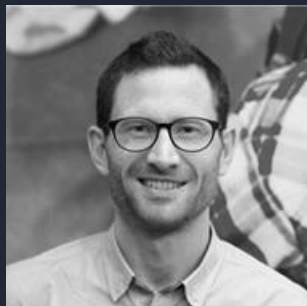


The 2020 cycle

What did applicants actually do, and why?



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We will explore:



Top-level
highlights from
the 2020 cycle



What
happened in
Clearing



What
happened to
those wanting
to defer



What we can
learn for the
2021 cycle

The 2020 cycle was
incredibly turbulent for
students, so what were
the highlights?

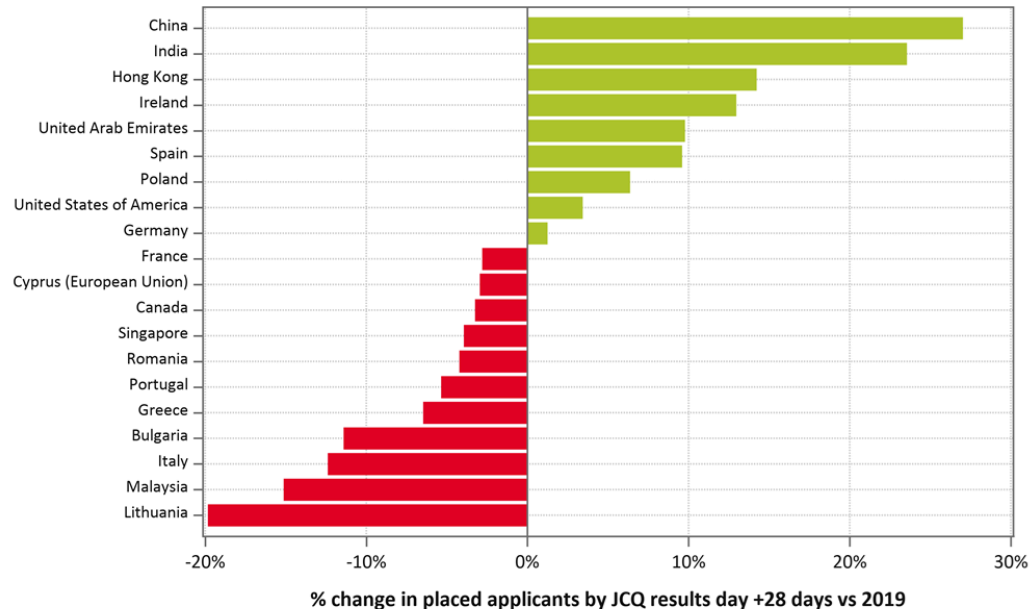
Over 500K students secured a place

Applicant domicile	2019 cycle	2020 cycle	Total change	Proportional change
UK	424,560	441,720	+17,160	+4%
EU	30,350	29,630	-420	-2%
Outside EU	40,720	44,300	+3,580	+9%
Total	495,360	515,650	+20,290	+4%

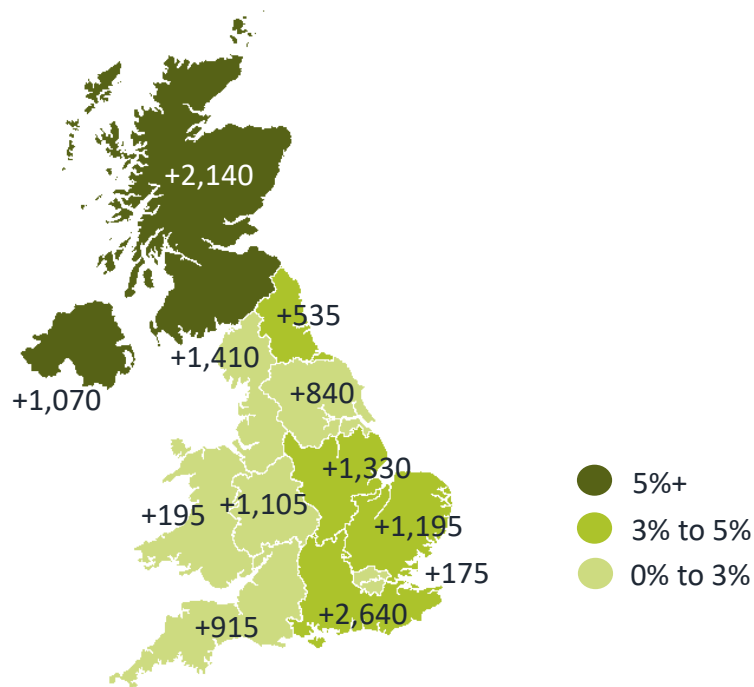
Growth continued from top countries in Asia, but the EU decreased

- Historically large markets such as China, India, and Hong Kong continued to grow this year.
- The majority of the large recruiting countries seeing declines are in the EU.
- However, this is still an evolving picture.

Top 20 recruiting non-UK countries in 2019 - change this cycle

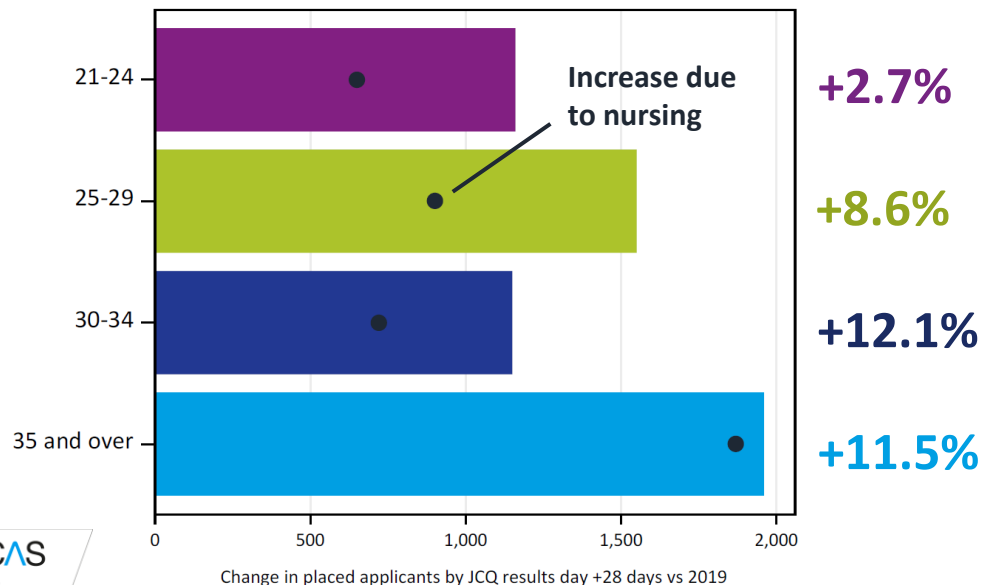


All regions saw an increase in placed applicants



- Notable percentage increases were seen in **Scotland** and **NI**, with very large overall increases in the **South East of England**
- Encouraging growth seen in the **South West** and **North East**

An increase in mature students was driven by the growing demand for nursing



- The largest growth in UK acceptances was amongst older applicants, with groups **over 21** increasing, while 19 year olds declined by 5%.
- For students aged 35+, this growth is driven by an increase in **nursing** acceptances.

Four themes emerged when we surveyed our late applicants about why they decided to join HE

- I couldn't do the other thing I wanted to do
- I had time to think and consider my life options
- I am worried about job prospects
- I want to work on the front line

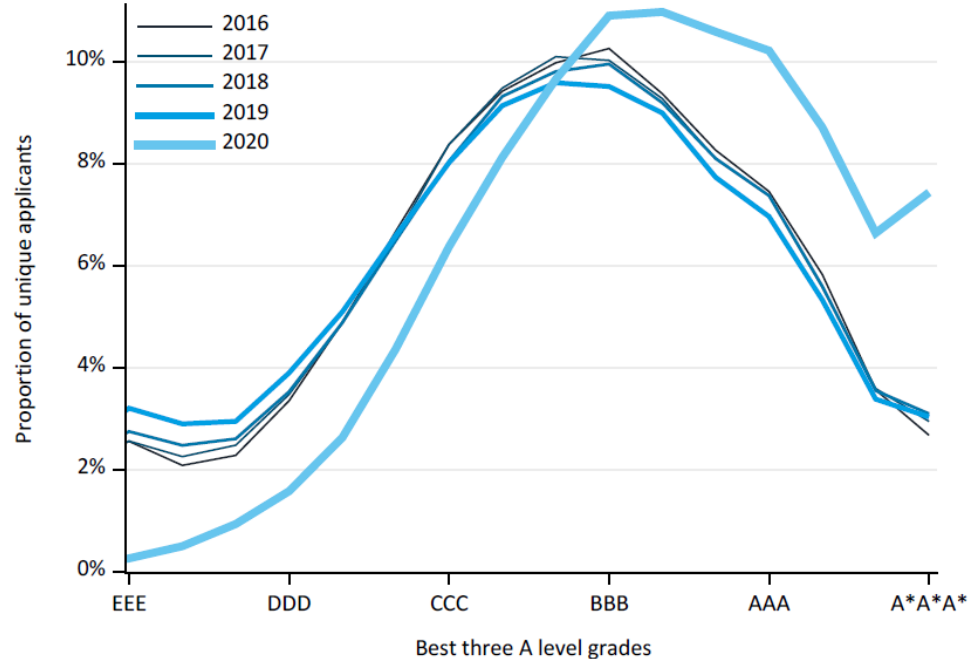
“The need for social workers to keep society going and protecting those in need within our society.”

89%

of students who had their grades revised went to be placed at their firm or insurance university (or a comparable offer)

A level attainment was significantly higher in 2020

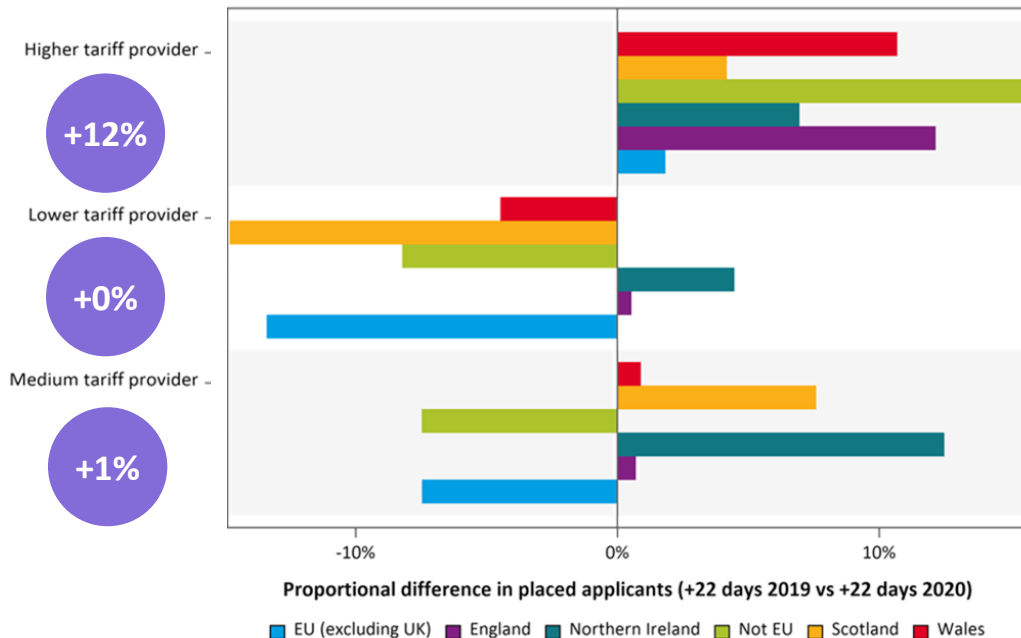
- Following the government U-turn on grades, the distribution of achieved A level grades was **not standardised** in line with previous cycles.
- The result is a sharp increase in the average A level grade profile from **BCC-BBC** to **BBB-ABB** (+1.3 grades on average).



High tariff universities
saw an overall 12%
growth – much of this
very late in the cycle

Higher tariff HEPs saw the largest increases, especially from international domiciles

- Higher tariff providers saw a **12% increase** in placed applicant numbers (+18,480), while trends for other HEPs are more **stable** overall.
- In particular, these providers saw the largest growths from both **EU** and **non-EU** applicant domiciles.

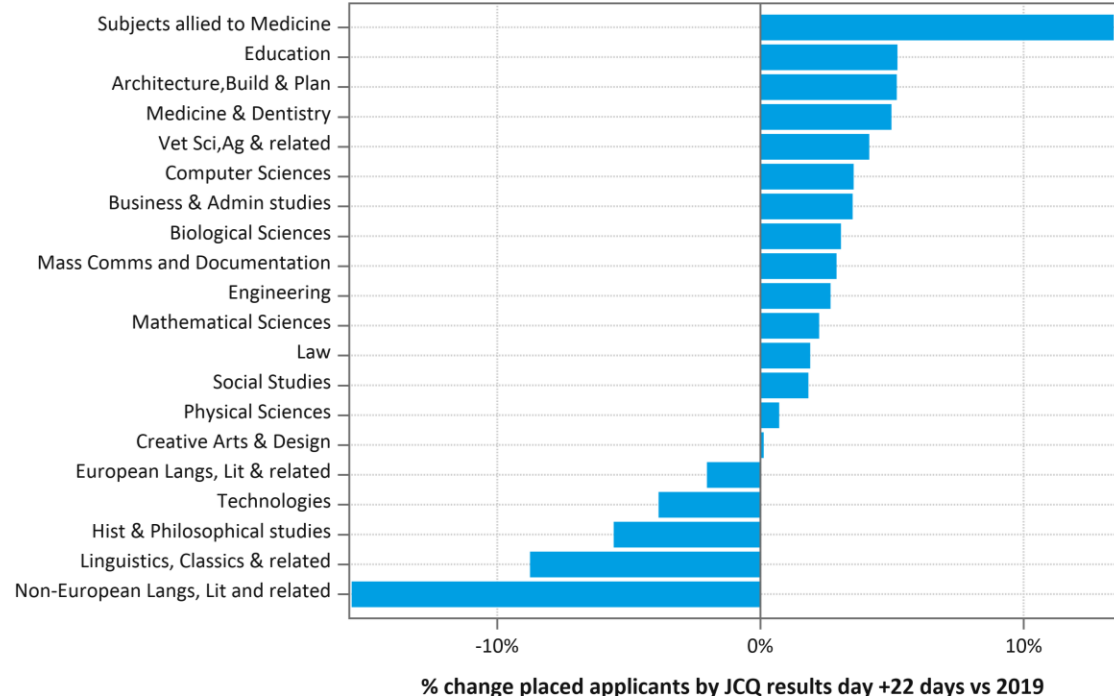


A record 22.5% of all young people from POLAR quintile 1 (the most disadvantaged areas) have been placed on an undergraduate course

The largest percentage increase to a subject area was to courses allied to Medicine

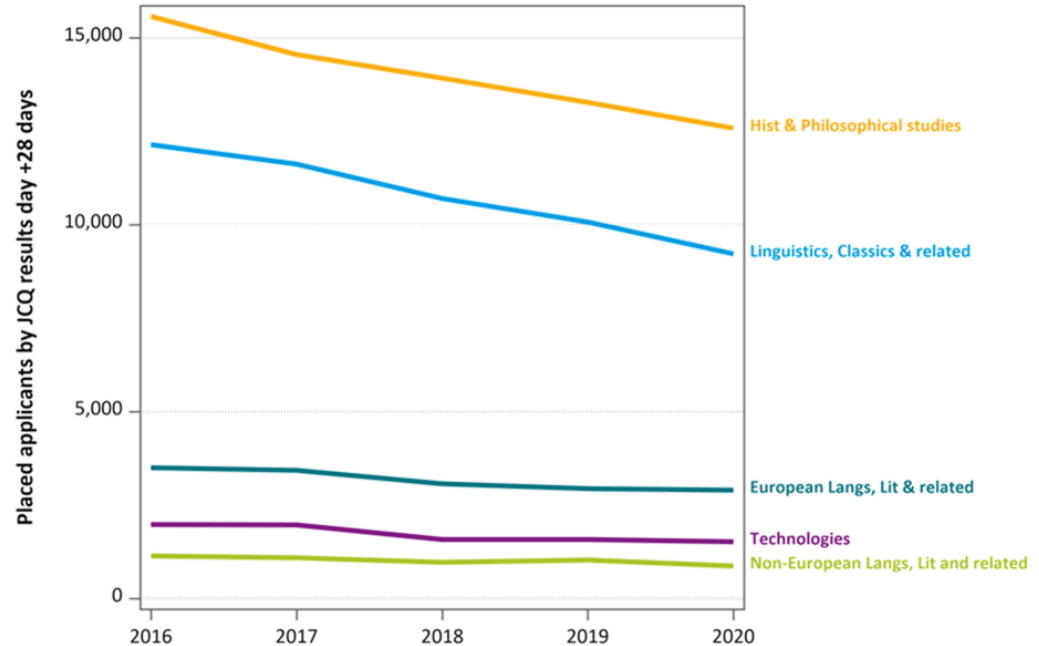
Acceptances increased across most subject areas

- Subjects **allied to Medicine** saw the largest growth, with a 13% increase in placed applicants (driven by nursing).
- History and language courses saw the largest decrease in demand.



Subject declines were continuations of existing trends

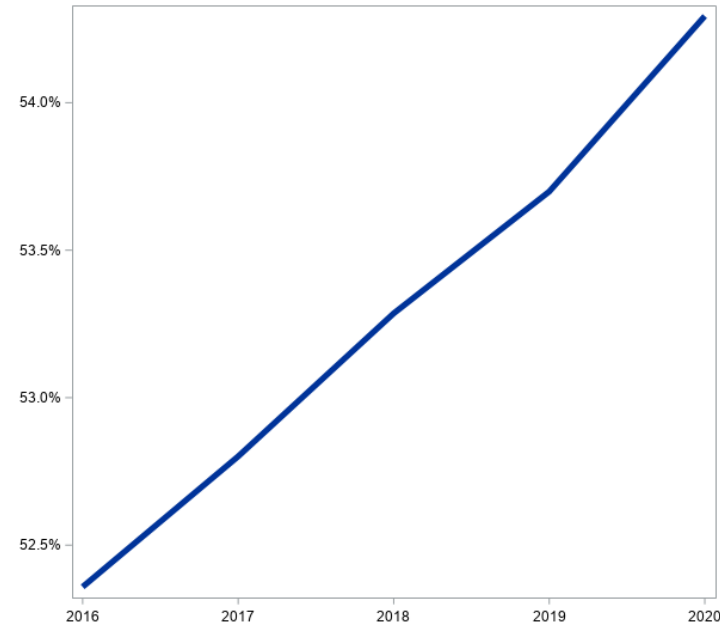
- All declining subjects had similarly declined in recent cycles.
- The largest decreases came in **Linguistics, Classics, and Related** (-850, -8.4%) and **History and Philosophical Studies** (-690, -5.2%).



**Applicants from the north
of the UK were more
likely to remain in their
local region**

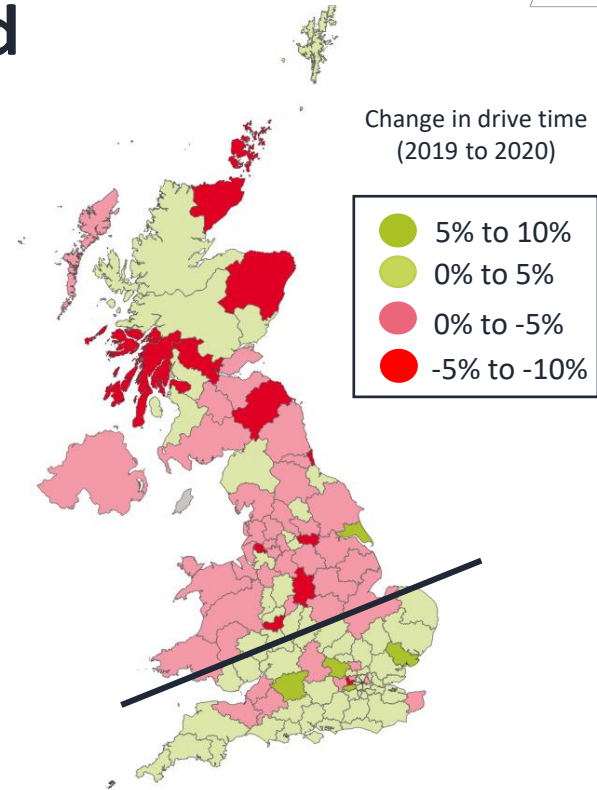
More UK domiciled applicants are choosing to stay within their home region

- Nearly half of 2020's placed applicants remained within their home region to study – a continuation of past trends.
- However, the rate of increase in students choosing to study closer to home has slightly accelerated.
- This is true of all age groups, so not solely driven by the increase in mature applicants.



Applicants in the south of England are more willing to travel

- Although overall sector drive time has increased, it is primarily students from the South of England who were more mobile in 2020.
- This is not a recurring trend, as drive time changes have been fairly sporadic over the last five cycles.
- One to watch over the course of 2021.



So, how were applicants feeling during the 'corona cycle' and how did sentiment relate to reality?

At the height of
nervousness

25%

said they were
thinking of deferring



YouthSight

In contrast to sentiment, deferrals did not significantly increase compared to 2019

5.7% deferral rate

The deferral rate was only 0.3 percentage points higher than in 2019, despite sector and media expectations.

However, Non-EU deferrals were markedly up

6.8% deferred their place in 2020, up from 3.8% in the previous cycle.

What was the real story behind Clearing?

What were they thinking about Clearing?

- **46%** said they were considering changing their university choices
- **35%** of students said they were planning on using Clearing
- **22%** of students said they would use Clearing to 'trade up'

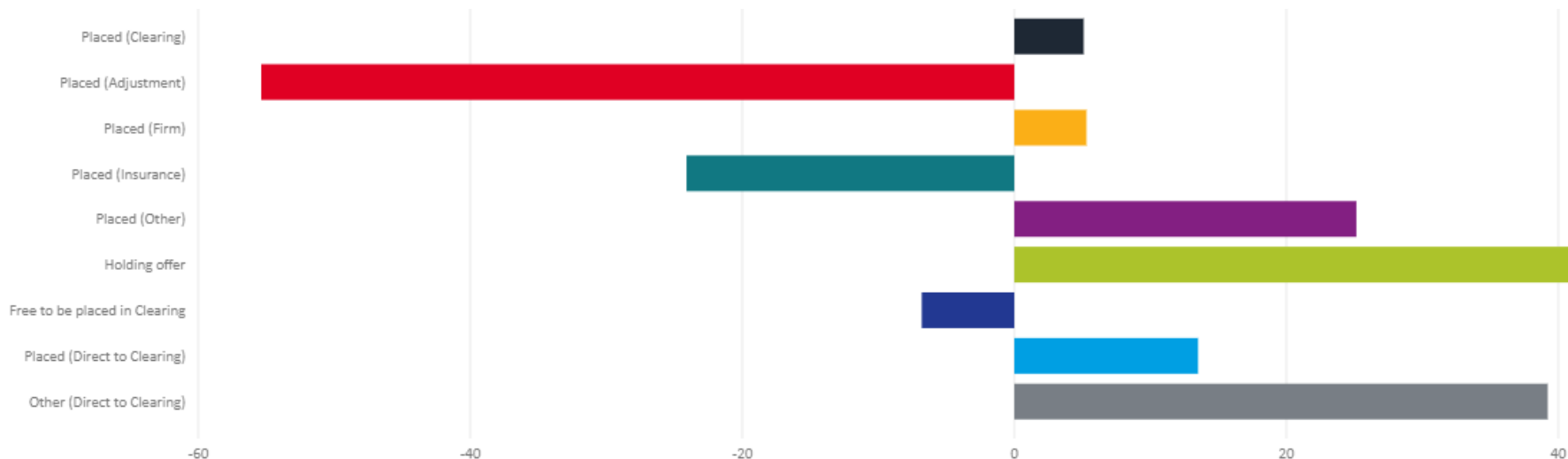
**Clearing acceptances
were up**

7%

**year-on-year, driven by
late applicants applying
directly to Clearing**

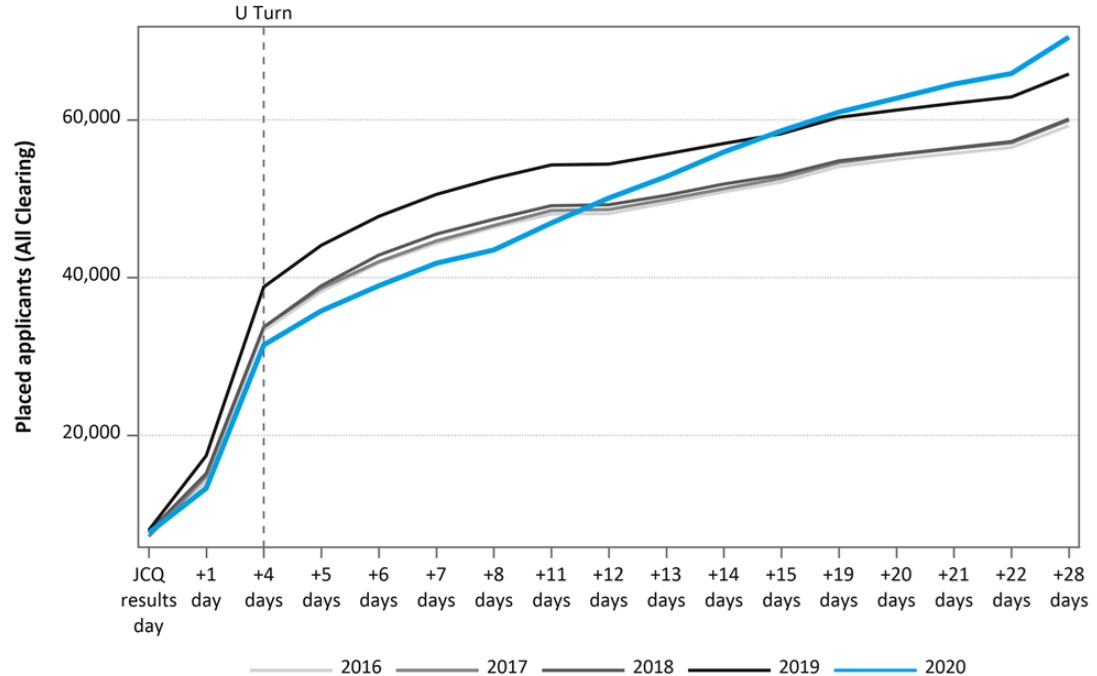


How did the different routes to Clearing play out?



Clearing activity was much later than usual

Numbers were significantly down in the first week (-17.3%) but increased at a much higher rate from then on.



- 21,000 students registered an interest with at least one course through **Clearing Plus**
- 40% of these who were contacted by a university were ultimately placed at a provider they registered an interest in



Our highlights

UCAS

Over 500K
students secured
a place at
university

The deferral rate
was under 6%,
despite sentiment
being unsettled

21,000 registered
an interest in a
course through
Clearing Plus

Late applicant
demand was
strong. With
direct to clearing
acceptances up
by 14%

89% of those who
had their grades
revised went on
to be placed at
either
firm/insurance or
at a comparable
university

40.5% of all UK 18
year olds applied
to HE

We have seen the
highest ever
number of Polar 1
and 2 applicants
placed at a high
tariff university

UCAS
Media

What can we learn from the 2020 cohort as we're planning for 2021?

**70% of female applicants rated
'Fit in with other students' as
either extremely important or
important in their decision
making.**

**This was the same for 62% of
male applicants.**

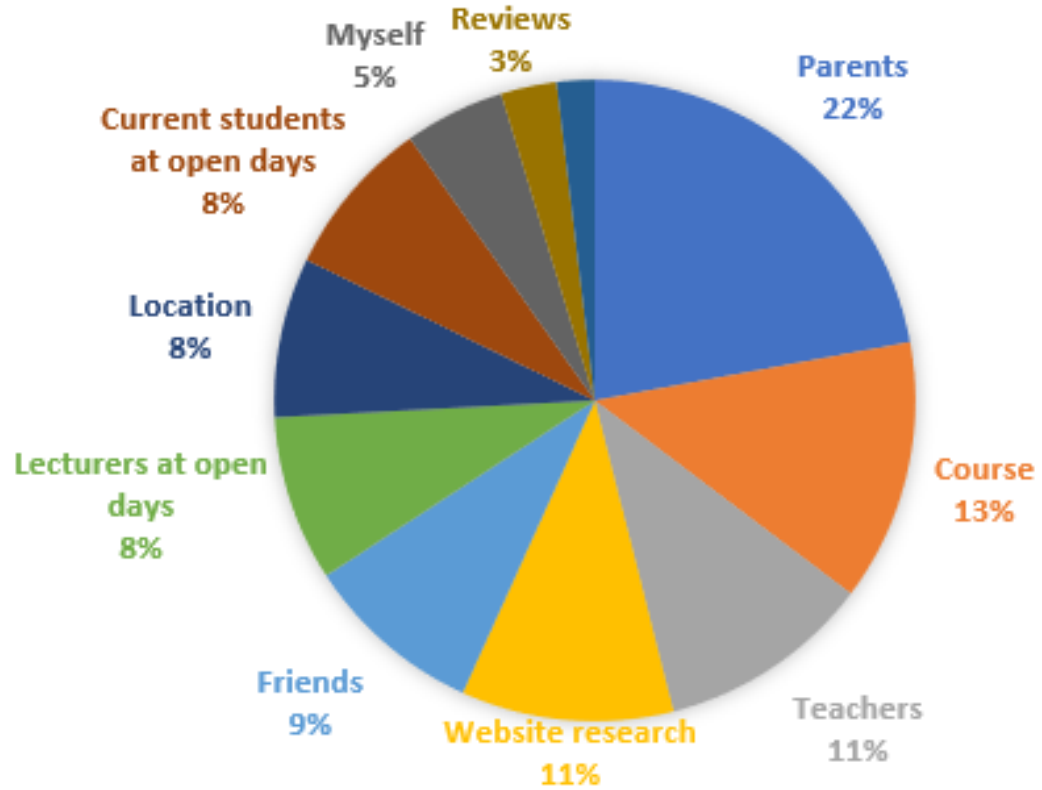


The word **'feel'** was the most common word cited when we analysed the thousands of free text responses we got when we asked why someone chose the university they did in 2020.

In 2019, that word was **'home'**

Parents were cited as the most influential when it comes to decision making

We combined the answers given along with the free text – this underplays the importance of course and location



When asked about the influence of university lockdowns in the media,

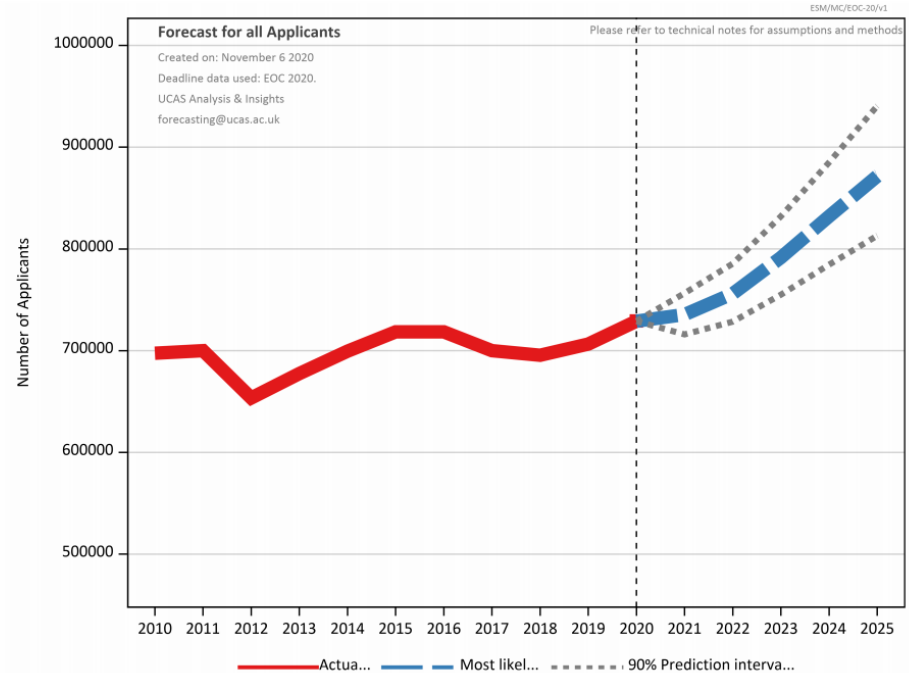
40%

said they were considering either living at home or staying locally – but teaching quality was most important for 51%

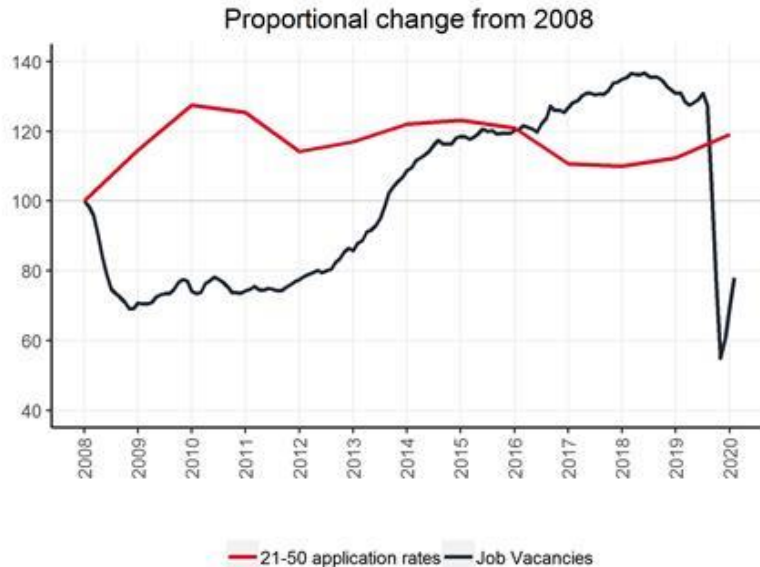


What could demand look like for 2021

- The last few cycles have seen continued increases in the number who are applying to university – in the 2020 cycle we had the highest participation rate from 18 year olds
- The number of 18 year olds will also rise as we come out of the demographic dip
- The data therefore suggests that the number of applicants will continue to rise



What could mature demand look like for 2021



- The data historically suggests there is an inverse relationship with the amount of job vacancies in the UK and the number of mature applicants going into HE – the lower the number of jobs, the higher the number applying to HE
- So, for 2021 we predict that the number of mature applicants will continue to grow

So, how can we plan and help the 2021 cohort?

- Only 40% have decided on their final UCAS choices according to our latest research, so they are still in **decision-making mode**
- For applicants it's all about the **'feel'** of a university. We recommend that you attempt to bridge the virtual/human divide as much as you can by utilising your reviews and students ambassadors, curating your online content, and reaching out through **direct mail** and any channel that touches **parents** as well as applicants
- Reassure applicants that they are making a good long-term choice for their future despite a lack of real life experiences
- Expect Clearing to be big again this year!

Q&A

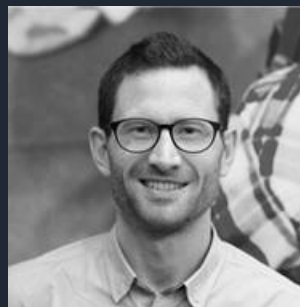
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