study abroad programs among Ukrainians.

The U.S. international education sector is one of the most prosperous in the world. Last year nearly a million international students selected the U.S. as their study destination and contributed more than \$30 billion to the U.S. economy. Despite its leading position in education, the U.S.' share of international students has declined from 28 to 22 percent over the last fourteen years (Institute for International Education (IIE), Project Atlas 2015). The Organization for Economic Co-operation and Development (OECD) predicts that by 2025 eight million students will be globally mobile versus 2.1 million students in 2000. Therefore, today many U.S. colleges

and universities have begun looking for recruitment opportunities outside of the traditional top markets of China, India, and South Korea (ITA, 2016 Top Markets Report, Education).

Ukraine is a destination for U.S. schools to explore when seeking to diversify their campuses with well-educated students, particularly in the areas of math and science. The country possesses tremendous untapped human capital and despite its recent political and economic challenges, the number of Ukrainians studying abroad has increased by almost 80 percent over the last five years. Motivated by the desire to rebuild their country as it joins the European Union (EU), Ukraine's younger generations are seeking new knowledge, best practices in management, foreign language fluency, and international experience to enhance their lives and compete in an increasingly competitive workplace.

We hope that you find the results of this study useful in forging new partnerships with local Ukrainian institutions and in recruiting talented students.

5.7 million students in Ukraine

Ukraine is a Potentially Rich Source of International Students in Eastern Europe - Ukraine is the largest wholly European country with nearly 5.7 million students. In addition to its territorial breadth and robust student population, it is also among the world's top ten most intellectually developed nations, ranking fourth globally in the number of people with a higher education.

The Number of Ukrainian International Students has Grown Steadily since 2009

- The combination of talented high school graduates, largely uncompetitive domestic universities, and demand for graduates with workplace skills has led to increased numbers of international students from Ukraine in the last five years, reaching 47,000 students in more than 30 countries in 2014.

The U.S. Ranks among the Most Attractive Countries for Ukrainian International Students - While the U.S. ranks high on the lists of all groups surveyed in this report, America's exact ranking varies by audience. For prospective students the most popular destinations are the U.S., followed by Canada, the U.K, and Western Europe. In contrast, the top destination for former international students includes Western Europe, followed by the U.S., and Eastern Europe. According to agents, Ukrainians are most interested in studying in Eastern Europe, followed by Canada, and then the U.S.

Recruiting Agents Say that U.S. is Increasingly Popular among Ukrainian International Students - Though agents do not rank the U.S. as the most favored

destination, they do say interest in the U.S., along with Western Europe, is on the rise. On the other hand, interest in Canada is stable, and interest in Australia is declining. Half of the agents surveyed in this report predict a significant or slight increase in demand to study in the U.S. in 2016.

Country Choices Depend on Career Development Support and the Reputation of a Country's Overall Education System

- When it comes to the reasons prospective students select countries, the top reasons include a country's reputation for helping a student with career preparation and the strength of a country's overall education system.

Potential Students Compare Schools Based First on Quality and then on Cost

- When comparing schools the most important factor for most Ukrainians is the quality of education, followed closely by cost. Because tuition is a major factor, prospective students plan to use a variety of means to pay for their education, including scholarships, income from part-time jobs, and family savings.

Master's Degrees, English Courses, and Bachelor Degrees are the Most Popular Programs among Prospective Students

- Nearly four in ten prospective students seek master's degrees, another two in ten seek intensive English courses, and less than two in ten seek bachelor degrees. The percentage of potential students interested in graduate programs and community colleges is two times as high as those who previously studied in these programs in the last five years.

Relatively Low Levels of English Language Proficiency in Ukraine Fuel Interest in English Courses - The percentage of students interested in intensive English language courses is also twice as high as the number of returning students who report previously participating in these programs. Recruiting agents say that this is due to overall low levels of English language proficiency in Ukraine, which ranks 44 among 63 countries in English language proficiency.

Agents Say that Canada and the U.K. are the U.S.' Top Competitors - According to agents, Canada is the U.S.' primary competitor in recruiting Ukrainians to study in primary and higher education programs, whereas the U.K. is the major competitor for language schools and programs. One of the main reasons Canada is the U.S.' primary rival is because Canadian schools and universities have intensively promoted their programs in Ukraine for the last five years. As for U.K.'s popularity, the shorter distance from home likely plays a significant role in attracting short-term language students.

The Major Obstacles for Studying Abroad are Cost, Domestic Economic Problems, and Visa Issues - Nearly all (90 percent) of prospective students said that the cost of education is a challenge. After this, the biggest challenges include domestic economic problems and problems obtaining visas. Obtaining a visa seems to be especially difficult for students with only a specialist degree.

Lack of High - Quality Business Education Program in Ukraine Makes it the Number One Field of Study for Former and Future International Students - When comparing prospective and former international students both groups prioritize business programs. Beyond this, however, the two groups diverge. Prospective students favor engineering/computer science, law, and intensive English languages more than their predecessors.

Foreign Education Institutions Commonly Partner with Local Recruiting Agents in Ukraine - There are many recruiting agents in Ukraine and numerous small agencies dominate the market. Last year, most agents recruited up to **20 students to study in America**. Only one in ten agents participating in the survey said they recruited more than forty students to study in the U.S. Most agents concentrate their efforts on serving students who plan to use their parent's income or personal savings to pay for their education.



Among international student markets, Ukraine is among the largest and most talented. After decades of standing in Russia's shadow, Western institutions are gradually taking more notice of Ukraine - the largest wholly European country with nearly 5.7 million students. In addition to Ukraine's territorial breadth and robust student population, it is also among the world's top ten most intellectually developed nations. It ranks fourth in

the world in the number of people with a higher education, and the literacy rate is 100 percent among its youngest generations.

According to the World Economic Forum's Global Competitiveness Report, Ukraine ranks 31 out of 144 countries in primary school enrollment, 41st in secondary education, and 13th in higher education. Figure 1 provides a breakdown of Ukraine's student population by type of school.

Figure 1: 2015/16 Student Enrollment in Ukraine by School Level

Type of School	Program Length	Number of Schools	Number of Students, 2015/2016	Government Spending on Education, %
Primary & Secondary School	11 years	17,337	3,783,150	62
Vocational School	2-4 years	798	304,100	8
Higher Education	4-6 years	659	1,605,300	30

Even though Ukraine lags behind its Eastern European neighbors in per capita Gross Domestic Product (GDP), its national commitment to education, measured by education spending as a percentage of total GDP, exceeds most European nations. Between 2007 and 2014, Ukraine's total government expenditures on education ranged from 6.2 to 7.4 percent of GDP. Even during the worst of times in 2015 when education spending fell to 5.4 percent of GDP, its allocation still exceeded other Eastern European nations, where average education spending is 4.7 percent of GDP¹. Though Ukraine has a lot of catching up to do regarding total investment in education, these statistics demonstrate the cultural value the country places on education.

Like many countries of the former Soviet Union, following the fall of the Berlin Wall Ukraine's distribution of education spending began to favor primary and secondary education. During this period, Ukraine's secondary schools have continued to produce

talented students, particularly in the areas of math and science. A new report released by the OECD ranked Ukraine's educational system 36 out of 76 countries participating in the study². Ukraine's ranking is highlighted by the performance of its students in international high school Olympiads. In 2016, Ukrainian students won a total of 13 medals including one gold medal, three silver medals, and one bronze medal at the International Physics Olympiad in Zurich; and two silver and four bronze medals at the International Math Olympiad in Hong Kong. A better comparative assessment of Ukrainian student performance will be available in 2018 when its high school students participate in the Program for International Student Assessment (PISA) tests for the first time. PISA is a triennial international survey which aims to evaluate education systems worldwide by testing the skills and knowledge of 15-year-old students. To date, students representing more than 70 economies have participated in the assessment.

As Ukraine transitioned to a new funding model for education, which favors public funding for primary and secondary education, Ukrainian universities experienced a sharp decrease in funds and struggle for survival. To compensate for reduced public funding, in the 1990's Ukrainian universities introduced tuition-based education, shifting some education costs to students and their parents. Unfortunately, universities did not invest these revenues in quality improvements (e.g. infrastructure, library resources, research laboratories, teacher salaries, etc.). Instead many focused on pumping up enrollment numbers and became "degree mills" plagued by heavy corruption³. As a result, today Ukraine hosts 288 higher education institutions (more per capita than any European country), but none of them are listed among the top 400 universities in the 2015/16 QS World University Rankings[®].

Given the lack of high-quality universities in Ukraine, employers report that many graduates lack the practical knowledge, and soft skills required of the workforce. According to a study of Ukrainian employers' views on the quality of higher education⁴ by the Kyiv International Sociology Institute, businesses currently face a gap between university graduates' theoretical knowledge and the actual skills required by employers. The study's results reveal that when starting their careers 46 percent of students lack foreign language skills, 38 percent lack problem-solving skills, 25 percent lack practical professional skills, 13 percent lack management and customer relations skills, and nine percent lack analytical skills.

Leading Ukrainian and U.S. companies frequently echo this sentiment to CS Kyiv during client counseling sessions. They state that despite an abundance of theoretical math and science knowledge, Ukrainian graduates lack sales, marketing, business administration, and entrepreneurship skills. Given this mismatch between the skills supplied by Ukraine's universities and the demands of the marketplace, it is unsurprising that CS Kyiv's survey results show that Ukraine's international students are most likely to choose business education programs. Internationally recognized degrees not only give graduates a chance to work in different countries, but also help them land top jobs at home.

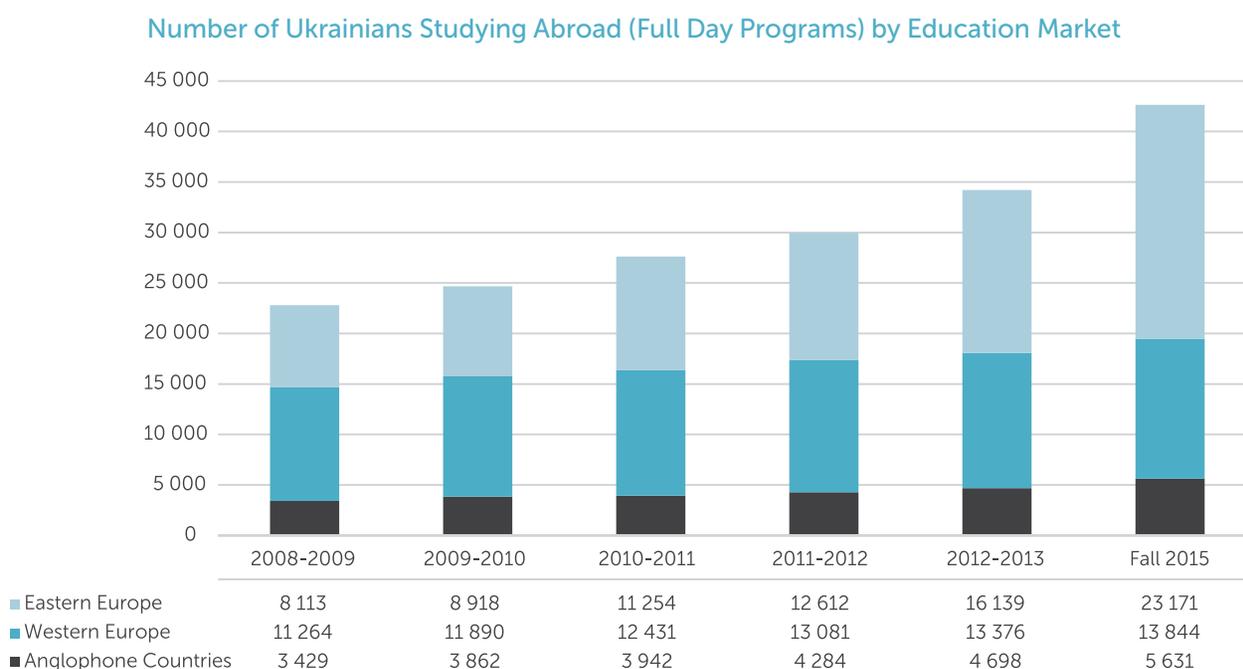


The combination of talented high school graduates, an uncompetitive domestic higher education system, and the unmet demand for graduates with adequate workplace skills creates opportunities for Western universities, as well as language study programs. As a result, the number of international students from Ukraine has significantly increased, albeit from a low base, since 2009. Between 2009 and 2014 the number of Ukrainian students studying abroad increased by 79 percent to reach 47,724 students studying in 34 countries⁵.

Eastern European countries lead in recruiting Ukrainian students, with the number of students choosing to study in this region jumping from 8,113 in 2008-2009 to 23,171 in 2015. Polish programs

especially appeal to Ukrainians because of low tuition costs, simple visa process, and the recognition of Polish degrees in the EU. Other education destinations that recently increased in popularity among Ukrainians include Australia, Canada, the United Kingdom (U.K.), Czech Republic, and Italy. According to the most recent Open Doors Report of the Institute of International Education, 1,551 Ukrainian students went to the U.S. to study in 2015, which is 5.9 percent more than in 2014⁶. According to EducationUSA, 42 percent of Ukrainians studying in the U.S. pursue bachelor degrees, 41 percent enroll in master's programs, 11 percent take optional practical training, and five percent go for non-degree programs.

Figure 2: Trend in the Number of Ukrainian International Students (Full Day Programs) by Education Market



Even though Ukraine lags behind its Eastern European neighbors in per capita Gross Domestic Product (GDP), its national commitment to education, measured by education spending as a percentage of total GDP, exceeds most European nations. Between 2007 and 2014, Ukraine's total government expenditures on education ranged from 6.2 to 7.4 percent of GDP. Even during the worst of times in 2015 when education spending fell to 5.4 percent of GDP, its allocation still exceeded other Eastern European nations, where average education spending is 4.7

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Thanks to Shorelight Education, details about where Ukrainian students who pursued education in the U.S. from 2013 to 2014 came from, went to, and what they studied is provided below in the figures below⁷.

Figure 3: Origination of Ukrainian International Students Studying in the U.S. in 2013-2014

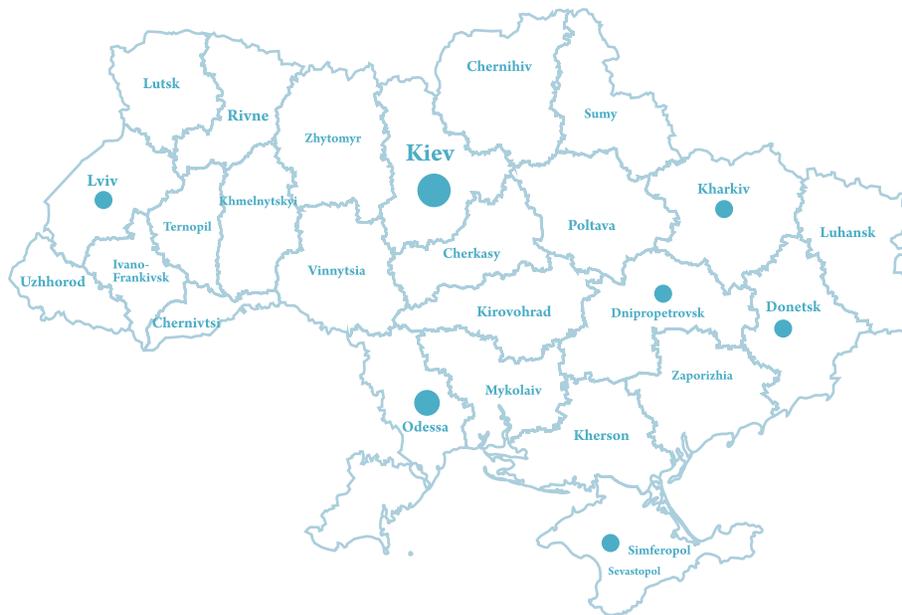


Figure 4: Type of Program Attended in the U.S. by Ukrainian International Students by City of Origin in 2013-2014

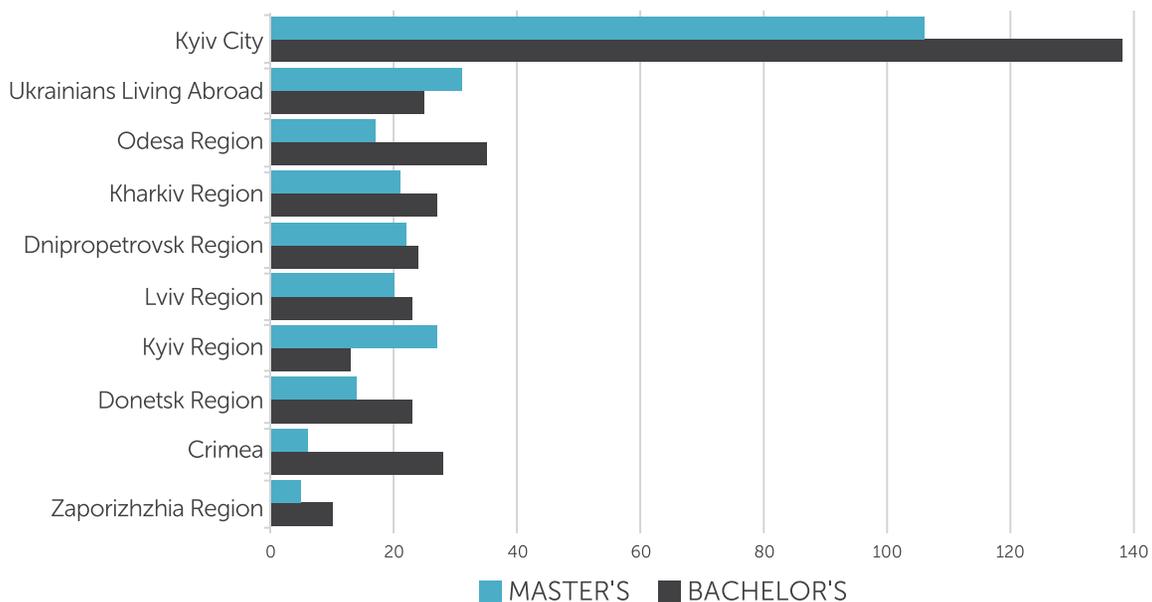


Figure 5: Top States for Ukrainian International Students Studying in the U.S. in 2013-14

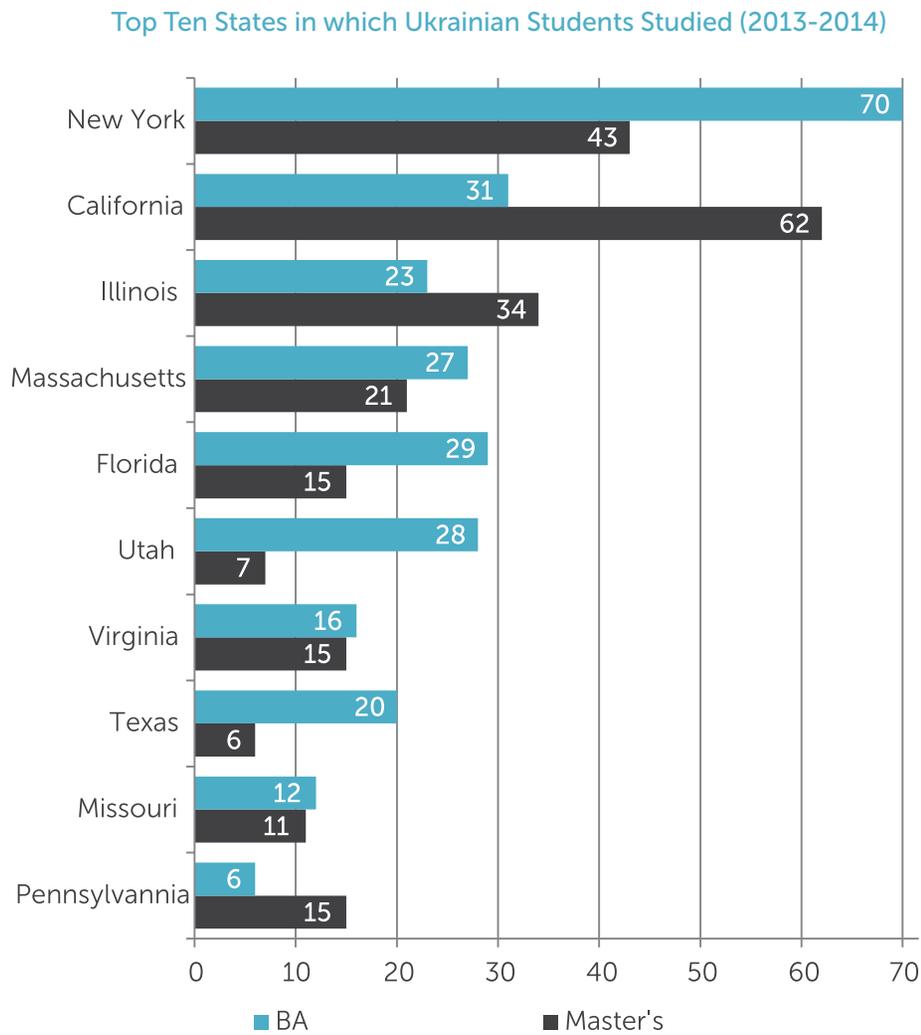


Figure 6: Popular Disciplines among Ukrainian International Students Studying in the U.S. in 2013-2014

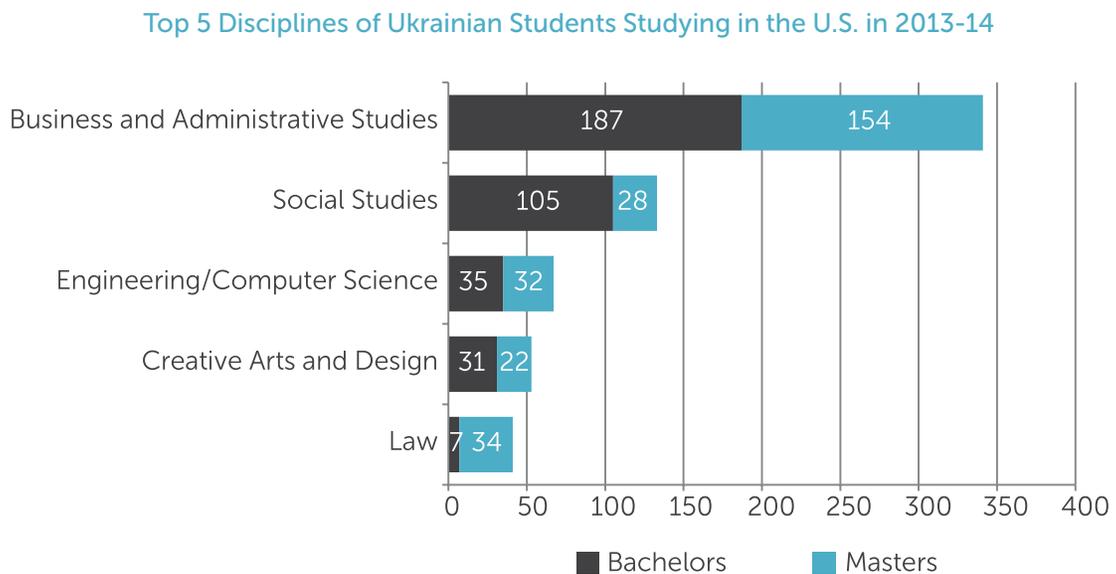


Figure 7: U.S. Universities Enrolling Five or More Ukrainian Students in 2013-2014



U.S. Universities Enrolling Five or More Ukrainian Students

University	Number of Students Enrolled 2013-14
The City University of New York	26
Hult International Business School	20
Dixie State University	16
New York University	15
Brigham Young University	12
Illinois Institute of Technology	12
Northeastern University	11
Roosevelt University	11
Southeast Missouri State University	11
State University of New York	9
Utah Valley University	8
University of Miami	8
University of South Florida	7
New York Film Academy	7
St. Sophia Ukrainian Orthodox Theological Seminary	7
Touro College	6
Columbia University in the City of New York	6
DeVry University	6
Indiana University	6
Lynn University	6
University of California at Berkeley	6
Grand Canyon University	5
Long Island University	5
The University of Texas at Arlington	5
The University of Virginia	5
University of Minnesota	5
Wilmington University	5



From May 16 until July 1 the U.S. Commercial Service in Kyiv (CS Kyiv) conducted two concurrent online surveys regarding the demand for study abroad programs – one among Ukrainian students and one among Ukrainian education companies (i.e. agents). The primary goal of these surveys was to understand the demand for and major drivers of study abroad programs among Ukrainians. All answers to the survey were anonymous.

| Student Survey

CS Kyiv distributed a survey to Ukrainian students via EducationUSA, its network of recruiting agents, and multiple Facebook promotions on the U.S. Embassy in Kyiv’s Facebook page. 164 recent international students and 795 prospective international students replied. The survey consisted of 17 questions for recent students and 20 questions for potential students.

The ages of total respondents is well distributed, with nearly two in ten (19 percent) respondents between the ages of 15-18 years, three in ten (30 percent) between the ages of 19-24 years, two in ten (21 percent) between the ages of 25-34 years, and slightly more than two in ten (24 percent) between the ages of 35 and 44 years. Nearly a third (32 percent) of respondents is from the Kyiv region, 15 percent from the Lviv region, and nine percent from the Kharkiv region. One-third of respondents are currently students and two-thirds are not. The majority of respondents (66 percent) is currently enrolled in undergraduate degree programs, and one-fourth (25 percent) is enrolled in master’s degree programs. Three in ten of all respondents already have a master’s degree, and nearly another three in ten (28 percent) have a specialist’s degree.

To determine if there are major differences among prospective international students with demonstrated intentions versus aspirations, CS Kyiv asked students about their plans to take an international entrance exam (such as the TOEFL, IELTS, or SAT) in the next two years. Nearly one-third of prospective students (32 percent) responded that they had already taken an exam or scheduled an exam. CS Kyiv notes in the findings below when the responses of this subset of prospective students (e.g. test takers) differ notably from students who have not taken or scheduled an exam.

While the survey sample is not representative of the Ukrainian population, the volume of responses among prospective students is large enough for CS Kyiv to note when statistically significant differences among some groups of respondents occur. Most of these differences relate to age, for which the respondents are evenly distributed among different age groups. Some differences also relate to region, but readers should note that among Ukraine’s major regions, respondents from Kyiv and Lviv are over-represented, while respondents from Kharkiv, Odesa, and Dnipro are under-represented.

| Recruiting Agent Survey

CS Kyiv also sent a survey regarding demand for study abroad programs to 67 education recruiting agents in Ukraine and 39 responded to the survey. The complete demographic details of the education agents who responded are in Appendix 2. These details show that the overwhelming majority of respondents (74 percent) have headquarters in Kyiv. One in four respondents (26 percent) has representative offices in Odesa and nearly two in ten have offices in Kharkiv, Dnipro, and Lviv. Two-thirds (67 percent) have ten or fewer employees.

Most respondents recruit students for a wide variety of educational programs. All report recruiting students for language courses, more than nine in ten (92 percent) recruit students for bachelor programs and university preparation programs, and nine in ten (90 percent) recruit students for master's programs. Nearly eight in ten (80 percent) recruit students for private high schools and seven in ten (72 percent) recruit students for community colleges. Virtually all agents (97 percent) recruit for Canada, the U.S., and the U.K. Ninety percent recruit for Western Europe countries, 55 percent for Australia, and 45

percent for Eastern Europe countries.

In follow-up interviews with market leaders, CS Kyiv confirmed that the survey respondents' characteristics are representative of the market. More specifically, most agents in Ukraine are small privately owned companies employing up to ten employees. Middle-sized companies are considered those with between eleven and 30 people on staff. A large company typically has more than 30 employees. Market leaders also confirmed that most companies have headquarters in Kyiv and that large companies typically have branch offices in Ukraine's major cities (Kharkiv, Odesa, and Dnipro), and recruit for most major markets (e.g. Canada, the U.S., and U.K.) simultaneously.

In the analysis below, agents' responses are compared to students' responses for similar questions. Agents' responses to business-to-business specific questions are described and analyzed in a separate section (Agents' Insights)



| Preferences and Trends

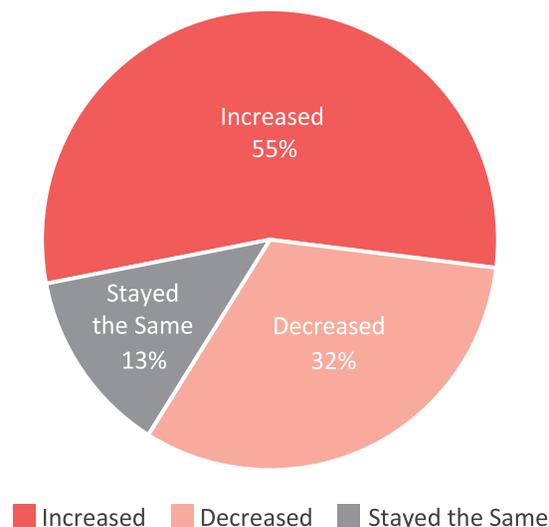
| Overall Interest in International Education

Of the students who have not already studied abroad in the past five years, 70 percent report that they plan to study abroad in the next three years. Seven percent of these prospective students (63) have already taken an international exam like the TOEFL, IELTS, or SAT, and another 23 percent (183) have scheduled an exam. Because this is the first year of this survey, CS Kyiv turned to recruiting agents to determine if these interest levels indicate year-over-year growth, decline, or stabilization in the 2015/16 school year. Their responses were mixed.

More than half (55 percent) of the recruiting agents indicated that interest in studying abroad grew by an average 37 percent among Ukrainian students. Nearly another third (32 percent) reported that interest fell by an average of 26 percent. Agents experiencing growth say it was due to increased awareness of international educational programs and the favorable perceptions regarding the return on investment in an international education. Agents experiencing a decline in interest say it was due to the increasing cost of living and tuition fees abroad as well as the poor economic situation in Ukraine. While it is impossible to predict the future, historical growth trends combined with the positive experience of the most agents probably mean that student interest in international education is indeed growing.

Figure 8: Agent Survey: Has the Number of Students Interested in International Education Increased, Decreased, or Stayed the Same in the Last 12 Months?

Changes in Ukrainian's Interest in International Education in 2015



| Favored Destinations

"I would like to study only in the United States, where there is the world's best education. An education from the U.S. will maximize my ability to help my country stand among the largest economies in the world." - Prospective student from Odesa Oblast, 45-54 years old

The student survey results show that the most attractive countries for prospective students are the U.S., Canada, U.K, and Western Europe. One prospective student said, "I would like to study in the U.S. because it is a country of opportunities and dreams for the person who knows what she wants out of life and is willing to work hard to achieve their goals." Students that selected Canada said the reasons include the number of schools, affordable tuition, and the Ukrainian diaspora in Canada. One student chose Germany due to its "strong, streamlined system of studying social sciences."

Figure 9: Student Survey (Prospective Students) - Please Rank the Attractiveness of the Following International Education Destination (1 is the Most Attractive and 7 is the Least Attractive)

Destination	Average Rank
U.S.	2.71
U.K.	3.42
Canada	3.51
Western Europe	3.50
Australia	4.47
Eastern Europe	4.75

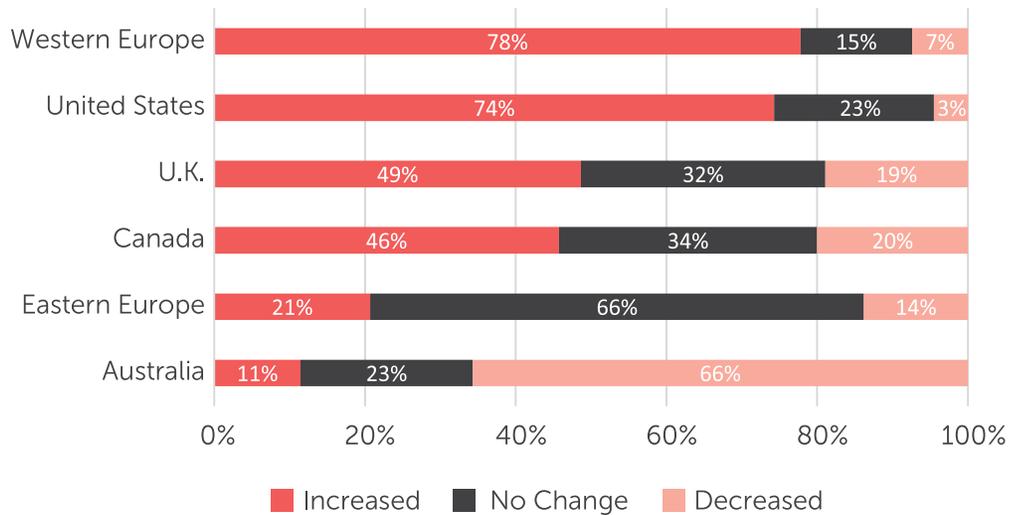
In contrast to the preferences of prospective students, the top destination for the recent international students surveyed includes Western Europe (32 percent), followed by the U.S. (29 percent), and Eastern Europe (14 percent). Among these former international students, half of the 25-34-year-olds studied in Western Europe, compared to the survey average of 32 percent.

Compared to potential and former students, educational agents hold another opinion about the most popular destinations. According to agents, Ukrainians are more interested in studying in Eastern European countries, followed by Canada, and then the U.S. One student who named Eastern Europe as his top destination said it was because of similarities in language and mentality. While agents did not name the U.S. as the most favored destination, they do say interest in the U.S., along with Western Europe, is on the rise, while interest in Canada is stable, and interest in Australia is declining.



Figure 10: Agent Survey – What Tendencies Do You Observe in the Students’ Interest in Various Countries/Destinations?

Dynamics in Ukrainians’ Interest in Different Education Markets



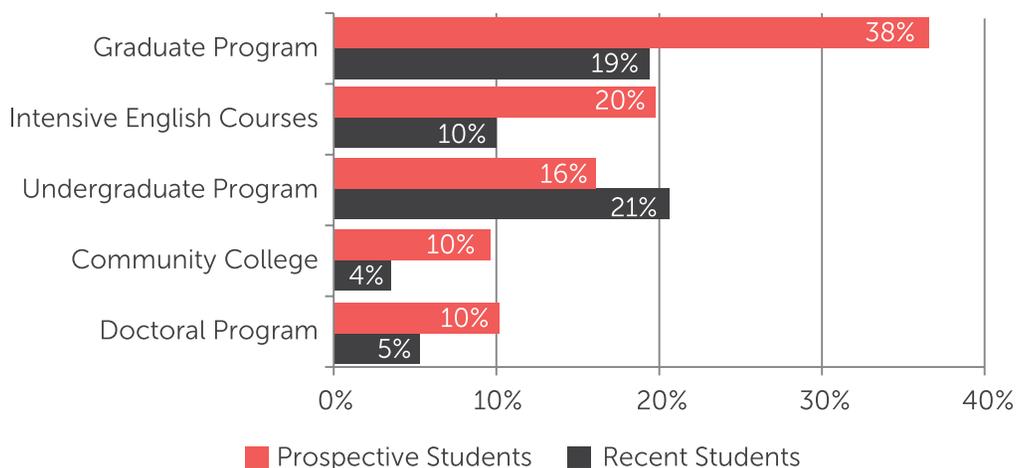
Historical trends in the numbers of students studying in various destinations partially support the agents’ views that interest in Eastern Europe is likely to increase in popularity. As Figure 2 in the previous section illustrates, the top destinations for Ukrainian students over the last decade were Eastern Europe (especially Poland) and Western Europe (especially Germany), with Eastern Europe clearly on the rise.

| Favored Degree Type

Nearly four in ten prospective students (38 percent) seek master’s degrees, another two in ten (20 percent) seek intensive English courses, and less than two in ten (16 percent) seek bachelor degrees. These preferences demonstrate a recent shift in market demand because former students sought a more evenly distributed range of degrees. One in five (21 percent) of former students sought bachelor’s degrees, roughly another one in five (19 percent) sought master’s degrees, and less than two in ten (17 percent) sought intensive English courses.

Figure 11: Student Survey (Prospective vs. Recent Students) – What Type of International Program/Degree Would You Like to Attend/Obtain?

Program Types Most Favored by Ukrainians



Unsurprisingly, the level of education sought increases with age. Younger students are more interested in bachelor's degrees (45 percent of 15-18-year-olds seek bachelor's degrees). Students in their early twenties are most interested in graduate degrees (69 percent of 19-24-year-olds seek graduate degrees versus the survey average of 38 percent). Nearly three in ten (27 percent) of 25-34-year-olds seek doctoral degrees, compared to the survey average of ten percent. Other significant differences among prospective students are based on current levels of education and follow predictable patterns (e.g. high school graduates are most interested in community colleges and undergraduate programs, while students with master's degrees are most interested in doctoral programs).

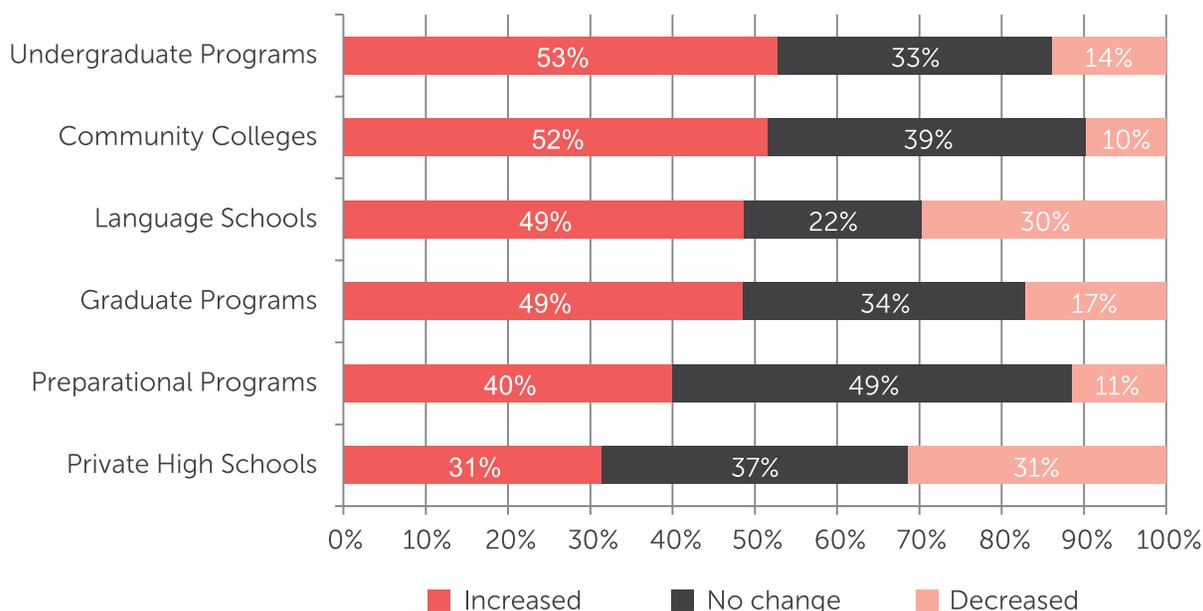
The most interesting findings of program types relate to intensive English courses. Ukraine ranks 44 among 63 countries in English language proficiency and this relatively low level of English proficiency explains why this program is

so popular among prospective students. Intensive English language courses are sought most by 35-44-year-olds (46 percent in this age group seek language courses, versus the survey average of 21 percent) and respondents with specialist degrees (43 percent). Interest in these courses also differs by region, with lower interest in Kyiv and higher interest in Lviv (25 percent of respondents from Lviv and 14 percent of respondents from Kyiv seek intensive language courses). According to experts, the reason demand for English programs is lower in Kyiv is because there are significantly more opportunities to study English in Kyiv versus the regions.

From recruiting agents' perspectives, they observe that the top programs of interest among Ukrainians are undergraduate and graduate programs, language schools, and community colleges. The number of students seeking these programs is increasing, and interest in international preparation programs and high school is decreasing.

Figure 12: Agent Survey – What Tendencies Do You Observe in Students' Interest in Various Degrees/Programs?

Dynamics of Ukrainian Student Interest in Various Degrees/Programs



"I want to study in the U.S. I'm developing software and want to learn to build full cycle products, not simply develop pieces of software." - Prospective student from Lviv Oblast, age: 25-34 years old

"I want to study in the U.S., U.K. or Switzerland because of the high quality and ratings of MBA programs." - Prospective student from Kyiv Oblast, age: 25-34 years old

Prospective international students are most interested in studying business administration, engineering/computer science, law, intensive English, and languages. Among different groups of respondents, answers differ slightly depending on the student's current level of education. Nearly one in four (26 percent) respondents who already have bachelor degrees says they are interested in engineering and IT programs, compared to the survey average of 15 percent. When comparing prospective to former international students, both groups prioritize business programs, but the prospective students favor engineering/computer science, law, and intensive English languages more than their predecessors.

**Figure 13: Student Survey (Prospective and Former Students)
– What Discipline Would You Like to (Did You) Study Overseas?**

Discipline	Prospective International Students	Former International Students
Business and Administrative Studies	18.90%	19.30%
Engineering/Computer science	14.70%	8.10%
Law	8.80%	4.30%
Intensive English	8.60%	2.50%
Languages	8.10%	10.60%
Social Studies	7.70%	14.90%
Other	7.60%	18.60%
Creative Arts and Design	7.00%	1.90%
Medicine and Dentistry	6.30%	3.10%
Education	3.10%	5.60%
Agriculture	2.00%	0.60%
Biological Sciences	2.30%	2.50%
Historical and Philosophical Studies	2.20%	3.10%
Architecture, Building, and Planning	1%	3.10%
Mathematics	0.70%	1.90%
Veterinary Science	0.70%	0%



| Student Decision-Making Process

| Primary Selection Criteria

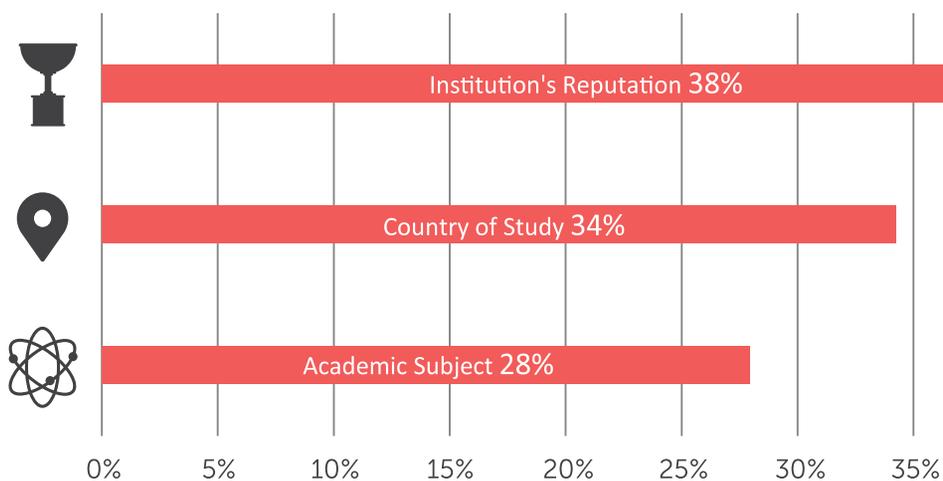
When asked which factor was the most important in selecting an international education institution, prospective students' responses are relatively evenly divided among academic subjects (28 percent of responses), the program's country (34 percent), and the institution's reputation (38 percent). The only group of prospective students that provided notably different responses was students that have already taken or planned an international exam. Nearly half (47 percent) of exam takers said that an institution's reputation was the most important factor, compared to the survey average of 38 percent. Their answers are more similar to the responses of former students. Nearly half (47 percent) of former students said that the country was the most important

factor, three in ten (30 percent) said the institution's reputation, and almost one-fourth (24 percent) said academic subject.

It is worth noting that the younger the potential student, the more important is academic subject while the older the potential student, the more institutional reputation matters. One-third (33 percent) of 15-18-year-olds and 35 percent of 19-24-year-olds say the academic subject is a driving factor, compared to the survey average of 28 percent. More than half (57 percent) of 35-44-year-olds say institutional reputation is a driving factor, compared to the survey average of 38 percent. It is also noteworthy that while students ranked country last, recruiting agents say it is one of the major factors. More specifically, students recruited by agents would like to live in popular cities.

Figure 14: Student Survey (Prospective Students) - Among the Three Factors below (Academic Subject, Country of Study, and Institution's Reputation), which is the Primary Factor in Determining Your Place of Study?

Most Important Factor for Ukrainians in Determining Where to Study Abroad

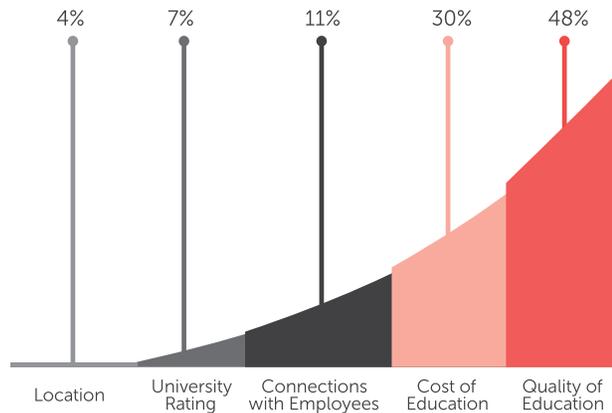


| Criteria Used to Compare Institutions

When comparing schools the most important factor for Ukrainians is the quality of education, followed closely by cost. University ratings, location, and connections with potential employers are much less important. The only group of prospective students that provided notably different responses were students that have already taken or planned an international exam. More than half (52 percent) of exam takers said that the quality of education was the most important criteria, compared to 48 percent of all respondents. Slightly fewer test takers (24 percent) said that the cost of education was their most important criteria, compared to the survey average

of 30 percent. The criteria used by former students did not significantly differ from those used by prospective students.

Figure 15: Student Survey (Prospective Students) - When Comparing Different Institutions, which Factor is the Most Important in Selecting an International Education Institution?



| Reasons for Selecting Particular Geographic Location

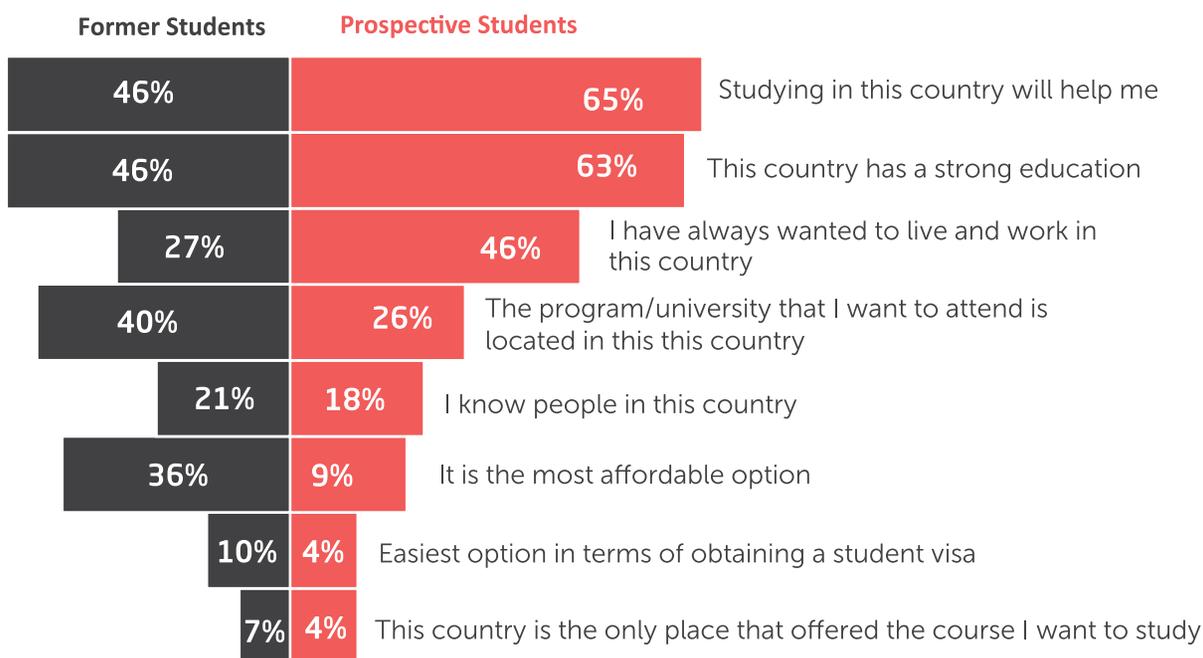
"I want to get an education in the U.S. (in media communications) because it is the most advanced country in this field. The education and experience I get there will be of the highest quality and benefit Ukraine, where I plan to apply this knowledge." - Prospective student from Kyiv Oblast, age 25-34 years old

"I want to study in a G7 country because there you can get the best political, public, and professional experience which will then help build a new Ukraine. I do not want or intend to stay abroad, but rather obtain invaluable knowledge that I can successfully apply to Ukraine." - Prospective student from Zakarpattia Oblast, age 19-24 years old

When it comes to the reasons prospective students select different geographic destinations, the top reasons include a country's reputation for helping a student with career preparation and the strength of the overall education system. Students provided many comments to this question that support these findings like: "England - because this country has the best reputation for providing educational services"; "France. The French higher education system is a perfect academic system and is also socially-oriented."; and "The United States, because there are plenty of opportunities for development." Many students also said that they want to obtain an international degree and return to Ukraine to help develop the country: "I choose the United States because this country provides a quality education in my academic area. After I receive this education and become a specialist in my field, I can help further the development of my field in my homeland."

Figure 16: Student Survey (Prospective and Former Students) –Why Would You Like to Study in the Country You Indicated as Most Attractive as an Education Destination?

Reasons Ukrainian Students Select Particular Countries in which to Study



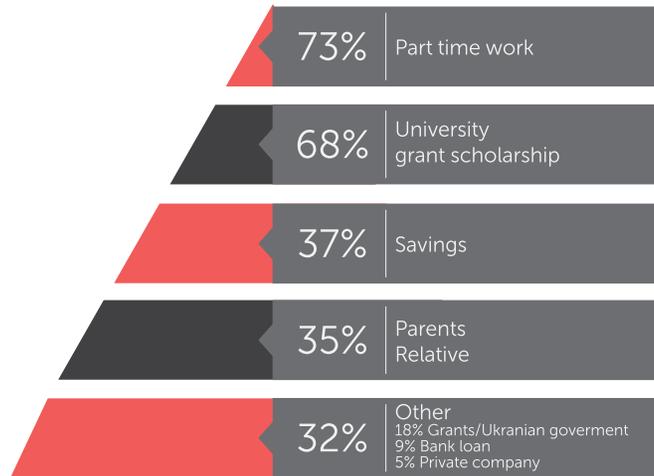
The reasons that former students selected different geographic destinations differ slightly than those of prospective students. While former students also said their top reason was the strength of the country’s overall education system, the next most popular reasons were that degrees from their country of choice would help them prepare for their careers and that the country hosted the program they wished to attend. More former students also reported that affordability was a major factor.

| Paying for School

Because tuition is one of the major factors in selecting a school, prospective students plan to use a variety of means to pay for their education, including scholarships, income from part-time jobs, and family savings. As might be expected, the younger the prospective student, the more hopeful they are of using scholarships, and the older the student the more likely they are to plan on using savings and loans. For example, compared to the survey average, significantly more 15-18-year-olds plan to receive scholarships and use parents’ funds, more 25-34-year-olds years plan to use their personal savings, and more 35-44-year-olds plan to finance their education with loans. Younger students’ hopes of scholarships are not necessarily a sign of wishful thinking. According to EducationUSA, Ukrainian students who study abroad through its programs usually receive 95-100 percent scholarships to cover their tuition and living costs. It is also interesting to note that students who have specialist degrees are the most likely to use savings to pay for their education (55 percent of students with specialist degrees say they will use personal savings, versus the survey average of 37 percent).



**Figure 17: Student Survey (Prospective Students)
– How Will You Pay for Your International Education?**

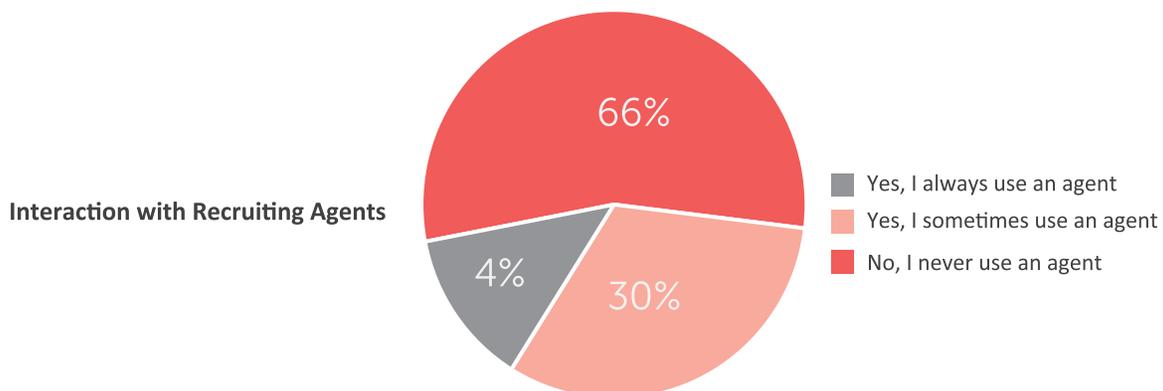


For the most part, the plans of prospective students track very closely with the experience of former students. More than half (52 percent) of former students received grants and scholarships, 41 percent used family resources, and 27 percent used personal savings. The biggest gap between the plans of prospective students and experience of former students is that far fewer former students report paying for school with income from a part time job. Whereas 73 percent of prospective students plan to work their way through school, only 23 percent of former students used income from part-time jobs to cover the cost of their education. Like many other markets, Ukrainian recruiting agents report that all of the students they serve plan to use their parent’s income or personal savings. The reason for this is that agents usually recruit students from high-income families.

| Interaction with Recruiting Agents

Because agents typically work with students who plan to pay for their education fully, it is unsurprising that only four percent of students surveyed for this report say they always use agent services. Thirty percent say they sometimes use an agent’s services, and two-thirds (66 percent) say they never use agent services. Groups of students who are least likely to interact with agents are those who plan to study either IT/engineering or law. Nearly eight in ten (77 percent) of students interested in IT/engineering and 80 percent of students interested in studying law say they never use an agent.

**Figure 18: Student Survey (Prospective Students)
- Have You Used an Agent to Support Your Research Process?**



When asked what types of students they serve by the level of education, nearly all (95 percent) of agents report that they work with high school graduates. More than a third (37 percent) serve students who have completed college prep programs, another third (37 percent) serve students with undergraduate degrees, and a third (32 percent) serve prospective students with technical degrees.

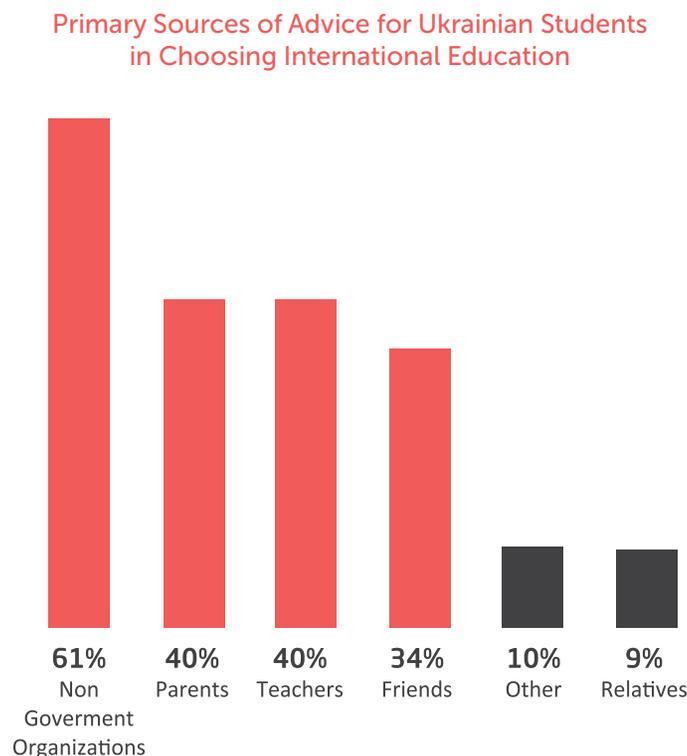
| Primary Sources of Advice

The primary sources of advice for the majority of prospective students regarding international education are non-profit organizations, teachers, and parents. Sources vary most by the age of the student, with younger prospective students naturally turning to parents more often, and older students turning to non-profit organizations and friends. Among 15-18-year-olds, parents are the primary source of advice (51 percent versus the survey average of 40 percent). For 25-34-year-olds and 35-44-year-olds, non-profit organizations are the main source of advice (70 percent of 35-44-year-olds and 67 percent of 25-34-year-olds turn to NGOs, versus to the survey average

of 61 percent). Nearly half (48 percent) of students aged 35-44 seriously consider advice from their friends, compared to the survey average of 34 percent.

One interesting finding regarding sources of advice for prospective Ukrainian students is the variance in answers by region. Significantly more students from Lviv Oblast listen to their friends' advice (43 percent versus the survey average of 34 percent). More students from Kharkiv will consider their teachers' advice (57 percent versus the survey average of 40 percent). Students from Lviv are also more likely to seek advice from their relatives, compared to the survey average of nine percent.

Figure 19: Student Survey (Prospective Students)
 – What Source of Advice Do You Turn to Most in Selecting an International Education Institution?

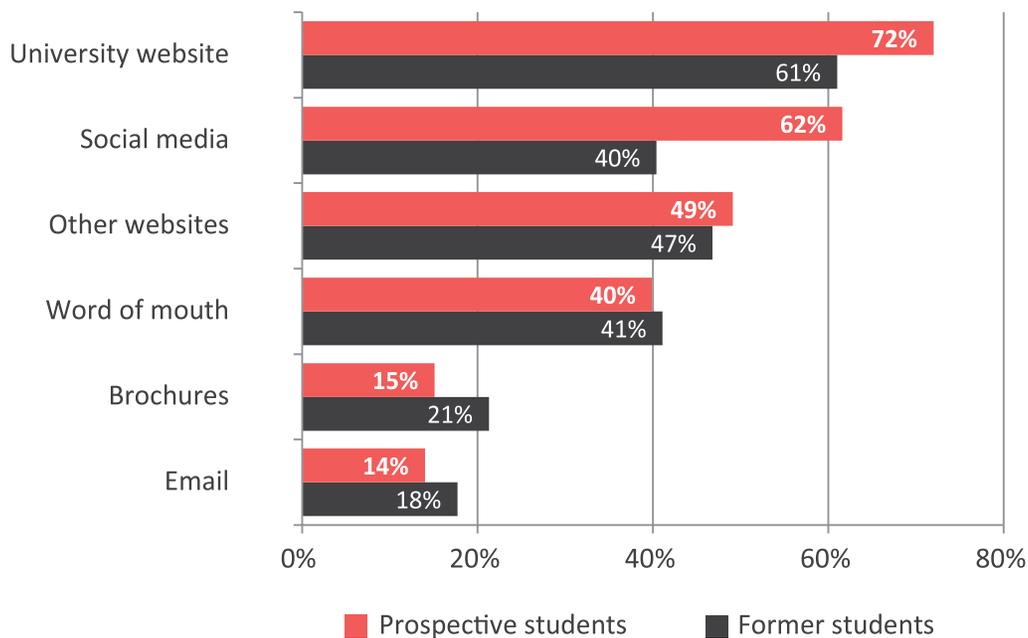


| Most Popular Information Sources

The majority of Ukrainian students report gathering information about international education programs via university websites and social media. Prospective students who already have a master’s degree are the most likely to use social media (74 percent versus the survey average of 62 percent). Students who have already taken or planned an international exam tend to rely slightly more on “other web-sites” than overall respondents (59 percent of test takers said they used other web-sites versus the survey average of 49 percent).

Figure 20: Student Survey (Prospective and Former Students)
 – Which Information Resources Do You Use to Search for Information about International Education?

Trends in Information Sources Used by Ukrainian International Students



When asked what types of information they sought, respondents placed equal emphasis on information about application processes, approximate tuition and living cost, the availability of scholarships, and detailed information about programs of study. More than seven in ten respondents said they searched for each type of information. Slightly more 15-18-year-olds say they seek information about the application process (84 percent versus the survey average of 75 percent). The least popular information was about career prospects, except 15-18-year-olds, who reported this was as important as all other types of information.



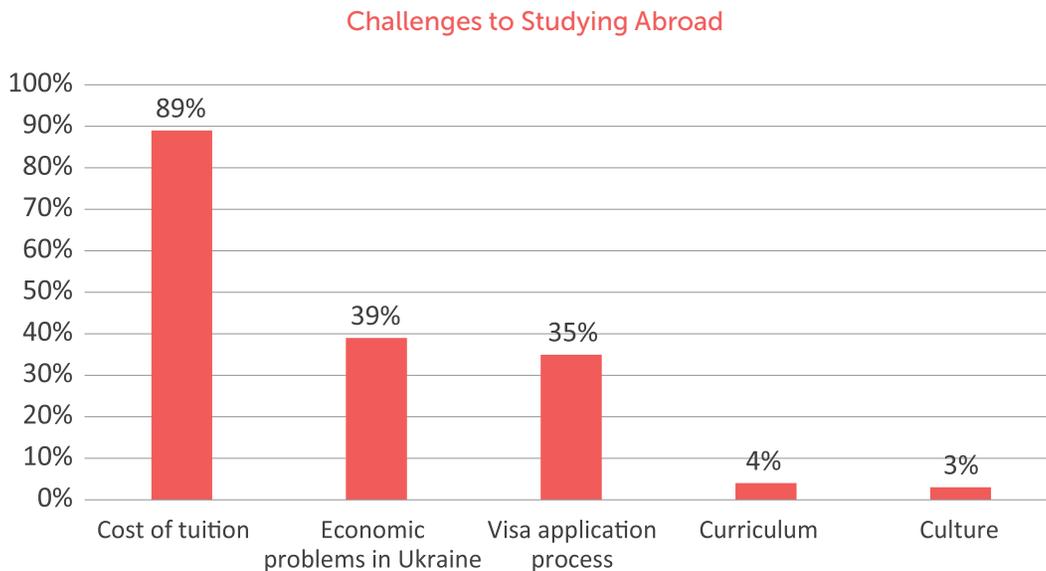
| Challenges to Studying Abroad

"Since childhood, I have dreamed of studying in the U.S. because this country is one of the most developed countries in the world that values intelligence and ability. The U.S. is a country with broad educational opportunities, where students may realize their professional potential. Unfortunately, my parents are not able to pay for this education, and this is one of the obstacles to me studying in the United States." - Prospective student from Kherson Oblast, age 15-18 years old

When asked to identify the major obstacles in studying abroad, 89 percent of prospective students said that the cost of education was a challenge. All other barriers were much less important. For example, only 39 percent of students indicated Ukraine's economic problems were a challenge and by 35 percent said that obtaining a visa was a major obstacle. Less than five percent named curriculum or cultural differences as factors. The only significant difference among respondents was for students with

specialist degrees. Four in ten (42 percent) of these students said that obtaining visas was a major obstacle, compared to the survey average of 35 percent. The answers of former students were similar in order but less severe in magnitude. More than half (58 percent) of former students said that the cost of education was a challenge, followed by 50 percent who indicated Ukraine's economic problems. Less than two in ten former respondents named curriculum, cultural differences, and obtaining a visa as factors.

Figure 21: Student Survey - What is the Primary Obstacle to You to Attend an Educational Program Abroad?



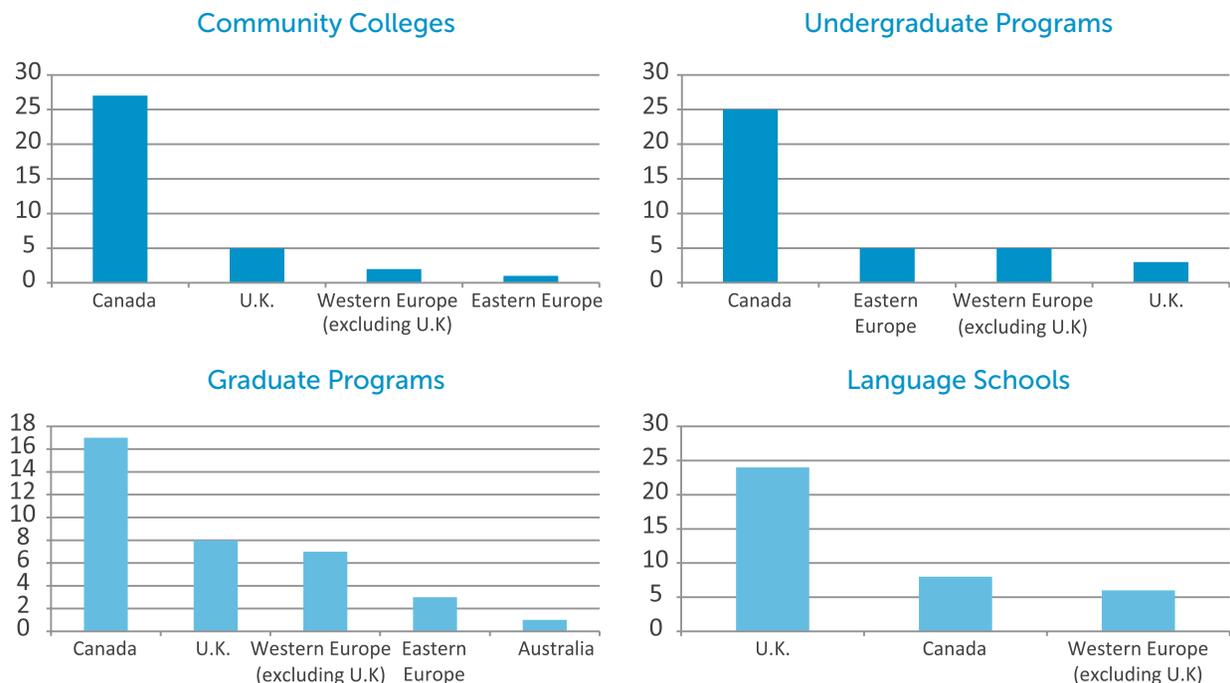


Foreign education institutions commonly partner with Ukrainian recruiting agents. As a result, there are numerous education agents in the market and their market shares are diffuse. Though the market is diversified, a few Kyiv-based companies are considered to be market leaders. These companies actively participate in ICEF events and arrange local study abroad fairs. Agents typically organize shows exclusively for their partner schools.

Competition for U.S. Educational Institutions

According to agents, the U.S.' primary competitor for students for primary and higher education programs is Canada. The U.K. is the major competitor for language programs. Figure 20 illustrates the competitive trends by program.

Figure 22: Agent Survey - In the Last 12 Months, Which Countries Were the U.S.' Primary Competitors in Each Educational Segment?



In follow-up interviews with educational agents, they said that one of the main reasons Canada is the U.S.' major rival is because Canadian schools and universities have been intensively promoting their programs in Ukraine for the last five years. Promotion tactics include various promotional events, workshops, and training for agents in Ukraine, which is actively supported by the Canadian Embassy. Other reasons for Canada's popularity are the attainable cost of education and availability of scholarships for Ukrainians.

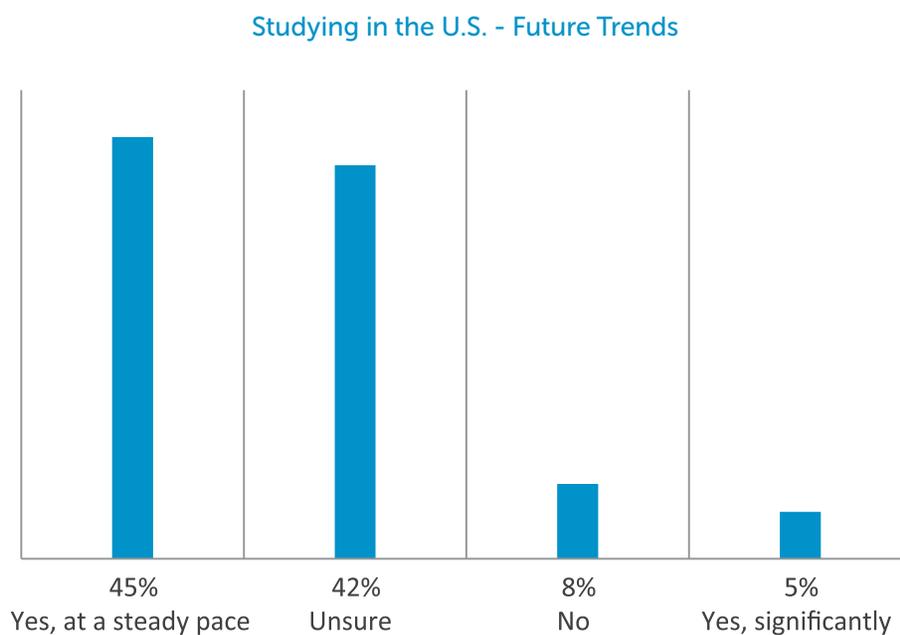
Even though Canada is an active competitor, nearly all (97 percent) agents report that they currently partner with U.S.

schools in recruiting Ukrainian students. In 2015, 72 percent of these agents recruited up to 20 students to study in the U.S., 17 percent recruited 21-40 students, and 11 percent recruited between 41-60 students. The number of students recruited does not depend on the size of the company. According to experts, the number depends most on a company's ambition and marketing strategies. Size matters more regarding product offering. Usually, big companies have several educational business lines (domestic and international), whereas small firms tend to concentrate their efforts solely on study abroad programs.

| Future Trends in Studying Abroad

As for future trends in recruiting students to study in the U.S., 45 percent of agents predict a slight increase in demand in 2016, whereas 42 percent are unsure of the trends. Only five percent expect a significant increase. Considering this data, the number of students recruited for the U.S. will most likely remain stable in 2016.

Figure 23: Agents survey - Will the U.S. International Education Market Grow among Ukrainian Students in 2016?

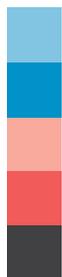
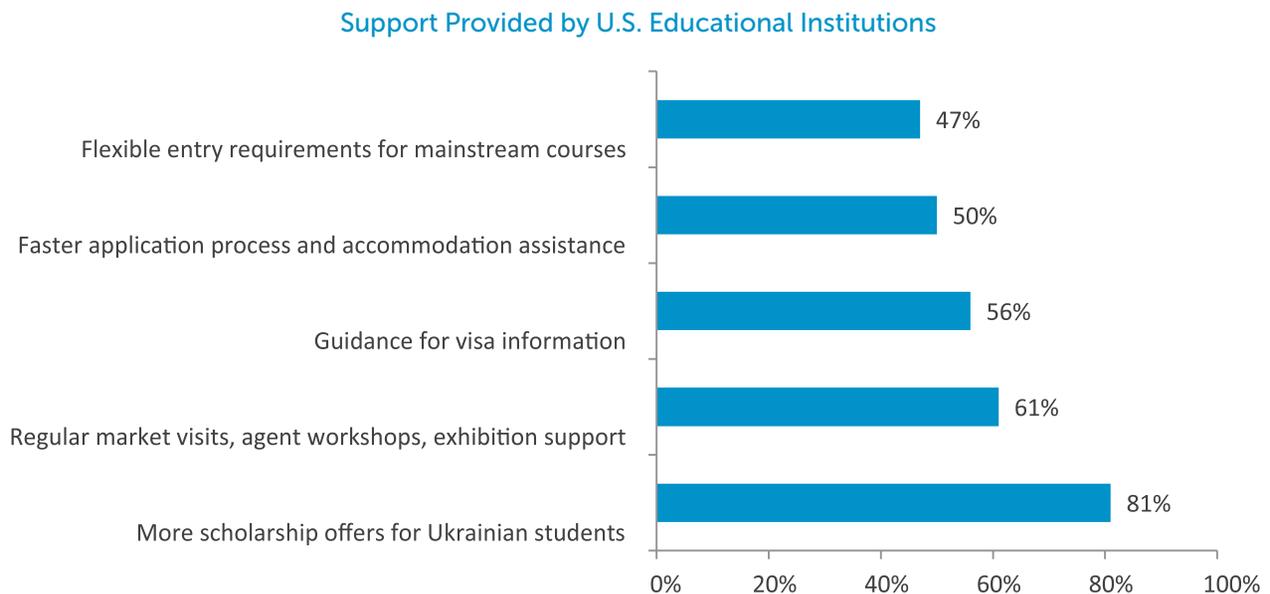


| Support Provided by U.S. Educational Institutions

Most agents are currently satisfied with the support they receive from U.S. institutions. Half said they were “very satisfied” and half said they were “satisfied.” When asked what additional forms of support would help them to promote student recruitment for the U.S., companies named the following:

- More scholarship offers for Ukrainian students (81 percent)
- Regular market visits, agent workshops, exhibition support (61 percent)
- Guidance for visa information (56 percent)
- Faster application process and accommodation assistance (50 percent)
- Flexible entry requirements for mainstream courses (47 percent)

Figure 24: Agents Survey - What types of additional support (if any) would you like from U.S. education providers to promote the U.S. student recruitment business in Ukraine?





This survey shows that there is growing interest in U.S. education among Ukrainians. On one hand, this interest is tempered by Ukraine's economic situation, but on the other hand it is boosted by increasingly closer diplomatic relations. As recruitment agents noted, Canada recognized this window of opportunity several years ago and actively promoted its schools with multiple, coordinated outreach efforts to students. To compete with countries like Canada in this market CS Kyiv believes that all American stakeholders (e.g. government, non-profit, and profit-making organizations) are responsible for promoting the U.S. as a premier study destination.

Given the competitive pressures in this market, now is the time to seize the opportunity created by the repeal of the National Association for College Admission Counseling's (NACAC) ban on the use of commissioned international education agents by U.S. educational institutions. As a result of the removal of this restriction, a June 2016 study entitled "The Pace of Adoption of International Student Recruitment Agencies by U.S. Institutions" shows that the use of agents for international recruitment has become more common among universities over the past three years. According to this study, today nearly half of U.S. colleges directly or indirectly collaborate with agents to help drive student recruitment and roughly four in ten universities now indicate that they work directly with recruitment agencies. Therefore, the partnerships between U.S. schools and agents will continue to grow in coming years.

As the survey results show, local recruiting agents offer valuable insight into this market and moreover they are successful. The results also show that one size does not fit all for Ukrainian

students. In short, there is room in this growing market for multiple stakeholders because students use a wide variety of channels to reach their goals depending on their circumstances. CS Kyiv therefore encourages U.S. institutions to participate in its upcoming events and promotion efforts – some of which are agent-focused and others, such as these reports, which are carried out in cooperation with EducationUSA to promote the U.S. as the premier education destination for Ukrainian students.

As a member of the U.S. diplomatic community, CS Kyiv is committed to both increasing U.S. education exports and to strengthening the cross-cultural ties and knowledge transfer that result from international student experiences. It is no coincidence that many members of our staff (Americans and Ukrainians alike) are themselves the products of international education, facilitated by governmental, non-profit, and recruiting agent channels. Given this fact, CS Kyiv seeks to actively promote international education in the U.S. via multiple channels (public and private) depending on the needs of our clients and Ukrainian students.



1. <http://biz.liga.net/upskill/all/stati/3437874-dorogo-plokho-zato-dlya-vsekh-vysshee-obrazovanie-v-ukraine.htm>

2. Universal Basic Skills: What countries stand to gain' by economists Eric Hanushek and Ludger Woessmann.<http://www.independent.co.uk/news/education/education-news/global-school-rankings-interactive-map-shows-standards-of-education-across-the-world-10247405.html>

3. Dobbins M. and Khachatryan S, (2014) "Europeanization in the "Wild East"? Analyzing Higher Education Governance Reform in Georgia and Armenia".

4. http://www.yourcompass.org/docs/Employees%20on%20University_Graduates.pdf

5. <http://www.cedos.org.ua/uk/osvita/kilkist-studentiv-ukraintsiv-za-kordonom>

6. <http://www.iie.org/Research-and-Publications/Open-Doors/Data/International-Students/All-Places-of-Origin/2013-15>

7. Shorelight Education analysis of data from U.S. Immigration and Customs Enforcement obtained through a Freedom of Information Act (FOIA) request. Data is aggregate over specified time period 2013 - 2014 calendar years.

APPENDIX I: Student Survey Respondent Characteristics

Age

	Overall Respondents		Prospective Students		Former Students	
	Response Percent	Response Count	Response Percent	Response Count	Response Percent	Response Count
Younger 15 years old	2.6%	25	3.8%	21		
15-18 years old	19.0%	185	24.1%	134	18.3%	30
19-24 years old	29.5%	287	28.5%	158	41.5%	68
25-34 years old	21.4%	208	22.0%	122	24.4%	40
35-44 years old	23.5%	229	18.7%	104	12.8%	21
45-54 years old	3.7%	36	2.5%	14	3.1%	5
55+ years old	0.4%	4	0.4%	2		
Total	100.0%	974	100.0%	555	100.0%	164

Place of Residency

	Overall Respondents		Potential Students		Former Students	
	Response Percent	Response Count	Response Percent	Response Count	Response Percent	Response Count
Vinnitsa Oblast	3.4%	33	3.4%	19	2.4%	4
Volyn Oblast	1.0%	10	1.1%	6	1.2%	2
Dnipropetrovsk Oblast	5.1%	49	5.9%	33	1.8%	3
Dontesk Oblast	1.3%	13	0.7%	4	1.8%	3
Zhytomir Oblast	1.2%	12	1.3%	7	2.4%	4
Zakarpattia Oblast	1.8%	17	2.2%	12	2.4%	4
Zaporizhzhya Oblast	3.9%	38	3.8%	21	3.7%	6
Ivano-Frankivsk Oblast	3.6%	35	4.1%	23	3.1%	5
Kyiv Oblast	31.8%	307	30.1%	167	40.9%	67
Kirovograd Oblast	0.9%	9	0.9%	5	0.6%	1
Luhansk Oblast	0.4%	4	0.4%	2	0.6%	1
Lviv Oblast	15.1%	146	16.4%	91	11.0%	18
Mykolaiv Oblast	1.1%	11	1.6%	9	1.2%	2
Odesa Oblast	4.3%	42	3.8%	21	5.5%	9
Poltava Oblast	2.2%	21	1.4%	8	3.1%	5
Rivne Oblast	2.2%	21	2.3%	13	1.8%	3
Sumy Oblast	0.9%	9	1.3%	7	0.0%	0
Ternopil Oblast	3.4%	33	3.4%	19	2.4%	4
Kharkiv Oblast	9.3%	90	9.4%	52	7.9%	13
Kherson Oblast	0.9%	9	0.9%	5	1.2%	2
Khmelnitskiy Oblast	1.8%	17	1.1%	6	1.8%	3
Cherkassy Oblast	1.3%	13	1.4%	8	1.2%	2
Chernivtsi Oblast	1.8%	17	2.0%	11	1.8%	3
Chernihiv Oblast	1.1%	11	1.1%	6	0.0%	0
Total	100.0%	967	100.0%	555	100.0%	164

Student Enrollment Status

	Overall Respondents		Prospective Students		Former Students	
	Response Percent	Response Count	Response Percent	Response Count	Response Percent	Response Count
Currently Enrolled	32.6%	315	33.0%	183	45.7%	75
Not Currently Enrolled	67.4%	651	67.0%	372	54.3%	89
Total	100.0%	966	100.0%	555	100.0%	164

Current Students by Type of Program

	Overall Respondents		Prospective Students		Former Students	
	Response Percent	Response Count	Response Percent	Response Count	Response Percent	Response Count
High School	3.1%	10	3.2%	6	2.6%	2
Vocational college	3.1%	10	3.8%	7	0.0%	0
University preparation course	0.9%	3	0.5%	1	2.6%	2
Undergraduate program	66.4%	211	69.2%	128	61.8%	47
Master's degree program	25.2%	80	22.7%	42	30.3%	23
Doctoral degree program	2.2%	7	1.6%	3	4.0%	3
Total	101%	321	101%	187	101%	77

Highest Level of Education Obtained

	Overall Respondents		Prospective Students		Former Students	
	Response Percent	Response Count	Response Percent	Response Count	Response Percent	Response Count
High school diploma	10.9%	70	13.5%	50	12.1%	11
Vocational college	3.3%	21	2.4%	9	3.3%	3
Undergraduate program	7.8%	50	6.2%	23	12.1%	11
Graduate program	29.5%	190	27.0%	100	41.8%	38
Doctoral degree	7.1%	46	6.2%	23	11.0%	10
Specialist degree	27.8%	179	25.7%	95	12.1%	11
Other	13.8%	89	18.9%	70	7.7%	7
Total	100%	645	100%	370	100%	91



| APPENDIX 2: Recruitment Agent Respondent Characteristics

Location of Main Office

City	Response Percent	Response Count
Kyiv	74.4%	29
Kharkiv	7.7%	3
Odesa	5.1%	2
Dnipropetrovsk	5.1%	2
Lviv	0.0%	0
Other	7.7%	3

Location of Representative Offices

City	Response Percent	Response Count
Kyiv	48.7%	19
Kharkiv	17.9%	7
Odesa	25.6%	10
Dnipropetrovsk	17.9%	7
Lviv	20.5%	8
None	20.5%	8

Number of Employees

Number of employees	Response Percent	Response Count
0-10	66.7%	26
11-20	17.9%	7
21-30	0.0%	0
31 and more	15.4%	6

Types of Programs Promoted

Business Direction	Response Percent	Response Count
Private high schools	79.5%	31
Community college	71.8%	28
Bachelor programs	92.3%	36
Master's programs	89.7%	35
University preparation programs	92.3%	36
Language schools/courses	100.0%	39
Other	7.7%	3





| Education USA Ukraine

EducationUSA is a U.S. Department of State network of over 400 international student advising centers in more than 170 countries. It promotes U.S. higher education to students around the world by offering accurate, comprehensive, and current information about opportunities to study at accredited postsecondary institutions in the United States. EducationUSA also provides services to the U.S. higher education community to help institutional leaders meet their recruitment and campus internationalization goals. EducationUSA is your official source for U.S. higher education.

For more information, please contact:

Tetyana Kotko, Educational Adviser at:

E-mail: edusa@americancouncils.org.ua

 Website: <http://edusa.org.ua>

<http://educationusa.state.gov>

| Shorelight Education

Shorelight Education works with international students from 100+ countries and is reinventing the international education experience for students worldwide. Based in Boston, the company partners with top-ranked, nonprofit American universities to build comprehensive programs and services that are high-touch and technology-driven to help talented students succeed on campus and become globally minded alumni.

For more information, please contact:

Michael Lawson, Regional Director at:

E-mail: Michael@shorelight.com

 Website: www.shorelight.com



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EDUCATION**

| Recruitment Agents

The U.S. Commercial Service in Ukraine would like to thank 39 education companies that participated in the recruiting agent survey and also promoted the student survey via their networks.

| Survey Respondents

The U.S. Commercial Service in Ukraine would like to thank the 974 respondents for giving their time to take part in this important part of research into the sector. We particularly appreciate the extra time you spent to provide comments.

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