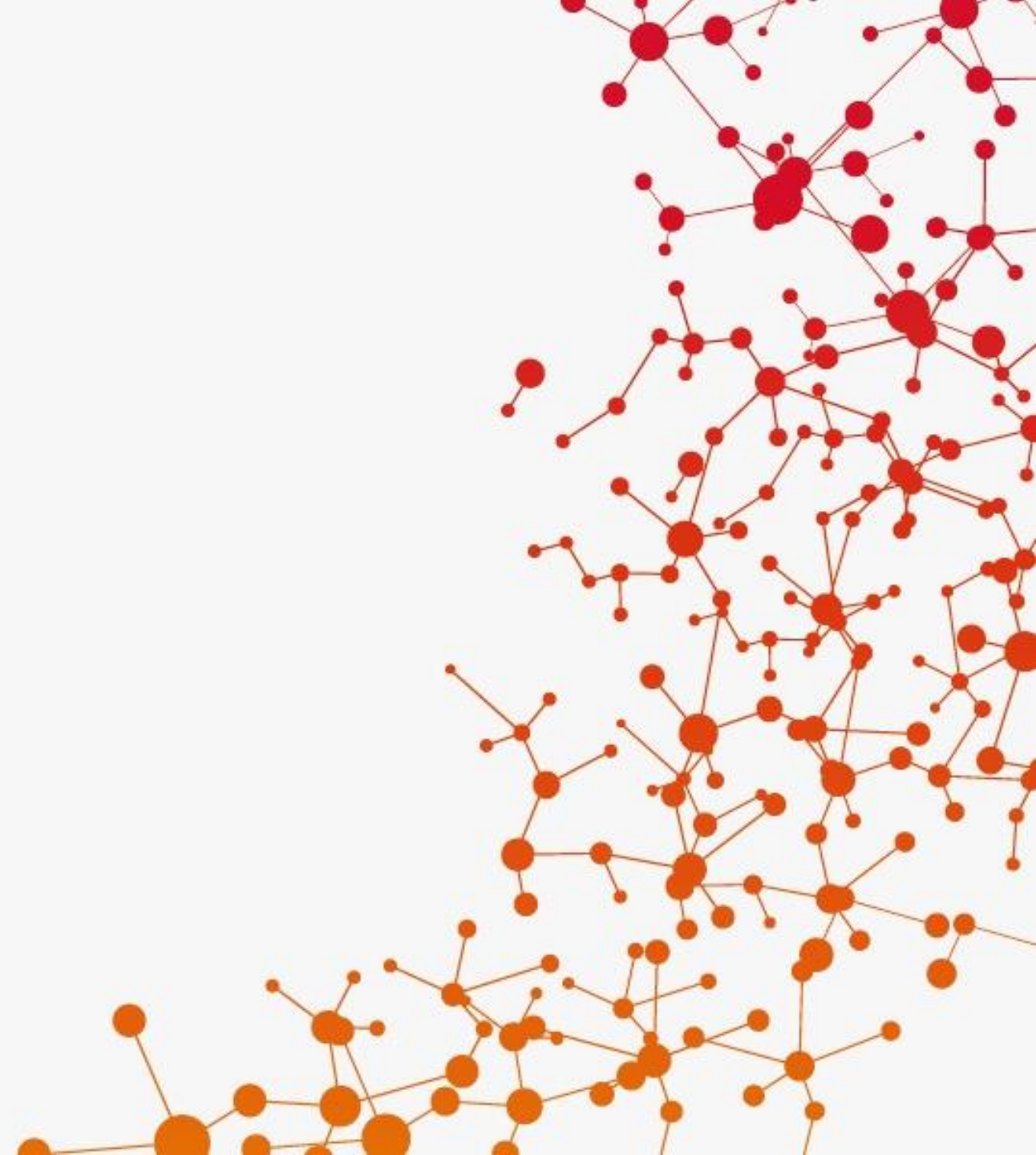


# WHAT ARE THE KEY FACTORS INFLUENCING STUDENTS' DECISION MAKING?

---

Jon Montgomerie, Associate Head of Client Success, UK  
Ingrida Daujoti, Account Director

HELOA National Conference  
Thursday 11 January





# WELCOME

---

Jon Montgomerie

Associate Head of Client Success

Ingrida Daujoti

Account Director



# Understanding Students



## 1. REAL-TIME DATA

Powered by student behaviour on our sites, real time data and cutting-edge analytics deepen our understanding of student demand trends.



## 2. PEER-TO-PEER

The 200,000 student reviews on Whatuni bring the student voice to applicants to support decision making.

Peer-to-peer interactions through TAP deepen the relationship between institution and applicant.



## 3. USER RESEARCH

A core step in our product development is user research, working directly with students to understand their pain points

Our dual-website audience provides a broad pool of students and key influencers to access at key moments in the cycle.





# Domestic Student-facing Brands



Undergraduate  
Course Search  
Peer-to-peer reviews  
4.8 million users



Primarily Undergraduate  
League Tables  
7.6 million users



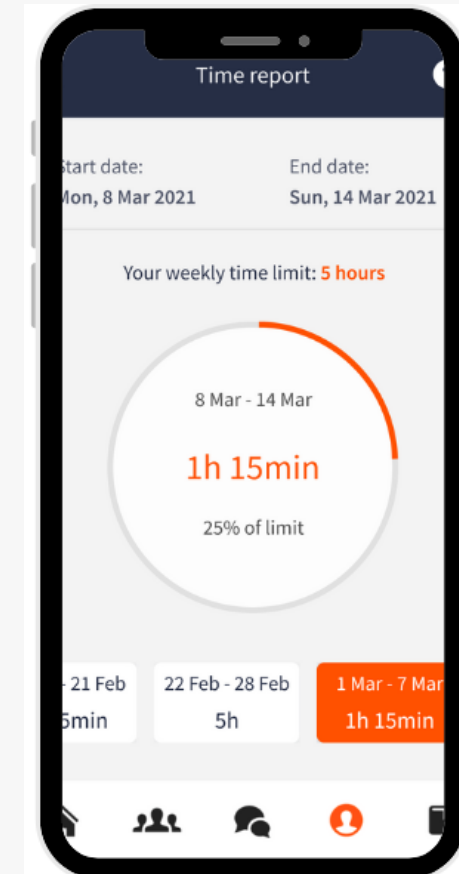
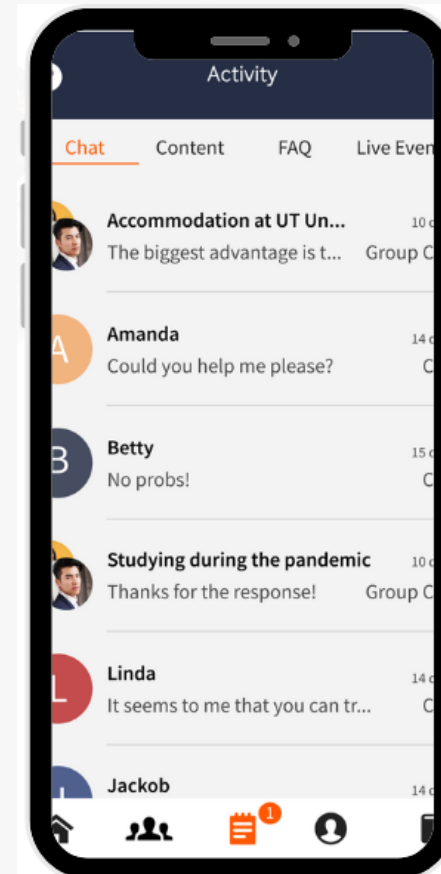
Postgraduate  
Course Search  
2.6 million users

# Domestic Student-facing Brands



## The Ambassador Platform

TAP Feed  
Peer-to-peer chats  
UGC  
Online Events  
Gamified app



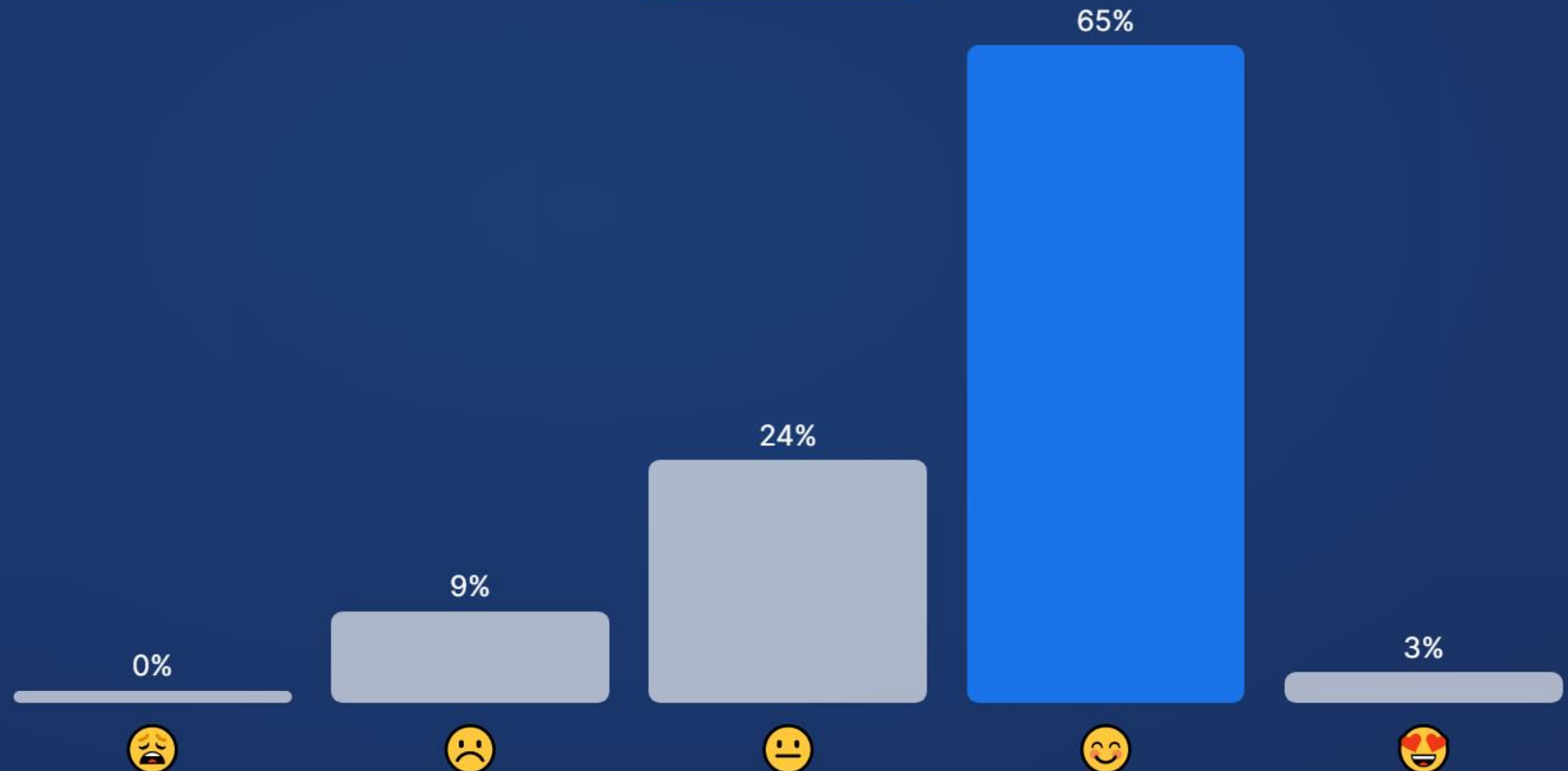


Join at  
**slido.com**  
**#1444 295**

**How well does your institution utilise data and insight on prospective student demand to guide marketing and recruitment activities?**

😞 - Help. 😄 - Experts!

Score: 😊 3.6



# Why data and insights?

How can data/insights support our decision making?

## THE CHALLENGE

Competitive Landscape

Funding Crisis

Cost of Living





# Real time in cycle student demand

Real-time data from course and institution search across the UK



16m+ annual site visits  
across 3 UK sites



Tracking UG & PG  
prospective student  
research behaviour



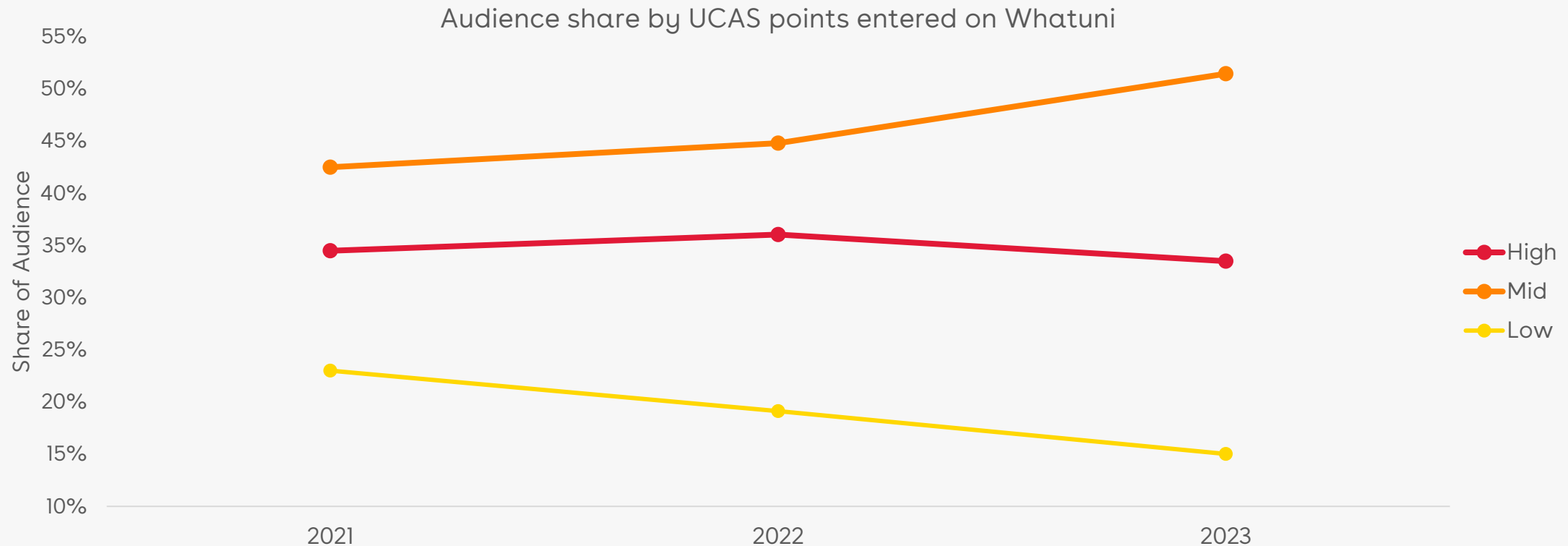
Real-time data,  
able to see trends up  
to the day before





# What UCAS Points are telling us?

UCAS points entered on Whatuni between September – November



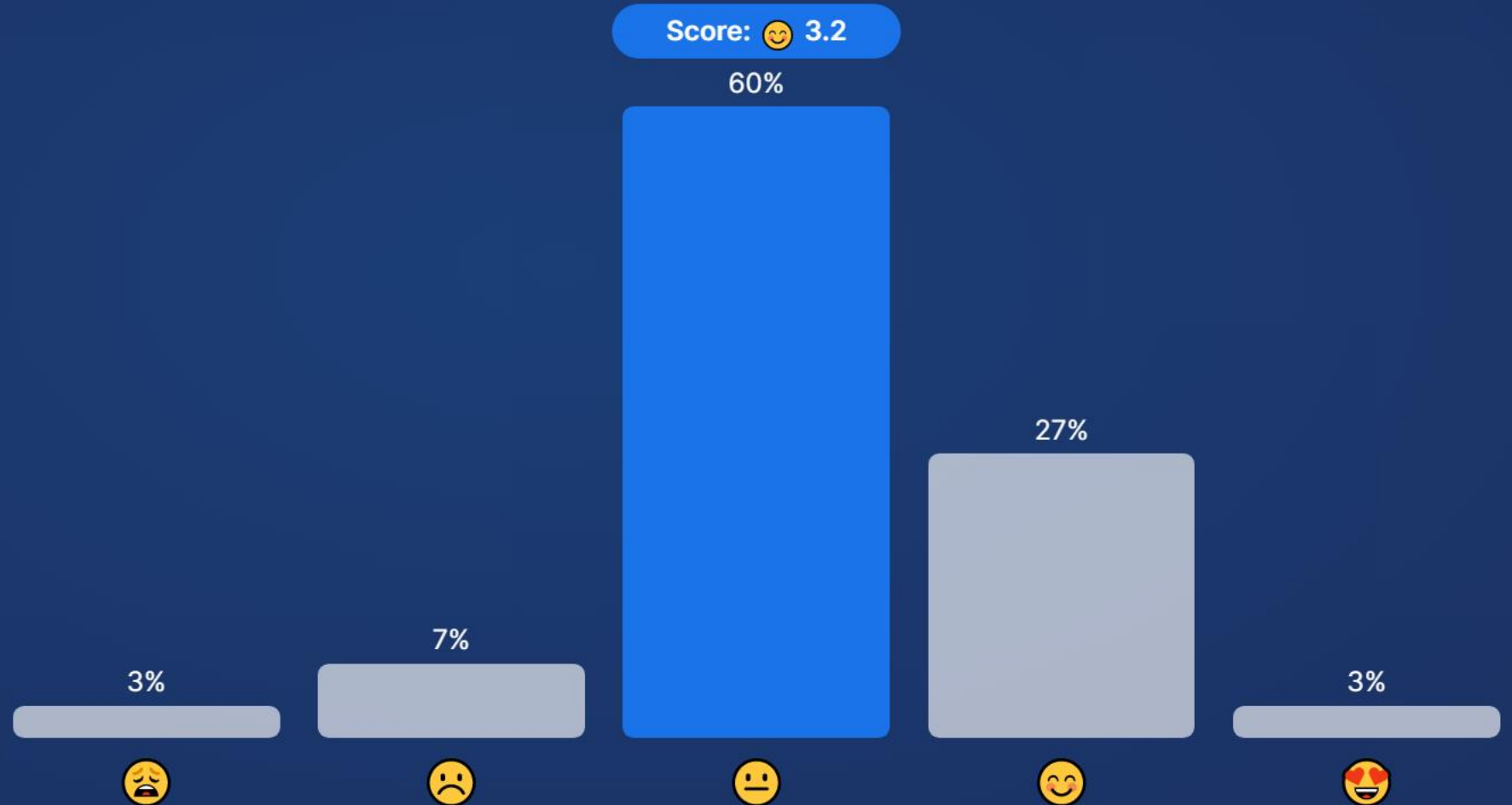
- The data looks at % share of UCAS tariff points entered by prospective students in the qualifications filter between September – November.
- The graph demonstrates that share of students entering medium grades increased significantly at the expense of high and low tariff grades which suggests that student expectations are still high. With grades having returned to pre-pandemic level we could continue seeing more prospective students failing to achieve their expected exam grades translating into bigger clearing campaigns.



Join at  
**slido.com**  
**#1444 295**

## How well do you think your institution's course portfolio has shifted with market demand in recent years?

😞 - Unchanged. 🤩 - With huge success!



# Subject Demand – Opportunities

Subject % change YoY in share of the market

Which subjects saw the highest increase in share of the market?



+0.7% Applied and Pure Sciences



+0.6% Law



+0.5% Engineering and Technology



# Subject Demand – Risks

Subject % change YoY in share of the market

Which subjects saw the highest decline in share of the market?



-0.3% Education



-0.5% Social Studies and Media

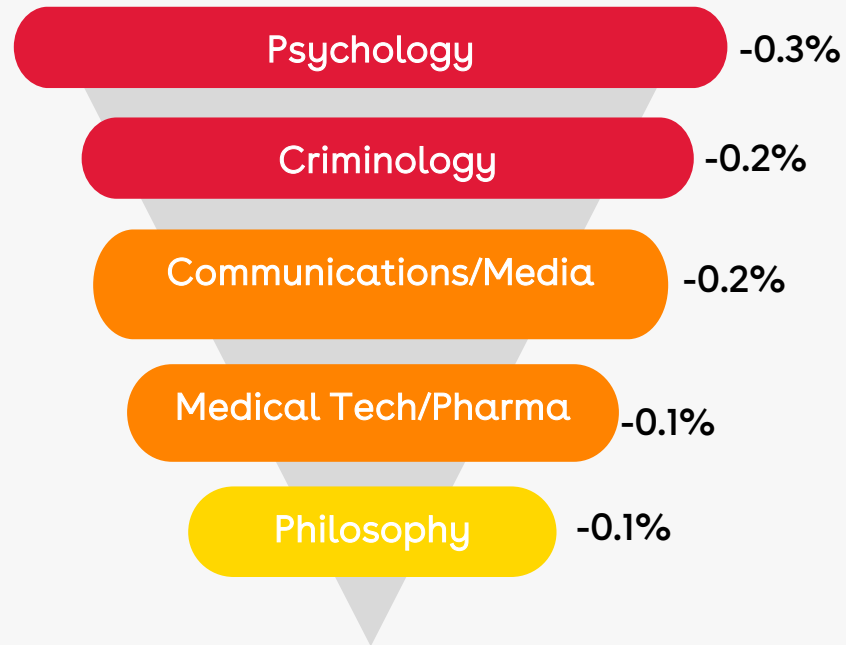


-0.6% Health and Medicine

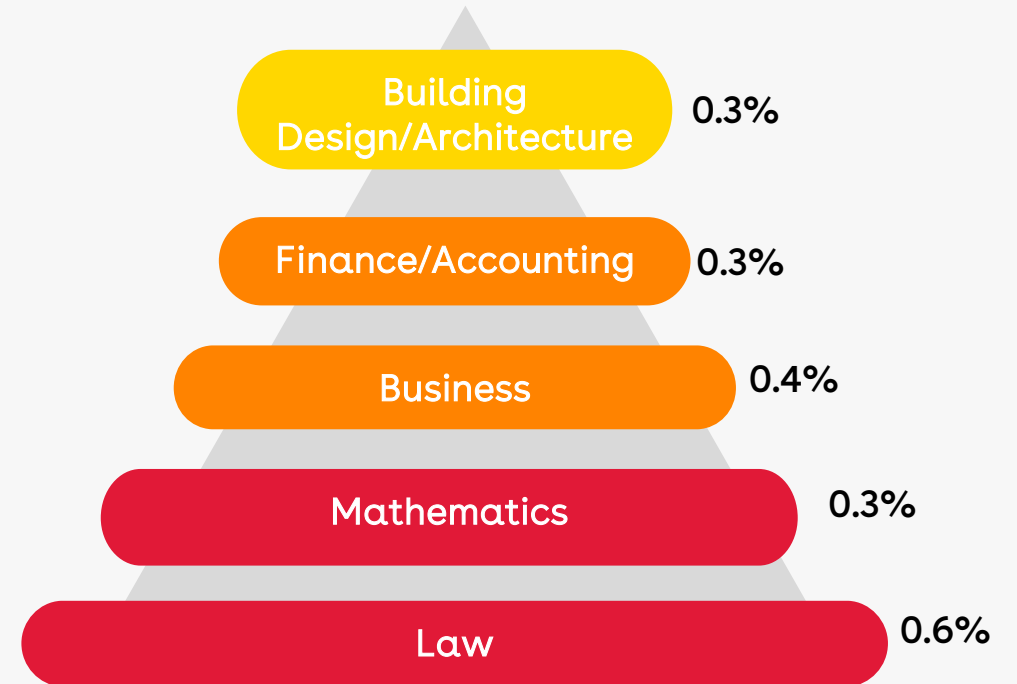
# Sub-discipline demand change

Sub-discipline % change YoY in share of the market

## Decline

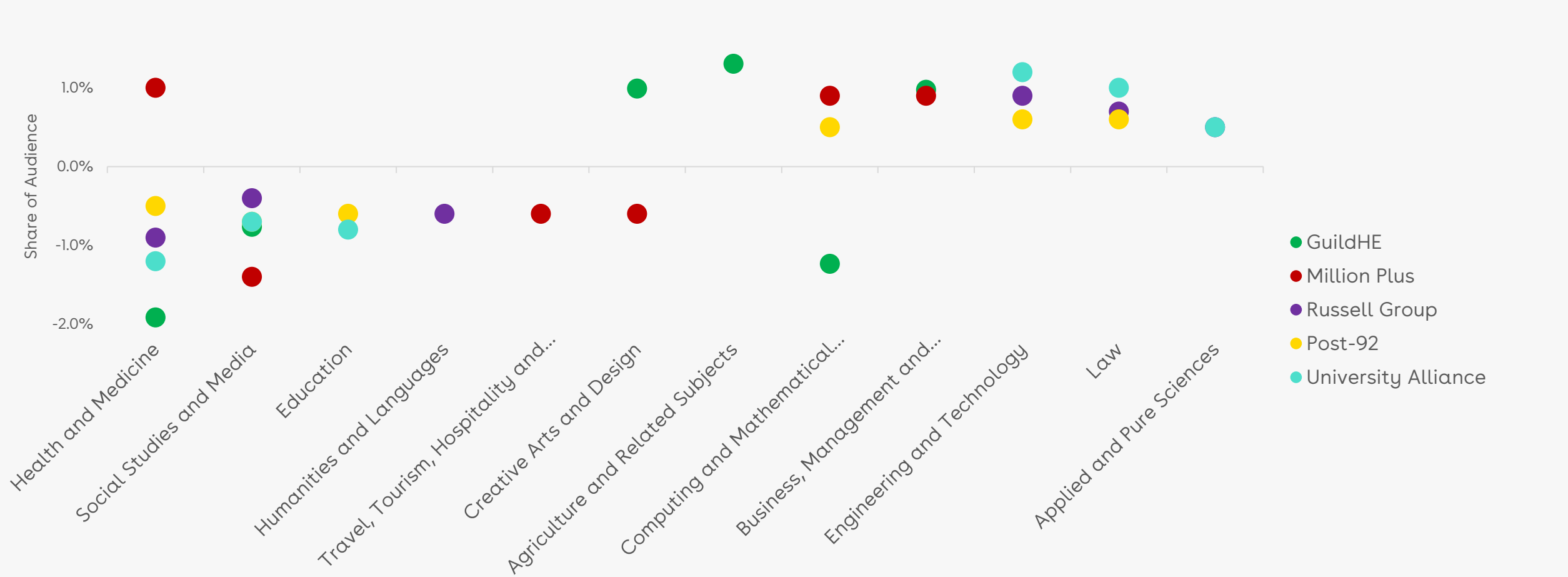


## Increase



# Subject Demand – Mission Groups

Highlights of Subject Demand changes by Mission Group September - November



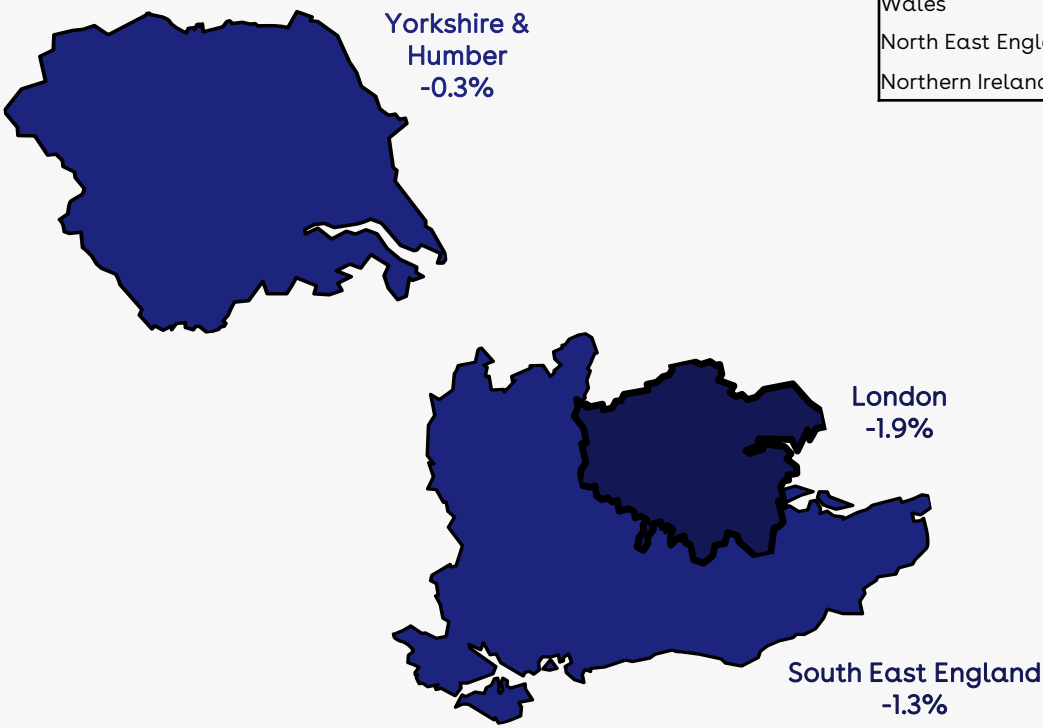


# ORIGIN DEMAND YoY

Where researchers are domiciled, by region 1<sup>st</sup> Sept – 30<sup>th</sup> Oct YOY

Share of Audience	2023
Greater London	25.0%
South East England	15.7%
North West England	9.9%
Eastern England	9.3%
West Midlands	8.7%
South West England	7.1%
Yorkshire and the Humber	7.1%
East Midlands	6.3%
Scotland	6.1%
Wales	3.6%
North East England	2.7%
Northern Ireland	2.1%

Which regions increased/declined in the share of prospective students?

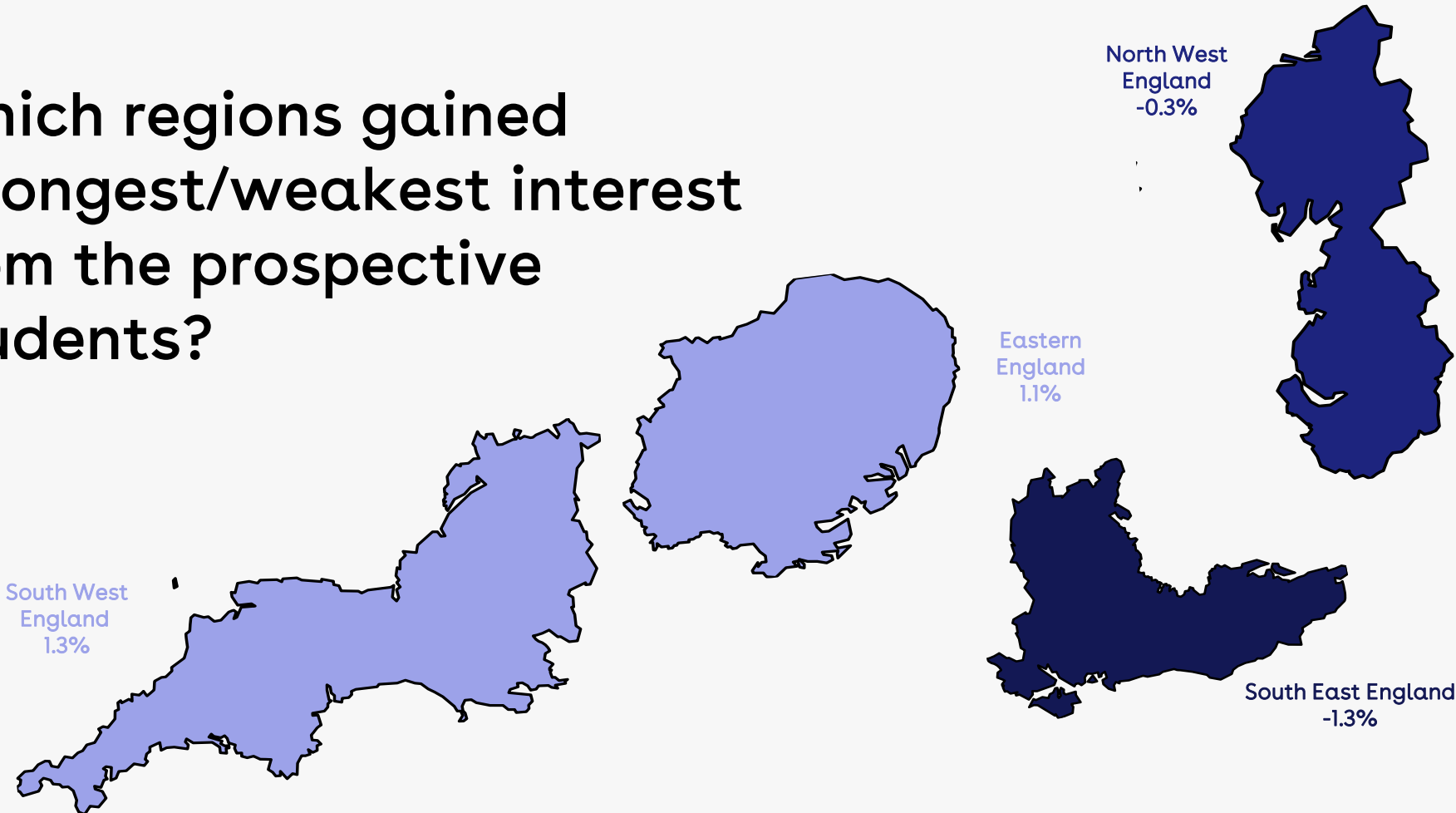


# DESTINATION DEMAND YoY

University destinations researched by users 1<sup>st</sup> Sept – 30<sup>th</sup> Oct YOY

Which regions gained strongest/weakest interest from the prospective students?

Share of Demand 2023	
Greater London	28.0%
South East England	22.9%
South West England	20.9%
Southern Scotland	18.9%
East Midlands	17.2%
North West England	16.4%
West Midlands	16.1%
Yorkshire and the Humber	15.4%
Eastern England	12.3%
North East England	9.3%
Wales	8.4%
Northern Ireland	2.5%

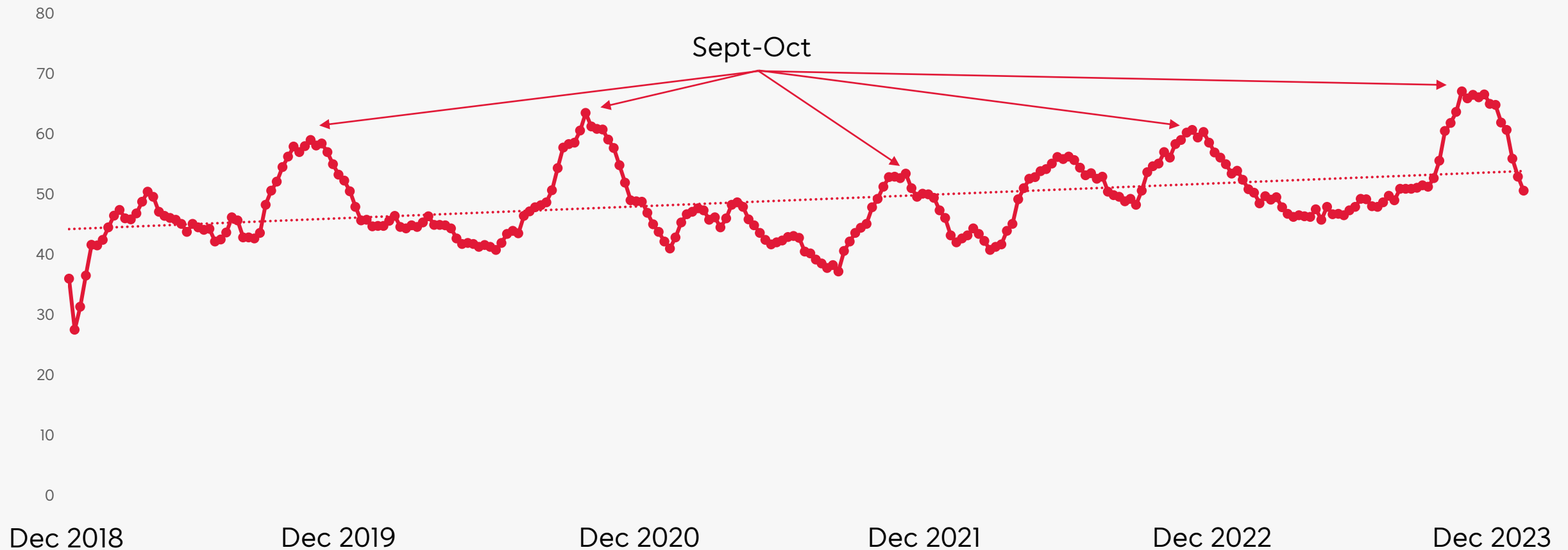


Source: IQ Demand Tracker +

# Peer-to-peer

## Importance of student reviews

12-week rolling average for frequency of Google searches for 'Student Reviews' in the UK - last 5 years





# Peer-to-peer

Importance of student interactions to recruitment



85% of students want to hear from peers

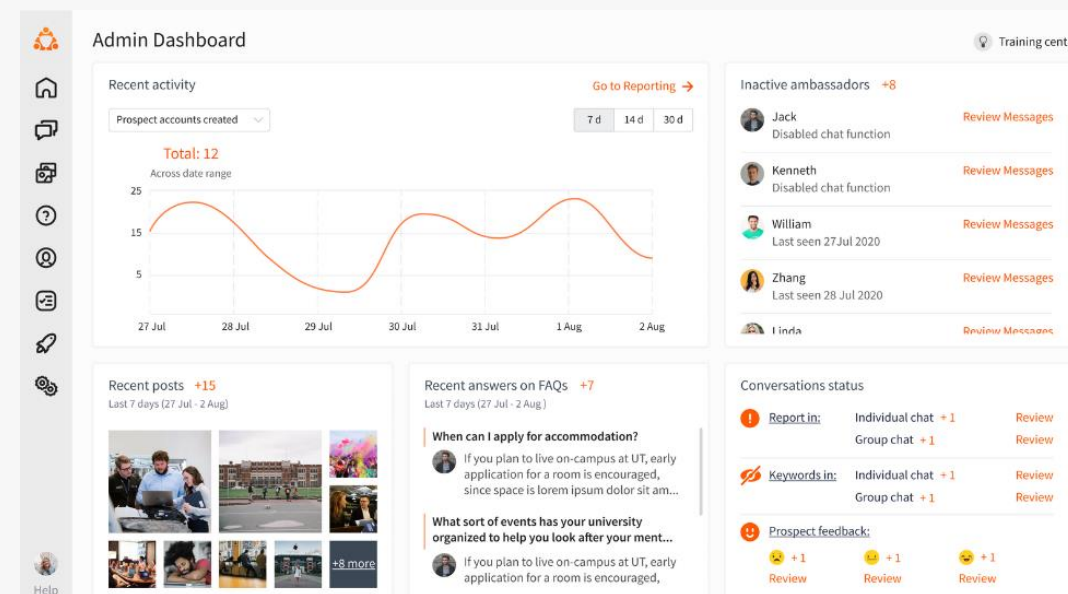
Source: Edified Enquiry Experience Tracker

58% trust fellow students the most

Source: TAP Student Survey

88% connect with students

Source: TAP Student Survey



In Law

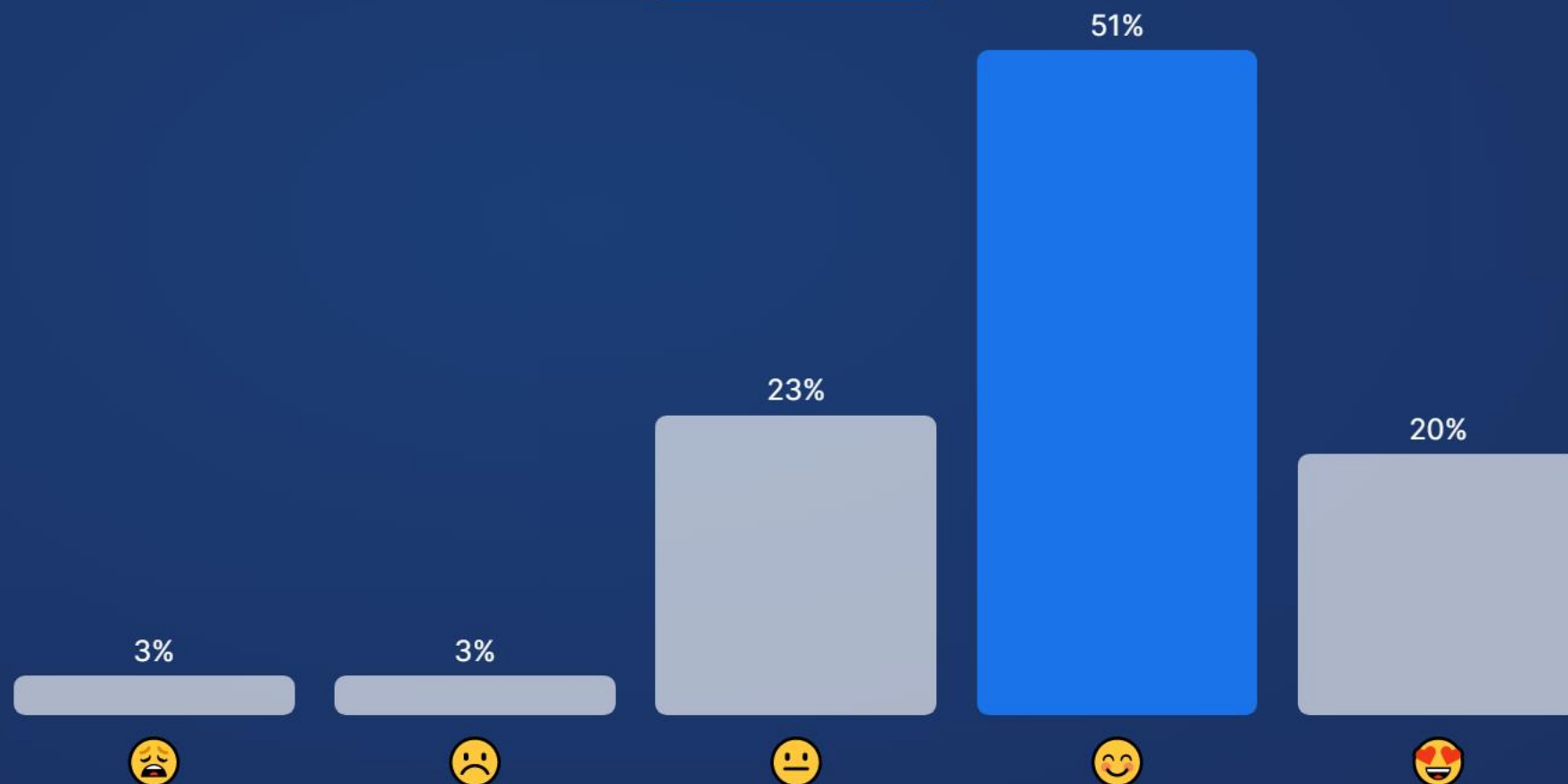


Join at  
**slido.com**  
**#1444 295**

## To what extent does your institution use peer-to-peer as part of the student recruitment strategy?


😞 - Completely unutilised 🤗 - Core to strategy

Score: 😊 3.8

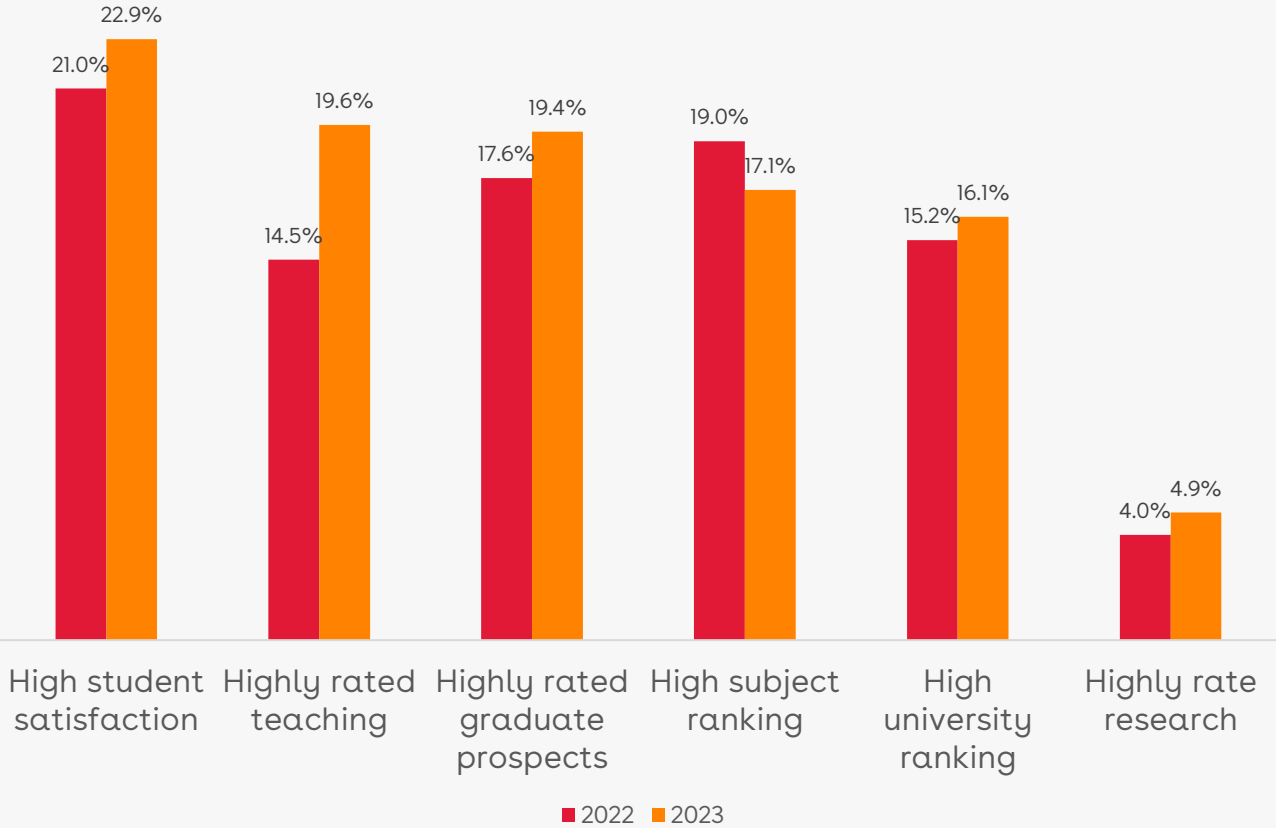


☆☆☆ Student Satisfaction #1 factor

 Teaching quality surge

 Subject ranking slipped from #2 to #4

Top priorities when selecting universities



# Autumn 2023 Survey

Have you decided which universities you will apply to?

1 in 3 applicants for  
2024 undecided

Nearly 2 in 5  
applicants for 2025  
already know!

2024



2025



Yes  
No



# Autumn 2023 Survey

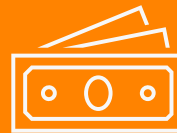
## Cost concerns and important factors

Select the five most concerning costs of going to university for you

Cost of  
Accommodation  
is the #1 concern  
for future students  
and their parents



Day-to-day costs  
are greater concern  
than tuition fees



Rank your top 5 most important factors when  
making university choices

Course Content  
was #1 selected  
factor, more than  
twice as often  
as anything else

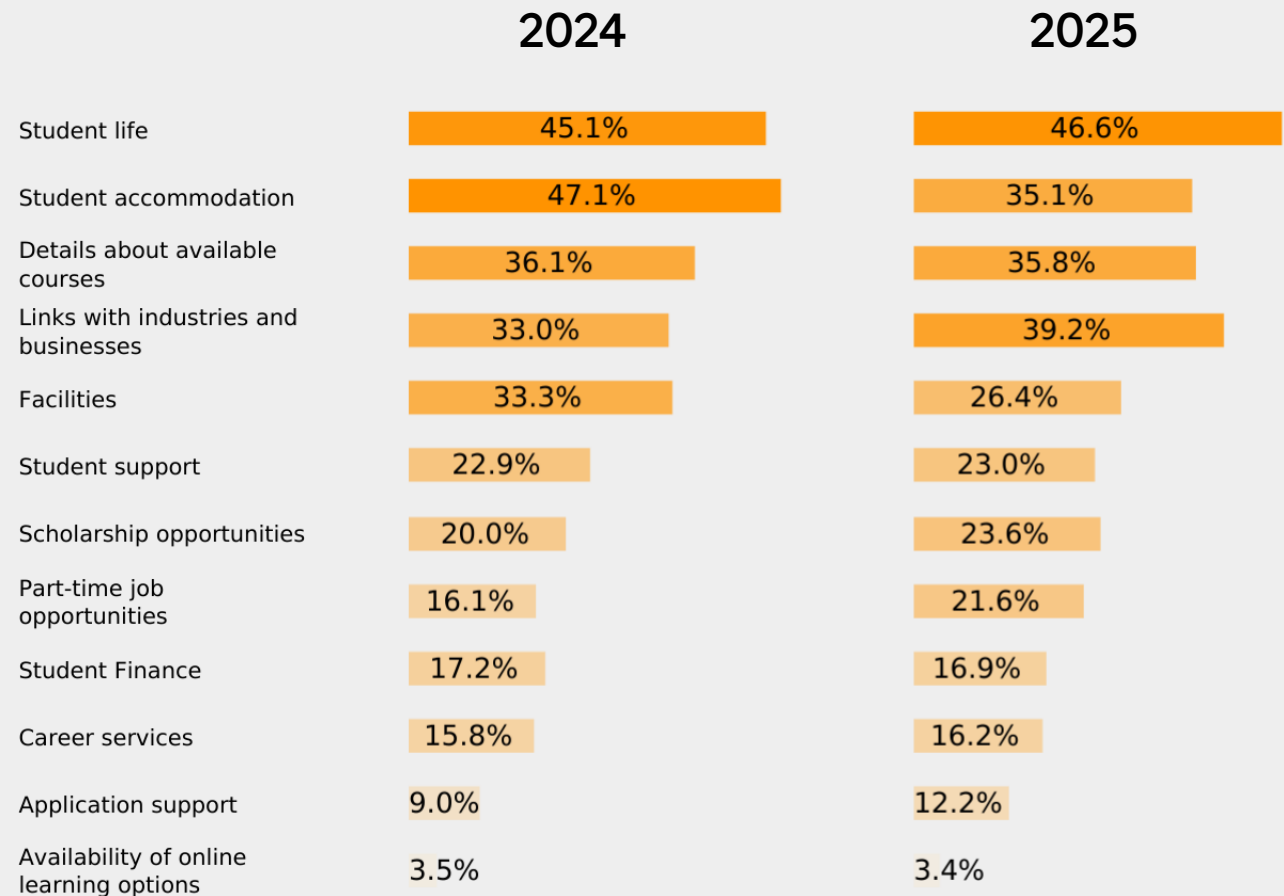


# Autumn 2023 Survey

What are the things you're most interested in hearing about from universities?

Accommodation and student life are pivotal for 2024

Links with industry more important than accommodation for 2025 applicants



# Key Takeaways



## HARNESS THE STUDENT VOICE

- Growing in demand
- More trusted
- Appetite for conversation and review content



## FINANCIAL WORRIES

- Utilities, accommodation, tuition fees
- How are universities supporting and reassuring applicants



## USE DATA TO DRIVE SUCCESS

- Identify real-time trends to support short-term marketing goals
- Use market insight to achieve long-term goals i.e. course portfolio review



# THANK YOU FOR YOUR ATTENTION

---

Any questions?

