

MARKET INSIGHTS

INTRODUCTION TO UNDERGRADUATE STUDENT RECRUITMENT IN THE USA

The U.S. is the UK's 13thth largest undergraduate market (1,620 students, HESA, 2013). The market is growing in line with the US's expanding college-age population. Students trust the quality of UK provision and are often motivated by a desire to travel. The duration of UK programmes and comparative affordability are additional incentives.

The market is attractive due to the strong affinity for the UK, ease of access, English proficiency, stability, range of subjects, quality of students, comparative affordability, and low sensitivity to immigration policy. Students acclimate well to the UK and are active as both students and alumni.

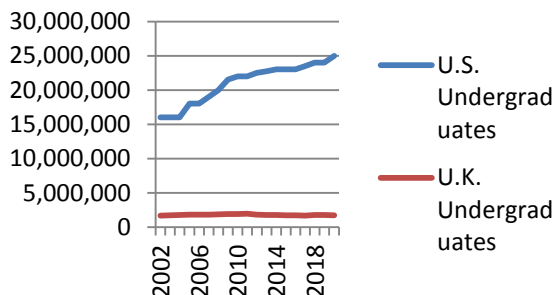
The US can be challenging due to low awareness of the UK's education system, costs associated with a mature market, a vast territory, longer recruitment cycles and strong local competition.

UNDERGRADUATE EDUCATION

An estimated 3.3 million students graduated from high school in 2014 (NCES, 2014) with approximately two thirds of these progressing to higher education. The average degree completion rate in the US is approximately 81%.

Undergraduate higher education is typically referred to as college and includes two year Associate degrees and four year Bachelor degrees. Providers include community colleges, liberal arts colleges and research universities. The majority of students attend public institutions in their home state. Approximately 27% of students go out-of-state.

MARKET PROJECTIONS



Source: NCES 2013 and HESA 2013.

UNIVERSITY GUIDANCE COMMUNITY

The USA has a decentralized and varied higher education system. The university guidance industry, comprised of counsellors, non-profit organizations and commercial vendors, has grown rapidly to help students navigate admission to higher education. Global use of agents is a controversial subject and is prohibited by federal law within the USA.

The key influencers that directly engage students are school counsellors, independent college guidance counsellors, and community based organisations.

High school counsellors are employed by secondary schools and guide students through the college application process.

Independent education counsellors (IECs) are consultants paid on a fee basis by families to aid students in their university application process.

Community based organisations are typically grass roots organisations that serve specific communities or interests, for example, serving students with under-resourced high school guidance services.

PROFESSIONAL ASSOCIATIONS

Working through associations helps reach larger audiences of counsellors. Most associations are membership based offering training, conferences, digital and print resources and distribution lists.

National Association for College Admissions Counselling (NACAC) is a national association comprised of high school college guidance counsellors, university admission staff, organisational members and independent education consultants.

Association of College Counsellors in Independent Schools (ACCIS) supports counsellors based at independent schools.

Higher Education Consultants Association (HECA) supports independent education consultants.

Independent Educational Consultants Association (IECA) supports independent education consultants who provide guidance on day and boarding schools, university, professional schools and therapeutic programmes.

The 23 **NACAC regional affiliates** extend the greatest reach into the guidance community supporting the guidance community and students at state and regional level.

TESTING ORGANISATIONS

Aptitude and university readiness testing is a common component of US admissions. The main organisations in this space include:

College Board is a private non-profit organization that administers the SAT, SAT subject tests and Advanced Placement tests.

ACT administers the ACT test, the main competitor to the SAT.

International Baccalaureate Organization (IBO) is growing in popularity in the US, currently working with over 700 high school partners in the USA.

The **Common Application** is the most used application in the US with membership from over 500 colleges & universities, 20 being from the UK.

New **UCAS** January 2016 deadline data shows six per cent increase in number of US applicants since 2015, to an all-time high of 3,260.

STUDENT ENGAGEMENT

Digital & print marketing is the main form of awareness and lead generation in the US. Face-to-face events such as fairs and high school visits are typically used to aid in conversion.

NACAC National College Fairs provide nationwide opportunities to engage with students. These typically have 100s of college students and thousands of students.

NACAC Performing and Visual Arts College Fairs specifically serve students interested in the performing and visual arts.

Regional College Fairs are hosted by NACAC regional affiliates during the autumn and spring and are typically smaller than National College Fairs.

Local college fairs are hosted by high schools and community based organisations for local audiences.

FUNDING

Public higher education is funded at the state level resulting in fee subsidies for in-state students. These subsidies are often enhanced through large scale merit scholarship programmes. As a result, out-of-state students and international students typically pay the same tuition fees. Private universities are typically funded through large endowments and tuition fees.

The majority of students use financial aid to meet the costs of attending university. Financial aid is an inclusive term covering all forms of financial assistance that students receive to fund higher education including state and federal grants, loans and work programmes as well as other sources of grants and scholarships. Government assistance is tested via the Free Application for Federal Student Aid (FAFSA). Universities also provide merit and need based financial assistance.

KEY TERMS EXPLAINED

University (undergraduate) Course College (or School) Major

www.britishcouncil.org/siem

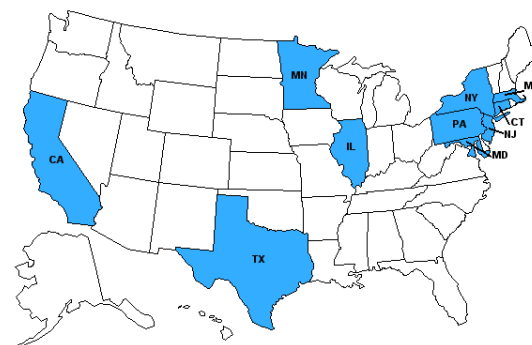
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Module	Class/course
Accommodation	Residence Life
Societies	Clubs & activities
Fraternity/Sorority	Greek Life

OUT-OF-STATE STUDENTS

Out-of-state students are good prospects for UK universities as they typically have a willingness to travel and the financial ability to take on the higher costs associated with study overseas.



Out-of-state students come from:

California	31,709
New Jersey	30,878
New York	27,954
Illinois	27,547
Massachusetts	25,823
Texas	19,389
Pennsylvania	15,724
Maryland	14,801
Connecticut	14,064
Minnesota	12,360

Source: National Center for Education Statistics

COMMON DEADLINES

Rolling Admission	From 1 September
Early Decision	1 November
Early Action	15 November
Regular Decision	1 January - 1 February
Student Decision	1 May

MARKET CHALLENGES

Limited awareness of the UK education offer, with most knowledge held at international schools or private schools serving communities.

Need to raise aspirations and build confidence that overseas study is relevant and possible through sharing information with advisors, enabling validation by sharing peer stories and marketing direct to students.

Academic readiness to bridge the gap between a 12 and 13 year system.

Perception of cost incurred with study overseas, particularly for those who have limited access to guidance resources on UK education.

The May 1 deadline for US institutions means that students will often opt-out of the UK system due to a lack of confidence in meeting their conditional offer.