

Higher Ed Benchmarks

Noel-Levitz Report on Undergraduate Enrollment Trends

2010 Application Counts at Four-Year and Two-Year Institutions

Amid the uncertain economy, how much were undergraduate applications up or down in early March 2010 compared to a year earlier? To find out, Noel-Levitz conducted a Web-based poll of accredited postsecondary institutions across the U.S. as part of the firm's ongoing series of benchmark poll reports. The poll was conducted between March 2, 2010, and March 17, 2010.

Highlights from the findings:

- For three-quarters of respondents, applications received from first-year, first-time-in-college (FTIC) undergraduates for fall 2010 were even or running ahead compared to a year earlier—but *there was considerable variability in the outcomes reported*.
- Compared to four-year institutions, two-year institutions reported the greatest variability in applications, with 25 percent seeing no change or a decline in applications and 25 percent reporting increases of 50 percent or more.
- Among four-year institutions, it was evident that institutions with smaller enrollments experienced greater variability in their results when compared to institutions with larger enrollments.

For a glimpse into how campuses are shifting their strategies in response to the economy, don't miss the summary of respondents' comments on pages 4 and 5.

Watch for more updates

Noel-Levitz plans to follow the progress of the entering class of 2010 by benchmarking deposited/confirmed students in June and final enrollment and retention in October. In addition, a companion benchmark report based on our early March 2010 poll, *E-Recruiting Practices Report*, will be released by early summer.



Noel-Levitz®



For a glimpse into how campuses are shifting their strategies in response to the economy, please see pages 4 and 5.

The source of data

This undergraduate applications report is based on a national poll conducted by Noel-Levitz via e-mail over a three-week period between March 2, 2010, and March 17, 2010.

To determine how much applications were up or down, the poll asked respondents from three higher education sectors (four-year public institutions, four-year private institutions, and two-year public institutions) to report:

- 1) The number of applications received from first-time-in-college undergraduates for fall 2010, based on their latest available application count report, and
- 2) The number of applications received from first-time-in-college undergraduates at the same time a year earlier (students who were applying for fall 2009).

The percentage changes were then calculated to identify the one-year increase or decrease in applications for each sector.

For a list of participating institutions, please see pages 6 and 7.

About the findings

How much had applications gone up or down in early March 2010 compared to a year earlier? The table on the next page shows the changes in FTIC (first-time-in-college) applications. Included is the median change along with the change at the 25th and 75th percentiles.

Following the table—on pages 4 and 5—is a brief glimpse into how campuses are shifting their strategies in response to the economy, based on the comments provided by respondents at the end of the poll.

FTIC applications even or running ahead for three-quarters of institutions

For three-quarters of respondents, applications received from first-year, first-time-in-college undergraduates for fall 2010 were even or running ahead at the time of the poll compared to a year earlier. This positive trend held true across institution types, as shown in the table below.

While the positive trend was noteworthy, so was the variability in the reports from campuses. Although half of the institutions saw gains ranging from 6.6 percent or above (for four-year public institutions) to 11.1 percent or above (for two-year public institutions), 25 percent of institutions saw zero or nearly zero change or declines. In addition, another 25 percent saw big gains of 13.6 percent or more (four-year public); 22.6 percent or more (four-year private) or 50 percent or more (two-year public).

Among four-year private institutions, it was evident that institutions with smaller enrollments* experienced greater variability in their results when compared to institutions with larger enrollments.

Table 1: Change in number of FTIC applications received as of early March 2010 compared to the same time period in 2009

	2-Year Public	4-Year Public	Small 4-Year Public	Large 4-Year Public	4-Year Private	Small 4-Year Private	Large 4-Year Private
25th percentile	0.0%	1.0%	-0.5%	2.9%	0.0%	0.0%	-0.2%
Median change	11.1%	6.6%	6.5%	6.6%	9.3%	11.1%	8.7%
75th percentile	50.0%	13.6%	14.8%	13.5%	22.6%	26.7%	17.9%

As of early March 2010, most institutions had received applications at or above their 2009 application levels—but there was considerable variability in the outcomes reported.

* To determine differences by enrollment size, four-year institutions with total enrollments equal to or less than the median enrollment size of the sample were classified as “small,” while four-year institutions with enrollment sizes above the median were classified as “large.” This median fell at 2,161 students for four-year private institutions and at 12,145 students for four-year public institutions. Breakdowns by application count were not available for two-year public institutions due to the smaller sample size for that sector (see the list of respondents on pages 6 and 7).

Findings by region show an increase for Western institutions

A separate analysis of the findings by region of the United States—East, West, South, and Midwest—identified very few regional variances. However, the analysis showed that institutions in the West reported significantly larger gains in applications relative to institutions in the East.

Respondents comment on their shifts in strategy

The following is a summary of comments offered by respondents in response to the open-ended question at the end of the poll:

“How has the economy affected your recruitment and financial aid strategies and/or your application counts?”

These comments provided by respondents at the end of the poll offer a window into the shifting higher education landscape.

Two-year public colleges: Many dealing with reduced budgets for recruiting

Although some respondents from two-year colleges seemed to resonate with a respondent who wrote, “Recruiting has become easier in the economic downturn,” many others (approximately half of the respondents who offered comments) reported cutbacks in recruitment budgets that are limiting travel and forcing greater dependence on mail and electronic communications.

“Our recruitment travel was reduced and replaced with mailings and enhanced Web information/resources,” wrote one respondent whose comments seemed to echo those of many. Another wrote: “The status of the state economy affects our budget in that the decreased budget limits our travel, postage, publication, and work-study employment.”

In the area of financial aid, most respondents from two-year colleges offered no comment other than to indicate that they are seeing increased financial need and more applications for financial aid. However, several respondents specifically reported making no changes in financial aid strategy. In addition, one respondent reported that a state grant has become a “powerful tool in our financial aid arsenal,” and another reported, “We have shifted to direct lending and have almost 40 percent more students to serve.”

Four-year public institutions: Seeking to be more efficient

The desire to become more efficient and strategic appeared to be widespread among respondents from four-year public universities who offered comments in response to the question above. The respondents reported a variety of ways they are changing their strategies to become more focused in today's competitive environment. The following approaches were mentioned by four respondents or more:

- less-and-more-targeted travel
- greater use of the Web and electronic communications
- emphasizing value in messages to prospective students and families
- investing in resources and tools to improve efficiency
- greater pursuit of out-of-state markets
- changes in financial aid strategy.

In the area of financial aid strategy, the majority of respondents from four-year public institutions did *not* report making a change. However, several respondents mentioned they were emphasizing affordability and scholarships while others mentioned concentrating more attention on supplying sufficient aid to meet need.

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Two additional points that were mentioned by respondents from four-year public institutions:

- Several respondents speculated that more students this year may be interested in staying closer to home to attend college.
- A few respondents noted delays they were experiencing, such as slower deposits from students in general and later applications from transfers.

Four-year private institutions: *Many dealing with pricing pressure*

Changes to financial aid strategy were mentioned most frequently among the comments from four-year private institution respondents (approximately one-third of respondents who offered comments mentioned this). Many also reported that more students are applying for aid and that families have become more cost-conscious.

“These days, most conversations with prospects start and end around the family finances,” wrote one respondent whose comments seemed to reflect those of many. Another commented: “Every applicant is shopping for the best deal.”

To respond to the financial aid pressure, respondents from four-year private institutions mentioned a range of interventions:

- increased discounting via additional merit and need-based awards*
- earlier announcements of financial aid awards
- emphasizing value, affordability, and graduate outcomes in messages to prospective students and families
- more frequent contact with prospective students
- more targeted financial aid awarding
- less selectivity in admissions
- a variety of additional yield strategies ranging from special events to more contacts to more intentional communications from the financial aid office.

* most frequently mentioned intervention

Like their counterparts from four-year public institutions, some respondents from four-year private institutions also reported becoming more budget-minded and focused in their recruitment programs through:

- less-and-more-targeted travel
- greater use of the Web and electronic communications
- investing in resources and tools to improve efficiency.

In addition, a number of respondents reported they were seeing delays in deposits, similar to the responses from a few respondents at four-year public institutions.

The respondents from four-year private institutions described a range of interventions they are using to address increased pressure on pricing.

Responding institutions

Representatives from 306 U.S. colleges and universities participated in Noel-Levitz's national electronic poll of undergraduate admissions applications, which was distributed to 3,091 degree-granting institutions in March 2010. The respondents represented 72 four-year public institutions, 204 four-year private institutions, and 30 two-year institutions. The names of the participating institutions appear below.

Four-year public institutions

Arkansas State University (AR)
Ball State University (IN)
Bridgewater State College (MA)
California Polytechnic State University-
San Luis Obispo (CA)
Clayton State University (GA)
Delta State University (MS)
East Stroudsburg University of
Pennsylvania (PA)
Eastern Kentucky University (KY)
Eastern New Mexico University Main
Campus (NM)
Florida Atlantic University (FL)
Fort Lewis College (CO)
Francis Marion University (SC)
Gainesville State College (GA)
Georgia Southern University (GA)
Georgia State University (GA)
Humboldt State University (CA)
Illinois State University (IL)
Indiana University Bloomington (IN)
Indiana University Southeast (IN)
Indiana University-Purdue University
Indianapolis (IN)
Lewis-Clark State College (ID)
Longwood University (VA)
Miami University (OH)
Michigan State University (MI)
Michigan Technological University (MI)
Missouri University of Science &
Technology (MO)
Missouri Western State University (MO)
New College of Florida (FL)
New Mexico Institute of Mining and
Technology (NM)
North Carolina Agricultural and Technical
State University (NC)
Northern Michigan University (MI)
Portland State University (OR)
Ohio State University Main
Campus, The (OH)
Purdue University Main Campus (IN)
South Dakota School of Mines and
Technology (SD)
Southern Illinois University
Carbondale (IL)
Southern Illinois University
Edwardsville (IL)
State University of New York at
Fredonia (NY)
State University of New York College
at Oswego (NY)
State University of New York College
at Plattsburgh (NY)
State University of New York College
of Environmental Science and
Forestry (NY)

Sul Ross State University (TX)
Tarleton State University (TX)
Texas A & M University (TX)
Texas Tech University (TX)
Towson University (MD)
University of Alabama at Birmingham (AL)
University of Central Missouri (MO)
University of Cincinnati Main Campus (OH)
University of Hawaii at Manoa (HI)
University of Hawaii Maui College (HI)
University of Houston (TX)
University of Iowa (IA)
University of Louisiana at Lafayette (LA)
University of Maine at Farmington (ME)
University of Maine at Fort Kent (ME)
University of Michigan-Ann Arbor (MI)
University of Michigan-Dearborn (MI)
University of Missouri-Kansas City (MO)
University of New Mexico Main
Campus (NM)
University of Northern Iowa (IA)
University of Pittsburgh at Bradford (PA)
University of Rhode Island (RI)
University of South Carolina Columbia (SC)
University of Southern Maine (ME)
University of Texas at Dallas, The (TX)
University of Texas-Pan American (TX)
University of Utah, The (UT)
University of Vermont (VT)
University of Virginia (VA)
Washburn University (KS)
Westfield State College (MA)

Four-year private institutions

Alverno College (WI)
American International College (MA)
American University (DC)
Aquinas College (MI)
Art Institute of Boston at Lesley
University, The (MA)
Ashland University (OH)
Atlanta Christian College (GA)
Augsburg College (MN)
Azusa Pacific University (CA)
Babson College (MA)
Baptist Bible College and Seminary (PA)
Baptist University of the Americas (TX)
Baylor University (TX)
Belhaven University (MS)
Beloit College (WI)
Berea College (KY)
Bethany College (KS)
Bethel College (IN)
Bryan College (TN)
Butler University (IN)

Caldwell College (NJ)
California College of the Arts (CA)
Canisius College (NY)
Capital University (OH)
Carroll College (MT)
Carroll University (WI)
Carson-Newman College (TN)
Cedarville University (OH)
Centre College (KY)
Charleston Southern University (SC)
Chestnut Hill College (PA)
Cleveland Chiropractic College-
Kansas City (KS)
Cleveland Institute of Art (OH)
College of New Rochelle, The (NY)
College of Notre Dame of
Maryland (MD)
Colorado Christian University (CO)
Columbia College (SC)
Concordia University, St. Paul (MN)
Cornish College of the Arts (WA)
Creighton University (NE)
Curry College (MA)
Dean College (MA)
Defiance College, The (OH)
Delaware Valley College (PA)
Design Institute of San Diego (CA)
Dominican University of California (CA)
Dowling College (NY)
Drew University (NJ)
Eckerd College (FL)
Emmaus Bible College (IA)
Eureka College (IL)
Evangel University (MO)
Faith Baptist Bible College and
Seminary (IA)
Florida Institute of Technology (FL)
Florida Southern College (FL)
Franciscan University of
Steubenville (OH)
Franklin W. Olin College of
Engineering (MA)
Freed-Hardeman University (TN)
Fresno Pacific University (CA)
Gardner-Webb University (NC)
Geneva College (PA)
Gordon College (MA)
Grand View University (IA)
Guilford College (NC)
Gustavus Adolphus College (MN)
Hamline University (MN)
Hawaii Pacific University (HI)
Heidelberg University (OH)
Hiram College (OH)
Holy Family University (PA)
Houghton College (NY)

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you to those who
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Houston Baptist University (TX)
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 Indiana Tech (IN)
 Indiana Wesleyan University (IN)
 Iowa Wesleyan College (IA)
 Jacksonville University (FL)
 Jamestown College (ND)
 John Brown University (AR)
 Johnson & Wales University (RI)
 Kansas Wesleyan University (KS)
 Kentucky Mountain Bible College (KY)
 Keystone College (PA)
 Laguna College of Art & Design (CA)
 Lakeland College (WI)
 Lancaster Bible College (PA)
 Lancaster General College of Nursing
 and Health Sciences (PA)
 Lehigh University (PA)
 Lenoir-Rhyne University (NC)
 Lincoln Christian University (IL)
 Linfield College (OR)
 Loras College (IA)
 Lubbock Christian University (TX)
 Lynchburg College (VA)
 MacMurray College (IL)
 Malone University (OH)
 Marietta College (OH)
 Marist College (NY)
 Marquette University (WI)
 Marymount Manhattan College (NY)
 Marymount University (VA)
 Marywood University (PA)
 McPherson College (KS)
 Medaille College (NY)
 Mercyhurst College (PA)
 Methodist University (NC)
 Miles College (AL)
 Milligan College (TN)
 Mills College (CA)
 Milwaukee Institute of Art &
 Design (WI)
 Misericordia University (PA)
 Monmouth College (IL)
 Mount Ida College (MA)
 Mount Mercy College (IA)
 Mount Saint Mary College (NY)
 Mount St. Mary's College (CA)
 Mount St. Mary's University (MD)
 Mount Vernon Nazarene
 University (OH)
 Newman University (KS)
 Nichols College (MA)
 North Central College (IL)
 Northwest Nazarene University (ID)
 Northwestern College (IA)
 Northwestern College (MN)
 Oklahoma Baptist University (OK)
 Oklahoma Christian University (OK)
 Oklahoma City University (OK)
 Pacific Northwest College of Art (OR)
 Pacific University (OR)
 Park University (MO)
 Patten University (CA)

Peace College (NC)
 Post University (CT)
 Presbyterian College (SC)
 Providence College (RI)
 Quincy University (IL)
 Randolph-Macon College (VA)
 Regis College (MA)
 Rhode Island School of Design (RI)
 Ripon College (WI)
 Robert Morris University (IL)
 Robert Morris University (PA)
 Rockhurst University (MO)
 Rocky Mountain College (MT)
 Rose-Hulman Institute of
 Technology (IN)
 Saint Joseph College (CT)
 Saint Joseph's University (PA)
 Saint Louis University (MO)
 Saint Mary's College of California (CA)
 Saint Michael's College (VT)
 Saint Norbert College (WI)
 Saint Vincent College (PA)
 San Diego Christian College (CA)
 Savannah College of Art and
 Design (GA)
 Seattle University (WA)
 Shimer College (IL)
 Siena College (NY)
 Siena Heights University (MI)
 Sierra Nevada College (NV)
 South Florida Bible College (FL)
 Southern Adventist University (TN)
 Southern Virginia University (VA)
 Southwestern Assemblies of God
 University (TX)
 Spelman College (GA)
 St. Bonaventure University (NY)
 St. Catharine College (KY)
 St. Catherine University (MN)
 St. Edward's University (TX)
 Sterling College (KS)
 Stetson University (FL)
 Susquehanna University (PA)
 Tabor College (KS)
 Tennessee Wesleyan College (TN)
 Transylvania University (KY)
 Trinity International University (IL)
 Tufts University (MA)
 University of Dallas (TX)
 University of Dayton (OH)
 University of Denver (CO)
 University of Evansville (IN)
 University of Findlay, The (OH)
 University of La Verne (CA)
 University of Mary Hardin-Baylor (TX)
 University of New England (ME)
 University of Notre Dame (IN)
 University of Richmond (VA)
 University of Saint Francis (IN)
 University of Saint Mary (KS)
 University of Scranton, The (PA)
 University of St. Francis (IL)
 University of Tampa (FL)

University of the Arts, The (PA)
 University of the Ozarks (AR)
 University of the Southwest (NM)
 Utica College (NY)
 Valparaiso University (IN)
 Wartburg College (IA)
 Western New England College (MA)
 Westminster College (UT)
 Whitworth University (WA)
 William Jewell College (MO)
 Wilson College (PA)
 Wisconsin Lutheran College (WI)
 Wofford College (SC)
 Xavier University (OH)
 Yeshiva University (NY)

Two-year public institutions

Aims Community College (CO)
 Angelina College (TX)
 Arapahoe Community College (CO)
 Beal College (ME)
 Butler County Community
 College (PA)
 Cape Cod Community College (MA)
 Colorado Mountain College (CO)
 Community Colleges of Spokane
 District 17 (WA)
 DeKalb Technical College (GA)
 Edgemont Community College (NC)
 Harper College (IL)
 Labette Community College (KS)
 Lenoir Community College (NC)
 Linn-Benton Community College (OR)
 Marion Technical College (OH)
 Mississippi Gulf Coast Community
 College (MS)
 New Mexico Junior College (NM)
 Normandale Community College (MN)
 North Country Community
 College (NY)
 North Iowa Area Community
 College (IA)
 Northeastern Junior College (CO)
 Northwest Kansas Technical
 College (KS)
 Northwest State Community
 College (OH)
 Oakland Community College (MI)
 Onondaga Community College (NY)
 South Florida Community
 College (FL)
 South Louisiana Community
 College (LA)
 Southwestern Indian Polytechnic
 Institute (NM)
 Springfield Technical Community
 College (MA)
 Sullivan County Community
 College (NY)

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Questions about this report?

We hope you have found this report helpful and informative. If you have questions or would like more information about the findings, please contact Jim Mager, Noel-Levitz associate vice president, at 1-800-876-1117 or jim-mager@noellevitz.com.

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A trusted partner to higher education, Noel-Levitz is committed to helping institutions meet their goals for enrollment and student success. Our consultants work side by side with campus executive teams to facilitate planning and to help implement the resulting plans.

For more than 20 years, we have conducted national surveys to assist campuses with benchmarking their performance. This includes benchmarking marketing/recruitment and student success outcomes and practices, monitoring student and campus usage of the Web and electronic communications, and comparing institutional budgets and policies for enrollment management. There is no charge or obligation for participating and responses to all survey items are strictly confidential. Participants have the advantage of receiving the findings first, as soon as they become available.

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