

# ARC Council

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**Clare Marchant**  
Chief Executive



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# Future Focus: Delivery against our strategy



## Admissions services

- New service for **agents** managing international student applications.
- Improved functionality **adviser portal**.
- Enabling students to **decline their offer** and go into Clearing.
- Enhanced **direct contact service**.



## Information and advice

- New **UCAS Hub** to help students explore the range of post-18 opportunities.
- **Discount platform** for retail products and services.
- **Unibuddy partnership** to facilitate peer-to-peer connections



## Efficiency and value

- Revenue generation through new **tenant at Rosehill**.
- Delivering sales growth and containing our cost base resulting in a **better financial position**.
- Diversification of products and markets in UCAS Media has seen a **steady 7% growth**.



## Data and Insights

- **Postgraduate Application Insight Service** for competitor comparisons.
- Improved **data visualization**.
- Launched **consultancy and insights** service.
- Key data insight reports such as **MEM**, **TEF**, and **Admissions for Mature Applicants**.



## Customer experience

- **Single source for student data** within the Customer Experience Centre (CXC).
- Efficiencies gained through the implementation of **audience segmentation counts** for UCAS Media campaigns.



Corporate Strategy 2020-2025

**With UCAS, You Can...**

# We're driven by our strategic objectives

Inspire  
and empower  
people to make  
aspirational  
choices about  
higher education  
and learning

Deliver trusted  
and flexible  
admissions  
services for the  
digital age

Be the  
go-to place for  
higher education  
data-driven  
insights

Embed efficiency  
and value in  
everything we do

Be an employer  
of choice where  
people flourish,  
perform, and  
achieve

Connect the  
world to higher  
education

# With UCAS, You Can...

## Share our sense of purpose

We're focused on our core purpose; to run an accessible, trusted, and personalised undergraduate admissions and information service.



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# With UCAS, You Can...



## Connect to more possibilities

We will augment our existing services and develop new ones to support individuals in accessing apprenticeships, modular study (including part-time and distance learning), and Level 4/5 provision.

# With UCAS, You Can...

## Thrive in a changing world

We will help shape the two admissions reviews to boost progress towards widening access and participation goals. We will use our services and data insight to support the skills agenda to inform and drive individual and organisational choices.



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# With UCAS, You Can...

## Achieve what you're aiming for

As an **individual**, you can:

Receive dynamic, personalised information and advice from UCAS and partners, based on your individual preferences and circumstances.





# With UCAS, You Can...

## Achieve what you're aiming for

*As an **adviser**, you can:*

Access information tools to help your students make aspirational decisions and to make effective applications.



# With UCAS, You Can...

## Achieve what you're aiming for

As an ***education and training provider***, you can:

Have an engaging and flexible platform to market a large and diverse range of study opportunities, and to connect and build relationships with individuals.

# With UCAS, You Can...

## See all your learning choices

Higher and degree apprenticeships

Part-time study

Distance study

Modular

Level 4/5



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# HE Admissions Reviews – Change and Reform

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# Key questions for the Admissions Reviews

Do students have **transparent** and  
**fair choice**?

Are students making  
**aspirational choices**?

How can we be confident that HEPS  
practices are always in the **best  
interest** of the student in a highly  
competitive market?



# Principles of fair admissions

1. Be transparent, and provide consistent and efficient information
2. Select students who are able to complete the course as judged by their achievements and potential
3. Use assessment methods that are reliable and valid
4. Minimise barriers to applicants
5. Be professional in every respect and underpinned by institutional structures and processes.



Each cycle, UCAS  
applicants hold over

**750**

different qualifications,  
something that is  
almost unique to the  
UK





# Admissions around the world: PQO is the norm



## Pre-QA

 Canada (Ontario)

 Denmark

 USA

 UK

## Middle ground – pre- apply, post offer

 Australia

 Canada

 Croatia

 Finland

 France

 Germany

 Ireland

Netherlands

## Post-QA

 China

 Denmark

 Kenya

 UK

# Size of the pools

**700,000 students**  
from over  
**200 countries**  
and territories  
apply to UK HE  
each year.

**130,000** apply from  
outside of the UK.

**160,00** UK domiciled applicants  
apply holding qualifications.

**50,000** apply from Scotland.

**20,000** apply Direct to Clearing &  
**40,000** Records of Prior Acceptance

**300,00** UK  
domiciled  
students apply  
holding pending  
qualifications.

# Reforms to promote choice and transparency



## Enabling **choice** switching:

- Allow students to hold multiple options for longer to encourage aspirational choices
- Allow providers to make multiple upfront offers (upfront change of course offer).



## Predicted **grades**:

- Using data science to predict the future achievement of students to supplement the predicted grade.



## Shinning the light on **entry requirements**:

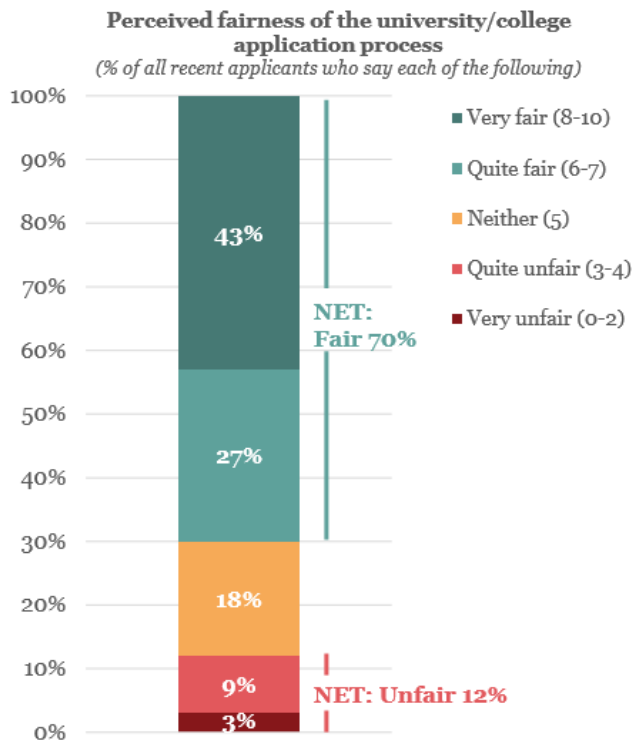
- Publish information about entry qualifications to provide students with meaningful information on what providers accept.



## Simplify the **application**

- Make the personal statement and reference more relevant to the individual applicant

# Fair Admissions Review



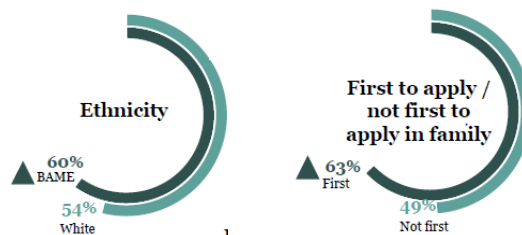
Universities UK | The voice of universities

## Common reasons for university application process being viewed as unfair:

1. Careers advice wasn't very helpful
2. Application process too long
3. I didn't have all the information to make informed choices



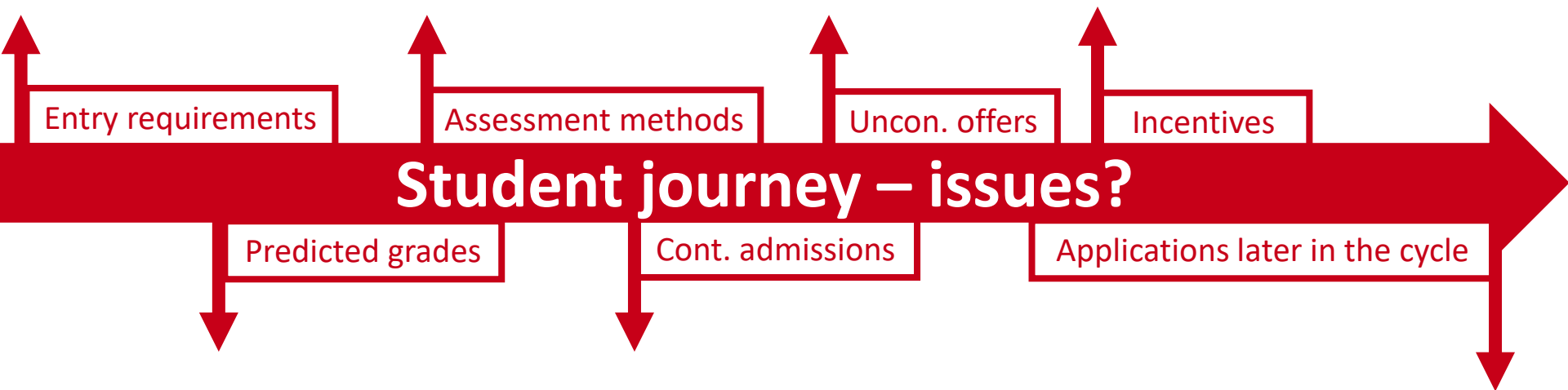
"I think universities/colleges should only make offers after people have received their academic results"



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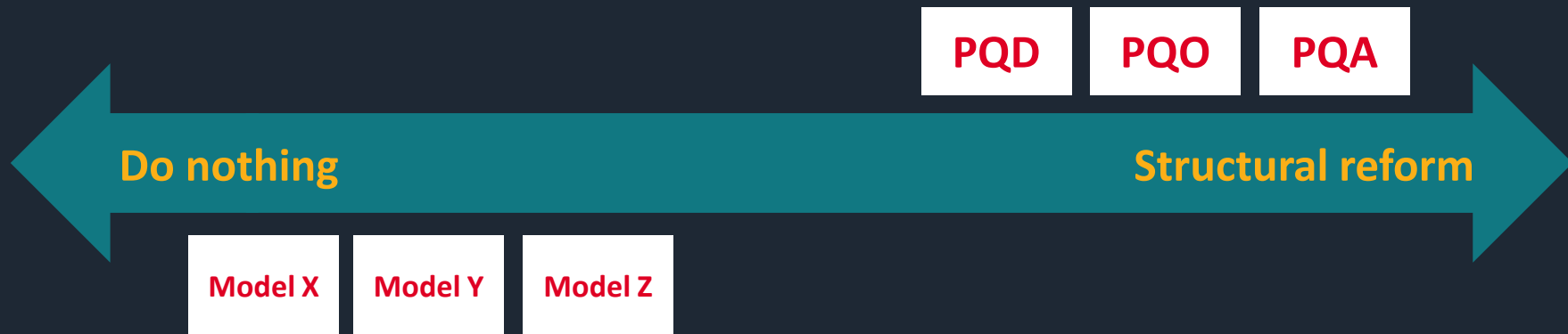
# OfS admissions review



## Cross cutting issues:

- Transparency of the admissions process
- Applicant experience of the admission process
- Stakeholder perceptions of the extent to which the English HE admissions system is fair and effective

# Spectrum of reform



# Trends 2019





# 2019 trends



1. Record UK 18 year old entry rate to higher education.

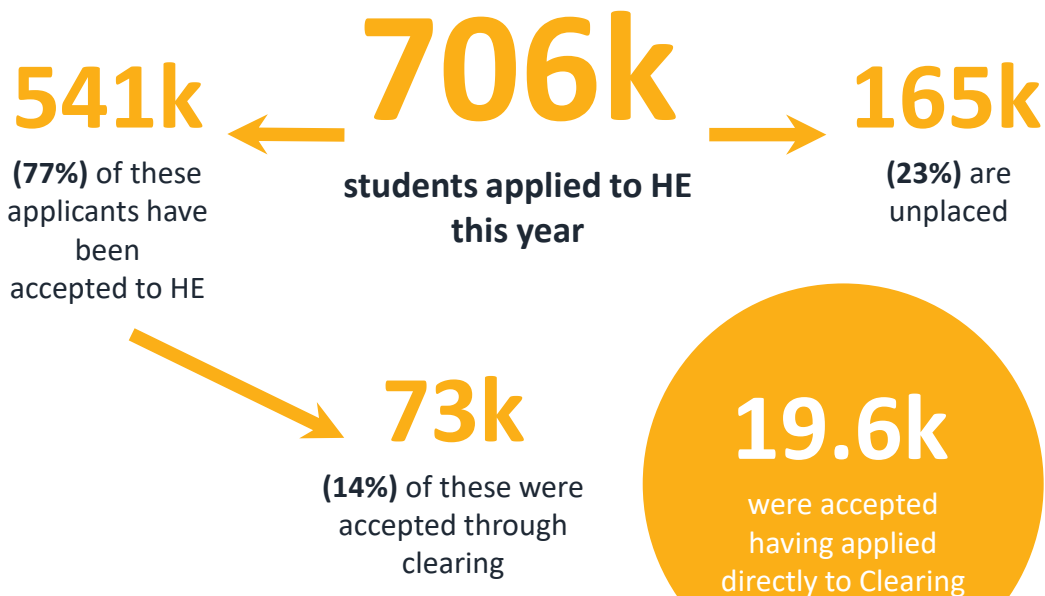
2. Providers are doing more with offer-making to secure applicants.

3. Slow narrowing of the gap in widening HE participation.

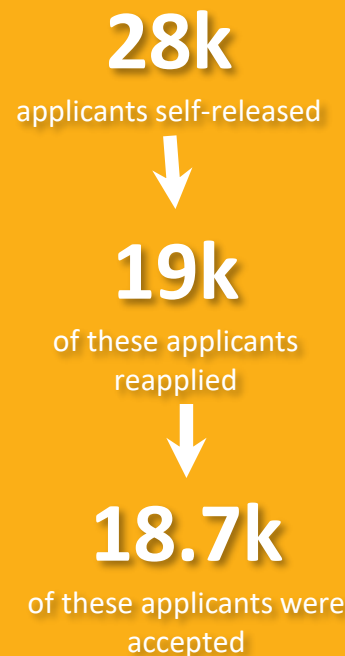
4. Trends in the provider market and admissions qualifications.

# Key numbers

## Acceptances



## Self-release



**Record UK 18  
year old entry  
rate to higher  
education**



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# Patterns by age continue recent trends

18

**242k** acceptances

Entry rate **34%**

A record high for entry  
at age 18

19 – 29

**181k** acceptances

-1.4% YoY change

Declining numbers of this  
group, participation being  
brought forward to 18

30+

**41k** acceptances

+12.8% YoY change

(Figures based on UK domiciled students)

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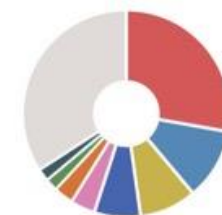
# Global HE market

International HE market has increased from [2.1m in 2001 to 5.0 million in 2018](#), but our share of the market is down.

The UK is second most popular host destination after the US, although now holds this position jointly with China.

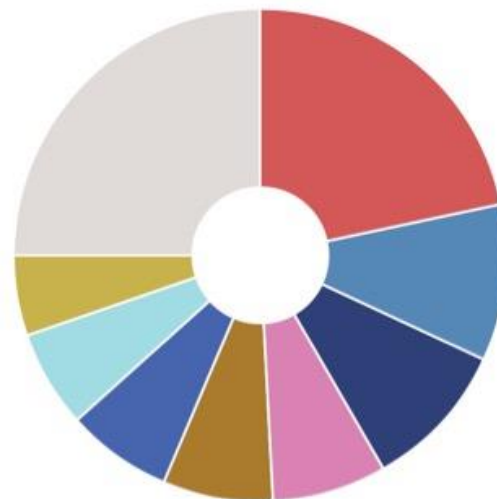
Australia and Canada continue to grow their market share.

TOP HOST DESTINATIONS, 2001 & 2018



2001

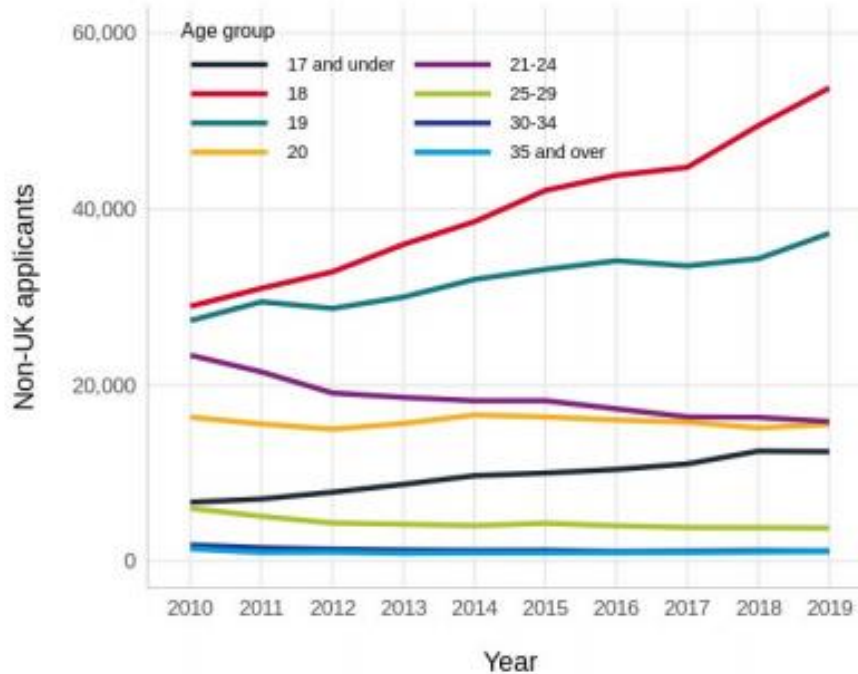
2.1 million students



2018

5.0 million students

# International increases driven by younger applicant age groups



Younger age groups increases driven by nonEU countries

## China:

18 year old up by 40.1%

19 year old up by 36.6%

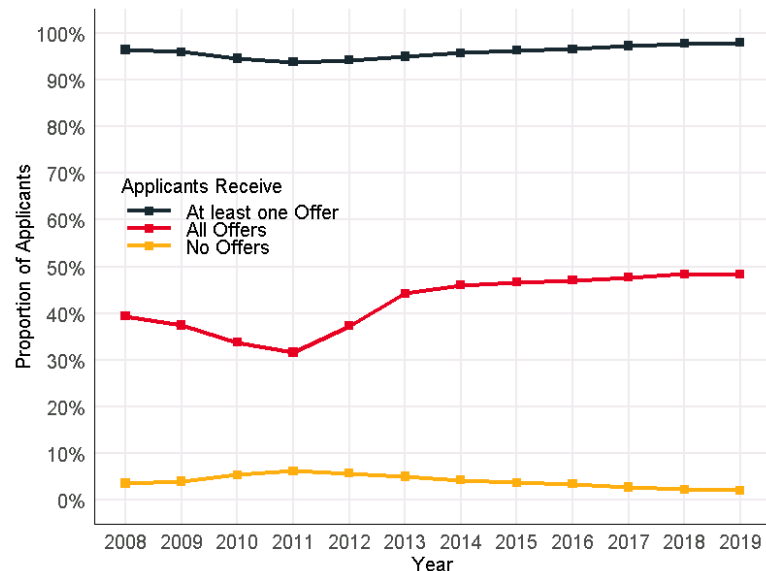
## India

18 year old up by 7.2%

# Nearly all 18 year old ENW applicants receive at least one offer by 30 June

(and nearly half are receiving offers from all their choices)

More applicants are now receiving a wider range of offer types.

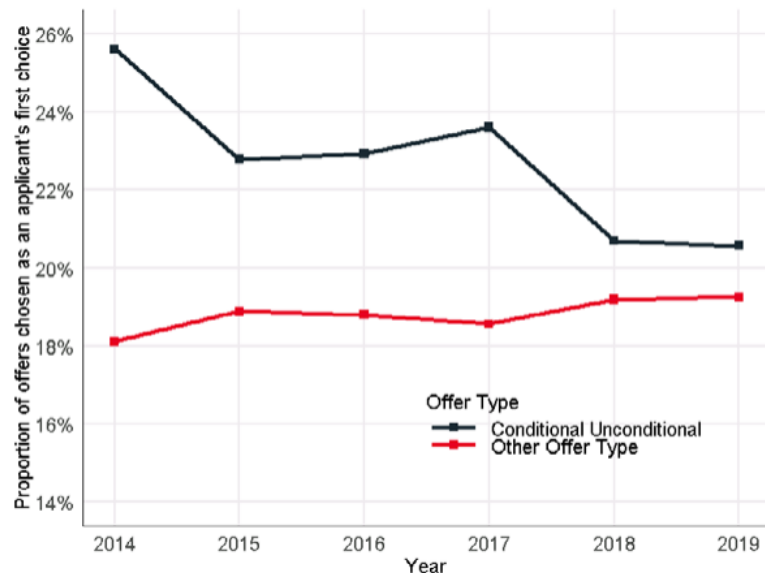


Based on 18 year old main scheme applicants from England, Northern Ireland, and Wales – a group who typically apply with most of their qualifications still pending.

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# The influence of conditional unconditional offers is waning



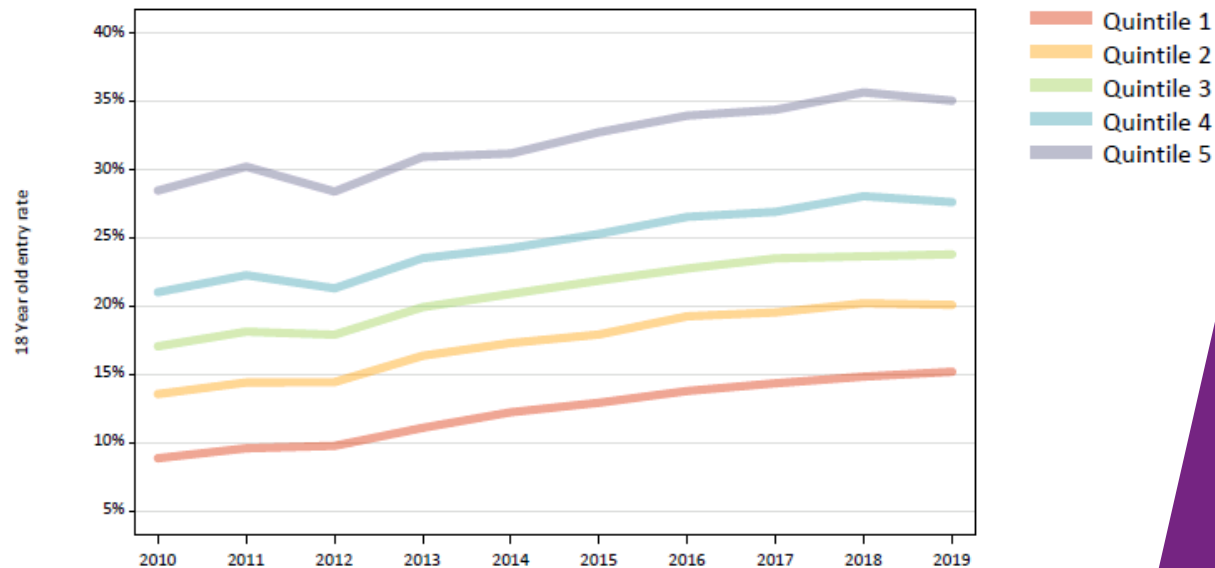
## 26%

more conditional unconditional offers in 2019 than in 2018.

However, acceptance of conditional unconditional offers varies significantly by subject and provider:


Linguistics/classics less likely to be selected than business/ administration studies.

# UK entry rate gap reduces slightly in 2019



(Figures relate to UK domiciled students)

Using POLAR4 to define disadvantage, the proportion of 18 year olds living in the most advantaged areas who have secured a place in HE through UCAS is **2.3x** that of their peers in the most disadvantaged areas (compared with **2.4x** in 2018).



**Providers are increasingly recognising the importance of contextualised admissions**

## **MEM**

Sex  
Ethnic group  
FSM status  
IMD  
POLAR3  
School type

Some providers are starting to use MEM (our multiple equality measure), and students want their background taken into account.

We have agreed to build a Scottish MEM to complement SIMD, as well as looking at other variables that can be included, e.g. care-leaving status.

Nearly two thirds of applicants agree that universities should lower entry requirements for applicants from poor schools or areas.

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2020 to date

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# 2020: What we know so far...

# 39.5%

(record 18-year old  
application rate)

UCAS forecast up to **75%** of  
universities and colleges which made  
**conditional unconditional offers** in the  
2019 cycle will no longer make these  
in 2020



First time more than 50% of London 18 year olds have applied to university



Almost 1/4 young people from the most disadvantaged areas have applied



Applicants between 30 – 34 has increased for the first time in five years, mainly to rise in mature nursing apps



Record 73,080 applicants from outside EU; driven by a 33.8% increase from China, and 32.9% from India



# UCAS Developments



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# “I’m overwhelmed by all the choice...”

## Get organised

Tools to search, favourite, shortlist, reflect, diary and build application



## Define what’s important:

Distance from home, teaching satisfaction, work experience options, job outcomes...



## Link applicants and advisers:

Flag to advisers before deadline students that are struggling



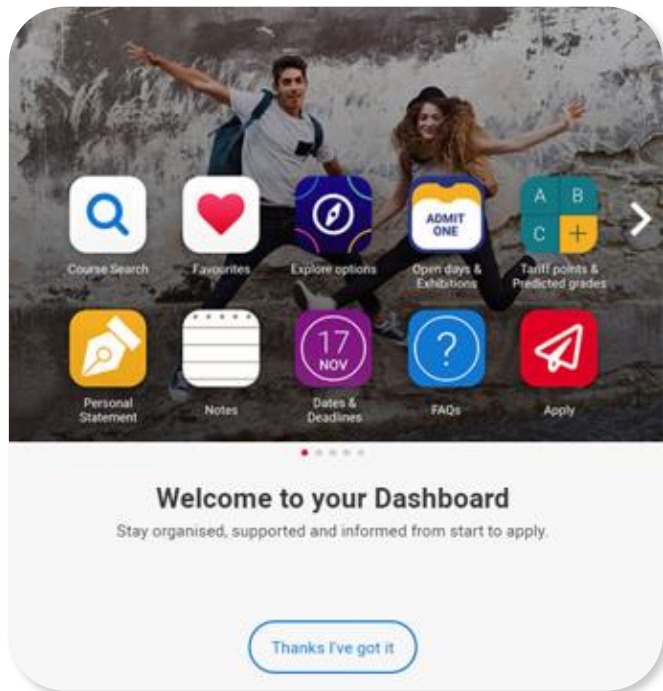
## You might not have thought of...

Expand horizons by pushing options they might not have considered





# The UCAS Hub



39%

said they are now considering universities with higher entry requirements.

73%

of students are now thinking of applying to universities or colleges that they hadn't previously considered

60%

said the Hub has made them actively think about an option that they weren't initially considering

1/4

of students specifically said they would now think about applying for an apprenticeship instead of, or as well as, studying for a degree.

# The demand for Apprenticeships

25%

of applicants declining all offers in 2018  
told us they had chosen an  
**apprenticeship** instead



30% of students want  
apprenticeship info alongside HE



Apprentice info and advice up  
111% on UCAS.com



94% growth on UCAS Career  
Finder for apprenticeship  
vacancies



Almost 50% of PAD for 2020 entry  
want more apprenticeship info

# Our plans for Apprenticeships

Parity of **visibility** in Search

Improve Apprenticeships  
Information services for **students**  
and **teachers**

Test an 'Apprenticeships Matching  
service and Talent Pool'

Specific and integrated data insights  
products and services

# What's coming up in 2020?

## Civitas Partnership



- Behavioural analytics to understand and improve the student experience and outcomes
- The power of UCAS data and insight with US data science company that is dedicated to helping HE improve student success

## New products

- Accommodation
- Unibuddy
- UCAS app
- New Tracker
- New data products in UCAS Hub

## UCAS Sync

- Working with providers to define Sync offering and prepare our technology for reforms
- Clearing Plus in 2020: new online matching tool in Track
- Providers can target specific student groups – eg WP

**Thank you**



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