

Insight Newsletter

October 2022

UCAS



Welcome to the UCAS Insight Newsletter – October 2022

As we head into the second half of the first term, it's like we've never even been away. Open days are opening their doors again, tutors are getting a handle on their new classes, and marketing departments are engaging with 23/24's applicants.

And by now, **undergraduates** are once again a familiar sight in lecture halls and SUs. They've survived Freshers' Week, and they're well into term number one. For most undergraduate **applicants**, it's a little quieter, although the deadlines for medical courses have already passed – as have those for Oxford and Cambridge.

Here at UCAS HQ, we've been poring over the findings from the Day 28 dataset – and what they mean for providers. Compiled a month after results day each cycle, it's one of the best indicators of student sentiment, achievement, and expectations for the coming year. We also have research to share with you, on the decision making of 23/24 pre-applicants.

Let's get started.

The records broken in September and what they mean

Being a month out from JCQ Results Day always means a better picture of the year to come.

And more often than not, it comes with a set of new discoveries and records broken.

22/23 is no different:



500,000+ places awarded – the highest non-COVID year – and more to UK 18 year olds than ever.

More than half a million students earned their places this year. As the number of applications increases (which we expect it to with our journey to a million in 2026), the competition will grow more fierce. It's a trend likely to continue all the way to 2030.

We can already see its impact: selective providers getting more selective, and students use Clearing to upgrade their offers.



Chinese students double since 2018, rising 23% on last year, and overtaking Northern Ireland.

This year, more Chinese students accepted places in the UK than France, Ireland, India, Hong Kong, USA, and Malaysia combined. But this rapid ascent could be getting ready to slow down, as the global marketplace gets more competitive and the UK suffers from its market share declining over the past decade. The familiar and vital growth of Asian applications may become a little less familiar soon...



And get ready to change your prospectus strategy.

When COVID dialled up the digital experience, lots of pre-COVID problems were solved. But when we polled students about their prospectus tastes, we saw that they want choice – digital and print. And when they want them is later than you might think, as they wanted subject-specific literature from exhibitions – not the complete works. Is it time for a U-turn?

What are students doing?

Across ucas.com

WHO'S ENGAGING WITH UCAS?

Top ten searched for subjects on UCAS Search in September 2022

Position for
September 2022

=	1	Medicine	▲ ⁴	6	Pharmacy
=	2	Psychology	▲ ²	7	Computer science
=	3	Law	=	8	Physiotherapy
=	4	Nursing	▲ ²	9	Economics
=	5	Business	▼ ³	10	Midwifery

Change in position
since September 2021



WHO'S ENGAGING WITH UCAS?

Top five undergraduate pages on ucas.com in September 2022

Position for
September 2022

=	1	How to write a UCAS Undergraduate personal statement
=	2	Applying to university
=	3	Filling in your UCAS Undergraduate application
=	4	When to apply
New page	5	Access your application

Change in position
since September 2021

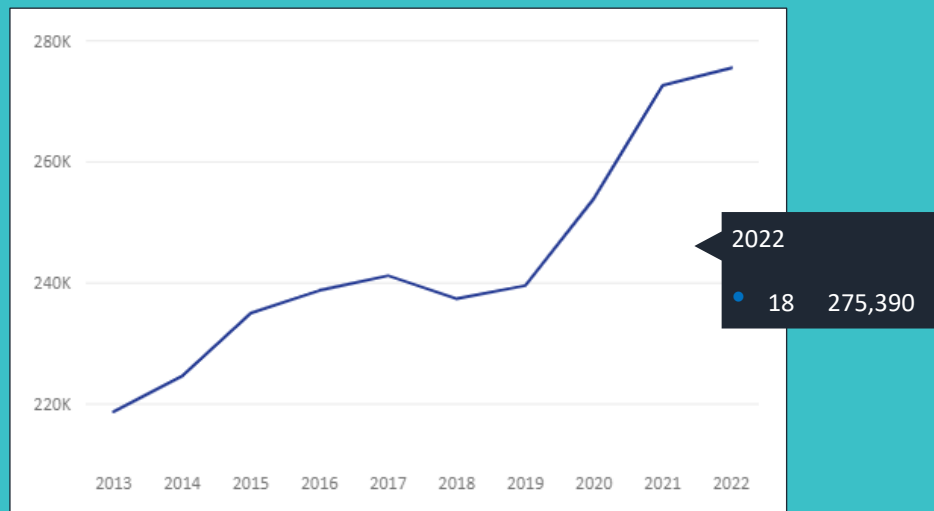


Day 28 analysis

Key headlines from the 2022 cycle, 28 days after JCQ results day

DAY 28 ANALYSIS

Number of accepted applicants (UK 18-year-olds)

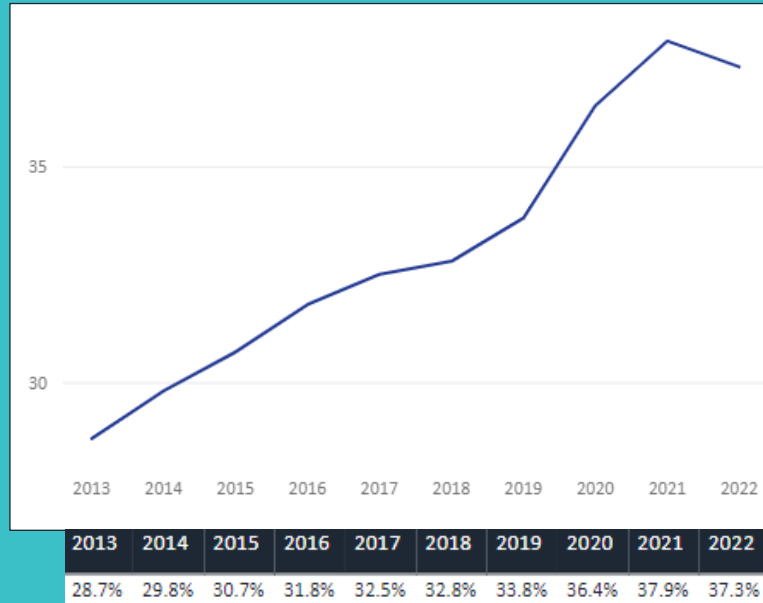


In total, just over half a million students have been placed in higher education – **the highest figure for a non-Covid year**. Within this, we have seen a record number of 18-year-old students placed from the UK...



DAY 28 ANALYSIS

18 year old entry rate

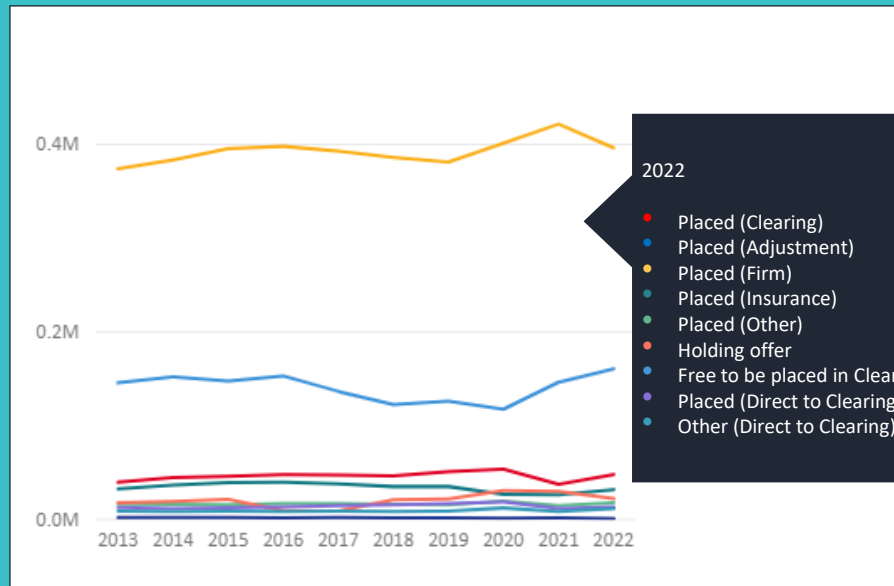


...While this represents a **slight decline** in the entry rate compared to 2021, it is 3.5 percentage points higher than 2019, the last time exams were sat, and remains on an **upward trend**.



DAY 28 ANALYSIS

Number of applicants by applicant status



Nearly 60,000 students have been accepted via **Clearing** – 9 per cent of the total cohort, compared to 10 per cent in 2019.

The choices on offer are comparable to previous cycles, with **30,000 courses available at peak**.

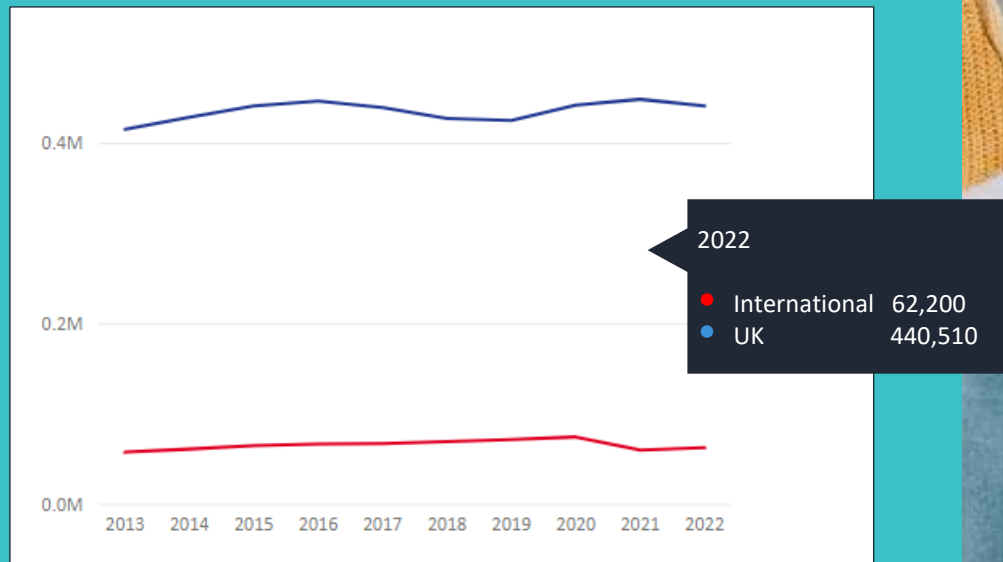
We know a significant number of students have **used Clearing to revisit their choices**.

In 2019, UCAS introduced “**Decline my Place**”, making it easier for students to exercise choice.

This year, **over 14,000 UK 18-year-olds used this functionality to secure a new place**, with the vast majority of these applicants going to a choice within the same or higher tariff grouping.

DAY 28 ANALYSIS

Numbers of accepted applicants by domicile



Overall, 12 per cent of accepted students are from outside the UK. This number has fluctuated slightly over recent years, and is lower than 2019 (14 per cent), with 9,000 fewer accepted international students.

DAY 28 ANALYSIS

Number of accepted applicants for Non-EU & EU countries

Accepts by top five non-EU countries:

16,720	China
4,400	India
3,710	Hong Kong
2,710	Malaysia
2,050	USA

Accepts by top five EU countries:

2,490	Ireland
1,270	France
1,160	Spain
870	Italy
810	Cyprus (European Union)

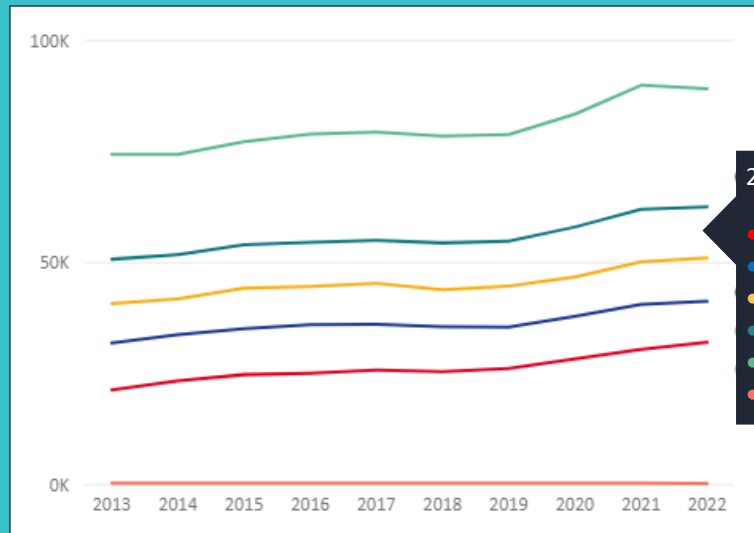
Demand continues to be driven by **China**, with a 23 per cent increase in accepted applicants from this country. The number of accepted applicants **from China has doubled since 2018**, and we have **more** accepted students from China than we do **Northern Ireland** – the number will most likely **overtake Wales** in the next few cycles.

However, this will be challenged by an increasingly competitive global environment, where the **UK has lost market share** over the last decade.



DAY 28 ANALYSIS

Number of UK 18-year-old accepted applicants by POLAR4



2022

- Quintile 1 31,890
- Quintile 2 41,110
- Quintile 3 50,860
- Quintile 4 62,400
- Quintile 5 88,940
- Unknown 180

We now have **23 per cent more** 18-year-old students from **the most disadvantaged areas** placed in higher education compared to 2019, along with a narrowing of the POLAR4 Q1 to Q5 entry rate ratio from 2.31 in 2019 to 2.12 in 2022. **Growth has continued in 2022**, with a 5 per cent increase in placed applicants from the most disadvantaged backgrounds this cycle.

Explore the day 28 data further

Explore the data further in our **interactive dashboard** which provides core numbers for the current cycle, comparison data over ten cycles, and graphical illustrations of key trends.



What does this mean for future years?

UCAS forecasts that by 2026, we could see **up to 1 million** undergraduate applicants. The 2022 cycle has given us an insight into what this may look like, with the **reduced offer rate** from highly selective universities and an **increased use of Clearing**.

Next year, we expect to see **the application rate continue to grow**, as will the **total number of 18-year-olds in the population**. Therefore, we expect more applicants, with grades returning to pre-pandemic standards.

We predict this environment will exist for the remainder of the decade.





We continue to highlight this increase in demand, driven by the **growing 18-year old population** and **continued global attractiveness**. It is vital that, as a sector, we **recognise this growing competition** and the impact it will have on future cohorts.

The 2026 cohort is today's Year 10 in school, and therefore the **advice and guidance** we give to these students needs to **reflect the changing dynamics**.

As a result, UCAS will publish further insight on **this journey to a million** early next year, bolstering our analytical expertise and knowledge, and allowing us to continue **supporting students' aspirations** by making them aware of **all the options available to them**.

PAD23 Resources Survey

Key findings from our pre-applicant survey

The survey was sent in June 2022 to a sample of potential applicants interested in starting uni in 2023. Results from the survey are representative of the respondents only. 439 responded to the survey.

Not all respondents knew what a prospectus was, but almost all those who did found them to be useful.

27%

27% didn't know what a prospectus was.

79%

For those who did know, 79% had used one at the time of the survey.

99%

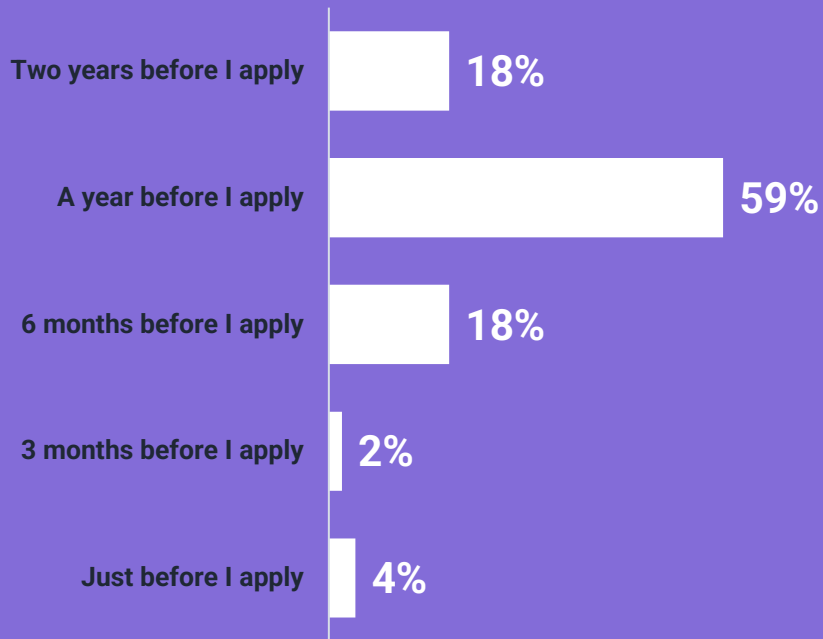
99% found them to be at least somewhat useful. 81% found them to be either extremely or mostly useful.



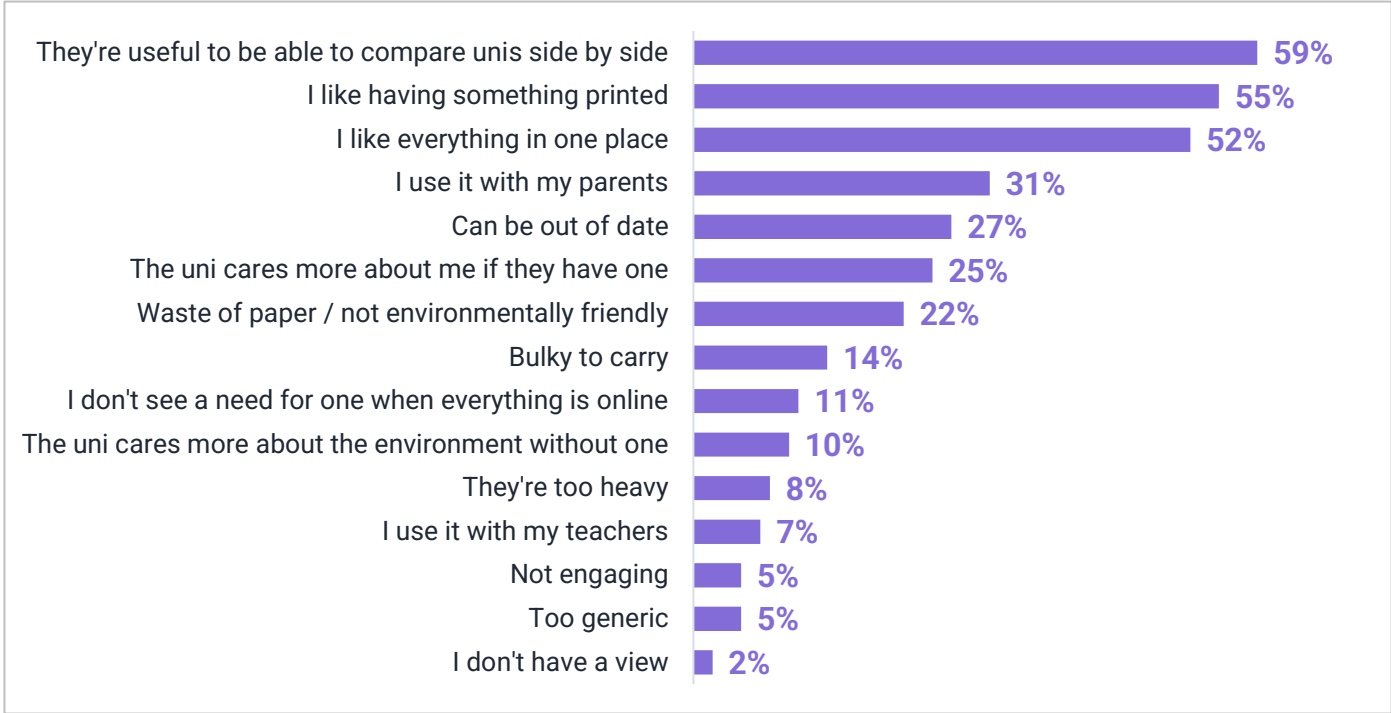
Questions;

- Do you know what a university/college prospectus is?
- Have you used a university or college prospectus?
- How useful was the content of the university or college prospectus?

The majority of respondents would prefer to receive a prospectus one year before applying.

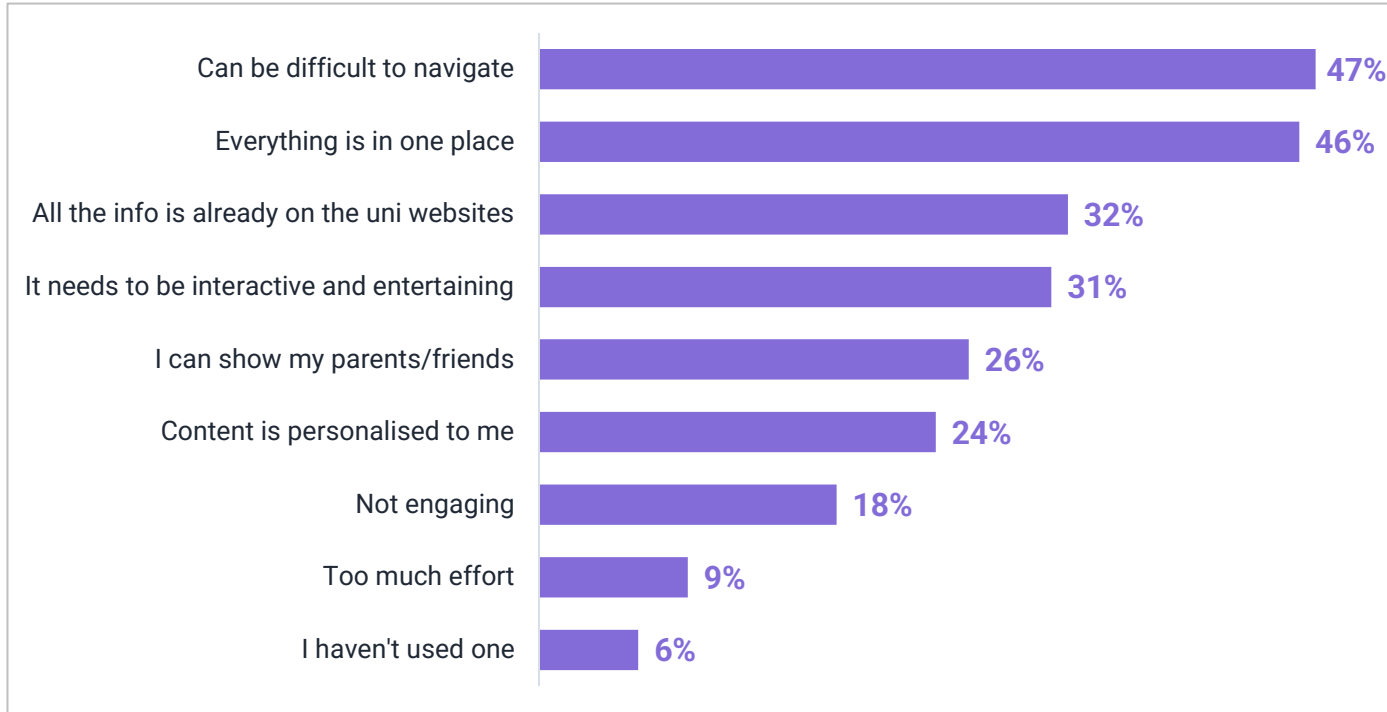


The majority of respondents thought that the benefit of a printed prospectus was being able to compare unis side by side, and to have everything in one place.



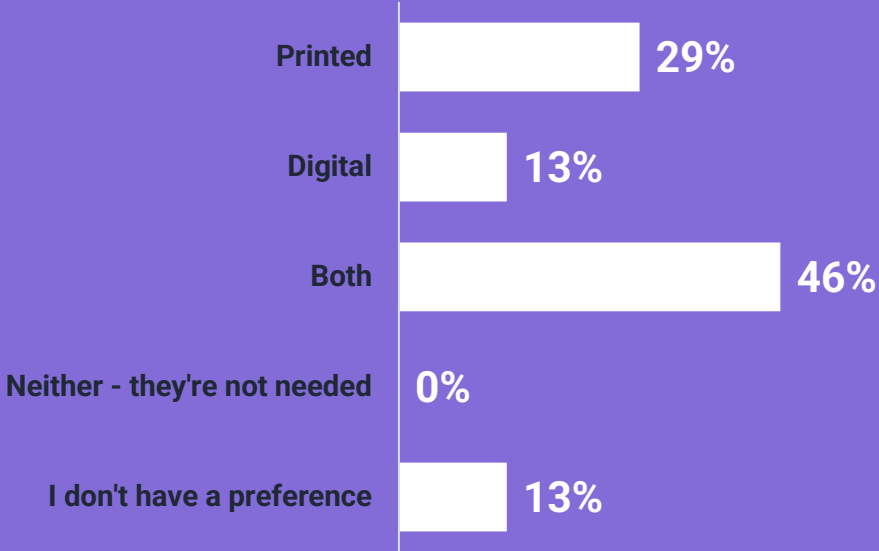
Q: What are your views of traditional printed prospectuses? Please tick all that apply.

Respondents found digital prospectuses difficult to navigate. Having everything in one place was important across both printed and digital prospectuses.

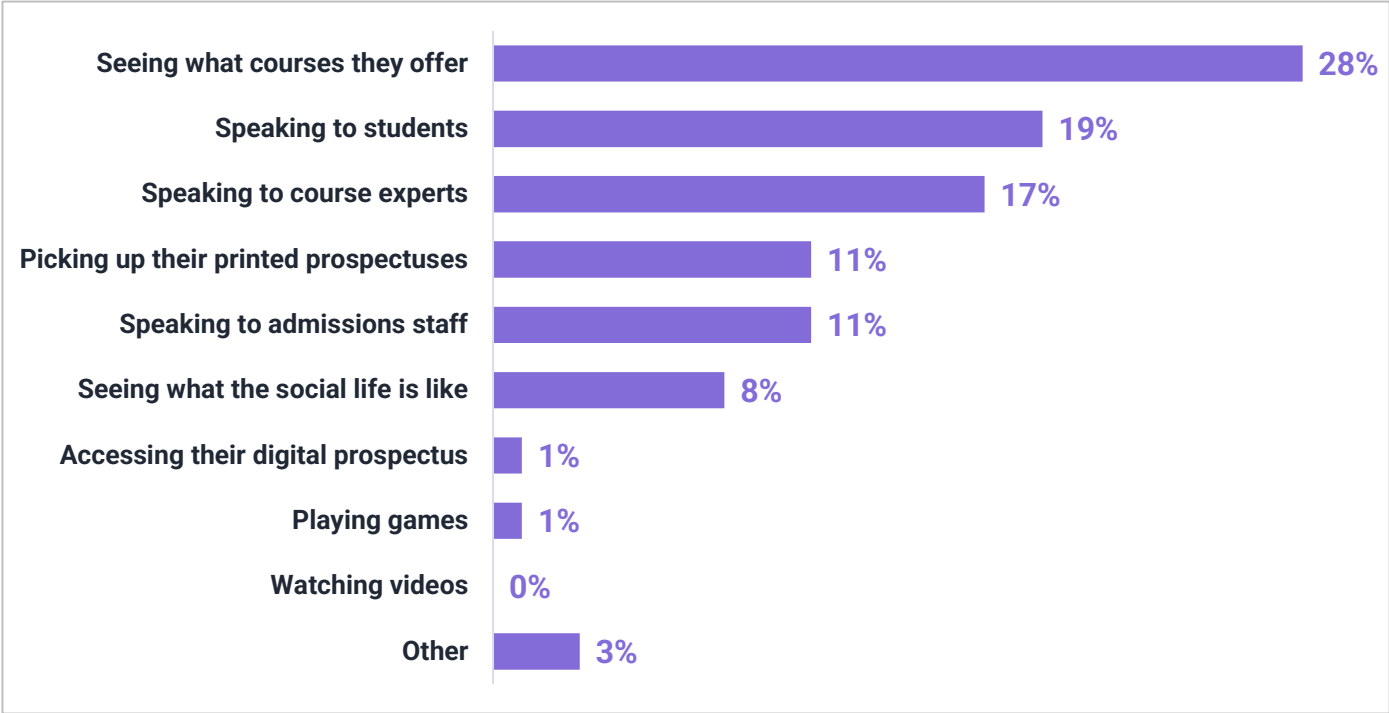


Q: What are your views of digital prospectuses? Please tick all that apply.

Printed prospectuses were preferable over digital, but given the choice, most respondents would like to view both versions.



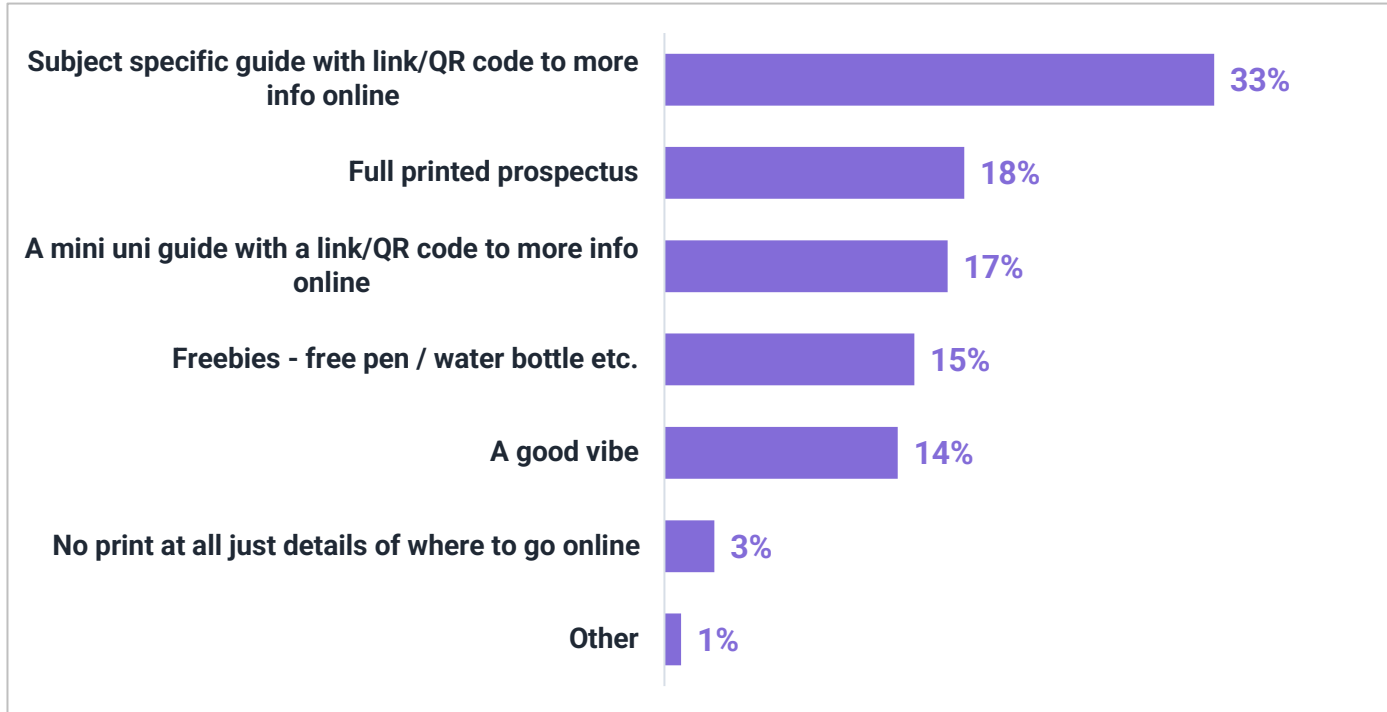
For respondents who had attended a uni exhibition, seeing what courses the uni/college offered was what they liked most about meeting the uni/their stand.



Q: What did you like the most about meeting them / their stand? Please tick one option.

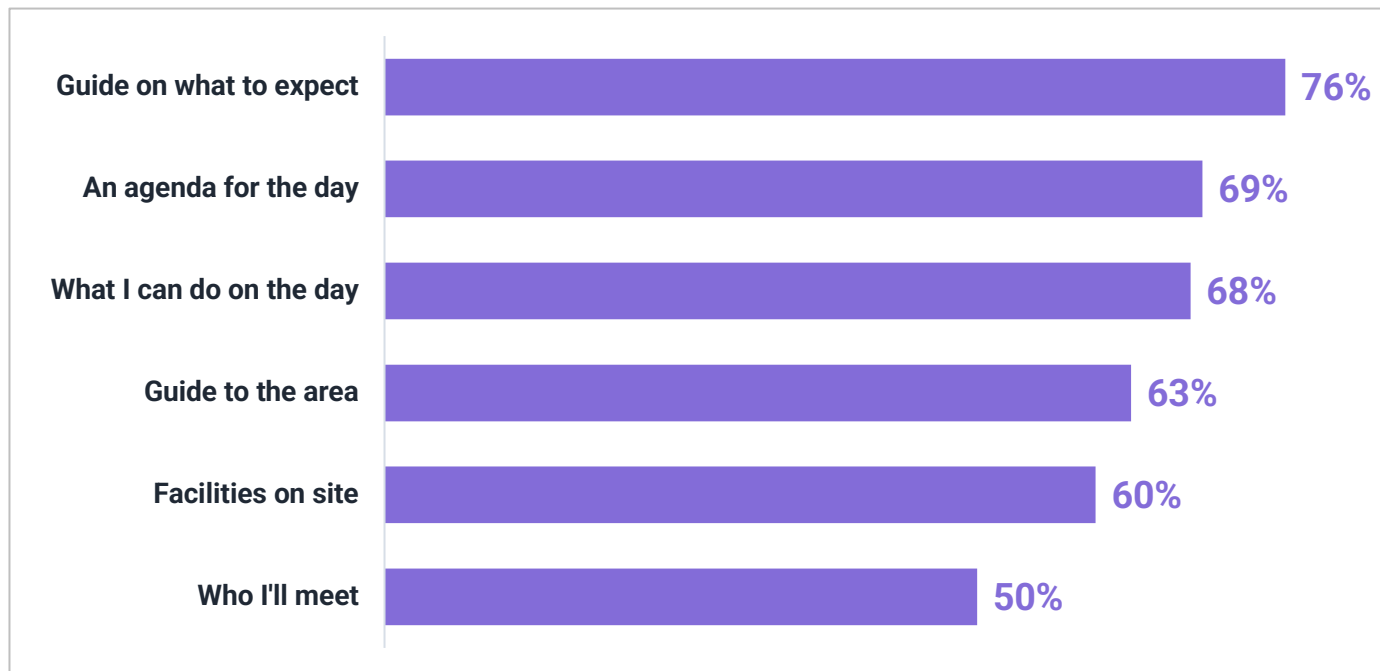
(Question only asked to respondents who had been to an event to meet a uni/college. 64% (272 respondents) had been to an event at the time of the survey).

A subject specific guide would be more preferable than a full printed prospectus to take away at an exhibition.



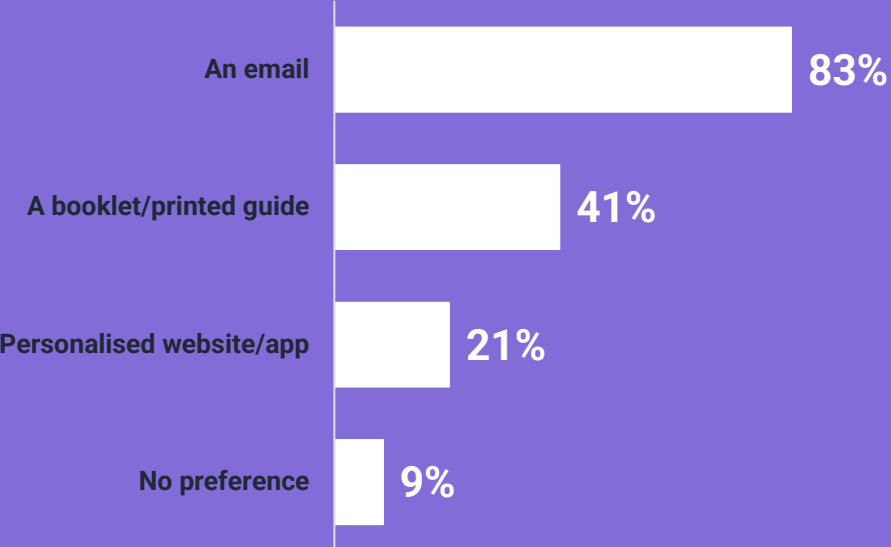
Q: Ideally what would you take away from a university/college exhibition stand?
Please tick the most important one to you.

Ahead of attending an open day, respondents were keen to know what they could do whilst there.



Q: If you are attending an open day/campus event, what do you want from the university or college before you arrive? Please tick all that apply.

After booking an open day, respondents would prefer to receive info from the uni/college via email.



Q: How do you want to receive information from universities and colleges after you've booked an open day/campus event? Please tick all that apply.

The top three sources to search for courses or universities were:

78% ucas.com

59% Google

44% University prospectus



Key findings

- 27% didn't know what a prospectus was.
- For those who did, **printed prospectuses were preferable over digital**, but given the choice, most respondents would like to **view both printed and digital** versions.
- The majority of respondents (59%) would prefer to **receive a prospectus one year before applying**.
- Across both digital and printed prospectuses, having **everything in one place** was important to respondents.
- At an exhibition stand, respondents were **more likely** to take away a **subject specific guide** than a full prospectus (33% vs 18%).



The post-pandemic world is strange and new – but it's growing.

There are plenty of surprises in this year's post-exam findings.

And together, they paint a positive picture for the future of the sector as we exit the challenging pandemic years. With application records broken, incredible international growth, and students finding clever, ambitious ways to use Clearing to their own benefit – it's shaping up to be a great year.

But for all the headlines, it remains crucial that we don't forget the individual student. Busier campuses and more competitive courses may well be industry markers of positivity, but for students tackling their own post-pandemic anxieties, our pastoral responsibilities could be more important than ever.

We'll see you again in November.

Get in touch

For further information and insights contact your UCAS Customer Manager or email us at educationservices@ucas.ac.uk.