

UPP Annual Student Experience Study 2016



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Objectives and Methodology



Context and Objectives

University Partnership Programme (otherwise known as UPP) provides student accommodation and facilities management to higher education institutions in the UK. As UPP's success rests on its clients' success in attracting and retaining students, UPP is interested in helping its clients provide the best possible student experience.

The UPP Student Experience survey has drawn comparisons between expectations and the reality of university life, examined satisfaction with the most important aspects of the student experience (both academic and non-academic) and suggested how institutions can better meet students' needs since 2012.

Overall Research Aim:

The main research aim is to give UPP up-to-date insight and trending data into student and applicant accommodation satisfaction, expectations and preferences.

In detail, the objective is to:

- detect trends in accommodation preferences,
- understand whether differences in accommodation preferences between applicants and students persist, and
- measure changes (if any) in satisfaction with purpose-built accommodation,
- report on why some people who wish to live in purpose-built student accommodation do not do so, and whether the reasons for this have changed.
- understand the perceptions of apprenticeships and how applicants choose between apprenticeships and university
- understand the perceptions of employment programs on the part of universities employers as part of a broader strategic need to communicate the employability benefit of degrees

YouthSight

Since 2012, YouthSight has conducted the fieldwork for UPP's annual Student Experience surveys. We also delivered a full report in 2012 and 2013.

We help clients see the world through the eyes of young people, students and young professionals. Our specialist practice teams provide the insights and data that universities, brands and policy-makers need. We own and manage The OpinionPanel Community - the UK's largest youth research community, comprised of 135,000 16-30 year olds.



We run State of the Youth Nation, the most up-to date youth tracker in the UK. SYN keeps youth brands, broadcasters and policy makers in touch with Millennials and Generation Z.



In 2014 we won one of our industry's most prestigious awards, for our 'mobile first' approach to surveys. Given the demographic we research, it is important that we enable young people to complete surveys on whichever device that are most comfortable with. This led us to innovate in the technology space and produce a mobile survey platform that brings new levels of functionality to a responsive research platform.

Methodology

This survey was hosted online using YouthSight’s bespoke survey platform, as it was in previous years. It took roughly 10 minutes to complete and all participants completed the survey between 8th June 2016 and 13th June 2016. All participants were invited to the survey via email link and sampled as detailed below.

Data was processed and cleaned by YouthSight. During data quality checks, 13 participants were removed from the final sample who answered the questionnaire too quickly or did not answer questions properly (i.e. selected responses via a pattern). Following this, the data was weighted according to HESA data to ensure that the student and applicant cells were both representative of their populations (see ‘Survey Sample’ for more details).

In this sample design is a clear intent to maintain consistency with previous years of data in order to allow for year to year comparisons and analysis of trends. As in previous years, all applicants and students were incentivised for taking part to the value of £1 (either High Street or Amazon vouchers).

Survey sample

The survey was fielded with an online panel sample of 1108 participants including 550 first-year, full time, undergraduate students at UK universities and 558 university applicants. As the survey was fielded in June 2016, all students were just ending their first year of study at the time the survey was conducted.

Though the roughly 50-50 split between students and applicants was imposed by design, each of these two cells was recruited to representative quotas by gender and age according to HESA data for first year, full time undergraduates at UK universities. Following completion of fieldwork, all data was weighted according to the same HESA statistics. Therefore, each of these cells is broadly representative of the wider population that they represent.

The weighting matrix is included in an appendix.

As in previous years, all qualifying participants were randomly selected from YouthSight’s Applicant and Student panels, which are the UK’s premier source of higher education sample¹. All applicants confirmed that they intend to begin their studies in Sept 2016.

New survey features

Each year, the questionnaire is amended and a different set of questions on a topic of interest is added. In 2015, questions covering apprenticeships and employability were added and these have been continued in the 2016 survey.

This year, questions have been added regarding the importance of the TEF in future university choices and the factors that make it difficult for students to cope at university.

¹ Panellists are recruited each year to these panels through a special agreement with UCAS and screened to ensure their identity and collect background demographics.

A choice-based conjoint analysis exercise (CBC) investigating different accommodation scenarios is usually included in the study. Based on diminishing returns of running this analysis every year, this has been substituted for a MaxDiff analysis exercise investigating what is important to participants in selecting a university. Further methodological details on this analysis are given later in the report.

Notes on the report

As the survey sample is composed of both applicants and first year students, descriptions of the sample at the overall level are made of ‘participants’. This refers to all who completed the survey.

Throughout ‘students’ refers only to first year students as no other students were sampled for this report. Similarly, ‘applicants’ describes only applicants to UK universities.

Differences between subgroups (i.e. students versus applicants, differences between genders, etc) are described only if the difference is considered significant at the 95% confidence level.

In charts, the following key is used:

*	Significantly different to other subgroups in chart
^	Significantly higher than the previous year
v	Significantly lower than the previous year

Notes on data from previous years

Throughout the report, comparison is made with data from previous years whenever possible (usually only limited by questionnaire changes since the original survey in 2014). However, it should be noted that prior to 2012 and 2013 the sample was representative (by way of quota groups and weighting) of all undergraduate students rather than limiting student recruitment, quotas and balancing to first year university students only (representative here means proportionate by gender and age).

In order to make appropriate comparisons to 2012 and 2013, data from these years excludes all students except first year students.

The change in sampling in 2014 was made in order to better suit the objectives of investigating expectations of and reactions to purpose-built accommodation, which is used most frequently in the first year of university.

Executive Summary



Executive summary

Having a good student experience

Satisfaction for the non-academic side of the student experience is higher among first year students who live in purpose-built student accommodation (across a number of factors). UPP should consider messaging on this as it demonstrates the value of their role.

Students who live in purpose-built accommodation emphasise a good accommodation experience and meeting new friends as especially important to them. UPP should emphasise the importance of the social side of purpose-built student accommodation.

There is some evidence that students who choose to live in purpose-built student accommodation cope less well with feeling lonely and living independently (they may be less likely to be independent to begin with). UPP should consider their strategy for addressing stress and coping among tenants

Key Details

- Making new friends, good campus atmosphere and variety of things to do are the most important aspects of a good student experience (outside of academics) as in previous years
- Students who live in purpose-built student accommodation are much more likely to have had a good accommodation experience and are more satisfied with their non-academic experience across a number of factors
- The stress of studying, financial difficulties and loneliness are the top three things that make it difficult for students to cope at university

Accommodation choices and preferences

Year on year, this report has observed that the majority of applicants expect to live in purpose built student accommodation, the majority of first year students live in purpose-built accommodation and purpose-built accommodation remains the preferred option.

That there is no evidence of changing expectations, choice or preference in terms of first year accommodation could be considered surprising given widespread focus on financial pressures on students and assumptions that these would lead to different accommodation choices.

However, as financial pressures are a key reason for not going into purpose-built student accommodation, UPP should continue to monitor changes in student finance and degree fees which could lead to lower uptake of purpose-built student accommodation in the future.

The comparative lack of demand for purpose built student accommodation in the second year onwards should inform UPP's own strategy with regards to the second year market, namely that those who did not live in purpose-built accommodation in the first year are unlikely to want to enter such accommodation later.

Key Details

- In 2016, first year accommodation is largely consistent with previous years in terms of where applicants expect to live, where students actually do live and where both applicants and students prefer to live
- This means that applicants have generally accurate expectations and students largely live where they would prefer to
- More students and applicants expect to live or report living at purpose-built student accommodation at Russell Group universities compared to other institutions
- Expense is by far the primary reason for not living in purpose-built student accommodation among those who would prefer to
- Preference for living in purpose built student accommodation remains low in the second year onward

Accommodation satisfaction and preferred features

Satisfaction with campus accommodation is somewhat down this year, showing the need for providers to maintain quality or improve perceptions among students (especially cleanliness, which saw a drop in satisfaction this year and is a relatively important accommodation factor, especially to men).

With that said, institutions should continue to add value for students and applicants by investing in the quality of campus accommodation, given the high rated importance of quality accommodation among those who will use it compared to other factors. UPP should continue to focus on common areas in accommodation as a high proportion of participants attributed value to common rooms in ensuring that they have a great time at university. Of other specific accommodation features, en-suite bathrooms remain highly desirable (and should be emphasised to applicants in particular who can be anxious about sharing and who ultimately make first year accommodation arrangements).

Location and rent remain the most important accommodation factors that drive choice. However, any new buildings for UPP should be conveniently located for campus but do not actually need to be on campus (based on rated importance).

Key Details

- Accommodation remains the most important non-academic facility on campus for those who intend to use it
- Through the rated importance of common rooms, students emphasise the importance of the social value of purpose-built student accommodation in having a great time at university
- Satisfaction with accommodation on campus is highly positive but is down from last year (with several other factors)

- Location and rent remain the most important aspects when choosing purpose-built accommodation. Of the accommodation features themselves, en-suite bathrooms remain highly desirable (especially to applicants who may have more concern over sharing than students end up having)
- Students are generally satisfied with the location of their purpose-built student accommodation but less so in terms of rent

Importance of factors in university choice

Currently, university choice is based heavily on course, location and reputation. While the current focus is on institutions offering value for money, prior to the launch of the TEF, the majority did not cite employability as a factor in their choice of university. However, high importance attributed to careers support and the possibility of work placement may indicate more of an employability focus in 2016 students and applicants (MaxDiff analysis).

The majority of participants indicated that the TEF could impact on their university choice and this could lead to big changes in how decisions are made in the future.

Key Details

- Course, reputation and location remain the most important factors in choosing between universities
- Employability is the fourth most important characteristic and (at least in terms of stated importance) shows no growth in importance from last year
- When examining more specific attributes of university choice, those with the highest importance (beyond academic provision) are accommodation (among those who use it or are likely to), career support and student support in general
- Of the more specific offerings included in the MaxDiff analysis, accommodation was considered more important in university choice (by those who use it or expect to) than student support services.
- High importance attributed to careers support and the possibility of work placement may indicate a beginning of more of an employability focus in 2016 students and applicants, though no increase in the overall importance of employability is seen in the trended data
- Attributes that are less important than average include transport links, clubs and societies and an attractive campus, among others
- At this early stage, students are very open to the idea that the TEF would influence their university choice in the future

Considering apprenticeships as an alternative to university

Wanting to study a particular course and have the full ‘uni experience’ are as much of a pull for degrees as the improved employment prospects they will get upon graduating. In addition, the lower employment prospects and salaries associated with non-degree options remain a barrier to considering apprenticeships.

This is interesting considering degree apprenticeships / higher apprenticeships are a focus for government and industry alike.

Key Details

- More than six in ten participants claim that they considered alternatives to university. It is unclear how many applicants seriously considered apprenticeships as an alternative to university. As seen by the difference between applicants and students, it is easy to over-emphasise the level of consideration.
- Around a fifth of university applicants considered applying for an apprenticeship
- The reasons for applying to university instead of apprenticeships are varied but salary and career qualifications are an important factor among them
- Lower employment prospects and salaries associated with apprenticeships remain a barrier.
- Gaining a degree qualification as well as working under an apprenticeship scheme would make apprenticeships more appealing to the majority

Employability

Institutions should consider strengthening their offering with regards to improving the employability of students as it would be well received. Communicating this offering is key.

Students and applicants have an open mind to a greater role being played by employers in enhancing their employability and so institutions could consider partnerships and collaborations with employers that could help them to share the burden of enhancing the employability of their students and thus enhancing their reputation.

Applicants and students appear to be somewhat naïve about enhancing their own employability. They would prefer employers to reach proactively out to them and yet rate themselves highly in managing their own employability. It could be that student support services need to emphasise what students can do for themselves.

The majority of students would pay more for their degree in return for demonstrated employability shows the growing importance of employability in university choice. However, the number who would do so is trending downward, showing that this is also a likely limited by perceptions of growing financial pressure on students

Key Details

- The majority of students and applicants feel that there is more that universities can do in order to improve employability and around four in ten also feel that employers could do more.
- Over half of students do not feel that employers do not offer enough work placements/internships for university students
- Around three quarters of students and applicants feel that they are doing enough to improve their own employability
- As in previous years, around seven in ten students would pay more for their degree if employability was assured (65%), though this is trending downward year-on-year (from 73% last year, likely due to perceived financial pressures)

Main Report



Good student experience

Summary

- Making new friends, good campus atmosphere and variety of things to do are the most important aspects of a good student experience (outside of academics) as in previous years
- Students who live in purpose-built student accommodation are much more likely to have had a good accommodation experience and are more satisfied with their non-academic experience across a number of factors
- The stress of studying, financial difficulties and loneliness are the top three things that make it difficult for students to cope at university

Implications

- UPP should consider messaging on the higher satisfaction among first year students who live in purpose-built student accommodation across a number of factors as it demonstrates the value of their role.
- For those in purpose-built student accommodation, having a good accommodation experience and meeting new friends are considered especially important, emphasising the importance of the social side of purpose-built student accommodation
- There is some evidence that students who choose to live in purpose-built student accommodation cope less well with feeling lonely and living independently (they may be less likely to be independent to begin with). UPP should consider their strategy for addressing stress and coping among tenants

Making new friends, good campus atmosphere and variety of things to do are the most important aspects of a good student experience (outside of academics)

The most important aspects of a good student experience (aside from academics) are the new friends made, the good campus atmosphere and variety of things to do.

However, there are some changes this year compared to previous years². New friends made remains the most important factor but is cited by fewer participants than in previous years (65%, down 12 percentage points since 2014). This seems to be part of a wider trend of lower importance scores this year. Last year, reasonable prices at social venues was the third most cited important factor but is less cited this year (44%, down 14 percentage points since 2014) as is a good accommodation experience (46%, down 8 percentage points). No aspects of a good student experience were cited by significantly more participants this year.

A good campus atmosphere is significantly more important to applicants than students (68% vs. 57%) and is the most important factor for applicants, perhaps due to the fact that they are still window-shopping. Males value a variety of things to do more than females (58% vs. 50%). Those attending or expecting to attend Russell group universities are more likely to cite good accommodation experience (51%) and enough time to socialise (45%) as important.

Participants who have lived in purpose-built accommodation or expect to and others consider a number of factors to be significantly more important. They strongly value a good accommodation experience (60%, significantly higher than the 17% among others) and also new friends made, variety of things to do and enough time to socialise. The only factor which is more important to those who did not live or do not expect to live in purpose-built student accommodation is support with non-academic issues, perhaps reflecting the lack of support available that is sometimes offered with purpose-built accommodation.

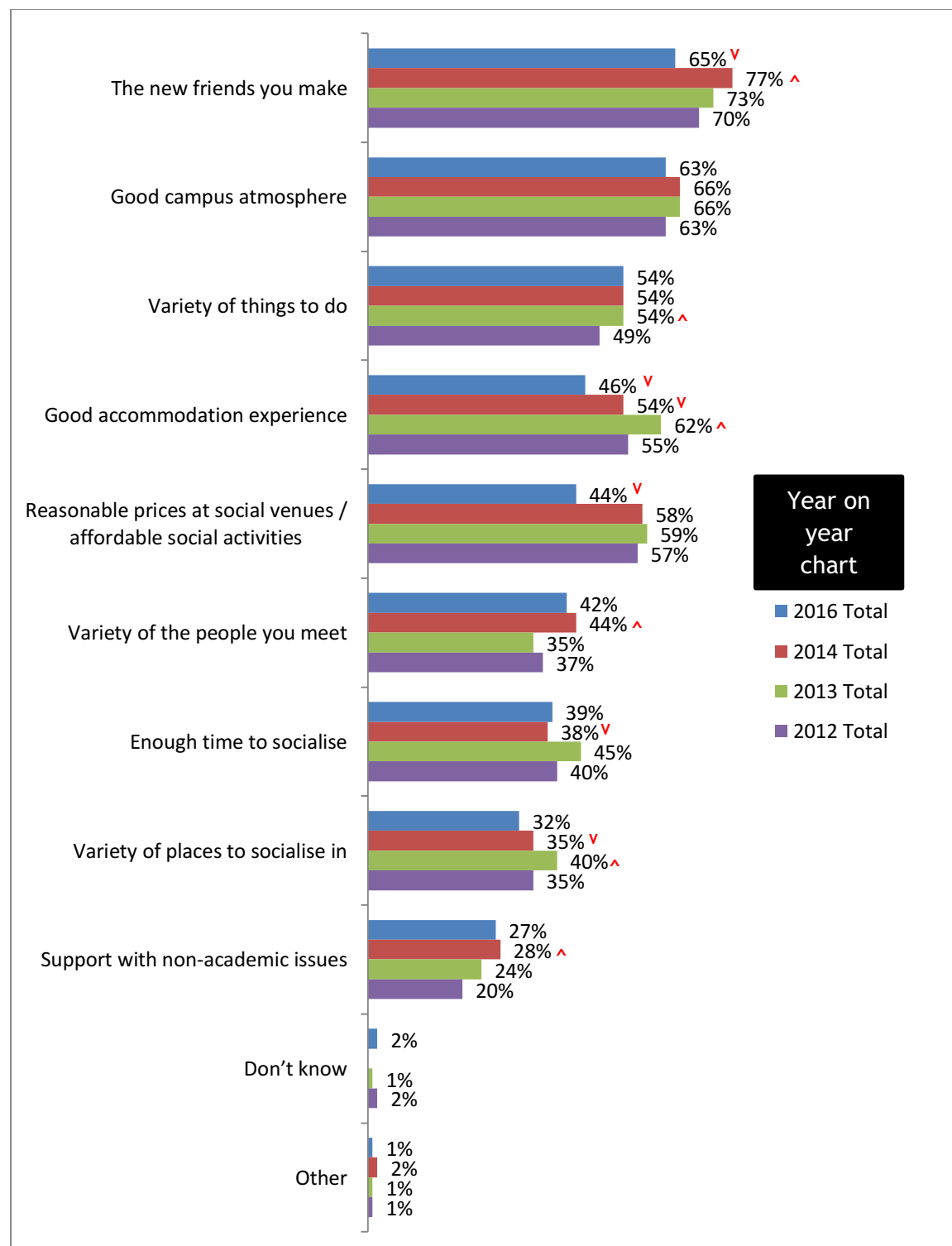
Implication:

For those in purpose-built student accommodation, having a good accommodation experience and meeting new friends are considered especially important. This emphasises the importance of the social side of purpose-built student accommodation.

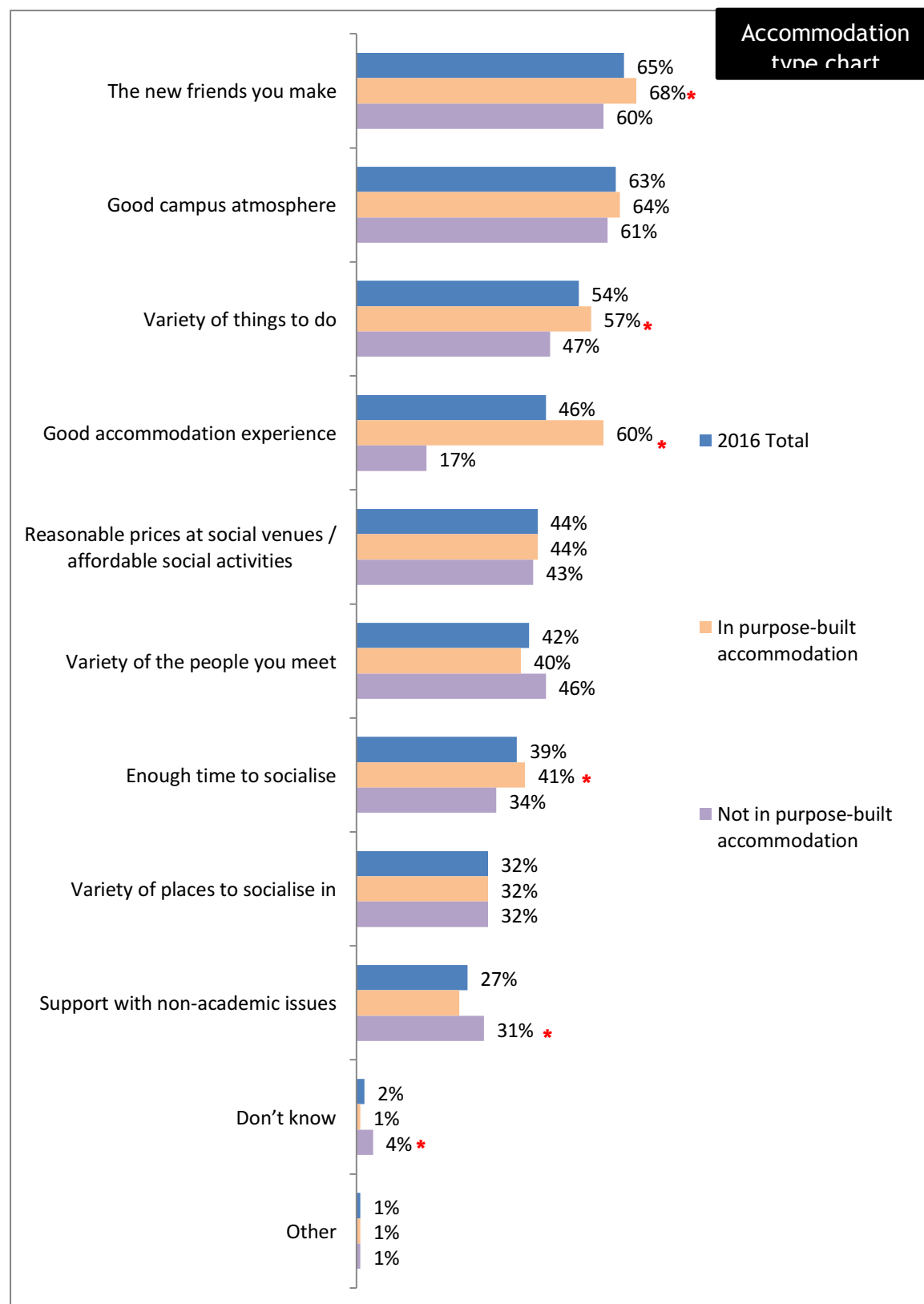
That many aspects of non-academic student life were considered less important this year could imply that the non-academic aspects of student life were considered less important overall.

² Question omitted from survey in 2015.

QC3 Some young people like you have told us what they consider to be a GOOD NON-ACADEMIC EXPERIENCE at university. How important are these things to you? Chart shows important or very important. Base: 550 applicants and 558 students (1108 participants in total, 1459 in 2014, 680 in 2013 and 1039 in 2012)



QC3 Some young people like you have told us what they consider to be a GOOD NON-ACADEMIC EXPERIENCE at university. How important are these things to you? Chart shows important or very important. Base: 1108 participants (756 who live in or expect to live in purpose-built student accommodation and 352 who don't)



Students who live in purpose-built student accommodation are much more likely to have had a good accommodation experience and are more satisfied with their non-academic experience across a number of factors.

As mentioned, good campus atmosphere, new friends and variety of things to do are the most important aspects of a good experience for students. Satisfaction for all of these aspects is very high among students (82%, 84% and 80% respectively very or quite satisfied) and in fact a good campus atmosphere is the element students are most satisfied with overall.

Students who lived in purpose built student accommodation were hugely more likely to state that they had a good accommodation experience than others (71% vs. 26%). They were also more likely to give higher ratings for the campus atmosphere (86% vs. 77%), variety of things to do (83% vs. 71%), variety of people met (82% vs. 74%), enough time to socialise (81% vs. 73%) and variety of places to socialise (78% vs. 67%).

The aspects that students are most dissatisfied with are the accommodation experience and reasonable prices at social venues (both 23% not very or not at all satisfied).

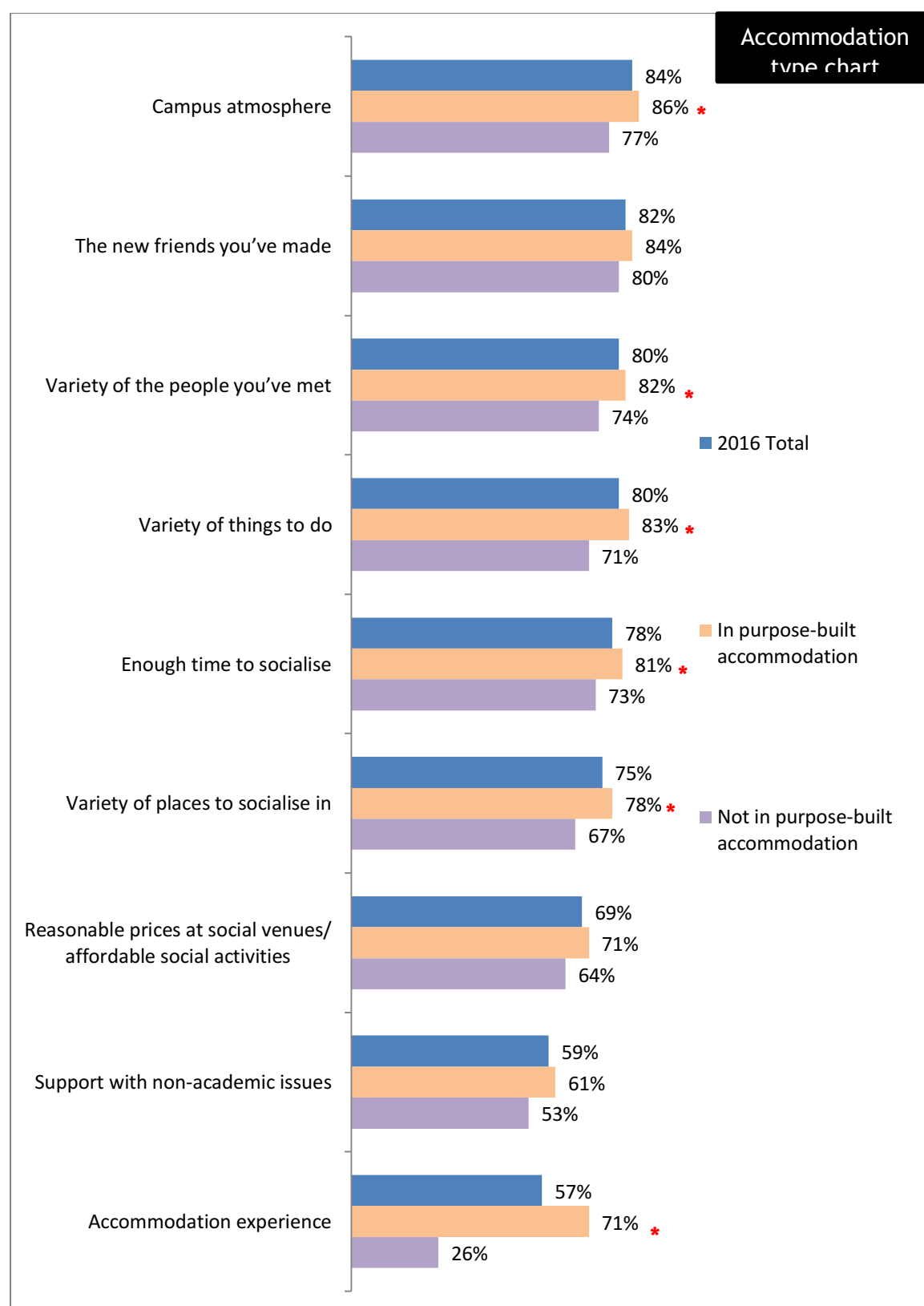
Interestingly, as well as making new friends being considered less important by all participants, students are also less satisfied with the experience of doing so this year compared to previous years³ (82%, down 7 percentage points from 2014). Linked to this, satisfaction is also lower with the variety of people met (80%, down 7 percentage points from 2014) and campus atmosphere (down 4 percentage points from 2014). While the percentage of students who are satisfied in terms of accommodation experience remains roughly the same, the percentage of students who say that they were not satisfied is higher (23% up 5 percentage points).

Implication:

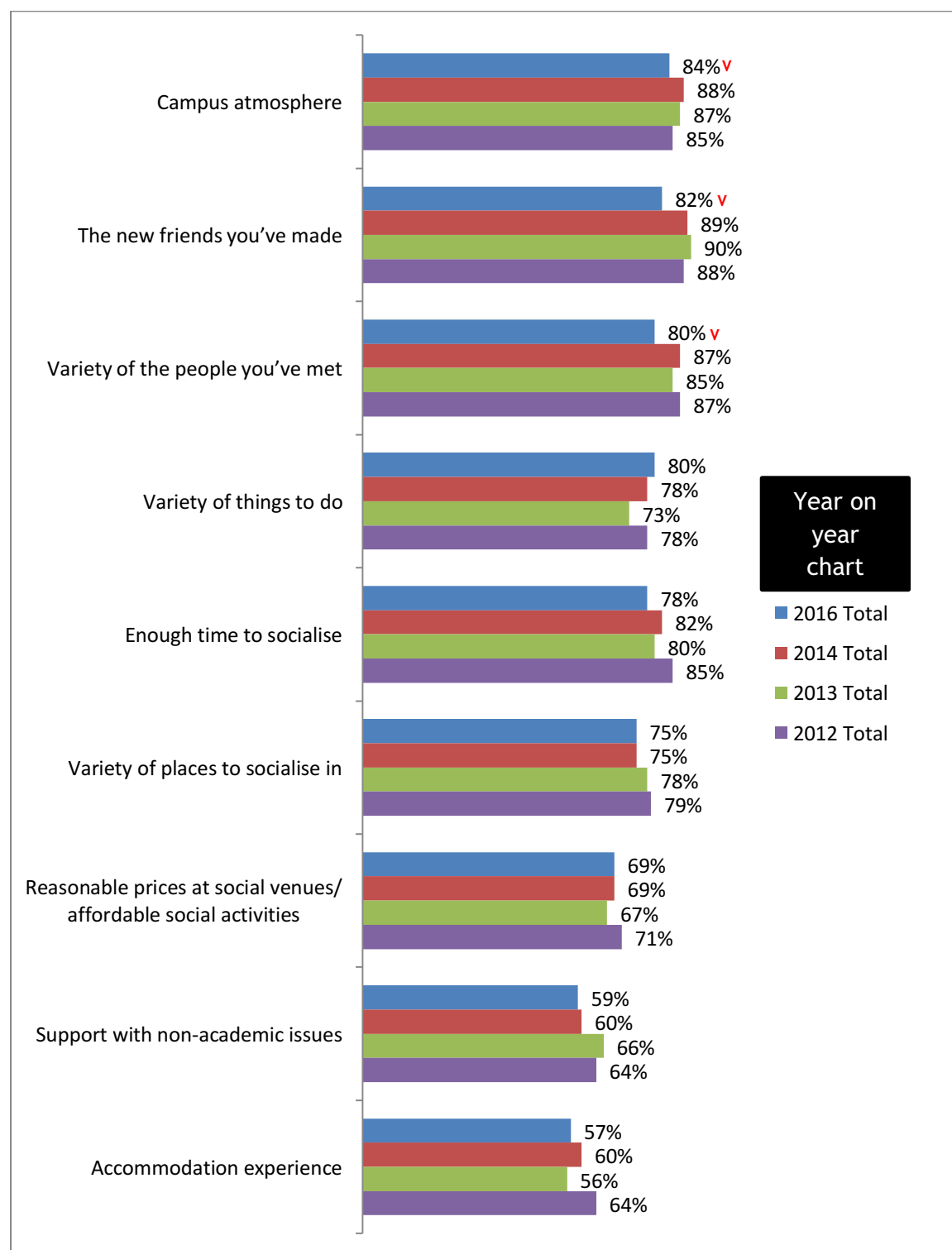
UPP should consider messaging on the higher satisfaction among first year students who live in purpose-built student accommodation across a number of factors as it demonstrates the value of their role.

³ Question omitted from survey in 2015

QC4 How SATISFIED are you with your non-academic experience so far? Base: 558 students (386 who lived in purpose-built student accommodation and 172 who did not)

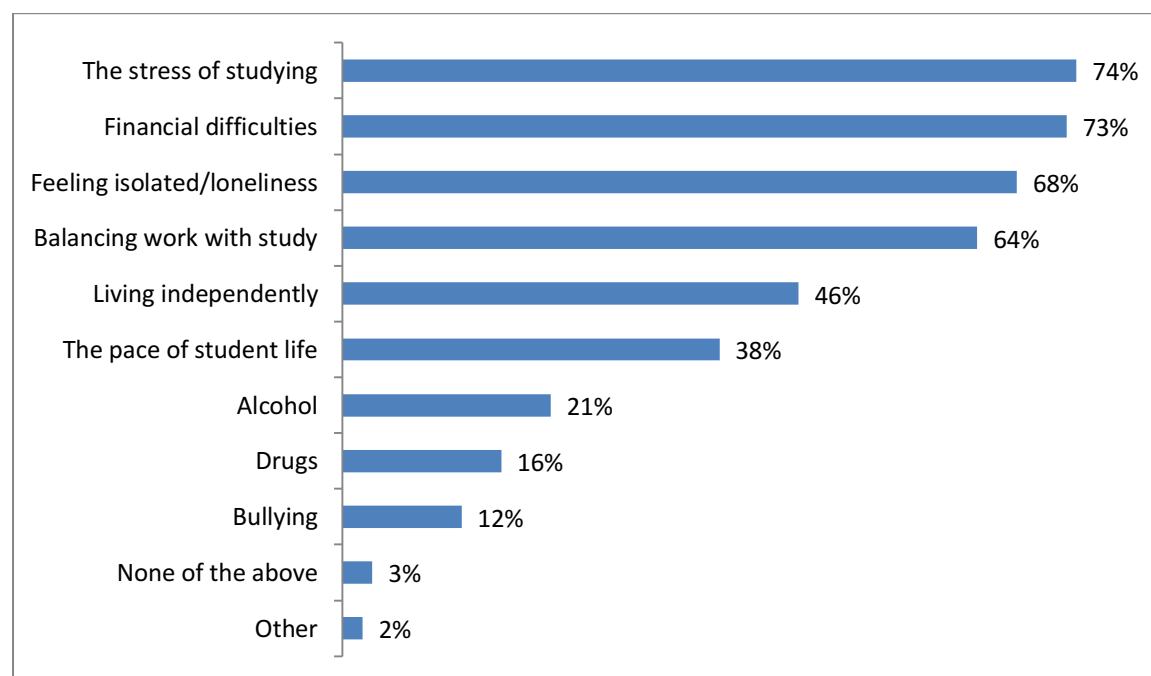


QC4 How SATISFIED are you with your non-academic experience so far? Base: 558 students (730 in 2014, 180 in 2013 and 288 in 2012)



The stress of studying, financial difficulties and loneliness are the top three things that make it difficult for students to cope at university

QR2. Some people find university difficult. Which of the following make it difficult for students to cope while at university? Base: 558 students



Stress of studying, financial difficulties and loneliness were mentioned more frequently by women (81%, 76% and 73%). Drugs were mentioned more frequently by men (20%).

Students who lived in purpose-built student accommodation were more likely to say that feeling lonely makes it difficult for students to cope (72% vs. 58%) and also more likely to mention difficulties with living independently (50% vs. 38%). The latter may illustrate different levels of independence in the kinds of students that choose to live in purpose-built accommodation vs. those who do not. Those who are not living in purpose-built accommodation were more likely to mention balancing work with study (71% vs. 61%) and bullying (17% vs. 10%) as issues.

This is a new question for 2016 so no trending data is available.

Implication:

There is some evidence that students who choose to live in purpose-built student accommodation cope less well with feeling lonely and living independently (they may be less likely to be independent to begin with). UPP should consider their strategy for addressing stress and coping among tenants.

Accommodation usage and preferences

Summary

- First year accommodation is largely unchanged in terms of where applicants expect to live, where students actually do live and where both applicants and students prefer to live.
- This means that applicants have generally accurate expectations and students largely live where they would prefer to.
- More students and applicants expect to live or report living at purpose-built student accommodation at Russell Group universities compared to other institutions
- As seen in previous years, a significant proportion of those who live at home would not prefer to do so, likely due to cost factors: Expense is by far the primary reason for not living in purpose-built student accommodation among those who would prefer to.
- Preference for living in purpose built student accommodation remains low in the second year onward.

Implications

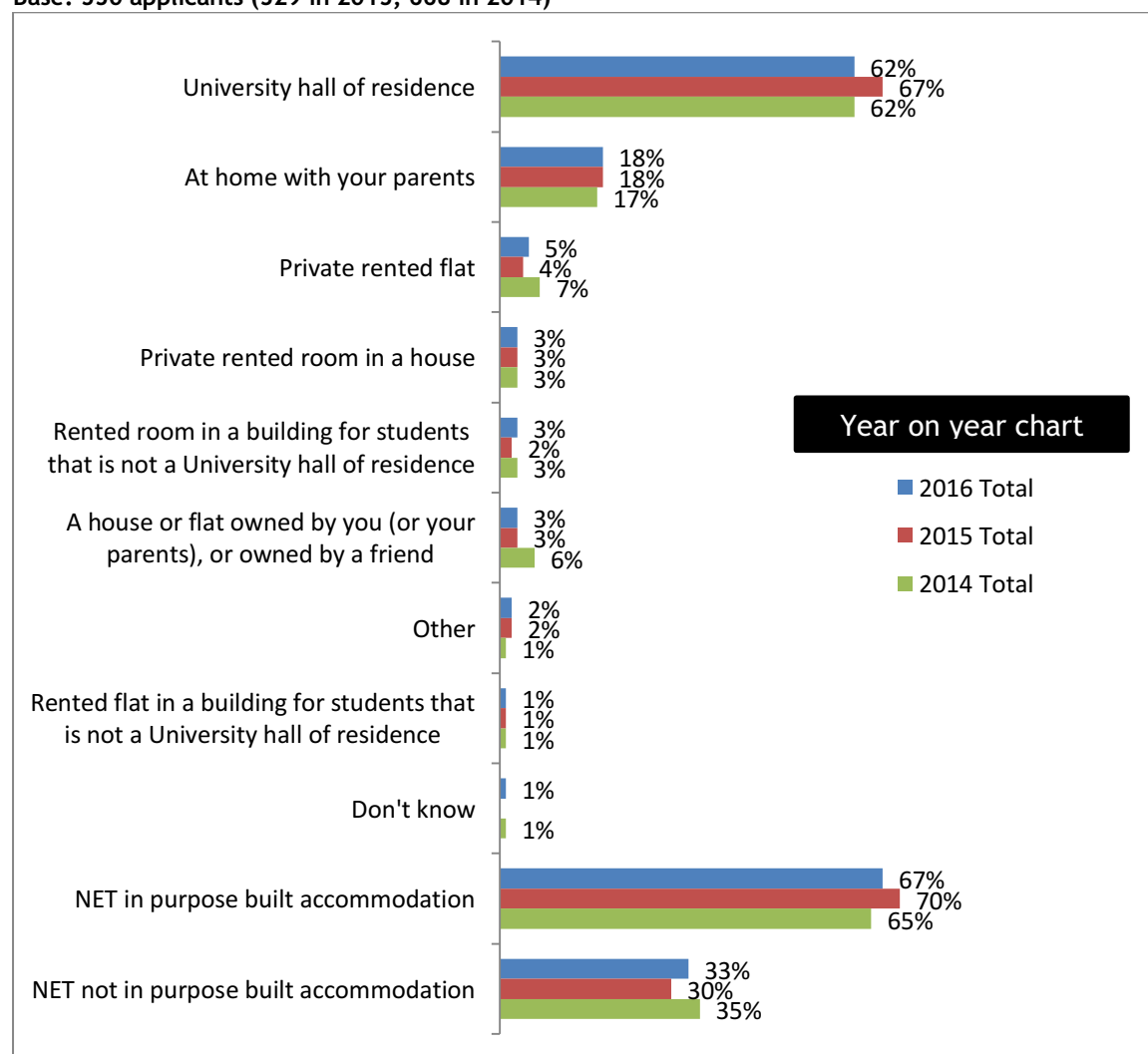
- There is no evidence of changing expectations, behaviour or preference in terms of first year accommodation shown in the data as yet, despite widespread focus on financial pressure on students.
- However, as financial pressures are a key reason for not going into purpose-built student accommodation, UPP should continue to monitor changes in student finance and degree fees which could lead to lower uptake of purpose-built student accommodation in the future.
- The comparative lack of demand for purpose built student accommodation in the second year onwards should inform UPP's own strategy with regards to the second year market, namely that those who did not live in purpose-built accommodation in the first year are unlikely to want to enter such accommodation later.

Applicants' first year accommodation expectations are largely unchanged with the majority continuing to expect to live in purpose built accommodation (especially Russell Group applicants)

Expected accommodation arrangements for applicants remain highly stable, consistent with data from the last two years (i.e. no statistically significant changes). As in previous years, around two thirds of applicants expect to live in some form of purpose-built student accommodation (67%)⁴, mainly university halls of residence (62%). Just less than a fifth of applicants expect to live at home with parents (18%) and the remainder live elsewhere.

As before, those applying to Russell group universities as their first choice option are significantly more likely expect to live in university halls (77%) while those applying to universities outside of this group are significantly more likely to expect to live at home (22% vs. 12% among Russell group students) or in a privately rented flat (6% vs. 2%). This means that 80% of Russell group applicants expect to live in purpose-built student accommodation, compared to only 60% applying elsewhere.

QN2. Which of these best describes where you will live during term time in your FIRST year at university?
Base: 550 applicants (529 in 2015, 668 in 2014)



⁴ Including university halls of residence and rented rooms or flats in a building for students that is not a university hall of residence.

Implication:

Despite the perception of increased cost pressures on students, there is no change in applicants' demand for purpose-built student accommodation.

First year students' accommodation arrangements match closely where applicants expect to live, as in previous years

Consistent with last year's survey, where applicants expect to live and where students actually end up living are very consistent with a very similar proportion choosing to live in purpose-built student accommodation. In fact, the only difference is that significantly fewer students live in privately rented flats (3%) than applicants expect to (5%). Last year, this difference was not observed and in fact fewer students are living in privately rented flats since last year (down 2 percentage points). As the applicants' expectations have not changed, this difference may be down to factors outside their control such as increases in rent prices or decreases in supply. Though the change is statistically significant, it is small and similar to levels seen in 2012.

Other than this, accommodation choices made by first year students are highly stable and consistent with past data. As seen in all five years of data, around two thirds of first year students live in some form of purpose-built student accommodation (69%), mainly university halls of residence (64%). One fifth of first year students live at home with parents (20%) and the remainder live elsewhere.

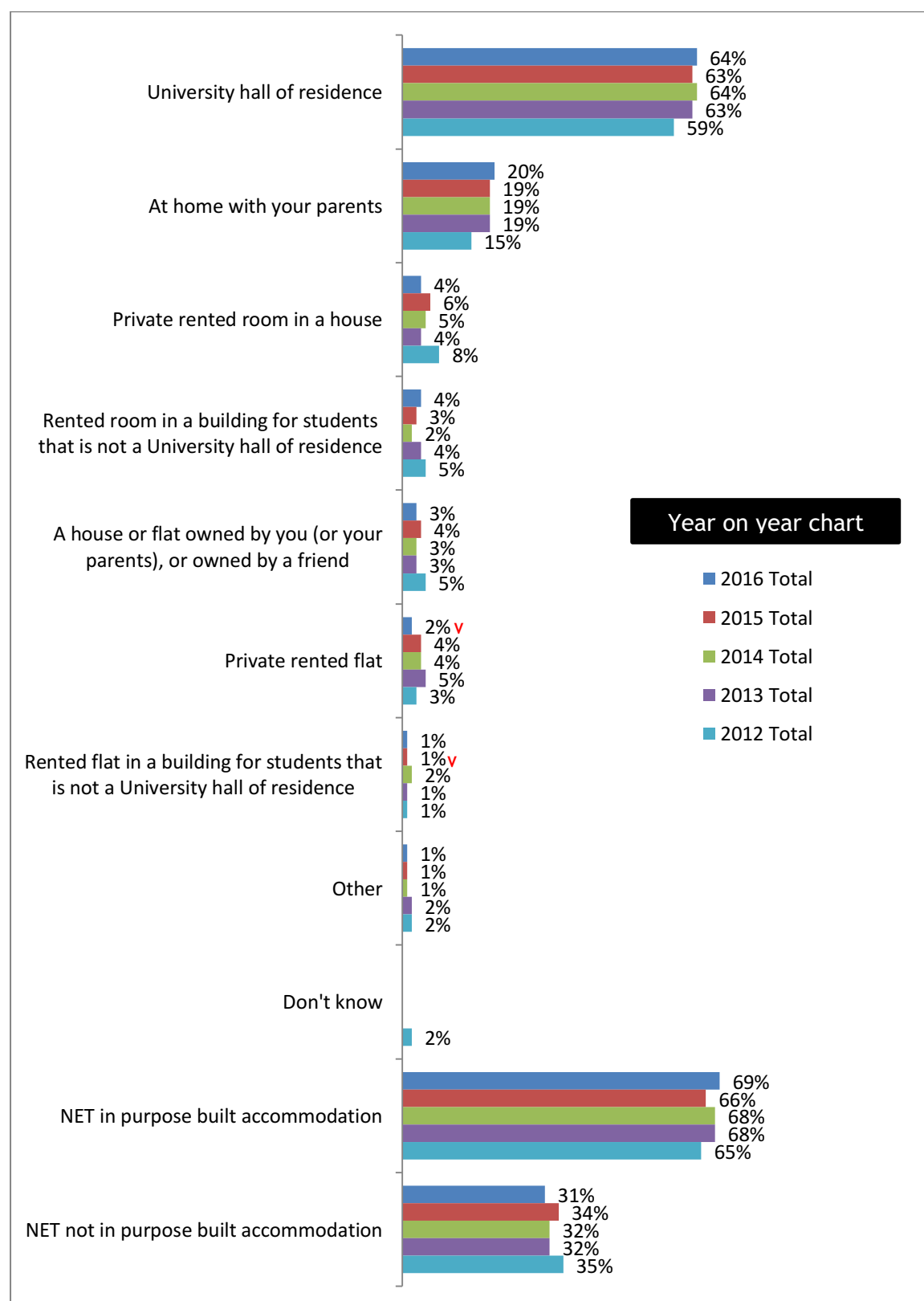
As with applicants (and student data in previous years), those attending Russell group universities are significantly more likely to be living in university halls (75%) while those attending universities outside of this group are significantly more likely to be living at home (23% vs. 14% among Russell group students).

Implication:

In 2016, there was no particular increase in the proportion living at home and a small reduction in the proportion living in privately rented flats, despite these options often being highlighted as cost saving options. Students continue to live in university halls and purpose-built student accommodation despite perceived pressures on living costs.

QD1. Which of these best describes where you lived during term time in your FIRST year at university?

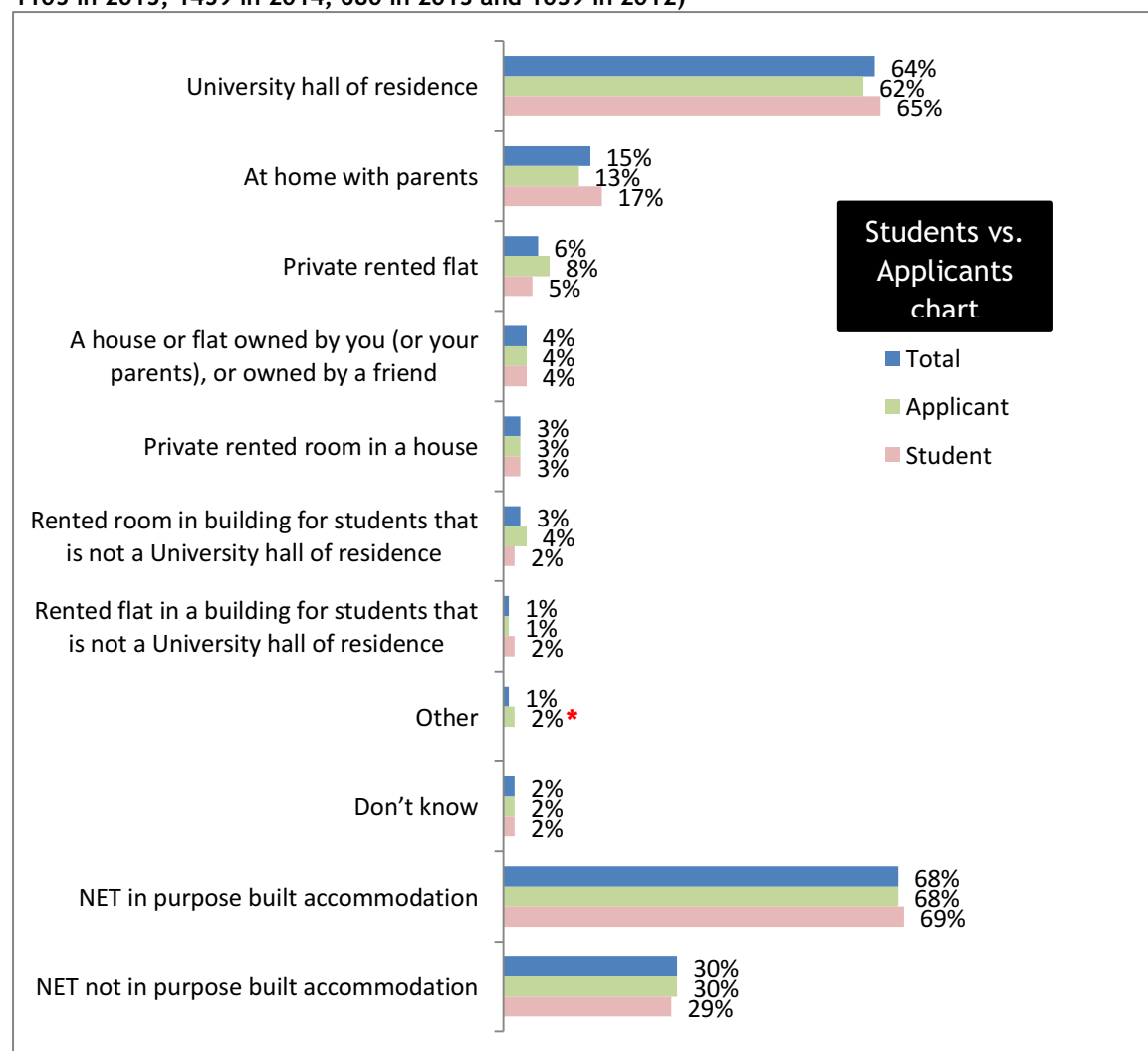
Base: 558 students (576 in 2015, 791 in 2014, 180 in 2013 and 288 in 2012)



Both students and applicants prefer to live in university halls (and largely are able to)

Both students and applicants were asked where they would prefer to live or would have preferred to have lived at university. There are no meaningful differences in preference between students and applicants.

QD1. Which of these best describes where you lived during term time in your FIRST year at university?
QD2. Which of these best describes where you'd like to live / you would have liked to live during term time in your FIRST YEAR at university? Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015, 1459 in 2014, 680 in 2013 and 1039 in 2012)

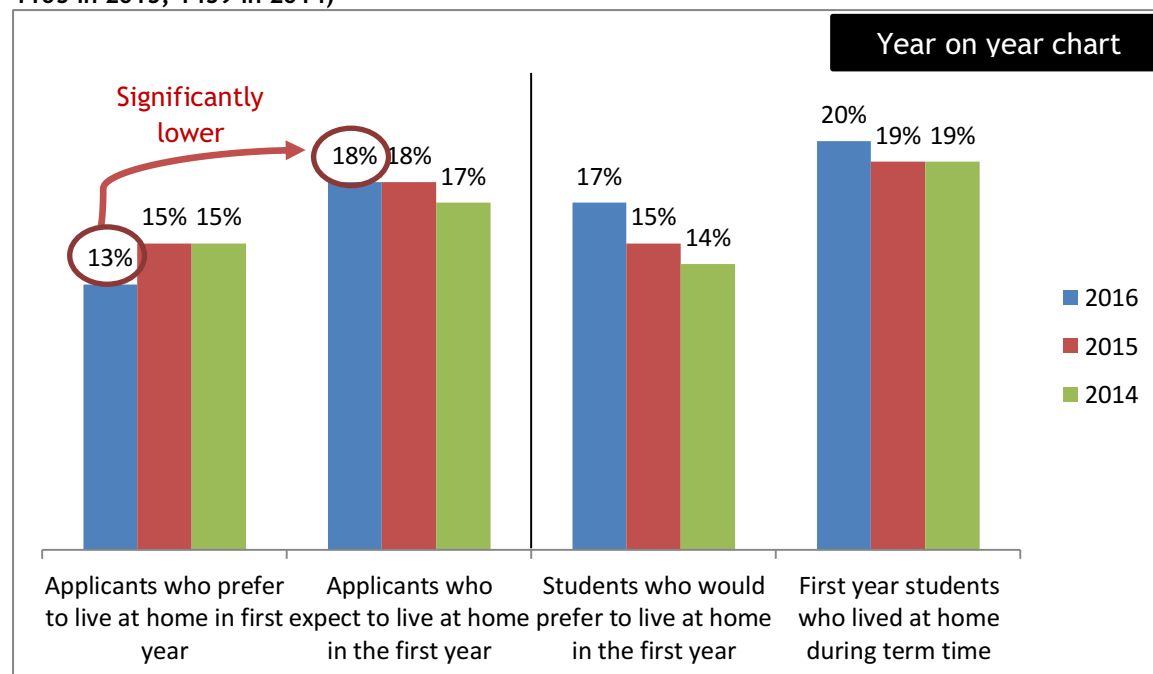


Overall, preference for purpose-built student accommodation is highest (by 68%) and specifically within that university halls of residence (64%). In this respect, preference is in line with reality (similar proportions prefer to live in purpose built accommodation to where students actually are living and applicants expect to live).

The second preference is living with home with parents (15%). The proportion of applicants that would prefer to live at home with parents (13%) is significantly lower than the proportion that expect to do so (18%) or the students who actually do (20%), indicating that for some this is expected due to financial reasons rather than being a preferred option. This effect has been observed in previous years as a phenomenon at the overall level (i.e. all participants) rather than being an observation concerning applicants

specifically, possibly due to an upward trend in the proportion of students who would prefer to live at home.

QN2. Which of these best describes where you will live during term time in your FIRST year at university?
QD2. Which of these best describes where you'd like to live / you would have liked to live during term time in your FIRST YEAR at university? Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015, 1459 in 2014)



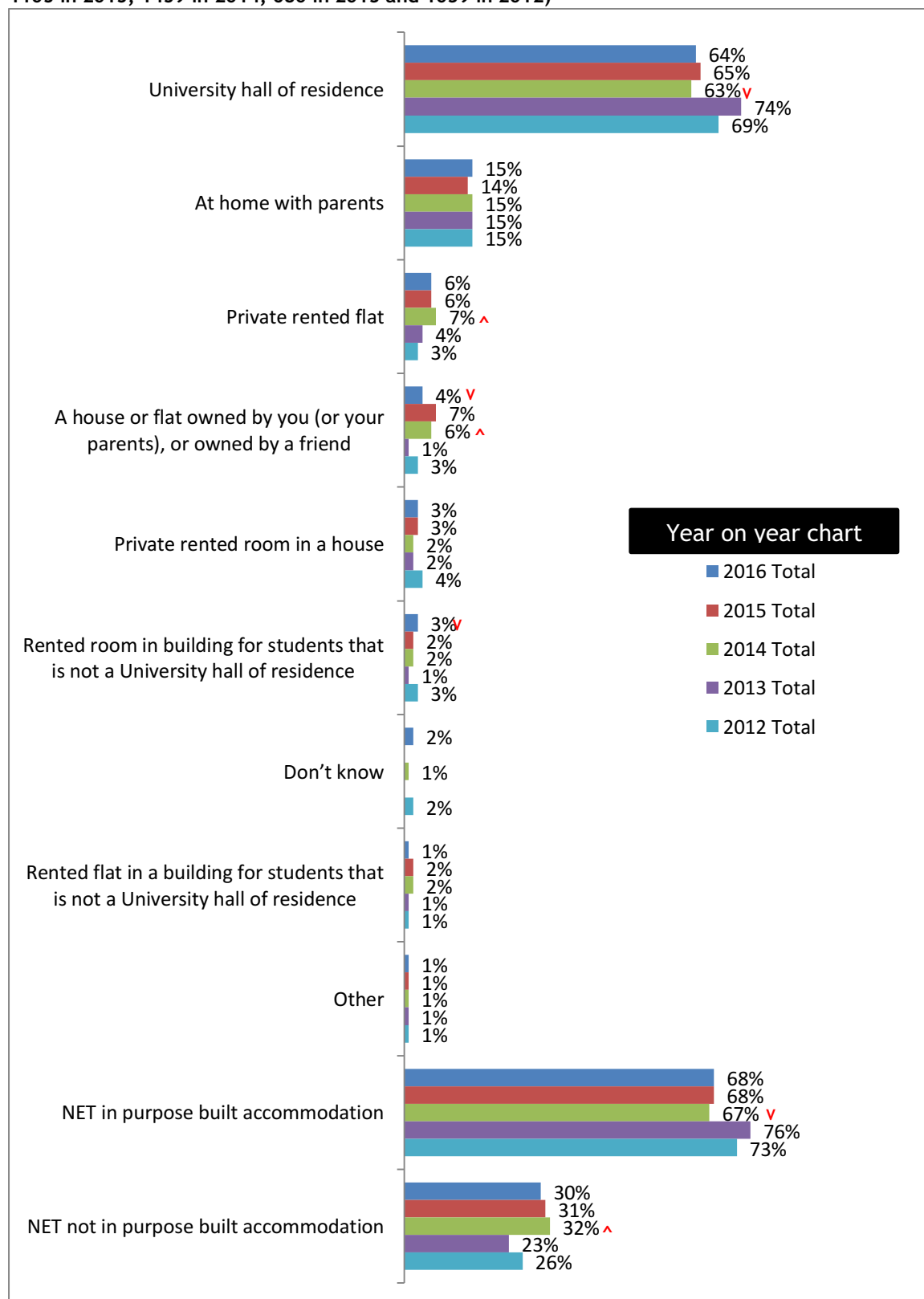
These preferences are largely in line with those seen in 2015 and 2014, following a decrease in preference for purpose-built student accommodation in 2013. The only significant difference this year compared to last is a reduction in the number of students who would prefer to live in a house or flat owned by you or your parents, or owned by a friend (4%, down from 7% in 2015), though historically the preference for this option has been the most volatile.

As in previous years, Russell Group applicants and students show a higher preference for purpose-built student accommodation than others (81%), specifically university halls of residence (76%). Conversely, applicants to and students of universities outside the Russell Group are more likely to prefer to live at home (19% vs. 8%).

Implication:

Where applicants expect to live at home, it is often by financial necessity. The majority of students and applicants prefer to live in university halls or other purpose-built student accommodation, implying continued demand.

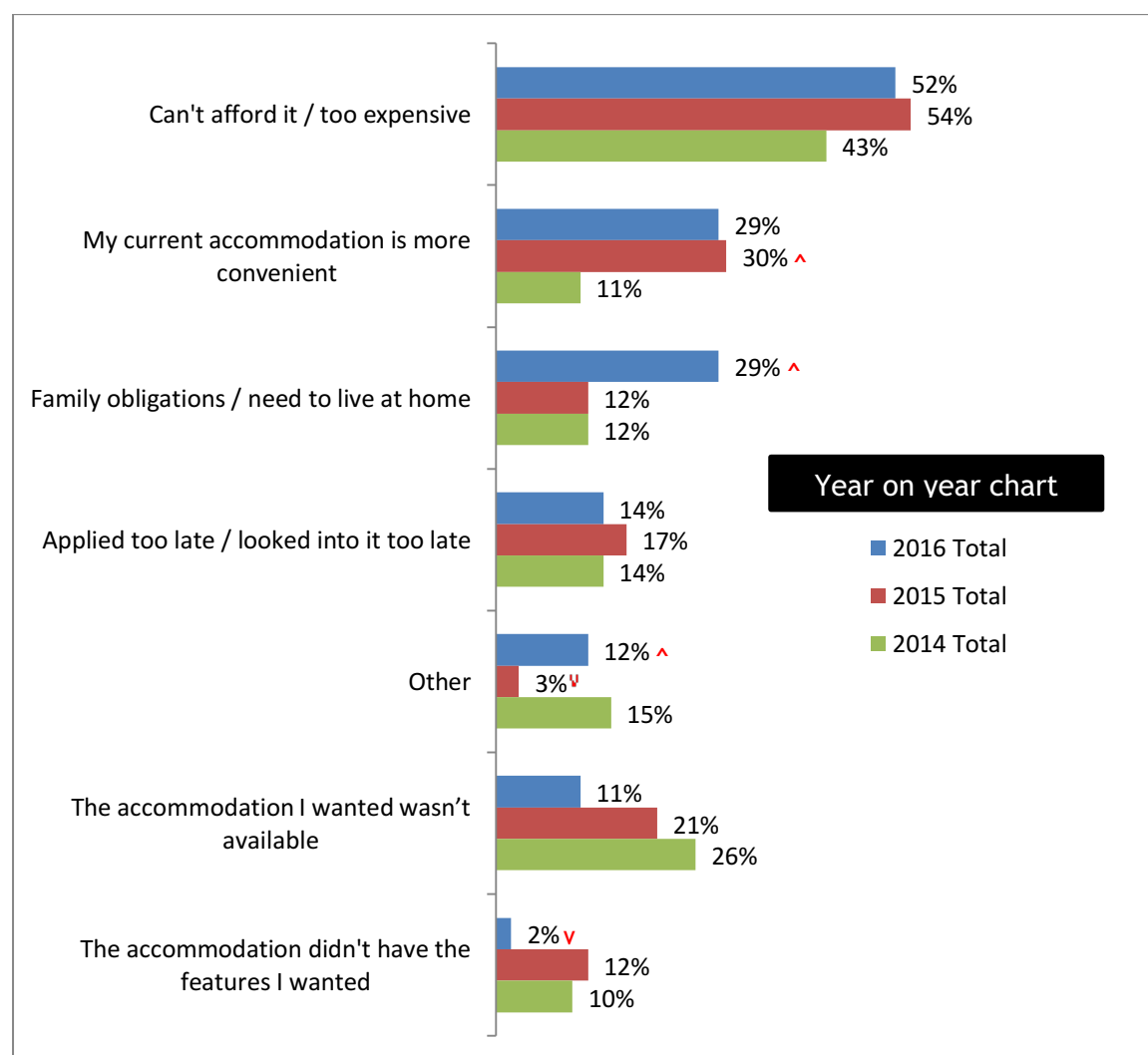
QD1. Which of these best describes where you lived during term time in your FIRST year at university?
 QD2. Which of these best describes where you'd like to live / you would have liked to live during term time in your FIRST YEAR at university? Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015, 1459 in 2014, 680 in 2013 and 1039 in 2012)



Expense is by far the primary reason for not living in purpose-built student accommodation

Where applicants and students who would prefer to live in purpose-built student accommodation but aren't able to or don't expect to be able to, the main reason is that they can't afford it (52% cite this reason). The next most important reasons are family obligations and already having convenient accommodation, both cited by just less a third (29%). Family obligations are cited by a significantly higher proportion than seen in the last two years (question added to the survey in 2014).

QN3. You've just told us that you would like to live / have liked to live in purpose-built student accommodation during your first year at university, but that you actually won't / didn't live in such accommodation. Why is this? Base: 71 participants (73 in 2015, 104 in 2014)



Due to the small base size involved, analysis between students and applicant or between demographic subgroups is not advised.

Implication:

While there is no reduction in demand observed in 2016, should university become more of an economic burden in years to come, this could impact on uptake of purpose-built accommodation, even among those who would prefer to use it.

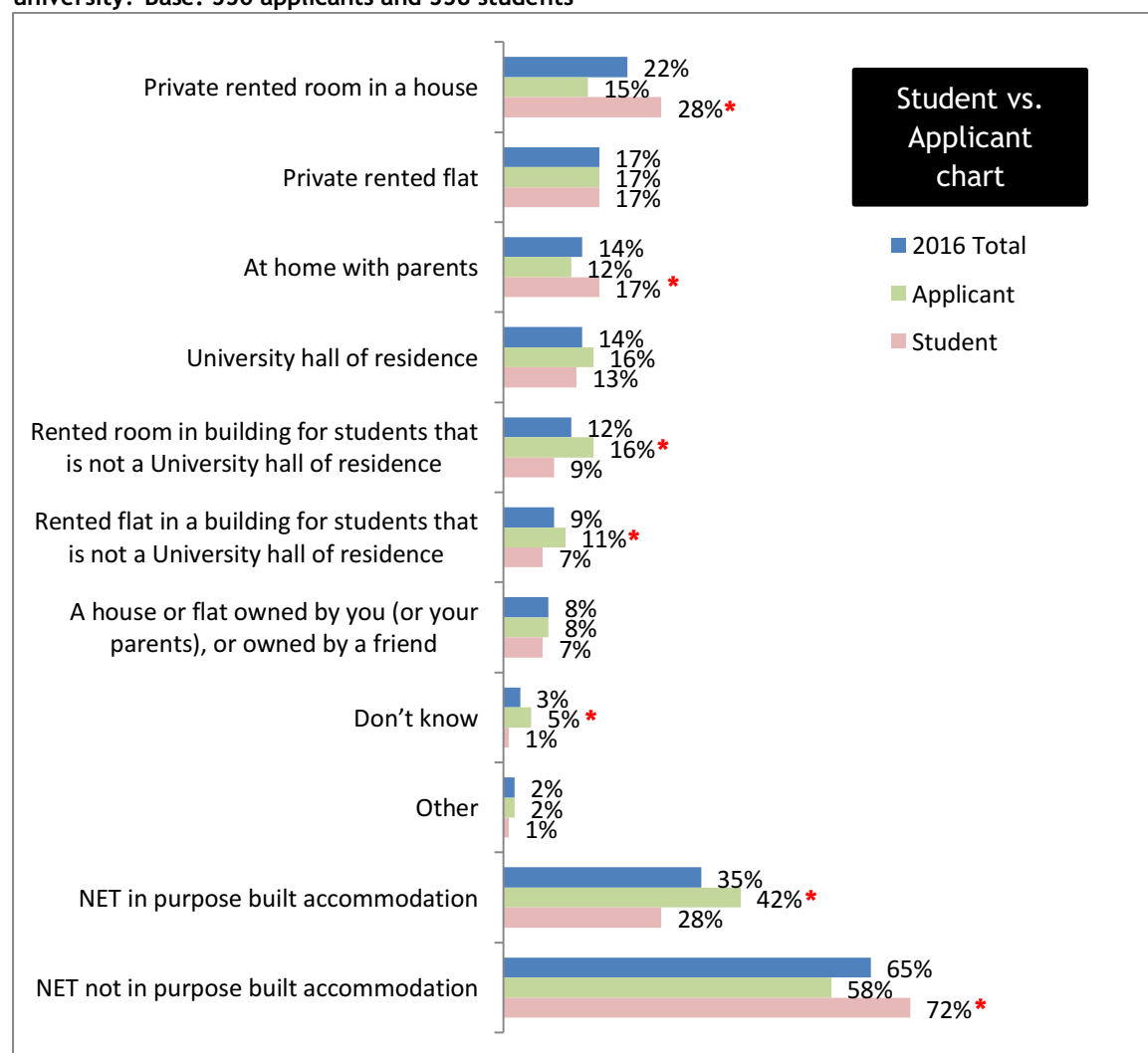
The growing importance of family commitments as a reason for not living in purpose-built student accommodation may reflect the changing demographics of UK undergraduates and wider inclusivity.

Preference for purpose-built student accommodation after the first year of university remains low

As would be expected, preference for purpose built accommodation in the second year is much lower than in the first (from 68% preference down to 35%). Participants instead prefer to live outside of purpose-built student accommodation (65%), specifically in a privately rented room in a house (22%) or a privately rented flat (17%) among other options.

Data for this year follows the trend of the previous two years, following a drop in preference for living in purpose-built student accommodation in 2013.

QD3. Which of these best describes where you'd like to live during term time AFTER your first year at university? Base: 550 applicants and 558 students



Students are more likely than applicants to say they would prefer not to live in purpose-built student accommodation after the first year (72% vs. 58%), as seen in previous years. This makes sense given that university halls are not always available to second year students and also that many second years will now wish to live with their own friends rather than those they were assigned to live with in halls.

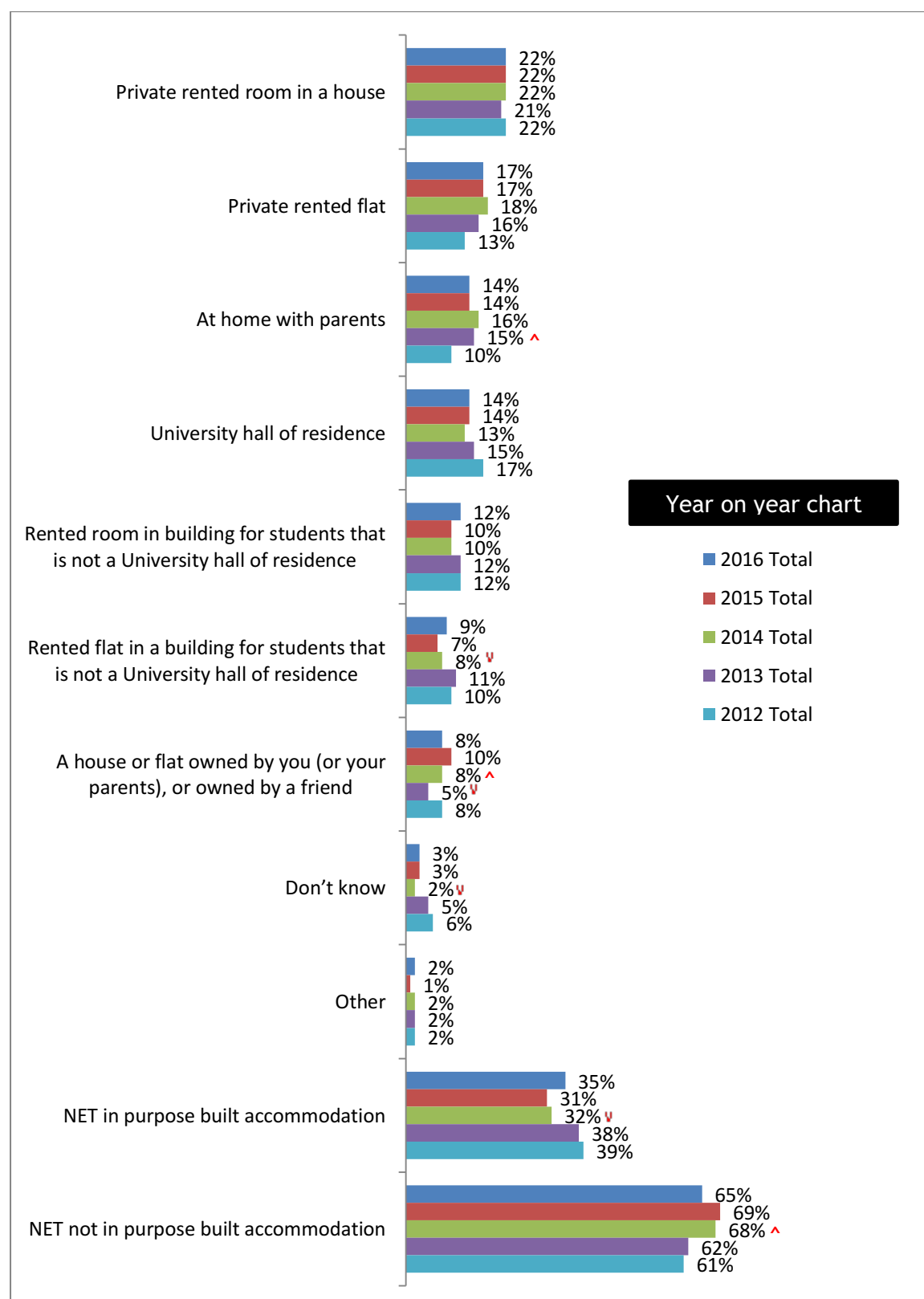
In addition, and as you would expect, those who did not live or do not expect to live in purpose-built student accommodation in the first year are also much more likely to say they would not prefer to do so in the second year (86% vs. 55%).

Finally, there is no difference in the preference whether or not to live in purpose built accommodation after the end of the first year by university group but nevertheless, students of and applicants to universities outside of the Russell Group are significantly more likely to want to live at home with parents in the second year (17% vs. 9%), just as they are in the first year.

Implication:

The comparative lack of demand for purpose built student accommodation in the second year onwards should inform UPP's own strategy with regards to the second year market, namely that those who did not live in purpose-built accommodation in the first year are unlikely to want to enter such accommodation later.

QD3. Which of these best describes where you'd like to live during term time AFTER your first year at university? Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015, 1459 in 2014)



Priorities and satisfaction with accommodation

Summary

- Accommodation remains the most important non-academic facility on campus for those who intend to use it while the importance of spaces for socialising and outside spaces should not be underestimated
- The provision of residential accommodation on campus and the provision of common rooms in accommodation on campus contribute to the student experience
- Satisfaction with accommodation on campus is positive but is down from last year
- Location and rent remain the most important aspects when choosing purpose-built accommodation
- Students are generally satisfied with the location of their purpose-built student accommodation but less so in terms of rent

Implications

- Institutions should continue to add value for students and applicants by investing in the quality of campus accommodation
- A higher proportion of participants value common rooms in student accommodation than value the residential accommodation on campus itself, which emphasises the social value of purpose-built student accommodation in having a great time at university
- There is a need for providers to maintain quality or improve perceptions of their accommodation among students (especially cleanliness, which saw a drop in satisfaction this year and is a relatively important accommodation factor, especially to men)
- Location and rent remain the most important accommodation factors that drive choice. Of the accommodation features themselves, en-suite bathrooms remain highly desirable and the value of these should be emphasised to applicants who may be anxious over sharing with other students.
- Any new buildings for UPP should be conveniently located for campus but do not actually need to be on campus (based on rated importance).

Accommodation remains the most important non-academic facility on campus for those who intend to use it while the importance of spaces for socialising and outside spaces should not be underestimated

Among those who live in purpose-built student accommodation (or expect to) to those who do not, the quality of accommodation on campus is the most important non-academic facility on campus (93% consider important, the same as last year). Obviously, this is much higher than among participants in general (79%, 82% among applicants) but illustrates that accommodation on campus is vitally important to those who plan to use it and should be considered the most important of the nine non-academic facilities tested.

Among all participants, spaces for socialising are regarded the most important non-academic facilities on the university campus (86% of participants feel it is important) when considering the importance of quality of each facility. The overall importance is up 8 percentage points since last year, returning to the levels seen prior to that. This is followed by the quality of outside spaces (84%, up 8 percentage points since last year and returning to the level seen in previous years). Across a large number of other attributes, the proportion of participants who feel each facility is important have risen above the levels seen last year to the levels seen in previous years. It is difficult to know why this would be, limited to the background data collected in this survey.

QC5. Thinking about your non-academic experience, how important do you think the QUALITY OF THE CAMPUS FACILITIES will be? / QC5. Thinking about your non-academic experience, how important is the QUALITY OF THE CAMPUS FACILITIES? Chart shows very important/quite important. Base: 1108 participants (1105 in 2015, 1459 in 2014, 680 in 2013 and 1039 in 2012)

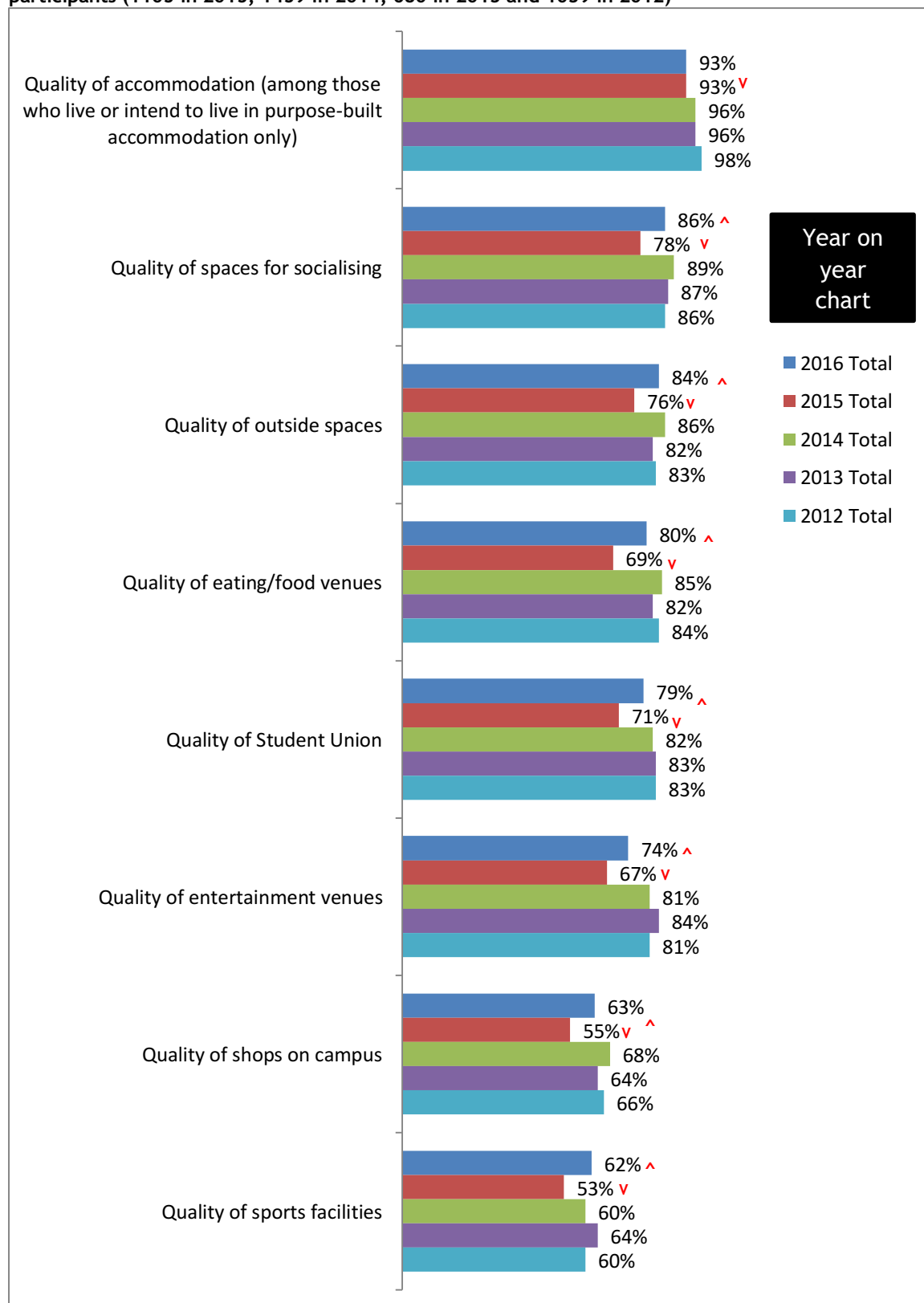
Attribute	% who feel is very/quite important
Quality of accommodation (those who live or intend to live in purpose-built accommodation only)	93%
Quality of spaces for socialising	86%
Quality of outside spaces	84%
Quality of eating/food venues	80%
Quality of accommodation (all participants)	79%
Quality of Student Union	79%
Quality of entertainment venues	74%
Quality of shops on campus	63%
Quality of sports facilities	62%

Among those who do live in (or expect to live in) purpose-built student accommodation, the quality of accommodation on campus is most important to women (95% consider important) and those attending or expecting to attend Russell Group universities (95%). There is no significant difference in the perceptions of applicants and students.

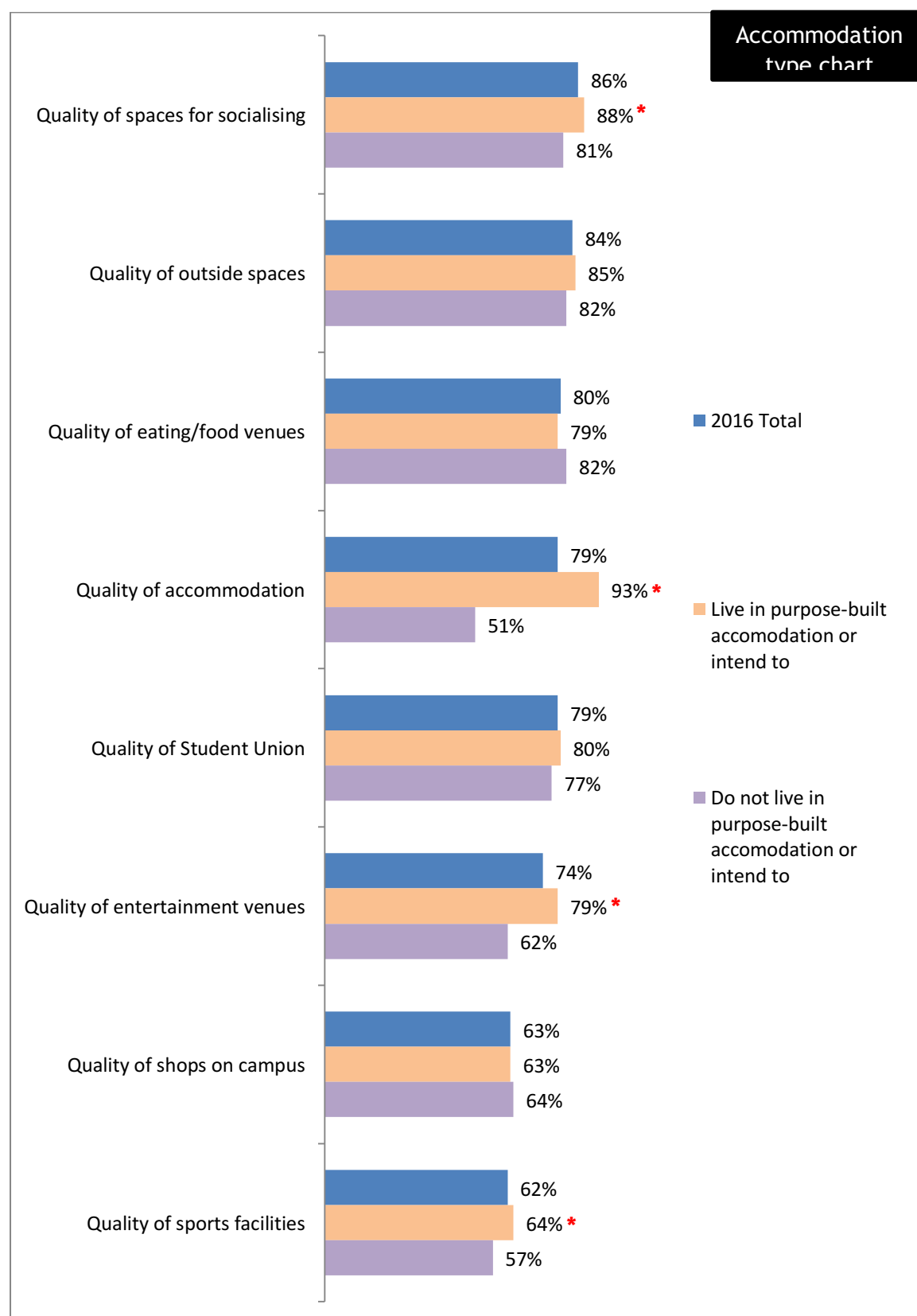
The other areas that are far more important to those who live in (or expect to live in) purpose-built student accommodation are sports facilities and entertainment venues, suggesting that they have come to expect everything on hand. No particular campus facility is significantly more important for those who don't live in (or expect to live in)

purpose-built student accommodation who live in (or expect to live in) purpose-built student accommodation.

QC5. Thinking about your non-academic experience, how important do you think the QUALITY OF THE CAMPUS FACILITIES will be? / QC5. Thinking about your non-academic experience, how important is the QUALITY OF THE CAMPUS FACILITIES? Chart shows very important/quite important. Base: 1108 participants (1105 in 2015, 1459 in 2014, 680 in 2013 and 1039 in 2012)



QC5. Thinking about your non-academic experience, how important do you think the QUALITY OF THE CAMPUS FACILITIES will be? / QC5. Thinking about your non-academic experience, how important is the QUALITY OF THE CAMPUS FACILITIES? Chart shows very important/quite important. Base: 756 who live or expect to live in purpose-built student accommodation and 352 who do not or do not expect to.



Implication:

Institutions should continue to add value for students and applicants by investing in the quality of campus accommodation. They should also recognise the importance of social spaces and outside space on campus.

The provision of residential accommodation on campus and the provision of common rooms in accommodation on campus contribute to the student experience

Around a third of those who live in (or expect to live in) purpose-built student accommodation feel that common rooms in campus accommodation are important to having a great time at university (33%, consistent with previous years). This places accommodation common rooms on a par with campus gyms (33%) and ahead of all but four of other 15 campus facilities tested.

Consistent with previous years, over a quarter of those who live in (or expect to live in) purpose-built student accommodation feel that having campus residential accommodation is important to contributing to the student experience (28%, especially non-Russell group universities 32%). This is 5 percentage points higher than the proportion who would consider any residential accommodation important (23%).

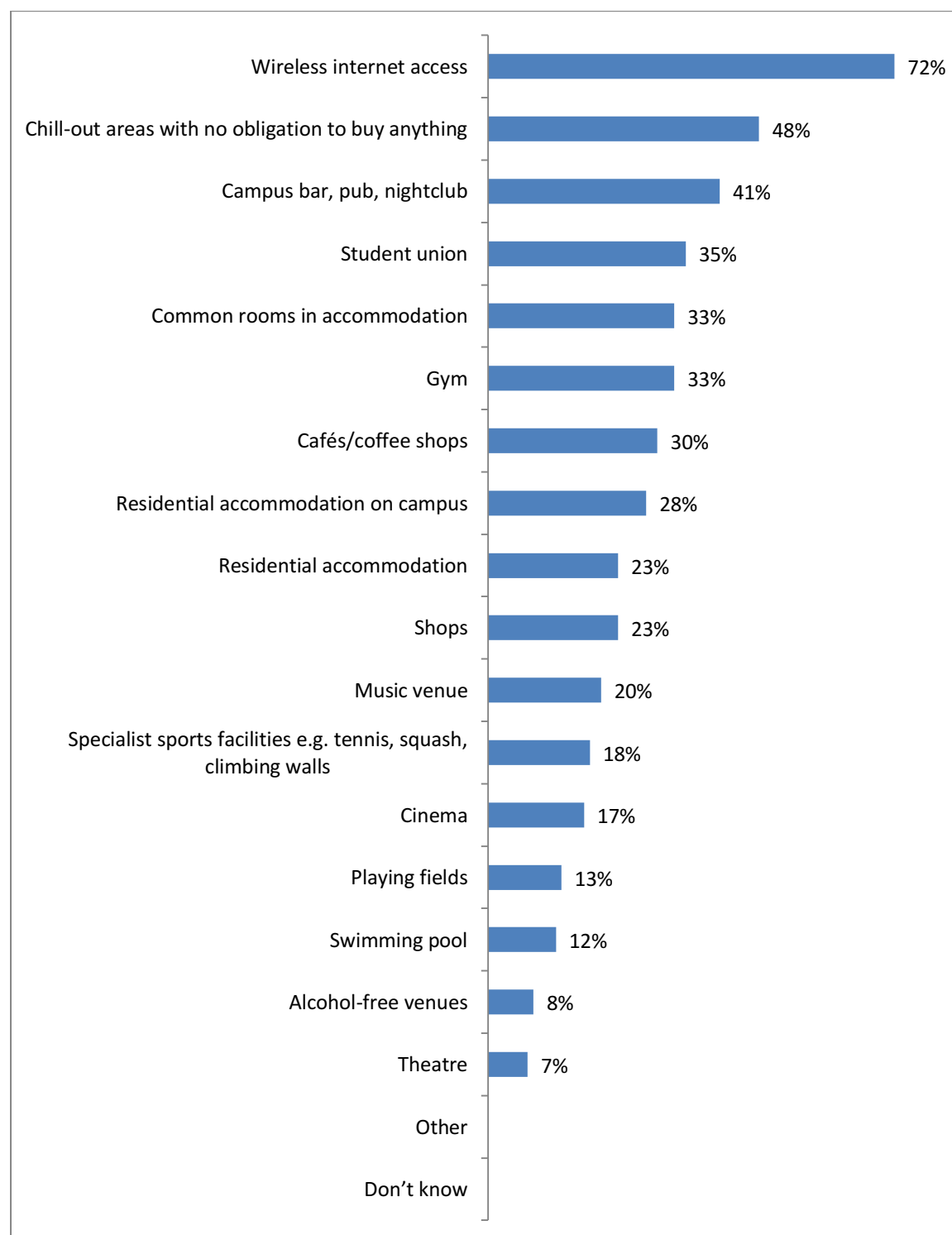
As in previous years, wireless internet access, chill out areas, campus bars/nightclubs and the student union are the top four most important facilities in terms of contributing to the student experience. The importance of campus bars and nightclubs is lower this year (41%, down 9 percentage points from last year and significantly lower than any previous year), which could reflect general trends in terms of the decline of the bar and nightclub industry among young people in the UK.

Implication:

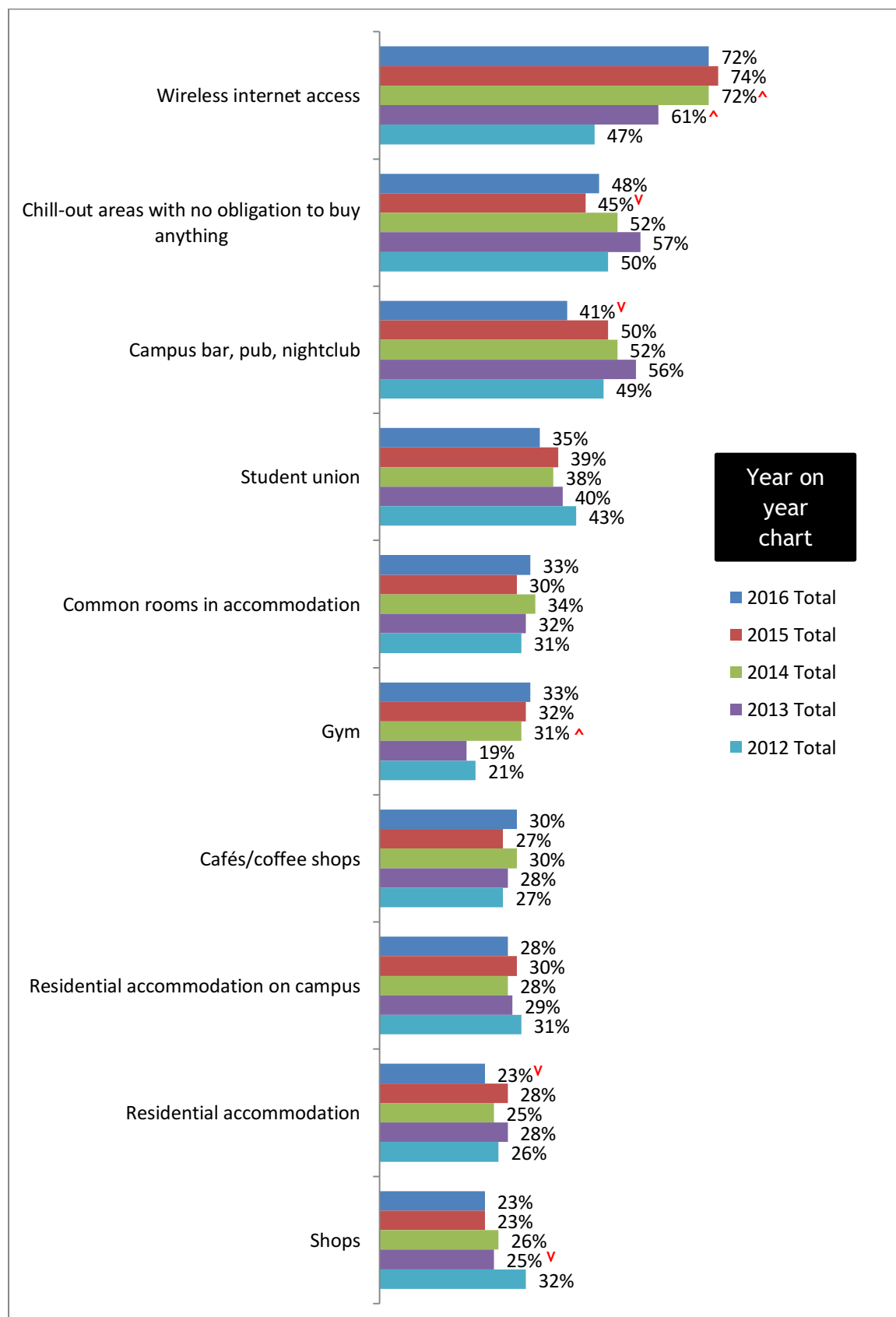
That a higher proportion of participants value common rooms in student accommodation than value the residential accommodation on campus itself emphasises the importance of the social value of purpose-built student accommodation in having a great time at university

Beyond accommodation, having a chill out space with no obligation to buy anything was important to just less than half of participants who expect to live in purpose-built student accommodation, perhaps showing concern over social spending.

QC7. Thinking about the KINDS OF FACILITIES available at university, which are most important to having a great time at university? Chart shows very/quite important. Base: 756 who live or expect to live in purpose-built student accommodation



QC7. Thinking about the KINDS OF FACILITIES available at university, which are most important to having a great time at university? Chart shows very/quite important for top ten answers only. Base: 756 who live or expect to live in purpose-built student accommodation (751 in 2015, 910 in 2014, 122 in 2013, 187 in 2012)



Satisfaction with accommodation on campus is positive but trending downward this year

Three quarters of those who live in or expect to live in purpose-built student accommodation say that they are very or quite satisfied with the quality of accommodation on campus (75%). This is somewhat lower than that seen last year and the year before (83% and 82%) but fairly in line with levels of satisfaction seen before then.

However, it should be noted that satisfaction with different non-academic facilities on campus is down across the board this year and this appears to be part of a general effect in dropping overall satisfaction rather than a drop in accommodation specifically. Without targeting specific universities, it is difficult to know the cause of this.

The drop in satisfaction for accommodation this year (among those living in or expecting to live in purpose-built accommodation) is largely based on a drop in ratings of very satisfied (31%, down six percentage points) after an increase in 2015.

In addition, the proportion of those living in or expecting to live in purpose-built accommodation that they are not very or not at all satisfied with accommodation on campus is significantly higher in 2016 (24%, up 10 percentage points since 2015). Both ratings of not very satisfied and not satisfied are significantly down this year.

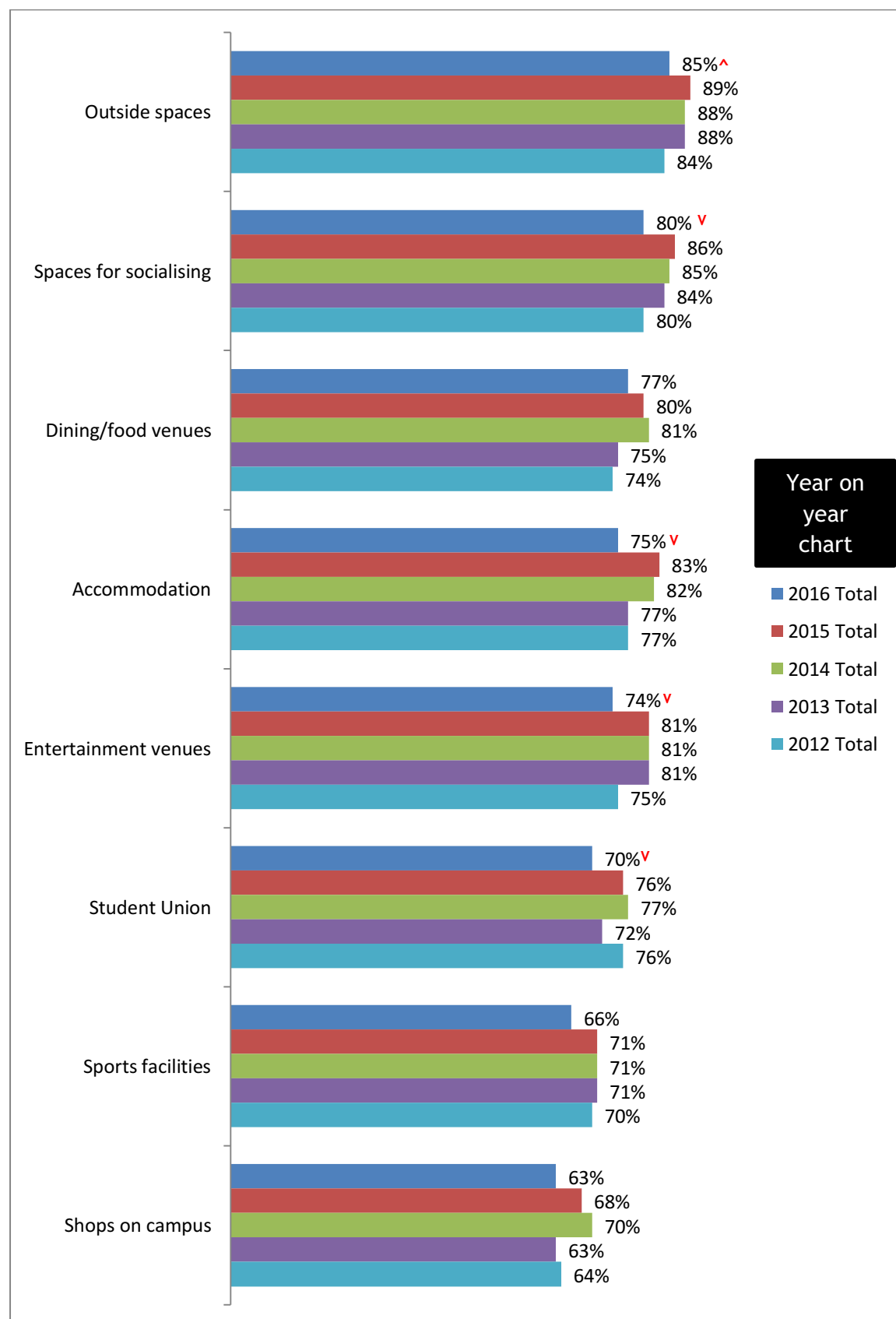
To offer a level of comparison, satisfaction for on-campus accommodation (among those living in or expecting to live in purpose-built accommodation) is lower than satisfaction among all participants for outside spaces (82%) and spaces for socialising (77%) but comparable or above all other non-academic campus facilities tested. Therefore, accommodation remains one of the non-academic campus facilities that students are fairly satisfied with despite the drop in satisfaction this year.

Implication:

Satisfaction with campus accommodation is somewhat down this year, showing the need for providers to maintain quality or improve perceptions among students.

UPP could consider investigating what may have caused lower satisfaction with accommodation this year (i.e. it could be a difference in the accommodation delivered or a difference in expectation).

QC6. How SATISFIED are you with your campus facilities? Chart shows very/quite satisfied. Base: 386 students who live in purpose-built student accommodation (379 in 2015, 513 in 2014, 122 in 2013, 187 in 2012)



Location and rent remain the most important aspects of purpose-built accommodation

As in previous years, location and affordable rent are the most important aspects of accommodation to those who say that they lived in purpose-built student accommodation or expect to. Seven in ten claim that location is important (72%) and the same number that affordable rent is important (70%). Both of these aspects are ahead of cleanliness and facilities.

While location is the most important factor, this includes different ideas of which location is preferred. Six in ten of those who say that they lived in purpose-built student accommodation or expect to say that it's important that the location is on or close to campus (64%) while far fewer say that it's important to be close to town (22%). Twice as many say that it is important that the location is close to campus (45%) than say that it needs to be actually on campus (24%).

There were no significant changes in level of importance of any aspect compared to last year and data is broadly consistent with previous years.

Of the remaining factors, en-suite facilities and cleanliness were considered next most important (52% and 51% respectively).

Of those who say that they lived in purpose-built student accommodation or expect to, applicants are more likely to feel that ensuite bathrooms are important than students are (57% vs. 48%). This difference was not present in last years' data but was observed in previous years.

As seen in previous years, there are also gender differences. Men are more likely to consider cleanliness important (56% vs. 47%) while women are more likely to consider security important (48% vs. 33%). Unlike last year, there are no significant differences in gender in terms of having space or being located close to town.

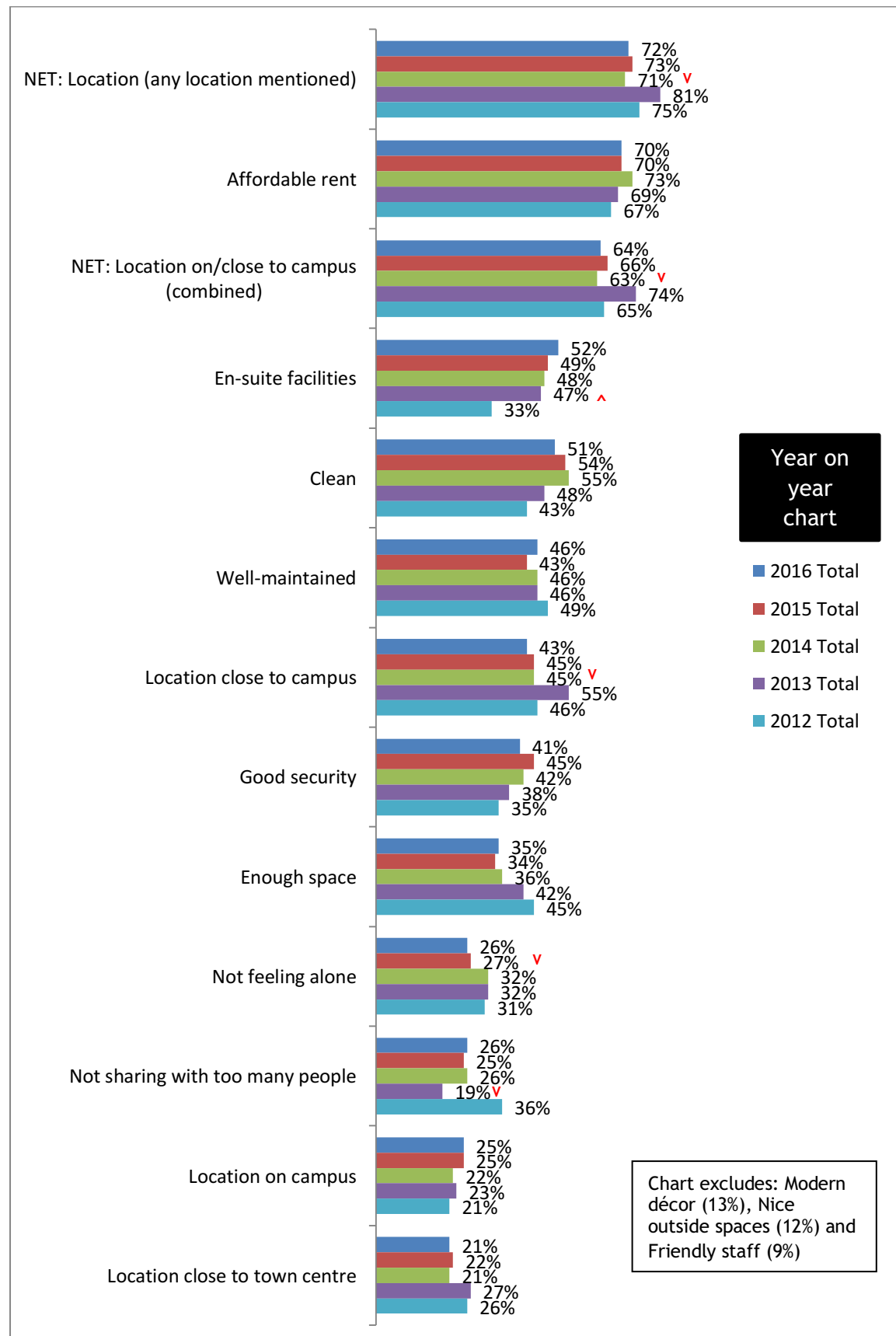
Implication:

Location and rent maintain their importance, though it is more important that accommodation is close to campus than actually being on campus.

Of the more specific accommodation features, en-suite bathrooms remain highly desirable and likely to drive choice.

As security remains a concern, especially among women, UPP could ensure that its security policy is fully explained in advance in order to ease any fears.

QD13 Thinking about student accommodation overall, what is most important to you? Chart shows all attributes mentioned as important by more than 20% of the sample. Base: 756 who live or expect to live in purpose-built student accommodation (751 in 2015, 910 in 2014, 122 in 2013, 187 in 2012)



Students are generally satisfied with the location of their purpose-built student accommodation but less so in terms of rent

As described previously, the most important elements of purpose-built student accommodation are location, price of rent, followed by ensuite facilities and cleanliness. Of these important factors, satisfaction with location and sharing of bathroom facilities is very high (87% and 82% very or quite satisfied), satisfaction with the price of rent and cleanliness is somewhat lower (54% and 67% respectively) among students that lived in these buildings during their first year.

The aspects of purpose-built accommodation that students are most satisfied by are location, security and the sharing of bathrooms while the price of rent was the aspect they were least satisfied by.

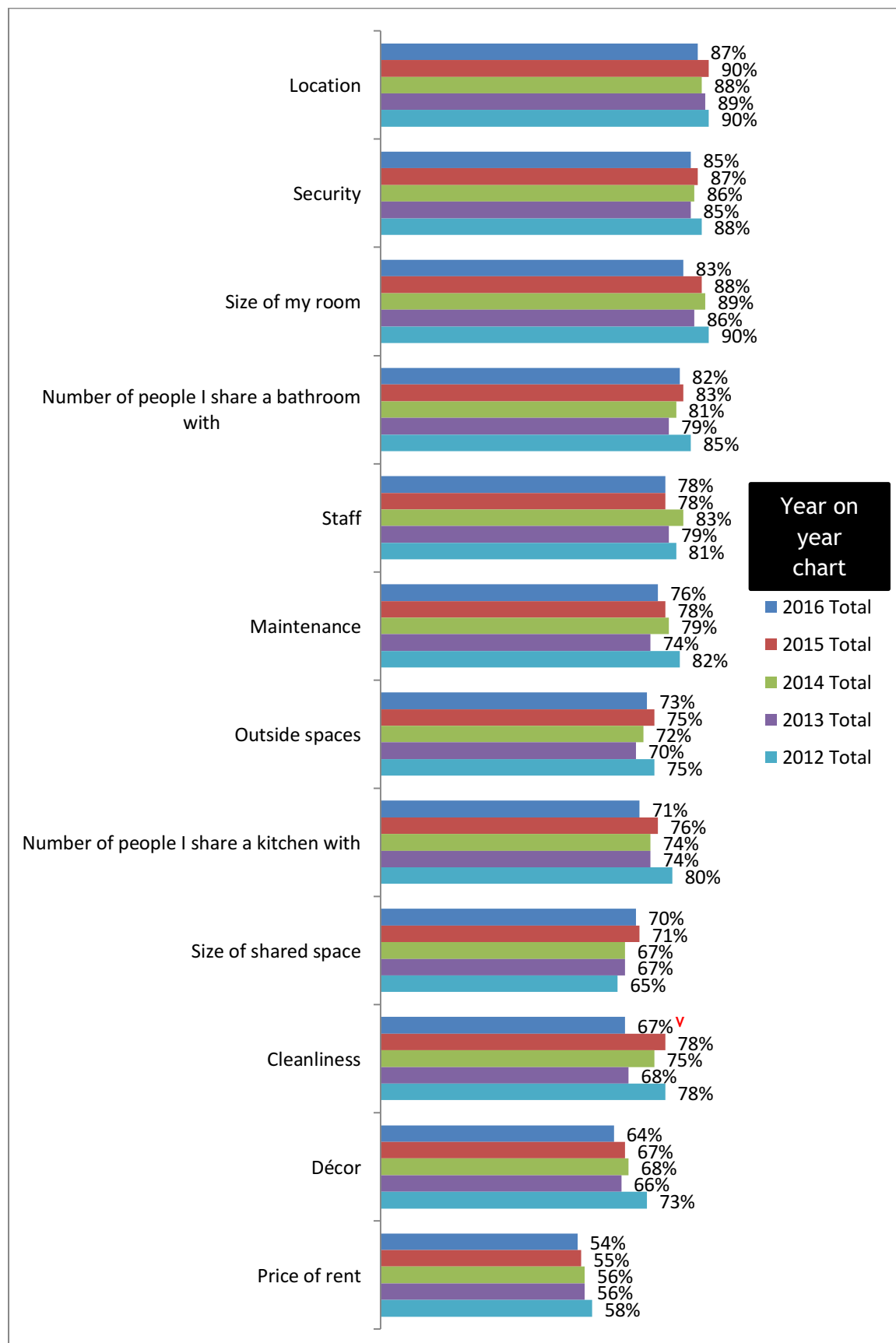
There were no significant differences in the levels of any particular aspect of purpose-built accommodation among students, except a decrease of satisfaction with cleanliness. This year, only 67% were very or quite satisfied with cleanliness, which is down 11 percentage points from the year before and lower than any previous year. The percentage of students who were not very or not at all satisfied was 32%, up 10 percentage points. Without the background details collected in this survey, it is difficult to comment upon why this is.

Implication:

Declining satisfaction with cleanliness emphasises the importance of cleaning services and upkeep, considering that this was rated as one of the more important elements of purpose-built student accommodation (especially amongst men).

Consider communicating to students about the importance of cleanliness and the steps that UPP put in place to ensure all properties are up to scratch.

QD14. How satisfied are you with your accommodation? Chart shows very/quite important for top ten answers only. Base: 386 students who live in purpose-built student accommodation (379 in 2015, 513 in 2014, 122 in 2013, 187 in 2012)



Importance of factors in university choice

Summary

- Course, reputation and location remain the most important factors in choosing between universities
- Employability is the fourth most important characteristic and (at least in terms of stated importance) shows no growth in importance from last year
- When examining more specific attributes of university choice, those with the highest importance (beyond academic provision) are accommodation (among those who use it or are likely to), career support and student support in general
- Attributes that are less important than average include transport links, clubs and societies and an attractive campus, among others
- At this early stage, students are very open to the idea that the TEF would influence their university choice in the future

Implications

- While the current focus is on institutions offering value for money, prior to the launch of the TEF, the majority did not cite employability as a factor in their choice of university
- Of the more specific offerings included in the MaxDiff analysis, accommodation was considered more important in university choice (by those who use it or expect to) than student support services.
- High importance attributed to careers support and the possibility of work placement may indicate the beginning of an employability focus in 2016 students and applicants (MaxDiff analysis), though no increase in the importance of employability is seen in the trended data from direct questioning.
- That access to shops and good transport links are considered of below average importance suggests that these are relatively unimportant elements when students consider the importance of the university's location (i.e. closeness or distance to home and perceptions of the living experience in that area are likely to be more important locational factors).
- Currently, university choice is based heavily on course, location and reputation. That so many participants indicated that it could impact on their university choice means that this could lead to big changes in how decisions are made in the future.

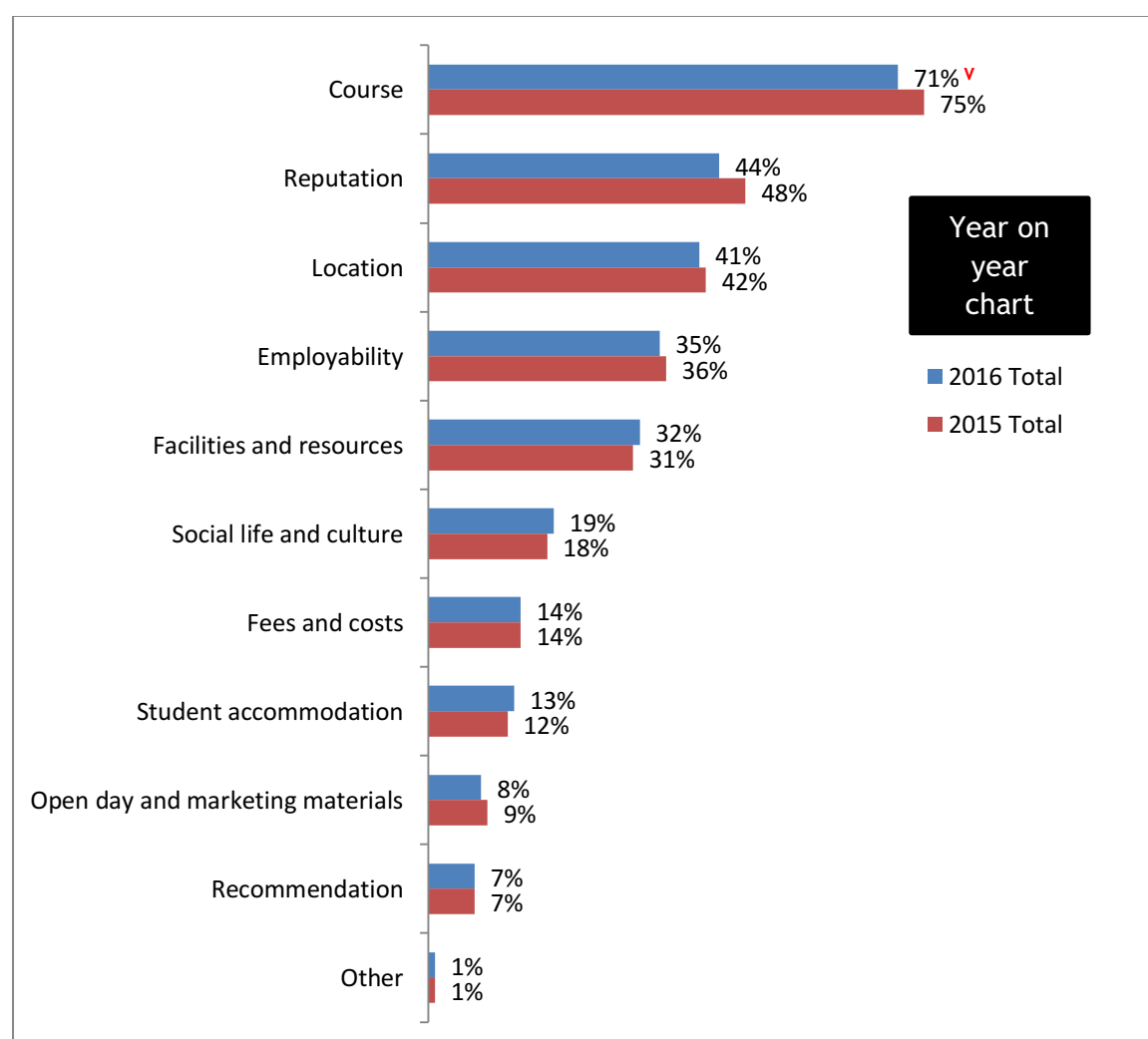
Course, reputation and location remain the most important factors in choosing between universities. Employability is the fourth most important characteristic and (at least in terms of stated importance) shows no growth in importance from last year

Deciding which university to apply to is based on a number of factors, led by course, reputation and location (the top three considerations as they were in 2015).

The course remains the most important factor, even though the number who mentioned this as most important is down this year compared to last (71%, down 4 percentage points). There are no other significant differences since 2015, when the question was added to the survey.

Student accommodation is only important to around one in ten participants (13%), rising to almost one in five among those who live in purpose-built accommodation or plan to (18%).

QPU4. Which of these factors were most important in your decision about which university to apply to?
Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015)



Employability is the fourth most cited factor in the decision, considered by over a third of participants (35%, no significant differences in importance between students and applicants) and considered more frequently than facilities, social life and culture and costs.

Students are most likely to say that the course was important in their decision of university (74% vs. 68%) while applicants are more likely to say that facilities and resources are important (36% vs. 29%). Males say that they are more influenced by location (45% vs. 36%), which is their second most important factor.

Meanwhile reputation is significantly more important to students and applicants of Russell group universities (65% vs. 34%). Conversely, location, facilities and resources, fees and costs and student accommodation are all more important to students and applicants of other universities.

Implication:

While the current focus is on institutions offering value for money, prior to the launch of the TEF, the majority did not cite employability as a factor in their choice of university

MaxDiff Analysis - More specific attributes influencing university choice

This year, a MaxDiff analysis exercise has also been included to examine the different weighting of factors that go into the choice between different universities in more depth. This is a statistical analysis technique where the participant makes a series of trade-off choices.

For a fuller explanation of the MaxDiff methodology, please see the appendix.

MaxDiff results are aggregated to provide a relative importance score (an Index Score) for each attribute. This is based on the number of times an attribute is chosen as the most and the least important (when presented with lists of four different options, a number of times). The index scores derived for each attribute are standardised around a score of 100, which represents average importance. **A score over 100 represents a higher than average importance** (and the higher the score, the more relatively important) and **a score under 100 indicates a lower than average importance** (the lower the score, the lower the relative importance).

The participants were instructed: *In each group of four facilities please choose the most and least important to you when choosing a university.*

The following items were shown in blocks of four combinations according to a pre-defined rotation schedule:

- A good nightlife for students
- Guaranteed accommodations
- Friendly feel to the university
- Attractive campus
- Good transport links on campus
- Good quality accommodation
- Good student union
- Good learning resources (e.g. computers and libraries)
- Ability to take part in sports
- Access to high street shops and cafes on campus
- Able to take part in music (gigs, performance, orchestras, bands, choirs)
- Advice and support to prepare for future career
- Work placement/internship opportunities
- Modern sport facilities
- A good range of clubs and societies
- Visible campus security
- Excellent student support
- Part time work opportunities

As can be noted from the university attributes tested, these focus on more specific attributes than in the previous section. The generalities of course and reputation are not included and location is included only in terms of nearby amenities rather than location in general.

Beyond academics, are accommodation (among those who use it or are likely to) has the highest importance in university choice followed by career support and student support in general - MaxDiff Results

Among these more specific attributes, good learning resources were by far the most important attribute in university choice. As this is the closest proxy for the quality of education offered and the quality of the course, this probably speaks of the wider academic experience rather than reflecting only on the provision of computers and libraries themselves.

Among those who live in purpose-built student accommodation or expect to, good quality accommodation is the next most important attribute. This is much higher for the overall 2016 sample (i.e. all students and applicants). Comparing the relative importance for accommodation provisions among those who actually use them (or plan to) is more meaningful and this should be considered a highly rated attribute in terms of importance.

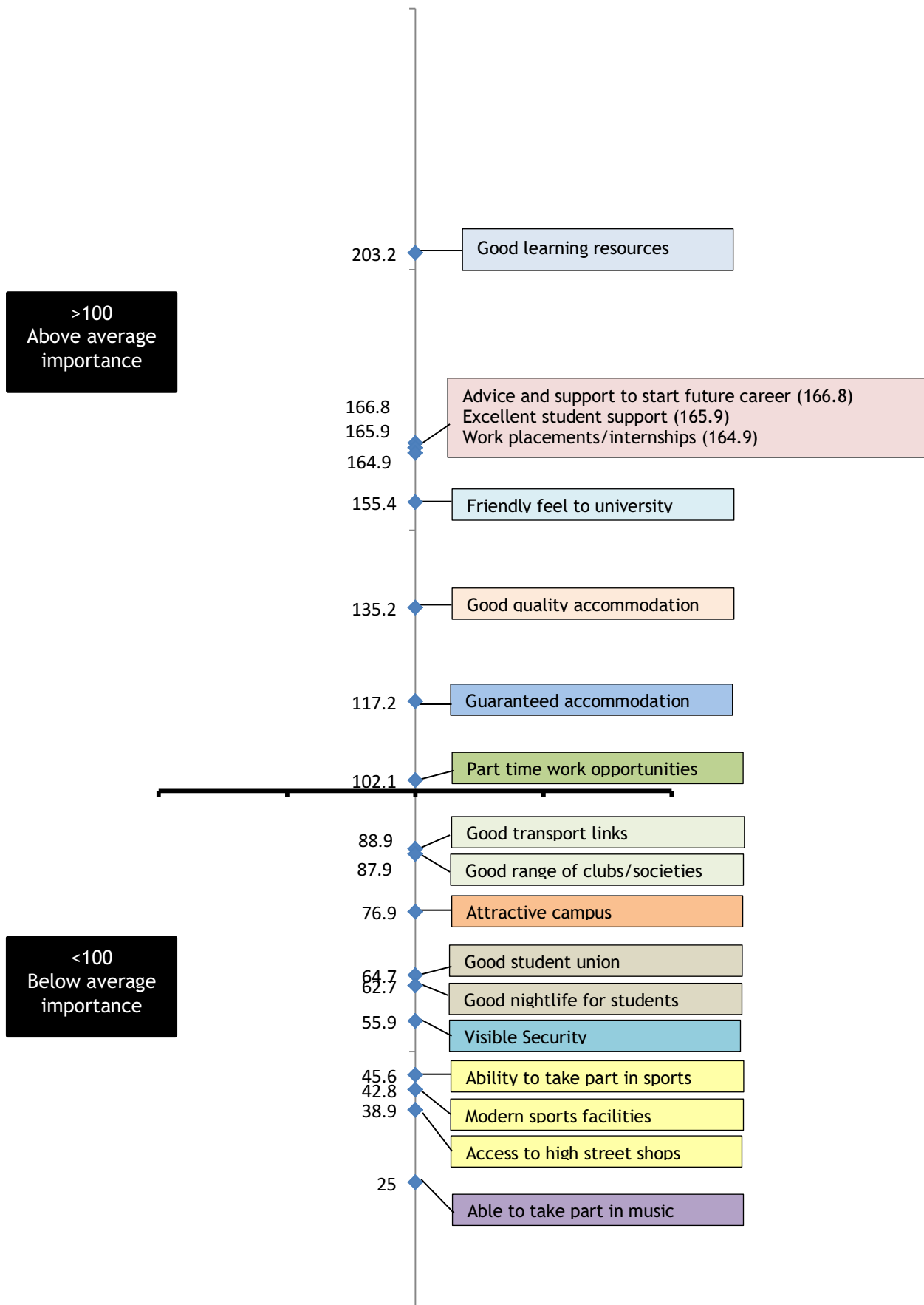
In the next tier of importance, university attributes that emphasise employability feature heavily (Advice and support to prepare for future career and work placement/internship opportunities). These, along with student support, a friendly feel to campus and that accommodation is guaranteed (when considered by those who live in purpose-built student accommodation or expect to) rate above other factors. Those who live in purpose-built student accommodation or expect to value quality of accommodation and guaranteed accommodation much higher than those who do not. In fact, for them, both of these attributes rank above employability factors (work placements/internship opportunities and advice and support to prepare for a future career) and are roughly three times as important as for those who do not live or expect to live in purpose-built accommodation. A good nightlife, good transport links, ability to take part in sports, and modern sports facilities are also all more important to this population but are still all of lower than average importance.

Conversely, those who do not live in purpose-built student accommodation or expect to place a much higher importance on employability factors, transport links, student support and part time work opportunities. This paints the picture that this population may live further afield and require transport links and may be more likely to need to work to finance their study.

Applicants attribute a somewhat higher importance to support factors including advice and support to prepare for a future career, excellent student support and a good student union. They also attribute higher importance to part time work opportunities (making this attribute of above average importance for applicants only), which makes sense in the context of previous research conducted by YouthSight which suggests that applicants expect to work part time at university to a much greater extent than students actually do.

Conversely, students attribute higher importance to clubs and societies, an attractive campus and access to shops, though these all remain below average importance to students.

Max Diff Importance Scores



Above Average Importance

	2016 Total	Applicant	Student	Live in or expect to live in purpose-built accommodation	Don't or do not expect to live in purpose-built accommodation
Good learning resources (e.g. computers and libraries)	203.2	203.8	202.6	192	226.9
Advice and support to prepare for future career	166.8	173.4	160.3	148.6	205.5
Excellent student support	165.9	174	157.8	151.2	197.1
Work placement/internship opportunities	164.9	168.8	161	149.2	198
Friendly feel to the university	155.4	154.3	156.4	153.7	158.9
Good quality accommodation	135.2	131.3	139.1	168.9	63.6
Guaranteed accommodations	117.2	113.1	121.3	150.4	46.7
Part time work opportunities	102.1	110.4	93.9	88.1	131.9

Implication:

Of the more specific offerings included in the MaxDiff analysis, accommodations was considered more important in university choice (by those who use it or expect to) than student support services. High importance attributed to careers support and the possibility of work placement may indicate more of an employability focus in 2016 students and applicants.

Below Average Importance

	2016 Total	Applicant	Student	Live in or expect to live in purpose-built accommodation	Don't or do not expect to live in purpose-built accommodation
Good transport links on campus	88.9	90.5	87.4	78.9	110.3
A good range of clubs and societies	87.9	79.5	96.2	96.7	69.2
Attractive campus	76.9	69.3	84.4	81.1	68.1
Good student union	64.7	69.9	59.6	61.3	72.1
A good nightlife for students	62.7	58.5	66.7	75	36.5
Visible campus security	55.9	58.4	53.5	51.1	66.3
Ability to take part in sports	45.6	44.4	46.7	50.3	35.6
Modern sport facilities	42.8	42.3	43.4	45.1	37.9
Access to high street shops and cafes on campus	38.9	33.4	44.3	33.2	51
Able to take part in music (gigs, performance, orchestras, bands, choirs)	25	24.7	25.4	25.4	24.3

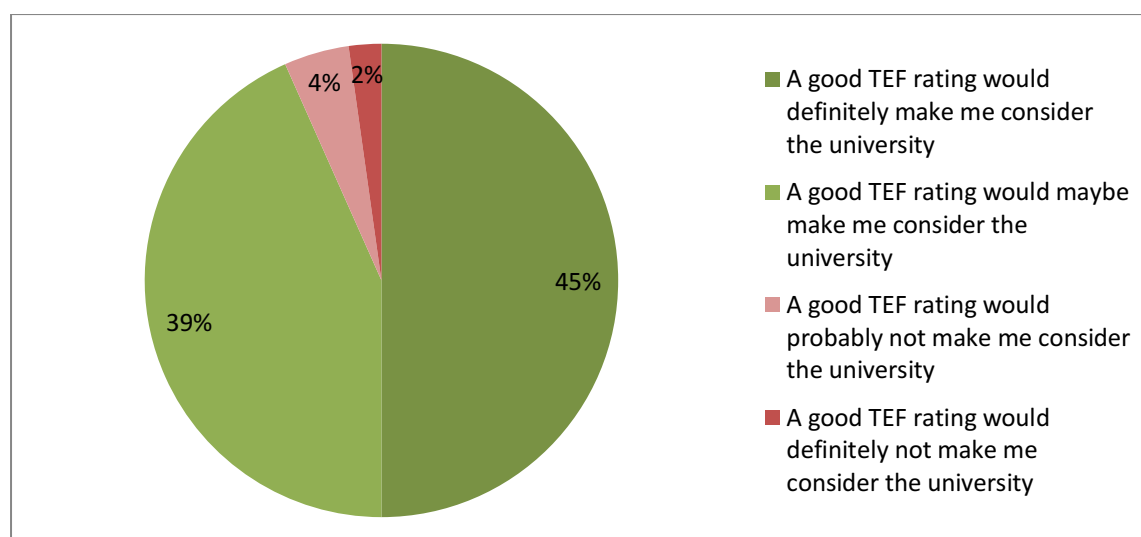
Implication:

That access to shops and good transport links are considered of below average importance suggests that these are relatively unimportant elements when students consider the importance of the university's location (i.e. closeness or distance to home and perceptions of the living experience in that area are likely to be more important locational factors).

At this early stage, students are very open to the idea that the TEF would influence their university choice in the future

A factor that is not yet present in the matrix of factors influencing university choice but will likely play a part in the future is the introduction of the Teaching Excellence Framework (TEF). Almost half of applicants (after being informed briefly about what the TEF is⁵ but without any reference to a potential link to tuition fee levels) say that a good TEF rating would definitely make them consider the university (45%). When considering those who would definitely or would maybe the university as a result, the proportion is 84%. Only 2% said that it would definitely not influence their decision.

QR1. Given our short explanation of TEF, to what extent would a good TEF rating influence your university choice? Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015)



There seems to be a gender divide on how appealing using the TEF would be. Women are more likely to say that a good score would definitely make them consider the university (50% vs. 45%) while men are more likely to say that it would probably not (7% vs. 2%). This is a new question for 2016 and no trending data is available.

Implication:

Currently, university choice is based heavily on course, location and reputation. The fact that so many participants indicated that the TEF would influence their university choice could lead to big changes in how decisions are made in the future.

Please note: the short explanation of the TEF given did not mention that the framework could be linked to the tuition fee levels that an institution could charge.

⁵ The government plans to introduce the Teaching Excellence Framework (TEF). You may not have heard about it before however it outlines the criteria that the government use to measure good quality teaching at university. The TEF rating of a university will be makeup of a number of different measures, from student satisfaction, the progress of students from disadvantaged backgrounds as well as other existing data.

Considering apprenticeships as an alternative to university

Summary

- More than six in ten participants claim that they considered alternatives to university
- Around a fifth of university applicants also considered applying for an It is unclear how many applicants seriously considered apprenticeships as an alternative to university. As seen by the difference between applicants and students, it is easy to over-emphasise the level of consideration
- apprenticeship
- The reasons for applying to university instead of apprenticeships are varied but salary and career qualifications are an important factor among them.
- Gaining a degree qualification as well as working under an apprenticeship scheme would make apprenticeships more appealing to the majority

Implications

- While experiential aspects are as much of a pull for degrees as employment prospects, the lower employment prospects and salaries associated with apprenticeships remain a barrier.
 - This could be taken as positive news for the government's degree apprenticeships / higher apprenticeships as well as similar schemes from the private sector, validating the need for a program that combines real work experience and a qualification.

Please note that our sample was comprised of those who eventually chose to apply to university. The decision making and consideration of alternatives between those who considered university among other options and chose not to apply to university is beyond the scope of this research.

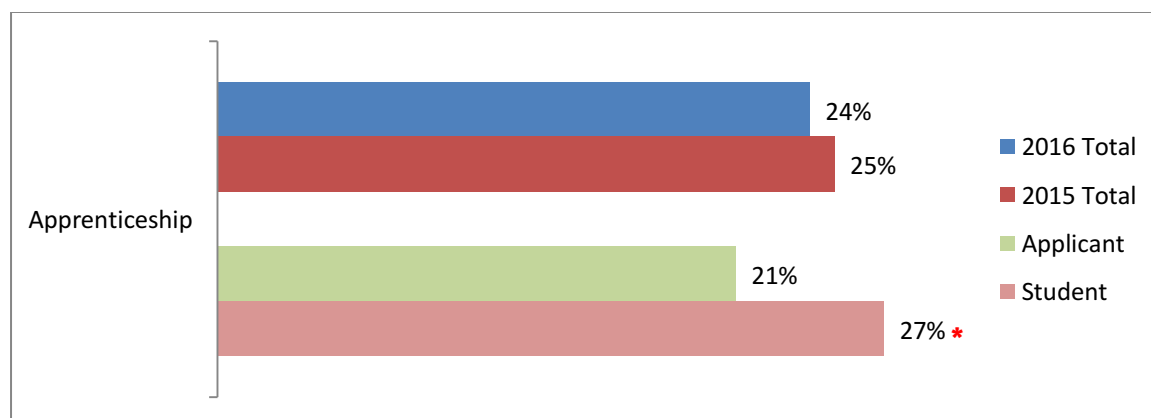
Around a fifth of university applicants also considered applying for an apprenticeship

Around a quarter of all participants state that they considered apprenticeships before applying to university (24%), showing no significant change since the previous year. Apprenticeships are the second most popular alternative to university considered after paid work, though there is no evidence of any impact from increased political and media attention over the last year.

As before, students are more likely to say that they considered apprenticeships than applicants are (27% vs. 21%). Given that we spoke to applicants close to the 30th June UCAS application deadline, this most likely suggests a difference in outlook between students and applicants (i.e. students over-emphasise the extent to which they considered apprenticeships, fewer actually considered apprenticeships as applicants).

QPU1. Which of these did you consider before applying to university? Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015)

Year on year and Student vs. Applicant chart



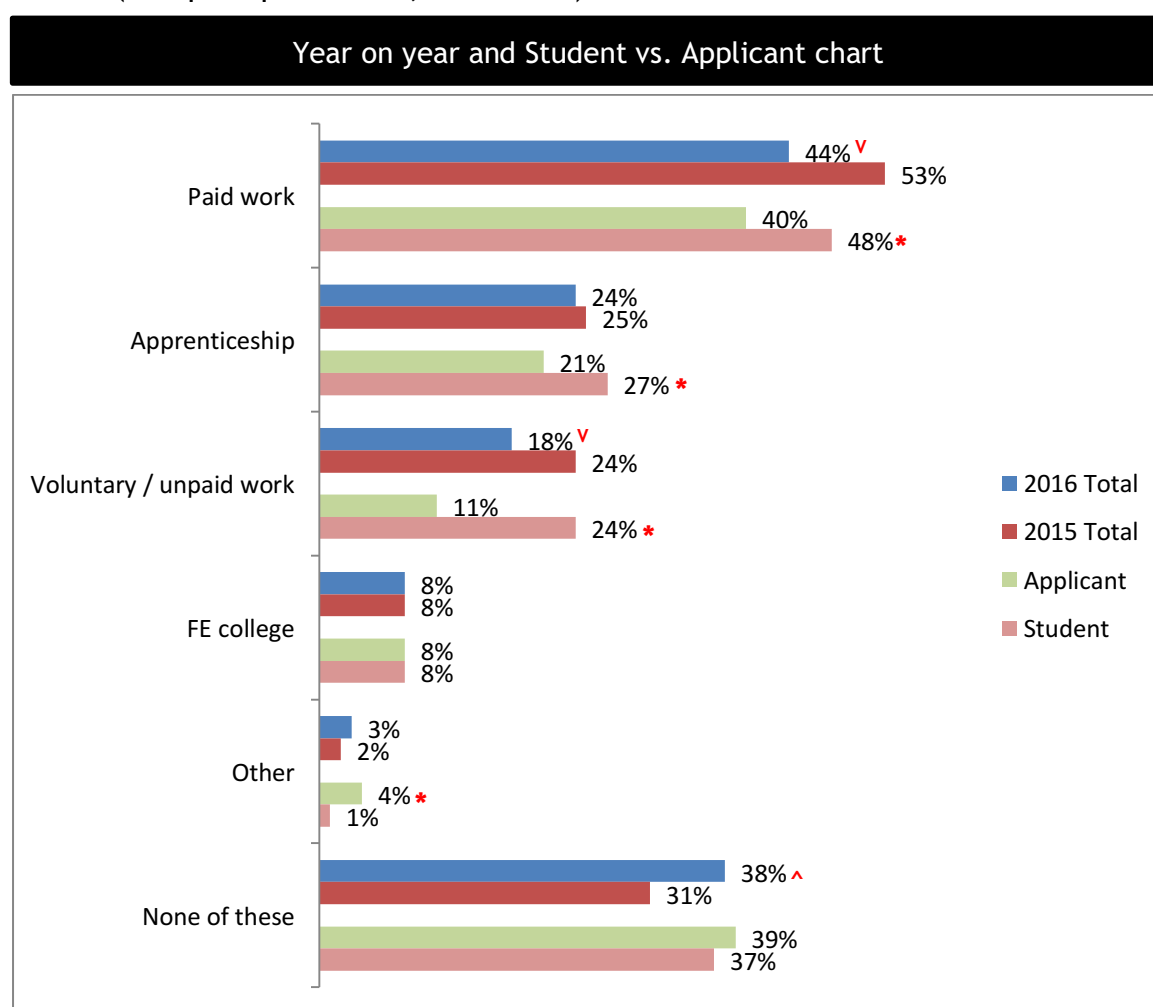
Implication:

It is unclear how many applicants seriously considered apprenticeships as an alternative to university. As seen by the difference between applicants and students, it is easy to over-emphasise the level of consideration when already at university.

More than six in ten participants claim that they considered any alternatives to university

While for some, university is the only option, the majority still describe their choice to go to university as between several options. Around six in ten participants (62%) say that they considered any alternatives to university, fewer than did so last year (69%). Though there was no significant difference between students and applicants, the proportion considering alternatives was higher outside of Russell Group universities (68% compared to 51% at or applying to Russell Group universities) and among men (66% vs. 59% among women).

QPU1. Which of these did you consider before applying to university? Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015)



Entering paid work is the most frequently considered alternative to attending university, considered by less than half of participants (44%). This is significantly lower than in 2015 where 53% stated that they had considered paid work.

As with apprenticeships, students are much more likely to state that they considered paid work as an alternative compared to applicants (48% vs. 40%), just as they are regarding voluntary/unpaid work (24% vs. 11%). While there is no significant difference in the proportion of students who stated they considered alternatives compared to applicants, they are more likely to characterise their choice between wider selections of alternatives than applicants do.

Males are more likely to say that they considered paid work (47% vs. 41%) and females are more likely to say that they considered attending further education colleges (10% vs. 6%).

Implication:

Students seem to consistently overestimate the extent to which they considered university alternatives. It is likely that they want to consider themselves to have made an informed choice in hindsight

The extent to which these alternatives were considered cannot be fully answered by this report and so we urge caution in interpreting these figures.

The reasons for applying to university instead of apprenticeships are varied but salary and career qualifications are an important factor among them.

Likewise gaining a degree qualification as well as working under an apprenticeship scheme would make apprenticeships more appealing to the majority

In terms of the reasons why students and applicants make the decision to apply to university rather than to apply for an apprenticeship, there is no one clear-cut reason. That they are interested in the academic subject that they apply to study, want the university experience and that university offers better long-term salary prospects are the most commonly cited of several reasons (cited by 58%, 55% and 54% of participants respectively).

Though the education community is increasingly focused on the rising importance of a return on investment in graduate salary prospects, this is still very much only part of the picture for students and applicants themselves and indeed has trended down 6 percentage points since last year. Participants also continue to value the experiential aspects of studying.

However, two fifths of participants feel that an apprenticeship does not get them the qualification required for their chosen career (42%, unchanged from 2015). While experiential aspects are as much of a pull for degrees as employment prospects are, the lower employment prospects and salaries associated with apprenticeships remain a barrier.

This could be taken as positive news for the government's degree apprenticeships / higher apprenticeships, validating the need for a program that combines real work experience and a qualification. Indeed, gaining a degree qualification alongside an apprenticeship is the most commonly selected reason that participants said would make an apprenticeship more appealing (69%).

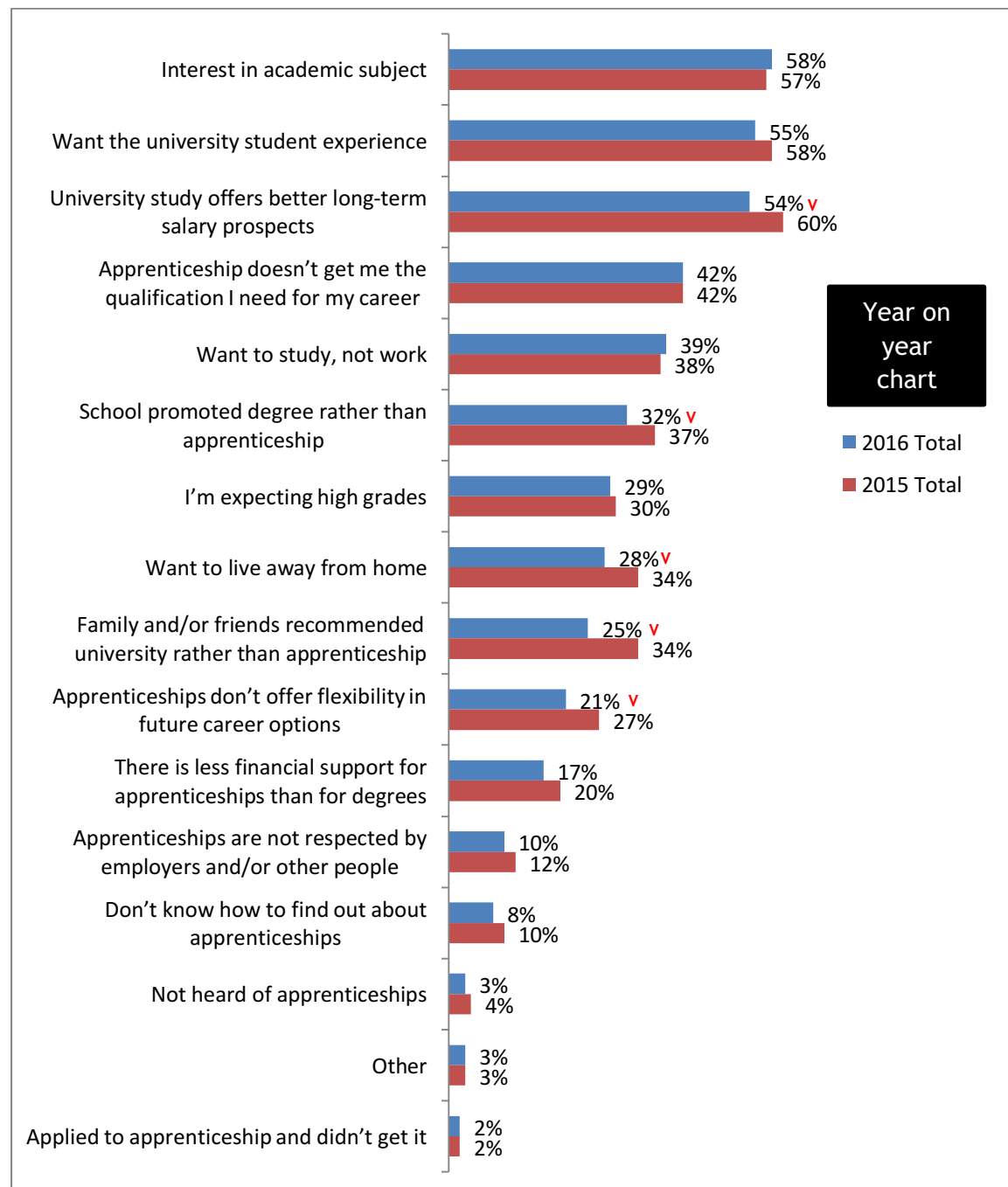
Beyond actually offering a degree, overcoming the employment prospects/salary barrier is the key concern for attracting more university applicants to apprenticeships. Over half of participants cite a guaranteed future job (58%) and better long term salary potential (also 58%) as things that would make apprenticeships more appealing.

There is likely a split among participants between those who would prefer to have the chance to gain work experience as part of their degree and those who would not (39% stated that they chose to study at university because they wanted to study, not work). Greater variety and choice in higher education in the future would most benefit each of these different student/applicant groups.

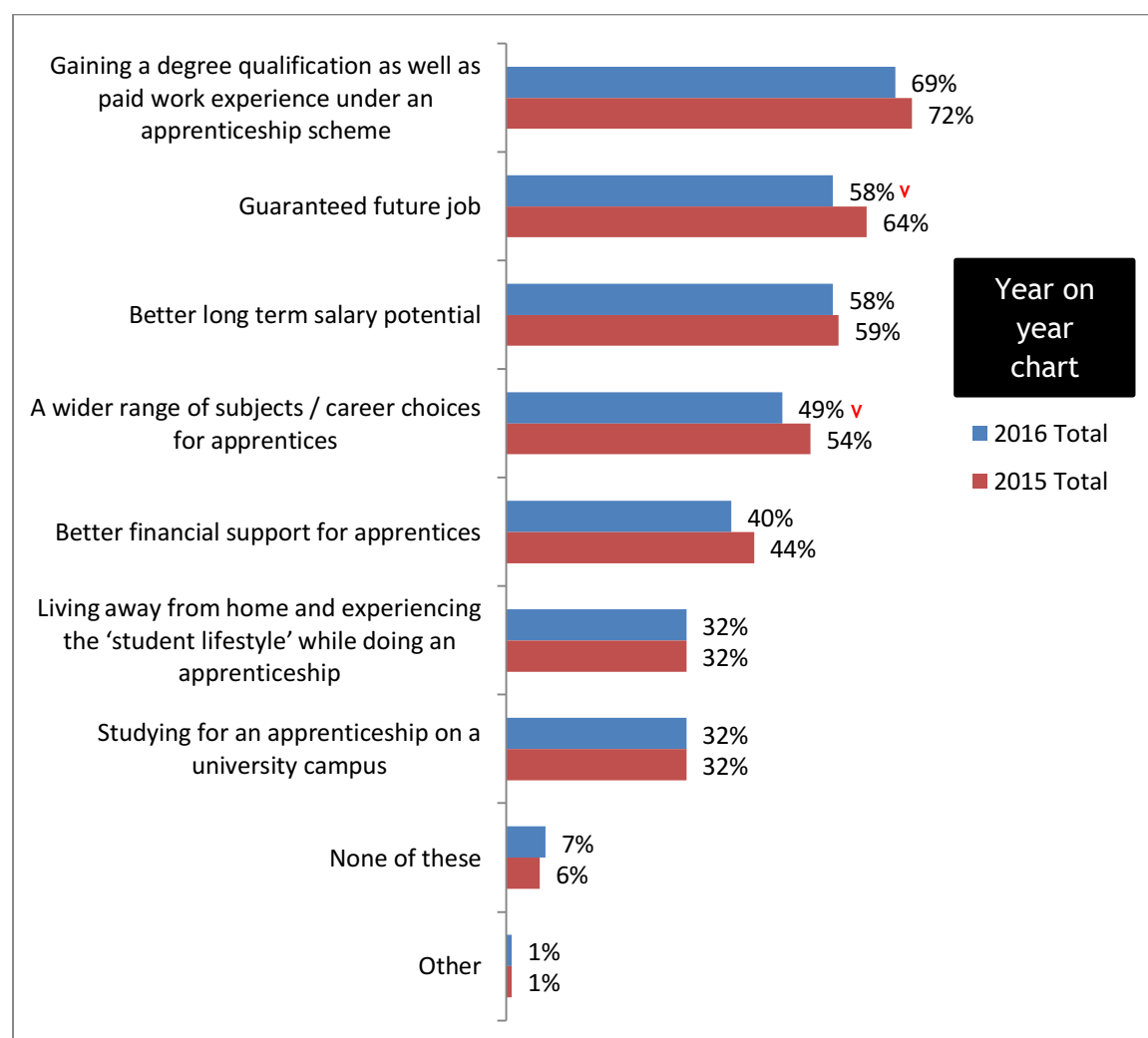
Indeed, qualitative research conducted in 2015 suggested that some students would worry about the prospect of focusing on their study and work requirements at the same time and being able to perform well with both and afford both enough time. Such mixed vocational/academic programs must take this into account in their design, allowing students time to meet both goals and (ideally) feel that they experienced 'the university experience' as well.

Most encouragingly, only 7% of participants say that there was nothing that could make an apprenticeship more appealing to them. This indicates that a very large number of students and applicants are open minded and can appreciate the benefits of vocational training.

QPU2. Which, if any, are your reasons for choosing to apply to university rather than an apprenticeship? / Which, if any, are your reasons for not considering an apprenticeship? (1108 participants in total, 1105 in 2015)



QPU3. Which of these, if any, would make an apprenticeship more appealing to you? (1108 participants in total, 1105 in 2015)



Implication:

While experiential aspects are as much of a pull for degrees as employment prospects, the lower employment prospects and salaries associated with apprenticeships remain a barrier.

This could be taken as positive news for the government's degree apprenticeships / higher apprenticeships as well as similar schemes from the private sector, validating the need for a program that combines real work experience and a qualification.

Employability

Summary

- Many students and applicants feel that there is more that universities can do in order to improve employability (around six in ten).
- Many also feel that employers could improve their role in improving students' employability (around four in ten)
- Over half of students do not feel that employers do not offer enough work placements/internships for university students
- Around three quarters of students and applicants feel that they are doing enough to improve their own employability
- As in previous years, around seven in ten students would pay more for their degree if employability was assured, though this is trending downward year-on-year

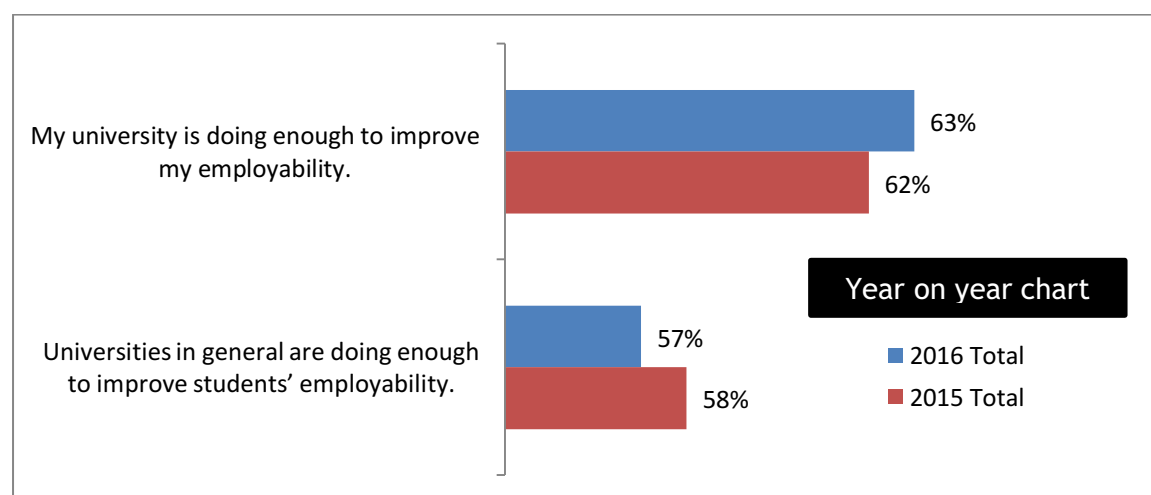
Implications

- Institutions can consider strengthening their offering with regards to improving the employability of students as this appears that it will be well received, if sufficiently communicated
- Students and applicants have an open mind to a greater role being played by employers in enhancing their employability. Institutions could consider partnerships and collaborations with employers that could help them to share the burden of enhancing the employability of their students and thus enhancing their reputation
- Considering that they rate themselves so well in enhancing their own employability but would prefer employers to reach proactively out to the, students and applicants appear somewhat naïve concerning employability. It could be that student support services need to emphasise what students can do for themselves
- That so many students would pay more for their degree in return for demonstrated employability shows the growing importance of employability in university choice. However, that the number who would do so is trending downward shows that this is also likely limited by perceptions of growing financial pressure on students

Many students and applicants feel that there is more that universities can do in order to improve employability

Just less than three fifths of participants agree that universities are doing enough to improve their students' employability (57%, consistent with 2015) with 12% actively disagreeing that universities are doing enough.

QM7. Please tell us how much you agree or disagree with the following statements. Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015)



University applicants are more likely to express a positive opinion on the efforts of universities than students: 67% of applicants feel that universities are doing enough compared to 47% of students. Students are also more likely to disagree that universities are doing enough (18%). While this could indicate that the expectations that applicants have are felt to be unmet once students start university, students have a much higher impression of their own university than others in general. Over three fifths of students feel that *their* university is doing enough (63%). As such, it may not be that students are more critical of universities' efforts to improve employability than applicants are but may simply be expressing concern over the challenge of employability.

Implication:

Institutions should consider strengthening their careers service offering and improving the employability of students as it appears that this will be well received if sufficiently communicated.

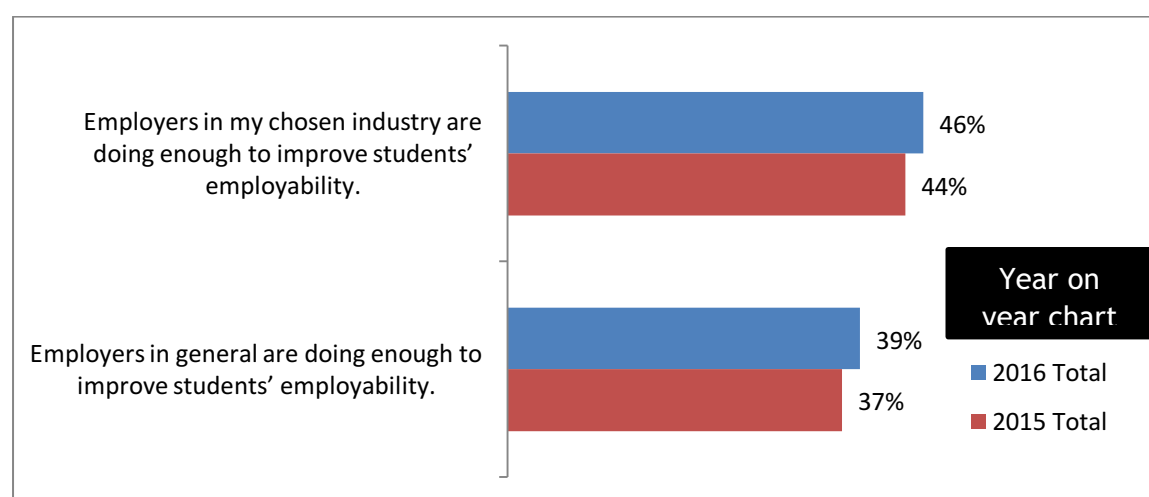
Applicants have high expectations of universities improving their employability and institutions should work hard to avoid disappointing them.

Many also feel that employers could improve their role in improving students' employability and indeed would prefer employers that reach out to them proactively

Over half of students do not feel that employers do not offer enough work placements/internships for university students

Participants also feel that employers could do more to help students to improve their employability. Only 39% of participants felt that employers are doing enough, though this rises to 46% when considering employers in their own chosen field (consistent with 2015).

QM7. Please tell us how much you agree or disagree with the following statements. Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015)



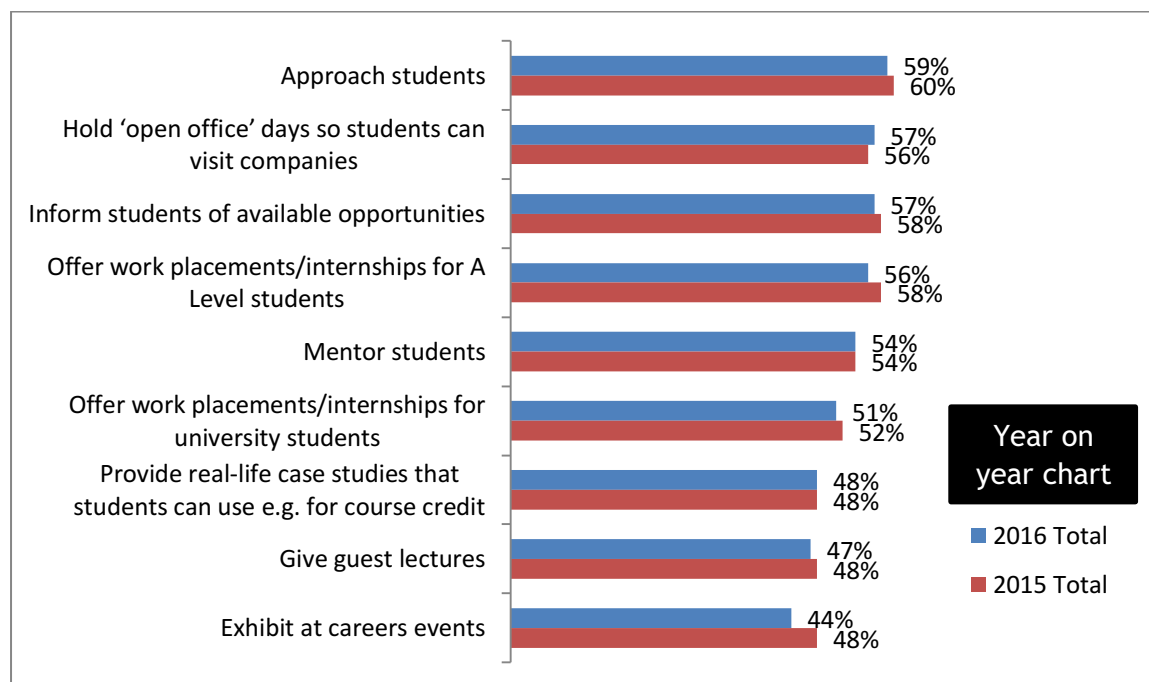
That perceptions of the efforts of employers in their own chosen field is higher may be an element of bias (i.e. justifying one's own choice in selecting that field) or may simply be dragged higher by those applying to or studying fields that genuinely do offer greater employability once the participant focuses on their own circumstances rather than their thoughts on higher education in general.

Applicants are more positive about the efforts of employers both in general (42% feel that they do enough vs. 35% among students) and specifically in their chosen field (49% vs. 43%). This is in line with their lower opinions on the efforts of universities in general to improve employability, suggesting that they have lower expectations overall for outside help.

Participants also think employers in their chosen fields could do more when they discuss the specific things they are doing to enhance students' employability. Of the nine actions employers could take that were tested in the survey, all of them were mainly felt to be things they could do more rather than things that they already do enough of.

Where employers could do more

QM8. For each of these statements, which best describes what businesses in your chosen industry are doing to improve your employability? Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015)

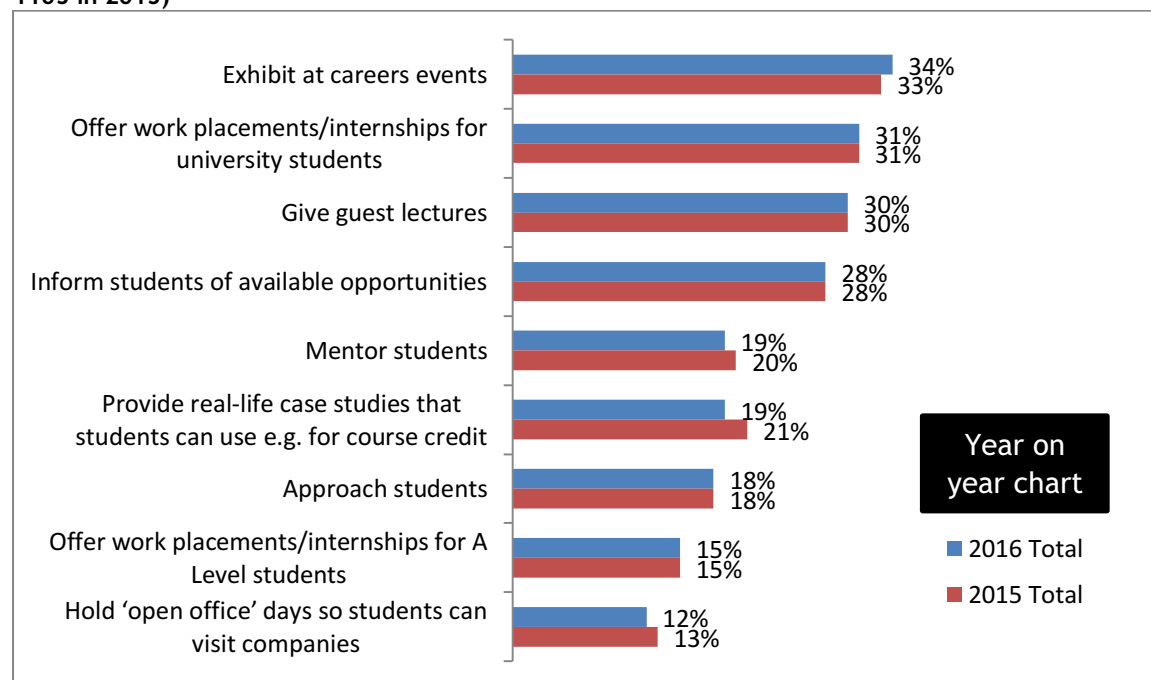


Students and applicants would welcome employers that are proactive in reaching out to them; approaching students, informing them of available opportunities and holding office open days were most suggested by participants as things employers could do more (by 59%, 57% and 57% respectively).

However, there is a division in how these efforts are received. Students are more likely to think that employers in their chosen field offer sufficient provision exhibiting at careers events (39%) and giving guest lectures (35%). More than this, they are more likely than applicants to feel that employers do not open enough work placements/internships for university students (55% feel they should do more compared to 46% of applicants).

Where employers currently perform best (i.e. “do enough”)

QM8. For each of these statements, which best describes what businesses in your chosen industry are doing to improve your employability? Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015)



The areas where employers currently perform best are felt to be exhibiting at careers events, offering work placements and internships for university students and giving guest lectures (consistent with 2015). Still, only around a third of participants feel that employers in their field do each of these enough (34%, 31% and 30% respectively).

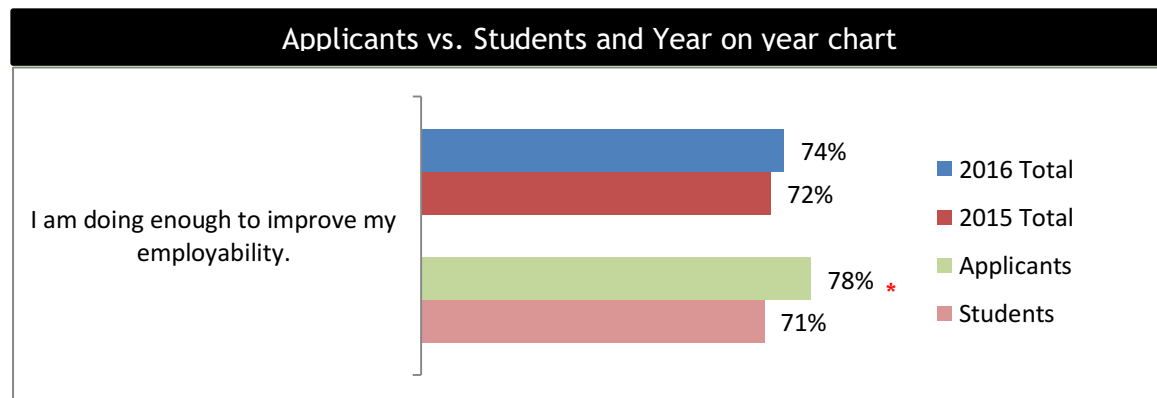
Implication:

Students and applicants have an open mind to a greater role being played by employers in enhancing their employability. Institutions could consider partnerships and collaborations with employers that could help them to share the burden of enhancing the employability of their students and thus enhancing their reputation.

Around three quarters of students and applicants feel that they are doing enough to improve their own employability

That students and applicants strongly feel that universities and employers could do more to help their employability and feel that employers should be more proactive in reaching out to them raises the question of how proactive they feel they are to improve their own employability.

QM7. Please tell us how much you agree or disagree with the following statements. Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015)



The majority of participants feel that they are doing enough to improve their own employability (74%, especially applicants 78%). This was higher among students of and applicants to universities outside of the Russell Group (76% compared to 70% studying at or applying to Russell Group universities).

Implication:

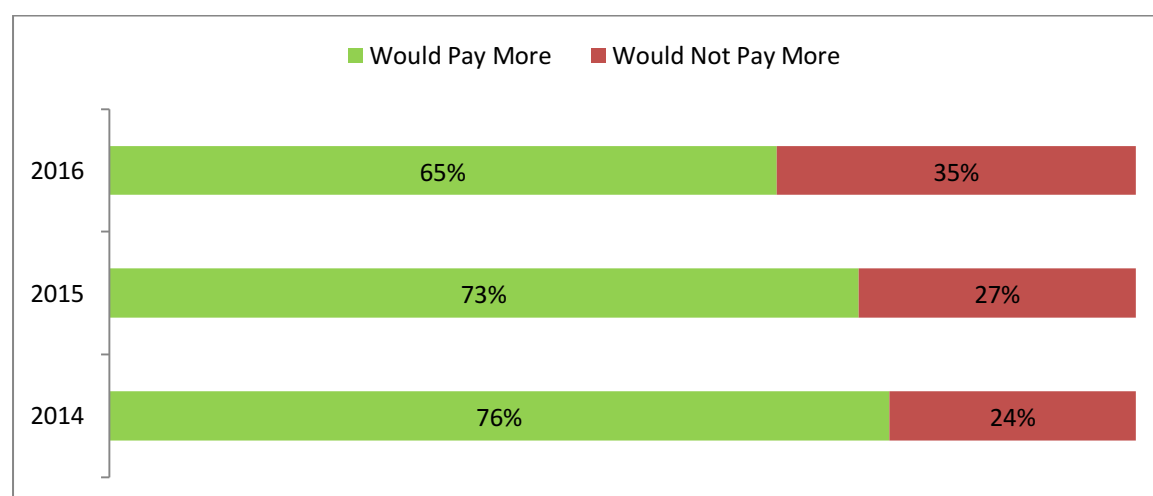
Considering that they rate themselves so well in enhancing their own employability but would prefer employers to reach proactively out to the, students and applicants appear somewhat naïve concerning employability. It could be that student support services need to emphasise what students can do for themselves.

As in previous years, around seven in ten students would pay more for their degree if employability was assured, though this is trending downward year-on-year

As previously described in this report, 54% of participants say that university study offering better long term salary prospects was a key reason to choose to apply to a university degree rather than to apply for other options. If this is one of the most important factors for attending university (among others), what value would students and applicants place on solid claims of employability?

More than three in five (65%) indicate that they would be willing to pay more for their degree if a graduate level job was guaranteed⁶. This is a lower than the 73% who were willing to pay more in 2015 and the 76% who were willing to pay more in 2014. There is a downward trend in both this and the average additional amount that students would be willing to pay, though recent announcements regarding student finance may have influenced this drop. This may be something that participants increasingly expect from universities but are not willing to pay extra for.

QN1. How much MORE would you be prepared to pay for your degree if, on graduation, it guaranteed you a job at a graduate salary of over £24,000? Base: 550 applicants and 558 students (1108 participants in total, 1105 in 2015)



Average amount that students would pay if a graduate level job was guaranteed	
Median Range Amount	£501-£1000
Mean Amount	£1527

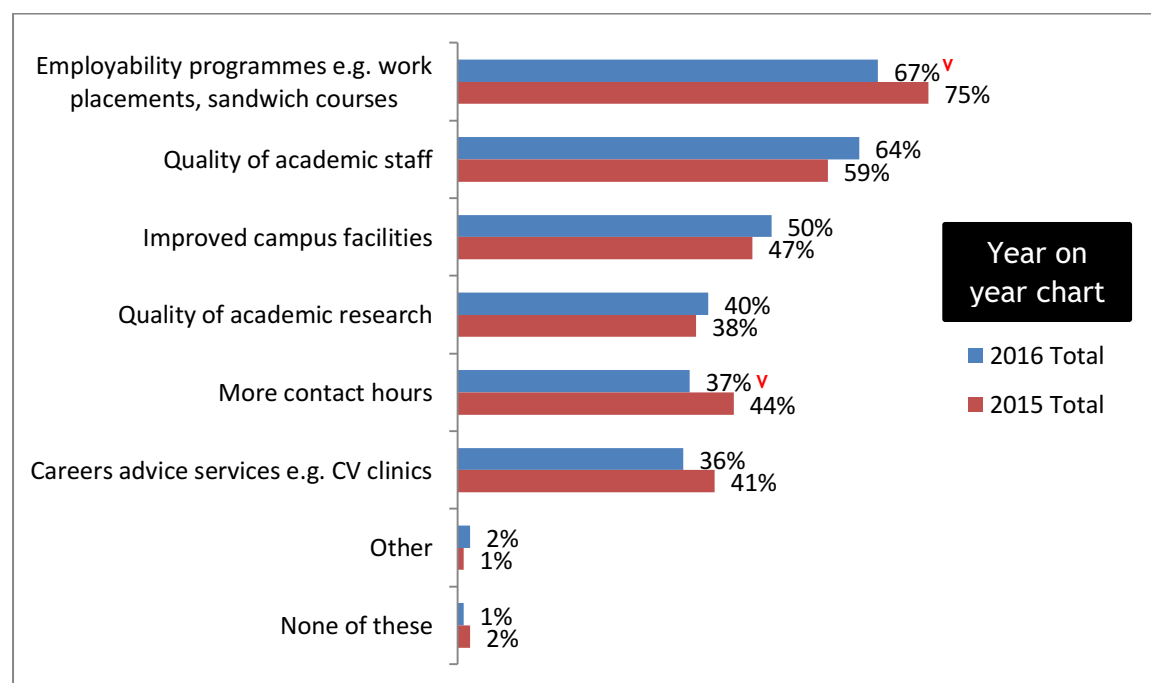
On average, applicants say that they would be willing to pay more than students (£1,739 vs. £1,318), following the trend seen earlier whereby students are more sceptical of the actions of universities to enhance employability. In addition men would be willing to pay more than women on average (£1,776 vs. £1,335) and (though robust bases for each course type was not achieved in this survey) there is some evidence to suggest that students and applicants in arts and humanities would be willing to pay more than subjects where employability is less of an issue (e.g. Medicine, Law and STEM).

As a 'guaranteed job' is an unrealistic prospect, this is largely offered as a thought experiment to help understand the vital importance of employability in the decision making of students and applicants and the value that they place on degrees.

⁶ Graduate salary of over £24,000 on graduation.

Participants that would be willing to pay more felt that this additional money should be spent on employability programs (i.e. work placements, sandwich courses, etc) but also the quality of academic staff and improved campus facilities. This underlines the importance of employability programs to students and applicants.

QM9. If you did pay this much more, what should your university spend this money on? Base: 724 participants who would be willing to pay more (806 in 2015)

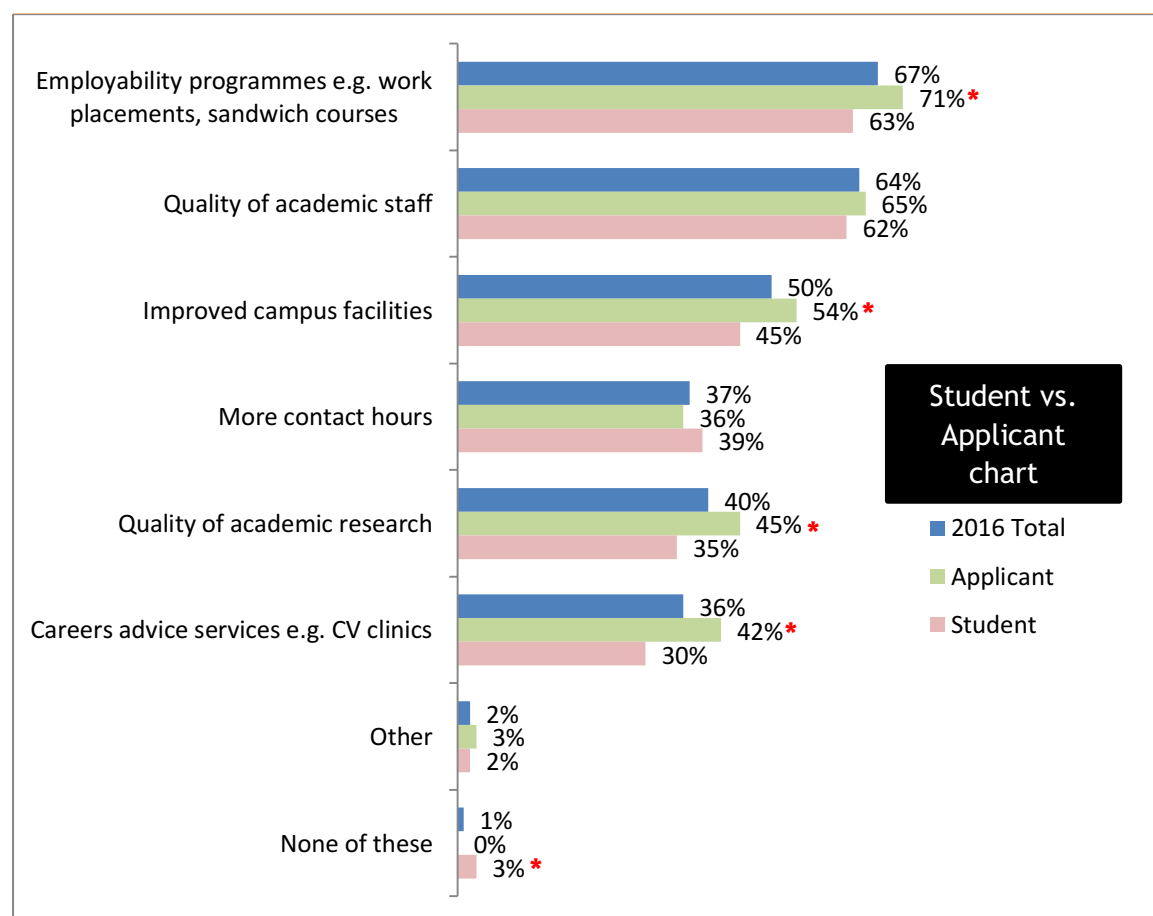


As seen in previous years, applicants were more likely than students to feel that employability programs, improved campus facilities, the quality of academic research and careers advice service should be funded by the additional money. Students are not significantly likely to suggest anything in particular to be funded, though this likely because they have more first-hand experience with these elements of the university offering and are more focused in where they suggest the money should go.

This year participants were less likely to focus on the money being spent on employability programs (down 8 percentage points from 75%, decrease seen in both applicants and students), though the basic order of priority in spending is unchanged.

Another feature seen in previous years is that women are more likely to suggest that employability programs and careers advice services should be funded (70% and 40% respectively).

QM9. If you did pay this much more, what should your university spend this money on? Base: 724 participants who would be willing to pay more (370 students and 354 applicants)



Implication:

That so many students would pay more for their degree in return for demonstrated employability shows the growing importance of employability in university choice. However, that the number who would do so is trending downward shows that this is also likely limited by perceptions of growing financial pressure on students.

Recommendations



Recommendations

Contributing to good student experiences

- UPP should consider messaging on the higher satisfaction among first year students who live in purpose-built student accommodation across a number of factors as it demonstrates the value of their role
- In addition, students who live in purpose-built accommodation emphasise a good accommodation experience and meeting new friends as especially important to them. UPP should emphasise the importance of the social side of purpose-built student accommodation.
- UPP should consider their strategy for addressing stress and coping strategies among tenants. This is because students who live in purpose-built student accommodation seem to be more vulnerable to loneliness/problems living independently.

Accommodation

- There is no fluctuation in the demand for purpose-built student accommodation as yet, though UPP should continue to monitor changes in student finances and university costs since financial factors are the main reason why students would choose halls but do not.
- UPP should continue to focus on the first year and plan that most students will no longer want to live in purpose built student accommodation in the second year.
- Any new buildings for UPP should be conveniently located for campus but do not actually have to be on campus (as there is no difference in rated importance between these).
- Beyond the location of the building and the rent, en-suite bathrooms remain one of the features that most participants considered important. The value of these should be emphasised to applicants, who can be anxious about sharing and are the ones making the accommodation arrangements for the first year of university.

Preparing for the TEF

- Currently, university choice is based heavily on course, location and reputation (with employability currently cited only by a minority). However, this may be about to change as the vast majority indicate the TEF could impact on their university choice. UPP should monitor the effect of the first years of implementation closely.

Apprenticeships

- Gaining a degree qualification while working under an apprenticeship scheme would make apprenticeships more appealing to the majority and overcome some of the concerns about being qualified for future jobs or missing out on higher salaries.
- This could be taken as positive news for the government's degree apprenticeships / higher apprenticeships as well as similar schemes from the private sector, validating the need for a program that combines real work experience and a qualification.

Employability

- Institutions can consider strengthening their offering with regards to improving the employability of students as this appears that it will be well received, if sufficiently communicated.
- Students and applicants have an open mind to a greater role being played by employers in enhancing their employability. Institutions could consider partnerships and collaborations with employers that could help them to share the burden of enhancing the employability of their students and thus enhancing their reputation.
- Considering that they rate themselves so well in enhancing their own employability but would prefer employers to reach proactively out to the, students and applicants appear somewhat naïve concerning employability. It could be that student support services need to emphasise what students can do for themselves.
- That so many students would pay more for their degree in return for demonstrated employability shows the growing importance of employability in university choice. However, that the number who would do so is trending downward shows that this is also likely limited by perceptions of growing financial pressure on students.

Appendix



Weighting Matrix

All weights are sourced from Higher Education Statistics Agency (HESA) figures.

	Achieved	Required	Factor
Total	5391	5391	1
	100.00%	100.00%	100.00%
2014 NatRep Student Male 17 or under	5	7.295	1.459
	0.09%	0.14%	145.90%
2014 NatRep Student Male 18	116	141.037	1.216
	2.15%	2.62%	121.58%
2014 NatRep Student Male 19	74	82.677	1.117
	1.37%	1.53%	111.73%
2014 NatRep Student Male 20 or over	151	99.698	0.66
	2.80%	1.85%	66.03%
2014 NatRep Student Female 17 or under	7	9.727	1.39
	0.13%	0.18%	138.95%
2014 NatRep Student Female 18	150	172.648	1.151
	2.78%	3.20%	115.10%
2014 NatRep Student Female 19	89	93.619	1.052
	1.65%	1.74%	105.19%
2014 NatRep Student Female 20 or over	199	122.799	0.617
	3.69%	2.28%	61.71%
2014 NatRep Applicant Male 17 or under	7	7.295	1.042
	0.13%	0.14%	104.21%
2014 NatRep Applicant Male 18	92	141.037	1.533
	1.71%	2.62%	153.30%
2014 NatRep Applicant Male 19	50	82.677	1.654
	0.93%	1.53%	165.35%
2014 NatRep Applicant Male 20 or over	79	99.698	1.262
	1.47%	1.85%	126.20%
2014 NatRep Applicant Female 17 or under	16	9.727	0.608
	0.30%	0.18%	60.79%
2014 NatRep Applicant Female 18	148	172.648	1.167
	2.75%	3.20%	116.65%
2014 NatRep Applicant Female 19	76	93.619	1.232
	1.41%	1.74%	123.18%
2014 NatRep Applicant Female 20 or over	200	122.799	0.614
	3.71%	2.28%	61.40%
2015 NatRep Student Male 17 or under	3	5.525	1.842
	0.06%	0.10%	184.17%
2015 NatRep Student Male 18	109	106.817	0.98
	2.02%	1.98%	98.00%
2015 NatRep Student Male 19	65	62.617	0.963
	1.21%	1.16%	96.33%
2015 NatRep Student Male 20 or over	76	75.508	0.994
	1.41%	1.40%	99.35%
2015 NatRep Student Female 17 or under	7	7.367	1.052
	0.13%	0.14%	105.24%
2015 NatRep Student Female 18	150	130.758	0.872
	2.78%	2.43%	87.17%
2015 NatRep Student Female 19	74	70.904	0.958

		1.37%	1.32%	95.82%
2015 NatRep Student	Female 20 or over	92	93.004	1.011
		1.71%	1.73%	101.09%
2015 NatRep Applicant	Male 17 or under	4	5.525	1.381
		0.07%	0.10%	138.13%
2015 NatRep Applicant	Male 18	103	106.817	1.037
		1.91%	1.98%	103.71%
2015 NatRep Applicant	Male 19	54	62.617	1.16
		1.00%	1.16%	115.96%
2015 NatRep Applicant	Male 20 or over	70	75.508	1.079
		1.30%	1.40%	107.87%
2015 NatRep Applicant	Female 17 or under	17	7.367	0.433
		0.32%	0.14%	43.33%
2015 NatRep Applicant	Female 18	128	130.758	1.022
		2.37%	2.43%	102.16%
2015 NatRep Applicant	Female 19	66	70.904	1.074
		1.22%	1.32%	107.43%
2015 NatRep Applicant	Female 20 or over	87	93.004	1.069
		1.61%	1.73%	106.90%
2016 NatRep Student	Male 17 or under	5	5.692	1.138
		0.09%	0.11%	113.84%
2016 NatRep Student	Male 18	104	106.471	1.024
		1.93%	1.98%	102.38%
2016 NatRep Student	Male 19	64	64.457	1.007
		1.19%	1.20%	100.71%
2016 NatRep Student	Male 20 or over	71	72.819	1.026
		1.32%	1.35%	102.56%
2016 NatRep Student	Female 17 or under	8	7.623	0.953
		0.15%	0.14%	95.29%
2016 NatRep Student	Female 18	137	131.868	0.963
		2.54%	2.45%	96.25%
2016 NatRep Student	Female 19	73	73.004	1
		1.35%	1.35%	100.01%
2016 NatRep Student	Female 20 or over	96	96.066	1.001
		1.78%	1.78%	100.07%
2016 NatRep Applicant	Male 17 or under	6	4.168	0.695
		0.11%	0.08%	69.46%
2016 NatRep Applicant	Male 18	117	112.641	0.963
		2.17%	2.09%	96.27%
2016 NatRep Applicant	Male 19	50	49.677	0.994
		0.93%	0.92%	99.35%
2016 NatRep Applicant	Male 20 or over	42	67.434	1.606
		0.78%	1.25%	160.56%
2016 NatRep Applicant	Female 17 or under	5	5.271	1.054
		0.09%	0.10%	105.42%
2016 NatRep Applicant	Female 18	153	146.424	0.957
		2.84%	2.72%	95.70%
2016 NatRep Applicant	Female 19	67	59.941	0.895
		1.24%	1.11%	89.46%
2016 NatRep Applicant	Female 20 or over	110	104.445	0.949
		2.04%	1.94%	94.95%

Notes on the MaxDiff methodology

Maximum difference scaling (known as MaxDiff) is a discrete choice model first described by Jordan Louviere in 1987 while on the faculty at the University of Alberta. The first working papers and publications occurred in the early 1990s.

With MaxDiff, survey respondents are shown a set of the possible items and are asked to indicate the best and worst items (or most and least important, or most and least appealing, etc.). MaxDiff assumes that respondents evaluate all possible pairs of items within the displayed set and choose the pair that reflects the maximum difference in preference or importance.

MaxDiff allows us to determine derived, rather than stated importance, getting to the heart of how people make decisions and what they really value in products and services. The benefit of using this methodology is that we are able to derive the importance of each decision making factor regarding university rather than relying on the respondents themselves to accurately report their preferences and behaviour through direct questioning and to unpick the choice components that drive their decisions.

In this case, the MaxDiff methodology is used to assess the relative importance of factors that might influence the decision of choosing *where* to study.

MaxDiff is able to provide a detailed weighting of how important different factors tested are in influencing the decision. With more traditional rating scales, it can be hard for respondents to accurately rank a large number of factors and there is a greater potential for scale bias. Conversely, in MaxDiff, factors can be weighed against each other, which provides a greater level of detail than the simple importance ordering available in ranking question formats.


MaxDiff results are aggregated to provide a relative importance score (an Index Score) for each attribute. This is based on the number of times attributes are chosen as most and least important (when presented with lists of four different options, a large number of times). The index scores derived for each attribute are standardised around a score of 100, which represents average importance. A score over 100 represents a higher than average importance (and the higher the score, the more relatively important) and a score under 100 indicates a lower than average importance (the lower the score, the lower the relative importance).

For more information, please contact

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The bottom half of the page features large, abstract geometric shapes. A light grey triangle points upwards from the bottom left corner. A darker grey triangle points downwards from the top right corner. These two triangles overlap, and the remaining area on the right side is filled with a solid orange color.