



END OF CYCLE REPORT 2018

Offer-making

CHAPTER 2

UCAS



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INTRODUCTION

This report is part of the first release of UCAS' End of Cycle Reports for the 2018 undergraduate admissions cycle.

As an independent charity, UCAS publishes timely data and analysis about demand for, and progression and admission to higher education, to contribute to public debate about education, access, and social mobility.

This year, we are publishing our end of cycle data and analysis in four releases, between 29 November and 31 January 2019, with the first release published 25 working days after the 2018 cycle closed. Weekly, between 29 November and 13 December, we will publish a series of detailed analysis reports covering the entire 2018 cycle. These will cover acceptance, offer, and entry rates, and differences by applicant background. On 13 December, we will also publish a series of analysis reference tables and data sets for the 2018 cycle. On 31 January, we will publish end of cycle provider-level application data, together with provider-level data on unconditional offer-making. This release will include analysis of trends in application rates by country, sex, and background, with recent years for comparison, and further analysis of offer-making.

It is in the context of this series of publications about the admissions cycle for 2018, that this report provides an analysis of offer-making patterns. The purpose of the report is to provide an overview of offer-making in the 2018 cycle, set against the context of the 2017 cycle. Following this is an analysis into how offer rates change with age group, domicile, country, predicted grades, and provider tariff. Given the strong association with offer rates and application route, and in keeping with previous End of Cycle Reports, this report focuses on main scheme applicants and applications, to better identify changes in provider behaviour. Main scheme applications comprise the majority of all applications, around 95.8 per cent of all in the 2018 cycle. Applicants of all ages and from all domiciles are included in this analysis, unless otherwise stated.



2. OFFER-MAKING TO MAIN SCHEME APPLICANTS IN 2018

2.1 Falls in numbers of offers

driven by fall in applications

This cycle had 2 per cent fewer main scheme applicants than in 2017, partially driven by a 2.5 per cent reduction in the population of UK 18-year-olds, meaning a year-on-year fall in the total number of offers is not unexpected. A total of 636,815 applicants made a combined 2,726,670 applications before the 30 June deadline during the 2018 cycle. This is a decrease of 66,680 applications compared to 2017.

Higher education providers made just over 1.9 million offers to main scheme applicants, a drop of 13,885 (0.7 per cent) compared to the 2017 cycle. However, the proportion of all main scheme applications which have received an offer this cycle (the offer rate) has increased by 1.3 percentage points, to 70.0 per cent.

Consistent with the fall in number of applicants and the increased offer rate, the number of applicants receiving no offers, and the number of applicants receiving at least one offer each, decreased this year, by 12.3 per cent and 0.9 per cent respectively, compared to 2017. The number of applicants receiving offers to all their choices increased by less than 0.1 per cent, to 246,460, as shown in Figure 1.

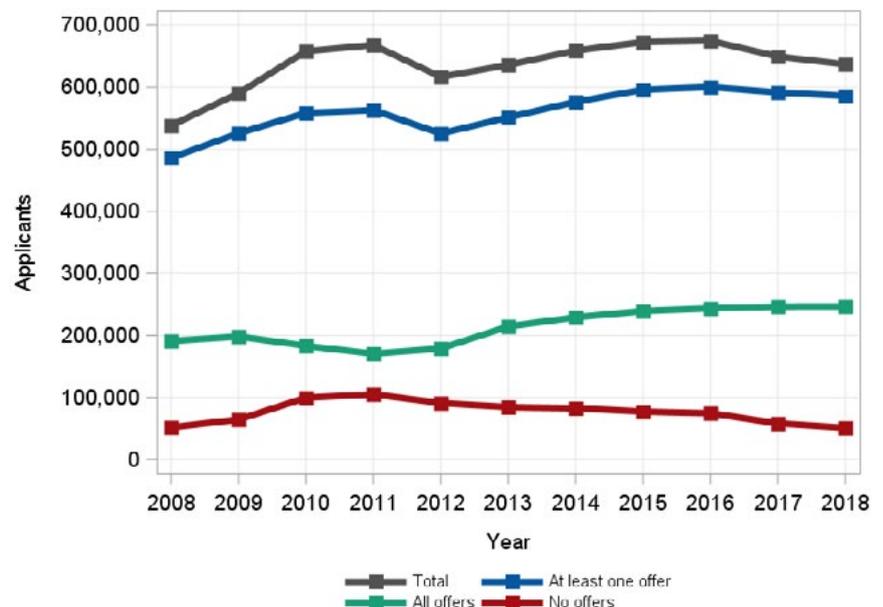


FIGURE 1:

Number of main scheme applicants (applying by the 30 June deadline) by the number of offers received

2.2 Rise in the proportion of applicants

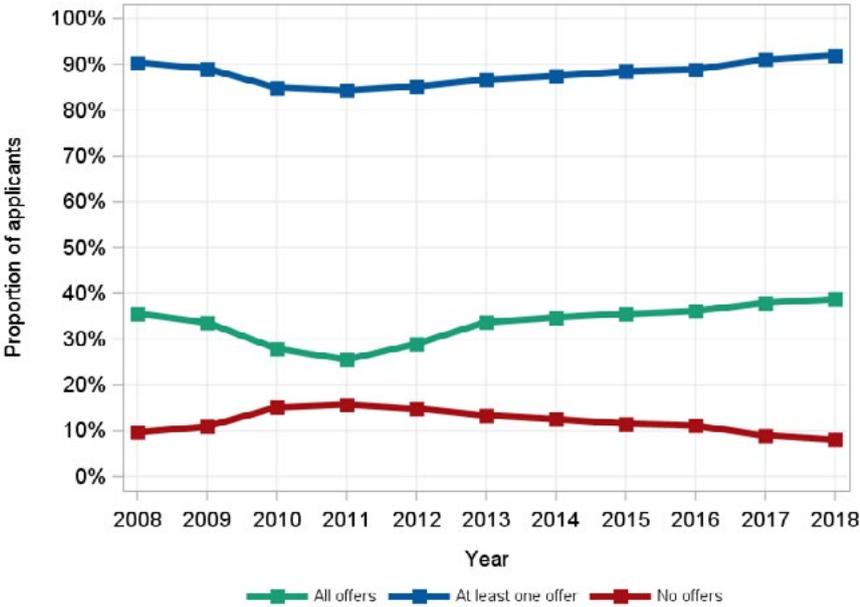
receiving one or more offers

While absolute numbers of offers made are prone to variation in line with the absolute number of applications, by analysing the offer rate (the proportion of applications that receive an offer), we can make more meaningful comparisons across cycles.

Accordingly, Figure 2 shows the percentage of applicants for each of the years from 2008 to 2018. This confirms shows that, at 92 per cent, proportionally more main scheme applicants are receiving one or more offers than at any point in the last decade. The proportion of applicants not receiving an offer has decreased by 7.7 percentage points since 2011. A record 38.7 per cent of applicants received offers for all their choices in the 2018 cycle.

FIGURE 2:

Proportion of applicants by the number of offers they received

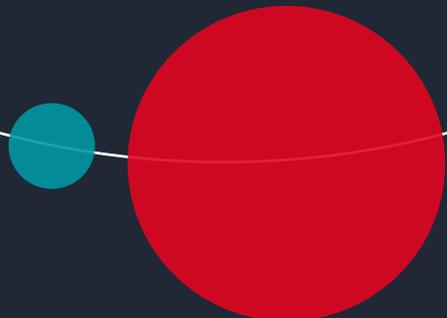


The remainder of this report analyses how offer rates vary by applicant age groups, domicile and country, predicted grades, and higher education provider tariff groups. Due to the variation in applicant numbers across cycles the offer rate is a more useful measure to use when comparing trends over time and is therefore the primary metric used throughout the remainder of this report.

3



**OFFER
RATES FOR
APPLICANT
GROUPS**



3.1 Offer rates increase for all applicant ages, with largest increases for those aged 26 and over

Considering applicants from all domiciles, offer rates (the proportion of all applications that receive an offer) increased in 2018 across all reported age groups (Figure 3).

There is a clear pattern in offer rates across age groups, with 18 year olds having the highest offer rate. Lower offer rates are observed for older age groups, with those aged 26 and over having the lowest offer rate.

There have been increases in offer rates across all age groups this cycle, as would be anticipated given the decreases in main scheme applicants in each group¹. The larger increases are seen for the older age groups, and those aged 26 and over had a 4.5 percentage point increase in offer rate this cycle. In contrast, the increase was only 0.4 and 0.5 percentage points for 18 year olds and 19 year olds respectively. Those aged 20 saw an increase of 1.1 percentage points, while the 21 to 25 group had an increase of 1.9 percentage points.

Different aged applicants typically present with different qualifications and apply to different courses². Both of these factors could influence the outcomes when attempting to analyse further differences in offer rates. As such, considering only 18 year olds (the largest group) gives a more consistent set of applicants, and are therefore the focus of the remainder of this report.

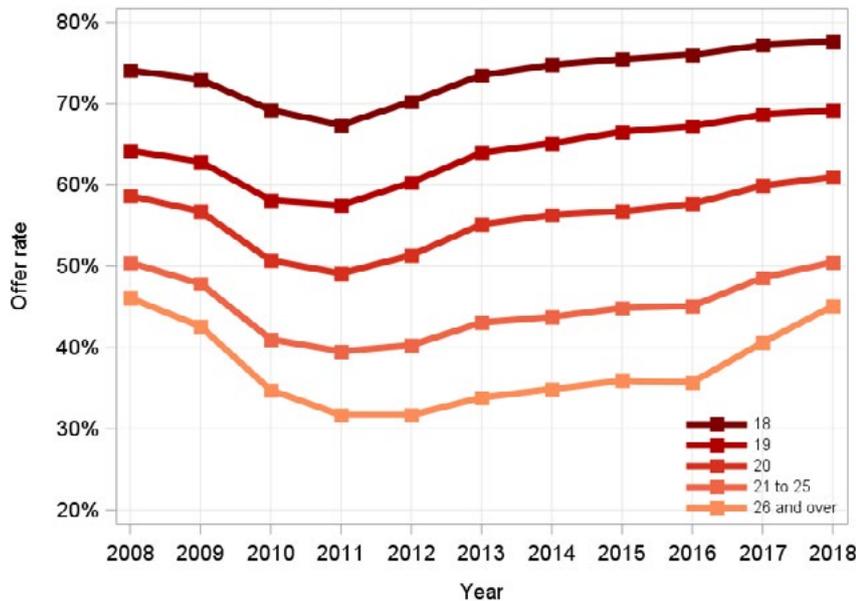


FIGURE 3:
Offer rate for main scheme applications by age group

¹ www.ucas.com/corporate/data-and-analysis/ucas-undergraduate-releases/2018-cycle-applicant-figures-june-deadline

² <https://www.ucas.com/file/175936/download?token=UVSBJLVD> (PDF)

3.2 UK domiciled applicants drive the sector-wide offer rate increase

Offer rates vary by domicile. As previously reported, the sector-wide offer rate has increased this cycle. This has been driven predominantly by the offer rate increase for applicants domiciled in the UK (see Figure 4). UK domiciled 18 year olds accounted for 85 per cent of the 18 year old applicants in the 2018 cycle. Therefore, the offer rate increase for this group is likely to mask trends seen in the other, smaller, groups of applicants included in Figure 4.

Offer rates for EU domiciled applicants remained relatively stable this cycle, in contrast to an average 1.5 per cent growth from 2010 to 2017. While there has been a 4.4 per cent increase in 18 year old EU domiciled applicant numbers in 2018, the number of applications made by this group has only increased by 3.6 per cent, as each applicant made slightly fewer applications this year compared to 2017. Consequently, the offer rate to EU domiciled applicants has remained broadly stable compared to 2017. Furthermore, 4.7 per cent of all provider offers in 2017 to 18 year olds were made to EU domiciled applicants, increasing to 4.8 per cent this cycle.

Although record numbers of offers were made to international applicants (excluding EU), the offer rate to this group experienced its first decline since 2010. There were 14.2 per cent more 18 year old non-EU international applicants this cycle, and the 13 per cent increase in the number of offers made (11,120 additional offers) was not enough to offset the increase in applications, leading to the slight decline in the offer rate.

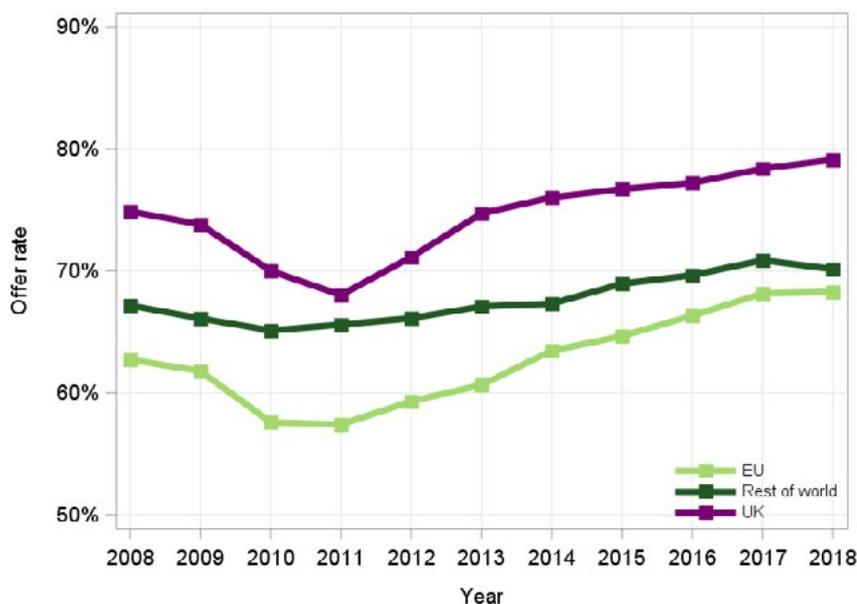


FIGURE 4:

Offer rate for main scheme applications by domicile (18-year-old applicants)

3.3 Offer rates increase for applicants

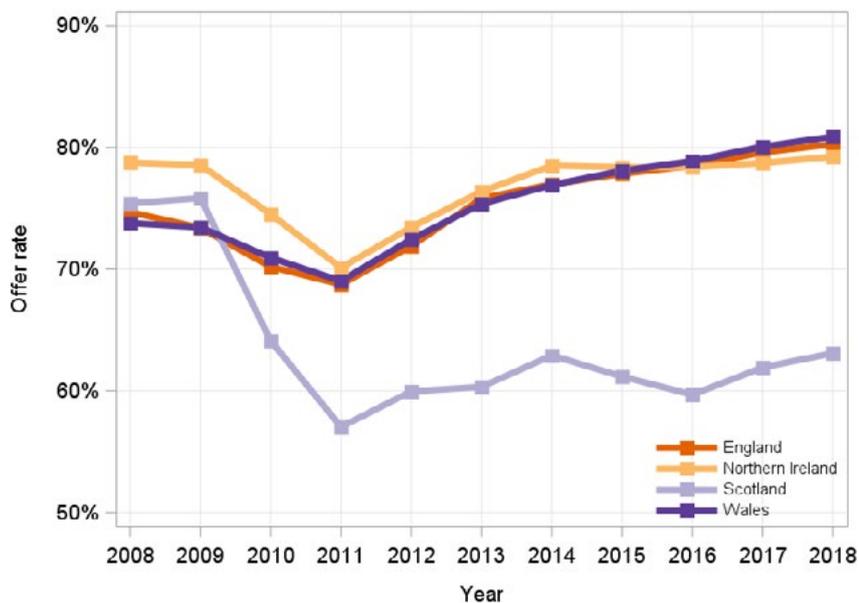
from all UK countries

Offer rates for all individual UK countries have increased this cycle, in line with the overall offer rate increase seen for applications from UK domiciled applicants. The offer rates for English and Welsh applicants have continued their small, but steady increase seen since the 2013 cycle, broadly in line with one another, with each now being above 80 per cent for the first time. Northern Irish applicants have seen a small offer rate increase of 0.6 percentage points to 79.3 per cent. The offer rate for Scottish applicants is 63.1 per cent this year, an increase of 1.2 percentage points from 2017. A large proportion of Scottish applicants apply solely to Scottish providers. Due to the number controls in place at Scottish providers for Scottish and EU students, offer rates for Scottish applicants would be expected to be lower (not all higher education in Scotland is recorded by UCAS – see the note at the end of this report for further details).

Figure 5 shows offer rates by applicant country. A similar analysis using provider, instead of applicant, country yields similar patterns. This cycle, Welsh providers' offer rates increased from 86.4 per cent to 87.3 per cent. There was also a similar increase for English providers (79.5 per cent to 80.3 per cent). On the other hand, Northern Irish and Scottish providers' rates increased less dramatically, to 82.1 per cent and 63.7 per cent respectively.

FIGURE 5:

Offer rate for main scheme applications by country (UK 18-year-old applicants)



3.4 Offer rates for applicants predicted lower grades rise, offer rates

to applicants with higher predicted grades broadly stable

Applicants' predicted grades are important, as they constitute much of the information higher education providers have available when deciding who to make offers to. Due to the wide variety of qualification types and combinations, only A levels are considered here due to their relative stability over the period of analysis. To enable analysis of trends consistently, only English applicants taking three predicted A levels are included since they represent a group who typically do not hold any other qualifications that will be considered as part of evidencing academic potential for a course.

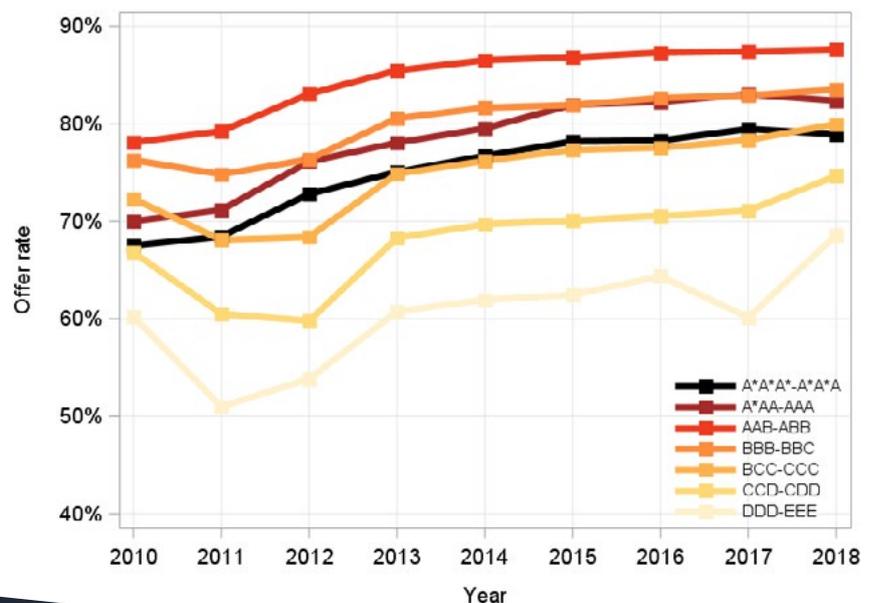
For those predicted the very top grades (AAA or above), the offer rate has decreased slightly. Although offer rates for this group have been broadly stable since 2015, this is the first year in which there has been a decrease, albeit marginal. This decrease is related to the courses and institutions to which this group of applicants are applying. Previous analysis undertaken at the October 15 deadline shows that at this point in the 2018 cycle the number of applicants had increased by 7 per cent compared to 2017. The courses with October deadlines are those at the University of Cambridge or the University of Oxford; or are for Medicine, Veterinary Science, or Dentistry courses, which typically have higher-grade requirements. As a result of the bounded number of places for these courses, and the increasingly large number of applicants applying for places, it is clear that the offer rate (offers per hundred applications) will necessarily be lower.

Figure 6 shows that those applicants predicted to receive the equivalent of A*A*A* or A*A*A have a lower offer rate than those predicted grades of BCC – CCC. This can be explained by the effect of increased applications for the 15 October deadline mentioned above. If the analysis is repeated without applicants who applied to courses with an October deadline, the highest offer rates are to those predicted the highest grade profiles, and decrease through to those predicted to achieve lower grades.

Those predicted lower grades (CCD – EEE) have seen their offer rates increase markedly. It can be seen from Figure 6 that the lower the predicted grade group, the bigger the offer rate increase. This may be as a response to a broadening out of offer-making by lower tariff providers, due to the reduced supply of applicants, as explored in the following section.

FIGURE 6:

Offer rate for main scheme applications by predicted A-level grades for English 18-year-old applicants predicted exactly three A-levels



³ www.ucas.com/file/130826/download?token=dTbAdkWd (PDF)

⁴ www.ucas.com/file/130826/download?token=dTbAdkWd (PDF)

4. OFFER-MAKING BY PROVIDERS

4.1 Offer rates continue to increase for lower and medium tariff providers, in contrast to a minor decrease for higher tariff providers

Higher education providers across the UK can be grouped based on the average levels of attainment of their UK 18-year-old acceptances, summarised through UCAS Tariff points. Higher, medium and lower tariff groups are designed to enable aggregate analytical reporting. They were produced by calculating the average UCAS Tariff points of UK 18-year-olds placed at a provider over the 2004 to 2011 cycles. They are not used to classify an individual provider, and nor do they adequately reflect the variation in typical attainment across different courses in some providers. Nevertheless, they do enable a consistent group for reporting, that highlights any trends among groups of providers with commonality of average attainment of accepted applicants.

The previous section described the association predicted grades had with applicants' offer rates. As a result of the correlation between tariff group of provider and applicant attainment, we analyse offer rate by tariff group.

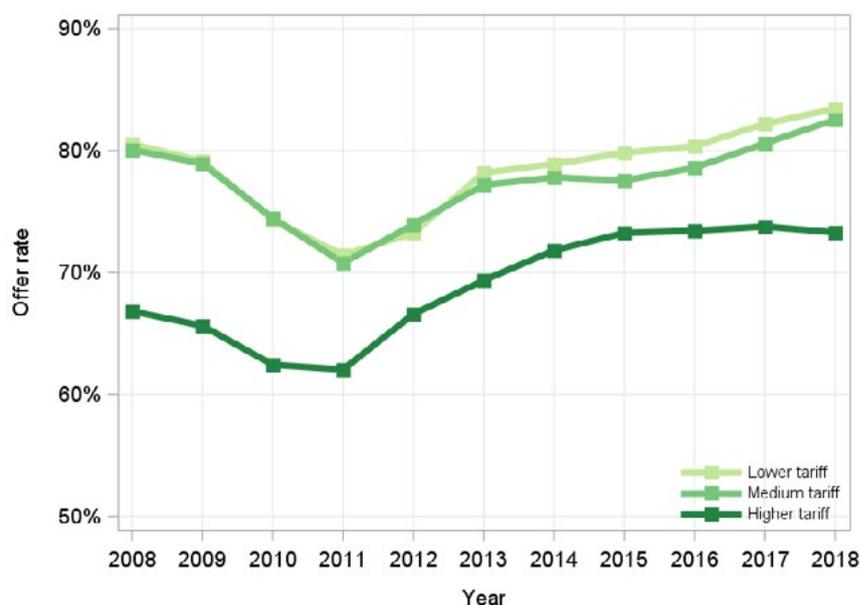
Figure 7 shows the offer rate for UK 18 year olds by tariff group. Offer rates are increasing for both lower and medium tariff providers, whilst levelling off for higher tariff providers. As there are fewer applicants overall this cycle, and the broadly consistent distribution of level 3 attainment, there will be fewer applicants who meet the typical attainment profile for each provider. Providers may, therefore, need

to increase offer rates to retain similar number of acceptances to previous cycles, and it may be necessary to broaden the range of applicants to whom offers are made. This would help explain the increase seen in the offer rates for applicants predicted lower grade profiles (Figure 6). Moreover, individual applicants applying solely to low and/or medium tariff providers were the most likely to receive offers for all their choices.

The offer rate has increased for both lower (+1.2 percentage points) and medium tariff (+1.9 percentage points) providers. There is less change in the number of applications for the higher tariff providers; although applications fell for this group, they did so by only 0.4 per cent from 2017, compared to 3.9 per cent and 2.5 per cent for lower and medium tariff providers respectively.

FIGURE 7:

Offer rate for main scheme applications by provider tariff band for 18-year-old UK applicants



A NOTE ON NUMBERS IN SCOTLAND

UCAS covers the overwhelming majority of full-time undergraduate provision for people living in England, Wales, and Northern Ireland, so the statistics on acceptances or entry rates can be taken as being very close to all recruitment to full-time undergraduate higher education. In Scotland, there is a substantial section of higher education provision not included in UCAS' figures. This is mostly full-time higher education provided in further education colleges, which represents around one third of young full-time undergraduate study in Scotland, and this proportion varies by geography and background within Scotland. Accordingly, figures on entry rates or total recruitment in Scotland reflect only the part of full-time undergraduate study that uses UCAS.

In 2014, there were fewer very late acceptances than in other cycles recorded in the UCAS data for some Scottish providers. These changes may mean the number of applicants and acceptances to Scottish UCAS providers in 2014, recorded through UCAS, could be understated by up to 2,000, compared to how applicants and acceptances have been reported in recent cycles. This means that comparing 2014 applicants and acceptances for Scottish providers (or those from Scotland) to other cycles, may not give an accurate measure of change.

In 2015, around 120 courses at Scottish providers which were previously part of the UCAS Teacher Training scheme, moved into the UCAS Undergraduate scheme. As such, the number of applicants and acceptances to Scottish providers in 2015 recorded through UCAS will include those which were previously part of UCAS Teacher Training. This means, comparing 2015 applicants and acceptances for Scottish providers (or those from Scotland, particularly those aged 21 or over) to previous cycles, may not give a like-for-like measure of change.



GLOSSARY

30 June application deadline	The final date by which an applicant can submit up to five applications to study on a course of higher education through the UCAS main scheme. Applicants who apply after this date go directly into Clearing.
Acceptance	An applicant who, at the end of the cycle, has been placed for entry into higher education.
Age	This analysis uses country-specific age definitions that align with the cut-off points for school and college cohorts in the different administrations of the UK. For England and Wales, ages are defined on 31 August, for Northern Ireland on 1 July, and for Scotland on 28 February the following year. Defining ages in this way matches the assignment of children to school cohorts. For applicants outside the UK, a cohort cut-off of 31 August has been used.
Applicant	A person who has made an application in the UCAS system. Counts of applicants include those applying through the main scheme, late applicants direct to Clearing, and Records of Prior Acceptance (RPAs).
Main scheme	The main UCAS Undergraduate application scheme through which up to five course choices can be applied for. This opens in September, and closes to new applications on 30 June the following year.
Offer	Provider decision to grant a place to an applicant. May be subject to the applicant satisfying academic and/or other criteria.
Offer rate	The percentage of applications which received an offer. It is at the 'application level' as it is an aggregate across all applications, regardless of the number of choices an individual applicant may have made.
Provider	A higher education provider – a university or college.

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