
Generation COVID-19: A confidence and contact challenge

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With UCAS you can... Discover your future

- We're an independent charity with a commercial subsidiary, UCAS Media. Our annual revenue is **£50m**
- We understand the demand for higher education and publish **open data and insights** throughout the year
- Every year, we help around **700k** students from over **200** countries and territories, apply to full-time undergraduate courses, at nearly **400** UK universities and colleges

Who is the student?

58% of 18 year old UK applicants hold **3 or more A levels**

13% of applicants are aged **25 and over**

20% of applicants are from **outside the UK**

12% of UK 18 and 19 year old applicants are from **FE colleges**



13% of UK applicants disclose a **disability or mental health condition**

29% of applicants are from **POLAR4 Q1 and Q2**

14% of accepted applicants are placed through **Clearing**

c.20K apply **directly to Clearing**

What is important to students?

| Lower Tariff | | | Medium Tariff | | | Higher Tariff | | |
|--------------|-------------------------|--|---------------|----------------------------|--|---------------|----------------------------|--|
| 1 | Range of modules | | 1 | Range of modules | | 1 | Range of modules | |
| 2 | Communication | | 2 | Student reviews | | 2 | League table position | |
| 3 | Student reviews | | 3 | Social life | | 3 | Social life | |
| 4 | Earning potential | | 4 | Communication | | 4 | Student reviews | |
| 5 | Location | | 5 | Location | | 5 | Location | |
| 6 | Work experience | | 6 | Earning potential | | 6 | Accommodation quality | |
| 7 | Social life | | 7 | Accommodation quality | | 7 | Accommodation availability | |
| 8 | Fit with other students | | 8 | Fit with other students | | 8 | Fit with other students | |
| 9 | Ease of travel | | 9 | Work experience | | 9 | Earning potential | |
| 10 | Accommodation quality | | 10 | Accommodation availability | | 10 | Accommodation proximity | |

The impact of COVID-19: decision-making for the 2020 cohort



Our COVID experience

Coordinating announcements

Supporting stability

- Extending deadlines
- Making data led decisions
- Student surveys

Going social:

- FB Live sessions
- BBC Bitesize content
- 80% increase in social interactions

Maintaining services:

- No service interruption
- Core staff on site over results day



Sentiment vs reality

What they said in June

- **8%** of students told UCAS they wanted to **defer**
- **One in five** said they would change their firm choice decision
- **35%** of students said they anticipated they would need to use Clearing

What happened

- The proportion of students with a confirmed deferred place is **similar to last year** (5.7% in 2020, 5.4% in 2019).
- Less than **one in 10** have used 'decline my place' to change a choice (up 25% up on last year)
- We project a record **80%+** of applicants will be placed at their firm choice

2020 cycle headlines



- More than **515k** placed applicants (+4%)
- No 'spike' in **deferrals** (+0.3 ppt increase in proportion of deferred accepts)
- **EU** a 'challenge' with travel limitations and imminent visa changes (-2%)
- **International** picture is cautiously optimistic (+9%), with key markets of China (+27%) and India (+24%), demonstrating impressive growth
- Higher **Tariff** growth (+12%) has not been at the expense of others. Recruitment to medium and low Tariff has remained stable.

2020 – (superficially?) the best year yet for WP?

- Gap in entry rate between Q1 and Q5 **narrows** to record low 2.24
- Highest ever number of Q1 and Q2 students accepted at **Higher tariff** providers
- More than **double** as many Q1 students accepted to higher Tariff this year than in 2011

... A retention challenge?

98%

of applicants have
concerns about starting
university in Autumn

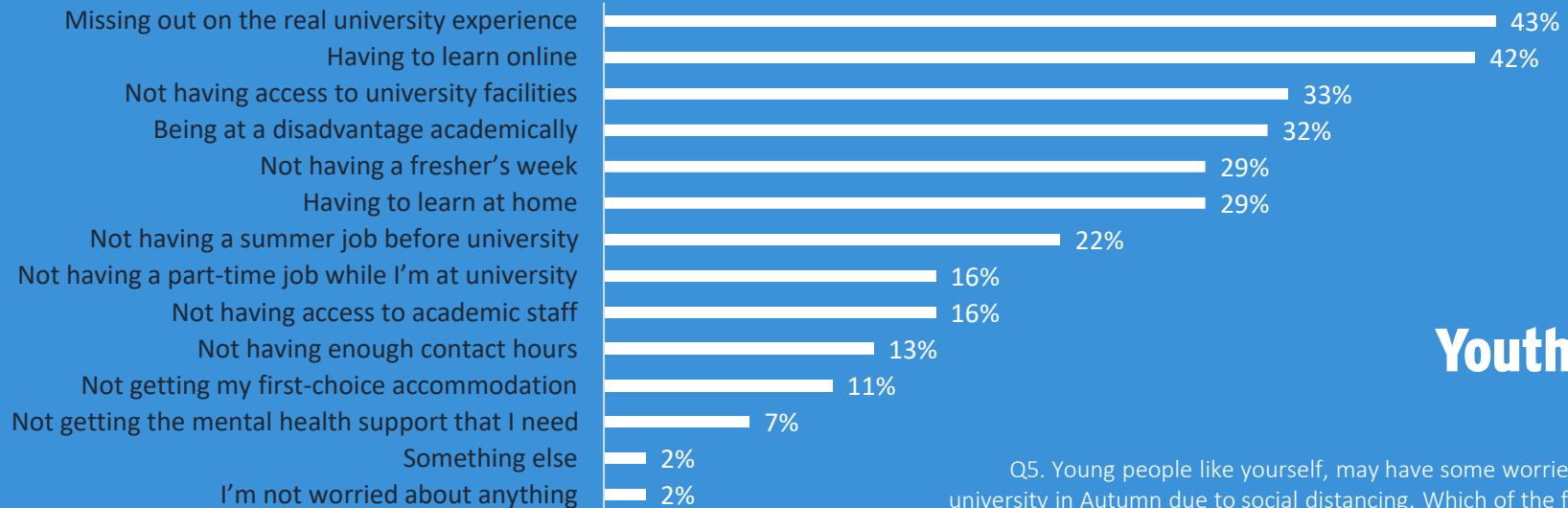
Q5. Which of the following, if any, are you personally worried about?
Base: All respondents (522) May 11th 2020



YouthSight

Applicants need a lot of different reassurances this year

% who ranked each in their top 3 worries



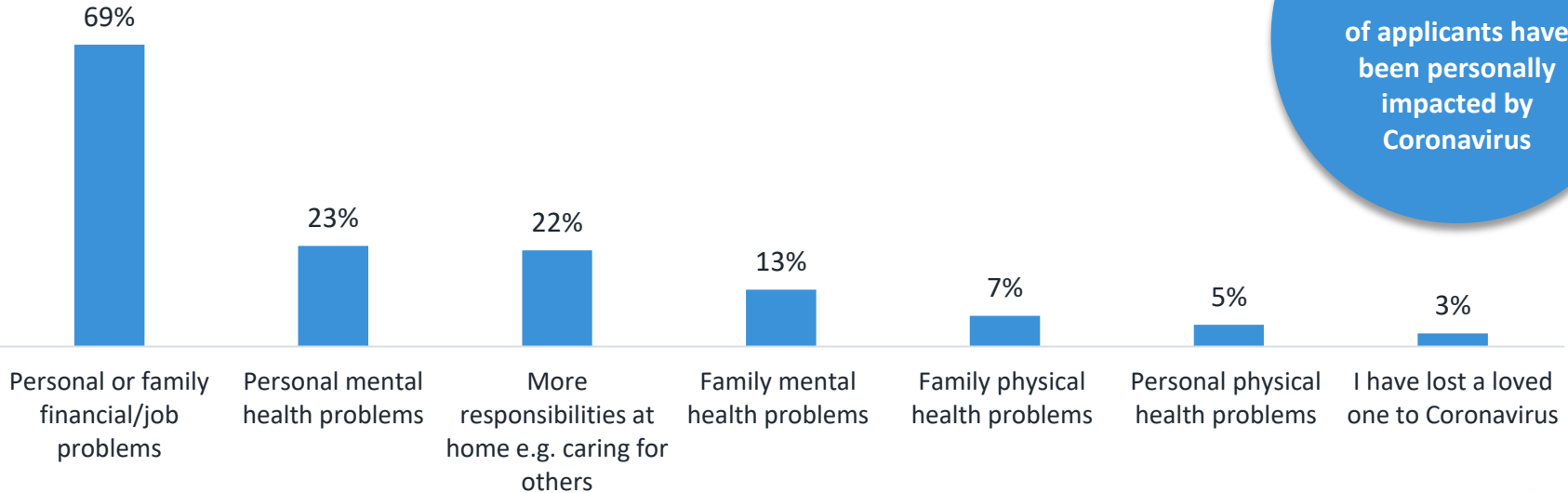
YouthSight

Q5. Young people like yourself, may have some worries about starting university in Autumn due to social distancing. Which of the following, if any, are you personally worried about? Base: All respondents (522) May 11th 2020

A view to the future: 2021 and beyond



Covid-19 will have a lasting impact on our young people...



Q6. Young people like yourself may have been impacted by Coronavirus in different ways. Which of the following, if any, have impacted you as a result of Coronavirus? Base: All respondents (519) May 11th 2020

YouthSight

September survey of year 12 pre-applicants

Joint YouthSight research shows:

- 80% committed to go to university in 2021
- 87% started research, but only 27% have made their five choices
- Only 41% say they have enough information to make a decision
- 59% are worried that they haven't been able to visit universities

YouthSight

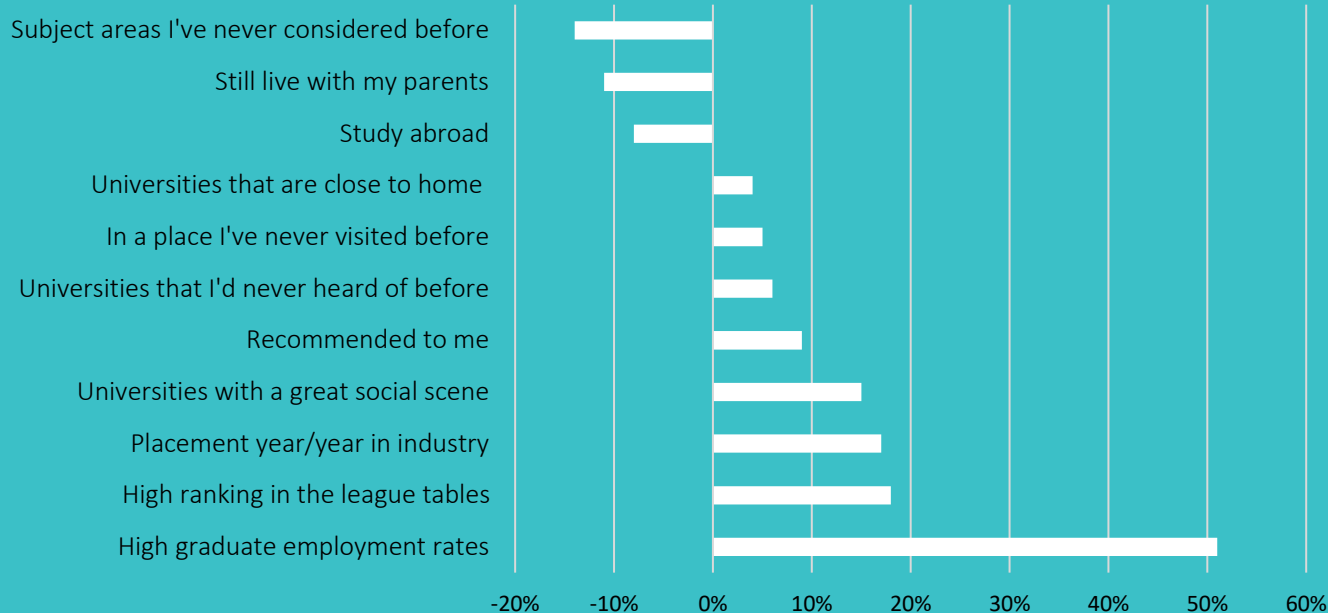
30%

of year 12s reported
zero hours contact time
during lockdown



Covid is changing priorities: jobs, placements, and rankings

Decision-making factors



Yr13s want
'recession
proof'
degrees

How UCAS is shaping the 2021 cycle

- Enhanced wrap-around package of information and advice – UCAS: ‘the application coach’
- Speeding up reference writing
- Visibility of Grades on Entry in adviser tools
- January start date filter
- The enhancement of Clearing Plus



Looking ahead



- Partnership is key

BBC
Bitesize

Which?



YouthSight

88%
say they
experienced
difficulties in the
application process

- Engaging information and advice is critical
- Parity of options is crucially needed

- The global HE market will be tougher than ever
- The reform which incentivises students to reach their potential has begun

Thank you

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