



US MARKET INSIGHT WEBINAR SERIES

NACAC: State of College Admission

Tuesday, 25 August 2015

11:00 – 12:00 EDT (16:00 – 17:00 GMT)

SERVICES FOR INTERNATIONAL EDUCATION MARKETING

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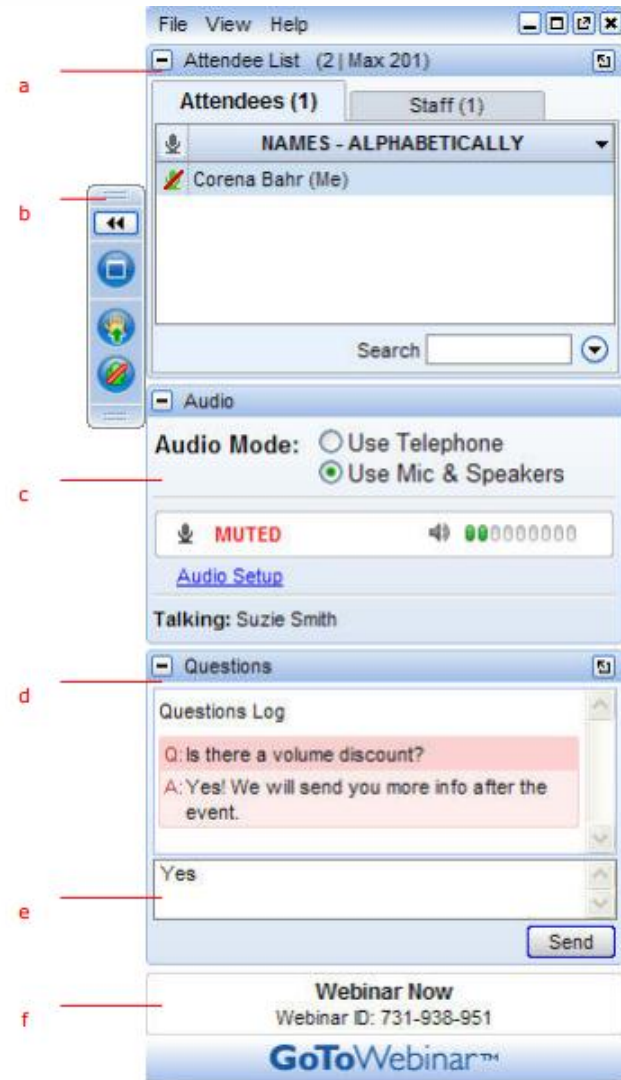
Jenna.hartsell@britishcouncil.org

Agenda

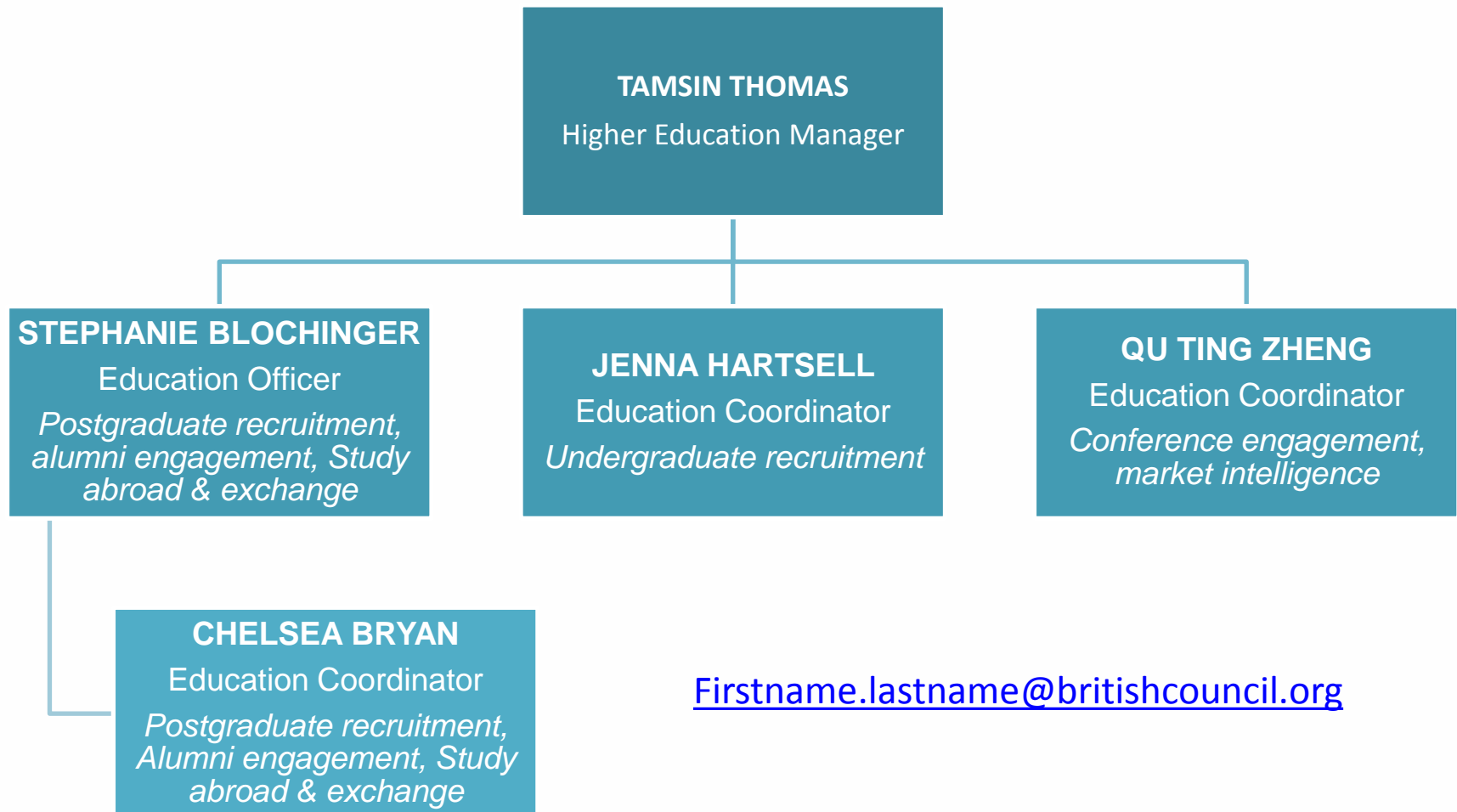
- Introductions
- Key findings – State of College Admission
 - Methodology
 - High school graduation and college enrollment
 - Admission strategies
 - Factors in the Admission decision
 - School counselors and college counseling
 - Transfer students
 - International education
- US university case study – George Mason University
- Discussion/Q&A

In-session features

- a) Attendee List
- b) Grab Tab
- c) Audio Setup
- d) Questions Pane
- e) Type questions here
- f) Webinar details



British Council SIEM USA contacts





Undergraduate Autumn 2015 and beyond

- Autumn 2015 tour
 - Chicago: 24-26 September
 - NACAC conference: 1-3 October
 - Mid-Atlantic: 25-30 October
 - New York & New England: 1 – 5 November
- Education UK Counselor Missions (dates TBA)
- Webinars for US counseling professionals
 - Guiding your students through undergraduate admissions to Medicine in the UK – 17 September

Our presenters

National Association for College Admission Counseling

Lindsay Addington

Assistant Director of International Initiatives

Melissa Clinedinst

Associate Director of Research



COLLEGE ADMISSION

University speaker: George Mason University (VA)

David Burge

Vice President for Enrollment Management



State of College Admission

2014 Report

NAACAC

Data Sources

- NACAC Annual Surveys
 - Counseling Trends Survey
 - Admission Trends Survey
- External Data
 - US Department of Education IPEDS Data
 - US Census Bureau
 - Other Education Organizations

Methodology

2013 Admission Trends Survey

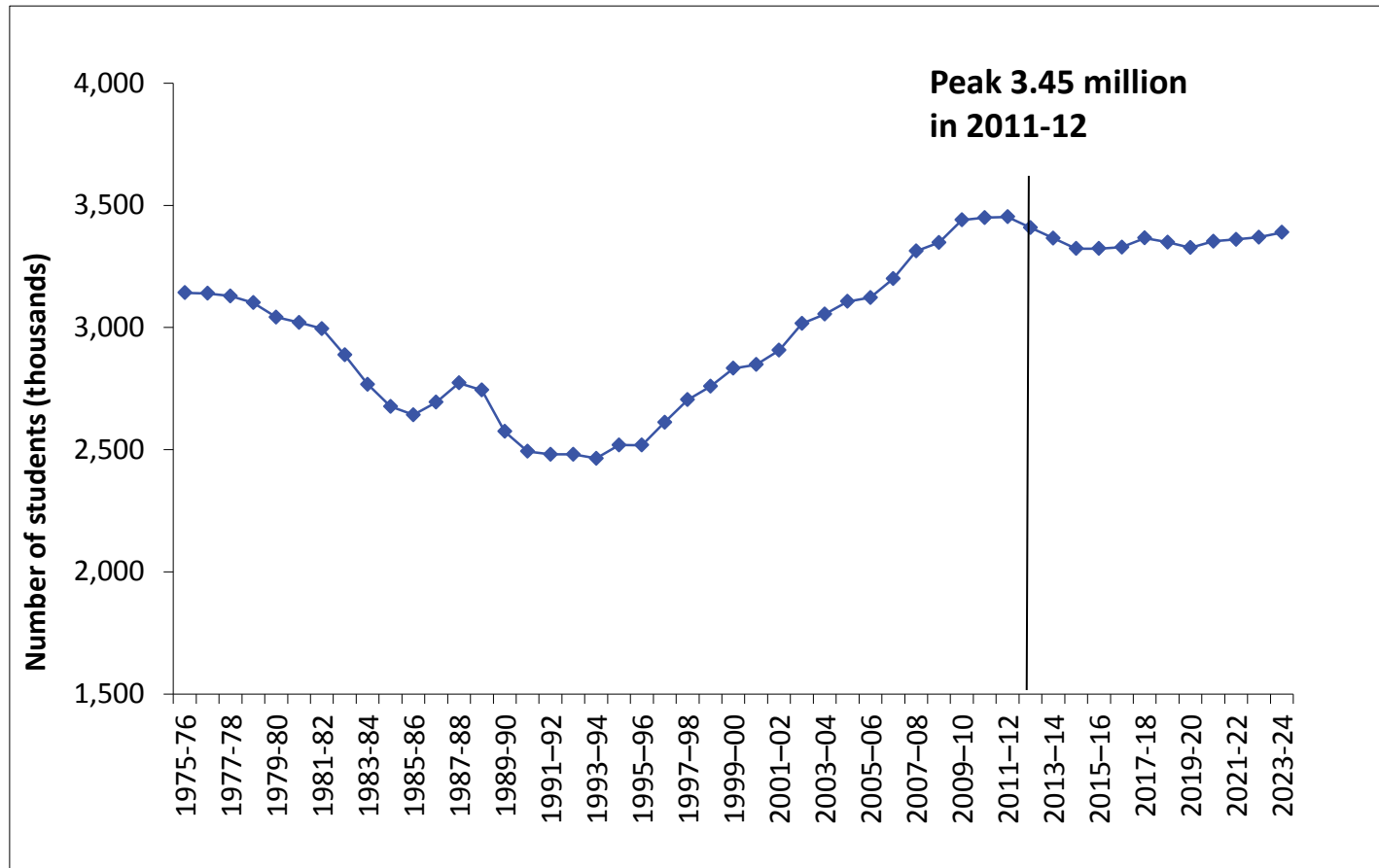
- Surveyed 1,241 NACAC member colleges
 - NACAC member colleges represent 66% of all accredited, 4-yr, nonprofit, Title-IV participating colleges in the US that grant bachelors degrees
- Received 352 responses (28% response rate)
- Survey respondents larger, on average, compared to all colleges; public survey respondents had slightly lower acceptance rates

2013 Counseling Trends Survey

- Surveyed NACAC member secondary schools plus random sample of all public high schools (10,000 total)
- 729 usable responses
- Survey respondents over-representative of private schools; under-representative of schools with higher proportions of low-income students

High School Graduation and College Enrollment

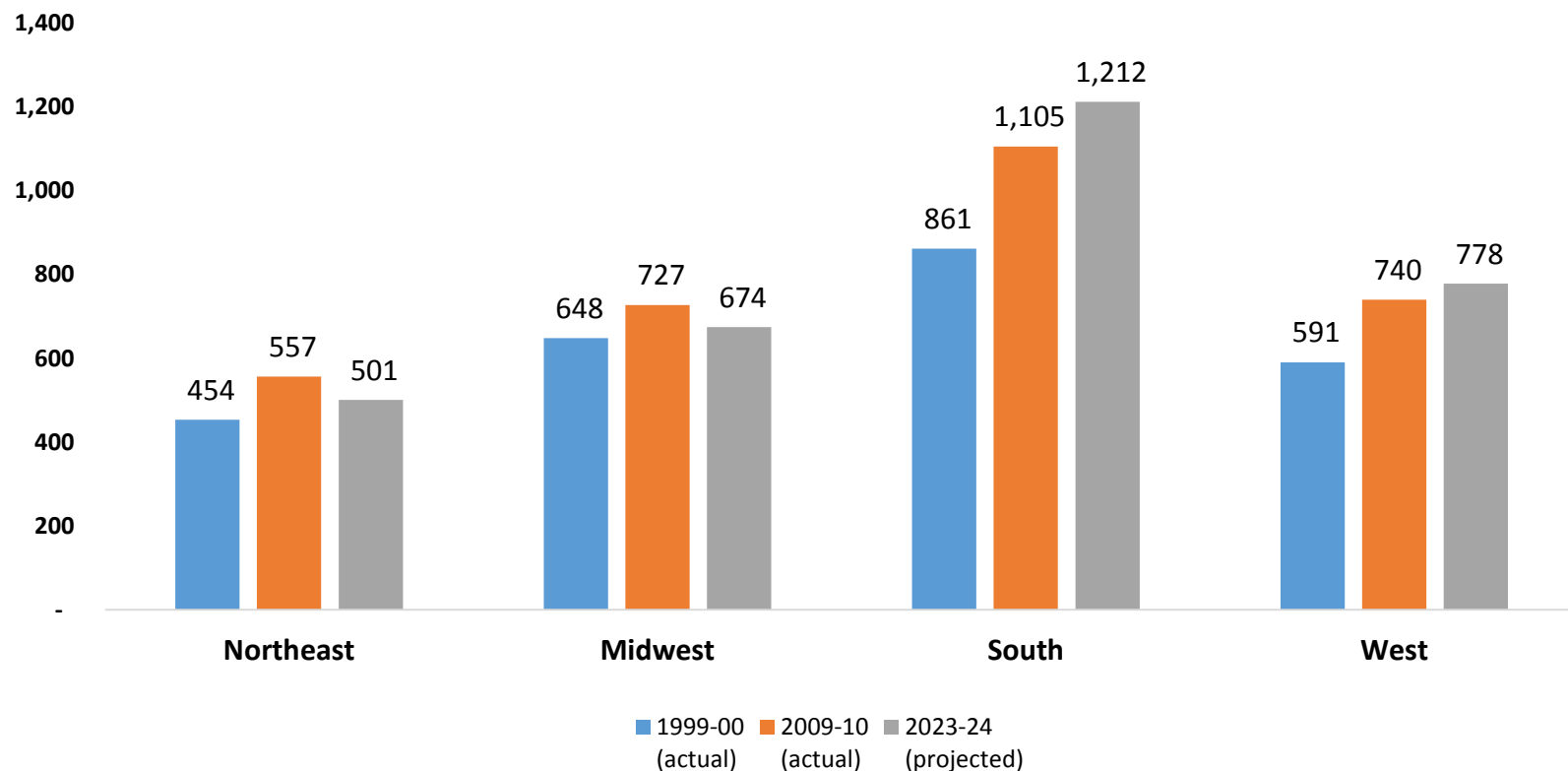
Number of High School Graduates: Actual and Projected



Note: Includes both public and private high school graduates.

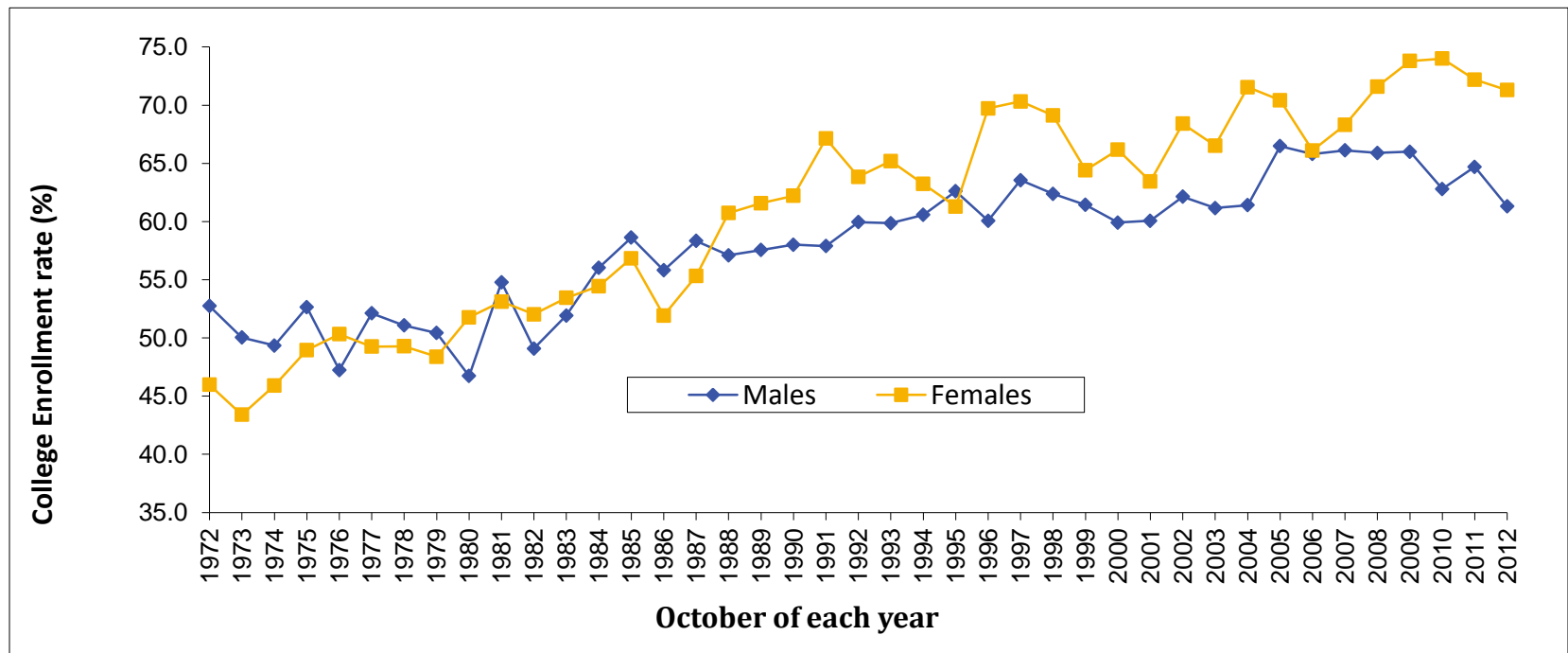
Source: US Department of Education, National Center for Education Statistics. (2013). Digest of Education Statistics. (Table 210.10).

Actual and Projected Numbers of Public High School Graduates, by Region: 1999–00, 2009–10 and 2023–24 (in thousands)



SOURCE: US Department of Education, National Center for Education Statistics. (2013). Digest of Education Statistics. (Table 219.20).

College Enrollment Rates of Recent High School Completers, by Gender: 1972 to 2012



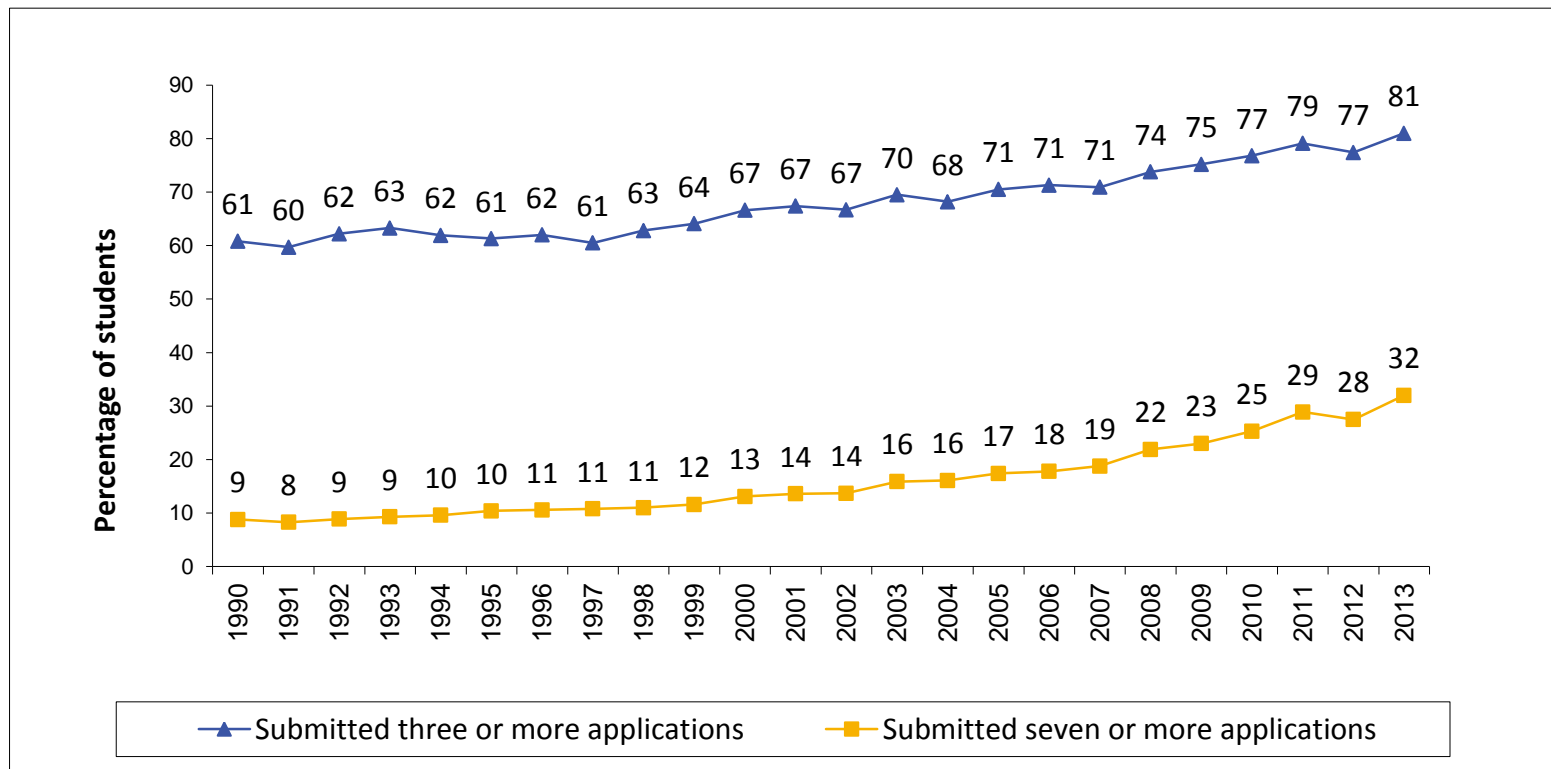
NOTE: Enrollment in college as of October each year for individuals ages 16 to 24 who completed high school during the preceding 12 months. High school completers include both diploma and GED recipients.

SOURCE: *Digest of Education Statistics*. (2013). U.S. Department of Education, Washington, DC: National Center for Education Statistics. (Table 302.10).

Applications to College

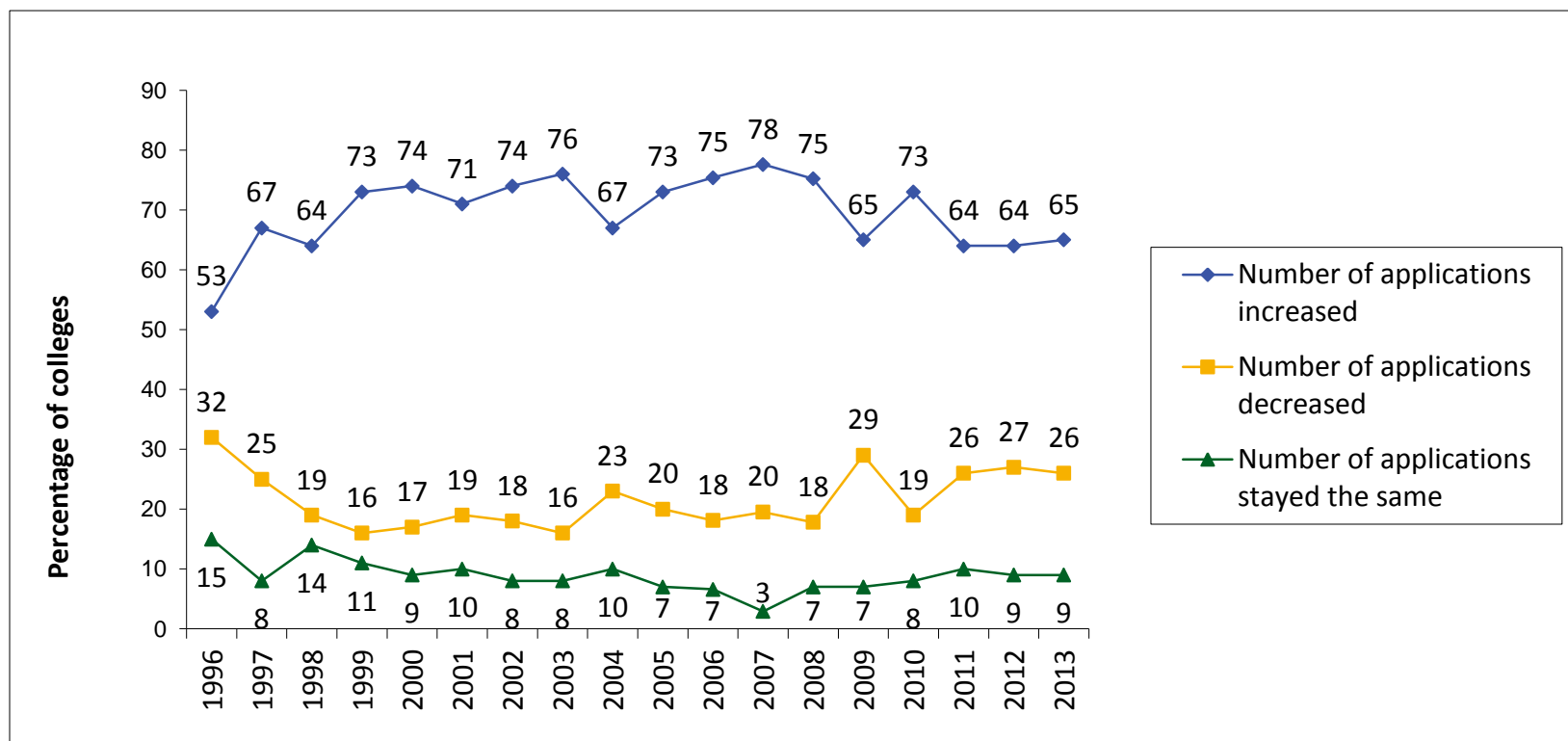
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Percentage of Students Submitting Three or More and Seven or More Applications: 1990 to 2013



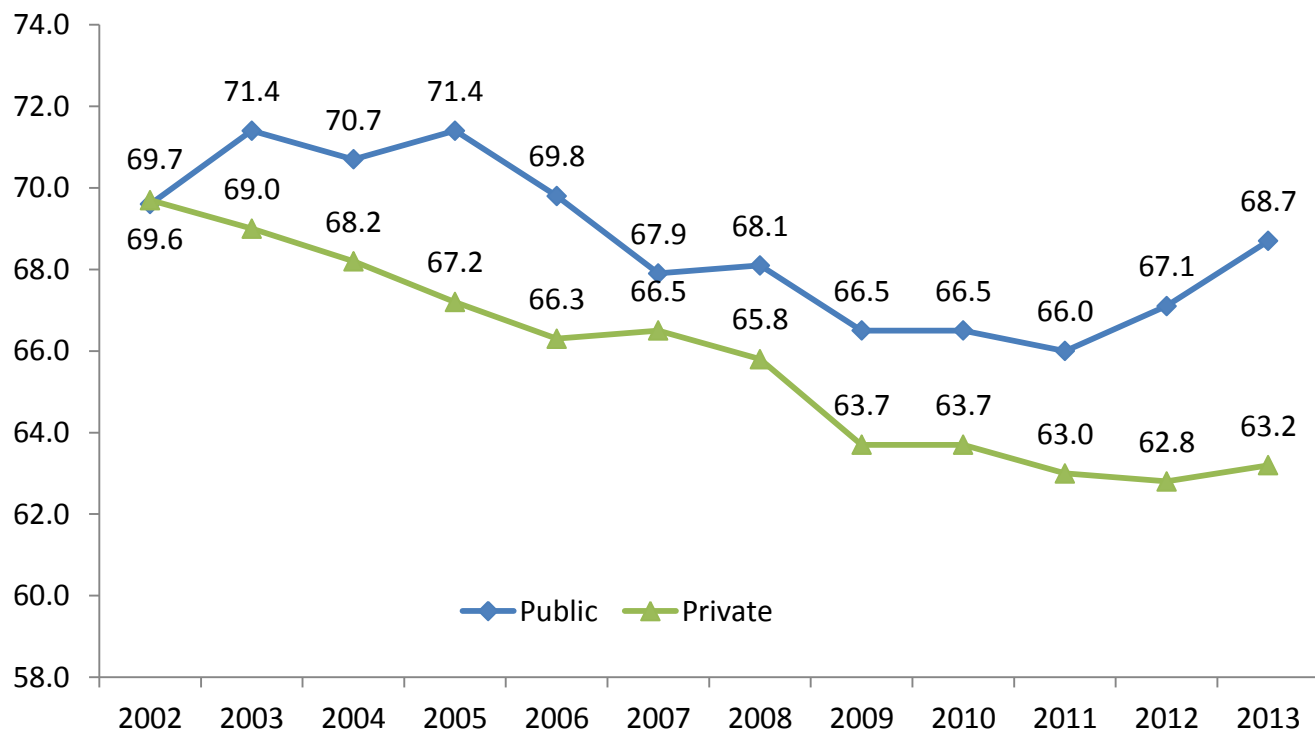
SOURCE: Higher Education Research Institute, UCLA. Annual *The American Freshman* reports.

Percentage of Colleges Reporting Change from the Previous Year in Number of Applications for Fall Admission: 1996 to 2013



SOURCE: NACAC Admission Trends Survey, 1996 - 2013.

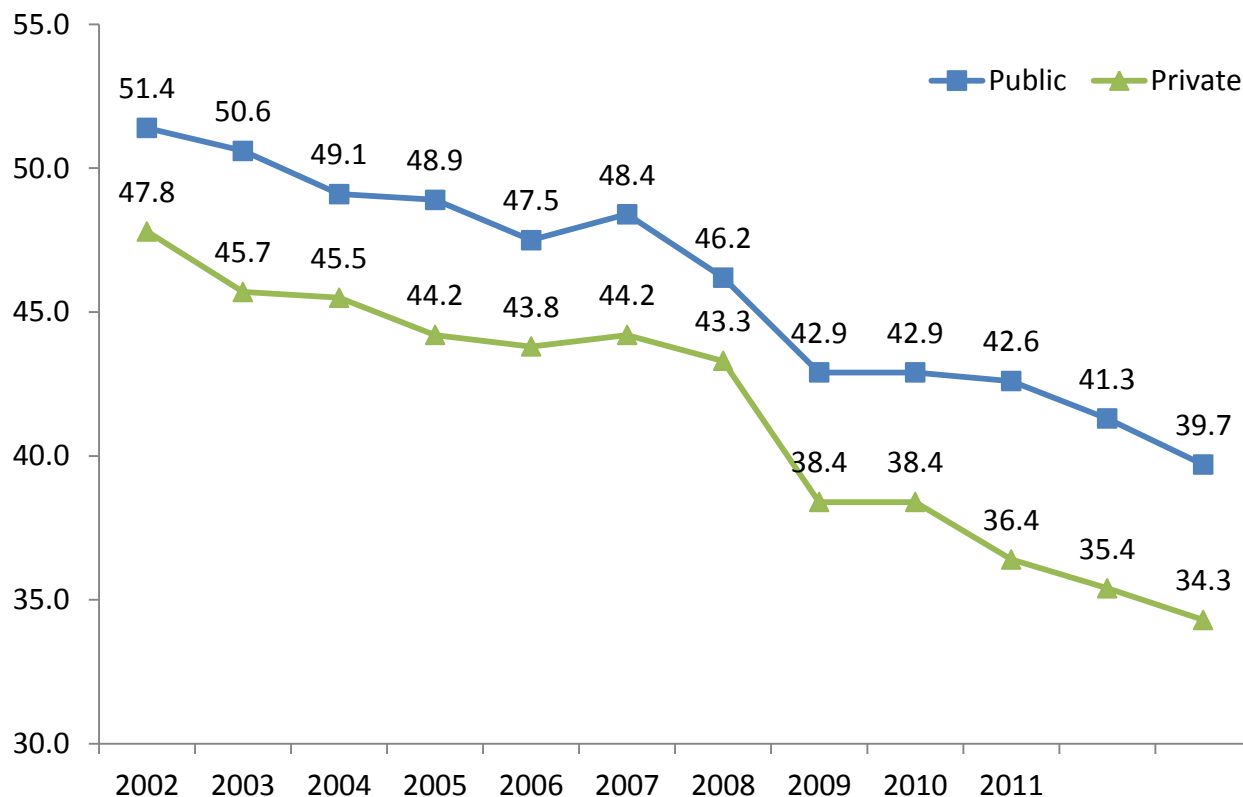
Trends in Average Acceptance Rate at Four-Year Colleges



Note: The list of colleges was drawn from the 2002-2013 Integrated Postsecondary Education Data System (IPEDS) using the online IPEDS Data Center. For each year of data, institutions were selected using the following criteria: US location, four-year, not-for-profit, baccalaureate degree-granting, and Title-IV participating. Institutions that indicated having open admission policies were then excluded.

Source: Integrated Postsecondary Education System (IPEDS) online Data Center. (2011-12). US Department of Education, Washington DC: National Center for Education Statistics.

Trends in Average Yield Rate at Four-Year Colleges



Note: The list of colleges was drawn from the 2002-2013 Integrated Postsecondary Education Data System (IPEDS) using the online IPEDS Data Center. For each year of data, institutions were selected using the following criteria: US location, four-year, not-for-profit, baccalaureate degree-granting, and Title-IV participating. Institutions that indicated having open admission policies were then excluded. Source: Integrated Postsecondary Education System (IPEDS) online Data Center. (2011-12). US Department of Education, Washington DC: National Center for Education Statistics.

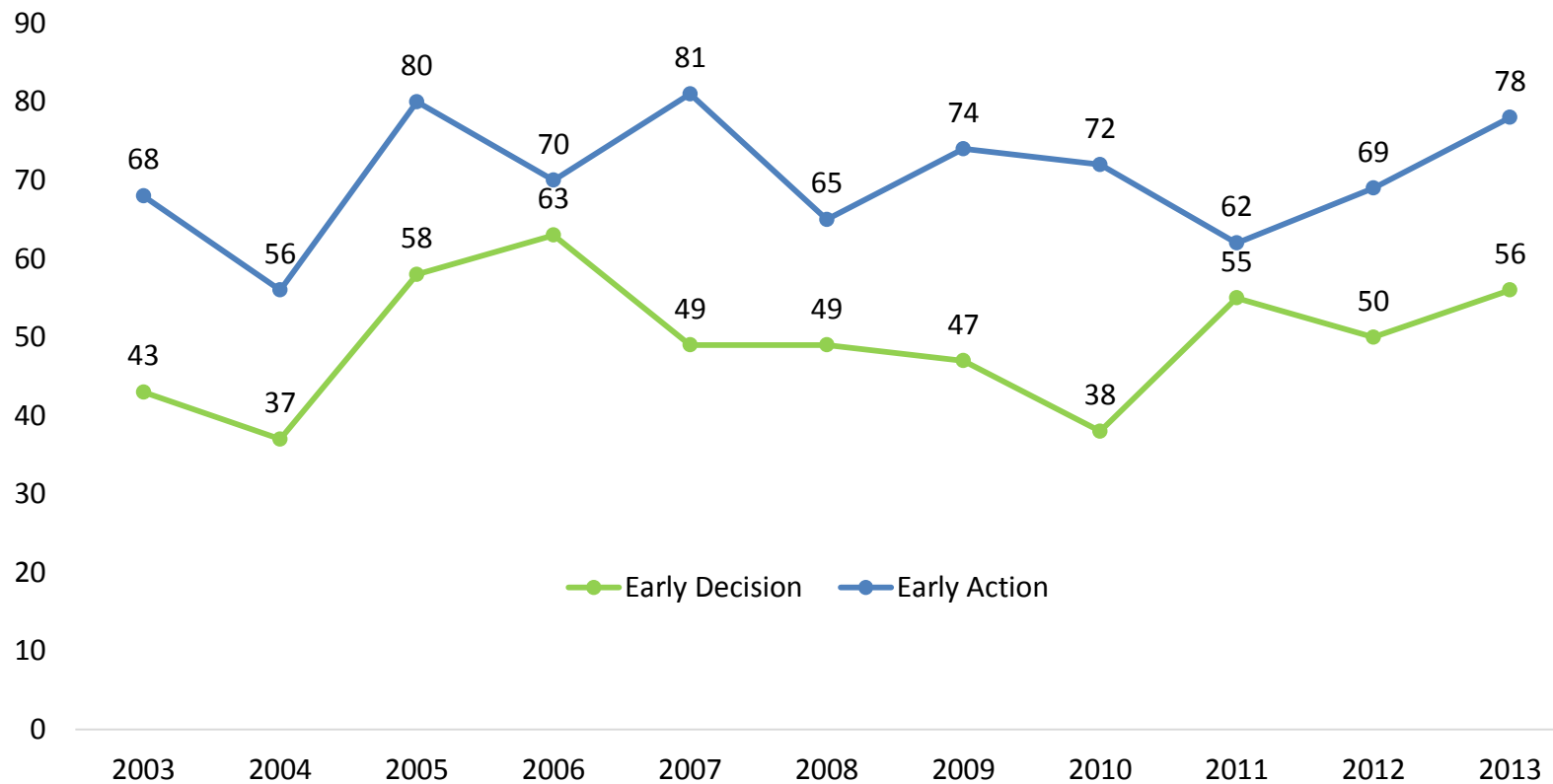
Admission Strategies

Percentage of Colleges Using Early Admission Strategies and Wait Lists: Fall 2013

	Early Decision	Early Action	Wait List
Total	18.3%	32.4%	42.6%
<i>Control</i>			
Public	8.9	26.7	35.6
Private	22.9	35.1	45.8

SOURCE: NACAC Admission Trends Survey, 2013.

Percentage of Colleges Reporting Increases in Early Applications



SOURCE: NACAC Admission Trends Survey, 2013.

Key Statistics for Early Decision Colleges: Fall 2013

	Mean
Mean percentage of all applications received at ED colleges through Early Decision	8.1%
Mean percentage of Early Decision applications accepted (ED selectivity rate)	64.0
Mean overall selectivity rate for institutions with Early Decision	53.2
Mean percentage of admitted ED students who enrolled (ED yield rate)	86.6
Mean overall yield rate at ED colleges	31.6

SOURCE: NACAC Admission Trends Survey, 2013.

Key Statistics for Early Action Colleges: Fall 2013

	Mean
Mean percentage of all applications received at EA colleges through Early Action	42.4%
Mean percentage of Early Action applications accepted (EA selectivity rate)	66.7
Mean overall selectivity rate for institutions with Early Action	65.0
Mean percentage of admitted EA students who enrolled (EA yield rate)	29.1
Mean overall yield rate at EA colleges	27.9

SOURCE: NACAC Admission Trends Survey, 2013.

Mean Percentage of Students Admitted off the Wait List: Fall 2013

	Mean Percent Admitted
Total	30.5%
<i>Control</i>	
Public	35.2
Private	28.9
<i>Selectivity</i>	
Accept fewer than 50% of applicants	16.3
50 to 70%	34.5
71 to 85%	46.2
More than 85%	--

-- Category included only one institution.

NOTE: Figures in italics should be interpreted with caution due to low sample size (fewer than 15 institutions per cell).
SOURCE: NACAC Admission Trends Survey, 2013.

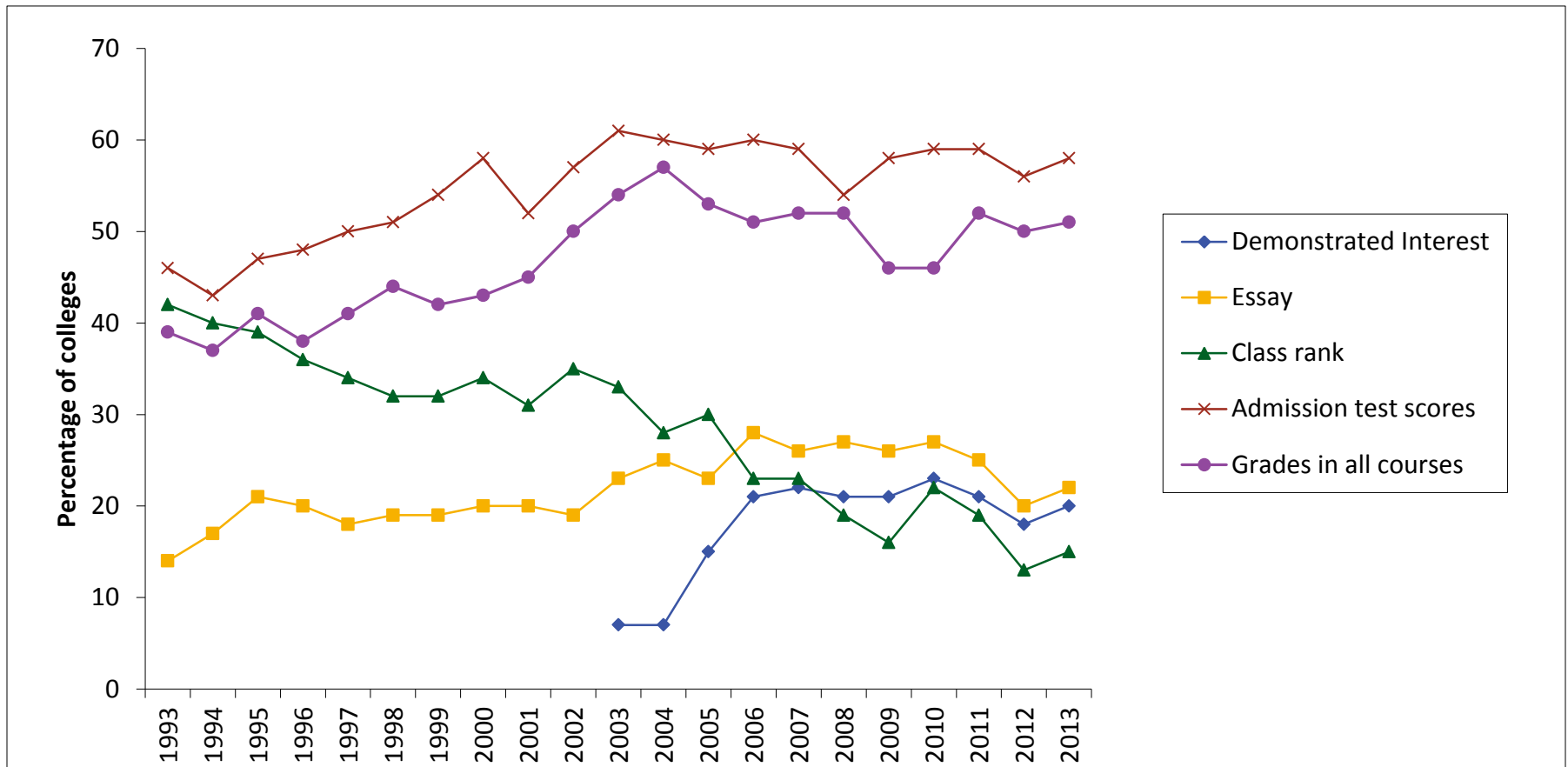
Factors in the Admission Decision

Percentage of Colleges Attributing Different Levels of Importance to Factors in the Admission Decision: 2013

Factor	Considerable importance	Moderate importance	Limited importance	No importance
Grades in college prep courses	81.5%	10.4%	7.4%	0.7%
Strength of curriculum	63.7	24.8	8.1	3.3
Admission test scores (SAT, ACT)	58.3	29.5	10.0	2.2
Grades in all courses	51.5	37.4	8.9	2.2
Essay or writing sample	22.2	37.8	22.6	17.4
Student's demonstrated interest	20.1	34.0	23.9	22.0
Counselor recommendation	15.9	43.9	24.7	15.5
Teacher recommendation	15.2	35.3	33.5	16.0
Class rank	14.1	43.9	28.3	13.8
Extracurricular activities	9.6	40.6	33.9	15.9
Interview	7.8	21.2	27.9	43.1
Portfolio	7.5	30.6	32.5	29.5
Subject test scores (AP, IB)	6.4	9.4	34.3	49.8
SAT II scores	6.0	10.9	23.7	59.4
State graduation exam scores	3.4	10.1	28.4	58.2
Work	2.6	17.1	51.3	29.0

SOURCE: NACAC Admission Trends Survey, 2013.

Factors Showing Most Change in “Considerable Importance” Rating: 1993 to 2013



SOURCE: NACAC Admission Trends Survey, 2013.

Differences Among Institutions in Admission Factor Rating

Public vs. Private

Private: Essay/writing sample, interview, counselor and teacher recommendations, extracurricular activities, portfolios, and demonstrated interest

Enrollment Size

Smaller: Interview, counselor and teacher recommendations, demonstrated interest, portfolios, and state graduation exam scores

Selectivity

More Selective: Similar criteria to private and smaller institutions, in addition to strength of curriculum, work, subject test scores (AP and IB) and SAT II scores

School Counselors and College Counseling

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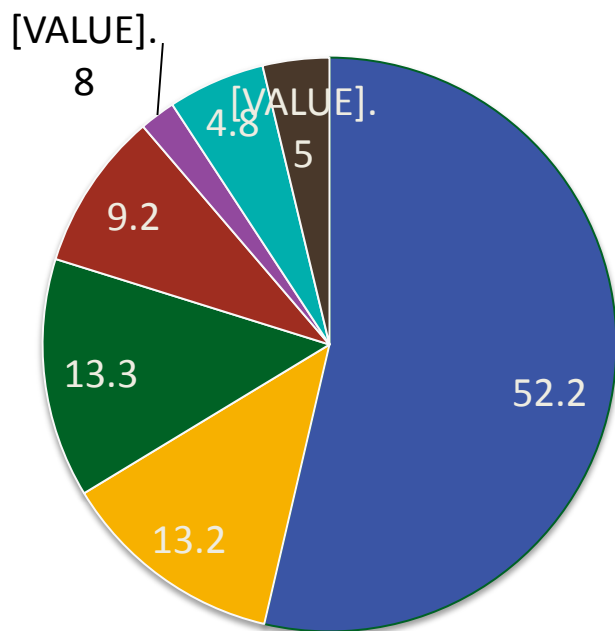
Students Per Counselor at Public Schools

- In 2011-12, each public school counselor responsible for 475 students, on average
- Five states with ratios higher than 700 students per counselor: AZ, CA, MN, MI, UT
- Counseling Trends Survey data indicate that ratios are higher at public schools

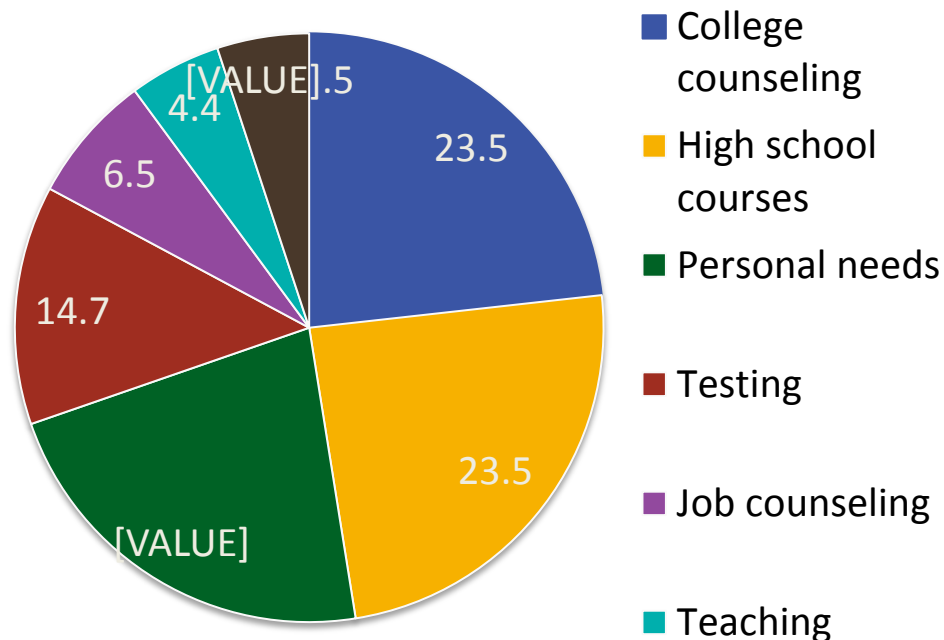
SOURCES: Common Core of Data. Elementary/Secondary Information System (ELSi) tableGenerator. (2011-12) US Department of Education, Washington, DC: National Center for Education Statistics.
NACAC Counseling Trends Survey, 2013.

Percentage of Time on College Counseling

Private Schools



Public Schools



Transfer Students

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Mean Freshman to Transfer Ratios at Four-Year Colleges: 2012-13

	Freshman Apps per Transfer App	Freshman Admits per Transfer Admit
Total	11.6	14.1
Public	5.3	5.4
Private	14.8	18.3

Source: NACAC Admission Trends Survey, 2013

Comparison of Freshman and Transfer Admission Statistics at Four-Year Colleges: 2012-13

	Transfer Acceptance Rate	Freshman Acceptance Rate	Transfer Yield	Freshman Yield
Total	62.6	64.7	54.4	32.7
Public	67.7	66.2	61.1	37.2
Private	60.0	64.1	51.3	30.7

Source: NACAC Admission Trends Survey, 2013

Four-Year Colleges' Expectations About Importance of Transfer Recruitment Over Next 3 Years

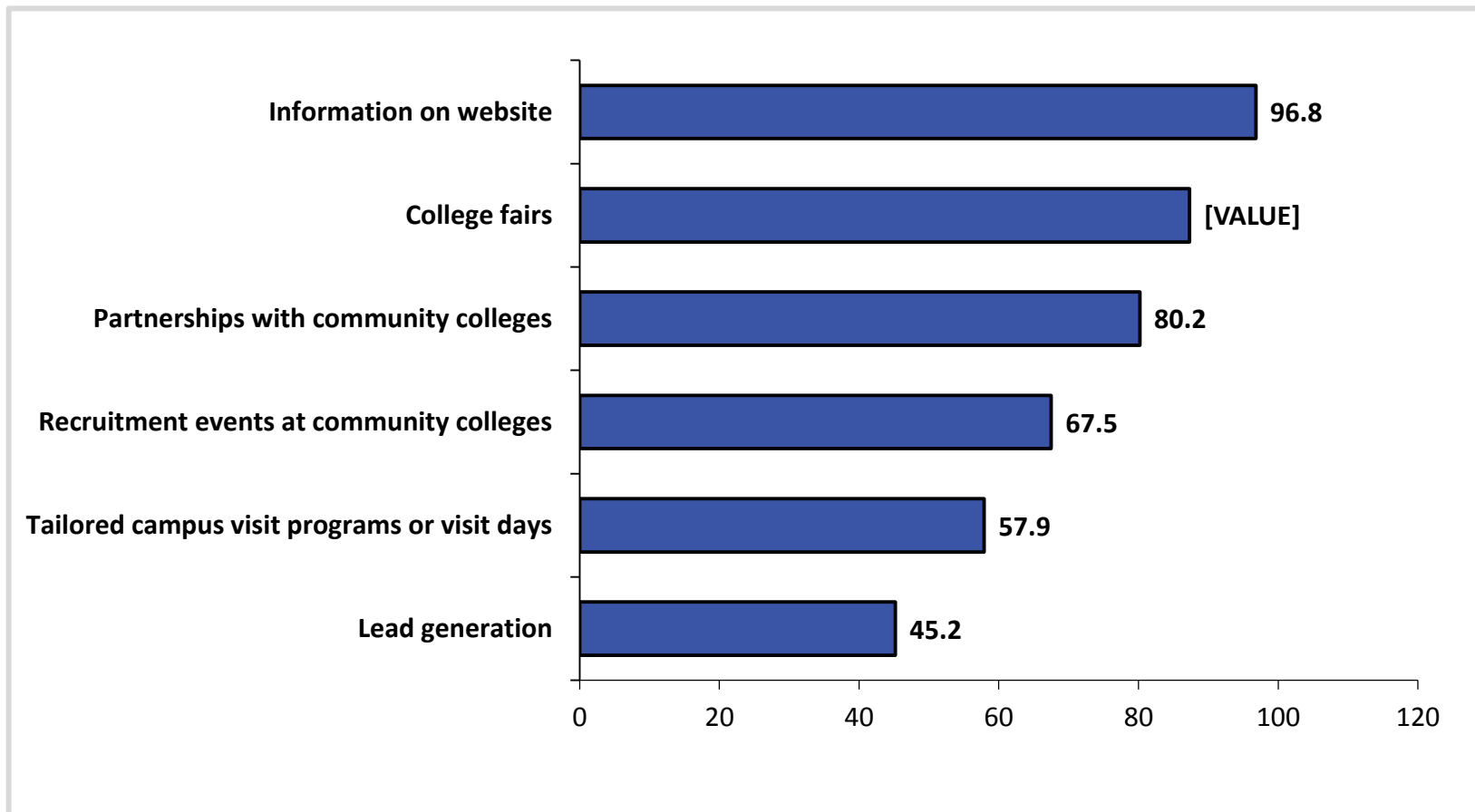
	More Important	Stay the Same	Less Important
Total	57.9%	40.5%	1.6%
Public	67.1	31.7	1.2
Private	53.5	44.7	1.8

Source: NACAC Admission Trends Survey, 2013

Mean Percentage of Newly Enrolled Transfer Students at Four-Year Colleges who Transferred from a Two-Year Institution: 2012-13

	Mean
Total	53.2%
<i>Control</i>	
Public	66.0
Private	48.3
<i>Total Enrollment</i>	
Fewer than 3,000 students	48.2
3,000 to 9,999	56.4
10,000 or more	64.4
<i>Transfer Selectivity</i>	
Accept fewer than 50 percent of applicants	43.8
50 to 70 percent	53.3
71 to 85 percent	64.9
More than 85 percent	56.7

Transfer Student Recruitment Strategies: 2013



SOURCE: NACAC Admission Trends Survey, 2013.

International Education

NAACAC

US College Counseling and Admission in a Global Context

- US is top host country of internationally mobile students at the secondary and tertiary levels.
- More US citizens pursuing full undergraduate degrees abroad.
- Admission officers need to become more globally-focused and knowledgeable to advance in the profession(NACAC *Career Paths*); same is true for college counselors

International Students at US High Schools

- In 2013, 48,632 international students were enrolled for a full diploma

Top countries of origin:

- China (32.3%)
- South Korea (12%)
- Germany (9.8%)
- Mexico (3.6%)
- Brazil (3.1%)

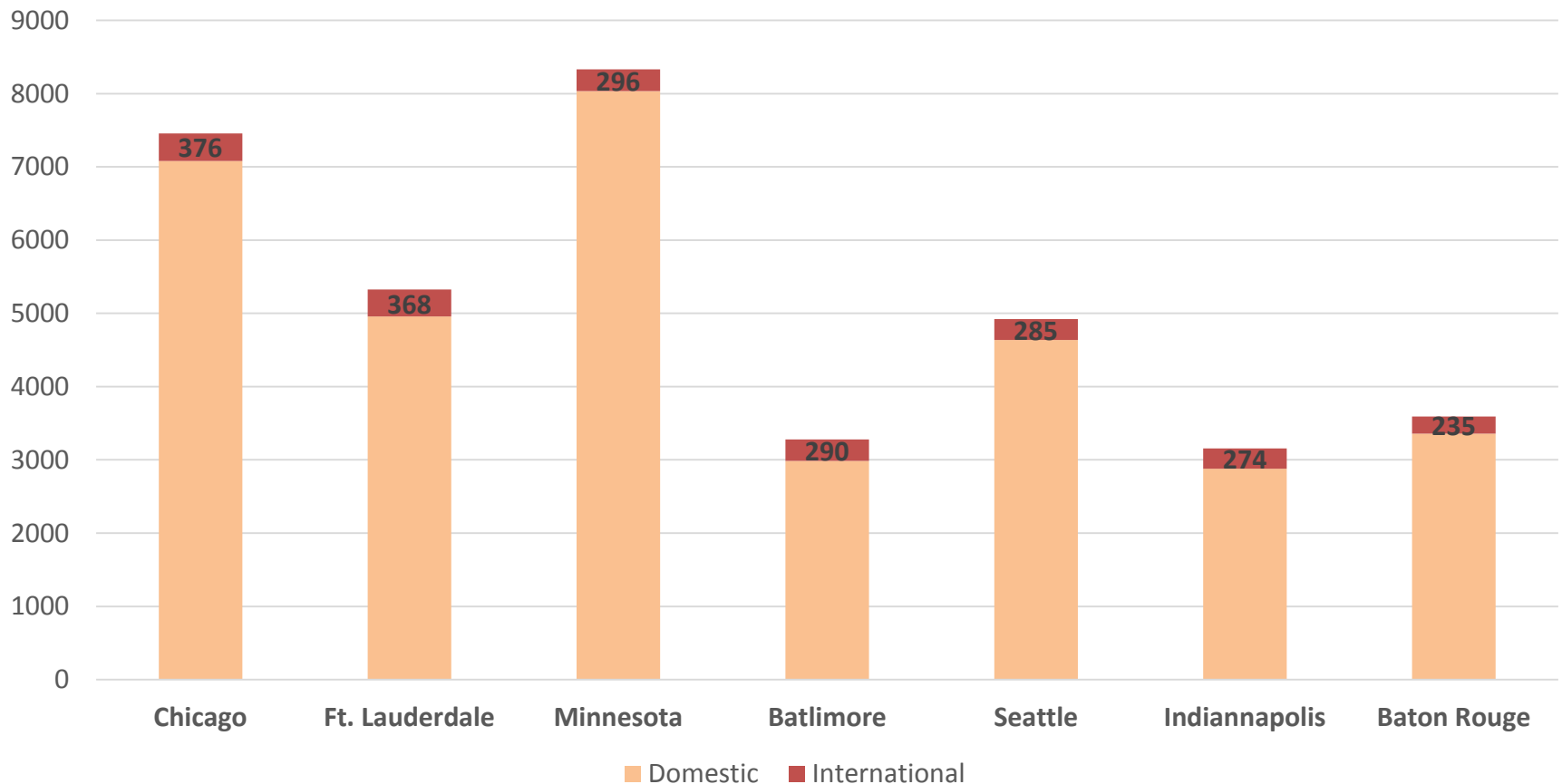
Top host states:

- California (17.6%)
- New York (7.8%)
- Florida (7.6%)
- Massachusetts (7.2%)
- Pennsylvania (6.3%)

- Majority (95%) of international students **attend private institutions**, though efforts increasing at public schools
- **Agency-based recruitment** was the most prevalent method of recruitment among schools that actively recruit.

International Students at NACAC College Fairs

NACAC College Fairs – Fall 2014



Impact on Counseling and Admission

- Counselors underprepared to work with this growing population
 - 79% of US counselors felt either “slightly” or “not at all” prepared to advise international students on **financial aid opportunities**.
 - 69% of US counselors felt either “slightly” or “not at all” prepared to advise international students on taking an **English proficiency exam**.
- US high schools becoming a source of international applicants
 - Are domestic recruiters trained to work with international students?
 - How are students being perceived? Evaluated?

International Students at US Universities

- In 2013-14, 370,724 international students were pursuing UG degrees.

Top countries of origin [UG]:

- China (29.8%)
- South Korea (9.98%)
- Saudi Arabia (7.25%)
- Canada (3.75%)
- India (3.42%)

Top host states [UG & Grad]:

- California (13.73%)
- New York (11.2%)
- Texas (7.3%)
- Massachusetts (5.8%)
- Illinois (4.8% percent)

- Majority (65%) of international students **attend public institutions**, and in 2013-14 70% of students attended just 200 US institutions.
- **Agency-based recruitment** is occurring at approximately 20% of US institutions

Impact on US Universities

- Retention – campus readiness
- Integration/Engagement
- Budget/Revenue
- Capacity/Displacement

US Students Pursuing Degrees Abroad

- In 2011-12, 46,500 US students were pursuing degrees abroad; 42% at UG level.
- Top desination countries [UG]:
 - UK
 - Canada
 - New Zealand
 - France
 - China
 - Australia
- Humanities and social sciences were the most popular disciplines studied

Impact on Counseling and Admission

- Counselors underprepared to work with this growing population
 - 79% of US counselors felt either “slightly” or “not at all” prepared to **provide information on pursuing degrees abroad.**
 - 91% of US counselors felt either “slightly” or “not at all” prepared to assist US students with **using federal financial aid to attend university abroad.**
- Source of competition and collaboration for US institutions.

Trends to Watch

- Pathway programs and conditional admission
- Government-sponsored outbound mobility programs
- English-medium degree programs in non-Anglophone countries
- Increased capacity in-country
- Other countries' student recruitment efforts

University speaker:

David Burge
Vice President for Enrollment
Management





Questions?

Save the date!

DATE & TIME	DESCRIPTION
Tuesday, 29 September 2015	College Board
Tuesday, 20 October 2015	Federal Student Aid (FAFSA) briefing
Tuesday, 24 November 2015	Discussion: the use of agents in the US
Tuesday, 26 January 2016	Best practices: working with third party providers
Tuesday, 23 February 2016	Postgraduate market briefing
Tuesday, 29 March 2016	NAFSA conference and SAE policy discussion
For more details: www.siem.britishcouncil.org & guting.zheng@britishcouncil.org	