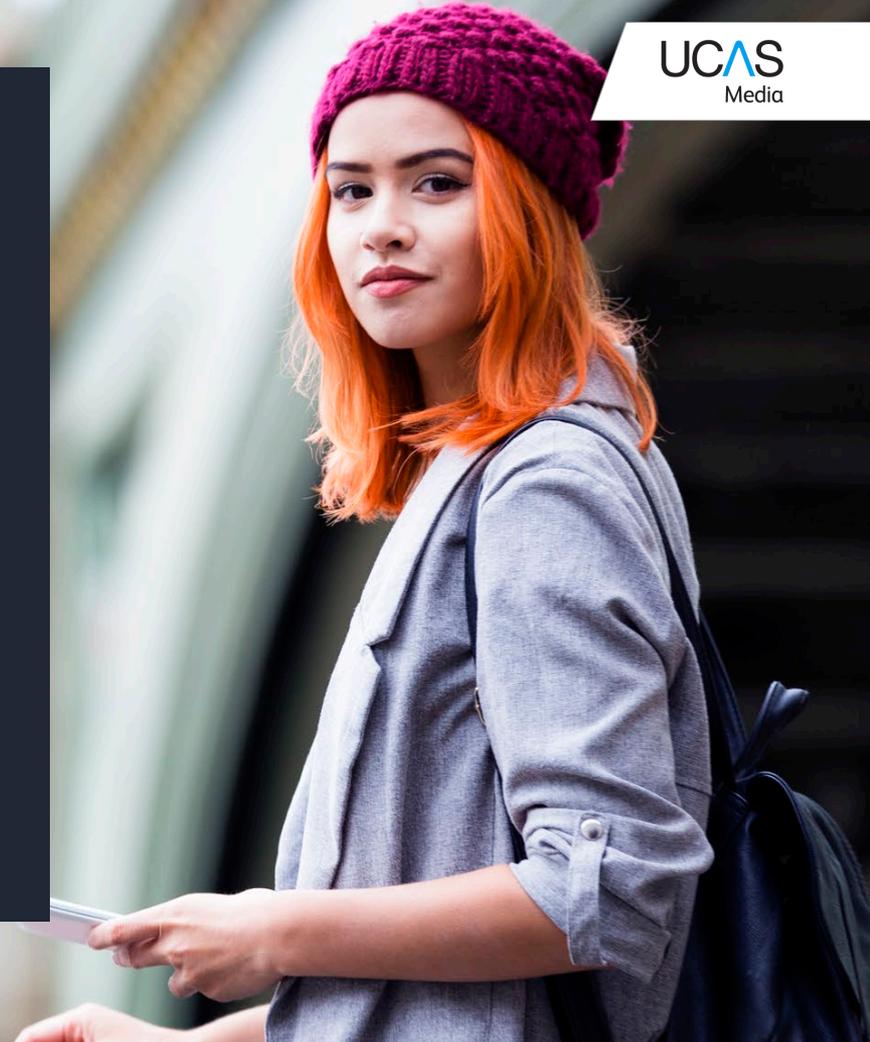


FEBRUARY 2022

UCAS MEDIA INSIGHT NEWSLETTER



Welcome to the UCAS Media Insight Newsletter – February 2022.

It's late February. Pre-applicants are well into research-mode by this time of year and are gearing themselves up to start their national tours of exhibitions and open days. But for applicants, it's offer time – as some universities and colleges start sending out their letters in the battle to engage as soon as possible.

This month gives us two mammoth sources of insight to explore: the Clearing Survey Report (a glimpse into the mindset of last year's Clearing applicants) and Cycle Applicant Figures (a milestone to measure the year-on-year changes in overall applications.)

Today we're focusing on the positive headlines from both sources – there are plenty, and they couldn't have come at a better time.

Let's get stuck in.

What are students doing?

On ucas.com

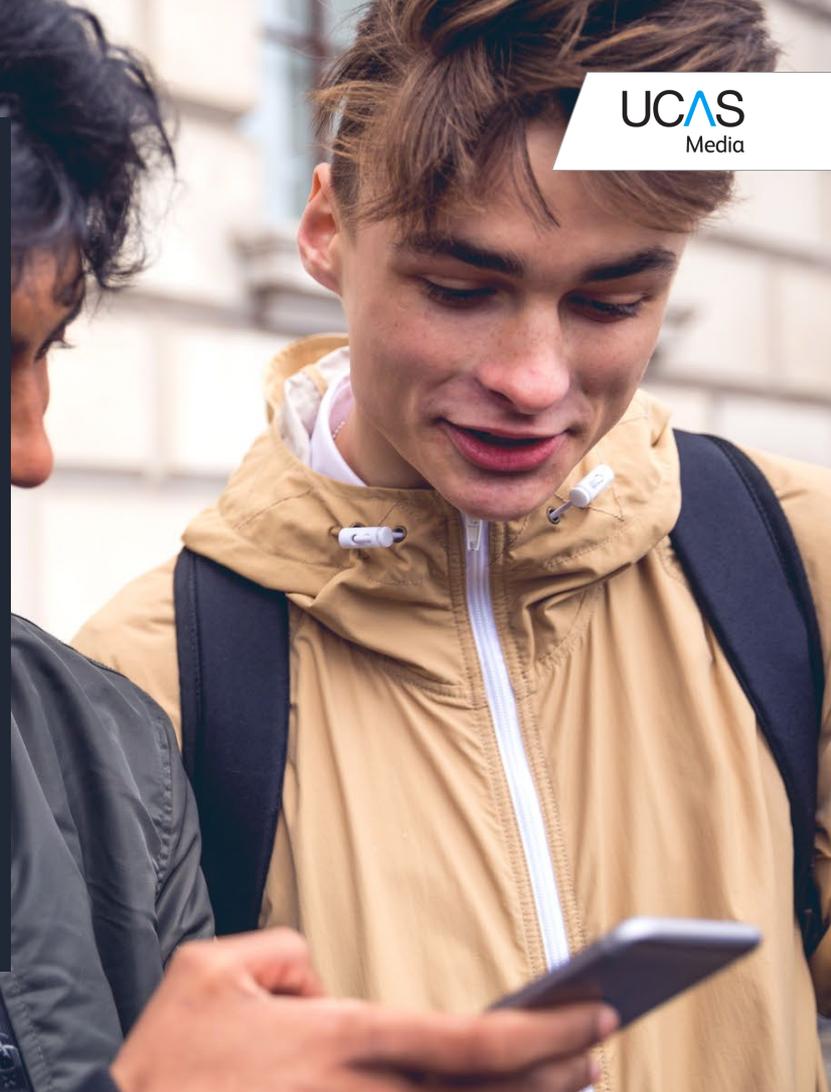
WHO'S ENGAGING WITH UCAS?

TOP SEARCHED FOR SUBJECTS ON UCAS SEARCH IN JANUARY 2022

Position for
January 2022

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

▲
Change in
position since
January 2021



WHO'S ENGAGING WITH UCAS?

UCAS.COM USERS: TOP 10 NON-UK COUNTRIES IN JANUARY 2022



Position for
January 2022

▲ ¹	1	India
▼ ¹	2	United States
▲ ¹	3	China
▼ ¹	4	Ireland
▲ ²	5	Nigeria
▼ ¹	6	Hong Kong
▲ ¹	7	France
▼ ²	8	Pakistan
=	9	United Arab Emirates
=	10	Spain

▲
Change in
position since
January 2021

WHO'S ENGAGING WITH UCAS?

UCAS.COM USERS: TOP 10 UK CITIES IN JANUARY 2022



Position for
January 2022

=	1	London
▲ ¹³	2	Croydon
▼ ¹	3	Birmingham
=	4	Manchester
▼ ²	5	Glasgow
=	6	Leeds
▲ ⁷	7	Belfast
▼ ¹	8	Liverpool
=	9	Edinburgh
▼ ⁵	10	Bristol

▲
Change in position
since January 2021

POSTCODE DISTRICT MAP



WHO'S ENGAGING WITH UCAS?

TOP UG PAGES ON UCAS.COM IN JANUARY 2022

Position for
January 2022

▲ ²	1	Applying to university
=	2	How to write a personal statement
▼ ²	3	Tracking your UCAS application
▲ ³	4	Filling in your UCAS undergraduate application
▼ ¹	5	UCAS undergraduate: When to apply

▲
Change in
position since
January 2021

2022 cycle applicant figures

Headlines from the 2022 26 January deadline

2022 CYCLE APPLICANT FIGURES

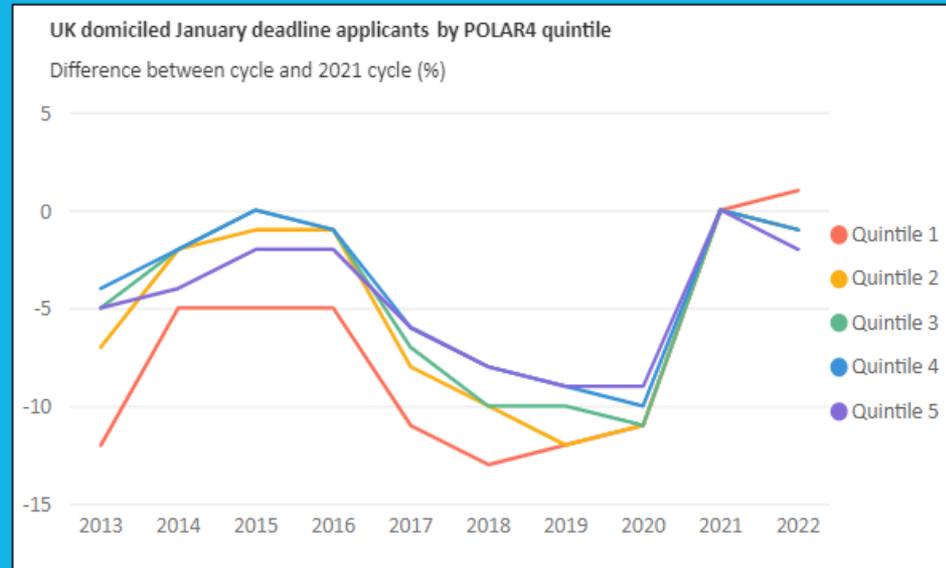
KEY HEADLINES

- **28%** of young people from the **most disadvantaged areas** (quintile 1 using the POLAR4 measure) have applied – **up from 17.8%** nine years ago in 2013.
- The January deadline saw the overall number of **UK 18 year olds applying increase** by 5% (from 306,200 to 320,420)
- **Mature applicants declined** by 17% compared to 2021, when at the height of the pandemic, mature applications jumped in one year by 24%.
- **Overall applications** for full-time undergraduate applications for university and college courses that start this coming autumn **fell** slightly by **1%** (610,720 in 2022 vs 616,360 2021).
- Demand from **China** and **India** surged ahead, with the number of applicants from India almost doubling in the last two years.

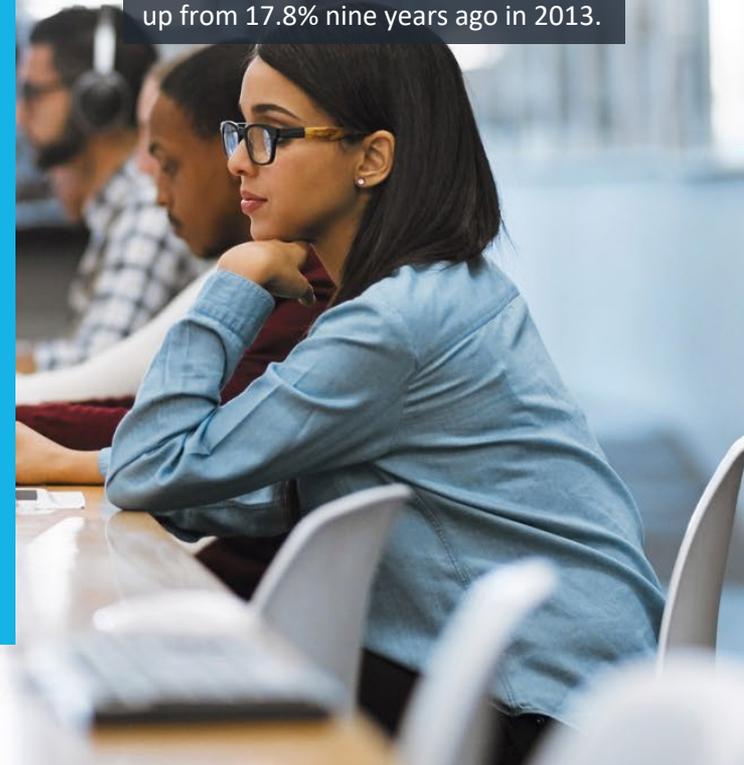


2022 CYCLE APPLICANT FIGURES

JANUARY DEADLINE APPLICANT % CHANGE BY POLAR4 QUINTILE:
UK domiciled applicants



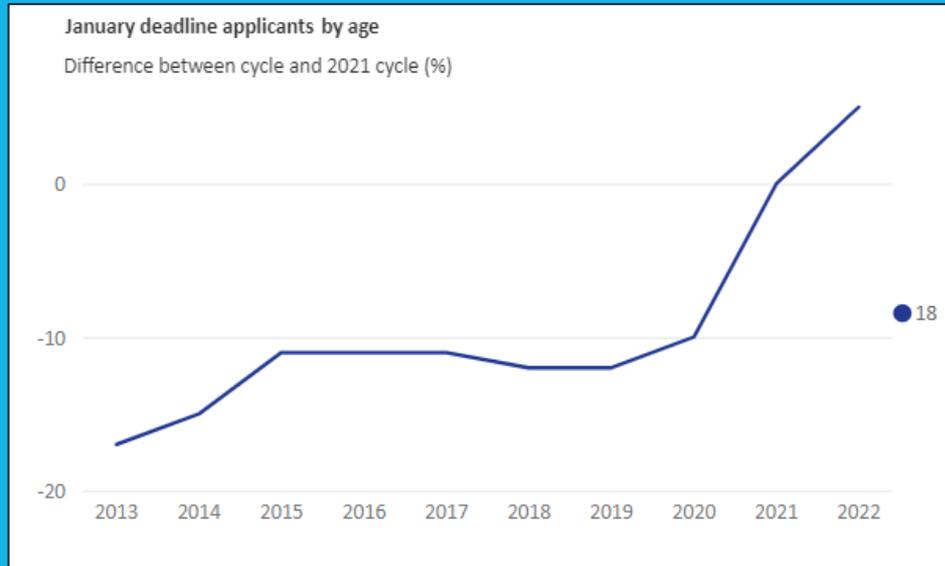
28% of young people from the most disadvantaged areas (quintile 1 using the POLAR4 measure) have applied – up from 17.8% nine years ago in 2013.



2022 CYCLE APPLICANT FIGURES

JANUARY DEADLINE APPLICANT % CHANGE BY AGE:

UK domiciled 18 year olds



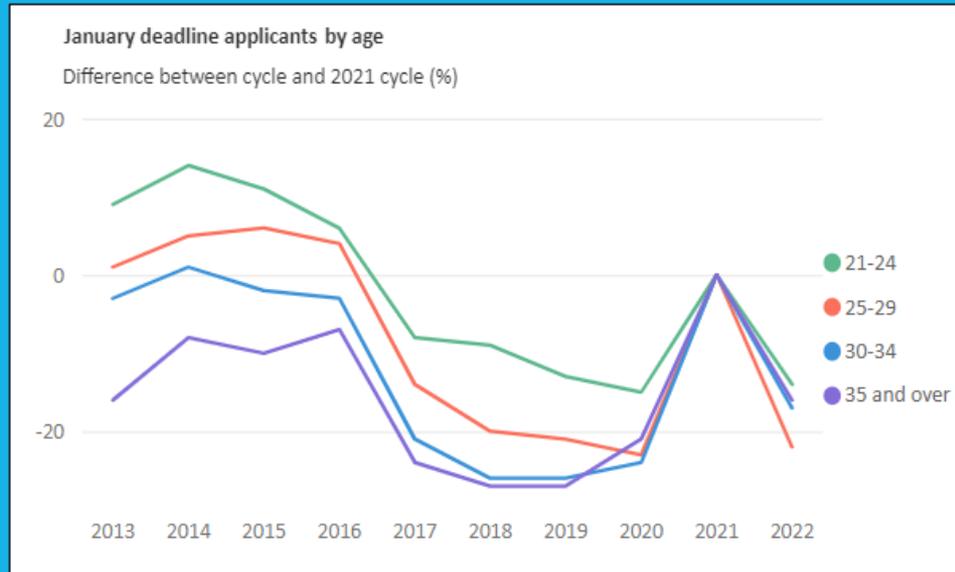
The January deadline saw the overall number of **UK 18 year olds** applying **increase** by 5% (from 306,200 to 320,420)...



2022 CYCLE APPLICANT FIGURES

JANUARY DEADLINE APPLICANT % CHANGE BY AGE:

UK domiciled applicants aged 21 and over

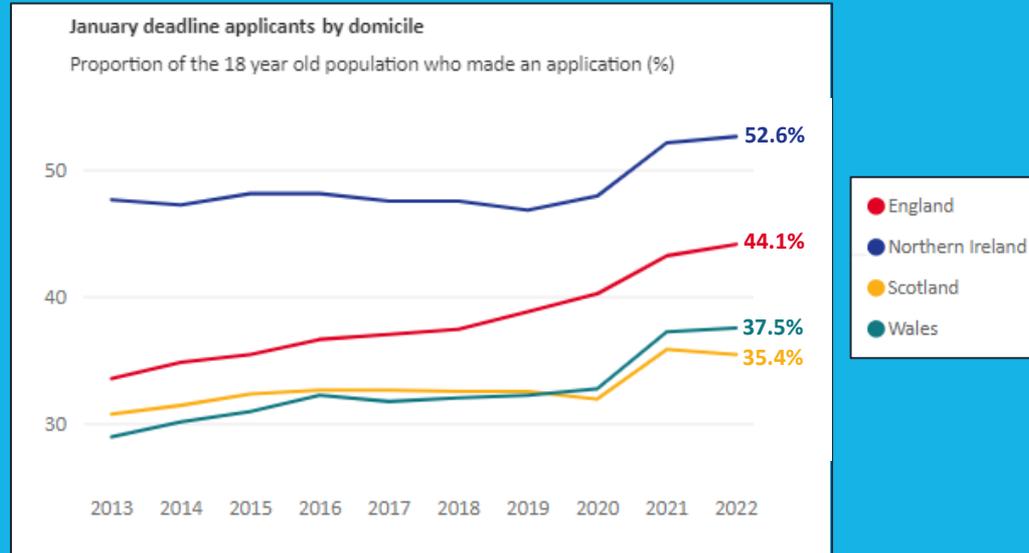


...but **mature applicants declined** by 17% compared to 2021, when at the height of the pandemic, mature applications jumped in one year by 24%.

Overall applications for full-time undergraduate applications for university and college courses that start this coming autumn fell slightly by 1% (610,720 in 2022 vs 616,360 2021).

2022 CYCLE APPLICANT FIGURES

JANUARY DEADLINE 18 YEAR OLD APPLICATION RATE BY DOMICILE:
UK domiciled applicants



Our figures show record application rates for 18 year olds in three of the four nations:

- 44.1% in England
- 37.5% in Wales
- 52.6% in Northern Ireland

With an application rate of 35.4% in Scotland representing the second highest from last year's record high.

2022 CYCLE APPLICANT FIGURES

RESULTS BY DOMICILE

- Applications from **China** grew by **12.1%** to 28,930 applicants.
- Applications from **India** grew by **11%** year-on-year to 8,660 applicants.
- **Nigeria**, a priority country in the International Education Strategy, continues to be an emerging market showing **huge growth**, 47% up year-on-year at 2,380 from 1,620 in 2021.
- **Ireland** continues to buck the downward trend in applications from the EU, with 5,100 applicants, **up from 4,850** in 2021 and 3,850 in 2020.

Applications by top 5 non-EU countries

28,930	China
8,660	India
6,010	Hong Kong
5,280	United States of America
3,390	Singapore

Applications by top 5 EU countries

5,100	Ireland
2,700	France
2,130	Spain
1,610	Italy
1,570	Germany

Rising applications from the UK's most disadvantaged areas.

More than a quarter of all young people in the most disadvantaged UK postcodes applied for higher education this year, an increase of **+17.8% over the past 9 years**. We're tantalisingly close to the very welcome headline of **+20% in 10 years**, should the trend and hard work continue.

Whilst applications from England are the greatest consistent progress, Northern Ireland is seeing the most dramatic peak and has also broken its overall application record this year, tipping over that halfway point where **52.6% of all 18 year olds** are now applying for higher education.

Globally, UK higher education is also attracting greater numbers of learners from underdeveloped nations. Applications from **India increased by 11%** year-on-year whilst **Nigeria's**, one of the International Education Strategy's priority countries, **rose by 47%**.

It would be remiss to attribute all of this growth to the impact of the pandemic, many of these trends have been the result of slow and deliberate progress. Universities work tirelessly to engage with disadvantaged communities in order to widen participation in higher education (whether that's in the UK or overseas.)

But with so much evidential change happening in the industry, we also can't ignore the influence of 3 years of COVID-19. **A slower pace of life, a rare moment to consider, and a greater appreciation of what matters most** will all have influenced the behaviours of young people across the world.

We're seeing growth in applications where forecasters once expected shrinkage, and more engagement from poorer areas, in the midst of greater economic struggles.



2022 CYCLE APPLICANT FIGURES

EXPLORE THE DATA FURTHER

Our detailed sector-level data resources for the 2022 26 January application deadline can be explored in our [interactive dashboard](#).





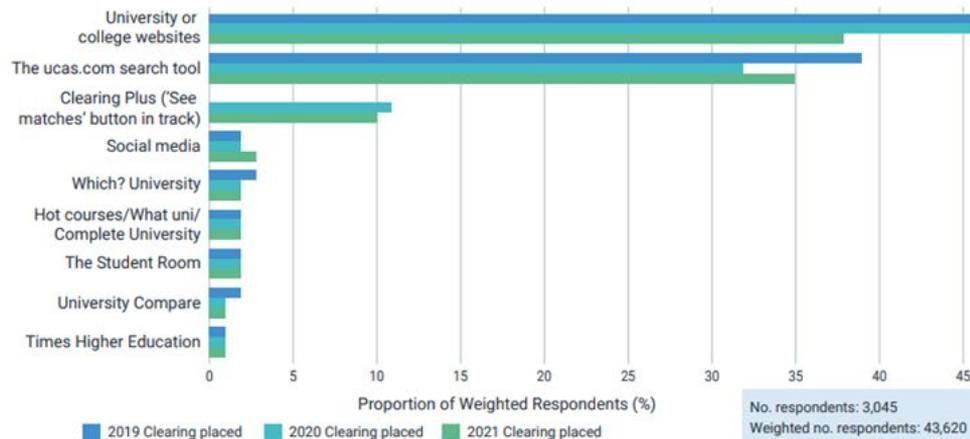
Inside the mindset of 2021 Clearing applicants

Snippets from our [Clearing survey report](#)



**How those using Clearing
found what they needed,
and how it found them**

Going direct to university or college websites and ucas.com were the 'go to' sources to search for places in Clearing



When you were looking for a place in Clearing, where did you search for places?

- ▶ University or college websites were consistently the most cited sources when looking for places – **46%** for 2019 and 2020, and **38%** in 2021
- ▶ Second was the ucas.com search tool at **35%** in 2021
 - And Clearing Plus (option added in 2020) at **10%**
- ▶ Other sources had much lower percentages, including the following at **2%** each
 - Which? University, Hotcourses/Whatuni/Complete University Guide and The Student Room

The ucas.com search tool was the 2nd highest 'go-to' after university/college websites, followed by Clearing Plus



KEY INSIGHTS



More applicants were going 'direct' for information and around a third knew nothing about the university they secured a place at through Clearing

They both **actively searched** and **passively discovered** what they needed

- ▶ Their most **cited sources of hearing** about Clearing places were word of mouth and then the UCAS website

When they were **looking for a place**, university and college websites, the [ucas.com](#) search tool and Clearing Plus were go-to destinations

Going 'direct' meant a range of things to them, potentially inspired by filling gaps in information about a university quickly

- ▶ Speaking to a person
- ▶ Speaking to the university
- ▶ Speaking to UCAS
- ▶ There was an **increase in those who had contacted universities by phone**

When they were on their digital travels on social media, they tripped over advertisements from universities there, rather than using it as a place to search for Clearing places



The factors which were important to applicants when choosing their place in Clearing

After the university offering the course they wanted, teaching was critical and had increased in importance

When asked about factors relating to the university and the course, factors relating to teaching had increased in importance (very important/important)

'Quality of staff/teaching'

86%  **92%**
2020 2021

Interestingly the most significant shift was an increase in the importance of the TEF rating

'TEF rating'

52%  **71%**
2020 2021

'Quality of teaching facilities'

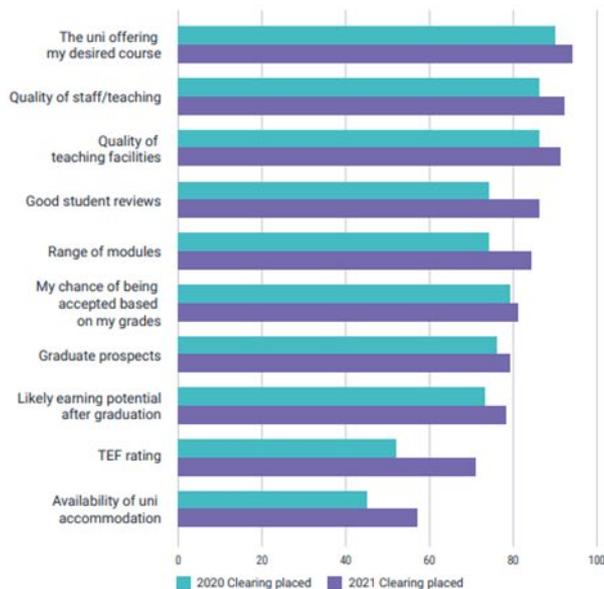
86%  **91%**
2020 2021

Range of modules had also increased in importance

'Good student reviews'

74%  **86%**
2020 2021

74%  **84%**
2020 2021



How important were the following factors when choosing your place in Clearing?

Very important + Important

Top 10 responses in 2021 & year-on-year results

Factors relating to teaching had increased in importance



57%

cited availability of accommodation as important or very important (up 12% from 2020)

KEY INSIGHTS



No doubt impacted by the unpredictability of COVID, support, proximity to home and teaching quality were becoming more important for some

This won't be the case for everyone, but for some there seemed to be a shift in consideration factors towards **exploring options closer to home, but not necessarily at home**

They appeared to be interested in **needs around support**, and knowing what would be available to them if they were away from home

This cohort have had a **disrupted education** for the last two years and

- ▶ Have not been able to take access to teachers for granted
- ▶ Their teachers had to translate in-person lesson plans into online content quickly

Factors around **teaching and teaching quality** at university had increased in importance

Students of 2022 want more from their universities and colleges.

When we spoke to Clearing 2021 students, comparing their experiences with their 2020 predecessors, **every single decision-making factor became more important** this year.

And the disparate nature of many factors (we tracked everything from teaching standards to accommodation provided) suggests that **students want higher overall standards** and **more information to make their decisions**.

For many young people, the pandemic will have been one of the quietest periods of their lives – and as such their greatest chance to reflect and consider their next move. Their experience of sixth form and college was interrupted, and that's something that many of them don't want to repeat at university.

So they are now **demanding more** and are **happy to shop around** until they find it – more clarity on acceptances, more data on graduate prospects, more guarantees that this is the right provider for them.

For the marketing and admissions departments ready to react, this represents a **great opportunity** to meet the needs of an active market.

What does this mean?

Besides the obvious need to have strong messages in the most important areas, **it's the provision of information that will win students over**. Being able to easily find those trust markers (like reviews, like TEF rating, like modules lists) will mean a positive user experience for your potential students. Failing to include these decision-making factors in your marketing messages, or making them difficult to find on your website, means frustrated potential applicants. Never a good start to a relationship.

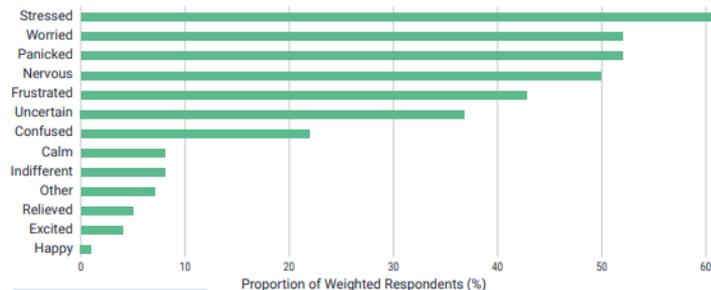




How do applicants feel when they go into Clearing, who do they go to for help, and how best can we communicate with them?

Needing a place in Clearing had a **significant emotional impact**, so recognising the words applicants use is important

- ▶ At this point they felt stressed, worried, panicked, nervous, frustrated, uncertain, and to a lesser extent confused
- ▶ What they didn't particularly feel was calm, indifferent, relieved, excited, or happy
- ▶ To get their attention so that they you can support and signpost them to the information and opportunities they need, show them you understand and empathise with how they are feeling



No. respondents: 678
Weighted no. respondents: 10,717

Which of the following emotions, if any, do you remember feeling the moment you realised you needed to find a place in Clearing? Please select all that apply.

What they wanted from universities and colleges was a **rock solid process and facts to calm and reassure**

- ▶ When asked how they wanted universities and colleges to **communicate with them** when they were searching for a place in Clearing
 - 63% said they wanted them to 'Talk me through the process **step by step**'
 - 60% said 'Give me the facts'
 - A third wanted universities to 'Reassure me that their university was right for me'
 - And 23% said 'Calm me down'
- ▶ At a time of high stress, it's easy to forget or lose confidence in things that you thought you knew
 - So, communications need to be calm, clear and enabling

Show them that you understand and empathise with how they are feeling



KEY INSIGHTS



To help applicants get what they need, use the language they need to hear

- ▶ Deciding to go into Clearing, or needing a place in Clearing, had a **huge emotional impact**
- ▶ Even before COVID this was a stressful time, and when needing emotional support **parents tended to be a first place to go**
- ▶ For this COVID cohort, concern about results is likely to have been exacerbated, and they are **checking out Clearing options earlier**
- ▶ Help them trip over **clear and simple information** about the **Clearing process** which will help them secure a place – a firm deadline can be reassuring



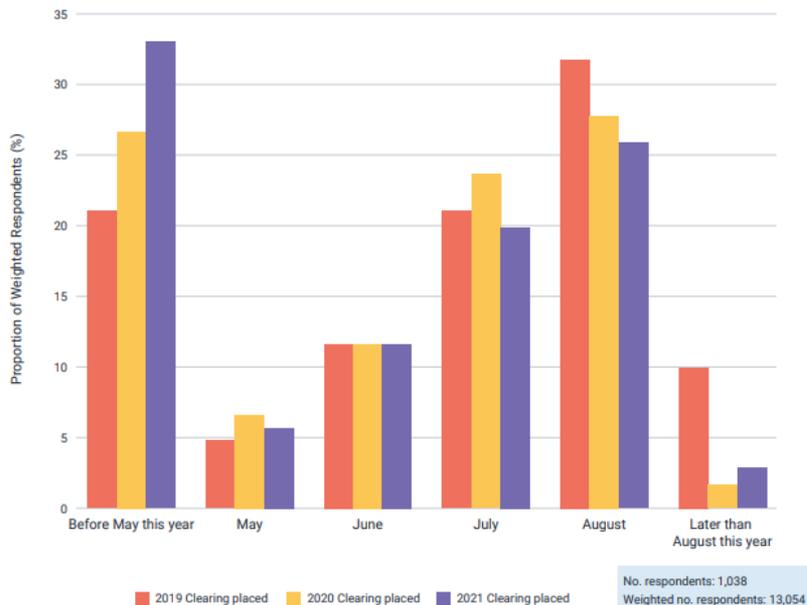
There were some interesting changes for those who applied **direct to Clearing, or released themselves into **Clearing****

For those who applied direct to Clearing in 2021, they were more likely to know that they were going to do it

- ▶ When asked if they had **always planned to apply directly to Clearing**, respondents in 2021 were more likely to say yes

25%  **27%**  **31%**
2019 2020 2021

- ▶ They were more likely to know they were going to apply to university **before May**, and then applied directly to Clearing
 - And less likely to have decided to apply to university in August, than in previous years



You told us you applied directly to Clearing. When did you decide you wanted to apply to university or college?

KEY INSIGHTS



2021 applicants were considering Clearing earlier in the cycle

Applicants were increasingly likely to consider **changing their minds earlier in the cycle** and while waiting for their results

- ▶ With May to July increasing in importance, at the expense of August

Although 2020 and 2021 were not 'typical' years in terms of exams or applications to university

- ▶ These shifts may become embedded, as those going through the education system for many years to come will have been impacted by COVID

So, it's even more important to **keep in touch between May and August** with those holding offers

And **staying top of mind** for those who may be considering or needing Clearing is even more critical



And finally, when we asked
“If you could give one
piece of advice to a student
looking for a place through
Clearing in future, what
would it be?”

40% said to do plenty of research before results – into courses and universities, accommodation, finances and student societies

"Take the time to look through your options – the balance is different in Clearing, as universities are looking to fill places, so you have more leverage. Don't jump on the first offer you get"

"Find a university that does the course you're interested in and research it till you can't anymore. Try and obtain as much information as possible"

"Research! Look at the university's website, social media pages, prospectus. Find out as much as you can about them – don't be tempted to accept an offer without researching that it's right for YOU"

24% promoted strong self belief and trusting in instincts, and optimism

"Know that there will be something that suits your needs and your personal situation"

"Any opportunity is better than nothing – it could turn out to be the best decision of your life"

"Don't give up on your dreams just because you don't get your first choice uni"

Often comments combined emotive advice and self belief

"Be hopeful and be patient. There is a university out there that has a course that you'll enjoy and if not this year, there's nothing wrong with a gap year for the time being"

"Do not stress, there is a place for you somewhere. You will be where you are meant to be"

"Don't be worried if you don't receive a place, there's always an alternative route"

19% said to trust and be confident in UCAS and universities, because Clearing works so 'trust the process'

"Finding a place through Clearing is easy and you will find a course you want to do"

"Don't be afraid or put off by it, the process is easy to complete"

"It is definitely not as complicated as you think it may be"

Although Clearing can be a worrying time, they were so encouraging and 157 comments said 'Just do it!'

"Go for it! Amazing service don't waste time!"

Clearing 2022 – the 3 golden rules of engagement

Clearing 2022 is already fast approaching. And because many students find places at universities or colleges that they're familiar with – or have even already applied to – getting in front of these applicants now can mean all the difference when summer arrives. That leads nicely onto the first of our three golden rules for Clearing 2022:

ENGAGE WITH POTENTIAL APPLICANTS AS EARLY AS POSSIBLE

Once upon a time, Clearing was a results-day-dash – these days it's far more spread out, with more than a third of students choosing the Clearing route before May (+6% in 2 years.)

Be front of mind by consistently speaking to potential applicants between now and August.

MAKE INFORMATION DIRECTLY AVAILABLE AND EASY-TO-FIND

When looking for Clearing places, 45% check UCAS/Clearing Plus, and 38% check university websites. Most other sources are used by 3% of students or less. And when looking for more information about a provider, students want more information than ever before.

Make sure you have the right information – easily navigable – on UCAS, Clearing Plus, and your website.

SPEAK IN A LANGUAGE YOUR MARKET UNDERSTANDS

The experience of Clearing is an emotional one for applicants, even more so this time around during COVID. Their most frequent feelings are stress, worry, panic, and nerves – and they want you to go 'step-by-step' with 'facts' and 'reassurance.'

Show that you are doing more than just providing information. Present it empathetically and address their concerns. Calm them down, win them over.

[Access the full Clearing survey report](#) for further insights.

This year, we have new products and services to help you put your institution in front of students – both leading up to Clearing and during Clearing itself. Find out more at ucas.com/clearing22

So, a few more things for your to-do list then...

2022 presents a unique challenge for higher education providers, simply because the market has never quite been like this. More 18 year old applications than ever, a record-breaking amount of engagement from disadvantaged postcodes, a changing of the guard in what students want from their providers, and a whole new mini cohort made up of Gen Z'ers who have lived through a 3 year pandemic.

Getting up-to-date insight is now more important than ever, along with interpreting it correctly and properly putting it to use. If that's something you'd like our help with, or you need access to more data like this, [get in touch](#).

We'll be back next month, with more insight, from February.

Get in touch

For further information and insights about anything else contact your UCAS Media account manager or email us at ucasmediaeducationteam@ucas.ac.uk.