Aspiration, attainment and supporting Generation Alpha

Clare Marchant  
CEO, UCAS
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The changing landscape

- Teacher recruitment issues
- Quals changes
- Careers strategy
- Post-18 funding review
- Transparency agenda
- Increase in medicine places
- Trends in apprenticeship demand
- T levels
- TE(SO)F
- Tech disruption

Office for Students
HE as a global market
Changing profile of market share

Source: ICEF/IIE Project Atlas
HE as a global market
International destinations of increasing interest

UCAS survey data also reflects growing attractiveness of alternative destinations.

Number of UCAS applicants also applying to other destination countries up in 2017.

42% of parents would consider study abroad for children (HSBC report).
What is new for 2018?

• Ongoing introduction of reformed A levels across the UK, including additional subjects in England, and CCEA regulated A levels in Northern Ireland.

• Growing number of reformed GCSEs (9 – 1) entering HE.

• First substantive award of new style vocational qualifications.
We are offering the AS:

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>as a standard part of the programme of specific subjects</td>
<td>20%</td>
</tr>
<tr>
<td>only to specific cohorts of students, such as lower ability students</td>
<td>15%</td>
</tr>
<tr>
<td>only as an early exit award for students not progressing to the A level exam</td>
<td>25%</td>
</tr>
<tr>
<td>as a standard part of the programme for all students</td>
<td>20%</td>
</tr>
<tr>
<td>other</td>
<td>0%</td>
</tr>
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</table>
Current trends
Current trends
Headlines from 2017 & 2018

Slight fall in acceptances in 2017
- 0.2% fewer acceptances (-1,290).
- Still the second highest year on record.
- 18 year old demand increased with highest ever entry rate of 32.6%.

Acceptance rates continued to rise in 2017
- Overall acceptance rate rose 1.8% to 76.3%.
- Acceptance rate for 18 year olds highest ever at 85.6%.

January deadline 2018 saw a decrease in applicants of 0.9%
- A decrease of 5k from 2017.
- Application rate for 18 year olds reached record high of 37.1%.

Decrease has increased to 2% at March deadline 2018
- A decrease of 11.5k from 2017.

Decrease seen in mature applicants
- Partly driven by nursing.
- 5% decrease for 19 year olds at January deadline. Could we be seeing a preference to enter HE at 18?
Demand from 18 year olds continues to grow

The 18 year old population doesn’t stop falling until 2020.

Despite this, the number of 18 year old acceptances increased in 2017, as we saw the highest ever entry rate of 32.6%.

This increase in demand has continued into 2018, with the highest ever application rate of 37.1%. However, this was not enough to offset the population decrease resulting in a decrease of applicants.

20,000 fewer 18 year olds in 2018.
UK HE becoming an increasingly global proposition

2017 saw the **highest number** of acceptances from **outside the EU**, and the **second highest** for the **EU**.

At the March 2018 deadline, **applicants** from **outside the EU** have **increased** by 8%, and those from the **EU** have **increased** by 2%.

**Forecast for non-EU/non-UK applicants**

**Forecast for EU applicants**
Widening participation is an ongoing challenge

Some improvements using the POLAR3 measure, but no improvements using a multi-dimensional approach since 2014.

Improvements in both measures seen for higher tariff providers.

The MEM G5:G1 ratio has been falling each year for higher tariff since 2010.

STROBE is a service run by UCAS that can evaluate WP activity.
Clearing patterns are changing

Clearing was faster this year, with an increase in Clearing acceptances on day one.

An increase in total Clearing acceptances of 3.1% resulted in an extra 1.9k placed through this route.

16,950 placed via DTC, an increase of 2.1k from last year, indicates an increasing appetite to apply late in the cycle.

- 93% are UK domiciled.
- 67% of them are aged 20 or over.
Focus on the Midlands
Focus on the Midlands
HE trends in the Midlands

Demand for HE has increased from the Midlands

Compared to 2006, the West Midlands and East Midlands have seen an increase in entry rates of **8.0%** and **7.1%**.

Both also saw increases from 2017 of **0.6%** and **0.4%** respectively.

Midlands applicants among most likely to see unconditional offer increases

Compared to 2014, many constituencies in the Midlands saw a **20%** increase in the likelihood of receiving an unconditional offer.
Offer-making behaviour
Offer-making behaviour
Unconditional offer-making and applicants

- **Unconditional offers** have increased again in 2017 – 5% of offers to 18 year olds.
- 18% of 18 year old applicants received at least one unconditional offer in 2017.
- Unconditional offers may affect attainment – 32% of applicants with a **UF** offer miss their grades by **more than three points**, compared to 20% for those with a **CF** offer.
- **UCAS resources** to inform decisions.
Aiming high
Aiming high
Competition for students with lower grades

There was a higher proportion of applicants achieving CCC and below being accepted at a medium tariff provider instead of a lower tariff provider in 2017, compared to 2016.
Higher tariff providers offer to a range of predicted grades

Last year, applicants who had predicted A levels equivalent to **BBC and above** had a **50% offer rate** from higher tariff providers.
What’s important to applicants in decision-making?

Our student decisions survey gives us a wealth of information about what’s really important and influential in decision-making, and how this varies by provider.

Enables providers to understand what applicants want from them and think of them, compared to the competition.
Third year students see the value of HE

82% agree they have gained skills making them equipped to enter the workplace.

85% agree they have more options open to them.

76% agree they will have a more fulfilling career.

72% agree they can pursue their chosen career path.
Our current and future offer to teachers and advisers
Our current and future offer to teachers and advisers
## Products and services for teachers and advisers

<table>
<thead>
<tr>
<th>Apply for Advisers</th>
<th>Adviser Track</th>
<th>Progression Reports</th>
<th>Future products and services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitor, check, attach a reference, approve, and submit applications on behalf of students.</td>
<td>Track offers and decisions made by universities (updated every 24 hrs).</td>
<td>Monitor, check, attach a reference, approve, and submit applications on behalf of students.</td>
<td>Adviser and agent portal (replacing Apply for Advisers and Adviser Track) Monitor, check, attach a reference, approve, and submit applications on behalf of students.</td>
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<tr>
<td><strong>Applicant Status Reports</strong></td>
<td><strong>Final Destination Reports</strong></td>
<td><strong>Competitor Reports</strong></td>
<td><strong>Functionality</strong></td>
</tr>
<tr>
<td>Snapshot listing all your students, their choice of universities and colleges, their offers and replies – available twice weekly.</td>
<td>Confirmation of your students’ destinations, available annually at the end of the cycle.</td>
<td>Annual report, allowing you to compare your destination data with your choice of ‘competitor’ schools.</td>
<td>• Real-time data on your students’ offers and decisions notifications.</td>
</tr>
<tr>
<td><strong>Progression Reports</strong></td>
<td></td>
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<td>• Complete oversight of your students’ applications.</td>
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<tr>
<td>Monitor, check, attach a reference, approve, and submit applications on behalf of students.</td>
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<td>• Timely reports and access to data on your students.</td>
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<tr>
<td></td>
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<td>• Enhanced reference function.</td>
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<td>• Continued enhancement of data reports on your centre, with our Competitor and Progression Reports.</td>
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<tr>
<td>Subscription</td>
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<td><strong>Feedback</strong></td>
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<td>• Test and demo environment.</td>
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<td>• Online/practical workshop sessions.</td>
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<td>• ‘Development of our services’ tile on ucas.com/advisers.</td>
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Informing students
Our strategy, Future Focus

- Undergraduate: strategy to improve pre-applicant opt-in.
- Increase in traffic to apprenticeships offer, plus exploring admissions offer with higher education providers.
- Clearly articulate and develop international student and adviser offer, including partnership opportunities.
- Work for DfE to make changes to teacher training applications, but ongoing conversations about medium-term support.
- Business development for UCAS Postgraduate.
- Communicated our decision to transition out of the choices at 16 market.
Future Focus – Generation Alpha

- Those born after 2010
- Search, admissions and artificial intelligence
- Information and Advice, open days and virtual reality
- Classroom avatars
- Lifelong learning account
- Attitudes to privacy
How we will work with you

Customer-focused

Collaborative

Accountable

Service excellence

Trusted
Questions