

Minutes

AG/23/M1

HE Marketing Services Advisory Group

Held on Thursday 9 March 2023 virtually through MS Teams

Meeting scheduled to start at 10:30 until 14:00

Chair:	Sam Uzzell	University of Surrey
Attendees:	Adam Sturch Ailie Ferrari Clare Martin Erin Walmsley Dan Charles Demetria Maratheftis Emily Knox Ioan Evans James Ackroyd Mark Jackson Melissa Nurcombe Richard Bengree	Sheffield Hallam University University of Bradford University of Plymouth University of Nottingham University of Gloucestershire Point Blank Leeds Conservatoire Aberystwyth University University of Reading QMUL University of York University of Chester
Apologies:	Lorraine Westwood Sarah Bostock Fiona Morrison	Bangor University University of Bristol University of Aberdeen
UCAS in attendance:	Becky Hopwood Laura Hawkins Sarah Underwood	Head of Customer Growth - Education Customer Engagement Coordinator Customer Success Director
Presenting:	Daniel Pilkington Maria Goud Vickie Phair Ben Jordan David Penney Richard O'Kelly Joanne Richards	Senior Content Strategist Content Strategist Team Manager – Lead Product Manager Head of Policy Director of Marketing Head of Data Report and Research Senior Insights Lead

Action

A3/20/01 Welcome and apologies

Action

The Group was welcomed to the meeting and the apologies were noted. The Group introduced themselves.

A3/20/02 Minutes and action log from previous meeting

The minutes were approved as a correct and accurate reflection of the last meeting. The open actions from the log were discussed and closed accordingly.

A3/20/03 Subject Guides

Dan and Maria presented UCAS' new subject guides.

UCAS are updating their current subject guides to cover more subjects, and to revamp the content to be more engaging and useful, as well as creating more parity between pathway options. This is a key part of young people's discovery journey on UCAS.com to decide what they want to do next, and the pages get a lot of traffic. There is a potential for careers and amalgamated subjects to come out of the guides and a new design wire frame is being processed which will include new content elements listed below.

The new subject guides should be going live in May 2023 with a phased approach thereafter -

Phase 2: Additional video and visual elements (June 2023, pre-clearing)

Phase 3: Interactive elements, hero campaign around passion for subjects (September-December 2023)

UCAS are looking for expert opinion on the subject matter content and application insight/tips and general advice. They will need providers to test the new guides whilst also giving access to students for their insights.

https://ucasresearch.qualtrics.com/jfe/form/SV_6VI2n115ig8i25o a survey was sent out to the group for them to fill out. Collaborating on these guides will be something that would be useful to help students and universities. There are industry and content guides for apprenticeships.

The subject area content needs to be accurate and appealing, so the group are encouraged to give feedback - d.pilkington@ucas.ac.uk and m.gould@ucas.ac.uk, or if they wish to find out more or have questions for them.

A3/20/04 2023 Cycle Update

Richard O'Kelly delivered an update on the 2023 cycle and January deadlines.

October deadline UCAS were down 5%, and now 2.5% in applicants. However, the long-term trajectory growth is still on the incline.

GCSE grades for UK 18 group experienced over-recruitment in some areas of level 3 which is shown to affect the qualifications and grades, without having sat an exam. AS Levels and higher have a lack of consistency provided so comparing applicants from different nations is a challenge. Educational disruption from COVID impacted the disadvantaged students and UCAS will be watching this closely for HE outcomes and awarded grades. The equality reports looked at offer making by characteristics e.g. area background, which showed a response from sectors making more offers to

those from Q1 and Q2 areas. To maintain consistency in equality gaps the offer making will need to remain the same.

Awarded grades will return to pre-2019 levels, however nursing and education courses have had a huge drop in demand so the extent of changes will not be likely to return to normal, at a macro level there are enough applicants to fill places.

Due to cost of living, living at home is something that applicants are prioritising. It is shown however, that commitment to go to HE and University is high and students are finding part time jobs to support themselves financially.

International demand is growing from countries such as Nigeria, Saudi Arabia, India, Pakistan which has led to 3,500 more international and non-EU students on last year. Applicants from China have reduced due to qualifications not being where they need to be to go to where they want to go, and this is a direct correlation with the pandemic.

Computing is an increasingly popular course, but education and health care related subjects have fallen back to pre-pandemic levels. The volumes for nursing applicants are more diverse with international (especially India) and disadvantaged background applicants.

Late Applicants

They comprise of 60% UK 19+ and 40% International, but different factors motivate these groups. 65% of applicants have outstanding decisions in comparison to 60% last year and 58% in 2021.

Clearing 2023

UCAS have experienced a deceleration rather than decline in demand. The competition remains high in subjects such as maths and engineering courses and there will be more trust in awarded grades and offers made, but the uncertainty with educational disruption will result in a greater amount of students missing out on their choices on results day. Decline my place and insurance options are therefore likely to experience an increase. More applicants are investigating 'top up' choices too. Survey work UCAS carry out informs us there is a continued commitment to HE.

The group are encouraged to contact stats@ucas.ac.uk for any enquiries.

A3/20/05 Policy Update

Ben Jordan handed reports out to the group. Marketing departments benefited from accessing participation plans and insights into where UCAS will be deploying its voice in the future. The group agreed having contextual and vocal experience rather than just statistical data is useful.

Reports have shown that applicants are seeking more financial information due to cost of living, they are researching scholarships, bursaries and how they can financially support themselves during their journey. Students are attending fewer open days than before due to budgeting.

Where next report for China will include questions such as

- *What are the motivations from students from China and how that differs from regions.*

- *What is their starting point - have they taken level 3 qualifications in an international school or are they coming directly from China.*

The next step report will look at the experience of cohort students in HE today, what they are looking forward to and how the content influences their choices.

Research includes Care experience 365 accommodation, bursaries and how UCAS can support on that front to encourage widening access.

There will be 7 new WP questions – carer, estranged students, refugee, asylum seeker, free school meals, young parents, and veterans.

The first report will focus on carers and a survey will be carried out and released by the end of 2023. Feedback from the group on how UCAS can define its voice and ensure the reports are beneficial. UCAS will be updating reports regarding carers, mature students report considering LLE.

By the end of the decade 18-year-old cohort up to 900,000, an increase in demand globally, in 2000 there were 1.6 million internationally mobile students, 2020 5.6 million and 9 million in 2030.

The journey to a million report will go out this month. The first chapter will be on the four nations report, WP narrative and data drop. Chapters to come will include supply and demand, student choice, competition, and wider means of the economy. After this UCAS will focus on an apprenticeship report focusing on parity of experience, access and opportunity and aspiration.

The report will be sent to the group and are asked to promote within their faculty and via social media.

UCAS' broader post 16 review looks at what type of qualifications are funded. It is predicted less students will come to study BTECH extended diplomas as T-levels change. Skills those applicants have may differ institution to institution.

The group are looking into the future of distance learning. Information regarding T levels needs to be more widely communicated to Universities and HE providers.

A3/20/06 IAG Update

UCAS' goal is to transform from being the apply service to the discovery service. They have completed some research with teachers, advisers and schools to reaffirm they are welcome in this market.

Research showed if applicants were interested in a course with a provider attached, they were curious to find out more. When students register for UCAS events it will be done via the Hub, and the provider profile will be waiting for them in the dashboard afterwards. UCAS are then using the traffic to help the providers and using provider profiles to give the data to universities and colleges.

The group expressed an appetite for pop up boxes and data on how student's first impression vs chosen university is influenced.

Entry Grades Report

A commitment in universities UK code of admissions this data is published, and the government are keen to use this. The new product launch should be in September.

Action

When launched into the HEP environment the group are asked to give feedback and will be contacted during that time.

The group discussed student reviews - there were concerns raised regarding validating one person's perspective on their personal experience, which would cause ucas.com to become less trusted and impartial. Would this prevent students from applying and if there were steps to institutions approving the reviews, then they would be responsible for these. If the provider is small, it would potentially benefit less, and would the reviews be filtered by subject or averaged as a whole.

The group agreed there would need to be the dynamic of being able to respond to reviews.

HEMSAG109
DP

A3/20/07 Insights Update

Joanne Richards delivered a presentation on marketing and insight cycle planning.

Aims

To bring the student sentiment and behavior reporting earlier in the cycle. UCAS have been looking at the 'moments that matter' such as ECD. RBD, DBD, C+C, and managing multiple cycles at the same time. This will bring an earlier view of 2024-2025 cycles and what choices students are making – what is influencing them or motivating them in their choices and trends.

Choices, Connections, Competition, Conversion, Sentiment, Influences

The group raised the following points as potential influencing factors

- Are students looking to get the degree done as quickly as possible so looking at shorter degrees without placements.
- Post application students are still thinking of switching out degrees for employment and going into industry.
- Business courses including years abroad are popular due to the experience it brings for links with industry, graduate outcomes, and career prospects.
- Courses with year in industry don't always guarantee placement.
- The influence of industrial action and increases in maths and science subjects for example, have potentially happened due to external influence, media impacting student's choices.
- Subject passion is a factor but the specific appeal of modules and course offers.

Syndicated Research topics

Unpacking importance of subject passion
Segmentation / Personas and motivations
'Brand Russell groups'
Parental influence post pandemic
International student funnel experience
Brand tracking.

j.richards@ucas.ac.uk Joanne welcomed the group to reach out.

A3/20/08 Product Update

Vickie Phair shared new product development and ideas with the group and delivered a presentation to accompany. UCAS are looking to explore international school insights and asked the group whether there is an appetite for targeting international recruitment?

App Track

Some key changes planned alongside a rebrand include changing from JACS to HECOS, definitions to match UCAS' public facing data reports, daily updates helping with year-on-year comparisons and making it easier to view the insight data.

A subscriber survey will be circulated soon so UCAS can find out how the group wants to consume data.

The group were asked whether they would be ok with disaggregating competitors' HEMSAG108 data due to current provider level data being past and closed cycle. Opinions were evenly spread through voicing concerns and seeing the potential in the idea. This topic will be further discussed at the next meeting.

A3/20/09

Any other business and Close

Date of the next meeting and a placeholder will be set in due course.