Driving growth in student recruitment in a post-pandemic world

UK Domestic Student Survey 2021

Contents

Introduction to the UK Domestic Student Survey

The coronavirus has had a significant impact on the UK higher education sector. Within a short space of time, universities across the country have had to pivot their teaching practices to incorporate online learning on a scale that few could have foreseen 18 months ago. Not only has their ability to maintain consistently high teaching standards in this period been tested, but they have also had to strengthen the support they provide to their students for their mental wellbeing during this period of lockdowns, social distancing and quarantining. This, combined with the news that there has been a 40% drop in applications from EU students to the UK in 2021 following its departure from the European Union, suggests that the sector will be tested in multiple ways in the coming year. Domestic student cohorts will become increasingly important to universities, but they will also potentially require a greater level of support as they progress through their studies.

Now in its fourth year, the QS UK Domestic Student Survey seeks to enhance the sector's understanding of how prospective students make decisions around their studies. This year we have gathered the responses of 13,803 prospective students by partnering with 14 UK universities. The survey not only explores the priorities and motivations of domestic students, but also looks at how the coronavirus has shaped and influenced their decisions.

As we look to be nearing the end of lockdowns in the UK, the survey seeks to understand how the crisis has impacted the next cycle of domestic students, how their attitudes have been shaped by the pandemic and what this could mean for the future of the sector. During this time of change, it is more important than ever to examine how the views of prospective students are changing in order to help universities adapt their student recruitment strategies and support their long-term resilience. We believe the insights and analysis in this report will allow universities to plan for new dynamics in student demand and give them a more comprehensive understanding of the underlying drivers of student decision making.

Introduction

Paul Raybould
Marketing Director

Over the last 12 months, the higher education sector has faced unprecedented challenges caused by the global pandemic. When we released our 2020 UK Domestic Student Survey report in April of last year, it was clear then that the effects of the coronavirus outbreak would be far-reaching and profound, although the true extent of the length and impact of the pandemic had not yet been realised. Throughout this challenging period, our insights and services have provided much-needed data and information to make the higher education sector more resilient and we are proud of the role we have played in supporting universities as they have navigated the current crisis.

This year marks the fourth iteration of our UK Domestic Student Survey, and it has been the largest to date, receiving insights from a record 13,803 prospective students. The findings have shone a light on the perspectives of students, many of whom have watched the effects of the global pandemic on higher education from the side lines, and are now preparing to embark on their own higher education journeys.

Most pressingly for universities, many prospective students expect face-to-face teaching to form the dominant mode of delivery for their degrees starting this academic year. This places a tight deadline on institutions to be able to deliver this, and universities must act now to meet these expectations from students.

The pandemic has placed renewed focus on the nation's mental health. The increased pressure brought about by financial concerns, restrictions on socialising and meeting academic deadlines whilst learning remotely has placed significant strain on students' mental wellbeing. Therefore understandably, our research has shown that the perceived importance of universities providing mental wellbeing support and mental health services have significantly increased in the last year. Universities must be equipped to meet this demand for services and provide the level of support needed by students.

There is also significant pressure on the graduate job market, and it is therefore not surprising that future career considerations are a significant priority for prospective students. Despite the difficulties of the last year, prospective students appear to be hopeful about the future. They are feeling positive about the job markets they will be entering into when they graduate, and are optimistic about their future earnings. Universities and employers should prepare to meet these expectations and ensure that students are provided with the necessary information to make important decisions.

Additionally, with tuition fees frozen at the maximum of £9,250 for another year, value for money continues to be a key focus for students. It is vital therefore that institutions look to invest in resources which will help to support students' experiences and provide good value for money.

Furthermore, if the Turing Scheme is to form a successful part of the UK's International Education Strategy and contribute to future economic growth, policymakers and the sector should focus on raising awareness of the scheme amongst students to ensure UK higher education can flourish post-Brexit.

With the success of the UK vaccine rollout painting an increasingly hopeful picture, thoughts are beginning to turn to life after the pandemic. UK universities have a key role to play in helping to shape our future and addressing the biggest issues we are facing. From the climate crisis to driving a green economic recovery, higher education and the opportunities it provides has never been more valuable. Whilst the challenges of the pandemic are not over, now is the time for the sector to look ahead and consider the fundamental role it has to play in delivering a more sustainable future.

Key facts

Collected responses from

13,803 prospective domestic students

in 2021

14 institutions

participated

89% Undergraduate

8% Postgraduate

3% Foundation or Vocational

Survey is now in its

Fourth year

87% English

5% Scottish

2% Welsh

1% Northern Irish

Fieldwork ran from

11 January to 1 March 2021

45% aged 17 or younger

37% aged 18

18% aged 19 or older

Foreword

Daniel Zeichner
MP, Shadow Minister for Food,
Farming and Rural Affairs
and Chair of the All-Party
Parliamentary Universities Group

The findings of this year's Domestic Student Survey (DSS) come after one of the most challenging years for the higher education (HE) sector in recent times. The global pandemic has placed unprecedented difficulties on both students and institutions, and the insights provided by QS in the DSS, and their reports over the last 12 months, have never been more important in helping the sector understand and respond to students' concerns and priorities.

Whilst our universities have worked hard to mitigate the effects of the COVID crisis on students' university experiences through online and virtual offers, the restrictions on face to face teaching and socialising has resulted in students this year having a much changed experience to those before them. The insights in this report are key in helping the sector to understand and recognise the impacts of the last year on prospective students' perceptions and in turn, help institutions address concerns and support student recruitment.

The significant increased pressure placed on the mental health and wellbeing of our students caused by the pandemic has been a key focus of the work of the APPG for Universities, and is reflected in the findings of this report. Even under normal circumstances, student life can be extremely challenging, however with the extra stresses created by the pandemic, we have seen demand for student mental health services rise. It is imperative that universities and Government work collaboratively to ensure that students can access the support they need.

As well as the COVID-19 crisis, the sector has also been navigating the UK's official departure from the EU at the end of last year, and what this means for students and institutions. The Government's announcement that the UK's participation in the Erasmus scheme would be replaced by the new 'Turing scheme' has created some uncertainty in the sector as HE providers and students explore the details of the new programme. It is fundamental that, as the sector begins to feel the impacts of our official departure from the EU, policy makers and providers work together to ensure students can continue to access all of the exciting opportunities that come with higher education.

From playing a key role in the development of vaccines, to undertaking world leading research, and supporting their local communities, over the course of the pandemic, our universities have proved again and again that they are one of our country's greatest assets.

This report reflects the views of over 13,000 prospective students. Policy makers, sector stakeholders and institutions must listen to the wants and concerns of future students to ensure that institutions continue to be able to deliver the best for our students during these current extraordinary circumstances. It has been a challenging year, and the challenges faced by the sector are not over yet, however by working together and listening to the data we can support the long term resilience of our great UK universities.

Recommendations

Preparing students for their studies in September 2021

1. Coronavirus and the 2021 intake

As vaccination efforts continue and the country progresses with its roadmap out of lockdown restrictions, it is vital that universities plan ahead and prepare their campuses for a full return to face-to-face teaching in September.

In the last academic year, students and universities alike have had to adapt to the new normal and embrace online learning on a scale never seen before. Whilst this transition has been borne out of necessity by the need for social restrictions, it is vital that universities fully understand the expectations of those who will start their studies in September 2021 and plan their activities accordingly.

The findings of this report suggest that only 15% of those who will begin their studies next academic year expect the majority of their teaching to be online, and most prospective students expect face-to-face teaching to form the dominant mode of delivery for their degrees. Universities need to plan ahead and prepare their campuses to allow for the return of large numbers of students in September.

Furthermore, over half of all prospective students see online learning as a limiting factor in their ability to interact with both their professors and their peers, which reinforces the notion that they see the value of their degrees predominantly placed in the face-to-face learning environment. It is therefore vital that universities take the appropriate steps to reinstate face-to-face learning wherever possible and in the event that any teaching activities take place online universities must also ensure that staff and student interactions form the basis of any such teaching.

2. A smooth admissions process

Following last year's disruption around university admissions and the cancellation of this year's exams, universities must proactively consider what more they can do to make the admissions process easier for prospective students as they receive their results.

Last summer, many students experienced high levels of disruption with the admissions process following the decision by the UK government to use technology to moderate A-level results, instead of sitting exams. With exams being cancelled for the second year running and A-level grades to be awarded solely by teachers, which is expected to create some grade inflation, it is crucial that the concerns of prospective students with regards to the admissions process are addressed by universities.

This report shows that over half of prospective students expect to face difficulties when it comes to going through the admissions process for universities this year and this is likely to have been exacerbated by last year's disruption. While the report shows an overwhelming majority of students support the decision to cancel this year's exams, these finding underline the overall level of concern amongst prospective students and illustrates the need for additional supportive measures to be introduced by universities to help them with the admissions process, especially if there is an expected increase in grade inflation.

3. Enhancing mental health support services

The measures required to combat the coronavirus at universities have led to a renewed focus on the mental health of students. Universities must enhance their support for the mental wellbeing of their students by engaging in a range of activities.

The experience of lockdown whilst in student accommodation has led to a significant focus on the mental health of students and the impact of social isolation on their studies. The perceived importance of universities providing sufficient mental wellbeing support and mental health services has significantly increased in the last year. However, it will concern universities that prospective students are also less convinced of their ability to support students when it comes to their mental health over the course of the last year.

To enhance their support services in this area, universities must engage in a variety of activities if they are to reassure their students that they will be fully supported while undertaking their studies. Offering access to specialist help in the form of mental health advisers or student counselling sessions are both effective ways to do this, whilst promoting the availability of 24-hour helplines for students (those either set up by the university or by third-party charities) as another well-regarded avenue for help. Universities must also be prepared to be flexible when it comes to coursework submission deadlines, as the concern of keeping up with academic work is one of the most significant sources of pressure for prospective students.

4. Helping students plan for the future

Future career considerations are a significant priority when prospective students come to fill out their university applications. Universities need to reflect this in their support services, as prospective students anticipate that by the time they graduate, the job market will be at full strength.

With the news that young people are significantly more vulnerable to losing their job than older age groups as a result of the coronavirus, it comes as no surprise that it is important for prospective students that their chosen course is specific to the industry they would eventually like to work in. It is vital that universities are aware of this and adapt their communications to reflect the importance assigned to it by prospective students. Not only this, but two-thirds of this audience are optimistic about their employment prospects after they graduate, which reinforces the notion that universities need to adapt and enhance their career support services if they are to match the ambitions shown by their students.

One of the most significant perceived knowledge gaps amongst prospective students when planning their future career is whether they will need to undertake postgraduate study. It is important for universities to ensure their prospective students understand the options available to them when choosing a course and are aware of which undergraduate courses are required for postgraduate study. This will help them to make fully informed decisions when planning their future careers.

5. Future investment priorities

With many students confined to their rooms and only able to attend lectures and seminars virtually, it is important for universities to invest their resources appropriately to maximise the students' return on investment for their tuition fees.

Encouragingly, the amount that students have to pay in tuition fees is gradually becoming less of a barrier to them applying to university. However, it is clear that they place a large part of the value of their degrees in the face-to-face elements as only a minority of 26% would consider studying a degree online, even if it led to a discount on their tuition fees. This reinforces the assertion that universities need to act accordingly in order to allow a full return to face-to-face teaching on their campuses in September.

The implementation of lockdowns in student Halls of Residence has focused attention on the quality of life for students. Improving university accommodation is now seen to be the most valued way for universities to enhance the student experience and ensure they get the best return on their tuition fees. Universities need to communicate how they are allocating their resources so that students are better educated on how their tuition fees are divided up and spent.

6. Growing international education in the UK

As the UK looks to fulfil the ambitions of its recently updated International Education Strategy, it is vital that the government and universities work together closely to boost the awareness and understanding of the Turing Scheme amongst prospective domestic students.

Following the UK's withdrawal from the Erasmus+ Programme after leaving the EU, the government announced that it will be replaced by the £110 million Turing Scheme that hopes to support 35,000 participants in exchanges around the world[1]. The scheme recently opened for bids from institutions, however awareness and intention to use the scheme amongst prospective domestic students has been low to date, providing an uncertain picture for one of the strategy's key pillars.

Our report shows that only 12% of all prospective students claimed to have heard of the Turing Scheme with the majority unaware of the replacement to Erasmus+. It is therefore clear that the short-term goals of the programme should focus on raising awareness and understanding of the scheme amongst students if it is to achieve its goals of supporting 35,000 participants in exchanges worldwide, and form a successful part of the UK's International Education Strategy so UK higher education can flourish post-Brexit.

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1 https://commonslibrary.parliament.uk/research-briefings/cbp-9141/

Section 1 – How the coronavirus will affect student recruitment in 2021

Key findings

- Over half (52%) of all prospective students expect some level of difficulty when going through the admissions process to study at university this year

- 70% of all prospective students agree with Ofqual's decision to cancel A-level exams this year and to replace them with teacher-awarded grades

- 61% expect the majority of their teaching to be in a face-to-face setting when they begin their studies in September

- 54% believe it is more difficult to ask questions of lecturers in an online setting, compared to a face-to-face setting

How do prospective students think the coronavirus will impact the admissions process?

The UK higher education landscape has shifted dramatically in the last 12 months due to the coronavirus. The implementation of travel restrictions, social distancing, isolation measures and quarantining have all become familiar features for many of us. For prospective students looking ahead to the next stage of their education, the pandemic has severely restricted their ability to effectively prepare for this. It is important that these limitations are considered by universities and that the concerns of prospective students with regards to the admissions process are taken seriously, in order to alleviate some of the pressure placed on the next generation of students.

To gauge the overall impact of the pandemic on student decision making, we asked prospective students whether the coronavirus had impacted their plans to study at university. The results suggest that this audience are divided in terms of the perceived impact on their plans; 39% claim to have been affected, but somewhat encouragingly for the sector, 45% perceive the pandemic to have had no impact whatsoever on their plans to study in higher education. The relatively even split in opinion is likely to be reflective of the overall level of uncertainty with regards to the coronavirus and that

prospective students' intentions will vary hugely on a case-by-case basis. However, it is clear that a significant proportion of prospective domestic students are looking to the next academic year with relative optimism and see the coronavirus as a barrier which will be largely overcome by the time they enrol. Nevertheless, for those who are more cautious, the need for timely, clear information with regards to the admissions process will only become more pressing. As such, it is important that universities are able to consistently communicate with their prospective students as the situation evolves over the coming months.

Whilst this demonstrates the potential for the coronavirus to impact domestic admissions numbers in 2021, it is also worth mentioning that the impact is (unsurprisingly) significantly higher on prospective international students. Our QS Coronavirus Student Survey tracks the views of this audience on the pandemic and how it has impacted their decision making. Amongst this audience, nearly two-thirds have had their plans to study at university disrupted, with many deferring or delaying their studies abroad. This reiterates the importance of domestic intakes for universities, as the impact of the coronavirus is likely to disrupt international cohorts for the second year in a row.

Furthermore, those looking to study at a postgraduate level are significantly more likely to have had their plans interrupted by the coronavirus, with 44% claiming this to be the case. This suggests that prospective undergraduate students are more determined not to let the pandemic affect their higher education journey and are more willing to find ways which allow them to do this. By contrast, those looking to study at a postgraduate level, which broadly speaking involves more contact hours, have a greater reliance on laboratory work or involving study facilities only found on-campus and are more hesitant with regards to the coronavirus and its potential impact. It is also likely that prospective postgraduate students feel they can take some time off in between their studies between undergraduate and postgraduate level, whereas undergraduate prospects do not feel they can afford this luxury. It is important that universities are aware of the additional, complex needs of prospective postgraduate students and can reassure them that the quality of teaching they will receive in September will meet the standards they expect.

Has the coronavirus affected your plans to study at university?

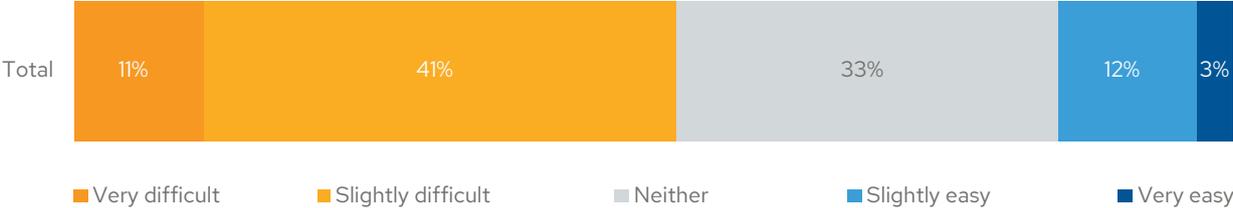|	Total	Undergraduate	Postgraduate
Don't know	16%	16%	11%
No	45%	45%	45%
Yes	39%	39%	44%
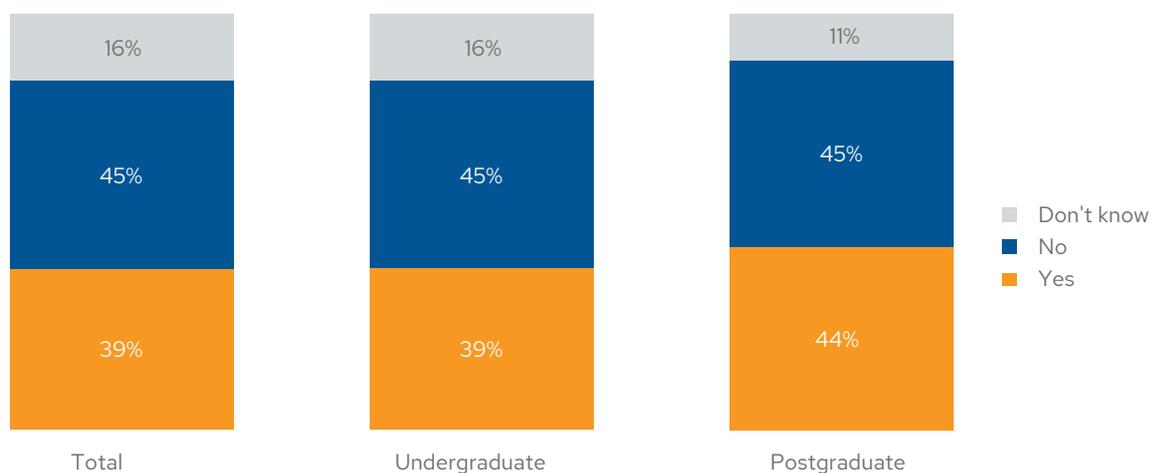
Whilst this gives a broad picture of the potential impact of the coronavirus on the next student intake, it can also be helpful to look at the views of prospective students on the admissions process specifically. By analysing the level of concern amongst this audience, we hope to reiterate the need for universities and stakeholders within the industry to support their domestic student cohorts appropriately and for any additional measures to reflect these mitigating circumstances.

When asked about the prospect of going through the admissions process for universities this year, over half (52%) expected some degree of difficulty in doing so. By contrast, only a relative minority (15%) consider the prospect to be an easy one. This demonstrates the overall level of concern amongst prospective students and goes some way towards illustrating the need for additional supportive measures to be put in place to help them in this regard.

Another important point to make is that fieldwork for the survey took place throughout the months of January and February. As such, it captured the views of prospective students at various points in the admissions cycle. From those who were still researching which universities and courses they would like to apply for, through to those who had already accepted an offer to study in September. For those who had already been through most of the admissions process already and who had accepted their offers to study, they saw the process as being significantly less difficult and much easier than their counterparts who were still in the early stages of the admissions cycle.

It is important to communicate the availability of supportive measures to all prospective students, as it is clear the process will seem much more daunting in the initial stages of the admissions cycle. Those universities which can communicate an appropriate level of support will feel the benefit when it comes to recruiting domestic students to their universities. In the next section, we look at this in more detail, with a specific focus on the impact of the decisions made with regards to A-Level exams and how students are awarded their grades for the current academic year.

How easy or difficult do you think it will be to go through the admissions process for universities this year?

Total	Very difficult 11%	Slightly difficult 41%	Neither 33%	Slightly easy 12%	Very easy 3%

■ Very difficult ■ Slightly difficult ■ Neither ■ Slightly easy ■ Very easy

What do prospective students make of the decision to cancel their exams this year?

On 25 February 2021, Ofqual announced the cancellation of A-Level exams this summer, stating that it was unable to hold these examinations in a way which was fair to students. Instead, it directed that teachers and schools would be free to decide students' final grades using a combination of coursework, mock exams and essays[2]. Whilst the debate around the potential uneven consistency of awarding grades across different schools rumbles on, combined with concerns from some that this method could lead to grade inflation, it is important to consider this strategy from the point of view of those it directly affects, namely prospective students[3]. By showing their views on this decision, we hope to highlight the need for cross-sector organisation which takes into account student preferences when it comes to admissions to universities.

When asked whether they thought A-Level exams should have gone ahead this summer, an overwhelming 70% thought that they should not have happened and were therefore happy for them to be cancelled. By contrast, only a minority of 14% believed they should have gone ahead. Whilst these figures exhibit some differences amongst sub-groups based on income, for example 18% of those in households earning under £10k thought exams should have been cancelled, compared to only 12% for those earning more than £100k, it is clear that for the most part, prospective students are firmly decided in that they would prefer their final grades to be determined by schools and teachers and not through end of year exams.
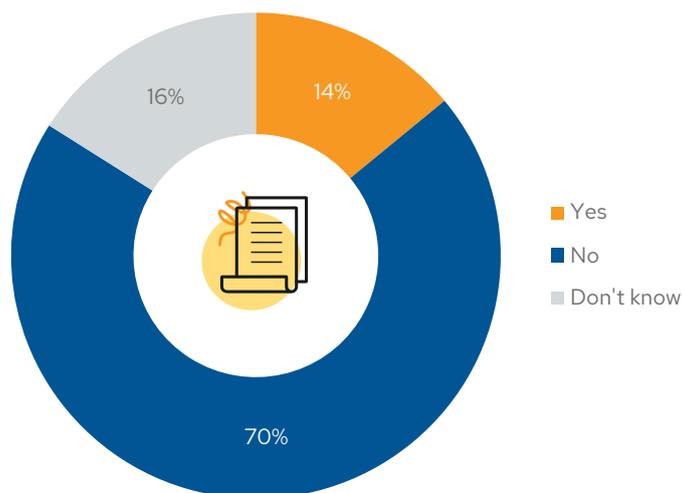
The data also highlighted differences in how prospective students believe grades should be awarded; 52% of prospective students from households earning under £10k thought admission to university should be based on predicted grades, compared to 60% from those earning more than £100k. Whilst 66% of those in households under £10k thought grades should be awarded by a teacher, compared to 71% for those earning more than £100k. These findings suggest that students from lower income households believe that their predicted grades are a truer reflection of their achievements, perhaps reflecting a lack of trust in a system based predominantly on teachers' perceptions fuelled by the issues with the grading system last year. The overall findings strongly reiterate that it was the correct decision to cancel exams and that concerns that it would not be fair to students were well-founded.

Whilst online learning has allowed teaching to continue, it is largely accepted that some elements which rely on peer-to-peer interactions and discussions with teachers have been affected. It is therefore highly encouraging to see that the viewpoints of students have been incorporated into the decision to cancel exams.

2 https://www.gov.uk/government/speeches/how-qualifications-will-be-awarded-in-2021

3 https://www.bbc.co.uk/news/education-56157413

Do you think that A-level exams should go ahead this summer?

16%

14%

70%

■ Yes
■ No
■ Don't know

With a clear preference from students to cancel end of year exams, we can now turn our attention to how they believe their final grades should be awarded. Whilst it remains to be seen whether the government's reassurances that the system they have devised will lead to a fair allocation of results, it is important to consider the preferences of students in this new system and how they would like their final grades to be determined.

The new system of awarding grades is expected to be built around teachers' judgements and will give them the freedom to determine which methods to use to decide on final grades. With this in mind, it is encouraging to see that a majority of 55% would prefer their admission to universities to be based on their predicted grades ahead of any grades achieved by their performance in formal or informal exams. Only a quarter (26%) would want to see their admission to university rely on their grades achieved in exams. It is therefore important to consider the use of predicted grades in the new system of awarding final marks for those in school, as prospective students see them as being a preferable option. Those in higher education need to work with the government and with those in secondary education to advocate for the use of predicted grades when it comes to admissions to universities.

Do you think admission to universities should be based on your achieved or predicted grades at A-level/IB/BTEC?

19%

55%

26%

■ Predicted grades
■ Achieved grades
■ No preference
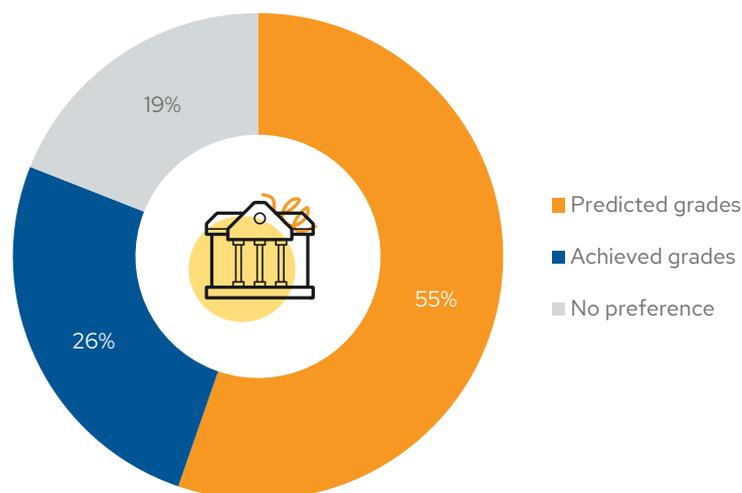
The new system looks to place teachers at the centre by giving them the power and flexibility to award final grades based on their own assessments of the student. It is interesting therefore to see that students are firmly in agreement on this point. When asked how they would prefer their grades to be awarded at the end of the year, the overwhelming majority of 70% claimed they would like their teachers to be the ones responsible for this. Only a minority of 18% would want their grades determined through their performance in exams. This reiterates that the decision to give teachers and schools the authority to award grades appears to have been the right one, as seen from the perspective of students in secondary education. It is now important that the new system supports schools and teachers by giving them the resources they need to ensure this process can take place effectively and, in a time-efficient manner.

With grade inflation expected to be an issue, the results achieved by A-level students this year will likely be subjected to high levels of scrutiny. The higher education sector needs to work with the government and with schools to support the new system of awarding grades. It is vital they recognise the preferences of their prospective students and that it is correct for schools and teachers to be given the final say on this matter.

How would you prefer your grades to be awarded at the end of the academic year?

18%

13%

70%

■ Through exams

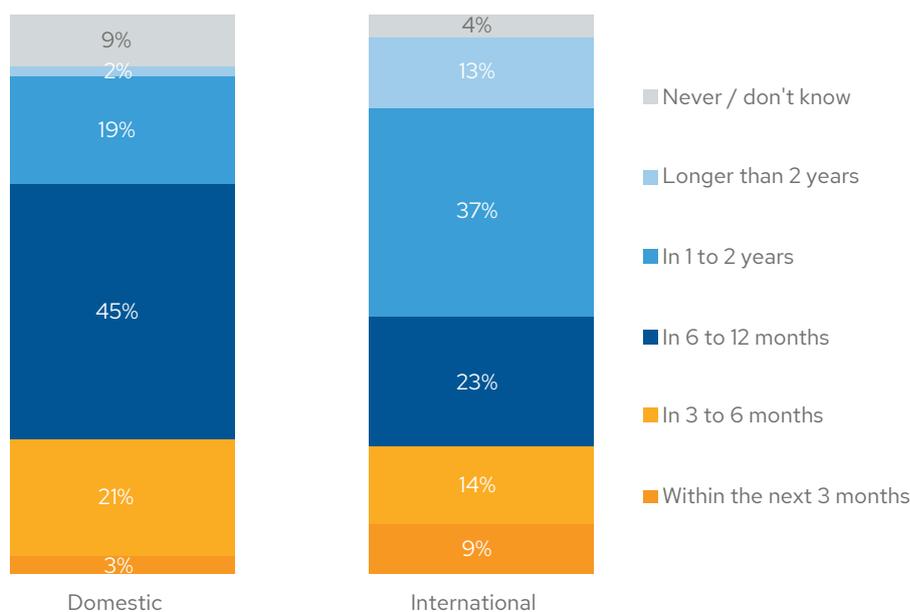■ Awarded by a teacher

■ No preference
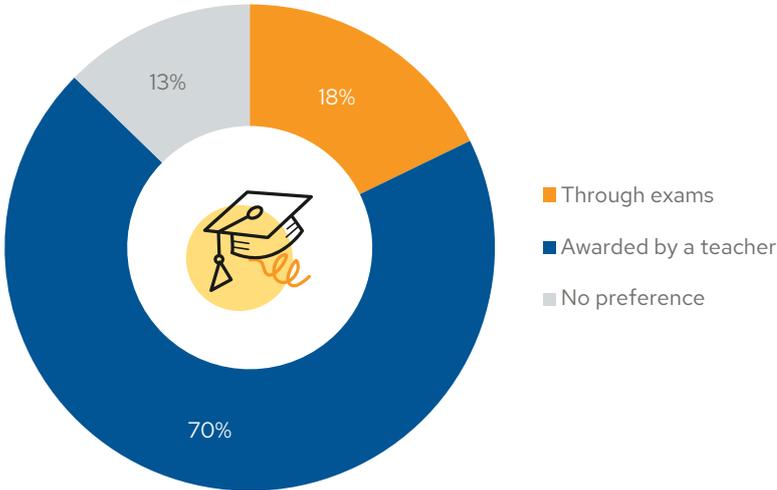
What are their expectations of universities when they begin their studies in September?

Over the last 12 months, universities and lecturers have had to pivot their online learning capabilities and adapt to allow teaching to continue. With campuses in lockdown, and the majority of lectures delivered online, this has led to a fundamentally different university experience for those currently enrolled in higher education. However, as the vaccination programme in the UK progresses and a return to normal everyday life becomes a more realistic probability, it is worth examining the views of prospective students to see what their expectations are of universities for the next academic year.

Firstly, it is worth highlighting the expectations of prospective students when it comes to campus life. When asked when they expect a return to normality, more than two-thirds expect this to happen within the next 12 months (or by the end of 2021, given that fieldwork took place between January and February of this year). Whilst a significant minority expect it to take longer than this, it is clear that most prospective students think the UK has taken the appropriate steps to allow normal life to return and that by the time they begin their studies in September most restrictions will have been lifted. It is important that universities act now to prepare their campuses for the return of significant numbers of students at this time, as it is clear that next year's intake of students expect a fully available campus with all the associated facilities that come with this.

It is also worth noting that domestic students are significantly more optimistic than their international counterparts when it comes to their expectations for a return to normality. This reiterates the success of the vaccination programme in the country so far and that the implementation of a roadmap out of the country's lockdown appears to have had a positive impact on many students' expectations for a quicker return to normal life. It also further reiterates the importance of domestic student cohorts to universities over the coming year, as international students are likely to continue to be affected for the rest of the calendar year and may be unable to travel to the UK to begin their studies.

When do you think normal campus life will be able to resume for students?

Domestic:
- 9% — Never / don't know
- 2%
- 19%
- 45%
- 21%
- 3%

International:
- 4% — Never / don't know
- 13%
- 37%
- 23%
- 14%
- 9%

Legend:
- Never / don't know
- Longer than 2 years
- In 1 to 2 years
- In 6 to 12 months
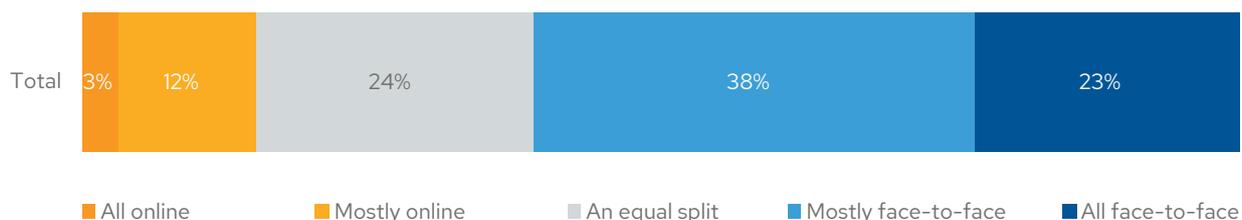- In 3 to 6 months
- Within the next 3 months

Given these expectations around a return to normality, it is worth evaluating the expectations of prospective students when it comes to teaching practices as well. When asked how they expected to be taught when they began their degrees in September, most prospective students expect the majority of their teaching to take place in a face-to-face setting. Only a quarter would expect an equal split between online and face-to-face teaching and less than a fifth expect the majority of their teaching to be online. It is clear that their expectations on a return to normality go hand in hand with their expectations on how they would like to be taught when they begin their studies, as those who expect a quicker return to normal life also expect more of their teaching to take place in a face-to-face setting.

The results here suggest that prospective students expect teaching capabilities to have switched back to allow face-to-face teaching to become the dominant mode of delivery for students. Whether this will be the reality will depend on the success of the country's vaccination programme and the success with which the government's roadmap out of lockdown is implemented. However, what is clear is that universities need to act now to ensure that they are equipped to allow face-to-face teaching to occur in a safe and appropriately managed environment for the start of the new academic year.

In QS' Coronavirus Student Survey, we have highlighted that prospective international students prefer socially distanced, face-to-face lectures over online lectures and it seems the same is true for domestic students here. If this is true, then universities need to prepare their campuses for teaching to take place in a safe and socially distanced manner, as they will not be able to rely solely on online teaching if they are to meet the expectations of their new student cohorts.

## How would you expect your preferred course to be taught when you begin your studies this year?

Total	3%	12%	24%	38%	23%

■ All online   ■ Mostly online   ■ An equal split   ■ Mostly face-to-face   ■ All face-to-face

Finally, we can also look at the views of prospective students on online learning to gauge how they feel it would impact their studies. The results suggest that they see online learning as limiting their ability to interact both with lecturers and with their fellow students. In previous years of the UK Domestic Student Survey, we have highlighted the value that students place on being able to interact with other students and with the teaching staff. Many students see this as a fundamental part of their studies and their university experience. Therefore, it may come as no surprise to see that they perceive online learning as being a limiting factor in this essential part of their degree; 54% believe that asking questions of lecturers would be less accessible to them in an online setting, whilst 69% believe that interacting with their fellow students would also be less accessible. Not only is it important for universities to structure their online teaching practices to allow these interactions to take place virtually, but it is also important that come September, they have adapted their campuses to ensure that face-to-face teaching can take place with a view to allowing students and teaching staff to interact and engage as much as possible.

By contrast, 42% do see the benefits of online learning and believe that working whilst also studying would be easier if they studied online. When promoting the benefits of online study, it is important to focus on the flexibility this gives students and the fact this affords them a greater degree of control over how they allocate their time. From our work with prospective international students in our International Student Survey, we know that it is these elements, rather than the cost savings which most appeal when it comes to selling the benefits of online study.

Do you think the following aspects of online degree courses would be more or less accessible to you?
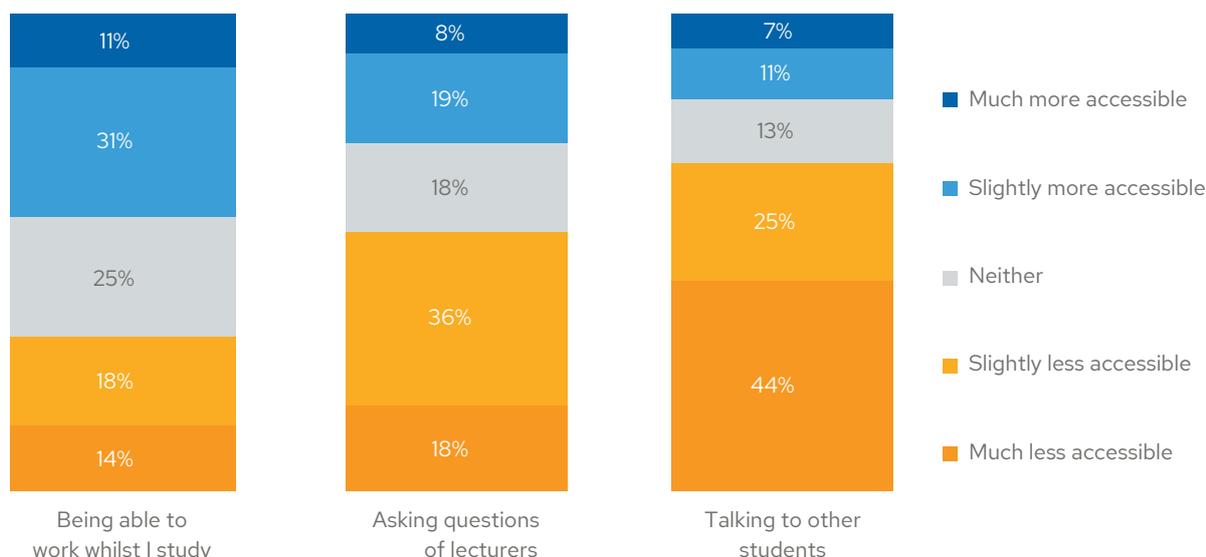
Section 2 – How student support services need to adapt in 2021

Key findings

- A minority of prospective students think universities have effectively supported their student cohorts throughout the pandemic

- The proportion of prospective students who think that universities are well equipped to deal with student mental health has significantly declined in the last year

- Mental health services are increasingly seen as one of the most important ways for universities to support their students

- The best way for universities to show their support for students is through a combination of access to mental health advisers and flexibility with regards to coursework deadlines

How effectively do prospective students think universities support students when it comes to their mental health?

The prospect of starting university can be a daunting one for students even at the best of times. The pressure of leaving home for the first time and moving away from their family and friends to build a new life in an unfamiliar setting, combined with the additional pressure of university work would be enough to leave many feeling overwhelmed. In 2020, students have not only had to contend with all of this, but they have also had to deal with the coronavirus crisis and all the subsequent effects that that would entail. This has meant enduring lockdowns whilst living in Halls of Residence, experiencing a fundamentally different learning format to that of previous years, and a significantly more limited university experience than they would have been expecting. When it comes to students choosing where to live, a 'safe and welcoming' environment is the most important factor for them. Therefore, it would only be natural for them to see the implementation of lockdowns, self-isolation and social distancing as significant causes for concern and for this to have an impact on their mental health.

Against this backdrop, the student mental health crisis in universities has been exacerbated. It is important to understand how much confidence students have in their universities to support them as well as gauging how much of a concern this issue is for them. In this section, we will analyse how effectively prospective students perceive universities to have supported their student cohorts throughout the pandemic and evaluate how these perceptions have changed over time.

Whilst many prospective students are unlikely to have experienced life as a student in lockdown, their perceptions of how well universities have managed the situation with regards to their current student cohorts can still be a useful way to gauge the sector's overall success in dealing with the issue. When asked how effectively they thought universities had supported their students during the crisis, prospective students are largely divided. In all likelihood, this could reflect the varying responses from different universities in the ways they have supported their students, and without experience of being a student in lockdown, is likely based on information that prospective students have received online and through the media. However, it is interesting nevertheless to see that only a relative minority of 14% think that universities have been 'extremely' or 'very' effective in supporting their students. By contrast, nearly half of all prospective students think that universities have been 'slightly' or 'not at all' effective in supporting their students. Whilst this is undoubtedly fuelled by recent coverage of universities taking actions to ensure their campuses and student halls remained in necessary lockdowns (sometimes to the detriment of their students), it is clear that universities need to be seen to do more to provide emotional support to their students during the pandemic.

From our work on QS' Coronavirus Student Survey, we observed that those students who have a positive impression of their university during the pandemic is normally because of the university's attempts to support their student population with their mental health. By contrast, those who have a less than favourable view of their institution is usually the result of a lack of recognition by the university of the toll the pandemic has taken on their mental health and a lack of any additional support services to alleviate this.

How effective do you think universities have been in supporting students during the outbreak of the coronavirus?

Total	3%	11%	40%	28%	19%

■ Extremely effective ■ Very effective ■ Moderately effective ■ Slightly effective ■ Not at all effective
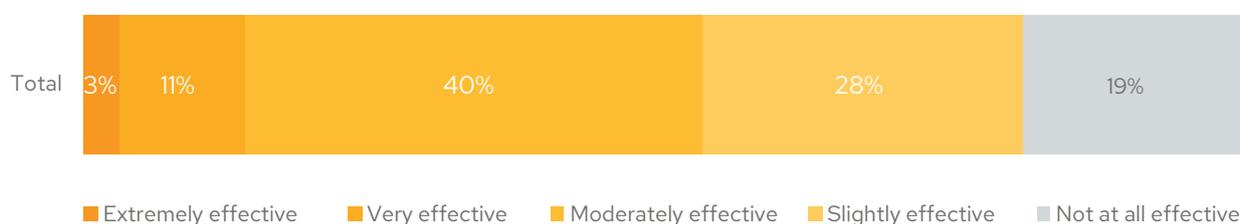
Given the strain that the pandemic will have placed on student mental health, it is also important to consider how well equipped they think universities currently are in supporting their own students in this area. When asked about this, less than a quarter thought that universities were well prepared to support students on their mental health and just less than half claimed not to know how well-equipped universities were in supporting students in this manner. Given that the majority of our survey audience either have not attended university yet or are unlikely to have had first-hand experience with these kinds of support services, it is perhaps unsurprising to see that such a large proportion are unsure about this issue.

Nevertheless, the point remains that this is a topic which is being neglected by universities when they communicate with their prospective students. It is vital that students arrive at university with a comprehensive knowledge of the appropriate support structures in place if they need to access them, and that universities are able to establish the optimum strategy to communicate their own capabilities in this regard.

Of further interest is the fact that the proportion who have a favourable opinion of universities with regards to their mental health support has significantly declined compared to last year. In 2020, 33% of prospective students thought universities were well prepared compared to only 24% in 2021. It is likely that the events of the last year have had a negative impact on prospective students' perceptions of universities and their ability to support their student cohorts when it comes to their mental health. Universities need to do more to recognise and appreciate the strain that the pandemic has placed on their students and communicate the availability of their support services more effectively if they are to win back the trust of their students and to encourage prospective students to enrol there.

It is clear that the last year has placed a significant strain on student mental health and challenged universities to provide a more comprehensive support network for their students. Those universities which recognise the importance of this situation and take the necessary steps will benefit from being able to tangibly demonstrate that they were able to support their student populations at a time when they needed it most. In the next section, we will look at the services which universities can provide that are most valued by prospective students.

Do you think that universities are well prepared to support students on issues surrounding their mental health?
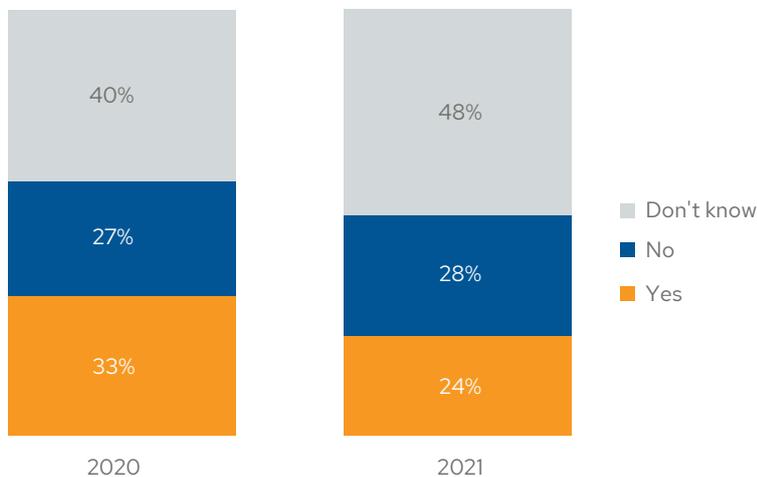
What support services are the most important for universities to provide?

The topic of support services and specifically those services which relate to students' mental wellbeing is highly sensitive. Each student who requires access to these services will have their own specific needs which will need to be addressed. However, it remains important for universities to know which support services are most desired at a broader level, as once these have been established, it is then easier to factor in the individual's specific circumstances and administer treatment in a more effective manner on a case-by-case basis. In this section we will look at what universities can do to support their students on this subject and provide recommendations on what specific services would be most valued.

At an overall level, it is clear that many prospective students are concerned about the level of support they might receive when attending university for the first time. When asked what they think the most important support services a university should offer to their students are, support for mental wellbeing and mental health counselling were the second and third most desired services, with 51% and 49% selecting these, respectively. In total, 80% of all prospective students saw at least one of these services as being important. The fact that four-fifths of all prospective students see these services as being of importance hints at the scale of the issue as seen from the point of view of the student. Not only does this reaffirm how much importance prospective students place on their own mental health, but it also reiterates the need for universities to ensure they are allocating their resources effectively to reflect this.

Of further interest is the fact that when these results are compared to those gathered in 2020, the perceived importance of mental health support services has significantly increased. The proportion selecting mental wellbeing services has risen from 45% to 51% and those selecting mental health counselling has risen from 44% to 49%. Those selecting either of these options has risen from 72% in 2020 to 80% in 2021. This demonstrates that the pandemic has led to a renewed focus on the availability and importance of these types of support services for students and the last year has placed the issue of mental health firmly on their radar. It is vital that universities acknowledge this and enhance their support services accordingly in order for them to effectively manage the mental wellbeing of their student cohorts.

It is also worth focusing on the fact that a money advice service is consistently seen as the most desired support service, with over half of all prospective students believing universities should offer this. With the cost of a university degree set at its highest level ever, and the pandemic placing increased financial pressure on students and young people it is perhaps unsurprising to see this emerge as a high priority for prospective students. Nevertheless, it reiterates how important it is for universities to be able to support their student cohorts with information about budgeting and financial planning as students become ever more conscious about their spending whilst they are also studying. In later sections, we will look at the perceived value for money of degrees and how universities can maximise the perceived return on investment for students.

What are the top three most important support services that you think a university should offer to students?

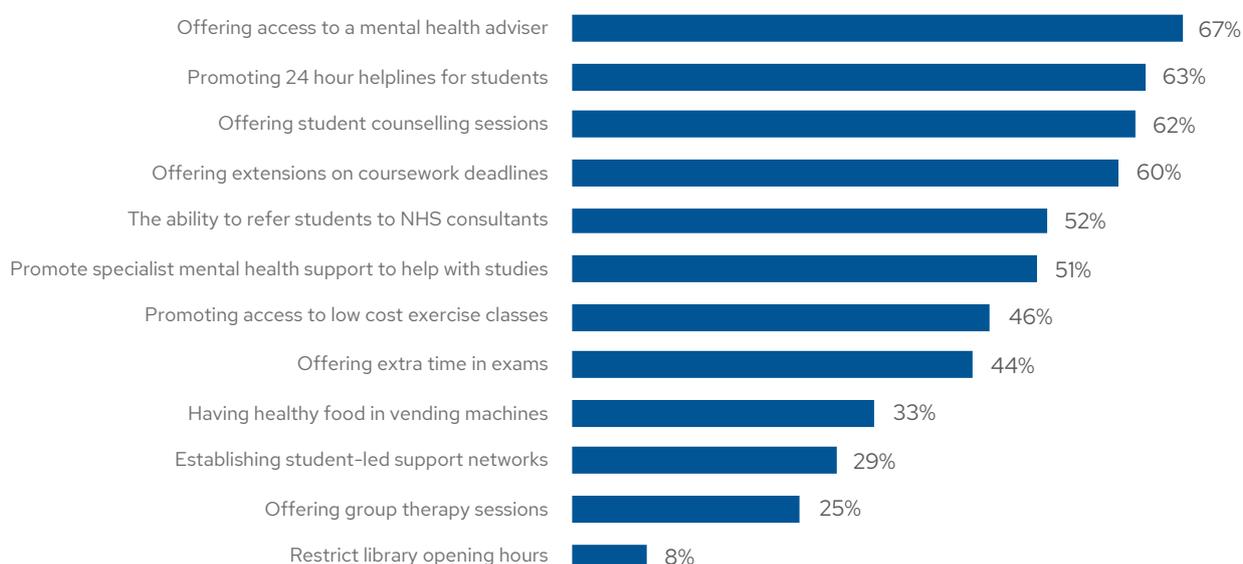| Service	2021	2020
Money advice service	53%	54%
Support for mental wellbeing	51%	45%
Mental health counselling	49%	44%
Careers advice service	49%	48%
Health/medical centre	37%	37%
Housing advice service	29%	24%
Sports services	17%	18%
Disability advisory service	15%	12%

■ 2021 ■ 2020
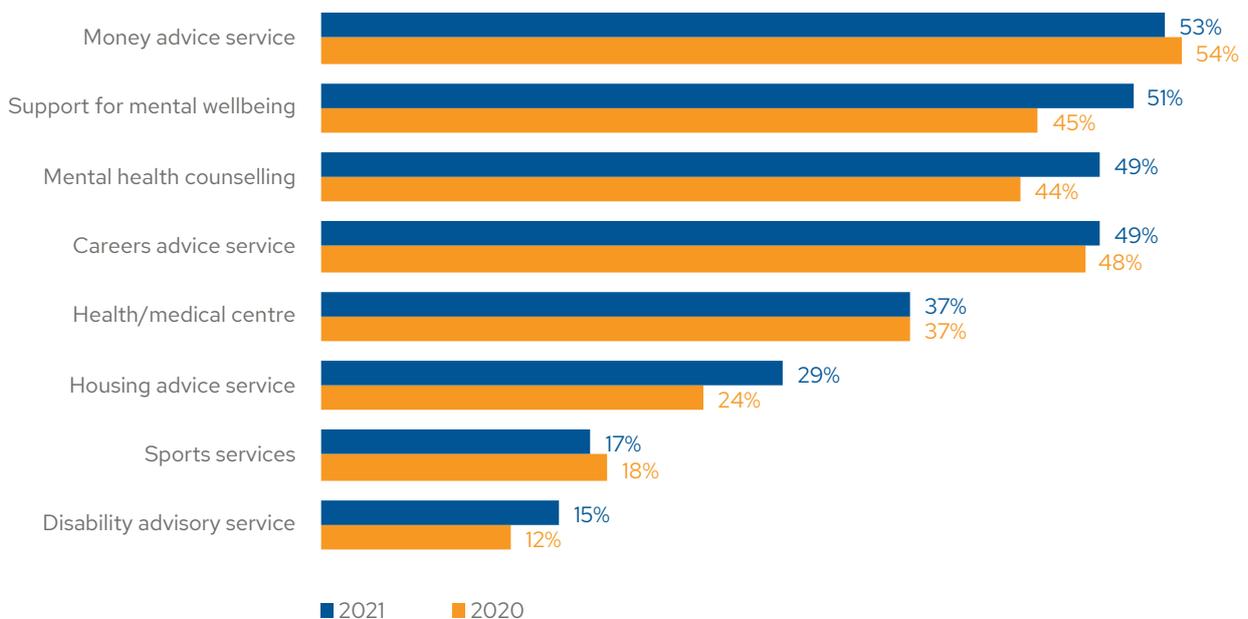
Now that we have established the importance of mental health support services, we can turn our attention to what activities universities can engage in which would be most valued by students. When asked what they thought universities should be doing to help support students with their mental wellbeing, a clear hierarchy emerges. The most desired services are access to a mental health adviser (67%), promoting 24-hour helplines (63%), offering student counselling sessions (62%) and offering extensions on coursework deadlines (60%). These top four services span multiple areas of university life; not only is it important for them to have their own in-house services in the form of mental health advisers with the option to provide their own counselling sessions but support of an academic nature can also be a useful tool in supporting student mental health.

Extending coursework deadlines is seen as a highly effective way for universities to acknowledge the strain which the pandemic has placed on students and for them to act accordingly. It is also worth noting the increase in those who see this as an effective way for universities to help their students, rising from 45% in 2020 to 60% in 2021. This is clearly a result of the move to online learning, which in some cases has made it more difficult for students to keep up with their academic studies. Indeed, a recent study of distanced learning students found that 62% said that assessment caused the biggest strain on their mental health[4]. Universities need to consider the option of extending coursework deadlines carefully as it is clear that they are a significant source of worry for many prospective students, so by being flexible with regards to their submission deadlines they can potentially alleviate this.

On average, prospective students selected five out of the twelve options on this list, which reiterates the need for universities to have a range of support services they can offer to their students. It is important to be able to offer a combination of quality services from trained professionals in the form of counsellors and advisers but also to acknowledge that being flexible with the academic side of their university experience is also a useful tool in supporting students when it comes to their mental health.

Which of the following should universities be doing to support students mental health?

Offering access to a mental health adviser	67%
Promoting 24 hour helplines for students	63%
Offering student counselling sessions	62%
Offering extensions on coursework deadlines	60%
The ability to refer students to NHS consultants	52%
Promote specialist mental health support to help with studies	51%
Promoting access to low cost exercise classes	46%
Offering extra time in exams	44%
Having healthy food in vending machines	33%
Establishing student-led support networks	29%
Offering group therapy sessions	25%
Restrict library opening hours	8%

4 https://www.theguardian.com/education/2020/nov/18/students-feel-vulnerable-how-covid-19-has-put-a-strain-on-mental-health

In summary

The coronavirus has led to student mental health receiving increasing amounts of media attention. The transition to online learning and students being confined to their Halls of Residence for much of the last academic year has placed a significant toll on their mental health. The next generation of students are aware of this and will be looking to universities for reassurance when it comes to supporting their students throughout the pandemic. It is important for universities to communicate the availability of their support services and be flexible when it comes to coursework deadlines, so that students are aware of the support offered to them.

Section 3 – Future career planning

Key findings

- Future career considerations are the second most important priority when it comes to choosing a course for prospective students, after high quality teaching which is the top priority.

- Two-thirds of all prospective students are optimistic about their employment prospects after they graduate

- Over half of all prospective students do feel they received enough help in planning their future careers whilst applying to go to university

- Information about postgraduate study is the biggest knowledge gap when it comes to planning their future career path

How optimistic are prospective students about their employment prospects?

The coronavirus has had a detrimental impact on large parts of the economy, and at the start of 2021, unemployment was at its highest level since 2016[5]. Studies have consistently shown that young people have absorbed the highest level of job losses in the last year with a recent study suggesting that one in eight recent graduates are currently employed[6]. With this in mind, it is worth evaluating the extent to which prospective students are thinking about their employment prospects and their lives after they graduate, to see whether the pandemic has changed the way they make decisions with regards to their studies. By showing that prospective students are for the most part optimistic about their own economic prospects, we hope to demonstrate that young people continue to see the value of a university education when it comes to planning for their future careers.

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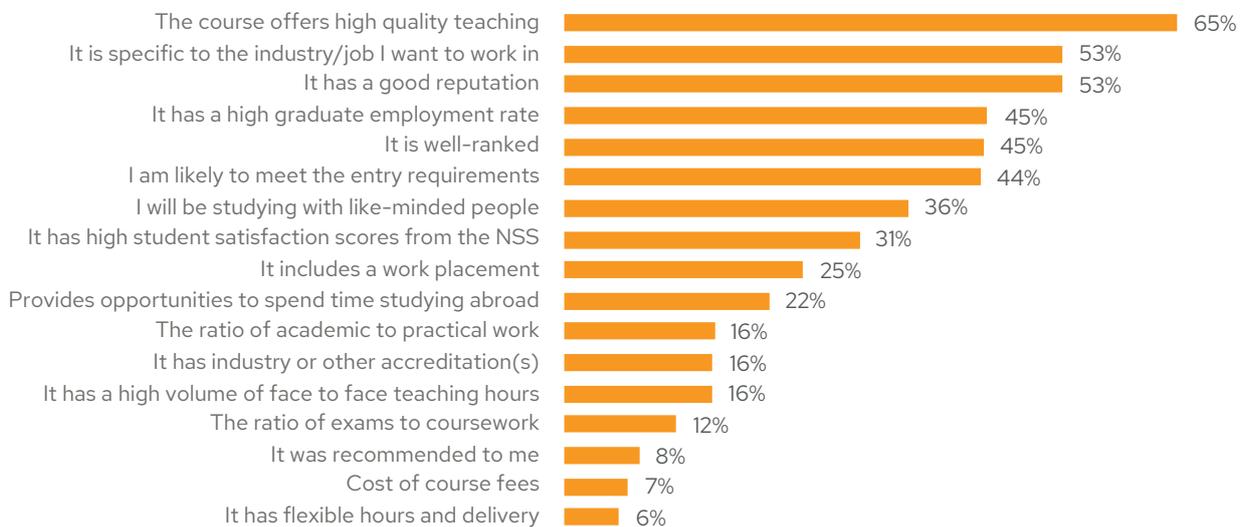5 https://www.bbc.co.uk/news/business-56165929
6 https://www.ft.com/content/20c0e456-396b-46d3-ba20-abf6542d5cf6?accessToken=zwAAAXgTJa7gkc8gwORWOWtG09
O6IKv2VC1c9g.MEUCIBursYiBjO9MYjqs2ZVqOtxlwPls_TS8Ig7MUgu1sUirAiEAmIf1GTBvWhsAYnoZ_hvaPChnAAhB_Jm80myyLo
amjWM&sharetype=gift?token=576757fd-9fa2-4938-b1af-a897bb0237f5

When asked about their top priorities when choosing a course, the most important aspect was that the course offered high quality teaching. Whilst it may be unsurprising to see this emerge as an important aspect in their decision making, it is worth reiterating that prospective students will consistently be on the lookout for any tools and metrics which help them gauge the quality of teaching on any particular course. The data from our survey suggests there is an inherent link between perceptions of teaching quality and graduate outcomes, and when asked what factors indicated high quality teaching at any given institution, a high graduate employment rate was the most cited answer. Universities need to appreciate the extent to which this metric indicates a variety of elements about their teaching standards and act accordingly.

Of further interest, however, is that the course is specific to the industry or job that they want to work in is the joint second most important factor when choosing a course to study. This demonstrates that prospective domestic students are thinking about their future careers and their lives after graduation even at the point of filling out their application to go to university. This means that they will consider all the information imparted to them by universities from their own perspective with regards to how it will be able to help them in their future careers and how it can help them to be successful. The forward-thinking nature of this audience needs to be reflected back to them by universities in the way they communicate with them during the enquiry and application process.

It is also worth mentioning the importance of a high graduate employment rate, which is the fourth largest priority for prospective students. This reiterates the point that this audience value any metrics and tools which will help them gauge the effectiveness with which a university can help their graduates find employment after they have finished their studies. Whilst most universities are able to communicate this measure effectively and appreciate its value to prospective students, they also need to ensure they are helping their students when it comes to career support. By highlighting any additional services, such as CV reviews and access to careers advisers, they can better support their current student populations and convince prospective students that this is an area which they take seriously.

What five things are most important to you when choosing a course?

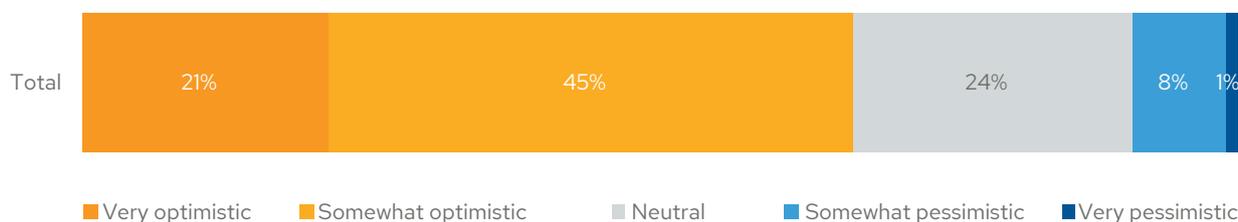| Factor	Percentage
The course offers high quality teaching	65%
It is specific to the industry/job I want to work in	53%
It has a good reputation	53%
It has a high graduate employment rate	45%
It is well-ranked	45%
I am likely to meet the entry requirements	44%
I will be studying with like-minded people	36%
It has high student satisfaction scores from the NSS	31%
It includes a work placement	25%
Provides opportunities to spend time studying abroad	22%
The ratio of academic to practical work	16%
It has industry or other accreditation(s)	16%
It has a high volume of face to face teaching hours	16%
The ratio of exams to coursework	12%
It was recommended to me	8%
Cost of course fees	7%
It has flexible hours and delivery	6%

Whilst this makes it clear that future employment potential is a significant factor in prospective student decision making, it can also be helpful to analyse how they feel about their employment prospects after they have graduated. By demonstrating the feelings of this audience with regards to their future careers, we hope to demonstrate that a university education is still seen by many as an effective tool in bolstering their career earnings and that their degrees are perceived to deliver a high return on investment in the long run.

We can build on this issue by analysing how optimistic prospective students are about their future careers and their time after graduating. When asked about this, two-thirds of this audience were optimistic about their employment prospects with only a small minority expressing a degree of pessimism when thinking about their future careers. The overwhelming sense of positivity from this audience implies that they are looking beyond the effects of the pandemic on the national economy and that they believe that by the time they come to graduate there will be a ready supply of entry level graduate jobs. It is also worth mentioning that from our International Student Survey, we know that less than half of all prospective international students looking to study in the UK are optimistic about their own economic prospects. This reiterates the strength of feeling amongst domestic students and the confidence they have in the domestic labour market when it comes to graduate employment.

Whether the graduate job market will be at full strength by that time remains to be seen, but there is a clear sentiment amongst prospective students at this time that they see their degrees as an effective tool to help them plan for the future. Universities need to appreciate this and adapt their communication strategies accordingly to reflect the importance that this audience places on the issue of graduate employment.

It is also worth mentioning that the optimism expressed by prospective students is largely reflective of the fact that they continue to see a university degree as being the best way to enhance their future career options. This is crucial when thinking about the issue of value for money in relation to a university education. In later sections we will look at this topic in more detail, where we analyse not just the attitudes of this audience to the cost of a degree, but also the future value of a degree.

How do you feel about your employment prospects after you graduate?

Total	21%	45%	24%	8%	1%

■ Very optimistic　■ Somewhat optimistic　■ Neutral　■ Somewhat pessimistic　■ Very pessimistic

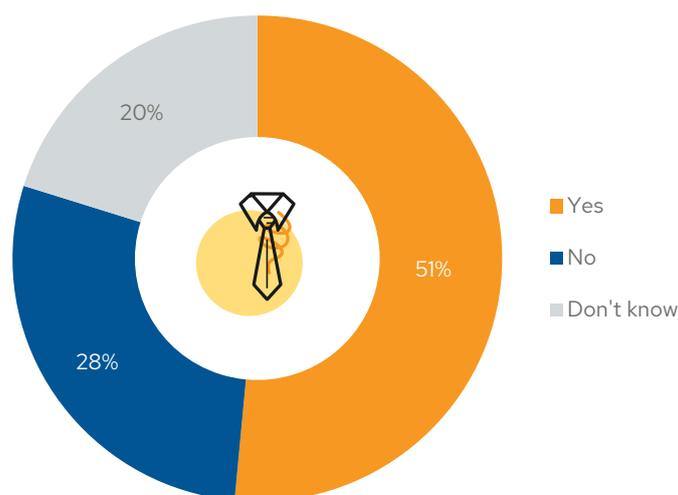# How can universities help prospective students plan for their careers?

We have already established that future career considerations are a top priority for prospective students when they begin their application process. From our work with students all over the world, we have demonstrated that this is a priority not just for domestic students but also for international students as well. Our most recent International Student Survey has highlighted that universities can enhance the attractiveness of their career planning offices by communicating the availability of services such as CV reviews and one-to-one meetings with careers advisers. Given the strength of domestic student sentiment on this issue, we can assume that these trends also hold true for domestic students as well as international cohorts. In this section, we will go one step further by looking at what universities can do to help students to plan their future careers before they have enrolled at an institution.

When asked whether they felt they received enough help in planning for their future careers whilst they were applying to go to university, encouragingly, over half claimed to have been given adequate assistance on this matter. This implies that universities and schools are able to communicate the right information to prospective students whilst they are still enquiring about different courses and that universities as a whole appreciate the importance that this audience places on graduate outcomes.

However, there are significant variations depending on which subject these prospective students were interested in studying. Perhaps unsurprisingly, those interested in studying Dentistry, Medicine and subjects allied to Medicine were most likely to claim they had been given an appropriate level of assistance, whilst those interested in studying Historical, Humanities and Mathematics subjects were least likely to claim they had been given the necessary information. It is important that universities and schools are able to reach a broad audience when it comes to career planning and that those interested in subjects with a less well-defined career path are also given the appropriate amount of assistance.

Further to this, over a quarter of all prospective students claimed they have not been given the help they require whilst still in the application stage. It is vital that universities and schools ensure that every student is given the right level of assistance so that they can make informed decisions with regards to the choices on their application and that they are not disadvantaged at a later date.

Do you feel that you got enough help in planning your future career when applying to university?

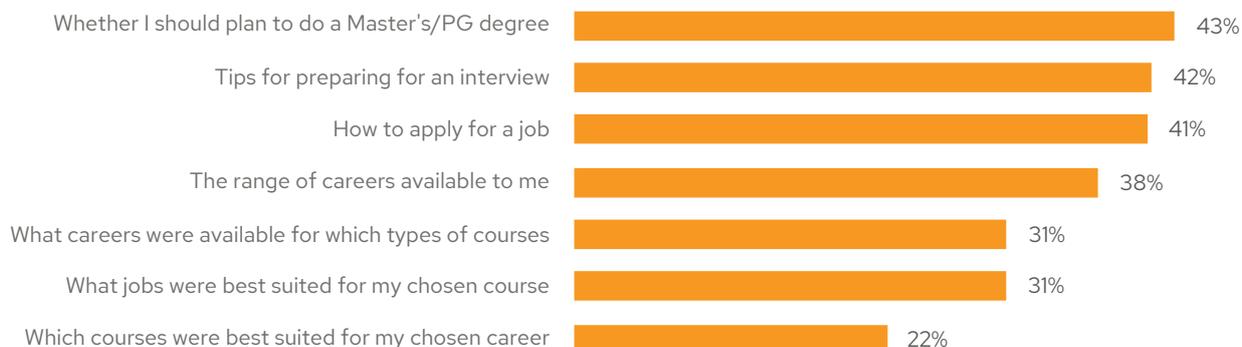20%

51%

28%

- Yes
- No
- Don't know

So, whilst universities appear to be implementing an effective strategy when it comes to communicating the suitable career options to prospective students, it is clear that some segments of students are being under-served. By highlighting those areas which prospective students would like more information on, we hope to provide universities with a more comprehensive guide to how they can help prospective students plan for their future careers and in doing so, help them to reach a variety of different student cohorts.

When prospective students were asked about what information they felt was lacking when they were making decisions on their application, the biggest factor was whether they should plan to do a postgraduate degree, with 43% selecting this option. This suggests that universities need to communicate more to students with regards to their options when considering postgraduate study and in particular highlight the benefits of undertaking a Masters, MBA or PhD. This is clearly an area which prospective students to undergraduate degrees feel an element of confusion around and would appreciate greater clarity on what options are available to them after their undergraduate studies, including how that would benefit them when planning their future careers.

Other areas which this audience feel are not communicated as effectively as they could be are tips for preparing for an interview and how to apply for a job with 42% and 41% selecting these options, respectively. This implies that prospective students see a greater role for career planning offices at universities in the application stage. By demonstrating they are able to support their students when applying for graduate level jobs, universities will benefit from making it easier to convert prospective students along the enquiry and enrolment pathway. They can do this not just by giving them tips for preparing for an interview, but also by offering to review their CVs before they are sent off to potential employers.

By assisting in multiple stages of the job application process, universities can help their students to articulate how the skills they have gained during their studies will help them be useful to their future employers. Whilst these activities will form a crucial part of the service that universities provide to their students, it is important to note that with tuition fees set as high as they are, universities will be expected to do more in the future to help them in a more comprehensive manner than they ever have before.

What information do you feel was missing?

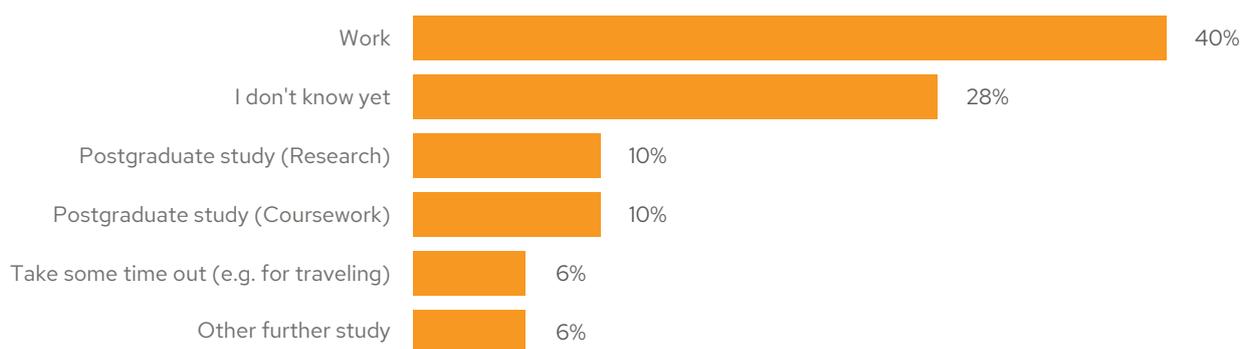|	
Whether I should plan to do a Master's/PG degree	43%
Tips for preparing for an interview	42%
How to apply for a job	41%
The range of careers available to me	38%
What careers were available for which types of courses	31%
What jobs were best suited for my chosen course	31%
Which courses were best suited for my chosen career	22%

What do prospective students plan to do after they graduate?

We have seen how prospective students prioritise their future career considerations and how universities can assist them with achieving their goals. Given the importance of this set of considerations in student decision making, it is then appropriate to look at the expectations of prospective students once they have graduated, not just in terms of what they want to go on to do, but also what they can expect to earn in their first job. We can follow up on this by examining how they go about choosing which employers they want to apply to and how universities can assist with this.

When asked what they plan to do after graduating, the most popular answer was to find work, with 40% selecting this option. It is also worth noting that at the point of applying for their degree, a fifth of all undergraduate prospects are considering postgraduate courses at that point in time (either by coursework or by research). It therefore also makes sense that information about how to apply for a master's or postgraduate degree is one of the perceived biggest knowledge gaps when it comes to planning for their future career, as we have seen in the previous chart. By educating their undergraduate prospects about their postgraduate options, universities can help this audience make fully informed decisions with regards to their studies.

It is also interesting to note that 28% are unsure about what they want to do after graduating, which represents a sizeable proportion of all prospective students. Whilst this is by no means the most popular answer here, by comparison, only 4% of prospective international students looking to study in the UK are unsure about what they want to do after graduating. This suggests that there is an opportunity for career planning services within universities to help prospective students with guidance and advice as to what their options are. Whilst it may be considered unsuitable to encourage all prospective students to have planned their long-term career goals before they have enrolled at a university, there remains a need for planning offices to provide additional support where necessary. By fulfilling the needs of their students, they can help them to add to the value of their degrees and plan for their lives after graduation.

What do you plan to do after graduating from your degree?

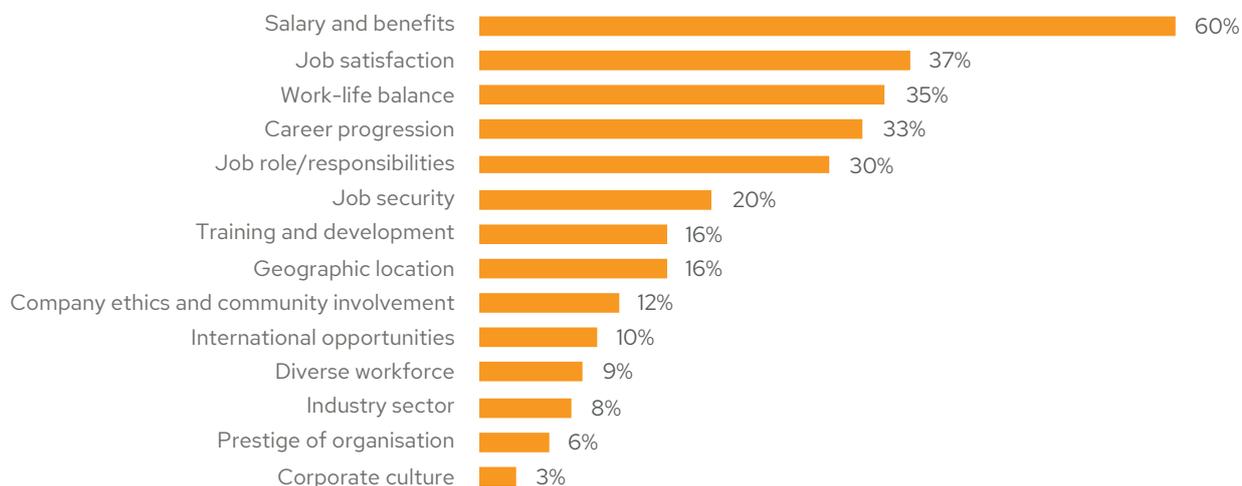|	
Work	40%
I don't know yet	28%
Postgraduate study (Research)	10%
Postgraduate study (Coursework)	10%
Take some time out (e.g. for traveling)	6%
Other further study	6%

Finally, we can look at which aspects of a job are most important to prospective students when they are considering future employment. By showing which elements are most important, we hope to be able to provide universities with a comprehensive guide to the types of employers they should be seeking to partner with and how they can best support their student cohorts.

When asked about this, unsurprisingly salary and benefits emerged as the most important priority when choosing an employer. It is important for universities and employers alike to appreciate the extent to which this determines student decision making and that its importance also ties in with their salary expectations. When asked how much they expected to be earning in their first year of full-time employment, on average prospective students expect to earn £23,900. Given that in reality, the current average graduate starting salary in the UK is just over £23,000[7], it seems that prospective students are well educated as to what they can expect to earn immediately after graduating. This means that graduates will have a more realistic appreciation of what constitutes a 'good' salary to them and will have a more comprehensive view of the value their degree can bring them in the short term.

Whilst salary expectations are important to the majority of prospective students, other factors are also seen as a priority. The second and third most popular answers were job satisfaction and a good work-life balance. This suggests that young people are increasingly aware of the dangers of burnout and that an imbalanced work-life structure can have a detrimental impact on their mental health. We have already seen that those looking to study at university see the importance of mental health support services whilst at university, and it is likely that they will carry these attitudes through their careers and lives after they have graduated. Those employers which demonstrate a pragmatic attitude with regards to the work-life balance of their employees will find it easier to attract university graduates, as this is one of their most significant priorities.

Lastly then, we can look at the importance of career progression and the extent of their job responsibilities. Around a third of all prospective students find these elements important, and this demonstrates a need for employers to be able to communicate the ways in which graduates can progress within their organisation. Those employers which can demonstrate a clear job role for graduates will benefit the most.

Please select up to three factors you consider when choosing an employer:

Factor	Percentage
Salary and benefits	60%
Job satisfaction	37%
Work-life balance	35%
Career progression	33%
Job role/responsibilities	30%
Job security	20%
Training and development	16%
Geographic location	16%
Company ethics and community involvement	12%
International opportunities	10%
Diverse workforce	9%
Industry sector	8%
Prestige of organisation	6%
Corporate culture	3%

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7 https://www.savethestudent.org/student-jobs/whats-the-expected-salary-for-your-degree.html

In summary

Universities are being challenged to support their student populations in more ways than ever before. From emotional support with regards to their mental health to greater assistance with their career planning, universities are undergoing a fundamental realignment on how they support their students throughout their time at university. A key tenet of this is the ability for universities to help their graduates find graduate-level, appropriate employment after they have finished their studies. Careers services will be at the centre of this readjustment and they will be expected to help their students into their desired job roles with the enthusiasm and optimism that young people exhibit here. The institutions which can effectively demonstrate their commitment to finding employment for their students will be the ones which ultimately benefit the most from attracting domestic students at a time when competition for these groups has never been higher.

Section 4 – Value for money for students

Key findings

- 34% are less likely to apply to university because of the amount they will have to pay (down from 39% in 2019)

- 26% would consider an online degree if it meant they received a discount on their tuition fees

- Prospective students see improving student accommodation, study facilities and workplace opportunities as the three biggest areas in need of additional investment

- Students are increasingly reliant on tuition fee loans to cover the cost of their tuition fees with over three quarters of prospective students now taking out a loan

Do prospective students think that a university degree offers value for money?

With many students still being taught entirely online and with potential confusion as to when face-to-face teaching will resume, there have been calls from within the sector for students to receive a partial refund or financial compensation in one form or another[8]. From paying full tuition fees while only being able to study online to little or no access to on-campus facilities and having to pay rent on accommodation which they cannot use, students have had to face a number of difficult financial decisions over the last year. Against a backdrop of these issues, it is important to consider the views of prospective students to see if they have influenced their perceptions of the value of a university education and how that might have affected their decision making.
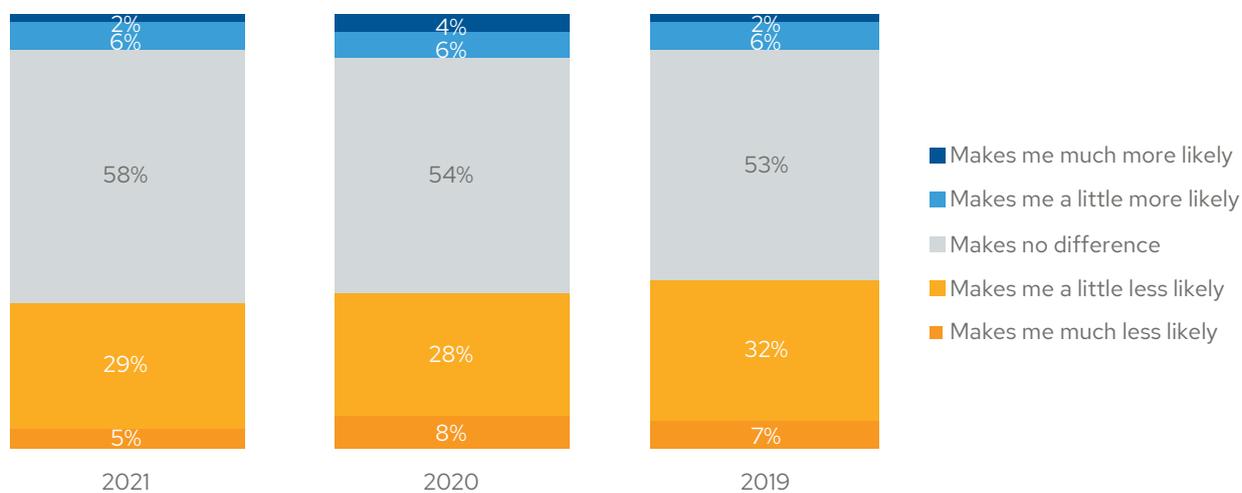
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8 https://www.bbc.co.uk/news/education-56285701

It is also important to consider the wider context of how the higher education sector will be funded over a longer period of time. Whilst debates about the amount that domestic students should pay in tuition fees continue, along with questions over how much the government should contribute to fund the sector, it is now more important than ever to evaluate the views of domestic students to see what they think of the current tuition fee system. With the news that applications from EU students to the UK may have declined by as much as 40% in the last year, leading to a predicted revenue loss of £62.5 million, universities are facing an uncertain future with regards to how much they can rely on student enrolments from the EU[9]. As a result, domestic students will be even more crucial to revenue streams for universities going forward.

The majority of domestic students will rely on tuition fee loans to finance their studies. With this in mind, when asked whether the amount they will have to pay to go to university affects how likely they are to apply, a third claimed to be less likely to apply after considering the costs involved. Whilst this does represent a significant proportion of potential students and suggests that for them, they might be prevented from going to university due to the financial burden placed on them by the current system of tuition fees, it is significantly less compared to previous iterations of the survey (39% in 2019). This suggests that successive years of prospective students are becoming gradually more accepting of the current level of tuition fees that they will have to pay and that they are increasingly likely to appreciate the long-term value of a university education.

It also suggests that prospective students are looking past the situation for current students who have had their university experience limited by lockdowns. Whilst they can see that for current students their experience is less than optimal, it has not made them any more likely to question the value of a degree for themselves. This is likely down to the fact they expect campus life to have largely returned to normal by the time they enrol at university in September and as such they expect to have the full experience both in terms of their academic studies and their participation in university life.

Does the amount you will have to pay to go to university affect how likely you are to apply?

Legend:
- Makes me much more likely
- Makes me a little more likely
- Makes no difference
- Makes me a little less likely
- Makes me much less likely

	2021	2020	2019
Makes me much more likely	2%	4%	2%
Makes me a little more likely	6%	6%	6%
Makes no difference	58%	54%	53%
Makes me a little less likely	29%	28%	32%
Makes me much less likely	5%	8%	7%

9 https://www.forbes.com/sites/nickmorrison/2021/02/09/uk-universities-face-financial-loss-as-brexit-hits-eu-student-numbers/?sh=148cea11e2a8

So, it seems that many prospective students do not need convincing of the value of a university education and that the current situation for students has not led them to question the cost of their degrees. However, this viewpoint is also dependent on them being able to return to university in September and to have full access to campus facilities and a predominantly face-to-face teaching experience. It is likely that without these elements, many prospective students would start to consider alternative options.

Given that online learning has become the dominant mode of delivery for the majority of students over the last year, it is important to consider the current level of interest in online study to see whether the coronavirus has had a lasting impact on student attitudes. When asked whether they would consider studying their degree online if it meant they would not have to pay as much in tuition fees, only a quarter of all prospective students would do so. There is, however, a great deal of confusion on the issue with nearly a third of this audience unsure whether they would consider this option.

The fact that only a relative minority would consider a cheaper, online degree suggests that they place a great deal of value on the face-to-face elements of their university education. This means it is essential that universities are able to prepare their campuses and teaching facilities adequately to allow students to return to campus in significant numbers. If they do not, then calls for a discount or financial compensation for students are likely to grow in number and intensity. It is clear that the current attitudes of students are based on the assumption that face-to-face teaching will form the dominant mode of delivery for their degrees. A large part of the value they assign to their education at this level is driven by the in-person interactions they can have both with teaching staff and with their peers.

It may come as no surprise that a discounted online education has not garnered significant interest amongst prospective domestic students. Our Coronavirus Student Survey has revealed similar attitudes amongst international students, with most of this audience in agreement that in the event that they cannot experience face-to-face teaching and instead will receive a predominantly online mode of delivery, then they would expect to receive a discount on their tuition fees. It is clear that they also place significant value on the face-to-face teaching environment. Furthermore, in previous iterations of our International Student Survey, we have highlighted that prospective students see the main benefits of an online education to be the flexibility it gives them in allowing them to work whilst also studying. By contrast the cost savings in an online education are very much a secondary perceived benefit, meaning that a discount may not be an be an effective method of attracting additional students.

Would you be interested in studying your degree online if it meant you would not have to pay as much in tuition fees?

26% Yes
44% No
30% Unsure
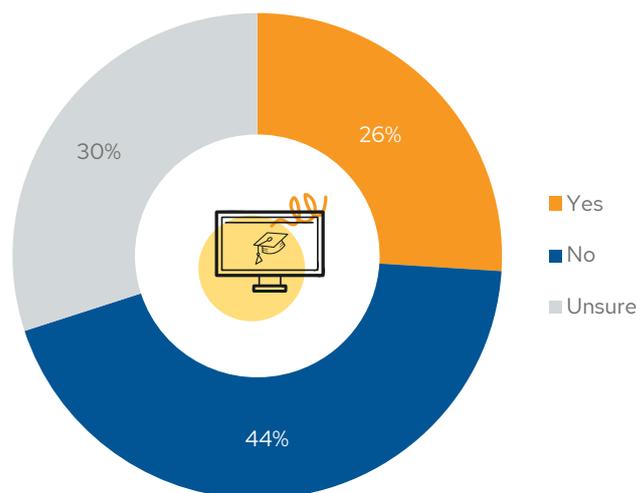
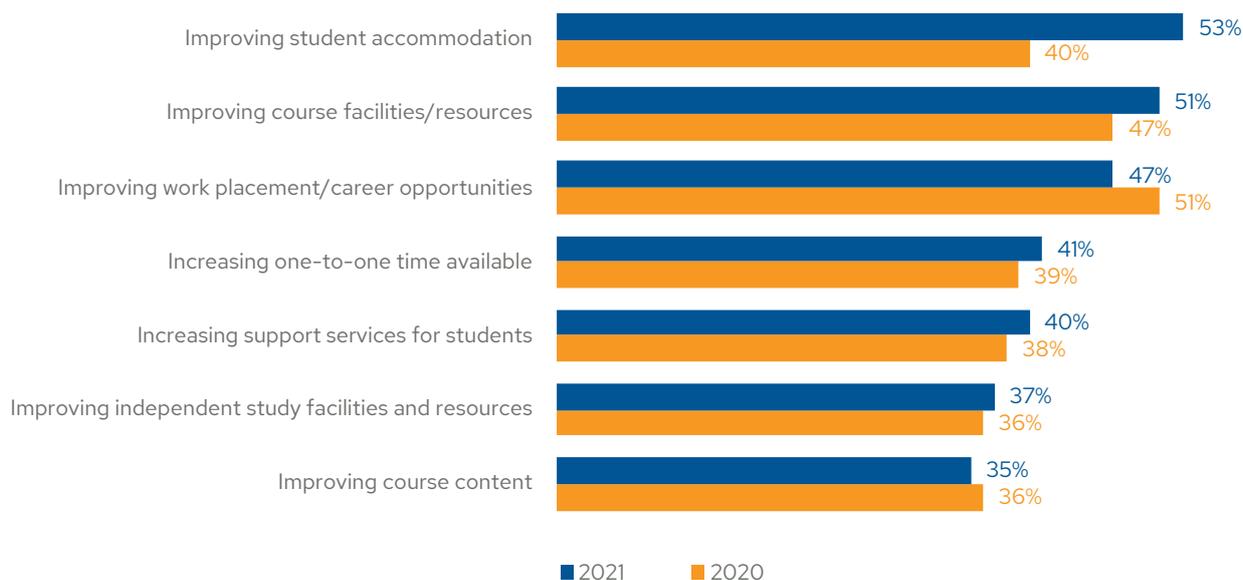# How can universities ensure that their students get the maximum return on investment during their studies?

The recent focus on the coronavirus and what that has meant for those at university has led many to question the value of the student experience and to analyse where this is lacking. It is important for universities to communicate how the investments they make can be of benefit to their student cohorts so that they are reassured that the money they pay in tuition fees will deliver the best possible student experience.

When asked where universities should invest their money to maximise the return on investment for students, the most popular answer was to improve student accommodation. Whilst student accommodation has consistently been a priority for those looking to study at university over the last few years, it is clear that the events of the last 12 months have placed this firmly in the spotlight. Given that many students have had to experience lockdown in their own Halls of Residence, often under less-than-ideal circumstances, it is unsurprising that the proportion who would like to see universities investing in their student accommodation has risen significantly in the last year. This has increased from 40% in 2020 to 53% in 2021 to become the area which is seen to be most in need of additional investment by students. It is clear that consistent coverage of students having to experience lockdown whilst in their own Halls of Residence has had an impact on the perceptions and attitudes of those looking to study at university next year, and that this coverage has led to a renewed focus on the quality of student accommodation.

The second most popular area seen to need extra investment was improving course facilities and resources. This reiterates that study facilities constitute an important part of how students judge their university and whether it delivers value for money for their education. Whilst the area of study facilities encompasses a broad range of issues which might need investment, the last year has seen many students deprived of many on-campus resources and facilities which they might have made use of if they were given the option to. It is likely that this has given many prospective students a renewed appreciation of the importance of physical study facilities and resources, hence why it remains an important area in need of investment. Indeed, when asked about the importance of various factors when choosing a university, the quality of university facilities (for example accommodation, sports and social elements) ranked as the second most important factor.

Another popular answer was improving work placement or career preparation opportunities for graduates. We have already shown that future career considerations are a significant priority for prospective students, so it follows that this would be an area where they would like to see additional investment from universities. By providing more tangible links between students and the industries they would like to work in, universities can better support their students and help them to prioritise the career benefits a university degree will give them.

What five areas do you think universities should invest in to maximise your return on investment from tuition fees?

Area	2021	2020
Improving student accommodation	53%	40%
Improving course facilities/resources	51%	47%
Improving work placement/career opportunities	47%	51%
Increasing one-to-one time available	41%	39%
Increasing support services for students	40%	38%
Improving independent study facilities and resources	37%	36%
Improving course content	35%	36%

■ 2021 ■ 2020

The Department for Education recently announced that tuition fees would be frozen at the maximum £9,250 per year for domestic students. Combined with the news that any longer-term decision on a reduction in tuition fees would be delayed until the next spending review, it is important to look at how prospective students intend to fund their education at university and to what extent they rely on tuition fee loans to do so[10].

When asked about this, over three-quarters of all prospective students say they intend to use tuition fee loans to pay for their tuition fees. Whilst prospective students are not quite as reliant on loans to cover their living costs, it is clear that debt-financing is the most widely utilised route to access a university education. Only a relative minority of students say they will be able to rely on their families or any income derived from working whilst also studying.
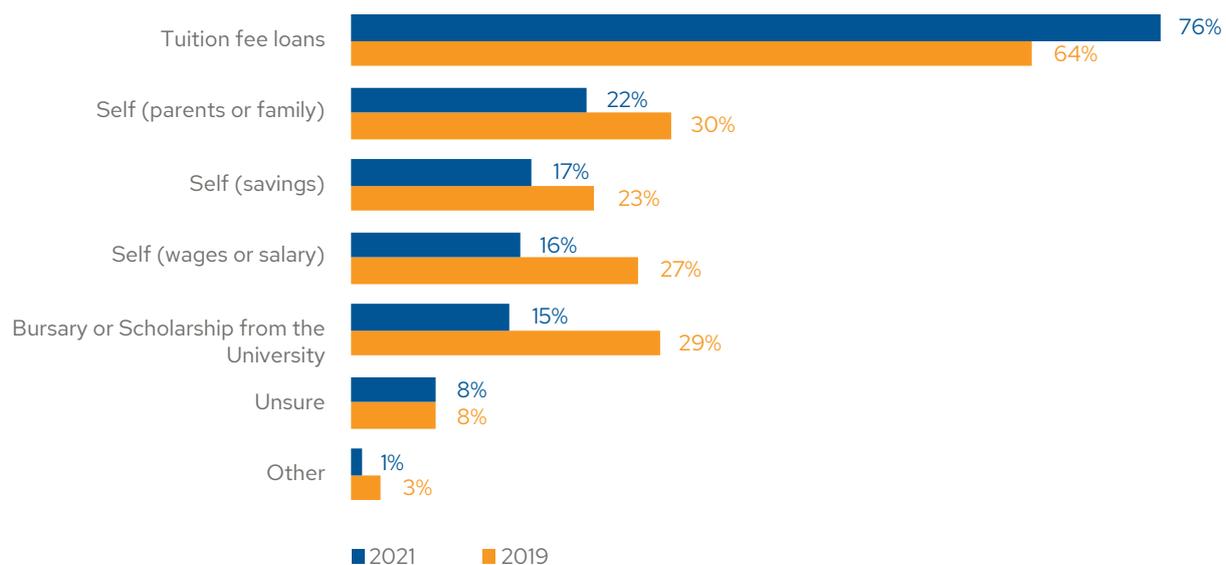
With the debate about how much of any given student loan is expected to be repaid in the long term, and further discussions around how to classify and allocate the resultant unpaid debt, it is important that those within the sector are aware of how many prospective students are reliant on tuition fee loans to fund their studies. By contrast, our 2019 iteration of the survey showed that only 64% of prospective students claimed they would be using tuition fee loans to cover the cost of their tuition fees. This significant increase in the use of loans is consistent with government estimates of the amount of student debt and the amount lent to students in recent years[11].

Whilst this trend does not appear to have influenced prospective students' opinions of the value of their university education, it nevertheless underscores the importance of universities allocating their resources effectively and investing to ensure the student experience reflects the amount they have to pay for it.

10 https://www.gov.uk/government/publications/post-18-education-and-funding-review-interim-conclusion
11 https://commonslibrary.parliament.uk/research-briefings/sn01079/

What sources of funding will you use for your tuition fees?

Source	2021	2019
Tuition fee loans	76%	64%
Self (parents or family)	22%	30%
Self (savings)	17%	23%
Self (wages or salary)	16%	27%
Bursary or Scholarship from the University	15%	29%
Unsure	8%	8%
Other	1%	3%

■ 2021   ■ 2019

What sources of funding will you use for your living costs?

Source	2021	2019
Maintenance loan (means tested)	49%	47%
Self (parents or family)	30%	43%
Self (wages or salary)	28%	43%
Self (savings)	24%	34%
Unsure	18%	8%
Other	2%	3%

■ 2021   ■ 2019
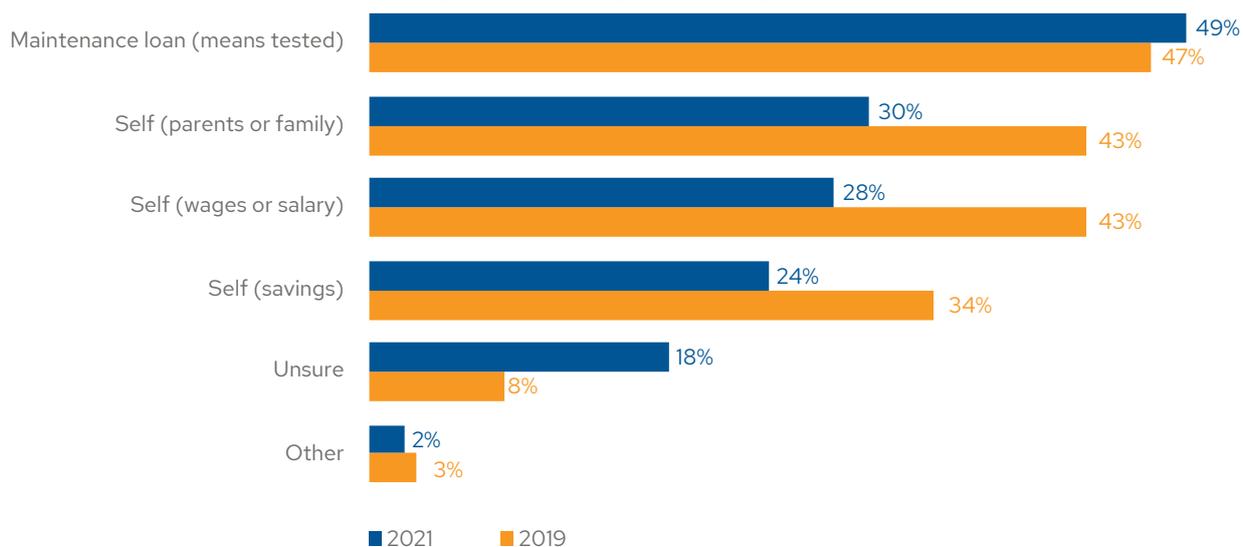
In summary

The debate around how best to fund the higher education sector in this country shows no signs of being resolved quickly. Against this backdrop, it is clear that students are increasingly convinced of the value of a university education to their future careers, however, this is with the caveat that it comes with access to a range of on-campus facilities and involves face-to-face teaching. Faced with this prospect, universities must ensure they are investing their resources and income effectively to adequately support their student populations and help them to maximise their return on investment.

Section 5 - Communicating with prospective students

Key findings

- 45% claim it is either 'extremely' or 'very' important that a university personally responds to their enquiries within 24 hours of submitting them

- Only 23% of prospective students received a personalised response to their enquiry within 24 hours of submitting it

- Email and real-time chat are the preferred channels to use to submit an enquiry to a university, with 67% and 48% opting for these channels respectively

- YouTube and Instagram are the most popular social media channels for researching universities amongst prospective students
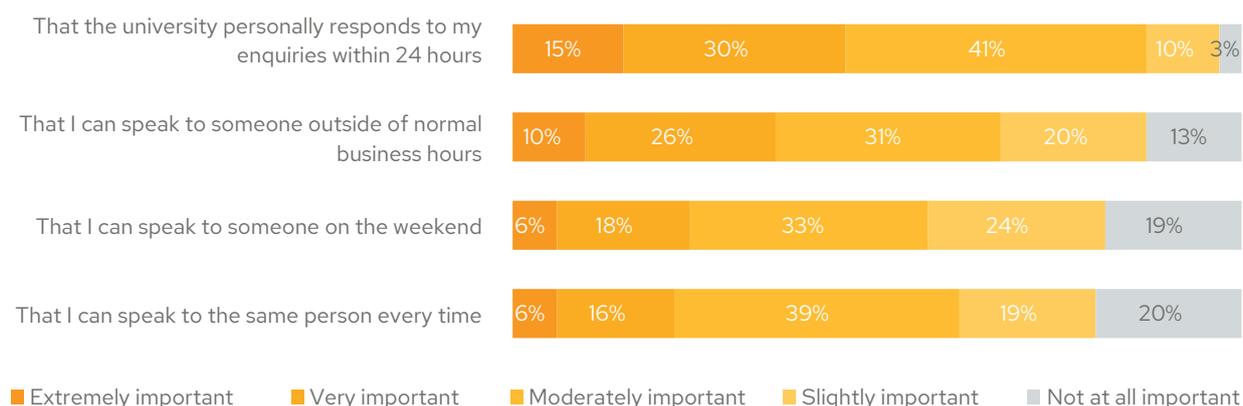
How important is it for universities to respond quickly to prospective student enquiries?

Prospective student expectations are changing when it comes to communicating with universities. The increase of instant messaging technologies coupled with the prominence of social media in all aspects of everyday life has fundamentally transformed the ways in which individuals and organisations communicate.

Against this backdrop, it is important to analyse the underlying attitudes of prospective students when communicating with universities, so that universities can appropriately allocate their resources and ensure their prospects receive timely, accurate answers to their queries. When asked about the various importance of different aspects, 45% claimed it was either 'extremely' or 'very' important that a university responds to their enquiry within 24 hours with only 3% claiming it was not important at all. At a time when the situation with regards to coronavirus restrictions is changing rapidly, it is vital that universities are able to respond to student enquiries in a comprehensive and time-sensitive manner. Those universities which take too long to respond to an enquiry will run the risk of alienating their prospective students, especially given the stresses placed on this audience.

Additionally, 36% claimed it was either 'extremely' or 'very' important that they are able to speak to universities outside of normal working hours, with the vast majority assigning some degree of importance to this issue. This reiterates the importance of universities investing in enquiry management systems to be able to communicate with their prospective students. However, this also presents a significant challenge for universities, as doing so requires a considerable amount of time and resources. Those that do will benefit significantly by having a more efficient and effective conversion strategy which is able to move enquirers through the application process and onto enrolment.

When communicating with a university about an enquiry or application, how important are the following?

Category	Extremely important	Very important	Moderately important	Slightly important	Not at all important
That the university personally responds to my enquiries within 24 hours	15%	30%	41%	10%	3%
That I can speak to someone outside of normal business hours	10%	26%	31%	20%	13%
That I can speak to someone on the weekend	6%	18%	33%	24%	19%
That I can speak to the same person every time	6%	16%	39%	19%	20%

■ Extremely important   ■ Very important   ■ Moderately important   ■ Slightly important   ■ Not at all important

The importance that prospective students place on timely responses to their enquiries is of some concern, given that their expectations of universities are relatively low in this regard. When asked when they would expect to receive a 'complete and personal' response to their enquiry, only 7% thought they would receive a response within 24 hours. Whilst 56% of prospective students expect to receive an acknowledgement that the university has received their enquiry (through an auto-generated process) within 24 hours, their expectations are significantly lower when it comes to universities responding on a more personal basis. This suggests that whilst it is important for prospective students to receive a full response to their enquiries within 24 hours, they have very low expectations of universities to deliver on this.
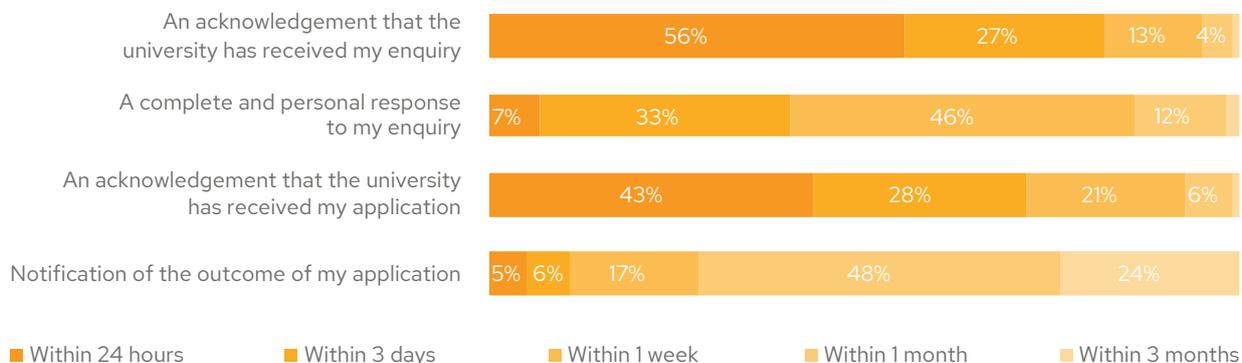
When it comes to submitting applications, 43% expect a response within 24 hours that the university has received the application, however 48% expect a final decision on their application to take up to one month. Universities need to ensure they have the capabilities to process student applications within that time frame, otherwise they run the risk of alienating their prospective student audiences.

Interestingly, when asked about the last time they enquired at a university, 23% received a personalised response within 24 hours. This suggests that whilst prospective student expectations of universities are relatively low, their experience is somewhat better. However, with 35% claiming it is 'extremely' or 'very' important to receive a response in 24 hours, it is clear that neither expectations nor experience are close to matching the importance they place on this issue. This reiterates the need for universities to invest in tools and strategies to become quicker and more responsive when dealing with enquiries from prospective students.
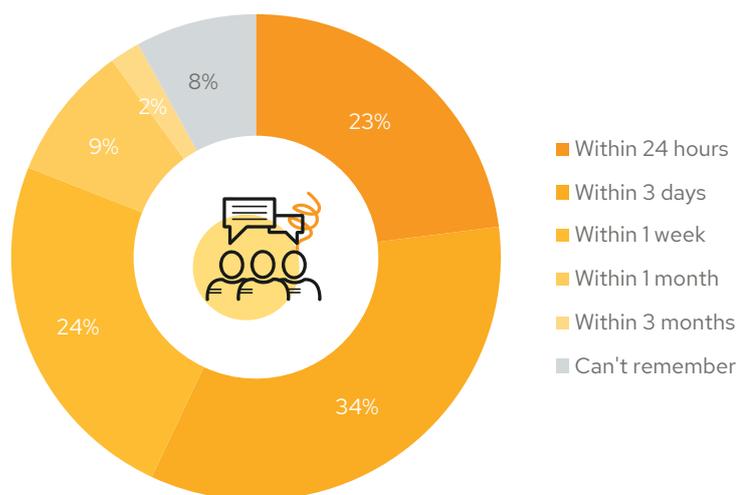
Finally, it is important to consider the frequency with which universities communicate with their prospective students. 43% of prospective students expect either daily or weekly communication from a university after making an enquiry, rising to 44% after applying to a university and 57% after they receive an offer. This demonstrates that prospective students expect frequent communication from universities at the start of the enquiry process. It also reiterates that universities should not be overly

concerned about frustrating their prospects with frequent communications. Instead, they should focus on having the most relevant information on the desired subjects and have the capabilities to communicate these to prospective students on a regular basis. At a time when government guidelines can change on a weekly basis with regards to the coronavirus, such campaigns will be appreciated and valued by prospective students.
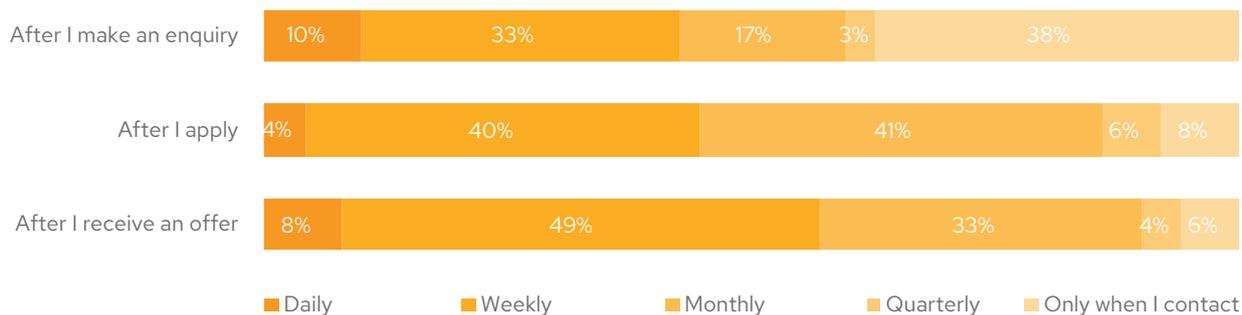
How quickly would you expect to receive a response from a university at each of the following stages?

	Within 24 hours	Within 3 days	Within 1 week	Within 1 month	Within 3 months
An acknowledgement that the university has received my enquiry	56%	27%	13%	4%	
A complete and personal response to my enquiry	7%	33%	46%	12%	
An acknowledgement that the university has received my application	43%	28%	21%	6%	
Notification of the outcome of my application	5%	6%	17%	48%	24%

- Within 24 hours
- Within 3 days
- Within 1 week
- Within 1 month
- Within 3 months

Thinking back to the last time you made an enquiry at a university, how long was it before they personally responded to you?

Within 24 hours: 23%
Within 3 days: 34%
Within 1 week: 24%
Within 1 month: 9%
Within 3 months: 2%
Can't remember: 8%

- Within 24 hours
- Within 3 days
- Within 1 week
- Within 1 month
- Within 3 months
- Can't remember

How often would you expect a university to contact you at each of the following stages?

|	Daily	Weekly	Monthly	Quarterly	Only when I contact
After I make an enquiry	10%	33%	17%	3%	38%
After I apply	4%	40%	41%	6%	8%
After I receive an offer	8%	49%	33%	4%	6%

What platforms do prospective students want to use to communicate with universities?

It is important to gauge the role of well-established communication channels alongside that of social media when universities are interacting with prospective students.

When asked about the importance of communicating with universities via their preferred platforms, 46% claimed it was either 'extremely' or 'very' important that they can communicate with a university via their preferred platform, whilst only 7% claimed it was not at all important. This suggests it is important that universities have a presence on a wide variety of platforms in order to communicate with their prospective students via as many different touchpoints as possible. Not only will this reassure their prospective student audiences that they value them, but it will also maximise the chances of them being able to respond to their enquiries in a timely manner.

When communicating with a university about an enquiry or application, how important is it that you can communicate using your preferred platform?

- Extremely important — 13%
- Very important — 33%
- Moderately important — 34%
- Slightly important — 13%
- Not at all important — 7%
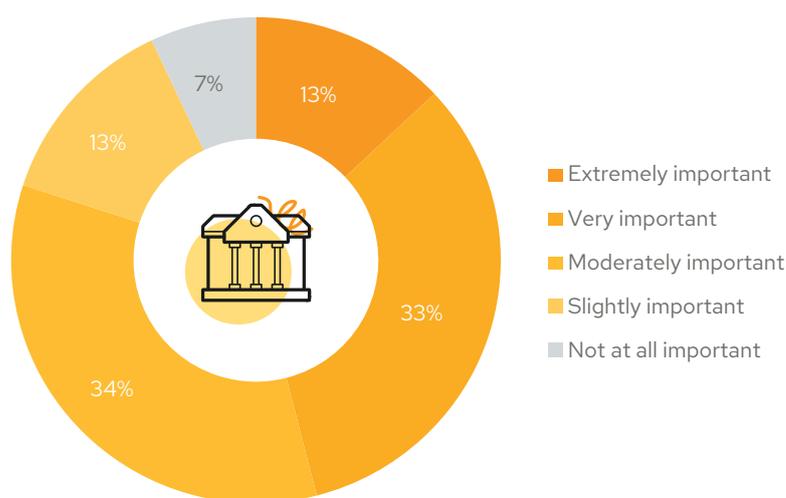
When asked which channels they would like to use to communicate with a university, 67% would like to use email when making an enquiry, 43% after making an enquiry, 52% after applying, 55% after they have received an offer and 49% after accepting an offer. Email is the most popular communication channel at each stage of the enquiry and application journey, and for some it is the only channel they would like to use to communicate with a university. This is because email remains the most trusted channel for prospective students and one where they can be sure to receive a reliable and informed response. The overwhelming preference for email here suggests that whilst other channels across social media are increasingly competing for additional investment and resources from universities, it should not come at the expense of email, which remains the first-choice option for most prospective students.

Real-time chat is another popular option for prospective students, with 48% opting to use this to make an enquiry and 21% after they have made an enquiry. This reiterates the importance of universities providing this functionality on their website and students being able to easily find this. It is also worth bearing in mind that most of those who do use real-time chat are likely to be in the initial stages of researching which courses and subjects they would like to apply for, and their enquiries are more likely to relate to these topics.

Finally, it is also worth considering the prevalence of using post as a communication channel. Whilst only a minority would prefer to use post in the enquiry stage, with only 11% opting to use it to make an enquiry and 9% after an enquiry, it is a significantly more popular option when receiving and accepting an offer, with 31% and 29% opting to use it in these stages. It is clear that post is only seen as a preferable communication channel in the latter stages of the application cycle when offer letters are issued.

Which stages would you like to use each of these channels when communicating with a university?

Email   Real-time chat   Phone call   SMS/text   Post
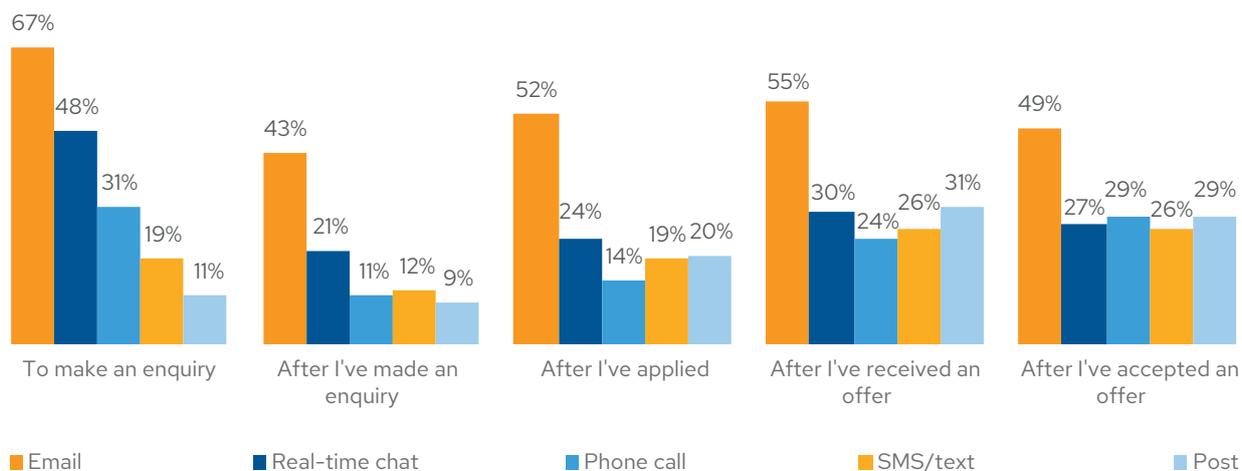
What social media platforms should universities use to communicate with students?
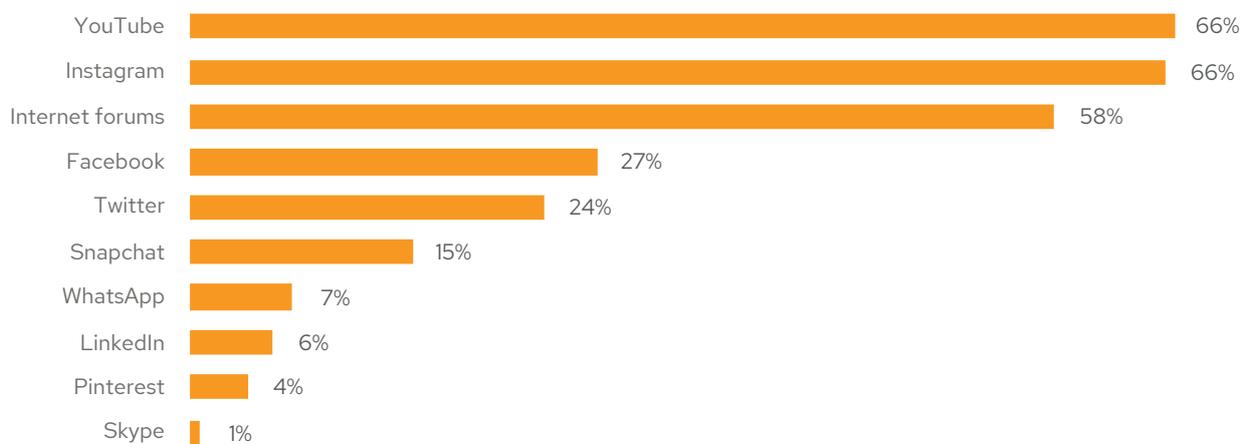
The proliferation of social media channels amongst prospective students in recent years has seen their respective value to universities exponentially increase. Universities need to invest their resources accordingly to ensure they can communicate effectively with prospective students, who, as the most likely audience to become early adopters of new platforms, will be at the forefront of any new trends.

According to our results, 83% of all prospective students will use social media to research universities at some point during the enquiry and application process. It is clear that social media now forms an integral part of the research that many prospective students will do. When asked which platforms they use to research universities, 66% claim they would use YouTube, with the same figure reported for Instagram. It is clear that these two platforms should form the building blocks for universities when thinking about their social media presence and their usefulness in communicating their attributes should not be underestimated.

Additionally, 58% will use internet forums when researching universities. As a follow up, we asked those students who do use internet forums exactly which ones they found most useful; 89% claimed to use The Student Room and 33% claimed to use Quora. This reiterates that not only is it important for universities to have an active presence on key social media platforms like Instagram and YouTube, but they also need to consider how much their prospective student audience will value peer-to-peer interactions on internet forums and how they can influence their decision making. The opinions of their peers can often outweigh anything that might be communicated to them via formal channels from the universities themselves. Therefore, it is important that universities are aware of how their institution is represented on internet forums and take steps to act on any issue they see arising in those discussions.

Facebook is decreasingly likely to be used by prospective students with only 27% opting to use it this year, compared to 40% in 2020. It is clear that whilst Facebook is still widely used at an international level, amongst a domestic audience is less likely to form part of their everyday social media activities. Universities need to be able to tailor their social media strategy according to their audience, study level and nationality in order to target users with relevant and engaging content.

Which of the following types of social media and messaging services do you use to research universities?

| Platform	Percentage
YouTube	66%
Instagram	66%
Internet forums	58%
Facebook	27%
Twitter	24%
Snapchat	15%
WhatsApp	7%
LinkedIn	6%
Pinterest	4%
Skype	1%

When asked at which stages they would like to use social media channels to communicate with universities, 57% claimed to prefer to use internet forums to make an enquiry. This reiterates the importance of internet forums in the initial stages of the enquiry and application journey for prospective students. Universities need to be aware that enquiries made on internet forums are likely to be broader questions made by those who are yet to decide on their preferred course or subject.

For those who use YouTube, 37% will use it to make an enquiry, with 37% also using it after they have applied to a university and 39% using it after they have received an offer. This suggests that not only is YouTube content used to help make decisions around which subject and university prospective students will consider in the initial stages, but it is also used in the latter stages of the application cycle as well. This audience will use YouTube to help them make a final decision on a university as to whether they would like to accept their offer or not. It is important that universities tailor their content on this platform to reflect these priorities and focus specifically on why prospective students with offers should choose their institution.

A similar trend is observed for Instagram, in that 34% of those who use the platform would like to use it to make an enquiry and 32% prefer to use it after they have received an offer from a university. Universities need to ensure that their content on this platform serves a multitude of purposes and helps prospective students who are in the initial stages of making enquiries about universities but also those in the latter stages of the cycle who are in the process of accepting an offer from a university.

Which stages would you like to use each of these channels when communicating with a university?

Legend: ■ Internet forums ■ YouTube ■ Twitter ■ Facebook ■ Instagram
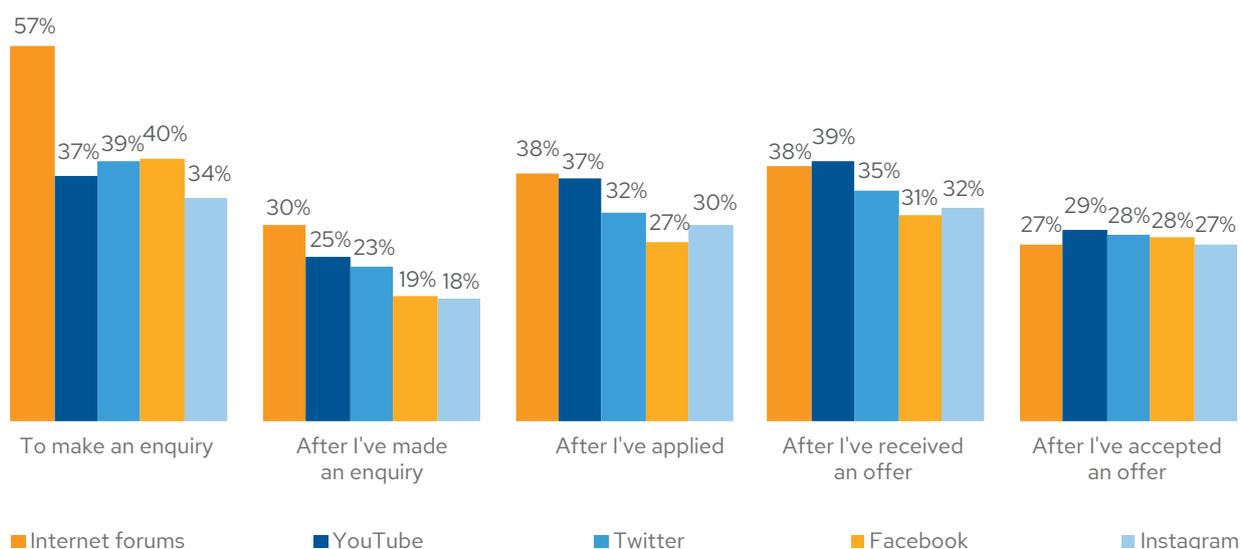
In summary

Social media has driven the desire for instant, personalised communication with universities and for them to be able to maintain a constant dialogue with their prospective students. To meet this level of demand, universities need to invest appropriately in their communication strategies. The importance of a timely, personalised response to prospective student enquiries cannot be understated and it is currently an area in which they feel they are being underserved. Most universities fail to match student expectations on this issue, so it is vital that they invest in their enquiry response strategies to be able to respond to those enquiries within the 24-hour window that is deemed important, offering superior customer service at a key stage in the decision-making journey.

Section 6 - The student journey

Key findings

- Only 12% of prospective students are aware of the new Turing Scheme, but after explaining to them what it involves, there is significant interest, with 44% claiming to be likely to take part

- Interest in using Clearing as a route to university has declined significantly in the last year, falling from 15% in 2020 to 7% in 2021

- The most sought-after topics of information with regards to Clearing is how it works and when it opens

- For those interested in Clearing, there is significant demand for additional information in the days and weeks following results day that would help them to complete the enrolment process
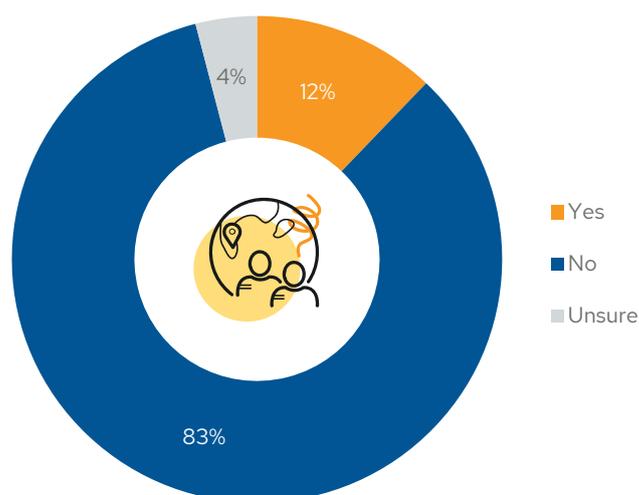
What are current levels of awareness and intention to use the Turing Scheme?

Following the UK's departure from the EU, it was announced that the UK would no longer be participating in the Erasmus+ Programme on 24 December 2020. In its place, the Government announced a new programme called the Turing Scheme. The scheme will be supported with £110 million in funding and it aims to support 35,000 participants in exchanges around the world[12]. With the scheme recently having opened for bids from institutions, it is worth gauging awareness and intention to use the scheme amongst prospective domestic students here in the UK to inform where its priorities should lie over the coming months.

When asked about this, only 12% of all prospective students claimed to have heard of the Turing Scheme with the majority unaware of the replacement to Erasmus+. Given that fieldwork for this survey began on the 11 January 2021, it may be unsurprising to see that awareness of the scheme is currently so low as it had only recently been announced to the public. Nevertheless, it is clear that the short-term goals of the programme should focus on raising awareness amongst students if it is to achieve its goals of supporting 35,000 participants in exchanges worldwide.

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12 https://commonslibrary.parliament.uk/research-briefings/cbp-9141/

Before today, were you aware of the proposed replacement Turing Scheme?
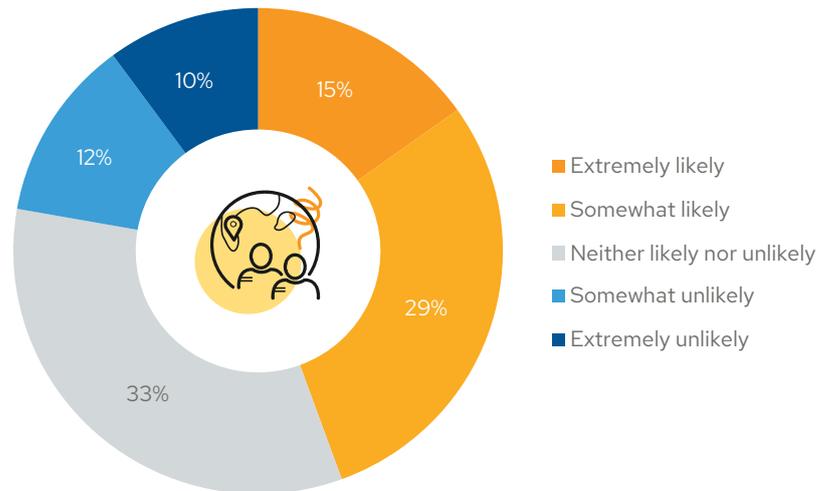

Yes
No
Unsure

12%
4%
83%

Whilst awareness of the scheme is admittedly significantly higher amongst postgraduate prospects, with 19% of this audience aware of the scheme, compared to only 12% for undergraduate prospects, any efforts to raise awareness should focus on raising awareness across multiple student cohorts. This will require input and actions from the government and stakeholders across the higher education sector, requiring them to work together if the replacement scheme is to be deemed a success. A co-ordinated marketing effort is the best way to raise awareness at this time to ensure maximum reach and coverage.

Any efforts to raise awareness and engagement with the Turing Scheme stand to be well received, as there is considerable interest in taking part amongst prospective students. Once aware, when asked how likely they would be to take part in the scheme, 44% claimed to be either 'extremely' or 'somewhat' likely to do so. This suggests that whilst awareness of the scheme is relatively low, when the main features are explained to prospective students, the fundamental concept holds significant appeal amongst this audience.

This is strengthened by the fact that amongst the 12% who are already aware of the Turing Scheme, their likelihood to take part is significantly higher, with 54% claiming to be either 'extremely' or 'somewhat' likely to take part. This reiterates the notion that raising awareness of the scheme is the easiest and most direct way to increase interest. The data from this survey suggests that interest in the scheme is not limited to those who are interested in studying any particular subjects, nor is it limited to those of any specific socio-economic background. It therefore stands to reason that the focus should be on raising awareness and interest across all demographics of prospective students as their engagement is not likely to be limited to any one identifiable group of individuals.

How likely would you be to take part in the Turing Scheme as part of your studies at university?

- Extremely likely — 15%
- Somewhat likely — 29%
- Neither likely nor unlikely — 33%
- Somewhat unlikely — 12%
- Extremely unlikely — 10%

In our most recent International Student Survey, we highlighted the importance of Erasmus+ to EU students looking to study in the UK and suggested that 31% of them would be less likely to study in the UK in the event of the UK withdrawing from the programme. Now that the UK has ended its participation in Erasmus+ and the news that this has coincided with a 40% decline in student applications from the EU, it is clear that there is a definitive need for an effective alternative. Whilst awareness of the Turing Scheme remains relatively low, this is likely to have a detrimental impact on the ability of UK universities to build partnerships with other institutions worldwide. It is vital that engagement with the scheme builds quickly in order to ensure that the UK sector remains a global leader in higher education.

How many prospective students are considering using Clearing to get into university?

The number of school leavers who were using Clearing had steadily increased in recent years. Despite the impact of the coronavirus on the university experience, record numbers found a place through Clearing in 2020. However, it is important to gauge intentions to use Clearing amongst the next intake of prospective students to see whether these fears around the coronavirus may have impacted the student decision-making process in that regard.

When asked about this, only 7% of all prospective students claimed they had considered using Clearing to get a place at university in 2021. This represents a significant decline compared to the previous year, when 15% of this audience were considering Clearing. This might potentially mean that demand for places through the Clearing scheme will be reduced this year, as students appear to be less willing to rely on a comparatively insecure method of gaining admittance to a university, in a year which has already brought a high level of uncertainty with regards to admissions. Universities need to be aware of this and plan their Clearing strategies and expectations accordingly.

Have you considered only using Clearing to get a place at university and bypassing the normal application process with UCAS?

Legend:
- Don't know
- No
- Yes

2020: Don't know 14%, No 71%, Yes 15%
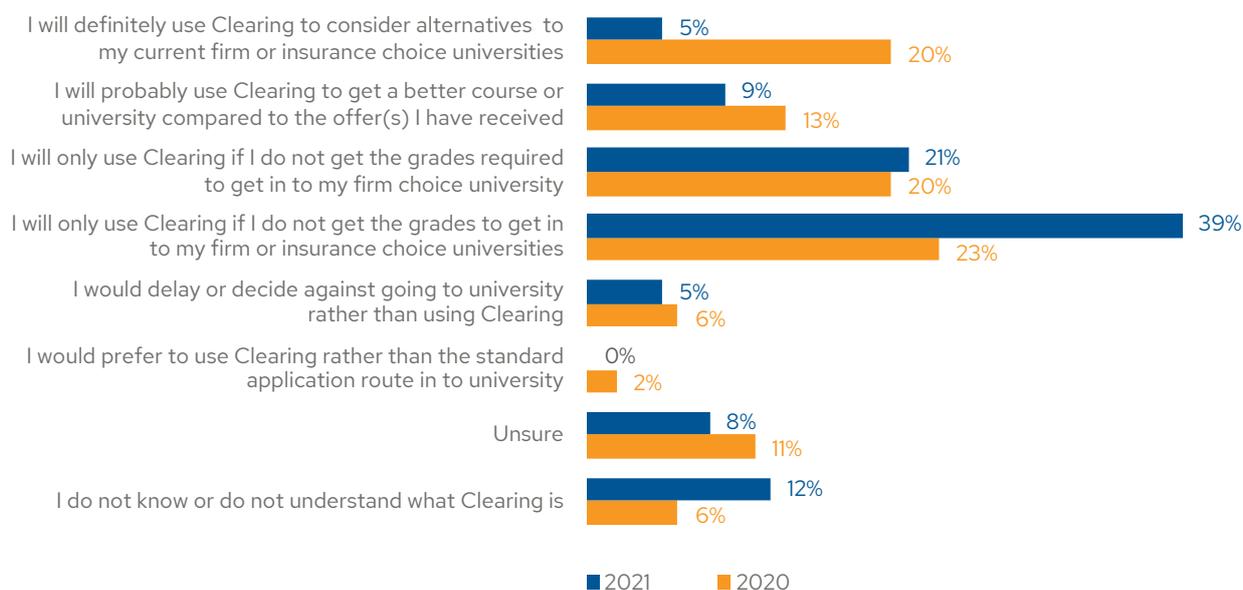2021: Don't know 18%, No 75%, Yes 7%
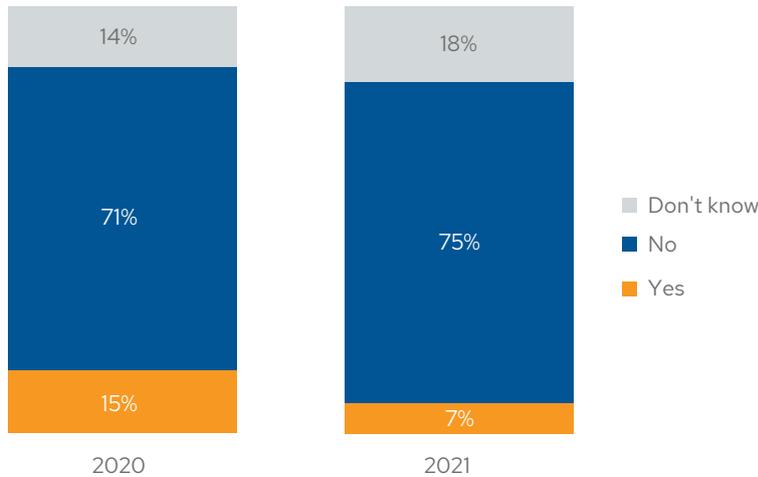
This notion is reiterated when prospective students are asked about their attitudes towards using Clearing. In 2021, 14% would 'definitely' or 'probably' consider using Clearing to explore alternatives or 'better' courses to their firm or insurance choice universities. Again, this represents a significant decline compared to 2020, when 33% would consider Clearing for alternative options to their current offers. It is clear that prospective student intentions have been significantly altered when it comes to Clearing and that the coronavirus has limited the proportion who would consider using it to gain a place in an alternative or 'better' university than the ones they had previously applied to. This suggests that prospective students are less opportunistic than those of previous years and that if they meet the required grades for their firm or insurance choice university they are potentially more likely to accept in 2021.

By contrast, the proportion who would only use Clearing if they did not get a place in either their firm or insurance choice universities has significantly increased from 23% in 2020 to 39% in 2021. It is clear that the coronavirus has led to many prospective students seeing Clearing as more of a last resort when it comes to finding a place at university. We have already covered how the job market for young people has been more heavily affected by the coronavirus than other age groups, therefore it makes sense to see a significant increase in those who explore every option available to them in order to take a place at university this year. It is also likely that with an enhanced appeal process for prospective students this year (owing to the cancellation of formal A-level exams), they are potentially more concerned with achieving their required grades through the appeals process, as opposed to using Clearing to gain admittance to a university that way.

There is also a growing contingent of prospective students who do not know or understand what Clearing is. In 2021, 12% of this audience claimed not to understand what Clearing is, rising from 6% in 2020 and from 3% in 2019. This appears to be a growing trend with prospective students increasingly unclear about what Clearing is and what would be required to go through this process. Universities and schools need to ensure that prospective students are made aware of all their options for being accepted at a university so that they can make informed decisions with regards to their applications and plans for their future careers.

Which of the following best describes your attitude to using Clearing to get in to university?

Attitude	2021	2020
I will definitely use Clearing to consider alternatives to my current firm or insurance choice universities	5%	20%
I will probably use Clearing to get a better course or university compared to the offer(s) I have received	9%	13%
I will only use Clearing if I do not get the grades required to get in to my firm choice university	21%	20%
I will only use Clearing if I do not get the grades to get in to my firm or insurance choice universities	39%	23%
I would delay or decide against going to university rather than using Clearing	5%	6%
I would prefer to use Clearing rather than the standard application route in to university	0%	2%
Unsure	8%	11%
I do not know or do not understand what Clearing is	12%	6%

■ 2021 ■ 2020

What are prospective students' current level of understanding of how Clearing works?
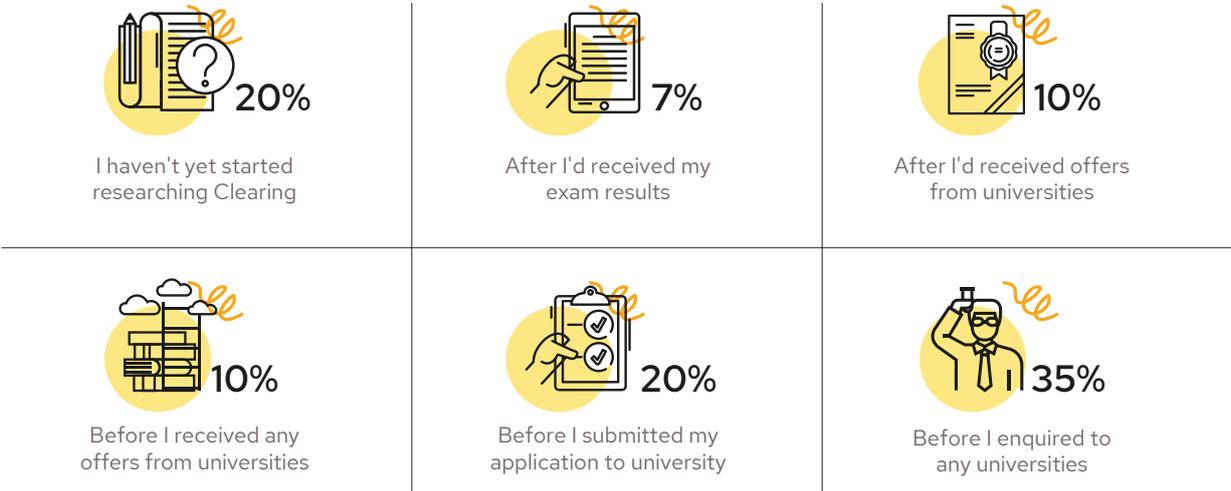
With an increasing number of prospective students unclear of how Clearing works and only considering this option if they do not get the required grades for their chosen institutions, it is vital to gauge the current level of understanding of how the process works and what is required of them.

Of those who do consider Clearing as an option, 46% of this audience started researching the process before they had submitted their application to university, 30% started researching after they had submitted their application and the remaining 24% had not started their research at all. This suggests that whilst prospective students are relatively divided in terms of when they begin researching the Clearing process, for many of this audience, their research will begin many months before they receive their exam results. Universities need to be prepared to assist their prospective students from a relatively early point in the enquiry and application cycle, long before Clearing actually opens.
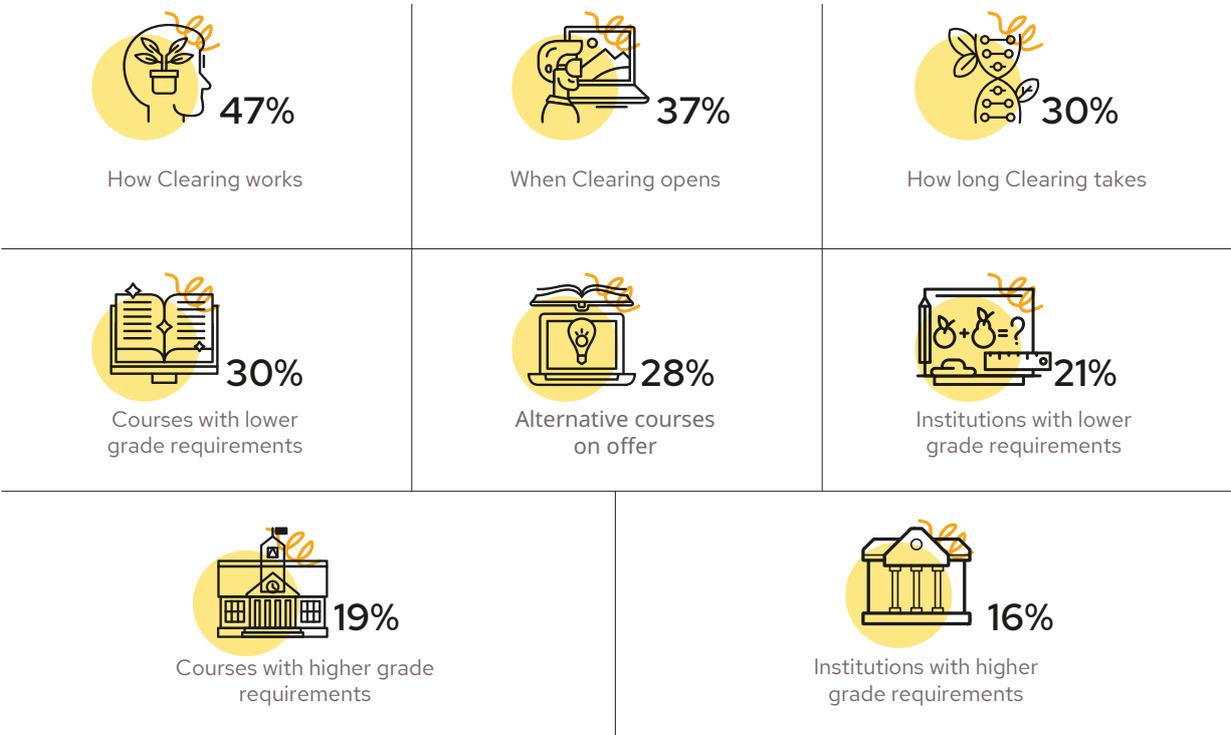
When asked what information they looked for with regards to Clearing, the most popular answers concerned the basics of how the process works, which in theory are easy for universities to answer; 53% wanted to know how it works, 45% wanted to know when it opens and 32% wanted to know how long it takes. Whilst it is easy to communicate this information, it reiterates that the most pressing issues for prospective students are around the most basic issues with regards to Clearing. Beyond these basic issues, the next most popular topics were alternative courses on offer, and finding courses and universities with lower grade requirements, with 30%, 27% and 20% selecting these options respectively.

This suggests that for a significant proportion of those who do consider Clearing, they are thinking about specific points of the application process and what actions they will need to take in the event that they do not get the grades they require. Universities need to ensure that not only are they able to answer the most basic questions about Clearing, but also that they have comprehensive and up-to-date information on which courses are going to be most appropriate for those applicants progressing through the Clearing process.

When did you first start researching how to go about using Clearing?

20%
I haven't yet started researching Clearing

7%
After I'd received my exam results

10%
After I'd received offers from universities

10%
Before I received any offers from universities

20%
Before I submitted my application to university

35%
Before I enquired to any universities

What information did you look for with regards to Clearing?

47%
How Clearing works

37%
When Clearing opens

30%
How long Clearing takes

30%
Courses with lower grade requirements

28%
Alternative courses on offer

21%
Institutions with lower grade requirements

19%
Courses with higher grade requirements

16%
Institutions with higher grade requirements

Not only is it important to understand prospective students' priorities when researching the Clearing process, but it is also useful to gauge what their expectations are of universities on Results Day. To better understand this, we asked prospective students who were considering Clearing how quickly they would expect a decision to be made on an offer after they get in contact with a university's Clearing department. When asked about this, 31% expect a decision within the hour, 14% within one to two hours, 17% expect it to be made on the same day, and34% expect a final decision either the following day or within the same week. This suggests that this audience have a thorough understanding of the speed with which they want universities to act after receiving their results on Results Day, and that they as individuals need to act accordingly if they are able to attain a place at university.
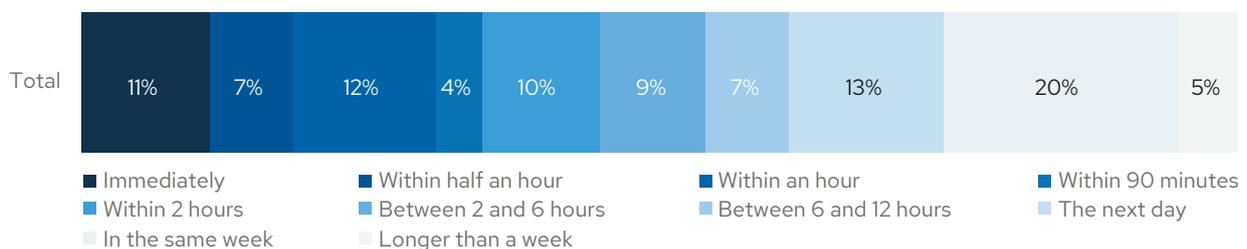
In addition to a quick decision on whether they have been accepted on a course, prospective students also expect a high frequency of communication between themselves and universities in the days and weeks following Results Day; 6% expect to be contacted up to three times a day, 17% expect daily communication and 37% would like to be contacted once every two to three days. This reiterates the suggestion that prospective students expect universities to be able to respond to their queries quickly and for a constant line of dialogue to be maintained throughout the entire Clearing process.

When it comes to the final stages of the Clearing process, students are relatively divided in terms of their confidence in knowing what to do next. Whilst 40% are either 'very' or 'quite' confident about the next stages, a significant minority of 24% claim not to be confident about the final stages. This suggests that for some their understanding of Clearing only extends as far as what they need to do on Results Day. Beyond that, this audience have not given much thought to what else needs to be done in the days and weeks leading up to their actual enrolment at a university.
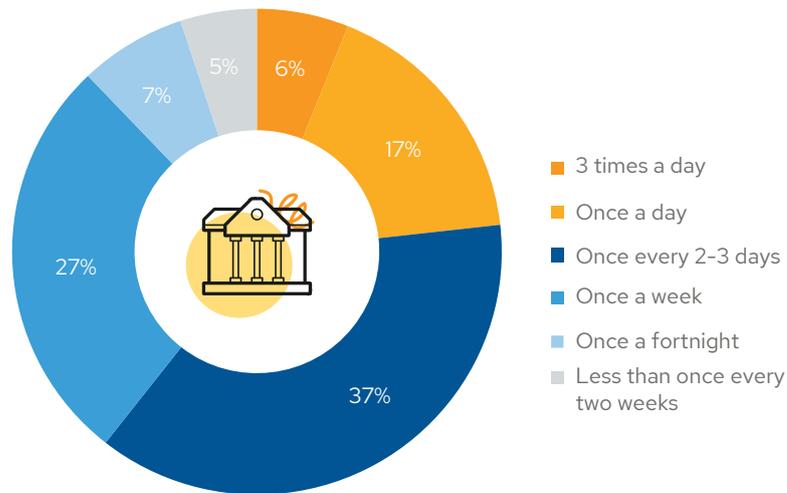
Therefore, it follows that interest in a service which provides prospective students with information about the final stages of the Clearing process is high; 80% would find such a service either 'very' or 'quite' useful. This suggests that there is a significant level of demand amongst this audience for universities to be able to contact those prospective students with an interest in Clearing with all the relevant information they might need and that universities need to be proactive in doing so.

In 2021, the pressures facing universities have increased significantly compared to what has come before. Universities will need to be well organised and efficient in the days and weeks after Results Day if their Clearing procedures are to be a success. The demands placed on them by prospective students will place a huge amount of strain on universities and their ability to keep up with the needs of this audience. Therefore, it is of crucial importance that they are able to devote and invest adequate resources towards their Clearing departments if they are to continue to attract students in this way.
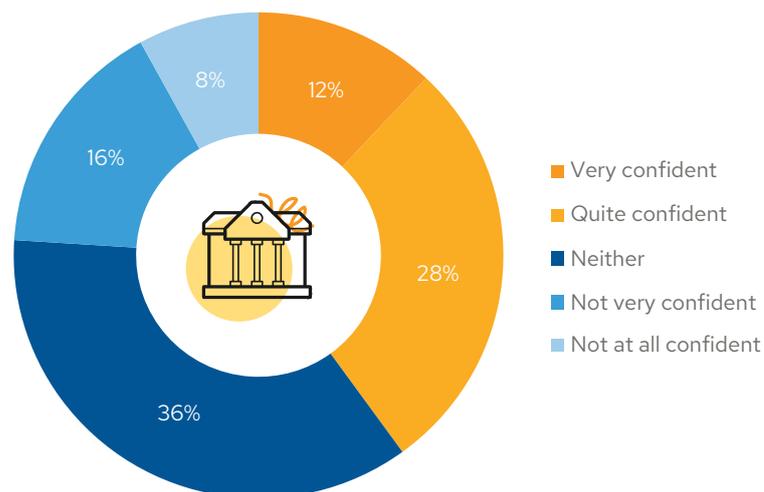
At the start of the Clearing process, how soon after contacting a university you expect a decision to be made on an offer?

| Total | 11% | 7% | 12% | 4% | 10% | 9% | 7% | 13% | 20% | 5% |

■ Immediately ■ Within half an hour ■ Within an hour ■ Within 90 minutes
■ Within 2 hours ■ Between 2 and 6 hours ■ Between 6 and 12 hours ■ The next day
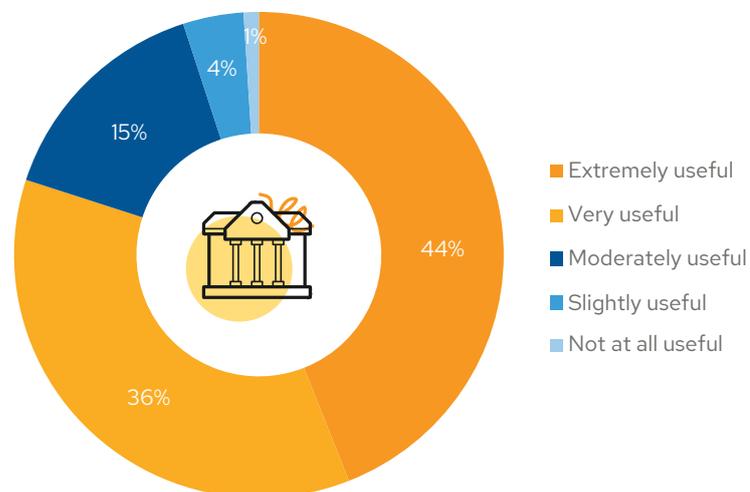■ In the same week ■ Longer than a week

After receiving your offer from a university via Clearing, how often would you expect a university to contact you in the days following this?

- 3 times a day — 6%
- Once a day — 17%
- Once every 2-3 days — 37%
- Once a week — 27%
- Once a fortnight — 7%
- Less than once every two weeks — 5%

After receiving your offers from universities through Clearing, how confident are you in the next stages of the Clearing application process?

- Very confident — 12%
- Quite confident — 28%
- Neither — 36%
- Not very confident — 16%
- Not at all confident — 8%

And if the university was to contact you with information about the final stages of the Clearing process, how useful would that be to you?

- Extremely useful — 44%
- Very useful — 36%
- Moderately useful — 15%
- Slightly useful — 4%
- Not at all useful — 1%

Conclusion

As with many areas, the UK higher education sector has experienced a significant amount of turmoil over the last year. Not only has it been forced to adapt its teaching practices, but it has also had to step up its support for students in the wake of the impact of coronavirus.

Combined with uncertainty over the lasting impact of Brexit and the future scope of the Turing Scheme means that universities will need to carefully consider their recruitment strategies and re-evaluate the relationship with their own students in the coming years.

Some of these issues will require individual universities to adapt, improve and evolve their own capabilities, whilst others will require cross-sector cooperation from multiple stakeholders. When thinking about their future strategies in both the short and long-term, here are the key things they should bear in mind:

1. As vaccination efforts continue and the country progresses with its roadmap out of lockdown restrictions, it is vital that universities plan ahead and prepare their campuses for a full return to face-to-face teaching in September.

2. Following last year's disruption around university admissions and the cancellation of this year's exams, universities must proactively consider what more they can do to make the admissions process easier for prospective students as they receive their results.

3. The measures required to combat the coronavirus at universities have led to a renewed focus on the mental health of students. Universities must enhance their support for the mental wellbeing of their students by engaging in a range of activities.

4. Future career considerations are a significant priority when prospective students come to fill out their university applications. Universities need to reflect this in their support services, as prospective students anticipate that by the time they graduate, the job market will be at full strength.

5. With many students confined to their rooms and only able to attend lectures and seminars virtually, it is important for universities to invest their resources appropriately to maximise the students' return on investment for their tuition fees.

6. As the UK looks to fulfil the ambitions of its recently updated International Education Strategy, it is vital that the government and universities work together closely to boost the awareness and understanding of the Turing Scheme amongst prospective domestic students.

About QS

QS Quacquarelli Symonds is the world's leading provider of services, analytics, and insights to the global higher education sector. Our mission is to enable motivated people anywhere in the world to fulfil their potential through educational achievement, international mobility, and career development.

Our QS World University Rankings portfolio, inaugurated in 2004, has grown to become the world's most popular source of comparative data about university performance. Our flagship website, www. TopUniversities.com – the home of our rankings – was viewed 149 million times in 2019, and over 94,000 media clippings pertaining to, or mentioning, QS were published by media outlets across the world in 2019.

QS portfolio

- **QS Digital and Events** provides prospective undergraduate, graduate, and MBA applicants with independent guidance throughout their search and decision making. Our world-class digital platforms include TopUniversities.com, TopMBA.com, and QSLeap.com which support search and inform applications to programs matching their profile and aspirations. In parallel, prospective students can meet, either virtually or face-to-face, with admissions officers of international universities and business schools. For universities and business schools, it offers effective and innovative digital and off-line student recruitment and branding solutions.

- **QS Enrolment Solutions** supports higher education institutions to maximize their student recruitment with a range of specialist services, from data-driven insights and high-quality lead generation to optimized communications and student conversion. With over 20 years of experience QSES has an unequalled understanding of international student decision-making.   Our international office locations (UK, Romania, India, Malaysia and Australia) enable us to operate across time zones to deliver high value to our partners and exceptional services for applicants.

- **The QS Intelligence Unit** is a leading originator of institutional performance insight drawing on unique proprietary datasets gathered in pursuit of its published research. Best known for the widely referenced QS World University Rankings, today comprising variants by discipline and geography, the unit also operates a sophisticated, multi-dimensional quality standard; a comprehensive analytics platform facilitating advanced benchmarking; and an in-demand consulting team. Our insights both inform and are informed by frequent presence and digital conferences for educators, university leaders, and policy makers.

- **QS Unisolution** is dedicated to developing SaaS technology solutions to increase the efficiency and effectiveness of international mobility, relations, and recruitment functions within education, positively impacting the educational experience for the students, staff, and partners we serve.

For more information about the QS services, please contact b2bmarketing@qs.com

To continue empowering motivated individuals and institutions across the world alike during the coronavirus outbreak, QS's response has included:

- Moving its student recruitment events online, ensuring that universities and talented potential applicants across the world are still able to achieve high-quality personalized engagement.

- Expanding its range of digital marketing offerings, empowering student recruitment teams as they seek to maintain outreach and enrolment efforts.

- Launching a webinar series designed to enable university faculty and administrators alike to share best practices as they transition their educational offerings into the virtual classroom.

- Ongoing surveys of prospective students and institutions globally to analyze how the COVID-19 crisis is impacting them.

In 2019, as part of our commitment to sustainability, QS became a certified CarbonNeutral® Company, reflecting our efforts to reduce our impact on the environment through a range of efficiency initiatives and offsetting unavoidable emissions through a verified carbon offset forestry project in Brazil.