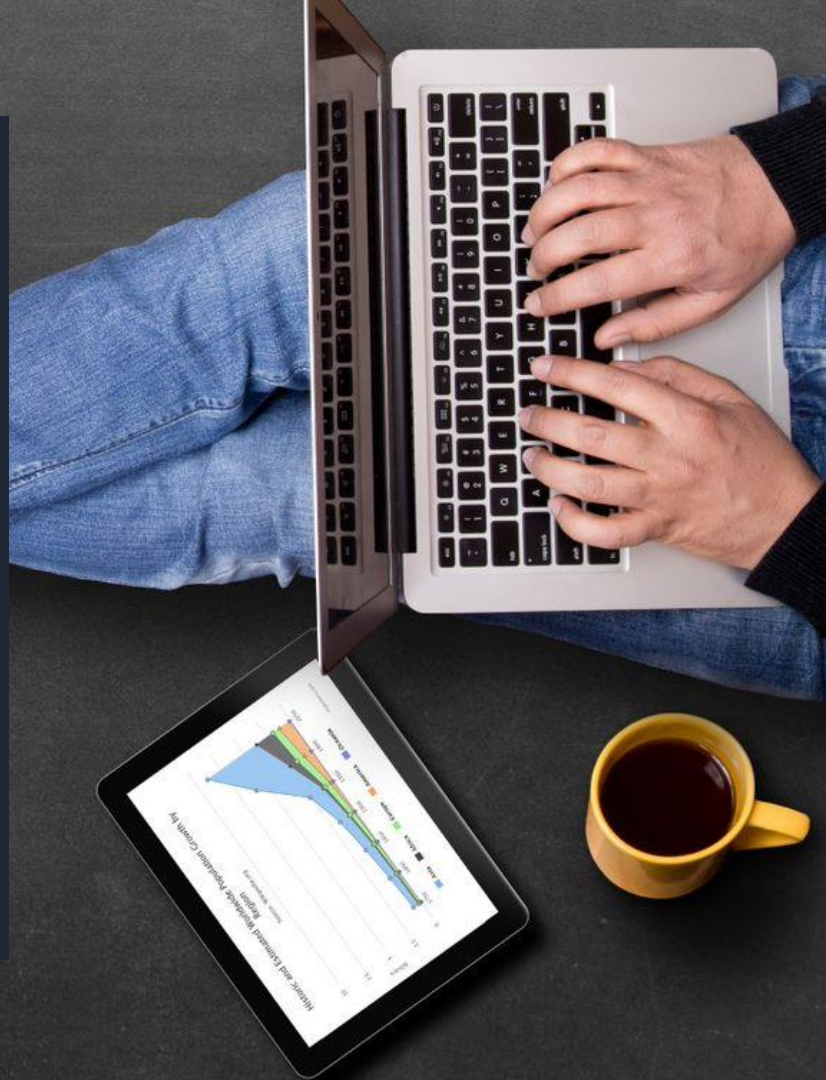


# Insight Newsletter

February 2023

UCAS



## Welcome to the UCAS Insight Newsletter – February 2022

The January deadline has come and gone, open days are yet to kick off, and back-to-school sales are still a while away. But with every passing cycle, we see early engagement getting more and more vital. Students are still busy researching, and every one of them is busy in one way or another.

Current **undergraduates** are firmly in house hunting mode for September. **Pre-applicants** are planning their open day schedules, ahead of exhibition season starting next month. And **applicants** are the busiest of all, as they start receiving their offers, narrowing them down, and deciding how and where to spend the next few years of their lives...

For us, it's been all analysts on deck as we digest new student behaviours spotted during the January deadline period. And now, with more and more activity post-January every year, we've been looking into the best options for you to engage with this rapidly growing market.

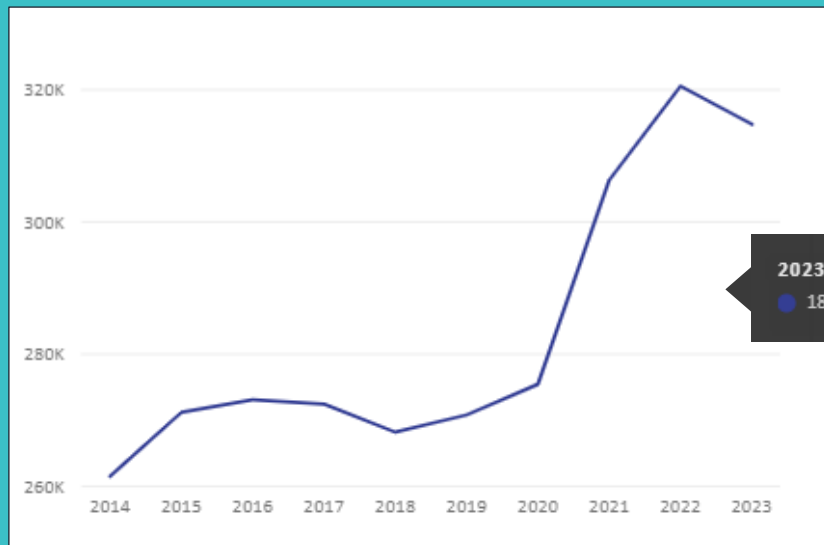
**Let's get stuck in.**

# 2023 January deadline analysis

Key headlines from the 2023 January Equal Consideration deadline

## 2023 JANUARY DEADLINE ANALYSIS

Number of applicants (UK 18-year-olds)

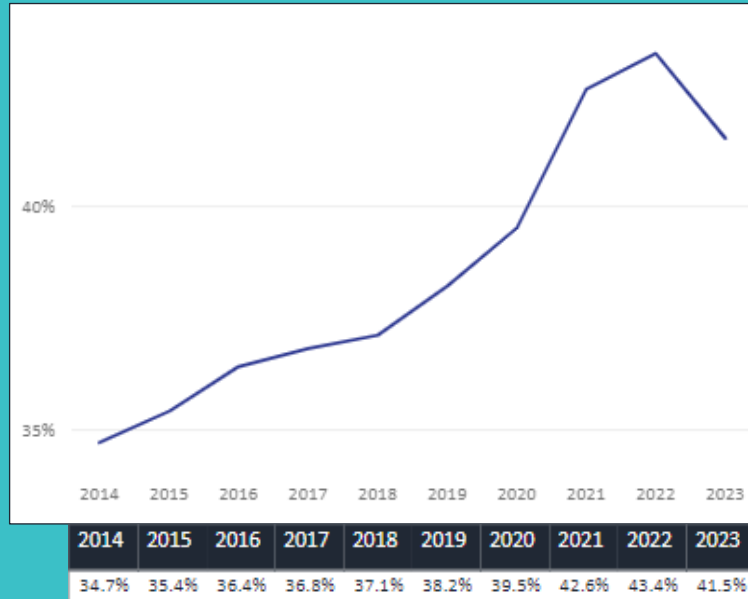


Figures for the January Equal Consideration Deadline show 314,660 UK 18-year-olds have applied, down slightly from 320,420 at the same point in the cycle last year (-1.8%) but significantly up on the pre-pandemic figure of 275,300 in January 2020 (+14.3%).



# 2023 JANUARY DEADLINE ANALYSIS

Entry rate (UK 18-year-olds)



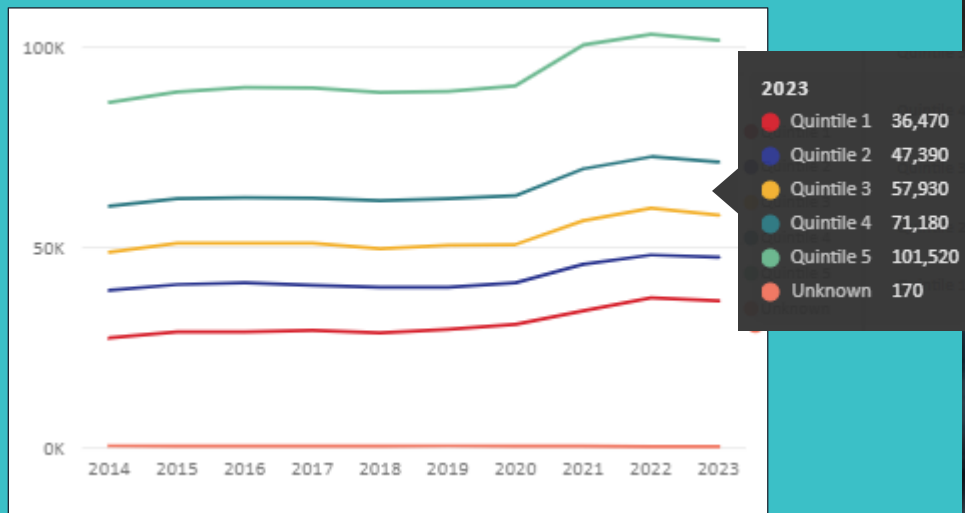
This puts the application rate for UK 18-year-olds at 41.5% compared to 43.4% in 2022 but up from 39.5% in 2020.





## 2023 JANUARY DEADLINE ANALYSIS

Number of applicants by POLAR4 (UK 18-year-olds)



While the application rate gap between the most and least disadvantaged (POLAR4) UK 18-year-olds has widened slightly (2.16 compared to 2.10 in 2022), the number of applicants from the most disadvantaged areas in the UK (POLAR4 quintile 1) is still the highest on record at 36,470, which is up +19.1% on 2020 figures.

# 2023 JANUARY DEADLINE ANALYSIS

## Number of applicants for Non-EU & EU countries

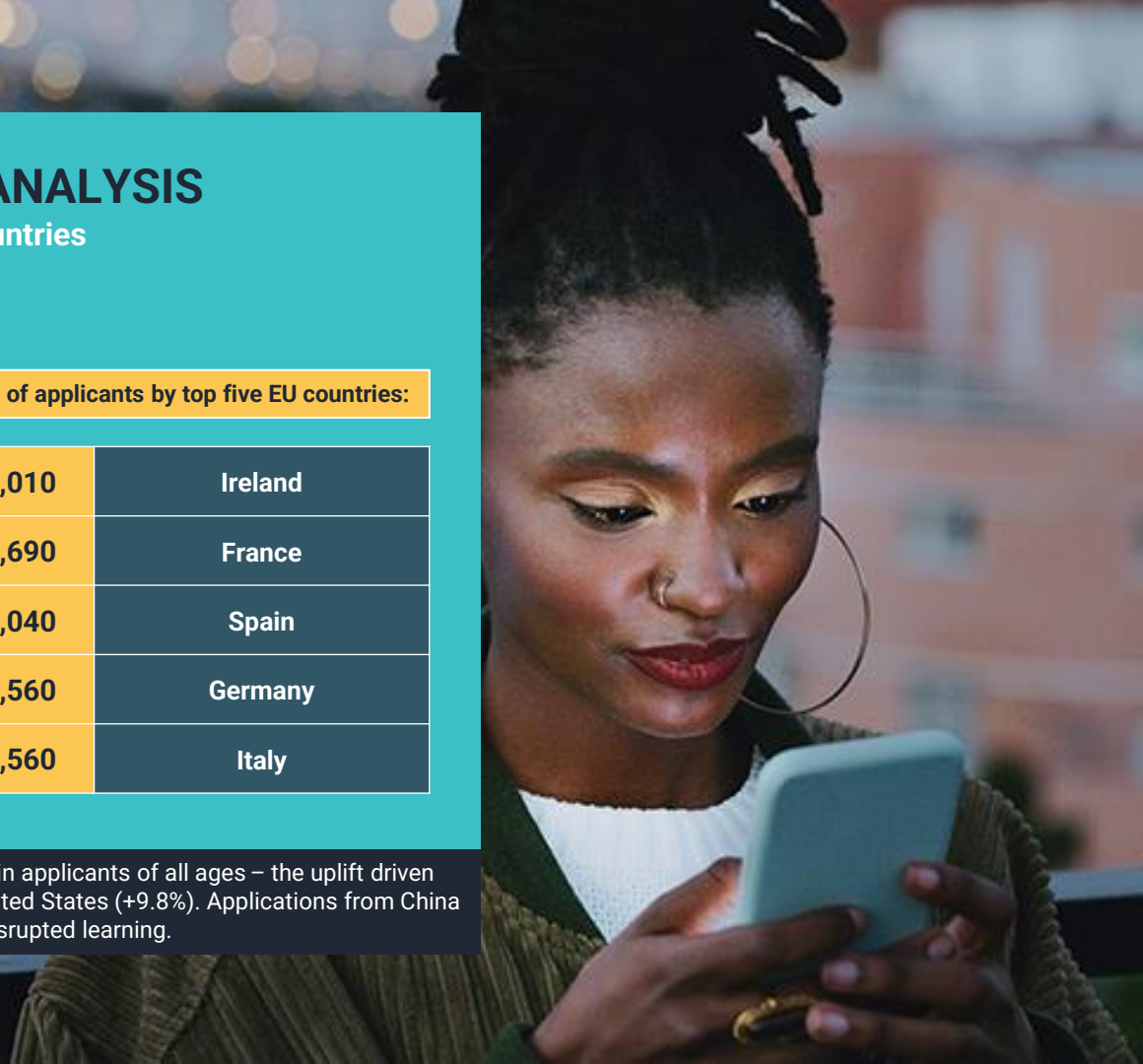
### No. of applicants by top five non-EU countries:

27,710	China
9,130	India
5,800	United States of America
5,680	Hong Kong
3,610	Singapore

### No. of applicants by top five EU countries:

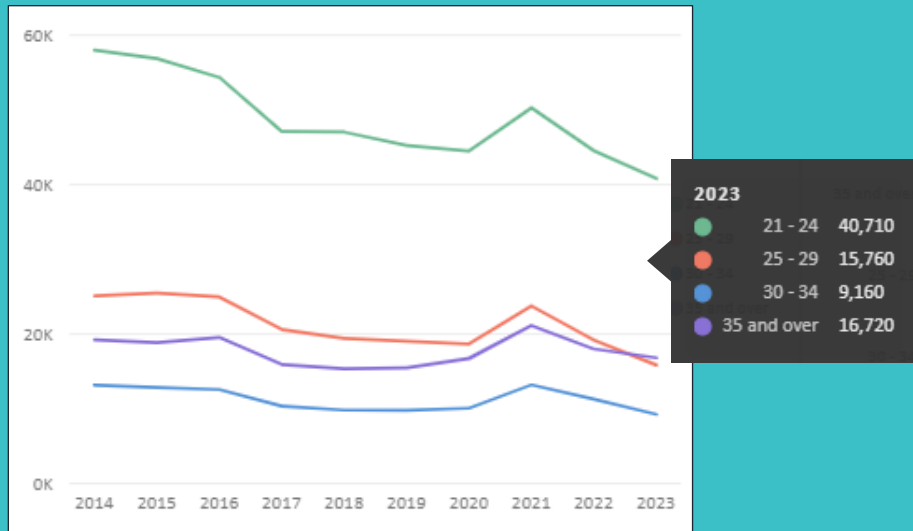
5,010	Ireland
2,690	France
2,040	Spain
1,560	Germany
1,560	Italy

International demand continues to grow, with a +3.1% increase in applicants of all ages – the uplift driven by countries such as Nigeria (+23.1%), India (+5.4%) and the United States (+9.8%). Applications from China are down (-4.2%), most likely due to Covid-19 restrictions and disrupted learning.



# 2023 JANUARY DEADLINE ANALYSIS

## Number of applicants by age group (mature applicants)



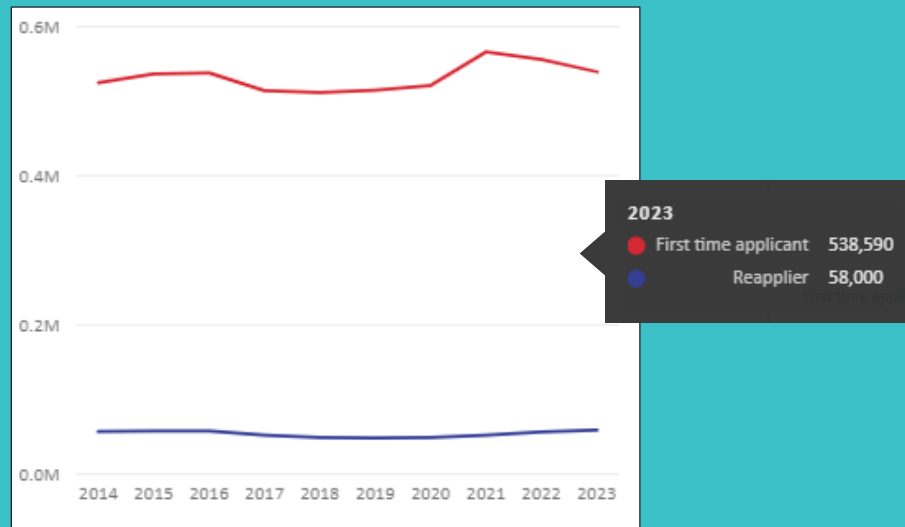
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total	115,050	113,630	111,040	93,670	91,200	89,160	89,580	107,970	92,600	82,350

The number of UK mature applicants has fallen compared to last year (-14%), mostly due to a decrease in nursing course demand.



## 2023 JANUARY DEADLINE ANALYSIS

### Number of applicants by reapplication status



Total reapplications (all ages, all domiciles) has increased (+3.9%), with the majority of these submitted by 19-year-olds. The total number of 19-year-old applicants has also risen compared to last year (+0.8%), showing strong commitment among this age group to pursue a place at university or college.



# UCAS Chief Executive, Clare Marchant said:

“Demand from UK 18-year-olds is the second highest on record, a testament to the continuing attraction of undergraduate study. However, this is another complex cycle with a myriad of global and national factors impacting demand, all within the context of an increasing demographic and high employment rates.

Demand for undergraduate courses during Covid-19 was unprecedented and so a slight recalibration in the number of applicants might be expected, particularly for courses related to nursing and healthcare which saw exceptional growth as students were inspired by the pandemic to pursue these professions.

“UCAS polling on student attitudes also shows cost of living factors are making applicants re-evaluate their choice of subject based on value and future career prospects. We are seeing increased interest in subjects which students perceive to have good career prospects, such as computing and law.

“Over the past five years, the number of UK 18-year-old applicants has risen by 17.4% and we anticipate this upward trajectory will continue over the remainder of the decade, based on a rising 18-year-old population and the continued global attraction of UK higher education.”

# Explore the January deadline data further

Explore the data further in our **interactive dashboard** which provides core numbers for the 2023 January Equal Consideration application deadline and graphical illustrations of key trends.

**Watch our webinar** from 9 February where we discussed the data and projections for Clearing.

UCAS



# Connecting with applicants after the deadline

Opportunities to reach and engage with late, Extra and unplaced applicants

## Late applications / mind changers were **22%** of the overall market in 2022

- **73k** applications received January - June
- **78k** applicants in Clearing
- **20k** used Decline My Place to find a new opportunity

Around **171k** applicants were actively researching and applying post equal consideration date



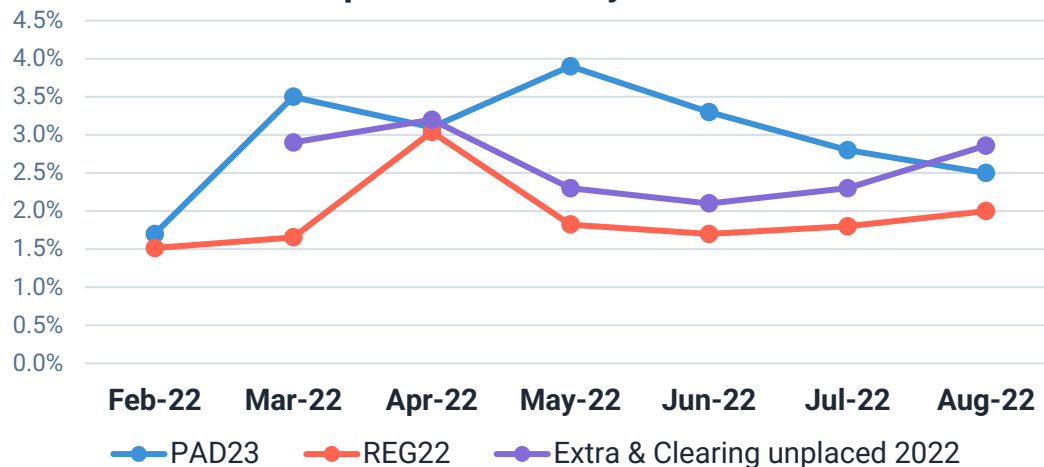
# Different ways to reach applicants

There are three types of students applying after the January deadline:

- **Pre-applicants** – who've registered but not yet applied
- **Registrants** – who've started an application but not yet sent it to UCAS
- **Unplaced** – who've applied but are not holding an offer and are either eligible for Extra or Clearing

Campaigns post-January receive strong engagement right through to Clearing – April is optimum for registrants and unplaced pre-Clearing.

## Unique click rates by audience



Email click through rates

# High performing registrant subject lines and creative

- %%firstname%%, Find Your Uni, Apply Today!
- 9 days to go – apply for your law degree today
- %%FIRSTNAME%%, Jump in to Nursing in 2022
- Study an engineering degree with a difference at [University/College]
- Make it happen with a Management Degree from [University/College]
- Secure your Mathematics place for September 2022, %%firstname%%!



Short introductory paragraph about the course/subject being promoted (three lines of text).

## OUR COURSES

> Course 1

> Course 2

> Course 3

> Course 4

## ENTRY REQUIREMENT INFO

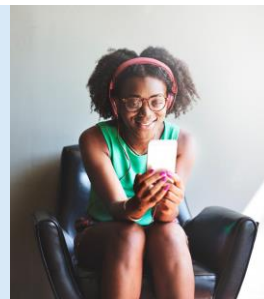
FIND OUT MORE

# High performing Extra 2022 subject lines and creative

- Study Biomedical Sciences at [University / College]
- Considering studying a law degree this September? There's still time to apply
- It's not too late to study business in 2022.
- Apply with UCAS Extra and study business in 2022
- Clearing applications are now open at [University/College], discover your perfect course
- Bioveterinary Sciences places available at [University]

Logo

**FIND *YOUR*  
PERFECT  
COURSE**  
with UCAS Extra



Do you still want to start your university experience in 2022? Then we have good news for you – you can now apply to study at [University] through UCAS Extra.

Prominent call to action button included high up the email



Find out  
more

We offer a range of courses across key subject areas:

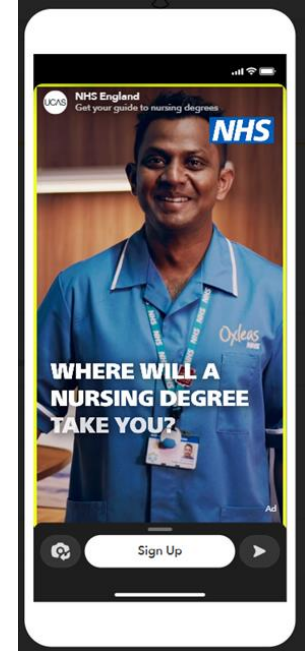
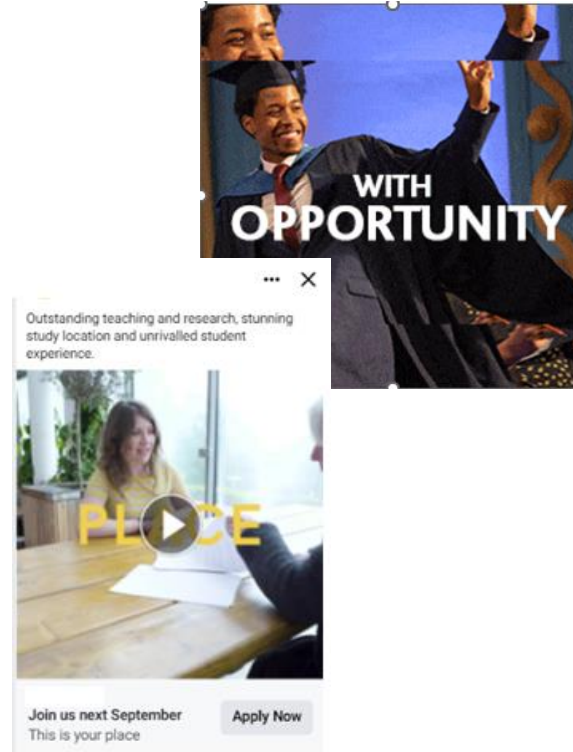
Individual linked subject/courses



- [Subject 1](#)
- [Subject 2](#)
- [Subject 3](#)
- [Subject 4](#)
- [Subject 5](#)
- [Subject 6](#)
- [Subject 7](#)
- [Subject 8](#)
- [Subject 9](#)
- [Subject 10](#)
- [Subject 11](#)
- [Subject 12](#)

# High performing social creatives

- Use a consistent tone of voice, look and feel throughout
- Keep a fast pace
- Consider the importance of sound/music and subtitles
- Tell a story
- Use native content
- Include first-hand/user-generated content
- Combine image/video and text
- Have a strong, single call to action



# What are students doing?

Across [ucas.com](https://ucas.com)



## WHO'S ENGAGING WITH UCAS?

Top ten searched for subjects on UCAS Search in January 2023

Position for  
January 2023

=	1	Psychology	▲ <sup>1</sup>	6	Computer science
▲ <sup>1</sup>	2	Law	▼ <sub>1</sub>	7	Physiotherapy
▼ <sub>1</sub>	3	Nursing	▲ <sup>6</sup>	8	Pharmacy
=	4	Medicine	▲ <sup>4</sup>	9	Economics
=	5	Business	▲ <sup>1</sup>	10	Architecture

Change in position  
since January 2022



# WHO'S ENGAGING WITH UCAS?

Top ten visited Subject Guides on [ucas.com](https://ucas.com) in January 2023

Position for  
January 2023

=	1	Psychology	▲ <sup>2</sup>	6	Nursing
▲ <sup>2</sup>	2	Medicine and allied subjects	▼ <sub>2</sub>	7	Computer science
=	3	Law	▲ <sup>5</sup>	8	Sport
▼ <sub>2</sub>	4	Business, management and administrative studies	▼ <sub>3</sub>	9	Architecture, building and planning
▲ <sup>9</sup>	5	Criminology	▲ <sup>6</sup>	10	Midwifery

Change in position  
since January 2022



# WHO'S ENGAGING WITH UCAS?

Top ten visited City Guides on [ucas.com](#) in January 2023



Position for  
January 2023

=	1	London
=	2	Manchester
▲ <sup>10</sup>	3	Cardiff
▲ <sup>3</sup>	4	Leeds
=	5	Edinburgh
▲ <sup>2</sup>	6	Liverpool
▼ <sup>4</sup>	7	Bristol
▲ <sup>3</sup>	8	Nottingham
▼ <sup>5</sup>	9	Birmingham
=	10	Glasgow

POSTCODE DISTRICT MAP

Change in position  
since January 2022





# WHO'S ENGAGING WITH UCAS?

Top five undergraduate pages on [ucas.com](https://ucas.com) in January 2023

Position for  
January 2023

=	1	Applying to university
=	2	How to write a UCAS Undergraduate personal statement
▲ <sup>1</sup>	3	Filling in your UCAS Undergraduate application
▼ <sub>1</sub>	4	Tracking your UCAS application
=	5	When to apply

Change in position  
since January 2022



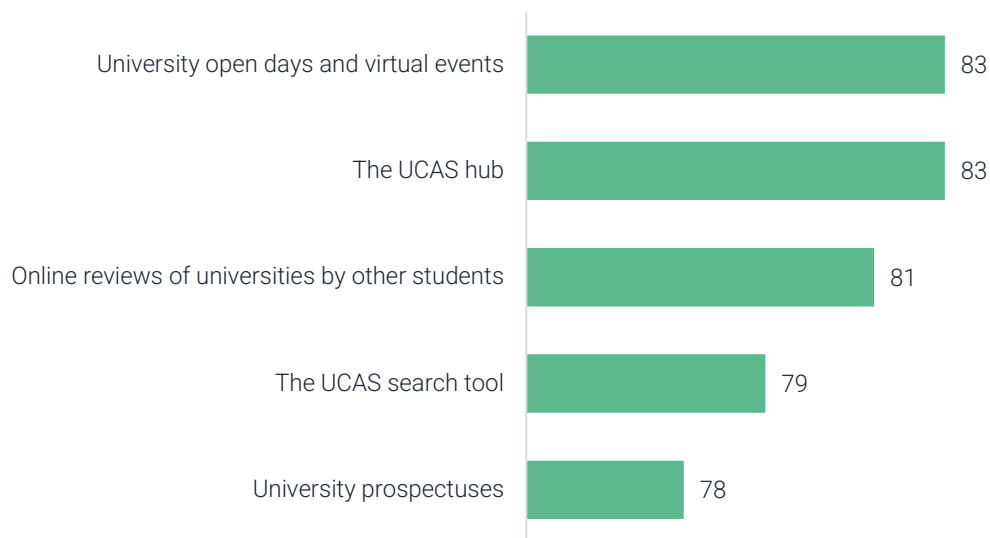
# Preparing for 2024

The latest breakdown of PAD volumes by subject and how we expect the audience to grow



# More students than ever are registering with UCAS, as the go-to source

Top 5 most important resources when deciding where to apply



- ucas.com page views reached **129m** in 2022
- Time spent on the hub increased by **27%**

*Q: When deciding which universities and colleges to apply to, how important were the following resources? % Extremely Important/Important*

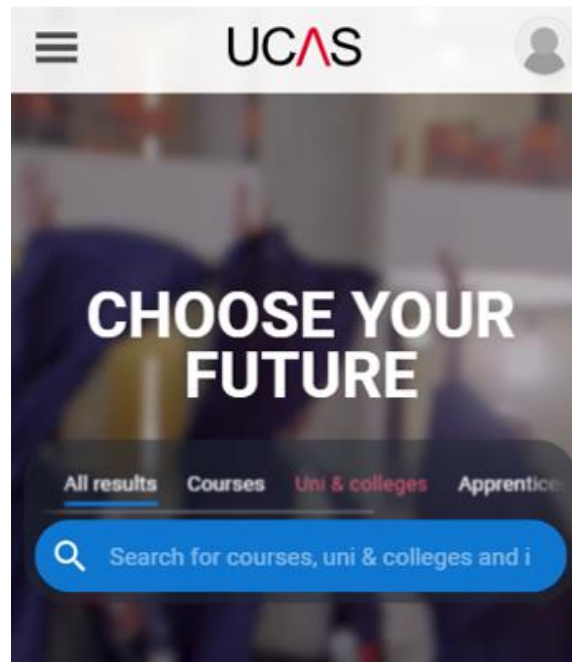
*Source: New applicant survey 2022. 18,900 responses*

# The Hub is now more visited than the homepage

Over December and January:

- 5.6m page views vs 5.3m on the homepage (+6.3%)
- Av 5 widget interactions per visit
- 2.67% bounce rate

Data is more personalised, with more students favouriting courses, universities, and subjects.



## Pre-applicants are ready to hear from you



# 50,765



PAD24 students have opted-in  
to be contacted by providers

**95,115** total PAD24 students

Over **15,000** PAD25 already registered

\*Subjects listed under 'Arts' include Graphic Design, Filmmaking, Fashion, Animation, Drama and more.

### Top 5 subject areas students are interested in

<b>Arts*</b>	12,900
<b>Medicine</b>	9,733
<b>Sociology</b>	7,807
<b>Business</b>	6,176
<b>English</b>	5,985

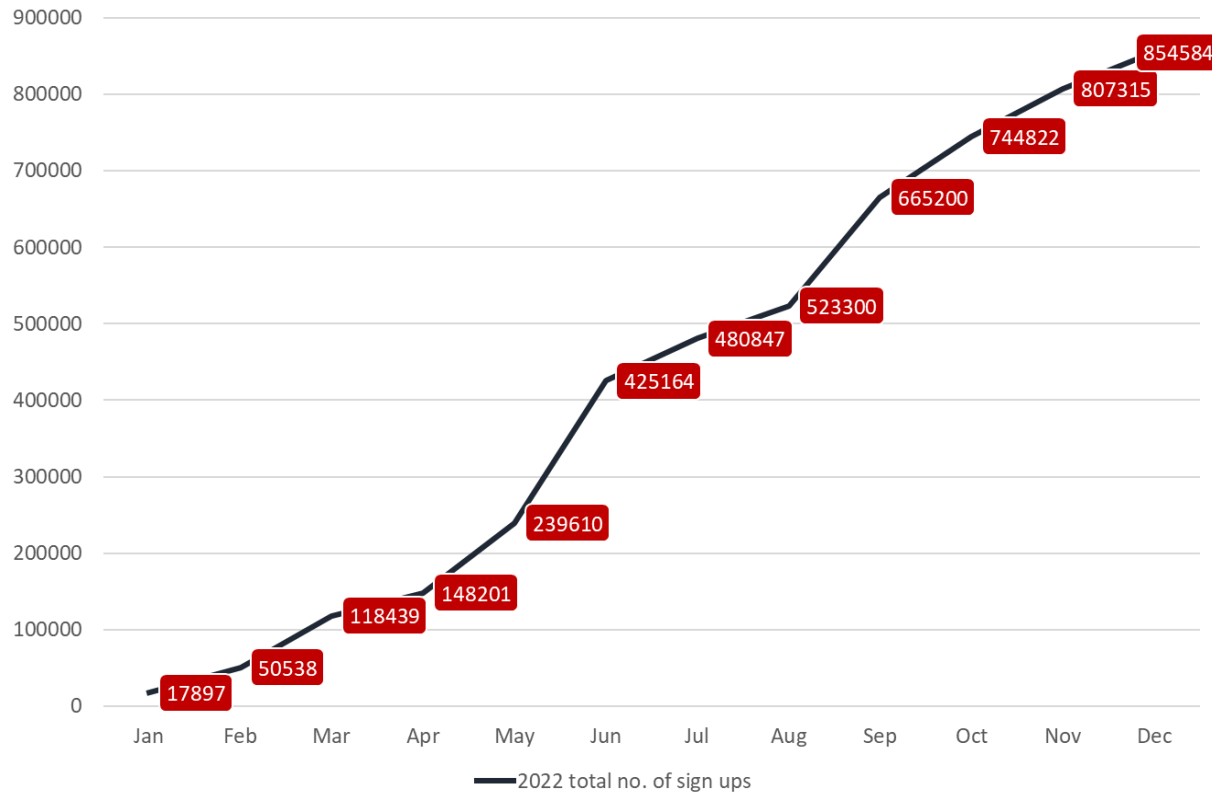
## Subjects that PAD24 students are interested in...

<b>Arts*</b>	12,900	<b>Nursing</b>	3,653	<b>Language</b>	1,353
<b>Medicine</b>	9,733	Finance	2,809	<b>Veterinary</b>	1,086
<b>Sociology</b>	7,807	<b>Publishing</b>	2,607	<b>Agriculture</b>	632
<b>Business</b>	6,176	History	2,465	<b>Drama</b>	252
English	5,985	English Lit	2,353	<b>Dance</b>	240
<b>Computer Science</b>	5,918	<b>Architecture</b>	2,315	<b>Criminology</b>	171
Law	5,084	<b>Sport science</b>	2,188		
<b>Biology</b>	5,069	<b>Music</b>	1,862		
Physics	4,102	<b>Education</b>	1,857		
Psychology	4,417	<b>Maths</b>	1,623		

\*Subjects listed under 'Arts' include Graphic Design, Filmmaking, Fashion, Animation, Drama and more.

# PAD23 sign ups in 2022

UCAS



May – July is an optimum time for brand awareness and building connections



# Create your pre-Clearing and 2024 awareness packages

Reach the right students for your institution at the right time, with a multichannel approach to suit your needs and budget

## Choose your strategy

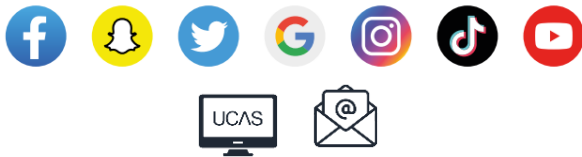
- Extra / late applications
- Pre-Clearing awareness
- Subject-specific targeting
- 2024 brand awareness

## Choose your channels

- ucas.com display / keywords
- Paid media
- Email
- Direct mail

## Choose your budget

We'll create the optimum package to be delivered at exactly the right moment

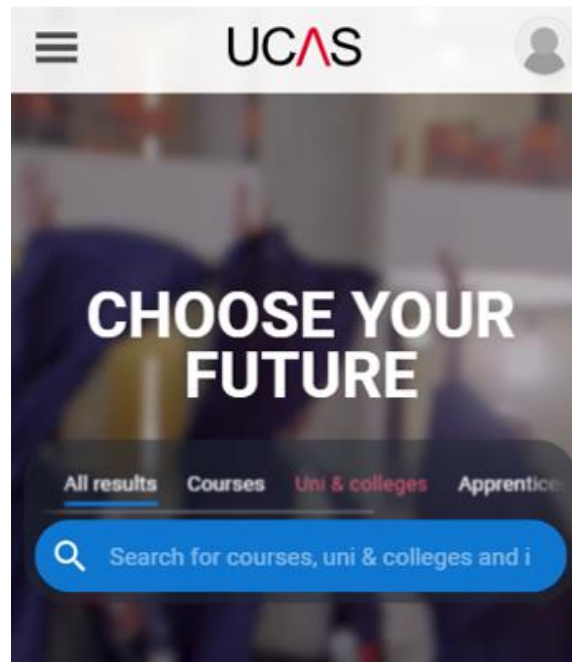


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**We are delighted to sponsor:**

# **Not Another HE Conference: 23 and 24 March 2023**

**A chance to get together with HE marketers, share insights and learn from others, join us for our two sessions:**

**10 Strategies to Succeed in 2026 - David Penney, Director of Marketing, UCAS**

What does the changing competitive landscape mean for student choice, your institution, and your skills as an education marketer? David Penney will talk you through UCAS' predictions for 2026 and the top 10 things you need to do as HE marketers to know (and prepare for) to be successful.

**Co-creation Live! That First Connection - The Inside View - UCAS and Youthsight**

Our panel of students, hosted by UCAS and Youthsight, will tell you what attracts them to you, and what turns them away at an exhibition. You'll discover what they expected, what caught their eye on the day, and what they want from you now. Get to ask your burning questions to attract the next generation and build connections.

Tickets are on sale at <https://conference.educationcubed.com/>

# Resources to help with recruitment

## Everything we offer in one place

Your guide to all UCAS' services in one place, to help you recruit and manage the application journey. A snapshot of each service with links to find out more.

[www.ucas.com/education-services](https://www.ucas.com/education-services)

## Navigate the 2024 cycle

From planning your course portfolio, understanding the student and competitor market, connecting with the right applicants and preparing for Confirmation and Clearing, we highlight which services can help you throughout the two-year recruitment cycle, as well as key dates to be aware of at the right times.

[www.ucas.com/providercycle](https://www.ucas.com/providercycle)

# 3 Big Lessons from January 2023

UCAS

*(If you only read one slide, make it this one.)*

## It's a blip, not a dip.

Explosive growth will resume shortly.

Applications were down this year, but context is more important than the numbers here.

COVID created historically unusual growth in nursing and education. And as we return to business as usual, and away from the anomalous pandemic influence, we're still on course for record-breaking figures. Our predictions remain, our polling continues to support them, and we're standing firm in our forecast of seeing the first one-million-application cycle, before 2030.

So **don't take your foot off the gas**, not even a little bit. Your share of **huge market growth is still on the table**.

## The January deadline isn't everything.

(It's not even 80% of everything.)

More than 170,000 applicants were researching and applying after the January deadline. And last year, late applications and mind changers made up almost 25% of the entire market. Translated into average undergrad fees, that's over £4bn.

As students learn to use Clearing their way – by declining places and 'trading up' – and competition increases alongside the growth of UK 18-year-olds, the post-deadline months are going to be more important than ever.

You need your **timings, strategy, and resource** to compete on three fronts after Jan: **pre-applicants, registrants**, and the **unplaced**.

## 2024 applicants are researching differently.

More roads now lead to UCAS.

Last year, The Hub on [ucas.com](https://ucas.com) tied with university open days as the most important research tool for students. Usage increased by 27%, and UCAS Search was hot on its heels.

And, compared to this time last year, there are more pre-applicants signing up on our website. By December 2022, that number was more than 850,000.

Get your **pre-Clearing** and **awareness** campaigns ready to start firing **by May**, which is when **connections with pre-applicants are best made**.

01.

02.

03.

## **Change is opportunity, if you can keep up with the Joneses.**

As several markets grow, and student groups develop new behaviours, it's the providers quickest to pivot that will come out on top.

Clearing usage is changing, more applications are coming later, pre-applicants are researching earlier, and all the while – each student is navigating the end of COVID, and the start of a university experience influenced by the increased cost-of-living.

Being part of the conversation and providing answers has always been key to winning brand loyalty and, with so many changes and so many questions, there's never been more conversations to join.

**We'll see you again next month.**

# Get in touch

For further information and insights contact your UCAS Customer Manager or email us at [educationservices@ucas.ac.uk](mailto:educationservices@ucas.ac.uk).