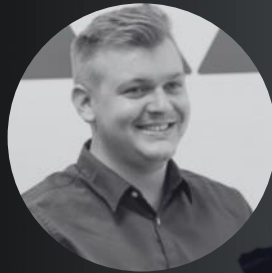


# Savanta: 10 years of student life – how have things changed?



Andreeanne Orsier  
*Director – HE*



Joey Jones  
*Senior Consultant*

savanta.com

make better decisions

# Never start from zero with Savanta's *HE Success Suite*

Sector and competitor benchmarking, providing you with impactful evidence and best practice to elevate your institution's performance and **boost your attraction**.

## Savanta: *HE Success Suite*

 Undergraduate  
Success 

How to attract  
prospective UG  
students

 Postgraduate  
Success 

How to attract  
prospective  
PGT students

 Marcomms  
Success 

How to  
maximise your  
comms appeal

 Open Day  
Success 

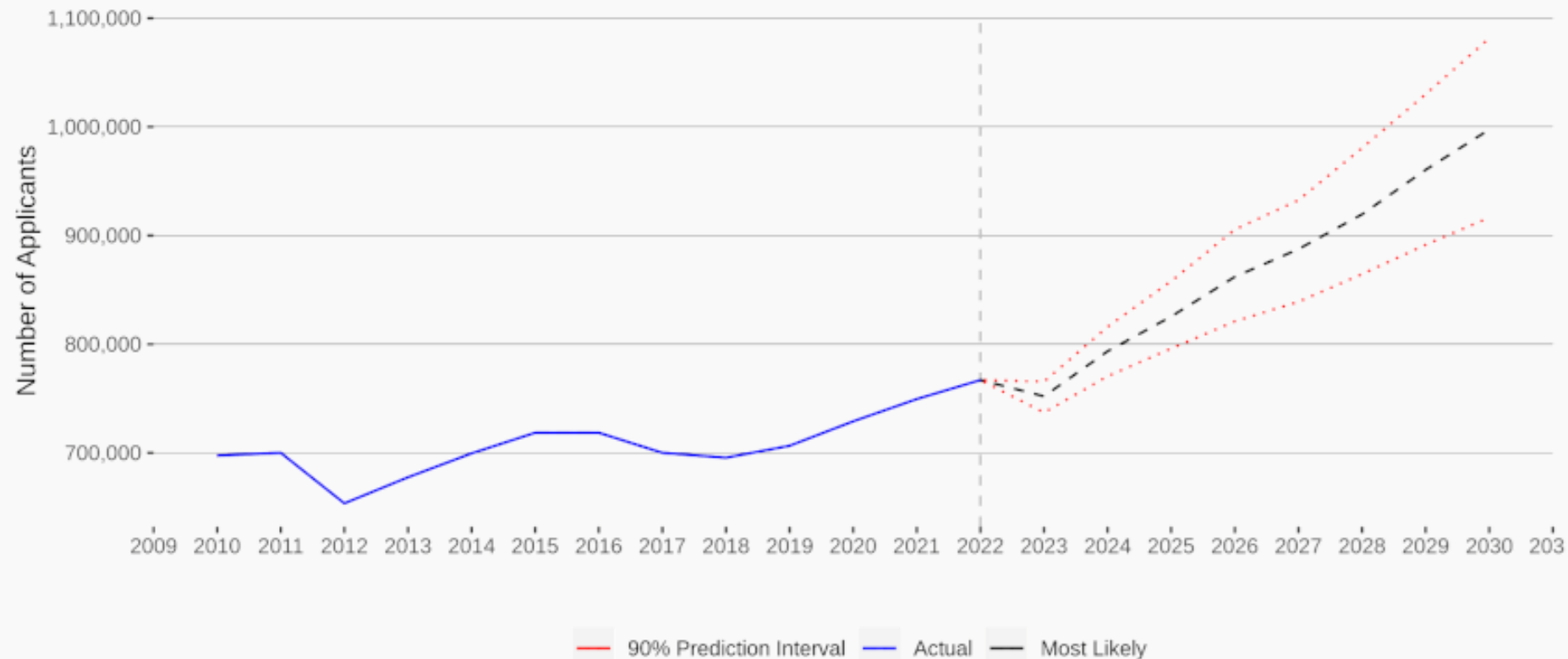
How to drive  
conversion at  
your events

# Demand for HE is forecast to boom, but is the system prepared for this increased demand?

## Actual and forecasted number of all applicants to UK universities

Source: UCAS

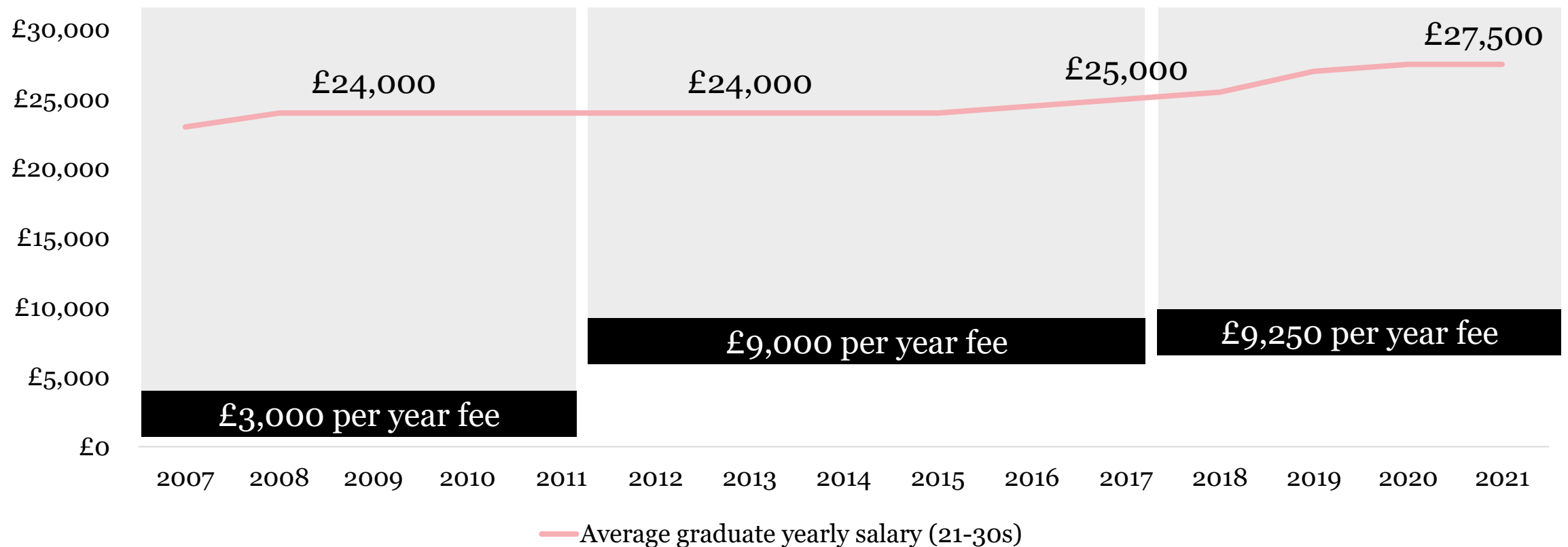
Scale is adjusted to highlight changes over time



# Graduates are paying more for university, but average graduate salaries have not increased by the same rate

## Average graduate yearly salary among those aged 21-30 over time

Source: Government education statistics



# Without the ‘graduate uplift’, what do universities have to offer?

## UNIVERSITY IS LOSING ITS ‘HALO’

The traditional idea that going to university is ‘better’ than the alternatives is on the way out, because...

- Increased financial stakes: repayment terms up to 40 years, payment thresholds lowered
- Heightened pressure to achieve and get a good return out of university – even if that return is diminished
- Alternatives don’t need as much investment (e.g. degree apprenticeships)

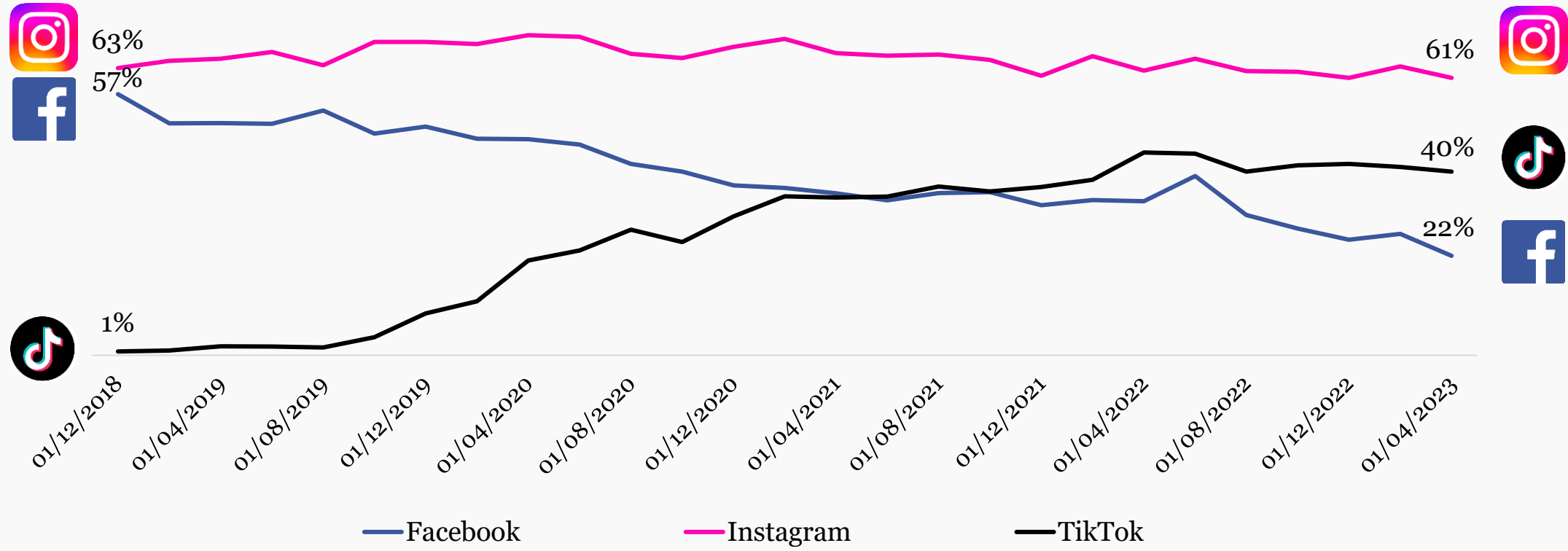


# The social media landscape has shifted rapidly, and Gen Z are engaging with brands through different platforms

## Usage of social media channels (multiple times per day) among Gen Z over time

Source: Savanta's *State of the Youth Nation*

Scale is adjusted to highlight changes over time





# Your website isn't your shop window: social media is

The way people use the internet has changed

- From connecting people, to...
- Connecting people with **brands** (websites), to...
- Connecting people with **experiences** (social media)

Social media informs decision-making

- Reviews for every university can be found
- Social media opens up universities into shop windows – everyone can look into them
- Universities need to be 'window dressing'

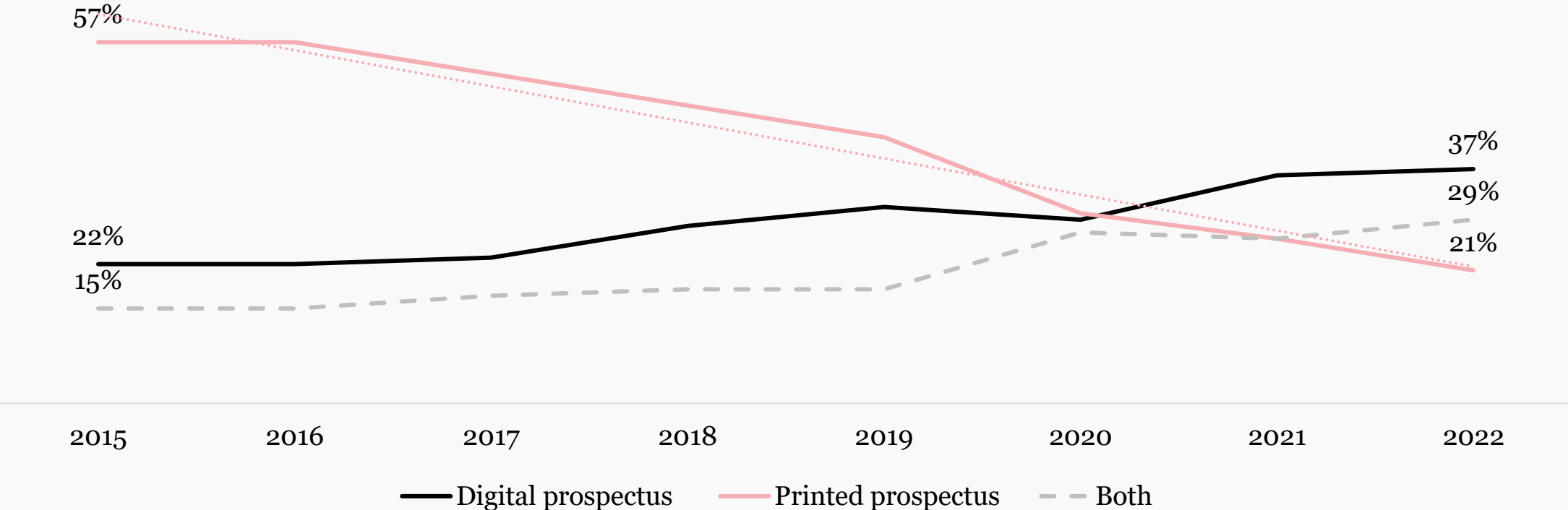


# Is the printed prospectus dead? Prospective students increasingly favour a digital format...

## Prospectus format preference among prospective undergraduates over time

Source: Savanta's *Marcomms Success*

Scale is adjusted to highlight changes over time





# *This is the opportunity to be innovative with the prospectus*

## BENEFITS TO THE DIGITAL PROSPECTUS:

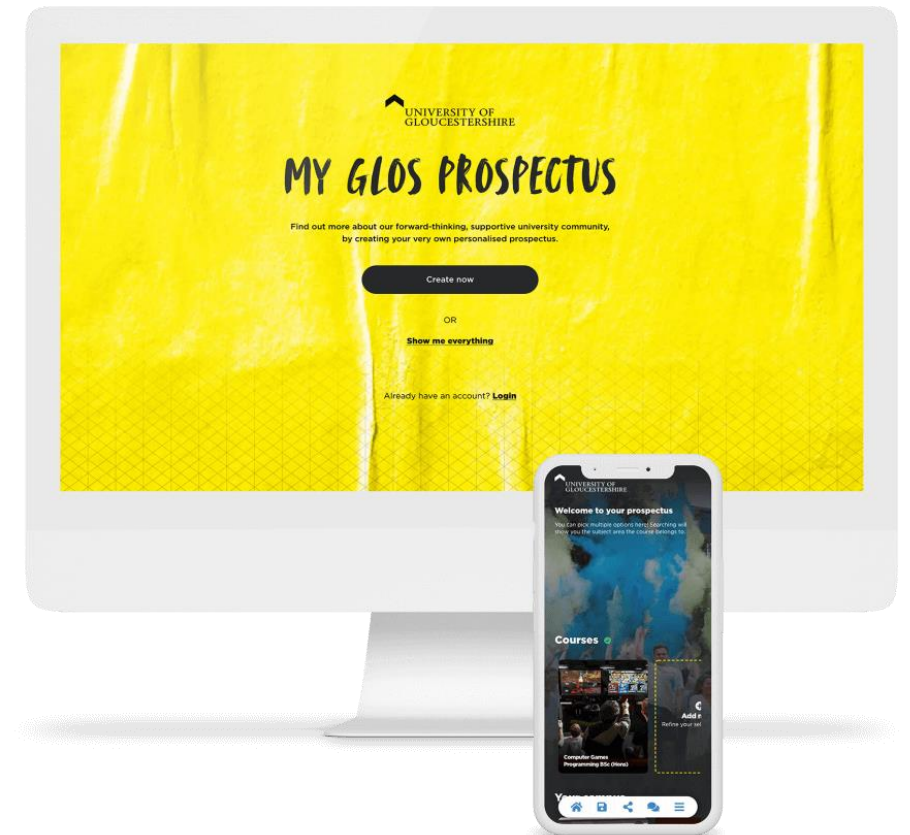
- Immersive way to communicate course details and university experience
- Instant information gratification
- Environmentally sustainable vs. the alternative

## OUR ADVICE:

- Be innovative with the role it plays, not just the information it gives
- Once you know what the role of it is, you should know what the digital prospectus will look like



- Award winning – **Gold award in Best Undergraduate Prospectus (2021 Heist Awards)**

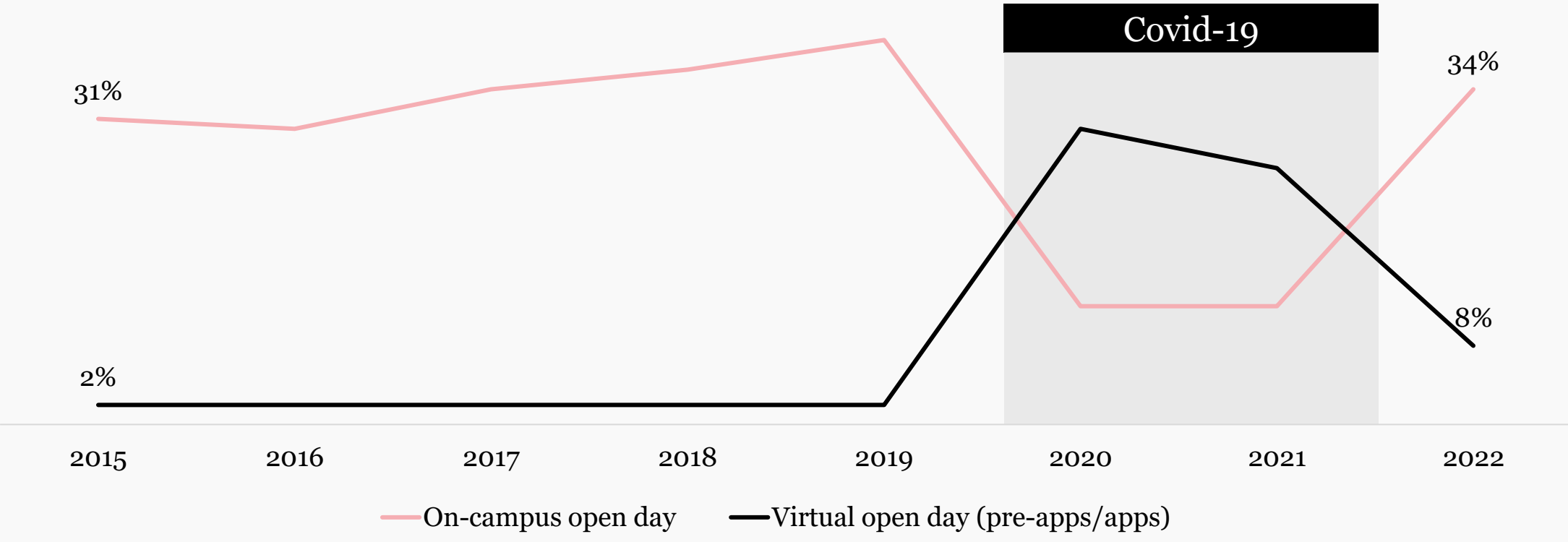


# The pandemic forced universities to adapt quickly, but digital events work differently to on-campus open days

## Extensive open day usage among undergraduate pre-applicants over time

Source: Savanta's *Marcomms Success*

Scale is adjusted to highlight changes over time



# Just because they're both called 'open day' doesn't make them the same

## ON-CAMPUS OPEN DAYS:

- Create **belonging** and **inspiration** – the top drivers of attendee-to-student conversion (Savanta's *Open Day Success*)
- Most influential tool universities have – biggest opportunity to convert (Savanta's *Marcomms Success*)

## DIGITAL OPEN DAYS:

- Can't build a sense of belonging...
- ...But an opportunity to bring best aspects of a university to life – a way to enter a consideration set earlier on
- Passive, low-effort touchpoint (for the audience)

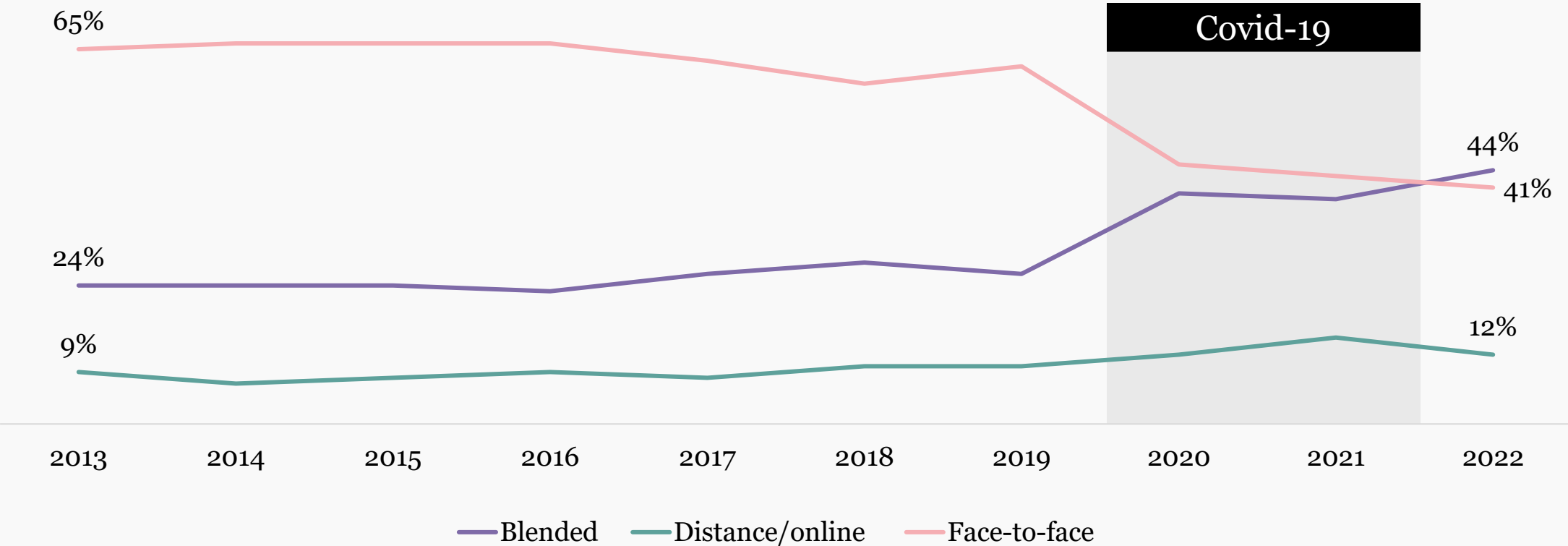


# The time of pure face-to-face delivery is over: many prospective postgraduates now prefer a blended approach

## Preferred course delivery method among postgraduate considerers over time

Source: Savanta's *Postgraduate Success*

Scale is adjusted to highlight changes over time



# What is the true value of the wider university experience?

## REMOTE LEARNING

- Gives students flexibility
- Empowers them to make different choices

## BUT...

- Remote study could become very transactional – students wouldn't be engaging in the wider university experience
- The market thrown open to possibility – could you study remotely from a different city? From a different country?

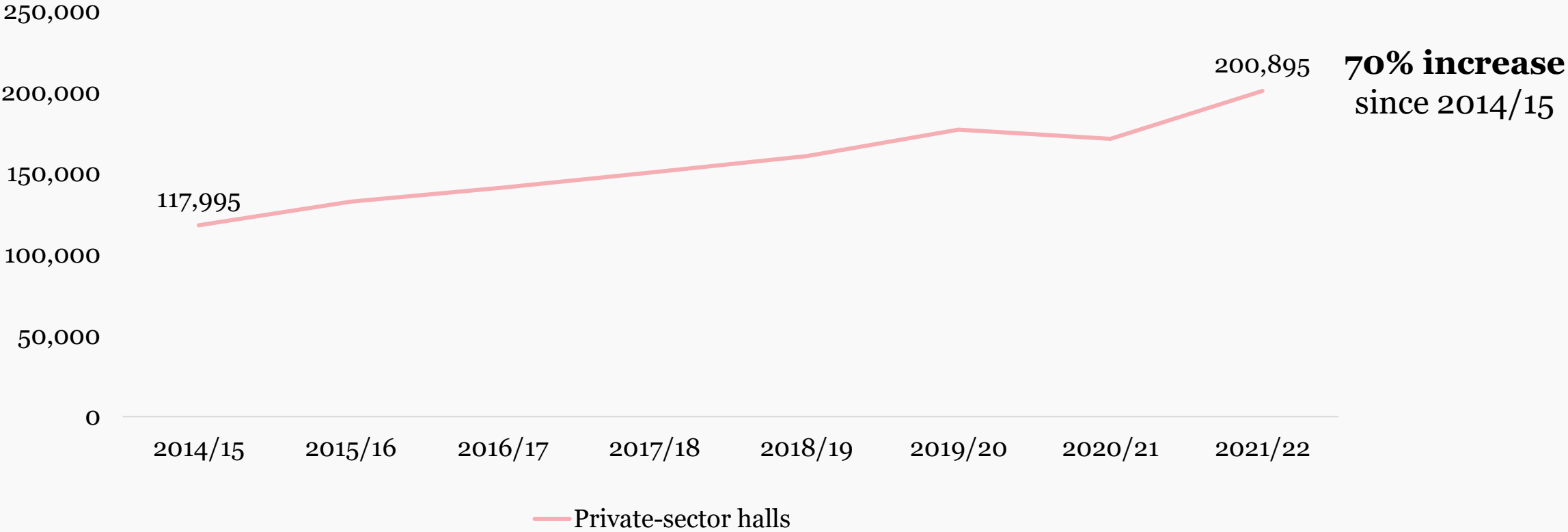




# Accommodation providers have vested interests in how students conduct their studies – and where they are living

## Number of students living in private-sector halls

Source: HESA



# Living independently has never been so expensive...

## FROM GRANTS TO (LARGE) LOANS

- Grants replaced by loans (up to £13k per year) – a huge money-spinner for accommodation providers
- Loans enable students to independently pay for accommodation – making it a more independent decision
- Larger loans drive expectations for better quality accommodation – yet poor-quality accommodation is rife

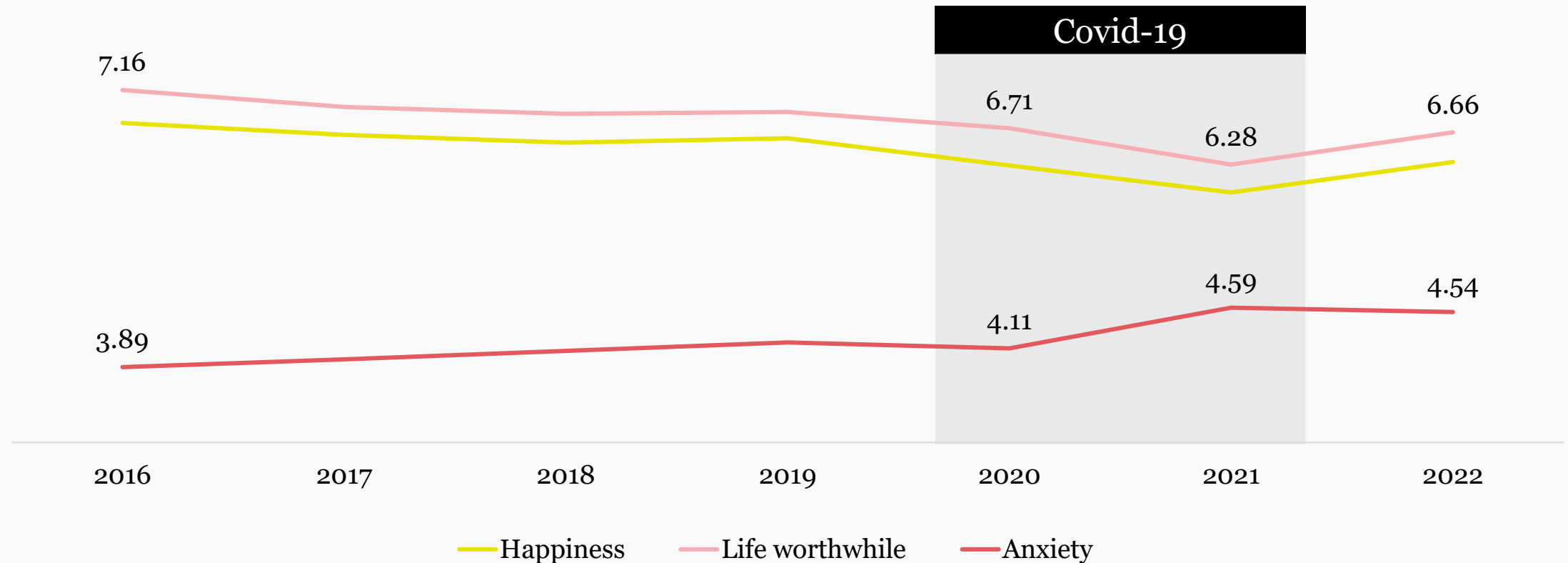


# Students are experiencing a wellbeing crisis: happiness is decreasing and anxiety is increasing

## Student wellbeing measures over time (mean scores)

Source: HEPI / AdvanceHE Student Academic Experience Survey (SAES)

Scale is adjusted to highlight changes over time



# How can your university be part of the solution, rather than a cause?

## SUPPORT, RECRUITMENT, RETENTION

- Higher education is a stressful time in students' lives
- Mental health is the top reason for students dropping out of university, accounting for 34% of all drop-outs (HEPI / Advance HE **Student Academic Experience Survey 2022**)
- Universities need to step in with increased pastoral and medical interventions
- Wellbeing directly impacts recruitment and retention, impeding conversion to higher levels of study

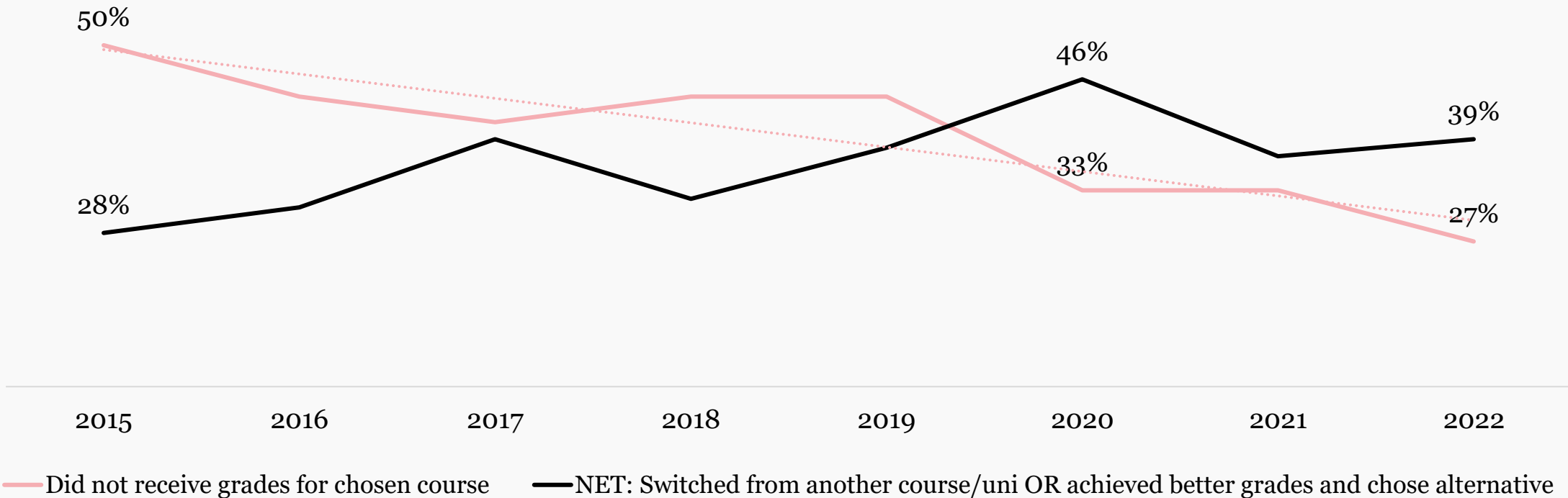


# Clearing-up – applicants are now more likely to go through Clearing to trade-up

## Reasons for entering Clearing among 1<sup>st</sup> year Clearing students over time

Source: Savanta’s *Marcomms Success*

Scale is adjusted to highlight changes over time

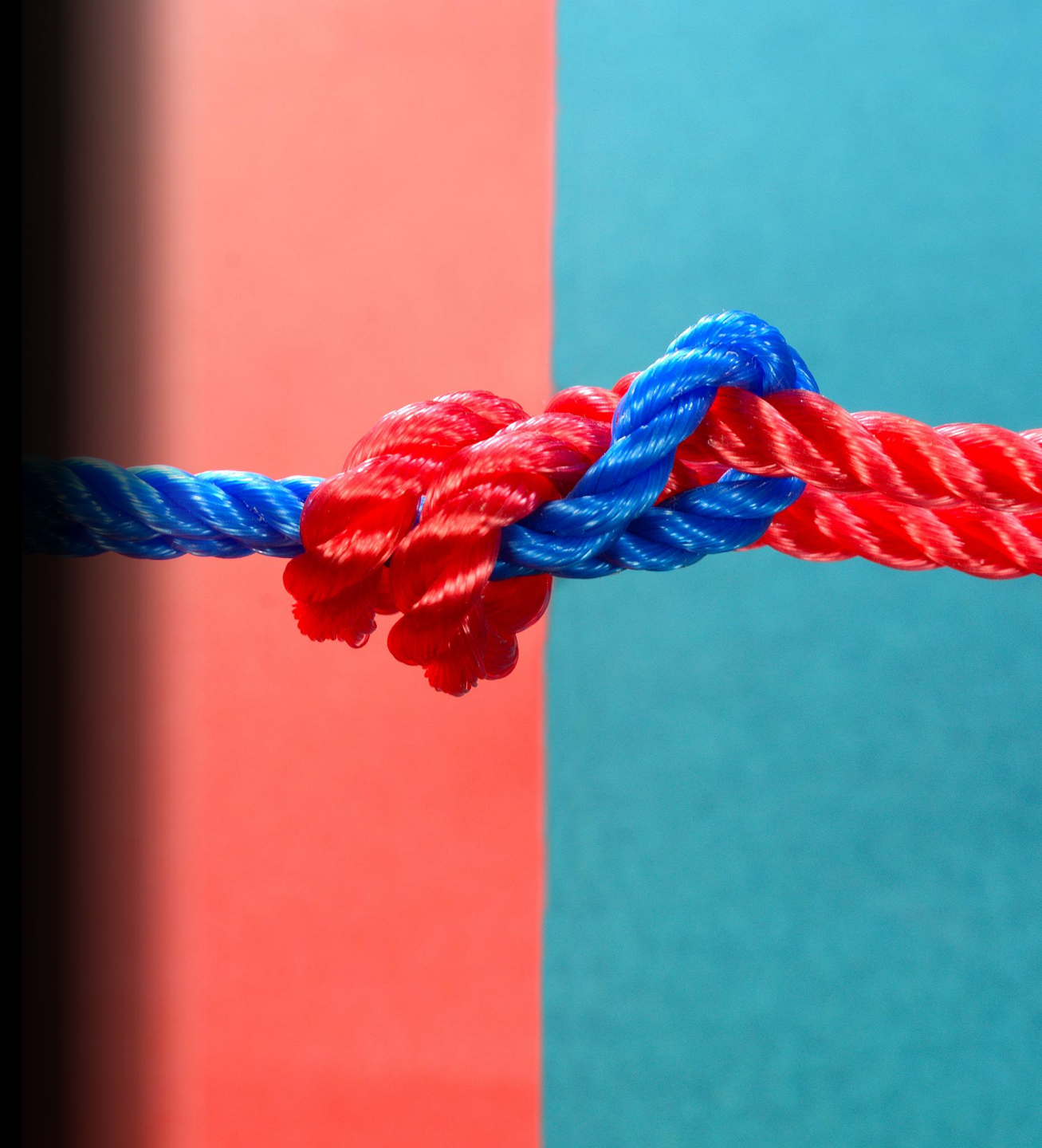




# Clearing strategy now needs to have a dual purpose

## CLEARING: THE REBRAND

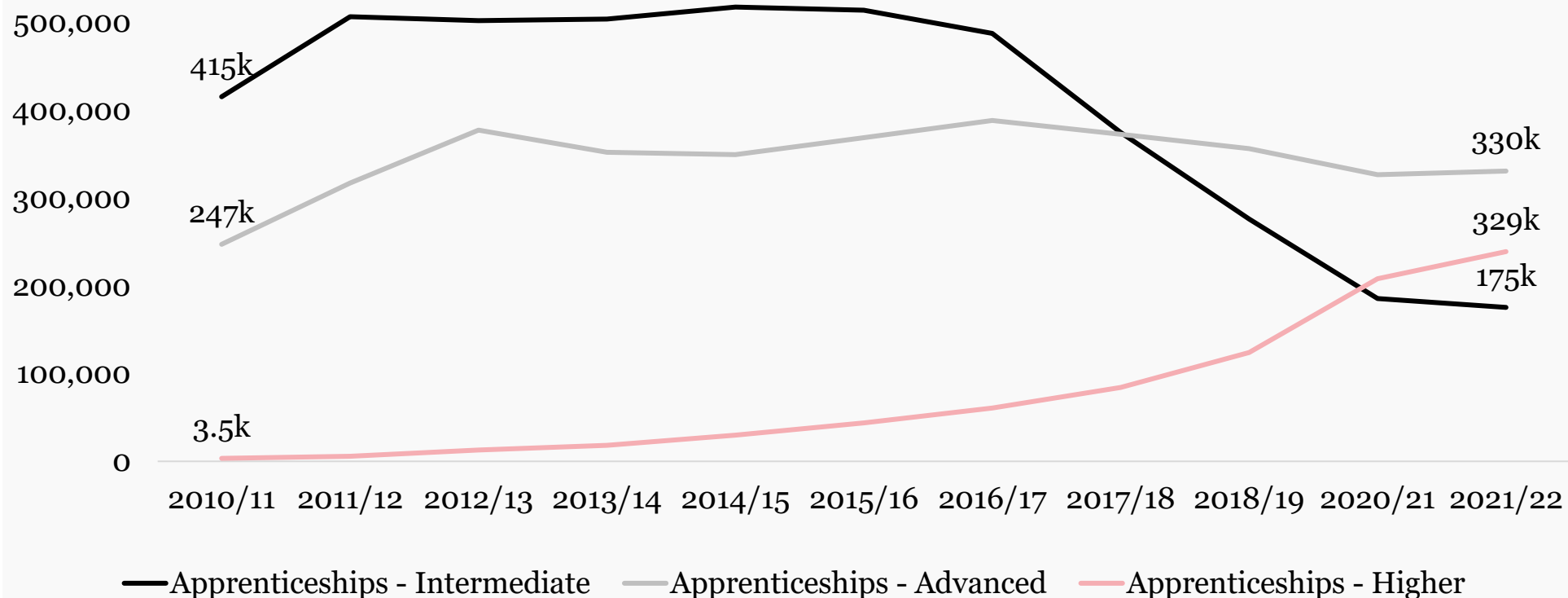
- Evolving from the place you go when you fail to the place you go when you excel
- University Clearing strategy needs to have a dual purpose
- A marketing conundrum: do you target one audience, or the other? Or both?



# Higher-level apprenticeships are expanding – what does this mean for more traditional university pathways?

## Number of UK apprenticeships by broad level over time

Source: Gov.uk statistics



**Degree apprenticeships**  
(Included within 'Higher' figures on the chart)

**39,200**  
in 2020/21



**43,230**  
in 2021/22

# Traditional HE will no longer have a monopoly on degrees

There is demand for university, but tensions in how university will be delivered...

Degree apprenticeships:

- Offer the degree without the ‘university experience’ (the traditional USP of university)
- Pay students to learn on the job – less financial pressure vs. university degrees
- Provide high-level learning in a specific industry – skills and employability
- Will have equal positioning on UCAS website, next to traditional university courses



Looking ahead...  
what questions  
do universities  
need to answer?



What is the **unique selling point** of university?



A **great student experience** is key, but how much of a priority is the student experience to your university?

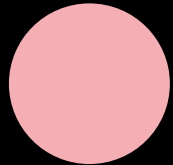


How can your university **support students**?

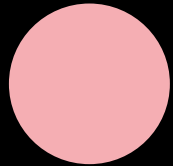


In what ways is your university brand **visible**?

# Thank you!



If you have any queries about the HE Success Suite, or if you'd just like a chat to find out what we can do for your institution, please get in touch.



We would value the opportunity to pitch for your ad hoc research projects.

**HESuccessSuite@Savanta.com**



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