

Minutes

UMAG/23/M1

UCAS Media Advisory Group meeting

Held on Tuesday 9 May 2023 virtually through MS Teams

Chair: Helena Sturridge Independent Consultant, UCAS Media Board

Attendees: Lucy Finnie University of East Anglia
Obinna Okereke Student Representative
Ben Roth Volvo UK
Joanna Wilson The Pingle Academy
Will Sheppard Cohesion – Recruitment Outsourcing

Apologies: Stephanie Reynolds University of Gloucestershire
Joanne Richards Senior Insights Lead

UCAS in attendance: Rebecca Hopwood Head of Customer Growth - Education
Laura Hawkins Customer Engagement Coordinator
Rory Grant Head of Data Science

Presenting: Carys Willgoss Principal Policy Adviser
Alex Chalk Principal Data Consultant
Michael Lockhart Data Scientist

Observing: Dmitry Dereshev Lead Data Consultant

A3/20/01**Welcome and apologies**

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

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:

- *UMAG005* - UCAS is in the process of finalising new group members from accommodation and data industries.

- *UMAG010* – The National Satisfaction Survey (NSS) data has shortcomings. Kate Morton had made the point that the OfS survey is a snapshot in time at the end of their studies. It doesn't include students that drop out, or factors beyond the course itself. Action has been closed.

Because the NSS is an industry standard and feeds into league tables and is being updated this year it was agreed to see how this year goes before we feedback. TEF review should be over by September.

- *UMAG014* - The group was told that product descriptions have been updated on the website and it was agreed a short summary of a product would be shared before any future in-depth discussions. Action has been closed.

A3/20/03**Forecasting for The Journey to a Million**

Carys Willgoss delivered a presentation on UCAS's Journey to a Million.

The 30% increase forecast from the numbers UCAS see today in 2023 has been predicted through data collection, use of demographic information and exponential smoothing. The growth is driven largely by 18-year-old and international student applicants. China, India and Nigeria currently drive the demand.

[Journey to a Million projections](#)

The forecast shows a slight decrease in domiciled applicants from Wales (-3.9%) and Scotland (-4.4%), a larger increase from England (+26.8%) and slight increase from Northern Ireland (+1.1%). The growth will significantly be present in 18-year-olds and international students. With this UCAS forecast a decrease in EU students whilst a growth in international and non-EU students. There are also regional variances present.

It was noted by a member of the Group that an increase in Nigerian Post-graduate students has been due to worsening economic conditions, governance and if the election of the president changes positively this could increase the numbers.

What could disrupt the growth?

- Changes to the pipeline of international students e.g. more Chinese students remaining in China for Higher Education (HE).
- Shift in Policy e.g. a number cap or student funding changes.
- Demand for HE hits a natural ceiling.
- Economic boom period, or buoyant job market leading to a reduced demand for HE from mature students
- Prolonged recession with a worsening job market.

UCAS is looking at the forecast growth for widening participation, supply and demand, competition, choices and pathways and student experience.

The group were shown media coverage regarding the Journey to a Million campaign.

The report builds on publicly available data from the Office for National Statistics. And brings in UCAS expertise in international trends and potential disrupters.

Asked if any other organisations or government bodies had carried out similar analyses Carys explained the Department of Education had used UCAS's forecast data which suggests they haven't done their own analysis. The results are published in report for on a website and are freely available, revealing a different level of information for different audiences

The question was raised as to whether it was a commercial opportunity for working with the government.

A concern was raised about the perception that international students displace domicile students in the

competition for university places. What is UCAS doing alongside Journey to a Million to counter these perceptions?

As competition for places rises this will be a regular narrative, however, reports suggest the growth in international recruitment benefits domestic students. The group discussed the value in ensuring accommodation and appropriate services are in place to meet the changing demographics.

Alex Chalk presented an overview of the Data Governance Framework – that is applied to Forecasts for commercial use.

The group discussed the commercial use of data around WP, acknowledging the importance for UCAS's future. The following points were raised

- How does UCAS balance the value of monetizing the data and the value of adding to national discussion.
- There are political dilemmas for UCAS –
- If UCAS exists to get more people into education, how does it demonstrate that it helps the UK and international economies. return.
- The Group discussed the importance of keeping UCAS's charitable aims but also making enough money to pay for developing its work.
- It was agreed the findings have huge potential for PR and Marketing and that it should be a part of the national discussion.

UCAS has agreed to come back to the group with propositions for specific product ideas.

RG
UMAG015

A3/20/04

Freshers Report Insight

Michael Lockhart presented the 2023 Student Lifestyle Report, and some of the findings from the surveys

Three different surveys were conducted around retail technology, students' experience and how students live their day-to-day life. UCAS has used the survey data to and extrapolated it to represent the entire student population year on year.

It is expected to be of value to finance, banking, insurance industries, health and public sector information and

communications, professional services, real estate, student living and tech sectors. This study is particularly relevant to student life and media marketing agencies. The questions and responses have been updated over time from 2018-2023. The published reports have received over 1,000 downloads from over 600 companies.

Findings around spending, supermarkets, social media and brands.

Findings have shown student's spending has dropped with the cost-of-living crisis. Spend on clothing and eating out has decreased whilst books and study materials have stayed stable. Budget supermarkets such as ALDI and LIDL have increased market share and within social media usage we have seen the fall of Facebook and the rise of Instagram.

Students have been less concerned about ethical considerations when purchasing items, and brands like Shein are favoured whilst recyclability and animal testing are taken less into consideration.

It was explained that UCAS is using the reports to pen doors with industry customers. UCAS does currently sell market some data on student behaviour to the banking sector. UCAS is exploring how this data can help industry sectors with their messages e.g. should a tech product lead with ethical or cost saving approach to capture the attention of the student audience.

Once the reporting has been completed UCAS will be holding an event to present the findings. The group were asked for their ideas for other ways UCAS might commercialise this information across industries.

How could UCAS leverage the study better through reports?

The group emphasized the importance transparency with students on the usage of data when sharing this data across the industry

The value to UCAS of being recognized as the source of information.

Importance of price alongside price points.

A member of the group suggested employers would also find comparison with students at the end of their studies valuable.

The report releases can be read here –

<https://www.ucas.com/connect/blogs/student-lifestyle-report-2023-cost-living>

A3/20/05

Any other business and Close

The group agreed to share any ideas for commercial products coming out of both the Journey to a Million data, and the

RG
UMAG016

Action

Freshers – Lifestyle Survey. Becky Hopwood will circulate some targeted questions and members of the group are invited to share their thoughts with all.

Date of the next meeting has been proposed as 10am Tuesday 7 November.